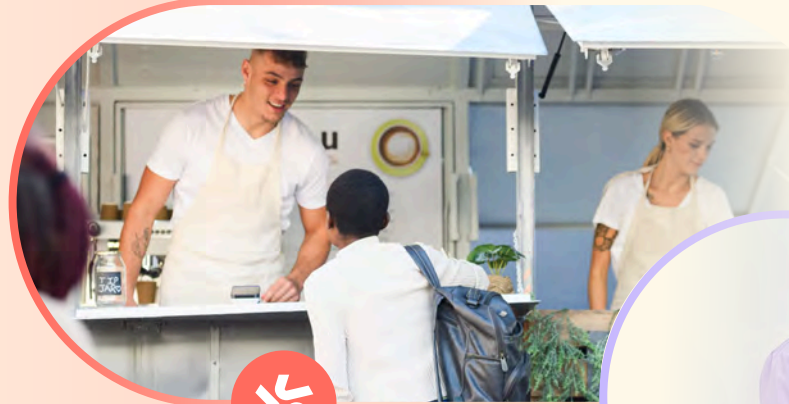# BETTER TOGETHER:

How AI and Human Connection Will Transform Frontline Work

deputy

Introduction

For years, headlines have promised that AI will eliminate drudgery, streamline operations, and even free us from burnout. In offices and boardrooms, excitement often runs high. However, the question that rarely gets asked is the one that matters most: what do workers themselves think?

Not the programmers or executives, but the millions of frontline employees who staff restaurants, hospitals, retail shops, and hotels. These are the people who see customers face-to-face, juggle unpredictable schedules, and deliver the service that defines the everyday human experience.

This year, we asked this question and more in our first AI-focused global survey of shift workers across the United States, the United Kingdom, and Australia. The survey covered healthcare, retail, hospitality, and food services. We asked about their experiences and what they felt, feared, and hoped for.

The findings reveal both opportunity and disconnect. Nearly half of workplaces (48%) now use some form of AI — yet only one in four workers say they personally interact with it. 42% believe their workplace doesn't use AI at all, and another 10% simply don't know. It's an invisible revolution happening around workers, not with them.

What remains clear is that human connection still anchors the world of work. 94% of workers say AI will never replace the emotional support and compassion people provide. 98% believe the human touch is essential to their jobs — that empathy can't be automated.

The real issue isn't fear of technology. It's the fear of being left out of the conversation. Only 17% of workers say their employer is completely transparent about AI's impact on jobs, just 15% are consulted before rollouts, and only 17% fully understand their legal rights around AI at work. The gap isn't about capability — it's about communication and trust.

Across generations, workers expressed the same truth in different ways. Millennials tend to see AI as a helpful assistant; Boomers champion empathy as the heart of great work; and long-time employees worry about being left behind as change accelerates around them. But beneath these differences lies a shared belief: progress works best when people are part of it, when new technology is being rolled out with them, not forced upon them.

The message is clear: frontline workers aren't concerned about AI; they want to be part of how it's built and used. Business owners should take note of this because the future of work won't be technology or people.

It will be both — working *better together*.

Silvija Martincevic
CEO, Deputy

Contents

The global picture: AI's promise, limits, and blind spots

The adoption gap — AI's invisible revolution

Artificial intelligence has entered the frontline workplace, but not in the way many think. In our survey, 48% of workers reported that their workplace uses some form of AI. But peel back the numbers and the adoption story changes.

Only 25% of workers say they personally use AI tools. Another 23% say AI is used in their workplace — but not by them. A striking 42% believe their workplace doesn't use AI at all. And 10% say they don't know.

This means nearly half of frontline workers either wouldn't encounter AI in their daily work, or wouldn't recognise it if they did.

Why the disconnect? The answer lies in invisibility. Many AI systems operate behind the curtain: scheduling software, inventory algorithms, predictive staffing tools. Employees feel the effects: shift changes, stock arrivals, automated metrics, but rarely see the systems driving them.
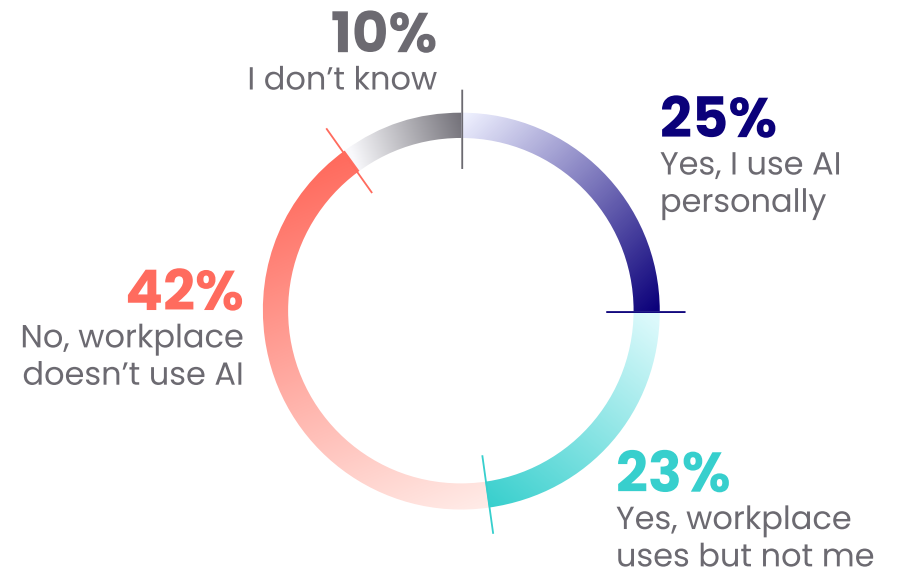
As one Australian retail assistant put it:

> **"I know something changed in how we're rostered, but I couldn't tell you what tool is behind it. It just shows up."**

The result is a workforce that experiences the adoption of AI without understanding it. That invisibility can breed confusion, scepticism, and missed opportunities — workers don't know how to leverage these tools, managers can't fully trust adoption, which limits the potential benefits of AI.

The adoption gap — AI's invisible revolution:

10%
I don't know

25%
Yes, I use AI personally

42%
No, workplace doesn't use AI

23%
Yes, workplace uses but not me

Satisfaction in use, scepticism about the future

For the workers who do interact with AI, the experience is largely positive. **96% of users say they are satisfied with AI.**

When asked about AI's impact, 71% of those who have it in their workplaces say that it makes them more productive. **68% say that it makes their job much easier.**

Most strikingly, when asked about the future, only 37% of workers say they feel optimistic about AI's role in their industry.
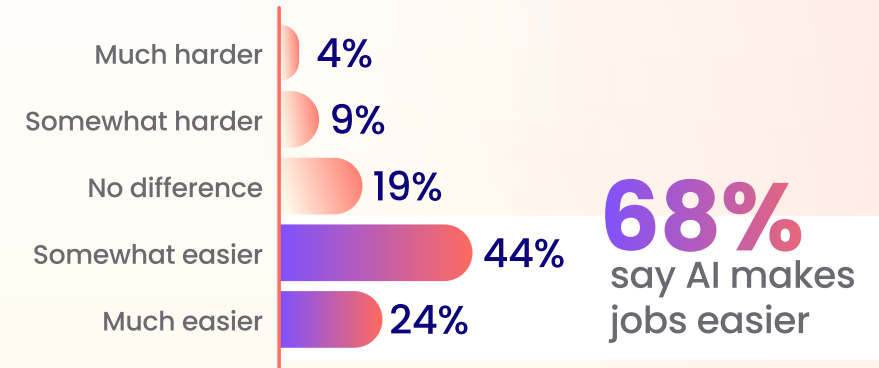
This disconnect between present satisfaction and future scepticism reveals a deeper truth: positive experiences are not enough to build trust.

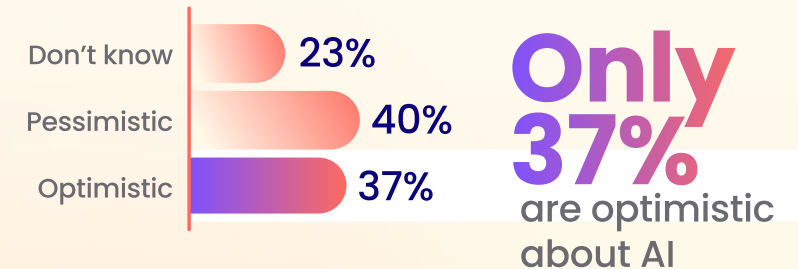As a UK hospitality worker explained:

> **The app that books tables is fine, it helps. But that doesn't mean I believe AI will change our industry for the better."**

Global satisfaction with AI tools (job easier/harder)

Much harder	4%
Somewhat harder	9%
No difference	19%
Somewhat easier	44%
Much easier	24%

68% say AI makes jobs easier

Global optimism about AI

Don't know	23%
Pessimistic	40%
Optimistic	37%

Only 37% are optimistic about AI

The message is clear. Workers like the tools they touch, but remain cautious about promises of transformation.

The burnout relief, but not the cure

Workforce burnout is a global crisis. Chronic understaffing, unpredictable shifts, and unrelenting customer demands are pushing frontline workers to the breaking point. AI is often heralded as a solution.

The data suggests a more cautious reality. Among people who use AI at work, **40% say it helps reduce stress and burnout.** Even modest relief matters in environments where emotional and physical demands are relentless.

A US food service employee described the benefit this way:

> *The system counts stock faster than we ever could. That takes one thing off our plate, and it makes the shift a little easier."*

As an Australian nurse put it:

> *AI helps with admin, but when I have twelve patients and six of them need urgent care, no technology fixes that."*

AI can lighten the load, but it can't mend the system. Workers welcome the help, but are under no illusion that AI will solve burnout on its own.

Empathy is non-negotiable

Nowhere are workers more unified than in their defence of empathy. Across industries and countries, the boundary is emphatic: 98% say that a human touch is essential in their line of work (68% "very essential" + 30% "somewhat essential). 94% agree AI cannot replace empathy.

The voices behind the numbers are passionate.

A UK healthcare assistant wrote:

> *Patients want compassion. Machines don't offer compassion. They don't know what it feels like to be in pain.*"

An American hospitality worker said:

> *AI can book the room, but it can't look a guest in the eye and make them feel welcome.*"

And an Australian retail employee explained:

> *Customers don't just want the answer. They want you to care. AI doesn't care.*"

This theme is universal. Whether in hospitals, shops, restaurants, or hotels, workers draw a line:

Let AI take the mechanical tasks, but leave empathy, trust, and human connection to people.

**Global:
Human touch
is essential**

2%
Not Essential

98%
Essential
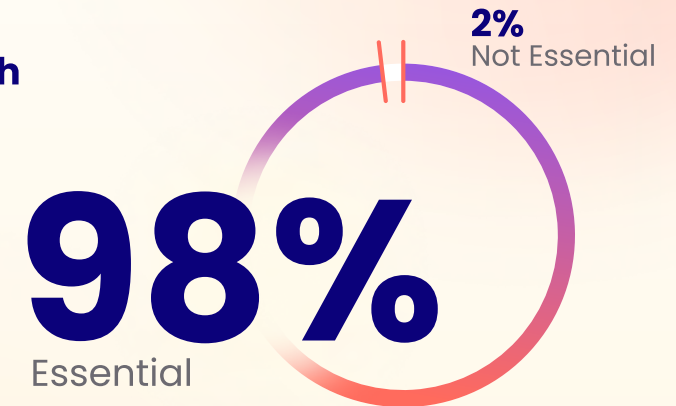
**Global:
Empathy cannot
be replaced by AI**

6%
Disagree

94%
Agree
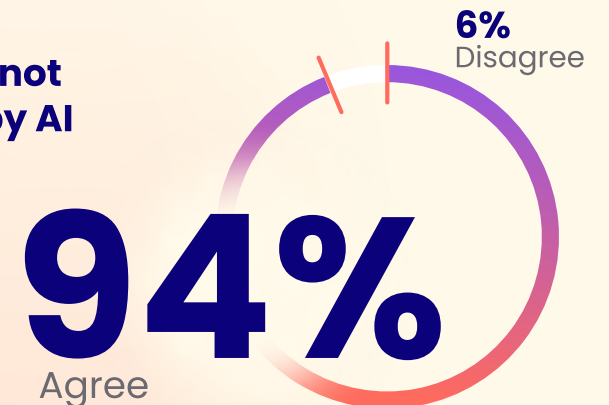
The transparency crisis — trust is the real divide

When it comes to AI at work, the biggest gap isn't in using the tools — it's about communication.

- **Transparency:** Only 17% of workers report that their employer is completely transparent about AI's impact on jobs.
- **Consultation:** Only 15% of workers are always consulted before new AI solutions are implemented.
- **Awareness of rights:** Only 17% indicate that they are fully aware of their rights regarding AI in the workplace.
- **Demand for clarity:** 22% strongly demand more communication regarding AI.

One UK retail worker voiced the frustration bluntly:

> *They brought in self-checkout. No one explained why. Customers ask me questions, and I can't answer. It makes us look clueless."*

An Australian hospitality worker echoed:

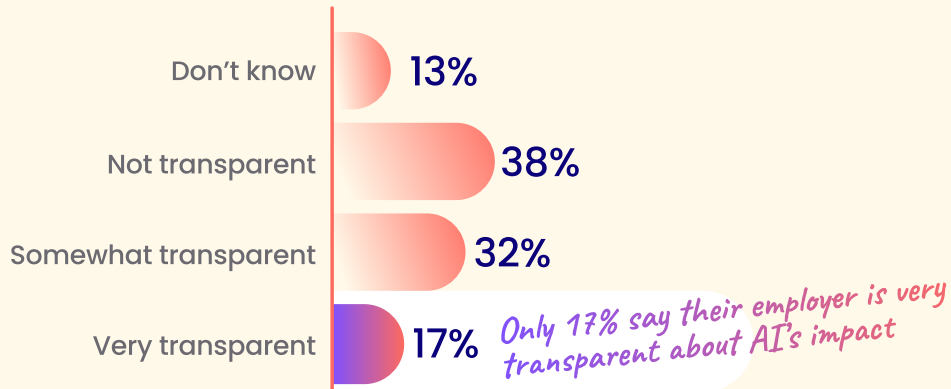> *If you explain it, we'll accept it. If you don't, we'll resist."*

The demand is not for less technology but for more communication. Workers want to be part of the conversation, not passive recipients of management decisions.
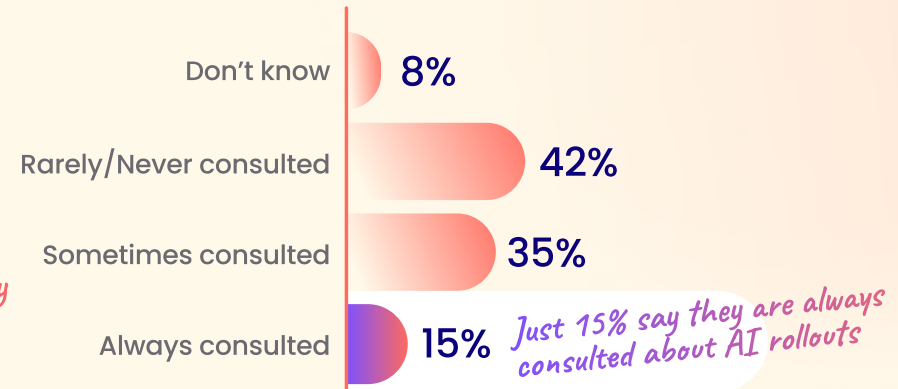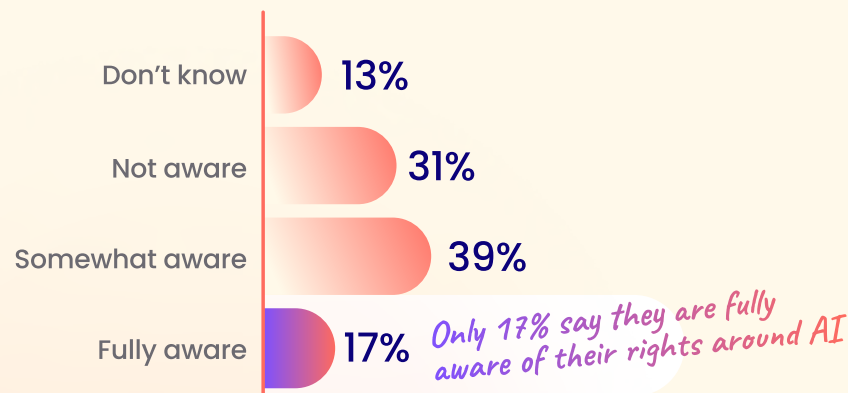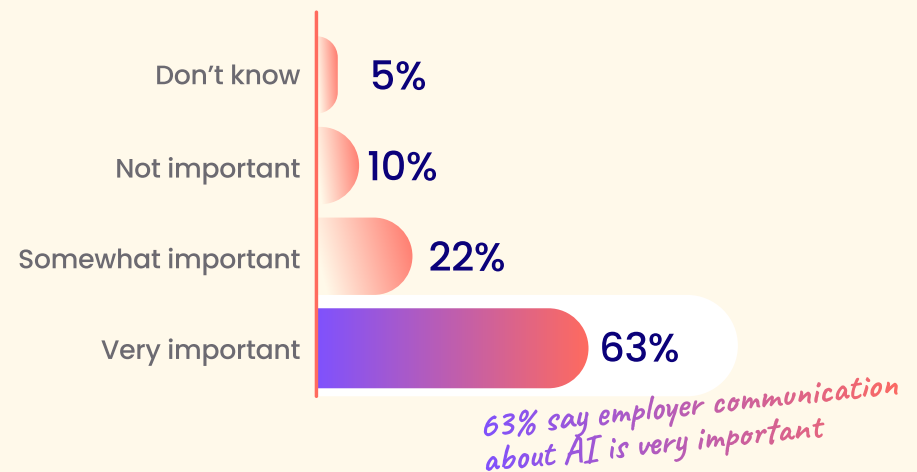
Global findings

Employer transparency on AI

- Don't know — **13%**
- Not transparent — **38%**
- Somewhat transparent — **32%**
- Very transparent — **17%**

Only 17% say their employer is very transparent about AI's impact

Consulted before AI rollouts

- Don't know — **8%**
- Rarely/Never consulted — **42%**
- Sometimes consulted — **35%**
- Always consulted — **15%**

Just 15% say they are always consulted about AI rollouts

Awareness of AI rights

- Don't know — **13%**
- Not aware — **31%**
- Somewhat aware — **39%**
- Fully aware — **17%**

Only 17% say they are fully aware of their rights around AI

Demand for employer communication on AI

- Don't know — **5%**
- Not important — **10%**
- Somewhat important — **22%**
- Very important — **63%**

63% say employer communication about AI is very important

The global picture

Analysis of global workforce data indicates a pattern of conditional trust toward AI adoption rather than uniform acceptance or rejection. Key observations include:

- **Adoption:** AI adoption is real, but half the workforce reports no exposure in their roles.

- **Satisfaction vs optimism:** Workers who interact with AI report high satisfaction, yet optimism about AI's future impact remains low.

- **Empathy:** Measured by workers' perceptions of whether AI supports their experience and reduces stress, rather than adding confusion or workload. Workers report high appreciation when AI streamlines tasks or eases daily operations.

- **Transparency:** There are minimal concerns about job displacement, but a lack in how employees are informed about AI's purpose, functionality, and potential impact on their roles. As one worker summed it up:

> **"** *AI can make things easier. But it has to work with us, not around us."*

The crossroads are clear. AI can deepen mistrust and remain an invisible, imposed system or become the foundation of a more empowered workforce.

The choice lies not in the technology itself, but in how employers implement it. Transparency, consultation, and empathy are not extras. They are the conditions on which frontline workers will accept or reject AI.

Replacement is not the real fear

Contrary to assumptions, frontline workers' resistance to AI is rarely driven by fear of job loss. **Only 9% of workers consider job replacement by AI very likely within the next five years.**

Workers' primary concern is the absence of clear information and guidance.

An Australian food service worker wrote:

> ❝
> **AI is useful, but management just brings it in. No explanation, no training."**

A UK retail worker echoed the sentiment:

> ❝
> **We are not informed enough. We need to know how this affects us."**

Another added:

> ❝
> **AI isn't the problem. It's being kept in the dark that's the problem."**

The demand for communication

This is why 27% of workers strongly demand more communication about AI. The demand is highest in retail (31%), where automation is most visible to customers, but workers feel least consulted.

One retail employee summed it up:

> ❝
> **They put in self-checkout without even telling us why. Customers ask us questions we can't answer."**

The frustration is not with the technology; it is with being sidelined.

Rights awareness — a critical gap

Perhaps most troubling, only 17% of workers are fully aware of their rights regarding AI, including data privacy, automated decision-making, and algorithmic scheduling.

In practice, this means most workers are navigating a new technological reality without the tools to defend themselves.

A UK worker noted:

> **I don't know what data they're collecting. I don't know what they're using it for."**

An Australian employee added:

> **"If AI makes a decision about my shifts, what rights do I have? No one has explained."**

When we piece these findings together, the trust equation becomes clear:

- **Workers don't fear AI itself; they fear AI that isn't transparent.**
- **Workers aren't worried about being replaced; they are worried about being left out of the decision-making.**

Effective AI adoption requires transparent communication, worker consultation, and clear explanation of rights. Without these measures, trust cannot be established, regardless of the technology's capabilities.

What this means for employers:

The lesson for leaders is clear. Workers do not want to resist AI. They want to understand it, be consulted about it, and be reassured that it will not erode the human side of their jobs.

Transparency is not a bonus; it is a requirement. Consultation is not optional; it is essential. Rights awareness is not a luxury; it is a foundation.

As one worker wrote:

> **I don't know what data they're collecting. I don't know what they're using it for."**

For AI to succeed on the frontline, implementation strategies must respect the irreplaceable nature of human empathy **while actively rebuilding trust through transparency, consultation, and empowerment.**

Industry deep dives

Food service: Efficiency with limits

Food service workers are more open to AI. They see value in kiosks, ordering systems, and automated inventory.

47%
report satisfaction with AI *the highest of any industry*

38%
are optimistic about AI's role in the future

But even here, boundaries are set. **97% say human connection is essential**, and 53% reject the idea that empathy could be automated.

A US fast-food employee summed it up:

> **The machine can take the order, but it doesn't know when someone looks upset or when they just want a friendly word."**

Another cafe worker in Australia explained:

> **AI helps us get through rushes, but when a customer thanks me for being kind, I know why my job matters."**

In our survey, 43% of food service workers reported that their workplace uses AI. 48% said their workplace does not, and 9% were unsure. Only 20% personally use AI tools.

This gap is telling. AI is present in the food service environment, but most employees don't interact with it directly. They see the kiosks and predictive stock systems, but rarely control them.

Trust is thin. Only 18% of food service workers say their employer is fully transparent about AI's job impact. Consultation is rare, and training is inconsistent.

One worker summed it up:

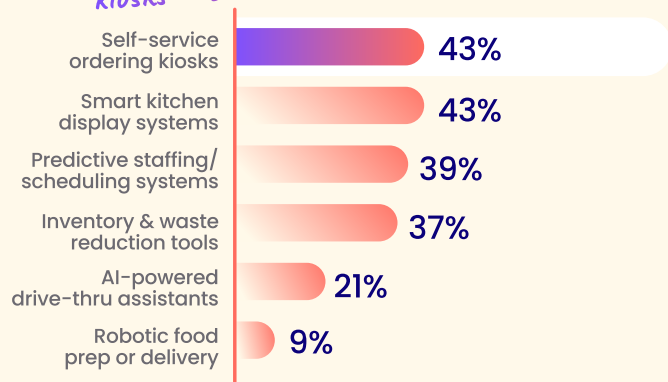> **New tech just arrives. We're expected to figure it out."**

Food service demonstrates conditional acceptance: AI is embraced for efficiency, but not at the cost of empathy, explanation, or respect.
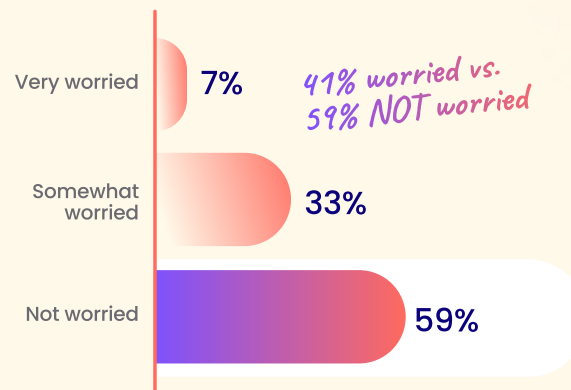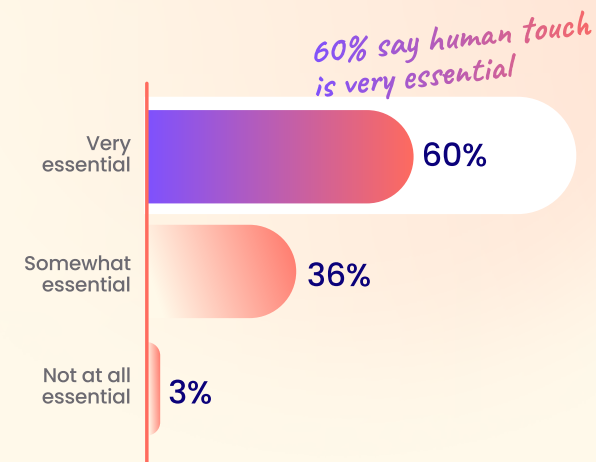
Food service findings

AI tool adoption

43% of food service workers use kiosks — the sector's top AI tool
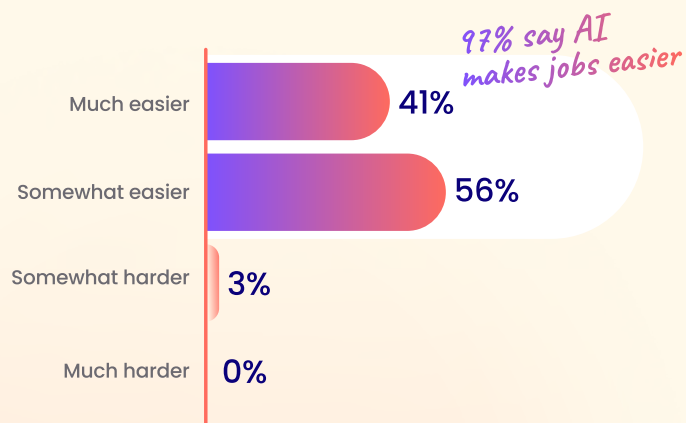
- Self-service ordering kiosks — **43%**
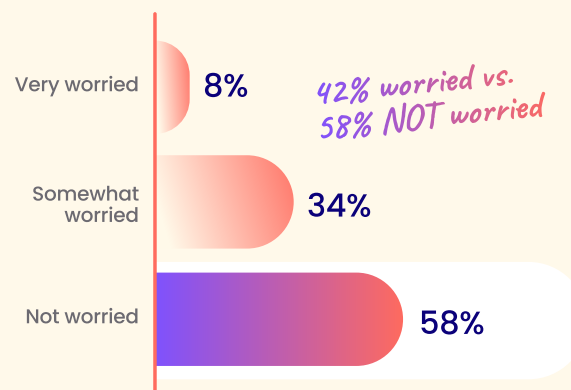- Smart kitchen display systems — **43%**
- Predictive staffing/scheduling systems — **39%**
- Inventory & waste reduction tools — **37%**
- AI-powered drive-thru assistants — **21%**
- Robotic food prep or delivery — **9%**

Worried AI will replace jobs

41% worried vs. 59% NOT worried

- Very worried — **7%**
- Somewhat worried — **33%**
- Not worried — **59%**

Human touch is essential

60% say human touch is very essential

- Very essential — **60%**
- Somewhat essential — **36%**
- Not at all essential — **3%**

Job easier/harder

97% say AI makes jobs easier

- Much easier — **41%**
- Somewhat easier — **56%**
- Somewhat harder — **3%**
- Much harder — **0%**

Worried AI will reduce hours

42% worried vs. 58% NOT worried

- Very worried — **8%**
- Somewhat worried — **34%**
- Not worried — **58%**

Empathy cannot be replaced

53% strongly agree empathy cannot be replaced

- Strongly agree — **53%**
- Agree — **41%**
- Disagree — **5%**
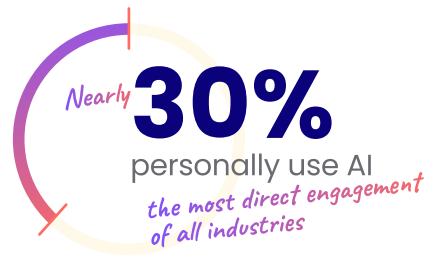- Strongly disagree — **1%**

Hospitality: Warmth meets the machine

Hospitality is built on warmth. Workers know this to be central to their roles, and they are protective. **97% say human connection is essential**, and 53% reject the idea that AI can replicate having empathy in service interactions.

A hotel receptionist explained:

> *Guests don't remember the check-in software — they remember the kindness of the person behind the desk."*

Even in environments where AI can enhance speed and efficiency, the data show that the core value of hospitality remains human-centred.

57%
report AI use in their workplace *the highest of any sector*

Nearly **30%**
personally use AI *the most direct engagement of all industries*

Trust is a paradox in this sector. On one hand, 22% of hospitality workers report full transparency from employers, the highest across industries. On the other hand, 15% believe replacement is very likely in the next five years, which is the highest replacement fear of any group.

This paradox arises because automation is highly visible. Workers know what's happening, but that visibility makes the risk feel more real.

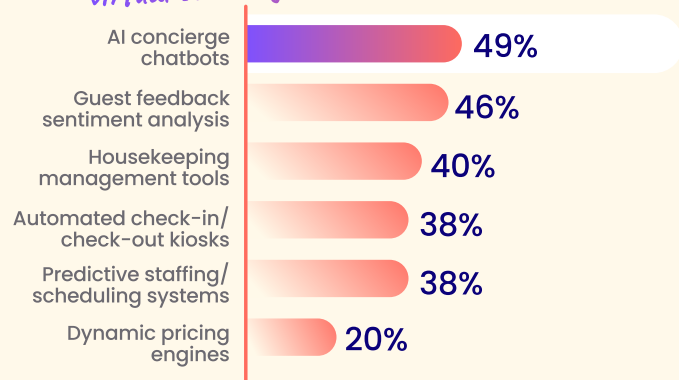One hotel employee summed it up:

> *AI makes service faster, but also colder. Guests are more likely to remember how they felt, not how quick it was."*

Hospitality shows the knife-edge of adoption: workers value AI's convenience, but they fiercely protect warmth as the essence of their work.
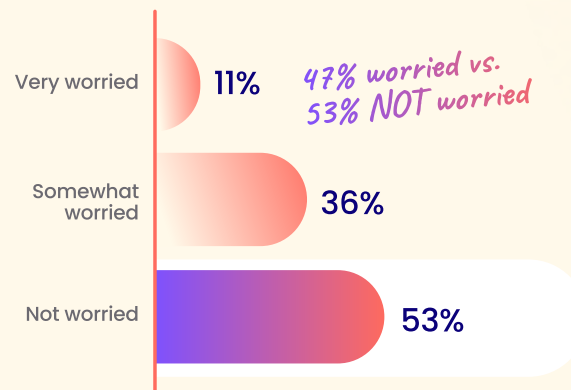
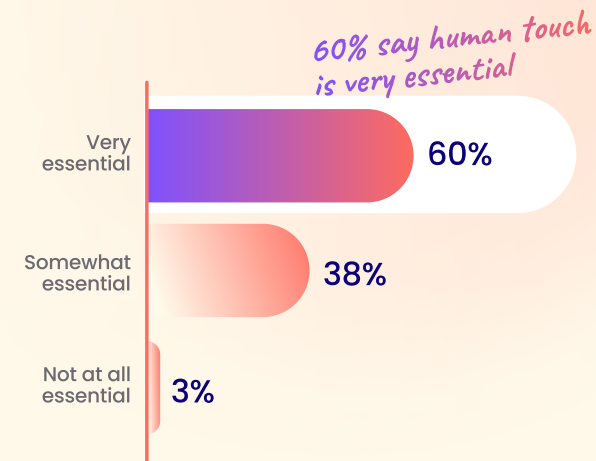# Hospitality

AI tool adoption

49% of hospitality workers use chatbots & virtual concierges — the top AI tool
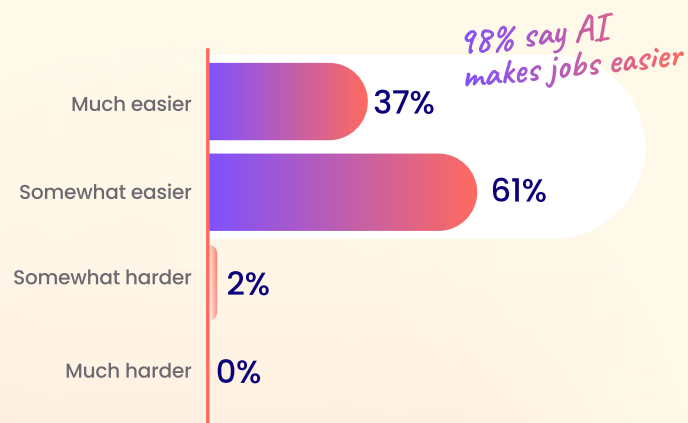
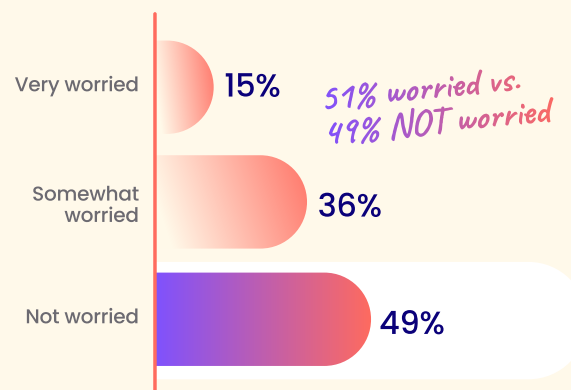|	
AI concierge chatbots	49%
Guest feedback sentiment analysis	46%
Housekeeping management tools	40%
Automated check-in/ check-out kiosks	38%
Predictive staffing/ scheduling systems	38%
Dynamic pricing engines	20%

Worried AI will replace jobs

47% worried vs. 53% NOT worried

Very worried	11%
Somewhat worried	36%
Not worried	53%

Human touch is essential

60% say human touch is very essential

Very essential	60%
Somewhat essential	38%
Not at all essential	3%

Job easier/harder

98% say AI makes jobs easier

Much easier	37%
Somewhat easier	61%
Somewhat harder	2%
Much harder	0%

Worried AI will reduce hours

51% worried vs. 49% NOT worried

Very worried	15%
Somewhat worried	36%
Not worried	49%

Empathy cannot be replaced

53% strongly agree empathy cannot be replaced

Strongly agree	53%
Agree	38%
Disagree	8%
Strongly disagree	1%

Healthcare: Human-first, admin-assist

Healthcare workers, more than anyone else, defend empathy as the non-negotiable part of their work. **Nearly all (99%) say human touch is very essential**, and 63% strongly agree that empathy cannot be replaced.

An Australian nurse explained:

> **AI can update charts. It can't sit with a patient who's scared. That's why we're here."**

A UK carer added:

> **Technology is fine for admin, but patients with dementia need someone to listen to them, not a screen."**

50%
report AI use in their workplace

29%
personally use AI

Interestingly, healthcare workers are least fearful of replacement; only 6% believe it is likely within five years. This suggests deep confidence in the irreplaceability of care.

But trust is not robust. Only 20% say their employer is completely transparent about AI, and 23% strongly demand more communication. Workers are not afraid of losing their roles, but they resent being excluded from decisions about AI.

As one doctor in the US put it:

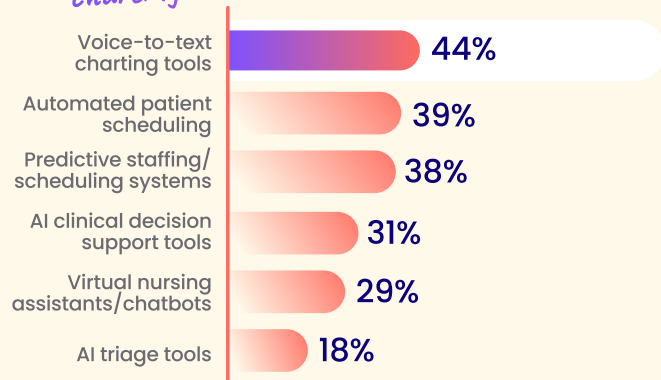> **AI should take work off our plates, not change how we care. The patient has to come first."**

While healthcare workers generally accept AI tools for administrative tasks such as scheduling or transcription, they draw a clear boundary when it comes to patient-facing care.

The data indicate strong support for AI in supportive functions, but **empathy remains central to clinical practice**, something irreplaceable by technology.
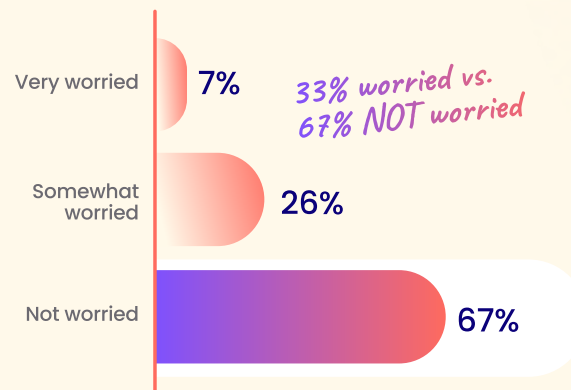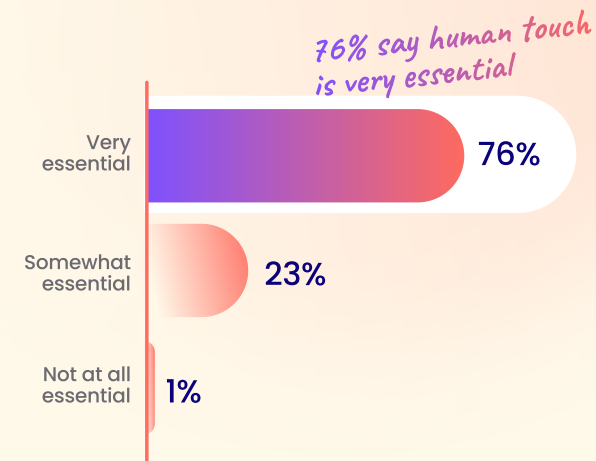
Healthcare

AI tool adoption

44% of healthcare workers use voice-to-text charting tools — the top AI tool
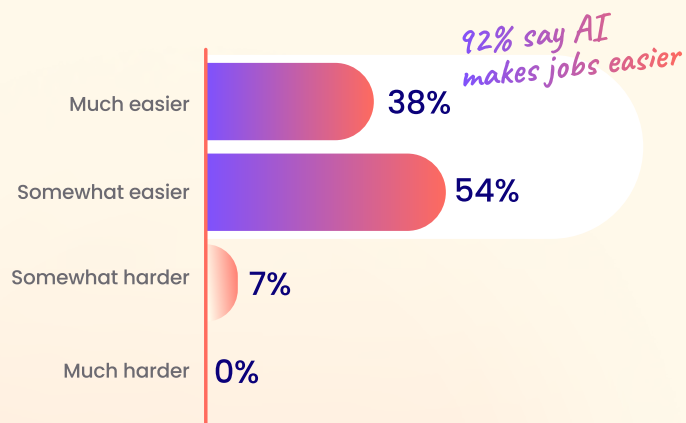
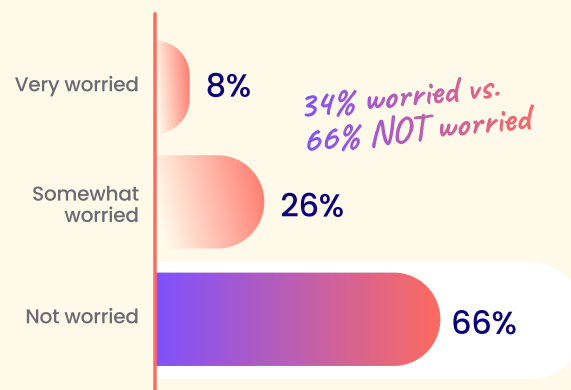|	
Voice-to-text charting tools	44%
Automated patient scheduling	39%
Predictive staffing/scheduling systems	38%
AI clinical decision support tools	31%
Virtual nursing assistants/chatbots	29%
AI triage tools	18%

Worried AI will replace jobs

33% worried vs. 67% NOT worried

Very worried	7%
Somewhat worried	26%
Not worried	67%

Human touch is essential

76% say human touch is very essential

Very essential	76%
Somewhat essential	23%
Not at all essential	1%

Job easier/harder

92% say AI makes jobs easier

Much easier	38%
Somewhat easier	54%
Somewhat harder	7%
Much harder	0%

Worried AI will reduce hours

34% worried vs. 66% NOT worried

Very worried	8%
Somewhat worried	26%
Not worried	66%

Empathy cannot be replaced

63% strongly agree empathy cannot be replaced

Strongly agree	63%
Agree	32%
Disagree	5%
Strongly disagree	0%

# Retail: Visible automation, growing mistrust

Retail represents a frontline of visible automation. Self-checkout kiosks, chatbot systems, and predictive stocking models directly shape customer experience. Workers navigate these changes in full view of the public.

Retail workers face automation most visibly in chatbots, self-checkout, and predictive stocking systems. **99% say human connection is essential**, and 62% insist empathy cannot be replaced.

As one shop assistant explained:

> **AI can make ordering easier, but it can't reassure a customer who's upset."**

Data from the retail sector indicates that while AI is accepted for transactional and operational tasks, human management of emotions remains critical.

46%
report AI use in their workplace

23%
personally use AI
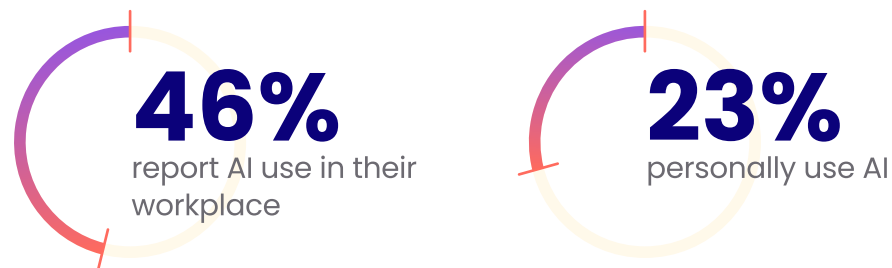
A UK shop worker said:

> **AI can restock shelves, but it can't calm down a customer who's upset. That's what we do."**

A US cashier added:

> **"Self-checkouts don't smile. They don't answer questions. People still come to us."**

Trust is weakest in retail. Only 13% say their employer is fully transparent, the lowest across industries. Consultation is rare, and rights awareness is poor.
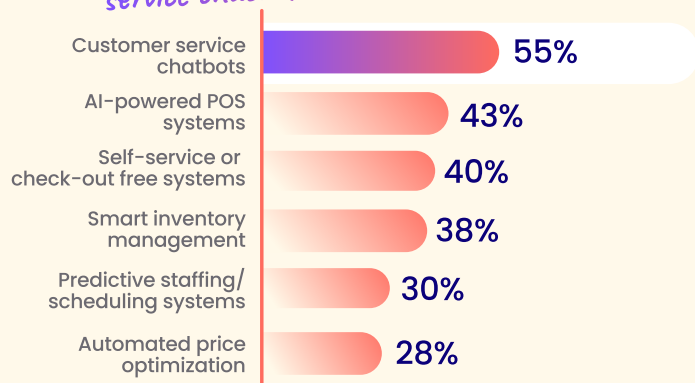
This breeds frustration. 26% of retail workers strongly demand more communication. 12% believe replacement is very likely in five years, but their anger lies in exclusion. Workers feel automation is imposed without consultation, eroding their confidence and customer trust.

Retail demonstrates the sharpest warning: visibility without dialogue breeds mistrust.
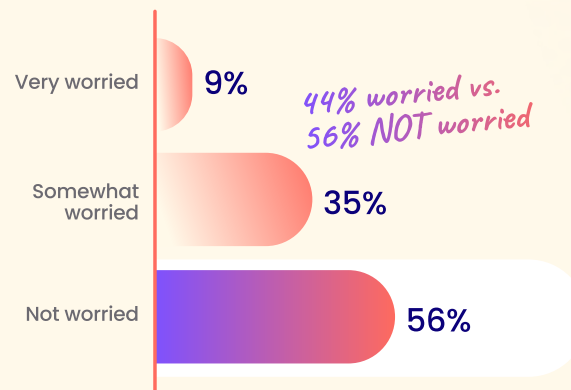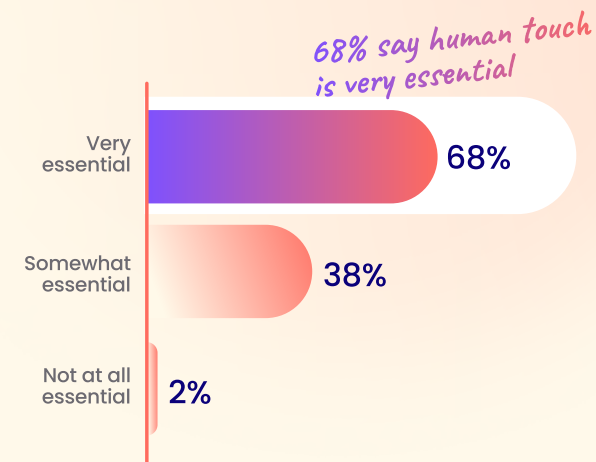
Retail

AI tool adoption

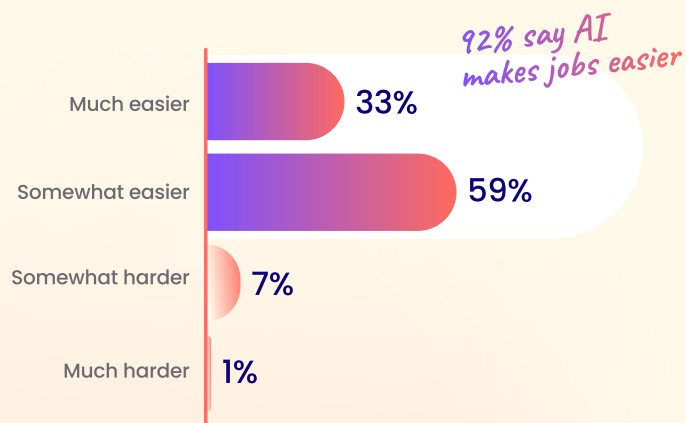*55% of retail workers use customer service chatbots — the top AI tool*

Customer service chatbots	55%
AI-powered POS systems	43%
Self-service or check-out free systems	40%
Smart inventory management	38%
Predictive staffing/ scheduling systems	30%
Automated price optimization	28%

Worried AI will replace jobs

44% worried vs. 56% NOT worried

Very worried	9%
Somewhat worried	35%
Not worried	56%

Human touch is essential

68% say human touch is very essential

Very essential	68%
Somewhat essential	38%
Not at all essential	2%

Job easier/harder

92% say AI makes jobs easier

Much easier	33%
Somewhat easier	59%
Somewhat harder	7%
Much harder	1%

Worried AI will reduce hours

47% worried vs. 53% NOT worried

Very worried	13%
Somewhat worried	34%
Not worried	53%

Empathy cannot be replaced

62% strongly agree empathy cannot be replaced

Strongly agree	62%
Agree	32%
Disagree	5%
Strongly disagree	1%

Summary of shift-based industry sectors

Across these shift-based industries, the common thread is unmistakable: workers want AI to support, not replace. They want to be informed and consulted, not sidelined.

- **Food Service:** AI improves efficiency, yet human empathy remains central. Workers value AI for operational tasks but insist on preserving customer interaction.

- **Hospitality:** Workers embrace tools that streamline service, but have concerns over exclusion and potential job replacement.

- **Healthcare:** AI is welcomed for administrative support, but not for frontline patient care.

- **Retail:** Automation is most visible. Optimism is lowest, mistrust is highest. While efficiency gains are recognised, the lack of transparency and consultation erodes confidence.

As one worker summed it up:

> **AI can make our jobs easier, but only if we're part of the decision. Otherwise, it just feels like control."**

The industry deep dives show that frontline workers are not uniform in their views. Context shapes everything. In food service, speed makes AI useful. In hospitality, warmth makes it risky. In healthcare, empathy makes it untouchable. In retail, visibility makes it contested.

What unites them is their view that AI may manage tasks and systems, but humans manage empathy and connection.
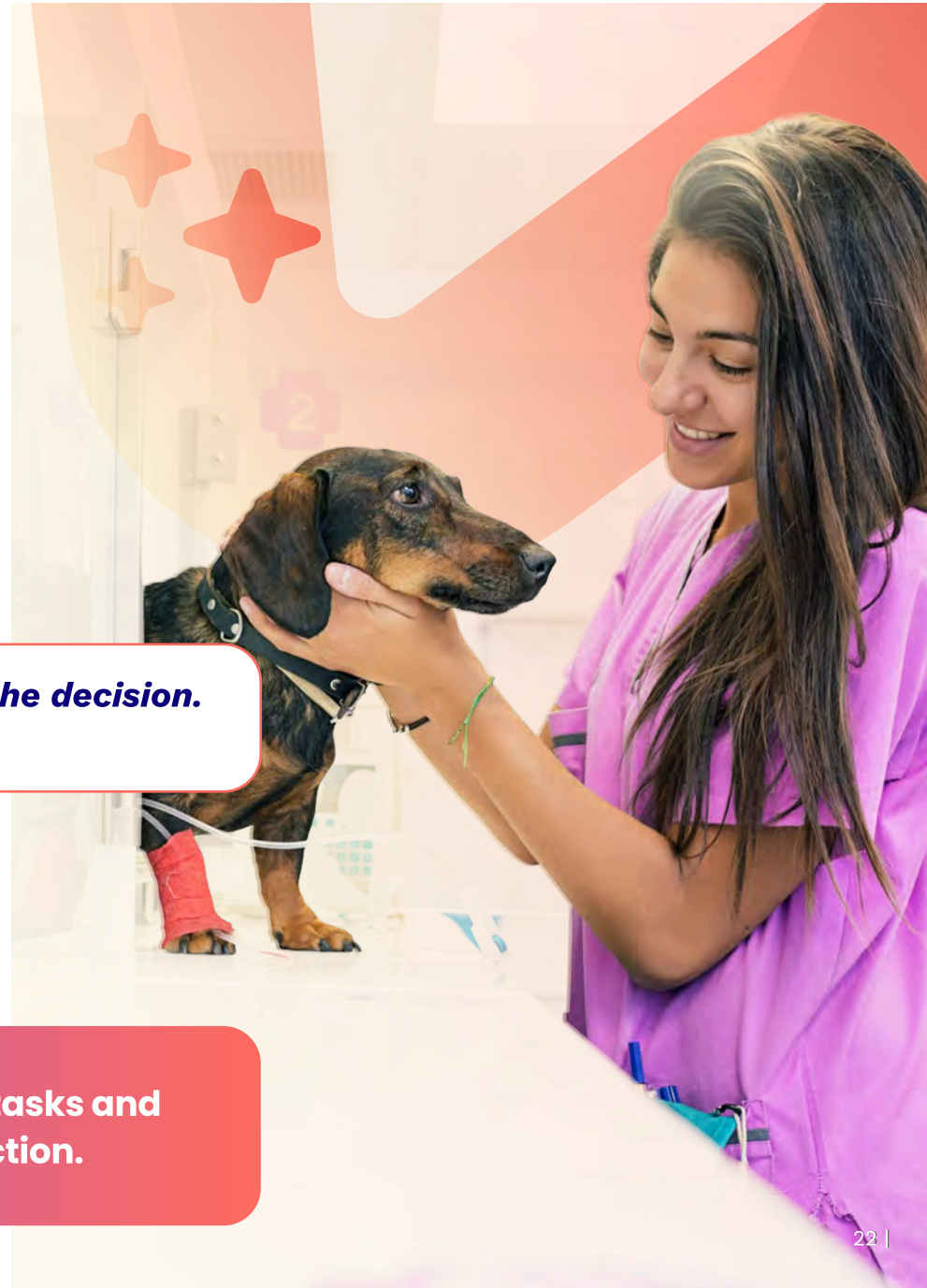
AI adoption across industries
Nuanced attitudes and unique challenges

👍 *Benefits of AI*
👎 *Challenges of AI*

Food Service

Operations 👍 | Customer interactions 👎

Hospitality

Streamline tools 👍 | Exclusion 👎

Healthcare

Admin support 👍 | Patient care 👎
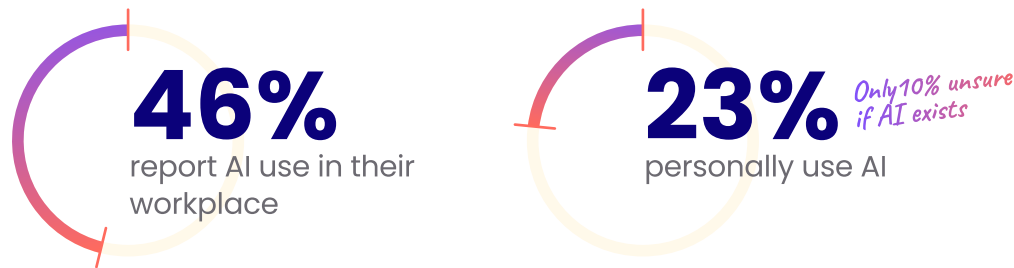

Retail

Automation 👍 | Optimism 👎

Country deep dives

United States: Cautious optimists with high expectations

AI has taken root more visibly in the United States than in the UK or Australia.

46%
report AI use in their workplace

23%
Only 10% unsure if AI exists

personally use AI

Only 10% are unsure whether AI exists, suggesting American workers have clearer visibility into workplace systems.

Satisfaction is stronger here than elsewhere. **97% of US workers say they are satisfied with AI, the highest among the three countries.** Optimism is also highest, though still cautious: 41% of US workers say they are optimistic about AI's role in their industry, compared to 35% in the UK and 36% in Australia.

Preparation is part of the difference. 14% of US workers say they were "very well prepared" for AI, the highest of the three countries, though still a small minority. Rights awareness is stronger too: 22% of US workers say they are fully aware of their rights when it comes to AI-driven data and decisions. This compares to 16% in the UK and only 12% in Australia.

Yet optimism comes with demands. 19% of US workers describe their employer as completely transparent, above the global average (17%), but still worryingly low. And 31% strongly demand more communication, again higher than the global average (27%).

One retail worker explained:

> *AI makes reordering easier, but it also makes things more complex. We end up shifting from one challenge to another without clarity."*
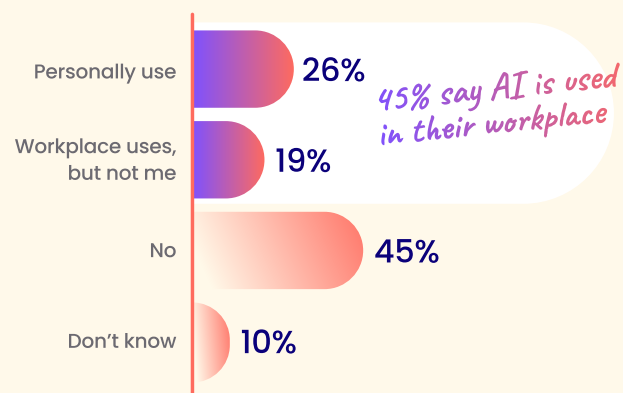
Another food service employee stressed:

> *The system is fine for stock and shifts, but we're still the ones keeping customers happy. That doesn't change."*

Human boundaries are still firmly drawn. **69% of US workers say human connection is essential**, and 60% strongly agree that empathy cannot be replaced.
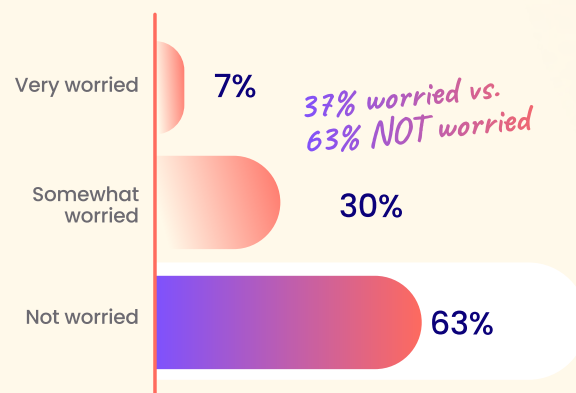
The US story, then, is one of cautious optimism. **Workers in the US are more satisfied and informed than their peers in other countries**, but they expect more transparency, training, and respect. Without it, their relative optimism could easily erode into mistrust.
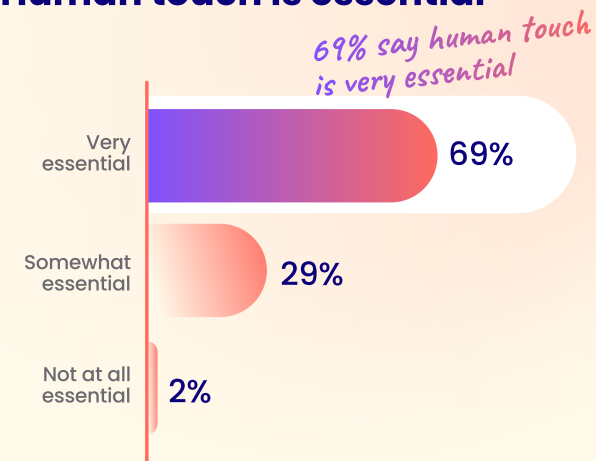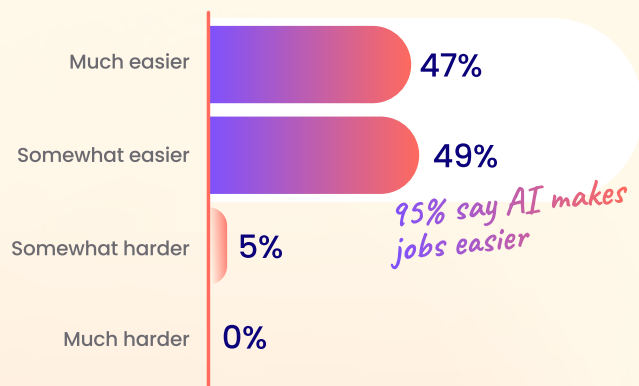
United States

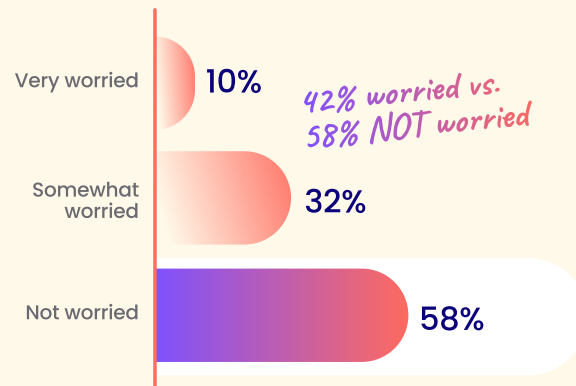## Adoption

Personally use — 26%

Workplace uses, but not me — 19%

No — 45%

Don't know — 10%

45% say AI is used in their workplace

Worried AI will replace jobs

Very worried — 7%

Somewhat worried — 30%

Not worried — 63%

37% worried vs. 63% NOT worried

Human touch is essential

69% say human touch is very essential

Very essential — 69%

Somewhat essential — 29%

Not at all essential — 2%

Job easier/harder

Much easier — 47%

Somewhat easier — 49%

Somewhat harder — 5%

Much harder — 0%

95% say AI makes jobs easier

Worried AI will reduce hours

Very worried — 10%

Somewhat worried — 32%

Not worried — 58%

42% worried vs. 58% NOT worried

Empathy cannot be replaced

60% strongly agree empathy cannot be replaced

Strongly agree — 60%

Agree — 35%

Disagree — 5%

Strongly disagree — 1%

United Kingdom: Sceptical defenders of empathy

In the UK, attitudes are more guarded.

47%
report AI use in their workplace

24%
personally use AI
About 10% are unsure

96% of UK workers report being satisfied with AI. Optimism is weaker still with only 35% saying they feel optimistic about AI's role in their industry.

The difference lies in values. **69% of UK workers say human touch is very essential, the highest across the three countries.** 58% strongly agree that empathy can never be replaced by AI — British workers are not anti-technology, but they are protective of frontline care.

A healthcare worker explained:

> **You can use AI for notes, for reminders — but when someone is scared or grieving, they want a human. Always."**

A shop worker said:

> **The computer can track the stock, but it can't smile, it can't joke, it can't reassure. That's what people expect from us."**

Trust figures show why scepticism grows. 17% of UK workers say their employer is fully transparent, and only 14% say they are always consulted before AI rollouts. Rights awareness is middling at 16%, which is better than Australia but lower than the US.
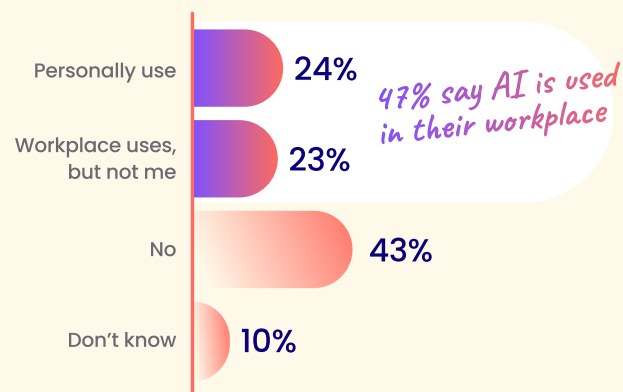
A retail employee summed it up:

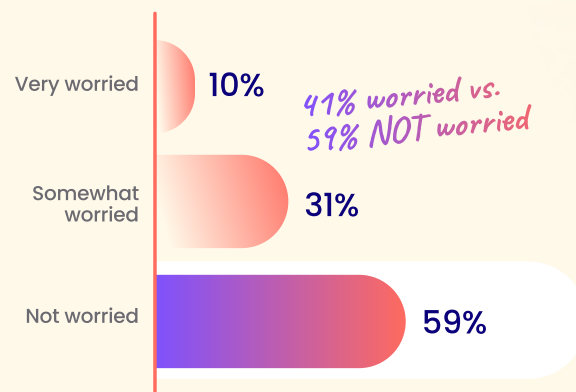> **AI isn't the issue. It's that no one tells us how it changes our jobs. That's why we don't trust it."**

The UK represents the toughest challenge for AI adoption. Workers here won't be swayed by efficiency alone. **For British staff, the test is empathy first, clarity second. Without both, AI will be met with scepticism.**
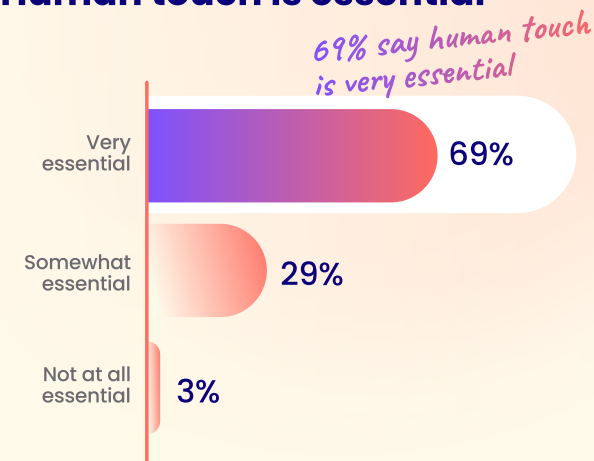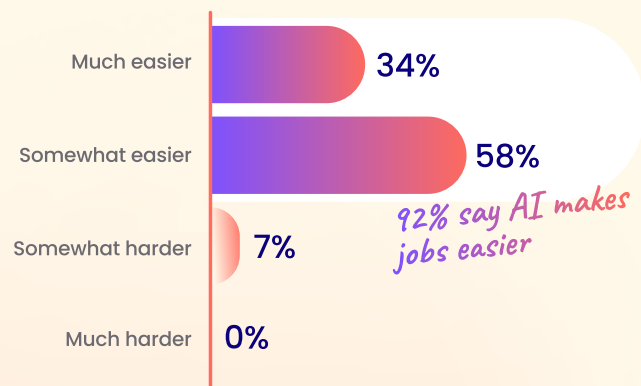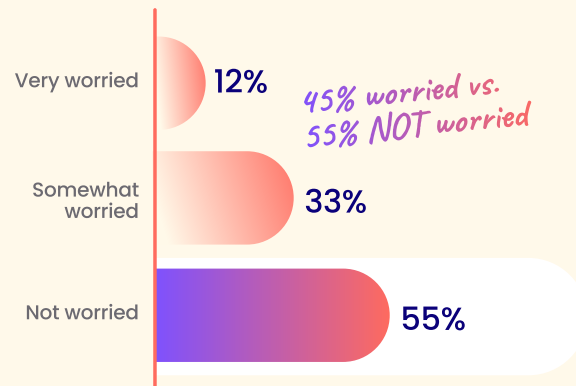
United Kingdom

Adoption

Personally use — 24%

Workplace uses, but not me — 23%

No — 43%

Don't know — 10%

47% say AI is used in their workplace

Worried AI will replace jobs

Very worried — 10%

Somewhat worried — 31%

Not worried — 59%

41% worried vs. 59% NOT worried

Human touch is essential

69% say human touch is very essential

Very essential — 69%

Somewhat essential — 29%

Not at all essential — 3%

Job easier/harder

Much easier — 34%

Somewhat easier — 58%

Somewhat harder — 7%

Much harder — 0%

92% say AI makes jobs easier

Worried AI will reduce hours

Very worried — 12%

Somewhat worried — 33%

Not worried — 55%

45% worried vs. 55% NOT worried

Empathy cannot be replaced

58% strongly agree empathy cannot be replaced

Strongly agree — 58%

Agree — 35%

Disagree — 6%

Strongly disagree — 1%

Australia: Balanced but wary

Australia is between the US and the UK, both statistically and emotionally.

51%
report AI use in their workplace *the highest of the three countries*

25%
personally use AI *39% say no AI is present, and 10% are unsure*
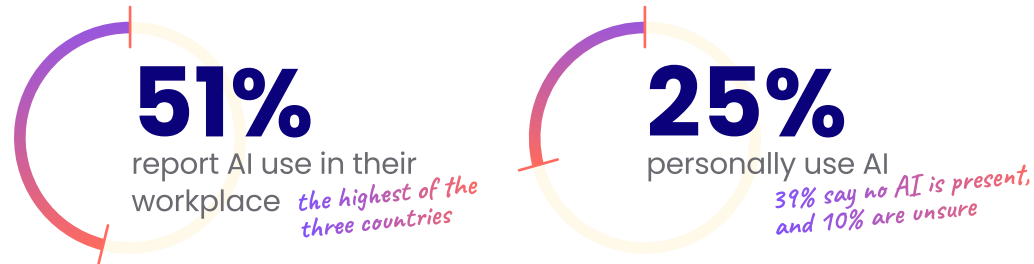
Satisfaction is steady: 94% say they are satisfied. Optimism is moderate: 36% are optimistic about AI's role in their industry. These figures almost mirror the global averages, placing Australia in the "average adopter, average sceptic" category.

But beneath the surface are vulnerabilities. Only 9% of Australian workers say they were very prepared for AI, the lowest of the three countries. Rights awareness is also weakest, with just 12% of Australians saying they are fully aware of their rights.

This lack of preparation makes Australian workers fragile adopters. They are neither strongly opposed nor strongly supportive, but their cautious balance could quickly tip toward mistrust without support.

Human boundaries are emphasised here, too. **66% of Australians say human touch is very essential**, and 60% strongly agree that empathy can't be replaced.

Comments reveal concerns about relationships, for example, one hospitality worker said:

> *AI can be useful, but if it gets between us and the guest, it fractures the relationship."*

Another retail worker added:

> *We're not against new systems. But we need training. Right now, changes happen overnight and we're left behind."*

Transparency figures highlight the fragility. Only 16% of Australians say their employer is fully transparent, and only 13% say they are always consulted about AI rollouts. Workers accept AI when it's explained, but resist when it arrives unannounced.
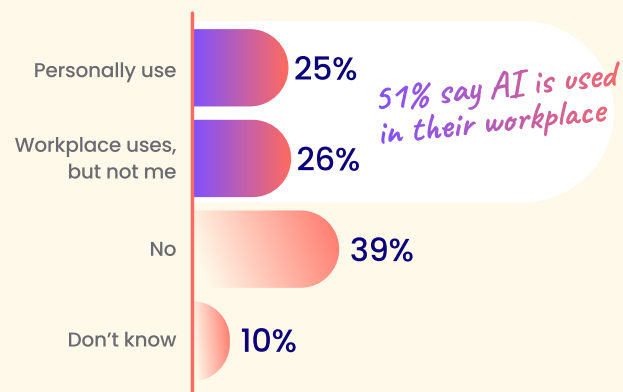
An Australian shop worker put it simply:

> *"If you explain it, we'll go with it. If you don't, we'll push back."*
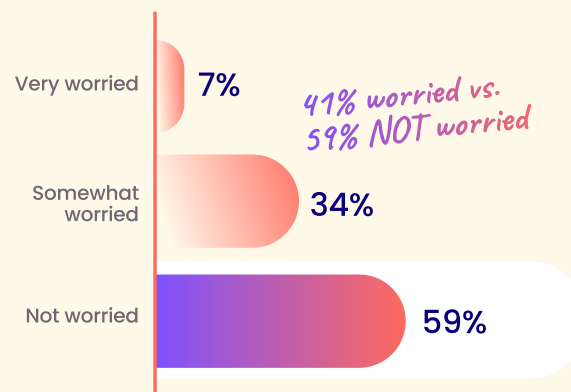
Australia

Australian workers report only moderate satisfaction and optimism — yet they remain the least prepared and informed. For employers, there is a clear opportunity: with the right training, transparency, and open dialogue, moderation can be transformed into momentum. Without it, that caution risks solidifying into mistrust.
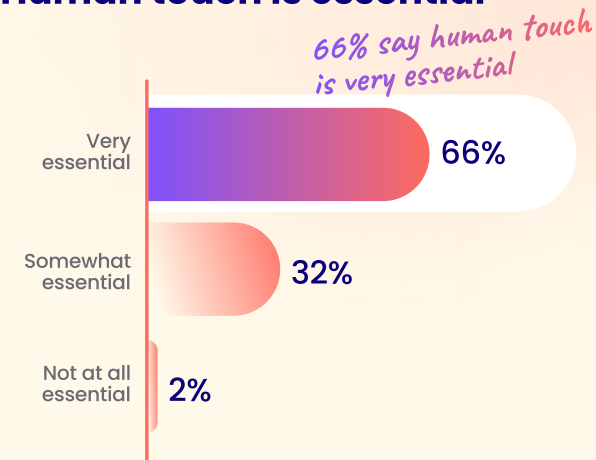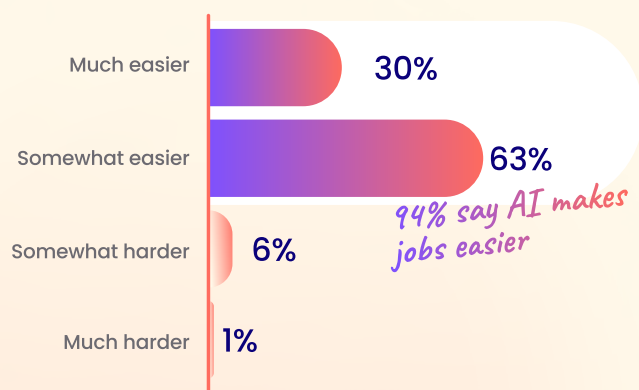
Adoption

Personally use — 25%
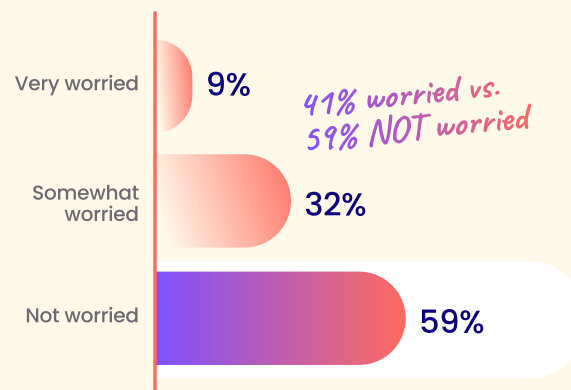Workplace uses, but not me — 26%
No — 39%
Don't know — 10%

51% say AI is used in their workplace

Worried AI will replace jobs

Very worried — 7%
Somewhat worried — 34%
Not worried — 59%

41% worried vs. 59% NOT worried

Human touch is essential

66% say human touch is very essential

Very essential — 66%
Somewhat essential — 32%
Not at all essential — 2%

Job easier/harder

Much easier — 30%
Somewhat easier — 63%
Somewhat harder — 6%
Much harder — 1%

94% say AI makes jobs easier

Worried AI will reduce hours

Very worried — 9%
Somewhat worried — 32%
Not worried — 59%

41% worried vs. 59% NOT worried

Empathy cannot be replaced

60% strongly agree empathy cannot be replaced

Strongly agree — 60%
Agree — 34%
Disagree — 5%
Strongly disagree — 1%

Regional summary

The three countries together form a spectrum of frontline attitudes toward AI:

- **United States:** The most satisfied (97%) and most optimistic (41%), with the strongest preparation (14% "very well prepared") and rights awareness (22% "completely aware"). Workers are cautiously optimistic but demand transparency and respect.

- **United Kingdom:** Workers are highly satisfied (96%), but the least optimistic (35%). They are the strongest defenders of empathy (69% say human touch is essential, 58% say empathy cannot be replaced). Workers are sceptical, viewing empathy as the heart of frontline work.

- **Australia:** Workers are the least satisfied (94%) of the three regions. While optimism towards AI (36%) is moderate, Australian workers are the least prepared (9%) and least aware of rights (12%). Workers are balanced but fragile, vulnerable to mistrust if left uninformed.

While national culture influences how workers perceive AI, the same conditions hold true across borders. Transparency, consultation, and the defence of empathy remain the cornerstones of trust.

The country's deep dives show that while AI adoption is global, its reception is deeply local. Americans expect clarity, Brits demand empathy, and Australians seek preparation.

> **Each country speaks differently, but together they agree on the same principle: AI will only be accepted if implemented with honesty, care, and respect for humanity.**

Global AI adoption attitudes
A tale of three nations

United States

Most satisfied
97%
satisfied

Most optimistic
41%
optimistic

Most prepared
14%
prepared

Highest awareness of rights
22%
rights awareness

Cautiously optimistic

United Kingdom

96%
satisfied

Least optimistic
35%
optimistic

10%
prepared

16%
rights awareness

Sceptical and empathetic

Australia

Least satisfied
94%
satisfied

36%
optimistic

Least prepared
9%
prepared

12%
rights awareness
Lowest awareness of rights

Balanced but fragile

Generational perspectives: The age of AI

Gen Z: Hopeful but insecure

AI is not new for Gen Z (18–28); it is expected. They grew up with recommendation algorithms, predictive search, and digital assistants. Their comfort level is high: 43% of Gen Z workers report significant satisfaction with AI, and 42% say they are optimistic about its future role. Both figures are above the global average.

Yet their optimism comes with insecurity. Many are entry-level employees, learning how to manage shifts, deal with customers, and build workplace confidence. When AI takes over tasks like stock checks, payments, or routine questions, some fear they are losing the chance to develop vital skills.

As one 23-year-old retail worker put it:

> **AI makes things smoother, but I worry it leaves us with nothing to learn. If the system does the thinking, how do we grow?"**
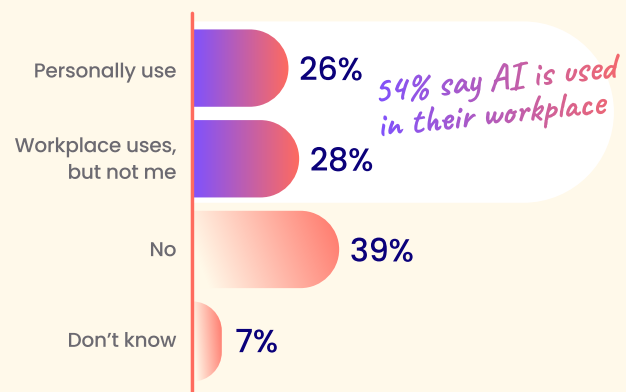
INSIGHT

For Gen Z, AI is welcome when it supports them, but threatening when it takes away opportunities to build competence. Employers need to pair AI with training, ensuring young workers gain interpersonal and problem-solving skills alongside digital tools.
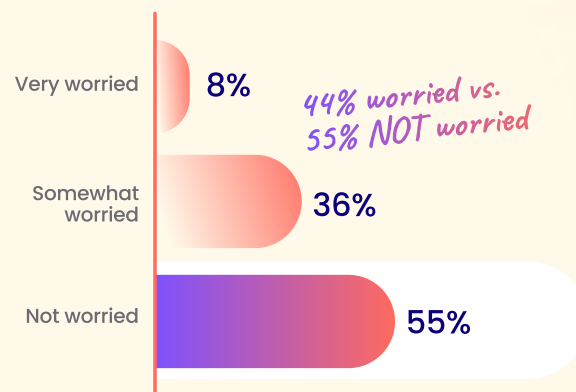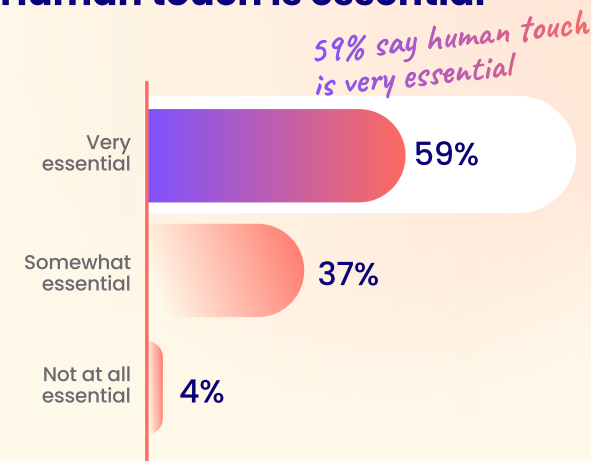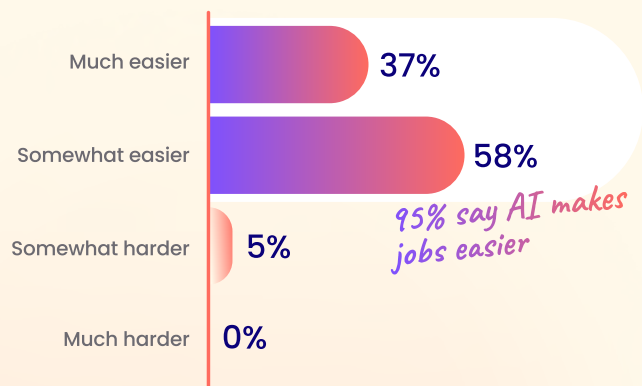
Gen Z

Adoption

Personally use — 26%
Workplace uses, but not me — 28%
No — 39%
Don't know — 7%

54% say AI is used in their workplace

Worried AI will replace jobs

Very worried — 8%
Somewhat worried — 36%
Not worried — 55%

44% worried vs. 55% NOT worried

Human touch is essential

59% say human touch is very essential

Very essential — 59%
Somewhat essential — 37%
Not at all essential — 4%

Job easier/harder

Much easier — 37%
Somewhat easier — 58%
Somewhat harder — 5%
Much harder — 0%

95% say AI makes jobs easier

Worried AI will reduce hours

Very worried — 12%
Somewhat worried — 35%
Not worried — 53%

47% worried vs. 53% NOT worried

Empathy cannot be replaced

60% strongly agree empathy cannot be replaced

Strongly agree — 60%
Agree — 33%
Disagree — 5%
Strongly disagree — 2%

Millennials: Pragmatic adopters

Millennials (29–44) are the most positive cohort overall. 47% say they are satisfied with AI, and **44% are optimistic, the highest of any generation.**

They straddle two worlds: entering the workforce before AI was widespread, but fluent enough to see its potential. They've already developed core skills, so they feel less threatened by the automation of entry-level tasks compared to Gen Z.

A 33-year-old hospitality worker wrote:

> *The booking system cuts down on paperwork, which is good. But the guest still remembers the person who welcomed them. That won't change."*

A nurse in her 30s added:

> *AI is useful for admin, but the patient relationship stays with us."*

Millennials see AI as a partner, not a replacement. They are practical — technology should take care of the drudgery, so they can focus on meaningful work.
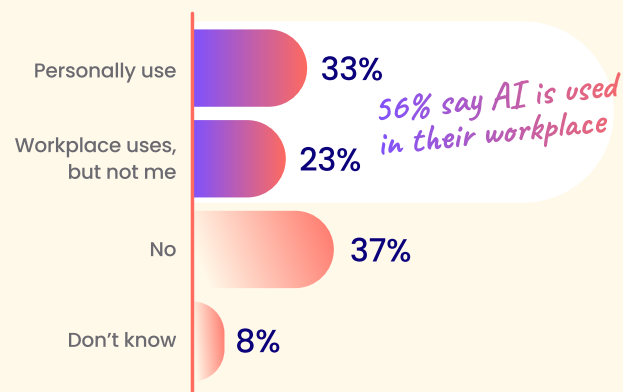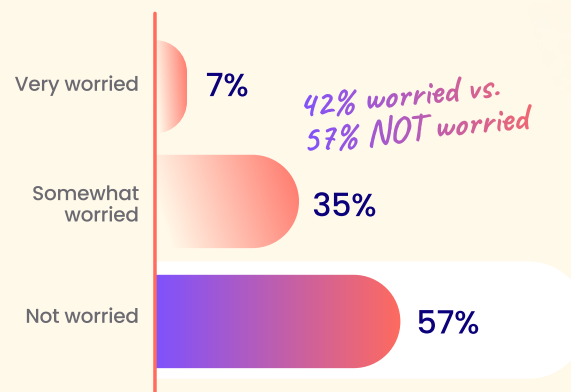
INSIGHT
Millennials are the "bridge builders" of adoption. Employers should empower them as peer advocates and trainers, helping bring both older and younger colleagues along.
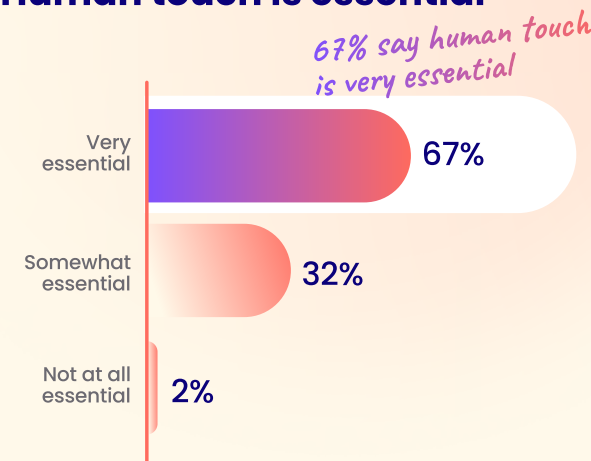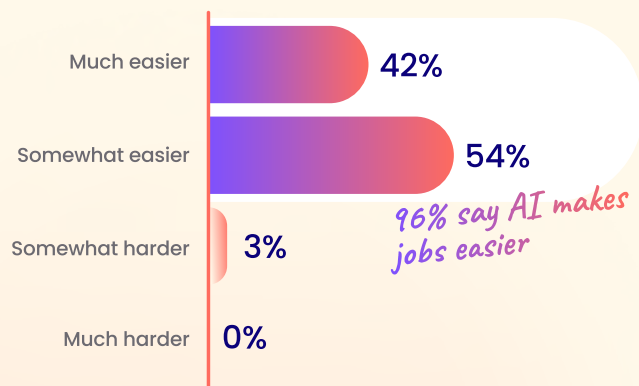
Millennials

Adoption

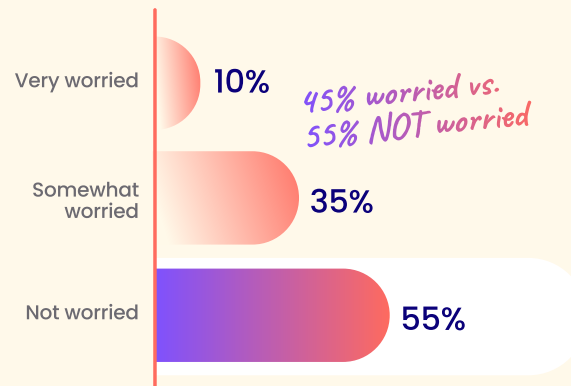|	
Personally use	33%
Workplace uses, but not me	23%
No	37%
Don't know	8%

56% say AI is used in their workplace

Worried AI will replace jobs

Very worried	7%
Somewhat worried	35%
Not worried	57%

42% worried vs. 57% NOT worried

Human touch is essential

67% say human touch is very essential

Very essential	67%
Somewhat essential	32%
Not at all essential	2%

Job easier/harder

Much easier	42%
Somewhat easier	54%
Somewhat harder	3%
Much harder	0%

96% say AI makes jobs easier

Worried AI will reduce hours

Very worried	10%
Somewhat worried	35%
Not worried	55%

45% worried vs. 55% NOT worried

Empathy cannot be replaced

56% strongly agree empathy cannot be replaced

Strongly agree	56%
Agree	38%
Disagree	5%
Strongly disagree	1%

Gen X: Wary realists

Gen X (45–58) is the most sceptical generation. Only 35% report significant satisfaction, and **33% are optimistic, the lowest percentages across generations.**

Their scepticism comes from experience. Many lived through repeated "silver bullet" tech rollouts, new tills, new scheduling apps, and HR systems that often created more problems than they solved.

A 49-year-old retail manager explained:

> **AI is fine when it works, but when it glitches, we're the ones cleaning up. It adds as much stress as it saves."**

A healthcare worker in her 50s added:

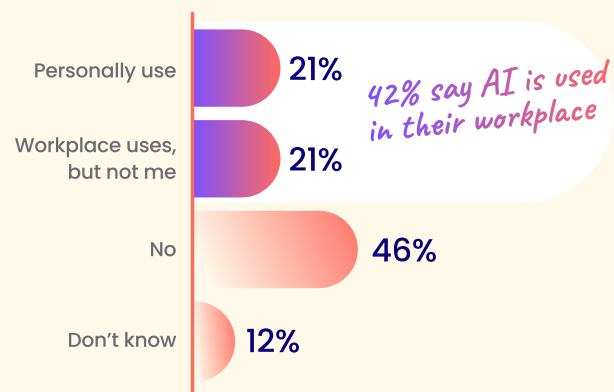> **We've had tech pushed on us before. Most of the time, it's more work, not less."**

INSIGHT
Gen X does not reject AI outright. They simply demand proof of real benefit. Before talking about transformation, employers must show measurable outcomes, such as shorter queues, smoother rostering, and faster stock checks.
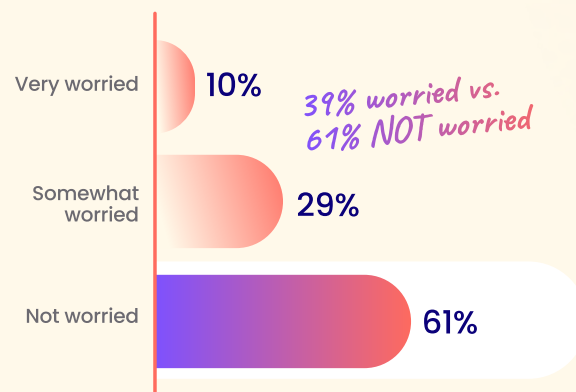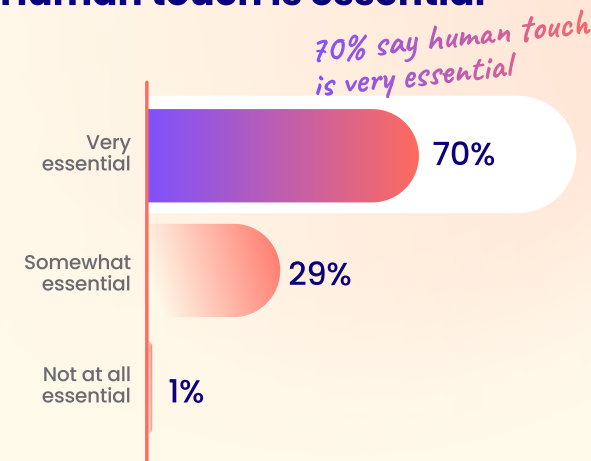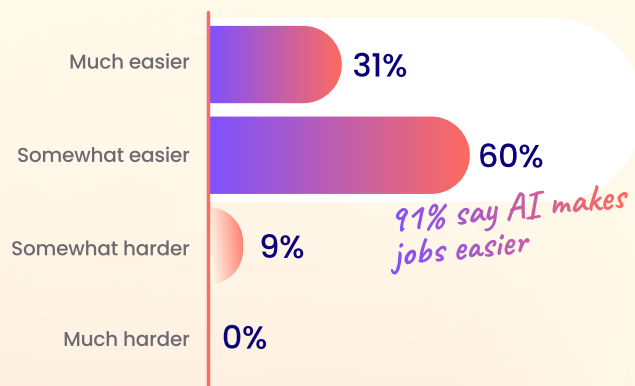
Gen X

Adoption

Personally use — **21%**

Workplace uses, but not me — **21%**

No — **46%**

Don't know — **12%**

42% say AI is used in their workplace

Worried AI will replace jobs

Very worried — **10%**

Somewhat worried — **29%**

Not worried — **61%**

39% worried vs. 61% NOT worried

Human touch is essential

70% say human touch is very essential

Very essential — **70%**

Somewhat essential — **29%**

Not at all essential — **1%**

Job easier/harder

Much easier — **31%**

Somewhat easier — **60%**

Somewhat harder — **9%**

Much harder — **0%**

91% say AI makes jobs easier

Worried AI will reduce hours

Very worried — **11%**

Somewhat worried — **33%**

Not worried — **56%**

44% worried vs. 56% NOT worried

Empathy cannot be replaced

55% strongly agree empathy cannot be replaced

Strongly agree — **55%**

Agree — **38%**

Disagree — **6%**

Strongly disagree — **1%**

Boomers: Defenders of empathy

Boomers (59+) are the least optimistic about AI's future. 39% report satisfaction, but only 24% say they are optimistic about AI in their industry.

Their caution is not about efficiency but about values. **70% strongly agree that empathy can't be replaced by AI, the highest of any generation.**

A 62-year-old healthcare worker explained:

> *Patients don't want a tablet or a kiosk. They want someone to look them in the eye and reassure them."*

A long-tenured retail worker said:

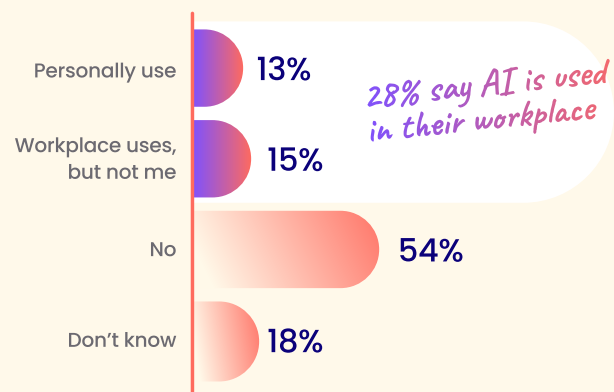> *AI can speed up processes, but it cannot give empathy. That's our job."*

INSIGHT

Boomers act as the moral anchors of the workforce. Their defense of empathy shapes team culture, especially since they often hold senior or long-tenured positions. Employers must explicitly acknowledge empathy as non-negotiable if they want this group's support.
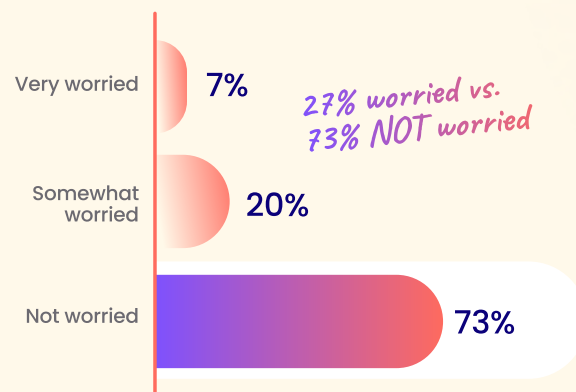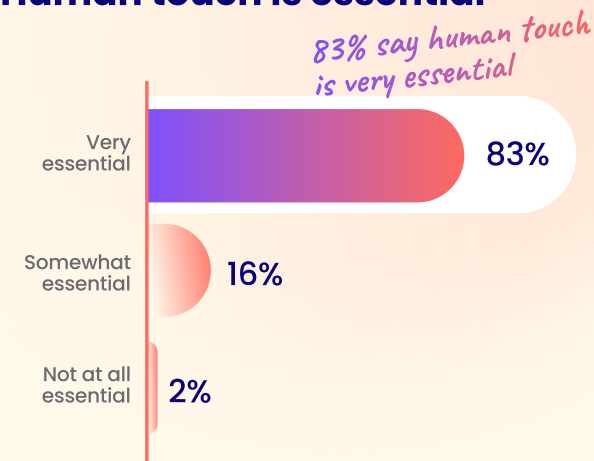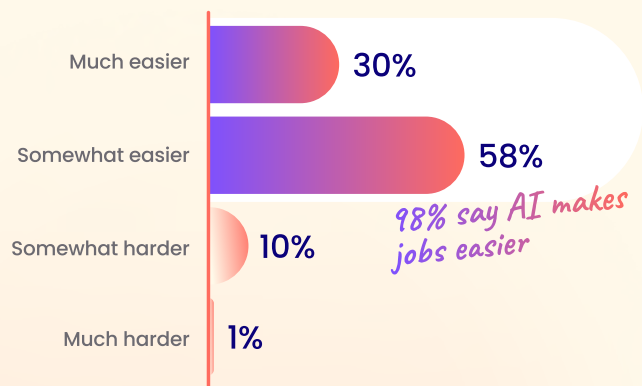
Boomers

Adoption

Personally use — 13%
Workplace uses, but not me — 15%
No — 54%
Don't know — 18%

28% say AI is used in their workplace

Worried AI will replace jobs

Very worried — 7%
Somewhat worried — 20%
Not worried — 73%

27% worried vs. 73% NOT worried

Human touch is essential

83% say human touch is very essential

Very essential — 83%
Somewhat essential — 16%
Not at all essential — 2%

Job easier/harder

Much easier — 30%
Somewhat easier — 58%
Somewhat harder — 10%
Much harder — 1%

98% say AI makes jobs easier

Worried AI will reduce hours

Very worried — 7%
Somewhat worried — 20%
Not worried — 73%

27% worried vs. 73% NOT worried

Empathy cannot be replaced

70% strongly agree empathy cannot be replaced

Strongly agree — 70%
Agree — 26%
Disagree — 4%
Strongly disagree — 0%

Multi-generational workplaces

When we put the generations side by side:

- **Gen Z — Insecure optimists**
  Excited about AI but still figuring it out and worried about opportunities being threatened.

- **Millennials — Pragmatic adopters**
  Confident in AI's potential and less fazed by widespread adoption.

- **Gen X — Sceptical realists**
  Cautious attitudes and require proof before trusting AI.

- **Boomers — Empathy defenders**
  Care deeply about the human side of work; AI is a tool that will never replace empathy.

These divides can create tension within teams. A Gen Z worker may embrace an AI ordering system, while their Gen X supervisor grumbles about glitches, and their Boomer colleague insists on face-to-face service.

Employers must design rollouts that address each group's perspective, for example providing training for Gen Z, empowering Millennials, offering evidence for Gen X, and providing assurances regarding empathy for Boomers.

Gender, tenure, and work type

Gender: Efficiency vs. empathy

Gender divides reveal contrasting perspectives on AI. Men are more likely to be satisfied (45%) and optimistic (45%) about AI than women (40% satisfied, 32% optimistic).

Men's comments often highlight efficiency, speed, and problem-solving:

> **AI helps track stock better than people — it saves us from mistakes."**

By contrast, women place stronger emphasis on empathy. 63% strongly agree that AI cannot replace empathy, compared to lower figures among men (53%).
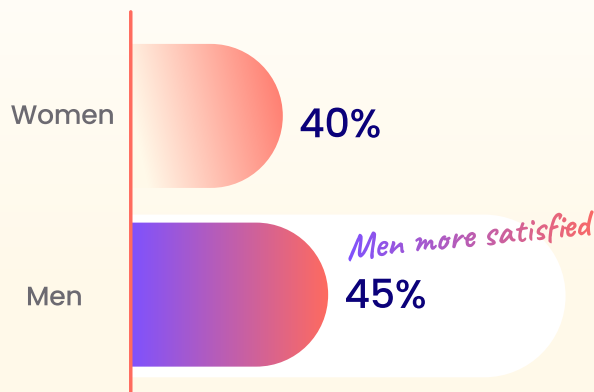
INSIGHT
This divide reflects structural roles. Women dominate healthcare and hospitality, where empathy is core to the job. Men are more concentrated in retail and food service, where efficiency and throughput are prized.
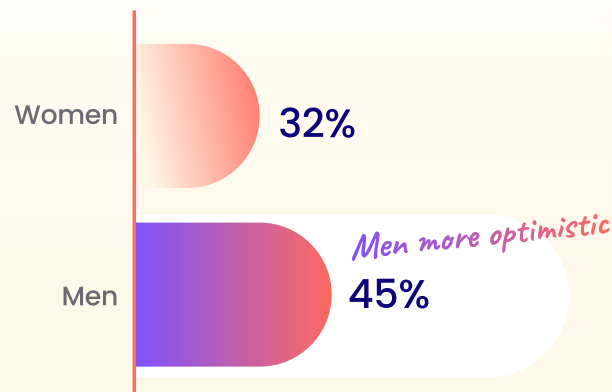
IMPLICATION
Employers must tailor rollout messaging. Efficiency narratives resonate in male-dominated kitchens, and empathy assurances are essential in female-dominated wards.

Satisfaction with AI by gender
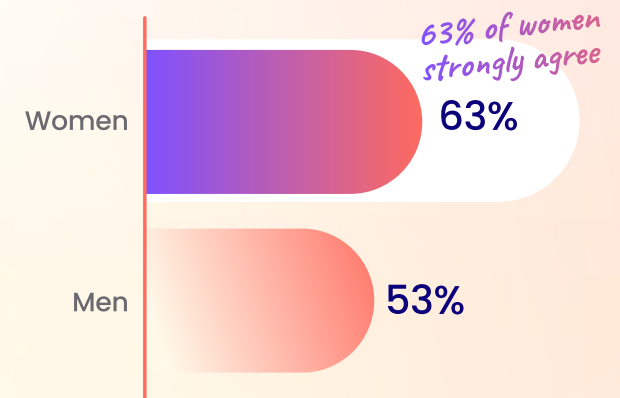
Women **40%**

Men *Men more satisfied* **45%**

Optimism about AI by gender

Women **32%**

Men *Men more optimistic* **45%**

Empathy cannot be replaced (strongly agree)

Women *63% of women strongly agree* **63%**

Men **53%**

Tenure: Optimism falls, empathy rises

Tenure produces another striking divide.

35%
with less than
2 years of experience
are optimistic

Only **26%**
with 10+ years
of experience are
optimistic *but 68% strongly agree that empathy cannot be replaced*

Why? Newcomers are more open; they haven't experienced past systems that failed to deliver. Veterans, by contrast, carry organisational memory of overhyped technology that rarely delivered.
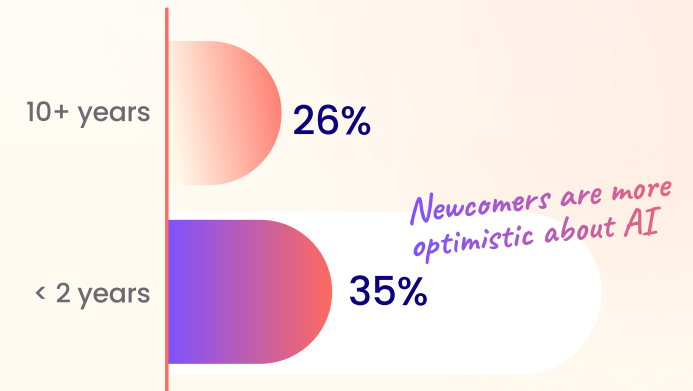
A retail worker with 12 years of experience said:

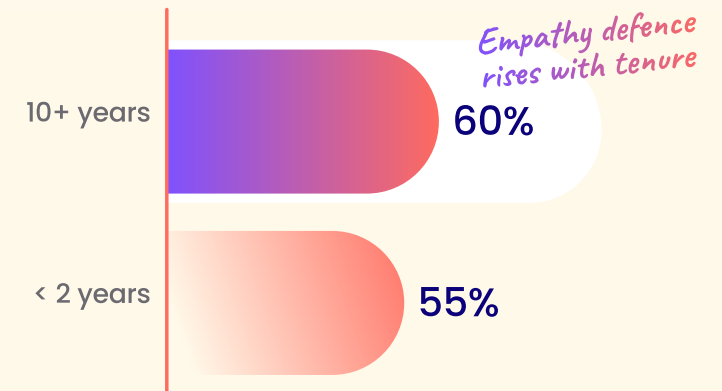> **We've seen new tools before. Most fade away, and we're left with more hassle."**

INSIGHT
Long-tenured staff often act as informal leaders. If they resist, the whole team may follow. Employers must respect their experience, acknowledge past disappointments, and prove this time is different.

Optimism about AI by tenure

10+ years — 26%

< 2 years — 35%

Newcomers are more optimistic about AI

Empathy cannot be replaced (strongly agree)

10+ years — 60%

Empathy defence rises with tenure

< 2 years — 55%

Work type: Risk of a two-tiered workforce

Employment type shapes exposure to AI. Part-time workers are consistently less informed. Only 9% of part-time employees report full awareness of their rights, compared to 20% of full-time workers.

A part-time food service worker explained:

> ❝
> *We turn up and find new systems in place. Nobody tells us. We just have to figure it out."*

This exclusion creates risk. Casual staff are often the most customer-facing yet the least trained, which undermines confidence, service quality, and trust.

Rights awareness (fully aware)

Full-time staff more informed than part-time

Full-time staff 20%

Part-time staff 9%
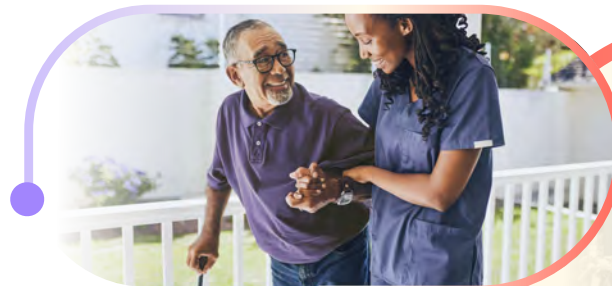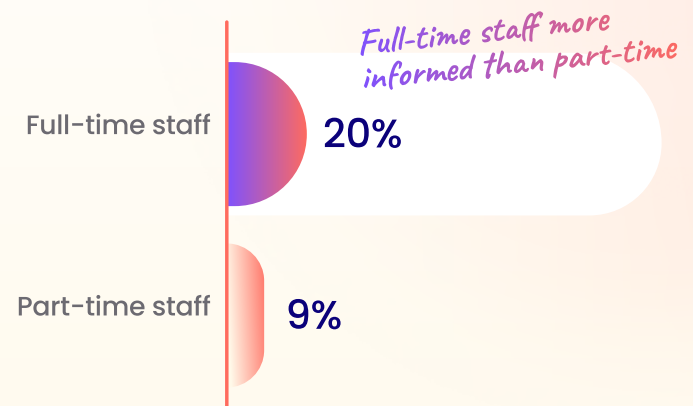
INSIGHT
AI adoption risks creating a two-tier workforce: insiders (trained full-time staff) and outsiders (casuals left behind). This deepens mistrust and drives turnover in already precarious roles.
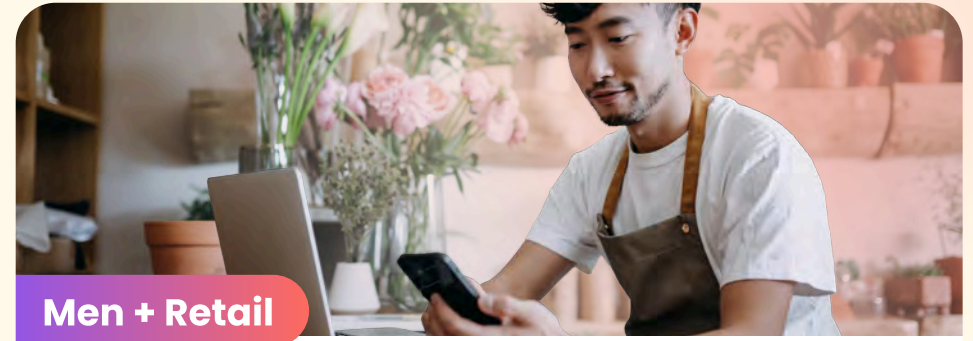
Overlaps: When demographics collide

These divides don't exist in isolation; they overlap in ways that intensify adoption challenges.

Women + Healthcare

Strong defenders of empathy who lack trust in AI

Men + Retail

Optimistic about efficiency gains, but demand greater transparency

Gen Z + Part-time

AI-hopeful but insecure about skill growth

Boomers + Long-tenure

Less optimistic about AI and strongly value empathy

INSIGHT
AI adoption will succeed or fail not in abstraction but in these overlapping realities. Employers must recognise plural adoption journeys and tailor strategies by age, gender, tenure, and work type.

Demographic deep dives

The demographic deep dives reveal one truth: workers do not approach AI as a single, uniform group — they bring their histories, values, insecurities, and priorities.

For employers, the lesson is simple but demanding: AI adoption must be approached through multiple lenses:

- **To engage Gen Z, show career pathways.**
- **To mobilise Millennials, empower them as advocates.**
- **To reassure Gen X, provide evidence of real benefits.**
- **To respect Boomers, defend empathy as untouchable.**
- **For women, emphasise care; for men, highlight efficiency.**
- **For long-tenured veterans, acknowledge history; for newcomers, build growth opportunities.**

Across all these divides, one constant emerges: empathy is defended everywhere. However, the road to trust looks different for each group. Success will come not from ignoring these differences but from embracing them with tailored strategies.

Key takeaways and recommendations for employers

Industry

Food Service: Efficiency welcomed, empathy protected.
Workers see value in kiosks and smart kitchens, but insist the human connection cannot be replaced.

Hospitality: Transparency is higher, but fears of replacement.
AI is visible in bookings and smart rooms. Workers acknowledge its utility but fear losing the warmth that defines hospitality.

Healthcare: Admin assist only, empathy untouchable.
AI is welcomed for scheduling and records but rejected for patient care. Across all industry sectors, the belief that human connection is essential is the highest.

Retail: Visible automation, deep mistrust.
Self-checkouts and chatbots are common. Employer transparency and optimism are the lowest of all industries, and they strongly demand more communication.

Country

United States: Cautious optimism.
Satisfaction (97%) and optimism (41%) are highest. Preparation (14% "very well prepared") and rights awareness (22%) are stronger than elsewhere. However, expectations are high; 25% strongly demand more communication.

United Kingdom: Skeptical guardians of empathy.
Workers are highly satisfied (96%), but the least optimistic (35%). Human connection is most strongly defended (69%), and empathy is seen as irreplaceable (58%). Workers demand honesty and clarity above all else.

Australia: Balanced but fragile.
Satisfaction (94%) and optimism (36%) are near global averages. But preparation (9%) and rights awareness (12%) are the weakest. Workers are vulnerable to mistrust if left uninformed.

Generation

Gen Z (18–28):
42% optimistic (above average), but insecure about skill development. AI risks stunting growth unless paired with training.

Millennials (29–44):
Most positive (47% satisfied, 44% optimistic). See AI as a partner, a natural peer, who advocates for adoption.

Gen X (45–58):
Least optimistic (33%), demand evidence before trust. Sceptical after decades of failed "silver bullet" tech.

Boomers (59+):
Only 24% optimistic, but 70% vigorously defend empathy, moral anchors of the workforce.

Demographics

Gender:
Men are more optimistic (45%) and emphasise efficiency. Women (32% optimistic) defend empathy more strongly (63% say it cannot be replaced).

Tenure:
Optimism decreases with experience. Workers with 10+ years' tenure are the least optimistic (26%) but the strongest defenders of empathy (60%).

Work type:
Part-time workers are the least informed, with only 9% fully aware of their rights compared to 20% of full-time staff. Exclusion risks create a two-tier workforce.

1 ## Build transparency as a standard, not a bonus

Transparency must be a baseline condition. Workers expect clarity about what tools are being introduced, why, and with what impact. Employers should:

- Publish plain-language explanations of new AI systems.
- Share anticipated impacts on roles, shifts, and responsibilities.
- Report regularly on outcomes (e.g., time saved, error reduction).

2 ## Consult workers early and often

Consultation cannot be an afterthought. When only 15% are always consulted, mistrust is inevitable. Employers should:

- Involve frontline representatives before decisions are made.
- Run pilot programs with worker feedback loops.
- Treat consultation as co-design, not tokenism.

3 ## Train inclusively and repeatedly

Workers consistently describe being left behind. Employers should:

- Provide structured, repeated training for all staff, not just full-time.
- Ensure part-time and casual staff receive equal inclusion.
- Pair AI training with human skill development for Gen Z.

4 ## Defend empathy explicitly

Workers will not compromise on human connection. Employers should:

- Acknowledge that empathy is irreplaceable.
- Frame AI as a support for care, never a substitute.
- Ensure customer- or patient-facing roles remain human-led.

5 ## Tailor rollouts to demographics

Adoption strategies must be plural, not uniform. Employers should:

- Highlight **career growth** for Gen Z.
- Empower **Millennials** as champions.
- Show **evidence of impact** on Gen X.
- Respect **Boomers' defence of empathy**.
- Emphasise **efficiency** in male-dominated teams, **care** in female-dominated ones.

6 ## Close the rights awareness gap

With only 17% globally aware of their rights, employers must:

- Provide clear guidance on data use, algorithmic decision-making, and appeal processes.
- Ensure rights awareness training is part of onboarding.
- Build policies in consultation with staff and unions where present.

The frontline verdict

The lesson from this study is clear — AI can either be rolled out invisibly, bypassing staff, fracturing trust, and deepening divisions, or it can be implemented openly and consultatively, putting people first and fostering efficiency, resilience, confidence, and care.

Workers do not fear AI at work if it is implemented with communication and transparency. The demand for a voice, empathy, and fairness is of the utmost importance.

That is the frontline verdict.

Methodology

The research findings are based on a survey conducted by Walr between August 21 and September 11, 2025. In total, 1,500 global workers completed the survey, which targeted hourly shift workers in the Hospitality, Foodservice, Retail, and Healthcare industries across the US, UK, and Australia.

The survey covered topics related to AI use in the workplace.

Respondents were recruited through a number of different mechanisms, via different sources, to join the panels and participate in market research surveys. All panellists have passed a double opt-in process and complete on average 300 profiling data points prior to taking part in surveys. Respondents are invited to take part via email and are provided with a small monetary incentive for doing so. Results of any sample are subject to sampling variation. The magnitude of the variation is measurable and is affected by the number of interviews and the level of the percentages expressing the results. In this particular study, the chances are 95 in 100 that a survey result does not vary, plus or minus, by more than 0.8 percentage points from the result that would be obtained if interviews had been conducted with all persons in the universe represented by the sample. Due to this, some charts will not add up to 100% in all instances.

Shift Workers + AI
BETTER TOGETHER

deputy