Qualtrics XM institute™

Global Study: Consumer and Employee Attitudes Toward AI

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Executive Summary

KEY FINDINGS IN THIS REPORT

As part of Qualtrics' and Qualtrics XM Institute's Global Employee and Global Consumer Studies, we asked respondents a series of questions to understand their attitudes toward artificial intelligence (AI). These questions explored their concerns about AI as well as their comfort using the technology to complete common consumer and employee activities. We used their responses to gauge the global appetite for artificial intelligence. We learned that:

+ **Consumers in most countries think AI will have a positive impact on society.** Consumers in 20 of 26 countries think AI will positively affect society. Consumers are most optimistic in UAE, India, and Singapore with a net positive view of +57, +52, and +52, respectively. Meanwhile, 6 countries have a net negative view of AI, with the most negative outlook projected in Canada (-20), the UK (-16), and the US (-12).

+ **Consumers are most concerned about the lack of a human being to connect with.** On average, 48% of consumers are highly concerned about the *lack of a human being to connect with* if companies use AI to automate their interactions with customers. They are also highly concerned about the *poor quality of interactions* and *loss of jobs for employees*, with 45% of respondents citing each as a concern.

+ **There is no one-size-fits-all approach to AI.** Consumers from different countries expressed substantially different levels of comfort using AI to complete common tasks, with gaps up to 59 percentage points depending on the activity. Employees' interest in using AI to accomplish tasks also diverges widely across countries, differing by up to 48 percentage points.

+ **Appetite for AI support varies.** Consumers feel most comfortable using AI to *check the status of an order* (73%), a relatively light-touch task, compared to just 45% who are comfortable using AI to *get advice about a medical problem*. Meanwhile 61% of employees want *AI help with writing tasks*, and only 29% *would be interviewed for a new job/promotion by [an] AI bot*.

STUDY KEY FACTS

- Global consumer study/ global employee study
- Online panel
- Conducted in Q3
- 28,400 consumers/31,577 employees
- 26 countries/32 countries

Global Study: Consumer and Employee Sentiment on AI

STUDY OVERVIEW

Data for this report comes from a global consumer study that Qualtrics XM Institute conducted in the third quarter of 2023. Using an online survey, XM Institute collected data from 28,400 consumers across 26 countries/regions: Argentina, Australia, Brazil, Canada, China, Colombia, Finland, France, Germany, Hong Kong (China), India, Indonesia, Italy, Japan, Mexico, the Netherlands, New Zealand, the Philippines, Singapore, South Korea, Spain, Sweden, Thailand, the United Arab Emirates, the United Kingdom, and the United States.

To ensure that the data was reflective of the population within those countries, we set quotas for responses to match the gender, age, and income demographics of each country.

Data also comes from a global employee study that Qualtrics conducted in the third quarter of 2023. Using an online survey, Qualtrics collected data from 36,772 employees across 32 countries/regions: Argentina, Australia, Brazil, Canada, Chile, Colombia, France, Germany, Hong Kong (China), India, Indonesia, Italy, Japan, Malaysia, Mexico, the Netherlands, New Zealand, the Philippines, Poland, Singapore, South Africa, South Korea, Spain, Sweden, Switzerland, Republic of China (Taiwan), Thailand, Turkey, the United Arab Emirates, the United Kingdom (excluding the Republic of Ireland), the United States, and Vietnam.

For additional details on the sample makeup of these studies, please visit xminstitute.com/research/

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Methodology

Societal Impact of AI

KEY TAKEAWAYS

+ The United Arab Emirates thinks the most positively about the impact that AI will have on society, with a +57 % pt net positive impact, followed by India (+52 % pts).

+ Canadians feel most negatively about the impact AI will have on society (-20 % pts), followed by UK consumers (-16 % pts) and US consumers (-12 % pts).

ABOUT

This chart shows what impact consumers from each country think that AI will have on society, and the net impact (% *very positive* and *positive* minus % *very negative* and *negative*) each country's consumers believe AI will have.

What impact do you think artificial intelligence (AI) will have on society?

Legend: ■ Very positive impact ■ Positive impact ■ Neutral impact ■ Negative impact ■ Very negative impact

Country	Very positive	Positive	Neutral	Negative	Very negative	Net
UAE	22%	46%	21%	8%		+57
India	25%	40%	22%	11%		+52
Singapore	13%	50%	27%	10%		+52
Hong Kong	13%	48%	28%	8%		+50
Mexico	15%	42%	27%	13%		+41
Brazil	15%	42%	23%	16%		+36
China	10%	46%	38%			+50
Argentina	13%	43%	23%	15%	6%	+35
Thailand	14%	39%	35%	11%		+41
Indonesia	8%	41%	38%	11%		+37
Colombia	9%	40%	26%	20%	6%	+24
South Korea	7%	42%	40%	9%		+38
New Zealand	17%	32%	26%	17%	8%	+24
Finland	7%	36%	35%	20%		+21
Spain	6%	34%	28%	24%	8%	+8
Italy		34%	30%	25%	6%	+8
Germany	8%	31%	35%	21%		+13
Philippines	6%	31%	48%	13%		+22
Japan		33%	53%	9%		+26
Netherlands		31%	30%	27%	7%	+1
France		30%	27%	31%	8%	-6
Sweden		28%	32%	28%	9%	-6
US		25%	29%	29%	12%	-12
Australia		26%	31%	28%	12%	-11
UK		23%	31%	32%	10%	-16
Canada		23%	30%	32%	13%	-20

Concern with Companies AI Usage

KEY TAKEAWAYS

+ Indian consumers are most concerned about companies using AI, with 56% *very concerned* or *concerned.* Consumers in New Zealand follow behind, with 52% concerned.

+ Chinese consumers are the least concerned about companies using AI, at 13%, followed by Japanese (14%) and Italian (17%) consumers.
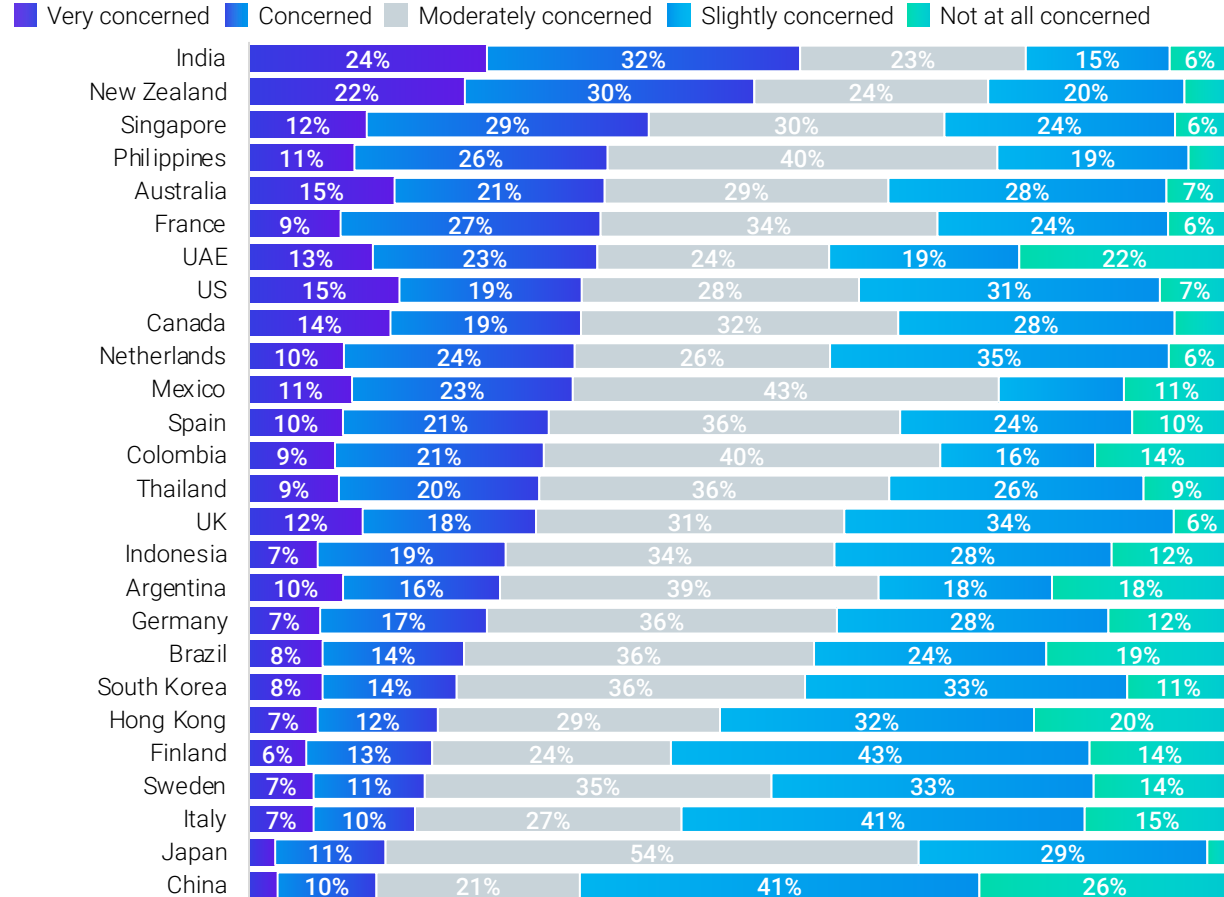
+ Canadians are split on their level of concern– an equal percentage of consumers are concerned as those unconcerned about companies using AI.

ABOUT

This chart shows how concerned consumers from each country are about companies using AI, and the net concern (% *very concerned* and *concerned* minus % *slightly* and *not at all concerned*) each country's consumers have..

How concerned are you about companies using artificial intelligence (AI)?

Legend: ■ Very concerned ■ Concerned ■ Moderately concerned ■ Slightly concerned ■ Not at all concerned

Country	Very concerned	Concerned	Moderately concerned	Slightly concerned	Not at all concerned
India	24%	32%	23%	15%	6%
New Zealand	22%	30%	24%	20%	
Singapore	12%	29%	30%	24%	6%
Philippines	11%	26%	40%	19%	
Australia	15%	21%	29%	28%	7%
France	9%	27%	34%	24%	6%
UAE	13%	23%	24%	19%	22%
US	15%	19%	28%	31%	7%
Canada	14%	19%	32%	28%	
Netherlands	10%	24%	26%	35%	6%
Mexico	11%	23%	43%		11%
Spain	10%	21%	36%	24%	10%
Colombia	9%	21%	40%	16%	14%
Thailand	9%	20%	36%	26%	9%
UK	12%	18%	31%	34%	6%
Indonesia	7%	19%	34%	28%	12%
Argentina	10%	16%	39%	18%	18%
Germany	7%	17%	36%	28%	12%
Brazil	8%	14%	36%	24%	19%
South Korea	8%	14%	36%	33%	11%
Hong Kong	7%	12%	29%	32%	20%
Finland	6%	13%	24%	43%	14%
Sweden	7%	11%	35%	33%	14%
Italy	7%	10%	27%	41%	15%
Japan	11%		54%	29%	
China	10%	21%		41%	26%

Base: 28,400 consumers across 26 countries
Source: Qualtrics XM Institute Q3 2023 Global Consumer Study
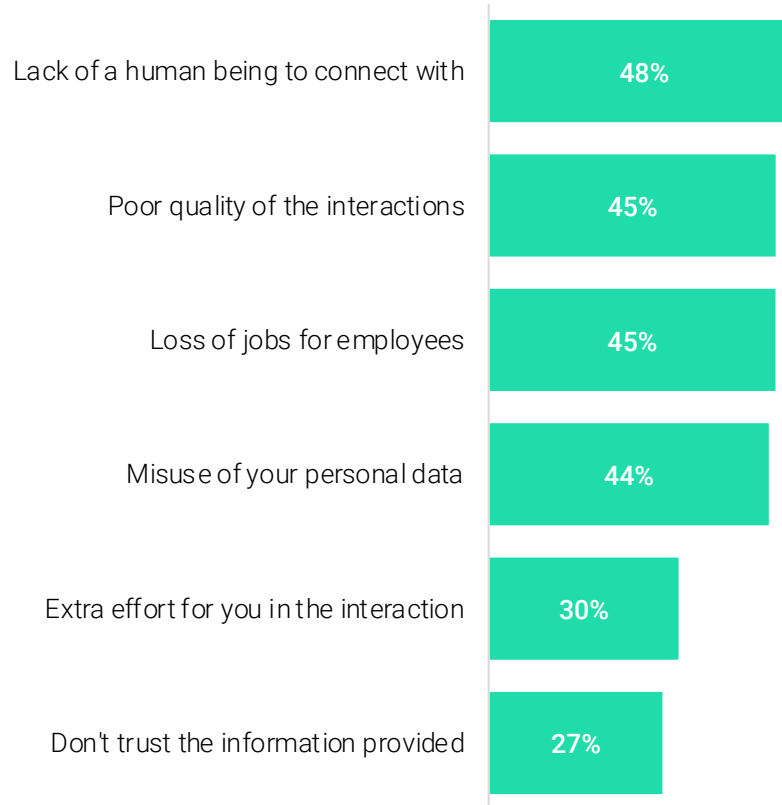
Consumer Concerns with AI

KEY TAKEAWAYS

+ Globally, consumers are most concerned about the lack of human being to connect with if companies use AI to automate their interactions with customers (48%).

+ Consumers are least frequently concerned about not trusting the information provided if companies automate their interactions (27%).

ABOUT

This chart shows, on average across all countries, the percentage of consumers that are concerned about each problem if companies use AI to automate their interactions with customers.

Which of the following problems are you most concerned about if companies use artificial intelligence (AI) to automate their interactions with customers?

Lack of a human being to connect with	48%
Poor quality of the interactions	45%
Loss of jobs for employees	45%
Misuse of your personal data	44%
Extra effort for you in the interaction	30%
Don't trust the information provided	27%

Base: 28,400 consumers across 26 countries
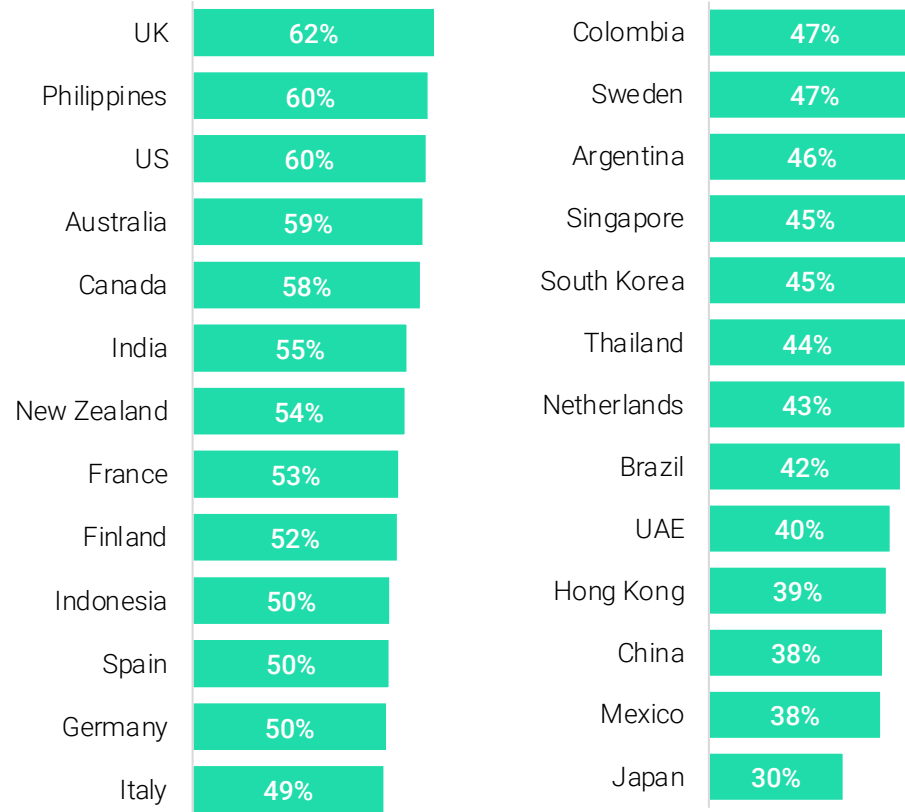Source: Qualtrics XM Institute Q3 2023 Global Consumer Study

Consumer AI Concerns: Human Connection

KEY TAKEAWAYS

+ UK consumers are the most concerned about the lack of a human being to connect with should companies automate their interactions with customers, at 62%, followed by Filipinos and Americans (60%).

+ There is a thirty-two percentage point difference in the level of concern expressed between UK consumers and Japanese consumers (30%).

ABOUT

This chart shows the percentage of consumers in each country that are concerned about the lack of a human being to connect with if companies use AI to automate their interactions with customers.

Percentage of consumers concerned about the
lack of a human being to connect with

Country	%		Country	%
UK	62%		Colombia	47%
Philippines	60%		Sweden	47%
US	60%		Argentina	46%
Australia	59%		Singapore	45%
Canada	58%		South Korea	45%
India	55%		Thailand	44%
New Zealand	54%		Netherlands	43%
France	53%		Brazil	42%
Finland	52%		UAE	40%
Indonesia	50%		Hong Kong	39%
Spain	50%		China	38%
Germany	50%		Mexico	38%
Italy	49%		Japan	30%

Consumer AI Concerns: Interaction Quality

KEY TAKEAWAYS

+ Fifty-eight percent of Canadian consumers are concerned about the *poor quality of interactions* if companies use AI to automate interactions with customers, the most acute rate of concern.

+ Emirati consumers are the least concerned (26%) about interaction quality being poor if companies use AI to automate interactions.
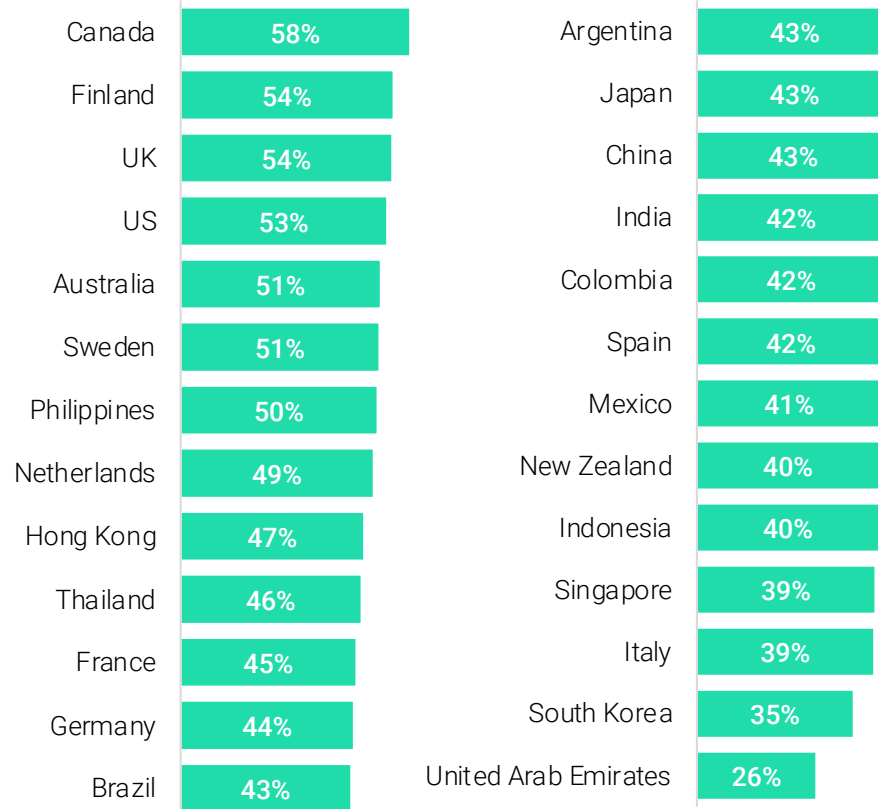
ABOUT

This chart shows the percentage of consumers in each country that are concerned about poor quality of interactions if companies use AI to automate their interactions with customers.

Percentage of consumers concerned about the
poor quality of interactions

Country	%		Country	%
Canada	58%		Argentina	43%
Finland	54%		Japan	43%
UK	54%		China	43%
US	53%		India	42%
Australia	51%		Colombia	42%
Sweden	51%		Spain	42%
Philippines	50%		Mexico	41%
Netherlands	49%		New Zealand	40%
Hong Kong	47%		Indonesia	40%
Thailand	46%		Singapore	39%
France	45%		Italy	39%
Germany	44%		South Korea	35%
Brazil	43%		United Arab Emirates	26%

Base: 28,400 consumers across 26 countries
Source: Qualtrics XM Institute Q3 2023 Global Consumer Study
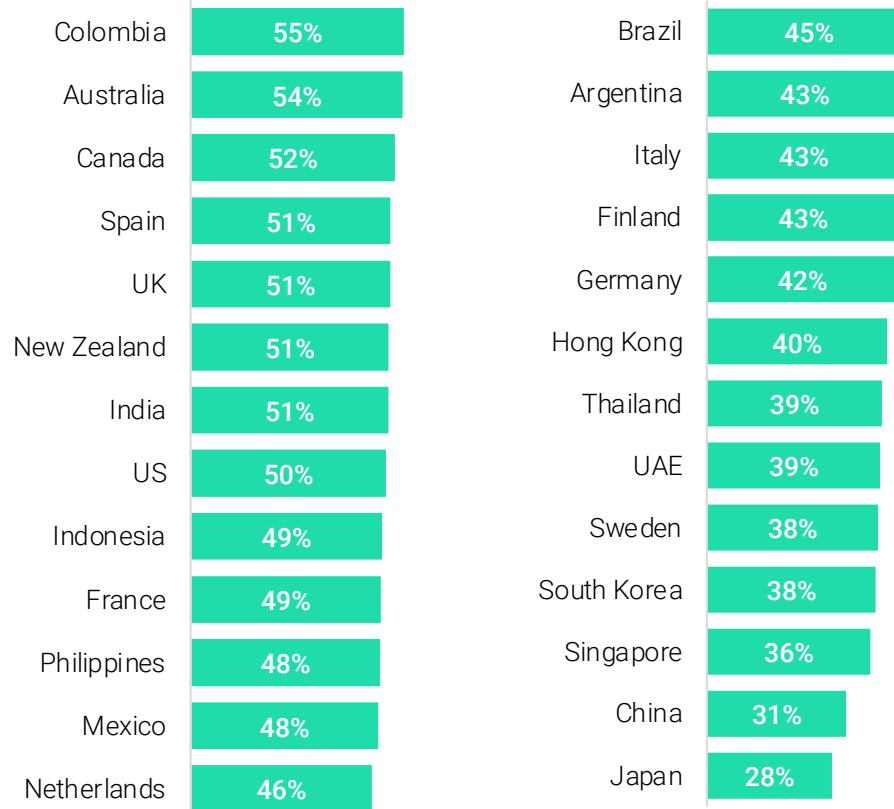
Consumer AI Concerns: Job Loss

KEY TAKEAWAYS

+ Fifty-five percent of Colombian consumers expressed concern about a *loss of jobs for employees* if companies use AI to automate interactions with customers, the most across all countries. Australian (54%) and Canadian (52%) consumers follow close behind.

+ Japanese (28%) and Chinese (31%) consumers were least likely to say they were concerned about the *loss of jobs for employees*.

ABOUT

This chart shows the percentage of consumers in each country that are concerned about loss of jobs for employees if companies use AI to automate their interactions with customers.

Percentage of consumers concerned about *loss of jobs for employees*

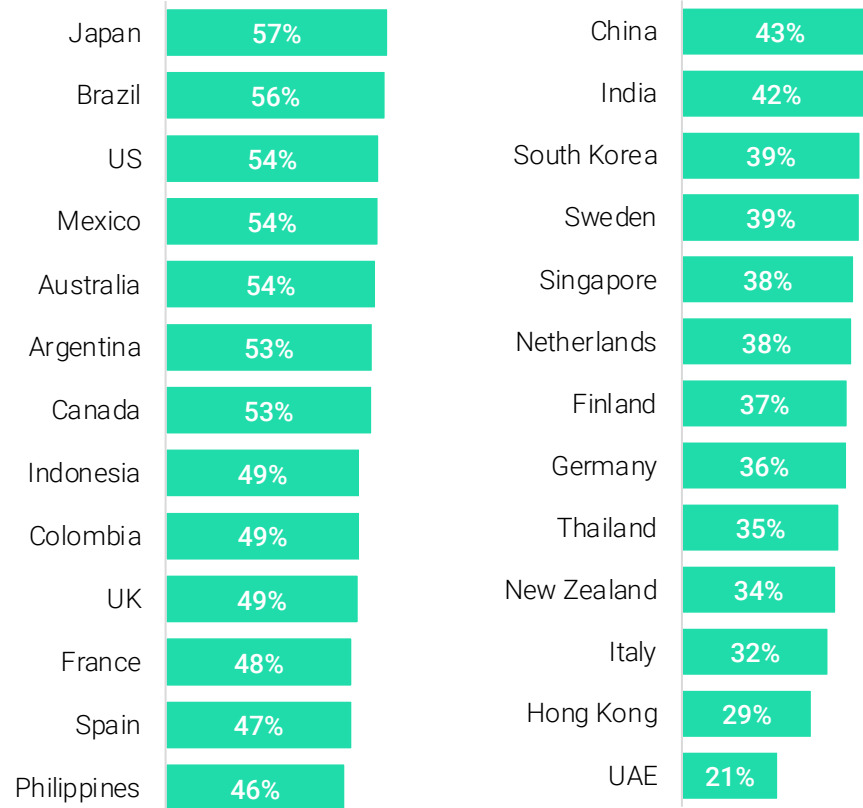| Country	%		Country	%
Colombia	55%		Brazil	45%
Australia	54%		Argentina	43%
Canada	52%		Italy	43%
Spain	51%		Finland	43%
UK	51%		Germany	42%
New Zealand	51%		Hong Kong	40%
India	51%		Thailand	39%
US	50%		UAE	39%
Indonesia	49%		Sweden	38%
France	49%		South Korea	38%
Philippines	48%		Singapore	36%
Mexico	48%		China	31%
Netherlands	46%		Japan	28%

Consumer AI Concerns: Misuse of Data

KEY TAKEAWAYS

+ At least one-third of consumers are concerned about *misuse of [their] personal data* if companies automate interactions with customers using AI in all countries/regions except for Italy, Hong Kong, and the UAE.

+ Japanese consumers are the most concerned about misuse of personal data, at 57%.

ABOUT

This chart shows the percentage of consumers in each country that are concerned about misuse of [their] personal data if companies use AI to automate their interactions with customers.

Percentage of consumers concerned about *misuse of [their] personal data*

Country	%		Country	%
Japan	57%		China	43%
Brazil	56%		India	42%
US	54%		South Korea	39%
Mexico	54%		Sweden	39%
Australia	54%		Singapore	38%
Argentina	53%		Netherlands	38%
Canada	53%		Finland	37%
Indonesia	49%		Germany	36%
Colombia	49%		Thailand	35%
UK	49%		New Zealand	34%
France	48%		Italy	32%
Spain	47%		Hong Kong	29%
Philippines	46%		UAE	21%

Base: 28,400 consumers across 26 countries
Source: Qualtrics XM Institute Q3 2023 Global Consumer Study

Consumer AI Concerns: Effort Required

KEY TAKEAWAYS

+ Indian consumers are the most concerned about the extra effort they'd have to put in if companies automate their interactions with customers using AI, at 41%, followed by South Koreans (39%).

+ Argentinian and Colombian consumers are the least concerned about extra effort being required should companies automate their customer interactions (20%).
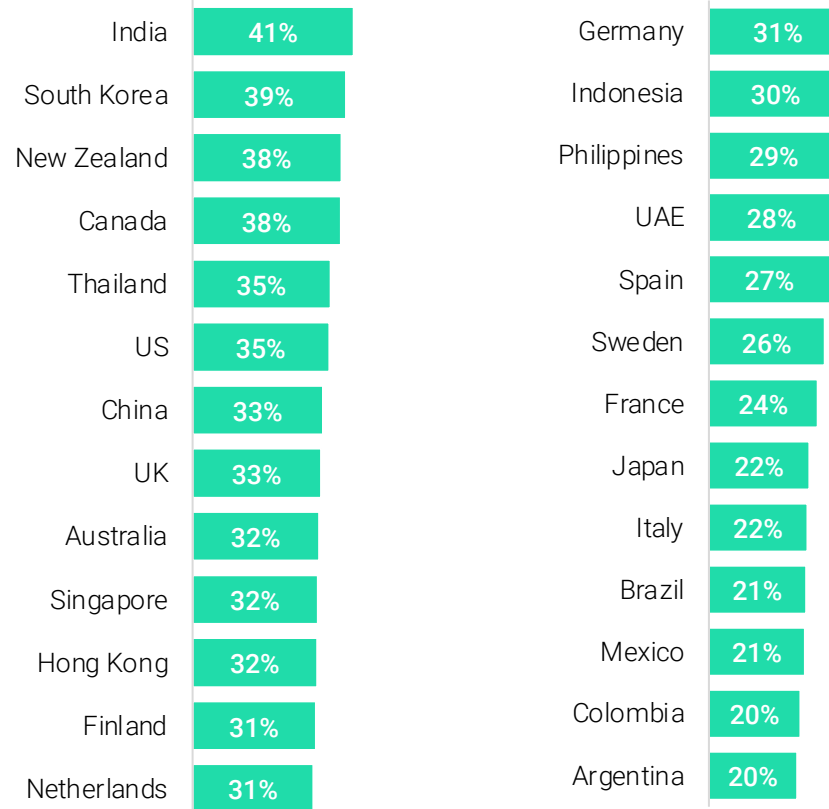
ABOUT

This chart shows the percentage of consumers in each country that are concerned about extra effort for [them] in the interaction if companies use AI to automate their interactions with customers.

Percentage of consumers concerned about
extra effort for [them] in the interaction

Country	%		Country	%
India	41%		Germany	31%
South Korea	39%		Indonesia	30%
New Zealand	38%		Philippines	29%
Canada	38%		UAE	28%
Thailand	35%		Spain	27%
US	35%		Sweden	26%
China	33%		France	24%
UK	33%		Japan	22%
Australia	32%		Italy	22%
Singapore	32%		Brazil	21%
Hong Kong	32%		Mexico	21%
Finland	31%		Colombia	20%
Netherlands	31%		Argentina	20%

Base: 28,400 consumers across 26 countries
Source: Qualtrics XM Institute Q3 2023 Global Consumer Study

Consumer AI Concerns: Trust

KEY TAKEAWAYS

+ Canadian consumers are most frequently concerned (43%) with being able to trust the information provided should companies automate their interactions using AI, followed by Australian (42%) and American (40%) consumers.

+ There is a 31 % pt gap between the level of concern expressed by Canadian consumers and Indonesian consumers over their ability to trust the information companies' AI automations may provide.
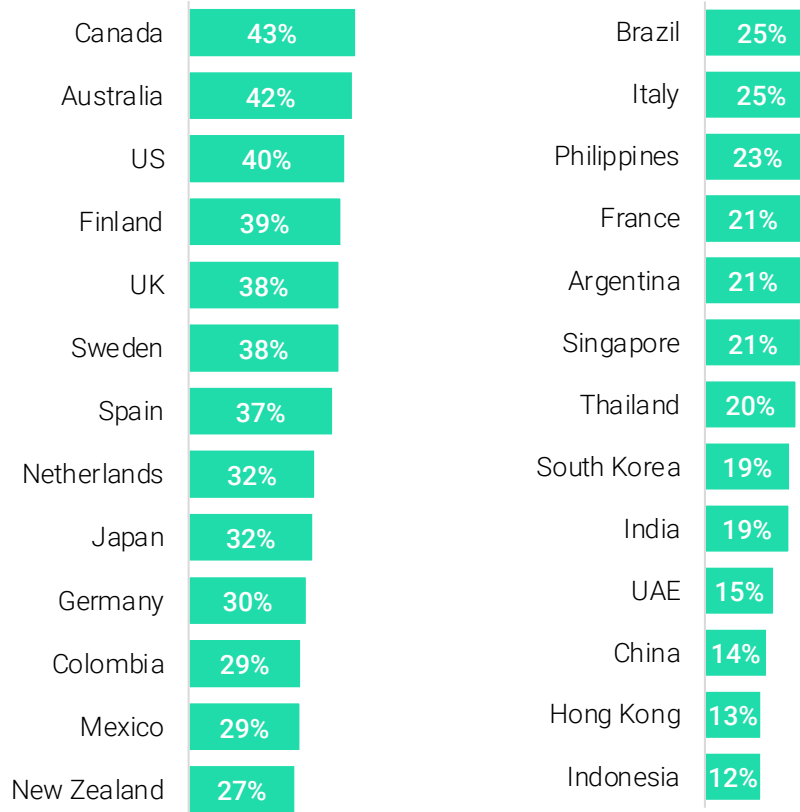
ABOUT

This chart shows the percentage of consumers in each country that are concerned about not trusting the information provided if companies use AI to automate their interactions with customers.

Percentage of consumers that *don't trust the information provided*

Country	%		Country	%
Canada	43%		Brazil	25%
Australia	42%		Italy	25%
US	40%		Philippines	23%
Finland	39%		France	21%
UK	38%		Argentina	21%
Sweden	38%		Singapore	21%
Spain	37%		Thailand	20%
Netherlands	32%		South Korea	19%
Japan	32%		India	19%
Germany	30%		UAE	15%
Colombia	29%		China	14%
Mexico	29%		Hong Kong	13%
New Zealand	27%		Indonesia	12%

Base: 28,400 consumers across 26 countries
Source: Qualtrics XM Institute Q3 2023 Global Consumer Study
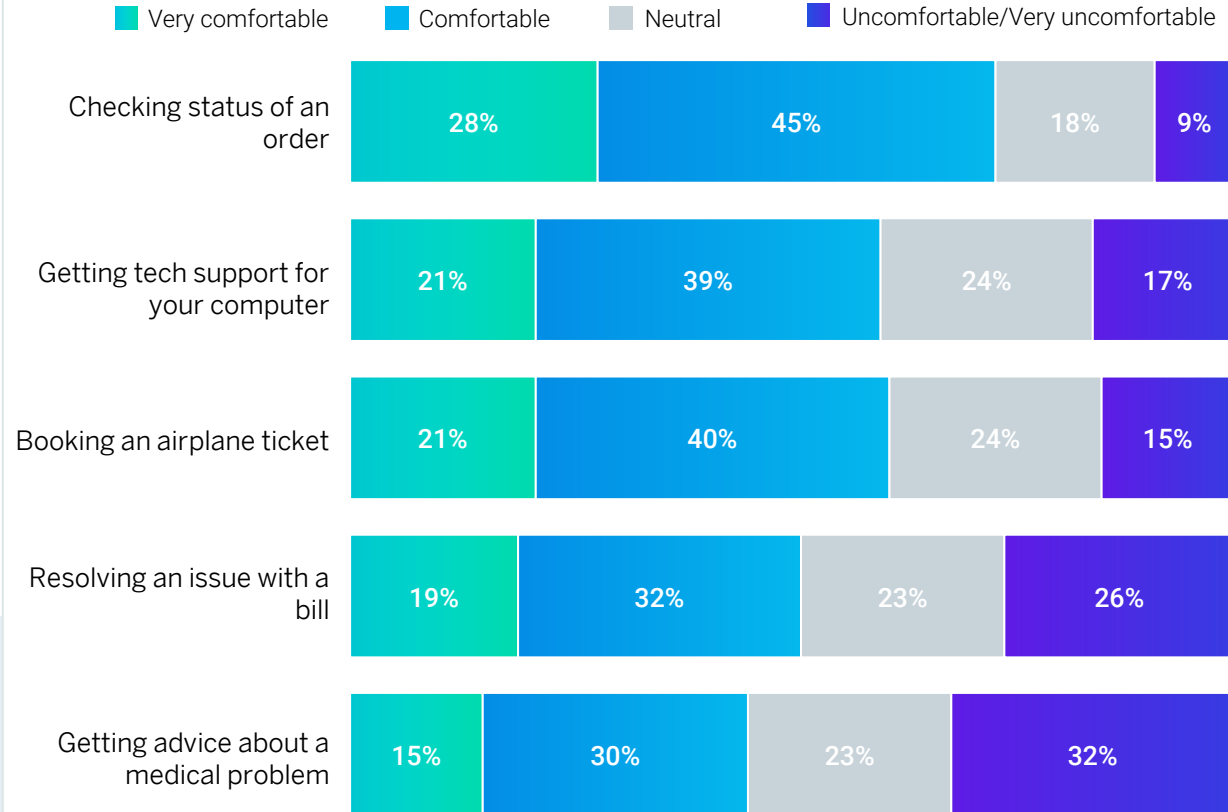
Consumer Comfort with AI: by Activity

KEY TAKEAWAYS

+ Across all countries, consumers expressed the greatest comfort interacting with an organization's AI to *check the status of an order,* followed by *getting tech support for [their] computer.*

+ Thirty-two percent of consumers expressed discomfort interacting with an organization's AI to *get advice about a medical problem*, the highest level across all five common activities.

ABOUT

This chart shows, on average across all countries, how comfortable consumers are interacting with an organization's AI system to accomplish each of five interactions.

How comfortable would you be interacting with an organization's artificial intelligence (AI) system to accomplish the following interactions?

■ Very comfortable   ■ Comfortable   ■ Neutral   ■ Uncomfortable/Very uncomfortable

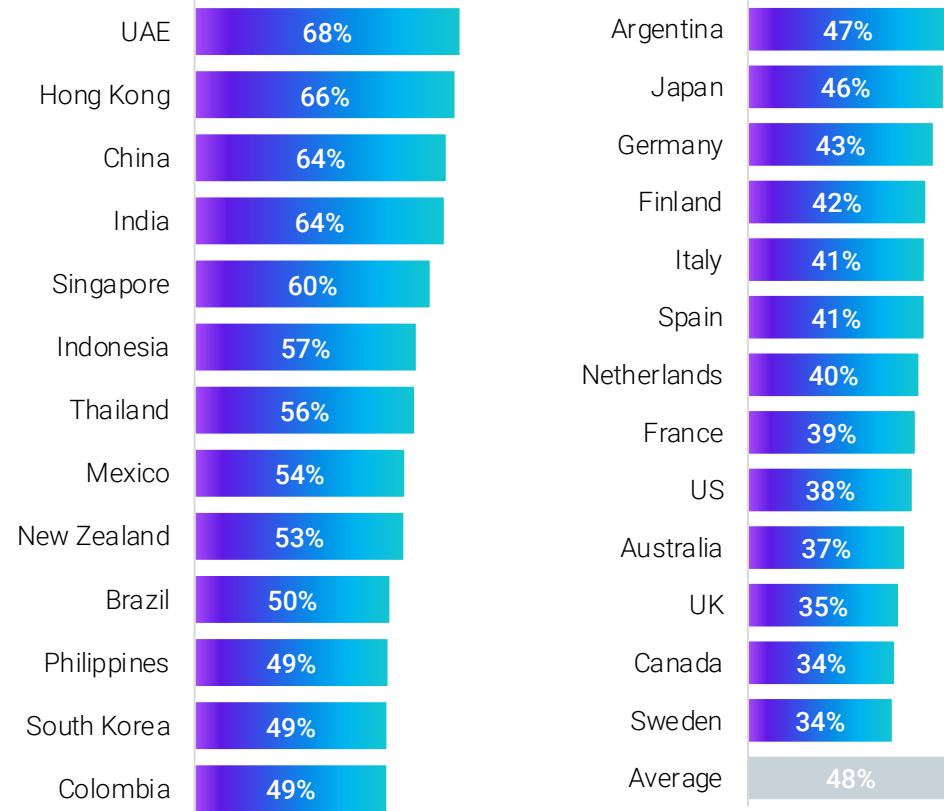| Activity	Very comfortable	Comfortable	Neutral	Uncomfortable/Very uncomfortable
Checking status of an order	28%	45%	18%	9%
Getting tech support for your computer	21%	39%	24%	17%
Booking an airplane ticket	21%	40%	24%	15%
Resolving an issue with a bill	19%	32%	23%	26%
Getting advice about a medical problem	15%	30%	23%	32%

Consumer Comfort with AI: Overall

KEY TAKEAWAYS

+ Globally, on average across all activities, 48% of consumers said they would be comfortable using an organization's AI.

+ Sixty-eight percent of Emirati consumers are comfortable completing activities using an organization's AI system, 2 times the level of comfort expressed by Canadian and Swedish consumers.

ABOUT

This chart shows the percentage of consumers on average from each country that are comfortable interacting with an organization's AI system to complete five common interactions.

Comfort with AI across 5 common activities
(Average *comfortable* or *very comfortable*)

Country	%		Country	%
UAE	68%		Argentina	47%
Hong Kong	66%		Japan	46%
China	64%		Germany	43%
India	64%		Finland	42%
Singapore	60%		Italy	41%
Indonesia	57%		Spain	41%
Thailand	56%		Netherlands	40%
Mexico	54%		France	39%
New Zealand	53%		US	38%
Brazil	50%		Australia	37%
Philippines	49%		UK	35%
South Korea	49%		Canada	34%
Colombia	49%		Sweden	34%
			Average	48%

Base: 28,400 consumers across 26 countries
Source: Qualtrics XM Institute Q3 2023 Global Consumer Study
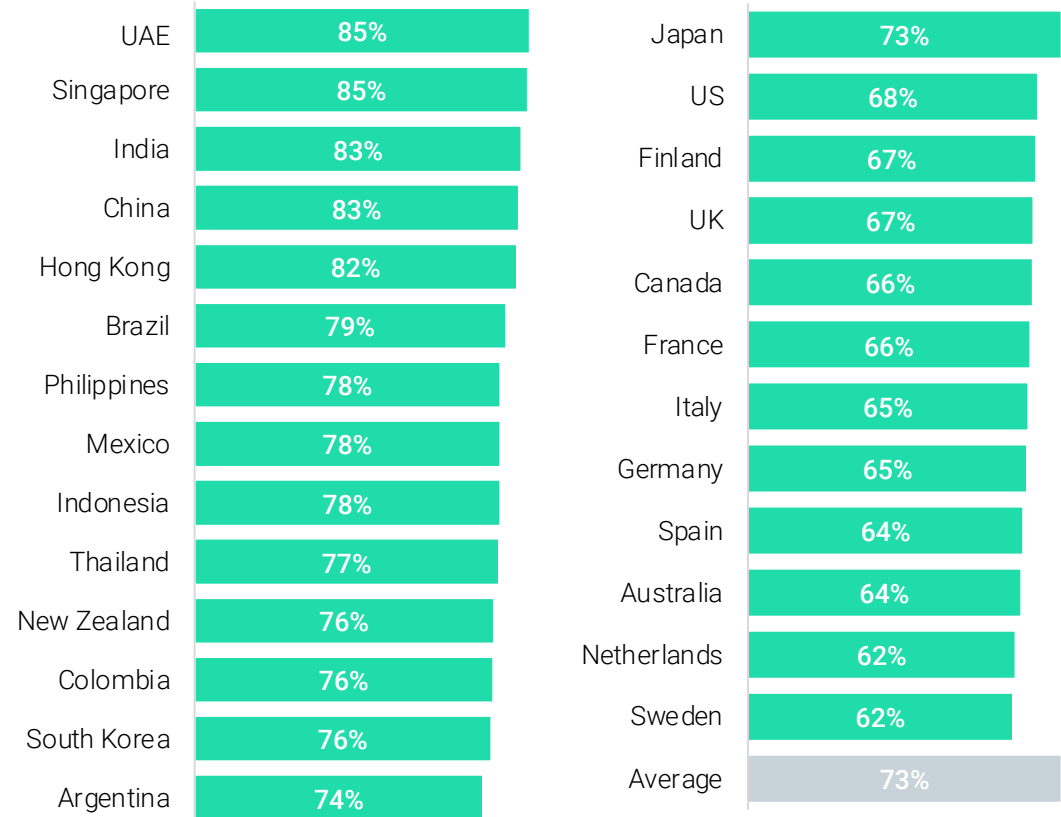
Consumer Comfort with AI: Order Status

KEY TAKEAWAYS

+ Emirati and Singaporean consumers most frequently said they would be comfortable using AI to get the status of an order, with 85% comfortable with this activity. Meanwhile, 62% of Swedish and Dutch consumers say the same.

ABOUT

This chart shows the percentage of consumers from each country that are comfortable interaction with an organization's AI system to get the status of an order.

How comfortable would you be interacting with an organization's AI system to accomplish the following interaction: *Getting status of an order*
(Percentage *comfortable* or *very comfortable*)

Country	%		Country	%
UAE	85%		Japan	73%
Singapore	85%		US	68%
India	83%		Finland	67%
China	83%		UK	67%
Hong Kong	82%		Canada	66%
Brazil	79%		France	66%
Philippines	78%		Italy	65%
Mexico	78%		Germany	65%
Indonesia	78%		Spain	64%
Thailand	77%		Australia	64%
New Zealand	76%		Netherlands	62%
Colombia	76%		Sweden	62%
South Korea	76%		Average	73%
Argentina	74%			

Base: 28,400 consumers across 26 countries
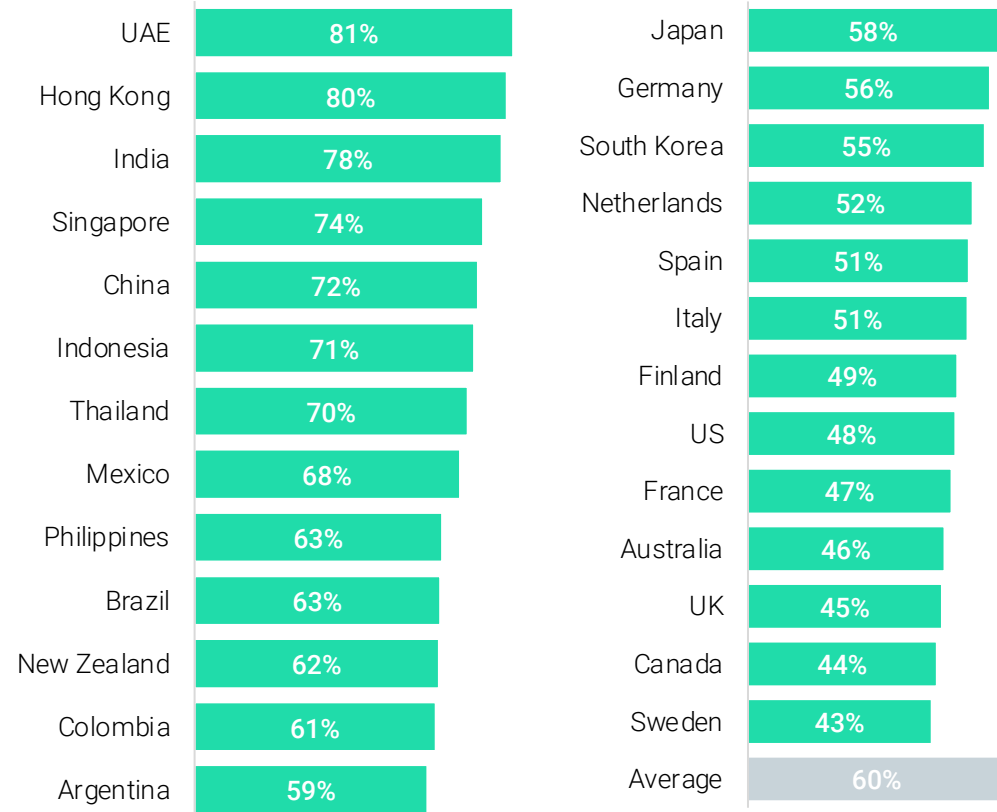Source: Qualtrics XM Institute Q3 2023 Global Consumer Study

Consumer Comfort with AI: Tech Support

KEY TAKEAWAYS

+ More than three-quarters of consumers in the UAE, Hong Kong, and India say that they would be comfortable getting tech support for their computer by interacting with an organization's AI.

+ Under half of Finnish, American, Australian, UK, Canadian, and Swedish consumers would be comfortable doing this activity by interaction with an organization's AI.

ABOUT

This chart shows the percentage of consumers from each country that are comfortable interacting with an organization's AI system to get tech support for [their] computer.

How comfortable would you be interacting with an organization's AI system to accomplish the following interaction: *Getting tech support for your computer*
(Percentage *comfortable* or *very comfortable*)

Country	%		Country	%
UAE	81%		Japan	58%
Hong Kong	80%		Germany	56%
India	78%		South Korea	55%
Singapore	74%		Netherlands	52%
China	72%		Spain	51%
Indonesia	71%		Italy	51%
Thailand	70%		Finland	49%
Mexico	68%		US	48%
Philippines	63%		France	47%
Brazil	63%		Australia	46%
New Zealand	62%		UK	45%
Colombia	61%		Canada	44%
Argentina	59%		Sweden	43%
			Average	60%

Base: 28,400 consumers across 26 countries
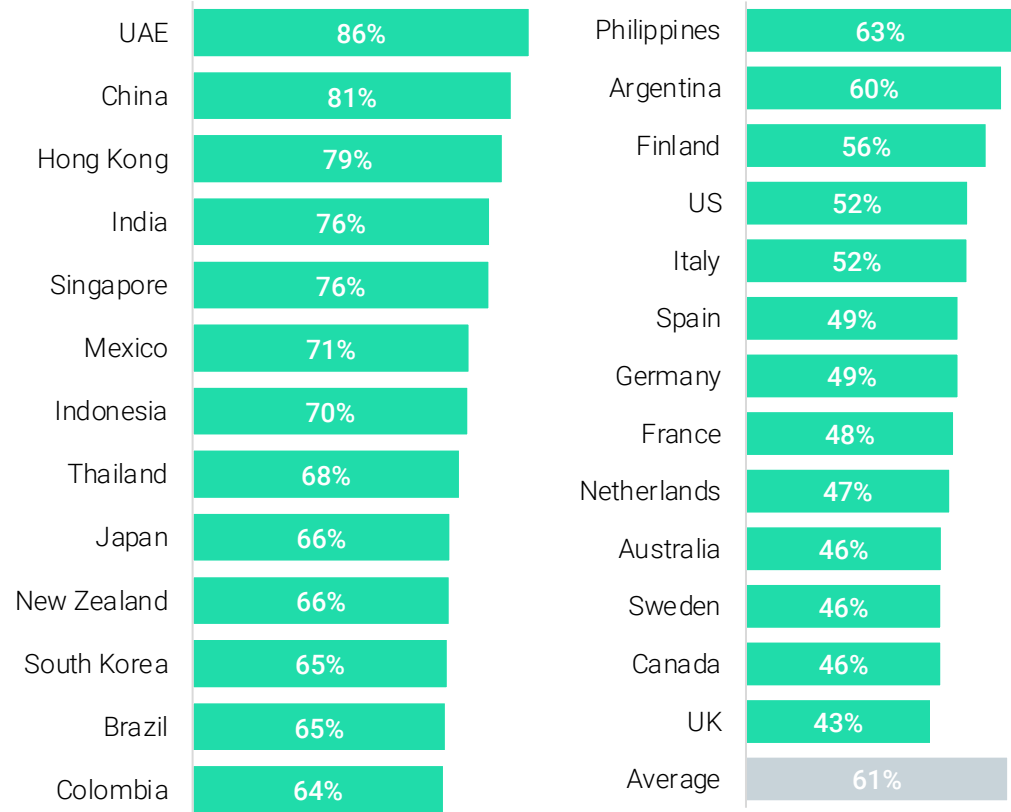Source: Qualtrics XM Institute Q3 2023 Global Consumer Study

Consumer Comfort with AI: Booking a Plane Ticket

KEY TAKEAWAYS

+ Emirati consumers are two times as likely as UK consumers to say that they would be comfortable using an organization's AI to book an airplane ticket.

ABOUT

This chart shows the percentage of consumers from each country that are comfortable interacting with an organization's AI system to book an airplane ticket.

How comfortable would you be interacting with an organization's AI system to accomplish the following interaction: *Booking an airplane ticket*
(Percentage *comfortable* or *very comfortable*)

Country	%		Country	%
UAE	86%		Philippines	63%
China	81%		Argentina	60%
Hong Kong	79%		Finland	56%
India	76%		US	52%
Singapore	76%		Italy	52%
Mexico	71%		Spain	49%
Indonesia	70%		Germany	49%
Thailand	68%		France	48%
Japan	66%		Netherlands	47%
New Zealand	66%		Australia	46%
South Korea	65%		Sweden	46%
Brazil	65%		Canada	46%
Colombia	64%		UK	43%
			Average	61%

Base: 28,400 consumers across 26 countries
Source: Qualtrics XM Institute Q3 2023 Global Consumer Study
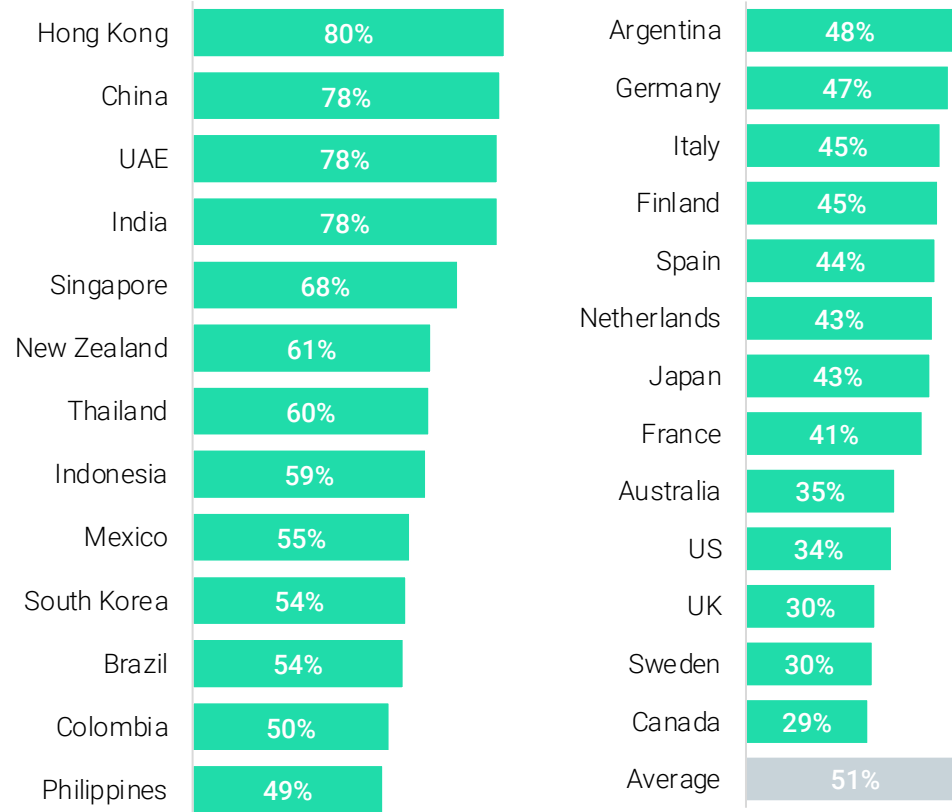
Consumer Comfort with AI: Billing Issues

KEY TAKEAWAYS

+ Consumers in Hong Kong are 2.8x more likely Canadians to say that they are comfortable resolving an issue with a bill using an organization's AI.

+ Under half of consumers said that they are comfortable using an organization's AI to resolve a billing issue in fourteen of twenty-six countries.

ABOUT

This chart shows the percentage of consumers from each country that are comfortable interacting with an organization's AI system to resolve an issue with a bill.

How comfortable would you be interacting with an organization's AI system to accomplish the following interaction: *Resolving an issue with a bill*
(Percentage *comfortable* or *very comfortable*)

Country	%		Country	%
Hong Kong	80%		Argentina	48%
China	78%		Germany	47%
UAE	78%		Italy	45%
India	78%		Finland	45%
Singapore	68%		Spain	44%
New Zealand	61%		Netherlands	43%
Thailand	60%		Japan	43%
Indonesia	59%		France	41%
Mexico	55%		Australia	35%
South Korea	54%		US	34%
Brazil	54%		UK	30%
Colombia	50%		Sweden	30%
Philippines	49%		Canada	29%
			Average	51%

Base: 28,400 consumers across 26 countries
Source: Qualtrics XM Institute Q3 2023 Global Consumer Study
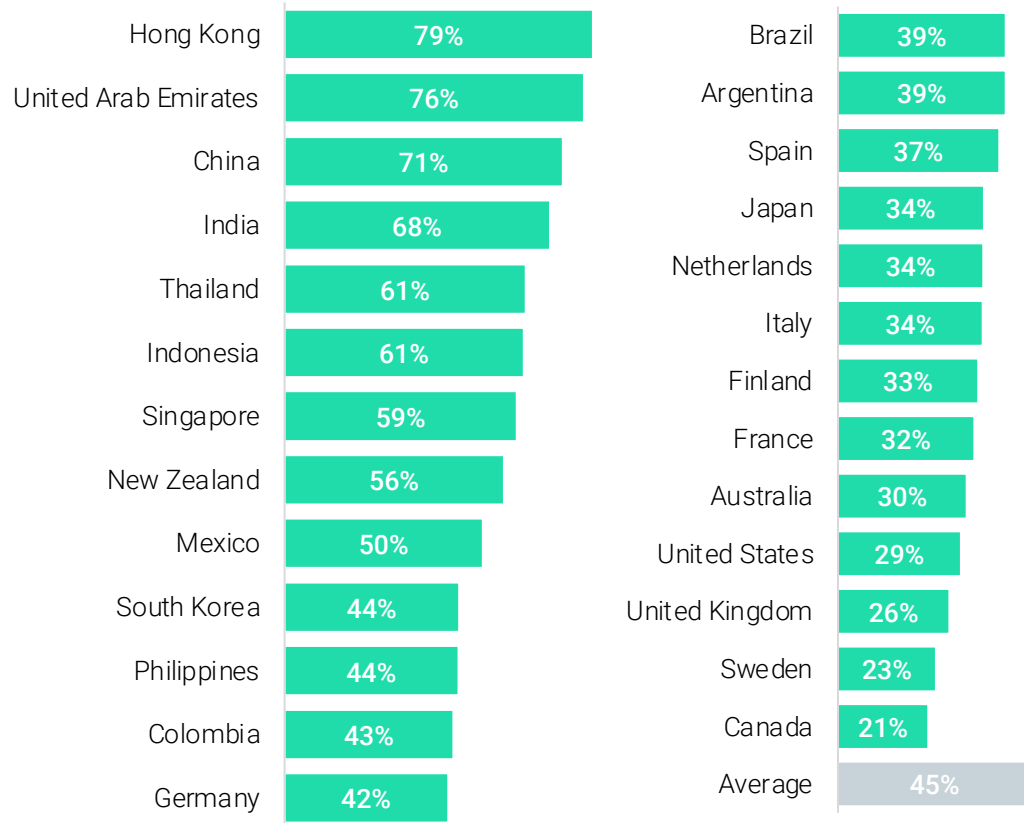
Consumer Comfort with AI: Medical Advice

KEY TAKEAWAYS

+ Emirati consumers said they are comfortable using an organization's AI to get advice about a medical problem 3.6x more frequently than Canadian consumers, and 3.3x more frequently than Swedish consumers.

ABOUT

This chart shows the percentage of consumers from each country that are comfortable interacting with an organization's AI system to get advice about a medical problem.

How comfortable would you be interacting with an organization's AI system to accomplish the following interaction: *Getting advice about a medical problem*
(Percentage *comfortable* or *very comfortable*)

Country	%
Hong Kong	79%
United Arab Emirates	76%
China	71%
India	68%
Thailand	61%
Indonesia	61%
Singapore	59%
New Zealand	56%
Mexico	50%
South Korea	44%
Philippines	44%
Colombia	43%
Germany	42%

Country	%
Brazil	39%
Argentina	39%
Spain	37%
Japan	34%
Netherlands	34%
Italy	34%
Finland	33%
France	32%
Australia	30%
United States	29%
United Kingdom	26%
Sweden	23%
Canada	21%
Average	45%

Base: 28,400 consumers across 26 countries
Source: Qualtrics XM Institute Q3 2023 Global Consumer Study
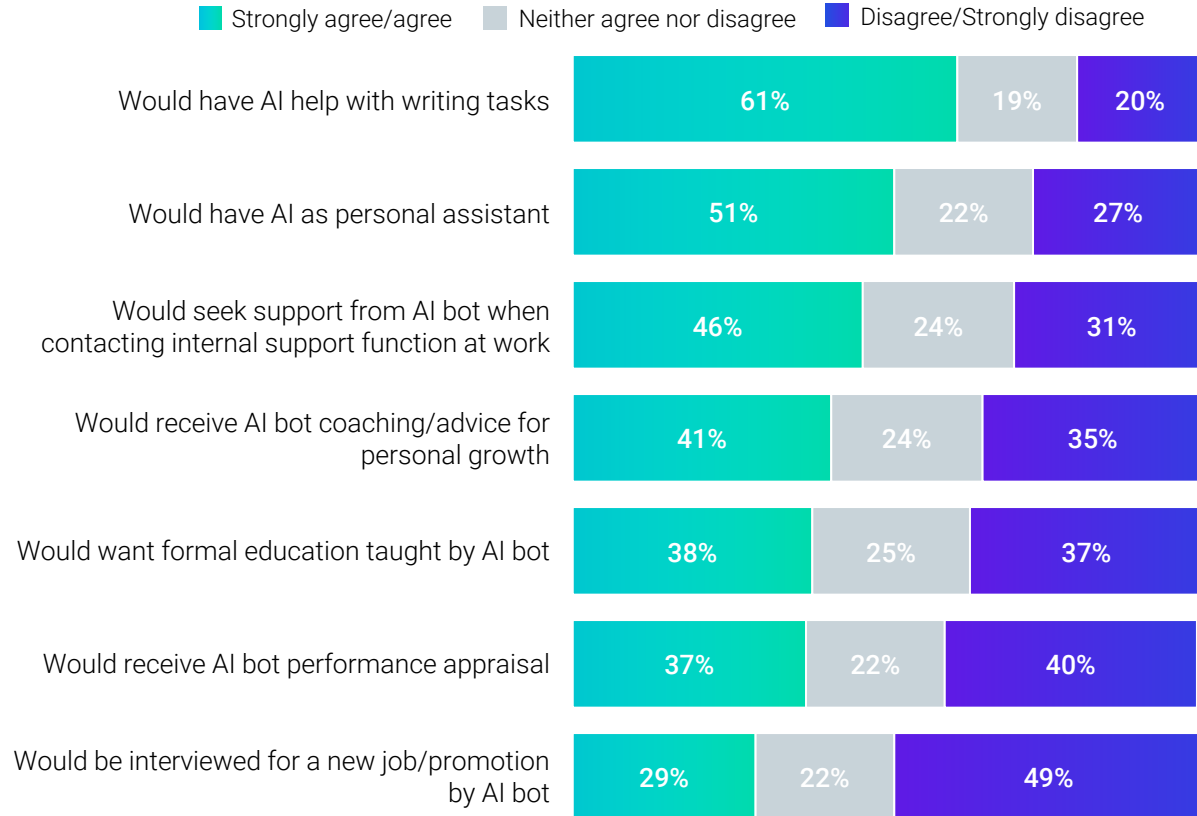
Employee Desire for AI: by Activity

KEY TAKEAWAYS

+ Globally, fewer than two-thirds of employees rate their desire for AI support in these seven tasks favorably.

+ Employees are most likely to want AI to support them with writing tasks, with 61% favorable, while they are least likely to want AI to support them by interviewing them for a new job or a promotion (29%).

ABOUT

This chart shows the overall percentage of employees globally that agree/disagree with their desire for AI support for seven activities.

I would want Artificial Intelligence (i.e. using machines to do tasks that normally require human intelligence) to support me in the following…

■ Strongly agree/agree   ■ Neither agree nor disagree   ■ Disagree/Strongly disagree

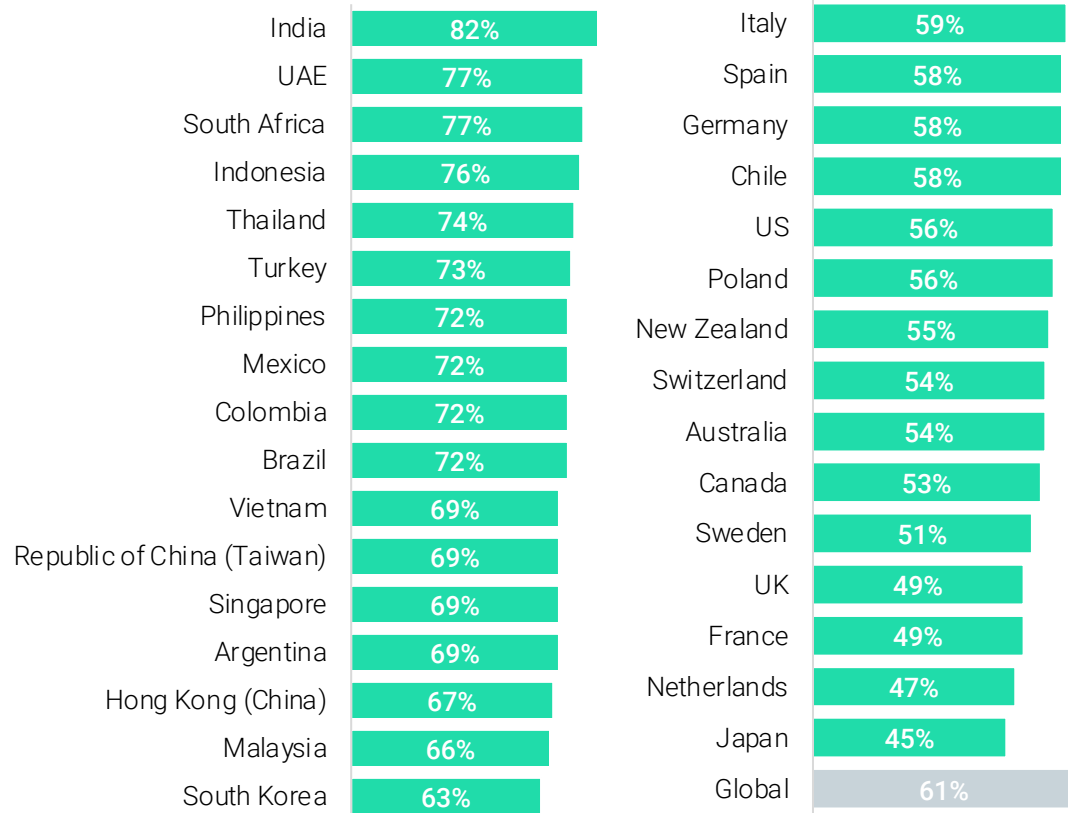| Activity	Strongly agree/agree	Neither agree nor disagree	Disagree/Strongly disagree
Would have AI help with writing tasks	61%	19%	20%
Would have AI as personal assistant	51%	22%	27%
Would seek support from AI bot when contacting internal support function at work	46%	24%	31%
Would receive AI bot coaching/advice for personal growth	41%	24%	35%
Would want formal education taught by AI bot	38%	25%	37%
Would receive AI bot performance appraisal	37%	22%	40%
Would be interviewed for a new job/promotion by AI bot	29%	22%	49%

Employee Desire for AI: Writing Tasks

KEY TAKEAWAYS

+ More than half of employees would want AI to support them in writing tasks in 28 of 32 countries.

+ Employees in India rate their interest in AI support with writing tasks most favorably (82%), while Japanese employees are least likely to do so (45%).

ABOUT

This shows the percentage of employees from each country that *agree* or *strongly agree* that they *would have AI help with writing tasks.*

I would want AI to support me... *with writing tasks*
(Percentage *agree* or *strongly agree*)

Country	%
India	82%
UAE	77%
South Africa	77%
Indonesia	76%
Thailand	74%
Turkey	73%
Philippines	72%
Mexico	72%
Colombia	72%
Brazil	72%
Vietnam	69%
Republic of China (Taiwan)	69%
Singapore	69%
Argentina	69%
Hong Kong (China)	67%
Malaysia	66%
South Korea	63%

Country	%
Italy	59%
Spain	58%
Germany	58%
Chile	58%
US	56%
Poland	56%
New Zealand	55%
Switzerland	54%
Australia	54%
Canada	53%
Sweden	51%
UK	49%
France	49%
Netherlands	47%
Japan	45%
Global	61%

Base: 31,577 employees across 32 countries
Source: Employee Experience 2024 Trends Global Study
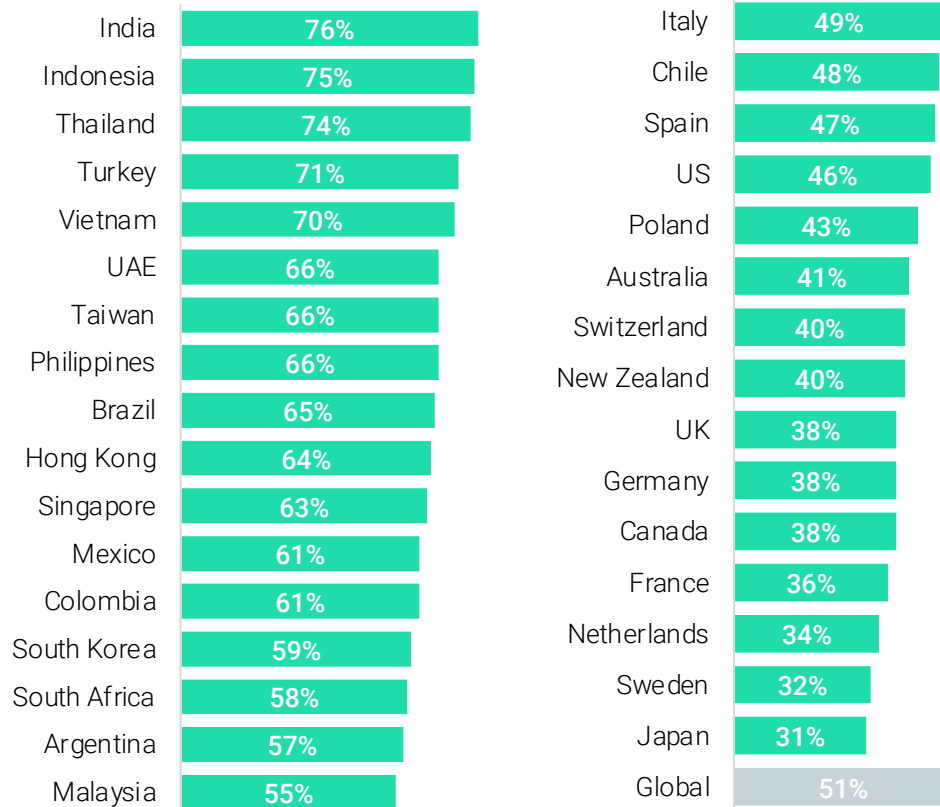
Employee Desire for AI: Personal Assistant

KEY TAKEAWAYS

+ More than half of employees in 17 of 32 countries would want AI to support them as a personal assistant.

+ Employees in Japan are the least likely to rate their desire for AI support as a personal assistant favorably (31%), followed by Swedish (32%) and Dutch (34%) employees.

+ Indian employees are the most likely to want AI to support them as a personal assistant (76%).

ABOUT

This shows the percentage of employees from each country that *agree* or *strongly agree* that they *would have AI as a personal assistant*.

I would want AI to support me... *as a personal assistant*
(Percentage *agree* or *strongly agree*)

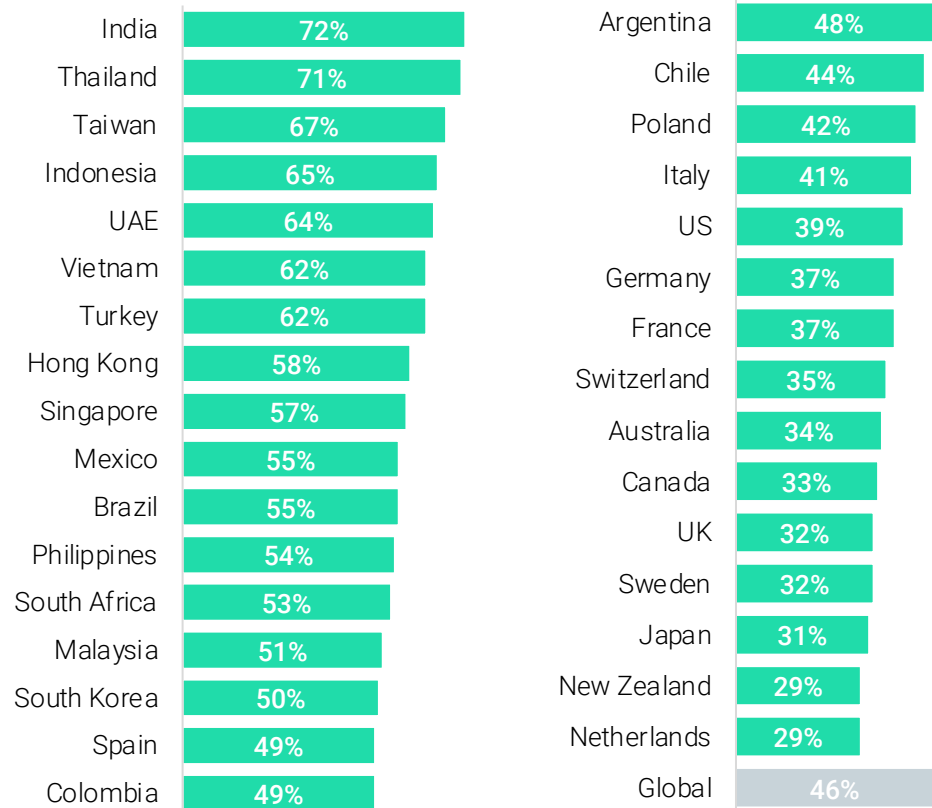| Country	%		Country	%
India	76%		Italy	49%
Indonesia	75%		Chile	48%
Thailand	74%		Spain	47%
Turkey	71%		US	46%
Vietnam	70%		Poland	43%
UAE	66%		Australia	41%
Taiwan	66%		Switzerland	40%
Philippines	66%		New Zealand	40%
Brazil	65%		UK	38%
Hong Kong	64%		Germany	38%
Singapore	63%		Canada	38%
Mexico	61%		France	36%
Colombia	61%		Netherlands	34%
South Korea	59%		Sweden	32%
South Africa	58%		Japan	31%
Argentina	57%		Global	51%
Malaysia	55%			

Employee Desire for AI: Contacting Internal Support

KEY TAKEAWAYS

+ More than half of employees in fifteen of thirty-two countries agree that they would want AI to support them when contacting internal support at work.

+ Dutch and New Zealander employees are the least likely to be interested in AI support for this task (29%).

+ Indian employees are the most interested in AI support when contacting internal support functions at work (72%), followed by Thai employees (71%).

ABOUT

This shows the percentage of employees from each country that *agree* or *strongly agree* that they *would seek support from AI bot* when contacting internal support function at work.

I would want AI to support me... *when contacting internal support function at work*
(Percentage *agree* or *strongly agree*)

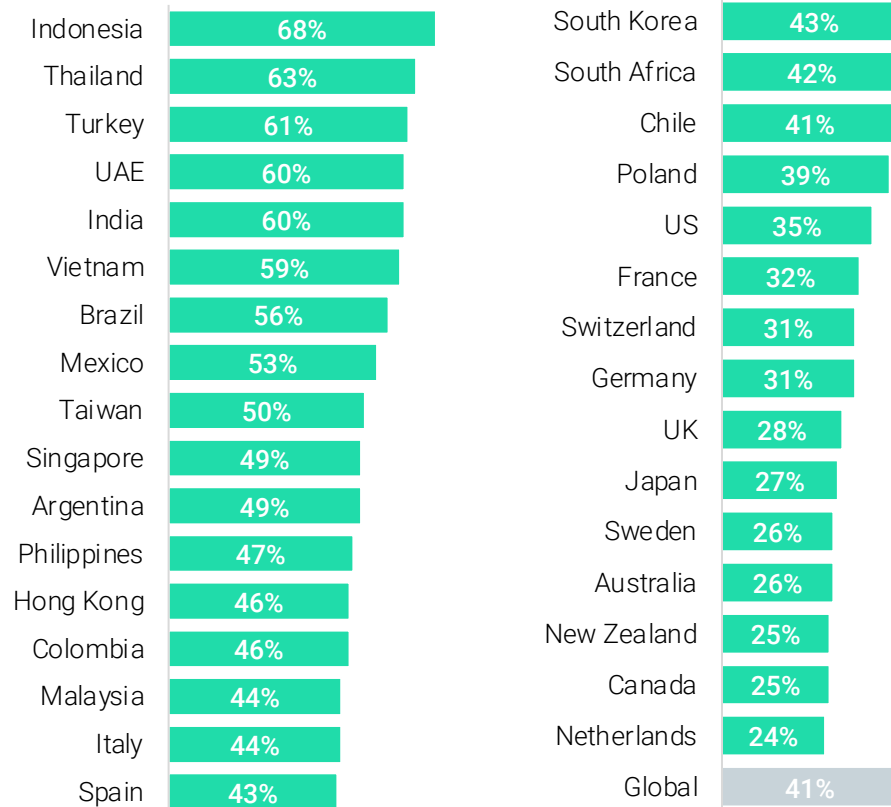| Country	%		Country	%
India	72%		Argentina	48%
Thailand	71%		Chile	44%
Taiwan	67%		Poland	42%
Indonesia	65%		Italy	41%
UAE	64%		US	39%
Vietnam	62%		Germany	37%
Turkey	62%		France	37%
Hong Kong	58%		Switzerland	35%
Singapore	57%		Australia	34%
Mexico	55%		Canada	33%
Brazil	55%		UK	32%
Philippines	54%		Sweden	32%
South Africa	53%		Japan	31%
Malaysia	51%		New Zealand	29%
South Korea	50%		Netherlands	29%
Spain	49%		Global	46%
Colombia	49%			

Employee Desire for AI: Coaching for Growth

KEY TAKEAWAYS

+ More than half of employees would want AI support with coaching for personal growth in just nine of 32 countries.

+ Indonesian employees have the largest appetite for AI support with personal growth advice (68%), followed by Thai (63%) and Turkish (61%) employees.

+ Under twenty-five percent of Dutch employees would want AI to support then with coaching/advice for personal growth – the least favorable rating across all countries.

ABOUT

This shows the percentage of employees from each country that *agree* or *strongly agree* that they *would receive AI coaching/advice for personal growth.*

I would want AI to support me... *with coaching/advice for personal growth*
(Percentage *agree* or *strongly agree*)

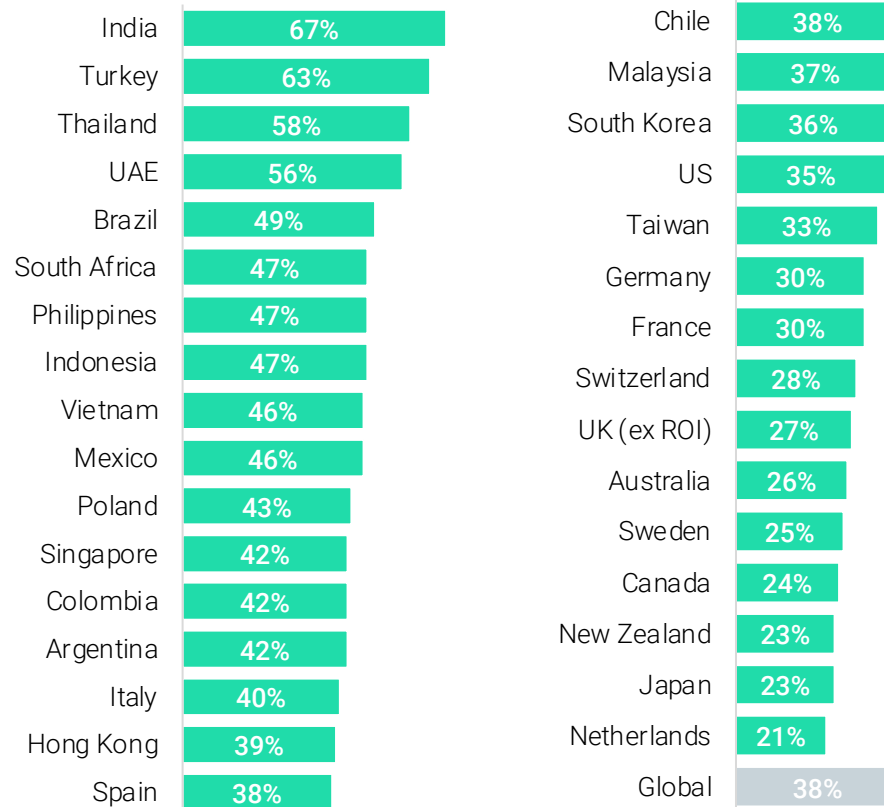| Country	%		Country	%
Indonesia	68%		South Korea	43%
Thailand	63%		South Africa	42%
Turkey	61%		Chile	41%
UAE	60%		Poland	39%
India	60%		US	35%
Vietnam	59%		France	32%
Brazil	56%		Switzerland	31%
Mexico	53%		Germany	31%
Taiwan	50%		UK	28%
Singapore	49%		Japan	27%
Argentina	49%		Sweden	26%
Philippines	47%		Australia	26%
Hong Kong	46%		New Zealand	25%
Colombia	46%		Canada	25%
Malaysia	44%		Netherlands	24%
Italy	44%		Global	41%
Spain	43%			

Employee Desire for AI: Formal Education

KEY TAKEAWAYS

+ Employees in India are the most interested in AI support through formal education, with a 67% favorable rating, followed by Turkey (63%).

+ Dutch employees are the least interested in AI teaching formal education, with a rating of 21%. They are closely followed by Japanese and New Zealander employees, both at 23%.

ABOUT

This shows the percentage of employees from each country that *agree* or *strongly agree* that they *would want formal education taught by AI bot*.

I would want AI to support me… *by teaching formal education*
(Percentage *agree* or *strongly agree*)

Country	%
India	67%
Turkey	63%
Thailand	58%
UAE	56%
Brazil	49%
South Africa	47%
Philippines	47%
Indonesia	47%
Vietnam	46%
Mexico	46%
Poland	43%
Singapore	42%
Colombia	42%
Argentina	42%
Italy	40%
Hong Kong	39%
Spain	38%

Country	%
Chile	38%
Malaysia	37%
South Korea	36%
US	35%
Taiwan	33%
Germany	30%
France	30%
Switzerland	28%
UK (ex ROI)	27%
Australia	26%
Sweden	25%
Canada	24%
New Zealand	23%
Japan	23%
Netherlands	21%
Global	38%

Base: 31,577 employees across 32 countries
Source: Employee Experience 2024 Trends Global Study

Employee Desire for AI: Performance Appraisal
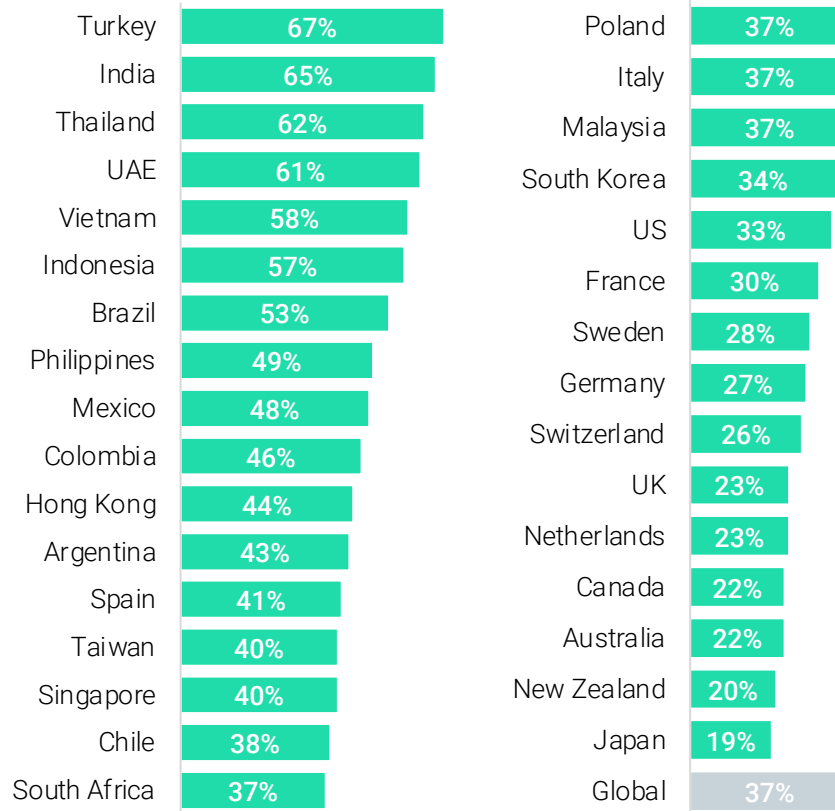
KEY TAKEAWAYS

+ Under half of employees would want AI to support them with a performance appraisal in 25 of 32 countries.

+ Japanese employees are least interested in an AI performance appraisal, at 19% favorable.

+ At 67% favorable, Turkish employees have the largest appetite for AI support through a performance appraisal.

ABOUT

This shows the percentage of employees from each country that *agree* or *strongly agree* that they *would receive AI bot performance appraisal*.

I would want AI to support me... *by conducting a performance appraisal*
(Percentage *agree* or *strongly agree*)

Country	%		Country	%
Turkey	67%		Poland	37%
India	65%		Italy	37%
Thailand	62%		Malaysia	37%
UAE	61%		South Korea	34%
Vietnam	58%		US	33%
Indonesia	57%		France	30%
Brazil	53%		Sweden	28%
Philippines	49%		Germany	27%
Mexico	48%		Switzerland	26%
Colombia	46%		UK	23%
Hong Kong	44%		Netherlands	23%
Argentina	43%		Canada	22%
Spain	41%		Australia	22%
Taiwan	40%		New Zealand	20%
Singapore	40%		Japan	19%
Chile	38%		Global	37%
South Africa	37%			

Base: 31,577 employees across 32 countries
Source: Employee Experience 2024 Trends Global Study
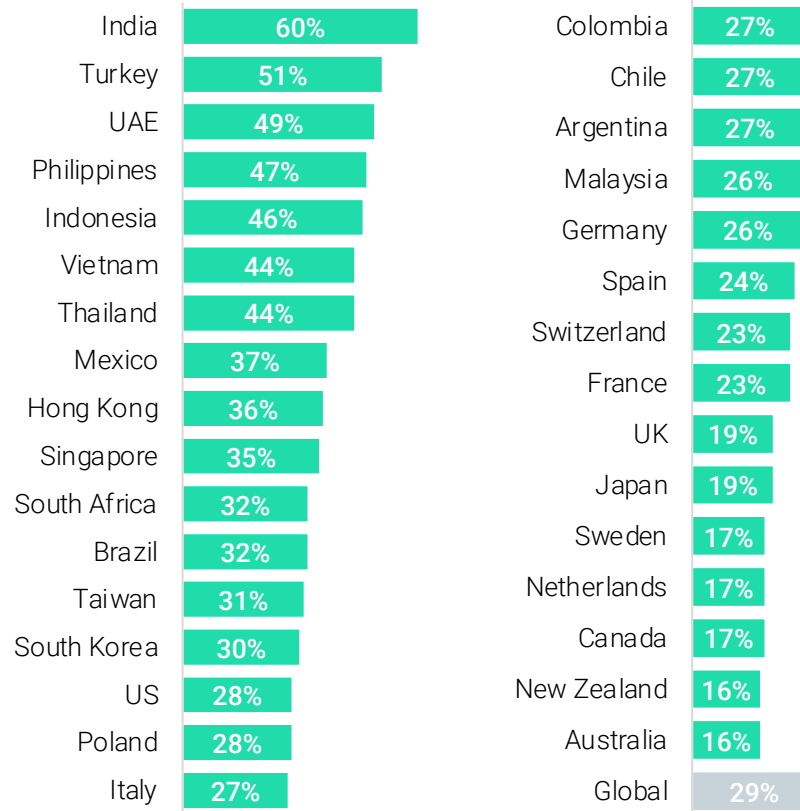
Employee Desire for AI: Job Interview

KEY TAKEAWAYS

+ Under one-quarter of employees would want AI to interview them for a new job/promotion in ten of thirty-two countries.

+ Indian employees are the most likely to agree that they would want AI to interview them (60%), followed by Turkish (51%) and Emirate (49%) employees.

+ Australian and New Zealander employees are the least likely to want AI to interview them for a new job, each at 16% favorable.

ABOUT

This shows the percentage of employees from each country that *agree* or *strongly agree* that they *would be interviewed for new job/promotion by AI bot.*

I would want AI to support me… *by interviewing me for a new job/promotion*
(Percentage *agree* or *strongly agree*)

Country	%		Country	%
India	60%		Colombia	27%
Turkey	51%		Chile	27%
UAE	49%		Argentina	27%
Philippines	47%		Malaysia	26%
Indonesia	46%		Germany	26%
Vietnam	44%		Spain	24%
Thailand	44%		Switzerland	23%
Mexico	37%		France	23%
Hong Kong	36%		UK	19%
Singapore	35%		Japan	19%
South Africa	32%		Sweden	17%
Brazil	32%		Netherlands	17%
Taiwan	31%		Canada	17%
South Korea	30%		New Zealand	16%
US	28%		Australia	16%
Poland	28%		Global	29%
Italy	27%			

Methodology

DATA CALCULATION

Data in **Figures 1–16** comes from the Qualtrics XM Institute Q3 2023 Global Consumer Study. Data in **Figures 17-24** comes from the Qualtrics Employee Experience 2024 Trends Global Study.

Figure 3 was calculated by taking the average across all countries/regions of the percentage of consumers selecting each concern.

Figure 10 was calculated by taking the average across all countries/regions for each respective activity of the percentage of consumers selecting each comfort level.

The 'Average' for each activity in **Figures 11-15** was calculated by combining the percentage *very comfortable* and *comfortable* as calculated for Figure 10.

Figure 16 was calculated by taking the average across all activities from Figures 11-15 for each country of the percentage of consumers selecting that they would be *comfortable* or *very comfortable* interacting with an organization's AI to complete each respective activity.

Figure 17 was calculated by taking the total percentage of employees across all countries/regions that selected *strongly agree/agree*, *neither agree nor disagree*, or *disagree/strongly disagree* with wanting AI to support them for each activity.

The 'Global' for each activity in **Figures 18-24** was calculated by combining the percentage *strongly agree* and *agree* as calculated for Figure 17.

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