salesforce

SEVENTH EDITION

State of the
AI Connected
Customer

Insights from 16,585 consumers and
business buyers on expectations
and trust in the age of AI and agents

A Letter from Salesforce's Chief Ethical & Humane Use Officer

Paula Goldman

EVP, Chief Ethical & Humane Use Officer, Salesforce

As we enter the agentic AI era, businesses and customers alike face remarkable opportunities and new responsibilities. AI has evolved beyond generating insights to taking meaningful actions, requiring companies to center their AI transformations in trust. Informed by over 16,500 voices, our "State of the AI Connected Customer" report – the seventh edition of Salesforce's connected customer study – highlights a strong call for trustworthy AI that balances innovation with clarity, privacy, and accountability.

At Salesforce, we believe trusted AI is about earning human confidence, not just technical precision. We are committed to fostering an AI ecosystem grounded in transparency and ethical practices. Forty-two percent of customers trust businesses to use AI ethically – down from 58% in 2023. In this moment of rapid change, companies have an essential opportunity to build trust through secure, thoughtful AI applications. While AI's potential is vast, its highest purpose is realized when it enhances – rather than replaces – the unique judgment, creativity, and empathy that only people can provide.

This is a pivotal time for shaping the future of AI. As AI agents and new use cases gain momentum, leaders must ensure it is done in partnership with people. We hope you find this research helpful and invite you to join us in creating a world where AI agents are both transformative and trustworthy, keeping humanity at the heart of technological progress.

Humans and AI drive customer success, together.

What You'll Find in This Report

For the "State of the AI-Connected Customer" report – the seventh edition of Salesforce's connected customer study – we surveyed 15,015 consumers and 1,570 business buyers worldwide to discover:

- How increasing and evolving uses of artificial intelligence (AI), including generative AI and autonomous agents, are shaping customer sentiment, expectations, and behaviors
- What brands must do to earn and maintain customer trust amid shifting market dynamics

Due to rounding, not all percentage totals in this report equal 100%. All comparison calculations are made from total numbers (not rounded numbers).

Data in this report is from a double-blind survey conducted from July 26, 2024, through August 20, 2024. Respondents represent 18 countries across six continents. All respondents are third-party panelists. For further survey demographics, see page 24.

Salesforce Research provides data-driven insights to help businesses transform how they drive customer success. Browse all reports at salesforce.com/research.

In this report, we examine survey results from three primary groups:
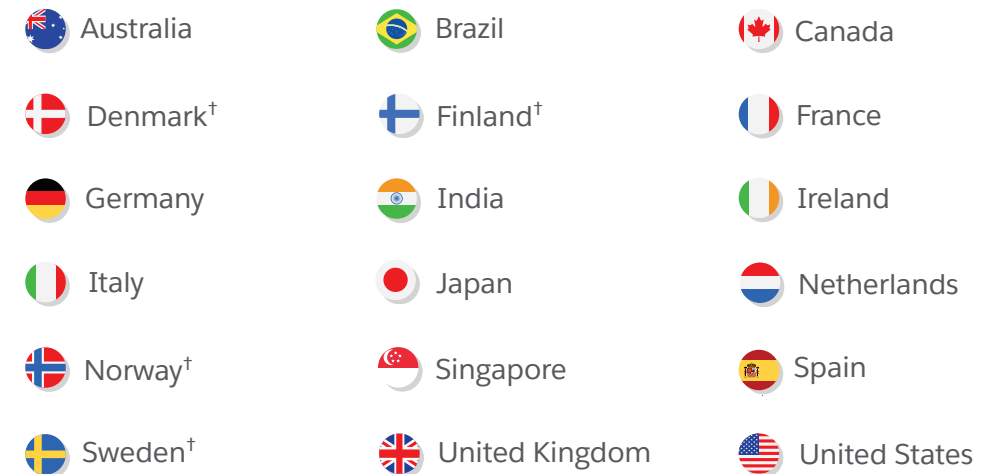
Consumers
Those reporting their interactions with companies when purchasing for themselves.

Business Buyers
Those reporting their interactions with companies when purchasing on behalf of their employers.

Customers
Aggregated consumers and business buyers.

Australia	Brazil	Canada
Denmark[†]	Finland[†]	France
Germany	India	Ireland
Italy	Japan	Netherlands
Norway[†]	Singapore	Spain
Sweden[†]	United Kingdom	United States

1,570 business buyers surveyed worldwide

15,015 consumers surveyed worldwide

[†]Single Sample Group   Flag icons: Getty Images

Contents

Executive Summary

AI is reshaping every aspect of the customer experience, sparking both enthusiasm and apprehension. And as AI agents start to become mainstream, that transformation will accelerate. While business buyers are more receptive to AI's value, consumers remain hesitant. Sticking points include ensuring control over customer data and wariness around AI's role in more complex tasks.

To build trust with AI and garner broader support as adoption scales, customers ask for transparency, control, and clear guardrails that include humans in the loop.

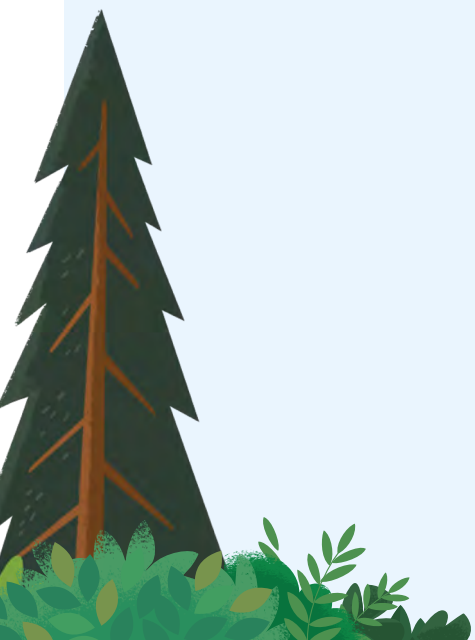## 01 Personalization Jumps While Privacy Concerns Intensify

Economic and technological shifts are reshaping customer expectations around privacy, personalization, and value. Brands are doing a better job treating customers as individuals, but customers don't always feel a fair exchange of value after providing brands with their personal information. **Seventy-three percent of customers feel brands treat them as unique individuals, up from 39% in 2023, but only 49% feel brands use their information in a beneficial way.**

02 AI Raises the Stakes in Pursuit of Trust

Expectations and market dynamics are amplifying the need for brands to earn and maintain customer trust, with fair pricing, consistent quality, and data protection being top priorities. Yet trust in companies is on the decline. The race is on to harness AI responsibly and differentiate value through trust. **Only 42% of customers trust businesses to use AI ethically, down from 58% in 2023.**

03 A Path Toward a Trusted Agentic Future Emerges

As AI evolves, comfort with the technology, including autonomous use cases, is at an inflection point. While business buyers are more open to collaborating with AI for efficiency than consumers, both groups generally prefer human expertise for complex, high-stakes tasks, and transparency and easy human involvement are crucial for building trust. **Seventy-two percent of customers believe it's important to know when they are communicating with an AI agent.**

01

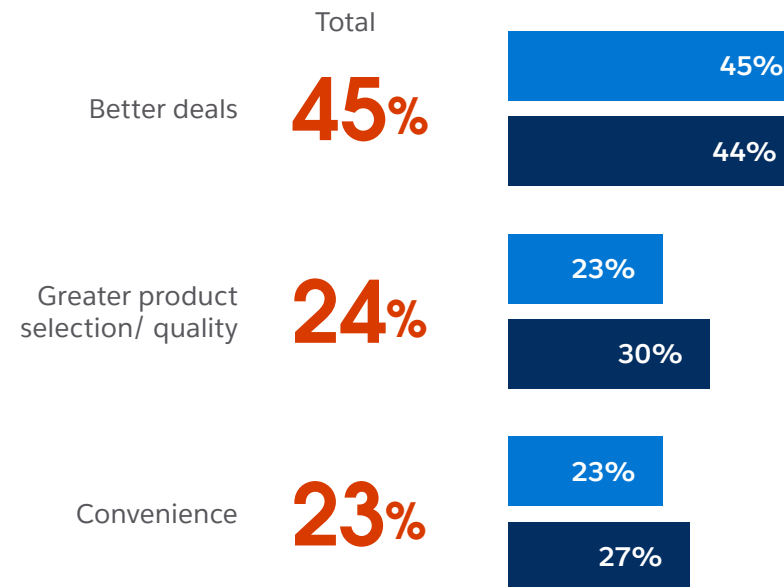# Personalization Jumps While Privacy Concerns Intensify
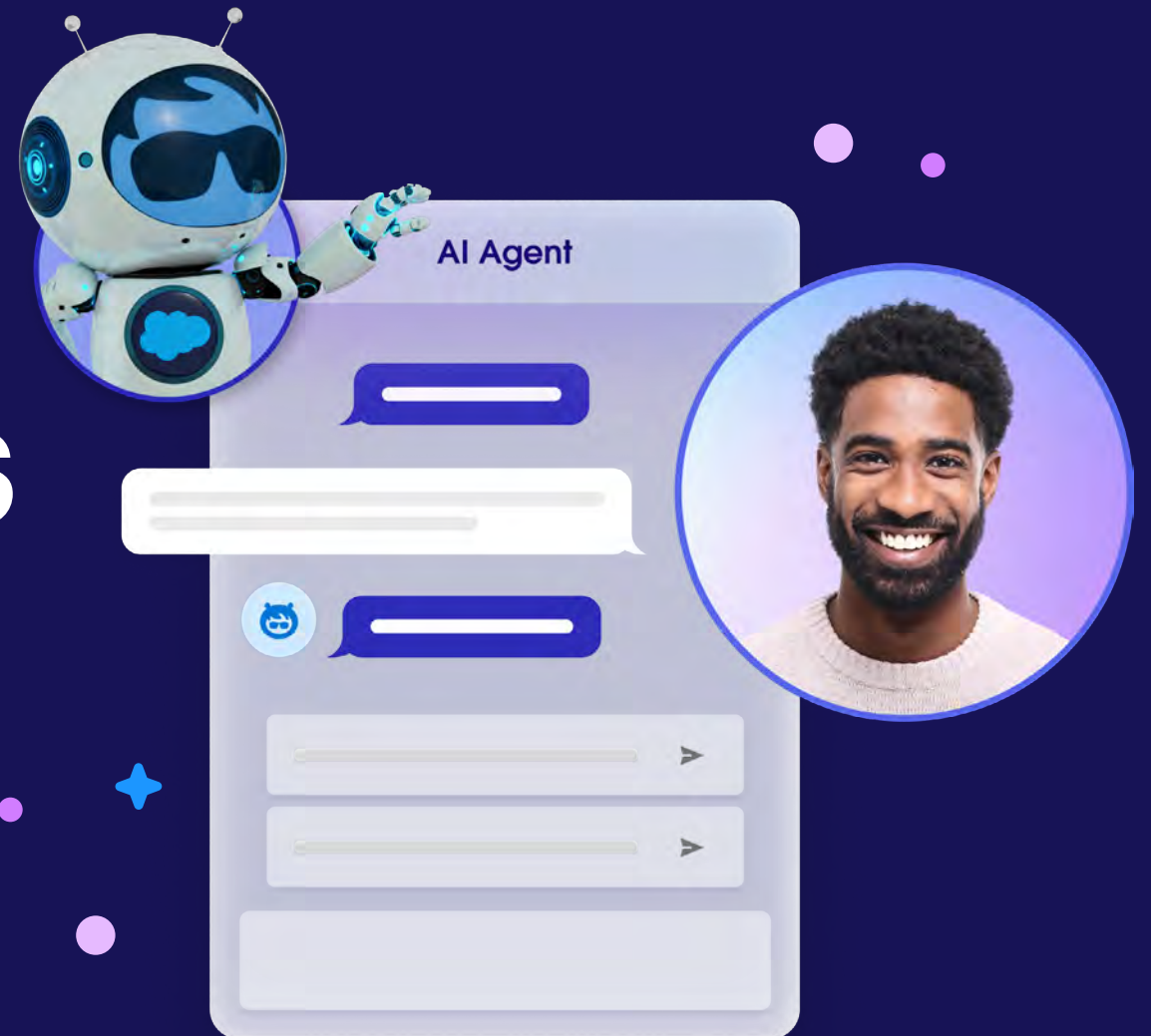
01

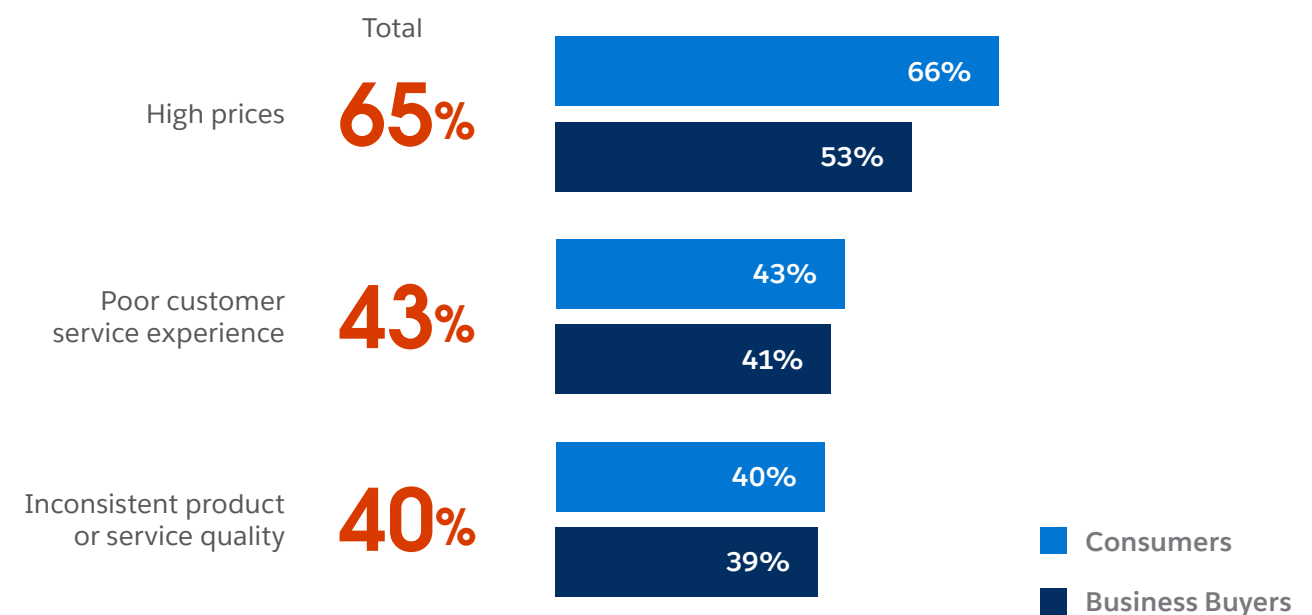# Affordability Isn't the Only Loyalty Driver

The [Salesforce 2024 Holiday Forecast](#) reveals that consumers are carrying more debt and plan to buy less this year. This, combined with inflation and other dynamics, underscore the importance of value as a key loyalty driver. However, it's not the only consideration. Many customers also place high importance on personalized engagement and great customer service. In fact, poor customer service is the second most common reason customers stop buying from a brand. In other words, brands that focus on affordability at the expense of experience are paying attention to only part of the equation.

Price Is the Primary Draw – or Deal Breaker – for Customers

Top Reasons Customers Tried a New Brand in the Last Year

Total

Better deals — **45%**
- Consumers: 45%
- Business Buyers: 44%

Greater product selection/ quality — **24%**
- Consumers: 23%
- Business Buyers: 30%

Convenience — **23%**
- Consumers: 23%
- Business Buyers: 27%

Top Reasons Customers Stopped Buying from a Brand in the Last Year

Total

High prices — **65%**
- Consumers: 66%
- Business Buyers: 53%

Poor customer service experience — **43%**
- Consumers: 43%
- Business Buyers: 41%

Inconsistent product or service quality — **40%**
- Consumers: 40%
- Business Buyers: 39%
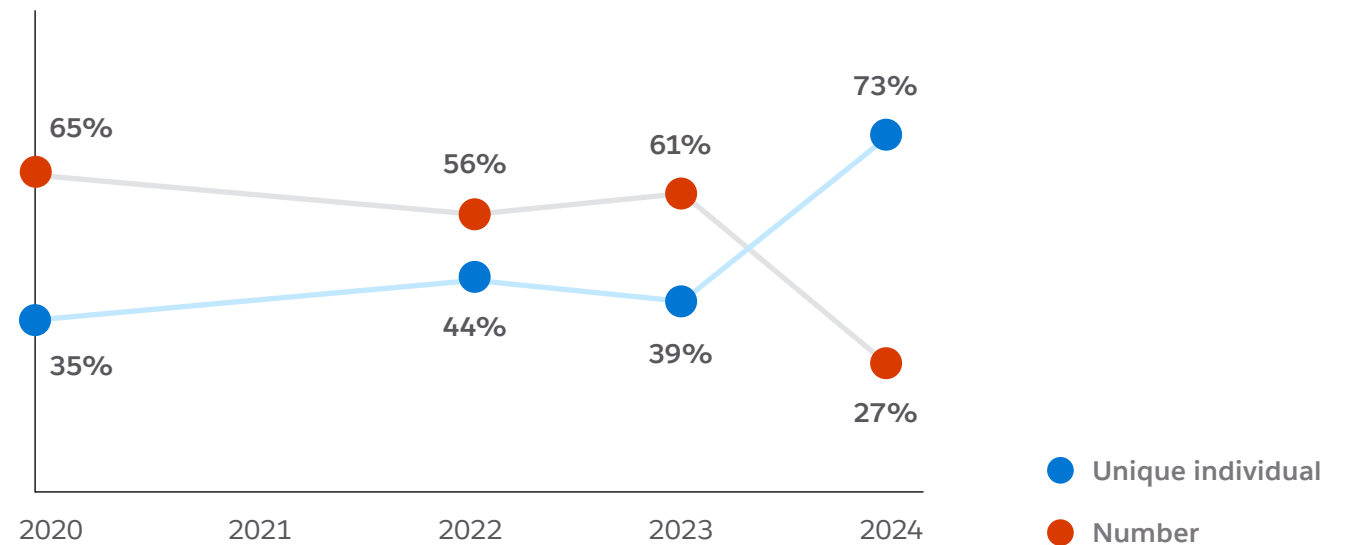
■ Consumers
■ Business Buyers

01

Personalization Impresses While Data Caution Rises

Customers today demand a fair trade-off between the personal data they share and the value they receive. The balance between personalization and privacy has always been delicate, but now the stakes are higher. On one hand, the percentage of customers feeling treated like unique individuals soared from 39% in 2023 to 73% in 2024. However, customers are also more protective of their data and seeking greater returns from it.
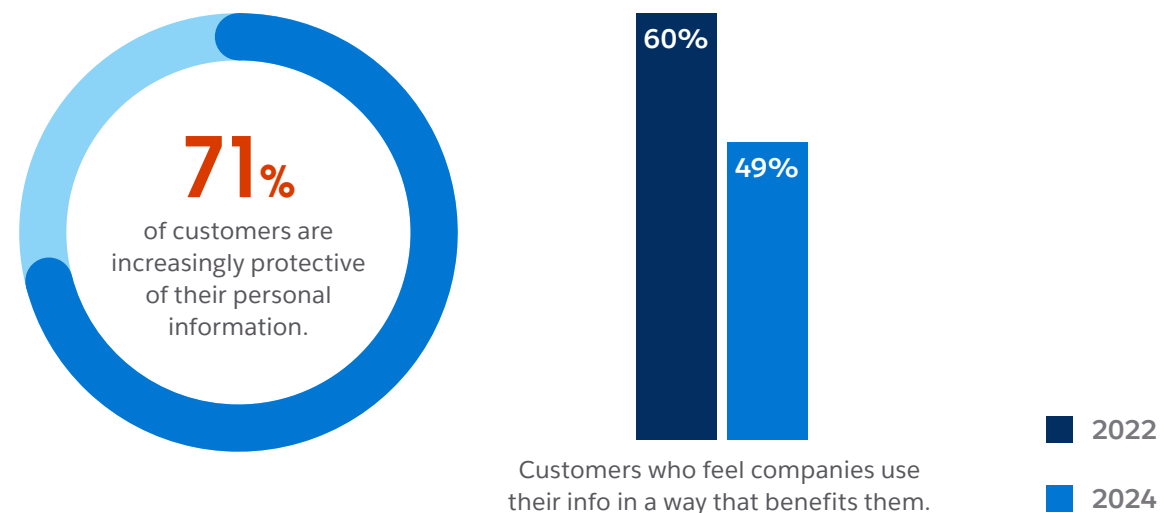
Forty-nine percent of customers think companies use their data to their advantage — down from 60% in 2022.

Personalization Has Hit an Inflection Point

Which statement do you agree with more: "Most companies treat me as a unique individual" or "Most companies treat me as a number?"

	2020	2021	2022	2023	2024
Number	65%		56%	61%	27%
Unique individual	35%		44%	39%	73%

● Unique individual
● Number

At the Same Time, Privacy Concerns Grow

71% of customers are increasingly protective of their personal information.

60%
49%

Customers who feel companies use their info in a way that benefits them.

■ 2022
■ 2024

02

AI Raises the Stakes in Pursuit of Trust

02

A Temperature Check on Customer Trust

Trust in companies has plummeted after years of stability, likely in part due to factors like increased awareness of data usage and breaches, concerns over transparency, and the effects of inflation. This growing skepticism toward corporate transparency and ethics is a call for brands to work harder to demonstrate their commitment to fairness, quality, and data protection to rebuild trust with informed and discerning customers.

Sixty-four percent of customers believe companies are reckless with customer data.

To build trust, fair pricing is the top concern, but ensuring service quality and protecting customer privacy and data are also key actions.
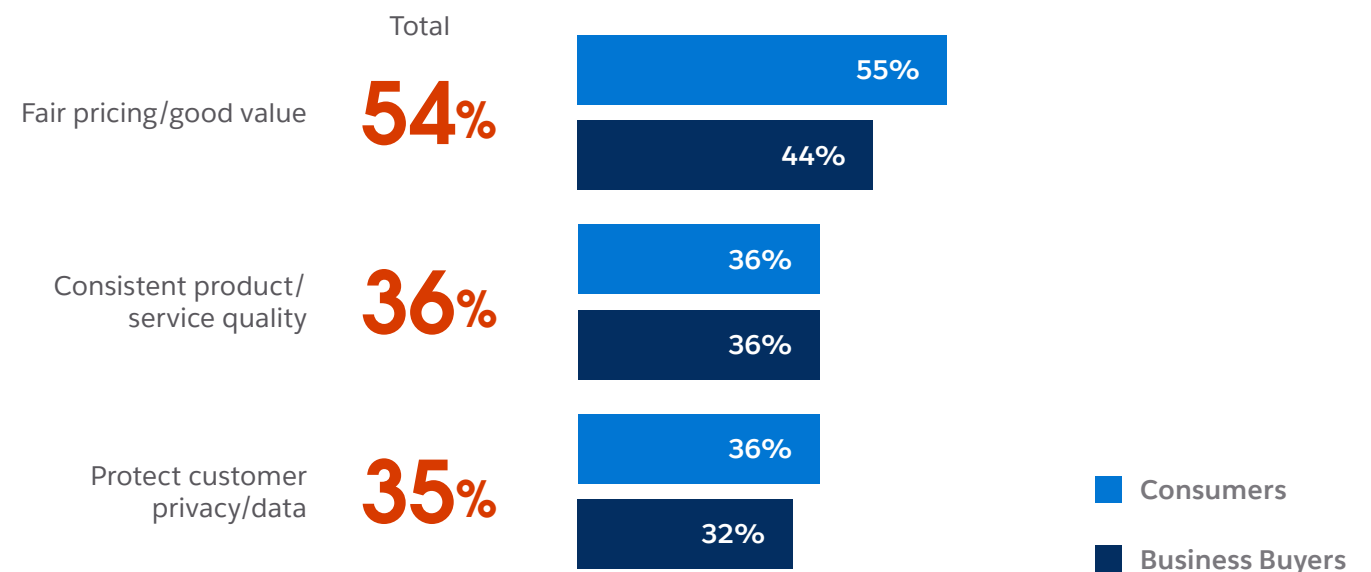
Trust Is on the Decline

Which statement do you agree with more: "I trust companies more than I did a year ago" or "I trust companies less than I did a year ago"?

- ● Trust more
- ● Trust less
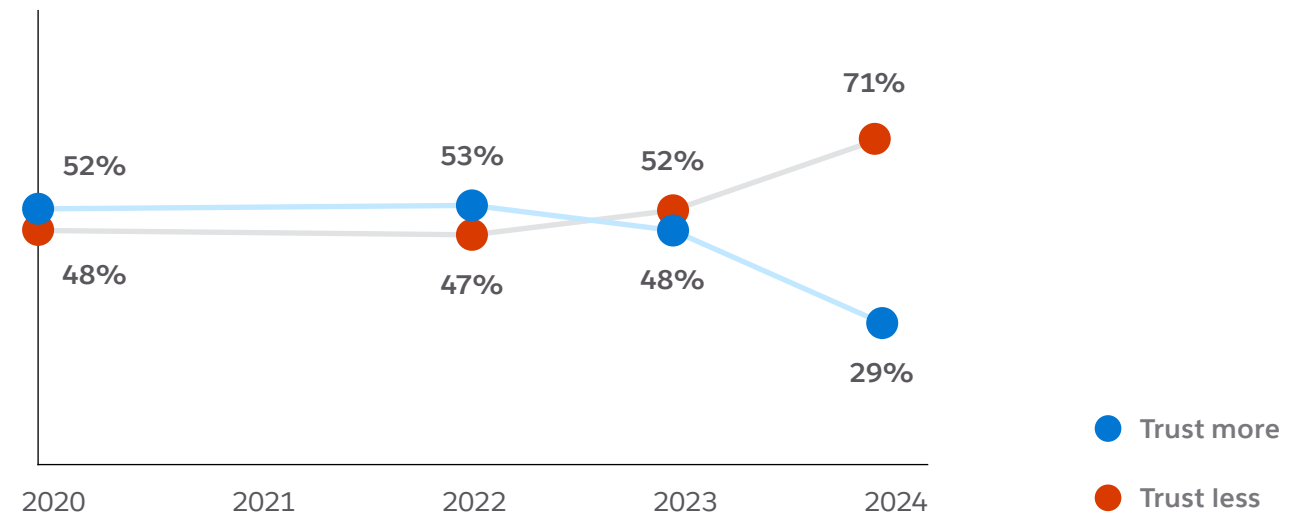
Building Trust Looks the Same for Business Buyers and Consumers

Top Actions Brands Can Take to Earn Customer Trust

	Total	Consumers	Business Buyers
Fair pricing/good value	**54%**	55%	44%
Consistent product/service quality	**36%**	36%	36%
Protect customer privacy/data	**35%**	36%	32%

- ■ Consumers
- ■ Business Buyers

02

AI Advancements Make Trust Even More Critical

As companies embrace the benefits of AI advancements like agents, 61% of customers stress it is even more important for companies to be trustworthy, yet less than half currently trust businesses to use AI ethically. This gap highlights a significant opportunity for companies to stand out by prioritizing transparency, fairness, and responsible AI practices.

Forty-two percent of customers trust businesses to use AI ethically.

Paralleling the growth of the technology and its adoption, concerns around the ethical use of AI have steadily risen since 2020. The percentage of customers who strongly agree they are concerned about unethical AI use has significantly increased from 22% to 37%, revealing heightening anxieties around AI misuse.

Trust and Ethics Are Front and Center

61%

of customers believe advancements in AI make it more important for companies to be trustworthy.

Extent Customers Agree They Have Concerns Over Unethical AI Use (2020–2024)

66%   72%   74%   73%

22%   28%   35%   37%

2020   2021   2022   2023   2024

● Net: agree   ● Strongly agree

02
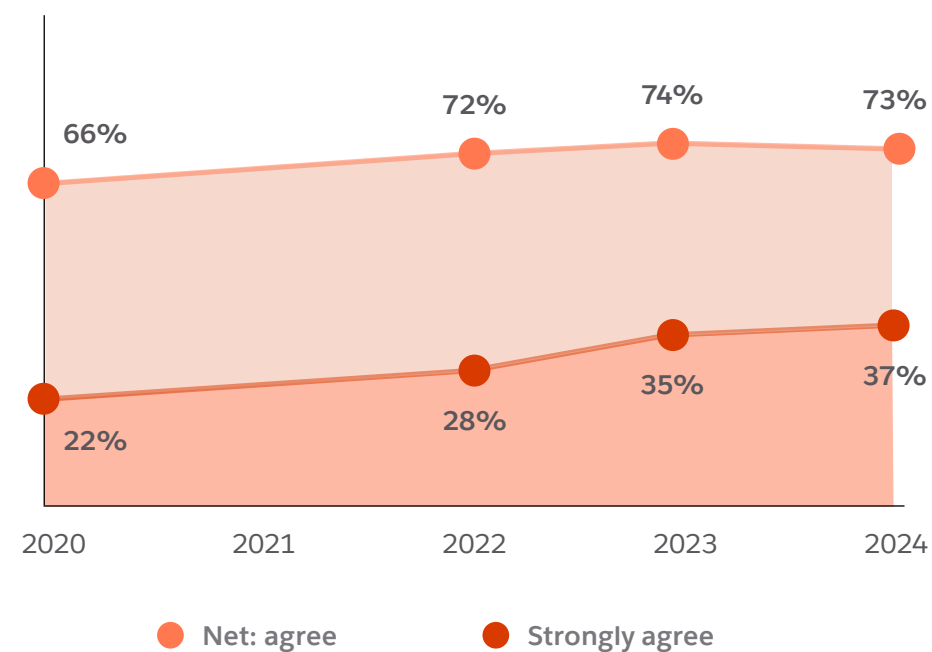
How Companies Use AI Can Make or Break Trust

Both business buyers and consumers agree on key tasks that build trust with AI, with transparency being the top priority. When users understand how AI is being used and the benefits it can create, they are more likely to trust the outcomes.
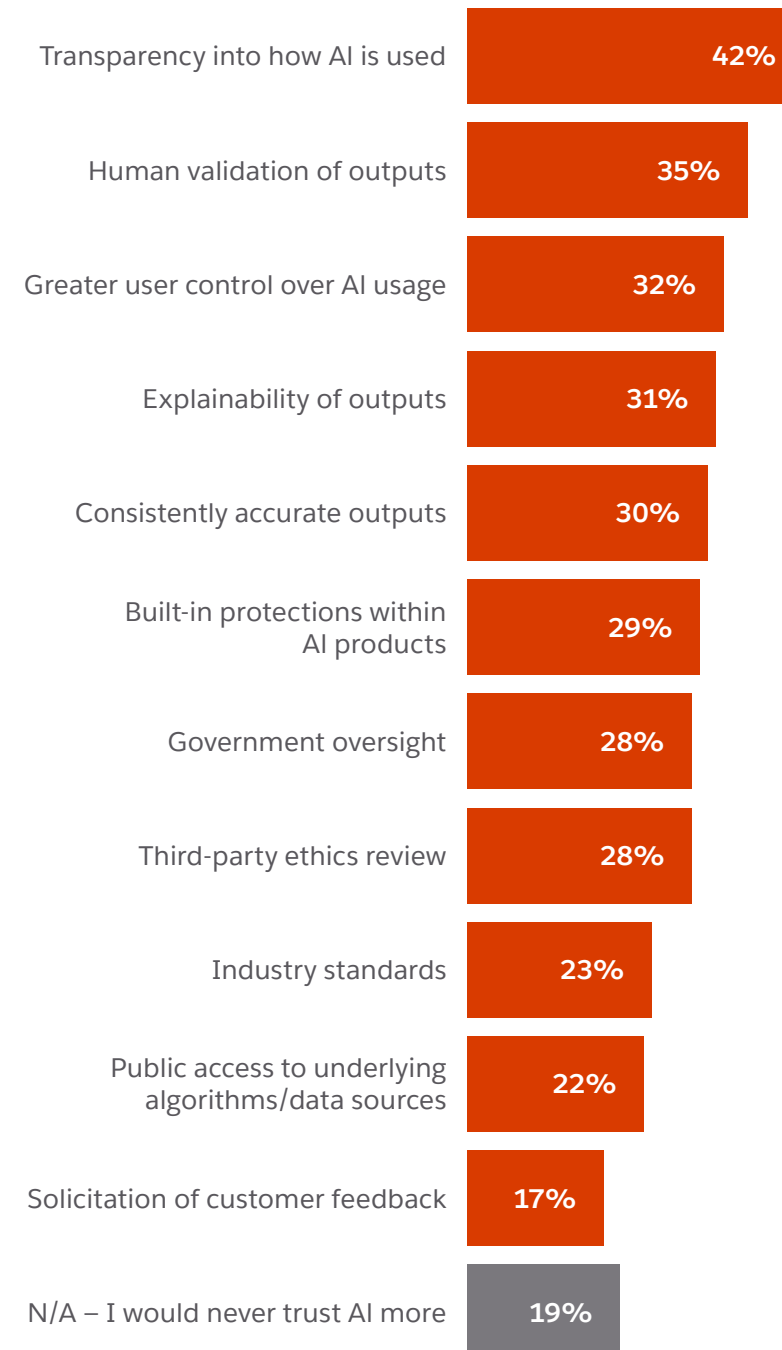
Several of these trust-building measures involve thoughtful collaboration between humans and AI systems. Actions may include the constant monitoring and optimization of AI outputs, easy paths for customers to engage with a human, and allowing users to report errors made by AI systems.

Seventy-one percent of customers believe it is important for a human to validate the output of AI.

Interestingly, while some trust-building tasks are more popular than others, none were chosen by a majority of respondents. This highlights that an "all of the above" approach is necessary to allay customer concerns.

The Foundations of Ethical, Trusted AI Practices

Factors That Would Increase Customers' Trust in AI

Factor	Percentage
Transparency into how AI is used	42%
Human validation of outputs	35%
Greater user control over AI usage	32%
Explainability of outputs	31%
Consistently accurate outputs	30%
Built-in protections within AI products	29%
Government oversight	28%
Third-party ethics review	28%
Industry standards	23%
Public access to underlying algorithms/data sources	22%
Solicitation of customer feedback	17%
N/A – I would never trust AI more	19%

Expert Perspective on Ethics in AI

What ethical considerations should be taken into account when designing AI systems that can make decisions or take action autonomously?

Agentic AI is not without risks. These risks aren't new, but as AI moves from generating content to taking action on our behalf, ensuring trustworthy AI is more important than ever. To keep trust at the forefront, our Office of Ethical and Humane Use developed a set of trusted AI principles that we continue to update, most recently with the five guiding principles for developing responsible generative AI, in order to guide the responsible development and deployment of AI here at Salesforce.

For this next evolution of agentic AI, we're focused on tools that allow people to lean in on the highest-risk, highest-judgment decisions – and delegate the rest. To be clear, this doesn't mean humans are in the loop of every AI output – that doesn't work anymore. Instead, we're focused on intentional design and system level controls that enable both humans and AI. For example, empowering humans to keep a bird's-eye view of their AI and enabling agentic AI to escalate to humans when necessary.

What kind of ethical frameworks or guidelines do you think are necessary for the responsible development and use of both generative and agentic AI?

Rob Katz
VP, Product Management,
Responsible Tech & AI, Salesforce

Establishing trust requires an all-company approach. We recommend developing standard guardrails, or "patterns," designed to improve safety, accuracy, and trust while empowering the human user. For us, that means partnering with product, engineering, and design teams, as well as legal, security, privacy, AI research, and our research and insights colleagues to implement trust patterns that help create trustworthy AI agents. Our latest set of patterns is designed to specifically ensure that our agentic AI solutions – including our latest innovation, Agentforce – are trustworthy, reliable, and transparent.
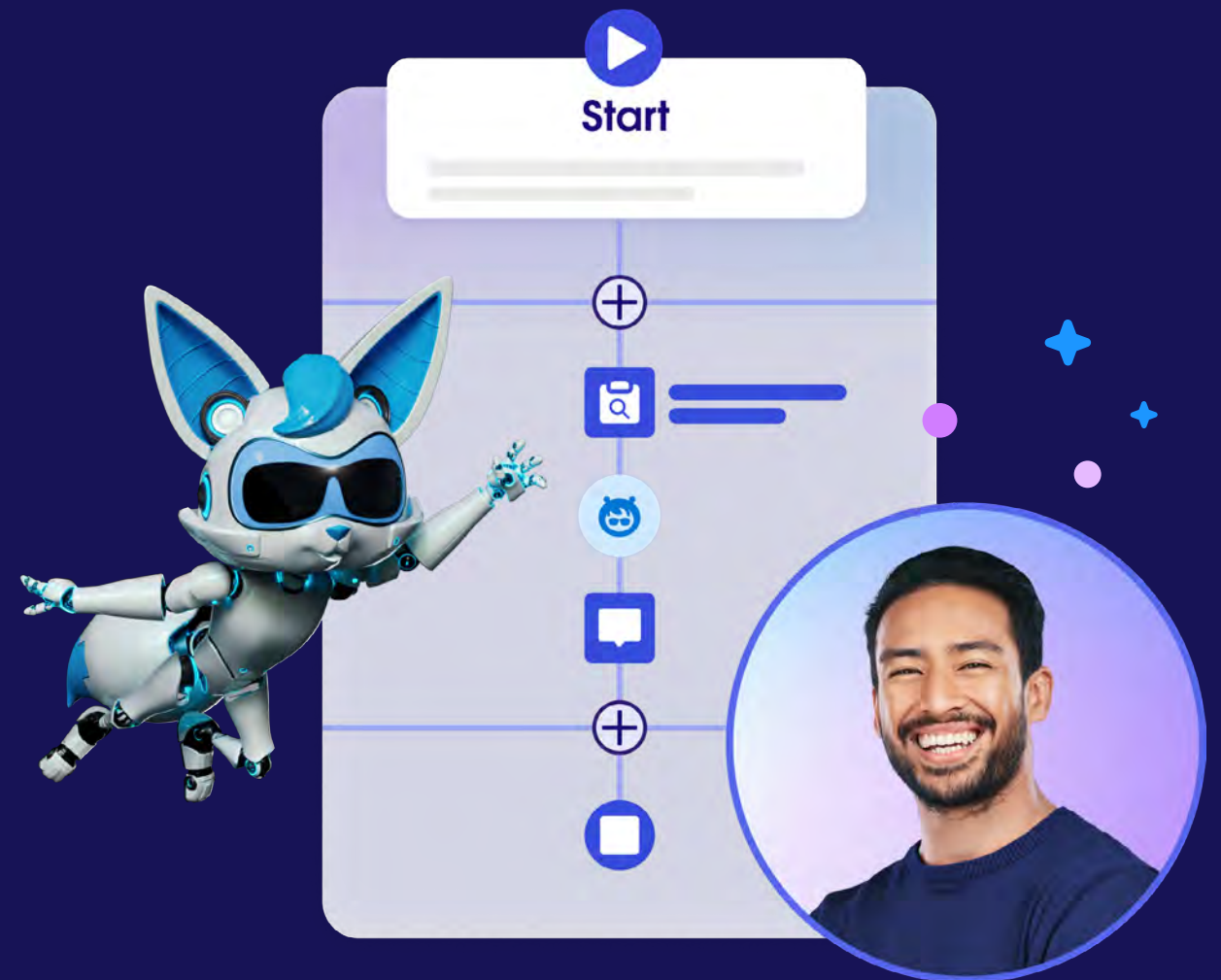
03

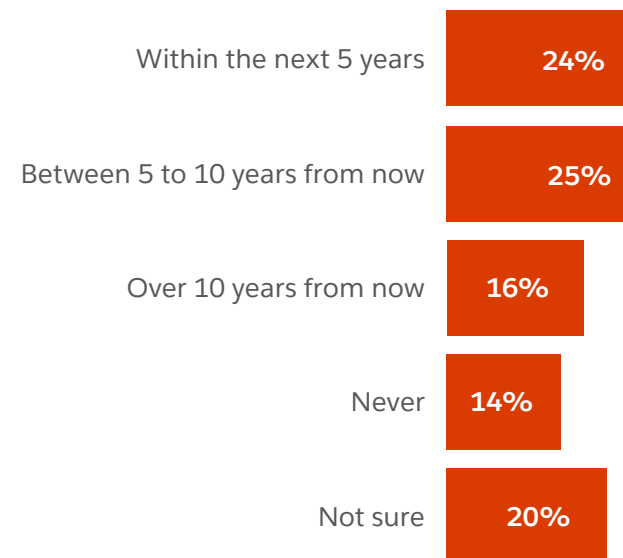# A Path Toward an Agentic Future Emerges

03

AI Is Advancing at a Rapid Clip

Customers see that AI is advancing at a blistering pace, with nearly half of respondents expecting AI to match human capabilities across a wide range of cognitive tasks within the next decade – and almost a quarter by 2029. This is supported by AI's current ability to perform many cognitive tasks, such as learning, logical reasoning, and decision-making, at varying levels of maturity, as well as rapid advancement in the field of artificial general intelligence (AGI), a type of AI that can learn and apply knowledge across tasks at a human level or beyond. As AI becomes more sophisticated, its potential to assist human workers across a wider variety of tasks increases.

Many Customers See AGI on the Horizon

When Customers Expect AI to Match Human Capabilities

Within the next 5 years	24%
Between 5 to 10 years from now	25%
Over 10 years from now	16%
Never	14%
Not sure	20%

03

Top AI Use Cases Center on Better, Faster Solutions

Half of customers are more optimistic about AI's potential to enhance product quality and deliver faster, more efficient service. Value is seen in streamlining processes and providing faster solutions, such as the benefit a customer can experience from engaging with an AI service agent that can respond to questions and resolve issues 24/7.

While they appreciate the convenience and efficiency that AI can offer, there is lingering concern about the extent to which AI should be involved in understanding their personal preferences and behaviors. Only 39% are comfortable with brands using AI to understand their needs. This is likely due to apprehension around data protection and privacy, but may also speak to satisfaction with current levels of personalization addressed in chapter one.

Consumers Are More Skeptical About AI's Impact and Potential

Customers Who Are Comfortable with the Following Uses of AI

To improve products	50%
To respond faster	49%
To resolve my issues faster	47%
To show more relevant info	47%
To better understand my needs	39%

Customers Who Agree with the Following Statement

AI raises the bar on customer experiences	40%

03

Businesses Welcome and Consumers Question AI Agents

Autonomous AI agents, which can answer questions, perform tasks, and take action on behalf of a person, are rapidly advancing in business and personal applications. Common agent use cases include 24/7 service agents that respond to common inquiries, sales agents that engage with prospects and schedule meetings, and personal assistants that can help with summarizing information, generating content, and providing recommendations to its users across a broad range of categories.
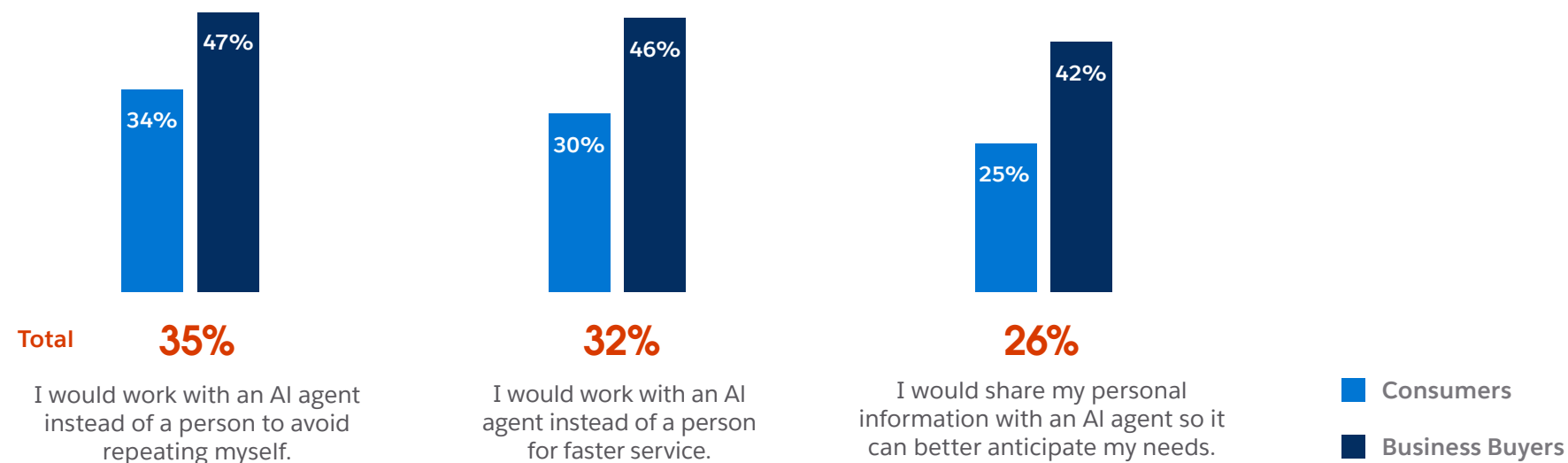
Nearly half of business buyers would work with autonomous agents for efficiency and personalization. Just one-third of consumers feel the same. Greater openness to working with AI agents may be linked to greater exposure working with AI in general. Fifty-four percent of global workers now trust humans and AI to collaborate on most tasks, emphasizing how important it is for businesses to deploy AI in a thoughtful, responsible way that builds user confidence.[1]

It should be noted that less than half of respondents agreed to the statements. This highlights a pivotal chance at improvement. Brands can seize this opportunity by creating valuable, trusted use cases that encourage customers to test new technologies.

[1] "Autonomous AI Research," Salesforce, June 2024.

Customers Consider AI Agents

Customers Who Agree with the Following Statement

	Total		
	35%	**32%**	**26%**

Consumers: 34% / 30% / 25%
Business Buyers: 47% / 46% / 42%

I would work with an AI agent instead of a person to avoid repeating myself.

I would work with an AI agent instead of a person for faster service.

I would share my personal information with an AI agent so it can better anticipate my needs.

■ Consumers
■ Business Buyers

03

Customers Navigate a Trial Period for Agent Trust

Lower stakes tasks such as appointment setting and creating more personalized content lead early use cases for AI agents. They are not yet trusted to replace human effort for more complex duties. In fact, most customers are outright uncomfortable with AI handling tasks that require higher levels of training, expertise, and human intuition, such as providing financial or health advice, for now.
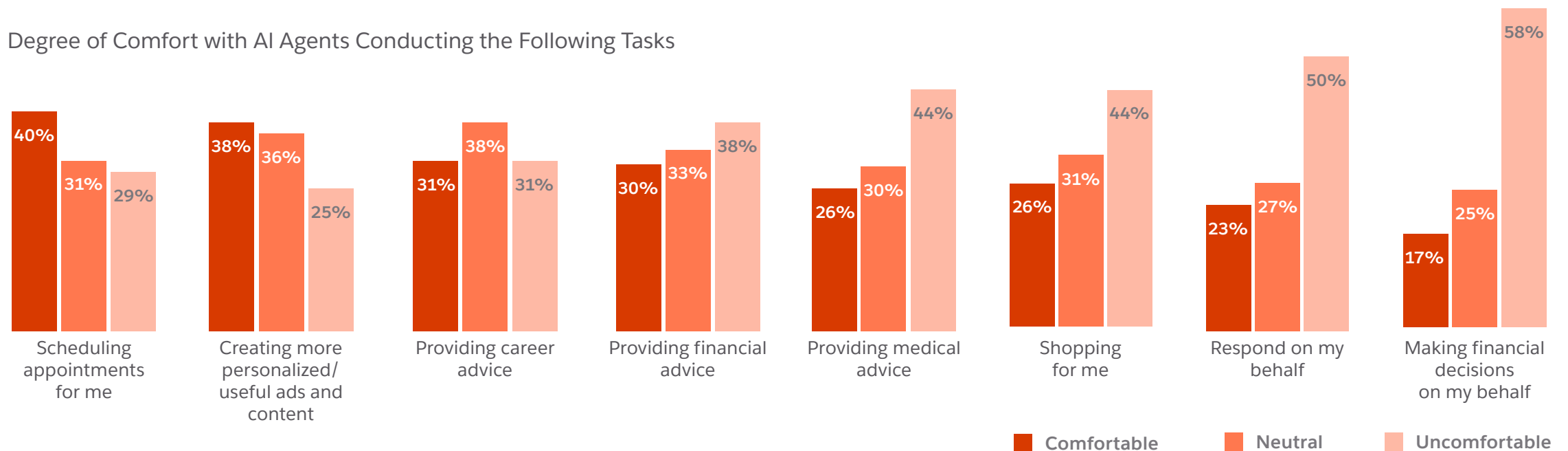
Additional Salesforce research[1] substantiates this, showing most U.S. adults are uneasy with AI in clinical roles but more receptive to its use in administrative tasks like scheduling and insurance processing. By relieving professionals of routine tasks, AI allows them to focus on strategic work and direct interactions with patients or customers.

It's important to note that AI agents are a new technology, and customers are still determining the ideal balance between automation and human interaction. Case in point: One-third of customers say they feel "neutral" about AI agents across various use cases, as they make up their minds. As companies navigate AI adoption and deployment with trust and responsible policies, comfort levels with a wider variety of use cases are likely to increase.

[1] Salesforce Pulse of the Patient Snapshot, March 2024.

Customers Navigate a Trial Period for AI Trust

Degree of Comfort with AI Agents Conducting the Following Tasks

	Comfortable	Neutral	Uncomfortable
Scheduling appointments for me	40%	31%	29%
Creating more personalized/ useful ads and content	38%	36%	25%
Providing career advice	31%	38%	31%
Providing financial advice	30%	33%	38%
Providing medical advice	26%	30%	44%
Shopping for me	26%	31%	44%
Respond on my behalf	23%	27%	50%
Making financial decisions on my behalf	17%	25%	58%

03

Transparency and Human Partnership Are Key to Trust

Both business buyers and consumers fundamentally agree that knowing when they're communicating with an AI agent is crucial for building trust.
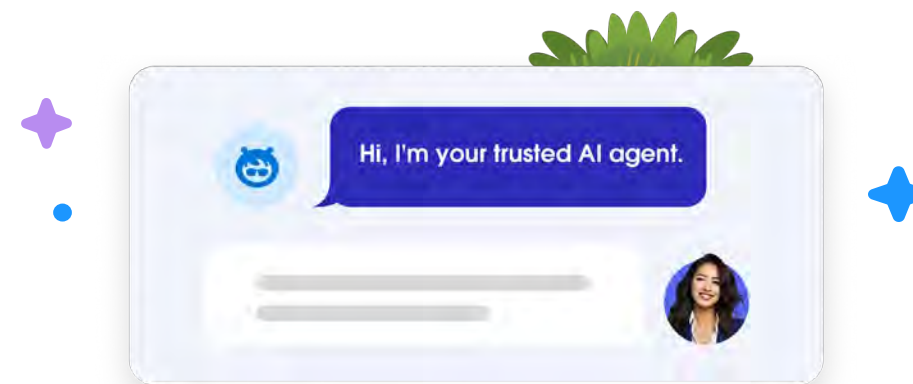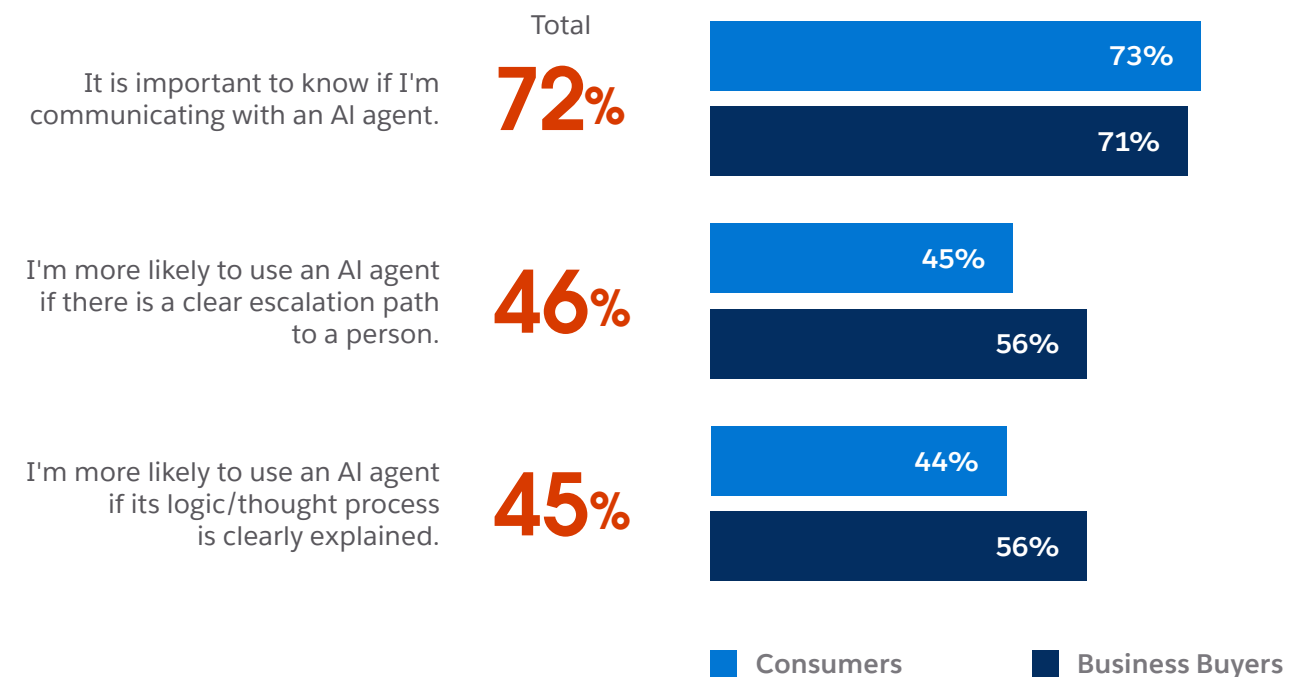
This transparency, along with the assurance that a person can jump in when needed and an understanding of how AI makes decisions, are key. Human collaboration mitigates concerns about the limitations of AI and provides a safety net for complex or sensitive issues. Additionally, customers want to understand how conclusions are reached, which builds trust in how these systems work.

A pivotal European Commission study shows that transparent AI operations can reduce user anxiety and increase acceptance, fostering reliability and fairness perceptions. As AI advances, adoption depends on creating transparent, trustworthy systems.[1]

[1] "Ethics Guidelines for Trustworthy AI." European Commission. April, 2019

Customers Are Forming Their Opinions About AI Agents

Customers Who Agree with the Following Statements

	Total	
It is important to know if I'm communicating with an AI agent.	**72**%	Consumers: 73% / Business Buyers: 71%
I'm more likely to use an AI agent if there is a clear escalation path to a person.	**46**%	Consumers: 45% / Business Buyers: 56%
I'm more likely to use an AI agent if its logic/thought process is clearly explained.	**45**%	Consumers: 44% / Business Buyers: 56%

■ Consumers   ■ Business Buyers

Hi, I'm your trusted AI agent.

Expert Perspective on Agentic AI

In what ways do you foresee AI agents transforming both customer and employee experiences in the next few years?

Over the next few years, the most significant shift will be employees' ability to personalize and deploy agents to handle specific tasks, freeing them to focus on higher-value activities. For consumers, interactions with brands will begin to feel almost magical – questions will be answered instantaneously, and the frustrations of navigating rigid decision trees will become a thing of the past. These enhanced experiences will likely start in the service sector but will quickly expand to other fields as well.

What direction do you see the future of agents taking? How will their complexity and capabilities continue to evolve?

Silvio Savarese
Chief Scientist & EVP, Salesforce

Over the next few years, we will not only see AI agents for service and sales helping employees become more productive and efficient, but also witness the rise of personal AI assistants for consumers. A really interesting aspect will be the interactions between these different agents. When a sales or service agent communicates with a personal agent to accomplish a task, both consumers and businesses stand to benefit. Imagine a personal agent becoming an essential partner for each of us – reducing the information and task overload that plagues our daily lives by filtering critical information, communicating on our behalf, or even acting on our behalf when necessary. Think how helpful it will be when an AI agent can find and book travel or medical appointments for us, manage returns, and so much more.

How can companies prepare for agentic AI?

Beyond the imperative of building trust through responsible AI ecosystems, as discussed extensively in this research, upskilling employees is another crucial factor. Employees will need to acquire new skills to train agents and effectively scale their capabilities. Slack research found that leader urgency to implement AI has grown 7x since the beginning of the year, but more than two-thirds of workers have yet to use the technology at work. It's crucial for workers at all levels to start experimenting and gaining hands-on experience. I recommend that employers prioritize training to help employees understand these tools and leverage AI's capabilities to eliminate busy work, allowing them to focus on higher-value tasks and human connections. At Salesforce, we are hosting AI training days for employees around the world, encouraging employees to learn AI skills on Trailhead, our free online learning platform, and creating dedicated Slack channels for sharing prompts, best practices, and more.

# Key Recommendations

Make trust your foundation.

1. Look for trusted solutions with robust security guardrails as your first priority.

2. Align AI and agentic strategy to your organizational values.

3. Ensure AI initiatives are transparent and offer both employee and end customer control.

4. Make clear how you plan to use customer data, and how it is protected.

5. Leverage customer data in a mutually beneficial way to establish trust and enhance customer perception of value.

Provide training on AI tools and ethics.

1. Clearly communicate the reasons behind the adoption of AI and agents. Highlight the benefits for both the organization and the employees, such as increased efficiency, reduced workload, and enhanced decision-making.

2. Provide employees with training and education that equips them to work confidently and responsibly with AI, such as hands-on training, webinars, and e-learning modules.

3. Proactively address potential concerns about job security, privacy, and the impact on daily tasks. Emphasize that AI is meant to augment, not replace, human capabilities.

Use tools like Agentforce for seamless AI integration.

1. Integrate AI that feels collaborative and human-centered to enhance customer experience and team productivity.

2. Developing AI in-house requires specialized skills and significant, ongoing resources. With Agentforce, you can tailor pre-built agents trained on your trusted CRM data to do whatever your business calls for.

3. Prioritize AI and agent use cases that directly address significant customer pain points, such as improving response times, personalizing interactions, or streamlining complex processes.
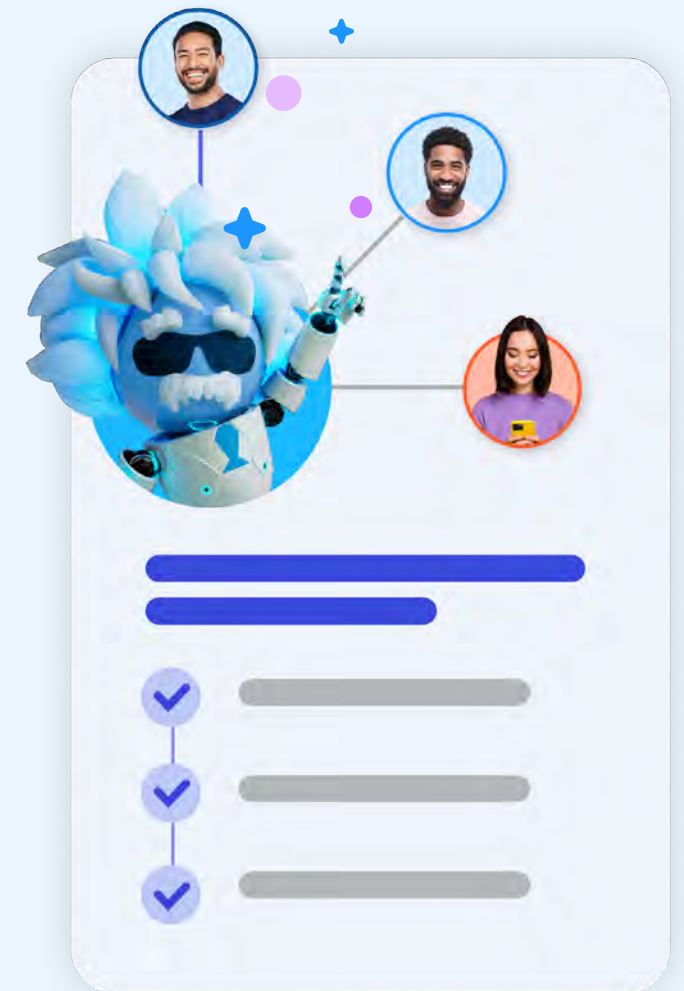
Want More?
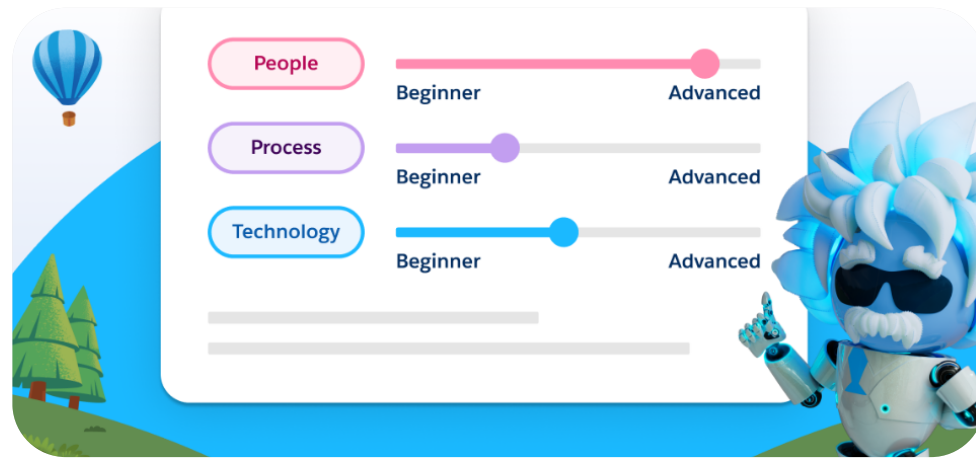
AI Readiness Tool

Assess your organization's level of AI readiness and learn tactical next steps to progress on your journey.
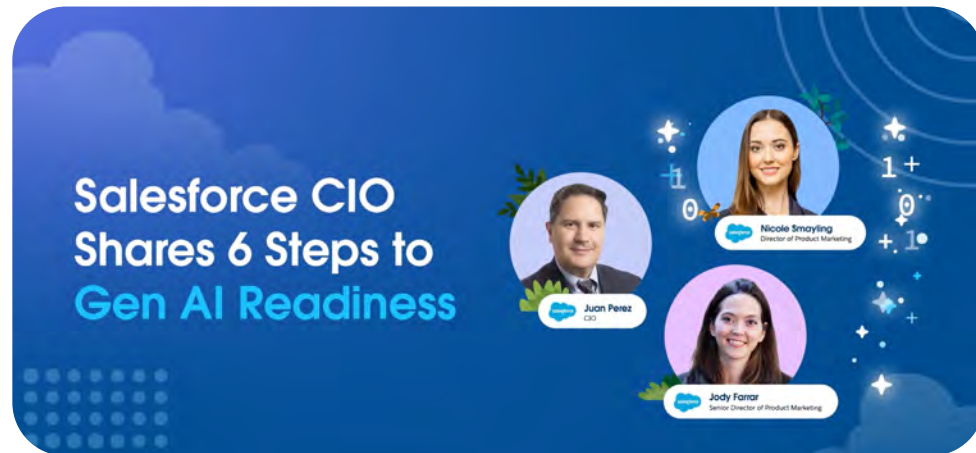
LEARN MORE >

Trends in AI for CRM

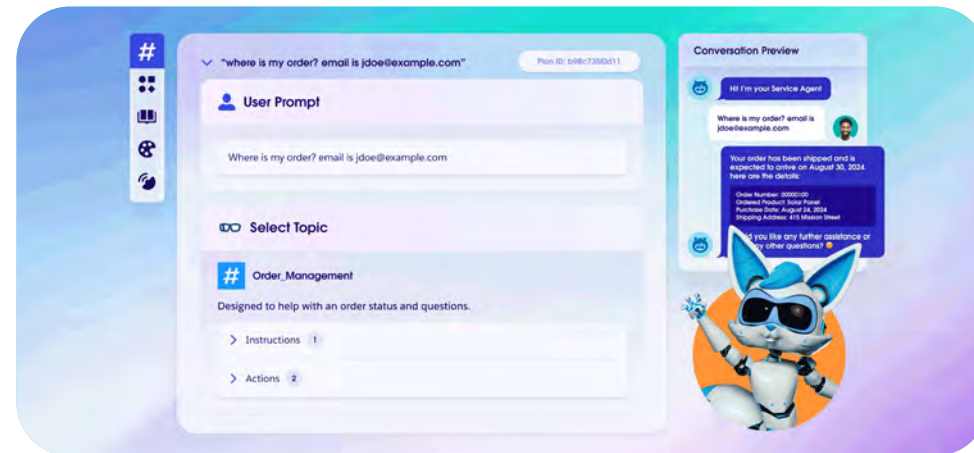Learn how AI is transforming the enterprise, and ways businesses can harness it for early wins.

LEARN MORE >

6 Steps to Gen AI Readiness

Salesforce's CIO shares six steps for gen AI readiness by exploring how Salesforce got AI-ready.
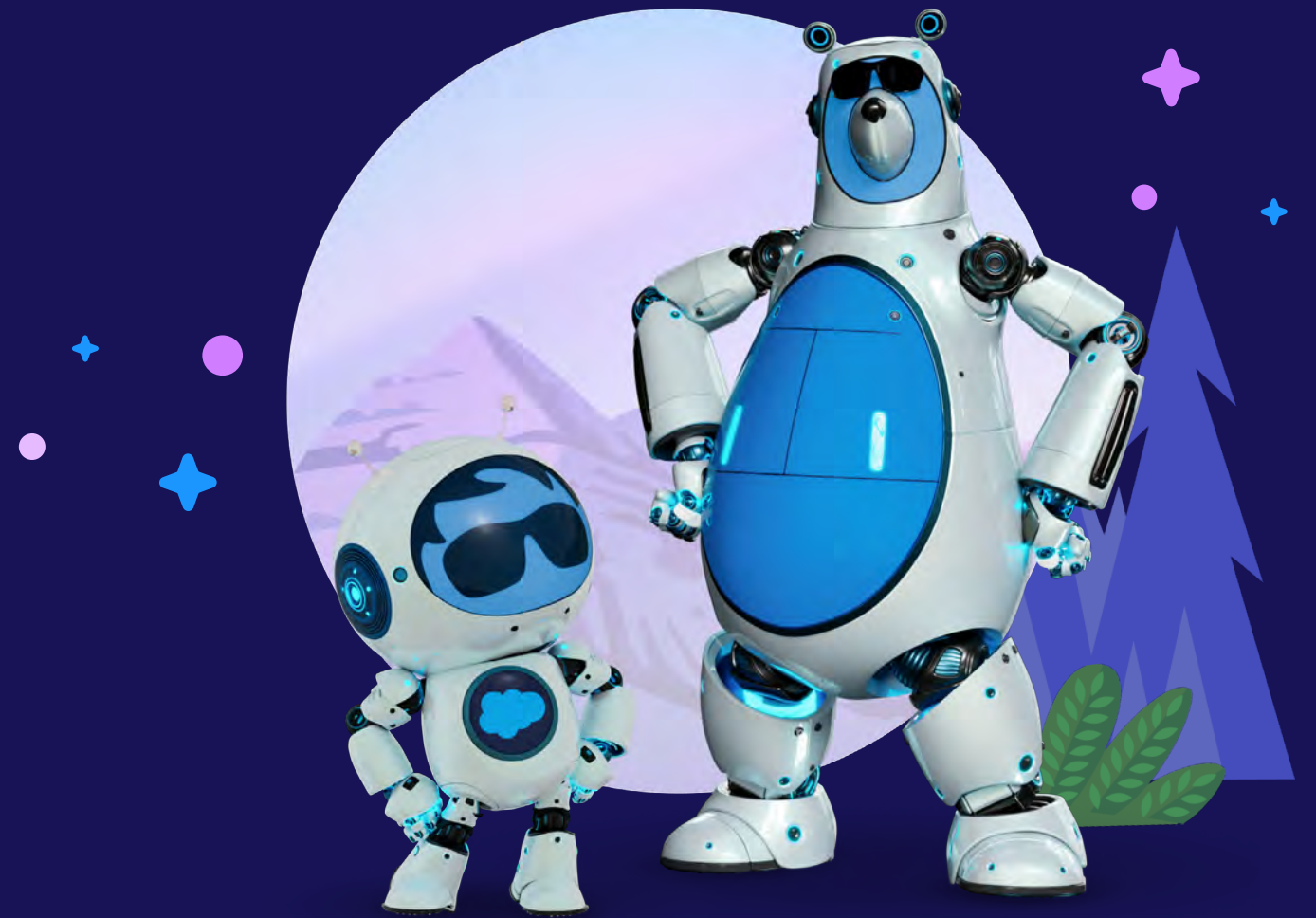
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Discover Agentforce

Get learning on Trailhead. Start with a quick look at Agentforce and autonomous agents before you build your first agent.

LEARN MORE >

Appendix

Survey Demographics

Country

Australia .... N= 1,127, 7%
Brazil .... N= 1,107, 7%
Canada ....N= 1,104, 7%
Denmark .... N= 288, 2%
Finland .... N= 289, 2%
France .... N= 1,225, 7%
Germany ....N= 1,108, 7%
India ....N= 1,148, 7%
Ireland .... N= 619, 4%
Italy .... N= 1,228, 7%
Japan ....N= 1,125, 7%
Netherlands ....N= 1,103, 7%
Norway .... N= 281, 2%
Singapore ....N= 1,103, 7%
Spain .... N= 1,127, 7%
Sweden ....N= 282, 2%
U.K. ....N= 282, 7%
U.S. ....N= 1,171, 7%

Customer Type

Business Buyers .... N= 1,570, 9%
Consumers .... N= 15,015, 91%

Generation

Silent (1945 or earlier) ....N= 290, 2%
Baby boomers (1946-1964) N= 3,979 24%
Gen X (1965-1980) ....N= 4,896, 30%
Millennials (1981-1996) .. N= 4,906, 30%
Gen Z (1997-2012) ....N= 2,514, 15%

Gender

Male .... N= 8,018, 48%
Female ....N= 8,306, 50%
Other .... N= 261, 2%