

Views from Around the Globe

2nd Annual Poll on How Personal Technology is Changing Our Lives

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Davos, Switzerland
January 2015



Snapshot

- Microsoft's second annual survey of Internet users around the world shows that fifteen years into the 21st century, Internet users still think overwhelmingly that personal technology is making the world better and more vital.
- While there is widespread agreement about the positive impacts of technology overall, there is also an emerging schism in the attitudes between developing and developed countries regarding how technology will affect people going forward.
- If there is one persistent concern about personal technology that nearly everybody expresses, it is privacy.

Microsoft's second annual survey of Internet users around the world shows that fifteen years into the 21st century, Internet users still think overwhelmingly that personal technology is making the world better and more vital.

Large majorities of the online populations in all five developed countries we surveyed (France, Germany, Japan, South Korea, and the United States) and all seven developing countries we surveyed (Brazil, China, India, Indonesia, Russia, South Africa and Turkey) say that technology has vastly improved how they shop, work, learn, and generally get stuff done.

Compared to 2014, respondents continue to be most enthusiastic about technology's effects on the economy and most concerned about privacy. The role of technology in transportation and literacy moved up, while technology's ability to improve social bonds and enhance personal freedom and expression moved down. Concern about privacy jumped five points.



Overall, Internet users are experiencing:

Accelerated Social Activism. Respondents in all the countries agree that social media has had a positive impact on social activism, with some concerns emerging especially in developed countries like France, the U.S. and Germany. Developing countries remain enthusiastic about technology opening up political expression, but their enthusiasm was more tempered this year (down 6 points).



Better Bargains. In every one of the twelve countries, respondents say personal technology has had a positive impact on their ability to find more affordable products, including 77 percent in developed countries and 72 percent in developing countries. Even the least enthusiastic country, China, believes this at a rate of 65 percent.



Innovation Explosion. In each of the twelve countries, respondents think personal technology has improved innovation in business, including more than three-quarters of respondents in developing countries. In Indonesia, Brazil, and India, more than 80 percent of respondents think this.



Entrepreneurial Engine. In all twelve countries, respondents think personal technology has had a positive impact on the ability to start new businesses, with Indonesia and Brazil again leading the way.



A Burst of Getting Stuff Done. A majority of respondents in nearly every country think technology has improved productivity, with on average more than seven in ten saying so in developing countries.

While there is widespread agreement about the positive impacts of technology overall, there is also an emerging schism in the attitudes between developing and developed countries regarding how technology will affect people going forward. Developing countries express deep and genuine enthusiasm about the benefits of technology, whereas developed countries – where technology is more ubiquitous – express greater concerns about emerging issues.

For example:



Impact on Social Bonds. Fully 60 percent of respondents in developing countries think personal tech has had a positive impact on social bonds, compared to just 36 percent of respondents in developed countries.



Sharing Economy Split. Fifty-nine percent of respondents in developing countries think technology-enabled, sharing-economy services – like Uber and Airbnb – are better for consumers than traditional services like taxis and hotels. But 67 percent of respondents in developed countries think the traditional services are better for consumers.



In the Media We (Don't) Trust. By a 2:1 margin, respondents in developing countries think personal technology has had a mostly positive effect on trust in the media. But in developed countries, the impression is the opposite: respondents believe by a 2:1 margin that the effect on trust in the media has been mostly negative. These opposing views are born out in the two kinds of countries' media habits: in developing countries, 70 percent of respondents get most of their news from social media, compared to only 31 percent in developed countries.



Getting Fit. The difference in opinion about tech's effect on fitness is striking: 57 percent of respondents in developing economies think personal technology has made people in their country more fit, thanks to apps for diet management, calorie counting, and exercise incentives – but 62 percent of respondents in developed economies think personal technology has made people in their country less fit, because of the amount of time people waste in front of their PCs, tablets, game consoles, etc.



The Tug on Children. In developing countries, the majority of online parents (77 percent) want their children to have more access to technology, but in developed countries, the majority of online parents (56 percent) want their children to have less access.



STEM and Gender. Finally, there is a real split in engagement regarding the very topic of this survey: science and technology. Although large pluralities of respondents in all twelve countries believe the best jobs in the future will be in STEM, fewer than six in ten respondents in developed countries say they are interested in working in STEM, compared to 85 percent in developing countries. And while 77 percent of women respondents in developing countries feel encouraged to work in STEM fields, only a minority – 46 percent – of women respondents in developed countries do.

The Privacy Challenge.

If there is one persistent concern about personal technology that nearly everybody expresses, it is privacy. In eleven of the twelve countries surveyed, with India the only exception, respondents say that technology's effect on privacy was mostly negative. Majorities of respondents in every country but India and Indonesia say current legal protections for users of personal technology are insufficient, and only in those two countries do most respondents feel fully aware of the types of personal information collected about them. Majorities of respondents in both developed and developing countries think that the legal rights of Internet users should be governed by the local laws of the country where the users live; that if a foreign government wants information about a person stored in a datacenter in that person's country, they should have to seek permission from the person, not just the government; that police officers should have to get a search warrant to search for personal information on PCs; and that personal information stored in the cloud should be subject to at least the same privacy protections as personal information stored on paper.

About the survey

- This personal technology survey was conducted online between December 17, 2014 and January 1, 2015 by the global research-based consultancy Penn Schoen Berland
- For the purposes of this research, “developed countries” are defined as: USA, France, Germany, Japan and South Korea; “developing countries” are defined as: Brazil, India, Russia, China, Turkey, South Africa and Indonesia (as defined by the IMF)
- In order to accurately represent the relative size of each country’s population of Internet users, data from countries with larger populations of Internet users is weighted more strongly relative to countries with smaller populations of Internet users



12 Countries

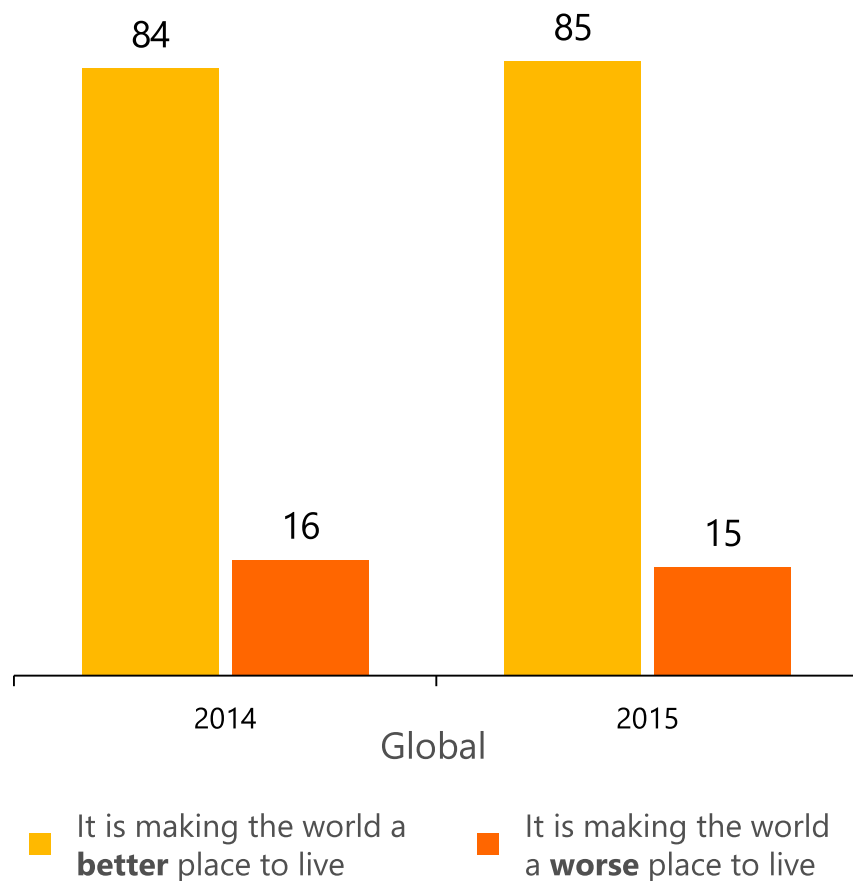
12,002 Online Interviews

	Global	Brazil	China	France	Germany	India	Indonesia*	Japan	Russia	South Africa*	South Korea*	Turkey	United States
n-size	12002	1000	1000	1001	1000	1000	1000	1000	1001	1000	1000	1000	1001
MoE	±0.89%	±3.10%	±3.10%	±3.10%	±3.10%	±3.10%	±3.10%	±3.10%	±3.10%	±3.10%	±3.10%	±3.10%	±3.10%
	Developed	Developing	Parents	Non-Parents	Developed Parents	Developing Parents	Developed Non-Parents	Developing Non-Parents	Developed Country – Male	Developed Country – Female	Developing Country – Male	Developing Country – Female	
n-size	5001	7001	5659	6343	1556	4103	3445	2898	2411	2590	3808	3193	
MoE	±1.39%	±1.17%	±1.30%	±1.23%	±2.48%	±1.53%	±1.67%	±1.82%	±1.99%	±1.92%	±1.59%	±1.73%	

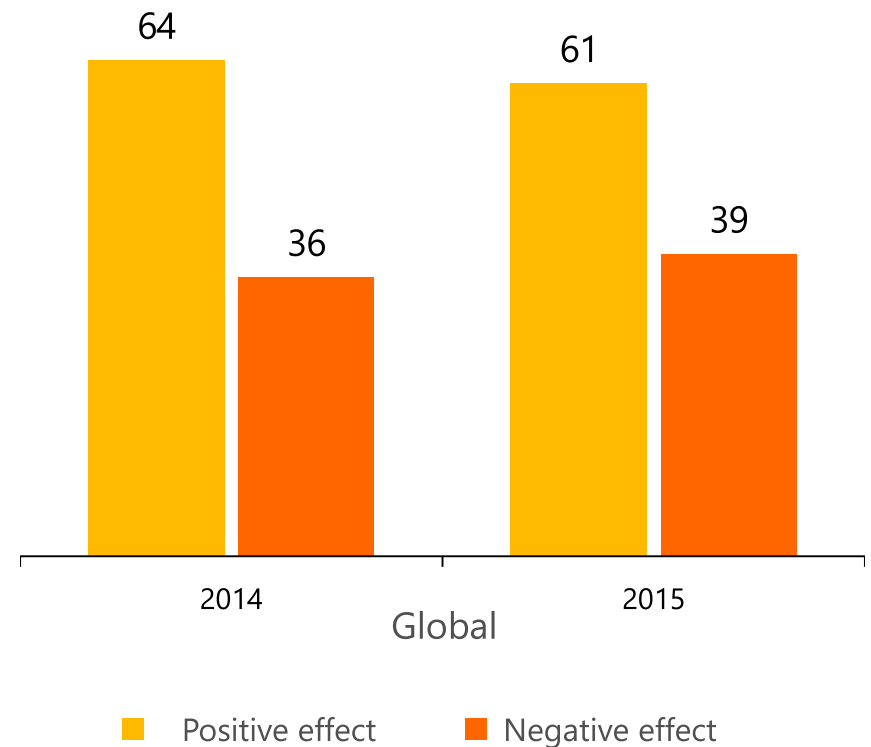
*Mexico removed for 2015 and replaced with Indonesia, South Africa and South Korea

Internet users continue to agree that personal technology is making the world a better place

Personal technology's impact on the world

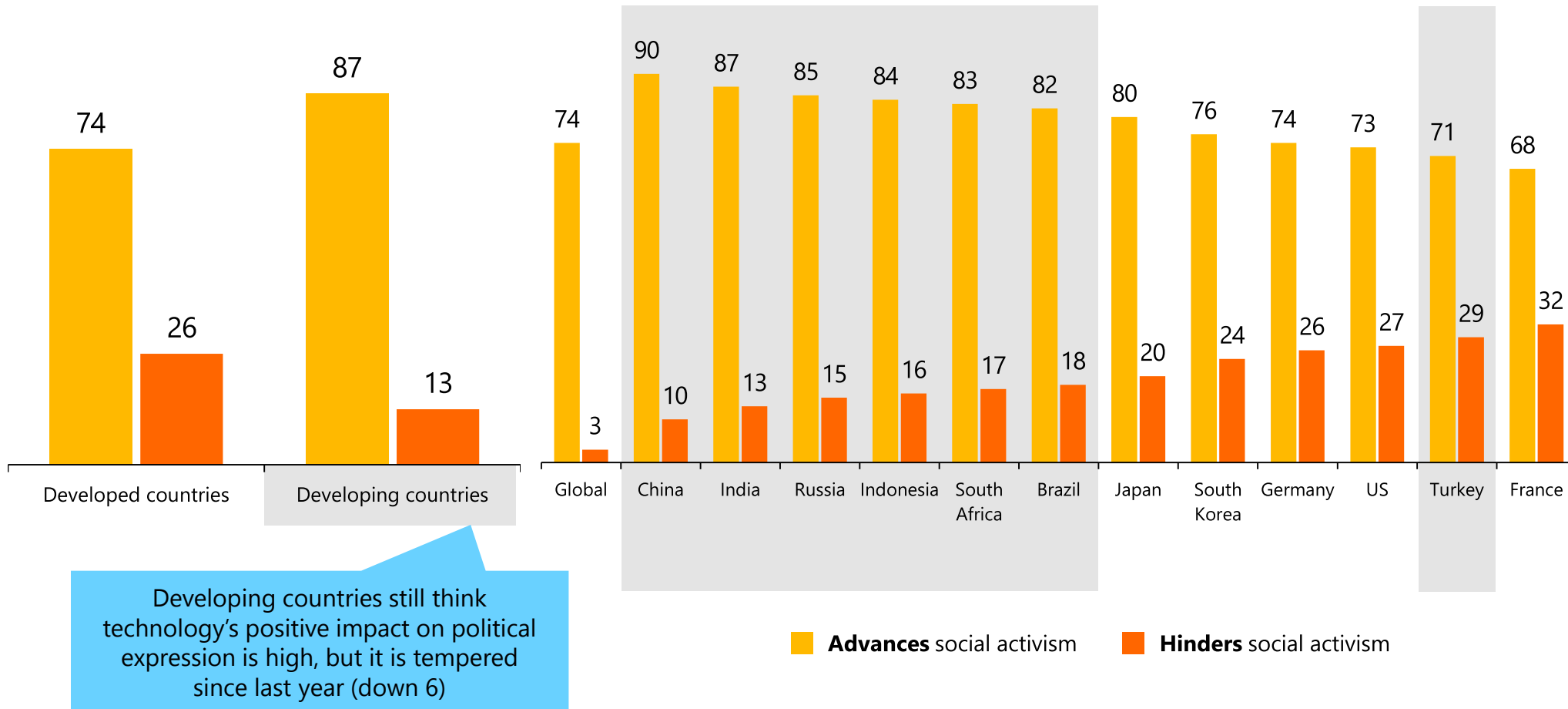


Personal technology's impact on social values



Internet users in all countries agree that social media has had a positive impact on social activism, though some concerns are emerging

Impact of social media on social activism

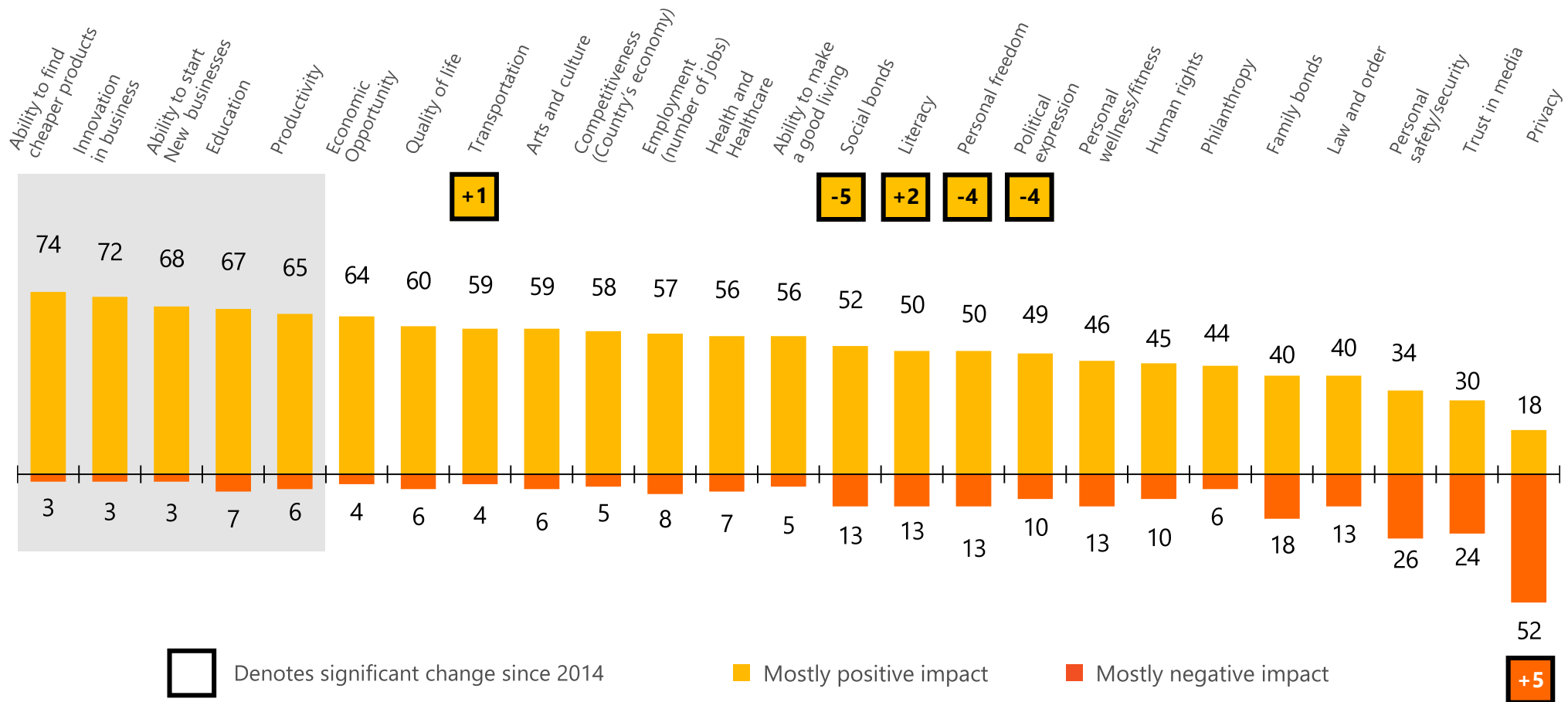


2014 vs 2015

- 1 Internet users continue to be most enthusiastic about technology's effects on the economy and most concerned about privacy.
- 2 The role of technology in transportation and literacy moved up, while technology's ability to improve social bonds, personal freedom, and political expression moved down.
- 3 Concern about privacy jumped 5 points.

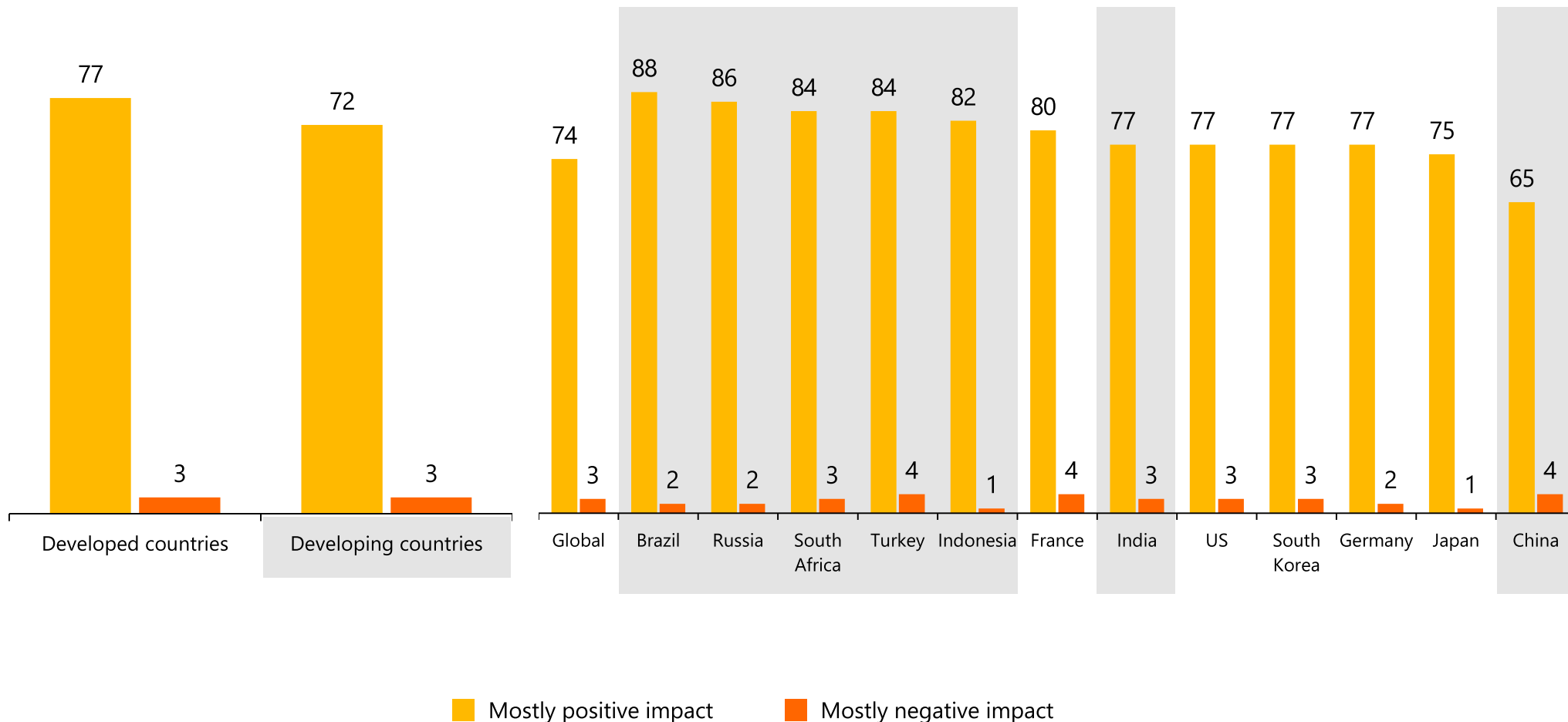
Large majorities believe that personal technology has led to finding lower-priced goods, more innovation in business, better education, and increased productivity

Positive and negative impacts of personal technology



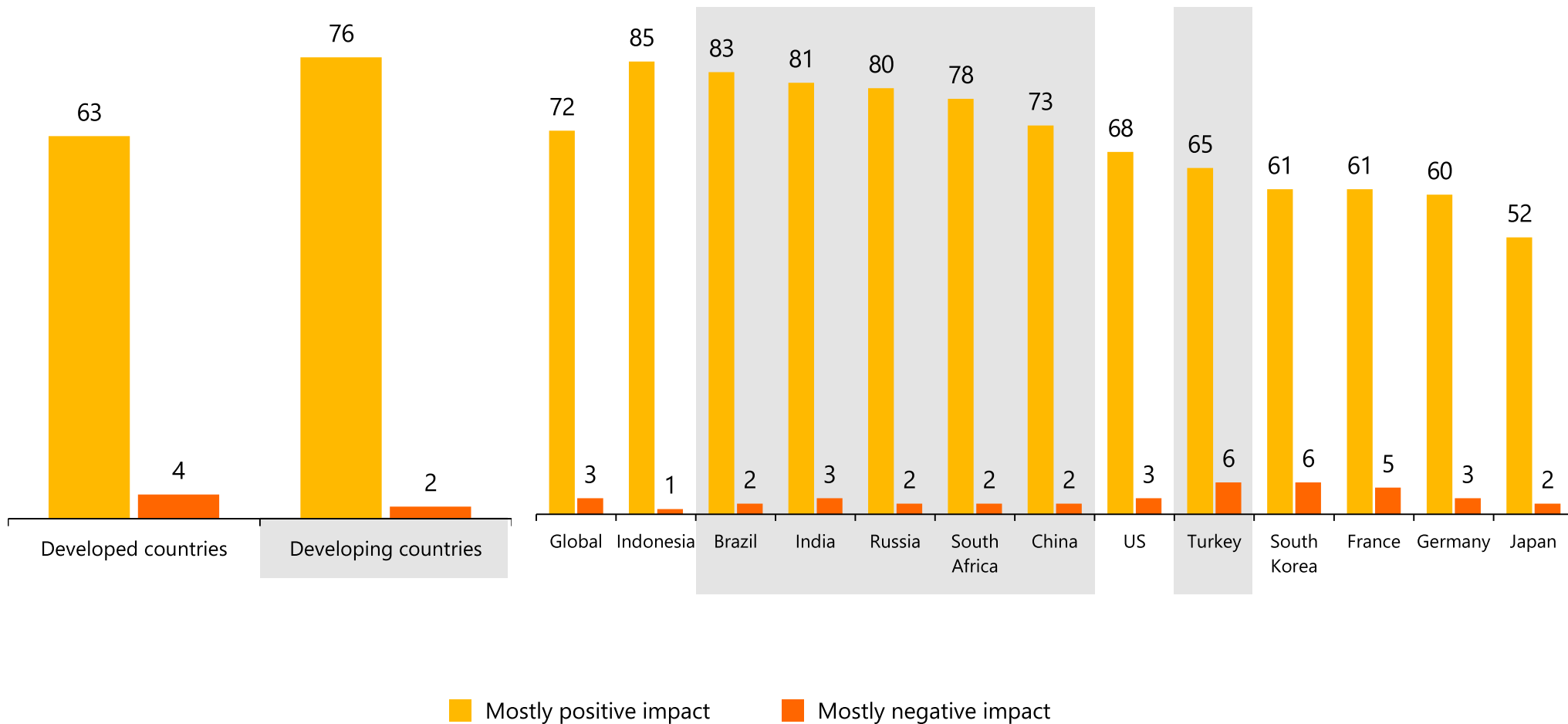
Internet users in every country think personal technology has improved the ability to find more affordable products

Impact of personal technology on ability to find cheaper products



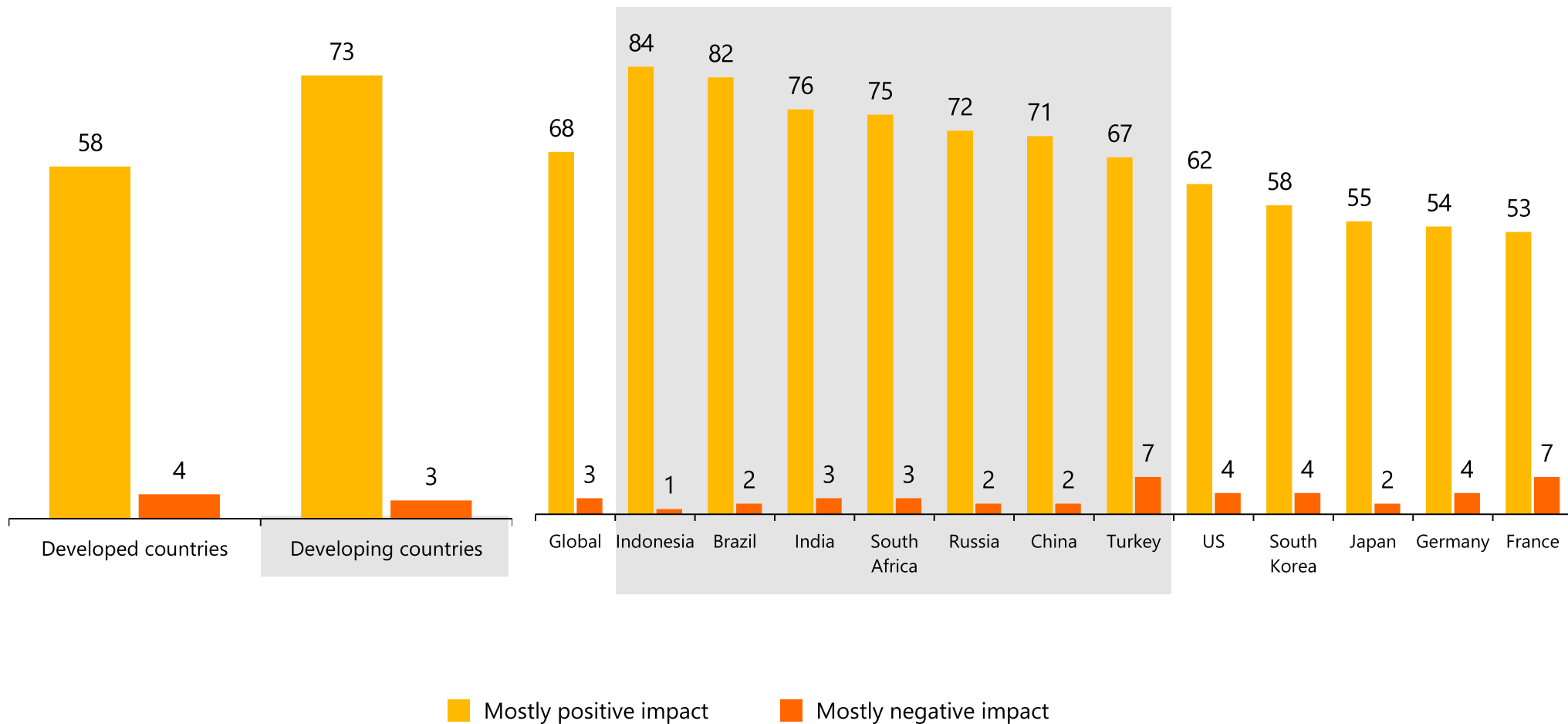
Internet users in every country think personal technology has improved innovation in business

Impact of personal technology on innovation in business



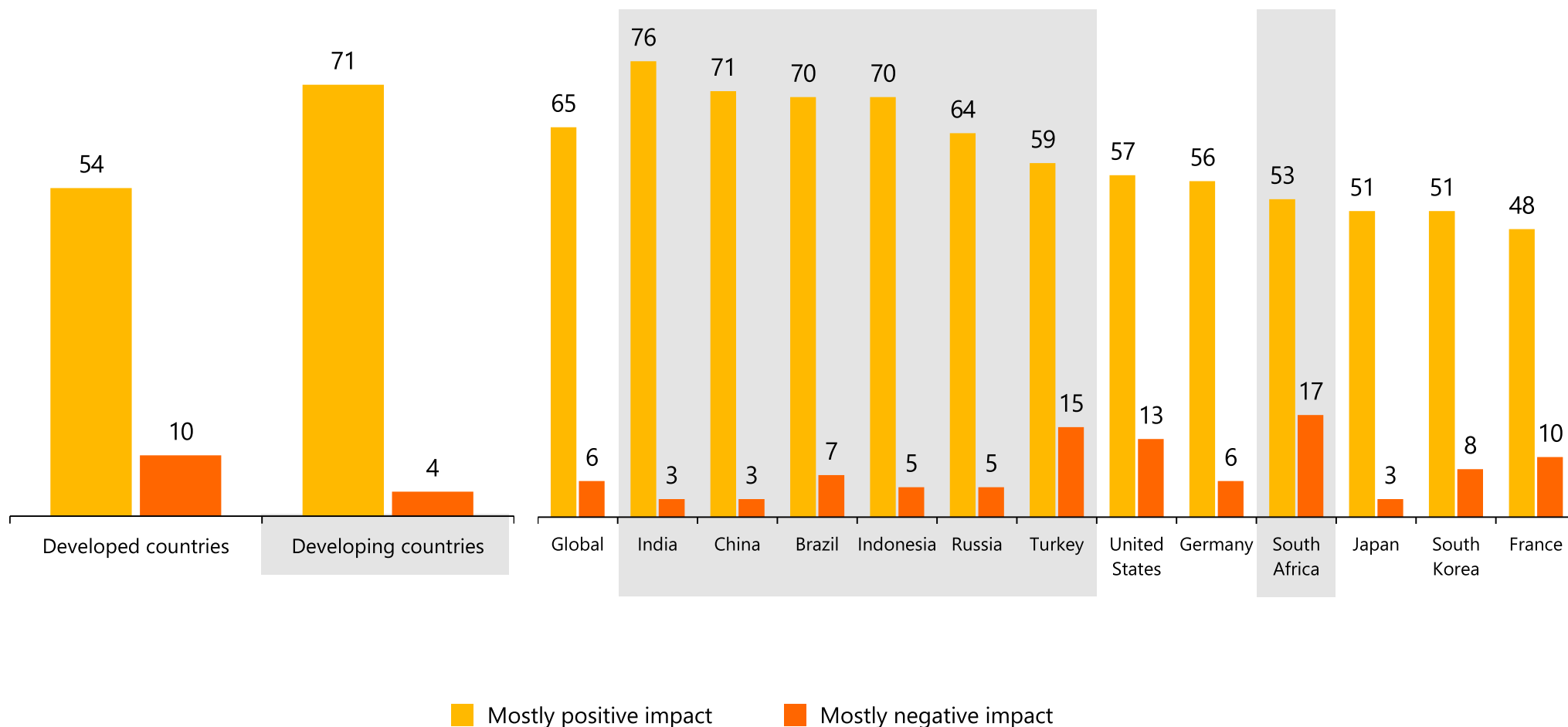
Internet users in every country think personal technology has improved the ability to start new businesses

Impact of personal technology on ability to start new businesses



A majority of Internet users in nearly all countries feel that personal technology has improved productivity

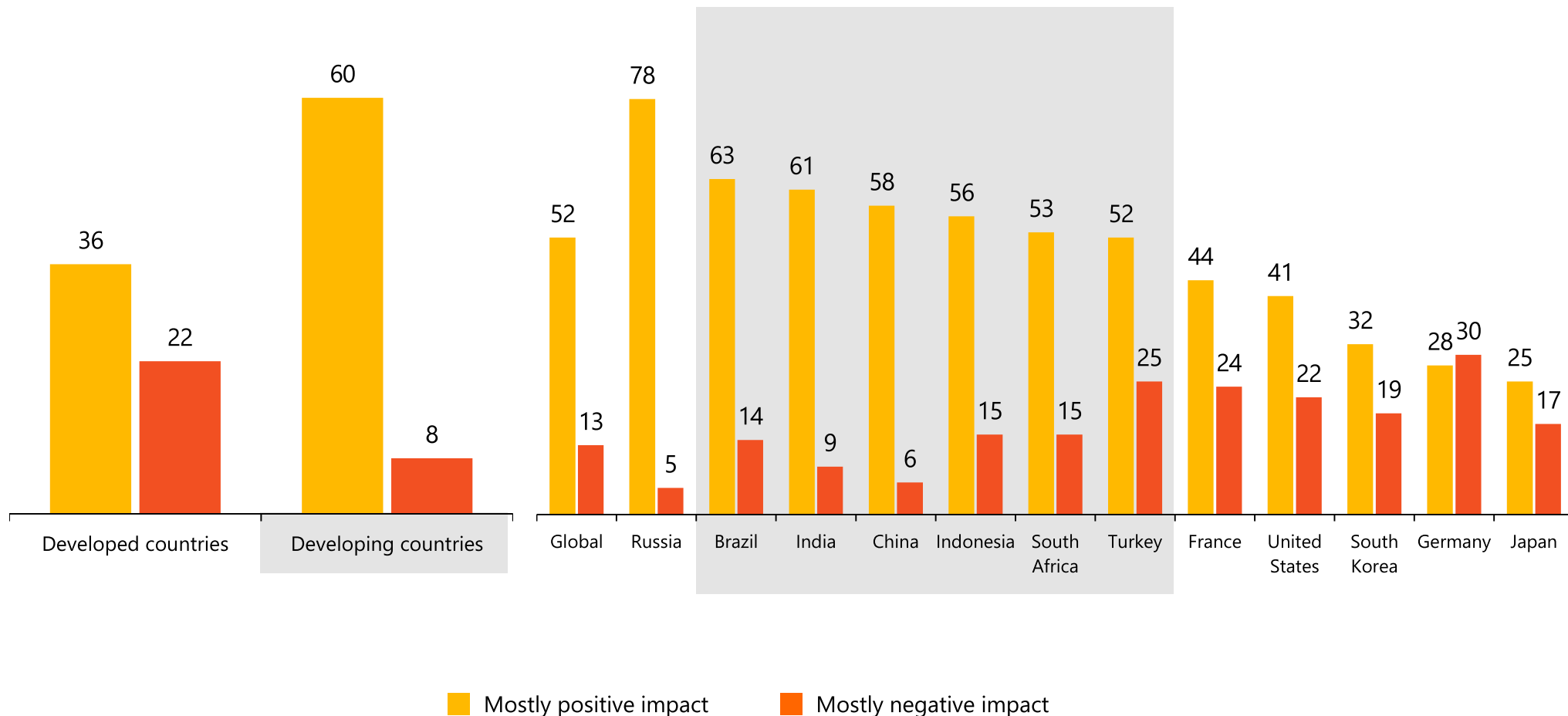
Impact of personal technology on productivity



But there is a schism in attitudes between Internet users in developing and developed countries regarding how personal technology will affect people moving forward

A large majority of Internet users in developing countries think personal technology has had a positive impact on social bonds, but barely a third do in developed countries

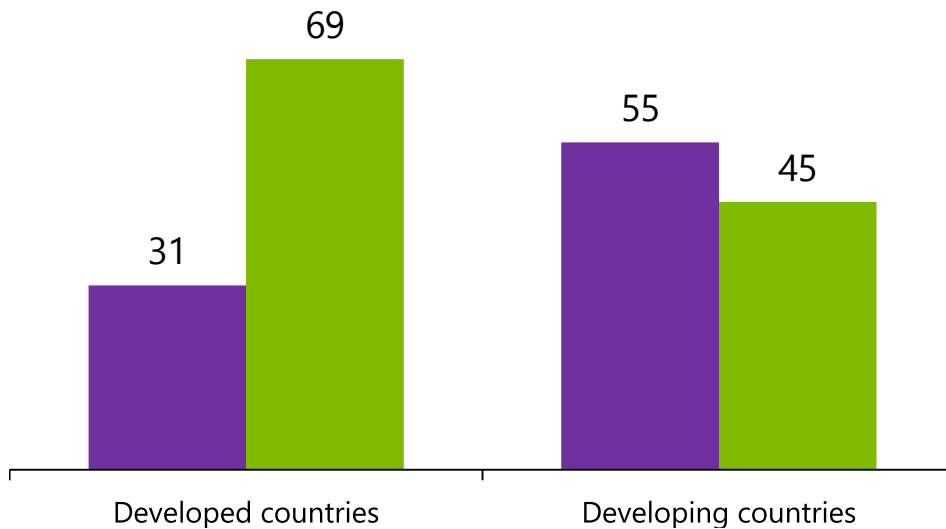
Impact of personal technology on social bonds



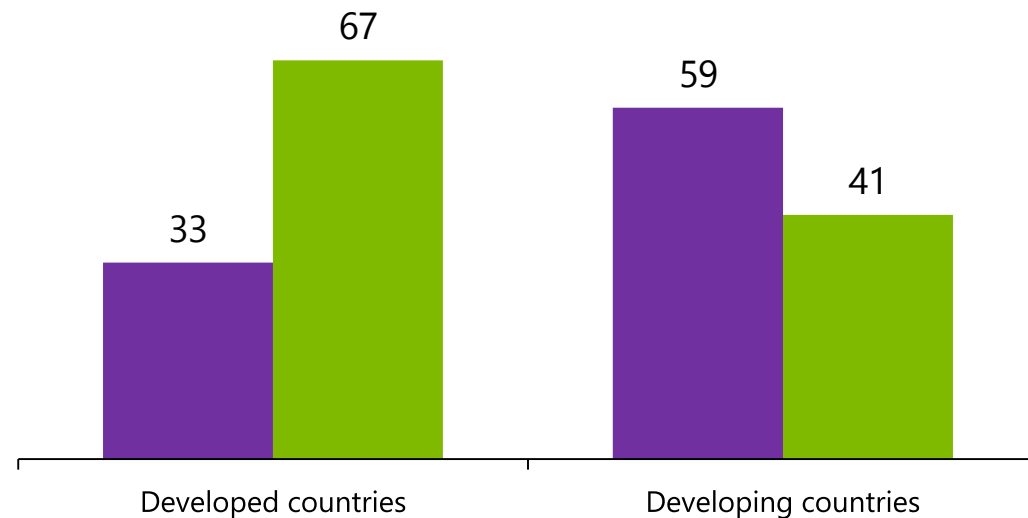
Developing countries think tech-enabled services like Uber and Airbnb are better for workers and consumers; developed countries think traditional services are better

Technology-enabled services vs. Traditional services

Better for the workers in the industry



Better for consumers

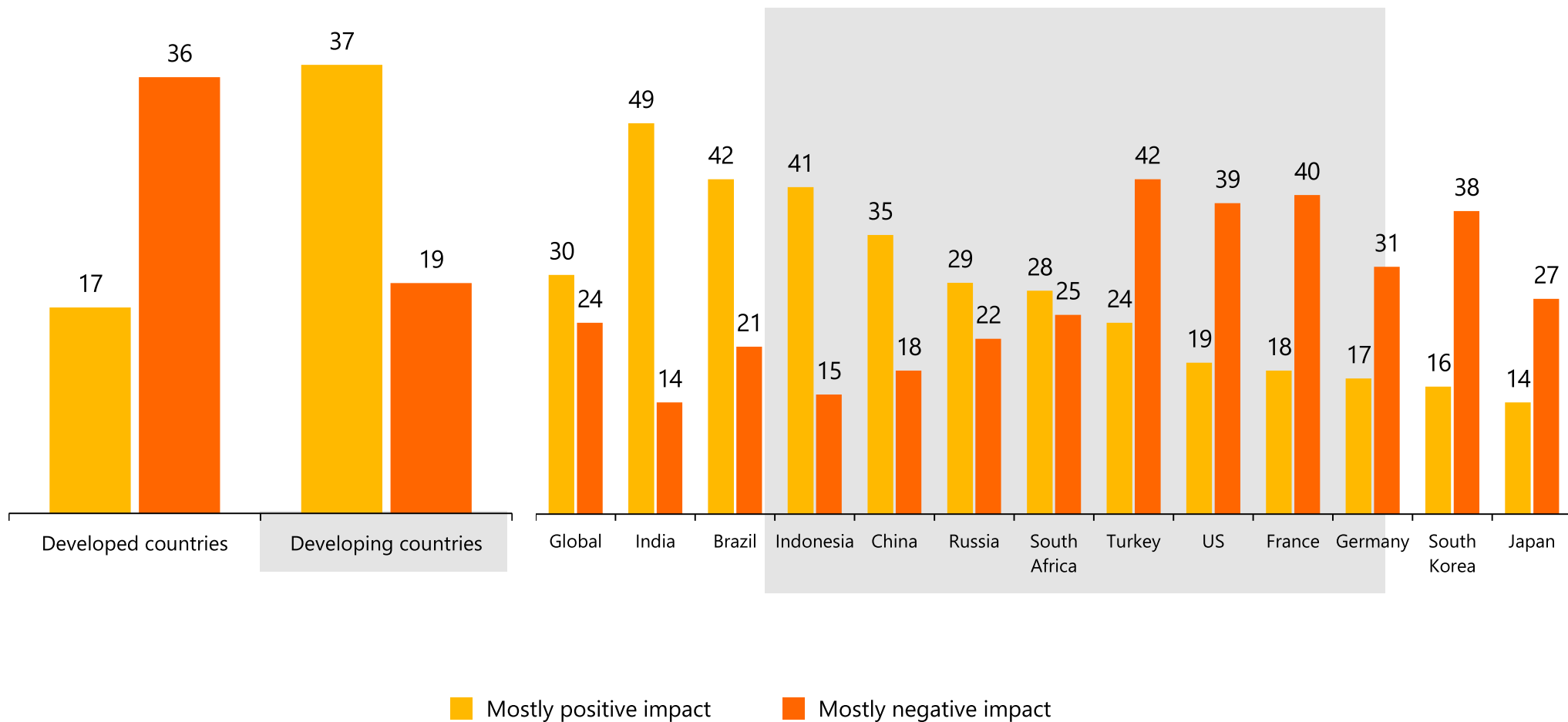


■ **Technology-enabled services** like Uber, Airbnb, ODesk, etc

■ **Traditional services** like taxis, hotels, employment agencies

Most developing countries think personal technology has had a mostly positive impact on trust in the media; developed countries think it's been mostly negative

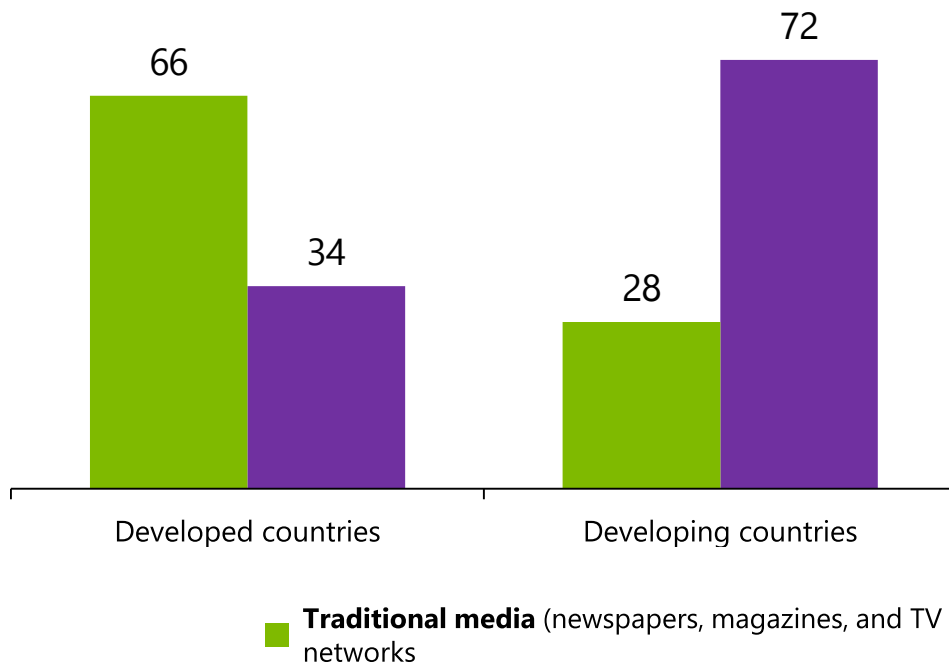
Impact of personal technology on trust in media



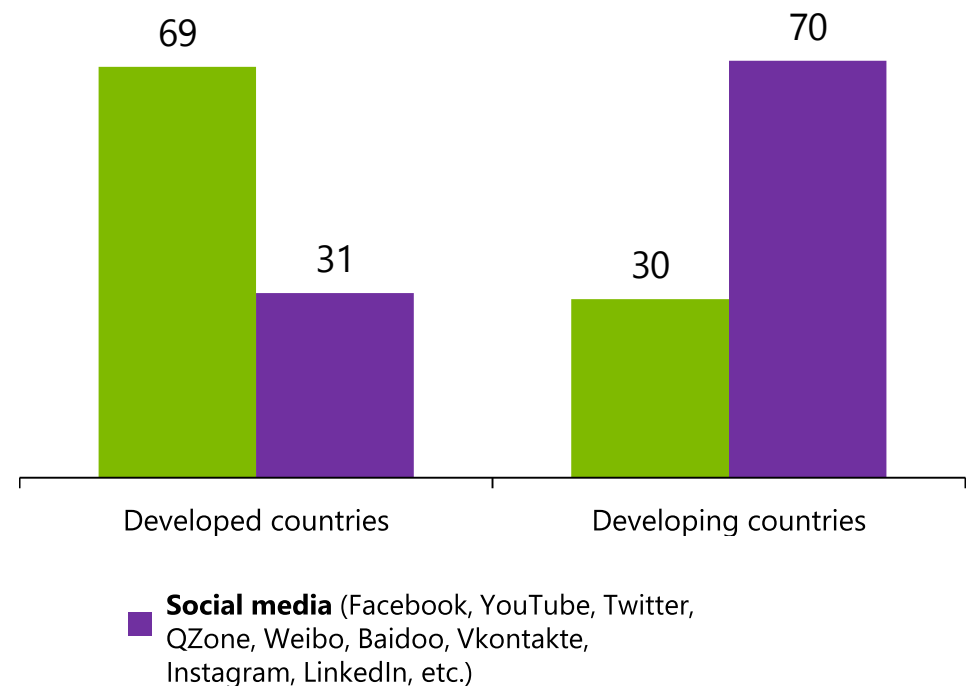
Indeed, unlike developed countries, Internet users in developing countries turn first and most to social media for news and information

In regard to news and information, I would say I generally...

Go **FIRST** to find out the latest news and information



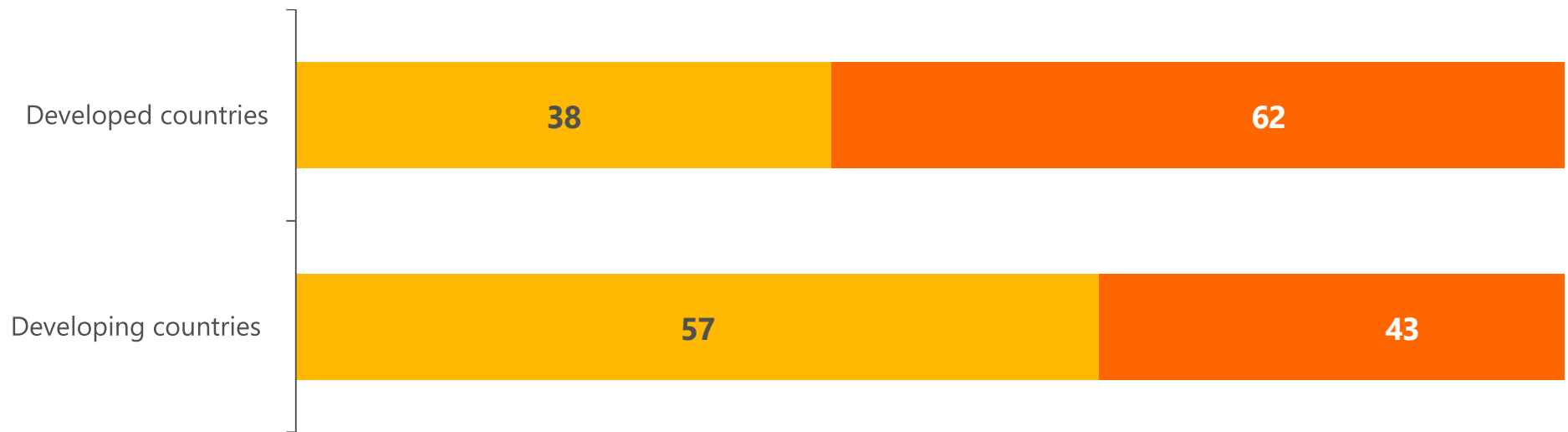
Get **MOST** of my news and information



Developing countries think personal technology has made them more fit, but developed countries think personal technology has made them less fit

Thinking about your country, how has personal technology impacted fitness?

Personal technology has made people in my country...

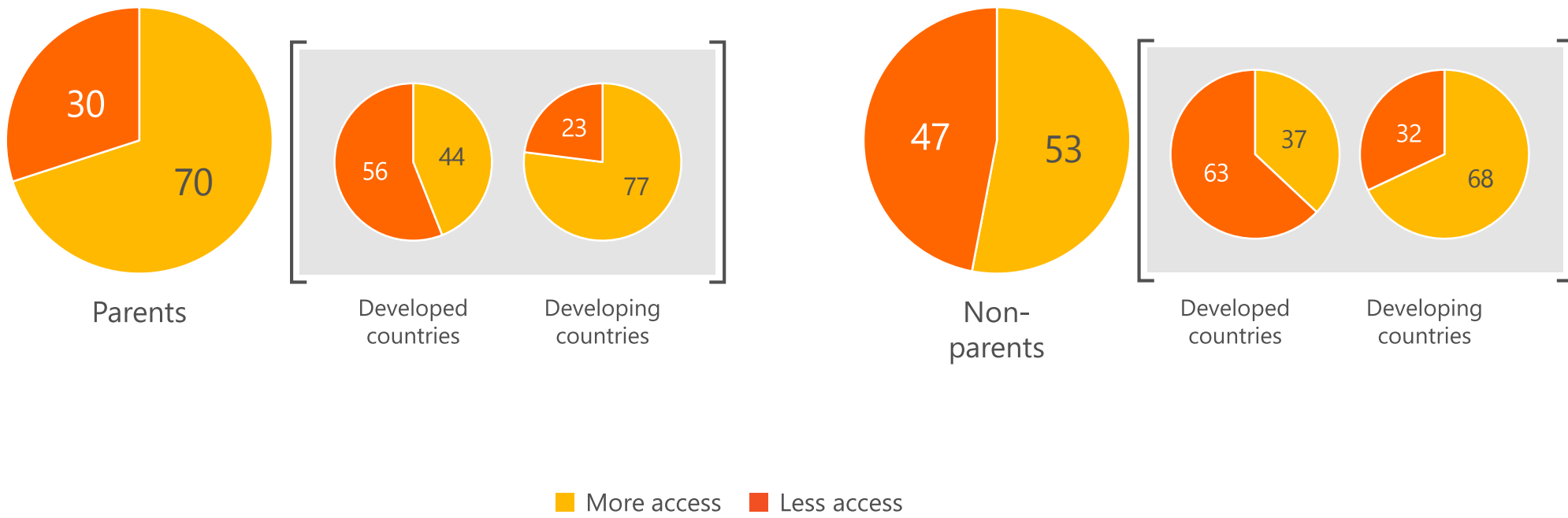


■ ... **more fit** through applications for diet management, calorie counting and exercise routines

■ ... **less fit** due to the amount of time people waste in front of their PCs, laptops, tablets, smartphones, game consoles, etc.

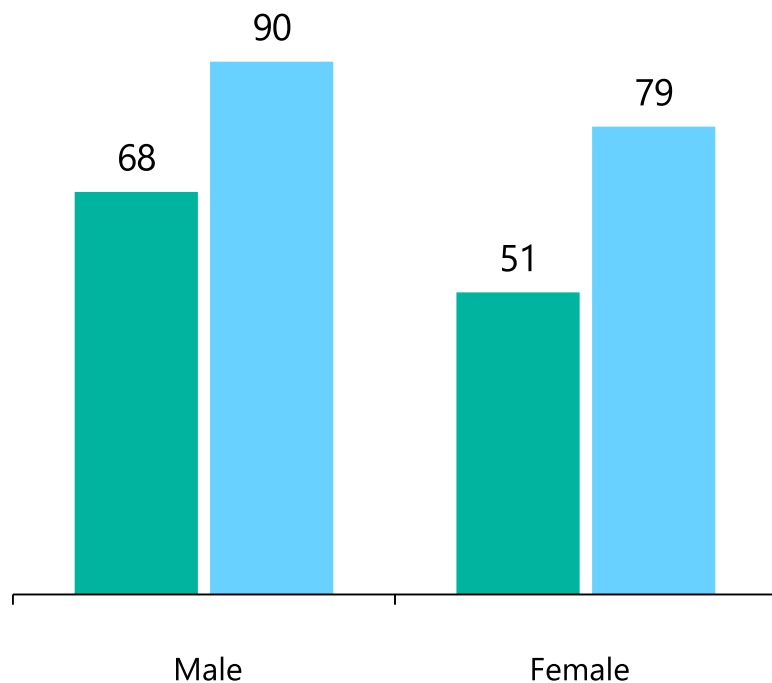
Developing countries want children to have greater access to personal technology, but developed countries think children should scale back

Should children have more or less access to personal technology?

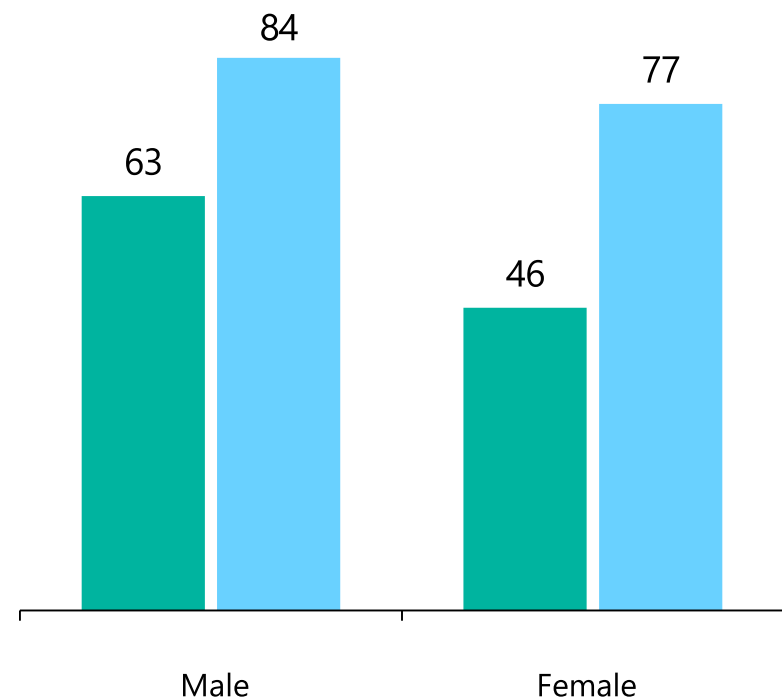


Internet users in developing countries feel more interest and encouragement to go into STEM fields, especially women

People like me are interested in working in STEM (science, technology, engineering, and math) fields



People like me are encouraged to work in STEM (science, technology, engineering, and math) fields

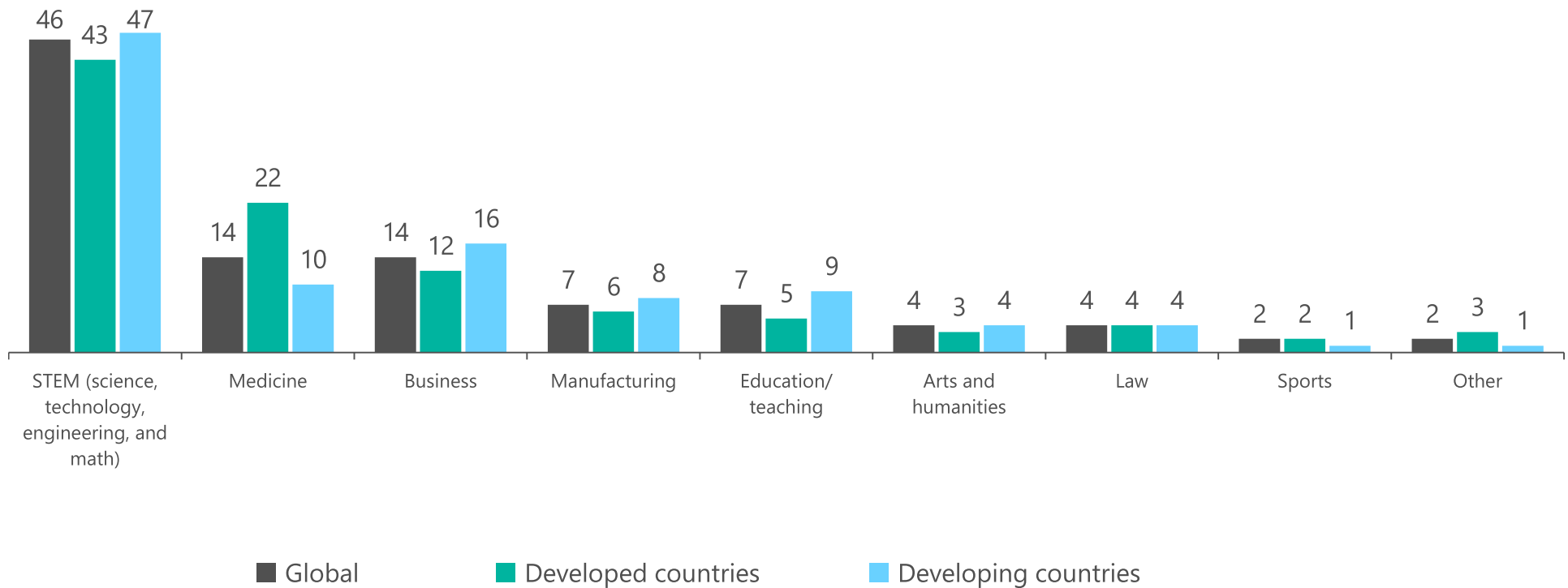


■ Developed countries

■ Developing countries

... which is where all Internet users think the best jobs will be

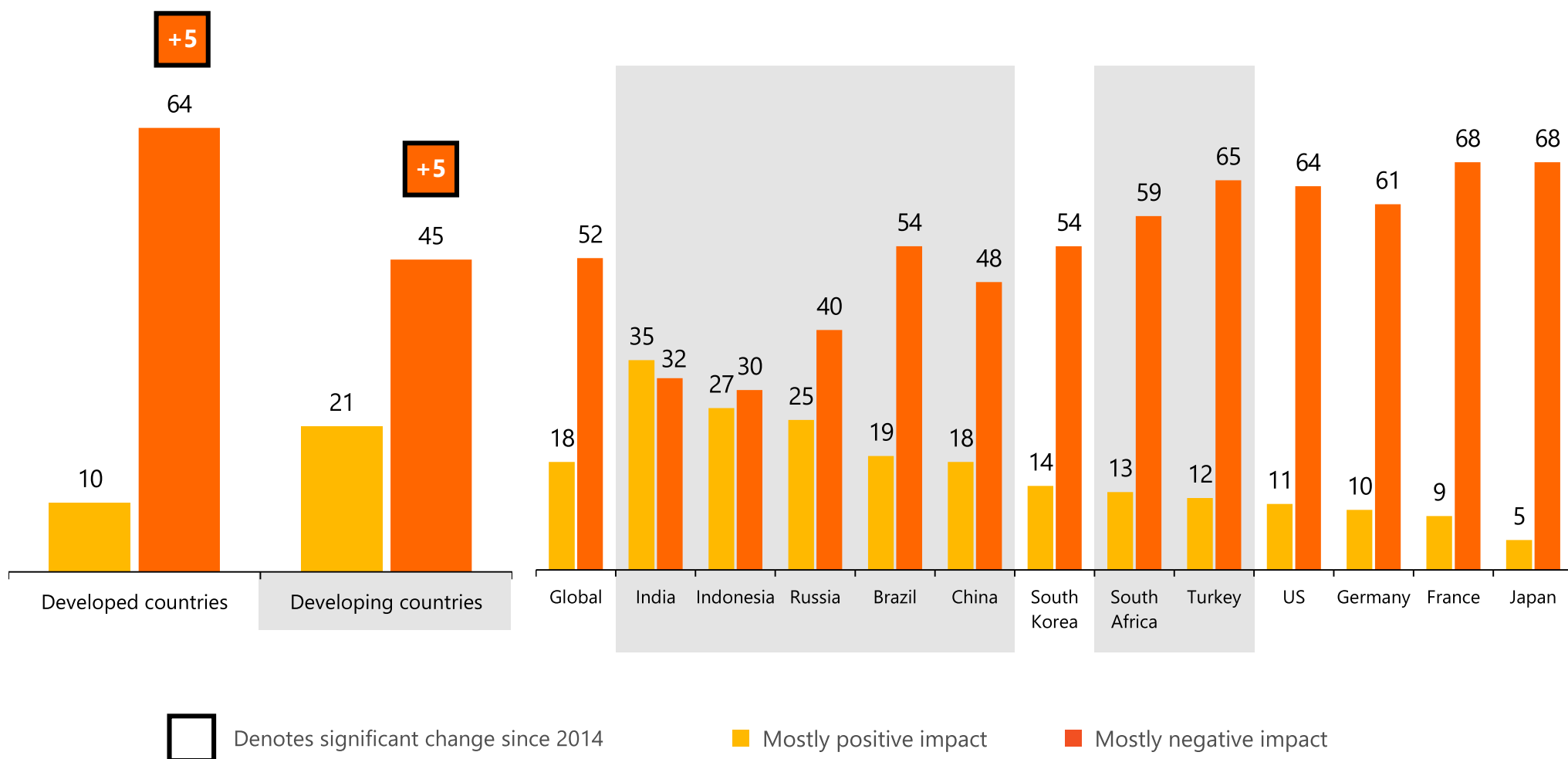
Which of the following fields do you believe will have the best jobs in the future?



The one major concern
about personal technology
that nearly all Internet users
share is privacy

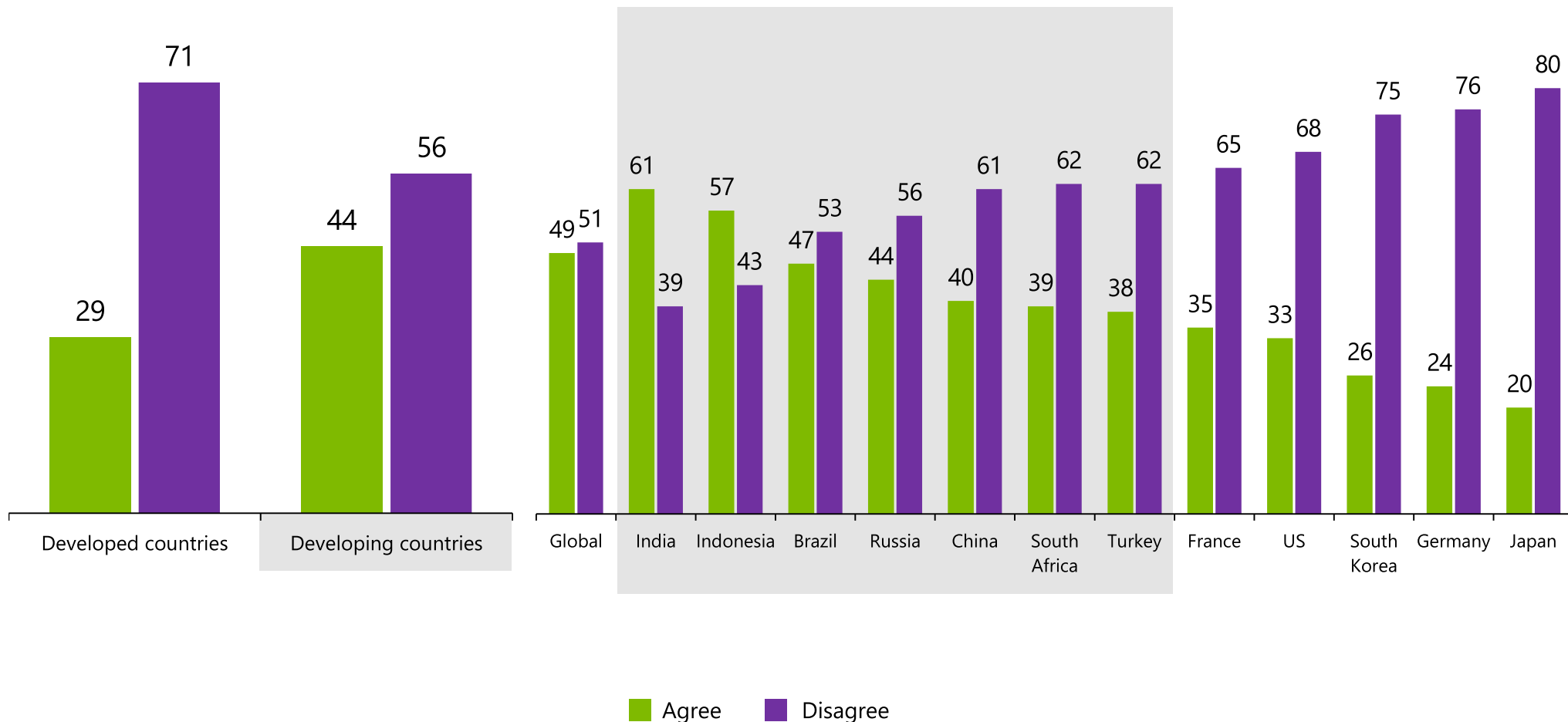
Internet users in every country but India think personal technology has had a negative impact on privacy

Impact of personal technology on privacy



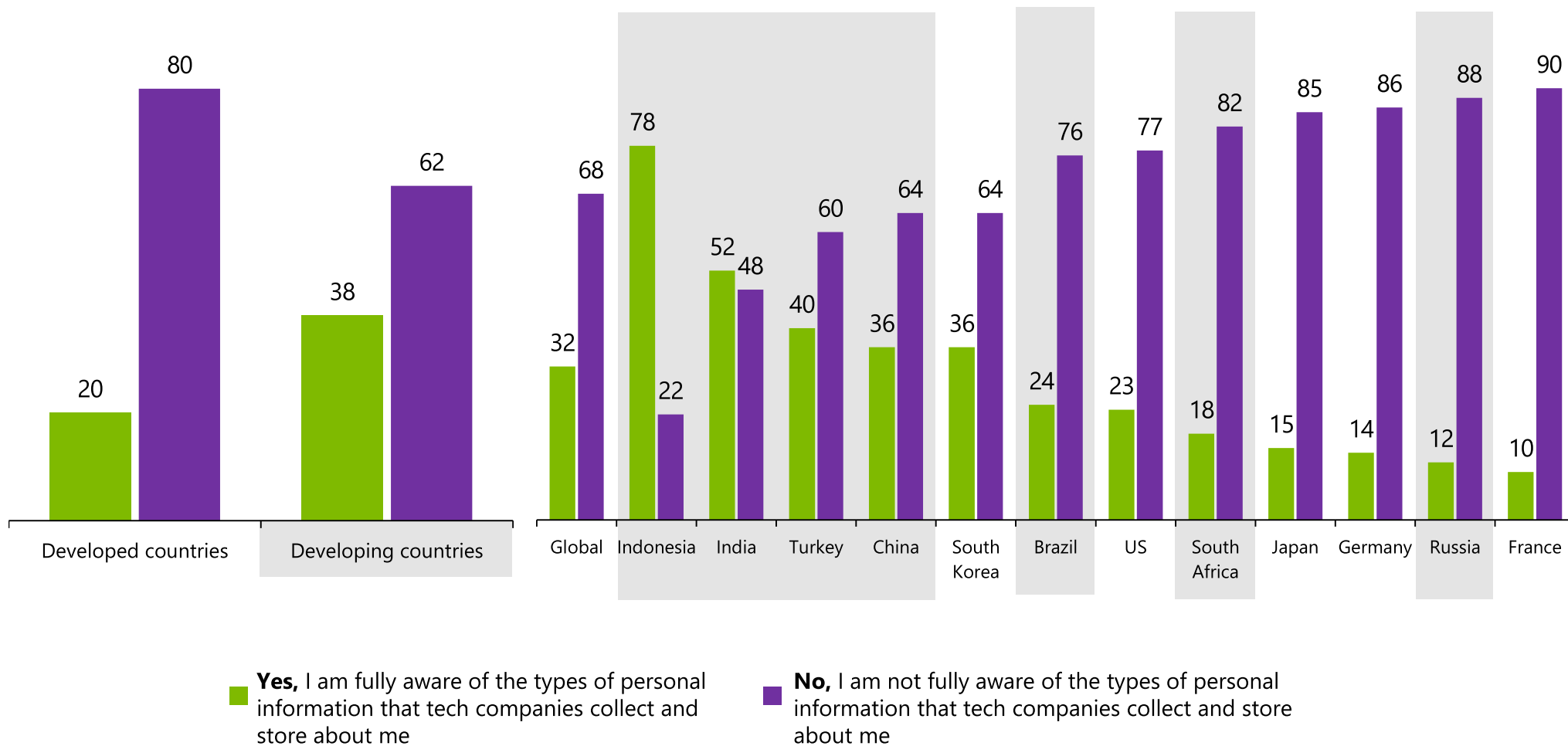
Internet users in nearly all countries believe current legal protections for users of personal technology are insufficient

Current legal protections for users of personal technology are sufficient



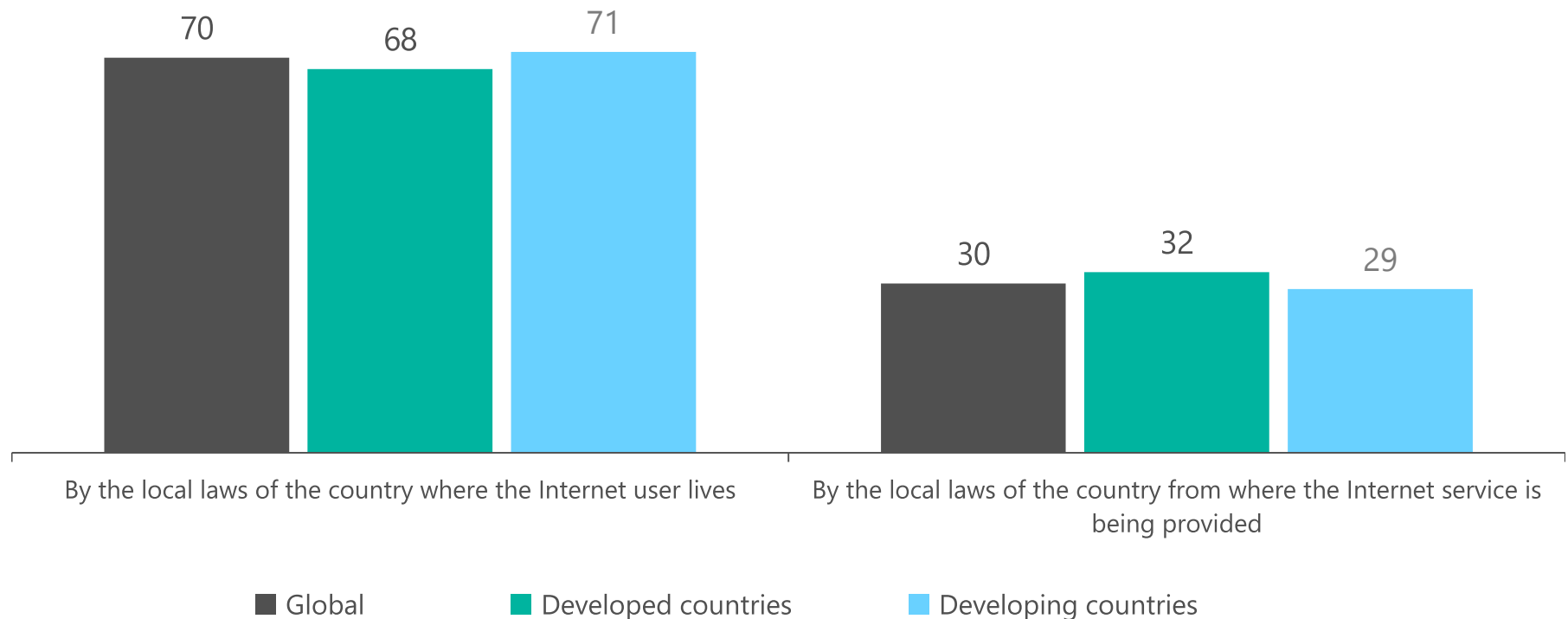
And most Internet users do not feel fully aware of the types of personal information that is collected about them

Awareness of personal data that tech companies collect and store



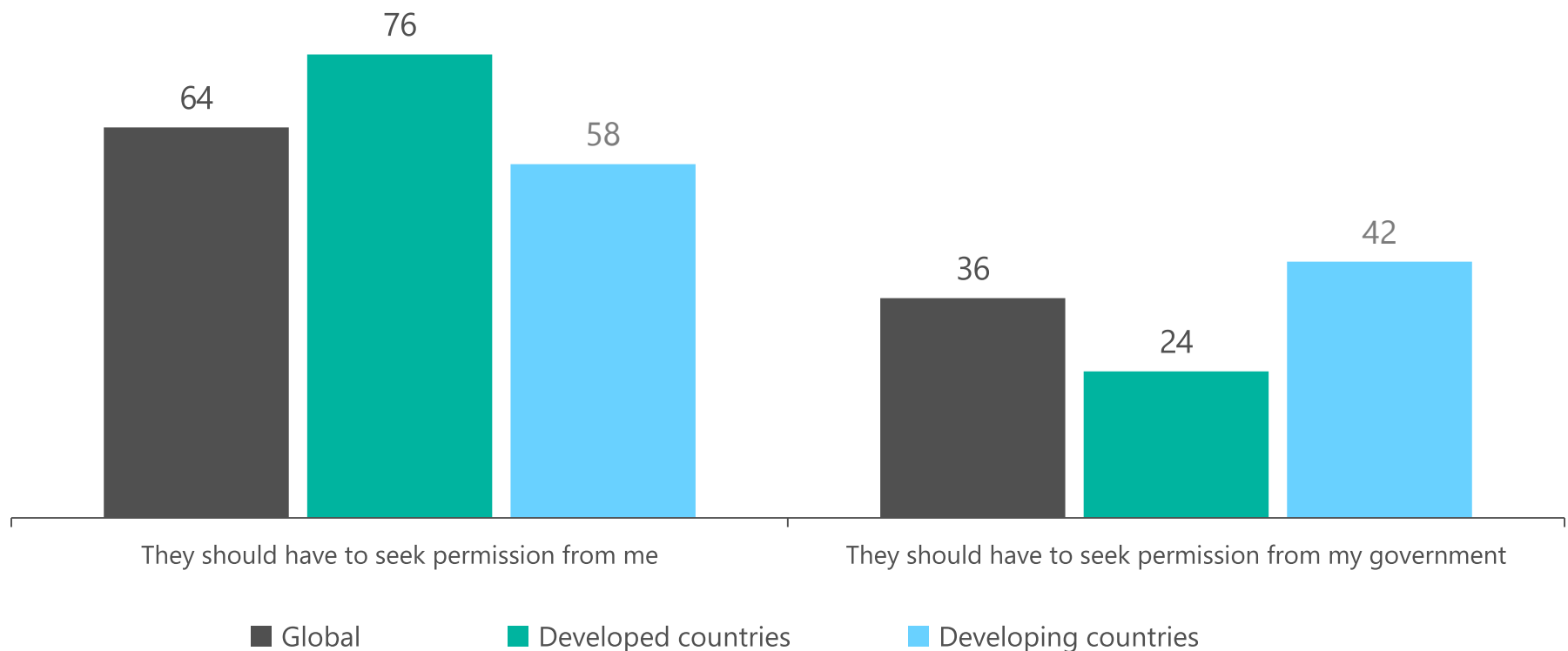
Most Internet users believe the legal rights of Internet users should be governed by the local laws of the country where the users live

Should the legal rights of Internet users be governed...



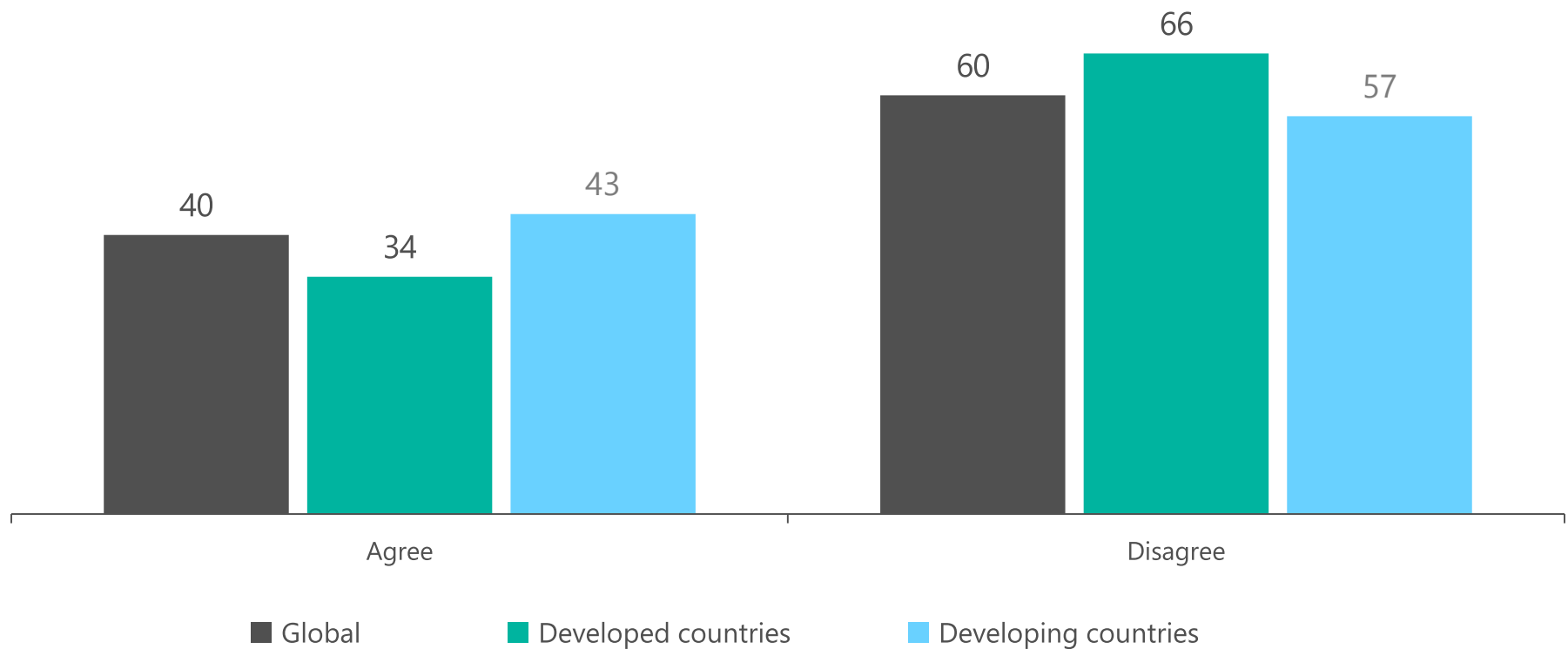
Majority believe that if a foreign government wants information about you stored in a datacenter in your country, they should have to ask you, not your government

If a foreign government wants to access your personal information stored in a datacenter in your country...



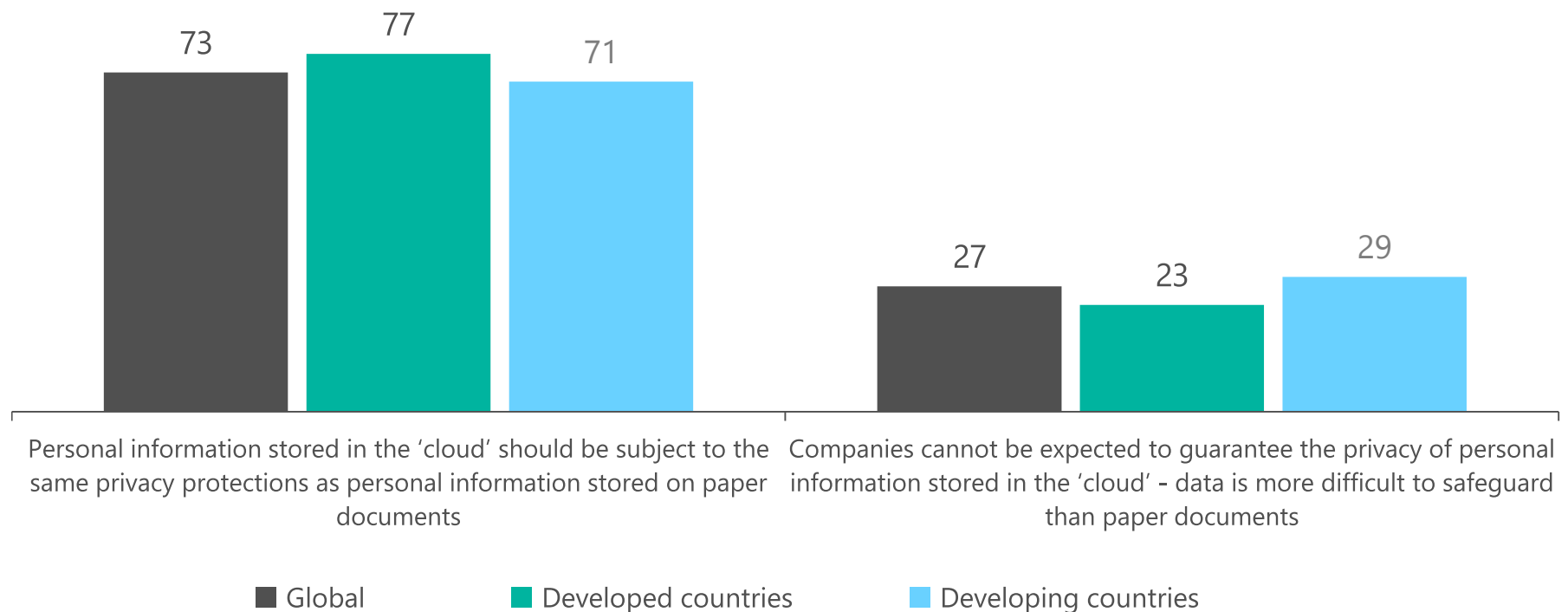
Most Internet users believe police officers should need a search warrant in order to search for personal information on a PC

For the purpose of investigating possible crimes, police officers should be able to search for personal information on a PC without getting a search warrant



Majority of Internet users believe personal information stored in the 'cloud' should be subject to at least the same privacy protections as personal information stored on paper

Safeguarding personal information stored in the 'cloud'





For more information about this study and related insights, please contact:

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The full survey, entitled “Views from Around the Globe: 2nd Annual Poll on How Personal Technology is Changing our Lives” encompasses the views of 12,002 Internet users in the U.S., China, India, Brazil, Indonesia, South Africa, South Korea, Russia, Germany, Turkey, Japan and France. The survey was conducted between December 17, 2014 and January 1, 2015 by the global research-based consultancy Penn Schoen Berland. Survey participants were recruited online in each country. The research was conducted using an online questionnaire in the native language of each country.

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