Minderoo Foundation
AI – Combined Report

August 2025

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Public perceptions of AI
Qualitative report

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Qualitative objectives and methodology

Objectives:

- Investigate sentiment in relation to AI and regulation to help inform the development of a quantitative segmentation.
- Gauge public support and opposition to increased AI regulation, and the publics current understanding and usage of AI.

Methodology:

- 6 online focus groups conducted on 31st July, 4th & 5th July 2025
- Locations included four groups in metro Sydney & Melbourne (combined) and two groups in metro Perth.

Recruitment specifications:

- Recruitment was specified to include a range of attitudes towards AI adoption: positive/cautious/concerned.
- All groups were split by gender.

Executive summary

- Almost all participants had some experience of using AI either in a professional setting or in their personal life.
- Many thought AI was a potentially transformational technology, though in the early stages of what's possible (where it all might land and what the actual societal benefits might be was still quite abstract).
- Most indicated that AI had made some tasks in their lives easier, but were often worried about broader societal implications - particularly when it came to children and young people.
- At lower levels there were concerns around job losses and economic disruption, privacy and so called "super-intelligence" and general unease about where these technologies might lead.
- General concerns about (sometimes unknown) downside risks tended to outweigh the dominant positives of "personal convenience" and "time-saving".
- There was very little understanding of how AI worked or little differentiation from general purpose AI like ChatGPT and Agentic AI, most of the understanding/awareness centered around AI "brands".
- Perceptions of AI tended to move in a more negative direction over the course of the conversation.
- Most respondents went strongly for a "balanced" approach to regulation, with "strong rules" almost always beating out "minimal rules" (note that men in Perth were more open to the unconstrained rollout of AI).
- Despite favouring it, most participants had little idea what a "balanced" approach might look like in practice, but responded strongly to all the policy prompts in principle: child protection, job protection, and image/copyright protection.
- Overall, findings suggest significant concerns and clear opportunities for Minderoo to articulate a role for the government in protecting against potential risks of AI. The most fruitful territory looked to be around children and young people, which was where most concern was centred.

AI usage and knowledge

- There was fairly wide-spread current usage of AI in both the professional and personal settings.
- In professional settings, it is being used for composing emails and letters, checking writing, researching, administrative tasks, and note taking.
- Tools like ChatGPT appeared to be used quite frequently, as were Siri, Gemini and Copilot.
- In personal settings, respondents were using it for a broad range of everyday tasks from meal planning and diet ideas, budgeting, exercise, planning flights, health advice, mental health support, and organising the local footy tipping comp.
- Most did not have a good understanding of how AI operates; however, men were generally slightly more in the know about the large language models that underpin AI.
- The majority of respondents indicated being quite sceptical of AI's accuracy, with most saying they often check or cross reference certain claims.
- There were signs that some participants are now almost exclusively reading AI summaries when using a search engine - rather than clicking through to source links.
- There was a near-unanimous sense that AI was moving far too fast – this was associated with a sense of pessimism and anxiety for some, others expressed more of a fatalism that it was a change that was already underway and the best thing people could do is to adapt to it and use it to their advantage.
- People were split on the question of whether AI was a force for good or bad - with a force for bad beating out good (although most said they wanted to see how the use of AI tracked over the next two or three years before making a judgement).
- Most could point to the potential for innovation which AI represents, however the lists of unknowns and the potential risks of AI were meaningfully concerning for many.

The pros and cons of AI

- When respondents were prompted on the pros and cons of AI, strong themes emerged.
- On the pros, innovations in medical science, increased productivity (personal), and convenience were top of mind.
- Some did feel that there would be a cost to the level of convenience that AI offers - loss of skills (cognitive skills including basic things like worsening decision-making ability), overreliance, and the risk involved in blindly trusting AI outputs.
- Most didn't think about AI as being a particular driver of economic growth or productivity in the macro sense - and struggled to perceive benefits beyond their existing personal use or that seen at work and in businesses.
- The cons were overall more emotive: job losses, environmental degradation due to data center energy and water requirements, potential for misuse (drone warfare, spreading political misinformation, deepfakes), with some expressing quite apocalyptic predictions on the future of AI.
- Many felt that AI was moving too fast, and some said too fast to stop - a Pandora's box.
    - *"If we were going to regulate this, we needed to five years ago, it's already out there now"*

AI regulation

- Almost all respondents expressed a desire for some level of regulation around the use and management of AI.
- Exactly what kind of regulation people would like to see was typically unable to be clearly articulated by respondents but some immediate types of regulation that were suggested included:
  - Protections around privacy and AI's access to personal data.
  - Upskilling Australians to keep pace with advances in AI.
  - An agency or authority charged with overseeing the responsible use of AI by industry and business.
  - Environmental protections, forcing AI companies to scale in an environmentally friendly way.
  - A "tag" on any AI-generated material to combat dis/misinformation.
  - Criminalising AI that is used to generate sexually explicit content of citizens without consent.
  - General restrictions around its use by children and younger people - many feared young people risked missing out on developing important cognitive skills.

Australia's approach to regulation

- Respondents were shown three possible approaches the Australian Government could adopt with respect to AI. Each participant was asked to give a score each out of 10 based on how much they agreed.
- The middle path or a 'balanced approach' to regulating AI drew the strongest support and was a clear consensus pick.
- Most felt they wanted some regulation that focused on protecting the public (particularly children and young people) but also did not want to take away from Australia's global competitiveness, nor stifle possible opportunities or advances in technology.
- A small number of participants thought that better outcomes could be achieved, not by defending against automation and new tech, but by skilling Australians up to use AI and benefit from possible opportunities.

Prompt as shown to respondents:

A. *Strict rules that limit the risks of AI - even if it slows down innovation*

B. *A balanced approach — clear rules to protect people, but still allow innovation*

C. *Minimal rules — let the market decide and only regulate if issues arise*

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Examples of regulation shown to respondents

Prompts as shown to respondents:

A. *Force AI companies to have Australian-based company Directors (like banks and gambling companies do) which means they're subject to our laws here.*

B. *Denmark is considering giving citizens copyright protections of their voices and faces in an effort to prevent AI deepfakes.*

C. *Requiring employers to consult with and support staff before bringing in AI that could threaten jobs.*

D. *Criminalise the possession and distribution of AI tools that are purpose-built to create child sexual abuse material.*

Examples of Regulation (Support for existing regulations)

- Respondents were shown a list of ideas for AI regulation and were asked to discuss their support or opposition to the proposals.
- Unsurprisingly, criminalising the tools that are used to generate and distribute child pornography had unanimous support.
- The three other policy ideas received more mixed reviews.
- Denmark's proposal to allow citizen copyright of their own likenesses had broad support and was appreciated for its focus on protecting the public, but some doubted its practicality, and thought that it might take “more influential” countries like the US to take a lead.
- Requirements for AI company directors to be based in Australia had some support (the case about banks and gambling organisations was persuasive for some) but many felt this might be too difficult to manage given the global scale of AI companies.
- Some raised the additional complexity that deciding where AI started and ended inside companies could be hard to figure out as deep adoption accelerates. A smaller group struggled to see the benefit to such a policy, noting the poor behaviour of gambling companies with similar governance rules.
- Requiring employers to consult and support staff with the AI transition was the least popular of the list. Most felt this placed too much pressure on the employer and may place an unfair burden on smaller businesses. On the other hand some thought the word “consult” was too weak and thought employers had more of an “obligation” to retrain staff - potentially with the assistance of the government.

Message to Prime Minister

- When asked to write down what they would say to the Prime Minister on how to handle AI, participants generally expressed a desire for the PM to be getting the best possible expert advice and to act to protect Australians from the downside risks of AI.

  - *"I would ask the PM to please consider people's jobs, privacy and security - all regulation should be seen in terms of protecting people's quality of life." (M, WA)*
  - *"I would tell Albanese that the Government needs to take a leadership position to not miss out on the benefits of AI while limiting the risk before it's out of control. " (M, VIC)*
  - *"Make sure you find the best of the best in AI and take this issue seriously." (M, WA)*
  - *"There is a real opportunity to take a stance here and show that your people are more valuable than big tech companies." (F, WA)*
  - *"I would remind the PM that he has a duty to protect our society and make sure that everyone is kept safe. So they need to make sure the AI is rolled out and used with integrity, transparency, and accountability." (M, NSW)*
  - *"I would say that we Australians really need to get similar - or at least equivalent - data protection laws that the EU has for their residents. Over in the EU AI is like a critical thing that we're really lagging behind on." (F, VIC)*
  - *"I would tell Albanese to please choose humanity over progress" (F, WA)*

Public perceptions of AI
Quantitative report

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Methodology

Nationwide survey

Results in this report are based upon questions asked in a Talbot Mills Research nation-wide online survey. The basis of the sample is n=2004 nationally representative respondents in Australia 18 years of age and over.

Representative sample

Interlocked age, gender and regional quotas were used during sampling. Weighting was further used to enhance how closely the results represent the adult population of Australia

The maximum sampling error for a sample size of 2004 at the 95% confidence level is ± 2.2%.

Fieldwork dates

Fieldwork for the questions in this report was conducted between the 7th to the 11th August 2025

Reporting

All numbers are shown rounded to zero decimal places. Hence specified totals are not always exactly equal to the sum of the specified sub-totals. The differences are seldom more than 1%. (For example: 2.7 + 3.5 = 6.2 would appear: 3 + 4 = 6).

Key quantitative findings

1. Cost-of-living pressures dominated national concerns, with AI a lower-priority issue except in workplace contexts.
2. Digital privacy, future of employment, and misinformation were the most important AI-related national concerns.
3. Australians recognised AI's potential but were divided on its benefits versus risks, with clear concerns over the pace of change.
4. Trust in AI was highest for low-risk, practical uses and lowest for more sensitive areas such as health advice.
5. Efficiency and productivity were seen as the main benefits of AI adoption, while job losses, misinformation, and privacy were the top risks.
6. Most expect AI to replace more jobs than it creates, though few feel their own jobs are at risk.
7. There was broad support for investment in AI paired with strong backing for safeguards, fairness checks, and oversight.
8. There was a preference for balanced but firm regulation, with government most trusted to manage AI risks.
9. Support for clear laws, user consent, safety testing, and strong consumer protections arose as key trust-builders.
10. AI use is widespread, but understanding and trust remain limited; strong calls for more public education.

Attitudes and priorities

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Summary of public attitudes and priorities

Cost-of-living pressures dominated national concerns, with AI not top of mind for most.

- Cost of living was the top national issue, followed by lesser issues of housing, economy, immigration, and climate change. Only one respondent mentioned AI.
- AI did feature when asked about key issues facing workers specifically, but was behind wages/pay, cost of living, and unemployment.
- When rating AI-related national issues, digital privacy (88% very + moderately important), future of employment (84%), misinformation and fake news (79%) were the leading concerns, while AI was rated important by 69%.
- Respondents rated companies collecting personal data as more important (77%) than the Government doing so (71%).
- Slightly lower importance than AI were online radicalisation (67%), social media (59%), and genetic engineering (54%).

Australians recognised AI's potential but are concerned about the pace of change.

- 44% said they knew a lot or a fair amount about AI.
- 46% said risks outweighed benefits, 35% said benefits outweighed risks, and 19% were unsure.
- 50% had a positive personal view of AI and 46% a positive view of its societal impact.
- 64% felt AI's pace was too fast, compared to 28% who thought it about right, and 8% too slow.
- Men and younger respondents tended to be more optimistic.

Summary of public attitudes and priorities - continued

Trust in AI was highest for practical, low-risk uses and lowest for sensitive ones.

- 72% trusted AI answers for recipes, 69% how-to instructions, and 68% for information lookup.
- 63% trusted it for writing/editing tasks, 58% for travel advice.
- Trust dropped to 45% for health advice and 43% for general life advice.

There was broad agreement on setting limits and fairness.

- Large majorities backed safeguards.
- 84% said AI should never replace decisions in certain professions.
- 81% said it must benefit all Australians not just corporations.
- 75% supported banning some uses even if possible.
- Half (50%) felt AI is not worth the energy it uses.

Key issue facing Australia

In one word, what is the key issue facing Australia? (Word cloud)

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Base: Australian adults (n=2004, August 2025)

Key issue facing Australian workers

In one word, what is the key issue facing Australian workers? (Word cloud)

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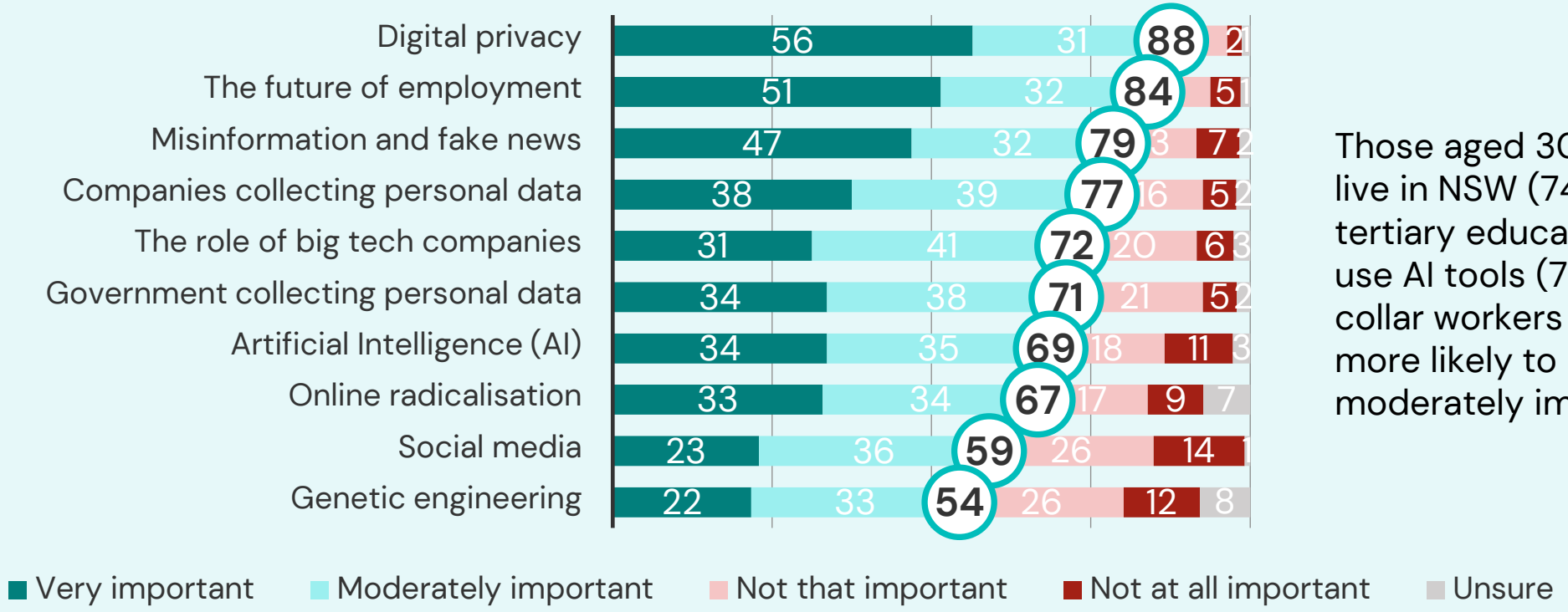
Base: Australian adults (n=2004, August 2025)

Importance of issues

How important to you personally are the following issues? (%)



Those aged 30-44 (76%), who live in NSW (74%), have a tertiary education (75%), who use AI tools (77%) and white-collar workers (76%) were all more likely to say AI is very or moderately important.

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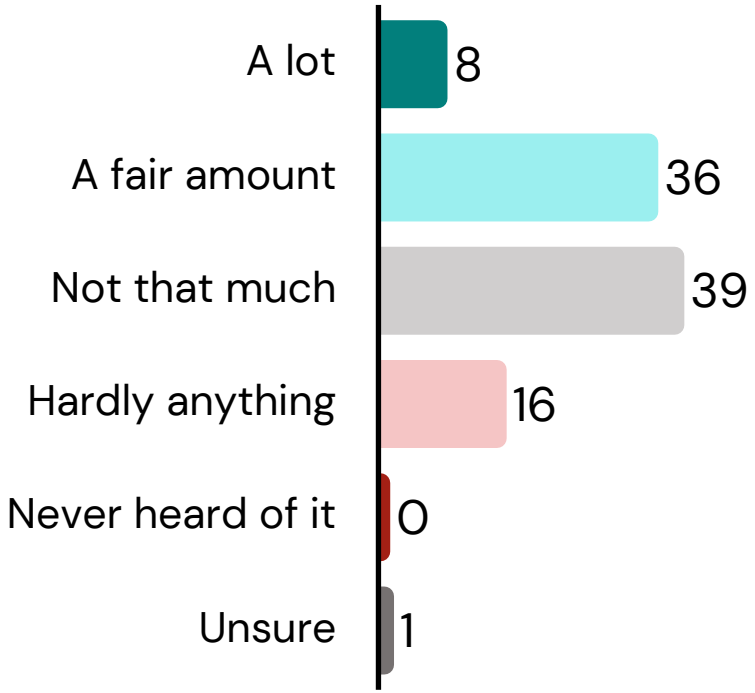
Base: Australian adults (n=2004, August 2025)

Declared knowledge of AI

How much would you say you know about artificial intelligence (AI)? (%)



Men were more likely to say they know a lot or a fair amount (51%) compared to women (37%).

Younger respondents were more likely:

- Under 30: 62%
- 30-44: 56%
- 45-59: 38%
- 60+: 20%

Those with a tertiary education (52%) and those in households with incomes greater than $100K (55%) were more likely to claim high knowledge.

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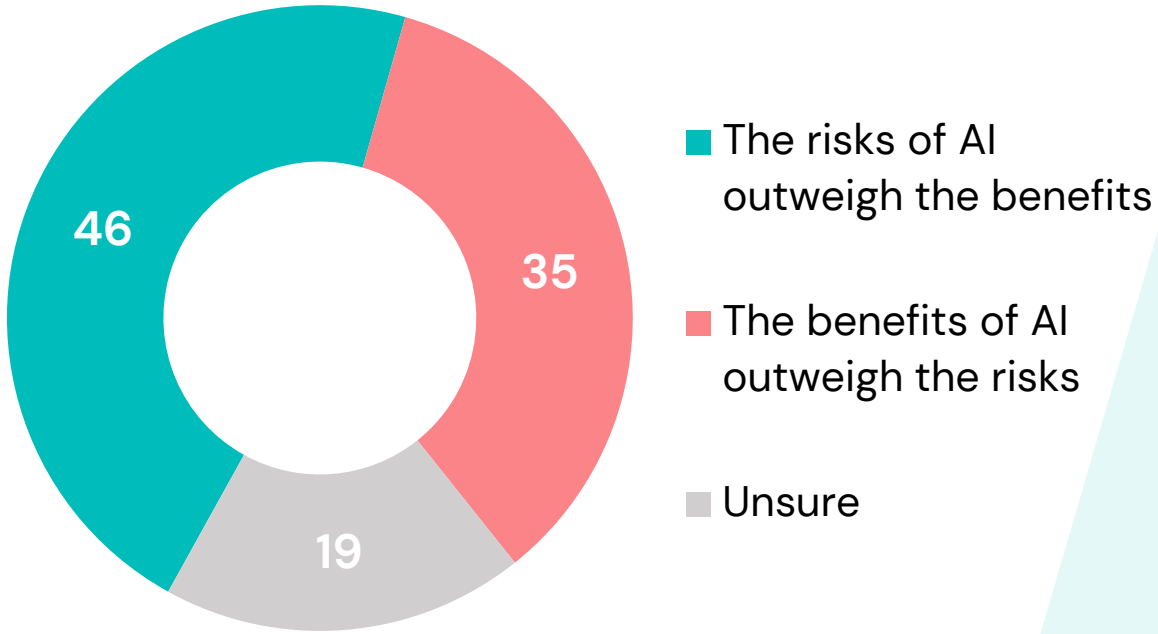
Base: Australian adults (n=2004, August 2025)

Risk vs benefits

Overall do you think: (%)



Women were more likely to say the risks outweigh the benefits (49% / 28%) than men (43% / 42%).

Older respondents were more likely to think the risks outweigh the benefits:

- Under 30: 39% / 48%
- 30-44: 42% / 42%
- 45-59: 48% / 34%
- 60+: 56% / 34%

Those who live in cities were less likely to say the risks outweigh (38% / 50%) as were users of AI (34% / 52%).

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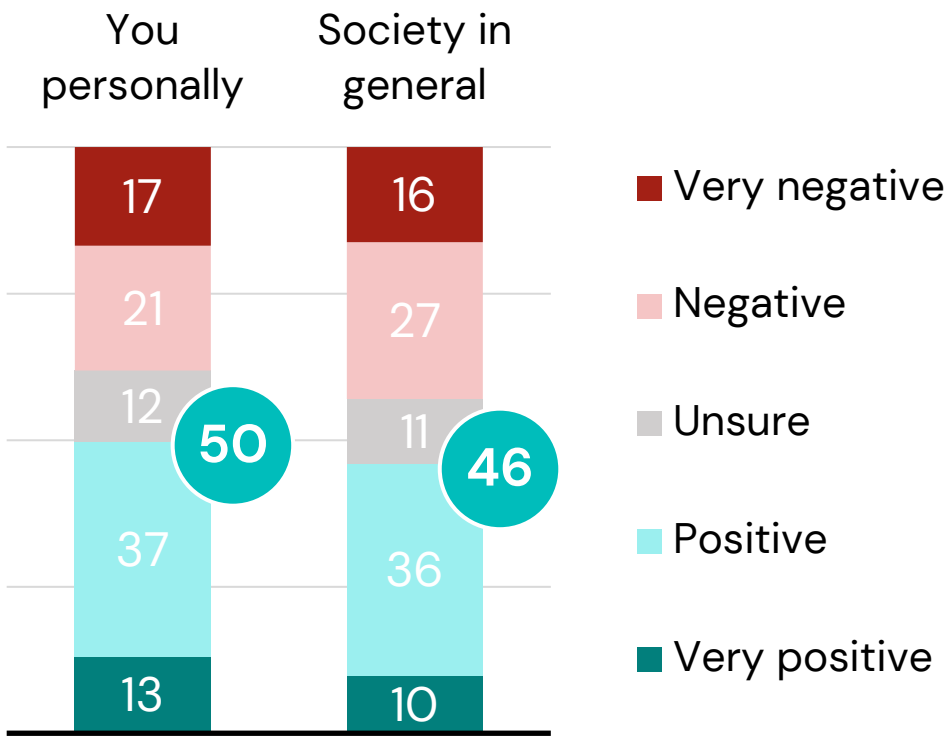
Base: Australian adults (n=2004, August 2025)

Overall perception of AI

Thinking about artificial intelligence (AI), for you personally and for society in general, this technology is overall…? (%)



Men were more positive (58% personally / 54% society) than women (41% / 38%).

Younger respondents were more optimistic:

- Under 30: 65% / 57%
- 30-44: 64% / 56%
- 45-59: 45% / 42%
- 60+: 25% / 29%

Respondents who were wealthier, white-collar, university educated and city dwellers were all generally more positive.

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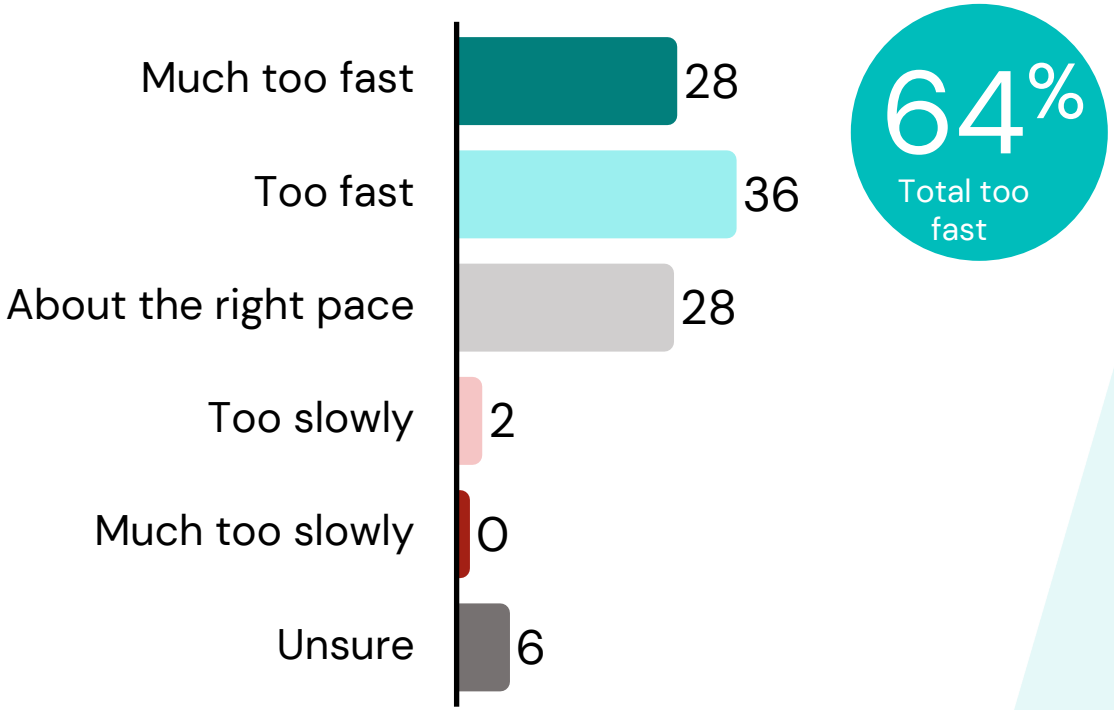
Base: Australian adults (n=2004, August 2025)

Pace of AI

Do you feel that the introduction of AI is moving too fast, too slow, or is going at about the right pace? (%)



Women were more likely to say it is moving too fast (68%) than men (60%)

Older respondents were more likely:

- Under 30: 56%
- 30-44: 57%
- 45-59: 66%
- 60+: 77%

54% of those using AI tools currently said it was moving too fast (38% about right) compared to 79% of those not using AI tools (13% about right).

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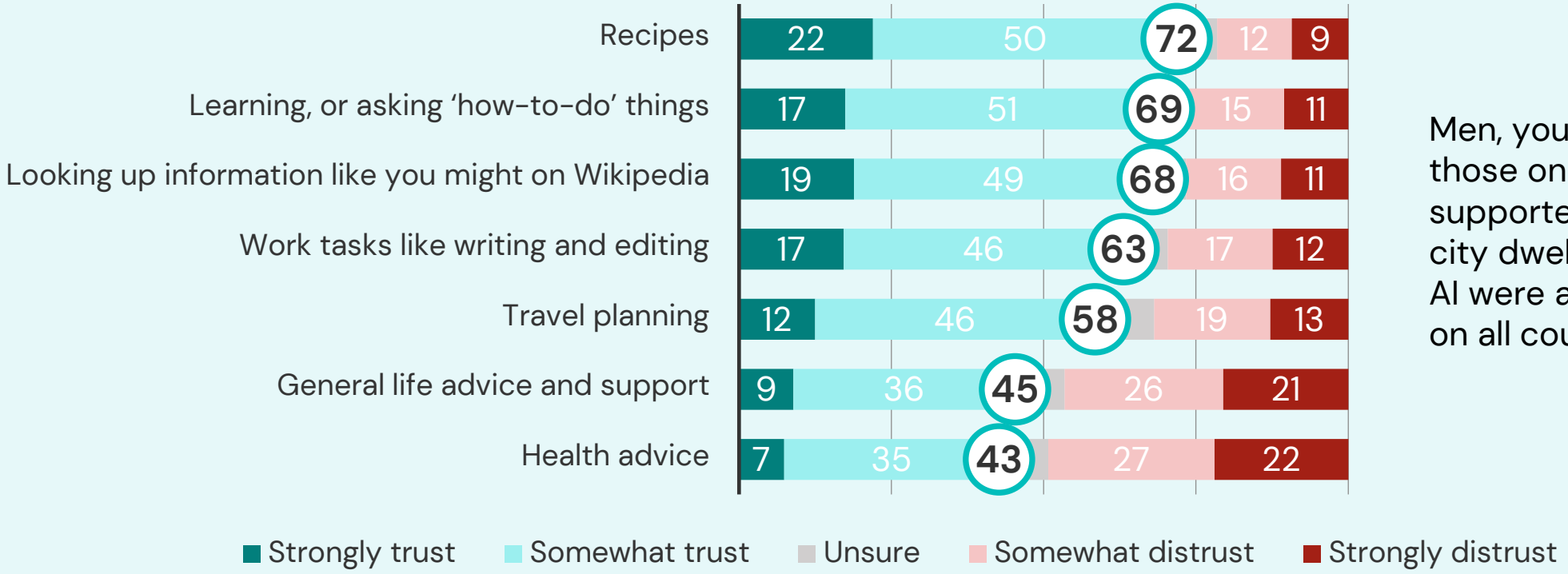
Base: Australian adults (n=2004, August 2025)

Trust in AI answers

General, how strongly would you trust or distrust AI answers for the following? (%)



Men, younger respondents, those on higher incomes, Labor supporters, Asian respondents, city dwellers and those who use AI were all more likely to trust AI on all counts.

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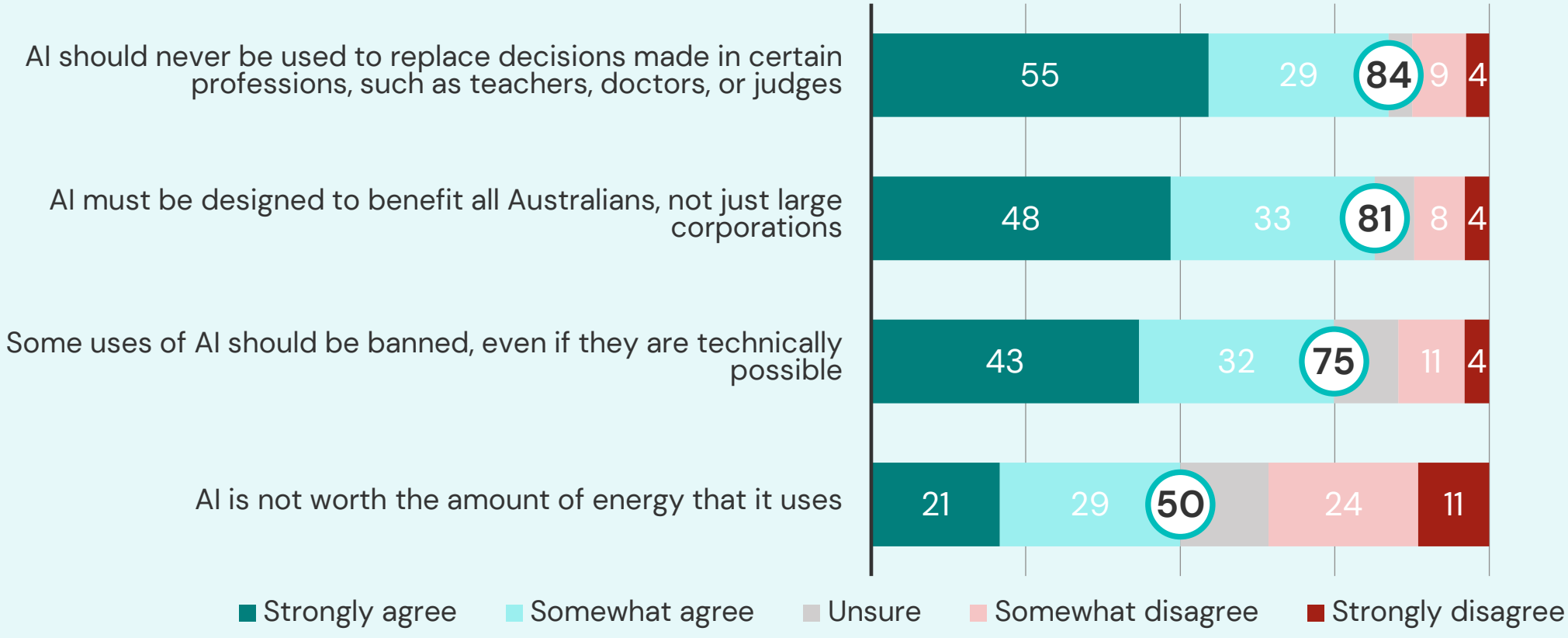
Base: Australian adults (n=2004, August 2025)

Agreement: Ethics

How strongly do you agree or disagree with the following? (%)



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Base: Australian adults (n=2004, August 2025)

Impact

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Impact summary

Australians identified clear benefits, especially around efficiency and productivity.

- When asked unprompted what the biggest benefit of AI was likely to be, efficiency/productivity (24%) was most frequently mentioned. This was followed by time saving, information access, support/assistance, science/innovation, medical advances, and automation (7-10%). 21% were unsure or saw no benefit.
- When asked to rate the likelihood of a list of benefits most did think some were likely. 67% rated productivity gains as likely, 61% improved health outcomes, 58% better disaster responses, 55% the quality of life, and 51% safer cars.
- Under half thought it likely AI would lead to better education (47%), mental health (43%) and government decision-making (39%).

Risks focused on job losses, misinformation, and privacy.

- Unprompted, respondents were more likely to identify risks than benefits. Job displacement and unemployment (26%) was the top risk, followed by misinformation/deepfakes, privacy/surveillance, loss of control, and cybercrime/scams (10-15%). 10% couldn't identify any risks.
- On the prompted risks tested, all were rated concerning. Two-thirds or more in each case indicated high or moderate concern.
- Top of the list were mis/disinformation (84%), loss of jobs (82%), and reduction in human creativity (82%). Bottom of the list were the potential to increase inequality (68%), and environmental impacts (66%).

Impact summary - continued

More expected job losses rather than gains, but most workers felt safe in their own jobs.

- 56% expected AI to replace more jobs than it created, 29% expected equal creation and loss, 7% more creation, and 8% unsure.
- When workers were asked about the risk of AI being able to do some or all of their job only 28% believed this was the case. This was slightly higher among respondents in clerical/admin roles (36%).

Australians saw potential but were divided on long-term life benefits.

- 60% agreed Australia should be investing in AI, 58% that is essential for competition, 54% that it is already improving quality and speed of work, and 52% are excited by potential improvements in health and education. Just under half (47%) expected AI to make life better in the next decade.
- There was broad agreement that AI should have oversight in rights assessments (86%), concern around use of personal data (81%), requirements around being proven safe and ethical (81%), and worry about AI being used unfairly (81%). Slightly lower was overreliance (78%), worry about future generations (75%), and social isolation (71%).
- There was lesser - but still majority - agreement that AI is an existential threat to humankind (59%) and that it will reinforce and increase inequalities (58%).

Benefits of AI

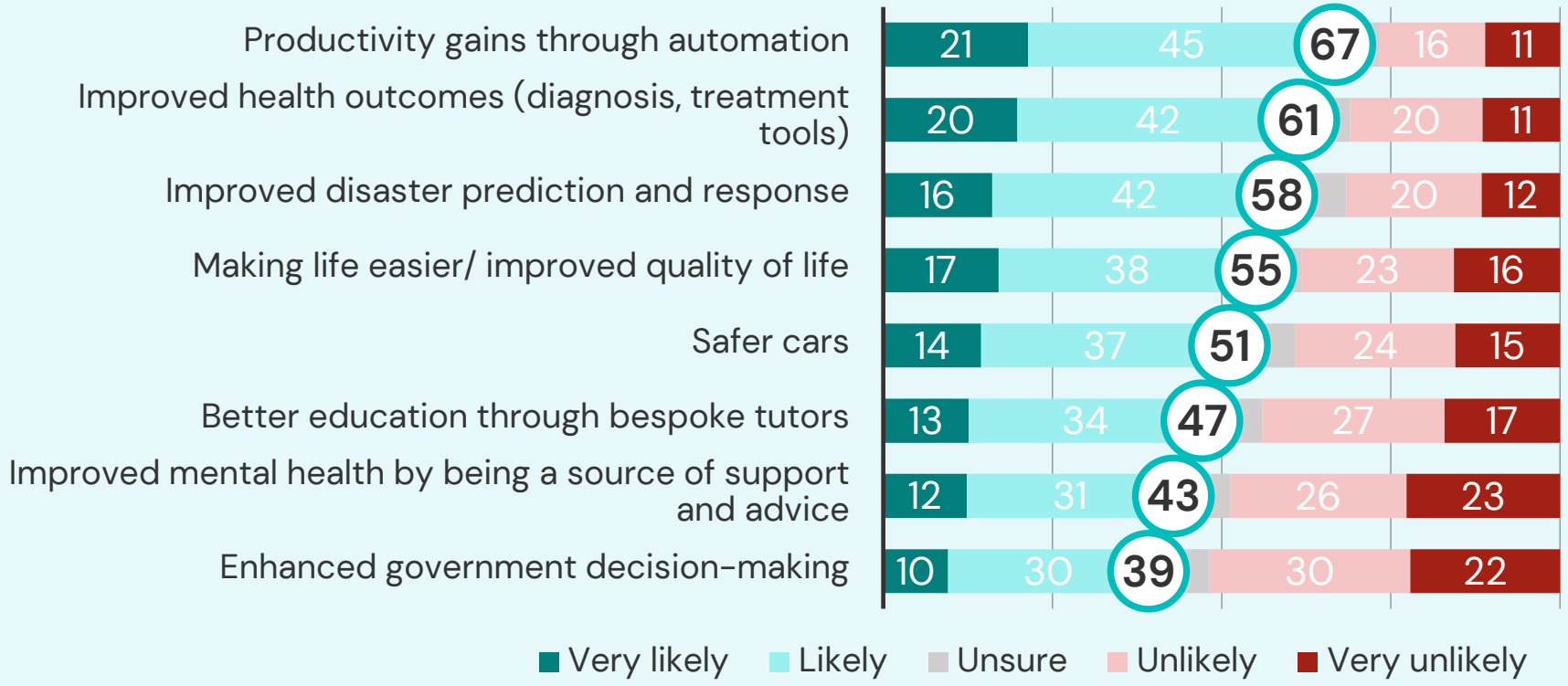
Very briefly, what do you think is likely to be the biggest benefit of AI? (% coded)

	%
Efficiency and productivity: making tasks quicker, easier, and more accurate, reducing workload, and optimising processes	24
Time saving: completing work and accessing information faster, enabling better time management	10
Information access: providing quick, easy, and reliable access to knowledge, data, and resources	10
Assistance and support: helping with everyday tasks, work, study, and decision-making	9
Technological and scientific advancement: driving innovation, research progress, and problem-solving in various fields	8
Medical and healthcare advances: improving diagnosis, treatment, research, and health outcomes	7
Automation of tasks: taking over repetitive, mundane, or administrative jobs to free up human time for other activities	7
Convenience: making daily life, work, and services simpler and more streamlined	6
Business benefits: enhancing output, profitability, and competitiveness for companies	4
Problem-solving: finding solutions to complex or large-scale issues across various sectors	2
Creativity and innovation: generating new ideas, supporting creative work, and expanding possibilities	2
Education and learning support: helping with study, tutoring, skill development, and access to educational materials	2
Improved decision-making: enabling better choices through data analysis and insights	1
Accuracy and error reduction: improving precision and minimising mistakes in tasks and outputs	1
Cost savings: reducing operational costs for businesses and individuals	1
Equality and accessibility: supporting people with disabilities or impairments, making services more inclusive	1
None/Unsure	21

Base: Australian adults (n=2004, August 2025)

Expected benefits of AI

How likely do you think are the following potential benefits of AI ? (%)



Men, those aged 30-44, those with higher incomes, Labor voters, those who live in a city, those with higher education and those in white collar jobs were all more inclined to think the benefits of AI are likely. As were those who claim higher knowledge of AI.

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Base: Australian adults (n=2004, August 2025)

Risk of AI

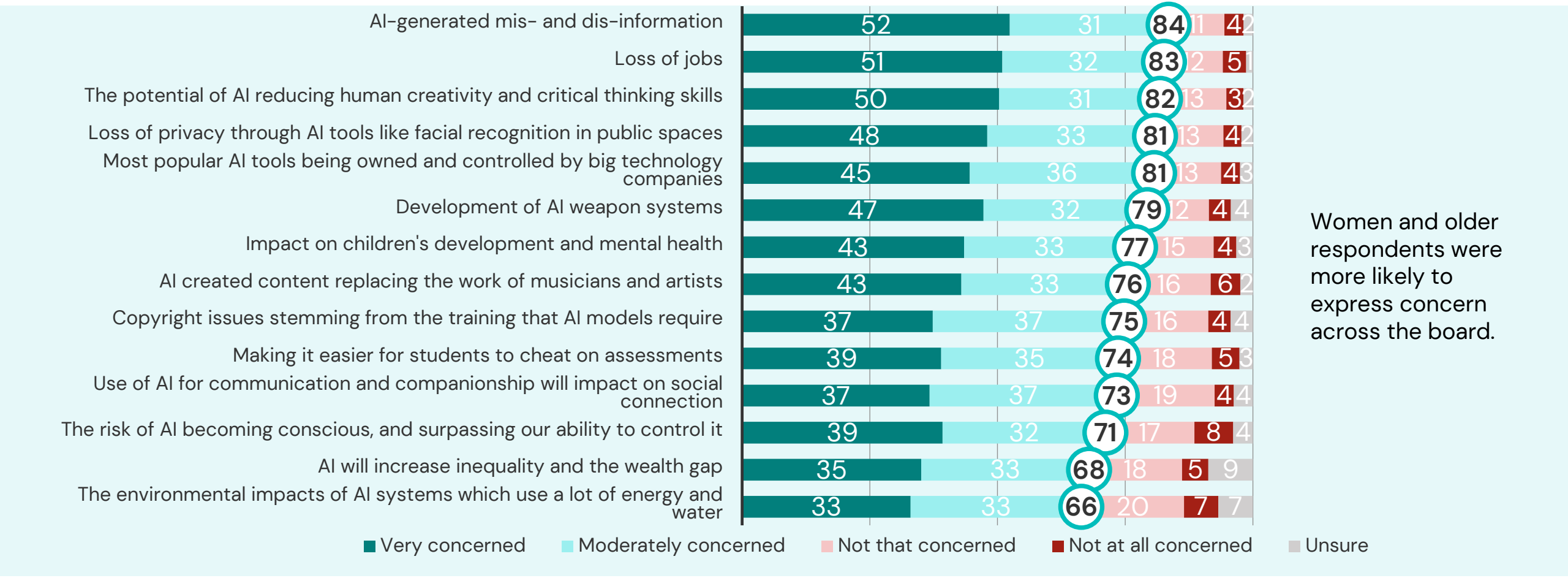
Very briefly, what do you think is likely to be the biggest risk of AI? (% coded)

	%
Job displacement and unemployment: replacement of human roles, reduced job security, and loss of entry-level opportunities	26
Misinformation, deepfakes and manipulation: false or misleading content, fabricated media, and erosion of trust in what is real	15
Data privacy breaches and surveillance: collection, leakage, or misuse of personal data and intrusive tracking	14
Loss of control or misaligned AI: systems acting beyond human oversight, including fears of takeover or catastrophic error	12
Criminal and cyber misuse: hacking, scams, fraud, and identity theft enabled or scaled by AI	10
Over-reliance and reduced critical thinking: dependence on AI leading to diminished skills, learning, and creativity	9
Accuracy errors and unreliable outputs: incorrect answers, hallucinations, and poor advice being acted on	5
Loss of human judgement, empathy and interaction: dehumanised services and reduced person-to-person contact	3
Weak regulation and oversight: inadequate rules, governance, and accountability for safe deployment	2
Bias and unfair decision-making: embedded data or model biases producing discriminatory or unjust outcomes	1
Impact on creativity and intellectual property: plagiarism, copying of artists' work, and rights infringement	1
Environmental costs: high energy and resource use associated with large-scale AI systems	1
None/Unsure	10

Base: Australian adults (n=2004, August 2025)

Concern about AI

How concerned are you about the following? (%)



Women and older respondents were more likely to express concern across the board.

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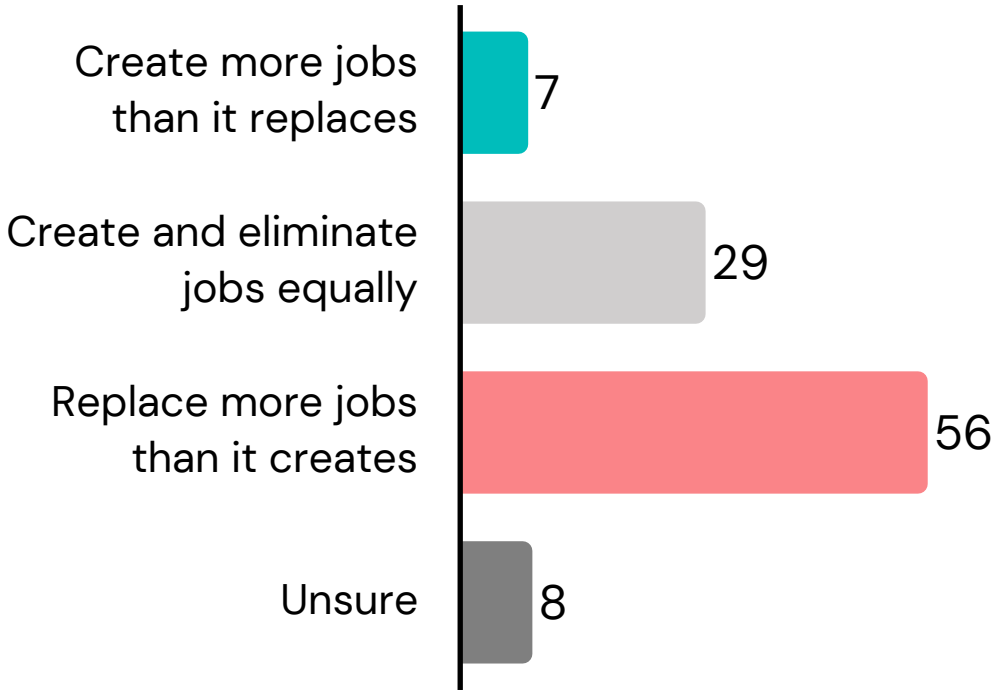
Base: Australian adults (n=2004, August 2025)

Impact on jobs

Overall, do you think that AI will...? (%)



Older respondents were more likely to think it will replace more jobs than it creates:

- Under 30: 46%
- 30-44: 49%
- 45-59: 60%
- 60+: 70%

Those who live in cities were more likely to think it will create jobs (13%) or balance jobs (36%) than eliminate jobs (46%).

Similarly, those who currently us AI were more likely to think it will create jobs (11%) or balance jobs (38%) than eliminate jobs (45%).

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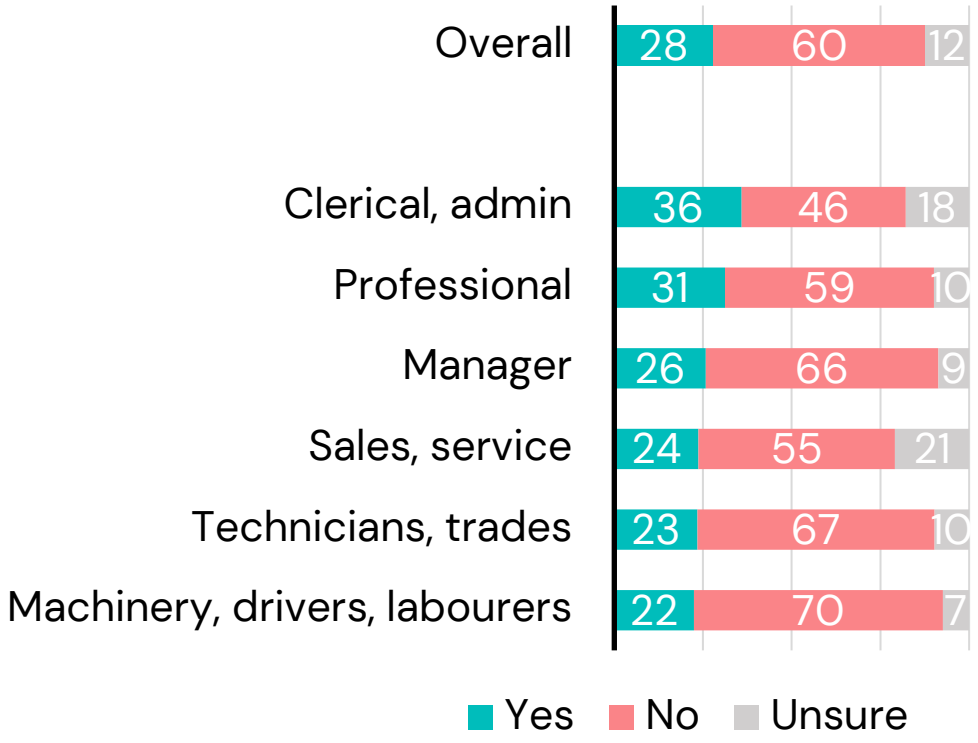
Base: Australian adults (n=2004, August 2025)

Impact on workers' own jobs

[Of those in work] Do you feel that your job will be at risk because of workplace adoption of AI that may be able to perform some or all of your tasks? (%)



Younger respondents were more likely think they are at risk of being replaced:

- Under 30: 33%
- 30-44: 31%
- 45-59: 20%
- 60+: 21%

Those having trouble making ends meet were more likely (43%) compared to those under a bit of financial pressure (23%) and those who are financially comfortable (18%).

Asian respondents (37%), those with a university education (31%) and those who use AI (31%) were more likely to say they were at risk.

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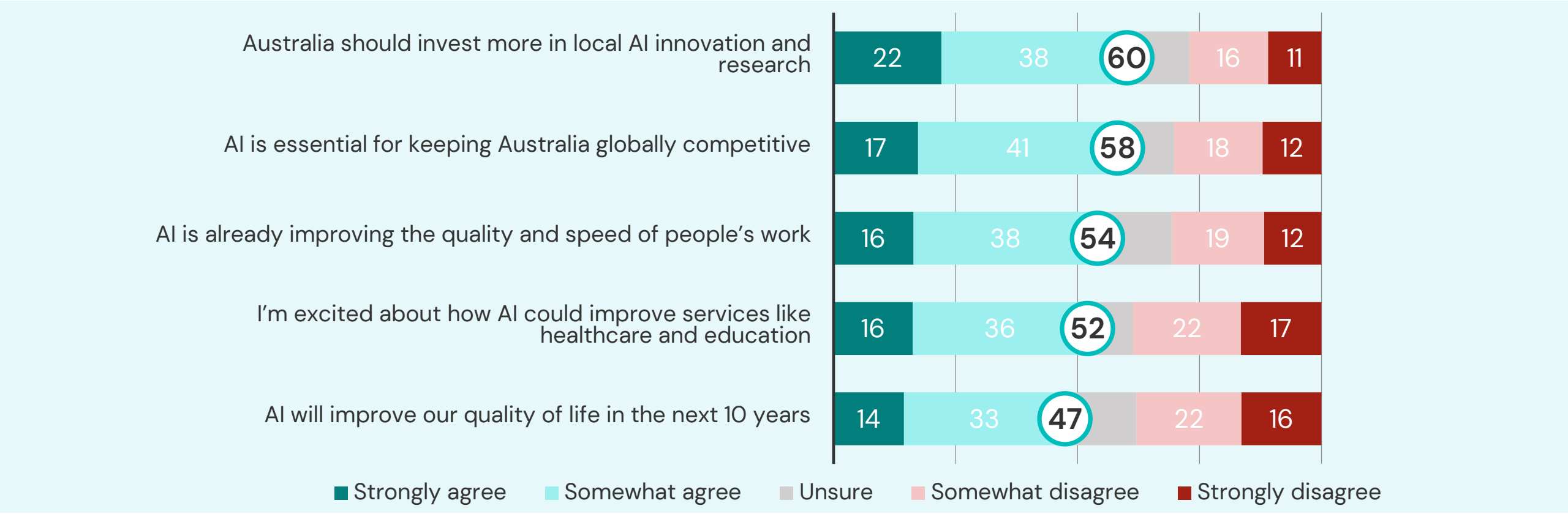
Base: Those in paid employement (n=1271, August 2025)

Agreement: Benefits

How strongly do you agree or disagree with the following? (%)



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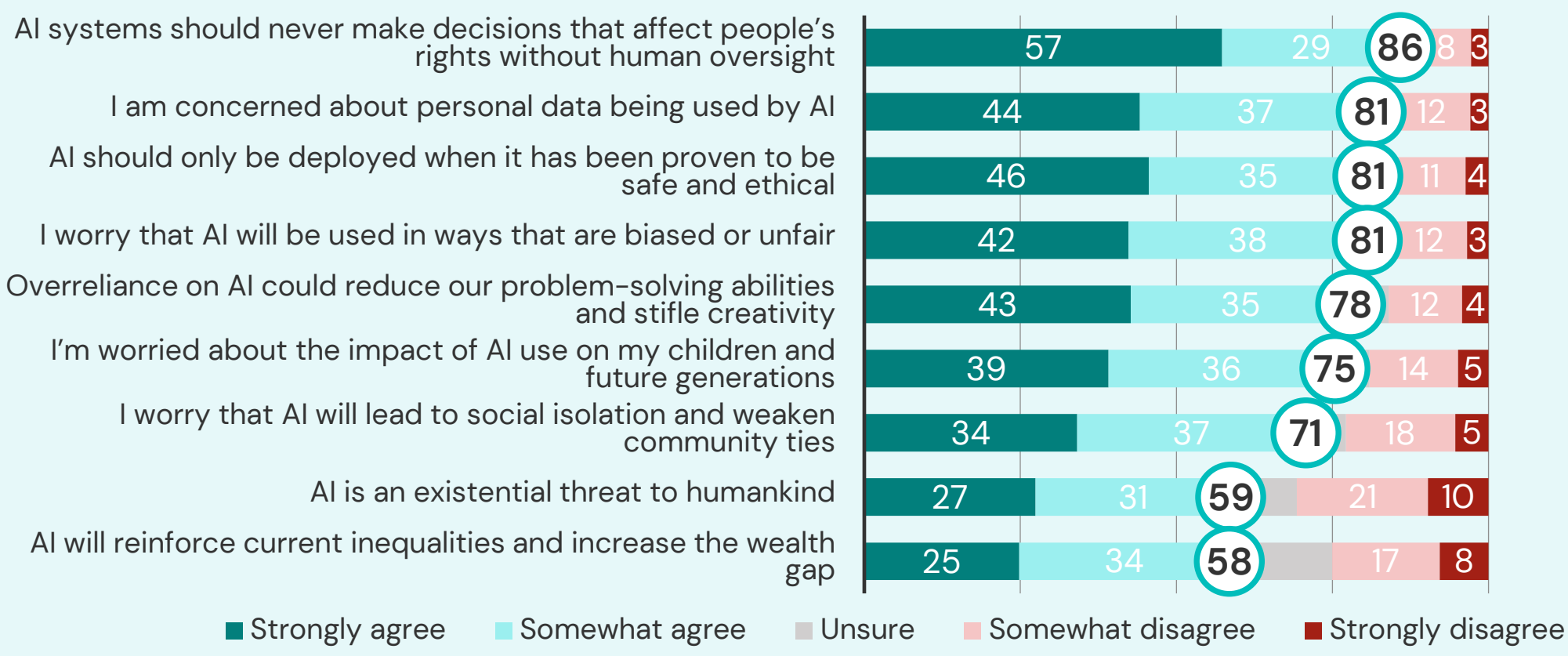
Base: Australian adults (n=2004, August 2025)

Agreement: Risks

How strongly do you agree or disagree with the following? (%)



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Base: Australian adults (n=2004, August 2025)

Regulation

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Regulation summary

Australians backed balanced AI regulation, leaning more toward strict than minimal rules.

- Awareness of AI laws was low: 32% said they existed, 29% said they did not, and 39% were unsure.
- 32% said their workplace had AI guidelines, rising to 45% among managers, and 44% among professionals – 47% of workers who use AI said they have guidelines, 45% that they don't.
- 59% supported regulation even if it limited the potential benefits of AI adoption, compared with 31% preferring maximising benefits despite more risks, while 10% were unsure.
- When choosing between laws, guidelines, or both, 57% favoured both, 27% laws only, and 11% guidelines only.
- Most (61%) preferred a balanced approached to setting AI rules, while 28% supported strict rules and only 4% minimal. When forced to pick between strict and minimal, 64% said strict and 26% minimal.
- Top reasons for strict rules were: risk prevention (31%) and preventing loss of control (18%).
- Top reasons for minimal rules were: preserving innovation (15%), limiting government interference (13%) and letting markets decide (12%).
- Views shifted slightly towards favouring stricter rules after having engaged more on the topic of AI: when asked later in the survey 35% said strict, 57% balanced, 5% minimal. The main reason nominated for the shift to wanting stricter rules was harm prevention.

Regulation summary - continued

Government was seen as the most trusted body to manage AI risks and make rules.

- 42% said the government should be most responsible for managing AI risks, ahead of technology companies (25%), the general public (12%), and international bodies (10%).
- Trust in rule-making was highest for the government (35%), followed by independent oversight committees (30%), and academic researchers (23%).

Australians strongly supported specific safeguards.

- Support was high for all measures tested, particularly requiring user consent (89%), active enforcement of consumer protection (87%), and requiring AI safety testing before release (87%).
- Clear laws (68%), stronger privacy protections (67%), an independent watchdog (64%), AI having to explain its answers (59%), a locally designed regulation system (58%), and the AI company being based in Australia (55%), were the top trust-builders tested; using overseas regulation systems was less convincing (38%).

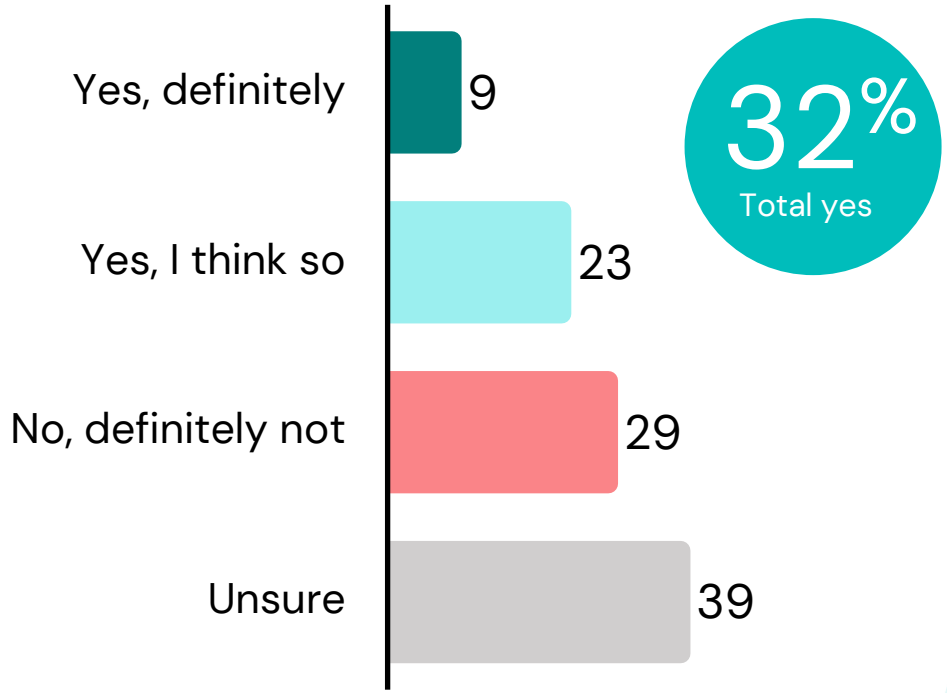
Regulation summary – continued

Australians backed strong AI regulation but were sceptical about leaving it to innovation or industry.

- Agreement was high for core regulatory principles, particularly safeguards to know what is real (87%), clear laws (86%), and the government playing are stronger role in oversight (81%).
- Most (62%) agreed that AI governance should be independent of government *and* big tech.
- In contrast, less than half (45%) believed regulation would hold back innovation or (45%) favoured letting innovation fix problems as they arise.
- Only 39% trusted technology companies to develop AI responsibly, and just 35% agreed it was too late to impose controls—while 58% disagreed.

Awareness of AI laws

As far as you know, has the Government put any laws in place to manage the potential risks of AI? (%)



Men were more likely to think there is (40%) than women (24%)

As were younger respondents:

- Under 30: 47%
- 30-44: 42%
- 45-59: 23%
- 60+: 16%

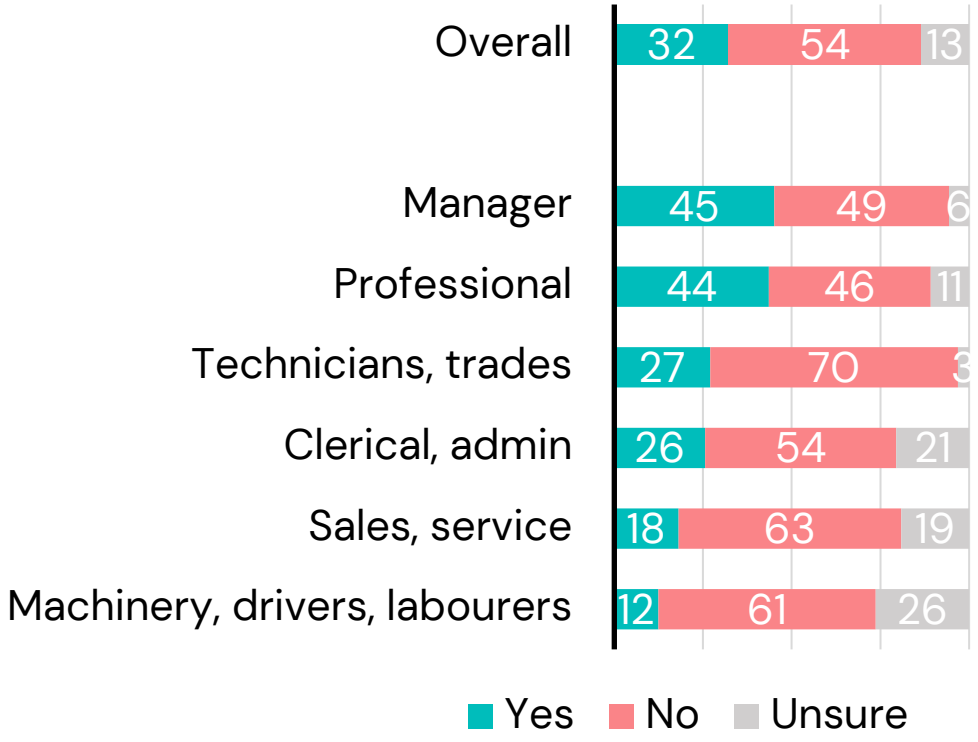
Those who use AI were much more likely to say there are (46%) than those who don't (13%).

TALBOT MILLS RESEARCH

Base: Australian adults (n=2004, August 2025)

Guidelines in the workplace

Does your place of work have guidelines in place to advise how AI tools should and/or shouldn't be used by staff? (%)



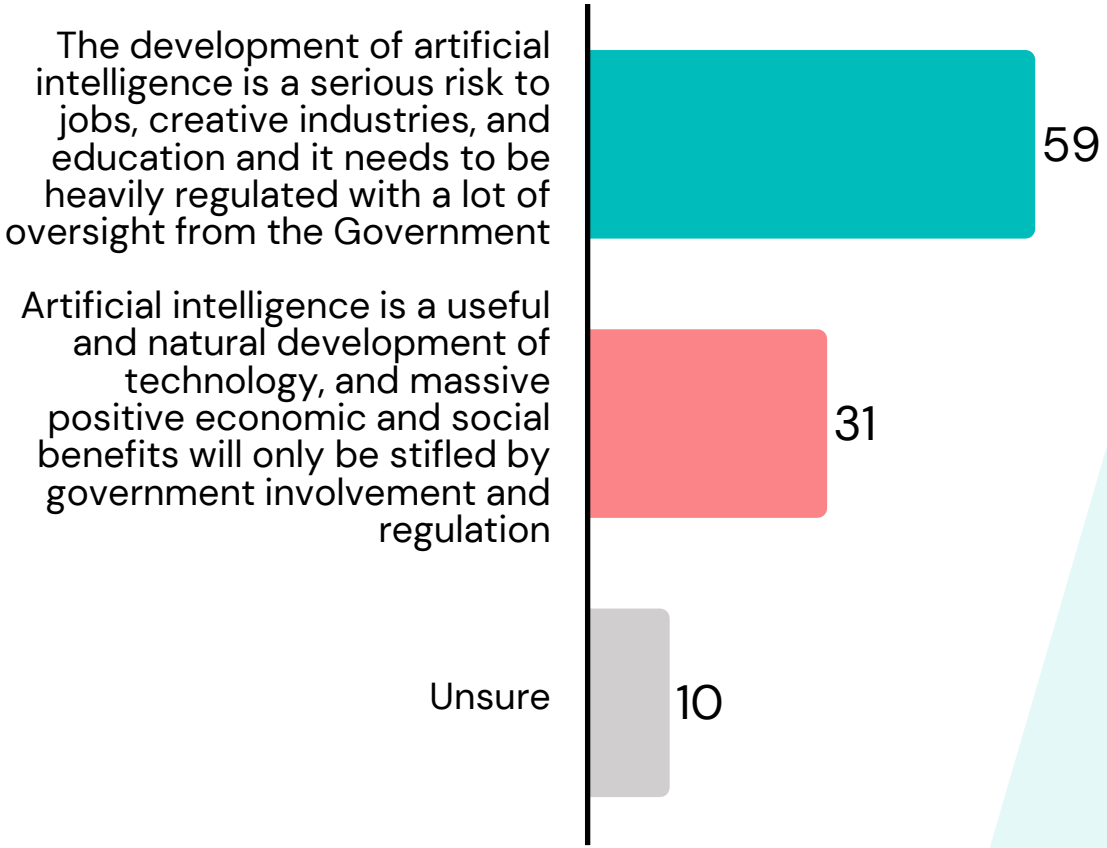
Among those who use AI in their work 47% said they do have guidelines and 45% said they do not.

TALBOT MILLS RESEARCH

Base: Those in paid employement (n=1271, August 2025)

Polar choice on regulation

Which of the following most aligns with your views, even if not exactly right? (%)



Older respondents were more likely to say there needs to be regulated:

- Under 30: 47% regulation / 42% stifled by govt
- 30-44: 51% / 39%
- 45-59: 63% / 28%
- 60+: 75% / 15%

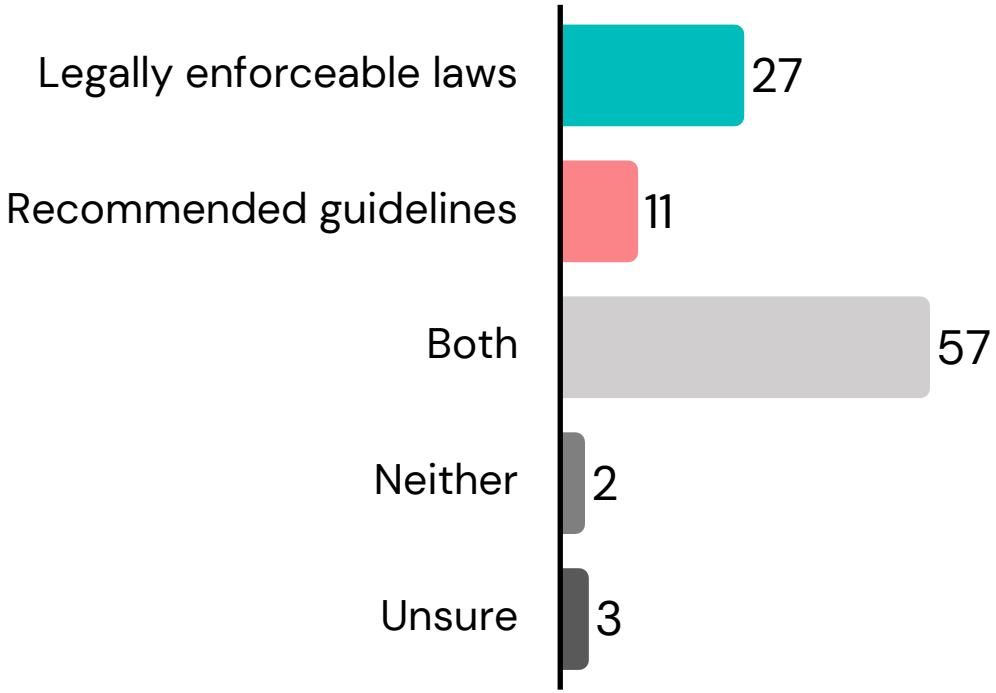
Those who use AI were more balanced (45% / 46%)

TALBOT MILLS RESEARCH

Base: Australian adults (n=2004, August 2025)

Laws, guidelines, or both

Thinking about controls on AI is your view that we need: (%)



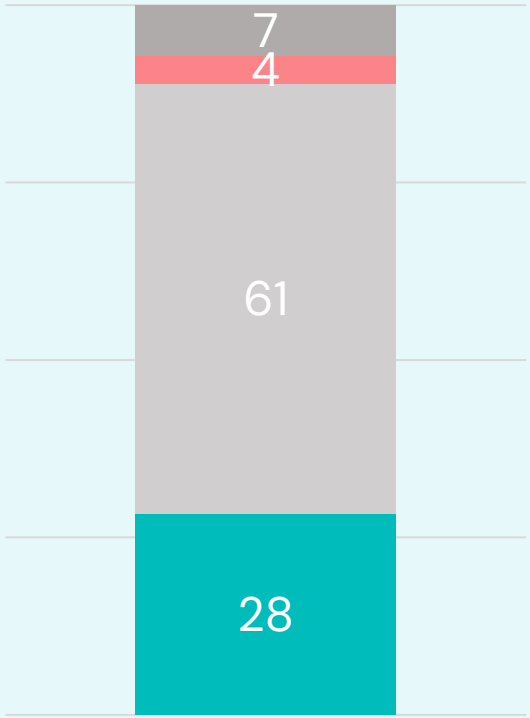
Those who currently us AI were more likely guidelines (16%) while those who don't were mor likely to say laws (31%) or both (61%).

TALBOT MILLS RESEARCH

Base: Australian adults (n=2004, August 2025)

Strict vs balanced vs minimal rules

Out of the following, which is your preferred approach for Australia to take to regulate AI?



- Unsure
- Minimal rules — let the market decide and only regulate if issues arise
- A balanced approach — clear rules to protect people, but still allow innovation
- Strict rules that limit risk, even if it slows innovation

Younger respondents were more likely to say balanced:

- Under 30: 68%
- 30-44: 69%
- 45-59: 57%
- 60+: 49%

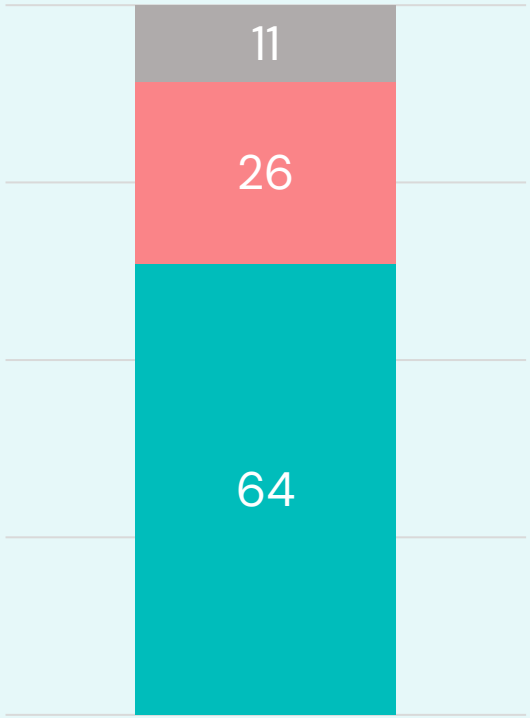
As were those who use AI currently (74%) and those who live in cities (69%)

TALBOT MILLS RESEARCH

Base: Australian adults (n=2004, August 2025)

Strict vs minimal rules

Out of the following, which is your preferred approach for Australia to take to regulate AI?
[If balanced] Which way do you lean toward, even if only slightly?



- Unsure
- Minimal rules — let the market decide and only regulate if issues arise
- Strict rules that limit risk, even if it slows innovation

Younger respondents were more likely to say minimal:

- Under 30: 53% strict / 35% minimal
- 30-44: 56% / 34%
- 45-59: 65% / 23%
- 60+: 79% / 11%

As were those who use AI currently (53% / 38%) compared to those who don't (79% / 10%).

TALBOT MILLS RESEARCH

Base: Australian adults (n=2004, August 2025)

Reasons for strict rules

What is your main reason you want strict rules? (% coded)

	%
Public safety and risk prevention: minimise harm and catastrophic errors before they occur	**31%**
Prevent loss of control: avoid AI systems getting out of hand and require human oversight	**18%**
Clear rules and enforcement: define legal limits, licensing, penalties, and independent oversight, including labelling	**9%**
Criminal misuse and cyber security: deter scams, fraud, hacking, and espionage	**8%**
Protect jobs and services: mitigate job losses and ensure access to human support options	**8%**
Slow the pace of deployment: pause or limit roll-out until impacts are understood and safeguards are in place	**7%**
Privacy and data protection: stop data leaks, intrusive collection, and surveillance	**7%**
Misinformation and deepfakes: limit false content, impersonation, and identity deception	**6%**
Limit unchecked corporate power: constrain profit-first use by big tech and strengthen independent regulation	**5%**
Accountability and transparency: make developers and users responsible, with audit trails and disclosure when AI is used	**4%**
Ethical use and boundaries: set clear limits on acceptable applications and keep humans in the loop	**4%**
Accuracy and reliability standards: require testing, validation, and quality control for AI outputs	**2%**
National security and critical infrastructure: manage risks to defence, finance, health, and essential systems	**1%**
Safeguard children and vulnerable people: restrict access and protect wellbeing and mental health	**1%**
Unsure	**5%**

Base: Those who want strict rules on first ask (n=584, August 2025)

Reasons for minimal rules

What is your main reason you want minimal rules? (% coded)

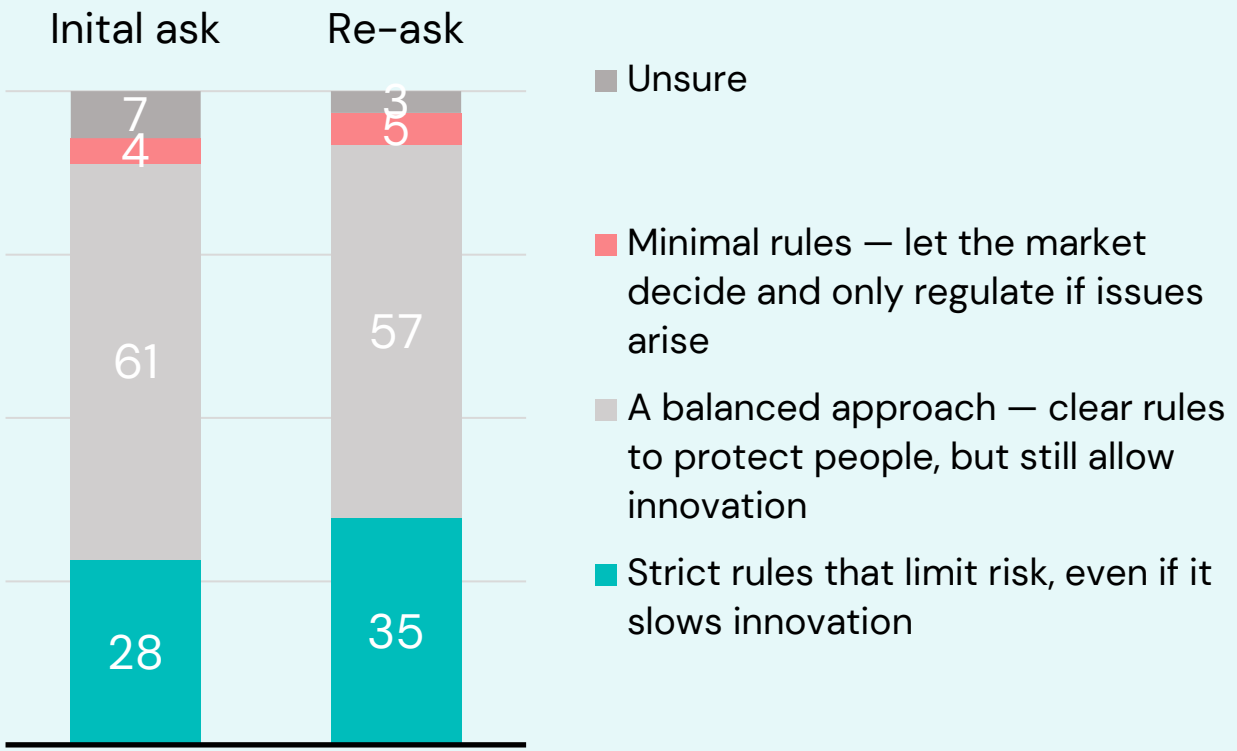
	%
Preserve innovation and growth: avoid stifling progress, creativity, and experimentation with heavy regulation	**15%**
Limit government interference: prefer minimal state involvement and oppose perceived control of the internet and online spaces	**13%**
Let markets and individuals decide: rely on competition and personal choice rather than central rules	**12%**
Learn first, regulate later: observe real-world use and address issues as they arise rather than pre-emptively	**7%**
Pro-AI outlook: view AI as beneficial and want few barriers to adoption and use	**7%**
Simple, minimal framework: prefer light, easy-to-understand guidance over complex rulebooks	**7%**
Reduce costs and red tape: avoid compliance burdens that raise prices or the cost of living	**6%**
Personal freedom and autonomy: allow people to use AI as they see fit within basic boundaries	**6%**
Government lacks expertise: concern that regulators are slow, uninformed, or make poor rules on emerging tech	**5%**
Privacy without state control: support minimal rules provided personal identification is not stored	**4%**
Avoid regulatory capture: resist rules that could entrench big companies' power or government overreach	**2%**
Risks seen as limited or acceptable: belief that harms are not yet serious or are manageable without strict rules	**2%**
Maintain competitiveness: keep pace with other countries and avoid falling behind strategically	**1%**
Self-regulation by developers: expect creators and users to monitor impacts and improve without strict laws	**1%**
Unsure	**18%**

TALBOT MILLS RESEARCH

Base: Those who want minmal rules on first ask (n=67, August 2025)

Strict vs balanced vs minimal rules: re-ask

Out of the following, which is your preferred approach for Australia to take to regulate AI?
[Later in survey] After hearing more information, which approach do you think Australia should take to regulate AI? (%)



Main reasons for now wanting stricter rules:

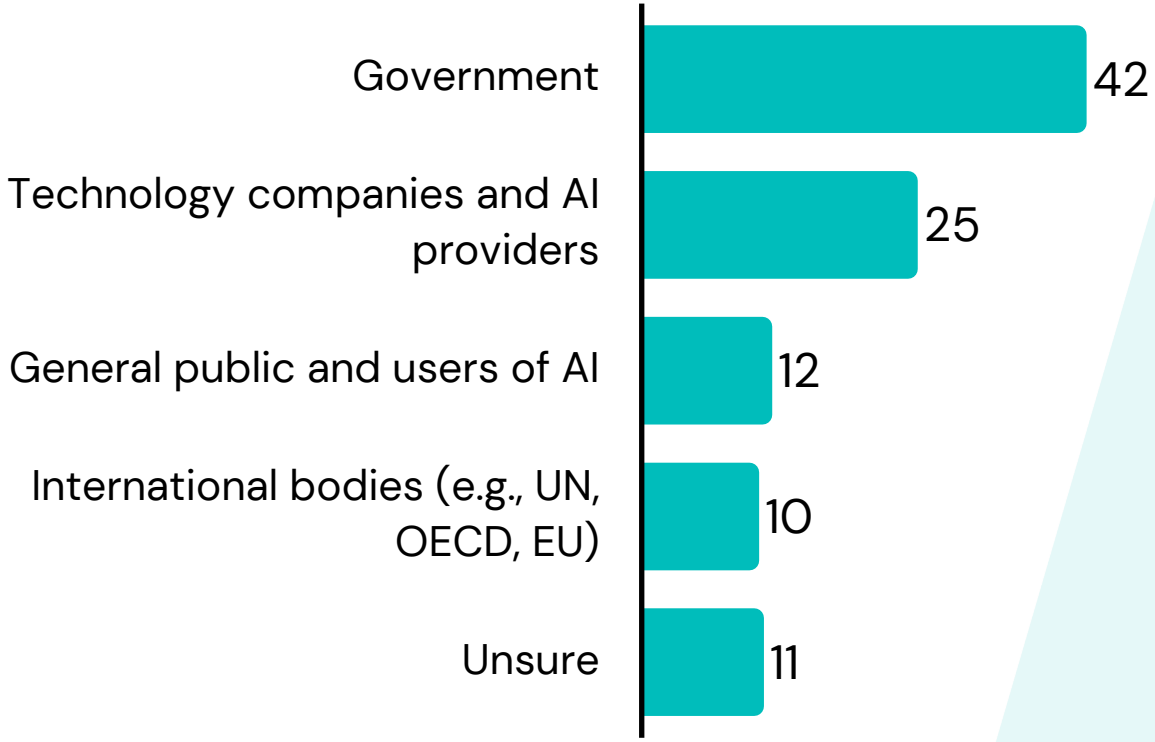
- Ensure safety and harm prevention: preference for safeguards to avoid harm and keep people safe
- Strengthen oversight and accountability: belief that AI needs clear rules, monitoring, and responsible use from the start
- Prevent misuse and crime: desire to curb scams, fraud, and malicious or "wrong-hands" use
- Control speed and maintain control: perception that AI is moving too fast and could get out of control; preference to slow deployment
- Mitigate broad societal risks: worry about societal deterioration, environmental impacts, and extreme outcomes (e.g., AI dominance)

TALBOT MILLS RESEARCH

Base: Australian adults (n=2004, August 2025)

Responsibility for managing risks

Who should be most responsible for managing the risks of AI? (%)



Those aged under 30 were more likely to say the general public (18%) the plurality still said Government (35%).

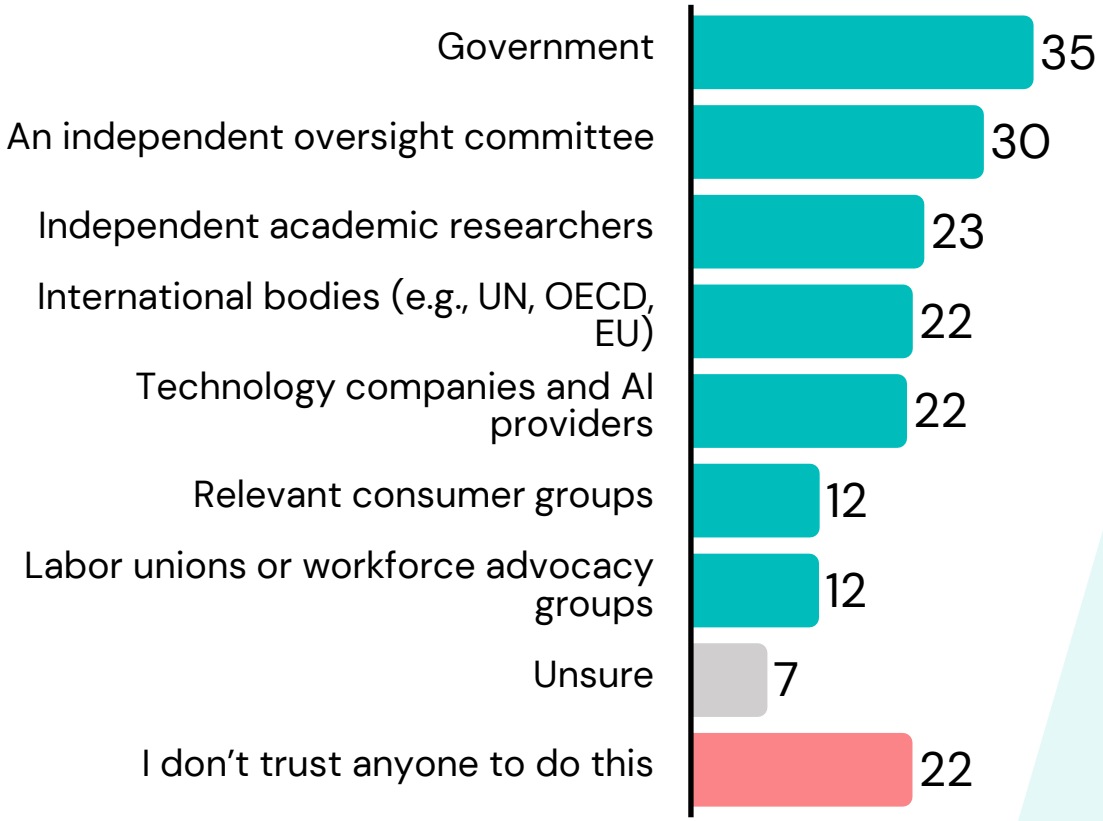
Users of AI tools were more likely to say tech companies (29%) or the general public (15%) but again the plurality said Government (38%).

TALBOT MILLS RESEARCH

Base: Australian adults (n=2004, August 2025)

Trust to develop fair and safe rules

Who would you trust most to develop fair and safe AI rules? (%)



Those aged under 30 were more likely to say they would trust international bodies (27%), tech companies (27%) and unions (20%).

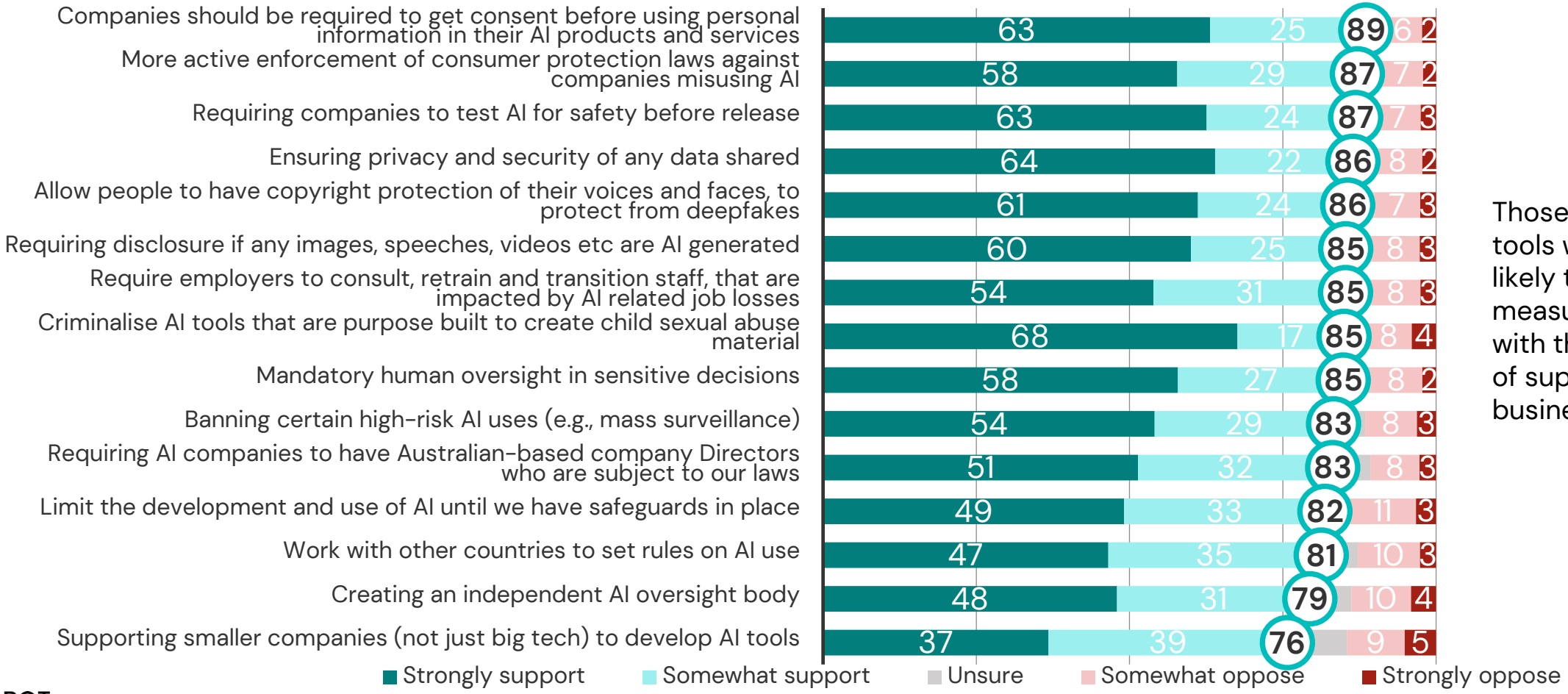
Those who use AI were more likely to indicate trust in all tested organisations than those who don't.

TALBOT MILLS RESEARCH

Base: Australian adults (n=2004, August 2025)

Support for specific regulation

How strongly do you support or oppose each of the following types of AI regulations? (%)



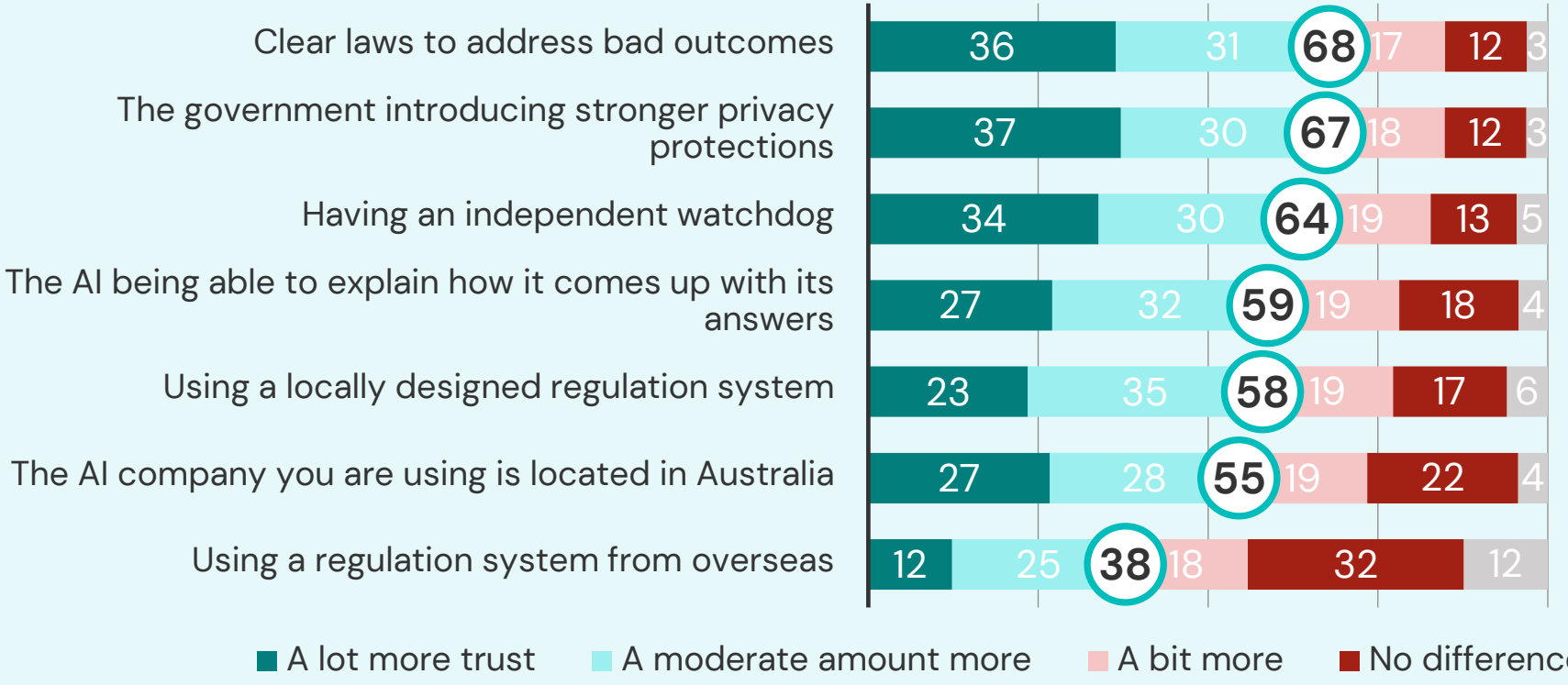
Those who use AI tools were more less likely to support all measures (76-86%), with the exception of supporting small businesses (79%).

TALBOT MILLS RESEARCH

Base: Australian adults (n=2004, August 2025)

What would increase trust?

How much would each of the following increase your trust in AI? (%)



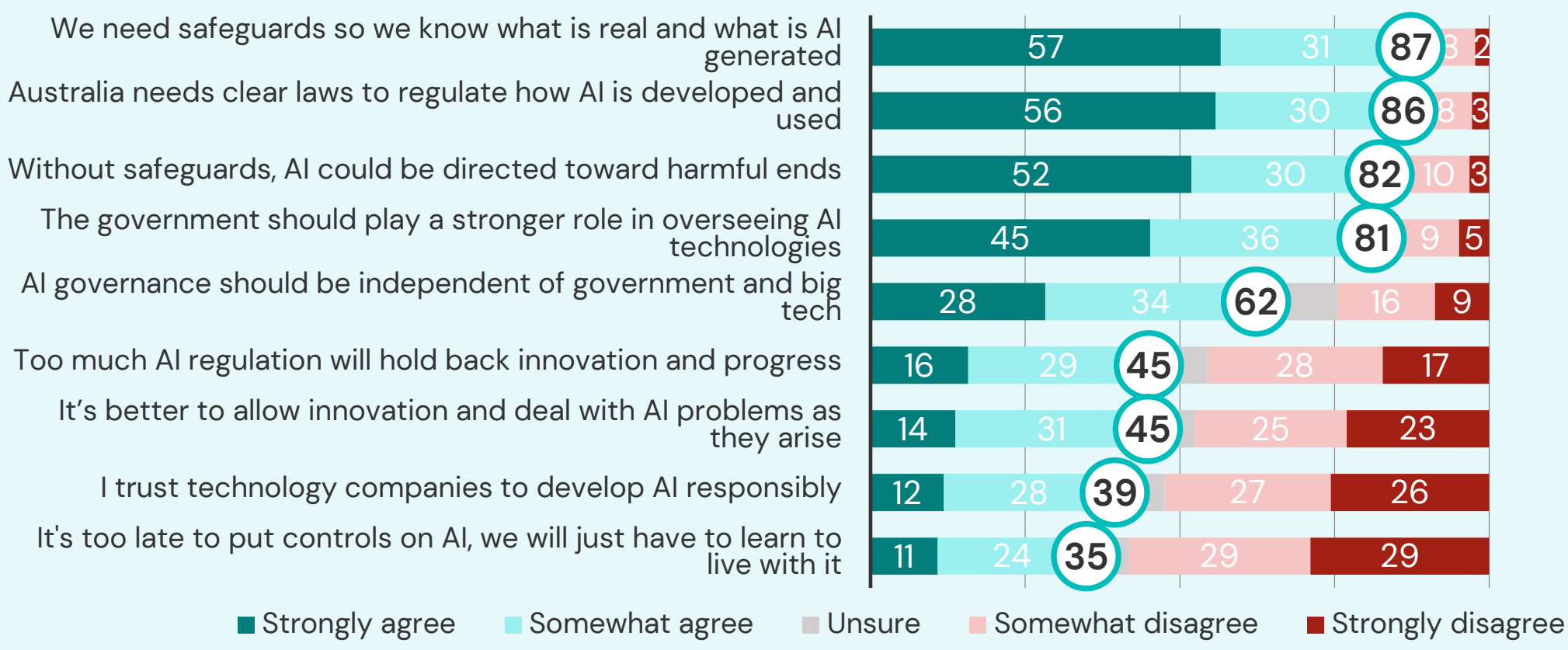
Those who use AI were more likely to say all tested measures would increase their trust a lot more a moderate amount (49-74%).

TALBOT MILLS RESEARCH

Base: Australian adults (n=2004, August 2025)

Agreement: Regulation

How strongly do you agree or disagree with the following? (%)



TALBOT MILLS RESEARCH

Base: Australian adults (n=2004, August 2025)

AI usage

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Usage summary

AI use was widespread, especially for personal purposes, with ChatGPT leading.

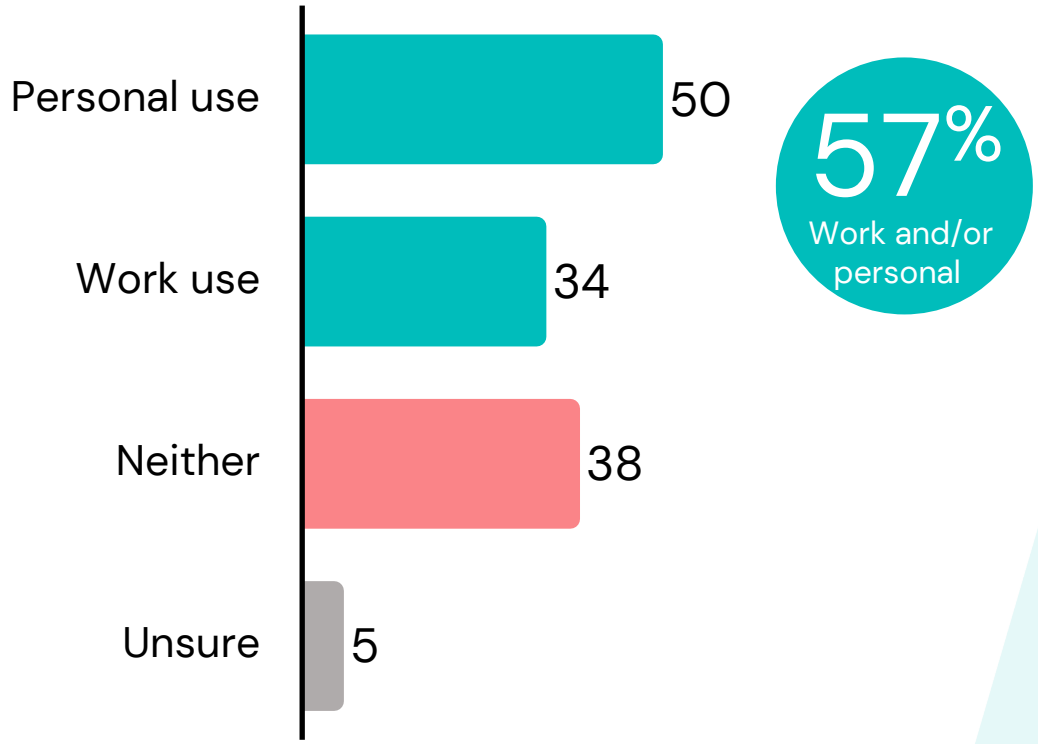
- 50% had used AI personally, 34% for work, and 57% in either context.
- Common uses included learning (59%) and looking up information (52%). 43% use it for writing/editing. Less common uses were life advice, image generation, health advice, recipes, and travel planning (27-30%).
- ChatGPT was the most used tool (75%), followed by Gemini (30%), Copilot (26%), Grok (7%), Claude (6%) and Perplexity (5%).
- 39% started using AI in the past year, 38% in the 1-2 years, and 18% more than 2 years ago.
- 38% use AI daily, 43% weekly.

Strong calls for more education and many admitting their own lack of understanding and trust.

- While 87% said the public needs more education on AI's risks and benefits, 86% wanted clear labelling, and 85% stressed checking outputs, many also acknowledged gaps in their own knowledge—68% did not know when AI is being used, only 49% said they understand how it works, and just 39% trusted its output.
- 54% agreed that people who don't embrace AI will be left behind, but comfort with higher-risk uses remained low (32% comfortable with self-driving cars, 31% with sharing personal data).

Personal and work use of AI

Do you use AI tools for work and/or personal use? (%)



Managers (63%) and professionals (56%) were mor likely to say the use AI in their work, while sales and service workers (36%) and operators, drivers and laborers (29%) were less likely.

Younger respondents were more likely to use AI personally or in work:

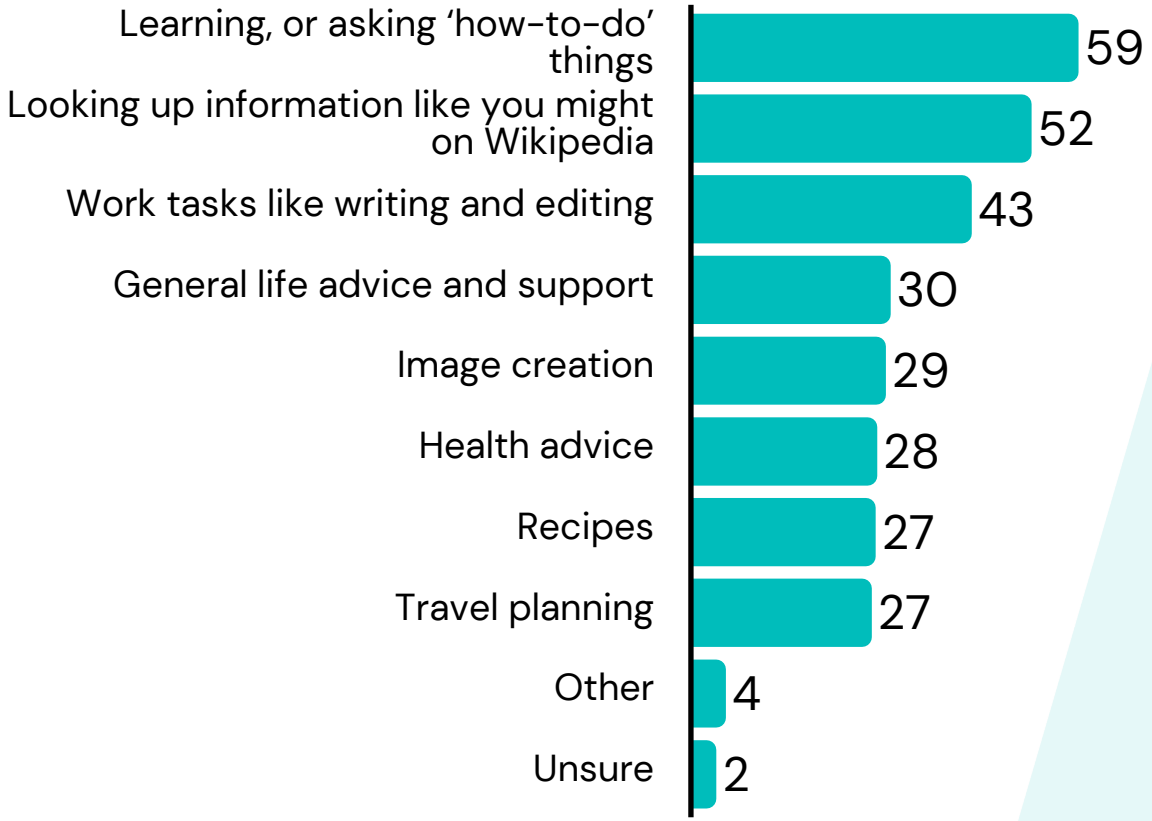
- Under 30: 80%
- 30-44: 77%
- 45-59: 55%
- 60+: 19%

TALBOT MILLS RESEARCH

Base: Australian adults (n=2004, August 2025)

Variety of AI usage

[Those who use AI] What are you using AI for? (%)



Users of AI aged 30-44 were more likely to say work tasks (49%) and life advice (36%).

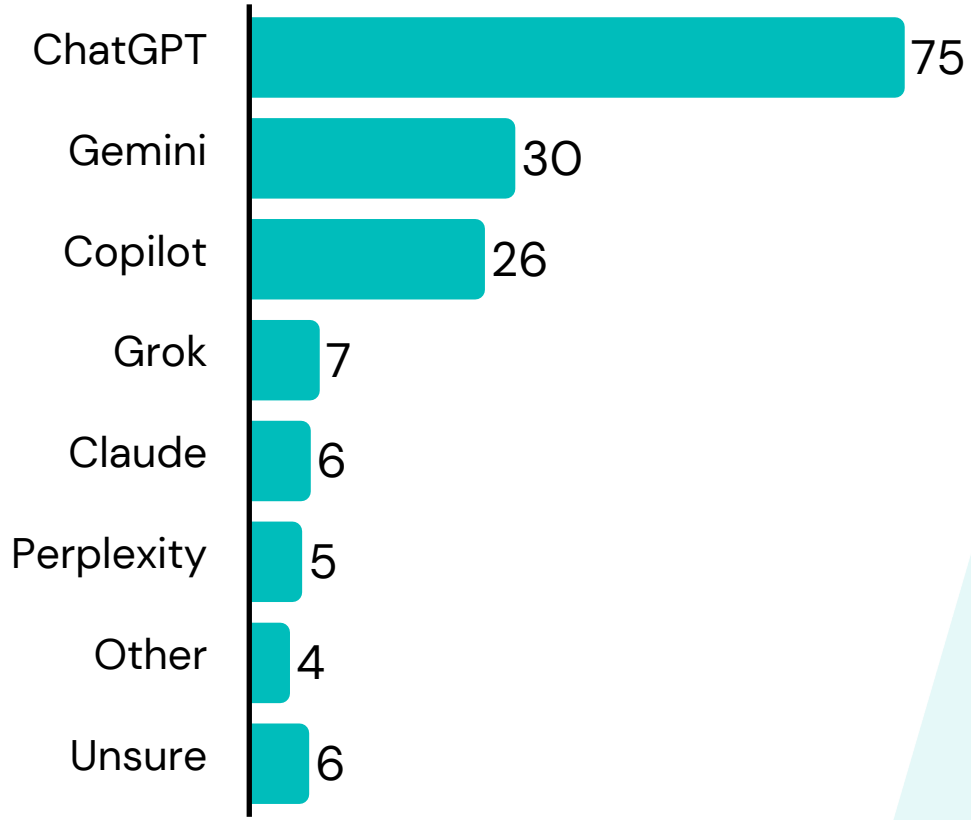
Those in households earning $100K or more were more likely to say work tasks (48%) and travel planning (34%).

TALBOT MILLS RESEARCH

Base: Those who use AI (n=1101, August 2025)

AI tools used

[Those who use AI] What AI tools do you regularly use? (%)



Men were more likely using a variety with Gemini (35%), Copilot (31%) and Grok (10%) all more frequently listed.

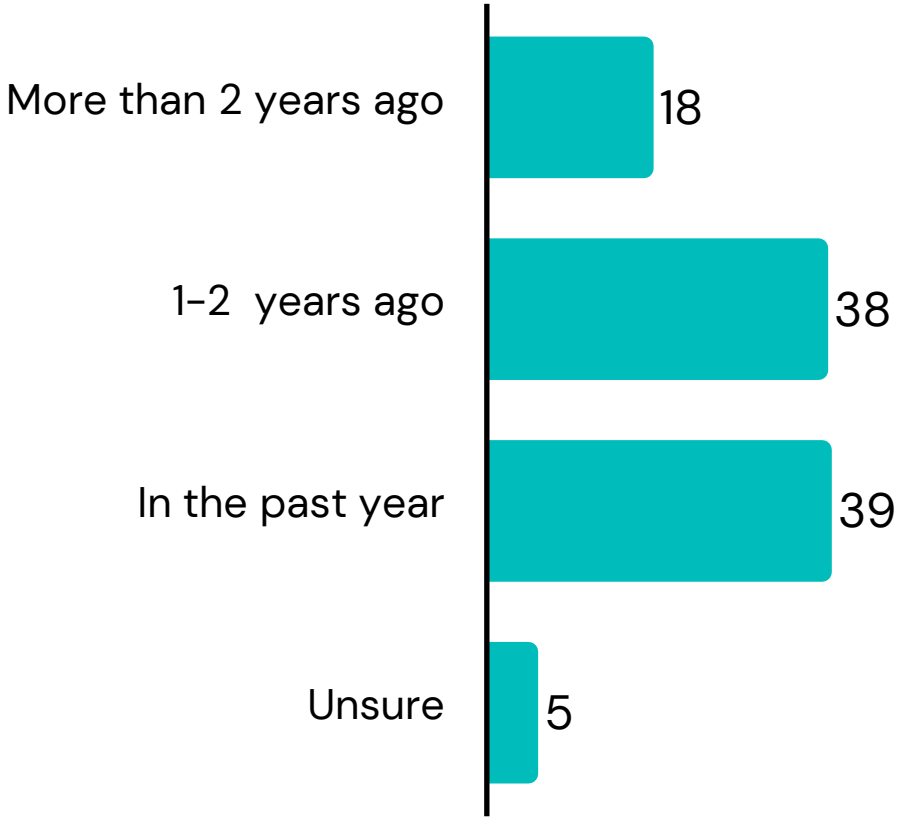
Those who use AI for work were more likely to list ChatGPT (80%), Gemini (34%) and Copilot (31%).

TALBOT MILLS RESEARCH

Base: Those who use AI (n=1101, August 2025)

When people started using AI tools

[Those who use AI] Roughly when did you start using AI tools? (%)



Men were more likely to claim more than two years ago (23%) than women (13%).

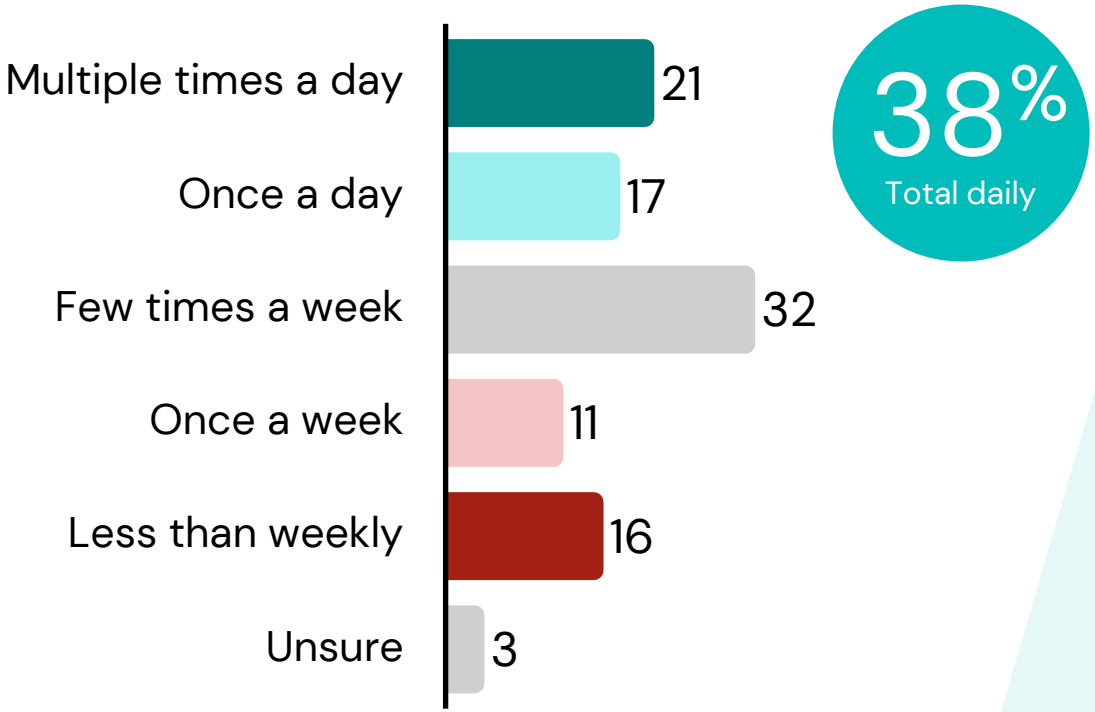
Those aged under 30 were more likely to say 1-2 years ago while those aged 45-59 were more likely to say in the past year.

TALBOT MILLS RESEARCH

Base: Those who use AI (n=1101, August 2025)

Frequency of use

[Those who use AI] Roughly how often are you currently using AI tools? (%)



44% of me say they used it daily compared to 31% of women.

Younger respondents were more likely to say they use it daily

- Under 30: 41%
- 30-44: 43%
- 45-59: 30%
- 60+: 32%

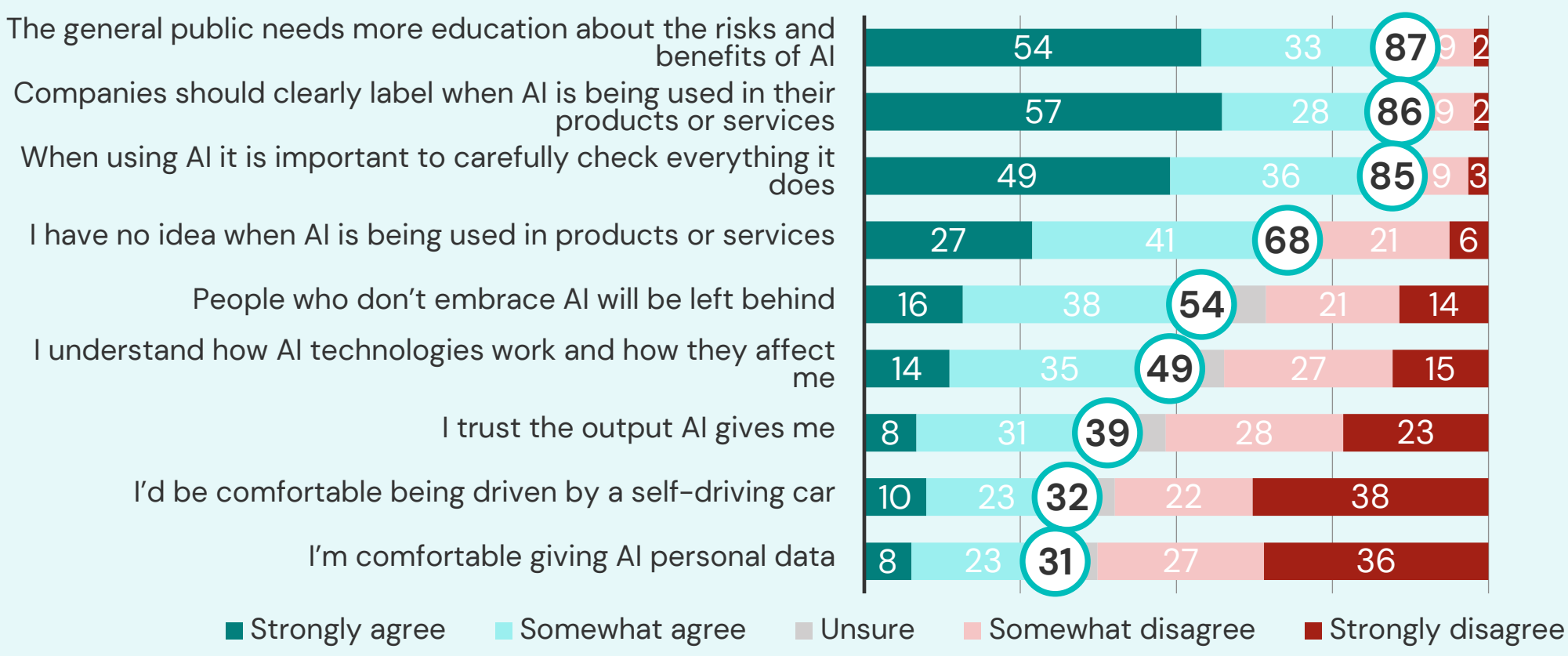
51% of those who live in a city use it daily and 46% of those who use it for work.

TALBOT MILLS RESEARCH

Base: Those who use AI (n=1101, August 2025)

Agreement: Knowledge/usage

How strongly do you agree or disagree with the following? (%)



TALBOT MILLS RESEARCH

Base: Australian adults (n=2004, August 2025)

About Talbot Mills Research

Talbot Mills Research specialises in corporate, social, and political research.

Our experience spans a wide range of sectors globally including politics, infrastructure, energy, transport, the primary sector, financial services, and public policy.

Talbot Mills Research principals, David Talbot and Stephen Mills, have had roles in strategy at the highest levels of politics and business.

David was pollster to New Zealand Prime Minister Jacinda Ardern, and now works for a range of Australian Federal and State political leaders as well as decision-makers in many listed companies.

As a firm, Talbot Mills Research is regularly cited in international media and have been the most accurate pollsters in many Australasian races.

They use their deep understanding of the public mindset to provide trusted research-based information and advice to corporate and political decision-makers around the world.

The team at Talbot Mills Research offer a full range of methodologies to measure public sentiment and are unique in having the strategic expertise to help build interventions to shift it.

Offices are located in New Zealand (Wellington, Auckland), Australia (Sydney, Brisbane, Melbourne, Canberra, Perth), and the UK (London).

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enquiries@talbotmillsresearch.com