GSMA Research into mobile users’ privacy attitudes

Key findings from Mexico

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 Mexico (November 2012).
Method

- The research in Mexico was conducted in 2 parts, in November 2012
  - Online quantitative survey (with a total sample of 1,503 mobile users of which 76% were smartphone users)
  - Small scale face to face interviews (n=20 in) 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 Mexico, i.e. handset manufacturer brands, payment models and mobile network operators
- In terms of usage however, the sample was heavily biased towards more sophisticated users – 84% were users of the mobile Internet and apps, over half of whom were heavy users
## Sample overview (Mexico)

<table>
<thead>
<tr>
<th>Sample overview</th>
<th>Mexico</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total sample</td>
<td>1,503 mobile users</td>
</tr>
<tr>
<td>Smartphone users</td>
<td>76 %</td>
</tr>
<tr>
<td>Gender</td>
<td>60% Male / 40% Female</td>
</tr>
<tr>
<td>Age</td>
<td>A bias towards younger age groups (83% 18-44 years old)</td>
</tr>
<tr>
<td>Operator</td>
<td>Claro/Telcel (78%); Movistar (10%); Iusacell (7%)</td>
</tr>
<tr>
<td>Handset manufacturer</td>
<td>Nokia (24%); Samsung (18%); Blackberry (14%); LG (11%);</td>
</tr>
<tr>
<td></td>
<td>Apple (10%); Sony (8%)</td>
</tr>
<tr>
<td>Payment method</td>
<td>Contract (44%); PAYG (56%)</td>
</tr>
</tbody>
</table>
Mobile internet users have privacy concerns and want to know their personal information is safe

Mexico

81% of mobile internet users had concerns about sharing their personal information when accessing the internet or apps from a mobile, but...

- 61% would continue using mobile internet and the apps they wanted regardless, and
- 37% with concerns would use these services more if they felt sure their personal information was better safeguarded

Base: All mobile internet users, Mexico; 1,261
Most mobile internet users are cautious about who they share their personal information with.

**Mexico**

- 85% thought that safeguarding their personal information was very important.
- 79% were very selective to whom they give their information.

Base: All respondents (Mexico – 1,503)
Mobile users want choice and control over what ads to receive on their devices and how often

**Mexico**

75% would like to set their own preferences for the types and timing of ads they receive on their mobile

Base: All respondents (Mexico – 1,503)
Less than half of mobile users assume companies safeguard their information

Mexico

43% assumed companies look after their information and should not have to worry

Base: All respondents (Mexico – 1,503)
Mobile users want 3rd parties to seek their permission before using their personal data.

Mexico

79% thought it was important for 3rd parties to seek permission before using their personal data.

Base: All respondents (Mexico – 1,503)
Most mobile users think companies would keep collecting their information against their wishes.

Mexico

25% were confident companies would stop collecting personal information if they decided to stop sharing.

Base: All respondents (Mexico – 1,503)
Mobile internet users “agree” to privacy statements without reading them… as they are “too long”

**Mexico**

- **51%** would regularly “agree” to a privacy statement on their mobile without reading it.
- **81%** 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 (Mexico – 1,207)
Base 2: All mobile internet users who “agree” to privacy statements but rarely or never read them (Mexico – 618)
Two in three mobile app users check what info an app wants to access before installing it...

Mexico

64% 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.

Mexico

85%

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

Base: All respondents (Mexico – 1,503)
Mobile app users with privacy concerns are likely to limit their use unless they feel more protected

Mexico

86% of all mobile app users had concerns that apps might collect personal information without their consent

51% would limit their use unless better safeguards are put in place

Base 1: All Audience B mobile app users (Mexico – 613)
Base 2: All Audience B mobile app users with concerns (Mexico – 534)
Seven in ten mobile users are concerned about sharing the “exact location of their mobile”

**Mexico**

- Credit card details: 91%
- Unique mobile number: 74%
- Exact location of your mobile: 72%
- Address book contacts: 65%
- Postal address: 64%
- Mobile number: 60%
- Lists of calls and texts: 60%
- Personal information from social networking profile: 59%
- Photos: 44%
- Demographic information: 44%
- Name: 42%
- Browser history: 37%
- Email address: 36%

Levels of concern about sharing specific information

Base: All respondents (Mexico – 1,503)
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: 54%
- Data protection authority: 42%
- National regulator: 36%
- Police: 35%
- Lawyer: 35%
- App developer: 33%
- App store: 29%
- Handset manufacturer: 13%
- Don’t know: 7%
- Family: 6%
- Other: 3%
Most users of location-based promotions find them valuable…

Mexico

32% of mobile internet users were familiar with location-based promotions

60% of those familiar with location-based promotions thought these services were valuable

Base: All Audience A mobile internet users (Mexico – 629)
...but want to be able to turn them off or on

**Mexico**

32% of mobile internet users were familiar with location-based promotions

75% 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 (Mexico – 629)
Mobile users also want to be asked for their permission before sharing their location with a service or app.

**Mexico**

- **94%** want to be asked permission to share their location with a service or an app\(^1\)
- **74%** of those using location-based services (LBS) regularly are concerned at 3\(^{rd}\) parties having access to their location without permission\(^2\)
- **62%** of users thought that a consistent set of rules should apply to any company that had access to their location\(^3\)

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1. Base: All Audience A users who have ever used LBS (n=634)
2. Base: All Audience A users who use LBS regularly (n=433)
3. Base: All Audience A users (n=752)