



ASCI

ASIAL Australian Security Confidence Index 2022 Report

Angela Carter

Director of Consumer Insights

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Executive summary

Key results from the annual ASIAL ASCI research

Key results

Overall safety: Overall safety perceptions have remained very similar to 2021 with only 6% of Australians feeling unsafe overall (5% in 2021). Those who identify as being of Indian ethnic background remain significantly more likely to feel unsafe. This year they are joined by females aged 40-54, those who reside in CBD/cities, those looking for employment or working in hospitality.

We still see only 1 in 5 Australians feeling *very safe* in their day to day lives, with many being acutely aware of situations and activities that could put them at risk.

Covid-19 has also remained at the forefront of Australians lives and has impacted their safety perceptions. Feeling unable to control the Covid-19 situation has potentially heightened awareness of other aspects of life that can't be controlled e.g. cyber attacks and assaults.

In a clear juxtaposition, having more people around used to cue safety, now it is a danger due to Covid-19. The fear from Covid is greater than last year rising to the #4 reason for feeling unsafe, compared to #9 last year.

During daylight OR night-time hours:

More than half (56%) of Australians feel unsafe during daylight OR night-time hours. Over a third of Australians (38%) feel unsafe at any point doing day to day activities during daylight hours. This rises to just over half (51%) when doing these same activities after dark.

The activities we now feel significantly more unsafe doing during the day are ones where we are likely to be around crowds - bars and restaurants and local parks and sportsgrounds - another link with Covid.

During the night we now feel significantly more unsafe going to the doctors or hospitals - again the threat of catching covid has heightened this feeling.

Australians feel most unsafe during the day going to the cinema/ theatre (17%), using licensed taxis (15%), and public transport (15%). The rise in feeling unsafe at the cinema/theatre is again linked to the risk of being in enclosed areas with crowds.

When it comes to activities during the night, Australians feel most unsafe using public transport (32%), being at local parks/sportsgrounds (29%) and, new to the top 3, being in the CBD (26%).

Using *public transport* is a concern both day and night, being in the top three in both situations. Feelings of being unsafe on public transport is significantly higher among females, and is predominantly centered around physical safety concerns.

Feelings of being unsafe in certain circumstances are higher, or increasing, in WA and it should be noted that at the time of this research WA was starting to see its first significant outbreak of Covid-19 since the start of the pandemic in March 2020.

Executive summary

Key results from the annual ASIAL ASCI research

Key results regarding living in Australia

There has been a significant increase in the number of Australians that feel unsafe living in Australia from the risks of cyber or terrorist attacks, robbery or assaults (44% up from 38% in 2021). Significant increases are noted among females, the over 40's, NSW/ACT and WA residents, those living in metro centres, hospitality workers, less affluent Australians, and those living in single person households.

Australians are most concerned about cyber attacks (30%), followed by robbery (23%) and physical assault (22%). As many as 21% are concerned about sexual assault and 18% fear terrorist attacks on Australian soil.

Feeling unsafe about the possibility of these occurring has increased for all, and significantly so for Cyber attacks (up from 24% in 2021) and sexual assault (up from 18% in 2021)

Cyber attacks (30%): Fear of cyber attacks is significantly higher among females and hospitality workers. The significant growth in this as a concern is being driven by females, NSW/ACT and WA residents, those not working and in lower income households.

Robbery (23%): Fear of robbery is significantly higher among females and younger Australians aged 18-24. Concern about robberies has increased from 21% in 2021, and has increased significantly for WA residents - now up to 29% from 19% in 2021.

Physical assault (22%): Feelings of being unsafe from physical assaults has also increased from 19% in 2021. Females, those aged 18-24 and students are significantly more likely to feel at risk.

Sexual assault (21%): This is higher among females, students and hospitality workers. The significant growth in this as a concern has been driven by NSW/ACT residents and those living in metro areas.

Terrorist attacks (18%): Feeling unsafe from terrorist attacks has increased from 15% of the population in 2021. Females and young Australians aged 18-24 are significantly more likely than the population to cite this as a concern. Additionally, there has been significant growth in this as a concern for young Australians and QLD residents. Now almost a quarter of young Australians feel unsafe from terrorist attacks (24% up from 13% in 2021) and almost 1 in 5 QLD residents feel unsafe (19% up from 12% in 2021).

Executive summary

Key results from the annual ASIAL ASCI research

Key results regarding cyber and online security

The pandemic has changed the lives of all Australians. While online shopping was already increasing, the pandemic has accelerated this growth. The ability get our food and non-food items delivered to our houses has in some way mitigated the threat of catching Covid-19, but the threat to our digital security has increased.

Significantly more Australians feel unsafe from the risk of **cyber attacks**. Personal cyber security concerns have increased from 41% to 43%, however our level of concern whilst using our employers IT has remained unchanged at 41% of Australians.

Key concerns are around shopping from foreign retailers, global retailers and using social media, with these being consistently a concern whether using personal or workplace IT.

Personal cyber and online security:

Australian retailers are perceived as being the safest place to shop, whilst our fear of using foreign retailers has increased significantly. Now almost a third of Australians feel unsafe when using foreign retailers (32%).

Older Australians and females remain more likely to be concerned about using foreign retailers. However, there has been significant growth in concern about these retailers coming from younger males, affluent Australians, those in managerial or executive positions, full time workers and Victorians (our most locked down state).

Work-based situations: Across all situations, except for shopping online from foreign or global retailers, safety concerns remain higher when using company IT.

The top concerns are shopping from foreign retailers (24%), using social media (23%) using work emails for private conversations (21%). The concerns tend not to be for the employer's cyber security, but more around being aware that their digital footprint can be, and is, monitored by Australian employers.

The ASIAL ASCI Index Explained

The ASIAL ASCI research uses a 7-point Likert Scale, where 1 means *Very unsafe* and 7 means *Very safe*.

A nationally representative sample of Australians were asked about a range of situations and then asked:

Overall, thinking about your day to day life, how safe do you feel?

Feels unsafe = bottom 3 box (i.e. responded 1-3)

Neutral = 4

Feels safe = top 3 box (i.e. responded 5-7)





ASCI

Overall results



**Only 1 in 5
Australians feel *very*
safe in their day to
day lives**



**And 6% of Australians
feel unsafe...**

Overall safety index is stable into 2022

While 83% of Australians generally feel safe, there are certainly times when this is not the case, and their concerns are consistent with those who generally feel unsafe

Overall safety



"Night-time hours while walking because I cannot trust the people in my town."

"Just don't have faith in privacy and the internet."

"Online activities are fairly exposed like it or not with social media. Foreign online retailers, would find hard not to cast concerns, your local government might not be able to provide legal online protections, etc."

"I would feel more unsafe being in a local park or sports ground at night just because most homeless people in the area tend you spend the night there."

"Generally being out and about, other people due to high covid-19 numbers."

"Walking down the street at night because I don't know who is around and what their intentions are."

"I don't use public transport in general, but I wouldn't feel safe using it. With Covid I would feel too susceptible to being infected. I think these days you also can't trust people to respect you and you never know who may get off at the same place you do so they can attack or rob you."

"Where I live, we have a very high rate of crime and if you want to walk at night look out you don't get killed, all of the above situations are bad so I can't put just one."

"Due to covid I don't feel safe at restaurants and cinemas in daylight or night-time hours. No lighting or minimal lighting at local parks - so don't feel safe and would never walk on my own during night-time hours."

"Walking local streets. Lots of people who are intoxicated around and potentially can make poor decisions."

QA4. Overall, thinking about your day to day life, how safe do you feel? Base: All respondents n=1604

QA5. You indicated you don't feel very safe at the following time(s) in your day to day life. In what situations do you feel most unsafe and why? Base: Respondents who feel unsafe at any time n=1086

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Overall safety index

While only 6% feel unsafe, this is significantly higher among certain cohorts, with those identifying as from an Indian ethnic background remaining significantly more likely to feel unsafe

Overall safety



△ **9% Reside in the City/ CBD**

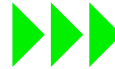
△ **13% Females aged 40-54**

△ **11% Looking for employment**

△ **12% Working in hospitality industry**

△ **14% Identify as Indian**

Top 10 situations where Australians feel unsafe in their day-to-day lives



1. Night-time/ Dark (#1)
2. In public areas/ parks or sportsgrounds/ bars or restaurants/ cinemas (#3)
3. Walking my local streets (#4)
4. Fear of catching Covid/ corona virus (#9)
5. Being alone/out alone (#6)
6. Antisocial/ suspicious people around/ groups of youths (#5)
7. Online cyber security risk (identity theft/hacking) (#10)
8. Public transport/ buses/ trains/ ferries (#8)
9. Online/ social media (#2) ↓
10. In the Central city/ CBD/ Main Street/ shopping malls (-)

(Top 10 ranking in 2021)

↓ Significantly lower vs. 2021

↑ Significantly higher vs. 2021



Personal Safety

**During day and night, in
the workplace and online**

Australians are most likely to feel unsafe at night, although this has reduced slightly in 2022



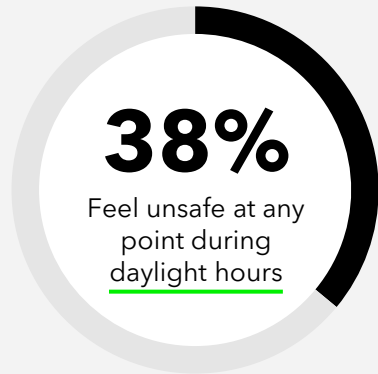
Note. Feel unsafe is based on bottom 3 box on a 7-point scale, where 1 indicates Very unsafe and 7 indicates Very safe

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More than 1 in 3 feel unsafe going about their daily lives

Around 1 in 7 fear using taxis, public transport or going to the cinema during the day. Due to Covid-19, going to the Cinemas/theatre is now the activity Australians feel most unsafe doing during the day

Top 3 situations



▶ **17%**

Going to cinemas/ theatres

"Going to cinemas right now with large crowds and the Covid virus makes me hesitant."

Female 50-54 QLD

▶ **15%**

Using licenced taxis

"Many Taxi drivers lack respect for women and drive unsafely."

Female 55+ VIC

▶ **15%**

Using public transport
e.g. trains, buses or ferries

"Catching public transport as there is no security on them - druggies, drunks and racists use public transport and it's just not a safe when they are going nuts and there is no police or security."

Female 40-54 SA/NT

QA1A. How safe do you feel in these situations: A) During daylight hours?

Base: All respondents n=1604. Situations based on all respondents excluding those who answered Not applicable (minimum n=1343)

Note. Feel unsafe is based on bottom 3 box on a 7-point scale, where 1 indicates Very unsafe and 7 indicates Very safe

More than 1 in 3 feel unsafe going about their daily lives

Safety perceptions differ among demographic groups based on gender, age, region and employment

Returning to pre-Covid routines may explain the significant increase in safety fears of going to restaurants/bars and being at parks and sportsgrounds



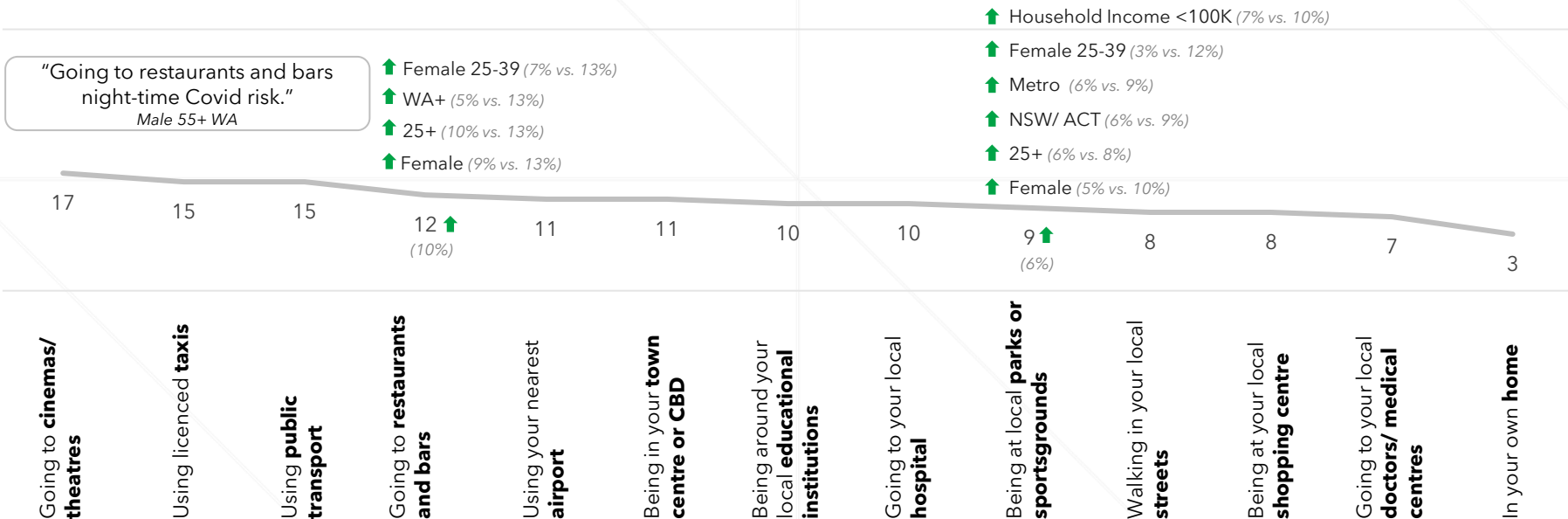
QA1A. How safe do you feel in these situations: A) During daylight hours?

Base: All respondents n=1604. Situations based on all respondents excluding those who answered Not applicable (minimum n=1343)

Note. Feel unsafe is based on bottom 3 box on a 7-point scale, where 1 indicates Very unsafe and 7 indicates Very safe

Females, particularly aged 25-39, are driving increased safety fears

Marked increase in WA for going to bars and restaurants could be Covid related as the states case numbers started to spike during this research



QA1A. How safe do you feel in these situations: A) During daylight hours?
 Base: All respondents n=1604. Situations based on all respondents excluding those who answered Not applicable (minimum n=1343)
 Note. Feel unsafe is based on bottom 3 box on a 7-point scale, where 1 indicates Very unsafe and 7 indicates Very safe

Significantly higher vs. 2021
 Significant deviation compared to Total at a 95% Confidence Interval

Fear levels rise to just over half when considering these activities at night

Public transport remains the key issue with being in town centres/CBD rising in the ranking

Top 3 situations



▶ **32%**
Using public transport
e.g. trains, buses or ferries

"Using public transport at night. I've had bad experiences where I've been mugged and had someone expose themselves to me on public transport."
Female 25-39 NSW

▶ **29%**
Being at local parks
or sportsgrounds

"I would never go to my local parks or sportsgrounds at night because I can be in immediate physical danger."
Male 25-39 VIC

▶ **26%**
Being in your town
centre or CBD

"Too many dodgy characters hanging around in the CBD during night hours."
Male 18-24 QLD

Over half feel unsafe at any time during the night

With females showing heightened safety perception levels on almost all activities

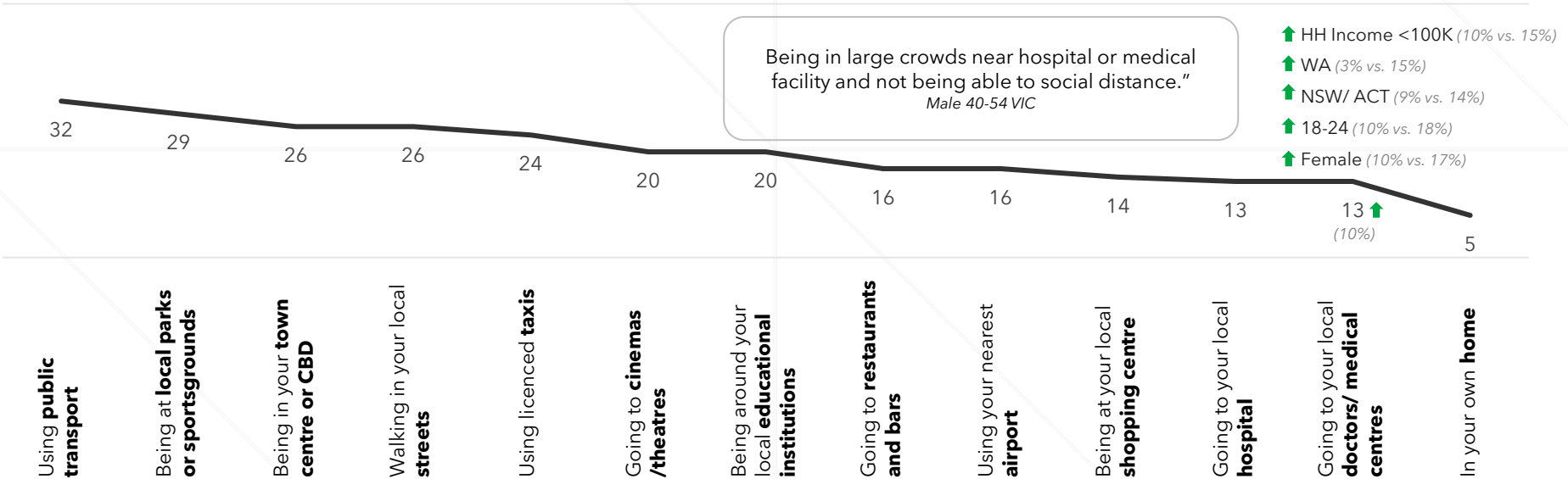


QA1B. How safe do you feel in these situations: B) During night-time hours?
 Base: All respondents n=1604. Situations based on all respondents excluding those who answered Not applicable (minimum n=1298)
 Note. Feel unsafe is based on bottom 3 box on a 7-point scale, where 1 indicates Very unsafe and 7 indicates Very safe

Significantly higher vs. 2021
 Significant deviation compared to Total at a 95% Confidence Interval

Going to doctors or medical centres at night is now more of a concern

With gender, age, income and regional factors heightening safety fears. Analysis of verbatim reasons for feeling unsafe show a large impact being made by Covid-19.



QA1B. How safe do you feel in these situations: B) During night-time hours
Base: All respondents n=1604. Situations based on all respondents excluding those who answered Not applicable (minimum n=1298)
Note. Feel unsafe is based on bottom 3 box on a 7-point scale, where 1 indicates Very unsafe and 7 indicates Very safe

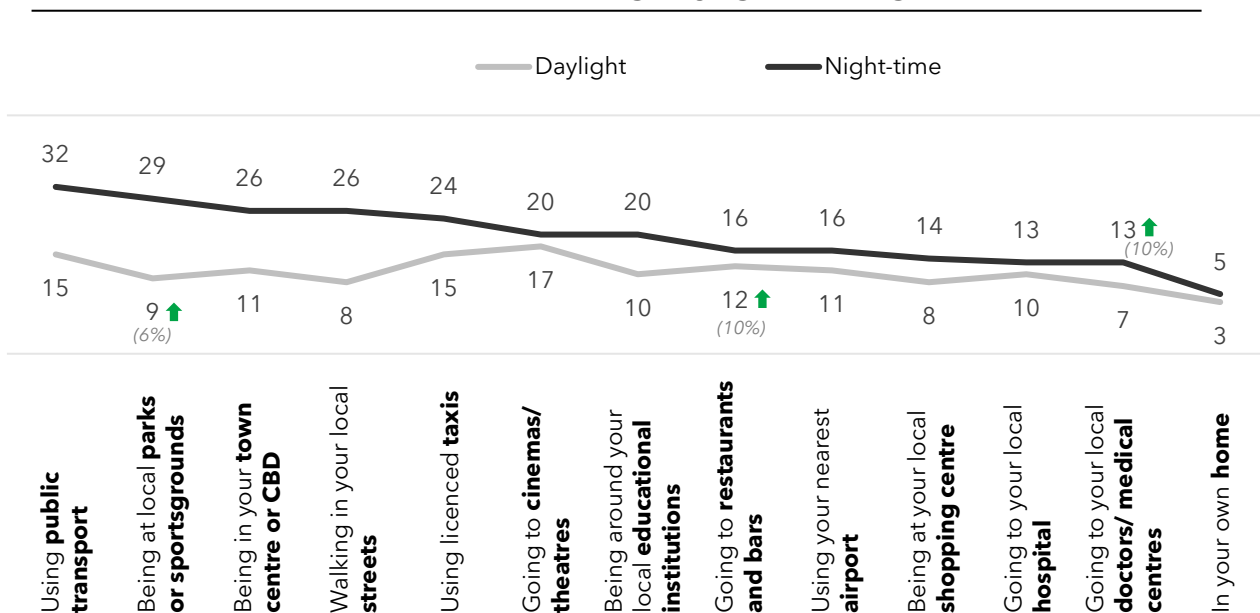
Gender, age and region play a big role in Australian safety perceptions

Safety concerns during daytime and night-time hours | Significant differences across groups

	During <u>daylight</u> hours	During <u>night-time</u> hours
Using public transport	Females (Particularly 25+)	Female (Particularly 55+) WA residents
Using licenced taxis	Females (Particularly 55+)	Female (Particularly 18-24)
Using your nearest airport		Female (Particularly 55+) Not employed
Going to your local doctors/ medical centres	Personal Income 80-100K	Female (Particularly 25+) Skilled workers
Going to your local hospital	Not currently employed	Female (Particularly 25-39)
Going to restaurants and bars	Looking for employment	Female (Particularly 55+) Not employed
Going to cinemas/ theatres	55+ (Particularly Males)	Female (Particularly 25+) 55+
In your own home	25-39 (Particularly Females) Reside in City/ CBD	Female (Particularly 25-39) 25-39
Walking in your local streets	18-24 (Particularly Females) Hospitality workers	Female (Particularly 18-24) Students
Being at local parks or sportsgrounds	Female (Particularly 25+) Not employed	Female (Particularly 55+) Personal Income <60K
Being at your local shopping centre	25-39 (Particularly Females)	Female (Particularly 25+) Personal Income <60K
Being in your town centre or CBD	Female (Particularly 25-39) Not employed	Female (Particularly 25+) Not employed and WA residents
Being around your local educational institutions		Female (Particularly 55+) Semi Skilled workers

Fears for safety remains significantly higher at night

% of Australians who feel unsafe during daylight and night-time hours



56%

of Australians feel unsafe during daylight or night-time hours

QA1A/B. How safe do you feel in these situations: A) During daylight hours? B) During night-time hours?
 Base: All respondents n=1604. Situations based on all respondents excluding those who answered Not applicable
 Note. Feel unsafe is based on bottom 3 box on a 7-point scale, where 1 indicates Very unsafe and 7 indicates Very safe

The Pandemic has sped up Australian's adoption of online shopping

Leaving more people vulnerable to cyber security issues

How much money do Australians spend online?

Australians spent a total of \$4.2 billion online in August 2021 according to Finder analysis of [ABS](#) data. This represents a 36% increase over the previous year and an incredible 114% increase over the same period in 2019. Online shopping was already on a steady incline, and the pandemic has only fast-tracked this growth.

Online retail spending in Australia (AUD\$) (2013-2021)

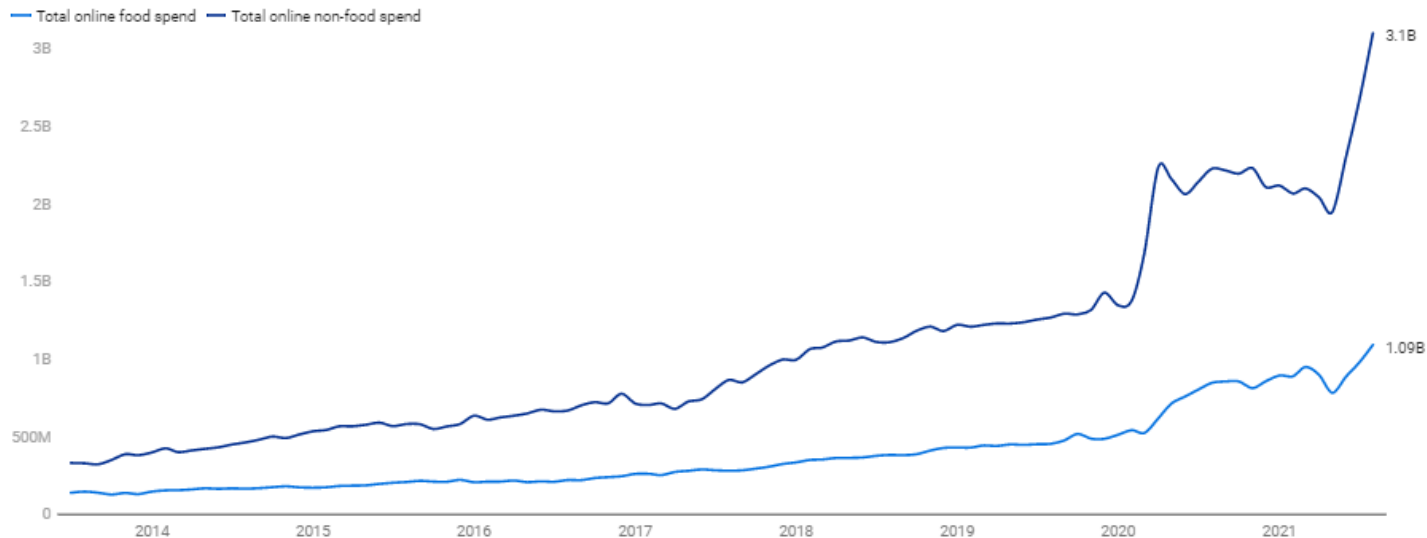


Chart: Finder • Source: ABS, 2021

Cyber Safety is now more of a concern for Australians

A third fear shopping from foreign retailers, with this sentiment being felt by significantly more Australians into 2022

Top 3 situations



▶ **32%**↑
Shopping online from foreign retailers

"I feel most unsafe using my credit card if I'm purchasing online from foreign or global retailers."
Female 55+ NSW

▶ **20%**
Using social media sites e.g. Facebook or Instagram

"I've had my social media accounts hacked so I no longer have any social media accounts."
Male 40-54 VIC

▶ **16%**
Shopping online from global retailers e.g. Amazon

"I've been scammed and had my details stolen and fraud committed on eBay."
Female 25-39 QLD

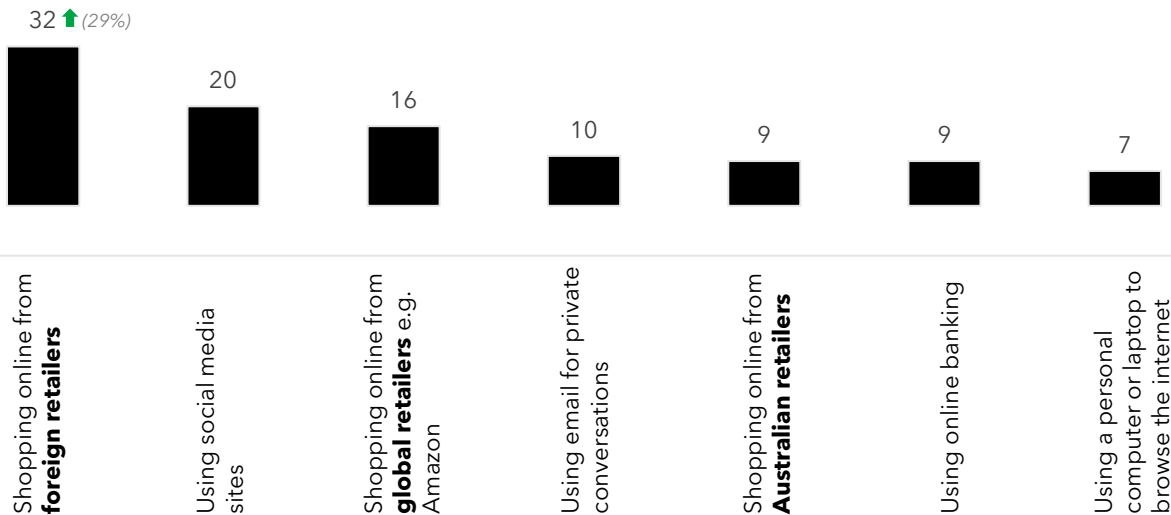
QA2. Now thinking about you personal cyber or online security, how safe do you feel using the following - on any device e.g. home laptop, mobile phone?

Base: All respondents n=1604. Situations based on all respondents excluding those who answered *Not applicable* (minimum n=1525)

Note. Feel unsafe is based on bottom 3 box on a 7-point scale, where 1 indicates *Very unsafe* and 7 indicates *Very safe*

Australian retailers are perceived to be the safest to shop from, even more so than global retailers

% of Australians who feel unsafe - Personal cyber and online security



43%

of Australians feel unsafe with their personal online or cyber security

QA2. Now thinking about you personal cyber or online security, how safe do you feel using the following - on any device e.g. home laptop, mobile phone?

Base: All respondents n=1604. Situations based on all respondents excluding those who answered Not applicable (minimum n=1525)

Note. Feel unsafe is based on bottom 3 box on a 7-point scale, where 1 indicates Very unsafe and 7 indicates Very safe

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↑ Significantly higher vs. 2021

Older Australians remain more concerned for their cyber safety

% of Australians who feel unsafe - Personal cyber and online security



43%

of Australians feel unsafe with their personal online or cyber security



QA2. Now thinking about your personal cyber or online security, how safe do you feel using the following - on any device e.g. home laptop, mobile phone?

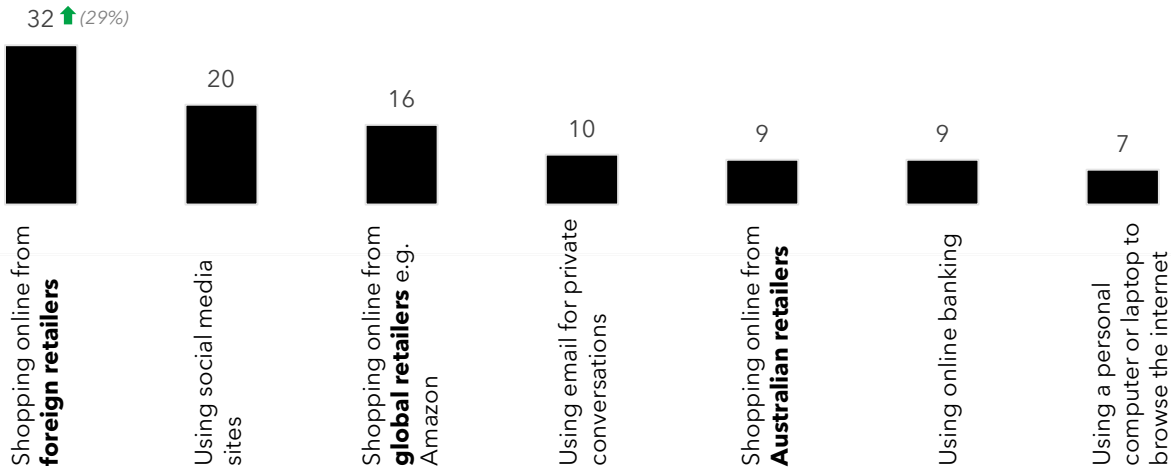
Base: All respondents n=1604. Situations based on all respondents excluding those who answered Not applicable (minimum n=1525)

Note: Feel unsafe is based on bottom 3 box on a 7-point scale, where 1 indicates Very unsafe and 7 indicates Very safe

Significant increase in feeling unsafe using foreign retailers is being driven by affluent workers in managerial positions. Young males and Victorians are now also more acutely aware of potential threats

% of Australians who feel unsafe - Personal cyber and online security

- ↑ Household Income >100K (21% vs. 27%)
- ↑ Manager/ Executive (18% vs. 31%)
- ↑ Employed full time (21% vs. 27%)
- ↑ VIC (25% vs. 32%)
- ↑ Male 18-24 (16% vs. 30%)



43%

of Australians feel unsafe with their personal online or cyber security



QA2. Now thinking about your personal cyber or online security, how safe do you feel using the following - on any device e.g. home laptop, mobile phone?

Base: All respondents n=1604. Situations based on all respondents excluding those who answered Not applicable (minimum n=1525)

Note: Feel unsafe is based on bottom 3 box on a 7-point scale, where 1 indicates Very unsafe and 7 indicates Very safe



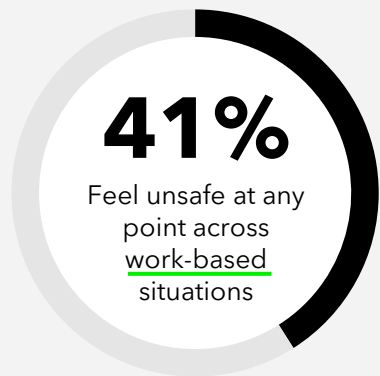
Significantly higher vs. 2021



Significant deviation compared to Total at a 95% Confidence Interval

Top 2 Cyber fears remained the same whether using personal or workplace IT. No significant increase noted for foreign retailers when using company IT, only when using personal IT

Top 3 situations



▶ **24%**

Shopping online from foreign retailers using company IT

▶ **23%**

Using social media sites e.g. Facebook or Instagram using company IT

▶ **21%**

Using work email for private conversations

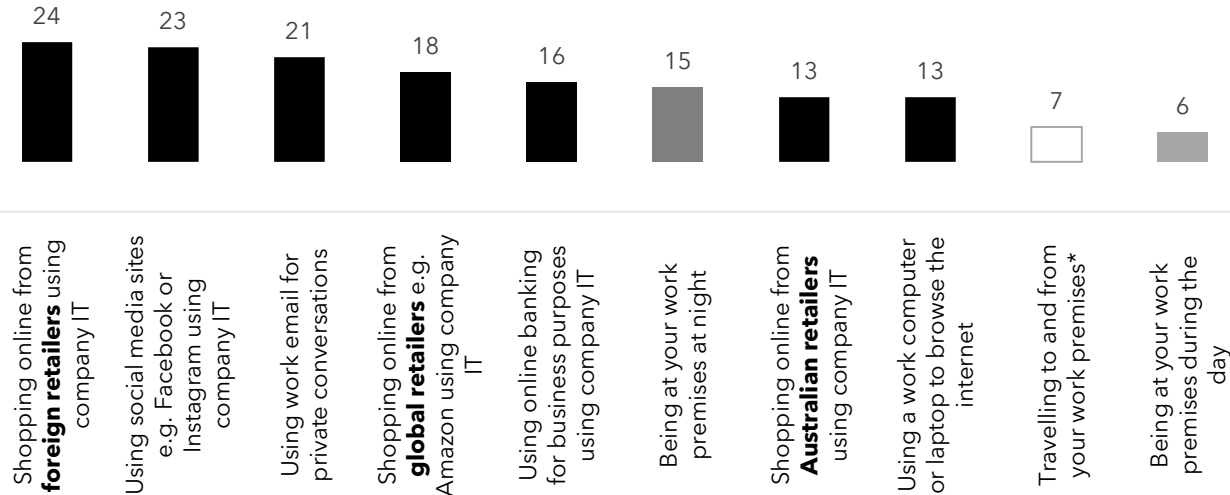
QA3. How safe do you feel at work in the following work-based situations?

Base: Respondents who are employed full-time or part-time n=918 Situations/activities based on all respondents excluding those who answered Not applicable (minimum n=754)

Note. Feel unsafe is based on bottom 3 box on a 7-point scale, where 1 indicates Very unsafe and 7 indicates Very safe

Workplace safety concerns have remained relatively stable with no significant differences noted this year

% of Australians who feel unsafe - Work-based



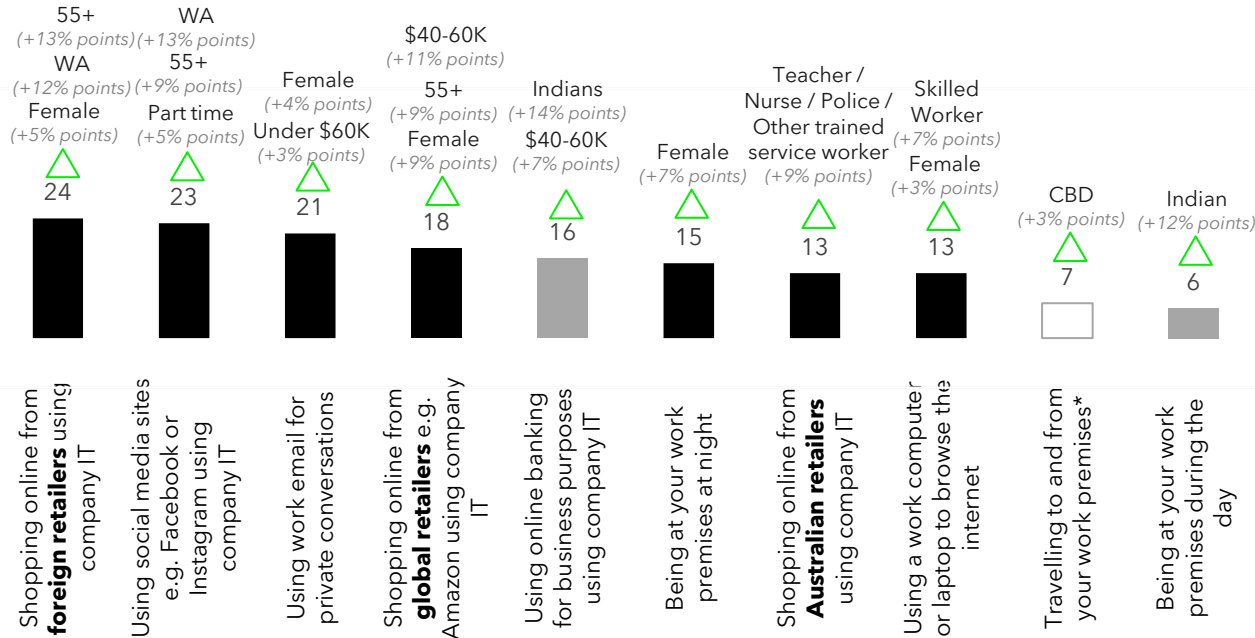
41%

of Australians feel unsafe at some point at work

QA3. How safe do you feel at work in the following work-based situations?
Base: Respondents who are employed full-time or part-time n=918. *Respondents who travel to/from work n=719
Situations/activities based on all respondents excluding those who answered Not applicable
Note: Feel unsafe is based on bottom 3 box on a 7-point scale, where 1 indicates Very unsafe and 7 indicates Very safe
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Workplace safety is more likely to be on the minds of Australian women and older Australians. Lower income and those identifying as Indian are now also more concerned

% of Australians who feel unsafe - Work-based



41%
of Australians feel unsafe at some point at work

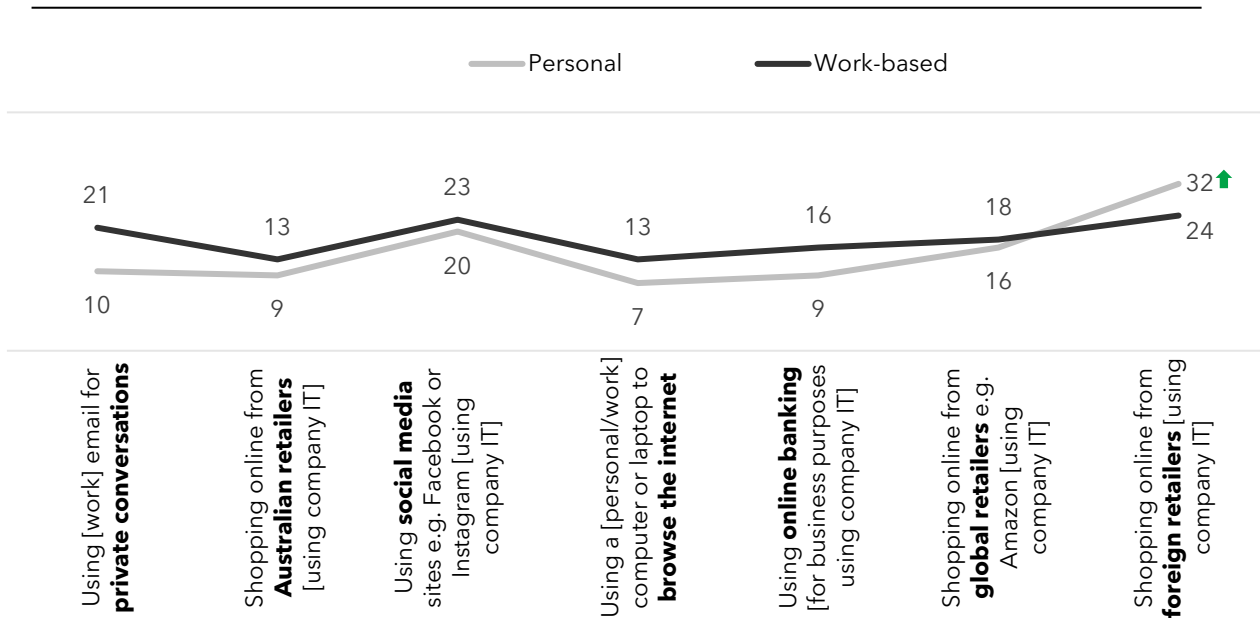


QA3. How safe do you feel at work in the following work-based situations?
 Base: Respondents who are employed full-time or part-time n=918. *Respondents who travel to/from work n=719
 Situations/activities based on all respondents excluding those who answered Not applicable
 Note: Feel unsafe is based on bottom 3 box on a 7-point scale, where 1 indicates Very unsafe and 7 indicates Very safe
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Significant deviation compared to Total at a 95% Confidence Interval

Cyber security remains a concern regardless of using personal or workplace IT, with personal IT being deemed more susceptible when using foreign retailers

% of Australians who feel unsafe with their cyber and online security



21%

Private conversations could be monitored by workplace IT

"I feel most unsafe when emailing private conversations using Company IT."
Male 40-54 QLD

QA2. Now thinking about you personal cyber or online security, how safe do you feel using the following - on any device e.g. home laptop, mobile phone? Base: All respondents n=1604.

QA3. How safe do you feel at work in the following work-based situations? Base: Respondents who are employed full-time or part-time n=918.

Situations/activities based on all respondents excluding those who answered Not applicable

Note. Feel unsafe is based on bottom 3 box on a 7-point scale, where 1 indicates Very unsafe and 7 indicates Very safe

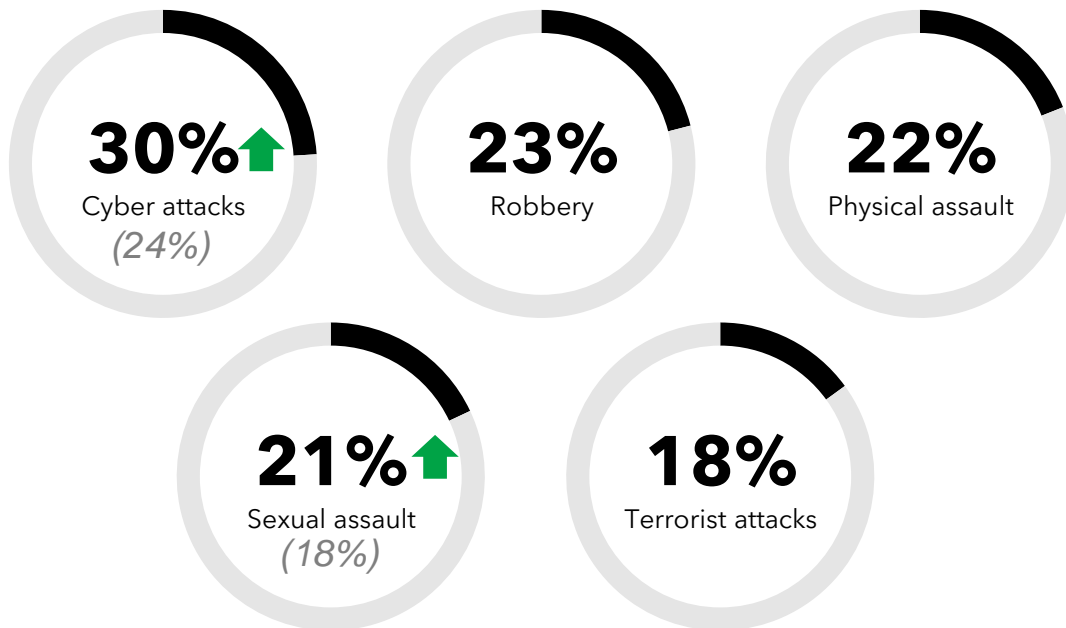


Safety in AUS

Assaults, robbery, cyber
and terrorist attacks

Significantly more Australians feel unsafe from situations beyond their control, with Cyber attacks most top of mind

Feel unsafe living in Australia from the risks of...



44% ↑ (38%)

of Australians feel unsafe living in Australia from the risks of cyber or terrorist attacks, robbery or assault

QA6. In general, thinking about being both at home and out in public, how safe do you feel living in Australia from the risks of...?

Base: Situations based on All respondents n=1604 excluding *Not applicable* (minimum n=1532)

Note: *Feel unsafe* is based on bottom 3 box on a 7-point scale, where 1 indicates *Very unsafe* and 7 indicates *Very safe*

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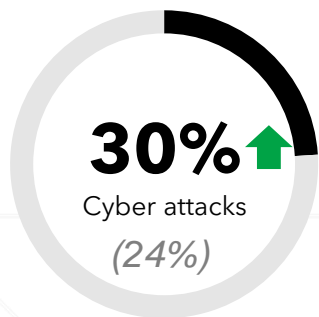
Significantly higher vs. 2021



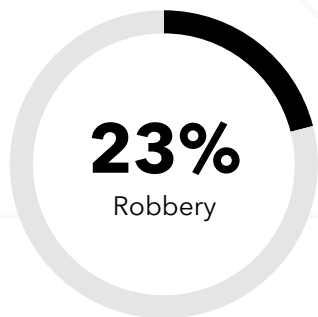
Significant deviation compared to Total at a 95% Confidence Interval

Females remain more concerned about these types of security issues

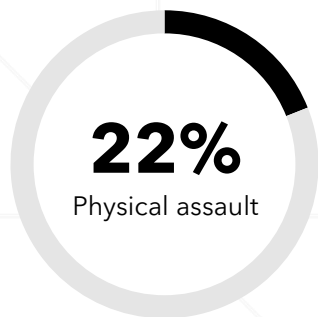
Feel unsafe living in Australia from the risks of...



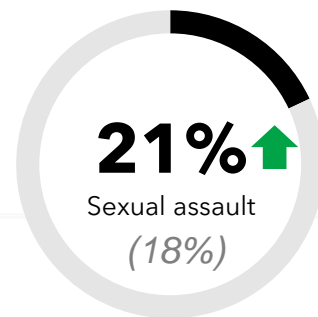
△ Female (+3% points)
Working in Hospitality industry (+11% points)



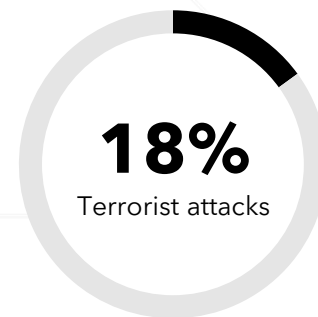
△ Female (+3% points)
Particularly 25+
18-24 (+7% points)



△ Female (+3% points)
18-24 (+8% points)
Particularly Females
Students (+13% points)



△ Female (+8% points)
Particularly 18-24 year olds
Students (+12% points)
Working in Hospitality industry (+10% points)



△ Females (+2% points)
Particularly 25+ year olds
18-24 (+6% points)

▶▶▶ **44%** ↑ (38%)

of Australians feel unsafe living in Australia from the risks of attacks, robbery or assault

Significant increased noted for females, over 40 year olds, NSW/ACT and WA residents, those living in metro centres, hospitality workers, less affluent Australians, and those living in single person households

QA6. In general, thinking about being both at home and out in public, how safe do you feel living in Australia from the risks of...?

Base: Situations based on All respondents n=1604 excluding Not applicable (minimum n=1532)

Note. Feel unsafe is based on bottom 3 box on a 7-point scale, where 1 indicates Very unsafe and 7 indicates Very safe

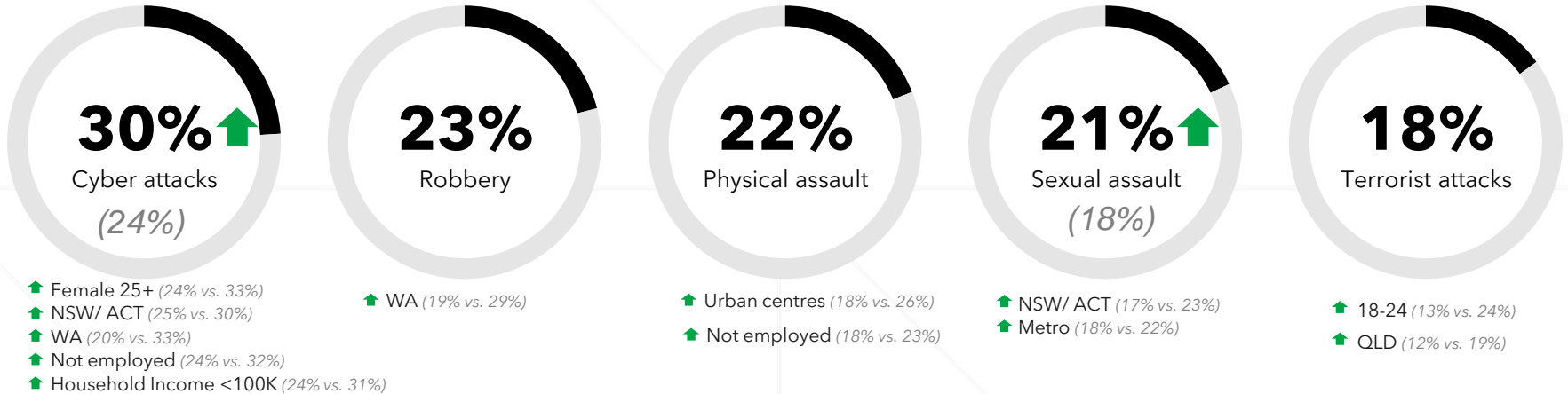
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↑ Significantly higher vs. 2021

△ Significant deviation compared to Total at a 95% Confidence Interval

Growth in cyber attacks not only higher for females, they are also now more concerned than they were a year ago

Feel unsafe living in Australia from the risks of...



NSW/ACT residents driving growth in cyber and sexual assault fears

Cyber attacks also now more of a concern for females, lower income earners, non workers and those living in WA
Sexual assault fears growing in metro areas

QA6. In general, thinking about being both at home and out in public, how safe do you feel living in Australia from the risks of...?

Base: Situations based on All respondents n=1604 excluding Not applicable (minimum n=1532)

Note: Feel unsafe is based on bottom 3 box on a 7-point scale, where 1 indicates Very unsafe and 7 indicates Very safe

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Significantly higher vs. 2021



Significant deviation compared to Total at a 95% Confidence Interval



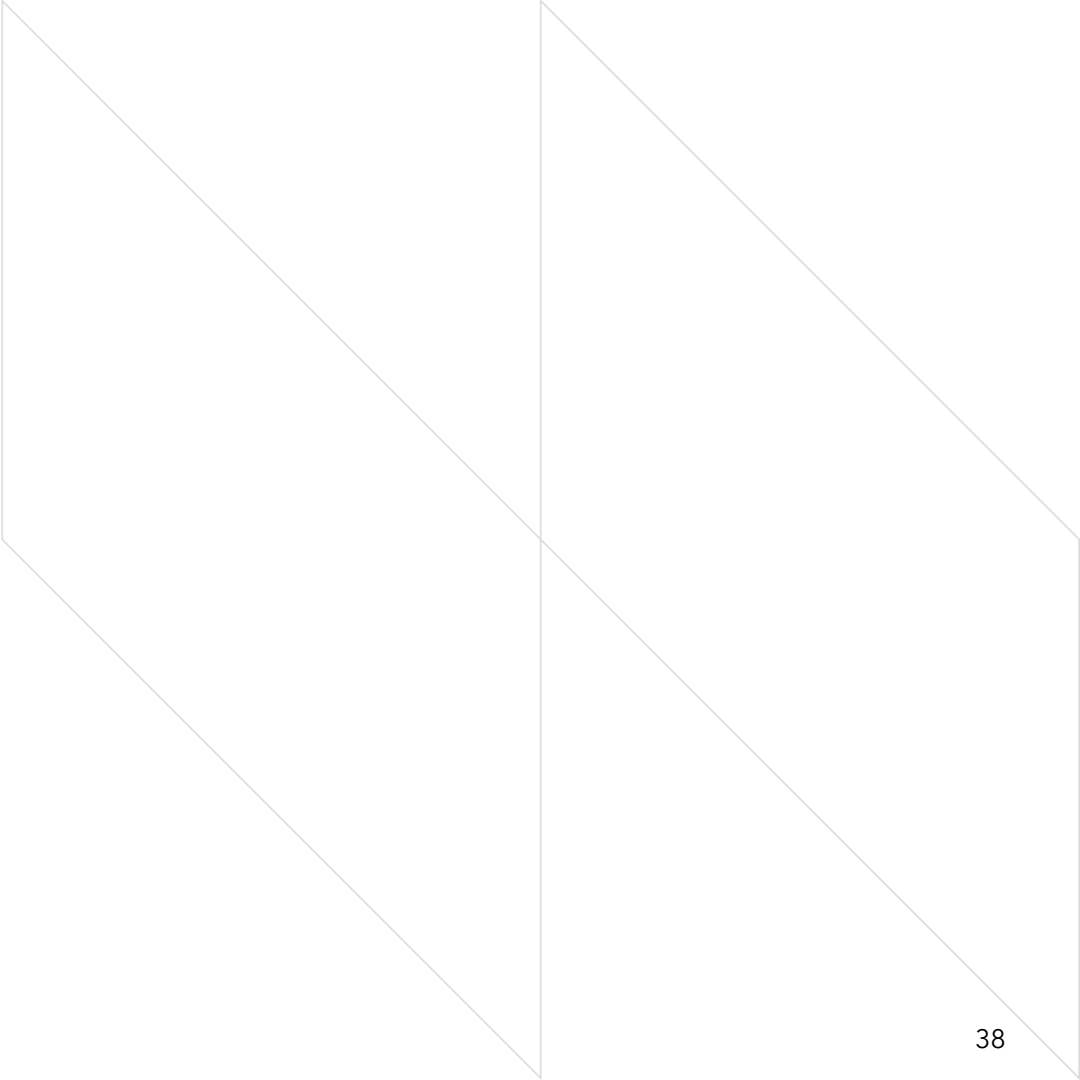
Thank you.

Angela Carter | Tibin Jose
Director of Consumer Insights | Senior Executive



Appendix I

Verbatim comments



Fear of using public transport peaks at night due to the risk of encountering dangerous elements with no perceived security/police

Safety concerns

Using public transport

"Night time on public transport - in fact, I won't any longer. I have just had too many dangerous situations where drunk, drugged or unstable people threaten you and there is no one to assist."

Male 55+ VIC

"Using public transport at night. I've had bad experiences where I've been mugged and had someone expose themselves to me on public transport."

Female 25-39 NSW

"Strange people and feel it is risky being on public transport at night."

Female 25-39 VIC

"Public transport, people are very unhygienic and violent."

Female 18-24 VIC

"I would feel unsafe to be on my own at night walking or taking public transport."

Female 55+ VIC

"Late at night on public transport - limited security Do not trust the security on these site."

Male 55+ VIC

"For public transports such as buses, you just never know who you will be in the vehicle with. There have been incidents in Australia where people have been racially abused, sexually abused and bullied on public transport."

Female 18-24 QLD

"Traveling at night on public transport can result in an immediate and physical threat of harm unlike online threats."

Female 55+ SA/NT

"Using public transport buses and trains then having to walk to car park area to drive home. Too many dangerous people around and no security."

Female 55+ WA

"I don't use the public transport very often but having to travel through some suburbs where there is trouble can be alarming."

Female 55+ SA/NT

"Catching public transport as there is no security on them - druggies, drunks and racists use public transport and it's just not a safe when they are going nuts and there is no police or security."

Female 40-54 SA/NT

"In Vic, people who enter into public transport don't often behave the best especially after 8pm. Several times on the train, we experience drunk or violent youngsters causing trouble on the train."

Male 25-39 VIC

Females, in particular, still feel vulnerable using licensed taxis and more so at night

Safety concerns

Transportation particularly using licenced taxis

"I feel most unsafe in licenced taxis during night-time hours because you are in a car with a stranger."

Female 18-24 NSW

"I feel unsafe in a licensed taxis during night-time because the driver may try to kidnap me."

Female 18-24 QLD

"I feel unsafe in a licensed taxis during night-time when I am by myself. I do not feel safe with strangers especially during night hours."

Female 40-54 QLD

"In a taxi feel most unsafe as don't know the driver and essentially quite vulnerable if alone."

Female 18-24 VIC

"Taxis also place you in a vulnerable position as you're in a lockable, enclosed space with a stranger and you're relying on them not having ill-intent."

Female 25-39 QLD

"Many Taxi drivers lack respect for women and drive unsafely."

Female 55+ VIC

"I would feel most unsafe being in a taxi at night-time because you're essentially trapped in a moving vehicle with a complete stranger that is typically a male. It's a very vulnerable position to be in and it makes me really uncomfortable."

Female 55+ VIC

"Taxi drivers are often rude."

Male 25-39 NSW

"COVID-19 situations makes it unsafe using taxis."

Male 55+ NSW

COVID-19 has increased safety fears of being in and around medical institutions

Safety concerns



Going to your local doctors/ medical centres or going to your local hospital



"Local hospitals are flooded with Covid patients. Not sure whether they still offer out patients services when I need."

Female 55+ NSW

"Hospitals - understaffed, overworked, poor care quality, poor covid rules and long wait times."

Female 25-39 VIC

"COVID-19 makes me feel unsafe everywhere."

Female 55+ NSW

"Going to the local hospital would perhaps mean contact with Covid."

Female 55+ VIC

"Everyone at medical centers is sick and I'm worried about infection."

Male 25-39 NSW

"Because of COVID-19, Omicron and other diseases."

Female 40-54 WA

"The parking is a long way away from the hospital entry and it's very scary if you are alone with a sick child."

Female 25-39 QLD

Being in large crowds near hospital or medical facility and not being able to social distance."

Male 40-54 VIC

Covid concerns are now widespread, significantly more females and over 40's now mentioning Covid-19

Safety concerns

Global pandemic/ COVID-19

"Unfortunately, this pandemic has left me scared to be around others as much as I used to."
Female 40-54 QLD

"Generally being out and about other people due to high COVID-19 numbers."
Male 55+ VIC

"Worried about getting COVID-19 and giving it to vulnerable family members."
Female 40-54 QLD

"Venturing out of the home at anytime but mainly to shop I am concerned about COVID-19."
Female 40-54 NSW

"Only because of the current COVID-19 situation."
Female 55+ VIC

"COVID-19 virus is everywhere so scared of catching it."
Male 55+ NSW

"Due to COVID-19 I don't feel safe at Restaurants and cinemas in daylight or night-time hours."
Female 55+ VIC

"At the moment I'm feeling fearful of covid the most but also of the drugs and crime in my local area people have been awful to each other even more so since the pandemic."
Female 40-54 SA/ NT

"Anywhere there's too many people around due to the Covid-19 pandemic. I have noticed that a lot of people don't like following the rules and that makes me feel uncomfortable/ unsafe."
Male 41-54 NSW

"In public places where there is or has been a lot of people who have a higher possibility of having Covid, such as taxis and airports."
Male 55+ VIC

"Crowded areas due to the risk of contracting Covid."
Female 55+ NSW

"Right now, I feel unsafe everywhere. This is due to a combination of COVID and anti vaxers. I have been harassed in the street for wearing a mask on several occasions."
Female 25-39 VIC

"Anywhere close to people who will not wear masks because of Covid and the high number of cases and deaths currently."
Female 55+ QLD

High crime levels, drug and alcohol or mental health affected people are concerns at night in the CBD

Safety concerns

Being in your town centre or CBD

"Too many dodgy characters hanging around in the CBD during night hours."

Male 18-24 QLD

"Using public transport on weekends coming from the CBD areas."

Male 40-54 NSW

"CBD has become a place where the crimes are increasing, especially at night hours."

Female 55+ WA

"I avoid CBD and local parks/sportsgrounds at night because I feel very unsafe especially at night."

Female 55+ QLD

"Being in the CBD at night because there are a lot of drunk people."

Female 25-39 WA

"I don't like going out at night, especially the CBD as it's not a safe place to be on your own."

Female 55+ WA

"During the night, Melbourne CBD can be violent and have criminals."

Male 18-24 VIC

"I feel most unsafe in the CBD at night due to poor lighting in some parts of the city, lots of pubs around (with people consuming too much alcohol) People seem to be generally much angrier these days and don't need much/any provocation!"

Female 40-54 SA/NT

"Using public transport into and being in the CBD feels very unsafe."

Female 55+ WA

"In general night-time hours in my CBD and locally walking is generally a scary exercise due to youths roaming the streets looking for trouble."

Male 40-54 TAS

"There is a lot of violent behaviour in the CBD during night hours."

Female 55+ SA/ NT

"Walking in the CBD at night. Not enough police."

Male 55+ WA

"I live in a city which has the highest crime rate in the country with numerous break ins and cars stolen running around the streets at high speed throughout the day and night." *Male 55+ QLD*

Our parks and sportsgrounds tend to be avoided, particularly at night, due to being perceived a hotbed of criminal intent

Safety concerns

Being at local parks / sportsgrounds

"Being at local parks or sportsgrounds. Local parks are not well lit at night and only weird people would hang out in these locations for the wrong reasons and most likely up to no good."

Female 40-54 NSW

"I would not go to a park at night as there would not be people around and I feel it is an unnecessary risk."

Female 55+ QLD

"I would never go to local sportsgrounds or parks at night, so those places would therefore be where I feel most unsafe. In the dark, there is always a possibility that somebody is hiding/ waiting for a victim or similar."

Female 55+ VIC

"I feel I would be unsafe at night in a local park or sportsground because people have been sexually assaulted in those places at night."

Female 55+ NSW

"Being at the local parks because of the criminal element."

Female 40-54 NSW

"I would never go to my local parks or sportsgrounds at night because it is too dark and packed with homeless people."

Female 40-54 NSW

"I would never go to my local parks or sportsgrounds at night because it is dark and unsavoury characters hanging out there"

Female 40-54 QLD

"Being at local parks because I have children so I'm worried they might get taken while I'm not looking."

Female 18-24 QLD

"I would never go to my local parks or sportsgrounds at night because I can be in immediate physical danger."

Male 25-39 VIC

Night time continues to cue danger for many activities, but Covid has added an extra element of risk for bars, restaurants and cinemas/theatres

Safety concerns



Going to restaurants / bars

"Bars are dangerous. Drunk and aggressive people being out at night. Alone as a female I generally feel unsafe."

Female 40-54 NSW

"Going to restaurants and bars night-time Covid risk."

Male 55+ WA

Going to cinemas / theatres

"Going to cinemas right now with large crowds and the Covid virus makes me hesitant."

Female 50-54 QLD

"All those people in that small confined space without masks on because they are eating and drinking, with the air conditioner on circulating the Covid around - would never put myself in that situation."

Female 55+ NSW

Walking in your local streets

"Walking in your local street at night because you don't know who is lurking around to cause trouble."

Female 55+ WA

"Walking in your local street at night because lots of people who are intoxicated around and potentially can make poor decisions."

Female 18-24 NSW

"During night-time hours- walking in my local streets. It has never been safe for me walking at night-time and it probably never will be."

Female 18-24 VIC

"Walking in your local street because there is a lack of surveillance."

Female 25-39 QLD

"Walking in your local street because you have lower visibility of who is around."

Female 40-55 SA/ NT

"Being out of the house in general at night-time, whether alone or with someone. Walking my local streets would make me feel the most unsafe."

Female 40-55 NSW

"Walking in your local street at night because criminal activities make me rather frightened to be out at night."

Male 55+ NSW

"When I am walking home at night and it is after dark as this is the time when there are drunk people around."

Male 25-39 VIC



Privacy and having personal information stolen and/or misused remains the key concern of Australians using the internet

Safety concerns



Cyber



"Concerns over use and manipulation of personal and private data."

Male 55+ WA

"Losing control of information, uncertainty on losing data."

Male 55+ VIC

"I feel unsafe about the security of my information in their database."

Female 25-39 WA

"Other people can access security data. Foreign companies cannot be trusted."

Male 25-39 NSW

"Banking details are very private, and hackers know how to access details is a concern for me."

Female 55+ VIC

"In the situation of providing payments to foreign companies as I am not sure how secure the transfer is."

Male 25-39 NSW

"There are no guarantees they are who they say they are, some countries have little internet regulation."

Male 25-39 QLD

"Firstly, I know that some forms of communication such as email are not secure and there is always a threat from unscrupulous actors. Secondly, the terms and conditions when dealing with legitimate companies are way too long and confusing, I know I should read all the fine print but who really has the time?"

Male 40-54 QLD

"Online safety is the biggest concern and exposes me and most people to identity theft and hacking risk."

Male 40-54 VIC

"If I am online, I feel that I am open to people who can hack my accounts."

Male 55+ QLD

"Don't trust a lot of foreign websites, especially when they don't accept PayPal."

Female 55+ NSW

"Using online banking because it is quite easy to be hacked by professional thieves."

Female 18-24 NSW

"I am concerned about how my personal information is held, used by and potentially provided to other organisations."

Male 55+ SA/ NT

"I am scared my account details could get hacked, my identity or passwords."

Female 25-39 NSW

"There is not enough protection on some sites and these things get hacked all the time."

Male 25-39 QLD

There are many examples of actual issues using social media and shopping online which foster a healthy distrust of these activities

Safety concerns



Cyber particularly social media

"I feel unsafe browsing or using my social media because I feel like my data/ personal information can just be taken without my consent."
Male 55+ SA

"I feel social media can be a little unsafe as you never know who is viewing your profile."
Female 25-39 WA

"Many scams originate from social media use like break and enters if you talk about being away on holiday for instance."
Male 55+ TAS

"I would feel unsafe using social media due to the amount of data collected."
Male 25-39 VIC

"I've had my social media accounts hacked so I no longer have any social media accounts."
Male 40-54 VIC

"I have had issues with Amazon and I don't trust Facebook at all and I have had friends who have had their accounts hacked."
Female 40-54 QLD

"I feel unsafe browsing or using my social media because we hear horrible scam stories about the elderly using online and social media."
Male 55+ NSW

"Facebook and Instagram allow bad behaviour to go unchecked, through stories and trolling."
Male 55+ NSW



Cyber particularly online shopping

"I don't feel very safe shopping at overseas retailers as their laws and regulations may be well below the local laws for things such as data privacy, consumer protection, etc. Especially when using my office computers to access them as they may be more inclined to get data from our business."
Male 25-39 VIC

"Shopping from overseas retailers because I bought something online from overseas and my credit card details fell into the wrong hands and a thief illegally used my card."
Female 40-54 SA/ NT

"I feel most unsafe using my credit card if I'm purchasing online from foreign or global retailers."
Female 55+ NSW

"I don't know whether they are legitimate sites. I prefer to use those I know are secure and legit."
Female 40-54 VIC

"Online foreign retailers because once they have your credit card numbers some dishonest employee will start using it."
Female 55+ VIC

"I've been scammed and had my details stolen and fraud committed on eBay."
Female 25-39 QLD

"I have had my banking card compromised three times in the last year & its has always been when I have purchased items online from overseas companies."
Female 55+ NSW

"Worried about credit card details being compromised."
Male 25-39 QLD

"Shopping online from foreign retailers I'd be worried they send me something and if didn't want it I wouldn't get a refund."
Female 25-39 WA

Both a risk to personal and company information security are reasons for not using work IT for personal reasons

Safety concerns

Cyber particularly work-related

"Wouldn't use/not appropriate to use company/work computer for personal matters."

Female 40-54 TAS

"Wouldn't use Company IT to browse internet because it is not safe, and data could be stolen."

Female 25-39 NSW

"I feel unsafe to use personal email on company IT as management can see it."

Male 40-54 QLD

"I wouldn't use Company IT to access internet banking because it could be monitored."

Female 25-39 NSW/ACT

"Wouldn't use Company IT for non work-related things as my employer can track it."

Female 40-54 VIC

"I don't think using a work email for personal communication is secure."

Male 18-24 NSW

"I wouldn't use Company IT to save personal information as I am not sure how safe it is."

Female 55+ NSW

"Wouldn't use Company IT for personal internet browsing as they can track it."

Male 25-39 VIC

"With work emails I'd be worried someone could read my messages and wouldn't do this on a work email."

Female 25-39 WA

"I feel most unsafe when emailing private conversations using Company IT."

Male 40-54 QLD

"Wouldn't use company IT for internet banking as it could be monitored."

Male 55+ VIC



Appendix II

Background, objectives and Omnibus methodology



The business context

ASIAL - A peak body for security professionals

- Covering small, medium and large businesses across all sectors of the security industry, ASIAL is the peak body for the Australian security industry.
- As the key industry voice, ASIAL lobbies all levels of Government, trying to drive consistently high standards and codes of conduct in the industry.
- For members it provides advice and assistance to increase the professionalism of the sector.

A 2021 benchmark of the security sentiments of everyday Australians was undertaken

- ASIAL conducted the inaugural ASCI benchmark research at the beginning of 2021.
- This covered **offline** situations, across both day and night time, and **online** situations Australians might find themselves in as well as **work-based** safety concerns.
- **Overall safety** in the day to day lives of Australians was the key metric collected and reported as the ASCI.
- This study also looked to understand the 'why' behind situations in which Australians feel most unsafe.



Next steps

- ASIAL used this research in a number of ways over the year but now there is a need to update the findings in light of another eventful year - Covid, political changes in Australia and broader regional instability - all potentially impacting safety concerns.
- This will also give ASIAL an understanding the impact of macro events and policy changes on Australians and be a source of insight to lobby for further changes to the industry and policies.



Research objectives and topics

Key research objectives

1. Take another pulse of the Australian population with regards to personal and workplace safety/security in order to provide longitudinal as well as point in time insights
2. Generate insights that can be used by members to inform conversations with clients
3. Generate insights that can be used with all levels of Government to try and lobby for more uniform standards across Australia with greater collaboration across states
4. Improve collective knowledge and provide thought leadership that can be used for PR purposes for ASIAL

Topics covered

- 13 **offline** situations Australians might find themselves in, from being in their own home to being out and about. These situations have been duplicated to understand safety fears during daylight and night-time hours
- 7 **online** personal cyber and online security situations Australians might find themselves in, from online banking to sending emails
- For workers, **work-based** safety concerns across 10 offline and online situations
- **Overall safety** in day to day lives and general perception of safety from the risks of cyber or terrorist attacks as part of living in Australia (Perceived Safety Index)
- Understand the 'why' behind situations in which Australians feel most unsafe



NielsenIQ Omnibus Research Design

ASIAL Wave #2 2022



Methodology - Online survey conducted as part of the NielsenIQ omnibus



Sample size - N=1,600 Australians, nationally representative and weighted to reflect the Australian adult population

Sample size for ASIAL boosted (standard omnibus n=800 per wave)



Target sample - Adults aged 18 years and over who have access to the internet



Questions - 6 closed questions and one open-ended question



Timeline - Fieldwork: Friday 28th January 2022 to Monday 7th February 2022

WA Covid-19 case numbers

A new peak in covid-19 numbers on the horizon having been effectively Covid-19 free since March 2020



Understanding safety and security perceptions of Australians in their day to day lives

ASIAL ASCI questions

- QA1A/B. How safe do you feel in these situations: A) During daylight hours? B) During night-time hours?
As you read through each situation, please indicate how safe you feel for each using the scale from 1 to 7, where 1 means Very unsafe and 7 means Very safe. Base: All respondents
- QA2. Now thinking about you personal cyber or online security, how safe do you feel using the following - on any device e.g. home laptop, mobile phone?
As you read through each activity, please indicate how safe you feel for each using the scale from 1 to 7, where 1 means Very unsafe and 7 means Very safe. Base: All respondents
- QA3. How safe do you feel at work in the following work-based situations?
As you read through each work-based situation, please indicate how safe you feel for each using the scale from 1 to 7, where 1 means Very unsafe and 7 means Very safe. Base: Respondents who are employed full-time or part-time
- QA4. Overall, thinking about your day to day life, how safe do you feel?
Please indicate how safe you feel using the scale from 1 to 7, where 1 means Very unsafe and 7 means Very safe. Base: All respondents
- QA5. You indicated you don't feel very safe at the following time(s) in your day to day life. In what situations do you feel most unsafe and why?
Please be as detailed as possible. Base: Respondents answered
- QA6. In general, thinking about being both at home and out in public, how safe do you feel living in Australia from the risks of...?
As you read through each risk please indicate how safe you feel for each using the scale from 1 to 7, where 1 means Very unsafe and 7 means Very safe. Base: All respondents

Understanding safety and security perceptions of Australians in their day to day lives

ASIAL omnibus situations/activities

During daylight and night-time hours QA1A/B

In your own home

Walking in your local streets

Being at local parks or sportsgrounds

Being at your local shopping centre

Being in your town centre or CBD (Central Business District)

Using public transport e.g. trains, buses or ferries

Using licenced taxis

Going to restaurants and bars

Going to cinemas/ theatres

Being around your local educational institutions e.g. schools/ TAFE/ universities

Going to your local doctors/ medical centres

Going to your local hospital

Using your nearest airport

Personal cyber and only security QA2

Using online banking

Shopping online from Australian retailers

Shopping online from foreign retailers

Shopping online from global retailers e.g. Amazon

Using social media sites e.g. Facebook or Instagram

Using email for private conversations

Using a personal computer or laptop to browse the internet

Work-based QA3

Using online banking for business purposes using company IT

Shopping online from Australian retailers using company IT

Shopping online from foreign retailers using company IT

Shopping online from global retailers e.g. Amazon using company IT

Using social media sites e.g. Facebook or Instagram using company IT

Using work email for private conversations

Using a work computer or laptop to browse the internet

Being at your work premises during the day

Being at your work premises at night

Travelling to and from your work premises

Sample demographics

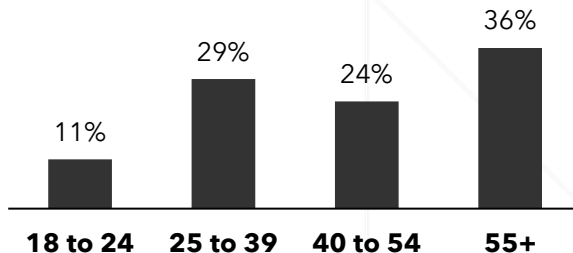
The NielsenIQ omnibus surveys a nationally representative sample across Australia of people aged 18+ and who have access to the internet.

Quotas

Gender



Age



Location



NSW/ACT	34%
VIC	26%
QLD	19%
SA/NT	8%
WA	10%
TAS	2%

The NielsenIQ omnibus includes the below demographic questions

	No.	Question
Gender	DQ1	Please indicate your gender
Age	DQ2	Please type in your age
State/ City of residence	DQ3A	Which area of Australia do you currently live?
Place of residence *	DQ3B	Which best describes where you currently live?
Grocery/ Household shopper	DQ4	Which of these statements best applies to you?
Access to the internet	DQ5	How often do you usually access the internet?
Working status	DQ6	What of the following best describes your current employment status?
Place of work *	DQ6B	Where do you work?
Public work/ private *	DQ6B	Does your job involve dealing with the general public?
Migrated to Australia *	DQ3C	Have you migrated to Australia from another country?
Length of time lived in Australia *	DQ3D	How long have you been living in Australia for?
Ethnicity	DQ7	With which ethnic background(s) do you mainly identify?
Personal occupation	DQ8	Which one best describes your [current or previous] occupation?
Industry of occupation *	DQ8B	Which one best describes the industry of your [current or previous] occupation?
Personal and Household Income	DQ13 & DQ14	Please indicate your personal gross annual income from all sources before tax? And please indicate the total household gross annual income from all income earners in your household and all other sources before tax?
Number in household	DQ11	How many people live in your household, including yourself, any children and any boarders?
Household description/ children	DQ15/16/16B	Which of these statements best describes your household? And which of the following age group(s) does/ do your child/ children fall into? And what is the age of your youngest child living with you?

* Additional questions that were added and asked for ASIAL in order to get a more detailed understanding of the factors that that impact perceived safety.