

METHODOLOGY DISCLOSURE STATEMENT

Client name	.au Domain Administration (auDA)
Project name	Digital Lives of Australians 2024 - Opportunities and challenges of a rapidly evolving internet
Project reference	SNR 2311013 / AUDA004
Research dates:	February - March 2024
Target population:	Australian consumers (adults in the general population) and small businesses (owners, managers, or decision makers) with between 1 and 19 employees.
Research methodology:	An online survey of a sample of n=1,500 consumers and n=400 small business owners or managers. The average survey completion time was 20 minutes. Survey participants were sourced via a commercial research panel and rewarded with points upon completion. A three-day online discussion forum followed, with roughly one hour of participation each day. The forum comprised n=24 consumers and n=16 small business owners or managers selected from the survey respondent base. A subsequent one-hour in-depth interview (held online) was conducted with n=8 consumers and n=8 small business owners or managers. Participants for the online forum and in-depth interviews were provided with additional reward points. All participation was on a voluntary, opt-in basis.
Weighting approach:	<p>The sample was weighted to match ABS Census population data, using rim weighting. The consumer sample was weighted by age, gender, location, education and workforce participation. The small business sample was weighted by industry sector and location.</p> <p>For consumers, the total effective sample size after weighting was approximately 73%, equating to a margin of error of approximately +/-2.0% (at the 95% confidence interval) for estimates based on the total sample. For small businesses, the total effective sample size after weighting was approximately 63%, equating to a margin of error of approximately +/-5.0%.</p>
Research questions:	The question line was created by SEC Newgate for the purpose of this research. All response options were visible to participants. A combination of single choice, multiple choice and open-ended (text response) questions were used. For multiple choice questions and statement grids, the order of response options was randomised to avoid potential order effect.

This research was conducted in accordance with the Australian Polling Council Quality Mark standards which can be viewed here: <https://www.australianpollingcouncil.com/>

Questions

Section 1: Value of the internet

NEW SCREEN

CONSUMER: Please think about all the ways in which you use the internet across all aspects of your life.

SMALL BUSINESS: The next few questions are about your business' use of the internet and online activities. Please think about all the ways in which you use the internet within the business.

Q1.	Thinking broadly about the internet and online activities, overall, how confident would you say you are in using the internet?
	<ol style="list-style-type: none"> 1. Very confident 2. Somewhat confident 3. Neither confident nor unconfident <SKIP Q2> 4. Somewhat unconfident 5. Very unconfident

Q2.	<p>CONSUMER: Thinking about all aspects of your life, how important would you say the internet is to you?</p> <p>SMALL BUSINESS: Thinking about all aspects of your business, how important would you say the internet is to the business?</p>
	<ol style="list-style-type: none"> 1. Very important 2. Somewhat important 3. Neither important nor unimportant 4. Somewhat unimportant 5. Very unimportant

CONSUMER ONLY

Q3.	Which one of the following statements best describes how you personally feel about the internet?
	<ol style="list-style-type: none"> 1. The internet is invaluable and I couldn't live without it 2. The internet adds a lot of value to my life and I couldn't imagine life without it 3. The internet adds some value but I could live without it 4. The internet doesn't add value to my life, I don't need it

CONSUMER ONLY. ASK IF CURRENTLY WORKING (S10=1-4)

Q4.	Where do you work and how often?
	<ol style="list-style-type: none"> 1. In a dedicated place of business (e.g. office, factory, shop) - all the time 2. Work from home - all the time 3. Hybrid - a mix of working from home and working from a dedicated site 4. Somewhere else (please specify) <SPECIFY>

Q5. Do you need the internet to do your job?

1. Yes, I could not do my job without it
2. No, I could do my job without the internet, but it helps make my job easier or better
3. No, I can do my job completely without the internet

SMALL BUSINESS ONLY

Q6. Which **one** of the following statements best describes how you feel about the internet and the role it plays in your business?

1. The internet is invaluable; the business couldn't function without it
2. The internet adds a lot of value; the business would struggle to function without it
3. The internet adds some value, but the business could function without it
4. The internet doesn't add any value; the business could function fully without it

Q100.

CONSUMER: Do you have a personal website?

SMALL BUSINESS: Does your business have a dedicated website?

1. Yes
2. No

CONSUMER ONLY

Q7. Some people feel the internet **benefits** their lives in different ways. Please rank each of the benefits below in order from greatest to least benefit for you personally by clicking each benefit in rank order. The first item you click on will be ranked 1, the second item ranked 2, etc., until you click on the final. You can remove a ranking by clicking on the item again.

RANDOMISE

- A. Connection with others
- B. Information and learning
- C. Fun and entertainment
- D. Personal organisation
- E. Earning money
- F. Access to goods and services

1. 1 - Greatest benefit
2. 2
3. 3
4. 4
5. 5
6. 6 - Least benefit

SMALL BUSINESS ONLY

Q8. Some people feel the internet **benefits** their business in different ways. Please select **up to five (5)** from the list below that you consider the greatest benefit for your business.

RANDOMISE. MULTIPLE RESPONSE - MAX 5

- A. Promoting the business to existing and potential customers
- B. Interaction with customers
- C. A channel for sales / orders
- D. Automating activities to create efficiencies
- E. Monitoring business performance
- F. Communication between staff
- G. The ability to work remotely
- H. Information and learning
- I. Business management and administration

Q9. Below are some **concerns** that some people have when using the internet. Please indicate the extent to which these things are a concern for [**CONSUMER** you. / **SMALL BUSINESS** your business.]

RANDOMISE

No concern at all	A minor concern	A major concern
1	2	3
1. Knowing which companies you can trust to keep your information secure 2. Ensuring the privacy of [your / your business'] online activities 3. CONSUMER ONLY Spending too much time on the internet 4. CONSUMER ONLY Identifying fake news and misinformation online 5. Avoiding online threats such as phishing scams 6. Remembering passwords for websites and online accounts 7. SMALL BUSINESS ONLY Keeping business data secure		

CONSUMER ONLY

Q10. Please indicate whether, on balance, the internet has a **positive or negative effect** on the following aspects of your life.

Select one answer for each. If for any aspect there has been both a positive and negative effect, please choose whether it has been more positive or more negative.

**RANDOMISE, KEEP E-F AND J-K TOGETHER
ONLY SHOW A IF CURRENTLY WORKING (S10 = 1-4)**

Positive effect	Negative effect	No effect / Not applicable
1	2	3

- A. Your work-life balance
- B. Your ability to make new social connections
- C. Your romantic relationships
- D. Managing your personal affairs
- E. Your physical health and wellbeing
- F. Your mental health and wellbeing
- G. Your relationships with your family
- H. Your relationships with your friends
- I. Your ability to learn new things about the world and life in general
- J. Your ability to work
- K. Your ability to earn additional income
- L. Having your say about causes you support
- M. Getting involved in your hobbies or interests
- N. Connecting with your local community
- O. Your ability to access goods and services
- P. Your ability to access government services
- Q. Your professional development and skills-building

SMALL BUSINESS ONLY

Q11. Please indicate whether, on balance, the internet has had a **positive or negative effect** on the following aspects of the business.

Select one answer for each. If for any aspect there has been both a positive and negative effect, please choose whether it has been more positive or more negative.

RANDOMISE

Positive effect	Negative effect	No effect / Not applicable
1	2	3
<ul style="list-style-type: none"> A. Customer interactions B. The culture of the business C. Sales / revenue D. Competition E. Efficiency of business processes F. Managing and communicating with staff G. Rapport between staff and team building H. Administrative tasks I. Operating costs J. Your ability to recruit new staff K. Training and skills-building L. Attracting new customers 		

CONSUMER ONLY

Q12. Below are some issues that some people have said prevent them from using the internet more. Which, if any, affect you and your ability to do the things you would like to do online?
Select all that apply

RANDOMISE. KEEP 1/2 AND 3/4 AND 5/6 TOGETHER. MULTIPLE RESPONSE

1. Slow or unreliable Wi-Fi connection at home
2. Slow or unreliable 4G / 5G
3. Cost of home broadband
4. Cost of mobile data
5. Concern about privacy of your online activity
6. Concern about the security of your personal data online
7. Fear of being scammed or tricked
8. Not knowing how to do the online activities or tasks that you would like to do
9. Not having enough time to do the things you would like to do online
10. Finding a balance between online and offline activities
11. Accessibility standards for online tasks and activities do not cater to my needs
12. None of these, I can do everything I need or want to online already **<ANCHOR. EXCLUSIVE>**

Data Quality Check

Q13. Please type in the number forty below.

NUMERIC RESPONSE, ALLOW TWO DIGITS, CLOSE IF RESPONSE IS NOT 40

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Section 2: Cyber security

Next there are some questions about online security, including your privacy and data security when using the internet.

Q14. How **confident** are you in each of the following?
Select one answer for each.

RANDOMISE

Very confident	Somewhat confident	Neither confident nor unconfident	Somewhat unconfident	Very unconfident
1	2	3	4	5

- A. Keeping your [**CONSUMER:** personal / **SMALL BUSINESS:** business] information secure online
- B. **SMALL BUSINESS ONLY** Keeping your staff and clients' personal data secure online
- C. Spotting an online scam
- D. Knowing where to report a data security breach
- E. **SMALL BUSINESS ONLY** Knowing what to do if any of your business accounts are hacked or your business has an online security breach
- F. Creating strong passwords/passphrases for websites or apps
- G. Spotting misinformation or 'fake news'
- H. Safely backing up [**CONSUMER:** your] [**SMALL BUSINESS:** your business'] data and files
- I. Finding reputable information on how to be secure online

Q15. Thinking now about **online security**. Which of the following, if any, **CONSUMER:** do you personally / **SMALL BUSINESS:** does your business] do?
Please select one answer for each item.

RANDOMISE. KEEP A/B/C AND O/P TOGETHER

No, have never done this	No, but have done this in the past	No, but plan to do this in the future	Yes, do this currently	Not applicable
1	2	3	4	5
<p>A. Use a password manager that you pay a fee to use</p> <p>B. Use a free password manager</p> <p>C. Save passwords in an internet browser (e.g. Chrome, Safari, Edge)</p> <p>D. Use multifactor authentication where available</p> <p>E. Apply password protection/encryption to digital documents</p> <p>F. Undertake a cyber security 'health check' to assess the strength of [your / your business] cyber security measures</p> <p>G. [IF HAVE A WEBSITE Q100=1] Regularly check your website security with an online tool</p> <p>H. [SMALL BUSINESS ONLY] Educate employees about best practice cyber security</p> <p>I. Maintain up-to-date antivirus software on [your computer / your business] computers]</p> <p>J. [CONSUMER ONLY] Adjust settings on social media platforms to restrict who has access to your content</p> <p>K. [SMALL BUSINESS ONLY] Restrict access to who can login and post on your business' social media accounts</p> <p>L. [CONSUMER ONLY] Use pseudonyms or avatars instead of your real name or photograph when creating an online profile</p> <p>M. Use a Virtual Private Network (VPN)</p> <p>N. Have a hardware firewall installed for your [CONSUMER: home] [SMALL BUSINESS: business'] computer network</p> <p>O. Keep a record of your passwords on a computer or phone</p> <p>P. Keep a record of your passwords in a notebook or on paper</p> <p>Q. Use the same password for multiple websites and applications</p> <p>R. Share your login details for subscription services with others (e.g. streaming platform, online newspaper)</p>				

Q16. How would you rate **[CONSUMER: your / SMALL BUSINESS: the business']** ability to do each of these things to protect your privacy and data security online?
Please select one answer for each item.

ASK IF NOT DONE CURRENTLY AND NOT N/A (Error! Reference source not found.5#4,5)

I have no idea how to do this	I would need some guidance to do this	I could do this without any guidance
1	2	3

- A. Use a password manager
- B. Save passwords in your internet browser (e.g. Chrome, Safari, Edge)
- C. Use multifactor authentication where available
- D. Apply password protection/encryption to digital documents
- E. Undertake a cyber security 'health check' to assess the strength of **your** / **your business'** cyber security measures
- F. **[IF HAVE A WEBSITE Q100=1]** Regularly check your website security with an online tool
- G. **[SMALL BUSINESS ONLY]** Educate employees about best practice cyber security
- H. Maintain up-to-date antivirus software on **your computer** / **your business'** computers
- I. **[CONSUMER ONLY]** Adjust settings on social media platforms to restrict who has access to your content
- J. **[SMALL BUSINESS ONLY]** Restrict access to who can login and post on your business' social media accounts
- K. **[CONSUMER ONLY]** Use pseudonyms or avatars instead of your real name or photograph when creating an online profile
- L. Use a Virtual Private Network (VPN)
- M. Install a hardware firewall for your **[CONSUMER: home]** **[SMALL BUSINESS: business']** computer network

SMALL BUSINESS ONLY

Q17. Which of these things does your business do in relation to **cyber security**?
Select all that apply.

RANDOMISE. MULTIPLE RESPONSE. CODES 97 AND 99 EXCLUSIVE

1. Employ someone with responsibility for IT and online security
2. Use an external IT and online security consultant
3. The business has a cyber security policy
4. Regularly talk about cyber security with staff
5. Regularly talk about cyber security with the business owner / manager
6. Provide staff with cyber security training
7. Provide staff with **regular** cyber security training (i.e. monthly, quarterly etc.)
8. Audit cyber security practices and procedures on a regular basis (i.e. annually)
9. Don't do any of these things
10. Unsure

Q18. If you needed **to find out more** about online security, or you needed to **upgrade** **[CONSUMER: your / SMALL BUSINESS: your business']** online security practices, **who would you go to for help**?
Select all that apply.

RANDOMISE 1 TO 16. CODES 17-19 EXCLUSIVE

1. Family
2. Friends
3. Work colleagues
4. Workplace IT support **[DISPLAY IF CURRENTLY WORKING (S10 = 1-4)]**
5. Google (or another search engine)
6. Online resources (e.g. YouTube videos)
7. Government websites (e.g. cyber.gov.au or esafety.gov.au)
8. Your internet service provider
9. A website manager or developer

10. A website or email registrar (e.g. Go Daddy)
11. Your bank
12. The help and support function on individual websites or apps
13. Technology website or magazine
14. Online forums / discussion boards
15. **SMALL BUSINESS ONLY** IT or cyber security consultant
16. Someone else (please specify) **<SPECIFY>**
17. No one
18. Not sure

Q19. Following are some things other people have said about online security. Please indicate the extent to which you **agree or disagree** with each statement?
Please select one answer for each statement

RANDOMISE STATEMENTS

Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
1	2	3	4	5

- A. Cyber criminals are becoming smarter and more sophisticated, so it is important to stay up to date with the latest online security trends
- B. **CONSUMER** I feel confident I have safeguards in place to keep my personal data secure online / **SMALL BUSINESS** I feel confident the business has safeguards in place to keep its data secure online
- C. **SMALL BUSINESS ONLY** I feel confident the business has safeguards in place to keep **staff and clients'** data secure online
- D. I am not worried about cybercrime as I don't feel I have much to lose
- E. **CONSUMER** **[ASK IF WORK FROM HOME (Q4=2 OR 3)]** I am more worried about cyber security at home than I am at work as I don't have the resources at home to guard against it
- F. I would like to improve my online security, but I don't know what to do
- G. I know I shouldn't use the same password for multiple accounts, but I do because it is easier than having to remember lots of different passwords
- H. I plan to reduce my online activity due to concerns about online security
- I. Companies should be doing more to protect the personal information of their customers from cyberattacks
- J. Companies should be subject to penalties if they fail to protect their customers personal information from cyberattacks

CONSUMER ONLY

Q20. Are there any online activities that you actively **avoid** due to fear or concerns you have about online security?

RANDOMISE A TO J. MULTIPLE RESPONSE

- A. Internet or mobile banking
- B. Use social media, including posting your own content on social media
- C. Communicate with others using instant messaging apps (e.g. WhatsApp, Messenger)
- A. Buying groceries online
- B. Buying products (other than groceries) online
- C. Using an internet enabled wearable device (e.g. Apple Watch, Fitbit)
- D. Using internet connected 'smart home' devices (e.g. smart lighting, video surveillance)
- E. Selling products online (e.g. via eBay, Gumtree, Facebook Marketplace)
- F. Paying bills or sending / receiving money via online payment systems
- G. Accessing government services online (e.g. MyGov, Medicare)
- H. Managing investments online)
- I. Using a virtual assistant (e.g. Amazon's Alexa, Apple's Siri or Google Assistant)
- J. Using generative AI tools (e.g. ChatGPT, Bard, DALL-E)
- K. None of these / Don't avoid any online activities because of online security concerns **<ANCHOR>**
<EXCLUSIVE>

SMALL BUSINESS ONLY

Q21. Are there any online activities that the business actively **avoids** due to fears or concerns about online security?

RANDOMISE ITEMS A TO M. MULTIPLE RESPONSE

- A. Promoting the business via paid online advertising on third party websites (not including social media)
- B. Advertising or promoting the business on social media platforms
- C. Promoting your business using search engine optimisation (SEO)
- D. Selling products on your own website
- E. Selling products via an online marketplace (e.g. eBay)
- F. Taking bookings via an online booking system on your own or a third-party website
- G. Using online platforms for business functions (e.g. payroll, accounts, HR, CRM)
- H. Using online collaboration solutions for staff to communicate (e.g. Microsoft Teams)
- I. Record and monitor staff attendance
- J. Using online platforms for inventory and stock control
- K. Collecting feedback from customers or clients
- L. Using generative AI tools (e.g. ChatGPT, Bard, DALL-E)
- M. Allowing staff to work remotely
- N. Something else (please specify) **<SPECIFY>**
- O. None of these / Don't avoid any online activities because of online security concerns **<ANCHOR>**
<EXCLUSIVE>

DISPLAY Q22 AND Q23 ON SAME SCREEN

Q22. Have any of the following things happened to [**CONSUMER**: you / **SMALL BUSINESS**: your business] in the past year or so?

MULTIPLE RESPONSE

1. Received a **text message or email** that you thought/knew was a scam
2. Received a message or friend request on **social media** you thought/knew was a scam
3. Had an email or social media account hacked
4. Had your [personal / business] data compromised due to a cyberattack on a company of which you are a customer
5. **SMALL BUSINESS ONLY** A ransomware attack (where malware encrypted/locked access to files and a ransom payment was demanded)
6. Unsure **<EXCLUSIVE>**
7. None of these **<EXCLUSIVE>**

ASK IF ANY OF CODES 1-5 SELECTED AT Q22

Q23. What, if anything, did you do as a direct consequence of your experience? For example, did you start, stop or change anything in relation to your online activity and behaviour?

OPEN-TEXT BOX - MINIMUM 5 WORDS

Section 3: Digital skills

Next there are some questions about your interest in, and ability with, a range of online activities.

ASK ALL. CONSUMER: ASK ONLY IF NOT RETIRED (Error! Reference source not found.≠5)

Q24. How **important** are each of these online activities to your [**CONSUMER**: job / career, **SMALL BUSINESS**: business] whether now or in the future?

RANDOMISE

Not at all important	Not very important	Somewhat important	Very important	Essential
1	2	3	4	5

- A. Coding and programming (e.g. Python, Java)
- B. Data analytics (e.g. R, SQL)
- C. Online collaboration tools (e.g. SharePoint, Trello)
- D. Website development and maintenance
- E. Maintaining a social media presence
- F. Artificial Intelligence (AI) and Machine Learning
- G. Data visualisation
- H. App development
- I. Using Customer Relationship Management (CRM) software (e.g. Salesforce, HubSpot)
- J. Digital photo editing and/or video production
- K. Cyber security skills (e.g. data security, secure app development, cloud and network security, cyber threat intelligence, incident response, risk management, security compliance)

ASK ALL

Q25. How would you rate your [**CONSUMER**: ability, **SMALL BUSINESS**: business' capability] with each of these online activities?
Please select one answer for each activity.

RANDOMISE ACTIVITIES

[I have no idea how to do this / Zero capability with this]	[I would need some guidance to do this / Limited capability with this]	[I could do this without any guidance / High capability with this]
1	2	3
A. Coding and programming (e.g. Python, Java) B. Data analytics (e.g. R, SQL) C. Online collaboration tools (e.g. SharePoint, Trello) D. Website development and maintenance E. Maintaining a social media presence F. Using Artificial Intelligence (AI) and Machine Learning G. Data visualisation H. App development I. Customer Relationship Management (CRM) software (e.g. Salesforce, HubSpot) J. Digital photo editing and/or video production K. Cyber security skills (e.g. data security, secure app development, cloud and network security, cyber threat intelligence, incident response, risk management, security compliance)		

CONSUMER ONLY

<p>Q26. Now thinking about some more general online activities that you might undertake in your daily life. Do you currently do any of the following? <i>Select all that you do no matter how frequently or infrequently.</i></p>
<p>RANDOMISE ACTIVITIES. MULTIPLE RESPONSE.</p> <ol style="list-style-type: none"> 1. Internet or mobile banking 2. Use social media, including posting your own content on social media 3. Communicate with others using instant messaging apps (e.g. WhatsApp, Messenger) 4. Buy groceries online 5. Buy products (other than groceries) online 6. Watch or listen to a streaming service or podcasts (e.g. Netflix, Spotify) 7. Make or receive video calls 8. Use an internet enabled wearable device (e.g. Apple Watch, Fitbit) 9. Find news or information online 10. Use internet connected 'smart home' devices (e.g. smart lighting, video surveillance, home hub) 11. Sell products online (e.g. via eBay, Gumtree, Facebook Marketplace) 12. Pay bills or send and receive money via online payment systems 13. Access government services online 14. Undertake online learning (e.g. classes, courses or webinars) 15. Manage investments online 16. Use a virtual assistant (e.g. Alexa, Siri or Google Assistant) 17. Use generative AI tools (e.g. ChatGPT, Bard, DALL-E) 18. None of these <ANCHOR> <EXCLUSIVE>

<p>Q27. Please indicate whether in the future, you expect to do these online activities more or less often than you do currently? <i>Please select one answer for each activity.</i></p>			
<p>SHOW ITEMS SELECTED AT Q26. SKIP IF NO ITEMS SELECTED (Q26=17).</p>			
Stop doing	Do less often	Do about the same as current	Do more often

1	2	3	4
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Q28. Would you be interested in doing any of these online activities in the future?
Please select all that you would be interested in doing.

SHOW ITEMS NOT SELECTED AT Q26.

Section 4: Emerging technologies

Now there are some questions about some emerging internet-enabled technologies.

Q29. How much do you **know** about each of these technologies?
Please select one answer for each.

RANDOMISE TECHNOLOGIES

A. Artificial intelligence (AI)
B. Virtual and augmented reality (including the metaverse)
C. Blockchain
D. Robotics

1. **A lot** - I am confident I could explain it in detail to others
2. **A fair bit** - I could explain it at a basic level only
3. **A little** - I have a reasonable understanding but would struggle to explain it to others
4. **Not much** - I would need someone to explain this to me
5. Nothing at all

Q30. Now thinking about some online activities that these technologies support... how **useful** do you think each of these online activities would be to [**CONSUMER**: you in your everyday life / **SMALL BUSINESS**: your business]?

RANDOMISE TECHNOLOGIES AND ACTIVITIES WITHIN EACH TECHNOLOGY. DO NOT SHOW HEADINGS

Not at all useful	Not very useful	Somewhat useful	Very useful	Extremely useful
1	2	3	4	5

ARTIFICIAL INTELLIGENCE

A. AI assistants to help with everyday tasks (e.g. Microsoft Co-Pilot)
B. AI tools for note taking and organisation (e.g. Otter.ai)
C. Generative AI apps or tools to create text, images or other content (e.g. ChatGPT, Leonardo.ai)
D. **SMALL BUSINESS ONLY** AI chatbots to provide customer service

BLOCKCHAIN

E. Making (or receiving) payments or money transfers using blockchain
F. **CONSUMER ONLY** Investing in cryptocurrencies, NFTs or other digital assets that use blockchain
G. **SMALL BUSINESS ONLY** Registering blockchain domain names

VIRTUAL AND AUGMENTED REALITY / THE METAVERSE

H. **SMALL BUSINESS ONLY** Having virtual meetings with colleagues or clients in the metaverse

- I. **[SMALL BUSINESS ONLY]** Promoting your business or selling products / services in the metaverse
 - J. **[CONSUMER ONLY]** Experiencing virtual events (e.g. concerts, conferences) in the metaverse
 - K. **[CONSUMER ONLY]** Exploring the world using augmented reality (i.e. virtual travel)
 - L. **[CONSUMER ONLY]** Keeping in touch with family and friends in the metaverse
- ROBOTICS**
- M. **[CONSUMER ONLY]** Using robots for domestic chores (e.g. cleaning, vacuuming)
 - N. **[CONSUMER ONLY]** Having products delivered by drones or other autonomous vehicles
 - O. **[SMALL BUSINESS ONLY]** Sending or receiving goods using drone delivery
 - P. **[SMALL BUSINESS ONLY]** Using robotics to automate repetitive tasks (e.g. assembly, packaging)

NEW SCREEN

The next few questions focus on artificial intelligence (AI).

Q31. How much do you agree or disagree with the following statements about artificial intelligence (AI)?

RANDOMISE STATEMENTS

Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree	Don't know
1	2	3	4	5	99

- A. Artificial intelligence (AI) will deliver positive **social** outcomes
- B. Artificial intelligence (AI) will deliver positive **economic** outcomes
- C. Artificial intelligence (AI) will replace human workers and lead to unemployment
- D. I would feel more comfortable about artificial intelligence (AI) if there were stronger regulatory safeguards around it
- E. When I need service <**[SMALL BUSINESS]** or support with a business-related issue>, I would be just as happy to interact with an artificial intelligence (AI) chatbot as I would to interact with a human
- F. **[CONSUMER ONLY. ASK IF NOT RETIRED (S10≠5)]**: Being able to use artificial intelligence (AI) tools will increase my employment prospects
- G. **[SMALL BUSINESS]**: Being able to use artificial intelligence (AI) tools will increase my business' efficiency
- H. I would like to learn more about artificial intelligence (AI) and how it could benefit <**[CONSUMER]**: me in my life / **[SMALL BUSINESS]**: my business>

Q32. Have you ever used artificial intelligence (AI) for any of the following purposes?
Please select all that you have done, even if only once.

RANDOMISE. MR

- 1. Summarise large volumes of text or data
- 2. Create and edit images or videos
- 3. Create and edit text
- 4. AI assistant (e.g. Windows Copilot, Bing AI)
- 5. AI based customer service e.g. chatbots
- 6. Find an answer to a question you had

7. Generate ideas for planning or inspiration
8. Automate a task that you would have had to manually do yourself
9. Solve a problem for you
10. Something else (please specify) **<ANCHOR> <SPECIFY>**
11. None of these / Haven't used AI for any purpose **<ANCHOR> <EXCLUSIVE>**

Q33. How interested are you in using AI for these purposes in the future?

RANDOMISE

Not at all interested	Somewhat interested	Very interested
1	2	3
<ol style="list-style-type: none"> 1. Summarise large volumes of text or data 2. Create and edit images or videos 3. Create and edit text 4. Using an AI assistant (e.g. Windows Copilot, Bing AI) 5. Using AI based customer service e.g. chatbots 6. Find an answer to a question you had 7. Generate ideas for planning or inspiration 8. Automate a task that you would have had to manually do yourself 9. Solve a problem for you 		

CONSUMER ONLY

Q34. To what extent are you using artificial intelligence (AI), if at all?

In your personal life	[SHOW IF EMPLOYED S10=1-4] In your workplace	[SHOW IF STUDENT S9=1-6] In your studies
1	2	3
<ol style="list-style-type: none"> 1. Use it regularly 2. Use it occasionally 3. Used it once or tried using it 4. Thinking about using it 5. [SHOW ONLY TO EMPLOYED UNDER 'IN YOUR WORKPLACE'] We're not allowed to use it at my workplace 6. [SHOW ONLY TO STUDENTS UNDER 'IN YOUR STUDIES'] I'm not allowed to use it in my studies 7. [SHOW ONLY EMPLOYED UNDER 'IN YOUR WORKPLACE'] I'm unsure if my workplace is using it 		

SMALL BUSINESS ONLY

Q35. To what extent is your business using artificial intelligence (AI), if at all?

1. Use it regularly
2. Use it occasionally
3. Used it once or tried using it
4. Thinking about using it
5. Not using it and not thinking about using it
6. Do not allow our employees to use it

Q36. Reflecting on the topics we've covered in this survey, what role do you feel the internet will play in your [**CONSUMER**: life / **SMALL BUSINESS**: business] in the **future**? For example, what would you like to do differently, what are you excited about or concerned about?

OPEN-TEXT BOX - MINIMUM 5 WORDS