

Ipsos Public Affairs

Centre for International Governance Innovation

CIGI-IPSOS GLOBAL SURVEY INTERNET SECURITY & TRUST

2019 PART 4:

PRODUCT SECURITY: INTERNET OF THINGS & OTHER INTERNET-ENABLED DEVICES



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METHODOLOGY & TAKE-AWAYS

METHODOLOGY

- This survey was conducted by Ipsos on behalf of the Centre for International Governance Innovation ("CIGI") between December 21st, 2018 & February 10th, 2019.
 - All online economies were fielded between December 21st, 2018 & January 4th, 2019.
 - Below are the field dates, for the offline economies:
 - Pakistan: Jan 14th Feb 10th
 - Tunisia: Jan 24th 31st
 - Kenya: Jan 28th Feb 7th
 - Nigeria: Jan 25th Feb 7th
- The survey was conducted in 25 economies—Australia, Brazil, Canada, China, Egypt, France, Germany, Great Britain, Hong Kong (China), India, Indonesia, Italy, Japan, Kenya, Mexico, Nigeria, Pakistan, Poland, Russia, South Africa, Republic of Korea, Sweden, Tunisia, Turkey and the United States—and involved 25,229 Internet users. Twenty-one of the economies utilized the Ipsos Internet panel system while four (Kenya, Nigeria, Pakistan & Tunisia) utilized face-to-face interviewing, given online constraints in these economies and the length of the poll.
- The average LOI (length of interview) of the online survey was ~10 minutes. The average LOI for the face-to-face interviews was around 20 minutes, or more.
- In the US and Canada respondents were aged 18-64, and 16-64 in all other economies.
- Since 2018, the economies of Russia and South Africa have been included in the BRICS definition, which previously only included Brazil, India, and China (BIC). For analytical 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 the face-to-face interviews, the margin of error is +/-3.1, 19 times out of 20.

	BRICS =	Brazil, Russia, India, China, South Africa
© 2019 Ipsos	APAC =	Asia Pacific
	LATAM =	Latin America



ECONOMY ABBREVIATIONS

JP

KE

MX

NG

PΚ

PL

KR

RU

ZA

SE

ΤN

TR

US

Total	TL	Japan
Australia	AU	Kenya
Brazil	BR	Mexico
Canada	СА	Nigeria
China	CN	Pakistan
Egypt	EG	Poland
France	FR	Republic of Korea
Germany	DE	Russia
Great Britain	GB	South Africa
Hong Kong (China)	НК	Sweden
India	IN	Tunisia
Indonesia	ID	Turkey
Italy	IT	United States



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FIVE KEY TAKE-AWAYS

Citizens in developing economies tend to be more willing to pay extra for better product security, when purchasing Internet-enabled devices. Those in developed economies likely expect strong security in the first place.

Global citizens are willing to pay about 30% more, for better product security, a figure which is consistent across all Internet-enabled devices, regardless of type. Three in ten won't pay anything else.

Security, functionality & price continue to be the top factors influencing the purchasing decision for applications & connected devices.

Relatively speaking, price has a greater impact on the purchasing decision in more developed economies, such as Europe & North America.

Security tends to hold more sway over the purchasing decision in developing economies, such as LATAM & BRICS, which explains why they're willing to pay a higher premium to get it.

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A PREMIUM FOR SECURITY

WILLINGNESS TO PAY PREMIUM FOR BETTER PRODUCT SECURITY ON INTERNET-ENABLED DEVICES

Clearly there is very little variation in the premium consumers are willing to pay for better product security – regardless of the product itself or its pricing, ranging from from 28.1% to 29.9%. The following data also reveal that roughly three in ten aren't willing to pay anything more – higher in developed economies.



Avg Premium Willing to Pay (in %)

© 2019 lpsos Q10. When buying Internet-enabled devices, how much more are you willing to pay for better product security? Base: 2019 (n=21203) NOT ASKED IN KENYA, NIGERIA, PAKISTAN & TUNISIA

CAR WITH SELF-DRIVING FUNCTIONS (VALUED AT \$50,000)

When it comes to self-driving cars (valued at \$50k), global citizens are willing to pay, on average, 30% more for (incl o) better product security, ranging from a high of 47% in China to a low of 14% in Japan.

Total	29%			26%		18%		14%		12%	29.9
China	8%	22%		21%		26%			23%		47.4
India	11%	23%		23%			23%		20%	/ 0	44.6
South A fri ca	15%	259	%	2	21%		17%		21%		41.3
Egypt	11%	27%		24	4%		21%		1	7%	41.2
Brazil	16%	22%	, D	22%	6		25%			16%	40.8
Turkey	15%		28%		21%		17%		18%	/ 0	38.5
Mexico	12%	32	.%		23%		17%	0		16%	38.0
South Korea	20%		25%		24%			20%		11%	34.7
Indonesia	27%			26%		20%		16%		10%	30.1
Australia	34%			28%			15%	13%		11%	27.9
United States	42%				21%		13%	11%		13%	26.3
Russia	35%			29	%		16%	9%	6	11%	25.2
Poland	34%			29%			17%	1	.1%	9%	24.
Italy	36%			26%	6		19%		11%	8%	24.6
Sweden	40%				23%		16%	11	%	10%	24.3
Great Britain	38%				26%		15%	12	2%	9%	24.2
long Kong (China)	37%			25	%		18%		13%	6%	23.3
Canada	41%				28%		149	%	8%	9%	21.9
France	45%				289	%		11%	9%	7%	19.3
Germany	50%					27%		12%		8% 49	<mark>%</mark> 15.8
Japan					-	33%		16	5%	6% 1	1% 14.4

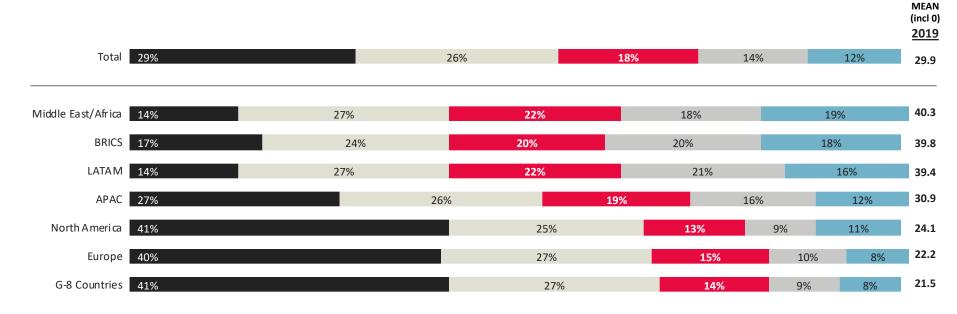
■ 0% ■ 1-25% **■** 26%-50% ■ 51%-75% **■** 76%-100%

© 2019 Ipsos Q10. When buying Internet-enabled devices, how much more are you willing to pay for better product security? Base: 2019 (n=21203) NOT ASKED IN KENYA,NIGERIA,PAKISTAN & TUNISIA MEAN

29 Q

CAR WITH SELF-DRIVING FUNCTIONS (VALUED AT \$50,000)

On balance, citizens in developing economies are willing to pay significantly more for better product security when it comes to self-driving cars (valued at \$50k). Three in ten (29%) aren't willing to pay anything more.



■ 0% ■ 1-25% **■** 26%-50% ■ 51%-75% **■** 76%-100%

© 2019 Ipsos Q10. When buying Internet-enabled devices, how much more are you willing to pay for better product security? Base: 2019 (n=21203) NOT ASKED IN KENYA,NIGERIA,PAKISTAN & TUNISIA

CAR WITH SELF-DRIVING FUNCTIONS (VALUED AT \$60,000)

Similarly, the average global citizen is willing to spend nearly 30% extra for better product security on cars with self-(inclo) driving functions (valued at \$60k), with highs of 46% in China and lows of 14% in Japan.

China 9% India 129	% 22%								
India 129			21%		27%		219	%	46.0
	2% 23%		2	.5%	21%		1	.9%	42.9
Brazil 169	5%	24%		20%	24	1%		16%	39.5
South Africa 179	1%	26%		21%		18%		18%	39.1
Mexico 129	2%	33%		21%		18%		16%	38.0
Turkey 179	1%	29%		20%		17%		17%	37.9
Egypt 129	2%	34%		21%		18%		16%	37.7
South Korea 219	1%	26%		26%			20%	8%	32.1
Indonesia 289	3%		28%		20%		13%	10%	28.9
Australia 359	5%			27%	16%		12%	10%	26.3
Sweden 409	0%			22%	16%		12%	11%	25.4
United States 429	2%			23%	12%	6	9%	13%	25.3
Poland 349	4%			30%	15	%	13%	8%	24.9
Great Britain 409	0%			26%		14%	11%	9%	24.0
Italy 369	5%			26%	20)%	11%	7%	23.7
Russia 399	9%			30%		13%	8%	11%	23.4
Hong Kong (China) 379	7%			28%	1	5%	15%	5%	22.7
Canada 459	5%			26%		12%	9%	8%	20.3
France 479	7%			27%)	12	2% 6%	8%	18.5
Germany 519	1%				26%		12%	7% 4%	15.5
Japan 459				33			14%	6% 1%	14.4

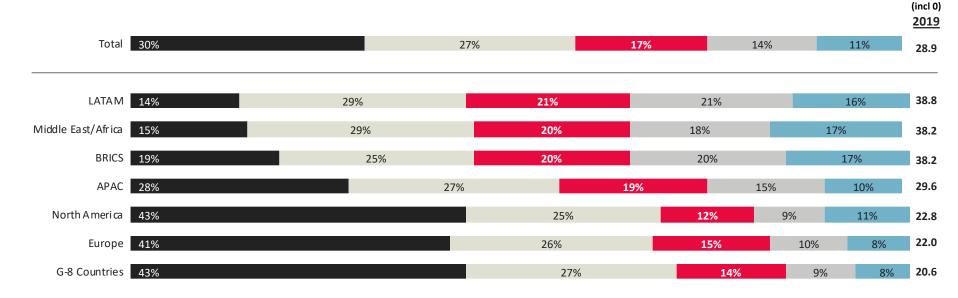
■ 0% ■ 1-25% **■** 26%-50% ■ 51%-75% **■** 76%-100%

© 2019 Ipsos Q10. When buying Internet-enabled devices, how much more are you willing to pay for better product security? Base: 2019 (n=21203) NOT ASKED IN KENYA, NIGERIA, PAKISTAN & TUNISIA MEAN

20 0

CAR WITH SELF-DRIVING FUNCTIONS (VALUED AT \$60,000)

Once again, citizens in developing economies such as LATAM, BRICS, and the Middle East & Africa are willing to pay a premium of twice as much, compared to those in North America, Europe & the G-8, for better product security for cars with self-driving functions (valued at \$60k). Three in ten (30%) aren't willing to pay anything more.



■ 0% ■ 1-25% **■** 26%-50% ■ 51%-75% **■** 76%-100%

© 2019 Ipsos Q10. When buying Internet-enabled devices, how much more are you willing to pay for better product security? Base: 2019 (n=21203) NOT ASKED IN KENYA,NIGERIA,PAKISTAN & TUNISIA MEAN

INTERNET OF THINGS DEVICE (VALUED AT \$1,400)

In terms of Internet of things devices (valued at \$1,400), global citizens are willing to pay just under 30% more for (inclo) better product security, on average, with highs of 45% in India & China and a low of 14% in Japan.

Total	27%		30%		20%		15%	9%	28.
India	8%	24%	23%		26%		19%	6	45.
China	8%	22%	23%		29%		17%	6	44.
Egypt	8%	29%		25%	2	1%	1	7%	41.
	15%	24%		24%		24%		14%	39.
South A fri ca	12%	28%		26%		20%		13%	38.
Mexico		32%		24%		19%		15%	38.
Turkey		30%		27%		19%		10%	34.
Indonesia	24%		31%		21%		15%	9%	29.
South Korea			32%		23%		19%	5%	29
Australia	29%		29%		18%		17%	7%	27
United States			28%		16%	1	13%	10%	26
Great Britain			3	80%	18	3%	12%	8%	24
Poland			33%		19%		15%	5%	24
ong Kong (China)	29%		32%		22	2%	14%	3%	23
	37%			32%		14%	10%	7%	22
Sweden	42%			25%		14%	12%	6%	21
Italy	35%			33%		16%	10%	6%	21
Canada	38%			31%		15%	9%	7%	21
France	45%			29%		12%	9%	5%	17
Germany	43%			34%)		13%	7% 3%	16
Japan	43%			34%)		18%	5%	14

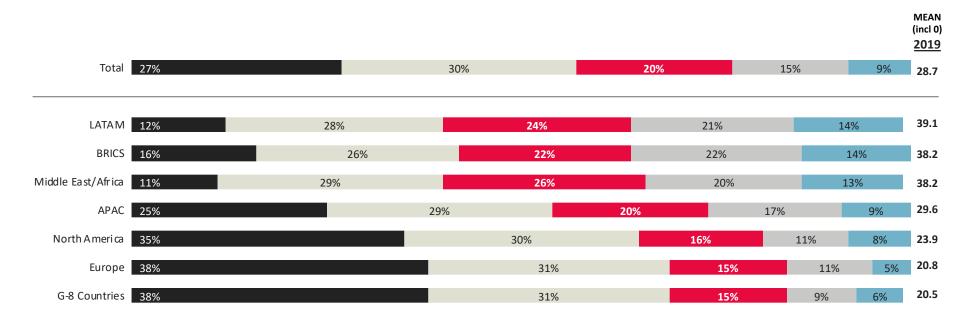
■ 0% ■ 1-25% **■** 26%-50% ■ 51%-75% **■** 76%-100%

© 2019 Ipsos Q10. When buying Internet-enabled devices, how much more are you willing to pay for better product security? Base: 2019 (n=21203) NOT ASKED IN KENYA,NIGERIA,PAKISTAN & TUNISIA MEAN

28 7

INTERNET OF THINGS DEVICE (VALUED AT \$1,400)

Citizens in developing economies continue to express a willingness to pay about twice as much for better product security, compared to those in more developed economies. Three in ten (27%) aren't willing to pay anything more.



■ 0% ■ 1-25% **■** 26%-50% ■ 51%-75% **■** 76%-100%

© 2019 Ipsos Q10. When buying Internet-enabled devices, how much more are you willing to pay for better product security? Base: 2019 (n=21203) NOT ASKED IN KENYA,NIGERIA,PAKISTAN & TUNISIA

INTERNET OF THINGS DEVICE (VALUED AT \$1,000)

Once again, global citizens are willing to pay an average of ~30% more for better product security, ranging from a (incl o) high of 48% in India to a low of 15% in Japan.

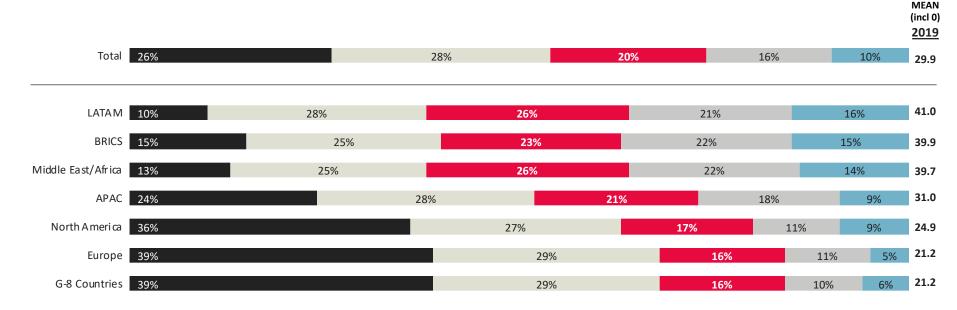
0		1						
Total	26%		28%		20%		16%	10%
India	8%	22%	24	%	26%			21%
China	8%	23%	219	6	29%			19%
Egypt	8%	30%		25%		20%		17%
South A fri ca	10%	27%		28%		21%		15%
Brazil		22%		26%		24%		14%
Turkey	13%	27%		24%		22%		15%
Mexico		28%		27%		20%		13%
Indonesia	21%		29%		23%		18%	9%
South Korea	20%		31%		25%		18%	6%
Australia				28%	19%		15%	8%
United States				26%	18%		11%	10%
ng Kong (China)				29%	239	%	159	
Great Britain				28%		18%	12%	8%
Poland				35%		19%	139	
Canada				28%		15%	10%	8%
	35%			32%		16%	119	% 7%
Sweden				24%		17%	11%	7%
	38%			29%		17%		12% 5%
Germany				31%		1	16%	9% 3%
France					27%		11%	10% 4%
Japan	43%				34%		15%	7% 1%

■ 0% ■ 1-25% **■** 26%-50% ■ 51%-75% **■** 76%-100%

© 2019 Ipsos Q10. When buying Internet-enabled devices, how much more are you willing to pay for better product security? Base: 2019 (n=21203) NOT ASKED IN KENYA,NIGERIA,PAKISTAN & TUNISIA MEAN

INTERNET OF THINGS DEVICE (VALUED AT \$1,000)

Consistent with other metrics, citizens in developing economies are willing to pay nearly twice as much for better product security on Internet of things devices (valued \$1k) compared to those in the developed world. One quarter (26%) aren't willing to pay anything more.



■ 0% ■ 1-25% **■** 26%-50% ■ 51%-75% **■** 76%-100%

© 2019 Ipsos Q10. When buying Internet-enabled devices, how much more are you willing to pay for better product security? Base: 2019 (n= 21203) NOT ASKED IN KENYA, NIGERIA, PAKISTAN & TUNISIA

WEARABLE FITNESS TRACKER (VALUED AT \$100)

Despite the lower value, relative to other Internet-enabled devices, global citizens are will to pay around 30% more, on average, for better product security with highs of 45% in China & India and a low of 15% in Germany. 2019

Total	28%		28%		19%		15%	10%	25.1
China	10%	22%	22%		27%		20	%	45.4
India	9%	24%		4%		1%	20		45.2
Brazil	13%	23%		25%		23%		17%	41.6
Egypt	10%	29%		23%		22%	1	5%	40.4
South A fri ca	14%	28%		22%		18%	18	8%	39.8
Mexico	12%	35%		22%	5	17%		15%	36.8
Turkey	20%		27%	21%		16%	1	L6%	35.2
long Kong (China)	28%		26%		18%		20%	8%	29.5
South Korea	22%		31%		23%		17%	6%	29.2
Indonesia			33%		18%		16%	9%	28.
United States	35%			25%	15%	12	2%	12%	27.
Australia	36%			25%		19%	14%	7%	25.
Sweden	39%			24%		18%	11%	9%	24.
Italy	34%			30%		17%	14%	5%	23.
Poland	34%			31%		18%	11%	6%	22.
Great Britain	39%			27%		15%	13%	6%	22.
Canada	40%			29%		13%	10%	8%	22.6
Russia	36%			32%		17%	8%	6%	21.0
Japan	41%			32%		16	5%	8% 3%	17.7
France	47%				27%	139	% 9	9% 4%	17.6
Germany	52%				26%		13%	6% 3%	14.5

■ 0% 1-25% **2**6%-50% 51%-75% 76%-100%

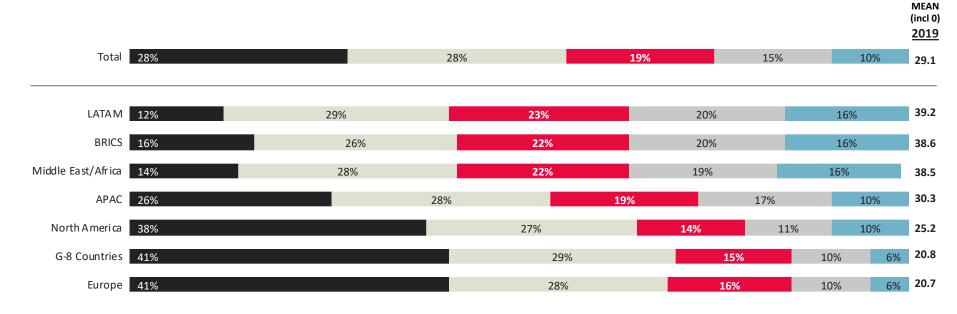
Q10. When buying Internet-enabled devices, how much more are you willing to pay for better product security? © 2019 lpsos Base: 2019 (n=21203) NOT ASKED IN KENYA, NIGERIA, PAKISTAN & TUNISIA

MEAN (incl 0)

29.1

WEARABLE FITNESS TRACKER (VALUED AT \$100)

Similar trends prevail when it comes to wearable fitness trackers (valued at \$100), with less developed economies willing to pay nearly twice as much for better product security, on average. Three in ten (28%) aren't willing to pay anything more.



■ 0% ■ 1-25% **■** 26%-50% ■ 51%-75% **■** 76%-100%

© 2019 Ipsos Q10. When buying Internet-enabled devices, how much more are you willing to pay for better product security? Base: 2019 (n= 21203) NOT ASKED IN KENYA,NIGERIA,PAKISTAN & TUNISIA

WEARABLE FITNESS TRACKER (VALUED AT \$130)

Overall, global citizens are willing to pay 28% more, on average, for better product security with a high of 45% in (inclo) India and a low of 15% in Germany. 2019

Total	29%		29%		19%	14%	10%	28
India	10%	23%	25%	6	20%	21	%	44
China	10%	22%	24%		23%	20	0%	44
Brazil	16%	22%		25%	22%		15%	39
	11%	31%		23%	19%		15%	38
South A fri ca	14%	29%		22%	18%		16%	38
Mexico	12%	33%		24%		18%	13%	3
Turkey	18%		29%	24%		15%	13%	34
South Korea	22%		31%		24%	17%	5%	28
Indonesia	26%		33%		20%	14%	7%	2
ong Kong (China)	30%		29%		19%	16%	7%	2
United States	35%			28%	15%	11%	12%	2
Australia	36%			27%	16%	11%	10%	2
Sweden	40%			24%	17%	10%	8%	2
Great Britain	39%			28%	15%	11%	6%	:
Italy	36%			29%	17%	11%	6%	2
Poland	31%			36%	16%	11	% 5%	2
Canada	43%			27%	12%	6 10%	8%	2
Russia	38%			32%	14	4% 9%	% 7%	
France	48%			27%		11%	9% 5%	1
Japan	41%			34%		17%	7% 19	<mark>%</mark> 1
Germany	52%				27%	11%	6% 4%	1

■ 0% ■ 1-25% **■** 26%-50% ■ 51%-75% **■** 76%-100%

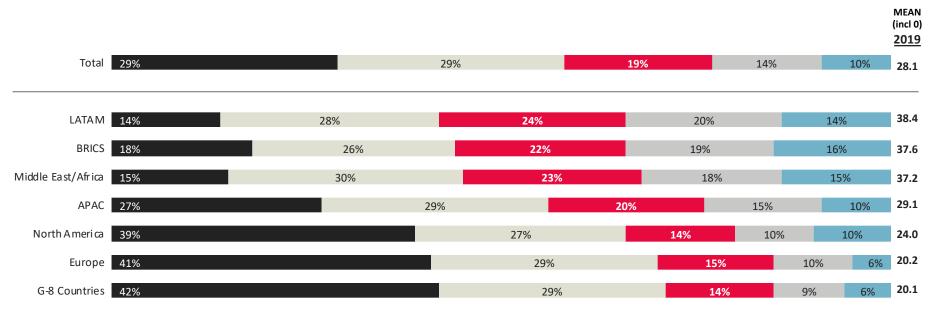
© 2019 lpsos Q10. When buying Internet-enabled devices, how much more are you willing to pay for better product security? Base: 2019 (n=21203) NOT ASKED IN KENYA, NIGERIA, PAKISTAN & TUNISIA

MEAN

28.1

WEARABLE FITNESS TRACKER (VALUED AT \$130)

There is a greater appetite to pay more for better product security on wearable fitness trackers (valued at \$130) in developing markets such as LATAM, BRICS, the Middle East & Africa. Three in ten (29%) aren't willing to pay anything more.



■ 0% ■ 1-25% **■** 26%-50% ■ 51%-75% **■** 76%-100%

© 2019 Ipsos Q10. When buying Internet-enabled devices, how much more are you willing to pay for better product security? Base: 2019 (n= 21203) NOT ASKED IN KENYA,NIGERIA,PAKISTAN & TUNISIA

FACTORS INFLUENCING BUYING BEHAVIOUR



Overall, security ranks as the top factor influencing the decision to buy an application or connected device, followed closely by price & functionality.

2019 2018 Security 26% 3.2 3.0 19% 15% 11% 10% 5% 3.4 3.3 Price 24% 17% 13% 12% 10% 9% 3.4 3.3 Functionality 20% 6% 18% 15% 13% 10% Ease of Use 3.8 3.8 10% 17% 18% 16% 13% 8% 4.3 4.1 Privacy Policy 9% 14% 12% 13% 16% 17% 17% **Brand Reputation** 7% 9% 12% 4.7 4.4 14% 16% 20% 21% Appearance 3% 6% 12% 20% 34% 16% 5.3 5.1 Rank 1 Rank 2 Rank 3 Rank 4 Rank 5 Rank 6 Rank 7

© 2019 Ipsos Q11. When buying an application or Internet-connected device, please rank the following attributes of importance in influencing your decision to buy: Base: All Respondents 2018 (n=24359); 2019 (n=21203) NOT ASKED IN KENYA, NIGERIA, PAKISTAN & TUNISIA 0505

AVERAGE RANK (lower = more important)

Factors Influencing Purchase Decision - % Ranked 1st by Regional Economy

Those living in developed economies, such as North America, Europe & the G-8, tend to place a greater emphasis on price, when buying applications or Internet-connected devices. Conversely, security ranks higher among those living in developing economies such as LATAM, BRICS, the Middle East & Africa.

					REGIONS			
	Total	North America	LATAM	Europe	APAC	G-8 Countries	BRICS	Middle East/Africa
Base: All Respondents	n=21203	n=2001	n=2176	n=6009	n=8011	n=8009	n=5169	n=3006
Security	26%	22%	30%	23%	27%	22%	28%	27%
Price	24%	33%	21%	27%	23%	30%	19%	19%
Functionality	20%	20%	18%	22%	20%	21%	21%	19%
Ease of Use	10%	9%	8%	12%	11%	11%	10%	7%
Privacy Policy	9%	6%	11%	8%	9%	7%	10%	12%
Brand Reputation	7%	8%	8%	5%	7%	6%	9%	11%
Appearance	3%	2%	4%	3%	3%	3%	3%	5%

SECURITY

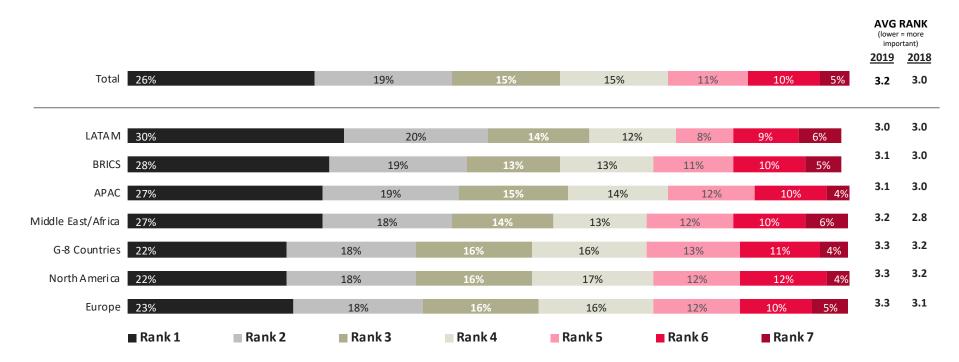
Security rankings are highest in Indonesia and lowest in France & Australia. The French, Italians, Turks & Chinese are particularly less likely to view security as being important, compared to 2018.

													(lower = more	e important)
- · · · •	0.60/		100/		4 = 0 (4 = 0 (0.01	=0(2019	2018
Total	26%		19%		15%		15%		11%		.0%	5%	3.2	3.0
Indo nesia		34%	_	20%		15	%	129	6	9%	8%	2%	2.7	2.7
Mexico	32	2%		21%		169	%	11%		8%	8%	4%	2.8	3.0
Hong Kong(China)	309	%		20%		15%		12%	11	%	8%	3%	2.9	2.7
India		34%		17%		13%	1	1%	10%	10	%	3%	2.9	2.9
China	33	2%		20%		15%		11%	1)%	8%	5%	2.9	2.5
Poland	29%	,)	2	0%		16%		13%	99	%	9%	4%	3.0	2.9
Canada	23%		19%		18%		16%	0	11%		10%	3%	3.1	3.3
Egypt	28%		18%		13%		14%		12%	9%	0	6%	3.1	3.2
J ap an	25%		20%		15%		14%		14%		9%	3%	3.1	3.2
Germany	21%		22%		19%		1	L6%	1	.1%	8%	3%	3.1	2.9
Brazil	28%		19%	6	12%		14%		7%	11%	9%	6	3.2	3.1
Sweden	25%		17%		15%		17%		11%	9%	0	6%	3.2	3.1
Turkey	309	%	16	%	14%		12%		12%	10%		6%	3.2	2.9
Republic of Korea	22%		19%		14%		17%		10%	12%		6%	3.3	3.3
Great Britain	21%		18%	1	6%		18%		12%	1	1%	4%	3.3	3.4
South Africa	24%		20%		13%		12%	13	%	11%	6	%	3.3	3.2
Italy	22%		15%	15%		16%		12%		10%	8%		3.4	3.0
United States	21%		17%	14%		17%	/ D	129	6	14%		4%	3.4	3.2
Russia	22%		18%	14	4%	1	6%		16%		11%	4%	3.4	3.3
France	20%		17%	13%		16%		14%		15%		5%	3.5	3.2
Australia	16%	17%		17%		17%		169	6	139	%	4%	3.5	3.5
	Rank 1	Rank 2	Rank 3		Rank 4	E F	Rank 5		Rank 6		Rank 7			

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SECURITY

Mean rankings vary little by region, though there is a little more importance placed on security among those in developing economies.



0509

FUNCTIONALITY

In terms of functionality, importance rankings are highest in Sweden & Russia and lowest in India. There has been a notable jump in mean score rank among Hong Kong (China) residents over the past year.

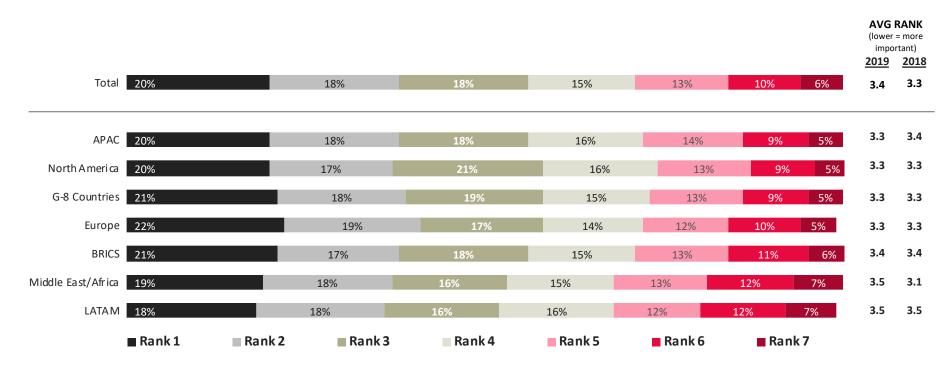
Total	20%	18%		18%		15%		13%		10%	6%	3.4	3.3
Sweden	25%		21%		17%		15%		9%	8%	5%	3.1	3.2
Russia	28%		18%		18%		11%	1	2%	9%	5%	3.1	3.0
Hong Kong(China)	20%	199	6	19%		1	7%	1	2%	9%	4%	3.2	3.5
United States	21%	18	%	22%	,)		15%		13%	89	6 4%	3.2	3.3
Australia	26%		17%	159	%	16	5%	1	4%	8%	4%	3.2	3.3
China	23%		19%	19	9%		14%		14%	7%	5%	3.2	3.3
Germany	25%		18%	1	7%	1	L4%	13	3%	8%	5%	3.2	3.3
Great Britain	23%		21%		18%		15%		11%	9%	4%	3.2	3.1
Italy	22%		19%	16%		15%		12%		10%	6%	3.3	3.4
France	18%	19%		18%		13%		15%		12%	5%	3.4	3.5
Poland	20%	17%		17%		15%		13%	1	12%	6%	3.4	3.4
Canada	18%	17%		20%		17%		12%		10%	6%	3.4	3.3
South Africa	21%	179	%	15%		16%		13%		13%	5%	3.4	3.5
Mexico	20%	199	%	15%		17%		12%		12%	5%	3.4	3.4
Indo nesia	18%	20%		18%		16%		13%		10%	6%	3.4	3.4
J ap an	15%	16%		21%		17%		17%		9%	5%	3.5	3.5
Republic of Korea	17%	18%		19%		16%		15%		10%	6%	3.5	3.3
Turkey	15%	20%		16%	13%	6	14%		12%		9%	3.6	3.8
Brazil	17%	17%		18%		15%	1	3%	139	%	8%	3.6	3.6
Egypt	20%	15%		15%	17	7%	12	2%	13%		8%	3.6	3.5
India	14%	16%	18	%	18%	,)	13	%	12%		9%	3.7	3.8
	Rank 1	Rank 2	Rank 3	Rank	4	Rank 5	5	Rank	5	Ran	k 7		

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2018

FUNCTIONALITY

On balance, functionality importance scores are down somewhat over the past year, with most of the drop occurring in the Middle Eastern & African economies.



PRICE

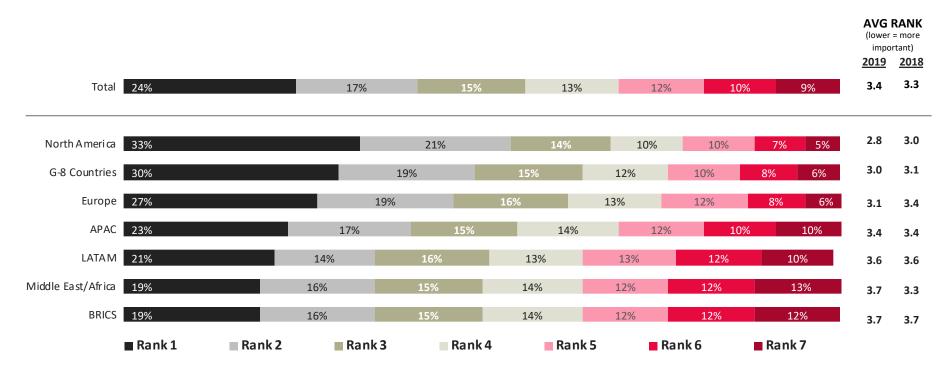
Average importance rankings for price range from a high of 2.8 in Canada & France to a low of 4.5 in China.

											(lower = impor	= more
											2019	2018
Total	24%		17%	15%		13%	12%	1)%	9%	3.4	3.3
Canada		33%		20%		14%	10%	11%	6%	5%	2.8	3.0
France		36%		18%		15%	12%	99	% 5%	6 5%	2.8	3.0
Great Britain	3	1%		20%	14	%	12%	11%	6%	6%	2.9	3.0
J ap an		32%	16	5%	18%	6	11%	11%	7%	4%	2.9	2.9
United States		33%		21%		14%	11%	8%	7%	6%	2.9	3.0
Italy	28%	/ D	21%		179	%	10%	9%	9%	6%	3.0	3.4
Australia	30)%	20)%	13%		14%	9%	7%	6%	3.0	2.9
Russia	28%	/ D	20%		16%		12%	9%	10%	6%	3.1	3.0
Sweden	23%		19%		19%		14%	12%	8%	6%	3.2	3.5
Republic of Korea	26%		18%		17%		14%	11%	8%	7%	3.2	2.9
Hong Kong(China)	27%		18%		16%	1	.3%	11%	9%	6%	3.2	3.3
Germany	19%	1	8%	16%		16%	1	6%	9%	7%	3.4	3.6
Poland	23%		17%	15%		14%	14	%	9%	8%	3.4	3.7
Brazil	24%		16%	17%		14%	11	.%	11%	7%	3.4	3.6
Turkey	21%		18%	13%		16%	10%	11%		11%	3.5	3.8
South Africa	23%		14%	15%	1	14%	12%	12%		11%	3.6	3.6
Indo nesia	19%	169	%	14%	15%		12%	12%	1	12%	3.7	3.9
India	15%	17%	13%		15%	1	.5%	11%	13	%	3.9	4.1
Mexico	18%	13%	15%		13%	10	5%	13%		13%	3.9	3.7
Egypt	11%	14%	16%	13%		14%	13%		17%		4.1	3.8
China	7% 12%	14%	14	1%	15%		16%		22%		4.5	4.3
	Rank 1	Rank 2	Rank 3	Ran	k 4	Rank 5	R	ank 6	Ran	k 7		n

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PRICE

Since 2018, average importance ratings for price have dropped considerably in the Middle East & Africa, while increasing in Europe, North America & the G-8 more generally over the same period.



EASE OF USE

Ease of use importance rankings are highest in the Republic of Korea & Japan, lowest in Turkey, on average.

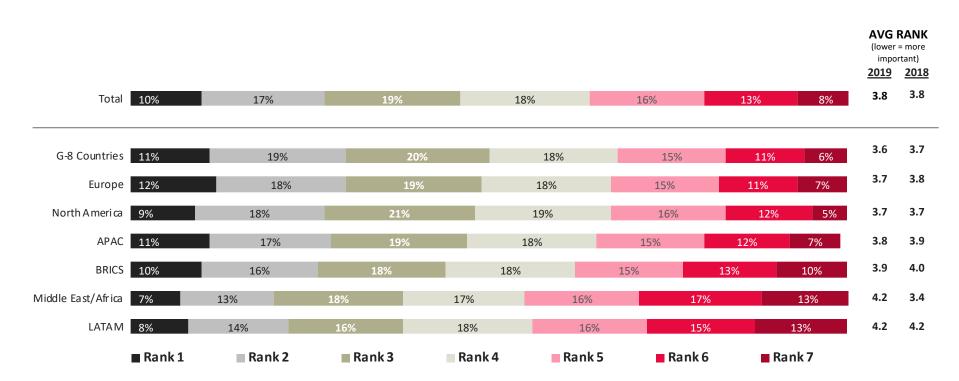
AVG RANK (lower = more important)

Tatal	100/	470/		••		100(1.001		100/	00/	<u>2019</u>	<u>2018</u>
Total	10%	17%	1	.9%		18%		16%		13%	8%	3.8	3.8
Japan	13%	21%		20%			18%		13%	10%	4%	3.4	3.4
Republic of Korea	15%	2:	1%	20%			15%		14%	10%	5%	3.4	3.9
Sweden	14%	19%		20%		17	17%		4%	10%	5%	3.5	3.7
Russia	12%	20%		23%		18%			13%	9%	5%	3.5	4.0
France	13%	19%		19%		17%	17% 1			12%	7%	3.6	3.7
Germany	11%	18%		22%		19%	19%		17%	8%	5%	3.6	3.7
Great Britain	11%	19%		22%	2% 19%		9%	14%		10%	5%	3.6	3.5
Australia	12%	21%		20%	20% 16		%	14%		11%	6%	3.6	3.6
United States	8%	18%		22%	18%			16%	16%		5%	3.7	3.7
Canada	9%	18%		21%		20%	20%		6%	11%	5%	3.7	3.7
Indonesia	11%	15%	2(20%		18%		16%		13%	8%	3.8	3.8
Italy	13%	16%		16%		18%		15%	13	3%	10%	3.9	4.0
China	8%	14%	18%		20%		16	%	14%		10%	4.0	4.0
Brazil	9%	15%	17%	199			14%		16%		10%	4.0	4.1
India	11%	14%	17%		17%		16%		13%	1	1%	4.0	3.9
Poland	9%	14%	15%		18%		19%		13%		1%	4.1	4.1
South A fri ca	8%	16%	17%		16%		16%		15%	1	.2%	4.1	3.9
Egypt	10%	12%	17%		18%		14%		15%	14	14%	4.2	4.3
Hong Kong	4% 12%	16%		18%		21%	0		17%	1:	1%	4.3	4.4
Mexico	7%	13%	15%	17%		17%	0	14	%	15%		4.3	4.3
Turkey	5% 11%	19	9%	16%		17%			20%		13%	4.4	4.1
	Rank 1	Rank 2	Ran	k 3	Rank 4		Rank 5	= I	Rank 6	Ran	k 7		

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EASE OF USE

Ease of use rankings have dropped significantly in the Middle East & Africa, over the past year.



PRIVACY POLICY

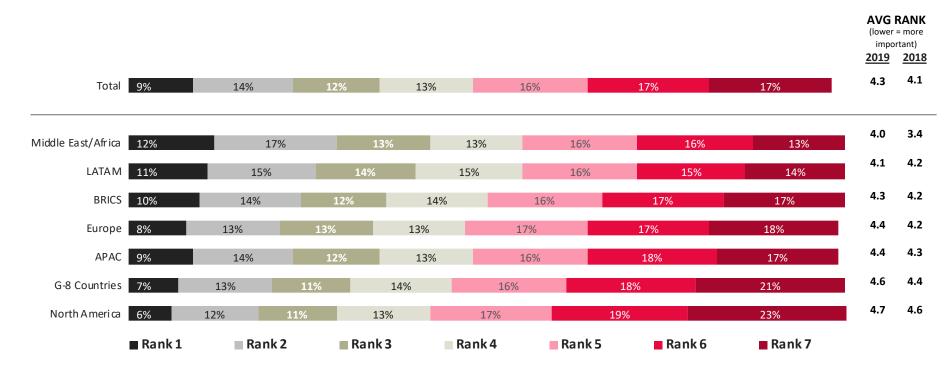
When it comes to buying an application or Internet-connected device, global citizens rank privacy policy a little lower on the importance scale, with Italy, France & Russia registering sizeable year-over-year drops.

Total	00/	1.40/		120/	120/	10	0/	17%		170/	<u>2019</u>	2018
10181	9%	14%		12%	13%	10.	16% 17			17%	4.3	4.1
Germany	17%		18%	6	13%	1	8%	18	3%	10% 6%	3.6	3.4
Mexico	13%		18%	1	6%	15%		13%		11%	3.9	3.8
Turkey	14%		18%	119	6	13%	15%		15%	14%	4.0	4.1
India	13%		17%	13%		13%	15%		15%	14%	4.0	4.0
Poland	11%	1	.6%	17%		13% 15		17%		11%	4.0	3.7
Egypt	12%		17%	13%		13%	16%		18%	11%	4.0	4.1
China	11%		17%	13%	13	3%	15%		19%	12%	4.1	4.0
South Africa	11%	1	5%	15%	13	3%	15%		16%	14%	4.1	4.1
J ap an	10%	1	7%	11%	15%		16%		19%	13%	4.2	4.3
Republic of Korea	12%		15%	13%	12%		18%		16%	14%	4.2	4.2
Indo nesia	11%	1	5%	13%	14%	,)	17%		16%	15%	4.2	4.2
Hong Kong(China)	10%	159	%	11%	11%	13%		19%		20%	4.4	4.3
Brazil	9%	12%	11	%	16%		19%	15	%	18%	4.4	4.5
Sweden	6%	12%	11%	14%		21%		21	%	15%	4.6	4.4
Canada	6%	12%	9%	15%		17%		20%		20%	4.7	4.5
Italy	7%	13%	11%	9%	1	5%	21%	21%		24%	4.7	4.2
United States	6%	12%	12%	10%		17%	18	%		25%	4.8	4.7
France	5% 10	%	11%	15%		15%	16%		2	7%	4.8	4.4
Australia	5% 10	%	12%	12%	16	%	20%			24%	4.8	4.9
Great Britain	5% 9%	,)	11%	12%	18%		18%			27%	4.9	4.8
Russia	1/0 10/0	1	.0%	14%	16%		20%			27%	5.0	4.6
	Rank 1		Rank 2	🔳 Rank 3	F	Rank 4	📕 Rank 5	5 🗧	Rank 6	Rank 7	_	

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PRIVACY POLICY

In each region, mean scores have decreased over the past year, with the Middle Eastern & African economies registering the greatest declines, year over year.



BRAND REPUTATION

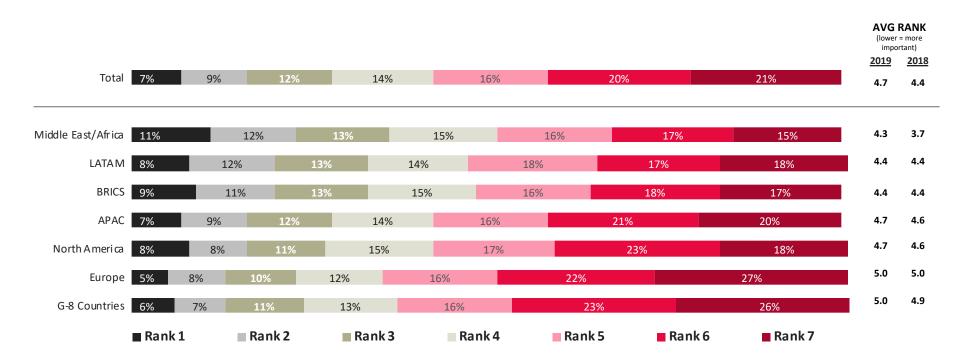
Few (7%) rank brand reputation as the most important factor influencing their decision to buy applications or Internet-connected devices.

Total	70/	00/	4 30/	1.40/		4.00/	200/		240/	<u>2019</u>	<u>2018</u>
Total	7%	9%	12%	14%		16%	20%		21%	4.7	4.4
Egypt	14%		15%	16%	6	13%	14%	17%	11%		
China	15%		12%	13%		16%	17%	16%	11%	3.9	4.1
Turkey	9%	12%		3%	17%	10/0	18%	17%	15%	4.0	4.3
Brazil	9%	14%		14%	14%		18%	16%	15%	4.3	4.3
Hong Kong.		11%	14%	14/0	18%		17%	20%	13%	4.3	4.2
India	8%	13%		15%	15%		16%	17%	17%	4.4	4.2
Australia	9%	10%	13%		13%	16%	1078	20%	18%	4.4	4.2
Mexico	7%	9%	13%	15%	· · · · · ·	10%		18%	20%	4.5	4.5
United States	8%	8%	10%	13%		19%	-	21%	18%	4.6	4.6
South A frica		_			F0/					4.6	4.6
	9%	10%	12%		5%	15%		19%	20%	4.6	4.6
France	6%	11%	13%	12%		17%	17%	0(25%	4.7	4.9
Canada	8%	9%	11%	12%		17%	25	5%	18%	4.7	4.6
Italy		9%	14%	16%		18%		20%	19%	4.7	4.8
Great Britain	7%	8%	11%	13%	1	5%	22%		24%	4.8	4.8
Indonesia	5%	9%	12%	14%		18%	21%	0	21%	4.8	4.6
Russia	5% 7'	% 11	L%	13%	17%		24%		23%	4.9	4.9
Poland	5% 8	3% 89	6 1	L4%	17%		21%		27%	5.0	5.0
Sweden	5% 7	% 10	% 1	L2%	19%		24%		23%	5.0	4.8
Republic of Korea	5% 6%	6 9%	12%	0	16%		24%		27%	5.1	4.9
Japan	3% 5%	8%	11%	15%		26%		33	3%	5.4	5.3
Germany	3% 3%	6%	11%		26%			45%		5.8	5.7
	Rank 1	L	Rank 2	Rank 3		Rank 4	Rank 5	Rank 6	Rank 7		

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BRAND REPUTATION

Mean scores are down, year over year, across all regions.



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APPEARANCE

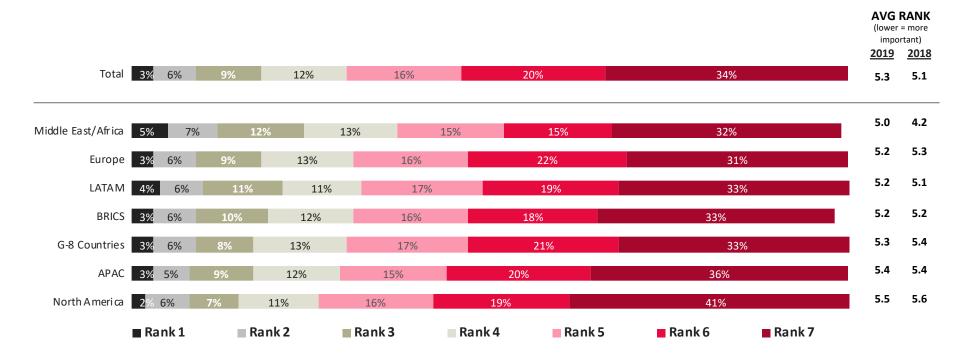
On average, appearance ranks the lowest out of all attributes surveyed (mean score: 5.3). In fact, just three percent (3%) of global citizens rank this as the *most important* factor influencing their decision to buy applications or Internet-connected devices.

						/	_					<u>2019</u>	<u>2018</u>
Total	3%	6%	9%	129	6	16%	16% 20%			34%		5.3	5.1
South Africa	3%	7%	12%		15%		15%	15%		32%		5.0	5.2
Italy		8%	10		17%		18%	16%		28%		5.0	5.2
Turkey				4%	13%		14%			32%		5.0	5.2
Brazil			119	6	9%	18%		16% 18%		33%		5.1	5.0
France	3%	5%	11%		14%		3%	23%		26%		5.1	5.2
Russia		7%	9%		16%		18%			29%		5.1	5.2
Poland		7%	119		12%	13%		19%		33%		5.1	5.3
Egypt	4%	8%	10	%	12%		.7%	15%		33%		5.1	5.1
India		6%	11%		10%	15%		21%		33%		5.2	5.1
Mexico	3%	6%	11%		12%	15%		20%		32%		5.2	5.2
Great Britain	3%	5%	8%	12%		19%	24%			29%		5.3	5.4
Sweden	3%	5%	8%	11%	1	.4%	209	20%		39%		5.4	5.4
Indo nesia	2%	6%	9%	11%		15%		20%		38%		5.4	5.5
Germany	3% 3	3% 85	%	12%	14	%		30%		29%		5.4	5.5
China	3%	6%	8%	12%		14%	21%			36%		5.4	5.6
Republic of Korea	3%	4%	8%	13%		17%		20%		35%		5.4	5.5
Hong Kong(China)	2% 5	5%	8%	11%	14	%	17%			43%		5.5	5.7
Australia			9%	11%	15	5%	21	21%		38%		5.5	5.4
J ap an	3%	4% 7	1%	13%	1	.4%	209	20%		39%		5.5	5.6
United States	2%	6%	7%	11%		17%		20%		38%		5.5	5.5
Canada	2% 5	5% 69	% 1	0%	15%		18%			43%		5.6	5.7
	E F	Rank 1		Rank 2	R	ank 3	Rank	4 e f	Rank 5	Rank 6	Rank 7	_	

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APPEARANCE

Across all regions, appearance is the lowest ranked attribute. There has been a significant decline in mean ratings in the Middle East & Africa, specifically, over the past year.



Ipsos Contacts



SEAN SIMPSON

Vice President, Ipsos Public Affairs



Sean.simpson@ipsos.com

416-324-2002



JAMES COTTRILL

Account Manager



James.cottrill@ipsos.com

4165724421



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CIGI Contacts



FEN OSLER HAMPSON

Distinguished Fellow Director, Global Security & Politics Centre for International Governance Innovation (CIGI)





ERIC JARDINE

Fellow, Centre for International Governance Innovation (CIGI) Assistant Professor, Virginia Tech



ejardine@cigionline.org



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