



UNLOCKED 2025

RIDING THE AI SHOCKWAVE



GLOBAL RESEARCH

AT THE LEADING EDGE OF
BRAND COMMUNICATIONS

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Welcome from RWS's CEO

We are entering a defining moment, one where AI's potential is no longer theoretical but an essential driver of business transformation. The hype has given way to real-world implementation, and now, businesses must navigate the complexities of trust, transparency and measurable ROI.

At RWS, AI is not new to us, it has been embedded in our DNA for decades. We pioneered AI-powered translation with Language Weaver in 2003 and have been a leader in AI data training services since 2017 and our expertise in both technology and human insight is shaping the next era of global content and communication.

The research in this report highlights a powerful truth: businesses that integrate AI responsibly and transparently, combining automation with human expertise, will be the ones to gain lasting trust. Our work at RWS reflects this commitment. We are harnessing LLMs to enhance our core products, from Evolve and Trados Copilot assisting Language Specialists globally to Tridion's GenAI features boosting content authors' productivity.

At the same time, we are pioneering Agentic AI to drive greater efficiency while maintaining the quality that global enterprises expect.

But AI's impact extends beyond efficiency, it's fundamentally changing how brands connect with people. As this report shows, global consumers now demand AI content that is labelled, localized and culturally relevant. Organizations must rise to this challenge, ensuring that their AI-powered interactions are not only seamless but also trusted. We're proud to be at the forefront of this revolution, trusted to help the globe's leading enterprises break down barriers, unlock new markets and build trust at scale.

This report offers crucial insights into the evolving AI landscape, the trust challenges that businesses must overcome and the strategies that will define AI's next chapter. I invite you to explore our findings and to join us in shaping a future where AI and human expertise work together to drive innovation, growth and understanding.



Ben Faes
CEO, RWS

The age of expectations

The AI landscape has evolved at breakneck speed over the past 24 months. The number of generative AI companies worldwide is forecast to skyrocket from 50,000 in 2023 to 100,000 by year end 2025¹.

AI companies accounted for one third of total global venture capital funding in 2024² and almost half of all new unicorn businesses (valued over one billion dollars)³.

AI is transforming innovation across industries, making it increasingly challenging to stay ahead of the curve in this rapidly changing technological landscape.

Our new research across 14 global markets highlights remarkable enthusiasm and experimentation with generative AI. It also sets out the essential ingredients for long-term adoption: transparency, explainability and human involvement.

No more hiding

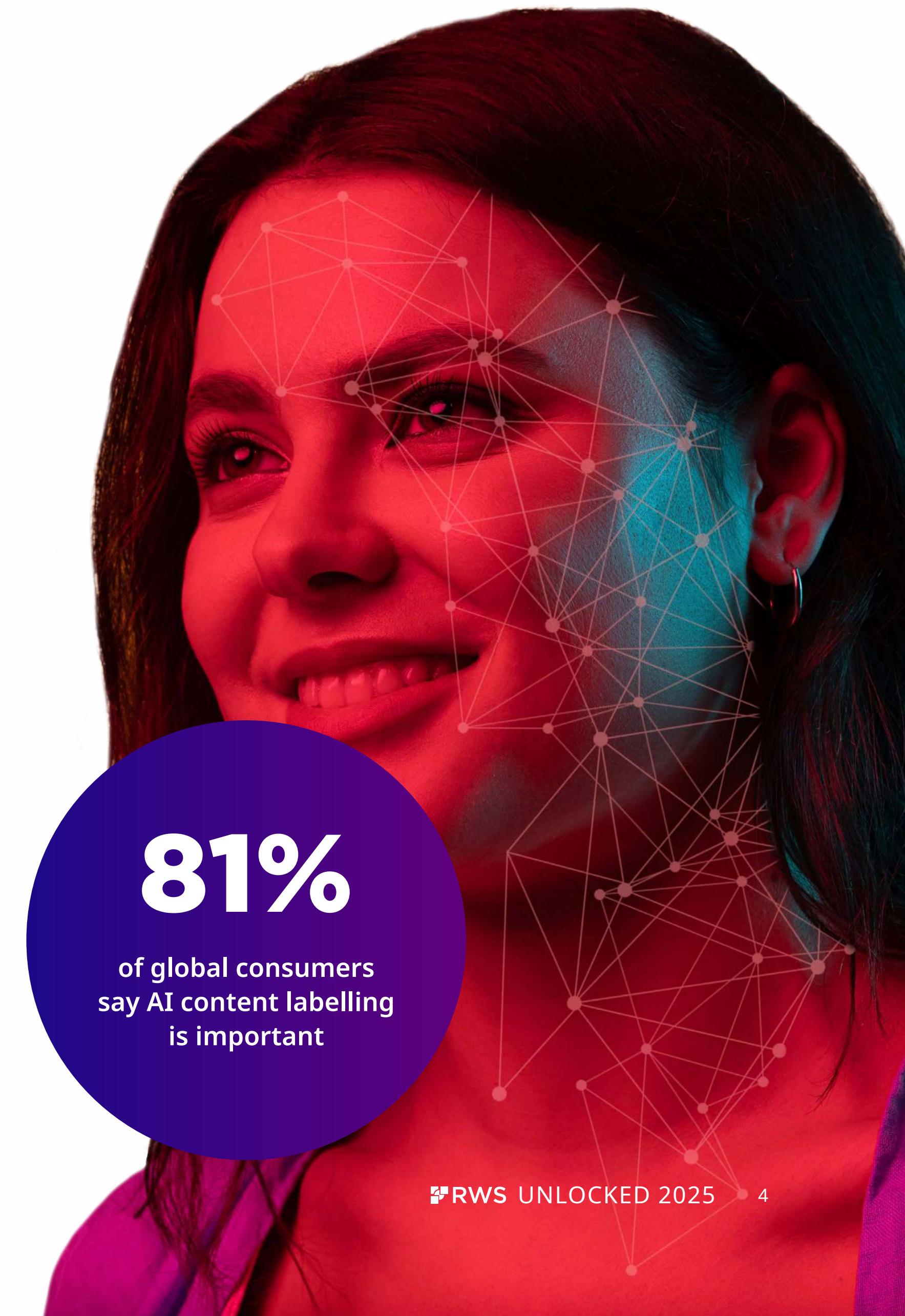
In a world where 'distrust is the new norm'⁴, consumers want businesses to be upfront about their use of AI. They want to know when they are interacting with AI content, chatbots and the like.

They want AI content to be better labelled and explained – including the invaluable role that humans play in developing AI tools.

Brands that get this right will benefit from a consumer trust dividend.

AI is everywhere...

Around 70% of global consumers are already seeing an increase in AI-generated content from brands, businesses – and bad actors – ranging from text and images, to video and voice. This trend will only accelerate as autonomous AI agents⁵ handle more content management decisions, adapting multilingual content in real-time to users' needs.



81%

of global consumers
say AI content labelling
is important

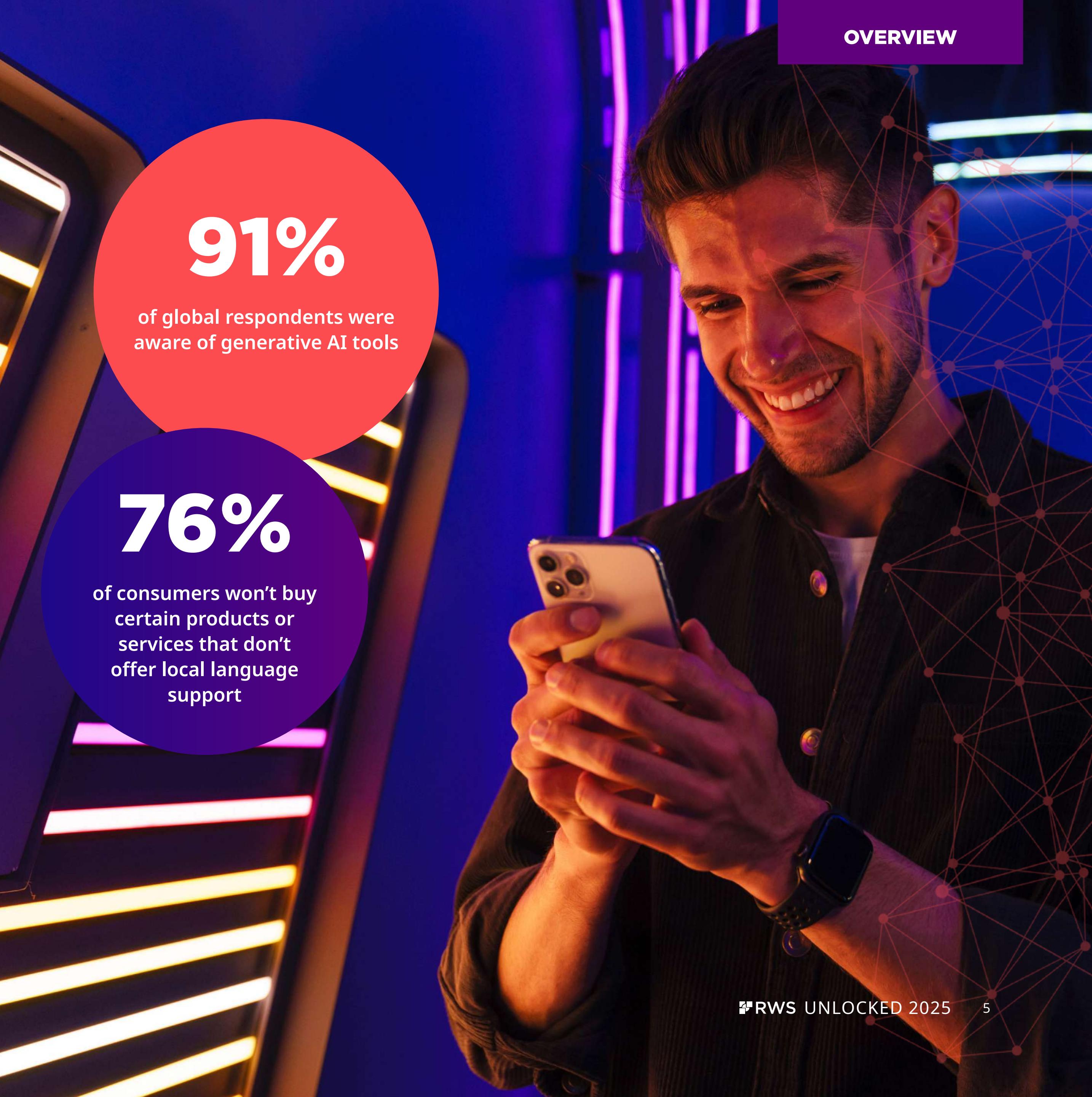
1 - [How Many Generative AI Startups Are There: Latest Statistics In 2025](#)

2 - [The State Of Startups In 12 Charts](#)

3 - [Nearly 1 in 2 new unicorns is an AI company.](#)

4 - [Edelman CEO](#)

5 - [Three-minute explainer on... agentic AI](#)



...or is it?

Without transparency, consumers struggle to distinguish AI-generated content from human-created material. While a small majority of global consumers expressed some confidence in their ability to do so, the results from our image tests were no better than a coin toss...

Speaking my language

Consumers overwhelmingly expect brands to communicate in their preferred language. They believe real-time translation should be standard in customer support and that brands must demonstrate cultural understanding. AI adoption remains uneven due to gaps in local language models – this needs to improve.

Mind the gap

Despite distrust and grievance dominating the 2025 consumer landscape⁶, attitudes toward AI's potential remain positive.

Expectations are high. Brands, technologists, innovators and communicators must rise to meet them – integrating AI responsibly, strengthening governance, ensuring regulatory compliance, proving return-on-investment – all while giving people high-quality experiences that speak to their personal context. Only by building trust can we unlock AI's potential for the benefit of everyone.

SURVEY HIGHLIGHTS

96%

of consumers say automatic real-time translation should be a customer service norm

73%

would feel uncomfortable with the use of AI for translation in at least one (regulated) industry

81%

say it's important that AI-generated content (including chatbots) is clearly labelled

60%

of B2B buyers say B2B brands are lagging consumer brands in translation and localization

80%

of B2B buyers are more likely to engage with a B2B brand that uses AI for translation

84%

of those who care about AI would have more trust in AI that explains its outputs and decisions

91%

of consumers say it's important for global brands to show cultural insight

82%

of those who care about AI would have more trust if humans are involved in tool development

76%

of consumers won't buy certain products or services that don't offer local language support

62%

of all respondents would have more trust in brands that are transparent about their use of AI

Methodology

DEPTH INTERVIEWS

WITH RWS SUBJECT MATTER EXPERTS



Maria Schnell
Chief Language Officer



Matt Hardy
SVP Linguistic AI



Ben Middleton
Principal Architect



Frank Closset
Head of Product
Tridion



Sharon Du Toit
Language Delivery
Director



Thomas Labarthe
President,
Content Technologies

INTERNATIONAL SURVEY

4901
CONSUMERS

14
MARKETS

20
LANGUAGES

MARKETS

Brazil, Canada, France, Germany, Ghana, India, Indonesia, Japan, Kenya, Nigeria, South Africa, South Korea, UK, USA

LANGUAGES

Afrikaans, Akan, English, English (US), Ewe, French, French (CAN), German, Hausa, Hindi, Igbo, Indonesian, Japanese, Korean, Portuguese, Spanish, Swahili, Xhosa, Yoruba, Zulu

Respondents include a robust global sample of B2B buyers in full time employment or self-employment (self-declared)

SURVEY SCRIPTING, FIELDWORK AND DATA OUTPUTS

78%

of survey respondents were confident (58%) or good (21%) English speakers

36%

of all respondents were aged 18-34, 35% aged 35-54 and 29% aged 55+

58%

of all respondents are full-time employees, self-employed or business owners

63%

of this working audience are involved in B2B purchase decisions

Please note that not all chart totals will add up to exactly 100% due to data rounding

EXTERNAL EXPERT INSIGHTS PROVIDED BY



Key themes

**ONE**

PERSPECTIVE IS EVERYTHING

While consumers in mature economies tread with caution, the Global South leads the way in AI enthusiasm, fuelled by youthful experimentation and a thirst for opportunity.

[FIND OUT MORE](#)**TWO**

THREE PILLARS OF AI TRUST

By focusing on AI transparency, explainability and human involvement, businesses can bridge gaps in consumer trust.

[FIND OUT MORE](#)**THREE**

FROM DEFICIT TO DIVIDEND

AI isn't just for cost cutting – it's an opportunity to earn trust by meeting rising consumer expectations for quality, accuracy and reliability.

[FIND OUT MORE](#)**FOUR**

BEYOND WORDS

AI offers brands vast potential for personalized multi-modal communication, where voice, video and gesture build deeper human connections.

[FIND OUT MORE](#)**FIVE**

NATIVE IS THE NEW NORMAL

Localization and cultural insight are no longer optional – they're essential to meet rising consumer expectations and compete with in-market players.

[FIND OUT MORE](#)

A woman with dark hair is laughing joyfully, her head tilted back and eyes closed. She is wearing a red hoodie. A large, glowing pink circle containing a white outline of a heart is positioned near her chest. The background is a vibrant gradient from purple to orange, with a network of pink dots and lines floating around her head.

ONE

**PERSPECTIVE
IS EVERYTHING**

Our research shows that young people in emerging markets are embracing AI while mature market audiences hesitate. As Western debates emphasize risk, a new generation across Africa, Asia and Latin America is advocating for AI as a tool for opportunity, self-improvement and economic empowerment.

Shifting attitudes in the Global South

There's a long-standing optimism gap between the Global South and wealthier nations when it comes to new technology. Emerging markets are typically quicker to adopt and more open to change and AI is no exception⁷.

In 2019, many sub-Saharan African audiences were sceptical of AI⁸. Fast-forward to 2025 and generative AI is seen as a game-changer, driving innovation and new opportunities across industries.

Easy as chat

So, what changed? In a word: accessibility.

OpenAI's ChatGPT, with its user-friendly interface, has democratized access to AI for anyone with a smartphone and internet. Freemium models have made it possible to experiment with powerful AI models at zero cost.

As a result, AI has become an empowering tool for anyone to enhance their creativity, efficiency and productivity.



55%

of global respondents have
experimented with ChatGPT
(26% with Gemini,
22% with CoPilot)

7 - What's in a name?

8 - A Digital World: Perceptions of risk from AI and misuse of personal data



WHAT DO YOU VALUE MOST ABOUT INTERNET ACCESS?

Appetite for learning

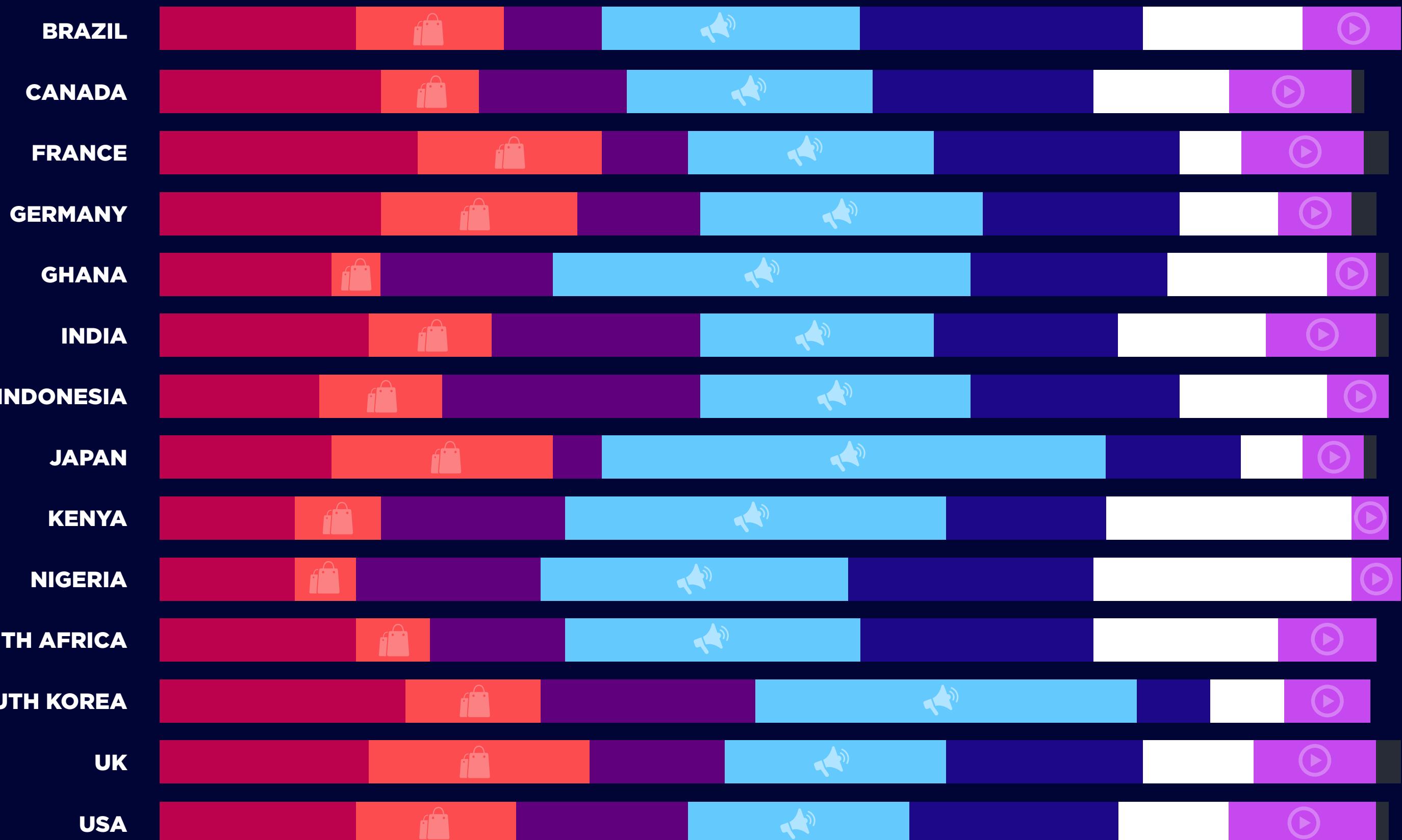
Emerging markets are leading the charge in self-education, hungry for knowledge and digital skills. Compared to their European and American counterparts, respondents from Africa and Asia are 40% more likely to say access to online learning is the biggest benefit of the internet.

That hunger for knowledge translates to AI, as **Riedwaan Bassadian, Principal Data and AI Specialist, Microsoft South Africa**, puts it



Microsoft

"Africa's greatest resource is its young, dynamic population. Their enthusiasm for emerging technologies, particularly AI, is fuelling a wave of grassroots innovation, of doing more with less resources. This often translates to AI-savvy workers and tangible solutions for local challenges faced, like agriculture, healthcare, education and business development."



● MAKES LIFE SIMPLER

● MAKES SHOPPING CONVENIENT

● FEEL CONNECTED TO THE WORLD

● EASIER INFORMED/LEARN NEW THINGS

● EASIER TO COMMUNICATE WITH FRIENDS/FAMILY

● CONNECT WITH NEW PEOPLE OR EXPERIENCES'

● ENTERTAINMENT AT A CLICK

● NONE OF THE ABOVE

SUMMARY AGE BANDS BY MARKET

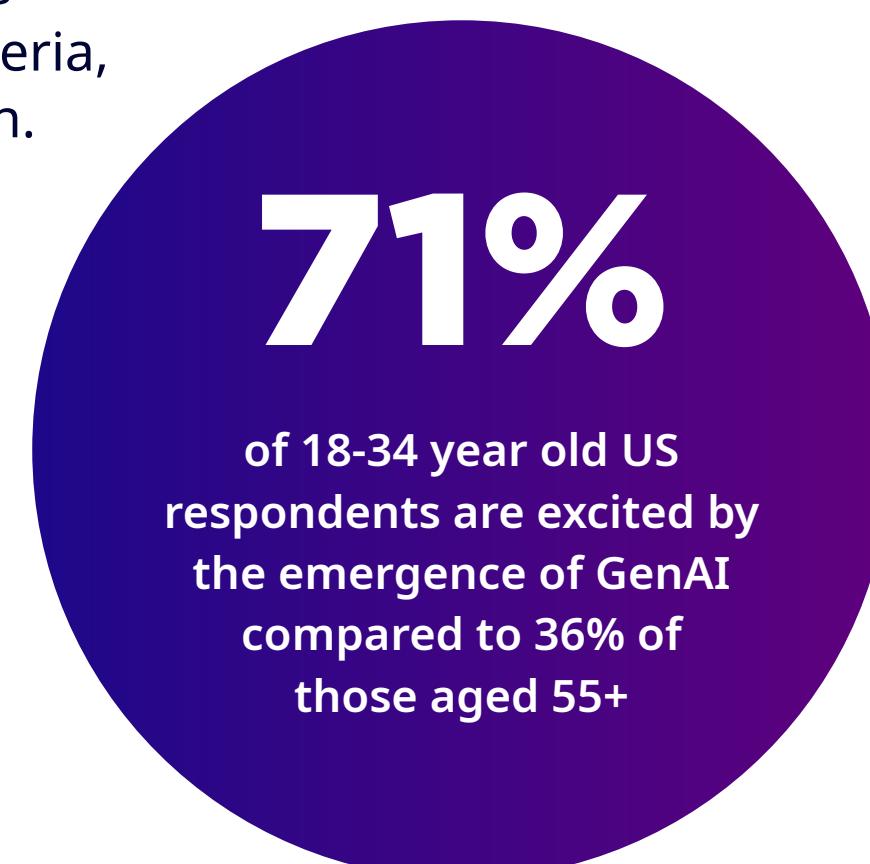
Everything to gain

In Western markets, the AI debate is often driven by fear of loss – of jobs, control and creativity. But in regions where secure employment is less of a given, AI offers everything to gain. People in emerging economies see AI not as a threat, but as a tool for progress, encouraging people to engage and experiment.

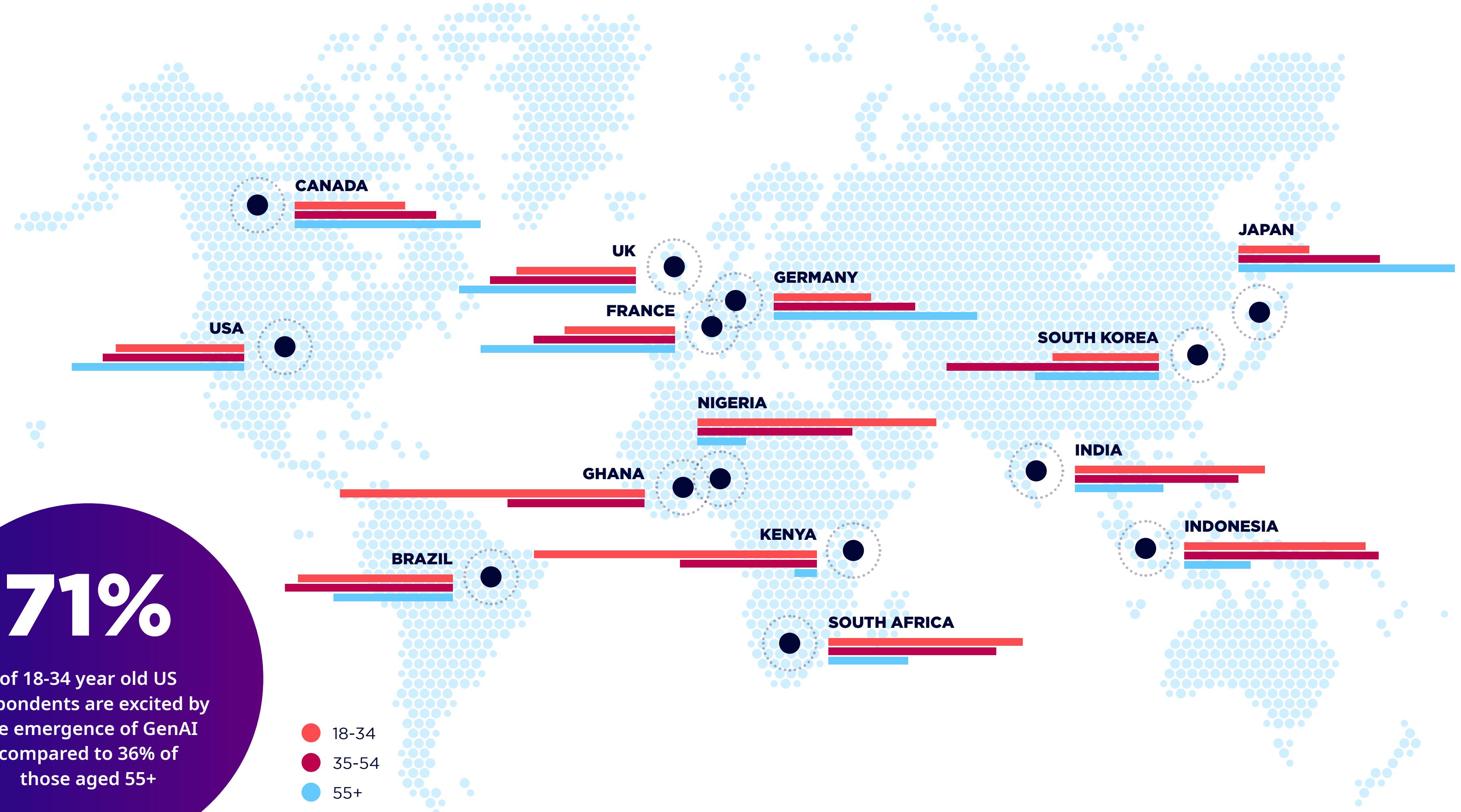
Age and attitude

AI enthusiasm isn't just about geography – it's about age. Africa is home to the world's youngest populations, with median ages of 20 in Ghana, Kenya and Nigeria, compared to nearly 50 in Japan.

In developed markets, younger people (18-34) are far more positive about generative AI than older generations.



- 18-34
- 35-54
- 55+

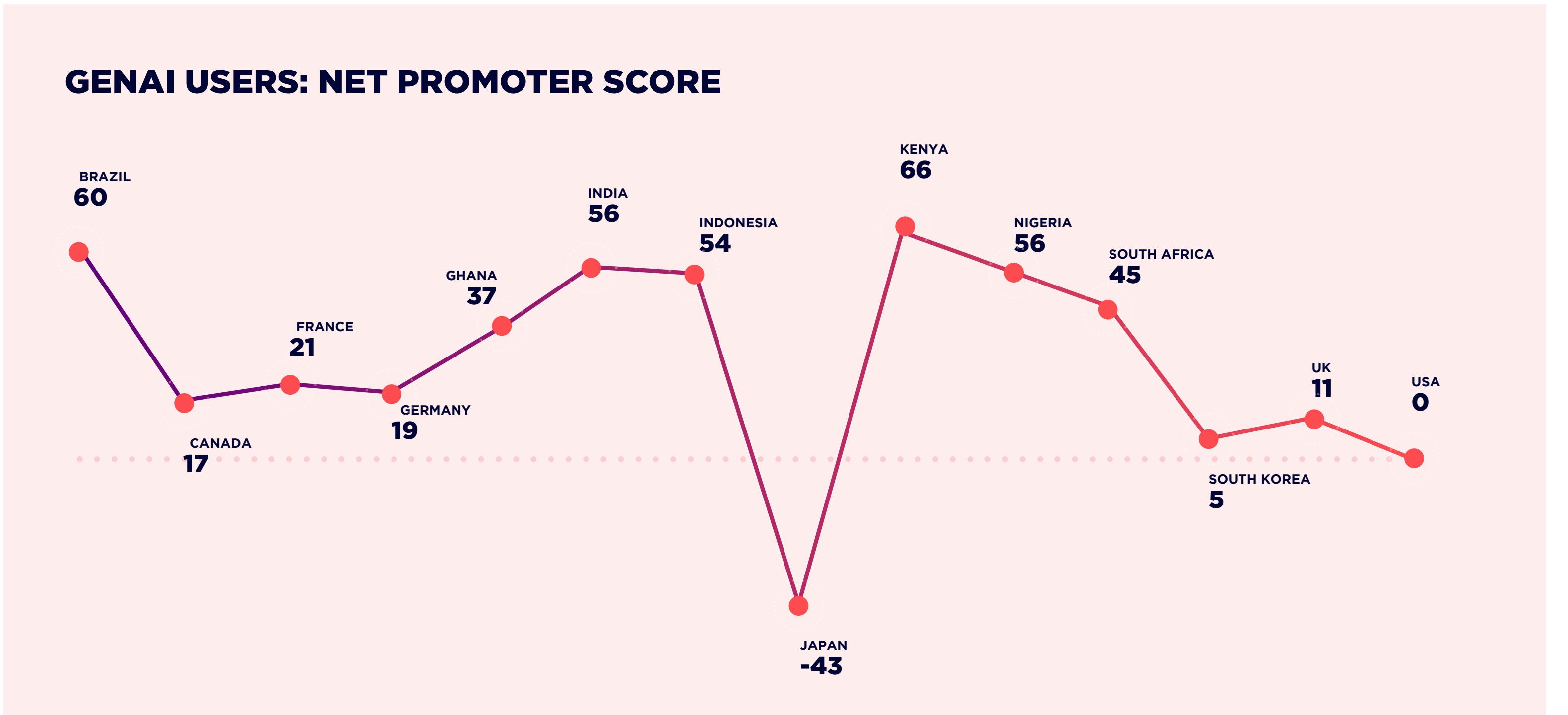


Digital natives

In general, the younger you are, the more time you spend online. And more time online means more exposure to AI. Over half of 18-34-year-olds spend 6+ hours online daily, compared to just a third of over-55s. One in five global consumers now spend 10+ hours a day online – a figure even higher among GenAI pioneers⁹, 50% of whom are aged 18-34.

Friend of a friend

AI adoption spreads fast through word-of-mouth recommendations. Today, trust in peers far outweighs trust in media, business or government. The Net Promoter Score (NPS)¹⁰ among AI users in Kenya is +66, while in Japan it's -43. Confidence in English comprehension – 82% in Kenya, versus 8% in Japan – also plays a role. In the USA, the NPS sits at neutral (0).



9 - GenAI pioneers: Interested and Active with GenAI and used 1+ tools and spent time experimenting

10 - [What is NPS? The ultimate guide to boosting your Net Promoter Score](#)

40%

of Kenyan respondents are spending 10+ hours a day online compared to just 6% of French respondents



The fear factor

The more people use GenAI, the more positively they feel about it¹¹. Older respondents in developed markets, who have spent less time experimenting, are far more likely to say they find AI scary.

Consumers, just like businesses, want assurance when interacting with AI systems. They want transparency and protection. And they want to know that they work as they should. Trust is fragile – one bad experience can go viral, triggering a backlash that sets adoption back years.

Sharon du Toit, Language Delivery Director

for RWS's language team in South Africa explains:



RWS

"There is a major drive across Africa to digitize access to healthcare, especially for remote regions and communities. This won't work unless everything is correctly translated, tested and fully intelligible to all users. The quality of our inputs will be key to delivering the high-quality outputs required for success."



59%
of UK respondents agree
that 'they find AI quite scary'
compared to just 17% of
Kenyan respondents

11 - Earning trust as GenAI takes hold

12 - Three-minute explainer on... agentic AI

13 - What the data says about Americans' views of artificial intelligence

TAKEAWAY

To win over sceptics, brands should focus on utility – showing how AI can make life easier, more productive and more creative. 71% of respondents now say they benefit from AI in their daily life. While agentic AI already promises to take care of people's admin¹², a majority of US consumers would be excited about AI if it could do the household chores¹³.

A close-up profile of a man's head and shoulders. His hair is dark and slightly messy. A complex network of red dots connected by lines is overlaid on his hair and neck area, suggesting a digital or AI connection. In the bottom right corner of the image, there is a red circle containing a white icon of three stylized human figures standing together.

TWO

THREE PILLARS OF AI TRUST

HOW MUCH DO YOU CARE IF A DEVICE OR APP USES AI?

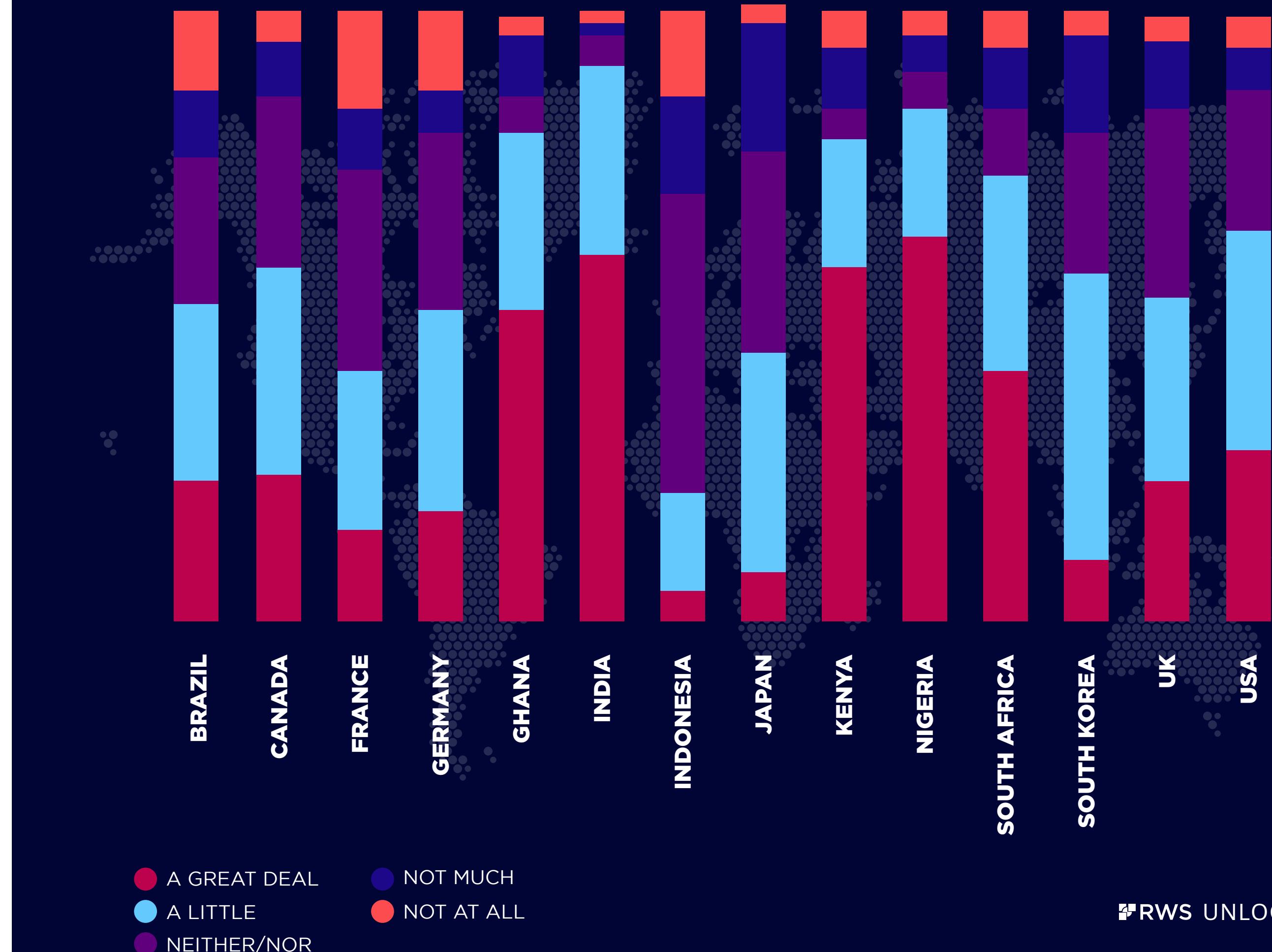
Not everyone cares how AI is used. But among those who do, trust is pivotal.

Our research uncovers three pillars for fostering trust in AI: **transparency, explainability and human involvement**. By focusing on these, businesses can bridge gaps in consumer confidence and encourage greater engagement.

Who cares?

Overall 61% of our global consumers say they care about the use of AI in their devices and applications. This ranges from a high of 91% in India to a low of 21% in Indonesia and includes a European average of 47%.

Note that over 70% of 18-34 year olds say that they care about the use of AI compared to 48% of those aged 55+.



OF THOSE WHO DO CARE IF A DEVICE OR APP USES AI...

Why care?

The number one reason for caring is that consumers expect brands to be open and transparent (35%).

Following this is a desire to understand potential risks (27%) and concerns about AI accuracy and reliability (17%).

Why not care?

For those who don't care, the dominant reasons are believing AI use is inevitable (32%), only caring whether the product works properly (26%) or viewing all AI as positive progress (28%).



OF THOSE WHO DO CARE IF A DEVICE OR APP USES AI... WOULD YOU TRUST AI MORE KNOWING HUMANS WERE IN THE DEVELOPMENT LOOP?

BRAZIL



8 - Neither/Nor
11 - No not really
4 - No not at all

CANADA



16 - Neither/Nor
10 - No not really
8 - No not at all

FRANCE



8 - Neither/Nor
14 - No not really
10 - No not at all

GERMANY



12 - Neither/Nor
8 - No not really
0 - No not at all

GHANA



6 - Neither/Nor
7 - No not really
1 - No not at all

INDIA



4 - Neither/Nor
1 - No not really
0 - No not at all

INDONESIA



8 - Neither/Nor
8 - No not really
2 - No not at all

JAPAN



21 - Neither/Nor
5 - No not really
1 - No not at all

KENYA



4 - Neither/Nor
5 - No not really
0 - No not at all

NIGERIA



6 - Neither/Nor
4 - No not really
0 - No not at all

SOUTH AFRICA



7 - Neither/Nor
3 - No not really
0 - No not at all

SOUTH KOREA



16 - Neither/Nor
9 - No not really
1 - No not at all

UK



8 - Neither/Nor
13 - No not really
8 - No not at all

USA



10 - Neither/Nor
8 - No not really
4 - No not at all

It depends who you ask

Fewer responses of "definitely" in Japan and South Korea suggest a cautious optimism, contrasted with the strong confidence in emerging markets including Kenya and India. Organizations can build trust by localizing AI transparency strategies by region. In more hesitant, developed markets, this means investing in explaining how AI decisions are made, while in emerging markets, reinforcing human involvement is especially important.

Regulated industries: a question of trust

73% of global consumers (most of them confident English speakers) feel particularly uncomfortable with AI translation and localization in at least one regulated industry, such as finance, legal or life sciences.

Despite growing take-up among business users¹⁴, many business leaders share concerns about implementing generative AI at scale, including the absence of standards, unresolved legal questions, unpredictable performance and the risks of bias and misrepresentation arising from low-quality training data¹⁵.

Director, Un-Young CHOI of Lee International IP & Law, expands on the need in regulated industries for responsible AI that's precise, accurate and secure:

"The adoption of Generative AI has markedly improved work efficiency across numerous industries. However, given the sensitive nature of the intellectual property (IP) field, security remains our top priority. For this reason, we prioritize using secure B2B Generative AI solutions.

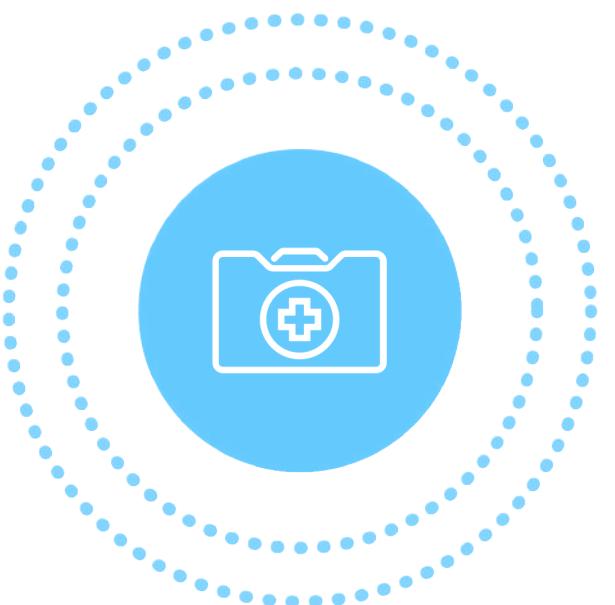
While these systems may lack some features offered by external open-source platforms, they excel in delivering exceptional quality within specialized domains. Furthermore, as these tools continue to evolve, we anticipate that next-generation B2B generative AI will significantly boost both the quality and productivity of our work."

Lee International
IP & LAW

Let's explore the three pillars of AI trust in more detail.

14 - [Growing Up: Navigating Generative AI's Early Years](#)

15 - [Why invest in AI ethics and governance?](#)



50%

of UK respondents are uncomfortable with the use of AI localization in healthcare - as are 47% of South African respondents



PILLAR ONE

TRANSPARENCY

For consumers who care how AI is used, clear labelling of AI-generated content and chatbots is the entry-level expectation for organizations. 81% of respondents say this is at least quite important, and over 60% in markets like India, Indonesia, Kenya, Nigeria and South Africa consider it very important.

Labelling AI-generated content isn't just a box-ticking exercise - it builds trust in both the content itself and the brands producing it. Consumers value transparency not only because it shows openness, but because it helps them assess potential risks when engaging with AI tools. Many remain sceptical of AI's accuracy and reliability, further underscoring the need for clear, visible labelling.

For **Thomas Labarthe, President, Content Technologies, RWS**, transparency and AI content labelling is an essential starting point or a minimum requirement to support content confidence.

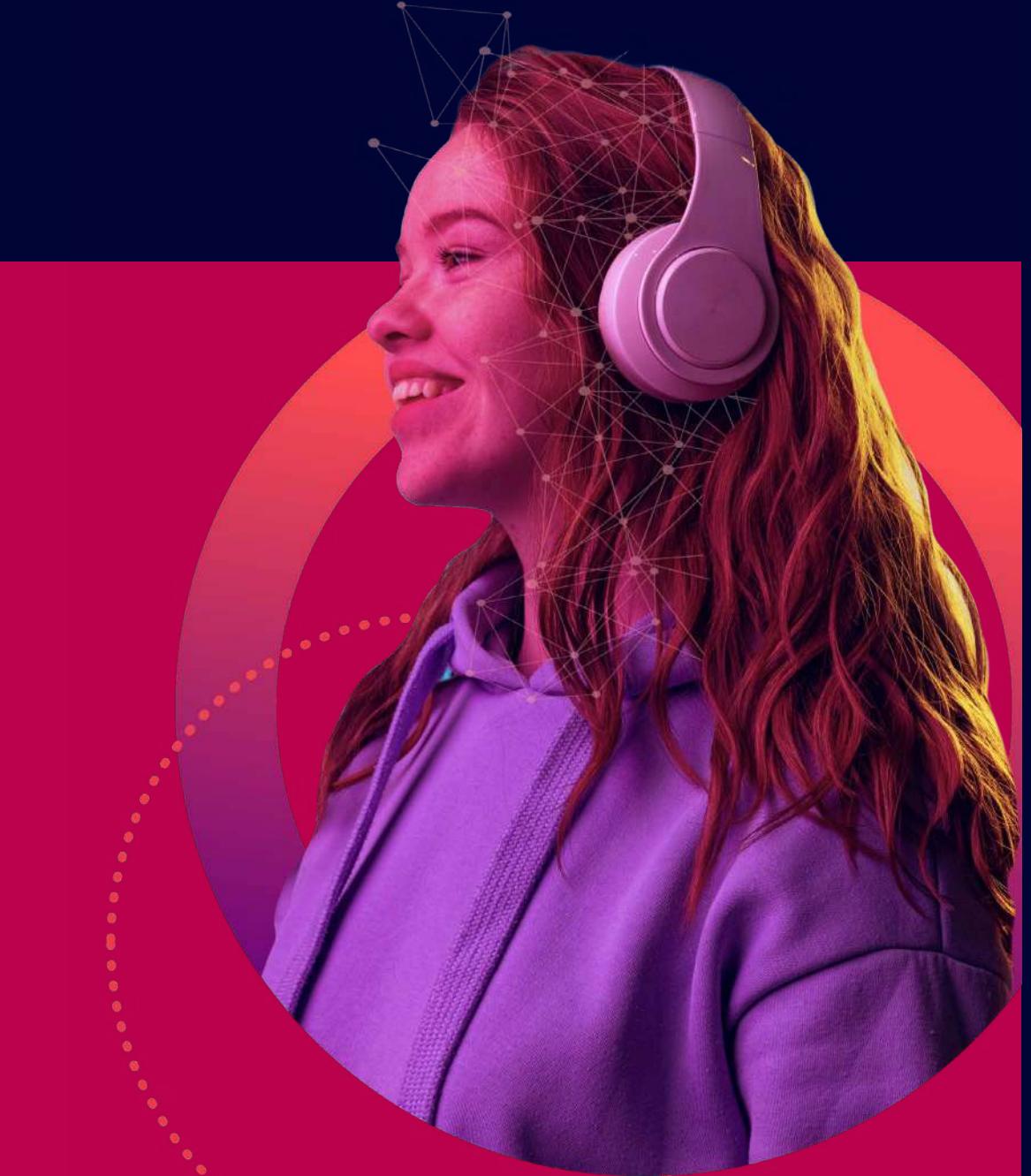
Take our AI image test

The challenge of identifying AI content adds urgency. If consumers can't tell whether content is AI-generated, their trust is at risk. Despite this, many organizations focus on hypothetical risks like Artificial General Intelligence (AGI) or even Artificial Superintelligence (ASI) rather than addressing the practical issues consumers care about today.

These findings should be an urgent call to action. Consumers want to see immediate standards introduced to protect the integrity of information ecosystems. Labelling, clear communication and proactive action must become the norm, not the exception.


62%

of global respondents say the clear labelling of AI content and chatbots would positively impact their trust in a brand



ACTION

Businesses should implement clear labelling for AI-generated content and provide links to details about risks, training data and policies, using data protection practices as a model for transparency.

PILLAR TWO

EXPLAINABILITY

Transparency flows naturally into explainability, another pillar critical to trust. 83% of global respondents say that if an AI could explain its reasoning or decisions, their trust would increase. Among GenAI pioneers, this rises to 91%, highlighting the expectations of those most engaged with generative AI outputs.

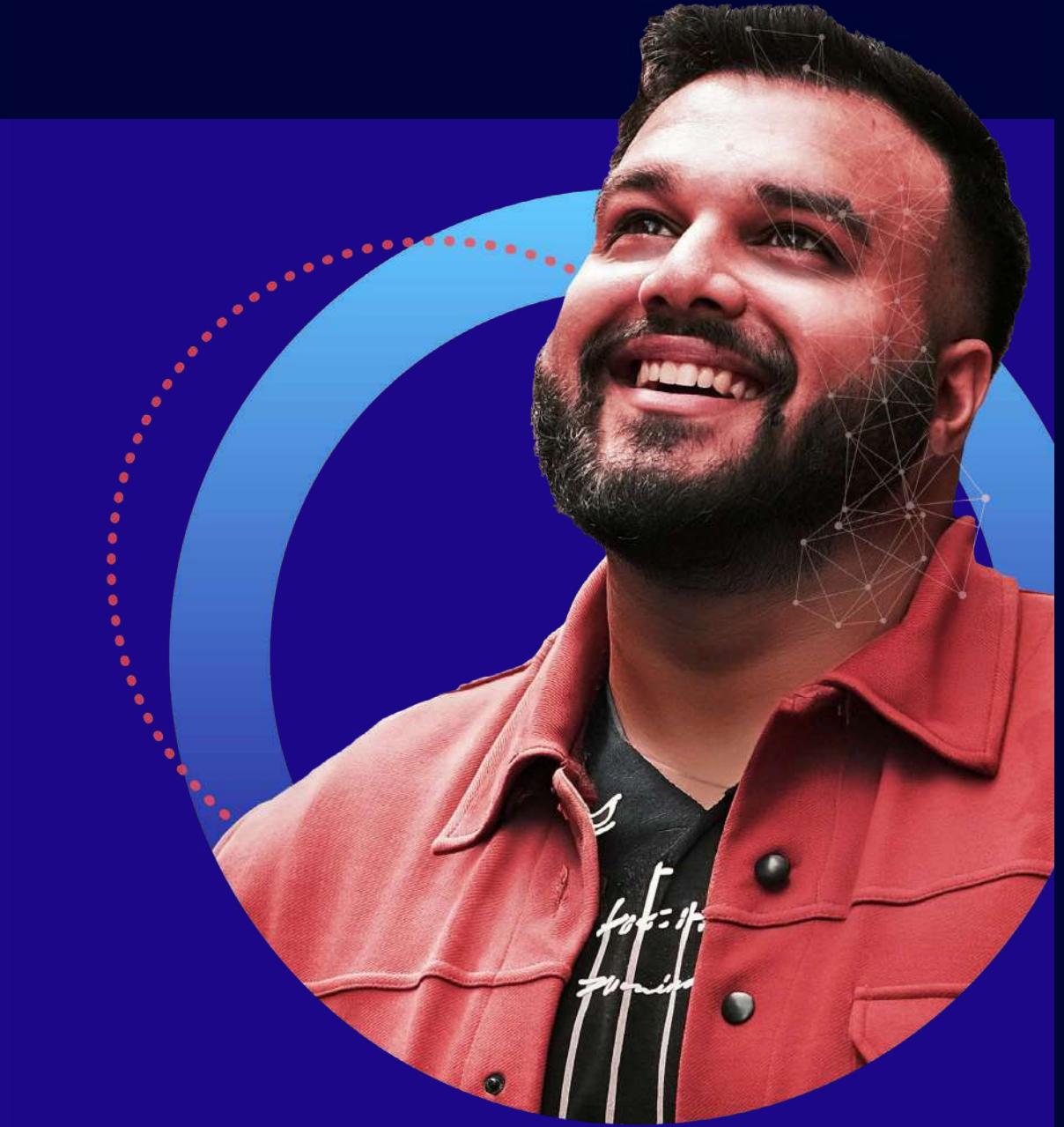
Explainability is a challenge due to the complexity of neural networks. But it's vital for the maturation and acceptance of AI¹⁶ and, as **Thomas Labarthe** notes, is still a novel and experimental technology.

Enterprise organizations also face explainability challenges. McKinsey research¹⁷ reveals over 90% of businesses are concerned about their ability to implement AI responsibly, and 40% cite a lack of explainability as a key obstacle. Addressing this need will be critical to improving trust and driving adoption.

Businesses have a range of explainability tools at their disposal - from revealing training data to linking users to the source material behind AI outputs. Practical steps like providing guidance on validating responses, issuing warnings about sensitive data, or setting clearer expectations, can enhance user understanding. In an ironic twist, it may be large language models (LLMs) themselves that lead the way in explaining AI decisions to users¹⁸.

63%

of Indian respondents
say improved explainability
would increase their trust
in AI outputs a great deal



ACTION

Businesses should explore multiple levels of explainability, offering accessible explanations, visual guides and multimedia content to reach users of all technical abilities.

¹⁶ - Building AI trust: The key role of explainability

¹⁷ - Building AI trust: The key role of explainability

¹⁸ - Enabling AI to explain its predictions in plain language

PILLAR THREE

HUMAN INVOLVEMENT

Consumers place a high value on human involvement in AI development, with 80% of respondents saying it would increase their trust in the system. This is especially important in regulated sectors, where accuracy, precision and reliability are critical.

People are still sceptical about fully autonomous AI. But when AI is vital to achieving ambitious goals – such as delivering digital healthcare to remote communities – then the assurance of direct human involvement and monitoring in AI is essential in establishing trust.

In tandem with building trust, this **Genuine Intelligence™¹⁹** approach also brings significant commercial benefits, as explained by **Matthew David, Head of Localization at Kingfisher**:

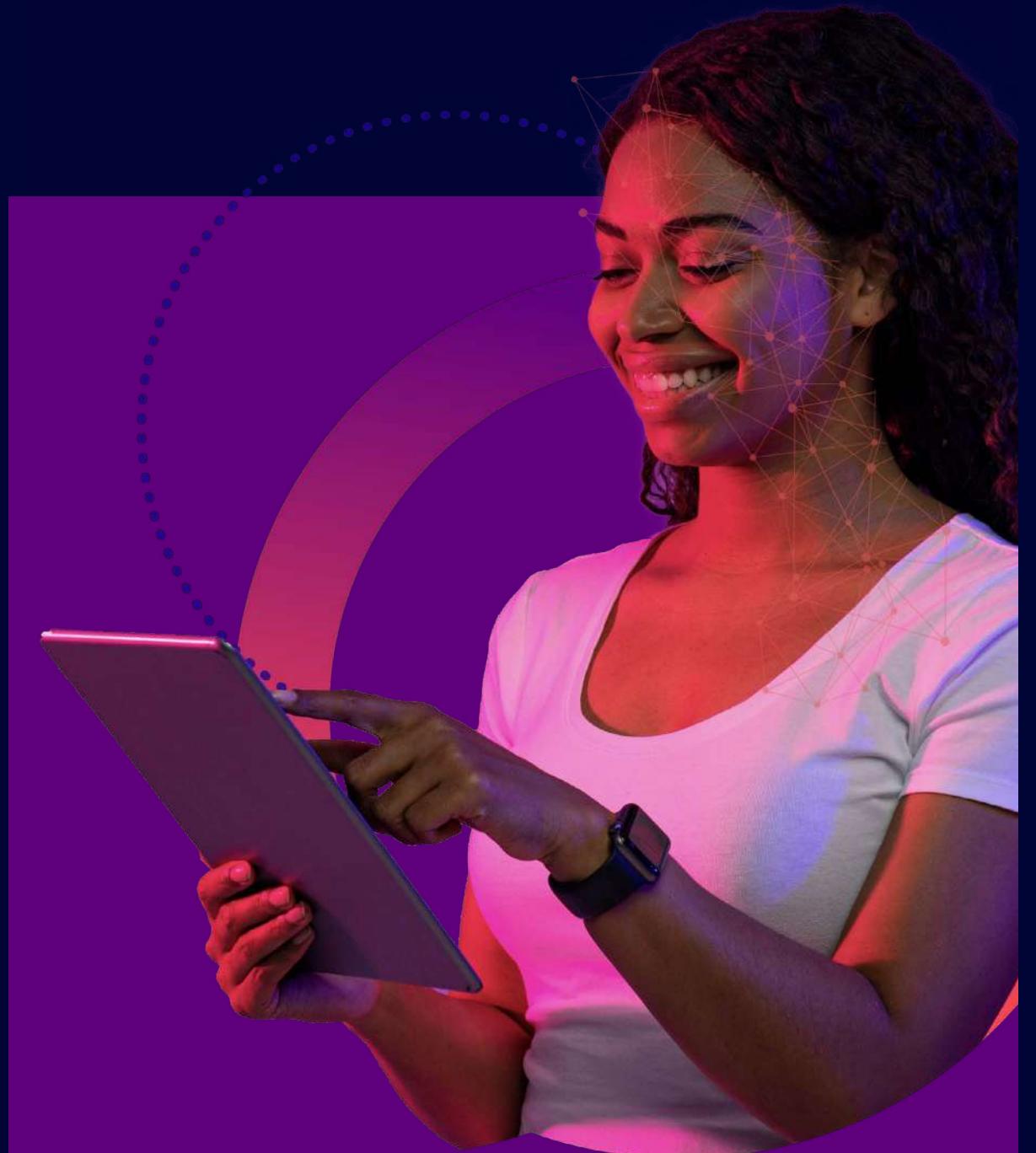
"In partnership with our linguistic experts, our use of AI is helping us to reduce cost, drive efficiency and reduce time to market through our localized content for our banner brands".

Kingfisher



How the human-in-the-loop model develops through the current wave of hype surrounding agentic AI²⁰ is something to watch. While these systems promise productivity gains, they raise new risks, including reliability and adaptability across cultures. Even leading voices like Google Deep Mind²¹ and IBM²² have flagged the challenges surrounding these technologies, making human oversight essential.

When it comes to localization, the stakes are especially high. As **Thomas Labarthe** highlights, language is our most powerful tool for understanding, but if we get it wrong, the consequences can be enormous. For this reason, for the foreseeable future, human involvement in localization is here to stay.



ACTION

Businesses should understand the risks as well as the opportunities surrounding autonomous AI, integrating human expertise into new processes to earn trust, mitigate risks and optimize performance.

19 - RWS Genuine Intelligence

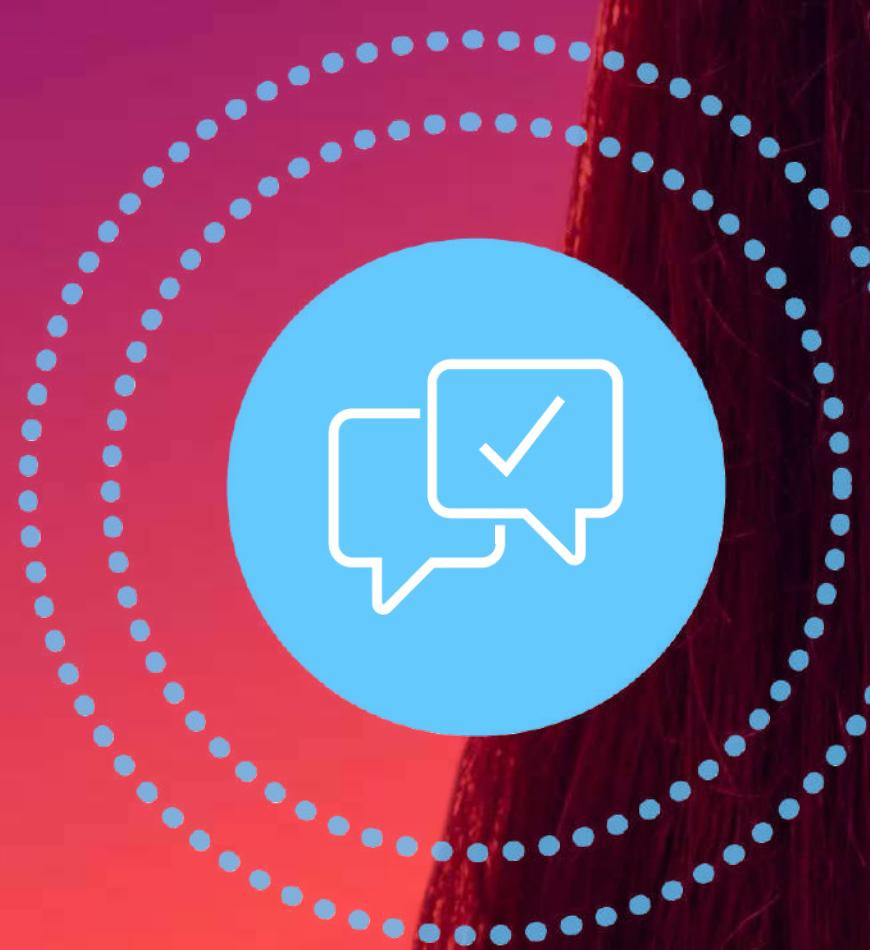
20 - What Is Agentic AI?

21 - The ethics of advanced AI assistants

22 - New ethics risks courtesy of AI agents?

THREE

FROM DEFICIT TO DIVIDEND



Cost-motivated AI implementations are falling short of consumer expectations. The three pillars of AI trust give organizations a road map to improve. While these are essential requirements, sustained trust will only be earned by delivering high-quality, inclusive AI applications that offer an open AI value exchange with cultural breadth and depth.

False economies

In today's challenging economic climate, many organizations have prioritized replacing rather than augmenting human roles with AI. A recent survey found that 84% of business leaders see "AI as useful for cutting employees"²³.

While cost-cutting is part of AI's appeal, **Maria Schnell, Chief Language Officer at RWS**, points out the hidden costs:



RWS

"Data infrastructure is one thing, but the costs of maintaining models to sustain performance are another. There's a strong link between investment and the control businesses have over LLM outputs."

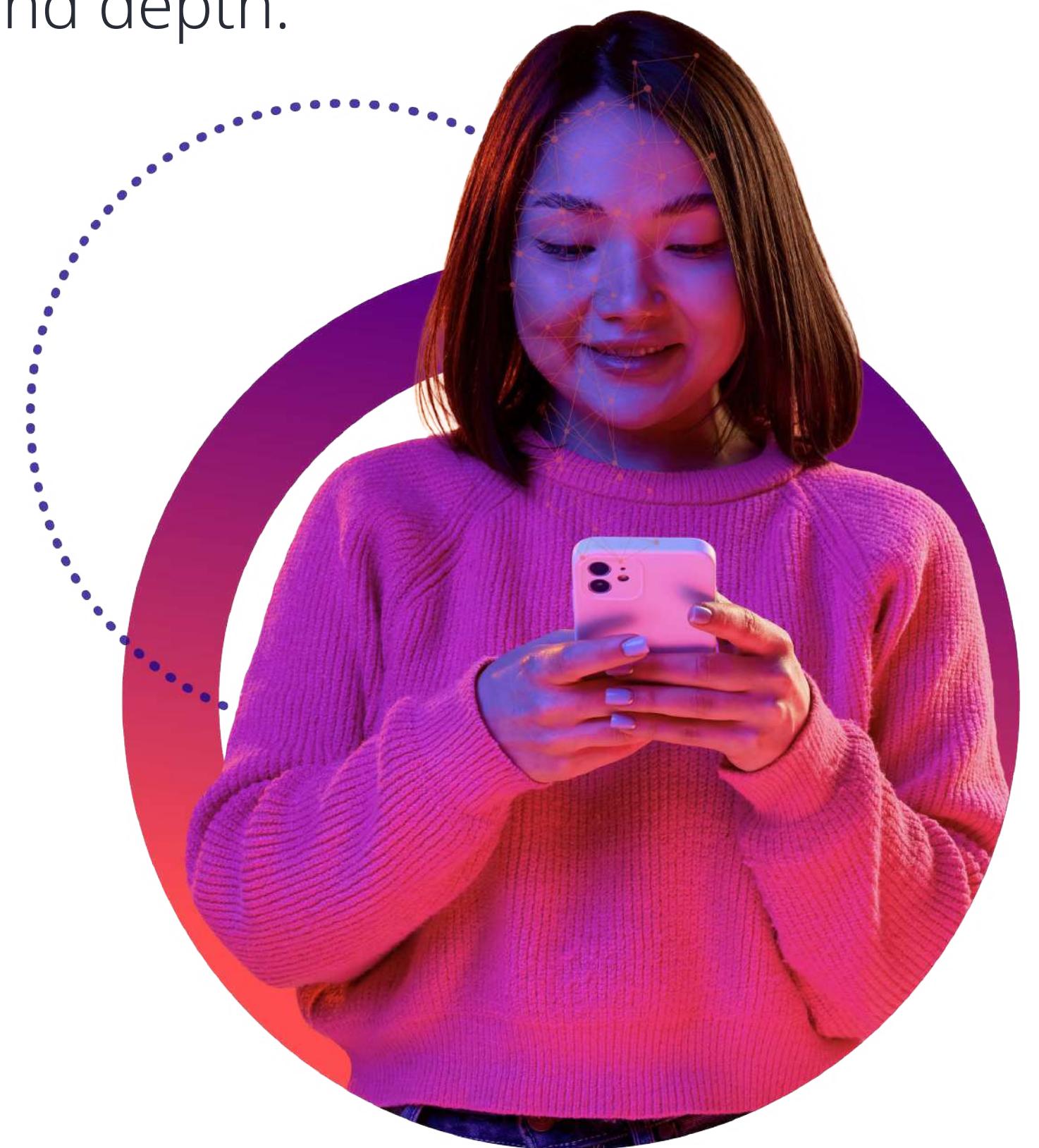
This control will be key to meeting consumer expectations and earning their trust. The global public is engaged with AI, they know what's possible and they want to see new measures of quality implemented by brands and businesses.

²³ - Avanade Trendlines: AI Value Report 2025

The three pillars: obstacles or opportunities?

Some organizations may view the three pillars – **transparency, explainability and human involvement** – as constraints. However, responsible businesses see them as opportunities to lead in a space where AI remains an immature technology. Early missteps risk alienating consumers, but proactive investment in trust-building offers long-term rewards.

For regulated industries like finance, healthcare and legal, these pillars aren't optional – they're essential. Trust-building measures will protect users and reduce risks, while opening the door to innovation in precision medicine, financial products and beyond.



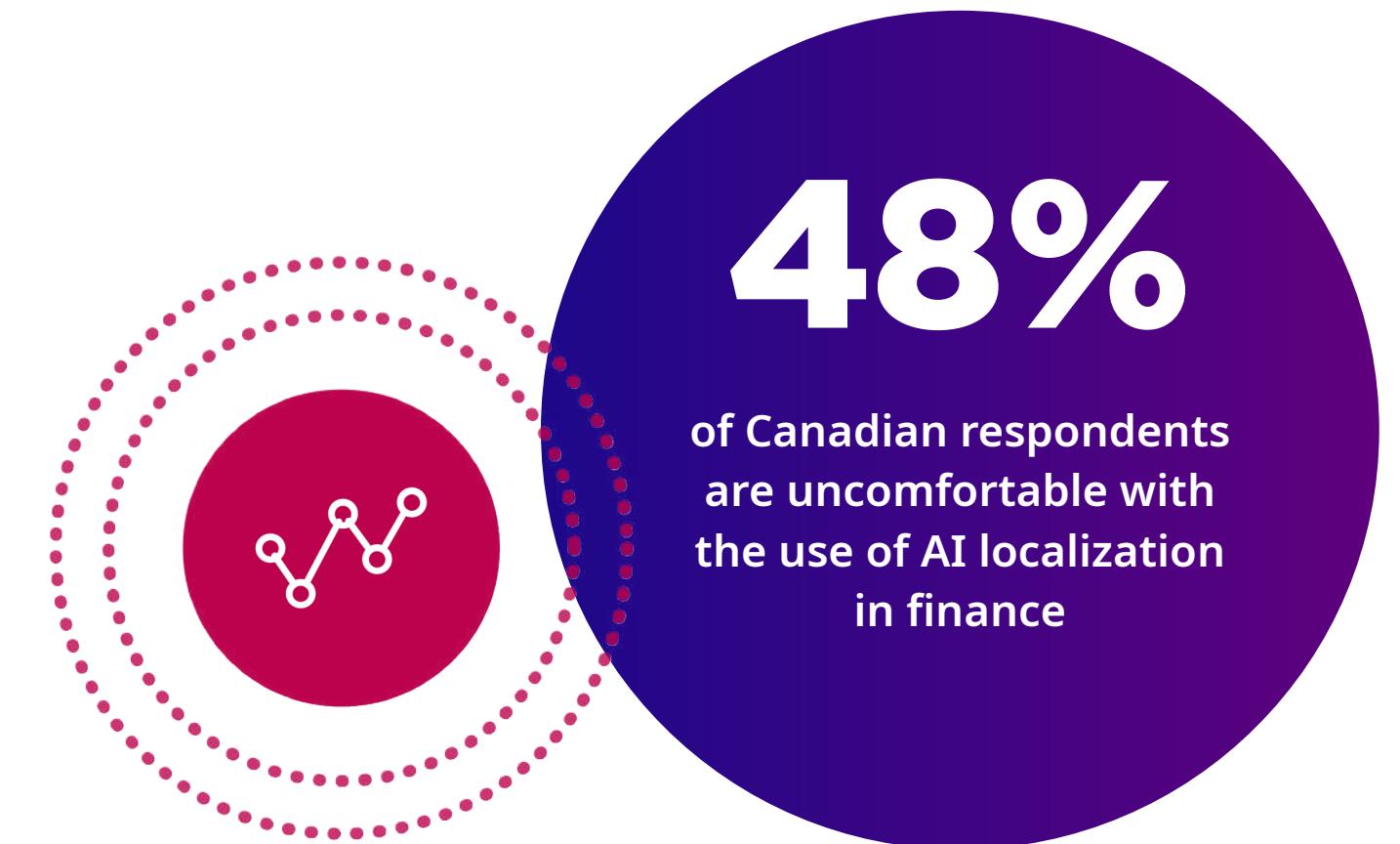
Regulated industries: high stakes

Regulated industries are regulated for good reason. Misdiagnoses, incorrect prescriptions, financial defaults and patent errors can have devastating consequences. This is why industry leaders remain risk-averse, prioritizing precision and accuracy above all else.

Still, with careful oversight, these industries can also unlock enormous benefits. Think earlier diagnoses,

faster drug discovery and personalized medicine. The pace of development is astonishing – DeepMind, for instance, announced that its first AI-discovered drugs will enter trials by the end of 2025²⁴.

By embracing transparency, explainability and human-in-the-loop processes, businesses in these sectors can build trust and drive transformative outcomes.



²⁴ - AI-developed drug will be in trials by year-end, says Google's Hassabis.

HOW COMFORTABLE WOULD YOU FEEL WITH YOUR DATA BEING USED TO TRAIN AI? (%)

Quality expected

Around 70% of consumers have already been exposed to generative AI content, with a similar number experimenting with generative AI tools themselves.

These consumers – particularly GenAI pioneers – are forming new standards of quality. They know how easy it is to generate content using AI and increasingly see over-reliance on AI as a sign of laziness from brands²⁵.

For businesses, this means adopting AI cannot be about shortcuts. It must enhance quality, creativity and personalization to meet rising consumer expectations.

The AI value exchange

Consumers understand the implicit AI value exchange – their data helps improve AI performance. A majority are broadly comfortable with their non-personal data being used for training models. Encouragingly, 17% of consumers recognize that data sharing improves community representation, especially through better local language models²⁶.

This is particularly promising for businesses committed to inclusive AI development, where culturally diverse data can help fill critical gaps.



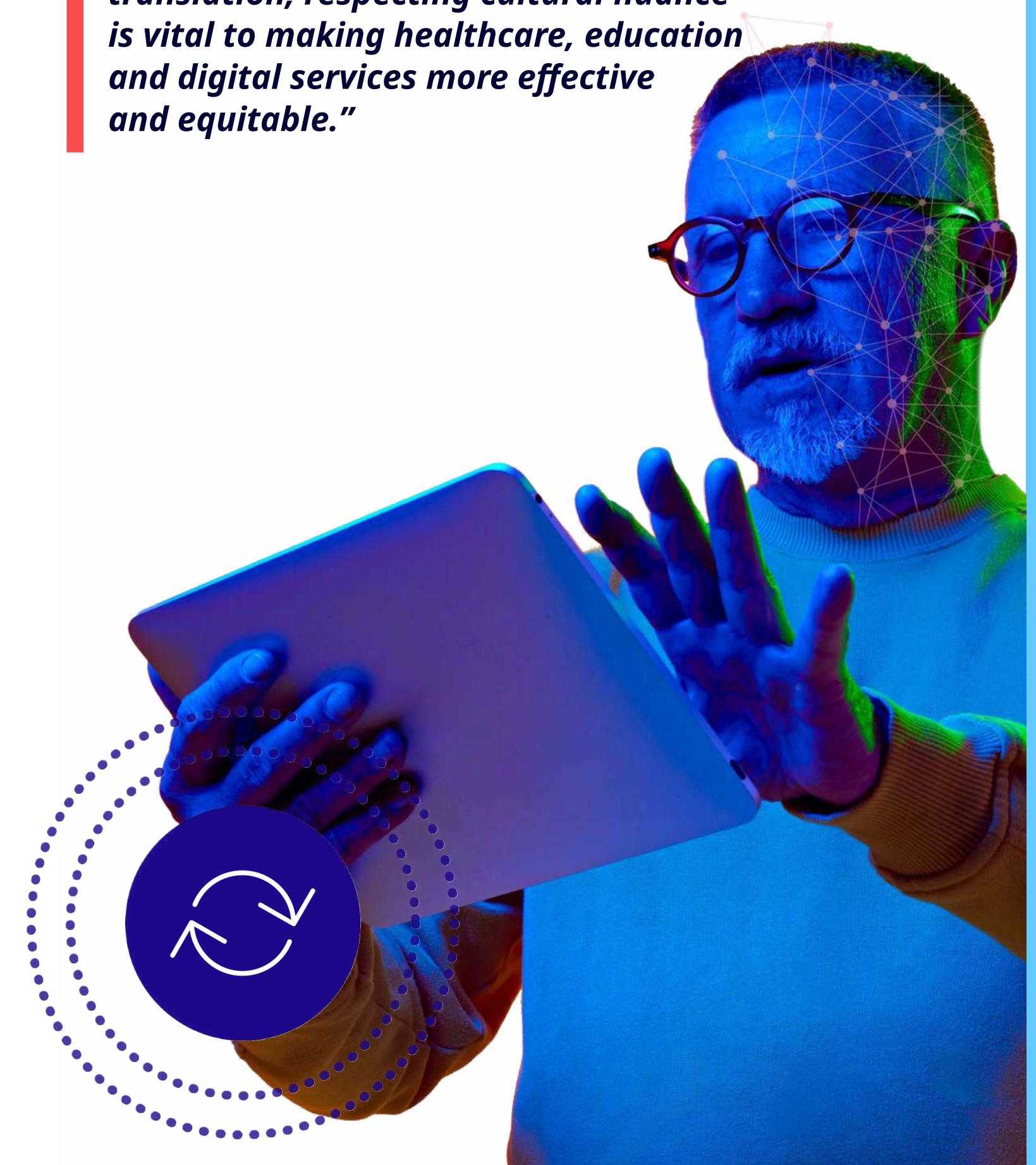
25 - Bynder's 'Human Touch' survey uncovers consumers opinions on the use of AI in content creation

26 - Jacaranda launches open source LLM in five African languages

FROM DEFICIT
TO DIVIDEND

TAKEAWAY

AI stakeholders should focus on growing user trust in AI tools. The three pillars of AI provide a robust foundation for trust-building, but sustaining trust means investing in quality and inclusiveness. Consumers expect AI to enhance performance, not just cut costs, and businesses must meet these expectations to reap the rewards of growing AI adoption.



Inclusive data

Such data sharing will be crucial to future success. Today, a shortage of quality data (including text and voice) for local dialects and languages is a significant barrier to generative AI development.

Aimee Ansari, CEO, Clear Global, explains:



CLEAR
Global

"Ethical considerations are crucial when developing language data in low-resource languages. LLMs can easily reinforce cultural biases, racism and bigotry, particularly when there's limited data. Adequately testing the models – or carefully curating the data – is critical to ensure that content doesn't create harm."

Ethically sourced text datasets, such as Common Corpus²⁷, are supporting open-source model development. Other initiatives, including Mozilla's Common Voice programme²⁸ and the TWB Voice initiative²⁹, seek to ethically source voice data, while a race gathers pace to develop native language models across African markets, from Nigeria to South Africa³⁰.

Meta has been in the vanguard of linguistic inclusion through their *No Language Left Behind* programme, announcing a 200 language model³¹ and releasing another with capabilities in 100 languages³².

Riedwaan Bassadian, Principal Data and AI Specialist, Microsoft South Africa, highlights the importance of inclusive language coverage in delivering public services:



Microsoft

"Seamless translation – especially for government services – means dignified accessibility for all. Beyond mere translation, respecting cultural nuance is vital to making healthcare, education and digital services more effective and equitable."

27 - Harvard AI Training

28 - How this grassroots effort could make AI voices more diverse

29 - Digital and language inclusion can transform lives — here's how

30 - From Swahili to Zulu, African techies develop AI language tools

31 - 200 languages within a single AI model

32 - Metas new AI model can translate speech from more than 100 languages



FOUR

BEYOND WORDS

To truly connect with human audiences, AI must extend beyond the written word. Images, video, voice, gesture and expression are all integral parts of human communication. To earn trust across channels, cultures and even emerging metaverse markets, AI needs to deliver multi-modal and multimedia sophistication. **Genuine Intelligence™** is the way to do it.

The CX challenge

Despite global brands prioritizing customer experience (CX), scores have flatlined in recent years, reaching record lows in the USA³³. This decline is hurting business reputations and brand scores, suggesting a major disconnect in how CX and customer satisfaction are approached³⁴.

AI can help to rebuild CX by automating translations, chatbots and knowledge management systems to reduce manual work and speed up internal processes. However, the real opportunity lies in reimagining the digital experience with generative AI – enhancing marketing, customer support, innovation and operations at scale. Agentic AI will be critical to delivering these solutions with speed and efficiency.

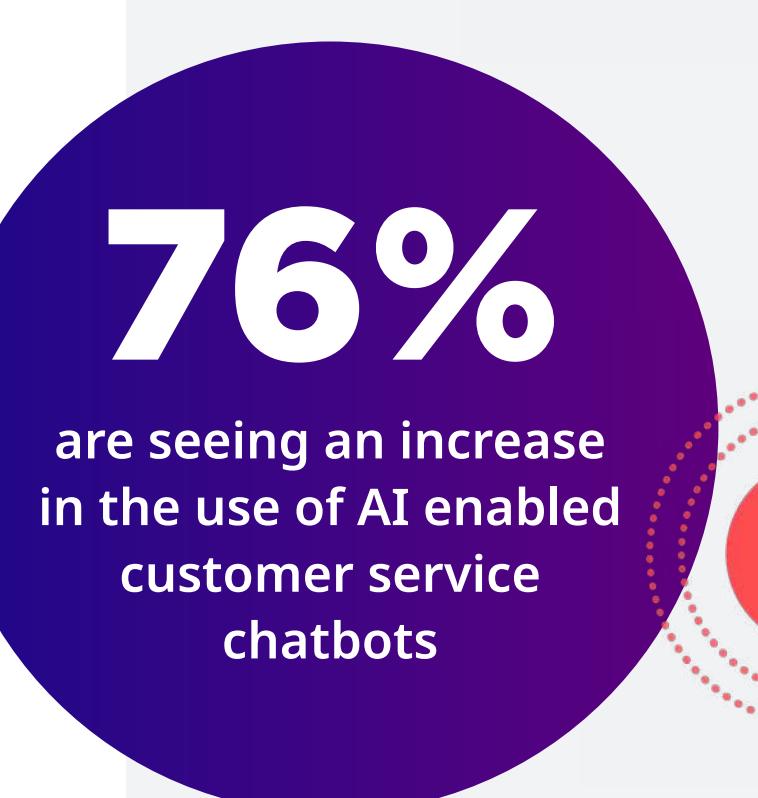
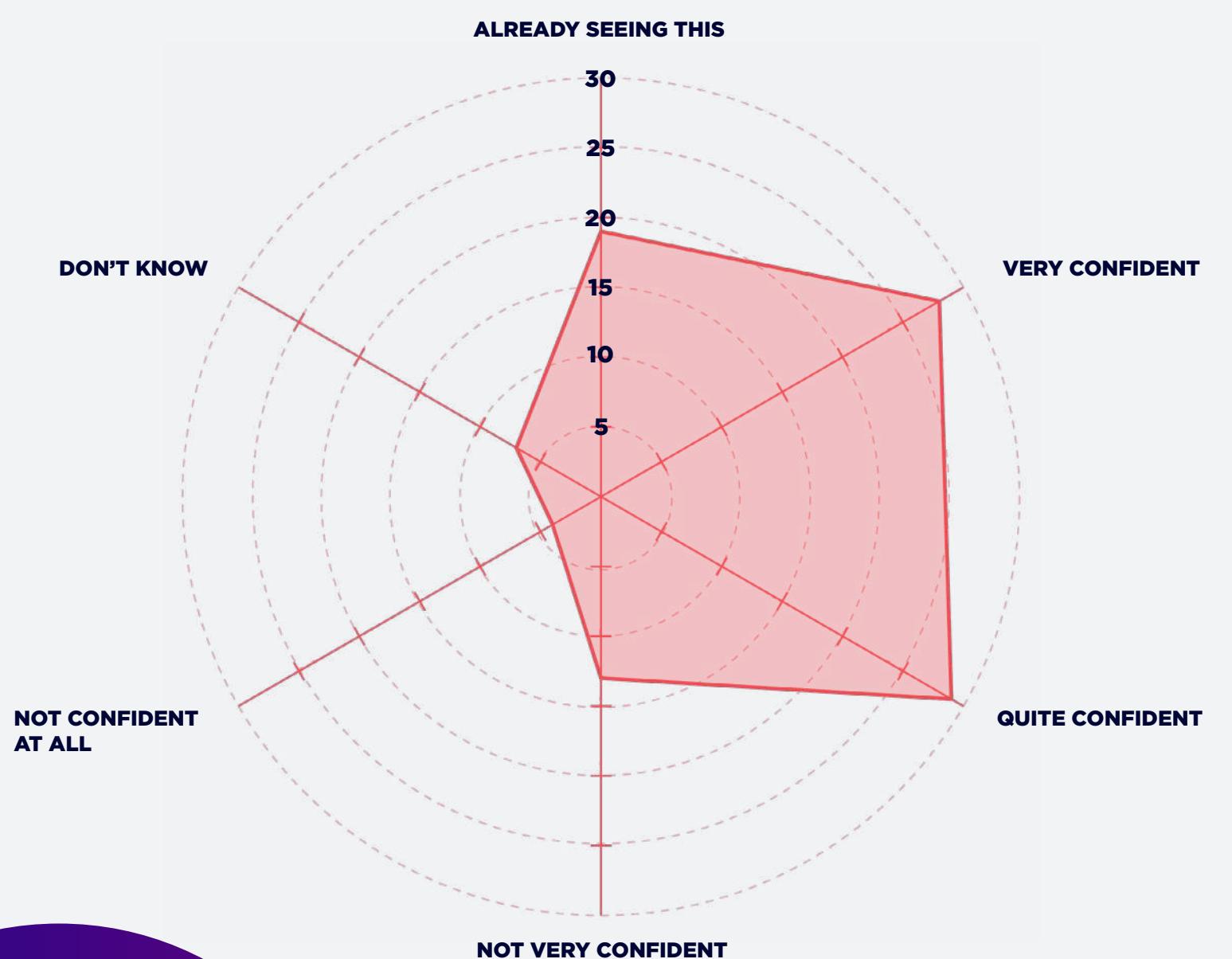
At its heart, the CX challenge is about personalization. While the data economy promised personalized experiences, delivery has often been underwhelming – lacking nuance, subtlety and true consumer connection.

Personalization. Finally?

Consumers are increasingly optimistic about AI's potential for personalization. Our survey reveals 57% of respondents believe AI will deliver genuine personalization and 19% say they are already experiencing it.

AI's power lies in its ability to recognize patterns at scale. Where past personalization efforts struggled with disparate systems, unstructured data and inconsistent customer identification, today's AI can overcome these barriers. Businesses now have the tools to deliver highly personal, high-impact content and propositions at unprecedented speed.

CONFIDENCE THAT AI WILL LEAD TO BETTER PERSONALIZATION (%)

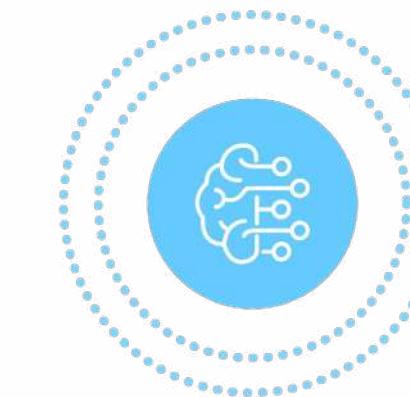


A feast for the senses

Personalized content must extend across all media formats – text, images, video and voice – while maintaining cultural authenticity and adapting to context. This ensures seamless customer journeys that resonate with customers, wherever they are in the world.

Consumers are already experimenting with multimedia AI tools. 45% are using voice technologies, 51% social media filters and 38% image editing tools, while 36% are interested in AR/VR (just under half of these describing themselves as active).

This not only creates opportunities for brand engagement, but also increases demand for real-time dubbing, subtitling and translation to create localized content across diverse media formats and markets.



WHERE ARE SERVICES OR APPS USED NOW? (%)



Cultural connections

Communicating across cultures presents real challenges. While hard to define, people immediately sense when something feels inauthentic. Inclusive cultural representation is a complex tapestry involving multiple threads – with language at its heart.

Tim Lyon, Director, Global Shared Services Customer Support at AGCO, explains:



AGCO

"We're dedicated to enhancing farmers' success through exceptional customer experiences. As a company doing business all over the world, AGCO believes it's important to deliver translated content in all the markets we serve. AI has become a fundamental requirement to do this at a high quality, at scale and economically."

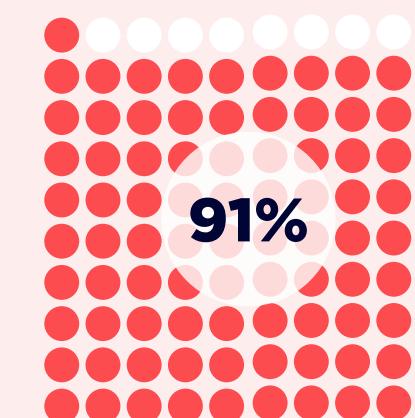
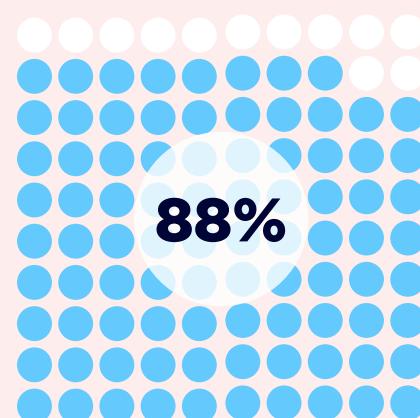
To connect authentically, brands should work with experts to go beyond translation and embrace cultural nuance. This includes tone of voice, imagery, colour palettes and even the timing and packaging of communications. However, 48% of global consumers still believe AI-based localization negatively impacts their trust in brands compared to human-led efforts.

The solution lies in combining human and machine capabilities. Language specialists should work alongside AI systems to ensure performance is continuously monitored, optimized and quality assured at speed and scale. This is the essence of **Genuine Intelligence™** – a purposeful integration of human and AI strengths to enhance efficiency, quality, safety and connection.

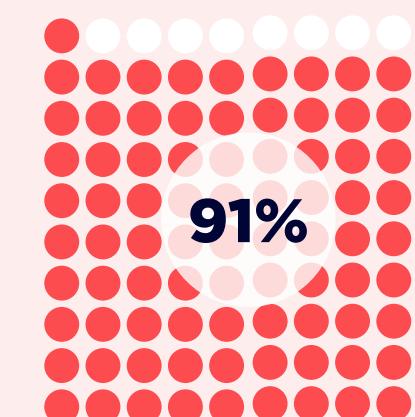
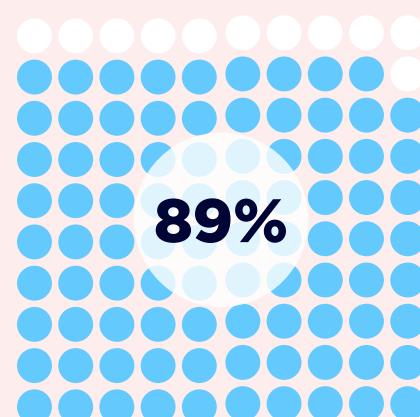
CULTURAL INCLUSION

% AGREEMENT THAT EACH ATTRIBUTE IS IMPORTANT

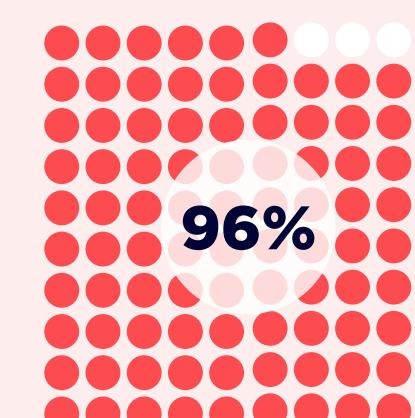
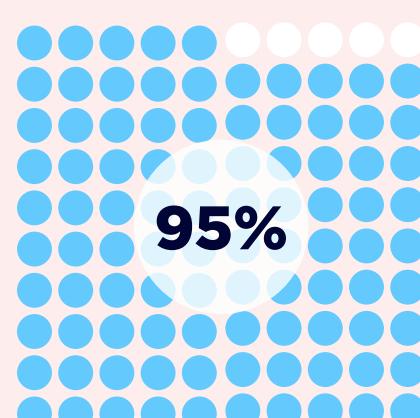
● 2022 ● 2024



GLOBAL BRANDS SHOULD SHOW THEIR CULTURAL UNDERSTANDING



CUSTOMERS SHOULD BE ABLE TO DEAL WITH ONLINE COMPANIES IN THEIR OWN LANGUAGE



AUTOMATIC REAL-TIME TRANSLATION SHOULD BE A STANDARD ONLINE SERVICE



TAKEAWAY

Consumers are cultural creatures. Businesses should use AI-driven personalization to deliver tailored, authentic CX experiences, with human expertise to elevate these cultural connections. This fusion of AI and human insight is the key to standing out in a crowded market.

FIVE

NATIVE IS THE NEW NORMAL



Breaking language barriers is essential for global customer experience. In today's interconnected world, brands can't succeed in new markets without fully translating and localizing their content and communications.

Cultural renaissance. Digital expression.

Our data shows that 95% of global respondents now expect automatic real-time translation as a standard service – a significant rise from previous surveys. Consumers also increasingly expect to communicate in their own language and see brands demonstrating cultural insight in their interactions.

This all points to a broader renaissance of cultural identity across global markets. Once dominated by Western (often US-led) ideals, emerging markets are reclaiming their cultural identity and language with a new confidence. Younger generations are rediscovering their heritage, remixing it across digital channels and seeing it resonate in global markets.

The UNCTAD Creative Economy Outlook 2024³⁵ highlights the rapid growth of creative industries in emerging markets, reflecting this cultural resurgence. Similarly, our research reveals a notable rise in global consumers expressing pride in their national culture, history and identity – up from 72% in 2022 to 79% in 2024. Brands, take note.

Bridging digital divides

AI pioneers are already active in emerging markets, developing tools for local languages and dialects. However, as **Ben Middleton, Principal Architect, RWS**, acknowledges, there are many challenges to overcome around accessibility, affordability, energy, infrastructure and literacy if young emerging market players are to seize their opportunity to leapfrog forward with GenAI³⁶.

Global technology companies are playing their part in assisting skills development in emerging markets with Microsoft, for example, supporting small, medium and micro-businesses across Africa³⁷.

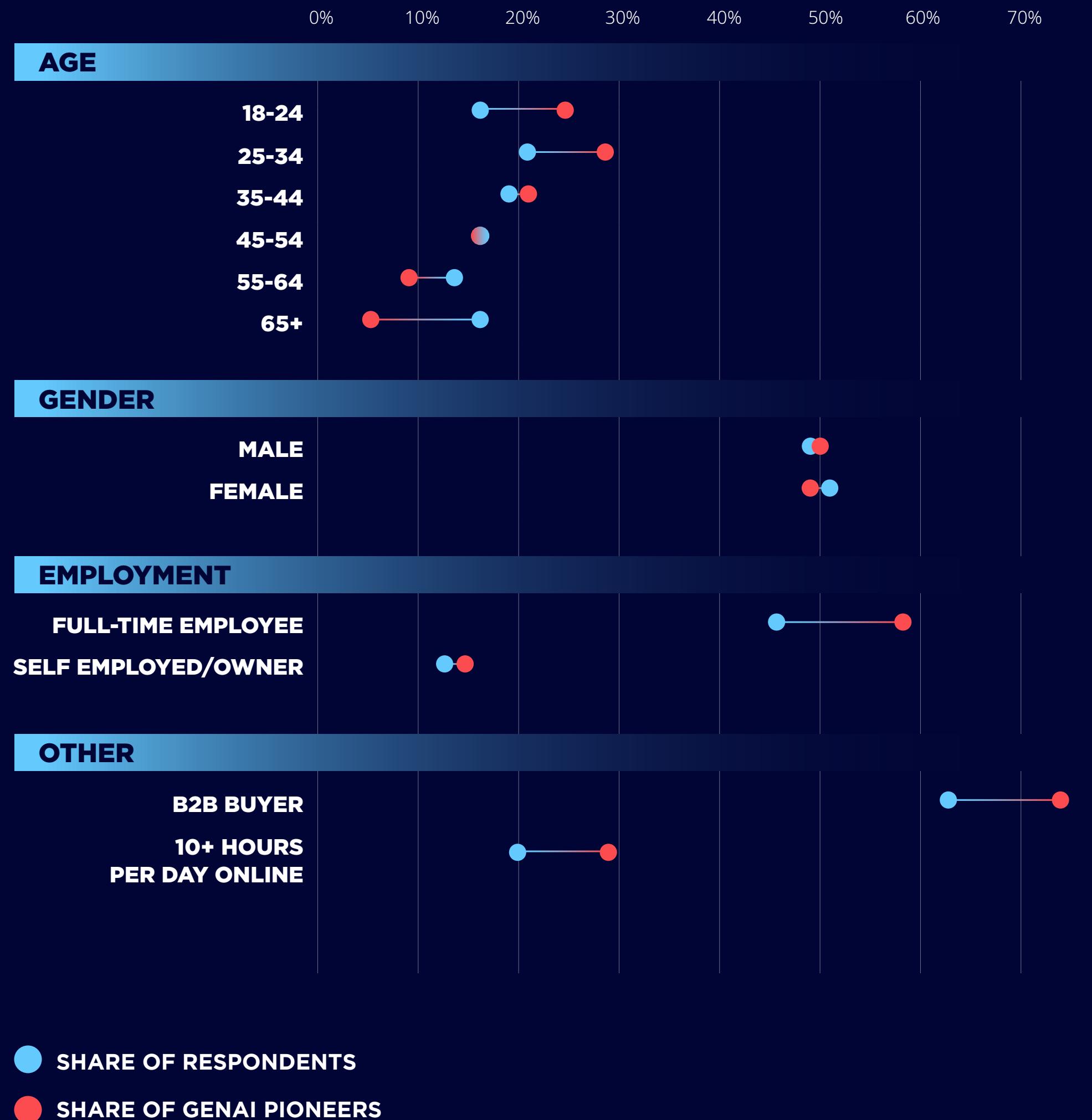


³⁵ -Creative Economy Outlook 2024

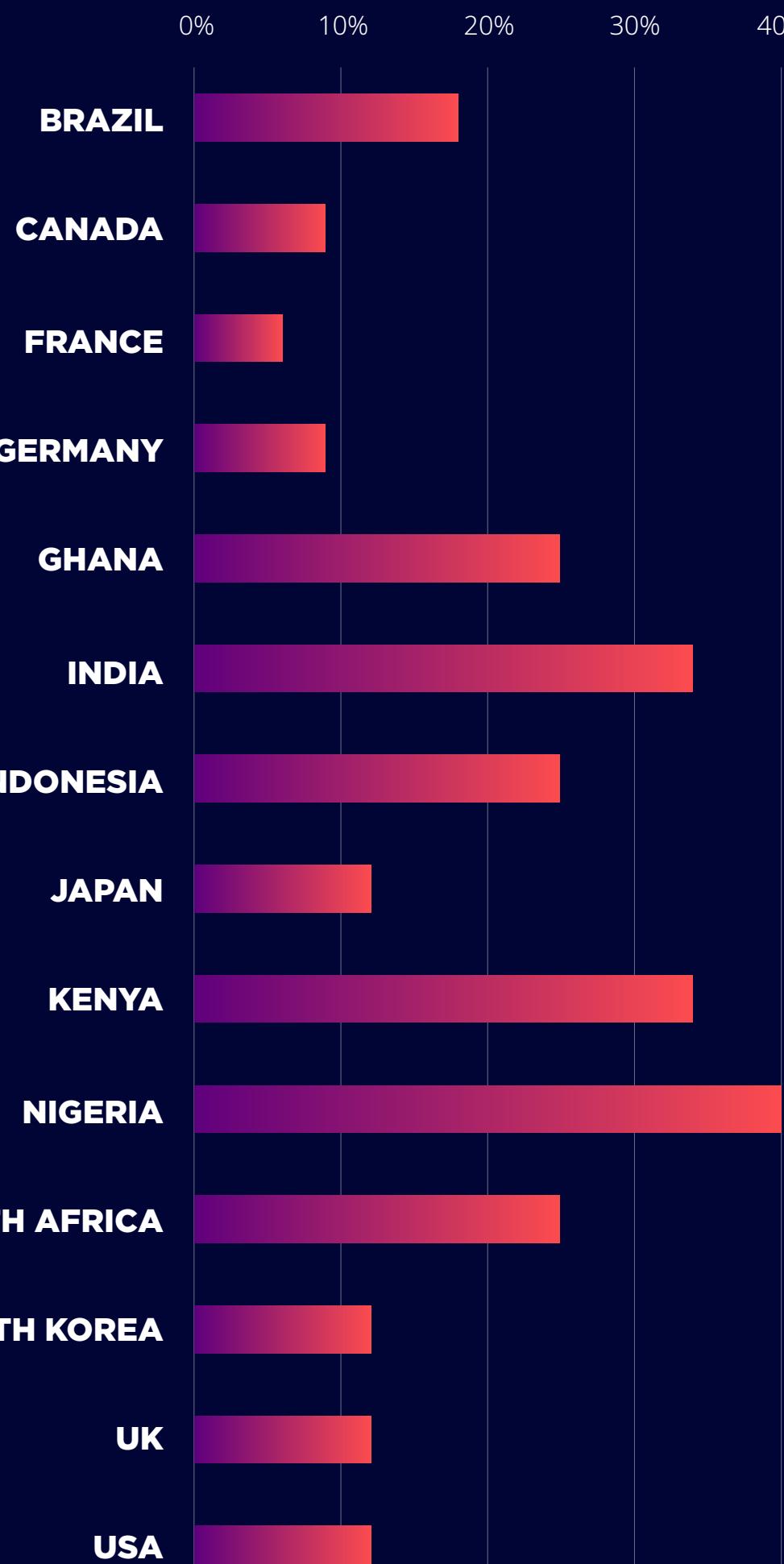
³⁶ -Can AI unlock Africa's youth demographic opportunities?

³⁷ -Microsoft Launches AI Initiative to Empower African Startups

GENAI PIONEERS BY DEMOGRAPHICS



GENAI PIONEERS BY MARKET



AI's early adopters are emerging

Overall, 19% of survey respondents are GenAI pioneers – a high figure for such a new technology. Emerging markets such as Nigeria, Kenya and India are driving this surge in early adoption, showing above average shares of GenAI pioneers. In contrast, GenAI pioneers make up a below average proportion of developed markets such as Canada, France, Germany and USA.

Localization and consumer protection

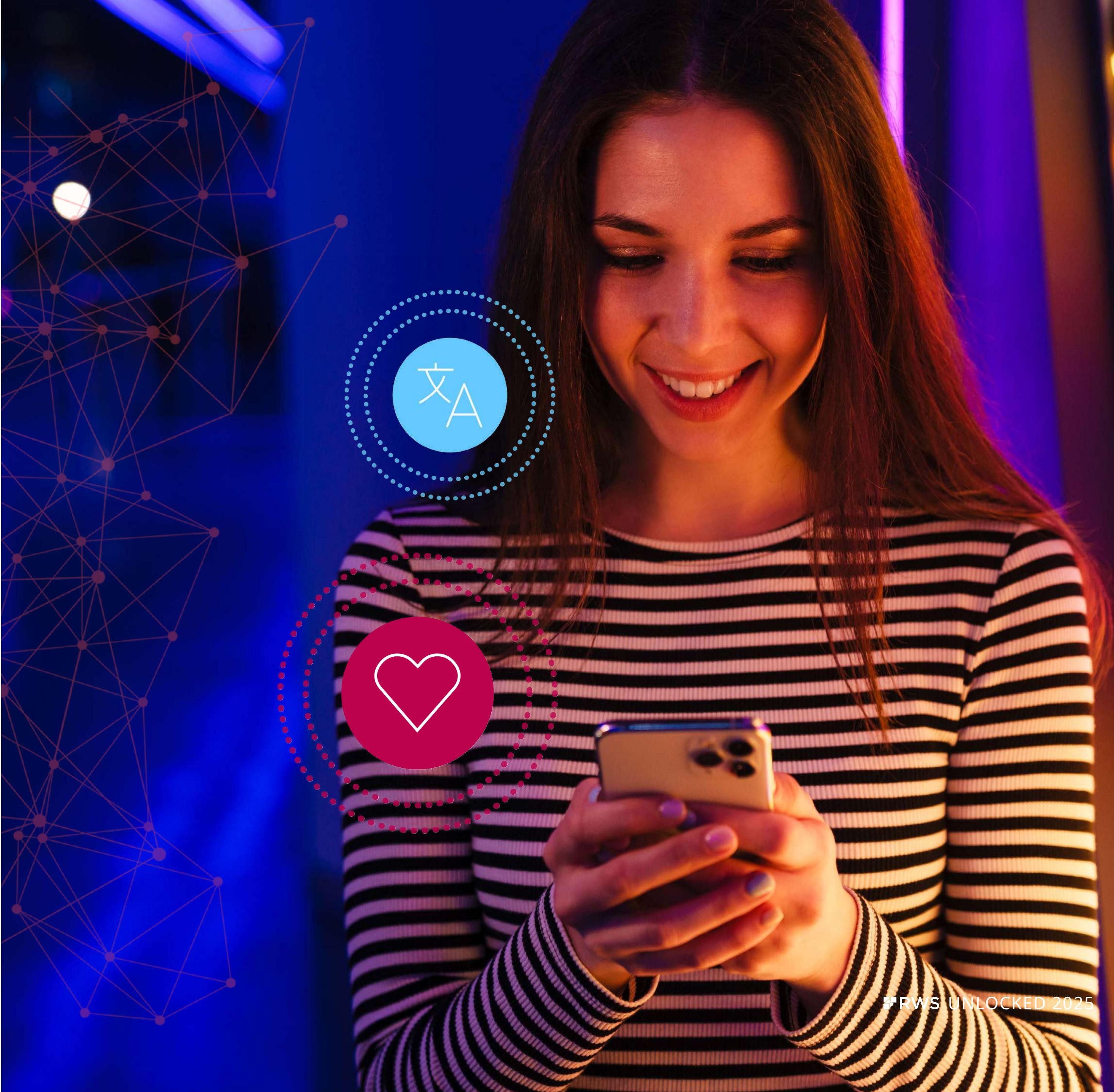
Localization plays a key role in safeguarding both consumers and brands. With 56% of global respondents reporting a rise in fake or fraudulent content from brands over the past two years (rising to 68% in India and 66% in South Africa), investment in high-quality translation and localization is a critical line of defence.

Effective localization not only helps consumers identify authentic content, but also makes it harder for bad actors to replicate at scale.

Catch up or lose out

74% of consumers believe in-market brands better understand their needs and priorities. Nearly 40% say in-market brands have better insight into their lives than global competitors.

This local advantage stems from proximity to the consumer. However, global brands can level the playing field by embedding localization and cultural insight into their personalization strategies. Wrapping personalized messaging with a credible cultural context elevates impact and deepens consumer engagement.



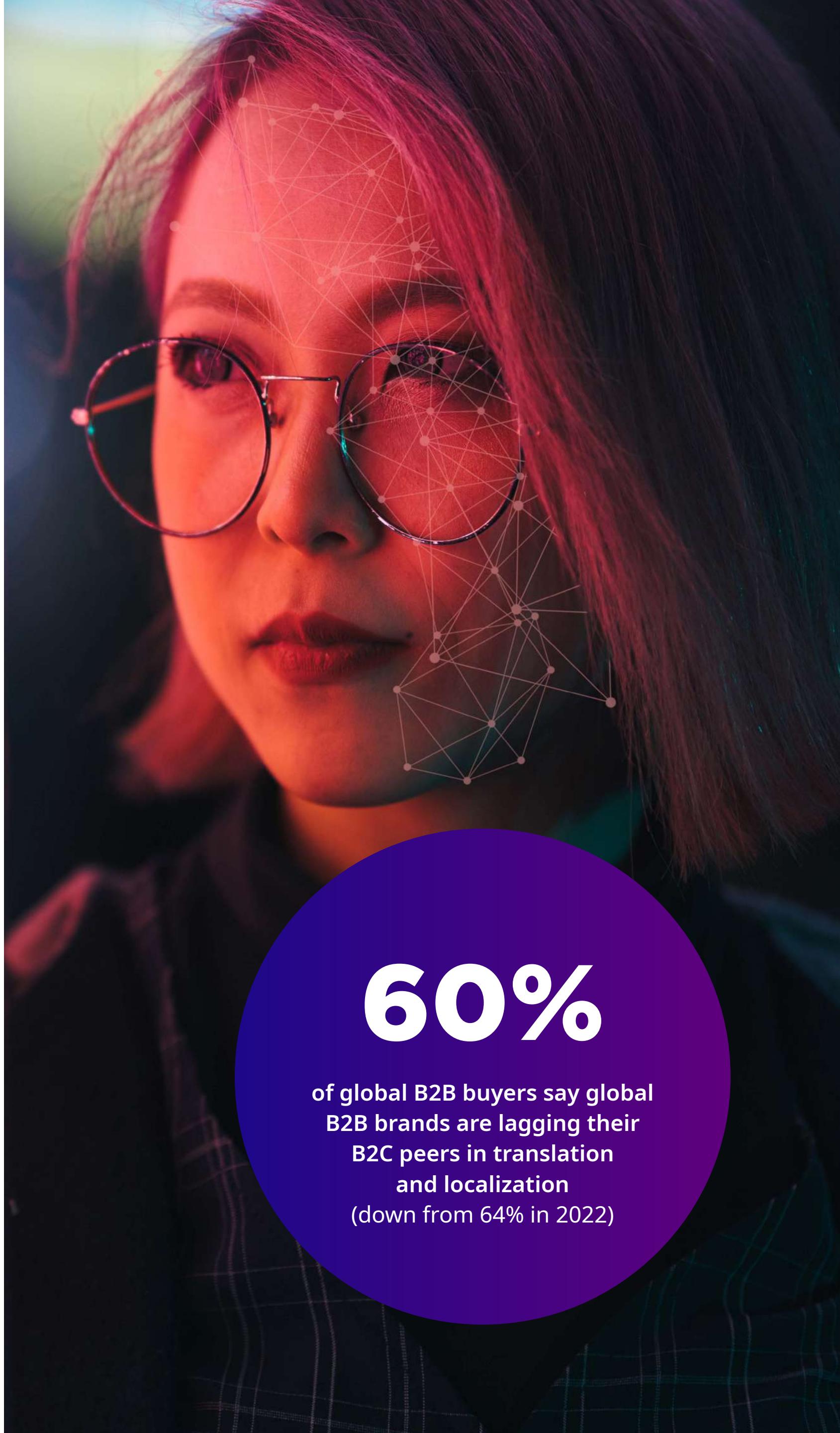
AI localization: an opportunity for B2B

While global B2B brands lag behind their B2C counterparts in translation and localization, there's a growing willingness among B2B buyers to engage with AI-powered solutions.

Globally, 37% of our survey respondents are involved in B2B purchase decisions, rising to 65% in India and Nigeria, but dropping to 15% in Japan and 20% in France. These regional variations reflect employment structures and age demographics – for instance, only 3% of French respondents are self-employed or business owners, compared to 27% in Nigeria.

Of these B2B buyers globally, 60% say they would be more willing to engage with a B2B brand using AI for translation and localization – rising to over 90% in India.

For B2B brands, there's a clear opportunity here to meet customer expectations for better localization through AI. By leveraging the capabilities of **Genuine Intelligence™**, global B2B brands can deliver localized, high-quality communications and experiences that resonate with buyers and build trust.



TAKEAWAY

Translation and localization are non-negotiable requirements for global brands. They provide important protections for consumers while reflecting a new and confident milieu as young people remix culture and tradition across digital channels. Quality machine translation is now available at speed, meeting the needs of underserved B2B buyers, but global brands should recognise that they are playing catch up with in-market players and need to blend language localization and personalization to compete effectively.

A close-up portrait of a woman with dark skin and short hair, smiling broadly. Her face is partially overlaid by a network of red dots connected by lines, suggesting a digital or interconnected theme.

LOOKING AHEAD

For organizations looking to deliver content that resonates at the scale and speed required in today's digital ecosystem, the reality is clear: it takes the best of human and machine intelligence.

After two years of a dizzying shockwave of generative AI hype and excitement, brands and businesses are striving to unlock its potential, mitigate its risks and close the gaps in its performance³⁸.

Our research reveals a striking truth: consumers know more about generative AI than businesses expect³⁹. In fact, recent data shows global consumers spent around one billion dollars on AI apps in 2024, a figure set to rise as the market matures⁴⁰.

Meeting these evolving expectations will require brands to embrace innovations in multimedia spaces - from the metaverse to advanced dubbing and subtitling - which will drive the next wave of real-time localization.

Reflecting the richness of cultures

"We're approaching a tipping point where the majority of cultural production will be delivered by machines", says **Thomas Labarthe**. This shift underscores a critical

responsibility to ensure machine-generated outputs are as rich and diverse as the cultures they reflect.

New tools must prioritize accessibility and inclusion, creating meaningful human connections that respect the dynamism of language and culture. Keeping pace with evolving community trends and behaviours will be essential to ensuring AI outputs remain authentic and relevant.

Winning the battle for trust

Transparency, explainability and human involvement are no longer optional – they're urgent imperatives. Consumers are calling for clearer communication and a stronger human role in AI's development. If Edelman's assertion holds true that we live in a "crisis of grievance", where distrust dominates, one misstep in AI implementation could cause lasting damage to brand reputation.



Yet the opportunity is vast. Brands can reimagine the end-to-end digital experience - leveraging AI-powered personalization and content technology to deliver value at scale. Agentic AI holds the promise of unprecedented utility and personalization, but trust will depend on robust governance and alignment with brand values.

Preserving the human connection

In the race to innovate, we must not lose sight of what makes us human. People are multi-sensory, emotional and complex. AI should be a tool for connection, not a crutch for automation⁴¹.

This is why human expertise and experience remain critical to long-term success. **Genuine Intelligence™**, the purposeful integration of human and AI capabilities, will differentiate brands, build trust and ensure quality content resonates with audiences for years to come.

³⁸ TMT Predictions 2025

³⁹ Consumers Know More About AI Than Business Leaders Think

⁴⁰ AI apps saw over \$1 billion in consumer spending in 2024

⁴¹ botsgonewild



RWS Holdings plc is a unique, world-leading provider of technology-enabled language, content and intellectual property services. Through content transformation and multilingual data analysis, our combination of AI-enabled technology and human expertise helps our clients to grow by ensuring they are understood anywhere, in any language.

Our purpose is unlocking global understanding. By combining cultural understanding, client understanding and technical understanding, our services and technology assist our clients to acquire and retain customers, deliver engaging user experiences, maintain compliance and gain actionable insights into their data and content.

Over the past 20 years we've been evolving our own AI solutions as well as helping clients to explore, build and use multilingual AI applications. With 45+ AI-related patents and more than 100 peer-reviewed papers, we have the experience and expertise to support clients on their AI journey.

We work with over 80% of the world's top 100 brands, more than three-quarters of Fortune's 20 'Most Admired Companies' and almost all of the top pharmaceutical companies, investment banks, law firms and patent filers. Our client base spans Europe, Asia Pacific, Africa and North and South America. Our 60+ global locations across five continents service clients in the automotive, chemical, financial, legal, medical, pharmaceutical, technology and telecommunications sectors.

Founded in 1958, RWS is headquartered in the UK and publicly listed on AIM, the London Stock Exchange regulated market (RWS.L).

For further information, please visit: www.rws.com