

METHODOLOGY DISCLOSURE STATEMENT

Client name	.au Domain Administration (auDA)
Project name	Digital Lives 2023 - Readiness for emerging technologies
Project reference	SNR 2302017 / AUDA003

Research dates:	July 20-28, 2023
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=407 small business owners or managers. Average survey length was approximately 12 minutes. Survey participants were sourced via a commercial research panel and rewarded with points upon completion. Participation was on a voluntary, opt-in basis.
Weighting approach:	<p>The sample was weighted to match ABS Census population data, using a rim weighting technique. 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 72%, equating to a margin of error of approximately +/-3.0% (at the 95% confidence interval). For small businesses, the total effective sample size after weighting was approximately 65%, equating to a margin of error of approximately +/-6.0%</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: The next few questions are about your use of the internet and online activities. 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 confident2. Somewhat confident3. Neither confident nor unconfident <SKIP Q2>4. Somewhat unconfident5. Very unconfident

Q2.	Why do you say you are <Q1 RATING> using the internet? <i>Please be as detailed as possible in your response.</i>
OPEN TEXT	

Q3.	CONSUMER: Thinking about all aspects of your life, how important would you say the internet is to you? SMALL BUSINESS: Thinking about all aspects of your business, how important would you say the internet is to the business?
	<ol style="list-style-type: none">1. Very important2. Somewhat important3. Neither important nor unimportant4. Somewhat unimportant5. Very unimportant

CONSUMER ONLY

Q4.	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 it2. The internet adds a lot of value to my life and I couldn't imagine life without it3. The internet adds some value but I could live without it4. The internet doesn't add value to my life, I don't need it

SMALL BUSINESS ONLY

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

CONSUMER ONLY. ASK IF CURRENTLY WORKING (S9=1-4)

Q6.	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

Data Quality Check

Q7.	REDACTED

Section 2: Emerging digital skills

The next set of questions relate to various internet-enabled technologies, including **artificial intelligence, virtual and augmented reality, blockchain**, and **robotics**. It doesn't matter how much or how little you know about these technologies, or if you have used them or not. Please answer each question to the best of your ability - your general impressions are fine.

Q8.	Firstly, how much do you know about each of these technologies? <i>Please select the option that best describes you.</i>
RANDOMISE	
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

NEW SCREEN

You will now be shown some information about each of these technologies. Please take a moment to read this information before proceeding.

Artificial intelligence, or AI, refers to the ability of machines or computer systems to mimic human intelligence and undertake complex tasks such as recognise images, understand natural language and learn from experience. This allows AI systems to recognise patterns, make predictions and deductions, and adapt to new information without being explicitly programmed for each specific task.

AI is present in many aspects of everyday lives such as customer service chatbots, predictive text for emails, targeted ads and products for e-commerce customers, smart assistants like Google Home, Alexa, Siri, Apple FaceID and live captions on television. Even social media and music and video streaming platforms use AI to personalise and curate the content users see in their feeds.

Augmented reality is a technology built to 'extend reality', allowing users to experience the real world with interactive digital elements. This is achieved through a device such as a phone, tablet, headset or glasses layering digital images over the world you see around you. 'Pokemon GO' was a popular early example of this, but there are many other applications for personal and business use these days, such as Google's Translate app that detects and translates text in images and video, and warehouses can use it to make product picking, packing and inventory management more efficient.

Virtual reality immerses you in virtual worlds or spaces through the use of a headset and a screen displaying the virtual environment. These headsets also use a technology called head tracking, which allows you to look around the environment by physically moving your head. The display will follow whichever direction you move, giving you a 360-degree view of the virtual environment.

The **metaverse** refers to a virtual reality space where people can interact with each other and digital objects in a shared, immersive environment. It's like a virtual universe that combines elements of augmented reality, virtual reality, and the internet. Users create digital representations of themselves called avatars and explore these virtual worlds through virtual reality headsets, computers, or other devices. They can socialise, work, play games, attend events, shop, buy real estate in the virtual world, learn, and engage in various activities such as attending meetings, conferences or concerts, just as they might in the physical world, but in a digital environment.

Blockchain is like a digital ledger that securely records information and transactions in a transparent way. What makes it unique is that it doesn't rely on a single authority; instead, many computers work together to keep the records accurate and reliable. The information is stored in 'blocks' that are connected in a chain, forming an unchangeable history. Blockchain can track and trade virtually anything, whether they are physical items (a house, car, cash, land), or intangible assets (intellectual property, copyrights, art). Common examples of this technology include cryptocurrency (i.e. Bitcoin, Ethereum) and non-fungible tokens (NFTs). The decentralised nature of blockchain ensures that no single person or organisation controls the data, making the system transparent, secure, and resistant to tampering.

Robotics is the intersection of science, engineering and technology that produces machines called robots, that replicate or substitute human actions. Robots contain at least some level of computer programming; without a set of code telling it what to do, a robot would just be another piece of simple machinery. Inserting a program into a robot gives it the ability to know when and how to carry out a task. They can be found in a range of settings including customer service in restaurants or hotels, undertaking manual tasks in factories and assembly lines, exploring the planet's harshest conditions, assisting law enforcement, or supporting surgical procedures.

Q9. Following are some ways in which **<artificial intelligence/augmented reality, virtual reality and the metaverse/blockchain/robotics>** can be used. Please indicate which, if any, of the activities **<CONSUMER: you have personally / SMALL BUSINESS: the business has>** done before today?

DISPLAY ALL USE CASES RELEVANT TO SEGMENT. RANDOMISE

1. **Yes**, **<CONSUMER: I have / SMALL BUSINESS: the business has>** done this before - more than once
2. **Yes**, **<CONSUMER: I have / SMALL BUSINESS: the business has>** done this before - once only
3. **No**, I have heard of this, but I have not tried it **<SMALL BUSINESS: for the business>**
4. **No**, I have not heard of this before

ASK IF ANY USE CASES AT Q9 = 1, USED MORE THAN ONCE

Q10. Approximately, how **often** **<CONSUMER: do you / SMALL BUSINESS: does the business>** use these technologies?

DISPLAY ALL USE CASES RELEVANT TO SEGMENT.

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

Q11. **CONSUMER:** Next, please indicate your level of **ability** with each of these activities?
SMALL BUSINESS: Next, please indicate the level of **ability** within the business for each of these activities?

DISPLAY USE CASES CODED 1-2 AT Q9

1. **Beginner** - Need a lot of guidance
2. **Intermediate** - Need some guidance
3. **Advanced** - Mostly self-sufficient / Need minimal guidance only
4. **Expert** - Fully self-sufficient / Do not need any guidance

Q12 TO Q19 CONSUMER SAMPLE ONLY

Q12. Please indicate which, if any, of these activities you believe are, or would be, **useful** to you *specifically* in your **personal** life*, whether you've used them before or not?

Please select all that apply or select 'None'.

DISPLAY IF WORKING (S9=1-4) *Note: This is not about what might be useful for you at work - we have a separate question for that.

DISPLAY ALL USE CASES RELEVANT TO SEGMENT. RANDOMISE

97. None

Q13. Now please select **up to three** of these activities that you believe would be **most useful** to you in your **personal life**.

SKIP IF Q12=97 (None)
DISPLAY USE CASES SELECTED AT Q12
AUTOFILL AND SKIP IF <=3 USE CASES SELECTED AT Q12

Q14. In what ways do you feel these activities would be useful to you in your **personal life**? What would be the **main benefits** to you? *Please select all that apply from the list below, or feel free to suggest other benefits by selecting "Something else" and typing in what other use or benefits the activity has for you.*

DISPLAY AS CAROUSEL WITH USE CASES SELECTED AT Q13 WITH OPTIONS:

1. **Efficiency** - to save time or effort
2. **Financial** - to make or save money
3. **Recreation** - for fun and entertainment
4. **Relaxation** - to unwind or feel calm
5. **Connection** - to interact or communicate with others
6. **Learning** - to improve knowledge and understanding
7. **Inspiration** - to prompt new ideas
8. **Organisation** - to manage administrative tasks
9. **Security** - to feel peace of mind
10. **Convenience** - to make things easier
11. **Quality** - for better outcomes or experiences
96. Something else **SPECIFY**

Q15. What, if any, **concerns** do you have in relation to these activities? What are the main reasons that might prevent you from doing this activity in your **personal life**? *Please select all that apply from the list below, or feel free to suggest other concerns by selecting "Something else" and typing in your concern.*

DISPLAY AS CAROUSEL WITH USE CASES SELECTED AT Q13 WITH OPTIONS:

1. Too expensive to acquire or use
2. I don't have access to this
3. May contain inaccurate or incorrect details
4. The quality would/could be poor
5. Would not be relevant to me
6. Worry about data security
7. Worry about privacy
8. Don't know enough about it
9. Don't know how to use it or where to seek help when using
10. Expect it would be difficult to do
11. Expect it would be very time consuming to learn how to use, or to use
12. Concern about my physical safety in using it
13. Concerns the information it provides could be discriminatory
14. Prefer to use other methods
15. Something else (please specify) **SPECIFY**
16. I have no concerns / nothing preventing me from this activity **EXCLUSIVE**

ASK IF CURRENTLY WORKING (S9=1-4)

Q16.	Now thinking about your working life ... Please indicate which, if any, of these activities you believe are, or would be, useful to you in your work life or career , whether as part of your existing work or potential future work? <i>Please select all that apply or select 'None'.</i>
DISPLAY ALL USE CASES RELEVANT TO SEGMENT	
97.	None EXCLUSIVE
Q17.	Now please select up to three of those activities that you believe would be most useful to you in your work life / career?
SKIP IF Q16=97 (None)	
DISPLAY USE CASES SELECTED AT Q16	
AUTOFILL AND SKIP IF <=3 USE CASES SELECTED AT Q16	

Q18.	In what ways do you feel these activities would be useful to you in your work life / career ? What would be the main benefits to you? <i>Please select all that apply from the list below, or feel free to suggest other benefits by selecting "Something else" and typing in what other use or benefits the activity has for you..</i>
DISPLAY AS CAROUSEL WITH USE CASES SELECTED AT Q17 WITH OPTIONS:	
<ol style="list-style-type: none"> 1. Efficiency - to save time or effort 2. Financial - to make or save money 3. Recreation - for fun and entertainment 4. Relaxation - to unwind or feel calm 5. Connection - to interact or communicate with others 6. Learning - to improve knowledge and understanding 7. Inspiration - to prompt new ideas 8. Organisation - to manage administrative tasks 9. Security - to feel peace of mind 10. Convenience - to make things easier 11. Productivity - to improve performance 12. Quality - for better outcomes or experiences 96. Something else PLEASE SPECIFY 	

Q19.	What, if any, concerns do you have in relation to these activities? What are the main reasons that might prevent you from doing this activity in your work life / career ? <i>Please select all that apply from the list below, or feel free to suggest other concerns by selecting "Something else" and typing in your concern.</i>
DISPLAY AS CAROUSEL WITH USE CASES SELECTED AT Q17 WITH OPTIONS:	
<ol style="list-style-type: none"> 1. Too expensive to acquire or use 2. I don't have access to this 3. May contain inaccurate or incorrect details 4. The quality would be poor 5. Would not be relevant to my work life/career 6. Worry about data security 7. Worry about privacy 8. Don't know enough about it 9. Don't know how to use it 10. Expect it would be difficult to do 11. Expect it would be too time consuming to learn how to use, or to use 	

- 12. Concern about my physical safety in using it
- 13. Concerns the information it provides could be discriminatory
- 14. Prefer to use other methods
- 96. Something else (please specify) **SPECIFY**
- 97. I have no concerns/ nothing preventing me from this activity **EXCLUSIVE**

Q20 TO Q24 SMALL BUSINESS SAMPLE ONLY

Q20. Please indicate which, if any, of these activities you believe are, or would be, **useful** to your business **today**, as in right now, if you were able to access it? *Please select all that apply, or select 'None'*

DISPLAY ALL USE CASES RELEVANT TO SEGMENT

97. None

Q21. Please indicate which, if any, of these activities you believe would be **useful** to your business **in the future** (i.e. in the next 3-5 years)? *Please select all that apply, or select 'None'*

DISPLAY ALL USE CASES RELEVANT TO SEGMENT

97. None

Q22. Now please select **up to three** of those activities that you believe would be **most useful** to your business, either now or in the future?

SKIP IF Q20=97 (None) AND Q21=97 (None)

DISPLAY USE CASES SELECTED AT Q20 AND Q21

AUTOFILL AND SKIP IF <=3 USE CASES SELECTED AT Q20 AND Q21

Q23. In what ways do you feel these activities would be useful? What would be the **main benefits** to the business? *Please select all that apply from the list below, or feel free to suggest other benefits by typing in the space below.*

SKIP IF Q20=97 (None) AND Q21=97 (None)
DISPLAY AS GRID WITH USE CASES SELECTED AT Q22 AS COLUMNS
RANDOMISE ROWS:

1. **Efficiency** - to save time or effort
2. **Financial** - to make or save money
3. **Connection** - to interact or communicate with others
4. **Learning** - to improve knowledge and understanding
5. **Inspiration** - to prompt new ideas
6. **Organisation** - to manage administrative tasks
7. **Security** - to feel peace of mind
8. **Convenience** - to make things easier
9. **Productivity** - to improve business performance
10. **Quality** - for better outcomes or experiences
11. **Innovation** - help create new products, services, processes, tools etc
96. Something else **SPECIFY**

Q24. What, if any, **concerns** do you have in relation to these activities? What are the main reasons that might prevent your business from undertaking this activity? *Please select all that apply from the list below, or feel free to suggest other concerns by typing in the space below.*

DISPLAY AS GRID WITH USE CASES SELECTED AT Q22 AS COLUMNS
RANDOMISE ROWS:

1. Too expensive to acquire or use
2. I don't have access to this
3. May contain inaccurate or incorrect details
4. The quality would/could be poor
5. Would not be relevant to my business
6. Worry about data security
7. Worry about privacy
8. Don't know enough about it
9. Don't know how to use it
10. Expect it would be difficult to do
11. Expect it would be too time consuming to learn how to use, or to use
12. Concern about my physical safety when using it
13. Concerns the information it provides could be discriminatory
14. Could lead to job losses
15. Prefer to use other methods
16. Something else (please specify) **SPECIFY**
17. I have no concerns **EXCLUSIVE**

Section 3: Emerging digital skills - Attitudes

The following questions ask how you feel about various issues related to these technologies. There are no right or wrong answers - simply choose the response option that best describes how you feel.

<ROTATE SECTIONS 3a TO 3d>

Section 3a: Artificial intelligence (AI) (1.5 min)

Now, a few more questions about **Artificial intelligence / AI**.

Q25. Please list below all the specific Artificial intelligence (AI) apps or tools that you can think of.
Please don't look this up - that really wouldn't help us at all! We are only interested in any you can name off the top of your head.

OPEN TEXT - DISPLAY 3 SMALL TEXT BOXES - ADD MORE IF NEEDED

97. I can't think of any

Q26. Before today, were you aware of the following Artificial intelligence (AI) apps or tools?
Please select all that you were aware of, even if only by name.

ALPHABETICAL ORDER. MULTIPLE RESPONSE

1. Adobe Firefly
2. Alexa
3. AutoGPT
4. Beautiful.ai
5. Blue
6. ChatGPT
7. Copilot
8. Cortana
9. DALL-E 2
10. Frase.io
11. Google Analytics
12. Google Assistant
13. Google Bard
14. Grammarly
15. Jasper
16. Kaiber
17. Leonardo.ai
18. Lumen5
19. Merlin
20. Microsoft Bing
21. Midjourney
22. Perplexity AI
23. Siri
24. Stable Diffusion
25. Synthesia
26. Zendesk
27. Zoho Zia
97. None of these **EXCLUSIVE**

Q27. Following are some things that have been said about Artificial intelligence (AI) . Please indicate whether you <i>agree</i> or <i>disagree</i> with each statement.						
RANDOMISE STATEMENTS	Disagree strongly	Disagree somewhat	Neither agree nor disagree	Agree somewhat	Agree strongly	Don't know
	1	2	3	4	5	99
A. Artificial intelligence (AI) is a fad that probably won't last long term B. Artificial intelligence (AI) will deliver positive social outcomes C. Artificial intelligence (AI) will deliver positive economic outcomes D. Artificial intelligence (AI) is the greatest technological advancement of our time E. Artificial intelligence (AI) will enable < CONSUMER : people to spend more time doing the things they enjoy / SMALL BUSINESS : small businesses to free up time for other important business activities> F. Artificial intelligence (AI) will replace human workers and lead to unemployment G. CONSUMER ONLY : Artificial intelligence (AI) should be banned in schools and universities to prevent plagiarism and ensure students are required to undertake critical thinking themselves H. I would feel more comfortable about artificial intelligence (AI) if there were stronger regulatory safeguards around it I. When I need service < SMALL BUSINESS : or support for 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						

NEW SCREEN

And now we have some questions about **AI for businesses**...

NEW SCREEN

Q28. Following are some things that have been suggested for businesses that use Artificial intelligence (AI) apps and tools. Please indicate how important you feel each one is.						
RANDOMISE STATEMENTS	Not at all important	Not very important	Fairly important	Very important	Extremely important	Don't know
	1	2	3	4	5	99
<ANCHOR> Businesses that use Artificial intelligence (AI) apps / tools should be required to... A. Disclose to customers and other stakeholders when and how AI is being used by the business B. Have appropriate privacy and security measures to protect personal data C. Have continuous human oversight and control D. Have appropriate measures in place to ensure ethical use of AI E. Ensure outputs from AI apps or tools have been fact checked and are accurate F. Ensure outputs from AI apps or tools are fair, ethical and unbiased						

Section 3b: Virtual and augmented reality (0.5 min)

Now, a few more questions about **virtual and augmented reality, and the metaverse**.

Q29. Following are some things that have been said about virtual and augmented reality . Please indicate whether you <i>agree</i> or <i>disagree</i> with each statement.						
RANDOMISE STATEMENTS	Disagree strongly	Disagree Somewhat	Neither agree nor disagree	Agree somewhat	Agree strongly	Don't know
	1	2	3	4	5	99
<p>A. Virtual and augmented reality is a fad that probably won't last long term</p> <p>B. Virtual and augmented reality will deliver positive social outcomes</p> <p>C. Virtual and augmented reality will deliver positive economic outcomes</p> <p>D. Virtual and augmented reality will enable people to have experiences regardless of their location or physical or mental ability</p> <p>E. CONSUMER ONLY: Virtual and augmented reality can enable greater opportunities for social interaction, especially for those who are isolated</p> <p>F. CONSUMER ONLY: Virtual and augmented reality allows people to be whoever they want to be, without judgement</p> <p>G. A possible downside of virtual and augmented reality is that it will diminish people's ability to communicate and interact with others in 'real life'</p>						

Section 3c: Blockchain (0.5 min)

Now, a few more questions about **blockchain**.

Q30. Following are some things that have been said about blockchain . Please indicate whether you <i>agree</i> or <i>disagree</i> with each statement.						
RANDOMISE STATEMENTS	Disagree strongly	Disagree Somewhat	Neither agree nor disagree	Agree somewhat	Agree strongly	Don't know
	1	2	3	4	5	99
<p>A. Blockchain is a fad that probably won't last long term</p> <p>B. Blockchain will deliver positive social outcomes</p> <p>C. Blockchain will deliver positive economic outcomes</p> <p>D. Using blockchain to store and transfer data would give me a greater sense of security compared to traditional methods</p> <p>E. I would feel more comfortable about blockchain if there were stronger regulatory safeguards around it</p> <p>F. Blockchain gives power and control back to individuals</p>						

Section 3d: Robotics (0.5 min)

Now, a few more questions about **robotics**.

Q31. Following are some things that have been said about robotics . Please indicate whether you <i>agree</i> or <i>disagree</i> with each statement.						
RANDOMISE STATEMENTS	Disagree strongly	Disagree Somewhat	Neither agree nor disagree	Agree somewhat	Agree strongly	Don't know
	1	2	3	4	5	99

- A. Robotics are a gimmick that probably won't last long term
- B. Robotics will have, on balance, a positive impact on society
- C. Robotics will enable <**CONSUMER:** people to spend more time doing the things they enjoy / **SMALL BUSINESS:** small businesses to free up time for other important business activities that cannot be automated>
- D. Robotics will enable people and businesses to achieve things that were previously impossible
- E. Robotics will enable businesses to achieve greater efficiency than is possible with human workers
- F. Robotics are good but will never fully replace humans

Thank you for participating in this survey. We appreciate your time and contribution.