GSMA Research into mobile users’ privacy attitudes

Key findings from Brazil

Conducted by futuresight in November 2012
Background and objectives

Background

- The GSMA represents the interests of the worldwide mobile communications industry. Spanning 219 countries, the GSMA unites nearly 800 of the world's mobile operators, as well as more than 200 companies in the broader mobile ecosystem, including handset makers, software companies, equipment providers, Internet companies, and media and entertainment organisations.

- The GSMA launched a mobile privacy initiative in January 2011 that includes exploring ways to provide users with contextually relevant mobile friendly ways to manage their privacy and information on mobile devices.

Objectives

- This research programme was commissioned to help understand what, if any, privacy concerns users of mobile devices have and how these influence attitudes towards and the take up of, mobile internet services and apps.

- The research will help shape the development of policy and help support the development of effective and consistent privacy experiences that help users become familiar with ways to manage their privacy on mobile devices.

- To date, this research has been conducted in Spain, UK, Singapore, Mexico, Brazil and Colombia and is based on the responses of more than 8,500 mobile users. This presentation highlights the key findings from Brazil (November 2012).
Method and Sample – Research in Brazil

Method

- The research in Brazil was conducted in 2 parts, in November 2012
  - Online quantitative survey (with a total sample of 1,505 mobile users in Brazil of which 64% were smartphone users)
  - Small scale face to face interviews (n=20) with mobile Internet and app users to add qualitative diagnostics to the quantitative results

Sample

- The sample was broadly representative in terms of demographics (age, gender, social grade and region), albeit older age groups were slightly under-represented, as is common with online panels
- Similarly, the sample was also representative of the supply side in Brazil, i.e. handset manufacturer brands, payment models and mobile network operators
- In terms of usage however, the sample was biased towards more sophisticated users – 70% were users of the mobile Internet and apps, of which 40% were heavy users
Sample overview (Brazil)

<table>
<thead>
<tr>
<th>Sample overview</th>
<th>Brazil</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total sample</td>
<td>1,505 mobile users</td>
</tr>
<tr>
<td>Smartphone users</td>
<td>64 %</td>
</tr>
<tr>
<td>Gender</td>
<td>45% Male / 55% Female</td>
</tr>
<tr>
<td>Age</td>
<td>Good representation of 18-54 (55+ under represented)</td>
</tr>
<tr>
<td>Operator</td>
<td>Tim (34%); Vivo (24%); Oi (22%); Claro (19%)</td>
</tr>
<tr>
<td>Handset manufacturer</td>
<td>Nokia (28%); Samsung (24%); LG (15%); Motorola (11%); Apple (4%); Sony Ericsson (3%); Blackberry (2%)</td>
</tr>
<tr>
<td>Payment method</td>
<td>Contract (28%); PAYG (72%)</td>
</tr>
</tbody>
</table>
Mobile internet users have privacy concerns and want to know their personal information is safe

86% of mobile internet users had concerns about sharing their personal information when accessing the internet or apps from a mobile, but...

- 66% would continue using mobile internet and the apps they wanted regardless, and
- 32% with concerns would use these services more if they felt sure their personal information was better safeguarded
Most mobile internet users are cautious about who they share their personal information with.

- **Brazil**
  - 88% thought that safeguarding their personal information was very important.
  - 81% were very selective to whom they give their information.

Base: All respondents (Brazil – 1,505)
Mobile users want choice and control over what ads to receive on their devices and how often

Brazil

78%

would like to set their own preferences for the types and timing of ads they receive on their mobile

Base: All respondents (Brazil – 1,505)
Only half of mobile users assume companies safeguard their information

Brazil

52% assumed companies look after their information and should not have to worry

Base: All respondents (Brazil – 1,505)
Mobile users want 3rd parties to seek their permission before using their personal data

Brazil

83%

thought it was important for 3rd parties to seek permission before using their personal data

Base: All respondents (Brazil – 1.505)
Most mobile users think companies would keep collecting their information against their wishes.

**Brazil**

34% were confident companies would stop collecting personal information if they decided to stop sharing.

Base: All respondents (Brazil – 1.505)
Mobile internet users “agree” to privacy statements without reading them… as they are “too long”

**Brazil**

51% 

I agree

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

74%

of those who “agree” privacy statements without reading... said it is because they are “too long”

Base 1: All mobile internet users who have signed up for a website or app (Brazil – 999)
Base 2: All mobile internet users who “agree” to privacy statements but rarely or never read them (Brazil – 509)
Two in three mobile app users check what info an app wants to access before installing it...

**Brazil**

69%

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

Base: All mobile app users (Brazil – 1.063)
Almost all mobile users want apps to ask them before collecting their personal data.

In Brazil, 89% of respondents thought it was important to choose whether apps can collect personal information without their consent.
Mobile app users with privacy concerns are likely to limit their use unless they feel more protected.

88% of all mobile app users in Brazil had concerns that apps might collect personal information without their consent.

49% would limit their use unless better safeguards are put in place.

Base 1: All Audience B mobile app users (Brazil – 541)
Base 2: All Audience B mobile app users with concerns (Brazil – 477)
Users would turn to their mobile operators if their privacy was invaded (regardless of who was responsible)

| Who people would turn to if they suffered a serious invasion of privacy whilst using a mobile app |
|--------------------------------------------------|-------------------------|
| Mobile operator                                  | 58%                    |
| Police                                           | 52%                    |
| Lawyer                                          | 46%                    |
| Data protection authority                        | 45%                    |
| App developer                                    | 34%                    |
| National regulator                               | 33%                    |
| App store                                        | 29%                    |
| Handset manufacturer                             | 15%                    |
| Family                                           | 7%                     |
| Other                                            | 6%                     |
| Don’t Know                                       | 4%                     |

Base: All respondents (Brazil – 1,505) – Results are % of users rating top 3 scores on a scale from 1-10
Most users of location-based promotions find them valuable...

Brazil

48% of mobile internet users were familiar with location based promotions

71% of those familiar with location based promotions, thought these services were valuable

Base: All Audience A mobile internet users (Brazil – 515)

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...but want to be able to turn them off or on

**Brazil**

- 48% of mobile internet users were familiar with location-based promotions.
- 79% of those familiar with location-based promotions would like to be able to turn them on or off.

Base: All Audience A mobile internet users (Brazil – 515)
Mobile users want to be asked for their permission before sharing their location with a service or app

Brazil

92% want to be asked permission to share their location with a service or an app¹

78% of those using location-based services (LBS) regularly are concerned at 3rd parties having access to their location without permission²

55% of users thought that a consistent set of rules should apply to any company that had access to their location³

1. Base: All Audience A users who have ever used LBS (n=544)  
2. Base: All Audience A users who use LBS regularly (n=348)  
3. Base: All Audience A users (n=752)