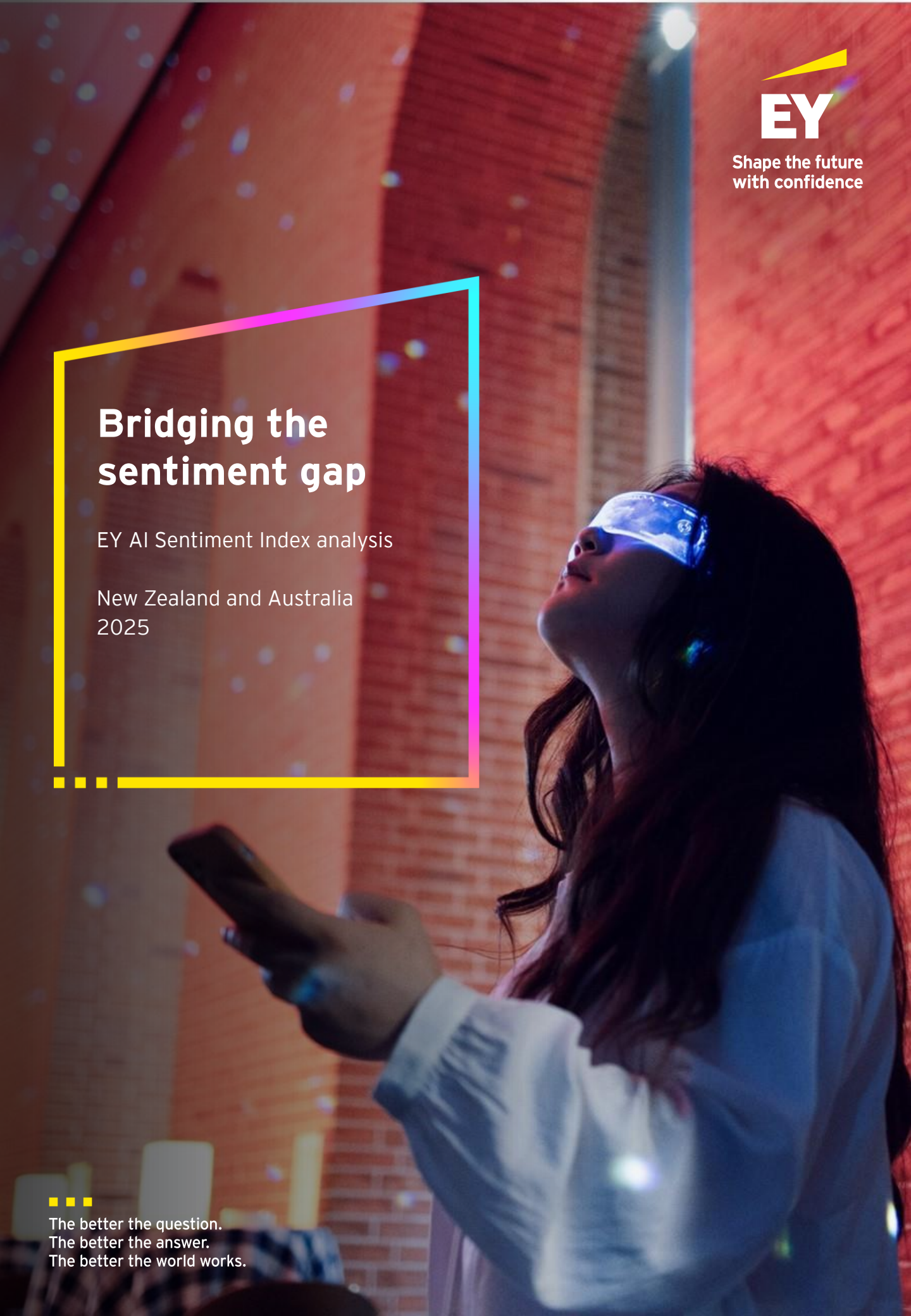


Shape the future with confidence

Bridging the sentiment gap

EY AI Sentiment Index analysis

New Zealand and Australia
2025

The better the question.
The better the answer.
The better the world works.

Introducing the New Zealand and Australia AI sentiment analysis

In a disrupted world shaped by rapid advancements in technology, EY is firmly focussed on embracing the power of AI to drive greater collaboration and innovative solutions for our clients, our people and stakeholders.

As EY, we also have an important role building trust and confidence in artificial intelligence (AI), as we shape the future with confidence in this critical area.

Uptake at scale is crucial, and our 2025 EY AI Sentiment Report for New Zealand and Australia uncovers a nuanced landscape of AI perceptions.

Building upon the success of our Australian AI Sentiment report in 2024, we've now expanded its scope to include New Zealand. We also compare New Zealand and Australia to other regions, producing insights about the substantial sentiment gap towards AI, particularly among vulnerable and at-risk segments of our communities. Despite these concerns, many New Zealanders and Australians recognise AI's immense potential to positively impact people's lives.

By fostering understanding and igniting discussion, we're focussed on building the trust needed to develop leading-class AI solutions that benefit everyone.

David Larocca

EY CEO & Regional Managing Partner, Oceania

Presenting New Zealanders and Australians views on AI

Following the success of the Australian AI Sentiment research conducted in 2024, EY is proud to present this follow-up analysis, which expands its scope to include New Zealand and a variety of other global markets. This report serves as a vital resource in understanding the evolving landscape of artificial intelligence, and its reception among everyday New Zealanders and Australians.

As AI technology continues to proliferate, its impact on societies worldwide cannot be overstated. However, there is a substantial gap in sentiment towards this transformational technology that poses a risk for individuals in both New Zealand and Australia.

There are deep-seated concerns regarding potential negative impacts of AI, particularly on vulnerable and at-risk segments of our communities. This apprehension must be addressed so that the benefits of AI are equitably distributed and that no one is left behind in this technological revolution.

Despite these concerns, it is heartening to note that many New Zealanders and Australians also recognise the immense potential of AI to fundamentally transform lives for the better.

This report highlights the opportunities that AI presents, serving as a starting point to build engagement within the broader community. By fostering understanding and dialogue, we can cultivate the social license necessary to drive the development of world-class AI solutions that benefit all.

As we navigate this complex landscape, it is imperative that we remain vigilant and proactive in addressing the challenges posed by AI, while simultaneously embracing its potential to enhance our societies.

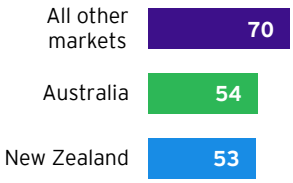
Together, we can harness the power of AI to create a brighter, more inclusive future for all.

Katherine Boiciuc

EY Regional Chief Technology and Innovation Officer, Oceania

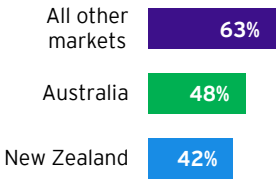
Top ten facts to know about AI sentiment in New Zealand and Australia

National AI sentiment index (avg out of 100)



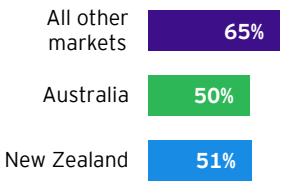
People are significantly **less positive** towards AI than in other parts of the world, especially Asia.

Optimism about AI in customer experience



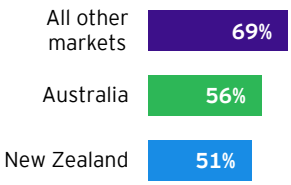
Over **2 in 5** people like the idea of using AI in their day-to-day life to help simplify and make choices.

AI in the workplace



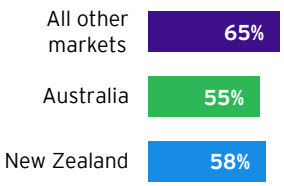
Half like the idea of their employers using AI to automate routine tasks in the workplace.

Augmenting the human workforce



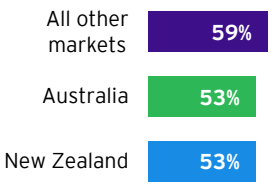
Many people believe AI makes it **easier** to do tasks that usually require technical or academic training.

Embedding AI into transport



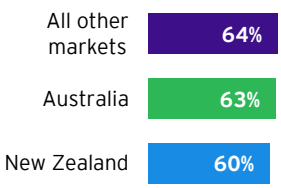
People are comfortable with AI being used to **monitor** vehicle usage and recommend maintenance.

Enhancing security



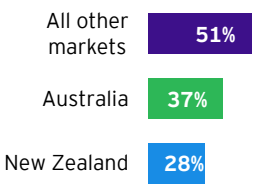
Half like the idea of AI being used to monitor in-store activities to reduce anti-social behaviours.

Protection against fraud



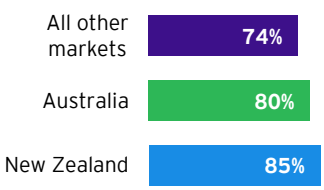
Around **3 in 5** people want to see AI used more to help protect them against risks, such as fraud.

Believe the benefits outweigh the negatives



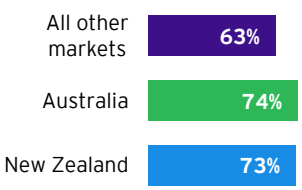
Across both countries, people still aren't convinced that the benefits of AI are worth the **risks**.

Fear of false or misleading content



Many people are deeply concerned about **false** information being generated by AI and being taken seriously.

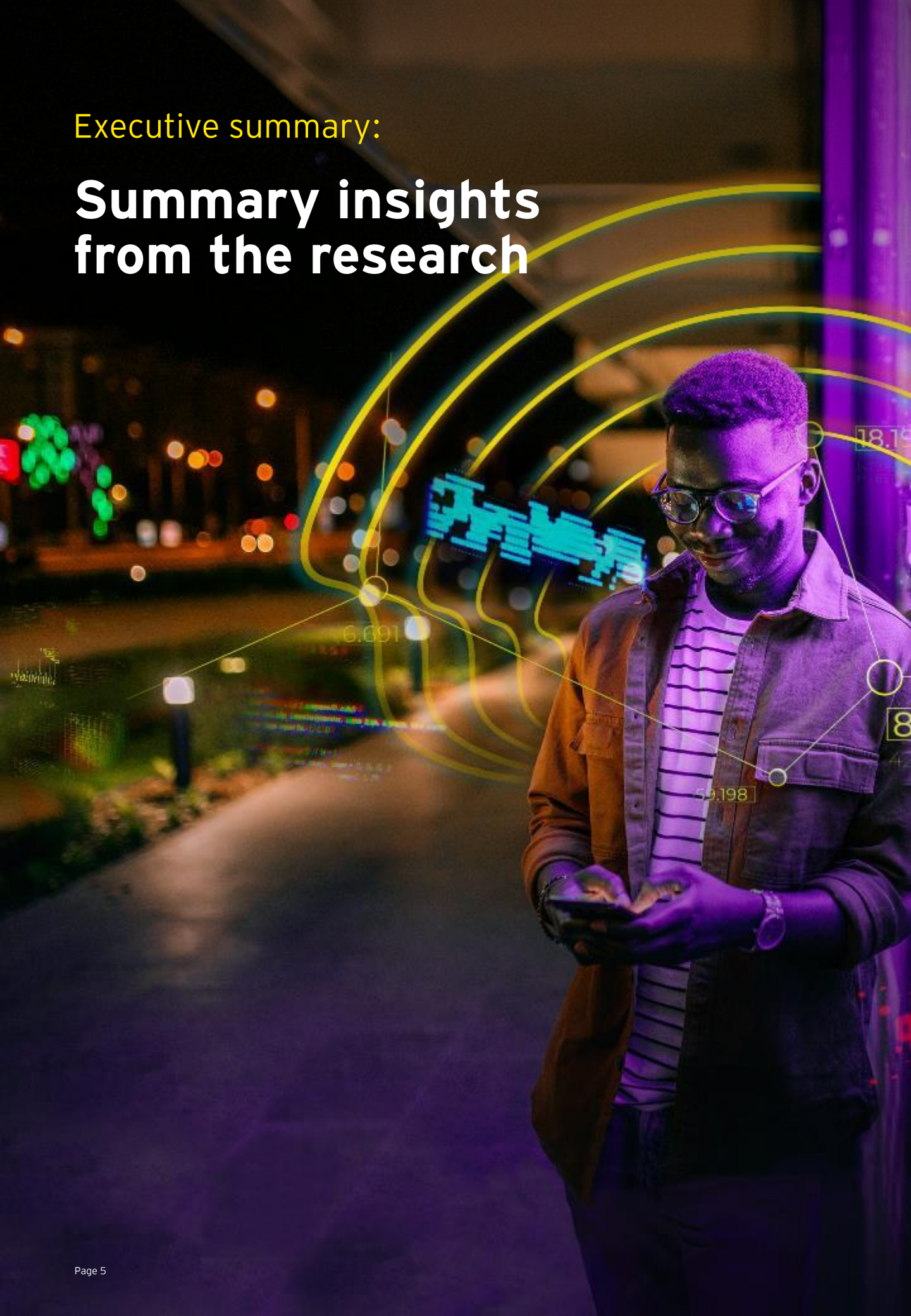
Concern about data security in AI



When it comes to AI, many are concerned about **privacy** and the protection of their personal data.

Executive summary:

Summary insights from the research



Exploring the AI sentiment gap

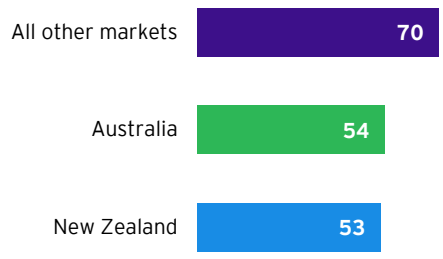
The AI revolution has well and truly captured the attention of governments, commercial organisations and communities across the world. However, this doesn't inherently translate to positive sentiment among everyday people, arguably those who will see and experience the influence of AI either in a work, consumer or citizen capacity.

Our Global AI Sentiment research has found that everyday New Zealanders and Australians have substantially lower comfort with AI than many other markets around the world, particularly those in Asia. If this continues, the risk lies in both markets being left behind as the AI revolution continues to shape our world.

What drives the AI sentiment gap?

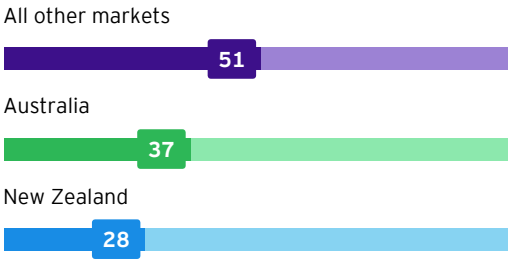
Demographics play a key role in AI sentiment, with several important differences between Australia, New Zealand, and the rest of the world. Older generations are substantially less engaged with AI, which is important due to New Zealand and Australia's aging populations compared to markets such as India. Comfort with AI is also associated with exposure in daily life, with those who consciously use the technology substantially more comfortable with it.

EY AI Sentiment Index (avg out 100)



Source: AI Sentiment Report, January 2025
Base: All respondents, see appendix for detailed sampling
*Note: Average score across all other markets

Believe the benefits of AI outweigh the potential negatives (% agree/strongly agree)



Top markets: China (72%), KSA (69%), UAE (68%), India (58%) and South Korea (58%)

Source: AI Sentiment Report, January 2025
Base: All respondents, see appendix for detailed sampling

What did EY do?

1 Engaged

More than 15,000 people around the world were surveyed about their feelings towards AI, including 2,000 people in New Zealand and Australia. An additional 21 people in New Zealand and Australia also took part in qualitative interviews using an AI research agent.

2 Explored

Via an online survey, people were asked about a variety of topics, including their comfort and excitement for AI, concerns around AI, and who they trust to manage these concerns, and what they are comfortable with AI being used for.

3 Evaluated

All results were compared to everyday people in other markets around the world, providing clear insights for policy makers and organisations in New Zealand and Australia through comparative benchmarks.

Understanding and managing concerns

AI adoption and investment in New Zealand and Australia may potentially be hampered by an overarching concern that the benefits of AI don't outweigh the negatives for society. Many people are concerned about security breaches and a failure to protect their personal data, highlighting the importance of having robust and transparent data protections and legislation in place in both markets.

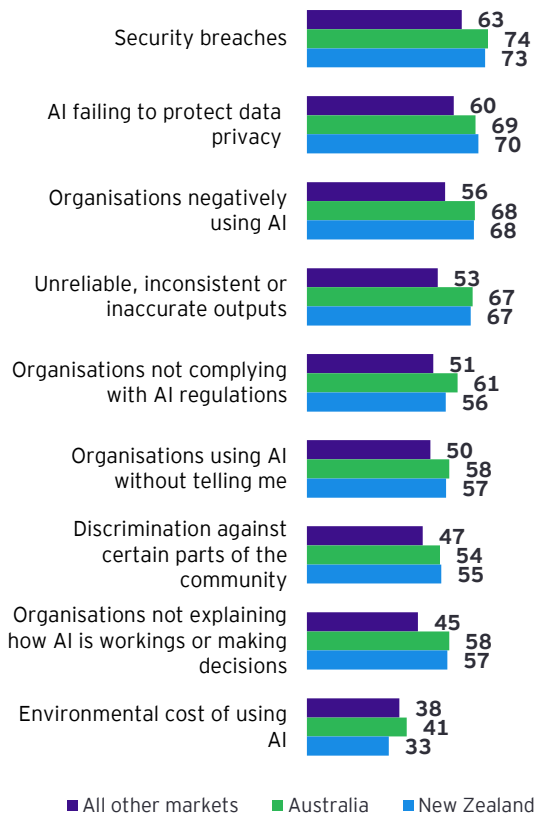
Who is best placed to manage AI concerns?

Across most industry sectors, New Zealanders and Australians have substantially lower levels of trust compared to other markets. There is more pronounced in media and entertainment organisations, as well as government and financial service providers.

It's critical for regulators to overcome this trust deficit, if they are to successfully manage the safe rollout of AI with everyday New Zealanders and Australians and encourage the use of new AI products as they become available.

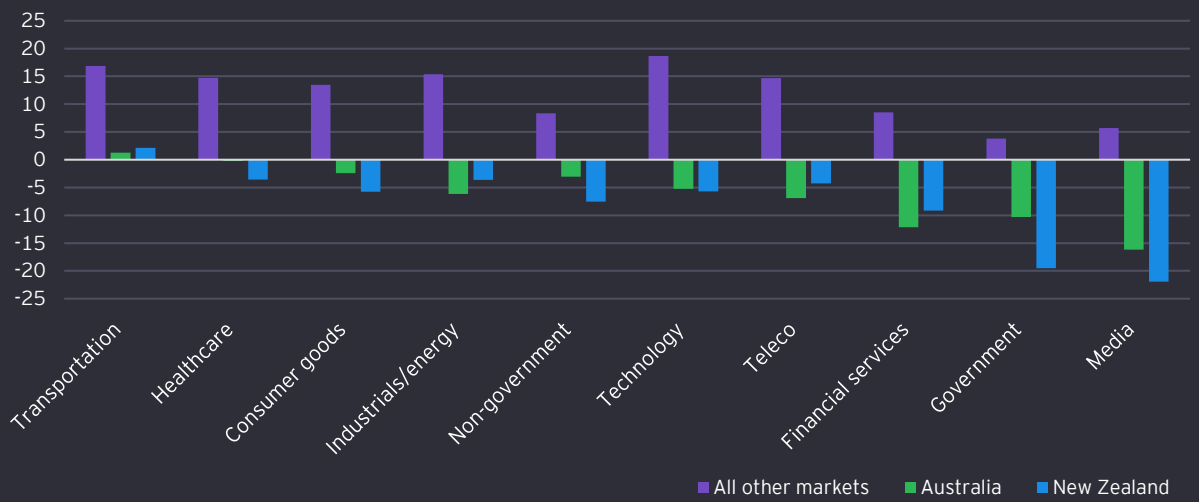
In Australia, historical issues with policies such as 'Robodebt' may be a key factor underpinning this, while in New Zealand there has been substantial national conversation about modernising the country's online safety rules.

The nine major concerns with AI in New Zealand and Australia (% a large concern/a major concern)



Source: AI Sentiment Report, January 2025
Base: All respondents, see appendix for detailed sampling

The level of trust that organisations in each sector will effectively manage AI (avg out of 100*)



Source: AI Sentiment Report, January 2025
Base: Australian and New Zealand respondents, see methodology for detailed sampling
*Note: Average trust rating, -100 indicates a complete distrust, 100 indicates complete trust

Comfort with AI in different scenarios

Although New Zealanders and Australians are less interested in AI than people in other markets, optimism still exists.

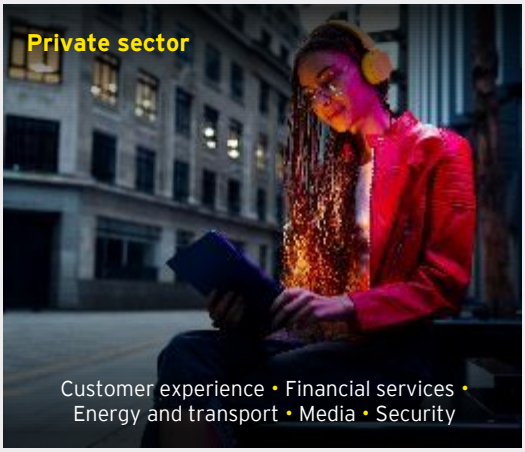
From a governmental perspective, people are optimistic that AI may help optimise healthcare delivery, enhance public safety, and streamline transportation systems, directly impacting the lives of everyday citizens. Everyday people are most comfortable with governments using AI for environmental management, accessing services and to support with crime and justice, though intra market variation exists.

In the private sector, people are looking forward to a future where AI enhances their quality of life, making tasks easier and opening doors to new possibilities. Using AI to support with energy and transport, as well as enhancing security are also key opportunities.

Charting a horizon of innovation and inclusivity

By harnessing the innovative potential of the private sector and the regulatory support of government, everyday people can benefit from a future where AI enriches their lives, creates new opportunities, and addresses pressing societal challenges. It is important that these advancements are inclusive and empower individuals to thrive in an AI-driven world.

Opportunities across government and the private sector:



Opportunities for AI

1 Policy

Policy makers need to build trust among the community and show they can effectively regulate and deploy AI. Currently, they are among the least trusted organisations in this space, which should be a critical focus area.

2 Products

The private sector should continue focusing on its agentic agenda, with a strong focus on creating socially fluent systems, taking AI from the technical to the emotional and enhancing customer experiences.

3 People

Focusing on people is critical. New Zealanders and Australians are nervous about AI, but they also recognise its potential. By placing Humans@Center, developers and government can create an inclusive AI future for everyone.

Detailed report:

AI sentiment in New Zealand and Australia

Contents

Introduction:

Background to the research

About the research

Bringing the voices of everyday people into the global conversations about AI

As AI continues to advance, organisations, governments and communities are seizing opportunities to leverage AI and the benefits this can bring to businesses and individuals alike.

To date, perspectives on AI have been largely shaped at a macro level from the organisations that develop the technology. But how are everyday people thinking about AI?

Overview of the research

To better understand the views of everyday people, their understanding and usage of AI, as well as their concerns and expectations for the future of this technology, more than 15,000 people across 15 markets (shown below) were surveyed.

This document provides a detailed comparative analysis of AI sentiment in New Zealand and Australia, and how this compares to everyday people from other markets around the world.

One market, one voice

To ensure the results of the quantitative survey are representative of the broader population in each market, a random stratified sampling approach was used with quotas on age (18 years and older), gender and location, based on census data.

To ensure each country had an equal say on this topic, all results have been statistically weighted. Functionally, this means any global averages or comparisons shown in this document can be interpreted as one market, one voice.

Due to relatively low internet penetration in markets such as India, China, Brazil, and Japan, any results from these markets should be viewed as representative of their connected consumers who are internet enabled.

Sample profile


Australia
Sample 1,027


Germany
Sample 1,002

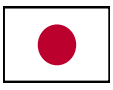

Sweden
Sample 1,002


Brazil
Sample 1,000


India
Sample 1,000


The Kingdom of Saudi Arabia
Sample 500


Canada
Sample 1,000

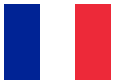

Japan
Sample 1,001


United Arab Emirates
Sample 506


China
Sample 1,000


New Zealand
Sample 1,009


UK
Sample 1,003


France
Sample 1,005


South Korea
Sample 1,001


USA
Sample 2,004

Note: figures in this report are subject to rounding and therefore may sum to more than 100%

Agentic interviewing: the future of sentiment tracking

As part of this project, our team utilised a trained AI research agents (AIRA) to engage respondents in deep conversational interviews. This allowed us to expand on the quantitative survey by producing a large qualitative dataset with extensive insights on the topic of AI.

What is an AIRA?

An AIRA is a specially calibrated chatbot that has been programmed and trained to emulate a skilled social researcher. For this project, our AIRA was carefully calibrated by a professional team of EY consultants with deep training in social research and prompt engineering (we refer to these professionals as Social Architects).

The calibration process involved briefing the AIRA on the core objectives of the research, the desired conversational flow with respondents and the preferred length of conversation. Once the calibration process was completed, the AIRA was deployed with real-world respondents across all 15 markets in the research, including New Zealand and Australia.

Results from the AIRA from the New Zealanders and Australians have been interwoven with quantitative results throughout this document and have been crucial for the development and deployment of our research narrative.

Reach out for a trial

Our AIRA is a market-leading research technology. If you, or your team, would like to try your own research agent, reach out to an EY representative and we will be delighted to support you.

Erik Heller
Partner, EY Oceania

Explore the benefits of an AI research agent for your insights team

Speed

AI research agents empower your insights team to work as previously unrivalled speed. By augmenting human insights managers with a highly calibrated AI interface, you can collect data at incredible speed, while still maintaining data quality.

Depth

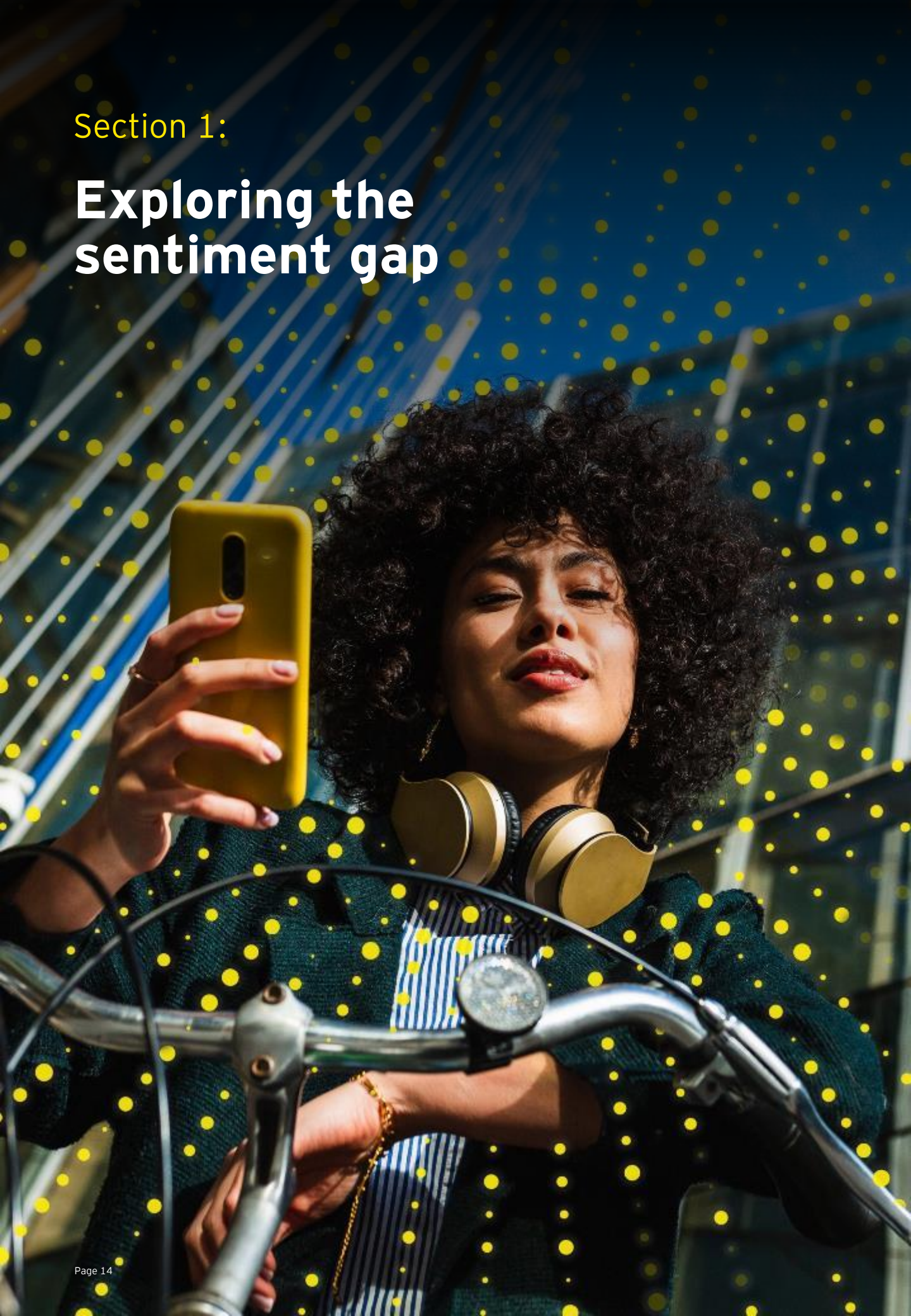
AI research agents bridge the gap between structured and unstructured data, offering the depth of the spoken word, with the power of statistical modelling – empowering your business to truly bring the voice of your customers into the boardroom.

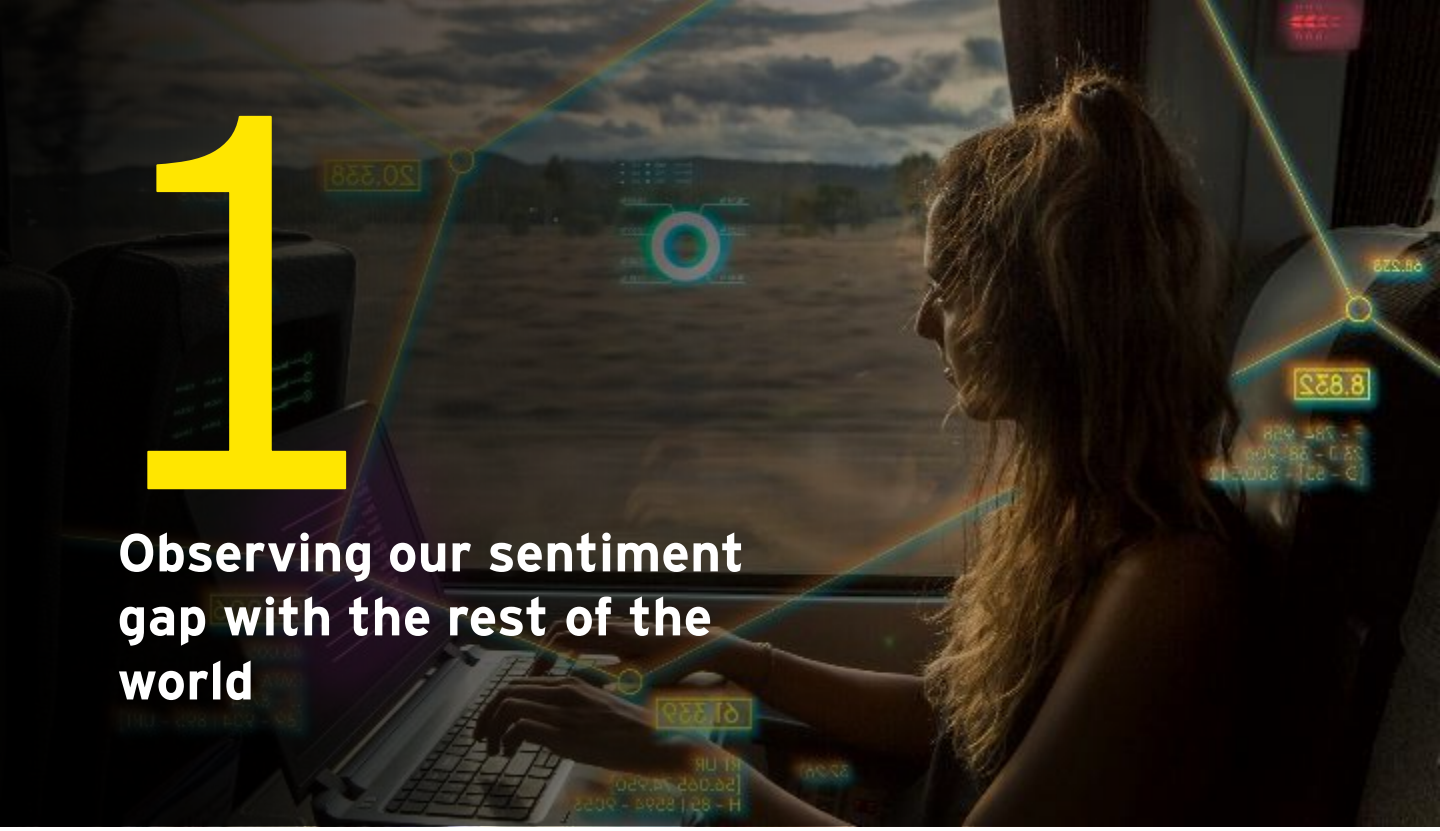
Efficiency

AI research agents offer unrivalled value for organisations. By collecting feedback, at speed, our AIRA makes insights more accessible, a core part of our mission to place Humans@Center.

Section 1:

Exploring the sentiment gap





1

Observing our sentiment gap with the rest of the world

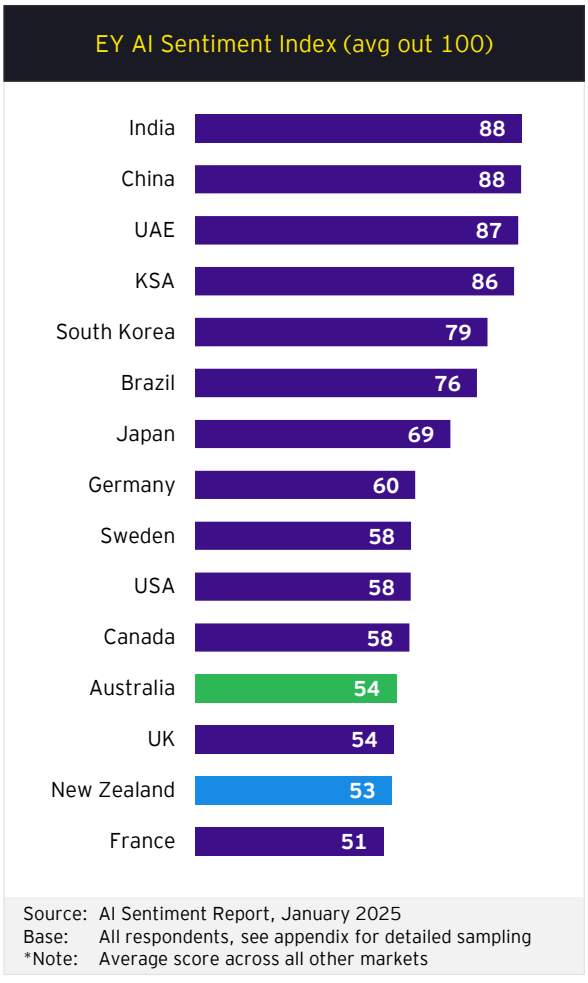
Everyday people in New Zealand and Australia feel more apprehensive about AI than many other parts of the world.

New Zealanders and Australians have substantially lower sentiment towards AI than many other markets around the world, particularly those in Asia. Among other things, this gap in sentiment is driven by differences in demographics. For example, older audiences in New Zealand and Australia are substantially less excited about AI compared to older audiences in other countries.

There is also support for other research programs that demonstrate a distinct gender gap in sentiment towards AI, highlighting the ongoing need to support women in technology and STEM fields.

Employment also has a role in driving sentiment towards AI, with those in professional roles feeling more comfortable about the technology than other industries.

See the next page for a detailed breakdown of demographic differences in both markets.

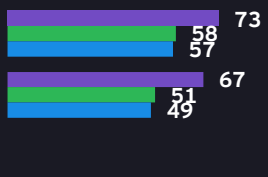


Source: AI Sentiment Report, January 2025
Base: All respondents, see appendix for detailed sampling
*Note: Average score across all other markets

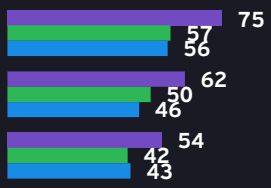
AI comfort levels in key demographics compared to all other markets (avg out of 100)

Personal profiles

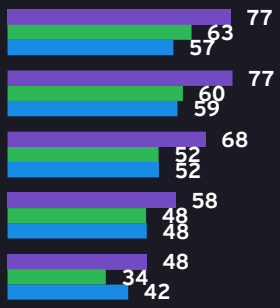
Self-reporting gender



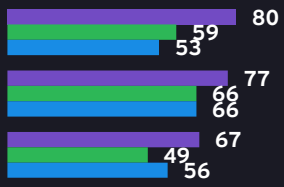
Education level



Generation

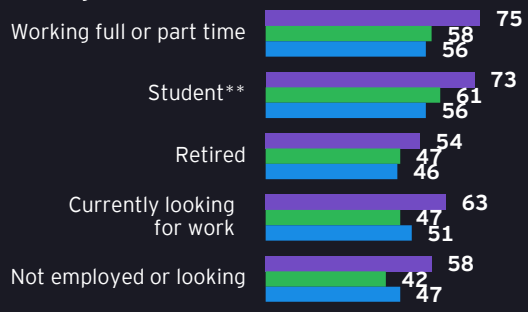


Other relevant information

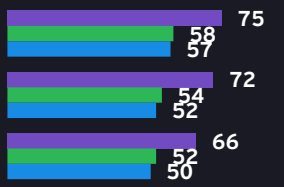


Working profile

Working status

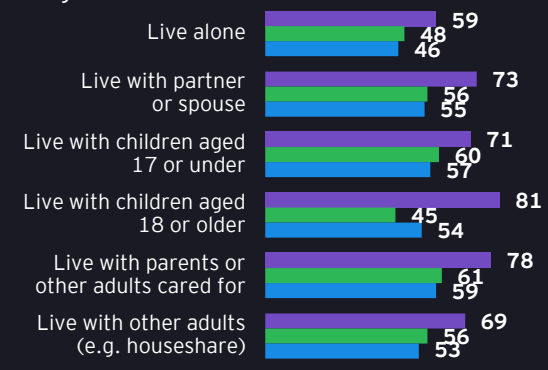


Nature of professional role

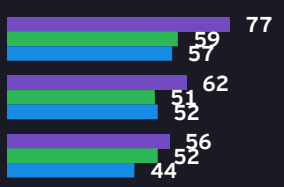


Living situation and location

Living situation



Living location



All other markets Australia New Zealand

Source: AI Sentiment Report, January 2025
Base: All respondents, see appendix for detailed sampling
*Note: There is insufficient sample size to report these figures
**Note: Sample size is below 30 for New Zealand and Australia, so results should be viewed as indicative only

Balance between comfort and expected impact

Lower sentiment in New Zealand and Australia is often linked to people's scepticism about the promise of AI

When asked about the expected impact of AI, New Zealanders and Australians are significantly more concerned about the potential negatives than people in other markets. In contrast, everyday people in markets like China, the UAE, India, South Korea overwhelmingly believe the impact of AI will be positive over the next five years.

When asked about concerns with AI, New Zealanders and Australians are mainly focused on risks to privacy and data security at this time.

What everyday people said

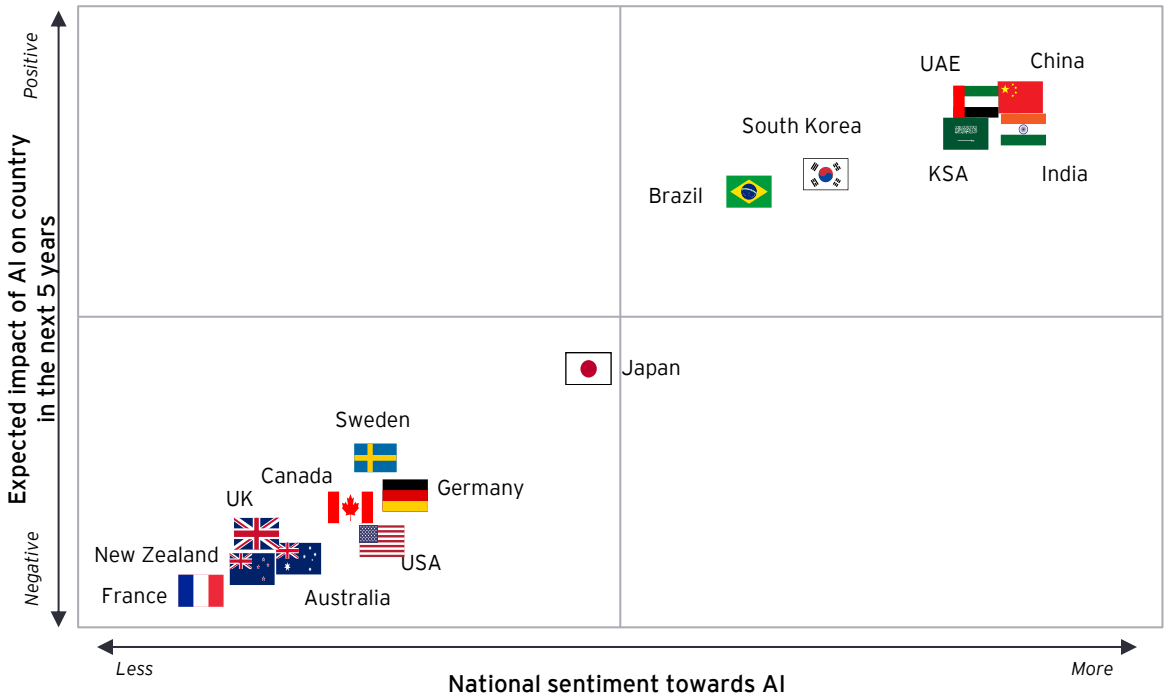
> I don't like it when I come across it. Find it very invasive and annoying.
>
> New Zealand, Woman, aged 35-49, Working - full time

> AI is semi-helpful, but sometimes requires repeat instructions which doesn't save as much time as I expect it to.
>
> Australia, Woman, aged 35-49, Working - full time

> AI has its uses in the ability to speed up searching for data but is risky in terms of dehumanizing work and creativity.
>
> New Zealand, Woman, aged 50+, Working - part time

Source: AI Sentiment Report, January 2025
Base: Everyday Australian and New Zealanders, n=21

Mapping markets based on their comfort with AI, and the expected impact over the next five years



Source: AI Sentiment Report, January 2025
Base: All respondents, see appendix for detailed sampling

Excitement for AI

Another factor behind lower AI sentiment in New Zealand and Australia is a lack of excitement about AI. Are New Zealanders and Australians being dragged towards the technology, rather than welcoming it?

Even if everyday New Zealanders and Australians can be helped to feel comfortable with AI, there is a fundamental issue with enthusiasm that needs to also be overcome before the technology can truly capture the imaginations and entrepreneurial spirits of both markets. While comfort with AI is important, it won't be sufficient on its own.

Enthusiasm and excitement about the potential of AI are crucial for its widespread adoption and for fostering innovation.

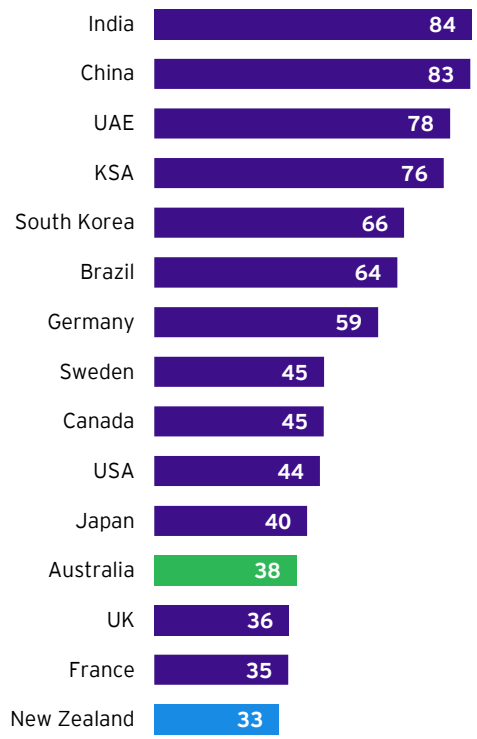
Who is more comfortable with AI?

As with comfort, gender and age play a substantial role in shaping attitudes towards AI in both markets. Younger men are generally more likely to feel excited about the future of AI and what it means for them. This demographic tends to be more tech-savvy, being the first digital natives or growing up in tandem with technology and being more accustomed to rapid technological advancements.

Their excitement is often fuelled by the possibilities that AI presents for career opportunities, creative projects, and solving complex problems.

In contrast, older and female audiences are substantially less excited about AI. This lack of enthusiasm may be due to several factors, including limited exposure to technology, concerns about job displacement, and a general apprehension towards the unknown.

I am excited for the future of AI and what it means for me (% agree/strongly agree)



Source: AI Sentiment Report, January 2025
Base: All respondents, see appendix for detailed sampling

What we heard from everyday people

> I just feel like we have less and less privacy and we as humans are becoming less and less useful.

New Zealand, Man, aged 35-49, Working - part time

> I don't know a lot about AI but I am interesting in finding out more about it, [learning] about how this will affect me and how it will change the world we live in.

New Zealand, Woman, aged 50+, Other - not working

Source: AI Sentiment Report, January 2025
Base: Everyday Australian and New Zealanders, n=21

Australia over time

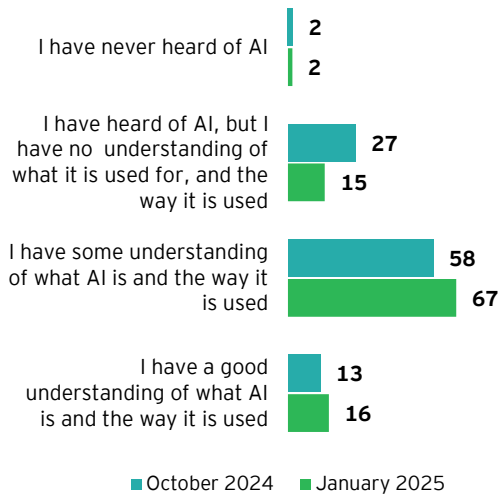
Compared to previous research, undertaken by EY Oceania last year, self-reported understanding of AI has increased marginally.

Perceived understanding of AI in Australia has increased moderately in the three months between October 2024 and January 2025, with proportion of who've heard of AI but possess no understanding decreasing from 27% to 15%. This decline indicates a growing awareness of AI's presence in society and its potential applications, while those who have never heard of AI remained steady at 2%.

Increasing understanding of AI may reflect the heightened presence it has in media discourse and everyday life. As AI continues to permeate various sectors, such as healthcare and entertainment, public discourse around AI has intensified. The EY AI Sentiment Index for Australia has also seen an uptick, rising from 51 to 54.

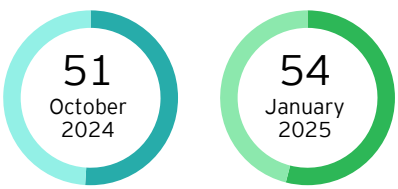
This increase indicates that Australians are beginning to feel more at ease with the concept of AI, even if they do not fully understand its complexities.

Knowledge of AI (%)



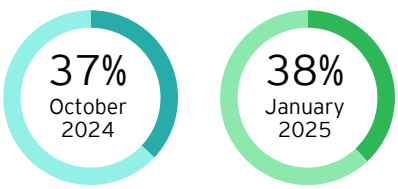
Source: AI Sentiment Report, October 2024 and January 2025
Base: All respondents, see appendix for detailed sampling

EY AI Sentiment Index (avg out 100)



Source: AI Sentiment Report, October 2024 and January 2025
Base: All respondents, see appendix for detailed sampling

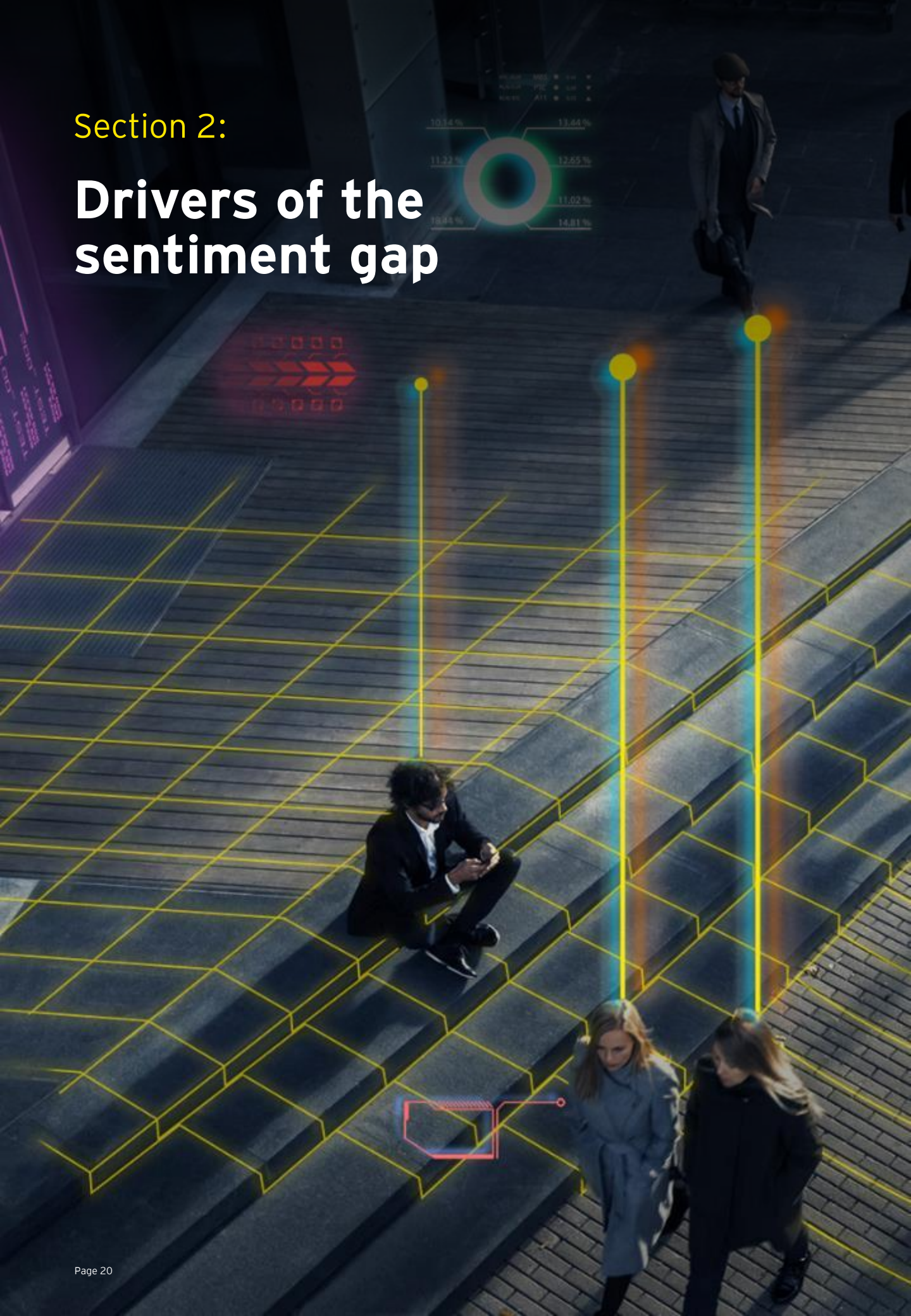
I am excited for the future of AI and what it means for me (% agree/strongly agree)



Source: AI Sentiment Report, October 2024 and January 2025
Base: All respondents, see appendix for detailed sampling

Section 2:

Drivers of the sentiment gap



2

Addressing the attitudes that impact sentiment

To bridge the AI sentiment gap, it is essential to address some of the negative perceptions of AI.

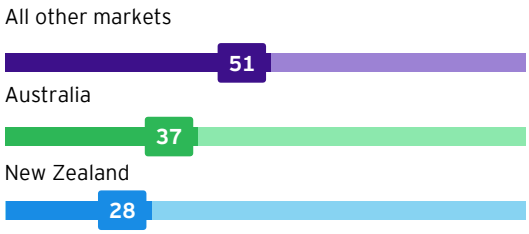
The sentiment gap in both New Zealand and Australia is underpinned by a variety of perceptions and attitudes that are either negative towards AI or reflect a level of cultural apathy that is hindering adoption.

As a result, AI adoption and investment in New Zealand and Australia may potentially be hampered by an overarching concern that the benefits of AI don't outweigh the negatives for society.

Diving deeper, top-of-mind concerns for everyday New Zealanders and Australians are AI systems suffering security breaches or failing to protect the privacy of their personal data. Furthermore, there is some concern about organisations failing to hold themselves accountable for negative AI use.

This trust deficit will be critical to address over the coming years in both markets, if they are to avoid falling behind other parts of the world. To do this, there needs to be a single vision between governments and commercial organisations to help build a degree of trust that AI regulations and investments are being deployed ethically and transparently.

Believe the benefits of AI outweigh the potential negatives (% agree/strongly agree)



Top markets:

China (72%), KSA (69%), UAE (68%), India (58%) and South Korea (58%)

Source: AI Sentiment Report, January 2025
Base: All respondents, see appendix for detailed sampling

What everyday people said

"It's the way of the future but I'm sure there will always be people with negative attitudes.

Australia, Woman, aged 50+, Retired

"I don't know how I feel about it I can see that it will be very useful when used correctly but if we abuse it, it won't end well.

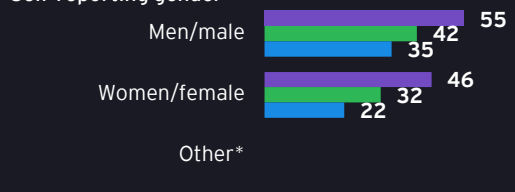
New Zealand, Woman, aged 18-34, Working - part time

Source: AI Sentiment Report, January 2025
Base: Everyday Australian and New Zealanders, n=21

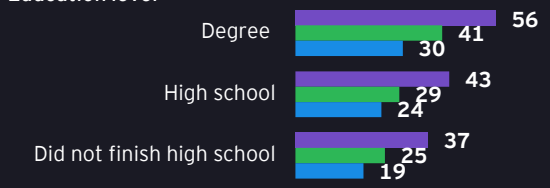
Believe the benefits of AI outweigh the potential negatives (% agree/strongly agree)

Personal profiles

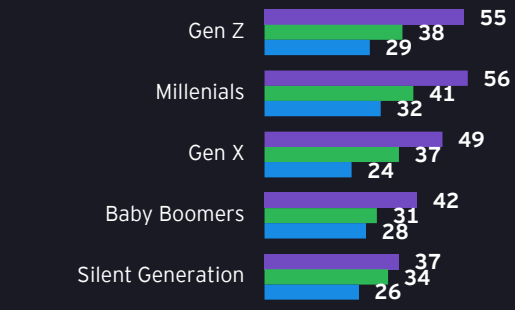
Self-reporting gender



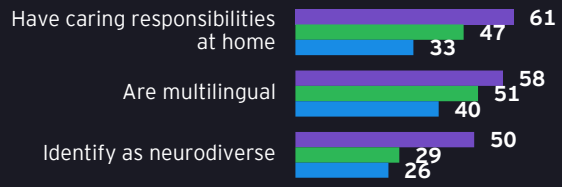
Education level



Generation

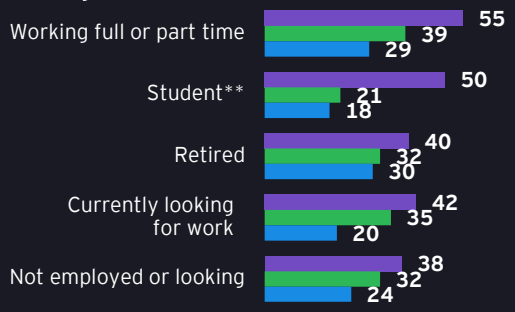


Other relevant information



Working profile

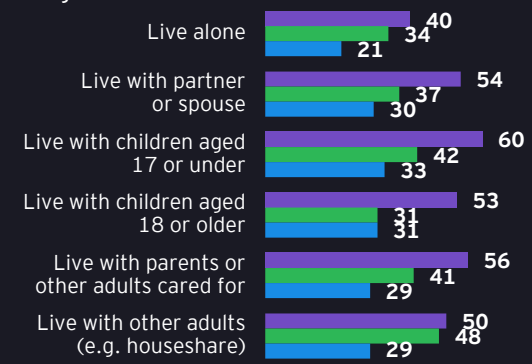
Working status



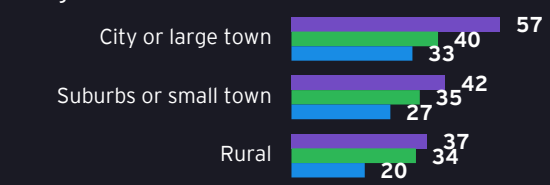
Nature of professional role

Living situation and location

Living situation



Living location



All other markets | Australia | New Zealand

Source: AI Sentiment Report, January 2025
Base: All respondents, see appendix for detailed sampling
*Note: There is insufficient sample size to report these figures
**Note: Sample size is below 30 for New Zealand and Australia, so results should be viewed as indicative only

The trust deficit and blurring of reality

A key component of the AI sentiment gap is an underlying concern that AI could exacerbate the trust crisis that many Western countries are currently experiencing around media.

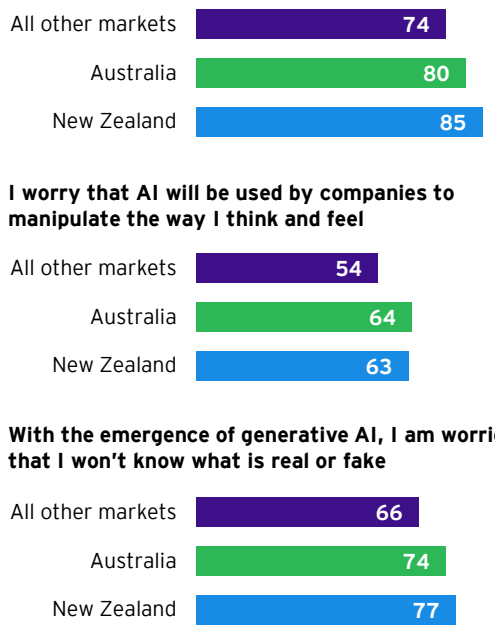
While other markets are also concerned about issues like false information generated by AI being taken seriously, New Zealanders and Australians have some of the highest concerns of all. This perception is linked to a deep concern that generated content, such as deep fakes, could be used by companies to manipulate consumers.

If these concerns are not addressed, then everyday people in both markets are concerned about a variety of potential consequences. For example, over half of Australians believe AI is making people less intelligent, possibly related to a perceived overreliance and the risk of fake information being generated and disseminated. There are also concerns about the impact AI could have on vulnerable segments of the population, including children and people who may identify as neurodiverse or as having disabilities.

If these concerns (and potential issues) are not effectively managed, it could result in parts of the population not leveraging the potential benefits AI can offer, simply because they are concerned about the potential risks they, and their families, may be exposed to.

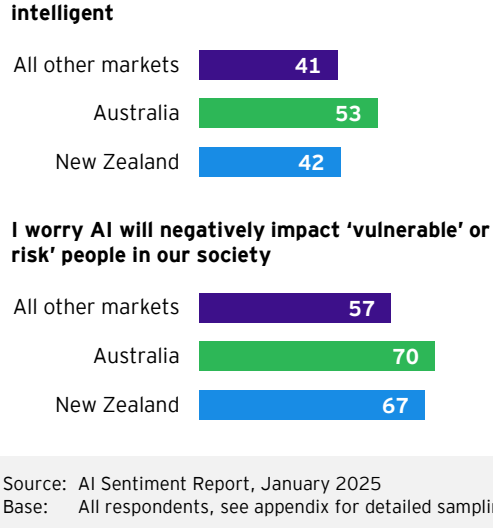
This could have substantial ramifications for social outcomes, with sectors like education and healthcare set to be revolutionised by AI. If a substantial segment of New Zealanders and Australians don't feel comfortable about the technology, then they may be disadvantaged as a result.

Attitudes about AI and the potential impact on trust (% agree/strongly agree)



Source: AI Sentiment Report, January 2025
Base: All respondents, see appendix for detailed sampling

Perceived social impact if AI is not managed effectively (% agree/strongly agree)



Source: AI Sentiment Report, January 2025
Base: All respondents, see appendix for detailed sampling

Australia over time

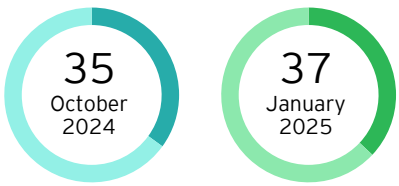
Positively, these trends are beginning to shift over time in Australia. For example, 37% believe the benefits of AI outweigh the potential negatives, marginally higher than in October 2024 (35%). This may stem from a growing awareness of AI and the potential for it to positively impact society, at-large.

Despite this, there was a slight increase in Australian concerns about companies leveraging AI to manipulate the way individuals think and feel. This apprehension highlights a critical tension between the perceived advantages of AI and the ethical implications of its use.

As a result, there is rising awareness of the potential social risks if AI is not managed effectively. In January 2025, over half, 53% of Australians now believe that AI is making people in their country less intelligent, an increase from 48% just 3 months prior. This concern suggests a broader anxiety about the implications of reliance on technology and the potential erosion of critical thinking skills in an increasingly automated world.

There is also growing concern among Australians about the potential impact on vulnerable or at-risk members of society (a 5% increase since October). This growing concern underscores the need for a thoughtful approach to AI implementation, particularly in areas where its effects may disproportionately affect those who are already marginalized or disadvantaged.

Believe the benefits of AI outweigh the potential negatives (% agree/strongly agree)



Source: AI Sentiment Report, October 2024 and January 2025
Base: All respondents, see appendix for detailed sampling

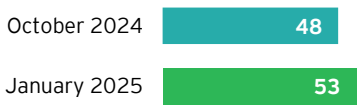
Attitudes about AI and the potential impact on trust (% agree/strongly agree)

I worry that AI will be used by companies to manipulate the way I think and feel

Source: AI Sentiment Report, October 2024 and January 2025
Base: All respondents, see appendix for detailed sampling

Perceived social impact if AI is not managed effectively (% agree/strongly agree)

AI is making people in my country less intelligent



I worry AI will negatively impact 'vulnerable' or 'at risk' people in our society

Source: AI Sentiment Report, October 2024 and January 2025
Base: All respondents, see appendix for detailed sampling

Concerns about AI

There are a variety of specific concerns when it comes to AI, most of them relate to data security, privacy and organisations failing to hold themselves accountable.

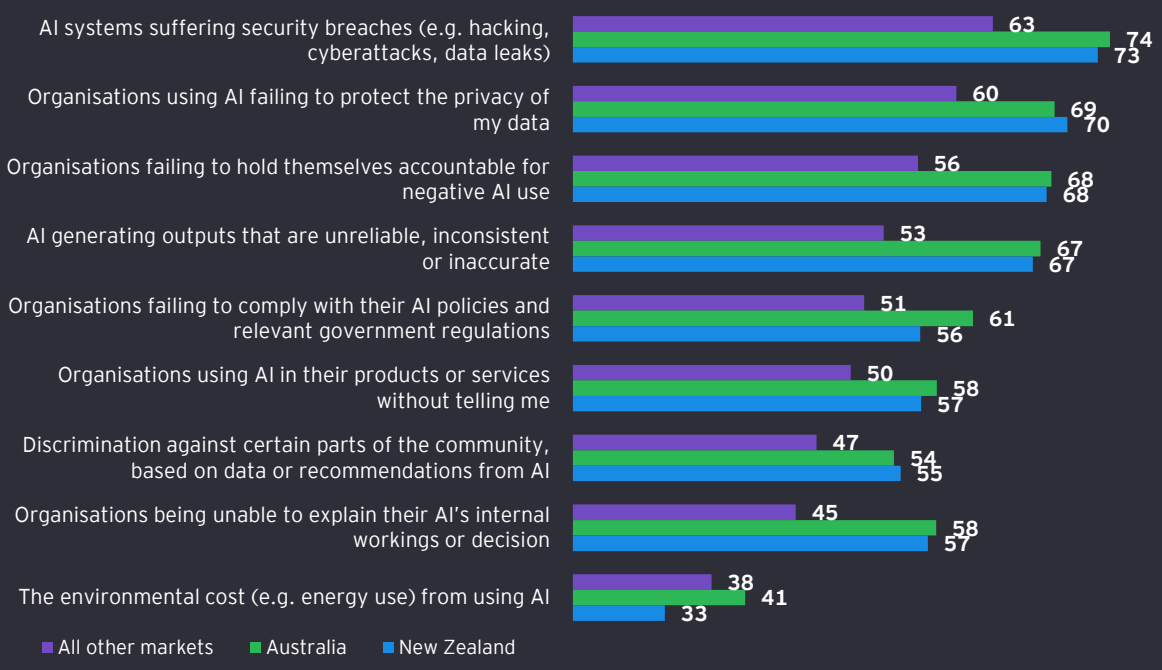
Diving deeper, top-of-mind concerns for everyday New Zealanders and Australians are AI systems suffering security breaches, organisations that use AI failing to protect the privacy of their data and failing to hold themselves accountable for negative AI use.

This trust deficit will be critical to address over the coming years in both markets, if they are to avoid hesitation or resistance to AI adoption. To do this, there needs to be a single vision between governments and commercial organisations. This will help build a degree of trust that AI regulations and investments are being deployed ethically and transparently.

Key difference by demographics

- Across all markets, Females tend to be more concerned than males, with the biggest differences relating to concern around data protection (63% females bs 59% males), and with organisations using AI in products or services without telling people about it (53% females, 49% males)
- Concern rises in line with generation, however concerns about the environmental cost is similar across all generations

The nine major concerns with AI in New Zealand and Australia
(% a large concern/a major concern)



Source: AI Sentiment Report, January 2025
Base: All respondents, see appendix for detailed sampling

Groups trusted to manage concerns about AI

Financial services and government organisations are among the groups that New Zealanders and Australians trust least to manage AI in a way that aligns with their best interests.

Across most industry sectors, New Zealanders and Australians have substantially lower levels of trust compared to other global markets. There is particular distrust in media and entertainment organisations, as well as government and financial service providers.

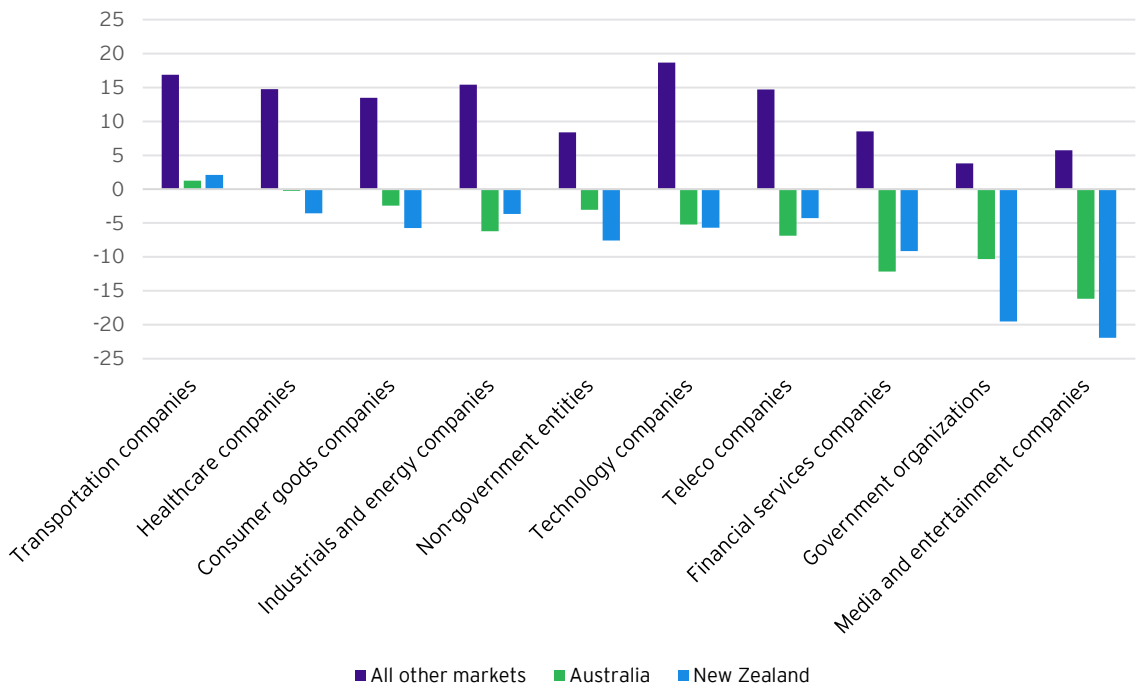
It's critical for regulators to overcome this trust deficit, if they are to successfully manage the safe rollout of AI with everyday New Zealanders and Australians and encourage usage of new AI products as they become available.

In Australia, historical issues with policies such as 'Robodebt' may be a key factor underpinning this, while in New Zealand there has been substantial national conversation about modernising the country's online safety rules.

Both issues are potential explanations for why everyday New Zealanders and Australians are less convinced about their government's ability to effectively manage a rapidly advancing and highly complex technology like AI.

Undertaking deep community consultation and having a clear vision for AI, which is effectively communicated to the community, will be critical to overcome these perceptions.

The level of trust individuals have that each group will manage AI in a way that aligns with their best interests (avg out of 100*)



Source: AI Sentiment Report, January 2025
Base: Australian and New Zealand respondents, see methodology for detailed sampling
*Note: Average trust rating, -100 indicates a complete distrust, 100 indicates complete trust

Acknowledging the need for a social contract

These results show that people in New Zealand and Australia recognise no single organisation, or government regulator, can fully manage their concerns about AI.

Regulators, private companies and individuals all need to cooperate to address the ethical, social, and economic implications of AI, help address the challenges posed by AI and harness its potential for the benefit of society as a whole.

Regulators are tasked with the critical role of establishing comprehensive frameworks that not only address the immediate risks of AI but also anticipate future challenges. These frameworks should be flexible enough to adapt to the rapid pace of technological advancement while ensuring that ethical considerations remain at the forefront.

Private sector organisations must also commit to transparency and accountability, fostering trust among users and stakeholders. This includes investing in robust testing and validation processes to minimise security breaches and data privacy risks in AI systems, which are the top areas of concern for everyday people.

Individuals also play a pivotal role in this ecosystem. By fostering a culture of informed engagement, individuals can contribute to a more balanced dialogue about AI, ensuring that their voices are heard.

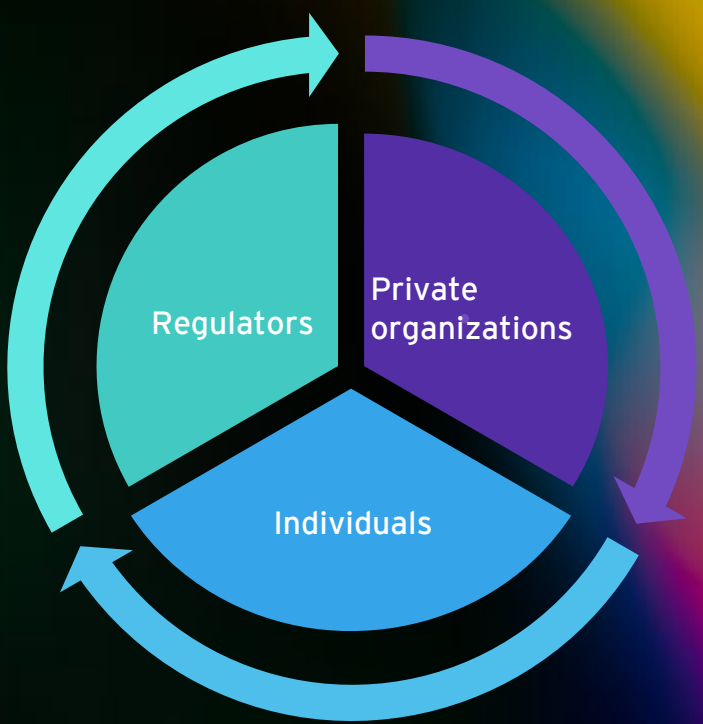
Ultimately, a collaborative approach not only enhances the effectiveness of governance strategies but also empowers all stakeholders to take an active role in shaping the future of AI.

“

The benefits and the risks associated with AI cannot belong to one group of stakeholders, everyone needs to have a part.

Together, we can use this technology to drive outcomes for all people in New Zealand and Australia.

Katherine Boiciuc
EY CTIO, Oceania



Section 3:

The integration of AI into day-to-day lives

3

Conscious engagement with AI

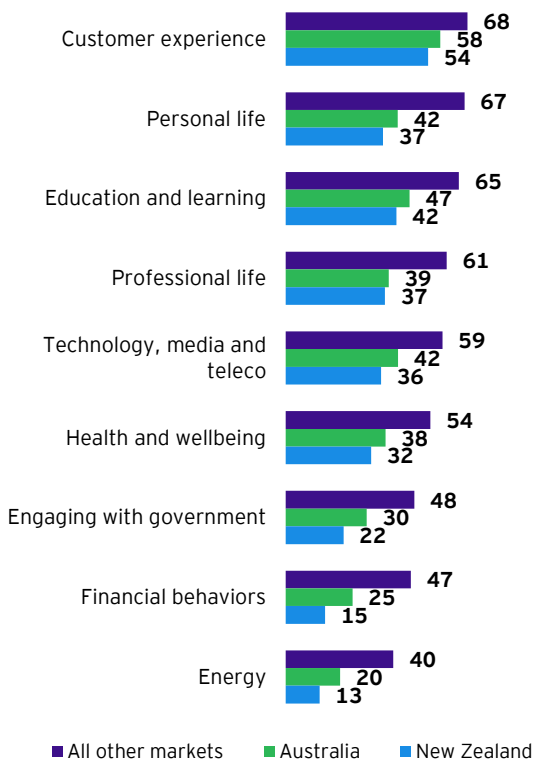
With their elevated concerns about AI, it may be unsurprising that New Zealanders and Australians consciously use AI less than their international counterparts.

The sentiment gap has a clear impact on people's willingness to adopt AI into their everyday lives, with significantly fewer New Zealanders and Australians consciously using the technology.

In both markets, everyday people are less likely to take advantage of the educational and financial opportunities associated with AI. In addition, there is a substantial gap in the proportion who say they are consciously using AI in their personal and professional lives.

Over the coming pages, there is a detailed analysis across each of these life scenarios, including the perceptions and attitudes that may be holding people back.

Deliberate usage of AI across different life scenarios (%)



Source: AI Sentiment Report, January 2025
Base: All respondents, see appendix for detailed sampling

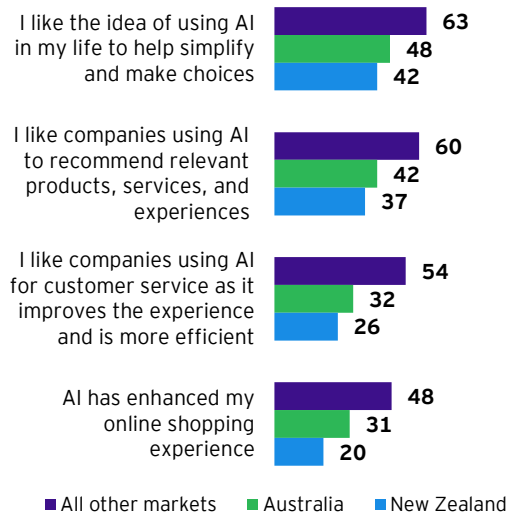
Integration into customer experience

Chatbots and support agents are currently the most common form of AI that Australian and New Zealand consumers use as part of their customer experiences.

Usage may be expanding however, with an increasing proportion saying they have also consciously used AI to help expedite the shopping process. For example, approximately 1 in 10 used AI to create shopping lists and/or auto-refill their online shopping baskets.

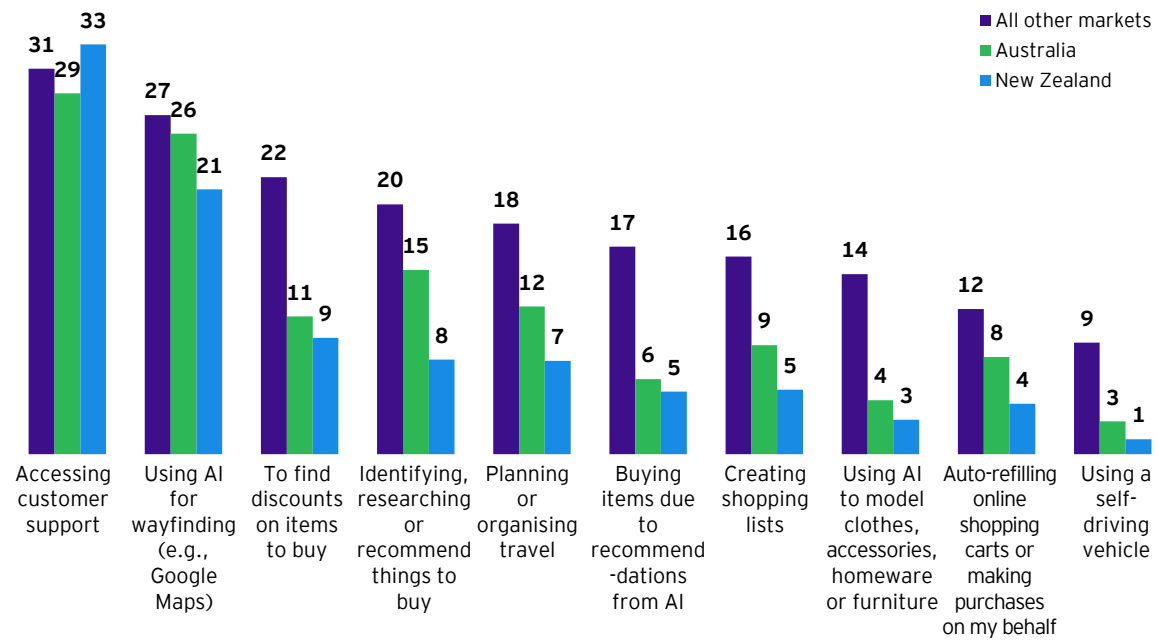
Interestingly, these results also highlight that a substantial portion of consumers may be oblivious to the proliferation of AI in their journeys, with less than half saying they've used AI for wayfinding (for example when using Google Maps). Given that AI is almost ubiquitous in this space, it highlights the opportunity to educate consumers on the benefits they may already be receiving from AI.

Sentiments towards AI in customer service (% agree/strongly agree)



Source: AI Sentiment Report, January 2025
Base: Those who have consciously interacted with AI for customer service over the last 6 months

How New Zealanders and Australians have consciously used AI as part of the customer experiences over the last 6 months (%)



Source: AI Sentiment Report, January 2025
Base: Those who have consciously interacted with AI for customer experiences over the last 6 months

Integration into personal lives

There is growing integration of AI into the personal lives of everyday New Zealanders and Australians, with substantial implications for policy makers and the private sector.

It will be critical for this shift to be supported by the development of policies that encourage responsible use of AI in personal setting. On the other side, if done ethically, private organisations have a range of opportunities to augment everyday lived experiences by designing diverse tools.

Currently, New Zealanders and Australians have a notable emphasis on language translation and practice, and with cooking assistance. The interest in using AI for language-related tasks suggests a growing awareness of the technology's potential to bridge communication gaps, which could inform educational initiatives and language learning programs. Additionally, the use of AI in cooking and recipe creation may reflect a desire to explore with generative AI and see what it is ultimately capable of.

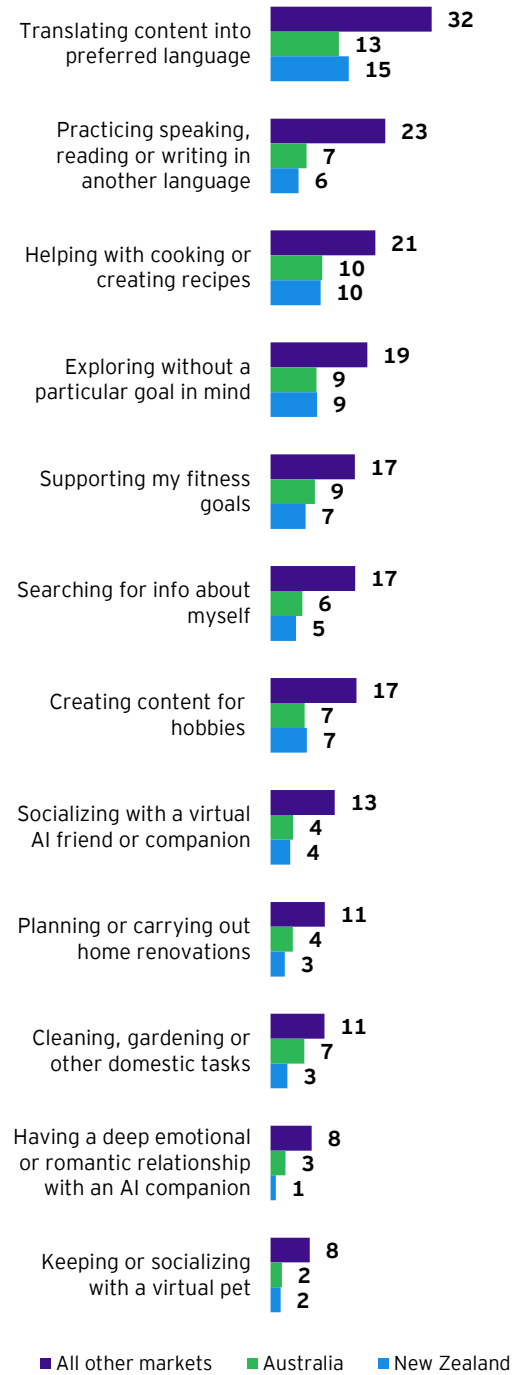
There is also substantial engagement across other personal applications, such as fitness support and social interaction with virtual companions.

The emergence of AI companionship

Interestingly, there a small but substantive subset of the population who also leveraging AI for their emotional needs-states, including 1 in 10 socialising with a virtual friend/companion and 1 in 20 owning virtual pets at a global level.

Beyond this, 3% of Australians and 1% of New Zealanders have transitioned from simple social relationships with AI companions to having deep emotional and/or romantic relationships, compared to nearly 1 in 10 at a global level.

How people have interacted with AI in the personal lives over the last 6 months (%)



Source: AI Sentiment Report, January 2025
Base: Those who have consciously interacted with AI in their personal life over the last 6 months

Integration into education

There is a growing reliance on AI for learning and academic support, suggesting that both policy makers and educational institutions need to adapt to this evolving landscape.

Across both New Zealand and Australia, there is a substantial shift in how education is being approached and the usage of AI to augment this process. Across both markets, people are utilising AI for various educational tasks, with a strong emphasis on improving writing skills and conducting research.

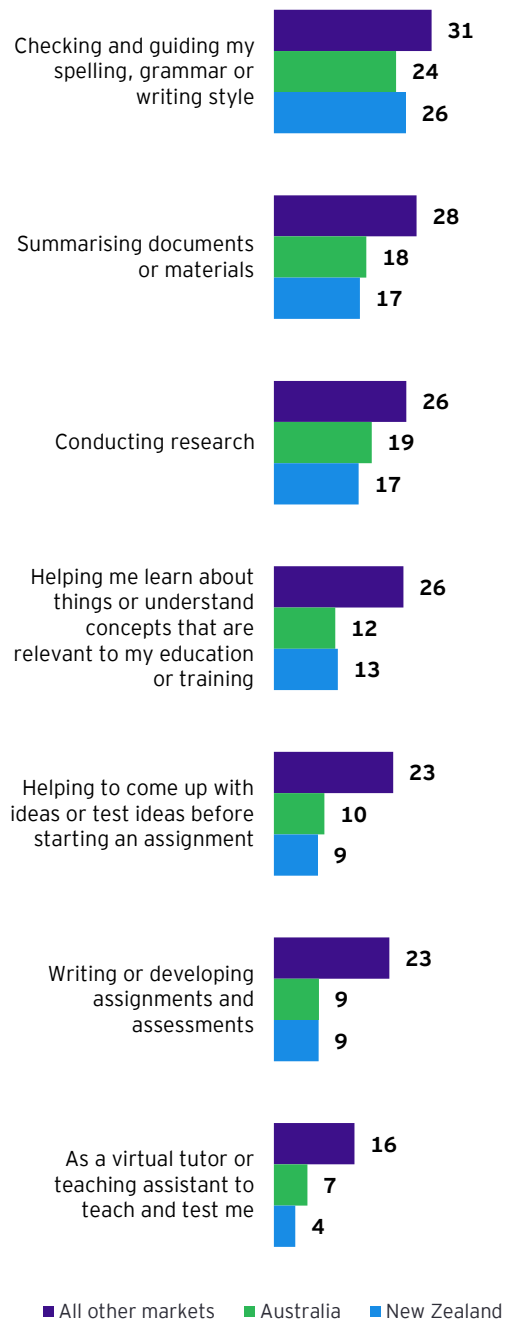
This widespread use of AI for checking spelling, grammar, and writing style highlights a growing recognition of the importance of effective communication in academic settings.

Additionally, the ability to summarise documents and conduct research with AI suggests learners are seeking efficient ways to gather and synthesise information to enhance their overall educational experience.

A potential shift in learning methods?

Moreover, the data indicates varying levels of engagement with AI across different educational applications, such as assistance of AI to learn content and use virtual tutors.

How people have interacted with AI for education purposes over the last 6 months (%)



Source: AI Sentiment Report, January 2025
Base: Those who have consciously interacted with AI for educational purposes over the last 6 months

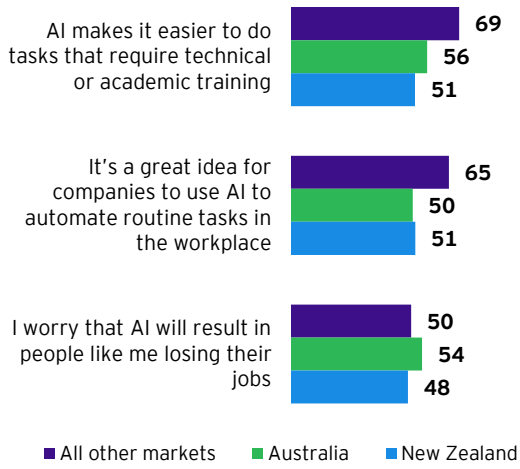
Integration into professional life

As AI continues to enhance productivity and efficiency, it's essential for businesses to consider how it can be integrated into daily operations and addressing potential skills gaps in the workforce.

The data indicates varying levels of engagement with AI across different professional applications, such as reviewing work outputs and assisting with career aspirations. In particular, many people are now using generative AI for content creation, such as documents and emails, highlights a growing recognition of the efficiency that these tools can bring to daily tasks.

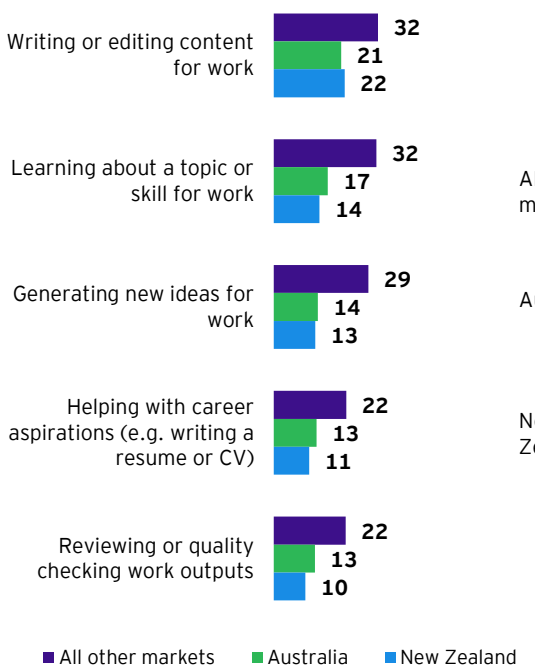
Additionally, the use of AI for learning new skills and generating ideas reflects a proactive approach among professionals to leverage technology for personal and career development.

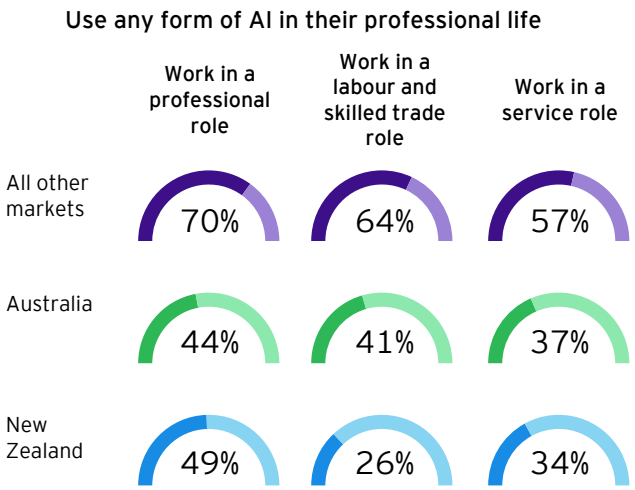
Sentiments towards AI in the workplace (% agree/strongly agree)



Source: AI Sentiment Report, January 2025
Base: Those who have consciously interacted with AI in the workplace over the last 6 months

How New Zealanders and Australians have consciously used AI for professional reasons over the last 6 months (%)





Source: AI Sentiment Report, January 2025
Base: Those who have consciously interacted with AI for professional reasons over the last 6 months

Health and government services

People are engaging with AI for healthcare, and the government, in diverse ways. This highlights the importance for service providers to continue looking for opportunities to integrate AI.

From a healthcare perspective, individuals are primarily using AI for monitoring health through wearable devices, such as smartwatches, which underscores a proactive approach to personal health management.

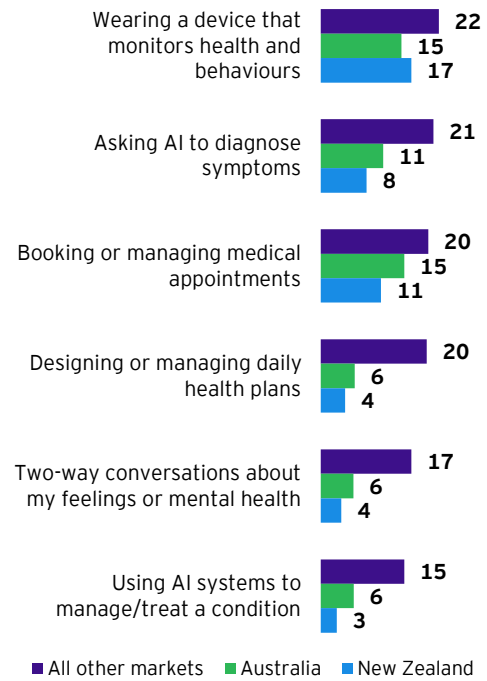
The interest in AI for symptom description and potential diagnosis suggests that consumers are increasingly turning to technology for preliminary health assessments, which could alleviate pressure on healthcare systems.

Additionally, the high engagement in using AI for booking and managing medical appointments also reflects a desire for convenience and efficiency in accessing healthcare services. This trend presents opportunities for healthcare providers to leverage AI tools to enhance patient engagement and streamline service delivery.

AI is also playing a key role for individuals to contact and engage with government services

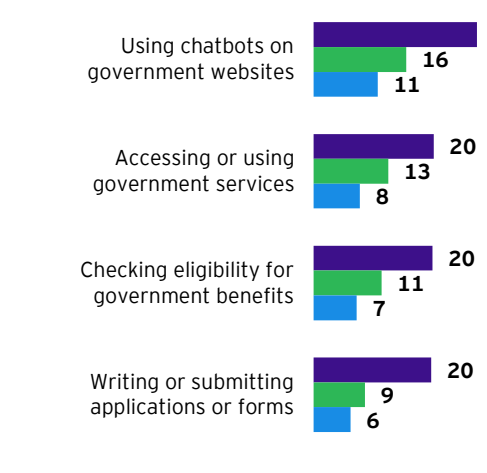
When it comes to government services, individuals are primarily using AI chatbots on government websites. This includes utilizing AI for checking their eligibility for government benefits and services, It also includes the use of AI for writing and submitting applications, suggesting individuals are increasingly turning to technology to simplify and expedite their interactions with government agencies.

How people have interacted with AI for health and wellbeing over the last 6 months (%)



Source: AI Sentiment Report, January 2025
Base: Those who have consciously interacted with AI for health and wellbeing over the last 6 months

How people have interacted with AI for government services over the last 6 months (%)



Source: AI Sentiment Report, January 2025
Base: Those who have consciously interacted with AI for government services over the last 6 months

Integration into financial activities

As AI continues to enhance the security and efficiency of financial transactions, it's important to also educate consumers on how they can take advantage of this.

When asked about their financial behaviours using AI, relatively few New Zealanders and Australians said they are primarily using AI for protecting personal information and monitoring finances for potential fraud or scams, despite this being a common use-case already implemented by financial service providers across both markets.

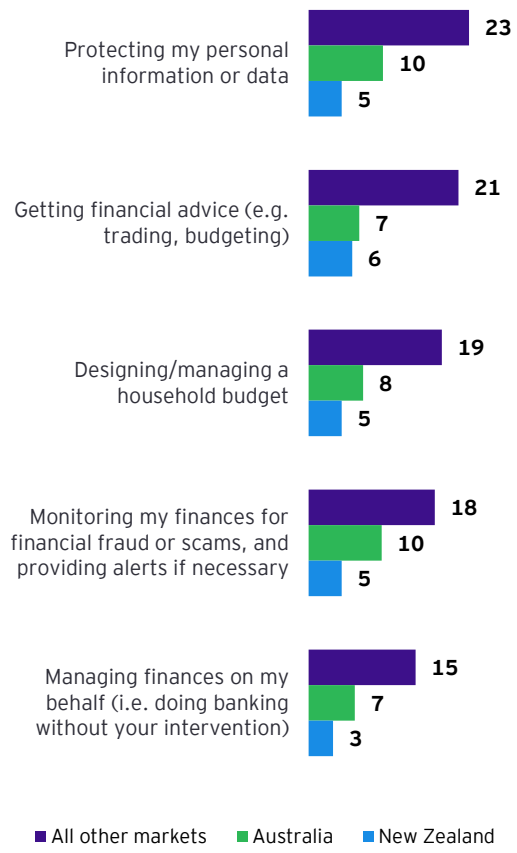
This highlights the importance of education and ensuring customers know the benefits they are already experiencing from the technology.

Opportunities to enhance financial literacy

Interestingly, AI is being used by some to obtain financial advice and managing household budgets reflects a proactive approach among individuals to leverage technology for better financial decision-making.

This trend suggests there may be ongoing opportunities for financial institutions to develop innovative AI-driven solutions that cater to the diverse financial capability of consumers, ultimately enhancing financial literacy and empowerment.

How people have consciously used AI for financial purposes over the last 6 months (%)



Source: AI Sentiment Report, January 2025
Base: Those who have consciously interacted with AI for financial purposes over the last 6 months

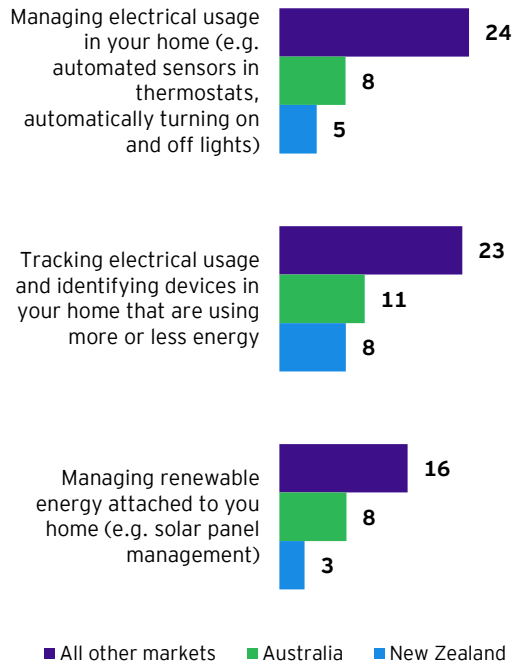
Integration into the energy landscape

AI is also being used for some for energy-related purposes, including monitoring and managing energy usage.

It is essential for stakeholders to consider how these technologies can be effectively integrated into existing energy systems while promoting energy efficiency and environmental responsibility.

Individuals are primarily using AI to manage electrical usage through automated systems, such as smart thermostats and lighting controls, reflecting a proactive approach to energy efficiency. Additionally, everyday people are also using AI for tracking electrical usage and identifying energy consumption patterns within their homes.

How people have consciously used AI for energy purposes over the last 6 months (%)



Source: AI Sentiment Report, January 2025
Base: Those who have consciously interacted with AI for energy purposes over the last 6 months

Section 4:

Comfort with future opportunities

4

Looking to the future of AI in New Zealand and Australia

Despite having a sentiment gap, people are looking forward to the future of AI and the opportunities it presents.

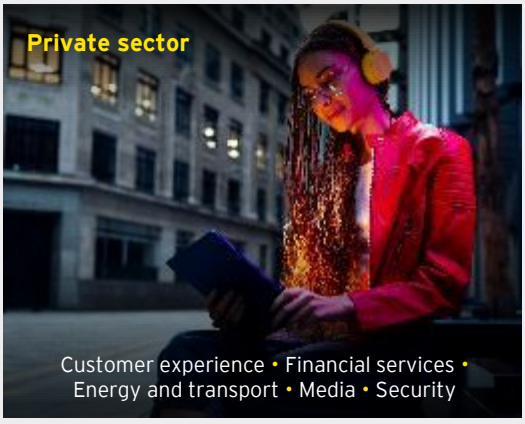
Although New Zealanders and Australians are less interested in AI than people in other markets, there is still optimism about it and the opportunities that exist. By harnessing the innovative potential of AI technology, many everyday people recognise the opportunity to help enrich their lives, create new opportunities, and addresses pressing societal challenges.

From a private sector lens, people are looking forward to a future where AI enhances their quality of life, making tasks easier and opening doors to new possibilities.

From a governmental perspective, people are optimistic that AI may help optimise healthcare delivery, enhance public safety, and streamline transportation systems, directly impacting the lives of everyday citizens.

These opportunities are explored in more detail over the coming pages.

Opportunities across government and the private sector:



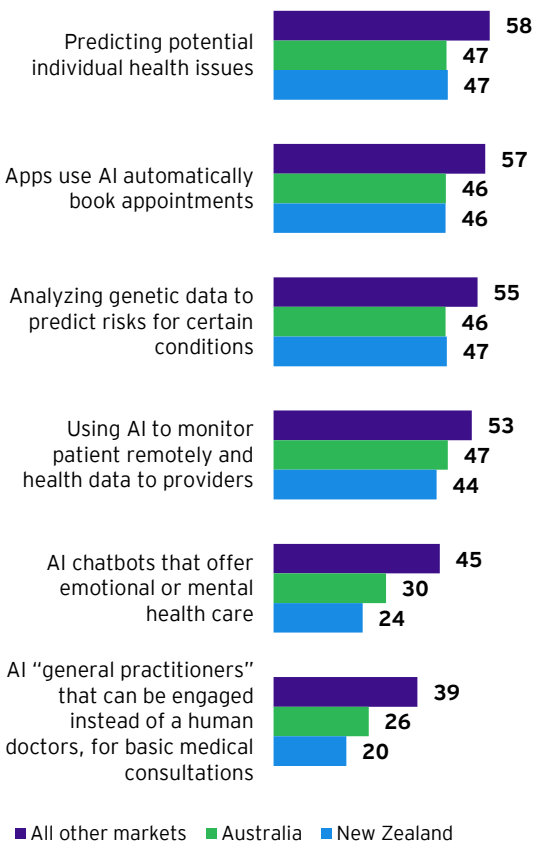
Comfort with AI being used by governments for different purposes

Across both market, a substantial proportion are comfortable with governments exploring the use of AI to support with healthcare and education.

Although comfort is lower than other global markets, there is still a substantial base of people who would be comfortable with governments exploring the use of AI to predict individual health issues, or automating aspects of teacher's workloads, etc.

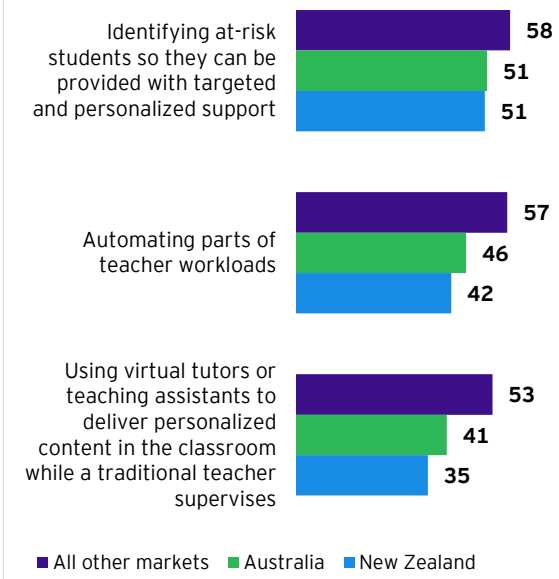
From an agentic point of view, a substantial group of people are also comfortable with the idea of using AI tutors and GPs for service delivery (under supervision).

Potential applications in healthcare
(% somewhat/extremely comfortable)



Source: AI Sentiment Report, January 2025
Base: All respondents, see appendix for detailed sampling

Potential applications in education
(% somewhat/extremely comfortable)



Source: AI Sentiment Report, January 2025
Base: All respondents, see appendix for detailed sampling

Safety will be critical.

Although people are comfortable with governments exploring AI applications in both education and healthcare, it's important to recognise the need for safety. People generally trust that governments will protect the privacy and physical/psychological safety of them and their loved ones.

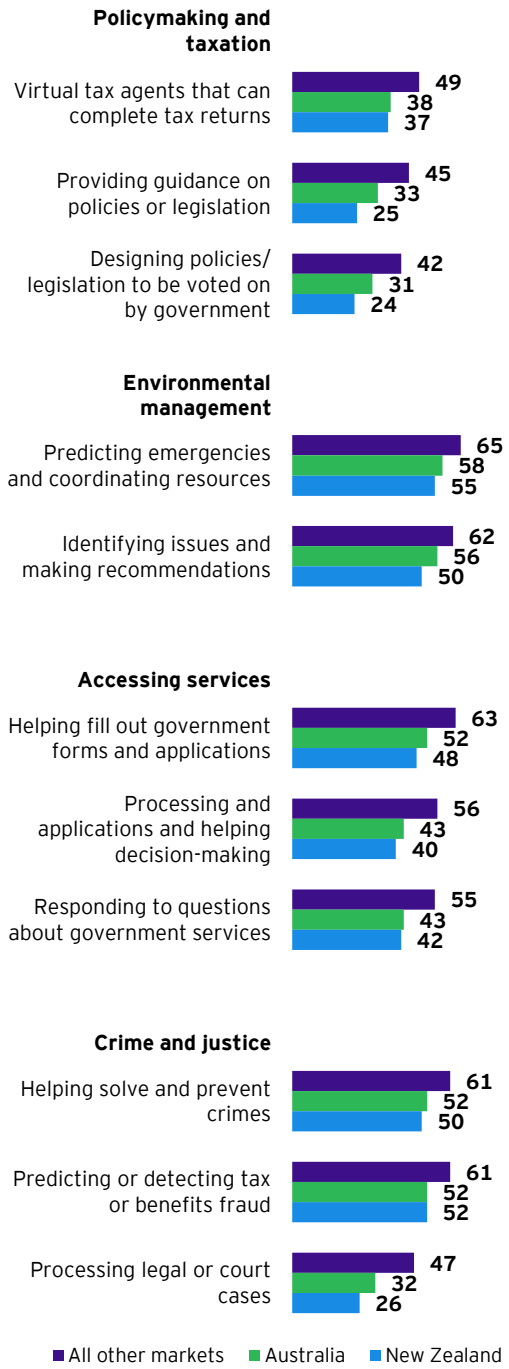
As such, any trial of AI for these purposes must be done under close human scrutiny and the process must be enthusiastically transparent so that individuals can determine its applicability in their day-to-day life and assure themselves there is no undue risk, either at the individual or community level.

For other areas of government, there is a nuanced landscape of public sentiment towards the use of AI for various applications, including policymaking and designing regulation.

While there is broad readiness to explore AI's capabilities in other areas of government, particularly in environmental management and service access, there is also a need for policymakers to thoroughly consider and address the public's concerns before widespread deployment of AI systems across government. Engaging with the public, ensuring transparency, and providing education about AI's benefits and limitations will be crucial throughout this process.

In the realm of policymaking and taxation, comfort levels are notably low. For instance, only 38% of Australians and 37% of New Zealanders express comfort with the idea of a virtual tax agent completing tax returns, which is the highest among the applications in this category. These figures decline further for providing guidance on potential policies (33% in Australia and 25% in New Zealand) and for writing or designing policies (31% in Australia and 24% in New Zealand). This indicates a clear hesitance among the public to allow AI to play a significant role in shaping legislation, reflecting concerns about accountability and the potential for bias in automated decision-making.

Potential applications across government
(% somewhat/extremely comfortable)



Source: AI Sentiment Report, January 2025
Base: All respondents, see appendix for detailed sampling

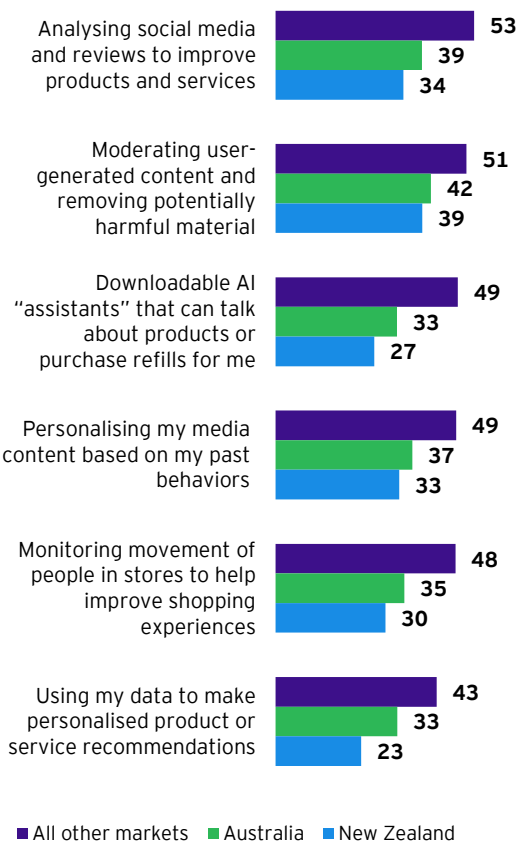
Comfort with AI being used by the private sector for different purposes

While some people are comfortable with AI being heavily integrated into their customer experiences, this needs to be done sensitively.

Support for AI being integrated into customer experiences is substantially higher in other markets than New Zealand and Australia. For example, approximately a quarter of New Zealand consumers and around a third of Australian consumers are comfortable with AI being used to analyse their personal data and make personalised product and service recommendations.

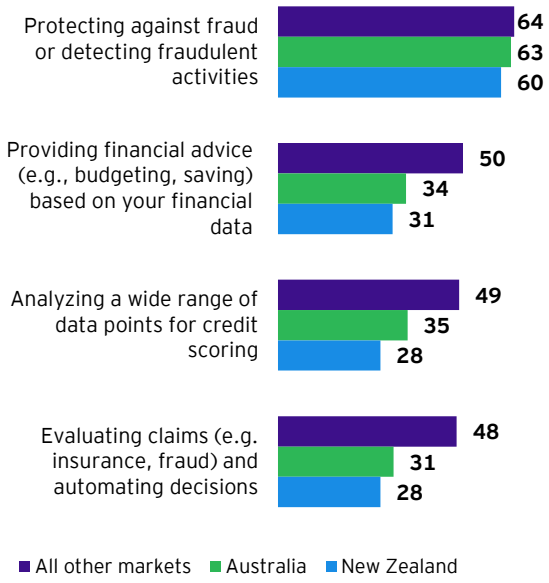
This reiterates the importance of creating trust in both markets, as this will dictate uptake and usage of AI for these types of purposes.

Potential applications in customer experience and media (% somewhat/extremely comfortable)



Source: AI Sentiment Report, January 2025
Base: All respondents, see appendix for detailed sampling

Potential applications in financial services and equity (% somewhat/extremely comfortable)



Source: AI Sentiment Report, January 2025
Base: All respondents, see appendix for detailed sampling

AI is welcome as a defensive tool in the financial services sector.

New Zealand and Australia are aligned with the rest of the world when it comes to the defensive opportunities of AI, with around 3 in 5 people saying they are comfortable with the technology being used by financial service institutions to protect against fraud or detect fraudulent activities.

In contrast, about half this number are comfortable with it being used to provide financial advice, analyse datapoints for credit scoring or evaluating claims – highlighting the concerns people currently have with AI being a part of their customer experiences.

As with the financial services sector, there is substantial interest in using AI for safety and security.

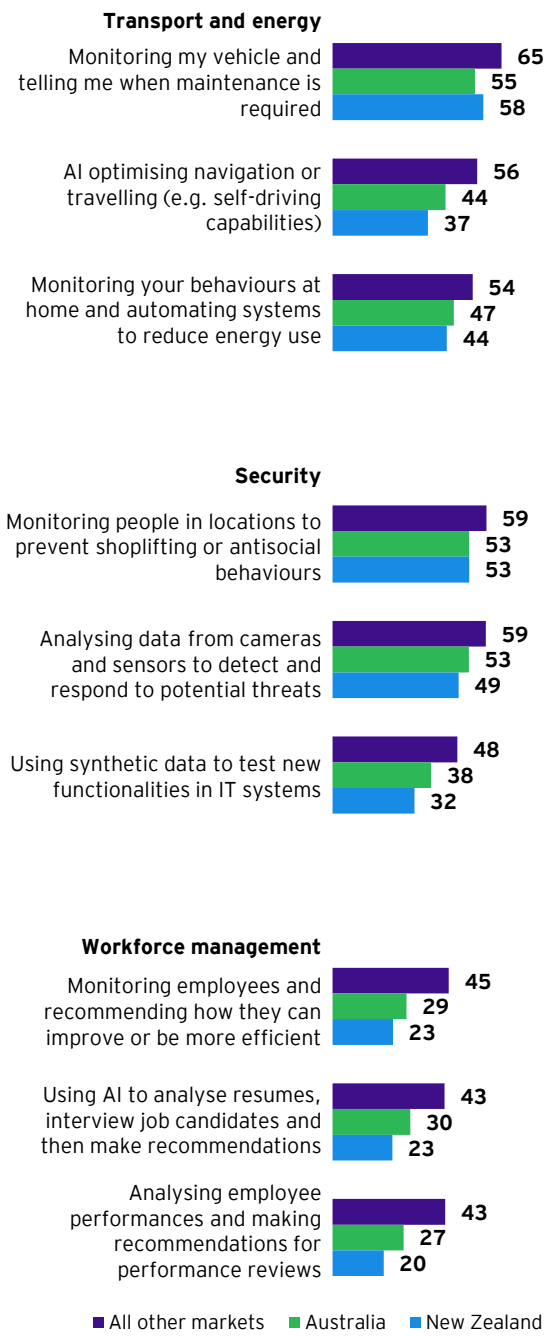
For example, more than half of people in both markets are comfortable with AI being used to monitor their personal vehicles and telling them when maintenance is required or scheduled. A similar proportion are comfortable with AI being used to monitor people in stores or locations to prevent shoplifting or antisocial behaviours or analysing data from cameras and sensors to respond to potential threats in a location.

Interestingly, there is some concern about companies using synthetic data to test new functionalities in IT systems. This may reflect poor understanding from the public about how this process is undertaken. Synthetic data is typically used to support humans when running these test, rather than being fully independent/automated – which may be a misconception among everyday people.

Workforce management is an area of concern particularly for New Zealanders.

People in both markets expressed substantial concern with AI being used to monitor employees, even if it is simply to make recommendations about improving efficiency.

Other potential applications
(% somewhat/extremely comfortable)



Source: AI Sentiment Report, January 2025
Base: All respondents, see appendix for detailed sampling

Appendix 1:

Meet the research team

Meet the research team

This research is made possible through the dedicated efforts of EY's professionals from around the world. By bringing a team of multidisciplinary professionals together, we can tell the stories of everyday people and guide possible solutions that will help promote AI as a good thing for all. Our core team members are shown below:

Program leadership

David Larocca
EY CEO & Regional Managing Partner, Oceania

Katherine Boiciuc
EY CTIO, Oceania

Erik Heller
EY customer insights lead, Oceania

Core research team

Chris Sherley
Lead researcher

AnnMarie Pino
Senior researcher

Catherine Price Ackers
Senior researcher

Jo Kirkhope
Senior researcher

Hannah How
Social research professional

Kosmo Karantonis
Social research professional

Appendix 2:

Detailed sampling

Detailed sampling (1/3)

Numbers of respondents for country and key demographic breakdowns.

Country	Self-reported gender		Generation				
	A man or male	A woman or female	Gen Z	Millennials	Gen X	Baby Boomers	Silent Generation
Total	**7,611**	**7,396**	**1,843**	**5,277**	**4,025**	**3,620**	**295**
Australia	497	525	85	354	252	300	36
Brazil	474	524	138	422	332	106	2
Canada	512	483	91	305	257	316	31
China	540	454	100	504	259	135	2
France	505	499	69	261	319	340	16
Germany	493	509	123	226	266	371	16
India	536	462	265	452	198	84	1
Japan	519	480	92	326	321	250	12
KSA	239	259	154	246	92	8	0
New Zealand	498	510	89	315	275	288	42
South Korea	574	425	124	360	336	173	8
Sweden	486	513	108	318	251	300	25
UAE	360	143	95	318	83	10	0
UK	509	490	89	294	270	318	32
USA	869	1,120	221	576	514	621	72

Country	Education level			Other relevant information		
	Degree	High School or equivalent	Did not finish high school	Have caring responsibilities	Are multilingual	Identify as neurodiverse
Total	**9,904**	**4,290**	**554**	**2,926**	**7,261**	**417**
Australia	706	261	48	186	229	38
Brazil	651	315	28	225	453	24
Canada	687	265	30	159	464	31
China	872	116	11	229	826	6
France	611	333	50	101	398	23
Germany	387	338	161	114	569	6
India	909	83	4	497	978	28
Japan	608	349	17	77	229	24
KSA	378	112	7	141	381	9
New Zealand	701	242	59	105	243	41
South Korea	777	211	6	184	370	4
Sweden	549	393	35	207	929	64
UAE	425	77	3	156	478	18
UK	590	369	24	145	262	34
USA	1,053	826	71	400	452	67

Detailed sampling (2/3)

Country	Working status					Nature of job role		
	Working full or part time	Student	Retired	Currently looking for work	Not employed and not looking for work	Professional roles	Labor and skilled trade roles	Service roles
Total	**10,250**	**542**	**2542**	**778**	**851**	**7,692**	**2,514**	**1,873**
Australia	684	18	219	37	61	548	158	143
Brazil	795	32	70	64	28	544	161	113
Canada	603	32	247	49	58	483	161	142
China	858	19	105	10	7	671	188	65
France	580	27	294	54	48	373	123	129
Germany	575	37	289	58	36	435	180	185
India	848	70	27	31	21	666	154	80
Japan	722	37	83	41	109	455	136	115
KSA	367	42	7	56	21	307	61	53
New Zealand	689	22	184	45	62	504	174	154
South Korea	744	55	65	56	79	630	152	80
Sweden	635	47	220	59	34	438	211	159
UAE	450	21	4	20	8	328	95	46
UK	636	20	221	31	88	568	144	109
USA	1,064	63	507	167	191	742	416	300

Country	Living situation						Living location		
	Living alone	Live with partner/ spouse	Live with children aged 17 or under	Live with children aged 18 or over	Live with parents or other adults cared for	Live with other adults (e.g. a houseshare)	City or large town	Suburbs or small town	Rural
Total	**2,597**	**9,074**	**5,162**	**1,726**	**2,419**	**1,021**	**8,421**	**4,902**	**1,737**
Australia	212	620	318	96	98	78	427	522	78
Brazil	80	615	482	129	179	49	796	181	23
Canada	188	579	257	104	100	119	550	342	108
China	70	817	575	104	207	10	926	62	12
France	185	668	310	127	59	29	382	328	295
Germany	289	559	206	70	54	39	434	342	226
India	20	676	530	135	502	72	798	140	62
Japan	198	543	216	147	252	59	432	524	45
KSA	23	316	291	47	153	45	449	42	9
New Zealand	163	646	293	115	79	112	395	487	127
South Korea	153	548	295	186	270	42	782	136	83
Sweden	289	530	290	96	42	29	524	336	142
UAE	30	345	283	53	133	46	434	62	10
UK	209	627	305	109	72	44	374	469	160
USA	488	985	511	208	219	248	718	929	357

Detailed sampling (3/3)

Numbers of respondents for country and the deliberate use of AI in different life scenarios in Section 3.

Country	Deliberate usage of AI across different life scenarios								
	Customer experience	Personal life	Education and learning	Professional life	Technology, media and telco	Health and wellbeing	Engaging with government	Financial behaviours	Energy
Total	**9,838**	**9,187**	**9,086**	**8,270**	**8,240**	**7,519**	**6,433**	**6,226**	**5,357**
Australia	593	425	469	385	425	381	309	251	204
Brazil	802	822	818	783	706	676	541	585	412
Canada	618	543	530	452	505	425	360	355	255
China	915	917	888	894	857	799	738	768	703
France	479	489	541	382	344	341	337	249	258
Germany	578	556	489	440	435	410	333	318	292
India	916	933	940	943	879	852	817	826	724
Japan	452	465	392	383	358	327	191	223	187
KSA	413	436	430	421	386	376	353	343	280
New Zealand	537	366	415	371	359	322	218	148	128
South Korea	766	774	680	654	696	567	522	482	435
Sweden	546	576	527	462	477	398	366	318	314
UAE	438	466	454	447	417	404	403	392	323
UK	550	381	432	360	408	374	281	250	270
USA	1,235	1,038	1081	893	988	867	664	718	572

Detailed sampling - Australia

Numbers of respondents for Australia in the October 2024 and January 2025 AI Sentiment surveys.

The methodology between the two waves was similar. In October 2024 a 15-minute quantitative survey was conducted online with an Australian general population sample of n=1,016 Australians on the topic of AI. A subset of n=100 Australian respondents were asked to complete a 5-minute chat session with a trained AI research agent. These people were sourced from the main quantitative survey. In January 2025 however, the Australians who completed the AI research agent chat session were sourced separately from the main quantitative study.

Sample profile - Australia	
Wave	Total Sample
October 2024	1,016
January 2025	1,027

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