LANGUAGE MATTERS: AI USER PERCEPTIONS

A VALOIR REPORT

February 2024

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As enterprise application vendors continue to evolve and deliver their artificial intelligence (AI) solutions to the market, how they are perceived by users is important for acceptance, effective adoption and, ultimately, the value they deliver. In our study of end users, Valoir found that language matters, and many users are still waiting to hear the magic words that will make them trust – and effectively adopt – AI. Seventeen percent of workers believe AI can't help them at work, and much of it is a question of trust: one in 10 workers couldn't name a company they would trust with AI.

Since the announcement of the first version of Chat GPT more than a year ago, enterprise application software vendors have been rushing AI-related product announcements to the market – and been met with varying levels of skepticism. Concerns about risk, bias, ethics, and safety have put the hold on broad adoption of many AI tools and applications – from all levels of the organization.

As vendors continue to evolve their AI expertise, they will also need to evolve how they communicate the relative strengths of their solutions to marketplace and, ultimately, communicate why users should trust and adopt them.

To better understand the perceptions of today's business users about AI and its potential value and risk in the workplace, Valoir surveyed more than 300 workers in North America from a variety of industries and job roles, and validated the survey responses with in-depth interviews with a smaller sample of workers. We asked them about their experience to with AI to date, how and if AI would be helpful to them in their current job roles, and what vendors needed to do and say to drive adoption and effective use of their AI solutions.

Key findings

Key findings from our analysis include:

- Although the vast majority (84 percent) of workers have experimented with some form of generative AI, there's still a lot of confusion around what is – and what isn't – AI, and how it works.
- Many users question AI's potential value and risk. Although that sounds obvious, 17 percent of workers believe AI can't help them at work – meaning vendors still need to make a compelling case for what's in it for individual users.
- For those that do believe AI can help them at work, AI-assisted search is the most common area where they believe AI can be helpful, meaning there's still more training and communication

Seventeen percent of workers believe AI can't help them at work.

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to be done around other areas like assisted authoring and recommendations and coaching.

- Despite the current industry momentum around the term co-pilot, it's not a term that endears users to AI or drives them to adopt it. Workers said they would be most likely to use AI when it's a virtual assistant, with nearly 50 percent choosing that term over other options including copilot.
- Training is a hurdle to adoption. Eighty-seven percent of workers said AI should be easy and intuitive and require no data science or AI expertise (such as learning how to write prompts).
- Concerns about risks have not been quelled – yet. When it comes to concerns about AI, workers were most concerned that it would violate their privacy (51 percent), followed by fears that it would act on its own without human intervention (45 percent). Thirty-eight percent are very concerned that AI could replace them.
- The vendor AI battle is about trust, and it is just beginning. Although many workers could name companies they wouldn't trust with AI, there was no consensus around the most trusted AI vendor – or even what that vendor profile looked like.
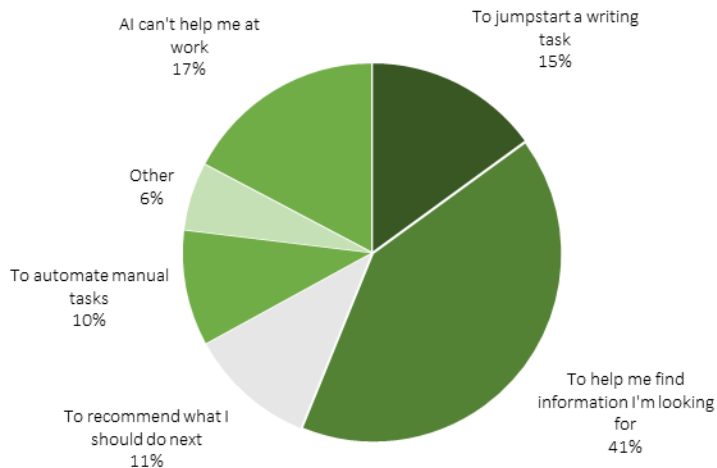
AI expectations and perceptions of value

When exploring the early perceptions and expectations for AI, Valoir asked workers about their experience with and awareness of AI (and generative AI) tools and applications as well as what would be more or less likely to make them invest the time and effort in learning to use them effectively. We found that 84 percent of users had some experience with at least one generative AI application; however, 12 percent were not familiar with them at all.

Although nearly one in five workers (17%) said they didn't believe AI could help them at work, most saw the most helpful application of AI as an extension or enhancement of their current searching capabilities. Although this is certainly a potential benefit of AI, it is only one area where AI can be applied to drive productivity and efficiency.

Only 15 percent of workers thought AI could help them to jumpstart a writing task. Many vendors have – and rightfully so – focused on assisted authoring as a key area of AI functionality development, meaning there's more work to do in making those capabilities visible, accessible, and desirable to end users. Other areas workers cited where they could potentially benefit from AI included getting recommended actions (11 percent) and automating manual tasks (11 percent).
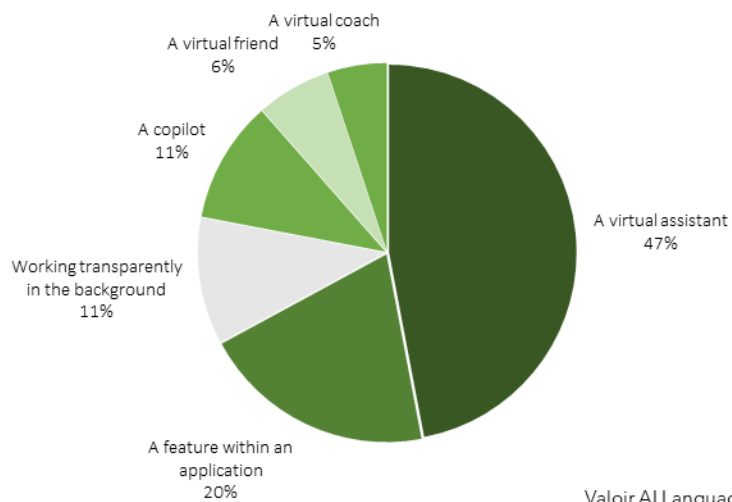
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How AI can be most helpful at work

To jumpstart a writing task 15%

AI can't help me at work 17%

Other 6%

To automate manual tasks 10%

To recommend what I should do next 11%

To help me find information I'm looking for 41%

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We also asked workers about whether they would be more or less likely to adopt an AI application based on what it was called or how it was explained to them. Although there has been some recent momentum around the use of "copilot" as the common term of art for an AI-enabled application, we found it was not the preferred term of users. In fact, nearly 50 percent of workers said they would be most likely to use a virtual assistant rather than an AI application with other labels.

What kind of AI users would be most likely to use
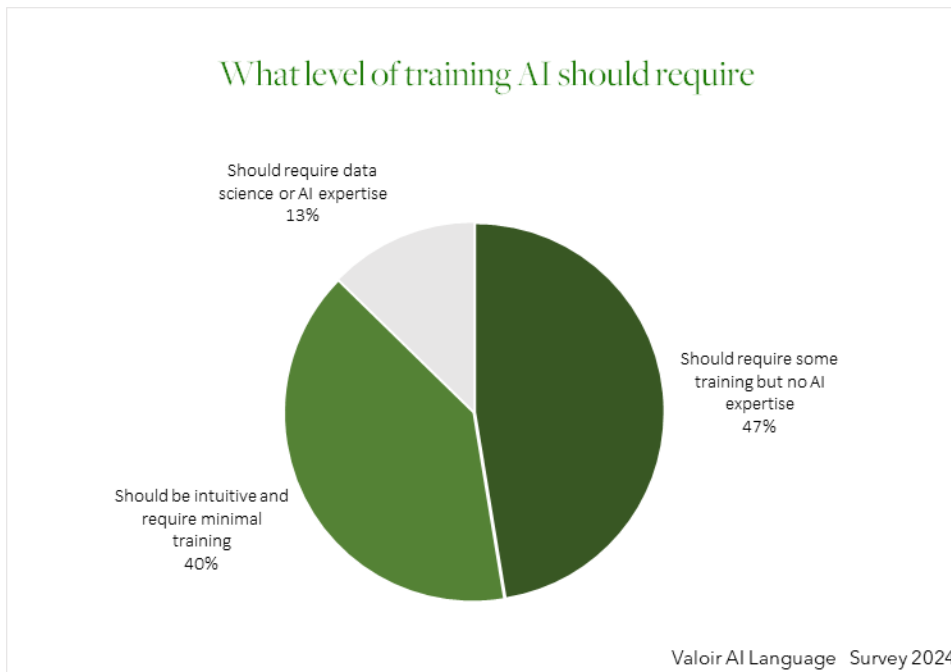
A virtual coach 5%

A virtual friend 6%

A copilot 11%

Working transparently in the background 11%

A virtual assistant 47%

A feature within an application 20%

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How should AI work? Most workers agree that AI should be transparent, telling users where and how it's being used and explaining what data it's relying on to deliver its outputs. The vast majority of workers (94 percent) believe that AI should give recommendations and let them decide how to act (commonly known as "a human in the loop"). Only 6 percent of workers believe AI should automatically act for them.

How AI should work

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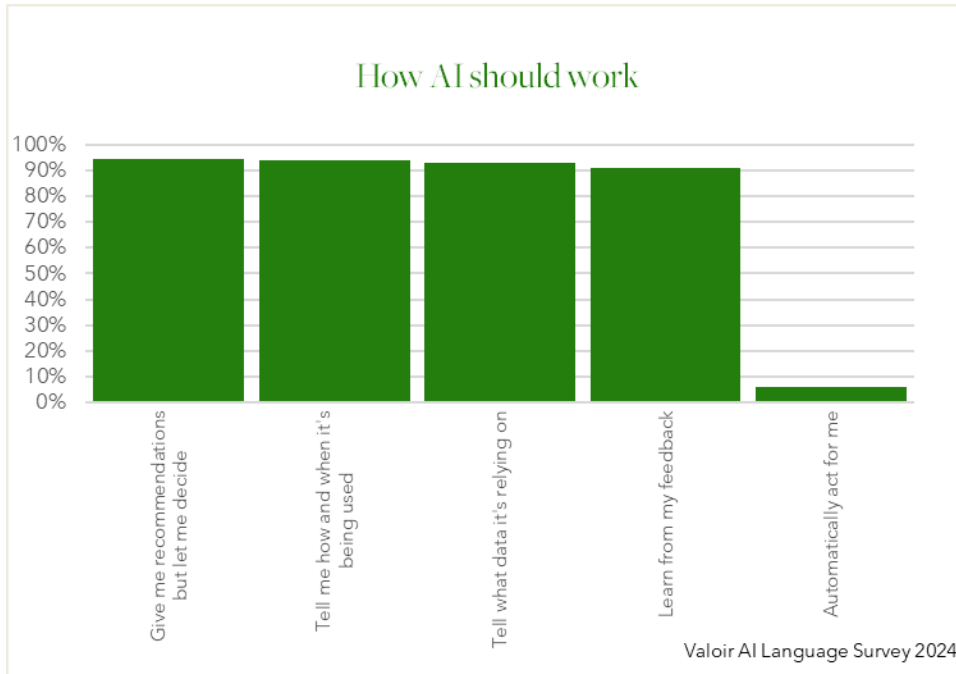
We also asked users about what kind of training AI applications should require for effective use, and whether or not (and when) they would be willing to invest in training for new applications.

What level of training AI should require

Should require data science or AI expertise
13%

Should require some training but no AI expertise
47%

Should be intuitive and require minimal training
40%

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Only 13 percent of workers said AI should require some data science or AI expertise. Instead, nearly 50 percent said AI should require some training but not specific expertise (such as prompt writing), and 40 percent said it should be intuitive and require minimal training.

When asked about what kind of AI training would help them the most in their jobs, the most common response was not around technical or application knowledge or data science expertise – or even how to automate tasks with AI.

Forty-eight percent of workers said they would be most interested in training that showed them how to use AI to make their job easier (the most popular response).

Brand awareness

Although many vendors have been delivering AI-enabled applications to the market for years, there is no consensus among workers on the leader in AI. When asked unprompted to name the company most associated with AI, only four companies had more than 5 percent of workers' mind share, and more than 5 percent couldn't name a company.

Company most associated with AI

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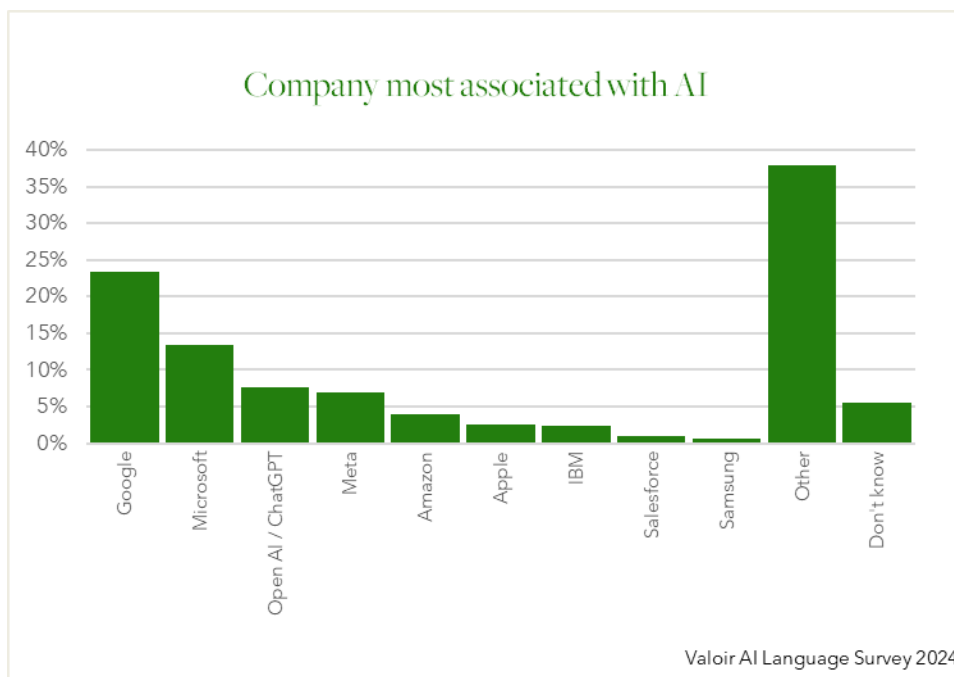
Of the companies in the top 9, only one is an emerging technology vendor. Obviously the visibility Open AI gained with the consumer-facing generative AI capabilities of Chat GPT in the past 2 years raised its brand awareness among consumers and workers. However, Apple, with a similar consumer focus and end-user appeal (and AI capabilities within its consumer products for years) didn't make the top five. This suggests

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that having consumer-grade accessibility is not enough to gain the attention of workers as an AI leader, and that the battle for mindshare in the AI space is just beginning. The low presence of IBM on this list – despite decades of promoting Watson – show that depth, size, or longevity of AI assets have little bearing on workers' perception of AI presence in the market.

We also asked workers which vendor they most closely associated with the term copilot, which has been adopted by a number of vendors as the brand name for their AI product offering. While Microsoft led in mindshare for the term copilot, many of the others that topped the list don't have currently have a product branded as a copilot, suggesting that copilot is still seen as more of a generic term for AI capabilities than a specific product.
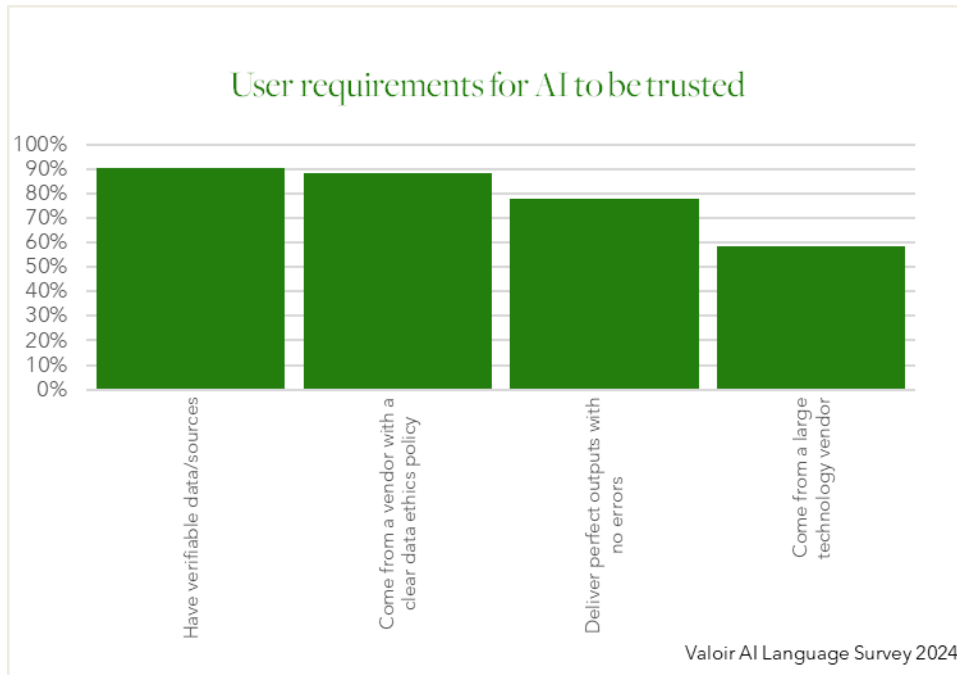
Company most associated with an AI copilot

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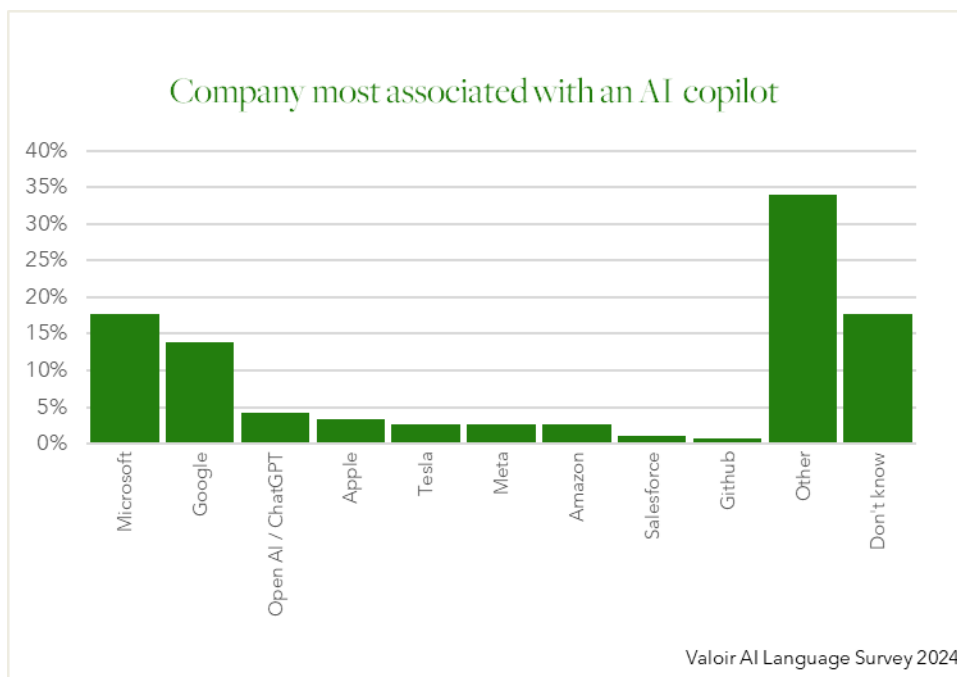
Trust in AI

Obviously, a key factor in effective adoption of any AI application or technology is trust. The key factors on workers' AI "trust meter" are focused on actions (transparent) and outputs (correct), not longevity or brand name. In our study, only 59 percent of workers said they believed AI needed to come from a large technology vendor to be trusted (and a significant minority said they would be more likely to trust AI if it came from an emerging innovator, not a tech giant). From the vendor perspective, workers believe they can most trust AI when it comes from a vendor with clear data ethics and privacy policies. At the application
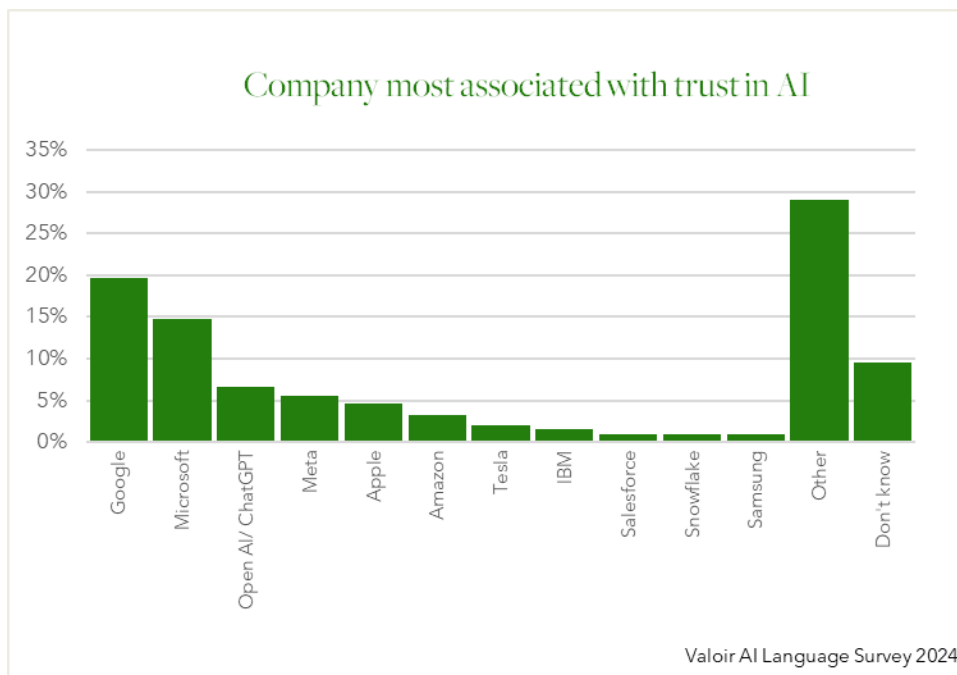
> When it comes to trust, workers are focused on actions and outputs, not longevity or brand name.

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level, verifiable data and sources were the top trust factors, followed by no-error outputs.

User requirements for AI to be trusted

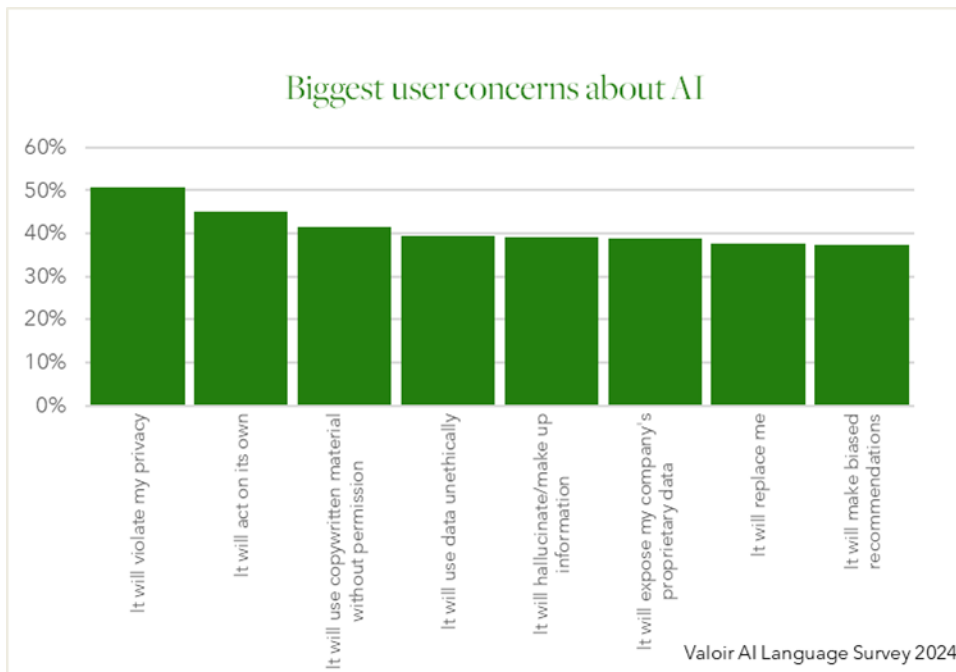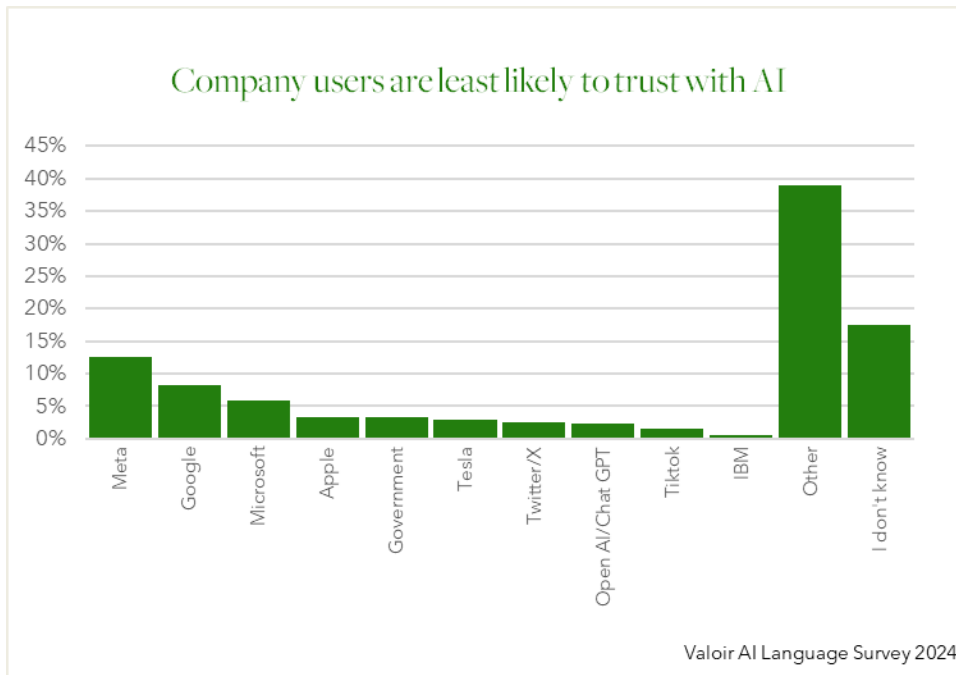| Category	Value
Have verifiable data/sources	90%
Come from a vendor with a clear data ethics policy	88%
Deliver perfect outputs with no errors	77%
Come from a large technology vendor	58%

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Although long-standing brand names as a category weren't necessarily synonymous with trusted AI, brand and name recognition did play a factor in workers' unprompted naming of the organizations they most associated with trust in AI.

Company most associated with trust in AI

Company	Value
Google	20%
Microsoft	15%
Open AI/ ChatGPT	6%
Meta	5%
Apple	4%
Amazon	3%
Tesla	2%
IBM	1%
Salesforce	<1%
Snowflake	<1%
Samsung	<1%
Other	29%
Don't know	9%

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When it came to the brand names most closely associated with "trust in AI," workers mentioned mostly the same brands they associated with AI, with Google and Microsoft leading the list. However, 1 in 10 workers unable to name a company they associate with trusted AI.

When we asked what company workers were *least* likely to trust *with* AI, Meta led the pack, cited almost twice as often as the next most common answer, Google. Microsoft, Apple, and the government were the next most common answers followed by companies owned by Elon Musk (Tesla and Twitter/X).

Company users are least likely to trust with AI

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Biggest user concerns about AI

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Trusting an application or vendor becomes all the most important when privacy, security, and jobs are at risk – all worker concerns with AI.

When workers worry about AI, privacy is their most common concern, with 51 percent of users very concerned that AI could violate their privacy. Other concerns included that AI would act on its own without human intervention (45 percent), use unauthorized copywritten material (42 percent), use data unethically (40 percent), hallucinate (39 percent), replace them (38 percent), or make biased recommendations (37 percent).

Looking ahead

As vendors continue to invest in both research and development and sales and marketing to bring their AI capabilities to workers across all industries and geographies, it's important to remember that although AI is transformative, it is just like any other technology: if the users won't use it, the return on investment will be negative. As vendors weigh their branding, training, and communications strategies around AI, language matters – particularly when workers are concerned that AI may replace them. Trust will be a key factor for effective adoption not just by organizations but by individual users. Clear communication about policies and practices, transparency, and a clear role-based explanation of how the technology benefits them – not just how it works – will be critical to building that trust.

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