



GenAI: What consumers want

Consumers demand
businesses take a responsible
approach to generative AI

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Foreword

Ever since OpenAI unleashed ChatGPT on the world in late 2022, the excitement around generative AI has been building. And yet, amid all the bluster, there's a nagging doubt: few business leaders truly appreciate what consumers want from the technology.

That's why I got my marketing colleagues at Thoughtworks to investigate.

We commissioned a global survey to understand consumer attitudes towards GenAI, to dive into what people feel about this nascent technology, where they think it shows potential and what doubts they may harbor. We think, when armed with this data, businesses can better appreciate the opportunities that exist with this game-changing technology.

Let's be clear: there are already enormous opportunities for businesses to delight their customers through the considered application of GenAI. This report clearly shows consumers are genuinely excited about GenAI's potential — they're expecting greater innovation, better customer experiences and more personalized experiences. That means, if you can get your GenAI strategy right, consumers will favor you over competitors.

But what does ‘getting it right’ mean? As the survey data shows, enthusiasm for the technology is tempered by fears about how companies will use GenAI. Consumers are savvy enough to recognize the potential for misuse of the technology — that could include privacy infringements, intellectual property infringements, job losses or deteriorating customer experiences.

At the heart of those fears is a concern that enterprises won’t be transparent about their use of GenAI technology. For some consumers, government regulation is seen as the best means of mitigating against unscrupulous use of GenAI.

But government regulation has inherent problems: too often we’ve seen regulators struggle to keep pace with technology. What chance do they have in a dynamic field, like GenAI?

Rather than rely on regulators, we see an opportunity for enterprises to lead the way.

There’s an incredible opportunity for those firms that embrace GenAI in a responsible manner to capitalize on the excitement around GenAI, to deliver customer-wowing products and services, while assuaging any uncertainties.

Thoughtworks has a long history of working with artificial intelligence technology, we’ve partnered with businesses, public sector organizations, charities and interest groups and have seen first hand GenAI’s potential.

We’ve also long advocated for all organizations to embrace a Responsible Tech mindset — one that aligns technology and organizational behavior with the best interests of consumers. It explores and actively considers the values, unintended consequences and negative impacts of tech, and actively manages, mitigates and reduces risk and harm.



By applying this type of Responsible Tech thinking to your GenAI strategy, your organization can put in guardrails that ensure you don't inadvertently use the tech in ways that upset your customers, and ensures whatever you're doing with GenAI has your customers' interests at its center and that begins with understanding what matters to them. And that really is the key to maximizing the impact you can get from GenAI.

—

Mike Mason

Chief AI Officer
Thoughtworks



Research findings

There are equal amounts of fear and excitement about GenAI

The majority (72%) of our surveyed consumers have some feelings of excitement towards GenAI. Consumers from India are most likely to be excited (95%), while those in Australia are least likely to be (57%). Nonetheless, it is still the majority in all countries that have some level of excitement, showing the enthusiasm and interest GenAI is creating across the globe.

Consumer excitement about GenAI, by country

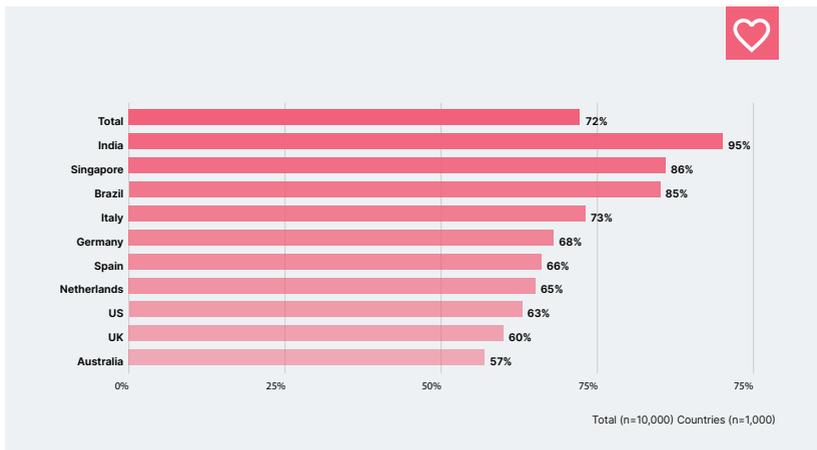


Figure 1: How would you describe your feelings towards GenAI today? Showing a combination of 'Mostly excited' and 'Part excited, part nervous', split by country

However, when we look more closely at the excitement levels globally, it is only three in 10 (30%) that are mostly excited, while 42% are part excited, part nervous. This suggests that for some consumers, the excitement becomes tempered by nagging doubts, suggesting they have mixed feelings towards GenAI.

These contrasting sentiments persist when exploring whether consumers are more or less likely to buy from businesses that are using GenAI. While 42% are more likely to, there are 18% who would feel less inclined to. So, what is influencing these feelings?

Those that are more likely to feel that businesses can use GenAI as a means for greater innovation (59%) and to give them a better customer experience through faster support (51%) and a more personalized experience (50%). For the minority that would be less likely to, lack of human touch (64%) is the most common reason, suggesting that consumers still want an element of human interaction. This is followed by concerns with data privacy (48%) and regulation (45%) which we see becomes a significant fear as we progress through this summary.

The majority of consumers do not trust businesses to deploy GenAI responsibly

It's likely that over time, more and more consumers will interact with businesses that are using GenAI, and may not even know — in most cases, it is used behind the scenes. But this is creating fear among 91% of consumers who would be concerned about their data privacy — particularly around how their data is used, accessed and shared.

Data privacy concerns if businesses use GenAI

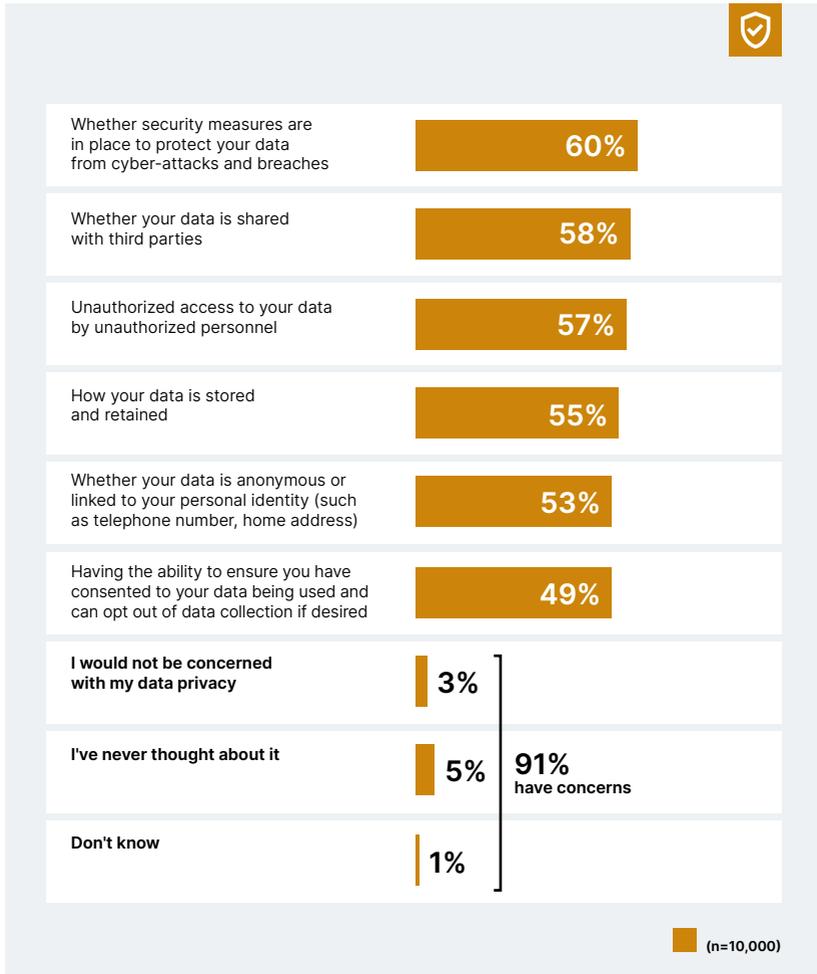


Figure 2: If a business or organization you were looking to buy a product/ service from was using GenAI behind the scenes, what concerns, if any, would you have in relation to your data privacy?

Consumers recognize the need for GenAI regulation and think governments play a vital role in its creation, with 82% believing they can encourage fairness, inclusivity and accountability in the design and deployment of GenAI. Most consumers (90%) also believe government regulations are necessary to hold businesses accountable for how they use it.

But despite the desire for government involvement, our results suggest the onus is on businesses to build trust, as over half (56%) admit they do not trust businesses to follow GenAI regulation. By adopting a responsible mindset to GenAI, businesses have the opportunity to adopt GenAI in a manner that consumers will appreciate. Data protection remains a key catalyst in building this trust, with three quarters stating that, in the realm of GenAI regulation, protecting people is more important than ensuring it does not discourage business innovation or growth.

Consumers don't think regulations will be adhered to

56%

**"I do not trust organizations/
businesses to follow
GenAI regulations"**

Figure 3: To what extent do you agree or disagree with the following statement?
Showing a combination of 'Strongly agree' and 'Somewhat agree' (n=10,000)

Businesses have a social license to operate GenAI

The majority (93%) of consumers have ethical concerns with GenAI. Chief among their concerns is that companies will use their data without consent (71%); 67% of consumers also worry about the risks of misinformation. This emphasizes the need for businesses to offer transparency regarding their utilization of GenAI in order to provide the reassurance that consumers need.

Addressing these concerns is a complex but essential task to ensure responsible development and deployment of GenAI, with businesses having a vital part to play. Those that take proactive steps to address these ethical concerns will build trust with their customers, highlighting their social license to operate and mitigating the need for unnecessary regulatory burden.



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Ethical concerns with GenAI

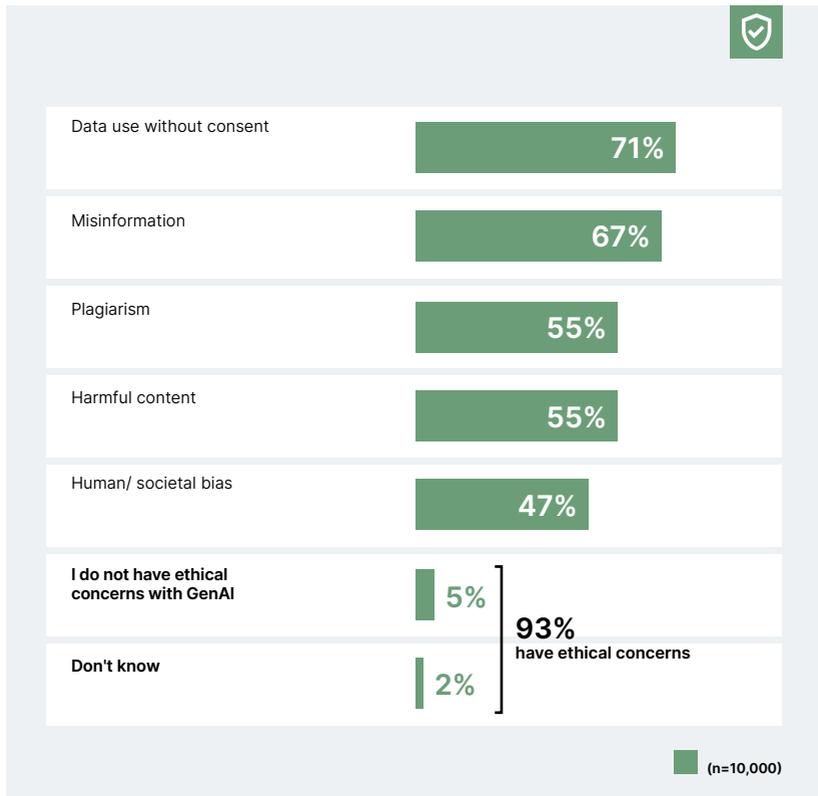


Figure 4: What ethical concerns do you have with GenAI?



We saw in the The State of Responsible Technology, an MIT Technology Review Insights report sponsored by Thoughtworks that senior executives/directors view deployment of Responsible Technology as critical, with it being a concrete business consideration across industries. The results from our consumer research align with 87% of those surveyed expecting businesses to use technology ethically while they innovate.



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So, what happens if a business fails to incorporate responsible and ethical thinking when using GenAI? According to 93% of surveyed consumers, they risk facing detrimental impacts, such as legal and regulatory issues (65%) and reputational damage (65%). Businesses have a unique opportunity to adopt GenAI in a way that consumers will appreciate — in a responsible and transparent manner. Otherwise, they risk severely damaging their brand perception.

Business impacts of using GenAI without incorporating responsible and ethical thinking

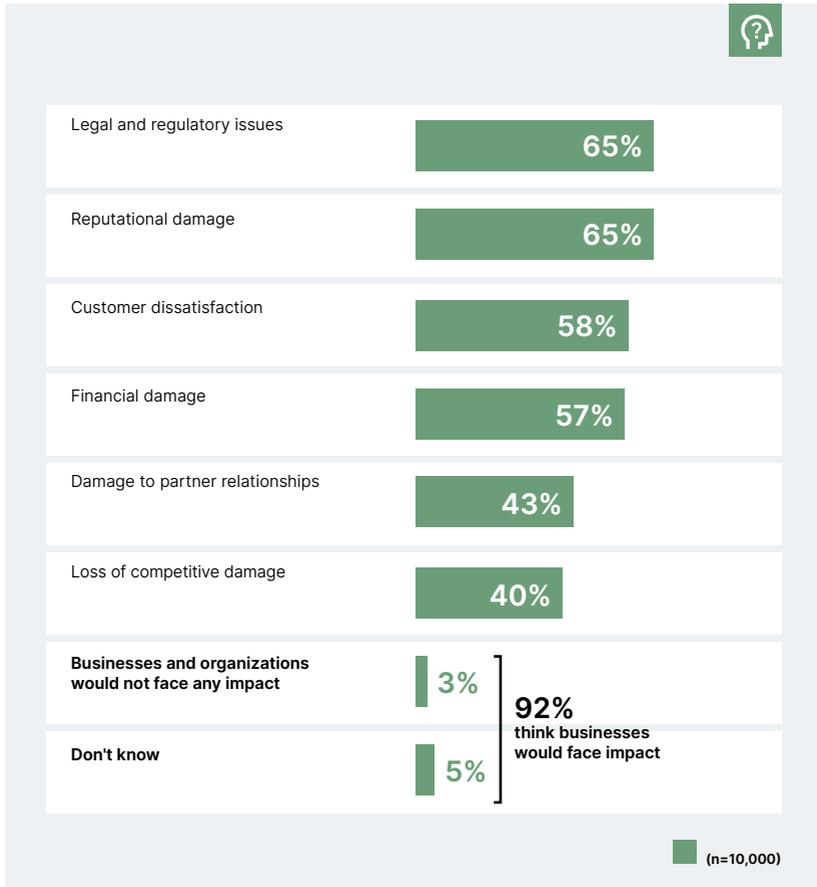


Figure 5: What impact do you believe businesses and organizations would face if it became public that they did not incorporate responsible and ethical thinking when using GenAI?

Conclusion

While there is consumer appetite for GenAI-related products and services, there is concern that businesses would fail to use it responsibly. Regulatory burden and brand damage are detrimental impacts that consumers fear businesses risk facing if they do not incorporate responsible and ethical thinking, emphasizing the social license businesses must operate when using GenAI.

Businesses have an opportunity to leverage these findings to foster trust and educate consumers on GenAI, but doing so in a way that consumers would appreciate is a challenge. Taking proactive steps to address concerns through offering transparency and reassurance would be a great place to start, and Thoughtworks is here to help.

Methodology

Thoughtworks commissioned independent market research agency Vanson Bourne to conduct this research. The global study surveyed 10,000 consumers in August 2023, with 1,000 based in each of Australia, Brazil, Germany, India, Italy, Netherlands, Singapore, Spain, UK and US. All consumers were 18 years old or above and had to have awareness of GenAI to take part.

All interviews were conducted using a rigorous multi-level screening process to ensure that only suitable candidates were given the opportunity to participate.

Thoughtworks is a global technology consultancy that integrates strategy, design and engineering to drive digital innovation. We are over 11,500 people strong across 51 offices in 18 countries. For 30 years, we've delivered extraordinary impact together with our clients by helping them solve complex business problems with technology as the differentiator.

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