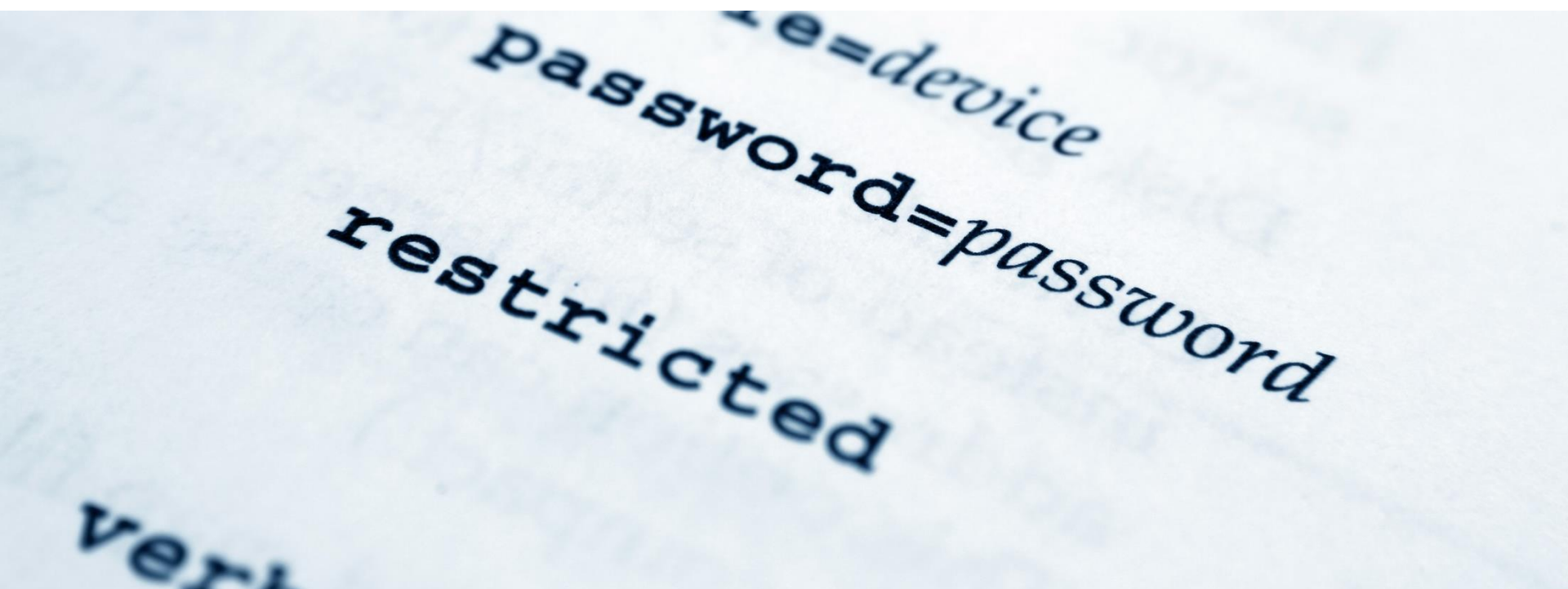


# National Cyber Policy Office

Research into cyber security behaviours and campaign awareness for 'Connect Smart' 2014

**Colmar  
Brunton**  
A Millward Brown Company

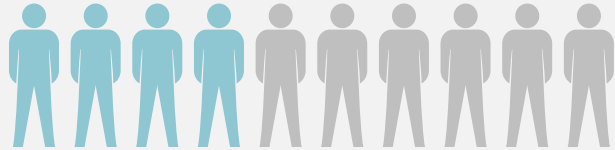
DEPARTMENT  
of the PRIME MINISTER  
and CABINET



A COLMAR BRUNTON REPORT FOR THE DEPARTMENT OF THE PRIME MINISTER AND CABINET

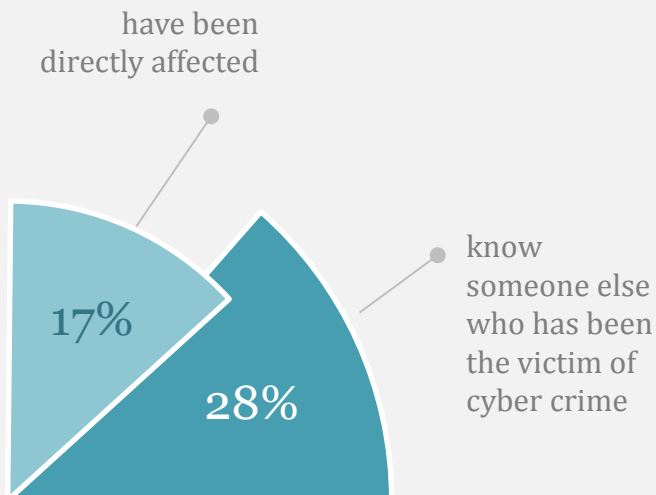
JULY 2014

# Summary



4 in 10

New Zealanders (43%) have been affected by cyber crime themselves, or know someone who has.



01. **Most New Zealanders (84%) proactively take at least some steps to ensure their cyber security** - but only a quarter (28%) do so regularly.
02. **New Zealanders see the need to take cyber security measures** – only 8% of those who are not already regularly taking steps to manage their cyber security say cyber security is not important.
03. **The main barrier to taking more steps to ensure cyber security is confusion over what or who to trust (42%)**. In the post-campaign research there was a drop in people saying the language and content around cyber security is too complicated (from 28% in the benchmark study to 20%).
04. **The most common cyber security actions New Zealanders take are:**
  - **Stopping and thinking before clicking on links/attachments in emails (94%)**
  - **Changing a password on a computer, laptop, tablet or smartphone (73%)**
  - **Updating or installing security software (72%)**
05. New Zealanders are less likely to take action to be cyber secure when using an internet connection (61%) or when maintaining their social media accounts (58%). The post-campaign research showed an increase in people saying they check the security of their internet connection (58% to 63%).
06. A quarter (23%) of New Zealanders have asked someone for advice about how to be more cyber secure
07. **Awareness of the Connect Smart campaign is currently low** – just 3% have heard of it. Among those who are aware of the campaign, TV is the main source of information (38% saw something about the campaign via this communication channel). The campaign is most effective at getting people to think about cyber security issues, which is a great place to start!

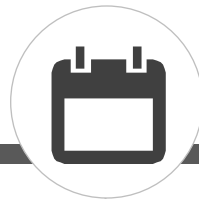
# Methodology



These results measure cyber security behaviours among New Zealanders



This research was carried out by placing questions on Colmar Brunton's fortnightly online omnibus survey

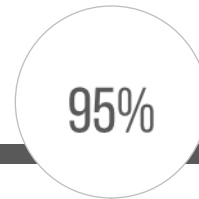


The benchmark wave of research was conducted between 21<sup>st</sup> and 27<sup>th</sup> May 2014.

Post-campaign research was conducted between 2<sup>nd</sup> and 8<sup>th</sup> July 2014.



A total of 2,039 New Zealanders took part in the research: 1,036 in the benchmark survey and 1,003 in the post-campaign research  
Results are weighted by age, gender and region to ensure the results are representative of the New Zealand population



Unless otherwise stated any differences referred to are significant at the 95% level of confidence

## The following margins of error apply:

- For overall results the margin of error is +/-2.2%
- For the benchmark research the margin of error is +/-3.0%
- For the post-campaign research the margin of error is +/-3.1%
- When comparing results between waves of research the margin of error is +/-4.3%

# Notes on reading this report

## Reading results from the online survey

01. The margin of error for a result will vary depending on the variable being examined and the size of the sub-group in question. The maximum margin of error for overall results is +/-2.2%. For the 1,036 people who took part in the benchmark research the maximum margin of error is +/-3.0%. And for the 1,003 survey respondents who took part in the post-campaign research the maximum margin of error is +/- 3.1%. These calculations assume a simple random sample and a 50/50 split for a binary question – for example, ‘yes’ or ‘no’.
02. All stated differences between sub-groups are statistically significant at the 95% confidence level or greater.
03. Please note that sometimes results will not add to 100%. There are two possible reasons for this. For questions where a single response is required, results can vary by 1% due to rounding. Questions where multiple responses are allowed can add to considerably more than 100% as more than one answer can be selected by each person.
04. When two sub-categories are netted together (for example, summing the ‘% take some steps’ and the ‘% regularly take steps’ on the cyber security management question to form an overall proportion of respondents who ‘proactively manage’ their cyber security), the sum of the two sub-categories can be 1% higher or 1% lower than the whole number percentages of the two sub-categories added together. This is due to rounding, with the nett score being more accurate than adding together the results for each sub-category.

## *Please note*

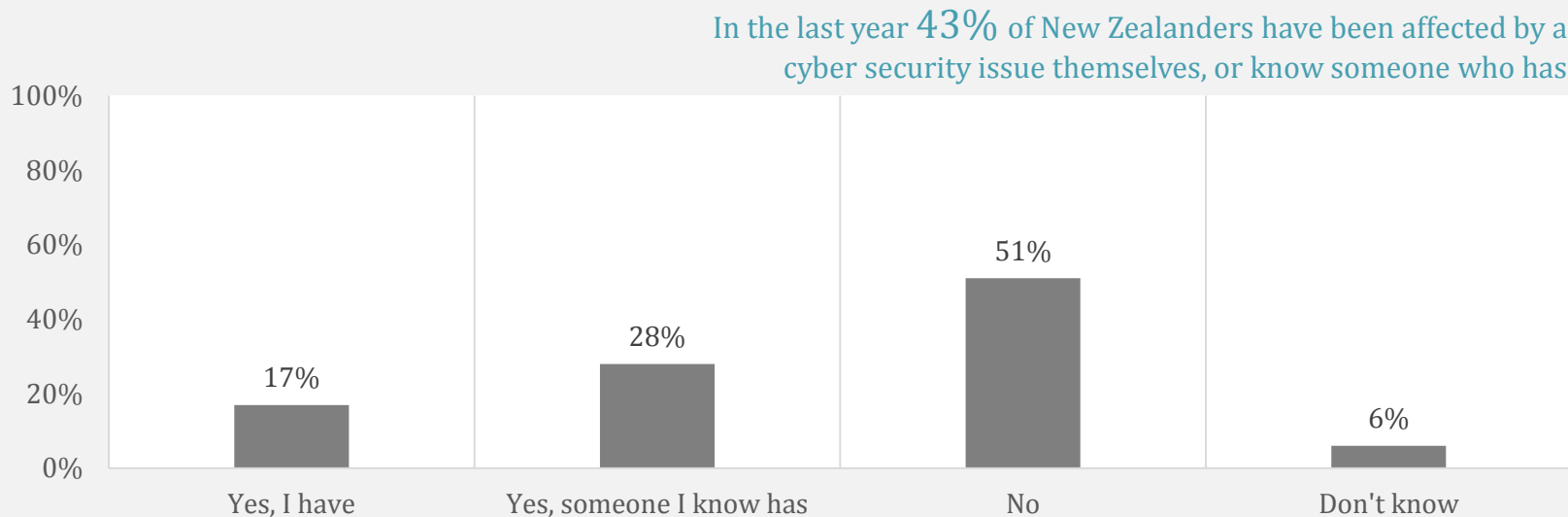
Extensive media coverage of the GameOver Zeus botnet took place between the benchmark and follow up waves of research, and may have had an impact on the results from the follow up wave.

```
AuthName CGI
AuthGroupFile /web/groups
<Limit GET POST>
require groups admin
</Limit>
Directory>
```

## Background - exposure to cyber crime

# One in six New Zealanders report being directly affected by cyber security issues in the last year – even more know someone else who has been affected

Q. Have you or someone you know been affected by a cyber security issue in the last 12 months (i.e. been the victim of identity theft, had your email compromised, had your computer infected by a virus)?



Groups more likely to have been **directly affected** by a cyber security issue

- Men (21% cf. 14% of women)
- People who are self-employed (28%)

Groups more likely to have been affected by a cyber security issue **either directly or indirectly**

- Those identifying as Māori (61%)
- People earning more than \$100,000 p.a. (54%)

Base: All – benchmark (n=1,036)

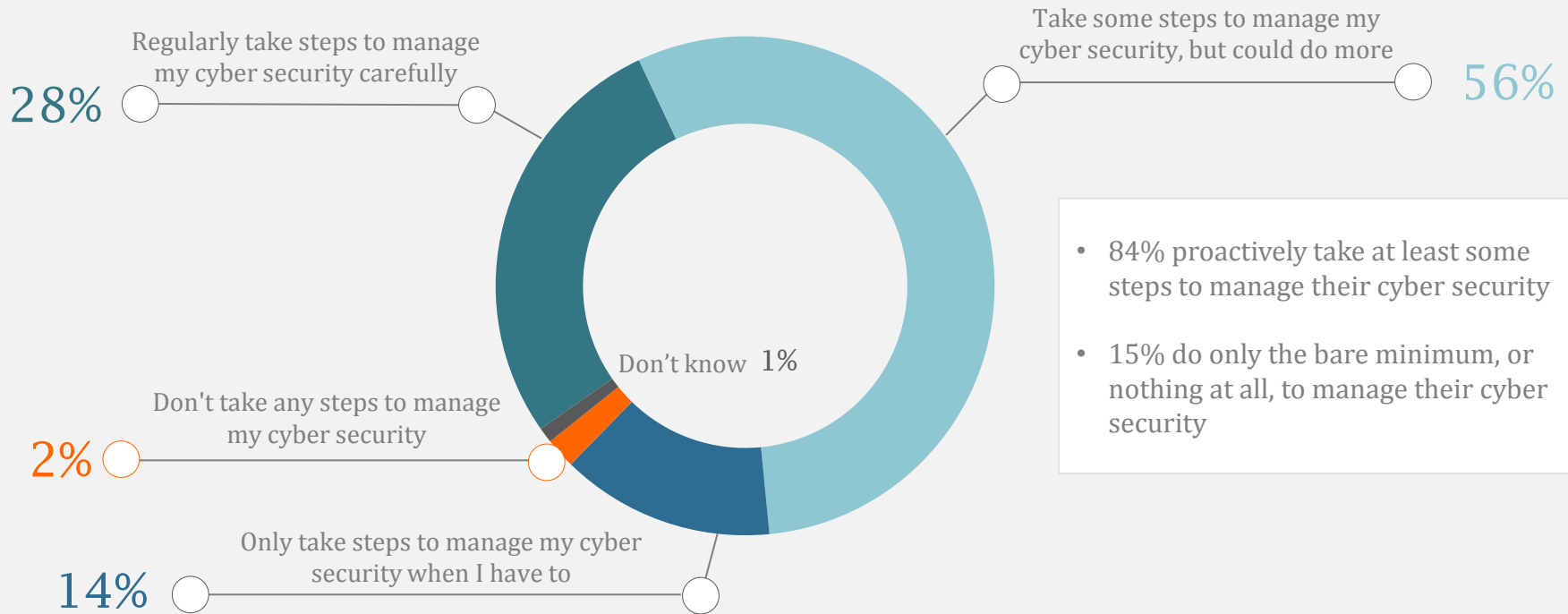
Results do not add to exactly 100% as people could answer 'yes' more than once. Rounding can result in nett figures being 1% higher or 1% lower than the sum of the percentages added together.

```
AuthName CGI
AuthGroupFile /web/groups
<Limit GET POST>
require groups admin
</Limit>
Directory>
```

## Cyber security behaviours

# The majority of New Zealanders take proactive steps to manage their cyber security – but only one in four do so regularly

Q. Which statement best describes your approach to cyber security?



Groups **more likely** to proactively take steps to manage their cyber security

- Those earning more than \$100,000 p.a. (88%)

Groups **less likely** to take steps to manage their cyber security

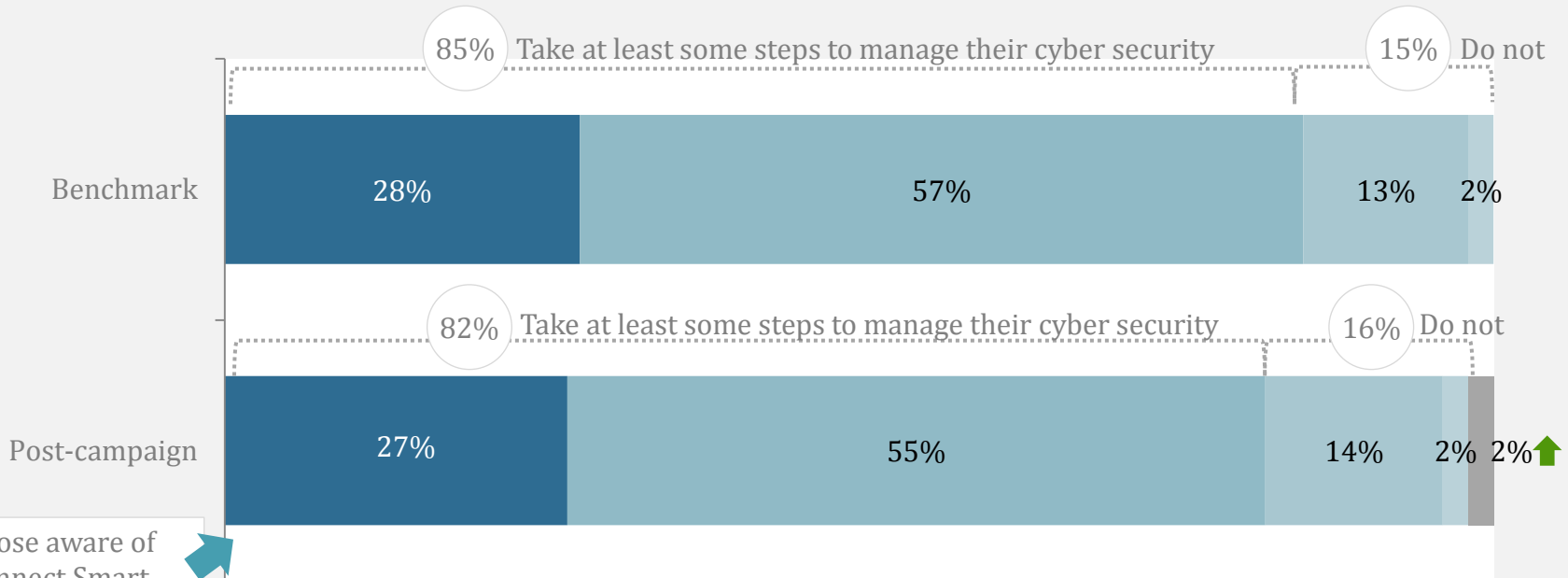
- Younger people, aged 18 to 34 years (80%)
- Those identifying with an Asian ethnicity (66%)
- Those identifying with a Pasifika ethnicity *appear* less likely to take steps to be cyber secure (57% - result based on n=17 people so must be treated with caution)

Base: All (n=2,039)  
Results may not add to exactly 100% due to rounding. Rounding can also result in net figures being 1% higher or 1% lower than the sum of the percentages added together.



# There has been no change in the proportion of people who take steps to manage their cyber security

Q. Which statement best describes your approach to cyber security?



Those aware of Connect Smart (n=30) are more likely to say they regularly take steps to manage their cyber security (55%)

- Regularly take steps to manage my cyber security carefully/proactive about being cyber secure
- Take some steps to manage my cyber security but could do more
- Only take steps to manage my cyber security when I have to (e.g. when I'm required to change a password)
- Don't take any steps to manage my cyber security
- Don't know

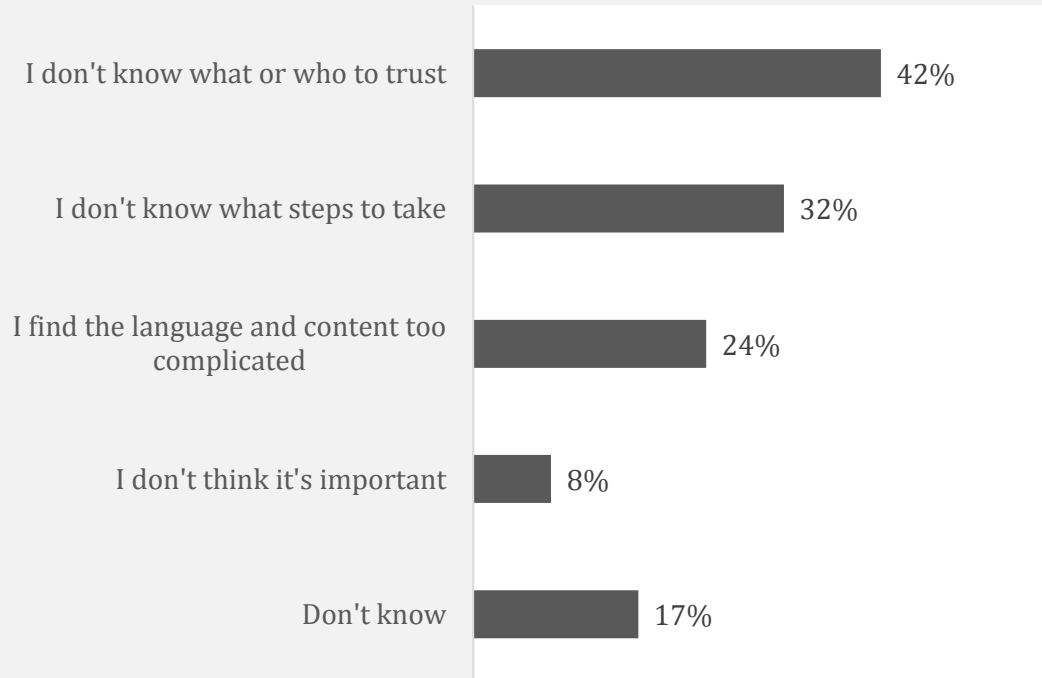
↑ ↓ Significantly different from previous wave.

Base: All – benchmark (n=1,036), post-campaign (n=1,003)

Results may not add to exactly 100% due to rounding. Rounding can also results in nett figures being 1% higher or 1% lower than the sum of the percentages added together.

# Confusion is the main barrier to taking more steps to manage cyber security – many New Zealanders don't know what or who to trust in this area, and for one in three people there is confusion over what steps to take to be cyber secure

Q. Why don't you take more steps to manage your cyber security?



More likely to be mentioned by:

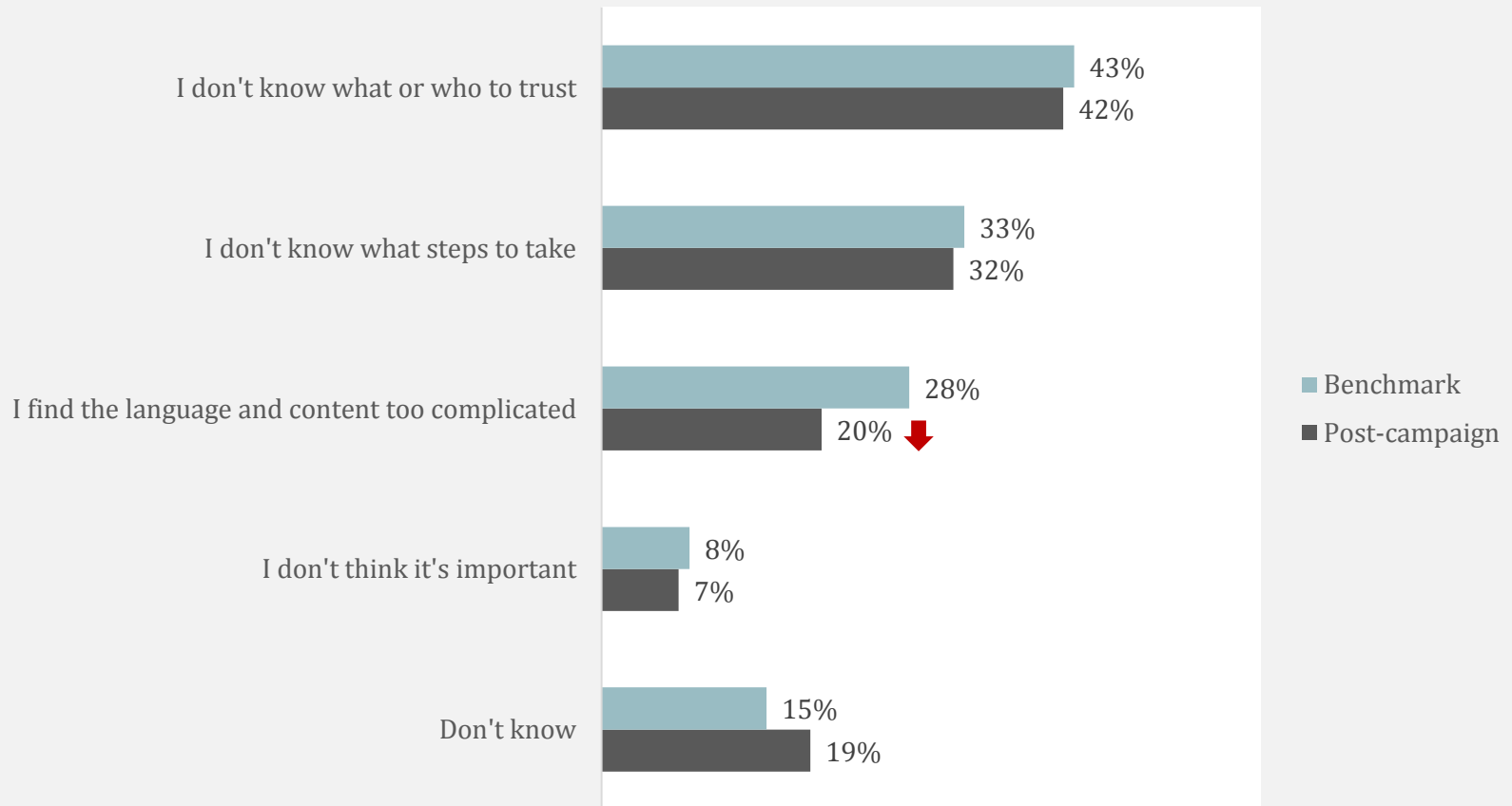
- Those working part time (50%)
- Women (37% cf. 25% of men)  
People in Christchurch (41%)
- People 55+ (38%)  
Those living outside the main centres of the upper North Island (40%)  
Those identifying with an Asian ethnicity (35%)  
Those outside paid employment (32%)
- Men (12% cf. 4% of women)

↑ ↓ Significantly different from previous wave.

Base: All who do not regularly take steps to manage their cyber security (n=1,491)

# Post-campaign results show a decrease in people saying they find the language and content around cyber security too complicated

Q. Why don't you take more steps to manage your cyber security?

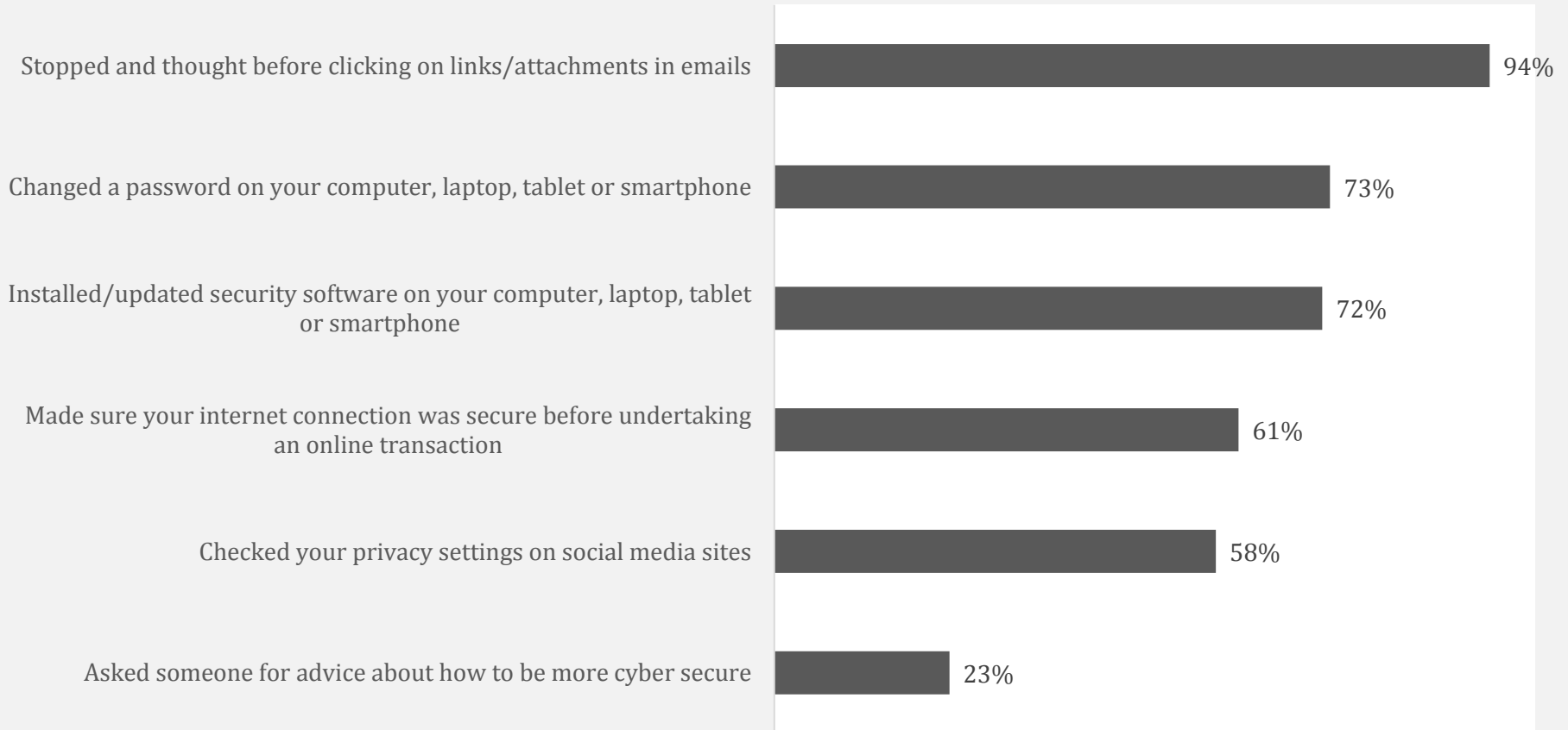


↑ ↓ Significantly different from previous wave.

Base: All who do not regularly take steps to manage their cyber security - benchmark (n=756), post-campaign (n=735)

New Zealanders are cautious about links/attachments in emails and are reasonably good at maintaining passwords and keeping security software up to date. However far fewer pay attention to their internet or social media settings

Q. Which, if any, of the following have you done in the last three months to help manage your cyber security?



# Significant differences by sub-group

Q. Which, if any, of the following have you done in the last three months to help manage your cyber security?

ACTION	Total	Differences by gender*	Differences by age	Differences by region	Differences by ethnicity	Differences by employment status	Differences by personal income
Stopped and thought before clicking on links or attachments in emails	94%		18 to 34 (92%)		Asian (89%)		
Changed a password on your computer, laptop, tablet or smartphone	73%	Men (78%, cf. 67%)	55+ (67%)	Nelson (57%)		Outside paid work (64%)	<\$20k p.a. (65%) \$20 - \$50k p.a. (67%) >\$100k p.a. (80%)
Installed or updated security software on your computer, laptop, tablet or smartphone	72%	Men (79%, cf. 66% of women)	18 to 34 (68%) 55+ (77%)	Christchurch (83%)			
Made sure your internet connection was secure before undertaking an online transaction	61%	Men (63%, cf. 58%)	18 to 34 (53%) 55+ (69%)	Living outside main cities/towns in upper NI (77%)		Outside paid work (66%)	
Checked your privacy settings on social media sites	58%	Men (53%, cf. 62% of women)	18 to 34 (69%) 55+ (41%)	Whangarei (45%) Napier/Hastings (44%)		Part-time workers (66%)	
Asked someone for advice about how to be more cyber secure	23%	Men (25%, cf. 21% of women)	55+ (31%)		Asian (34%)	Part-time workers (35%)	<\$20k p.a. (32%)

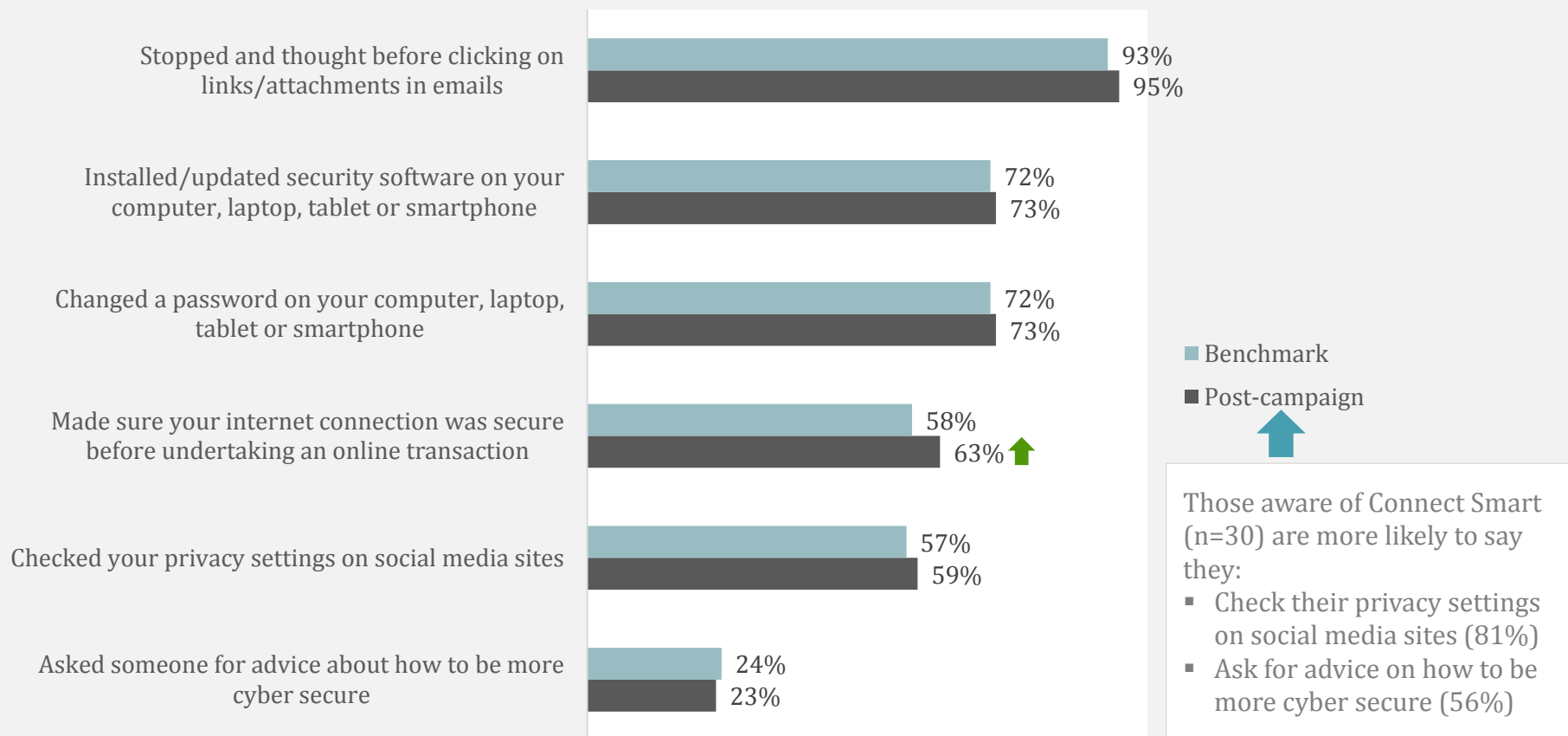
*Please note*

Results shown in black are higher than average, results in red are lower than average

\* Results compare men with women, not against the average

# More New Zealanders say they check the security of their internet connections now than prior to the Connect Smart campaign

Q. Which, if any, of the following have you done in the last three months to help manage your cyber security?



↑↓ Significantly different from previous wave.

Base: All - benchmark (n=1,036), post-campaign (n=1,003)

Very few New Zealanders are aware of the Connect Smart campaign. What awareness there is primarily comes from TV coverage of the campaign, although recall of online coverage of the campaign in the content of a website, in newspapers/magazines or from word of mouth are also relatively frequently mentioned

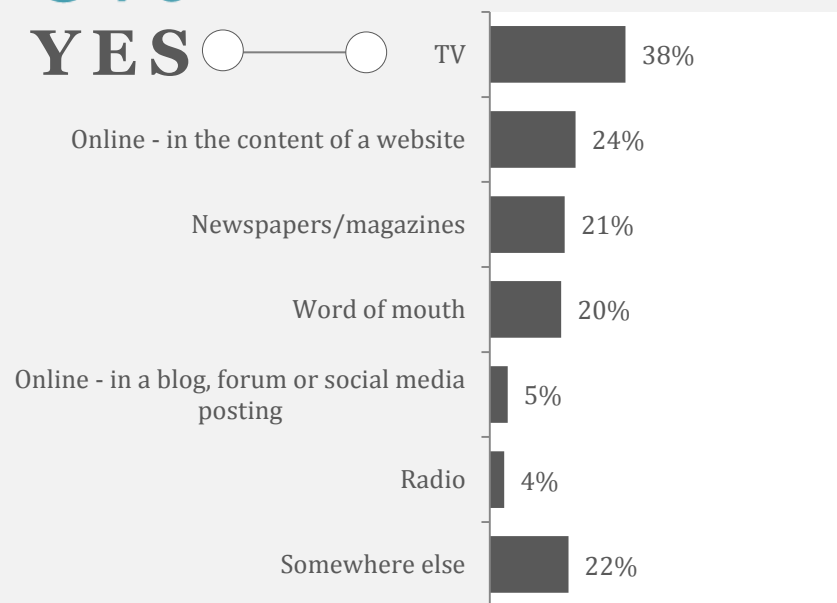
Q. Have you heard of Connect Smart?



Q. Where did you see or hear something about the Connect Smart campaign?

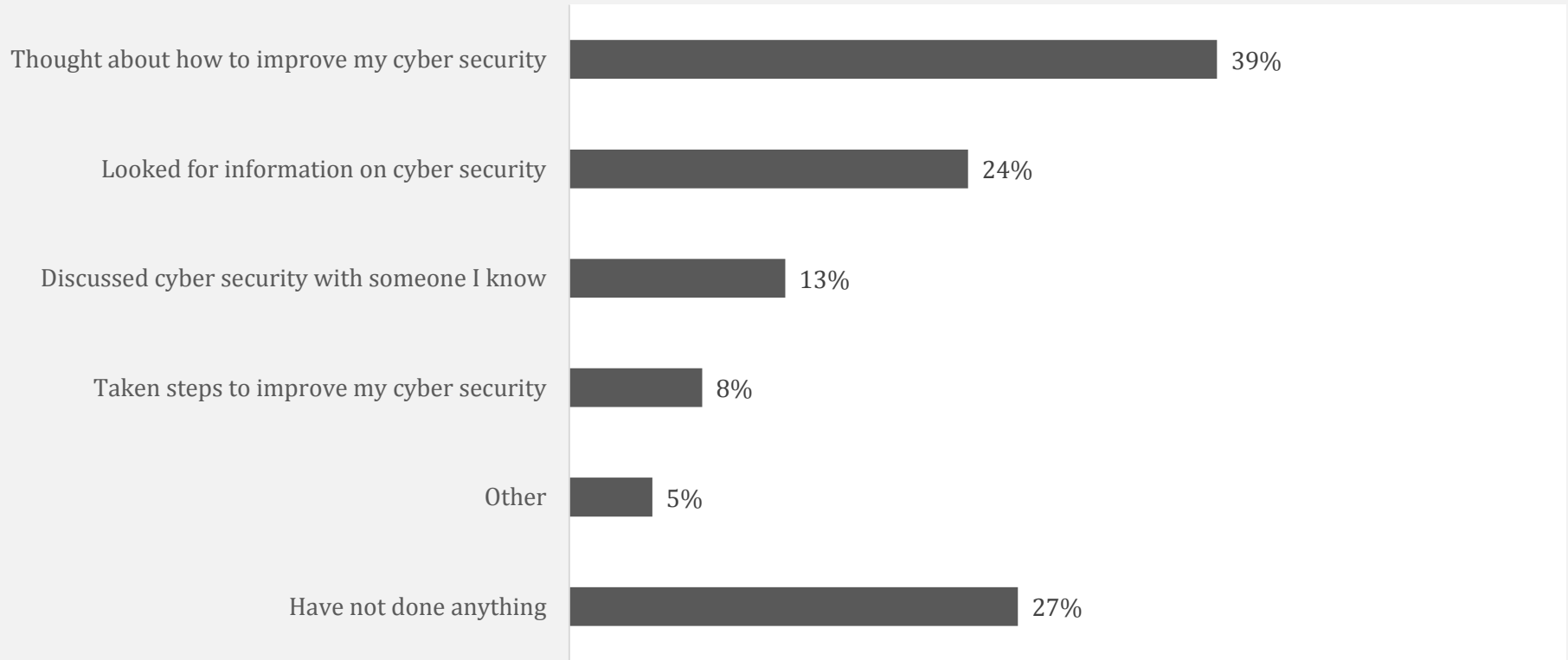
3%

YES



Among the few people aware of the campaign the most common response was to think about how to improve their cyber security. As well as getting people thinking, the campaign prompted one in four of those aware of Connect Smart to look for information on cyber security

Q. Which of these have you done as a direct result of seeing or hearing about Connect Smart?







For further information please contact:

## Anne Harris

Colmar Brunton, a Millward Brown Company  
Level 9, Legal House  
101 Lambton Quay  
PO Box 3622  
Wellington 6011  
Phone (04) 913 3003 | Fax (04) 913 3001  
[www.colmarbrunton.co.nz](http://www.colmarbrunton.co.nz)