

PUBLIC FIRST POLLING FOR GOOGLE - 2024 - EU BUSINESS DECISION MAKERS

Public First surveyed 1,766 business decision makers across the EU. The survey covered:

- Germany
- Belgium
- Finland
- Ireland
- France
- Italy
- Denmark
- Poland
- Spain
- Netherlands
- Sweden
- Norway

The survey was conducted online, between the **30th May and 8th June 2024**. Results are weighted to business size (by employee count) and country for the EU-wide figures.

For any questions on the polling, please contact [**polling@publicfirst.co.uk**](mailto:polling@publicfirst.co.uk)

Google 2024 - EU Business Survey



	Total	Country											
		Germany	Belgium	Finland	Ireland	France	Italy	Denmark	Poland	Spain	Netherlands	Sweden	Norway
Unweighted	1766	249	142	158	121	135	148	150	138	140	149	144	92
Weighted	1766	633	39	27	19	254	273	25	217	160	57	44	18

In general, which of the following do you think are likely to have the biggest positive impact on your business in the next 5 years? Select up to three of the following

BASE: All Respondents

The advances in AI technology	52%	58%	50%	40%	43%	53%	48%	38%	43%	54%	50%	51%	44%
The advances in computer hardware, like improved devices	32%	32%	35%	24%	24%	31%	34%	20%	34%	32%	32%	23%	19%
The green transition and investment in sustainable technology	27%	27%	21%	24%	31%	33%	38%	28%	12%	23%	22%	27%	30%
Improvements to education and workforce skills	27%	30%	20%	24%	22%	18%	24%	27%	31%	37%	17%	27%	24%
The advances in internet technology such as 5G	26%	28%	25%	28%	19%	25%	23%	33%	28%	20%	23%	17%	20%
Improvements to local and national infrastructure	22%	22%	25%	23%	26%	22%	22%	16%	24%	18%	20%	24%	19%
Normalisation of flexible working styles and hybrid working	22%	23%	16%	27%	26%	25%	17%	23%	21%	19%	26%	21%	21%
New trade agreements with non-EU countries	18%	14%	15%	20%	12%	13%	19%	20%	32%	17%	20%	26%	23%
Deepening of the EU-single market, removing barriers between countries in the EU	17%	10%	23%	17%	20%	18%	19%	18%	32%	20%	17%	18%	39%
None of the above are likely to have a positive impact on my business in the next 5 years	6%	8%	8%	8%	4%	6%	7%	6%	1%	3%	7%	7%	5%
Don't Know	1%	1%	1%	2%	4%	0%	1%	2%	0%	1%	1%	1%	3%

There has recently been some discussion in the news about "Artificial Intelligence" or "AI". This is where computers are used to carry out tasks which would normally need a human to do them. How much would you say you know about "AI"?

BASE: All Respondents

I know a lot about AI	38%	43%	36%	29%	27%	43%	41%	39%	28%	32%	23%	32%	33%
I know a moderate amount about AI	40%	36%	47%	46%	42%	36%	42%	41%	46%	43%	55%	37%	36%
I know a little about AI	19%	19%	15%	23%	25%	18%	16%	18%	24%	21%	19%	29%	29%
I know nothing at all about AI	2%	2%	1%	3%	6%	3%	2%	2%	1%	4%	3%	2%	2%
Don't Know	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

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Unweighted	1766	249	142	158	121	135	148	150	138	140	149	144	92
Weighted	1766	633	39	27	19	254	273	25	217	160	57	44	18
In general, how likely do you think it is that your business will explore AI tools more in the next year?													
<i>BASE: All Respondents</i>													
Very likely	54%	58%	48%	45%	45%	52%	55%	50%	44%	60%	43%	47%	45%
Somewhat likely	29%	25%	35%	37%	28%	27%	23%	32%	39%	30%	36%	37%	38%
Neither likely or unlikely	9%	8%	9%	8%	13%	10%	11%	10%	12%	6%	9%	8%	9%
Somewhat unlikely	4%	3%	3%	6%	7%	6%	6%	3%	2%	2%	4%	4%	5%
Not at all likely	4%	6%	5%	5%	4%	5%	4%	4%	2%	2%	6%	4%	2%
Don't Know	1%	0%	0%	0%	2%	0%	0%	1%	1%	0%	1%	1%	1%
Total Likely:	82%	83%	83%	81%	74%	79%	79%	82%	83%	90%	79%	84%	83%
Net:	-82%	-82%	-82%	-81%	-72%	-79%	-79%	-81%	-82%	-89%	-78%	-83%	-82%
Does your business currently use any AI technology to do the following?Please select all that apply.													
<i>BASE: All Respondents</i>													
Data analysis	51%	51%	45%	42%	46%	51%	50%	45%	59%	55%	34%	45%	44%
Information retrieval (e.g. using AI to search the web or internal company data)	47%	46%	49%	29%	34%	49%	47%	39%	56%	50%	37%	37%	38%
Automate repetitive tasks	43%	46%	40%	38%	36%	46%	45%	35%	39%	45%	35%	29%	40%
Automate customer support	41%	41%	39%	26%	32%	32%	48%	37%	47%	45%	30%	45%	25%
Help with drafting/writing documents	38%	44%	50%	35%	42%	30%	32%	30%	38%	38%	37%	32%	40%
Optimise and maximise marketing and sales activity	36%	40%	34%	31%	23%	29%	40%	33%	40%	37%	18%	30%	39%
Automate other internal systems	31%	30%	26%	24%	20%	37%	36%	32%	25%	33%	31%	28%	27%
Not applicable - we don't use AI technology at all	10%	10%	8%	13%	11%	10%	13%	6%	8%	7%	13%	12%	9%
None of the above - but we use AI for other things	3%	3%	3%	6%	3%	4%	1%	3%	2%	2%	4%	1%	2%
Don't Know	1%	1%	1%	2%	4%	0%	1%	5%	1%	0%	2%	2%	0%

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Unweighted	1766	249	142	158	121	135	148	150	138	140	149	144	92
Weighted	1766	633	39	27	19	254	273	25	217	160	57	44	18
In the future, does your business plan to invest in AI tools which take over tasks currently performed by humans?													
<i>BASE: All Respondents</i>													
Yes, in the next year	41%	45%	38%	28%	27%	49%	37%	35%	31%	49%	29%	28%	35%
Yes, in the next two years	28%	30%	25%	26%	23%	25%	25%	24%	32%	26%	26%	26%	35%
Yes, in the next five years	13%	10%	15%	16%	19%	7%	14%	14%	20%	11%	22%	21%	10%
Yes, in the next ten years	4%	2%	4%	8%	6%	5%	5%	7%	4%	4%	5%	5%	7%
Yes, but not in the next ten years	3%	3%	3%	5%	4%	4%	3%	3%	3%	3%	4%	3%	3%
Don't Know	12%	10%	15%	17%	22%	11%	16%	16%	9%	8%	14%	17%	10%
You said you will invest in AI tools which take over tasks currently performed by humans in the next five years. How likely or unlikely is your business to do the following as a result of this?: Reallocate employees freed-up time to other, more valuable tasks													
<i>BASE: Will Invest</i>													
Very likely	34%	31%	36%	29%	44%	40%	43%	41%	28%	32%	28%	36%	38%
Somewhat likely	44%	44%	39%	41%	38%	47%	33%	41%	57%	45%	40%	33%	41%
Neither likely nor unlikely	16%	17%	18%	16%	10%	11%	22%	9%	12%	18%	26%	20%	13%
Somewhat unlikely	4%	7%	4%	12%	1%	2%	2%	5%	1%	3%	3%	7%	4%
Very unlikely	1%	1%	2%	0%	4%	1%	1%	3%	0%	3%	1%	2%	3%
Don't Know	0%	0%	1%	1%	3%	0%	0%	1%	2%	0%	2%	2%	0%
Total Likely:	78%	75%	75%	70%	82%	87%	76%	82%	85%	76%	68%	70%	80%
Total Unlikely:	5%	8%	6%	12%	5%	2%	2%	8%	1%	6%	4%	9%	7%
Net:	73%	66%	69%	58%	77%	84%	74%	74%	84%	70%	64%	61%	73%
You said you will invest in AI tools which take over tasks currently performed by humans in the next five years. How likely or unlikely is your business to do the following as a result of this?: Reduce employee pay													
<i>BASE: Will Invest</i>													
Very likely	10%	15%	17%	13%	9%	8%	4%	38%	2%	5%	11%	14%	16%
Somewhat likely	18%	17%	14%	19%	25%	21%	13%	29%	19%	18%	22%	15%	33%
Neither likely nor unlikely	19%	14%	14%	22%	14%	18%	21%	24%	24%	25%	21%	24%	23%
Somewhat unlikely	23%	27%	22%	27%	27%	18%	20%	4%	30%	17%	23%	23%	13%
Very unlikely	29%	26%	29%	20%	24%	34%	40%	4%	24%	34%	21%	22%	12%
Don't Know	1%	1%	4%	0%	1%	1%	1%	1%	2%	1%	2%	1%	2%
Total Likely:	28%	31%	31%	31%	34%	30%	18%	68%	21%	23%	33%	29%	50%
Total Unlikely:	52%	53%	51%	47%	51%	52%	60%	8%	54%	51%	43%	46%	25%
Net:	-25%	-22%	-20%	-16%	-17%	-23%	-42%	59%	-33%	-28%	-10%	-17%	25%

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Unweighted	1766	249	142	158	121	135	148	150	138	140	149	144	92
Weighted	1766	633	39	27	19	254	273	25	217	160	57	44	18
You said you will invest in AI tools which take over tasks currently performed by humans in the next five years. How likely or unlikely is your business to do the following as a result of this?: Increase employee pay													
<i>BASE: Will invest</i>													
Very likely	19%	21%	29%	19%	7%	17%	13%	37%	19%	15%	19%	22%	38%
Somewhat likely	39%	38%	28%	34%	40%	33%	44%	38%	48%	43%	31%	26%	34%
Neither likely nor unlikely	30%	27%	25%	33%	25%	39%	32%	15%	27%	29%	34%	29%	17%
Somewhat unlikely	7%	8%	11%	9%	18%	7%	9%	8%	3%	8%	7%	12%	8%
Very unlikely	4%	4%	2%	3%	8%	4%	2%	3%	0%	5%	6%	6%	2%
Don't Know	1%	1%	4%	1%	2%	0%	0%	0%	3%	1%	3%	5%	1%
Total Likely:	58%	59%	57%	53%	48%	50%	57%	74%	67%	58%	50%	48%	72%
Total Unlikely:	11%	12%	14%	12%	26%	12%	11%	11%	3%	13%	13%	18%	10%
Net:	47%	47%	43%	41%	22%	38%	46%	64%	64%	45%	37%	31%	62%
You said you will invest in AI tools which take over tasks currently performed by humans in the next five years. How likely or unlikely is your business to do the following as a result of this?: Reduce the number of hours you expect employees to work													
<i>BASE: Will invest</i>													
Very likely	19%	21%	23%	6%	22%	20%	12%	36%	19%	19%	19%	26%	29%
Somewhat likely	34%	33%	33%	40%	24%	29%	37%	36%	39%	41%	31%	31%	36%
Neither likely nor unlikely	24%	22%	24%	26%	25%	28%	27%	18%	26%	20%	27%	19%	14%
Somewhat unlikely	14%	14%	9%	22%	11%	14%	15%	7%	13%	9%	14%	18%	15%
Very unlikely	8%	9%	10%	5%	17%	8%	9%	3%	2%	11%	8%	4%	5%
Don't Know	1%	1%	1%	1%	1%	0%	0%	1%	1%	1%	1%	2%	0%
Total Likely:	54%	53%	56%	46%	46%	49%	49%	72%	58%	60%	50%	56%	66%
Total Unlikely:	22%	24%	19%	27%	28%	23%	24%	10%	14%	20%	22%	22%	21%
Net:	32%	30%	38%	19%	18%	27%	25%	61%	44%	40%	28%	35%	45%
You said you will invest in AI tools which take over tasks currently performed by humans in the next five years. How likely or unlikely is your business to do the following as a result of this?: Reduce the size of your workforce													
<i>BASE: Will invest</i>													
Very likely	12%	12%	21%	14%	23%	14%	9%	45%	5%	11%	19%	24%	26%
Somewhat likely	27%	25%	24%	29%	29%	30%	22%	26%	31%	30%	29%	29%	32%
Neither likely nor unlikely	26%	27%	18%	25%	22%	26%	26%	16%	33%	22%	22%	25%	20%
Somewhat unlikely	21%	20%	17%	21%	14%	18%	30%	7%	21%	18%	16%	15%	8%
Very unlikely	13%	15%	18%	10%	10%	12%	12%	7%	9%	16%	13%	6%	13%
Don't Know	1%	1%	2%	2%	2%	1%	0%	0%	2%	3%	1%	1%	1%
Total Likely:	39%	37%	46%	43%	52%	44%	31%	70%	36%	41%	48%	53%	57%
Total Unlikely:	34%	35%	34%	30%	24%	29%	43%	14%	30%	35%	29%	21%	22%
Net:	5%	2%	11%	13%	28%	15%	-11%	57%	6%	6%	18%	33%	35%

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Weighted	1766	633	39	27	19	254	273	25	217	160	57	44	18
You said you will invest in AI tools which take over tasks currently performed by humans in the next five years. How likely or unlikely is your business to do the following as a result of this?: Reskill existing employees													
<i>BASE: Will invest</i>													
Very likely	35%	38%	39%	32%	29%	37%	36%	42%	25%	34%	31%	24%	38%
Somewhat likely	47%	42%	39%	49%	54%	54%	47%	40%	53%	53%	40%	45%	40%
Neither likely nor unlikely	13%	13%	10%	9%	10%	8%	15%	14%	16%	10%	23%	18%	13%
Somewhat unlikely	3%	5%	4%	9%	4%	0%	1%	4%	2%	1%	4%	9%	3%
Very unlikely	2%	3%	5%	1%	3%	1%	1%	1%	2%	2%	1%	3%	6%
Don't Know	0%	0%	4%	0%	1%	0%	0%	0%	2%	0%	2%	1%	1%
Total Likely:	82%	80%	78%	81%	83%	91%	83%	82%	79%	87%	70%	68%	77%
Total Unlikely:	5%	7%	9%	10%	7%	1%	2%	4%	4%	3%	4%	12%	8%
Net:	77%	73%	69%	71%	76%	91%	81%	77%	75%	84%	66%	56%	69%
You said you will invest in AI tools which take over tasks currently performed by humans in the next five years. How likely or unlikely is your business to do the following as a result of this?: Hire new people to support deployment of AI technology													
<i>BASE: Will invest</i>													
Very likely	31%	30%	33%	24%	36%	39%	31%	45%	20%	35%	18%	36%	35%
Somewhat likely	45%	46%	45%	46%	40%	36%	50%	37%	51%	39%	48%	35%	30%
Neither likely nor unlikely	15%	13%	11%	17%	12%	18%	11%	13%	20%	17%	25%	19%	27%
Somewhat unlikely	6%	8%	6%	10%	10%	4%	4%	3%	5%	5%	3%	5%	5%
Very unlikely	3%	2%	3%	2%	1%	3%	4%	1%	2%	4%	4%	3%	3%
Don't Know	0%	0%	2%	1%	0%	0%	0%	0%	2%	0%	2%	2%	0%
Total Likely:	76%	77%	77%	70%	77%	75%	81%	82%	72%	74%	66%	70%	65%
Total Unlikely:	9%	10%	10%	12%	11%	7%	7%	4%	7%	9%	7%	9%	8%
Net:	67%	66%	68%	58%	65%	68%	74%	78%	65%	65%	58%	62%	57%
You said that you plan to invest in AI tools in the next five years. Looking at the following, how important are these reasons you would plan to invest in AI?: To save costs													
<i>BASE: Will invest</i>													
1 - Not at all important	1%	1%	2%	0%	1%	1%	0%	2%	2%	2%	2%	5%	1%
2	2%	3%	3%	8%	5%	2%	2%	2%	2%	1%	4%	3%	0%
3	16%	15%	15%	17%	9%	16%	25%	11%	11%	5%	25%	16%	11%
4	32%	33%	33%	31%	33%	28%	34%	36%	27%	33%	38%	35%	30%
5 - Very important	48%	47%	47%	42%	52%	52%	38%	46%	57%	59%	30%	41%	58%
Don't Know	1%	1%	0%	1%	1%	0%	0%	3%	1%	0%	1%	1%	0%
You said that you plan to invest in AI tools in the next five years. Looking at the following, how important are these reasons you would plan to invest in AI?: To improve productivity													
<i>BASE: Will invest</i>													
1 - Not at all important	0%	0%	2%	1%	1%	0%	0%	0%	1%	2%	2%	1%	1%
2	2%	3%	0%	0%	0%	2%	1%	2%	2%	0%	3%	0%	0%
3	8%	6%	11%	10%	6%	9%	9%	7%	9%	11%	15%	15%	12%
4	32%	32%	28%	42%	31%	36%	29%	26%	31%	26%	42%	41%	28%
5 - Very important	57%	59%	58%	48%	61%	52%	62%	63%	57%	62%	38%	43%	59%
Don't Know	0%	1%	1%	0%	1%	0%	0%	1%	0%	0%	0%	0%	0%
You said that you plan to invest in AI tools in the next five years. Looking at the following, how important are these reasons you would plan to invest in AI?: To improve employee wellbeing													
<i>BASE: Will invest</i>													
1 - Not at all important	1%	0%	3%	1%	1%	1%	1%	3%	1%	1%	3%	0%	3%
2	3%	4%	4%	6%	3%	4%	2%	3%	1%	2%	7%	2%	4%
3	18%	18%	14%	20%	22%	24%	13%	14%	17%	13%	27%	21%	13%
4	37%	35%	37%	30%	36%	29%	41%	32%	42%	41%	36%	41%	39%
5 - Very important	41%	41%	43%	41%	37%	43%	42%	45%	38%	43%	26%	34%	40%
Don't Know	1%	1%	1%	1%	0%	0%	2%	2%	2%	0%	1%	2%	2%

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Weighted	1766	633	39	27	19	254	273	25	217	160	57	44	18
You said that you plan to invest in AI tools in the next five years. Looking at the following, how important are these reasons you would plan to invest in AI?: To reduce the number of frustrating tasks staff have to do BASE: Will invest													
1 - Not at all important	1%	1%	1%	2%	2%	1%	0%	1%	0%	1%	1%	1%	0%
2	3%	5%	5%	3%	2%	3%	2%	4%	0%	4%	4%	4%	3%
3	18%	21%	13%	15%	5%	14%	14%	13%	20%	16%	26%	20%	19%
4	34%	33%	35%	48%	37%	34%	36%	36%	36%	25%	41%	32%	41%
5 - Very important	43%	40%	45%	31%	54%	48%	46%	46%	42%	53%	28%	42%	37%
Don't Know	1%	1%	1%	1%	0%	0%	1%	0%	2%	1%	1%	2%	0%
You said that you plan to invest in AI tools in the next five years. Looking at the following, how important are these reasons you would plan to invest in AI?: To be more innovative BASE: Will invest													
1 - Not at all important	1%	1%	2%	0%	0%	1%	2%	3%	0%	1%	2%	0%	0%
2	2%	2%	3%	6%	2%	4%	2%	2%	2%	0%	3%	5%	2%
3	10%	7%	16%	21%	15%	11%	11%	10%	9%	9%	24%	13%	13%
4	32%	34%	36%	37%	31%	30%	18%	32%	33%	34%	39%	40%	37%
5 - Very important	54%	54%	41%	36%	53%	54%	66%	51%	55%	55%	32%	40%	48%
Don't Know	1%	1%	2%	0%	0%	0%	0%	2%	0%	1%	1%	2%	1%
You said that you plan to invest in AI tools in the next five years. Looking at the following, how important are these reasons you would plan to invest in AI?: To improve quality BASE: Will invest													
1 - Not at all important	1%	1%	1%	1%	1%	0%	1%	0%	0%	1%	2%	1%	3%
2	2%	2%	2%	7%	2%	2%	1%	3%	1%	1%	2%	5%	1%
3	8%	8%	10%	15%	10%	12%	7%	10%	4%	3%	12%	12%	7%
4	32%	34%	30%	29%	30%	33%	27%	30%	35%	30%	43%	28%	24%
5 - Very important	58%	56%	55%	47%	58%	54%	64%	56%	59%	64%	40%	53%	64%
Don't Know	0%	0%	3%	1%	0%	0%	1%	1%	0%	0%	1%	1%	0%

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	Total	Country											
		Germany	Belgium	Finland	Ireland	France	Italy	Denmark	Poland	Spain	Netherlands	Sweden	Norway
Unweighted	1766	249	142	158	121	135	148	150	138	140	149	144	92
Weighted	1766	633	39	27	19	254	273	25	217	160	57	44	18
You said that you plan to invest in AI tools in the next five years. Looking at the following, how important are these reasons you would plan to invest in AI?: To improve how quickly we can do things													
<i>BASE: Will invest</i>													
1 - Not at all important	0%	0%	2%	0%	0%	0%	1%	1%	0%	1%	2%	2%	0%
2	1%	0%	2%	2%	4%	2%	0%	1%	0%	0%	2%	1%	4%
3	11%	9%	11%	11%	10%	11%	13%	12%	11%	7%	26%	11%	11%
4	34%	34%	32%	28%	37%	36%	34%	30%	30%	31%	34%	48%	35%
5 - Very important	54%	55%	52%	57%	49%	50%	52%	56%	59%	61%	37%	36%	50%
Don't Know	1%	1%	1%	2%	0%	0%	0%	0%	1%	1%	1%	2%	0%
You said that you plan to invest in AI tools in the next five years. Looking at the following, how important are these reasons you would plan to invest in AI?: To make it easier to scale our offering													
<i>BASE: Will invest</i>													
1 - Not at all important	1%	0%	1%	0%	0%	1%	1%	0%	0%	1%	2%	2%	1%
2	3%	3%	3%	4%	1%	3%	3%	4%	2%	0%	5%	6%	3%
3	15%	13%	21%	26%	24%	19%	16%	10%	14%	14%	24%	19%	13%
4	39%	38%	35%	38%	38%	41%	42%	33%	47%	30%	47%	34%	40%
5 - Very important	41%	45%	41%	30%	37%	37%	36%	50%	36%	55%	21%	37%	42%
Don't Know	1%	1%	1%	2%	0%	0%	2%	2%	2%	1%	1%	2%	1%
In the last year, AI tools that are used to generate text, images or video ("Generative AI") have become much more prominent. Examples of text based generative AI tools include Google Gemini, ChatGPT, and Bing Chat, while image tools include Dall-E, Stable Diffusion and Midjourney. How familiar are you with generative AI tools?													
<i>BASE: All Respondents</i>													
Very familiar	29%	34%	23%	20%	19%	27%	34%	33%	20%	25%	21%	27%	26%
Somewhat familiar	43%	43%	47%	43%	44%	38%	36%	32%	54%	45%	45%	40%	42%
Neither familiar or unfamiliar	14%	10%	15%	17%	12%	19%	13%	22%	18%	10%	16%	16%	20%
Somewhat unfamiliar	9%	8%	9%	11%	13%	8%	11%	5%	7%	13%	9%	8%	6%
Very unfamiliar	5%	4%	5%	8%	12%	6%	6%	7%	1%	6%	8%	7%	6%
Don't Know	1%	0%	1%	1%	1%	2%	0%	1%	0%	0%	0%	2%	0%
Generative AI refers specifically to AI tools that generate new, realistic content (e.g. images, text, or video). This includes tools such as Chat GPT or Google Gemini. How likely do you think it is that generative AI will significantly improve the productivity of your business in the next few years?													
<i>BASE: All Respondents</i>													
Very likely	36%	40%	31%	21%	26%	33%	37%	36%	33%	41%	25%	26%	27%
Somewhat likely	39%	37%	40%	35%	37%	38%	39%	33%	42%	37%	41%	38%	49%
Neither likely or unlikely	12%	9%	15%	20%	15%	13%	8%	14%	18%	11%	22%	20%	14%
Somewhat unlikely	7%	7%	7%	11%	10%	4%	8%	7%	4%	7%	7%	11%	5%
Very unlikely	6%	5%	6%	11%	9%	10%	5%	6%	2%	4%	4%	4%	5%
Don't Know	1%	1%	1%	2%	3%	1%	2%	3%	0%	0%	2%	2%	1%
Total Likely:	75%	77%	71%	56%	63%	71%	77%	69%	76%	78%	66%	64%	76%
Total Unlikely:	12%	13%	13%	19%	15%	14%	14%	13%	6%	11%	11%	15%	9%
Net:	62%	64%	58%	33%	44%	56%	63%	56%	69%	67%	55%	49%	66%
Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: Generative AI to come up with new ideas or suggestions													
<i>BASE: All Respondents</i>													
We have regularly used AI for this in my business	29%	31%	35%	25%	27%	22%	38%	30%	26%	25%	15%	23%	29%
We have occasionally used AI for this in my business	32%	30%	27%	29%	26%	36%	24%	32%	41%	37%	32%	28%	37%
We have used AI for this in my business, but rarely	14%	13%	17%	16%	14%	16%	11%	13%	14%	19%	19%	19%	14%
We have not used AI for this in my business	23%	23%	17%	29%	31%	23%	25%	21%	19%	18%	30%	28%	18%
Don't Know	2%	2%	4%	1%	3%	3%	2%	5%	0%	0%	3%	1%	2%

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	Total	Country											
		Germany	Belgium	Finland	Ireland	France	Italy	Denmark	Poland	Spain	Netherlands	Sweden	Norway
Unweighted	1766	249	142	158	121	135	148	150	138	140	149	144	92
Weighted	1766	633	39	27	19	254	273	25	217	160	57	44	18
Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: To help with internet research													
<i>BASE: All Respondents</i>													
We have regularly used AI for this in my business	36%	35%	34%	27%	34%	30%	43%	33%	47%	36%	25%	30%	34%
We have occasionally used AI for this in my business	31%	30%	36%	33%	24%	33%	26%	34%	34%	34%	28%	27%	27%
We have used AI for this in my business, but rarely	13%	13%	12%	18%	15%	13%	9%	10%	10%	17%	19%	15%	16%
We have not used AI for this in my business	18%	20%	16%	18%	23%	21%	21%	19%	9%	10%	24%	23%	22%
Don't Know	2%	2%	1%	3%	4%	3%	1%	4%	0%	3%	3%	5%	1%
Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: To draft documents or reports													
<i>BASE: All Respondents</i>													
We have regularly used AI for this in my business	33%	35%	38%	24%	28%	34%	33%	26%	34%	34%	18%	30%	23%
We have occasionally used AI for this in my business	31%	35%	26%	33%	32%	27%	26%	33%	33%	29%	34%	21%	34%
We have used AI for this in my business, but rarely	14%	10%	15%	17%	13%	15%	18%	22%	17%	17%	17%	16%	18%
We have not used AI for this in my business	20%	18%	19%	24%	23%	20%	23%	15%	16%	21%	25%	31%	21%
Don't Know	2%	2%	3%	1%	3%	4%	1%	4%	0%	0%	5%	3%	4%
Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: To summarise long documents or information													
<i>BASE: All Respondents</i>													
We have regularly used AI for this in my business	33%	35%	31%	27%	27%	29%	32%	32%	37%	30%	24%	29%	25%
We have occasionally used AI for this in my business	31%	31%	32%	27%	31%	34%	28%	29%	32%	33%	34%	26%	42%
We have used AI for this in my business, but rarely	14%	14%	13%	20%	9%	14%	13%	14%	16%	16%	17%	16%	13%
We have not used AI for this in my business	20%	19%	21%	25%	28%	20%	25%	21%	15%	20%	22%	27%	19%
Don't Know	2%	1%	3%	2%	3%	3%	2%	4%	0%	0%	2%	2%	2%
Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: Generative AI to produce original images or art for your business to use													
<i>BASE: All Respondents</i>													
We have regularly used AI for this in my business	27%	25%	28%	17%	22%	26%	35%	28%	27%	26%	16%	22%	28%
We have occasionally used AI for this in my business	30%	32%	23%	29%	31%	28%	26%	31%	33%	30%	27%	22%	28%
We have used AI for this in my business, but rarely	15%	15%	22%	17%	9%	11%	13%	14%	15%	20%	18%	21%	25%
We have not used AI for this in my business	27%	26%	23%	36%	33%	33%	24%	23%	23%	24%	36%	33%	18%
Don't Know	2%	2%	3%	2%	5%	2%	1%	4%	2%	0%	3%	2%	1%
Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: To analyse data													
<i>BASE: All Respondents</i>													
We have regularly used AI for this in my business	37%	36%	33%	24%	26%	34%	44%	28%	45%	40%	23%	30%	20%
We have occasionally used AI for this in my business	28%	29%	31%	30%	28%	29%	23%	36%	27%	22%	32%	29%	41%
We have used AI for this in my business, but rarely	13%	13%	16%	17%	15%	13%	9%	14%	12%	19%	14%	12%	18%
We have not used AI for this in my business	20%	20%	15%	24%	26%	21%	23%	19%	16%	18%	28%	27%	20%
Don't Know	2%	2%	5%	4%	4%	2%	1%	3%	0%	0%	4%	2%	0%
Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: To train more junior members of staff													
<i>BASE: All Respondents</i>													
We have regularly used AI for this in my business	19%	22%	19%	9%	26%	19%	18%	22%	17%	18%	12%	20%	21%
We have occasionally used AI for this in my business	26%	23%	26%	22%	15%	26%	30%	31%	32%	31%	23%	24%	35%
We have used AI for this in my business, but rarely	18%	17%	19%	19%	13%	19%	16%	17%	25%	10%	23%	19%	12%
We have not used AI for this in my business	34%	35%	33%	48%	41%	31%	36%	25%	25%	40%	38%	33%	28%
Don't Know	3%	3%	3%	2%	4%	5%	0%	4%	2%	0%	5%	4%	4%

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	Total	Country											
		Germany	Belgium	Finland	Ireland	France	Italy	Denmark	Poland	Spain	Netherlands	Sweden	Norway
Unweighted	1766	249	142	158	121	135	148	150	138	140	149	144	92
Weighted	1766	633	39	27	19	254	273	25	217	160	57	44	18
Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: To automate social media posts and/or ad campaigns													
<i>BASE: All Respondents</i>													
We have regularly used AI for this in my business	25%	24%	29%	18%	21%	25%	28%	27%	28%	21%	17%	22%	18%
We have occasionally used AI for this in my business	31%	30%	30%	24%	27%	32%	26%	34%	35%	39%	34%	23%	39%
We have used AI for this in my business, but rarely	15%	15%	14%	19%	12%	16%	13%	15%	13%	17%	18%	12%	12%
We have not used AI for this in my business	26%	27%	22%	36%	34%	26%	28%	20%	22%	25%	28%	31%	30%
Don't Know	3%	3%	5%	3%	6%	4%	2%	7%	1%	1%	3%	5%	1%
Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: To improve cyber security/ threat detection													
<i>BASE: All Respondents</i>													
We have regularly used AI for this in my business	29%	31%	29%	21%	19%	24%	35%	26%	32%	26%	17%	23%	27%
We have occasionally used AI for this in my business	27%	24%	25%	20%	25%	31%	27%	27%	31%	31%	28%	26%	25%
We have used AI for this in my business, but rarely	15%	15%	17%	17%	12%	18%	10%	19%	15%	17%	22%	16%	19%
We have not used AI for this in my business	27%	28%	22%	38%	36%	25%	27%	25%	20%	25%	28%	32%	27%
Don't Know	2%	3%	6%	4%	8%	2%	1%	4%	2%	0%	5%	4%	1%
Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: Improve or streamline operational processes													
<i>BASE: All Respondents</i>													
We have regularly used AI for this in my business	32%	31%	29%	18%	19%	34%	39%	27%	33%	35%	15%	21%	20%
We have occasionally used AI for this in my business	28%	26%	27%	38%	29%	28%	26%	32%	34%	29%	31%	27%	34%
We have used AI for this in my business, but rarely	16%	18%	20%	14%	18%	10%	15%	19%	17%	19%	21%	23%	19%
We have not used AI for this in my business	22%	24%	21%	28%	28%	24%	19%	19%	15%	17%	30%	28%	24%
Don't Know	2%	2%	3%	2%	5%	4%	2%	4%	1%	0%	3%	1%	3%
Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: To recognise images or reverse image search													
<i>BASE: All Respondents</i>													
We have regularly used AI for this in my business	26%	26%	23%	17%	17%	24%	30%	27%	35%	22%	17%	24%	22%
We have occasionally used AI for this in my business	31%	33%	27%	30%	29%	32%	26%	28%	33%	35%	35%	18%	34%
We have used AI for this in my business, but rarely	16%	14%	22%	22%	14%	17%	12%	17%	15%	19%	22%	24%	18%
We have not used AI for this in my business	25%	25%	23%	29%	33%	25%	30%	22%	17%	23%	22%	31%	22%
Don't Know	2%	2%	5%	0%	6%	3%	2%	5%	1%	1%	3%	4%	4%

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	Total	Country											
		Germany	Belgium	Finland	Ireland	France	Italy	Denmark	Poland	Spain	Netherlands	Sweden	Norway
Unweighted	1766	249	142	158	121	135	148	150	138	140	149	144	92
Weighted	1766	633	39	27	19	254	273	25	217	160	57	44	18
Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: To help with programming or coding													
<i>BASE: All Respondents</i>													
We have regularly used AI for this in my business	28%	26%	24%	22%	25%	25%	32%	30%	37%	28%	19%	20%	25%
We have occasionally used AI for this in my business	28%	29%	29%	26%	20%	28%	29%	24%	23%	25%	29%	28%	33%
We have used AI for this in my business, but rarely	16%	17%	20%	20%	11%	19%	10%	16%	12%	22%	18%	20%	17%
We have not used AI for this in my business	26%	26%	24%	28%	36%	26%	29%	25%	27%	23%	29%	30%	22%
Don't Know	2%	2%	3%	4%	8%	2%	1%	5%	2%	1%	5%	2%	3%
Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: To translate documents or information													
<i>BASE: All Respondents</i>													
We have regularly used AI for this in my business	32%	33%	40%	23%	26%	27%	36%	26%	36%	30%	20%	26%	28%
We have occasionally used AI for this in my business	34%	36%	26%	35%	32%	39%	29%	35%	41%	32%	31%	24%	29%
We have used AI for this in my business, but rarely	14%	12%	17%	13%	11%	19%	13%	20%	10%	14%	23%	18%	22%
We have not used AI for this in my business	18%	18%	13%	27%	26%	14%	22%	15%	12%	24%	22%	28%	19%
Don't Know	2%	2%	3%	2%	5%	2%	0%	4%	0%	1%	4%	4%	1%
Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: To transcribe speech or recordings													
<i>BASE: All Respondents</i>													
We have regularly used AI for this in my business	25%	26%	32%	19%	26%	21%	25%	30%	27%	25%	17%	23%	23%
We have occasionally used AI for this in my business	30%	29%	23%	18%	21%	33%	31%	31%	33%	32%	23%	22%	33%
We have used AI for this in my business, but rarely	18%	19%	14%	15%	18%	17%	16%	13%	16%	17%	20%	19%	21%
We have not used AI for this in my business	25%	23%	28%	45%	30%	27%	25%	22%	23%	25%	35%	29%	21%
Don't Know	2%	3%	3%	3%	6%	2%	2%	3%	2%	0%	6%	6%	1%
Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: To retrieve or analyse information from your company's existing data													
<i>BASE: All Respondents</i>													
We have regularly used AI for this in my business	32%	34%	28%	21%	23%	31%	36%	30%	38%	26%	16%	26%	30%
We have occasionally used AI for this in my business	29%	29%	29%	21%	27%	33%	24%	32%	32%	29%	33%	28%	32%
We have used AI for this in my business, but rarely	14%	13%	21%	22%	11%	10%	15%	14%	10%	24%	17%	14%	17%
We have not used AI for this in my business	22%	22%	20%	31%	33%	22%	24%	20%	18%	20%	29%	29%	21%
Don't Know	2%	2%	3%	4%	5%	4%	1%	5%	1%	0%	4%	3%	0%

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	Total	Country											
		Germany	Belgium	Finland	Ireland	France	Italy	Denmark	Poland	Spain	Netherlands	Sweden	Norway
Unweighted	1766	249	142	158	121	135	148	150	138	140	149	144	92
Weighted	1766	633	39	27	19	254	273	25	217	160	57	44	18
Which, if any, of the following best explains your experience with generative AI so far?													
<i>BASE: All Respondents</i>													
Generative AI tools are already creating a lot of value for my business	35%	37%	32%	19%	29%	31%	42%	34%	41%	31%	22%	28%	25%
Generative AI tools might create a lot of value for my business in the medium term, but at the moment we have only found limited use cases	42%	38%	47%	47%	31%	45%	36%	45%	41%	54%	52%	45%	54%
Generative AI tools do not seem likely to create much value for my business, even in the medium term	10%	11%	12%	19%	17%	9%	8%	8%	9%	8%	13%	11%	9%
Generative AI tools will never create much value for my business	6%	7%	5%	6%	10%	8%	7%	6%	4%	3%	7%	8%	5%
None of the above	5%	5%	2%	5%	8%	4%	6%	4%	4%	3%	4%	4%	3%
Don't Know	2%	2%	1%	3%	5%	3%	1%	2%	0%	1%	2%	4%	5%
You said that you have already used AI in some way in your business.Would you say your business using AI has had any of the following impacts?: Improved the productivity of our staff													
<i>BASE: Has used AI</i>													
Has had this impact	48%	53%	42%	43%	41%	44%	52%	47%	40%	49%	30%	44%	52%
Too soon to tell either way	38%	35%	48%	41%	43%	43%	37%	34%	38%	39%	53%	38%	29%
Has not had this impact	12%	10%	8%	14%	14%	12%	10%	19%	20%	11%	16%	14%	17%
Don't Know	2%	2%	2%	2%	2%	1%	1%	0%	2%	0%	1%	3%	3%
You said that you have already used AI in some way in your business.Would you say your business using AI has had any of the following impacts?: Improved the productivity of the business as a whole													
<i>BASE: Has used AI</i>													
Has had this impact	50%	57%	45%	30%	42%	37%	55%	43%	49%	50%	34%	45%	56%
Too soon to tell either way	39%	35%	45%	49%	38%	51%	35%	35%	39%	38%	50%	44%	31%
Has not had this impact	10%	8%	9%	19%	19%	10%	9%	20%	11%	12%	13%	8%	9%
Don't Know	1%	1%	1%	1%	1%	3%	2%	2%	1%	0%	3%	2%	3%
You said that you have already used AI in some way in your business.Would you say your business using AI has had any of the following impacts?: Freed up time for members of staff to focus on higher value tasks													
<i>BASE: Has used AI</i>													
Has had this impact	47%	49%	45%	48%	37%	52%	41%	44%	47%	49%	23%	48%	48%
Too soon to tell either way	38%	38%	43%	38%	40%	35%	39%	39%	37%	39%	59%	34%	40%
Has not had this impact	13%	12%	11%	13%	21%	10%	19%	16%	13%	12%	12%	15%	8%
Don't Know	2%	1%	2%	2%	2%	3%	2%	1%	3%	1%	6%	3%	4%
You said that you have already used AI in some way in your business.Would you say your business using AI has had any of the following impacts?: Generated new ideas which have been implemented													
<i>BASE: Has used AI</i>													
Has had this impact	47%	55%	39%	40%	33%	39%	47%	41%	42%	48%	25%	40%	52%
Too soon to tell either way	37%	32%	40%	42%	35%	37%	39%	39%	42%	38%	52%	39%	32%
Has not had this impact	14%	11%	16%	16%	28%	22%	14%	16%	14%	12%	18%	18%	15%
Don't Know	2%	2%	5%	1%	5%	2%	0%	4%	1%	2%	4%	3%	1%
You said that you have already used AI in some way in your business.Would you say your business using AI has had any of the following impacts?: AI has become an essential part of a product or service we offer													
<i>BASE: Has used AI</i>													
Has had this impact	40%	45%	33%	26%	39%	40%	38%	38%	36%	36%	22%	38%	46%
Too soon to tell either way	42%	39%	47%	46%	32%	41%	41%	42%	47%	45%	48%	45%	39%
Has not had this impact	17%	15%	17%	25%	25%	19%	20%	17%	15%	15%	26%	15%	12%
Don't Know	1%	1%	3%	2%	5%	0%	0%	2%	3%	4%	3%	2%	2%

Google 2024 - EU Business Survey



	Total	Country											
		Germany	Belgium	Finland	Ireland	France	Italy	Denmark	Poland	Spain	Netherlands	Sweden	Norway
Unweighted	1766	249	142	158	121	135	148	150	138	140	149	144	92
Weighted	1766	633	39	27	19	254	273	25	217	160	57	44	18
Thinking ahead to the next 5 years, how likely or unlikely do you expect it is that using AI would have the following impacts for your business?: Improve the productivity of our staff													
<i>BASE: All Respondents</i>													
AI will definitely do this for my business	35%	37%	33%	23%	30%	30%	41%	38%	33%	39%	22%	32%	33%
AI is likely to do this for my business	38%	38%	38%	42%	33%	40%	30%	37%	45%	41%	41%	42%	44%
AI is unlikely to do this for my business	14%	12%	18%	21%	13%	15%	18%	15%	11%	10%	21%	14%	13%
AI will definitely not do this for my business	9%	9%	8%	12%	13%	14%	9%	7%	7%	9%	10%	9%	7%
Don't Know	3%	3%	3%	2%	11%	2%	2%	3%	5%	1%	5%	5%	3%
Thinking ahead to the next 5 years, how likely or unlikely do you expect it is that using AI would have the following impacts for your business?: Improve the productivity of my business as a whole													
<i>BASE: All Respondents</i>													
AI will definitely do this for my business	40%	43%	37%	23%	29%	39%	48%	36%	33%	40%	26%	36%	38%
AI is likely to do this for my business	37%	34%	36%	49%	43%	34%	29%	32%	45%	46%	44%	43%	43%
AI is unlikely to do this for my business	12%	11%	15%	16%	9%	14%	14%	22%	10%	7%	15%	10%	11%
AI will definitely not do this for my business	8%	8%	5%	9%	8%	11%	6%	7%	7%	6%	11%	8%	5%
Don't Know	3%	3%	7%	2%	10%	2%	4%	4%	5%	1%	4%	4%	2%
Thinking ahead to the next 5 years, how likely or unlikely do you expect it is that using AI would have the following impacts for your business?: Free up time for staff at my business to focus on higher value tasks													
<i>BASE: All Respondents</i>													
AI will definitely do this for my business	35%	36%	34%	26%	32%	36%	35%	34%	34%	41%	25%	34%	28%
AI is likely to do this for my business	39%	37%	35%	47%	38%	42%	35%	38%	44%	43%	39%	38%	53%
AI is unlikely to do this for my business	13%	14%	19%	12%	12%	10%	18%	17%	11%	8%	21%	15%	12%
AI will definitely not do this for my business	9%	10%	8%	13%	8%	11%	10%	9%	4%	8%	9%	10%	5%
Don't Know	3%	3%	4%	2%	10%	1%	1%	2%	6%	1%	6%	3%	2%

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	Total	Country											
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Unweighted	1766	249	142	158	121	135	148	150	138	140	149	144	92
Weighted	1766	633	39	27	19	254	273	25	217	160	57	44	18
Thinking ahead to the next 5 years, how likely or unlikely do you expect it is that using AI would have the following impacts for your business?: Become an essential part of a product or service that we offer													
<i>BASE: All Respondents</i>													
AI will definitely do this for my business	33%	41%	27%	24%	24%	29%	35%	31%	23%	30%	15%	23%	31%
AI is likely to do this for my business	37%	28%	43%	39%	37%	40%	37%	36%	48%	42%	45%	43%	46%
AI is unlikely to do this for my business	16%	16%	16%	23%	20%	12%	15%	21%	17%	17%	22%	22%	14%
AI will definitely not do this for my business	11%	12%	9%	12%	11%	17%	9%	9%	8%	8%	13%	7%	7%
Don't Know	4%	3%	5%	2%	8%	2%	4%	4%	5%	3%	6%	5%	3%
Thinking ahead to the next 5 years, how likely or unlikely do you expect it is that using AI would have the following impacts for your business?: Reduce the need for human employees													
<i>BASE: All Respondents</i>													
AI will definitely do this for my business	24%	28%	22%	17%	16%	24%	20%	36%	18%	23%	14%	20%	21%
AI is likely to do this for my business	34%	33%	31%	30%	31%	33%	32%	31%	39%	35%	37%	38%	36%
AI is unlikely to do this for my business	24%	22%	22%	30%	27%	20%	27%	21%	24%	23%	30%	28%	27%
AI will definitely not do this for my business	15%	13%	19%	22%	15%	20%	19%	11%	11%	15%	13%	10%	11%
Don't Know	4%	4%	5%	1%	11%	2%	3%	2%	8%	3%	6%	4%	4%
Thinking ahead to the next 5 years, how likely or unlikely do you expect it is that using AI would have the following impacts for your business?: Make our company more profitable													
<i>BASE: All Respondents</i>													
AI will definitely do this for my business	34%	36%	25%	32%	19%	25%	46%	31%	31%	35%	18%	27%	39%
AI is likely to do this for my business	41%	38%	46%	37%	41%	49%	33%	37%	47%	45%	41%	44%	43%
AI is unlikely to do this for my business	13%	14%	16%	18%	15%	13%	9%	20%	10%	13%	24%	17%	6%
AI will definitely not do this for my business	8%	9%	9%	10%	10%	11%	9%	9%	6%	5%	11%	6%	6%
Don't Know	4%	3%	5%	2%	15%	2%	3%	4%	6%	3%	7%	6%	7%
In the future, does your business plan to invest more in generative AI tools?													
<i>BASE: All Respondents</i>													
Yes, in the next year	39%	47%	33%	24%	28%	40%	34%	34%	28%	39%	20%	29%	35%
Yes, in the next two years	28%	25%	28%	24%	20%	31%	30%	20%	32%	32%	31%	28%	32%
Yes, in the next five years	14%	11%	18%	21%	28%	8%	14%	18%	19%	18%	28%	18%	15%
Yes, in the next ten years	5%	5%	6%	6%	3%	5%	8%	10%	5%	3%	6%	7%	3%
Yes, but not in the next ten years	3%	3%	3%	6%	3%	4%	3%	4%	5%	1%	4%	4%	3%
Don't know	11%	10%	11%	19%	19%	12%	11%	14%	11%	7%	11%	15%	11%

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In general, how often would you say you personally ask a Generative AI language model (such as Google Gemini, ChatGPT) a question related to your work?													
<i>BASE: All Respondents</i>													
Never	10%	11%	8%	17%	16%	13%	10%	10%	5%	7%	16%	14%	10%
Less than once a month, but still on occasion	10%	8%	10%	16%	15%	6%	15%	14%	9%	17%	11%	10%	9%
Around once a month	9%	8%	13%	9%	9%	12%	7%	9%	11%	8%	19%	11%	8%
A few times a month	14%	13%	12%	9%	16%	16%	14%	9%	22%	12%	11%	11%	15%
Around once a week	6%	6%	9%	5%	3%	4%	4%	8%	8%	9%	14%	7%	13%
A few times a week	16%	14%	15%	20%	11%	19%	19%	11%	15%	18%	11%	17%	14%
Around once a day	6%	9%	10%	7%	6%	4%	2%	7%	4%	8%	5%	7%	7%
2 - 5 times a day	14%	17%	13%	11%	11%	12%	15%	7%	12%	12%	6%	11%	14%
6 - 10 times a day	7%	9%	5%	3%	5%	8%	7%	14%	7%	4%	4%	6%	4%
Over 10 times a day	5%	6%	4%	4%	3%	1%	5%	8%	5%	5%	0%	5%	4%
Don't Know	2%	1%	1%	1%	4%	4%	0%	5%	2%	1%	3%	1%	1%
To what extent do you agree or disagree with the following?: Keeping up with developments in AI will be important for my business to remain competitive													
<i>BASE: All Respondents</i>													
Strongly agree	43%	48%	38%	30%	35%	43%	44%	38%	40%	48%	22%	33%	34%
Somewhat agree	29%	25%	31%	42%	31%	28%	28%	30%	34%	30%	42%	39%	40%
Neither agree nor disagree	15%	14%	16%	14%	19%	15%	15%	19%	17%	10%	21%	13%	15%
Somewhat disagree	5%	4%	9%	6%	7%	5%	6%	7%	5%	6%	5%	6%	4%
Strongly disagree	6%	8%	4%	6%	6%	8%	7%	4%	2%	5%	8%	7%	5%
Don't Know	1%	1%	2%	1%	3%	1%	1%	2%	2%	0%	1%	2%	1%
Total Agree:	73%	73%	69%	73%	66%	71%	72%	69%	74%	79%	64%	72%	74%
Total Disagree:	12%	12%	12%	12%	13%	13%	12%	11%	7%	11%	13%	13%	9%
Net:	61%	61%	57%	61%	54%	57%	60%	58%	67%	67%	51%	59%	64%
To what extent do you agree or disagree with the following?: Having access to the latest AI technology is important for my business to remain competitive													
<i>BASE: All Respondents</i>													
Strongly agree	40%	43%	40%	24%	26%	34%	44%	40%	40%	42%	25%	29%	34%
Somewhat agree	32%	30%	26%	41%	39%	37%	24%	25%	34%	34%	35%	41%	36%
Neither agree nor disagree	14%	12%	22%	18%	16%	13%	18%	16%	13%	14%	23%	15%	14%
Somewhat disagree	7%	7%	7%	9%	9%	6%	7%	11%	8%	4%	7%	6%	7%
Strongly disagree	6%	7%	3%	6%	7%	9%	6%	6%	3%	3%	8%	8%	7%
Don't Know	1%	1%	2%	1%	3%	0%	1%	2%	1%	2%	2%	0%	1%
Total Agree:	71%	73%	66%	65%	65%	71%	68%	65%	74%	77%	60%	70%	70%
Total Disagree:	13%	14%	10%	15%	16%	15%	13%	16%	12%	8%	15%	14%	15%
Net:	58%	60%	56%	50%	50%	55%	55%	48%	62%	69%	44%	56%	55%
Which of the following would you say is a more important reason why your business does not use more AI tools?													
<i>BASE: All Respondents</i>													
We do not know of any other compelling use cases where we want to invest in AI tools	39%	38%	40%	22%	43%	46%	40%	35%	42%	25%	39%	40%	35%
While they might be useful, we do not have the time, money or skills to implement new AI tools at present	51%	52%	51%	62%	44%	43%	49%	55%	46%	63%	54%	50%	64%
Don't Know	11%	10%	10%	16%	13%	10%	10%	10%	12%	13%	7%	10%	1%

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Weighted	1766	633	39	27	19	254	273	25	217	160	57	44	18
Which of the following, if any, are barriers to your business making more use of AI?:													
Cost of AI tools													
<i>BASE: All Respondents</i>													
This is a significant barrier	13%	15%	18%	15%	20%	10%	10%	7%	11%	14%	15%	14%	26%
This is a barrier	27%	26%	24%	26%	38%	26%	23%	26%	32%	36%	32%	24%	32%
This is not much of a barrier	35%	37%	31%	33%	25%	32%	34%	42%	40%	32%	28%	28%	24%
This is not a barrier at all	21%	18%	23%	22%	13%	30%	31%	20%	13%	16%	13%	24%	11%
Don't Know	3%	3%	4%	5%	5%	3%	2%	6%	4%	3%	5%	10%	6%
Which of the following, if any, are barriers to your business making more use of AI?:													
Concerns about the security of AI tools													
<i>BASE: All Respondents</i>													
This is a significant barrier	16%	21%	12%	13%	20%	13%	11%	24%	11%	13%	15%	18%	22%
This is a barrier	29%	27%	31%	31%	37%	28%	26%	25%	31%	36%	35%	29%	42%
This is not much of a barrier	33%	29%	31%	29%	24%	32%	41%	34%	39%	33%	35%	34%	21%
This is not a barrier at all	19%	21%	23%	22%	14%	22%	19%	13%	16%	15%	12%	13%	12%
Don't Know	3%	2%	2%	5%	5%	5%	3%	4%	2%	3%	3%	6%	3%
Which of the following, if any, are barriers to your business making more use of AI?:													
Concerns about the quality of AI outputs													
<i>BASE: All Respondents</i>													
This is a significant barrier	13%	15%	15%	17%	17%	11%	15%	21%	7%	9%	14%	13%	24%
This is a barrier	30%	27%	31%	36%	42%	33%	24%	22%	34%	29%	39%	38%	39%
This is not much of a barrier	33%	32%	27%	29%	21%	28%	37%	34%	38%	40%	27%	30%	28%
This is not a barrier at all	21%	23%	23%	15%	14%	26%	21%	19%	20%	19%	16%	15%	5%
Don't Know	3%	3%	4%	3%	6%	2%	3%	5%	1%	3%	3%	4%	4%
Which of the following, if any, are barriers to your business making more use of AI?:													
Concerns about the reliability of AI tools													
<i>BASE: All Respondents</i>													
This is a significant barrier	14%	17%	18%	14%	20%	11%	14%	16%	6%	12%	19%	14%	37%
This is a barrier	29%	27%	28%	42%	30%	27%	23%	33%	36%	34%	34%	43%	28%
This is not much of a barrier	32%	30%	31%	26%	32%	29%	33%	33%	39%	32%	31%	24%	26%
This is not a barrier at all	22%	23%	18%	15%	14%	28%	26%	14%	15%	19%	13%	13%	6%
Don't Know	4%	3%	4%	2%	4%	4%	5%	4%	4%	2%	3%	6%	4%
Which of the following, if any, are barriers to your business making more use of AI?:													
AI is not transparent enough in how it works													
<i>BASE: All Respondents</i>													
This is a significant barrier	13%	16%	14%	7%	14%	10%	9%	10%	10%	13%	12%	15%	20%
This is a barrier	27%	26%	25%	31%	40%	31%	24%	34%	27%	31%	33%	26%	33%
This is not much of a barrier	35%	34%	36%	42%	25%	34%	36%	38%	42%	30%	41%	34%	28%
This is not a barrier at all	20%	20%	17%	15%	14%	19%	27%	12%	19%	21%	10%	18%	13%
Don't Know	5%	5%	7%	5%	7%	6%	4%	5%	1%	5%	4%	8%	5%

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Weighted	1766	633	39	27	19	254	273	25	217	160	57	44	18
Which of the following, if any, are barriers to your business making more use of AI?:													
Concerns about legal requirements and liabilities of using AI													
<i>BASE: All Respondents</i>													
This is a significant barrier	15%	22%	19%	11%	20%	11%	13%	17%	10%	11%	13%	16%	13%
This is a barrier	32%	32%	29%	29%	36%	27%	29%	31%	34%	39%	41%	33%	40%
This is not much of a barrier	33%	32%	32%	33%	26%	38%	31%	35%	41%	29%	27%	32%	27%
This is not a barrier at all	17%	13%	16%	24%	13%	22%	24%	13%	13%	16%	14%	14%	13%
Don't Know	3%	2%	3%	3%	5%	3%	3%	4%	3%	5%	6%	5%	7%
Which of the following, if any, are barriers to your business making more use of AI?:													
Concerns about current or future regulation of AI													
<i>BASE: All Respondents</i>													
This is a significant barrier	15%	20%	18%	10%	19%	14%	11%	12%	11%	15%	11%	15%	27%
This is a barrier	29%	28%	28%	30%	35%	29%	23%	29%	33%	33%	36%	26%	28%
This is not much of a barrier	34%	32%	29%	34%	27%	29%	35%	39%	42%	34%	33%	37%	29%
This is not a barrier at all	19%	17%	19%	21%	16%	26%	28%	12%	12%	16%	14%	14%	12%
Don't Know	3%	3%	6%	6%	3%	3%	3%	8%	2%	2%	5%	8%	4%
Which of the following, if any, are barriers to your business making more use of AI?:													
I do not know where to start													
<i>BASE: All Respondents</i>													
This is a significant barrier	6%	6%	9%	5%	10%	6%	4%	11%	2%	5%	12%	14%	22%
This is a barrier	17%	16%	27%	29%	35%	14%	10%	18%	23%	23%	22%	22%	21%
This is not much of a barrier	33%	33%	25%	34%	27%	29%	31%	44%	36%	36%	31%	28%	33%
This is not a barrier at all	38%	38%	35%	27%	22%	44%	50%	23%	35%	33%	29%	30%	19%
Don't Know	6%	7%	5%	5%	6%	7%	4%	5%	5%	3%	5%	6%	4%
Which of the following, if any, are barriers to your business making more use of AI?:													
Worry about the dangers of AI advancement in general													
<i>BASE: All Respondents</i>													
This is a significant barrier	12%	16%	12%	7%	11%	9%	10%	14%	6%	15%	13%	9%	23%
This is a barrier	25%	22%	32%	25%	34%	25%	18%	24%	35%	26%	40%	34%	28%
This is not much of a barrier	38%	39%	32%	39%	35%	35%	40%	41%	43%	36%	28%	32%	31%
This is not a barrier at all	22%	21%	19%	25%	14%	29%	29%	17%	14%	22%	14%	17%	12%
Don't Know	3%	3%	4%	4%	7%	2%	4%	5%	1%	2%	4%	8%	5%
Which of the following, if any, are barriers to your business making more use of AI?:													
Lack of skills in the company to use AI													
<i>BASE: Question randomly assigned to respondents</i>													
This is a significant barrier	12%	15%	13%	17%	21%	10%	10%	13%	7%	8%	14%	18%	34%
This is a barrier	32%	31%	31%	35%	37%	30%	30%	25%	34%	34%	36%	35%	35%
This is not much of a barrier	32%	34%	27%	28%	23%	34%	26%	42%	32%	32%	34%	24%	16%
This is not a barrier at all	22%	18%	24%	19%	10%	24%	30%	17%	26%	23%	12%	15%	11%
Don't Know	3%	3%	4%	1%	9%	2%	4%	3%	1%	2%	4%	7%	5%

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Weighted	1766	633	39	27	19	254	273	25	217	160	57	44	18
Which of the following, if any, are barriers to your business making more use of AI?													
I do not see how AI could be useful to our business													
<i>BASE: All Respondents</i>													
This is a significant barrier	10%	11%	14%	9%	13%	10%	8%	9%	6%	7%	12%	11%	22%
This is a barrier	17%	19%	22%	20%	22%	17%	9%	24%	17%	22%	21%	16%	31%
This is not much of a barrier	29%	27%	25%	36%	30%	24%	33%	42%	34%	27%	37%	31%	18%
This is not a barrier at all	40%	40%	34%	31%	28%	46%	48%	20%	39%	40%	27%	35%	25%
Don't Know	3%	3%	5%	4%	7%	3%	2%	4%	4%	4%	4%	8%	3%
What are the main barriers to your business making more use of AI? Select up to five of the following													
<i>BASE: All Respondents</i>													
Concerns about cybersecurity risks	26%	29%	29%	25%	39%	24%	26%	22%	20%	27%	27%	22%	28%
Concerns about legal requirements and liabilities of using AI	24%	25%	26%	22%	30%	21%	25%	20%	20%	24%	23%	30%	21%
Concerned about inaccuracy or misinformation from AI	23%	24%	26%	31%	33%	22%	20%	22%	24%	22%	26%	29%	35%
Cost of AI tools	23%	20%	23%	19%	29%	22%	26%	22%	26%	27%	23%	21%	20%
Concerned about current or future regulation of AI	21%	21%	20%	21%	23%	16%	21%	13%	22%	25%	19%	22%	19%
AI is not transparent enough in how it works	17%	16%	11%	15%	21%	22%	17%	18%	11%	17%	17%	16%	19%
Concerned about biases within AI	16%	16%	12%	19%	21%	12%	17%	19%	16%	19%	11%	17%	10%
We don't have the expertise to introduce AI	15%	13%	15%	28%	18%	10%	16%	15%	19%	15%	20%	20%	13%
We just have other priorities	14%	15%	11%	24%	14%	15%	12%	21%	13%	8%	15%	13%	21%
We don't have the skills to make use of AI	14%	10%	14%	22%	22%	13%	19%	16%	12%	16%	14%	22%	25%
Lack of customer demand for AI	14%	14%	21%	12%	14%	14%	9%	15%	16%	15%	10%	12%	13%
AI is unlikely to help us earn additional revenue	14%	12%	16%	21%	14%	13%	12%	16%	20%	12%	12%	14%	20%
Resistance to change within the enterprise	13%	12%	15%	10%	15%	18%	12%	16%	13%	9%	13%	10%	19%
We don't have the time to explore AI further	12%	14%	14%	13%	14%	14%	8%	8%	7%	16%	10%	8%	10%
AI is unlikely to help us cut costs	11%	10%	14%	20%	16%	11%	9%	15%	12%	8%	13%	17%	26%
I do not see how AI could be useful to our business	11%	8%	12%	17%	18%	13%	10%	15%	14%	11%	9%	18%	11%
Lack of support ecosystem (e.g. agencies/suppliers that can support)	11%	11%	18%	13%	17%	6%	9%	10%	11%	13%	13%	15%	29%
Access and availability of high speed internet connection	10%	11%	9%	12%	6%	11%	9%	18%	11%	6%	14%	15%	17%
Not sure where to start with the technology	10%	8%	12%	20%	12%	14%	7%	14%	12%	11%	19%	8%	12%
None of the above - there are no barriers to my business making more use of AI	9%	11%	10%	2%	2%	8%	15%	9%	6%	8%	4%	4%	4%
We already make extensive use of AI so have no need for more	6%	6%	5%	6%	8%	8%	3%	4%	4%	8%	5%	6%	8%
Don't Know	2%	3%	2%	1%	2%	1%	1%	2%	1%	2%	1%	4%	1%
Other (Please Specify)	0%	0%	1%	1%	1%	0%	0%	0%	0%	1%	1%	0%	1%

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	Total	Country											
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Weighted	1766	633	39	27	19	254	273	25	217	160	57	44	18
Which of the following are the biggest incentives for your business to make more use of AI? Select up to three of the following													
<i>BASE: All Respondents</i>													
It would save my employees time	29%	30%	34%	30%	27%	27%	24%	31%	29%	35%	25%	30%	25%
It would just make us more productive	28%	25%	28%	25%	35%	31%	38%	25%	30%	12%	27%	19%	28%
It would save me personally time	26%	29%	30%	31%	28%	24%	20%	26%	26%	31%	24%	21%	22%
It would make our business more profitable	23%	22%	16%	20%	18%	22%	21%	20%	25%	29%	23%	17%	21%
It would make us more competitive with other businesses in our sector	22%	18%	12%	30%	23%	19%	21%	21%	28%	30%	20%	27%	27%
It would allow us to scale-up the products or services we currently offer	21%	23%	15%	13%	20%	15%	26%	15%	20%	23%	18%	13%	17%
It would allow us to grow our business	21%	17%	25%	27%	26%	15%	28%	18%	23%	22%	24%	25%	28%
It would show that our business is innovative and up-to-date	20%	20%	20%	18%	20%	19%	21%	20%	18%	21%	17%	19%	24%
I think it will become the industry standard approach in the future	19%	19%	21%	20%	23%	24%	13%	16%	23%	16%	13%	26%	13%
It would allow us to sell new products or services	17%	18%	21%	16%	15%	11%	20%	12%	15%	14%	20%	22%	25%
Customers or clients are interested in an AI offer	14%	15%	14%	17%	8%	10%	9%	18%	17%	16%	17%	14%	25%
None of the above - there are no incentives for my business to make more use of AI	8%	9%	6%	8%	7%	9%	8%	8%	5%	3%	8%	7%	7%
Don't Know	2%	2%	4%	1%	5%	2%	1%	3%	0%	0%	3%	2%	1%
Other (Please Specify)	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
How confident or unconfident are you that your business has the right skills to take advantage of AI?													
<i>BASE: All Respondents</i>													
Very confident	28%	33%	26%	19%	23%	29%	29%	32%	21%	29%	16%	24%	33%
Somewhat confident	40%	44%	42%	40%	25%	33%	42%	32%	38%	41%	45%	39%	40%
Neither confident or unconfident	18%	13%	17%	21%	27%	21%	17%	20%	29%	16%	23%	14%	19%
Somewhat unconfident	8%	5%	6%	12%	16%	11%	9%	8%	10%	13%	7%	13%	5%
Not at all confident	3%	3%	6%	8%	5%	5%	2%	8%	1%	1%	5%	4%	3%
Don't Know	2%	2%	2%	2%	4%	2%	1%	2%	1%	1%	3%	5%	1%
Total Confident:	69%	77%	68%	58%	48%	62%	71%	63%	58%	69%	62%	63%	73%
Net:	-67%	-74%	-66%	-57%	-45%	-60%	-69%	-61%	-57%	-68%	-58%	-59%	-72%
In particular which, if any, of the following types of skills would you say your business needs more of to take full advantage of AI? Please select all that apply													
<i>BASE: All Respondents</i>													
AI strategy and implementation	39%	41%	35%	35%	41%	31%	37%	40%	43%	42%	31%	37%	33%
Data analysis skills	34%	33%	27%	29%	42%	31%	38%	31%	37%	35%	30%	31%	28%
Cybersecurity skills	34%	36%	34%	24%	36%	33%	30%	24%	31%	39%	30%	34%	36%
Skills in AI model customisation	31%	30%	31%	35%	29%	31%	32%	23%	31%	39%	28%	31%	26%
Skills with IT infrastructure (e.g. servers, computers)	31%	32%	34%	24%	33%	28%	34%	25%	31%	31%	20%	31%	23%
General digital skills	28%	24%	31%	26%	36%	30%	28%	30%	37%	32%	29%	28%	33%
AI ethics and responsible AI use skills	27%	27%	25%	25%	22%	16%	34%	22%	31%	33%	23%	27%	23%
Programming and coding	26%	25%	30%	27%	24%	22%	21%	32%	32%	30%	25%	24%	33%
Writing good prompts for AI models	23%	19%	28%	26%	19%	23%	20%	28%	30%	24%	24%	28%	27%
General entrepreneurship and designing new business systems	22%	19%	22%	21%	21%	23%	27%	21%	27%	22%	13%	19%	27%
None of the above - we have the skills we need	7%	9%	5%	4%	5%	7%	7%	6%	2%	3%	6%	6%	1%
Don't Know	3%	2%	3%	6%	3%	3%	3%	4%	1%	1%	6%	9%	3%

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Thinking about things that could help your business use AI, which of the following, if any, would be useful for your business? Select any which apply													
<i>BASE: All Respondents</i>													
Upskilling programmes for AI (e.g. training programmes)	42%	39%	35%	34%	42%	45%	50%	37%	40%	45%	40%	40%	28%
Best practice guides for how to use AI	36%	36%	32%	36%	45%	39%	38%	33%	34%	37%	30%	35%	30%
Improved education around AI in colleges and universities	34%	32%	30%	29%	33%	26%	42%	26%	42%	36%	28%	34%	39%
Guidance on how to comply with existing and new AI regulation	33%	39%	39%	25%	33%	27%	29%	30%	31%	34%	27%	33%	27%
Access to finance for AI (e.g. through resilience fund, grants on technology etc.)	31%	29%	31%	25%	37%	26%	34%	30%	32%	38%	24%	30%	41%
Partnership facilitation (e.g. innovation hubs, workshops) with larger companies	28%	28%	27%	28%	23%	25%	27%	37%	28%	28%	17%	26%	30%
Programs to help small and medium enterprises recruit from students in higher education	26%	26%	22%	18%	23%	21%	22%	32%	31%	37%	26%	26%	26%
Knowledge sharing forums with established companies using AI	24%	26%	31%	25%	36%	23%	21%	35%	20%	25%	26%	27%	30%
None of the above	8%	10%	6%	7%	4%	9%	9%	6%	5%	5%	9%	6%	6%
Don't Know	3%	2%	3%	5%	4%	3%	4%	3%	1%	1%	6%	7%	6%
You said that upskilling programmes for AI would be useful for your business. Which of the following, if any, would you like to see deliver these sorts of programmes? Select any which apply													
<i>BASE: All Respondents</i>													
Technology companies	54%	52%	51%	44%	51%	49%	60%	49%	63%	57%	51%	54%	59%
Online training programme providers	45%	50%	42%	32%	46%	34%	45%	40%	51%	47%	40%	39%	46%
Teams or individuals within my business	42%	49%	33%	33%	42%	38%	44%	35%	37%	36%	31%	37%	38%
Universities and educational institutions	38%	36%	42%	35%	35%	33%	36%	33%	40%	52%	40%	37%	35%
The National Government	27%	25%	35%	20%	42%	25%	23%	30%	28%	45%	19%	25%	28%
None of the above	5%	6%	5%	6%	2%	7%	4%	6%	3%	2%	5%	4%	2%
Don't Know	3%	2%	7%	9%	8%	5%	3%	4%	0%	1%	4%	9%	4%
Do you agree or disagree with the following?: I am excited about the possibilities AI brings for my business													
<i>BASE: All Respondents</i>													
Strongly Agree	33%	34%	42%	29%	22%	32%	35%	30%	29%	36%	21%	33%	25%
Agree	37%	35%	32%	40%	39%	39%	34%	37%	44%	37%	42%	35%	52%
Neither Agree nor Disagree	18%	18%	15%	16%	25%	15%	19%	20%	17%	21%	26%	19%	13%
Disagree	5%	5%	6%	9%	7%	6%	5%	7%	7%	2%	6%	4%	8%
Strongly Disagree	6%	8%	2%	5%	6%	8%	5%	6%	3%	3%	4%	7%	2%
Don't Know	1%	1%	3%	1%	1%	1%	1%	0%	0%	1%	1%	3%	0%
Total Agree:	70%	69%	74%	69%	61%	71%	69%	67%	73%	73%	63%	68%	77%
Total Disagree:	11%	13%	8%	14%	13%	13%	11%	13%	10%	5%	10%	10%	10%
Net:	59%	57%	66%	55%	48%	57%	58%	54%	63%	69%	53%	58%	67%

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Do you agree or disagree with the following?: I try to keep up with the latest advancements in AI													
<i>BASE: All Respondents</i>													
Strongly Agree	32%	31%	32%	20%	17%	34%	40%	30%	33%	38%	16%	22%	28%
Agree	41%	43%	45%	40%	44%	42%	36%	36%	44%	35%	49%	41%	45%
Neither Agree nor Disagree	17%	15%	16%	23%	21%	16%	17%	22%	19%	17%	24%	17%	20%
Disagree	4%	4%	3%	10%	10%	4%	3%	8%	4%	6%	6%	11%	5%
Strongly Disagree	4%	6%	3%	5%	4%	3%	3%	4%	0%	3%	4%	6%	1%
Don't Know	1%	1%	2%	2%	3%	1%	1%	1%	0%	0%	2%	2%	0%
Total Agree:	74%	74%	76%	60%	62%	76%	76%	66%	74%	74%	64%	63%	74%
Total Disagree:	8%	10%	6%	15%	14%	7%	6%	12%	4%	9%	10%	17%	7%
Net:	65%	64%	70%	45%	47%	70%	69%	54%	72%	64%	54%	46%	67%
Do you agree or disagree with the following?: The Government in [country] is enabling me to capture the benefits of AI													
<i>BASE: All Respondents</i>													
Strongly Agree	16%	21%	17%	16%	13%	16%	7%	31%	12%	14%	10%	17%	23%
Agree	29%	32%	27%	40%	33%	33%	15%	31%	29%	28%	30%	30%	33%
Neither Agree nor Disagree	28%	26%	31%	24%	23%	28%	26%	19%	36%	27%	32%	33%	31%
Disagree	15%	11%	13%	6%	20%	8%	30%	7%	19%	15%	15%	6%	7%
Strongly Disagree	9%	7%	3%	6%	5%	10%	20%	7%	3%	14%	6%	6%	5%
Don't Know	3%	4%	8%	8%	5%	4%	2%	6%	0%	3%	8%	8%	1%
Total Agree:	45%	53%	44%	56%	46%	49%	22%	62%	41%	41%	40%	47%	56%
Total Disagree:	24%	18%	16%	12%	25%	19%	50%	14%	22%	29%	20%	12%	12%
Net:	20%	36%	28%	44%	21%	31%	-28%	48%	19%	12%	19%	35%	44%
Do you agree or disagree with the following?: I need more support to bring AI into my business													
<i>BASE: All Respondents</i>													
Strongly Agree	19%	19%	22%	19%	26%	23%	15%	31%	17%	24%	13%	22%	30%
Agree	40%	36%	33%	38%	42%	38%	42%	37%	47%	43%	51%	41%	36%
Neither Agree nor Disagree	22%	24%	26%	24%	17%	22%	23%	17%	19%	22%	22%	20%	27%
Disagree	10%	10%	14%	9%	11%	7%	12%	5%	12%	9%	8%	8%	4%
Strongly Disagree	7%	8%	3%	8%	2%	9%	7%	7%	4%	3%	5%	6%	3%
Don't Know	2%	3%	2%	1%	3%	0%	1%	3%	1%	0%	1%	3%	1%
Total Agree:	59%	55%	55%	57%	68%	61%	57%	68%	64%	66%	64%	63%	66%
Total Disagree:	17%	18%	17%	18%	13%	16%	19%	12%	16%	11%	13%	14%	6%
Net:	43%	37%	38%	40%	55%	45%	38%	56%	48%	55%	51%	50%	59%
In general, what impact do you expect the improvements to AI over the next 5 years to have on your business headcount, if any?													
<i>BASE: All Respondents</i>													
Greatly increase headcount	11%	11%	19%	7%	16%	8%	9%	30%	11%	11%	11%	16%	23%
Somewhat increase headcount	34%	35%	24%	23%	20%	32%	36%	24%	36%	36%	29%	28%	39%
Not change headcount	36%	36%	36%	40%	32%	41%	38%	32%	33%	33%	36%	41%	24%
Somewhat decrease headcount	13%	12%	12%	21%	20%	13%	10%	10%	16%	14%	15%	9%	11%
Greatly decrease headcount	2%	2%	3%	4%	3%	2%	1%	1%	2%	2%	2%	0%	0%
Don't Know	4%	4%	6%	6%	9%	3%	6%	3%	2%	4%	7%	6%	3%

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Thinking about the jobs in your company, are there any which you believe AI could do almost all of in the next 5 years?													
<i>BASE: All Respondents</i>													
Yes, every job in my company could be done almost entirely by AI in the next 5 years	11%	11%	13%	14%	9%	11%	9%	26%	10%	7%	4%	19%	20%
Yes, the majority of the jobs in my company could be done almost entirely by AI in the next 5 years	24%	23%	24%	19%	21%	27%	23%	21%	28%	26%	19%	16%	18%
Yes, around half of the jobs in my company could be done almost entirely by AI in the next 5 years	19%	17%	16%	16%	16%	11%	23%	13%	29%	25%	20%	15%	20%
Yes, a minority of the jobs in my company could be done almost entirely by AI in the next 5 years	14%	14%	12%	13%	14%	13%	14%	13%	15%	20%	12%	16%	13%
Yes, a very small number of the jobs in my company could be done almost entirely by AI in the next 5 years	11%	13%	10%	21%	6%	13%	10%	7%	4%	11%	18%	15%	8%
No, none of the jobs in my company could be done almost entirely by AI in the next 5 years	16%	18%	20%	15%	26%	20%	18%	14%	10%	9%	21%	14%	16%
Don't Know	4%	3%	5%	2%	8%	5%	4%	6%	5%	2%	6%	5%	4%
You said there were at least some jobs in your company which you expect could be done almost entirely by AI in the next 5 years. Which of the following best describes how your company would respond to these instances?													
<i>BASE: At least some could be automated</i>													
We would keep hiring human employees for these roles, even if AI can do the majority of them	29%	32%	45%	25%	31%	28%	18%	42%	29%	29%	21%	31%	38%
We would use AI for the majority of these roles, and reskill/redeploy the human employees to other areas or tasks	52%	54%	33%	48%	42%	52%	57%	40%	54%	44%	47%	49%	46%
We would use AI for the majority of these roles, and expect employees to work fewer hours	14%	11%	13%	19%	18%	18%	16%	10%	12%	20%	23%	14%	16%
We would cut down on employee headcount and make more use of AI instead	4%	2%	7%	6%	8%	1%	5%	5%	4%	6%	7%	3%	0%
Don't Know	1%	1%	2%	2%	1%	1%	3%	3%	1%	1%	2%	2%	1%
Which of the following comes closest to your view?													
<i>BASE: All Respondents</i>													
AI will change the way my business operates forever	55%	56%	55%	38%	50%	55%	59%	58%	53%	54%	52%	56%	53%
AI is unlikely to have much of an impact on the way my business operates	38%	38%	39%	47%	38%	37%	32%	36%	40%	39%	40%	34%	38%
Don't Know	7%	6%	5%	16%	12%	8%	9%	6%	8%	7%	8%	9%	9%
Which of the following comes closest to your view?													
<i>BASE: All Respondents</i>													
AI is a short-term trend which will pass	13%	14%	9%	13%	16%	16%	8%	10%	13%	13%	14%	13%	12%
AI is here to stay	81%	81%	87%	78%	76%	76%	82%	84%	79%	85%	78%	81%	85%
Don't Know	6%	5%	4%	9%	8%	8%	10%	6%	8%	2%	8%	6%	3%
Which of the following comes closest to your view?													
<i>BASE: All Respondents</i>													
My business is ahead of most on AI use	28%	28%	24%	17%	21%	34%	33%	29%	18%	27%	17%	28%	25%
My business is not ahead on AI use, but if we start using it more now we will be	52%	49%	48%	56%	52%	49%	51%	42%	64%	57%	57%	50%	52%
My business is already too late to be ahead on AI use	11%	15%	20%	18%	14%	8%	4%	18%	8%	12%	12%	10%	18%
Don't Know	9%	9%	8%	9%	13%	8%	11%	11%	10%	3%	13%	11%	5%

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In general, do you think the increasing use of AI will have a positive or negative impact on the following aspects of business?: Business security													
<i>BASE: All Respondents</i>													
A very positive impact	23%	27%	27%	16%	18%	17%	22%	33%	17%	25%	12%	21%	27%
A positive impact	38%	33%	36%	33%	35%	41%	35%	26%	46%	47%	38%	30%	38%
Neither a positive nor negative impact	27%	26%	25%	34%	27%	27%	33%	27%	25%	22%	33%	27%	25%
A negative impact	8%	9%	7%	13%	11%	8%	7%	6%	6%	2%	10%	12%	4%
A very negative impact	2%	2%	1%	2%	3%	3%	0%	2%	2%	1%	1%	2%	1%
Don't Know	3%	2%	3%	2%	5%	4%	3%	6%	4%	2%	6%	8%	5%
In general, do you think the increasing use of AI will have a positive or negative impact on the following aspects of business?: Business sustainability													
<i>BASE: All Respondents</i>													
A very positive impact	23%	24%	21%	10%	18%	14%	24%	30%	25%	34%	12%	23%	31%
A positive impact	37%	31%	39%	36%	40%	43%	40%	28%	45%	39%	41%	33%	40%
Neither a positive nor negative impact	30%	35%	25%	45%	26%	34%	27%	30%	20%	21%	34%	30%	20%
A negative impact	4%	5%	9%	5%	6%	3%	5%	5%	4%	3%	5%	3%	5%
A very negative impact	2%	3%	2%	2%	3%	1%	1%	1%	2%	1%	2%	2%	0%
Don't Know	4%	3%	4%	2%	7%	4%	3%	6%	4%	3%	6%	8%	3%
In general, do you think the increasing use of AI will have a positive or negative impact on the following aspects of business?: Business innovation													
<i>BASE: All Respondents</i>													
A very positive impact	32%	33%	34%	19%	27%	22%	42%	32%	28%	35%	21%	30%	28%
A positive impact	43%	40%	43%	44%	45%	48%	35%	35%	50%	50%	45%	44%	50%
Neither a positive nor negative impact	18%	17%	17%	29%	16%	22%	18%	26%	16%	10%	23%	18%	15%
A negative impact	4%	6%	3%	5%	4%	4%	2%	2%	4%	2%	5%	3%	2%
A very negative impact	2%	2%	1%	0%	3%	1%	1%	0%	1%	1%	1%	1%	1%
Don't Know	2%	1%	3%	3%	5%	4%	2%	5%	1%	1%	5%	5%	3%
In general, do you think the increasing use of AI will have a positive or negative impact on the following aspects of business?: Business productivity													
<i>BASE: All Respondents</i>													
A very positive impact	36%	39%	34%	26%	19%	33%	40%	38%	32%	38%	26%	27%	32%
A positive impact	40%	38%	41%	43%	51%	41%	33%	33%	47%	46%	40%	51%	47%
Neither a positive nor negative impact	16%	17%	17%	23%	19%	16%	17%	19%	14%	11%	26%	13%	13%
A negative impact	3%	3%	4%	4%	3%	4%	4%	3%	2%	3%	3%	3%	4%
A very negative impact	2%	3%	1%	2%	3%	1%	3%	3%	2%	2%	0%	1%	1%
Don't Know	2%	1%	4%	2%	4%	4%	2%	4%	2%	1%	4%	4%	3%
In general, do you think the increasing use of AI will have a positive or negative impact on the following aspects of business?: Business growth													
<i>BASE: All Respondents</i>													
A very positive impact	29%	31%	27%	17%	18%	23%	33%	32%	27%	34%	17%	30%	40%
A positive impact	43%	40%	45%	44%	47%	49%	39%	41%	53%	41%	45%	40%	35%
Neither a positive nor negative impact	22%	24%	19%	31%	25%	22%	22%	22%	15%	22%	27%	21%	20%
A negative impact	2%	1%	3%	5%	3%	1%	4%	3%	2%	1%	4%	3%	1%
A very negative impact	1%	3%	1%	1%	3%	0%	0%	0%	1%	1%	2%	1%	1%
Don't Know	3%	2%	4%	2%	4%	5%	2%	3%	2%	1%	4%	4%	3%

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	Total	Country											
		Germany	Belgium	Finland	Ireland	France	Italy	Denmark	Poland	Spain	Netherlands	Sweden	Norway
Unweighted	1766	249	142	158	121	135	148	150	138	140	149	144	92
Weighted	1766	633	39	27	19	254	273	25	217	160	57	44	18
In general, do you think the increasing use of AI will have a positive or negative impact on the following aspects of business?: Business turnover													
<i>BASE: All Respondents</i>													
A very positive impact	26%	29%	26%	19%	17%	22%	29%	31%	23%	28%	9%	21%	26%
A positive impact	43%	38%	40%	47%	35%	40%	43%	39%	55%	51%	49%	44%	45%
Neither a positive nor negative impact	23%	26%	26%	26%	33%	28%	19%	19%	17%	18%	31%	26%	22%
A negative impact	3%	2%	2%	4%	3%	4%	4%	4%	2%	2%	5%	2%	2%
A very negative impact	2%	2%	0%	1%	5%	2%	1%	2%	0%	1%	1%	3%	2%
Don't Know	3%	3%	5%	3%	7%	4%	4%	4%	2%	1%	5%	4%	3%
Which of the following comes closest to your view on the impact AI will have on the roles at your business?													
<i>BASE: All Respondents</i>													
AI will mainly work as a complement to existing roles	48%	47%	47%	49%	56%	48%	54%	41%	46%	50%	45%	46%	51%
AI will mainly work to replace existing roles	30%	31%	38%	27%	24%	30%	23%	36%	37%	27%	34%	23%	31%
AI will neither replace nor complement existing roles	18%	19%	12%	21%	17%	17%	20%	21%	11%	21%	17%	25%	12%
Don't Know	4%	4%	3%	3%	3%	5%	3%	3%	6%	3%	5%	6%	6%
Do you think an AI would ever be capable of doing your job?													
<i>BASE: All Respondents</i>													
Yes, AI is already capable of doing my job	10%	13%	17%	9%	8%	11%	4%	24%	4%	5%	7%	19%	22%
Yes, AI could do my job within the next 5 years	26%	24%	21%	17%	20%	21%	26%	24%	46%	25%	21%	17%	19%
Yes, AI could do my job in the next 6-10 years	15%	13%	16%	25%	12%	19%	17%	13%	14%	17%	17%	8%	18%
AI could eventually do my job, but not for at least 10 years	13%	12%	10%	19%	13%	17%	8%	11%	12%	19%	12%	22%	12%
AI could never do my job	31%	34%	30%	29%	41%	29%	38%	24%	19%	30%	38%	29%	24%
Don't Know	5%	4%	6%	1%	7%	3%	7%	4%	5%	3%	5%	5%	5%
Have you been involved in any of the following at your workplace? Select any which apply													
<i>BASE: All Respondents</i>													
Discussions about how to use AI at your organisation	48%	46%	44%	47%	43%	56%	56%	44%	44%	43%	41%	45%	42%
Discussions about the impact AI will have on your sector	44%	44%	45%	43%	40%	42%	47%	40%	45%	45%	39%	47%	40%
Discussions about how your colleagues are using AI in their work	43%	42%	43%	40%	37%	44%	40%	44%	53%	38%	33%	37%	44%
Discussions about how your colleagues are using AI in their spare time	31%	31%	37%	29%	40%	33%	23%	30%	40%	29%	26%	37%	37%
Don't Know	2%	0%	2%	1%	4%	5%	1%	1%	3%	2%	3%	3%	3%
None of the above	17%	19%	18%	19%	18%	12%	22%	16%	9%	20%	23%	18%	15%

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	Total	Country											
		Germany	Belgium	Finland	Ireland	France	Italy	Denmark	Poland	Spain	Netherlands	Sweden	Norway
Unweighted	1766	249	142	158	121	135	148	150	138	140	149	144	92
Weighted	1766	633	39	27	19	254	273	25	217	160	57	44	18
Thinking about how AI could be used in businesses, which of the following tasks do you think AI will be most able to do, if any? Select up to three of the following													
<i>BASE: All Respondents</i>													
Tasks which are very repetitive	47%	46%	48%	47%	53%	54%	44%	34%	41%	53%	41%	39%	47%
Tasks which require a lot of work with numbers	38%	37%	38%	34%	39%	27%	48%	36%	39%	42%	32%	41%	40%
Tasks which require a lot of writing	38%	47%	44%	32%	37%	30%	31%	27%	34%	30%	32%	37%	35%
Tasks which require a lot of reading	29%	28%	32%	31%	37%	31%	17%	30%	38%	31%	34%	28%	36%
Tasks which require creativity or novelty	25%	25%	22%	26%	14%	23%	25%	28%	26%	28%	28%	20%	27%
Tasks which require managing money or finances	23%	22%	20%	21%	28%	22%	21%	27%	23%	25%	23%	26%	27%
Tasks which require a lot of attention to detail	22%	17%	23%	27%	22%	22%	25%	30%	31%	23%	22%	26%	33%
Tasks which require communication with humans	20%	23%	20%	17%	18%	14%	27%	25%	16%	14%	13%	17%	21%
None of the above could ever be done by AI	3%	3%	2%	2%	3%	3%	4%	3%	3%	2%	3%	2%	1%
Don't Know	2%	1%	3%	4%	3%	3%	2%	3%	0%	1%	5%	4%	1%
Thinking about how AI could be used in businesses, which of the following tasks do you think AI will be least able to do? Select up to three of the following													
<i>BASE: All Respondents</i>													
Tasks which require communication with humans	36%	39%	39%	23%	42%	30%	30%	33%	34%	40%	44%	44%	44%
Tasks which require creativity or novelty	34%	33%	40%	22%	48%	32%	38%	31%	38%	29%	27%	36%	30%
Tasks which require a lot of attention to detail	30%	35%	23%	25%	35%	30%	23%	32%	24%	30%	26%	27%	33%
Tasks which require a lot of writing	22%	22%	23%	37%	25%	27%	15%	33%	22%	25%	25%	21%	27%
Tasks which require a lot of work with numbers	22%	21%	20%	28%	21%	21%	19%	27%	29%	24%	19%	26%	13%
Tasks which require managing money or finances	19%	18%	20%	16%	21%	23%	21%	18%	13%	24%	18%	20%	19%
Tasks which are very repetitive	17%	16%	19%	23%	20%	16%	19%	21%	18%	15%	15%	14%	23%
Tasks which require a lot of reading	11%	10%	13%	18%	10%	10%	16%	12%	12%	12%	9%	4%	16%
Don't Know	7%	5%	5%	9%	5%	8%	7%	6%	7%	7%	9%	8%	6%
In general, which of the following best describe the tasks which AI could do in your organisation?													
<i>BASE: All Respondents</i>													
AI could mostly do the tasks which people enjoy the least	38%	39%	45%	30%	40%	36%	40%	41%	36%	32%	38%	47%	43%
AI could do both tasks which people enjoy the most and the least	38%	37%	28%	36%	28%	36%	37%	34%	42%	47%	38%	28%	32%
AI could mostly do the tasks which people enjoy the most	11%	11%	9%	14%	7%	10%	9%	10%	13%	12%	9%	9%	9%
AI could not do any tasks in my organisation	8%	8%	8%	12%	12%	10%	8%	8%	6%	4%	7%	7%	7%
Don't Know	6%	5%	8%	8%	13%	9%	6%	7%	3%	5%	8%	9%	8%