SECURITY FOR ALL: THE EVOLVING NEEDS OF MULTI-DEVICE CONSUMERS
Introduction

The worldwide use of Internet-enabled devices continues to increase. Better wireless networks, new devices with greater functionality, and connected lifestyles mean that many people now own and use a number of different devices to go online.

Our survey has tracked the trends in device use and protection over the last few years and the latest results, for 2015, reveal that when it comes to Internet security, consumers are only as secure as their most vulnerable device or online activity.

Awareness of risk and concern is increasing. But while there is growing recognition of the need to protect devices with an appropriate security solution, this awareness often doesn’t extend to apps, or to being prepared to pay for such security.

This could be because many consumers struggle to identify, find, install and use the right Internet security software. Others have misgivings about security software effectiveness and impact, or underestimate their personal exposure to threat, for example on a mobile device.

This short report summarizes some of these trends and considers what they mean for the Internet security solutions consumers really need in today’s rapidly-evolving, multi-device, connected world.

Main Findings

- People are using more devices and using them differently
  - Worldwide, the average household owned eight connected devices in 2015. These include such things as desktop PCs, laptops, tablets, smartphones, gaming devices, smart TVs, e-readers and more.
  - Mobile devices have replaced desktops as the device used most regularly for going online. 57% use a smartphone to access the Internet in 2015.
  - However, the overall trend is towards true multi-device use, with conventional PCs and laptops used alongside tablets and smartphones.
- People continue to worry about online threats, and are more confused about the security solutions that will protect them from such threats
  - 57% worry about their own or their family’s online activity in 2015, up from 54% in 2014 and 2013.
  - Only 58% of users understand how to use Internet security software in 2015, down from 65% in 2013.
  - 12% of those without security installed say they don’t know what software to install or where to get it.
  - 16% of those without security installed believe that antivirus/Internet security software will slow their computer down too much.
Methodology

The study was conducted online by research agency, B2B International in July 2015. A total of 11,819 people aged 16 and over from 27 countries were surveyed.

The data was weighted to be globally representative and consistent. Data from China has been removed from some of the global results due to its high overall weighting and marked difference in attitude and behaviour compared to most of the other geographies surveyed.

Not all the survey results have been included in this report. To find out more please contact Kaspersky Lab.

Section 1: Everyday device use in 2015

The age of the PC-only Internet user is drawing to a close. The results show that today’s connected lives are truly multi-device, with people relying to a greater or lesser extent (often depending on geography) on a blend of conventional and mobile devices.

The survey found that, worldwide, the average household now has 8 connected devices, including such things as desktop PCs, laptops, tablets, smartphones, gaming devices, smart TVs, e-readers and more.

All of these devices are used to go online, but the main device used for online browsing and activity is changing, as tablets appear to be losing out to larger and more sophisticated smartphones. In 2015, iPads are used for regular online browsing by 14% of respondents while over half (57%) say they regularly use their smartphone to go online.

These trends are seen worldwide, with some interesting regional variations. Consumers in Russia and the Asia-Pacific region prefer to go online using their mobile devices, while those in emerging markets like to use desktops and laptops in addition to their mobiles.
In more mature, developed markets such as Europe and North America, overall growth rates for any device appear to have levelled off, with ultra-lightweight laptops and larger smartphones cutting sharply into tablet user-share.

The variations in device use across the world are likely to be due to a number of factors, including culture, maturity of device market and quality of broadband and wireless networks. For example, the study shows that in emerging markets, the relative proportion of people relying solely on mobile devices is significant, and this reflects the fact that wireless networks are often more reliable and widespread than fixed broadband.

It should be noted however, that despite the growing trend towards going online using mobile, the study shows that in 2015 over a third (39%) of consumers worldwide regularly use a range of devices but continue to consider their desktop or laptop as their main device.

The world over, the rise in smartphone use is led by young people. 2015 saw an increase of 9% in the number of 16 to 24 year olds regularly using smartphones to go online, significantly higher than the 3% rise among 25 to 34 year olds.
Section 2: Attitudes towards security solutions in 2015

These connected devices are increasingly used to manage online activities and to store essential and private information. This makes them extremely attractive to thieves and cyber-attackers, offering an easy route to personal identities, financial credentials, private information and images, and more. Information that can be used, exposed, sold, and more. The only way to block many of these risks is by installing an appropriate security solution.

Our survey found however, that while a reassuring 93% of those surveyed claim to have installed some kind of security software on their desktop PC, and 91% have done the same for their laptop, the level of protection plummets for tablets and smartphones.

Twice as many people (65%) install security on an Android Tablet as do so for their iPad (32%), with Windows tablets leading the security field at 83% cover. Further, 60% say they have installed security software on their Android phone, falling to 44% for Windows phones and just 26% for iPhones.

What lies behind this apparent reluctance to install security software?

When asked why they had chosen not to install antivirus or Internet security software, consumer listed reasons that revealed widespread misperceptions and confusion. These attitudes could be leaving them exposed to online threats.
The reasons given included the idea that installing software would slow down their device too much (16%), or that security software is too expensive (11%) or not effective (8%). Others believe that being cautious is enough to keep them protected, saying that they only visit websites that they trust (16%).

A worrying 12% admit that they simply don’t know what software to install or where to get it from, up from 9% in 2014. Consumers aged between 35 and 44 years of age who have not installed any security software appear to be particularly confused, with just under one in five (18%) at a loss to identify the right product, up from 6% in 2014.

Further, the study shows that even when users have found an appropriate security solution, a growing number are struggling to understand how to install, configure and use it.

In 2015, only 58% of the people surveyed say that they understand how to use Internet security software, down from 65% in 2013.

Younger adults are more confident when it comes to security software, with around two-thirds of those aged under 34 understanding how to use security solutions, compared to around half (53%) of those aged 55 and older. In 2013, 62% of those aged over 55 felt able to get to grips with Internet security software.
There are a number of factors that could be influencing this trend. The cyberthreat landscape is becoming increasingly complex, with new and more advanced threats appearing constantly. Security solutions are evolving to address these new threats, and a possible side-effect of increasingly comprehensive protection could be increased product complexity, whether real or perceived.

This is all the more important because the survey reveals that the number of people who are worried about their own or their family’s use of the Internet at home remains significant and has increased slightly. Over half (57%) of those surveyed expressed this concern in 2015, compared with 54% in 2014 and 2013.

![Level of user concern, year to year](image)

However, there are signs that consumers are beginning to appreciate the need to secure all their connected devices, particularly tablets and smartphones.

The study shows that in 2015 two-thirds (66%) of people had heard of someone whose mobile device has been hit by a virus, up from 54% in 2013. In addition, the number of people who assume that mobile devices arrive with security already pre-installed is falling. In 2015, just 34% assume this, compared to 43% in 2013.

**Conclusion**

The study shows that the number of devices and device-based activities, such as app downloads, that need to be protected from risk is increasing.

Users have started to move away from mainly using PCs and laptops for online activities, towards a broader multi-device mix that also includes tablets and smartphones. In many cases, smartphones are becoming the device used most regularly to access the Internet.

Across the board, there is a growing understanding that these mobile devices are vulnerable to cyber-threats. This is an important realization: Android devices are the most widely used among consumers, and are also the top target for mobile threats.
Further, all these connected devices are used for online activities and users face risks and inconveniences that include junk messages, pop-ups as well as compromised websites and malicious software. Many are also used for work-related activities.

It is therefore unfortunate that many consumers say they struggle to find, install and use an appropriate Internet security solution. Security vendors need to listen to these concerns and help consumers to get the protection they need, ensuring that products are clear and easy to use.

Most of all, these products need to reflect today’s reality, which is that the world is multi-device and multi-platform. In any given home, conventional devices now live alongside, and are often networked with connected mobile devices. When it comes to protection in 2016, the mantra for the industry as well as for individual consumers should be exactly the same: to secure one you need to secure all.
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