



# MEF

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## GLOBAL CONSUMER TRUST REPORT 2016

UNDERSTANDING THE IMPACT OF GLOBAL ATTITUDES TOWARDS DATA PRIVACY AND SECURITY IN THE MOBILE ECOSYSTEM



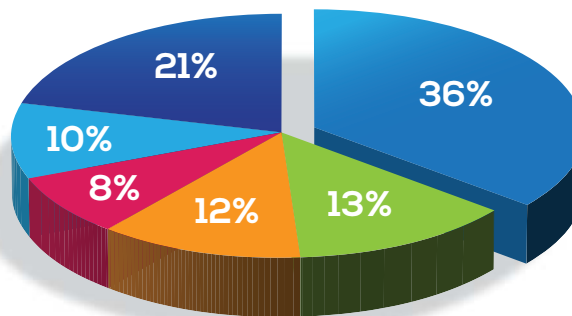
### EXECUTIVE SUMMARY

This third annual Global Consumer Trust Report in association with AVG Technologies studies the attitudes and behaviours relating to privacy and security of over 5000 mobile media users in both developed and growth markets – in order to identify trends in order to better understand the mindset of the end user and, crucially, how this is likely to impact the mobile ecosystem.

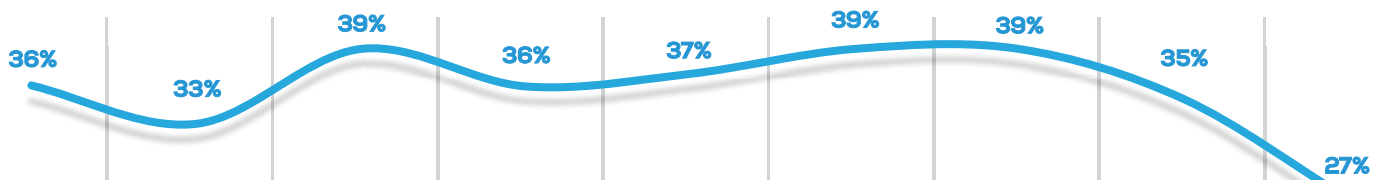
The study carried out in H2 2015 identifies growing awareness among all mobile media users when it comes to privacy and security and reveals clear opportunities for businesses to leverage trust when it comes to innovating new business models and building sustainable relationships with mobile consumers.

### A LACK OF TRUST REMAINS THE SINGLE BIGGEST BARRIER TO GROWTH

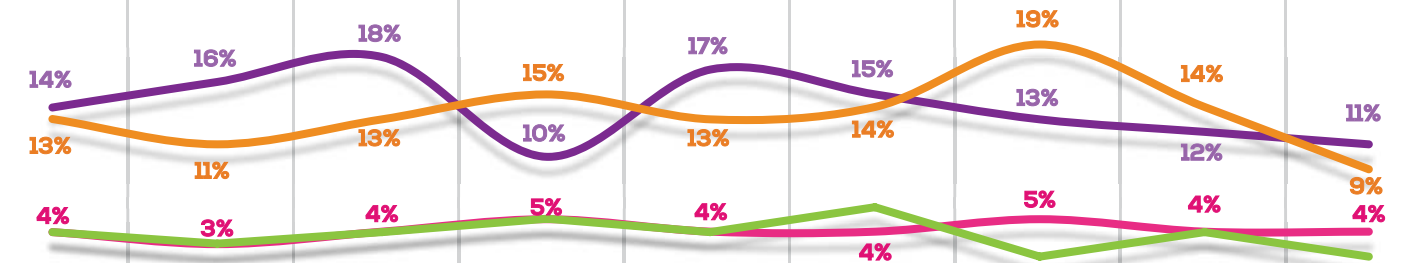
Trust – or a lack of it - continues to be the biggest barrier in the mobile ecosystem. **36%** say the main reason they don't download or use more mobile apps and services is because they either don't want to give up personal information (**14%**); don't trust the security (**13%**); have had a bad experience or had heard negative news stories (**both 4%**).



- TRUST RELATED
- I DON'T LIMIT MY APP USAGE
- TOO EXPENSIVE
- NETWORK TOO SLOW
- OTHER
- NO NEED



#### WHAT IS THE MAIN REASON YOU DON'T DOWNLOAD AND/OR USE MORE MOBILE APPS AND SERVICES?



GLOBAL TOTAL



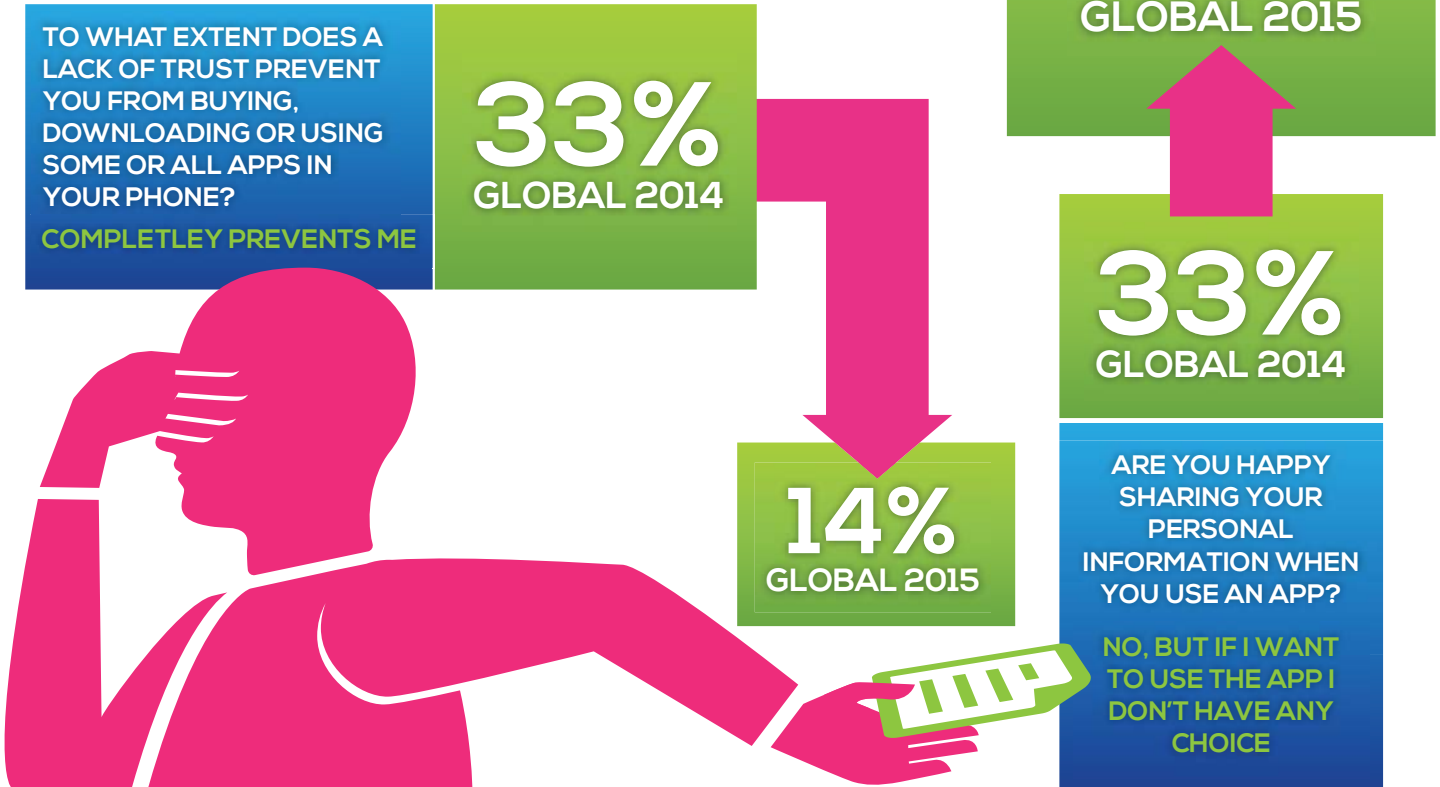
- NET TRUST
- I DON'T WANT TO SHARE PERSONAL INFORMATION LIKE MY LOCATION OR BROWSING HISTORY.
- I DON'T TRUST THE SECURITY
- I'VE READ OR HEARD NEGATIVE NEWS STORIES IN THE MEDIA
- I HAD A PREVIOUS BAD EXPERIENCE

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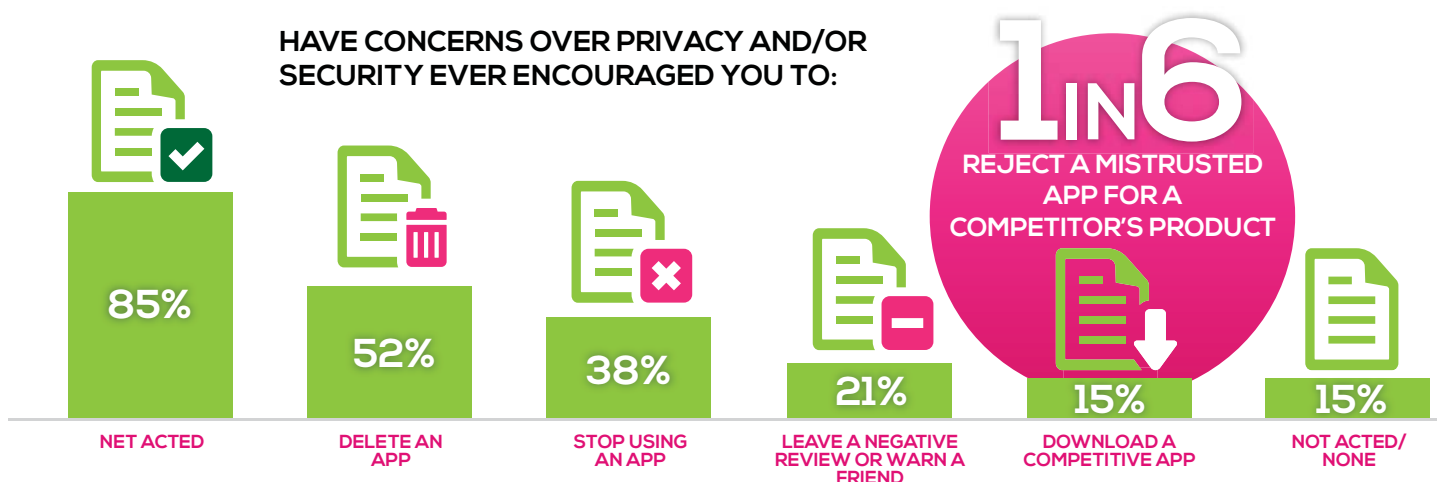
## THE RISE OF THE 'RELUCTANT SHARER'

The number of people who were completely put off using apps by privacy and security concerns has more than halved (from **33%** to **14%**). However, this can be explained at least in part by the rise of the 'reluctant sharer'. The study found the number of people who don't want to share personal information but know they must if they want to use the app leaped to **41%** from **33%**. No fewer than a third of the respondents in all the eight countries surveyed fall into this category increasing to half of all US and German mobile users (**53%** and **47%** respectively), a rise of a quarter in the US and a third in Germany.



## THE TRUST-CONSCIOUS CONSUMER

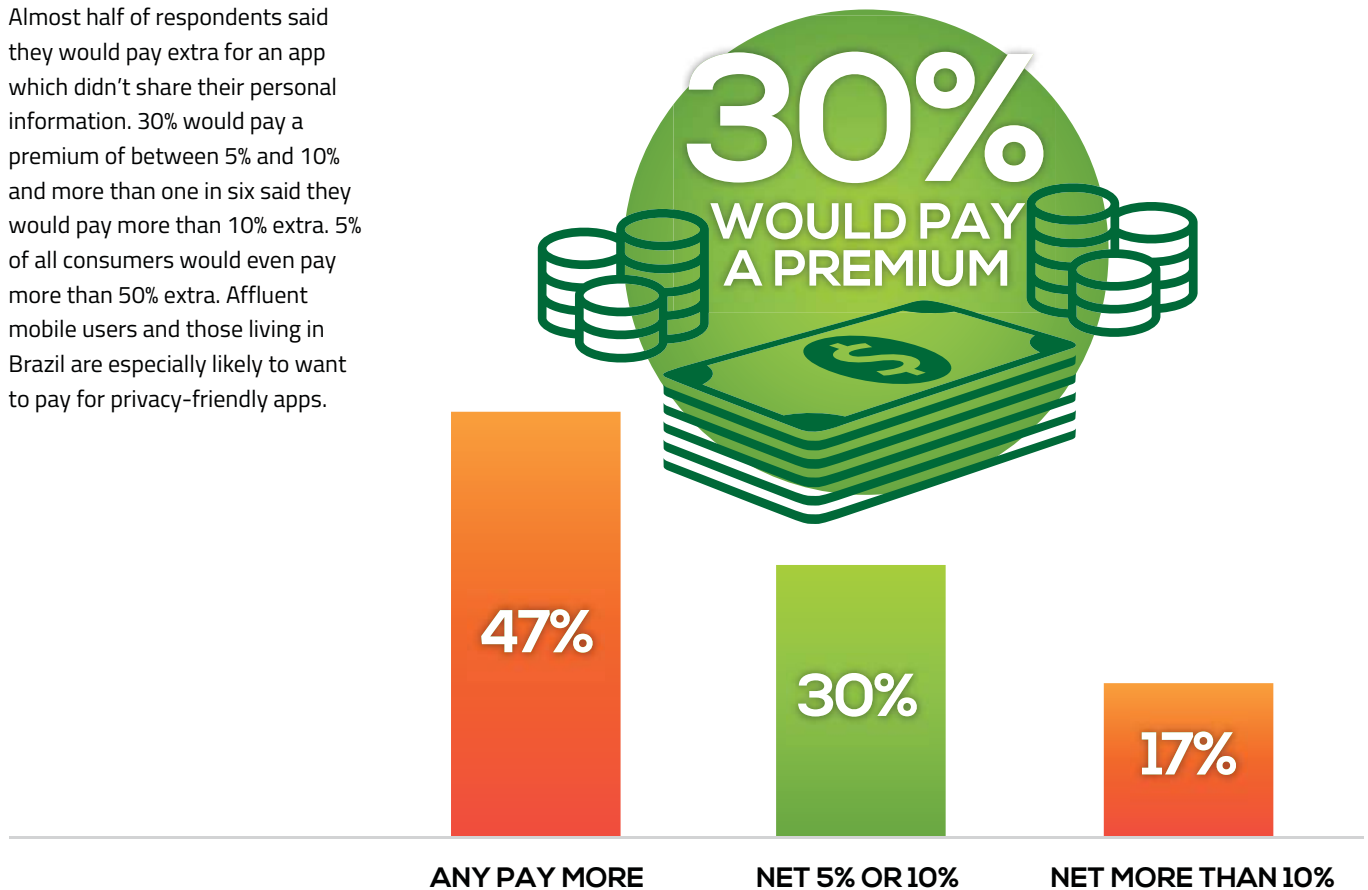
More than a half (**52%**) deleted an app that worried them. A third (**38%**) stopped using it. A fifth (**21%**) left a negative review or warned a friend. Significantly, **15%** downloaded a competitive app and used that instead.



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# HALF OF ALL CONSUMERS WOULD PAY FOR PRIVACY-FRIENDLY APPS

Almost half of respondents said they would pay extra for an app which didn't share their personal information. 30% would pay a premium of between 5% and 10% and more than one in six said they would pay more than 10% extra. 5% of all consumers would even pay more than 50% extra. Affluent mobile users and those living in Brazil are especially likely to want to pay for privacy-friendly apps.



## OTHER KEY FINDINGS



IN 2013, **A FIFTH (21%)** SAID THEY WERE **ALWAYS HAPPY TO SHARE** PERSONAL DATA WITH AN APP. BY 2015 THIS HAD **FALLEN TO JUST 6%**.



**SOCIAL NETWORKS** ARE THE **LEAST TRUSTED** APP CATEGORY (**39%**). CONSUMERS DO SEEM TO TRUST HEALTH AND MEDICAL APPS, DESPITE THE SENSITIVITY OF THAT DATA. **ONLY 14% SAID MEDICAL APPS WERE UNTRUSTWORTHY** AND **FOR HEALTH AND FITNESS APPS IT WAS JUST 12%**.



**FINANCIAL INFORMATION (26%)** IS SEEN AS THE **MOST SENSITIVE KIND OF PERSONAL DATA**, ABOVE PHOTOS (18%) AND CONTACTS (15%).



**21% OF MOBILE USERS** STILL **TAKE NO ACTION TO SECURE THEIR DEVICE**. THERE HAS, HOWEVER, BEEN A SIGNIFICANT **INCREASE IN THE USE OF BIOMETRIC SECURITY (11% VS 7% IN 2014)**.



THE BIGGEST **REASON FOR CONSUMERS LOSING TRUST IN AN APP** IS WHEN THEY **CAN'T FIND ITS PRIVACY POLICY (42%)**.

## ABOUT THE REPORT



Commissioned by global trade body Mobile Ecosystem Forum the field study was carried out by On Device Research in Q3 2015. It questioned over 5,200 mobile media users in 8 countries, namely: Brazil, China, France, Germany, India, South Africa, UK and US.

The full Global Consumer Trust Report 2016 and 8-country data sets are available to download FREE for MEF members only. Visit [www.mobileecosystemforum.com](http://www.mobileecosystemforum.com) for further details. To purchase a copy of the report worth £1,950 please contact MEF via the web site.



### ABOUT MEF

The Mobile Ecosystem Forum is a global trade body that acts as an impartial and authoritative champion for addressing issues affecting the broadening mobile ecosystem. We provide our members with a global and cross-sector platform for networking, collaboration and advancing industry solutions. The goal is to accelerate the growth of a sustainable mobile ecosystem that drives inclusion for all and delivers trusted services that enrich the lives of consumers worldwide. Established in 2000 and headquartered in the UK, MEF has Regional Chapters across Africa, Asia, Europe, Middle East, North and Latin America.

[www.mobileecosystemforum.com](http://www.mobileecosystemforum.com)



### ABOUT AVG TECHNOLOGIES (NYSE: AVG)

AVG is the online security company providing leading software and services to secure devices, data and people. Our award-winning Consumer portfolio includes internet security, performance optimization, location services, data controls and insights, personal privacy and identity protection for mobile devices and desktops. And our Business portfolio – delivered by managed service providers, VARs and resellers – offers IT administration, control and reporting, integrated security, and mobile device management that simplify and protect businesses.

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### ABOUT ON DEVICE RESEARCH

On Device Research is a research company that gathers responses on mobile devices - so far we've sent over 2.3 million surveys across 53 countries. By conducting research on mobile phones and tablet computers we can reach consumers wherever they are, at any time and in any location. Mobile research also brings fresh, instant responses that accurately capture consumers' feelings, thoughts and opinions.

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