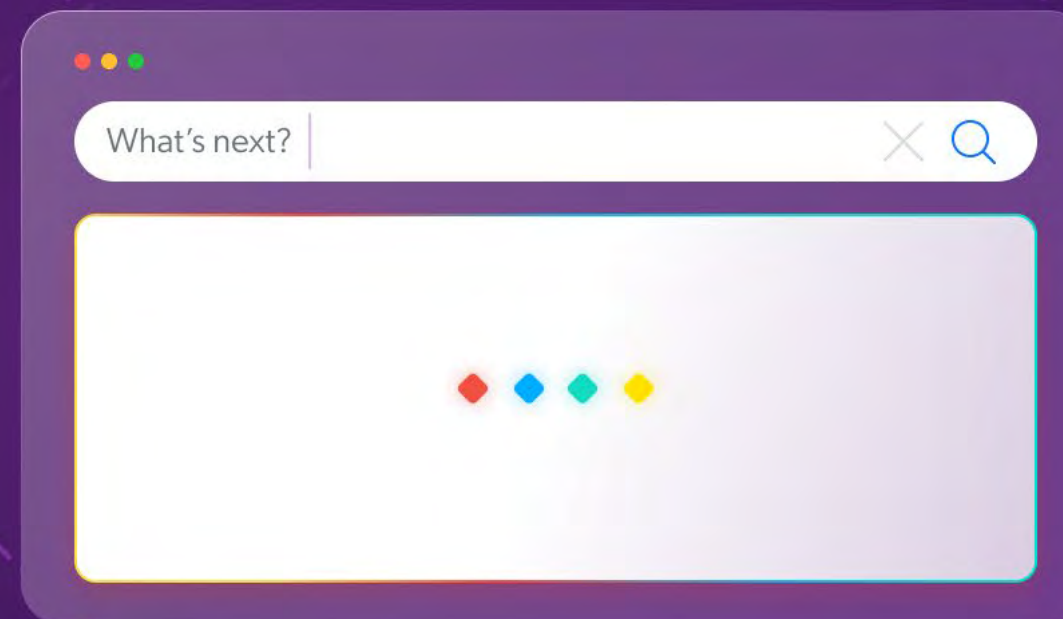
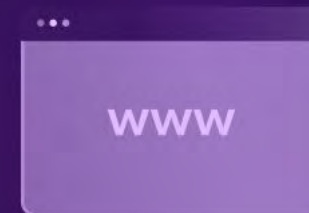




GenAI Survey Report 2023

GenAI: Can Enterprises Catch Up to Expectations?

The hype is real — but so is the technology. Can businesses take a page out of individuals' books to validate the best use case for them? Our survey of 2,000 U.S. adults suggests a path forward.



The Promise of GenAI Isn't Becoming Reality Fast Enough

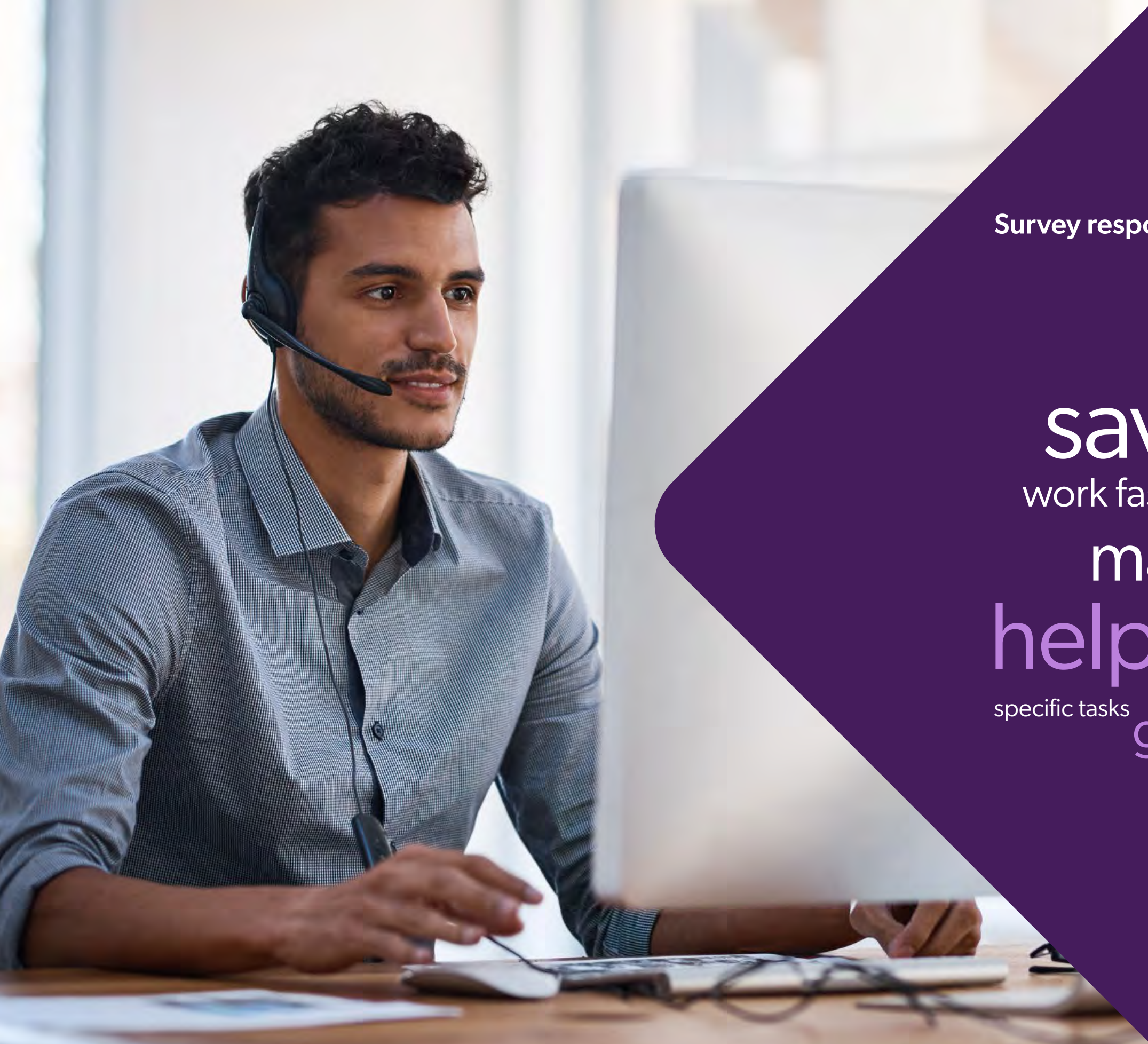
We surveyed 2,000 people working with computers to gain an inside out look at generative AI (GenAI). The findings are provocative — particularly in the context of business conversations happening **with analysts**, on **message boards**, and in social media.

In the first months of 2023, the media hyped ChatGPT with coverage ranging from **fawning** to **fearful**.

But when we examined the results of our survey, we saw that respondents are excited about GenAI, and are taking it upon themselves to find ways to use it.

The companies they work for, however, are still in the early stages of trying to figure their next move — including putting any policies in place.

Unencumbered by bureaucracy or any real risk to themselves, individuals are actively exploring GenAI and looking for answers. Companies, on the other hand, are struggling with a different reality.



Survey responses included...

frequently asked questions
customer support
save time quick and easy answers
work faster information it's the future
make things easier
helpful human good brand work
specific tasks amazing get results time saver
great tool speed wait times
extremely helpful
experience

Exaggeration and Excitement for GenAI Is Real

Overall, we found that almost 90% of respondents had heard of GenAI, with 36% saying they know a fair amount or a lot about it. That number drops slightly with ChatGPT—with 81% saying they had heard of it and 40% saying they know a fair amount or a lot. (We found this interesting as ChatGPT is the “consumer” example of GenAI.)

According to the Columbia Journalism Review, [online media coverage of ChatGPT](#) averaged about 200 articles a day between February and May 2023, while business news TV coverage averaged between 40 and 20 clips a week during the same period.

Given the intense media coverage of ChatGPT in particular, we were surprised that overall, more people said that they had heard of GenAI (86%) rather than OpenAI (85%) or ChatGPT (81%). The hype cycle itself is less surprising than its longevity. ChatGPT has surpassed other technology like deep fakes and VR. Is it because of real-world implications?

Much of that coverage leaned into hyperbole, fear, and scary headlines. What impact are these alarming headlines having?

Apparently, not much. Our respondents are “hyped”—in the excited definition, rather than the exaggeration—about GenAI and its possibilities for the workplace, customer service, and ecommerce. So we asked them, how do you foresee the use of GenAI as a consumer? And they gave us loads of answers and ideas on which use cases are driving the most excitement.



86% of Employees Want GenAI in the Workplace

McKinsey said, “It’s clear that generative AI tools like ChatGPT and DALL-E (a tool for AI-generated art) have the potential to change how a range of jobs are performed. The full scope of that impact, though, is still unknown — as are the risks.”



While those risks may be why companies are struggling with what to do with GenAI, the majority of employees have ideas. Fifty-two percent see GenAI as a great tool to either find more relevant things or create content faster. More than half (56%) believe such tools would save them at least an hour a day at work.

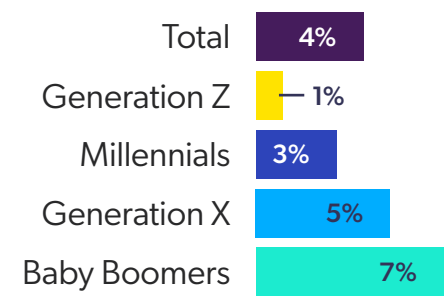
Only 14% overall are worried that GenAI will take their job, which increases to 18% for Gen Z.

Based on what you know about GenAI, how do you think it will most impact your work life? (single choice)

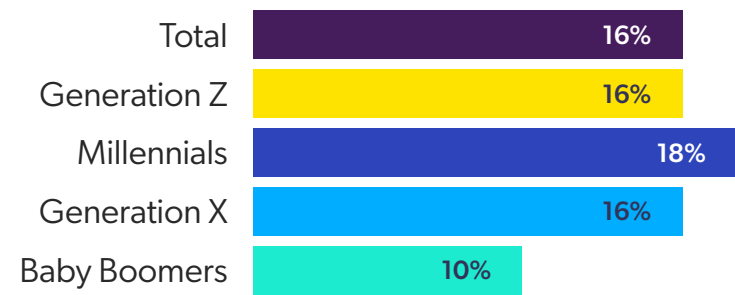
I see it as a great tool to help me find more relevant things faster



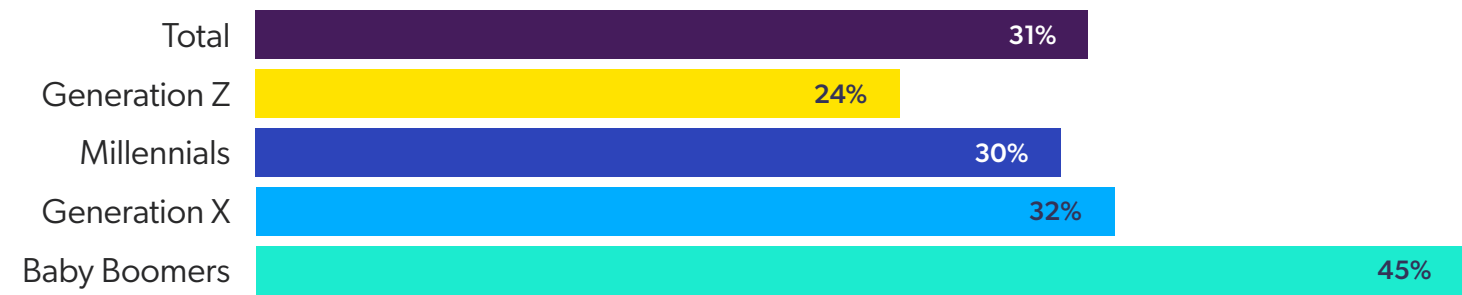
Other



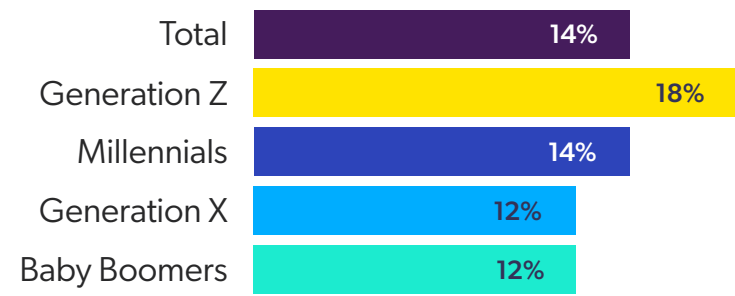
I see it as a great tool to help me create content faster



It won't have any impact

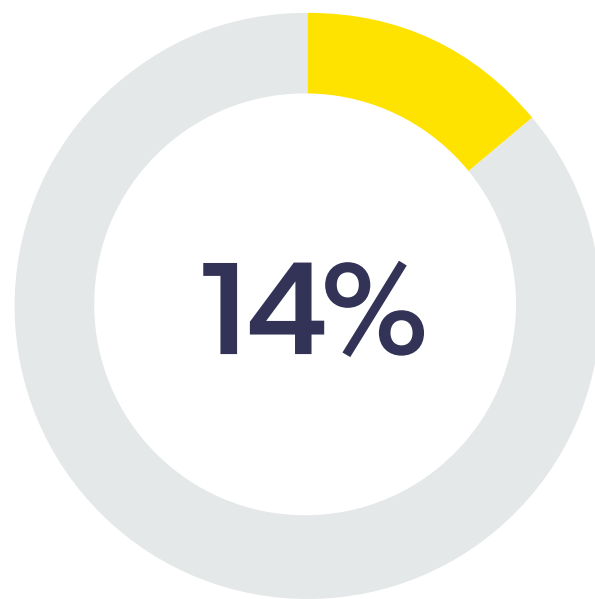


I'm worried it will take my job

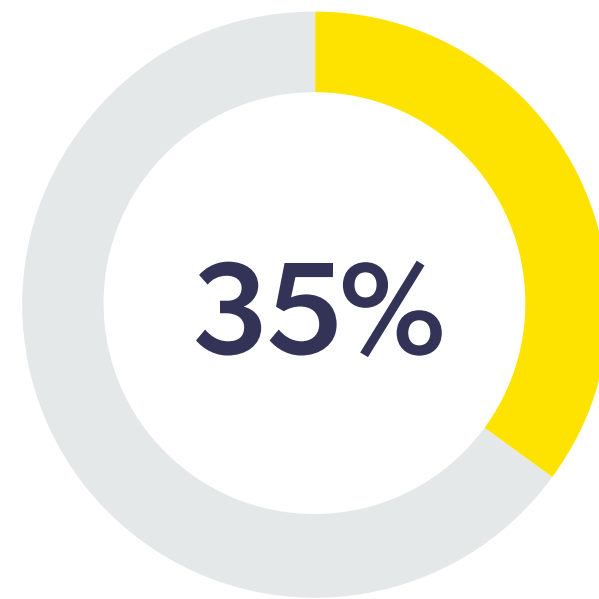


Coveo Guidance

Employee enthusiasm is terrific—if it is harnessed by you. To select a GenAI use case, first acquaint yourself with the technology. Consider forming an advisory group from within your staff. By understanding what the technology can do and is capable of, you'll have an easier time translating potential applications to a business objective.



**are afraid they will
lose their jobs**



**say it will help them
find more relevant
information faster**



Shockingly, More Than Half of Companies Don't Have GenAI Policies

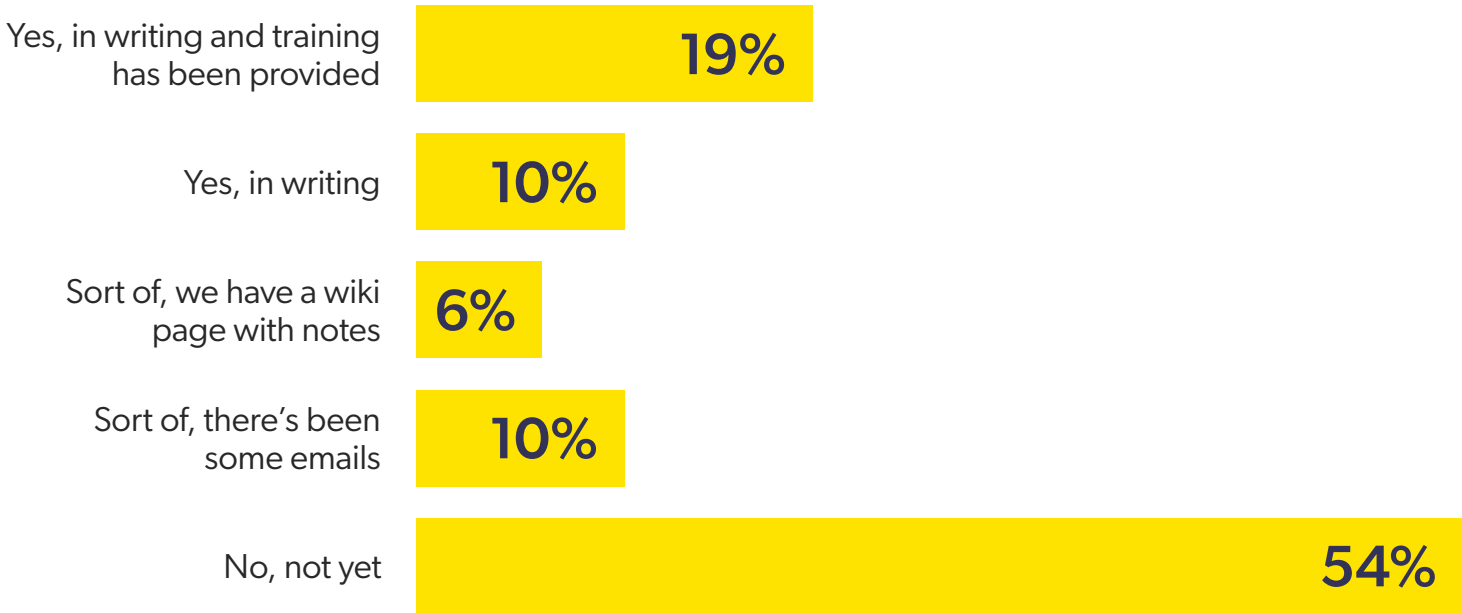
We were surprised that more than half of respondents (54%) say that their companies have not yet rolled out a policy on the use of AI solutions. Only 29% say that their company has a written policy and has provided training on it. Samsung made waves in May 2023 by **restricting use of GenAI** after employees leaked sensitive information to ChatGPT.

When we looked at responses we were a little surprised that more companies weren't following Samsung. But we were shocked that more than half of respondents say they don't have any policy at all.

It is possible that policies exist and that people aren't aware of them — but that, too, is unsettling.

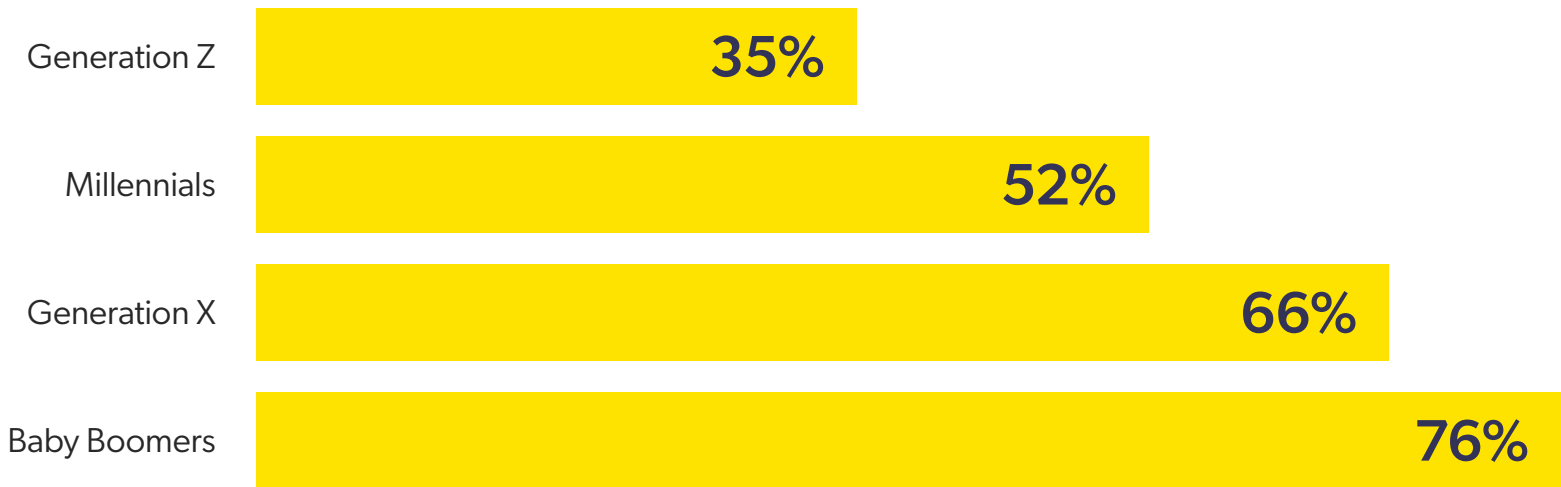
Of those with policies forbidding it, 50% are doing so anyway.

Has your company rolled out a policy on the use of AI solutions?



Interestingly, awareness of such policies changes dramatically by generation with 35% of Gen Z saying that their companies have not rolled out a policy on the use of GenAI tools, followed by Millennials (52%), Gen X (66%), and Boomers (76%).

Employees who say that their companies have not rolled out a policy on the use of GenAI tools



For those companies that do have any policies regarding the use of AI, 16% have forbidden the use of LLMs, with just 12% actively encouraging employees to experiment with ChatGPT.



Coveo Guidance

It’s imperative that companies caution employees against putting any personal information, customer data, confidential information or any sensitive information into a public GenAI tool. Still, don’t throw the baby out with the bathwater. Encourage experimentation by limiting to publicly available information.

Use Cases They Want to See

Though our respondents think that GenAI has the potential to make their work lives easier, we asked them to switch hats and think about what types of applications they would like to see — as consumers. Seventy-nine percent of respondents say they are comfortable using GenAI for customer support or service-related inquiries. While this decreases with age, 64% of Baby Boomers are still comfortable with one or more of these.

Overall we found that many find interacting with current, disconnected self-service channels as customers frustrating. For example, a full 39% say they will use a chat option only if forced by the company, and 7% say they are skeptical of the results. We focused on this channel since it's the use case that made ChatGPT the star it is today.



79%
of respondents are
comfortable using GenAI
for customer support or
service-related inquiries.

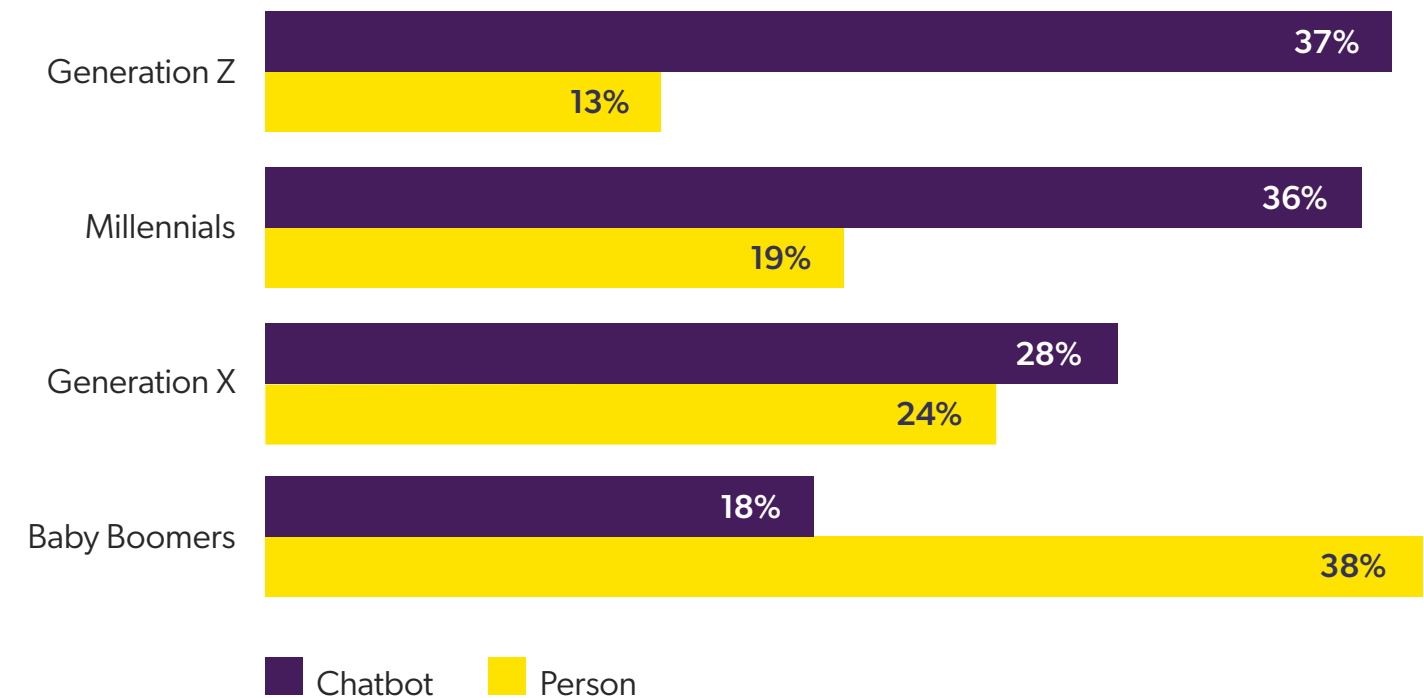
Only 33% prefer chatbots, and 21% prefer talking with a person. Perhaps it is not surprising that these preferences split along generational lines: 37% of Gen Z, 36% of Millennials, 28% of Gen X, and 18% of Boomers prefer chatbots. Those who prefer a person flip generationally: Boomers (38%), Gen X (24%), Millennials (19%), and Gen Z (13%). It's possible any negativity has to do with a mismatch of expectations vs execution.

Our respondents told us that chatbots:

- › often do not fully understand what is being asked;
- › are strictly censored;
- › can't replicate empathy; and
- › have limited knowledge with bad feedback loops.

Much of today's self-service channels have been forced on consumers; we're seeing the exact opposite with GenAI. While phone channels continue to be a large preference for certain demographics, we found that all ages are intrigued by the chat technology — which should help relieve companies reluctant to unleash GenAI on their customers.

Preference for chatbot vs. person by generation



Coveo Guidance

While GenAI is a fantastic addition to the self-service toolkit, it shouldn't be siloed. The best thing you can do to provide a positive customer experience is provide recognition regardless of channel. And interaction data from these channels should be shared to improve the overall experience. For example, website interactions such as chats should be provided to live agents, to avoid making customers repeat themselves.

Almost Half Want GenAI in Their Online Shopping Experiences

Employees are customers, too — and across generations, they have a rising expectation of a good digital experience. Disruptors like Amazon, Netflix, and Uber forever changed the face of bookselling, movie watching, and getting a ride, respectively. When you spend eight hours (or more) a day using the same tools over and over, it's hard not to compare. This leads us to where GenAI can help improve ecommerce.



Overall, 40% would recommend GenAI/chatbots despite their limitations in shopping and customer service contexts, because **human customer service is only going to grow more valuable as it is harder to find.**

Fifty-four percent expect ChatGPT-like technologies to be part of their online shopping experience and to:

- ▶ Help them find products using a conversation (50%)
- ▶ Be a virtual shopping assistant to guide them through finding a gift (49%)
- ▶ Generate a how to guide specific to their buying situations (46%)
- ▶ Help create grocery lists that fit their dietary needs within specific budgets (46%)
- ▶ Provide product descriptions that have been written with their needs in mind (43%)

And 69% expect quick and accurate responses from AI-driven chatbots while 63% want problem-solving assistance.

This aligns with the majority (63%) who said it was important to know whether you are interacting with a human or a GenAI/chatbot during a customer service or shopping interaction.

Consumers Want Carefully Balanced GenAI

From chatbots providing customer service, to finding relevant information on company portals, to finding ethically produced fashion that reflects their individual aesthetic, people want GenAI to work *for* them. This introduces the idea of 'human in the loop,' or a safety net where people are overseeing the experience even as machines take on the heavy lifting.



63% say it is important to know whether they are interacting with a human or a GenAI/chatbot during an interaction.

This might be due to nearly two-thirds being familiar with hallucinations (66%), or the potential for GenAI to create semantically correct text that is factually wrong. Also, 36% say they want transparency on why items are recommended with badges.

Has ChatGPT changed customers' expectations for chatbots? It's hard to say. [This recent study](#) finds people can't tell if they're talking to a person or a chatbot 32% of the time. But that test was under specific conditions. What we do know is that some customers ([this researcher says 96%](#)) will leave your business for good if they can't get what they need from your service channels.



Coveo Guidance

Consider retrieval-augmented generation (RAG) techniques when designing generative experiences on an enterprise scale. This approach improves the quality of generated answers by coupling your LLM with a precision retrieval method, enabling you to deliver refined experiences that better understand user intent. In addition, let searchers rate the quality of generated responses with a thumbs up or a thumbs down. This information can be captured in search logs that can be analyzed to evaluate gaps.

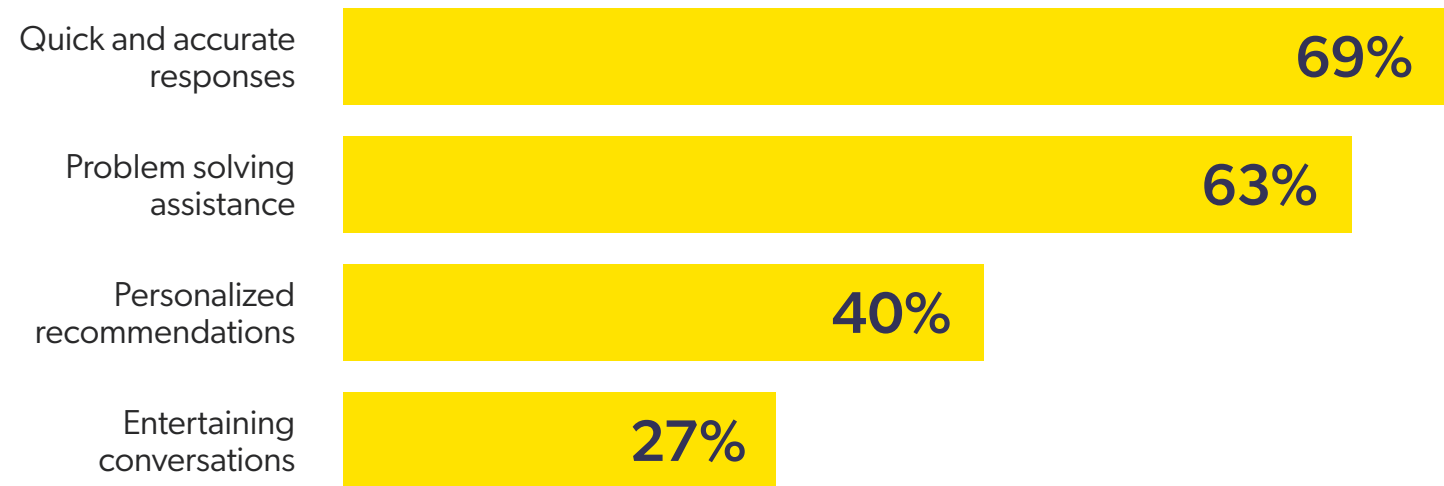
People Want Secure and Accurate GenAI

Perhaps the desire for a human in the loop arises from a distrust of AI. But here, too, our survey results are somewhat contradictory.

Overall, 40% of respondents say they would recommend GenAI, and most of the comments were about time-saving potential. When asked what expectations they have for interacting with GenAI, 69% cite quick and accurate responses, 63% problem solving assistance, 40% personalized recommendations, and 27% said entertaining conversations.

But a whopping 93% said they have concerns about using GenAI chatbots, with 62% citing data privacy as their top concern, followed by 56% who are worried about the accuracy and reliability of answers.

What are your expectations for interacting with GenAI?



What are your main concerns about using GenAI chatbots?



73%
of respondents
say that the
accuracy of results
is paramount.

To recap that:

Almost all are concerned about using it, but 40% of respondents would recommend GenAI anyway. And, importantly, though 69% want quick and accurate responses, 56% of them realize they're not likely to get them. What's more, when we asked respondents to think about current or future use of GenAI, 73% say that accuracy of results is paramount.

This begs the questions:

- › Are users willing to wade through inaccurate responses in the hopes of saving time?
- › Are they expecting a human in the loop to overcome this?
- › Or does this indicate a hope for the future of GenAI?

It seems as if it's a combination. About half (53%) of respondents said that knowing the generated content is pulled from a secure source and 48% said having a person available as backup would make them more likely to use GenAI.

Coveo Guidance

To assuage fears about accuracy and hallucinations, your solution must consider each user's access rights and only generate answers they have access to. This requires secure content retrieval to ensure that your GenAI's output is relevant, accurate, and consistent.



GenAI's Time Has Come

We found plenty of seeming contradictions in this report. More people have heard of GenAI than ChatGPT. People think GenAI will save them time, but they don't trust it. Many bring a learned caution to parsing the answers they get from GenAI while still leaning into the services GenAI can provide. We know from [previous research](#) that shoppers and employees are overwhelmed with (often bad) choices and are weary of sorting through search results.

Still, we think that these answers indicate a hope for the future of GenAI and its ability to make life a little easier. Given our findings, we also feel organizations should feel positive that GenAI applications will be adopted.

This leads us to speculate that companies who embrace GenAI that they can have input into will pull away from their competitors, simply by offering what we, as a society, feel we've lost: Answers without selling our private selves to get them.

Research Methodology

Arlington Research conducted this survey of 2,000 adults on behalf of Coveo between July 1–10, 2023. Respondents were all in the United States and work in companies with 500 or more employees.

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