

Position Paper

Switch to Security:
Mobile Consumer
Security Survey –
APAC 2020

August 2020



Table of Contents

Introduction.....	3
Consumer Awareness & Concerns	4
Security Threats in COVID-19 Era	5
Partial, Inconsistent Solutions	6
Consumers Trust CSPs to Provide Security.....	7
Summary	10
For More Information.....	11

Introduction

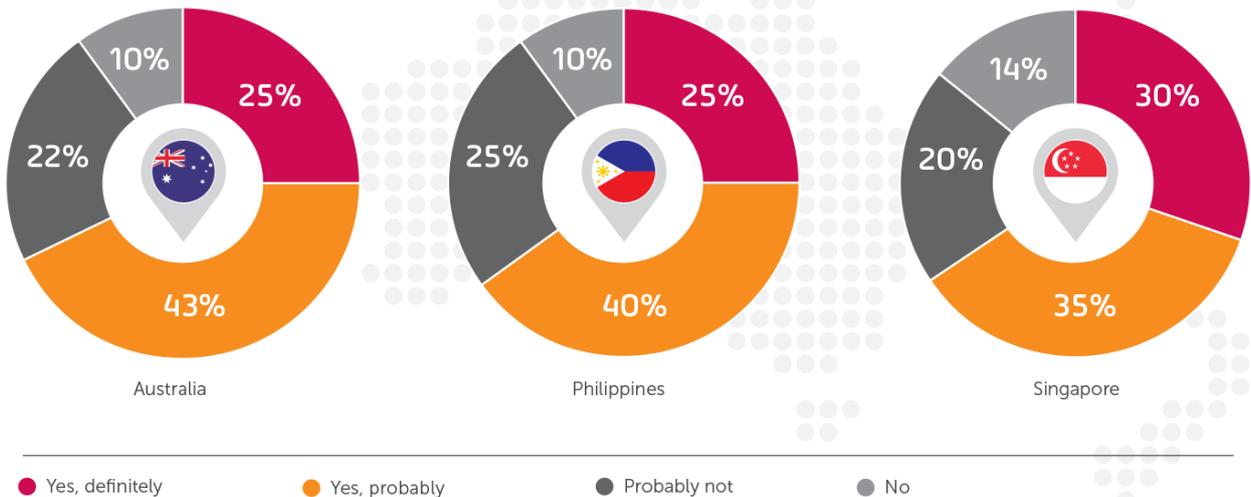
During June and July of 2020, Allot partnered with Coleman Parkes Research Group to survey 2500 mobile subscribers across APAC; Singapore (500), the Philippines (1000) and Australia (1000), and assess their cybersecurity awareness and behaviour.

The results show some interesting differences between the countries on singular items, but overall, mobile customers across the region showed high levels of awareness and concern about cybersecurity threat. Yet a general uncertainty about exactly which steps they should be taking to protect themselves prevailed, suggesting the market is far from mature. These results are in line with findings of a [US mobile consumers survey](#) published by Allot in July 2020.

A large proportion of surveyed consumers believe that their CSP should provide protection against online threats and expressed a willingness to pay an additional monthly fee for an easy-to-use solution that protects all their connected devices at home and on the go. 67% said security was so important to them, they would switch to a provider with a clear security offering.

67% of mobile customers said security was so important to them, they would switch to a provider with a clear security offering.

WOULD A CLEAR SECURITY SOLUTION MAKE YOU SWITCH PROVIDER?



Consumer Awareness & Concerns

Consumers are clearly very concerned about cybersecurity. The abundance of frightening press coverage about all types of threats have had a strong effect on the general public.

The survey showed that 40% have been, or suspect they have been, the victim of a cyberattack themselves in the last 12 months. An additional 26% know personally someone who was a victim in that time frame.

In addition, parents with school-aged children are also highly concerned about cyberbullying, exposure to offensive content, sharing private/sensitive information, using inappropriate mobile apps and the amount of screen time.

Threat is Everywhere

Mobile consumers assess their own cyber risk to be high, no matter where they are or how they are connecting to the internet. When asked to rank their top concerns in relation to hacked devices, 80% cited getting their mobile hacked while connected to the mobile network, 79% said their mobile being hacked via home router, 77% via connected home devices, and 74% worry about their mobile getting hacked while connected to public Wi-Fi. For parents, concerns about their children's devices ranged between 40-49%.

Home, Mobile and Public Wi-Fi

When asked explicitly where, or via which internet connections, consumers feel they most need security protection, the highest level of concern was for connection via the mobile network (41%), followed by the home router (34%), and finally public Wi-Fi (25%). Notably, mobile consumers in Singapore are more concerned about public Wi-Fi than their counterparts in Australia and the Philippines and less concerned about home router and mobile internet connections.

80% worry about their device getting hacked while connected to the mobile network

Security Threats in COVID-19 Era

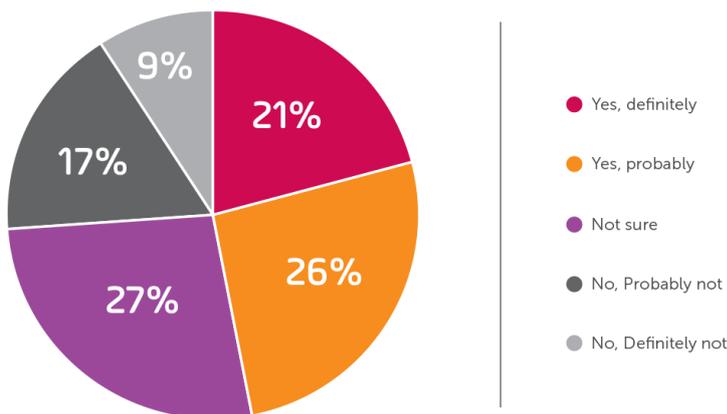
The COVID-19 crisis has contributed to a strong surge in cybercriminal activity. More time spent online and more people working from home and accessing business assets over unsecured connections is enough to increase the risk. Add to that the psychological effects of prolonged fear and uncertainty, and you have very fertile soil for all types of cyberattacks.

The global health crisis of the past few months has also heightened the perceived threat among mobile customers. When asked if they think the coronavirus era has brought with it an added cybersecurity risk, 47% answered 'yes', 27% were not sure, and 26% did not think the situation has changed.

47% of consumers think the coronavirus has increased cyberthreats

The global coronavirus crisis has had a powerful effect on the general population and has made them more aware of all kinds of threats and much more willing to take serious steps to protect themselves. Since April 2020, Allot Secure CSP customers around the world have experienced double-digit growth in their cybersecurity service adoption as customers become more concerned about cyber risks and turn to their CSP to provide trusted solutions.

DO YOU THINK THERE IS ADDED RISK OF SECURITY THREATS IN THE CORONAVIRUS ERA?



Partial, Inconsistent Solutions

Consumers aren't just concerned; they are ready to take action. 96% of survey respondents stated they have at least one type of security solution on at least one of their devices. 60% have an antivirus solution, 55% have an anti-malware solution, 49% have phishing protection, 47% block inappropriate content, and 42% have implemented a social media monitoring solution.

On the one hand, this shows that the consumer market is motivated to acquire cybersecurity protection. But it also paints a picture of incomplete and inconsistent solutions, where each user is on their own trying to figure out how to protect their devices. They have implemented partial solutions that cannot provide comprehensive protection against all threats, on all devices, no matter where or how they connect to the internet.

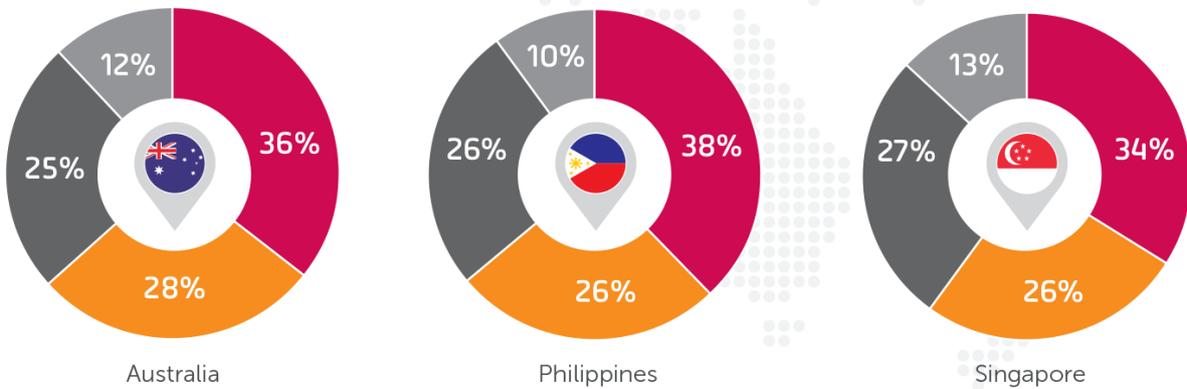
Consumers seem to take a 'set it and forget it' approach wherein they have a singular instance of concern and seek out a single solution, implement it, and then don't want to spend any further time or energy investigating additional solutions or updating the one they have.

Consumers Trust CSPs to Provide Security

Perhaps most interestingly, though not surprisingly, 89% of respondents in this survey said that their CSP should provide security solutions. This is a strong vote of confidence that customers trust the provider to deliver quality protection. 36% of those subscribers believe security should be provided as part of the bundle, showing many customers also *expect* the CSP to provide security solutions. Overall, the responses show strong preference for CSPs to take responsibility for securing the entire home and all devices in a simple manner that requires little or no technical involvement from the consumer. They want to leave security in the trusted, capable hands of the CSP.

89% said that their CSP should provide security solutions

SHOULD CSPs PROVIDE YOU WITH A SECURITY SOLUTION?



● Yes, as part of my bundle ● Yes, as an extra monthly fee ● Yes, as an extra one-off purchase fee ● No

Willingness to Pay

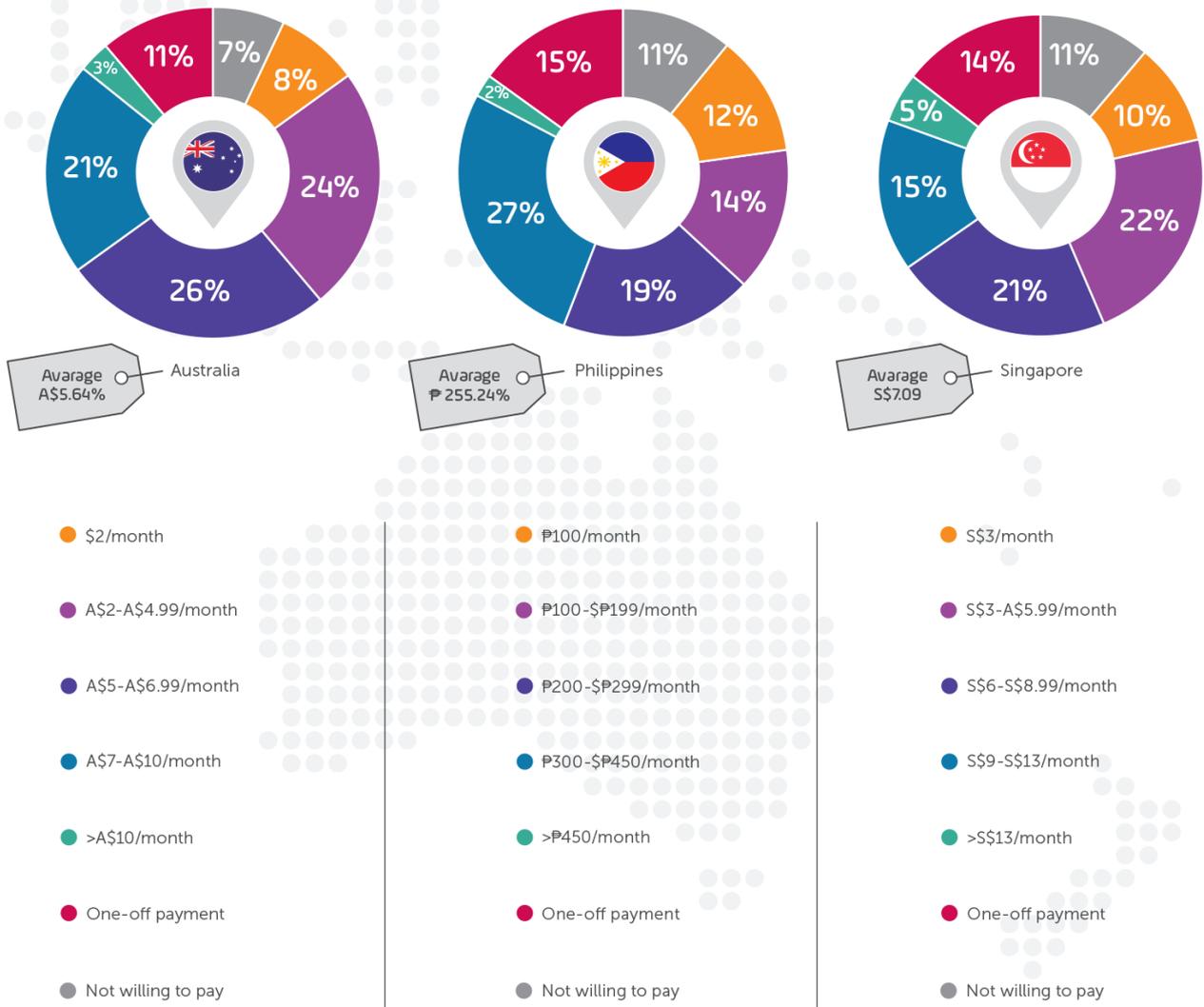
Taking it one step further, we asked mobile subscribers that had at least one security tool already installed, how much they would be willing to pay for a comprehensive, no-download, security solution provided by their mobile carrier. The responses show a large percentage are willing to pay for such a solution. 74% of Australian subscribers are willing to pay \$2-10 AUD (**\$4.05 USD** on average) per month. In the Philippines 84% are willing to pay over 100 PHP (**\$5.23 USD** on average) per month. In Singapore 63% of mobile subscribers are willing to pay \$3 SGD (**\$5.17 USD** on average) or more per month. In all three markets, many subscribers are willing to pay a much higher fee, indicating this is a highly desired and valued service.

Parental Concerns & Controls

Naturally, parents across APAC are highly concerned about their children's activity and safety online. 52% said that parental controls to monitor and protect their children online are important to them. They very clearly articulated the type of parental control features they desire, notably, limiting screen time and location updates (51%), child-in-distress alert (44%), and blocking inappropriate content and cyberbullying protection (41%). 80% of parents are willing to pay their CSP an additional \$3-5 USD on average, on top of their current monthly fee for parental control features.

80% of parents are willing to pay their CSP an additional \$3-5 USD or more for parental control features.

HOW MUCH WOULD YOU BE WILLING TO PAY YOUR MOBILE OR HOME NETWORK PROVIDER FOR A SPECIALISED PRE-INSTALLED NETWORK-BASED SECURITY SOLUTION/APP?



Summary

This survey reinforces that consumers are very concerned about cyberthreats and are willing to do something about it. But most consumers are not IT security professionals and selecting, implementing and maintaining reliable security tools for their home router and all their connected devices is therefore a challenging task. The many barriers to implementing a comprehensive solution leave most users at risk. The good news is that **80% of customers are willing to pay an additional monthly fee to take care of all their security needs from the network.**

At Allot, we help CSPs around the world increase ARPU and brand reputation by offering no-touch, network-based, security-as-a-service (SECaaS) solutions with parental controls.

Service providers are at a critical crossroads where they must decide if they are going to add security-as-a-service to differentiate their brand, or whether they will let a competitor take the lead. This APAC customer survey shows strong evidence that consumers, especially families with school-aged children, place a very high value on online safety and security and would gladly pay an additional monthly fee for a comprehensive, easy-to-manage solution and would even potentially change providers such a service.

Key Takeaways

- Mobile customers across APAC show high levels of awareness and concern about cybersecurity threats, yet a general uncertainty about exactly which steps they should be taking to protect themselves
- Consumers have implemented partial security solutions that cannot provide comprehensive protection against all threats, on all devices, no matter where or how they connect to the internet
- 67% of mobile customers said security was so important to them, they would switch to a provider with a clear security offering
- 80% are worried about their device getting hacked while connected to the mobile network
- 47% of consumers think the coronavirus has increased cyberthreats
- 89% said that their CSP should provide security solutions
- 80% of consumers are willing to pay an additional monthly fee to take care of all their security needs from the network
- 80% of parents are willing to pay their CSP an additional \$3-5 USD or more for parental control features.

For More Information

To learn more about Allot Network Security Solutions for Service Providers, download the Telco Security Trends Report:

[How Effective are CSP Security Services for the Mass Market?](#)

or watch this video: [How Allot NetworkSecure Works.](#)