

CONSUMERS ARE CONCERNED ABOUT THE THREAT OF CYBERATTACKS AND AGREE MORE NEEDS TO BE DONE TO PROTECT THEIR COUNTRY

*Microsoft study evaluates Consumer perceptions of government backed cyberattacks
(Study conducted in the US, Mexico, Germany, France, and India)*

Consumer respondents are concerned about government backed cyberattacks and say they are a serious issue facing their country

- At least two-thirds of Consumers across all markets surveyed (84% US, 85% Mexico, 76% Germany, 66% France, 86% India) are concerned about government backed cyberattacks on their country (See Table 1.1).
- Approximately a third of Consumers in the US (32%) and India (39%) consider cyberattacks to be among the most serious issues in their country. (See Table 1.2).
- A majority of Consumers in the US (61%) and India (57%) think government backed cyberattacks have become a more serious problem in their country in recent years (See Table 1.3).

Consumers think their government is responsible for defending their country from cyberattacks

- Most Consumers across countries surveyed (75% US, 80% Mexico, 71% Germany, 62% France, 69% India) think their government is responsible for defending their country from government backed cyberattacks (See Table 2.1).
- Many also think technology companies have a responsibility to defend their country (49% US, 48% Mexico, 47% Germany, 35% France, 60% India) (See Table 2.1).

Across all markets except India, Consumers think their government is doing too little to defend their country from cyberattacks

- Most think their government is doing too little (62% US, 72% Mexico, 67% Germany, 60% France) (See Table 3.1).

Consumers are more likely to believe that their government needs to work with other governments and technology companies to combat cyberattacks than think their government has all the tools and resources needed to combat cyberattacks

- Over two-thirds of Consumers agree their government needs to work with other governments and technology companies to effectively protect their country from cyberattacks (69% US, 86% Mexico, 80% Germany, 76% France, 69% India) (See Table 4.1).

After reading about an initiative to implement international “rules of the road” for combating cyberattacks and protecting citizens, Consumers express support for the initiative and say they would join a related campaign

- Approximately three-quarters or more of Consumers support the initiative as described (*74% US, 88% Mexico, 83% Germany, 79% France, 91% India*) (See Table 5.1).
- The majority say they are likely to join a campaign intended to influence governments to support the initiative (*58% US, 81% Mexico, 64% Germany, 58% France, 89% India*) (See Table 5.2).

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APPENDIX

About the Study Methodology

PSB conducted research on behalf of Microsoft to explore perceptions of government backed cyberattacks. PSB conducted an online quantitative study from September 20th to September 25th, 2018 among Consumers (general public respondents) in the US, Mexico, Germany, France and India (n=1002 in France, n=1000 in all other markets). The margin of error for the Consumer sample across each market is +/- 2.53% at the 90% confidence interval.

Initiative Description

Respondents were shown the following description:

Instances of governments targeting another country's organizations, infrastructure, or political process through the use of digital weapons is a growing problem. This emerging issue can only be addressed with a new, international initiative where technology companies and governments around the world implement international "rules of the road" to protect their citizens. This initiative would include:

- *Agreements between countries to limit the use of state sponsored hacking cyberattacks*
- *A broad agreement among countries that sets global rules for the development and use of "digital weapons"*
- *Creation of an independent international organization that spans the public and private sectors to investigate and hold countries and other actors accountable for violating the principles of the agreement*

1. DATA ON CONCERNS

**All data displayed below is in percentages*

Table 1.1: Level of Concern

How concerned are you about government backed cyberattacks on your country?	US	Mexico	Germany	France	India
Very concerned	38	42	24	20	54
Somewhat concerned	46	43	51	46	31
Not very concerned	11	12	20	25	10
Not at all concerned	5	3	4	8	4
Top 2 Box	84	85	76	66	86

**Top 2 Box is based on the sum of respondents who selected “Very concerned” or “Somewhat concerned” divided by their total sample size, not the sum of the two percentages*

Table 1.2: Seriousness of Cyberattacks

How serious of an issue is government backed cyberattacks on your country?	US	Mexico	Germany	France	India
Among the most serious issues my country is facing	32	14	20	17	39
Serious , but other issues facing my country are more serious	54	61	61	64	44
Not a serious issue facing my country	5	19	13	8	9
Don't know	9	6	6	10	8

Table 1.3: Cyberattacks becoming More or Less of a Problem

In recent years, do you think government backed cyberattacks on your country have become more or less of a serious problem?	US	Mexico	Germany	France	India
More serious	61	37	51	46	57
Remained the same	27	38	34	39	25
Less serious	4	14	9	3	7
Don't know	9	11	5	13	11

2. DATA ON RESPONSIBILITY TO PROTECT

Table 2.1: Perceived Responsibility

Who do you think is responsible for defending your country's technology users and infrastructure from cyberattacks by other countries? (Select all that apply)	US	Mexico	Germany	France	India
My Government	75	80	71	62	69
Technology Companies	49	48	47	35	60
International Organizations	20	33	26	26	42
Other	2	2	2	0	2
None of these (<i>Exclusive choice</i>)	2	1	3	2	2
Don't know (<i>Exclusive choice</i>)	10	2	8	16	7

3. DATA ON LEVEL OF INVOLVEMENT

Table 3.1: Government Involvement

When it comes to defending your country against government backed cyberattacks, do you think your government is doing too much, enough, or too little?	US	Mexico	Germany	France	India
Too Much	7	5	4	5	24
Enough	18	16	21	21	38
Too Little	62	72	67	60	33
Don't Know	13	7	9	14	5

4. DATA ON GOVERNMENT'S ABILITY TO PROTECT

Table 4.1: Government Resources

Thinking about your country's government, which statement is closer to your point of view?	US	Mexico	Germany	France	India
My government has all the tools and resources it needs to effectively protect its technology users and infrastructure from cyberattacks backed by other governments	31	14	20	24	31
My government needs to work with other governments and technology companies in order to effectively protect its technology users and infrastructure from cyberattacks backed by other governments	69	86	80	76	69

5. DATA ON REACTION TO THE INITIATIVE

Table 5.1: Degree of Support

Based on the description above, how strongly do you support or oppose this initiative?	US	Mexico	Germany	France	India
Strongly support	33	51	38	26	60
Somewhat support	42	36	44	54	31
Somewhat oppose	8	6	7	5	2
Strongly oppose	2	1	1	2	1
Don't know	15	6	9	13	6
Top 2 Box	74	88	83	79	91

**Top 2 Box is based on the sum of respondents who selected "Strongly support" or "Somewhat support" divided by their total sample size, not the sum of the two percentages*

Table 5.2: Likelihood of Joining Campaign

How likely would you be to join a campaign intended to influence governments to support the described initiative?	US	Mexico	Germany	France	India
Very likely	15	29	12	13	50
Somewhat likely	43	53	52	45	39
Not very likely	27	15	29	31	8
Not at all likely	15	4	7	11	3
Top 2 Box	58	81	64	58	89

**Top 2 Box is based on the sum of respondents who selected "Very likely" or "Somewhat likely" divided by their total sample size, not the sum of the two percentages*