Research into mobile users’ privacy attitudes

Key findings from Malaysia and Indonesia

Conducted by futuresight July 2013
Mobile internet users have privacy concerns and want to know their personal information is safe

**Malaysia**
- 89% of mobile internet users are concerned about sharing their personal information when accessing the internet or apps from a mobile, but...
  - 62% would continue using mobile internet and the apps they wanted regardless, and...
  - 36% with concerns would use these services more if they felt sure their personal information was better safeguarded

**Indonesia**
- 79% of mobile internet users are concerned 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...
  - 34% with concerns would use these services more if they felt sure their personal information was better safeguarded

Base 1: All mobile internet users - Malaysia = 1,350; Indonesia = 1,402
Base 2 & 3: All mobile internet/app users with concerns - Malaysia = 1,203; Indonesia = 1,112
Mobile internet users with app-related privacy concerns are likely to use apps more if they felt sure their information was safe.

**Malaysia**
- 86% of all mobile internet users are concerned that apps might collect personal information without their consent.
- 54% would limit their use unless better safeguards are put in place.

**Indonesia**
- 80% of all mobile internet users are concerned that apps might collect personal information without their consent.
- 55% would limit their use unless better safeguards are put in place.

Base 1: All Sample B mobile internet users - Malaysia = 692; Indonesia = 701
Base 2: All Sample B mobile internet users with concerns - Malaysia = 593; Indonesia = 561
Most mobile users want apps to ask them before collecting their personal data

86% of mobile app users think it is important to choose whether apps can collect their personal information.

Mobile users are mostly concerned about sharing their credit card details.

### Malaysia
- Credit card details: 90%
- Personal information from social networking profile: 68%
- Exact location of your mobile: 62%
- Mobile number: 62%
- Unique mobile number: 59%
- Postal address: 58%
- Photos: 55%
- Browser history: 49%
- List of calls and texts: 48%
- Address book contacts: 46%
- Demographic information: 41%
- Name: 39%
- Email address: 39%

### Indonesia
- Credit card details: 77%
- Mobile number: 47%
- Personal information from social networking profile: 45%
- Unique mobile number: 42%
- Exact location of your mobile: 41%
- Address book contacts: 40%
- List of calls and texts: 37%
- Browser history: 33%
- Email address: 33%
- Postal address: 29%
- Photos: 29%
- Demographic information: 28%
- Name: 23%

Base: All mobile users - Malaysia = 1,504; Indonesia = 1,527
I do think about my personal information being stolen occasionally. But it doesn’t affect how I use my phone. I just use what I want and don’t think about it that much. I’m more concerned about losing my phone.

Male, 25 years, Malaysia

My mobile is the medium for me to stay connected, to share and communicate with my social network. I don’t need privacy on my mobile because I need to share and be shared, be that photos or what I do and like. So mobile for me is about socialising, sharing, communicating, feeling narcissist, and privacy is not needed.

Female, 22 years, Indonesia

It depends on the information being shared. If it’s about me and my interests, then possibly, if I like the app. But my contact lists, definitely not. It would have to be made very clear what information is being shared and why. Then I don’t have such a problem with the idea.

Female, 37 years, Malaysia

I’m very careful about sharing – I work for a bank and I know how this information can go about. Sometimes you have to share but that’s when you need something like a bank card, or job or new place to live. But most of the time, I will say no. It’s best to be offered the choice and then you can make the right decision.

Female, 33 years, Indonesia

When I download an app or when I’m out and about, I’m careful with making sure the settings are right. Someone I know got kidnapped so now I’m wary of giving out my location and only do it when I want my friends to know.

Male, 32 years, Indonesia

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

Malaysia

62%

Indonesia

73%

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

Base: All mobile app users - Malaysia = 1,337; Indonesia = 1,363
Mobile internet users “agree” to privacy policies without reading them, as they are “too long”

Malaysia
- 79% would regularly “agree” to a privacy statement on their mobile without reading it.
- 79% of those who “agree” to privacy statements without reading them said it is because they are “too long”.

Indonesia
- 74%

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

Malaysia
- 80%

Indonesia
- 67%

Malaysia
- 78%

Indonesia
- 78%

Base 1: All mobile users who have ever registered to use an online site or downloaded an app on their mobile - Malaysia = 1,439; Indonesia = 1,466
Base 2: All who always, often or sometimes agree to user agreement/privacy policy on their mobile without reading it - Malaysia = 1,135; Indonesia = 1,089

Base 1 & 2: All mobile users - Malaysia = 1,504; Indonesia = 1,527
Mobile internet users want choice and control over what ads they receive on their devices and how often

**Malaysia**

69%

**Indonesia**

73%

of mobile internet users want to set their own preferences for the types and timing of ads they receive on their mobile device

The majority of users would willingly share more personal information and accept targeted ads if companies asked for their permission first

**Malaysia**

71%

of mobile internet users would consider receiving targeted location-based advertising from a company that asked for their permission

**Indonesia**

74%

of mobile internet and app users think a privacy icon might encourage them to accept targeted ads

87%

88%

Base 1: All Sample A mobile internet users - Malaysia = 658; Indonesia = 701

Base 2: Base: All mobile internet users - Malaysia = 1,350; Indonesia = 1,402
“I don’t have a problem sharing information if I know I’m going to get something valuable in return. I’ll fill out surveys or whatever because generally I think my information will help me get a better service. But I won’t share anything with a company I don’t know.”

Male, 27 years, Malaysia

“I like the idea of a kite mark or something simple like that. I never read all those long privacy statements, when you want an app you just want to download it and so all you do is click next until you get it. The kite mark could be something like the banking security thing which could be good - a simple way to manage the information I want to share with others and it will help me to choose the apps more easily.”

Male, 29 years, Indonesia

“I sometimes read a privacy policy but I never finish them – they’re always too long. I like the idea of screen prompts – I certainly don’t want to share any information with companies that I don’t know, particularly advertisers. They’re only in it for the money but at least with a prompt I have the choice and I know what’s going on.”

Male, 31 years, Malaysia

“I think information like phone number, marital status, birthday, email and home address is personal and I won’t share that information unless I have to. I need a very clear reason why I need to share my details – I used to be more carefree but now I’m much more cautious. I think it’s too easy for fraudsters to get your details.”

Female, 32 years, Indonesia

Overall, mobile users want to be asked first before the location of their mobile device is shared with a service or an app:

**Malaysia**

84% want to be asked for their permission to share their location with a service or an app

**Indonesia**

82% want to be asked for their permission to share their location with a service or an app

Base: All Sample A mobile users - Malaysia = 751; Indonesia = 763
The more familiar users are with location-based promotions, the more valuable they consider these to be.

Malaysia
- 38% of mobile internet users are familiar with location-based promotions or advertising.
- 66% of those familiar with these services think they are valuable.

Indonesia
- 39% of mobile internet users are familiar with location-based promotions or advertising.
- 67% of those familiar with these services think they are valuable.

Likewise, regular users of location-based promotions find them valuable, but still want to be able to turn them off or on.

Malaysia
- 77% of those who regularly use location-based services find them valuable.
- 90% of those users would like to be asked for permission before sharing their location with a service or an app.

Indonesia
- 79% of those who regularly use location-based services find them valuable.
- 89% of those users would like to be asked for permission before sharing their location with a service or an app.

Base: All Sample A mobile users using location-based services on mobile regularly - Malaysia = 526; Indonesia = 533.
The majority of mobile users think their mobile operator is responsible for safeguarding their privacy even when the operator has no actual control…

Male, 27 years, Malaysia

I think it’s dangerous people knowing where I am. I can see it’s useful sometime but if I do use it I’ll turn off the GPS immediately afterwards.

Female, 33 years, Malaysia

It’s all about having control – if I give permission to a shop I like to send me offers when I’m out shopping and close to the store, that’s fine. It’s not fine to receive advertising that is unsolicited, from companies I don’t know. It’s not nice to think that someone you don’t know knows where you are – it feels like someone is stalking you.

Female, 27 years, Malaysia

I use these apps all the time – to find ATM or restaurants – they’re great and I have no problem sharing my location and other information to get these free apps.

Male, 24 years, Indonesia

So long as I can switch this on and off, I really like this. I get text promotions and they’re usually rubbish. If I can sign up and get these from shops I want when I’m shopping, this is brilliant.

Female, 26 years, Indonesia

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Female, 26 years, Indonesia

The majority of mobile users think their mobile operator is responsible for safeguarding their privacy even when the operator has no actual control…

55% of all users think their mobile operator is responsible for safeguarding their personal information when they download an app from an independent store.

61% of all users think their mobile operator is responsible for safeguarding their personal information when they download an app from an independent store.

Base: All mobile users - Malaysia = 1,504; Indonesia = 1,527
... and hold their mobile operator accountable if their personal information is used in ways they did not expect or feel they had not agreed to

Who people think should be held accountable when their privacy has been breached

Malaysia
Mobile operator 60%
Myself 54%
App developer 46%
App store 45%
Government 36%
National regulator 28%
Handset manufacturer 25%
Other 10%

Indonesia
Mobile operator 66%
Myself 50%
App developer 47%
App store 46%
Government 30%
National regulator 29%
Handset manufacturer 23%
Other 7%

Base: All mobile users - Malaysia = 1,504; Indonesia = 1,527
Mobile users look to their regulators and mobile operators for help when their privacy is invaded…

Who people would contact if they suffered a serious invasion of privacy while using a mobile app

**Malaysia**

- Data protection authority: 59%
- Police: 51%
- Mobile network operator: 47%
- App developer: 31%
- App store: 24%
- National regulator: 24%
- Lawyer: 22%
- Family: 21%
- Handset manufacturer: 14%
- Other: 6%
- Don’t know: 8%

**Indonesia**

- Mobile network operator: 68%
- Data protection authority: 42%
- National regulator: 39%
- Police: 33%
- Lawyer: 33%
- App developer: 17%
- App store: 16%
- Handset manufacturer: 15%
- Don’t know: 13%
- Family: 5%
- Other: 7%

Base: All mobile users - Malaysia = 1,504; Indonesia = 1,527
...and want the same rules to apply to any company accessing their location, irrespective of how they obtain this information.

**Malaysia**

- 56% of users think that a consistent set of rules should apply to any company that has access to their location, irrespective of how they obtain this information.

**Indonesia**

- 60% of users share the same sentiment.

**One in two mobile users are uneasy about companies holding and using their personal information overseas**

**Malaysia**

- 55% have concerns about companies holding and using their personal information overseas.

**Indonesia**

- 45% have similar concerns.

**Malaysia**

- 40% want companies to ask permission before using their personal information overseas.

**Indonesia**

- 43% have the same sentiment.

*Base: All Sample A mobile users - Malaysia = 751; Indonesia = 763*

*Base: All respondents - Malaysia = 1,504; Indonesia = 1,527*
I think the burden of responsibility should be spread across the account holder, the service provider and the app developer. It’s a hand in hand relationship and all parties have to offer the same level of protection. There’s no point in my having sophisticated passwords if their servers are not protected.

Male, 27 years, Malaysia

I’ve never really thought that anyone apart from my friends would be interested in where I am. Now you mention it, I definitely would like companies to ask for permission – I don’t want a whole load of advertising from companies I’m not interested in.

Female, 29 years, Indonesia

I think that big companies, major brands, do look after your information and you shouldn’t have to worry. If I hand over information to an agency for a job, then I’d expect them to look after my information too. It all depends on what company you’re sharing with – the big companies should behave because they’ve got a lot to lose.

Female, 26 years, Indonesia