



ASCI

ASIAL Australian Security Confidence Index 2023 Report

Angela Carter
Director of Consumer Insights

March 2023



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Executive summary

Key results from the annual ASIAL ASCI research

Key results

Overall safety: Overall safety perceptions have remained stable with only 5% of Australians feeling unsafe overall. However, those who work out of other Australian's homes and those who work in the IT industry are twice as likely to feel unsafe.

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

Covid-19, while having a major impact on Australian's lives over the past few years, seems to be losing its impact on safety perceptions.

Covid-19 was as high as #4 on the list of reasons Australian's felt unsafe going about their daily lives (2021), it is now mentioned by only 1%.

Activities done at nighttime remains the most top of mind reason for feeling unsafe in Australia.

During daylight OR night-time hours:

With the easing of Covid-19 concerns, now 28% of Australians feel unsafe at any point doing day to day activities during daylight hours. This is significantly lower than last year (38%). Safety concern levels remain elevated (50%) when doing these same activities after dark.

The activities we now feel significantly safer doing during the day are ones where we are likely to be in enclosed areas with crowds – going to bars and restaurants or going to the airport, both down 6% and being in cinemas down 11% – another link with a reduced Covid threat.

Australians also feel safer in education facilities (down 5%), using taxis (down 4%), going to shopping centres and using public transport (both down 3%) and being in the city/CBD (down 2%).

We are also feeling safer accessing medical facilities like hospitals (down 4%) and going to the doctor or a medical centre (down 3%).

Australians feel most unsafe during the day using public transport (12%), using taxis (11%) and being in the city/CBD (9%), however, reasoning is now related to feeling unsafe from crime/violence.

When it comes to activities during the night, Australians feel most unsafe using public transport (30%), being at local parks/sportsgrounds (30%) and walking their local streets (27%).

Again, we have seen a significant decrease in feeling unsafe, due to becoming desensitized to Covid-19. Being in cinemas (down 9%), at the airport (down 6%) and going to restaurants/bars (down 4%).

Additionally, we are feeling safer about going to the doctor/medical centres (down 5%) and to the hospital (down 2%).

Executive summary

Key results from the annual ASIAL ASCI research

Key results regarding living in Australia

There has been a slight increase in the number of Australians that feel unsafe living in Australia from the risks of cyber or terrorist attacks, robbery or assaults (46% up from 44% in 2022).

Australians remain most concerned about cyber attacks (31%), followed by robbery (24%) and physical assault (21%). As many as 19% are concerned about sexual assault and 16% fear terrorist attacks on Australian soil.

Feeling unsafe about the possibility of these occurring has increased by 1% for cyber attacks and robbery, but decreased from physical assaults, sexual assaults and terrorist attacks.

Females remain more likely to feel at risk of these occurrences.

Key results regarding cyber and online security

While Covid-19 has changed the way Australian's live, work and shop, its impact on our safety perceptions is waning in all areas.

Even though scams and cyber attacks, digital data breaches and the like are common place, Australian's are quite complacent about the dangers.

Personal cyber and online security

(40%): Feeling unsafe while using personal IT is relatively stable and is dominated by concerns about using foreign retailers (31%). There is a considerable drop to the next biggest fear, using social media (17%) and shopping from global retailers (13%).

Australian retailers are only seen as unsafe for as few as 7% of Australians.

Work-based situations: Fear of cyber security while in work based situations has decreased significantly to 36% from 41% in 2022. This has been driven by a decline in concern about using social media (18% cf. 23% in 2022) and also being at work (3% cf. 6% in 2022) - a decline most likely Covid-19 related.

Work based concerns are still led by using foreign retailers to shop at (21%) followed by using social media and work email for private conversations (both 18%).

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 5% of Australians
feel unsafe...**

Overall safety index is stable into 2023

While most Australians generally feel safe, they are still able to voice key concerns about their overall safety living in Australia

Overall safety



"Providing personal details on-line has a reasonable chance of identity theft."
Male, 40-54, VIC

"In public—antisocial behaviour, the possibility of random, unprovoked violence, homeless people, disheveled youth."
Male, 18-24, Melbourne

"The invasion of youth gangs not only in public areas but home invasions are a real danger."
Male, 55+, NSW

"The crime rate continues to grow."
Female, 25-39, Sydney

"Around shopping centres and parks just everywhere in Tasmania at the moment."
Female, 40-54, TAS

"In certain situations we have groups of people milling around. They maybe just all friends out for a good time, but definitely put me on edge. Alternatively, you also have people who come out of licensed premises who are either drunk, high on drugs or both just wanting to start something."
Male, 40-54, Brisbane

"There is a lot of crime during the night close to where I live. I find cyberattacks unsafe and had family affected by it recently."
Female, 25-39, Sydney

"The crime rate in my town is extremely high right now. I just don't feel safe in exposed areas or anywhere by myself really."
Female, 25-39, Melbourne

"The local parks at night have people that hang around them and I don't feel safe. And every shop online could be a scammer."
Female, 25-39, Sydney

"I feel unsafe going into the CBD and avoid it because of the undesirable people there."
Female, 55+, Brisbane

"Night time, car parks with teenagers hanging around. Online shopping scams."
Male, 55+, QLD



QA4. Overall, thinking about your day to day life, how safe do you feel? Base: All respondents n=1205

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 5% feel unsafe, this is double among those who are entering others' homes to conduct their work and among those working in the IT industry

Overall safety



△ 11% work from other people's houses

△ 10% IT workers

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



1. Night-time/ Dark (#1)
2. Public transport/ buses/ trains/ ferries (#8)
3. Being alone/out alone (#5)
4. In public areas/ parks or sportsgrounds/ bars or restaurants/ cinemas (#2) ↓
5. Too much crime/high crime rate (#13) ↑
6. Feel uncomfortable/vulnerable (#27) ↑
7. In the Central city/ CBD/ Main Street/ shopping malls (#10)
8. Walking my local streets (#3) ↓
9. Online / Social media (#9)
10. Antisocial/ suspicious people around/ groups of youths (#6) ↓

(Top 10 ranking in 2022)

↓ Significantly lower vs. 2022

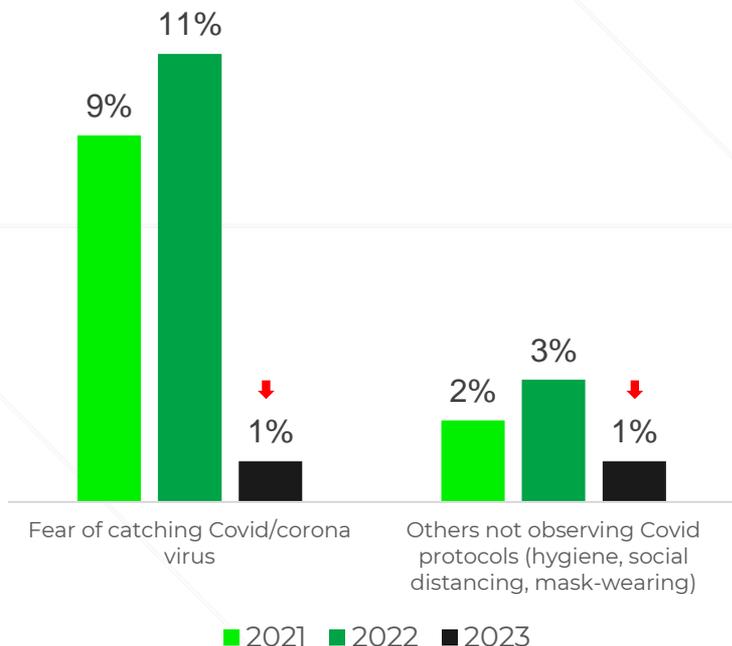
↑ Significantly higher vs. 2022

Covid fears have dropped out of the Australian consciousness with only a handful of the population retaining fears in this regard

Safety concerns



Global pandemic/ COVID-19



"Risk of getting Covid-19 particularly in places like the lifts."

Male 40-54 NSW

"I try to avoid crowded places as far as possible due to COVID-19 risks."

Male 55+ TAS

"Being in large groups is always a concern due to Covid and other possible infections."

Female 40-54 WA

"A big crowd don't want to get Covid again as it makes you lose a week."

Male 25-30 NSW

"Where there are other people - because of Covid-19. People don't wear masks anymore and don't take precautions. People think it's gone, well it's not!."

Female 55+ NSW

"Worried about getting COVID-19 and giving it to vulnerable family members if I go out local shopping centers, town centers airports etc."

Female 40-54 WA

"being in public transport due to covid worries and close contact."

Male 55+ NSW



Personal Safety

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

Australians are most likely to feel unsafe at night, with safety concerns reducing across all areas in 2023



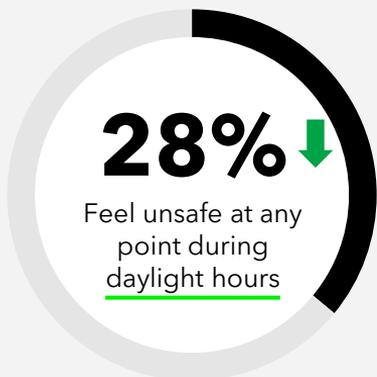
Note. Feel unsafe is based on bottom 3 box on a 7-point scale, where 1 indicates Very unsafe and 7 indicates Very safe

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In 2023 significantly less Australians feel unsafe going about their daily lives in daylight hours

A reduction in fears around Covid-19 has reduced the level of fear down to base level crime/violence concerns only

Top 3 situations



▶ **12%** ↓
Using public transport
e.g. trains, buses or ferries

"Public transport - there is an increase in crime and burglary."
Female 25-30 Melbourne

▶ **11%** ↓
Using licenced taxis

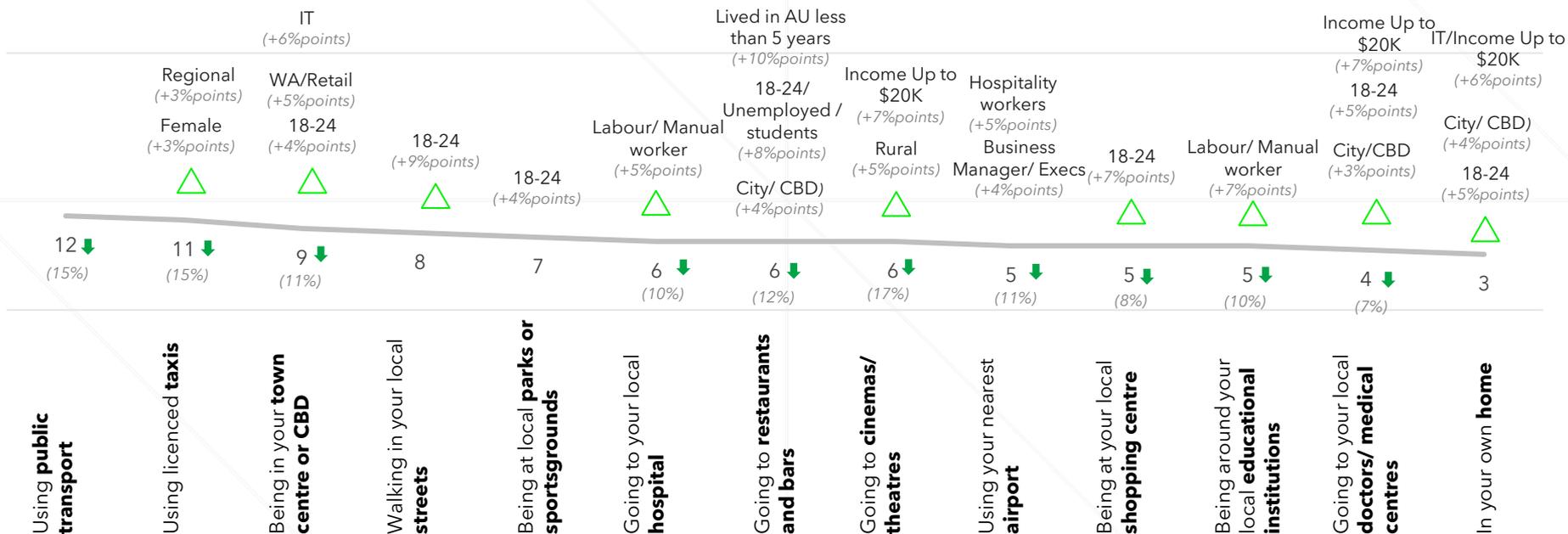
"In taxis Because I had a bad experience in a taxi a few years ago."
Female 25-30 NSW

▶ **9%** ↓
Being in your town centre or CBD

"CBD due to unstable people."
Female 18-24, Brisbane

Just over a quarter feel unsafe going about their daily lives

Safety perceptions reduced in any crowded areas or where Covid-19 might be more prevalent. We do still see safety perceptions heightened by different demographic groups where crime and violence might be more likely to occur

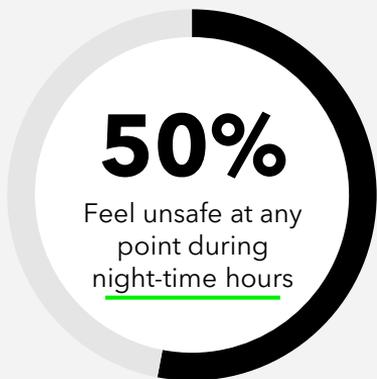


QA1A. How safe do you feel in these situations: A) During daylight hours?
 Base: All respondents n=1205. Situations based on all respondents excluding those who answered Not applicable (minimum n=1011)
 Note. Feel unsafe is based on bottom 3 box on a 7-point scale, where 1 indicates Very unsafe and 7 indicates Very safe

Fear levels rise to half the population when considering these activities at night

Public transport remains a key issue and has been joined by being a local parks and sportsgrounds in 2023. Walking local streets at night is deemed unsafe for over a quarter of Australians

Top 3 situations



▶ **30%**
Using public transport
e.g. trains, buses or ferries

"Town centre night gangs youths at public transport hubs or Taxi ranks."
Male 50+ QLD

▶ **30%**
Being at local parks
or sportsgrounds

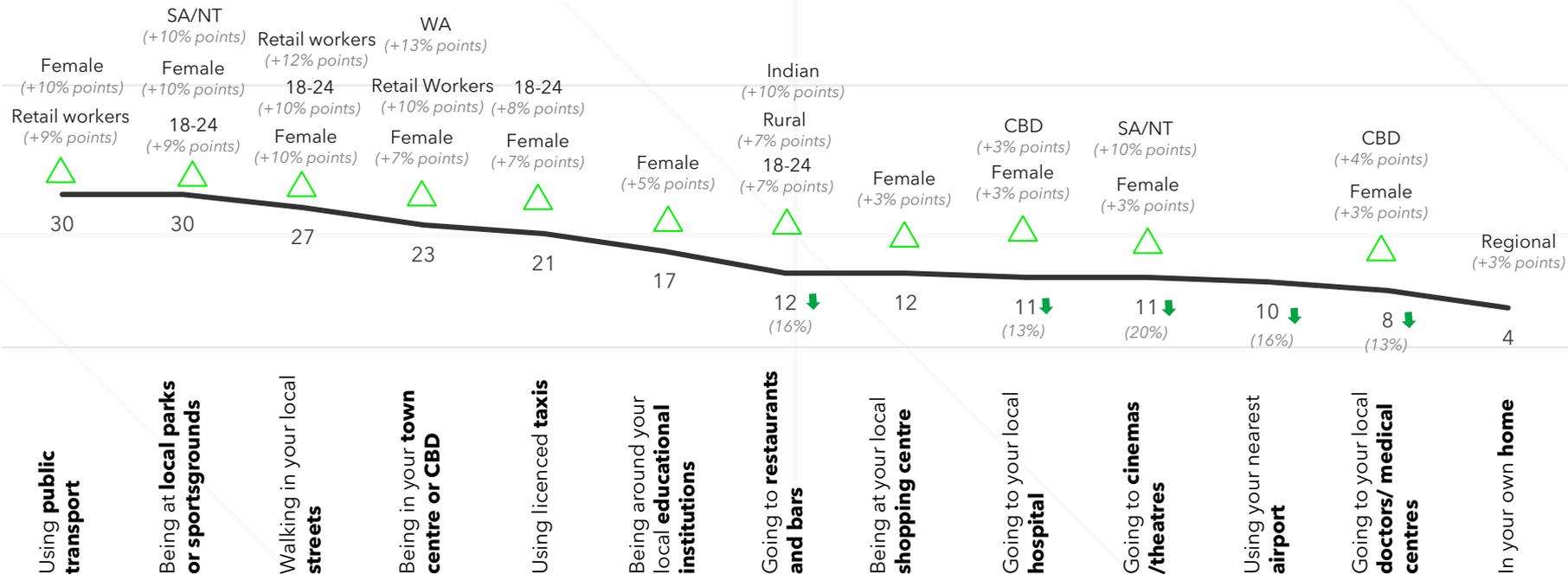
"Being in local parks at nighttime, as usually there is very poor lighting and you don't know who is around."
Female 25-30 Brisbane

▶ **27%**
Walking in your
local streets

"Walking streets/parks at night, to much scum out there."
Male 50+ Perth

Reduction in fear of Covid-19 has also impacted fear levels for bars/ restaurants, cinemas, airports and hospitals/doctors

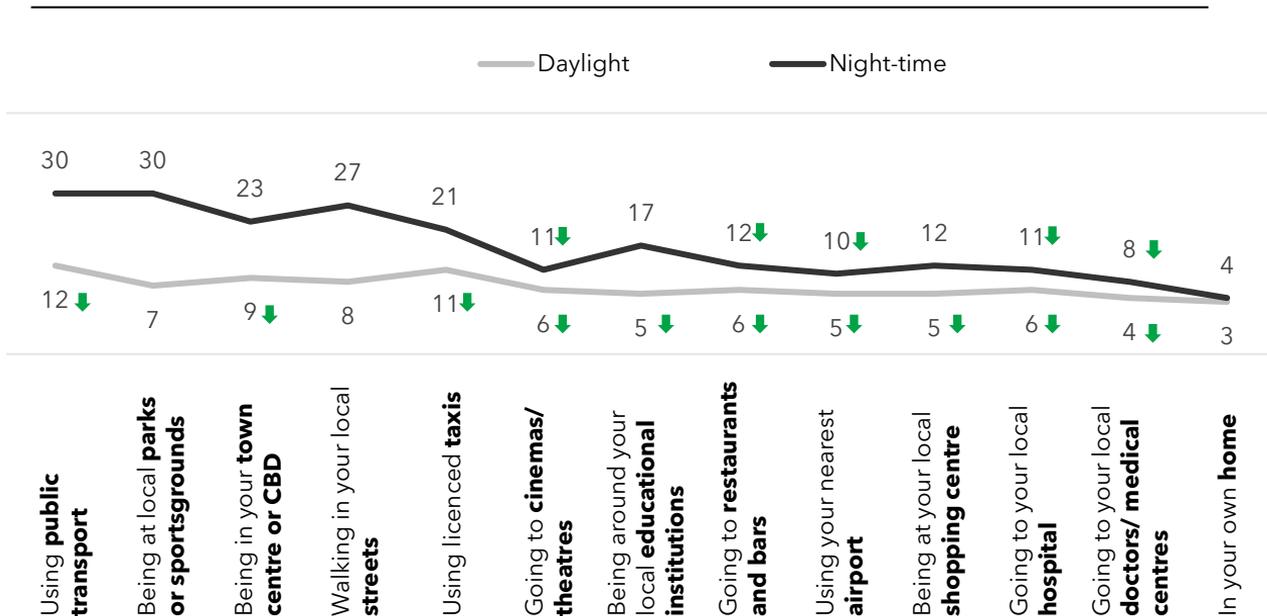
Females again showing heightened safety perception levels on most activities



QA1B. How safe do you feel in these situations: B) During night-time hours?
 Base: All respondents n=1205 Situations based on all respondents excluding those who answered Not applicable (minimum n=972)
 Note. Feel unsafe is based on bottom 3 box on a 7-point scale, where 1 indicates Very unsafe and 7 indicates Very safe

Fears for safety remains significantly higher at night

% of Australians who feel unsafe during daylight and 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

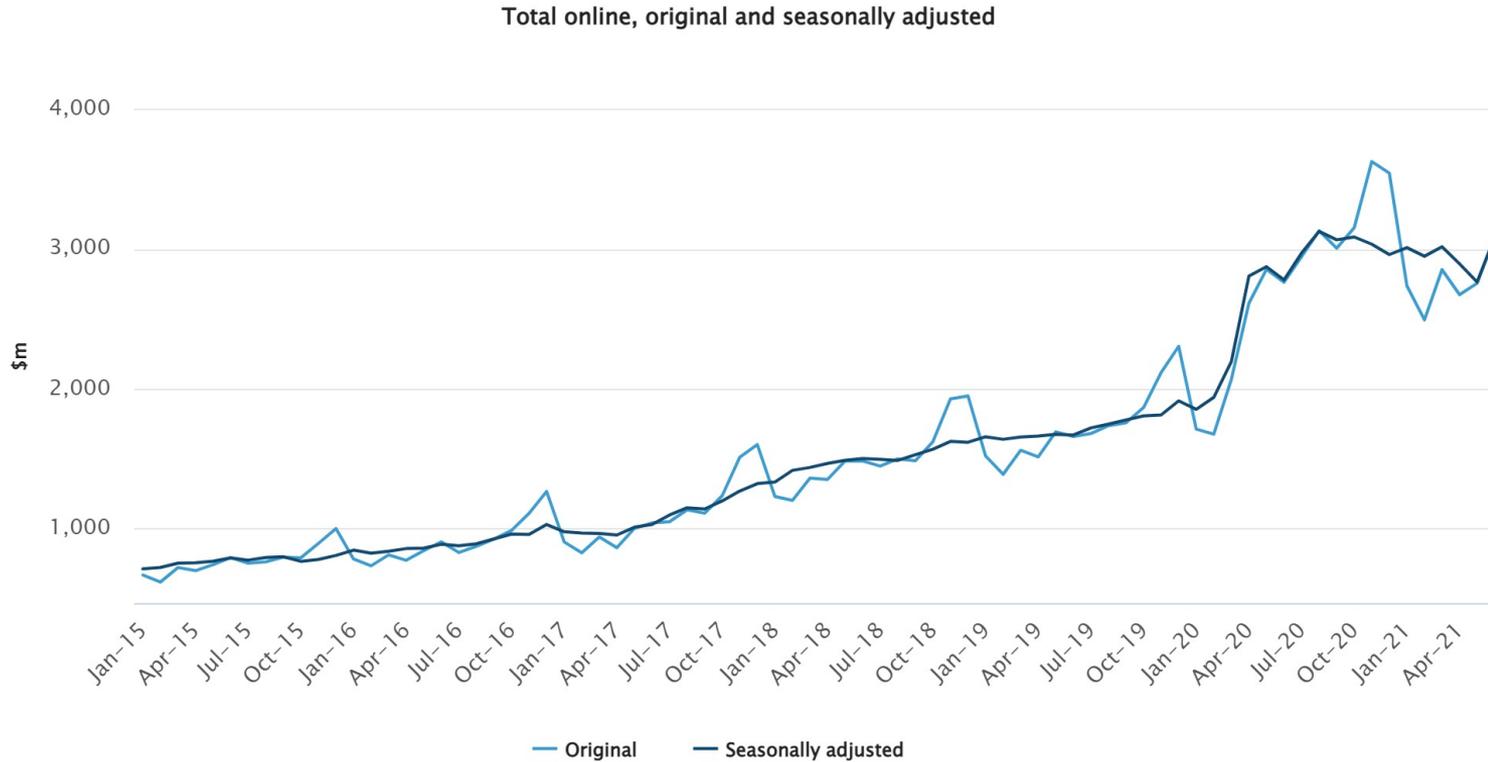


COVID-19

Reducing safety concerns across many activities

The Pandemic sped up Australian's adoption of online shopping

And it is estimated that around 3 in 4 Australian's continue to shop online



Source: Australian Bureau of Statistics, Online sales, June 2021 – Supplementary COVID-19 analysis 4/08/2021

And Cybercrime continues to rise...

According to the latest data:

- The total amount lost in scams for 2022 is \$72,231,217
- New South Wales was hit the hardest with online shopping scams, followed by Victoria
- 84% spike in scams since last year
- Smartphones are the primary delivery method for attacks
- The estimated average cost of cybercrime to the global economy is \$445 billion yearly
- One in four Australians have fallen victim to identity fraud
- Cybercriminals can penetrate 93% of company networks

With some high profile companies not immune to data breaches:



Despite this, Cyber Safety is now less of a concern for Australians

Most commonly Australians fear shopping from foreign retailers, with a large drop in the number of Australian having safety concerns when using social media and shopping from global retailers

Top 3 situations



▶ **31%**
Shopping online from foreign retailers

"As far as shopping online from foreign retailers there is no guarantee I will receive my goods and there is no real comeback."
Female 50+ Brisbane

▶ **17%**
Using social media sites e.g. Facebook or Instagram

"Because social media in itself is corrupt in that social media are constantly monitoring what you are doing."
Male 40-54 Melbourne

▶ **13%**
Shopping online from global retailers e.g. Amazon

"Shopping with Amazon - my credit card is always scammed."
Female 50+ Brisbane

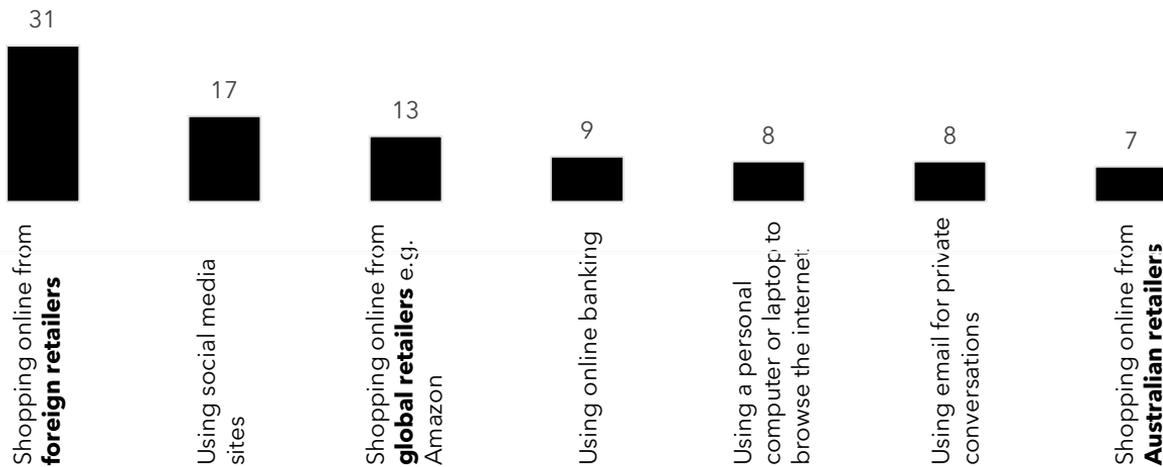
QA2. Now thinking about you personal cyber or online security, how safe do you feel using the following - on any device e.g. home laptop, mobile phone?

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 deemed to be the safest to shop online from with only 7% being concerned

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



40%

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=1205. Situations based on all respondents excluding those who answered Not applicable (minimum n=1134)

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/lower vs. 2022

Older Australians remain more concerned for their cyber safety

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



40%

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=1205. Situations based on all respondents excluding those who answered Not applicable (minimum n=1134)

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

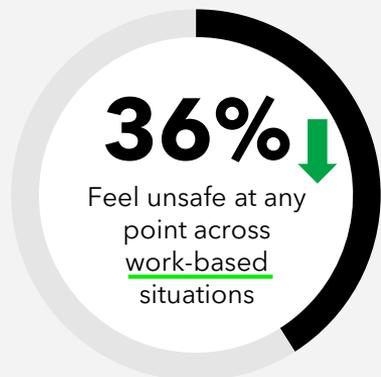
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Significant deviation compared to Total at a 95% Confidence Interval

Top Cyber fears remained the same, however, Australians are significantly more complacent about work based security

Top 3 situations



▶ **21%**

Shopping online from foreign retailers using company IT

▶ **18%** ↓

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

▶ **18%**

Using work email for private conversations

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

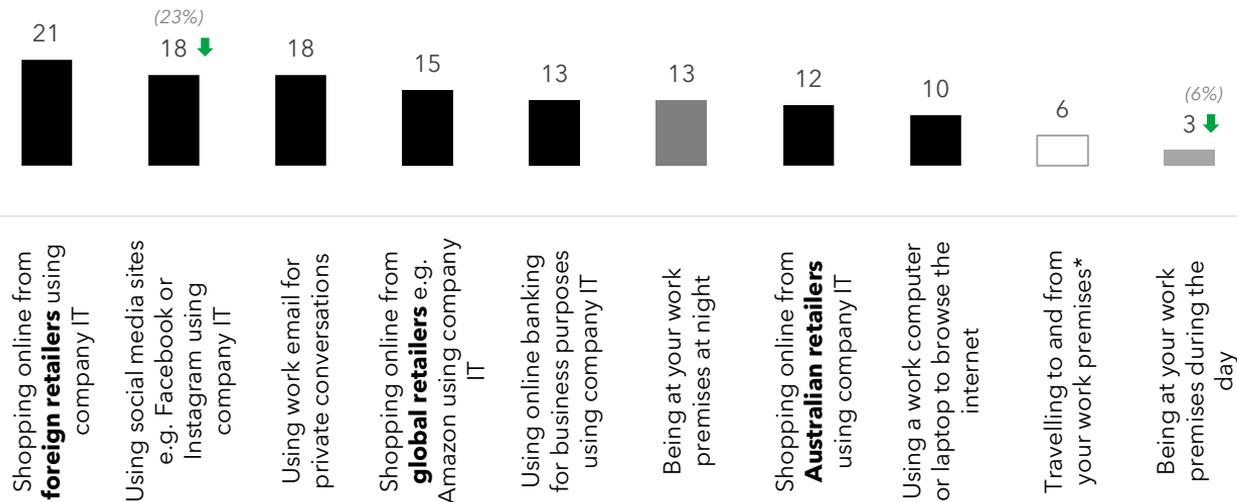
Base: Respondents who are employed full-time or part-time n=?? Situations/activities based on all respondents excluding those who answered *Not applicable* (minimum n=585)

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/lower vs. 2022

Workplace safety concerns have remained relatively stable but there has been a significant drop in safety concerns when using social media at work. Decline in safety perceptions at work during the day is likely due to relaxing attitudes to Covid-19

% of Australians who feel unsafe - Work-based



36%

(41%)

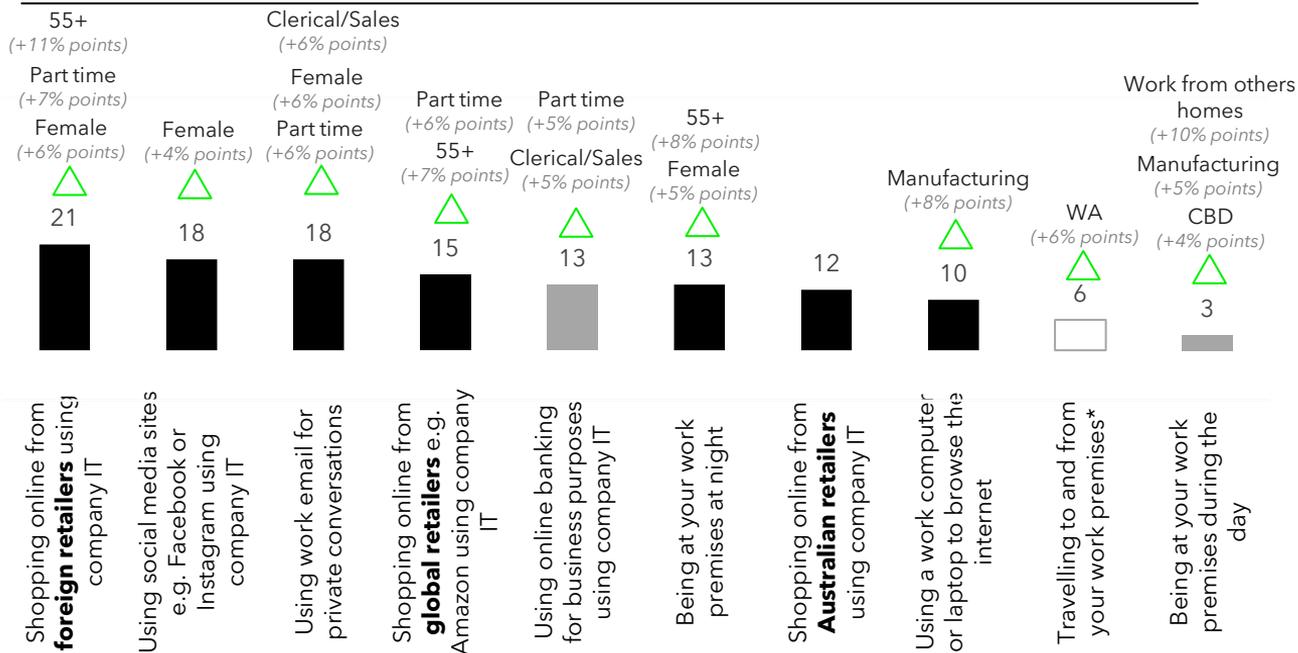


of Australians feel unsafe at some point at work

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=???. *Respondents who travel to/from work n=617
 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. Working from other people's homes now deemed significantly more dangerous

% of Australians who feel unsafe - Work-based



36%

of Australians feel unsafe at some point at work

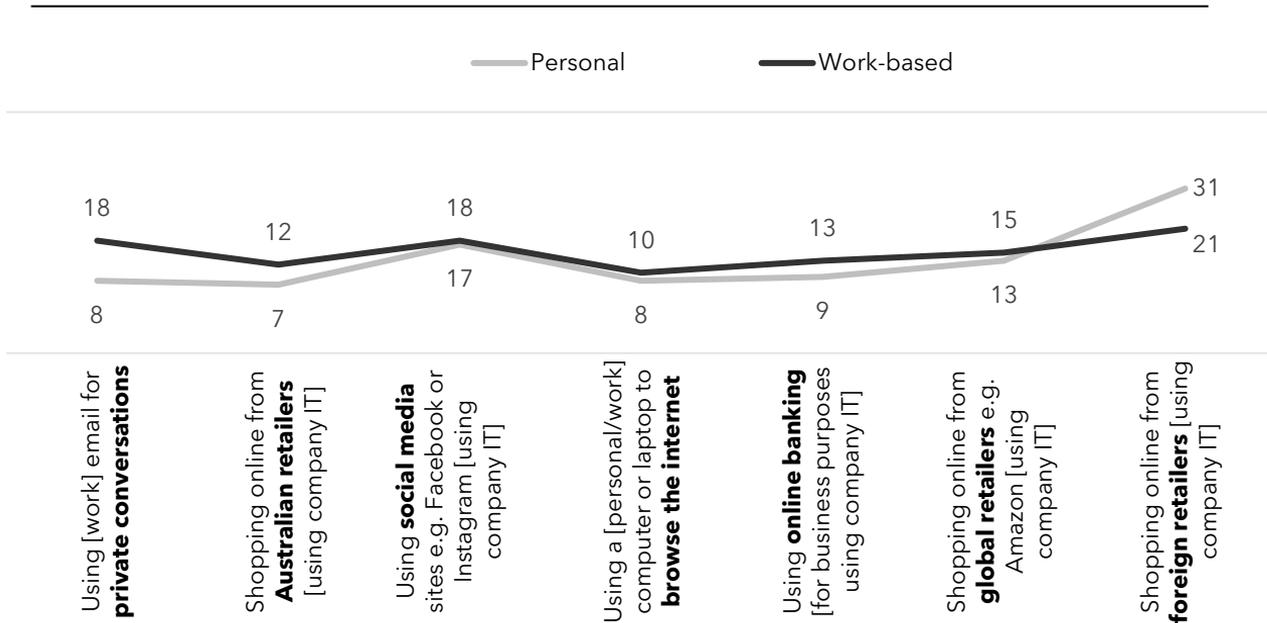


QA3. How safe do you feel at work in the following work-based situations?
 Base: Respondents who are employed full-time or part-time n=918. *Respondents who travel to/from work n=719
 Situations/activities based on all respondents excluding those who answered Not applicable
 Note: Feel unsafe is based 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 Australian's more cautious about using work email for private conversations and shopping from foreign retailers using their own IT

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



18%

Private conversations could be monitored by workplace IT

"I would never use email for private conversations."
Female 40-54 Perth

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=1205.

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=721.

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

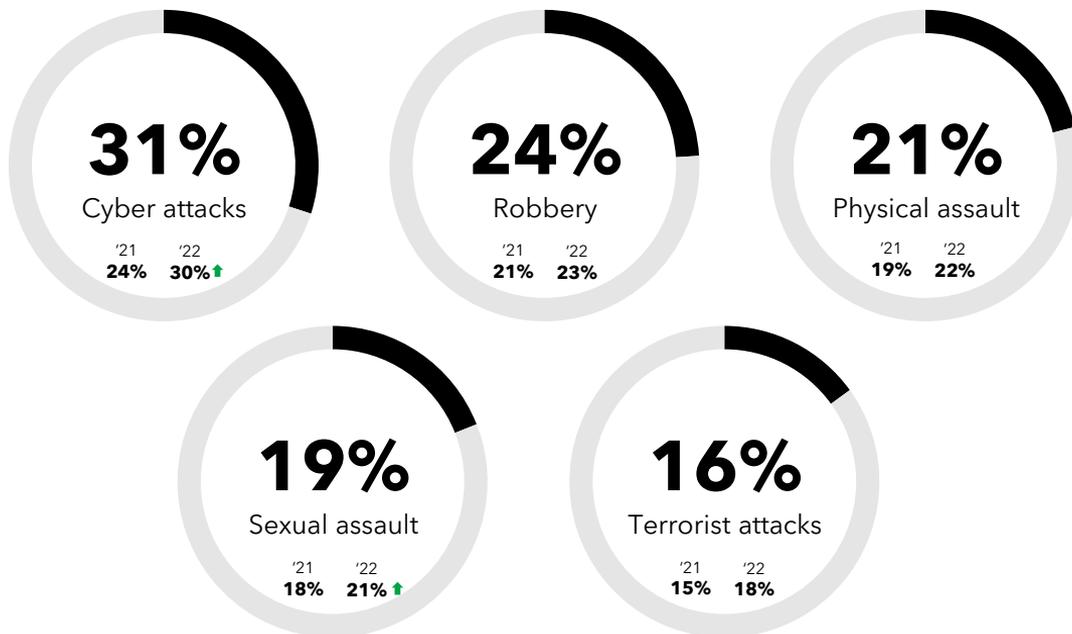


Safety in AUS

Assaults, robbery, cyber
and terrorist attacks

Just under half of all Australians feel unsafe from situations beyond their control. While Cyber attacks remain most top of mind, many still feel safe using work or personal IT in their daily lives

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



46%

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=1205 excluding *Not applicable* (minimum n=1152)

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/lower vs. 2022



Significant deviation compared to Total at a 95% Confidence Interval

Females remain more concerned about these types of security issues

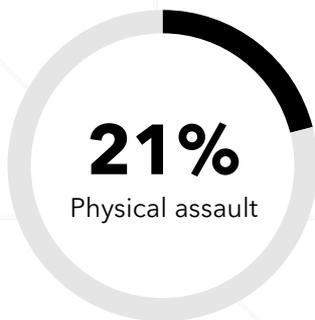
Feel unsafe living in Australia from the risks of...



△ Female (+3% points)
Currently not working
(+3% points)



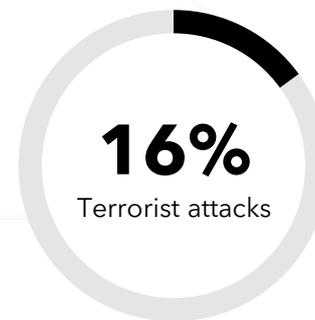
△ Female (+4% points)
Particularly 25-39
Home duties (+15% points)



△ Female (+3% points)
Particularly 25-39 year olds
Five or more in the
household (+9% points)



△ Female (+6% points)
Particularly 18-39 year olds



△ Females (+3% points)
Particularly 55+ year olds
Home duties (+12% points)
Working in manufacturing
(+7% points)



46%

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

Significant vs. total among females, especially 25-39 year olds, those who engage in home duties and working in retail

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=1205 excluding Not applicable (minimum n=1152)

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/lower vs. 2022

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



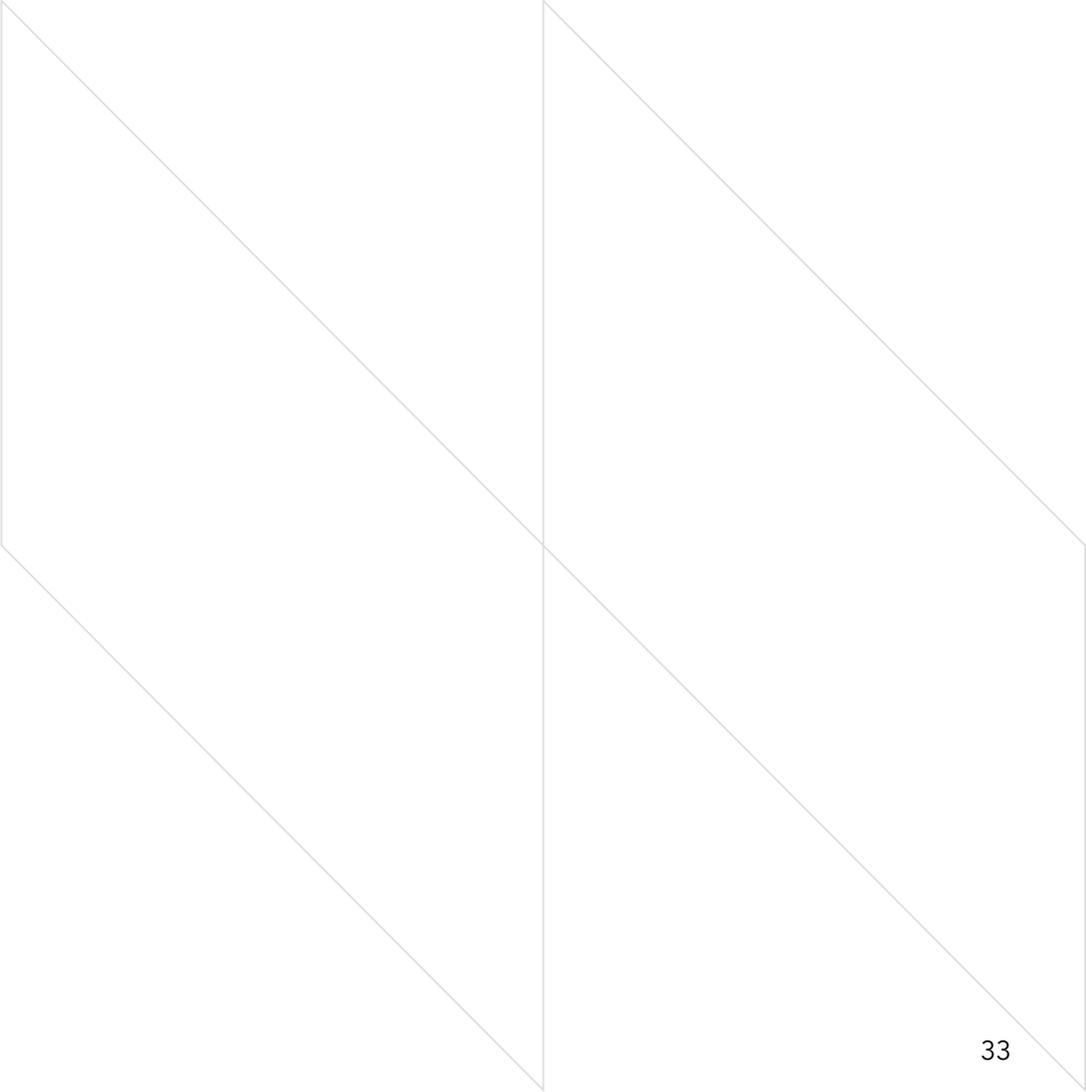
Thank you.

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

"There are always so many drunk people and people just looking to start a fight. You can't even look in someone's direction without them taking it the wrong way. Transit guards aren't patrolling the carriages and you're on your own if something happens in there."
Female 25-30 WA

"I hear too many stories of people being attacked. I would rather drive myself. The main concern would be waiting on bus and train stops waiting to get on the bus and train. I would feel extremely vulnerable."
Female 55+ QLD

"Using public transport at night due to the level of violence by unruly youths and drunks with no protection."
Female 55+ NSW

"Using public transport during nighttime hours due to Violent incidents and unsavory characters on board."
Female 55+ SA

"Lots of people on public transport and over the years have seen things that don't make me feel safe. Don't always feel safe driving with someone I don't know."
Female 25-30 QLD

"Using public transport of a night, particularly trains, as there aren't a lot of passengers and I live towards the end of the line where there's a chance of only one or two passengers being in a single carriage. The stations are unmanned which makes me feel very vulnerable when disembarking."
Female 55+ VIC

"Public transport at any time but more unsafe at night. I would not use PT at night."
Male 40-54 VIC

"Using public transport at night...there are no safeguards for older people travelling alone."
Female 55+ NSW

"I feel most unsafe when there is a crowd around public transport and people have been drinking as it often leads to confrontation."
Female 55+ VIC

"Public transport can have drunk or abusive people on it during those night hours hence it's slightly unsafe and uncomfortable."
Male 25-30 SA

"Using public transport at night. Why? Because youth crime is out of control and the State government is inept at dealing with it."
Male 55+ QLD

"Using public transport at night. Not enough safety at night."
Male 55+ NSW

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

Safety concerns

Transportation particularly using licenced taxis

"I feel more unsafe at nighttime using public taxi services, you never know your driver."

Female 25-30 QLD

"Less than average capable drivers in taxis who maybe in a hurry to get you to your destination so they can get their next ride."

Female 40-54 QLD

"Getting into an unlicensed taxi is a big risk not knowing who they are."

Male 40-54 VIC

"I feel the most unsafe when driving in a taxi no matter what time of the day or night, I'm not sure why this is but my anxiety gets so triggered to the point I have a panic attack."

Female 25-30 NSW

"Nighttime in taxis because you never know what they are thinking."

Female 18-24 SA

"A lot of Taxi drivers are creepy, and I would never catch a taxi by myself.."

Female 55+ VIC

"Using licensed taxis at nighttime, you don't know the driver and how he represents himself. They could be bigger than you and be able to over power you."

Female 25-30 QLD

"Using taxis at night is very unsafe for a woman on her own. She would be at his mercy."

Female 55+ VIC

"I had a bad experience in a taxi a few years ago."

Female 25-30 NSW

"Taxi drivers can be very aggressive, take many risks and drive recklessly, so am not comfortable with them."

Female 40-54 WA

COVID-19 no longer an issue for Australians accessing medical facilities and treatment. Fear is more around violence/ crime and staffing levels

Safety concerns



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



"I don't like hospitals especially emergency as they are so busy and there is not enough staff to look after you."

Female 55+ QLD

"People can be horrible and as I work in a hospital, I see what bad people can do. I know that everyone is not evil but I know some are and we never know who they are until it's too late."

Female 18-24 WA

"Being in hospital at night because of gangs of youths."

Female 40-54 TAS

"Emergency services are so under staffed and resourced."

Male 40-54 NSW

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

"CBD is a dangerous place at night, too many intoxicated people."

Female 40-54 NSW

"Very rarely do I go to the CBD let alone at night but it attracts some undesirables."

Male 25-30 VIC

"Nighttime in CBD. Little police presence and a lot of alcohol and drug problems."

Male 55+ QLD

"I feel unsafe going into the CBD and avoid it because of the undesirable people there."

Female 55+ WA

"At nighttime in the CBD because there is a lot of crime and dangerous people in the city at night.."

Female 18-24 VIC

"During night hours being in the CBD because there is less light, all shops closed, and people don't seem to be up to good."

Female 40-54 VIC

"There are so many people off their face on drugs now. I have lived in the CBD for 20 years and I have never seen so many people on drugs - it is prolific."

Female 25-30 SA

"Being in the CBD at night hours because of the homeless and drug addicted people who inhabit the area and cause trouble"

Female 25-30 WA

"Being in the CBD because of drunken behaviour and criminal activities that happen at these times."

Male 40-54 VIC

"I feel unsafe when there are people around who could be drunk or high like in the CBD or public transport."

Female 40-54 QLD

"There are lots of people around who are drunk or on drugs who are unpredictable and lots of dark spots for people to hide in."

Female 25-30 VIC

"Walking streets at night or being in the CBD. There are a number of people with mental health concerns around who are unpredictable in their behaviour."

Female 55+ VIC

Our parks and sportsgrounds tend to be avoided, moreso at night, due to perceptions of criminal elements hanging around these locations

Safety concerns

Being at local parks / sportsgrounds

"Nighttime hours local sports grounds- not the best place to be within my suburb."

Female 25-30 NSW

"Probably being at local parks - I don't feel safe in the dark when you cannot see all areas of what's around you."

Female 25-30 VIC

"In local parks, very dimly lit and people could be lurking in hidden places with not many other people around."

Female 40-54 NSW

"Being at local parks or sportsgrounds at night - poor lighting in some areas, large groups of people can be intimidating, walking in the dark to/from these locations."

Female 25-30 NSW

"I feel most unsafe during nighttime hours while being at local parks and sportsgrounds because in our Area there's a lot of junkies maybe they will not cause me any harm, but the idea scares me."

Female 25-30 NSW

"I would not walk the streets at night or go to the sports grounds alone."

Female 55+ VIC

"Local parks aren't safe at night as often young people are there doing drugs and drinking alcohol, plus there's plenty of snakes and other wildlife to be wary of."

Male 40-54 QLD

"Being in dark places like sports grounds at night as a woman is dangerous and makes me feel very unsafe, due to stories of assault and murder at similar locations."

Female 18-24 VIC

"Local parks at night as there are some very unruly youths hanging out and we have no Police around and the local Police station is shut."

Male 50+ SA

Nighttime continues to cue danger for many activities, and walking local streets is seen as risky and to be avoided

Safety concerns

Walking in your local streets

"I feel most unsafe around my local streets late at night because there is high crime rate around my area."

Male 18-24 VIC

"I feel unsafe walking local streets at night as you never know who is lurking around."

Female 25-30 QLD

"Walking the local streets because too many people on drugs walk the streets at night."

Female 55+ NSW

"I don't think it is safe to be out walking the streets at night anywhere by myself. Especially in the local streets or parks. I'm not saying where I live isn't a good area, I just wouldn't walk by myself at night anywhere."

Female 55+ QLD

"During night time hours walking local streets. It's just when I have the highest anxiety, I always feel if someone is following me or something bad is going to happen."

Male 25-30 NSW

"Feel unsafe walking in local streets due to the possibility of attack by dogs."

Female 55+ NSW

"I would not walk around my local streets at night alone as I would feel very unsafe. I will do so with my husband, but I don't feel super-safe doing that either."

Female 55+ NSW

"Walking in local streets at night as there are a lot of reports of undesirable people around the area at night."

Female 55+ NSW

"Walking in local streets at night. There are too many undesirable and homeless people."

Female 55+ WA

"Walking local streets alone at night as they are quiet and dark."

Female 55+ SA

"Walking in local streets due to there is a lot of people who are rude and abusive."

Male 18-24 WA

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

Safety concerns

Cyber

"There are a lot of scam websites out there which is my biggest concern."

Male 18-24 QLD

"Online anywhere - you are being tracked."

Male 25-30 NT

"Providing personal details on-line has a reasonable chance of identity theft."

Male 40-54 SA

"Online banking is risky all the time as there are always scammers trying to get your information and I always worry that one day the banking website will be hacked, and I'll lose my money."

Female 25-30 VIC

"I feel unsafe using online banking and shopping due to the risk of identity theft, scams, etc. All of these are regularly in the news."

Female 55+ NSW

"When making purchases and needing to provide personal details. Not sure who will be collecting the data and how it will be used."

Male 55+ QLD

"Shopping online from foreign retailer can be risky as personal details and identity can be stolen and used for Cyber crime. It can also be a fake website that gives hackers an access to personal details."

Female 40-54 WA

"Using online purchase from a retailer is very unsafe. My credit card has been hacked twice in the past year."

Female 55+ NSW

"When I am accessing online sites that are not known to me and I am unsure what protections are available."

Male 55+ QLD

Everything online isn't completely safe, and is getting less so as every day passes, so using it for such a critical and important activity makes me rather nervous."

Male 40-54 VIC

"I am always very concerned about hackers, as it has happened to me before, and that my personal details and banking will be used by the hackers and or sold on the open market."

Male 55+ QLD

"I don't feel it's safe to use digital banking due to cyber crime."

Female 55+ NSW

"Internet where you have to provide personal details. Fear of the many scams that circulate. Particularly if you are not confident with technology."

Female 55+ WA

"While the interest is fantastic for work and study, I also understand that information can leak online, especially private conversations."

Female 25-30 VIC

"It is too open to cyber attacks and money fraud."

Male 55+ SA

There are many examples of actual issues using social media and shopping online but this has not translated into an uplift in concern levels

Safety concerns



Cyber particularly social media

"Facebook sells personal info and have done bad things in the past. Instagram is owned by Facebook so the same applies to that as well."
Male 40-54 NSW

"Shopping online with Facebook, false and misleading adverts for making money during the pandemic have caused many dramas."
Male 55+ WA

"Social media in itself is corrupt in that social media are constantly monitoring what you are doing."
Male 40-54 VIC

"Social media is full of scammers, so you have to be cautious in everything you say and do. I don't like operating under that type of environment."
Female 55+ QLD

"I do not trust social media and use it only to look things up I do not post, like or anything else like that."
Female 55+ NSW

"Social media sites have scammers too and don't put up information on my holidays."
Female 55+ WA

"I do not trust social media and do not use it at all."
Male 55+ NSW

"Always suspicious of information posted on Facebook and Instagram."
Male 40-54 QLD

Cyber particularly online shopping



"Shopping online can be dangerous as you are sharing personal information with people."
Female 25-30 QLD

"Shopping from foreign retailers I don't feel safe because I don't trust to pay them online as these day's cyber crimes are being increased."
Female 25-30 VIC

"I don't like shopping online. I don't trust what I can't see."
Female 40-54 NSW

"Shopping online from foreign retailer because it is not safe, I don't know them. I might be cheated, hacked etc.."
Male 55+ NSW

"Following a lot of news about scams and hacking I prefer not to purchase or browse on foreign retailers websites."
Male 55+ NSW

"Shopping online from overseas. Too many dodgy dealers. Going through 2 refunds now with the bank on goods not as described. Lost my \$\$."
Female 55+ VIC

"I do not trust some of these online shopping site and how they exploit your personal information."
Male 55+ VIC

"I won't shop from foreign websites; Amazon is untrustworthy and will sign up memberships without permission."
Male 55+ NSW

"If you shop online and the products are from China you are not sure who is monitoring your web site.."
Female 55+ NSW

"I feel most unsafe when shopping online from foreign/ unpopular sites as there is a possibility of capturing payment/ bank details for unauthorised use."
Female 25-30 NSW

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

"I feel my private conversations will not be kept private and confidential from my employer."

Male 25-30 NSW

"Company IT having access to personal information and conversations."

Female 25-30 NSW

"I do not use company IT because important private information can be seen by others since you are using company Internet."

Male 40-54 QLD

"Work email is monitored and can be accessed by IT at any moment. It's not secure or private."

Female 25-30 NSW

"Using company IT I feel I am being watched."

Female 18-24 NSW

"Work email use of internet goes through a company server, and it is not safe for private conversations."

Male 55+ SA

"I don't feel safe using work email for private conversations because everything is monitored, and you can never delete any email."

Female 25-30 QLD

"Any use of company IT is a breach of policy."

Male 40-54 NSW

"Wouldn't use company IT for online purchase/ online banking etc. as it could be monitored."

Male 25-30 VIC

"Work times and company it are strictly for work and adding value to the business, so I have trained not to do private or personal things at work."

Male 25-30 NSW



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 and repeated it in 2022.
- The studies 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 repeated the study in 2022 but now there is a need to update the findings in light of another eventful year - Covid still lingering, political changes in Australia and broader global instability as well as a number of high profile cyber attacks - all potentially impacting safety concerns.
- New data 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 #3 2023



Methodology - Online survey conducted as part of the NielsenIQ omnibus



Sample size - N=1,200 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: Thursday 23rd February 2023 to Monday 7th March 2023

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

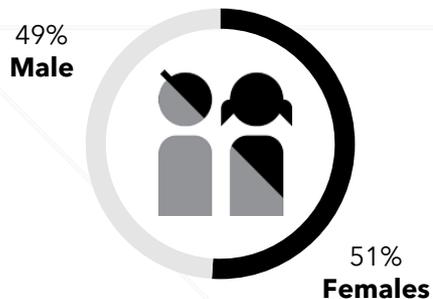
Travelling to and from your work premises

Sample demographics

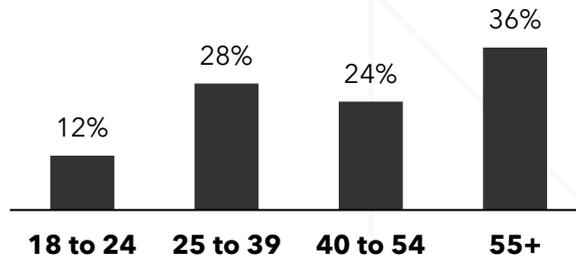
The NielsenIQ omnibus surveys a nationally representative sample across Australia of people aged 18+ and who have access to the internet.

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.