

GSMA Research into mobile users' privacy attitudes

Key findings from Colombia



Conducted by *futuresight* in March 2013

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 Colombia (March 2013)

Method

- The research in Colombia was conducted in 2 parts in March 2013:
 - Online quantitative survey (with a total sample of 1,511 mobile users in Colombia, of which 67% were smartphone users)
 - Small scale face to face interviews (n=20 in each country) 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 Colombia, 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 – 76% were users of the mobile Internet and apps, over half of whom were heavy users

Sample overview (Colombia)

Sample overview	Colombia
Total sample	1,511 mobile users
Smartphone users	67 %
Gender	52% Male / 48% Female
Age	A bias towards younger age groups (18-45+ years old)
Operator	Claro (54%); Movistar (27%); Tigo (17%);
Handset manufacturer	Blackberry (23%); Samsung (23%); Nokia (22%); Apple (8%); LG (5%); Motorola (5%); Sony Ericsson (4%)
Payment method	Contract (67%); PAYG (33%)

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

Colombia

81%

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

65%

would continue using mobile internet and the apps they wanted regardless, and

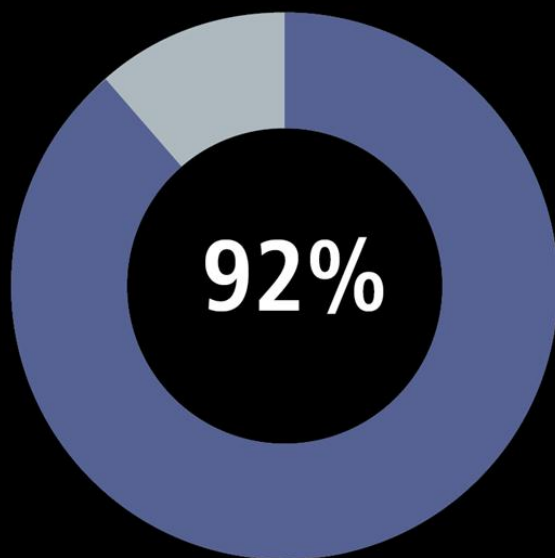
30%

with concerns would use these services more if they felt sure their personal information was better safeguarded

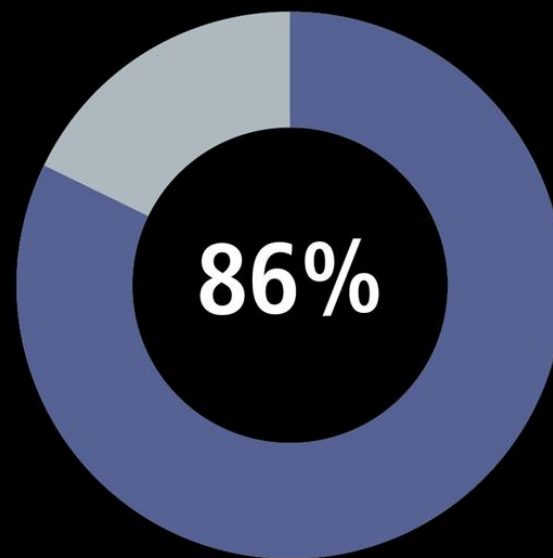
Most mobile users are cautious about who they share their personal information with



Colombia



thought that safeguarding their personal information was very important

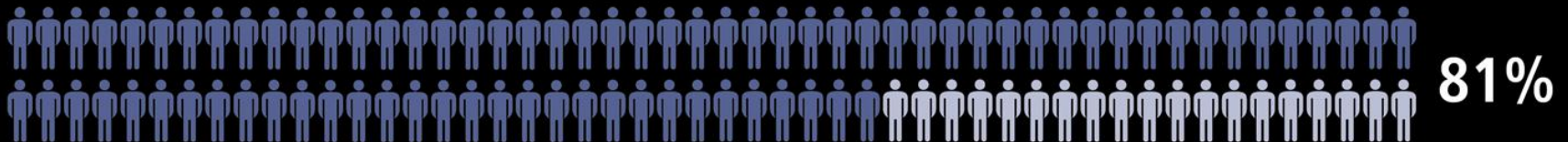


were very selective to whom they give their information

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

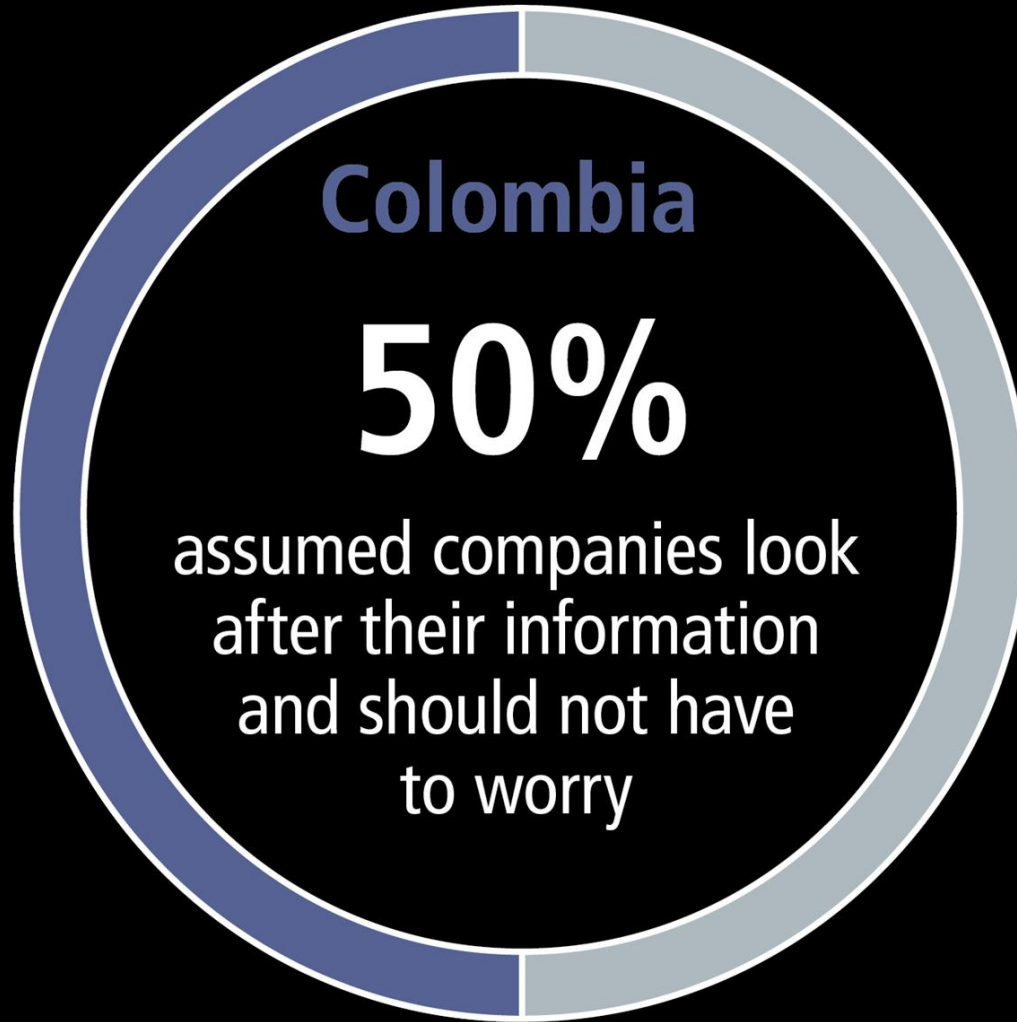


Colombia



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

Half of mobile users assume companies safeguard their information



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

Colombia



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

77%

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



Colombia



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”

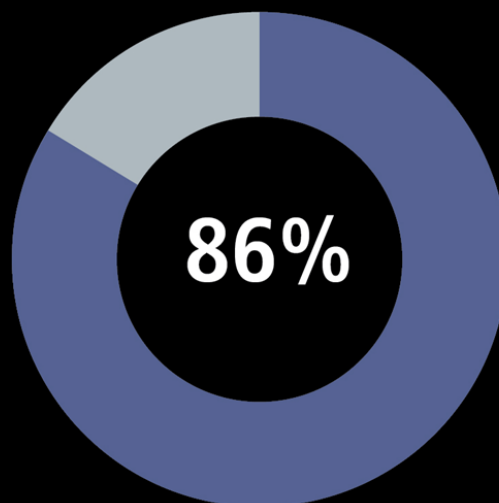


Colombia

53%

I agree

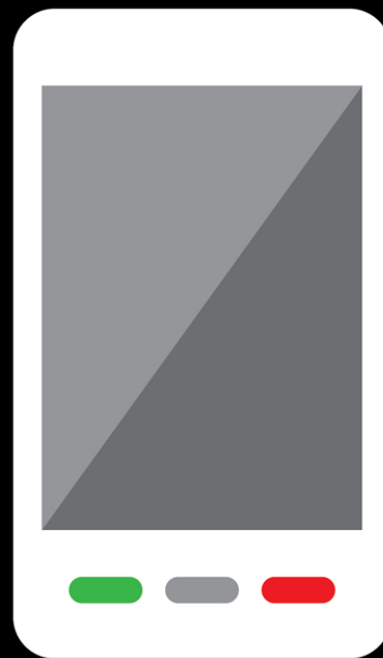
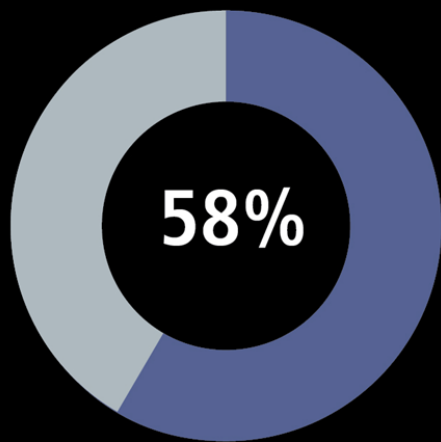
would regularly “agree” to a privacy statement on their mobile without reading it



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...

Colombia



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

Colombia



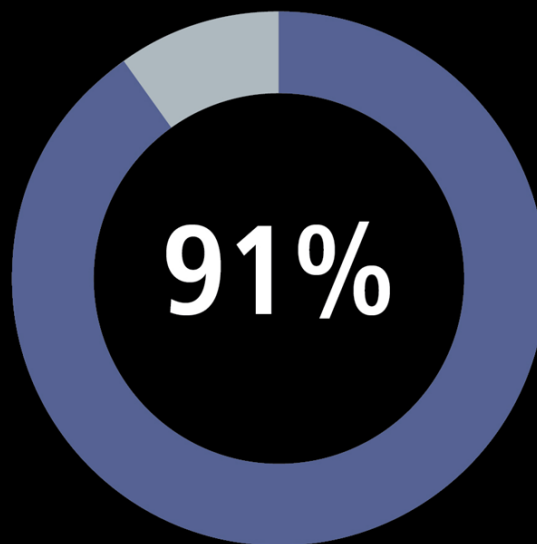
thought it was important to choose whether applications can collect personal information without their consent

91%

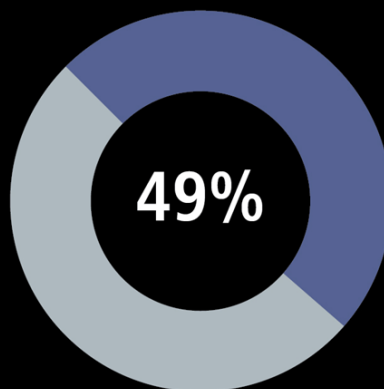
Mobile app users with privacy concerns are likely to limit their use unless they feel more protected



Colombia



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

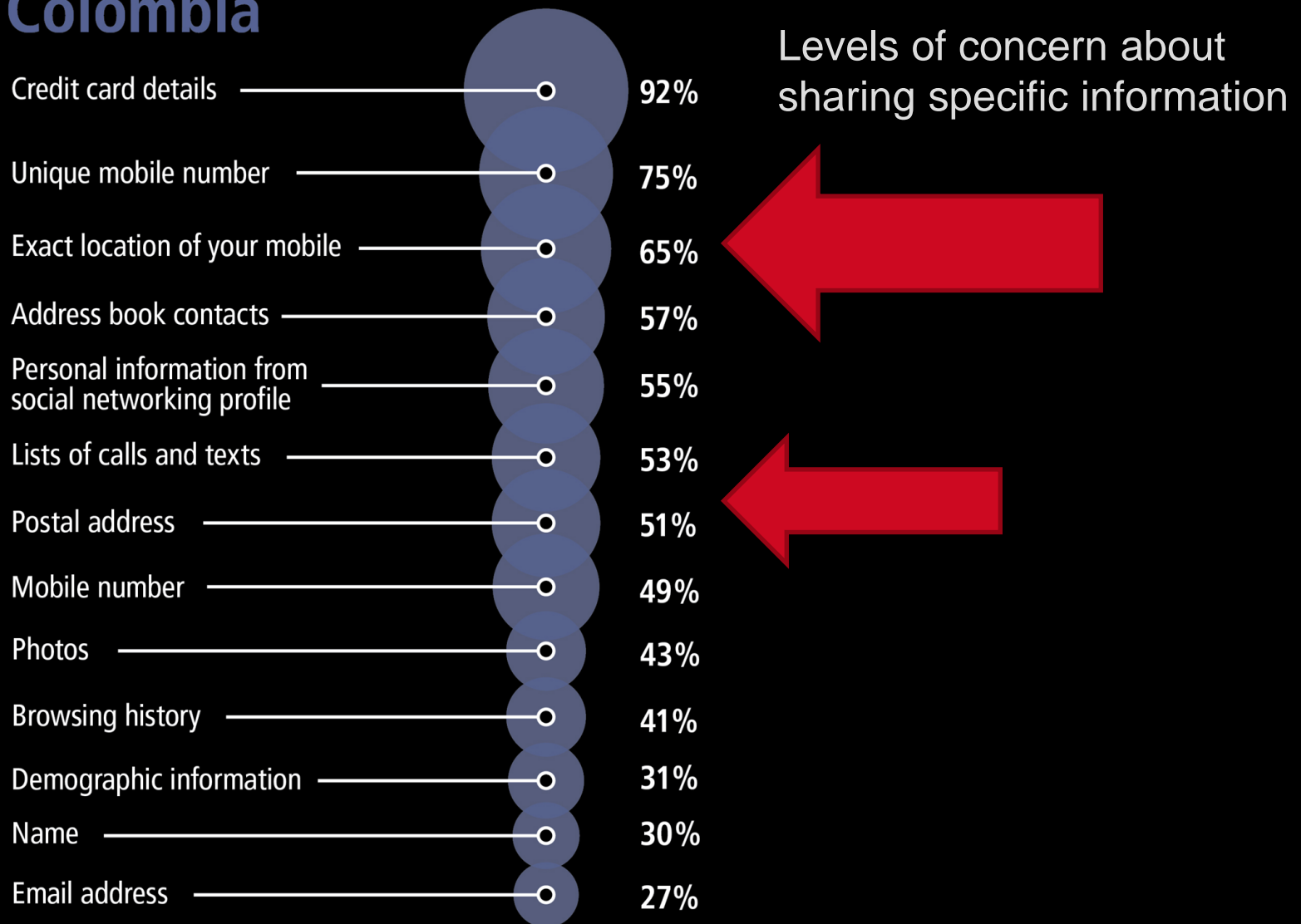


would limit their use unless better safeguards are put in place

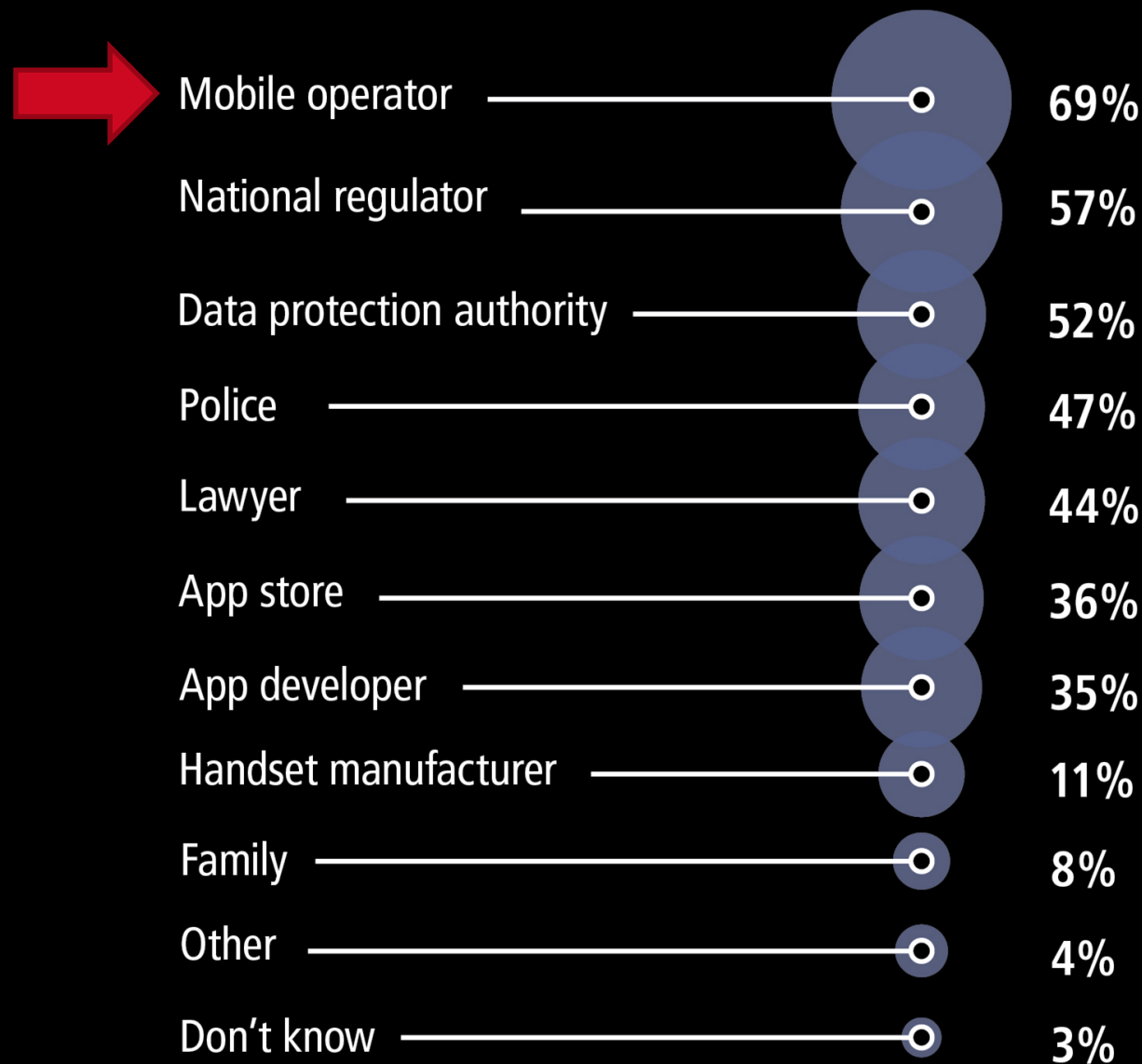
Seven in ten mobile users are concerned about sharing the “exact location of their mobile”



Colombia



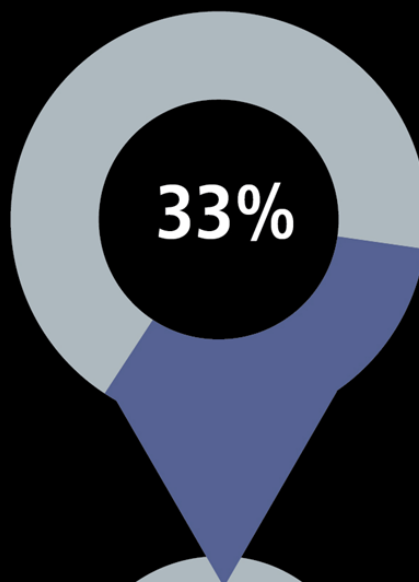
Users would turn to their mobile operators if their privacy was invaded (regardless of who was responsible)



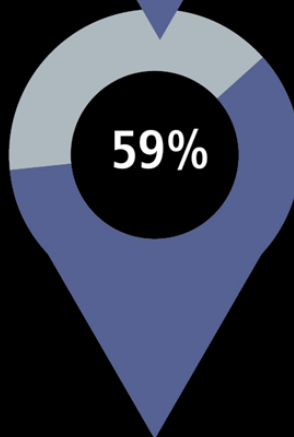
Who people would turn to if they suffered a serious invasion of privacy whilst using a mobile app

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

Colombia



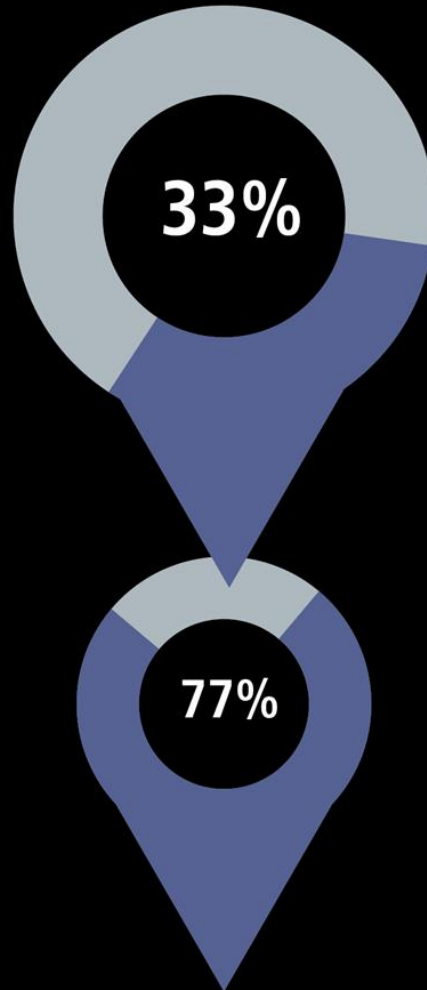
of mobile internet users
were familiar with location
based promotions



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

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

Colombia



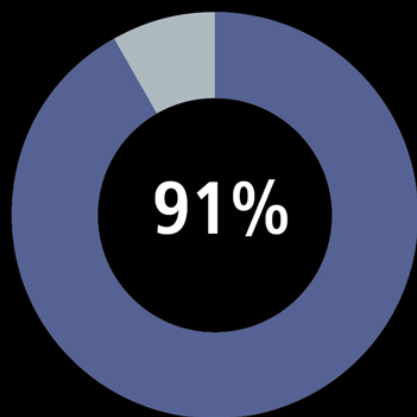
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promotions

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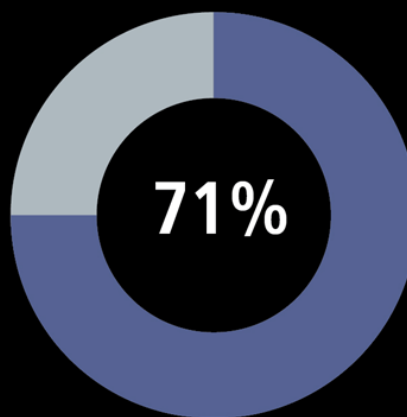
Mobile users want to be asked for their permission before sharing their location with a service or app



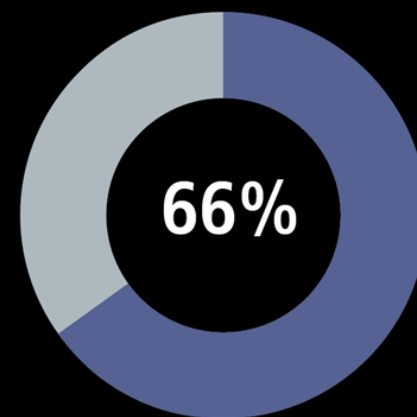
Colombia



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



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



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