

Position Paper

Switch to Security: Mobile Consumer Security Survey – Mexico 2020

September 2020



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Introduction

During June and July of 2020, Allot partnered with Coleman Parkes Research Group to survey 700 mobile subscribers across Mexico to assess their cybersecurity awareness and behavior. Overall, mobile customers across the country showed high levels of awareness and concern about cybersecurity threats. 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. 60% said security was so important to them, they would switch to a provider with a clear security offering.

6 out of 10 mobile customers would switch to a provider with a clear security offering.

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 46% have been, or suspect they have been, the victim of a cyberattack themselves in the last 12 months. An additional 24% know personally someone who was a victim in that time frame.

In addition, parents with school-aged children are also highly concerned about protecting devices used by children from malware and viruses and would like parental control features.

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, 81% cited getting their mobile hacked while connected to the mobile network, 81% said their mobile being hacked via home router, 82% via connected home devices, and 83% worry about their mobile getting hacked while connected to public Wi-Fi.

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 at home or office (39%), followed by the home router (32%), and finally public Wi-Fi (29%).

81% 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', 49% were not sure, and 4% did not think the situation has changed.

47% of consumers think the coronavirus has increased cyberthreats

COVID-19 has had a powerful effect on the entire 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.

Partial, Inconsistent Solutions

Consumers aren't just concerned; they are ready to take action. Roughly half of survey respondents stated they have at least one type of security solution on at least one of their devices. 54% have an antivirus solution, 49% have an anti-malware solution, 50% have phishing protection, 54% block inappropriate content, and 46% 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.

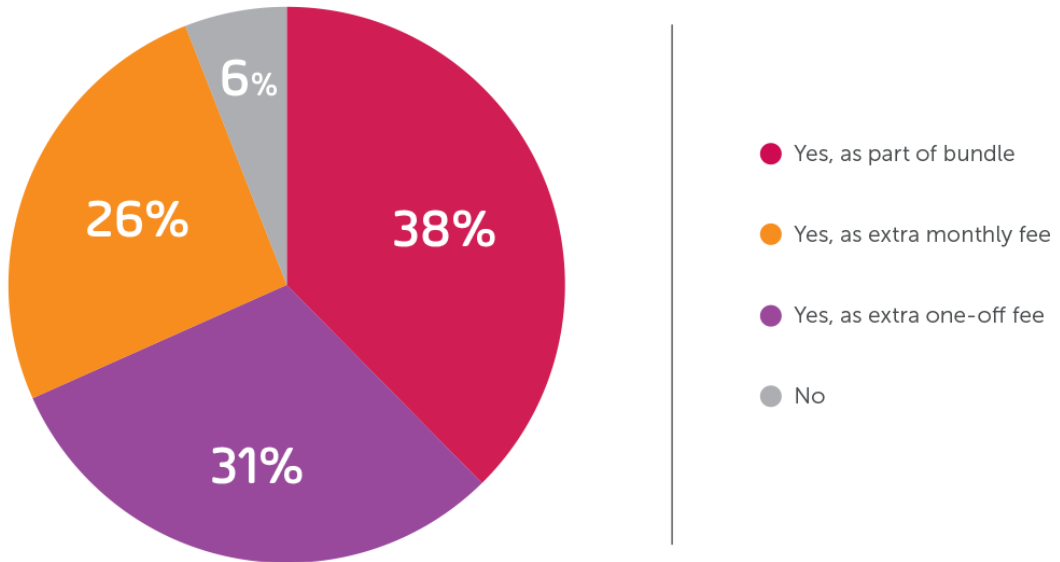
Consumers seem to take a 'set it and forget it' approach wherein they have a singular instance of concern and seek out a single solution, implement it, and then don't want to spend any further time or energy investigating additional solutions or updating the one they have.

Consumers Trust CSPs to Provide Security

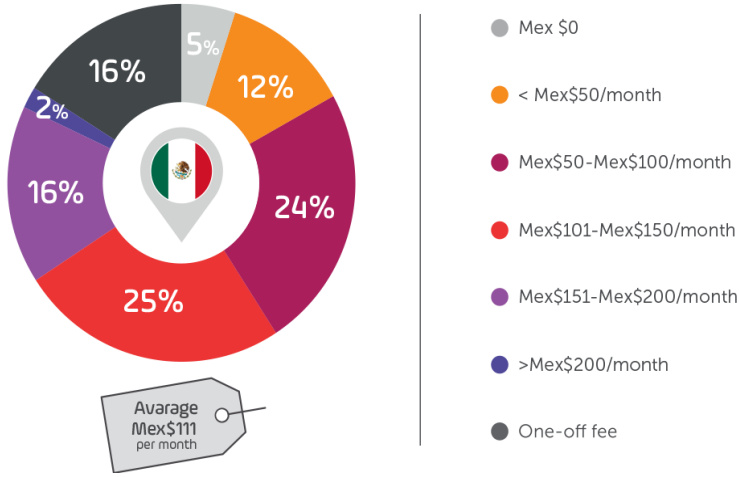
Perhaps most interestingly, though not surprisingly, 95% of respondents in this survey said that their service provider should provide security solutions. This is a strong vote of confidence that customers trust the provider to deliver quality protection. 38% of those subscribers believe security should 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.

95% said that their CSP should provide security solution

SHOULD YOUR CSPs PROVIDE A SECURITY SOLUTION?



WILLINGNESS TO PAY FOR COMPREHENSIVE, NETWORK-BASED SECURITY SOLUTION



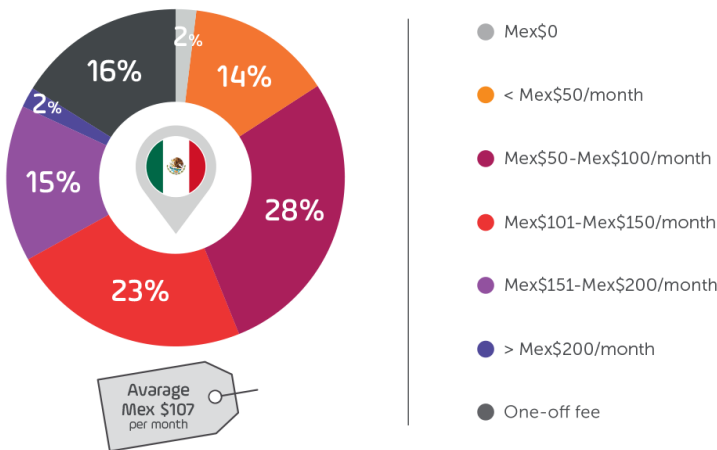
Willingness to Pay

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, hassle-free security solution provided by their mobile carrier. The responses show a large percentage are willing to pay for such a solution. 67% of Mexican subscribers are willing to pay an additional Mex\$50-200 (\$5.00 USD on average) per month.

Parental Concerns & Controls

Naturally, parents in Mexico are highly concerned about their children’s activity and safety only. 46% 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 (54%), location updates (59%), and blocking inappropriate content (55%) social media monitoring and cyberbullying protection (60%). 66% of parents are willing to pay their CSP an additional Mex\$50-200 on top of their current monthly fee for parental control features.

WILLINGNESS TO PAY FOR STRONG PARENTAL CONTROL FEATURES



60% of parents are willing to pay their CSP an additional Mex\$50-200 or more for parental control features.

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 **67% of customers are willing to pay an additional monthly fee (average Mex\$111) 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.

Mexican 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 Mexico 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

- Mexican mobile customers 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
- 81% are worried about their device getting hacked while connected to the mobile network
- 47% of consumers think the coronavirus has increased cyberthreats
- 95% said that their CSP should provide security solutions
- 67% of Mexican subscribers are willing to pay an additional Mex\$50-200 per month to their mobile provider to take care of all their security needs from the network
- 60% of parents are willing to pay their CSP an additional Mex\$50-200 or more for parental control features.
- **6 out of 10 of mobile customers said security was so important to them, they would switch to a provider with a clear security offering**

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.](#)