

PEOPLE AT WORK

2025



7

ARTIFICIAL
INTELLIGENCE



ARTIFICIAL INTELLIGENCE: THE GOOD, THE BAD, AND THE UNKNOWN

Contributors
Mary Hayes, Ph.D
 Research director
 People and Performance

Jared Northup
 Research analyst
 People and Performance

Nela Richardson, Ph.D
 Chief economist
 ESG Officer
 Head of ADP Research

Source: ADP Research
Global Workforce Survey

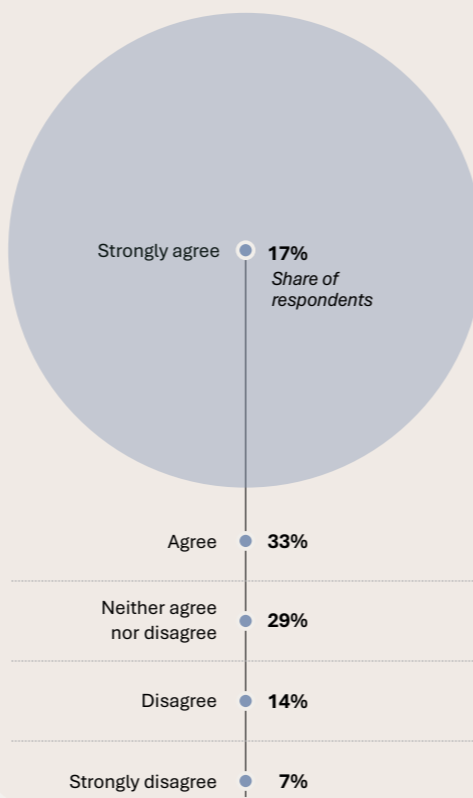
The transformative force of artificial intelligence promises significant benefit to some even as it gives rise to concern among many others. The technology’s potential to disrupt the workplace has prompted widespread discussion. This discourse, however, has largely overlooked the perspective of workers themselves.

We surveyed some 38,000 working adults on six continents between July 23 and August 6, 2024, to get a comprehensive view of how people feel about AI and how they think it might change their jobs. Our Global Workforce Survey sought respondents’ views on the positive contributions of AI, gauged their openness to and understanding of it, and asked them whether they feared

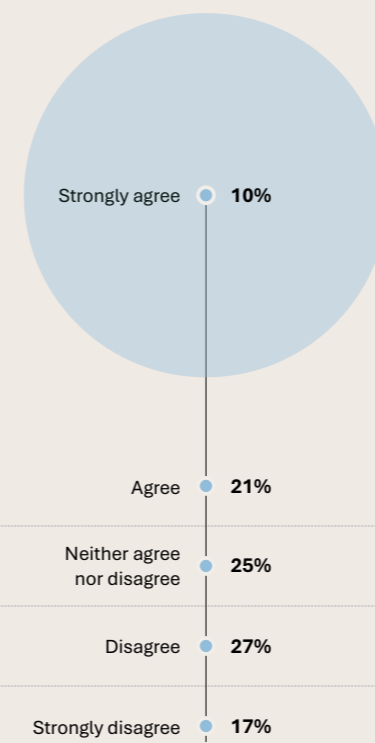
losing their jobs to the technology. No clear consensus emerged. While a plurality of respondents believed AI would have a positive impact on their work, feelings overall were mixed. As employers navigate the AI landscape, they’ll want to address employee concerns and foster a clear understanding of how the technology will be used in the workplace.

ANTICIPATED IMPACT OF AI, by global workforce

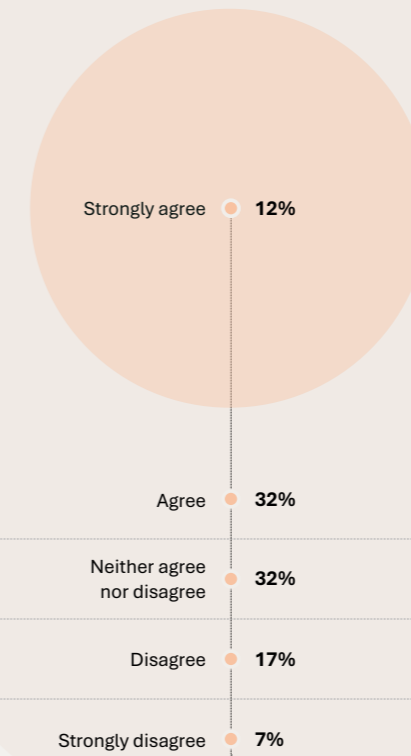
I believe AI will positively impact my job responsibilities in the next year.



I am scared that my job will be replaced by AI.



Currently, I have no idea about how AI will change my job.



ANTICIPATION, FEAR, AND INDIFFERENCE

It’s been said that AI won’t replace humans, but humans using AI will replace humans without it. We found that only 1 in 10 workers were scared the technology will cost them their jobs.

And while 17 percent of workers believed that AI would have a positive effect on their job, 27 percent of this group also said they feared being replaced by the technology. Among respondents who had more negative opinions of AI, or no opinion at all, only 7 percent were worried about being replaced.

In fact, the markets with the largest share of workers who have a positive outlook on AI—Egypt and India—also had the largest share of workers who feared being replaced by the technology.

In short, AI seems to trigger a contradictory set of emotions: excitement at its potential and fear of its ultimate impact.

Part of this contradiction could be attributed to anxiety about the unknown. Some markets in which a large share of workers feared being replaced by AI also had a large share who said they had no idea how AI will change their jobs.

Sweden and Japan had the smallest share of workers who were scared about AI. But they also had the smallest share of workers who believed its effect will be positive. This might add up to indifference, a sense that the technology will have little or no significant impact on their jobs.

AI seems to trigger a contradictory set of emotions: excitement at its potential and fear of its ultimate impact.



DEFINING THE TYPES OF WORKERS

Our survey gave workers three options for describing the work type that best fit their role:

✓ **Knowledge worker**
I have a level of freedom to use my expertise to create something new.

✓ **Skilled task worker**
I use a level of expertise to solve similar problems each day.

✓ **Cycle worker**
I do similar repetitive tasks each day.

We found distinct differences in AI sentiment by work type.

Knowledge workers, a category that includes roles like programmers, academics, and engineers, were by far the most likely to believe AI will have a positive impact on their jobs, but they also were the most worried about being replaced by AI.

This group appears to be simultaneously hopeful about AI and wary of its consequences. Again, these responses might reflect a fear of the unknown. Knowledge workers also were the most likely to say they don't know what the future will bring.

ANTICIPATED IMPACT OF AI, by work type.

Share of workers who strongly agree

Worker type	I believe AI will positively impact my job.	I am scared my job will be replaced by AI.	I have no idea how AI will change my job.
Knowledge	24%	13%	14%
Skilled task	13%	8%	9%
Cycle	8%	8%	11%

Source: ADP Research Global Workforce Survey

SECTORAL DIFFERENCES

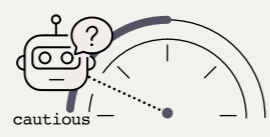
Worker sentiment about AI also showed differences depending on the sector.

Positive outlook on AI



- Technology services
- Finance and insurance
- Information

These sectors tend to be early adopters of innovative technology. And they prize efficiency and small gains in competitive advantage, both of which AI can enhance through automation, data analysis, and improved decision-making.



- Personal services
- Transportation and warehousing
- Health care and social assistance

These three sectors rely heavily on human interaction and personalized services, which might contribute to worker apprehension. People in these jobs might worry that AI could compromise the quality of personal service, or they could perceive it as a threat to jobs or a disruption to established workflows. And because these sectors require a human touch, workers might be more cautious about AI as they weigh the complexities of introducing technology into highly relational environments.

Fear AI



- Mining
- Agriculture
- Utilities

Fear of AI might stem from the dual-edged nature of technological advancements. While AI presents significant opportunities for efficiency and innovation, it also necessitates careful consideration of its impact on the workforce, the environment, and current practices. It's worth noting that these three sectors also have the largest share of workers—about 15 percent—who say they have no idea how AI will change their jobs. This unknown might be fueling fear.



- Public administration/service
- Educational services
- Health care and social assistance

Because many people who work in these sectors have hands-on jobs and deal directly with people on a daily basis, it's possible they believe that AI won't affect their jobs one way or another.

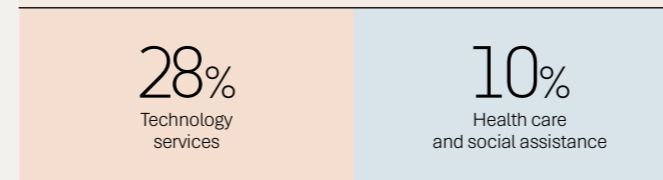
ANTICIPATED IMPACT OF AI, by sector

Workers in sectors that tend to be early adopters of technology were more likely to have a positive outlook on AI's potential impact on their jobs.

Share of workers who strongly agree

Sector with: ■ Largest share of workers who strongly agree ■ Smallest share of workers who strongly agree

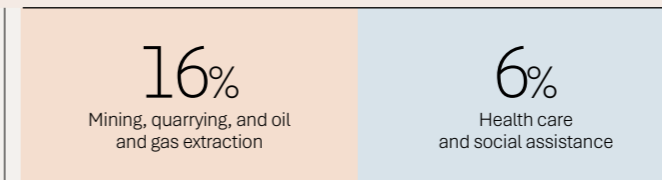
I believe AI will positively impact my job



Additional sector sentiment

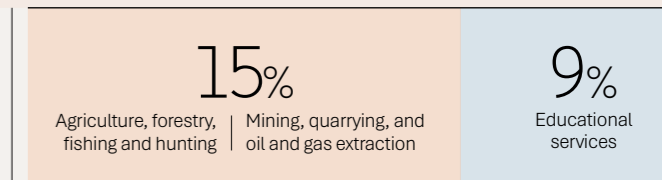
Finance and insurance	25%
Information	20%
Mining, quarrying, and oil and gas extraction	18%
Agriculture, forestry, fishing and hunting	18%
Manufacturing	17%
Real estate and rental and leasing	17%
Utilities	17%
Construction and related trades	16%
Professional, scientific, and technical services	15%
Retail/wholesale trade	15%
Educational services	15%
Administrative/support services and waste management/remediation	14%
Arts, entertainment, and recreation	14%
Public administration/service	13%
Accommodation and food services	13%
Other personal services	12%
Transportation & warehousing	11%

I am scared my job will be replaced by AI



Utilities	15%
Agriculture, forestry, fishing and hunting	14%
Technology services	12%
Finance and insurance	12%
Information	12%
Retail/wholesale trade	10%
Manufacturing	10%
Construction and related trades	10%
Administrative/support services and waste management/remediation	9%
Arts, entertainment, and recreation	9%
Other personal services	9%
Accommodation and food services	9%
Real estate and rental and leasing	9%
Transportation & warehousing	8%
Professional, scientific, and technical services	8%
Public administration/service	7%
Educational services	7%

I have no idea how AI will change my job



Utilities	14%
Information	13%
Finance and insurance	13%
Other personal services	12%
Public administration/service	12%
Technology services	12%
Construction and related trades	12%
Administrative/support services and waste management/remediation	12%
Arts, entertainment, and recreation	11%
Retail/wholesale trade	11%
Health care and social assistance	11%
Accommodation and food services	11%
Manufacturing	11%
Transportation & warehousing	11%
Real estate and rental and leasing	10%
Professional, scientific, and technical services	10%

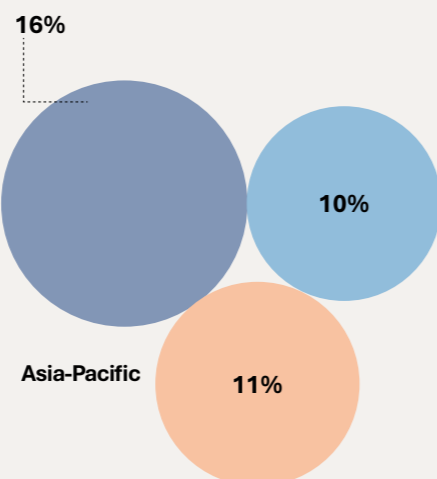
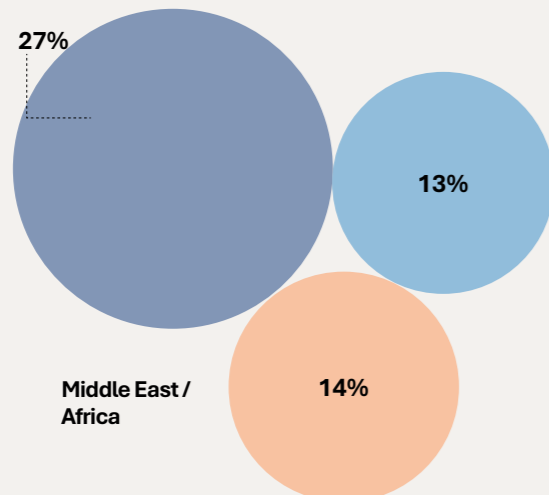
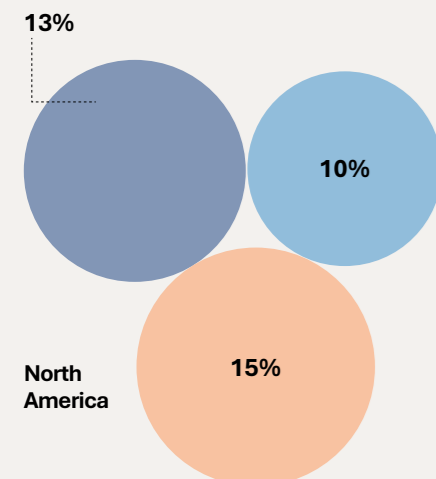
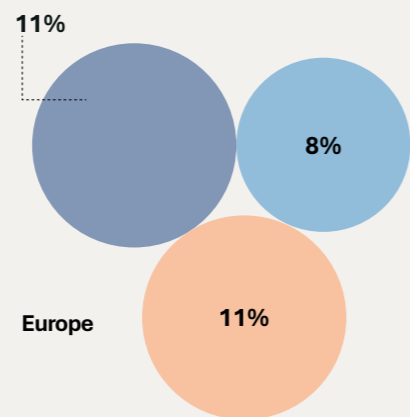
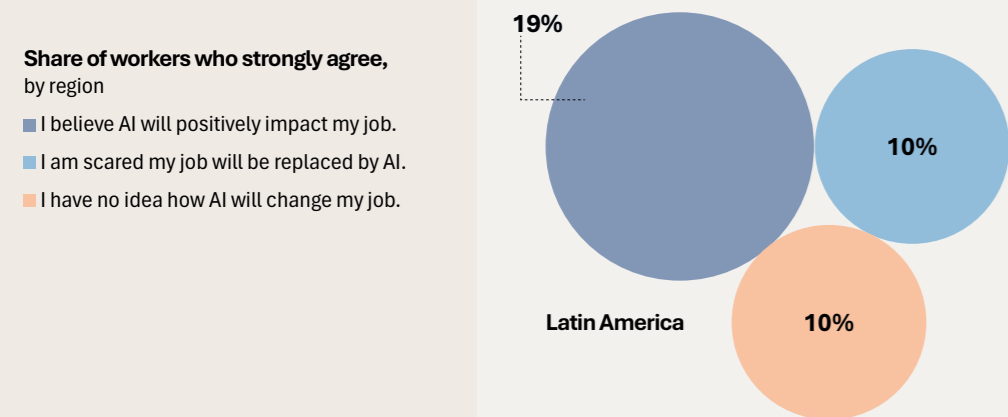


ANTICIPATED IMPACT OF AI

Workers in Egypt, India, and Nigeria were most likely to have a positive outlook on the potential impact of AI on their jobs. All three markets have implemented national strategies that might be contributing to positive worker sentiment.

Share of workers who strongly agree, by region

- I believe AI will positively impact my job.
- I am scared my job will be replaced by AI.
- I have no idea how AI will change my job.



Share of workers who strongly agree, by market

I believe AI will positively impact my job

Egypt	36%
India	34
Nigeria	32
Brazil	26
South Africa	25
Saudi Arabia	23
China	22
Vietnam	22
Mexico	22
Thailand	22
Philippines	19
Switzerland	19
Indonesia	19
United Arab Emirates	18
Argentina	17
Peru	16
Chile	16
Singapore	16
United States	15
United Kingdom	14
Spain	13
Canada	12
France	11
Germany	11
Taiwan	11
Australia	11
Netherlands	11
New Zealand	10
Poland	9
Italy	8
South Korea	8
Czech Republic	7
Sweden	6
Japan	4

I am scared my job will be replaced by AI

Egypt	22%
India	17
Saudi Arabia	15
Philippines	15
Switzerland	13
United States	13
Thailand	12
Mexico	12
China	11
Singapore	11
United Arab Emirates	11
Brazil	10
Peru	10
Spain	10
Vietnam	10
Germany	9
Australia	9
United Kingdom	9
Indonesia	9
South Africa	9
Chile	9
Canada	8
Nigeria	8
France	8
Italy	8
South Korea	8
New Zealand	8
Poland	7
Czech Republic	7
Argentina	7
Taiwan	7
Netherlands	7
Sweden	4
Japan	4

I have no idea how AI will change my job

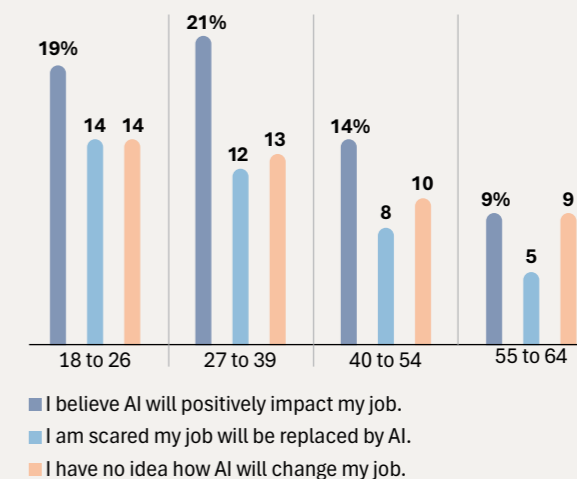
Egypt	21%
Singapore	19
India	18
United States	17
Switzerland	16
Saudi Arabia	16
Germany	15
Canada	14
United Arab Emirates	13
Thailand	12
Philippines	12
United Kingdom	12
Mexico	12
Brazil	12
France	11
Vietnam	11
Czech Republic	11
Netherlands	11
China	11
Sweden	11
Spain	10
Australia	10
Nigeria	10
Poland	10
New Zealand	9
Chile	9
South Africa	9
Italy	9
South Korea	8
Peru	8
Japan	8
Argentina	8
Indonesia	8
Taiwan	7

AGE PLAYS A ROLE

The younger the worker, the more likely they were to show both optimism and concern about AI. Workers who are early in their careers might be considering how advancements in AI technology might affect them in the long term.

North America led the world by far in the share of younger workers who are unsure about the future. In the United States and Canada, about one-fourth of workers younger than 27 had no idea how AI will change their jobs.

ANTICIPATED IMPACT OF AI, by age group
Share of workers who strongly agree



Source: ADP Research Global Workforce Survey

*We asked survey respondents the following question: In the last year, how often have you experienced (bad) stress at work? Respondents who said they experienced bad stress every day were categorized as high stress. Those who said two to six times per week were categorized as moderate stress. Those who said once a week or less were categorized as low stress.

THE TAKEAWAY

Fear can lead to heightened stress in workers. Respondents who were scared about being replaced by technology were twice as likely to experience high stress at work compared to those who were less worried.¹ Even workers who have no idea how AI will change their jobs were nearly twice as likely to be highly stressed. And workers who fear for their jobs are more likely to be looking for employment elsewhere.

More than 30 percent of workers who felt strongly that they could be replaced by AI were actively looking or interviewing for a new job, compared to only 16 percent of respondents who were less scared. As employers navigate the transformative landscape of AI, it will be crucial for them to address employee concerns and foster a clear understanding of the technology's benefits. Communication can contribute to a supportive work environment that minimizes worker fear and maximizes the potential of AI as a collaborative workplace tool.

OUR MISSION

The ADP Research mission is to make the future of work more productive through data-driven discovery.

Companies, workers, and policymakers rely on our finely-tuned data and unique perspective to make informed decisions that impact workplaces around the world.