



YouGov – Smartphone Security

Inside Technology – Smartphone Security Conference

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YouGov[®]
What the world thinks

Our syndicated studies



Mobile wallet, newly launched tracker surveying 2,500 respondents (2000 Nat rep, as well as specialist sample of users of wave & pay cards and NFC enabled handsets). Reporting on attitudes to mobile wallet, barriers to take up. Who are the most likely consumers to embrace the technology and why?



The Smartphone, Mobile Internet, eXperience (SMIX) – 2000 smartphone owners and 2000 Nat rep, looking at handsets, mobile operators, renewal, churn, operating systems, apps and more.



DongleTrack , a survey of 2000 mobile broadband users every quarter as well as 2000 Nat rep. A multi-client, satisfaction, usage and attitude study.



Tablet Track, an in depth quarterly study into the tablet and e-reader market. Set up to capture existing tablets and their owners as well as new entrants to the market. Over 1300 tablet owners and 2000 Nat rep. Reporting on U&A, satisfaction, take up of 3G devices, operator choice, etc. What will prospects do, who do these devices attract?



iPhone iTrack , 1000 iPhone users every 6 months. Research shows that the Apple brand can over inflate satisfaction, usage and attitudinal behaviour with a particular network operator. iPhone iTrack looks to measure and understand behaviour of iPhone owners to ultimately answer the question... Which network operator is better and why?



Smart TV - A syndicated quarterly tracking service, delivering data and insights on the shifting state of the Smart/Connected TV market. Starting in Q1 2012 covering UK,US, France and Germany. Coverage to be expanded during 2012. 1,000 Smart TV owners and 2,000 Nat Rep.



**The consumer perspective on smartphone...
and tablet security in the UK**

**Data taken from latest waves of:
YouGov SMIX Wave 10 (Mar 12)
YouGov Tablet Track Wave 7 (Feb 12)**



Headlines



Apps sharing information and third parties stealing personal data are smartphone user worries



A third of smartphone owners don't know what apps may access and 6% think apps do not access information



Over half of smartphone users feel their device is secure. Only 15% believe their device isn't.

Slight increases in awareness of smartphone contracting a virus.



Virtually nobody has received a known virus

Android users significantly more likely to have downloaded anti-virus software, and of those that have vast majority have it for free – they trust third party apps they may not have heard of though rather than more traditional anti-virus software



Over half of smartphone owners unaware of what operating systems are sharing information

Over a third never read app access permissions



Most believe that their operator should promote the threat of viruses on their handset



28% of tablet owners aren't concerned about viruses



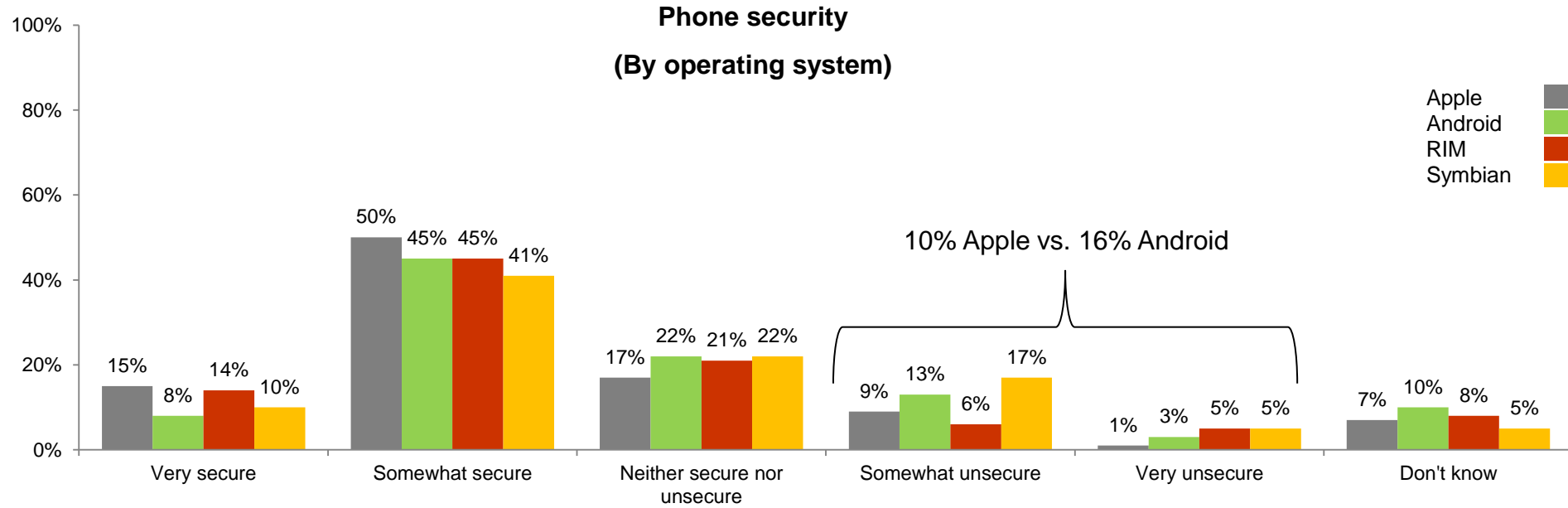
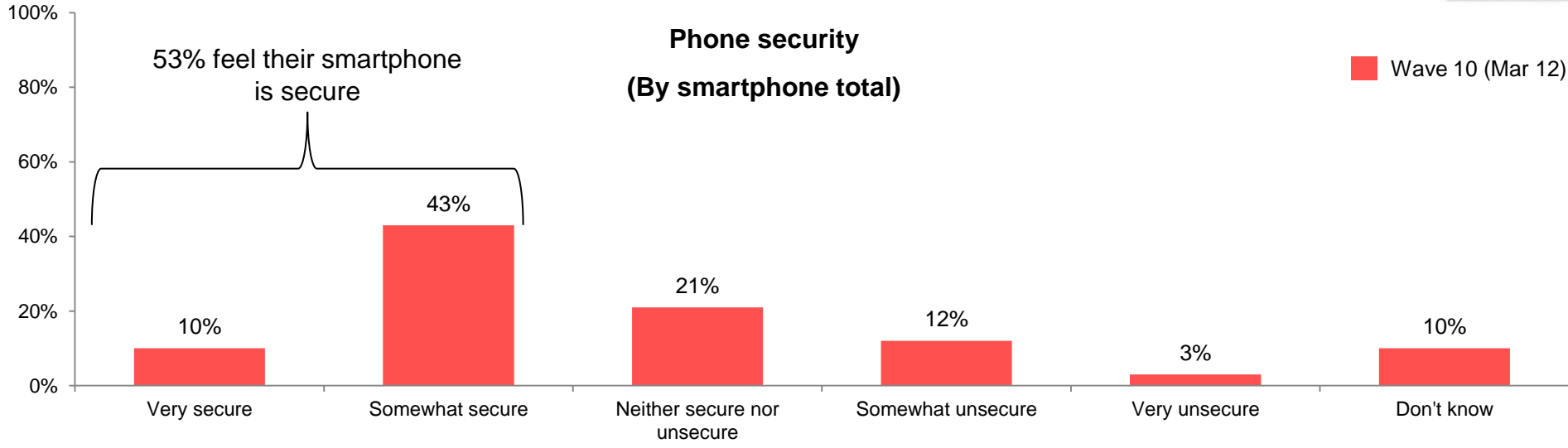
10% of tablet owners have anti virus software on their device and over a third would get anti virus software on their device...as long as it was free

Device ownership shifting towards late majority groups which may see more caution in the future relating to downloading of apps and online behaviour.





Phone security



Base: All qualified respondents that own a smartphone (2077)
 Sec: Thinking about the security on your phone, how secure do you feel it is?

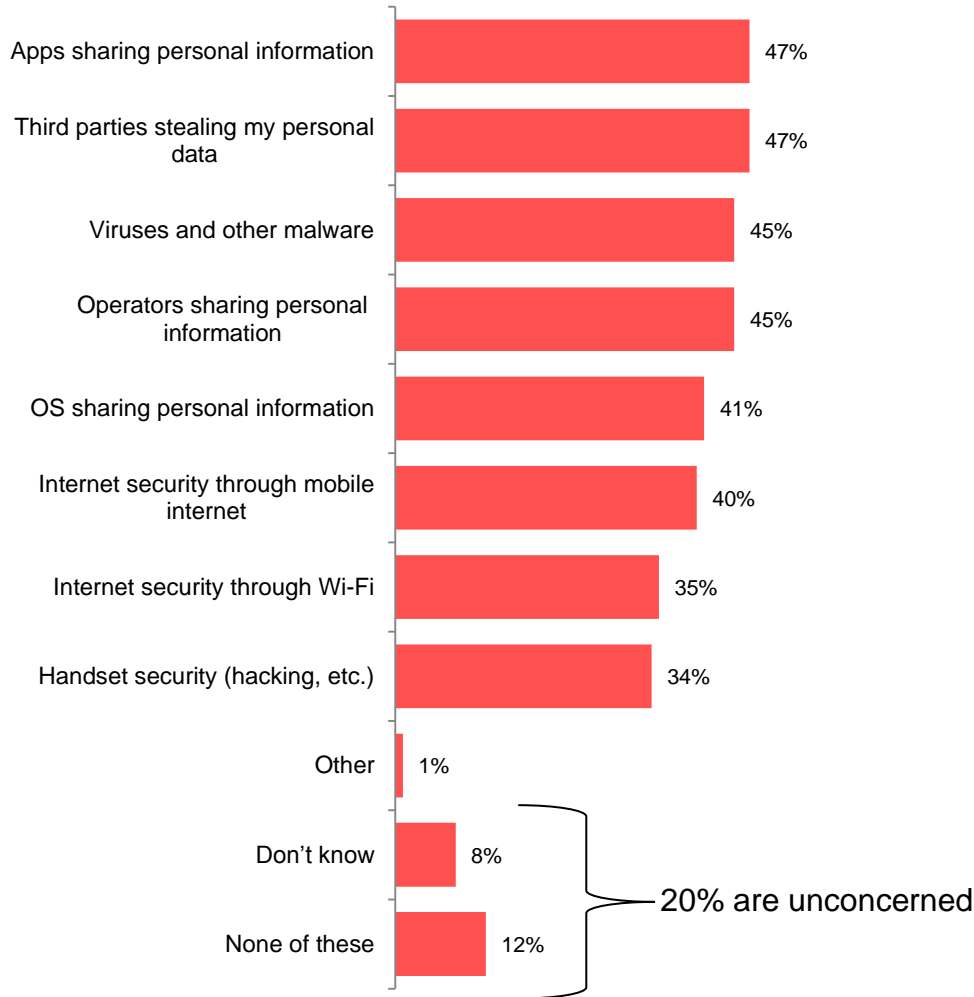




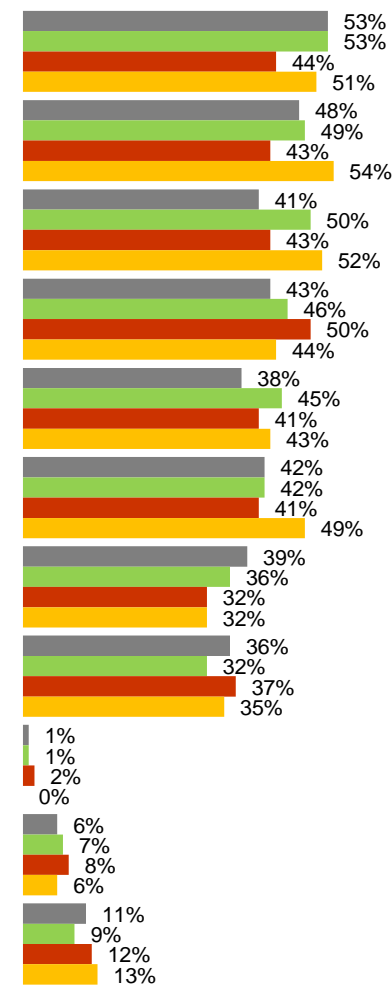
Security worries

Wave 10 (Mar 12)

Security worries (By smartphone total)



Security worries (By operating system)



Apple
Android
RIM
Symbian

Base: All qualified respondents that have a smartphone (2077)

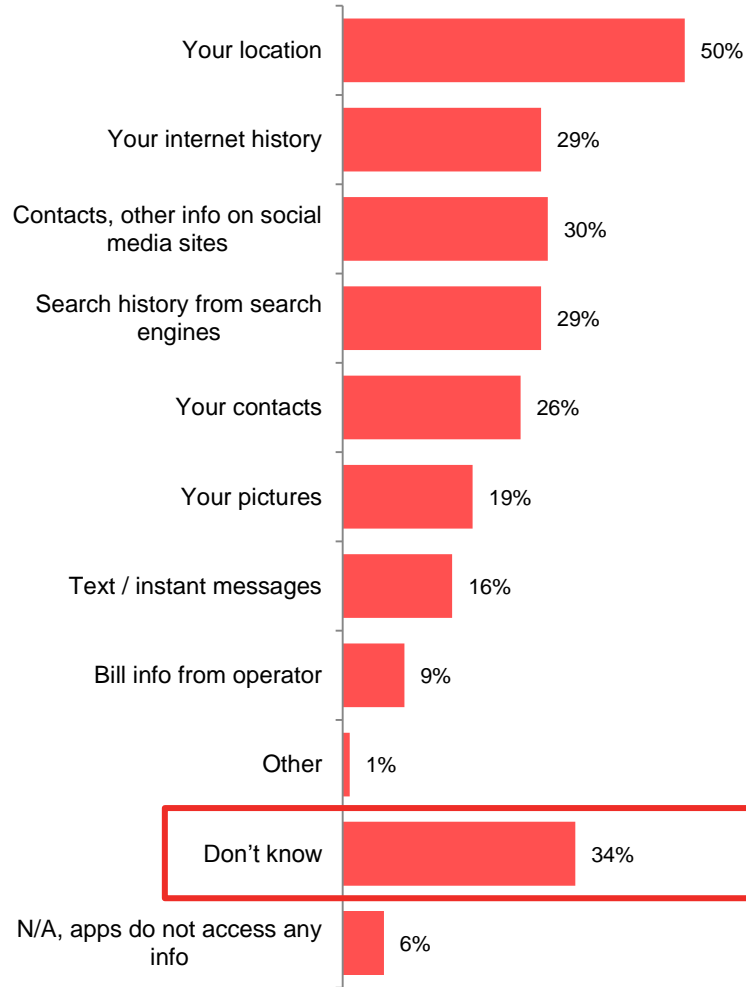
Pre: Thinking about the security on your phone, which, if any, of the following are you worried about? Please tick all that apply

Awareness of information accessed by apps

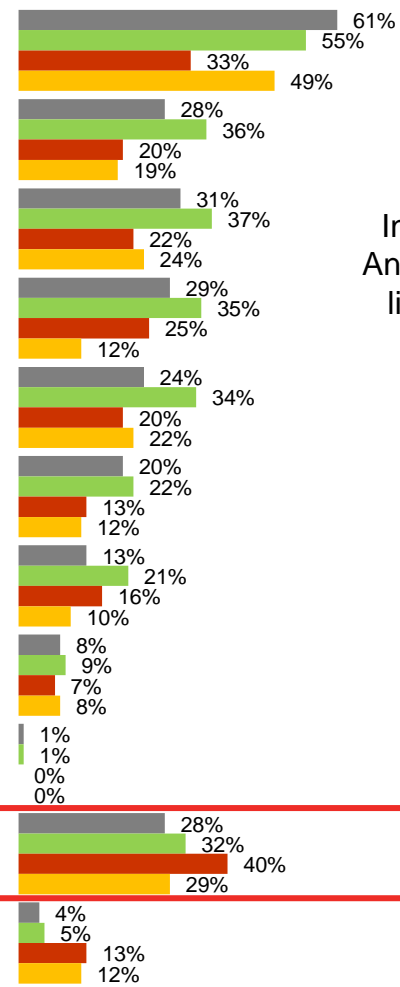


Wave 10 (Mar 12)

Info accessed by apps (By smartphone total)



Info accessed by apps (By operating system)



Apple
Android
RIM
Symbian

In nearly every case, Android users are more likely to be aware of apps asking for permissions.

Base: All qualified respondents that have a smartphone who download apps (1644)

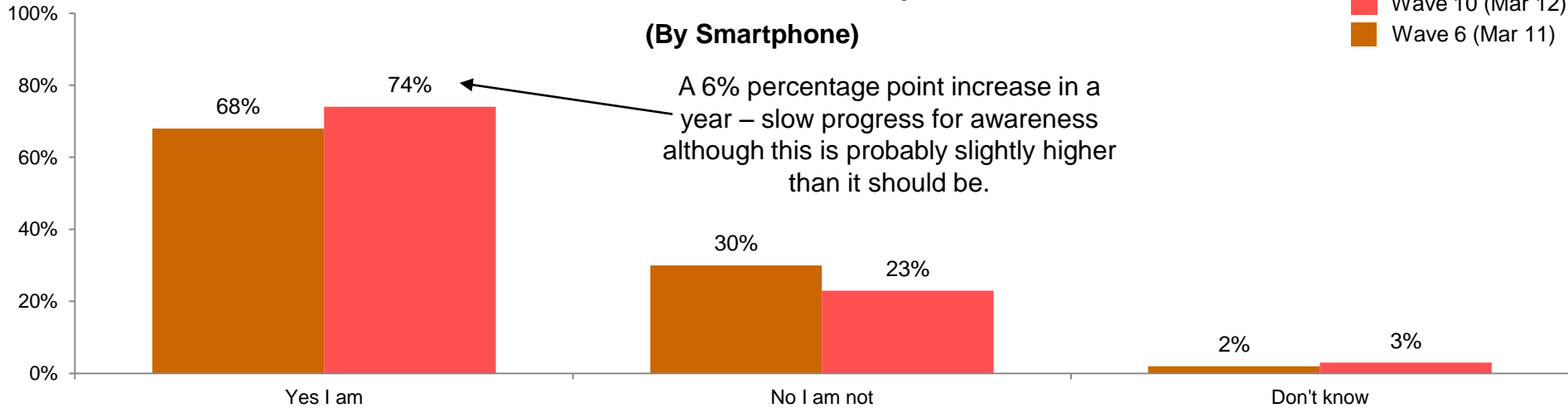
440q1: Thinking about downloading apps to your phone. Which, if any, of the following do you think any apps which you have downloaded are able to access?.



Awareness of viruses on smartphones

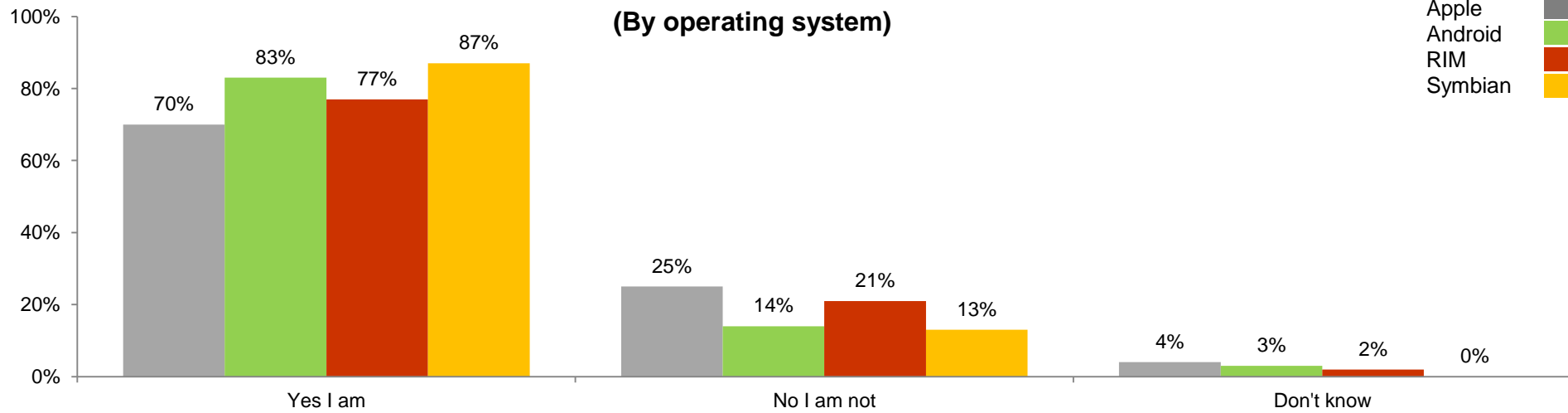
Awareness of viruses on smartphones

(By Smartphone)



Awareness of viruses on smartphones

(By operating system)



Base: All qualified respondents that own a smartphone (2077)

Anti: Are you aware that viruses similar to ones that can affect PC or laptops can also affect smartphones?

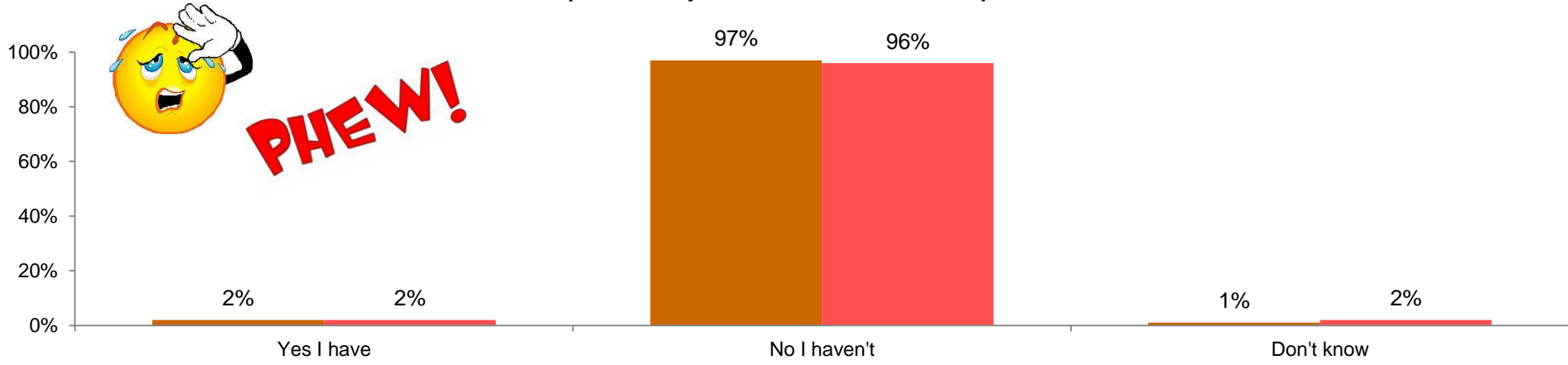




Experienced virus on smartphone

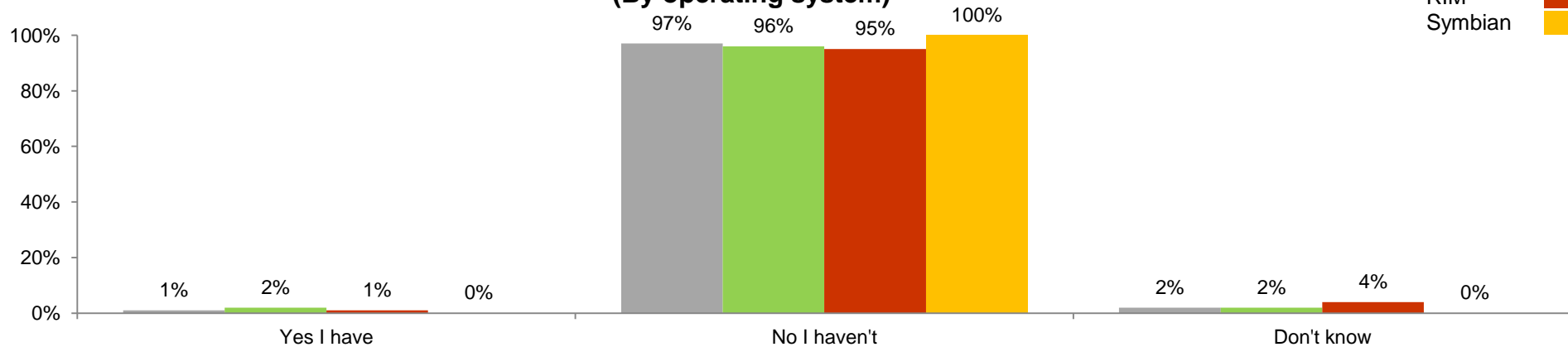
Experienced virus on smartphone (All smartphone aware of viruses)

Wave 10 (Mar 12)
Wave 6 (Mar 11)



Experienced virus on smartphone (By operating system)

Apple
Android
RIM
Symbian



Base: All smartphone aware that viruses can affect smartphones (1535)

Anti1: Have you ever experienced problems with virus' on your smartphone?

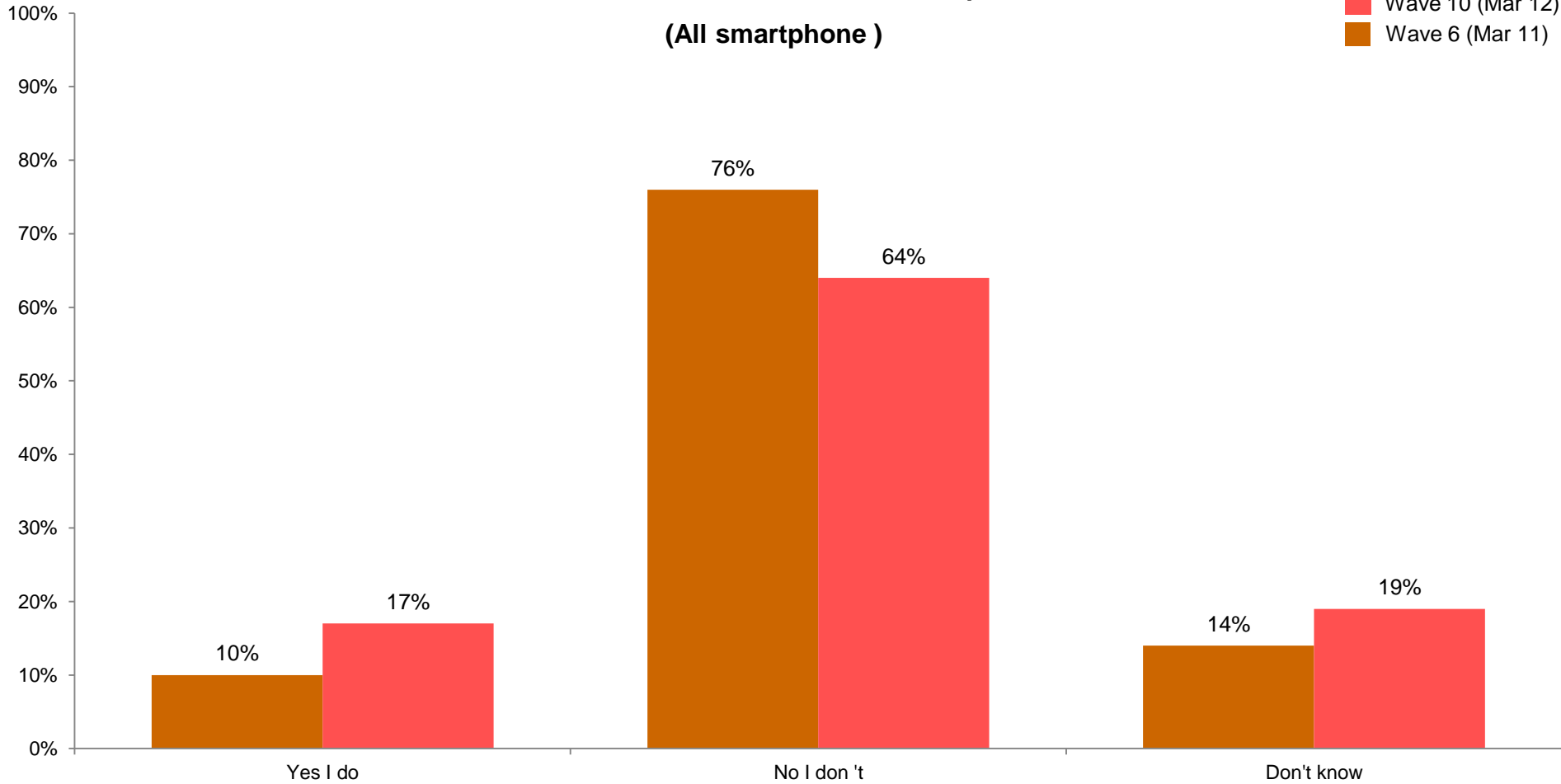
Windows Mobile not shown due to VERY low base size.



Antivirus software installed on smartphone

Antivirus software installed on smartphone (All smartphone)

Wave 10 (Mar 12)
Wave 6 (Mar 11)



Base: All qualified respondents that own a smartphone (2077)

Anti3: Do you currently have antivirus software on your smartphone?

Antivirus software installed on smartphone

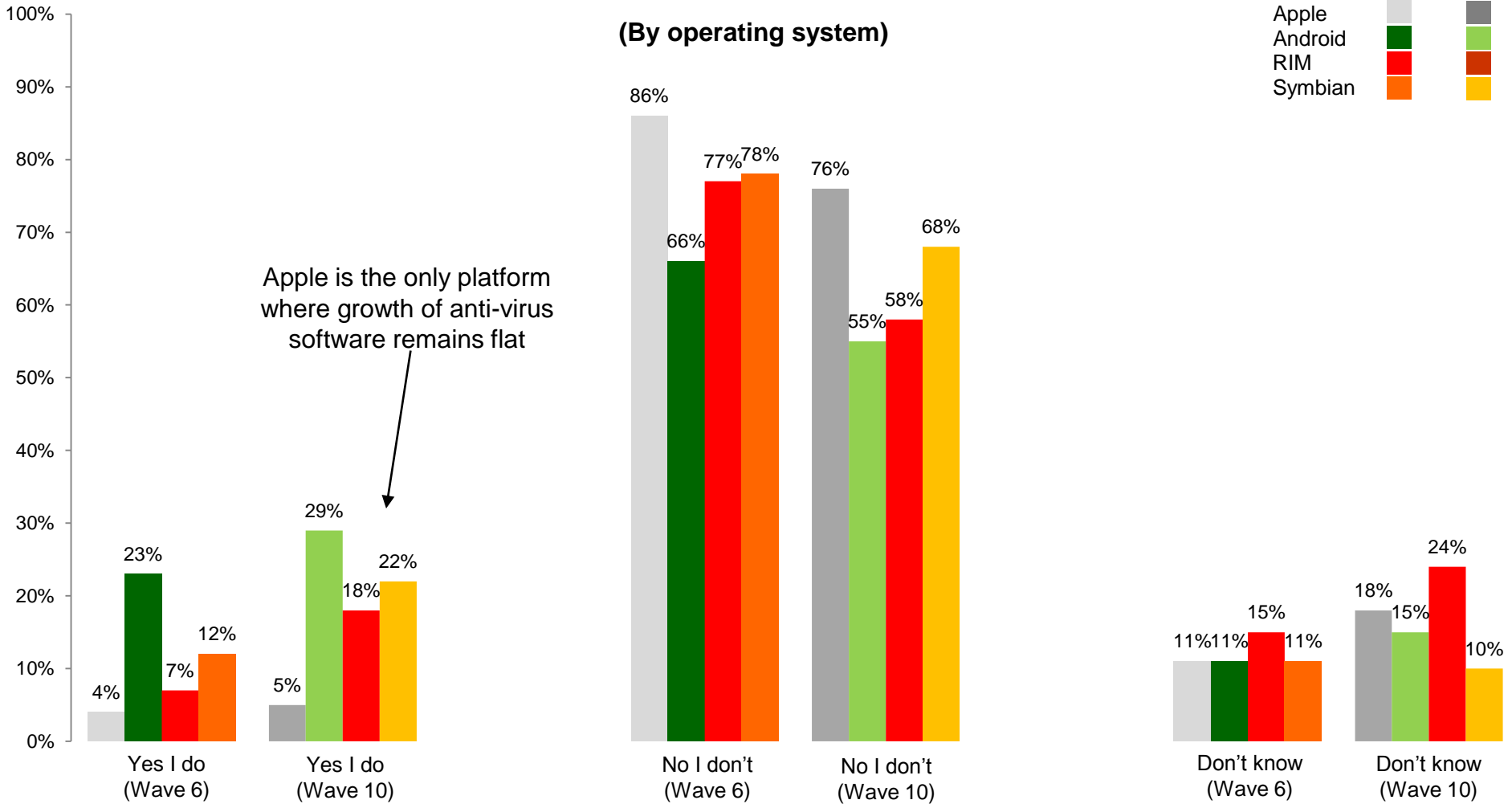


Antivirus software installed on smartphone

(By operating system)

W6 (Mar11) W10 (Mar12)

Apple
Android
RIM
Symbian



Base: All qualified respondents that own a smartphone (2077)

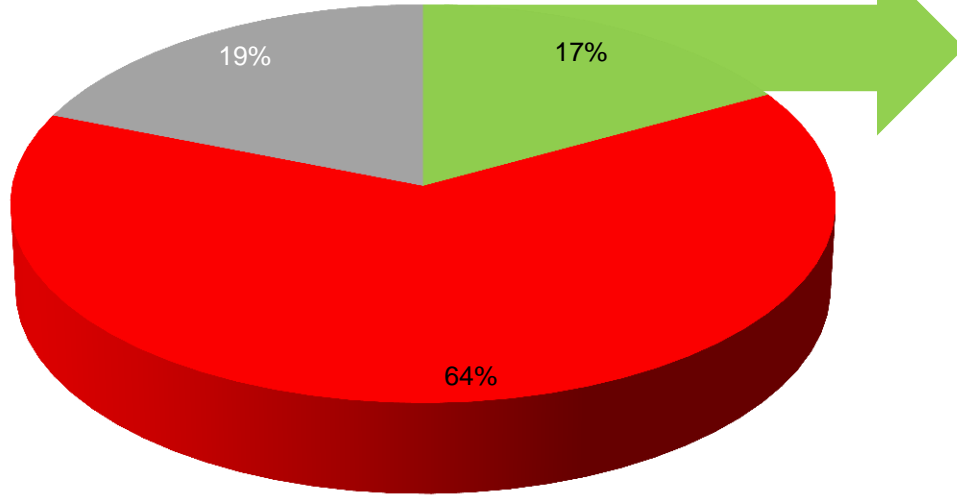
Anti3: Do you currently have antivirus software on your smartphone?

Windows Mobile not shown due to VERY low base size.

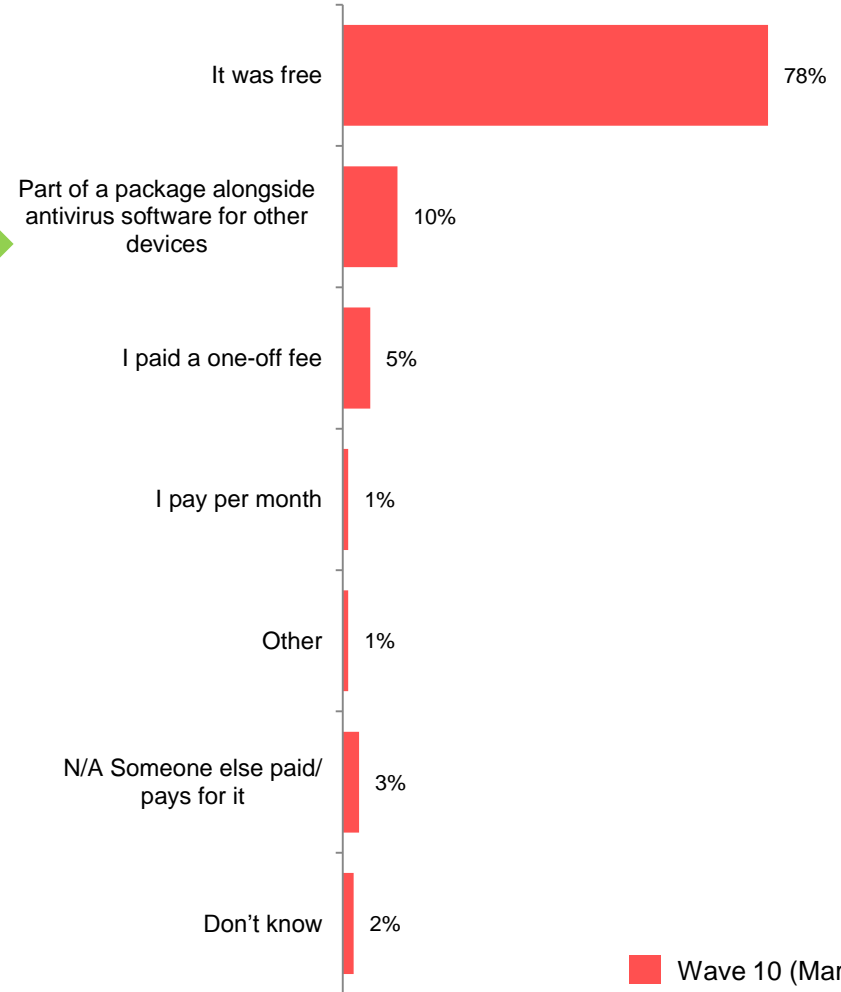
Antivirus and payment



Antivirus software installed on smartphone (All smartphone)



Payment for Antivirus (By smartphone total)



Wave 10 (Mar 12)

Yes
No
Don't know



Base: All qualified respondents that own a smartphone (2077) and that have a smartphone who have antivirus software on their phone (345)

Anti3: Do you currently have antivirus software on your smartphone?

Anti4: And how did you pay for your antivirus software?

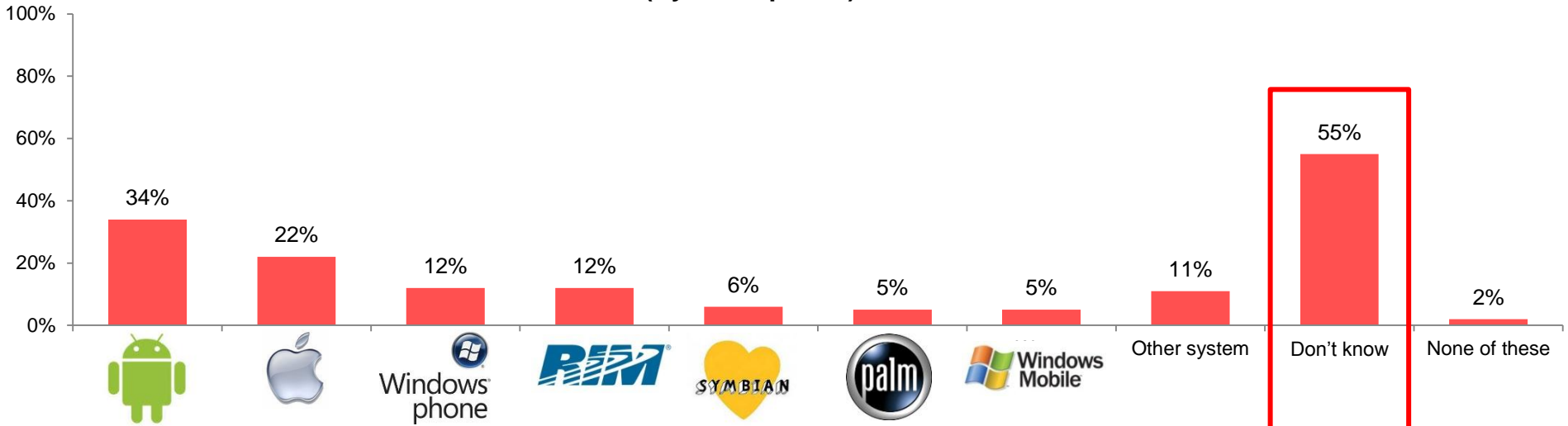
Awareness of operating systems that share personal information



Operating systems that share personal information

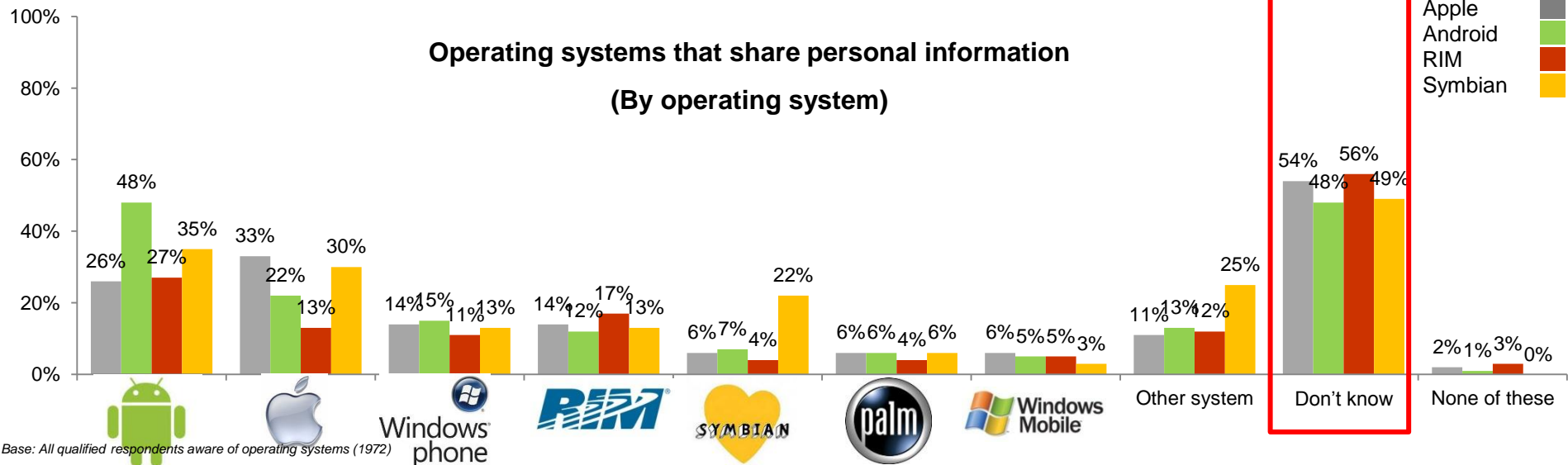
(By Smartphone)

Wave 10 (Mar 12)



Operating systems that share personal information

(By operating system)



Base: All qualified respondents aware of operating systems (1972)

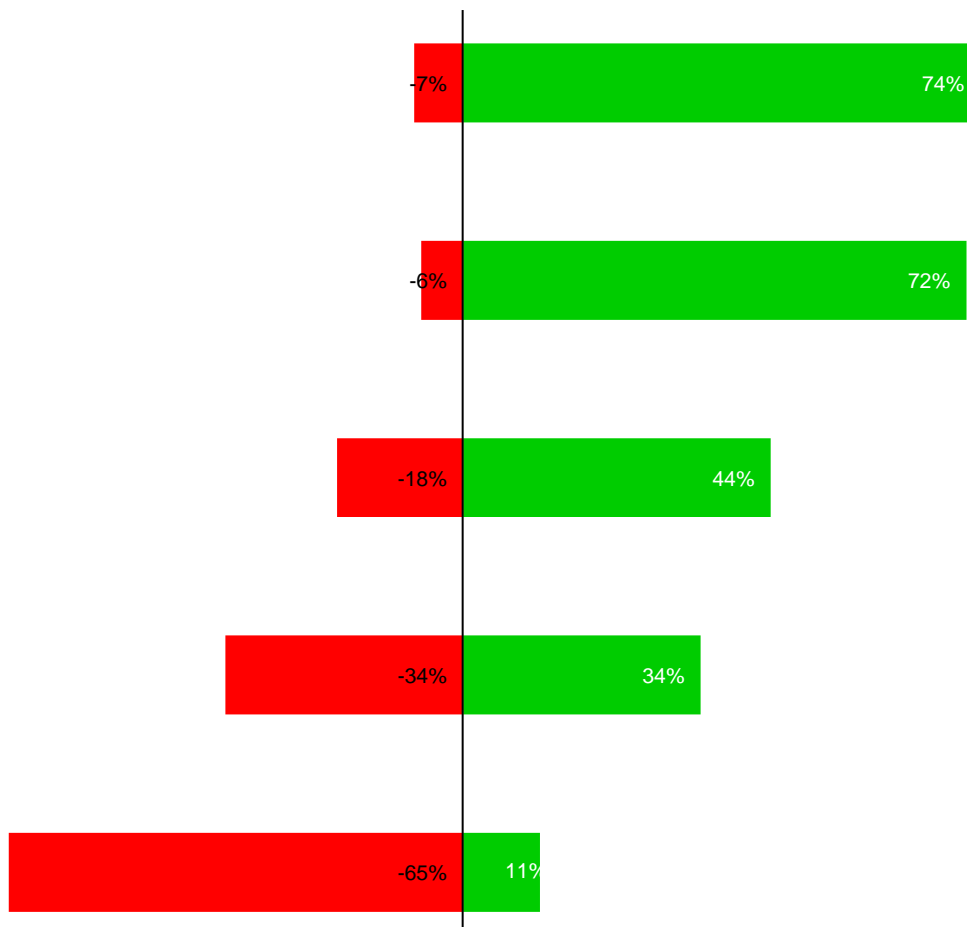
p460q1: Recently in the news, research has uncovered that apps may share personal information with other services or advertising. Which, if any, of the following operating systems that apps use do you think offer this?

Attitudes after finding out about information sharing from Google



Top 2 box
Bottom 2 box

Post-awareness Google attitudes (All smartphone owners)



I am concerned that Google would allow my apps to steal personal data from me

I think Google are wrong in letting apps do this

I want apps regardless

I never read the permissions that the app needs to see before I download the app

I do not care about the permissions and am always happy to download apps

Base: All qualified respondents that have a smartphone (2077)

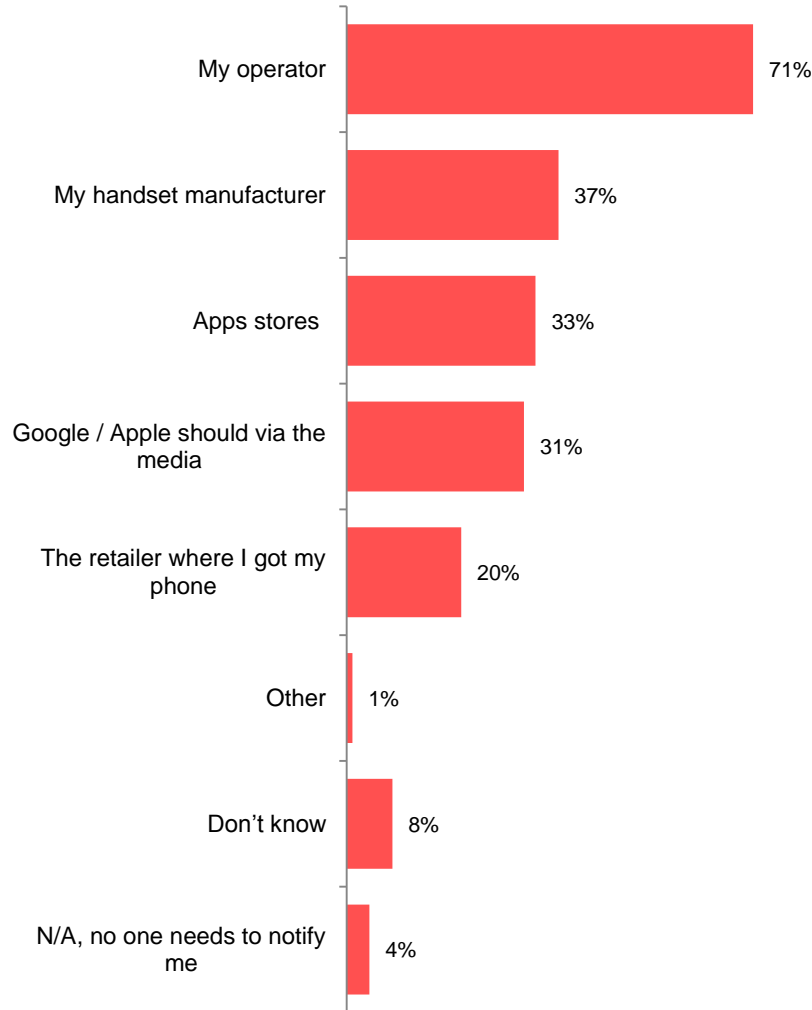
p465q1_1-5: Google's Android operating system allows apps to do this because it is open. This means that some apps could share particular content such as texts, pictures, your contacts, etc. with advertisers or services. Such apps will make you give them permission to share these information with others in return for you being allowed to download the app. To what extent do you agree or disagree with the following statements?



Who should notify the user of virus threats

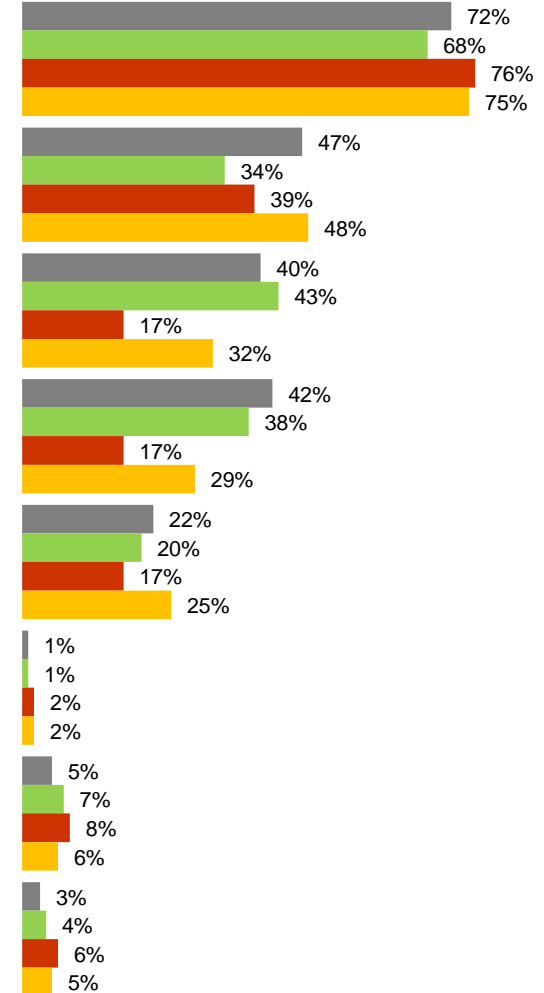
Wave 10 (Mar 12) **Who should notify the user of virus threats**

(By smartphone total)



Who should notify the user of virus threats

(By operating system)



Apple
Android
RIM
Symbian

Base: All qualified respondents that have a smartphone (2077)

Anti6: And who do you think should notify you of dangers linked to viruses that may affect your phone?

What about security on tablets?

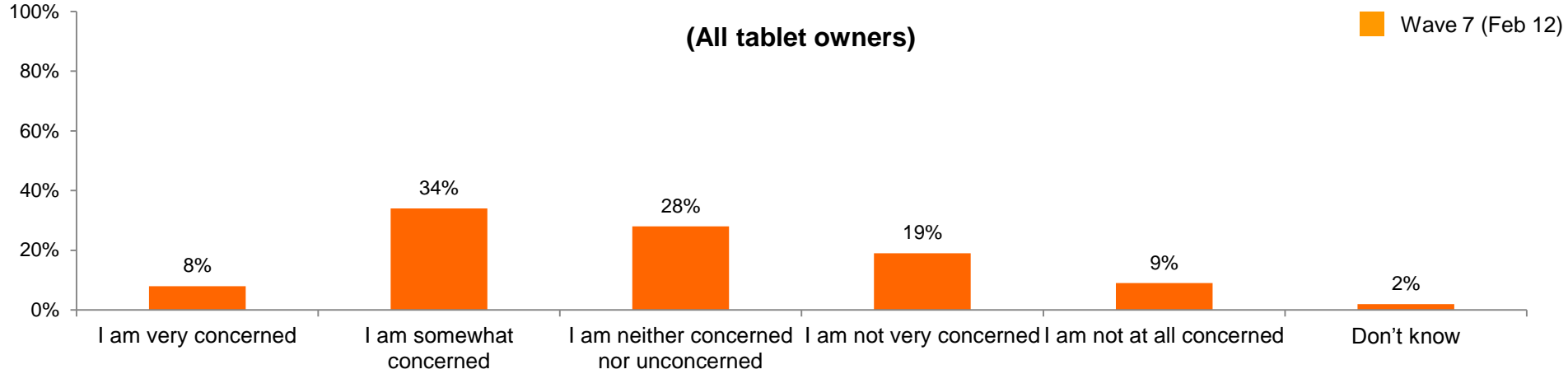




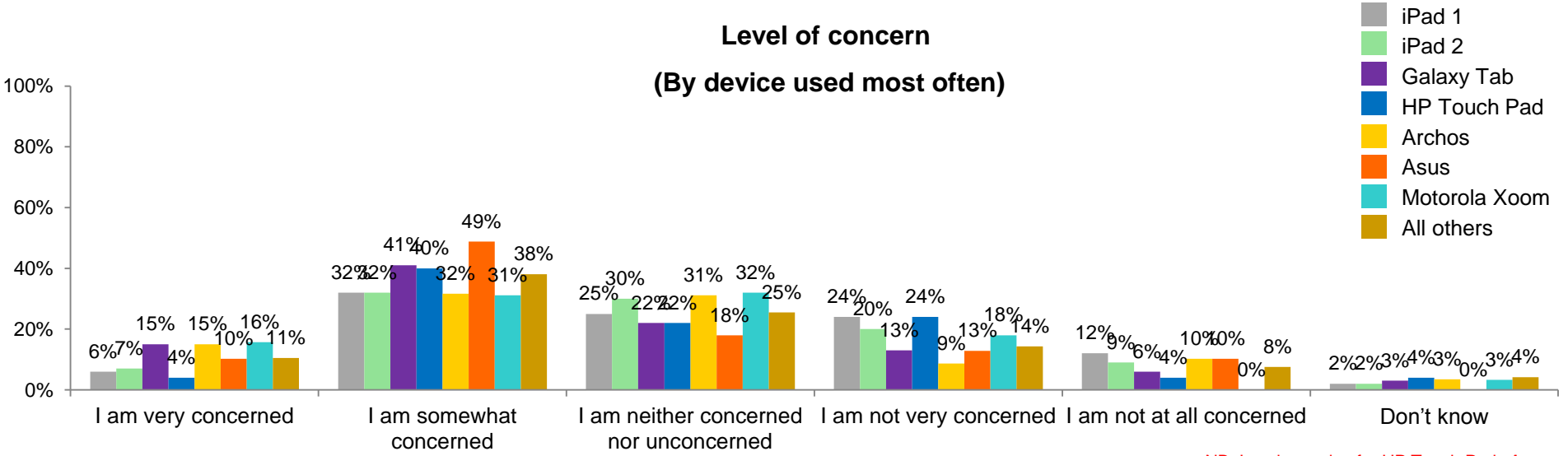
Level of concern about tablet security



Level of concern (All tablet owners)



Level of concern (By device used most often)



NB: Low base size for HP Touch Pad, Asus and Motorola Xoom (<50)

Base: All that own tablets (1652)
SECURITY. We would like you to now think about security on your \$p50q1 tablet. Which, if any, of the following best describes the level of concern you experience towards security and personal data protection on your \$p50q1 tablet?



Experience of problems with security / data protection on tablet

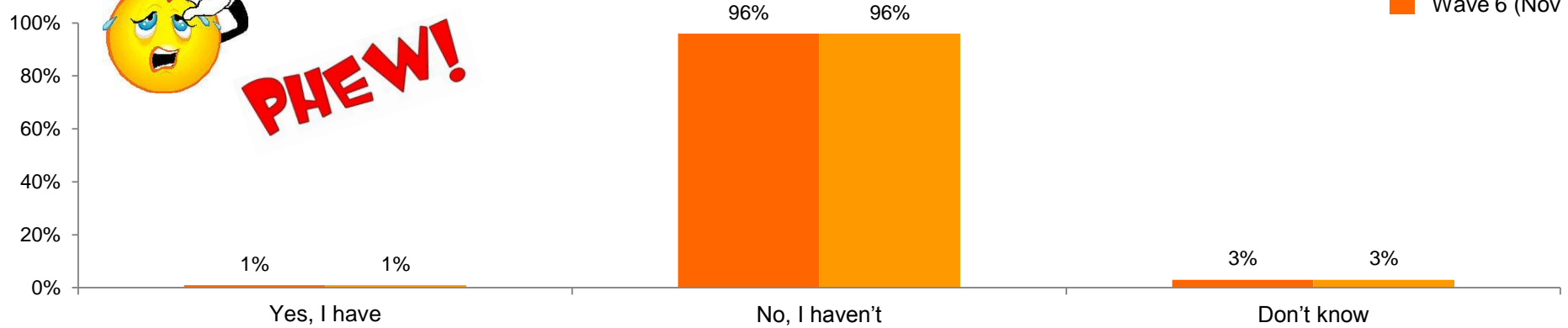


PHEW!

Experienced problems

(All tablet owners)

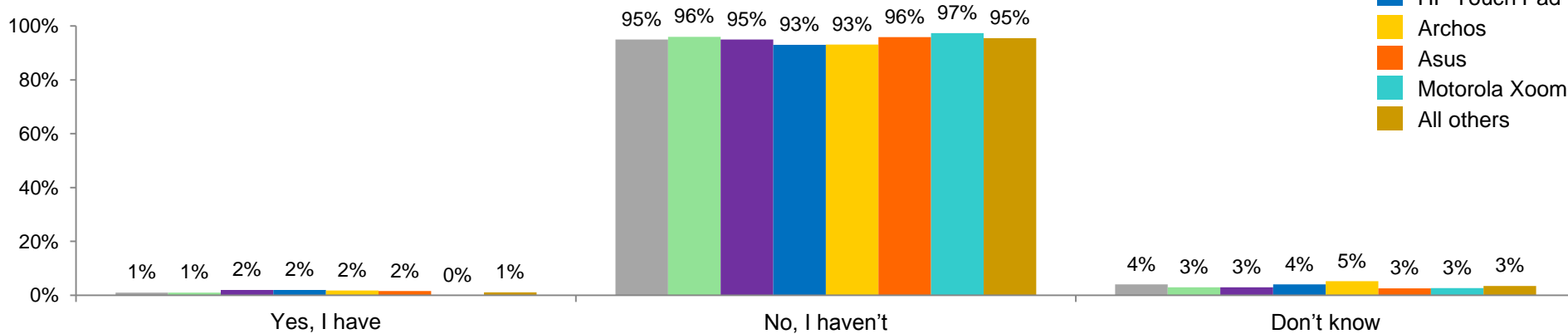
- Wave 7 (Feb 12)
- Wave 6 (Nov 11)



Experienced problems

(By device used most often)

- iPad 1
- iPad 2
- Galaxy Tab
- HP Touch Pad
- Archos
- Asus
- Motorola Xoom
- All others



Base: All that own tablets (1652)
SECURITY1. And have you ever experienced problems with security or personal data protection on your \$p50q1 tablet?

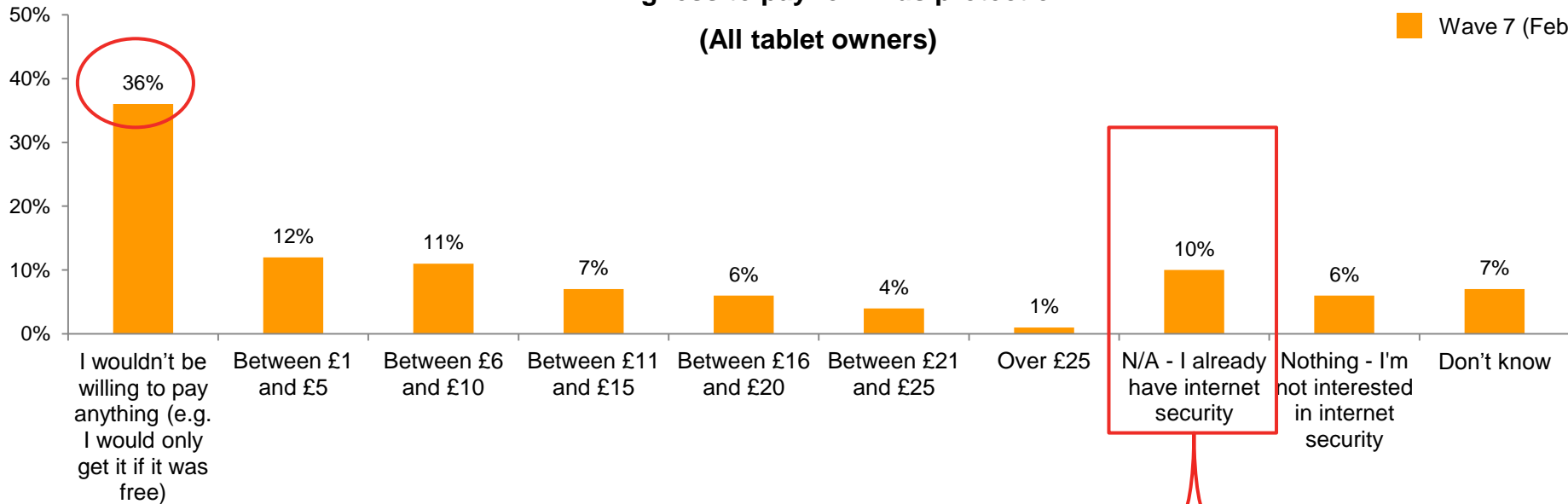
NB: Low base size for HP Touch Pad, Asus and Motorola Xoom (<50)



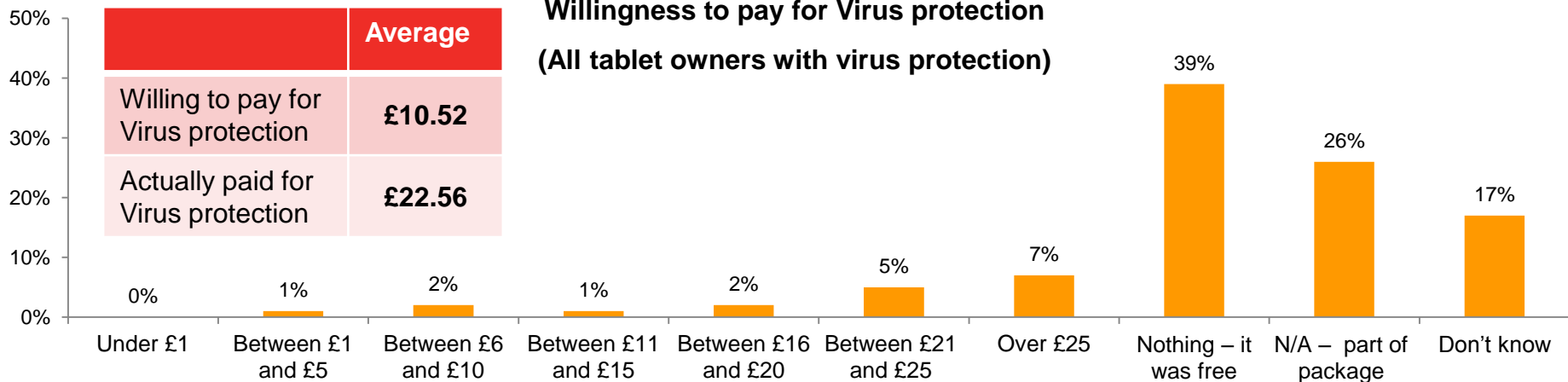
Willingness to pay vs. actual pay for virus protection

Willingness to pay for Virus protection (All tablet owners)

Wave 7 (Feb 12)



Willingness to pay for Virus protection (All tablet owners with virus protection)



	Average
Willing to pay for Virus protection	£10.52
Actually paid for Virus protection	£22.56

Base: All that own tablets (1652) and have got internet security for their tablet (163) SECURITY5. And how much did you pay for your internet security?

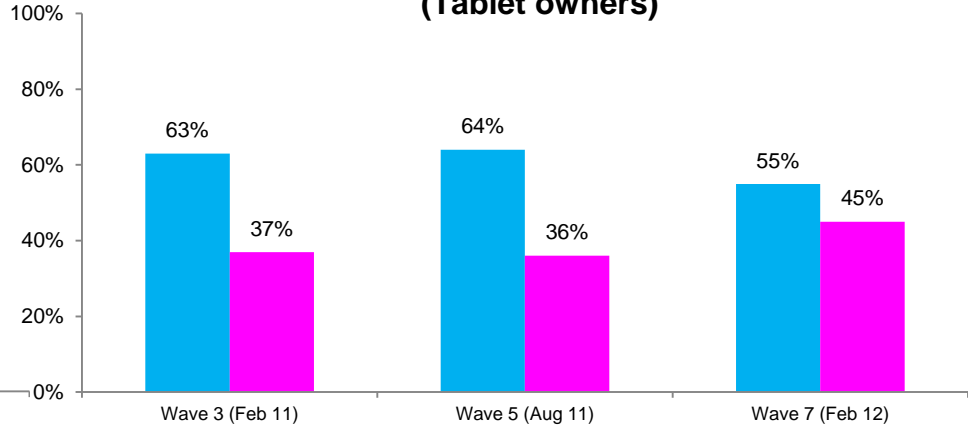
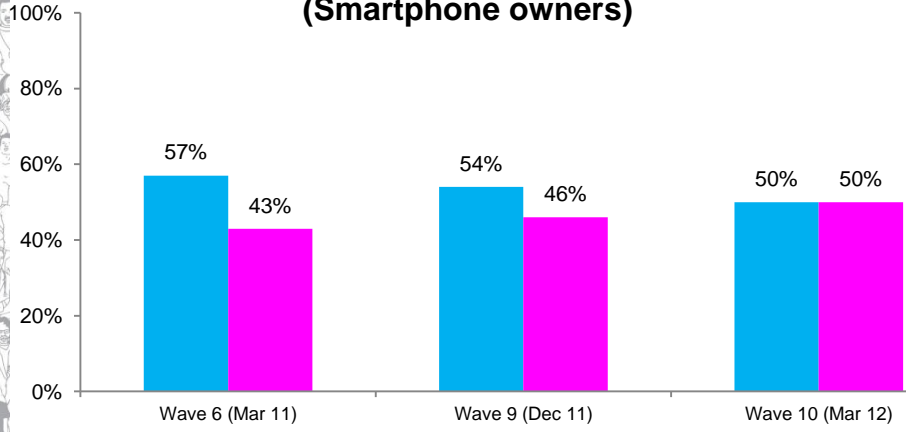
Smartphone and tablet demographics over time



Male
Female

Gender (Smartphone owners)

Gender (Tablet owners)

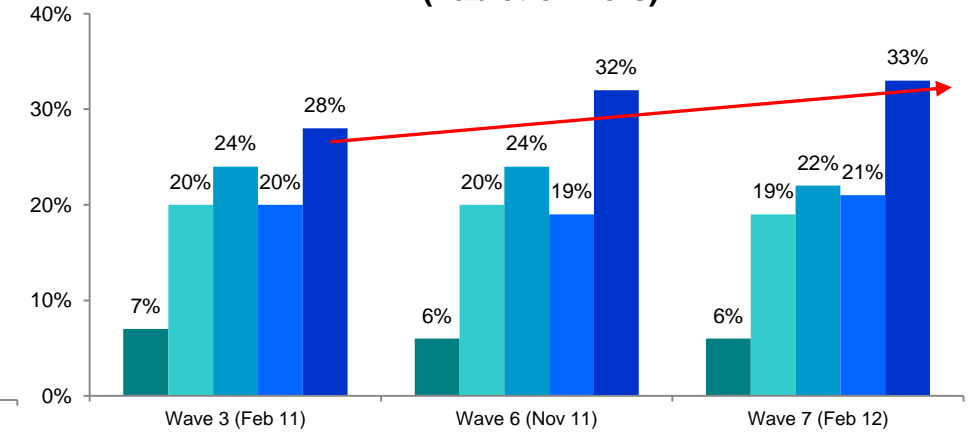
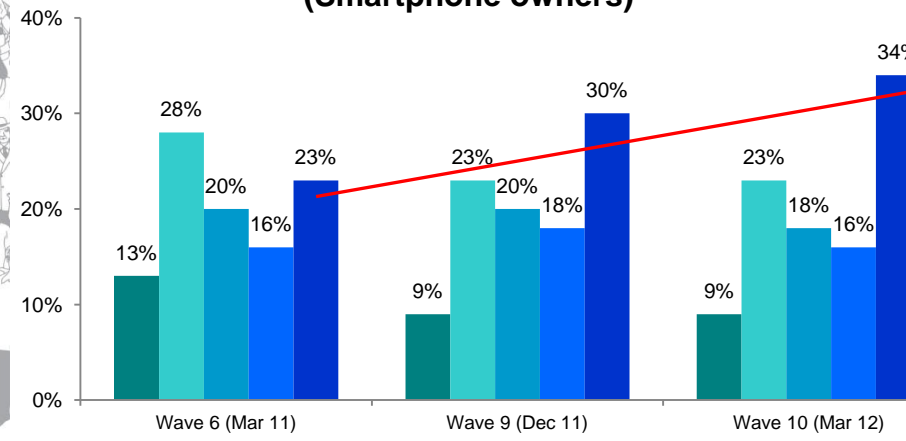


Age (Smartphone owners)

Age (Tablet owners)

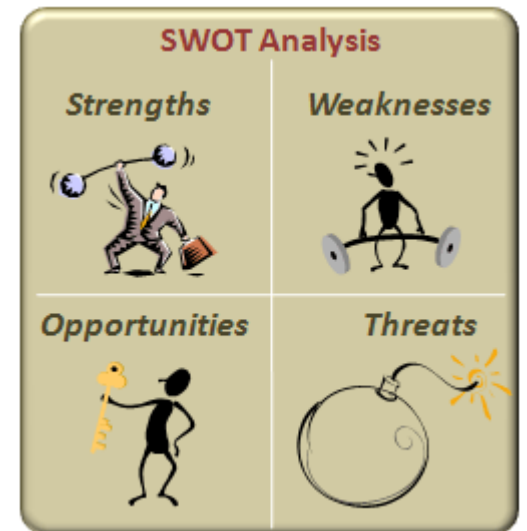


18-24
25-34
35-44
45-54
55+



So what can we take out from this?

A simple SWOT analysis



SWOT analysis

Strengths



Awareness is high amongst smartphone users on contracting viruses.

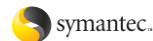


iPhone users feel their devices are significantly more secure than those on other operating systems.



17% of smartphone and 10% of tablet owners have downloaded anti virus software.

Opportunities



TREND
MICRO



Opportunity to communicate dangers of viruses, looking after handsets and perhaps help anti-virus software offerings.

41% of tablet owners would potentially pay for anti virus software on their device.

Weaknesses



Whilst awareness is high of viruses, importance of protecting device is fairly low. More needed here.



A third of smartphone owners don't know what their apps have access to.



28% of tablet owners are not concerned about contracting a virus.

Threats



Don't rest on laurels.



Whole industry needs to pull in one direction to educate the consumer



Direct relationships are the most under threat – operators need to inform customers of the harm of downloading apps before it's too late and customers that contract a virus blame them.