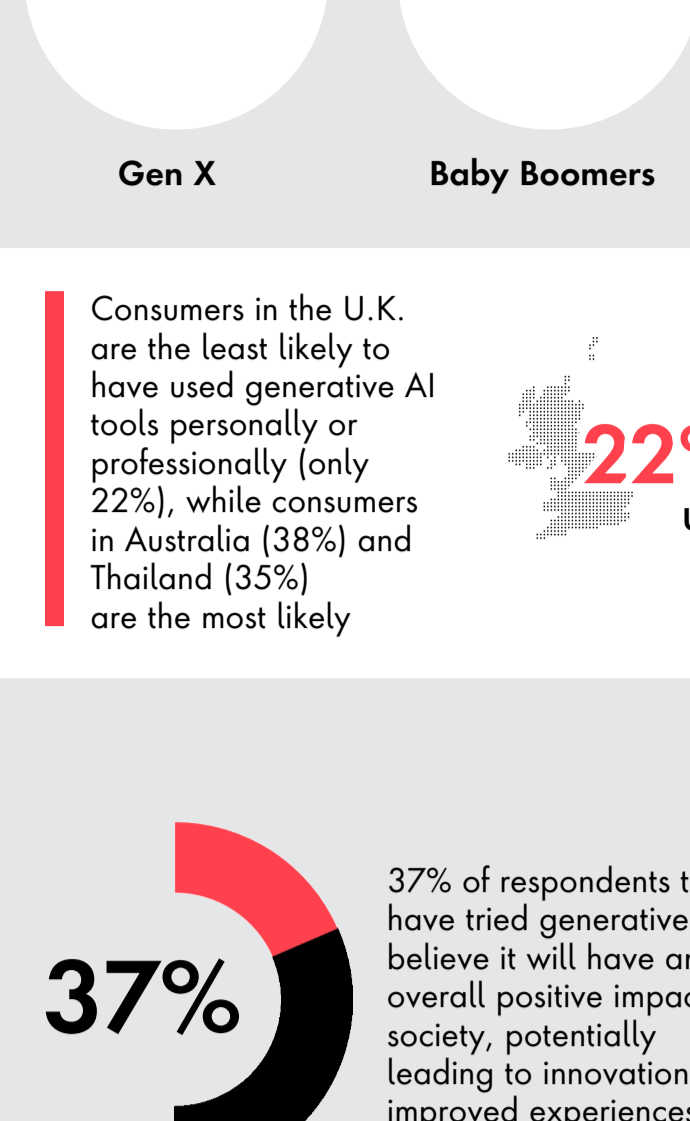




Are Consumers Ready for Generative AI?



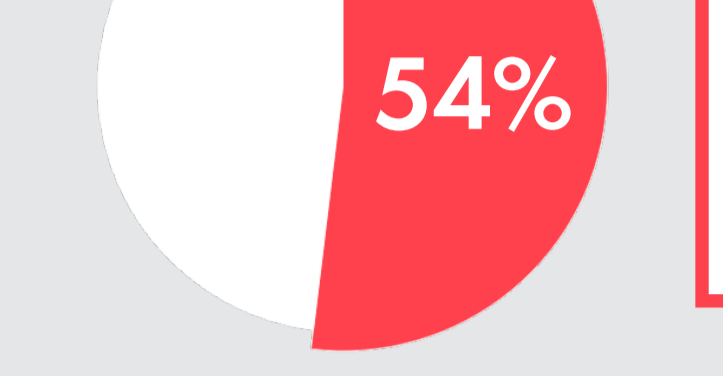
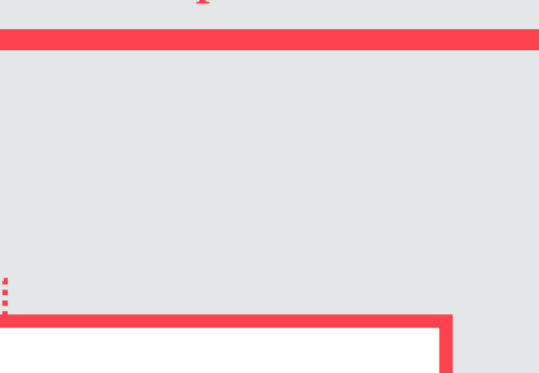
Publicis Sapient conducted a survey of consumers in seven countries to see how they viewed generative AI, and how brands can harness the new technology for the best possible return on investment with customer experience.



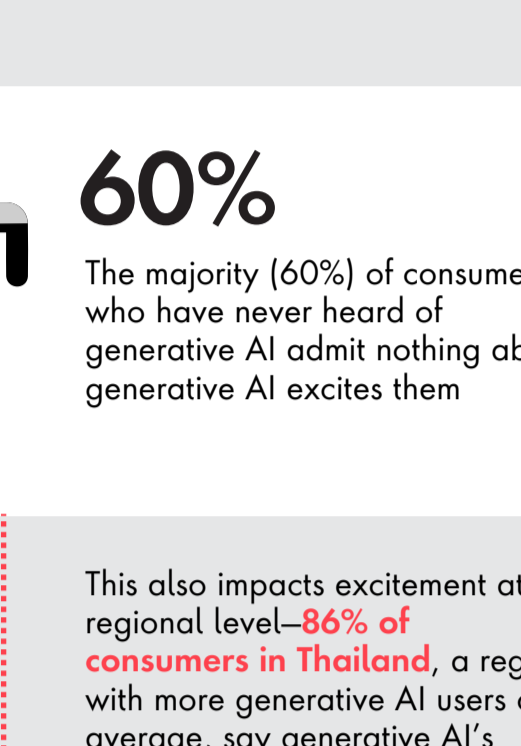
Over half (54%) of Gen Z and 43% of millennials have used generative AI tools both personally and professionally, compared to only 23% of Gen X, 10% of baby boomers



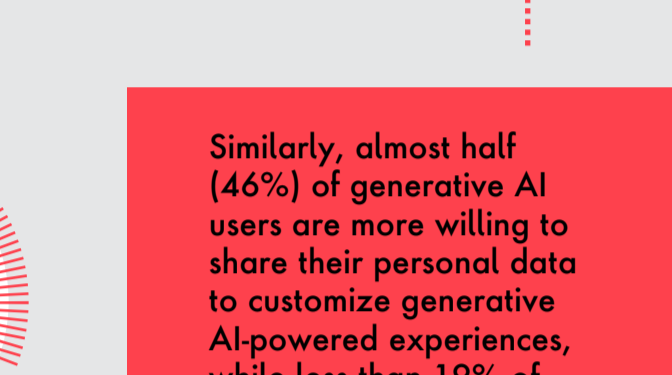
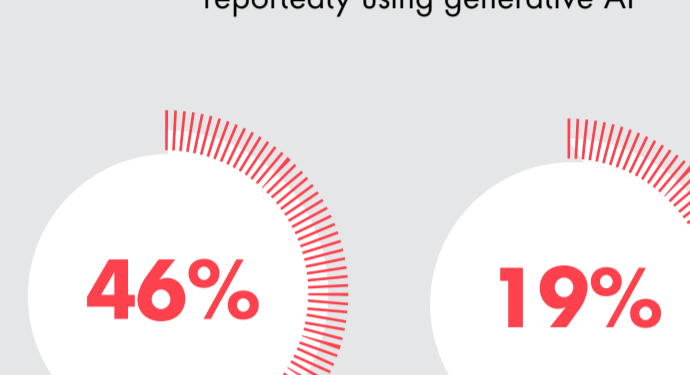
Consumers in the U.K. are the least likely to have used generative AI tools personally or professionally (only 22%), while consumers in Australia (38%) and Thailand (35%) are the most likely



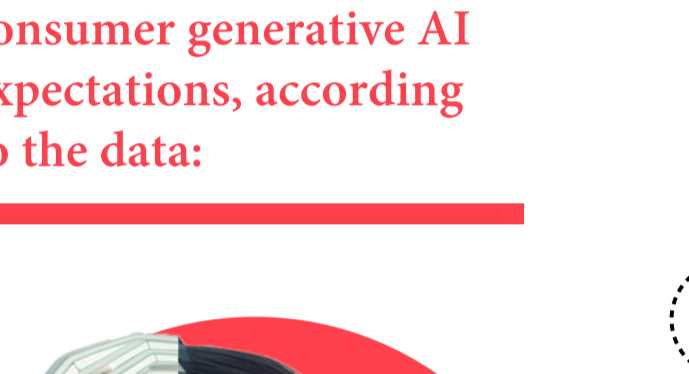
Generative AI users see its positive impact and potential use cases, while non-users are still skeptical



The majority (54%) believe the technology will have both positive and negative consequences for society, with an overall neutral impact



This also impacts excitement at a regional level—**86% of consumers in Thailand**, a region with more generative AI users on average, say generative AI's impact on shopping experiences excites them, compared to only **48% of consumers in the U.K.**, a region with fewer respondents reportedly using generative AI



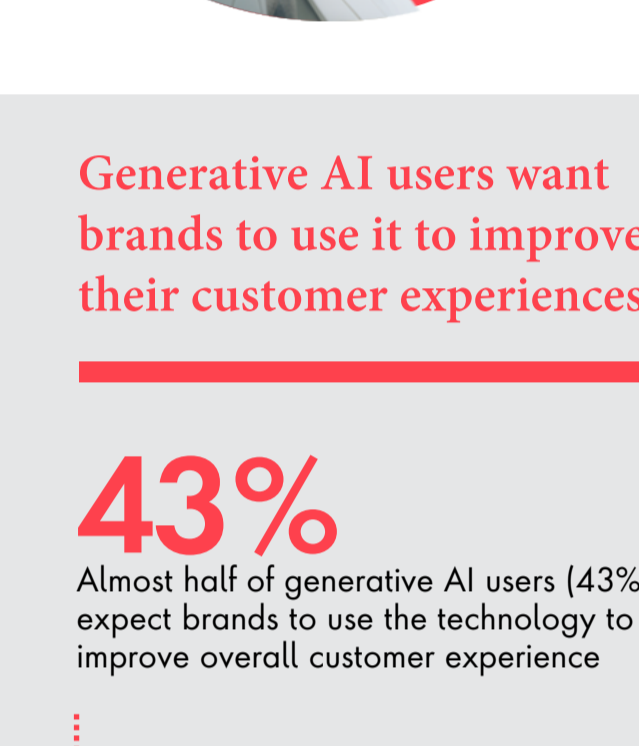
Similarly, almost half (46%) of generative AI users are more willing to share their personal data to customize generative AI-powered experiences, while less than 19% of non-users say the same

Three strategies to cater to consumer generative AI expectations, according to the data:

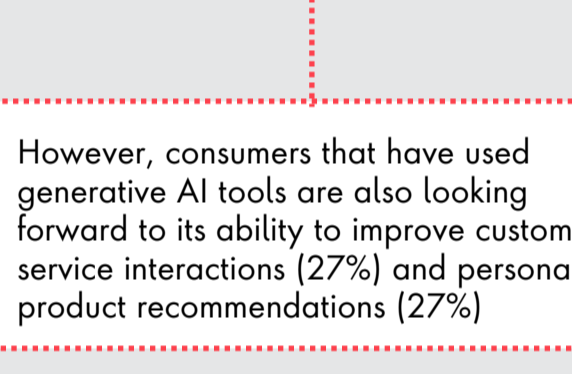
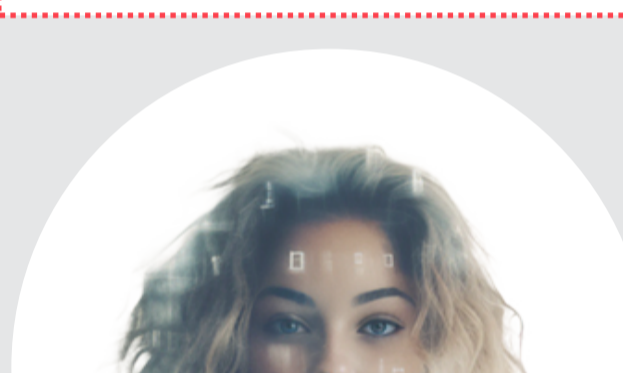
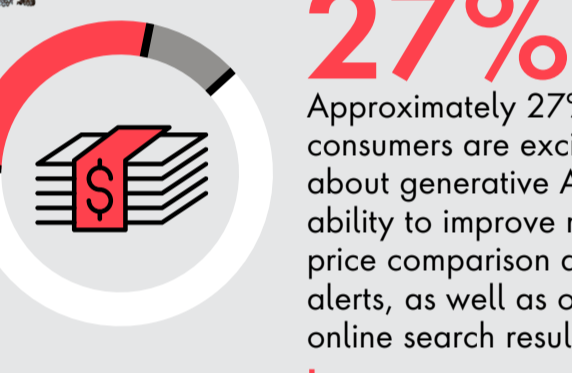
Educate consumers about generative AI
The majority of consumers haven't tried generative AI tools, and new technology integrations may not be intuitive without explanation.

Provide value in exchange for customer data
Help consumers understand how their personal data will make their digital experiences better, especially when it comes to generative AI.

Don't use generative AI without a holistic CX strategy
Most customers don't believe generative AI is valuable on its own. They just want better digital experiences, whether they're powered by generative AI or not.



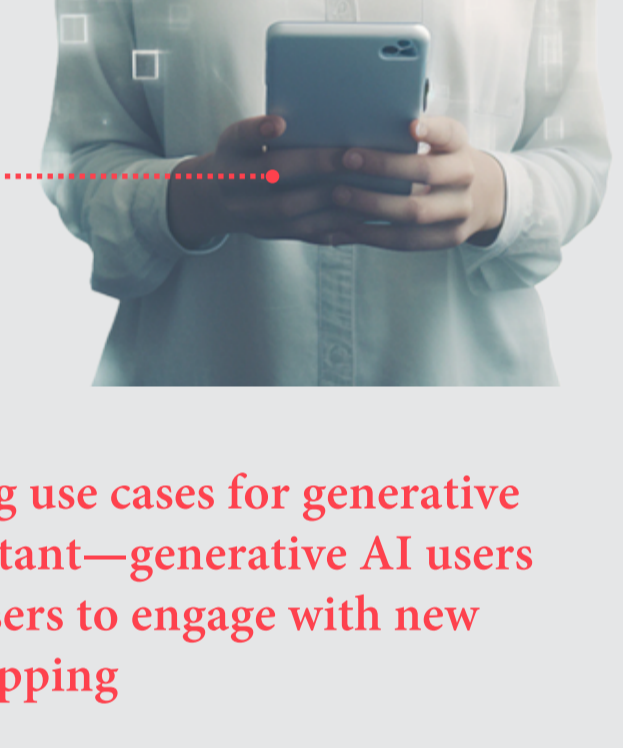
Generative AI users want brands to use it to improve their customer experiences



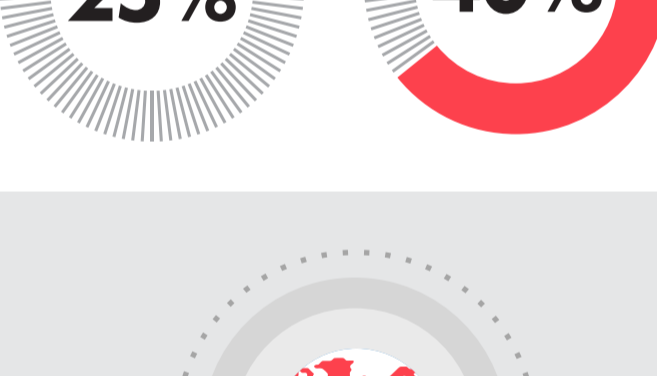
However, consumers in Thailand are **much more likely** than consumers in Germany and Denmark to expect brands to adopt generative AI

However, consumers that have used generative AI tools are also looking forward to its ability to improve customer service interactions (27%) and personalize product recommendations (27%)

Nearly half of generative AI users (45%) are extremely or very likely to use a conversational application of the technology for travel and hospitality shopping



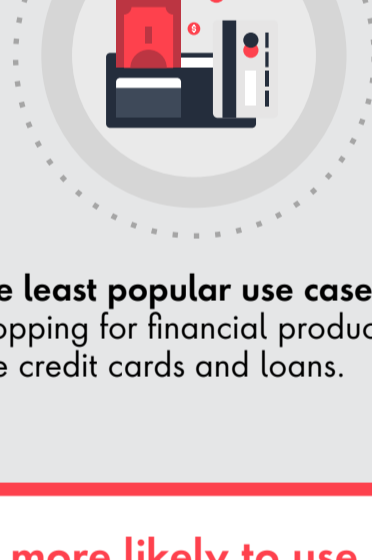
One of the most popular emerging use cases for generative AI is the conversational chat assistant—generative AI users are much more likely than non-users to engage with new applications of these tools for shopping



Roughly 25% of consumers would use a conversational virtual shopping assistant powered by generative AI for a variety of goods and services, compared to roughly 40% of generative AI users



The most popular use case for conversational shopping is travel-related, including researching destinations and accommodations.



The least popular use case is shopping for financial products, like credit cards and loans.

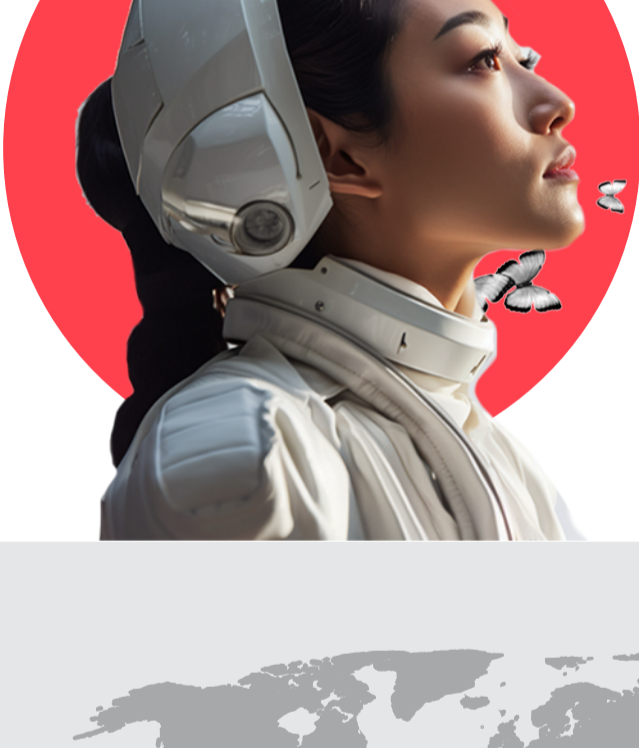
Gen Z and millennials are much more likely to use these tools than consumers in older generations—and men are generally more interested than women

Three strategies to harness generative AI for customer experience, according to the data:

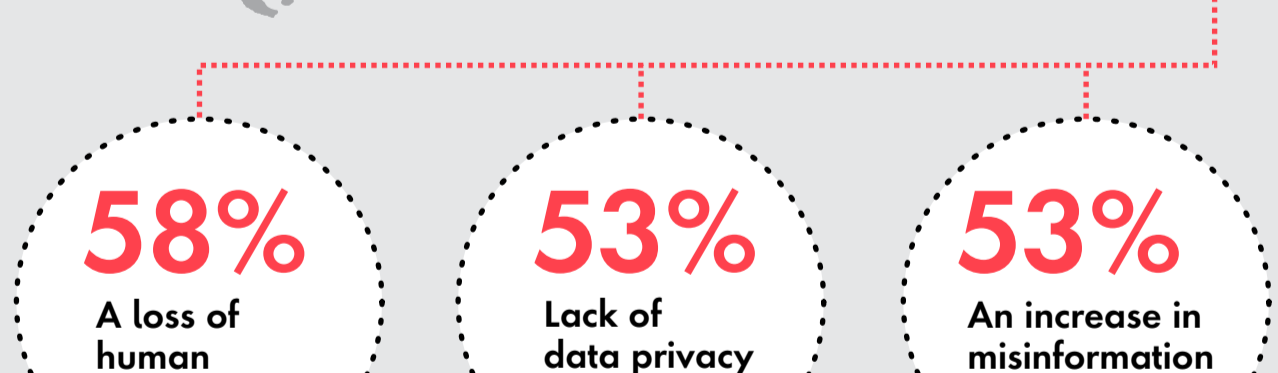
Focus on product research and discovery
The top use case for both generative AI experts and novices is faster and more accurate search results.

Understand inflation's impact
Saving money is top of mind for most consumers, and consumers crave efficient ways to find the best deals.

Invest in generative AI-powered customer service
Those familiar with generative AI are hoping it can automate and personalize customer service interactions, including product returns and exchanges.

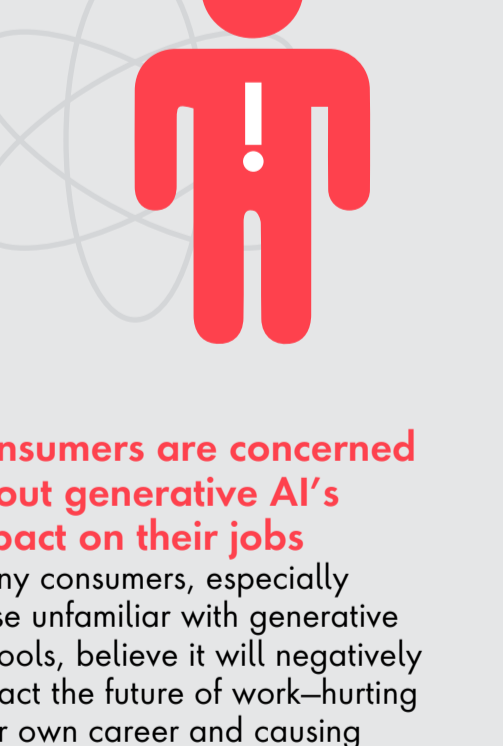


Globally, the majority of consumers across regions and demographics are concerned that generative AI will cause:



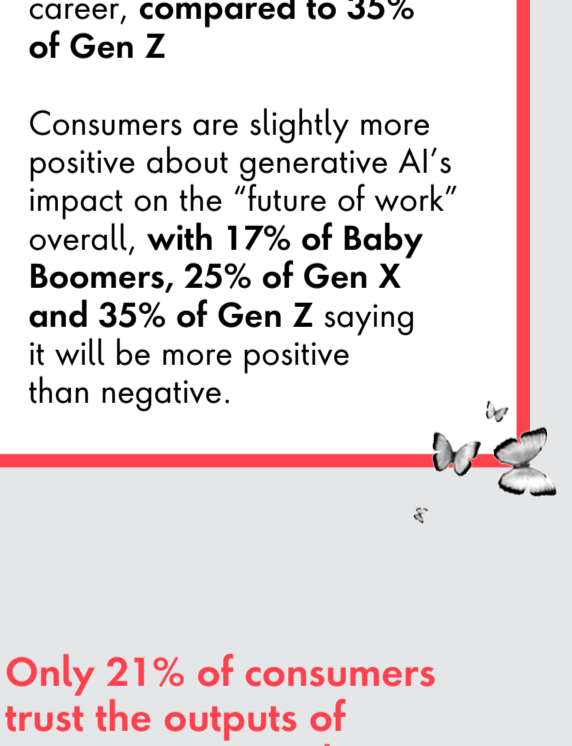
Consumers are concerned about generative AI's impact on their jobs
Many consumers, especially those unfamiliar with generative AI tools, believe it will negatively impact the future of work—hurting their own career and causing widespread job loss

- **Almost half of global consumers (42%)** are concerned that generative AI's acceleration will cause job loss for themselves and/or others
- **Only 16% of Gen B Boomers and 18% of Gen X** believe that generative AI will have a positive impact on their career, **compared to 35% of Gen Z**
- Consumers are slightly more positive about generative AI's impact on the "future of work" overall, **with 17% of Baby Boomers, 25% of Gen X and 35% of Gen Z** saying it will be more positive than negative.



Only 21% of consumers trust the outputs of generative AI tools
While generative AI users are slightly more trusting of the tools, the majority are still concerned about content produced by generative AI and the safety of the tools themselves

European consumers are particularly concerned about these risks, compared to consumers in Australia, Thailand and the U.S.



Three strategies to ensure ethical generative AI implementation, according to the data:

Create rules for new tools to promote accuracy
In order to quell doubt and frustration over inaccurate responses from generative AI chat tools, invest in development of guardrails for large language models (LLMs).

Protect and secure private consumer and/or client data
Generative AI tools like chatbots or conversational search have the potential to reveal sensitive customer information without the proper security.

Establish transparency around data sourcing
Clear communication around where the data feeding generative AI tools is coming from can reduce customer frustration and confusion and increase trust in outputs.



ABOUT THE RESEARCH

YouGov administered the survey among 10,957 consumers across the U.S., the U.K., Australia, France, Denmark, Germany and Thailand. Conducted in September 2023, the purpose of the research was to help companies understand where and how they should invest in the generative AI space based on what global consumers are most interested in. The data is meant to help brands evolve their business operations and forge lasting customer relationships through new technology.