

GSMA Research into mobile users' privacy attitudes

Key findings from Mexico



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 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

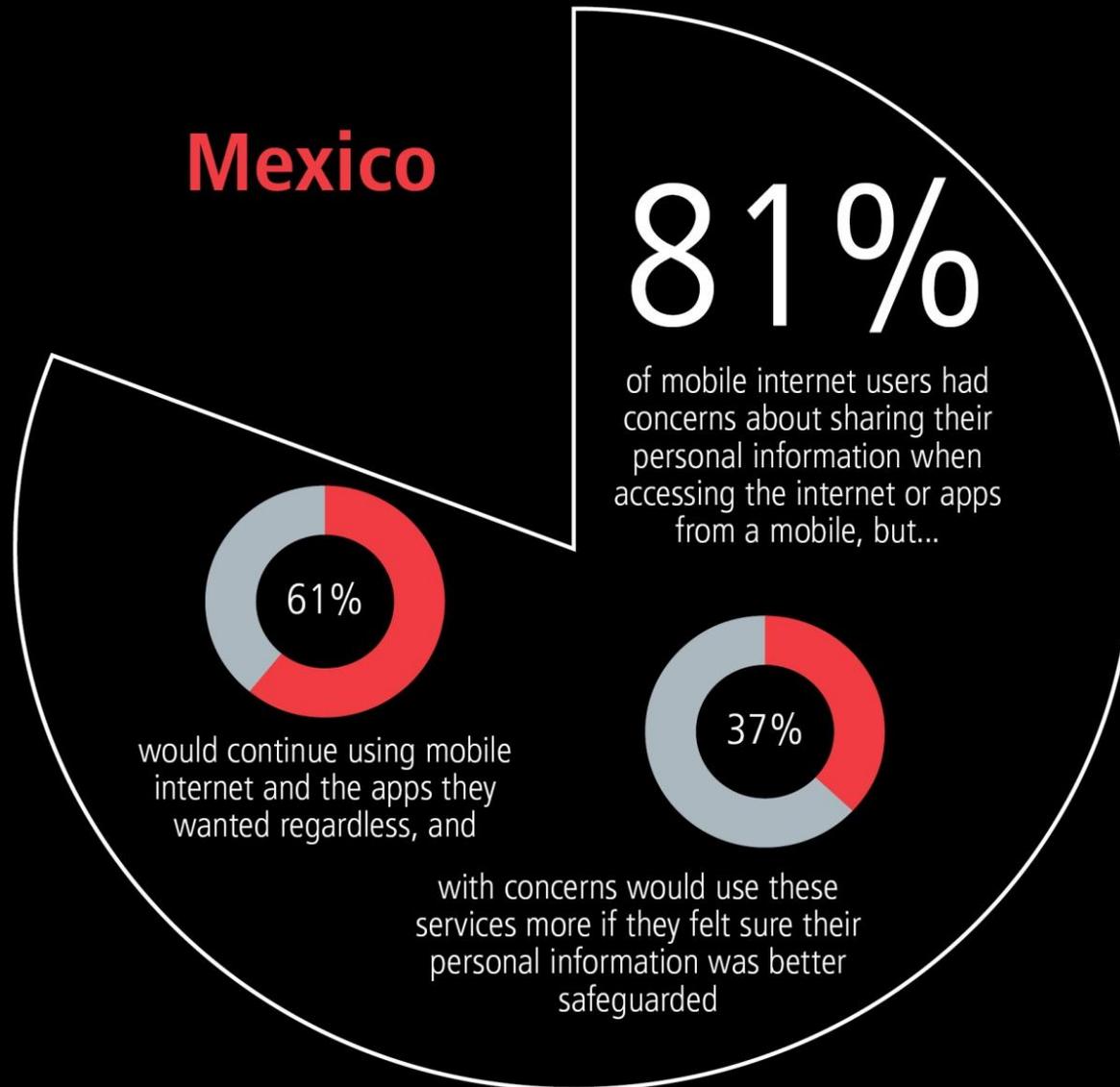
- The sample was broadly representative in terms of demographics (age, gender, social grade and region), albeit older age groups were slightly under-represented, as is common with online panels
- Similarly, the sample was also representative of the supply side in Mexico, i.e. handset manufacturer brands, 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)



Sample overview	Mexico
Total sample	1,503 mobile users
Smartphone users	76 %
Gender	60% Male / 40% Female
Age	A bias towards younger age groups (83% 18-44 years old)
Operator	Claro/Telcel (78%); Movistar (10%); Iusacell (7%)
Handset manufacturer	Nokia (24%); Samsung (18%); Blackberry (14%); LG (11%); Apple (10%); Sony (8%)
Payment method	Contract (44%); PAYG (56%)

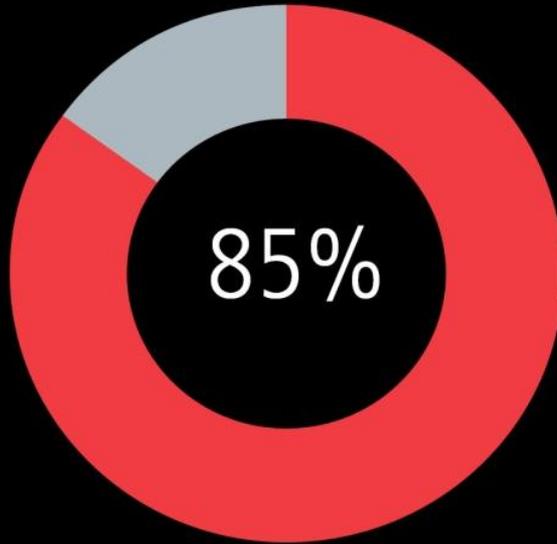
Mobile internet users have privacy concerns and want to know their personal information is safe



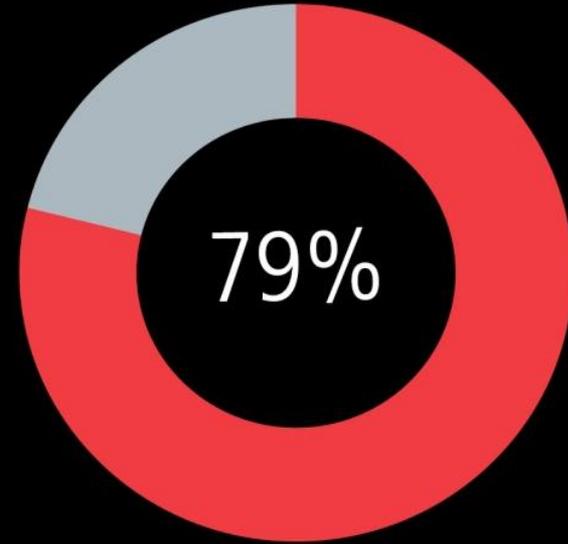
Most mobile internet users are cautious about who they share their personal information with



Mexico



thought that safeguarding their personal information was very important

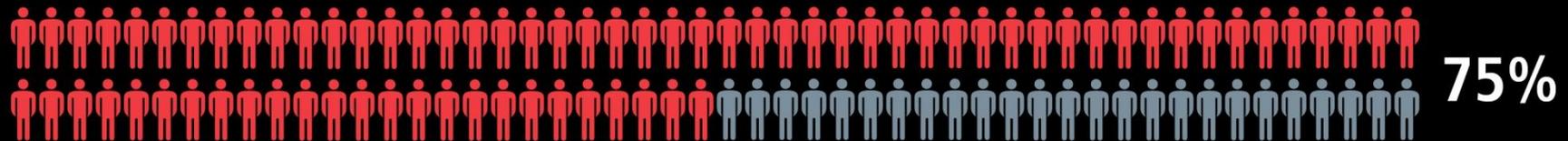


were very selective to whom they give their information

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



Mexico



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

Less than half of mobile users assume companies safeguard their information



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



Mexico



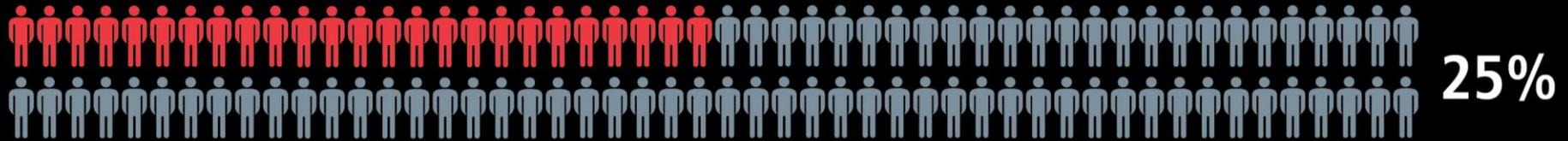
thought it was important for 3rd parties to seek permission before using their personal data

79%

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



Mexico



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”

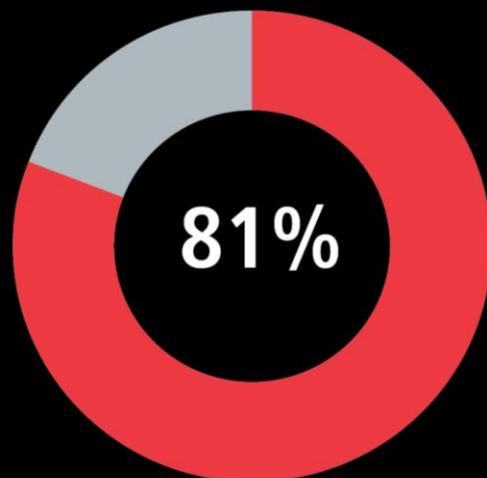


Mexico

51%

I agree

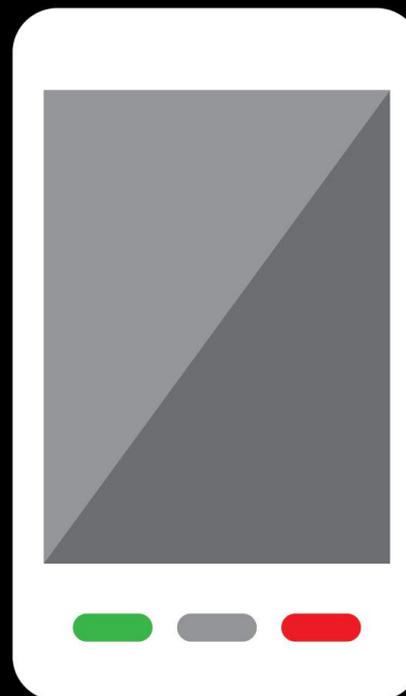
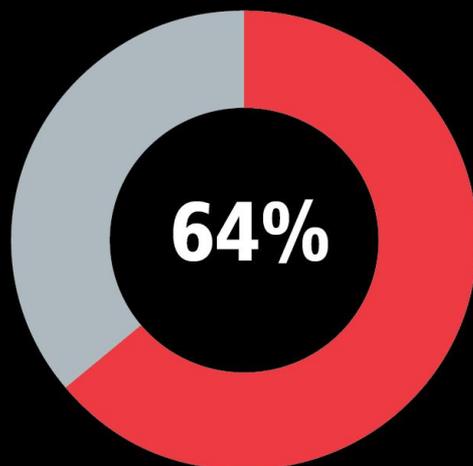
would regularly “agree” to a privacy statement on their mobile without reading it



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...

Mexico



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



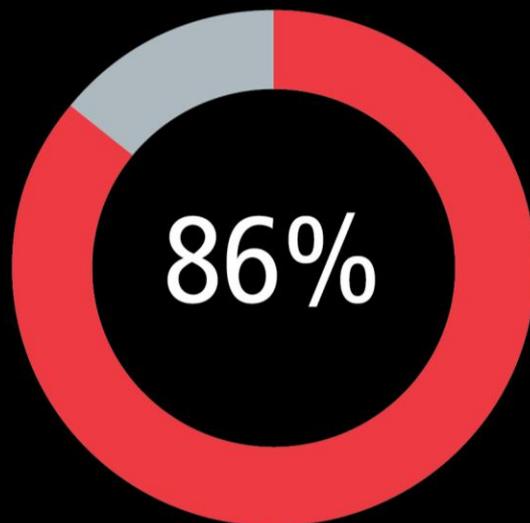
thought it was important to choose whether apps can collect personal information without their consent

85%

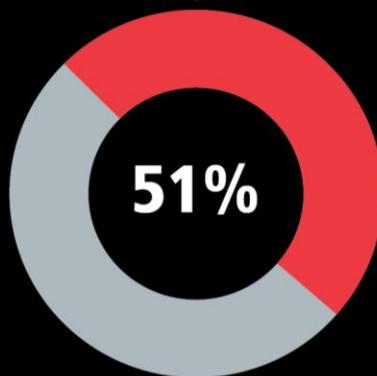
Mobile app users with privacy concerns are likely to limit their use unless they feel more protected



Mexico



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

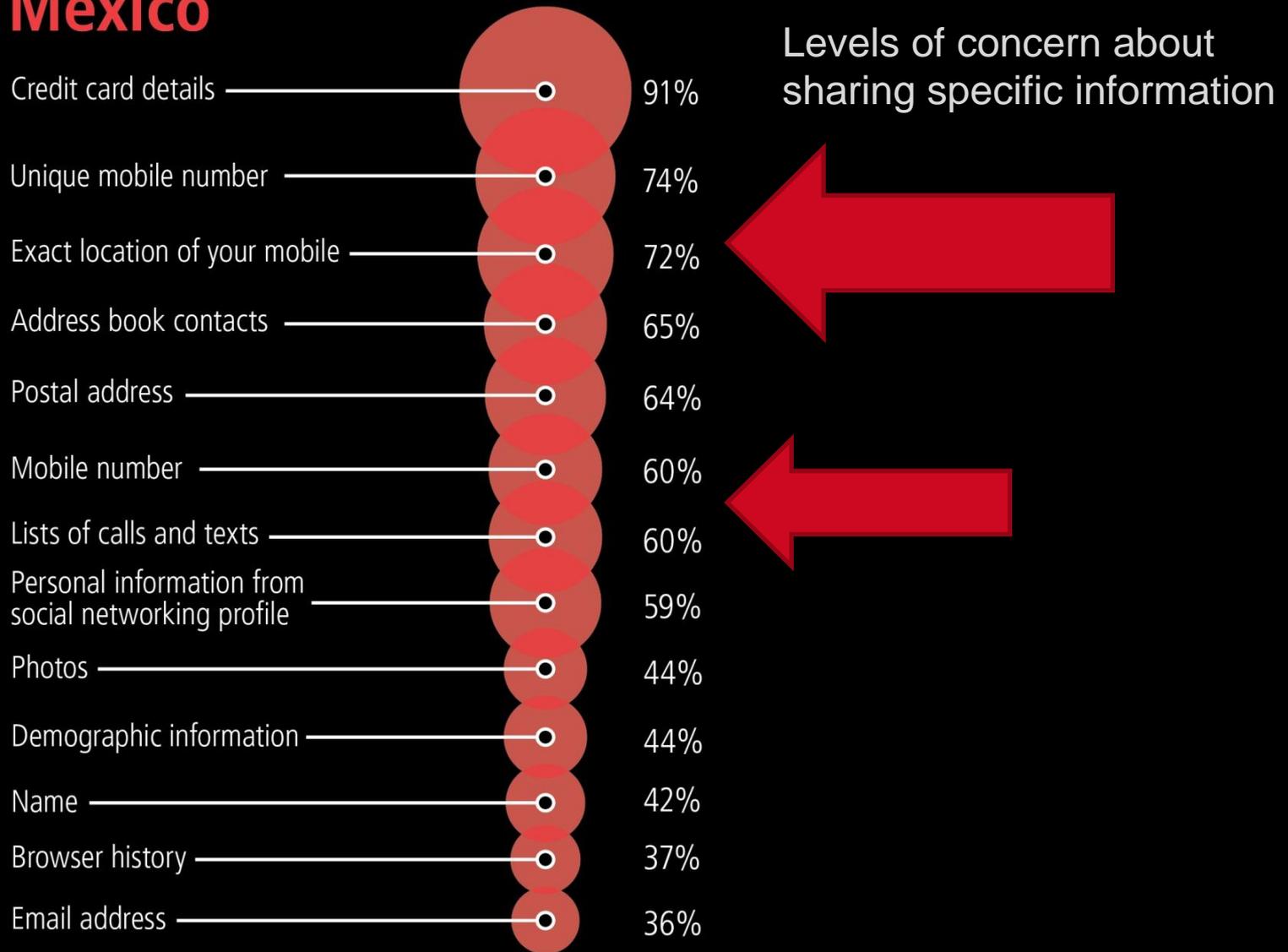


would limit their use unless better safeguards are put in place

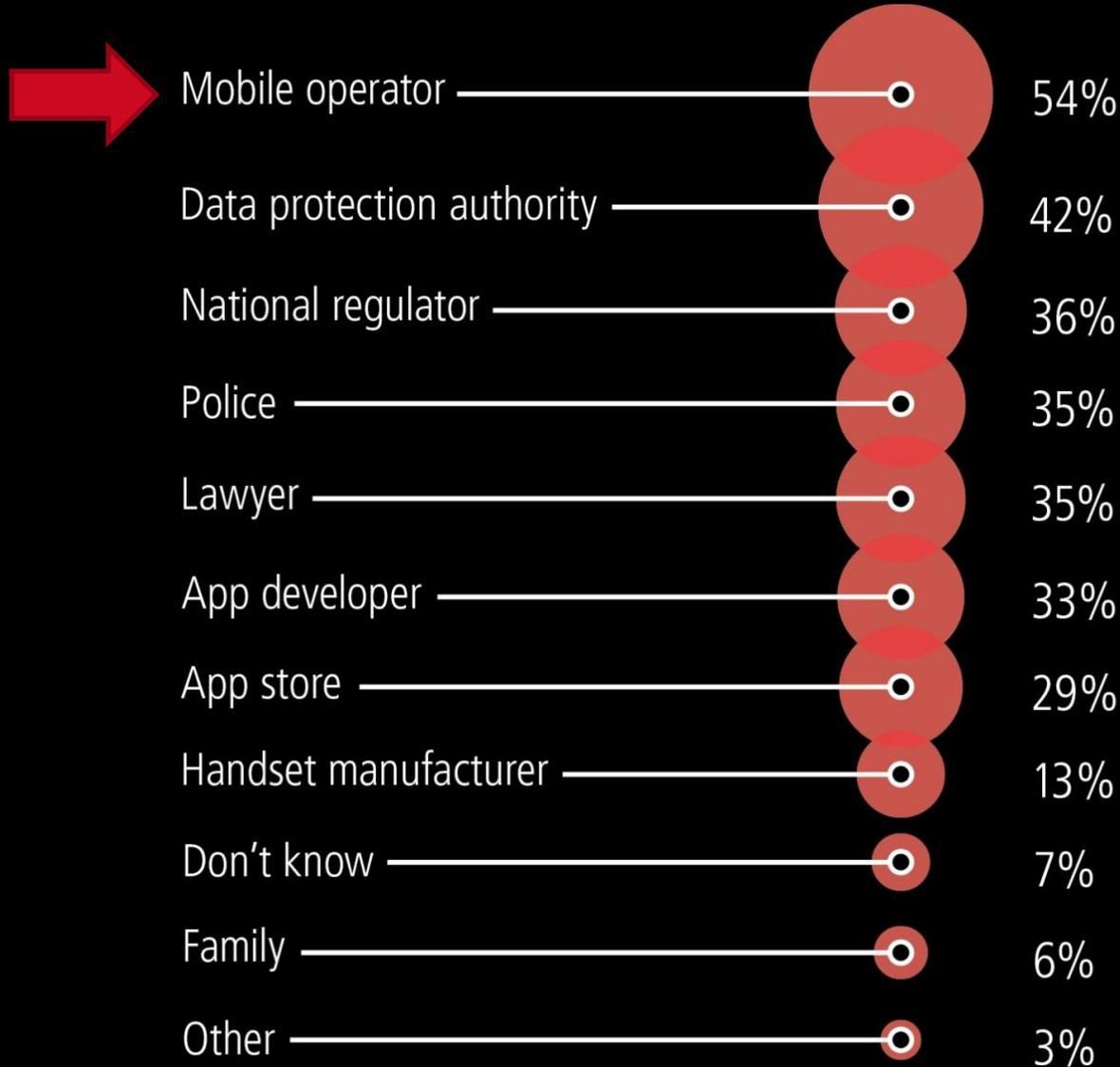
Seven in ten mobile users are concerned about sharing the “exact location of their mobile”



Mexico



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

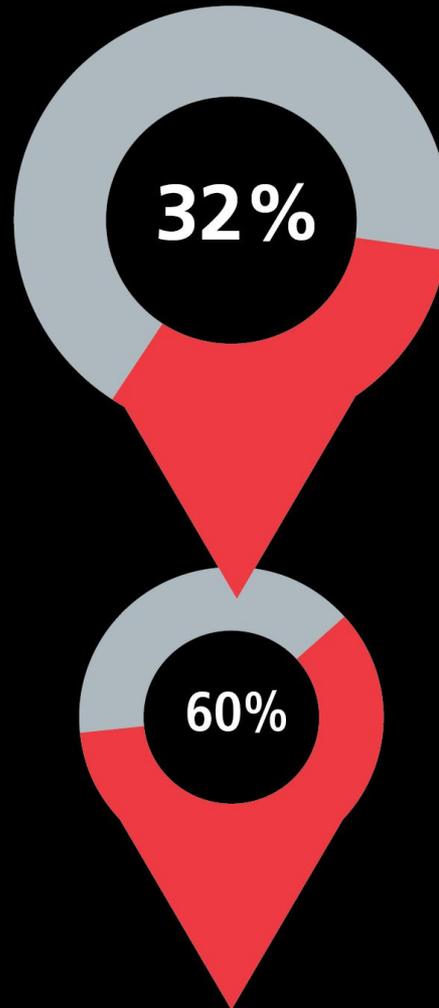


Who people would turn to if they suffered a serious invasion of privacy whilst using a mobile app

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



Mexico

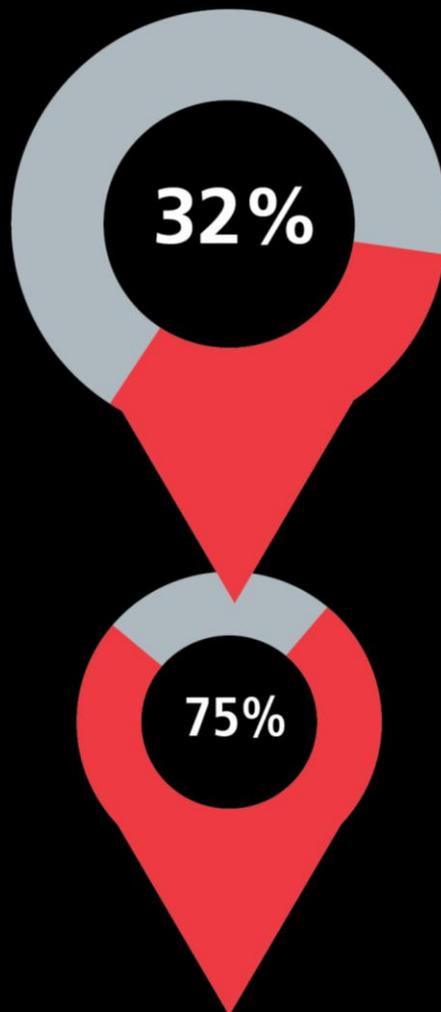


of mobile internet users were familiar with location based promotions

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

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

Mexico



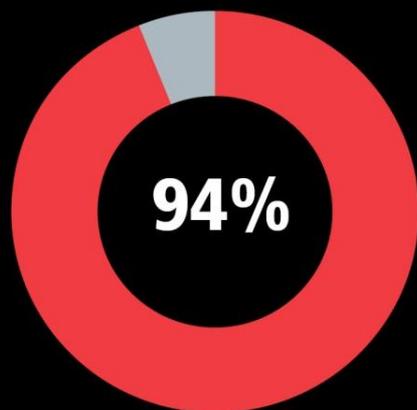
of mobile internet users were familiar with location-based promotions

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

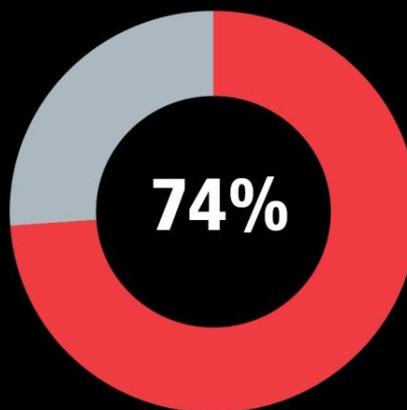
Mobile users also want to be asked for their permission before sharing their location with a service or app



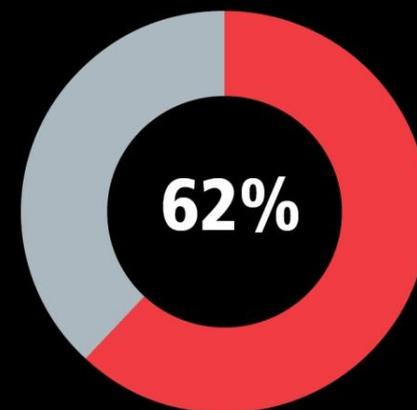
Mexico



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