ASCI

Australian Security Confidence Index 2021 Report

March 2021

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Executive summary

Key results from the inaugural ASIAL ASCI research

Key results

Overall safety: While only 5% of Australians feel unsafe overall, this is significantly higher among those aged 40-54, those living in Melbourne, the unemployed, in low personal income households, and those who identify as being of Indian ethnic background.

Despite only 5% of Australians feeling unsafe overall, not many feel very safe either (20%), indicating that there are broad concerns across a range of areas in the lives of Australians.

During daylight OR night-time hours: More than half (57%) of Australians feel unsafe during daylight OR night-time hours. Over a third of Australians (36%) feel unsafe at any point doing day to day activities during daylight hours. This rises to over half (53%) when doing these same activities after dark.

The activities Australians feel most unsafe doing during the day include using licensed taxis (15%), going to the cinema/ theatre (15%) and using public transport (14%).

When it comes to activities during the night, Australians feel most unsafe using public transport (33%), being at local parks/sportsgrounds (31%) and walking in their local streets (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, those not currently employed, and among lower income Australians.

While being at local parks/ sportsground and walking local streets are not a key concern during the day, these rise to become key concerns of Australians at night.

Executive summary

Key results from the inaugural ASIAL ASCI research

Key results regarding living in Australia

38% of Australians feel unsafe living in Australia from the risks of cyber or terrorist attacks, robbery or assault. This is significantly higher among females, 18-24 year olds, the unemployed, and those who identify as being of Chinese ethnic background.

Australians are most concerned about cyber attacks (24%), followed by robbery (21%) and physical assault (19%). As many as 18% are concerned about sexual assault and 15% fear terrorist attacks on Australian soil.

1 in 4 fear the risk of assault (sexual or physical), particularly females, 18-24 year olds, those who are employed part-time, work in retail, are semi-skilled workers, have lower personal or household income, and those who have five or more people in their household.

Cyber attacks (24%): Fear of cyber attacks is significantly higher among those whose work is located in the town centre or CBD. IT workers are equally as likely to fear cyber attacks but more feel very safe (16% compared to 8% total). Regular internet users are also equally as likely to feel unsafe from the risk of cyber attacks.

Robbery (21%): Fear of robbery is significantly higher among females *(particularly 40-54 year olds),* the unemployed or employed part-time, semi-skilled workers, and lower household income Australians.

Physical assault (19%): Fear is significantly higher among females, 18-24 year olds, *(particularly Females 18-24 and 40-54),* the unemployed or employed part-time, semi-skilled workers, retail workers, lower income Australians, large families of 5 or more, or of Indian ethnicity.

Sexual assault (18%): This is higher among females, 18-24 year olds, *(particularly Females 18-54)*, those employed part-time, semi-skilled workers, or in large families of 5 or more.

Terrorist attacks (15%): Feeling unsafe from terrorist attacks is higher for females *(particularly 55+ year olds)*, semi-skilled workers, and Asians (excluding Chinese).

Executive summary

Key results from the inaugural ASIAL ASCI research

Key results regarding cyber and online security

Almost 1 in 4 (24%) Australians feel unsafe from the risk of **cyber attacks** in Australia. While, personal and work based cyber security is a concern for over 2 in 5 (41%) Australians.

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

Personal cyber and online security:
Australian retailers are perceived as being the safest place to shop, compared to nearly a third of Australians feeling unsafe shopping online from foreign retailers. While almost 1 in 5 (19%) are concerned about using social media sites.
Older Australians and females are more likely to be concerned for their personal cyber and online safety.

Work-based situations: Across most situations except for shopping online from foreign or global retailers, safety concerns are higher when using company IT. Females and those aged 55+ are more likely to feel unsafe across work related situations, particularly being at their work premises at night.

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)

Very unsafe 1	2	3	4	5	6	Very safe 7

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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

While 83% of Australians generally feel safe, there are certainly times when this is not the case

Overall safety

■ Feel unsafe ■ Neither ■ Feel safe

5	12	83

"At night and alone. I am a woman, and these appear to be points at which I am most vulnerable."

"Risk of coronavirus anywhere in public."

"Online: security is an illusion, either from hackers or unscrupulous persons hiding behind a, seemingly, legitimate front. Offline: COVID. It could be anywhere, anytime."

"Mostly due to current COVID situation in public areas. Also feel like Facebook and Instagram are accessing too much personal data."

"Walking in local streets because of strangers or people who may do me harm."

"There are to many crimes among the youth today so there are times I'm not feeling safe, also there can be some shady characters about."

"The environment and the changes in our community due to break and enters, robberies, robberies while people are in their own home, more drugs in the community and the increase in crime and violence."

"There are lots of unstable people out there in the world which you come into close contact with. I feel unsafe particularly at night-time in the community on public transport and going to my local hospital. I am also scared of being out at night-time."

"I am worried about going to the doctors because of COVID-19. I think public transport is generally unsafe and not social distanced properly. I think sporting areas, educational institutes and walking the local streets is dangerous if you are a woman at night."

"I feel most unsafe when I'm alone at night-time in spaces that are not overly populated or where I'm in close range of strangers."

Overall safety index

While only 5% feel unsafe, this is significantly higher among certain cohorts

Overall safety

■ Feel unsafe ■ Neither ■ Feel safe

| 5 | 12 | 83 |

△ **7% 40-54 year olds**
8% Males aged 40-54

△ **7% Live in VIC (particularly Melbourne)**

△ **13% Not employed/ Not looking for employment**

△ **11% Low household income (up to $20K)**

△ **11% Identify as Indian**

QA4. Overall, thinking about your day to day life, how safe do you feel? Base: All respondents n=1605
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=1092
© 2021 **Australian Security Industry Association Limited** All Rights Reserved.

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

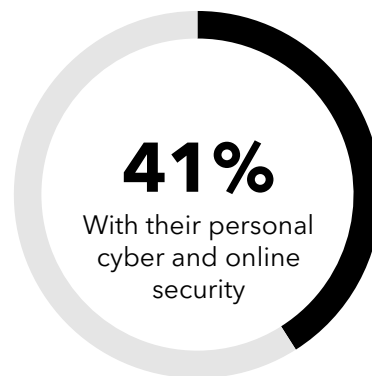# Top 10 situations where Australians feel unsafe in their day-to-day lives

1. Night-time/ Dark
2. Online/ Social media
3. In public areas/ parks or sportsgrounds/ bars or restaurants/ cinemas
4. Walking my local streets
5. Antisocial/ suspicious people around/ groups of youths
6. Being alone/ out alone
7. At risk of being harmed by others
8. Public transport/ buses/ trains/ ferries
9. Fear of catching COVID/ Coronavirus
10. Only cyber security risk (identity theft/ hacking)

Personal Safety

During day and night, in the workplace and online

Australians are most likely to feel unsafe at night
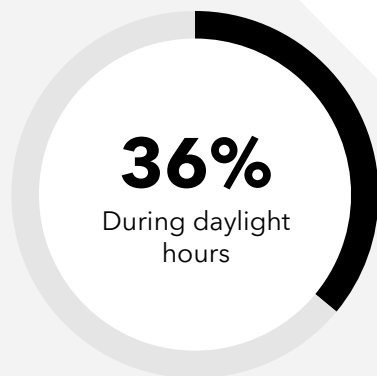
36%
During daylight hours

53%
During night-time hours

41%
With their personal cyber and online security

41%
Work-based situations

As many as 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

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Top 3 situations

▶ **15%**
Using licenced taxis

▶ **15%**
Going to cinemas/ theatres

▶ **14%**
Using public transport e.g. trains, buses or ferries

36%
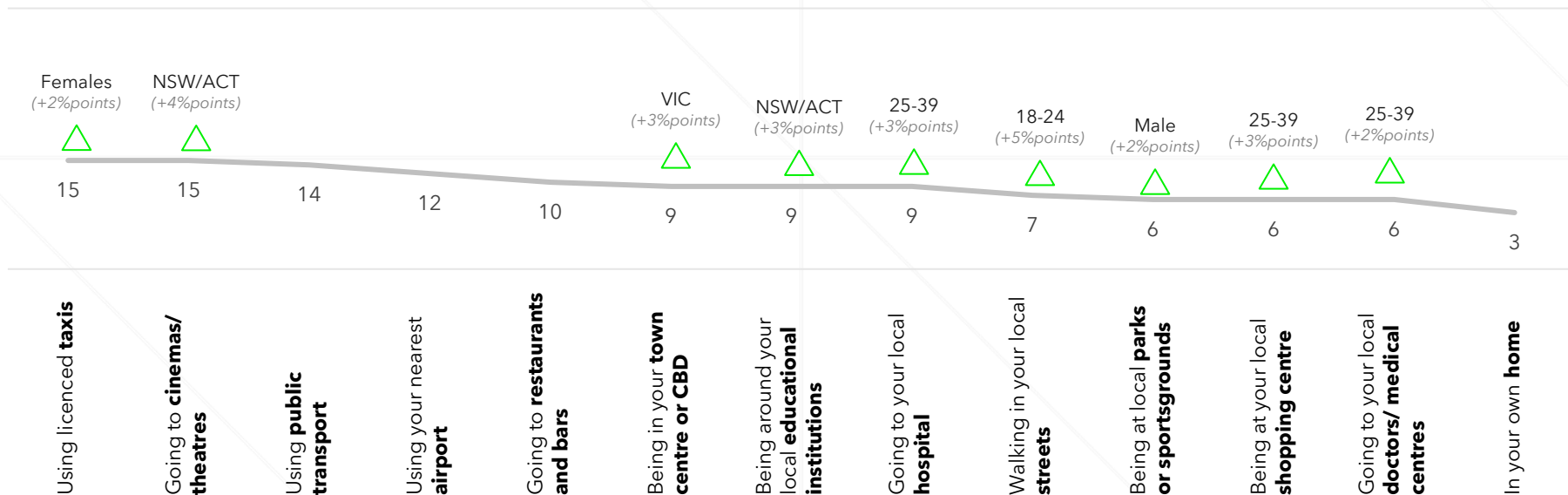Feel unsafe at any point during daylight hours

As many as 1 in 3 feel unsafe going about their daily lives

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

Females (+2%points)	NSW/ACT (+4%points)				VIC (+3%points)	NSW/ACT (+3%points)	25-39 (+3%points)	18-24 (+5%points)	Male (+2%points)	25-39 (+3%points)	25-39 (+2%points)	
△	△				△	△	△	△	△	△	△	
15	15	14	12	10	9	9	9	7	6	6	6	3
Using licenced **taxis**	Going to **cinemas/ theatres**	Using **public transport**	Using your nearest **airport**	Going to **restaurants and bars**	Being in your **town centre or CBD**	Being around your local **educational institutions**	Going to your local **hospital**	Walking in your local **streets**	Being at local **parks or sportsgrounds**	Being at your local **shopping centre**	Going to your local **doctors/ medical centres**	In your own **home**

QA1A. How safe do you feel in these situations: A) During daylight hours?
Base: All respondents n=1605. *Situations based on all respondents excluding those who answered Not applicable* (minimum n=1358)
Note. Feel unsafe is based on bottom 3 box on a 7-point scale, where 1 indicates Very unsafe and 7 indicates Very safe

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

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

With public transport remaining a key issue area and local parks and streets coming into the frame

Top 3 situations

53%
Feel unsafe at any point during night-time hours

▶ **33%**
Using public transport e.g. trains, buses or ferries

▶ **31%**
Being at local parks or sportsgrounds

▶ **26%**
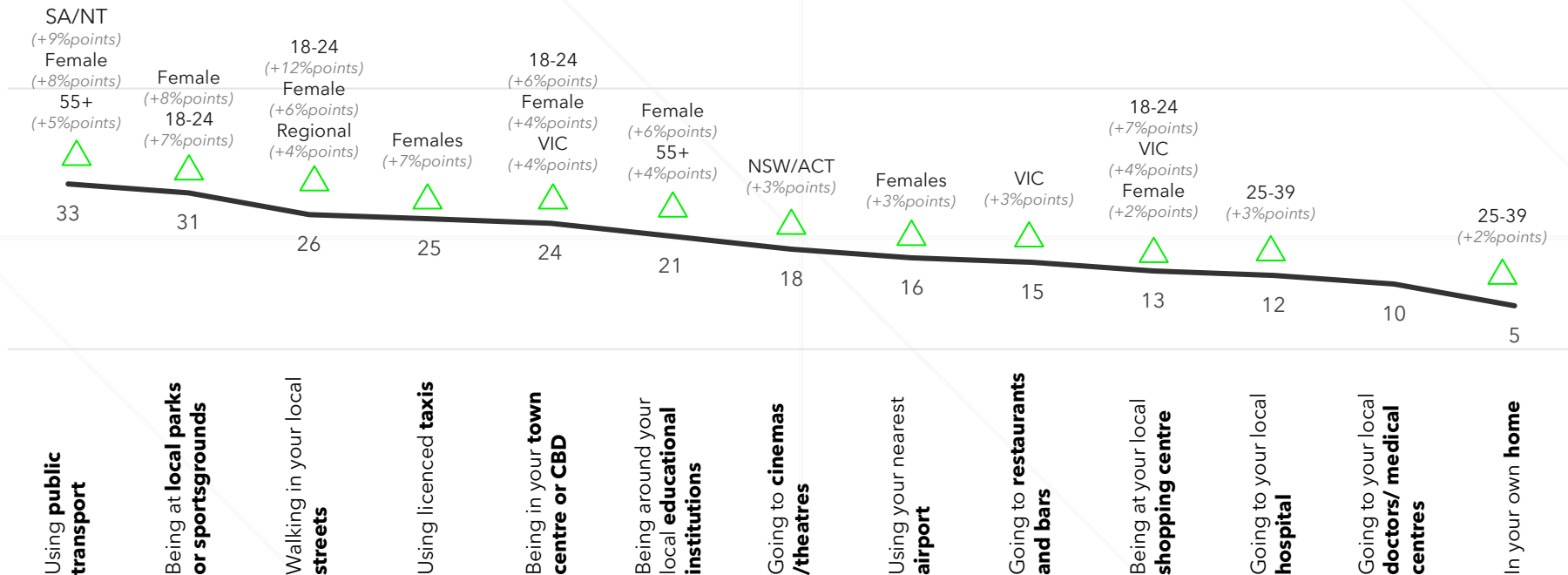Walking in your local streets

QA1B. How safe do you feel in these situations: B) During night-time hours?
Base: All respondents n=1605. *Situations based on* all respondents excluding those who answered *Not applicable* (minimum n=1324)
Note. Feel unsafe is based on bottom 3 box on a 7-point scale, where 1 indicates Very unsafe and 7 indicates Very safe

Over half feel unsafe at any time during the night

With gender, age and regional factors heightening safety perception levels

SA/NT
(+9%points)
Female
(+8%points)
55+
(+5%points)

33

Female
(+8%points)
18-24
(+7%points)

31

18-24
(+12%points)
Female
(+6%points)
Regional
(+4%points)

26

Females
(+7%points)

25

18-24
(+6%points)
Female
(+4%points)
VIC
(+4%points)

24

Female
(+6%points)
55+
(+4%points)

21

NSW/ACT
(+3%points)

18

Females
(+3%points)

16

VIC
(+3%points)

15

18-24
(+7%points)
VIC
(+4%points)
Female
(+2%points)

13

25-39
(+3%points)

12

10

25-39
(+2%points)

5

Using **public transport**

Being at **local parks or sportsgrounds**

Walking in your local **streets**

Using licenced **taxis**

Being in your **town centre or CBD**

Being around your local **educational institutions**

Going to **cinemas /theatres**

Using your nearest **airport**

Going to **restaurants and bars**

Being at your local **shopping centre**

Going to your local **hospital**

Going to your local **doctors/ medical centres**

In your own **home**

QA1B. How safe do you feel in these situations: B) During night-time hours?
Base: All respondents n=1605. *Situations based on* all respondents excluding those who answered *Not applicable* (minimum n=1324)
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 deviation compared to Total at a 95% Confidence Interval
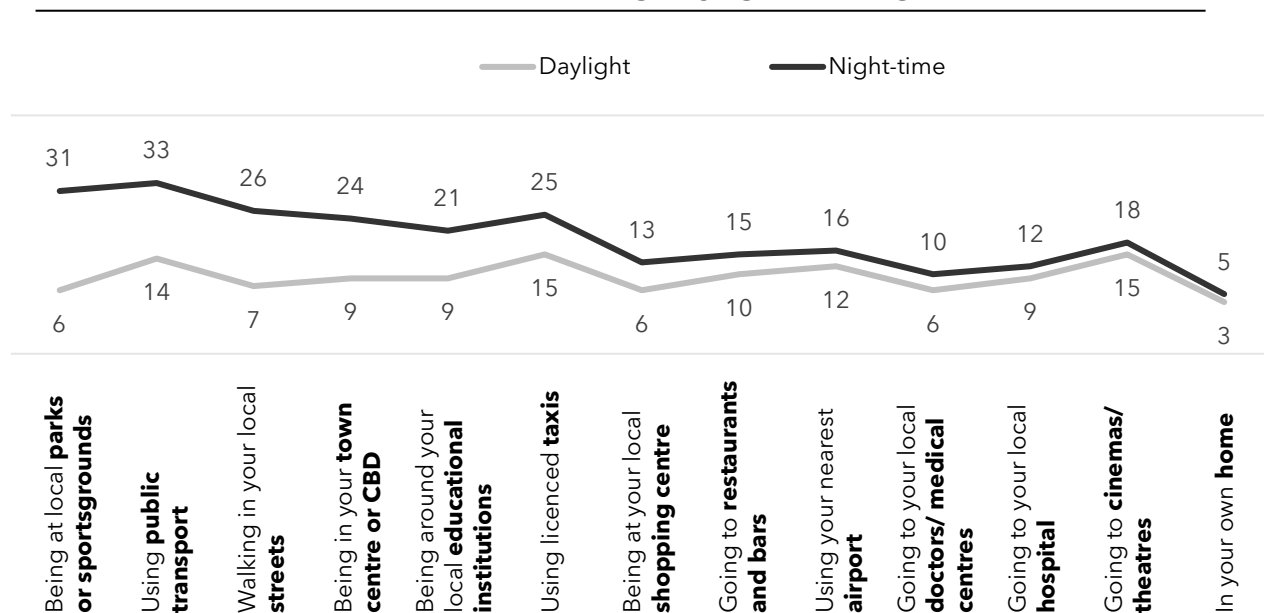
18

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 **daylight** hours	During **night-time** hours
Using public transport		**Females** (particularly 18-24 and 40-54), **55+** (particularly Females)**, SA/NT** *Residence in outer suburbs*
Using licenced taxis	**Females** (particularly 40-54)	**Females** (particularly under 55)
Using your nearest airport	*Residence in rural area*	**Females** (particularly 40-54)
Going to your local doctors/ medical centres	**25-39** (particularly Males)	
Going to your local hospital	**25-39** (particularly Males) *Residence in City/CBD*	**25-39** (particularly Males), Females 40-54
Going to restaurants and bars		**VIC,** Females 18-24
Going to cinemas/ theatres	**NSW/ACT,** Males 55+	**NSW/ACT,** Males 55+
In your own home	Males 25-39	**25-39** (particularly Males), Females 18-24. *Residence in City/CBD*
Walking in your local streets	**18-24** (particularly Females)	**Females** (particularly 40+), **18-24** (particularly Females), Regional
Being at local parks or sportsgrounds	**Males** (particularly 25-39)	**Females** (particularly 40+), **18-24** (particularly Females) *Residence in outer suburbs*
Being at your local shopping centre	**25-39**	**Females** (particularly 18-24), **18-24, VIC**
Being in your town centre or CBD	**VIC**	**Females** (particularly18-24 and 55+), **18-24, VIC,** *Residence in outer suburbs*
Being around your local educational institutions	**NSW/ACT,** Place of residence City/CBD	**Females, 55+** (particularly Females)

Fears for safety while doing certain activities rises when doing these at night

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

─── Daylight ─── Night-time

Night-time values: 31, 33, 26, 24, 21, 25, 13, 15, 16, 10, 12, 18, 5

Daylight values: 6, 14, 7, 9, 9, 15, 6, 10, 12, 6, 9, 15, 3

Categories:
- Being at local **parks or sportsgrounds**
- Using **public transport**
- Walking in your local **streets**
- Being in your **town centre or CBD**
- Being around your local **educational institutions**
- Using licenced **taxis**
- Being at your local **shopping centre**
- Going to **restaurants and bars**
- Using your nearest **airport**
- Going to your local **doctors/ medical centres**
- Going to your local **hospital**
- Going to **cinemas/ theatres**
- In your own **home**

57%

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=1605. *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

Cyber Safety

Over a quarter fear shopping from foreign retailers websites

Top 3 situations

41%
Feel unsafe with personal cyber or online security

▶ **29%**
Shopping online from foreign retailers

▶ **19%**
Using social media sites e.g. Facebook or Instagram

▶ **14%**
Shopping online from global retailers e.g. Amazon

22

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

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

Category	Value
Shopping online from **foreign retailers**	29
Using social media sites	19
Shopping online from **global retailers** e.g. Amazon	14
Using online banking	10
Using email for private conversations	9
Shopping online from **Australian retailers**	8
Using a personal computer or laptop to browse the internet	6

41%
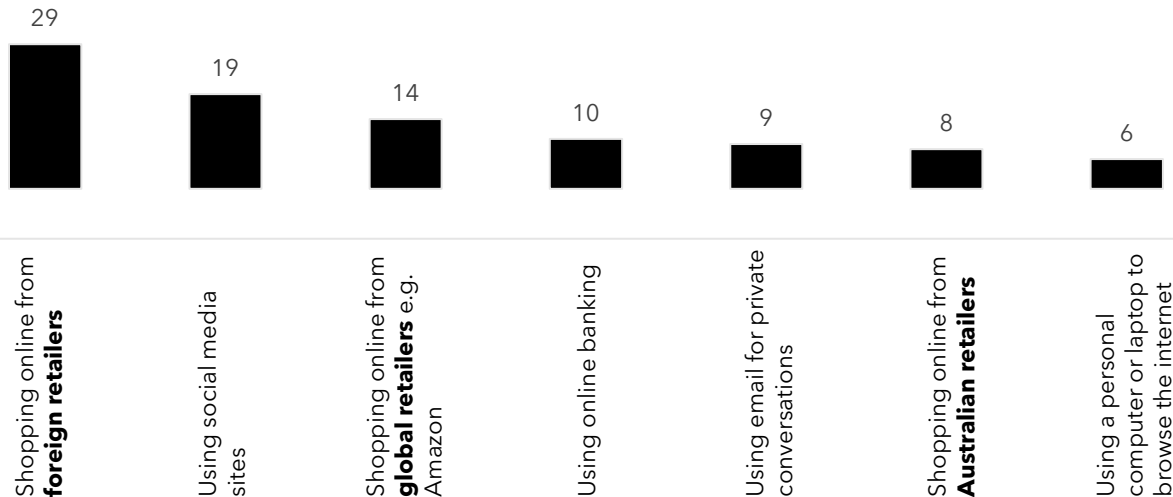
of Australians feel unsafe with their personal online or cyber security

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=1605. *Situations based on* all respondents excluding those who answered *Not applicable* (minimum n=1508)
Note. Feel unsafe is based on bottom 3 box on a 7-point scale, where 1 indicates Very unsafe and 7 indicates Very safe

Older Australians are more concerned for their cyber safety

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

55+
(+8%points)
Females
(+4%points)
△

29

55+
(+10%points)
△

19

55+
(+7%points)
Females
(+2%points)
△

14

55+
(+2%points)
△

10

9

8

6

Shopping online from **foreign retailers**

Using social media sites

Shopping online from **global retailers** e.g. Amazon

Using online banking

Using email for private conversations

Shopping online from **Australian retailers**

Using a personal computer or laptop to browse the internet

41%
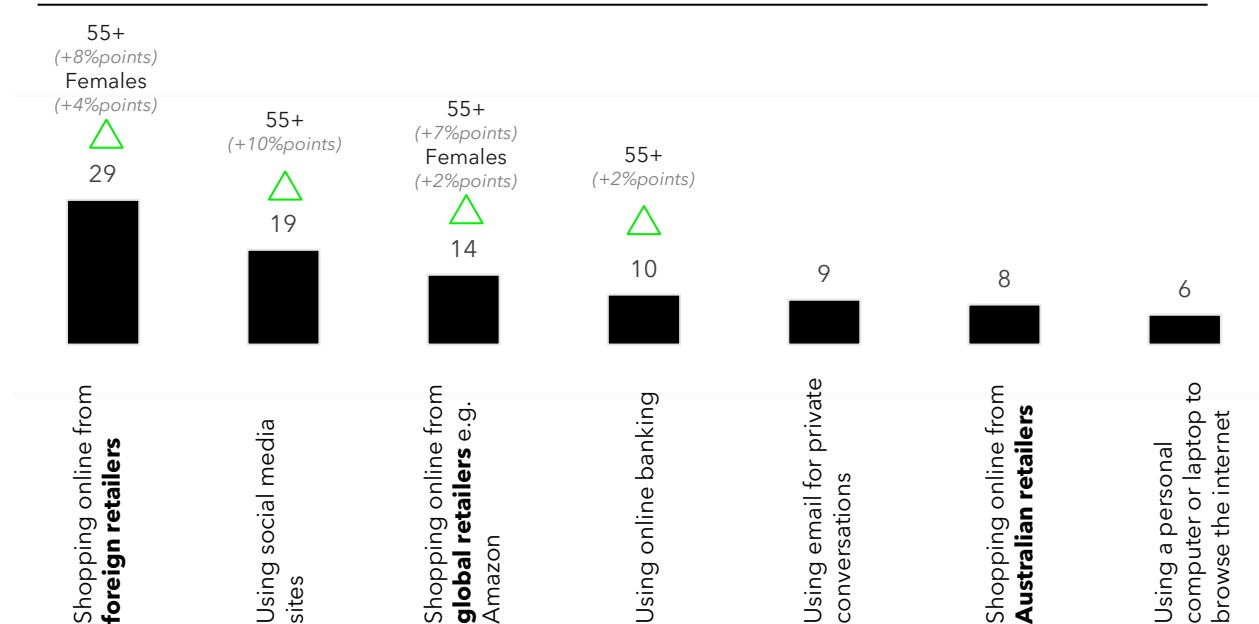
of Australians feel unsafe with their personal online or cyber security... *particularly those aged 55+*

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=1605. *Situations based on all respondents excluding those who answered* Not applicable *(minimum n=1508)*
Note. Feel unsafe is based on bottom 3 box on a 7-point scale, where 1 indicates Very unsafe and 7 indicates Very safe

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

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Top 2 Cyber fears are consistent whether using personal or workplace IT

Top 3 situations

41%
Feel unsafe at any point across work-based situations

▶ **25%**
Shopping online from foreign retailers using company IT

▶ **24%**
Using social media sites e.g. Facebook or Instagram using company IT

▶ **22%**
Using work email for private conversations
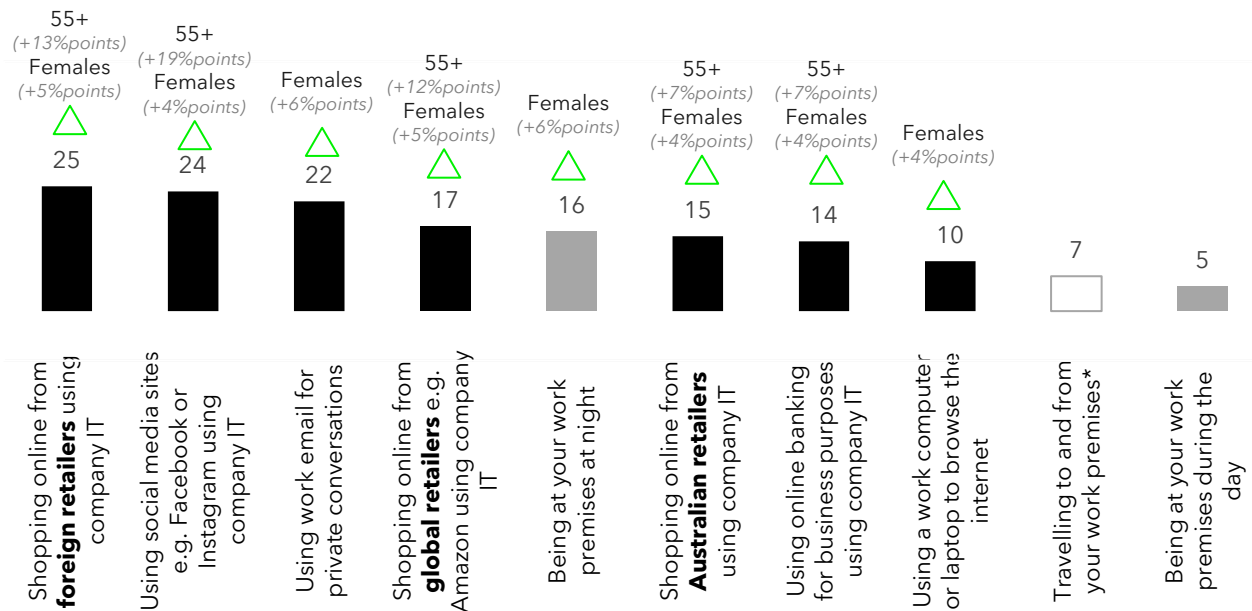
Almost 1 in 5 feel unsafe using work IT for personal conversations

% of Australians who feel unsafe - Work-based

Bar chart values:

- **25** — Shopping online from **foreign retailers** using company IT
- **24** — Using social media sites e.g. Facebook or Instagram using company IT
- **22** — Using work email for private conversations
- **17** — Shopping online from **global retailers** e.g. Amazon using company IT
- **16** — Being at your work premises at night
- **15** — Shopping online from **Australian retailers** using company IT
- **14** — Using online banking for business purposes using company IT
- **10** — Using a work computer or laptop to browse the internet
- **7** — Travelling to and from your work premises*
- **5** — Being at your work premises during the day

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=950. *Respondents who travel to/from work n=771
*Situations/activities based on a*ll 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
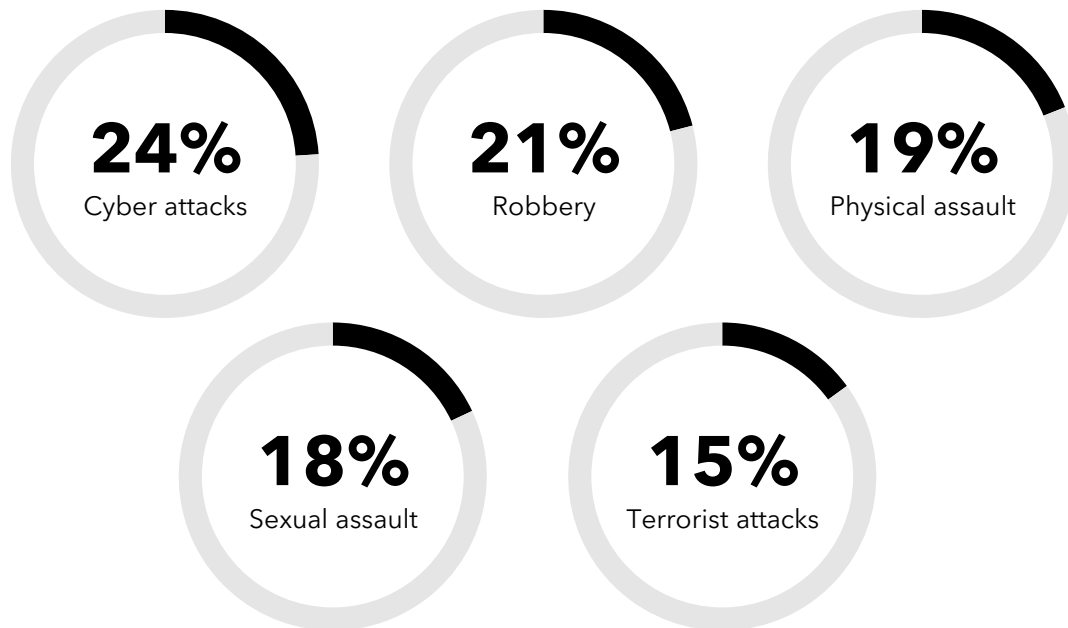
Workplace safety is on the minds of Australian women and older Australians

% of Australians who feel unsafe - Work-based

Category	Value	Deviation notes
Shopping online from **foreign retailers** using company IT	25	55+ (+13%points), Females (+5%points)
Using social media sites e.g. Facebook or Instagram using company IT	24	55+ (+19%points), Females (+4%points)
Using work email for private conversations	22	Females (+6%points)
Shopping online from **global retailers** e.g. Amazon using company IT	17	55+ (+12%points), Females (+5%points)
Being at your work premises at night	16	Females (+6%points)
Shopping online from **Australian retailers** using company IT	15	55+ (+7%points), Females (+4%points)
Using online banking for business purposes using company IT	14	55+ (+7%points), Females (+4%points)
Using a work computer or laptop to browse the internet	10	Females (+4%points)
Travelling to and from your work premises*	7	
Being at your work premises during the day	5	

41%

of Australians feel unsafe at some point at work...*particularly Females*

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=950. *Respondents who travel to/from work n=771
*Situations/activities based on a*ll 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

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

Cyber security is as much of a concern regardless of using personal or workplace IT

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

Personal ——— Work-based ———

Line chart data points:

Category	Work-based	Personal
Using [work] email for **private conversations**	22	9
Shopping online from **Australian retailers** [using company IT]	15	8
Using **social media** sites e.g. Facebook or Instagram [using company IT]	24	19
Using a [personal/work] computer or laptop to **browse the internet**	10	6
Using **online banking** [for business purposes using company IT]	14	10
Shopping online from **global retailers** e.g. Amazon [using company IT]	17	14
Shopping online from **foreign retailers** [using company IT]	25	29

22%

Private conversations could be monitored by workplace IT

Safety in AUS

Assaults, robbery, cyber and terrorist attacks

Over 1 in 3 Australians feel unsafe from situations beyond their control

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

24%
Cyber attacks

21%
Robbery

19%
Physical assault

18%
Sexual assault

15%
Terrorist attacks

38%

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

CBD workers are more cognisant of cyber attacks while women are more likely to feel unsafe from assaults and robbery

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

24%
Cyber attacks

△ Place of work in a location in the town centre or CBD *(+5%points)*

21%
Robbery
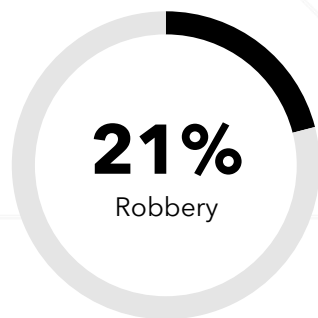
△ Female *(+3%points)*
Particularly 25+ and 40-54 year olds

19%
Physical assault
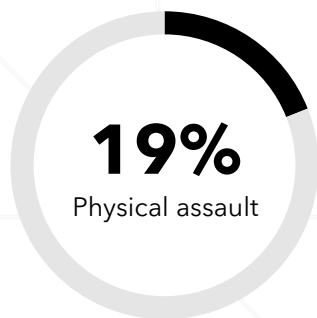
△ Female *(+4%points)*
Particularly 40-54 year olds
18-24 *(+10%points)*
Particularly Females

18%
Sexual assault
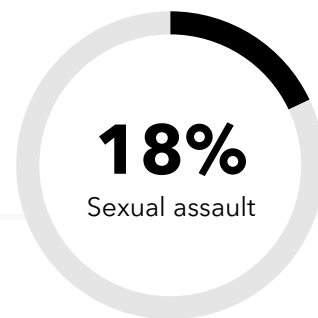
△ Female *(+7%points)*
Particularly Females under the age of 54
18-24 *(+9%points)*

15%
Terrorist attacks
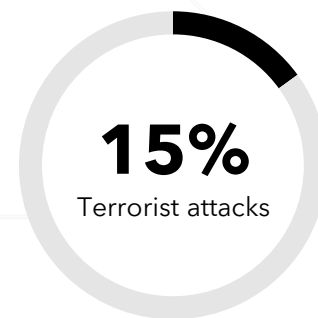
△ Females *(+3%points)*
Particularly 25+ and 55+ year olds

▶▶▶ **38%**
of Australians feel unsafe living in Australia from the risks of attacks, robbery or assault
Particularly Females, 18-24 year olds, People looking for employment and those not employed/not looking for employment

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=1605 excluding Not applicable (minimum n=1522)
Note. Feel unsafe is based on bottom 3 box on a 7-point scale, where 1 indicates Very unsafe and 7 indicates Very safe

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

Thank you.

Appendix I

Verbatim comments

Public transport is mainly a concern during night-time hours due to the types of people, risk of harm and lack of security presence

Safety concerns

" Using public transport "

"Night- time using public transport of within the city. Intoxicated people make me feel uneasy and there often is not much police or security presence" *Female 25-39 QLD*

"During Night-time hours - Using public transport e.g. trains, buses or ferries This when you get people who you can not trust, who may have a criminal background who may want to steal your purse etc." *Female 40-54 WA*

"Night- time using public transport as there are some unstable and creepy people" *Female 25-39 NSW*

"At night-time, at the train station. There's been incidents of stabbings in nearby train stations before" *Male 18-24 VIC*

"Public transport at night. The lack of supervision worries me + lack of social distancing." *Male 55+ QLD*

"Using public transport at night. Behaviour of other travellers" *Female 55+ VIC*

"Public transport at night because of repeated bashings etc on the local train service" *Male 55+ QLD*

"If I was to be in the CBD or on public transport at night I would feel unsafe because night-time is when the crazies come out. Alcohol and drug use is more prevalent at night-time and can lead to aggression and violence." *Male 55+ WA*

"I would avoid any public transport in the evening, there can be a lot of people that I would not like to be around" *Female 55+ SA/NT*

"There can be homeless people or people who have mental health problems or on drugs in the CBD or on public transport at night" *Female 55+ SA/NT*

"There are too many idiots catching public transport." *Male 55+ SA/NT*

"Being in public transport as there are not enough people in the carriages on the train or at the stations…" *Female 55+ VIC*

"Using Public Transport including Taxis. I feel trapped in a vehicle with a strange man. Public Transport makes me feel very unsafe because a dangerous situation could occur instantly e.g.- people on drugs, youth violence, racism. People, mostly men I'm afraid are too unstable these days." *Female 40-54 QLD*

"Catching public transport. This is because there is a lot of people on trains and buses that like to cause trouble and most of the time security guards are standing together on a different carriage" *Male 25-39 SA/NT*

"Using public transport because there are far too many weirdos and people high on drugs" *Female 25-39 VIC*

There is a level of vulnerability and distrust felt getting into a car with a stranger

Safety concerns

" Transportation particularly using licenced taxis "

"I feel most unsafe in licenced taxis during night-time hours due to previous experience of harassment by taxi drivers."
Female 18-24 NSW

"Taxi's. Just some stories told (old and new) are sometimes hard to forget. Sometimes taxi drivers take advantage of the area that you don't know." *Female 40-54 NSW*

"Using taxis during [night] time hours. A lot of the drivers are from countries where sexual assault and violence against women is out of control and goes unpunished."
Female 25-39 NSW

"At night in taxi based on personal negative experience with driver." *Female 55+ 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*

"Taxis because of the stories you hear."
Male 18-24 QLD

"Night-time in taxis as I don't feel I trust foreign drivers..." *Female 25-39 QLD*

"Using licenced Taxis as we hear a lot of incidents about taxis." *Female 55+ NSW*

"Using public transport at night - there are no official people to stroll the public transport - we need more security day and night.   In the past I have not felt safe in a taxi, the driver either talks too much or you cannot understand him. Some try to take advantage in the way they travel to where you want to go." *Female 55+ VIC*

COVID-19 has brought a new consideration to feeling safe around medical institutions

Safety concerns

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

"Night-Time Hospital as this is the time period and location where there is most uncertainty to how safe I am going to be because night-time hospital would likely see a lot of unexpected things which have happened to patients which is the reason they are there at night and not at day so that appears very unsafe for me."
Male 25-39 NSW

"… Going to hospitals make me feel uneasy."
Male 25-39 VIC

"There are lots of unstable people out there in the world which you come into close contact with. I feel unsafe particularly at night-time in the community on public transport and going to my local hospital. I am also scared of being out at night-time."
Female 40-54 WA

"Bacteria and virus all around hospital and medical centre" *Male 25-39 VIC*

"Hospital because of coronavirus…"
Male 25-39 QLD

"I am worried about going to the doctors because of COVID-19…" *Female 18-24 QLD*

"…doctors or hospitals where there is a high risk of contracting the virus…" *Male 40-54 QLD*

"Probably going to my local doctors and hospital in case someone there might be infected with COVID and I may catch it."
Female 40-54 VIC

"Well I put Hospitals as a high concern, thinking about COVID currently…"
Female 25-39 SA/NT

"Going to the hospital for fear of contracting COVID-19." *Male 25-39 VIC*

"I feel unsafe in crowded spaces and airport and hospitals because of COVID…"
Male 25-39 SA/NT

▶▶▶ **The current pandemic / COVID-19 is causing some Australians to feel unsafe visiting their local doctors/ medical centres/ hospitals… particularly Males aged 25-39**

Key concerns around COVID-19 include being in crowded or enclosed spaces or where cases are entering the country from overseas

Safety concerns

" Global pandemic/ COVID-19 "

"I am most concerned about public complacency in the face of a global pandemic. Social distancing is not being observed and the use of face masks is barely noticeable" *Female 55+ ACT*

"Wary of COVID restrictions and not sure if they are following hygiene protocols" *Male 55+ NSW*

"I feel most unsafe because of the pandemic called covid-19 going on around the globe." *Female 18-24 VIC*

"The coronavirus pandemic." *Male 40-54 NSW*

"In a crowd due to COVID-19." *Female 40-54 NSW*

"Crowded rooms because the virus spreads easily." *Male 55+ ACT*

"I worry about getting COVID so I avoid these places." *Female 40-54 QLD*

"There is always the chance people will be out and I could catch COVID from someone or something." *Female 25-39 NSW*

"Being in crowded spaces due to people not social distancing and the risk of COVID." *Female 40-54 NSW*

"In people gathering situation I feel most unsafe and main cause is COVID-19." *Female 40-54 NSW*

"Mostly at night in crowded places because of the pandemic and social distancing." *Male 55+ NSW*

"In this time of the pandemic it is not safe to go to cinema." *Female 25-39 NSW*

"I don't feel safe in cinemas and theatres due to the increased risk of catching COVID-19." *Male 55+ VIC*

"Chance of getting covid 19 at cinemas..." *Male 55+ TAS*

"Airports because of the COVID virus" *Female 55+ QLD*

"Airports I'm concerned about COVID…" *Female 40-54 QLD*

"Due to COVID I feel unsafe being somewhere with crowds of people. I feel unsafe at the airport due to COVID cases now being overseas travellers." *Female 25-39 NSW*

"I feel unsafe using public transport at night partly because of COVID-19 and also because there can be more dangerous people at night" *Female 25-39 NSW*

"I feel unsafe using public transport in the times of this pandemic..." *Male 55+ QLD*

"On public transport and in cinemas due to COVID-19." *Male 40-54 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

"Sometimes being in the CBD at night can be quite unsafe, due to other individuals possibly drunk/on drugs." *Male 18-24 NSW*

"Being in the CBD alone at night-time - I would really never do it because I feel too vulnerable being a female, alone and in the same" *Female 18-24 VIC*

"Night-time in the CBD because There are dodgy people around every corner." *Male 18-24 WA*

"I feel very unsafe about being in the City of a night. There are too many young people who want to steal, assault and do other crimes because there are no consequences for their actions…" *Female 55+ QLD*

"On my own at night-time in the city. Because I see on the TV what can happen being on your own." *Female 25-39 VIC*

"Night-time in CBD. Lots of strangers." *Male 18-24 VIC*

"Being in CBD during night hours is most dangerous, drug addicts are out and quite violent, and all COVID-19 rules are not followed, police do not respond to any incidents unless there is revenue involved." *Female 55+ VIC*

"Being in the CBD at night because you just never know what might happen." *Female 25-39 VIC*

"There is far too much crime in the city. There is no police and no prison for criminals" *Male 40-54 VIC*

"Our local CBD is where most of the nightclubs and bars are so been around them at night when people have been drinking is not a very safe thing to do especially alone although there is a police presence at these places." *Female 40-54 QLD*

"Most unsafe being in CBD - lots of alcohol/drug using people and no safety." *Female 25-39 WA*

"I feel the most unsafe when I'm alone, especially at night-time in parks or CBD. I feel even more unsafe if there a lone men around me, or groups of men." *Female 18-24 WA*

"In parks or CBD at night can't see well enough not enough lighting or people around not enough Police presence" *Female 55+ SA*

"There can be homeless people or people who have mental health problems or on drugs in the CBD or on public transport at night." *Female 55+ SA/NT*

"If I was to be in the CBD or on public transport at night, I would feel unsafe because night-time is when the crazies come out. Alcohol and drug use is more prevalent at night-time and can lead to aggression and violence." *Male 55+ WA*

Lack of proper lighting and perception of unsavoury types being about make parks feel unsafe, particularly at night

Safety concerns

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Being at local parks / sportsgrounds

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"…most parks, sports grounds and schools are unattended at <u>night</u> so I would be a little scared" *Female 40-54 QLD*

"Most parks aren't well lit at <u>night</u> and don't have a lot of people around" *Female 18-24 VIC*

"…Being at local parks or sportsgrounds, you don't know who is around" *Male 55+ VIC*

"Being at local park at <u>night-time</u> as I am not sure who else might be in the area and as at night-time there is not many people out and about I can get help or attention from in the event someone chooses to do me harm or attack me and if the know I am female of petite build I probably would be seen as an easy target." *Female 40-54 WA*

"Definitely in parks at <u>night</u> as its easy for abductions/murder" *Male 18-24 VIC*

"Walking in parks and streets alone <u>after dark</u>, as this is when the criminals are out looking for an easy target." *Female 55+ VIC*

"…Also parks and sportsgrounds at <u>night</u> isn't a very good idea either as there could be people staying there and don't want to be disturbed, it could be as harmless as a homeless person sleeping or others doing drugs or drinking." *Female 40-54 QLD*

"Being around at parks and sports ground at <u>night</u> because there are not much security and dark." *Female 40-54 VIC*

"I would never go to my local parks or sportsgrounds at <u>night</u>. They lighting is usually not very good and it feels very spooky and there are not usually other people around." *Female 55+ VIC*

"Local <u>streets</u>, parks and sportsgrounds. I do not see police officers or security cameras" *Males 40-54 NSW*

"I generally avoid parks at <u>night</u> as they're not safe for women, in particular, at night." *Female 25-39 QLD*

"During <u>Night-time</u> hours - Being at local parks or sportsgrounds As a young woman, this is the scariest thing for me. The reason why is clear… fear of something happening. I don't feel comfortable talking about it." *Female 18-24 WA*

"…Walking in the <u>streets</u> and in local parks/sportsgrounds due to the possibility of kidnapping or an attack from someone" *Male 18-24 NSW*

"Because be female and out alone around parks and schoolgrounds is not a safe thing to do unfortunately" *Female 40-54 SA/NT*

Night time cues danger for many activities

Safety concerns

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Going to restaurants / bars

"Restaurant and bars at <u>night</u> because people are scary especially with alcohol and drugs involved" *Female 18-24 VIC*

"At a bar at <u>night</u> as it has always been unsafe and unpredictable" *Female 40-54 VIC*

Going to cinemas / theatres

"Wouldn't want to go to cinema etc at <u>night</u>. Can be crowds of youths hanging about" *Female 55+ QLD*

"Being in close proximity to other people in large crowds or confined spaces like large shopping centres, public transport and cinemas" *Male 55+ NSW*

Walking in your local streets

"Walking in your local street because you never know who you're going to come across mostly scared of creepy guys" *Female 18-24 QLD*

"Working in my local streets at <u>night</u>, especially being a woman. This is as there is some weirdos and creeps out there" *Female 18-24 VIC*

"Walking on the street during <u>night-time</u> because I'm a woman and afraid of men and harassment." *Female 18-24 SA*

"Walking in local streets at <u>night-time</u> because anything can happen and go badly." *Female 18-24 NT*

"In the streets at night because there could be dangerous people hanging around." *Male 18-24 NSW*

"Walking in local streets because of strangers or people who may do me harm" *Female 25-39 VIC*

"Walking in my local streets is very unsafe in my area. Lighting is bad so you are unable to see very clearly if anyone is about" *Female 55+ NSW*

"I don't like being out walking the streets at night just as a precaution there is no point in putting yourself in danger" *Female 55+ QLD*

"Walking in the streets at <u>night</u> here is not advisable as there are a lot of uncertainty with the youths in the area." *Female 55+ QLD*

"At night-time because of drunk and aggressive people. You don't know who is around you and the streets etc aren't well lit..." *Female 40-54 WA*

"When I am walking home at <u>night</u> and it is after dark as this is the time when there are drunk people around who are itching for a fight." *Male 25-39 VIC*

There is a real anxiety of having personal information stolen and misused when using the internet

Safety concerns

Cyber

"Personal information exposed on internet, risky at anytime particularly since personal data is very 'tradeable' and is utilised to target advertising" *Male 55+ SA/NT*

"The internet is a dangerous place and very easy for hackers/government to get all your info" *Male 18-24 NSW*

"Feeling unsure about whether they are legit sites or if my details are going to the right people or scam sites. I also worry about being tracked online." *Female 40-54 QLD*

"I am concerned about online credit card fraud, identity theft, and paying for substandard products that do not match what is advertised." *Male 55+ SA/NT*

"Financial details being leaked, untrusted websites" *Female 40-54 WA*

"The risk of having any personal info stolen" *Male 18-24 QLD*

"I don't use online banking personally for security, data privacy and safety reasons." *Male 55+ QLD*

"Do not feel that my personal data will be correctly stored and used." *Female 55+ WA*

"Security of personal data, loss of important information" *Male 25-39 NSW*

"Any site where I have to provide banking and other personal details. There is no way of knowing if the site is secure or the vendor is trustworthy with personal details. It is not unknown for business to sell their email contact lists to others." *Male 55+ QLD*

"...have been hacked so I will not use online banking, only feel safe using PayPal with eBay..." *Female 55+ NSW*

"Using my password that maybe someone can easily have access to it. Plus, I'm not that good in technology so I don't really know how to protect myself from it although I tried to follow instructions, I still feel not safe using online banking apps." *Female 55+ NSW*

"...I don't trust the sites with my information such as payment, address etc" *Male 55+ WA*

"Online: security is an illusion, either from hackers or unscrupulous persons hiding behind a, seemingly, legitimate front..." *Male 55+ VIC*

There is a distrust of foreign retailers and social media sites to do the right thing by Australians

Safety concerns

Cyber particularly social media

"Using social media because of the hacks of data and infiltration by undesirable criminal and extreme political elements" *Male 55+ SA*

"Social media is inherently unsafe, fake news, scams etc." *Male 40-54 NSW*

"Using social media, people who own platforms are using it to their advantage I themselves are not trustworthy or morally good" *Male 55+ TAS*

"…I would not use social media as there are too many avenues for incorrect behaviour on those sites" *Female 55+ NSW*

"…Also feel like Facebook and Instagram are accessing too much personal data" *Female 25-39 QLD*

"Facebook has been reported as an intrusion of privacy in general" *Female 40-54 SA/NT*

"Facebook uses your data and location for its own use" *Male 55+ QLD*

"Social media platforms track you" *Male 18-24 NSW*

"I don't trust social media sites" *Female 55+ VIC*

Cyber particularly online shopping

"Shopping online from foreign retailers has no guarantee of sufficient security standards and may be fake goods. Using work devices for personal reasons is discouraged." *Male 50-54 NSW*

"I don't feel safe because, I'm ordering out of the country, always wondering if they will arrive. And I have been ripped off from outside sellers." *Male 40-54 QLD*

"…And shopping from foreign retailers I don't know if they are going to have hidden charges and of are trustworthy." *Female 18-24 SA/NT*

"Shopping online from foreign retailers as I do not know who or what I am dealing with." *Female 55+ QLD*

"Shopping online from foreign retailers , because my credit card has been compromised before." *Female 25-39 QLD*

"Shopping online from foreign retails because you don't know if it is legit or not." *Male 25-39 VIC*

"I believe that overseas website might not be genuine and in fact I would use them only use Coles and a few others." *Female 55+ NSW*

"…I don't feel safe because of security risks with online shopping." *Male 55+ VIC*

"Shopping online because so many scammers around." *Female 55+ SA/NT*

"Any sort of shopping or banking. It's too easy to steal people identities and money from accounts." *Female 40-54 VIC*

"…Shopping online retailers - not as good cyber protection - stealing credit card details.." *Female 40-54 QLD*

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.

However, little is known about the security sentiment of everyday Australians

- ASIAL has not done much work understanding the security sentiments in Australia.
- As a result, there are potentially gaps in both personal, work life and national security, as well as offline and online security concerns that may not be addressed by the current infrastructure or policies.

Next steps

- ASIAL sees an opportunity to further drive thought leadership and optimize the body's objectives by understanding Australian's **confidence** level of safety/security in their day-to-day lives.
- Further, by understanding this, ASIAL can help members talk to clients/potential clients, can put security on the political agenda and create better collective knowledge in the sector, and in doing so, lead the way in supporting greater collaboration to meet the needs of everyday Australians.

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Research objectives and topics

Key research objectives

1. Take a pulse of the Australian population with regards to personal and workplace safety/security
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
5. Generate a benchmark or "ASIAL Security Index" – which would allow for a more continuous understanding of impact of policy change, improvement in standards etc. to be measured against longitudinally

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 (Confidence Safety Index)
- Understand the 'why' behind situations in which Australians feel most unsafe

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NielsenIQ Omnibus Research Design

ASIAL Wave #1 2021

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 5th to Tuesday 16th February

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

ASIAL omnibus situations/activities

| **During daylight and night-time hours** QA1A/B	**Personal cyber and only security** QA2	**Work-based** QA3
In your own home	Using online banking	Using online banking for business purposes using company IT
Walking in your local streets	Shopping online from Australian retailers	Shopping online from Australian retailers using company IT
Being at local parks or sportsgrounds	Shopping online from foreign retailers	Shopping online from foreign retailers using company IT
Being at your local shopping centre	Shopping online from global retailers e.g. Amazon	Shopping online from global retailers e.g. Amazon using company IT
Being in your town centre or CBD (Central Business District)	Using social media sites e.g. Facebook or Instagram	Using social media sites e.g. Facebook or Instagram using company IT
Using public transport e.g. trains, buses or ferries	Using email for private conversations	Using work email for private conversations
Using licenced taxis	Using a personal computer or laptop to browse the internet	Using a work computer or laptop to browse the internet
Going to restaurants and bars		Being at your work premises during the day
Going to cinemas/ theatres		Being at your work premises at night
Being around your local educational institutions e.g. schools/ TAFE/ universities		Travelling to and from your work premises
Going to your local doctors/ medical centres		
Going to your local hospital		
Using your nearest airport		

Sample demographics

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

Quotas

Gender

49% **Male**

51% **Females**

Age

Age	%
18 to 24	12%
25 to 39	28%
40 to 54	24%
55+	35%
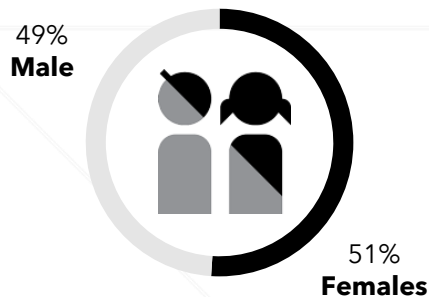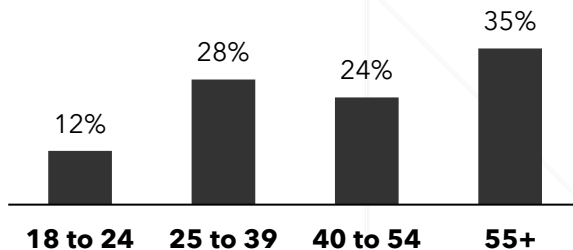
Location

NSW/ACT	34%
VIC	26%
QLD	20%
SA/NT	8%
WA	11%
TAS	2%

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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.