Persuasion with Precision:

Winning the AI Argument in the UK

May 2026

Teneo

Contents

01 Foreword

AI is already having seismic effects on Britain's economy, not least in the communications sector. But just because something is vitally important does not necessarily mean people will invest the time and effort to communicate about it in ways that genuinely move the dial.

When I was CEO and Chairman of the Conservative Party, I was struck by the temptation for politicians to make big decisions about what would persuade the public, based on little more than gut instinct. Sometimes those instincts would be right, but often they said as much about the politician themselves as they did about the voters.

As CEO of Teneo's Strategy and Communications business in the UK, my guiding principle has been the idea of 'persuasion with precision.' We don't just help companies navigate the complex stakeholder environments they face. We help them make the arguments that change minds and unlock operational and strategic value. We don't just rely on good judgement and broad experience to improve a company's reputation overall, we bring detailed knowledge, rigorous data and actionable insight to the why, the what and the how of corporate communications. With the right arguments, deployed in the right ways, at the right times, we know it is possible to shift perspectives in ways that make a material difference to our clients' businesses.

This report applies that approach to what might be the most important debate in the UK today: how far and how fast Britain adopts AI. That's not a question for us, it's one for the public, their representatives, the tech industry and leaders across the public and private sectors.

This report sets out where that question stands today and highlights the gap between that reality and perceptions within the UK tech industry. More importantly, it starts to identify the arguments that could make the biggest difference to changing that status quo. There is a route to building a stronger consensus across political divides, but there are also arguments that clearly fail to resonate, either in Westminster or the wider country.

The next few months and years will be pivotal in shaping Britain's AI future, whether we are on the leading edge, with all the attendant risks and opportunities, or once again trying to catch up with the big players in the U.S. and beyond. The public and politicians could go either way. The future will not just belong to those with the most advanced technologies, the most persuasive arguments will also be what tips the balance.

Andrew Feldman

CEO of UK Strategy & Communications
Teneo

02 Executive Summary

Britain is still persuadable on AI

Despite the confident views from the technology sector, public opinion on AI in the UK remains finely balanced. There is a winnable set of 'swing voters' but they are socially and economically distant from a thriving, young, educated technology sector. This makes the outcome of the debate contingent – not inevitable – and highly sensitive to how AI is communicated.

Only one argument really changed minds

When tested, only one of the pro-AI arguments explored produced a measurable shift in public opinion. It increased support for AI from a 'referendum-losing' 45% to a 'referendum-winning' 56%. This effect was observed across partisan and demographic groups. The same argument also emerged as the most persuasive among Members of Parliament (MPs).

The tech sector is misreading its core audiences

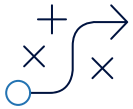
Across multiple measures, technology professionals struggle to accurately identify what most concerns and persuades both the public and politicians. Fewer than 2% of technology professionals polled could identify more than half of the most compelling arguments with the public or politicians – and the more senior they got, the more they struggled.

Safety – not jobs – is now the focus

While job displacement is often assumed to be the central anxiety around AI, it is far from being the most pressing worry today. Instead, concerns about safety, misuse, fraud and loss of control loom larger for both politicians and the public, including those who have adopted AI in their daily lives.

Winning on AI means winning in the NHS

This winning argument focussed on AI's potential to revolutionise public services. Crucially, this is not about abstract transformation, but practical outcomes – shorter waiting times, greater efficiency and better frontline delivery in the NHS. Across age groups and political divides, this relatively modest promise proved more powerful than more dramatic visions of how AI might transform society.



Persuasion, not just innovation, will determine AI's future

Advances in capability alone will not secure public or political backing for AI. Support will be shaped by how effectively the benefits are translated into outcomes people understand, trust and value. Organisations that pair innovation with compelling, resonant communication will be best positioned to build lasting consent for AI adoption.

Methodology

The research draws on four complementary workstreams to provide a holistic view across public, political, professional and expert perspectives.

1. Among the UK general public, a nationally representative sample of 2,004 adults was surveyed by FocalData. This had a ‘randomised control’ research design, as set out in section four.
2. Attitudes among policymakers were captured through a survey of 102 UK Members of Parliament, conducted by Yonder.
3. A dedicated survey of 502 UK technology professionals was also carried out by FocalData, offering insight into how those working closest to emerging technologies perceive the issues.
4. Quantitative findings were complemented by a series of in-depth expert interviews with communications specialists working on the frontline of AI questions, providing additional qualitative context and depth to the analysis.

All data was collected in Q1 2026.

Source Key

- UK General Public
- UK Members of Parliament
- UK Technology Professionals
- Expert Interviews with Top Communicators Focussing on AI Issues

Section 03

A Divided Public, Misread by the Tech Industry

The context for Britain today

Deborah Mattinson

Senior Advisor
Teneo

To analyse people's hopes and fears around AI, you need to understand the concerns and aspirations that dominate their day-to-day lives.

The world feels more uncertain than it has for decades. Longitudinal measures show geopolitical risk consistently well above average since the invasion of Ukraine. Against this backdrop, Britain faces its own challenges. 71% now believe the country is heading in the wrong direction. The public are hungry for change – the status quo no longer works and previously reliable institutions no longer seem to deliver. Yet at the same time, many yearn for support and guidance to navigate the turmoil.

Pessimism is at an all-time high. Many who would previously self-define as middle class feel robbed of that status as the cost-of-living crisis bites hard. This is especially true when considering the future. In the past, many felt reassured that their children could 'better themselves' but now worry that the next generation is unlikely to even sustain, let alone exceed, their parents' achievement. Recent polling shows almost twice as many Brits expect their kids to be worse off than they are than expect them to do better.

Technology poses a particular threat. Many are wary of the risks ahead and concerned about their children's job prospects. They no longer trust politicians: the latest polling shows the lowest score for more than 40 years at 9%. Increasingly they are sceptical about business too. When asked who they place confidence in to manage the future of AI, only 19% of respondents said they trust the government. However, tech companies are hardly faring better, with only 29% of respondents saying they felt they could trust them.

This feels like a moment of inflection. The public do not yet have a settled view on AI and, as they face an insecure future, are unsure about whether AI will be a saviour or a threat. They are open to persuasion. This research highlights some fascinating opportunities for the sector and all who deal with it. The time to act is now.

See appendix for data sources.

A fast-evolving debate

New technologies develop in fits and starts. It took five years to go from IBM Watson winning Jeopardy! to AlphaGo defeating the top Go player Lee Sedol. But it only took two years from GPT-3 being released to ChatGPT becoming the fastest-growing consumer app in history.

Public debate is equally non-linear. Issues can spend years on the to-do list of junior civil servants and think tanks, only to suddenly become the central focus for Cabinet Ministers and Number Ten. Polling reflects what's front-of-mind today, so attitudes to low-profile questions can shift wildly in the wake of a single piece of news. No sooner has the conversation developed a pattern – like the 'stochastic parrot' jibe – then the technology has made it outdated. That combination makes it hard to predict the UK's future when it comes to AI.

In discussions with the regional leader of a major technology company, it was noted that the UK debate often overemphasised Britain's potential at the leading edge of innovation. But AI's importance to Britain is hard to overplay: the industries that have driven Britain's growth over a generation – finance, professional services, creative industries – are the ones facing the most immediate threat of disruption.

"The big global players tend to say similar things," noted a policy and public affairs leader at one business wrestling with the threat of AI and copyright. "More cautious and sceptical positions tend to come from a variety of different directions, whether it's about intellectual property, or jobs or something else. They're not united behind one flag."

This perspective was echoed in discussions with communications leaders in the tech industry. They don't see an array of AI "detractors" forming an anti-AI coalition. Instead, the anti-AI arguments are diffused and unconnected, described by one communications leader as running from the "big fear about AI decimating the working environment" on one hand to "the people who are trying to stop a science-fiction scenario" on the other.

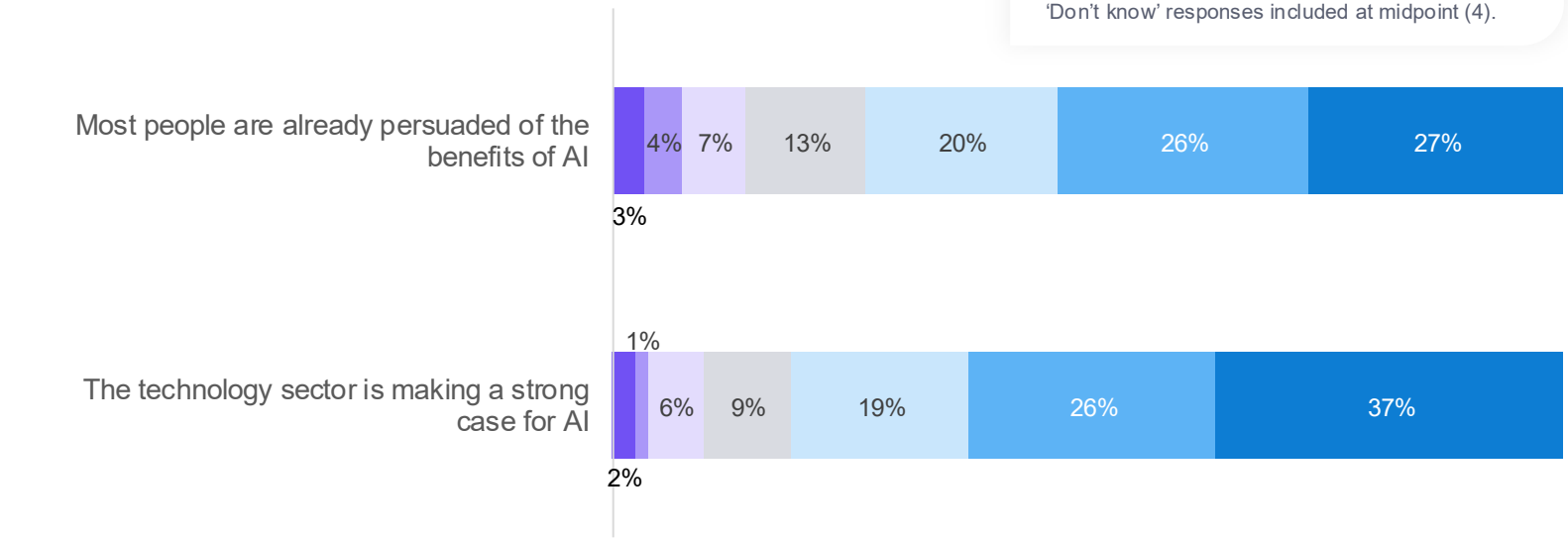
> More cautious and sceptical positions tend to come from a variety of different directions, whether it's about intellectual property, or jobs or something else. They're not united behind one flag.
>
> – Communications leader

This research found that concerns about AI are more widespread than the industry realises.

When UK technology professionals were polled, they were confident that the technology sector is making a strong case for AI, and that most people are already persuaded of its benefits (Figure 1.1).

Figure 1.1

Question | Thinking about the public debate around AI in the UK, to what extent do you agree or disagree with the following statements?



But the public are, in fact, quite divided about AI. AI optimists make up around one third of the adult population, with AI pessimists making up a similar proportion (Figure 1.2). The remainder are unsure or undecided.

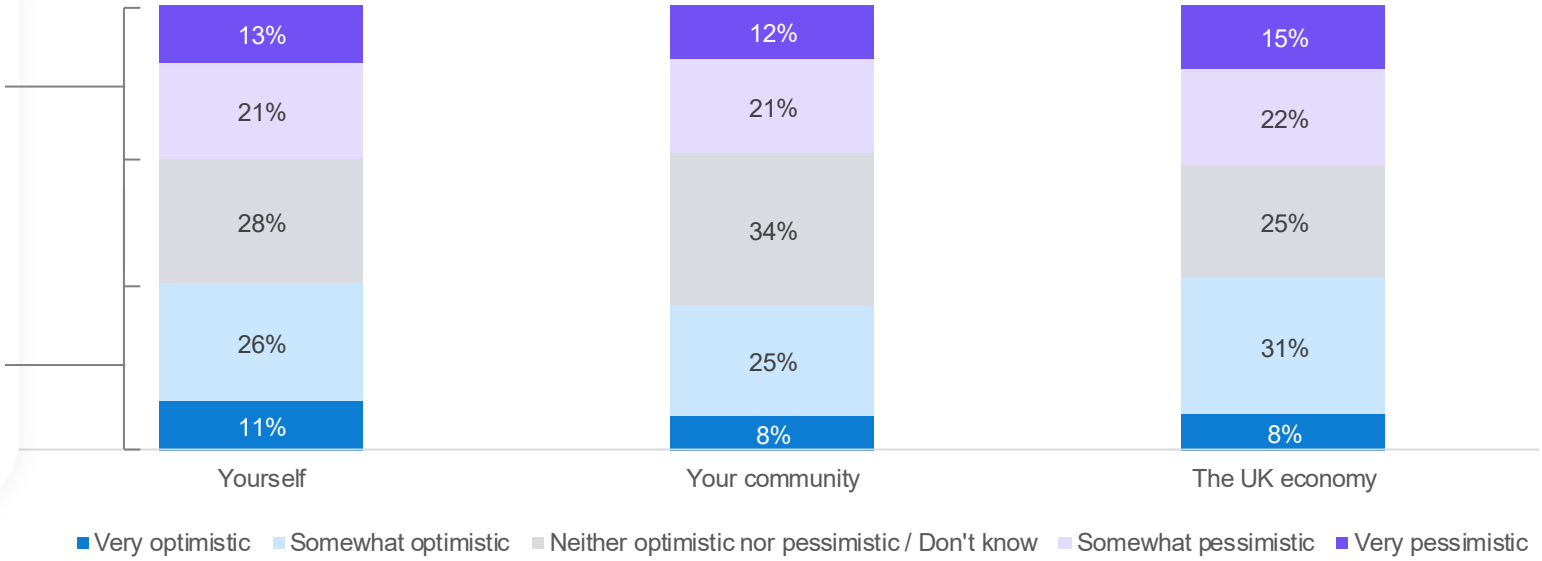
Public opinion is split

35% pessimistic

37% optimistic

Figure 1.2

Question | Do you feel more optimistic or pessimistic about the impact AI will have on each of the following over the next 10 years?



Totals do not sum due to rounding.

Mapping the different sources of concern

Using AI, as well as more traditional manual search, the main concerns about AI were identified as they show up in UK media and policy contexts. These were grouped into three broad categories, and each then subdivided into two, as shown in Figure 1.3. This then provided six key AI-sceptical arguments, from concerns about jobs through to the threat of a 'runaway' technology that could become unpredictable or even uncontrollable by governments.

Figure 1.3

Economic impacts	Social impacts	Safety and security
As more tasks are automated, many middle income **jobs** will be lost across the country, while most of the economic gains will be concentrated outside the UK	AI will allow governments and businesses to introduce **mass-surveillance** through technologies like facial recognition and, because of the way AI is trained, it is likely to embed and reproduce **biases** against women and ethnic minorities	AI tools are making it easier for anyone from **fraudsters**, to child **abusers**, to hostile states to manipulate, scam or disrupt our lives and communities
AI threatens our culture and **creative industries**, flooding the world with homogeneous AI-slop while making it impossible for artists, writers, musicians and others to make a living	Training and running AI models consume vast amounts of electricity and other resources, potentially reversing progress on tackling **climate change**	AI technology is developing much faster than any regulations designed to control it and ultimately it may do large-scale or **irreversible harm** in ways we **cannot predict**

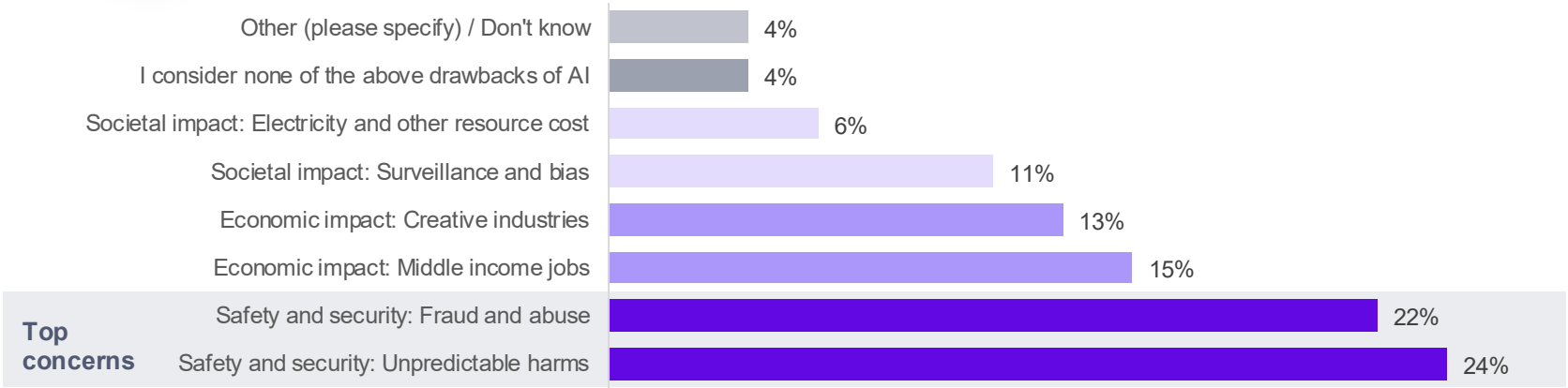
Shortened summaries presented, full text in the appendix.

Safety – not jobs – is now the focus

The general public was asked which of these arguments was most worrying – or they were given a chance to say that they had no concerns (Figure 1.4). The result was clear: people were most likely to say they were worried about issues of safety and security (47%); either from the threat of fraud and abuse (22%), or the risk that AI evolves in unpredictable and harmful ways (24%).

Figure 1.4

Question | Which of the following, if any, do you consider to be the most important drawback of AI?



Percentages rounded; chart bars reflect unrounded values.

These concerns were not limited to those who were older or less familiar with the technology (Figure 1.5). While older age groups (those aged 55 and above) are particularly concerned about the potential harms from AI, safety and security remains the leading concern across all age groups. Even among those who use AI daily, safety and security is cited as the most pressing concern (40%) (Figure 1.6).

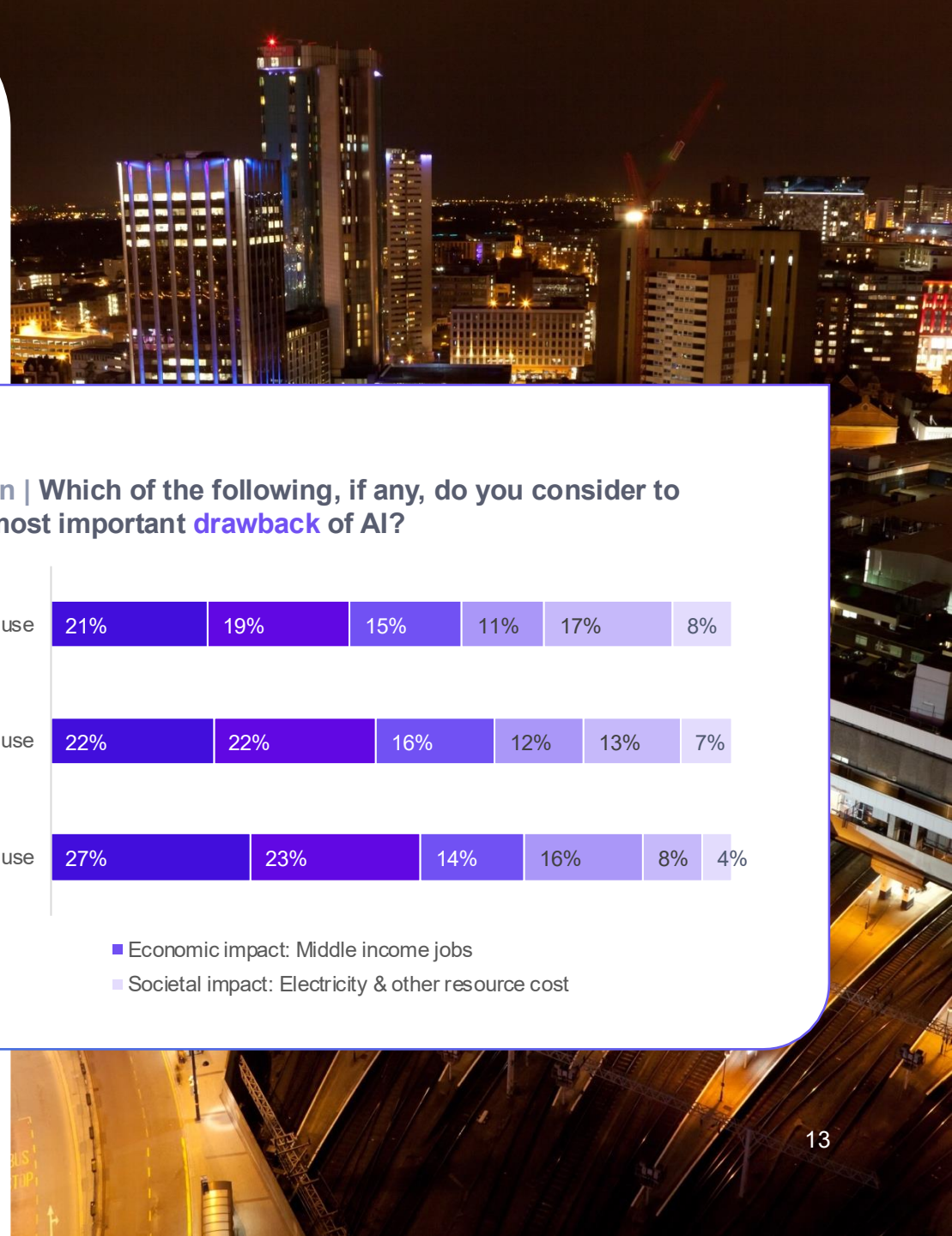


Figure 1.5

Question | Which of the following, if any, do you consider to be the most important drawback of AI?

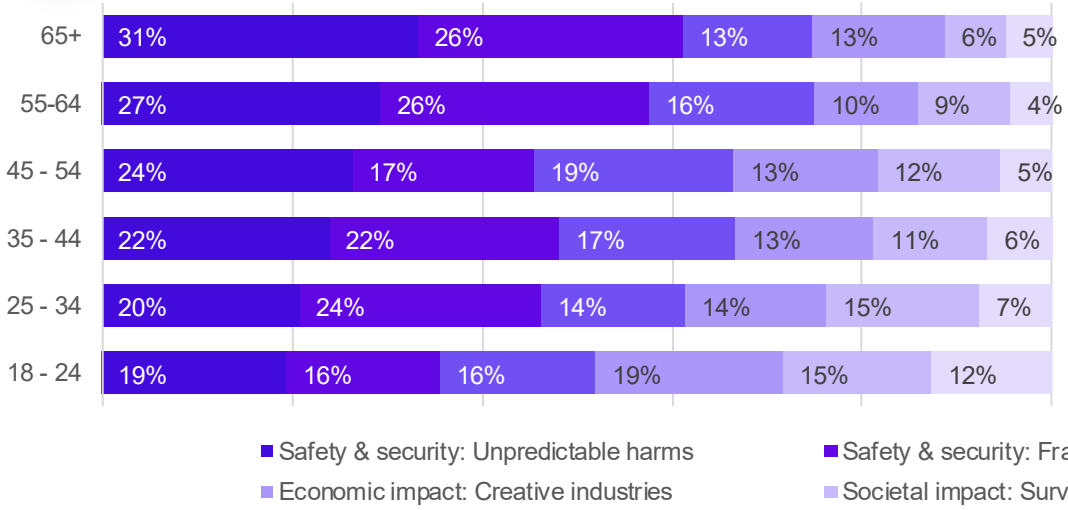
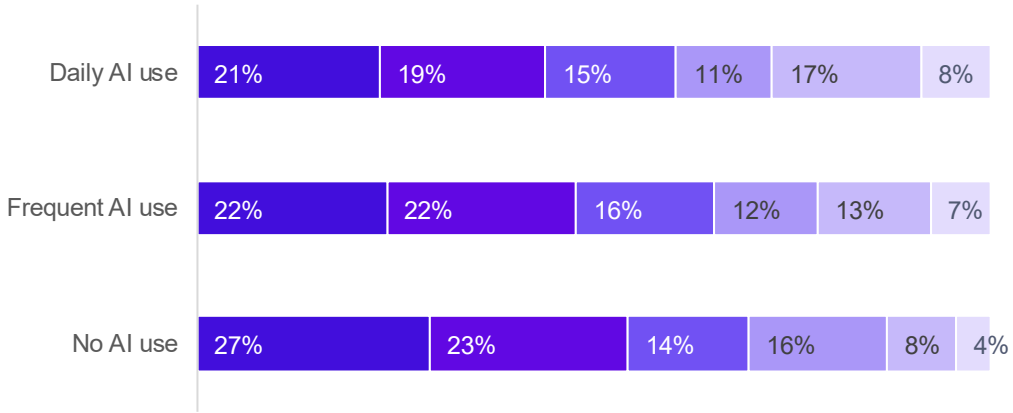
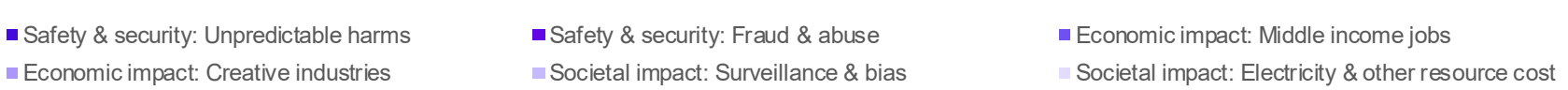


Figure 1.6

Question | Which of the following, if any, do you consider to be the most important drawback of AI?





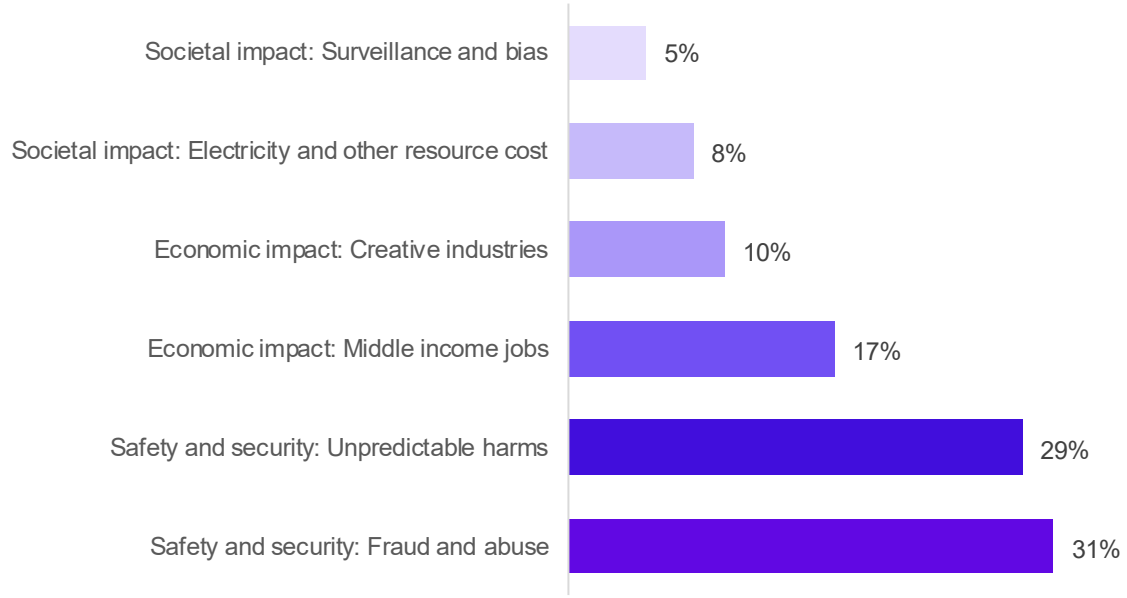
'Don't knows' and non-answers excluded.

Political concern reflects public concern

MPs (Figure 1.7) also tended to pick out these safety and security concerns as being the most persuasive (59%).

Figure 1.7

Question | Below is a list of arguments which have been made against increasing the use of AI in the UK. Which of the following do you think would be most persuasive to MPs? Please select one argument only.



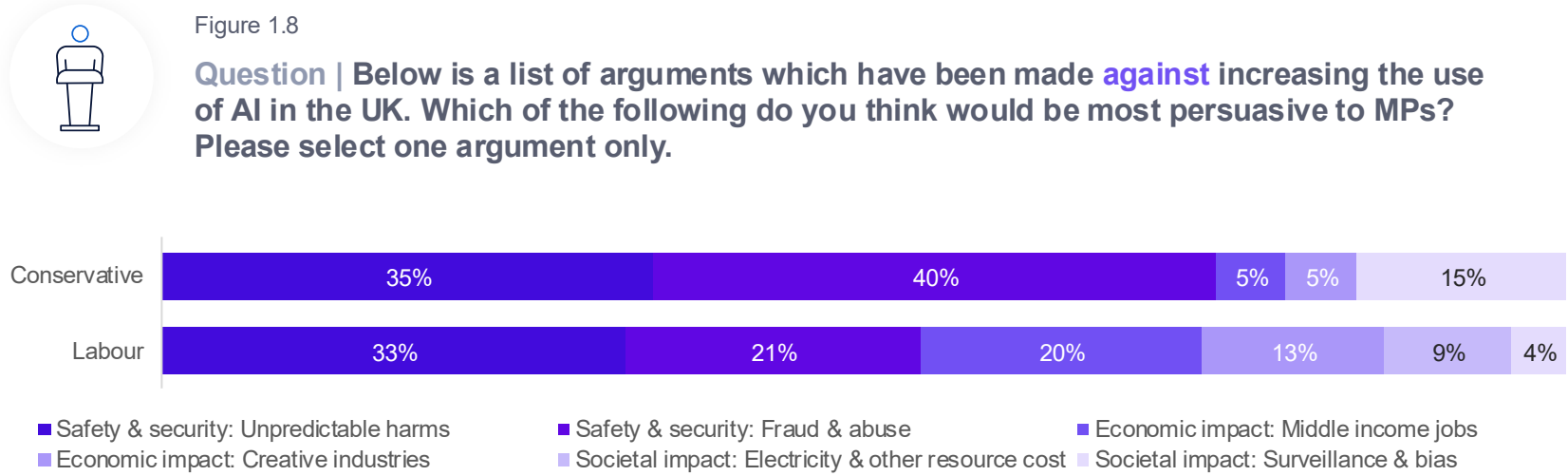
Totals do not sum due to rounding.

Examining attitudes by party reveals safety concerns cut across the political divide, with unpredictable harms, fraud and abuse remaining the most salient worries for both Labour and Conservative MPs.

However, the potential impact on jobs emerges as a bigger secondary concern for Labour MPs, while featuring less strongly among Conservative MPs (Figure 1.8).

Figure 1.8

Question | Below is a list of arguments which have been made against increasing the use of AI in the UK. Which of the following do you think would be most persuasive to MPs? Please select one argument only.



Labour n=72, Con n=21. 'Don't knows' and non-answers excluded.

The tech sector isn't focussed on the most widespread doubts about AI

Were these the concerns that the technology industry expected to find? Not exactly.

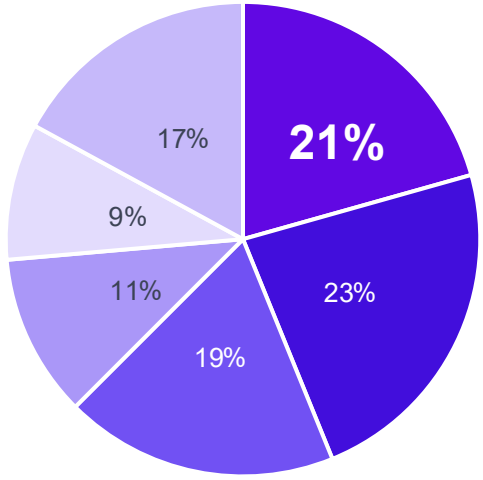
As shown in Figure 1.9, only around one in six tech professionals correctly identified unpredictable harms as the leading concern amongst the general population. A similar proportion (21%) correctly predicted that politicians would be most worried about fraud and abuse.

While a sizeable percentage correctly identified safety-related risks as the leading concerns for both audiences, they were often more likely to see economic concerns, especially around jobs, as likely to dominate public and political opinion.

Clearly, the potential impact of AI on jobs is not going away – but this data suggests that the industry needs to appreciate that public and political concerns go wider and deeper, focussing instead on the security and safety threat that AI could pose.

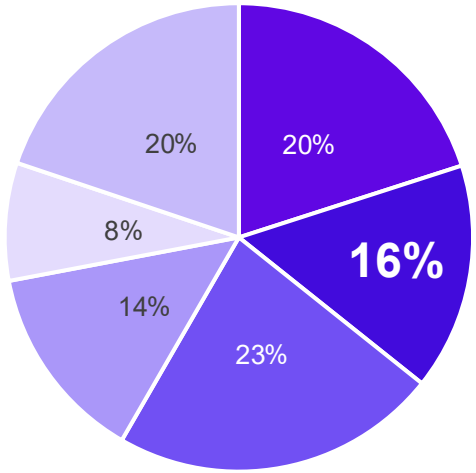
Figure 1.9

Question | Which argument do you think would be most likely to persuade MPs to oppose a bigger role for AI in the UK?



Tech sector view:
What persuades MPs

Question | Which argument do you think would be most likely to persuade the general public to oppose a bigger role for AI in the UK?



Tech sector view:
What persuades the public

- Safety and security: Fraud and abuse
- Safety and security: Unpredictable harms
- Economic impact: Middle income jobs
- Economic impact: Creative industries
- Societal impact: Electricity and other resource cost
- Societal impact: Surveillance and bias

See appendix for full argument descriptions.

Section 04

Persuading the Public with Precision

Turning this insight into campaigns

Elisabeth Field

UK Head of Strategy
and Campaigning
Teneo

For tech businesses, corporate reputation is now shaped as much by trust, scrutiny and societal permission as it is by innovation itself.

Our data points to a more exacting environment in which optimism about technology remains, but is increasingly dependent on clearer proof of value, greater transparency on risk and stronger signals of accountability.

That raises the bar for corporate communications and reputation management. The challenge is not simply to tell a more confident story about growth disruption or future potential. It is to identify the arguments that will stand up to scrutiny and shift opinion among the audiences that matter most: policymakers, investors, customers, employees and the wider public. It means moving beyond broad narrative and attention-grabbing moments into sharper, evidence-led, long-term positioning.

The most effective communications strategies will therefore be those built with precision, grounded in deep knowledge of the audience groups, disciplined in message choice and designed to change perceptions in ways that create lasting reputation and business advantage.

In a market where new competitive threats are emerging every day, and optimism can quickly turn into scepticism, credibility becomes a vital strategic asset.

A crowded messaging landscape

Few members of the public have failed to notice at least some of the noise being made about the positive potential of AI. Many have already adopted it in their own work or personal lives. But there is no one dominant argument for AI. AI's leading advocates – whether in the private or public sectors – regularly jump from one theme to another. It isn't clear which arguments are cutting through, or which ones truly resonate with the public.

To navigate this complex landscape, a combination of manual and AI-led techniques was used to draw out the most prevalent pro-AI arguments we see from tech companies and relevant public bodies today (Figure 2.1). Some arguments were clearly economic, while others had a more societal focus. A 'reassurance' argument was also included, reflecting the tendency of many AI advocates to acknowledge potential risks and downsides before outlining how these concerns can be addressed.

By simplifying a multifaceted debate in this way, attention can be focussed on the most interesting question: which of these arguments genuinely persuade?

Figure 2.1

Economic benefits	Societal benefits	Reassurance against risk
AI will make Britain a global success story AI is reshaping the world and Britain cannot afford to lag behind. Supporters say AI will drive growth, raise productivity and create new industries. At scale, it could significantly boost the economy by the mid-2030s, strengthen UK research and manufacturing, and foster homegrown tech champions that compete globally and successfully.	**AI will revolutionise our public services** AI is helping public services achieve more. In the NHS, it can speed diagnosis, manage waiting lists and support new treatments. Beyond health, AI can boost public safety and cyber-defence. By improving efficiency and handling routine admin, it frees frontline staff to focus on skilled, high-value work.	**AI can be developed and used safely and responsibly** Many people worry about AI's risks, but clear rules and strong safeguards can manage them. The UK supports robust regulation, thorough testing and human accountability for major decisions. Working with international partners on safety standards, while boosting public understanding and digital skills, can build trust and ensure AI benefits everyone securely.
AI can make us all better off AI could make people better off by handling routine tasks, helping workers achieve more in less time and potentially boosting wages as productivity rises. It can level the playing field for small firms, giving access to advanced tools, supporting growth, creating jobs and expanding secure, high-quality opportunities across the UK.	**AI will transform everyday life** AI could improve everyday life by handling frustrating tasks and making services easier to navigate, from public support to legal or financial advice. It can cut stress, save time and reduce energy waste. AI also supports older people and those with disabilities, offering practical, everyday benefits people can genuinely feel.	

Shortened summaries presented, full text in the appendix.

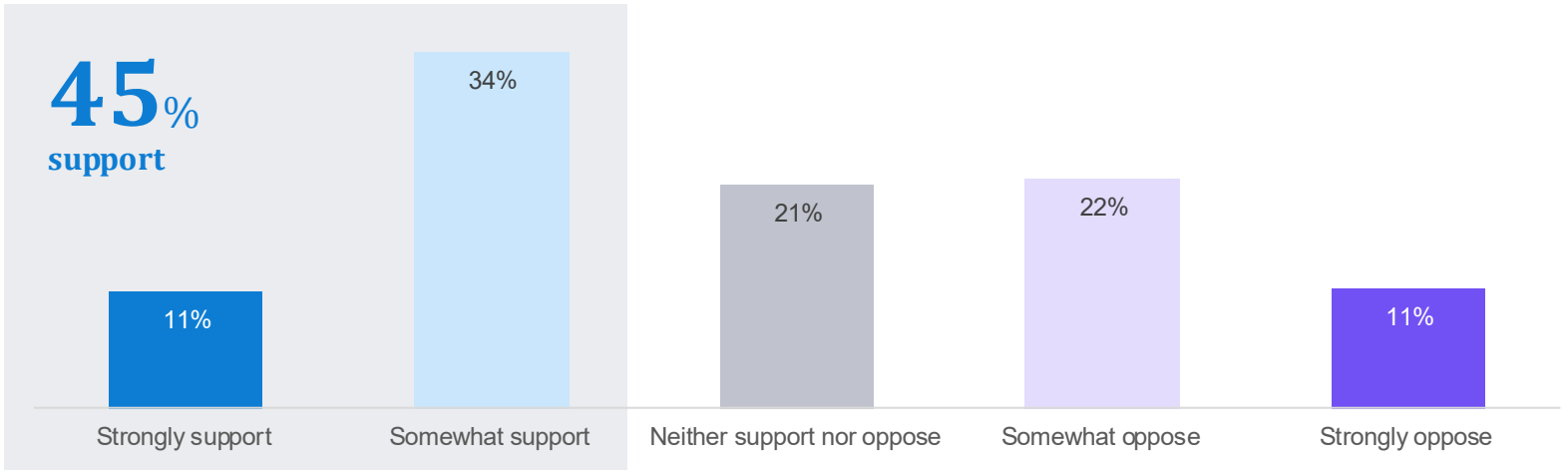
No clear majority for expanding AI in the UK

The aim was to assess which of these arguments is most persuasive, but first it was necessary to establish a baseline. One sixth of participants were randomly selected and assigned to a control group, where they were given no prompting about AI's pros or cons. Instead, this control group was simply asked whether they supported or opposed the increasing use of AI in the UK – the key question for Britain's AI future.

As shown in Figure 2.2, the results show a divided public. While 45% expressed support, this falls short of a majority, with significant proportions either opposed (33%) or undecided (21%). Notably, support for AI exceeds optimism about its impact – but it still fails to command a majority of the public.

Figure 2.2

Question | Overall, do you support or oppose the increasing use of AI in the UK? *(Control group)*



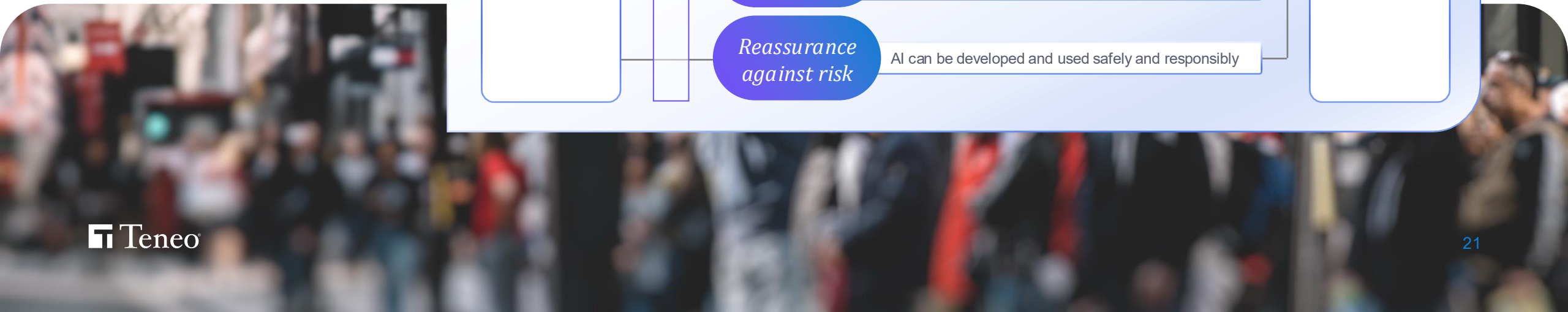
Unweighted control group n=325 data shown.

Testing what persuades

If one in six participants were randomly allocated to a control group, what happened to the rest? They were randomly assigned to see one of five pro-AI messages, as shown in Figure 2.3. After reading a single pro-AI argument of around 150 words, they were then asked about their support for AI. This allowed differences in attitudes compared to the control group to be measured, with any statistically significant change attributable to the text they had read.

Figure 2.3

How we identified which will move the dial



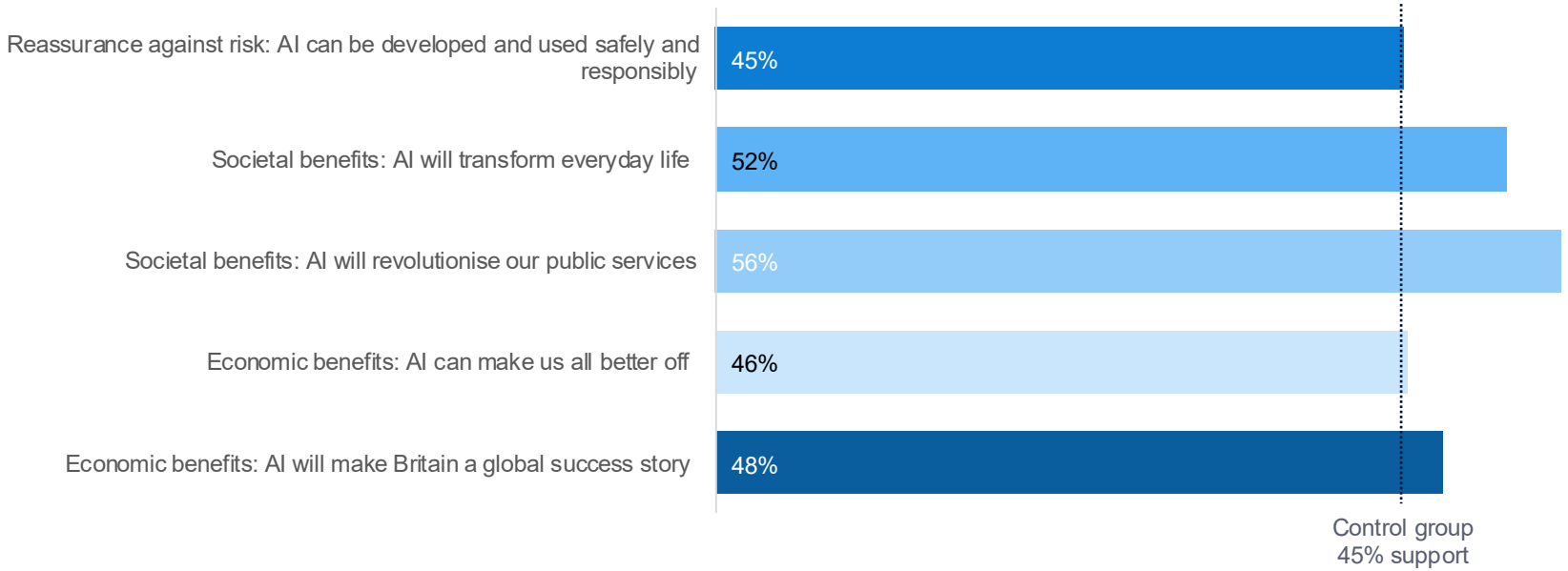
Only one argument significantly moves the dial

Support for AI was higher than in the control group among some of the groups that had seen a pro-AI argument. However, the difference was only statistically significant in one group: participants who had seen an argument about how AI could improve public services (Figure 2.4).

Those who had seen this argument – even though it was only a couple of hundred words – were substantially more likely to support AI than the control group. A single exposure to this argument increased support from 45% in the control group to 56% in the treatment group.

Figure 2.4

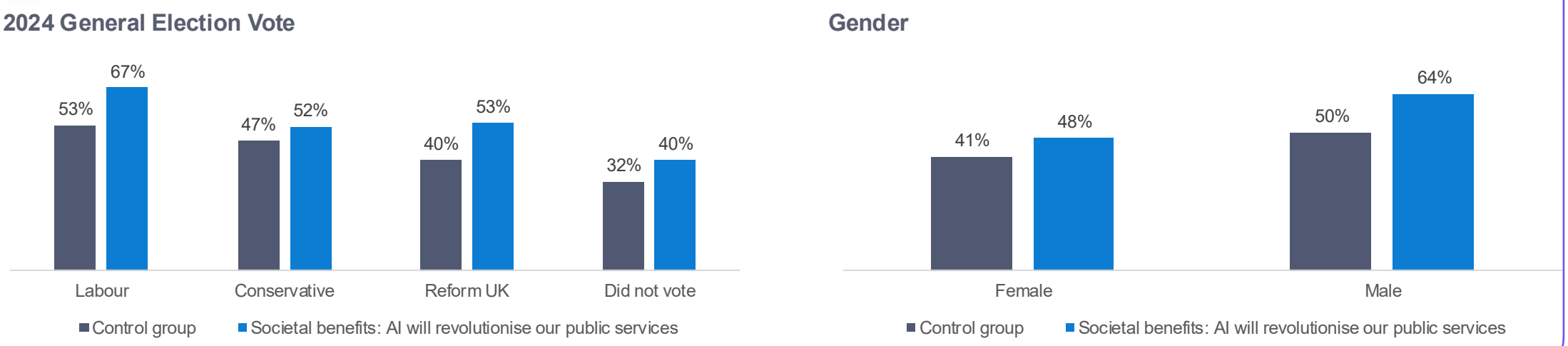
Question | Overall, do you support or oppose the increasing use of AI in the UK?
(After seeing a pro-AI argument)



Importantly, this effect is not confined to a single audience. As shown in Figure 2.5, the public services argument increases support across political and demographic groups. While baseline levels of support vary, all groups become more supportive when exposed to this message.

Figure 2.5

Question | Overall, do you support or oppose the increasing use of AI in the UK? *(After seeing a pro-AI argument)*



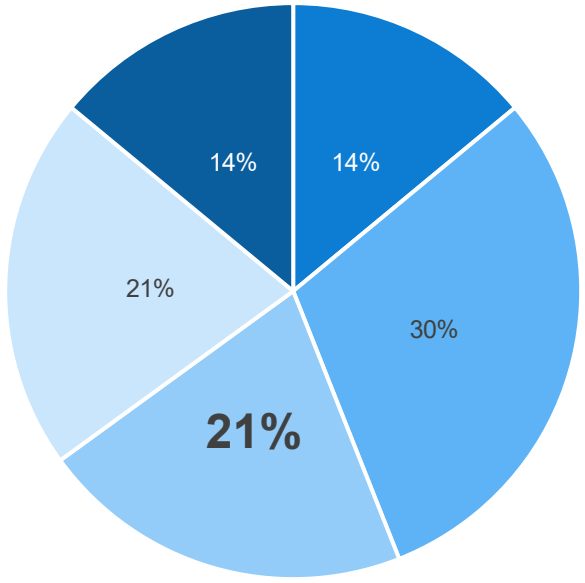
Unweighted data. Some of the sample sizes shown here are small and should be treated as indicative only.

Few in the sector spot their winning card

The public services argument was not the one that most technology professionals guessed would work with the general population. Only one in five picked this as the most effective of the five arguments (see Figure 2.6) – effectively little better than chance.

Figure 2.6

Question | Which argument do you think would be most likely to persuade the general public to support a bigger role for AI in the UK?



- Reassurance against risk: AI can be developed and used safely and responsibly
- Societal benefits: AI will transform everyday life
- Societal benefits: AI will revolutionise our public services
- Economic benefits: AI can make us all better off
- Economic benefits: AI will make Britain a global success story

The most persuasive arguments aren't always the most liked

To dig deeper into why different arguments had different effects, participants were asked to evaluate each message based on novelty, credibility and relevance (Figure 2.7).

Across these measures, most arguments performed similarly. The clearest exception was the argument that AI would make everyone better off, which performed the poorest across the three measures, particularly on credibility and relevance.

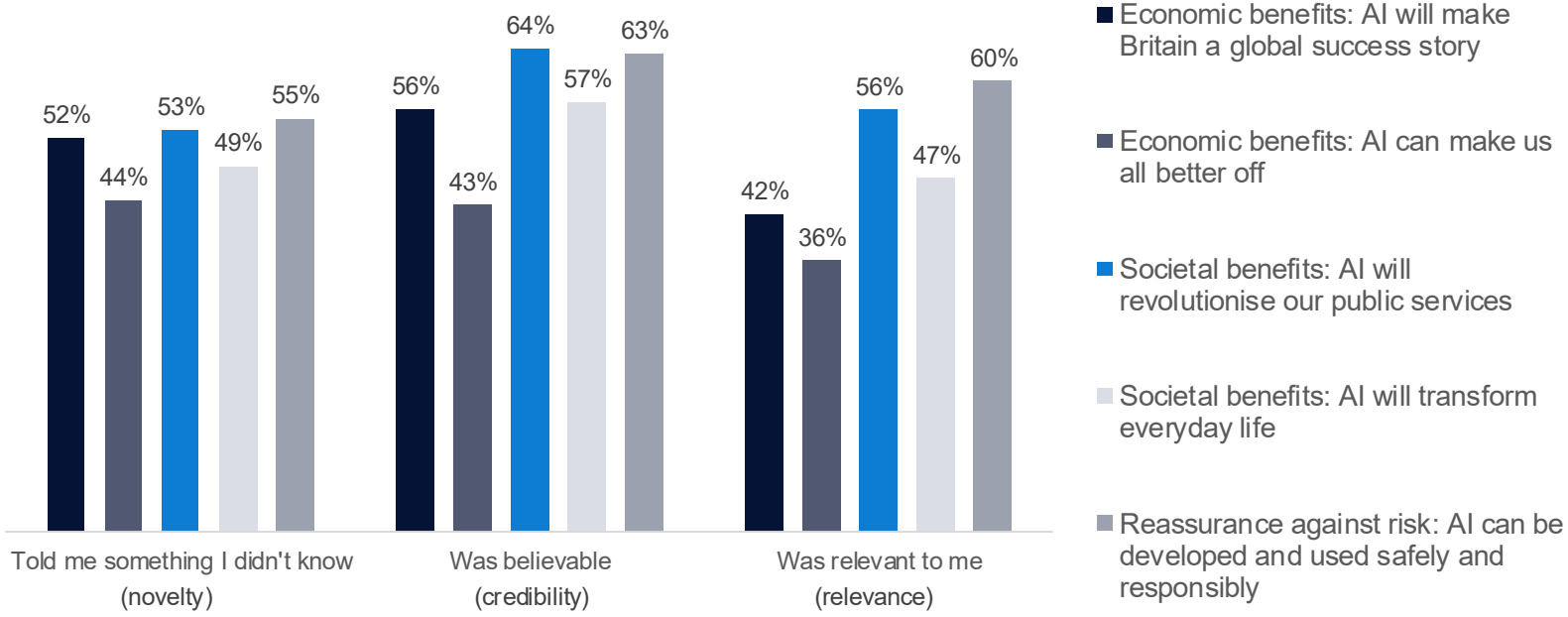
The reassurance message – emphasising that AI can be developed safely and responsibly – scored particularly highly on credibility and relevance. However, this did not translate into increased support.

This highlights the value of RCT-style (randomised-control trial) research. Simply asking participants which arguments they agree with would have pointed towards messages that appear convincing but are demonstrably less effective at changing attitudes.

While the public services argument did not dominate on every stated metric, it stood out as the most relevant among the positive, benefit-led messages, i.e. ones that did not focus on reassurance.

Figure 2.7

Question | How much do you agree or disagree with the following statements about the information you have just read?



Percentage selecting 5-7 on a 7-point scale.

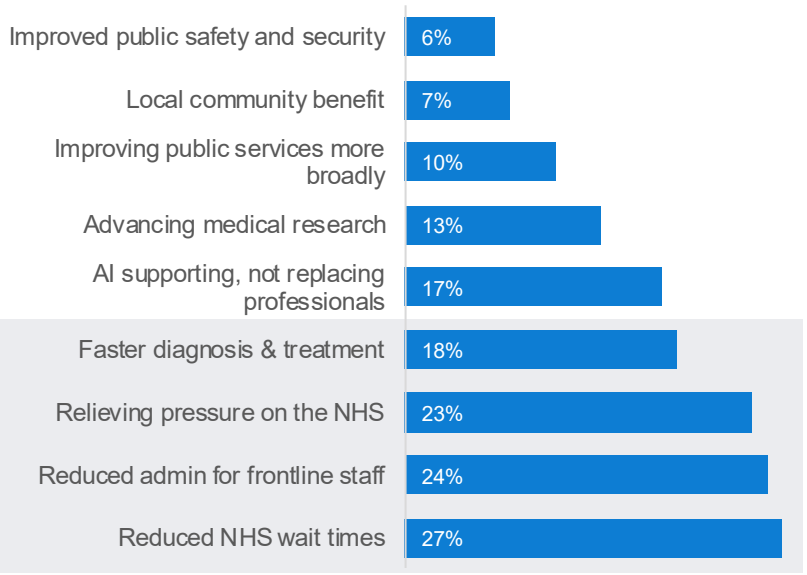
Why the public services argument works

Participants who saw this message were asked to provide a more detailed explanation of what they liked about it, as it covered several parts of the public sector (Figure 2.8).

This showed that they were focussing on the potential for improvements in the NHS. In particular, participants pointed to practical, everyday improvements, such as shorter waiting times, rather than on revolutionary breakthroughs in the health service. The promise of a better-functioning NHS might sound prosaic, but it was what engaged and animated these people most.

Figure 2.8

Question | You indicated you like the message you have just seen. Why is it you say that? Please explain using as much detail as possible.



Respondents who saw and liked the Public Service message n=186 [Liked strongly / Liked somewhat]
Open ends coded into categories using ChatGPT.

> The NHS is severely understaffed and put under immense pressure. AI will drastically improve efficiency.

> AI technology will help the NHS become more efficient and may help reduce waiting times.

> I like the idea of being seen quickly and no waiting list.

> I like that it could free up staff to do the work they are highly trained for rather than routine admin tasks.

> The NHS waiting time is very daunting. Seeing that AI can improve this gives me hope for the future.

Who is being persuaded?

The success of the public services message becomes intuitive when considering the 'swing voters' in the AI debate, who are likely to be the most open to persuasion. If they were to shift in one direction, the technology would gain real public backing; if they were to shift the other way, they could create an AI-sceptic majority.

As shown in Figure 2.9, this group tends to skew older, are less likely to have a degree and are more likely to come from lower-income households. But, in many ways, they reflect the country as a whole; with a roughly 50:50 split of men and women and a spectrum of political views that reflects where the polls stand more broadly.

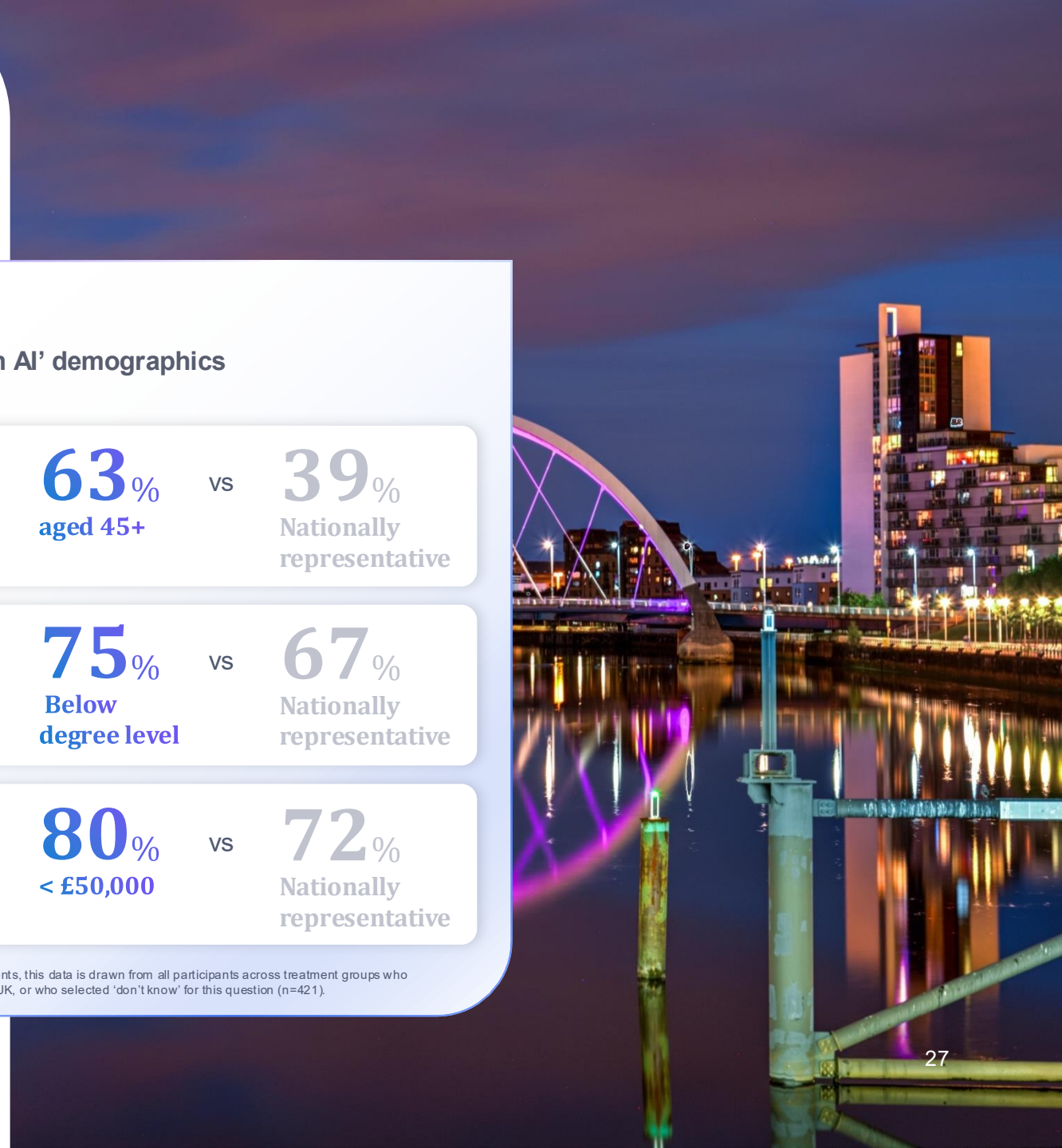
This suggests that there is a substantial population in the country that is persuadable on AI, but that they live lives that may feel socially and technologically distant from the cutting-edge technology firms of the UK, let alone Silicon Valley.

Figure 2.9

'Swing voter on AI' demographics

Heavily represented by older age profiles and those post-retirement age	**63%** aged 45+	vs	39% Nationally representative
Lower formal educational levels	**75%** Below degree level	vs	67% Nationally representative
Lower household income	**80%** < £50,000	vs	72% Nationally representative

Having found no demographic interactions with the treatments, this data is drawn from all participants across treatment groups who neither support nor oppose increasing the use of AI in the UK, or who selected 'don't know' for this question (n=421).



Section 05

Persuading Politicians with Precision

The debate in Westminster

Nick Laitner

Senior Managing Director
Teneo

The consistent theme of the Starmer administration is a Government that has never been fully in control.

Buffeted by geopolitical events it can't influence, an apparently illusory parliamentary majority and the increasingly agenda-setting Reform and Green parties, No 10's response is to stick to its long-term strategy of incremental public service improvement and economic stability.

The Government's AI strategy is a core plank of this economic agenda; Rachel Reeves' recent Mais Lecture was a paean to the growth potential of AI. We see the UK positioning itself, on AI as on much else, as a sensible halfway house between the under- and over-regulation of the U.S. and the EU.

However, there are difficult challenges ahead and the Chancellor's growth mission faces significant headwinds. The creeping Milibandisation of the Labour Government will lead to an ever-increasing focus on cost-of-living at the expense of growth and investment.

Rising energy costs will lead to scrutiny of data centres' role in energy use and grid connections, while planning regulation will remain a blocker to AI-led growth.

Alongside this, there is a clear sense that pure technical understanding of the AI ecosystem continues to lag in Westminster. AI is largely understood through LLM products, although there are signs that knowledge among MPs around AI infrastructure and cloud-based systems is starting to grow.

The opportunity is there for businesses to educate political stakeholders from all parties on the economic opportunities that exist from AI and assuage some of the policy concerns. This report shows how to do it.

The threat and opportunity of AI looms over every Westminster debate

AI is becoming an increasingly prominent issue in UK politics. It sits behind a wide range of policy debates – from economic growth to public service reform – and is likely to play an increasingly important role in shaping the campaign environment come the next election.

However, responsibility for AI policy remains fragmented across government, spanning departments such as the Department for Science, Innovation and Technology, the Cabinet Office and the Treasury. Political engagement with AI is similarly uneven: Prime Ministers have periodically elevated the issue through major speeches, but sustained focus has been harder to maintain.

The different pro-AI arguments heard by MPs

To understand which arguments resonate most strongly with policymakers, a survey of 102 MPs was conducted, broadly reflecting the political composition of the House of Commons.

Using the same broad categories as in the public polling, each argument was broken down into more specific variations (Figure 3.1), allowing for a more granular understanding of which arguments resonate at Westminster.

Figure 3.1

Economic benefits	Societal benefits	Reassurance against risk
AI will boost **economic growth**, potentially adding significantly to GDP by the mid-2030s	AI will **simplify complex systems**, improving access to legal, financial and civic support	**Targeted rules** will apply to the highest-risk AI, with stricter testing and transparency
AI will raise worker productivity, supporting higher real **wages**	AI will **personalise learning**, build skills and reduce teachers' marking workloads	The **AI Safety Institute** tests advanced models to assess risks before deployment
AI will cut **public sector costs** by automating routine tasks and freeing staff time	AI will speed **NHS** diagnosis and triage and aid new treatments for cancer and dementia	The UK is leading **global AI safety cooperation** and shared safeguards
The UK could become a leading AI hub, **rivalling Silicon Valley**	AI will improve **energy efficiency** and support low-carbon technology adoption	Schools and public bodies are boosting **digital skills** so people can use AI safely
AI will give **small firms** affordable tools to scale and compete nationwide	AI will enhance UK **security** through stronger cyber-defence and threat detection	Though disruptive, AI is likely to augment **more jobs than it replaces**
AI will speed up **R&D** in key UK industries like life sciences and manufacturing	AI will support independent living for **older and disabled people**, including navigation and fall detection	AI decisions will keep a **human in the loop** under existing legal oversight

Shortened summaries presented, full text in the appendix.

The industry rightly sees growth as its strongest economic argument with politicians

When considering the economic arguments for AI, MPs tend to gravitate towards the impact on overall GDP growth (Figure 3.2). Compared to some of the other questions, technology professionals did relatively well at predicting this emphasis on growth (Figure 3.3).

Figure 3.2

Question | Below are some arguments that are sometimes made in favour of AI in relation to the UK economy. Which of the following do you think would be most persuasive to MPs?

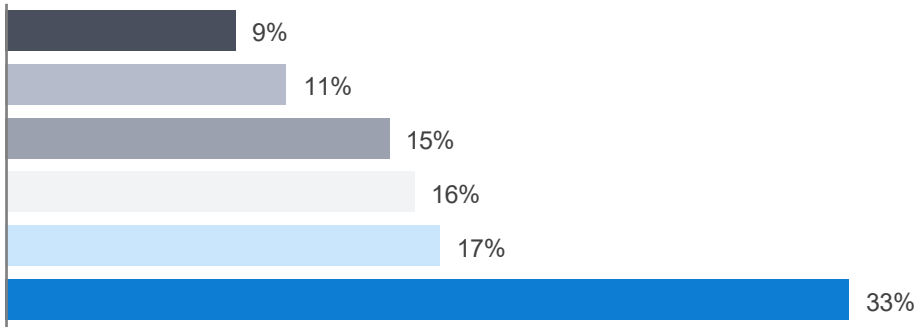
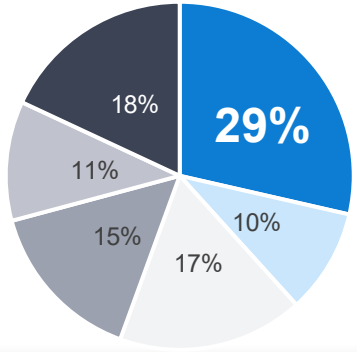


Figure 3.3

Question | Which argument do you think would be most likely to persuade MPs to support a bigger role for AI in the UK?



- AI will boost economic growth, potentially adding significantly to GDP by the mid-2030s
- AI will raise worker productivity, supporting higher real wages
- AI will cut public sector costs by automating routine tasks and freeing staff time
- AI will speed up R&D in key UK industries like life sciences and manufacturing
- The UK could become a leading AI hub, rivalling Silicon Valley
- AI will give small firms affordable tools to scale and compete nationwide

See appendix for full argument descriptions.

The tech sector misses the political power of the NHS

On societal arguments, however, the picture shifts significantly. As with the public, the argument that AI can improve the NHS stands out as the most persuasive by a considerable margin (Figure 3.4).

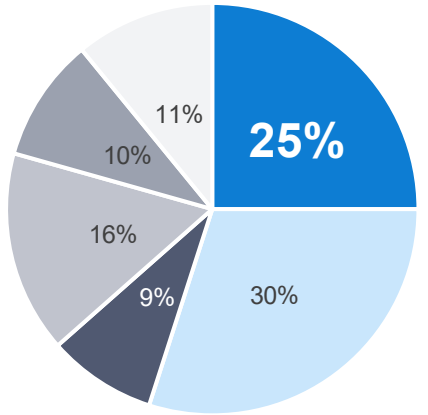
Despite this, only a quarter of technology professionals correctly identify this as the most resonant argument, with many instead expecting areas such as cyber-defence to carry greater weight (Figure 3.5).

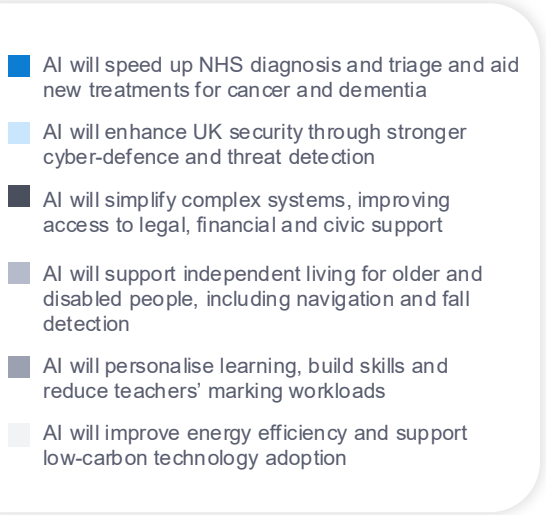
Figure 3.4

Question | Below are some arguments that are sometimes made in favour of AI in relation to UK society. Which of the following do you think would be most persuasive to MPs?

Figure 3.5

Question | Which argument do you think would be most likely to persuade MPs to support a bigger role for AI in the UK?





See appendix for full argument descriptions.

Long-term fundamentals matter more than policy detail

The analysis of reassurance arguments reveals a further disconnect. While technology professionals show little consensus on what reassures MPs, policymakers themselves are relatively clear (Figure 3.6).

Arguments that emphasise long-term fundamentals – such as maintaining human oversight ('humans in the loop') and the potential for a net increase in jobs – are more persuasive than those focussed on new policies or attempts to educate the public.

Once again, technology professionals struggle to identify these priorities, performing little better than chance (Figure 3.7).

Figure 3.6

Question | In response to some of the criticisms of AI, AI's advocates have offered different defences and reassurances, some of which are summarised below. Which of the following do you think would be most persuasive to MPs? Please select one argument only.

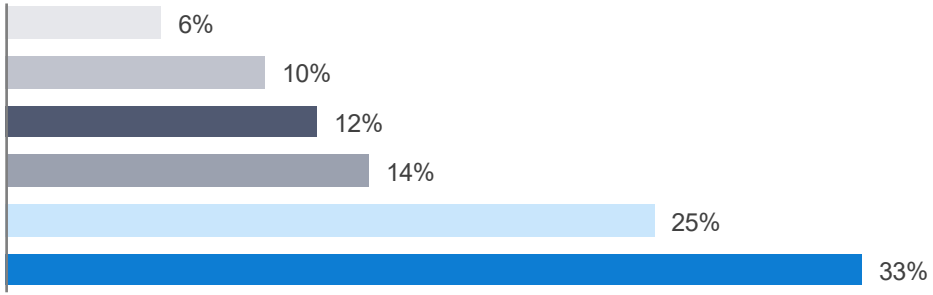
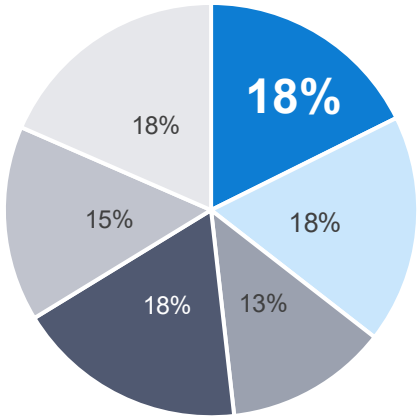


Figure 3.7

Question | Which argument do you think would be most likely to persuade MPs to support a bigger role for AI in the UK?



- Though disruptive, AI is likely to augment more jobs than it replaces
- AI decisions will keep a human in the loop under existing legal oversight
- Targeted rules will apply to the highest-risk AI, with stricter testing and transparency
- The UK is leading global AI safety cooperation and shared safeguards
- The AI Safety Institute tests advanced models to assess risks before deployment
- Schools and public bodies are boosting digital skills so people can use AI safely

See appendix for full argument descriptions.

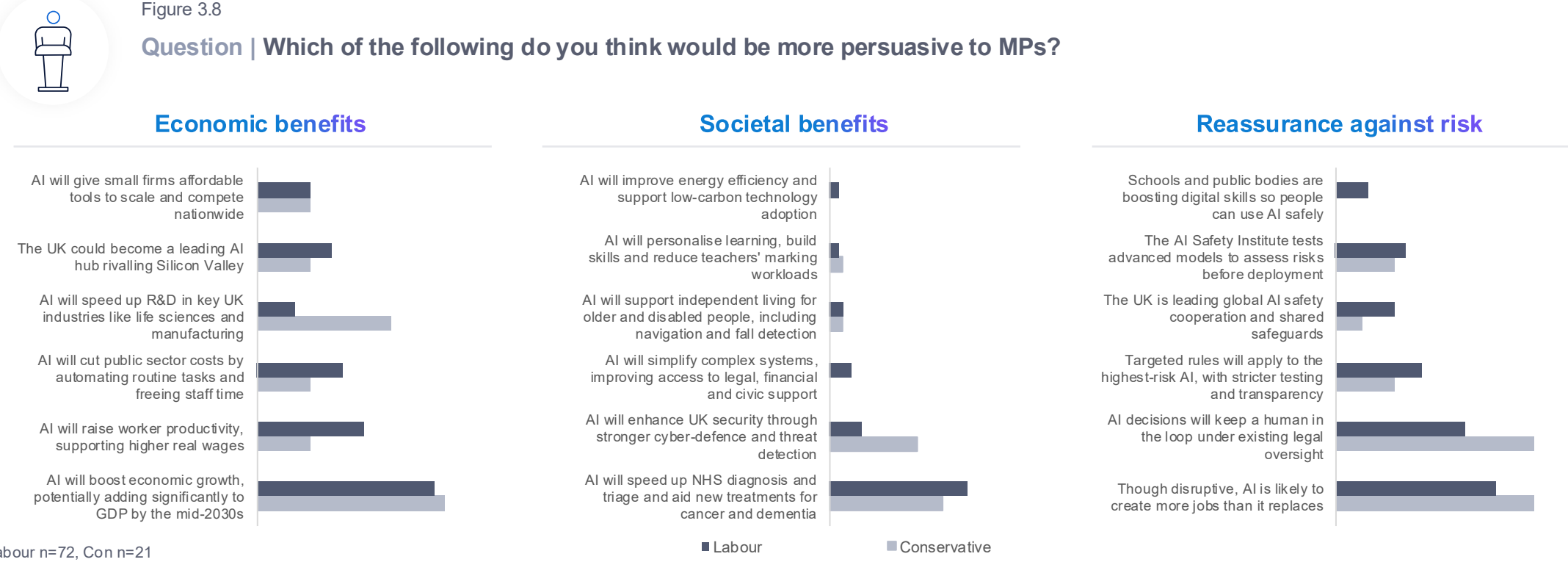
A consistent pattern across parties

Across economic, societal and reassurance arguments, the overall pattern is broadly consistent between Labour and Conservative MPs (Figure 3.8).

There are differences in emphasis – with Labour MPs more likely to highlight concerns around job losses – but the most effective arguments largely work across party lines.

Figure 3.8

Question | Which of the following do you think would be more persuasive to MPs?



Labour n=72, Con n=21

Section 06

Assessing the Sector's Instincts

The mood at the cutting edge

Ryan Cox

Global Head of Artificial Intelligence
Teneo

Walk into an AI lab in San Francisco or London and you will find an atmosphere humming with conviction.

The engineers working at the bleeding edge are quietly confident they are reshaping economies and institutions at pace. Yet step outside the lab and a sharp transatlantic divide in approach becomes clear.

In the U.S., the environment is competitive and closely tied to political priorities. The central question is one of dominance: whether the U.S. or China will lead the compute arms race and how foundation models will shape national security. In this context, tech giants are willing to invest billions to secure long-term advantage.

Mainland Europe presents a sharp contrast. The focus is on guardrails: building a risk-based regulatory framework centred on transparency and digital sovereignty.

Britain sits between these two models. Unable to match Silicon Valley's investment scale and less focussed on regulation than Brussels, the UK is positioning itself as a pragmatic middle ground. The wider technology sector is making a practical bet on adoption by using AI to improve services, reduce friction and lift productivity.

This creates a persistent gap between how AI is built and how it is received. Technology leaders are focussed on rapid innovation, while clients and the public prioritise reassurance, reliability and tangible outcomes. The narrative only lands when AI demonstrably improves everyday systems — reducing waiting times, streamlining services and delivering real-world value.

For organisations operating across these markets, the challenge is clear: translating technological capability into trusted, usable systems. The winners will be those who can turn raw digital intelligence into solutions that are governable, secure and genuinely useful.

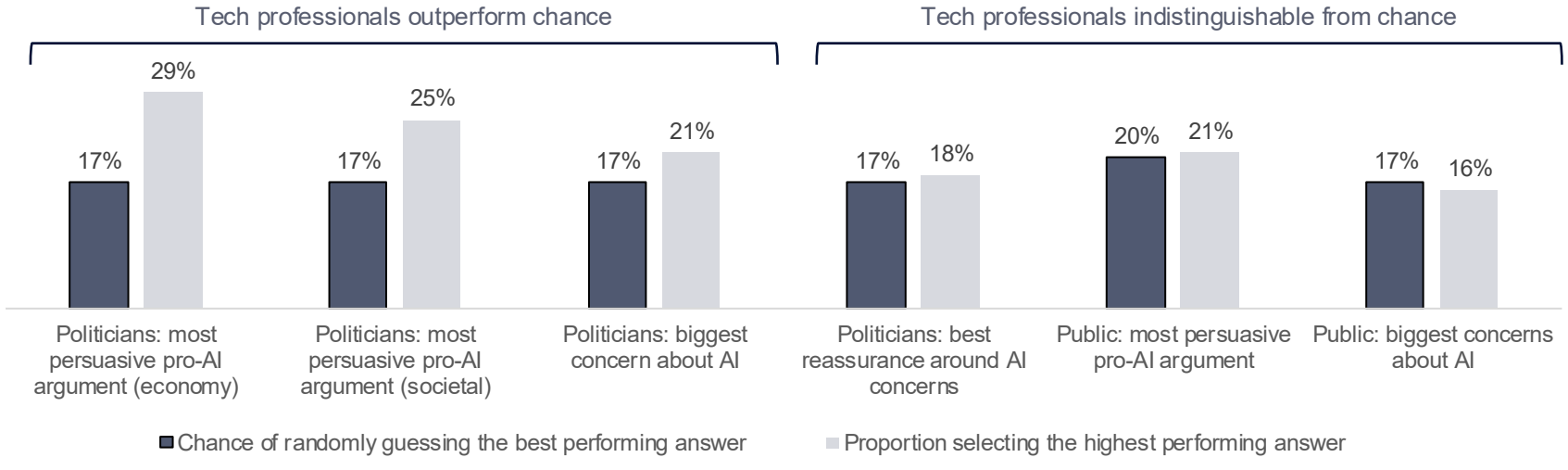
The tech sector is poorly calibrated to what persuades

A central objective of this research was to assess how accurately the technology sector understands what persuades the public and politicians. To test this, technology professionals were asked to complete a series of six prediction challenges, where they needed to predict what would be most persuasive, ranging from which pro-AI arguments would best land with the public, through to which concern was most resonant with MPs (Figure 4.1). In each of these tasks, participants were required to select a single answer, giving them a one-in-six chance of choosing the correct response at random on most questions, and a one-in-five chance on the question about what would best persuade the public.

Technology professionals performed best when assessing which pro-AI arguments would work with MPs. While only a minority were accurate – identifying economic growth and the NHS as the strongest arguments on economic and societal grounds – they were at least significantly better than chance. On three of the questions, technology workers were not statistically better at making predictions than chance – and on one question, they performed slightly worse than chance.

Figure 4.1

Proportions of technology professionals successfully selecting the most persuasive argument for MPs and the public



See appendix for statistical testing.

Accurate judgement is rare – and not improved by seniority

Looking across all six prediction tasks, very few technology professionals demonstrate consistently strong judgement in predicting the most persuasive arguments.

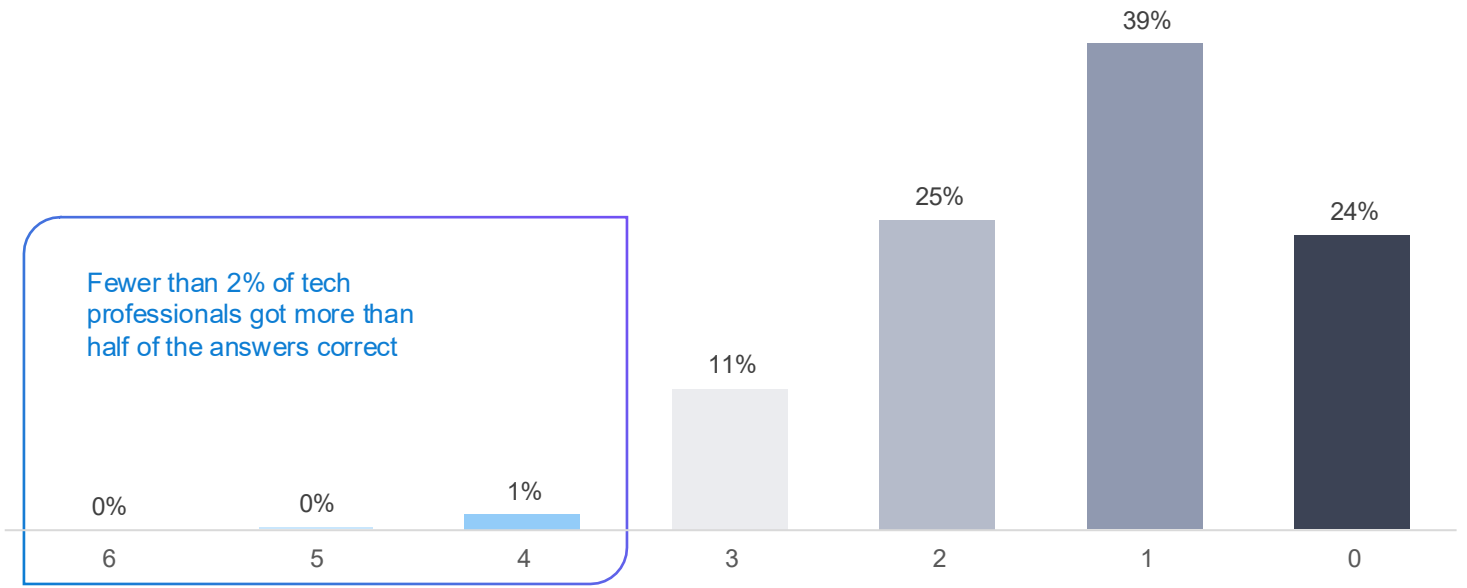
As shown in Figure 4.2:

- No participant answered all questions correctly
- Fewer than 2% correctly identified more than half of the answers
- Nearly a quarter failed to answer a single question correctly

Seniority does not appear to improve performance. In fact, more senior technology professionals are slightly less accurate in predicting what persuades (Figure 4.3).

Figure 4.2

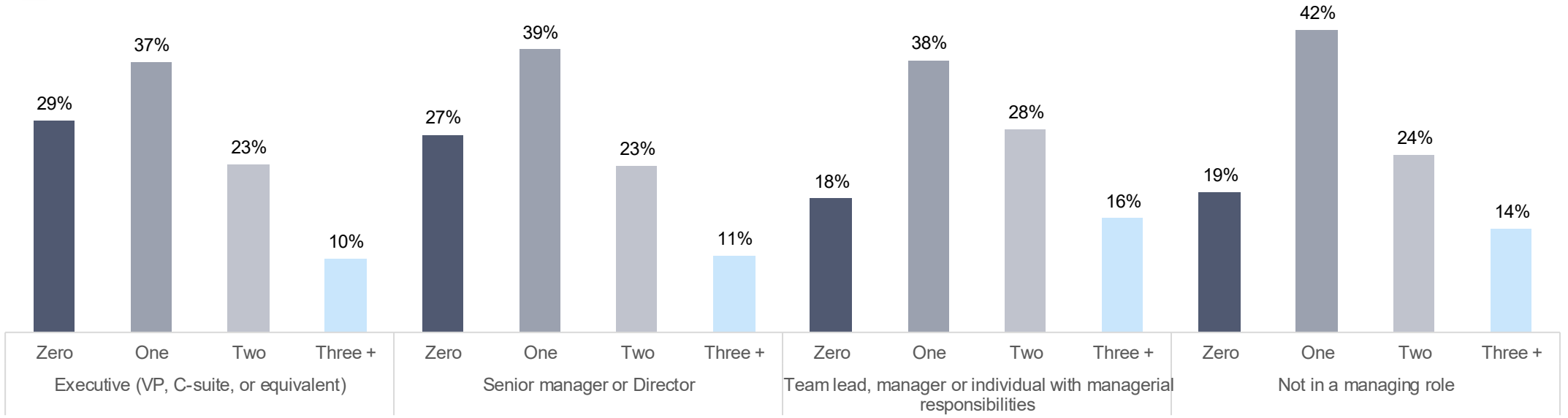
Proportions of technology professionals who successfully identify different numbers of the most persuasive arguments



Seniority does not appear to improve performance. In fact, more senior technology professionals are slightly less accurate in predicting what persuades.

Figure 4.3

Proportions of technology professionals who successfully identify different numbers of the most persuasive arguments (subdivided by role seniority)



Statistically comparing the mean response accuracy across levels finds that performance is significantly reduced as seniority increases: a one-way ANOVA showed that the number of correct answers differed significantly by role, $F(3, 500) = 2.795$, $p=.04$.

Why instinct fails: predictable cognitive biases

There are well-established psychological explanations for this pattern (Figure 4.4), which make it difficult for individuals to accurately anticipate how others think and respond.

This highlights a clear limitation of instinct-led decision-making. To be effective, organisations need systems that bring rigour and challenge to 'gut' judgements about what will persuade the public or political class.

Figure 4.4

Why our instincts on what will work are often wrong

'The curse of knowledge'	Once we know something, we struggle to imagine what it's like not to know it. That means we often form arguments that assume our audiences are much more informed about an issue, and up-to-speed with its tropes and nomenclature, than they really are. What feels concise and compelling internally often lands as abstract or confusing externally.
'The spotlight effect'	As individuals, we overestimate how much attention others are paying to us. We see that often applying to organisations too – assuming that our brand or business is more central to others' worldview than it really is. The result is that we can too easily start communicating about ourselves as if we are the main character, when the audience doesn't think we are.
'The false consensus effect'	People tend to assume that others share our views, priorities and interpretations more than they actually do. This leads to messaging that skips over points of disagreement or fails to address alternative viewpoints.
'Conjunction fallacy'	People overestimate how common something is if it fits a story or stereotype. So, for example, people can easily imagine the green voter who is also a vegan. But they might be tempted to think that most green-voters are vegans which, given the prevalence of veganism in the population, is actually unlikely. The result is that we create arguments aimed at stereotypes, rather than those with complex, sometimes contradictory, views.

Camerer, Loewenstein, & Weber, 1989; Gilovich & Savitsky, 1999; Ross, Greene, & House, 1977; Tversky & Kahneman, 1983

Winning capital in the AI race

James Macey White

Senior Managing Director
Teneo

AI is having a substantial impact on global capital markets.

For the perceived 'winners' in the race to date, we have seen strong share price performances and the potential to raise levels of capital never seen before. The challenge in securing those rewards is persuading investors on the value of proprietary data, reassuring them on the security of chip supply and distribution, and evidencing that AI is genuinely improving products and services.

The need to persuade with precision is critical. The industry is developing at lightning speed; the geopolitical backdrop is complicated to navigate and is impacting capital markets and the cost of capital required to continue to invest and be at the front of the pack. This isn't helped when many investors are generalists rather than sector specialists.

Predicting the future isn't straightforward at the best of times and we have seen the cost of that unpredictability in the impact on valuations of equities in the UK. With much of the foundational model work being done by American and Chinese companies, UK tech companies are more focussed on embedding AI into trusted workflows and data products. This is less capital intensive, but it comes with an increasing dependence on U.S. cloud and model providers. In February 2026 alone, billions of dollars in SaaS enterprise value evaporated, with some equities seeing share prices drop by 50%.

This was a global trend where the UK was particularly impacted. Almost without exception, the share price reactions of UK-listed tech stocks were harsh. Many UK tech stocks have very real barriers to entry which mitigate the threat and a clear strategy to utilise the power of the technology. Many are already doing it. The challenge and opportunity is to make sure that they persuade the markets accordingly.

Section 07

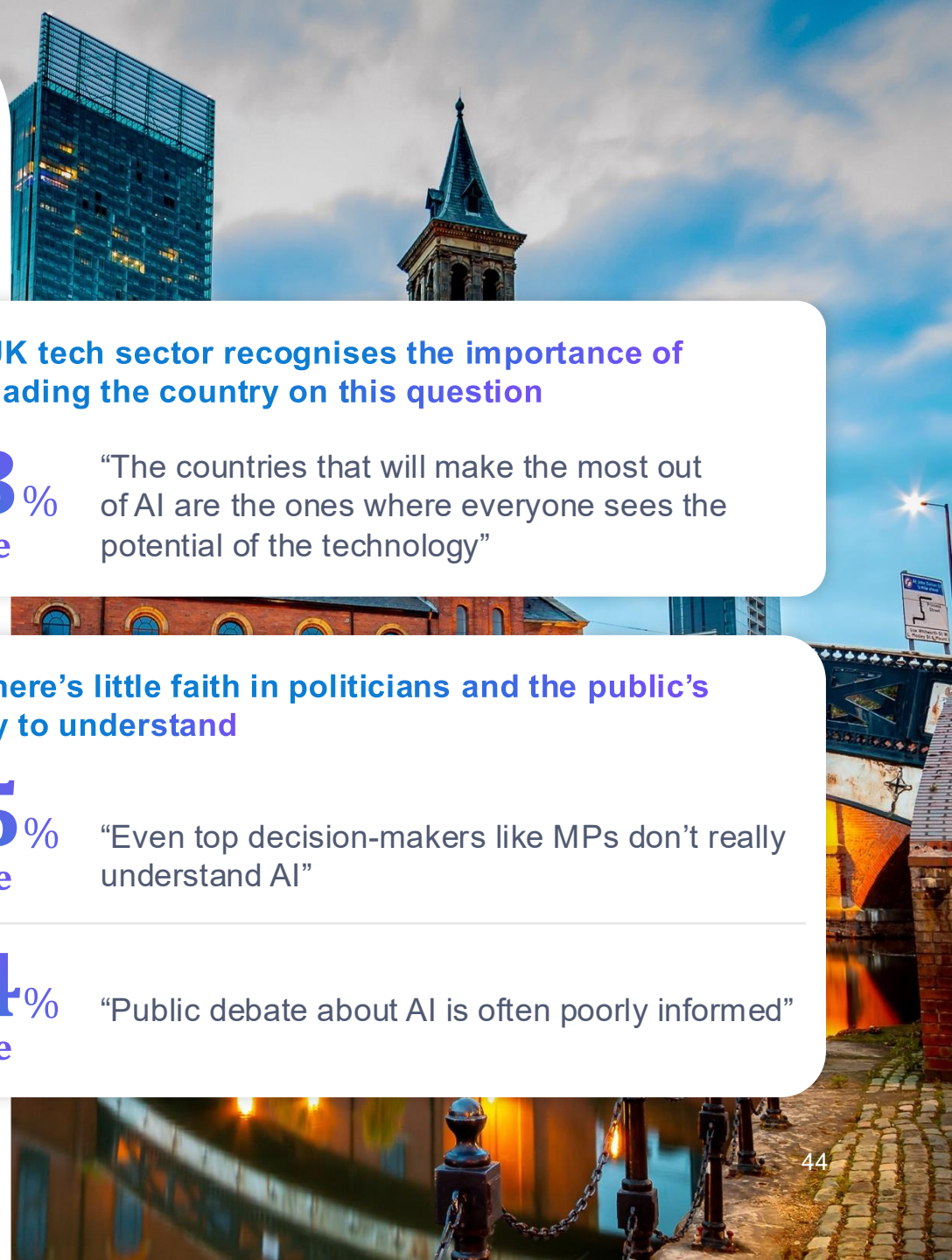
Closing the Gap

Where does the sector think it needs to go from here?

Britain may not be central to the investment plans of every major tech company, but UK tech professionals think this is an argument they must win.

63% agree that “countries that will make the most out of AI are the ones where everyone sees the potential of the technology.” That is not the position Britain finds itself in today, at least according to public opinion polling.

Across the tech sector, there is limited confidence in the ability of politicians and the public to fully understand the implications of AI. 75% agree that “even top decision-makers like MPs don’t really understand AI” and 64% agree “public debate about AI is often poorly informed.” Perhaps more ominously, 66% agree with the statement “people would be more worried about AI if they understood what it was capable of.”



The UK tech sector recognises the importance of persuading the country on this question

63% agree — “The countries that will make the most out of AI are the ones where everyone sees the potential of the technology”

But there’s little faith in politicians and the public’s ability to understand

75% agree — “Even top decision-makers like MPs don’t really understand AI”

64% agree — “Public debate about AI is often poorly informed”

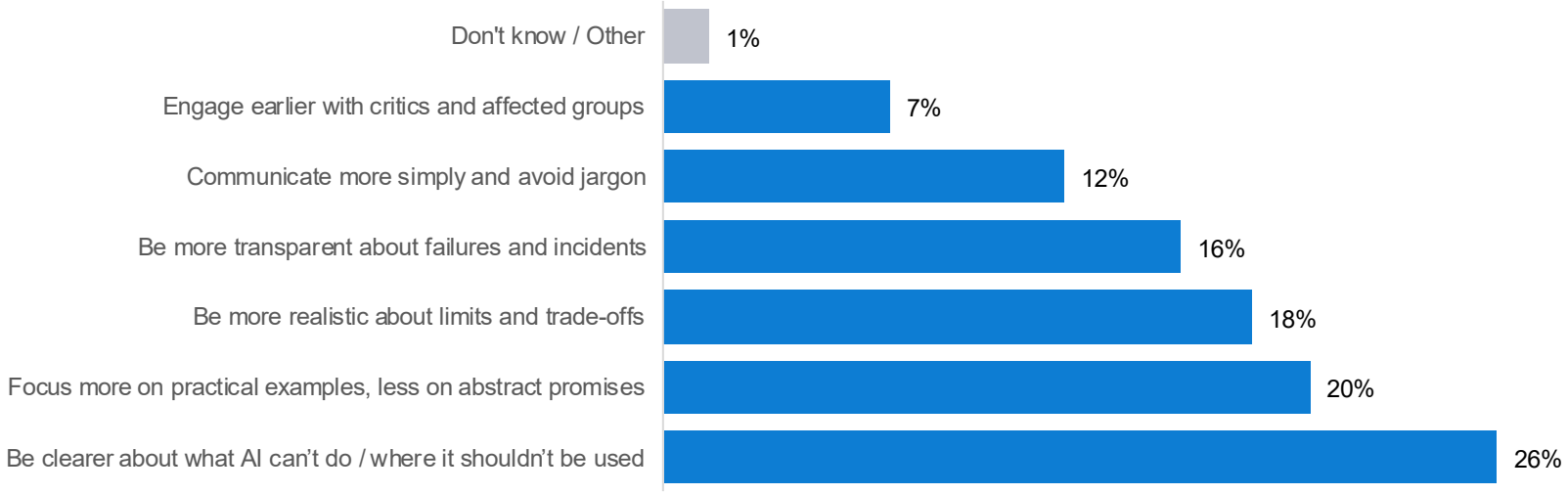
These perceptions shape how the tech sector approaches the challenge ahead. As shown in Figure 5.1, many technology professionals believe the answer lies in more cautious, transparent communication – emphasising limitations, acknowledging risks and avoiding overstatement. The findings in this report suggest that a purely defensive approach is unlikely to be sufficient to shift public opinion.

As one communications leader for one of the largest global technology companies observed, “one of the problems for AI is that it has no real spokespeople. There are ‘big beast’ tech CEOs but they all alienate some people and have some baggage.” If that’s true at a global level, it’s even more true within the UK.

This presents a clear opportunity. There is space for credible voices – across business, politics and technology – to shape this conversation in the UK and build a consensus on how our society and our public policy plots its own path alongside a fast-evolving technology. But how should they go about it according to this research?

Figure 5.1

Question | In your view, which of the following do businesses and individuals who argue in favour of AI need to do more of when communicating the benefits of AI to sceptics?



How can trust be won?

01

Recognise the tech sector's instincts will often be out-of-step with the public and politicians

If only one in 50 people in the tech sector can accurately predict what will persuade the public and politicians, then instinct alone is not a reliable guide. Organisations need to actively challenge internal assumptions, rather than defaulting to what feels logical from the inside.

02

Understand the scale of public and policy concerns

It is easy to assume the case for AI has already been made, given the pace of technological progress and adoption. However, scepticism remains widespread – and, if ignored, is likely to deepen rather than dissipate.

03

Recognise that concerns are centred on safety and security

The threat to jobs can dominate the coverage of AI and may yet be the defining policy question of the AI-era. However, as of today, in Westminster and the country at large, worries are much more concentrated on how AI can be managed safely, particularly in a world that already feels hostile and full of threats which might use AI to their advantage.

04

Understand who is persuadable

Around one in five adults in the UK remain undecided or ambivalent about AI. These "swing voters" broadly reflect the country politically, but are more likely to be older, less formally educated and from lower-income households.

05

See a better-functioning health service as the biggest potential winning territory

AI's potential to save Britain's treasured NHS gives AI-advocates a powerful, support-winning argument for the technology as a whole. It is, however, an argument that rests on how AI really delivers inside the health service.

06

Convince Westminster that AI is a route to growth and reassure them on the long-term fundamentals, not quick policy fixes

Demonstrating how AI can drive productivity and employment, while maintaining human oversight and long-term safeguards, is key to sustaining political support.

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Catie specialises in mixed-method research, combining qualitative and quantitative expertise to deliver insight-led reputational and communications strategy.

All data was collected in Q1 2026; Members of Parliament in January, technology professionals and the general public in February.

Huge thanks go to our off-the-record interviewees from inside the technology sector and across the AI debate who gave up their time to help shape our thinking. Finally, we would like to thank Amy Shields and Yasmin Pogson, researchers in Teneo's UK Strategy and Communications team, for their contribution to this work.

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Appendix

References

Deborah Mattinson: The Context for Britain Today

- 71% now believe the country is heading in the wrong direction (YouGov, page 2)
- They no longer trust politicians: the latest polling shows the lowest score for more than 40 years at 9% (Ipsos Veracity Index)
- Asked who they place confidence in to manage future AI, only 19% trust government, but at just 29% tech companies hardly fare better (Ipsos Public Trust in AI, page 25)

Figure 4.4

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Appendix

General Public Questionnaire Structure

Level 1
Age, gender, socio-economic background, political leaning

Level 2
Random allocation of potential arguments

Level 3
All respondents see the same questions exploring attitudes towards AI, message reaction, and potential drawbacks

Full Text Arguments used with the Public

AI will make Britain a global success story (126 words)

AI is changing how the world works and Britain can't afford to sit it out. Backers say AI will be a gamechanger: boosting growth, lifting productivity and sparking new industries that keep the UK prosperous and resilient. Rolled out at scale, they argue AI could add a substantial sum to the economy by the mid-2030s.

It could also turbocharge research in areas where the UK already leads, from life sciences to advanced manufacturing and high-tech. Faster development, smarter decisions and better products would sharpen Britain's edge and help UK firms take on global rivals. And instead of importing the next big tech breakthroughs, supporters say the UK could build them here, creating homegrown AI "household names" that grow, hire and scale in Britain over time.

AI will revolutionise our public services (144 words)

AI is increasingly being used to help public services do far more. In the NHS, AI will support faster diagnosis, help manage waiting lists and make it easier for staff to handle large amounts of patient information. It can also speed up the development of new treatments, including for cancer and dementia. Beyond health, AI could strengthen public safety too, by improving cyber-defences and helping detect criminal, terrorist and hostile state activity.

At a time of real strain, AI can improve the day-to-day efficiency of public services and free up resources for the frontline. It could help services share information and coordinate more smoothly, reducing delays and duplication across different parts of the system. By taking on routine administrative tasks, AI will allow staff like nurses or police officers to spend more time doing the things that only a trained professional can do.

Reassurance message (143 words)

Many people have concerns about the risks linked to AI. But these risks can be managed through clear rules and strong safeguards. There's a strong consensus in the UK that there should robust regulation of the most powerful and high-risk uses of AI and proper testing before new systems are widely rolled out. This way humans stay accountable for big decisions, even when AI is involved, and the same laws and democratic oversight still apply to everyone involved.

The UK is working with other countries on shared safety standards, because AI risks don't stop at borders. Alongside this, there is a focus on improving public understanding through education, digital skills and media literacy, so that people can understand, question and use AI with confidence. Taken together, these steps can help build confidence and ensure AI is made to work for everyone, securely.

AI can make us all better off (129 words)

AI has the potential to make ordinary people better off. By taking on admin and repetitive tasks, AI could help workers do more in less time. And when productivity rises, wages usually follow. Widespread AI use could lift real incomes over time and make day-to-day work less of a grind.

For small and medium sized business, AI will be a leveller, giving access to tools once reserved for large firms, from data analysis and marketing to back-office automation. This will help small business grow, create jobs and compete on equal footing. If these changes spread across the country, AI will deliver more job opportunities, better career prospects and more secure incomes, especially in parts of the UK where access to good-quality work has historically been harder to find.

AI will transform everyday life (139 words)

The promise of AI comes from its ability to improve everyday life, especially handling the jobs that we all find annoying. AI tools could make it easier to get what you need, from navigating public services and applying for support, to finding legal or financial advice. The idea is straightforward: less hassle, clearer guidance, and more time back, all with lower potential for stress when things go wrong. By making these things easier, AI could help households and businesses use energy more efficiently, cutting waste and reducing bills.

AI can be especially helpful for older people and those with disabilities. It can support blind and visually impaired users to get around, help people communicate and spot when someone has fallen or needs help at home. Taken together, these applications show how AI can deliver practical, everyday benefits that people can genuinely feel.

Full Text Arguments used with Members of Parliament

Economic Arguments for AI

- AI will improve economic growth, with government analysis suggesting that AI could add substantially to GDP by the mid-2030s.
- AI adoption will increase the productivity of British workers, which will ultimately drive higher real wages.
- AI will save money in the public sector by automating routine tasks and freeing up billions of pounds' worth of staff time for frontline work.
- The UK has the opportunity to become an AI hub that rivals Silicon Valley, with the next wave of AI-based household names potentially being based in the UK.
- AI will give small businesses big-firm capabilities, by making tools for data analysis, marketing and back-office automation cheap and accessible, helping smaller businesses, often outside London and the South East, to scale and compete.
- AI will accelerate the R&D processes in areas where the UK already has globally recognised businesses, from life sciences to advanced manufacturing, helping Britain to make the most of our competitive strengths.

Arguments against the use of AI

- As more tasks are automated, many middle-income jobs will be lost across the country, while most of the economic gains will be concentrated outside the UK.
- AI will allow governments and businesses to introduce mass-surveillance through technologies like facial recognition and, because of the way AI is trained, it is likely to embed and reproduce biases against women and ethnic minorities.
- AI tools are making it easier for anyone from fraudsters, to child-abusers, to hostile states to manipulate, scam, or disrupt our lives and communities.
- AI threatens our culture and creative industries, flooding the world with homogeneous AI-slop while making it impossible for artists, writers, musicians and others to make a living.
- AI technology is developing much faster than any regulations designed to control it, and ultimately it may do large-scale or irreversible harm in ways we cannot predict.
- Training and running AI models consume vast amounts of electricity and other resources, potentially reversing progress on tackling climate change.

Societal Arguments for AI

- AI will speed up diagnosis and triage in the NHS and support the development of new treatments in areas such as cancer and dementia.
- AI will help the public deal with complex and bureaucratic systems, making it easier to access legal and financial advice or participate in civic life.
- AI can tailor the learning experience, helping children and adults to learn new skills, as well as reducing the burden of marking on teachers.
- AI will help businesses and households use energy more efficiently and adopt new low-carbon technologies.
- AI will strengthen the UK's security and resilience, improving cyber-defences, threat analysis and early warnings against hostile states, and criminal or terrorist threats.
- AI will make it easier for older people and those with disabilities to live independent lives by, for example, helping blind and visually impaired users to navigate their surroundings or monitoring for signs that an elderly person has fallen at home.

Response to criticism arguments

- New, targeted rules will focus on the most powerful and high-risk AI, including stricter safety-testing and transparency requirements, so frontier systems do not get a free pass.
- The UK's AI Safety Institute is already testing advanced AI models, giving government independent evidence on the capabilities and risks of cutting-edge systems before they are widely deployed.
- The UK is leading global cooperation on AI safety, through agreements like the Bletchley Declaration, so major AI-producing countries share information and work to common safeguards around testing and risk management.
- The public will be better equipped to handle AI, because schools, colleges and public bodies are investing more in digital skills and media literacy so people can understand, question and use AI safely.
- While AI will cause some disruption, previous technological advancements have ultimately led to job creation, and independent research predicts that AI is more likely to augment jobs than automate them.
- While AI may accelerate some important decision-making processes, there will still be a 'human in the loop' who will be subject to the same legal rules and democratic oversight they face today.

Additional methodological details

Statistical tests for effects of stimulus in the Randomised Control Trial (Section 2)

In the RCT, participants were excluded if they gave a 'don't know' answer on the dependent variable (support for AI). Remaining participants were divided into two groups, those who somewhat or strongly supported greater AI use and those who opposed or were neutral. These gave the proportions shown in the relevant graph on slide Figure 2.4. Treatment group proportions were compared with the control group proportion, as set out in the table below. A similar exercise was run with the mean scores for the same dependent variable, but as this produced identical insights it is not reported.

Comparison	Control n	Treatment n	Control supporters	Treatment supporters	Proportion supportive (control)	Proportion supportive (treatment)	χ^2	df	p
Economic benefits: AI will make Britain a global success story	323	337	146	161	0.452	0.478	0.44	1	0.508
Economic benefits: AI can make us all better off	323	325	146	148	0.452	0.455	0.01	1	0.931
Societal benefits: AI will revolutionise our public services	323	329	146	183	0.452	0.556	7.08	1	0.00779
Societal benefits: AI will transform everyday life	323	319	146	166	0.452	0.52	3	1	0.0831
Reassurance against risk: AI can be developed and used safely and responsibly	323	331	146	150	0.452	0.453	0	1	0.976

Appendix

Additional methodological details

Statistical tests for accuracy testing (Section 4.1)

question	*n_correct*	*n_chance*	*n*	*x_squared*	*p_value*
Politicians: most persuasive pro-AI argument (economy)	144	84	504	50.58	0
Politicians: most persuasive pro-AI argument (societal)	126	84	504	24.6	0
Politicians: biggest concern about AI	104	84	504	5.43	0.0198
Politicians: best reassurance around AI concerns	89	84	504	0.29	0.5907
Public: most persuasive pro-AI argument	104	100.8	504	0.09	0.7637
Public: biggest concerns about AI	79	84	504	0.29	0.5907

Technology professional recruitment specification

The audience of 502 UK technology professionals was composed of the following profiles:

- Software / data / platform engineers (e.g., software engineer, data engineer, data scientist, ML engineer)
- Technical analysts or developers (e.g., analytics engineer, BI developer, automation)
- IT support or systems workers (e.g., IT support, helpdesk, systems or network administrator)
- IT or technical managers (e.g., IT manager, engineering manager)
- Professionals working within a technology company but not in an IT specific role (e.g., product manager, marketing, communications)

81% of the total sample had senior decision-making authority in one the following capacities:

- Team lead, manager or individual with managerial responsibilities
- Senior manager or Director
- Executive (VP, C Suite or equivalent)


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