Research into mobile users' privacy attitudes

Key findings from Malaysia and Indonesia

Conducted by

futuresight

July 2013

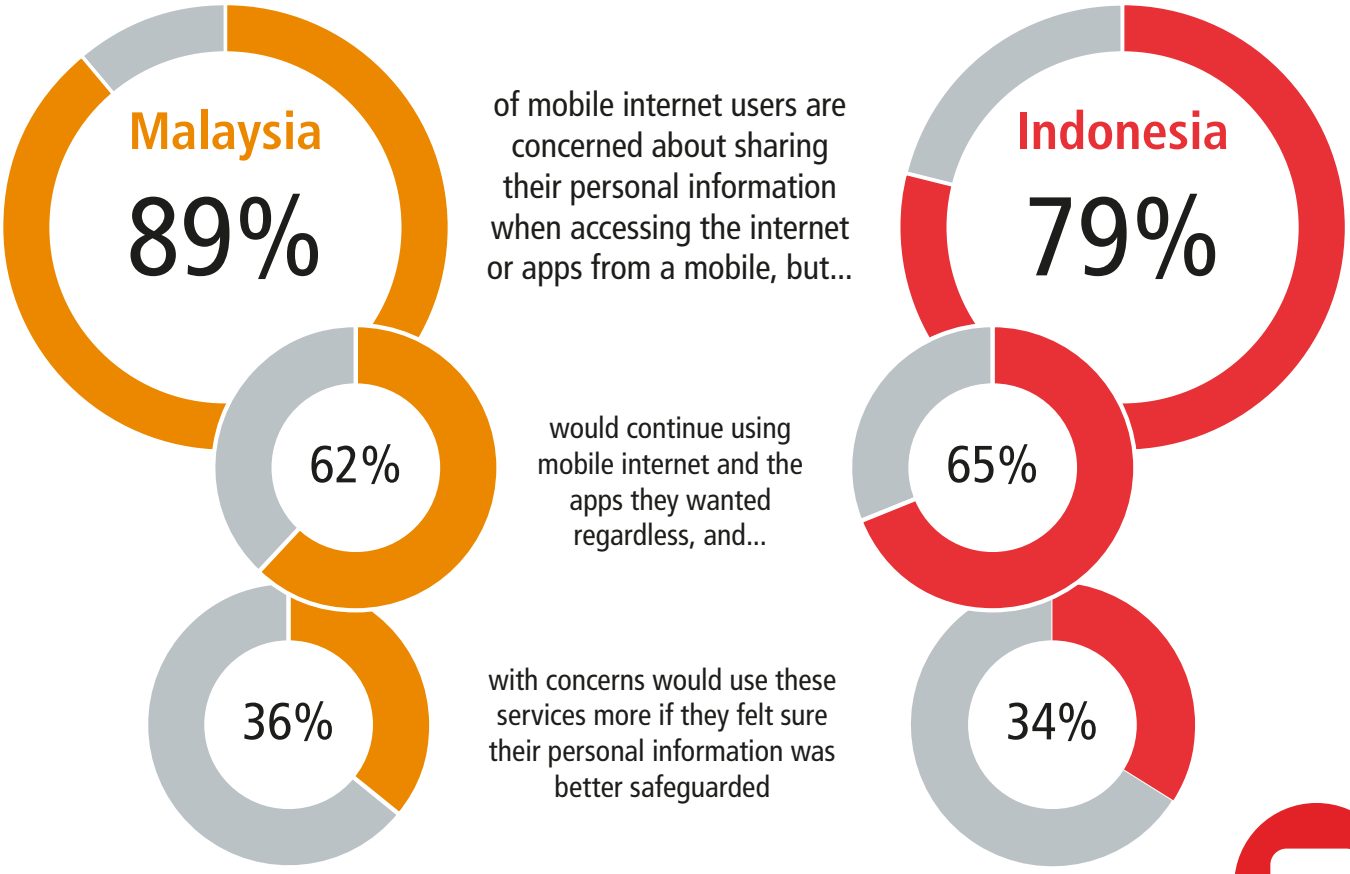
In association with:

axiata celcom XL

With support from:

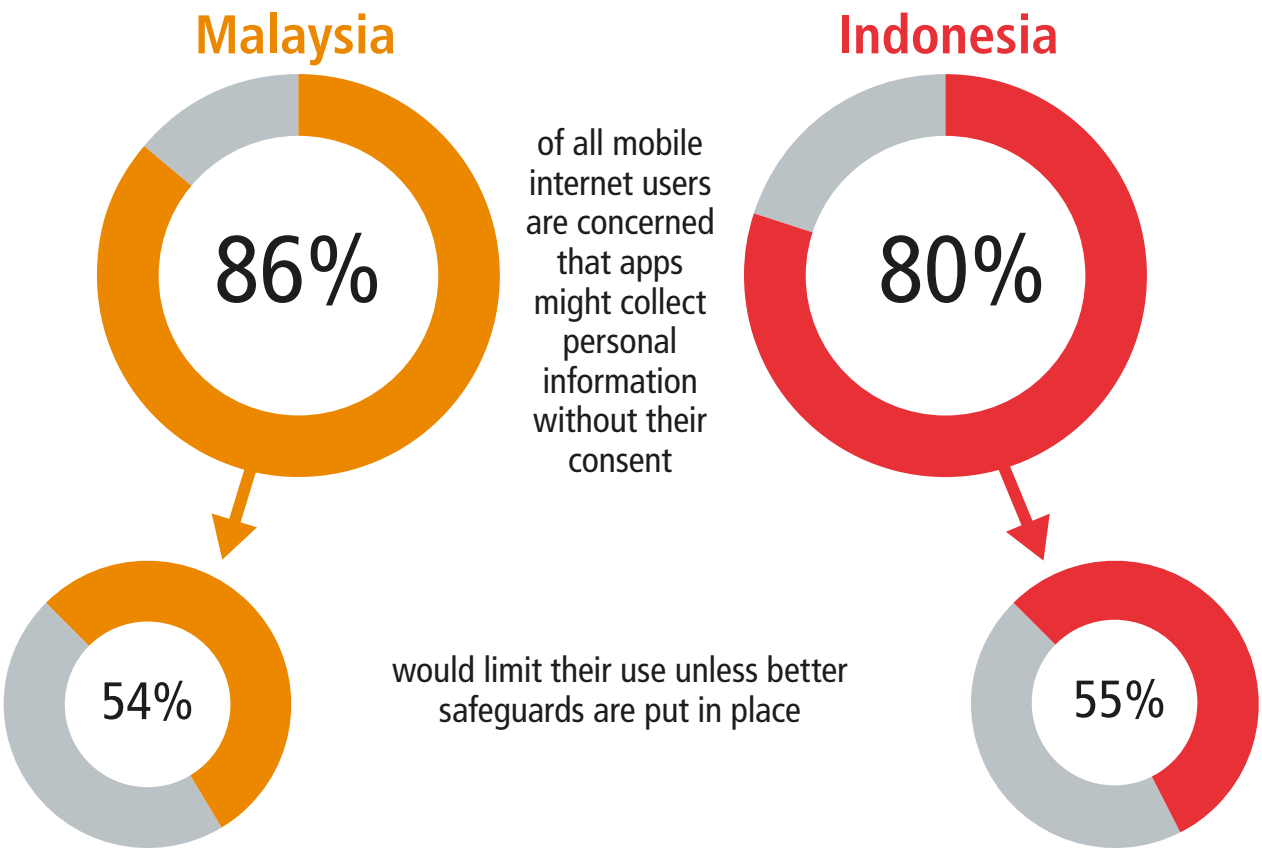
telenor group DiGi

Mobile internet users have privacy concerns and want to know their personal information is safe

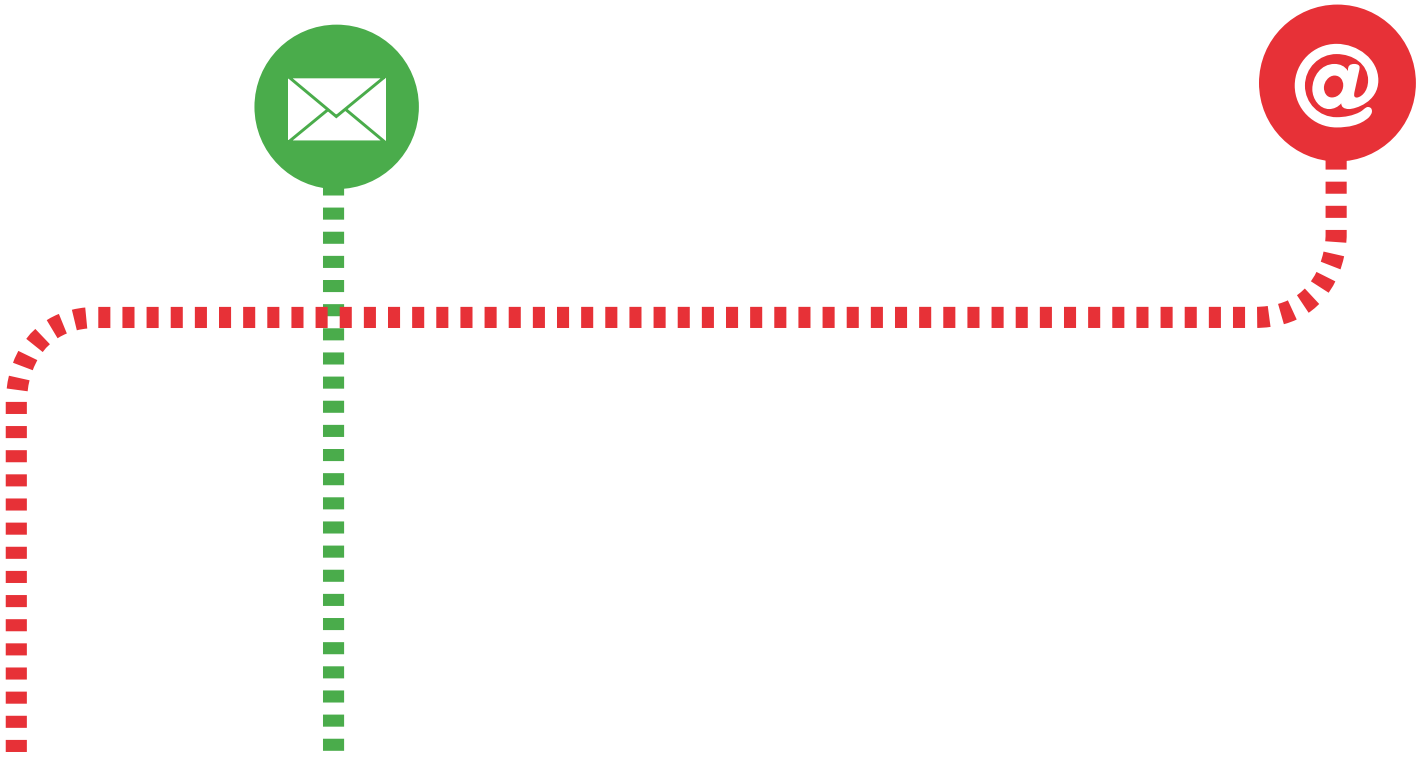


Base 1: All mobile internet users - Malaysia = 1,350; Indonesia = 1,402
Base 2 & 3: All mobile internet/app users with concerns - Malaysia = 1,203; Indonesia = 1,112

Mobile internet users with app-related privacy concerns are likely to use apps more if they felt sure their information was safe



Base 1: All Sample B mobile internet users - Malaysia = 692; Indonesia = 701
Base 2: All Sample B mobile internet users with concerns - Malaysia = 593; Indonesia = 561



Most mobile users want apps to ask them before collecting their personal data

Malaysia

Indonesia

of mobile app users think it is important to choose whether apps can collect their personal information

86% Malaysia

78% Indonesia

Base: All Sample B mobile app users - Malaysia = 688; Indonesia = 673

Mobile users are mostly concerned about sharing their credit card details

Malaysia

Credit card details	90%
Personal information from social networking profile	68%
Exact location of your mobile	62%
Mobile number	62%
Unique mobile number	59%
Postal address	58%
Photos	55%
Browser history	49%
List of calls and texts	48%
Address book contacts	46%
Demographic information	41%
Name	39%
Email address	39%

Indonesia

Credit card details	77%
Mobile number	47%
Personal information from social networking profile	45%
Unique mobile number	42%
Exact location of your mobile	41%
Address book contacts	40%
List of calls and texts	37%
Browser history	33%
Email address	33%
Postal address	29%
Photos	29%
Demographic information	28%
Name	23%

Base: All mobile users - Malaysia = 1,504; Indonesia = 1,527

"I do think about my personal information being stolen occasionally. But it doesn't affect how I use my phone. I just use what I want and don't think about it that much. I'm more concerned about losing my phone."

Male, 25 years, Malaysia

"It depends on the information being shared. If it's about me and my interests, then possibly, if I like the app. But my contact lists, definitely not. It would have to be made very clear what information is being shared and why. Then I don't have such a problem with the idea."

Female, 37 years, Malaysia

"My mobile is the medium for me to stay connected, to share and communicate with my social network. I don't need privacy on my mobile because I need to share and be shared, be that photos or what I do and like. So mobile for me is about socialising, sharing, communicating, feeling narcissist, and privacy is not needed."

Female, 22 years, Indonesia

"When I download an app or when I'm out and about, I'm careful with making sure the settings are right. Someone I know got kidnapped so now I'm wary of giving out my location and only do it when I want my friends to know."

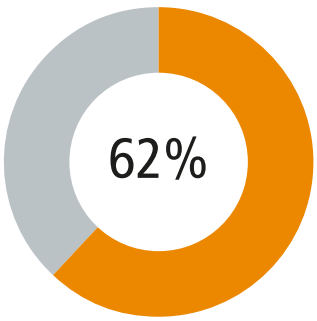
Female, 33 years, Indonesia

"I'm very careful about sharing – I work for a bank and I know how this information can go about. Sometimes you have to share but that's when you need something like a bank card, or job or new place to live. But most of the time, I will say no. It's best to be offered the choice and then you can make the right decision."

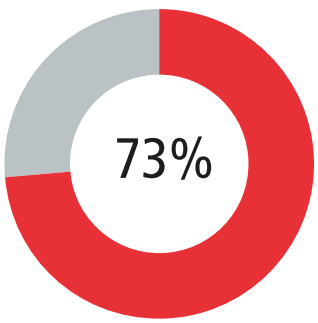
Male, 32 years, Indonesia

Two in three mobile app users check what info an app wants to access before installing it

Malaysia



Indonesia

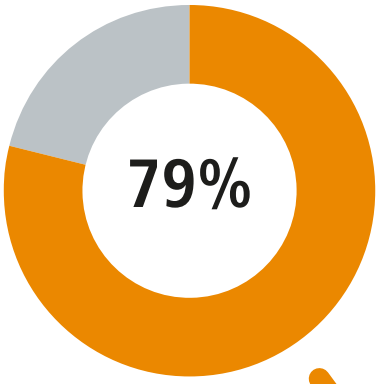


try to find out what information an app wants to use and why before installing

Base: All mobile app users - Malaysia = 1,337; Indonesia = 1,363

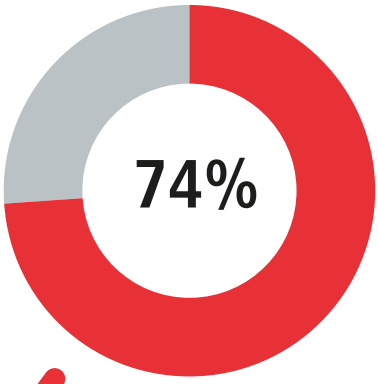
Mobile internet users "agree" to privacy policies without reading them, as they are "too long"

Malaysia



would regularly "agree" to a privacy statement on their mobile without reading it

Indonesia



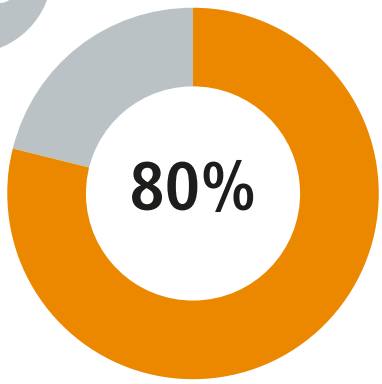
79%

of those who "agree" to privacy statements without reading them said it is because they are "too long"

Base 1: All mobile users who have ever registered to use an online site or downloaded an app on their mobile - Malaysia = 1,439; Indonesia = 1,466
Base 2: All who always, often or sometimes agree to user agreement/privacy policy on their mobile without reading it - Malaysia = 1,135; Indonesia = 1,089

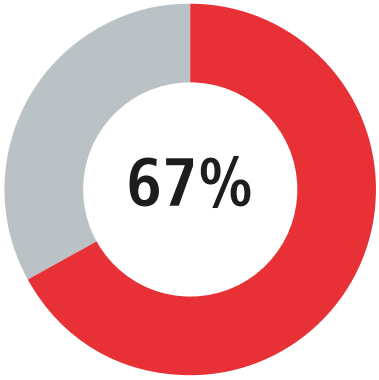
Mobile users want 3rd parties to seek permission before using their personal data

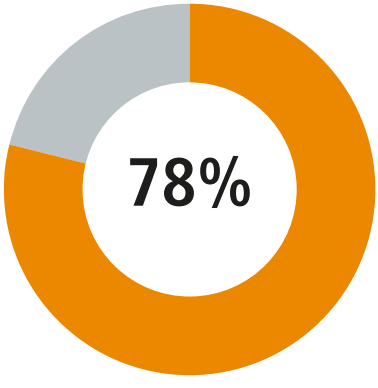
Malaysia



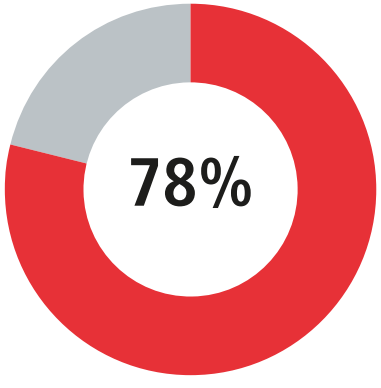
think it is important for 3rd parties to seek permission before using their personal data

Indonesia





would like to know when and what type of personal information is being collected



Base 1 & 2: All mobile users - Malaysia = 1,504; Indonesia = 1,527

Mobile internet users want choice and control over what ads they receive on their devices and how often

Malaysia

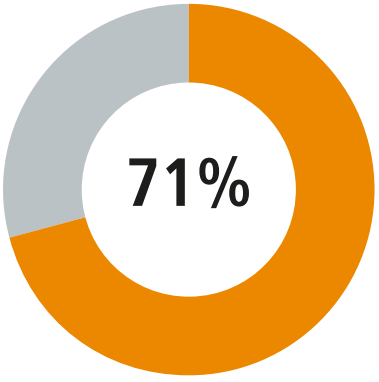
Indonesia

of mobile internet users want to set their own preferences for the types and timing of ads they receive on their mobile device

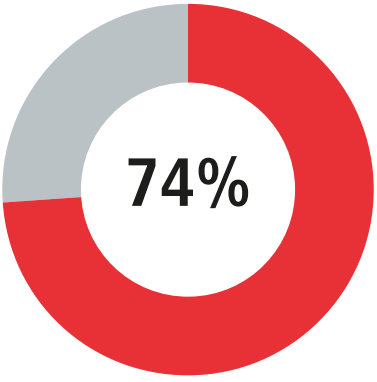
Base: All mobile internet users - Malaysia = 1,350; Indonesia = 1,402

The majority of users would willingly share more personal information and accept targeted ads if companies asked for their permission first

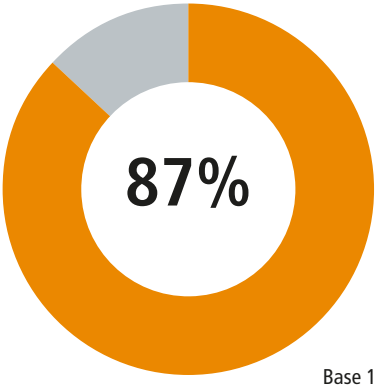
Malaysia

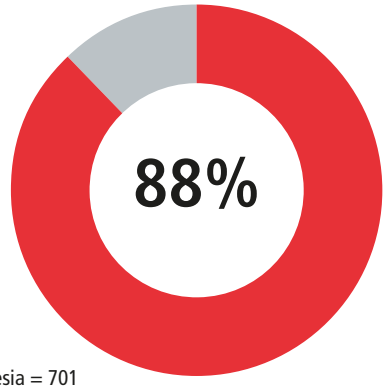


Indonesia



of mobile internet users would consider receiving targeted location-based advertising from a company that asked for their permission





of mobile internet and app users think a privacy icon might encourage them to accept targeted ads

Base 1: All Sample A mobile internet users - Malaysia = 658; Indonesia = 701
Base 2: Base: All mobile internet users - Malaysia = 1,350; Indonesia = 1,402

"I don't have a problem sharing information if I know I'm going to get something valuable in return. I'll fill out surveys or whatever because generally I think my information will help me get a better service. But I won't share anything with a company I don't know."

Male, 27 years, Malaysia

"I like the idea of a kite mark or something simple like that. I never read all those long privacy statements, when you want an app you just want to download it and so all you do is click next until you get it. The kite mark could be something like the banking security thing which could be good - a simple way to manage the information I want to share with others and it will help me to choose the apps more easily."

Male, 29 years, Indonesia

"I sometimes read a privacy policy but I never finish them – they're always too long. I like the idea of screen prompts – I certainly don't want to share any information with companies that I don't know, particularly advertisers. They're only in it for the money but at least with a prompt I have the choice and I know what's going on."

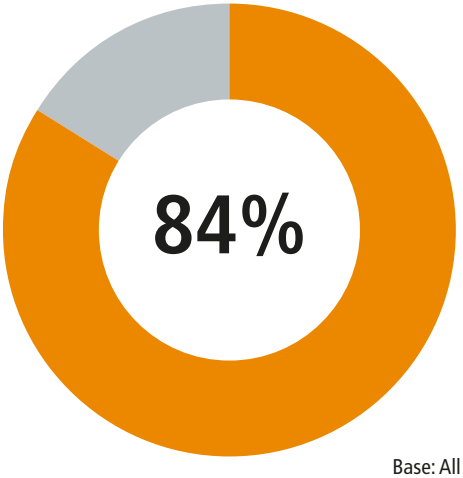
Male, 31 years, Malaysia

"I think information like phone number, marital status, birthday, email and home address is personal and I won't share that information unless I have to. I need a very clear reason why I need to share my details – I used to be more carefree but now I'm much more cautious. I think it's too easy for fraudsters to get your details."

Female, 32 years, Indonesia

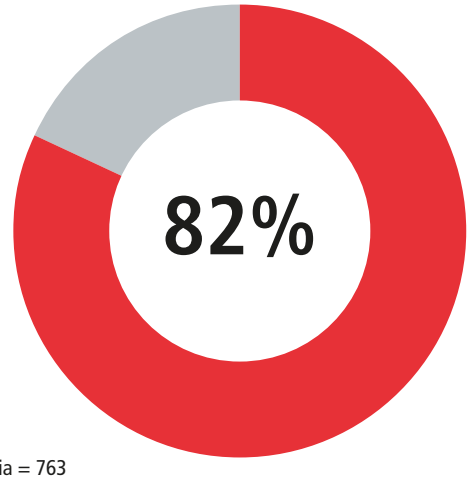
Overall, mobile users want to be asked first before the location of their mobile device is shared with a service or an app

Malaysia



want to be asked for their permission to share their location with a service or an app

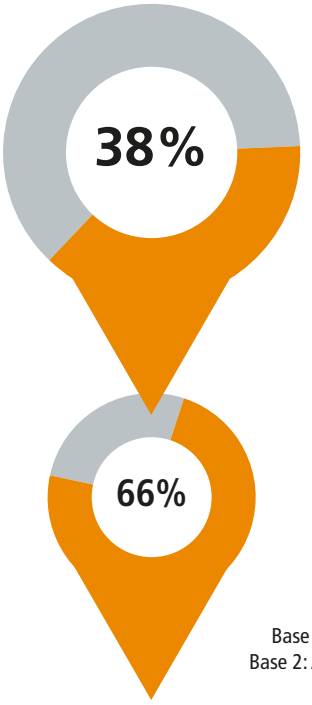
Indonesia



Base: All Sample A mobile users - Malaysia = 751; Indonesia = 763

The more familiar users are with location-based promotions, the more valuable they consider these to be

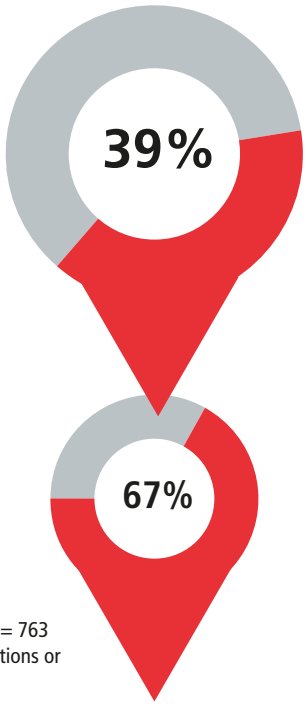
Malaysia



of mobile internet users are familiar with location-based promotions or advertising

of those familiar with these services think they are valuable

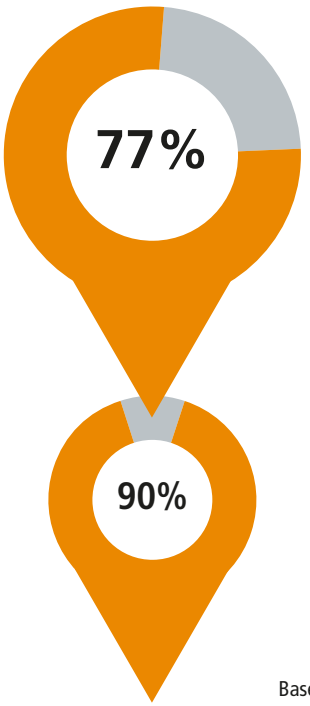
Indonesia



Base 1: All Sample A respondents - Malaysia = 751; Indonesia = 763
Base 2: All Sample A respondents who find location based promotions or advertising valuable - Malaysia = 329; Indonesia = 363

Likewise, regular users of location-based promotions find them valuable, but still want to be able to turn them off or on

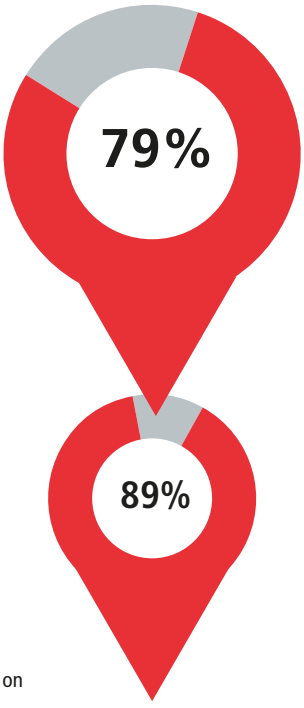
Malaysia



of those who regularly use location-based services find them valuable

of those users would like to be asked for permission before sharing their location with a service or an app

Indonesia



Base: All Sample A mobile users using location-based services on mobile regularly - Malaysia = 526; Indonesia = 533

> ***I think it's dangerous people knowing where I am. I can see it's useful sometime but if I do use it I'll turn off the GPS immediately afterwards.***

Female, 33 years, Malaysia

> ***I use these apps all the time – to find ATM or restaurants – they're great and I have no problem sharing my location and other information to get these free apps.***

Male, 24 years, Indonesia

> ***It's all about having control – if I give permission to a shop I like to send me offers when I'm out shopping and close to the store, that's fine. It's not fine to receive advertising that is unsolicited, from companies I don't know. It's not nice to think that someone you don't know knows where you are – it feels like someone is stalking you.***

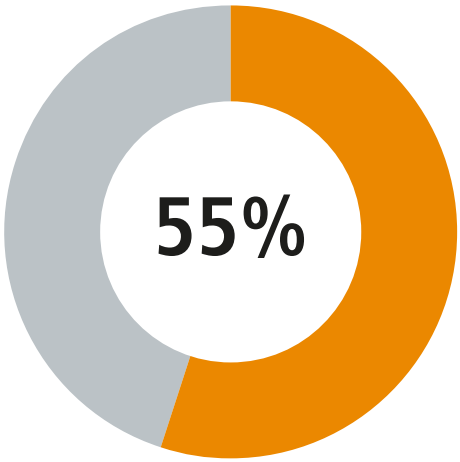
Female, 27 years, Malaysia

> ***So long as I can switch this on and off, I really like this. I get text promotions and they're usually rubbish. If I can sign up and get these from shops I want when I'm shopping, this is brilliant.***

Female, 26 years, Indonesia

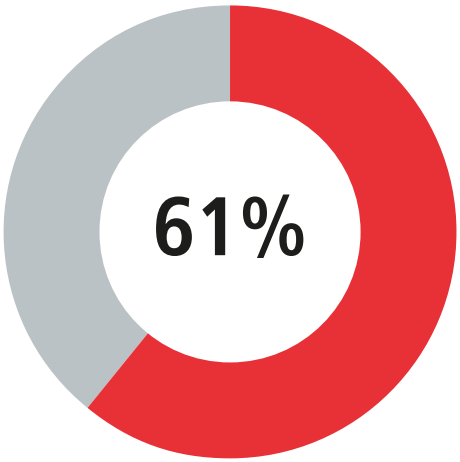
The majority of mobile users think their mobile operator is responsible for safeguarding their privacy even when the operator has no actual control…

Malaysia



of all users think their mobile operator is responsible for safeguarding their personal information when they download an app from an independent store

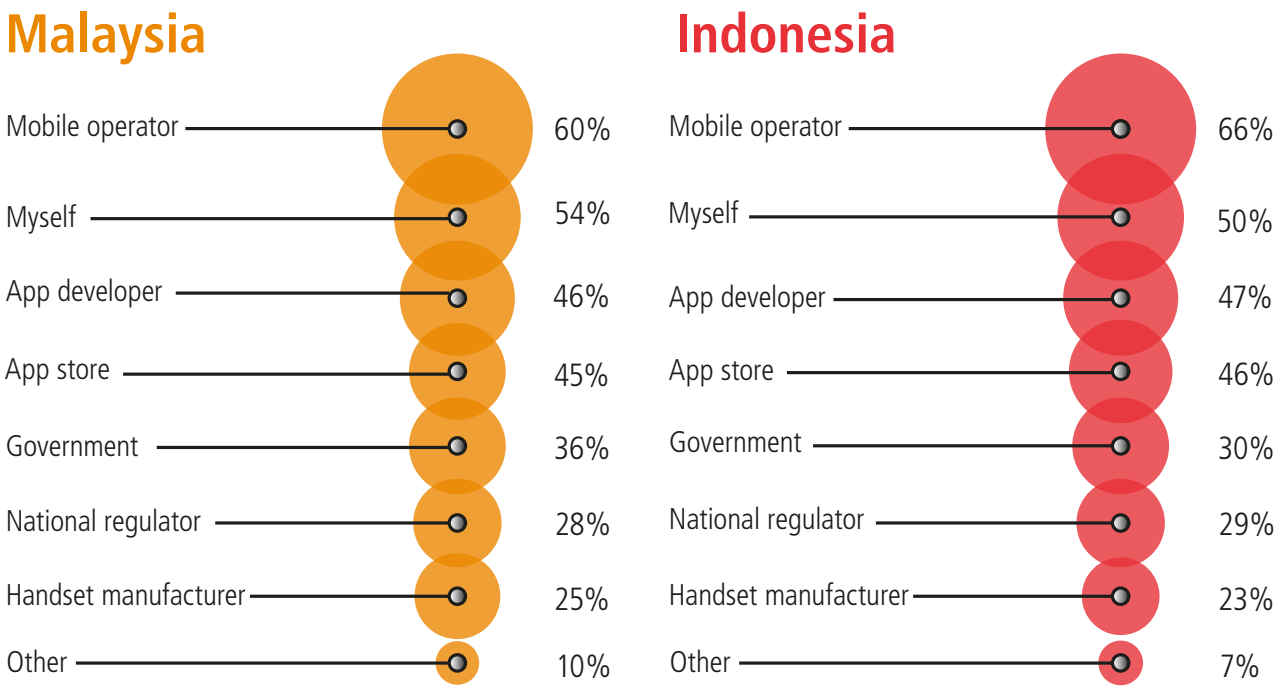
Indonesia



Base: All mobile users - Malaysia = 1,504; Indonesia = 1,527

… and hold their mobile operator accountable if their personal information is used in ways they did not expect or feel they had not agreed to

Who people think should be held accountable when their privacy has been breached

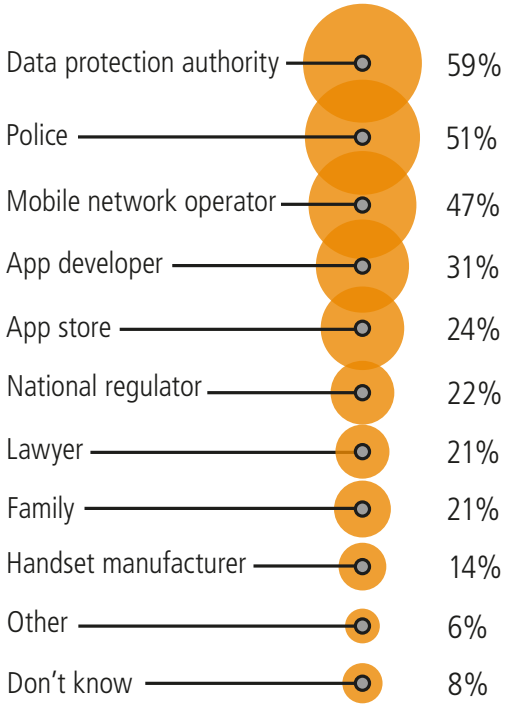


Base: All mobile users - Malaysia = 1,504; Indonesia = 1,527

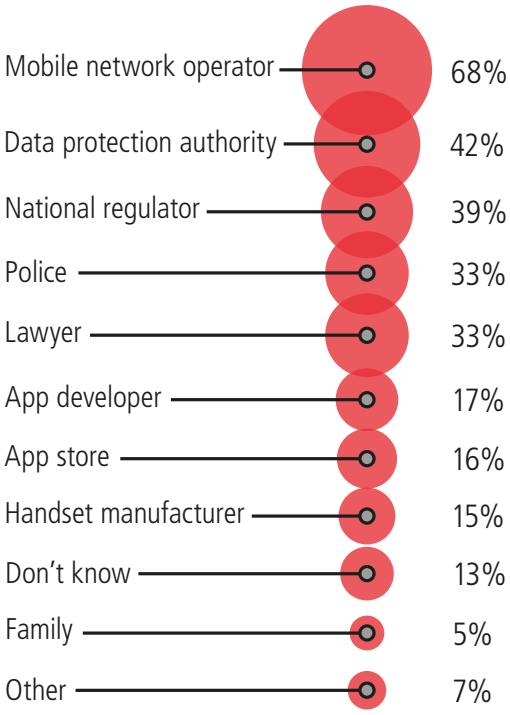
Mobile users look to their regulators and mobile operators for help when their privacy is invaded…

Who people would contact if they suffered a serious invasion of privacy while using a mobile app

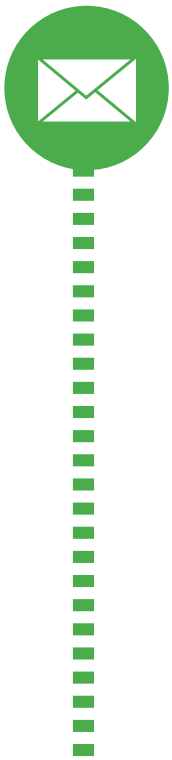
Malaysia



Indonesia

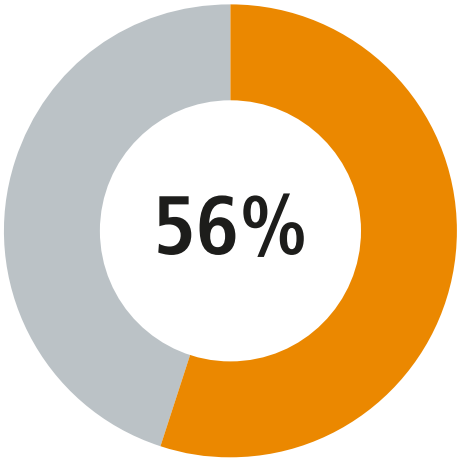


Base: All mobile users - Malaysia = 1,504; Indonesia = 1,527



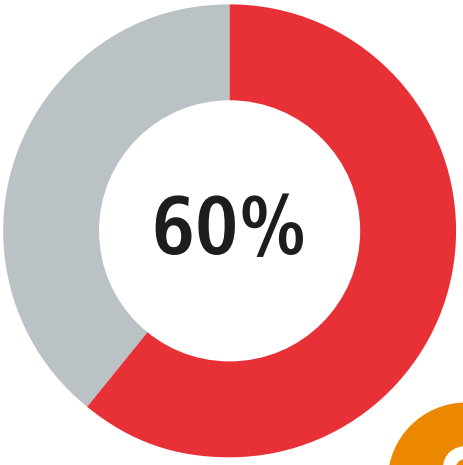
…and want the same rules to apply to any company accessing their location, irrespective of how they obtain this information

Malaysia



of users think that a consistent set of rules should apply to any company that has access to their location, irrespective of how they obtain this information

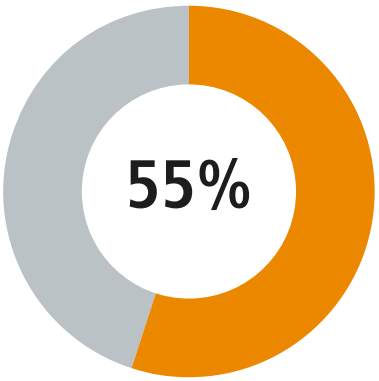
Indonesia



Base: All Sample A mobile users - Malaysia = 751; Indonesia = 763

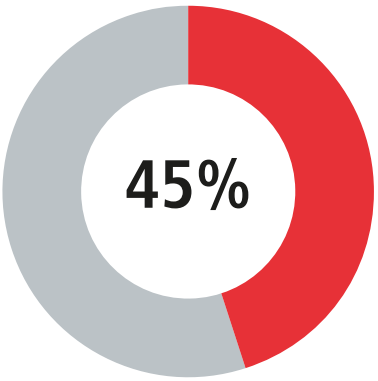
One in two mobile users are uneasy about companies holding and using their personal information overseas

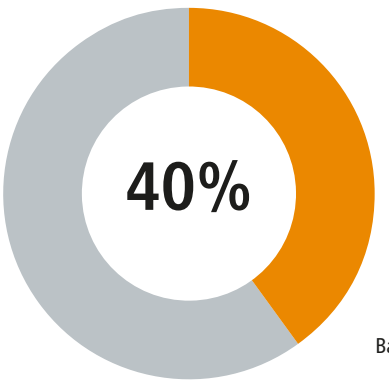
Malaysia



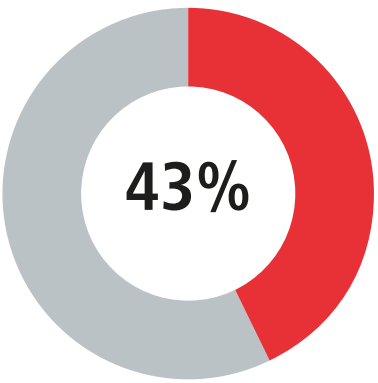
have concerns about companies holding and using their personal information overseas

Indonesia





want companies to ask permission before using their personal information overseas



Base: All respondents - Malaysia = 1,504; Indonesia = 1,527

"I think the burden of responsibility should be spread across the account holder, the service provider and the app developer. It's a hand in hand relationship and all parties have to offer the same level of protection. There's no point in my having sophisticated passwords if their servers are not protected."

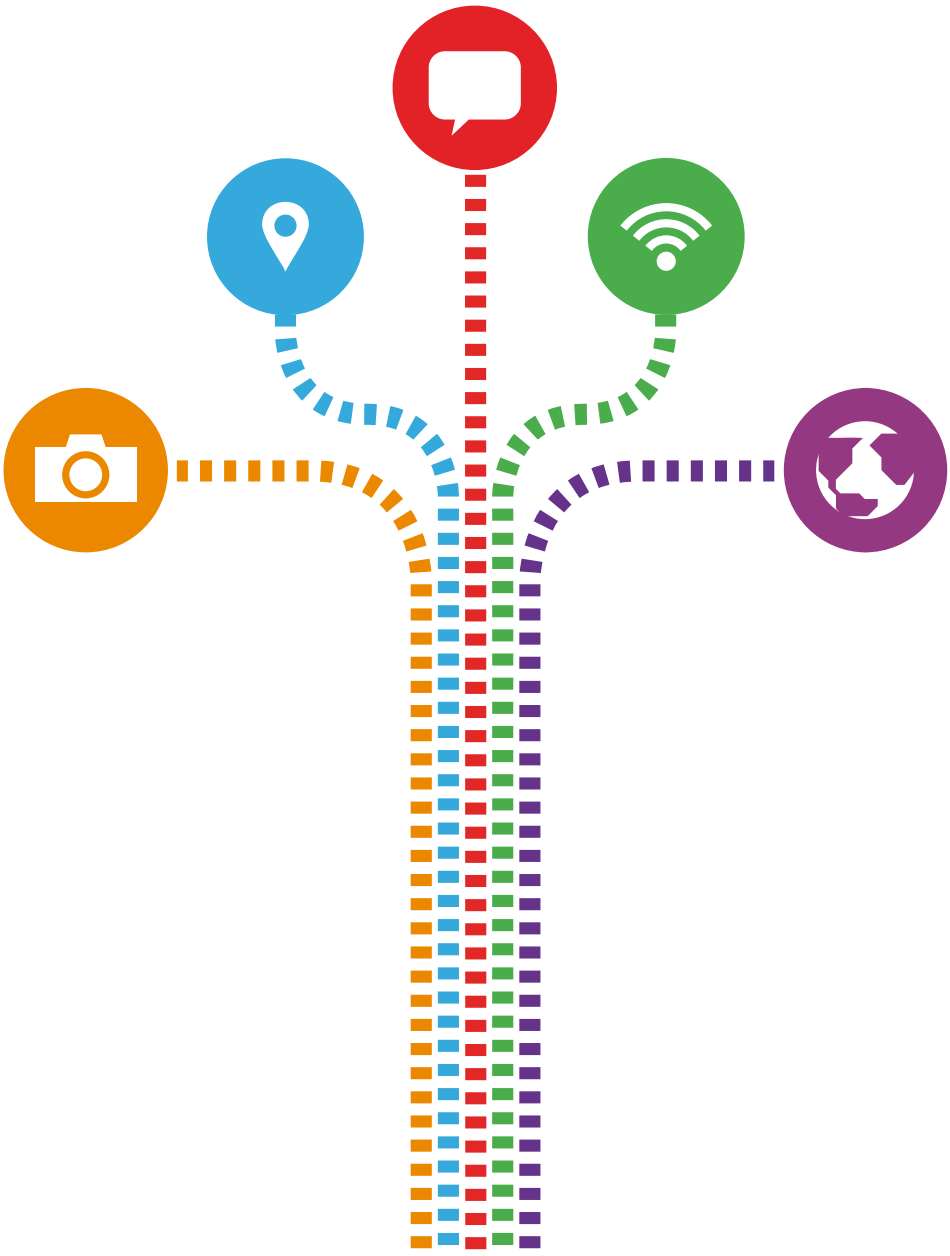
Male, 27 years, Malaysia

"I've never really thought that anyone apart from my friends would be interested in where I am. Now you mention it, I definitely would like companies to ask for permission – I don't want a whole load of advertising from companies I'm not interested in."

Female, 29 years, Indonesia

"I think that big companies, major brands, do look after your information and you shouldn't have to worry. If I hand over information to an agency for a job, then I'd expect them to look after my information too. It all depends on what company you're sharing with – the big companies should behave because they've got a lot to lose."

Female, 26 years, Indonesia



For more information contact:

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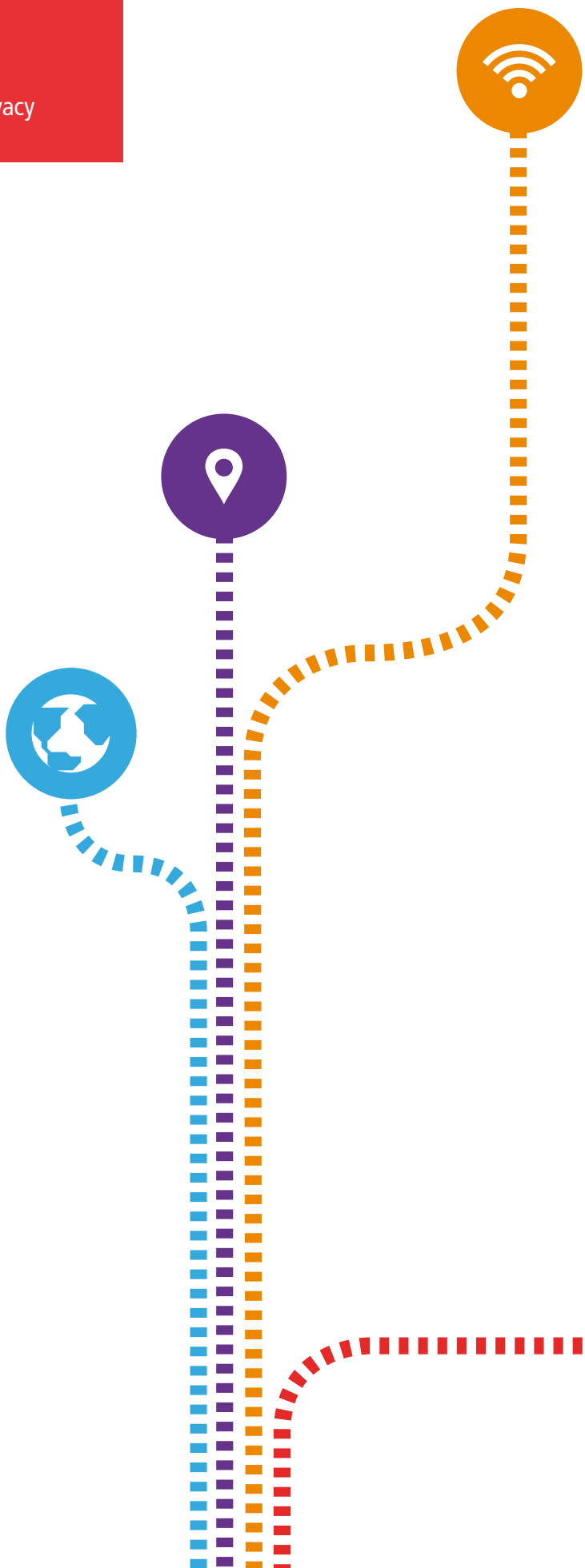
www.gsma.com/mobileprivacy



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