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ARTIFICIAL INTELLIGENCE IN ASIA:

TRUST, UNDERSTANDING AND THE OPPORTUNITY TO RE-SKILL

**A REPORT PRODUCED BY YOUGOV
IN PARTNERSHIP WITH SALESFORCE**

IN THIS WHITE PAPER

As you read this white paper, consumers with access to more information and greater interpersonal connection than ever before, are undergoing a crisis in trust. Every pillar of society is impacted and must work harder than ever to gain and retain the trust of their stakeholders and the wider community.

In this age of rapid technology development, business leaders have a responsibility to lead their own companies and society. According to the 2018 Edelman Trust Barometer, 84% of consumers expect CEOs to inform conversations and policy debates on pressing societal issues such as jobs, the economy, automation, regulation and globalisation[1].

One of the most challenging technologies of the Fourth Industrial Revolution is artificial intelligence (AI), because of its potential to radically alter the way people live and work. Led by industry, AI is becoming increasingly pervasive, challenging consumers to understand and adopt the use of the technology.

According to McKinsey, automation backed by AI is poised to affect an estimated 75 million to 375 million people worldwide by 2030[2]. With a large proportion of the workforce to be impacted by this new wave of technology, people expect business leaders to have solutions for transitioning employees to new jobs.

Outside of the impact of AI on jobs, there's a dearth of information about consumer attitudes to AI. There has been limited research into consumer perception, understanding and trust of AI technology.

Designed as a deep dive into the implications for Asia of global insights surfaced in the Salesforce Research report, Trends in Customer Trust, this white paper relies on findings from a July 2018 YouGov survey of consumers commissioned by Salesforce.

The survey engaged 7,092 consumers from seven markets in Asia: Singapore, India, Hong Kong, Malaysia, Thailand, Indonesia and the Philippines. Using their responses, the paper explores perceptions and uncovers the state of consumer trust of AI in Asia by measuring awareness, understanding, and use of AI products and services.

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1 Edelman, "Trust Barometer", 2018
2 McKinsey Global Institute, "Jobs Lost, Jobs Gained: Workforce Transitions in a Time of Automation", January 2017

EXECUTIVE SUMMARY

- Trust in AI strongly correlates to how well consumers understand the technology: the higher the level of understanding, the higher the trust. Respondents who report high levels of understanding about AI are also likelier to have a positive outlook on it.

- Trust varies dramatically across different AI applications. Distrust of AI is the most pronounced with chatbots, where 53% of respondents say they would trust a human to help them resolve an issue versus 13% who would trust AI to do so. Overall, Asian consumers strongly trust humans over AI: content recommendation engines (29%) are the only AI applications trusted by Asian consumers over humans (24%).

- One in three Asian consumers are not aware of AI-powered content recommendations and product recommendations. This indicates that they may not be aware of the ubiquity of AI embedded deep in their everyday lives, and possibly impacting even their taste preferences and purchase decisions.

- Asian consumers tend to trust AI only for simple and rudimentary tasks, such as scheduling morning alarms (46%), setting calendar reminders for bill payments (44%) and controlling IoT appliances in smart homes (35%).

- AI is seen to positively improve the world (58%) more so than the everyday lives (40%) of consumers. However, this sentiment gap is set to narrow in future: 66% expect AI to improve the world in future, while 56% say AI will improve their lives.

- Optimisation of lives is a major positive outcome of AI for Asian consumers. Respondents cite increasing convenience (63%) and freeing up time (52%) for pursuing other tasks and activities as AI's biggest benefits.

- Asian consumers are largely dissatisfied with a lack of transparency in how their data is handled by companies. Almost seven in 10 respondents say companies keep them in the dark about how their data is used (69%) and do not give them control over the data that they share with them (67%).

- Upskilling is viewed as necessary. The majority (58%) of respondents see the need to upgrade their skills in preparation, and are willing to do so.

CONSUMER AWARENESS OF AI: HOW MUCH DO THEY KNOW?

AI is projected to drive US$1.2 trillion in global business value in 2018 and reach US$3.9 trillion by 2022, according to a recent April 2018 forecast by Gartner. The emergence of AI represents massive potential for businesses everywhere, whether it is to boost sales productivity, automate business processes, or to serve customers better with predictive analytics. But exactly how familiar or acquainted are consumers with AI? How well do they know it?

" **Most Asian consumers are aware of AI.** But only two in five admit to having an understanding of what AI really is. "
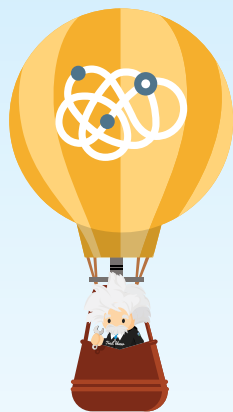
AI is very much on Asia's radar. *A high majority (77%) of 7,092 consumers surveyed across Hong Kong, India, Indonesia, Malaysia, Philippines, Singapore and Thailand are aware of AI.* Much of this awareness appears to be superficial, however: only two in five consumers (40%) lay claim to understanding what AI really is.

Awareness does not always constitute in-depth understanding. *Singapore and Hong Kong rank highest on awareness, but lowest on understanding.* While 89% of consumers in these markets exhibit high awareness of AI, they also display the lowest levels of understanding of what AI actually is: only 32% of respondents of Singapore say they understand AI, while 29% in Hong Kong claim the same. *Only in the Philippines are consumers likelier to understand AI than not.* 56% of respondents in the Philippines – the highest of all markets surveyed – say they understand AI, while 86% of respondents are aware of AI.

THE OUTLOOK ON AI: MOSTLY POSITIVE

Consumer sentiment around AI is where things get a little complicated. ***Asian consumers are mostly positive about AI.*** 54% of respondents feel positive to some extent about AI; this includes 10% who are extremely positive about it. 41% are neutral about AI, while about 5% show negative emotions towards it. ***Thailand and India are Asia's most receptive markets to AI.*** 70% of consumers in Thailand and 64% in India exhibit the highest levels of positivity towards it.

However, while AI is seen to improve the world as well as the lives of consumers, it is also perceived as doing so to differing extents. ***There is a consistent sentiment gap with how consumers feel about the impact of AI on their own lives when compared with its impact on the world.*** 58% of respondents say AI is currently improving the world, while only 40% see AI as improving their lives. This sentiment is strongest in Hong Kong and Singapore, where the sentiment gap is the widest at 23 and 22 percentage points respectively.

How does the future look with AI in the picture? ***Asian consumers are optimistic about the future that AI will bring.*** 66% expect AI to improve the world in the future, while 56% say AI will improve their lives. This represents a narrowing of the above-mentioned sentiment gap between AI's impact on the world and on consumers' lives, taking it from the current sentiment gap of 17 percentage points to just 10 percentage points in future.

Why are they upbeat about AI? Most Asian consumers see themselves reaping the biggest benefits from AI through optimisation of their lives. Respondents cite increasing convenience (63%) and freeing up time (52%) for pursuing other – and presumably, more enjoyable – tasks and activities as the biggest benefits, followed by a smarter society (50%).

Shrinking job opportunities are the biggest cause for concern for Asian consumers. 41% cite less job opportunities as the biggest threat posed by AI that would carry negative implications for them. However, the majority of Asian consumers are keen to upskill. 58% of respondents see the need for it, and are willing to do so.

Consumer understanding is strongly correlated with outlook. Respondents who report a high level of understanding about AI are more likely to have a positive outlook on it; the higher their perceived level of understanding, the more positive the outlook.

For the majority of respondents (45%), the more they understand AI, the more they trust it. ***Consumers in India are the most trusting consumers with an increased understanding of AI.*** 54% of respondents in India say their trust in AI rises along with how much they understand the subject. However, consumers in Hong Kong are the most likely to have reduced trust in AI as their understanding of the technology increases. 26% of respondents say their trust in AI falters as they come to grips with the subject.

REAL-LIFE APPLICATIONS: TRUST, ATTITUDES AND READINESS

Taking specific real-world applications that underpin the different types of AI-driven technologies into consideration, the survey explores the level of familiarity and comfort shown by Asian consumers, whether they have interacted with the applications, and forecasts future demand in the adoption of these AI-enabled products. Given a choice, would they trust AI to carry out the task, or a human?

ROBO ADVISORS

Robo advisors gather information about the user's financial situation and goals and use AI to provide automated, algorithm-driven financial planning services, such as investment solutions.

Half of Asian consumers are open to using robo advisors. While 62% of respondents across all markets did not know what robo advisors were prior to the survey, 55% would consider adopting one in future. *However, out of the six surveyed AI applications, robo advisors see the lowest awareness levels.* Only 38% of respondents are aware of robo advisors. *Consumers in Thailand and Hong Kong are the most aware of robo advisors.* In these markets, 53% and 52% of respondents respectively know about robo advisors.

Asian consumers generally trust humans over AI for their financial needs. 47% would trust a human wealth manager to manage their wealth, versus 16% who would pick a robo advisor. The biggest reasons for trusting humans are suitability for their needs (70%) and greater peace of mind (64%). *Singapore and Hong Kong show the highest distrust levels in robo advisors.*

Only 15% and 14% of consumers respectively from these markets would choose a robo advisor over a human wealth manager. Hong Kong is the only market where respondents are more aware of robo advisors (52%) than they are willing to consider the use of one (41%). Consumer openness to robo advisors may be lower as Singapore and Hong Kong are major financial centres in Asia.

In most of the markets, consideration rates are higher compared to awareness rates. *Robo advisors enjoy the highest level of consideration in Thailand despite the lowest usage across Asia.* 61% of respondents say they will consider using robo advisors in future, while only 24% have used it.

In which areas do robo advisors prevail over humans? *Convenience and cheaper fees are seen as key advantages of robo advisors.* For 57% of respondents, greater convenience is a differentiating factor, while 55% perceive robo advisors to command cheaper fees. In Indonesia, robo advisors are perceived to offer higher returns in the long run (54%) compared to human advisors.
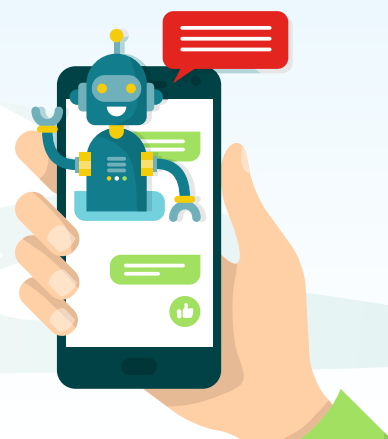
SELF-DRIVING CARS

Also known as autonomous cars or driverless cars, self-driving cars or vehicles use AI and a combination of other technologies such as light detection, sensors, GPS, radars and cameras to navigate between destinations without the need for human intervention.

Self-driving cars have the highest awareness (82%) for all AI applications among Asian consumers. This is likely due to tech companies such as Google, Tesla and Uber, who regularly make news headlines for their forays into this arena. *Singapore sees the highest awareness (93%) of self-driving cars,* which may also be in part to a nationwide push for innovation by the government that has seen real-life driverless car trials in the country.

Asian consumers generally lack mainstream access to driverless cars, making usage low. Only 9% of respondents have used or interacted with a self-driving car. *However, they show a keen interest.* Given the opportunity, 62% of respondents across all markets would consider using a self-driving car in future. Compared to most of Asia, *Hong Kong is the least won over by self-driving cars.* Only 36% – about half that of all other markets – of consumers in Hong Kong are open to using driverless cars.

Most respondents would pick a human driver (48%) to take them to their destination versus a driverless car (16%). *Asian consumers generally trust human car drivers over AI. India and Thailand are the most receptive towards self-driving cars.* 22% of respondents in India and 21% of respondents in Thailand would trust a driverless car take them to their destination.

AI is seen to have some advantages over humans in self-driving cars, however. *Accuracy and smooth rides are Asian consumers' top reasons for choosing driverless cars.* 58% cite accuracy in navigating journeys, while 49% say smoother rides are what self-driving cars can do better in, compared to rides delivered by human drivers. *Safety concerns and cost are the biggest barriers to adoption.* Human car drivers are most relied on to get consumers to their destination faster (59%), deliver safer rides with a lower risk of accidents (54%) and to charge cheaper fares (54%).

CONTENT RECOMMENDATION ENGINES

A combination of algorithms and AI is used by content recommendation engines to predict and recommend content to the user based on viewing history, past purchases and content ratings, as well as what other people similar to the user have viewed or rated.

With only moderate awareness of content recommendation engines, *Asian consumers may be underestimating their use of casual AI.* Only two in three (67%) are aware of content recommendation engines, suggesting they may not be aware of the ubiquity of AI embedded into their everyday lives, and possibly impacting their taste preferences and purchase decisions.

However, 87% would like content to be recommended to them. *Asian consumers trust AI over humans to recommend content to them.* 29% would pick content recommendation engines over humans, while 24% prefer humans.

Consideration is highest in Thailand and lowest in Hong Kong. 93% of Thai consumers will consider content recommendations, while only 77% of consumers in Hong Kong demand it.

Where AI loses out in consumer preferences to content recommendations, are to other humans who are known by consumers on a person-to-person level. *Asian consumers see family members and friends as superior to AI for understanding their personal taste and moods.* 52% of respondents think AI does not understand their taste in music as well as family members and friends, while 54% think their family members and friends can make better recommendations based on their mood. *Malaysian consumers, however, feel AI understands their taste in content.* It is the only market where more respondents perceive AI as being better in understanding their taste in music (57%), and in making better recommendations based on their mood (54%), than their friends and family members can.

CHATBOTS

Typically deployed on websites or messaging apps, chatbots are AI-enabled computer programs that simulate conversational exchanges with people.

Asian consumers have moderately high awareness of chatbots, but are less open to using one. 68% are aware of chatbots but only 53% are open to using a chatbot in future.

Consumers in Singapore (82%) and the Philippines (78%) are the most aware of chatbots. Chatbots therefore have much room for improvement in the way of closely imitating real human speech with natural language processing and conversational abilities especially in these markets, where consumers may be more savvy about chatbots.

Asian consumers prefer humans over chatbots. 53% of respondents say they would trust a human to help them with resolving their issues through the chat, but only 13% say they would trust a chatbot to do so. In India, chatbots see the lowest awareness (56%), though there is moderately high consideration (63%).

Can companies convince consumers that chatbots are effective? More than likely, yes. *Most Asian consumers prefer chatbots for quicker responses (64%) and safe-keeping of personal information (53%).* But 73% are reluctant to turn to chatbots to provide the answers they are looking for, while 85% trust humans to better understand their issues. *Humans remain trusted over AI for their ability to understand and provide real answers.*

PRODUCT RECOMMENDATION ENGINES

Akin to content recommendation engines, a combination of algorithms and AI is used to predict products or brands based on the user's browsing history and past purchases.

There is moderately high awareness of AI-powered product recommendations among Asian consumers, despite the real-life pervasiveness of this AI application. ***Two in five Asian consumers are not aware of product recommendation engines.*** Only 63% are aware. As with content recommendation engines, moderate awareness of production recommendation engines suggests that ***Asian consumers are not aware that they are already passive users of AI in their everyday lives.***

82% of respondents would like to have AI recommend products to them. ***Consideration of product recommendations via AI is high.*** However, Hong Kong and Singapore see a slightly less enthusiastic response, as only 67% and 74% of respondents respectively are open to product recommendations from AI.

Similar to content recommendations, Asian consumers trust family members and friends over AI to make better product recommendations for them. ***Asian consumers are not quite convinced that AI can understand their product preferences as much as their family members and friends.*** 33% prefer family members and friends to recommend products, compared to 21% who would prefer AI to do so. ***However, Thai consumers prefer AI over humans to recommend products.*** Thailand is the only market where more respondents trust AI (31%) to make product recommendations for them over their own family members and friends (29%). This appears to be driven by the perception that AI can help them to save money by recommending products within their budget (54%).

Knowledge of shopping taste and personal preferences are key drivers for trusting family and friends more than AI. 66% of respondents trust family members and friends to know their taste in shopping better than AI does; 63% also think they can give better personalised recommendations compared to AI.

VOICE ASSISTANTS

Akin to a personal assistant, AI-enabled voice assistants are usually embedded as a service in mobile devices such as smartphones and tablets, as well as other smart devices such as speakers. Voice assistants are typically activated by mentioning a keyword or phrase. Some – such as the voice assistants in the likes of Amazon Echo and Google Home – can help the user to control appliances in a smart home.

Voice assistants are largely known in Asia. Out of the six surveyed AI applications, voice assistants rank the second highest for awareness among Asian consumers. 81% of Asian consumers are aware of AI-powered voice assistants. *While consideration is high, it varies across markets.* 74% of all Asian consumers are open to interacting with voice assistants, but it ranges from its lowest at 58% in Hong Kong to its highest at 87% in Thailand. *India has the highest usage (68%) of voice assistants, as well as high consideration (83%).*

When it comes to relatively complex tasks, Asian consumers tend to trust themselves to execute these over AI. *Asian consumers are not quite ready to let AI take the reins in managing their personal lives.* This is especially so where interaction with other humans is involved, such as sending messages to friends or family members (53%) and booking an appointment with the hairstylist or barber (42%). *Voice assistants are trusted to perform only simple tasks.* Asian consumers tend to turn to their voice assistants for just executing simple, rudimentary tasks such as scheduling morning alarms (46%), setting calendar reminders for bill payments (44%) and controlling IoT appliances in smart homes (35%).

UNLOCKING AI IN THE WORKPLACE

As many as 375 million workers globally, or 14% of the global workforce, are likely to need to reskill or make a transition to new occupational categories[3]. A difficult transition to new jobs can lead to rising unemployment and sluggish wage growth.

With AI and automation opening up new levels of productivity, the nature of employment in the human labour market is poised to change. Jobs are likely to change and various roles and industries are likely to be impacted. However, the revolution looks set to also spawn new kinds of work that involve creativity, collaboration and complex problem-solving. CEOs and business have a vital role to play in helping people to adapt to the changing nature of work by training them for the jobs of tomorrow. For the future workforce, talent development, lifelong learning, and career reinvention will be extremely critical.

Which begs the question: are Asian consumers willing to embrace changes in the workplace of the future? How do they perceive AI to affect their employment, if at all? Will they upskill themselves in the new workplace of the future? In short, are they ready for AI?

Most Asian consumers think AI will lead to better job opportunities. 63% say AI will give them "freedom for better and more interesting jobs".

This is the most agreed-with statement across all markets that best describes respondents' thoughts about AI's impact on the workplace. ***However, they are less ready for AI in the workplace.*** Only 18% are ready for the changes that AI will bring to the workplace.

One in five Asian consumers think AI will take away their jobs. 20% of respondents agree with the statement that "AI will put me out of a job". ***Singapore and Hong Kong are the most pessimistic.*** About three in 10 respondents (29%) from both Singapore and Hong Kong markets – the highest in all surveyed markets – resonate with the view that AI will take their jobs away. ***Indonesia is the most indifferent about AI's impact on jobs.*** One in four respondents (24%) do not perceive any AI disruption in their employment. This is much higher than the regional average of 17% who do not think AI will affect their jobs.

Most Asian consumers see upskilling as necessary, and are willing to do so. Across all surveyed markets, the majority (58%) see the need to upgrade their skills in preparation, and are ready to do so. ***Consumers in Hong Kong are the most unwilling to upskill.*** Out of all the markets, consumers in Hong Kong show the most reluctance about reskilling. 45% are not willing to upskill themselves, including 11% who do not believe any amount of training or courses will prepare them for AI in the workplace.

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3 McKinsey Global Institute, "Jobs Lost, Jobs Gained: Workforce Transitions in a Time of Automation", January 2017

TRUST AND DATA: COMPANIES CAN DO BETTER

When it comes to trust, having an open and transparent relationship is paramount to any business, whether with customers, partners and community. 56% of people have no respect for CEOs who remain silent on important issues[4].

As new data regulations such as GDPR are implemented worldwide, businesses must exercise responsibility with customer data. In Asia, a growing awareness of consumer rights surrounding the data they share with businesses means that companies have to be open and transparent about how they are using and protecting customer data.

Our research found Asian consumers are generally dissatisfied about the way their data is handled by businesses. The majority of respondents feel that companies keep them in the dark about how their data is used (69%) and do not give them control over the data that they share with them (67%).

Most Asian consumers trust companies to keep their data secure. Despite most consumers' dissatisfaction with a lack of transparency by companies in how they handle their transparenttrustdata, 67% of respondents feel that companies generally have sufficient security measures in place to keep their data secure.

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4 Edelman, "Trust Barometer", 2018

Compared to the rest of Asia, Singaporean consumers appear to have higher standards for how companies treat their data. *Singaporean consumers are most dissatisfied with how their data is handled by businesses.* 83% feel they are kept in the dark about how companies use their data and 80% feel they are not given control over the data that they share with companies. Only 53% feel that companies have enough security measures in place for safe-keeping of the data that they share with them.

Less than three in 10 Asians (27%) say businesses are doing a good job of educating consumers about AI. *Businesses need to do better to educate Asian consumers about AI and its potential impacts.*

BUSINESSES ARE BUILT ON TRUST: THREE ACTIONABLE TAKEAWAYS FOR CEOS

1. Lead the Way. The workplace of the future isn't going away. Businesses have a role to play in helping prepare its people and society for the impacts technology will have on the way we work, do business and conduct our lives. Businesses need to take an active role in making sure they are educating and helping to re-skill people for the jobs of the future.

2. Be transparent. All stakeholders from policymakers to business leaders must come together as a collective to manage technology securely and be open about their data practices. Being accountable is the only way forward.

3. Be customer-obsessed. Being customer-first is crucial for businesses to succeed in the Fourth Industrial Revolution. With evolving technologies raising the bar higher for customer experience, consumers now expect swift, personalised service. Investing in CRM solutions with advanced AI capabilities can help businesses anticipate customer needs with personalised support.

KEY DEFINITIONS

The following contains definitions of terms used throughout this White Paper:

Artificial Intelligence (AI) refers to intelligent machines or systems that can learn and perform tasks independently of human intervention, such as visual perception, speech recognition, decision-making and language translation.

Robo advisors refer to digital AI platforms that provide automated, algorithm-driven financial planning services. Robo advisors are a type of AI applications.

Self-driving cars refer to autonomous or driverless vehicles that use AI and a combination of other technologies such as light detection, sensors, GPS, radars and cameras to navigate between destinations without the need for human intervention. Self-driving cars are a type of AI applications.

Content recommendation engines refer to online filtering systems that use a combination of algorithms and AI to predict and recommend content to the user. Content recommendation engines are a type of AI applications.

Chatbots refer to AI-enabled computer programs that simulate conversational exchanges with humans. Chatbots are a type of AI applications.

Product recommendation engines refer to online filtering systems that use a combination of algorithms and AI to predict and recommend products to the user. Product recommendation engines are a type of AI applications.

Voice Assistants refer to AI-enabled voice services that aid the user in executing tasks, such as controlling appliances in a smart home. Voice assistants are a type of AI applications.

QUESTIONNAIRE

AI FAMILIARITY AND UNDERSTANDING

- Prior to this survey, were you aware of Artificial Intelligence (AI)?
- Prior to this survey, how would you have rated your level of understanding of AI?

AI OUTLOOK

- What is your general feeling towards AI?
- Thinking about the present, do you think AI is currently improving your life/the world?
- Thinking about the future, do you think AI can/will improve your life/the world?
- How do you think AI will positively impact the world, if at all? Select all that apply.
- How do you think AI will negatively impact the world, if at all? Select all that apply.

AI USAGE & TRUST

ROBO ADVISORS
- Have you heard of robo advisors before?
- Have you ever used robo advisors before?
- Would you consider using robo advisors in the future?
- If you had to pick, who would you trust to manage your wealth?
- Who/which do you think..

SELF-DRIVING CARS
- Have you heard of autonomous cars before?
- Have you ever used an autonomous car before?
- Would you consider using an autonomous car in the future?
- If you had to pick, who would you trust to bring you to your destination?
- Who/which do you think...

CONTENT RECOMMENDATION ENGINES
- Have you heard of content recommendation engines before?
- If given a choice, would you like content to be recommended to you?
- Thinking about the content that has been recommended to you by content recommendation engines, how relevant have they been?
- If you had to pick, who would you trust to recommend you music content?
- Imagine sharing your top 50 favourite songs with a friend/family member and a content recommendation engine. Between those two, who/which do you think...

CHATBOTS
- Have you heard of chatbots before?
- Have you ever interacted with chatbots before?
- Would you actively choose to interact with chatbots in the future?
- If you had to pick, who would you trust to help you with an issue?
- Who/which do you think..

PRODUCT RECOMMENDATION ENGINES

- Have you heard of product recommendations engines before?

- If given a choice, would you like products to be recommended to you?

- Thinking about the products that have been recommended to you by product recommendation engines, how relevant have they been?

- If you had to pick, who would you trust to recommend you products?

- Imagine sharing your preferences with a friend/family member and a product recommendation engine. Between those two, who/which do you think...

VOICE ASSISTANTS

- Have you heard of voice assistants before?

- Have you ever used voice assistants?

- Would you consider using a voice assistant in the future?

- If you had to pick between yourself and a voice assistant, who would you trust to...

MISCELLANEOUS

- If you had to choose, which of the following statements do you think best describes your thoughts on AI?

- Imagine if AI was being implemented in your workplace tomorrow. Which, if any, of the following will best describe your response?

- Which of the following statements best applies to you?

- How well, if at all, do you think businesses are educating consumers about AI?

- Do you agree or disagree with the following statements?

- I feel that companies...Keep me in the dark about how they use my data
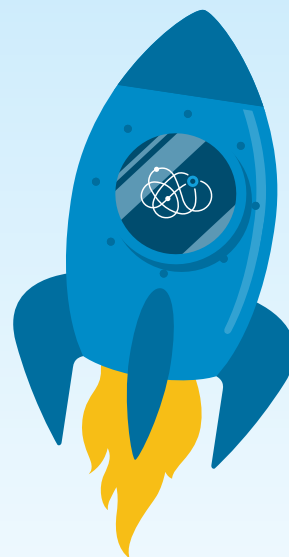
METHODOLOGY

To understand consumer attitudes and trust towards artificial intelligence in Asia, Salesforce commissioned YouGov to conduct a research study across the seven markets of Singapore, India, Hong Kong, Malaysia, Thailand, the Philippines, and Indonesia. A total of 7,092 respondents were recruited via YouGov's proprietary panel, and quota sampling was used to ensure that all collected data were representative of the internet population for each market. The survey took place over a ten-day field period in July 2018. For more details about the online representative audience in each country and survey questionnaire, please refer to the Appendix.

ABOUT YOUGOV

YouGov is driven by a simple idea: the more people are able to participate in the decisions made by the institutions that serve them, the better those decisions will be. At the heart of the company is a global online community where millions of people and thousands of organisations engage in conversations about their beliefs, behaviours and brands. It combines this continuous stream of data with deep research expertise and broad industry experience, to develop technologies and methodologies for collaborative decision-making.

ABOUT SALESFORCE

Salesforce is the world's #1 CRM platform that is bringing artificial intelligence to every company. Named as Forbes' "Innovator of the Decade" in 2016 and on Fortune's "World's Most Admired Companies" list for six consecutive years since 2013, Salesforce's dedication to helping businesses succeed has made it the 4th-largest software company in the world. In 2016, it launched Einstein, the world's only comprehensive AI for CRM, to help AI-first companies become get smarter and more predictive about their customers.