

# GSMA Research into mobile users' privacy attitudes

## Key findings from Brazil



Conducted by *futuresight* in November 2012

## 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

- 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

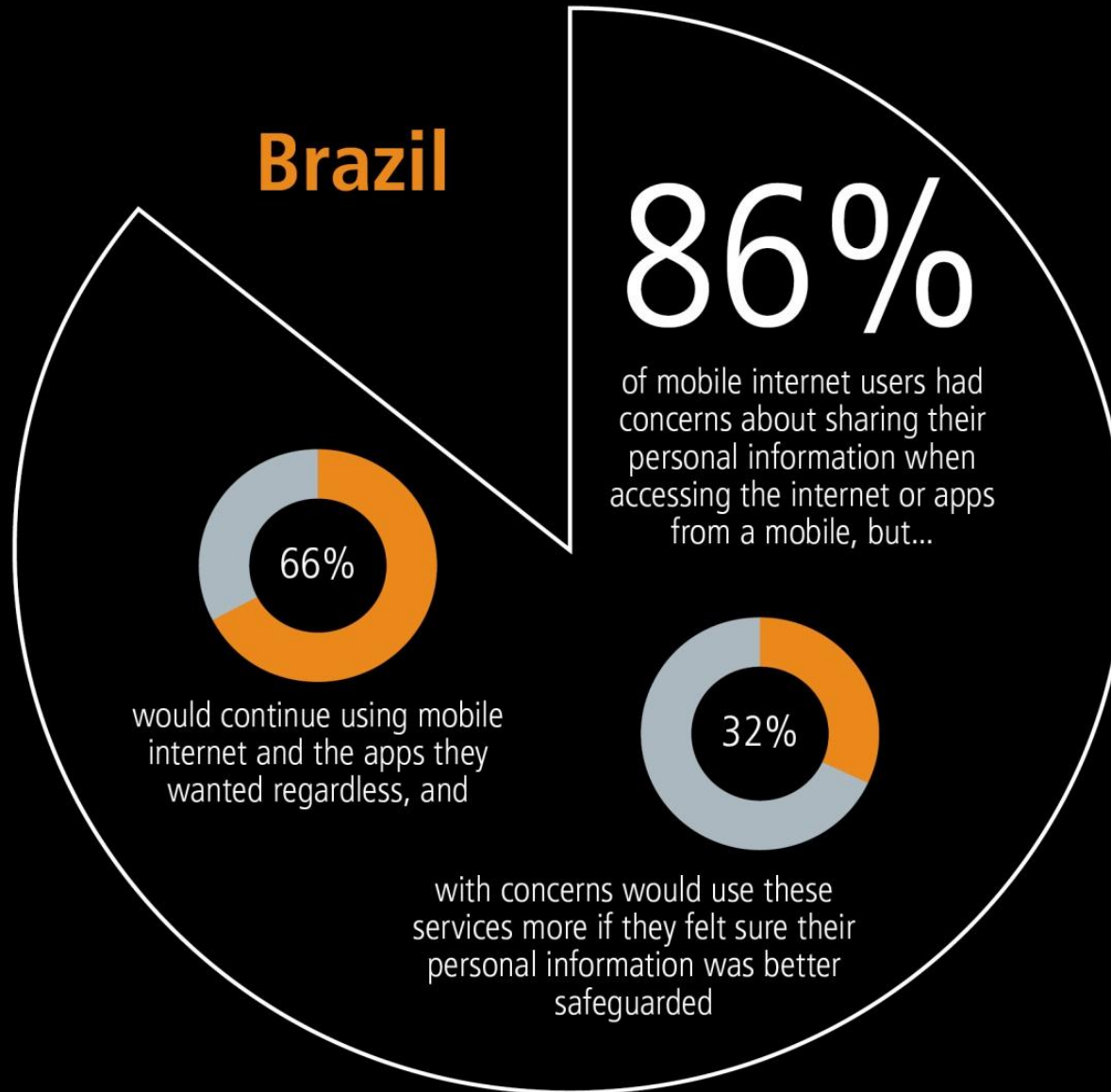
## Sample

- 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)

Sample overview	Brazil
Total sample	1,505 mobile users
Smartphone users	64 %
Gender	45% Male / 55% Female
Age	Good representation of 18-54 (55+ under represented)
Operator	Tim (34%); Vivo (24%); Oi (22%); Claro (19%)
Handset manufacturer	Nokia (28%); Samsung (24%); LG (15%); Motorola (11%); Apple (4%); Sony Ericsson (3%) Blackberry (2%)
Payment method	Contract (28%); PAYG (72%)

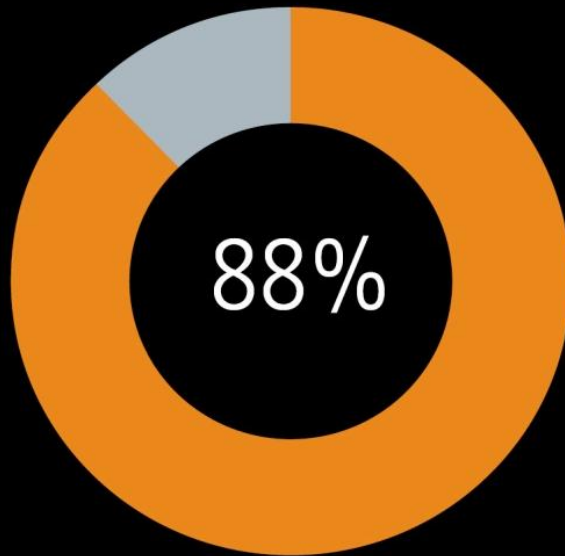
# Mobile internet users have privacy concerns and want to know their personal information is safe



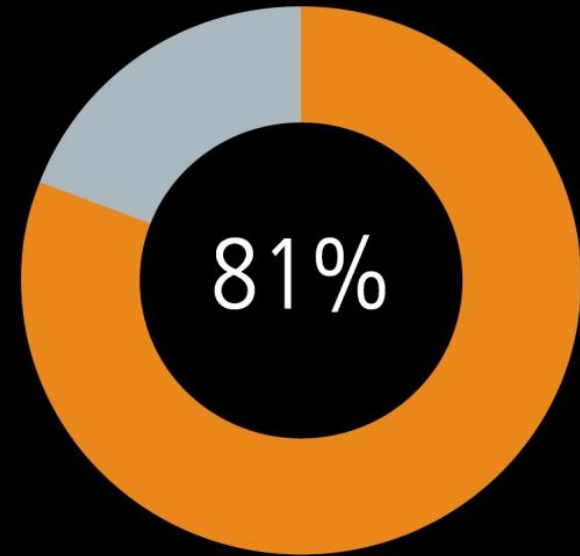
# Most mobile internet users are cautious about who they share their personal information with



## Brazil



thought that safeguarding their personal information was very important

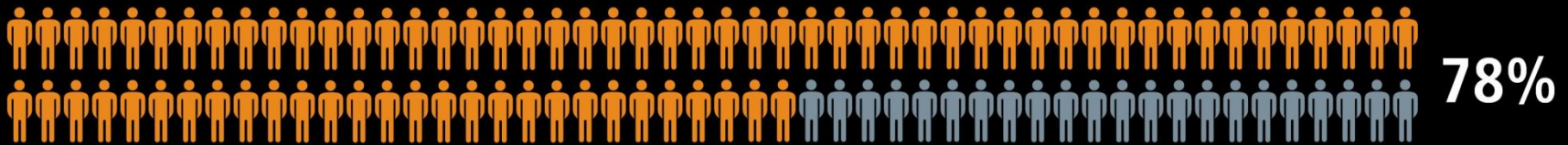


were very selective to whom they give their information

# Mobile users want choice and control over what ads to receive on their devices and how often



## Brazil



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

# Only half of mobile users assume companies safeguard their information





# Mobile users want 3<sup>rd</sup> parties to seek their permission before using their personal data

## Brazil



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

83%

# Most mobile users think companies would keep collecting their information against their wishes



## Brazil



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

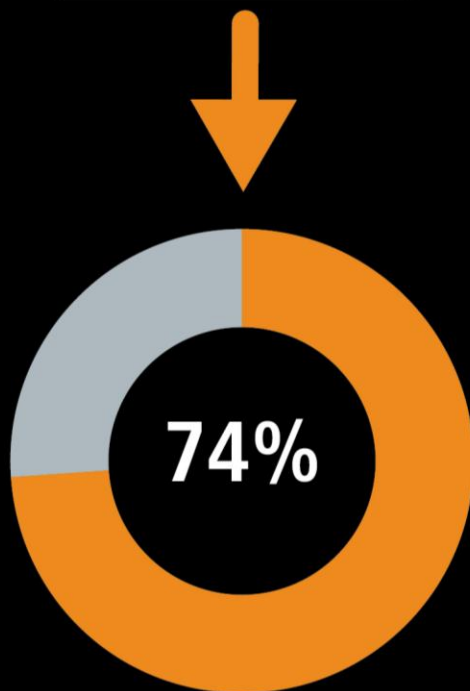
# Mobile internet users “agree” to privacy statements without reading them... as they are “too long”

**Brazil**

**51%**

**I agree**

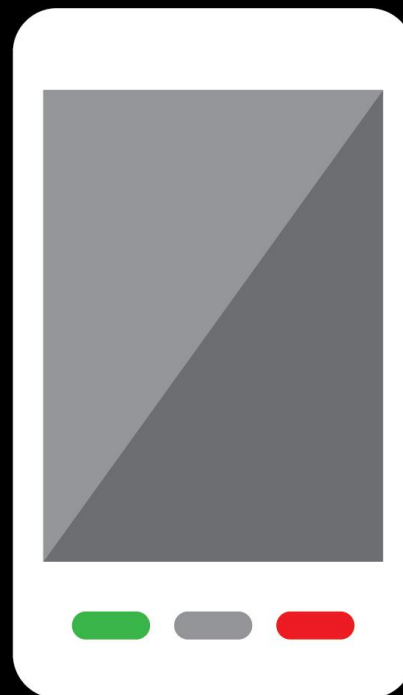
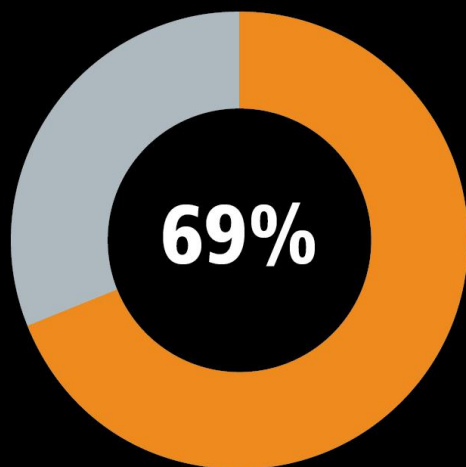
would regularly “agree” to a privacy statement on their mobile without reading it



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

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

## Brazil



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

# Almost all mobile users want apps to ask them before collecting their personal data

## Brazil



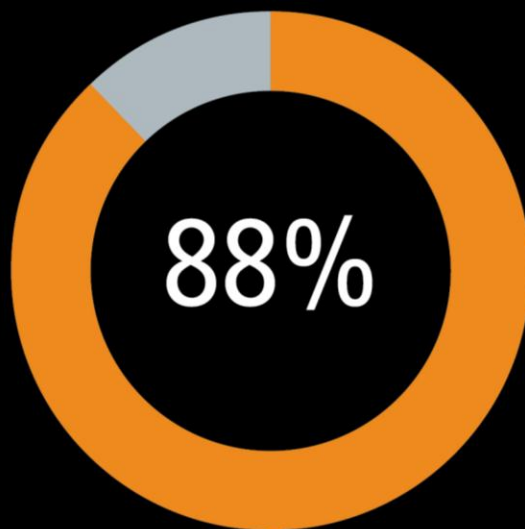
thought it was important to choose whether apps can collect personal information without their consent

# 89%

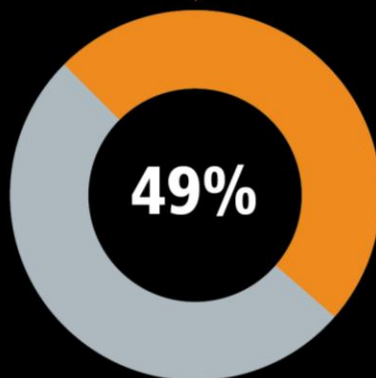
# Mobile app users with privacy concerns are likely to limit their use unless they feel more protected



## Brazil

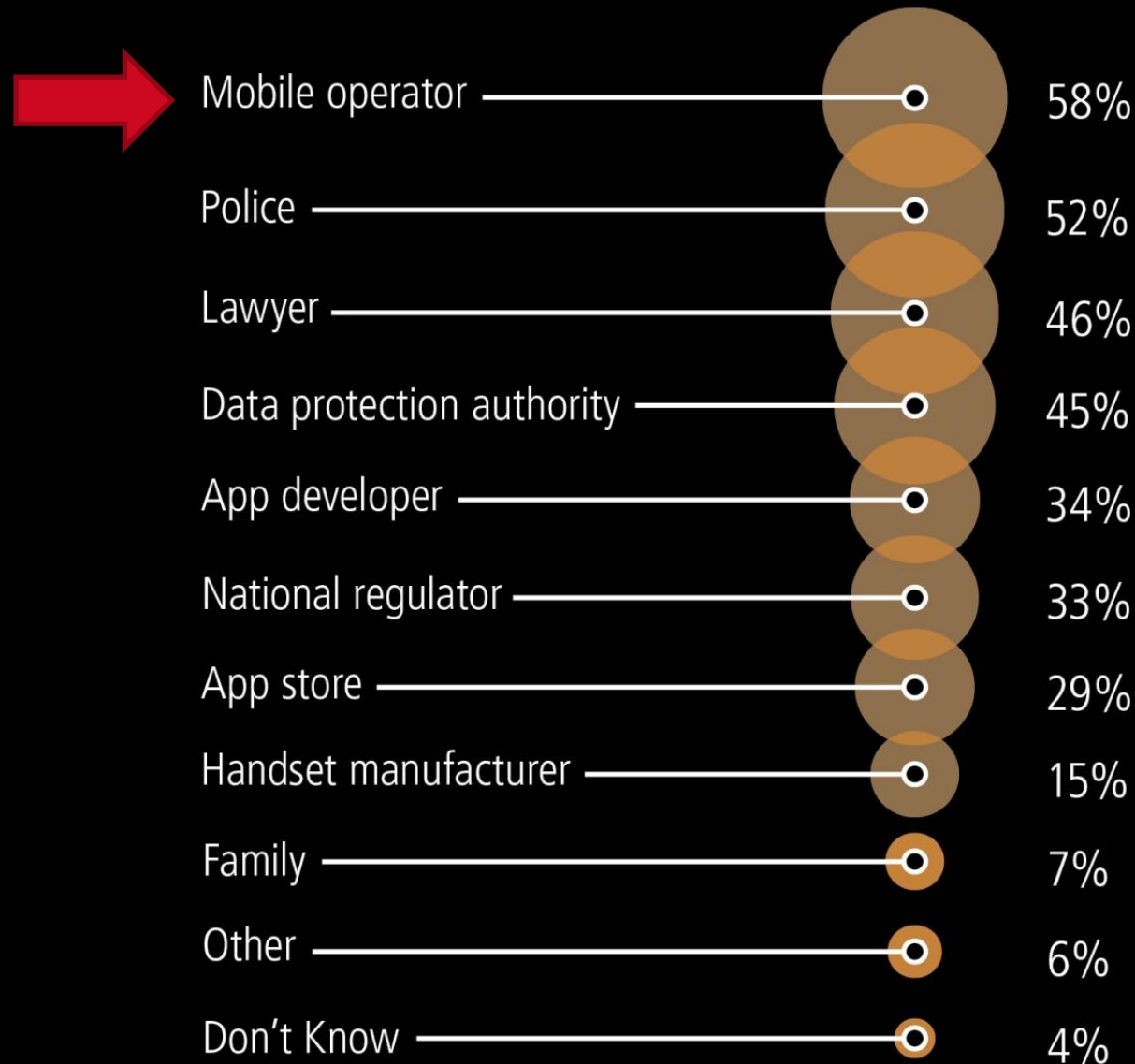


of all mobile app users had concerns that apps might collect personal information without their consent



would limit their use unless better safeguards are put in place

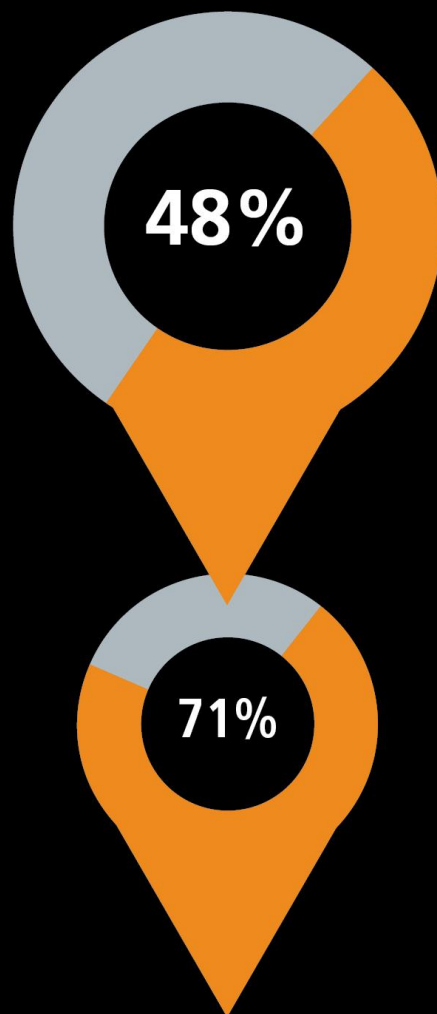
# Users would turn to their mobile operators if their privacy was invaded (regardless of who was responsible)



Who people would turn to if they suffered a serious invasion of privacy whilst using a mobile app

# Most users of location-based promotions find them valuable...

## Brazil



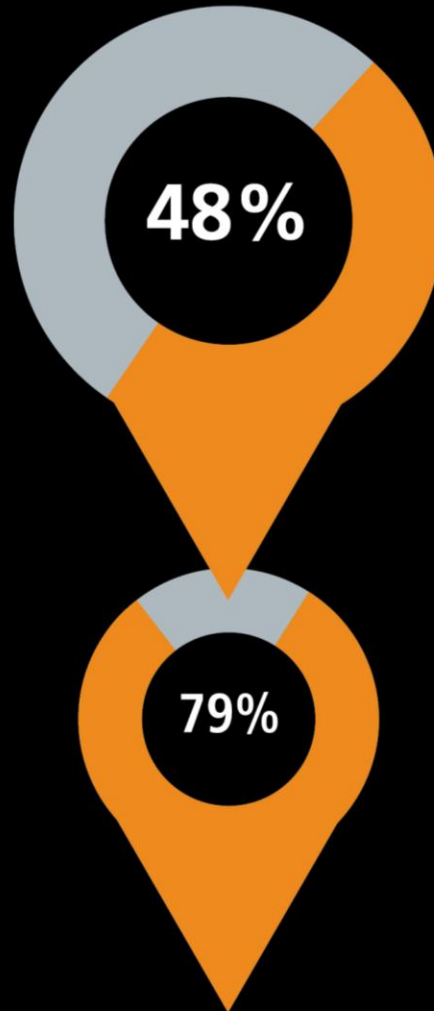
of mobile internet users  
were familiar with location  
based promotions

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



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

## Brazil



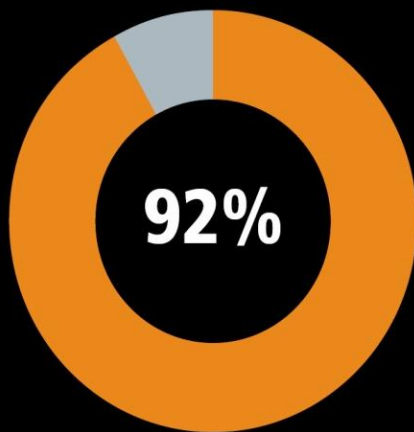
of mobile internet users were familiar with location-based promotions

of those familiar with location-based promotions would like to be able to turn them on or off

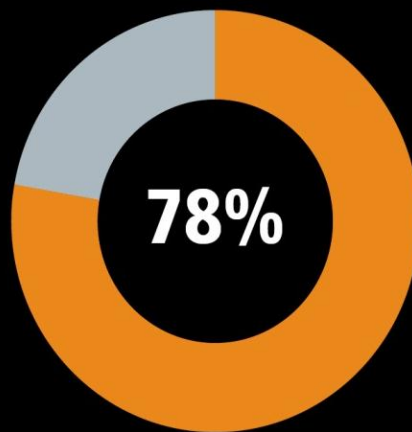
# Mobile users want to be asked for their permission before sharing their location with a service or app



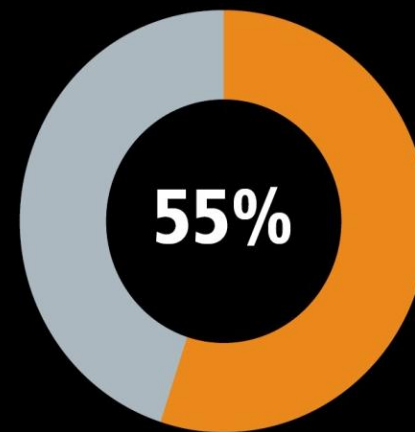
## Brazil



want to be asked permission to share their location with a service or an app<sup>1</sup>



of those using location-based services (LBS) regularly are concerned at 3<sup>rd</sup> parties having access to their location without permission<sup>2</sup>



of users thought that a consistent set of rules should apply to any company that had access to their location<sup>3</sup>