Internet Security Priorities
Methodology

- The Benenson Strategy Group and American Viewpoint conducted 1,000 telephone interviews from November 12-18, 2013.

- Interviews were conducted with registered voters nationwide who use the Internet.
  - Voters were defined as those who voted in the 2012 presidential election or registered to vote after November 2012.

- The margin of error for the entire data set is ±3.02% at the 95% confidence level. It is higher among subgroups.

Contact Information

- For questions about the data contained in this presentation, please contact:
  - Danny Franklin, Benenson Strategy Group: dfranklin@bsgco.com; 212-702-8777
  - David Kanevsky, American Viewpoint: david@amview.com; 703-684-3325
Voters Are Much More Worried about Hacking than Tracking
Voters Deeply Worried about Security of Their Info; Stopping Tracking for Ads Is Not a Priority

Voters 20x more likely to say top concern is ID theft than to say targeted ads

Key Attitudes on Privacy and Security

**Worry about Privacy and Security**

- **Not Worried**
  - Personal Info Stolen: 75%
  - History Tracked for Ads: 25%

- **Worried**
  - Personal Info Stolen: 25%
  - History Tracked for Ads: 44%

**Top Concern about Online Privacy and Security ( Forced Choice)**

- Having your information or identity stolen online: 58%
- Kids not being safe online: 18%
- Government being able to access your info online: 15%
- Services targeting ads to you based on your online activity: 3%
- All of these: 5%

---

How worried are you about your personal information, such as your Social Security number or financial records, being stolen by online hackers?

How worried are you about your online search and browsing history or emails being tracked by or sold by internet companies to target ads based on that activity?

Which of these are you most worried about?
Overall, Voters Are 5x More Concerned with Hacking over Tracking

Priorities: Worries about Security and Privacy

Which generally worries you more?

- The information I share online will be hacked to cause harm or steal from me
  - All Voters (100%): 80%
  - Worried about Hacking (75%): 84%
  - Worried about Tracking (54%): 79%

- Companies will use the information I share online to target advertising to me
  - All Voters (100%): 16%
  - Worried about Hacking (75%): 14%
  - Worried about Tracking (54%): 18%
Protecting Security Is Far More Important to Voters than Protecting Browsing History

Even voters concerned about Internet tracking clearly prioritize security

Priorities: Protecting Online Security and Privacy
Which is more important to you?

- Protecting your personal information, such as your Social Security number or financial records, from online hackers: 87%
- Protecting information about your online behavior, such as your online searches and browsing history or emails, from Internet companies who target ads based on that activity: 6%
- No difference/Don’t know/Refused: 7%

Which is more important to you...?

- All Voters (100%)
  - Protecting information about your online behavior: 6%
  - Protecting your personal information: 87%
  - No difference/Don’t know/Refused: 7%

- Worried about Hacking (75%)
  - Protecting information about your online behavior: 6%
  - Protecting your personal information: 88%
  - No difference/Don’t know/Refused: 6%

- Worried about Tracking (54%)
  - Protecting information about your online behavior: 8%
  - Protecting your personal information: 84%
  - No difference/Don’t know/Refused: 8%

(American Viewpoint)
Voters Want a Free Internet Paid For by Ads rather than a Fee-Based Internet with No Ads

Even voters who would pay to have no ads say security is more important

When it comes to online services like email or social networks, which would you prefer?

61%  
A free service that is supported by ads that are targeted to you based on your online activity

33%  
A service that you pay a fee to use that doesn't have ads that are targeted to you based on your online activity

This is the most popular position across demographic groups, with young people and heavy Internet users even more likely to agree:

✓ 18-34 yrs: 69% free service
✓ Use Internet more than once/day: 65% free service

Even those who would pay to have no ads are more much more concerned about security:

✓ 86% say it’s more important to protect their personal info from hackers vs.
✓ 8% who say it’s more important to protect browsing info from companies
Voters Feel Vulnerable to Hacking and Want the Government To Act
Security Is a Priority Due to Acute Awareness of Risk: Most Are or Know a Victim of Online Breach

Experience with Online Security Breaches

Have you or anyone you know had your online accounts breached?

- **Financial account breached**
  - 50% Know someone or themselves
  - 49% Don't know anyone
  - **21%** say they personally have had a financial breach

- **Email account breached**
  - 55% Know someone or themselves
  - 43% Don't know anyone
  - **23%** say they personally have had an email breach

Received a suspicious email you suspected came from a breached account:

- **62%** Yes
- **36%** No
Consequently, There Is Strong and Decisive Desire for Gov’t Action on Identity Theft

Want gov’t to go after criminal hackers not the companies that were hacked

Role for Government In Protecting Security

Which of the following comes closer to your view?

- **74%** strongly believe this
  - The federal gov’t needs to **do more** to prevent and act against identity theft

What should be the more important priority for government regulators?

- **60%** tracking down the hackers who steal consumer data from companies and individuals
- **34%** investigating the security practices of the company that was hacked and had consumer data stolen

Which of the following comes closer to your view? And would you say you feel strongly about that or not too strongly about that?

When a company is the target of an online security breach, what should be the more important priority for government regulators?
Voters Choose To Share Info; Know How and Act To Protect Privacy
Voters Share Information Online through a Variety of Channels

**Online Behaviors: % Do Each Monthly or More**

- Send personal emails: 80%
- Login to a social networking site: 70%
- Use online banking: 64%
- Make a purchase online with a credit card: 56%
- Post a status update on a social networking site: 51%
- Allow your location to be used by a mobile app: 47%
- Post a photo or video you took to share with friends: 40%
- Use a mobile banking app: 36%
- Get info from a health insurer or your doctor online: 21%

**Voters Have Accounts on:**

- Facebook: 69%
- Amazon: 53%
- Google: 46%
- LinkedIn: 25%
- Twitter: 23%
- Pinterest: 20%
- Instagram: 16%

**And Access Them through:**

- Computer: 91%
- Smartphone: 63%
- Tablet: 44%
- E-Reader: 22%

*Showing activities 20% or more do monthly*
Voters Are Taking Concrete Steps To Protect Themselves, Especially on Security

<table>
<thead>
<tr>
<th>Protecting Security</th>
<th>% have taken this step</th>
</tr>
</thead>
<tbody>
<tr>
<td>Required a password to unlock your device</td>
<td>83%</td>
</tr>
<tr>
<td>Used a different password for each service</td>
<td>76%</td>
</tr>
<tr>
<td>Not allowing a service to remember your credit card information</td>
<td>73%</td>
</tr>
<tr>
<td>Set your browser to never remember login info</td>
<td>66%</td>
</tr>
<tr>
<td>Signed up to use a two-step sign-on process</td>
<td>57%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Protecting Privacy</th>
<th>% have taken this step</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set your browser to disable cookies</td>
<td>65%</td>
</tr>
<tr>
<td>Read privacy policies for websites you visit</td>
<td>65%</td>
</tr>
<tr>
<td>Set privacy settings so that only certain friends can see your page</td>
<td>64%</td>
</tr>
<tr>
<td>Blocked an app from accessing your location information</td>
<td>53%</td>
</tr>
<tr>
<td>Removed or taken down personal information about yourself</td>
<td>47%</td>
</tr>
<tr>
<td>Used the private browsing mode on your internet browser</td>
<td>37%</td>
</tr>
<tr>
<td>Set privacy settings so that you do not come up in searches</td>
<td>36%</td>
</tr>
</tbody>
</table>

Have you ever taken this step or have you never done this?
Most Report Being Cautious with Passwords, but Secure Password Habits Not Universal

1 in 3 voters who use same password across Internet at high risk for theft

Password Behaviors

Which of the Following Best Describes You?

- You have **different passwords** on almost every site that you use (63%)
- You tend to use the **same one or two passwords** on most of your sites (32%)

Now think about the passwords that you have on your various online accounts. Which of the following statements would you say best describes you?
Voters Knowledgeable about Steps To Protect Their Privacy and Take Action To Do So

*Those who adjusted settings concerned about security of personal info*

Have you ever adjusted the privacy settings on a social networking or online account?

<table>
<thead>
<tr>
<th>Yes - 68%</th>
<th>No - 31%</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Main reason why you changed your privacy settings (Open-End)</strong></td>
<td></td>
</tr>
<tr>
<td>Protecting security of my information (NET)</td>
<td>47%</td>
</tr>
<tr>
<td>Trying to protect my personal information</td>
<td>41%</td>
</tr>
<tr>
<td>My account has been hacked in the past</td>
<td>7%</td>
</tr>
<tr>
<td><strong>Keeping individuals out of my private life (NET)</strong></td>
<td>32%</td>
</tr>
<tr>
<td>Didn't want strangers seeing this info/Don't want to be harassed or stalked</td>
<td>16%</td>
</tr>
<tr>
<td>Wanted to limit who had access/Didn’t want people I know to see it</td>
<td>16%</td>
</tr>
<tr>
<td><strong>Thought was right thing to do/someone recommended it</strong></td>
<td>7%</td>
</tr>
<tr>
<td>Don’t want a lot of ads</td>
<td>2%</td>
</tr>
</tbody>
</table>

78% Actively chose not to change their settings (24% of all voters) vs. 22% who said: I don’t know how (7% of all voters)

Thinking about social networking and other online accounts that you have, have you ever adjusted the privacy settings on your accounts? What is the main reason why you changed privacy settings on your accounts? What is the reason why you have not changed privacy settings on your accounts?
TO: CCIA
FROM: Danny Franklin and David Kanevsky
RE: Internet Security Poll – Executive Summary
DATE: December 20, 2013

Methodology:
This research was conducted by Benenson Strategy Group and American Viewpoint. The interviews took place from November 12-18, 2013 and included 1,000 interviews with registered voters nationwide who use the Internet. All interviews were conducted over the telephone and included cell phone interviews. The margin of error for the entire data set is ±3.02% at the 95% confidence level.
Contact information: Danny Franklin, Benenson Strategy Group: dfranklin@bsgco.com; 212-702-8777
David Kanevsky, American Viewpoint: david@amview.com; 703-684-3325

Voters are significantly more worried about hacking than tracking by companies

- On average, voters are 5 times more worried about hacking than tracking.
  - 80% say they are more worried the information they share will be hacked to cause harm or steal from them while just 16% are more worried that companies will use the information they share online to target advertising to them.

- Overall, 75% are worried about their personal information being stolen by hackers and 54% are worried about their browsing history being tracked for targeted advertising, but when voters are forced to choose which one is more important to them, even those worried about tracking (the 54%) are more worried about hacking.
  - Indeed, voters’ focus is almost unanimously directed on the need to protect their personal information.

Which is more important to you?

<table>
<thead>
<tr>
<th>Protecting your personal information, such as your Social Security number or financial records, from online hackers</th>
<th>Among Total (100%)</th>
<th>Among those worried about online tracking (54%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Protecting information about your online behavior, such as your online searches and browsing history or emails, from Internet companies who target ads based on that activity</td>
<td>87%</td>
<td>84%</td>
</tr>
<tr>
<td>No difference/ Don’t know</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>Protecting information about your online behavior, such as your online searches and browsing history or emails, from Internet companies who target ads based on that activity</td>
<td>7%</td>
<td>8%</td>
</tr>
</tbody>
</table>
Voters strongly believe the federal government should go after hackers and thieves

- Voters recognize they are vulnerable to security breaches online.
  - 55% say they or someone they know had their email account breached.
  - 62% report receiving a suspicious email from someone likely due to that person's email being hacked.
  - 50% say they or someone they know had their financial accounts breached online.

- This acute awareness of threats to the security of their information has resulted in strong sentiment for the government to take action to protect online security.
  - 74% say the federal government needs to do more to prevent and act against identity theft, including a 56% majority of voters who say they feel strongly about this.
  - Additionally, voters would rather regulators go after hackers who steal consumer data (60%) over investigating the security practices of the company that was hacked (34%).

Voters choose to share information online and take steps to protect themselves

- By choice, most voters actively share information online through a wide range of channels.

<table>
<thead>
<tr>
<th>Top Online Activities, Done Monthly or More</th>
<th>Among Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send personal emails</td>
<td>80%</td>
</tr>
<tr>
<td>Login to a social networking site</td>
<td>70%</td>
</tr>
<tr>
<td>Use online banking</td>
<td>64%</td>
</tr>
<tr>
<td>Make a purchase online with a credit card</td>
<td>56%</td>
</tr>
<tr>
<td>Post a status update on a social networking site</td>
<td>51%</td>
</tr>
<tr>
<td>Allow your location to be used by a mobile app</td>
<td>47%</td>
</tr>
<tr>
<td>Post a photo or video you took to share with friends</td>
<td>40%</td>
</tr>
</tbody>
</table>

- And because they know the risks to their privacy, voters are active in taking steps to protect themselves:
  - 73% have chosen to not allow a service to remember their credit card information
  - 65% have chosen to set their browser to disable cookies
  - 53% have chosen to block an app from accessing their location information

- Overall, most voters have adjusted their privacy settings (68%) and those who haven't are doing it out of choice, not because they don't know how.
  - Only 7% of voters overall say they haven't adjusted their privacy settings because they do not know how to do so.
  - Among the 68% of voters who have adjusted the privacy settings for their online accounts just 2% say they did so because they don't want to see ads (most cite protecting their security or keeping information private from individuals as the reason).

- Ultimately, voters are looking for an Internet that is both free and secure to use.
  - Twice as many say they prefer free online services supported by targeted ads (61%) over online services that they pay for but come with no targeted ads (33%).