



SmartLife Survey Highlights

Selected findings from Telenor Research's SmartLife
Survey

Feb 2020

Content of this slidedeck

Main topic	Sub-topics	No. Of slides
About the survey (slide 3)	Simple overview of countries, sample and data collection time and method	1
1. Privacy, personal data and security (slide 4-16)	Privacy concern	2
	Privacy knowledge	3
	Privacy actions	3
	Sharing personal data	3
	Security	1
	Google and Facebook – truly free?	1
2. Mobile data usage (slide 17-20)	Mobile data versus wi-fi	1
	What do people use data for on their phones?	1
	Commuting and phones	1
3. Trust, loyalty and satisfaction (slide 21-23)	Trust towards different players	1
	Customer satisfaction and loyalty	1



ABOUT Smart Life Survey 2019

In the following slides, the footnote in the lower end of each slide shows the number of total respondents per market denoted with 'N='.

In cases where sub-group of respondents are used in the charts, the size of that sub-group is provided in brackets in the footnote.

Countries:

- Norway, Sweden, Denmark, Finland, Malaysia and Pakistan

Sample:

- 6655 respondents (total)
- Age 18+
- Mobile internet users

Data collection:

- Q3 2019
- Web-panel



1

Privacy, personal data and security



Privacy concern

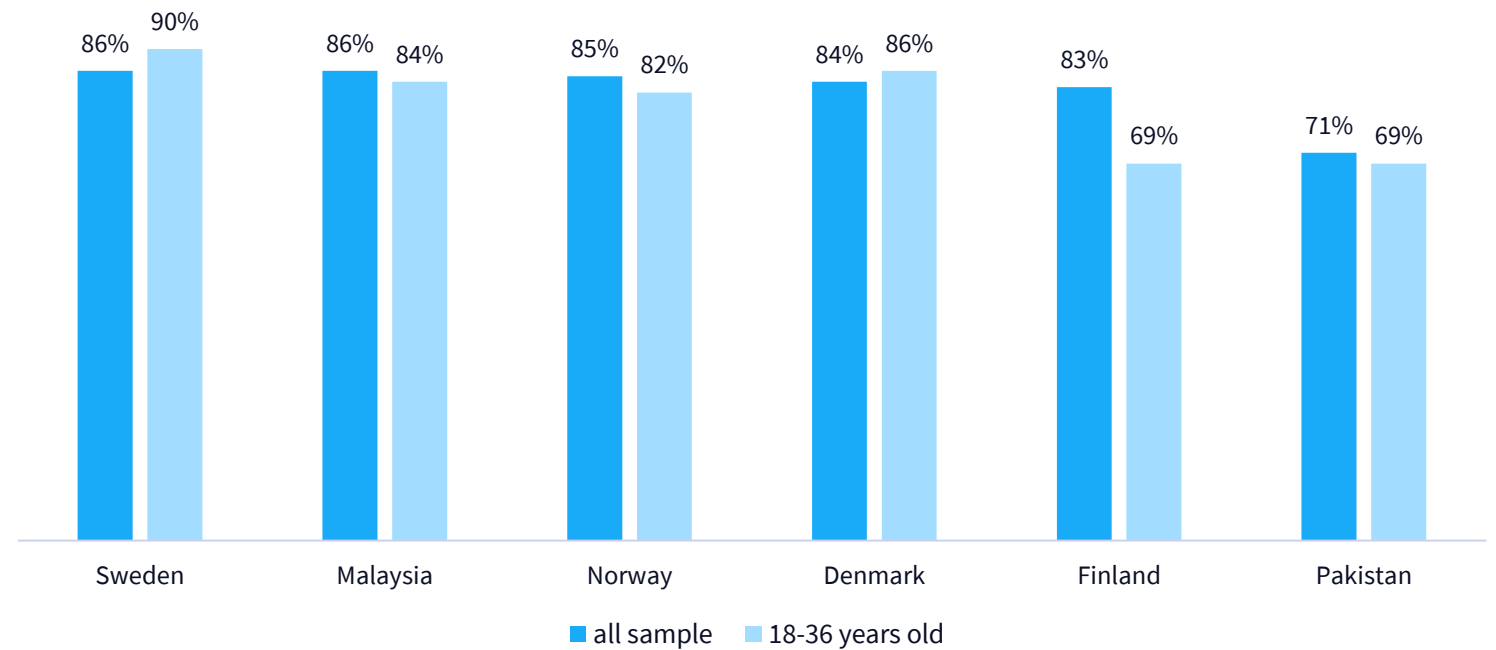
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Key take-aways

Overall, most mobile internet users are concerned about data privacy. This applies across the six markets.

However, **Finland** stands out with a considerable smaller share of privacy concerned respondents in the younger age bracket compared to the other mature markets. The younger Finns are on par with the mobile internet users in Pakistan.

Share of privacy concerned respondents based on the concern index calculated from their response to several survey questions. Total vs younger age group (%).



Source: Telenor Research, Smart Life Survey, 2019

Norway: N=1640 (516), Sweden: N=1004 (256), Denmark: N=1006 (339), Finland: N=1005 (298), Malaysia: N=1000 (527), Pakistan: N=1000 (764)



Privacy concern

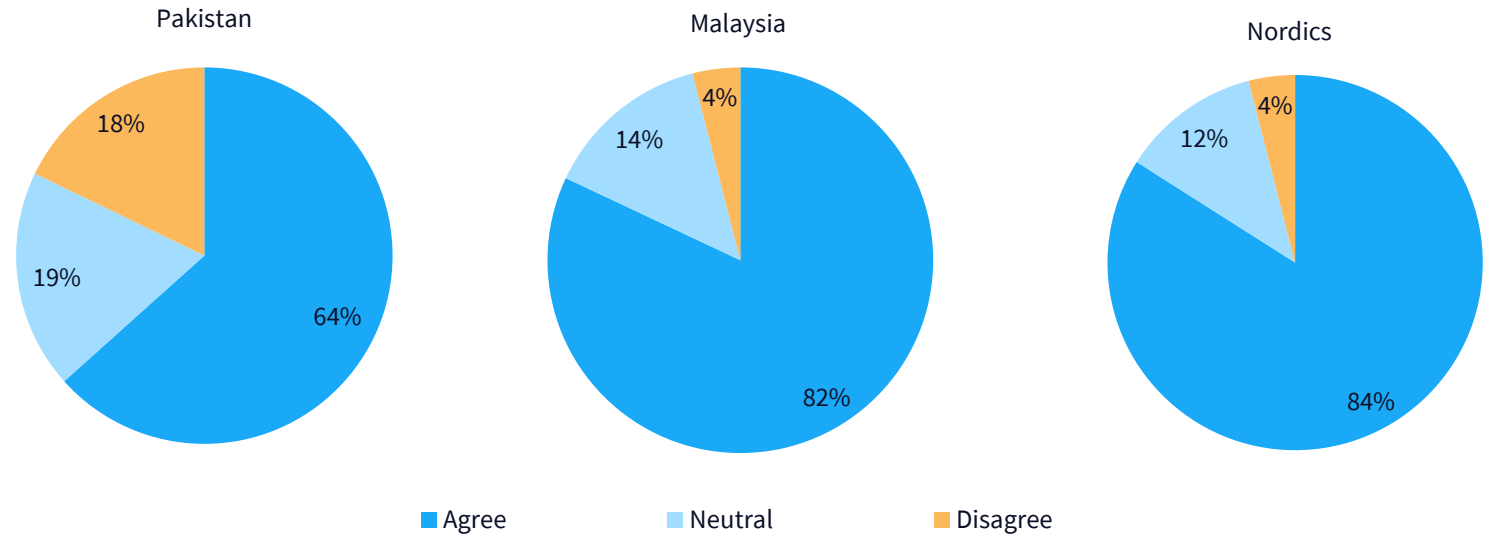
(2/2)

Key take-aways

The majority of mobile internet users are bothered by companies' practises of using personal information for other purposes than initially stated.

Yet, the share who feel bothered is considerable smaller in **Pakistan** than in Malaysia and the Nordics.

Survey question: *Do you agree or disagree: «It bothers me that personal information given to online companies for a specific purpose can be used for other purposes»?* (% share of respondents)



Source: Telenor Research, Smart Life Survey, 2019

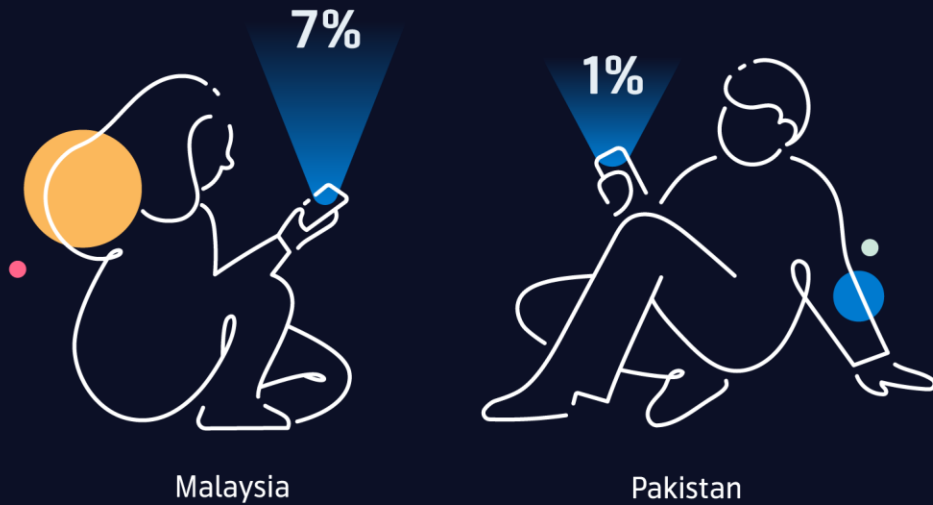
Norway: N=1640, Sweden: N=1004, Denmark: N=1006, Finland: N=1005, Malaysia: N=1000, Pakistan: N=1000



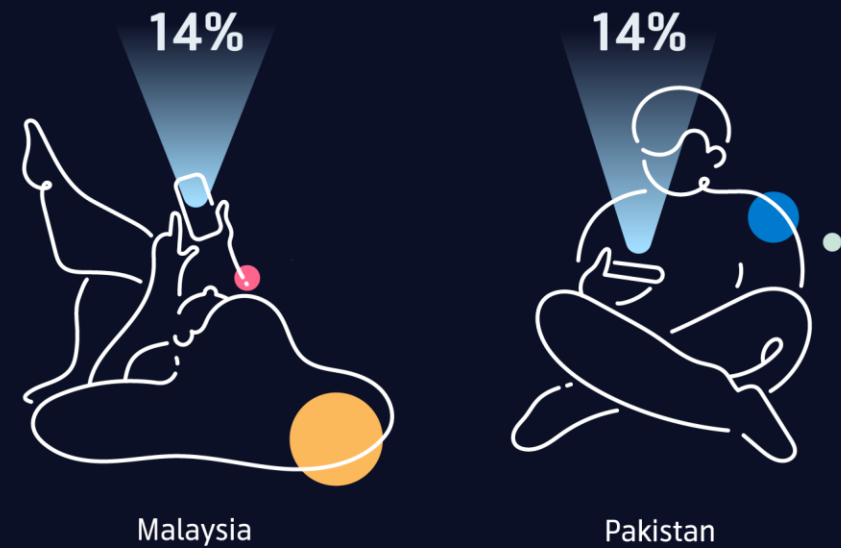
Privacy knowledge

Low among young people in both Malaysia and Pakistan but on the rise, especially the latter.

2017



2019



Age: 18-36

Telenor Research SmartLife Survey 2019

Privacy knowledge

(2/3)

Key take-away

What's known and less known about data privacy, tends to be the same for mobile internet users regardless market. Yet, there are some differences as shown in these two tables.

The privacy knowledge quiz consisted of 9 statements where some were true and others were false.

Easiest knowledge quiz question per market

*"Many mobile apps record your location"
True or false?*

Norway	92% got it right
Sweden	93% got it right
Finland	85% got it right
Pakistan	82% got it right

"Facebook, Google and other similar companies track your activity on the internet" True or false?

Denmark	92% got it right
Malaysia	84% got it right

Hardest knowledge quiz question per market

"Facebook, Google and other companies delete personal data after a predefined period" True or false?

Norway	92% got it right
Sweden	93% got it right
Finland	85% got it right
Pakistan	82% got it right

"When a mobile app has a privacy policy it means that no personal data is shared with other apps or companies" True or false?

Denmark	92% got it right
Malaysia	84% got it right

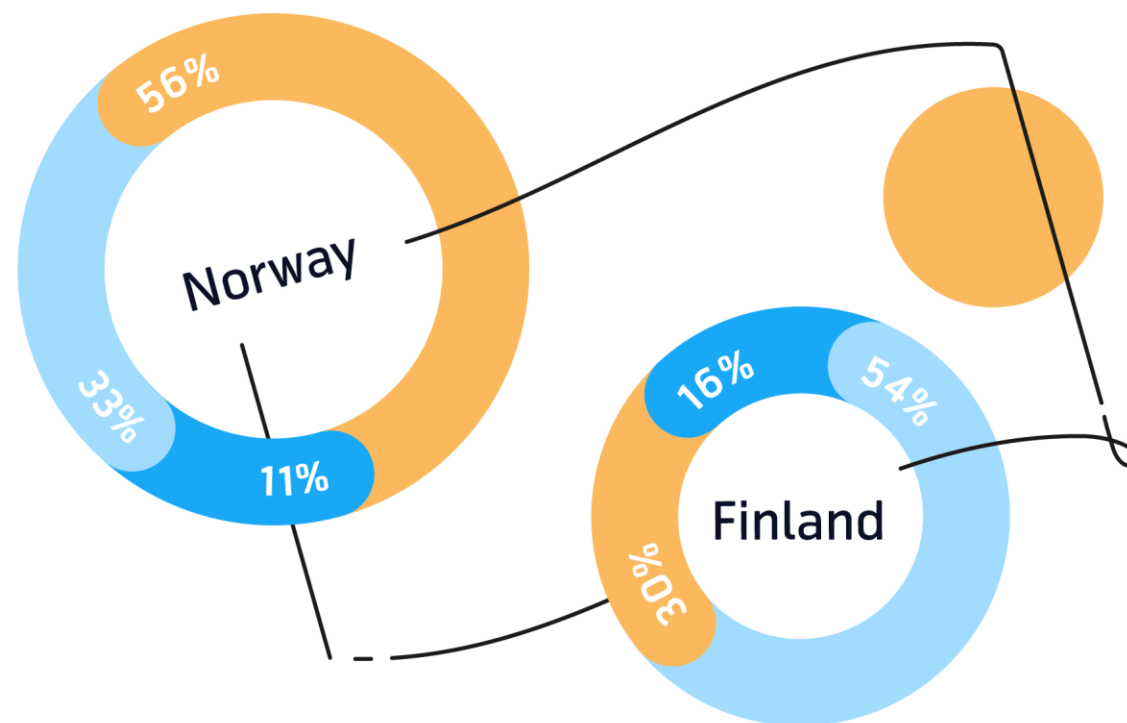
Source: Telenor Research, Smart Life Survey, 2019

Norway: N=1640, Sweden: N=1004, Denmark: N=1006, Finland: N=1005, Malaysia: N=1000, Pakistan: N=1000



Privacy knowledge

More than half of all Finns don't consider online services as Facebook truly free, while just a third of all Norwegians share the same opinion.



Yes No Don't know

Survey question: *do you consider online services, such as Facebook or Google, as truly free?*

Privacy actions

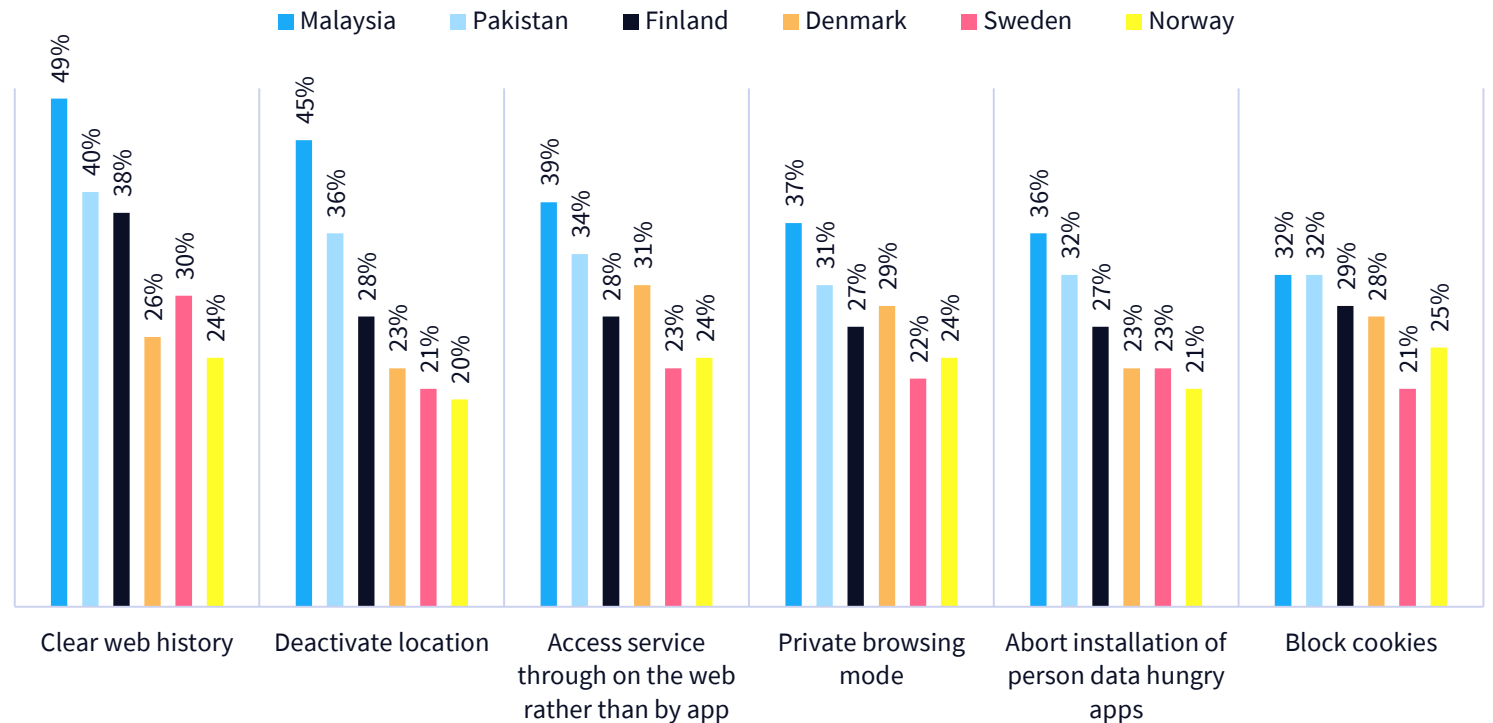
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Key take-aways

Mobile internet users in **Malaysia** and **Pakistan** have a stronger tendency than the rest to take actions on a monthly basis to protect their personal data online.

Moreover, the **Finns** are more inclined to take actions than their Nordic peers.

Share of respondents who take each stated action at least once a month to protect their personal data (%)



Source: Telenor Research, Smart Life Survey, 2019

Norway: N=1640, Sweden: N=1004, Denmark: N=1006, Finland: N=1005, Malaysia: N=1000, Pakistan: N=1000



Privacy actions

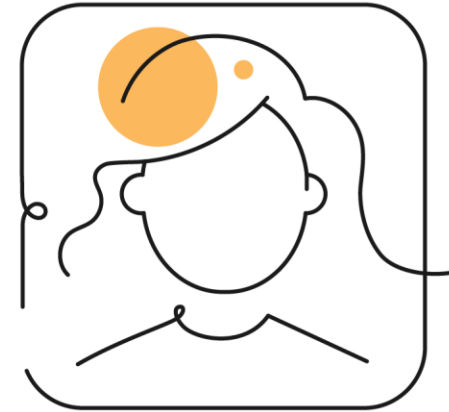
Malaysians are most active when it comes to taking action to protect their privacy online. Females in Norway and Sweden least active, and also considerably less active than their male counterparts.

Female users

Malaysia 80%

Sweden 57%

Norway 56%



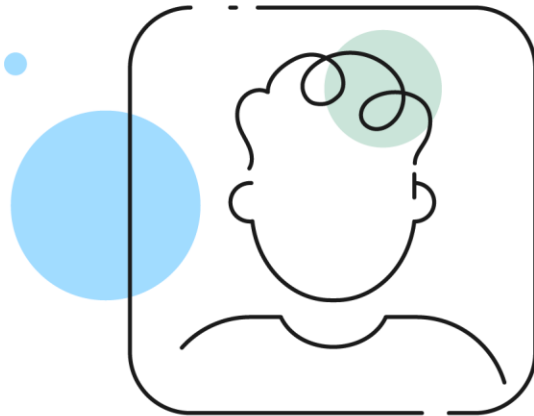
Taking active privacy action

Male users

80% Malaysia

75% Sweden

68% Norway



Privacy actions

(3/3)

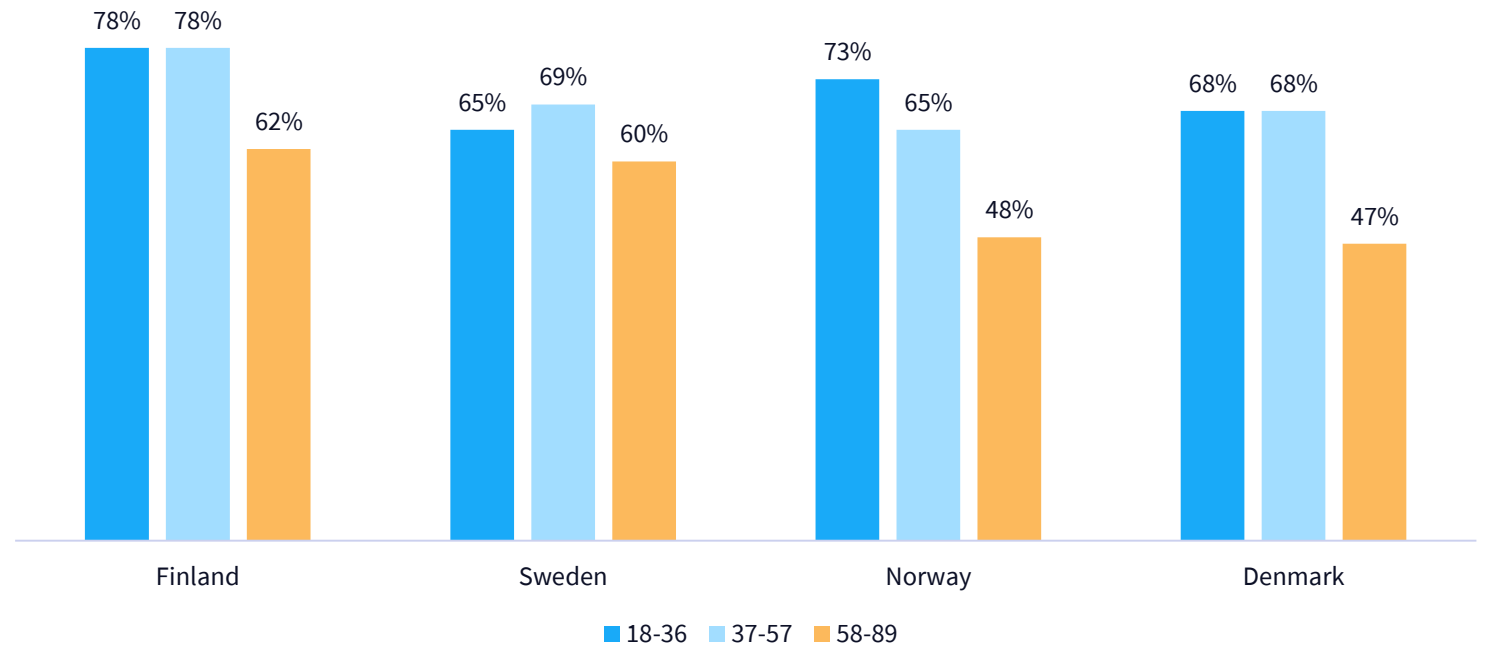
Key take-aways

The older mobile internet users in **Sweden** and **Finland** are more active in taking privacy protective actions than their peers in Denmark and Norway.

However, it is less common to take actions among the older users than those under 58 years of age.

Message to Group Comms: Please note that Pakistan and Malaysia are not included here as the number of respondents age 58+ is too low.

Percentage of respondents that actively take action to protect their privacy online. By age. (%)



Source: Telenor Research, Smart Life Survey, 2019

Norway: N=1640, Sweden: N=1004, Denmark: N=1006, Finland: N=1005, Malaysia: N=1000, Pakistan: N=1000



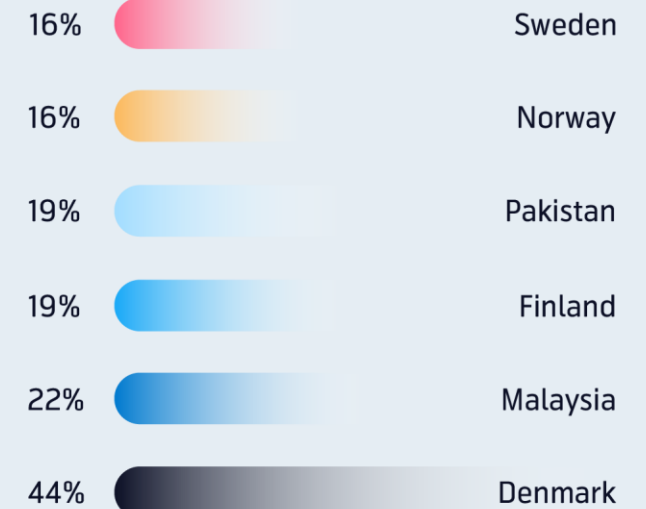
Sharing personal data

Young people are more willing to share credit card information despite no purpose given by the MNO. Especially young Danes.



Age: 18-36

Percentage of users agreeing to share credit card information



Telenor Research SmartLife Survey 2019

Sharing personal data

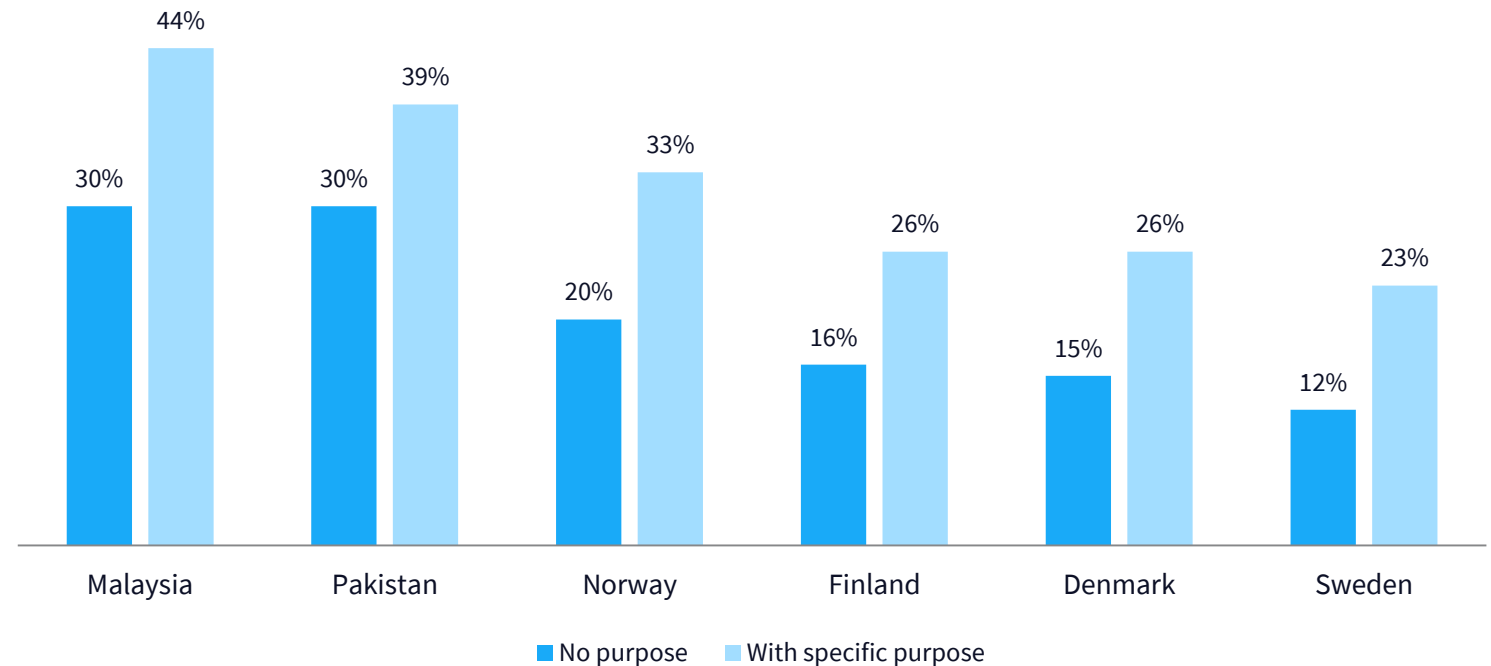
(2/3)

Key take-away

People are more willing to share information when a purpose regarding security is stated. The chart shows how this is reflected in the question about sharing of data for facial recognition.

The security purpose that was given in the survey question was: «...data that makes face recognition possible in order to make my data and accounts more secure».

Share of respondents willing to share data for FACIAL RECOGNITION with mobile operator without specified purpose versus with specified security purpose. (%)



Source: Telenor Research, Smart Life Survey, 2019

Norway: N=1640, Sweden: N=1004, Denmark: N=1006, Finland: N=1005, Malaysia: N=1000, Pakistan: N=1000



Sharing personal data

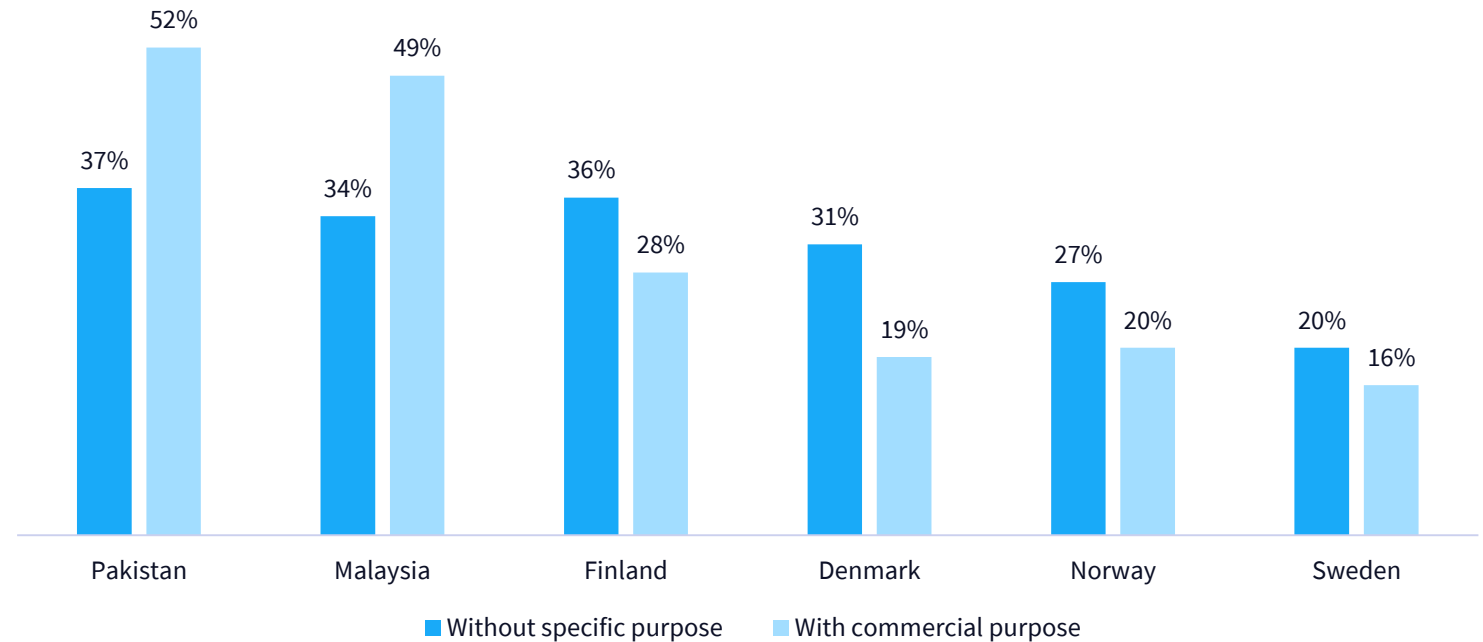
(3/3)

Key take-aways

If the purpose is commercial, the mobile internet users in Malaysia and Pakistan are more willing to share location information whereas users in the Nordic markets become less willing to share. The chart shows how this is reflected in the question about sharing of location data.

The commercial purpose in the survey question used for the chart was “..to get offers and discounts based on your location”.

Share of respondents willing to share data for LOCATION with mobile operator without specified purpose versus with specified commercial purpose. (%)



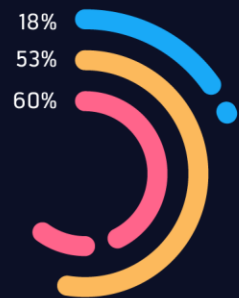
Source: Telenor Research, Smart Life Survey, 2019

Norway: N=1640, Sweden: N=1004, Denmark: N=1006, Finland: N=1005, Malaysia: N=1000, Pakistan: N=1000

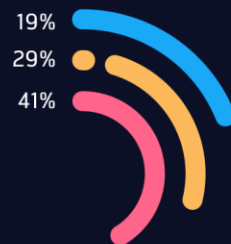


Security

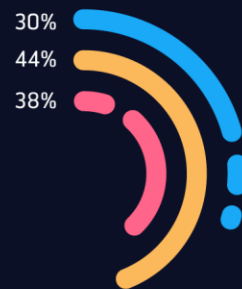
People worry more about their personal data being stolen from their MNO than about MNO potentially storing or using their data without consent, except for Pakistan where more people worry about data being stored than stolen.



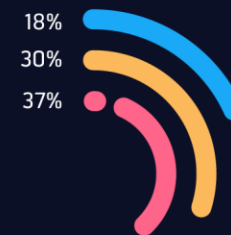
Malaysia



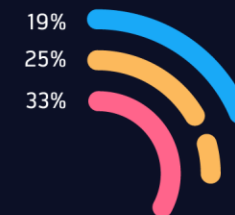
Denmark



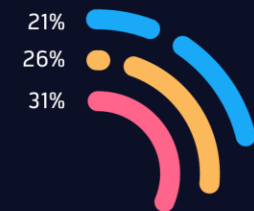
Pakistan



Finland



Norway



Sweden

Worry about misuse of data

Worry about MNO storing data

Worry about MNO stealing data

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2

MOBILE DATA USAGE



Mobile data usage and/or wifi

(1/1)

Key take-away

Norwegians are more prone to limit their data usage outside wifi zones than their peers in Sweden (Chart 1). Yet, like the Swedes, most of the Norwegians do not experience this as bothersome (Chart 2).

Chart 1. Survey question: *To what extent do you limit your data usage on mobile phone outside WiFi zones?* (% share of respondents)

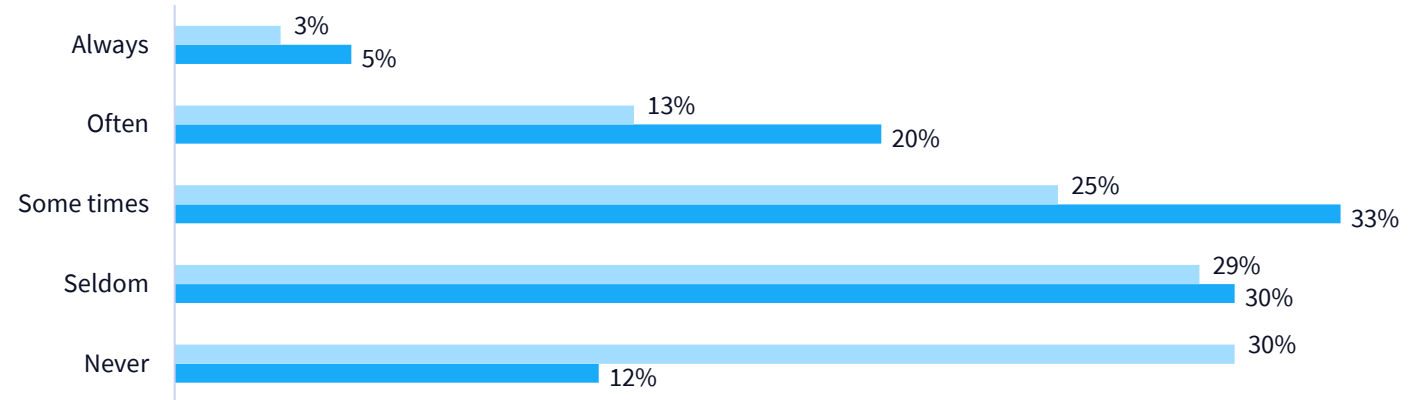
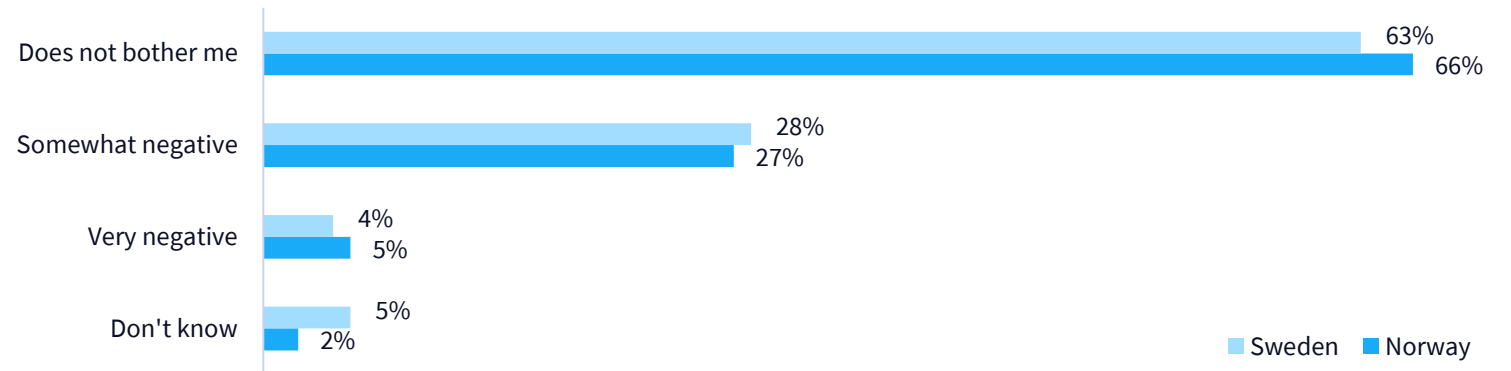


Chart 2. Survey question: *How do you experience that you need to limit data usage?* (% share of respondents)



Source: Telenor Research, Smart Life Survey, 2019
Norway: N=1640, Sweden: N=1004



What do they use the data for on their mobiles?

(1/1)

Message to Group Comms: This list provides some of the findings on what they use on their phones. We can dig deeper into some of these findings if you like.

Norway

91% of young people aged 18-29 check Snapchat on their mobile phone at least once a day compared to an average of 43% in the other markets, 51% in the other Nordic markets

Sweden

48% check Instagram on their phone every day compared to 33% in the other Nordic markets

Denmark

25% stream video on their phone at least once a day despite having subscriptions with very large data packages (compared to 36% daily video streamers in Norway and 28% in Sweden where the majority of mobile internet users have smaller data packages)

Finland

Only 23% stream video on their phone at least once a day despite having subscriptions with unlimited data (compared to 36% in Norway and 28% in Sweden where majority of mobile internet users have smaller data packages)

Malaysia

63% use the phone as hotspot at least once a month (compared to 24% in Nordics)

Pakistan

53% use the phone as hotspot at least once a month (compared to 24% in Nordics)

Source: Telenor Research, Smart Life Survey, 2019

Norway: N=1640, Sweden: N=1004, Denmark: N=1006, Finland: N=1005, Malaysia: N=1000, Pakistan: N=1000



Commuting

(1/1)

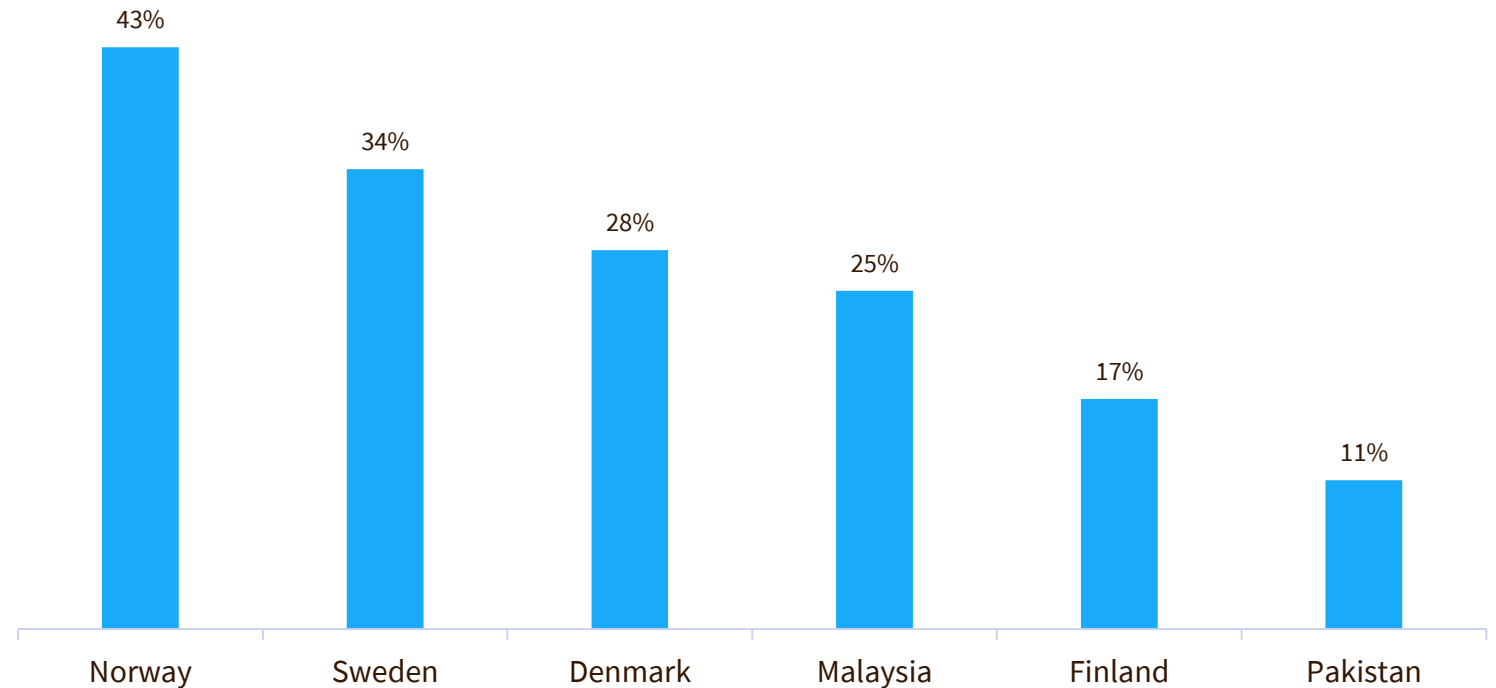
Key take-away

Smartphones are apparently a more common sight on buses, trains and ferries in **Norway** than in its neighbouring countries.

Message to Group Comms:

We think it might be better to compare the biggest city per market, but haven't had the time to do so. We'll be happy to check this if you like to have that info.

Share of respondents always using their phone while traveling with public transportation (%)



Source: Telenor Research, Smart Life Survey, 2019

Norway: N=1640, Sweden: N=1004, Denmark: N=1006, Finland: N=1005, Malaysia: N=1000, Pakistan: N=1000



3

Trust, satisfaction and loyalty

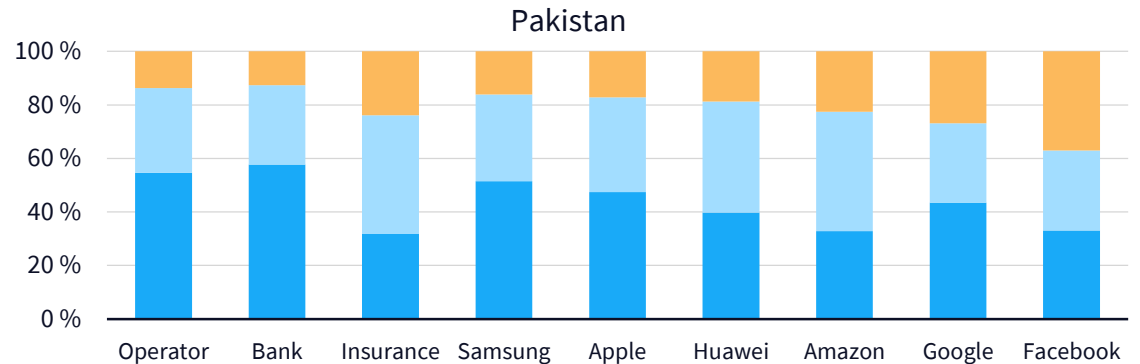
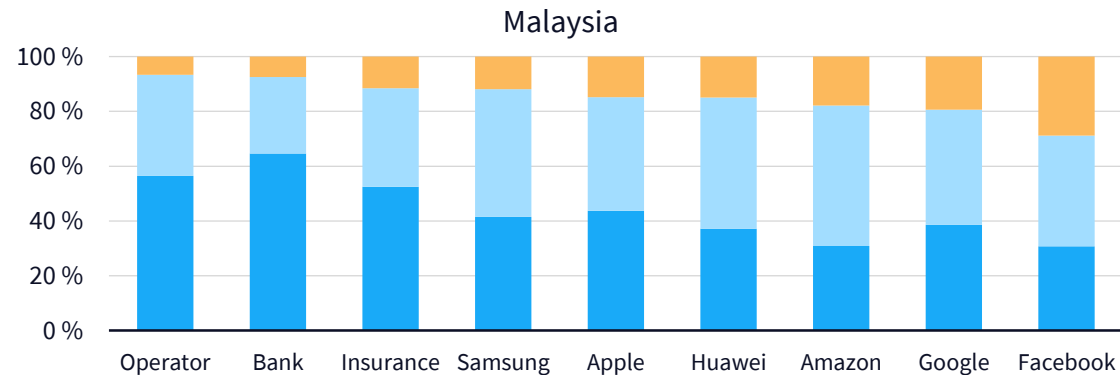
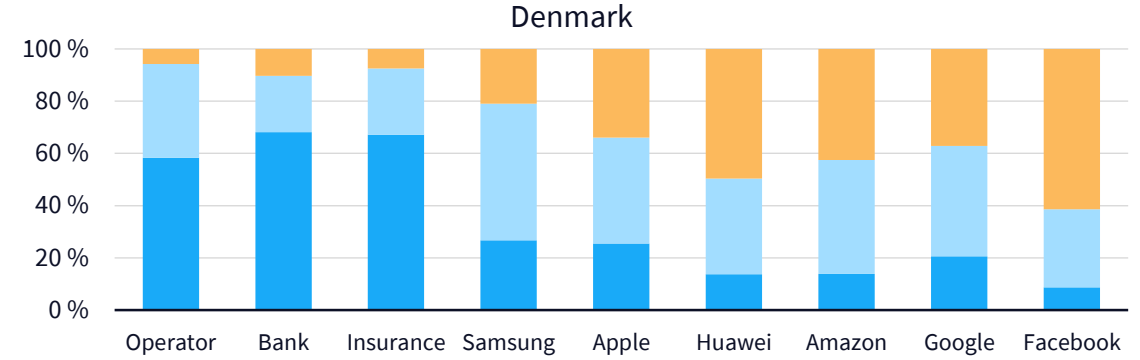
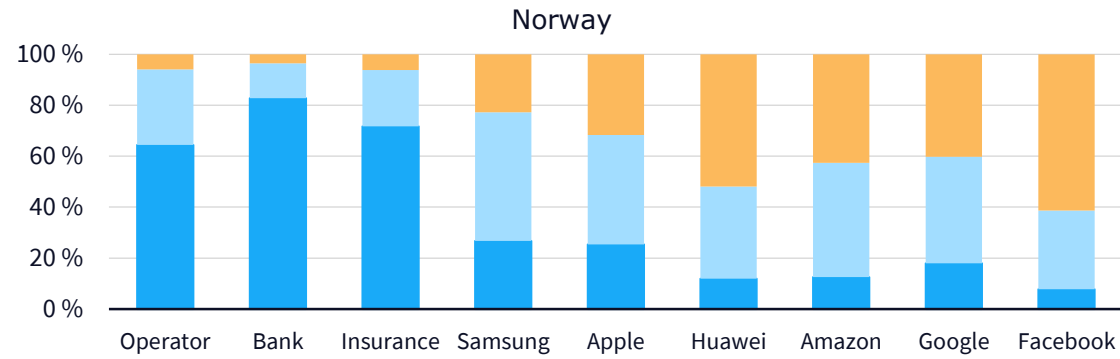
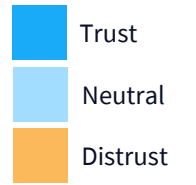


Trust towards different players (1/1)

Key take-away

The big internet players are less trusted in the Nordic than they are in Malaysia and Pakistan.

Share of respondents trusting the different players (%)



Source: Telenor Research, Smart Life Survey, 2019

Norway: N=1640, Sweden: N=1004, Denmark: N=1006, Finland: N=1005, Malaysia: N=1000, Pakistan: N=1000



Customer satisfaction and loyalty

(1/1)

Message to Group Comms:

There might be numbers here that can be interesting for an internal audience. Please note that survey was not limited to Telenor customers.

Norway	Sweden	Denmark	Finland	Malaysia	Pakistan
<ul style="list-style-type: none"> 83% are satisfied with their mobile operator 27% have been customer with their MNO for more than 10 years 27% think it is important to be a customer with their current MNO 68% report that in the future they will use their current MNO 45% will recommend others to be customers of their MNO 35% report that they are loyal to their current MNO 	<ul style="list-style-type: none"> 81% are satisfied with their mobile operator 39% have been customer with their MNO for more than 10 years 28% think it is important to be a customer with their current MNO 47% report that in the future they will use their current MNO 41% will recommend others to be customers of their MNO 31% report that they are loyal to their current MNO 	<ul style="list-style-type: none"> 79% are satisfied with their mobile operator 24% have been customer with their MNO for more than 10 years 30% think it is important to be a customer with their current MNO 54% report that in the future they will use their current MNO 50% will recommend others to be customers of their MNO 38% report that they are loyal to their current MNO 	<ul style="list-style-type: none"> 77% are satisfied with their mobile operator 33% have been customer with their MNO for more than 10 years 27% think it is important to be a customer with their current MNO 46% report that in the future they will use their current MNO 35% will recommend others to be customers of their MNO 31% report that they are loyal to their current MNO 	<ul style="list-style-type: none"> 77% are satisfied with their mobile operator 24% have been customer with their MNO for more than 10 years 55% think it is important to be a customer with their current MNO 64% report that in the future they will use their current MNO 64% will recommend others to be customers of their MNO 55% report that they are loyal to their current MNO 	<ul style="list-style-type: none"> 75% are satisfied with their mobile operator 26% have been customer with their MNO for more than 10 years 49% think it is important to be a customer with their current MNO 67% report that in the future they will use their current MNO 60% will recommend others to be customers of their MNO 57% report that they are loyal to their current MNO

Source: Telenor Research, Smart Life Survey, 2019

Norway: N=1640, Sweden: N=1004, Denmark: N=1006, Finland: N=1005, Malaysia: N=1000, Pakistan: N=1000





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