

# Global Internet User Survey Summary Report

## Background

The Internet Society is a trusted independent source of leadership for Internet policy, technology standards, and future development. More than simply advancing technology, we work to ensure the Internet continues to grow and evolve as a platform for innovation, economic development, and social progress for people around the world.

The Global Internet User Survey (GIUS) is a globally scoped survey developed by the Internet Society to provide reliable information relevant to issues important to the Internet's future. As an ongoing effort, the survey informs and supports the activities of the global Internet Society community. While other ICT surveys focus on economic, infrastructure, or other Internet use indicators, the GIUS focuses on users, which are the source of innovation that has driven the Internet's development, evolution and dramatic growth over the past four decades.

In 2012 the GIUS interviewed more than 10,000 Internet users in 20 countries. This report is intended to provide a general overview of the behaviors and opinions reported by Internet users on various topics. Thus, the data and this report aim to represent the views of the users surveyed rather than the positions or views of the Internet Society, or its global community.

The 2012 GUIS was conducted for the Internet Society by Redshift Research, a leading business market research firm. This report summarizes the global findings from the 2012 Global Internet User Survey. More information, further analysis, and the full data set from the 2012 GIUS are available at:

<http://www.internetsociety.org/survey>

## Methodology

The 2012 Global Internet User Survey was conducted via online panels comprised of a total of 10,789 Internet users across 20 countries. Because of differences in sample sizes, the margins of error in the results for each country vary between 3.10% and a 4.38% at the 95% confidence level. Further demographic information can be found in the tabular data summary available at: <http://www.internetsociety.org/survey>

Country	Respondents *
United States	1040
Argentina	521
Brazil	515
Chile	508
Peru	510
France	510
Germany	519
Italy	552
Poland	508
Russia	513
Spain	506
Kenya	510
Saudi Arabia	506
South Africa	502
UAE	482
China	508
India	535
Indonesia	512
Philippines	521
South Korea	511

The questionnaire was administered in the language of each country. Its length varied depending on the language, averaging 25 minutes.

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\* Sample sizes for each country were established based on the penetration of Internet usage, each country's population, target confidence levels, as well as considerations such as available time.

## Key Findings

The 2012 Global Internet User Survey focused on issues such as of how users accessed the Internet, what applications they used, how they managed their personal information online, the Internet's relationship to human rights, and the effect of government regulation on the Internet. Key findings from this year's survey cover a broad range of topics.

### Internet Usage

- Internet users nearly universally (96 percent) indicated they accessed the Internet at least once a day.
- More than 90 percent of Internet users surveyed globally indicated they use social media, with a majority (60 percent) using it daily, an increase of 10 percent over 2011.
- Connection speed (73 percent) and reliability (69 percent) ranked slightly above more affordable monthly fees (68 percent) among factors that would increase usage. Other factors included more content in their local language (50 percent) and more online availability of government and/or community services (49 percent).

### Attitudes towards the Internet

- Ninety-eight percent of users agreed or strongly agreed the Internet is essential for their access to knowledge and education.
- More than 80 percent agreed or agreed strongly that the Internet plays a positive role for their individual lives as well as society at large.
- Nearly 75 percent of users strongly agreed that access to the Internet allows them to seek any information that interests them.

### The Internet and economic and societal issues

- Nearly two-thirds of respondents agreed or agreed strongly that the Internet would play a significant role in solving global problems, including reducing child mortality (63 percent), improving maternal health (65 percent), eliminating extreme poverty and hunger (61 percent), and preventing the trafficking of women and children (69 percent).
- An even higher percentage of respondents agreed or agreed strongly that the Internet would increase global trade and economic relationships (81 percent), improve the quality of education (80 percent), and improve emergency response during a natural disaster (77 percent).
- A majority of respondents felt strongly that the Internet plays a significant role in making improvements to business, science, and technology in areas such as: expanding the availability of goods and services (66 percent), allowing entrepreneurs to conduct business across all countries (65 percent), and advancing science and technology and creating a technologically recognized workforce (61 percent).

## **The Internet and Human Rights**

- Eighty-three percent of respondents agreed or agreed strongly that access to the Internet should be considered a basic human right.
- Eighty-nine percent agreed or agreed strongly that Internet access allows freedom of expression on all subjects, and 86 percent agreed or agreed strongly that freedom of expression should be guaranteed.
- Sixty percent of respondents agreed or agreed strongly that Internet access has contributed significantly to civil action and political awareness in their country

## **Internet censorship**

- Thirty percent of users agreed strongly that censorship currently exists on the Internet.
- Sixty-six percent of respondents agreed or agreed strongly that governments in countries with no Internet censorship have a responsibility to keep the Internet free of censorship in countries where the Internet is being censored/controlled/shut down.
- More than 70 percent of users agreed or agreed strongly that more government involvement would make the Internet too controlled or would limit content they can access.
- More than two-thirds agreed or agreed strongly that increased government control would inhibit the growth of the Internet and/or stifle innovation.

## **Online privacy and identity**

- 12 percent of respondents admitted that they never read privacy policies of websites or other services with which they share their personal data. Another 72% reported that they read privacy policies sometimes or most of the time. This means that, of this sample, more than 80% of users do not always read privacy policies even when they know they are sharing personal data with the site or service. Surprisingly, given the length and complexity of privacy policies for many popular sites, as many as 16% of respondents reported they always read the privacy policies. However, we do not know whether they read every clause and every word.
- Of those respondents who reported that they read privacy policies at least sometimes, less than 20% said they understood them completely. A relatively large percentage (46%) of respondents believes they understand them very well. Nonetheless, another large percentage (37%) only partially understand them or not at all.
- The principal reasons selected by respondents for why they do not read privacy policies were: too long; too many pages; insufficient time; no choice anyway; too many legal terms that they do not understand; too confusing; and a belief that the terms cannot be relied upon. Encouragingly, only a relatively small percentage of respondents (4%) selected “I can’t find them” as a reason for why they do not read the privacy policies.
- Encouragingly, the majority of users surveyed report that they are using some form of privacy protection at least some of the time, indicating some degree of privacy awareness.
- A vast majority (84%) of respondents reported that they have at some times restricted the access of websites and/or apps to their location data. Again, this suggests some level of

privacy awareness. However, only 47% of the respondents reported that they always use separate passwords for sensitive data, and only 13% said they never share permissions with family or friends.

- More than 50% of respondents give incorrect personal data when creating an account at least some of the time. But, a large percentage (44%) report they always provide correct personal data.
- A total of 19% of the respondents are aware of circumstances where their personal data was used in a way that they did not expect. This could be neutral, positive or negative. However, irrespective of whether the outcome was well received by the user, his or her expectations were not met on at least one occasion. The most commonly reported consequences were: unsolicited communications; personal data was “stolen”; previously private data became public; impersonation and financial loss.

## Summary

This report provides a summary of global responses to the 2012 Global Internet User Survey. Key themes and findings have been identified in areas such as Internet usage, the attitudes of users towards the Internet, users' views of the Internet's role in providing access to education and in supporting social action. The survey results also highlight the actions users take, or fail to take, in ensuring they understand they consequences of sharing personal data online and in protecting their online identity. Further analysis—for example exploring differences in responses across regions or countries—will be explored in future reports.

Internet users are the source of innovation that has driven the Internet's development, evolution and dramatic growth over the past four decades, and they will continue to do so. Indeed, as the Internet continues to grow and evolve, the 5 billion people not connected today will play a significant role in shaping its path going forward. As part of its efforts to serve as a trusted, independent source for information about key issues facing the future of Internet, the Internet Society undertakes the Global Internet User Survey to provide the diverse Internet community, including Internet Society members, policy makers, and technologists, reliable information relevant to issues important to the Internet's future.