



DATA SNAPSHOT

Consumer Sentiment Toward AI Evolves, 2025

Global Research Report

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Executive Summary

KEY FINDINGS IN THIS REPORT

As part of our most recent global consumer study, we asked nearly 24,000 consumers from 23 countries about their attitude toward companies using artificial intelligence, including their comfort levels, concerns, and current usage. From their responses, and data collected from our 2023 global consumer study, we found that:

- + **Comfort using AI has declined.** Compared to the results from last year's study, consumers this year are 10.5 points less comfortable using AI to complete five common activities. Comfort using AI has declined the most among New Zealanders (-24.8 pts) and among consumers globally when getting *advice about a medical problem* (-12.5 pts). Comfort has increased in only one country: China (+6.6 pts.)
- + **While few consumers trust organizations to use AI in the abstract, specific use cases invite more positive sentiment.** Globally, just 26% of consumers say they trust organizations to use AI responsibly, with a high of 67% among Indian consumers and a low of 10% among the Japanese. However, when asked about their comfort using AI to complete five common activities like *checking order status* or *getting medical advice*, an average of 46% of consumers say they'd be comfortable using an organization's AI to do so.
- + **Concerns over human connection have increased.** While consumers are slightly less concerned about several things, like *poor quality of interactions* (-4.3 pts) and *extra effort in the interaction* (-1.2 pts), concerns have increased about *lack of a human being to connect with* (+2.1 pts), a concern now shared by more than half of consumers.
- + **AI usage coincides with greater comfort and fewer concerns...with an exception.** Consumers that have recently used AI once or more are significantly more likely to say they are comfortable using an organization's AI to complete common activities compared to those that haven't used AI. This population is also less likely to harbor most concerns toward AI, except for one – they are 3.3 points more likely to be concerned about *extra effort [for them] in the interaction*.

STUDY KEY FACTS

- Global consumer study
- Online panel study
- Conducted in Q3 of 2024
- 23,730 consumers
- 23 countries/regions

Consumer Sentiment Toward AI Evolves, 2025

STUDY OVERVIEW

The data for this report comes from a global consumer study that Qualtrics XM Institute conducted in the third quarter of 2024. Using an online survey, XM Institute collected data from 23,730 consumers across 23 countries/regions: Australia, Brazil, Canada, China, Denmark, France, Germany, Hong Kong (China), India, Ireland, Italy, Japan, Mexico, the Netherlands, New Zealand, the Philippines, Singapore, South Korea, Spain, Sweden, the United Arab Emirates, the United Kingdom, and the United States.

XM Institute surveyed approximately 1,200 consumers from each of the countries except those listed below. 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.

The following countries' approximate sample sizes are as follows:

Hong Kong (China): 400. New Zealand: 600. the Philippines: 660. Ireland: 700. Denmark, Singapore, and the UAE: 800.

FIGURES IN THE REPORT

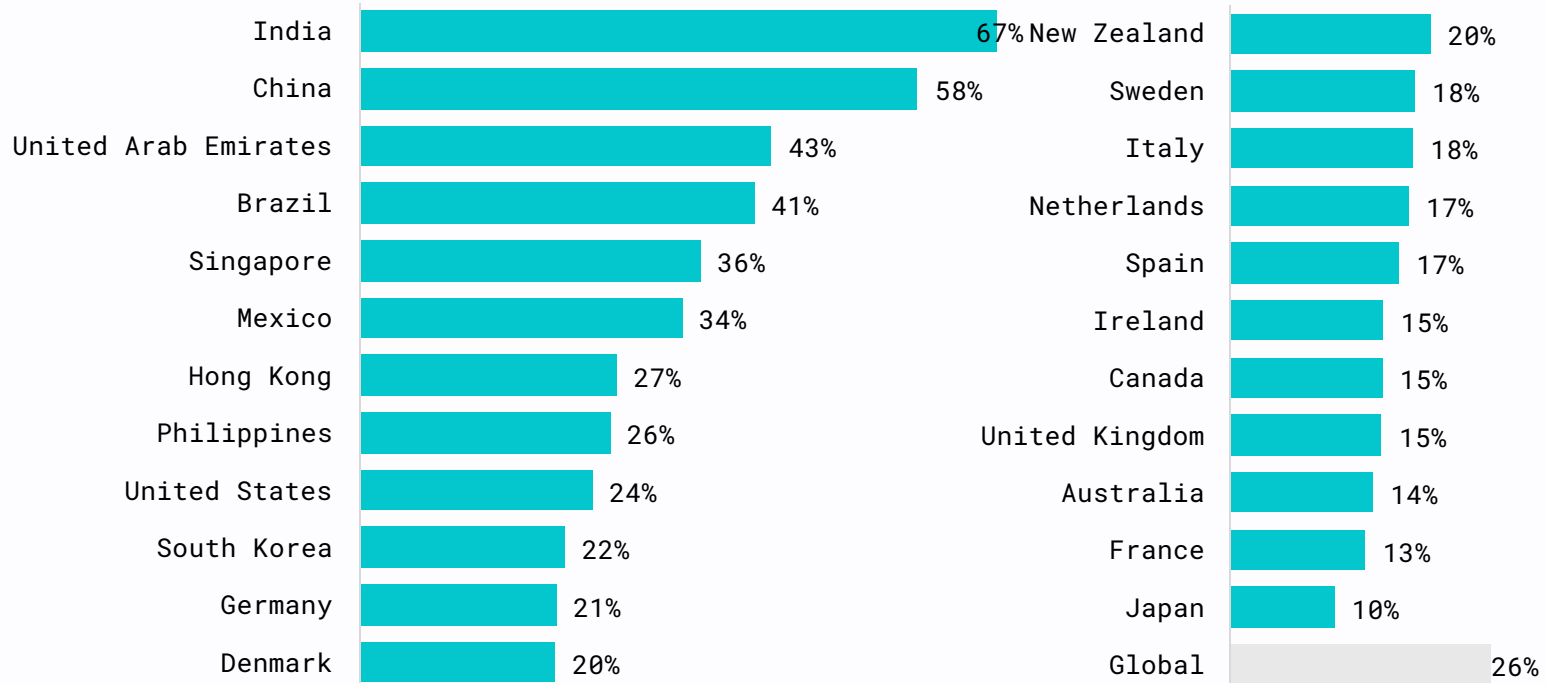
1. Trust in Organizations to Use AI Responsibly
2. Expectations for Easy Interactions with AI
3. Concerns with AI
4. Concerns with AI by Usage
5. Concerns with AI by Country
6. Usage of AI
7. Comfort with AI
8. Change in Overall Comfort with AI by Country
9. Comfort with AI by Usage
10. Comfort Getting Medical Advice
11. Comfort Booking an Airplane Ticket
12. Comfort Checking Order Status
13. Comfort Getting Tech Support
14. Comfort Resolving Billing Issues

Methodology

Trust in Organizations to Use AI Responsibly

To what degree do you trust organizations to use AI responsibly?

(mostly or completely trust)

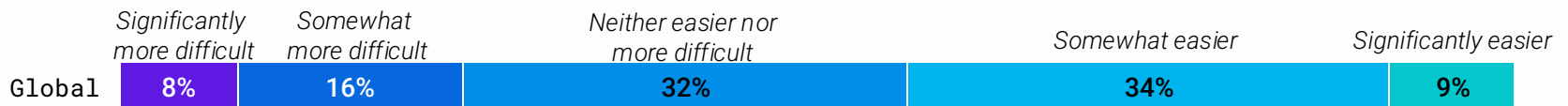
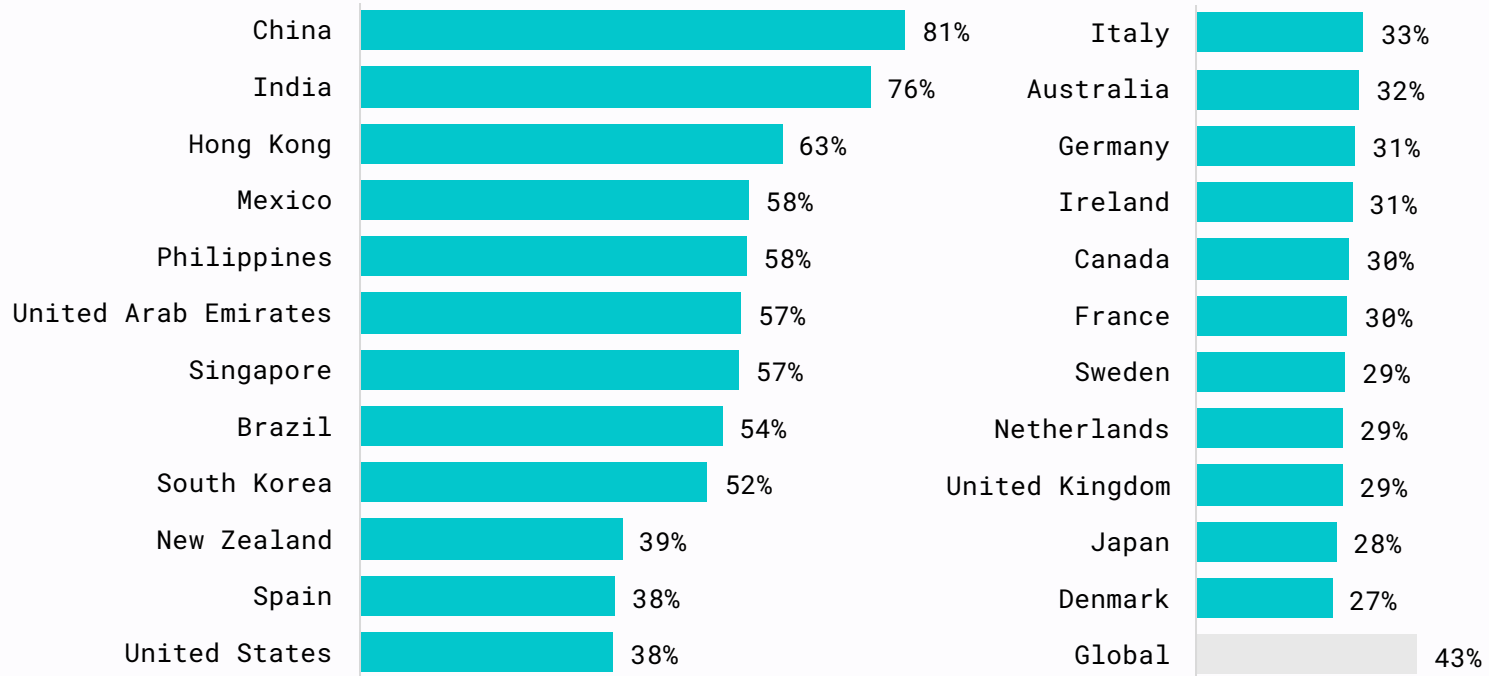


Base: 23,730 consumers across 23 countries

Source: Qualtrics XM Institute Q3 2024 Global Consumer Study

Expectations for Easy Interactions with AI

To what degree do you think AI will change the ease of your interactions with organizations?
(somewhat or significantly easier)



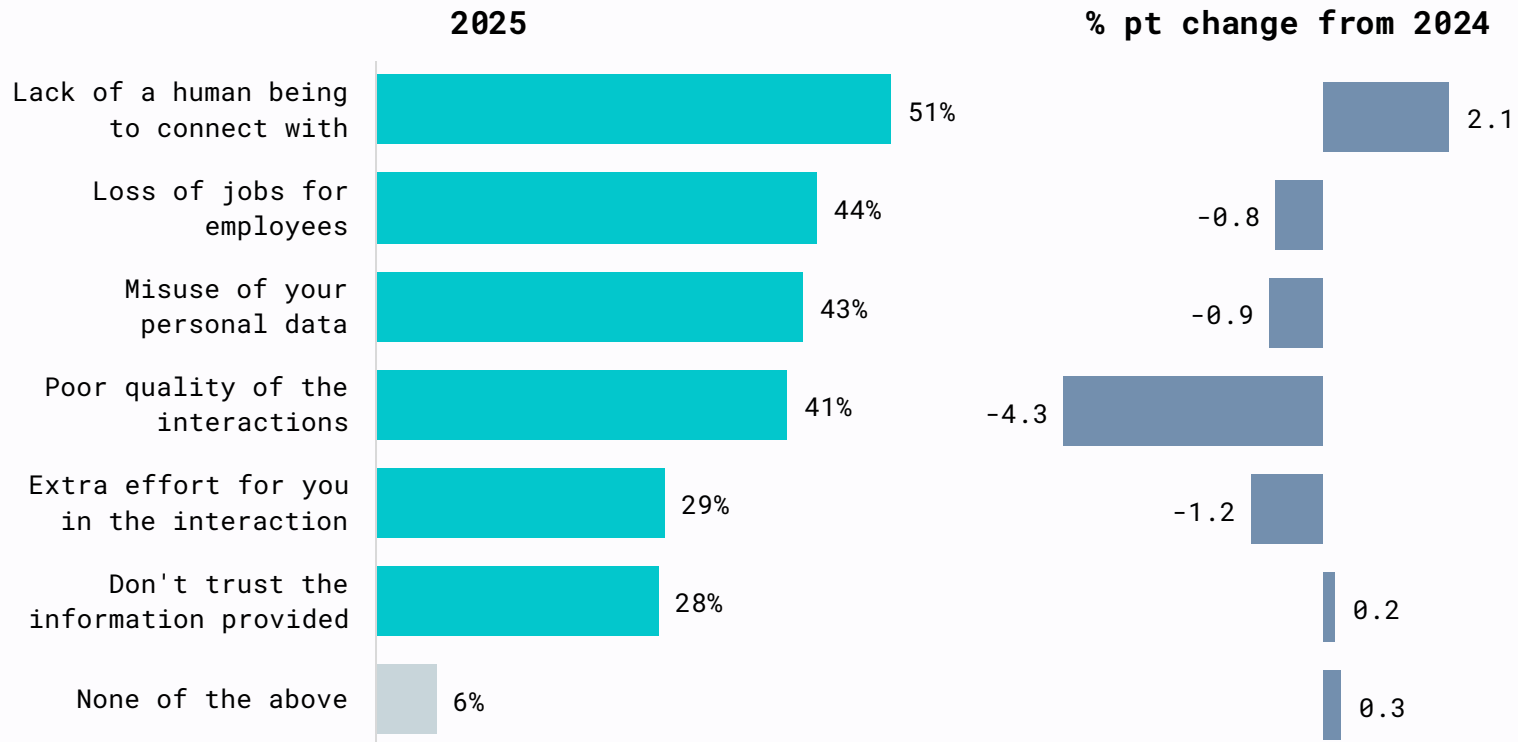
Base: 23,730 consumers across 23 countries

Source: Qualtrics XM Institute Q3 2024 Global Consumer Study

Concerns with AI

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

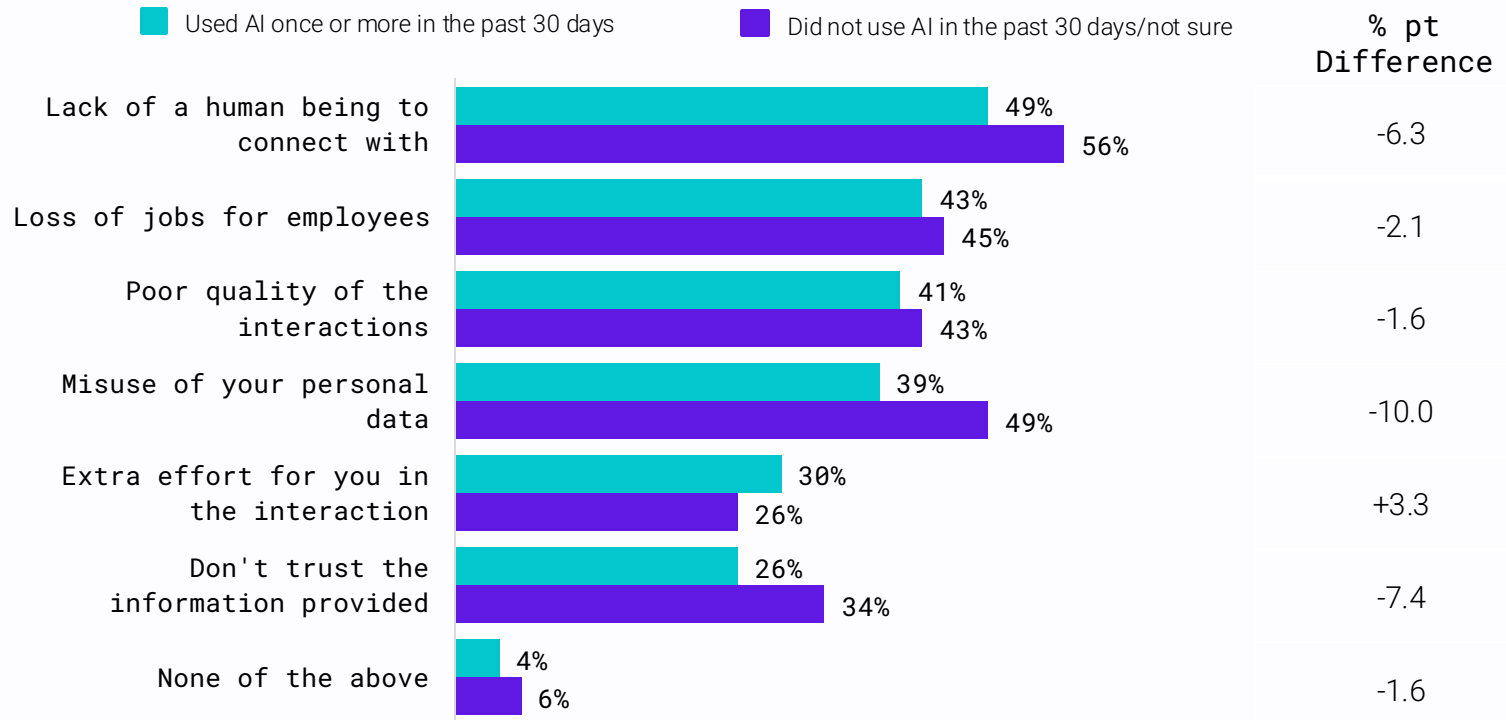
(Select all that apply)



Concerns with AI by Usage

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

(Select all that apply)



Concerns with AI by Country

□ most common

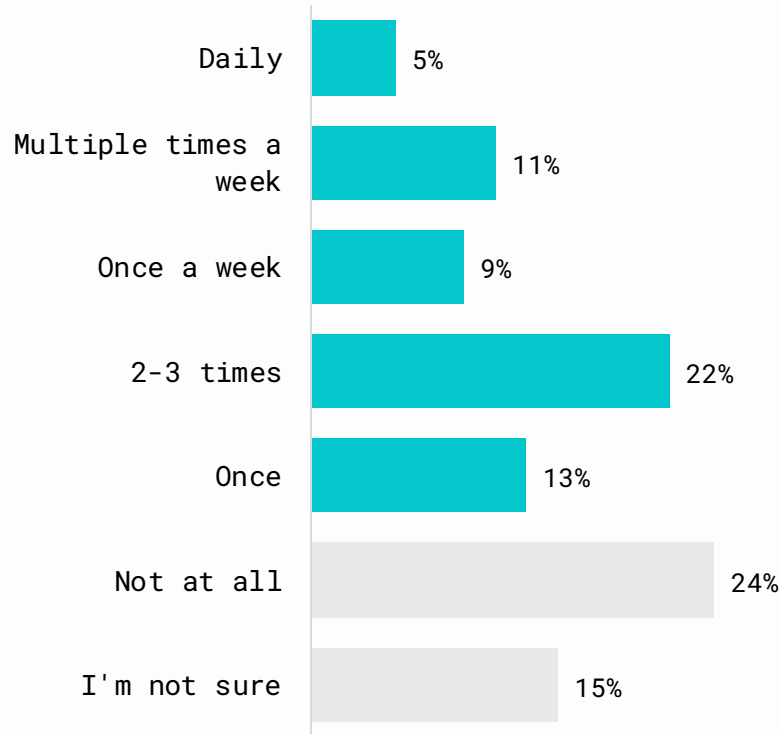
	Lack of a human to connect with	Loss of jobs for employees	Misuse of your personal data	Poor quality of interactions	Extra effort for you in the interaction	Don't trust info provided	None of the above
Australia	61%	54%	56%	48%	37%	42%	4%
Brazil	45%	49%	52%	37%	21%	28%	5%
Canada	59%	52%	49%	50%	36%	39%	5%
China	25%	30%	31%	29%	24%	11%	29%
Denmark	52%	40%	36%	50%	26%	36%	5%
France	50%	45%	47%	35%	19%	22%	6%
Germany	49%	44%	43%	39%	22%	29%	7%
Hong Kong (China)	53%	25%	41%	42%	32%	17%	2%
India	59%	53%	43%	34%	43%	19%	5%
Ireland	63%	52%	48%	48%	33%	31%	5%
Italy	51%	37%	33%	31%	19%	22%	5%
Japan	31%	27%	47%	48%	22%	29%	6%
Mexico	40%	47%	48%	32%	20%	24%	3%
Netherlands	48%	37%	32%	44%	24%	29%	8%
New Zealand	60%	55%	50%	48%	33%	38%	4%
Philippines	61%	52%	41%	41%	29%	20%	4%
Singapore	52%	41%	49%	44%	38%	29%	7%
South Korea	46%	39%	34%	34%	34%	17%	3%
Spain	55%	48%	44%	34%	20%	35%	4%
Sweden	52%	41%	35%	52%	27%	39%	6%
United Arab Emirates	47%	43%	25%	32%	38%	18%	6%
United Kingdom	63%	48%	46%	49%	34%	35%	4%
United States	57%	49%	50%	43%	33%	38%	7%

Base: 23,730 consumers across 23 countries

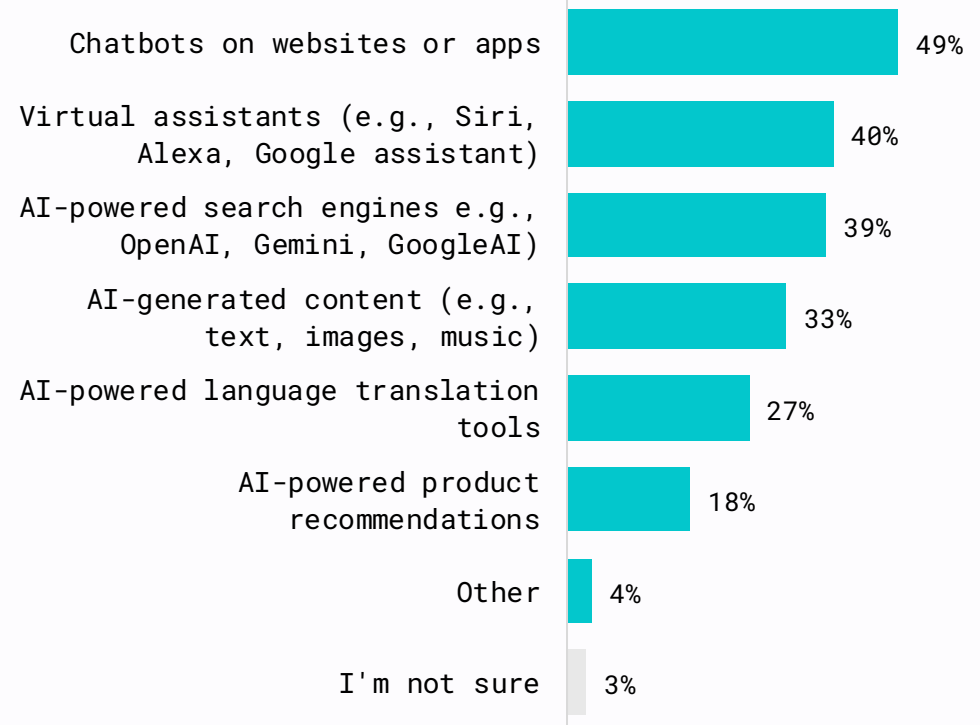
Source: Qualtrics XM Institute Q3 2024 Global Consumer Study

Usage of AI

How frequently have you interacted with an AI system or product in the previous 30 days?

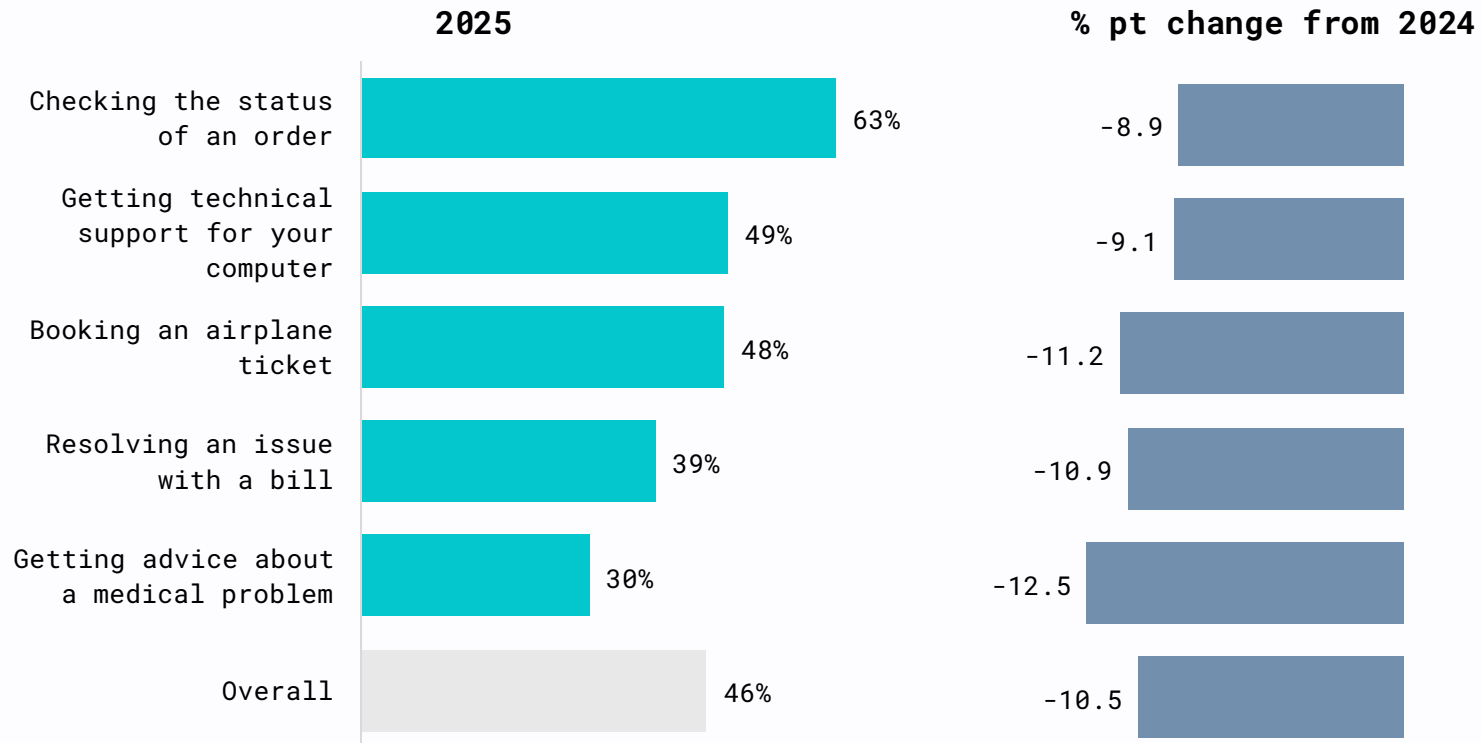


Which of the following AI systems or products have you interacted with in the previous 30 days? (of those that interacted with AI once or more)



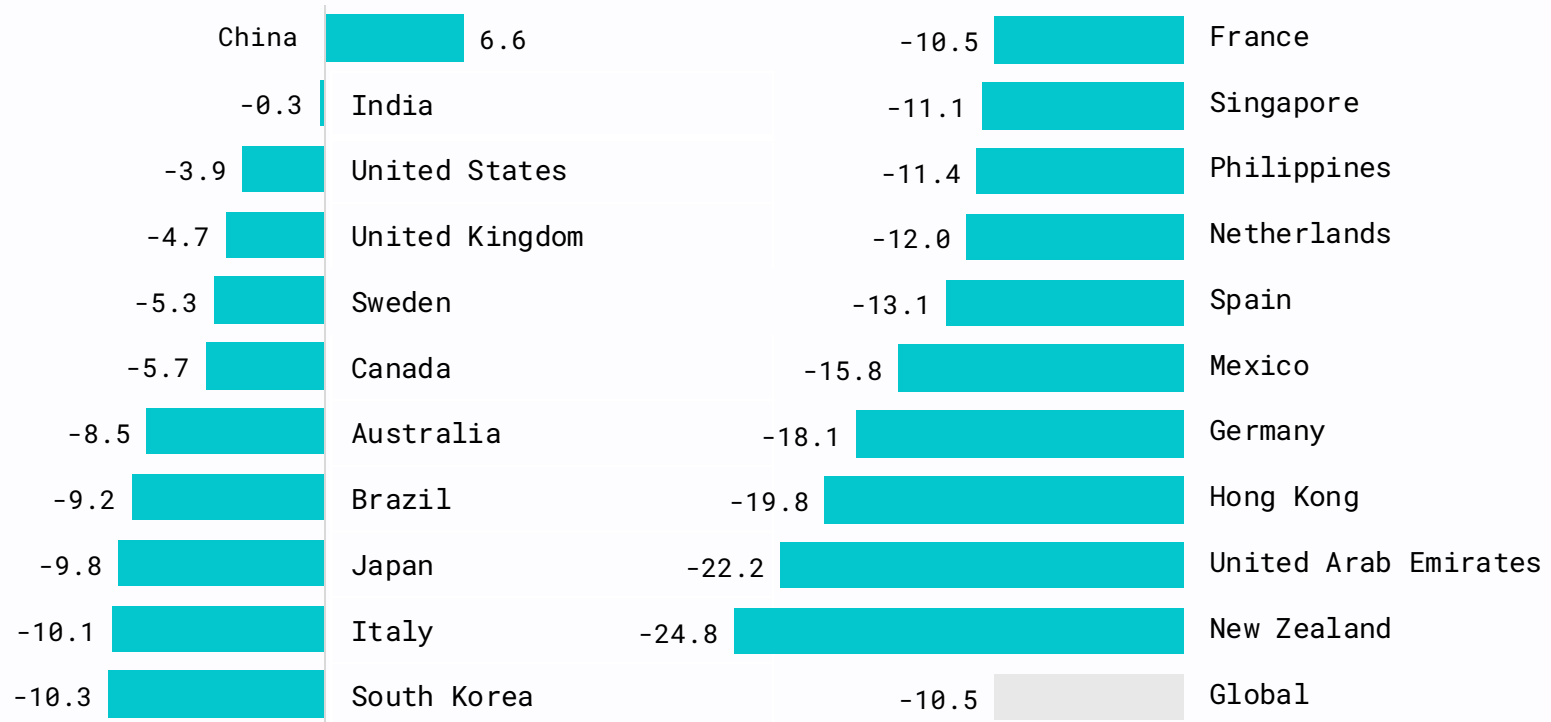
Comfort with AI

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



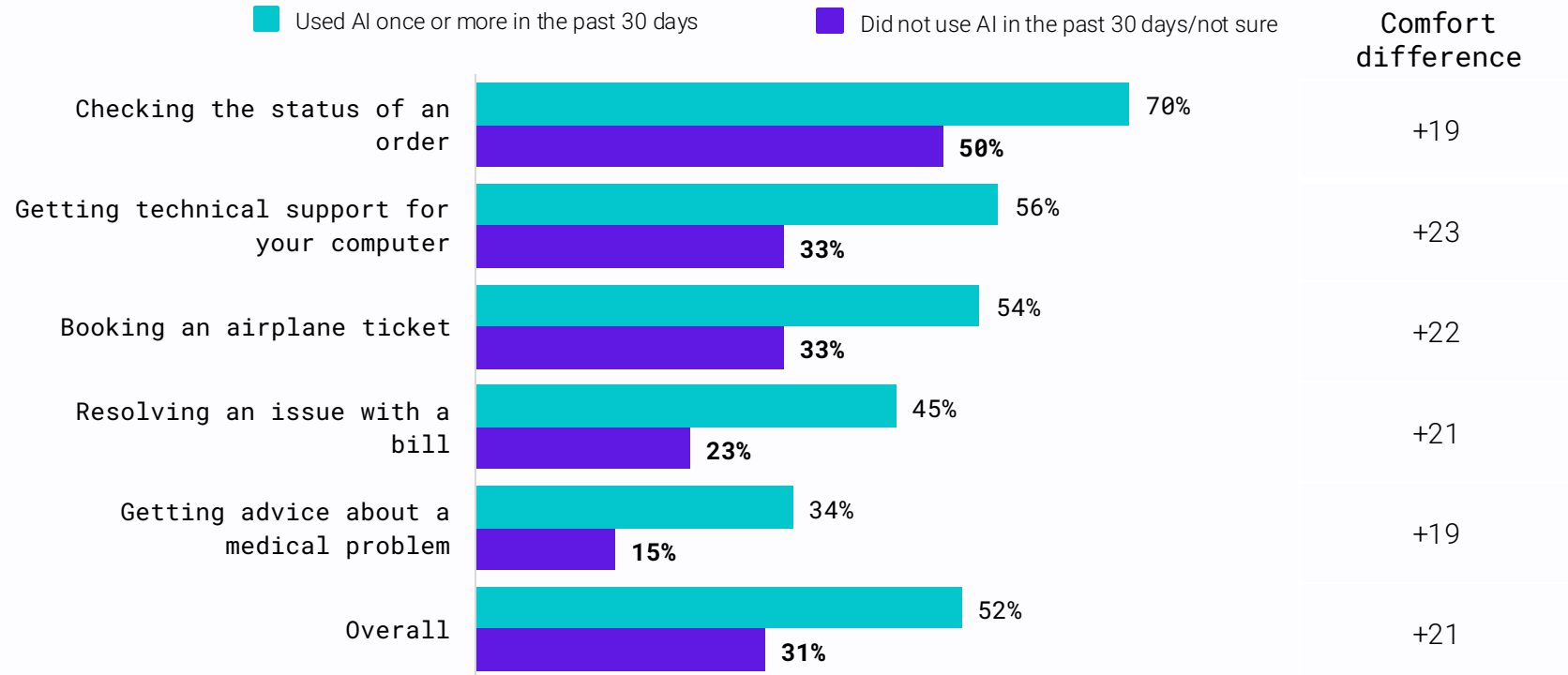
Change in Overall Comfort with AI by Country

Comfort using an organization's AI to complete 5 common activities
(average across 5 activities, percentage point change from 2024 to 2025)



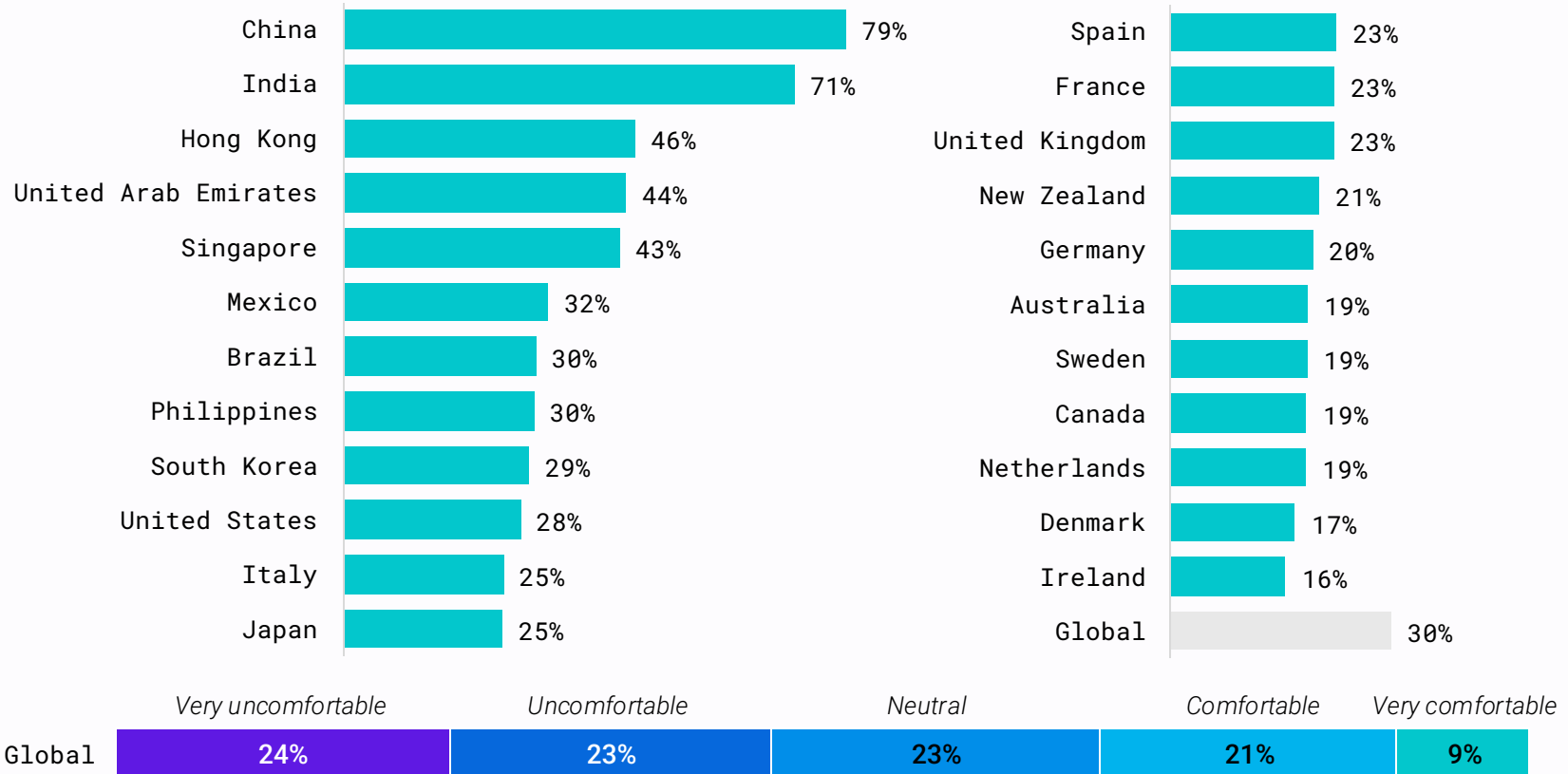
Consumer Comfort with AI by Usage

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



Comfort Getting Medical Advice

Comfort getting advice about a minor medical issue (comfortable or very comfortable)

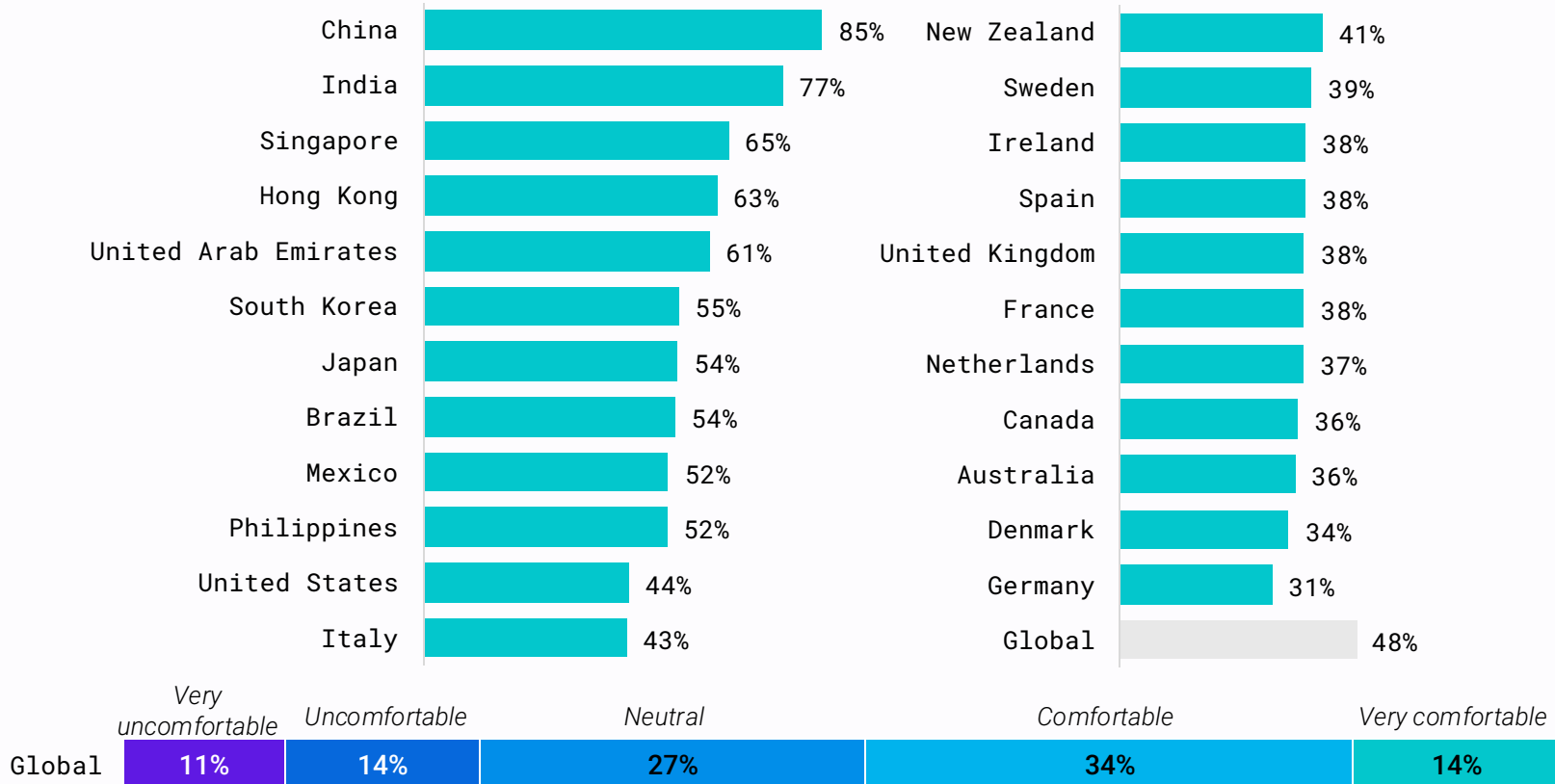


Base: 23,730 consumers across 23 countries

Source: Qualtrics XM Institute Q3 2024 Global Consumer Study

Comfort Booking an Airplane Ticket

Comfort booking an airplane ticket
(comfortable or very comfortable)

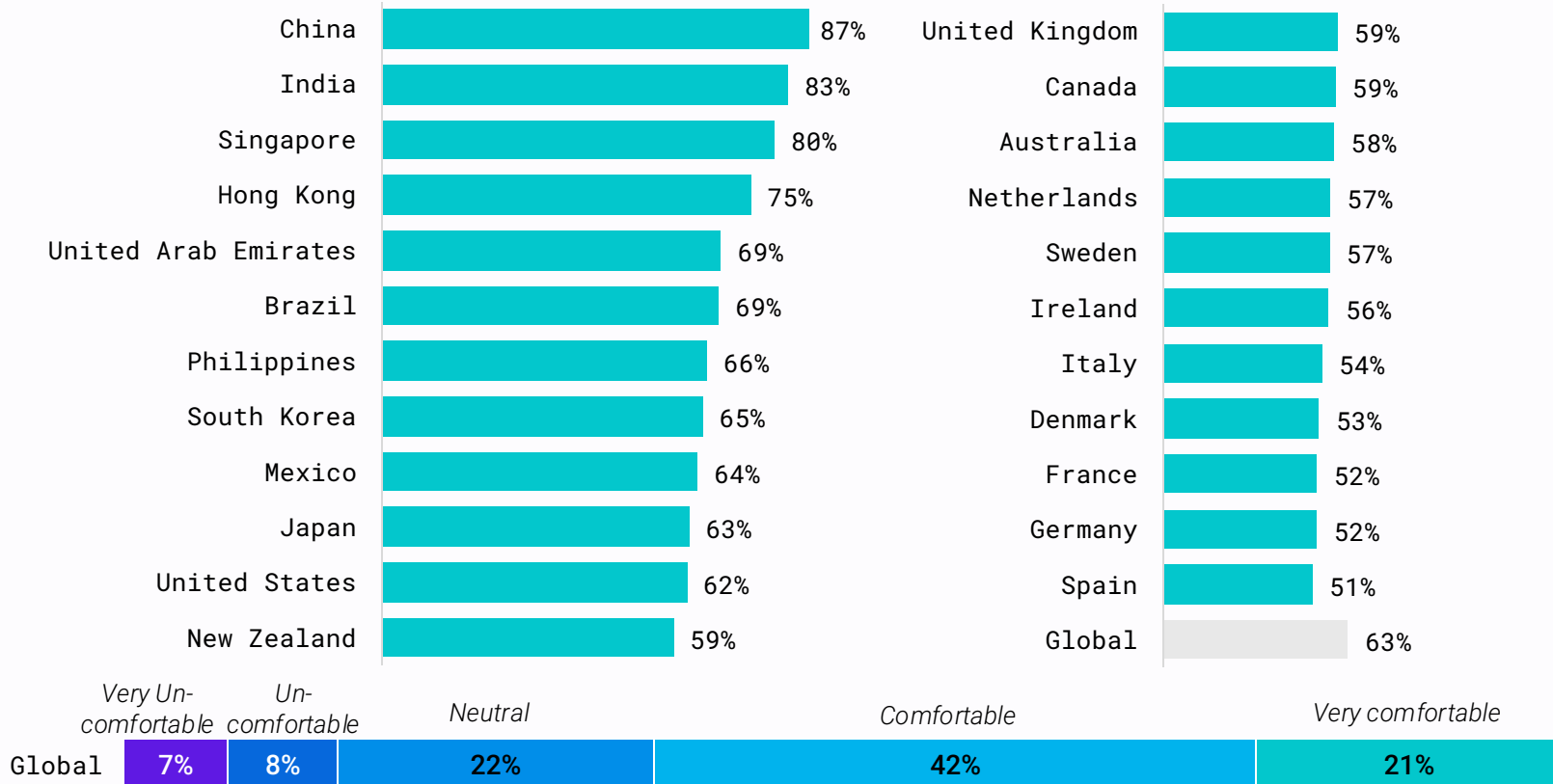


Base: 23,730 consumers across 23 countries

Source: Qualtrics XM Institute Q3 2024 Global Consumer Study

Comfort Checking Order Status

Comfort checking the status of an order (comfortable or very comfortable)

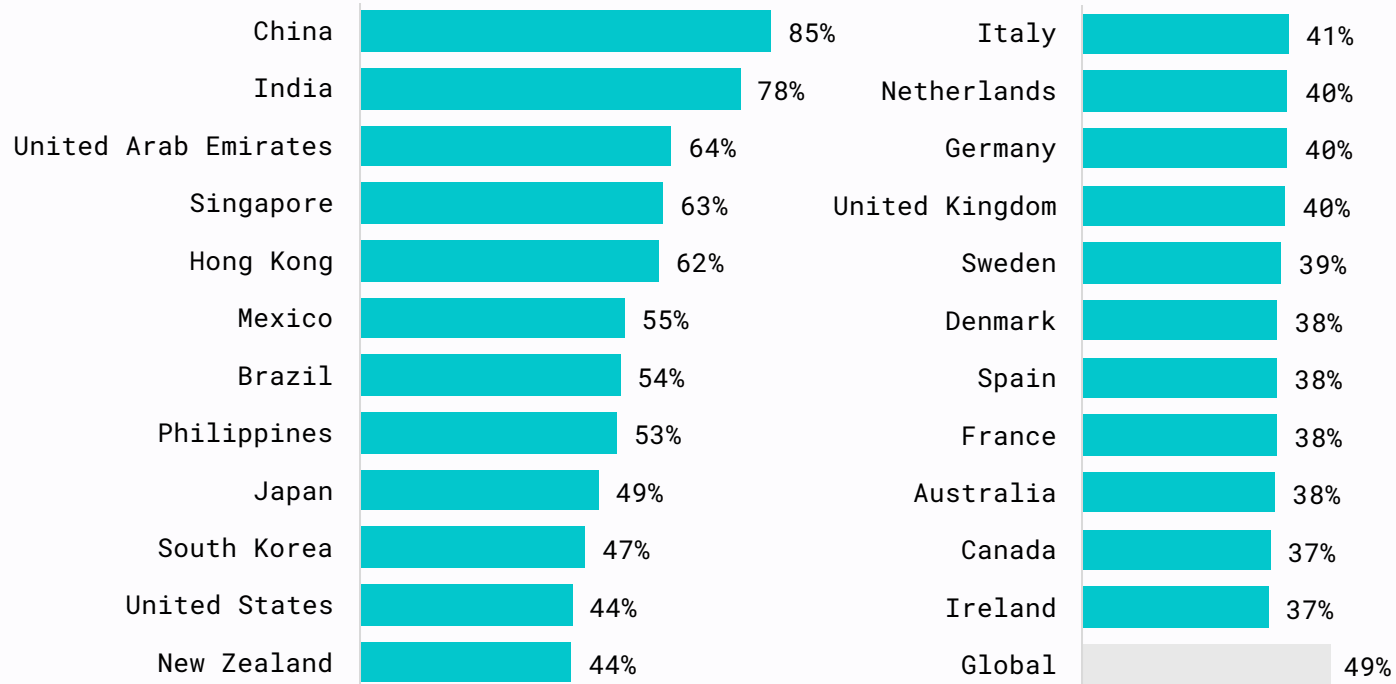


Base: 23,730 consumers across 23 countries

Source: Qualtrics XM Institute Q3 2024 Global Consumer Study

Comfort Getting Tech Support

Comfort getting technical support for your computer (comfortable or very comfortable)

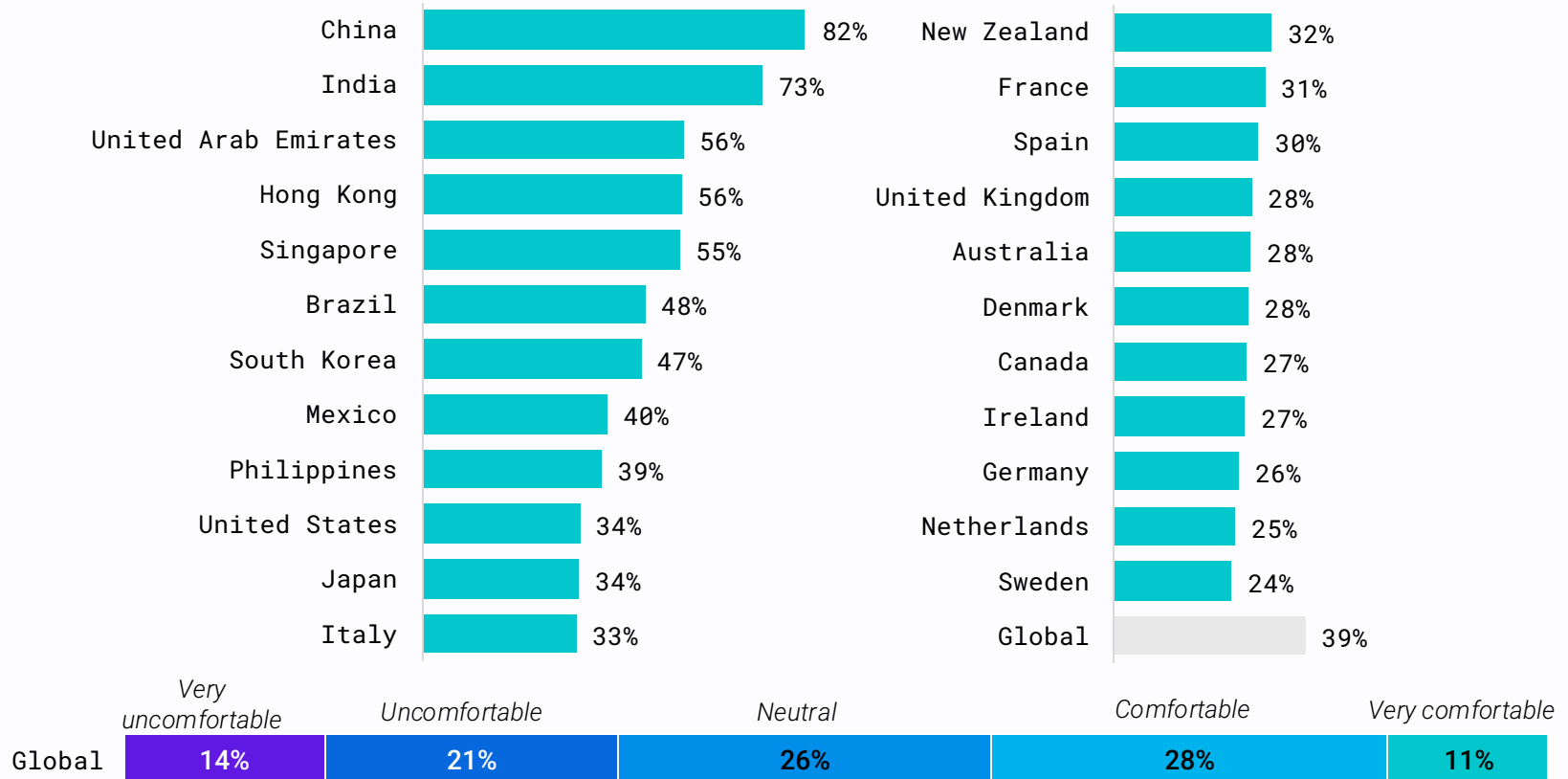


Base: 23,730 consumers across 23 countries

Source: Qualtrics XM Institute Q3 2024 Global Consumer Study

Comfort Resolving Billing Issues

Comfort resolving billing issues
(comfortable or very comfortable)



Base: 23,730 consumers across 23 countries

Source: Qualtrics XM Institute Q3 2024 Global Consumer Study

DATA CALCULATION

Data is only reported on and analyzed from segments with 100+ responses per country/region.

Year-over-year analysis only includes the 20 countries from which data was collected in both 2023 and 2024, which does not include Denmark, Ireland, and Sweden.

Global figures are an average across all included countries.

Questions asked to create **Figures 1, 2,** and **7-14** use 5-point question-specific Likert scales.

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