Ipsos Public Affairs

Centre for International Governance Innovation

CIGI-IPSOS GLOBAL SURVEY

INTERNET SECURITY & TRUST

2019 PART I & II:

PRIVACY, SECURITY, ACCESS & TRUST

UNITED NATIONS UNCTAD

Internet Society

GAME CHANGERS Ipsos

CONTENTS

METHODOLOGY & TAKE-AWAYS

METHODOLOGY

- This survey was conducted by Ipsos on behalf of the Centre for International Governance Innovation ("CIGI") between December 21st, 2018 & February 10th, 2019.
  - All online economies were fielded between December 21st, 2018 & January 4th, 2019.
  - Below are the field dates, for the offline economies:
    - Pakistan: Jan 14th – Feb 10th
    - Tunisia: Jan 24th – 31st
    - Kenya: Jan 28th – Feb 7th
    - Nigeria: Jan 25th – Feb 7th
- The survey was conducted in 25 economies—Australia, Brazil, Canada, China, Egypt, France, Germany, Great Britain, Hong Kong (China), India, Indonesia, Italy, Japan, Kenya, Mexico, Nigeria, Pakistan, Poland, Russia, South Africa, Republic of Korea, Sweden, Tunisia, Turkey and the United States—and involved 25,229 Internet users. Twenty-one of the economies utilized the Ipsos Internet panel system while four (Kenya, Nigeria, Pakistan & Tunisia) utilized face-to-face interviewing, given online constraints in these economies and the length of the poll.
- The average LOI of the online survey was ~10 minutes. The average LOI for the face-to-face interviews was around 20 minutes, or more.
- In the US and Canada respondents were aged 18-64, and 16-64 in all other economies.
- Since 2018, the economies of Russia and South Africa have been included in the BRICS definition, which previously only included Brazil, India, and China (BIC). For analytical purposes, the BRICS data is tracked against the BIC data from previous surveys, though the comparison is not direct.
- Approximately 1,000+ individuals were surveyed in each economy and are weighted to match the population in each economy surveyed. The precision of Ipsos online polls is calculated using a credibility interval. In this case, a poll of 1,000 is accurate to +/- 3.5 percentage points. For the face-to-face interviews, the margin of error is +/-3.1, 19 times out of 20.

BRICS = **Brazil, Russia, India, China, South Africa**
APAC = **Asia Pacific**
LATAM = **Latin America**

ECONOMY ABBREVIATIONS

Total	**TL**
Australia	**AU**
Brazil	**BR**
Canada	**CA**
China	**CN**
Egypt	**EG**
France	**FR**
Germany	**DE**
Great Britain	**GB**
Hong Kong (China)	**HK**
India	**IN**
Indonesia	**ID**
Italy	**IT**

Japan	**JP**
Kenya	**KE**
Mexico	**MX**
Nigeria	**NG**
Pakistan	**PK**
Poland	**PL**
Republic of Korea	**KR**
Russia	**RU**
South Africa	**ZA**
Sweden	**SE**
Tunisia	**TN**
Turkey	**TR**
United States	**US**

FIVE KEY TAKE-AWAYS

1 Eight in ten global citizens concerned about their online privacy as majority says they're more concerned than last year. Concern is highest in developing economies. (slides 8-13)

2 One in five say it's getting harder to surf the internet with the confidence that content is not being censored. On balance, people in many economies say it's getting worse, not better, including Russia, USA, Sweden and Great Britain. (slides 85 to 88)

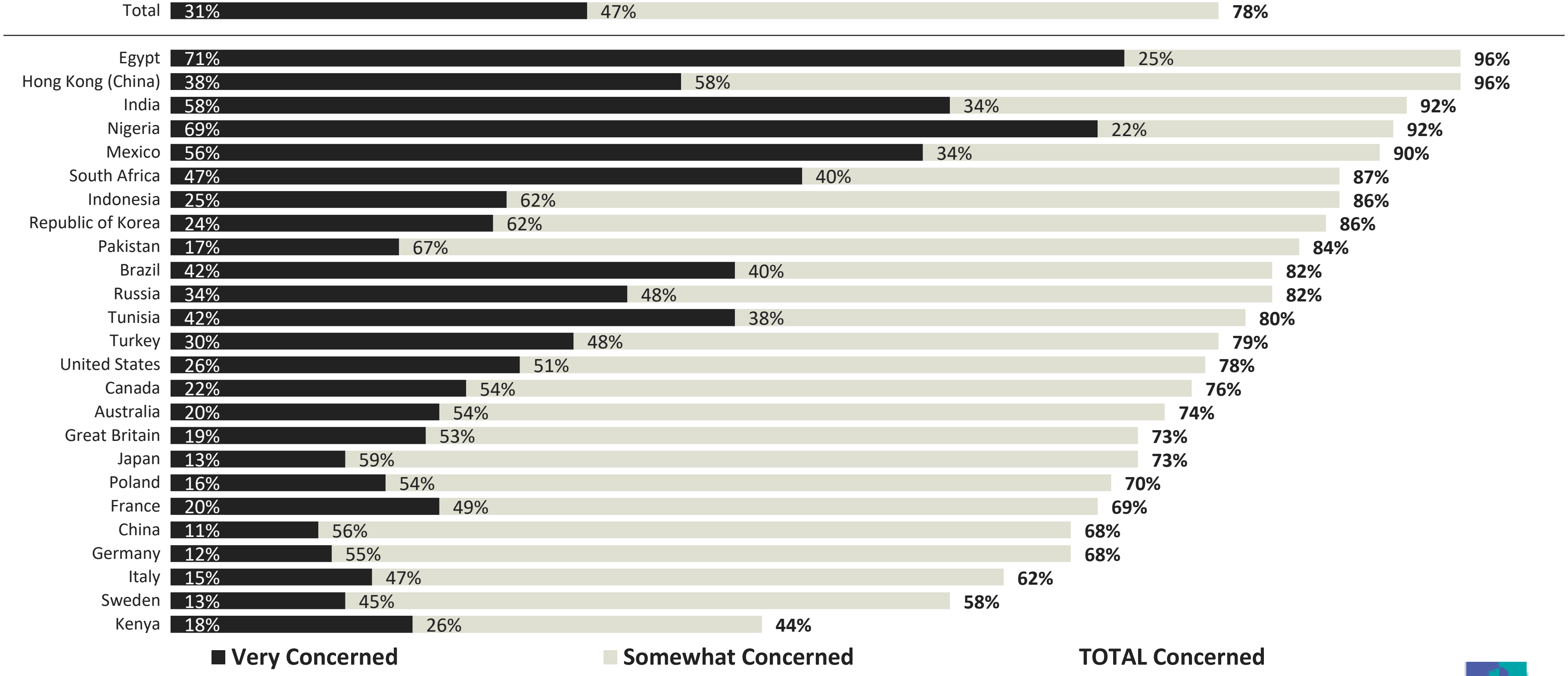
3 Driving increased concern in online privacy, more are pointing the finger at governments, both foreign and domestic, as a culprit. (slides 25-32)

4 One in four global citizens don't trust in the internet. Distrust increasingly fueled by social media, governments and search engines. (112 to 132)

5 Distrust in internet causing global citizens to disclose less information online (49%, +6 points), use the internet more selectively (39%, +4 points), and make fewer online purchase (18%, +3 points) among other precautions. (slide 136)

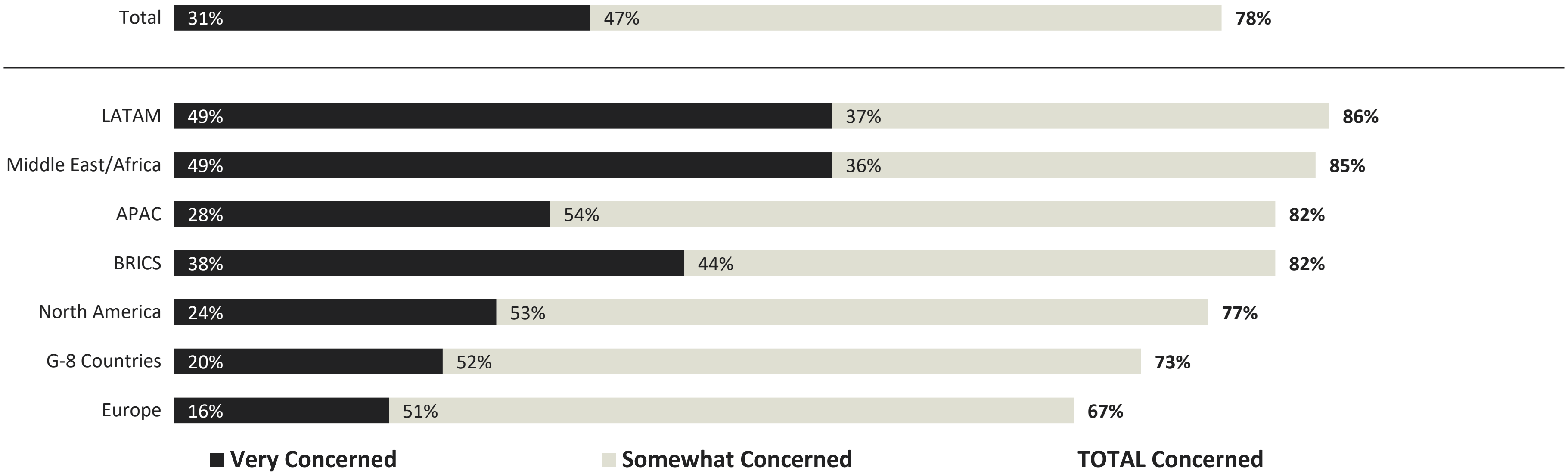
PRIVACY & SECURITY

Three in four (78%) global citizens are at least *somewhat concerned* about their online privacy. Concern is highest in Egypt & Hong Kong (China), where virtually all citizens (96% in both economies) are concerned about their online privacy, including seven in ten (71%) Egyptians who are *very concerned* about this. Kenya is the only economy in which less than half (44%) are concerned about their online privacy.



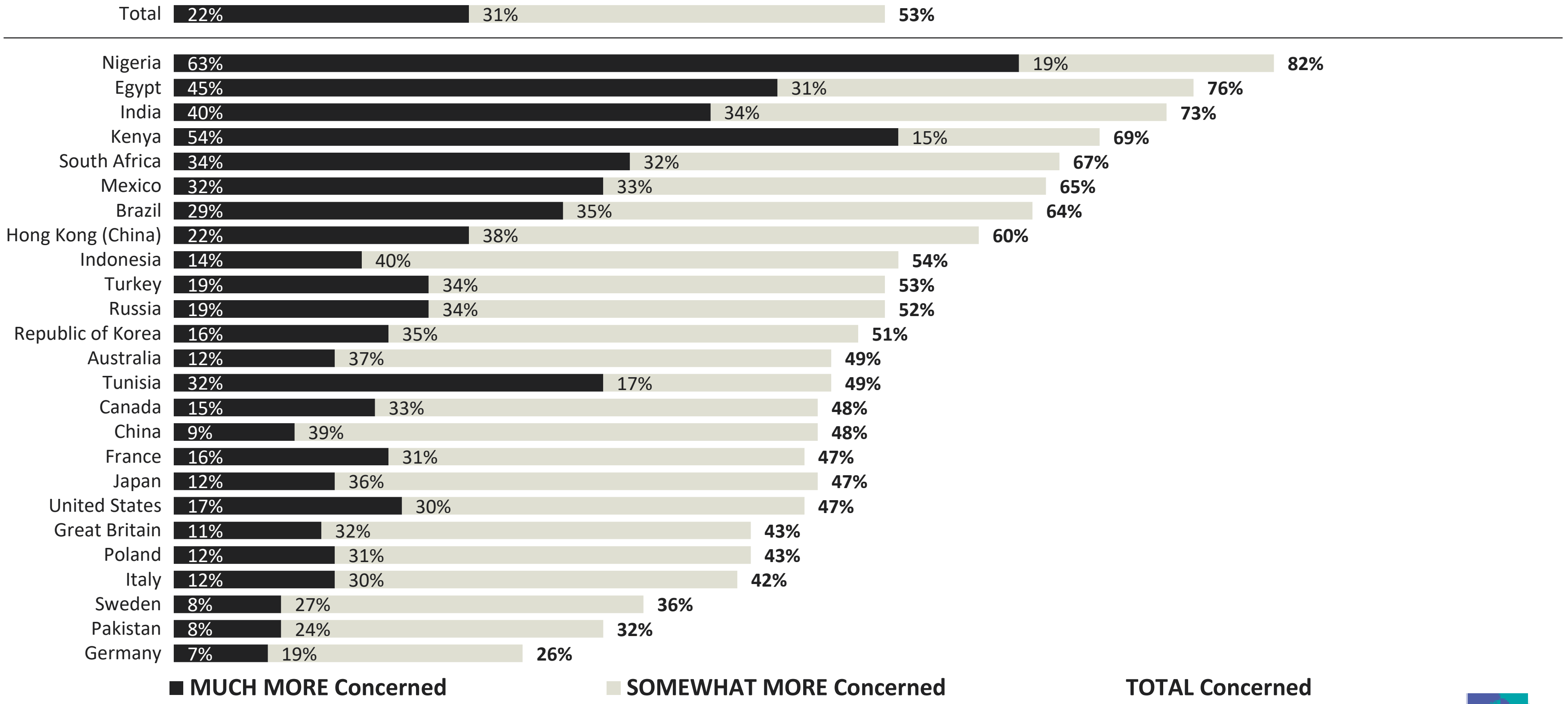
A1. How concerned are you about your online privacy?
Base: 2019 (n=23,854)

Across all regions, most have at least some degree of concern when it comes to their online privacy, with those living in developing economies being significantly more likely to express at least some level of concern. Europeans are least concerned.



A1. How concerned are you about your online privacy?
Base: 2019 (n=23,854)

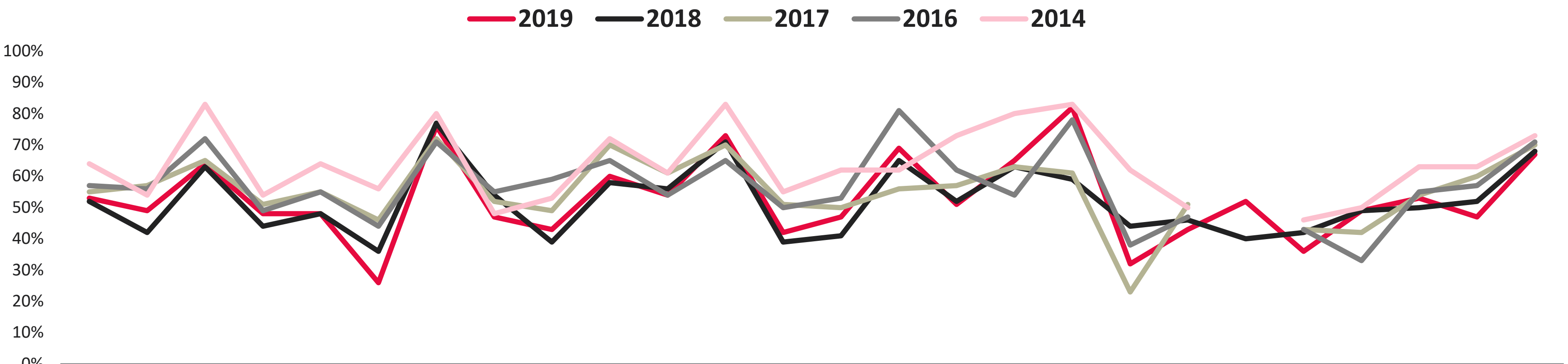
Overall, a majority (53%) are more concerned about their online privacy, compared to a year ago (up 1 point). Nigerians (at 82%) are by far the most concerned about their online privacy, compared to a year ago, and are about three times more likely to express concern, compared to Germans (26%), who are least likely to have growing concern.



Q1. How concerned are you about your online privacy compared to one year ago? (Select one)
Base: All Respondents Total 2014 (n=23,376); Total 2016 (n=24,143); Total 2017 (n=24,750); 2018 (n=24,750); 2019 (n=25,229)

Just over half (53%) of global citizens are more concerned about their online privacy, up just one point from last year, but the first time the rate of growing concern has increased since the study began, even if just marginally.

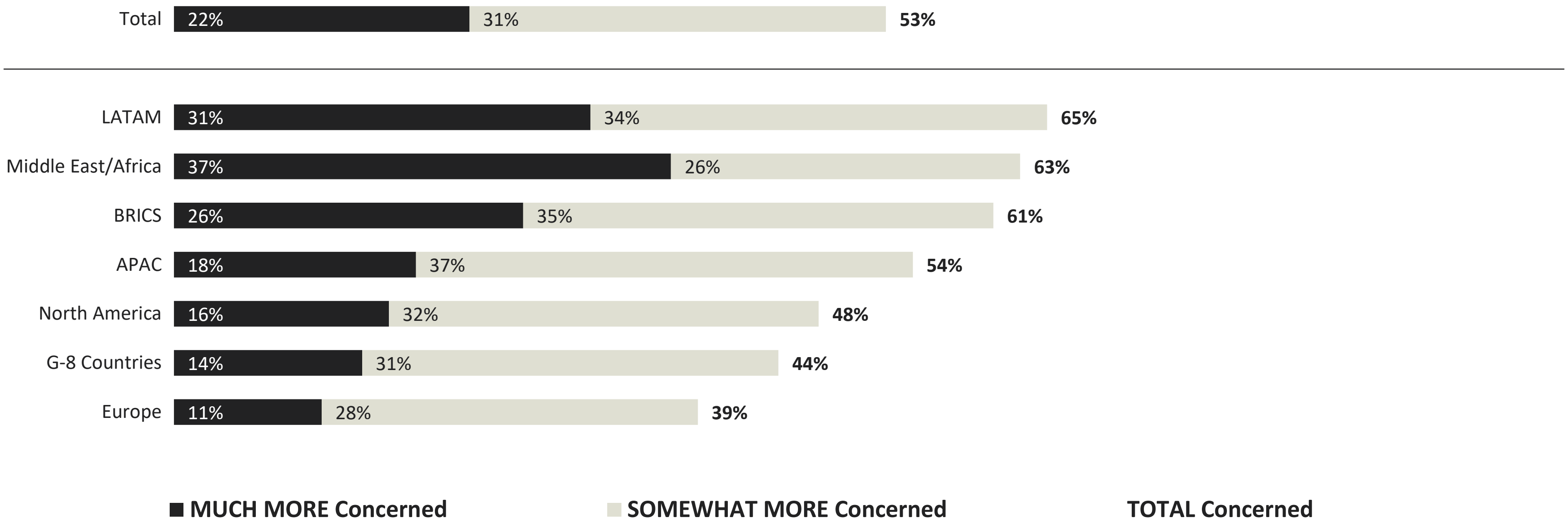
Tracking – [NET] CONCERNED



	TL	AU	BR	CA	CN	DE	EG	FR	GB	HK	ID	IN	IT	JP	KE	KR	MX	NG	PK	PL	RU	SE	TN	TR	US	ZA
2019	53%	49%	64%	48%	48%	26%	76%	47%	43%	60%	54%	73%	42%	47%	69%	51%	65%	82%	32%	43%	52%	36%	49%	53%	47%	67%
2018	52%	42%	63%	44%	48%	36%	77%	54%	39%	58%	56%	71%	39%	41%	65%	52%	63%	59%	44%	46%	40%	42%	49%	50%	52%	68%
2017	55%	57%	65%	51%	55%	46%	72%	52%	49%	70%	61%	70%	51%	50%	56%	57%	63%	61%	23%	51%	n/a	43%	42%	54%	60%	70%
2016	57%	56%	72%	49%	55%	44%	71%	55%	59%	65%	54%	65%	50%	53%	81%	62%	54%	78%	38%	47%	n/a	43%	33%	55%	57%	71%
2014	64%	54%	83%	54%	64%	56%	80%	48%	53%	72%	61%	83%	55%	62%	62%	73%	80%	83%	62%	50%	n/a	46%	50%	63%	63%	73%

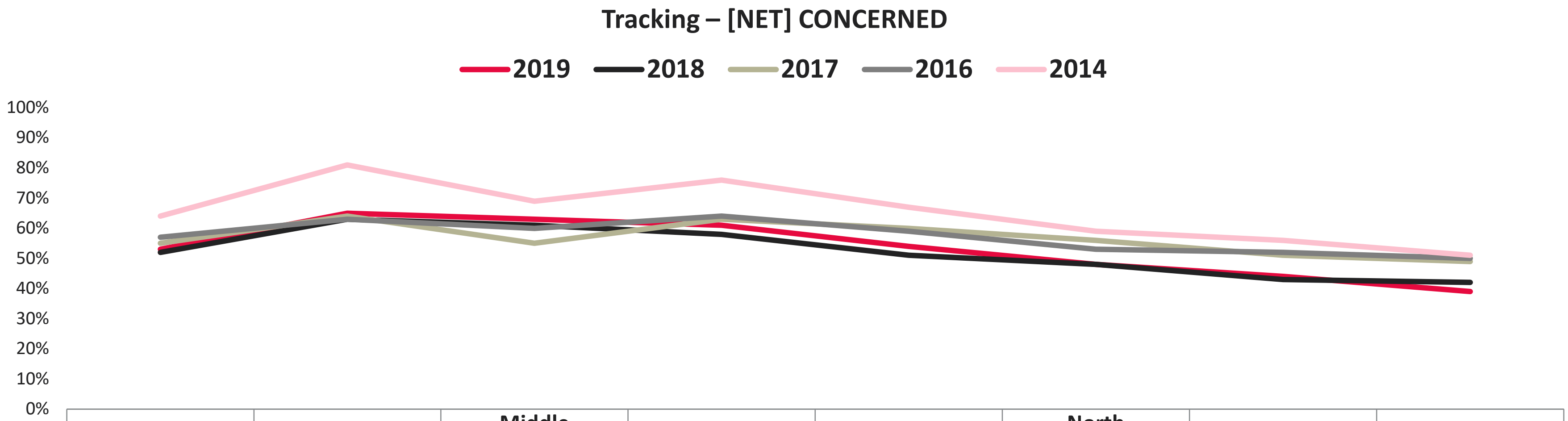
Q1. How concerned are you about your online privacy compared to one year ago? (Select one)
Base: All Respondents Total 2014 (n=23,376); Total 2016 (n=24,143); Total 2017 (n=24,750); 2018 (n=24,750); 2019 (n=25,229)

Growing concerns towards online privacy are less pronounced in developed economies. More specifically, less than half in Europe (39%), North America (48%) & the G-8 more generally (44%) say they're more concerned than last year, but a majority in LATAM (65%), The Middle East (63%), BRICS (61%) and APAC (54%) cite a growing concern.



Q1. How concerned are you about your online privacy compared to one year ago? (Select one)
Base: All Respondents Total 2014 (n=23,376); Total 2016 (n=24,143); Total 2017 (n=24,750); 2018 (n=24,750); 2019 (n=25,229)

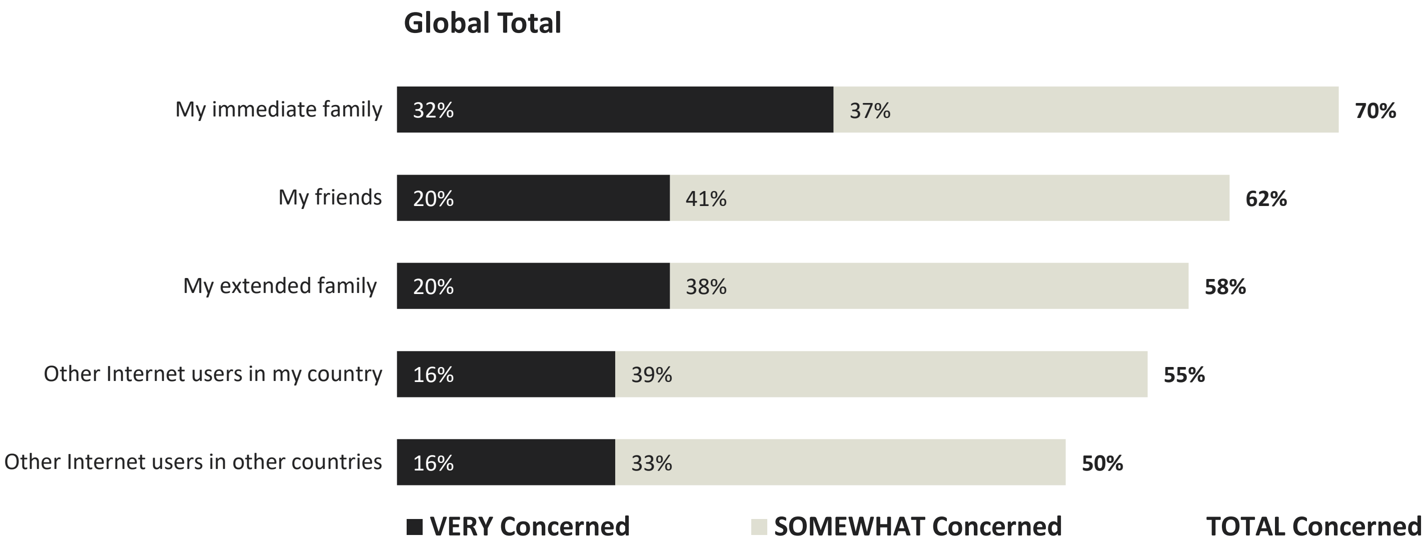
Concern with respect to online privacy is largely unchanged across most regions of the world, compared to the 2018 survey, and continues to be higher in the developing economies.



	Total	LATAM	Middle East/Africa	BRICS	APAC	North America	G-8 Countries	Europe
2019	53%	65%	63%	61%	54%	48%	44%	39%
2018	52%	63%	61%	58%	51%	48%	43%	42%
2017	55%	64%	55%	63%	60%	56%	51%	49%
2016	57%	63%	60%	64%	59%	53%	52%	50%
2014	64%	81%	69%	76%	67%	59%	56%	51%

Q1. How concerned are you about your online privacy compared to one year ago? (Select one)
Base: All Respondents Total 2014 (n=23,376); Total 2016 (n=24,143); Total 2017 (n=24,750); 2018 (n=24,750); 2019 (n=25,229)

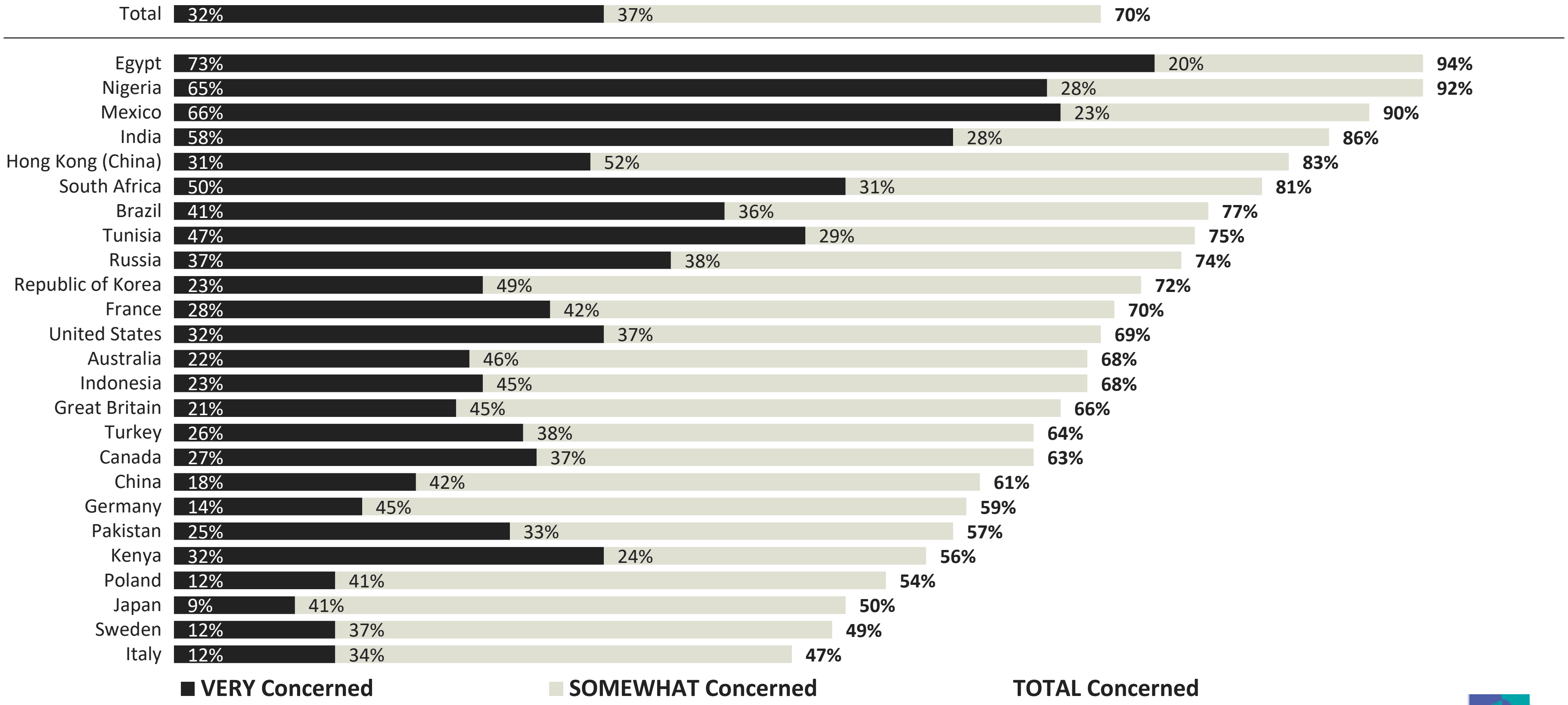
Overall, and perhaps not surprisingly, global citizens are most concerned about the online privacy of their immediate family (70% concerned) and friends (62%).



A2. How concerned are you about the online privacy of the following:
Base: 2019 (n=23,854)

CONCERN FOR ONLINE PRIVACY OF IMMEDIATE FAMILY

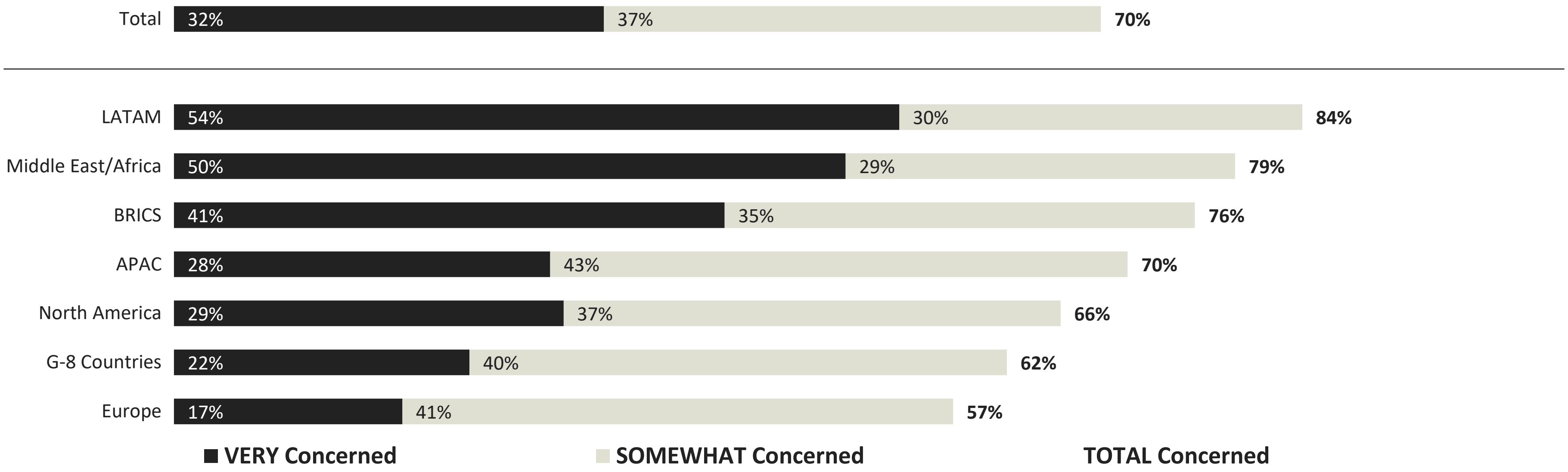
Seven in ten (70%) global citizens are concerned about the online privacy of their immediate family, the highest proportion out of all actors surveyed.



A2. How concerned are you about the online privacy of the following:
Base: 2019 (n=23,854)

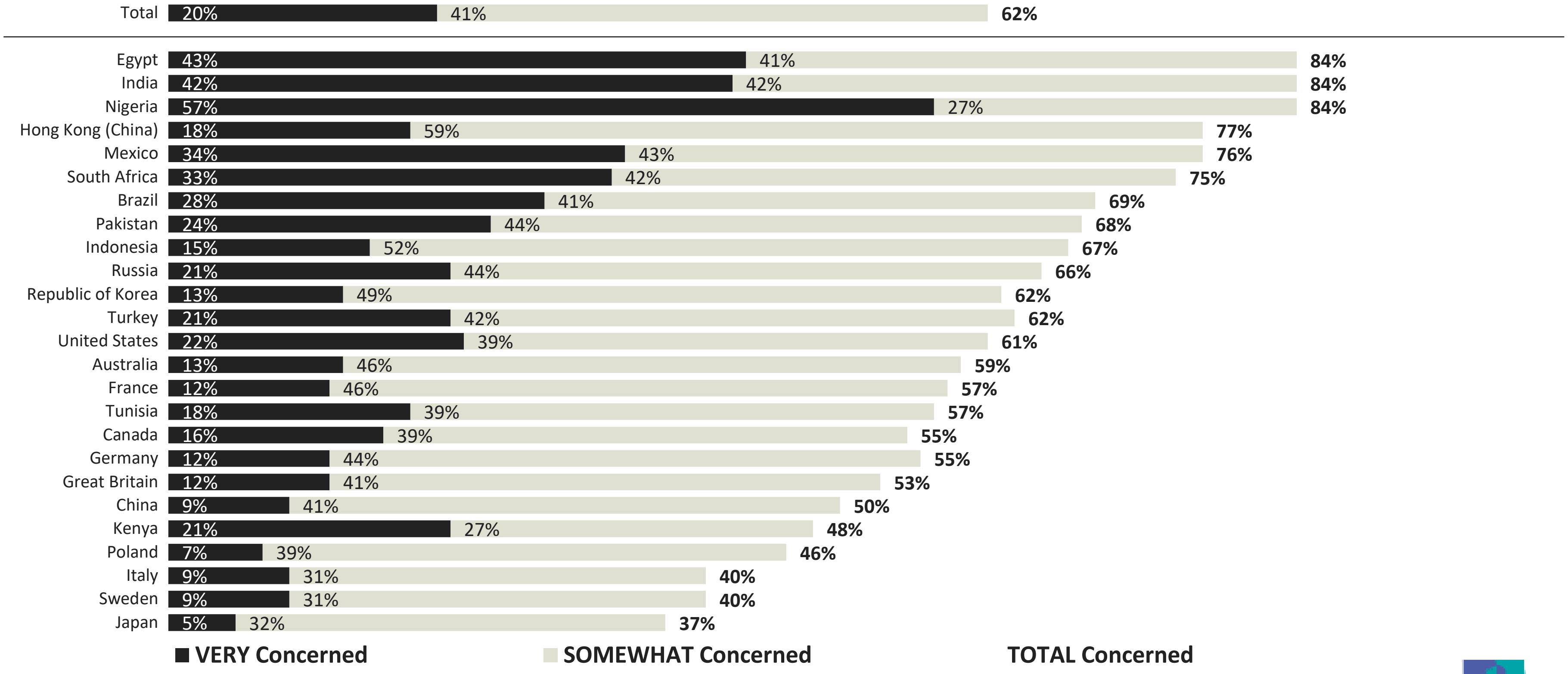
CONCERN FOR ONLINE PRIVACY OF IMMEDIATE FAMILY

Online privacy concerns related to one's immediate family are higher in developing economies, and comparatively lower in the developed world.



A2. How concerned are you about the online privacy of the following:
Base: 2019 (n=23,854)

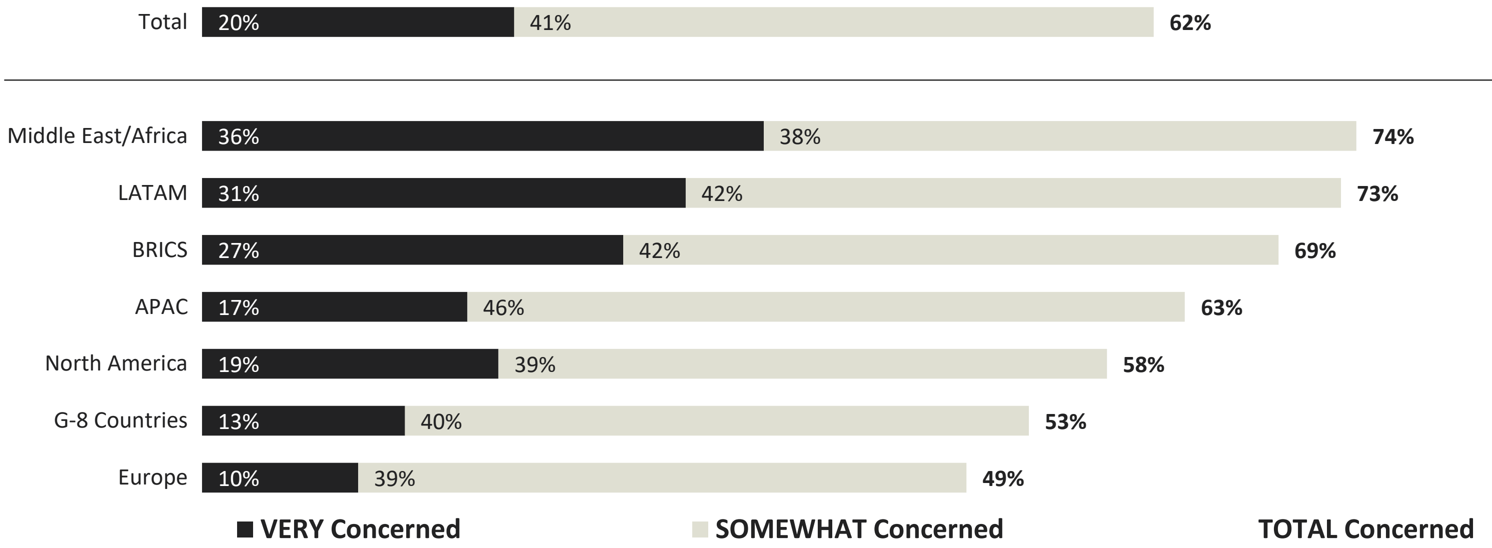
Egyptians, Nigerians & Indians (84%) are among the most concerned about the online privacy of their friends and are more than twice as likely to express concern, compared to citizens living in Japan (37%), Sweden (40%) & Italy (40%).



A2. How concerned are you about the online privacy of the following:
Base: 2019 (n=23,854)

CONCERN FOR ONLINE PRIVACY OF FRIENDS

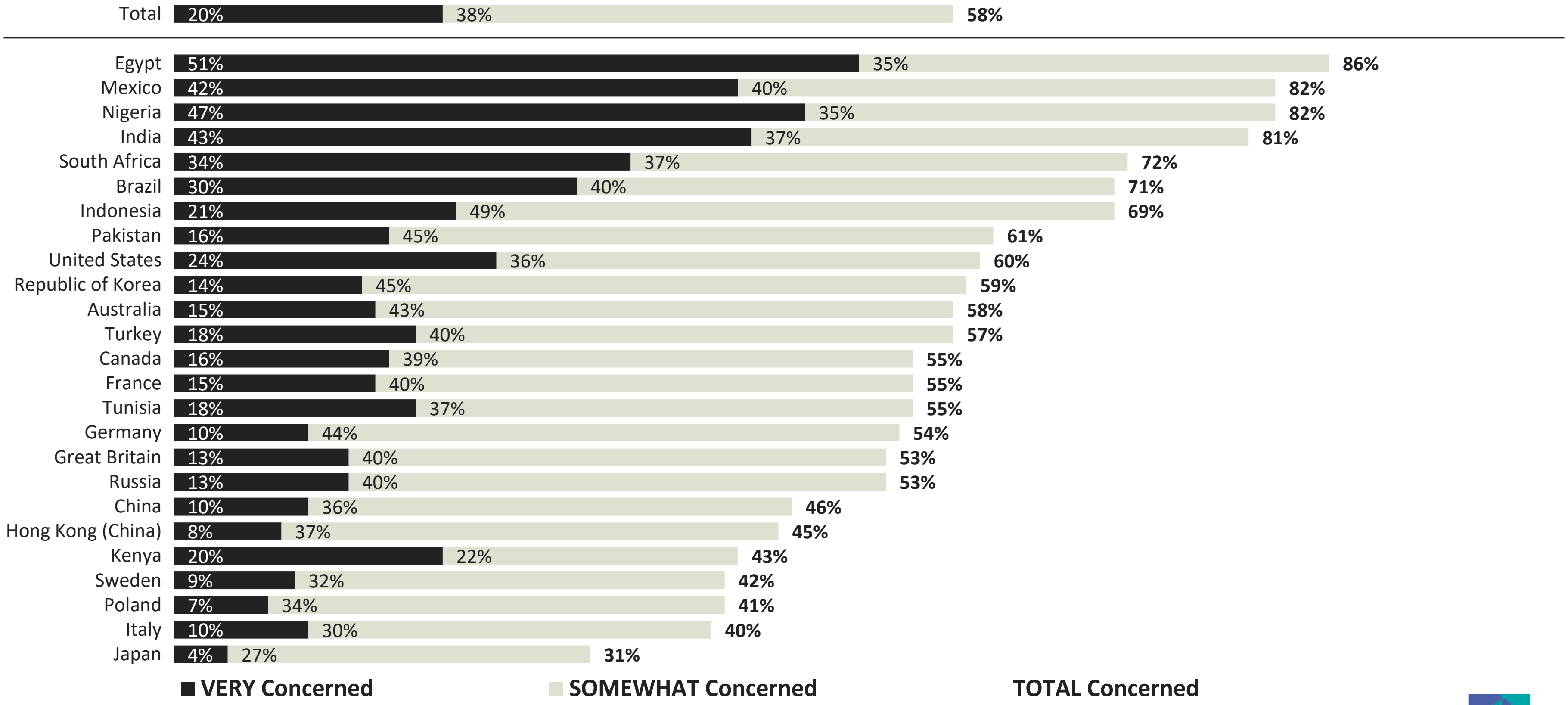
In all economies, save for Europe, majorities indicate that they are concerned about the online privacy of their friends.



A2. How concerned are you about the online privacy of the following:
Base: 2019 (n=23,854)

CONCERN FOR ONLINE PRIVACY OF EXTENDED FAMILY

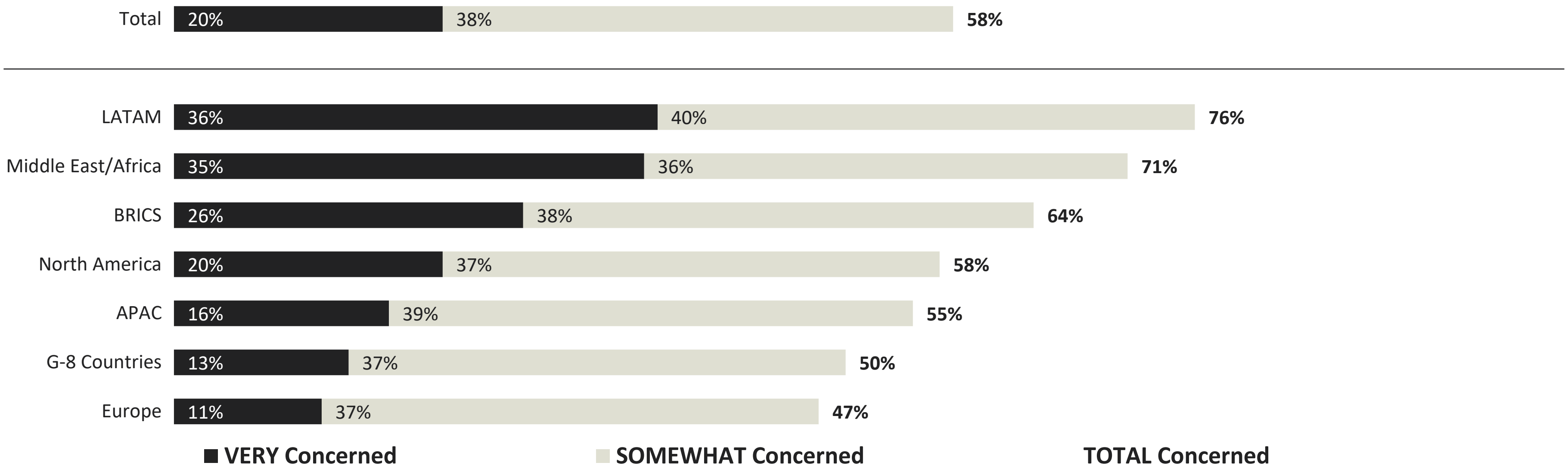
Overall, three in five (58%) are concerned about the online privacy of their extended family. At the high end, Egyptians (86%) are most concerned and at the low end, the Japanese (31%) are least concerned.



A2. How concerned are you about the online privacy of the following:
Base: 2019 (n=23,854)

CONCERN FOR ONLINE PRIVACY OF EXTENDED FAMILY

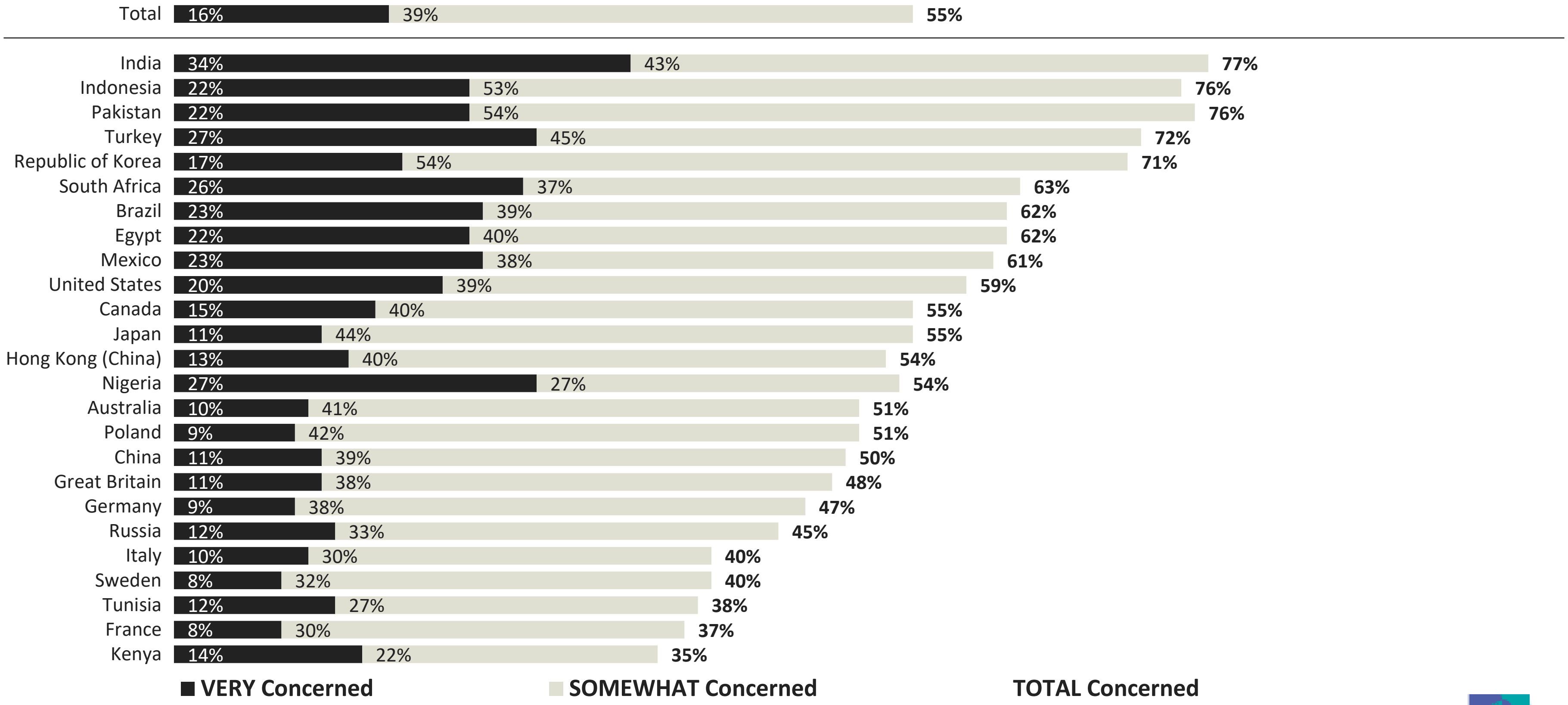
Consistent with other metrics, concerns about the online privacy of one's extended family are highest in the LATAM, Middle East & Africa regions and lowest in Europe.



A2. How concerned are you about the online privacy of the following:
Base: 2019 (n=23,854)

CONCERN FOR ONLINE PRIVACY OF OTHER INTERNET USERS IN ECONOMY

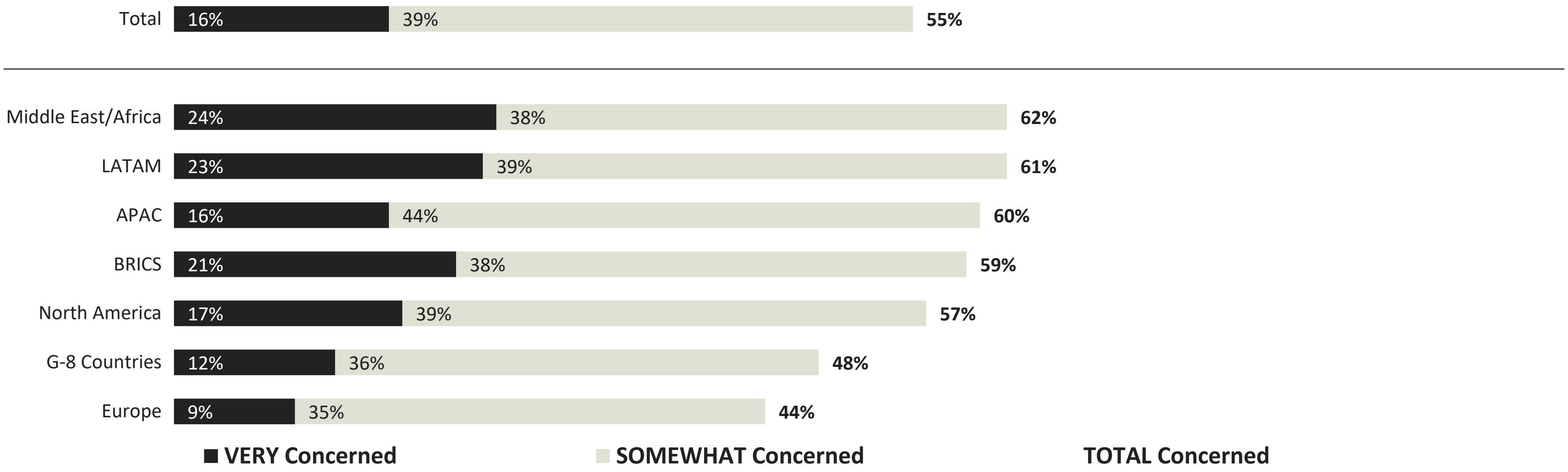
A majority (55%) of global citizens indicate concern for the online privacy of other Internet users in their economy, ranging from three quarters in Pakistan (76%), Indonesia (76%) & India (77%) to one in three (35%) in Kenya.



A2. How concerned are you about the online privacy of the following:
Base: 2019 (n=23,854)

CONCERN FOR ONLINE PRIVACY OF OTHER INTERNET USERS IN ECONOMY

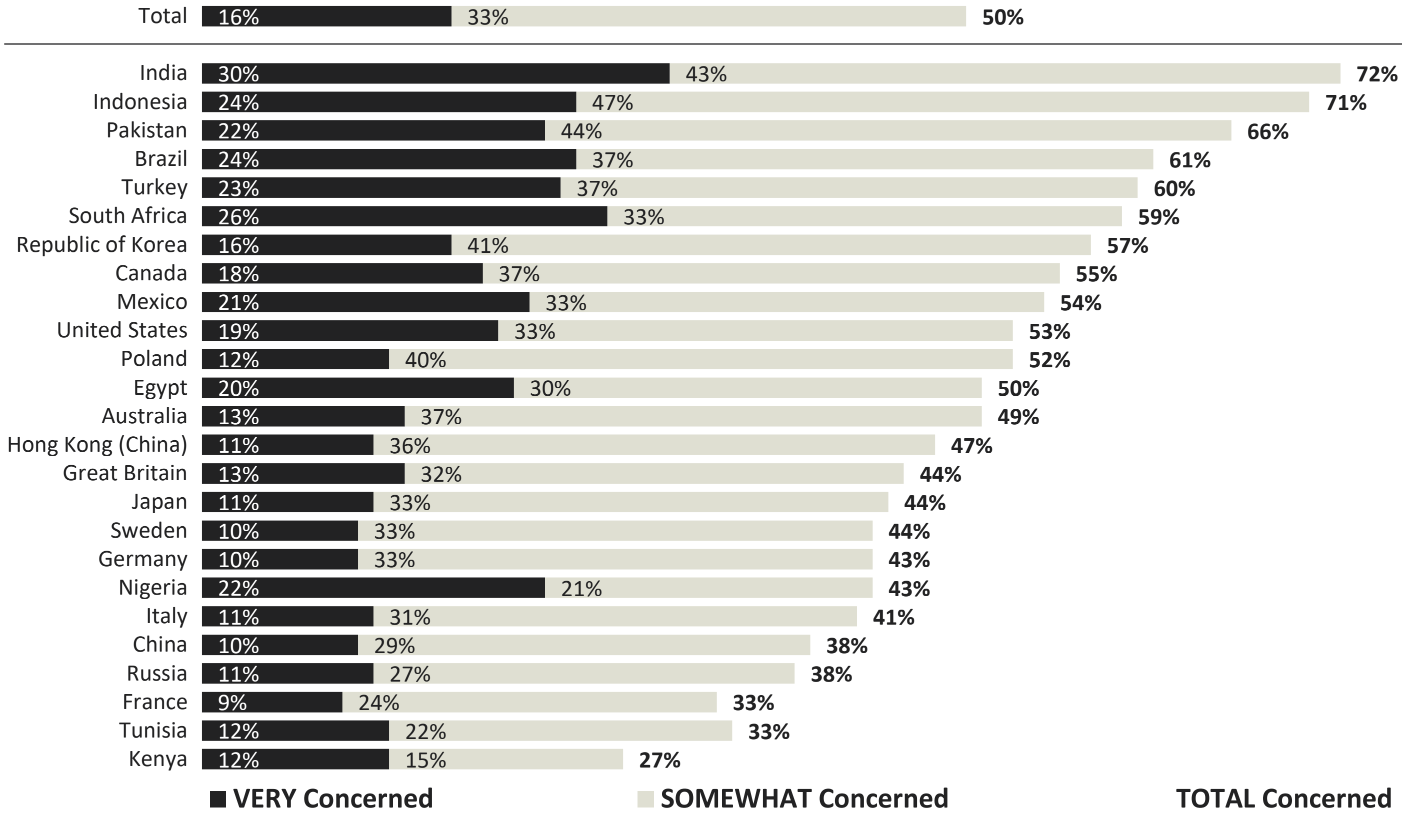
Well under half (44%) of Europeans are concerned about the online privacy of other Internet users in their economy, the lowest proportion out of any of the economies surveyed.



A2. How concerned are you about the online privacy of the following:
Base: 2019 (n=23,854)

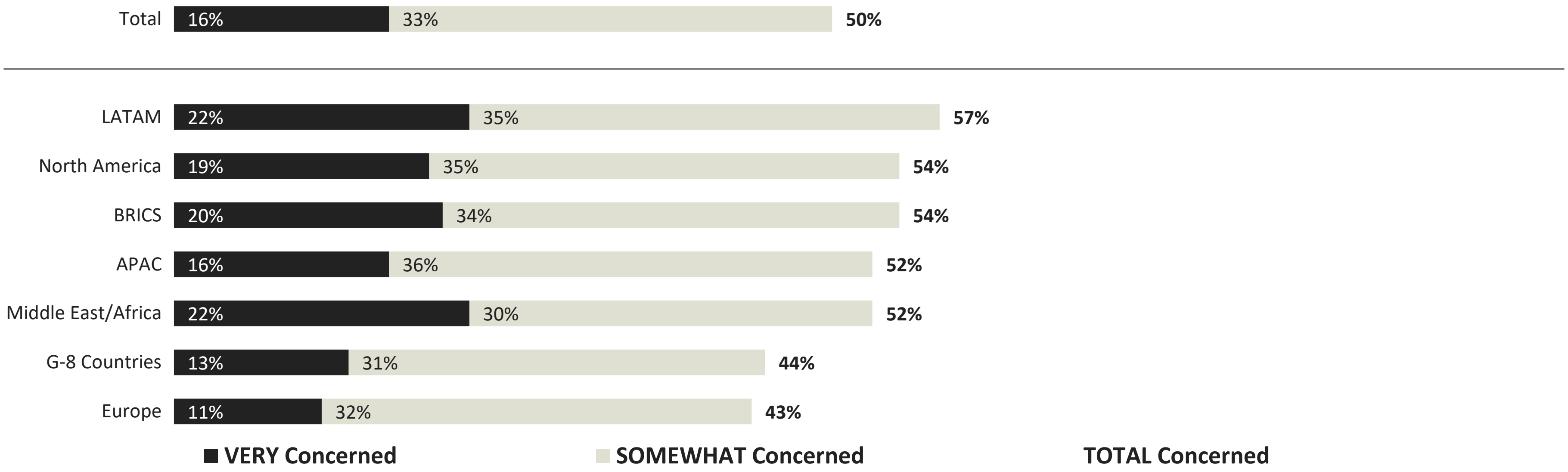
CONCERN FOR ONLINE PRIVACY OF OTHER INTERNET USERS ABROAD

Half (50%) of global citizens are concerned about the online privacy of others living abroad. Concern is exceptionally low in Kenya (27%), and is highest in India (72%) & Indonesia (71%) who express the most concerned about others.



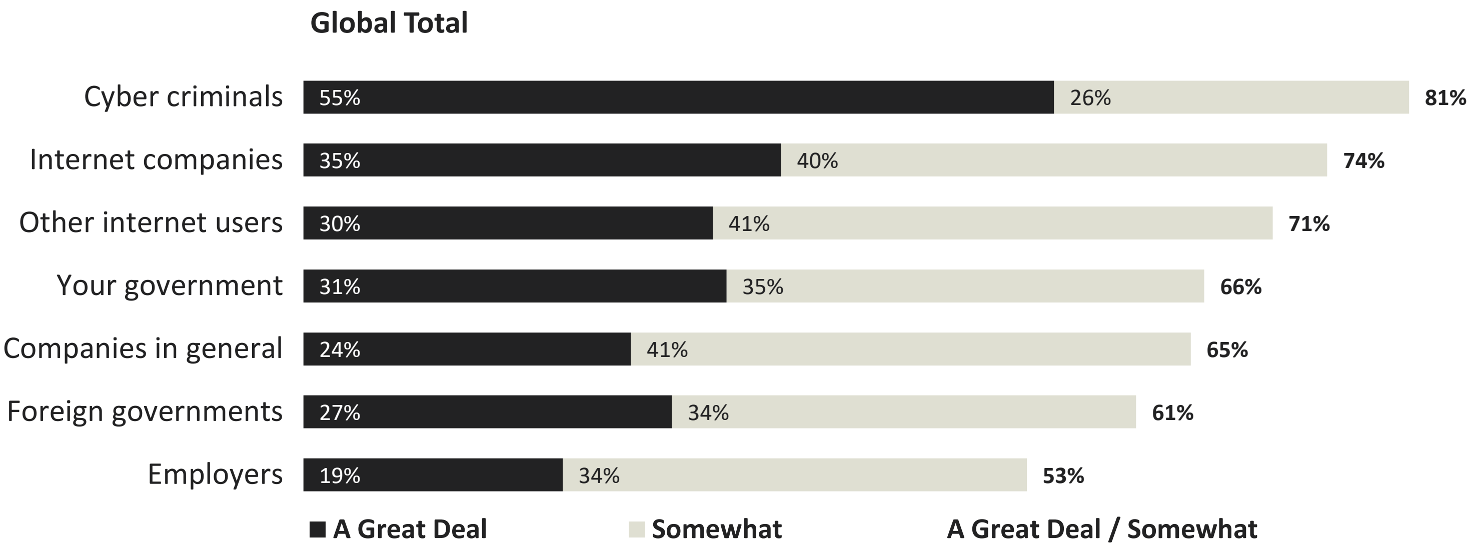
A2. How concerned are you about the online privacy of the following:
Base: 2019 (n=23,854)

Once again, those living in the LATAM, Middle East & Africa regions are among the most concerned when it comes to the online privacy of others living abroad. Less than half of Europeans (43%) and those living in G-8 Countries more generally (44%) feel concerned about this.



A2. How concerned are you about the online privacy of the following:
Base: 2019 (n=23,854)

Among those who claim to be at least *somewhat more concerned* about their online privacy, compared to a year ago, cyber criminals are the leading factor that has contributed to their increased levels of concern. However, since 2016, concern governments, both domestic and foreign, have grown the most.



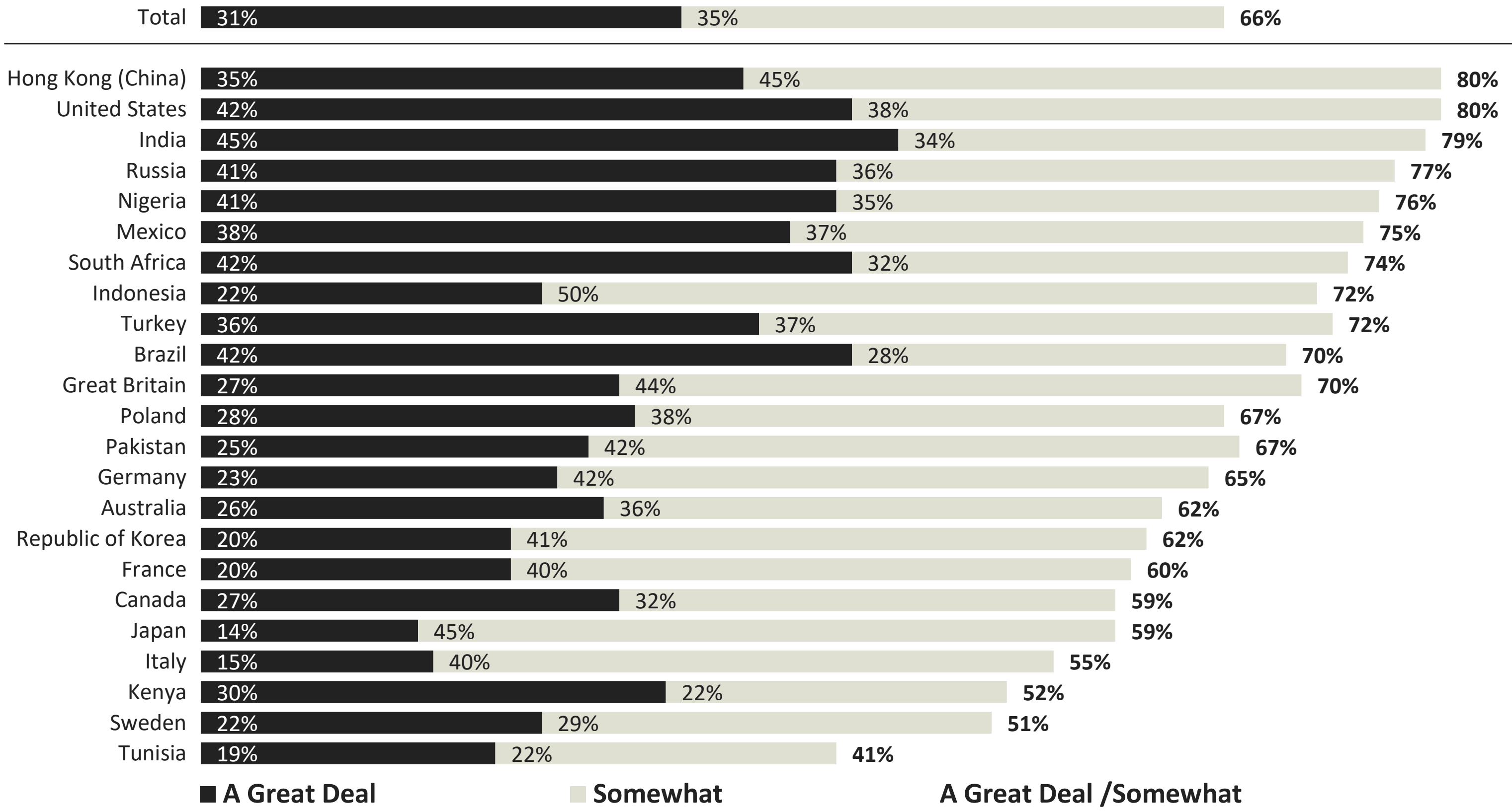
[NET] Contribution

2018	2017	2016
81%	82%	79%
74%	74%	72%
66%	67%	66%
63%	65%	60%
65%	61%	62%
58%	61%	50%
48%	49%	48%

Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy?
Base: A Great Deal / Somewhat More Concerned About Online Privacy 2016 (n=13,867); 2017 (n=12,468); 2018 (n=12,956); 2019 (n=25,229)

OWN GOVERNMENT

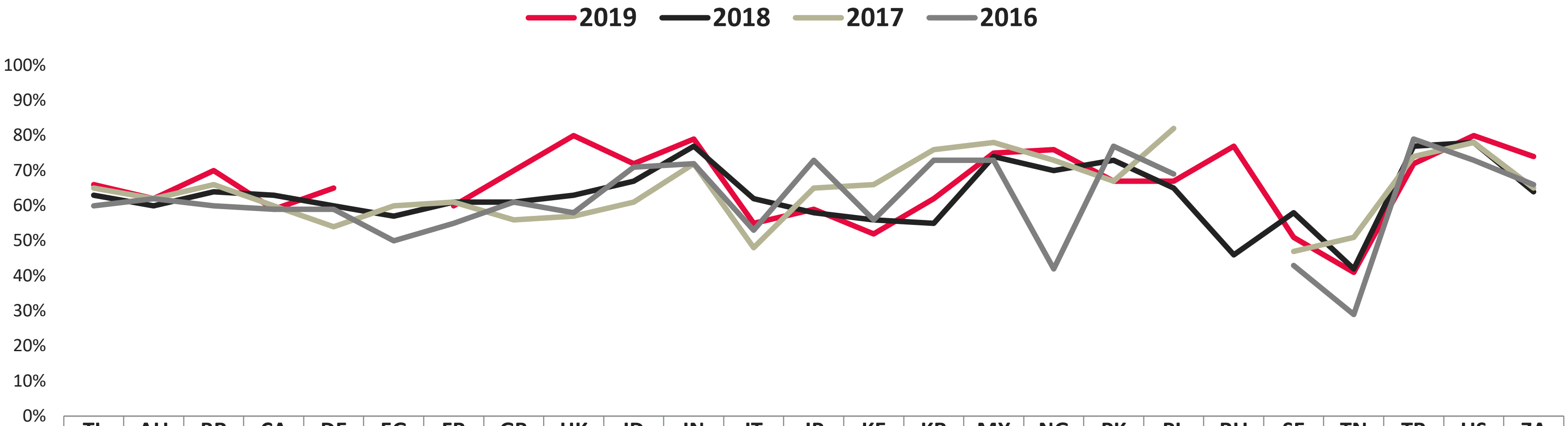
Majorities in all economies, save for Tunisia (41%), think that their own government contributes, at least somewhat, to heightening online privacy concerns.



Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy? [Your Government]
Base: A Great Deal / Somewhat More Concerned About Online Privacy 2016 (n=13,867); 2017 (n=12,468); 2018 (n=12,468); 2019 (n=12,899) NOT ASKED IN EGYPT & CHINA

Compared to 2018, global citizens are more likely (+3 pts) to claim that their government has contributed, at least *somewhat*, to increased levels of concern about online privacy, with Russians (+31) & Hong Kong (China) residents (+17) leading much of the increase. Concern about one's own government (66%) is highest this year than we've ever measured.

Tracking – [NET] A GREAT DEAL/SOMEWHAT

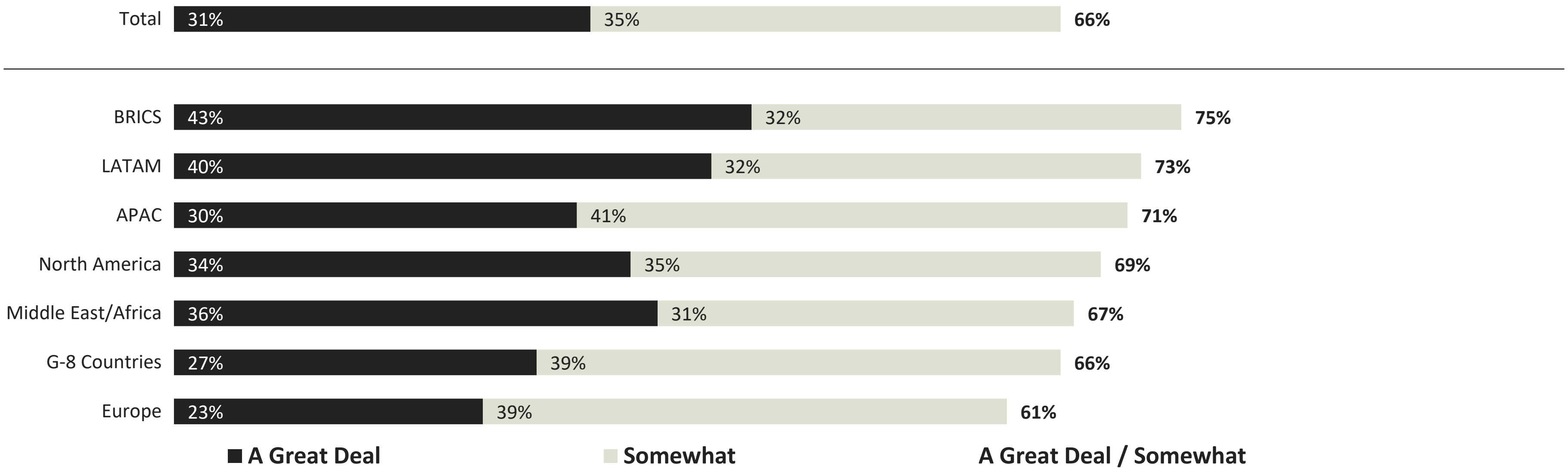


	TL	AU	BR	CA	DE	EG	FR	GB	HK	ID	IN	IT	JP	KE	KR	MX	NG	PK	PL	RU	SE	TN	TR	US	ZA
2019	66%	62%	70%	59%	65%	n/a	60%	70%	80%	72%	79%	55%	59%	52%	62%	75%	76%	67%	67%	77%	51%	41%	72%	80%	74%
2018	63%	60%	64%	63%	60%	57%	61%	61%	63%	67%	77%	62%	58%	56%	55%	74%	70%	73%	65%	46%	58%	42%	77%	78%	64%
2017	65%	62%	66%	60%	54%	60%	61%	56%	57%	61%	72%	48%	65%	66%	76%	78%	73%	67%	82%	n/a	47%	51%	74%	78%	65%
2016	60%	62%	60%	59%	59%	50%	55%	61%	58%	71%	72%	53%	73%	56%	73%	73%	42%	77%	69%	n/a	43%	29%	79%	73%	66%

Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy? [Your Government]
Base: A Great Deal / Somewhat More Concerned About Online Privacy 2016 (n=13,867); 2017 (n=12,468); 2018 (n=12,468); 2019 (n=12,899) NOT ASKED IN EGYPT & CHINA

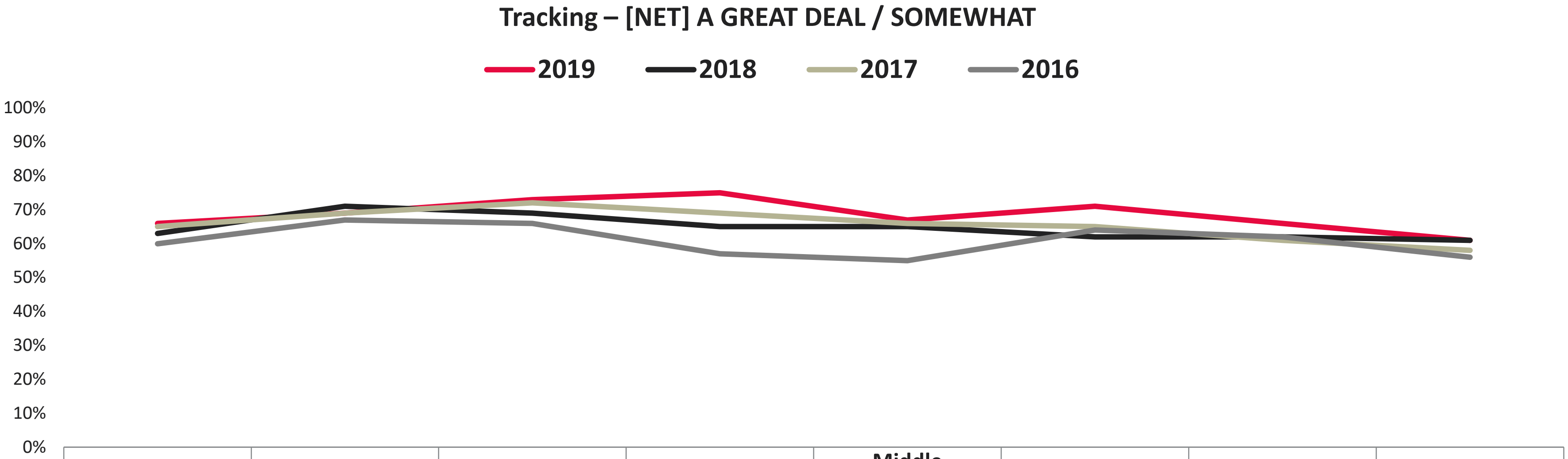
OWN GOVERNMENT

Across all regions, a majority of global citizens think that their government has contributed, at least *somewhat*, to their increased levels of concern, with respect to online privacy.



Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy? [Your Government]
Base: A Great Deal / Somewhat More Concerned About Online Privacy 2016 (n=13,867); 2017 (n=12,468); 2018 (n=12,468); 2019 (n=12,899) NOT ASKED IN EGYPT & CHINA

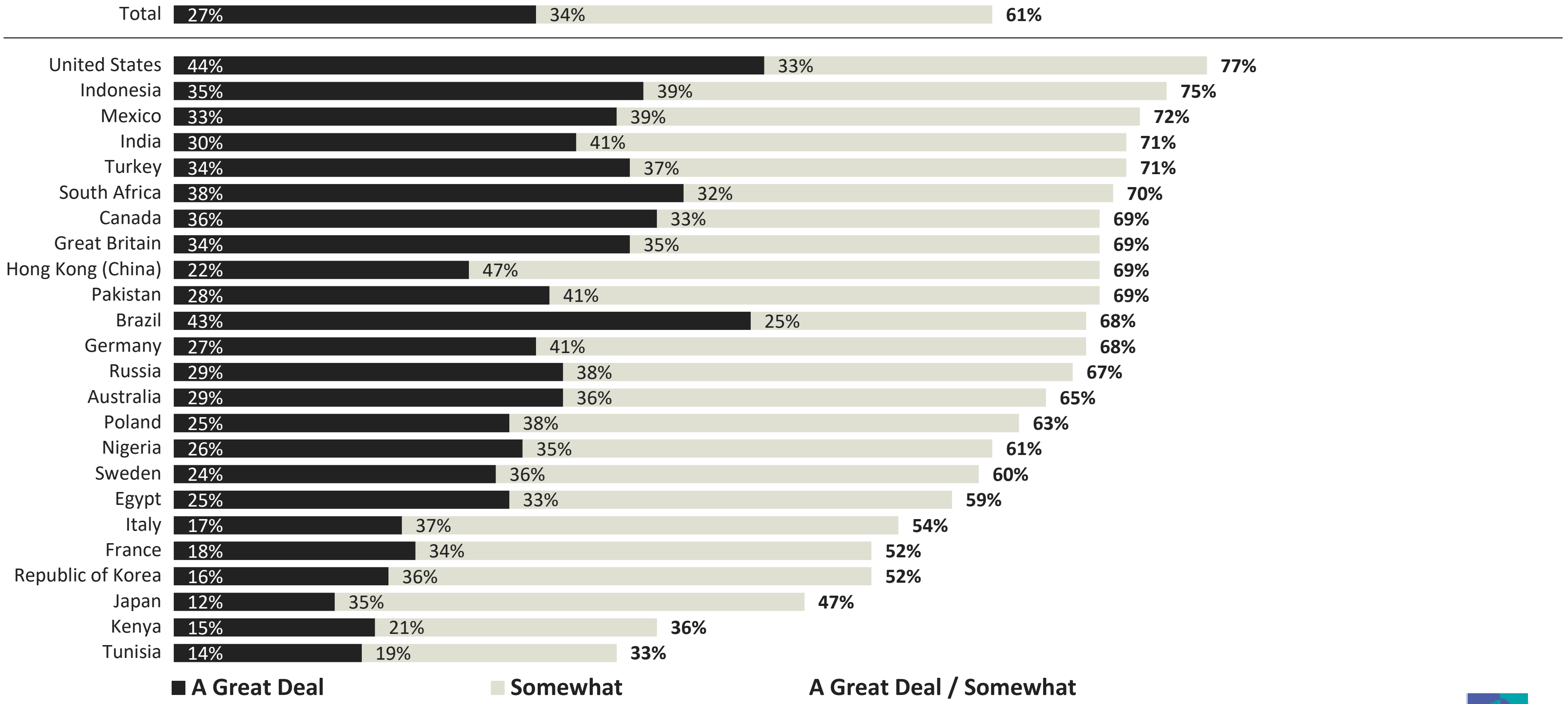
In each region, save for Europe & North America, global citizens are more likely to feel as though their government has contributed, at least *somewhat*, to their increased online privacy concerns, relative to the 2018 survey.



	Total	North America	LATAM	BRICS	Middle East/Africa	APAC	G-8 Countries	Europe
2019	66%	69%	73%	75%	67%	71%	66%	61%
2018	63%	71%	69%	65%	65%	62%	62%	61%
2017	65%	69%	72%	69%	66%	65%	61%	58%
2016	60%	67%	66%	57%	55%	64%	62%	56%

Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy? [Your Government]
Base: A Great Deal / Somewhat More Concerned About Online Privacy 2016 (n=13,867); 2017 (n=12,468); 2018 (n=12,468); 2019 (n=12,899) NOT ASKED IN EGYPT & CHINA

Overall, three in five (61%) of those who feel more concerned about their online privacy would attribute at least some of this concern to foreign governments.

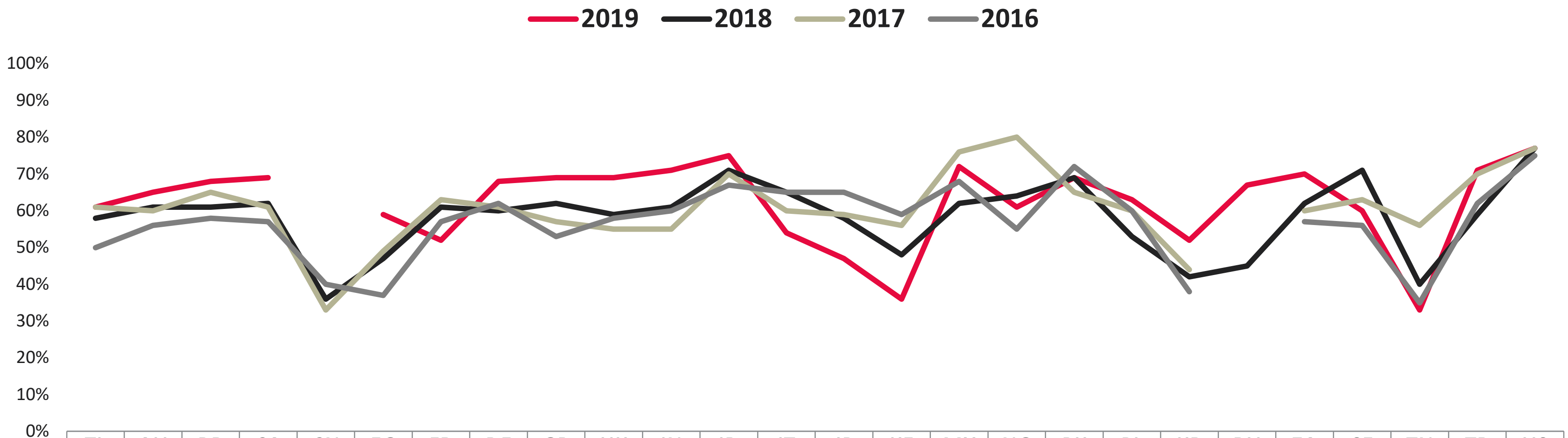


Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy? [Foreign Government]
Base: A Great Deal / Somewhat More Concerned About Online Privacy 2016 (n=13,867); 2017 (n=12,956); 2018 (n=12,956); 2019 (n=13,670) NOT ASKED IN CHINA

FOREIGN GOVERNMENTS

Global citizens are more likely, compared to a year ago, to indicate that foreign governments have contributed to increased levels of online privacy concerns (+3 pts), with much of the increase being driven by Russians (+22).

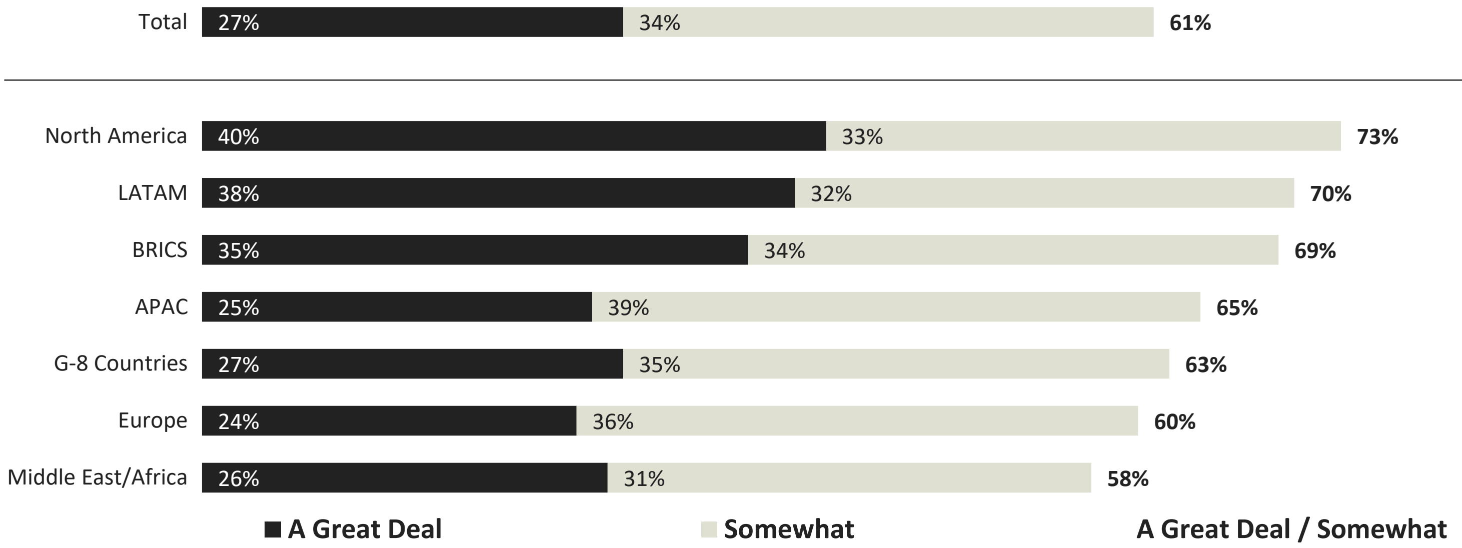
Tracking – [NET] A GREAT DEAL/SOMEWHAT



	TL	AU	BR	CA	CN	EG	FR	DE	GB	HK	IN	ID	IT	JP	KE	MX	NG	PK	PL	KR	RU	ZA	SE	TN	TR	US
2019	61%	65%	68%	69%	n/a	59%	52%	68%	69%	69%	71%	75%	54%	47%	36%	72%	61%	69%	63%	52%	67%	70%	60%	33%	71%	77%
2018	58%	61%	61%	62%	36%	47%	61%	60%	62%	59%	61%	71%	65%	58%	48%	62%	64%	69%	53%	42%	45%	62%	71%	40%	59%	77%
2017	61%	60%	65%	61%	33%	49%	63%	61%	57%	55%	55%	70%	60%	59%	56%	76%	80%	65%	60%	44%	n/a	60%	63%	56%	70%	77%
2016	50%	56%	58%	57%	40%	37%	57%	62%	53%	58%	60%	67%	65%	65%	59%	68%	55%	72%	60%	38%	n/a	57%	56%	35%	62%	75%

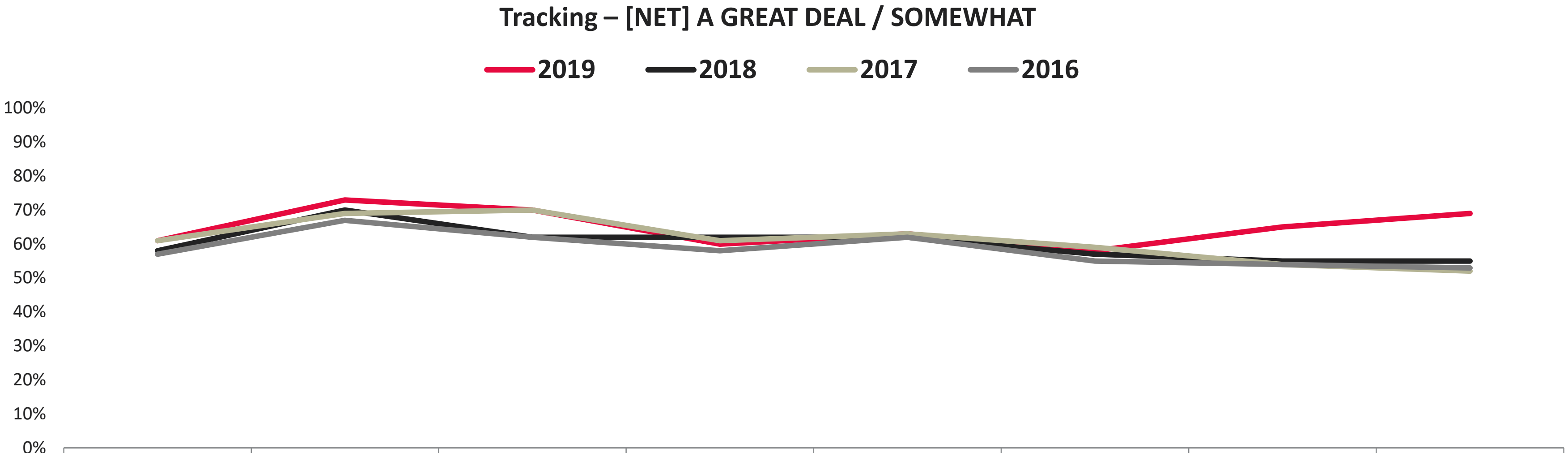
Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy? [Foreign Government]
Base: A Great Deal / Somewhat More Concerned About Online Privacy 2016 (n=13,867); 2017 (n=12,956); 2018 (n=12,956); 2018 (n=12,468); 2019 (n=13,670) NOT ASKED IN CHINA

Opinions vary only slightly as a majority, regardless of the economy, are inclined to blame foreign governments for their heightened concerns regarding online privacy.



Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy? [Foreign Government]
Base: A Great Deal / Somewhat More Concerned About Online Privacy 2016 (n=13,867); 2017 (n=12,956); 2018 (n=12,956); 2019 (n=13,670) NOT ASKED IN CHINA

There has been a sizeable increase in the proportion of BRICS (+14 pts), APAC (+10) & LATAM (+8) citizens who believe that foreign governments are at least *somewhat responsible* for heightening their privacy concerns.

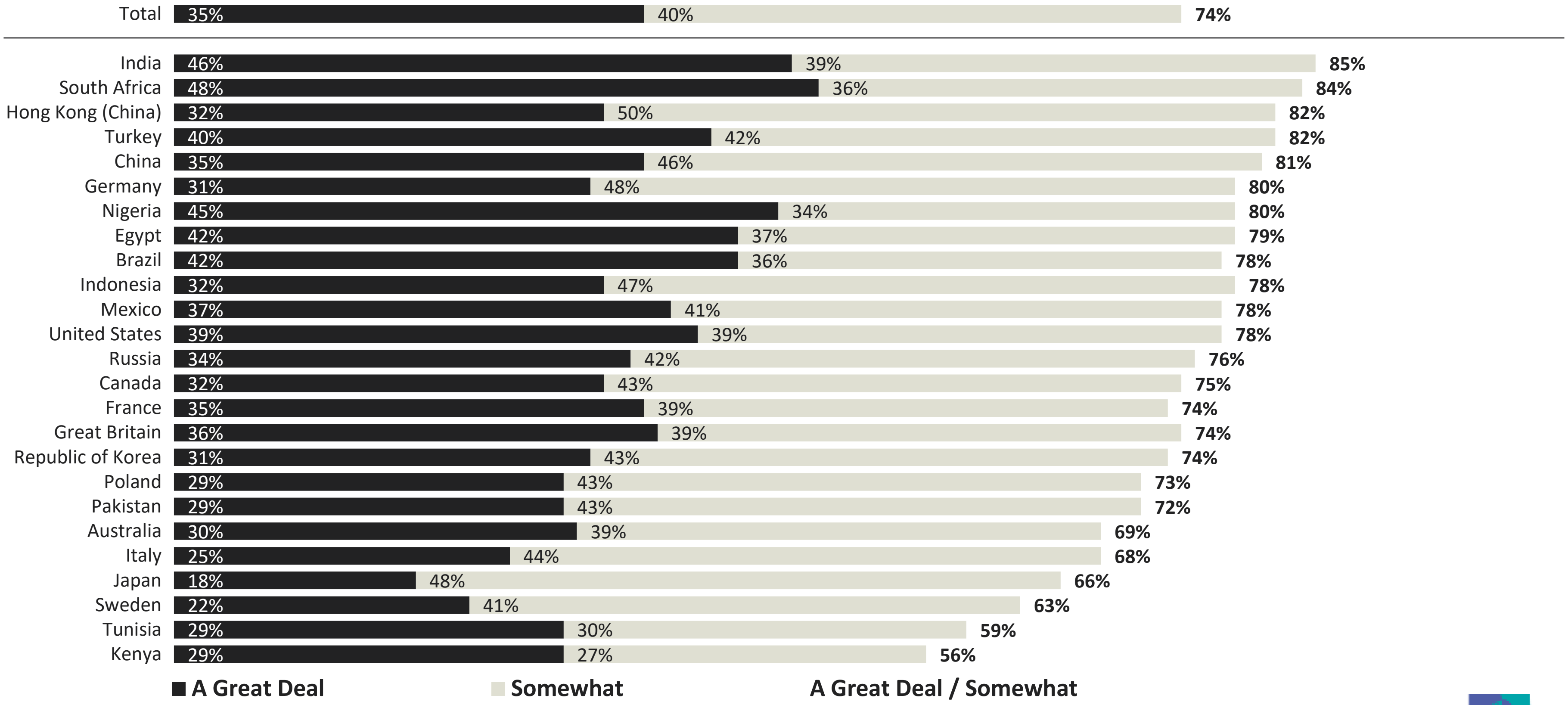


	Total	North America	LATAM	Europe	G-8 Countries	Middle East/Africa	APAC	BRICS
2019	61%	73%	70%	60%	63%	58%	65%	69%
2018	58%	70%	62%	62%	62%	57%	55%	55%
2017	61%	69%	70%	61%	63%	59%	54%	52%
2016	57%	67%	62%	58%	62%	55%	54%	53%

Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy? [Foreign Government]
Base: A Great Deal / Somewhat More Concerned About Online Privacy 2016 (n=13,867); 2017 (n=12,956); 2018 (n=12,956); 2019 (n=13,670) NOT ASKED IN CHINA

INTERNET COMPANIES

Three quarters (74%) of global citizens feel as though Internet companies have been part of the problem when it comes to increasing concerns about online privacy.

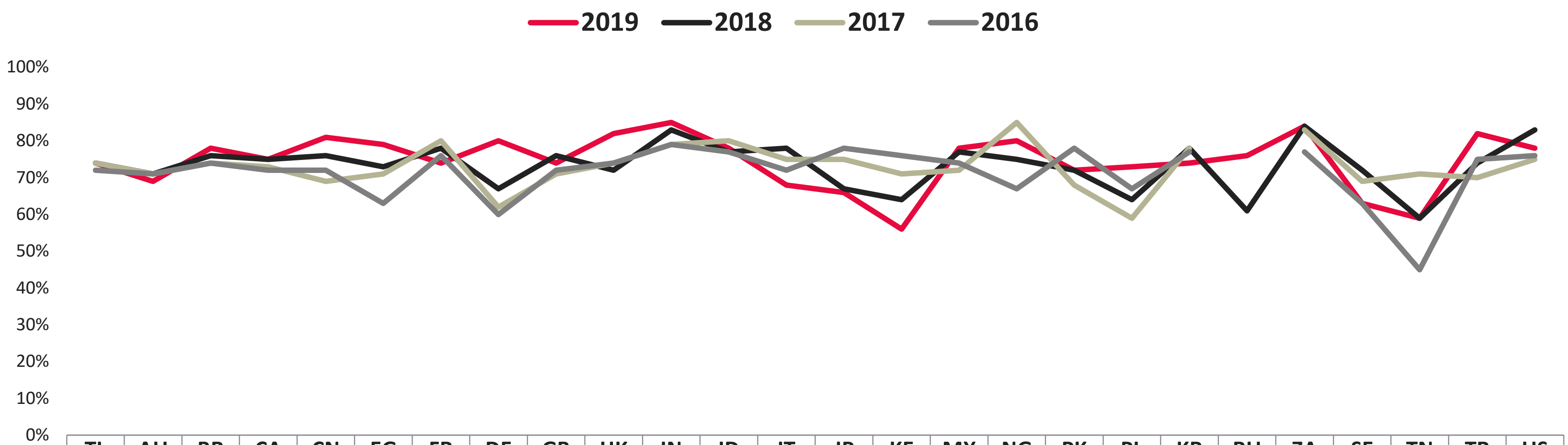


Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy? [Internet companies]
Base: A Great Deal / Somewhat More Concerned About Online Privacy 2019 (n=14,164)

INTERNET COMPANIES

Relative to the 2018 survey, opinions are unchanged as three in four (74%) continue to ascribe at least some responsibility to Internet companies.

Tracking – [NET] A GREAT DEAL/SOMEWHAT

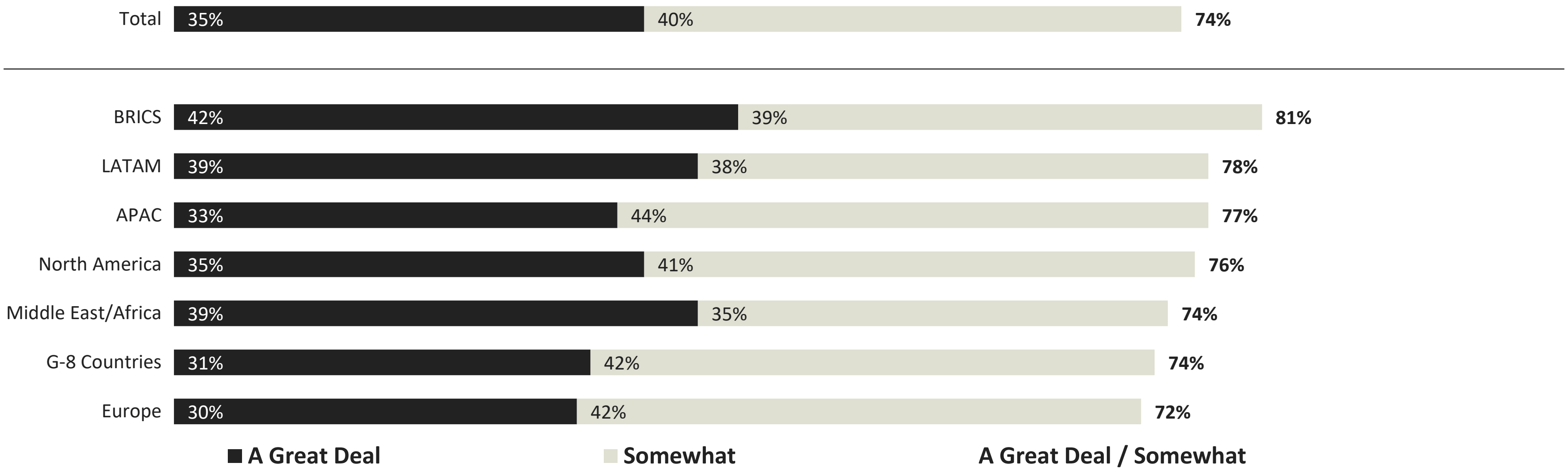


	TL	AU	BR	CA	CN	EG	FR	DE	GB	HK	IN	ID	IT	JP	KE	MX	NG	PK	PL	KR	RU	ZA	SE	TN	TR	US
2019	74%	69%	78%	75%	81%	79%	74%	80%	74%	82%	85%	78%	68%	66%	56%	78%	80%	72%	73%	74%	76%	84%	63%	59%	82%	78%
2018	74%	71%	76%	75%	76%	73%	78%	67%	76%	72%	83%	77%	78%	67%	64%	77%	75%	72%	64%	78%	61%	84%	72%	59%	74%	83%
2017	74%	71%	74%	73%	69%	71%	80%	62%	71%	74%	79%	80%	75%	75%	71%	72%	85%	68%	59%	78%	n/a	83%	69%	71%	70%	75%
2016	72%	71%	74%	72%	72%	63%	76%	60%	72%	74%	79%	77%	72%	78%	76%	74%	67%	78%	67%	77%	n/a	77%	63%	45%	75%	76%

Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy? [Internet companies]
Base: A Great Deal / Somewhat More Concerned About Online Privacy 2016 (n=13,867); 2017 (n=12,956); 2018 (n=12,956); 2019 (n=14,164)

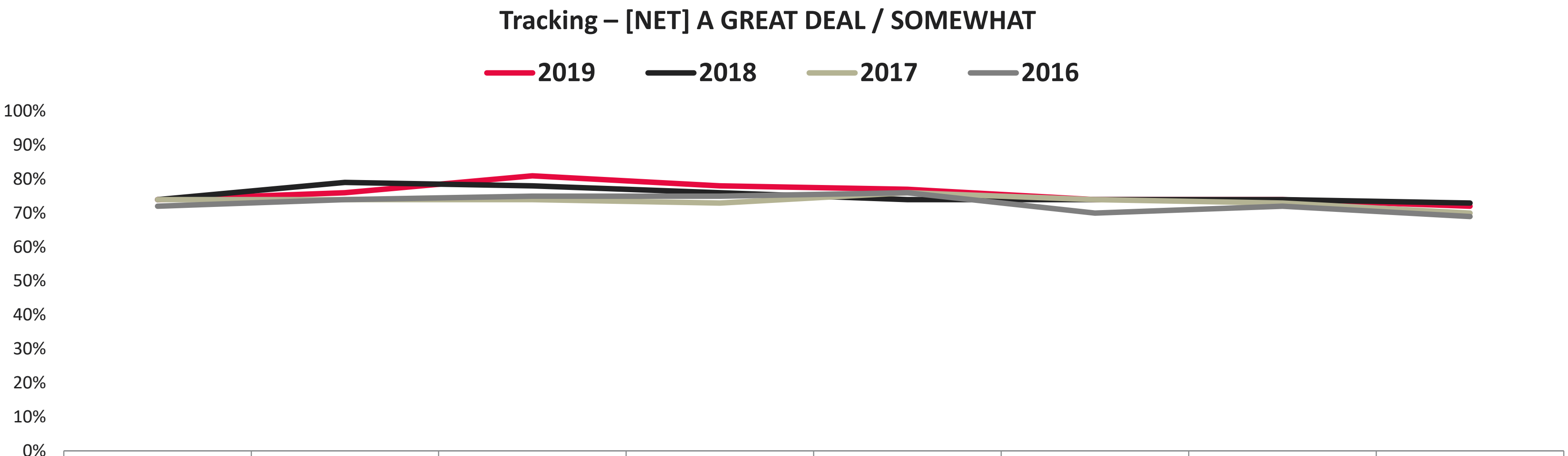
INTERNET COMPANIES

There is less regional variation, with between seven & eight in ten across all regions acknowledging that Internet companies are at least *somewhat responsible* for increasing their online privacy concerns.



Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy? [Internet companies]
Base: A Great Deal / Somewhat More Concerned About Online Privacy 2019 (n=14,164)

Over the past year, there has been limited regional movement on this metric.

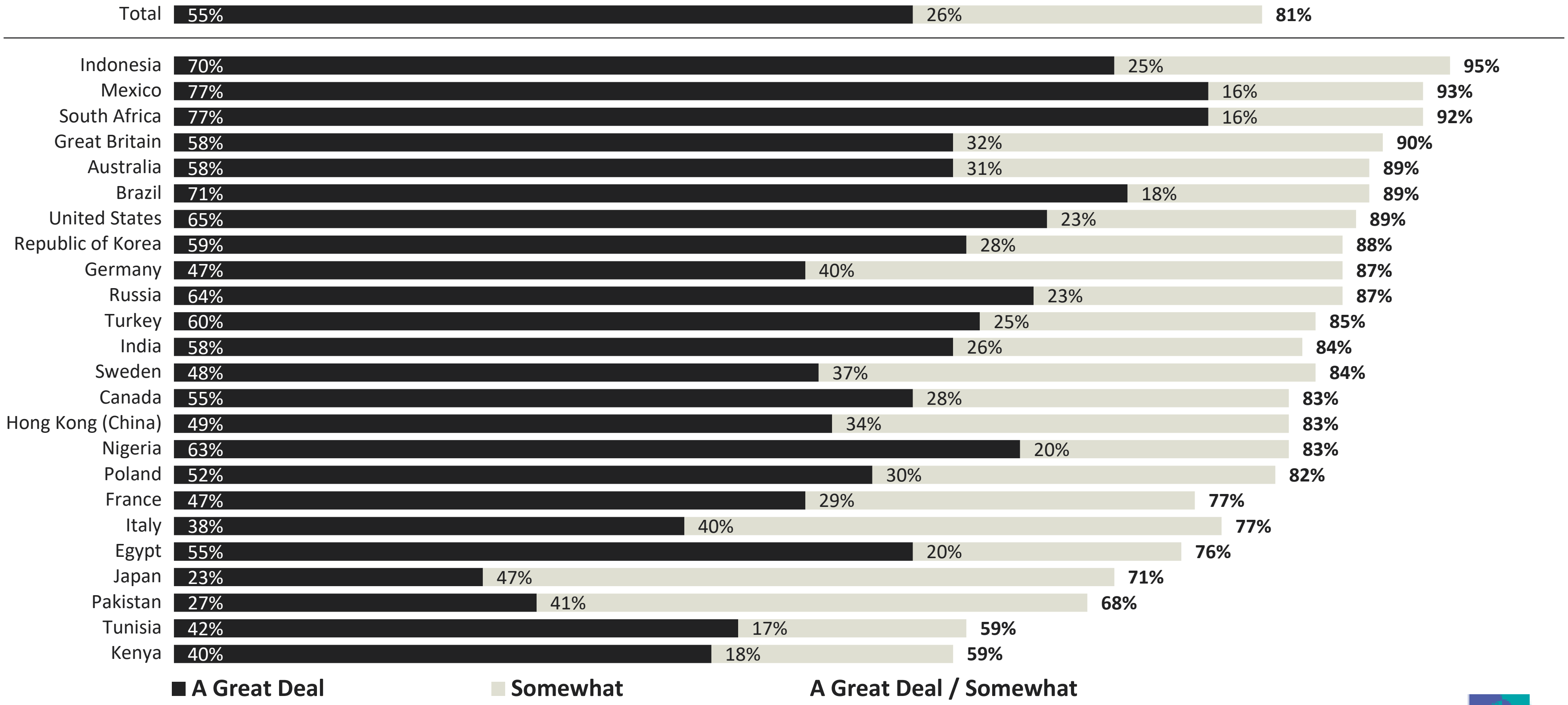


	Total	North America	BRICS	LATAM	APAC	Middle East/Africa	G-8 Countries	Europe
2019	74%	76%	81%	78%	77%	74%	74%	72%
2018	74%	79%	78%	76%	74%	74%	74%	73%
2017	74%	74%	74%	73%	76%	74%	73%	70%
2016	72%	74%	75%	75%	76%	70%	72%	69%

Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy? [Internet companies]
Base: A Great Deal / Somewhat More Concerned About Online Privacy 2016 (n=13,867); 2017 (n=12,956); 2018 (n=12,956); 2019 (n=14,164)

CYBER CRIMINALS

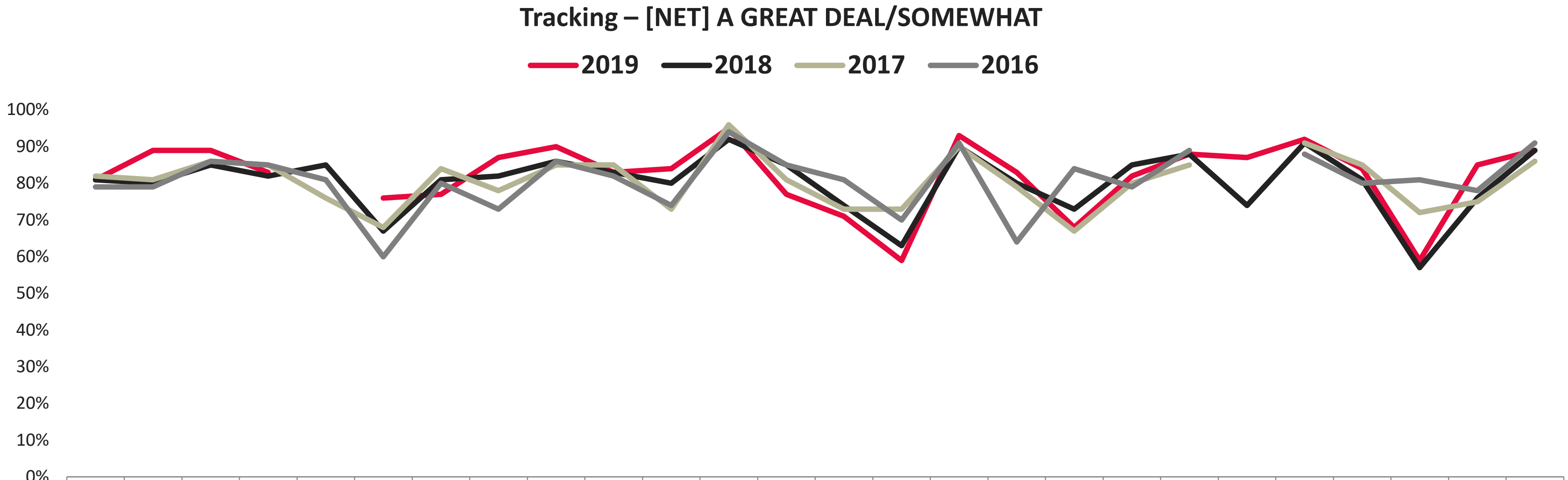
The vast majority (81%) of global citizens think that cyber criminals have contributed, at least *somewhat*, to increasing their online privacy concerns, including virtually all Indonesians (95%).



Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy? [Cyber Criminals]
Base: A Great Deal / Somewhat More Concerned About Online Privacy 2019 (n=13,670) NOT ASKED IN CHINA

CYBER CRIMINALS

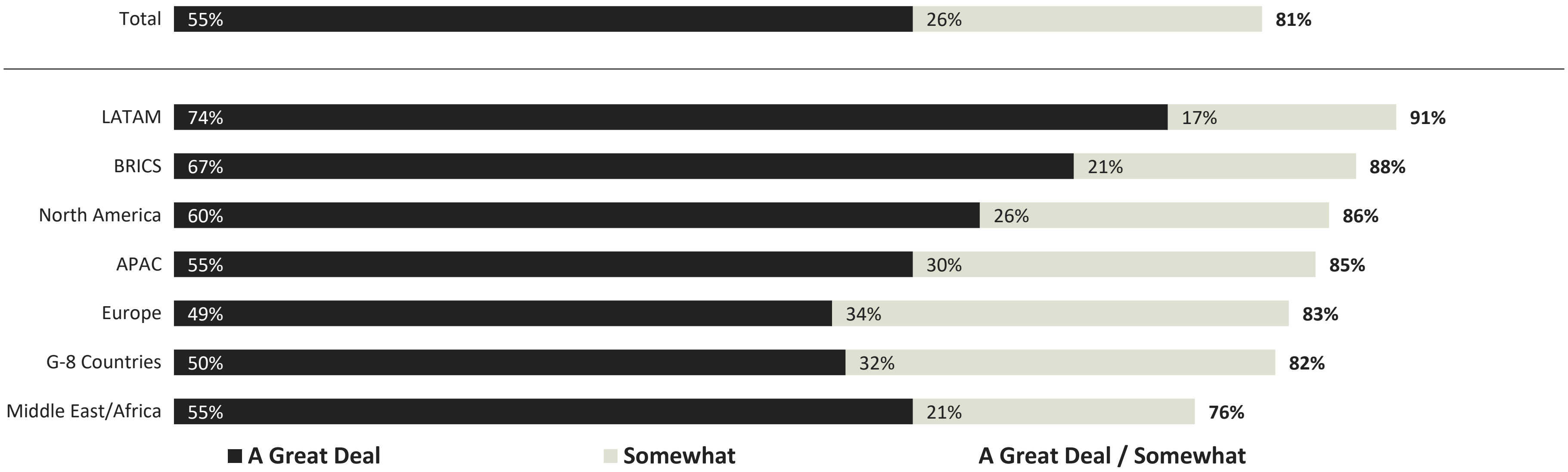
Regarding cyber criminals, the greatest year-over-year shifts in opinion occurred in Russia (+13 pts), Turkey (+9), Egypt (+9), Australia (+9), and Italy (-8).



	TL	AU	BR	CA	CN	EG	FR	DE	GB	HK	IN	ID	IT	JP	KE	MX	NG	PK	PL	KR	RU	ZA	SE	TN	TR	US
2019	81%	89%	89%	83%	n/a	76%	77%	87%	90%	83%	84%	95%	77%	71%	59%	93%	83%	68%	82%	88%	87%	92%	84%	59%	85%	89%
2018	81%	80%	85%	82%	85%	67%	81%	82%	86%	83%	80%	92%	85%	74%	63%	90%	80%	73%	85%	88%	74%	91%	81%	57%	76%	89%
2017	82%	81%	86%	85%	76%	68%	84%	78%	85%	85%	73%	96%	81%	73%	73%	90%	79%	67%	80%	85%	n/a	91%	85%	72%	75%	86%
2016	79%	79%	86%	85%	81%	60%	80%	73%	86%	82%	74%	94%	85%	81%	70%	91%	64%	84%	79%	89%	n/a	88%	80%	81%	78%	91%

Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy? [Cyber Criminals]
Base: A Great Deal / Somewhat More Concerned About Online Privacy 2016 (n=13,867); 2017 (n=12,956); 2018 (n=12,956); 2019 (n=13,670) NOT ASKED IN CHINA

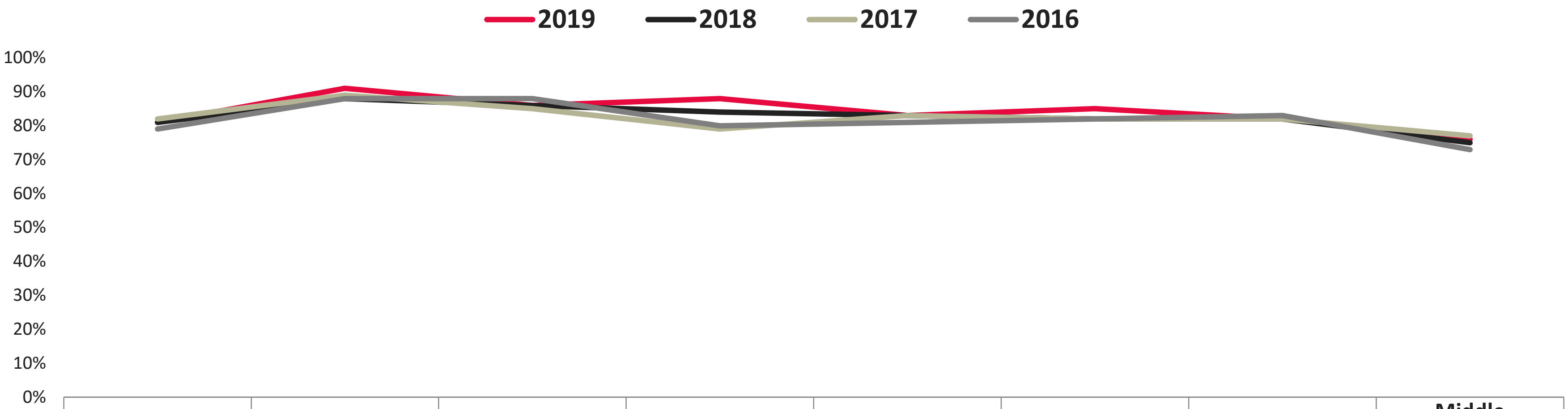
Once again, there is limited regional variation in opinion, though concerns are more pronounced in LATAM (91% say their opinions have been influenced by cyber criminals) and less so in the Middle East & Africa (76%).



Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy? [Cyber Criminals]
Base: A Great Deal / Somewhat More Concerned About Online Privacy 2019 (n=13,670) NOT ASKED IN CHINA

Compared to a year ago, there has been limited movement in opinion, across all regions.

Tracking – [NET] A GREAT DEAL / SOMEWHAT

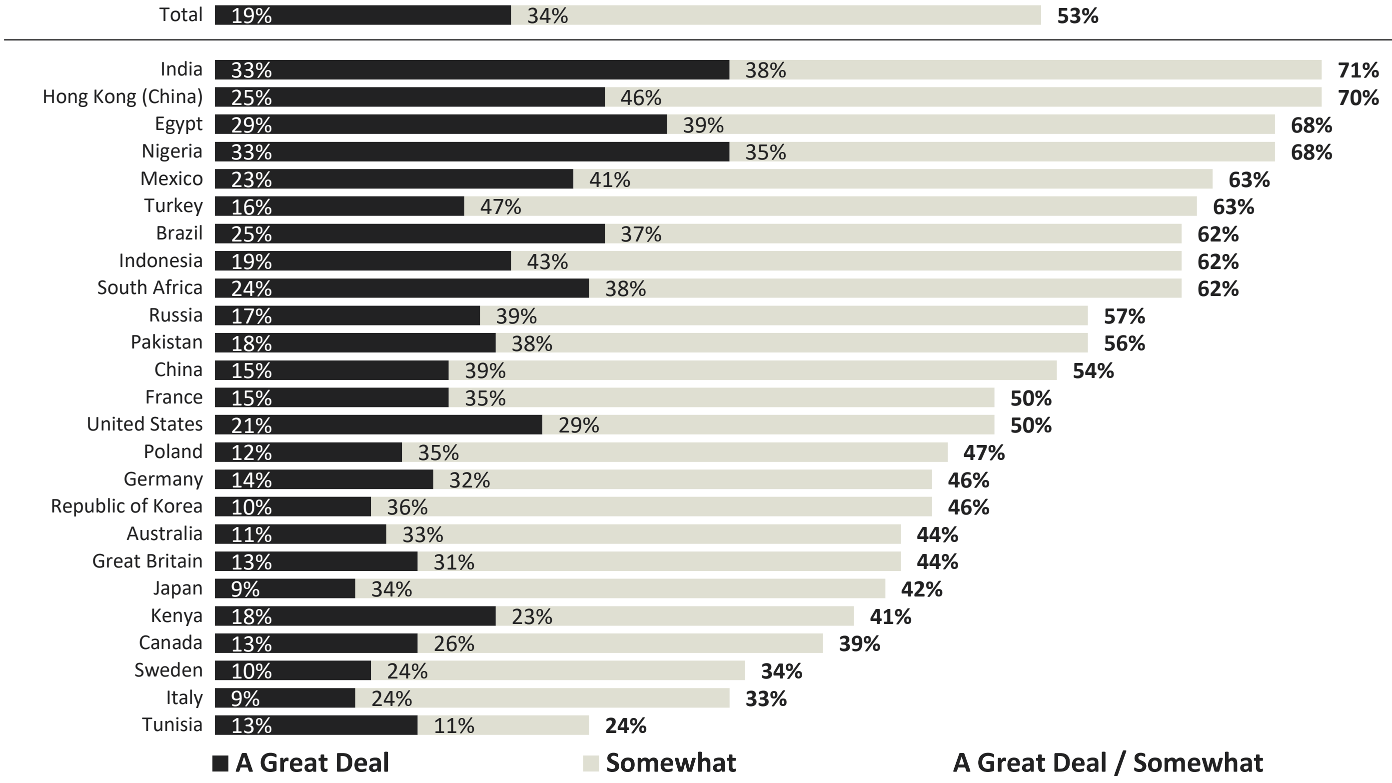


	Total	LATAM	North America	BRICS	Europe	APAC	G-8 Countries	Middle East/Africa
2019	81%	91%	86%	88%	83%	85%	82%	76%
2018	81%	88%	86%	84%	83%	82%	82%	75%
2017	82%	89%	85%	79%	83%	82%	82%	77%
2016	79%	88%	88%	80%	81%	82%	83%	73%

Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy? [Cyber Criminals]
Base: A Great Deal / Somewhat More Concerned About Online Privacy 2016 (n=13,867); 2017 (n=12,956); 2018 (n=12,956); 2019 (n=13,670) NOT ASKED IN CHINA

EMPLOYERS

A majority (53%) cite their employer as a contributing factor when it comes to online privacy concerns, ranging from seven in ten in India (71%) & Hong Kong (China) (70%) to just one quarter (24%) in Tunisia.



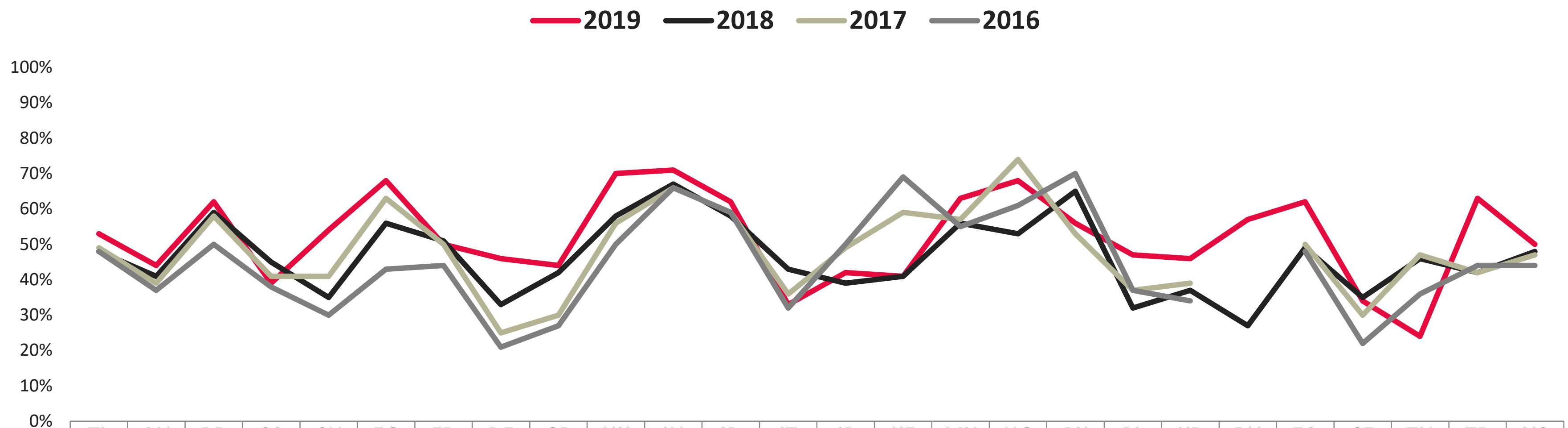
Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy? [Employers]

Base: A Great Deal / Somewhat More Concerned About Online Privacy 2019 (n=14,164)

EMPLOYERS

There has been a significant increase (+5 pts) in the incidence of global citizens who are concerned about their employer jeopardizing their online privacy, with the largest increases occurring in Russia (+30), Turkey (+21), and China (+19). Somewhat interestingly, Tunisia (-22) registers a sizeable drop on this metric.

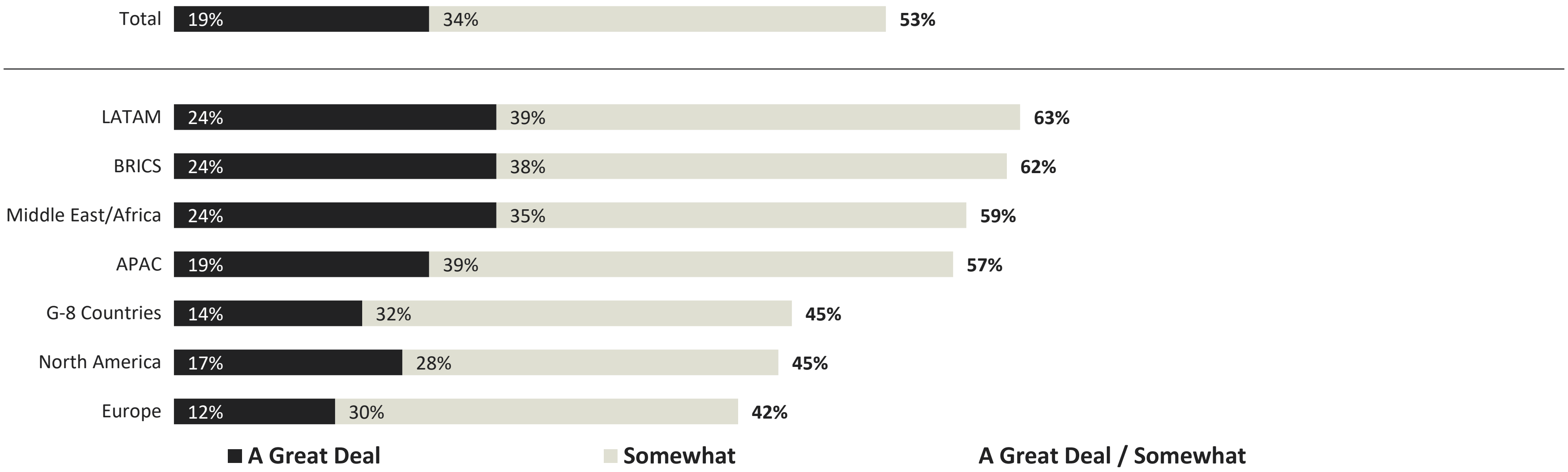
Tracking – [NET] A GREAT DEAL/SOMEWHAT



	TL	AU	BR	CA	CN	EG	FR	DE	GB	HK	IN	ID	IT	JP	KE	MX	NG	PK	PL	KR	RU	ZA	SE	TN	TR	US
2019	53%	44%	62%	39%	54%	68%	50%	46%	44%	70%	71%	62%	33%	42%	41%	63%	68%	56%	47%	46%	57%	62%	34%	24%	63%	50%
2018	48%	41%	59%	45%	35%	56%	51%	33%	42%	58%	67%	58%	43%	39%	41%	56%	53%	65%	32%	37%	27%	49%	35%	46%	42%	48%
2017	49%	39%	58%	41%	41%	63%	50%	25%	30%	56%	66%	59%	36%	49%	59%	57%	74%	53%	37%	39%	n/a	50%	30%	47%	42%	47%
2016	48%	37%	50%	38%	30%	43%	44%	21%	27%	50%	66%	59%	32%	50%	69%	55%	61%	70%	37%	34%	n/a	48%	22%	36%	44%	44%

Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy? [Employers]
Base: A Great Deal / Somewhat More Concerned About Online Privacy 2016 (n=13,867); 2017 (n=12,956); 2018 (n=12,956); 2019 (n=14,164)

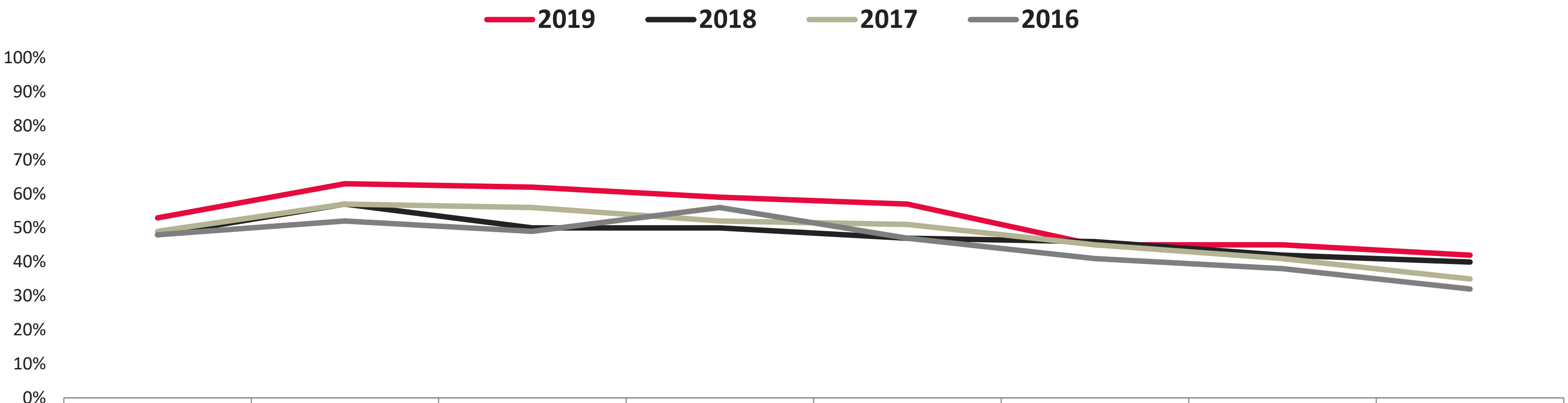
Online privacy concerns as they relate to employers tend to be much higher in developing economies.



Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy? [Employers]
Base: A Great Deal / Somewhat More Concerned About Online Privacy 2019 (n=14,164)

Across all regions, save for North America, there has been an increase in the proportion who assign at least some blame to their employer, for increasing their online privacy concerns. The greatest shifts in opinion are in BRICS (+12 pts), APAC (+10), the Middle East & Africa (+9).

Tracking – [NET] A GREAT DEAL / SOMEWHAT

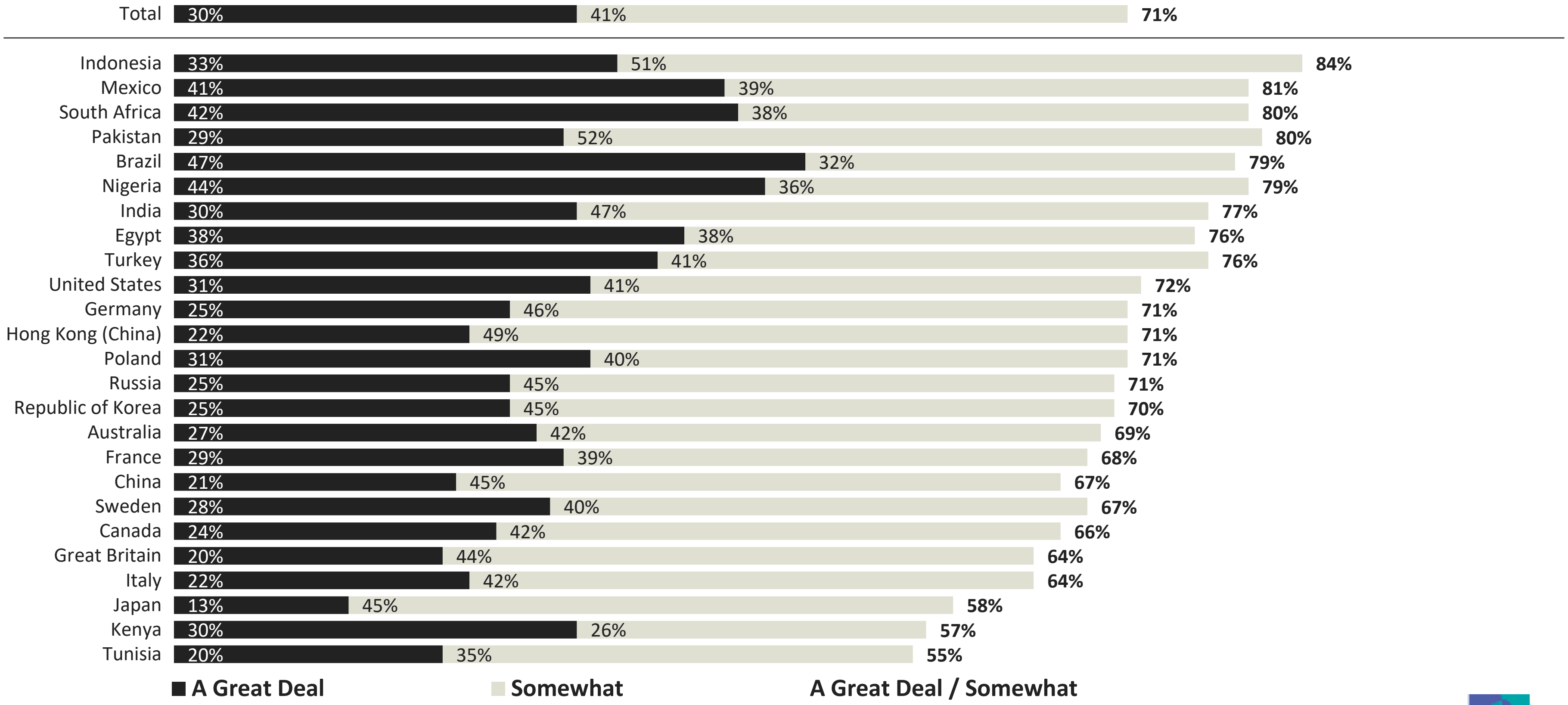


	Total	LATAM	BRICS	Middle East/Africa	APAC	North America	G-8 Countries	Europe
2019	53%	63%	62%	59%	57%	45%	45%	42%
2018	48%	57%	50%	50%	47%	46%	42%	40%
2017	49%	57%	56%	52%	51%	45%	41%	35%
2016	48%	52%	49%	56%	47%	41%	38%	32%

Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy? [Employers]
Base: A Great Deal / Somewhat More Concerned About Online Privacy 2016 (n=13,867); 2017 (n=12,956); 2018 (n=12,956); 2019 (n=14,164)

OTHER INTERNET USERS

Seven in ten (71%) global citizens think that other Internet users are contributing sources when it comes to their growing online privacy concerns, with highs of 84% in Indonesia and lows of 55% in Tunisia.

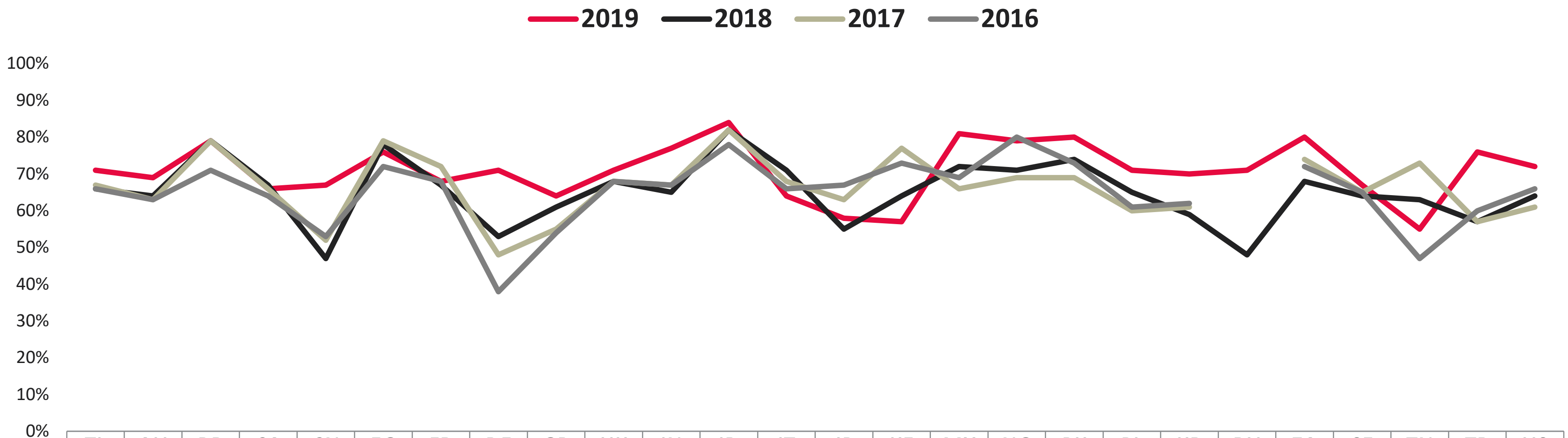


Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy?
[Other Internet Users] Base: A Great Deal / Somewhat More Concerned About Online Privacy 2019 (n=14,164)

OTHER INTERNET USERS

On balance, there has been a significant increase in the proportion of global citizens who view other Internet users as contributors (+5 pts), led by citizens living in Russia (+23), China (+20), Turkey (+19) & Germany (+18).

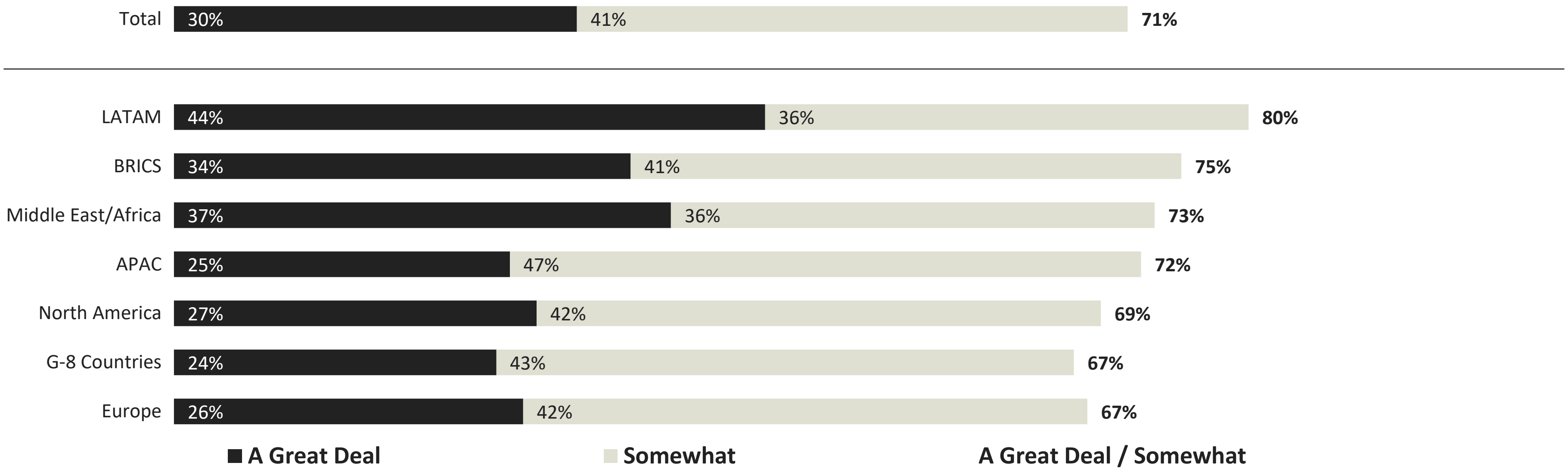
Tracking – [NET] A GREAT DEAL/SOMEWHAT



	TL	AU	BR	CA	CN	EG	FR	DE	GB	HK	IN	ID	IT	JP	KE	MX	NG	PK	PL	KR	RU	ZA	SE	TN	TR	US
2019	71%	69%	79%	66%	67%	76%	68%	71%	64%	71%	77%	84%	64%	58%	57%	81%	79%	80%	71%	70%	71%	80%	67%	55%	76%	72%
2018	66%	64%	79%	67%	47%	78%	67%	53%	61%	68%	65%	82%	71%	55%	64%	72%	71%	74%	65%	59%	48%	68%	64%	63%	57%	64%
2017	67%	63%	79%	66%	52%	79%	72%	48%	55%	68%	67%	82%	68%	63%	77%	66%	69%	69%	60%	61%	n/a	74%	65%	73%	57%	61%
2016	66%	63%	71%	64%	53%	72%	68%	38%	54%	68%	67%	78%	66%	67%	73%	69%	80%	73%	61%	62%	n/a	72%	65%	47%	60%	66%

Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy?
[Other Internet Users] Base: A Great Deal / Somewhat More Concerned About Online Privacy 2016 (n=13,867); 2017 (n=12,956); 2018 (n=12,956); 2019 (n=14,164)

Citizens living in developing economies tend to be more inclined to think that other Internet users are contributing to their online privacy concerns.

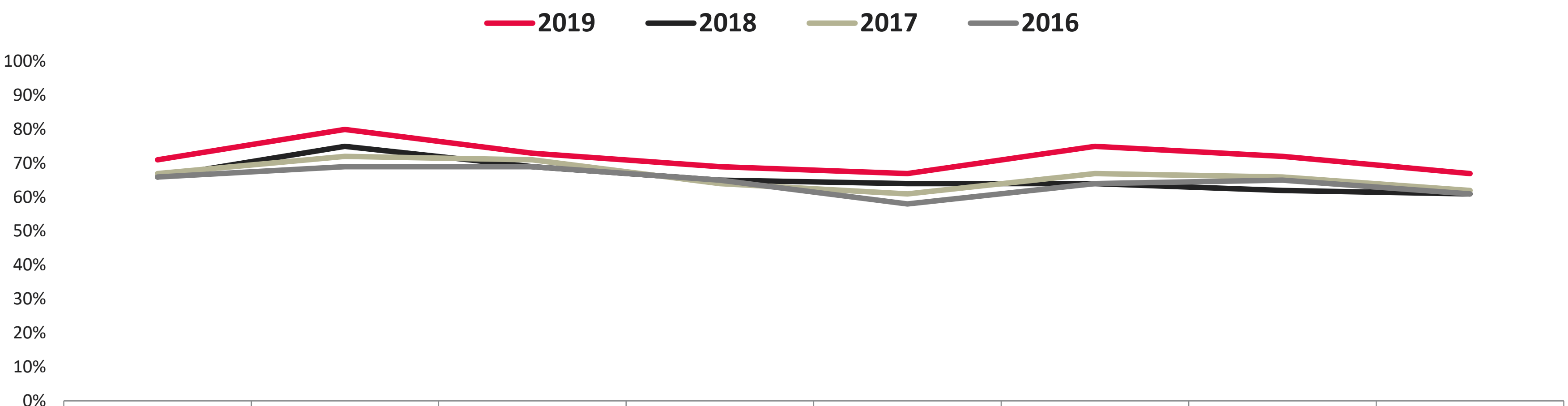


Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy?
[Other Internet Users] Base: A Great Deal / Somewhat More Concerned About Online Privacy 2019 (n=14,164)

OTHER INTERNET USERS

Across all regions, a higher proportion thinks that other Internet users contribute to online privacy concerns, compared to a year ago, with the largest increases occurring in the BRICS (+11 pts) & APAC (+10) economies.

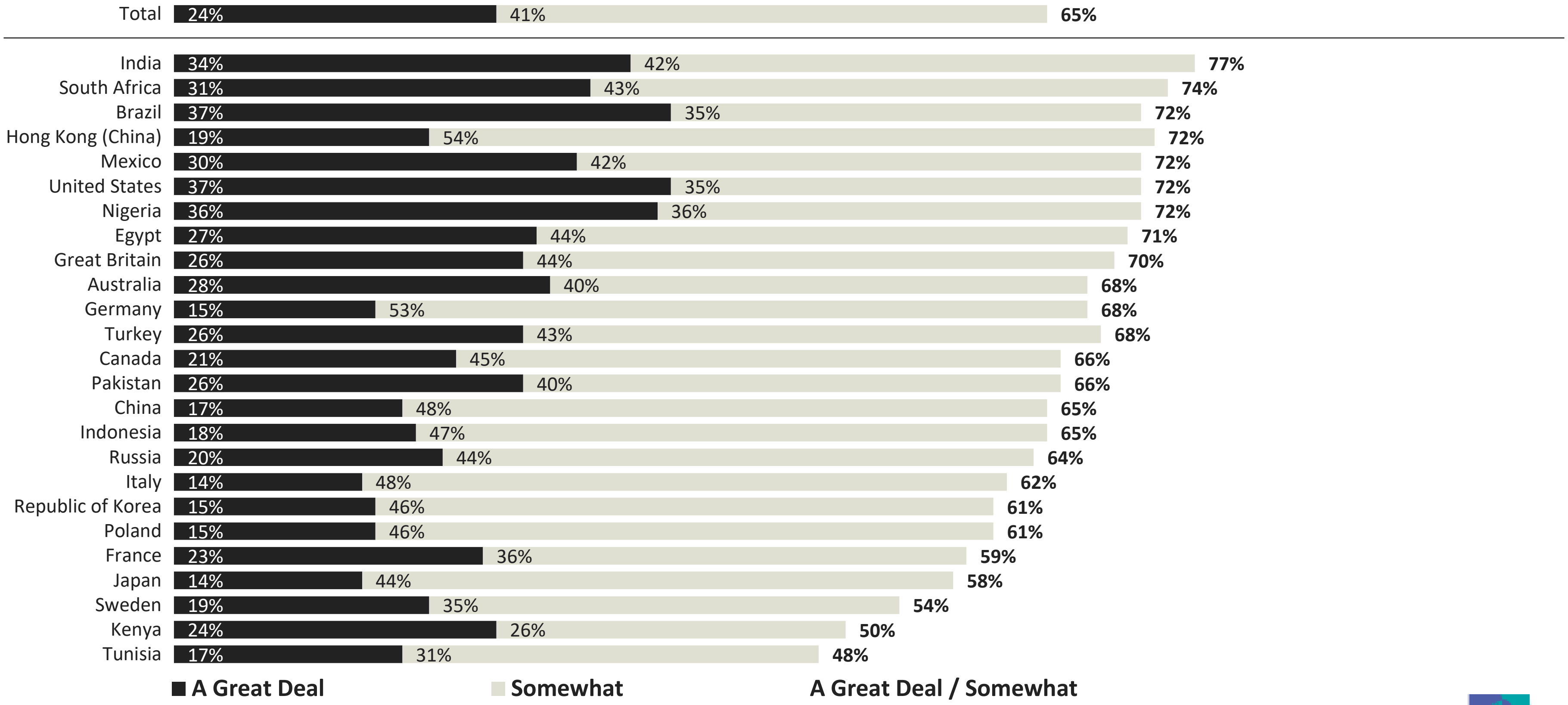
Tracking – [NET] A GREAT DEAL / SOMEWHAT



	Total	LATAM	Middle East/Africa	North America	Europe	BRICS	APAC	G-8 Countries
2019	71%	80%	73%	69%	67%	75%	72%	67%
2018	66%	75%	69%	65%	64%	64%	62%	61%
2017	67%	72%	71%	64%	61%	67%	66%	62%
2016	66%	69%	69%	65%	58%	64%	65%	61%

Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy?
[Other Internet Users] Base: A Great Deal / Somewhat More Concerned About Online Privacy 2016 (n=13,867); 2017 (n=12,956); 2018 (n=12,956); 2019 (n=14,164)

Two-thirds (65%) of global citizens think that private companies are at least *somewhat responsible* for their online privacy concerns. Aside from Tunisia & Kenya, however, majorities in all economies feel this way.

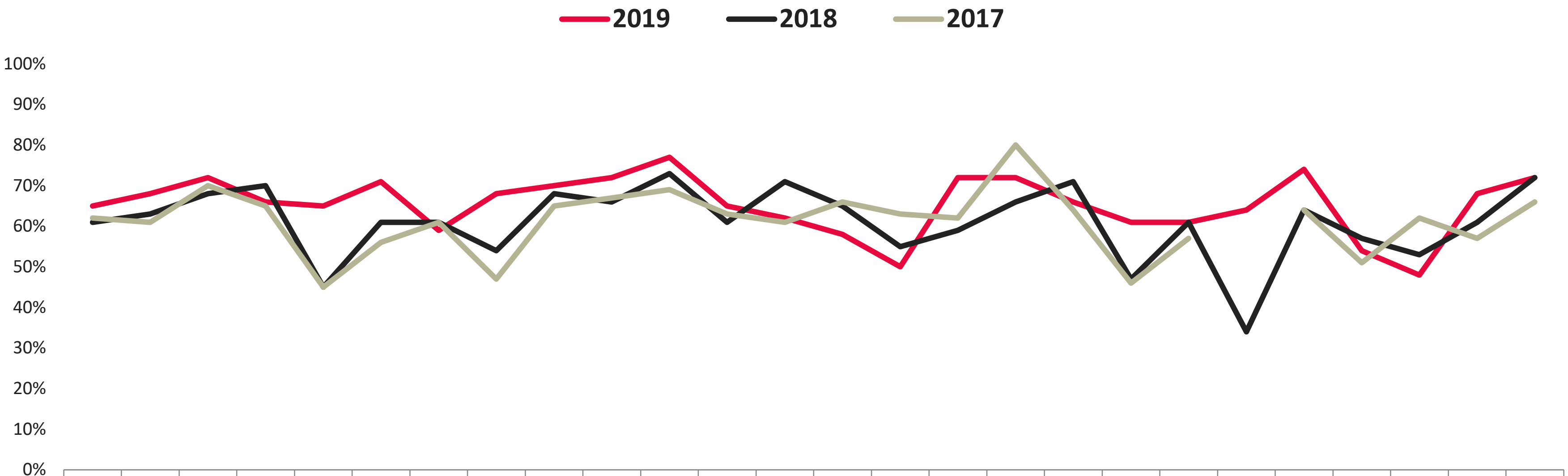


Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy? [Companies in general]
Base: A Great Deal / Somewhat More Concerned About Online Privacy 2019 (n=14,164)

COMPANIES IN GENERAL

Over the past year, there has been an increase (+4 pts) in the proportion of global citizens who think that private companies are contributors, a figure which is largely driven by those living in Russia (+30) & China (+20).

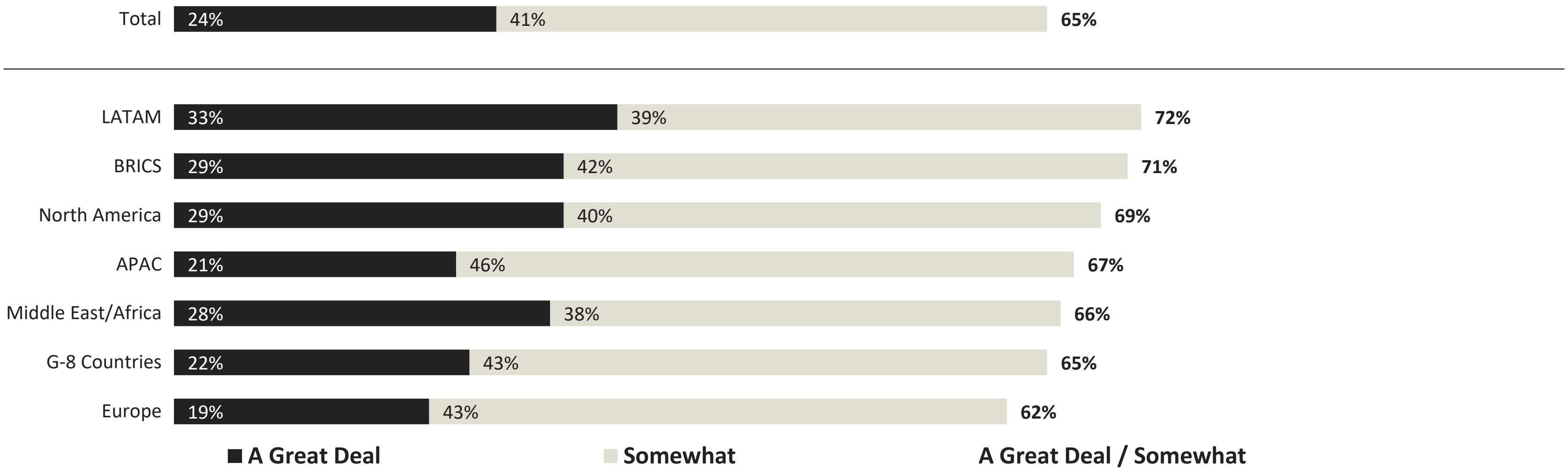
Tracking – [NET] A GREAT DEAL/SOMEWHAT



	TL	AU	BR	CA	CN	EG	FR	DE	GB	HK	IN	ID	IT	JP	KE	MX	NG	PK	PL	KR	RU	ZA	SE	TN	TR	US
2019	65%	68%	72%	66%	65%	71%	59%	68%	70%	72%	77%	65%	62%	58%	50%	72%	72%	66%	61%	61%	64%	74%	54%	48%	68%	72%
2018	61%	63%	68%	70%	45%	61%	61%	54%	68%	66%	73%	61%	71%	65%	55%	59%	66%	71%	47%	61%	34%	64%	57%	53%	61%	72%
2017	62%	61%	70%	65%	45%	56%	61%	47%	65%	67%	69%	63%	61%	66%	63%	62%	80%	64%	46%	57%	n/a	64%	51%	62%	57%	66%

Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy? [Companies in general]
Base: A Great Deal / Somewhat More Concerned About Online Privacy 2017 (n=12,956); 2018 (n=12,956); 2019 (n=14,164)

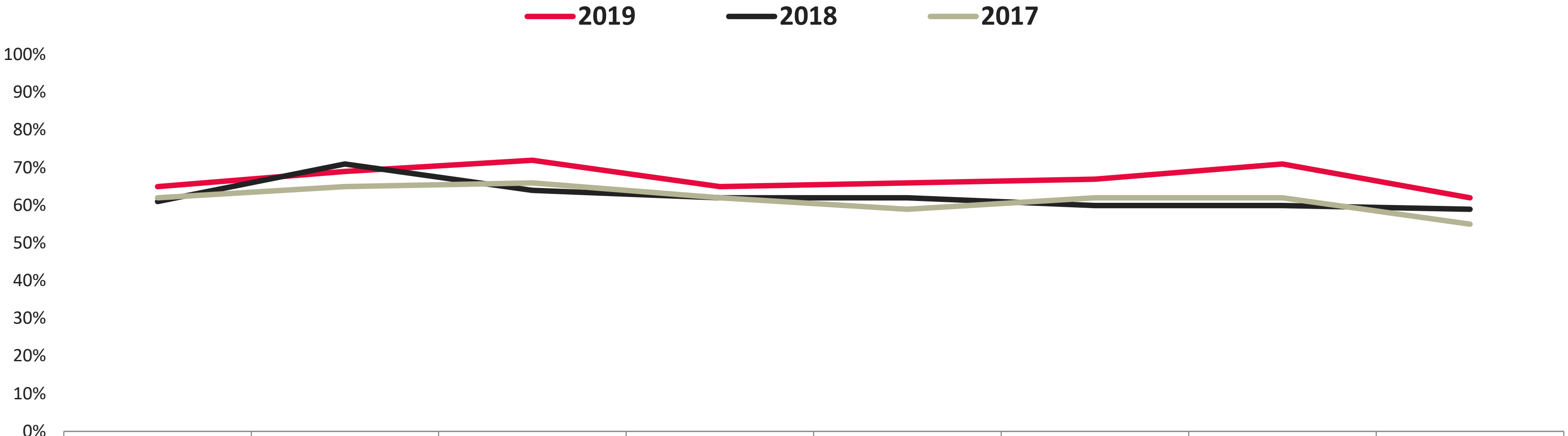
Regionally, there is limited variation, with most assigning at least some responsibility to companies in general in each of the regional economies surveyed.



Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy? [Companies in general]
Base: A Great Deal / Somewhat More Concerned About Online Privacy 2019 (n=14,164)

Since 2018, the proportion who view companies as being at least partially responsible has increased in all regions, save for North America (-2 pts), with the BRICS economies registering the largest increase (+11), over the previous wave.

Tracking – [NET] A GREAT DEAL / SOMEWHAT



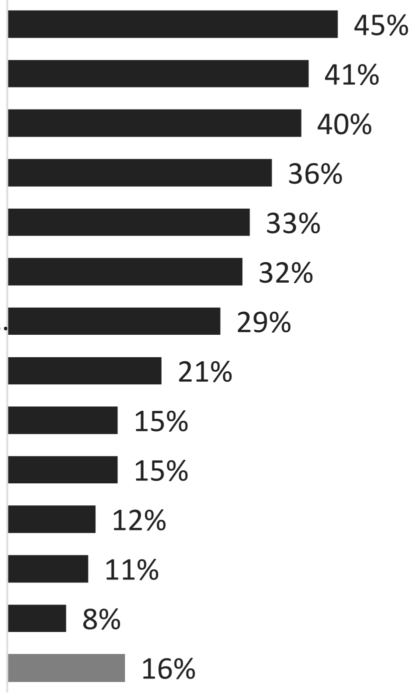
	Total	North America	LATAM	G-8 Countries	Middle East/Africa	APAC	BRICS	Europe
2019	65%	69%	72%	65%	66%	67%	71%	62%
2018	61%	71%	64%	62%	62%	60%	60%	59%
2017	62%	65%	66%	62%	59%	62%	62%	55%

Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy? [Companies in general]
Base: A Great Deal / Somewhat More Concerned About Online Privacy 2017 (n=12,956); 2018 (n=12,956); 2019 (n=14,164)

ONLINE BEHAVIOUR CHANGES

Global citizens are a little more likely to have taken most protective actions, over the past year, save for making fewer online purchases.

Global Total - 2019



	2019	2018	2017	2015	2014
Avoiding opening emails from unknown email addresses	45%	43%	45%	-	-
Disclose less personal information online	41%	NA	NA	NA	NA
Avoiding certain Internet sites	40%	36%	37%	-	-
Using antivirus software	36%	36%	38%	-	-
Changing your password regularly	33%	31%	31%	46%	43%
Avoiding certain web applications	32%	30%	31%	41%	39%
Cutting down on the amount of biographically…	29%	28%	29%	-	-
Self-censoring what you say online	21%	20%	22%	33%	28%
Changing who you communicate with	15%	13%	14%	25%	18%
Doing fewer financial transactions online	15%	14%	15%	-	-
Making fewer on-line purchases	12%	12%	13%	-	-
Closing Facebook and other social media accounts, etc.	11%	10%	10%	15%	11%
Using the Internet less often	8%	7%	9%	13%	10%
None of these	16%	20%	19%	21%	24%

Q3. How have you changed anything about how you behave online compared to one year ago? (Please select all that apply.)
Base: All Respondents Total 2014 (n=23,376); Total 2016 (n=24,143); Total 2017 (n=24,225); Total 2018 (n=24,750); 2019 (n=25,229)

Behavioural changes tend to be more pronounced in the developing economies of the world.

		REGIONS						
	Total	**North America**	**LATAM**	**Europe**	**APAC**	**G-8 Countries**	**BRICS**	**Middle East/Africa**
Base: All Respondents	**n=25229**	**n=2001**	**n=2176**	**n=6009**	**n=8011**	**n=8009**	**n=5169**	**n=6017**
Avoiding opening emails from unknown email addresses	45%	49%	47%	43%	46%	44%	50%	40%
Disclose less personal information online	41%	39%	47%	34%	41%	34%	46%	41%
Avoiding certain Internet sites	40%	39%	52%	34%	37%	34%	48%	38%
Using antivirus software	36%	36%	47%	31%	39%	32%	48%	30%
Changing your password regularly	33%	32%	37%	26%	33%	26%	39%	35%
Avoiding certain web applications	32%	29%	40%	26%	31%	25%	41%	31%
Cutting down on the amount of biographically accurate information you divulge online	29%	26%	36%	23%	30%	23%	31%	24%
Self-censoring what you say online	21%	26%	20%	14%	22%	17%	25%	25%
Changing who you communicate with	15%	15%	15%	8%	15%	10%	21%	17%
Doing fewer financial transactions online	15%	13%	21%	9%	14%	10%	19%	16%
Making fewer on-line purchases	12%	10%	15%	9%	11%	9%	16%	13%
Closing Facebook and other social media accounts, etc.	11%	12%	11%	8%	11%	9%	14%	12%
Using the Internet less often	8%	6%	8%	5%	6%	5%	8%	10%
None of these	16%	22%	7%	25%	15%	26%	8%	10%

Q3. How have you changed anything about how you behave online compared to one year ago? (Please select all that apply.)
Base: All Respondents Total 2019 (n=25,229)

Consistent with the previous wave, avoiding clicking on unknown links & using more privacy settings continue to be the most frequently cited protective online behaviours by global citizens (and growing), when asked to describe how they have changed their online behaviours, over the past year. Two-factor authentication (20%) has grown the most since 2017.

	Global Total - 2019	2018	2017
Avoiding clicking on unknown links in messages	46%	43%	45%
Using more privacy settings	33%	31%	32%
More regular updating of software	29%	28%	28%
Using the Internet more for entertainment	25%	22%	23%
Using two-factor authentication	20%	17%	14%
Using the Internet more for social interaction	19%	19%	18%
Using the Internet more for business or professional work	17%	18%	16%
Making more on-line purchases	15%	15%	13%
Using encrypted communications services	14%	14%	14%
Using a VPN (virtual private network)	12%	11%	10%
None of these	19%	22%	22%

Q4. How else have you changed your behavior? (Please select all that apply.)
Base: All Respondents Total 2017 (n=24,225) ; 2018 (n=24,750); 2019 (n=25,229)

Those living in the BRICS economies are more likely to indicate that they are changing their behaviours in most of the below ways.

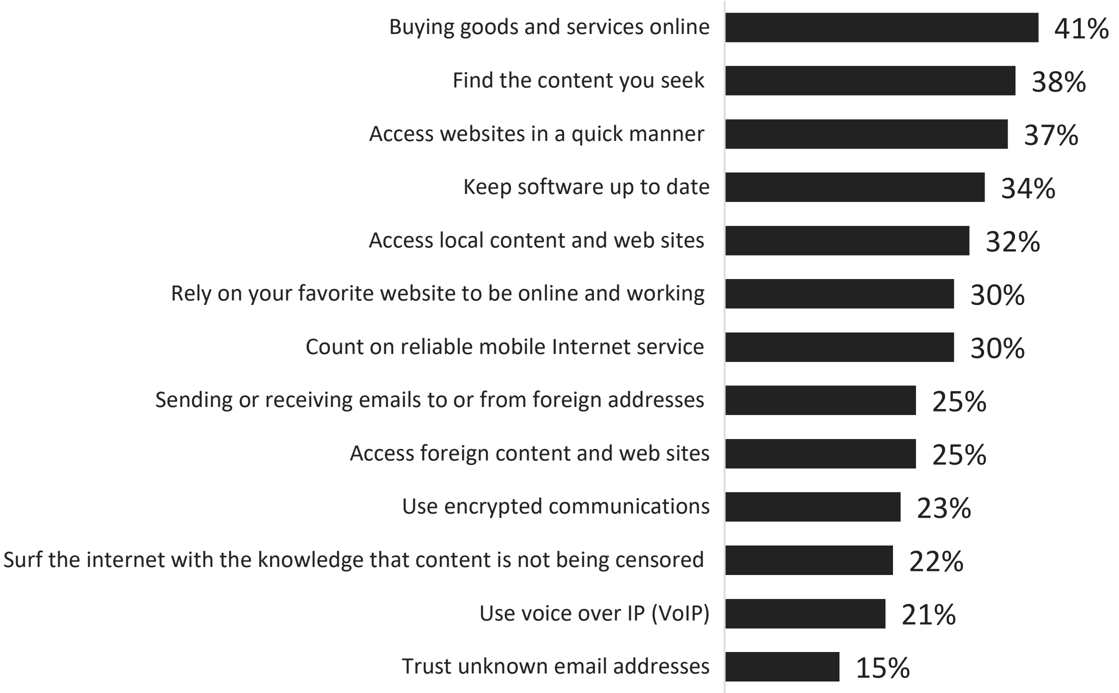
	REGIONS							
	Total	North America	LATAM	Europe	APAC	G-8 Countries	BRICS	Middle East/Africa
Base: All Respondents	n=25229	n=2001	n=2176	n=6009	n=8011	n=8009	n=5169	n=6017
Avoiding clicking on unknown links in messages	46%	47%	55%	42%	48%	43%	56%	42%
Using more privacy settings	33%	32%	34%	24%	34%	24%	41%	37%
More regular updating of software	29%	24%	31%	26%	29%	24%	35%	27%
Using the Internet more for entertainment	25%	21%	33%	17%	22%	17%	30%	27%
Using two-factor authentication	20%	23%	20%	14%	27%	16%	28%	17%
Using the Internet more for social interaction	19%	11%	21%	9%	17%	10%	24%	23%
Using the Internet more for business or professional work	17%	10%	20%	9%	19%	10%	26%	19%
Making more on-line purchases	15%	14%	18%	14%	19%	14%	21%	10%
Using encrypted communications services	14%	8%	17%	9%	18%	8%	22%	15%
Using a VPN (virtual private network)	12%	10%	13%	10%	14%	9%	18%	12%
None of these	19%	26%	8%	28%	17%	31%	9%	18%

Q4. How else have you changed your behavior? (Please select all that apply.)
Base: All Respondents Total 2019 (n=25,229)

INTERNET ACCESS VS. ONE YEAR AGO

Overall, fewer global citizens indicate that it has become *easier* for them to do each of the below activities on the Internet, compared to a year ago, and the longer-term trend appears downwards. For example, only 32% say it's easier to access local content and website than a year ago – down 10 points since 2016.

Global Total - 2019

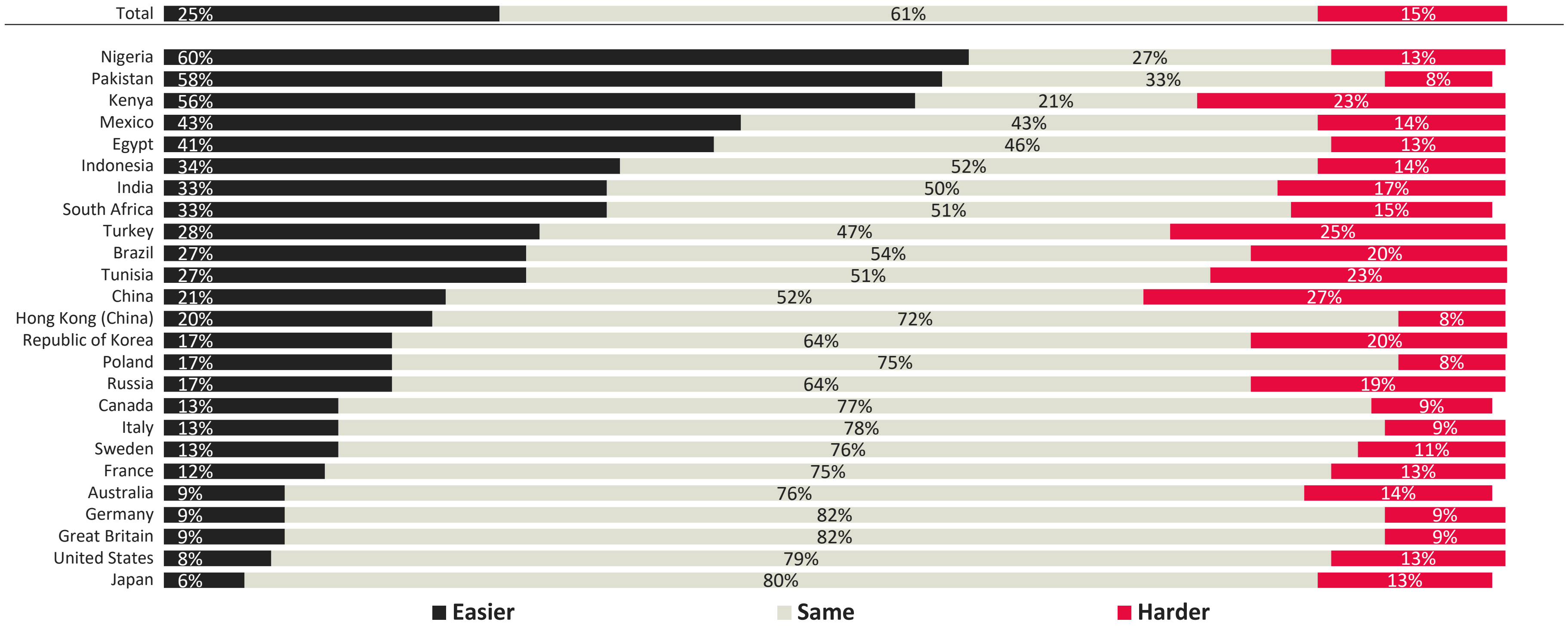


	EASIER		
	2018	**2017**	**2016**
Buying goods and services online	43%	42%	41%
Find the content you seek	42%	41%	46%
Access websites in a quick manner	40%	40%	45%
Keep software up to date	38%	38%	-
Access local content and web sites	36%	35%	42%
Rely on your favorite website to be online and working	33%	33%	39%
Count on reliable mobile Internet service	32%	32%	38%
Sending or receiving emails to or from foreign addresses	29%	29%	35%
Access foreign content and web sites	28%	28%	36%
Use encrypted communications	26%	27%	-
Surf the internet with the knowledge that content is not being censored	24%	25%	29%
Use voice over IP (VoIP)	24%	25%	-
Trust unknown email addresses	NA	NA	NA

Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet:
Base: All Respondents Total 2018 (n=24,235); 2019 (n=25,22)

ACCESS FOREIGN CONTENT AND WEB SITES

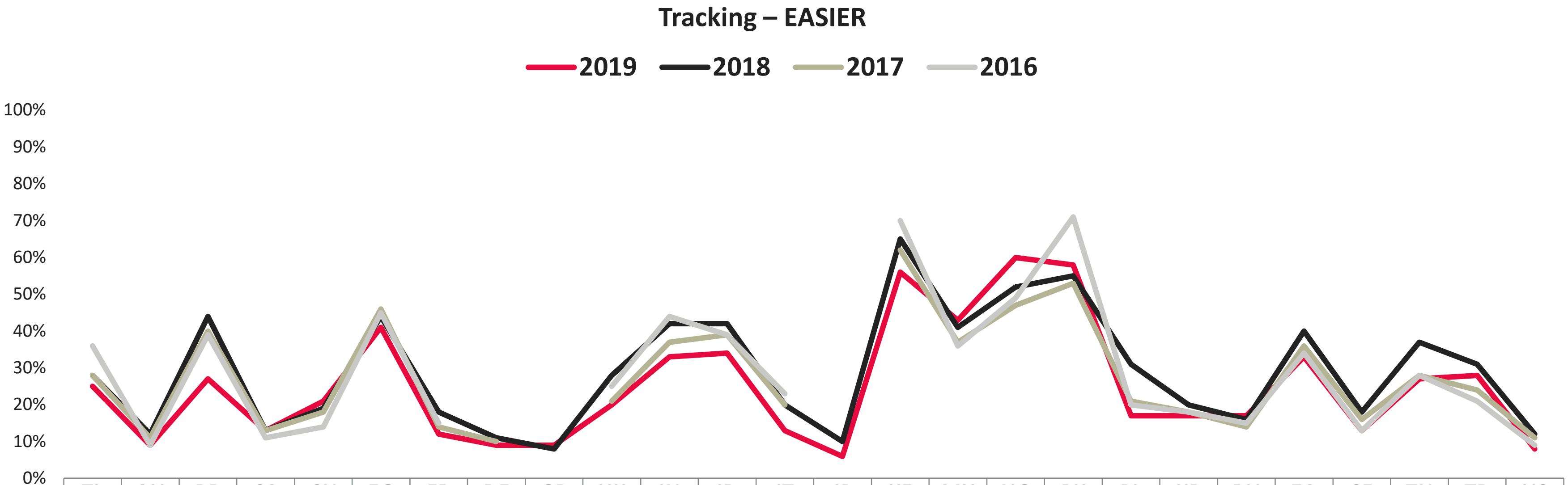
The vast majority (86%) of global citizens think that it is *easier* (25%) or about *as easy* (61%) to access foreign content online, compared to a year ago. Despite this, a greater proportion in the US, China, Japan, Australia, the Republic of Korea, Russia & France actually think that accessing such content has become *harder* instead of *easier.*



Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet: [Access foreign content and web sites]
Base: All Respondents Total 2019 (n=25,229)

Total may not sum to 100% as DK/Refuse not shown

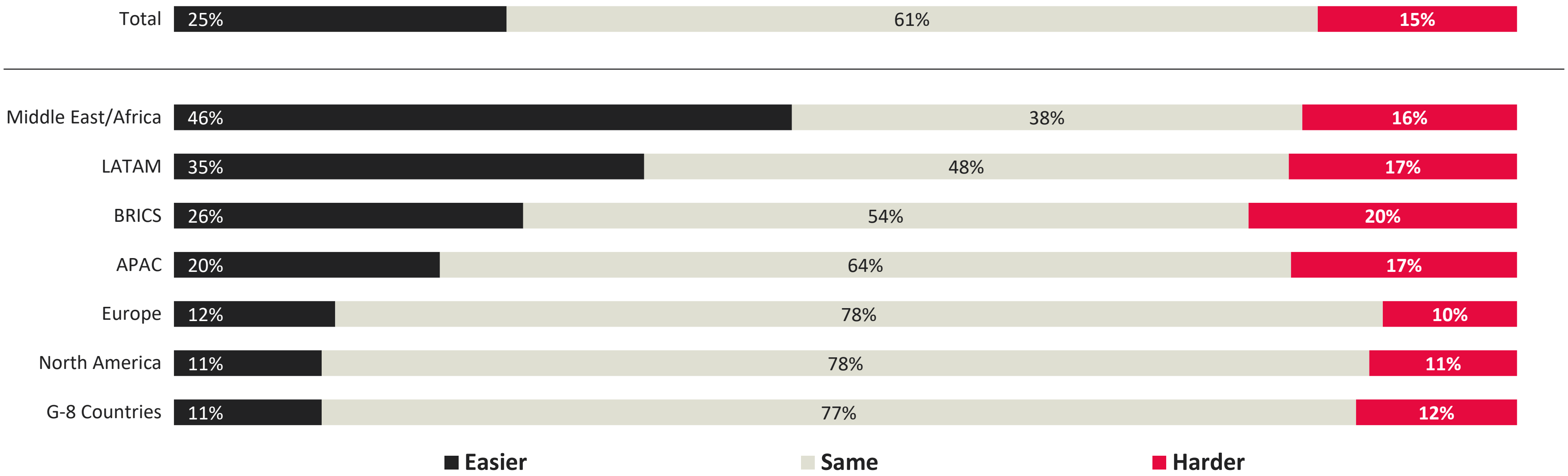
Global citizens are less likely to perceive foreign content as being *easier* to access (-3 pts since 2018 and -11 since 2016).



	TL	AU	BR	CA	CN	EG	FR	DE	GB	HK	IN	ID	IT	JP	KE	MX	NG	PK	PL	KR	RU	ZA	SE	TN	TR	US
2019	25%	9%	27%	13%	21%	41%	12%	9%	9%	20%	33%	34%	13%	6%	56%	43%	60%	58%	17%	17%	17%	33%	13%	27%	28%	8%
2018	28%	12%	44%	13%	19%	44%	18%	11%	8%	28%	42%	42%	20%	10%	65%	41%	52%	55%	31%	20%	16%	40%	18%	37%	31%	12%
2017	28%	11%	40%	13%	18%	46%	14%	10%	n/a	21%	37%	39%	20%	n/a	62%	37%	47%	53%	21%	18%	14%	36%	16%	28%	24%	11%
2016	36%	9%	39%	11%	14%	45%	15%	n/a	n/a	25%	44%	39%	23%	n/a	70%	36%	49%	71%	20%	18%	15%	34%	13%	28%	21%	9%

Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet: [Access foreign content and web sites]
Base: All Respondents Total (n=24,235); 2019 (n=25,229)

Citizens in the Middle East & Africa are over four times more likely, compared to those in Europe, North America & the G-8 to think that it is *easier* to access foreign content & websites, compared to a year ago. This is perhaps not surprising, given growing internet penetration rates in those markets.

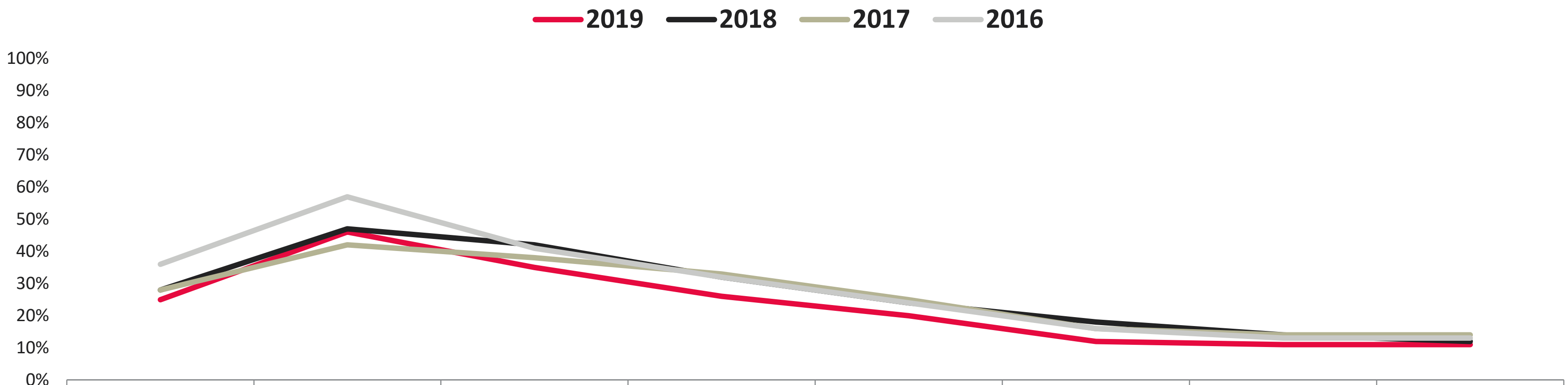


Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet: [Access foreign content and web sites]
Base: All Respondents Total 2019 (n=25,229) Total may not sum to 100% as DK/Refuse not shown

Total may not sum to 100% as DK/Refuse not shown

Across all regions, scores are down (-3 since 2018, -11 since 2016), with the most substantial drops since las tyear occurring in LATAM (-7 pts), BRICS (-6) & Europe (-6). This is due to more citizens feeling as though ease of access is about the *same*.

Tracking – EASIER

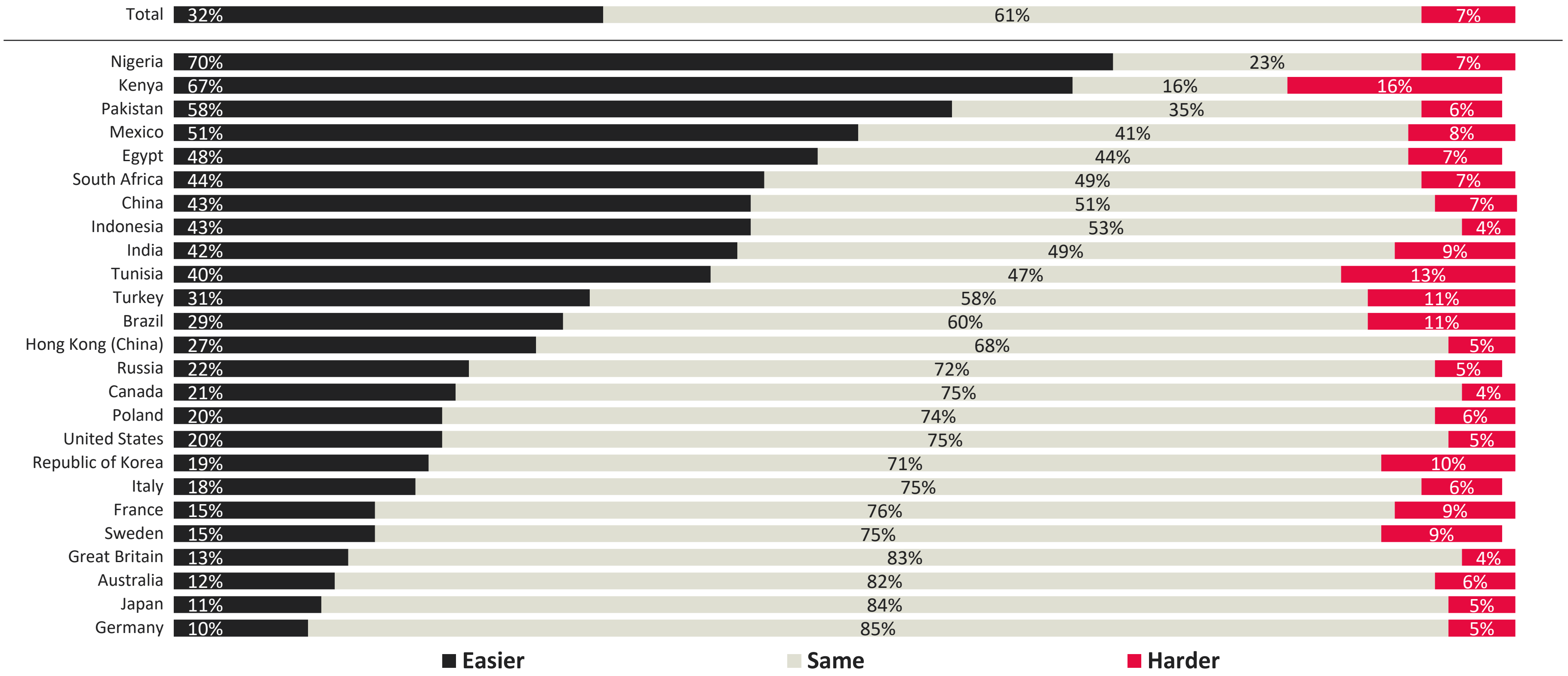


	Total	Middle East/Africa	LATAM	BRICS	APAC	Europe	G-8 Countries	North America
2019	25%	46%	35%	26%	20%	12%	11%	11%
2018	28%	47%	42%	32%	24%	18%	14%	12%
2017	28%	42%	38%	33%	25%	16%	14%	14%
2016	36%	57%	41%	32%	24%	16%	13%	13%

Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet: [Access foreign content and web sites]
Base: All Respondents Total 2018 (n=24,235); 2019 (n=25,229)

ACCESS LOCAL CONTENT AND WEB SITES

Well over nine in ten (93%) global citizens think that it is *easier* (32%) or about *as easy* (61%) to access local content online, compared to a year ago.

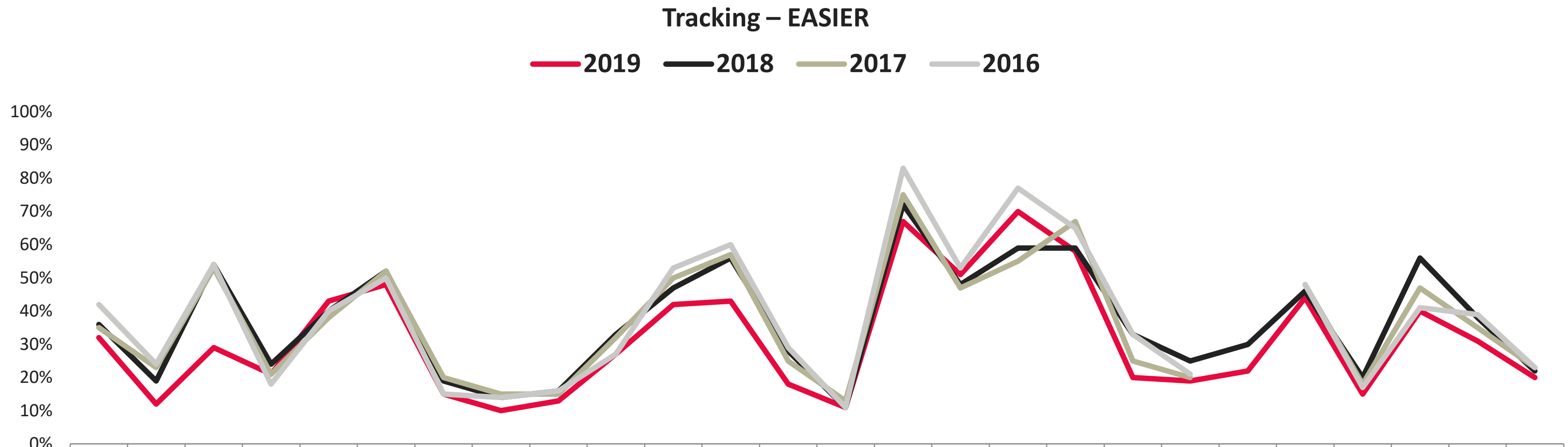


Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet: [Access local content and web sites]
Base: All Respondents Total 2019 (n=25,229) Total may not sum to 100% as DK/Refuse not shown

Total may not sum to 100% as DK/Refuse not shown

ACCESS LOCAL CONTENT AND WEB SITES

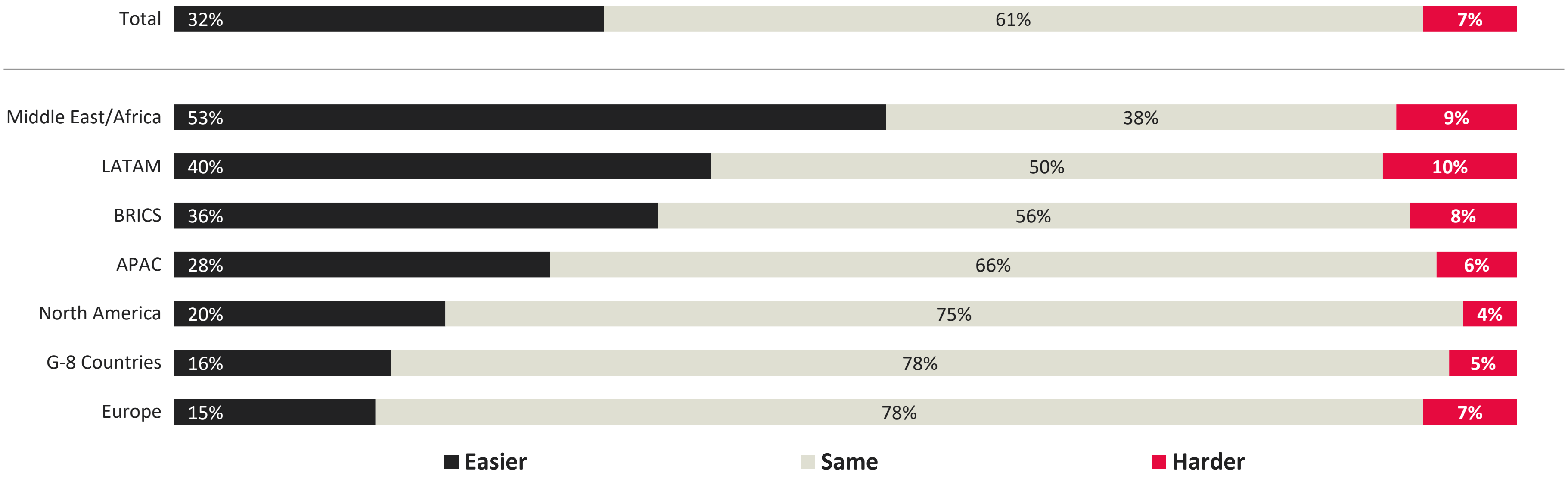
There has been a drop since last year (-4 pts) in the share of global citizens who think that local content has become *easier* to access (-10 since 2016), with the steepest wave-over-wave decline occurring in Brazil (-25 pts). This is again, not surprising, as more now rate access as being about the *same*.



	TL	AU	BR	CA	CN	EG	FR	DE	GB	HK	IN	ID	IT	JP	KE	MX	NG	PK	PL	KR	RU	ZA	SE	TN	TR	US
2019	32%	12%	29%	21%	43%	48%	15%	10%	13%	27%	42%	43%	18%	11%	67%	51%	70%	58%	20%	19%	22%	44%	15%	40%	31%	20%
2018	36%	19%	54%	24%	40%	52%	19%	14%	16%	33%	47%	56%	28%	11%	72%	48%	59%	59%	33%	25%	30%	46%	20%	56%	38%	22%
2017	35%	23%	53%	21%	38%	52%	20%	15%	15%	32%	50%	57%	25%	13%	75%	47%	55%	67%	25%	20%	n/a	48%	18%	47%	35%	23%
2016	42%	24%	54%	18%	40%	50%	15%	14%	16%	27%	53%	60%	29%	11%	83%	53%	77%	65%	33%	21%	n/a	48%	17%	41%	39%	23%

Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet: [Access local content and web sites]
Base: All Respondents Total (n=24,235); 2019 (n=25,229)

Regardless of economy, few think that access to local content & web sites has become more restrictive, over the past year.

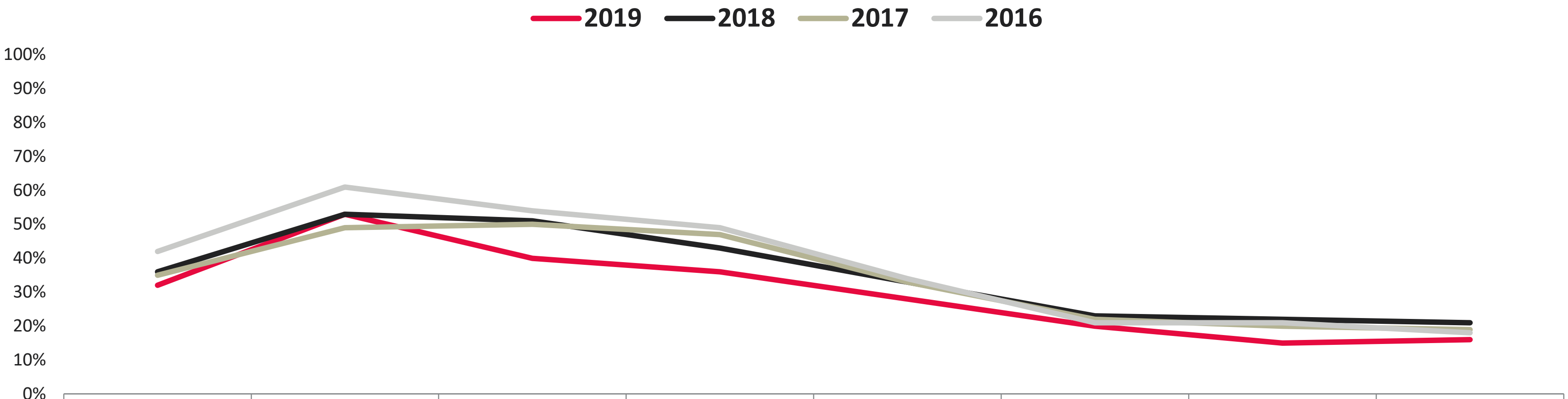


Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet: [Access local content and web sites]
Base: All Respondents Total 2019 (n=25,229) Total may not sum to 100% as DK/Refuse not shown

Total may not sum to 100% as DK/Refuse not shown

Scores are lower across the board, with LATAM registering the largest drop (-11 pts), wave-over-wave. Again, this has more to do with ease of access stagnating than a perception that it has become more difficult.

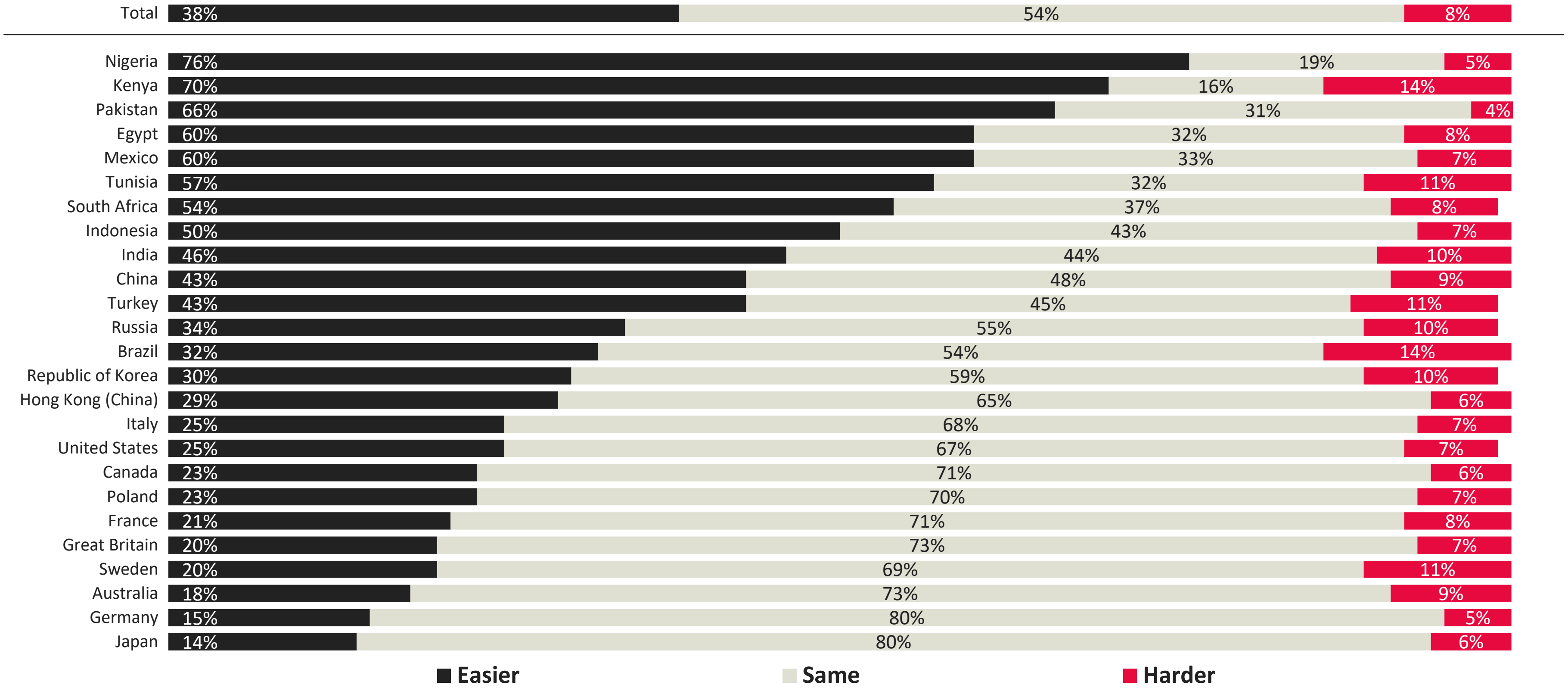
Tracking – EASIER



	Total	Middle East/Africa	LATAM	BRICS	APAC	North America	Europe	G-8 Countries
2019	32%	53%	40%	36%	28%	20%	15%	16%
2018	36%	53%	51%	43%	33%	23%	22%	21%
2017	35%	49%	50%	47%	33%	22%	20%	19%
2016	42%	61%	54%	49%	34%	21%	21%	18%

Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet: [Access local content and web sites]
Base: All Respondents Total 2018 (n=24,235); 2019 (n=25,229)

Well over nine in ten (92%) global citizens think it is as easy (54%) or *easier* (38%) to find the content they seek, compared to a year ago. Regardless of economy, few perceive this as being *harder* to do, than in 2018.



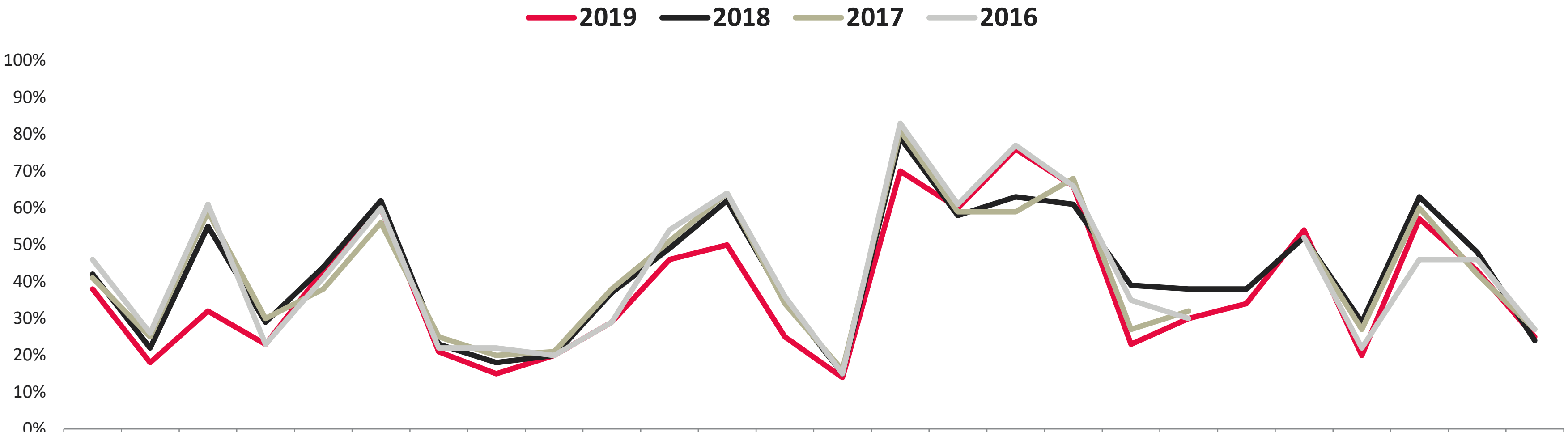
Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet: [Find the content you seek]
Base: All Respondents Total 2019 (n=25,229) Total may not sum to 100% as DK/Refuse not shown

Total may not sum to 100% as DK/Refuse not shown

FIND THE CONTENT YOU SEEK

Overall, global citizens are less likely to indicate that it is easier to find the content they seek (-4 since 2018, -8 since 2016), compared to the previous wave, as more now rate it about the *same*, a figure which is consistent with recent trends.

Tracking – EASIER

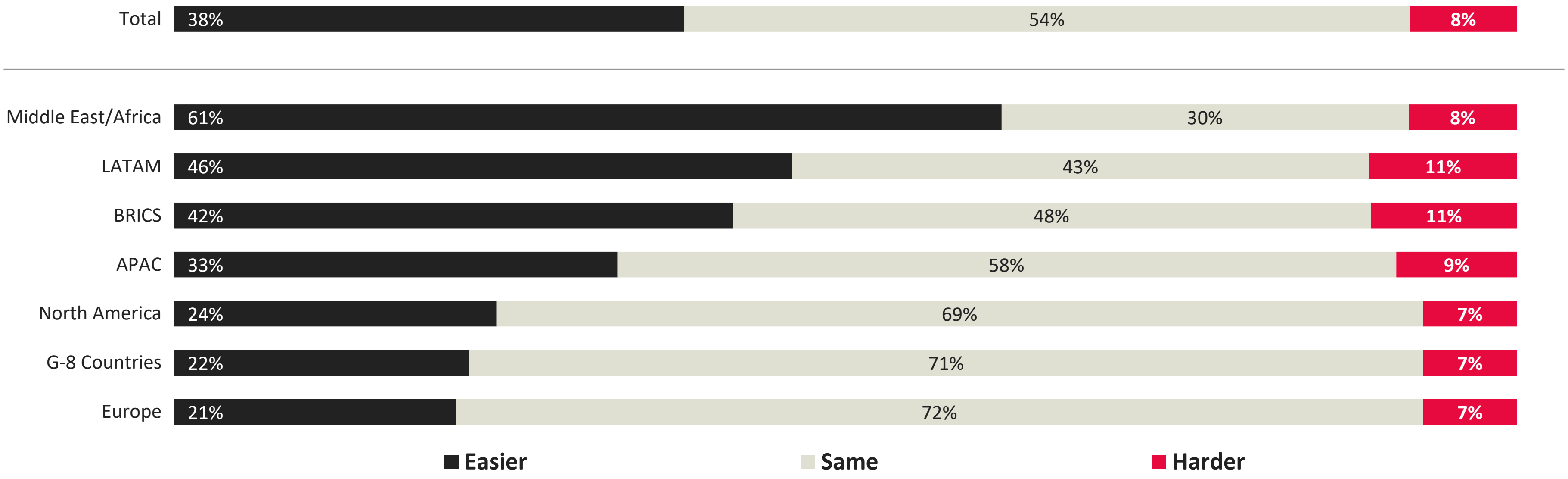


	TL	AU	BR	CA	CN	EG	FR	DE	GB	HK	IN	ID	IT	JP	KE	MX	NG	PK	PL	KR	RU	ZA	SE	TN	TR	US
2019	38%	18%	32%	23%	43%	60%	21%	15%	20%	29%	46%	50%	25%	14%	70%	60%	76%	66%	23%	30%	34%	54%	20%	57%	43%	25%
2018	42%	22%	55%	29%	44%	62%	23%	18%	20%	37%	49%	62%	35%	15%	79%	58%	63%	61%	39%	38%	38%	52%	29%	63%	48%	24%
2017	41%	25%	59%	30%	38%	56%	25%	20%	21%	38%	51%	64%	34%	16%	81%	59%	59%	68%	27%	32%	n/a	52%	27%	60%	42%	27%
2016	46%	26%	61%	23%	41%	60%	22%	22%	20%	29%	54%	64%	36%	15%	83%	61%	77%	66%	35%	30%	n/a	52%	22%	46%	46%	27%

Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet: [Find the content you seek]
Base: All Respondents Total (n=24,235); 2019 (n=25,229)

FIND THE CONTENT YOU SEEK

Citizens living in developing economies tend to think that it is *easier* to find the content they seek, compared to a year ago. On the other hand, those living in more developed economies mostly rate this as being unchanged.

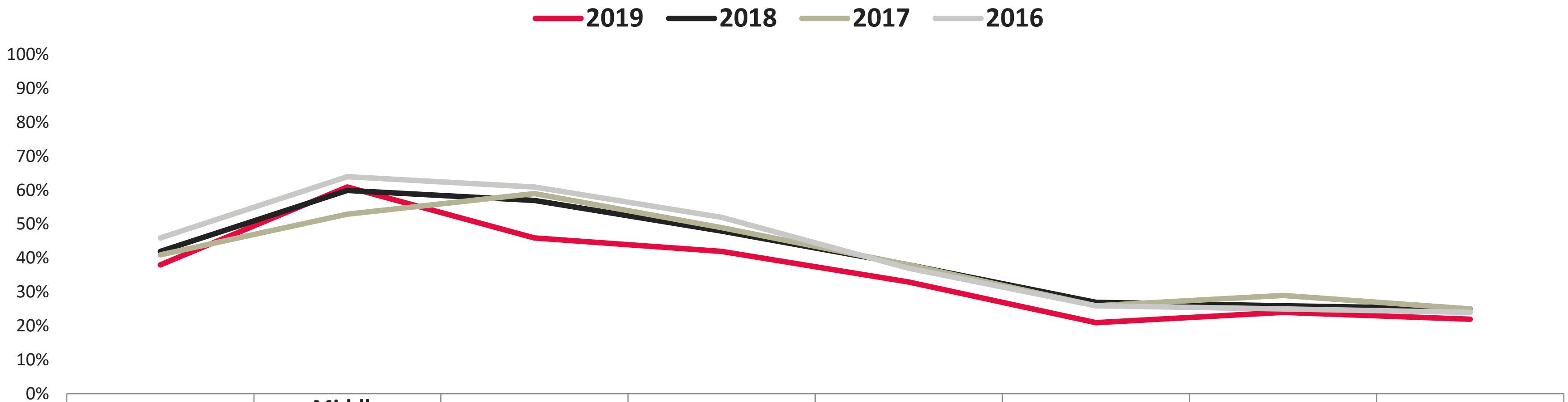


Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet: [Find the content you seek]
Base: All Respondents Total 2019 (n=25,229) Total may not sum to 100% as DK/Refuse not shown

Total may not sum to 100% as DK/Refuse not shown

Overall, a lower proportion of global citizens think that it is easier to find the content they seek, compared to last year's survey (-4 pts). This is because a higher share of global citizens would describe their ease of access as being relatively unchanged, over the past year.

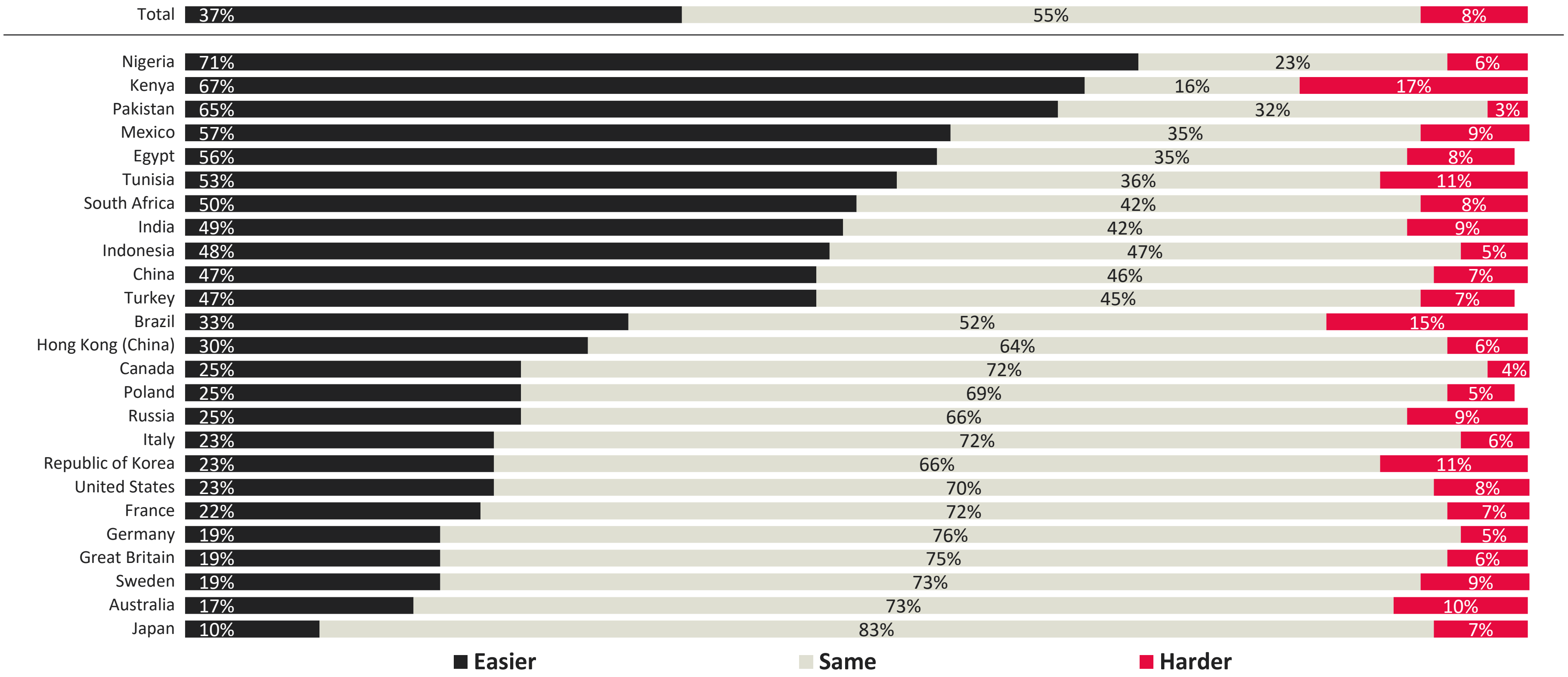
Tracking – EASIER



	Total	Middle East/Africa	LATAM	BRICS	APAC	Europe	North America	G-8 Countries
2019	38%	61%	46%	42%	33%	21%	24%	22%
2018	42%	60%	57%	48%	38%	27%	26%	25%
2017	41%	53%	59%	49%	38%	26%	29%	25%
2016	46%	64%	61%	52%	37%	26%	25%	24%

Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet: [Find the content you seek]
Base: All Respondents Total 2018 (n=24,235); 2019 (n=21,203)

Globally, more than nine in ten (92%) claim that it is *easier* (37%), or about as easy (55%), for them to access websites quickly.

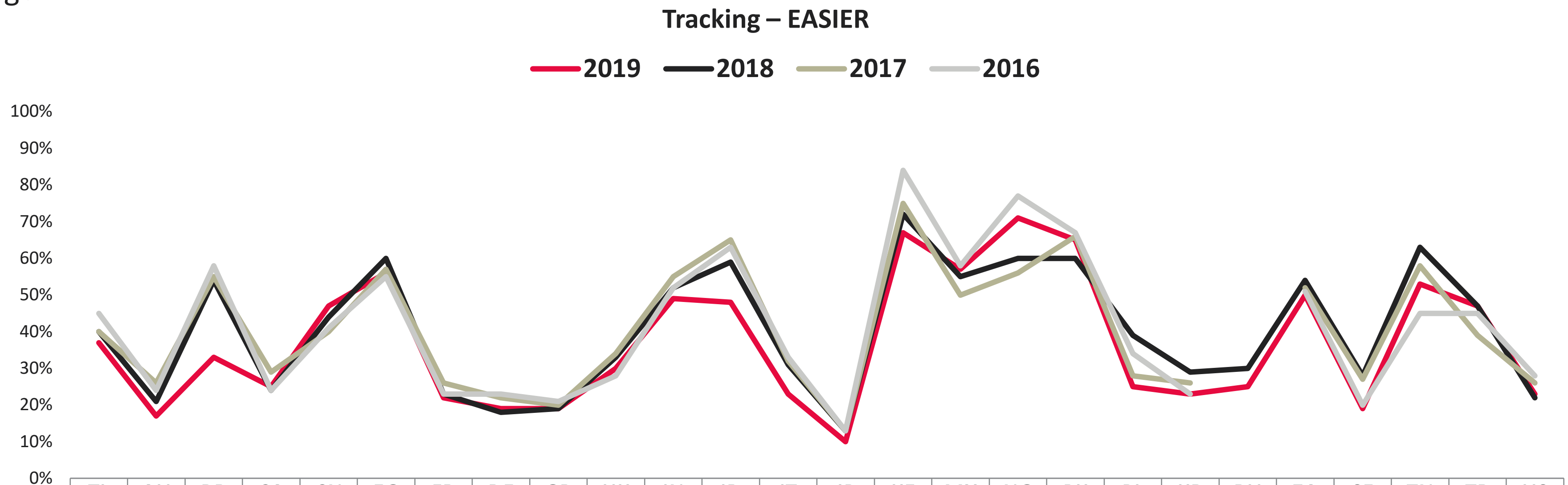


Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet: [Access websites in a quick manner]
Base: All Respondents Total 2019 (n=25,229) Total may not sum to 100% as DK/Refuse not shown

Total may not sum to 100% as DK/Refuse not shown

ACCESS WEBSITES IN A QUICK MANNER

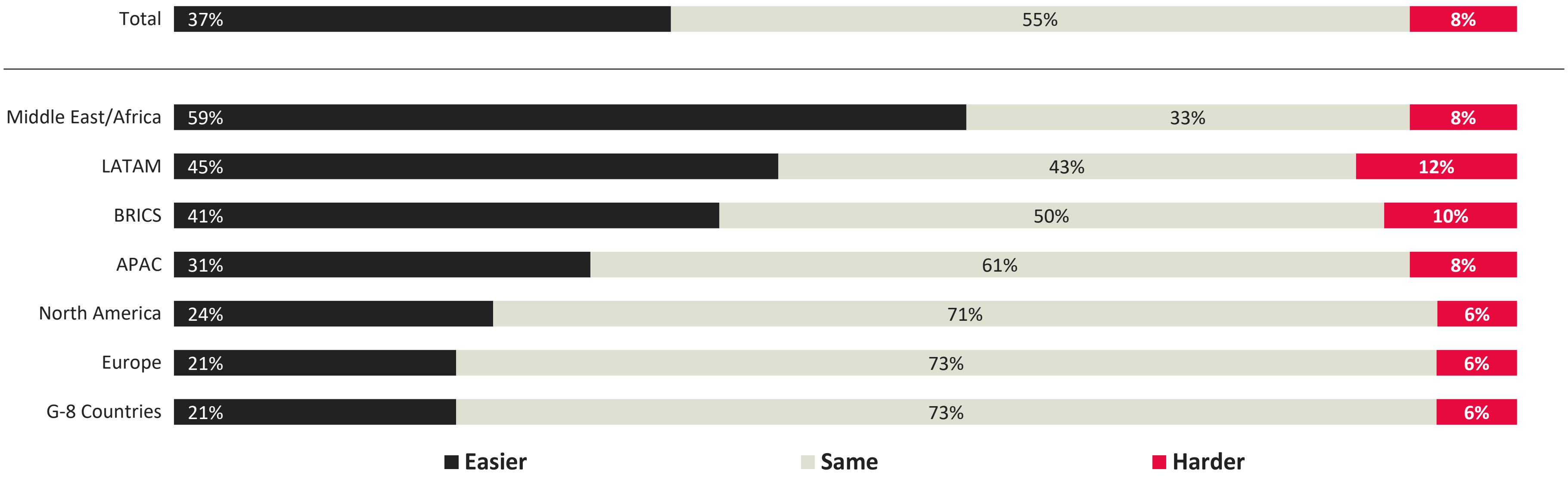
While global citizens are less likely to indicate that it is *easier* to access websites quickly (-3 since 2018, -8 since 2016), this is because more of them would now describe the ease of difficulty being about the *same* as it was, a year ago.



	TL	AU	BR	CA	CN	EG	FR	DE	GB	HK	IN	ID	IT	JP	KE	MX	NG	PK	PL	KR	RU	ZA	SE	TN	TR	US
2019	37%	17%	33%	25%	47%	56%	22%	19%	19%	30%	49%	48%	23%	10%	67%	57%	71%	65%	25%	23%	25%	50%	19%	53%	47%	23%
2018	40%	21%	54%	24%	44%	60%	23%	18%	19%	33%	52%	59%	31%	13%	72%	55%	60%	60%	39%	29%	30%	54%	28%	63%	47%	22%
2017	40%	26%	55%	29%	40%	57%	26%	22%	20%	34%	55%	65%	32%	13%	75%	50%	56%	66%	28%	26%	n/a	52%	27%	58%	39%	26%
2016	45%	24%	58%	24%	41%	55%	23%	23%	21%	28%	52%	63%	33%	13%	84%	58%	77%	67%	34%	23%	n/a	51%	20%	45%	45%	28%

Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet: [Access websites in a quick manner]
Base: All Respondents Total (n=24,235); 2019 (n=25,229)

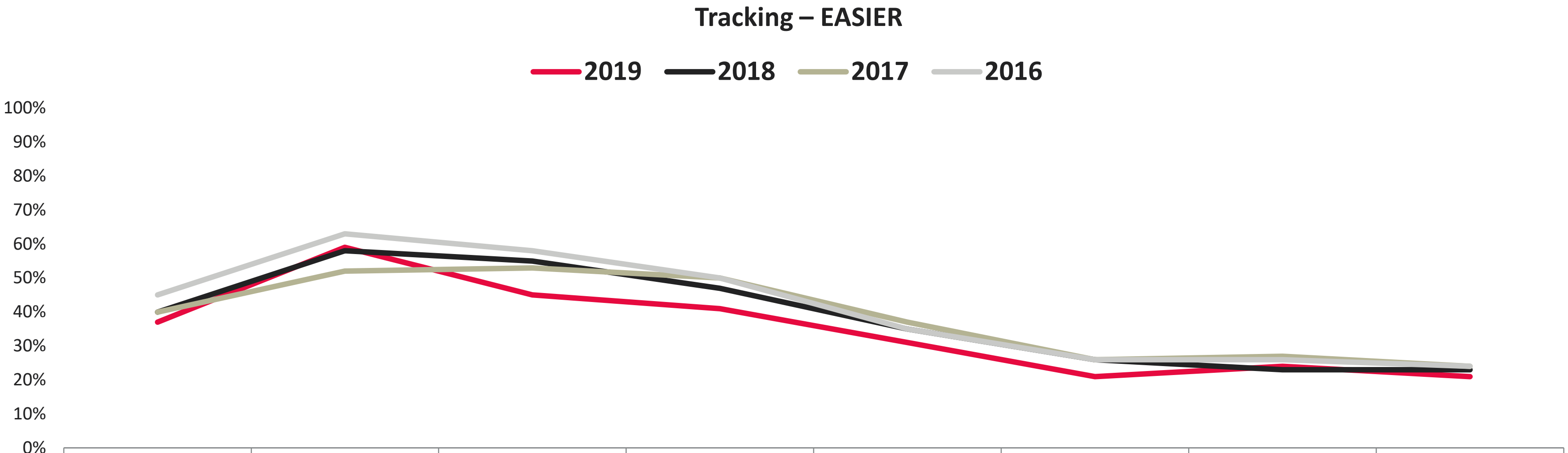
Those living in developing economies, such as the Middle East, Africa & LATAM tend to be among the most likely to think that it has become *easier* to access websites in a quick manner, over the past year.



Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet: [Access websites in a quick manner]
Base: All Respondents Total 2019 (n=25,229) Total may not sum to 100% as DK/Refuse not shown

Total may not sum to 100% as DK/Refuse not shown

The LATAM economies (-10 pts) have registered the greatest wave-over-wave movement in opinion, on this metric.

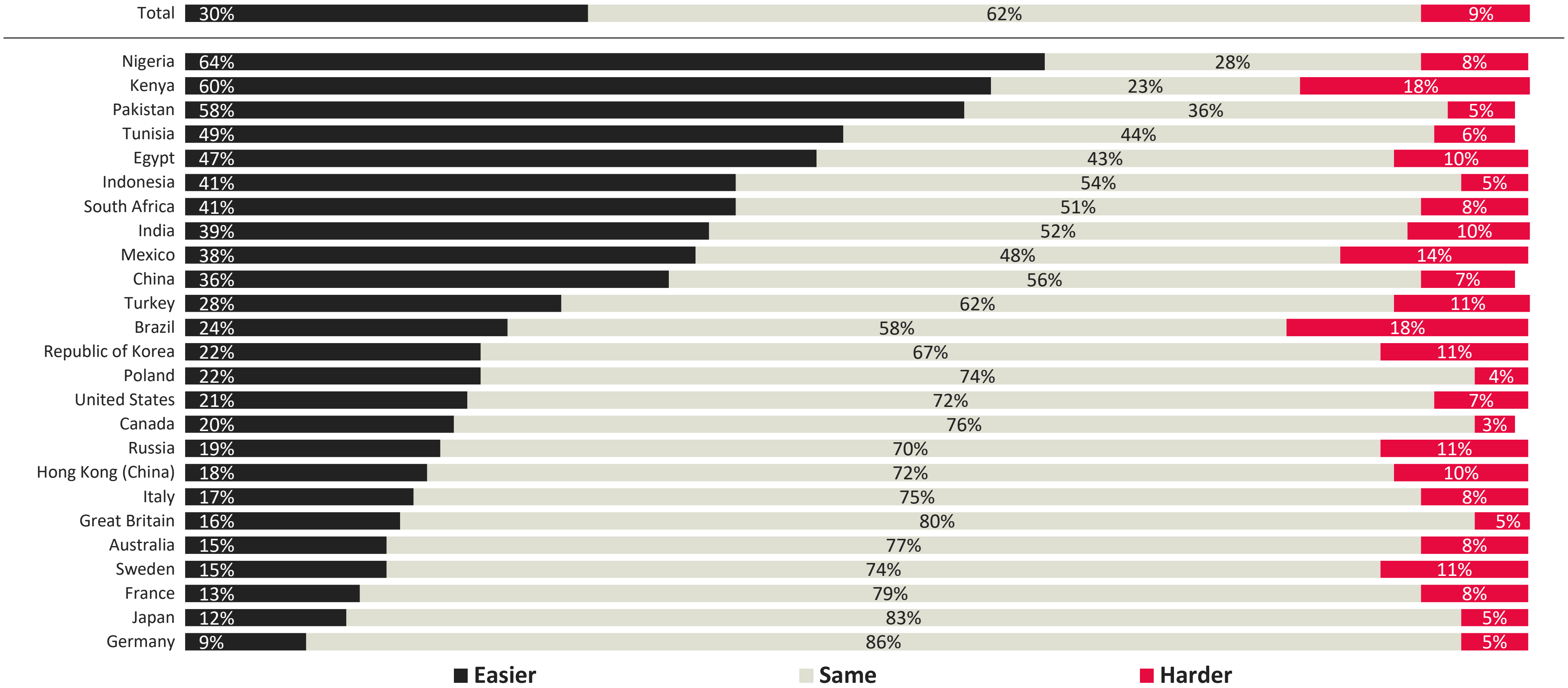


	Total	Middle East/Africa	LATAM	BRICS	APAC	Europe	North America	G-8 Countries
2019	37%	59%	45%	41%	31%	21%	24%	21%
2018	40%	58%	55%	47%	35%	26%	23%	23%
2017	40%	52%	53%	50%	37%	26%	27%	24%
2016	45%	63%	58%	50%	35%	26%	26%	24%

Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet: [Access websites in a quick manner]
Base: All Respondents Total 2018 (n=24,235); 2019 (n=25,229)

RELY ON YOUR FAVORITE WEBSITE TO BE ONLINE AND WORKING

Similarly, around nine in ten (92%) indicate that it is *easier* (30%), or about as easy (62%), for them to rely on their favourite website to be online and working.



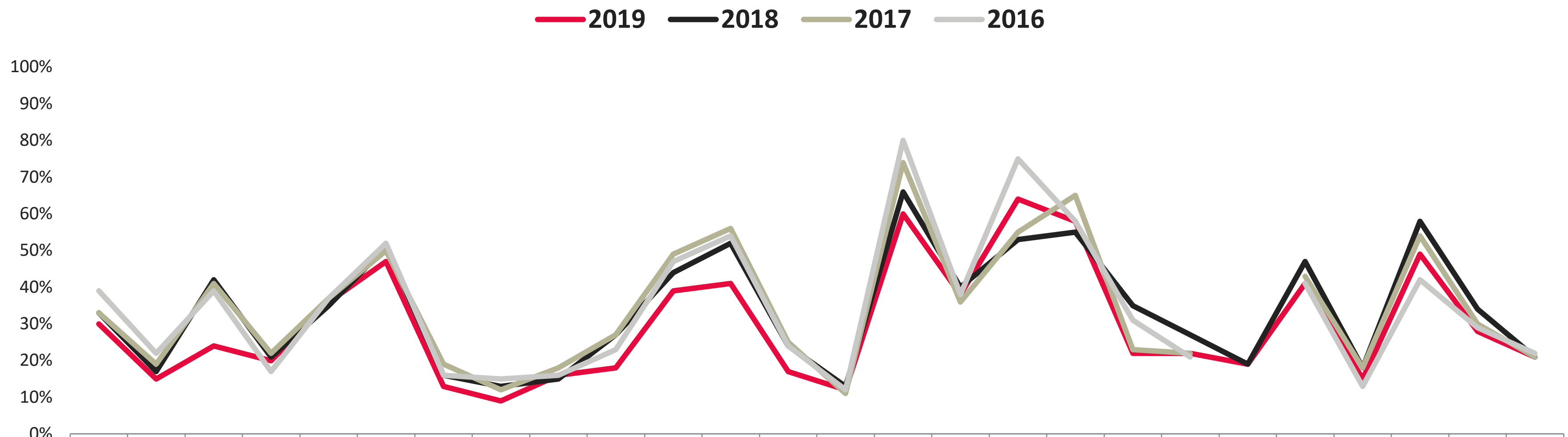
Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet:
[Rely on your favorite website to be online and working] Base: All Respondents Total 2019 (n=25,229) Total may not sum to 100% as DK/Refuse not shown

Total may not sum to 100% as DK/Refuse not shown

RELY ON YOUR FAVORITE WEBSITE TO BE ONLINE AND WORKING

While global citizens are less likely to indicate that it is *easier* to rely on their favourite website (-3 since 2018, -9 since 2016), this is generally because more of them would now describe the ease of difficulty being about the *same* as it was, a year ago. Brazil registers the greatest wave-over-wave shift in opinion, on this metric (-18 pts).

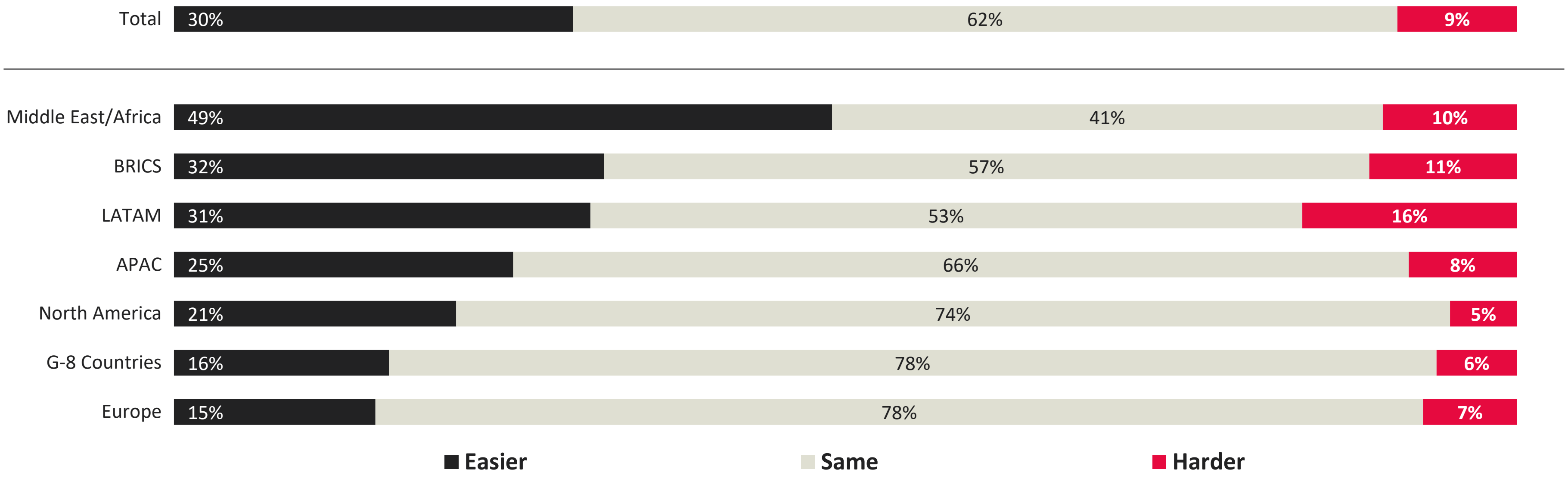
Tracking – EASIER



	TL	AU	BR	CA	CN	EG	FR	DE	GB	HK	IN	ID	IT	JP	KE	MX	NG	PK	PL	KR	RU	ZA	SE	TN	TR	US
2019	30%	15%	24%	20%	36%	47%	13%	9%	16%	18%	39%	41%	17%	12%	60%	38%	64%	58%	22%	22%	19%	41%	15%	49%	28%	21%
2018	33%	17%	42%	21%	35%	51%	16%	13%	15%	27%	44%	52%	24%	13%	66%	40%	53%	55%	35%	27%	19%	47%	18%	58%	34%	21%
2017	33%	19%	41%	22%	37%	50%	19%	12%	18%	27%	49%	56%	25%	11%	74%	36%	55%	65%	23%	22%	n/a	43%	18%	54%	30%	21%
2016	39%	22%	39%	17%	37%	52%	16%	15%	16%	23%	47%	54%	24%	12%	80%	38%	75%	58%	31%	21%	n/a	41%	13%	42%	29%	22%

Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet: [Rely on your favorite website to be online and working] Base: All Respondents Total (n=24,235); 2019 (n=25,229)

Those living in the Middle East & Africa are three times more likely, compared to Europeans & G-8 citizens to claim that it has become *easier*, relative to a year ago, for them to rely on their favourite website to be online & working.



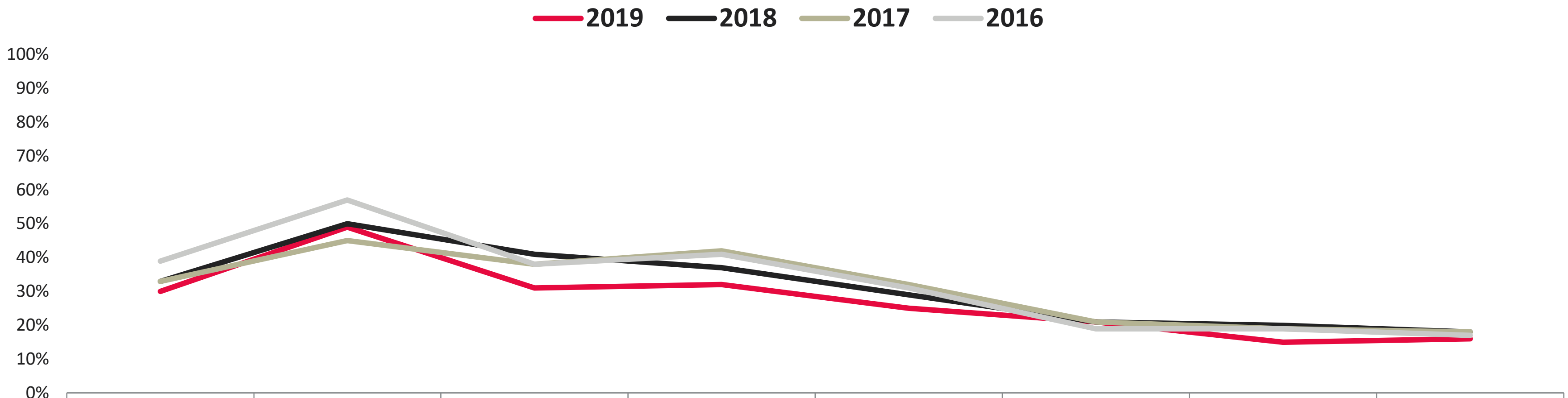
Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet:
[Rely on your favorite website to be online and working] Base: All Respondents Total 2019 (n=25,229) Total may not sum to 100% as DK/Refuse not shown

Total may not sum to 100% as DK/Refuse not shown

RELY ON YOUR FAVORITE WEBSITE TO BE ONLINE AND WORKING

North Americans are no more or less likely to claim that it is *easier* for them to rely on their favourite website to be online and working, compared to a year ago. Scores are down in all other regions versus last year's survey.

Tracking – EASIER

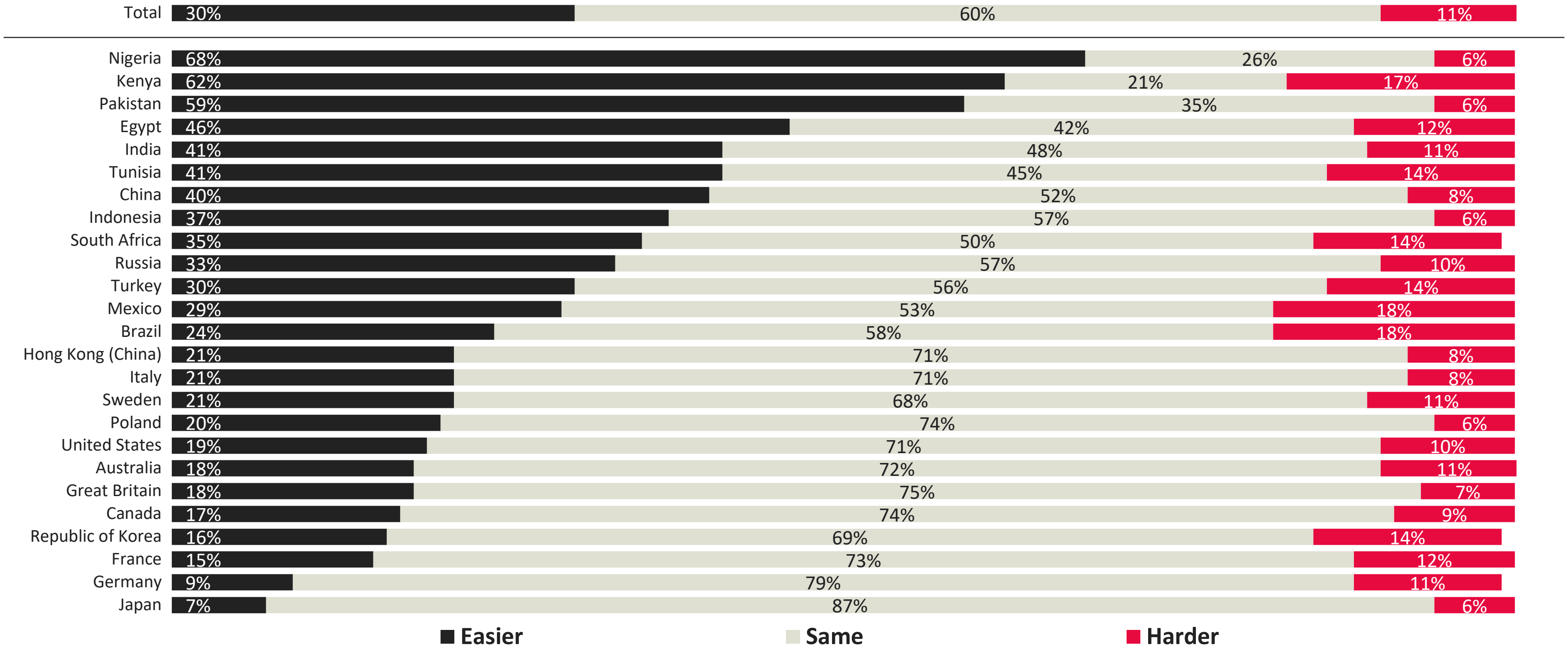


	Total	Middle East/Africa	LATAM	BRICS	APAC	North America	Europe	G-8 Countries
2019	30%	49%	31%	32%	25%	21%	15%	16%
2018	33%	50%	41%	37%	29%	21%	20%	18%
2017	33%	45%	38%	42%	32%	21%	19%	18%
2016	39%	57%	38%	41%	31%	19%	19%	17%

Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet:
[Rely on your favorite website to be online and working] Base: All Respondents Total 2018 (n=24,235); 2019 (n=25,229)

COUNT ON RELIABLE MOBILE INTERNET SERVICE

Nine in ten (90%) global citizens say that it is *easier* for them to count on reliable mobile Internet service. Germany stands out as the only economy in which a higher proportion of its citizens feel as though this has actually become *harder* (11%) as opposed to *easier* (9%), over the past year.



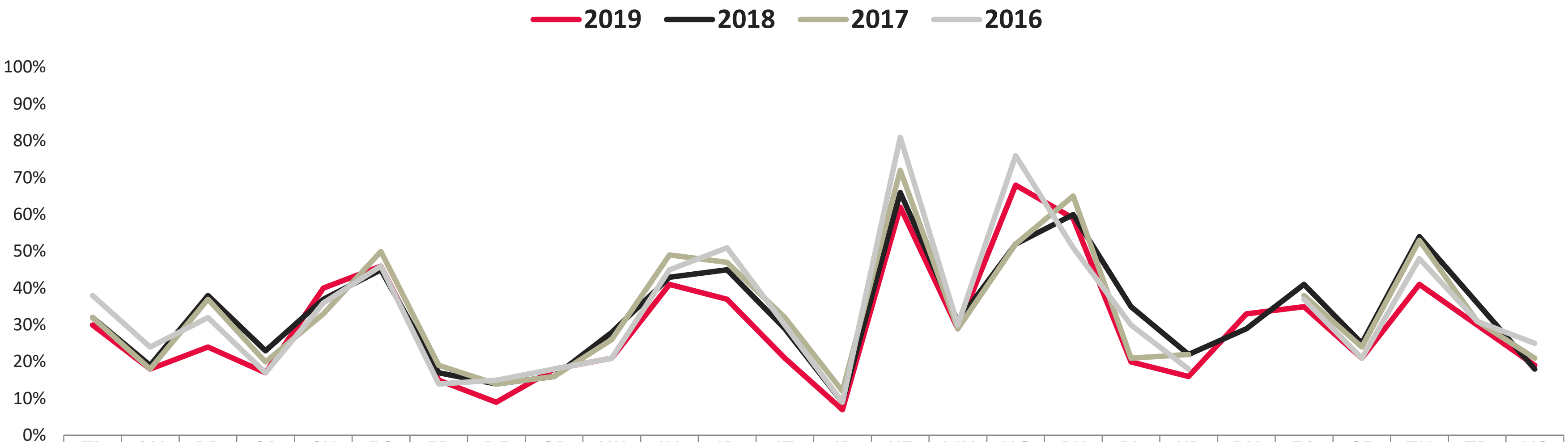
Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet:
[Count on reliable mobile Internet service] Base: All Respondents Total 2019 (n=25,229) Total may not sum to 100% as DK/Refuse not shown

Total may not sum to 100% as DK/Refuse not shown

COUNT ON RELIABLE MOBILE INTERNET SERVICE

While global citizens are less likely to indicate that it is *easier* to rely on mobile Internet service (-2 since 2018, -8 since 2016), this is generally because more of them would now describe the ease of difficulty being about the *same* as it was, a year ago.

Tracking – EASIER

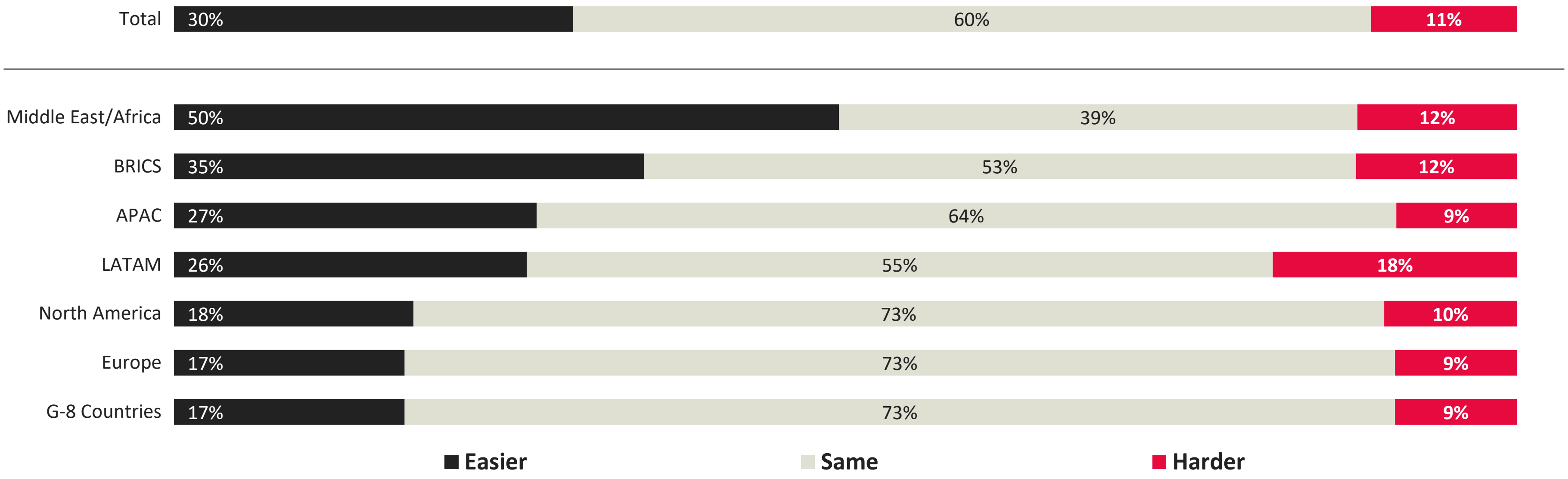


	TL	AU	BR	CA	CN	EG	FR	DE	GB	HK	IN	ID	IT	JP	KE	MX	NG	PK	PL	KR	RU	ZA	SE	TN	TR	US
2019	30%	18%	24%	17%	40%	46%	15%	9%	18%	21%	41%	37%	21%	7%	62%	29%	68%	59%	20%	16%	33%	35%	21%	41%	30%	19%
2018	32%	19%	38%	23%	37%	45%	17%	14%	16%	28%	43%	45%	29%	9%	66%	31%	52%	60%	35%	22%	29%	41%	25%	54%	36%	18%
2017	32%	18%	37%	20%	33%	50%	19%	14%	16%	26%	49%	47%	32%	12%	72%	29%	52%	65%	21%	22%	n/a	38%	24%	53%	31%	21%
2016	38%	24%	32%	17%	36%	46%	14%	15%	18%	21%	45%	51%	30%	9%	81%	30%	76%	51%	30%	18%	n/a	37%	21%	48%	31%	25%

Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet:
[Count on reliable mobile Internet service] Base: All Respondents Total (n=24,235); 2019 (n=25,229)

COUNT ON RELIABLE MOBILE INTERNET SERVICE

Those living in the Middle East & Africa are nearly three times more likely, compared to Europeans, North Americans & G-8 citizens to claim that it has become *easier*, relative to a year ago, for them to count on reliable mobile Internet service.



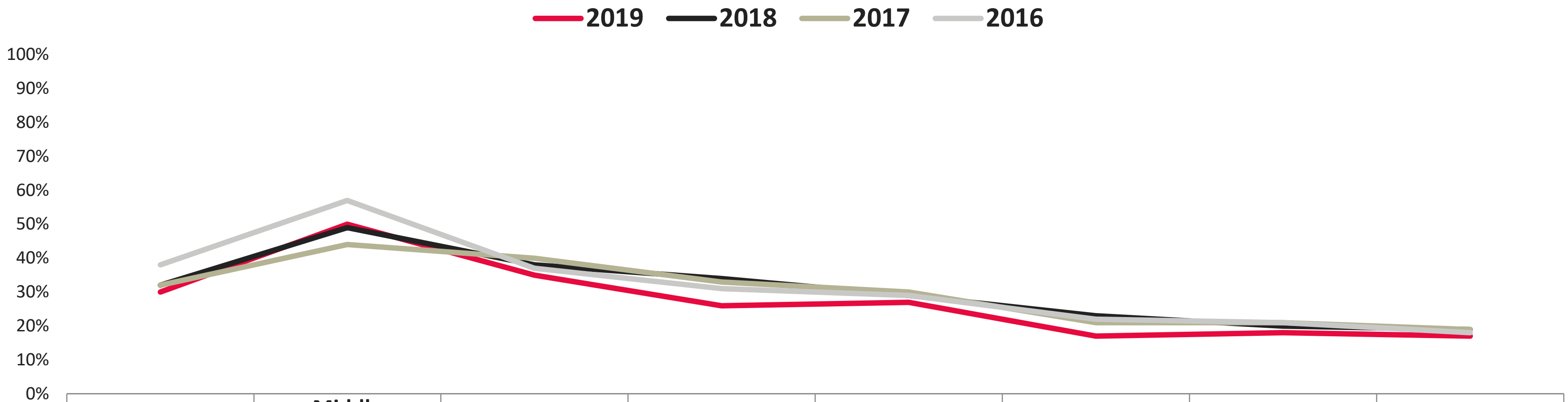
Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet:
[Count on reliable mobile Internet service] Base: All Respondents Total 2019 (n=25,229) Total may not sum to 100% as DK/Refuse not shown

Total may not sum to 100% as DK/Refuse not shown

COUNT ON RELIABLE MOBILE INTERNET SERVICE

Overall, a lower proportion of global citizens feel that it is easier to count on reliable Internet service, compared to last year (-2 pts), and down 9 points since 2019. This is because a higher share of global citizens would describe their ease of access as being relatively unchanged, over the past year.

Tracking – EASIER

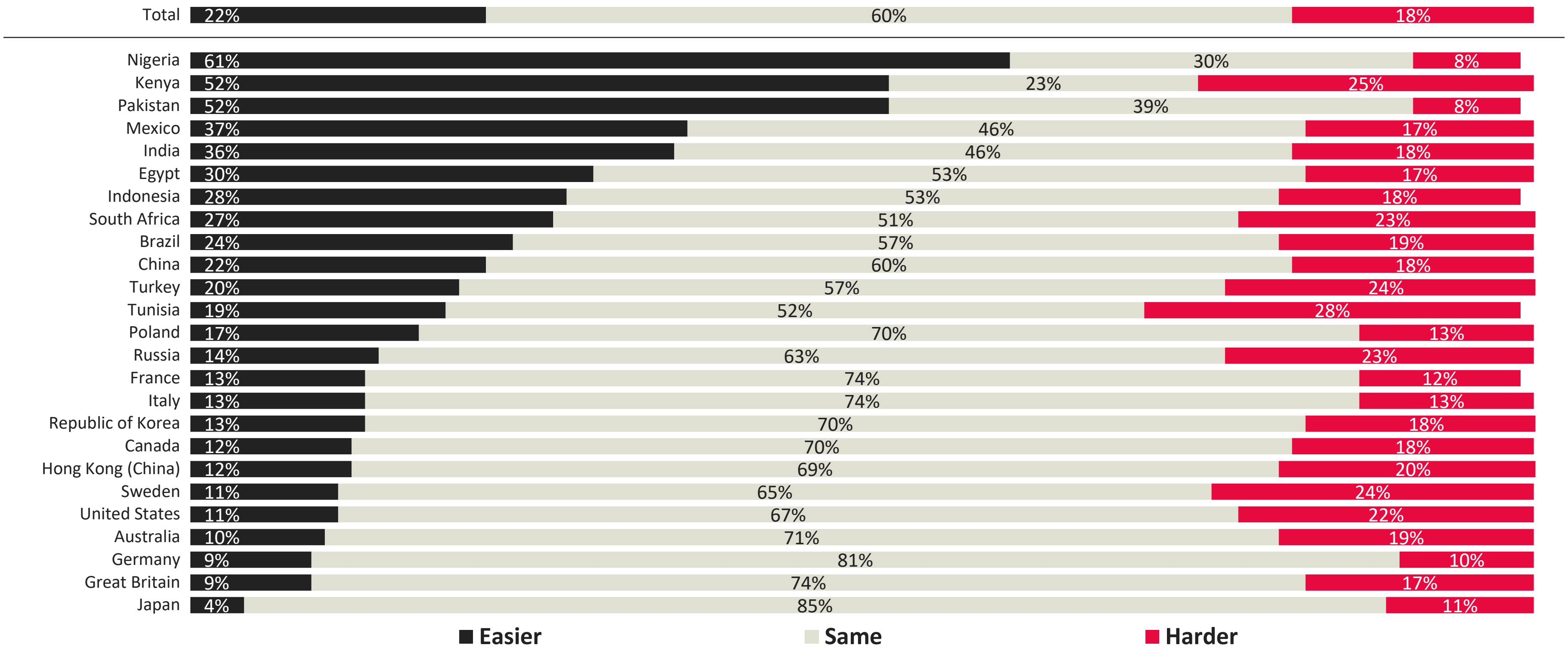


	Total	Middle East/Africa	BRICS	LATAM	APAC	Europe	North America	G-8 Countries
2019	30%	50%	35%	26%	27%	17%	18%	17%
2018	32%	49%	38%	34%	29%	23%	20%	19%
2017	32%	44%	40%	33%	30%	21%	21%	19%
2016	38%	57%	37%	31%	29%	22%	21%	18%

Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet:
[Count on reliable mobile Internet service] Base: All Respondents Total 2018 (n=24,235); 2019 (n=25,229)

SURF THE INTERNET WITH THE KNOWLEDGE THAT CONTENT IS NOT BEING CENSORED

Just 22% say it's becoming easier to surf the net with the knowledge that content is not being censored. This compares to a similar proportion (18%) who say it's actually getting harder, particularly in places like Tunisia (28%), Russia (23%), Sweden (24%) and the United States (22%).

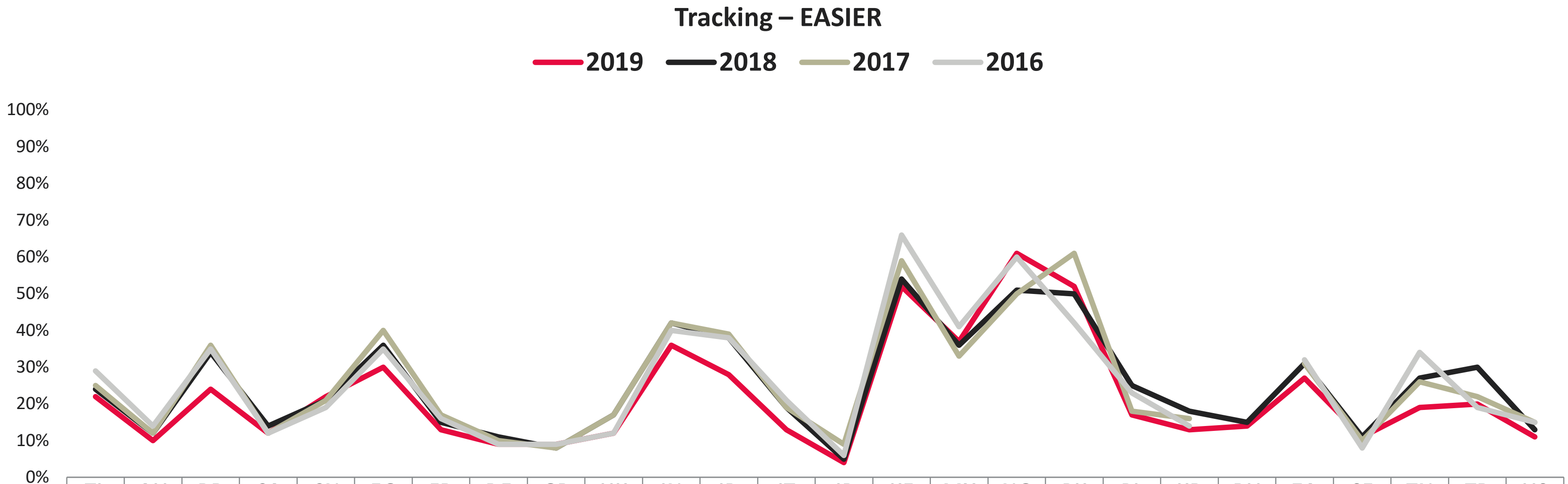


Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet: [Surf the internet with the knowledge that content is not being censored]
Base: All Respondents Total 2019 (n=25,229) Total may not sum to 100% as DK/Refuse not shown

Total may not sum to 100% as DK/Refuse not shown

SURF THE INTERNET WITH THE KNOWLEDGE THAT CONTENT IS NOT BEING CENSORED

The greatest year-over-year shifts in opinion have occurred in Nigeria (+10 pts), Indonesia (-10), Brazil (-10), Pakistan (-10) & Turkey (-10).

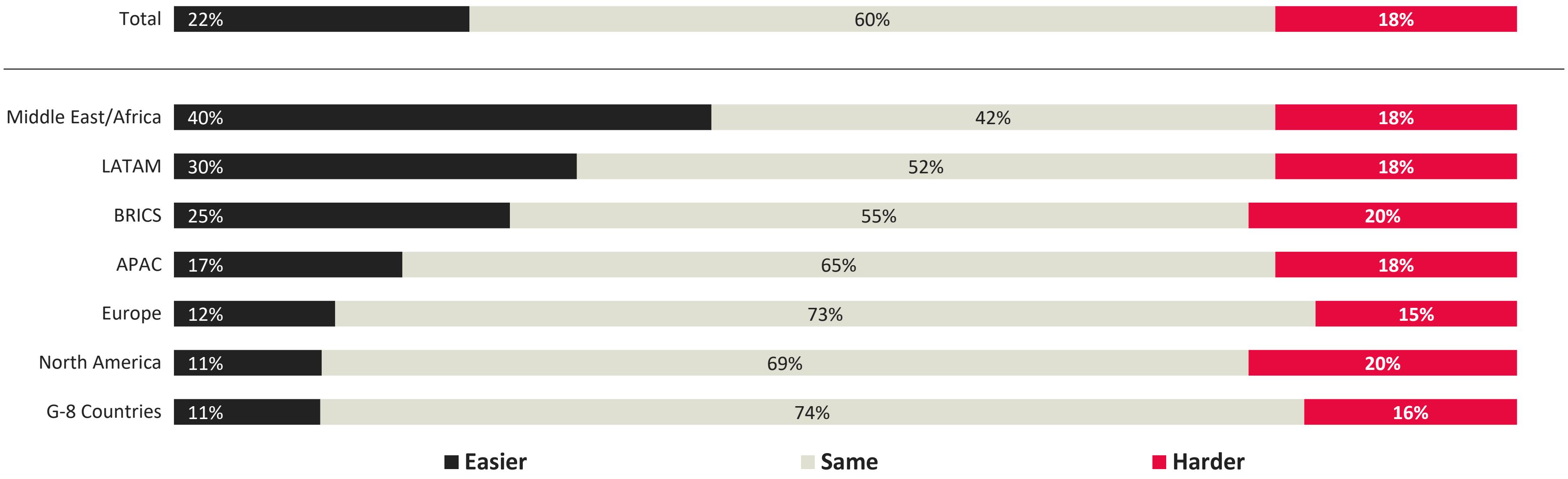


	TL	AU	BR	CA	CN	EG	FR	DE	GB	HK	IN	ID	IT	JP	KE	MX	NG	PK	PL	KR	RU	ZA	SE	TN	TR	US
2019	22%	10%	24%	12%	22%	30%	13%	9%	9%	12%	36%	28%	13%	4%	52%	37%	61%	52%	17%	13%	14%	27%	11%	19%	20%	11%
2018	24%	12%	34%	14%	21%	36%	15%	11%	8%	17%	42%	38%	19%	5%	54%	36%	51%	50%	25%	18%	15%	31%	11%	27%	30%	13%
2017	25%	12%	36%	12%	21%	40%	17%	10%	8%	17%	42%	39%	19%	9%	59%	33%	50%	61%	18%	16%	n/a	31%	10%	26%	22%	15%
2016	29%	14%	35%	12%	19%	35%	16%	9%	9%	12%	40%	38%	21%	6%	66%	41%	60%	42%	23%	14%	n/a	32%	8%	34%	19%	15%

Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet:
[Surf the internet with the knowledge that content is not being censored] Base: All Respondents Total (n=24,235); 2019 (n=25,229)

SURF THE INTERNET WITH THE KNOWLEDGE THAT CONTENT IS NOT BEING CENSORED

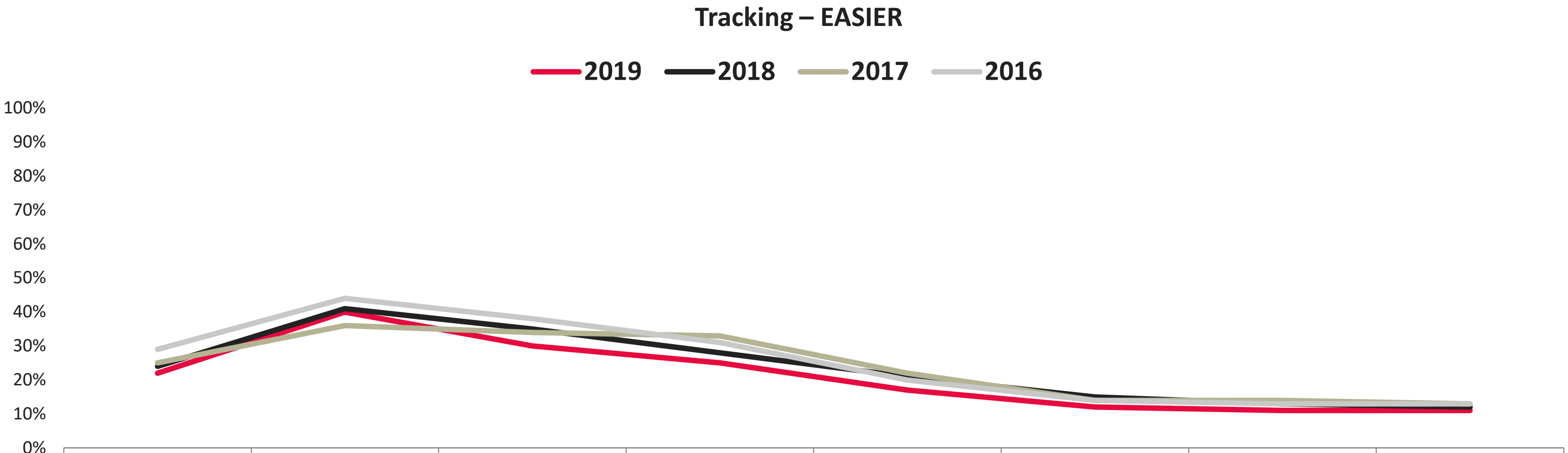
A greater proportion of citizens in more developed economies, such as Europe, North America, APAC & the G-8 Countries actually think that it has become *harder*, as opposed to *easier*, to surf the Internet with knowledge that content is not being censored.



Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet:
[Surf the internet with the knowledge that content is not being censored]
Base: All Respondents Total 2019 (n=25,229) Total may not sum to 100% as DK/Refuse not shown

Total may not sum to 100% as DK/Refuse not shown

In every region, a lower proportion of citizens think that it has become *easier* to surf the Internet with knowledge that content is not being censored, compared to the 2018 survey.

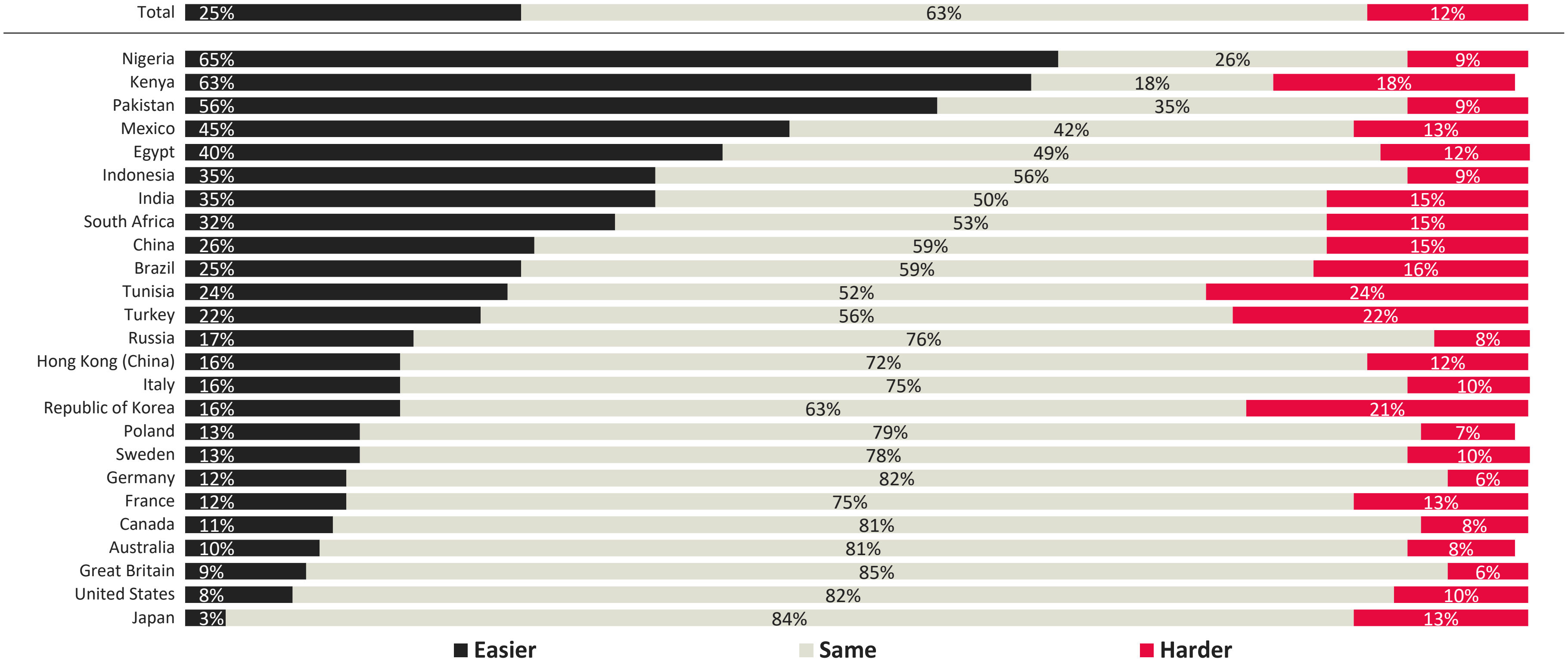


	Total	Middle East/Africa	LATAM	BRICS	APAC	Europe	North America	G-8 Countries
2019	22%	40%	30%	25%	17%	12%	11%	11%
2018	24%	41%	35%	28%	21%	15%	13%	12%
2017	25%	36%	34%	33%	22%	14%	14%	13%
2016	29%	44%	38%	31%	20%	14%	13%	13%

Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet:
[Surf the internet with the knowledge that content is not being censored] Base: All Respondents Total 2018 (n=24,235); 2019 (n=25,229)

SENDING OR RECEIVING EMAILS TO OR FROM FOREIGN ADDRESSES

A higher proportion of American, Korean, French & Japanese citizens think it has become *harder*, rather than *easier*, to send or receive emails to or from foreign addresses.



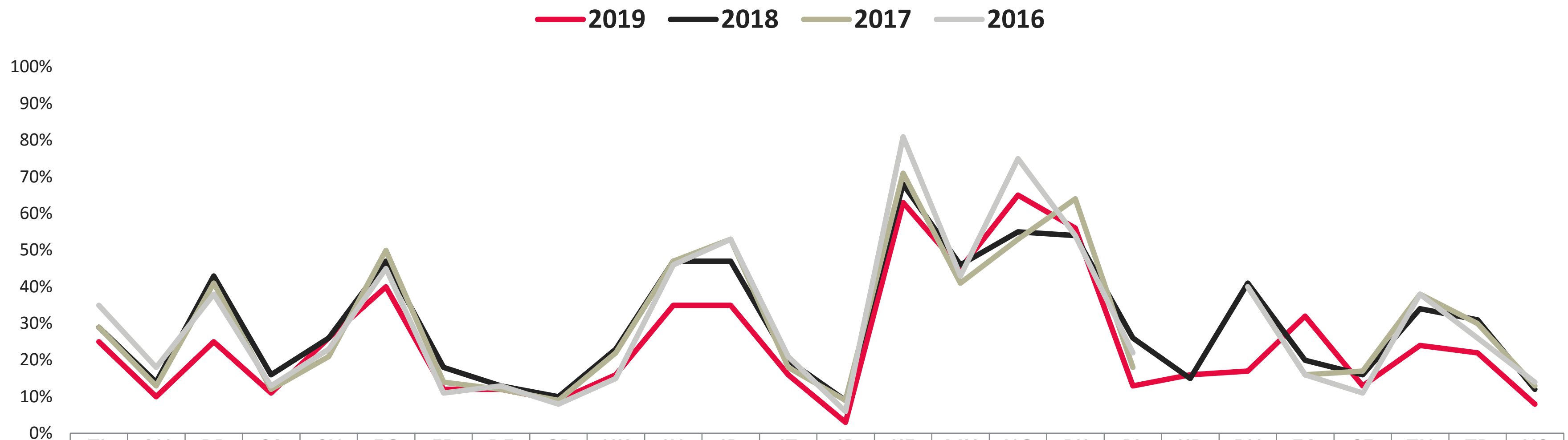
Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet: [Sending or receiving emails to or from foreign addresses]
Base: All Respondents Total 2019 (n=25,229) Total may not sum to 100% as DK/Refuse not shown

Total may not sum to 100% as DK/Refuse not shown

SENDING OR RECEIVING EMAILS TO OR FROM FOREIGN ADDRESSES

With the exception of South Africa (+12 pts), Pakistan (+2) the Republic of Korea (+1) & China (unchanged), a lower proportion feel that it is *easier* to send or receive emails to or from foreign addresses, relative to the 2018 survey. Changes since 2016 are more pronounced, overall.

Tracking – EASIER

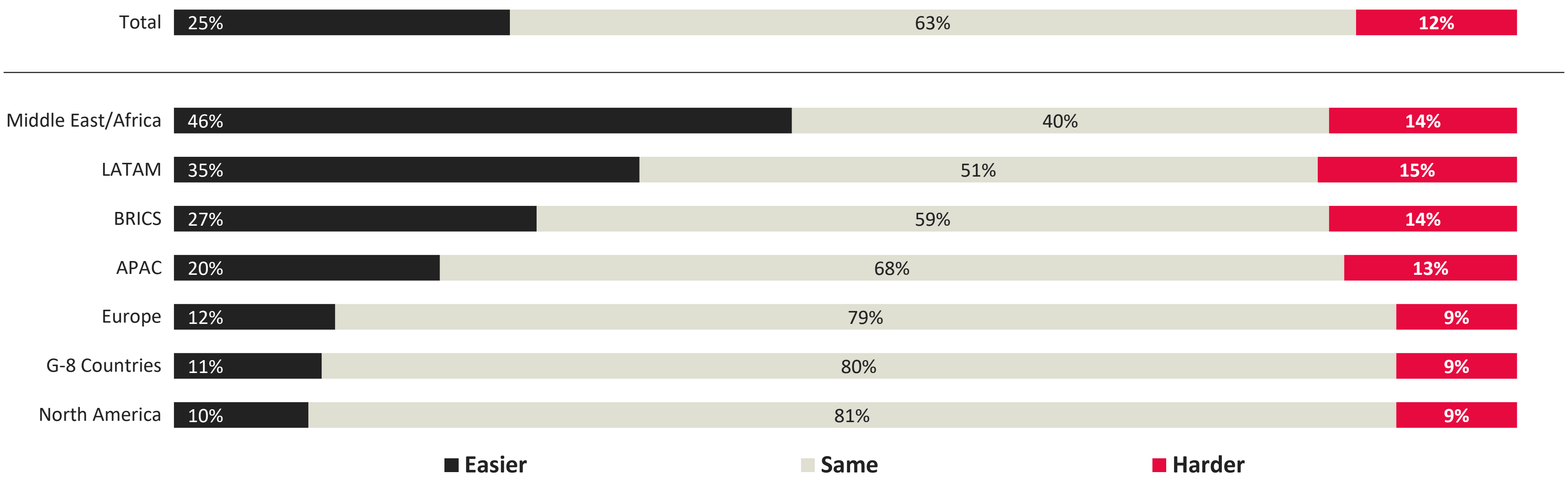


	TL	AU	BR	CA	CN	EG	FR	DE	GB	HK	IN	ID	IT	JP	KE	MX	NG	PK	PL	KR	RU	ZA	SE	TN	TR	US
2019	25%	10%	25%	11%	26%	40%	12%	12%	9%	16%	35%	35%	16%	3%	63%	45%	65%	56%	13%	16%	17%	32%	13%	24%	22%	8%
2018	29%	14%	43%	16%	26%	47%	18%	13%	10%	23%	47%	47%	20%	9%	68%	46%	55%	54%	26%	15%	41%	20%	16%	34%	31%	12%
2017	29%	13%	41%	12%	21%	50%	14%	12%	9%	22%	47%	53%	18%	9%	71%	41%	53%	64%	18%	n/a	40%	16%	17%	38%	30%	13%
2016	35%	18%	38%	13%	23%	45%	11%	13%	8%	15%	46%	53%	21%	6%	81%	43%	75%	54%	22%	n/a	40%	16%	11%	38%	26%	14%

Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet:
[Sending or receiving emails to or from foreign addresses] Base: All Respondents Total (n=24,235); 2019 (n=25,229)

SENDING OR RECEIVING EMAILS TO OR FROM FOREIGN ADDRESSES

Despite some variance by economy, on balance a higher proportion in each region feel that it has become *easier,* not *harder*, to send or receive emails to or from foreign addresses, over the past year, but those in developed markets are more on the fence than those in developing economies.

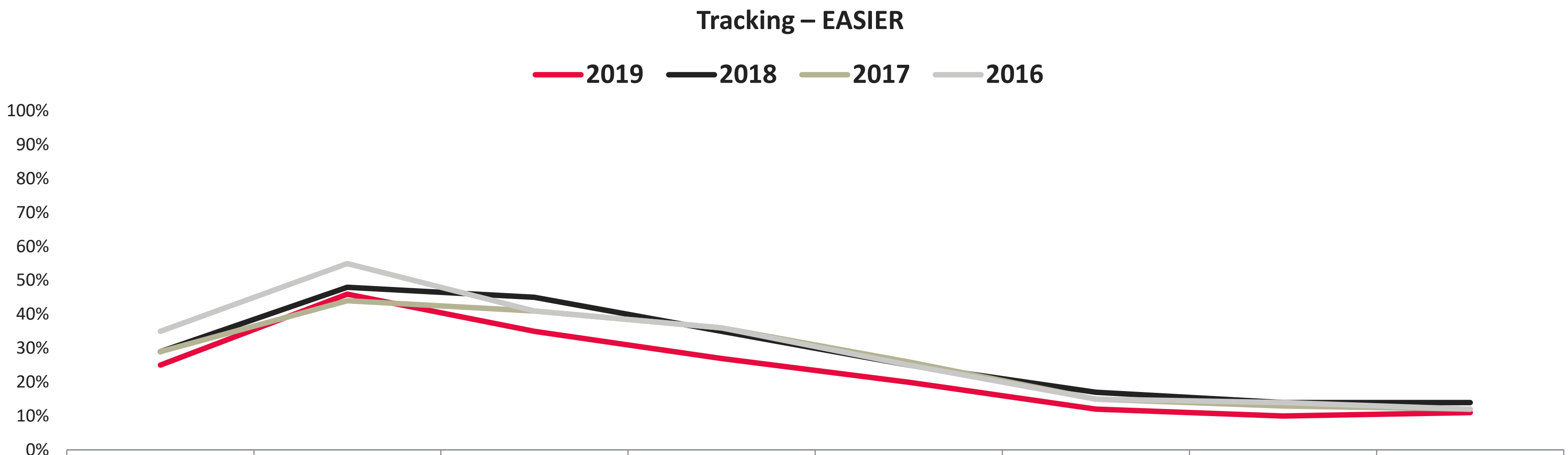


Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet: [Sending or receiving emails to or from foreign addresses]
Base: All Respondents Total 2019 (n=25,229) Total may not sum to 100% as DK/Refuse not shown

Total may not sum to 100% as DK/Refuse not shown

SENDING OR RECEIVING EMAILS TO OR FROM FOREIGN ADDRESSES

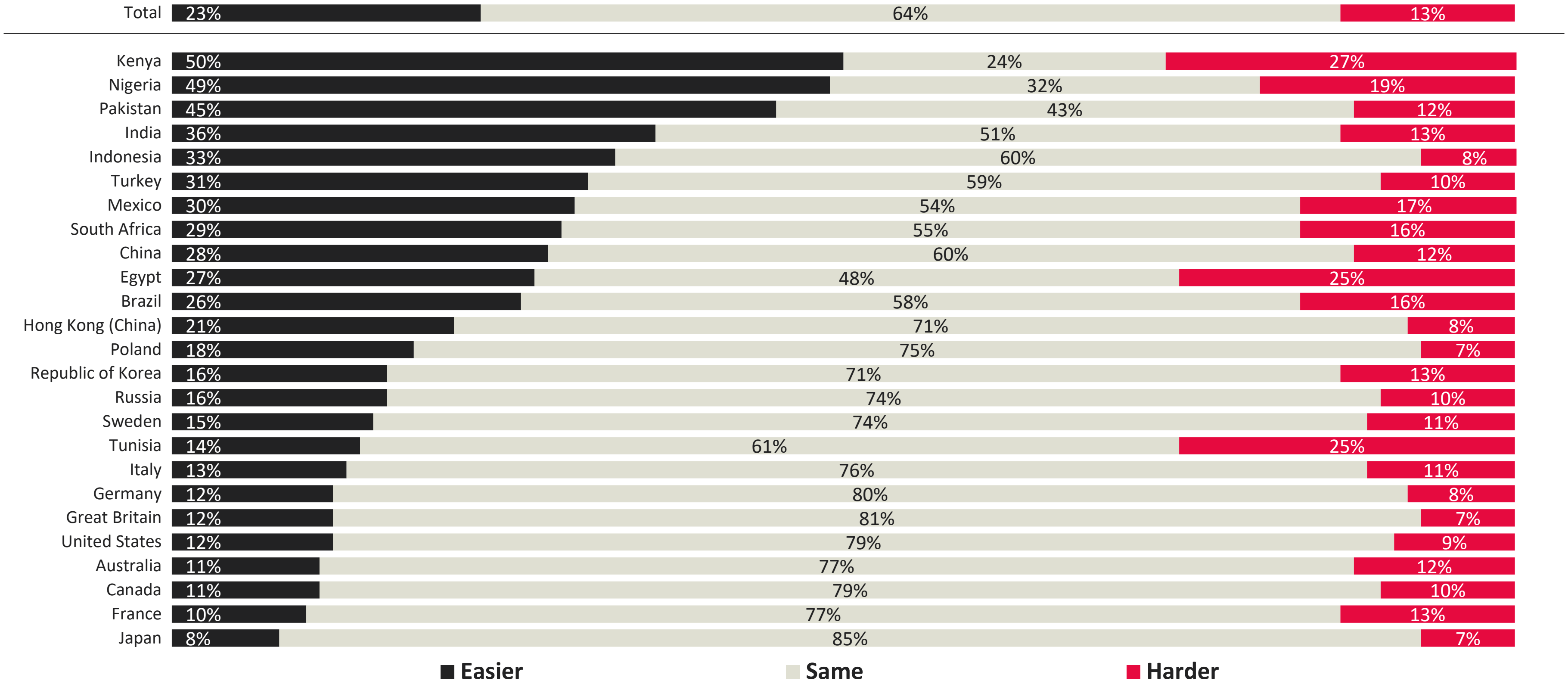
In each of the regions, a smaller proportion think that sending or receiving emails to or from foreign addresses has become *easier*, compared to the 2018 survey.



	Total	Middle East/Africa	LATAM	BRICS	APAC	Europe	North America	G-8 Countries
2019	25%	46%	35%	27%	20%	12%	10%	11%
2018	29%	48%	45%	35%	25%	17%	14%	14%
2017	29%	44%	41%	36%	26%	15%	13%	12%
2016	35%	55%	41%	36%	25%	15%	14%	12%

Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet:
[Sending or receiving emails to or from foreign addresses] Base: All Respondents Total 2018 (n=24,235); 2019 (n=25,229)

In all economies, save for Australia, Tunisia & France, a greater proportion feel as though it has become *easier* to use encrypted communications, as opposed to *harder*, in the past year.

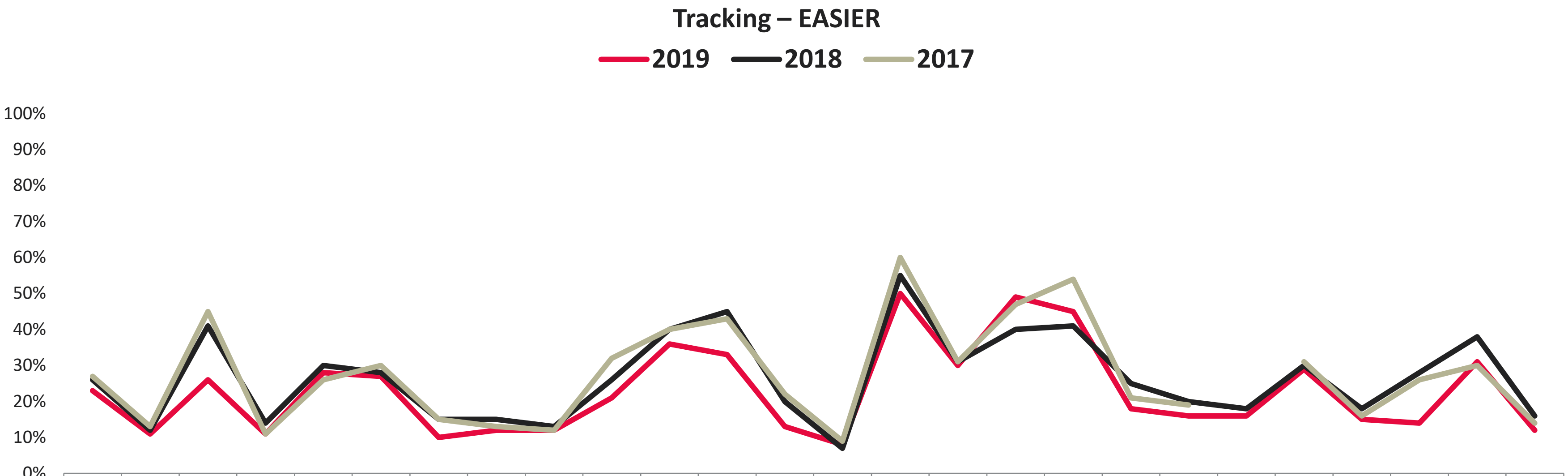


Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet:
[Use encrypted communications] Base: All Respondents Total 2019 (n=25,229) Total may not sum to 100% as DK/Refuse not shown

Total may not sum to 100% as DK/Refuse not shown

USE ENCRYPTED COMMUNICATIONS

Wave-over-wave, a lower proportion of global citizens feel that it has become *easier* to use encrypted communications. Once again, this is a result of the Internet's maturity & more specifically, a higher proportion of global citizens perceiving their ease of use as being about the *same*, relative to the 2018 survey.

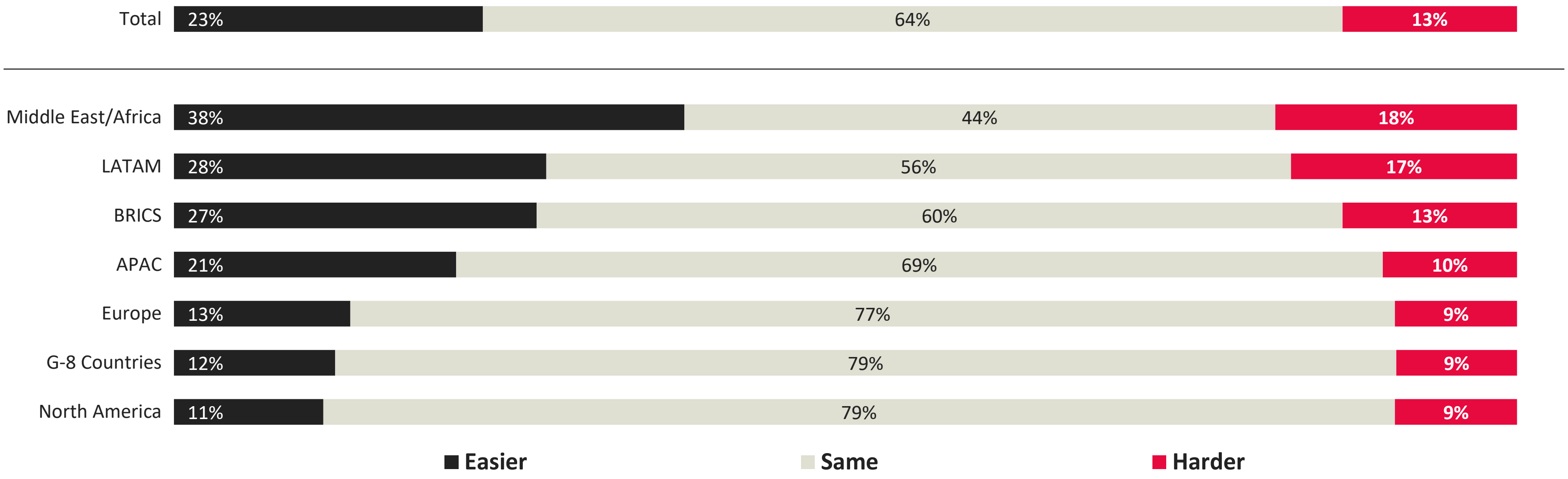


	TL	AU	BR	CA	CN	EG	FR	DE	GB	HK	IN	ID	IT	JP	KE	MX	NG	PK	PL	KR	RU	ZA	SE	TN	TR	US
2019	23%	11%	26%	11%	28%	27%	10%	12%	12%	21%	36%	33%	13%	8%	50%	30%	49%	45%	18%	16%	16%	29%	15%	14%	31%	12%
2018	26%	12%	41%	14%	30%	28%	15%	15%	13%	26%	40%	45%	20%	7%	55%	31%	40%	41%	25%	20%	18%	30%	18%	28%	38%	16%
2017	27%	13%	45%	11%	26%	30%	15%	13%	12%	32%	40%	43%	22%	9%	60%	31%	47%	54%	21%	19%	n/a	31%	16%	26%	30%	14%

Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet:
[Use encrypted communications] Base: All Respondents Total (n=24,235); 2019 (n=25,229)

USE ENCRYPTED COMMUNICATIONS

A much higher share of citizens living in less developed economies think that it is *easier* to use encrypted communications, compared to a year ago. Conversely, nearly four in five of those living in developed economies perceive the ease of use as being relatively unchanged versus a year ago.

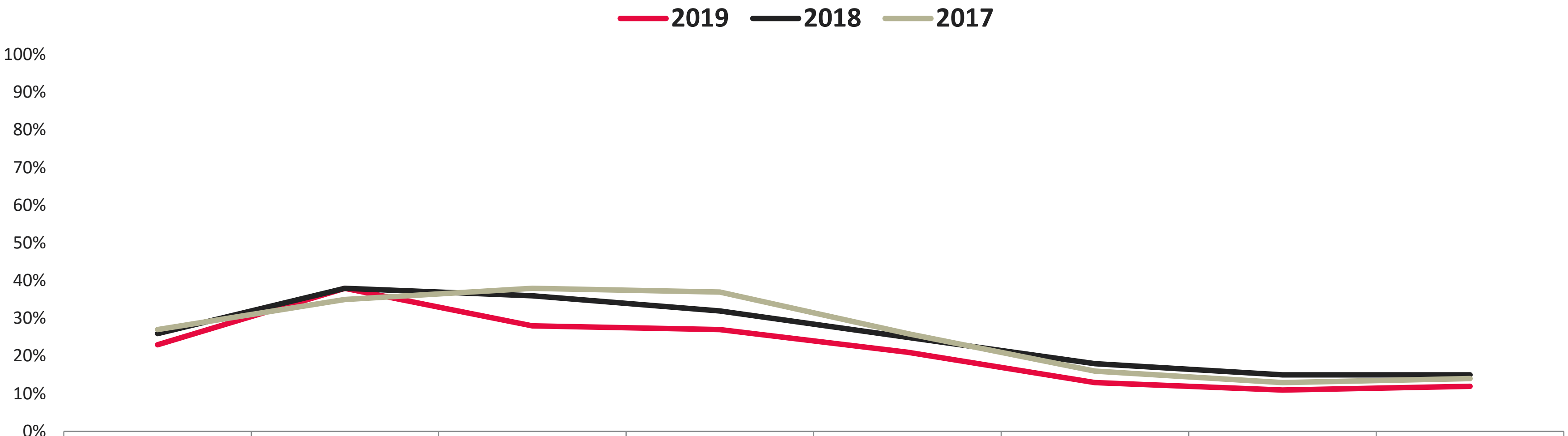


Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet:
[Use encrypted communications] Base: All Respondents Total 2019 (n=25,229) Total may not sum to 100% as DK/Refuse not shown

Total may not sum to 100% as DK/Refuse not shown

Across all regions as many or fewer would describe using encrypted communications as becoming *easier*, compared to the previous iteration of this survey a year ago. Again, this can mostly be attributed to the Internet's development, and the fact that most feel as though nothing has really changed.

Tracking – EASIER

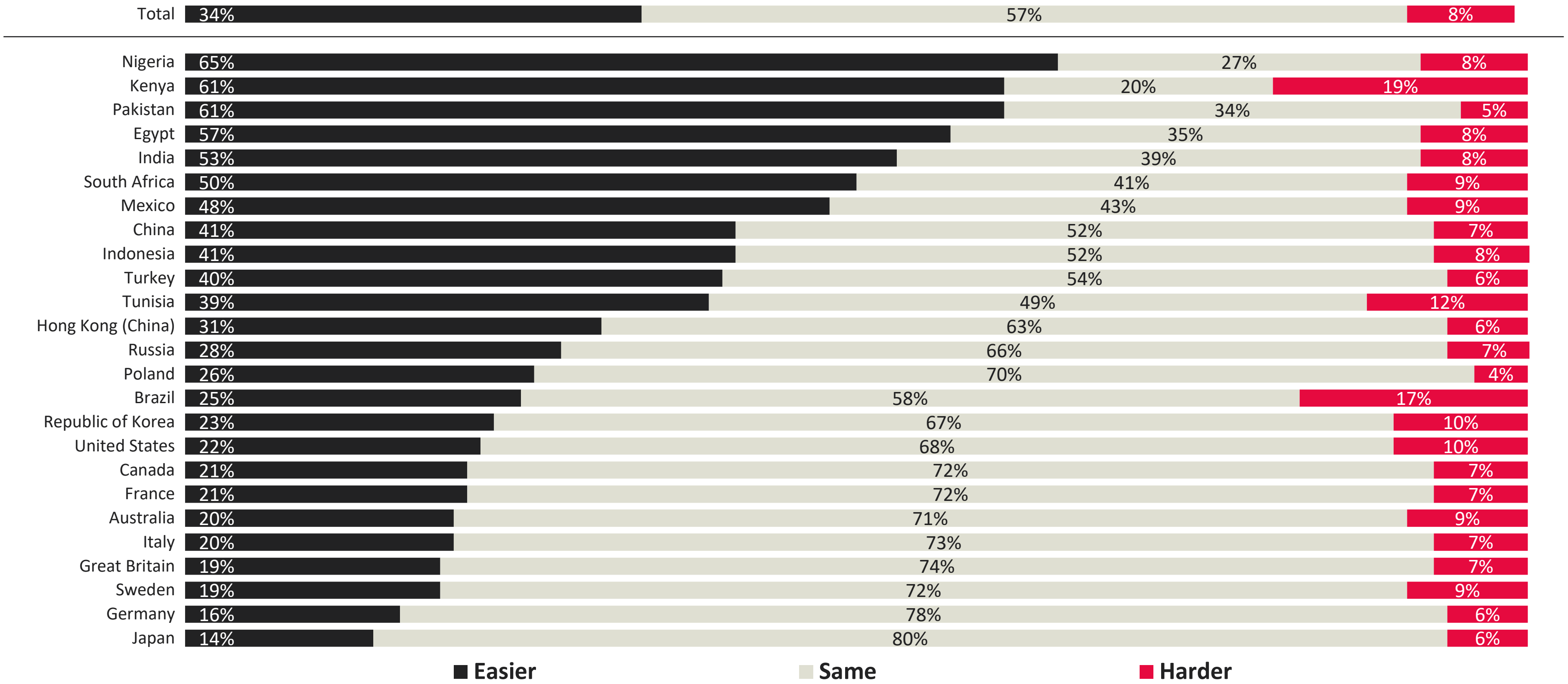


	Total	Middle East/Africa	LATAM	BRICS	APAC	Europe	North America	G-8 Countries
2019	23%	38%	28%	27%	21%	13%	11%	12%
2018	26%	38%	36%	32%	25%	18%	15%	15%
2017	27%	35%	38%	37%	26%	16%	13%	14%

Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet:
[Use encrypted communications] Base: All Respondents Total 2018 (n=24,235); 2019 (n=25,229)

KEEP SOFTWARE UP TO DATE

The vast majority (91%) of global citizens report that it is *easier* (34%) or about as easy as it was a year ago (57%) for them to keep their software up-to-date.

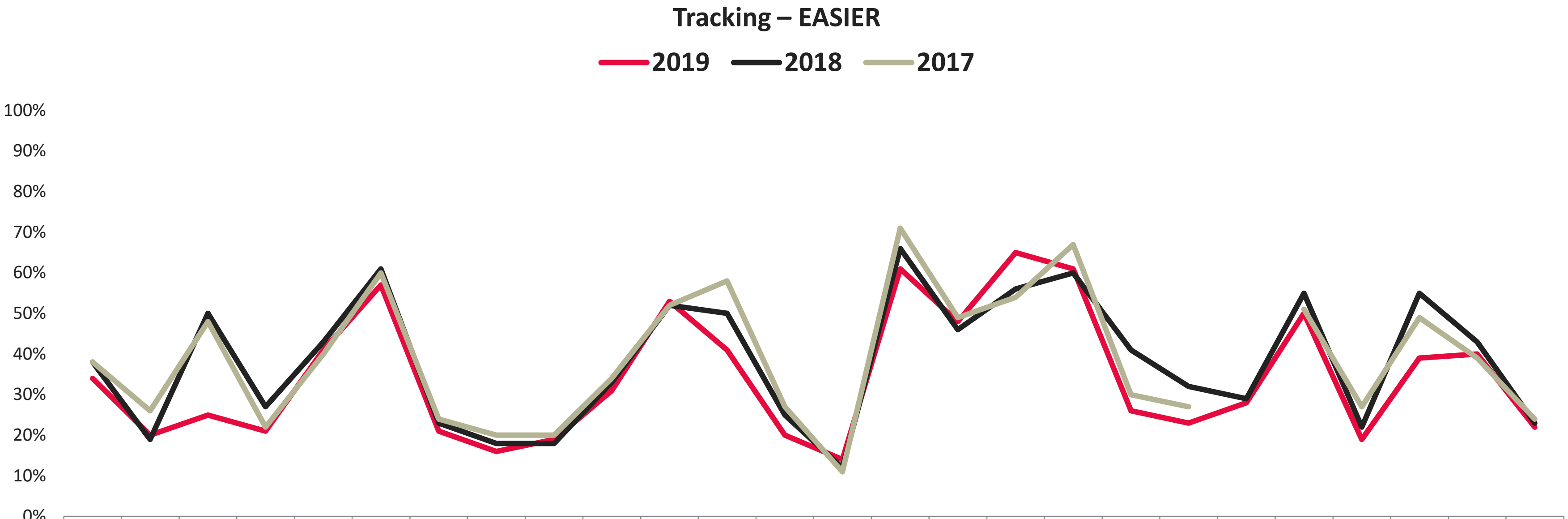


Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet:
[Keep software up to date] Base: All Respondents Total 2019 (n=25,229) Total may not sum to 100% as DK/Refuse not shown

Total may not sum to 100% as DK/Refuse not shown

KEEP SOFTWARE UP TO DATE

Relative to the 2018 survey, a lower proportion of global citizens think that it has become *easier* to keep their software up-to-date (-4 pts). The most sizeable drop occurred in Brazil (-25).

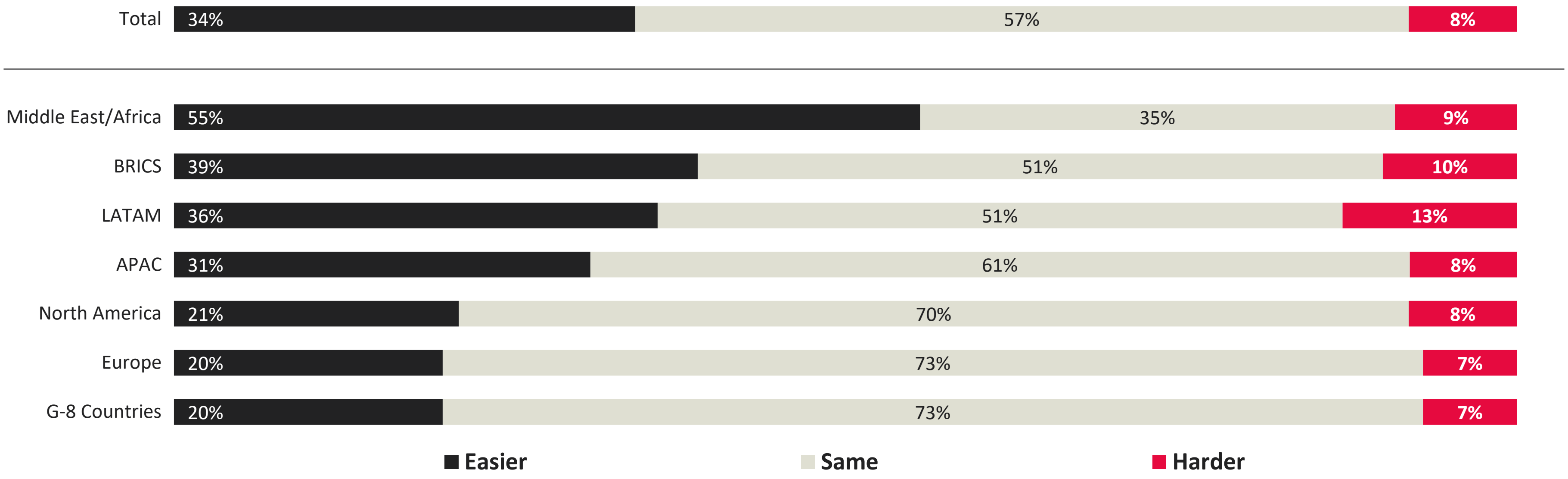


	TL	AU	BR	CA	CN	EG	FR	DE	GB	HK	IN	ID	IT	JP	KE	MX	NG	PK	PL	KR	RU	ZA	SE	TN	TR	US
2019	34%	20%	25%	21%	41%	57%	21%	16%	19%	31%	53%	41%	20%	14%	61%	48%	65%	61%	26%	23%	28%	50%	19%	39%	40%	22%
2018	38%	19%	50%	27%	43%	61%	23%	18%	18%	33%	52%	50%	25%	12%	66%	46%	56%	60%	41%	32%	29%	55%	22%	55%	43%	23%
2017	38%	26%	48%	22%	40%	60%	24%	20%	20%	34%	52%	58%	27%	11%	71%	49%	54%	67%	30%	27%	n/a	51%	27%	49%	39%	24%

Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet:
[Keep software up to date] Base: All Respondents Total (n=24,235); 2019 (n=25,229)

KEEP SOFTWARE UP TO DATE

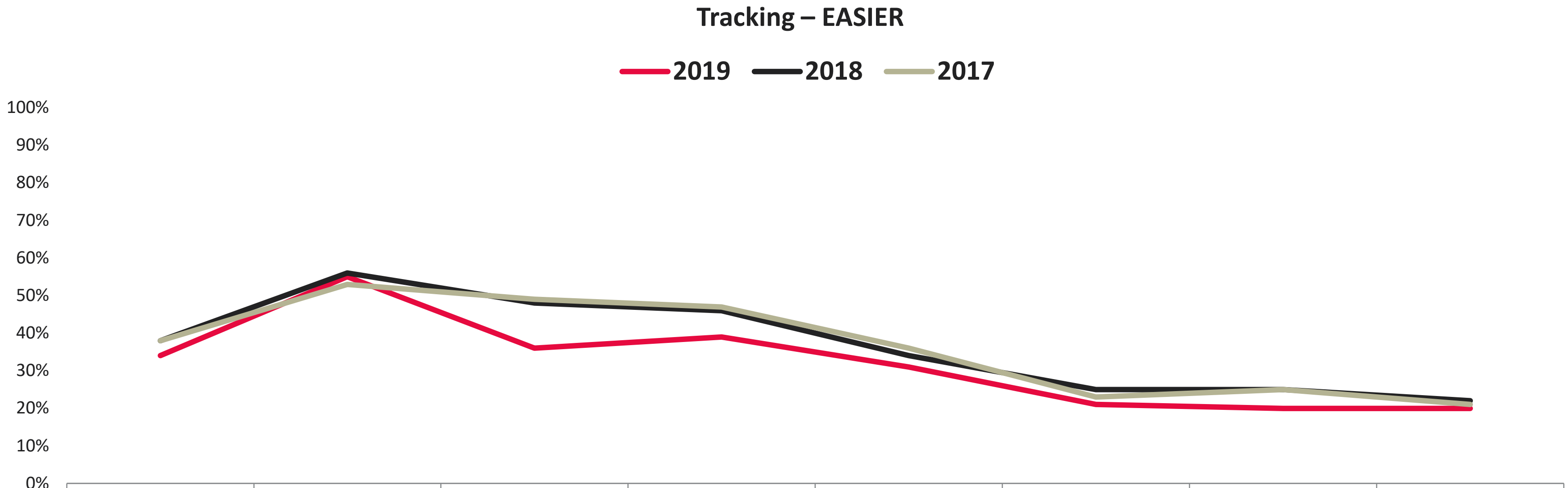
Consistent with other metrics, citizens living in developing economies tend to be more likely to think that keeping software up-to-date has become *easier*, over the past year, including most (55%) in the Middle East & Africa.



Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet:
[Keep software up to date] Base: All Respondents Total 2019 (n=25,229) Total may not sum to 100% as DK/Refuse not shown

Total may not sum to 100% as DK/Refuse not shown

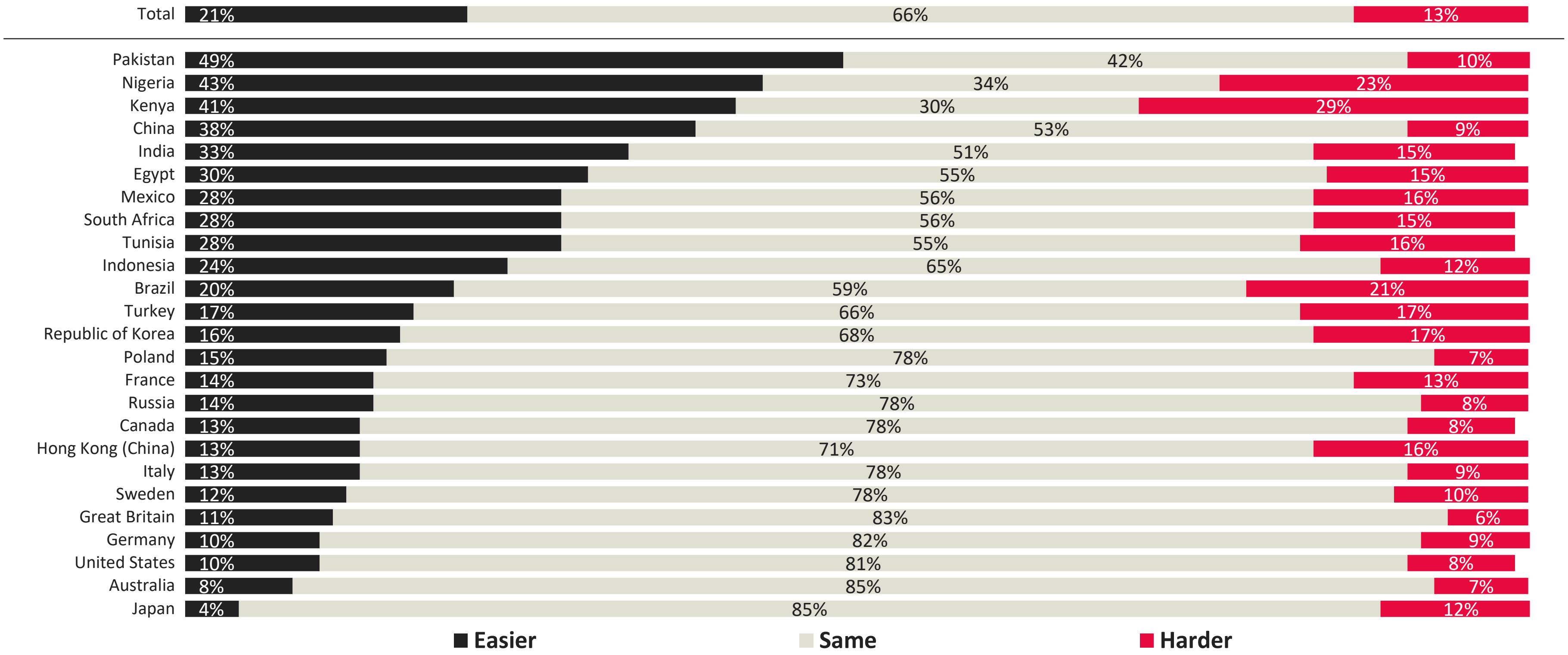
Similar to most other metrics, a lower proportion in each of the regional economies would say that it is *easier* to keep software up-to-date, relative to 2018. This again, likely has more to do with the Internet's maturity than anything.



	Total	Middle East/Africa	LATAM	BRICS	APAC	North America	Europe	G-8 Countries
2019	34%	55%	36%	39%	31%	21%	20%	20%
2018	38%	56%	48%	46%	34%	25%	25%	22%
2017	38%	53%	49%	47%	36%	23%	25%	21%

Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet: [Keep software up to date] Base: All Respondents Total 2018 (n=24,235); 2019 (n=25,229)

Outside of Pakistan, Nigeria & Kenya, majorities in all other economies would describe the ease of using VOIP as being about the *same*, compared to a year ago.

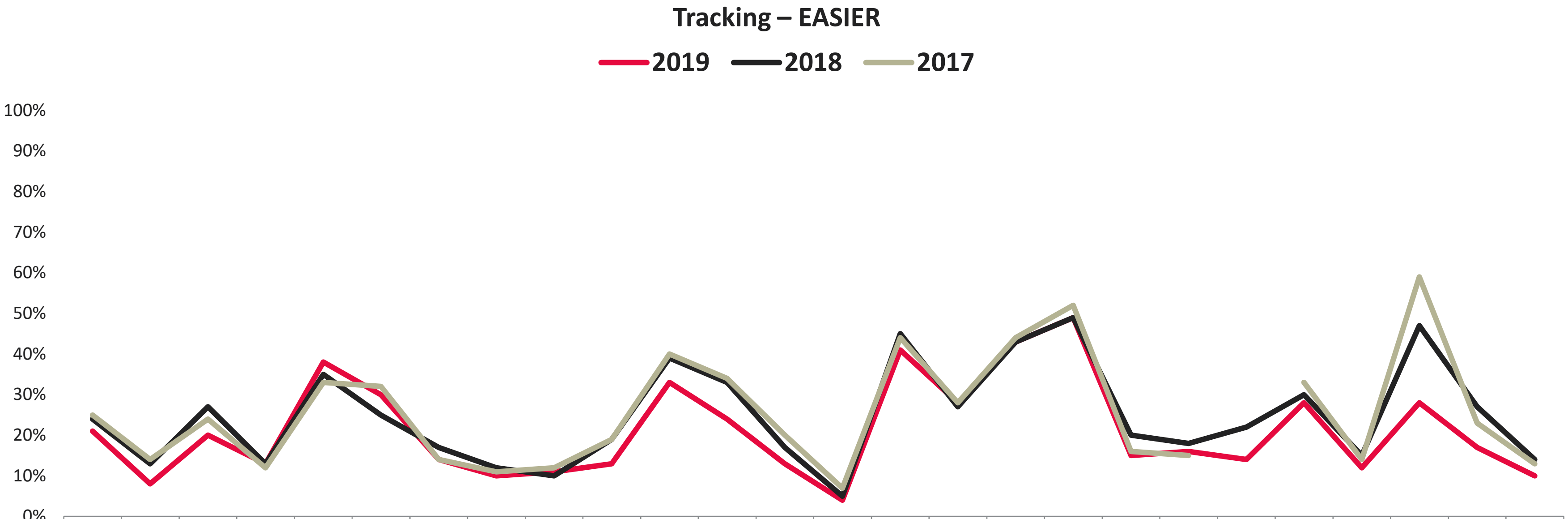


Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet:
[Use voice over IP (VoIP)] Base: All Respondents Total 2019 (n=25,229) Total may not sum to 100% as DK/Refuse not shown

Total may not sum to 100% as DK/Refuse not shown

USE VOICE OVER IP (VOIP)

On balance, fewer (-3 pts) think that it has become easier to use VOIP, over the past year, relative to the 2018 survey, with much of the drop occurring in Tunisia (-19).

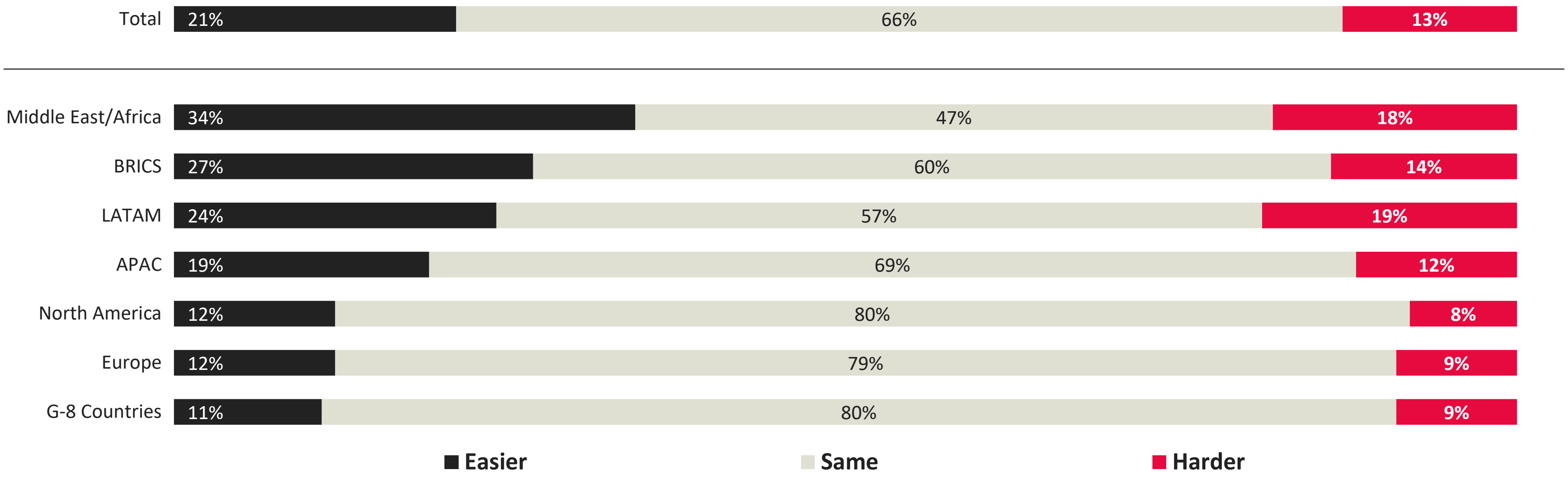


	TL	AU	BR	CA	CN	EG	FR	DE	GB	HK	IN	ID	IT	JP	KE	MX	NG	PK	PL	KR	RU	ZA	SE	TN	TR	US
2019	21%	8%	20%	13%	38%	30%	14%	10%	11%	13%	33%	24%	13%	4%	41%	28%	43%	49%	15%	16%	14%	28%	12%	28%	17%	10%
2018	24%	13%	27%	13%	35%	25%	17%	12%	10%	19%	39%	33%	17%	5%	45%	27%	43%	49%	20%	18%	22%	30%	15%	47%	27%	14%
2017	25%	14%	24%	12%	33%	32%	14%	11%	12%	19%	40%	34%	20%	7%	44%	28%	44%	52%	16%	15%	n/a	33%	14%	59%	23%	13%

Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet:
[Use voice over IP (VoIP)] Base: All Respondents Total (n=24,235); 2019 (n=25,229)

USE VOICE OVER IP (VOIP)

Like other metrics, a greater share of citizens in less developed nations think that it has become *easier* to use VOIP, in the past year.

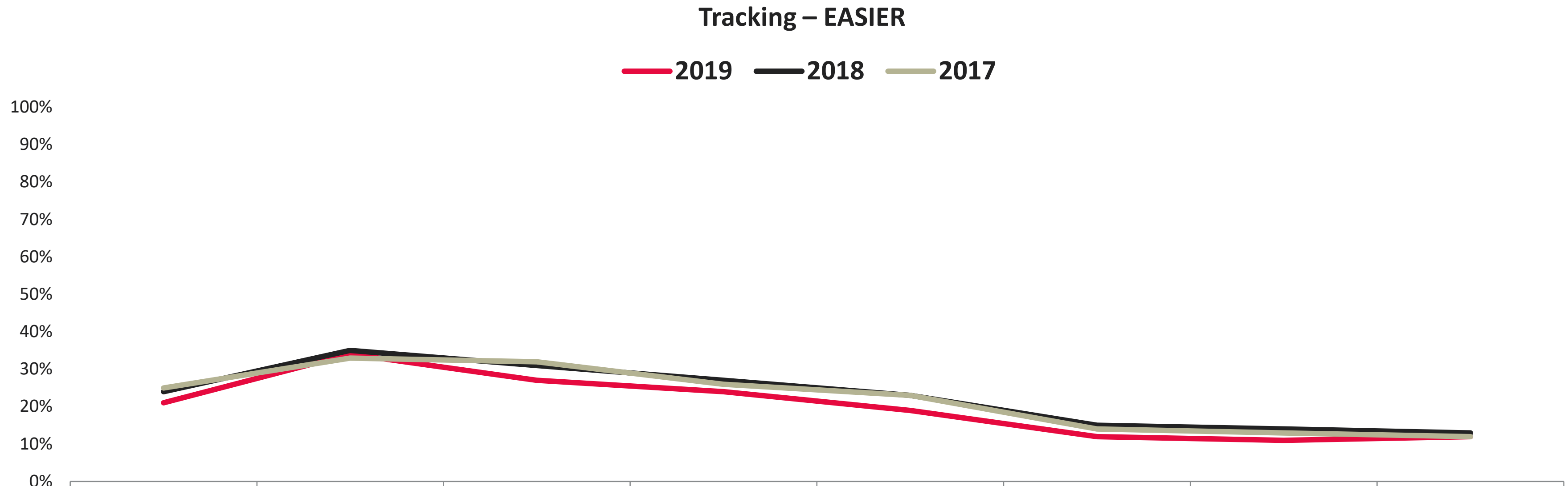


Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet:
[Use voice over IP (VoIP)] Base: All Respondents Total 2019 (n=25,229) Total may not sum to 100% as DK/Refuse not shown

Total may not sum to 100% as DK/Refuse not shown

USE VOICE OVER IP (VOIP)

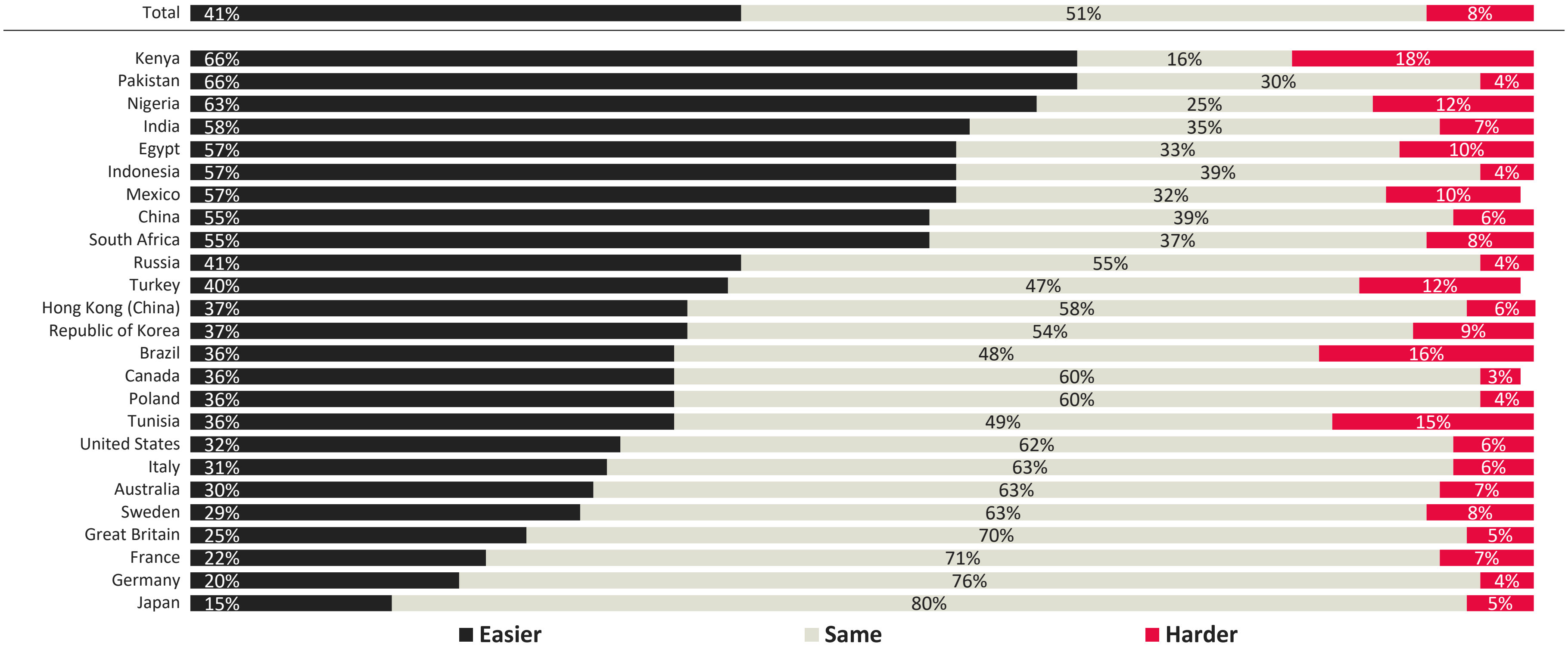
Once again, across all regional economies a lower proportion (-3 pts) think that it is *easier* to keep software up-to-date, relative to 2018.



	Total	Middle East/Africa	BRICS	LATAM	APAC	Europe	G-8 Countries	North America
2019	21%	34%	27%	24%	19%	12%	11%	12%
2018	24%	35%	31%	27%	23%	15%	14%	13%
2017	25%	33%	32%	26%	23%	14%	13%	12%

Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet: [Use voice over IP (VoIP)] Base: All Respondents Total 2018 (n=24,235); 2019 (n=25,229)

Over nine in ten (92%) feel that it as easy (41%) or *easier* (51%) to buy goods & services online, compared to a year ago, including majorities in Kenya, Pakistan, Nigeria, India, Egypt, Mexico, Indonesia, China & South Africa who think that it has become *easier*.



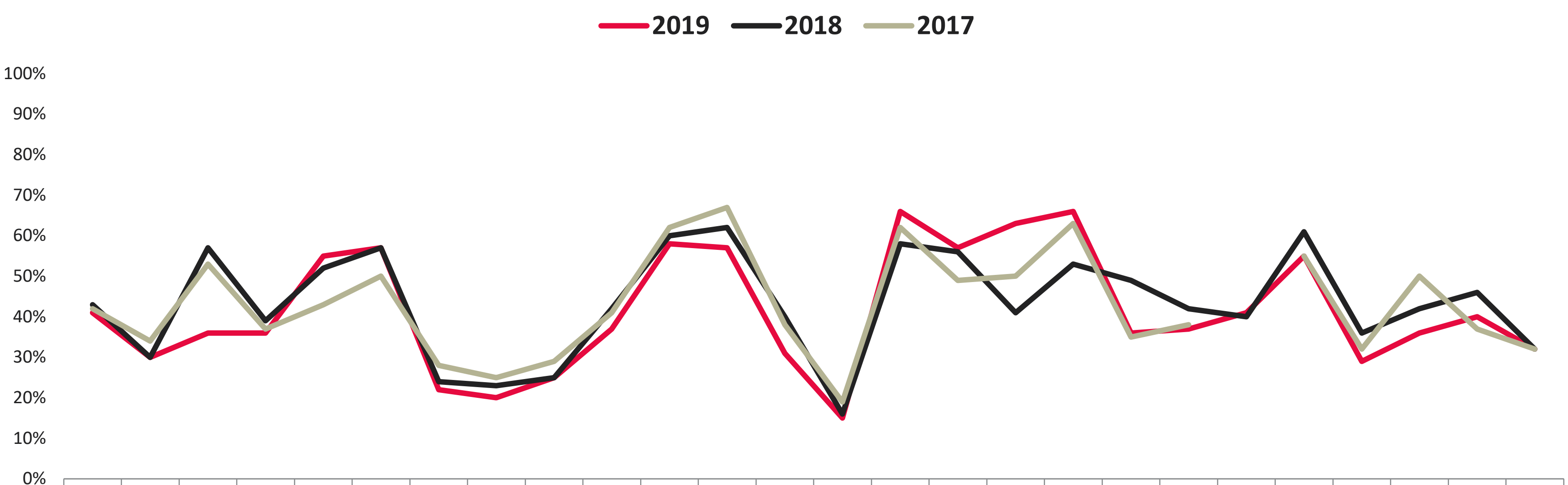
Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet:
[Buying goods and services online] Base: All Respondents Total 2019 (n=25,229) Total may not sum to 100% as DK/Refuse not shown

Total may not sum to 100% as DK/Refuse not shown

BUYING GOODS AND SERVICES ONLINE

As is the case with most other metrics, a lower proportion (-2 pts) think that it has become *easier* to buy goods and services online, over the past year.

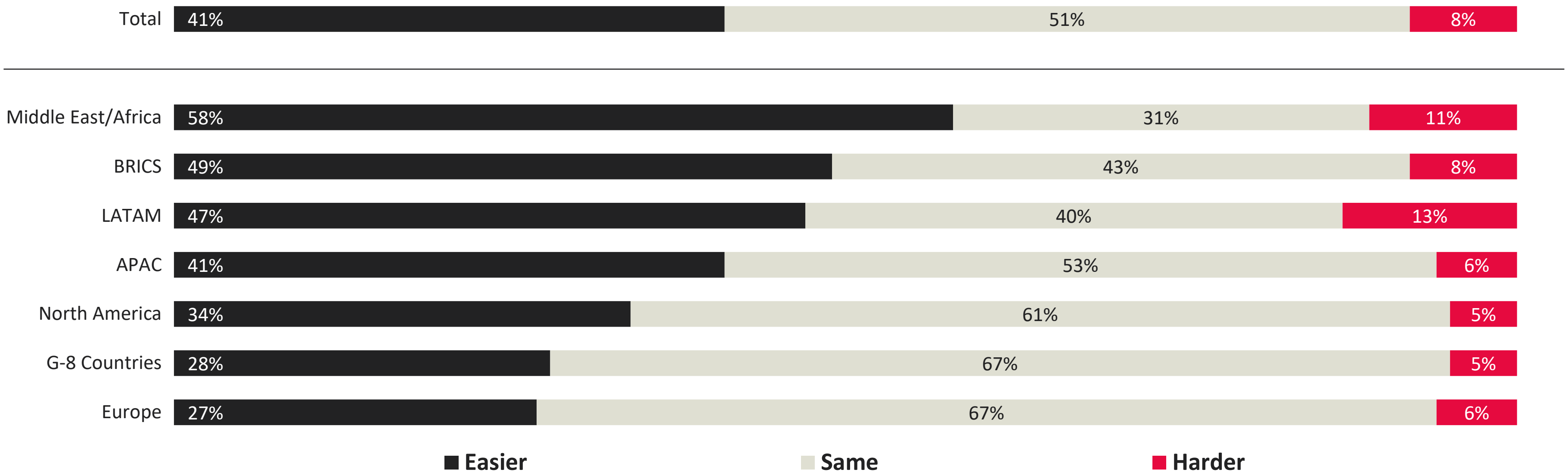
Tracking – EASIER



	TL	AU	BR	CA	CN	EG	FR	DE	GB	HK	IN	ID	IT	JP	KE	MX	NG	PK	PL	KR	RU	ZA	SE	TN	TR	US
2019	41%	30%	36%	36%	55%	57%	22%	20%	25%	37%	58%	57%	31%	15%	66%	57%	63%	66%	36%	37%	41%	55%	29%	36%	40%	32%
2018	43%	30%	57%	39%	52%	57%	24%	23%	25%	42%	60%	62%	40%	16%	58%	56%	41%	53%	49%	42%	40%	61%	36%	42%	46%	32%
2017	42%	34%	53%	37%	43%	50%	28%	25%	29%	41%	62%	67%	38%	19%	62%	49%	50%	63%	35%	38%	n/a	55%	32%	50%	37%	32%

Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet: [Buying goods and services online] Base: All Respondents Total (n=24,235); 2019 (n=25,229)

Similar trends prevail when it comes to buying goods & services online, as a higher proportion of those living in developing economies tend to think that it has become *easier*, over the past year.

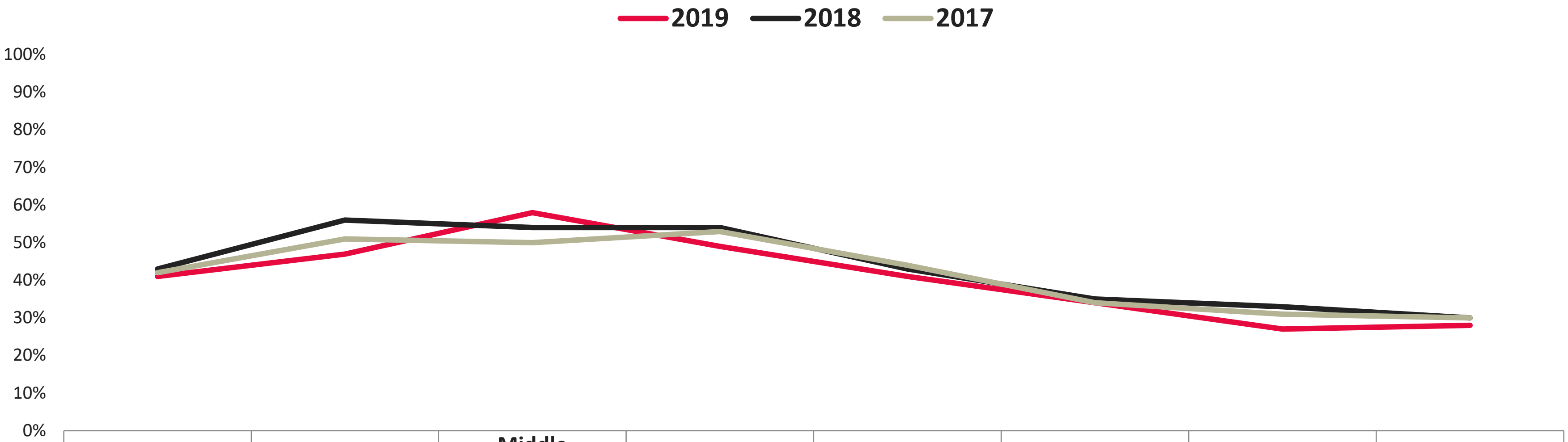


Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet:
[Buying goods and services online] Base: All Respondents Total 2019 (n=25,229) Total may not sum to 100% as DK/Refuse not shown

Total may not sum to 100% as DK/Refuse not shown

In each region, save for the Middle East & Africa (+4 pts), there has been a drop in the share of citizens who feel that it is becoming *easier* to buy goods & services online, as more would rate this as being about the *same*, relative to the 2018 survey.

Tracking – EASIER

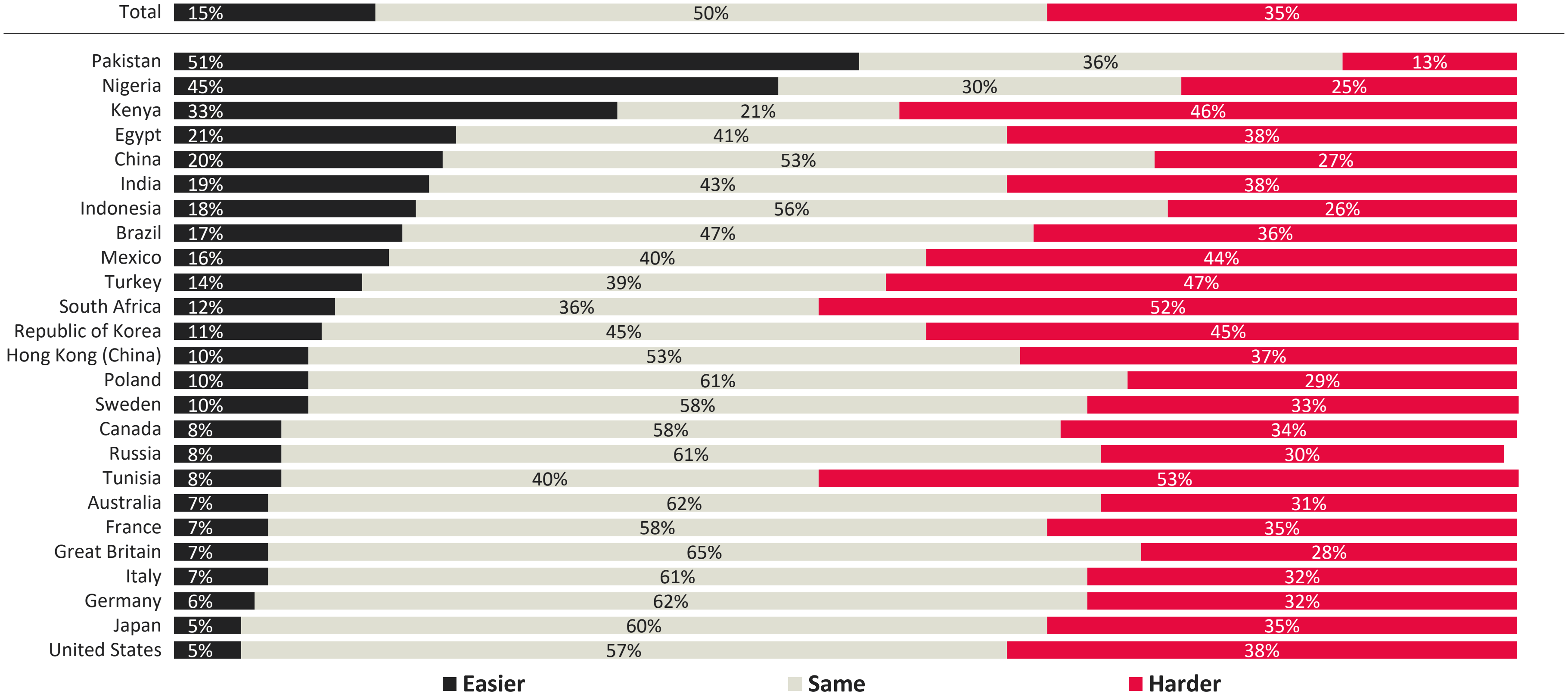


	Total	LATAM	Middle East/Africa	BRICS	APAC	North America	Europe	G-8 Countries
2019	41%	47%	58%	49%	41%	34%	27%	28%
2018	43%	56%	54%	54%	43%	35%	33%	30%
2017	42%	51%	50%	53%	44%	34%	31%	30%

Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet: [Buying goods and services online] Base: All Respondents Total 2018 (n=24,235); 2019 (n=25,229)

TRUST UNKNOWN EMAIL ADDRESSES

Overall, global citizens are more than twice as likely to think that it has become *harder*, as opposed to *easier*, to trust unknown email addresses, over the past year.

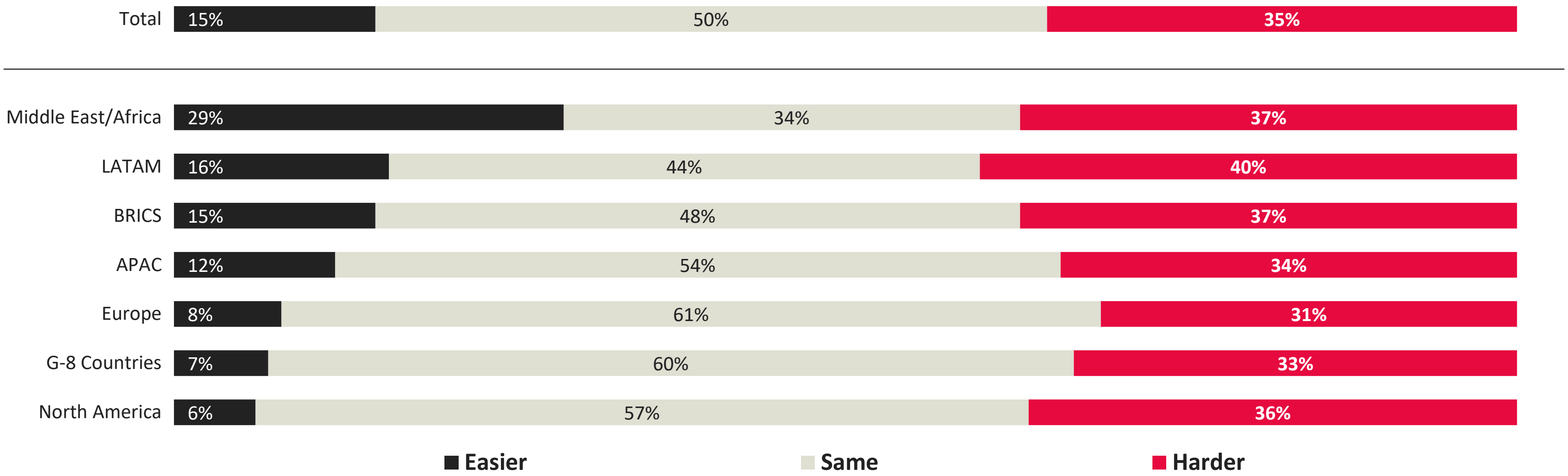


Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet:
[Trust unknown email addresses] Base: All Respondents Total 2019 (n=25,229) Total may not sum to 100% as DK/Refuse not shown

Total may not sum to 100% as DK/Refuse not shown

TRUST UNKNOWN EMAIL ADDRESSES

In all regions, considerably more think that it has become *harder* as opposed to *easier* to trust unknown email addresses, in the past year.



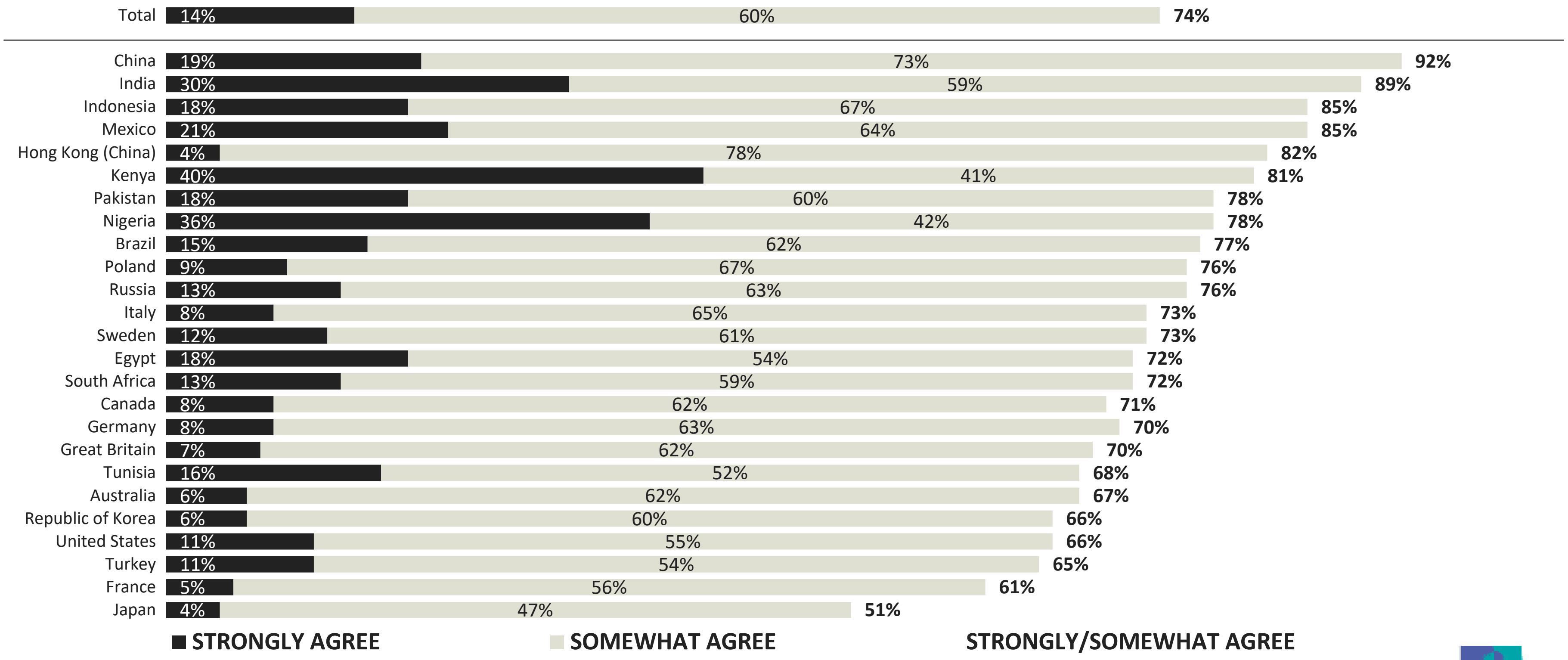
Q5. Compared to one year ago, would you say that it is easier or harder to do the following things on the internet:
[Trust unknown email addresses] Base: All Respondents Total 2019 (n=25,229) Total may not sum to 100% as DK/Refuse not shown

Total may not sum to 100% as DK/Refuse not shown

TRUST IN THE INTERNET

Overall, I trust the Internet— By Economy

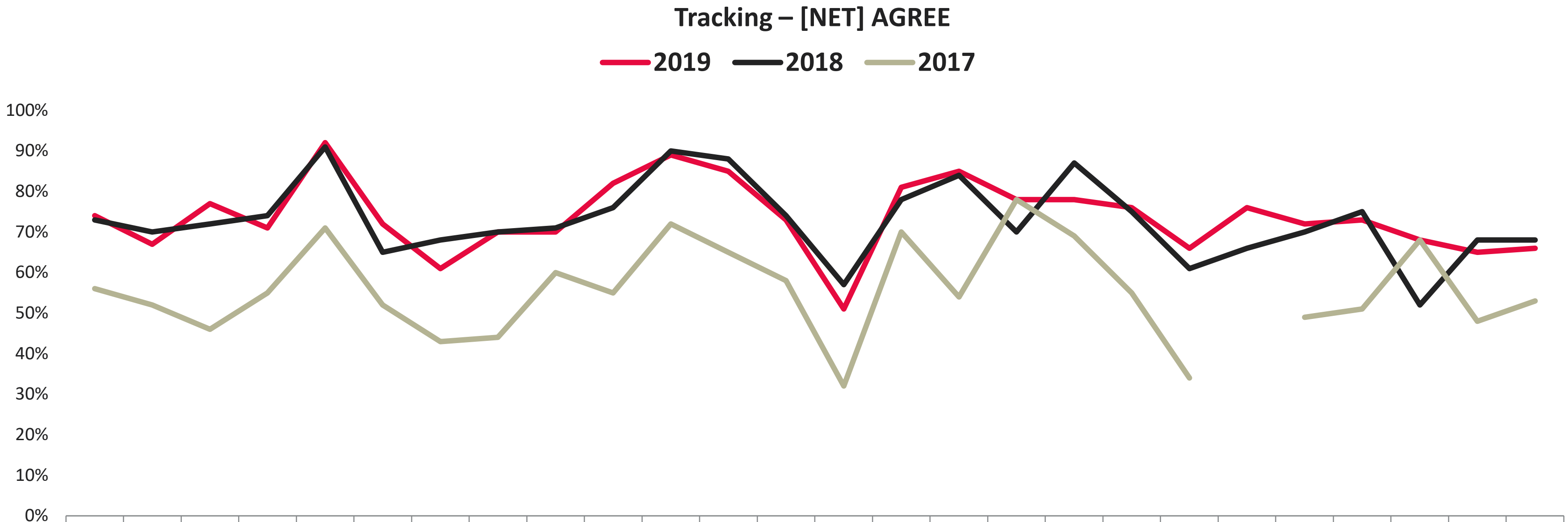
Overall, three in four (74%) trust the Internet. Citizens of China (92%) & India (89%) are among the most trusting of the Internet, whereas barely half (51%) of Japanese citizens *agree* (4% strongly; 47% somewhat) that, on balance, they trust the Internet.



Q6. To what extent do you agree or disagree with the following statement:
Base: All Respondents 2019 (n=25,229); 2018 (n=24,962); 2017 (n=24,225)

Overall, I trust the Internet— By Economy

Since last year, global citizens are no more, or less, likely to *agree* that they trust the Internet. The greatest upward movement occurs in Tunisia (+16 pts). Pakistan (-9) saw the largest drop.



	TL	AU	BR	CA	CN	EG	FR	DE	GB	HK	IN	ID	IT	JP	KE	MX	NG	PK	PL	KR	RU	ZA	SE	TN	TR	US
2019	74%	67%	77%	71%	92%	72%	61%	70%	70%	82%	89%	85%	73%	51%	81%	85%	78%	78%	76%	66%	76%	72%	73%	68%	65%	66%
2018	73%	70%	72%	74%	91%	65%	68%	70%	71%	76%	90%	88%	74%	57%	78%	84%	70%	87%	75%	61%	66%	70%	75%	52%	68%	68%
2017	56%	52%	46%	55%	71%	52%	43%	44%	60%	55%	72%	65%	58%	32%	70%	54%	78%	69%	55%	34%	n/a	49%	51%	68%	48%	53%

Q6. To what extent do you agree or disagree with the following statement:
Base: All Respondents 2019 (n=25,229); 2018 (n=24,962); 2017 (n=24,225)

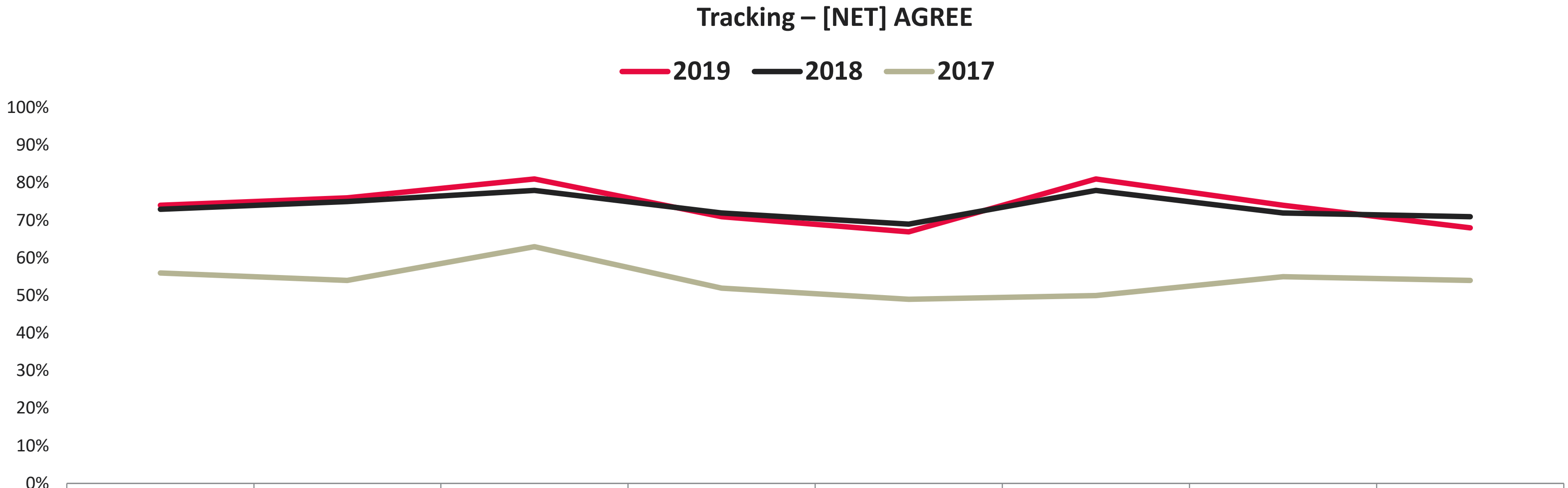
Overall, I trust the Internet— By Regional Economy

Regionally, a high of four in five BRICS (81%) & LATAM (81%) citizens trust the Internet, compared to a low of two in three in North America (68%) & the G-8 (67%).

Q6. To what extent do you agree or disagree with the following statement:
Base: All Respondents 2019 (n=25,229); 2018 (n=24,962); 2017 (n=24,225) BIC (not BRICS)

Overall, I trust the Internet— By Regional Economy

Relative to the 2018 survey, trust has increased the most in BRICS (+3 pts) & LATAM (+3). North America (-3 pts) has experienced the greatest drop, wave-over-wave.

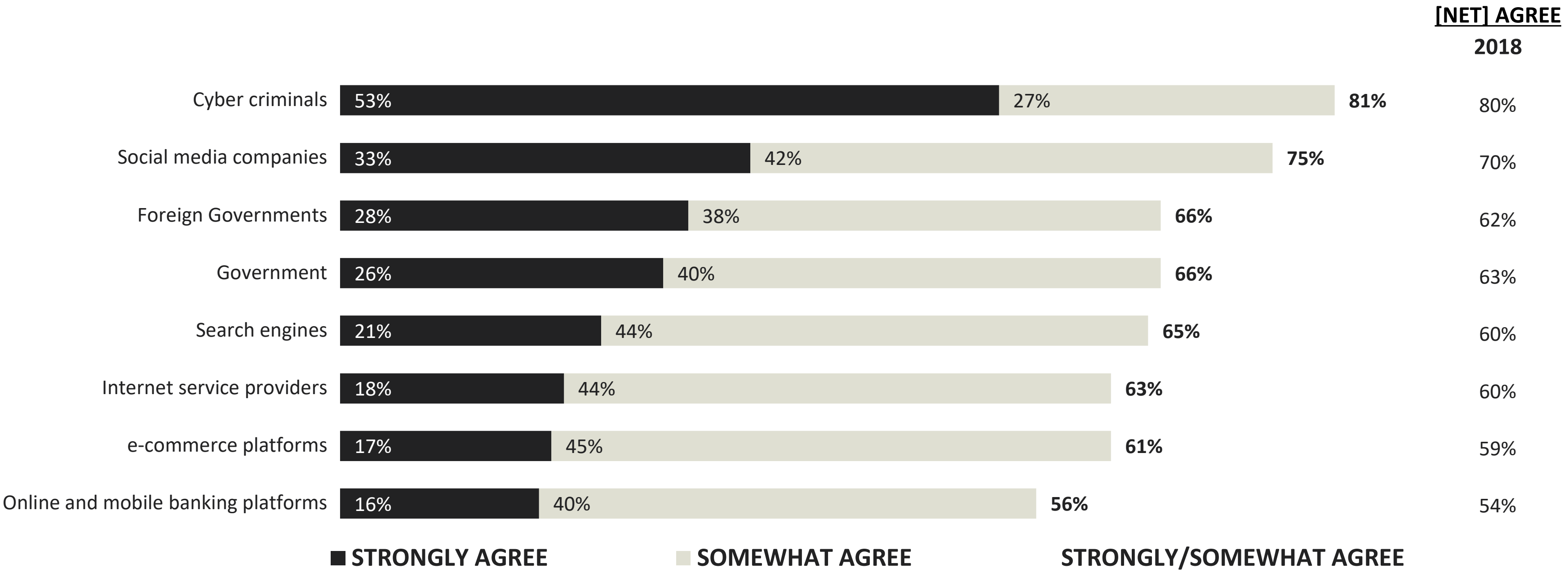


	Total	APAC	BRICS	Europe	G-8 Countries	LATAM	Middle East/Africa	North America
2019	74%	76%	81%	71%	67%	81%	74%	68%
2018	73%	75%	78%	72%	69%	78%	72%	71%
2017	56%	54%	63%	52%	49%	50%	55%	54%

Q6. To what extent do you agree or disagree with the following statement:
Base: All Respondents 2019 (n=25,229); 2018 (n=24,962); 2017 (n=24,225) BIC (not BRICS)

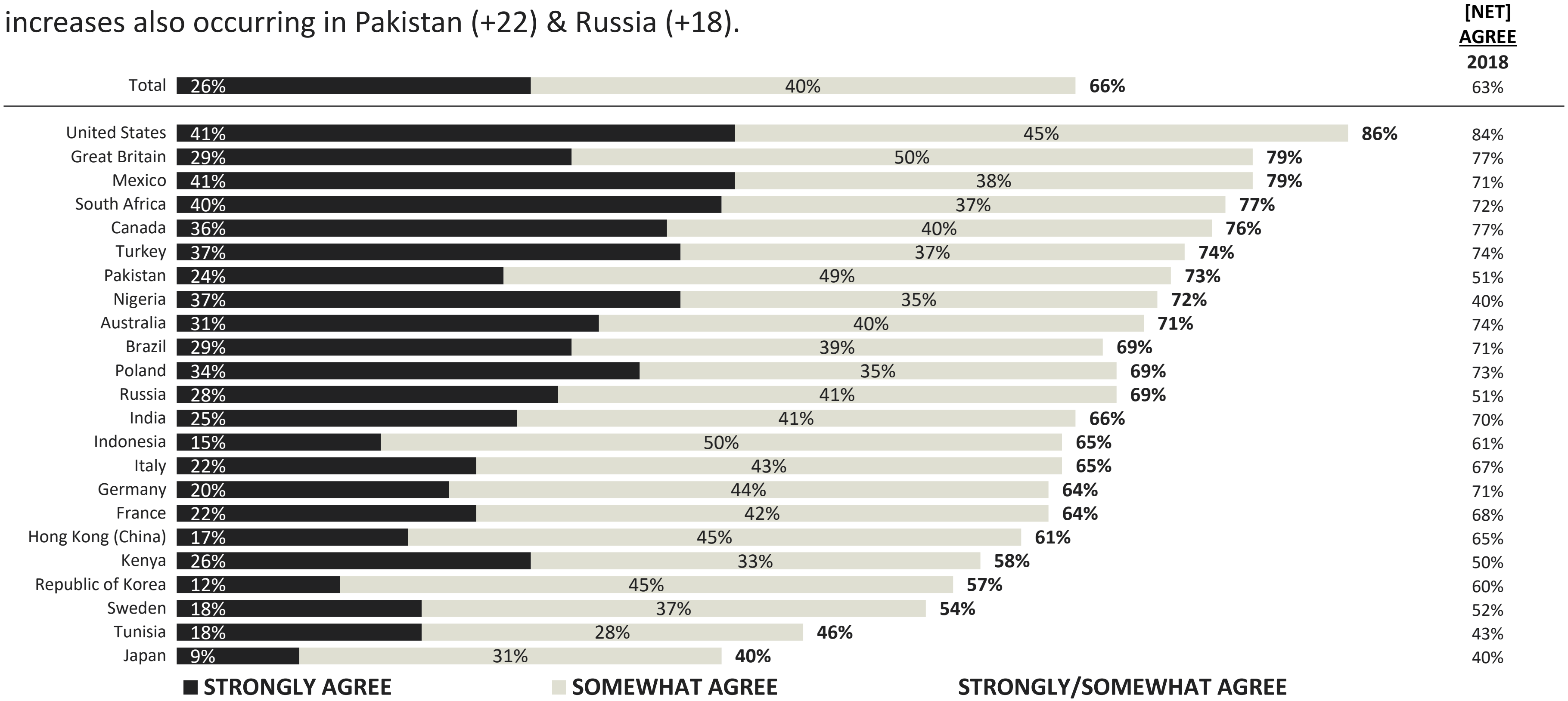
Factors Contributing to Distrust

Among those who distrust the Internet, more *agree* that each factor has contributed to their distrust, wave-over-wave. At eight in ten (81%) cyber criminals continue to be the leading reason for Internet distrust, holding steady, but other factors are growing, most notably social media (+5) and search engines (+5).



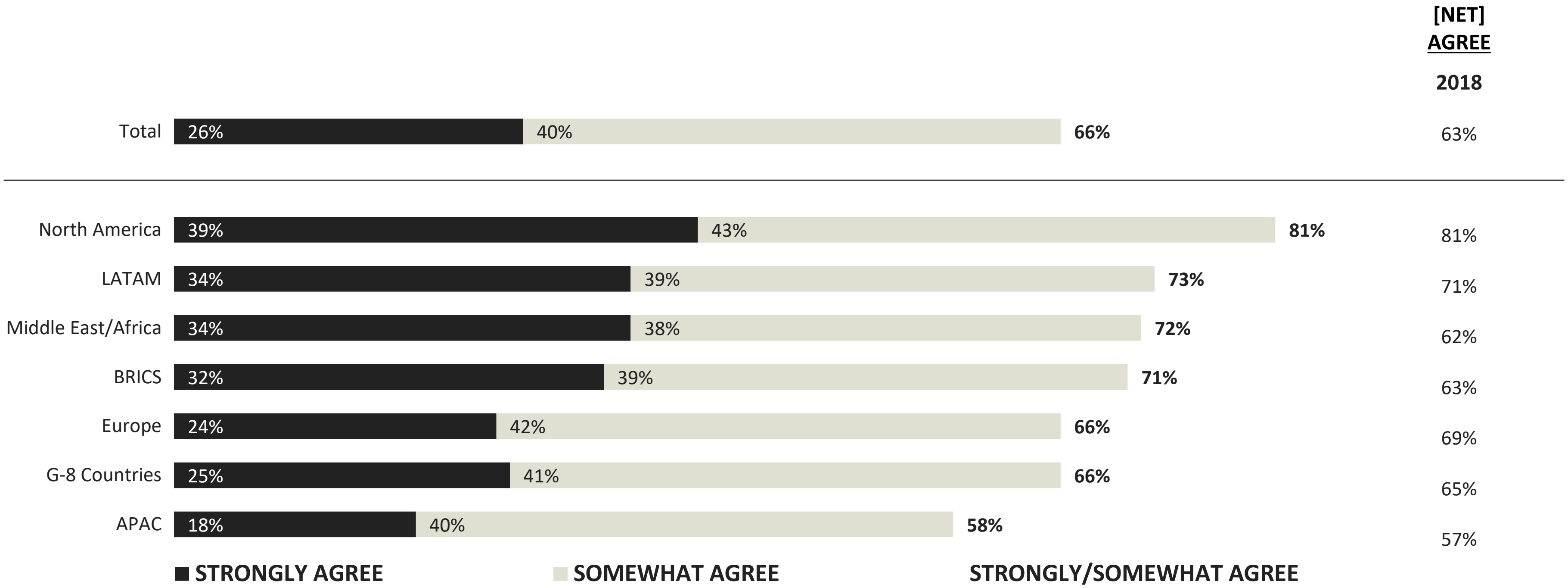
Q7. To what extent do the following contribute to your distrust in the Internet?
Base: All Respondents who do not completely trust the internet 2019 (n=6252); 2018 (n=6778)

Consistent with 2018, Americans continue to be the most likely to *agree* (86%) that government contributes to their distrust. However, Nigerians (+32 pts) are responsible for the largest wave-over-wave increase, with sizeable increases also occurring in Pakistan (+22) & Russia (+18).



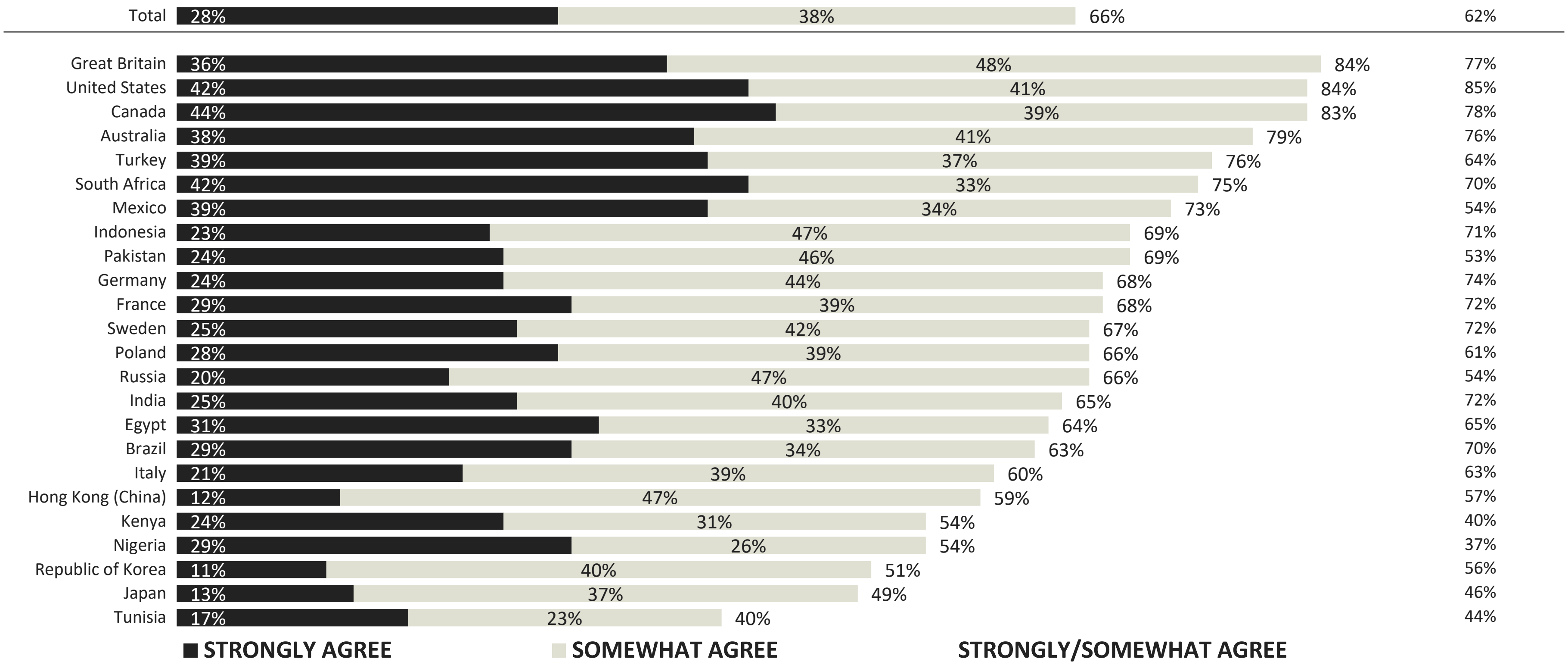
Q7. To what extent do the following contribute to your distrust in the Internet?
Base: All Respondents who do not completely trust the internet 2019 (n=6252); 2018 (n=6778) NOT ASKED IN EGYPT & CHINA

North Americans (81%) continue to be more likely to list government as a source of their distrust, with notable wave-over-wave movement occurring in the BRICS (+8 pts), Middle Eastern & African (+10) economies, specifically.



Q7. To what extent do the following contribute to your distrust in the Internet?
Base: All Respondents who do not completely trust the internet 2019 (n=6252); 2018 (n=6778) NOT ASKED IN EGYPT & CHINA

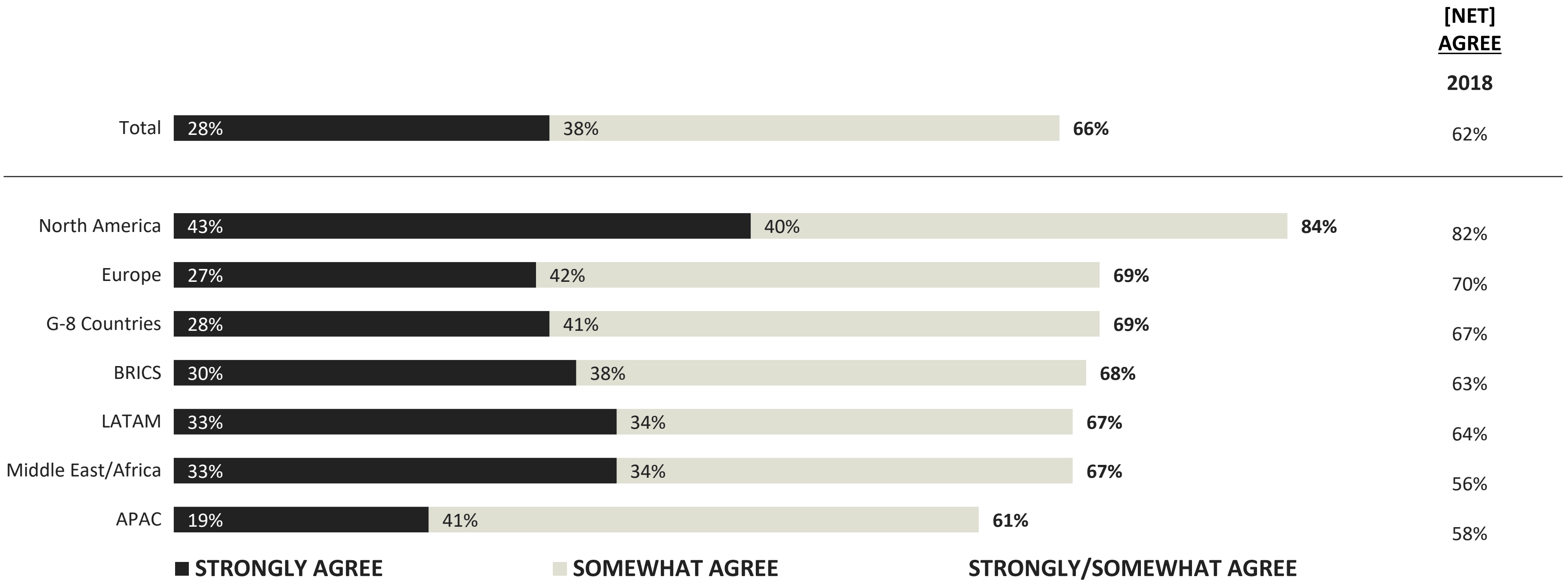
Anglophone citizens (US, GB, Canada & Australia) continue to be among the most likely to *agree* that foreign governments contribute to their overall distrust of the Internet.



Q7. To what extent do the following contribute to your distrust in the Internet?
Base: All Respondents who do not completely trust the internet 2019 (n=6528); 2018 (n=6778) NOT ASKED IN CHINA

FOREIGN GOVERNMENTS

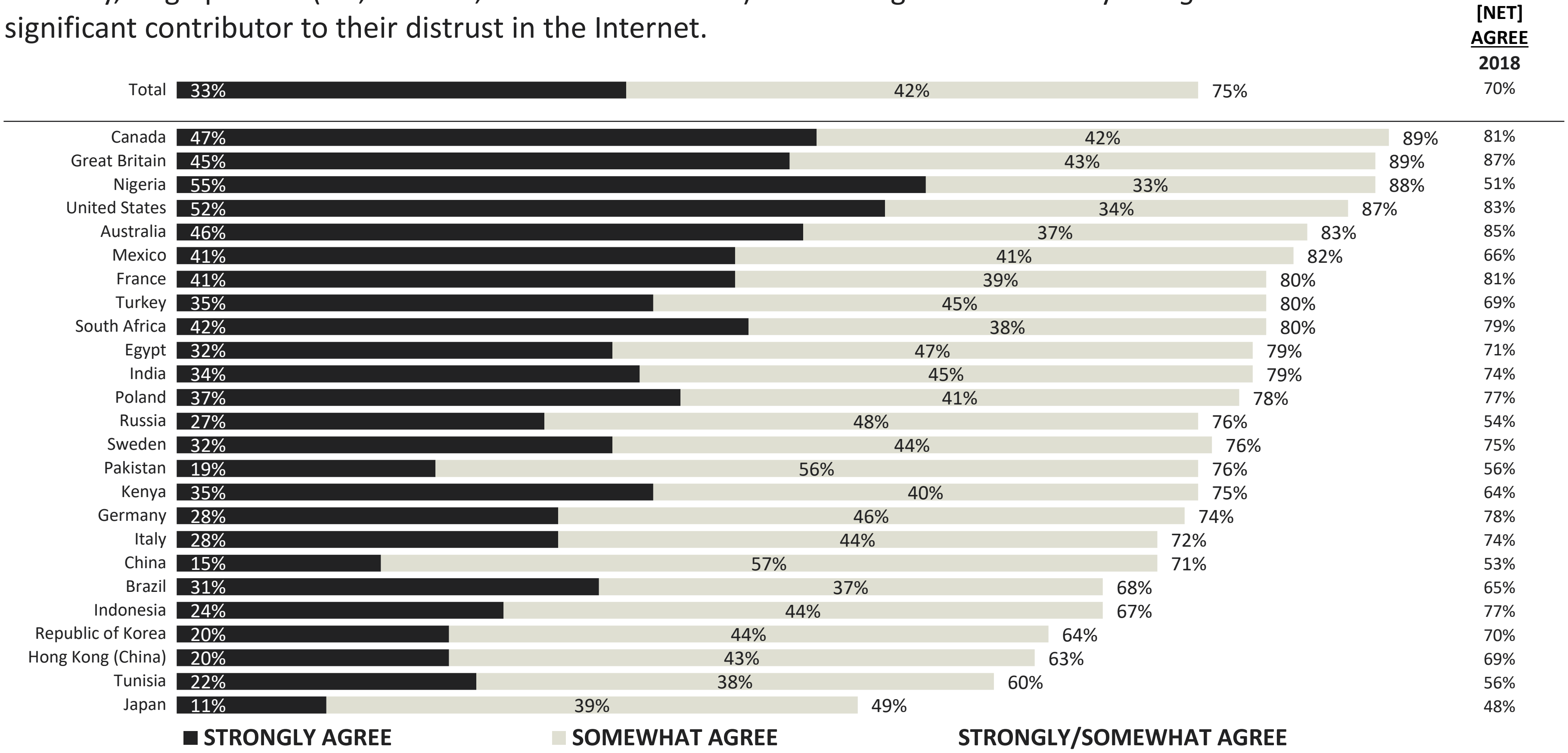
On balance, there has been an increase (+4 pts) in the incidence of global citizens who claim that foreign governments are contributing to their distrust of the Internet, led by citizens living in the Middle East & Africa (+11).



Q7. To what extent do the following contribute to your distrust in the Internet?
Base: All Respondents who do not completely trust the internet 2019 (n=6528); 2018 (n=6778) NOT ASKED IN CHINA

SOCIAL MEDIA COMPANIES

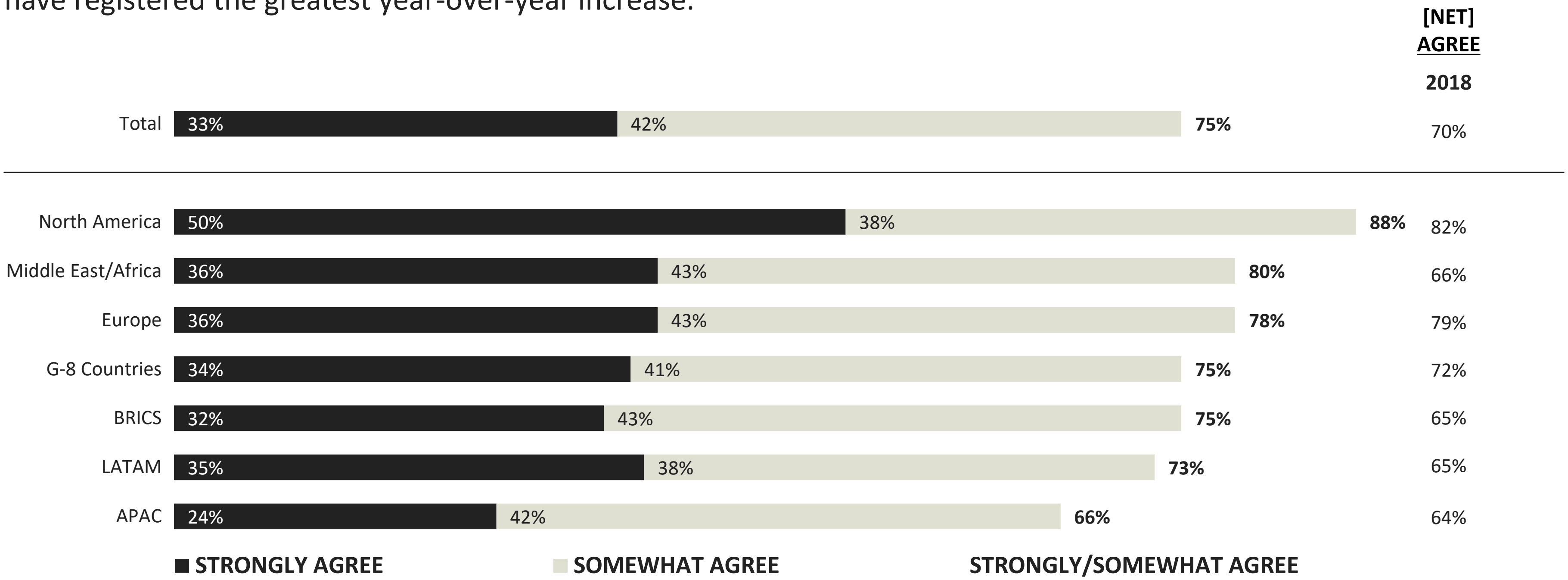
Similarly, anglophones (GB, Canada, the US & Australia) are among the most likely to *agree* that social media is a significant contributor to their distrust in the Internet.



Q7. To what extent do the following contribute to your distrust in the Internet?
Base: All Respondents who do not completely trust the internet 2019 (n=6608); 2018 (n=6778)

SOCIAL MEDIA COMPANIES

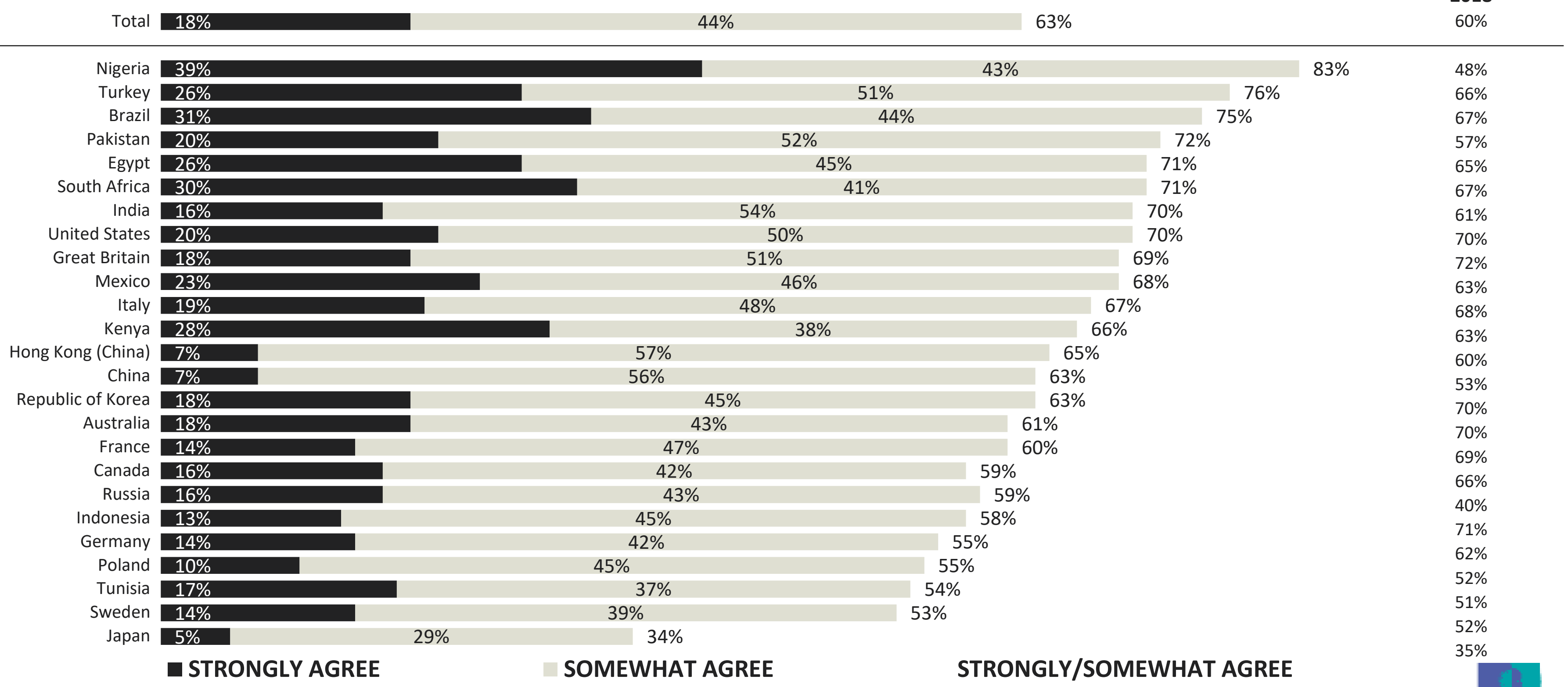
Almost nine in ten (88%) North Americans who distrust the Internet *agree* that social media is responsible for this distrust, far and away the highest proportion out of all regions surveyed. However, the Middle East & Africa (+14 pts) have registered the greatest year-over-year increase.



Q7. To what extent do the following contribute to your distrust in the Internet?
Base: All Respondents who do not completely trust the internet 2019 (n=6608); 2018 (n=6778)

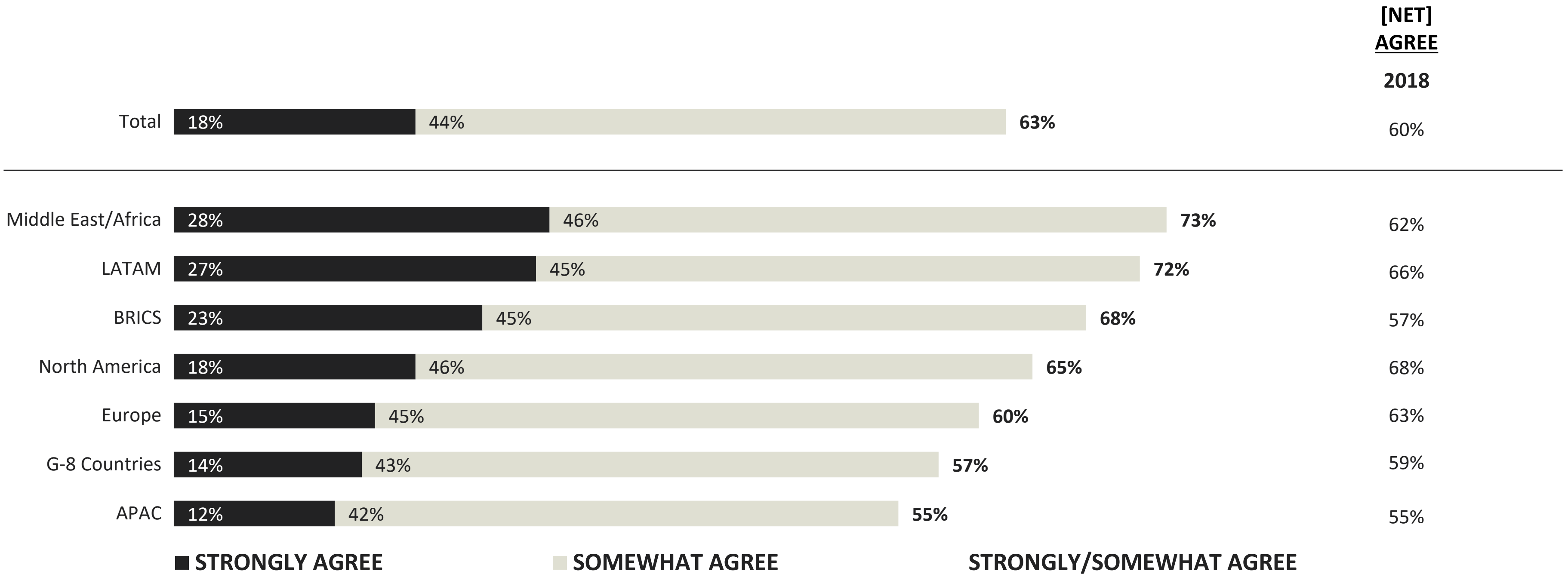
INTERNET SERVICE PROVIDERS

Two-thirds (63%) of those who distrust the Internet *agree* that service providers are a source distrust. Somewhat interestingly, Japanese are half as likely (at 34%), compared to the global average, to *agree* that service providers contribute to distrust.



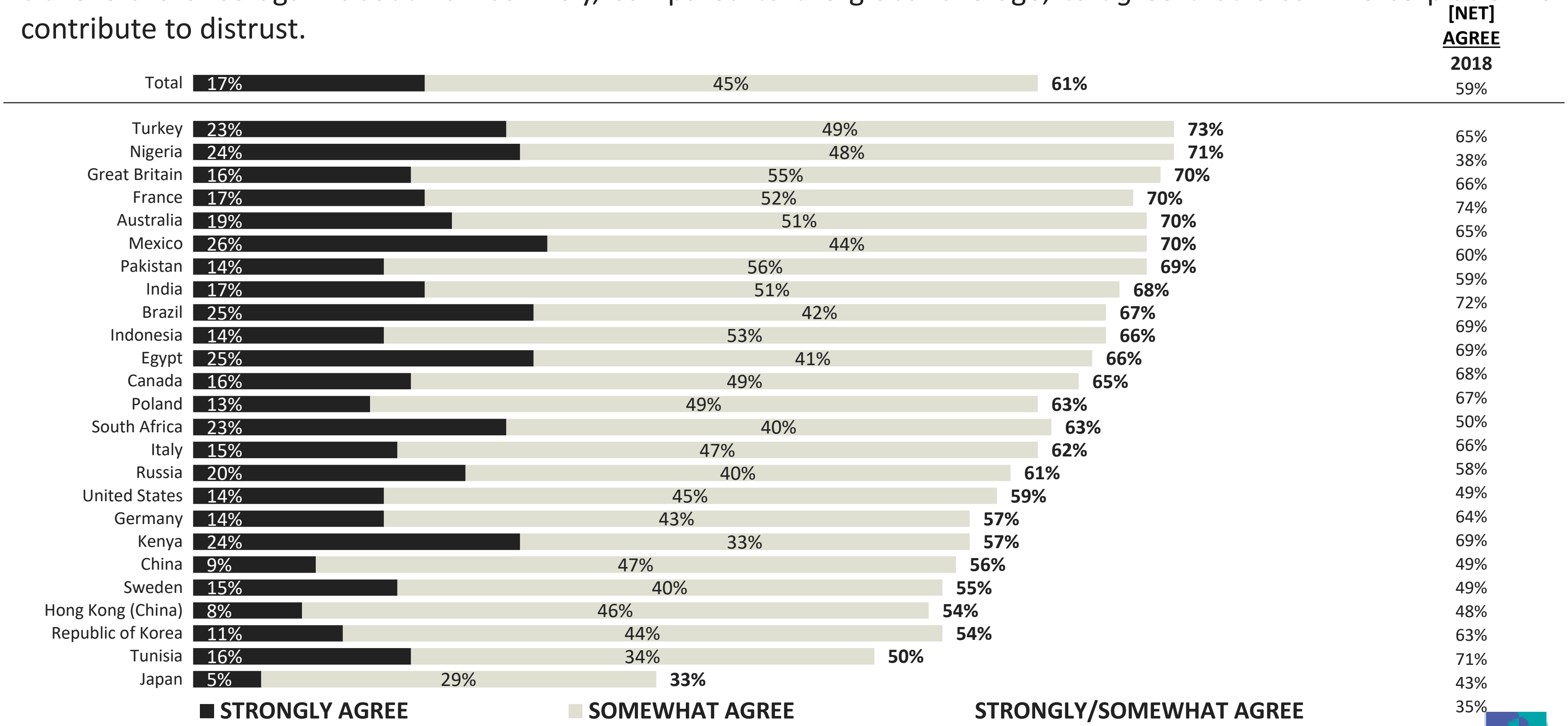
Q7. To what extent do the following contribute to your distrust in the Internet?
Base: All Respondents who do not completely trust the internet 2019 (n=6608); 2018 (n=6778)

Since 2018, the incidence of citizens living in the BRICS (+11 pts), Middle Eastern & African (+11) economies citing Internet service providers as sources of distrust has increased the most.



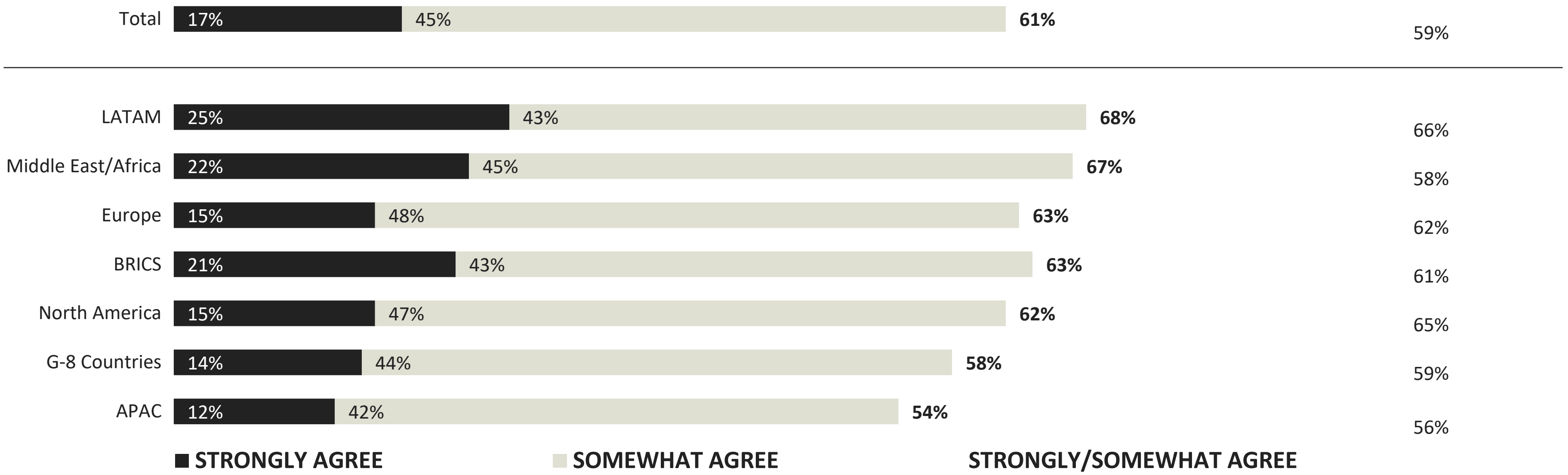
Q7. To what extent do the following contribute to your distrust in the Internet?
Base: All Respondents who do not completely trust the internet 2019 (n=6608); 2018 (n=6778)

A majority (61%) who distrust the Internet *agree* that e-commerce platforms are a contributor. At 33%, Japanese citizens are once again about half as likely, compared to the global average, to *agree* that e-commerce platforms contribute to distrust.



Q7. To what extent do the following contribute to your distrust in the Internet?
Base: All Respondents who do not completely trust the internet 2019 (n=6608); 2018 (n=6778)

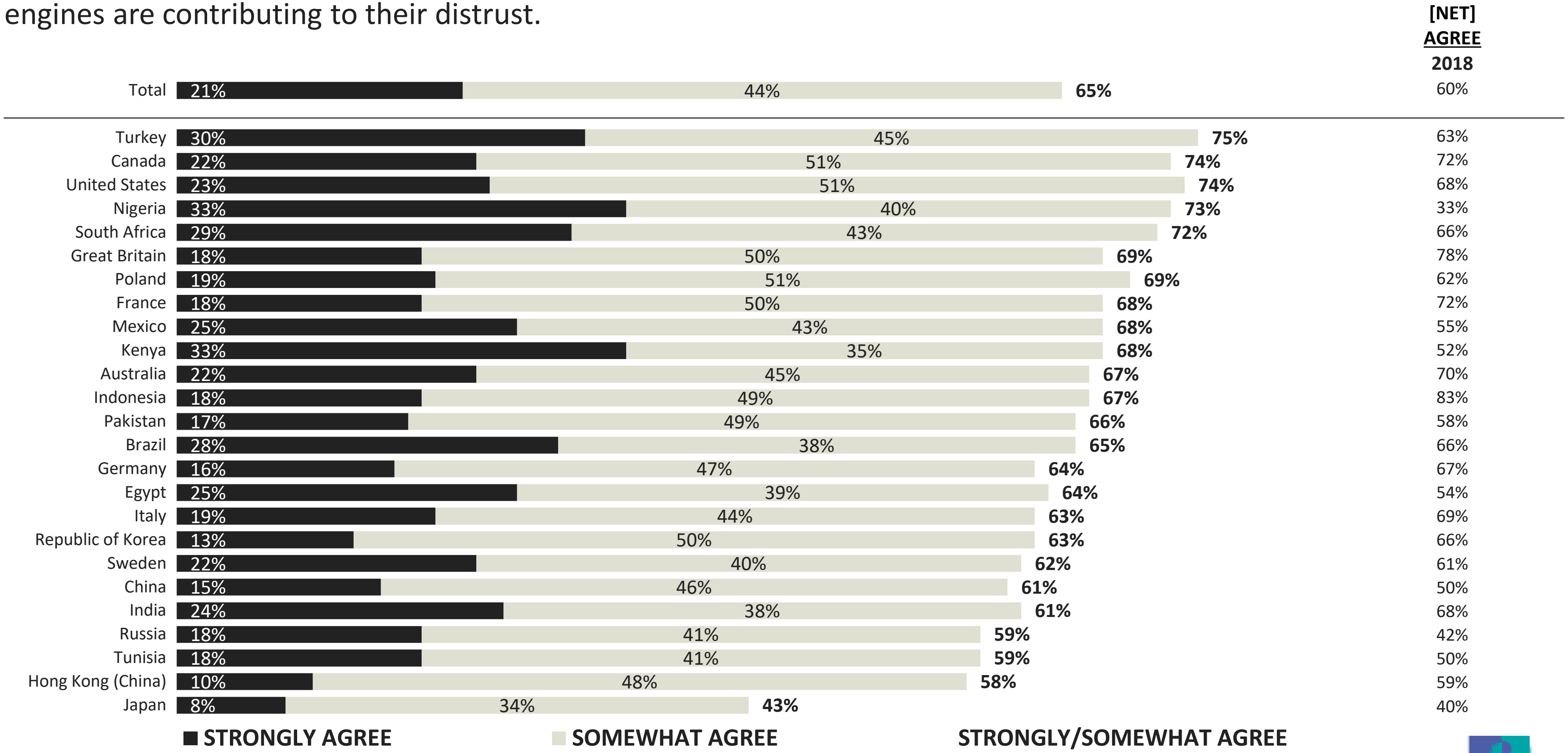
Distrust with respect to e-commerce platforms has increased the most, year-over-year, in the Middle Eastern & African economies (+9 pts).



	STRONGLY AGREE	SOMEWHAT AGREE	STRONGLY/SOMEWHAT AGREE	[NET] AGREE 2018
Total	17%	45%	61%	59%
LATAM	25%	43%	68%	66%
Middle East/Africa	22%	45%	67%	58%
Europe	15%	48%	63%	62%
BRICS	21%	43%	63%	61%
North America	15%	47%	62%	65%
G-8 Countries	14%	44%	58%	59%
APAC	12%	42%	54%	56%

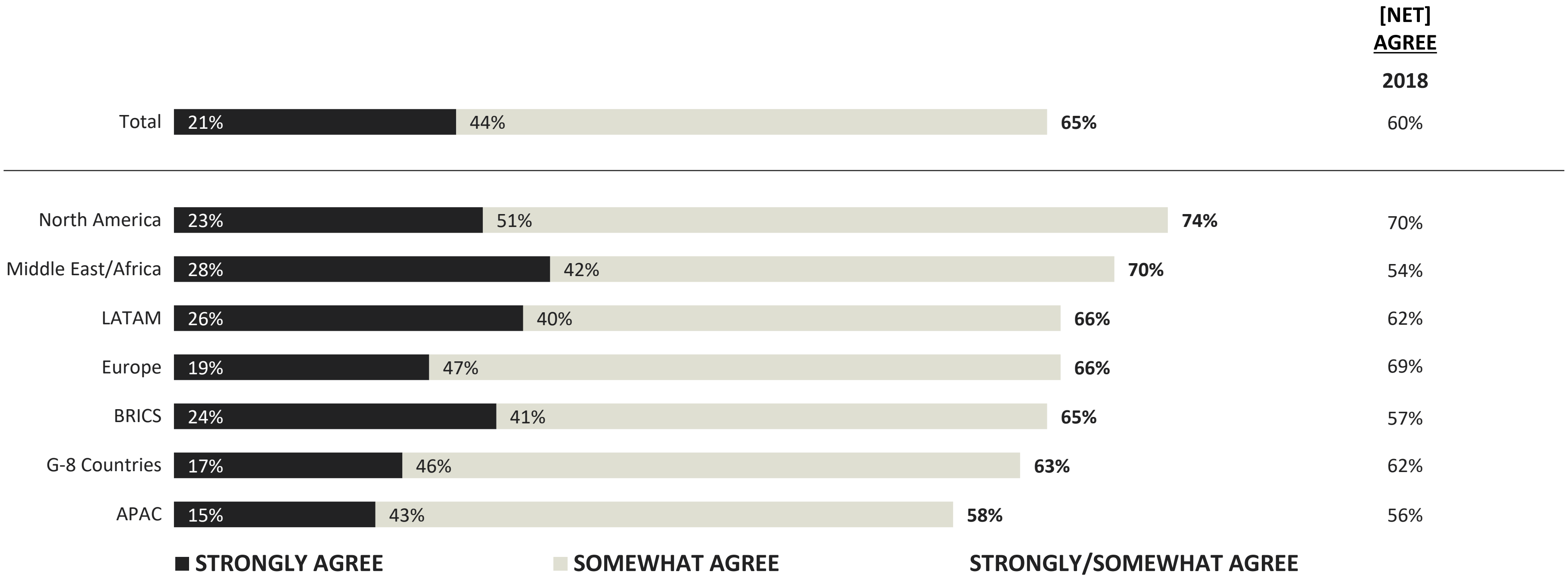
Q7. To what extent do the following contribute to your distrust in the Internet?
Base: All Respondents who do not completely trust the internet 2019 (n=6608); 2018 (n=6778)

Relative to 2018, more than twice as many Nigerians (73%; +40 pts) who distrust the Internet *agree* that search engines are contributing to their distrust.



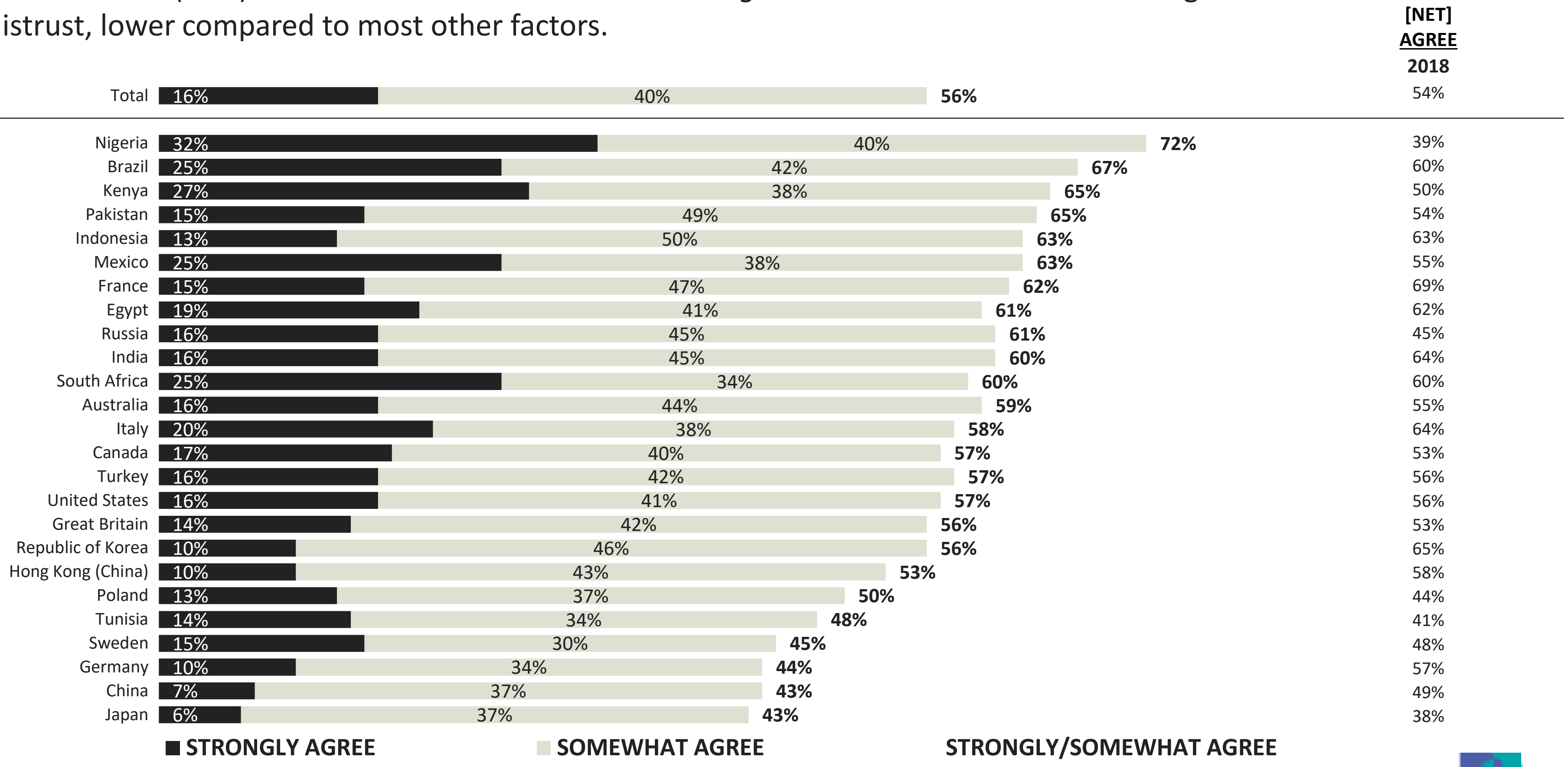
Q7. To what extent do the following contribute to your distrust in the Internet?
Base: All Respondents who do not completely trust the internet 2019 (n=6608); 2018 (n=6778)

Overall, significantly more in all regions, save for Europe (-3 pts), *agree* that search engines have contributed to their distrust in the Internet.



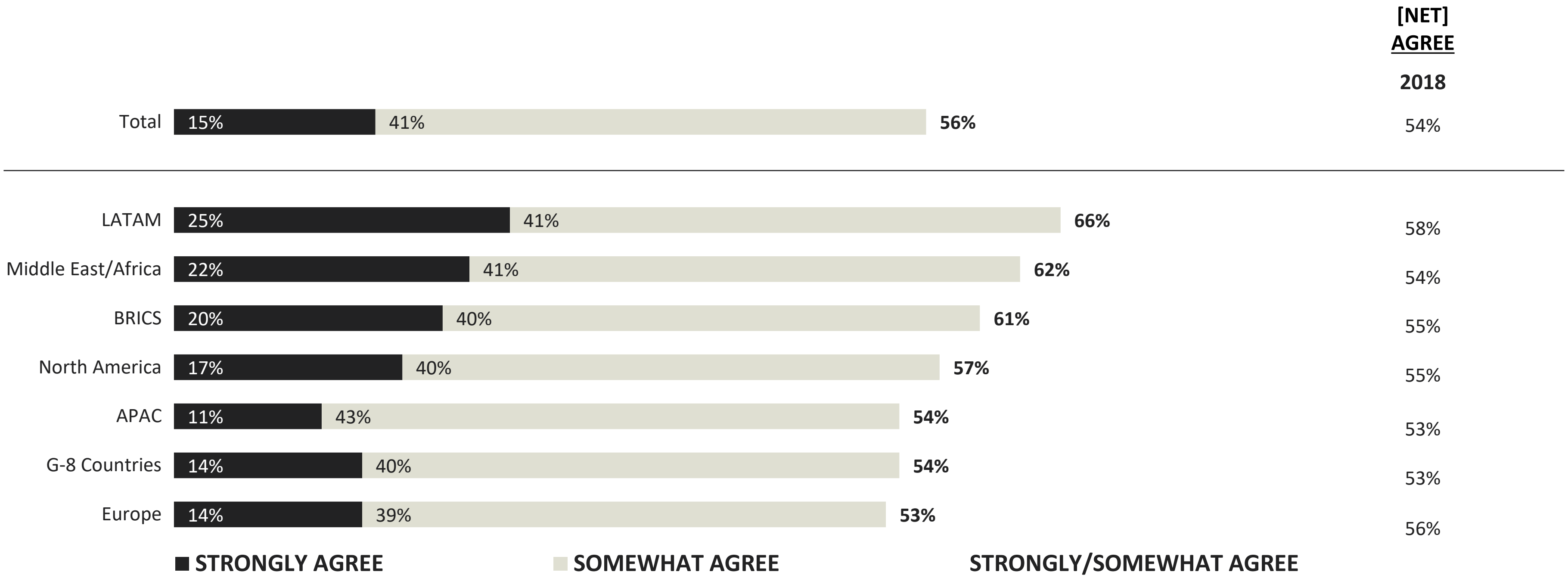
Q7. To what extent do the following contribute to your distrust in the Internet?
Base: All Respondents who do not completely trust the internet 2019 (n=6608); 2018 (n=6778)

Just over half (56%) of those who distrust the Internet *agree* that online & mobile banking has contributed to their distrust, lower compared to most other factors.



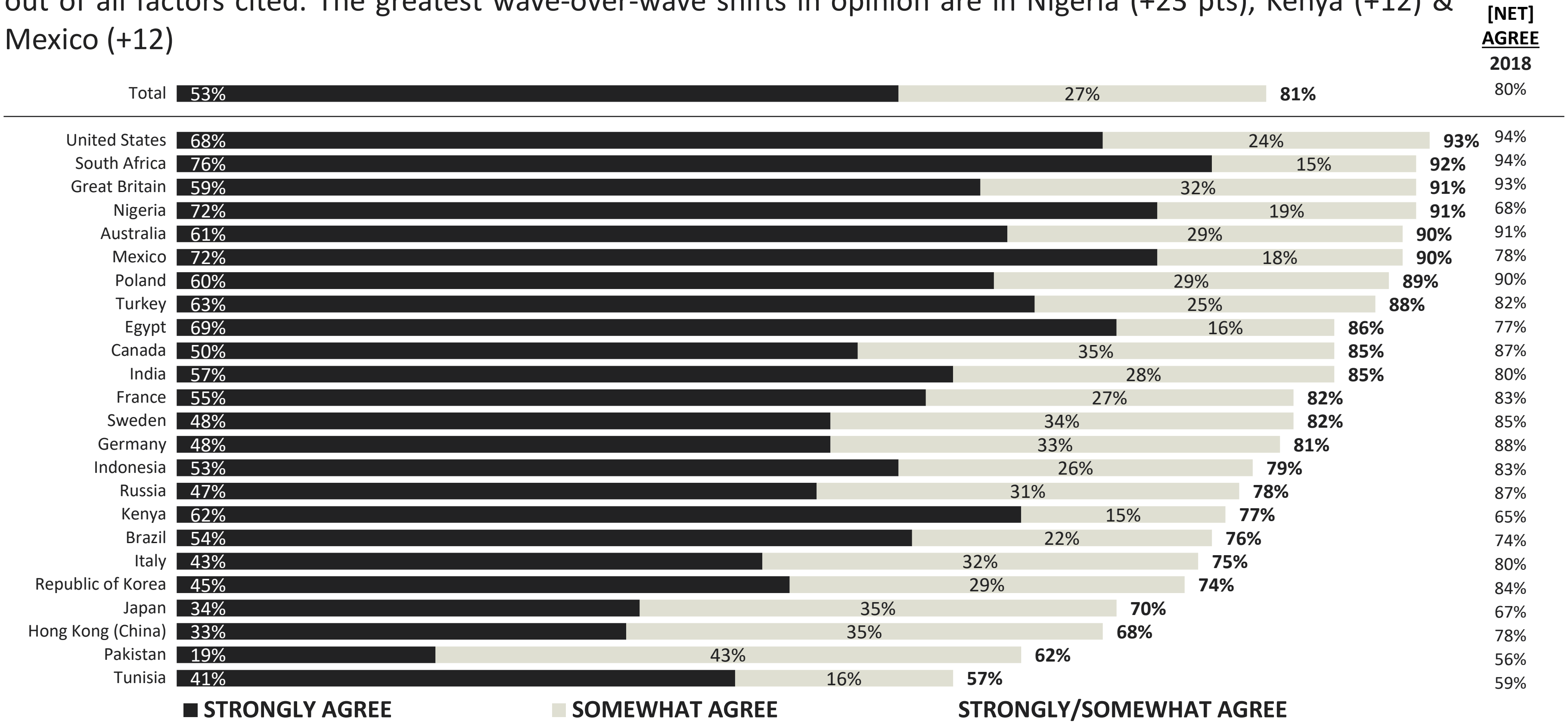
Q7. To what extent do the following contribute to your distrust in the Internet?
Base: All Respondents who do not completely trust the internet 2019 (n=6608); 2018 (n=6778)

Wave-over-wave, more in each of the regional economies, save for Europe (-3 pts), *agree* that online & mobile banking platforms have contributed to their distrust.



CYBER CRIMINALS

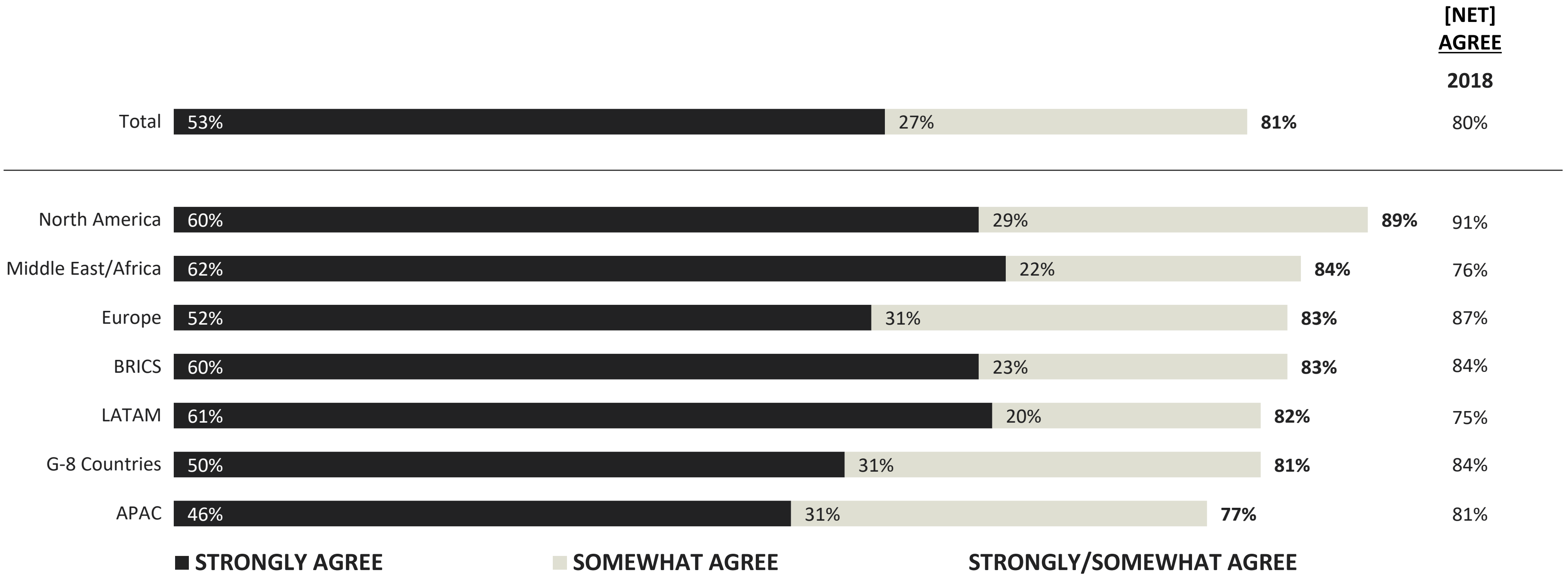
Four in five (81%) *agree* that cyber criminals are contributing to their distrust in the Internet, by far the most out of all factors cited. The greatest wave-over-wave shifts in opinion are in Nigeria (+23 pts), Kenya (+12) & Mexico (+12)



Q7. To what extent do the following contribute to your distrust in the Internet?
Base: All Respondents who do not completely trust the internet 2019 (n=6528); 2018 (n=6778) NOT ASKED IN CHINA

CYBER CRIMINALS

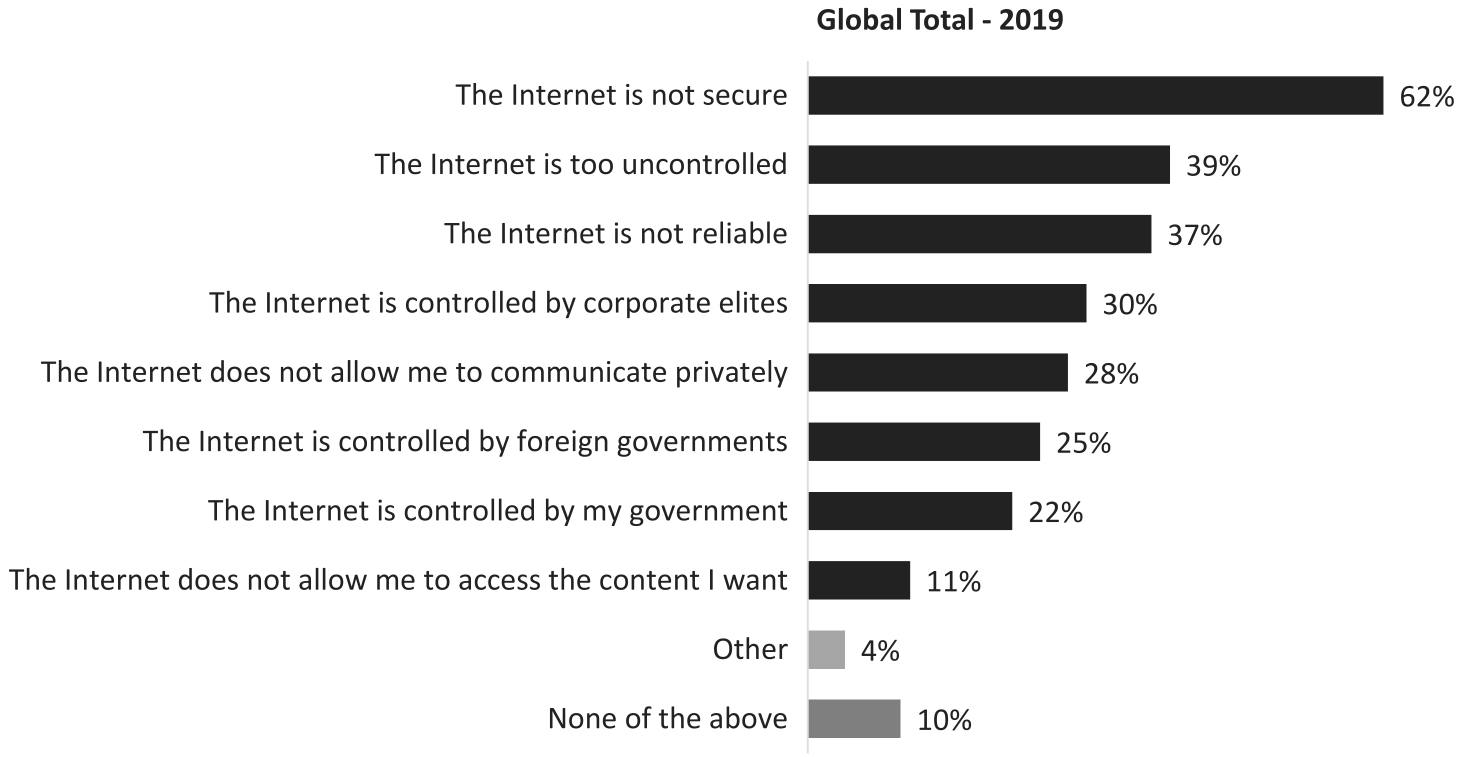
Outside of LATAM (+7 pts), the Middle East & Africa (+8 pts), there is generally a reduced tendency to blame cyber criminals for Internet distrust.



Q7. To what extent do the following contribute to your distrust in the Internet?
Base: All Respondents who do not completely trust the internet 2019 (n=6528); 2018 (n=6778)

Other Reasons For Distrust

Three in five (62%) global citizens who distrust the Internet indicate that they feel this way because the Internet is not secure.

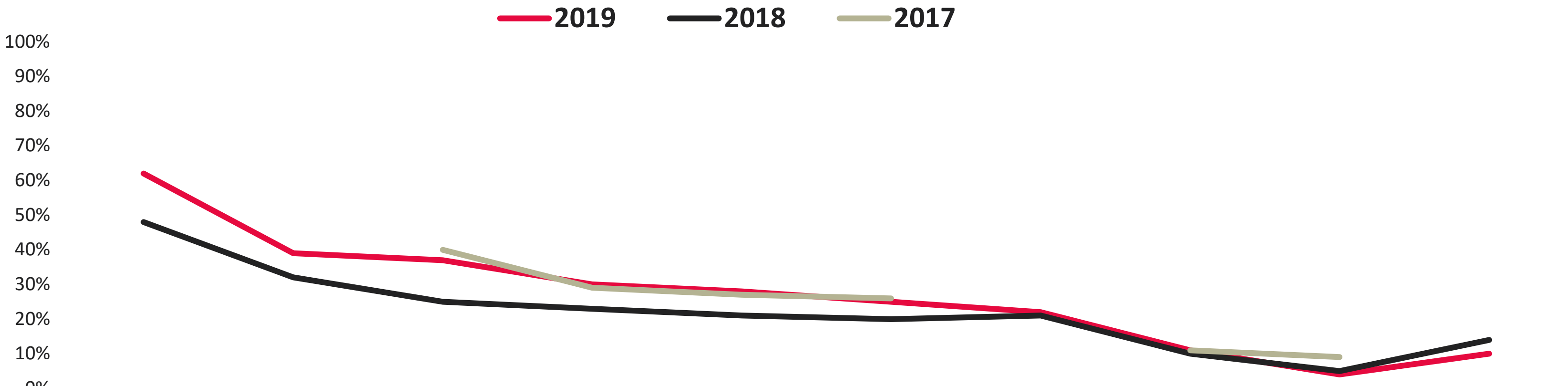


Q8. Why else do you distrust the Internet?
Base: Those Who Distrust Internet 2019 (n=6608); 2018 (n=21,081); 2017 (n=10,168)

Other Reasons For Distrust

Relative to 2018, there has been a sharp increase in the proportion who cite a lack of security (+14 pts) & reliability (+12) as other reasons for distrusting the Internet.

Tracking – GLOBAL TOTAL



	The Internet is not secure	The Internet is too uncontrolled	The Internet is not reliable	The Internet is controlled by corporate elites	The Internet does not allow me to communicate privately	The Internet is controlled by foreign governments	The Internet is controlled by my government	The Internet does not allow me to access the content I want	Other	None of the above
2019	62%	39%	37%	30%	28%	25%	22%	11%	4%	10%
2018	48%	32%	25%	23%	21%	20%	21%	10%	5%	14%
2017	65%	n/a	40%	29%	27%	26%	n/a	11%	9%	n/a

Q8. Why else do you distrust the Internet?
Base: Those Who Distrust Internet 2019 (n=6608); 2018 (n=21,081); 2017 (n=10,168)

Other Reasons For Distrust – By Regional Economy

When it comes to other reasons for distrust, there is considerable regional variation in opinion.

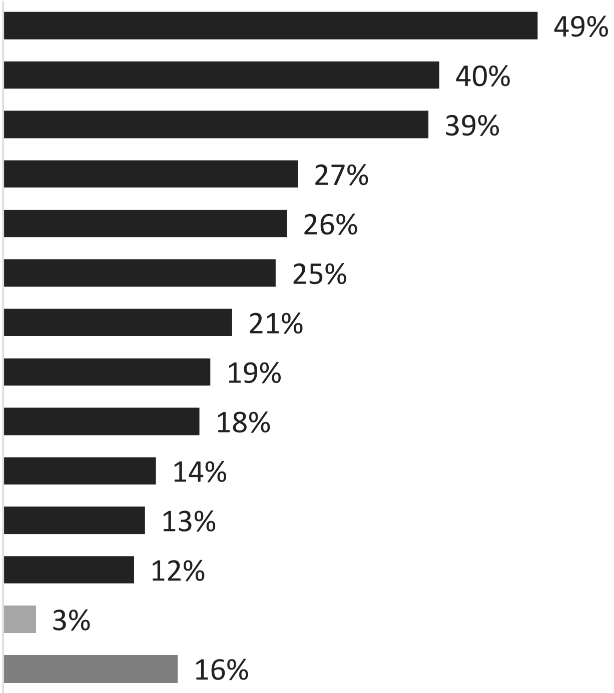
					REGIONS			
	Total	**North America**	**LATAM**	**Europe**	**APAC**	**G-8 Countries**	**BRICS**	**Middle East/Africa**
Base: All Respondents	*n=6608*	*n=644*	*n=406*	*n=1812*	*n=1891*	*n=2643*	*n=959*	*n=1533*
The Internet is not secure	62%	69%	61%	54%	61%	57%	63%	63%
The Internet is too uncontrolled	39%	29%	35%	36%	38%	37%	40%	42%
The Internet is not reliable	37%	28%	48%	32%	32%	28%	42%	42%
The Internet is controlled by corporate elites	30%	35%	22%	31%	23%	27%	30%	29%
The Internet does not allow me to communicate privately	28%	31%	34%	33%	20%	27%	34%	20%
The Internet is controlled by foreign governments	25%	18%	22%	21%	17%	19%	24%	33%
The Internet is controlled by my government	22%	24%	17%	20%	20%	20%	26%	20%
The Internet does not allow me to access the content I want	11%	4%	7%	6%	11%	5%	14%	14%
Other	4%	6%	2%	4%	3%	4%	4%	6%
None of the above	10%	8%	5%	12%	12%	14%	6%	7%

Q8. Why else do you distrust the Internet?
Base: Those Who Distrust Internet 2019 (n=6608)

Ways Lack of Distrust Has Changed Internet Behaviour

About half (49%) of those who distrust the Internet indicate that this distrust has compelled them to disclose less personal information online, a figure which marks a significant increase over 2018 (+6 pts) and is on par with 2017.

Global Total - 2019



	Global Total - 2019	2018	2017
Disclose less personal information online	49%	43%	49%
Take greater care to secure your device	40%	38%	40%
Use the Internet more selectively	39%	35%	40%
Self-censor what you say online	27%	24%	29%
Limit the type of online applications you use	26%	20%	23%
Limit the number of online applications you use	25%	22%	26%
Limit how much you use online applications	21%	17%	20%
Use more encryption	19%	19%	20%
Make fewer online purchases	18%	15%	19%
Use more false personal information online	14%	12%	14%
Use the Internet less often	13%	9%	12%
Use technological tools (e.g. VPN or Tor)	12%	13%	11%
Other	3%	2%	3%
None of the above	16%	18%	14%

Q9. How has your lack of trust in the Internet caused you to use the Internet differently?
Base: Those Who Distrust Internet 2019 (n=6608); 2018 (n=20,896); 2017 (n=10,168)

Ways Lack of Distrust Has Changed Internet Behaviour – By Regional Economy

Distrusting citizens who live in developing economies tend to be more likely to have made each of the behavioural changes, with respect to Internet usage.

		REGIONS						
	Total	North America	LATAM	Europe	APAC	G-8 Countries	BRICS	Middle East/Africa
Base: All Respondents	*n=6608*	*n=644*	*n=406*	*n=1812*	*n=1891*	*n=2643*	*n=959*	*n=1533*
Disclose less personal information online	49%	53%	53%	41%	47%	41%	57%	50%
Take greater care to secure your device	40%	45%	41%	32%	34%	32%	44%	44%
Use the Internet more selectively	39%	42%	50%	32%	34%	32%	49%	42%
Self-censor what you say online	27%	35%	24%	19%	24%	22%	32%	30%
Limit the type of online applications you use	26%	28%	27%	19%	20%	19%	31%	29%
Limit the number of online applications you use	25%	28%	25%	20%	19%	19%	31%	29%
Limit how much you use online applications	21%	23%	20%	16%	17%	16%	25%	21%
Use more encryption	19%	16%	17%	12%	18%	11%	22%	24%
Make fewer online purchases	18%	18%	19%	12%	13%	13%	23%	24%
Use more false personal information online	14%	17%	10%	14%	12%	12%	14%	14%
Use the Internet less often	13%	11%	13%	10%	10%	8%	12%	18%
Use technological tools (e.g. VPN or Tor)	12%	10%	11%	10%	11%	9%	18%	16%
Other	3%	4%	1%	2%	3%	3%	3%	4%
None of the above	16%	15%	8%	23%	21%	26%	9%	9%

Q9. How has your lack of trust in the Internet caused you to use the Internet differently?
Base: Those Who Distrust Internet 2019 (n=6608)

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