Internet Security Priorities

Prepared for:

Computer & Communications Industry Association

Tech Advocacy Since 1972

Presented by:
Benenson Strategy Group and American Viewpoint
December 20, 2013

Methodology

❖ **The Benenson Strategy Group and American Viewpoint conducted 1,000 telephone interviews from November 12-18, 2013.**

❖ **Interviews were conducted with registered voters nationwide who use the Internet.**

   ➢ **Voters were defined as those who voted in the 2012 presidential election or registered to vote after November 2012.**

❖ **The margin of error for the entire data set is ±3.02% at the 95% confidence level. It is higher among subgroups.**

Contact Information

❖ For questions about the data contained in this presentation, please contact:

   ➢ Danny Franklin, Benenson Strategy Group: dfranklin@bsgco.com; 212-702-8777

   ➢ David Kanevsky, American Viewpoint: david@amview.com; 703-684-3325

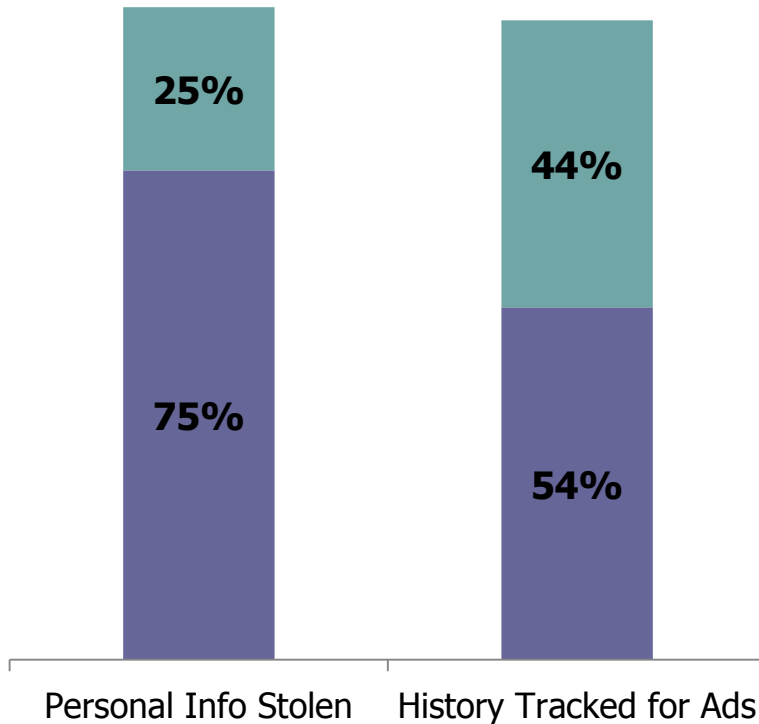# Voters Are Much More Worried about Hacking than Tracking

Voters Deeply Worried about Security of Their Info; Stopping Tracking for Ads Is Not a Priority

Voters 20x more likely to say top concern is ID theft than to say targeted ads
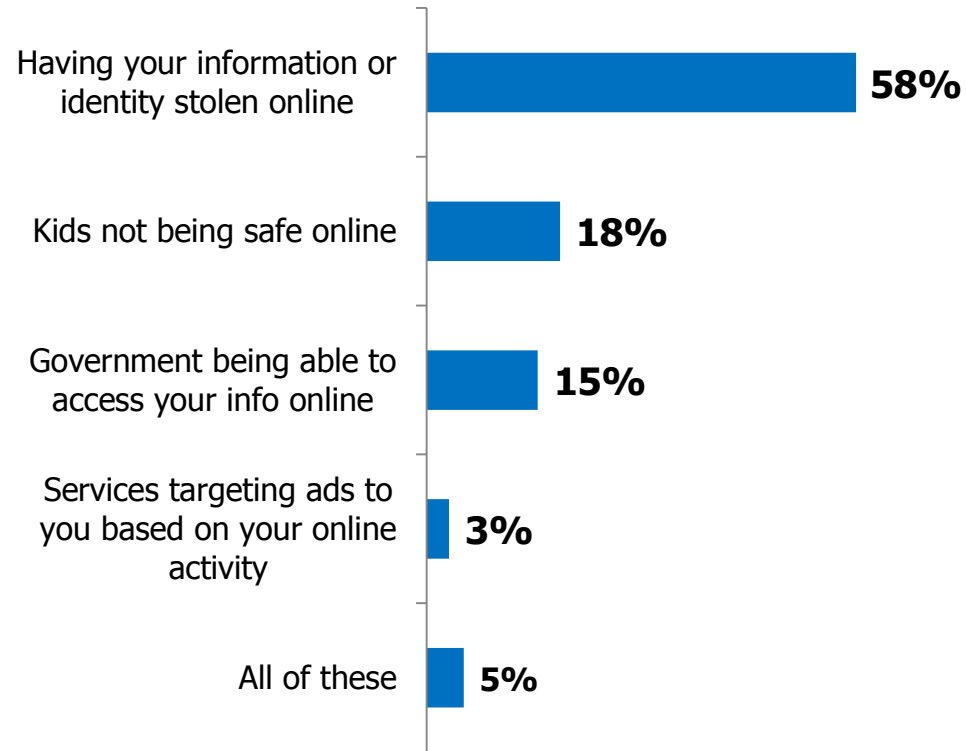
Key Attitudes on Privacy and Security

Worry about Privacy and Security

- Not Worried
- Worried

	Personal Info Stolen	History Tracked for Ads
Not Worried	25%	44%
Worried	75%	54%

Top Concern about Online Privacy and Security
(Forced Choice)

Having your information or identity stolen online	58%
Kids not being safe online	18%
Government being able to access your info online	15%
Services targeting ads to you based on your online activity	3%
All of these	5%

Overall, Voters Are 5x More Concerned with Hacking over Tracking

Priorities: Worries about Security and Privacy
Which generally worries you more?

The information I share online will be <u>hacked to cause harm or steal from me</u>

Companies will use the information I share online to <u>target advertising to me</u>

	All Voters (100%)	Worried about Hacking (75%)	Worried about Tracking (54%)
Hacked	80%	84%	79%
Target advertising	16%	14%	18%
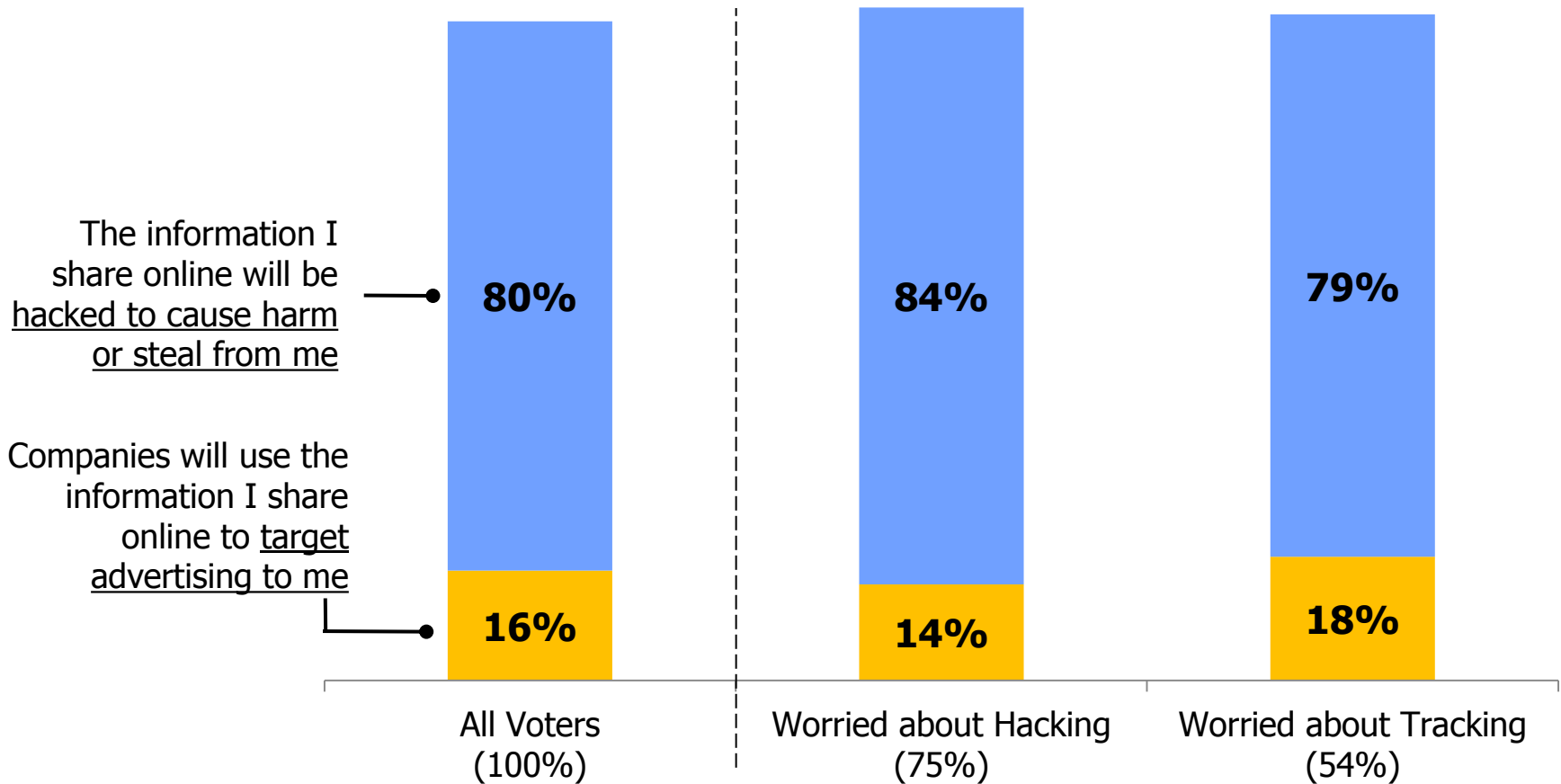
Protecting Security Is Far More Important to Voters than Protecting Browsing History
Even voters concerned about Internet tracking clearly prioritize security

Priorities: Protecting Online Security and Privacy
Which is more important to you?

Protecting your <u>personal information</u>, such as your Social Security number or financial records, from <u>online hackers</u>

	All Voters (100%)	Worried about Hacking (75%)	Worried about Tracking (54%)
Personal information from hackers	87%	88%	84%

Protecting information about your <u>online behavior</u>, such as your online searches and browsing history or emails, from Internet companies who <u>target ads</u> based on that activity — 6%

No difference/Don't know/Refused — 7%

Category	All Voters	Worried about Hacking	Worried about Tracking
Online behavior / target ads	6%	6%	8%
No difference/Don't know/Refused	7%	6%	8%

All Voters (100%) **Worried about Hacking (75%)** **Worried about Tracking (54%)**

Which is more important to you...?

Voters Want a Free Internet Paid For by Ads rather than a Fee-Based Internet with No Ads

Even voters who would pay to have no ads say security is more important

When it comes to online services like email or social networks, which would you prefer?

61%

33%

A **free service** that is **supported by ads** that are targeted to you based on your online activity

A service that you **pay a fee to use** that **doesn't have ads** that are targeted to you based on your online activity

This is the most popular position across demographic groups, with young people and heavy Internet users even more likely to agree:
- ✓ **18-34 yrs: 69% free service**
- ✓ **Use Internet more than once/day: 65% free service**

Even those who would pay to have no ads are more much more concerned about security:
- ✓ **86%** say it's more important to protect their personal info from hackers vs. **8%** who say it's more important to protect browsing info from companies

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When it comes to online services like email or social networks, which would you prefer?
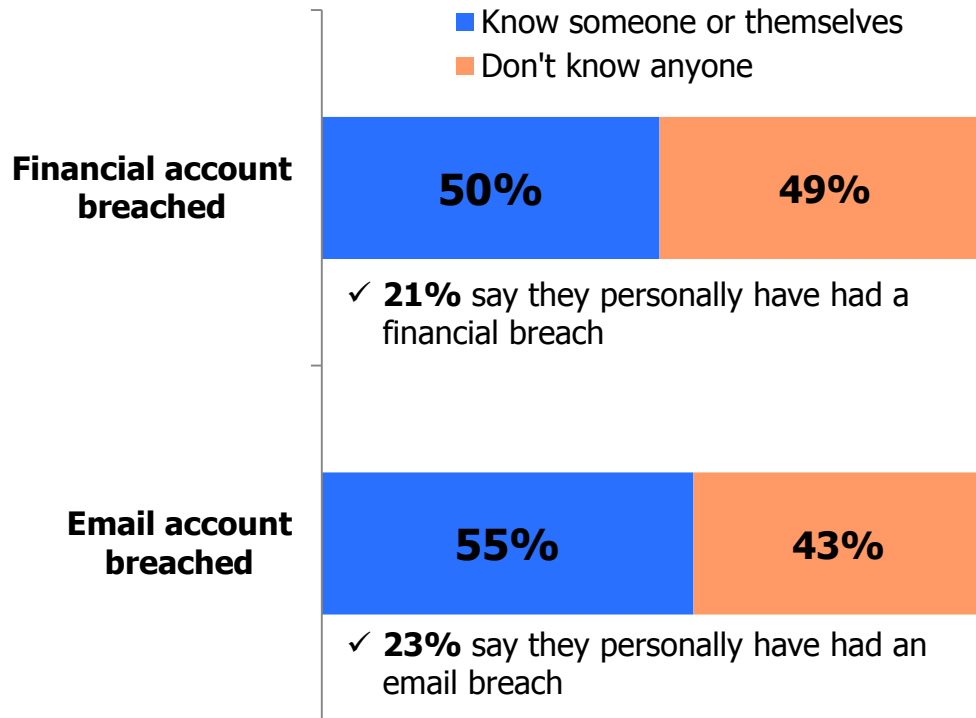
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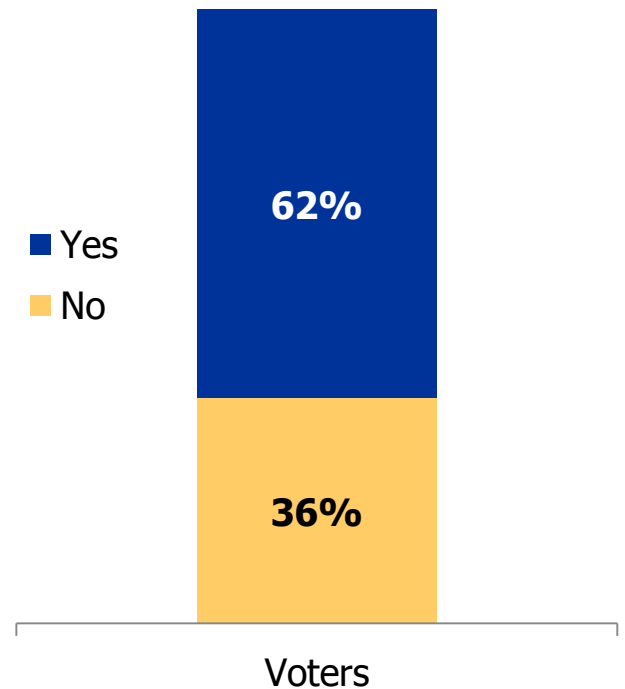# Voters Feel Vulnerable to Hacking and Want the Government To Act

Security Is a Priority Due to Acute Awareness of Risk: Most Are or Know a Victim of Online Breach

Experience with Online Security Breaches

Have you or anyone you know had your online accounts breached?

- ■ Know someone or themselves
- ■ Don't know anyone

Financial account breached
- 50%
- 49%

✓ **21%** say they personally have had a financial breach

Email account breached
- 55%
- 43%

✓ **23%** say they personally have had an email breach

Received a suspicious email you suspected came from a breached account:

- ■ Yes
- ■ No

- 62%
- 36%

Voters

Consequently, There Is Strong and Decisive Desire for Gov't Action on Identity Theft

Want gov't to go after criminal hackers not the companies that were hacked

Role for Government In Protecting Security

Which of the following comes closer to your view?

74% The federal gov't needs to **do more** to prevent and act against identity theft

56% strongly believe this

19% The federal gov't has **done enough** to prevent and act against identity theft

7% Don't know

What should be the more important priority for government regulators?
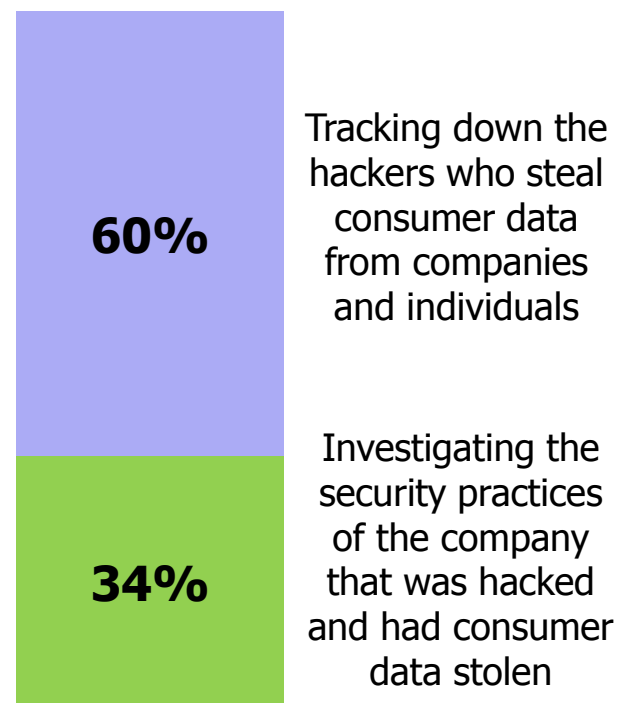
60% Tracking down the hackers who steal consumer data from companies and individuals

34% Investigating the security practices of the company that was hacked and had consumer data stolen

Which of the following comes closer to your view? And would you say you feel strongly about that or not too strongly about that?
When a company is the target of an online security breach, what should be the more important priority for government regulators?
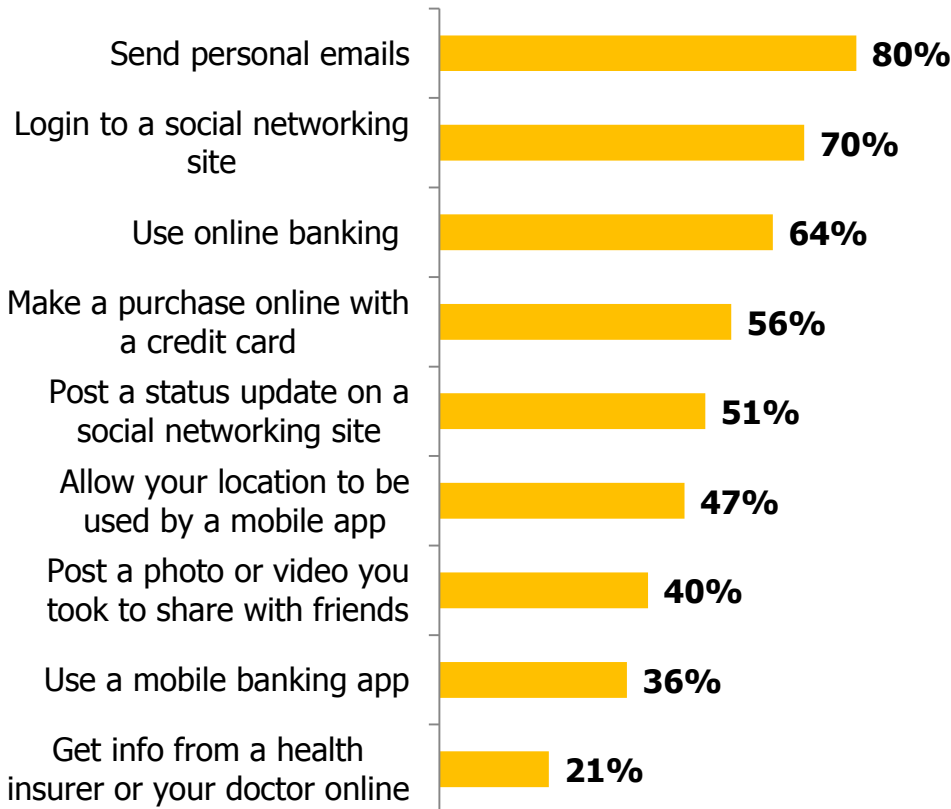
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Voters Choose To Share Info; Know How and Act To Protect Privacy

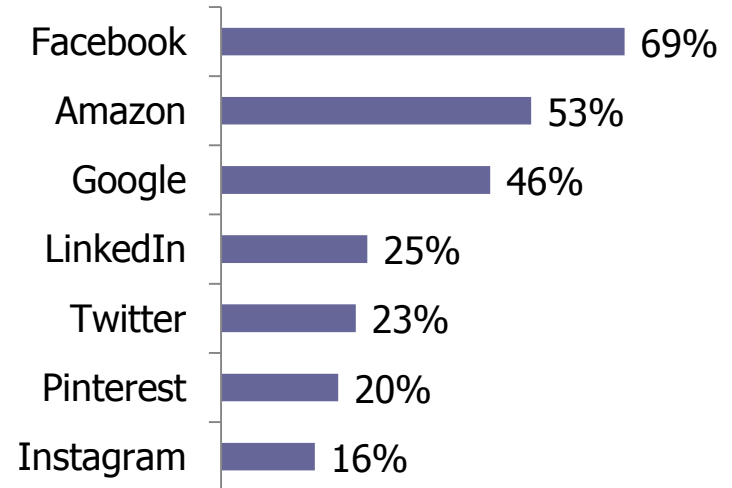# Voters Share Information Online through a Variety of Channels

Voters: Online Behaviors

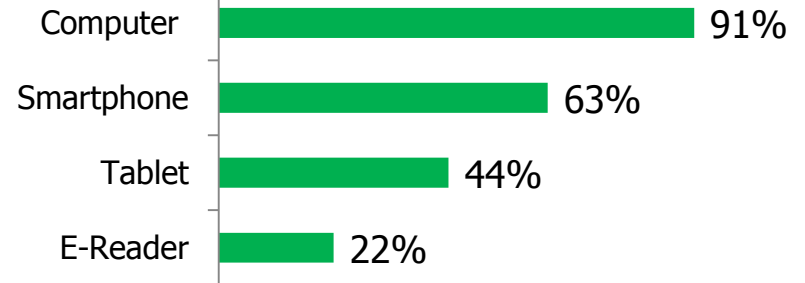### Online Behaviors: % Do Each Monthly or More

Behavior	%
Send personal emails	80%
Login to a social networking site	70%
Use online banking	64%
Make a purchase online with a credit card	56%
Post a status update on a social networking site	51%
Allow your location to be used by a mobile app	47%
Post a photo or video you took to share with friends	40%
Use a mobile banking app	36%
Get info from a health insurer or your doctor online	21%

Showing activities 20% or more do monthly

Voters Have Accounts on:

Platform	%
Facebook	69%
Amazon	53%
Google	46%
LinkedIn	25%
Twitter	23%
Pinterest	20%
Instagram	16%

And Access Them through:

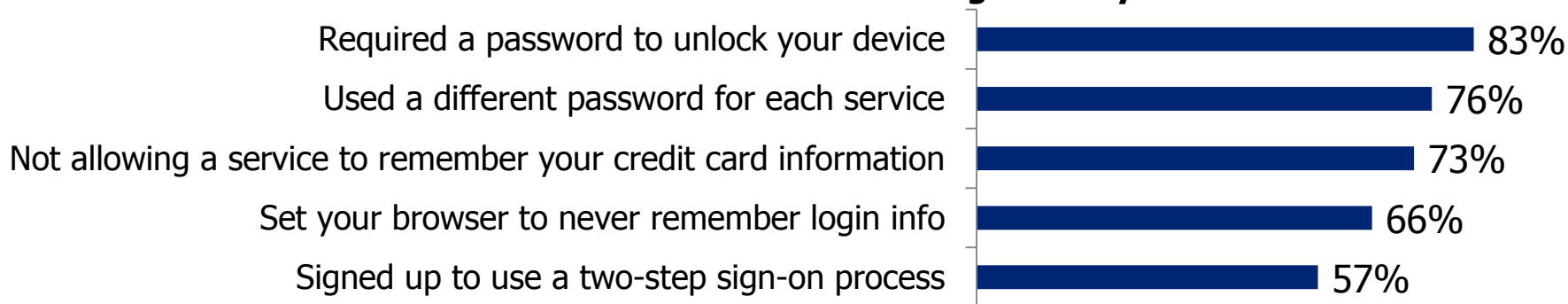| Device	%
Computer	91%
Smartphone	63%
Tablet	44%
E-Reader	22%

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How often do you do this?
Do you have an account on any of the following?
Do you regularly use any of the following devices?

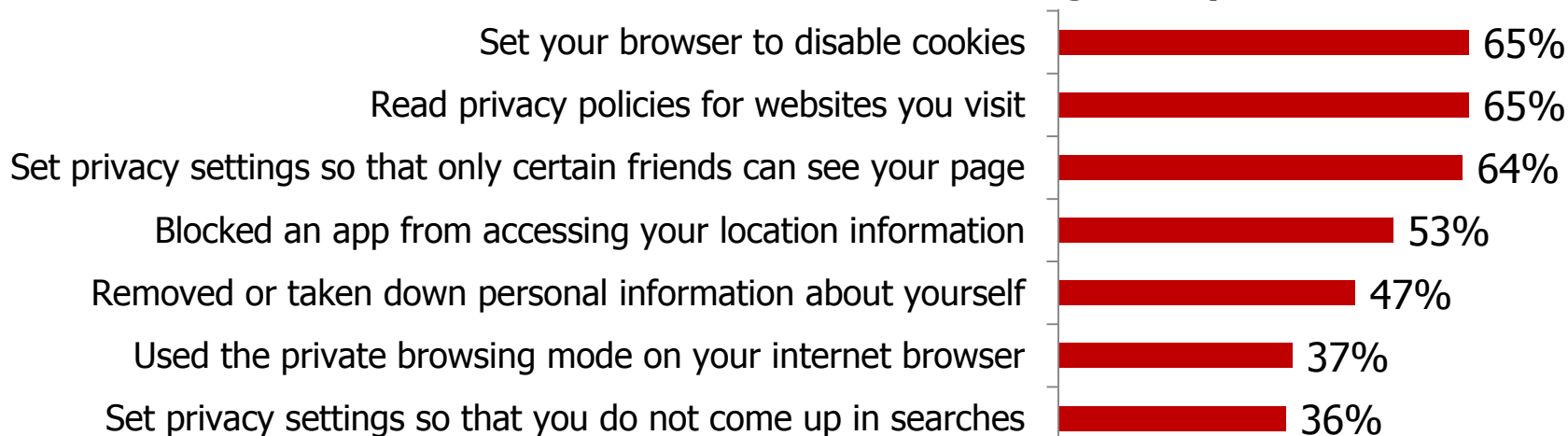# Voters Are Taking Concrete Steps To Protect Themselves, Especially on Security

Steps Taken To Protect Online Security & Privacy
% have taken this step

Protecting Security

Step	%
Required a password to unlock your device	83%
Used a different password for each service	76%
Not allowing a service to remember your credit card information	73%
Set your browser to never remember login info	66%
Signed up to use a two-step sign-on process	57%

Protecting Privacy

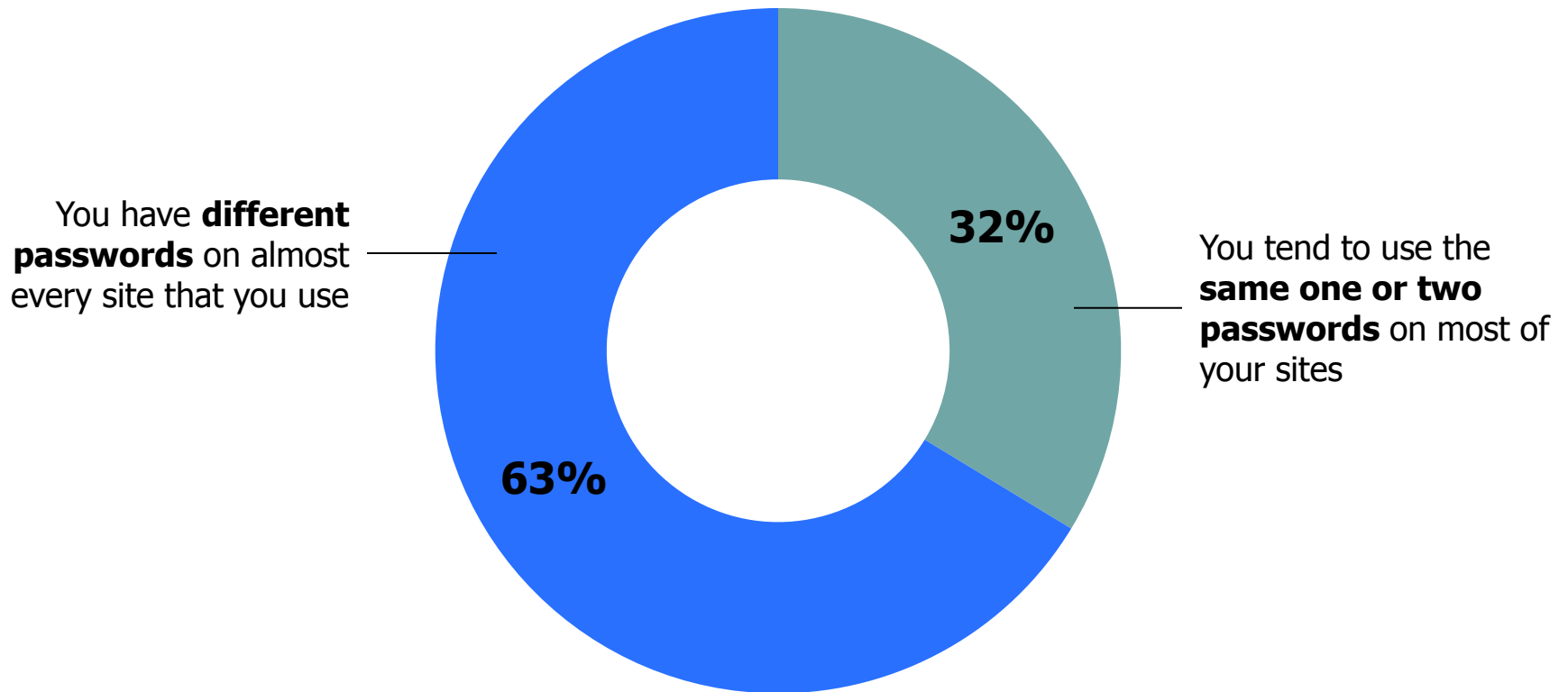| Step	%
Set your browser to disable cookies	65%
Read privacy policies for websites you visit	65%
Set privacy settings so that only certain friends can see your page	64%
Blocked an app from accessing your location information	53%
Removed or taken down personal information about yourself	47%
Used the private browsing mode on your internet browser	37%
Set privacy settings so that you do not come up in searches	36%

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Have you ever taken this step or have you never done this?

Most Report Being Cautious with Passwords, but Secure Password Habits Not Universal
1 in 3 voters who use same password across Internet at high risk for theft

Password Behaviors

Which of the Following Best Describes You?

You have **different passwords** on almost every site that you use

32%

You tend to use the **same one or two passwords** on most of your sites

63%

Now think about the passwords that you have on your various online accounts. Which of the following statements would you say best describes you?

Voters Knowledgeable about Steps To Protect Their Privacy and Take Action To Do So
Those who adjusted settings concerned about security of personal info

Have you ever adjusted the privacy settings on a social networking or online account?

Yes - 68%	No - 31%

Main reason why you changed your privacy settings *(Open-End)*

Protecting security of my information (NET)	**47%**
Trying to protect my personal information	41%
My account has been hacked in the past	7%
Keeping individuals out of my private life (NET)	**32%**
Didn't want strangers seeing this info/Don't want to be harassed or stalked	16%
Wanted to limit who had access/ Didn't want people I know to see it	16%
Thought was right thing to do/someone recommended it	**7%**
Don't want a lot of ads	**2%**

78%
Actively chose not to change their settings
(24% of all voters)

vs.

22%
who said: I don't know how
(7% of all voters)

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Thinking about social networking and other online accounts that you have, have you ever adjusted the privacy settings on your accounts?
What is the main reason why you changed privacy settings on your accounts?
What is the reason why you have not changed privacy settings on your accounts?

BENENSON STRATEGY GROUP

AMERICAN VIEWPOINT ®

TO:	CCIA
FROM:	Danny Franklin and David Kanevsky
RE:	Internet Security Poll – Executive Summary
DATE:	December 20, 2013

Methodology:

This research was conducted by Benenson Strategy Group and American Viewpoint. The interviews took place from November 12-18, 2013 and included 1,000 interviews with registered voters nationwide who use the Internet. All interviews were conducted over the telephone and included cell phone interviews. The margin of error for the entire data set is ±3.02% at the 95% confidence level.
Contact information: Danny Franklin, Benenson Strategy Group: dfranklin@bsgco.com; 212-702-8777
David Kanevsky, American Viewpoint: david@amview.com; 703-684-3325

Voters are significantly more worried about hacking than tracking by companies

➢ On average, voters are 5 times more worried about hacking than tracking.
   ✓ 80% say they are more worried the information they share will be hacked to cause harm or steal from them while just 16% are more worried that companies will use the information they share online to target advertising to them.

➢ Overall, 75% are worried about their personal information being stolen by hackers and 54% are worried about their browsing history being tracked for targeted advertising, but when voters are forced to choose which one is more important to them, even those worried about tracking (the 54%) are *more* worried about hacking.
   ✓ Indeed, voters' focus is almost unanimously directed on the need to protect their personal information.

Which is more important to you?

	Among Total (100%)	Among those worried about online tracking (54%)
Protecting your personal information, such as your Social Security number or financial records, from online hackers	87%	84%
Protecting information about your online behavior, such as your online searches and browsing history or emails, from Internet companies who target ads based on that activity	6%	8%
No difference/ Don't know	7%	8%

Voters strongly believe the federal government should go after hackers and thieves

➢ Voters recognize they are vulnerable to security breaches online.
- ✓ 55% say they or someone they know had their email account breached.
- ✓ 62% report receiving a suspicious email from someone likely due to that person's email being hacked.
- ✓ 50% say they or someone they know had their financial accounts breached online.

➢ This acute awareness of threats to the security of their information has resulted in strong sentiment for the government to take action to protect online security.
- ✓ 74% say the federal government needs to do more to prevent and act against identity theft, including a 56% majority of voters who say they feel strongly about this.
- ✓ Additionally, voters would rather regulators go after hackers who steal consumer data (60%) over investigating the security practices of the company that was hacked (34%).

Voters choose to share information online and take steps to protect themselves

➢ By choice, most voters actively share information online through a wide range of channels.

Top Online Activities, Done Monthly or More

	Among Total
Send personal emails	80%
Login to a social networking site	70%
Use online banking	64%
Make a purchase online with a credit card	56%
Post a status update on a social networking site	51%
Allow your location to be used by a mobile app	47%
Post a photo or video you took to share with friends	40%

➢ And because they know the risks to their privacy, voters are active in taking steps to protect themselves:
- ✓ 73% have chosen to not allow a service to remember their credit card information
- ✓ 65% have chosen to set their browser to disable cookies
- ✓ 53% have chosen to block an app from accessing their location information

➢ Overall, most voters have adjusted their privacy settings (68%) and those who haven't are doing it out of choice, not because they don't know how.
- ✓ Only 7% of voters overall say they haven't adjusted their privacy settings because they do not know how to do so.
- ✓ Among the 68% of voters who have adjusted the privacy settings for their online accounts just 2% say they did so because they don't want to see ads (most cite protecting their security or keeping information private from individuals as the reason).

➢ Ultimately, voters are looking for an Internet that is both free and secure to use.
- ✓ Twice as many say they prefer free online services supported by targeted ads (61%) over online services that they pay for but come with no targeted ads (33%).