



CYBERSECURITY AWARENESS MONTH

Survey Report

September 2020

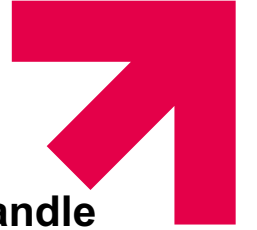
Research Objectives & Methodology

The National Cyber Security Alliance (NCSA) engaged in a study to better understand consumer behavior around internet-connected devices and perceptions of security. NCSA also explored generational differences in perception and behavior changes during Covid-19.

Methodology

Method	Toluna Custom Survey
Fieldwork Timing	September 9, 2020 – September 15, 2020
Sample Size	n=1000 Total Respondents n=500 ages 18-34 n=500 ages 50-75
Sample Criteria	<ul style="list-style-type: none">• US only• Consumers ages 18-34 and 50-75• Currently own a connective device
NOTES	<ul style="list-style-type: none">• T2B = Top 2 Box score, summarizing positive responses from the top two response options

Executive Summary and Key Findings

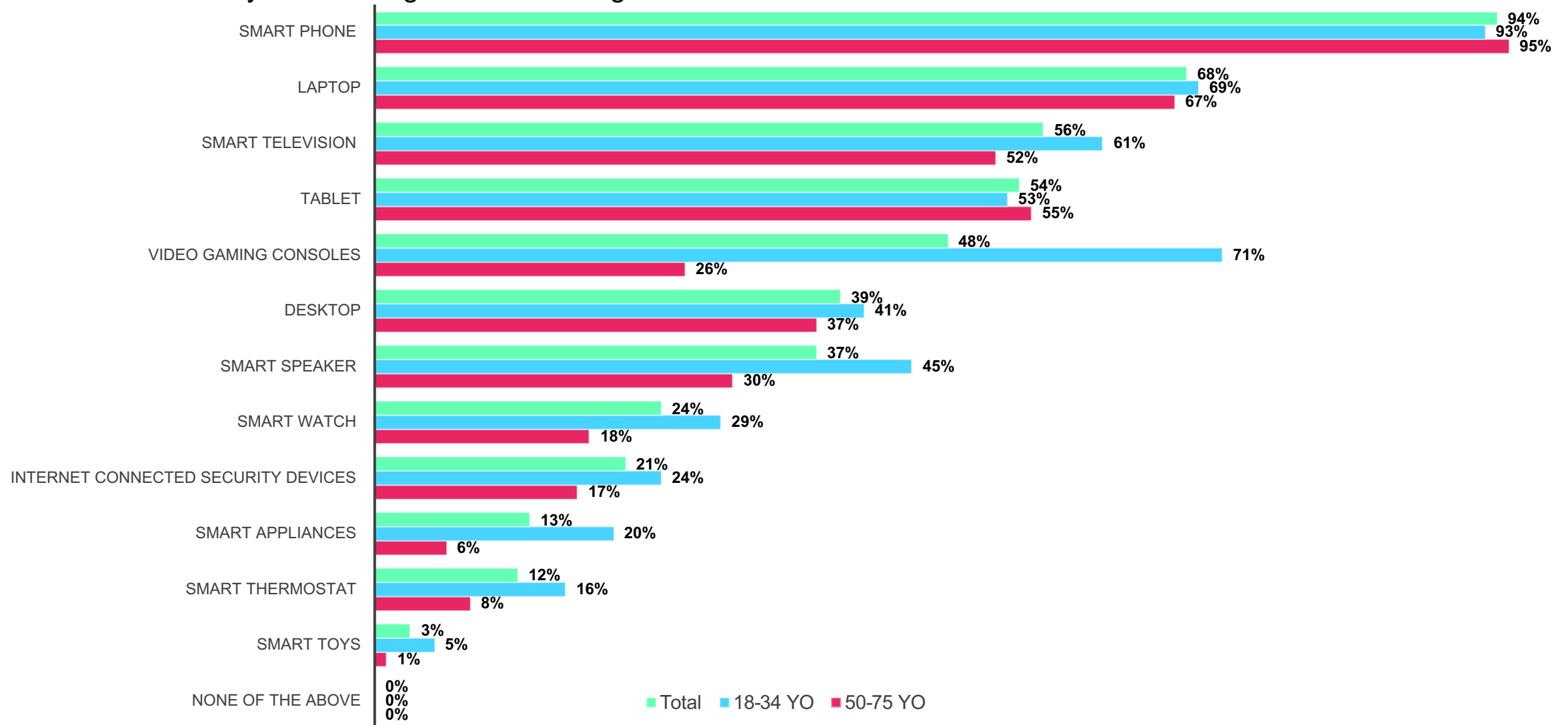


- ▶ **Smartphones, laptops, and smart TVs are the top three internet-connected devices owned.**
 - ▶ Young adults are also highly likely to own video game consoles.
- ▶ **Nearly half of all respondents say they always research how device manufacturers and corporations handle data collection and user privacy; yet, less than half of all respondents take the necessary proactive steps to stay secure by updating their anti-virus software or enabling two-factor authentication (2FA).**
 - ▶ 50-75 year-olds are far less likely to always research.
 - ▶ More than 50% of 18-34 year-olds say they always research.
 - ▶ Only 35% update their anti-virus, firewall or anti-malware software.
 - ▶ Only 39% enabled 2FA on all connected devices on their network.
- ▶ **Older respondents tend to be more risk averse and refrain from compromising personal data than younger respondents.**
 - ▶ Older respondents feel less confident in the security of the connected devices in their home than average, while nearly half of 18-34 year-olds are very confident.
 - ▶ 44% of younger adults also say they always accept when they receive a push notification on an app, while only 17% of older respondents do the same.
 - ▶ Younger respondents are much more comfortable with keeping their data backed up on a cloud storage service than older respondents do.
 - ▶ Only 20% of older respondents feel very confident in their ability to identify a malicious email or link, while almost half of 18-34 year-olds feel very confident.
 - ▶ 55-75 year-olds seem to be more risk averse when considering using public WiFi – 42% never use it. 18-34 year-olds, however, use it more often (54% T2B).

Detailed Findings

Types of Devices

- ▶ Smartphones, laptops, and smart TVs are the top three internet-connected devices owned. 18-34-year-olds are much more likely than average to own video game consoles as well.

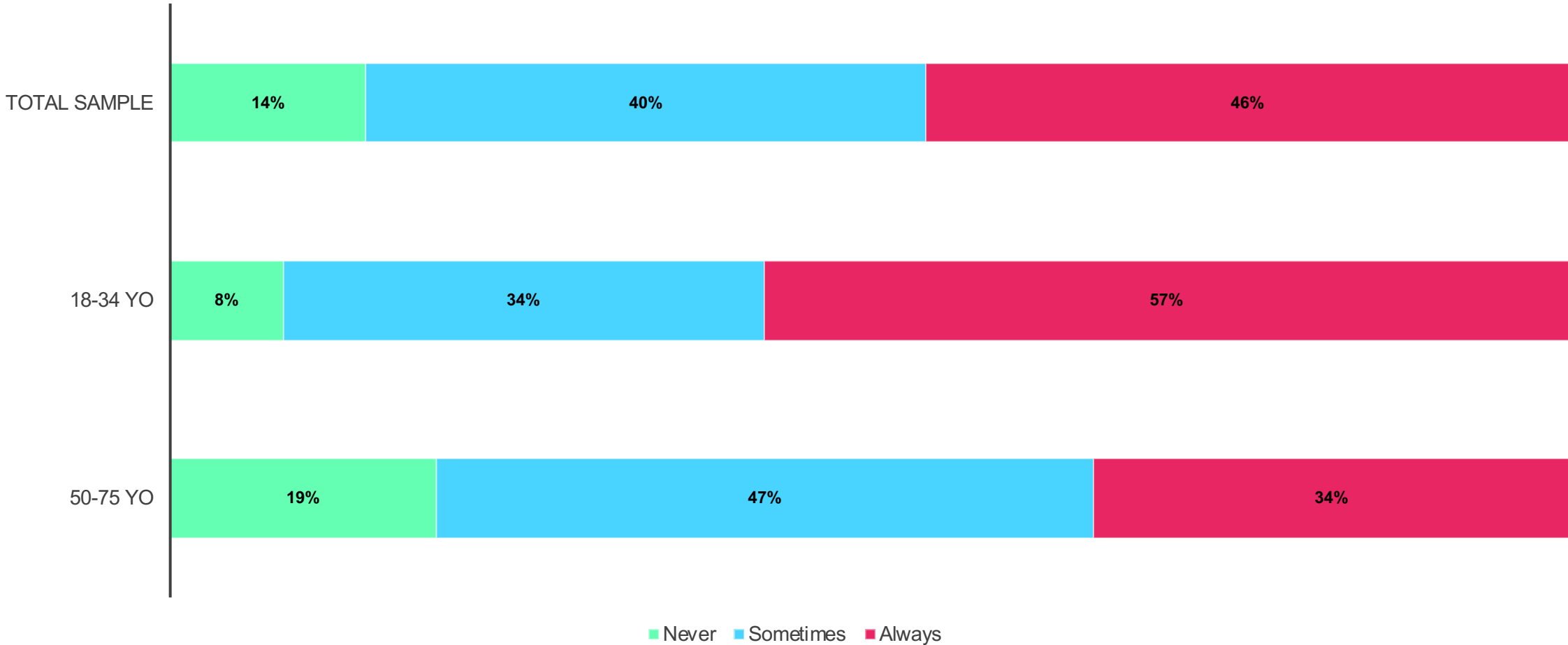


Q1. Which of the following internet-connected devices do you currently own or use on a regular basis?

Base: Total Sample (n=1000), Total 18-34 YO (n=500), Total 50-75 YO (n=500)

Data Collection Research

▶ Overall, nearly half say they always research how device manufacturers handle data collection and user privacy. However, **50-75 year-olds are far less likely to always research** than average, while **over half of 18-34 year-olds do so consistently**.

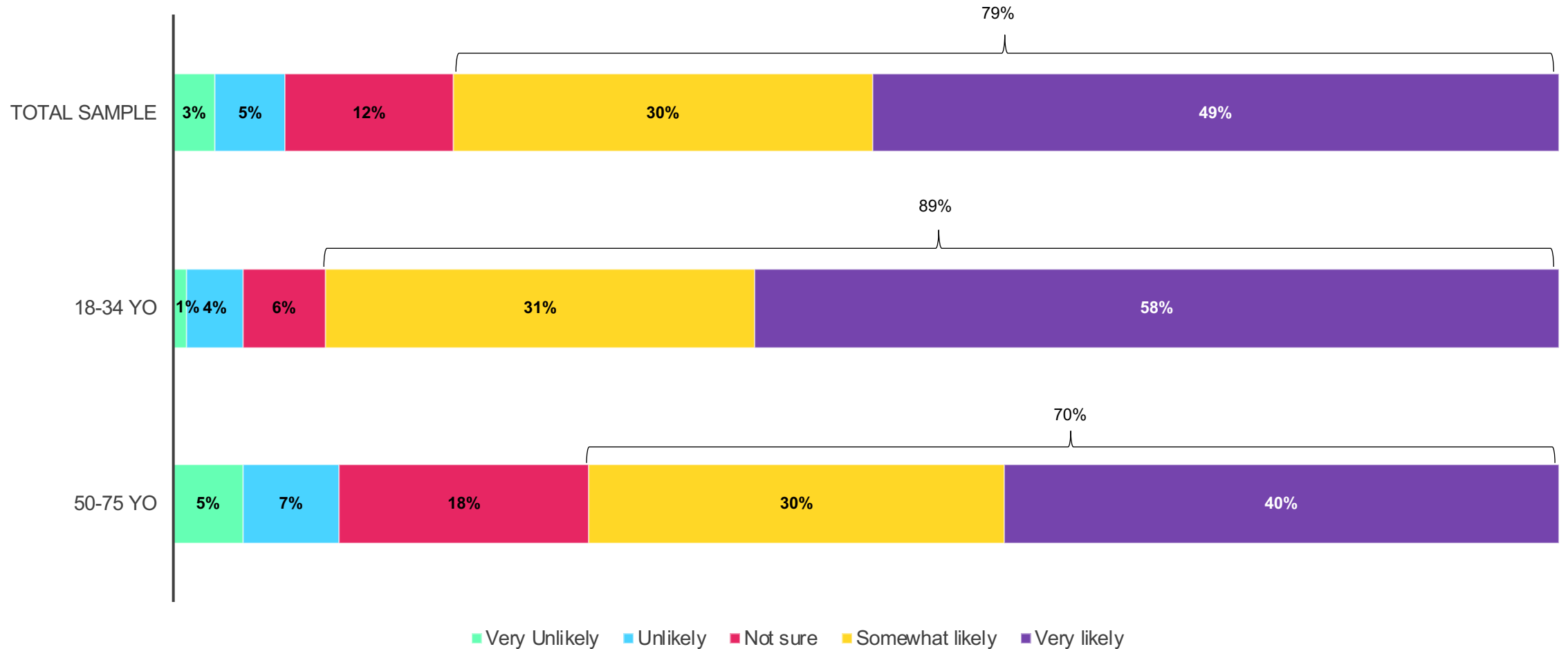


Q2. Before purchasing a new connected device, do you research how device manufacturers handle data collection and user privacy?
Base: Total Sample (n=1000), Total 18-34 YO (n=500), Total 50-75 YO (n=500)



2FA Enabled

- ▶ **Younger adults are much more likely to enable 2FA than older adults are**— 89% of 18-34 year-olds say they are highly likely (T2B) to enable 2FA, while 70% of 50-75 year-olds say the same.

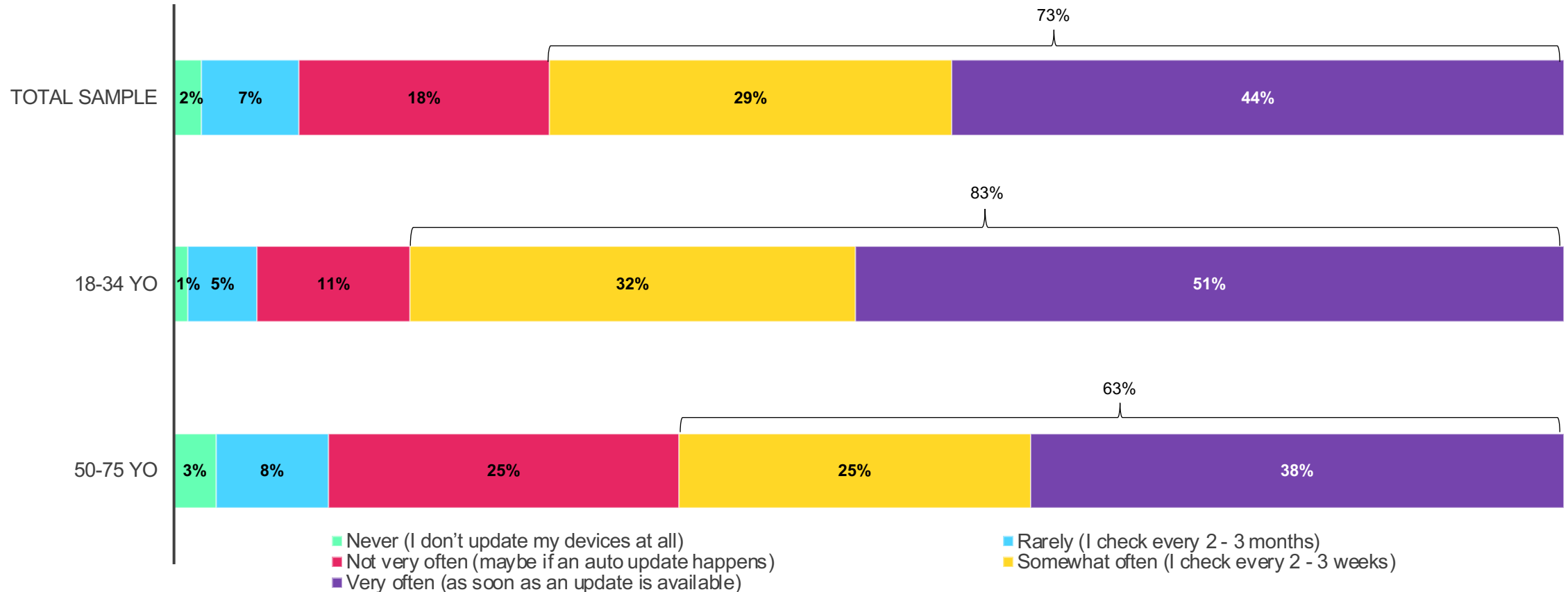


Q3. How likely are you to enable 2FA?

Base: Total Sample (n=1000) Total 18-34 YO (n=500), Total 50-75 YO (n=500)

Software Updates

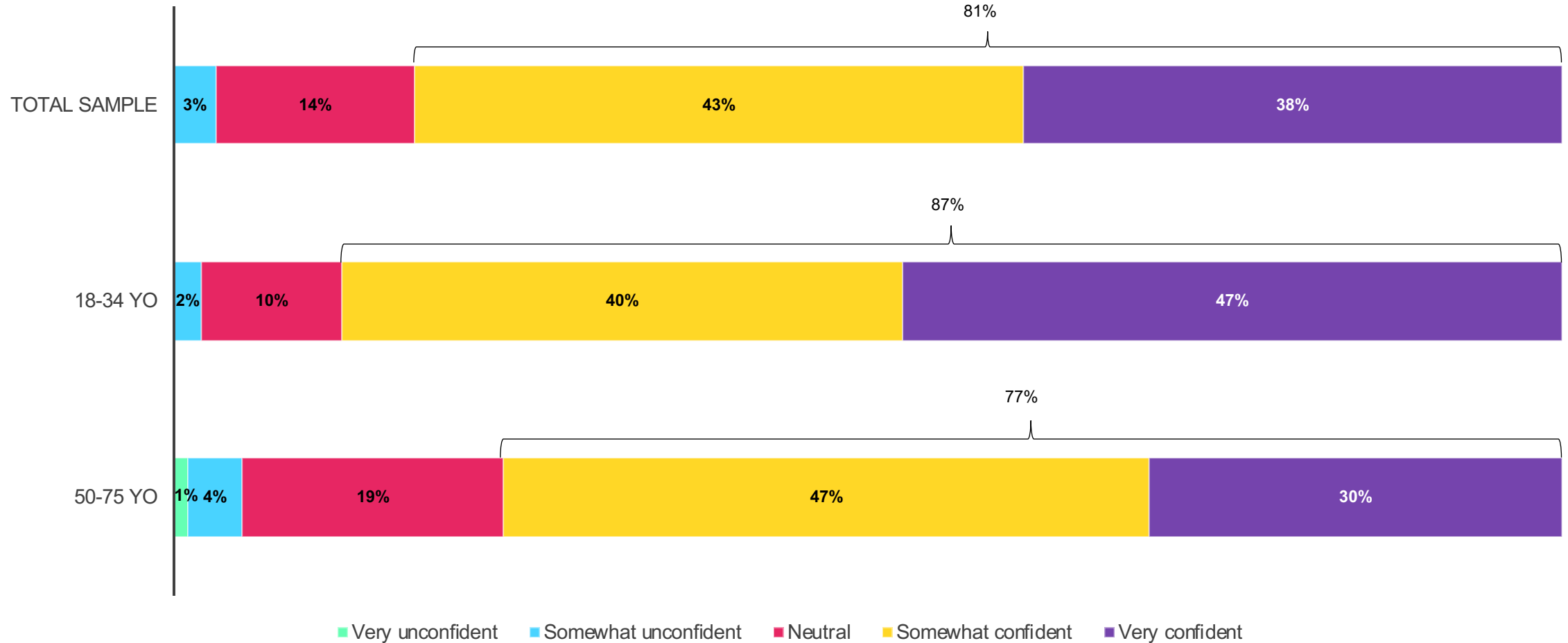
- ▶ Similarly, consumers 18-34 are also more inclined to check for software updates more often than 50-75 year-olds are.



Q4. How often do you check for, and update, your security software on your connected device?
Base: Total Sample (n=1000) Total 18-34 YO (n=500), Total 50-75 YO (n=500)

Confidence in Security of Devices

- ▶ Older respondents feel less confident in the security of the connected devices in their home than average, while nearly half of 18-34 year-olds are very confident.



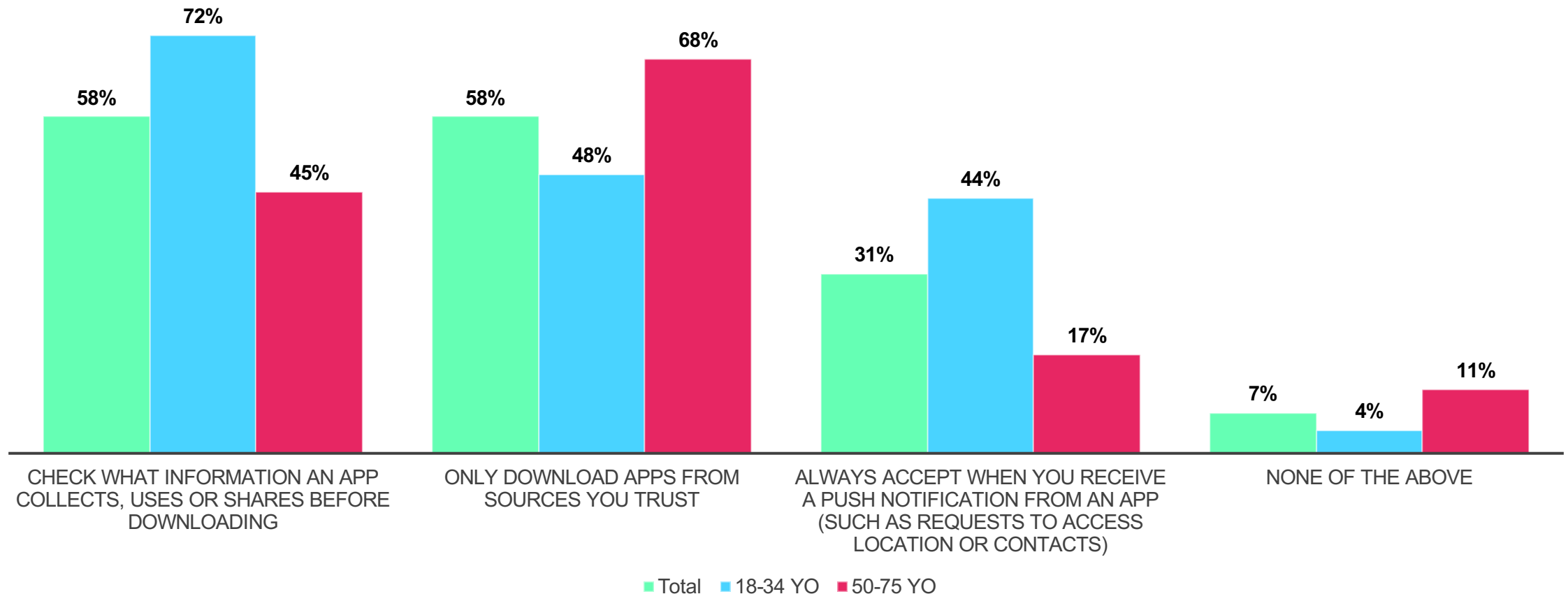
Q5. How confident are you in the security of the connected devices you have in your home?

Base: Total Sample (n=1000) Total 18-34 YO (n=500), Total 50-75 YO (n=500)

*Total Sample and 18-34 YO have 0% for "very unconfident" which is not shown.

Using/Downloading an App

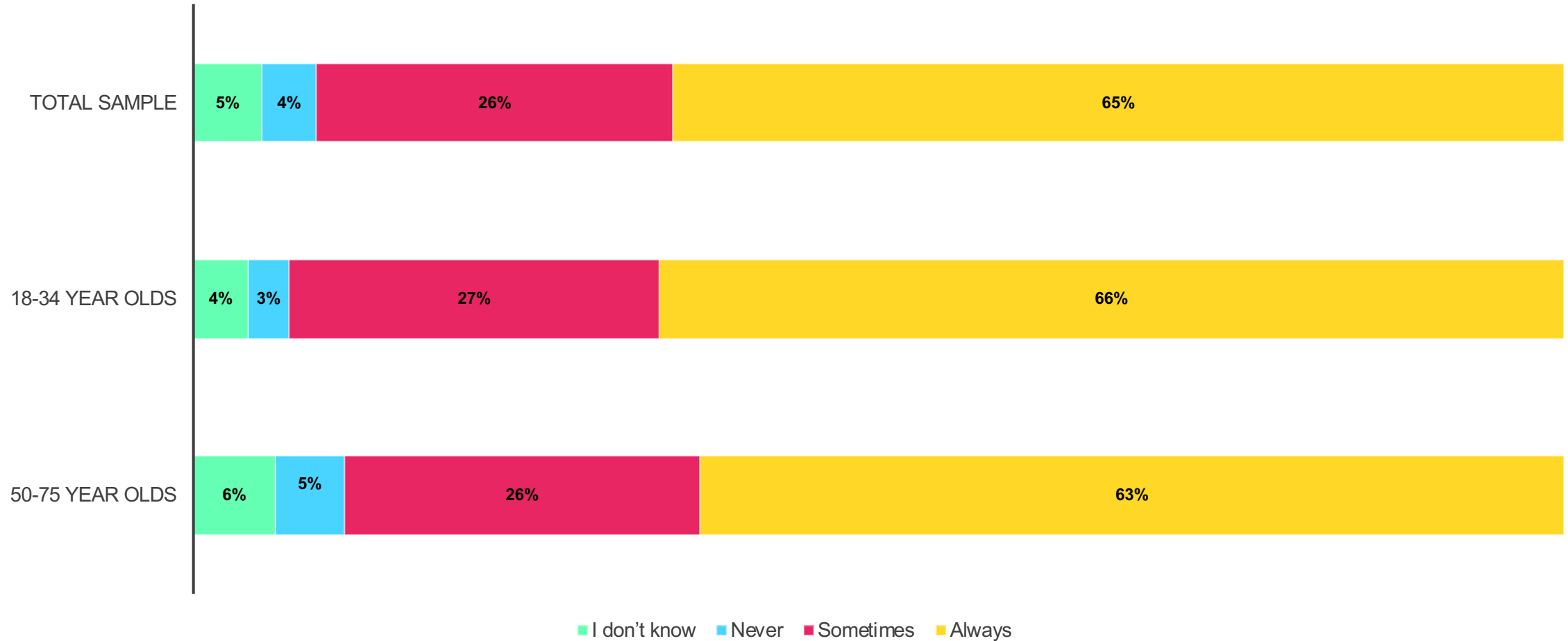
- ▶ 18-34-year-olds are more likely to check what information an app collects and uses before downloading it, while 50-75 year-olds say they only download apps from sources they trust.
- ▶ 44% of **younger adults also say they *always* accept when they receive a push notification** on an app, while merely 17% of older respondents do the same.



Q6. Have you ever done the following as it relates to using or downloading an app on your smartphone, tablet, smartwatch, or smart tv?
Base: Total Sample (n=1000) Total 18-34 YO (n=500), Total 50-75 YO (n=500)

Change Default Password

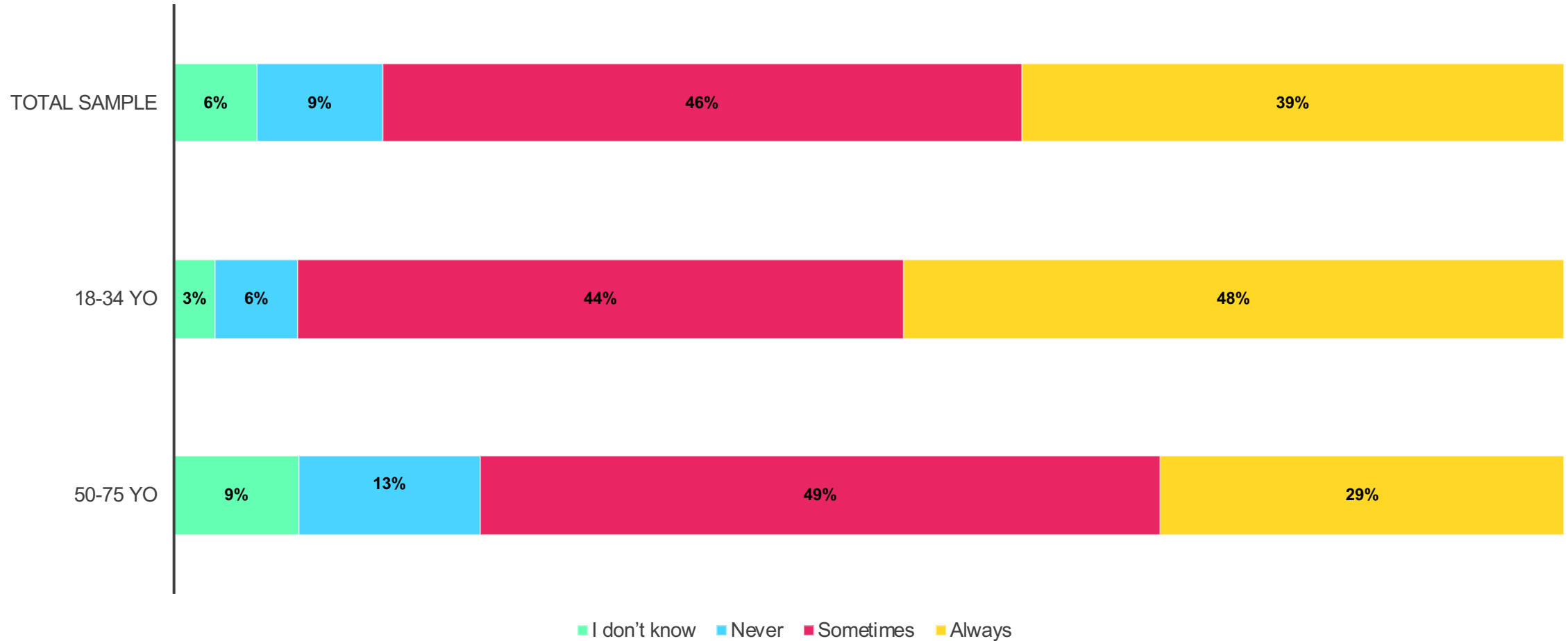
- ▶ Nearly two-thirds of all respondents say they always change the default password upon activating a new connected device.



Q7. Upon activating a new connected device, do you change the default password settings provided by the device manufacturers?
Base: Total Sample (n=1000) Total 18-34 YO (n=500), Total 50-75 YO (n=500)

Deactivation of Features

- ▶ Almost half of all 18-34 year-olds say they **always** deactivate any unnecessary features built into the product after purchasing. Only 29% of 50-75 year-olds do the same.

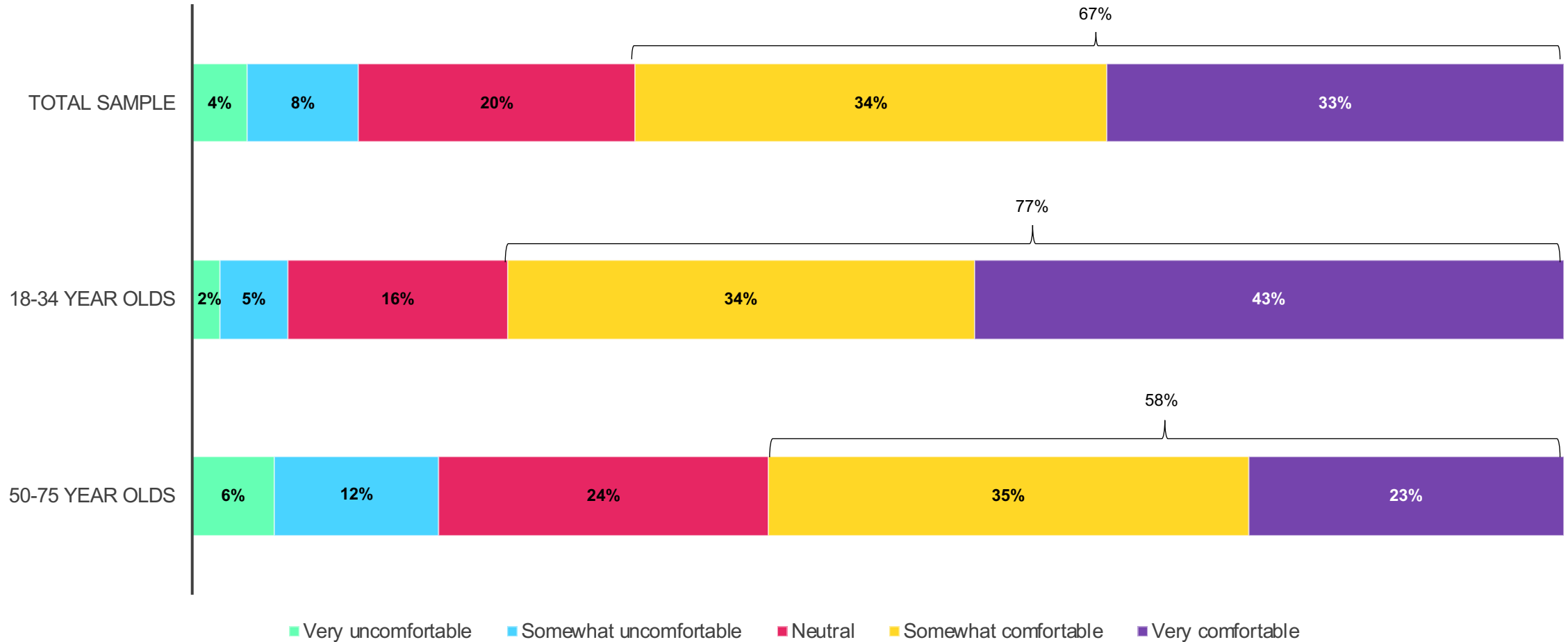


Q8. After purchasing a new connected device, do you intentionally deactivate any unnecessary features the manufacturers built into the product (such as location tracking or data sharing)?

Base: Total Sample (n=1000) Total 18-34 YO (n=500), Total 50-75 YO (n=500)

Cloud Storage

- ▶ Younger respondents are much more comfortable with keeping their data backed up on a cloud storage service than older respondents are – 43% of 18-34 year-olds say they are very comfortable.



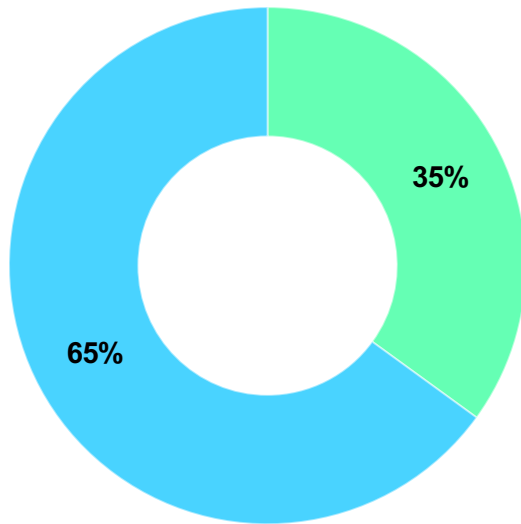
Q9. How comfortable are you with keeping the data from your connected device backed up on a cloud storage service such as iCloud or Google Drive?

Base: Total Sample (n=1000) Total 18-34 YO (n=500), Total 50-75 YO (n=500)

WFH

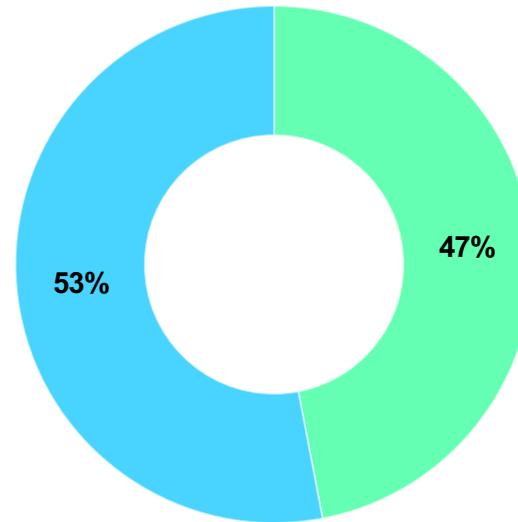
- ▶ Currently, almost half of 18-34 year-olds are working from home due to Covid-19 office closures, while only 22% of 50-75 year-olds are working form home.

Total Sample



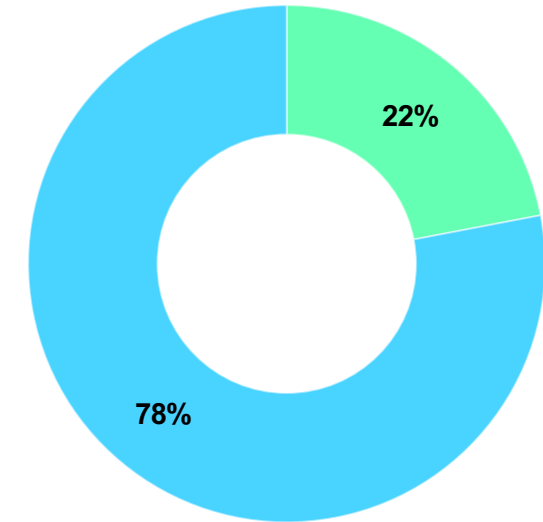
■ Yes ■ No

18-34 YO



■ Yes ■ No

50-75 YO

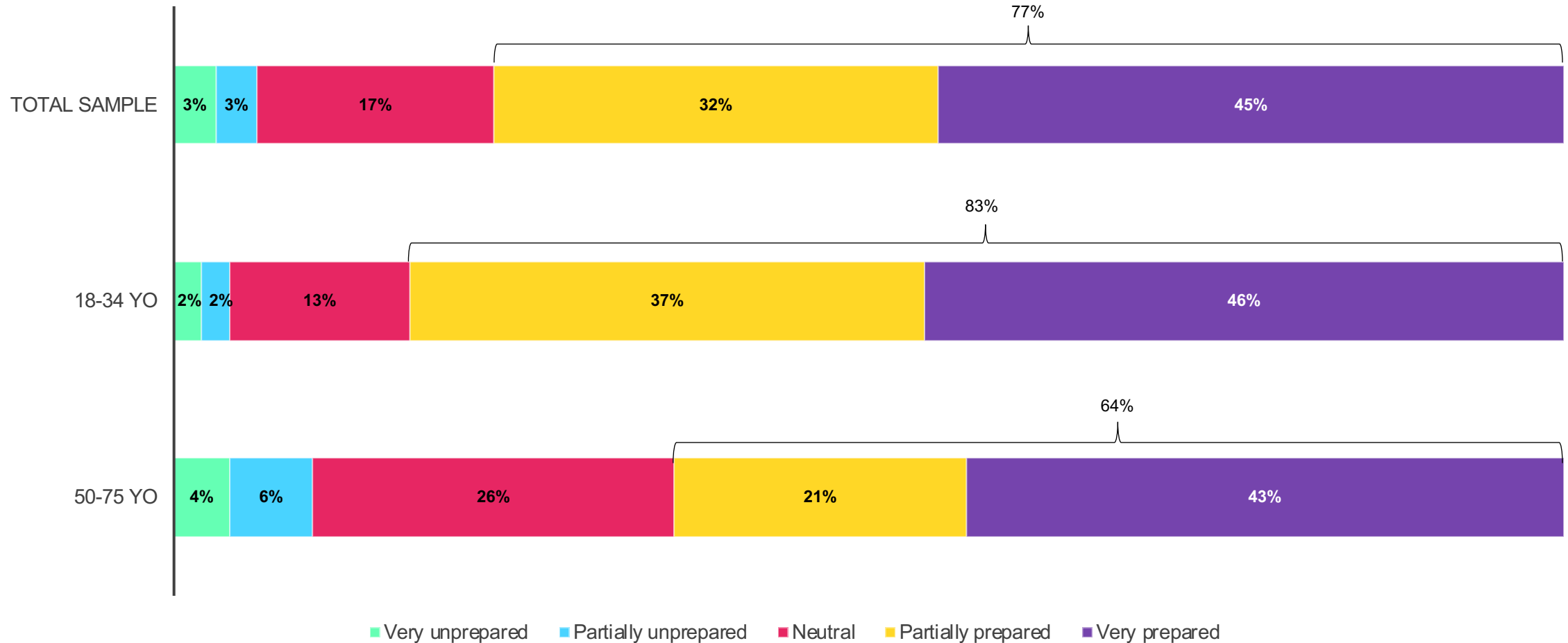


■ Yes ■ No

Q10. Are you currently working from home (WFH) in any capacity as a result of Covid-19 office closures?
Base: Total Sample (n=1000) Total 18-34 YO (n=500), Total 50-75 YO (n=500)

IT Preparation

- ▶ Fewer older respondents feel that their company's IT policy prepared them for securely accessing data and assets remotely before switching to a WFH arrangement.

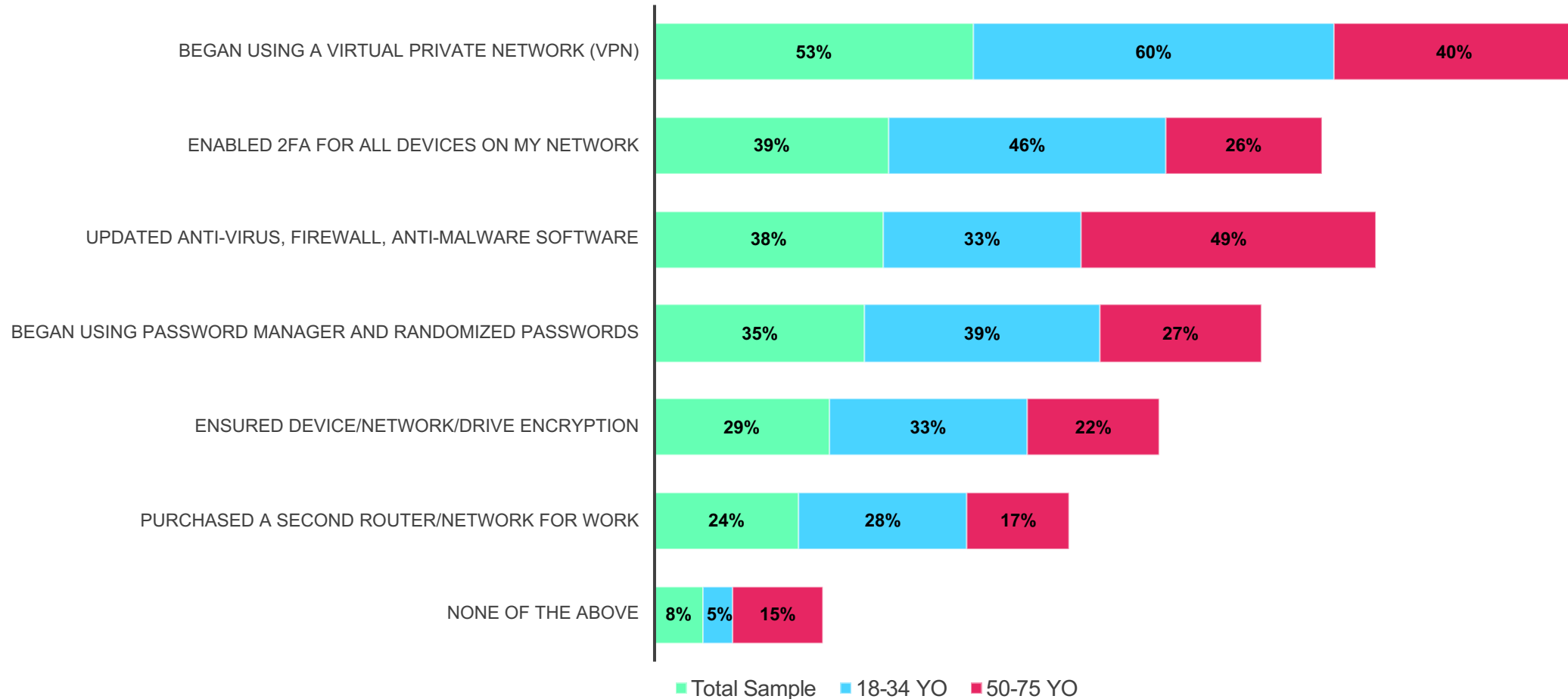


Q11. Before switching to a WFH arrangement, how well did your company's IT policy prepare you for securely accessing your organization's data and assets remotely (e.g. providing Virtual Private Networks (VPNs), separate work devices)?

Base: Respondents Working from Home (n=347), 18-34 YO WFH (n=235), 50-75 YO WFH (n=112)

Personal Security Precautions

- ▶ **Half of all 50-75 year-olds say they made sure to update anti-virus and firewall software to ensure better security while working from home, much higher than average.**



Q12. What precautions have you personally taken to ensure better security measures for connected devices while working from home?
Base: Respondents Working from Home (n=347) 18-34 YO WFH (n=235), 50-75 YO WFH (n=112)

Frequency of Public WiFi Use

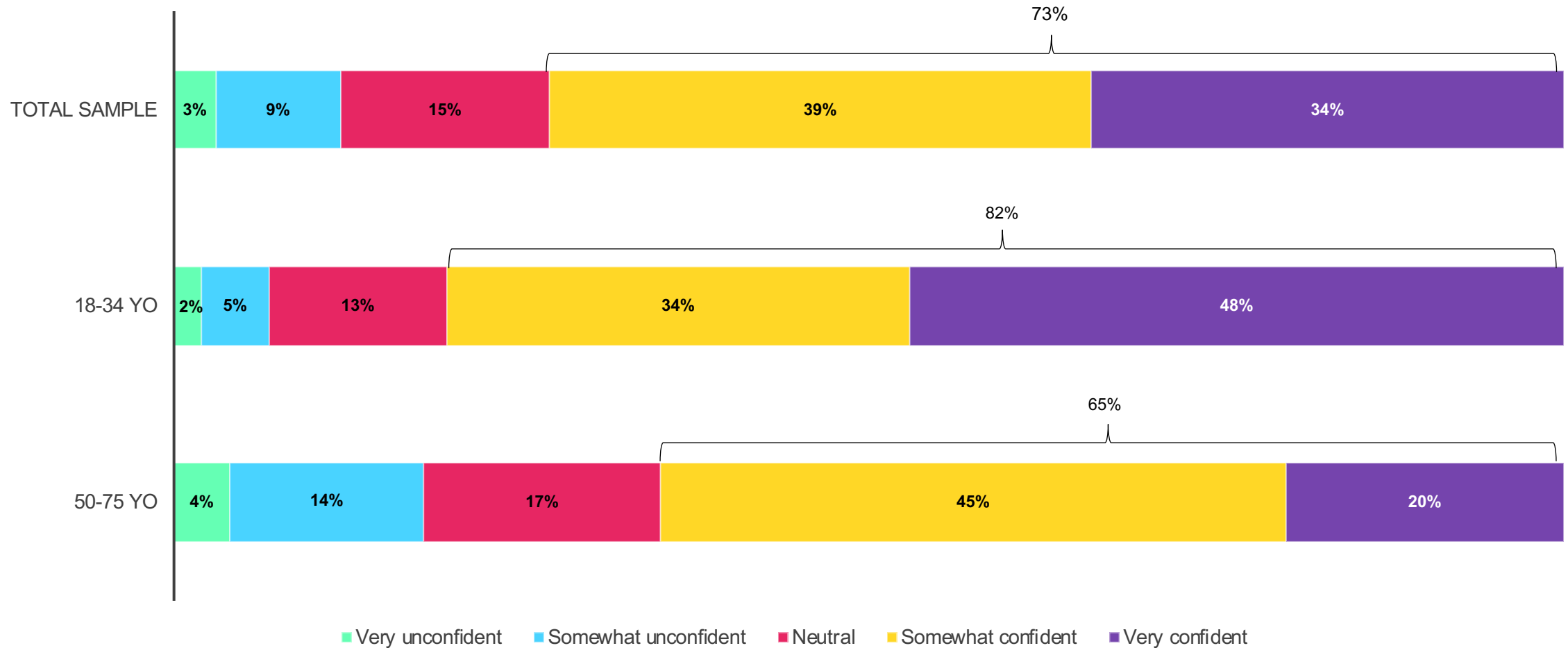
- ▶ 55-75 year-olds seem to be more risk averse when considering using public WiFi – 42% never use it. 18-34 year-olds, however use it more often (54% T2B)



Q13. How frequently do you use a public WiFi network to access company servers/data, banking/financial information or email through connected devices?
Base: Total Sample (n=1000) Total 18-34 YO (n=500), Total 50-75 YO (n=500)

Confidence in Identifying Malicious Intent

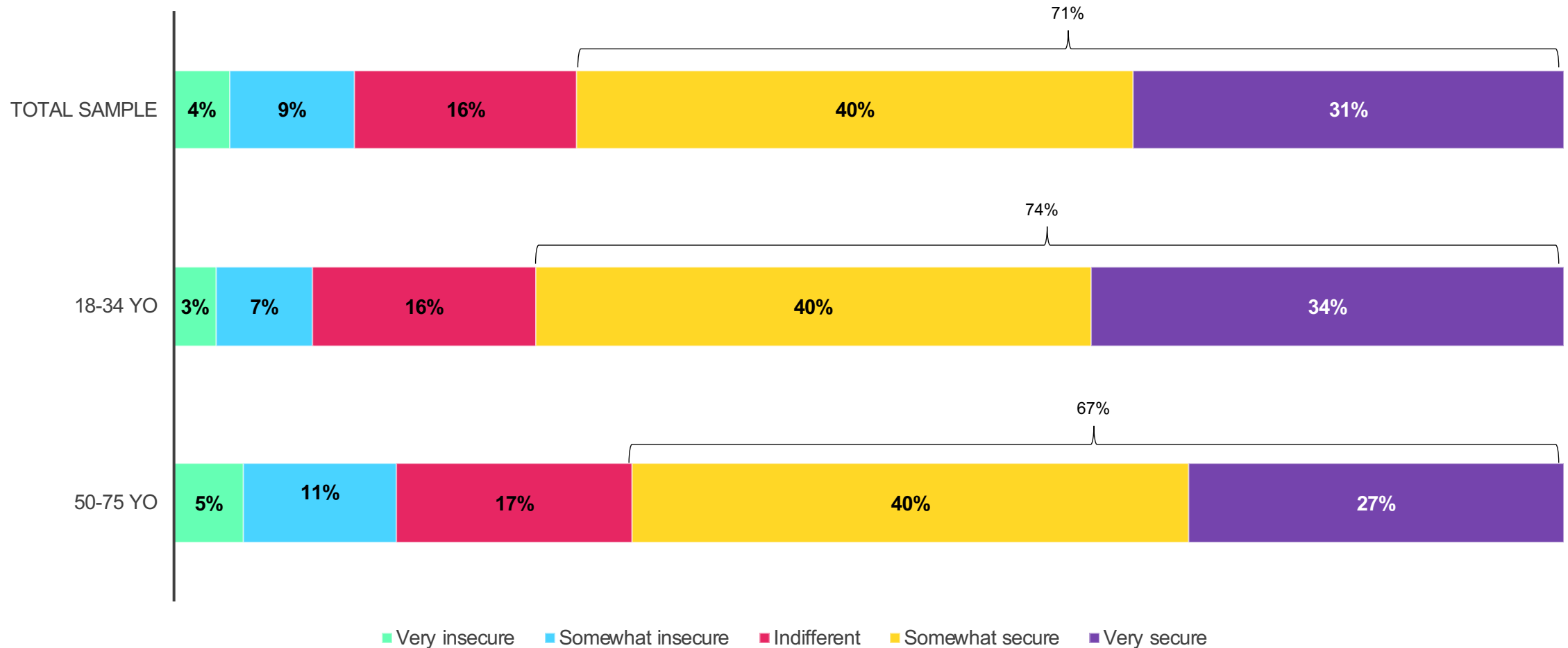
- ▶ Only 20% of older respondents feel very confident in their ability to identify a malicious email or link, while almost half of 18-34 year-olds feel very confident.



Q14. How confident do you feel about your ability to identify a malicious/illegitimate email or link from a cyber criminal?
Base: Total Sample (n=1000) Total 18-34 YO (n=500), Total 50-75 YO (n=500)

Security in Telemedicine Services

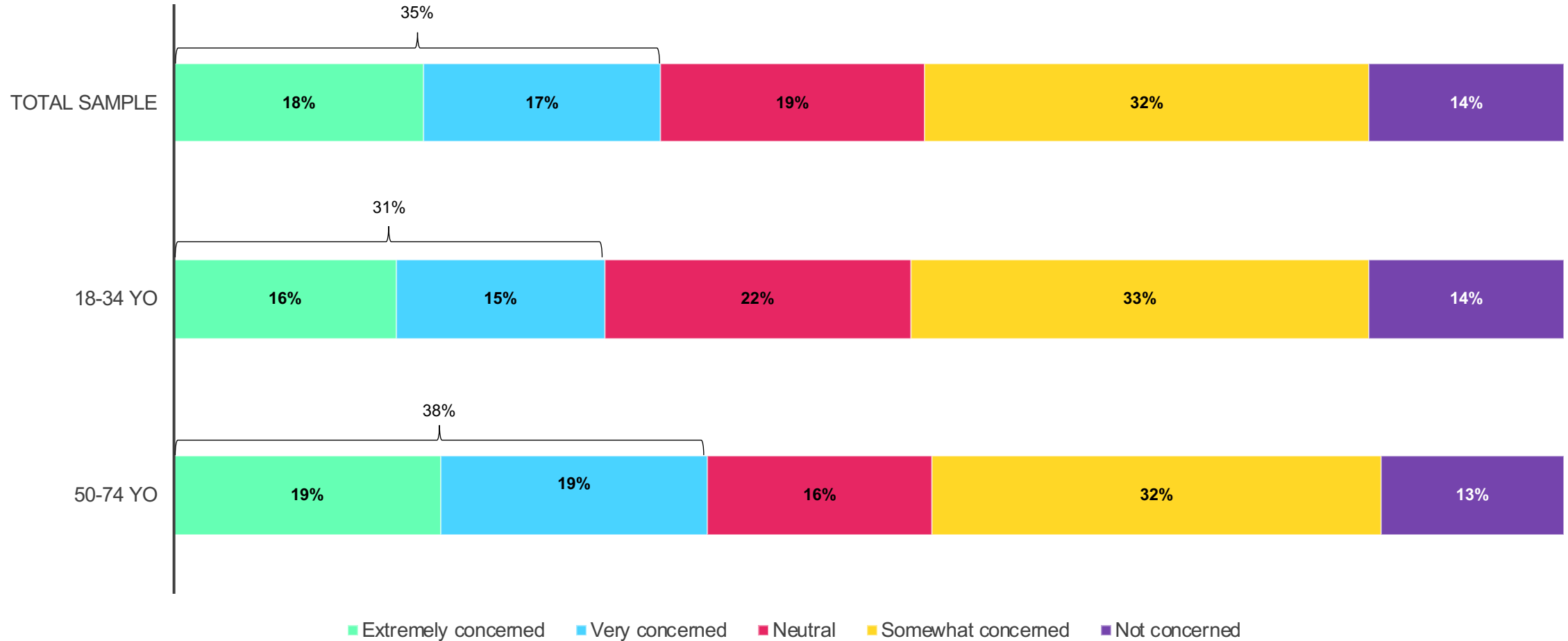
- ▶ Both age groups feel similarly about how secure they would feel using telemedicine services for medical needs—**only 31% of all respondents feel very secure.**



Q15) Use of telemedicine, the remote diagnosis and treatment of patients by means of telecommunications technology, has soared since the pandemic began. How secure would you feel using telemedicine services for your medical needs and consultations?
Base: Total Sample (n=1000) Total 18-34 YO (n=500), Total 50-75 YO (n=500)

Concern in Digital Contact Tracing

- ▶ On average, **32%** are somewhat concerned about digital contact tracing and both age groups feel nearly the same about it.

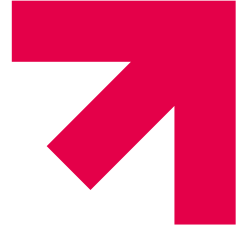


Q16) Digital contact tracing helps health authorities trace Coronavirus infection through users' smartphones, alerting people that they've been near a person infected by COVID-19. How concerned are you that these tools could compromise your privacy or personal data, during use?

Base: Total Sample (n=1000) Total 18-34 YO (n=500), Total 50-75 YO (n=500)

Appendix

Demographics



Gender	
Female	50%
Male	50%

Age	
18-34	50%
50-75	50%

Region	
Northeast	17%
Midwest	20%
South	46%
West	17%

Household Income	
Under \$30,000	32%
\$30,000 - \$49,999	22%
\$50,000 - \$74,999	19%
\$75,000 - \$99,999	10%
\$100,000 - \$149,999	10%
\$150,000+	5%
Prefer not to say	2%



About The National Cyber Security Alliance

NCSA is the nation's leading nonprofit, public-private partnership promoting cybersecurity and privacy education and awareness. NCSA works with a broad array of stakeholders in government, industry and civil society. NCSA's primary partners are the Department of Homeland Security's Cybersecurity and Infrastructure Security Agency and NCSA's Board of Directors. NCSA's core efforts include National Cyber Security Awareness Month (October); Data Privacy Day (Jan. 28); and CyberSecure My Business™. For more information on NCSA and its board members, please visit <https://staysafeonline.org/about/>.

NCSA is also a leading partner for the STOP. THINK. CONNECT™ campaign, the global online safety awareness campaign created to help all digital citizens stay safer and more secure online. The message was created by an unprecedented coalition of private companies, non-profits and government organizations with leadership provided by the NCSA, the U.S. Department of Homeland Security and the Anti-Phishing Working Group. Please visit www.cisa.gov/stopthinkconnect, or www.stopthinkconnect.org for more information.

