METHODOLOGY DISCLOSURE STATEMENT

Client name	.au Domain Administration (auDA)
Project name	Digital Lives of Australians 2025 – How the internet supports Australians and small businesses in a changing world
Project reference	SNR 2409001 / AUDA008

Research dates:	February – March 2025
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=2,000 consumers and n=400 small business owners or managers. The average survey completion time was 22 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=14 consumers and n=12 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=7 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:	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.
	For consumers, the effective sample size after weighting was approximately n=1,480 (a weighting efficiency of approx. 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 effective sample size after weighting was approximately n=265 (a weighting efficiency of approx. 65%), equating to a margin of error of approximately +/-5.0%.
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 use. 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 FOR <mark>SMALL BUSINESS:</mark>
Please note: This survey focuses mainly on your business' use of the internet and online services, but also includes some questions about your personal use as well.
The first few questions are about your business' use of the internet and online services. Please think about all the ways in which you use the internet and online services within the business.

NEW SCREEN FOR <mark>CONSUMER:</mark>

Q1AINTRO. Firstly, please think about all the ways you use the internet across all aspects of your life.

Q1. Thinking broadly about the internet and online activities, overall, how **confident** would you say you are in using the internet?
1. Very confident
2. Somewhat confident
3. Neither confident nor unconfident
4. Somewhat unconfident
5. Very unconfident

<mark>CONSUMER ONLY</mark>

Q2. Which **one** of the following statements best describes how you personally feel about the internet?
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

<mark>CONSUMER ONLY</mark>. ASK IF CURRENTLY WORKING

Q3. Where do you work and how often?
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)

<mark>CONSUMER ONLY</mark>. ASK IF CURRENTLY WORKING

Q4. 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

<mark>SMALL BUSINESS ONLY</mark>

Q5. 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

Q6. **SMALL BUSINESS**: Does your business have a dedicated website?
1. Yes 2. No

Q7. Below are some **concerns** some people have when using the internet. Please indicate how much of a concern they are for [**CONSUMER** you. / **SMALL BUSINESS** your business.]
RANDOMISE

No concern at all	A minor concern	A major concern
1	2	3

1. Knowing who you can trust to keep your information secure
2. Ensuring the privacy of [your / your business'] online activities
3. Identifying fake news and misinformation online
4. Avoiding online scams that could lead to financial losses and/or identity theft
5. **SMALL BUSINESS ONLY** Keeping business data secure

CONSUMER ONLY

Q8. 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 L-M TOGETHER
ONLY SHOW A IF CURRENTLY WORKING

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

A.	Your work-life balance
B.	Your ability to meet new people and make social connections
C.	Your physical health and wellbeing
D.	Your mental health and wellbeing
E.	Your relationships with your family
F.	Your relationships with your friends
G.	Your ability to learn new things
H.	Your ability to work
I.	Your ability to earn additional income
J.	Having your say about causes you support
K.	Connecting with your local community
L.	Your ability to access goods and services
M.	Your ability to access government services
N.	Your professional development and skills-building

Q9. The next few questions ask about how you have been affected by the increased cost of living.

Have you done any of the following in the past year to reduce your living expenses?

RANDOMISE 1-12. CODE 12 EXCLUSIVE. MULTIPLE RESPONSE
1. Changed how or where you do your grocery shopping
2. Changed what you purchase when doing your grocery shopping

3. Cancelled or downgraded subscriptions to online services (e.g. streaming, newspapers, gaming)
4. Switched mobile phone provider or plan to save money
5. Switched broadband provider or plan to save money
6. Cancelled a gym or fitness class membership
7. Reduced spending on take-away food and drinks
8. Took steps to reduce energy usage (e.g. reduced use of heating and air-conditioning)
9. Avoided driving to reduce petrol use
10. Reduced spending on personal items (e.g. clothing)
11. Delayed or foregone upgrading devices (e.g. mobile phone handset, laptop)
12. I'd rather not say **<ANCHOR>**
13. None of the above **<ANCHOR> <EXCLUSIVE>**

Q10. Have you done any of the following in the past year to offset the increased cost of living?

MULTIPLE RESPONSE. RANDOMISE 1-7. MAKE 8 EXCLUSIVE.

1. Increased your works hours or worked overtime **<SHOW THOSE CURRENTLY WORKING>**
2. Started a new job
3. Started an additional job **<SHOW THOSE CURRENTLY WORKING>**
4. Started a 'side hustle' to earn additional money
5. Increased your 'side hustle' activity
6. Participated in online research to earn money or rewards
7. Sold personal belongings
8. None of the above **<EXCLUSIVE>**

Q11. Thinking about your side hustle, how much do you **agree or disagree** with these statements? *Please select one answer for each statement*

ASK IF HAVE A SIDE HUSTLE
RANDOMISE A-B

Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree	Not applicable
1	2	3	4	5	99

A. My side hustle would not be possible without the internet
B. Online platforms enable my side hustle to be more successful

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Q12. Have you used any of the following online resources related to cost of living? I.e. for guidance or support with managing your personal finances, or to identify cost saving opportunities. *Please select all that apply.*

RANDOMISE 1-13. MULTIPLE RESPONSE

1. Online budgeting tools or apps
2. Online video tutorials or newsletters about managing your finances
3. Online discussion forums about managing your finances
4. Online training courses to improve your financial management skills
5. Apps with price alerts (e.g. PetrolSpy)
6. Social media accounts that share details of cost saving deals or offers
7. Online retailers that offer deals or discounts (e.g. Catch)
8. Price comparison websites
9. Browser extension plug-ins that notify you of coupon codes for items you wish to purchase
10. Coupon codes for online purchases
11. Online vouchers or gift cards that can be purchased for less than the voucher value
12. Websites that offer cash back on purchases

13. Apps for booking restaurants that offer discount on the price of your meal
14. None of these **<ANCHOR> <EXCLUSIVE>**

Q13. Please indicate whether, on balance, the internet has had a **positive or negative effect** on the following aspects of your 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, on balance.

RANDOMISE A-L

Very positive effect	Somewhat positive effect	Somewhat negative effect	Very negative effect	No effect / Not applicable
1	2	3	4	5

A. Communicating with customers
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
M. Marketing activity

Q14. Using either the previous list provided or anything else you can think of, what has the internet had the most impact on for your business, whether positive or negative?

OPEN ENDED

Q15. Which, if any, of the following **services have you accessed online**? This might include accessing information, making appointments, or having a conversation or consultation with a service provider via online platforms. *Please select all that apply*

RANDOMISE. MULTIPLE RESPONSE

1. Government services (e.g. Centrelink, ATO)
2. Primary healthcare (e.g. GP, Pharmacist)
3. Allied healthcare (e.g. Psychology, Occupational Therapy)
4. Mental health support services
5. Aged care services
6. Maternal and child health services
7. Emergency, crisis and support services
8. Banking and financial services
9. Real estate
10. None of these **<EXCLUSIVE>**

Q16. What are the **main benefits** to you when accessing these services online?
    Please select all that apply for each service

CAROUSEL. DISPLAY SERVICES SELECTED AT Q15 ONLY. MULTIPLE RESPONSE
1. Saves time
2. Saves money
3. Faster to access the services
4. I feel more comfortable doing this online
5. My privacy is better protected online
6. Easier for me to choose who I speak to
7. Access to a wider range of service providers
A. Government services (e.g. Centrelink, ATO)
B. Primary healthcare (e.g. GP, Pharmacist)
C. Allied healthcare (e.g. Psychology, Occupational Therapy)
D. Mental health support services
E. Aged care services
F. Maternal and child health services
G. Emergency, crisis and support services
H. Banking and financial services
I. Real estate

Section 2: Cyber security

QINTROS2. Next there are some questions about online security, including your privacy and data security when using the internet.

Q17. How **confident** are you in each of the following?
Select one answer for each.

RANDOMISE A-J

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]** Storing your staff and clients' personal data securely 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. Using multifactor authentication (e.g. SMS codes, or mobile phone authentication apps)
H. Spotting misinformation or 'fake news'
I. Safely backing up [**CONSUMER**: your] [**SMALL BUSINESS:** your business'] data and files
J. Finding reputable information on how to be secure online

Q18. 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 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

A. Use a password manager that you pay a fee to use
B. Use a free password manager
C. Save passwords in an internet browser (e.g. Chrome, Safari, Edge)
D. Use multifactor authentication where available (e.g. an SMS message with a 6 digit number)
E. Apply password protection/encryption to digital documents
F. Undertake a cyber security 'health check' to assess the strength of [your / your business'] cyber security measures
G. **[IF HAVE A WEBSITE]** Regularly check your website security with an online tool
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. Have a hardware firewall installed for your [**CONSUMER:** home] [**SMALL BUSINESS**: business'] computer network

SMALL BUSINESS ONLY

Q19. 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 others in the business
5.	Provide staff with cyber security training
6.	Provide staff with **regular** cyber security training (i.e. monthly, quarterly etc.)
7.	Audit cyber security practices and procedures on a regular basis (i.e. annually)
97.	Don't do any of these things
99.	Unsure

Q20. 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 ANCHORED.

1. Family
2. Friends
3. Work colleagues **[DISPLAY IF BUSINESS OR CURRENTLY WORKING]**
4. Workplace IT support **[DISPLAY IF BUSINESS OR CURRENTLY WORKING]**
5. Google (or another search engine)
6. ChatGPT (or another AI tool)
7. Online resources (e.g. YouTube videos)
8. Government websites (e.g. cyber.gov.au or esafety.gov.au)
9. Your internet service provider
10. A website manager or developer
11. A website or email registrar (e.g. GoDaddy)
12. Your bank
13. The help and support function on individual websites or apps
14. Technology website or magazine

15. Online forums / discussion boards
16. **[SMALL BUSINESS ONLY]** IT or cyber security consultant
17. Someone else (please specify) **<SPECIFY>**
18. No one
19. Not sure

Q21. Following are some things other people have said about online security. Please indicate how much you **agree or disagree** with each statement. *Please select one answer for each statement*

RANDOMISE STATEMENTS, KEEP B-C AND F-H TOGETHER

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 CURRENTLY WORKING]** 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 would like to improve my online security, but I don't have the time to put safeguards in place
H. I would like to improve my online security, but I can't afford to upgrade my devices or security software
I. 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
J. I plan to reduce my online activity due to concerns about online security
K. Companies should be doing more to protect the personal information of their customers from cyberattacks
L. Companies should be subject to penalties if they fail to protect their customers' personal information from cyberattacks
M. I am comfortable sharing my personal information with apps and websites in order to receive information or content that is tailored to my individual goals or situation
N. I trust providers of apps and websites to keep my personal information secure

Q22 – Q25 SMALL BUSINESS ONLY

Q22. Approximately how much does the business spend each year on **cyber security**?
Please type in the amount to the nearest dollar (no decimals or cents).
1. **RECORD $ AMOUNT (RANGE $0 - $999,999)**
2. Don't know

Q23. Does the business pay for any of the following cyber security measures?
Please select all that apply.

ASK IF SPEND MONEY ON CYBER SECURITY
RANDOMISE 1-7
1. Secure cloud-based storage
2. Offsite data backup

3. Password manager
   4. Firewall
   5. Virus protection software
   6. Cyber security training for staff
   7. Cyber security consultant
   8. Something else **SPECIFY**
   9. Nothing / Do not spend any money on cyber security
   10. Don't know

Q24. How much does the business intend to spend on cyber security in 2025?

   1. Less than last year
   2. About the same
   3. More than last year
   4. Don't know

Q25. Is the business likely to pay for any of the following cyber security measures in 2025?
Please select all that apply.

RANDOMISE 1-6

   1. Secure cloud-based storage
   2. Offsite data backup
   3. Password manager
   4. Firewall
   5. Virus protection software
   6. Cyber security training for staff
   7. Cyber security consultant
   8. Something else **SPECIFY**
   9. Nothing / Do not spend any money on cyber security
   10. Don't know

CONSUMER ONLY

Q26. Are there any online activities that you actively avoid due to fear or concerns you have about online security, including scams?

RANDOMISE A TO L. MULTIPLE RESPONSE

   1. Internet or mobile banking
   2. Using social media, including posting your own content on social media
   3. Communicating with others using instant messaging apps (e.g. WhatsApp, Messenger)
   4. Buying groceries online
   5. Buying products (other than groceries) online
   6. Using an internet enabled wearable device (e.g. Apple Watch, Fitbit)
   7. Using internet connected 'smart home' devices (e.g. smart lighting, video surveillance)
   8. Selling products online (e.g. via eBay, Gumtree, Facebook Marketplace)
   9. Paying bills or sending / receiving money via online payment systems
   10. Accessing government services online (e.g. MyGov, Medicare)
   11. Managing investments online
   12. Using a virtual assistant (e.g. Amazon's Alexa, Apple's Siri or Google Assistant)
   13. Using generative AI tools (e.g. ChatGPT, Bard, DALL-E)
   14. Interacting with other players while gaming online
   15. Online dating
   16. None of these / Don't avoid any online activities because of online security concerns **<ANCHOR> <EXCLUSIVE>**

Q27. Are there any online activities that your business actively **avoids** due to fears or concerns about online security?

RANDOMISE ITEMS A TO N. ANCHOR O, MAKE P EXCLUSIVE. 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. Online banking
- N. Allowing staff to work remotely
- O. Something else (please specify) **<SPECIFY>**
- P. None of these / Don't avoid any online activities because of online security concerns **<ANCHOR> <EXCLUSIVE>**

Q28. Which of the following do you think would be most helpful to strengthen your online security?
Please select up to five (5) things that you would find most helpful.

RANDOMISE 1-12. MULTIPLE RESPONSE (MAX 5)

1. Update settings to restrict certain content
2. Enable automatic updates on your devices
3. Enable ransomware protection on your devices
4. Avoid saving passwords in your device or web browser
5. Avoid saving credit card details in your device or web browser
6. Change passwords more regularly
7. Use more complex passwords
8. Avoid using the same password for multiple sites or accounts
9. Avoid connecting to public Wi-Fi (e.g. at shopping centres or airports)
10. Delete or deactivate online accounts you no longer use
11. Use an adblocker to block tracking pixels
12. Increase privacy settings on social media accounts
13. Don't know **<ANCHOR> <EXCLUSIVE>**

Q29. Have you done any of the following in the past 12 months?
Please select all that apply.

RANDOMISE 1-12. MULTIPLE RESPONSE

1. Update settings to restrict certain content
2. Enable automatic updates on your devices
3. Enable ransomware protection on your devices
4. Avoid saving passwords in your device or web browser
5. Avoid saving credit card details in your device or web browser
6. Change passwords more regularly

7. Use more complex passwords
8. Avoid using the same password for multiple sites or accounts
9. Avoid connecting to public Wi-Fi (e.g. at shopping centres or airports)
10. Delete or deactivate online accounts you no longer use
11. Use an adblocker to block tracking pixels
12. Increase privacy settings on social media accounts
13. None of these **<ANCHOR> <EXCLUSIVE>**

Q30. In the past year, have you received a notification that…?
Please select all that apply.

1	2	99
Yes	No	Don't know

1. A password of yours had been compromised in a data leak
2. Your personal data had been compromised in a data leak

Q31. **[IF RECEIVED NOTIFICATION OF DATA BREACH]** What did you do after you received the notification? **[IF DID NOT RECEIVE NOTIFICATION OF DATA BREACH]** What would you do if you received a notification that a password or personal data had been compromised in a data leak?
Please select all that apply.

RANDOMISE 1-8. MULTIPLE RESPONSE

1. Change password for the site or account affected by the data leak
2. Change passwords for other sites or accounts
3. Cancel or deactivate the affected account
4. Switch to another provider
5. Check details to decide what action I needed to take
6. Contact the company to find out more
7. Contact the company to complain
8. Upgrade virus protection or security software on my devices
9. Something else (please specify)
10. Nothing / Would not do anything **<ANCHOR> <EXCLUSIVE>**

Q32. How concerned would you be if you received a notification that a **password** of yours had been compromised in a data leak?
1. Not at all concerned
2. Not very concerned
3. Somewhat concerned
4. Quite concerned
5. Very concerned

Q33. How concerned would you be if you received a notification that your **personal data** had been compromised in a data leak?
1. Not at all concerned
2. Not very concerned
3. Somewhat concerned
4. Quite concerned
5. Very concerned

Section 3: Digital Identification

QS3INTRONEW25. The next set of questions ask about digital identification.

Q34. How much do you know about **digital identity verification** (often referred to as Digital ID)? *Don't worry about looking it up if you're not sure – we'll give you some info in the next question.*

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 some 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**

NEW IN 2025

NEW SCREEN

Digital ID in Australia refers to a secure and streamlined system that allows individuals and businesses to verify their identity online when accessing government and private sector services.

You can set up a Digital ID via an accredited provider such as myID (previously known as myGovID) and use your Digital ID to prove who you are without having to provide physical documents.

Digital ID aims to enhance convenience, and security by reducing the need to share personally identifiable information. Note that a digital driver's licence is not a Digital ID.

Q35. Do you currently have a Digital ID set up?

1. Yes
2. No
3. Not sure

Q36. Which one of those uses has been most valuable or helpful to you?

ASK THOSE WHO HAVE A DIGITAL ID. SINGLE RESPONSE. RANDOMISE 1-3.

1. Proof of identity online (i.e. when opening an account)
2. Proof of identity in person (i.e. collecting mail/goods from post office)
3. To access government services online (i.e. Centrelink)
4. None of the above

Q37. Which of these ways of using a Digital ID do you think would be relevant / useful to you?
Please select all relevant responses.

ASK THOSE WHO DO NOT HAVE DIGITAL ID. MULTI RESPONSE. RANDOMISE 1-3

1. Proof of identity online (i.e. when opening an account)
2. Proof of identity in person (i.e. collecting mail/goods from post office)
3. To access government services online (i.e. Centrelink)
4. None of the above

ASK ALL

Q38. How much do you agree or disagree with the following statements about Digital ID?

RANDOMISE STATEMENTS

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

   A. Digital ID systems should be voluntary, not compulsory
   B. I would feel that my privacy is more secure using a Digital ID instead of providing copies of personal documents
   C. Using a Digital ID would be a more convenient way of accessing government services
   D. Using a Digital ID would be more convenient when submitting applications or opening accounts
   E. Digital ID can make your life easier overall
   F. I worry that my personal information could be hacked or stolen through Digital ID
   G. I worry that my personal information could be used for other unintended purposes through Digital ID
   H. Digital ID providers must be regulated and held accountable for any privacy breaches that occur

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Q39. How interested are you in setting up a Digital ID?

ASK THOSE WHO DO NOT HAVE A DIGITAL ID

1. Not at all interested
2. Not very interested
3. Somewhat interested
4. Quite interested
5. Very interested

Q40. Why have you not set up a Digital ID?
     Please select all reasons that apply.

ASK THOSE WHO ARE INTERESTED BUT DO NOT HAVE A DIGITAL ID
RANDOMISE. MULTIPLE RESPONSE

1. I didn't know about it before today
2. I am unsure how to set it up
3. The set up process is too difficult
4. I don't want to pay for a Digital ID
5. I don't think I need a Digital ID
6. I am concerned about the security of my personal information
7. Another reason (please specify)

ASK ALL

Q41. Now a question about **facial recognition technology**.

How **comfortable** are you with facial recognition technology being used in public places (e.g. shops, public transport, entertainment venues) as a tool to identify people and analyse their behaviours?

1. Not at all comfortable
2. Not very comfortable
3. Somewhat comfortable
4. Quite comfortable
5. Very comfortable

Section 4: Digital skills

QINTROS3. Now some questions about your interest in, and ability with, a range of digital skills.
ASK ALL. CONSUMER: ASK ONLY IF NOT RETIRED

Q42. 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

1. Coding and programming (e.g. Python, Java)
2. Data analytics (e.g. R, SQL)
3. Online collaboration tools (e.g. SharePoint, Trello)
4. Website development and maintenance
5. Digital marketing
6. Maintaining a social media presence
7. Artificial Intelligence (AI) (e.g. ChatGPT, Copilot) and Machine Learning
8. Data visualisation
9. Using Customer Relationship Management (CRM) software (e.g. Salesforce, HubSpot)
10. Digital photo editing and/or video production
11. 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

Q43. 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

1. Coding and programming (e.g. Python, Java)
2. Data analytics (e.g. R, SQL)
3. Online collaboration tools (e.g. SharePoint, Trello)
4. Website development and maintenance
5. Digital marketing
6. Maintaining a social media presence
7. Artificial Intelligence (AI) (e.g. ChatGPT, Copilot) and/or Machine Learning
8. Data visualisation
9. Customer Relationship Management (CRM) software (e.g. Salesforce, HubSpot)
10. Digital photo editing and/or video production
11. Cyber security skills (e.g. data security, secure app development, cloud and network security, cyber threat intelligence, incident response, risk management, security compliance)

ASK CONSUMER: ASK ONLY IF NOT RETIRED

Q44. How interested would you be to develop skills and/or work in the following types of roles?

RANDOMISE

Not at all interested	Not very interested	Somewhat interested	Quite interested	Very interested
1	2	3	4	5

A. Web and app development
B. Data science
C. User experience design
D. IT support
E. Software engineering
F. Network and systems administration
G. Cybersecurity analyst
H. AI engineering

ASK <mark>CONSUMER: ASK ONLY IF NOT RETIRED</mark>

Q45. Here are some things people have said about working in technology and IT roles. How much do you personally agree or disagree with each statement?

RANDOMISE A-J

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

A. I don't have the required technical skills
B. I believe it would be too monotonous
C. I don't fit the norm of a typical 'IT worker'
D. I wouldn't fit in with the workplace culture
E. There are a lack of role models or mentors who I can look to four guidance and support
F. The IT / technology sector is too male-dominated
G. There's already enough IT / technology workers out there
H. I'm not interested in working in IT / technology
I. Technology moves too quickly and it is too difficult to keep pace with changes
J. The IT field is more competitive and better paid outside Australia

<mark>ASK CONSUMERS ONLY</mark>

Q46. Following are some statements about **women in technology and IT**. Please indicate the extent to which you agree or disagree with each statement.
Please select one answer for each statement

RANDOMISE A-G

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

A. Online platforms and technologies would better meet my needs if more women were involved in development
B. There should be more women working in online and IT-related roles because diverse perspectives are crucial for innovation and problem solving
C. Seeing women working in senior IT roles would inspire more women to pursue careers in technology
D. There is not enough support in Australia for women or girls who want to study technology
E. There is not enough support in Australia for women who want a career in the technology sector
F. Societal norms and expectations in Australia prevent women from entering the technology sector
G. Women are generally not that interested in IT-related roles

Section 5: Artificial Intelligence (AI)

Qintroai. Now there are some questions about artificial intelligence (AI).

Q47. How much do you **know** about artificial intelligence (AI)?
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 some 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

Q48. How much do you agree or disagree with the following statements about artificial intelligence (AI) (e.g. ChatGPT, Copilot)?

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) delivers positive **social** outcomes
- B. Artificial intelligence (AI) delivers 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 <**CONSUMER** 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>
- I. I trust the information provided by artificial intelligence (AI) platforms is accurate and reliable
- J. I would be able to identify text or images that have been created by artificial intelligence (AI)

Q49. 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. MULTIPLE RESPONSE

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. Microsoft 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 would otherwise have to be done manually
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>**

Q50 AND Q51 CONSUMER ONLY

Q50. How much are you using artificial intelligence (AI), if at all?		
In your personal life	**SHOW IF EMPLOYED** In your workplace	**SHOW IF STUDENT** In your studies
A	B	C

1. Use it regularly
2. Use it occasionally
3. Used it once or tried using it
4. Thinking about using it
5. **[SHOW ONLY IF 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 IF EMPLOYED UNDER 'IN YOUR WORKPLACE']** I'm unsure if my workplace is using it
8. Never / not thinking about using it

Q51. How often do you use artificial intelligence (AI) in your… **ONLY ASK THOSE WHO USE AI REGULARLY OR OCCASIONALLY**		
In your personal life	**SHOW IF EMPLOYED** In your workplace	**SHOW IF STUDENT** In your studies
A	B	C

1. Every day
2. Most days
3. About once a week
4. A few times a month
5. Once a month
6. Less often

Q52 AND Q53 SMALL BUSINESS ONLY

Q52. 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

Q53. How often does your business use AI? **ONLY ASK THOSE WHO USE AI REGULARLY OR OCCASIONALLY**

1. Every day
2. Most days
3. About once a week
4. A few times a month
5. Once a month
6. Less often

ASK ALL WHO USE AI REGULARLY OR OCCASIONALLY

Q54. To what extent has your use of AI led to improvement in…?

RANDOMISE A-E

No improvement	Not much improvement	Some improvement	Moderate improvement	Big improvement
1	2	3	4	5

- A. Productivity
- B. Time saving
- C. Quality of your work
- D. Creativity and idea generation
- E. Problem solving

Q55. AI platforms such as ChatGPT, Copilot and Meta AI learn from existing information to help answer questions or solve problems. The next question is about the data used to train AI models.

Which, if any, of your personal data and online activities do you think is used to train AI algorithms? *Select all that you think apply.*

RANDOMISE 1-7, ANCHOR 8-10, 9-10 EXCLUSIVE

1. Your search engine history
2. Content that you have viewed or streamed
3. Your emails
4. Your messages on instant messaging platforms
5. Your online purchases
6. Your browsing history
7. Your posts or comments
8. Something else (please specify) **SPECIFY**
9. None of the above
10. Not sure

Q56. To what extent do you modify or limit your online activity (i.e. using search engines, posting content or comments online) due to concern that this information might be used to train AI algorithms?

Not at all	Not much	A little	A fair bit	A lot
1	2	3	4	5

Q57. How much do you agree or disagree with the following statements about the data used to train artificial intelligence (AI) models?

RANDOMISE STATEMENTS

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

- A. I am comfortable for my deidentified personal data and online activity to be used to train AI models
- B. I trust that companies using my data to train AI models have appropriate safeguards in place
- C. I would like to be able to control what personal data and online activity of mine is used to train AI models

D. It's important for people to allow their deidentified data to be used to train AI models, so that AI models and tools can cater for all types of people, not just those who agree to it

Q58. AI platforms and other internet-enabled technologies (such as email and cloud storage) depend on electricity and other resources (such as water for cooling systems in data centres) resulting in carbon emissions. How concerned are you about the **environmental impacts** associated with your use of AI and other internet enabled technologies?
1. Not at all concerned 2. Not very concerned 3. Somewhat concerned 4. Quite concerned 5. Very concerned

Q59. Overall, how do you feel about advances in artificial intelligence (AI) compared to a year ago? Would you say you are…?
1. A lot more negative 2. A little more negative 3. About the same 4. A little more positive 5. A lot more positive