

CIGI-IPSOS GLOBAL SURVEY ON **INTERNET SECURITY AND TRUST**

2018 Poll, Release 1:
Concern and Trust

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Methodology

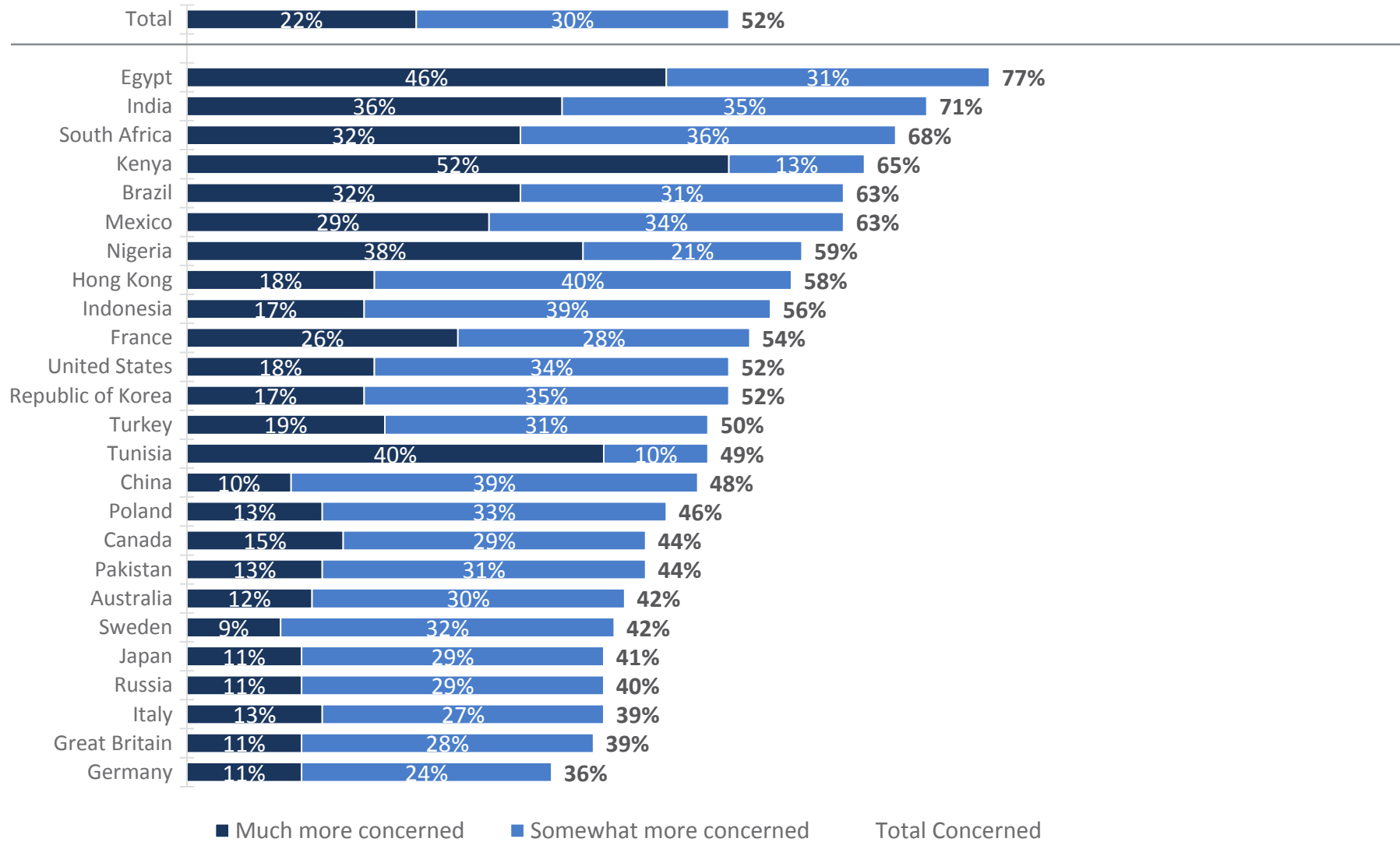
- This survey was conducted by Ipsos on behalf of the Centre for International Governance Innovation (“CIGI”) between December 29, 2017, and March 5, 2018.
- The survey was conducted in 25 economies—Australia, Brazil, Canada, China, Egypt, France, Germany, Great Britain, Hong Kong, India, Indonesia, Italy, Japan, Kenya, Mexico, Nigeria, Pakistan, Poland, Russia, South Africa, Republic of Korea, Sweden, Tunisia, Turkey and the United States—and involved 25,262 Internet users.
- Twenty-one of the economies utilized the Ipsos Internet panel system while Tunisia was conducted via CATI, and Kenya, Nigeria and Pakistan utilized face-to-face interviewing, given online constraints in these economies and the length of the poll. The inclusion of Russia is new to this year’s poll.
- In the US and Canada respondents were aged 18-64, and 16-64 in all other economies.
- For 2018, the economies of Russia and South Africa have been added to the BRICS definition, which previously only included Brazil, India, and China (BIC). For analytic purposes, the BRICS data is tracked against the BIC data from previous surveys, though the comparison is not direct.
- Approximately 1,000+ individuals were surveyed in each economy and are weighted to match the population in each economy surveyed. The precision of Ipsos online polls is calculated using a credibility interval. In this case, a poll of 1,000 is accurate to +/- 3.5 percentage points. For those surveys conducted by CATI and face-to-face, the margin of error is +/-3.1, 19 times out of 20.

BRICS = Brazil, Russia, India, China, South Africa

APAC = Asia Pacific

LATAM = Latin America

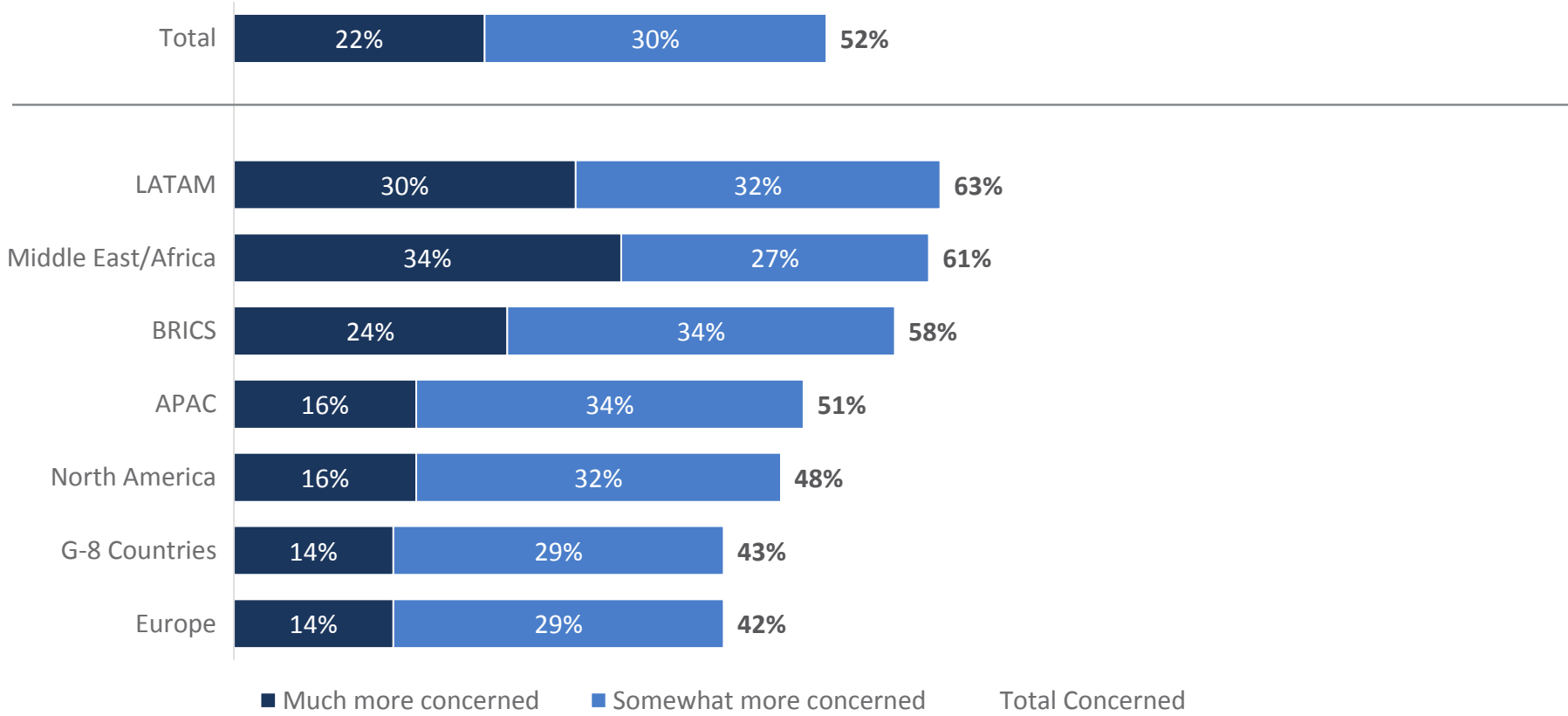
A majority (52%) are more concerned about their online privacy compared to one year ago.



Q1. How concerned are you about your online privacy compared to one year ago?(Select one)

Base: All Respondents Total 2018 (n=24,750)

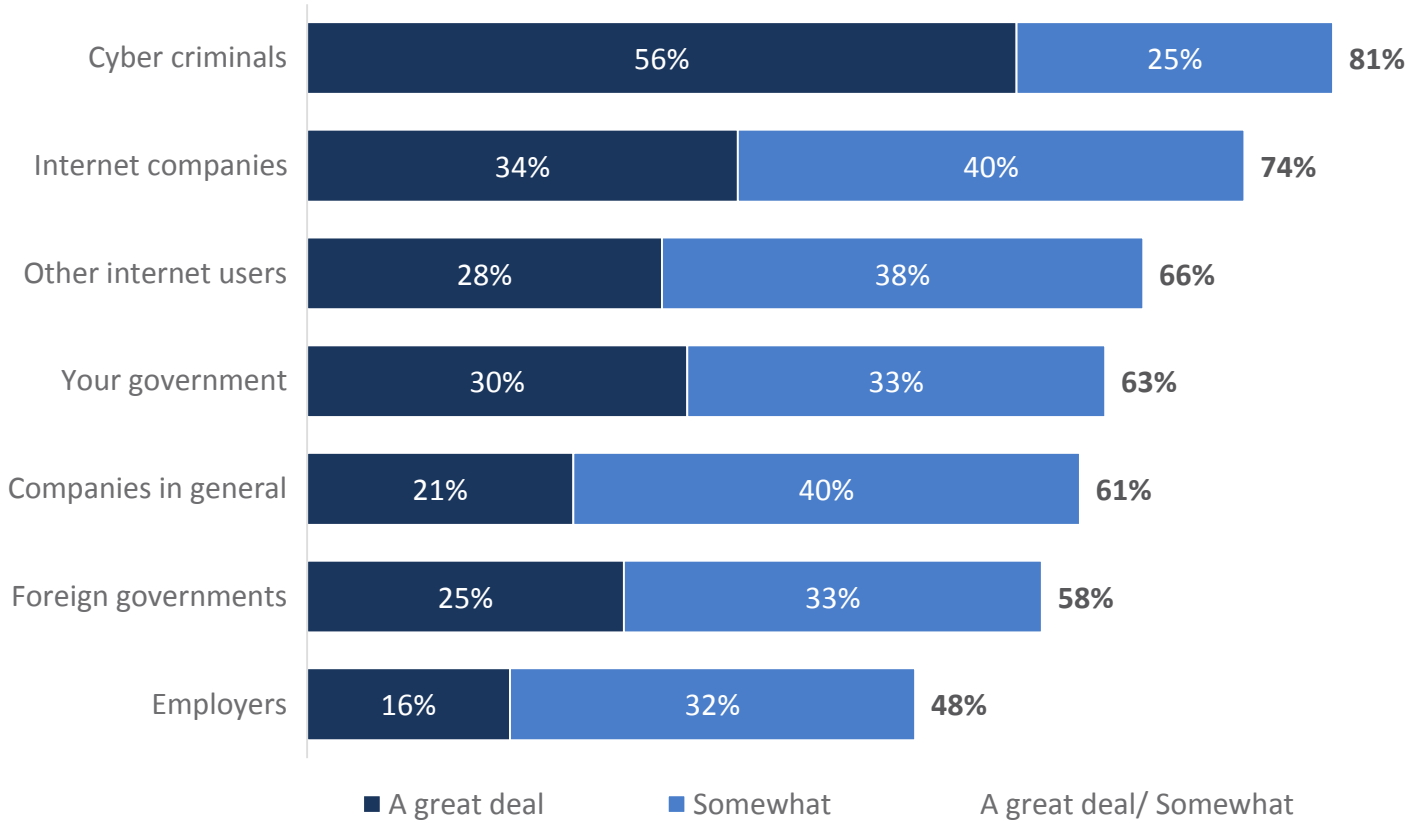
Those in Latin America and the Middle-East and Africa are most likely to say they have growing concern about their online privacy.



Q1. How concerned are you about your online privacy compared to one year ago?(Select one)

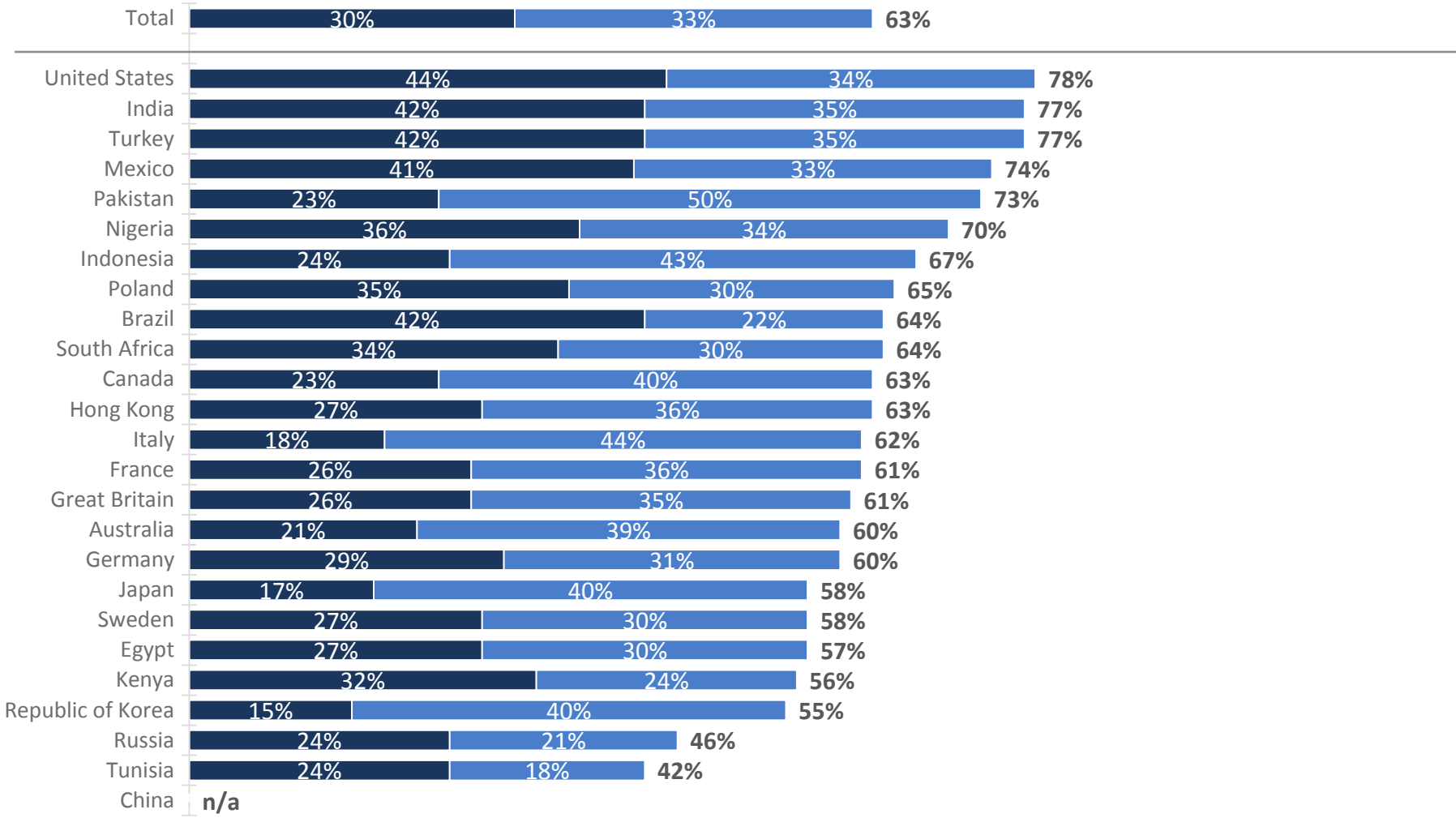
Base: All Respondents Total 2018 (n=24,750)

Among those more concerned, cyber criminals & internet companies are the primary sources of that growing concern.



Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy? Base: Much/ Somewhat More Concerned About Online Privacy 2018 (n=12,956)

Eight in ten (78%) Americans say that their own government has contributed to them being more concerned about their online privacy than a year ago.

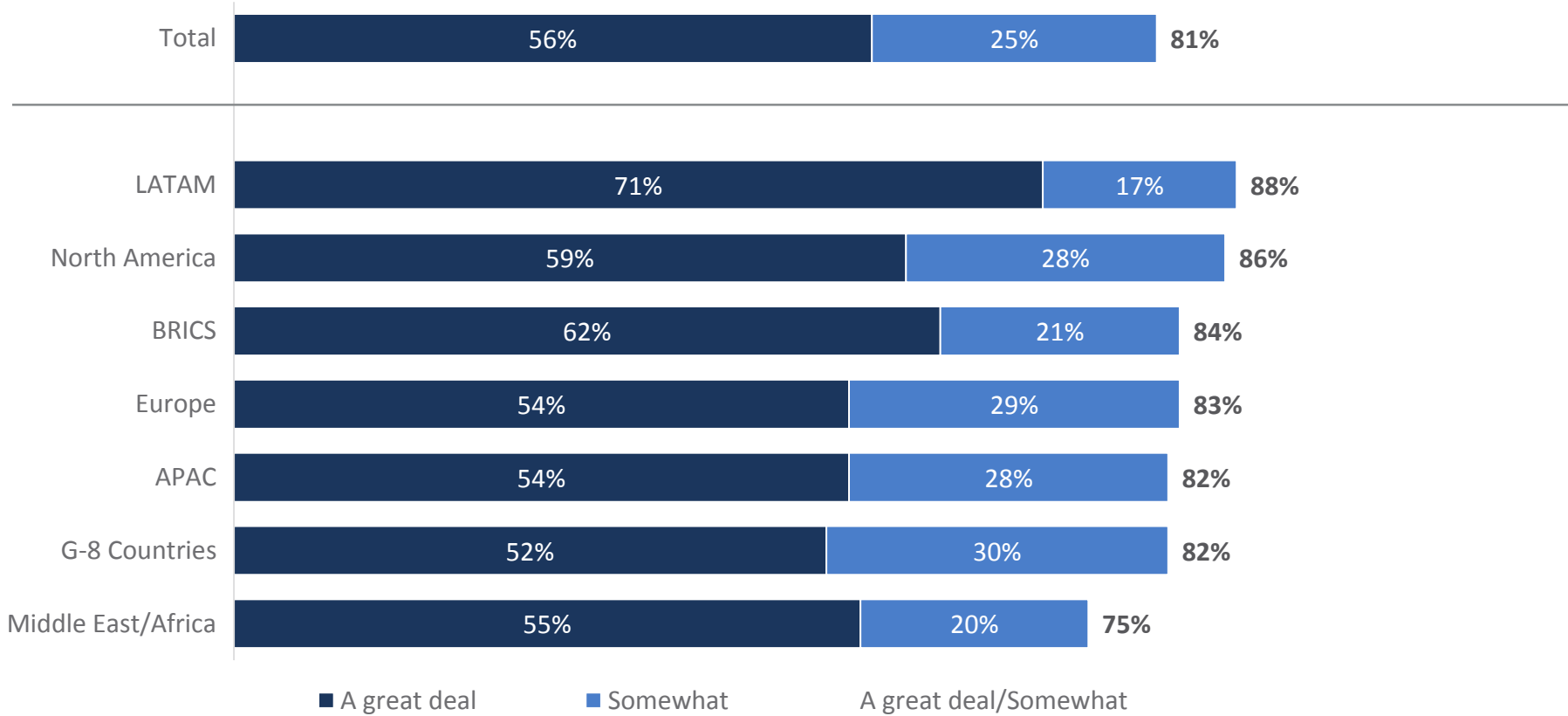


*Not asked in China

■ A great deal ■ Somewhat A great deal/Somewhat

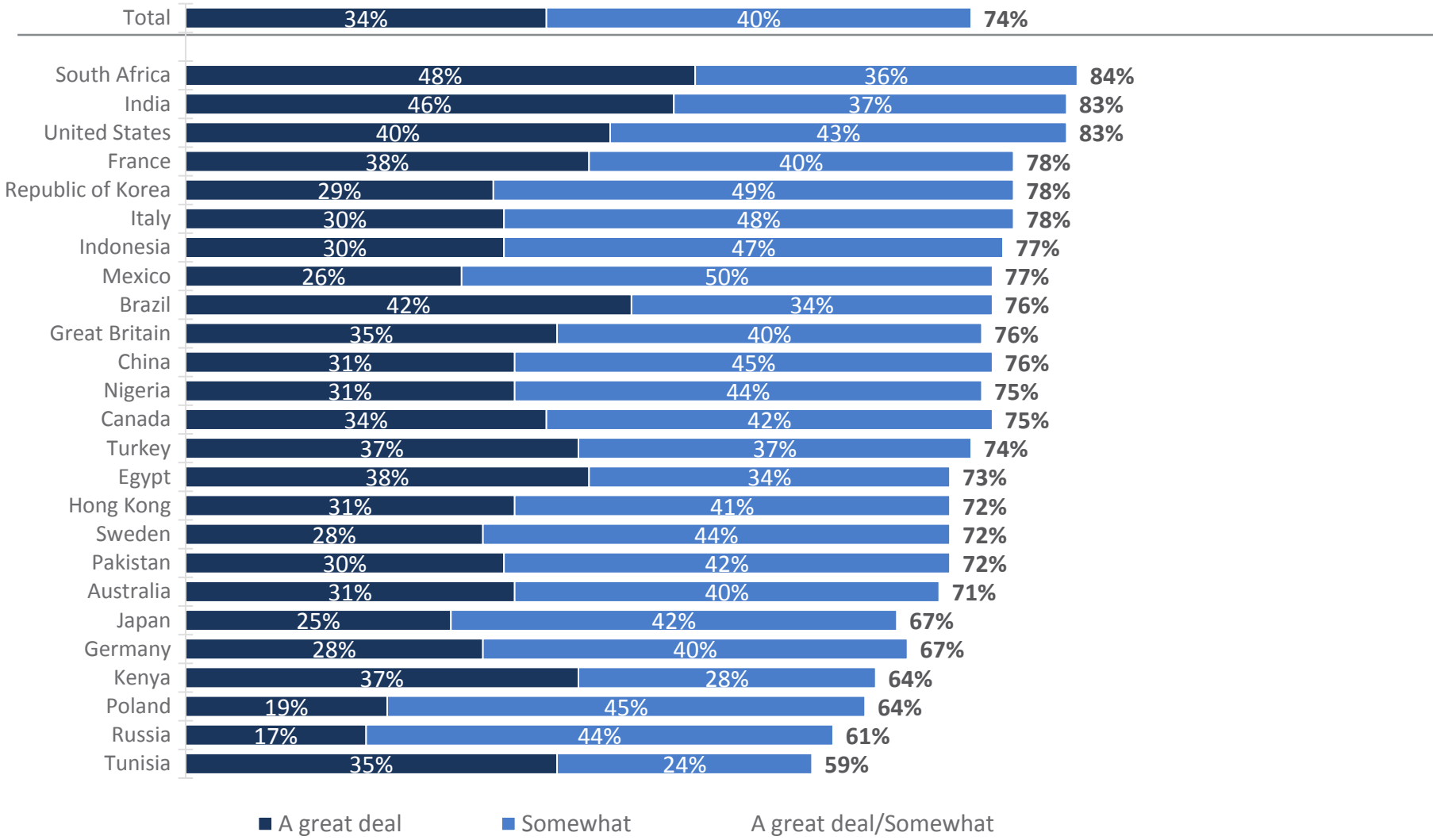
Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy? [Your Government] Base: Much/ Somewhat More Concerned About Online Privacy 2018 (n=12,468)

Concern about cybercriminals is highest in the Americas (LATAM & North America)



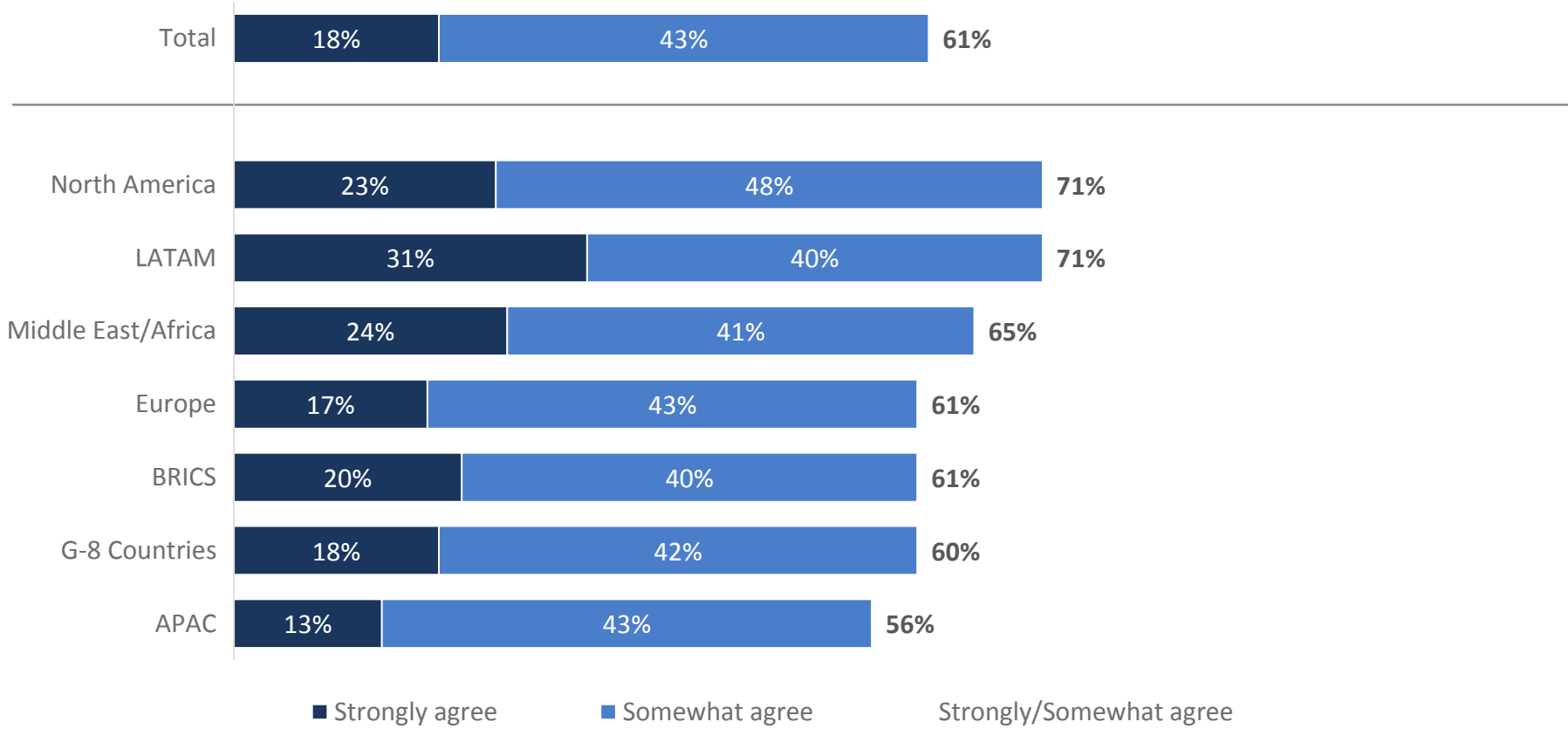
Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy? Base: Much/ Somewhat More Concerned About Online Privacy 2018 (n=12,956)

At well over eight in ten (83%), Americans are among the most likely in the world to be of the view that Internet companies are a source of increasing concern when it comes to online privacy.



Q2. To what extent have the following sources contributed to your being more concerned than last year about your online privacy? [Internet companies] Base: Much/ Somewhat More Concerned About Online Privacy 2016 (n=13,867); 2017 (n=12,956); 2018 (n=12,956)

Among those who are distrustful of the Internet, those in the Americas (LATAM & North America) are among the most likely to agree that their Government contributes to this distrust



Q8. To what extent do you agree or disagree that the following contribute to your distrust in the Internet? [Governments] Base: All Respondents who do not completely trust the internet (n=21,503)

ATTITUDES TOWARDS ONLINE INFLUENCERS

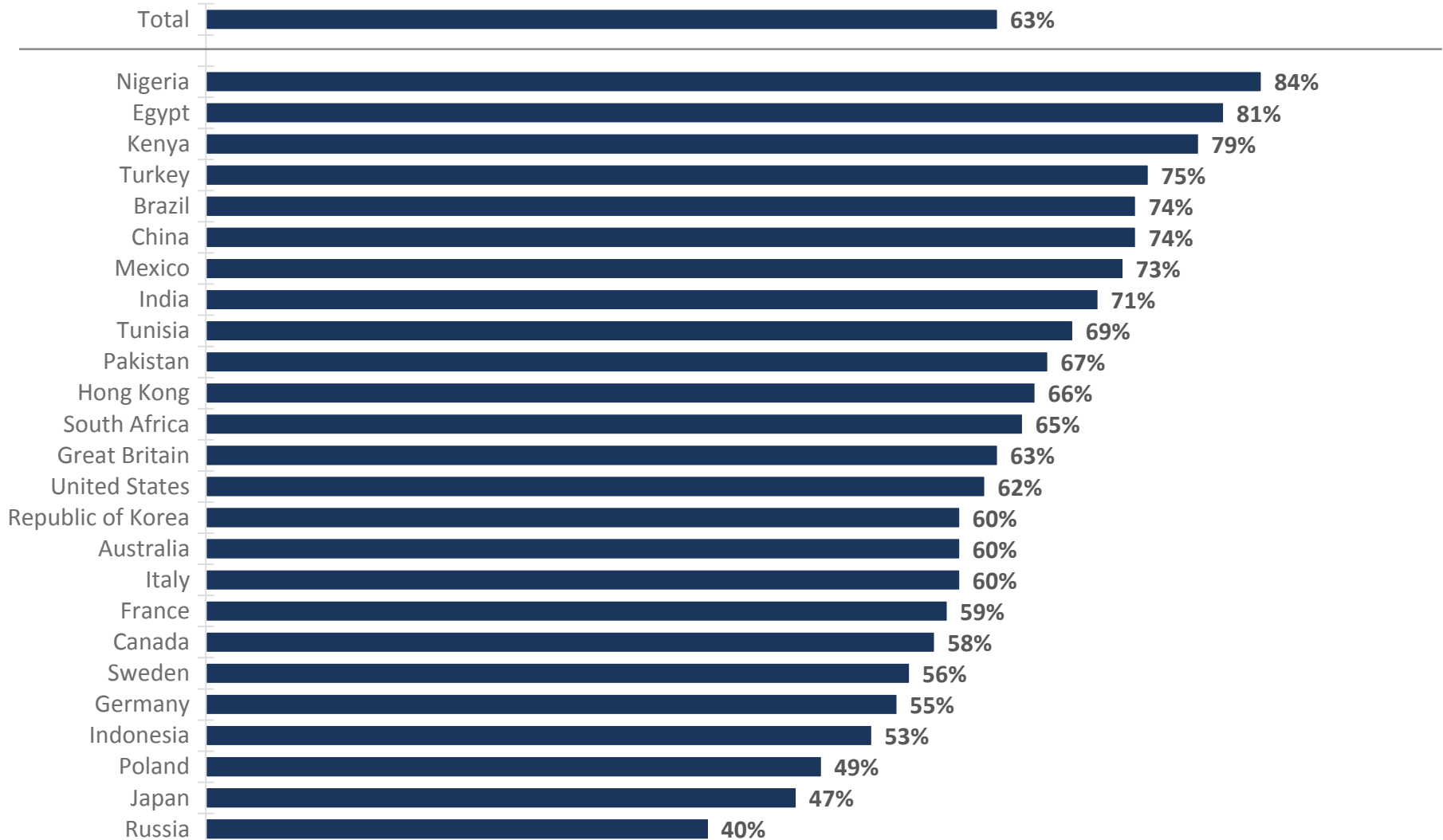
The belief among the majority is that social media and search engines have too much power, even if they do make life easier. Three in ten (30%) say that social media makes their life worse.

	SOCIAL MEDIA	SEARCH ENGINES	ONLINE APPS	ONLINE ADVERTISEMENT
Base: All Answering	22638	22656	22624	22635
They have too much power	63%	57%	48%	49%
They have too little power	30%	28%	28%	29%
They help make my life easier	58%	77%	67%	44%
They make my life harder	29%	22%	23%	30%
They help make my life more efficient	53%	73%	64%	43%
They make my life less efficient	37%	26%	27%	32%
They help make my life better	55%	70%	63%	43%
They make my life worse	30%	22%	23%	31%
They make my life more predictable	44%	48%	45%	37%
They make my life less predictable	34%	31%	30%	29%

Q26, Q27, Q28 and Q29 TOP2BOX (STRONGLY/ SOMEWHAT AGREE)] To what extent do you agree or disagree with the following statements

SOCIAL MEDIA

Six in ten (63%) believe that social media has too much power, led by Nigerians (84%). Six in ten (62%) Americans agree.

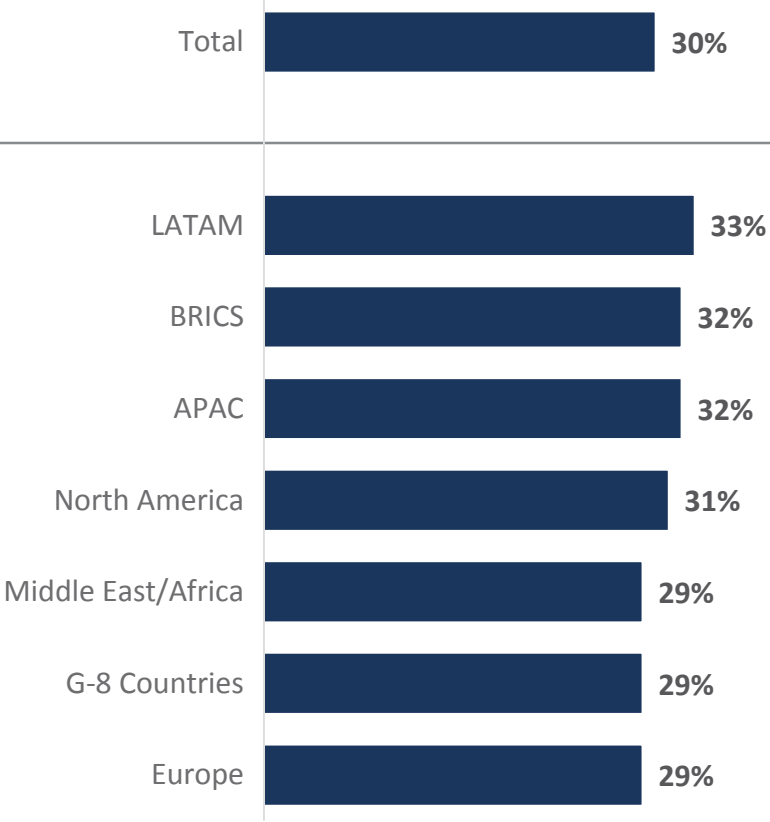


Q26. To what extent do you agree or disagree with the following statements about social media:

Base: All Respondents (n=22,638)

SOCIAL MEDIA

One in three (30%) believe that social media makes their life worse, with opinion relatively flat across the regional economies.



Q26. To what extent do you agree or disagree with the following statements about social media:

Base: All Respondents (n=22,638)

ONLINE INFLUENCERS

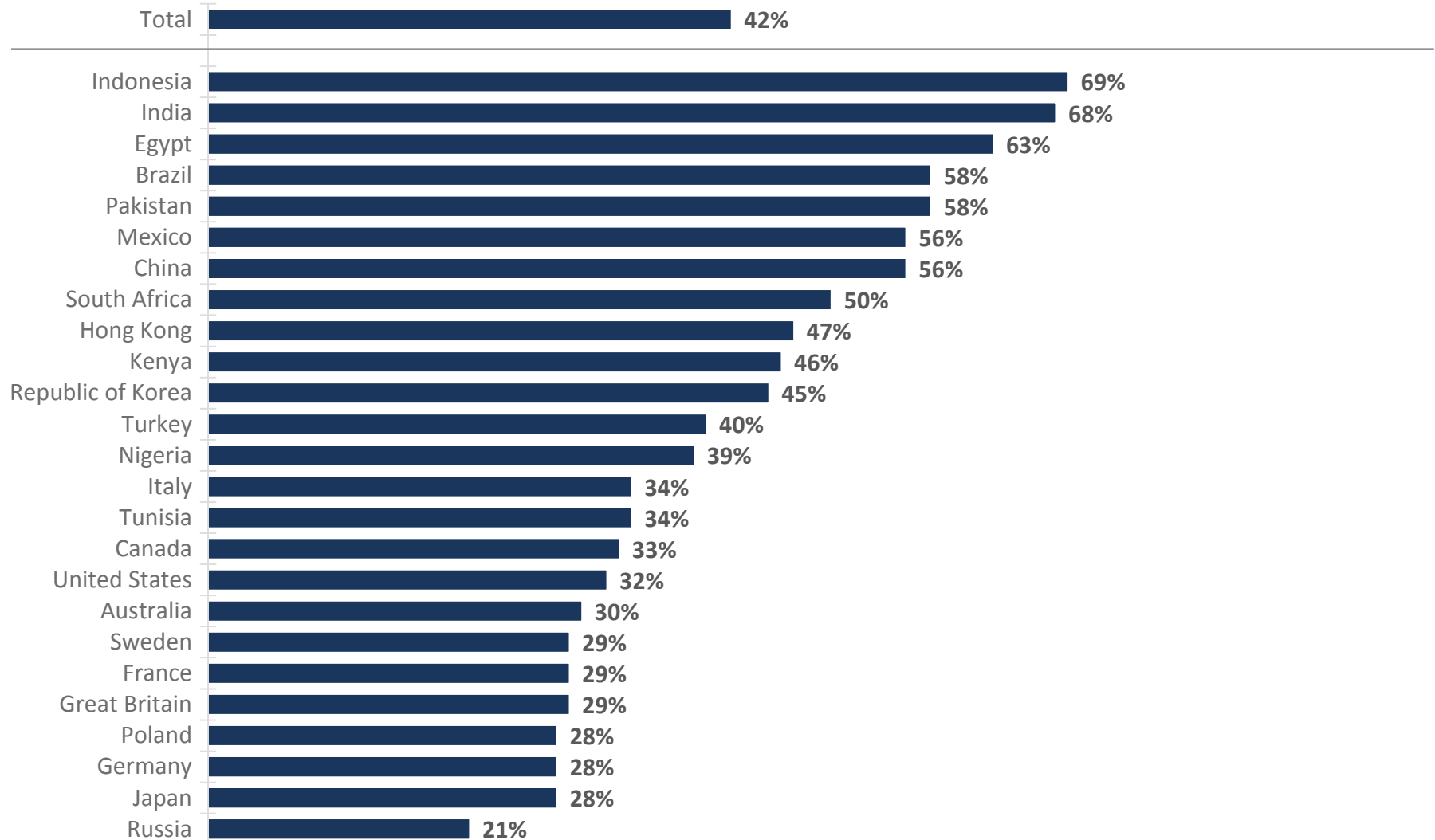
Compared to other platforms, search engines have the greatest impact on what people purchase online and what websites they visit. Social media has the greatest influence over political views.

	SOCIAL MEDIA	SEARCH ENGINES	ONLINE APPS	ONLINE ADVERTISEMENTS
Base: All Answering	22639	22639	22624	22636
Influences what I purchase online	52%	56%	49%	51%
Influences what websites I visit	57%	64%	50%	51%
Influences the media sites that I visit	57%	58%	48%	47%
Influences the news that I see	60%	60%	48%	45%
Influences what applications I use	53%	54%	52%	46%
Influences where I go during my day	41%	43%	39%	38%
Influences my political point of view	42%	39%	35%	32%

Q22/23/24/25 [Summary - TOP2BOX (STRONGLY/ SOMEWHAT AGREE)] To what extent do agree or disagree that xxx influences your online behaviour in the following ways:

SOCIAL MEDIA

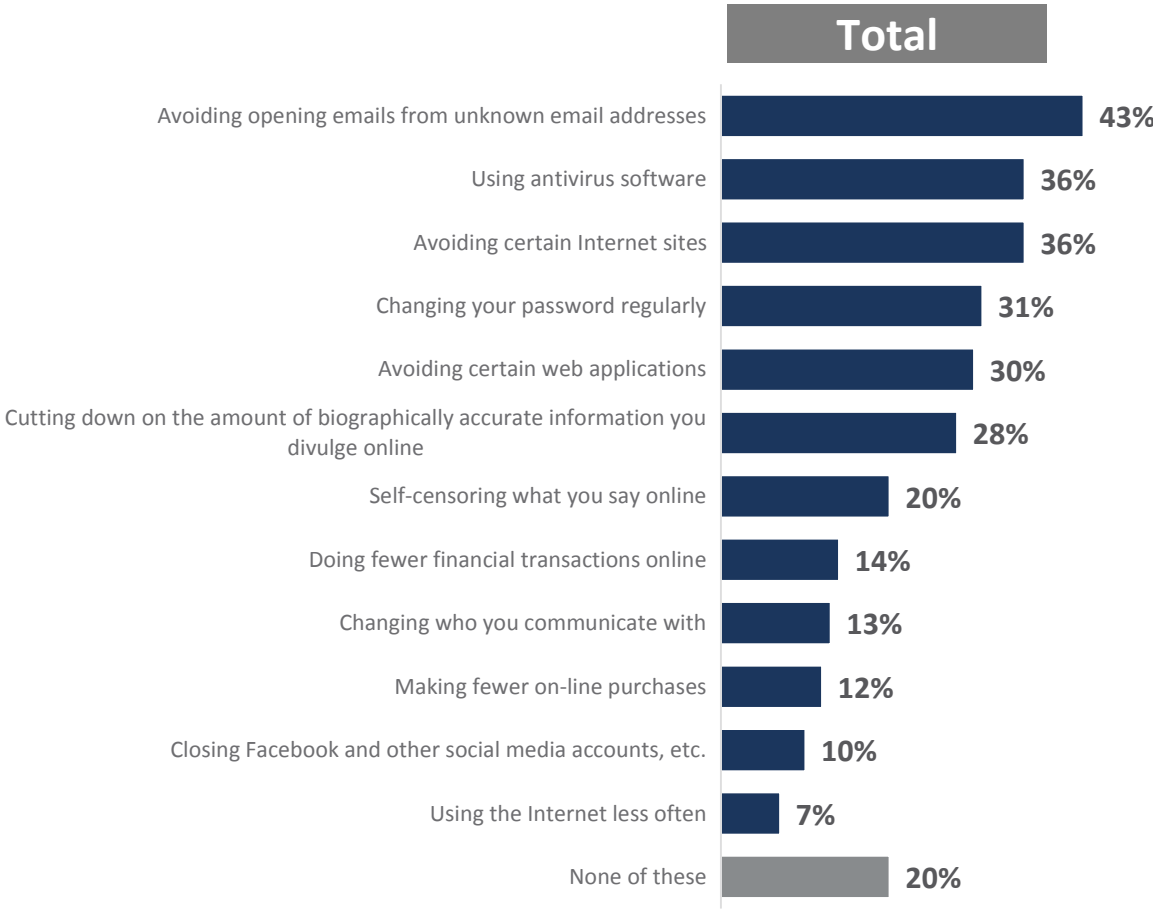
Four in ten (42%) admit that social media influences their political views, led by residents of Indonesia (69%) and India (68%).



Q22. To what extent do agree or disagree that social media influences your online behaviour in the following ways:

Base: All Respondents (n=22,639)

Global citizens are most likely to avoid opening emails from unknown sources, followed by using antivirus software and avoiding certain internet sites.



Q3. How have you changed anything about how you behave online compared to one year ago? (Please select all that apply.)

Base: All Respondents Total 2014 (n=23,376); Total 2016 (n=24,143); Total 2017 (n=24,225); Total 2018 (n=24,750)

Behaviour changes are most pronounced in LATAM, on balance.

	Total	North America	LATAM	Europe	APAC	G-8 Countries	BRICS	Middle East/Africa
	n=24,750	n=2,001	n=2,001	n=6,048	n=8,072	n=8,048	n=4,049	n=5,775
Avoiding opening emails from unknown email addresses	43%	42%	48%	41%	43%	40%	44%	37%
Avoiding certain Internet sites	36%	33%	48%	33%	31%	31%	40%	38%
Using antivirus software	36%	30%	49%	32%	39%	30%	47%	32%
Changing your password regularly	31%	29%	33%	26%	32%	26%	32%	33%
Avoiding certain web applications	30%	24%	37%	25%	27%	23%	34%	31%
Cutting down on the amount of biographically accurate information you divulge online	28%	22%	34%	25%	28%	22%	29%	24%
Self-censoring what you say online	20%	24%	19%	13%	20%	16%	18%	25%
Doing fewer financial transactions online	14%	11%	17%	9%	14%	9%	17%	15%
Changing who you communicate with	13%	12%	13%	8%	11%	8%	13%	15%
Making fewer on-line purchases	12%	11%	13%	9%	11%	9%	13%	13%
Closing Facebook and other social media accounts, etc.	10%	11%	9%	7%	9%	8%	11%	10%
Using the Internet less often	7%	6%	7%	4%	5%	4%	7%	11%
None of these	20%	28%	10%	26%	20%	30%	12%	18%

Base: All Respondents

Q3. How have you changed anything about how you behave online compared to one year ago?
(Please select all that apply.)

Base: All Respondents Total 2018 (n=24,750)

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