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Global Survey on Internet Security and Trust

- April 16, 2018

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Methodology

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Methdology, Part 1

- This survey was conducted by Ipsos on behalf of the Centre for International Governance Innovation (CIGI), the United Nations Conference on Trade and Development (UNCTAD) and the Internet Society (ISOC) between December 29, 2017, and March 5, 2018.
- The survey was conducted in 25 economies—Australia, Brazil, Canada, China, Egypt, France, Germany, Great Britain, Hong Kong, India, Indonesia, Italy, Japan, Kenya, Mexico, Nigeria, Pakistan, Poland, Russia, South Africa, Republic of Korea, Sweden, Tunisia, Turkey and the United States—and involved 25,262 Internet users.
- Twenty-one of the economies utilized the Ipsos Internet panel system while Tunisia was conducted via CATI, and Kenya, Nigeria and Pakistan utilized face-to-face interviewing, given online constraints in these economies and the length of the poll. The inclusion of Russia is new to this year's poll.

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Methdology, Part 2

- In the US and Canada respondents were aged 18-64, and 16-64 in all other economies.
- For 2018, the economies of Russia and South Africa have been added to the BRICS definition, which previously only included Brazil, India, and China (BIC). For analytic 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 those surveys conducted by CATI and face-to-face, 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

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Privacy and Security

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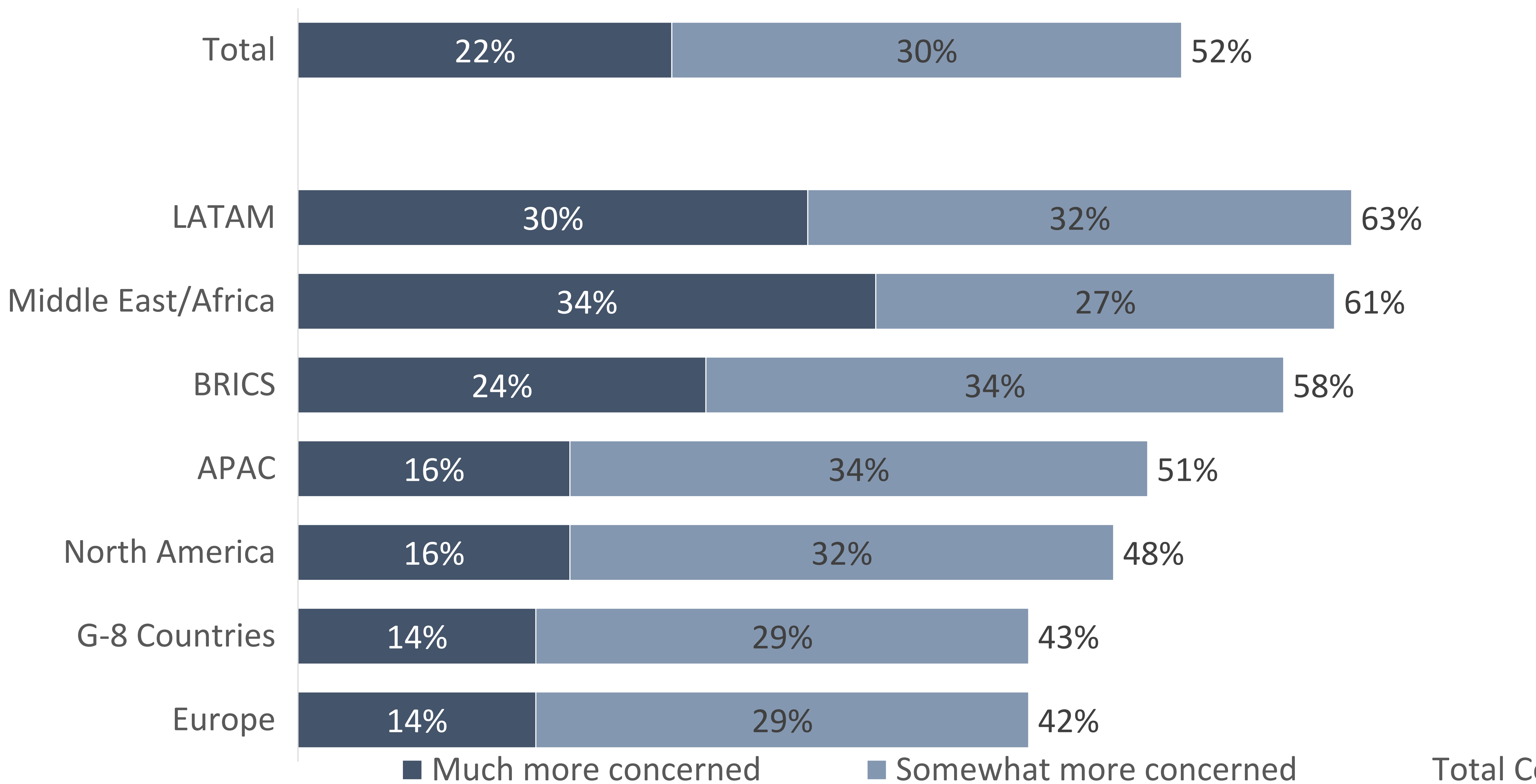
Across most economies, fewer say they are more concerned about online privacy than said so last year, led by a decline in APAC (51%, down 9 points)



TOTAL CONCERNED

2017	2016	2014
55%	57%	64%
64%	63%	81%
55%	60%	69%
63%	64%	76%
60%	59%	67%
56%	53%	59%
51%	52%	56%
49%	50%	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)

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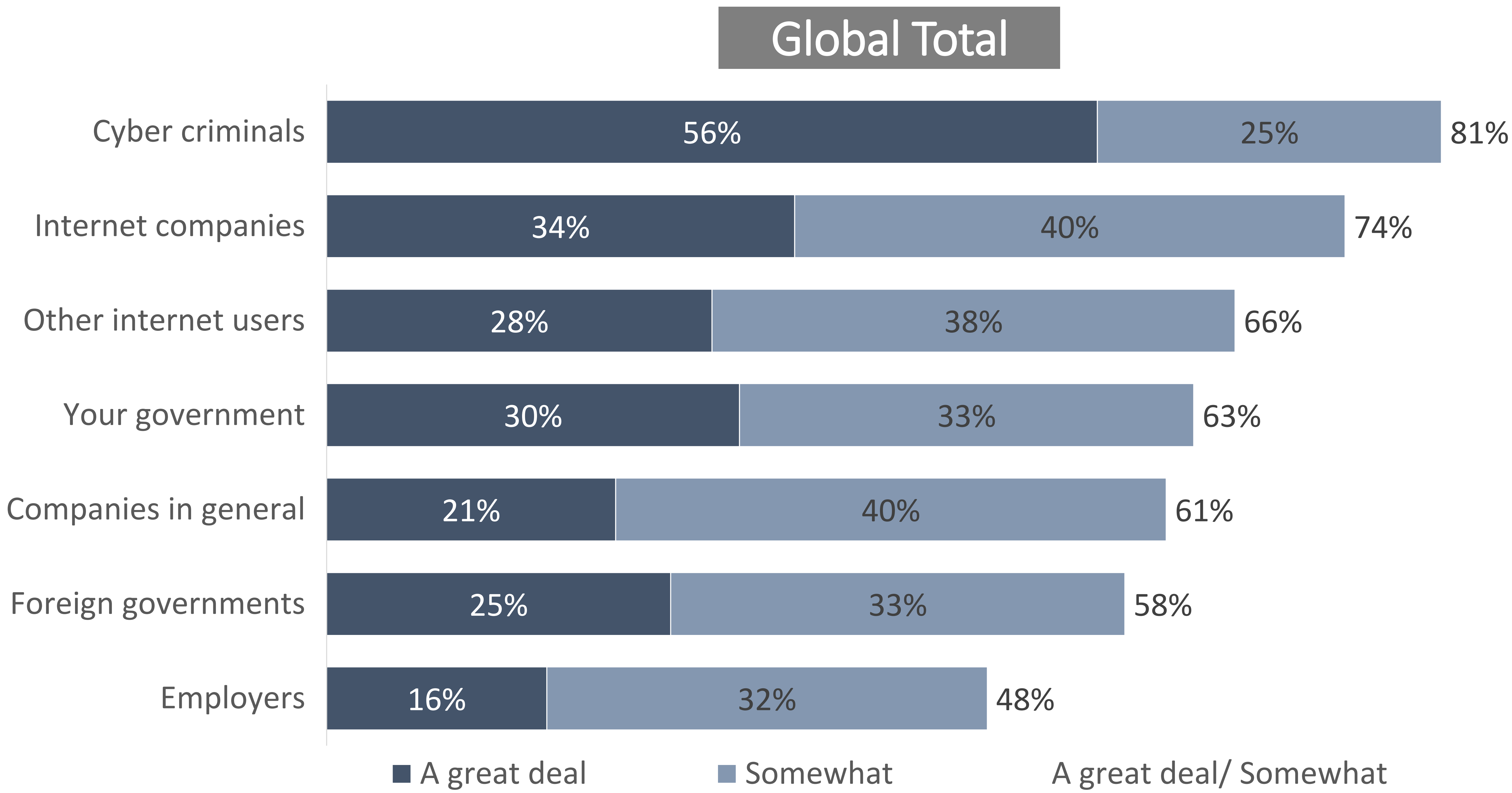
Among those more concerned, cyber criminals & internet companies continue to be primary sources of concern, with the relative positioning of these sources largely unchanged since last year.



A Great Deal / Somewhat

	2017	**2016**
Cyber criminals	82%	79%
Internet companies	74%	72%
Other internet users	67%	66%
Your government	65%	60%
Companies in general	62%	-
Foreign governments	61%	57%
Employers	49%	48%

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

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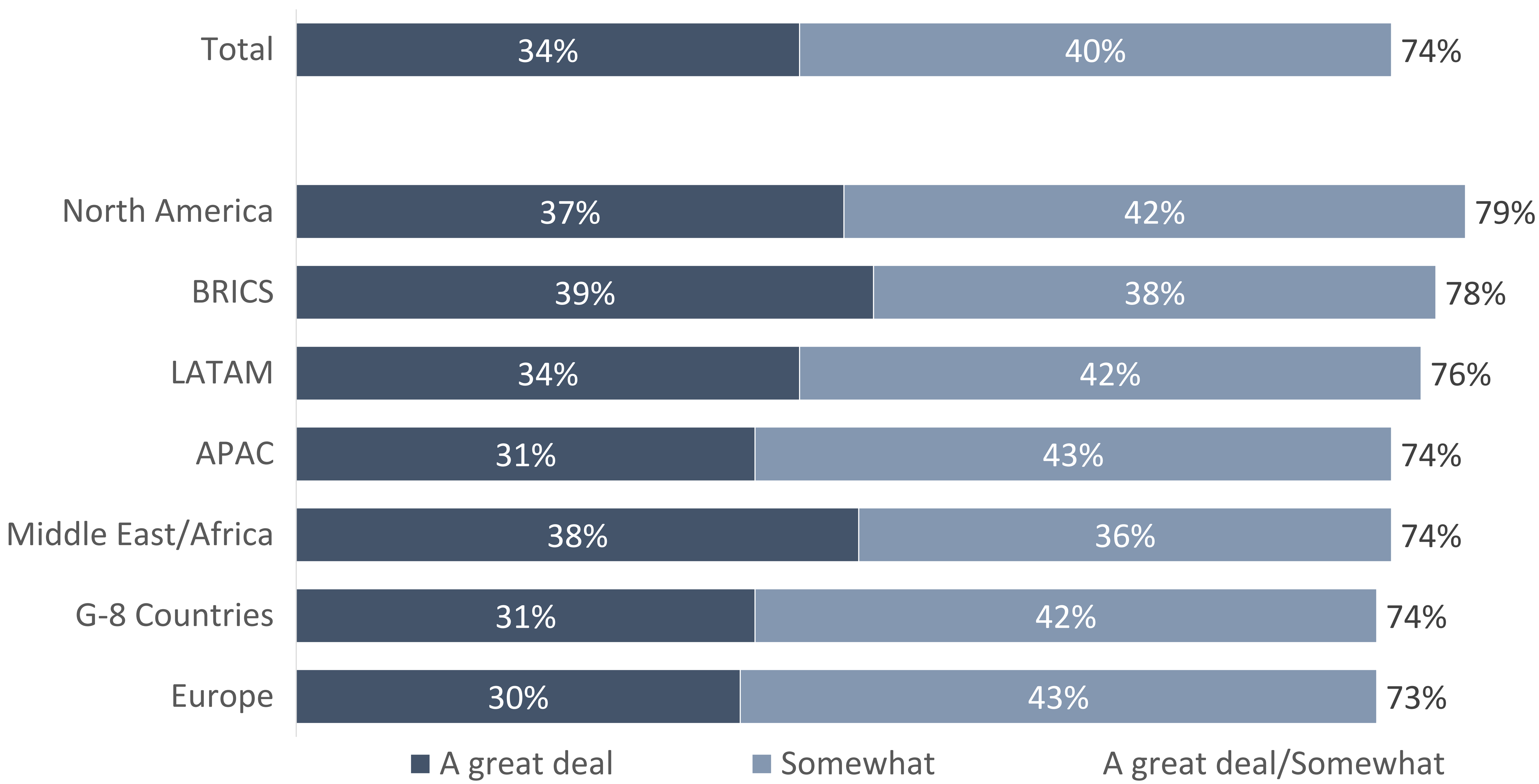
Internet companies are a relatively stable source of concern, although significantly more North Americans (+5 points) say these companies are a source of concern.



A Great Deal / Somewhat

	2017	**2016**
Total	74%	72%
North America	74%	74%
BRICS	74%	75%
LATAM	73%	75%
APAC	76%	76%
Middle East/Africa	74%	70%
G-8 Countries	73%	72%
Europe	70%	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: Much/ Somewhat More Concerned About Online Privacy 2016 (n=13,867); 2017 (n=12,956); 2018 (n=12,956)

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Latin American Economies tend to avoid certain web applications most, while North Americans and the Middle East and North African economies tend to be most likely to self-censor what they say online

	Total	North America	LATAM	Europe	APAC	G-8 Countries	BRICS	Middle East/Africa
Base: All Respondents	*n=24,750*	*n=2,001*	*n=2,001*	*n=6,048*	*n=8,072*	*n=8,048*	*n=4,049*	*n=5,775*
Avoiding opening emails from unknown email addresses	43%	42%	48%	41%	43%	40%	44%	37%
Avoiding certain Internet sites	36%	33%	48%	33%	31%	31%	40%	38%
Using antivirus software	36%	30%	49%	32%	39%	30%	47%	32%
Changing your password regularly	31%	29%	33%	26%	32%	26%	32%	33%
Avoiding certain web applications	30%	24%	37%	25%	27%	23%	34%	31%
Cutting down on the amount of biographically accurate information you divulge online	28%	22%	34%	25%	28%	22%	29%	24%
Self-censoring what you say online	20%	24%	19%	13%	20%	16%	18%	25%
Doing fewer financial transactions online	14%	11%	17%	9%	14%	9%	17%	15%
Changing who you communicate with	13%	12%	13%	8%	11%	8%	13%	15%
Making fewer on-line purchases	12%	11%	13%	9%	11%	9%	13%	13%
Closing Facebook and other social media accounts, etc.	10%	11%	9%	7%	9%	8%	11%	10%
Using the Internet less often	7%	6%	7%	4%	5%	4%	7%	11%
None of these	20%	28%	10%	26%	20%	30%	12%	18%

- 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 2018 (n=24,750)

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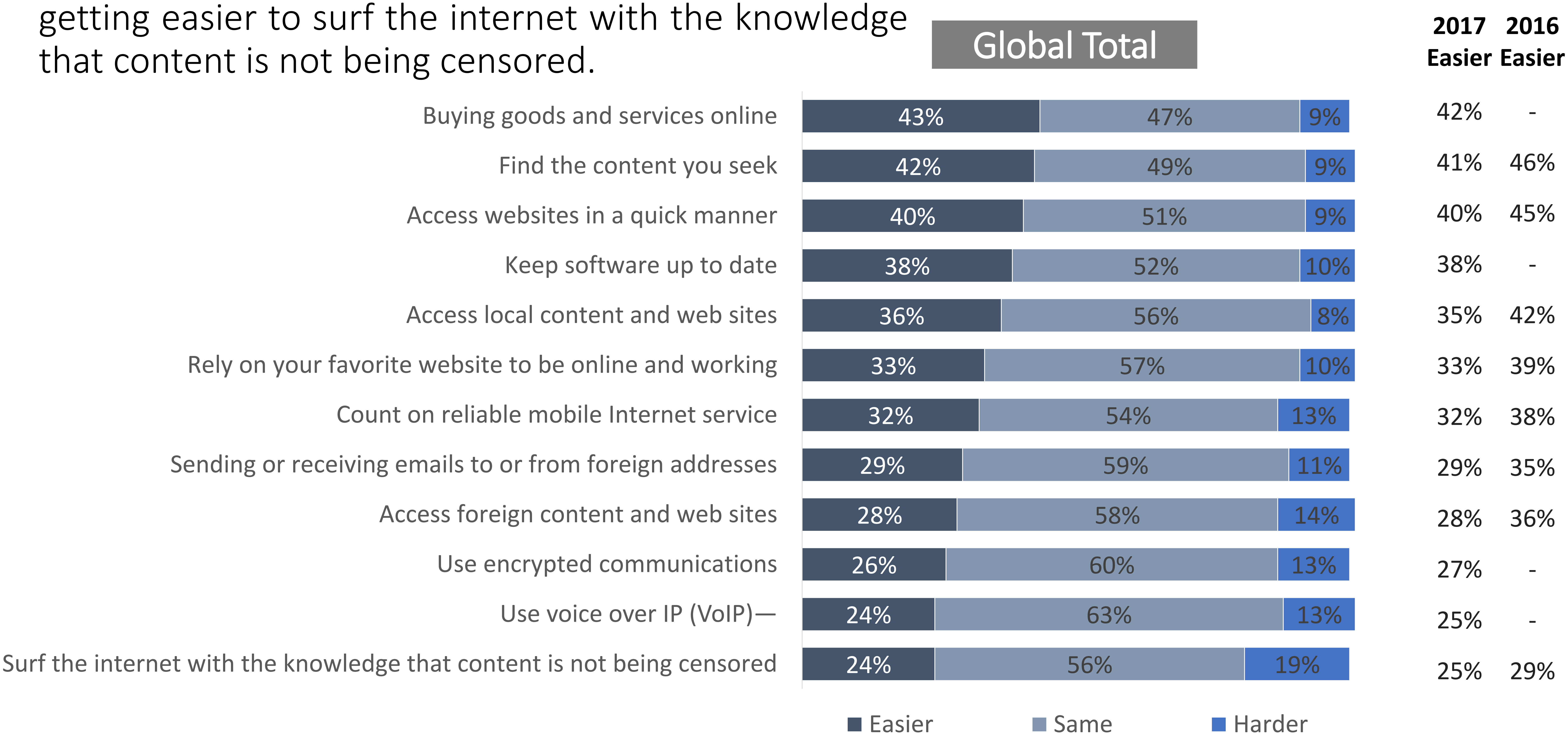
More say it is getting easier (43%), not harder (9%), to buy goods and services online. However, fewer say it's getting easier to surf the internet with the knowledge that content is not being censored.



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

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Trust

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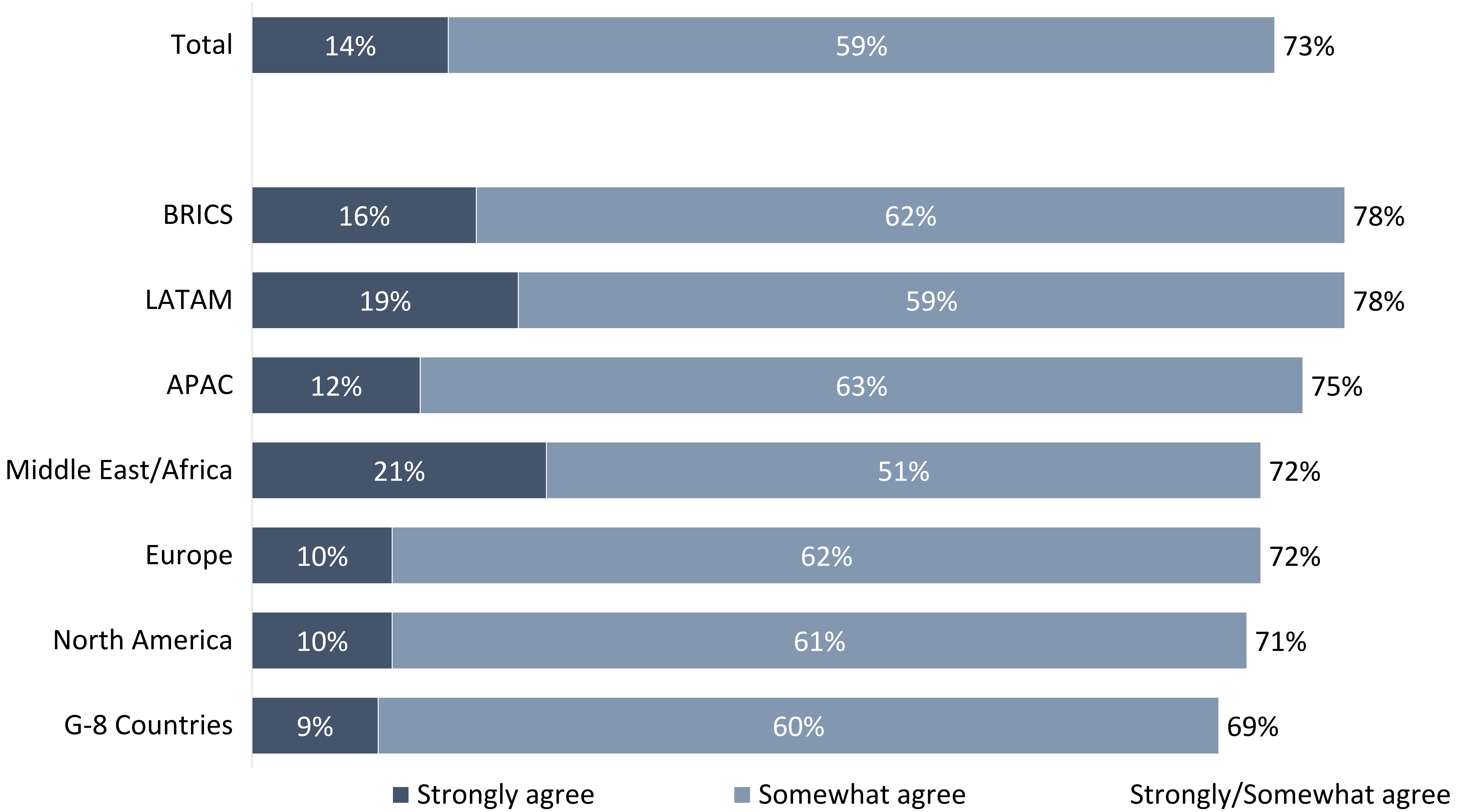
Overall, I trust the Internet— By Regional Economy



- Q7 To what extent do you agree or disagree with the following statements: Base: All Respondents 2018 (n=24,962); 2017 (n=24,225) BIC (not BRICS)

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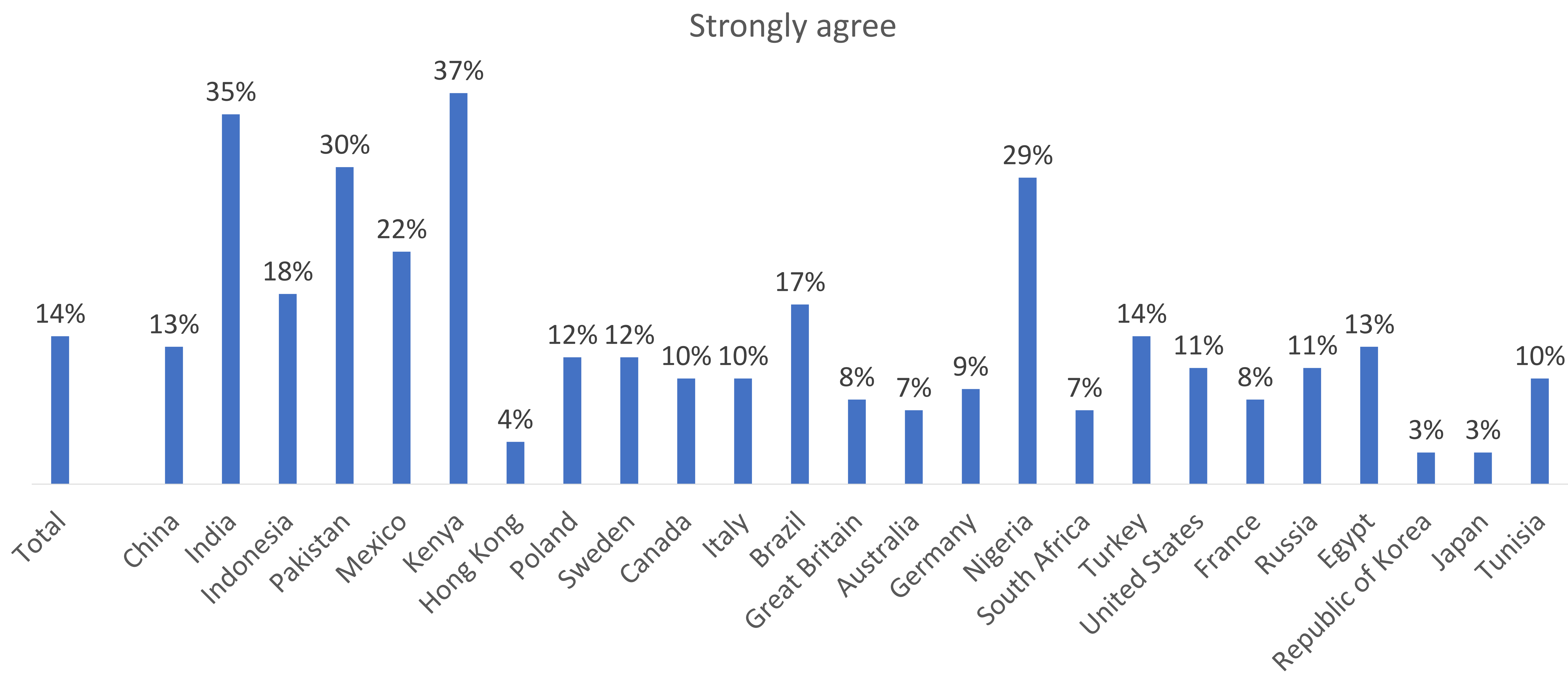
India, Pakistan, Kenya, Nigeria, Mexico, Indonesia and Brazil—emerging economies—have a very high number of respondents indicating that they ‘strongly agree’ that they trust the internet overall.



- Q7 To what extent do you agree or disagree with the following statements: Base: All Respondents 2018 (n=24,962); 2017 (n=24,225)

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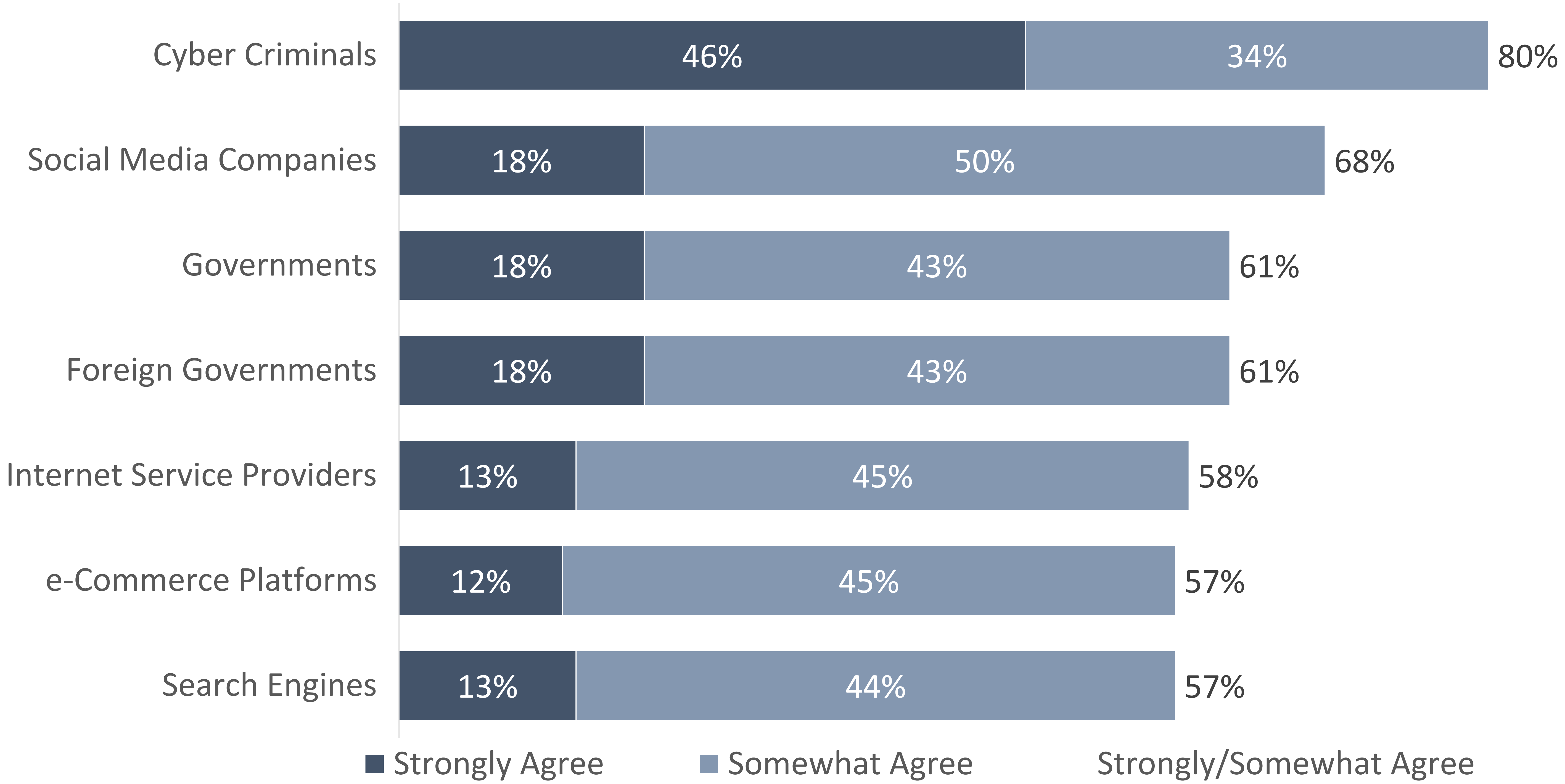
Cybercriminals contribute the most to the distrust of the internet. However, there is a lot of blame to go around, with a majority saying each of these entities at least somewhat contributes to distrust.



- Q8. To what extent do you agree or disagree that the following contribute to your distrust in the Internet? :
  Base: All Respondents who do not completely trust the internet (n=21,503)

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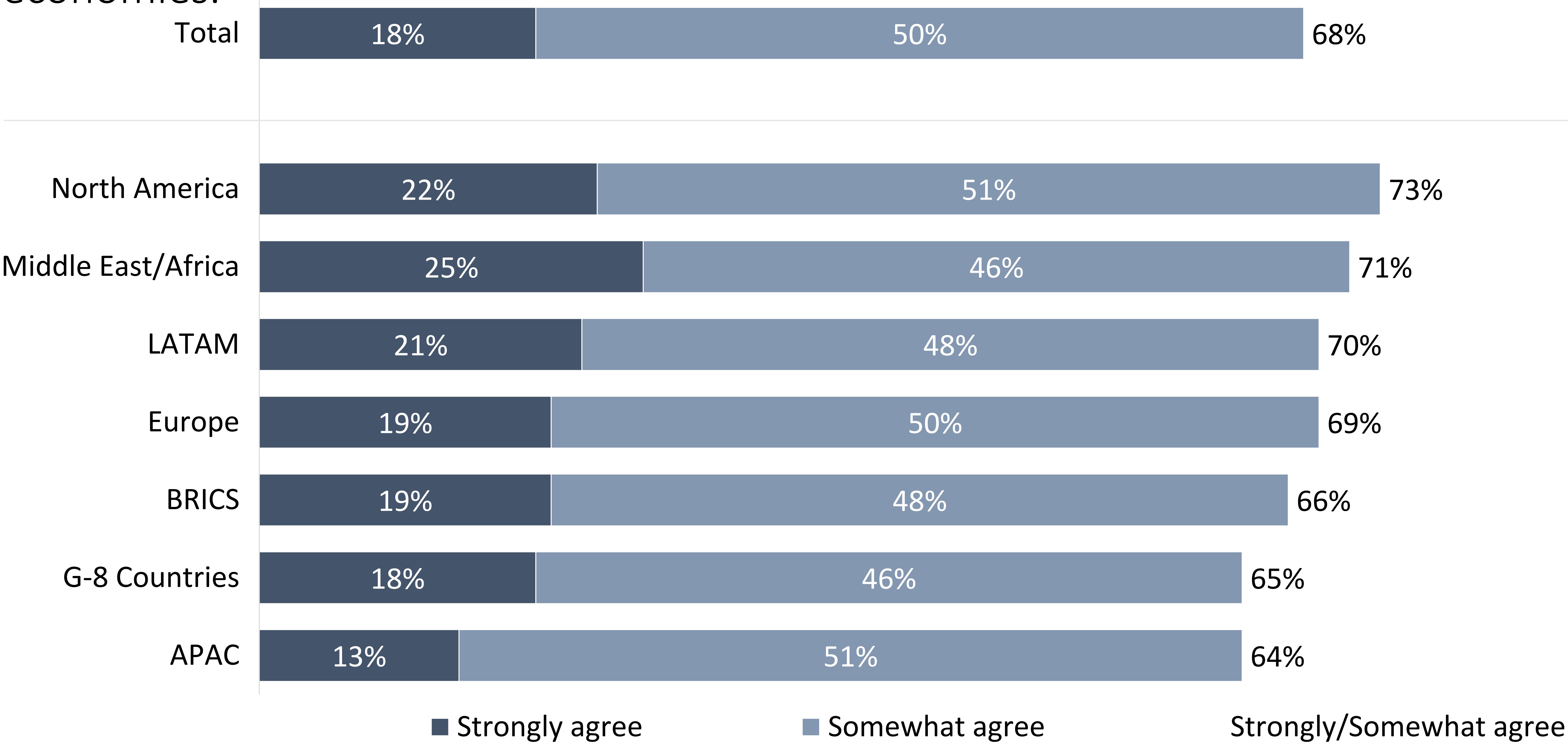
Social media companies are identified as a source of distrust the most in North America and the Middle East and Africa, with significantly lower levels in the BRICS and Asian Pacific economies.



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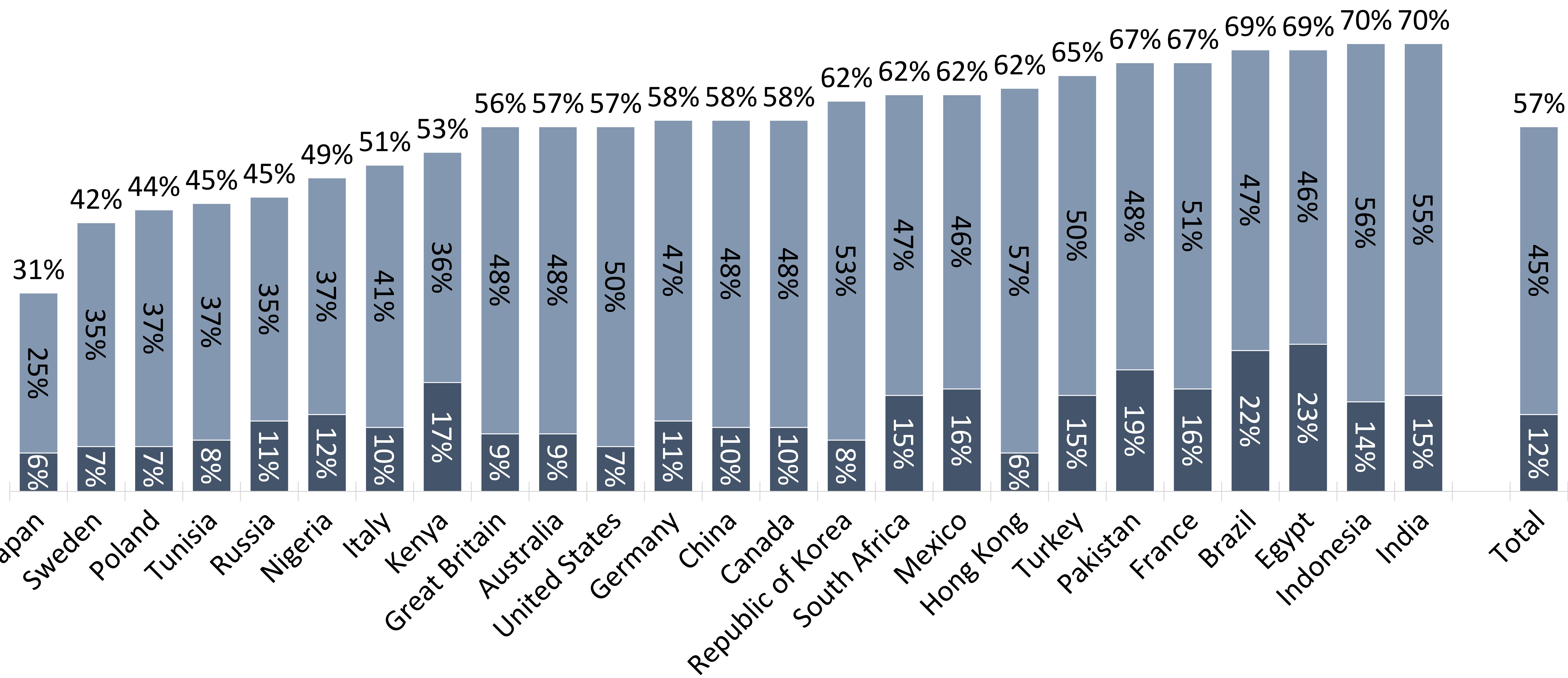
E-commerce platforms, tied for the least most common source of distrust with search engines, are a more common point of distrust in Latin America, the Middle East and Africa and the BRICS, suggesting potential barriers to adoption.



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Base: All Respondents who do not completely trust the internet (n=21,503)

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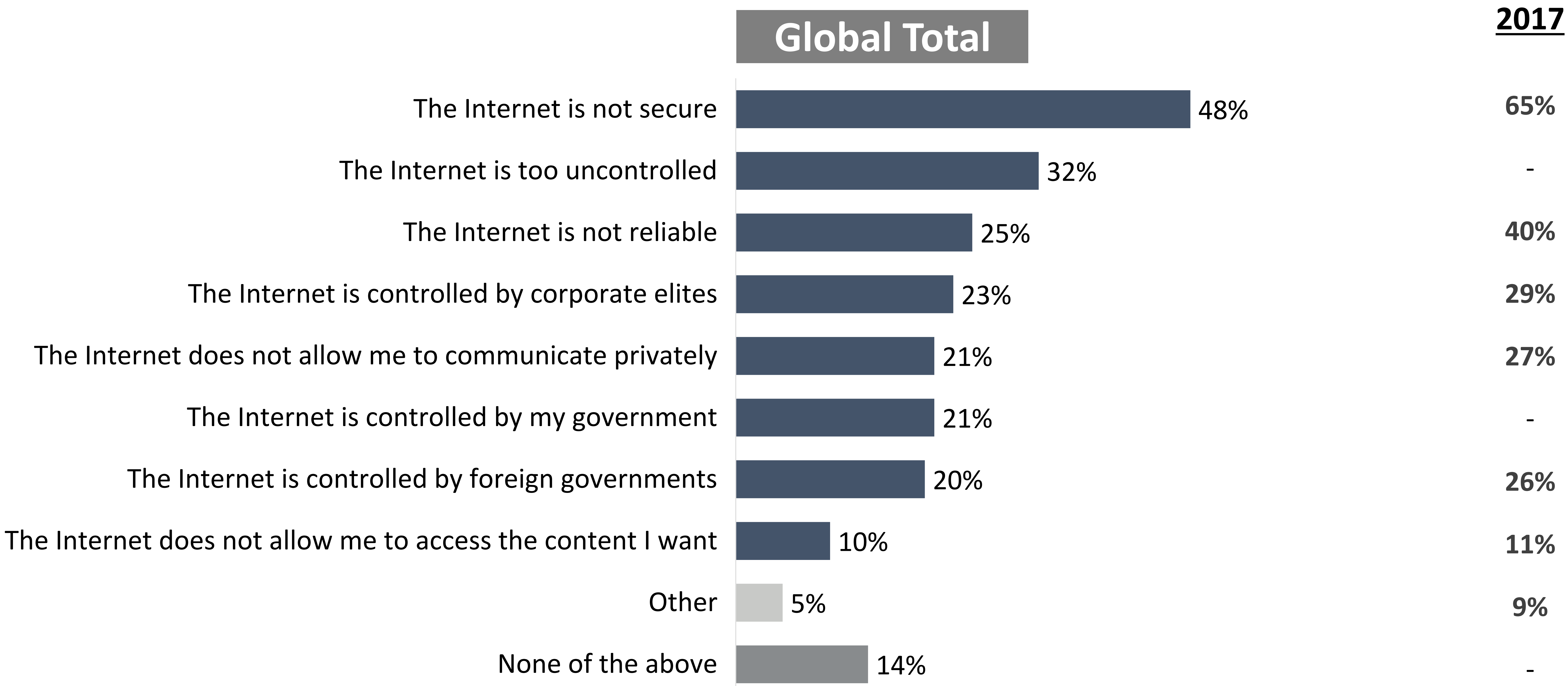
Among those who distrust the internet, the leading reason continues to be that they believe it is not secure, though less feel this way compared to last year (-17 points).



- Q7a. Why else do you distrust the Internet? Base: Those Who Distrust Internet 2018 (n=21,081); 2017 (n=10,168)

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BRICS and those in the Middle East/ Africa are generally more inclined to distrust the Internet for a variety of reasons.

	Total	North America	LATAM	Europe	APAC	G-8 Countries	BRICS	Middle East/Africa
Base: All Respondents	*n=21,081*	*n=1,810*	*n=1,591*	*n=5,512*	*n=7,095*	*n=7,412*	*n=4,143*	*n=4,117*
The Internet is not secure	48%	47%	44%	42%	48%	44%	50%	51%
The Internet is too uncontrolled	32%	24%	25%	31%	35%	31%	34%	32%
The Internet is not reliable	25%	16%	32%	22%	20%	19%	25%	35%
The Internet is controlled by corporate elites	23%	22%	23%	23%	17%	20%	21%	26%
The Internet does not allow me to communicate privately	21%	19%	24%	25%	16%	23%	25%	18%
The Internet is controlled by my government	21%	18%	17%	17%	18%	16%	18%	26%
The Internet is controlled by foreign governments	20%	12%	19%	17%	14%	15%	18%	27%
The Internet does not allow me to access the content I want	10%	5%	7%	6%	12%	6%	12%	12%
Other	5%	6%	8%	4%	4%	5%	5%	4%
None of the above	14%	21%	9%	18%	15%	20%	11%	10%

- Q7a. Why else do you distrust the Internet? Base: Those Who Distrust Internet 2018 (n=21,081)

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Trust and E-commerce

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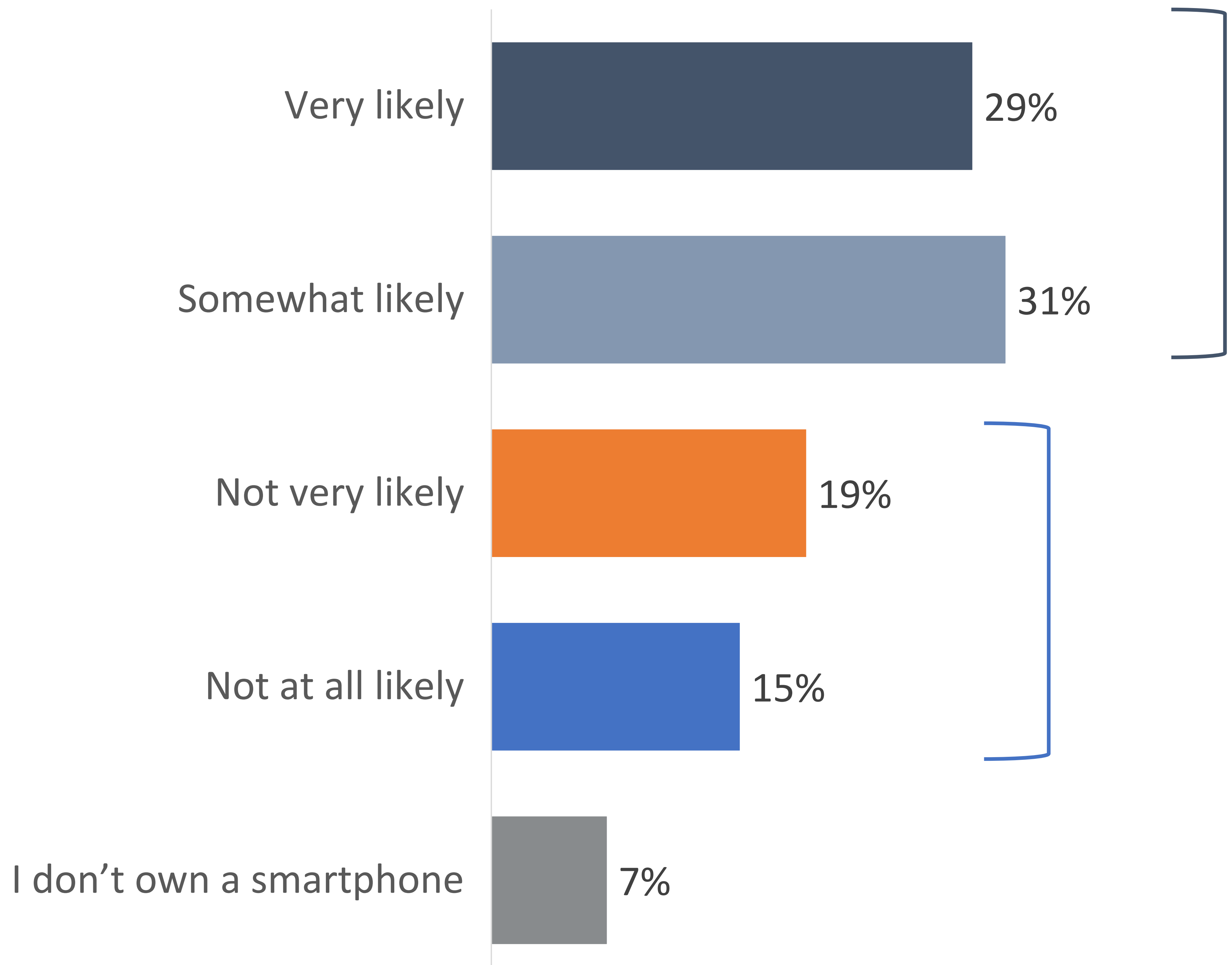
Six in ten (60%) global residents are likely to use mobile payment systems on their smartphone in the next year, up slightly since 2017 (57%). Just 7% of internet users globally do not own a smartphone.



Total Likely

2018	2017
60%	57%

Total Unlikely

2018	2017
34%	35%

- Q14. How likely are you to use mobile payment systems on your smartphone in the next year?
- Base: All Respondents Total 2018 (n=25,262); 2017 (n=24,225)

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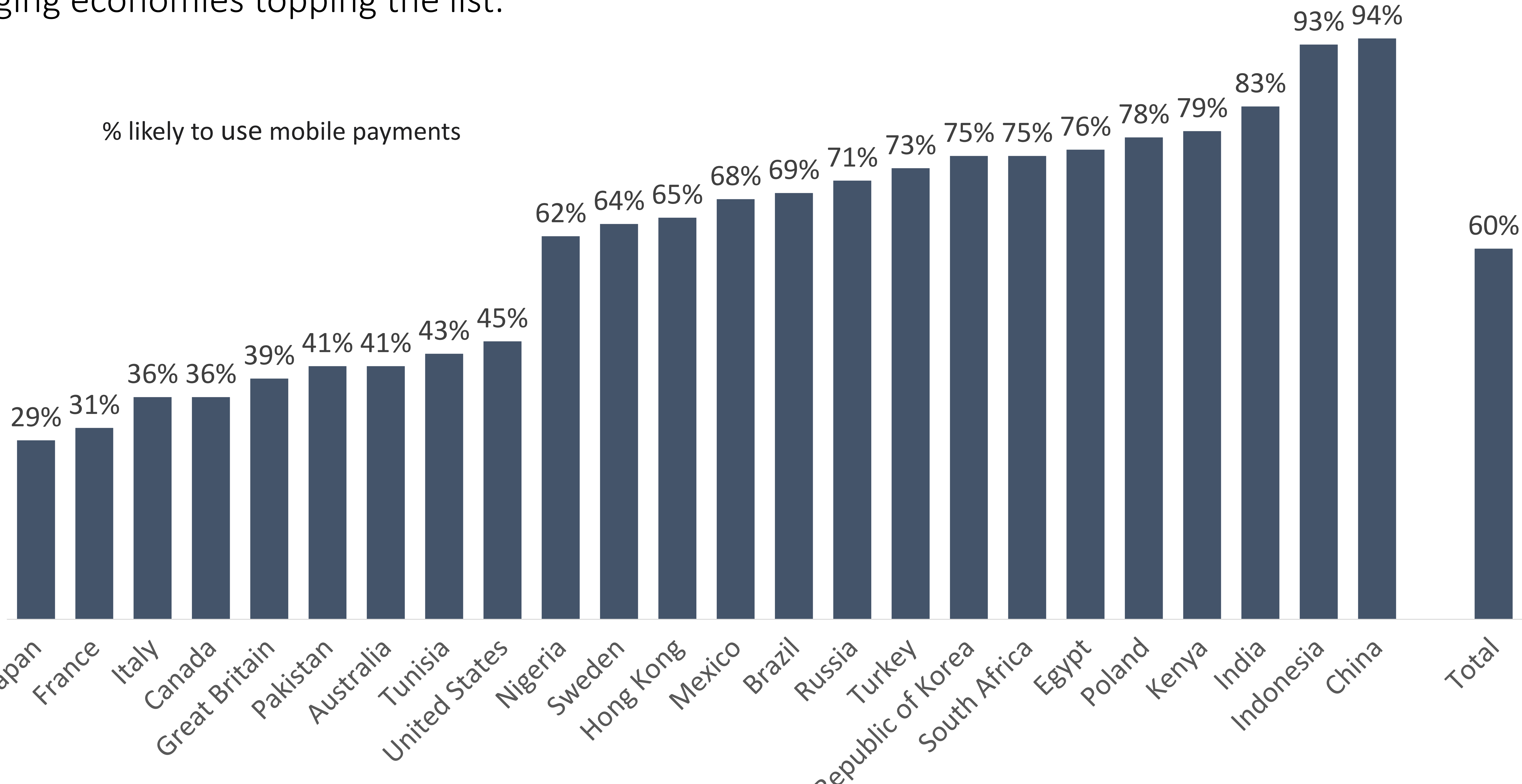
Propensity to use online payment systems on mobile phones varies greatly by economy, with mostly emerging economies topping the list.



- Q14. How likely are you to use mobile payment systems on your smartphone in the next year?
- Base: All Respondents Total 2018 (n=25,262)

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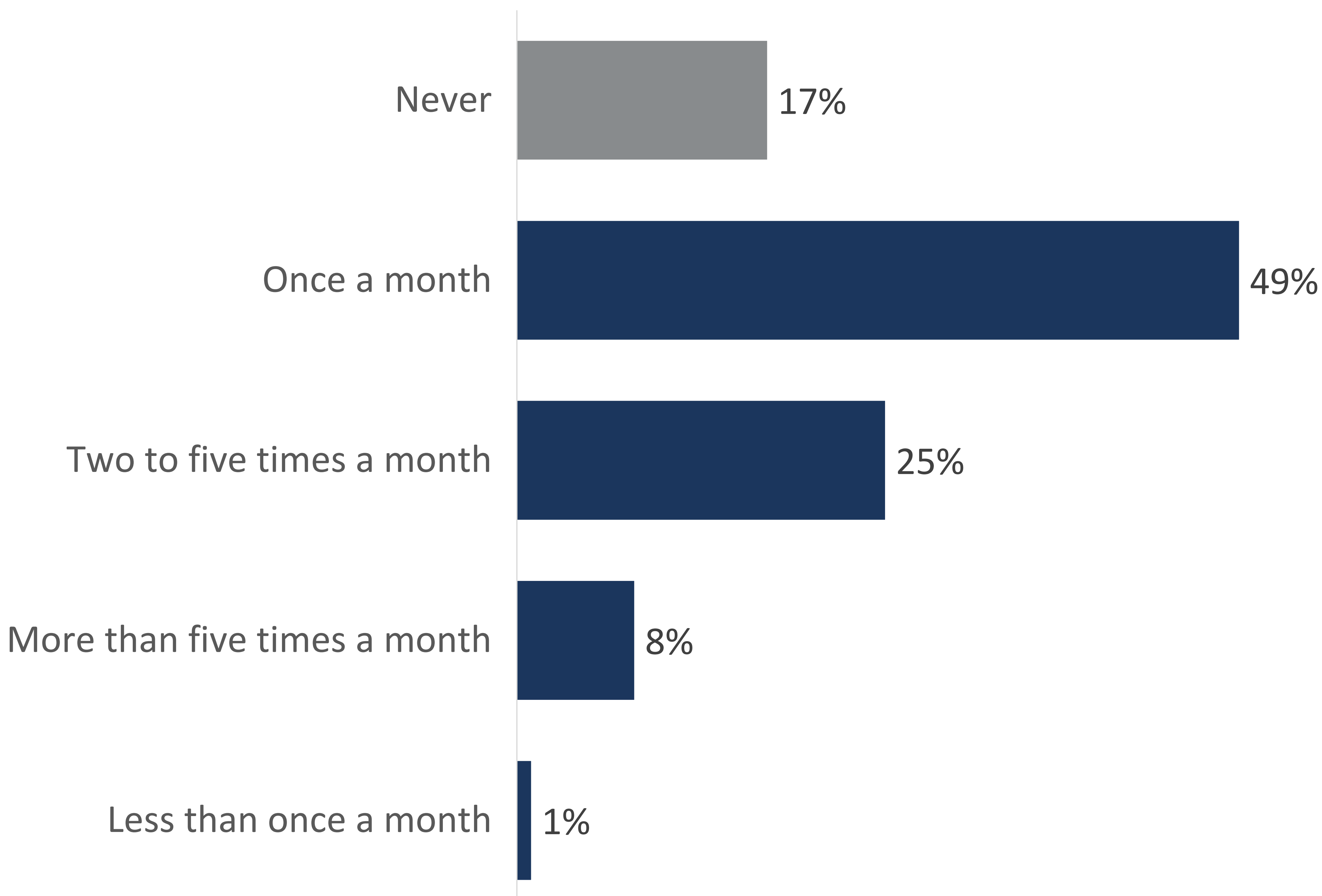
Two in ten (17%) say they never buy goods or services, down 5 points since last year. This means that a growing proportion (83%, up 5 points) make online purchases.



2017

22%

47%

23%

7%

0%

- Q15. How frequently do you buy goods or service online?
- Base: All Respondents 2018 (24,235)

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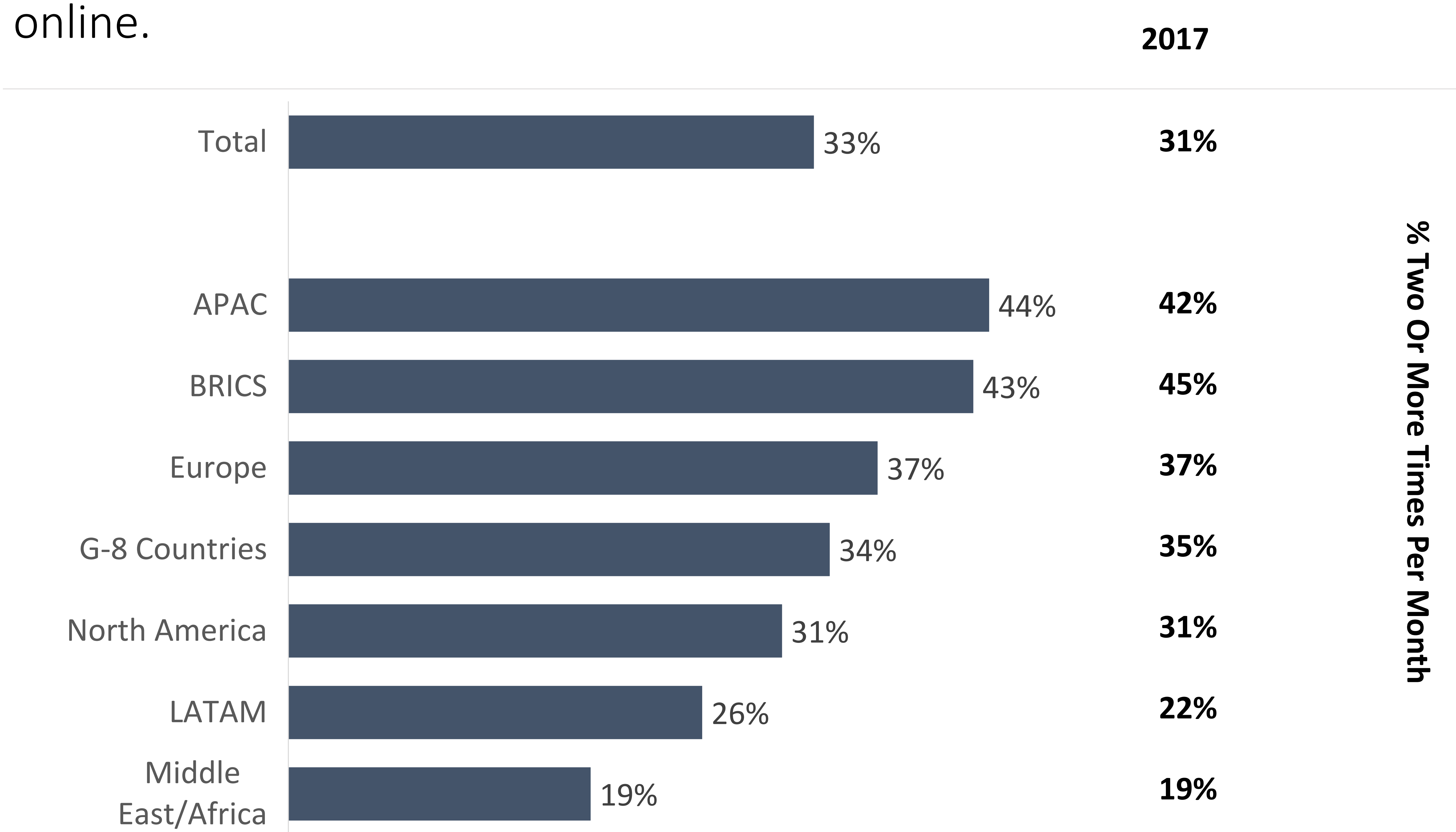
Close to half of those living in the BRICS and APAC regions frequently buy goods or services online.



- Q15. How frequently do you buy goods or service online?
- Base: All Respondents 2018 (24,235)

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Among those who never shop online, the key reason they do not is a lack of trust, stable from last year. Fewer say it's because it's too expensive to shop online, or that they're not able to make online payments.

- Q16. Why do you not purchase goods or service online?
- Base: Never Buy Goods or Services Online 2018 (n=3,942)

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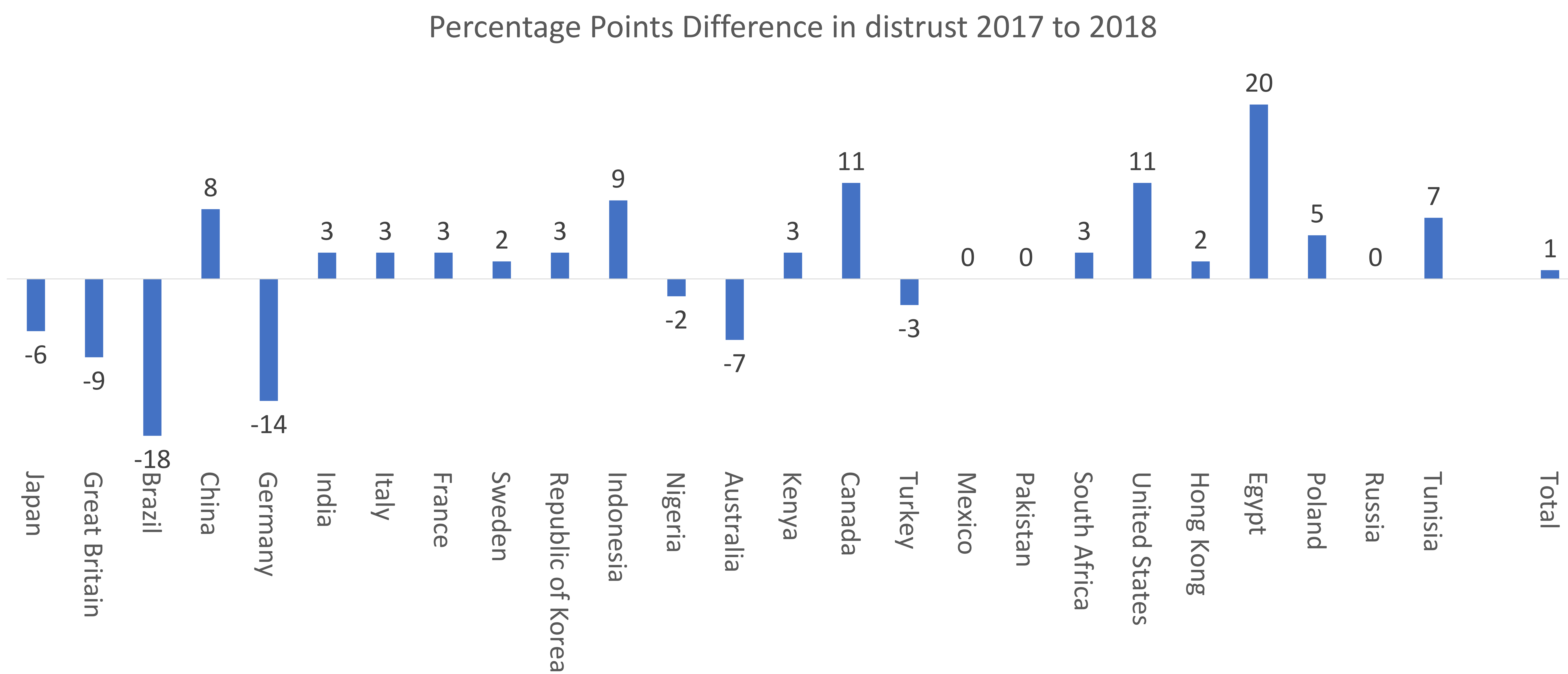
Significant reductions in distrust as an inhibitor of e-commerce occurred in Brazil, Germany, and Great Britain; however, these gains were largely offset by a significant increase in distrust in Egypt, the United States, Canada and Indonesia.



- Q16. Why do you not purchase goods or service online?
- Base: Never Buy Goods or Services Online 2018 (n=3,942)

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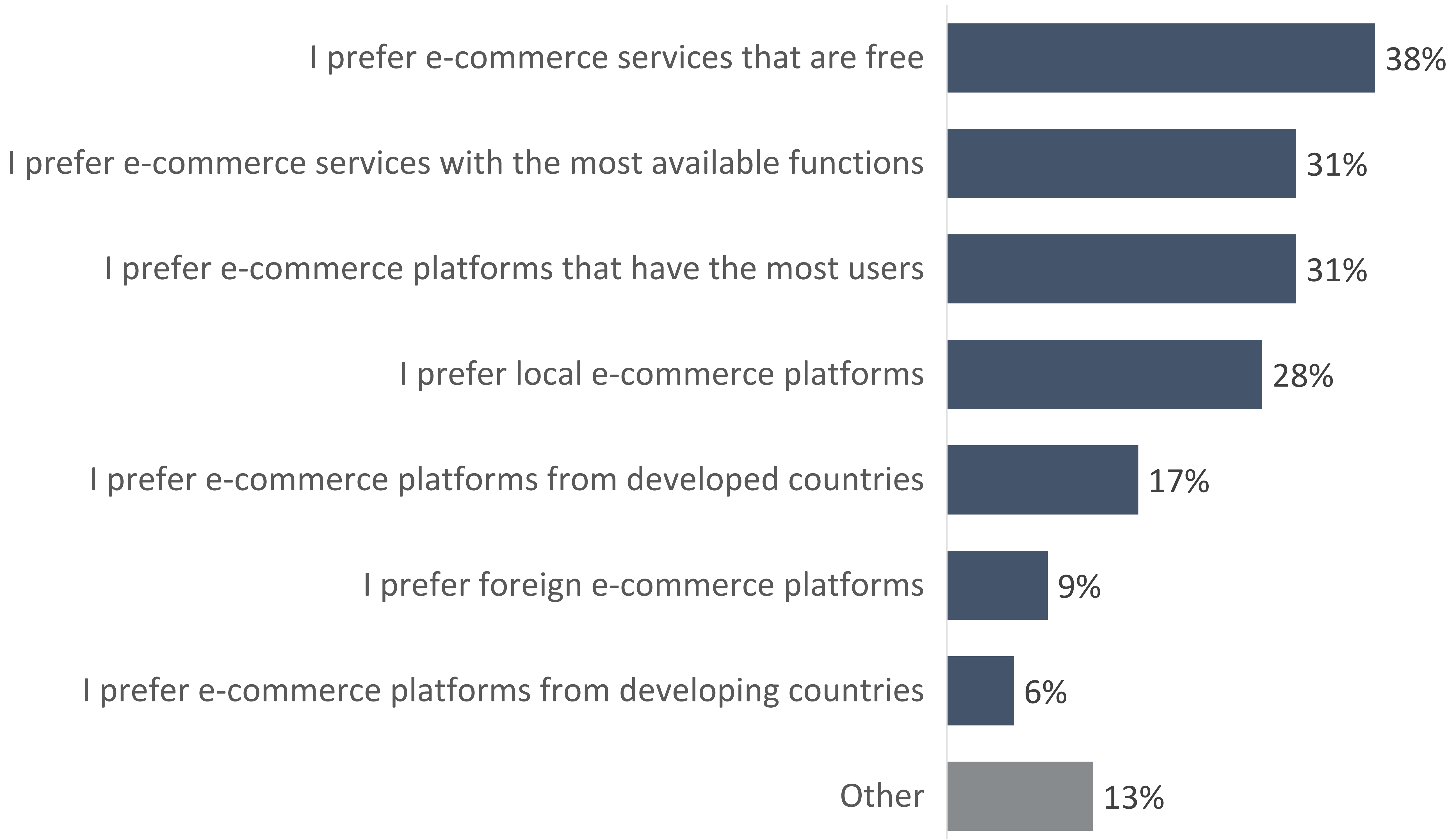
At four in ten (38%), free e-commerce services top the list as the most important factor in determining choice of an online e-commerce platform. Location of the platform is relatively less important to most people.



- Q18. Please select the most important factors in your choice of an online e-commerce platform:
- Base: (n=20,307)

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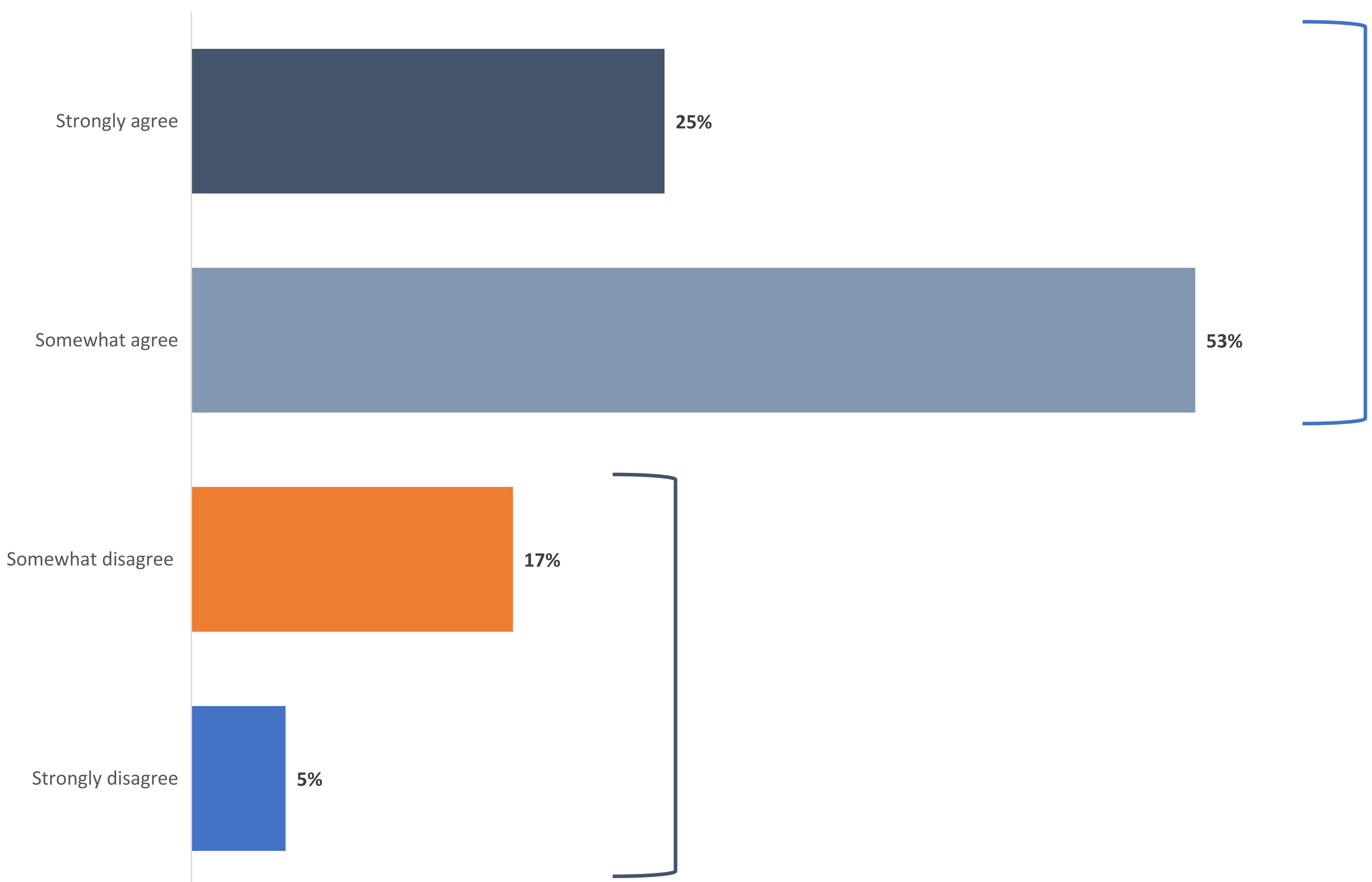
A strong majority (78%), though less than a year ago (-4 points), agree that the origin of the good or service effects what they buy – although most only somewhat agree that it's important. A growing proportion (22%, up 4 points) say it's not important.



Total Agree

2018	2017
78%	82%

Total Disagree

2018	2017
22%	18%

- Q20. Do you agree or disagree that when shopping online, where the good or service is made affects what you buy?
- Base: Buy Goods or Services Online at Least Once Month 2018 (n=20,307); 2017 (n=18,551)

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Technological Progress

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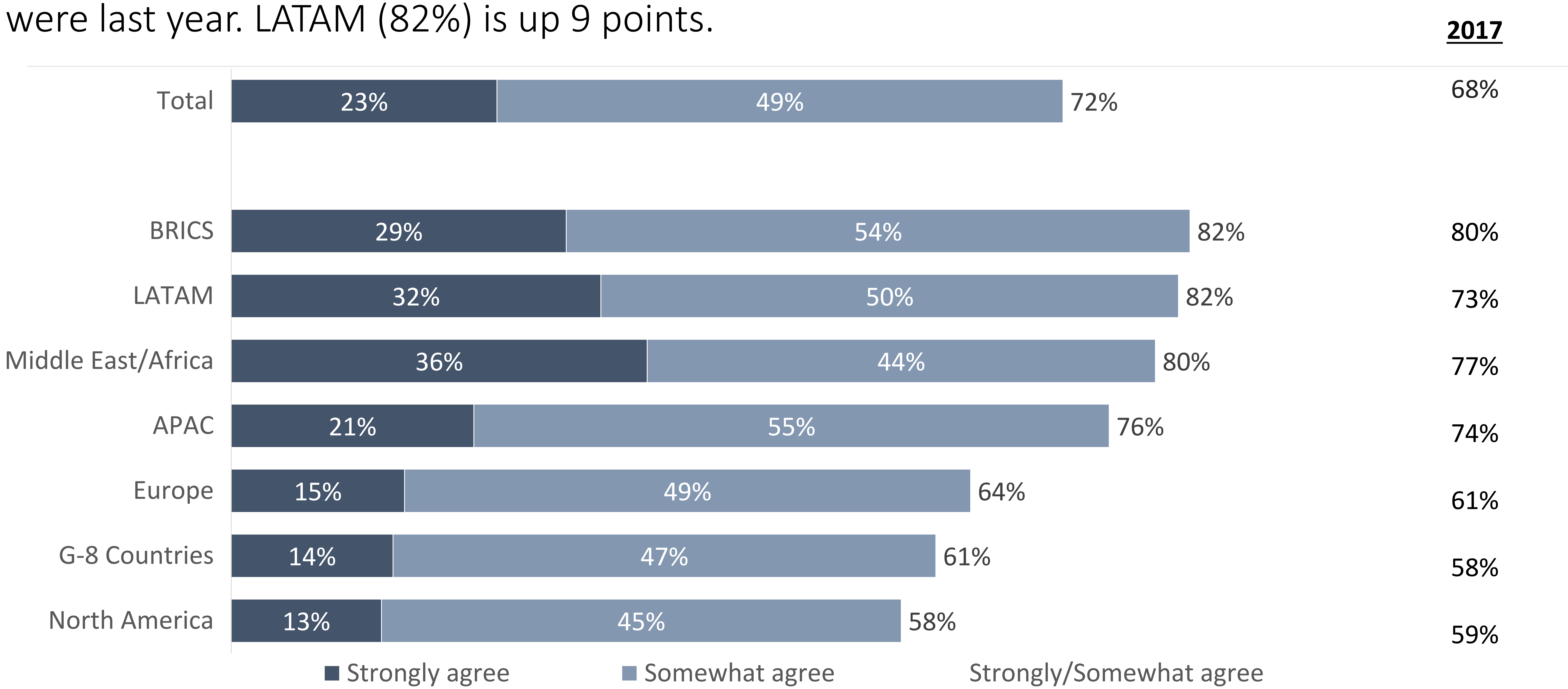
A majority of citizens in every Regional Economy agree that technological advancements outweigh the costs. Those in BRICS are most likely to agree, as they were last year. LATAM (82%) is up 9 points.



- Q34. A lot of new digital technologies, such as 3D printing and driverless cars, could lead to a drastically different economy. These technologies could make things cheaper for consumers, but they could also eliminate jobs across a variety of sectors, including manufacturing and transportation. Do you agree or disagree that the benefits of rapid technological advances such as 3D printing and driverless cars outweigh the costs? Base: All Respondents (n=25,262)

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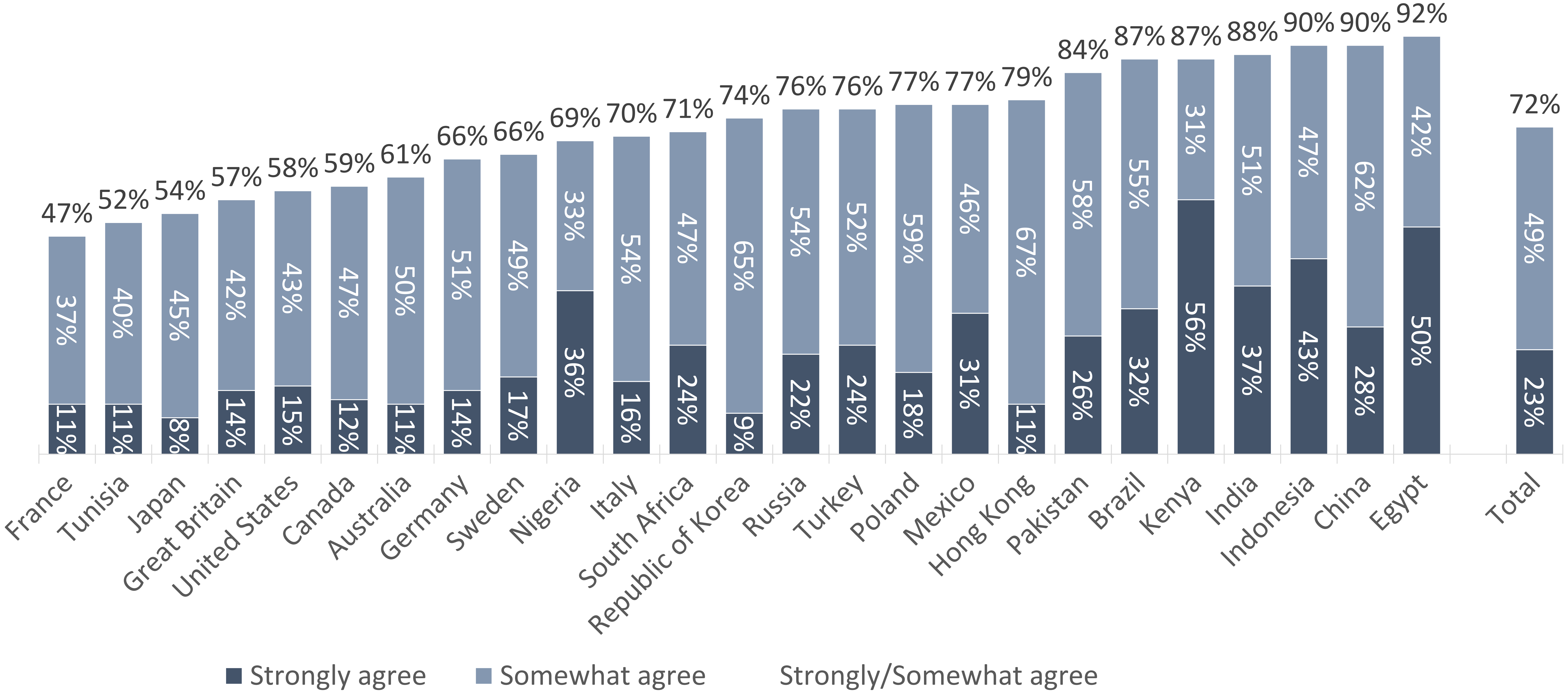
Agreement that new technology is worth the costs is the highest in emerging economies, such as Egypt (92%), China (90%), Indonesia (90%), India (88%), Kenya (87%) and Brazil (87%).



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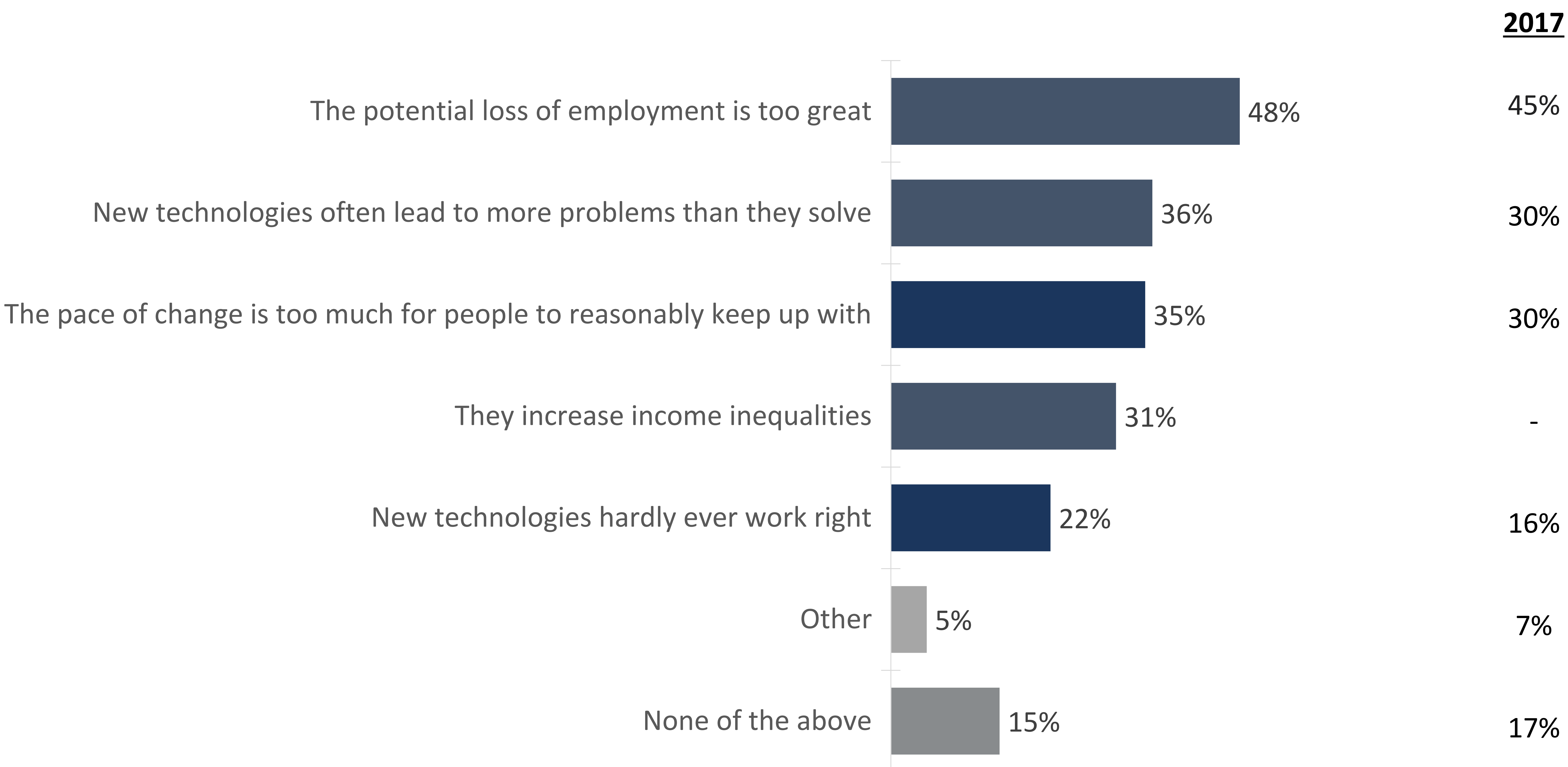
Among those who disagree that the benefits outweigh the costs, the main reason continues to be that the potential loss of employment is too great.



- Q35. Why do you disagree that the benefits of these new types of technological advances outweigh the costs?
- Base: Disagree Benefits Outweigh Costs (n=7,013)

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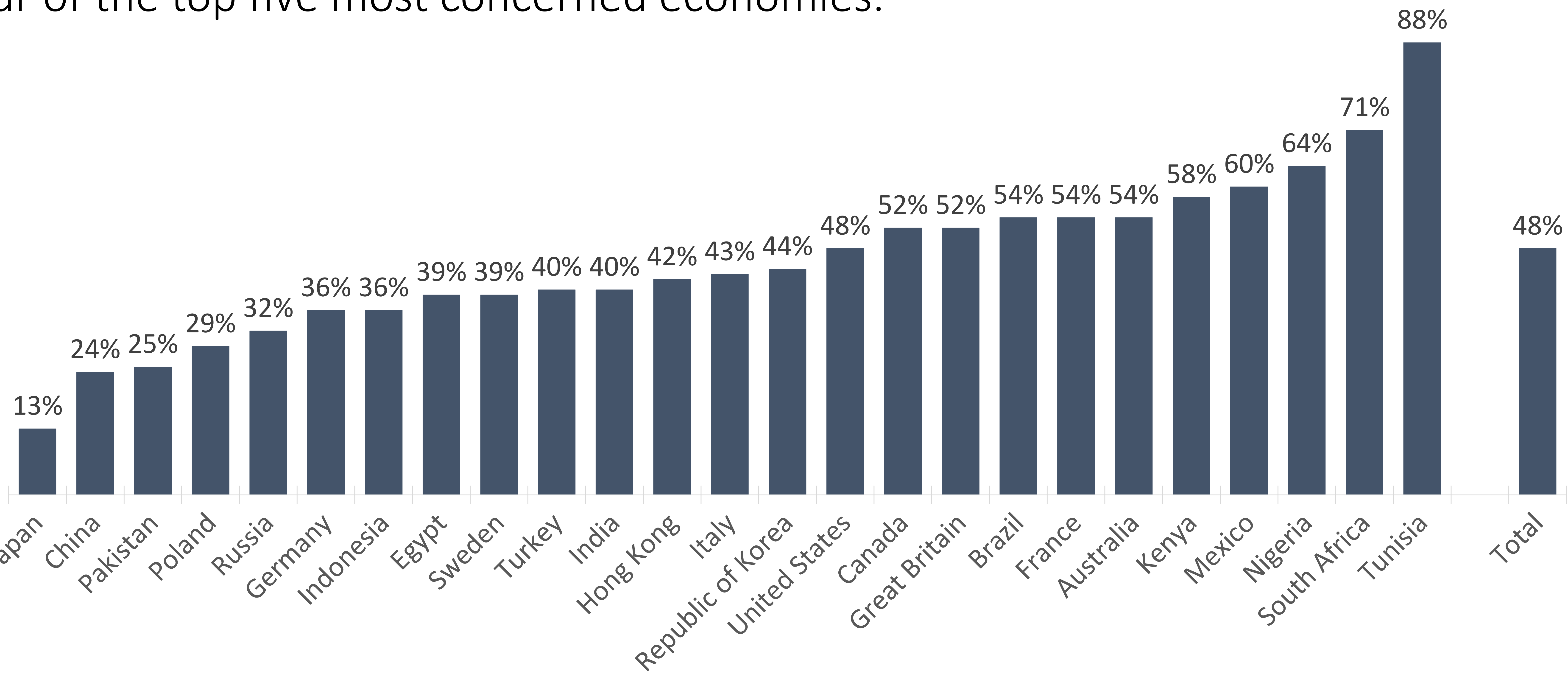
Concern over the loss of employment due to technological progress is particularly acute in African economies, with Tunisia, South Africa, Nigeria and Kenya making up four of the top five most concerned economies.



- Q35. Why do you disagree that the benefits of these new types of technological advances outweigh the costs?
- Base: Disagree Benefits Outweigh Costs (n=7,013)

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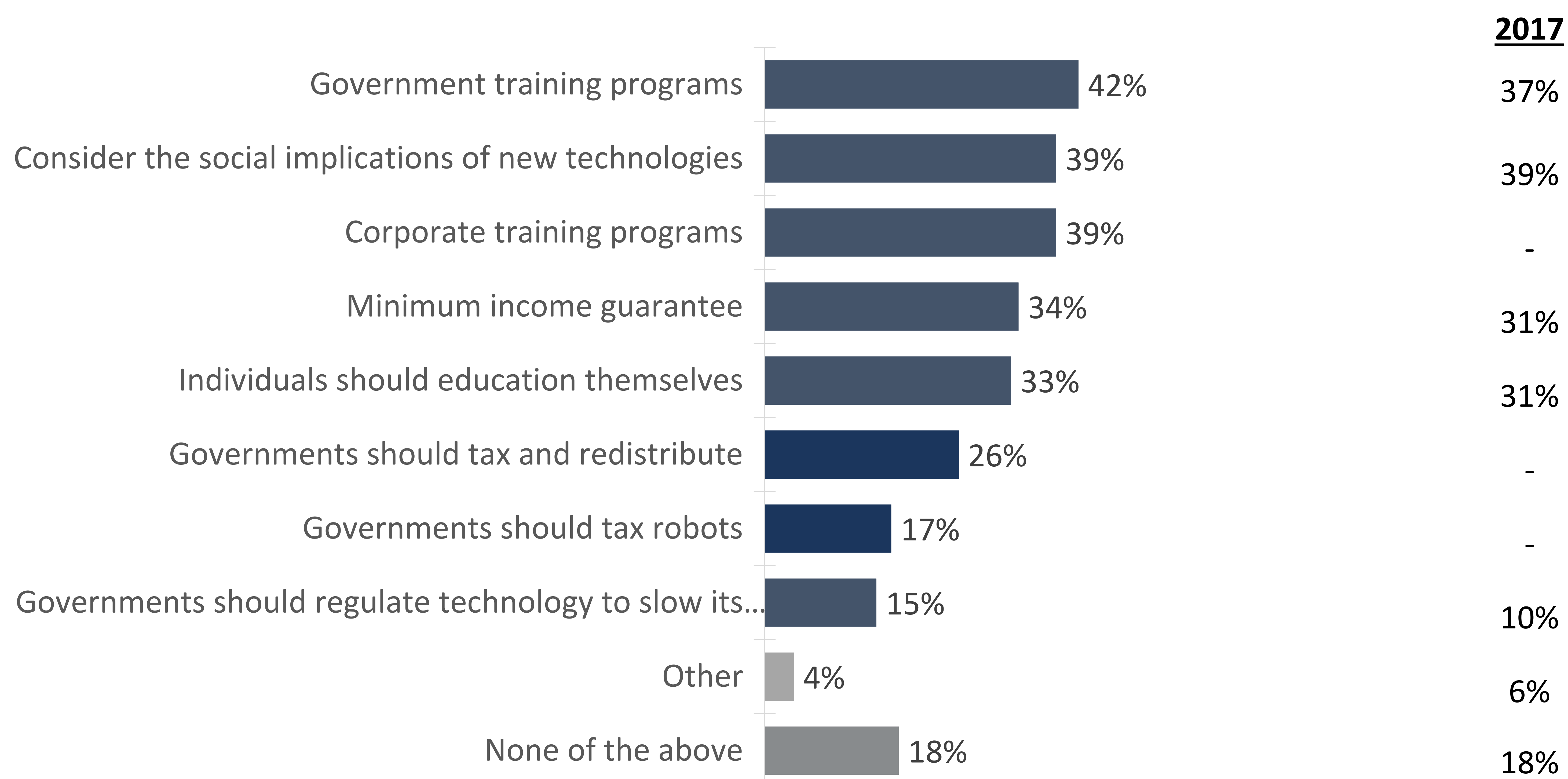
In terms of what can be done to manage disruptive transitions, government-provided training programs and skills development initiatives are cited as the most popular option (42% -- up from 37% in 2017).



- Q36. What steps should be taken to deal with the potentially negative effects of technological change? * not asked in China
- Base: Disagree Benefits Outweigh Costs (n=7,012)

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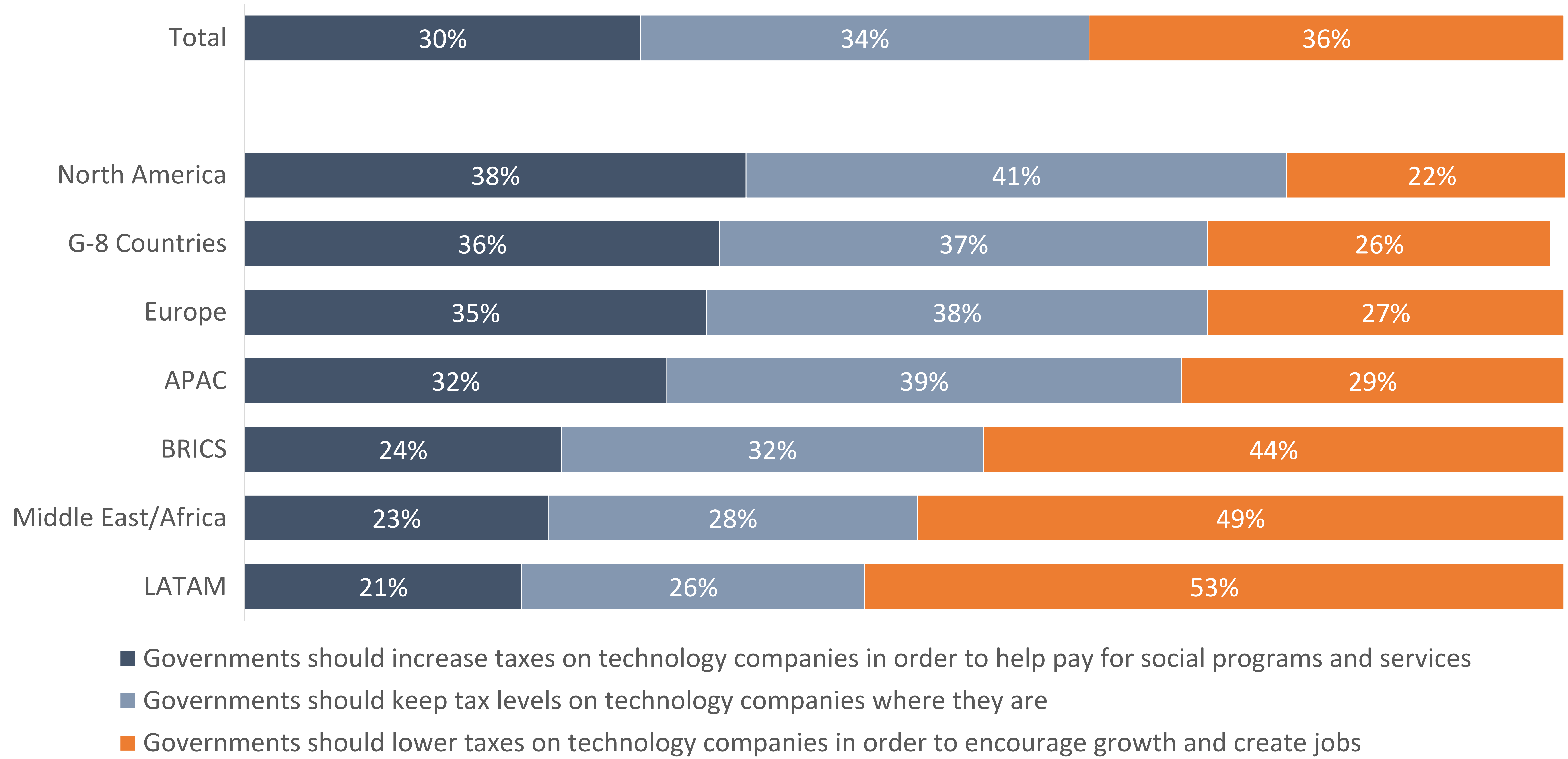
Developed Economies generally want to tax and spend, while emerging economies generally want to cut taxes to facilitate growth and create jobs



- Q42 Which of the following statements is closest to your point of view Base: All Respondents (n=25,259)

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Thank you.

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