

**Deloitte.**

# Trust in generative AI

A Dutch perspective

October 2024



# Research scope

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# Trust in generative AI research - research overview



## Research aim:

- To assess levels of trust in GenAI and readiness to use GenAI tools among consumers and employees

## Impact:

- To build Deloitte's reputation and eminence around the topic of Trust and AI
- To support initiatives around Trustworthy AI
- To support client conversations around GenAI

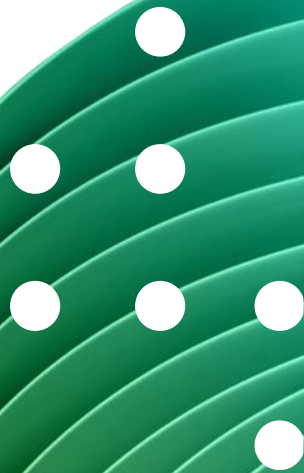
## Methodology:

- Nationally representative survey of 2,760 Dutch consumers and employees
- Part of a wider survey of 30,000 respondents across 11 European markets

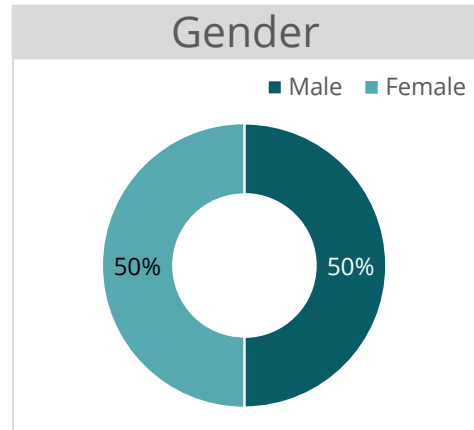


# Key findings

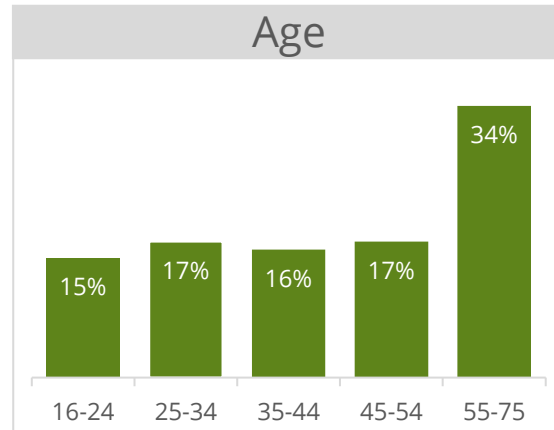
Dutch data



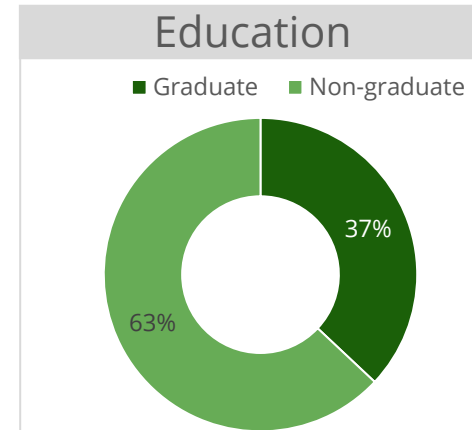
# Demographics – Netherlands sample (N=2,760)



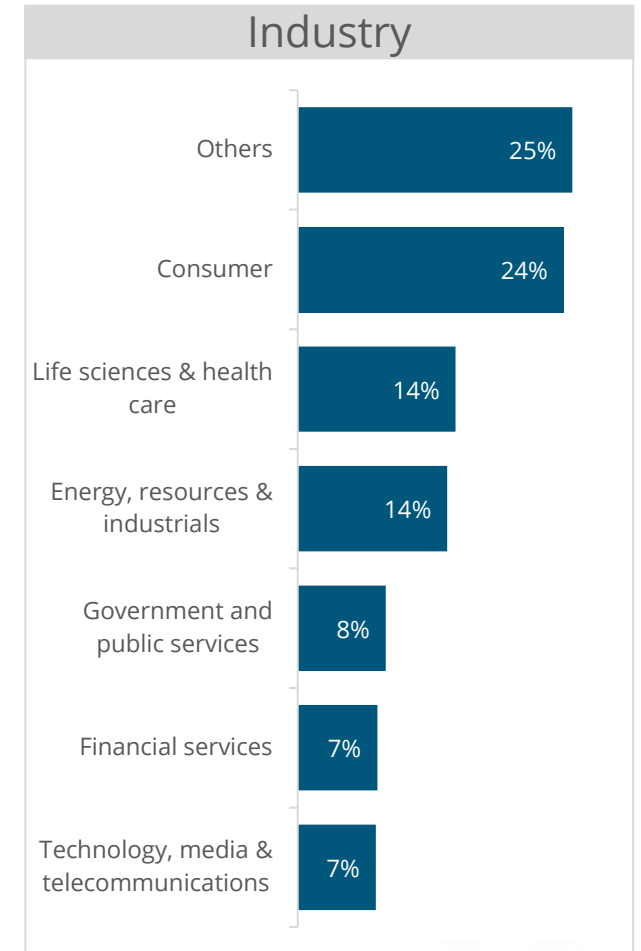
(N = 2,760)



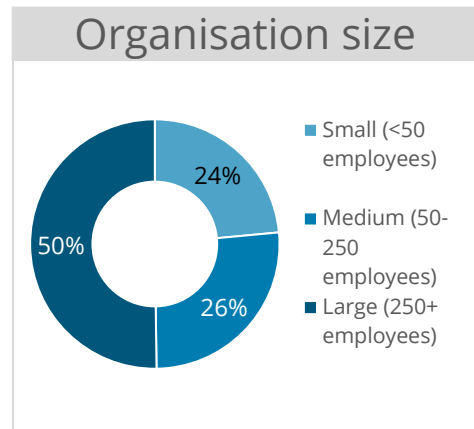
(N = 2,760)



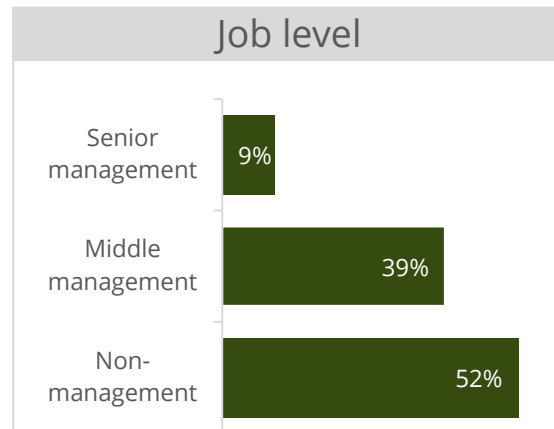
(N = 2,760)



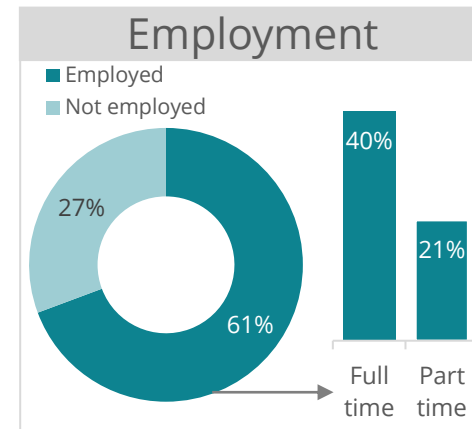
(N = 1,662)



(N = 1,599)



(N = 1,492)



(N = 2,445)

(N = 1,694)



# Consumer perspective



## Setting the scene: GenAI awareness, use, frequency and confidence

Base: All Dutch respondents (N = 2,760)

### Awareness:

- **ChatGPT** is the **most widely recognised tool** (60% of Dutch respondents have heard of ChatGPT)
- **35%** of respondents are **not aware of any GenAI tools**

Base: Respondents aware and use GenAI tools (N = 1,171)

### Type of use: Of those respondents who are aware and have used any GenAI tools:

- **71%** have used GenAI for **personal activities**
- **42%** have used GenAI for **work activities**

Base: Respondents aware and use GenAI tools for : personal use (N = 837) | work use (N = 496)

### Top uses:

- **Personal:** generating ideas (45%), general search / looking-up information (41%),
- **Work:** generating ideas (45%), summarizing text (43%)

Base: Respondents aware and use GenAI tools for : personal use (N = 837) | work use (N = 496)

### Frequency of use:

- **A third of respondents use GenAI at least once a week** for both personal (32%) and work purposes (35%)

Base: Respondents aware and use GenAI tools (N = 1,171)

### Confidence:

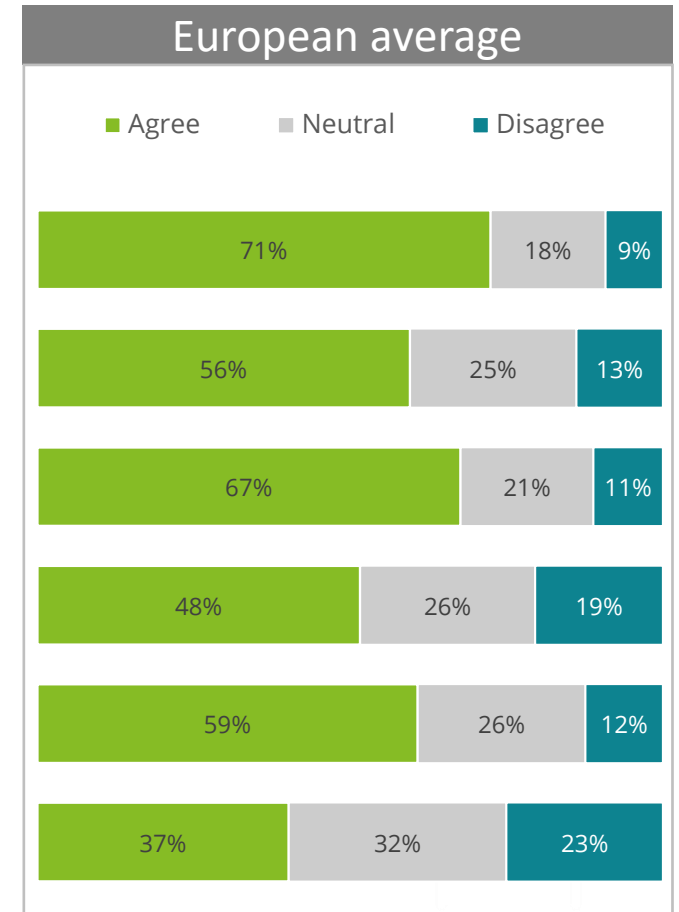
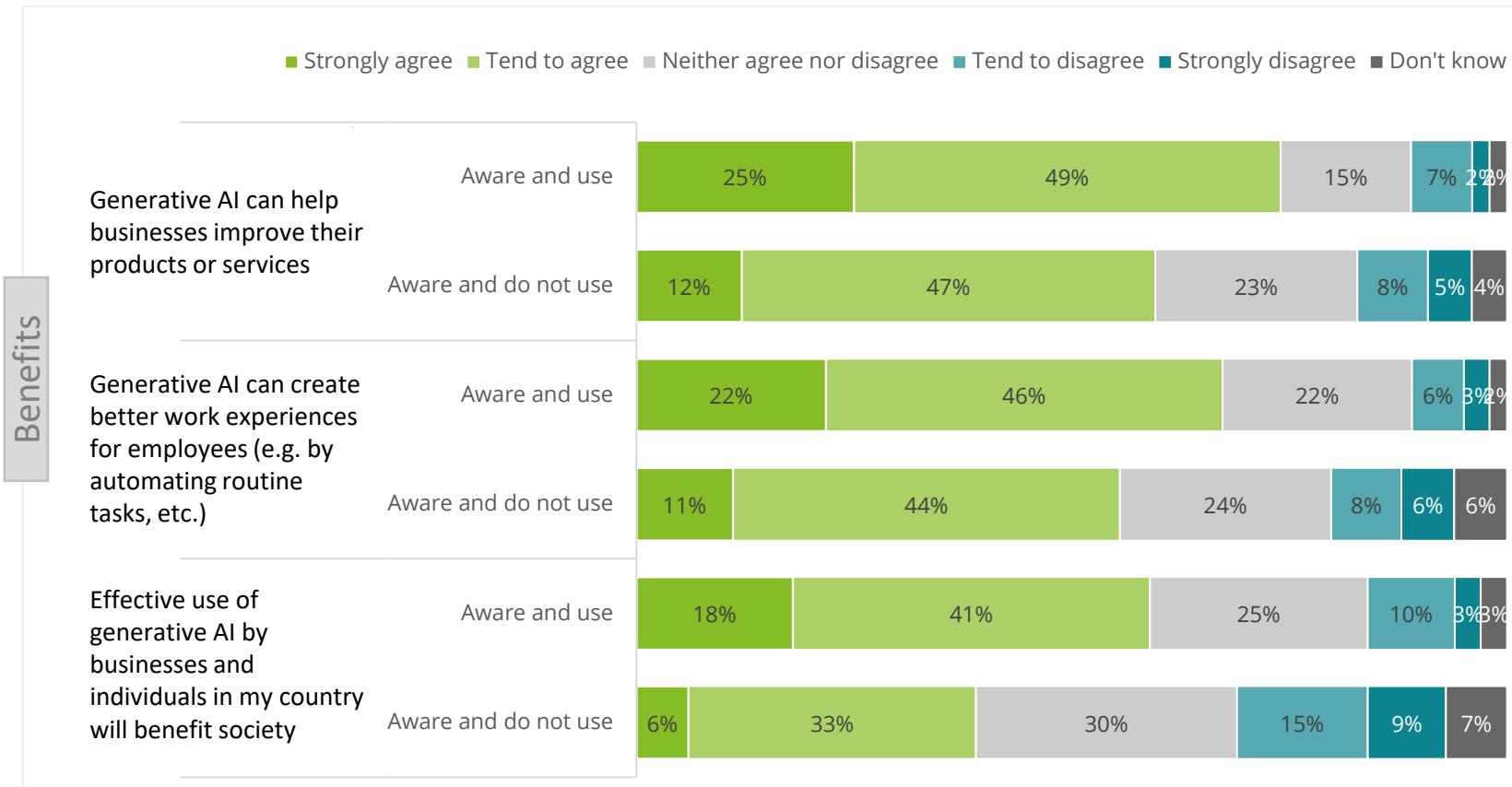
- **74%** of respondents say they are **confident in using GenAI** (with 18% saying they are very confident)

## Trust in generative AI

The majority of Dutch respondents who are aware and use GenAI agree that it can enhance business products, create better work experiences and benefit society

Base: Aware and use GenAI (N = 1,171) | Aware and do not use GenAI (N = 624)

Q7. To what extent do you agree, or disagree, with each of the following statements?



Benefits

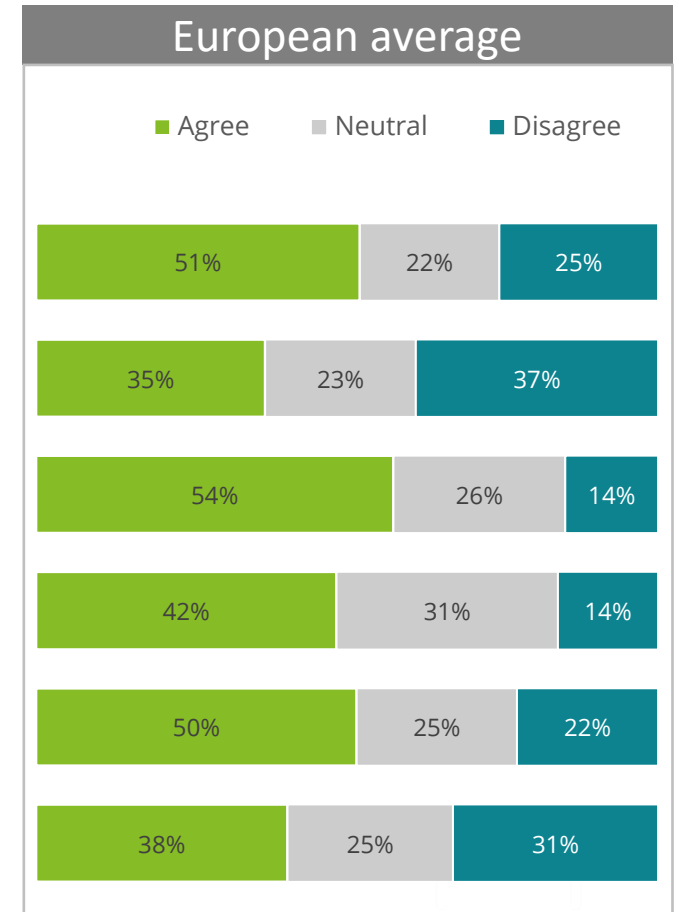
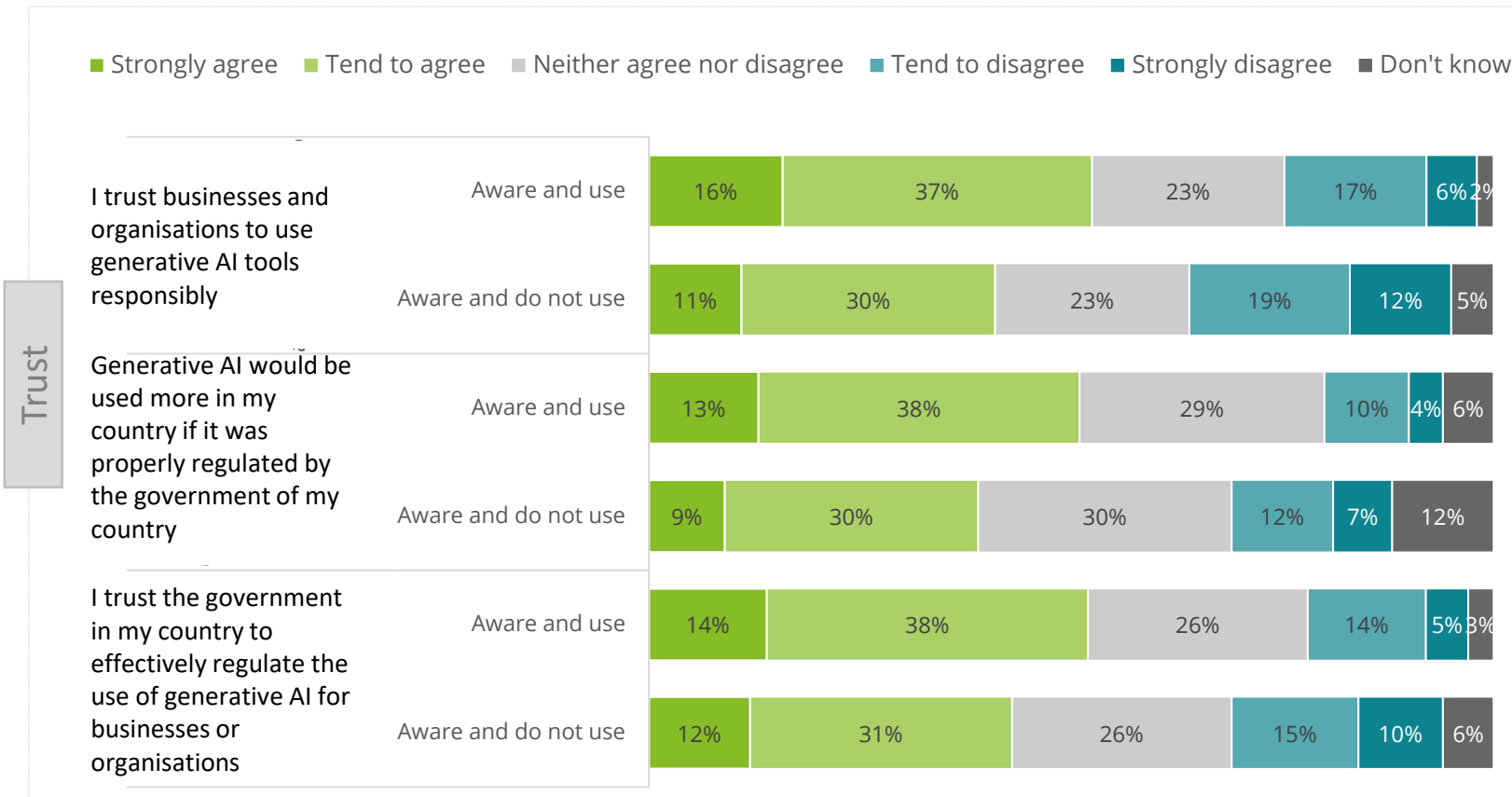


## Trust in generative AI

Over half of generative AI users believe its usage would rise with government regulation and a similar percentage trust both businesses and the government to handle it responsibly

Base: Aware and use GenAI (N = 1,171) | Aware and do not use GenAI (N = 624)

Q7. To what extent do you agree, or disagree, with each of the following statements?



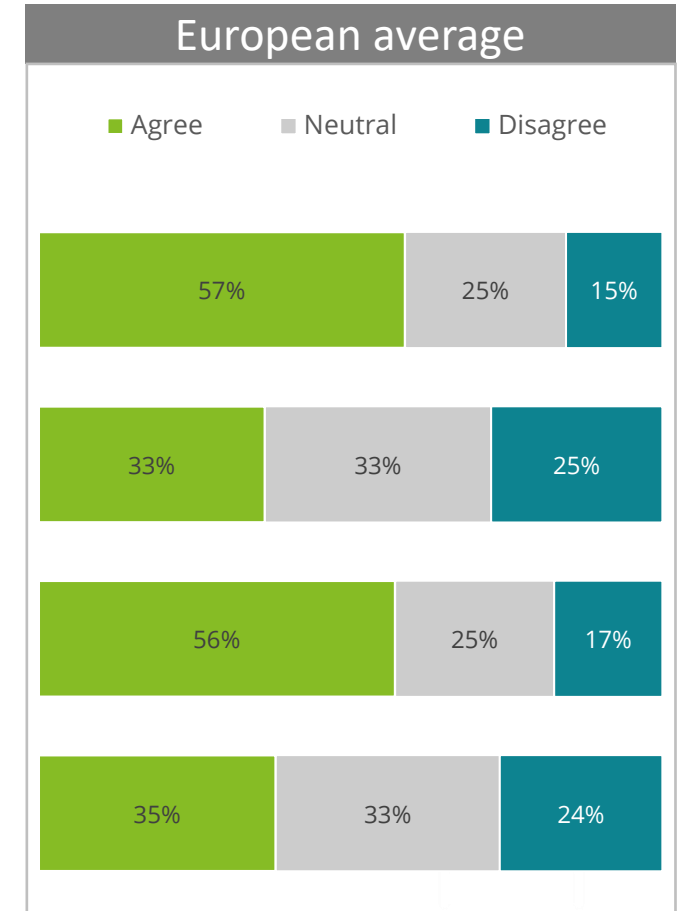
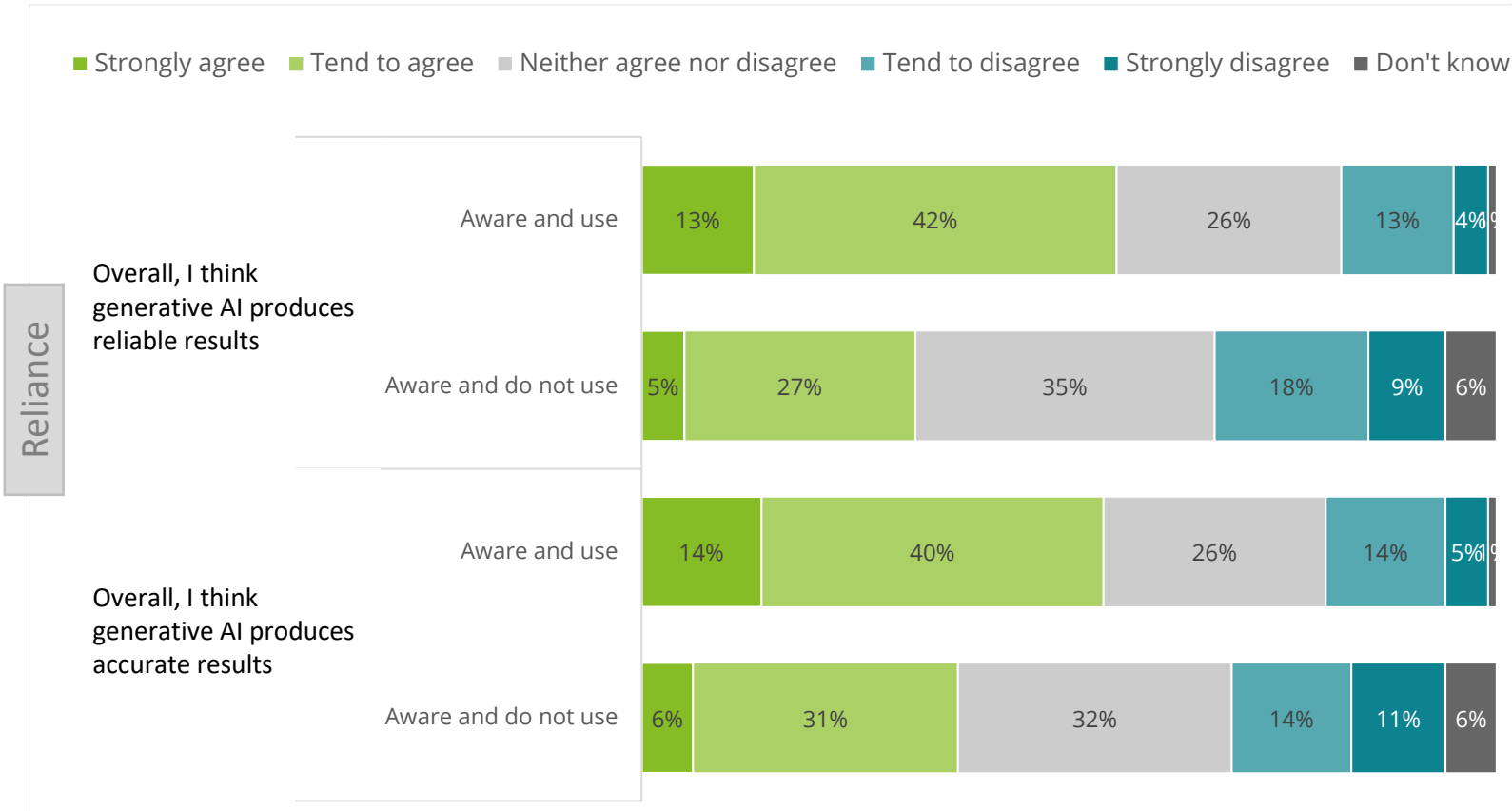
Trust

## Trust in generative AI

# More than half of generative AI users agree that it produces reliable and accurate results

Base: Aware and use GenAI (N = 1,171) | Aware and do not use GenAI (N = 624)

Q7. To what extent do you agree, or disagree, with each of the following statements?



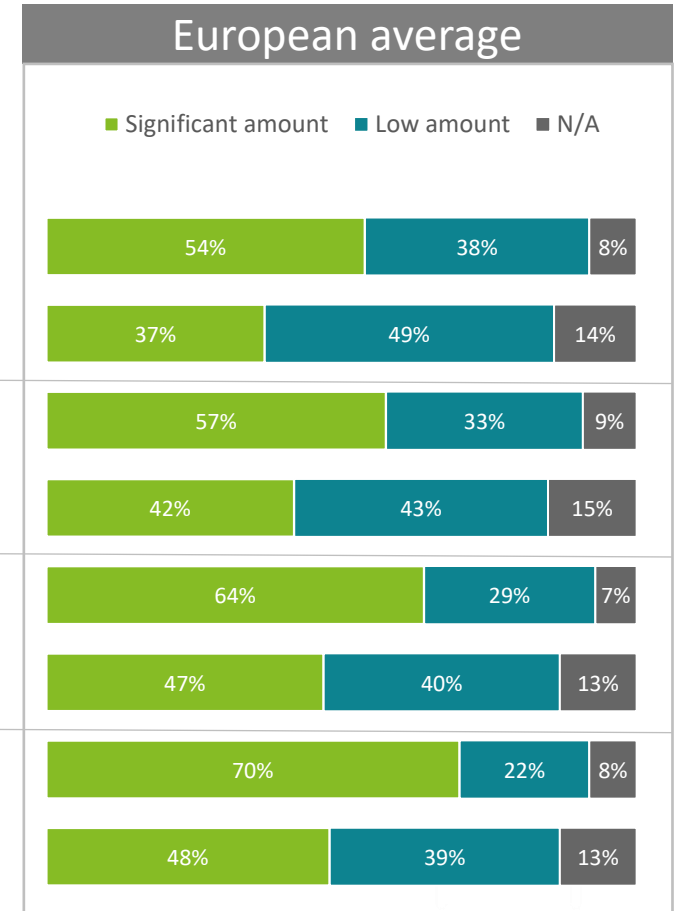
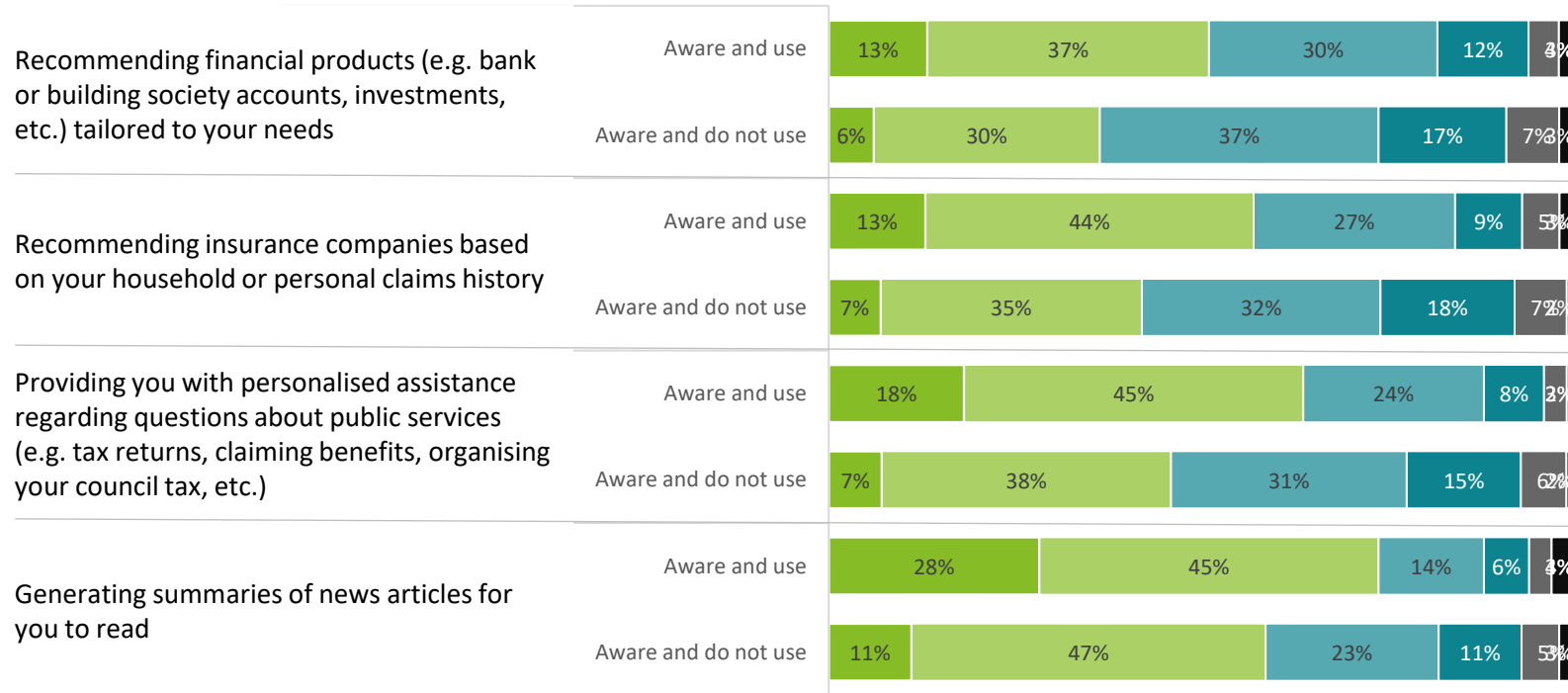


## Trust in generative AI for specific **personal use** scenarios

More than half of respondents who use generative AI trust its results for personal (lower-risk) use cases

Base: Aware and use GenAI (N = 1,171) | Aware and do not use GenAI (N = 624)  
 Q10a. Now thinking about how you could personally use generative AI for different purposes. To what extent would you personally trust the results produced by generative AI in each of the following scenarios?

■ A great deal ■ A fair amount ■ Not very much ■ Not at all ■ Don't know ■ Not applicable

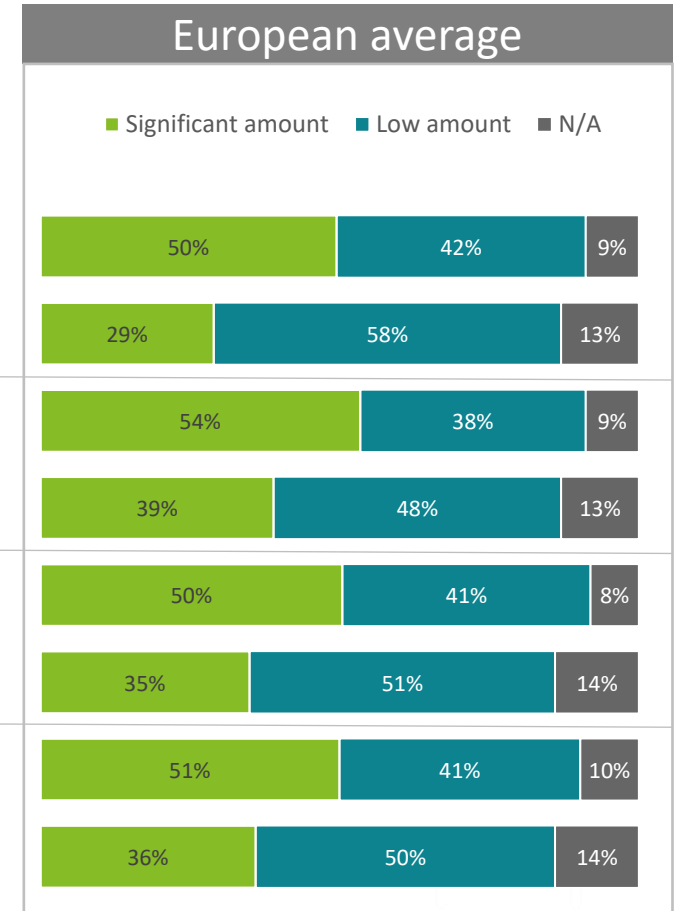
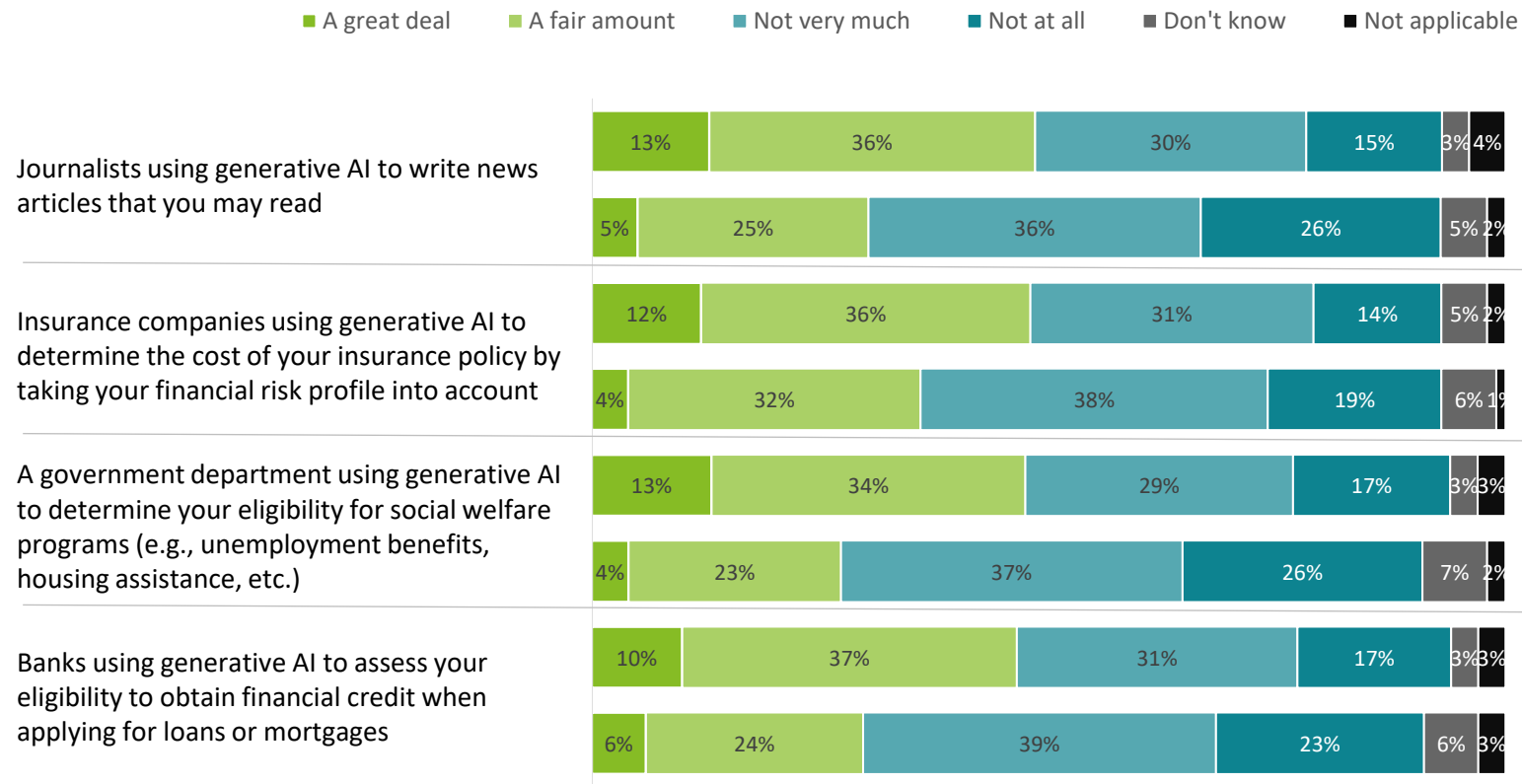


## Trust in generative AI for specific business use scenarios

Generative AI users trust its results for business (higher-risk) use cases to a lower extent than personal use cases

Base: Aware and use GenAI (N = 1,171) | Aware and do not use GenAI (N = 624)

Q10b. Now thinking about how businesses and organisations could potentially use generative AI. to what extent, if at all, would you personally trust the results produced by generative AI in each of the following scenarios?



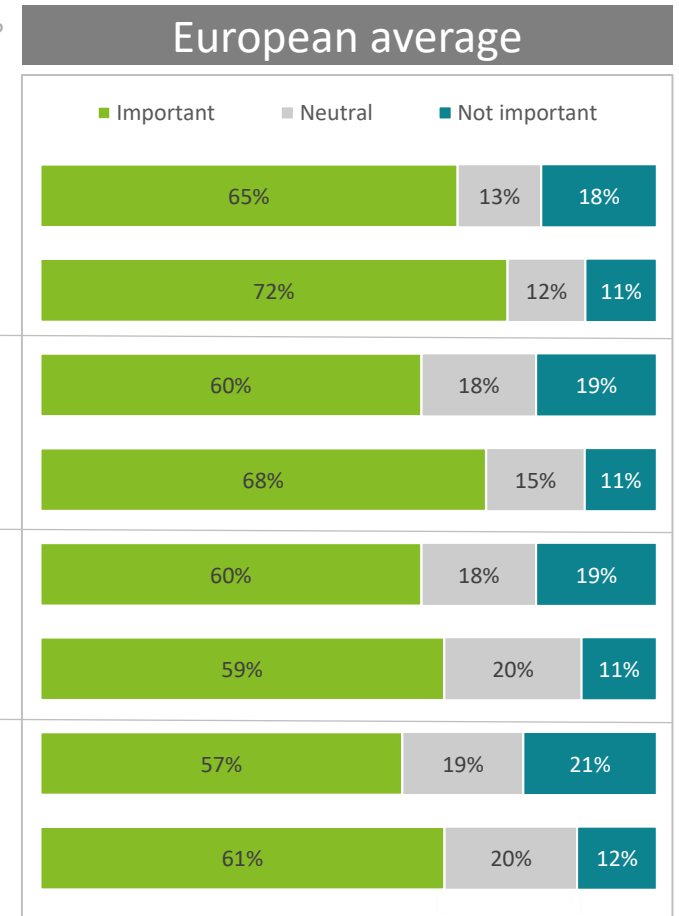
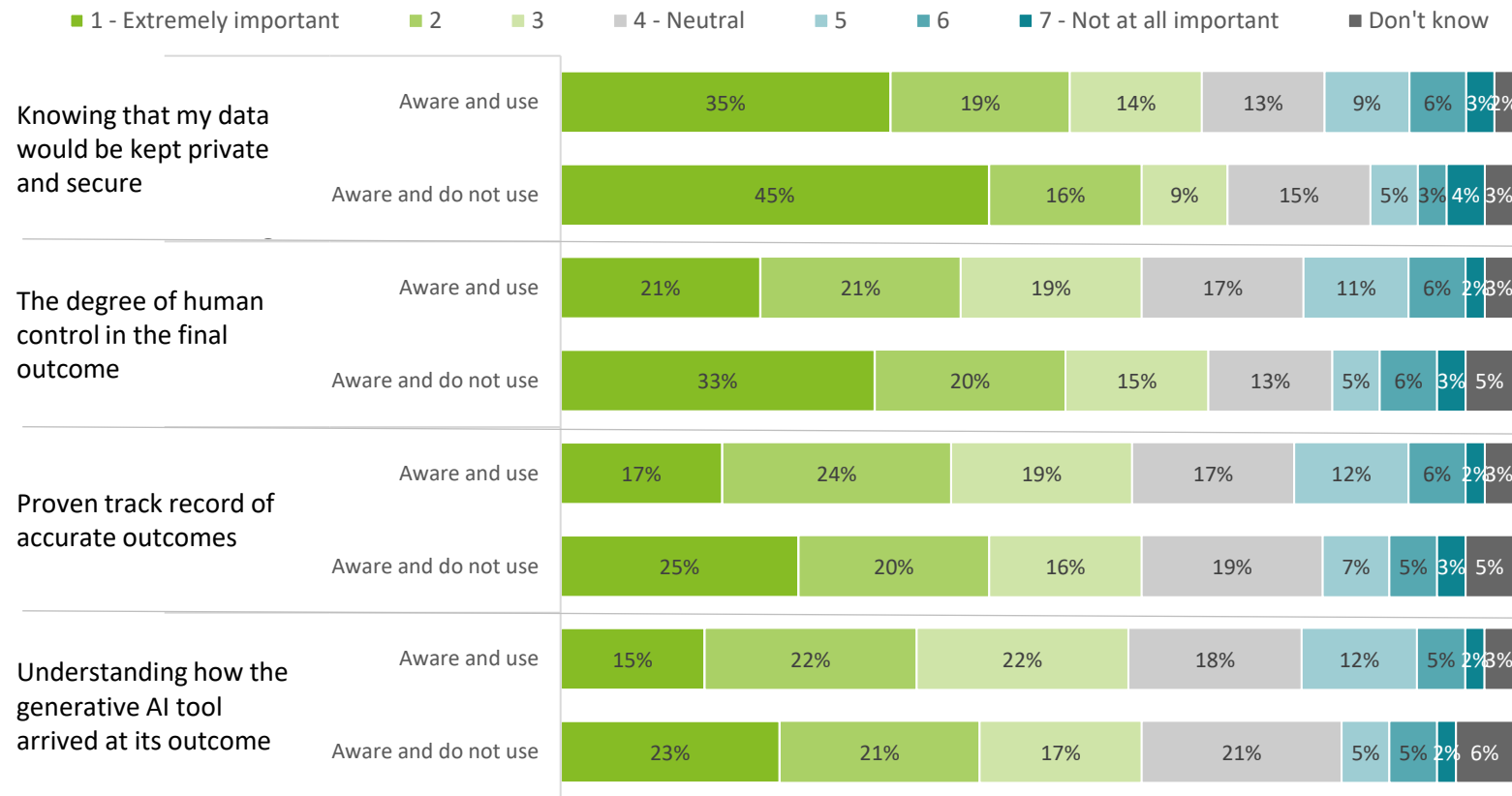


## Concerns about generative AI use personally

# Data privacy and security are crucial for building trust in GenAI

Base: Aware and use GenAI (N = 1,171) | Aware and do not use GenAI (N = 624)

Q11. How important, or not, would each of the following factors be to you personally, when deciding whether to trust generative AI?

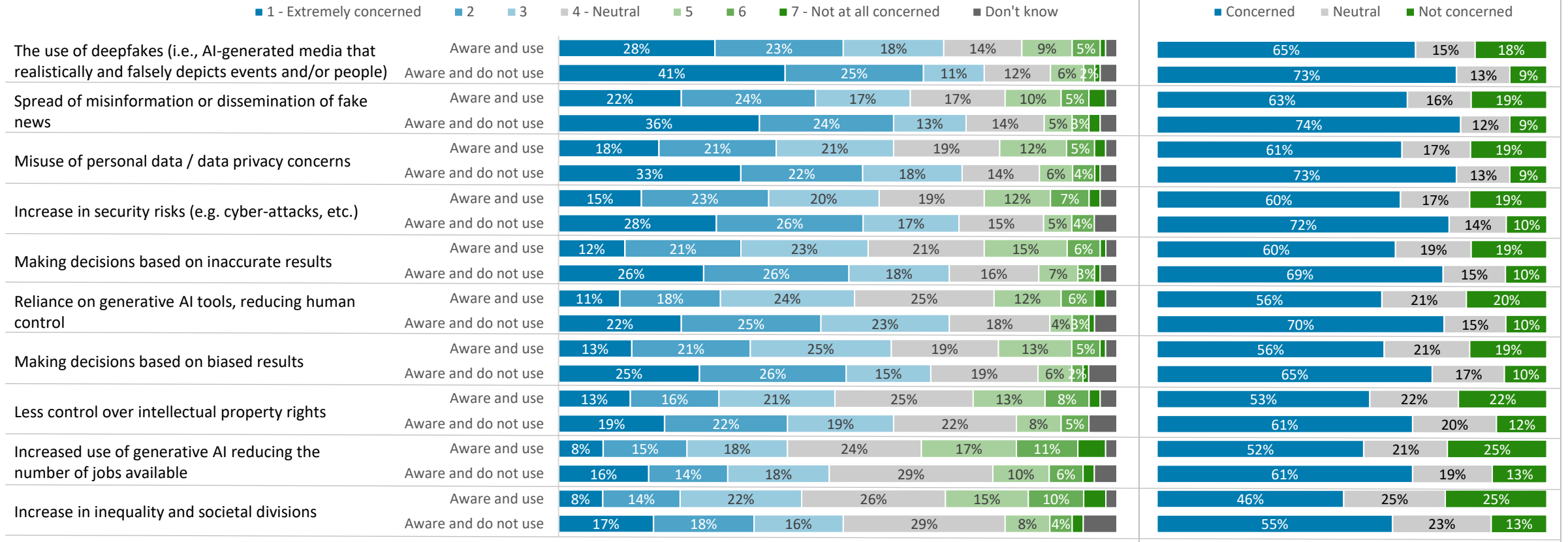


## Concerns about generative AI use

Respondents are concerned about GenAI risks like deepfakes, misinformation, and security, with non-users being more worried than users of Gen AI

Base: Aware and use GenAI (N = 1,171) | Aware and do not use GenAI (N = 624)

Q14. When thinking about the potential impact of generative AI on our society, how concerned, or not, are you about each of the following?





# Employee perspective



Base: All employed and who have used a GenAI tool for work purposes

**Setting the scene:** Organisational policy on generative AI, adoption patterns, investment strategies, and training & satisfaction for work-related use

Base: Employed and used GenAI for work purposes (N = 403)

### **Organisational policy on generative AI:**

- **35%** of respondents say their **company promotes generative AI use** at work
- **29%** state their company **allows but doesn't promote generative AI use**
- **21%** report their **company has no formal policy on workplace generative AI use**

Base: Employed and used GenAI for work purposes (N = 403)

### **Adoption patterns and investment strategies for generative AI tools:**

- **Half (51%)** of respondents use **free external GenAI tools**
- **One-third (33%)** respondents **access GenAI tools through organisation-funded accounts**
- **Nearly one-fifth (18%)** respondents use GenAI tools owned by another company that they access with an account **paid for personally** and a same proportion (18%) use **tools developed in-house** or by **third-party developers**

Base: Employed and used a company GenAI tool (N = 177)

### **Training and satisfaction on generative AI for work purposes:**

- Among employees who use GenAI tools **developed in-house** or **funded by their organisation** for work purposes:
  - **38%** report their organisation provides **hands-on workshops, webinars or demos**
  - **36%** are provided with **training focused on the ethical and responsible use** of GenAI tools
  - **35%** receive **practical advice on integrating GenAI tools** into their work processes

Base: Employed and received training on company's GenAI tools (N = 140)

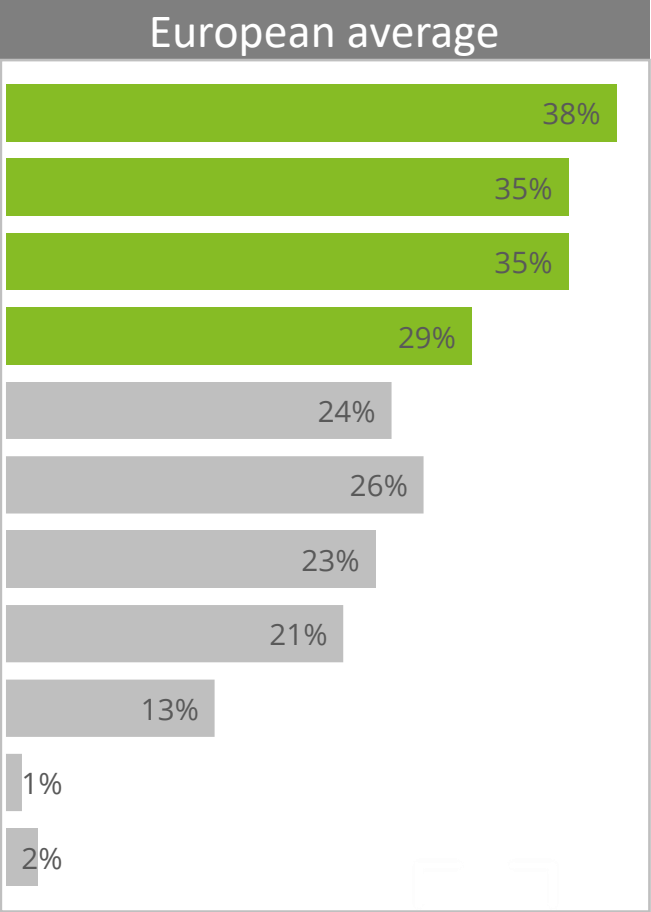
- Among **employees with GenAI training access**, **75% are very satisfied** with the training quality.

### Top benefits of using generative AI for work purposes

Significant improvements in efficiency, quality, and innovation are the top three benefits perceived by employees using generative AI at work

Base: Aware and use GenAI for work purposes (N = 403)

Q19. Which two or three of the following, if any, do you personally think are benefits of using generative AI tools for work purposes?

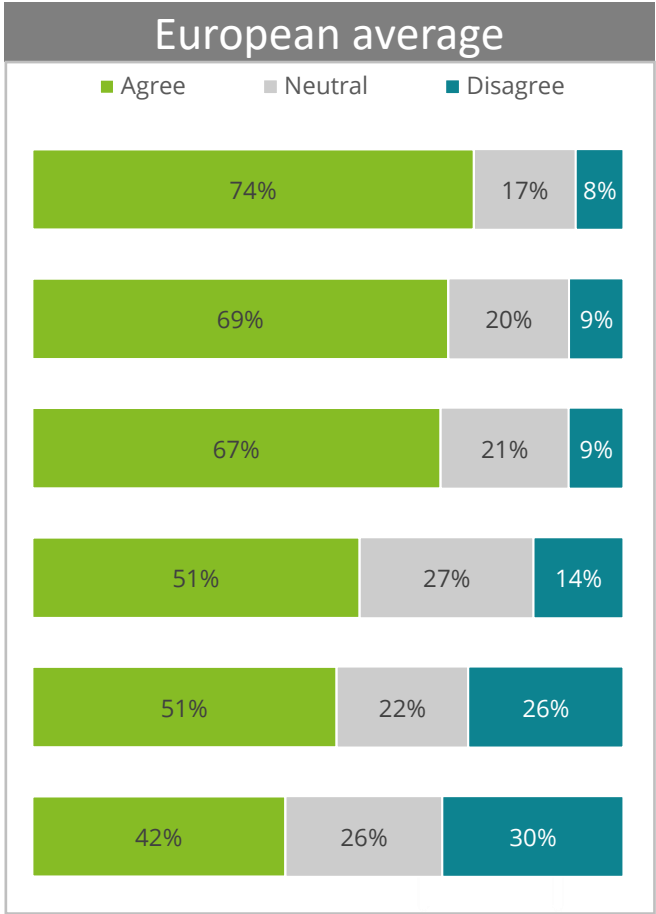
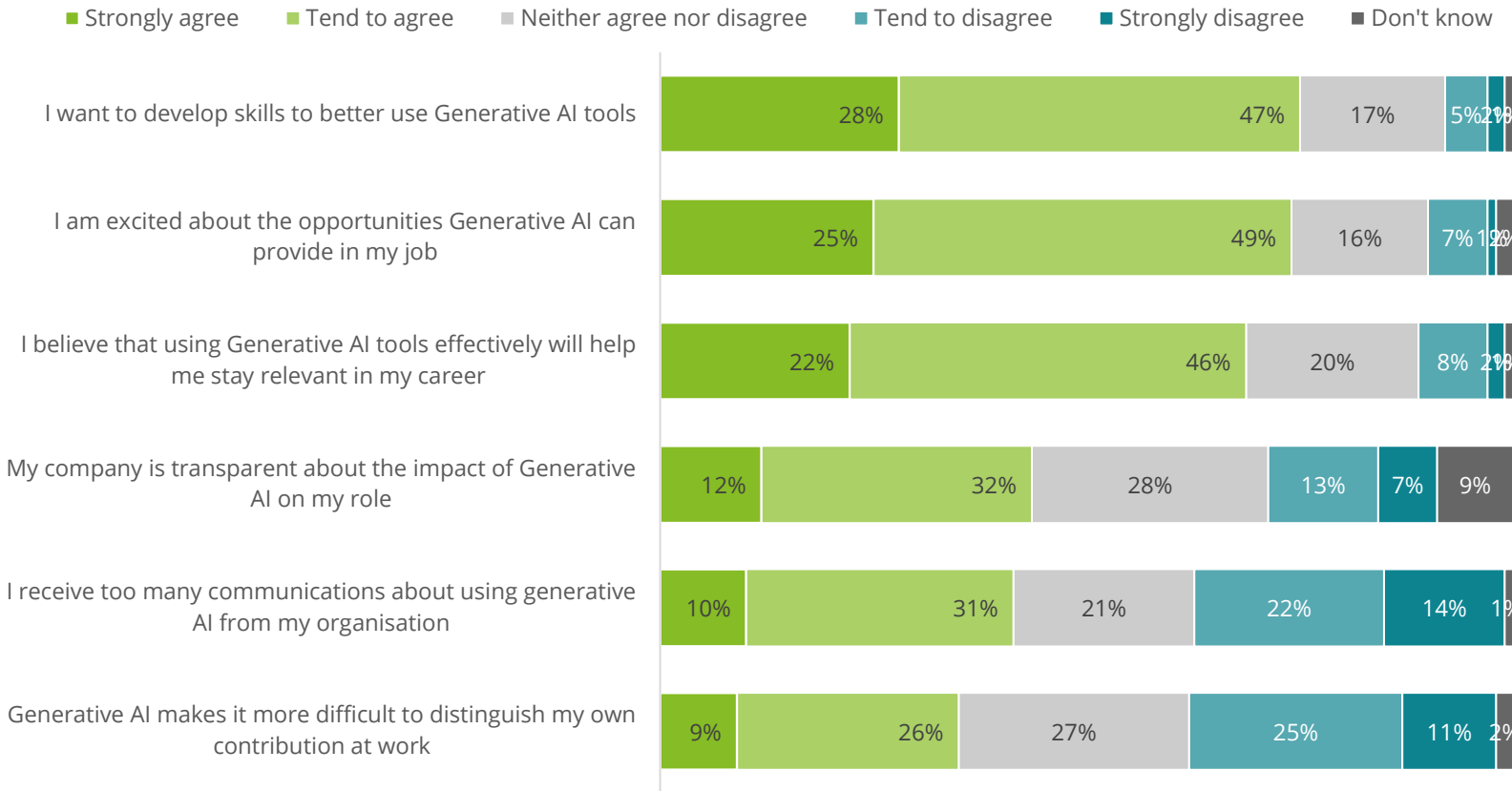




### Agreement with generative AI statements

Among employees using GenAI tools, nearly two-third actively leverage them for skill development, career sustainability, and new job opportunities

Base: Aware and use GenAI for work purposes (N = 403)  
 Q20. To what extent do you agree, or disagree, with each of the following statements?

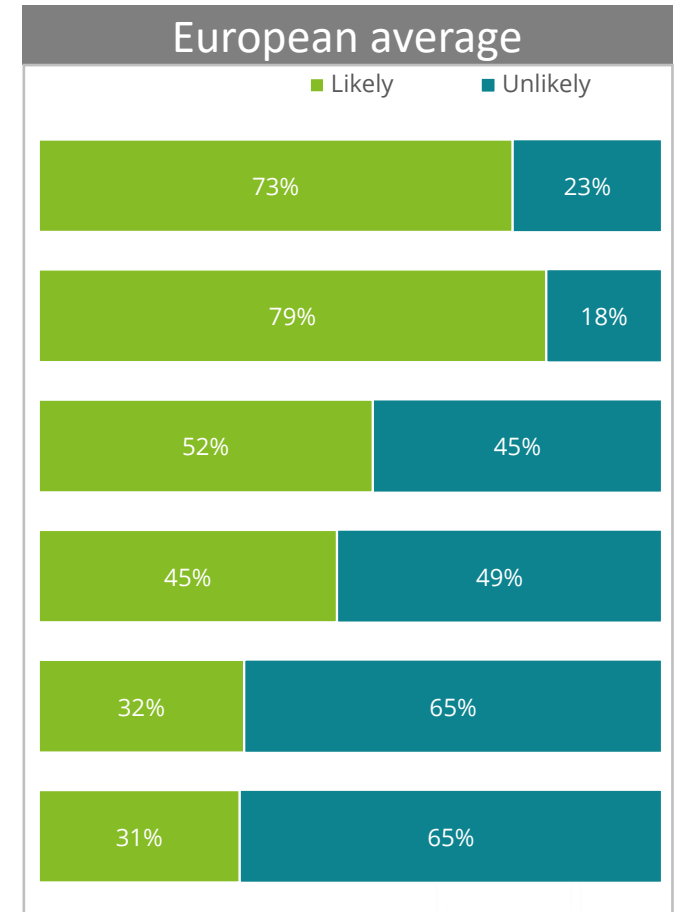
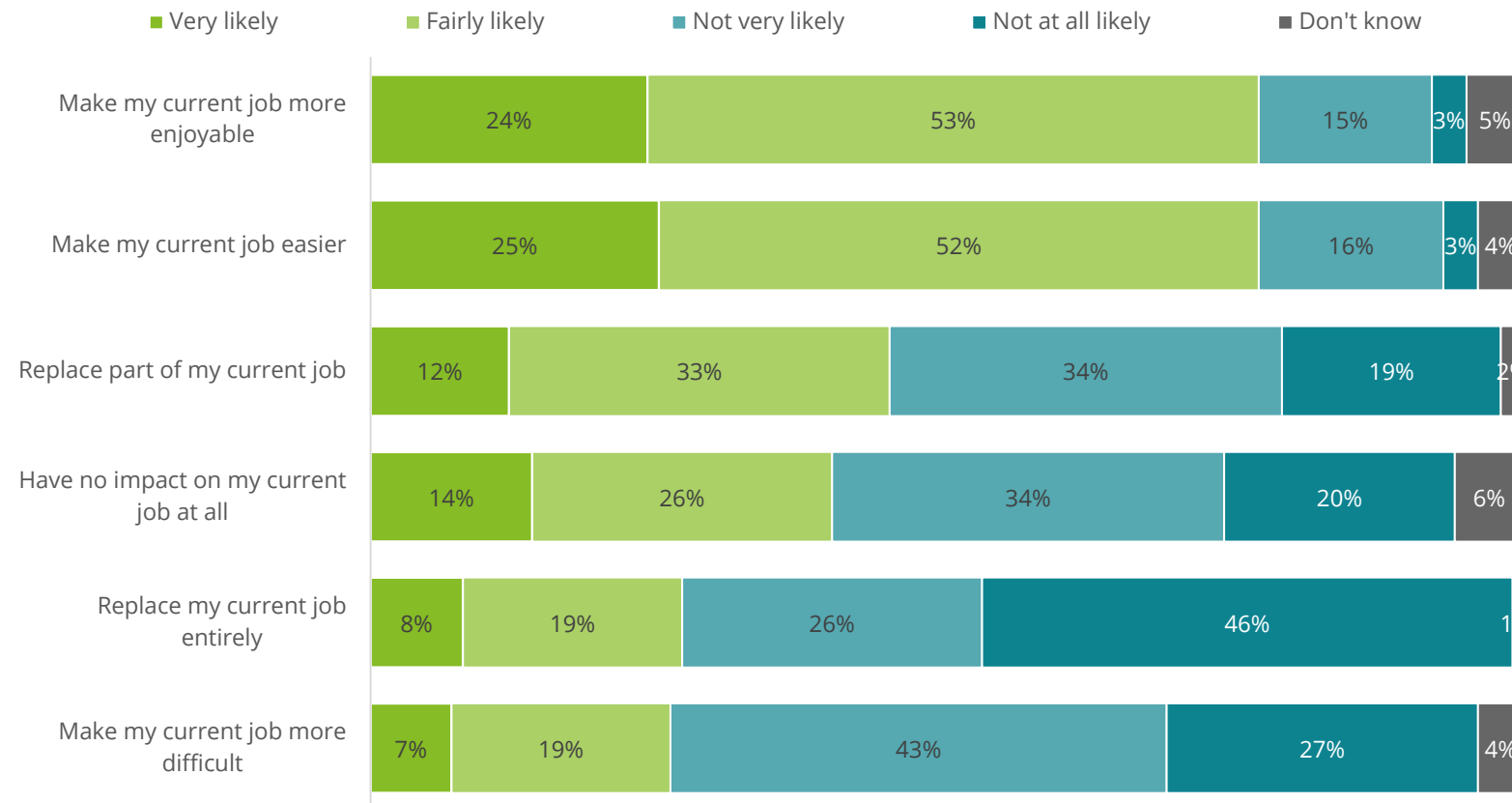


## Impact of generative AI in next 2 years

Most GenAI users believe that in the next two years, GenAI will make their jobs easier (77%) and more enjoyable (77%)

Base: Aware and use GenAI for work purposes (N = 403)

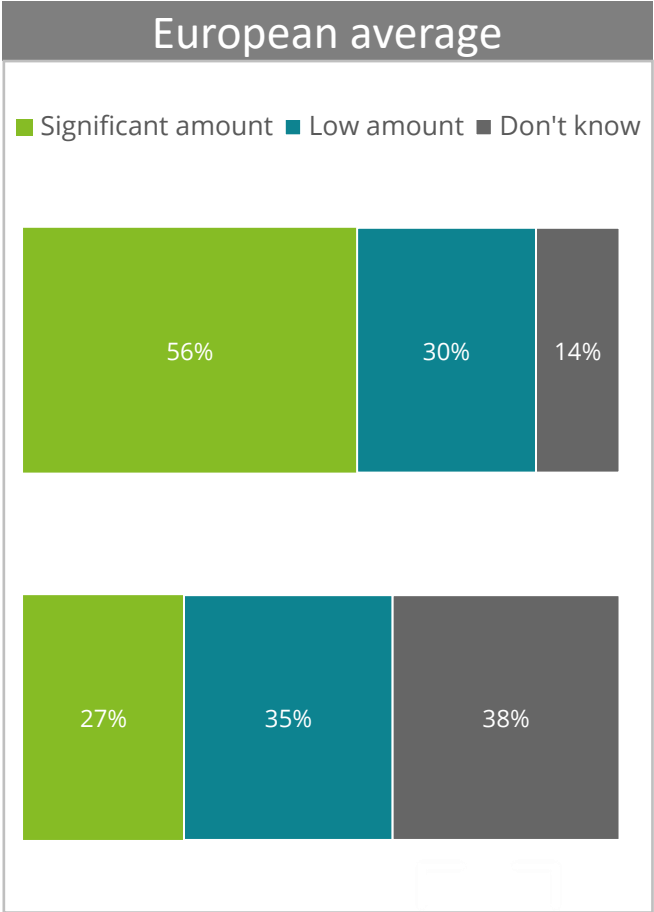
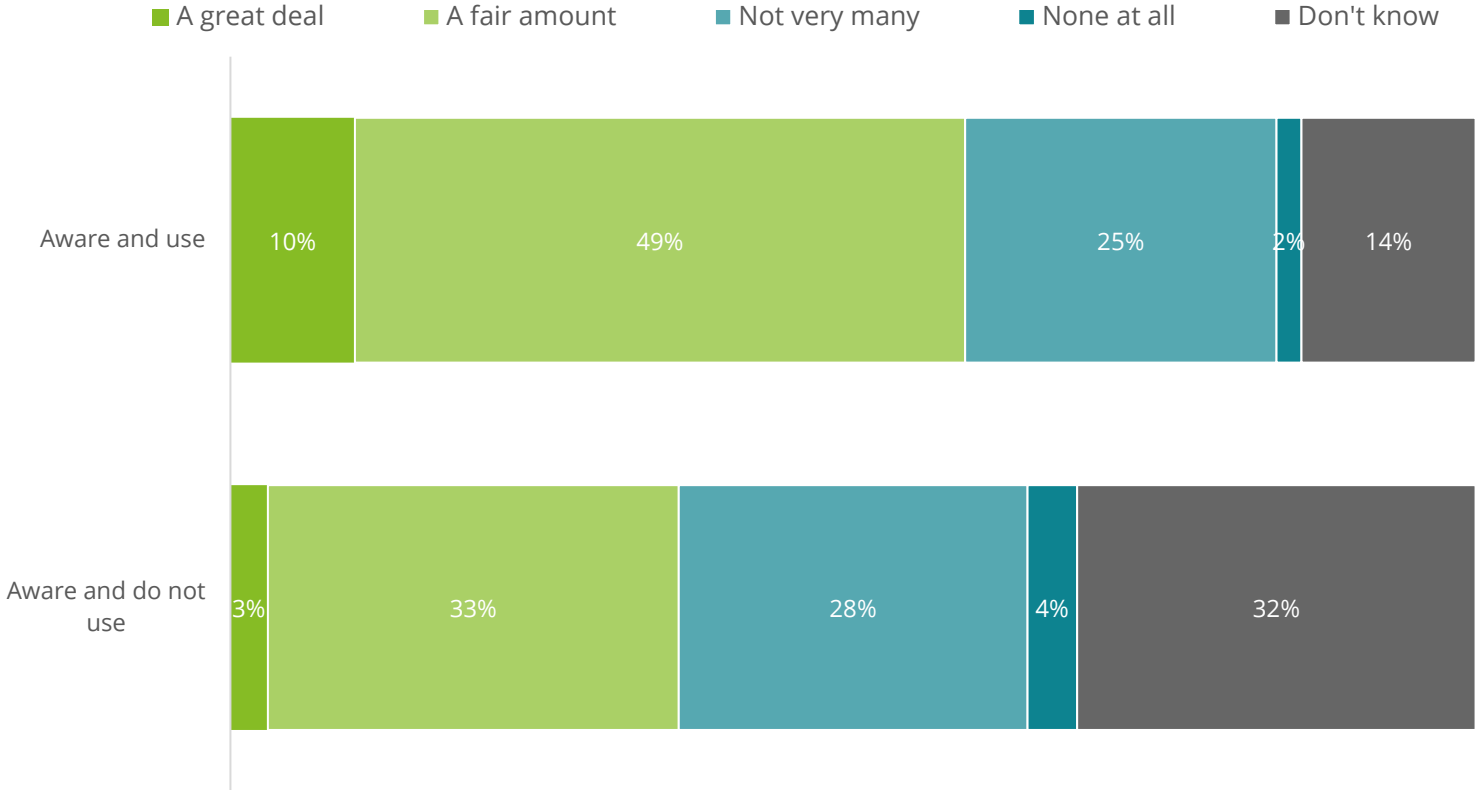
Q21. In the next 2 years, how likely, or not, do you think it is that generative AI will...?



### Approved vs non-approved use of generative AI

More than half of those familiar with GenAI report that employees in their country often use these tools for work without explicit employer approval, a sentiment stronger among users than non-users of Gen AI

Base: Aware and use GenAI (N = 1,171) | Aware and do not use GenAI (N = 624)  
 Q23. In your opinion, how many employees in your country use generative AI for work purposes without their employer explicitly approving its use?

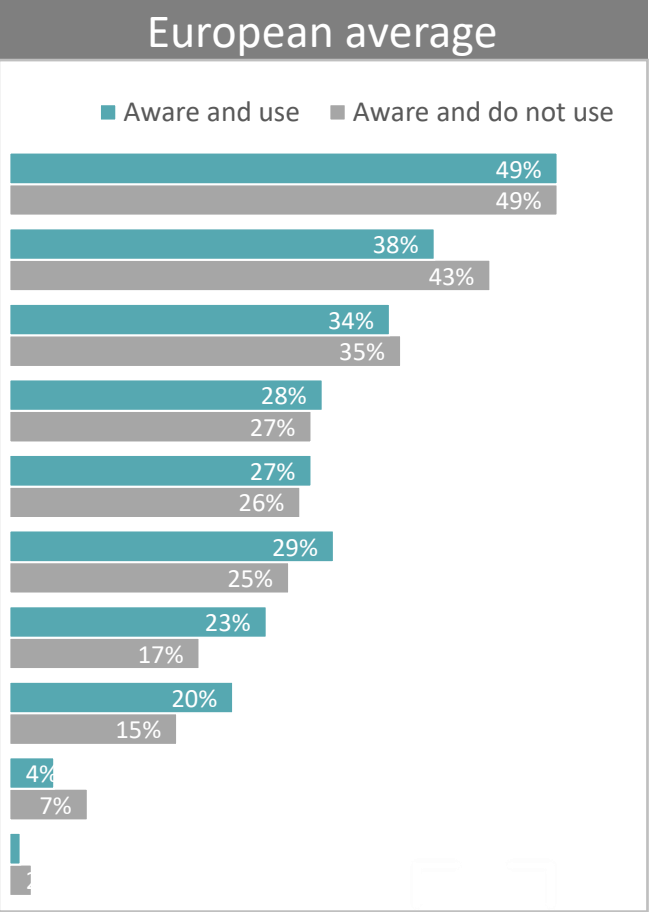
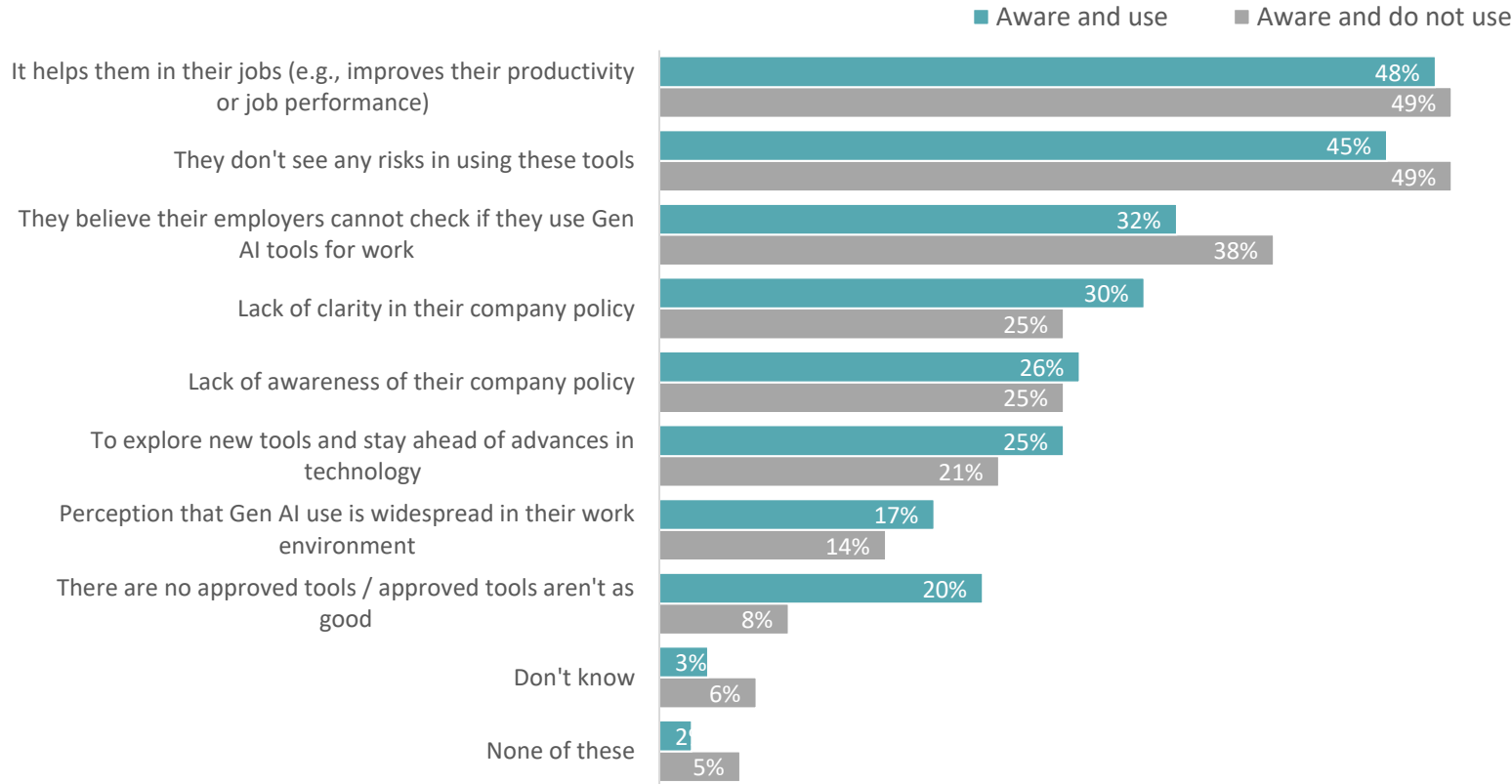




### Top reasons for non-approved use of generative AI for work purposes

The primary reason why employees use non-approved GenAI tools is to boost productivity, with this sentiment equally shared among both users and non-users

Base: Aware and use GenAI (N = 986) | Aware and do not use GenAI (N = 399)  
 Q24. Thinking about instances where employees use generative AI for work purposes without their employer explicitly approving its use. Which, if any, of the following reasons best describe why you think they do it?

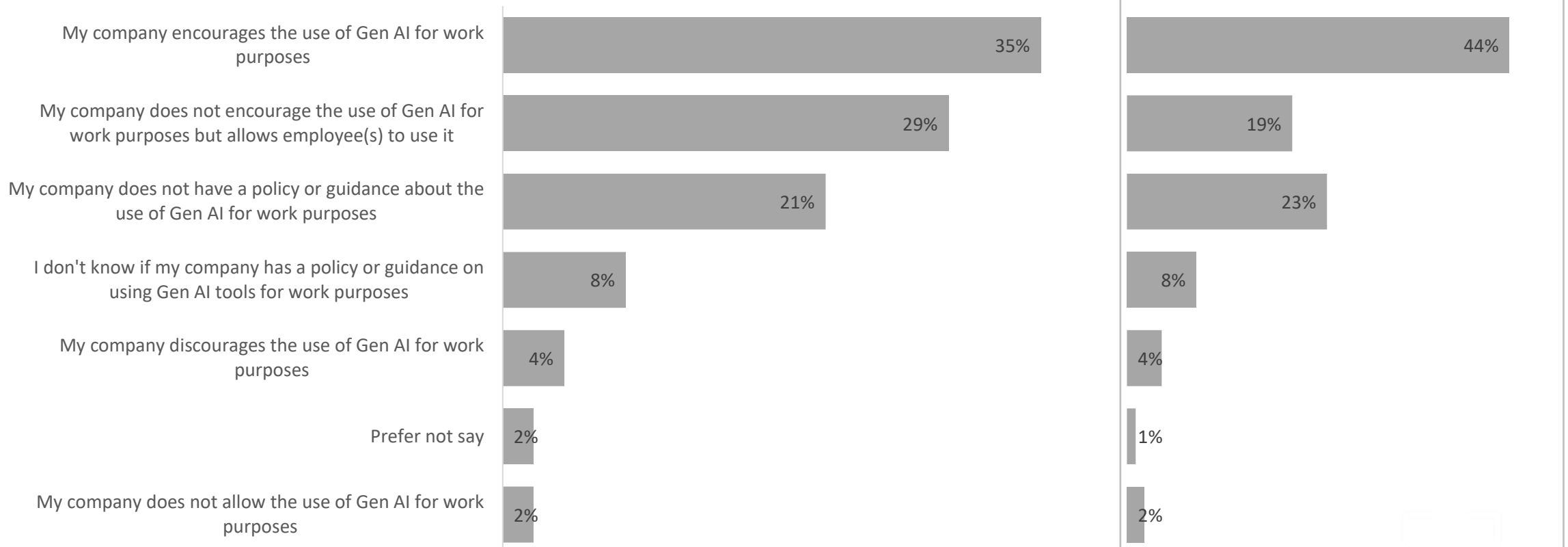


## Organisational policy around generative AI

Among those aware of Gen AI, 35% of Dutch employees report that their company actively encourages the use of generative AI for work purposes

Base: Aware and use GenAI for work purposes (N = 403)

Q16. Thinking about the use of GenAI tools for work purposes, which, if any, of the following statements applies to your company about the use of generative AI tools for work purposes?

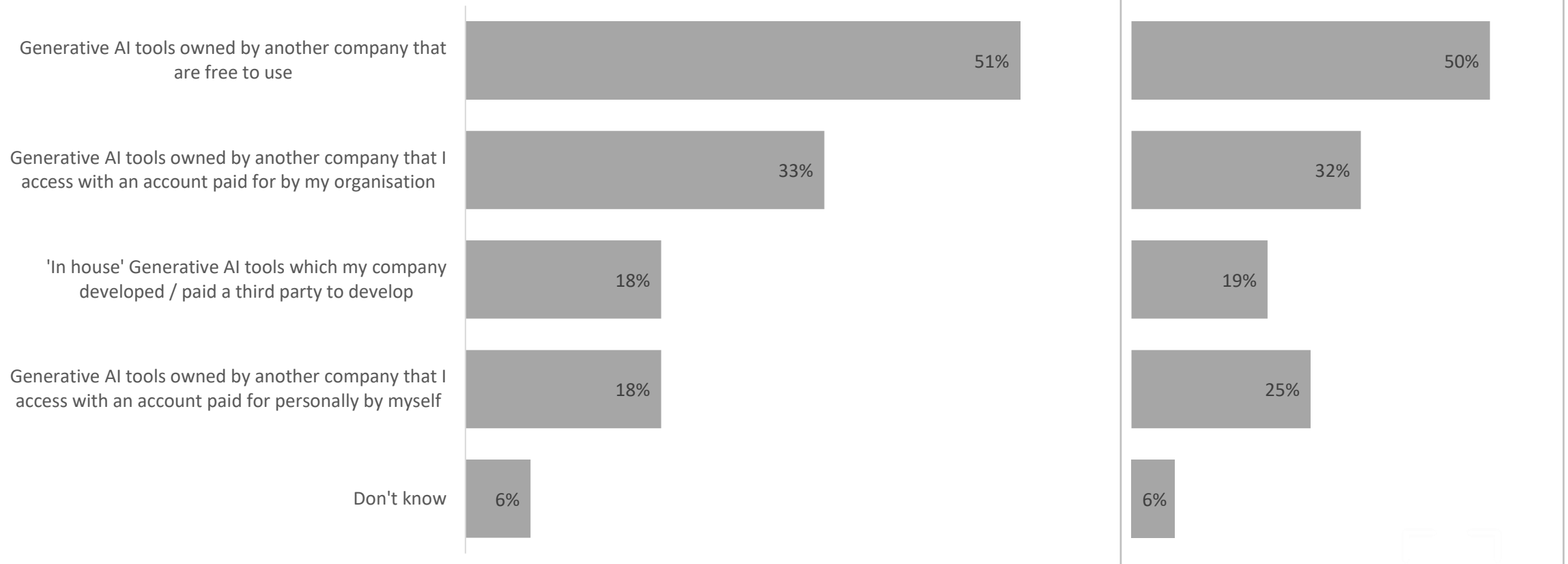


## Adoption patterns and investment strategies for generative AI tools

Among those using Gen AI, half of the Dutch respondents report utilising free GenAI tools provided by external companies

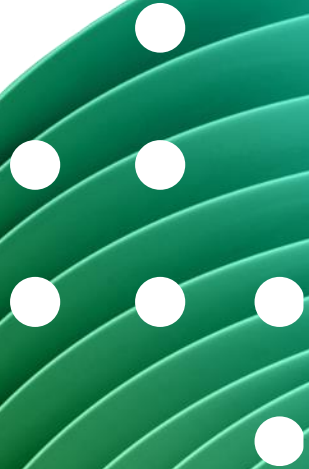
Base: Aware and use GenAI for work purposes (N = 403)

Q15. Which, if any, of the following statements describe the generative AI tools you have used for work?





# Appendix



# Consumer perspective

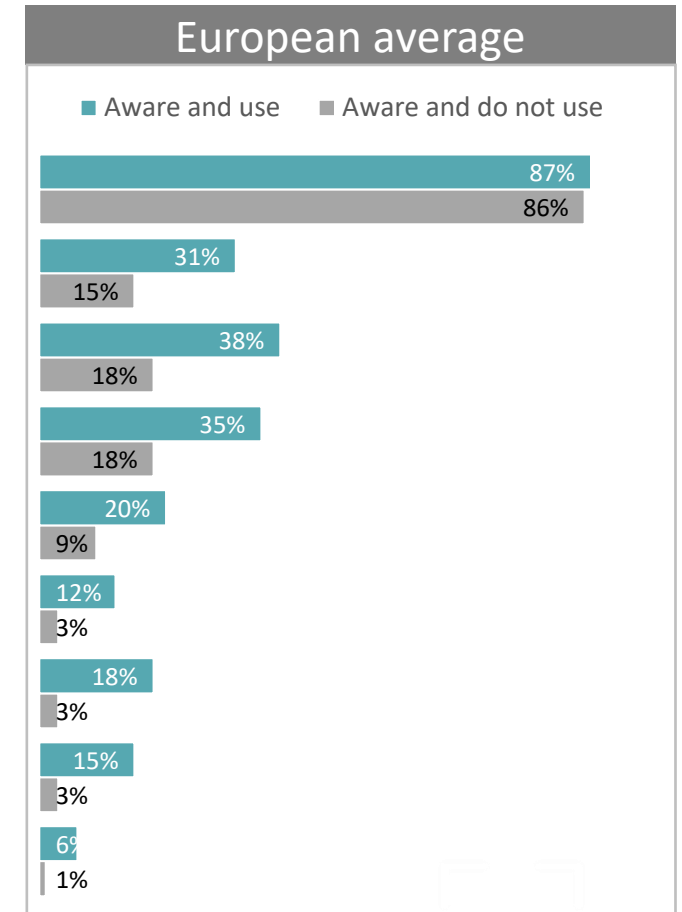
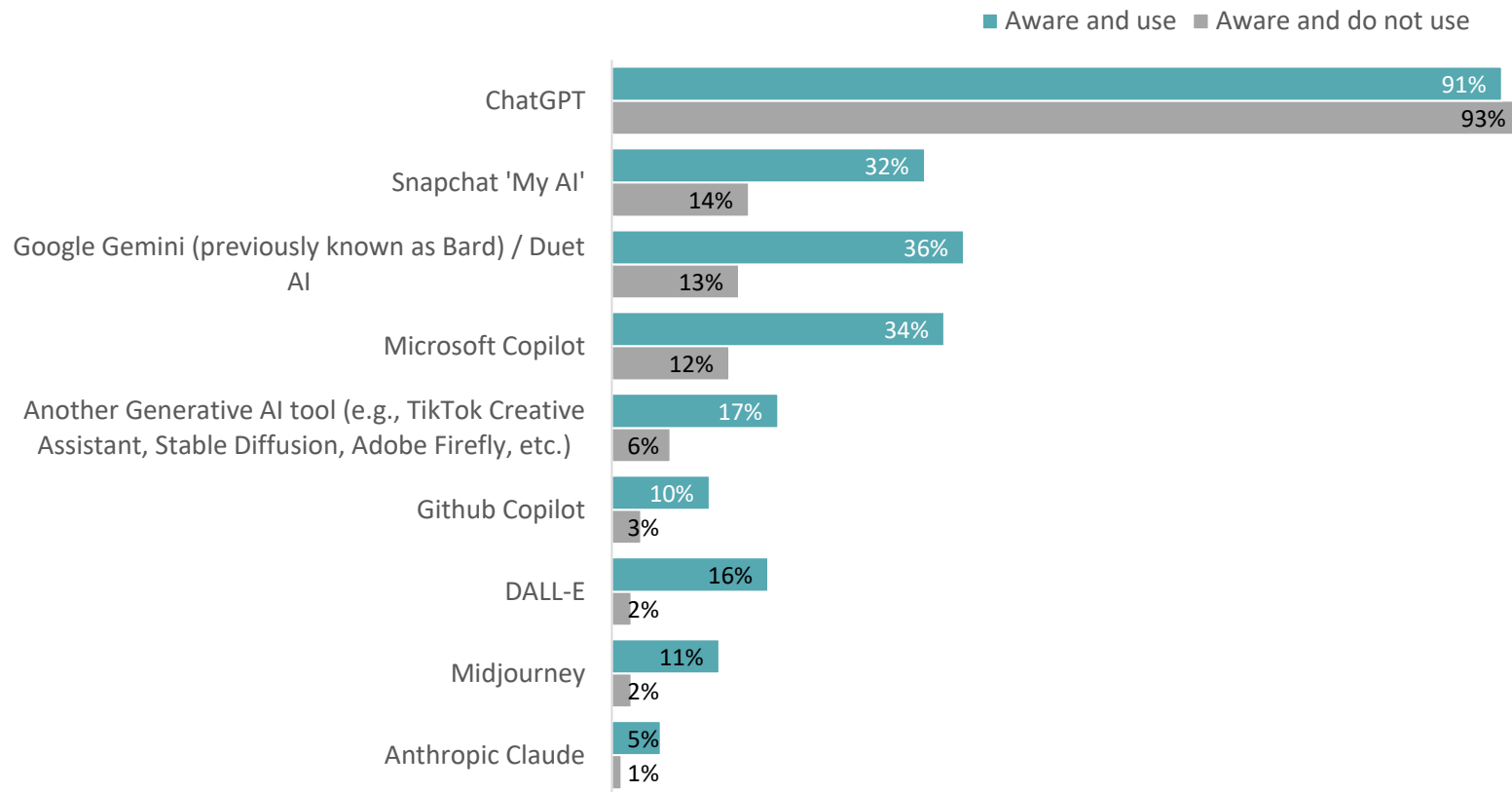




## Awareness of generative AI tools

Among Dutch respondents aware of GenAI tools, 9 out of 10 report being familiar with Chat GPT, regardless of whether they use GenAI or not

Base: Aware and use GenAI (N = 1,171) | Aware and do not use GenAI (N = 624)  
Q1. Which, if any, of the following generative AI tools are you aware of?

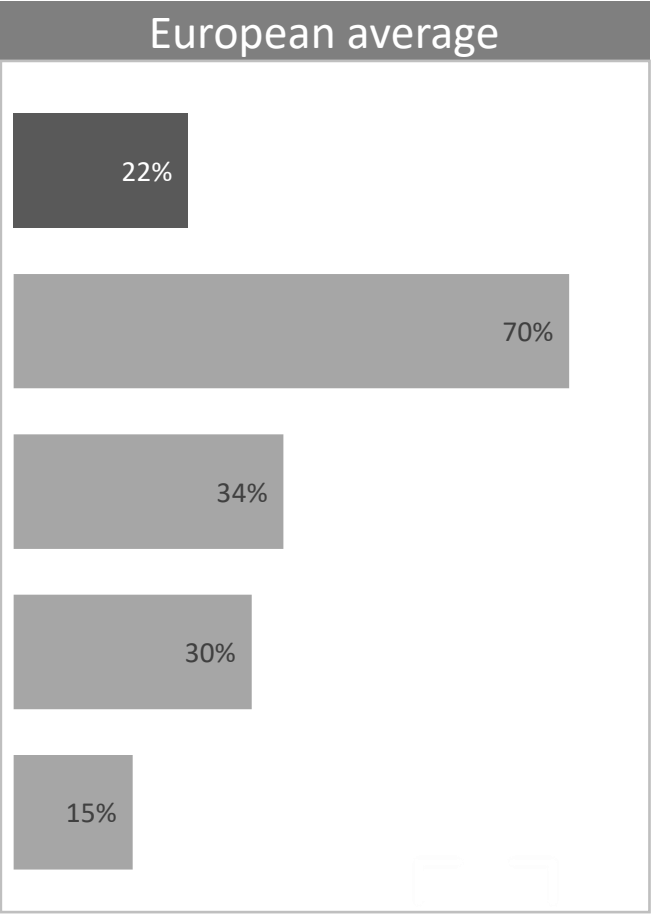
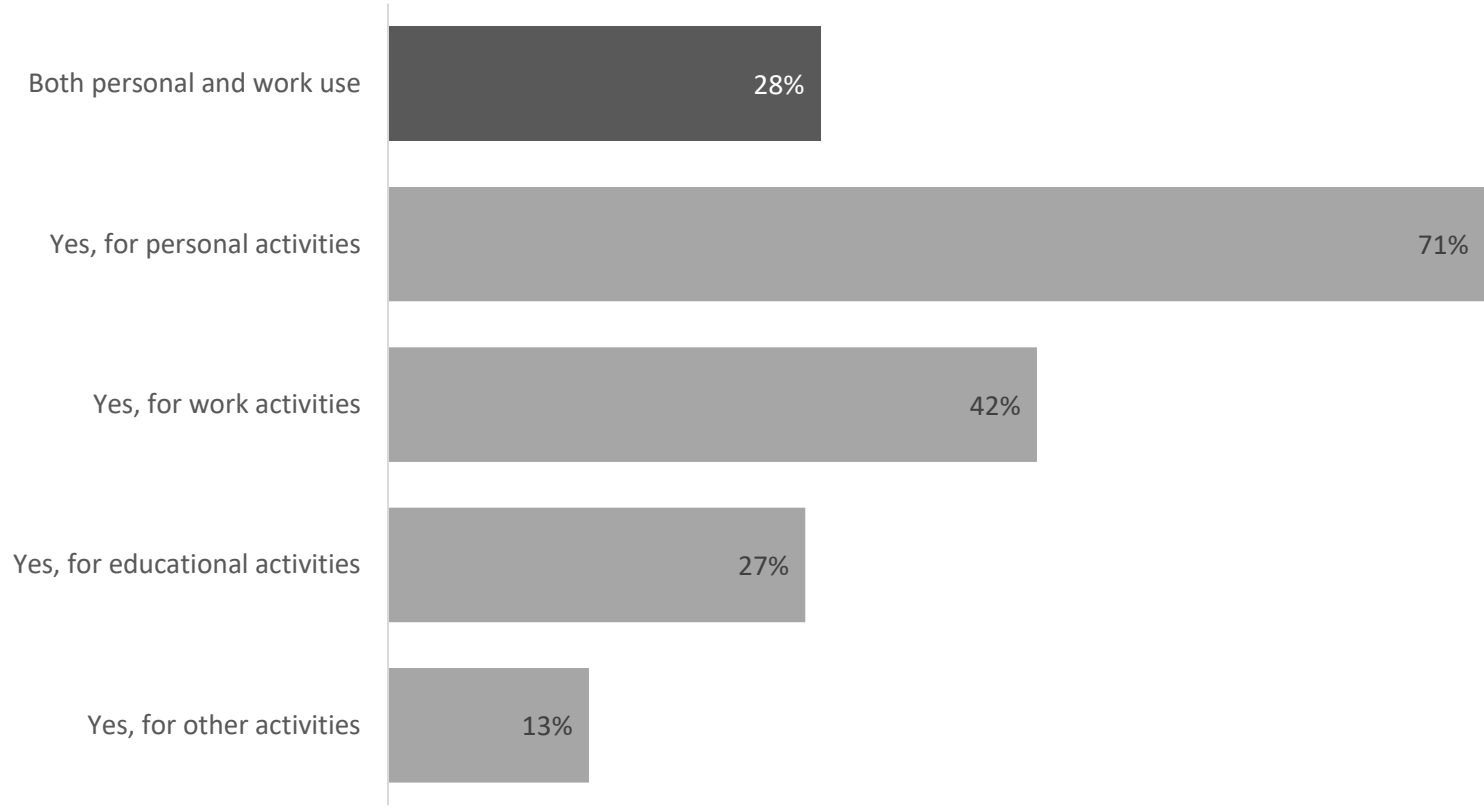




### Type of generative AI use

Among those aware of Gen AI, 71% have used it for personal activities, while 42% have used it for work-related tasks

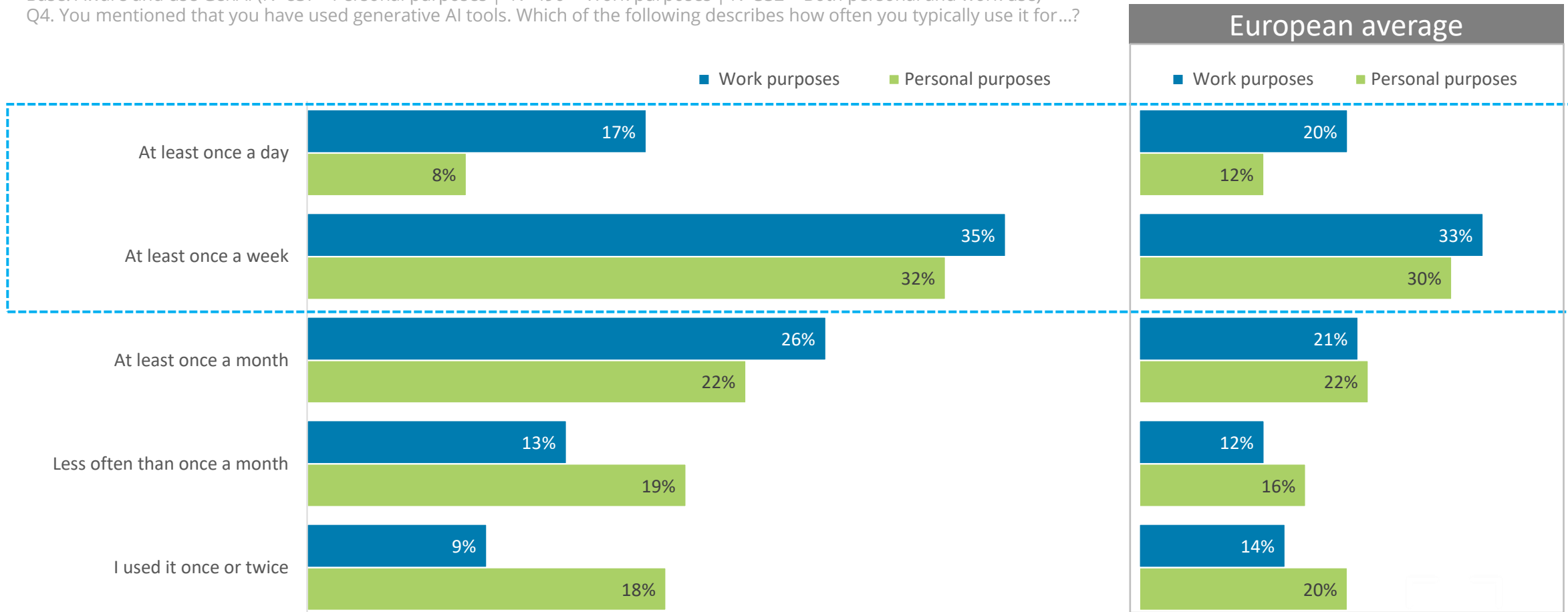
Base: Aware and use GenAI (N = 1,171)  
Q3. Have you ever used any generative AI tools, or not?



## Frequency of generative AI use

Of those who use Gen AI, a little more than a third of Dutch respondents use GenAI at least once a week for work purposes (35%) while a third have used it for personal purposes (32%)

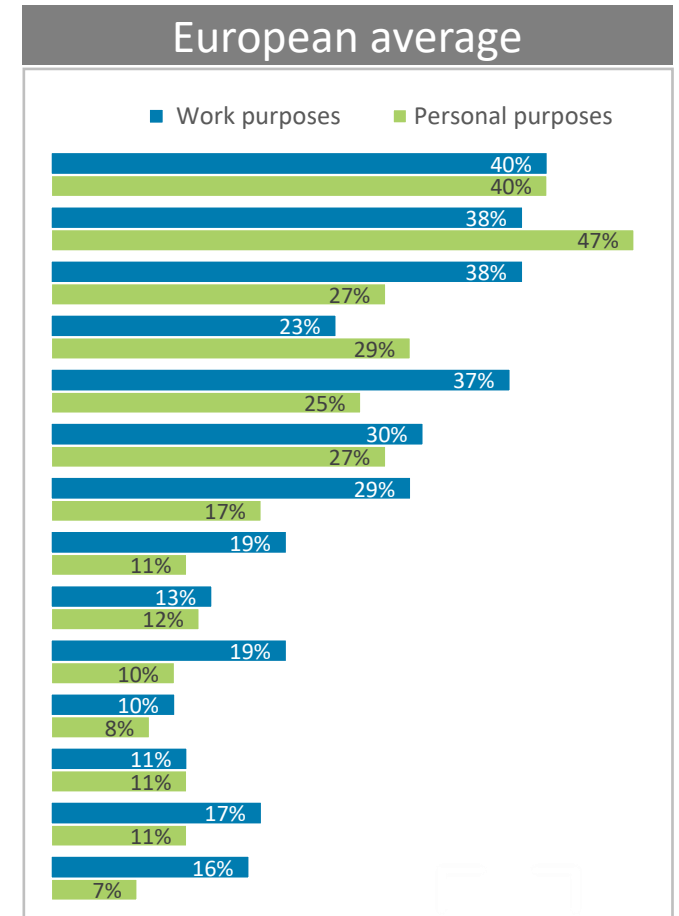
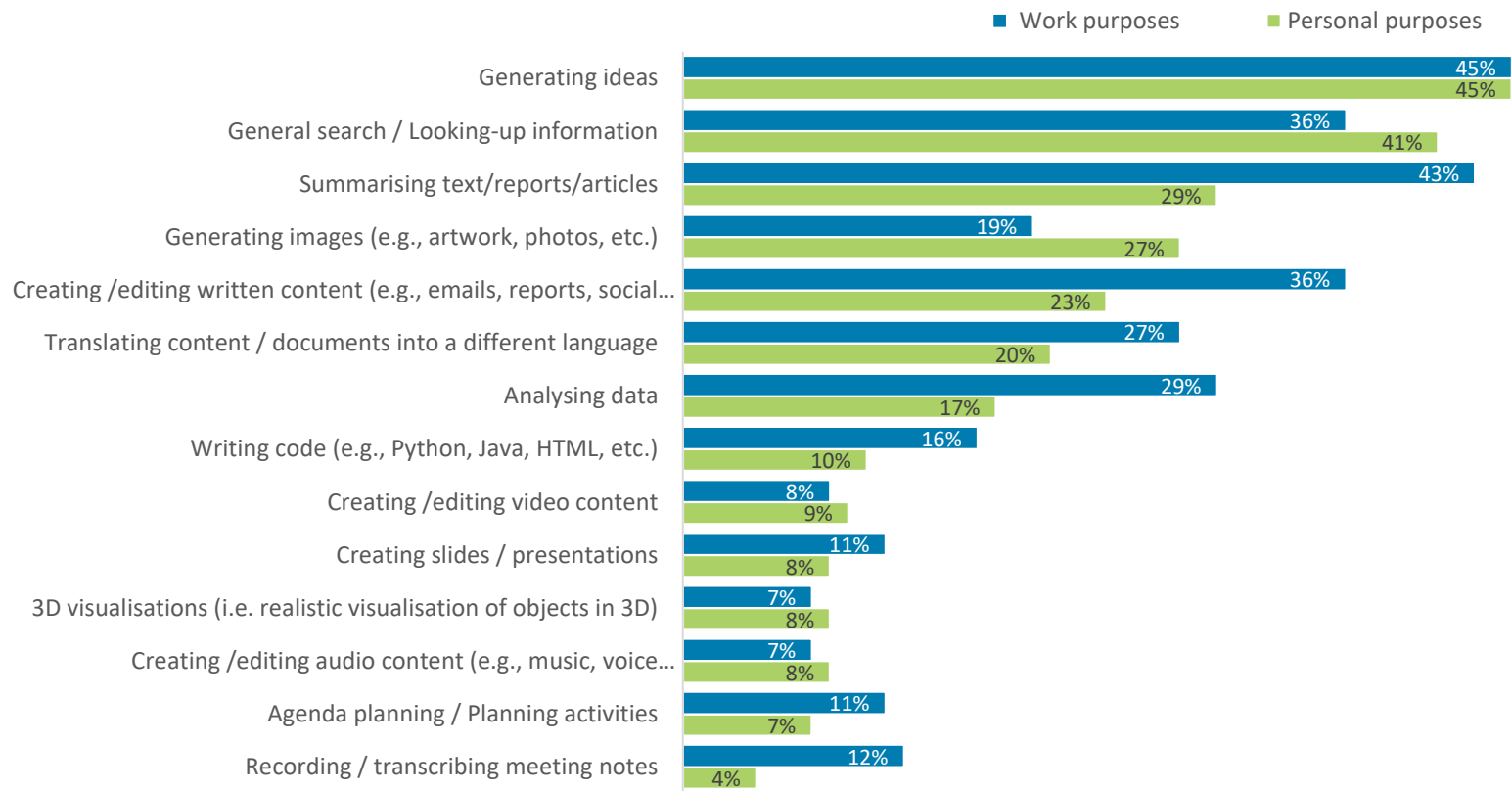
Base: Aware and use GenAI (N=837 - Personal purposes | N=496 - Work purposes | N=332 - Both personal and work use)  
Q4. You mentioned that you have used generative AI tools. Which of the following describes how often you typically use it for...?



## Use cases of generative AI

Generating ideas and general searches or looking up information are the primary use of GenAI for work purposes (45%) and personal use (45%) respectively

Base: Aware and use GenAI (N=837 - Personal purposes | N=496 - Work purposes | N=332 - Both personal and work use)  
Q5. For which of the following tasks do you typically use generative AI tool(s)?

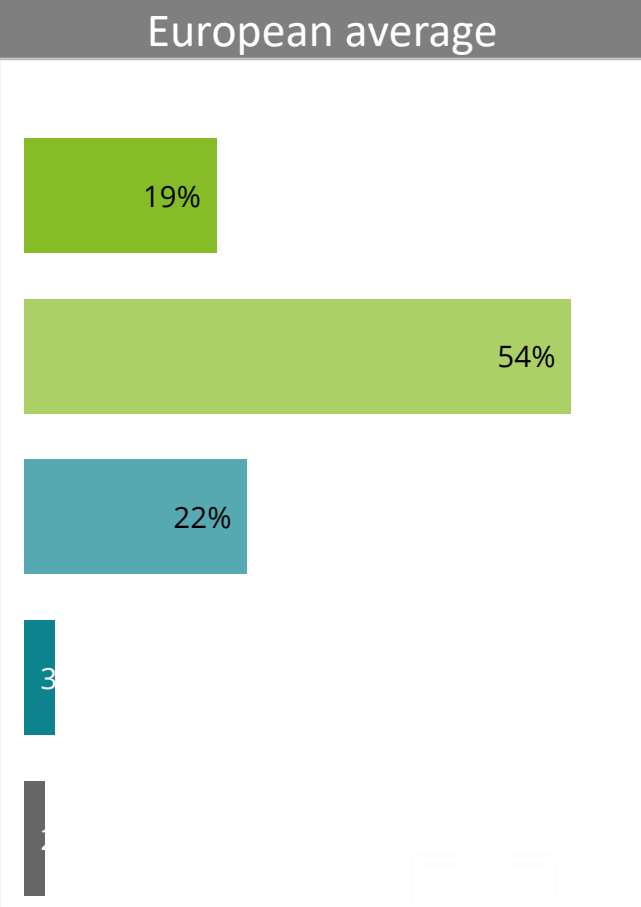
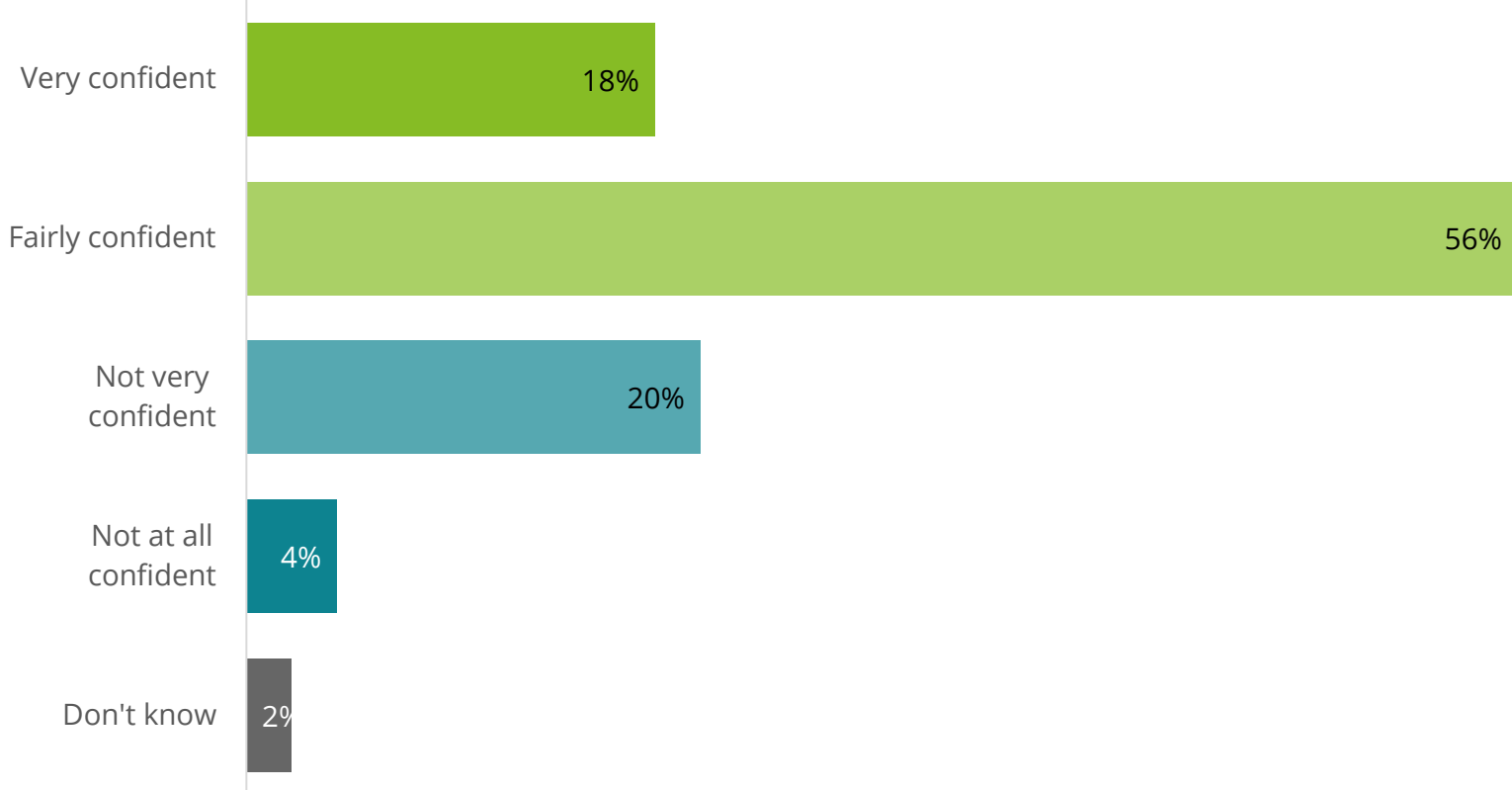




### Confidence in using generative AI

# 3 out of 4 European respondents report being very or fairly confident in using GenAI tools

Base: Aware and use GenAI (N = 1,171)  
Q6. On balance, how confident, or not, are you in using generative AI tool(s)?



# Employee perspective

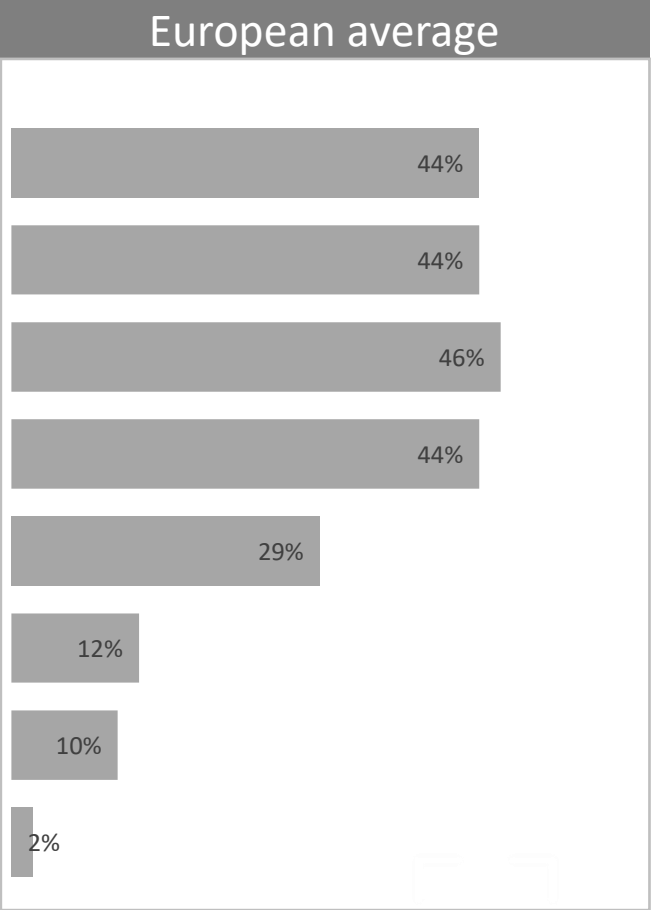
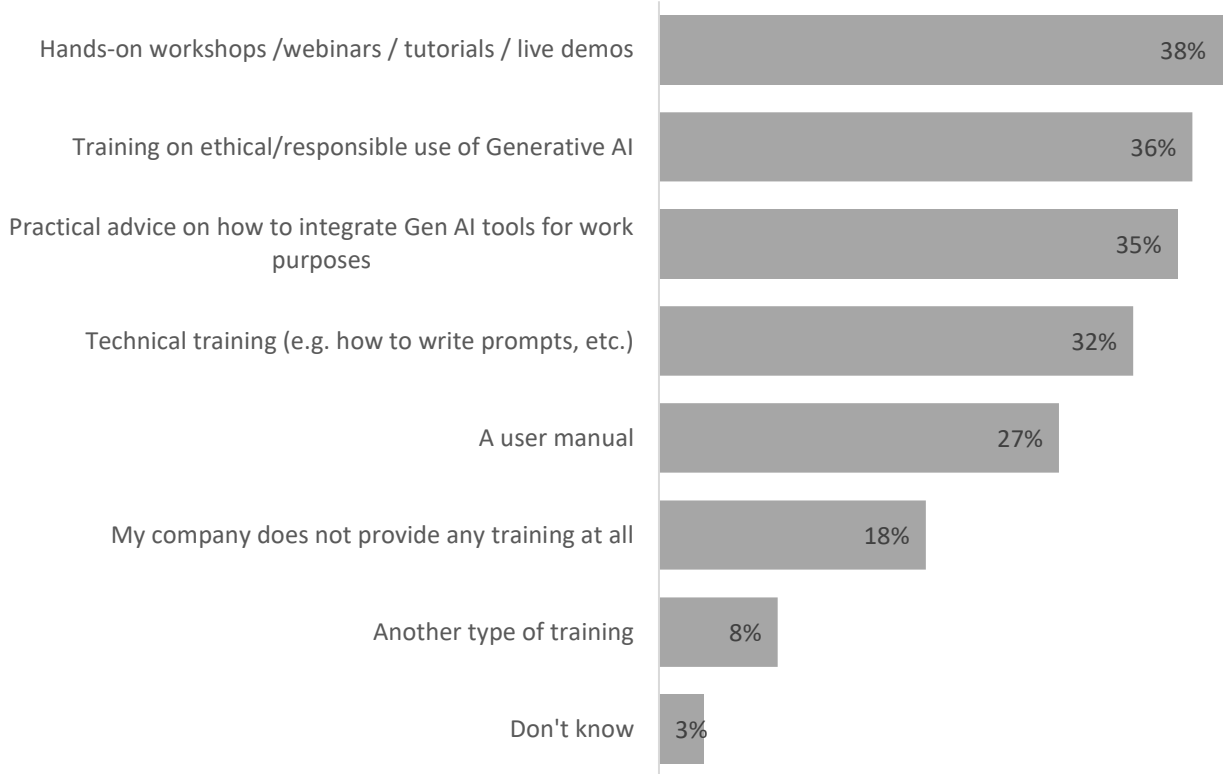


### Training on generative AI for work purposes

Among employees using in-house or organization-funded GenAI tools, more than a third say they have received training

Base: Aware and use GenAI (N = 177)

Q17. Which, if any, of the following types of training does your company provide for employees who use generative AI tools for work purposes?

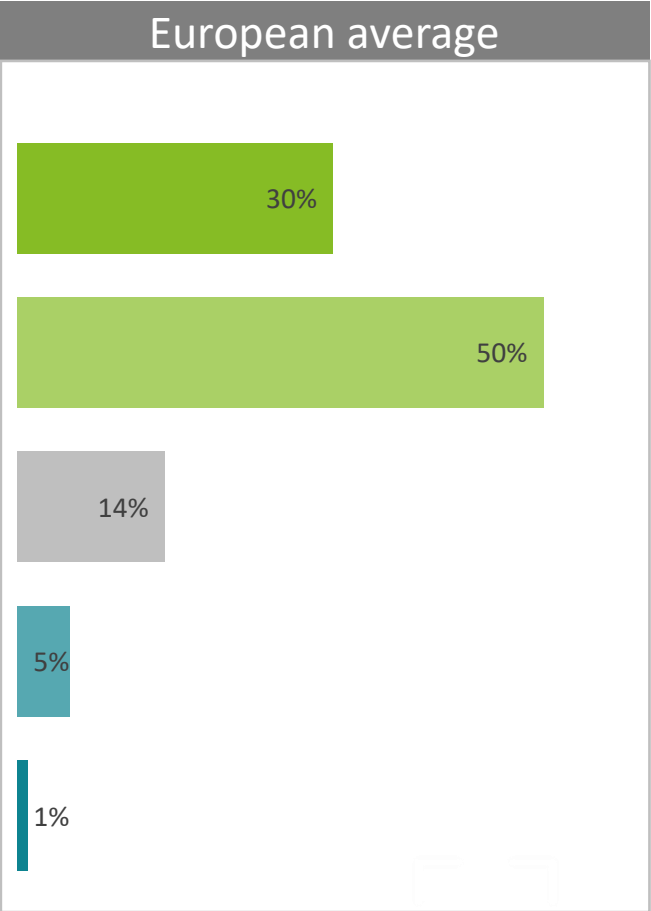
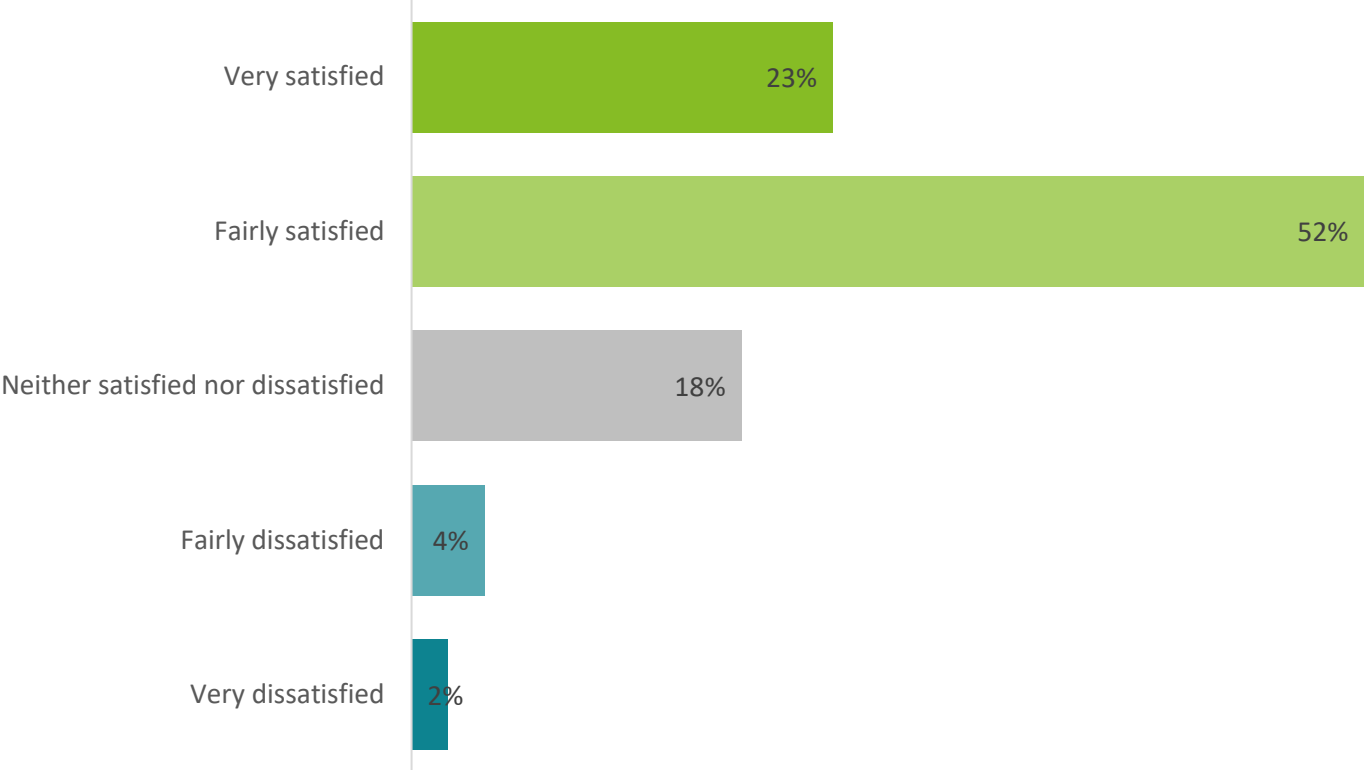




### Training on generative AI for work purposes

Of those employees who have received any type of GenAI training, 75% report high satisfaction with the training quality

Base: Aware and use GenAI (N = 140)  
Q18. Overall, to what extent are you satisfied or dissatisfied with the quality of the training that your company / employer has provided on generative AI tools for work purposes?

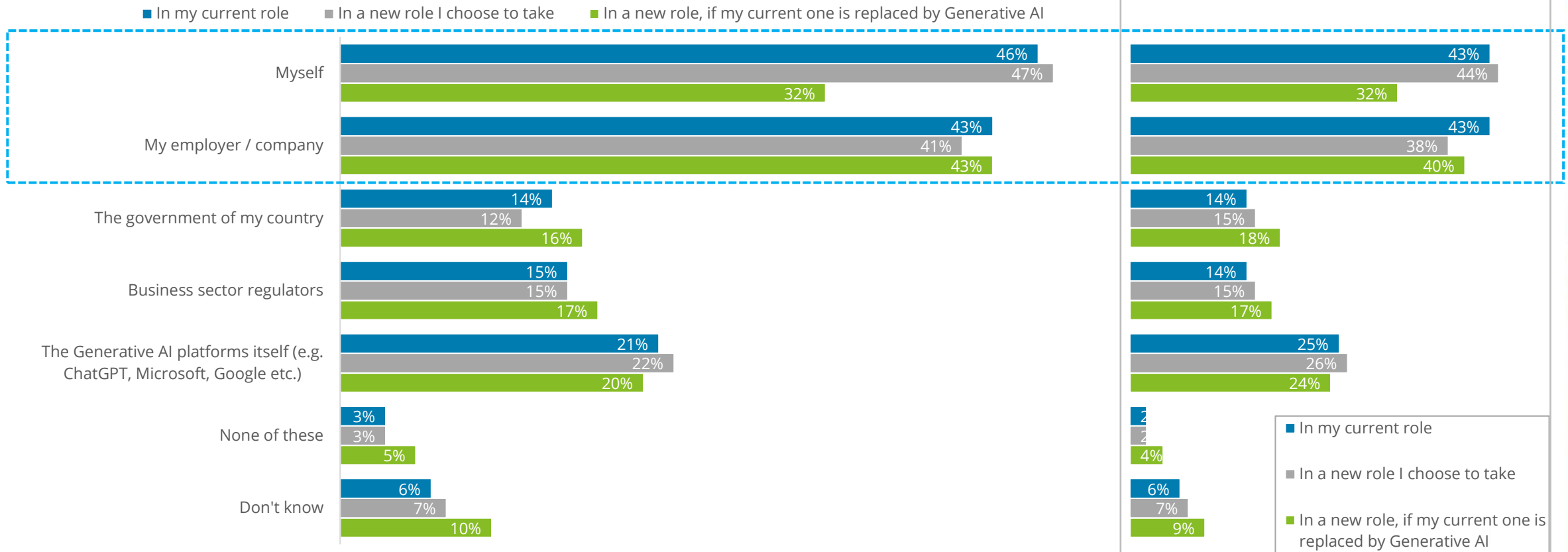


## Responsibility for developing generative AI skills

### Nearly half of GenAI users view upskilling as a shared duty

Base: Aware and use GenAI for work purposes (N = 403)

Q22. Who, if anyone, do you think should be responsible for developing your skills to use generative AI tools for work purposes in the following scenarios?



THANK YOU!





# Deloitte.

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