



# Understanding Consumers' Needs for Internet Security

November 22, 2005

*Holiday Season Survey*

*of 4,711 Online Consumers in Four Countries*

*by Forrester Custom Consumer Research*

*Commissioned by the Business Software Alliance*

# Methodology

- Survey developed jointly by Forrester Custom Consumer Research in collaboration with BSA.
- Web survey was in the field between Oct 26<sup>th</sup> - Nov 6<sup>th</sup> 2005.
- Surveyed at least 1,000 online consumers in each country:
  - » Canada 1,207 (25.6%)
  - » Germany 1,245 (26.4%)
  - » GB 1,160 (24.6%)
  - » USA 1,099 (23.3%)
  - » **Total 4,711 (100%)**
- Definition of the online population is anyone who is online at least once per week from any location.
- Data weighted to be representative of all online consumers in each respective country.
- Confidence intervals for results between (+/-) 3 percentage points for country level responses.
- International omnibus of 10 closed questions.
- All percentages may not add up to 100% due to rounding.

# Theme

Exploring the consumer issue  
of online protection and  
security – particularly during  
the holiday period

# Agenda

- **Protection**
  - » Shopping and the holiday period
  - » General attitudes toward protection
- **Attitudes and behaviors around online security & software**
  - » Security concerns
  - » Software products held
- **Online consumer knowledge regarding security**
  - » Understanding and awareness of terms
  - » Sources of information
- **Online shopping**
  - » Concern regarding online activities
  - » Trust of companies
- **Summary**
- **Conclusions**

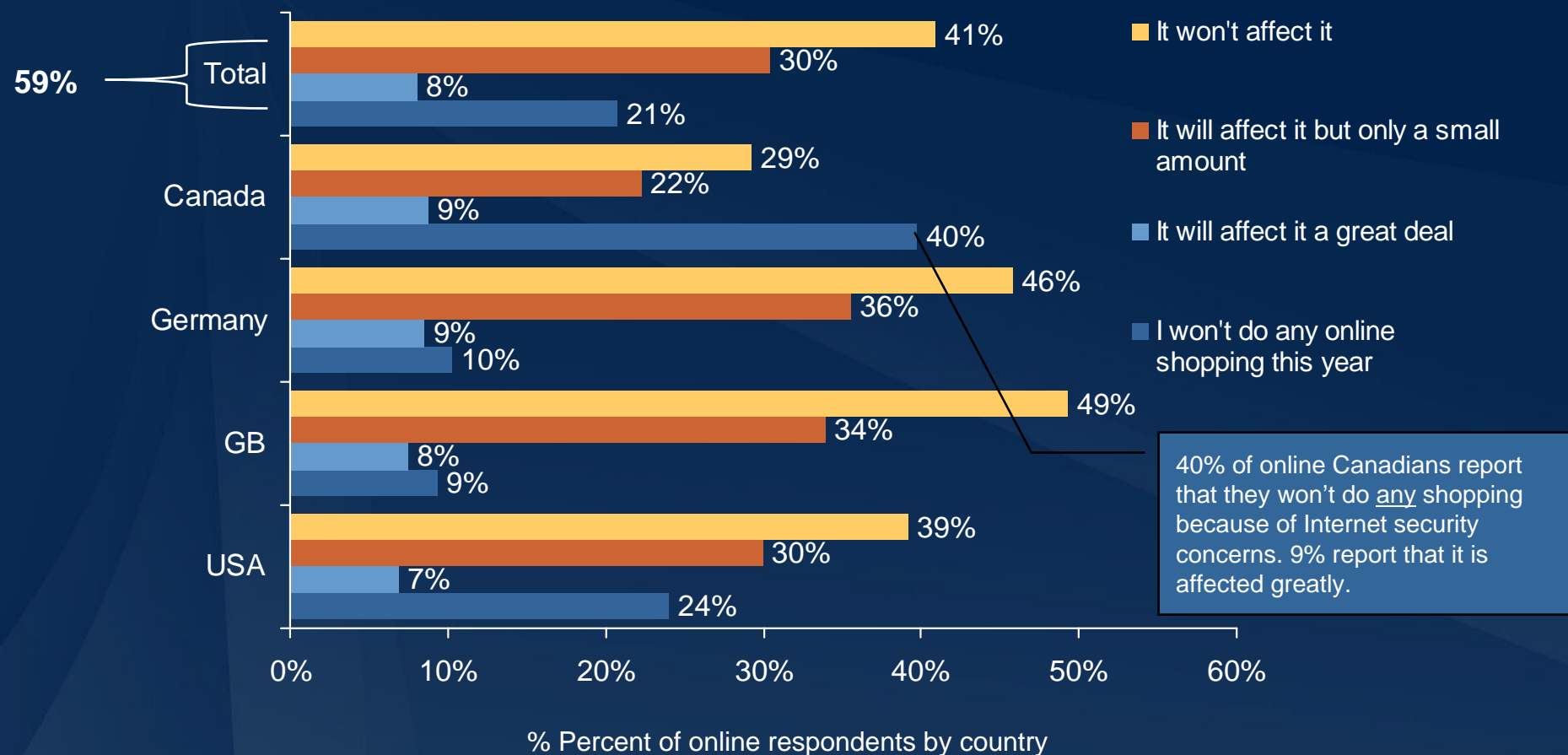
# Section 1.



Protection

# 59% of respondents report that their online holiday shopping will be affected due to Internet security.

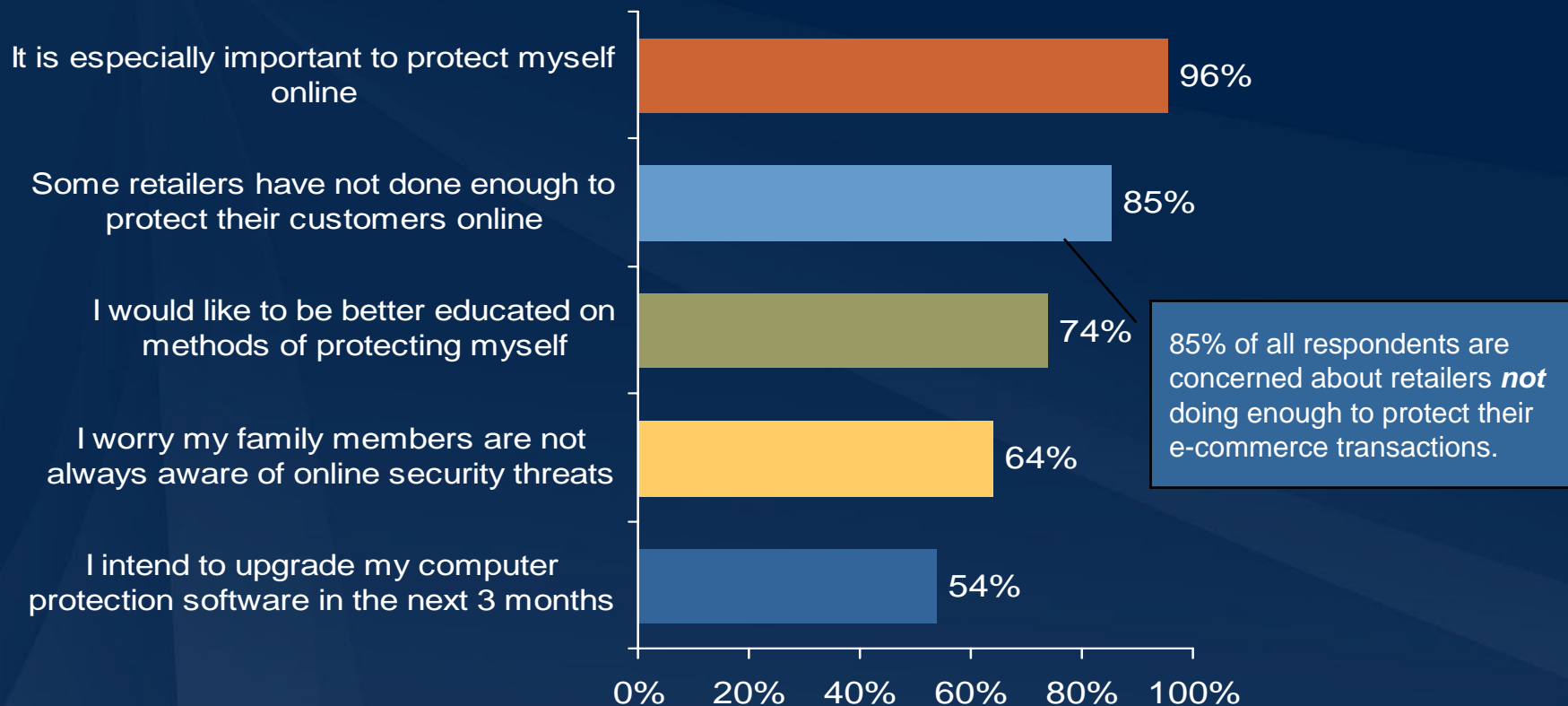
When you think about Internet security, how will it affect your online shopping this holiday season compared to last year?



Base: 4,711 online consumers (All Countries)

# 96% agree that online protection is especially important during the holiday season.

Please indicate how much you agree with each of the following statements surrounding online protection over the holiday period.

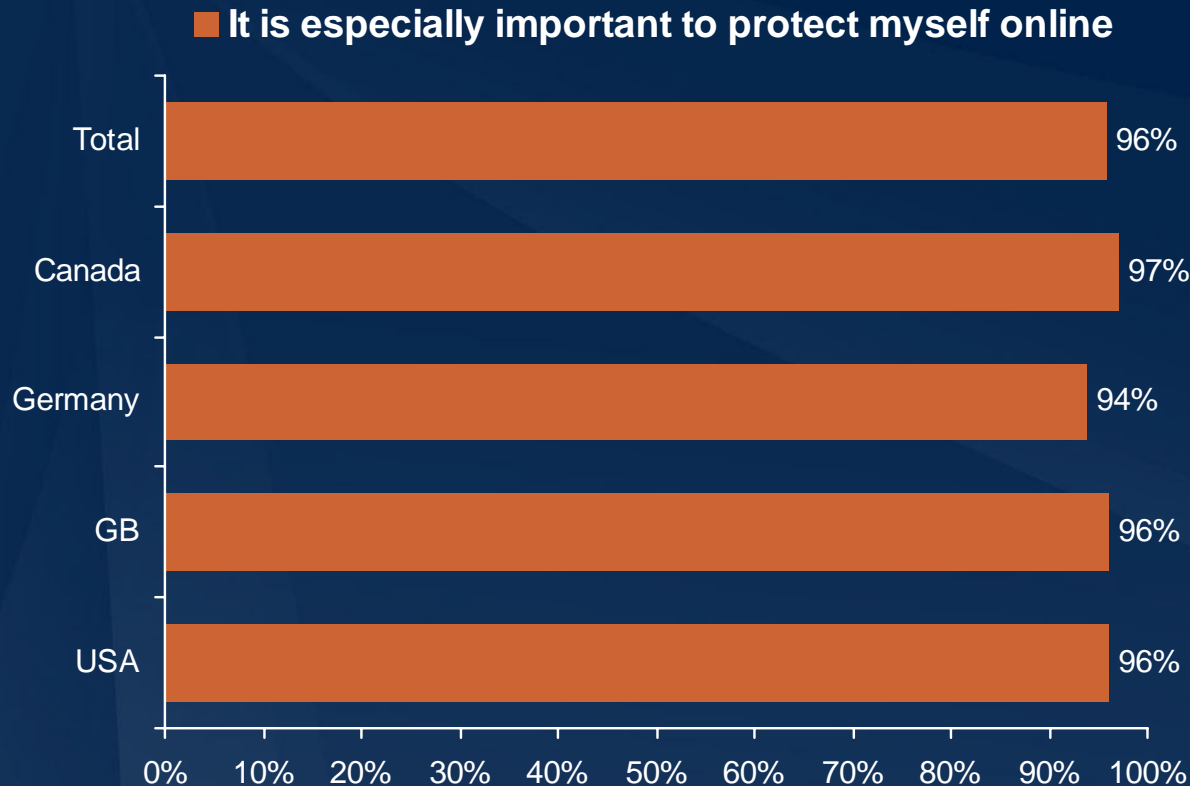


% Percent of responses answering 3 ("Somewhat Agree") and 4 ("Definitely Agree") on a scale from 1-4

Base: 4,711 online consumers (All Countries)

# All countries agree that online protection over the holiday period is important.

Please indicate how much you agree with each of the following statements surrounding online protection over the holiday period.



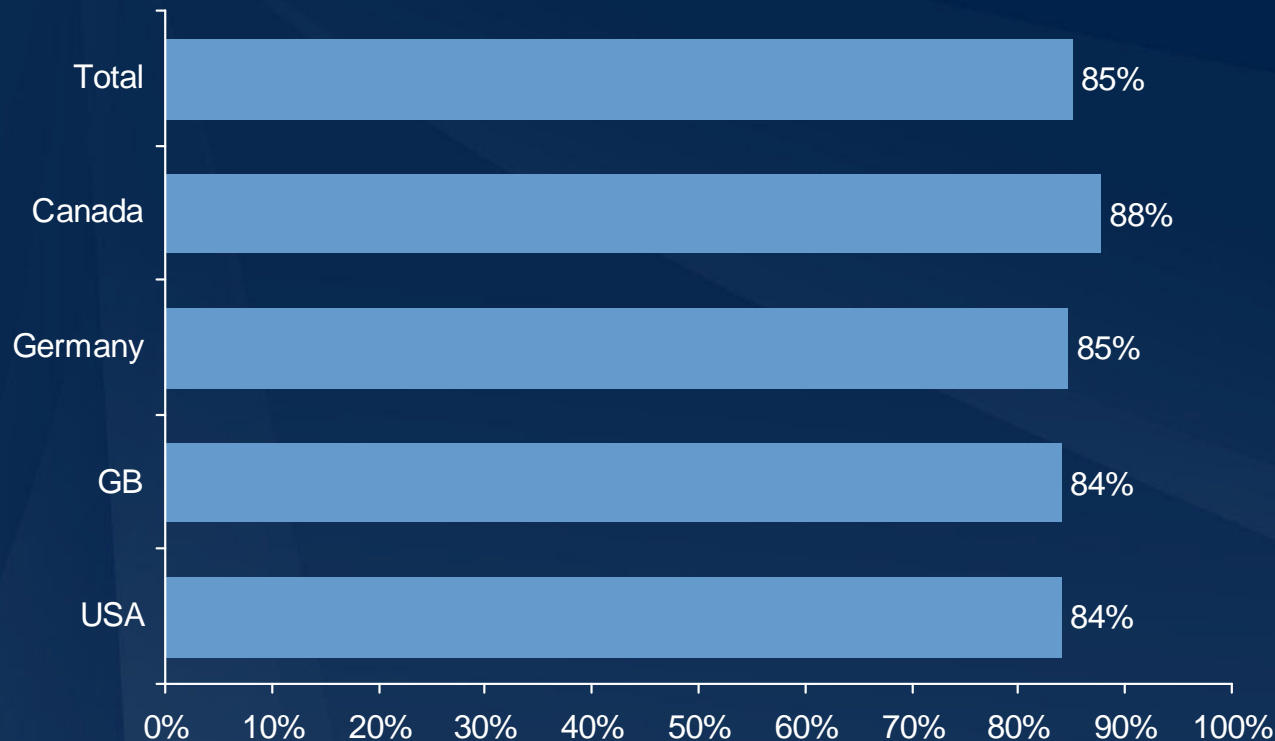
% Percent of responses answering 3 ("Somewhat Agree") and 4 ("Definitely Agree") on a scale from 1-4 by country

Base: 4,711 online consumers (All Countries)

# 85% agree that retailers have not done enough to protect themselves online.

Please indicate how much you agree with each of the following statements surrounding online protection over the holiday period.

■ Some retailers have not done enough to protect their customers online

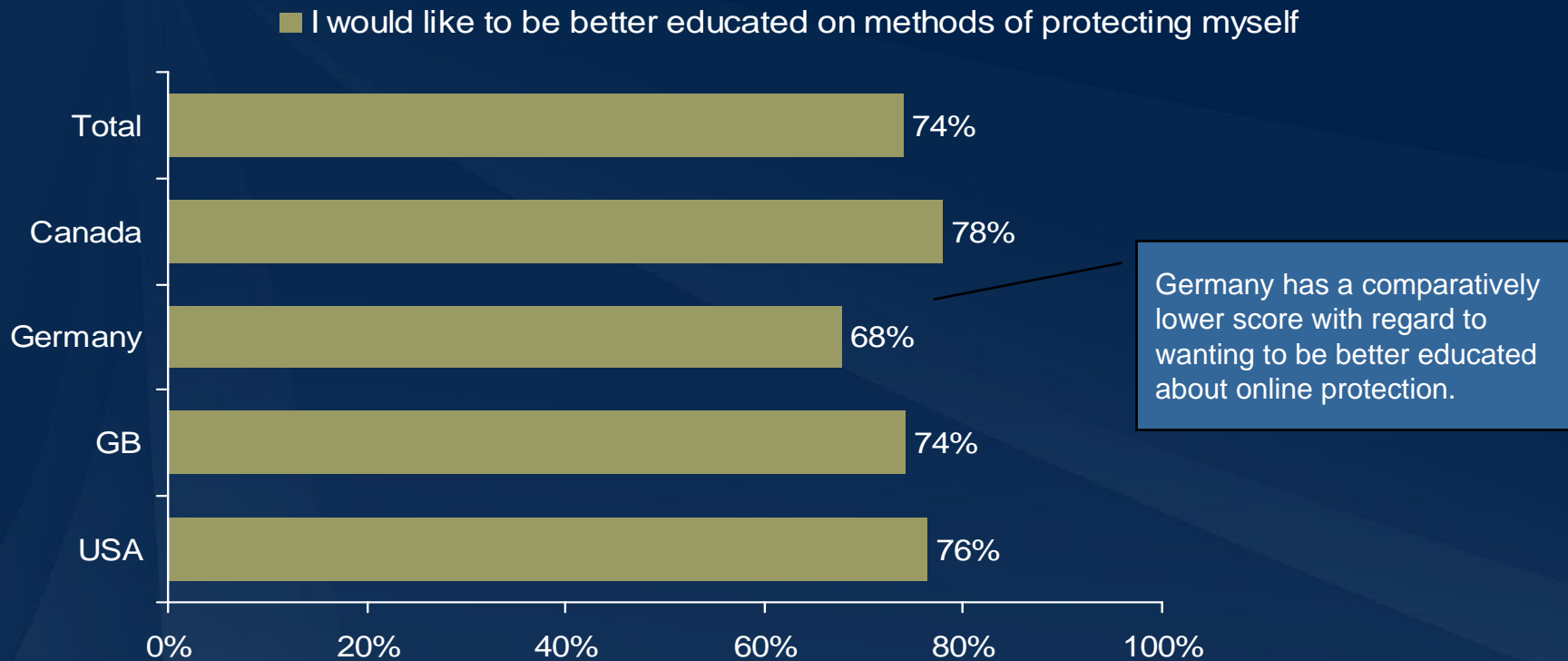


% Percent of responses answering 3 ("Somewhat agree") and 4 ("Definitely Agree") on a scale from 1-4

Base: 4,711 online consumers (All Countries)

# 3/4 of respondents would like to be better educated.

Please indicate how much you agree with each of the following statements surrounding online protection over the holiday period.

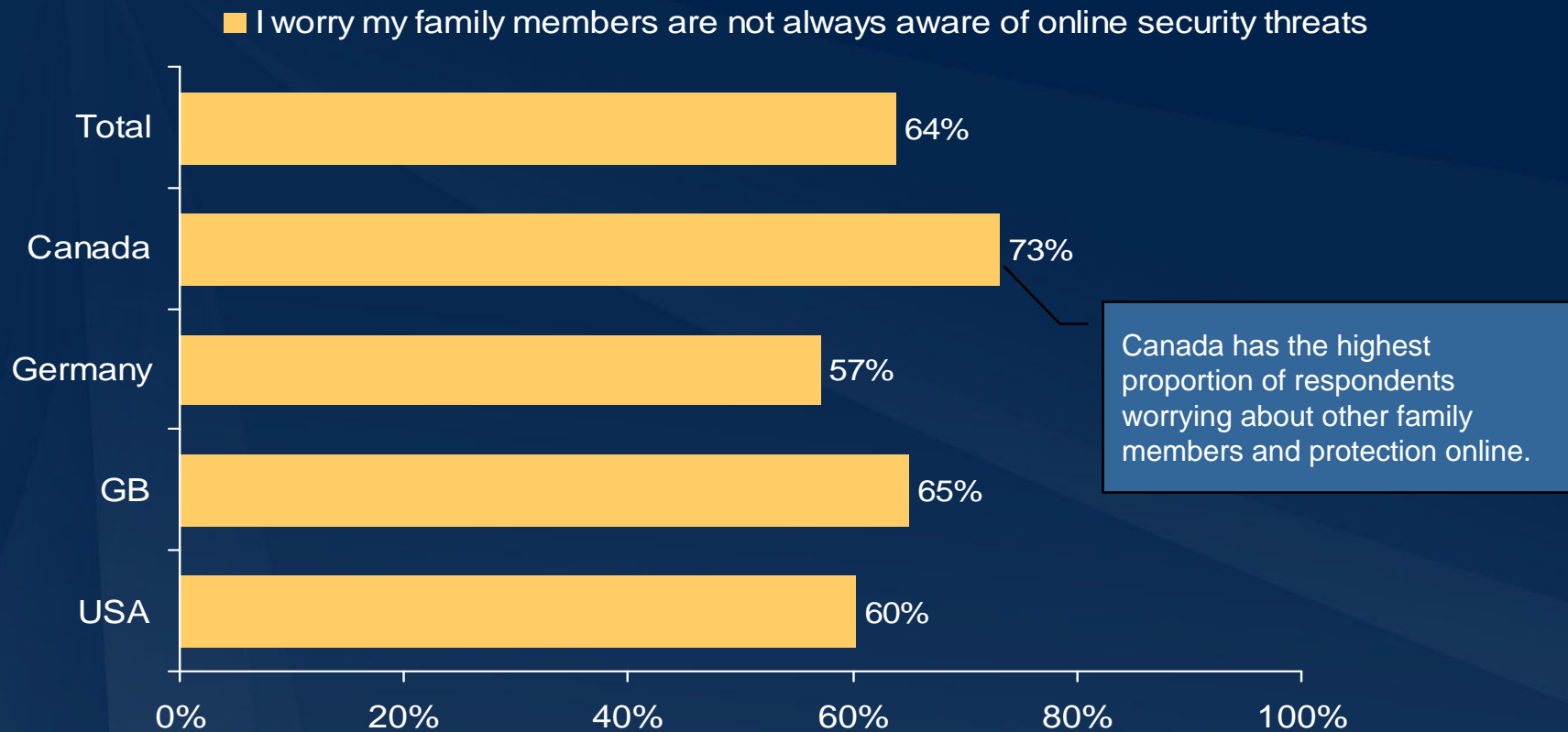


% Percent of responses answering 3 ("Somewhat Agree") and 4 ("Definitely Agree") on a scale from 1-4

Base: 4,711 online consumers (All Countries)

# 64% worry that family members are not always aware of online security threats.

Please indicate how much you agree with each of the following statements surrounding online protection over the holiday period.

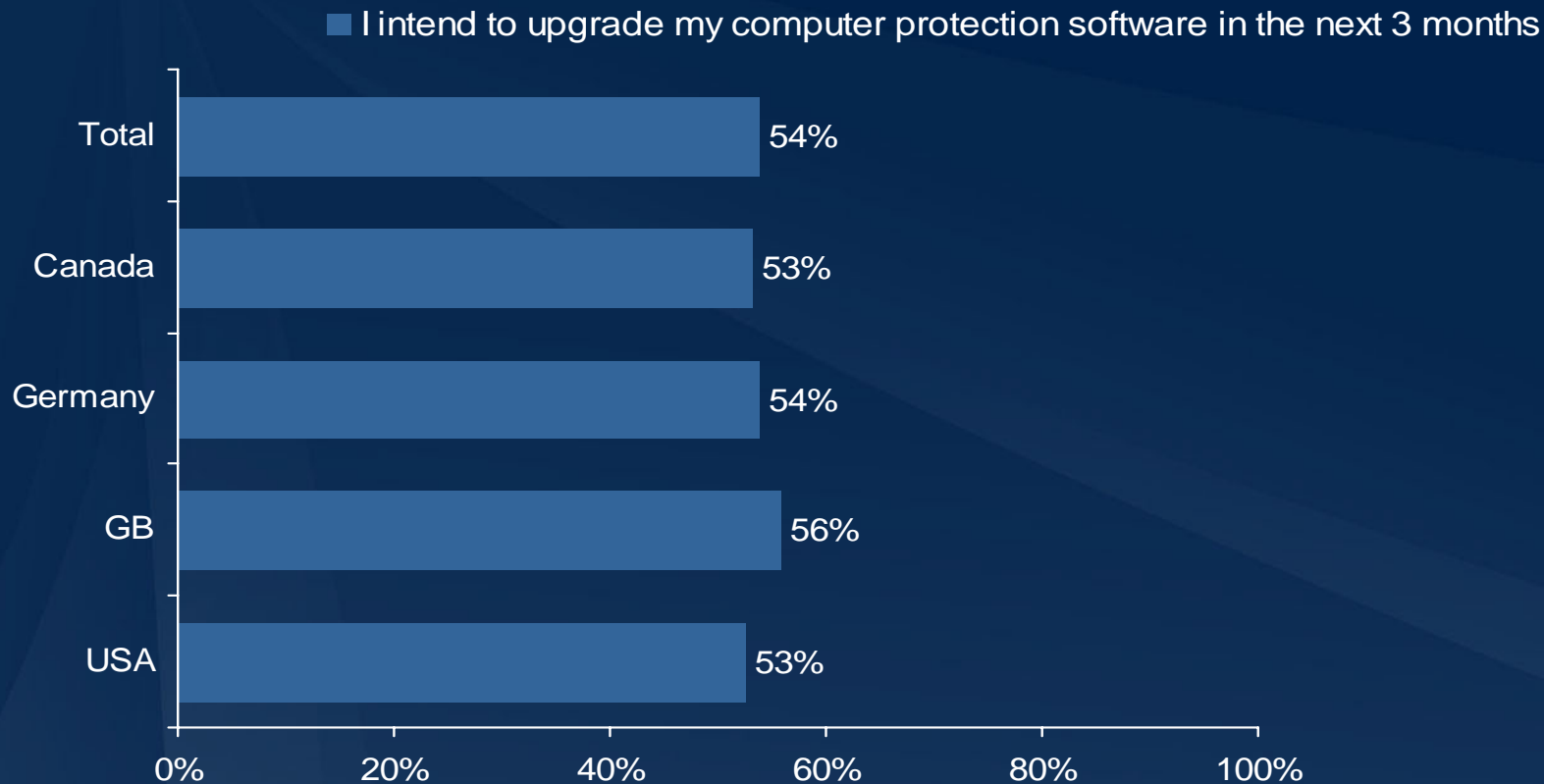


% Percent of responses answering 3 ("Somewhat agree") and 4 ("Definitely Agree") on a scale from 1-4

Base: 4,711 online consumers (All Countries)

# Over half of respondents say that they will be upgrading their protection software in the next 3 months.

Please indicate how much you agree with each of the following statements surrounding online protection over the holiday period.



% Percent of responses answering 3 ("Somewhat Agree") and 4 ("Definitely Agree") on a scale from 1-4

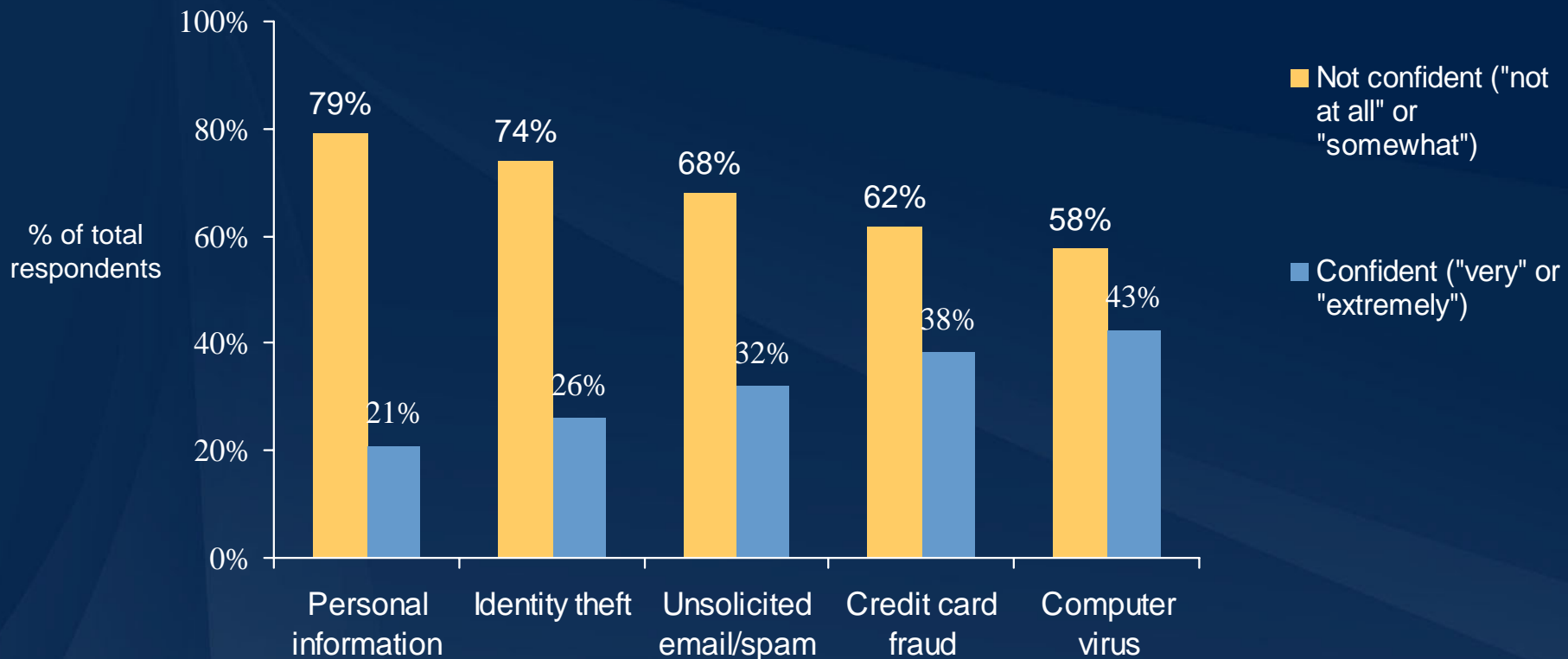
Base: 4,711 online consumers (All Countries)

## Section 2.

**Attitudes and behaviors  
around online security &  
software**

# Personal information being sold to a third party is the biggest security concern.

How confident are you in your ability to protect yourself from the following threats online?

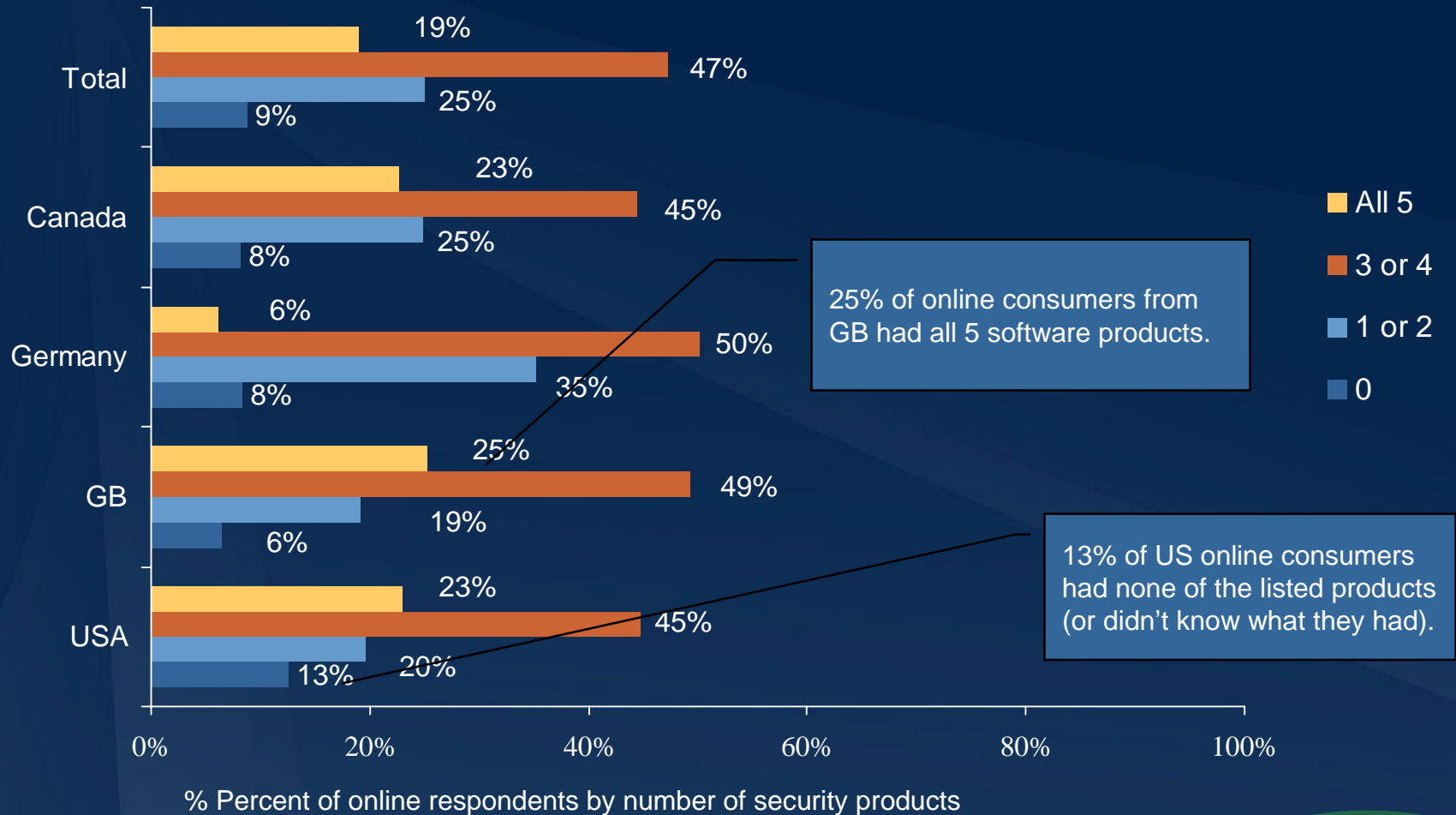


% Percent of respondents answering 1 or 2 ("Not confident") or 3 or 4 ("Confident") on scale from 1-4

Base: 4,711 online consumers (All Countries)

# 2/3 of all online respondents have 3 or more security software products.

Please indicate the types of software you have to protect yourself from online risks. (Select all that apply)



% Percent of online respondents by number of security products

Base: 4,711 online consumers (All Countries)

# The average number of security software products held was 3 (out of 5 listed).

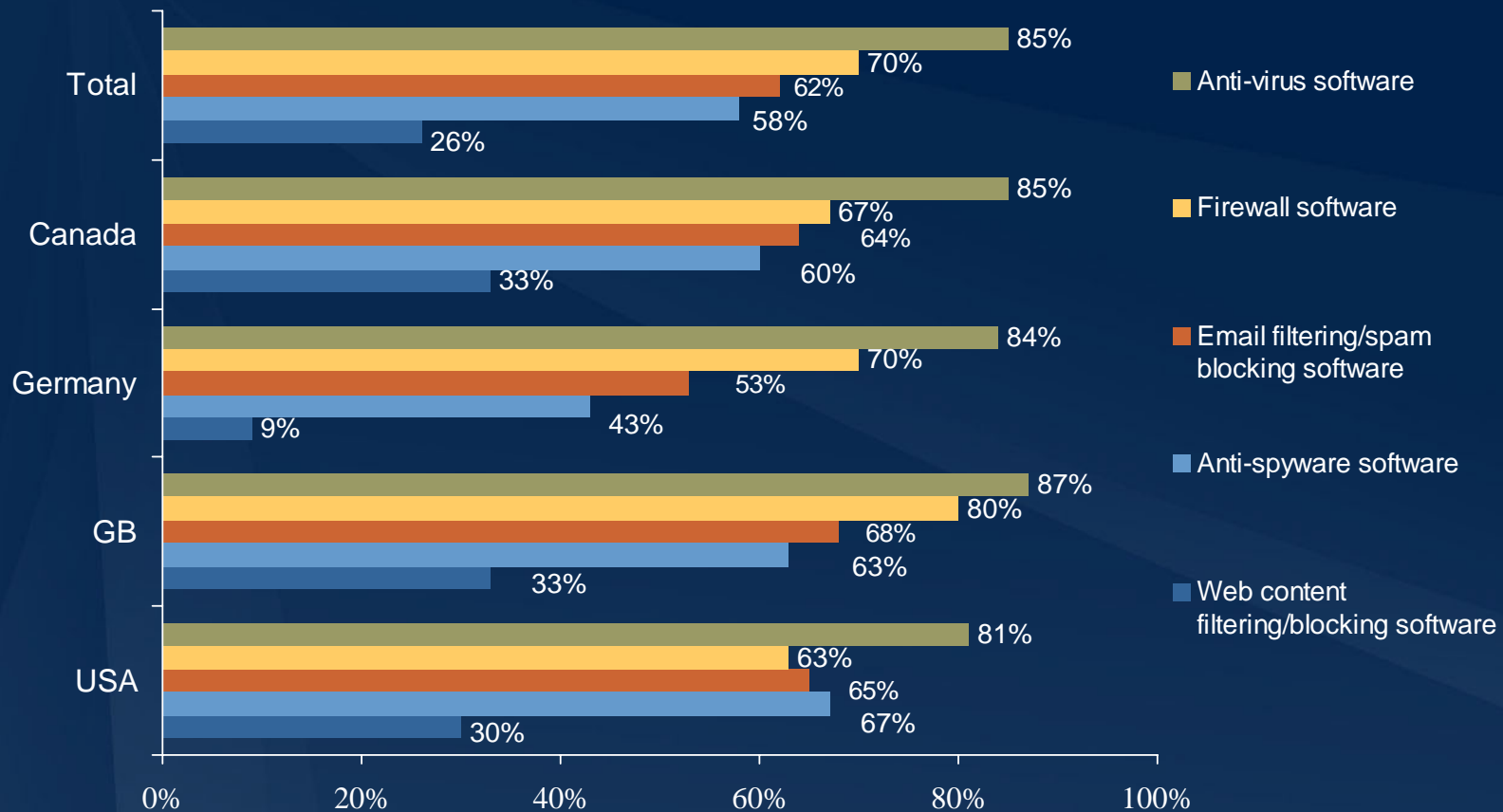
Mean number of security products by country.

	Canada	Germany	GB	USA	Total
Mean number of security products	3.10	2.59	3.32	3.05	3.01

Base: 4,711 online consumers (All Countries)

# Anti-virus, firewall and email filtering are the most popular software protection products.

Please indicate the types of software you have to protect yourself from online risks. (Select all that apply)



% Percent of online respondents (by country) who own each security product

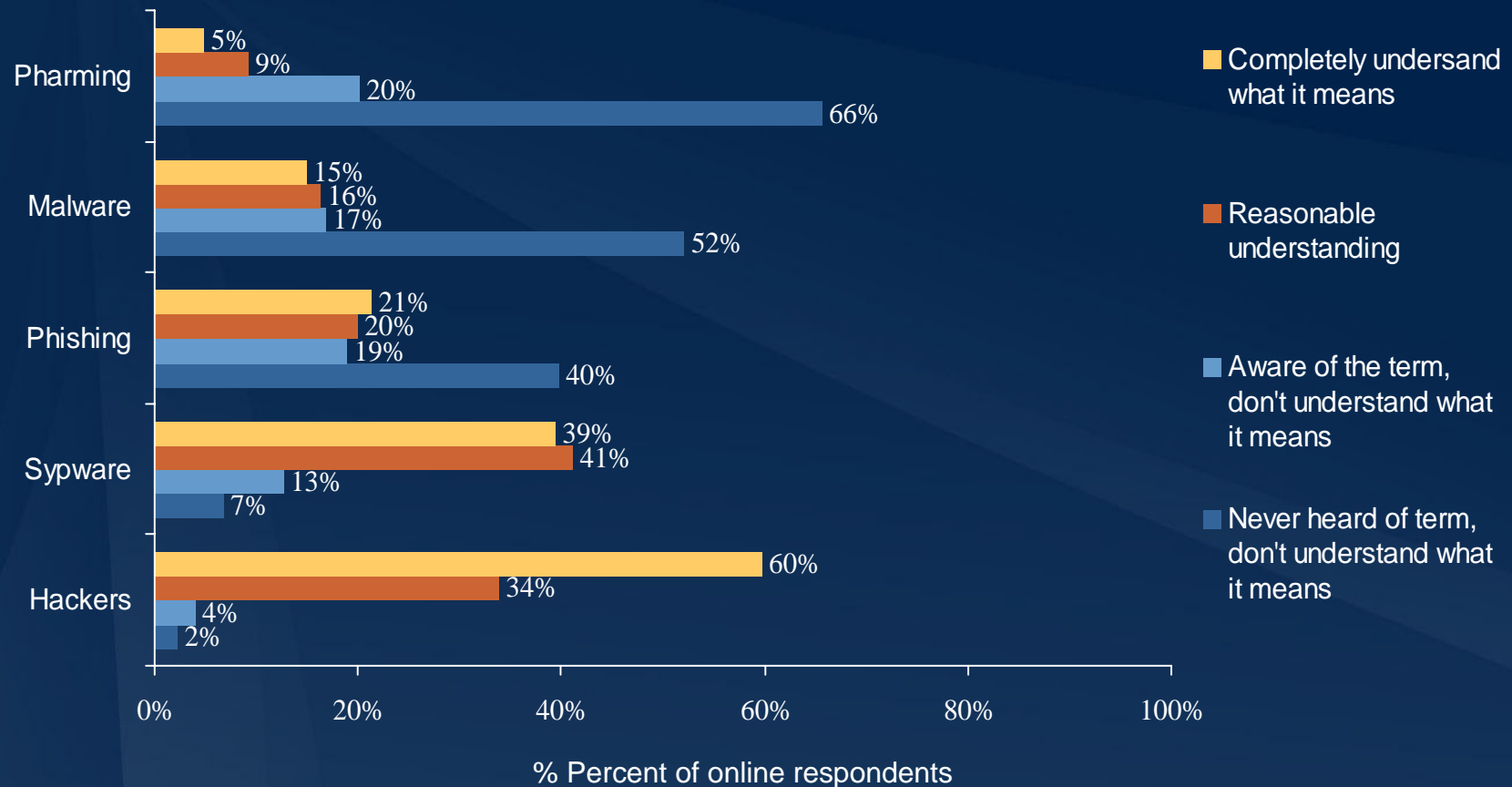
Base: 4,711 online consumers (All Countries)

## Section 3.

**Consumer knowledge  
regarding security  
protection online**

# “Pharming” and “Malware” are terms which are the least understood by online users.

Please indicate the level of understanding you have of the following terms/phrases, which are sometimes used in talking about security threats online.



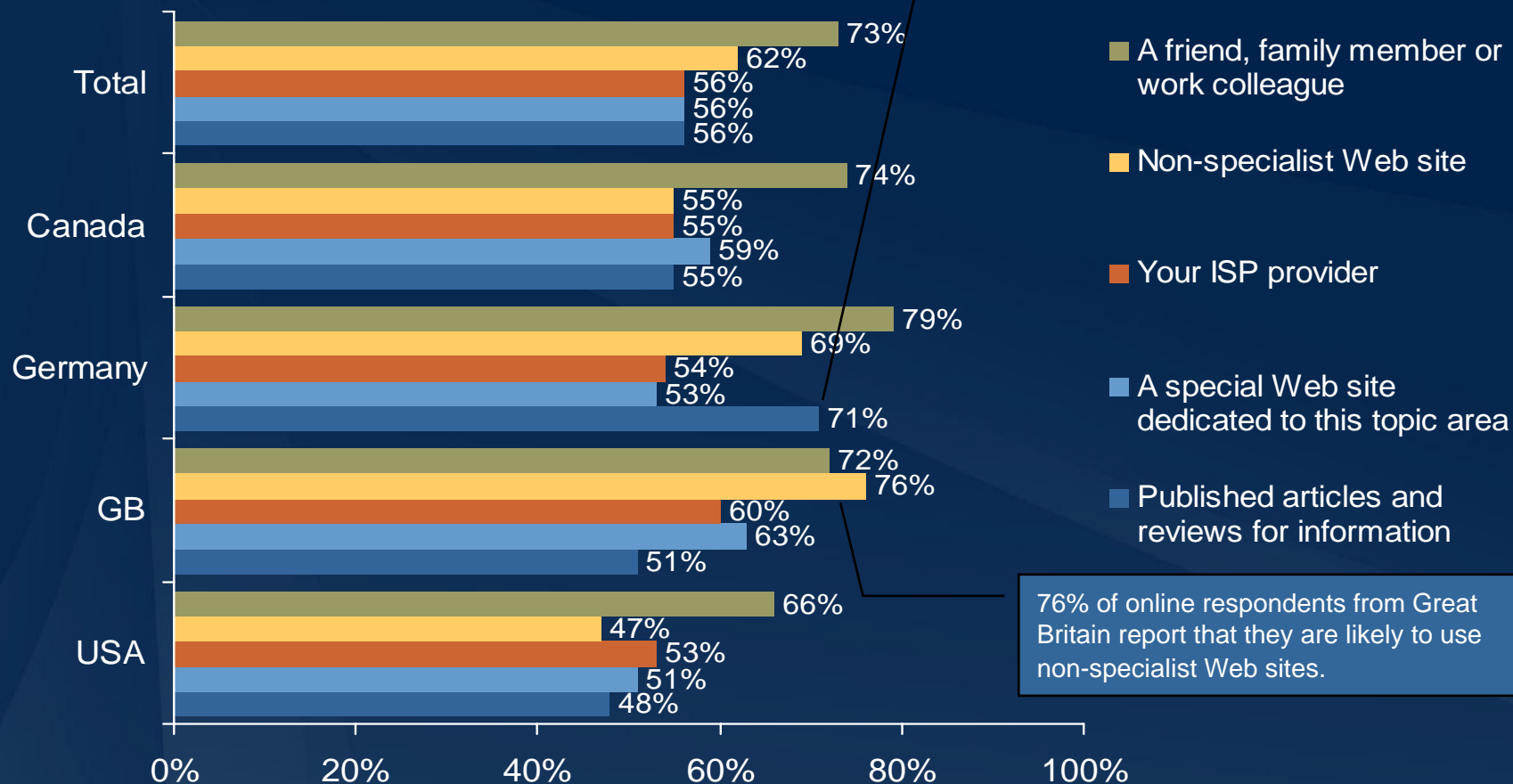
Base: 4,711 online consumers (All Countries)

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# 1 in 2 people wants a special Web site dedicated to the topic area of online protection.

71% of online German respondents report that they are likely to use published articles and reviews for security information.

Where are you likely to go to find information on how to protect yourself online?



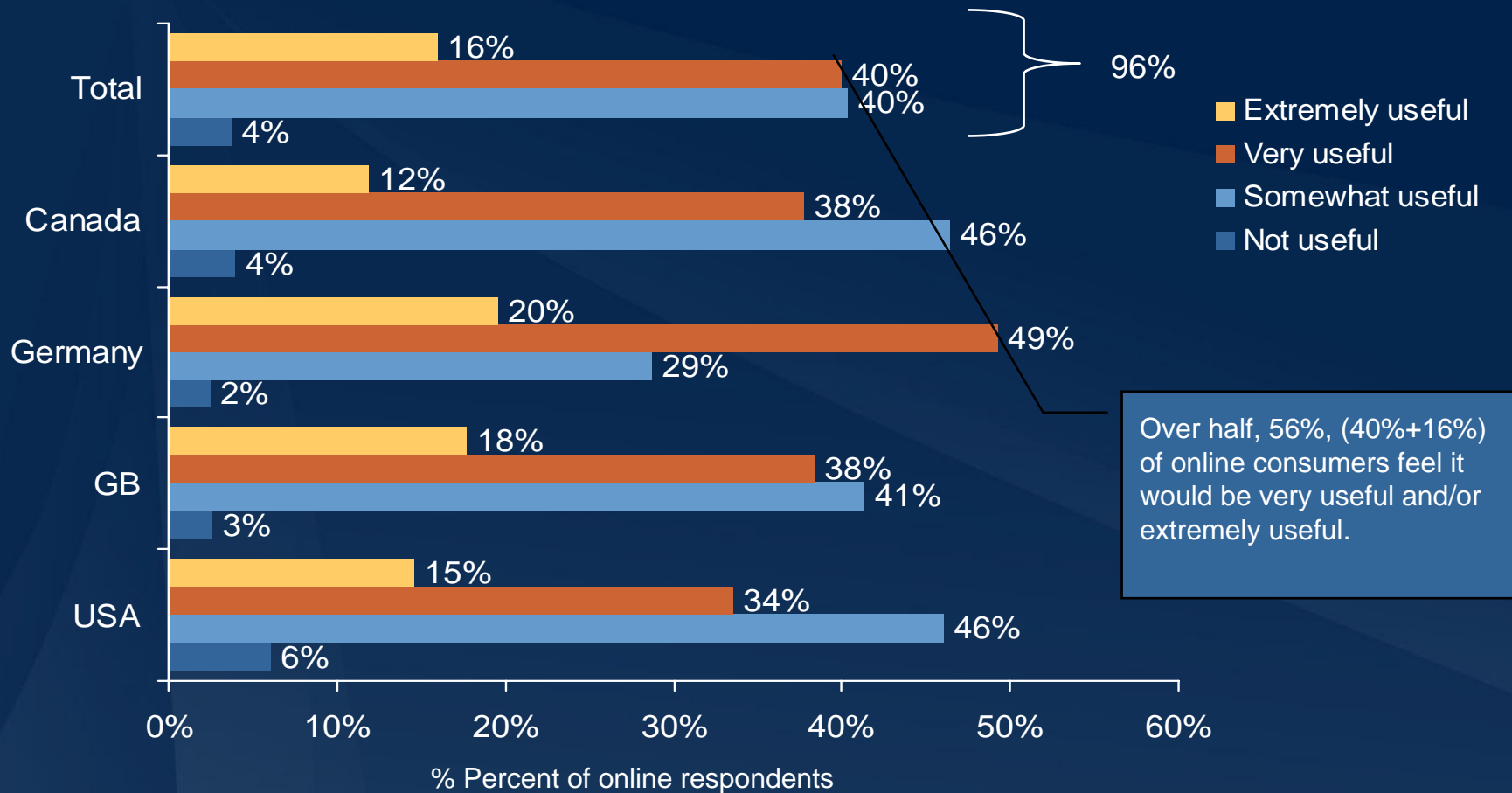
76% of online respondents from Great Britain report that they are likely to use non-specialist Web sites.

% Percent of responses answering 3 ("Somewhat Likely") and 4 ("Extremely Likely") on a scale from 1-4

Base: 4,711 online consumers (All Countries)

# 96% of online consumers would find a dedicated Web site for online security and safety issues useful.

If a Web site were dedicated to helping you understand more about online security and safety issues and how you can protect yourself, how useful would that be to you?



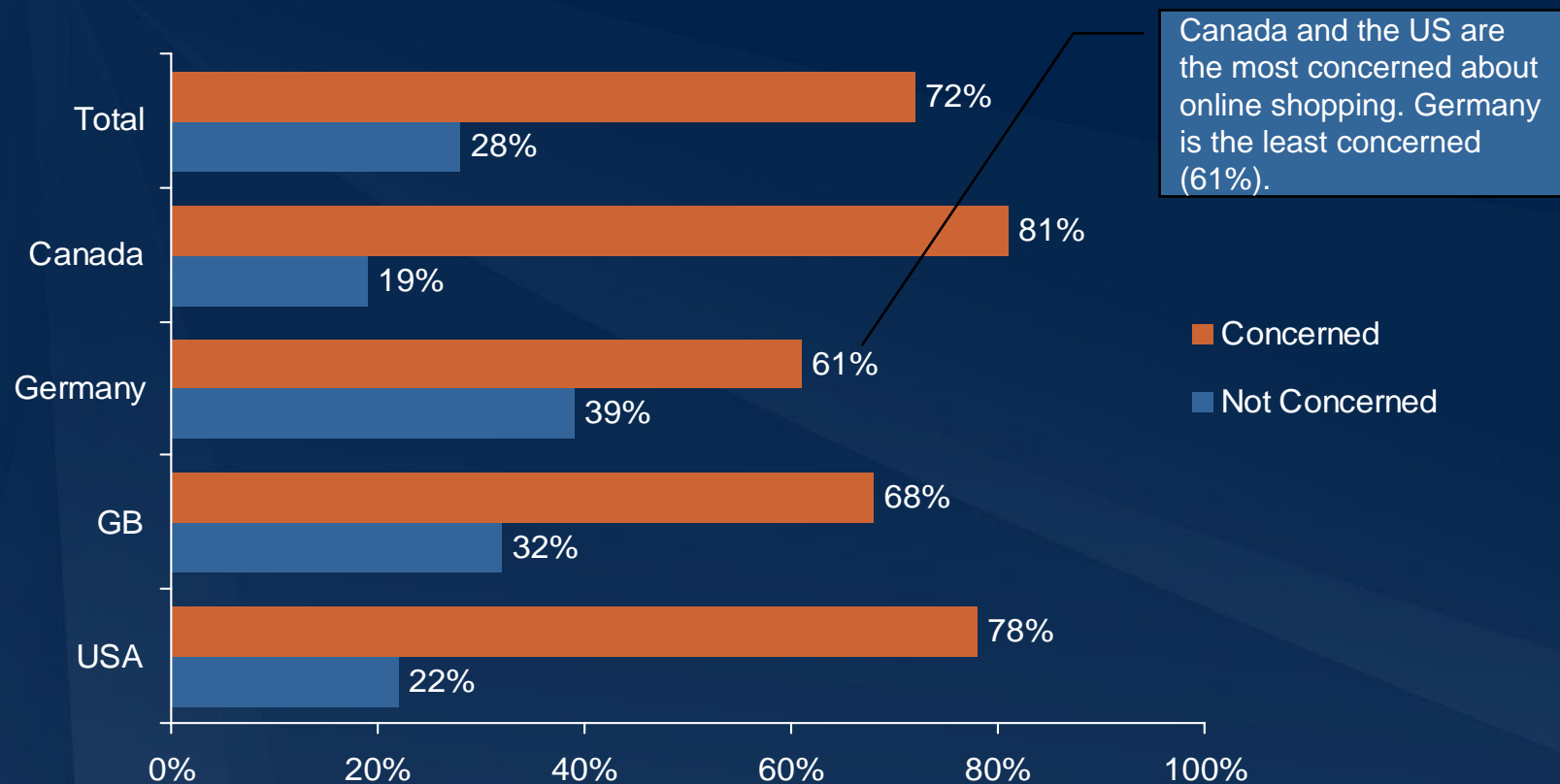
Base: 4,711 online consumers (All Countries)

## Section 4.

**Online shopping**

# Consumers are generally concerned about shopping activities online. Canada is the most concerned.

How concerned are you about Internet security when conducting the following types of online activities?  
“general online shopping”

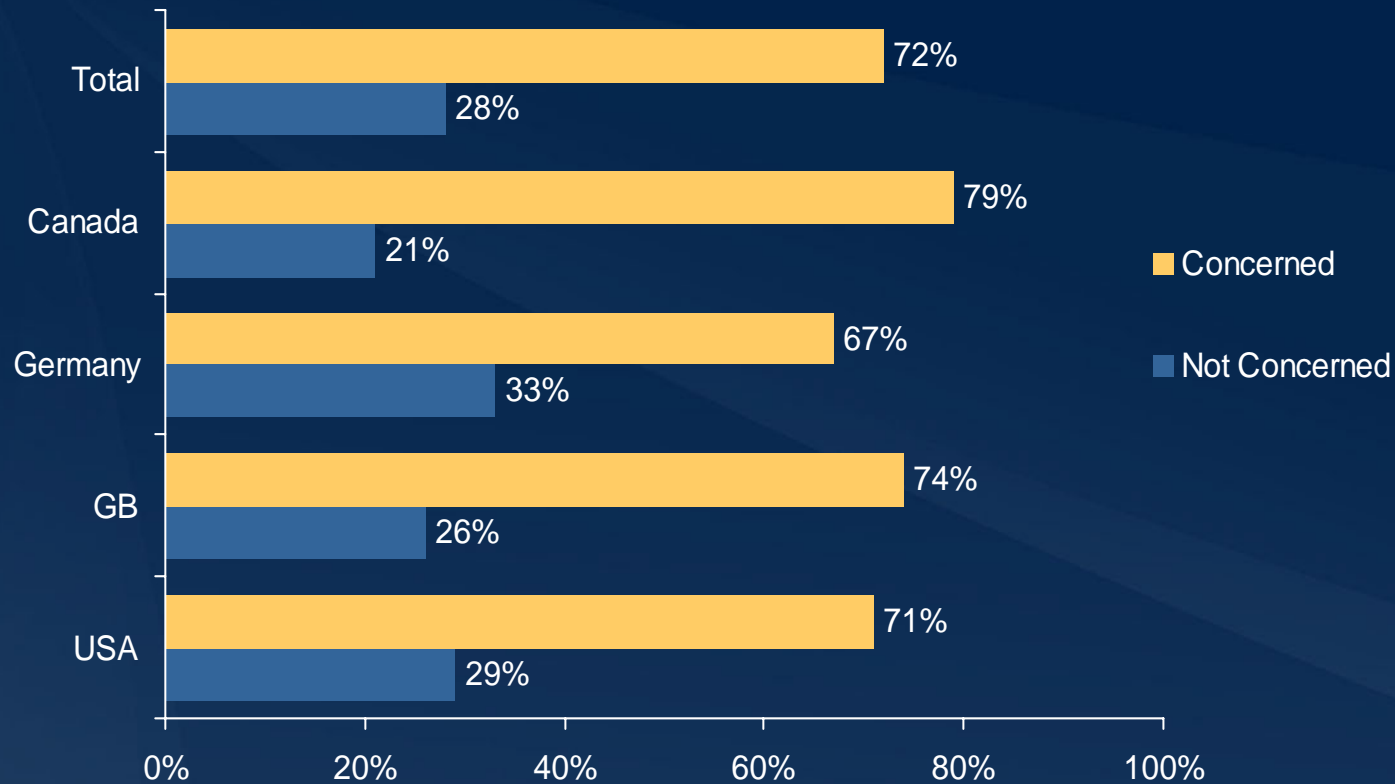


% Percent of respondents answering 2 (“Somewhat concerned”) 3 (“Very Concerned”) and 4 (“Extremely Concerned”) on a scale from 1-4

Base: 4,711 online consumers (All Countries)

# 72% are concerned about bidding/selling goods on auction sites.

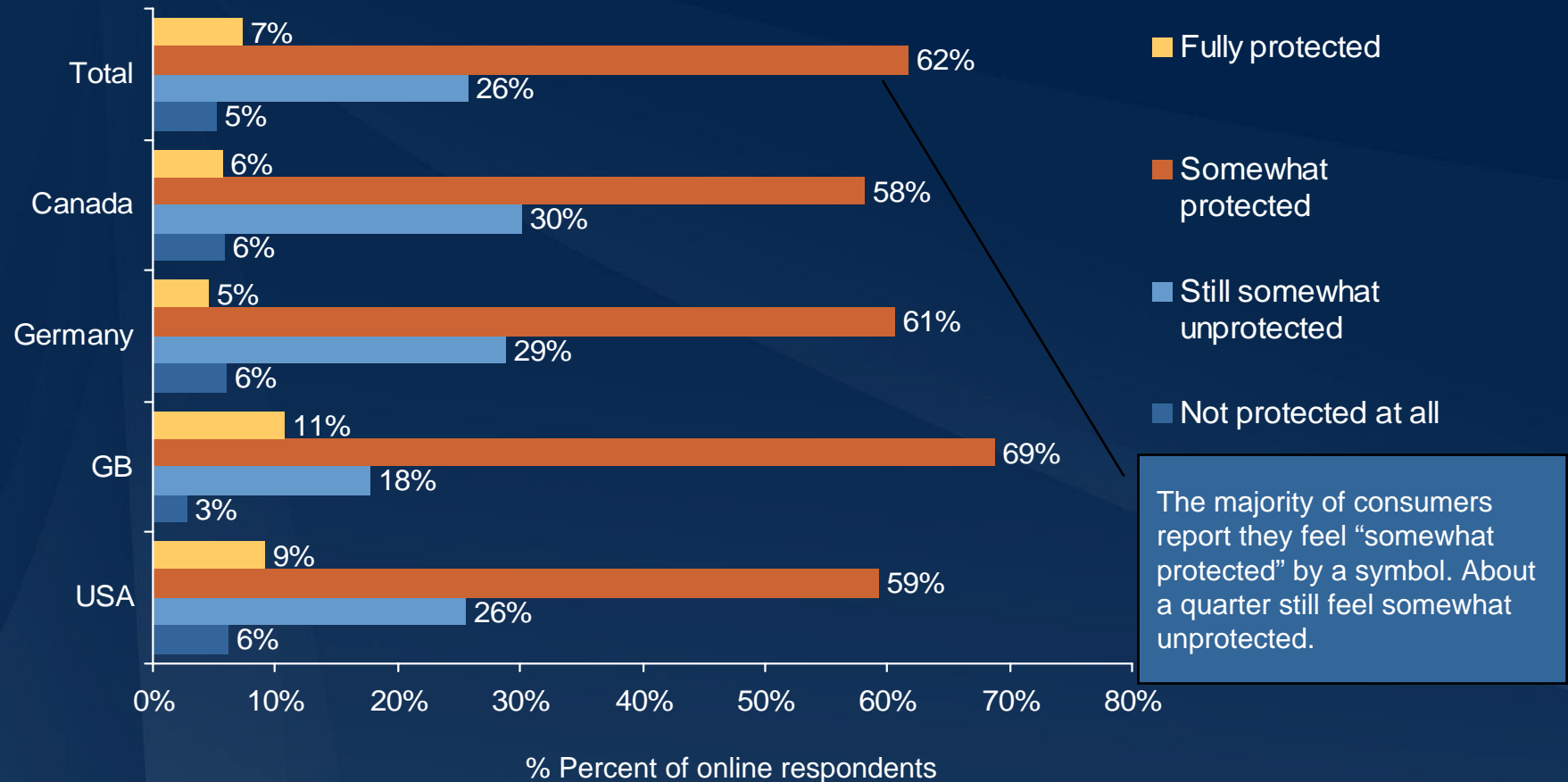
How concerned are you about Internet Security when conducting the following types of online activities?  
“bid /sell goods on auction sites”



% Percent of respondents answering 2 (“Somewhat concerned”) 3 (“Very Concerned”) and 4 (“Extremely Concerned”) on a scale from 1-4

# Symbols inspire some confidence, but many still feel somewhat unprotected.

If a company displays an official mark or symbol declaring its Web site's safety, how protected would that make you feel?



Base: 4,711 online consumers (All Countries)

# Section 5.

**Summary &  
conclusions**

# Summary (1)

- 59% agree that their holiday shopping will be affected by the issue of online security.
- 96% say a dedicated Web site to security issues and online protection would be useful.
- Two thirds of online consumers have 3 or more security software products.
- 96% believe that it is important to protect themselves online over the holiday period.

## Summary (2)

- 85% agree that some retailers have not done enough to protect consumers online.
- 69% say that they would feel somewhat protected or fully protected by a sign that would represent a Web site's safety.
- Over half intend to upgrade their protection software in the next 3 months.

# Key Conclusions

- Protection online is a key concern, particularly over the holiday period, and online spending will be somewhat affected.
- Most online consumers have taken proactive steps to protect themselves from Internet security risks.
- There is a market for a dedicated Web site for online security and software protection issues.
- Online retailers could be doing more to reassure consumers such as displaying on their site an official mark or symbol that attests to the Web site's safety.