



DATA SNAPSHOT

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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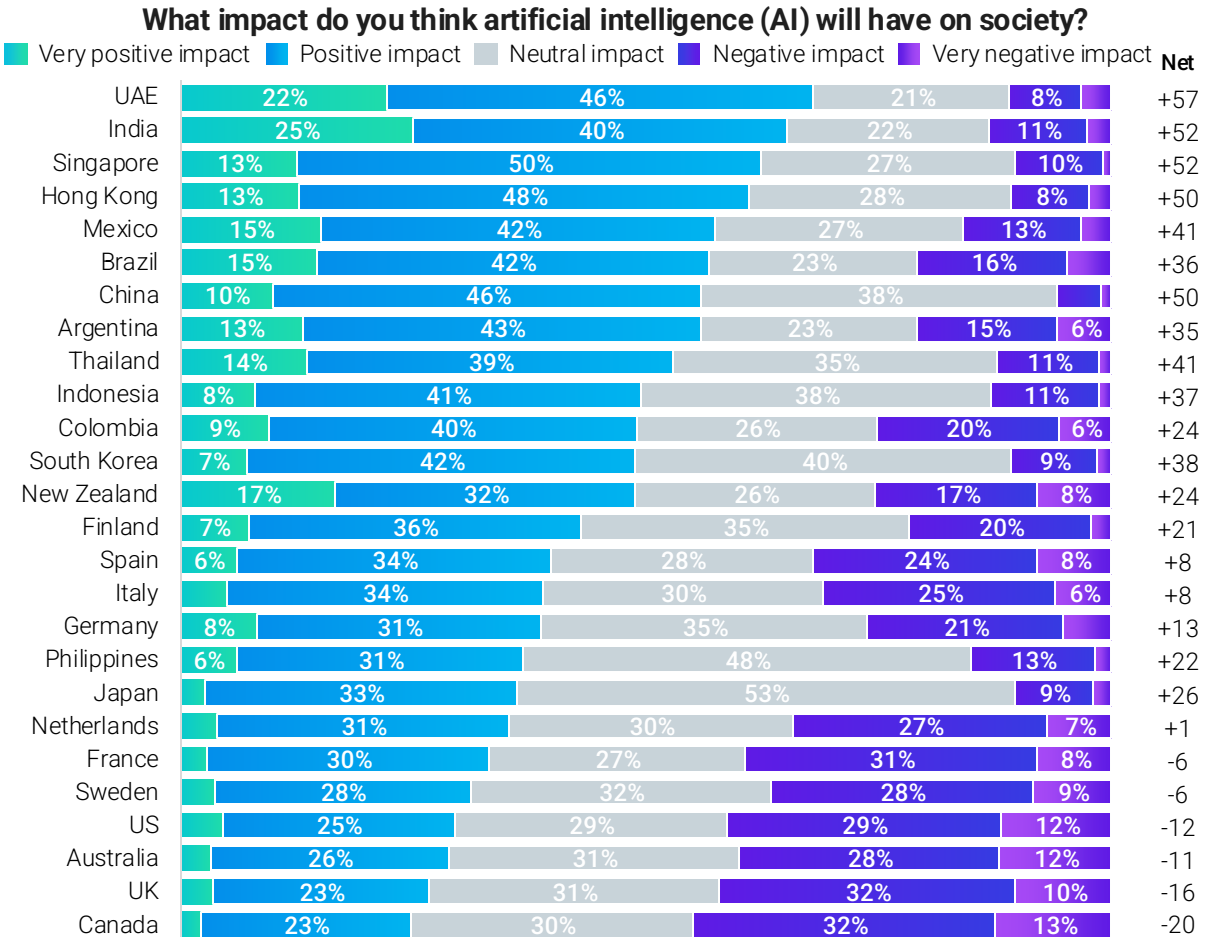
Societal Impact of AI

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.



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

Concern with Companies AI Usage

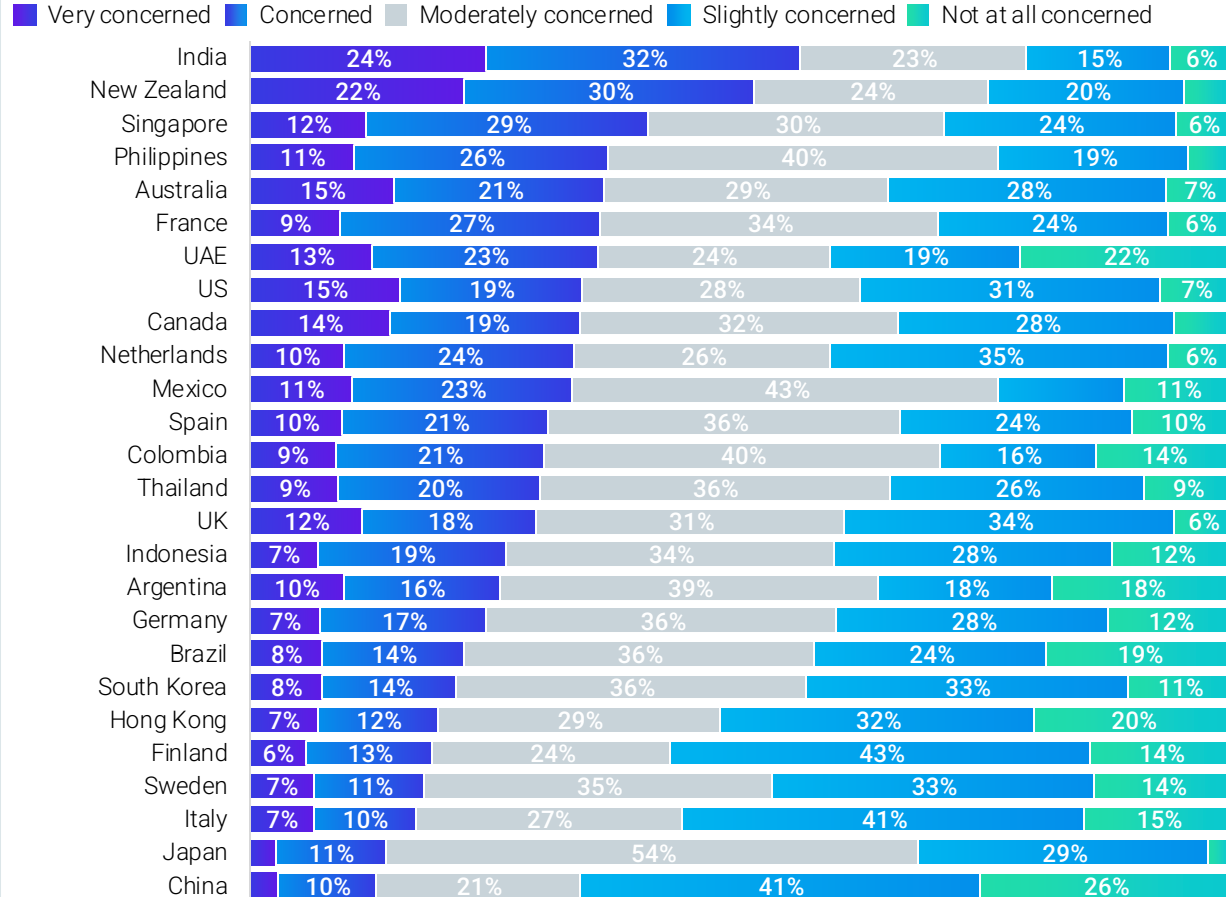
KEY TAKEAWAYS

- + 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)?



Base: 28,400 consumers across 26 countries

Source: Qualtrics XM Institute Q3 2023 Global Consumer Study

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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?



Consumer AI Concerns: Human Connection

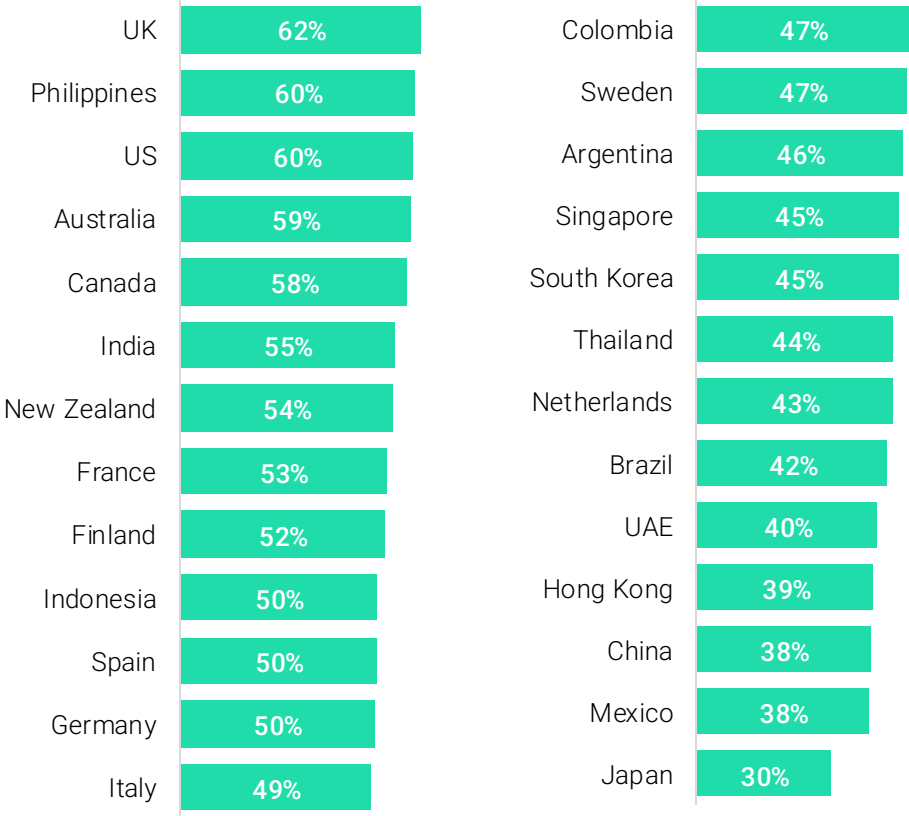
KEY TAKEAWAYS

- + 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



Consumer AI Concerns: Interaction Quality

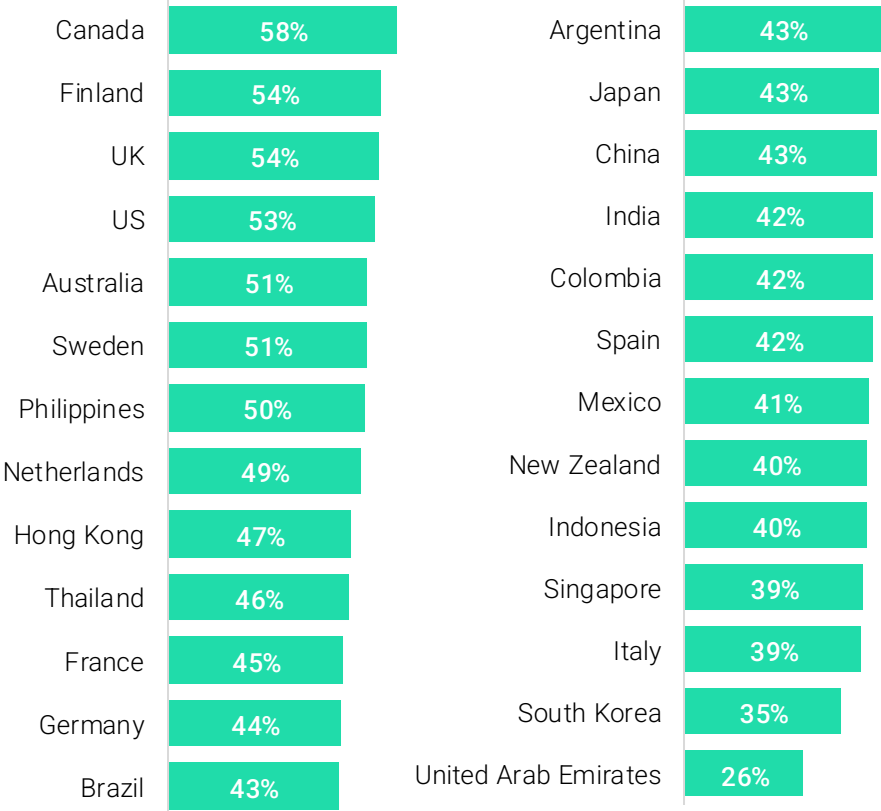
KEY TAKEAWAYS

- + 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



Consumer AI Concerns: Job Loss

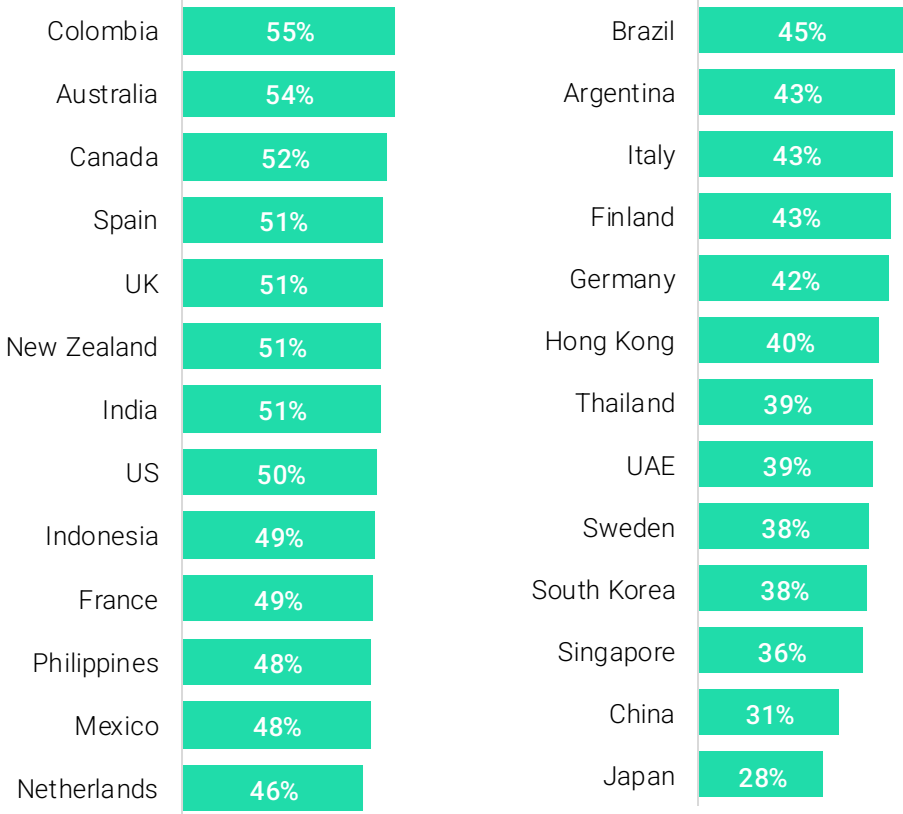
KEY TAKEAWAYS

- + 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



Consumer AI Concerns: Misuse of Data

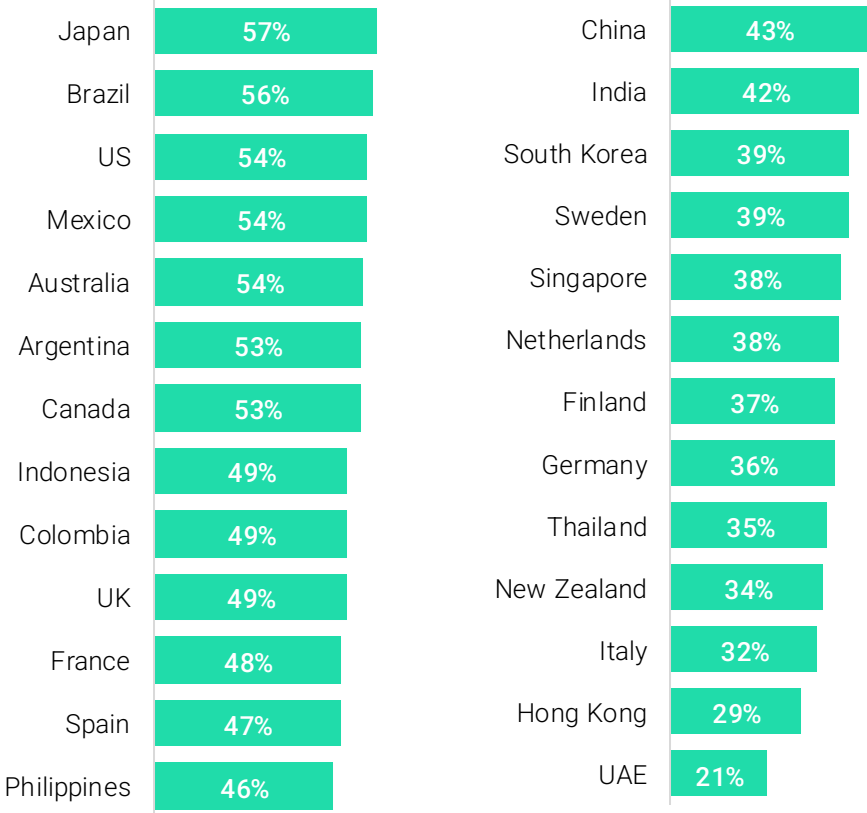
KEY TAKEAWAYS

- + 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



Consumer AI Concerns: Effort Required

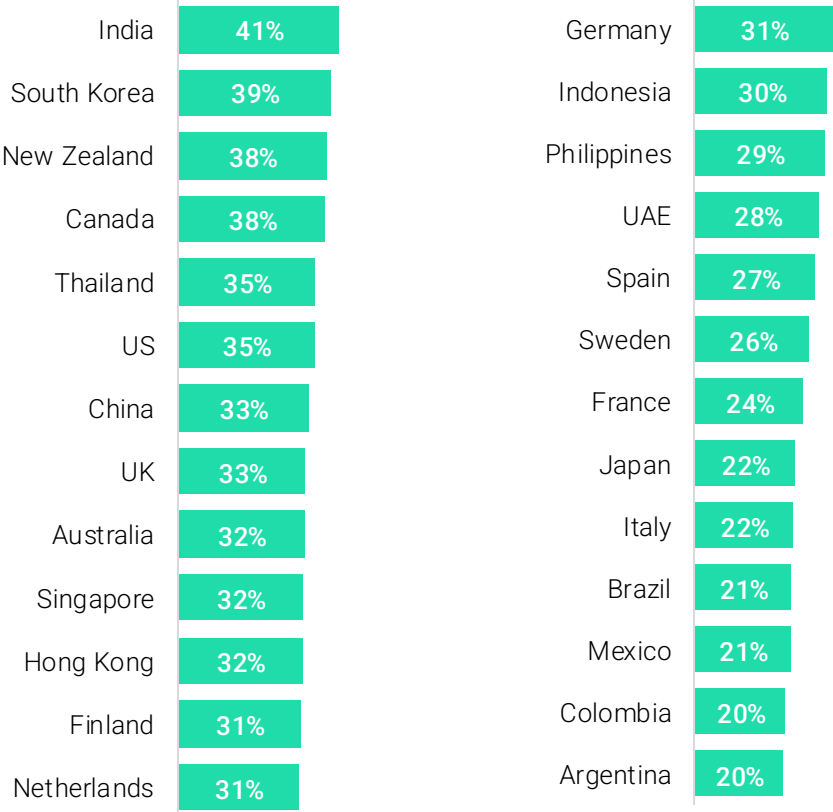
KEY TAKEAWAYS

- + 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



Consumer AI Concerns: Trust

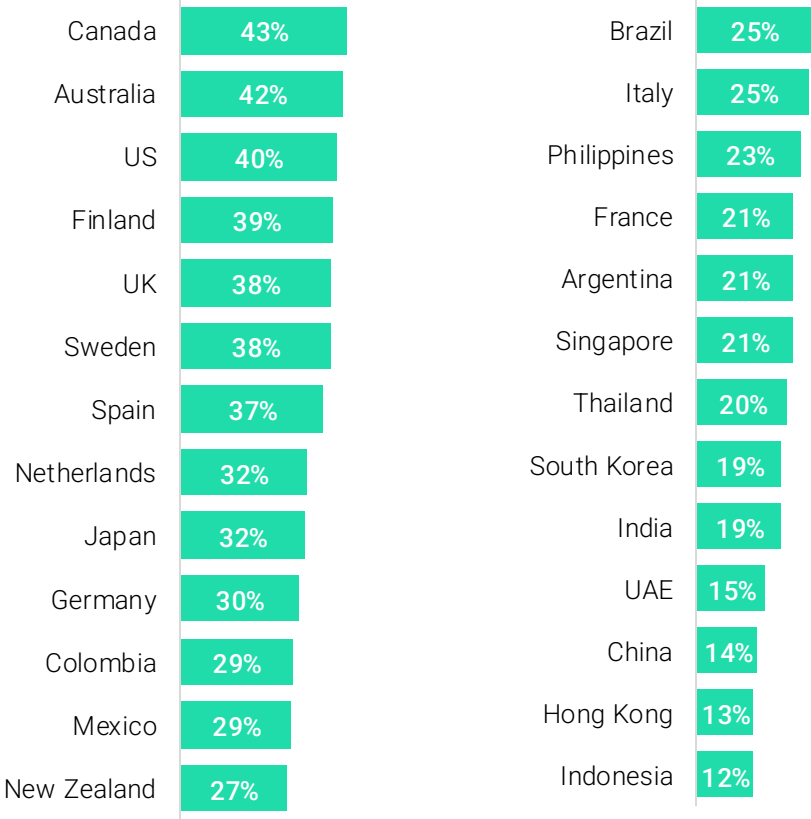
KEY TAKEAWAYS

- + 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



Consumer Comfort with AI: by Activity

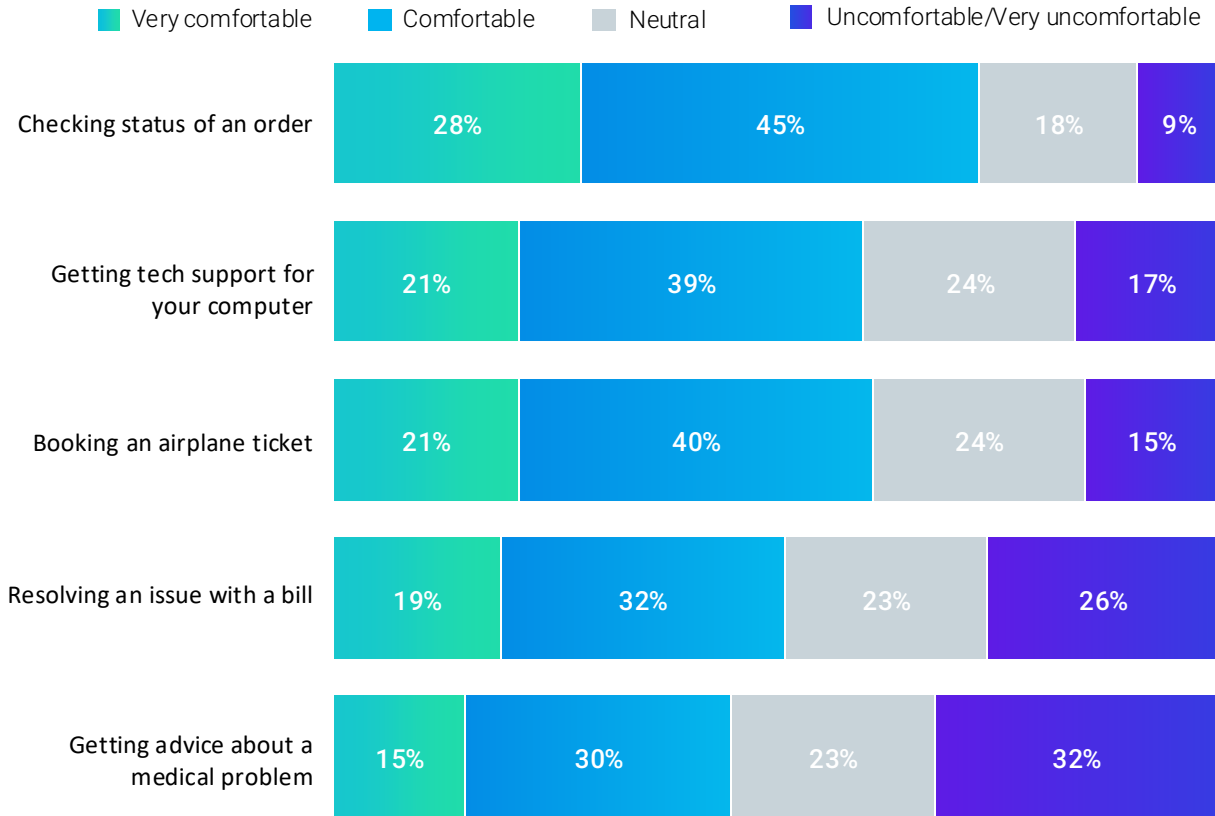
KEY TAKEAWAYS

- + 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?



Consumer Comfort with AI: Overall

KEY TAKEAWAYS

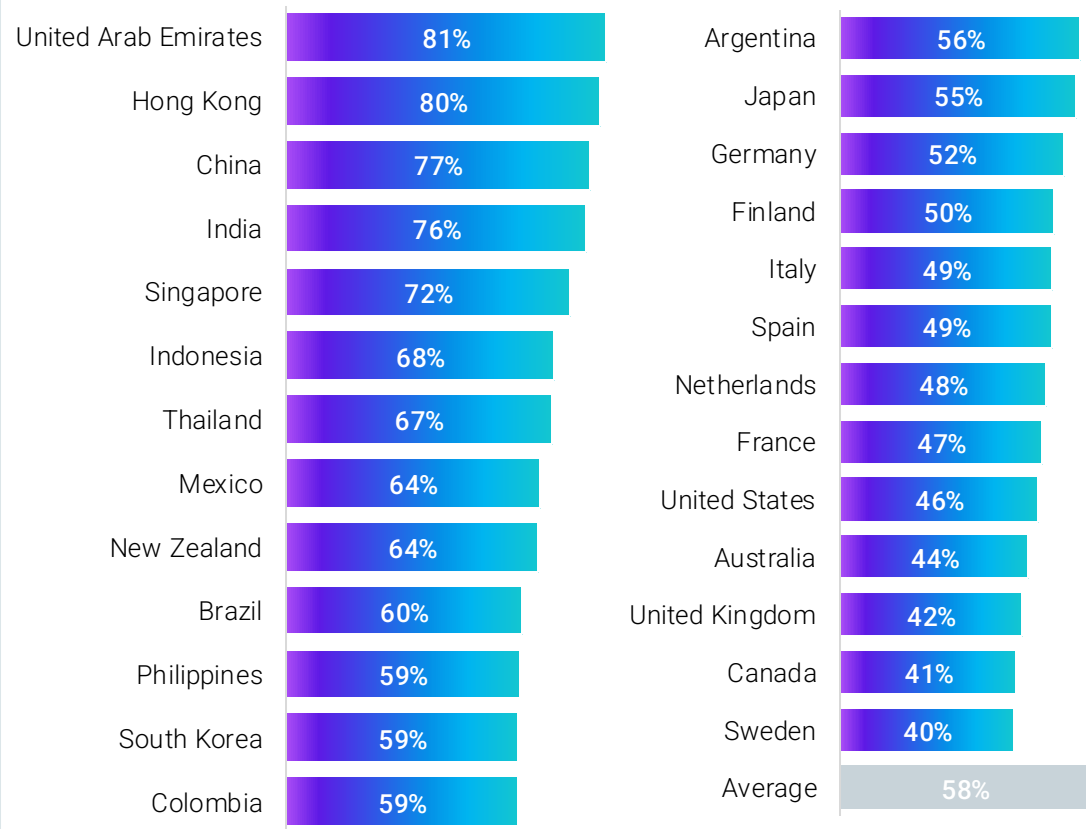
- + Globally, on average across all activities, 48% of consumers said they would be comfortable using an organization's AI.
- + Sixty-eight percent of Emirati consumers are comfortable completing activities using an organization's AI system, 2 times the level of comfort expressed by Canadian and Swedish 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)



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

Consumer Comfort with AI: Order Status

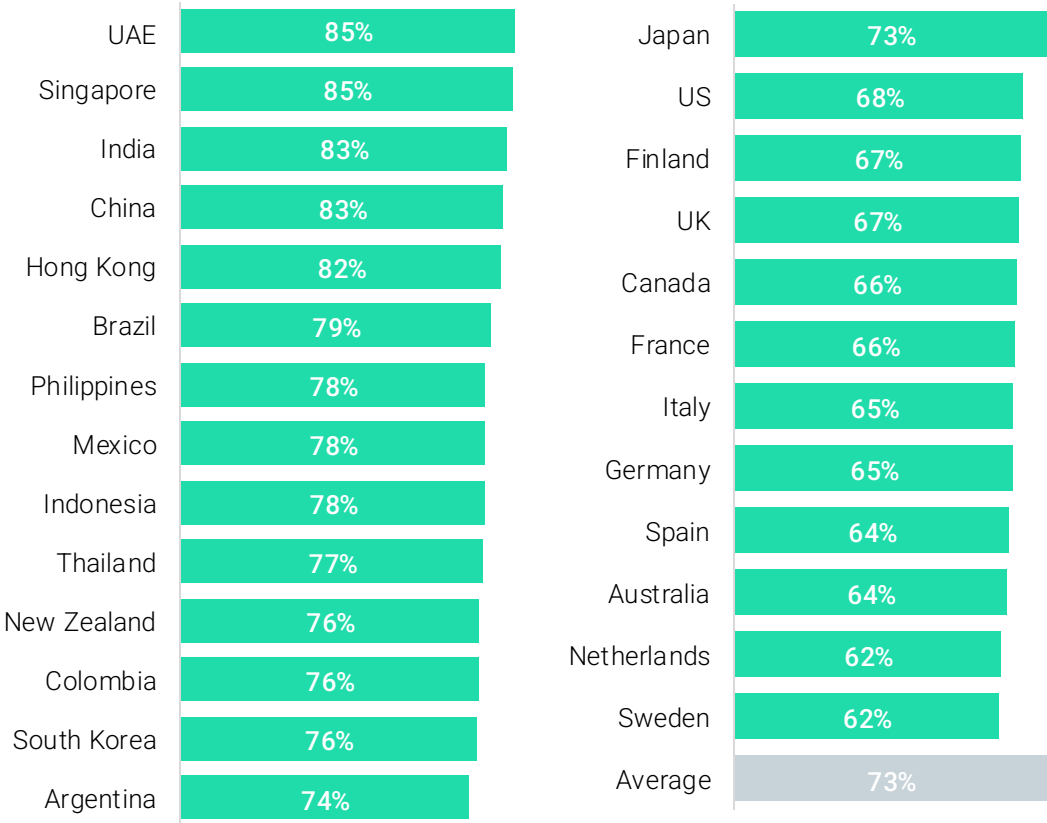
KEY TAKEAWAYS

+ 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)



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

Consumer Comfort with AI: Tech Support

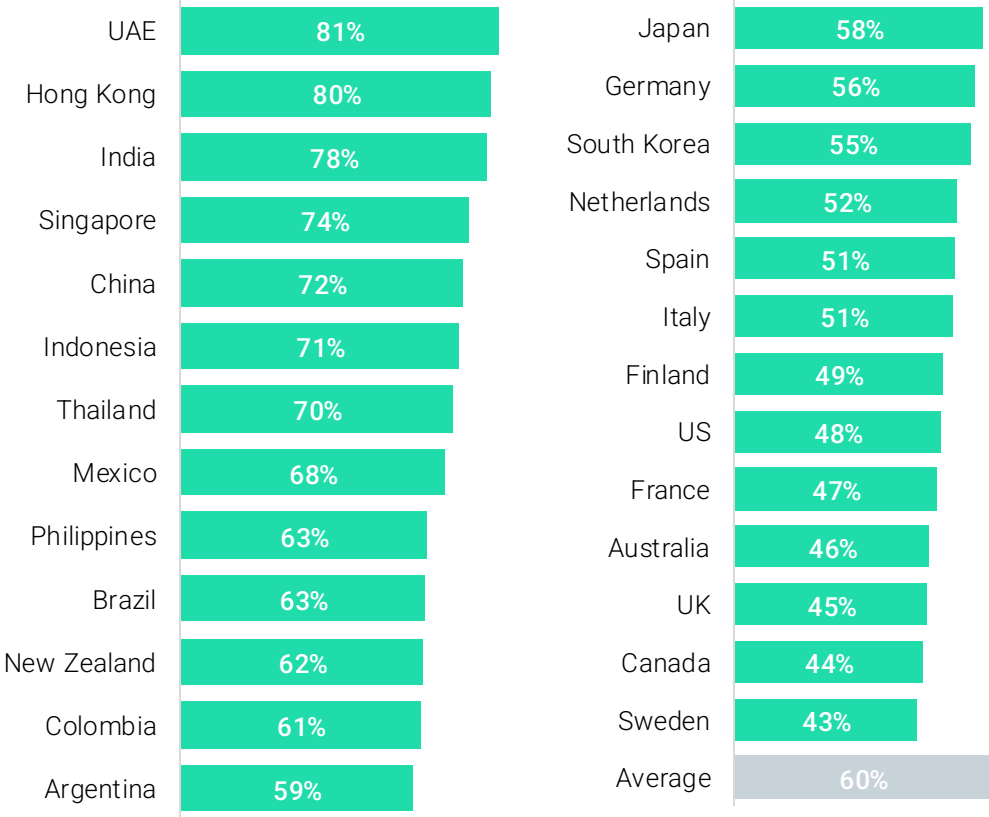
KEY TAKEAWAYS

- + 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)



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

Consumer Comfort with AI: Booking a Plane Ticket

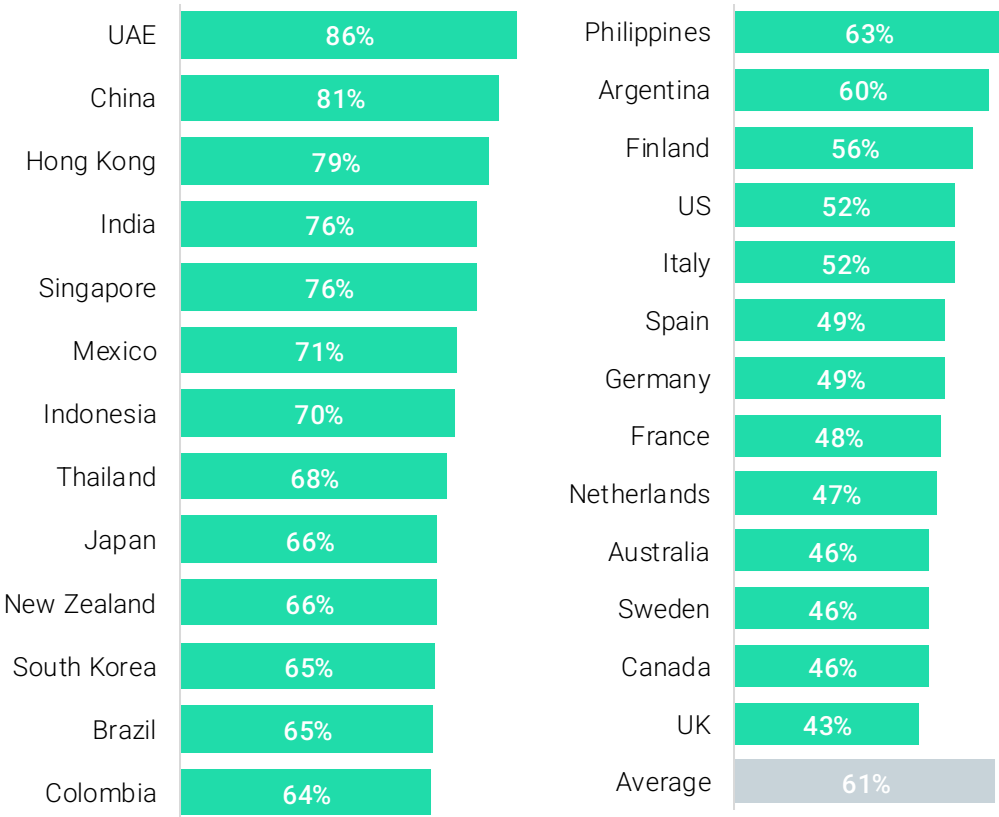
KEY TAKEAWAYS

+ 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)



Consumer Comfort with AI: Billing Issues

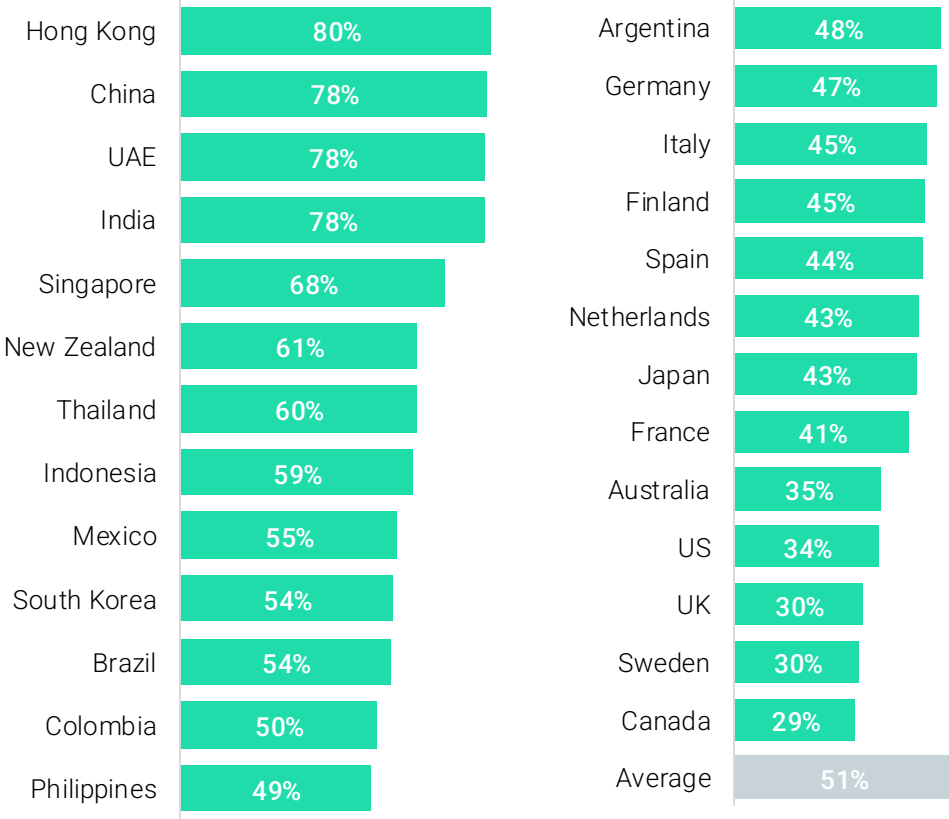
KEY TAKEAWAYS

- + 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)



Consumer Comfort with AI: Medical Advice

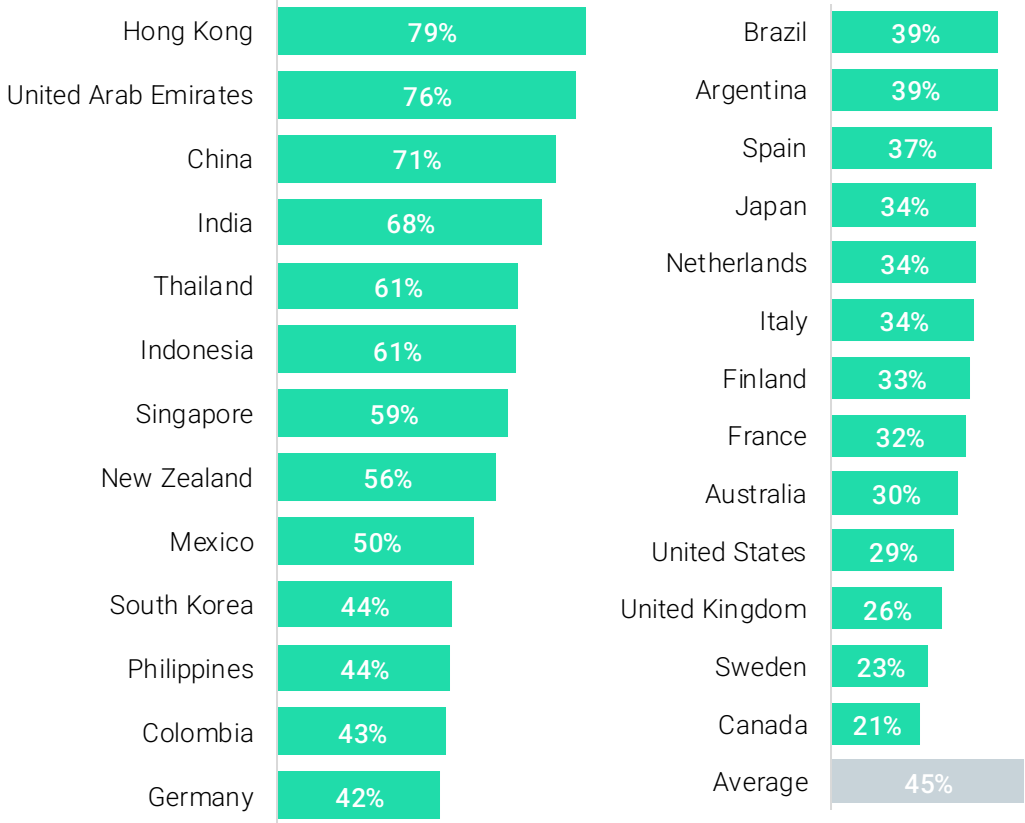
KEY TAKEAWAYS

+ 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)



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

Employee Desire for AI: by Activity

KEY TAKEAWAYS

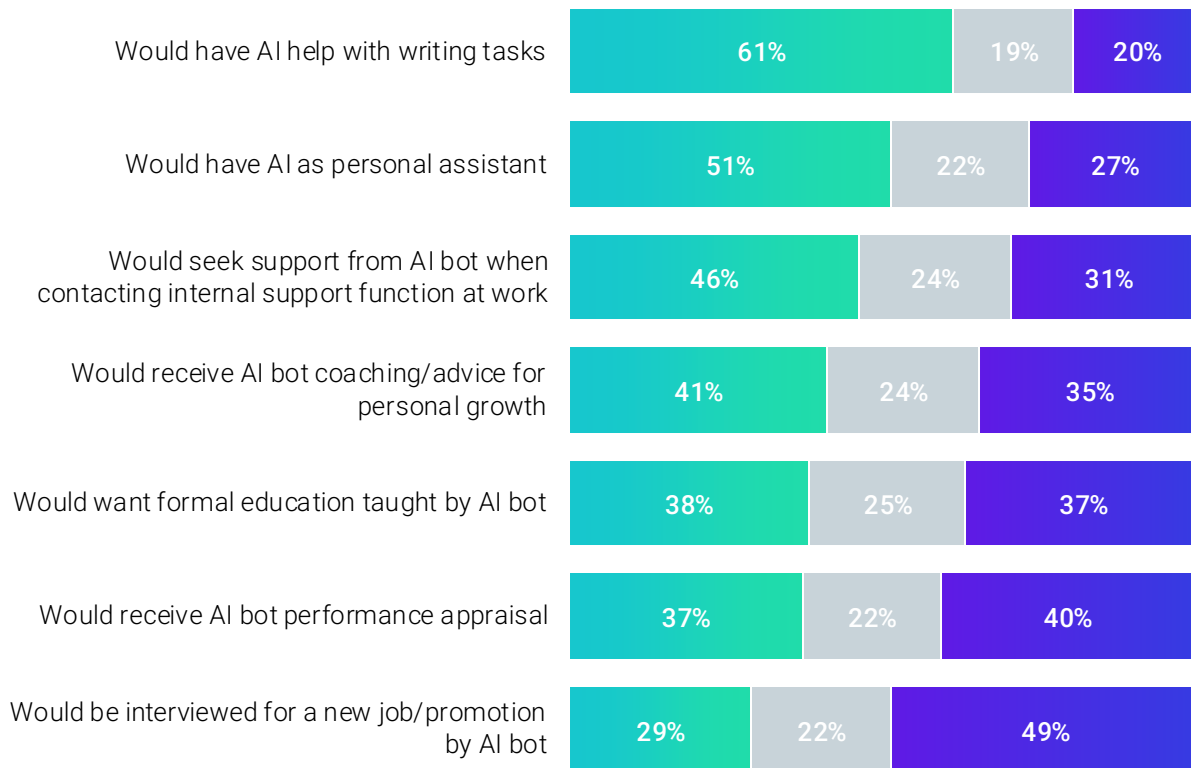
- + Globally, fewer than two-thirds of employees rate their desire for AI support in these seven tasks favorably.
- + Employees are most likely to want AI to support them with writing tasks, with 61% favorable, while they are least likely to want AI to support them by interviewing them for a new job 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



Employee Desire for AI: Writing Tasks

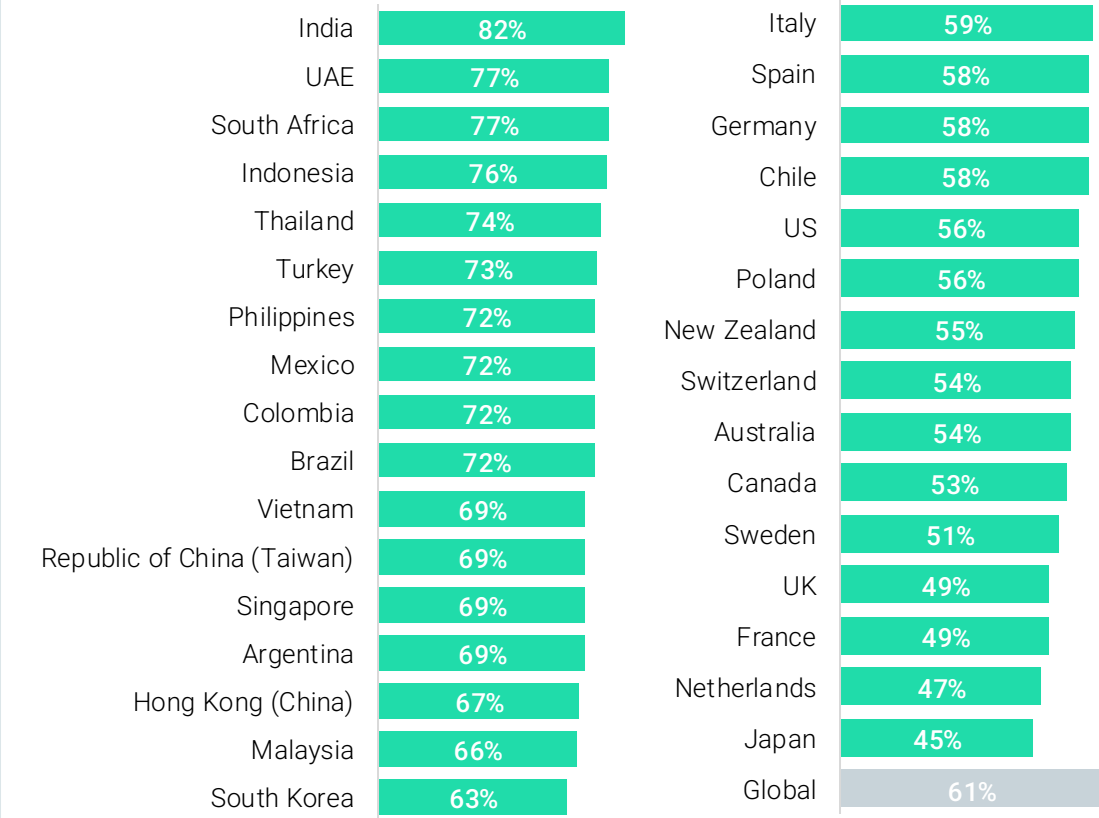
KEY TAKEAWAYS

- + 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)



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

Employee Desire for AI: Personal Assistant

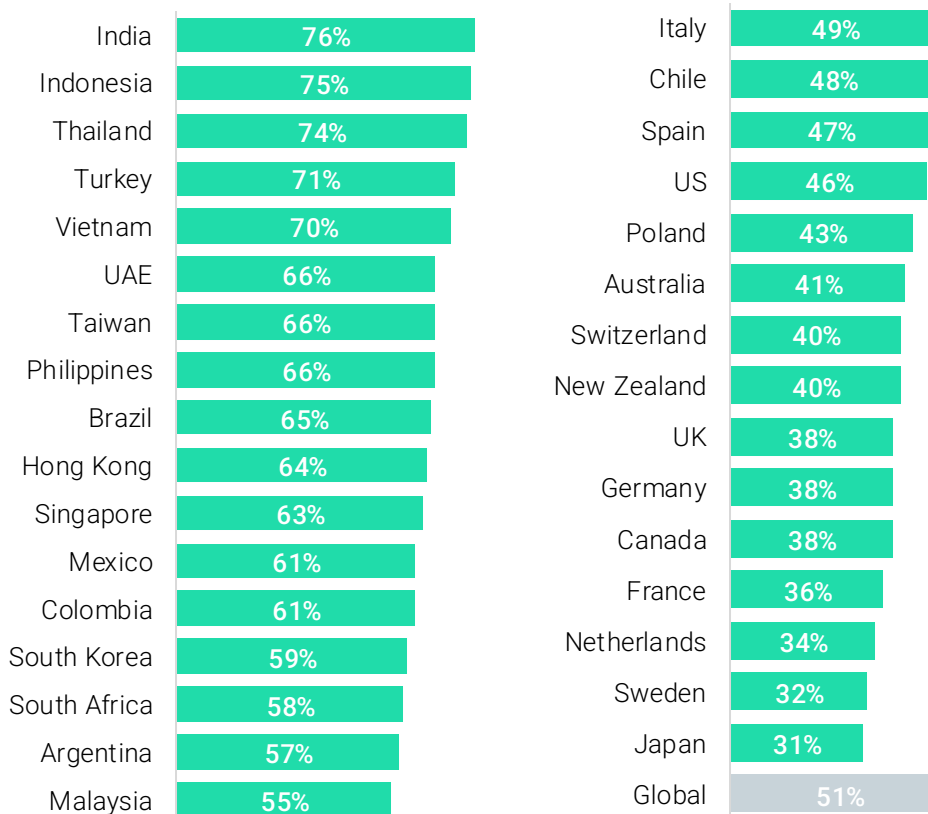
KEY TAKEAWAYS

- + 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)



Employee Desire for AI: Contacting Internal Support

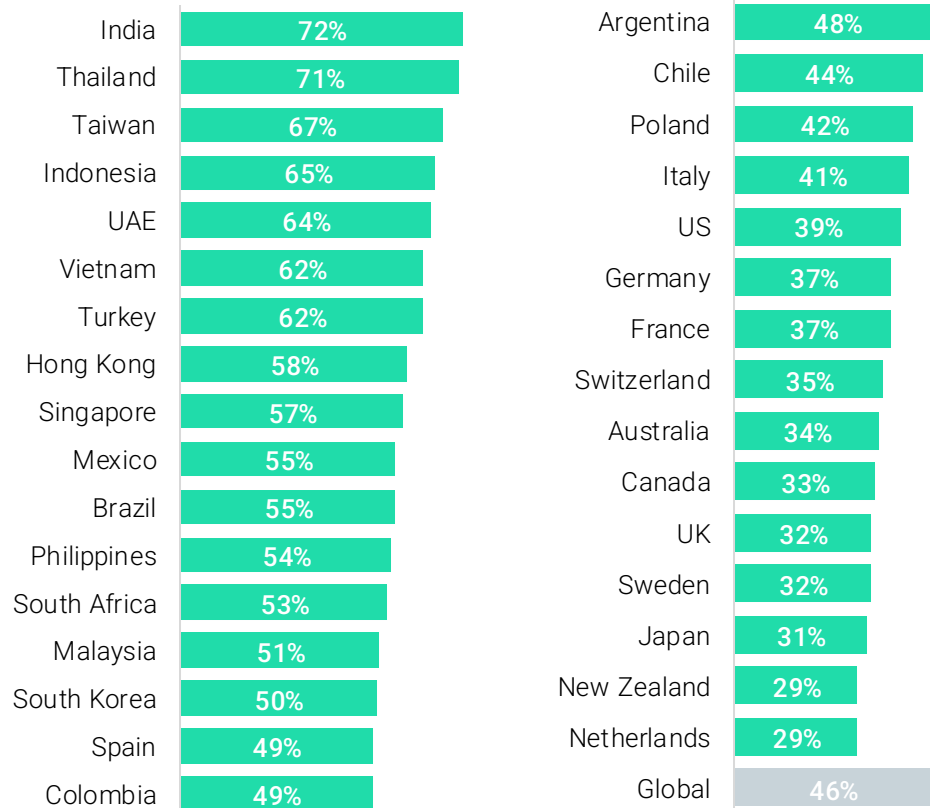
KEY TAKEAWAYS

- + 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)



Employee Desire for AI: Coaching for Growth

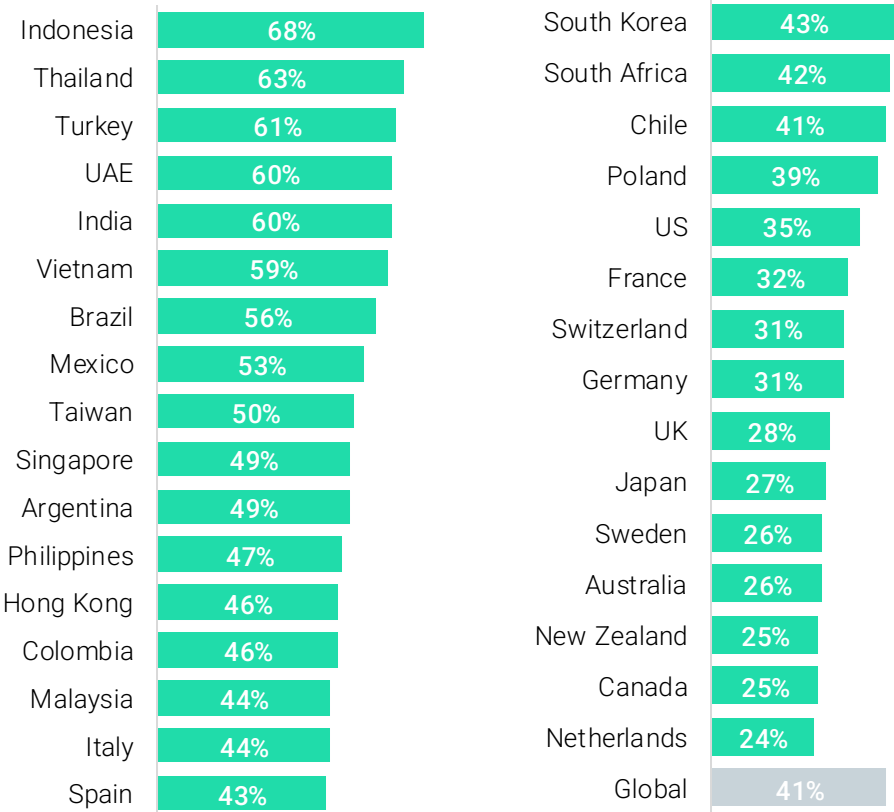
KEY TAKEAWAYS

- + 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 them 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)



Employee Desire for AI: Formal Education

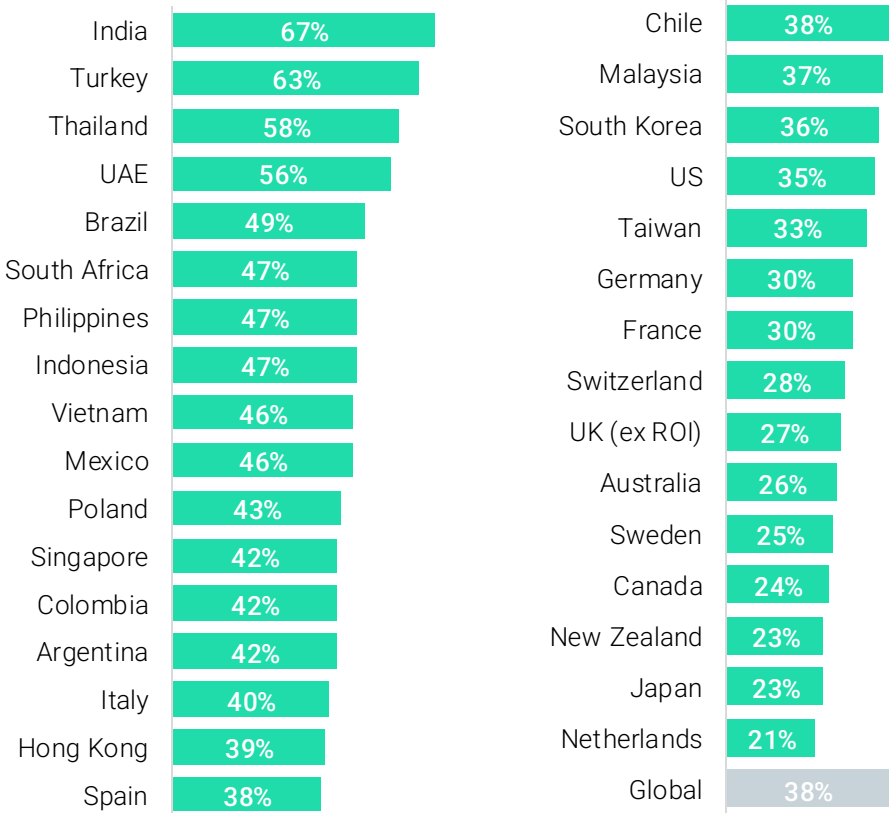
KEY TAKEAWAYS

- + 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)



Employee Desire for AI: Performance Appraisal

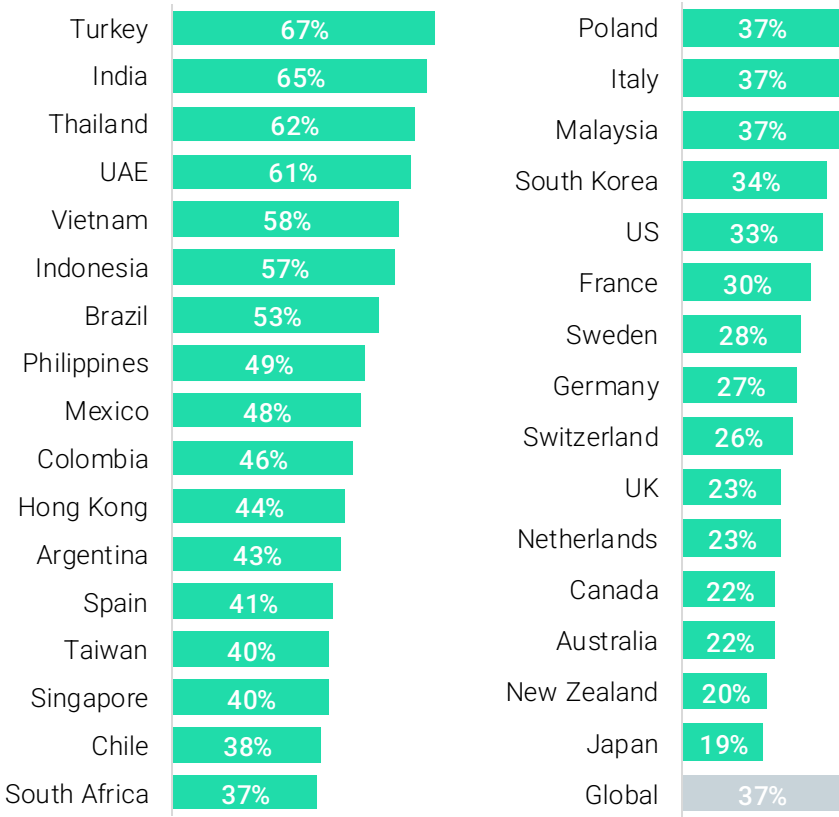
KEY TAKEAWAYS

- + 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)



Employee Desire for AI: Job Interview

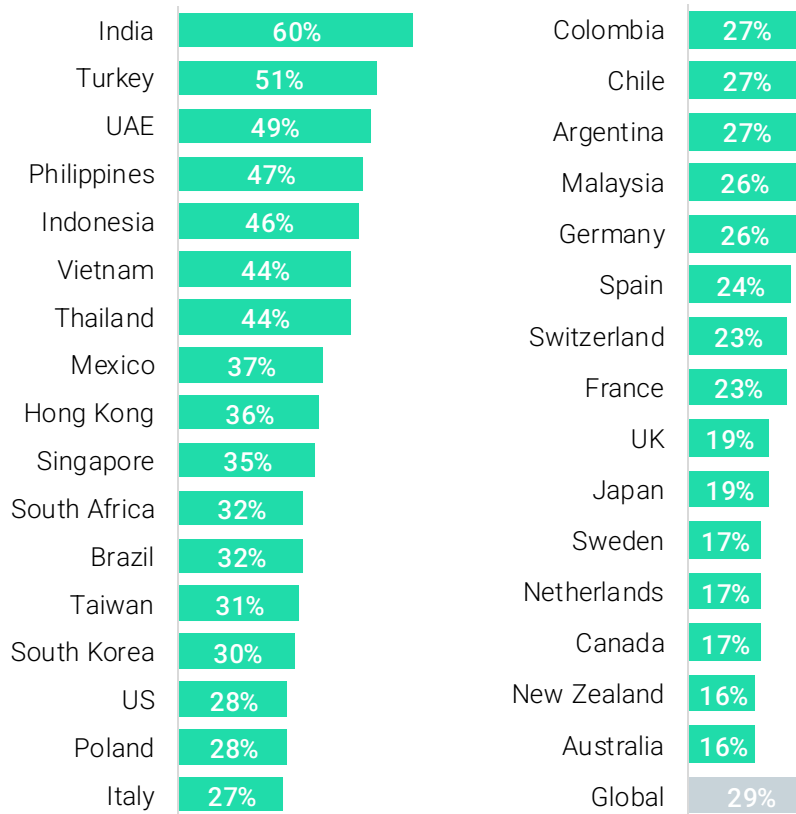
KEY TAKEAWAYS

- + 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)



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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