



Deutsches Institut
für Vertrauen und
Sicherheit im Internet





**DIVSI study
on freedom versus regulation
on the Internet**



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A representative population survey carried out
by the Allensbach Institute (Institut für Demoskopie Allensbach – IfD)
on behalf of the German Institute for Trust and Safety on the Internet
(Deutsches Institut für Vertrauen und Sicherheit im Internet – DIVSI)



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Freedom versus regulation on the Internet

In its relatively short life-time, DIVSI has already produced a range of acclaimed papers, studies and investigations. In these publications, we have often managed to address topical issues and problems of great relevance and importance while simultaneously providing solutions in the form of scientifically proven findings.

I am sure that this new study, "Freedom versus regulation on the Internet", carried out by the renowned Allensbach Institute, will fully earn its place next to these previous studies.

But first a brief review. The DIVSI background study on trust and security on the Internet, the starting point of our representative investigations, examined with an almost hitherto unseen precision the motivations and attitudes of people living in Germany when it comes to their relationship with the Internet. The investigation also describes the expectations these people have in terms of safety and data privacy on the Internet.

The policy study conducted thereafter focused for the first time on decision-makers in the fields of economics, politics, the media, science and society. This investigation illustrated their thoughts, objectives and assessment regarding responsibilities in our digital world. Never before had it been so clear that those in power actually wish to "pass the buck", so to speak, and shift responsibility for security on the Internet back to the users themselves.

Faced with this potential for conflict, it made sense to take another, closer look at the user perspective: How safe do Germans feel when using the Internet? How much freedom and self-regulation do they want? How much regulation is called for?

These are the questions that the "Freedom versus regulation on the Internet" study focuses on. To do this, a survey was conducted among approximately 1,500 persons in October

2013, providing a detailed impression of how Germans use the Internet, and how they perceive the associated benefits and risks, alongside state and business-related influences.

Without setting out the results and findings at this stage, I would like to point out three issues that I found particularly interesting:

- Germans are well aware of the benefits and opportunities offered by the Internet. At the same time, however, they are concerned about the risks faced by users of the Internet
- As individual solutions, users predominantly use technical means of protection or seek to avoid any potential danger. In this, data analysis by companies that run online shops or search engines, for example, is viewed as a threat to freedom on the Internet
- The state is also seen as having a protective role in the digital environment.

If the state is required to play a role, it must be considered what framework conditions are required to ensure that the state is able to exert influence here and what form this "binding leadership" by the state would actually take in the digital world. But this immediately raises the question as to whether the state could ever meet this expectation. In any case, the users must not be left on their own; they must be taken seriously in their wish for "guardrails" in the digital environment.

I hope that you find this DIVSI study "Freedom versus regulation on the Internet" informative, and would be pleased to receive any critical observations.

Matthias Kammer
Director
DIVSI

Introduction

Increasing numbers of people are now using the Internet and making the most of the variety of options it provides in terms of information, communication and entertainment. The Internet is also becoming increasingly important as a transaction platform, with the number of people making a proportion of their purchases online or using various different Internet services rising constantly.

This study, conducted on behalf of the German Institute for Trust and Safety on the Internet (DIVSI), is concerned with the question of which benefits and risks the population, and particularly the users, associate with the Internet, how safe they feel when using the Internet, what kind of experiences they have had, and how they try to protect themselves against possible dangers. The key question addressed by the investigation was the significance attributed to constantly free and independent use of the Internet against the background of these assessments and experiences, and the extent to which it is deemed necessary to provide greater control and regulation of the Internet and its content. The intensity and main areas of Internet use were also determined.

The results are based on a survey of 1,487 people who constitute a representative cross-section of the population aged 16 years and older in the Federal Republic of Germany. The interviews were conducted verbally and face-to-face between 1 and 14 October 2013.

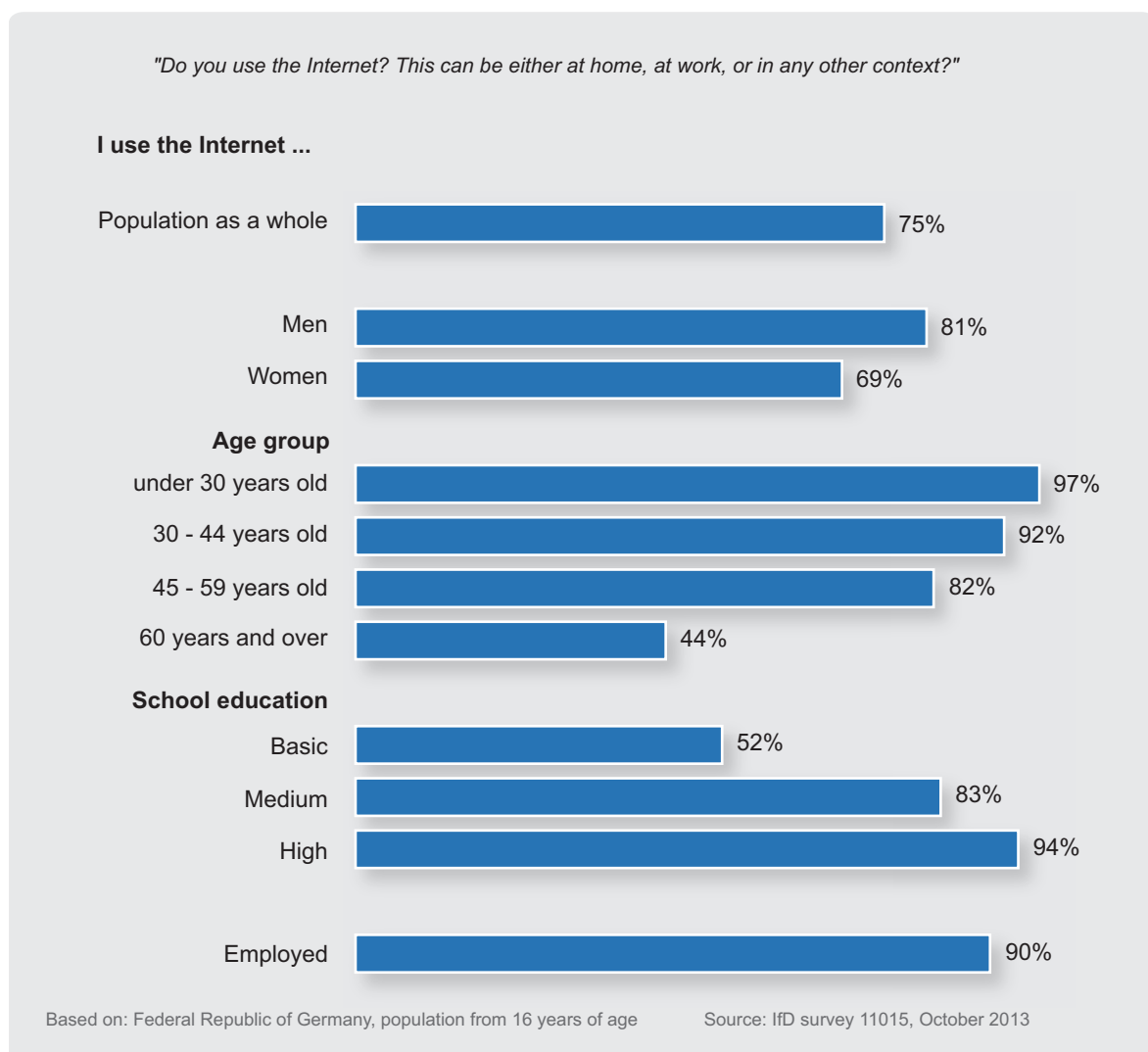
Allensbach am Bodensee, December 2013

Allensbach Institute (IfD)

1. Significance of the Internet

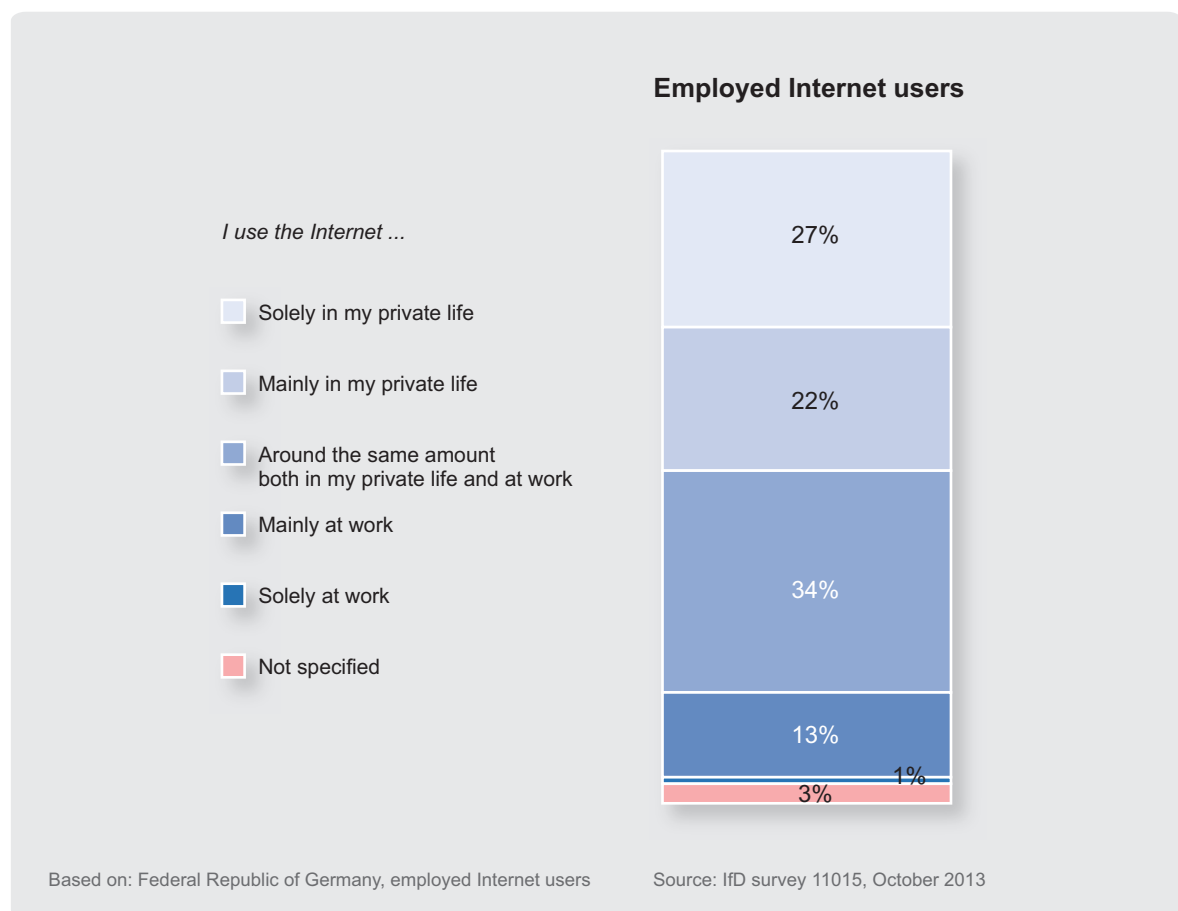
For the vast majority of the population, the Internet is a fixed feature of their day-to-day lives. 75–81 % of men and 69 % of women use the Internet at home, at work or on other occasions, and for the younger generation, using the Internet is a given. 97 % of under-30s and 92 % of 30-44-year-olds use the Internet, and at 82 %, the figure is not much lower for 45-59-year-olds. At the moment, only the figure for the age group of 60 and over is significantly lower, but even here the proportion is still 44%. The extent to which a person uses the Internet is also largely dependent on their particular educational background. People with lower educational qualifications go online far less frequently than those with university entrance or higher education qualifications.

Internet as part of day-to-day life



The Internet also plays a key role in the workplace. The vast majority of job holders also use the Internet at work; only 27 % use the Internet solely in their private lives. In total, however, private use remains predominant. One in three people have an equal balance of work-based and private Internet use.

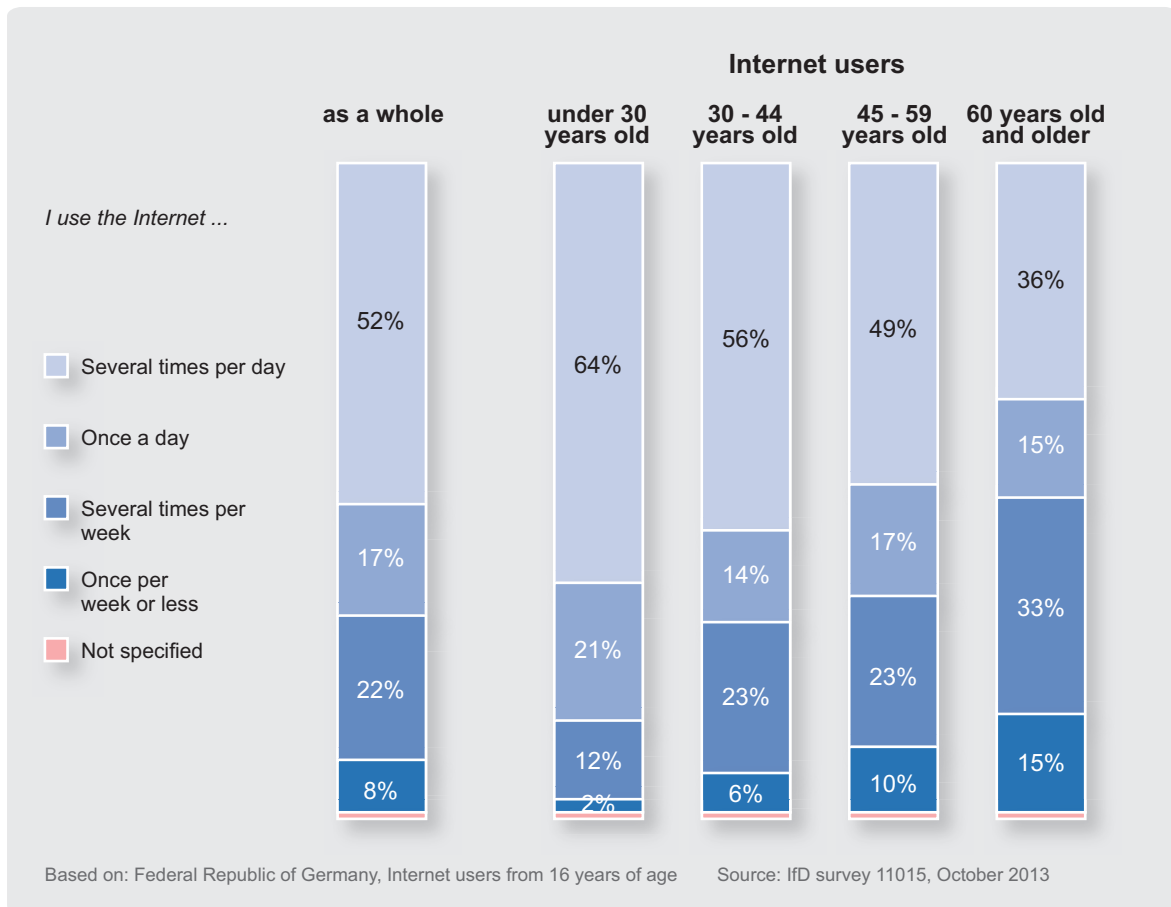
Private and work-based Internet use



Frequency and scope of Internet use

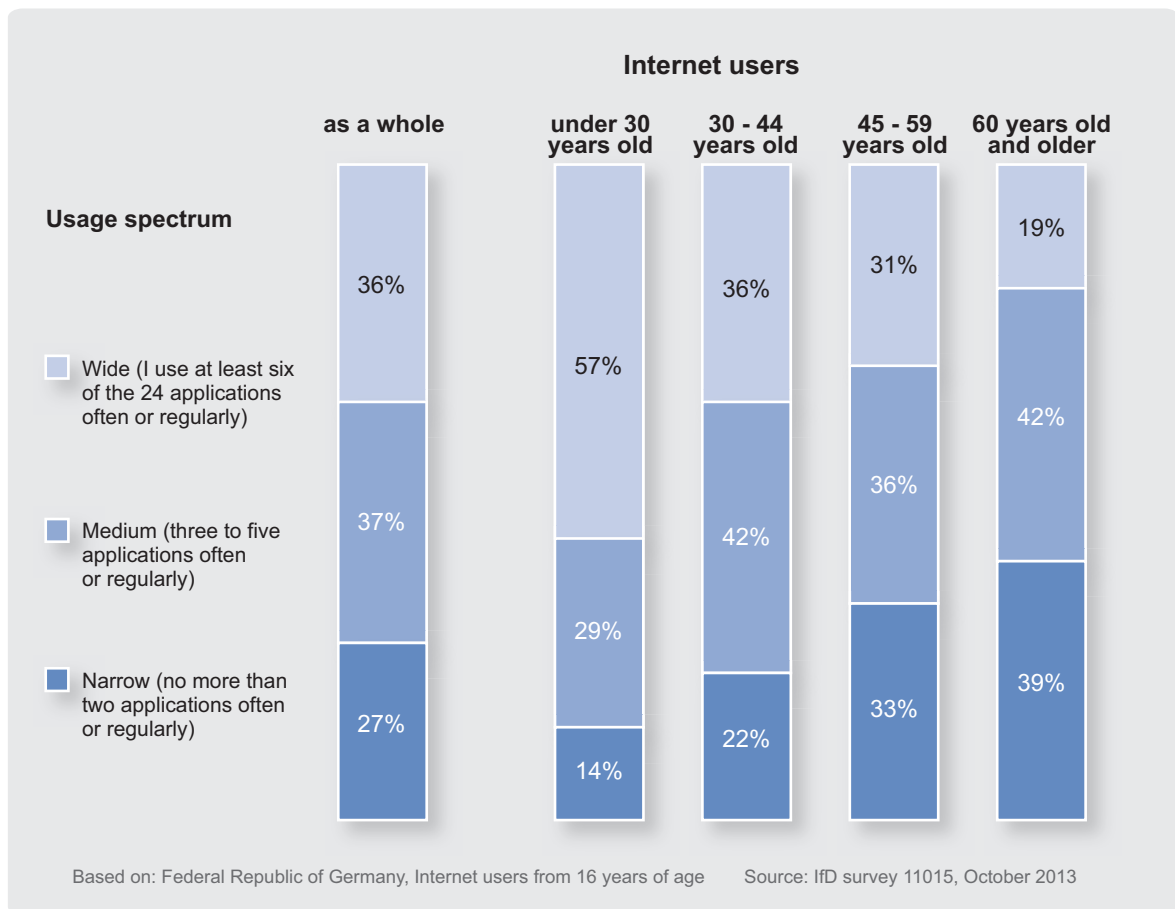
The vast majority of users access the Internet every day, with more than half doing so several times per day. Only one in ten people use the Internet just once a week or less. In the younger generation, not only is the user group wider, the intensity of use is also higher. 64 % of under-30s and 56 % of 30-to-44-years olds use the Internet several times per day. This number is just 36 % among users aged 60 and over, but almost half of this age group use the Internet at least once a day.

High intensity of use



The spectrum of use is even more age-related than the intensity. Not only do young Internet users use the Internet more frequently; they also make far wider use of it. 57 % of under-30s often or regularly use at least six of the 24 services and applications mentioned in the interview (see graphic on page 11/12). At just 36 %, this figure is significantly lower even in the age range of 30-44, and drops to just 19 % among users aged 60 and over. The spectrum of use here is also correspondingly narrow; whereas 39 % of the oldest user group specified the use of no more than two services regularly, this figure was just 14 % in the under-30s user group.

Significantly wider spectrum of use among the under-30s



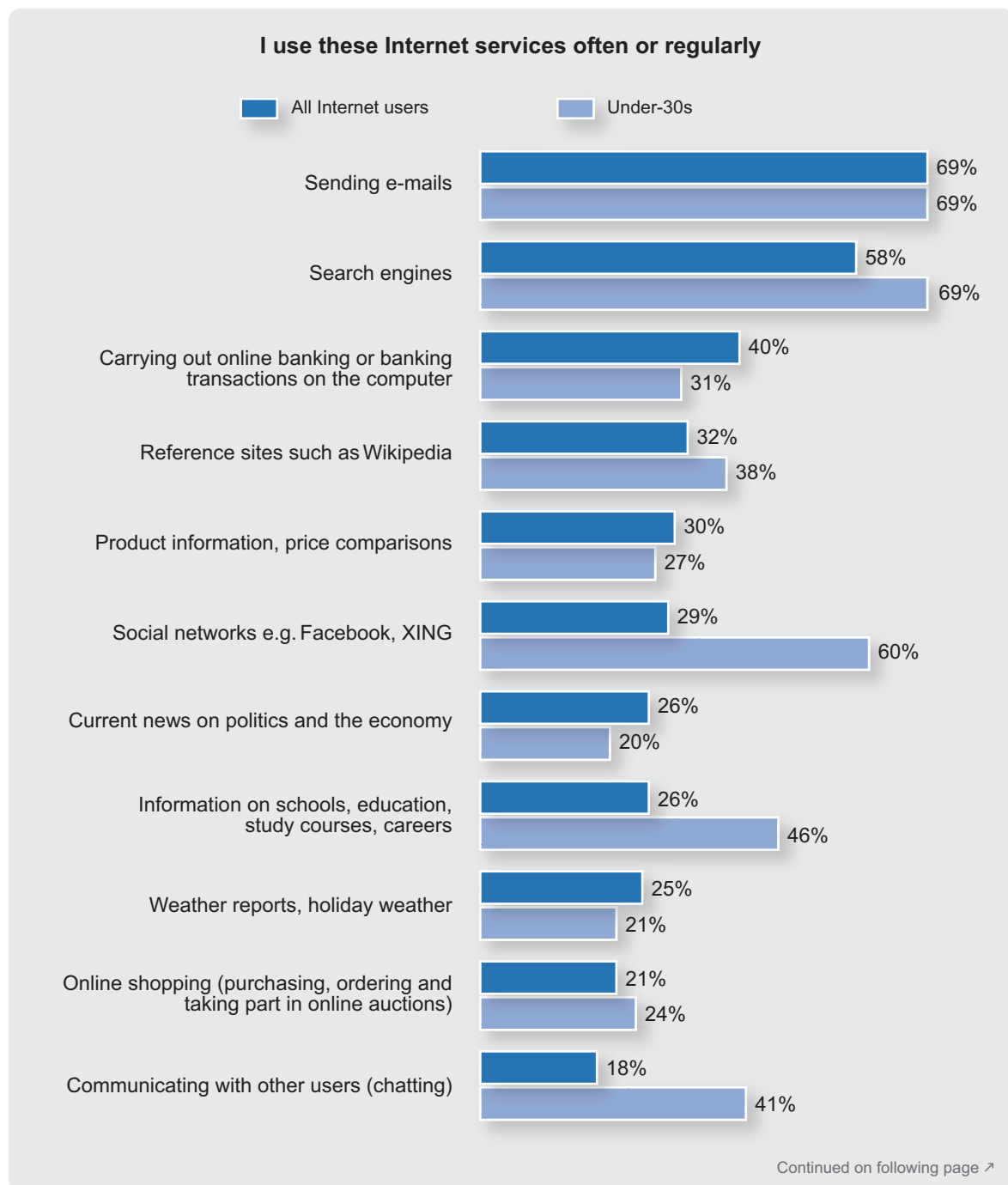
Focuses of Internet use

Communicating with other users and operating search engines to acquire information predominated in the structure of use. 69 % of Internet users regularly send and receive e-mails, and 58 % use search engines to conduct specific information searches. Trailing by a large margin, this is followed by the use of online banking and reference sites such as Wikipedia, also searches for product information or to compare prices.

The wider spectrum of use observed in the younger user group relates primarily to the fact that not only do they carry out an above-average number of online searches for information on schools, education and careers, they also place a much higher value on the specific communication options available to them. 29 % of all users, but 60 % of under-30s, are continually engaged in sharing information with others on social networking sites. Likewise, just 18 % of all users regularly use online chatrooms, whereas this figure rises to 41 % in the youngest user group. In the youngest user group, the Internet also plays an above-average role as an entertainment medium; just 15 % of all Internet users, but 32 % of under-30s, regularly use portals such as YouTube or MyVideo to watch videos or

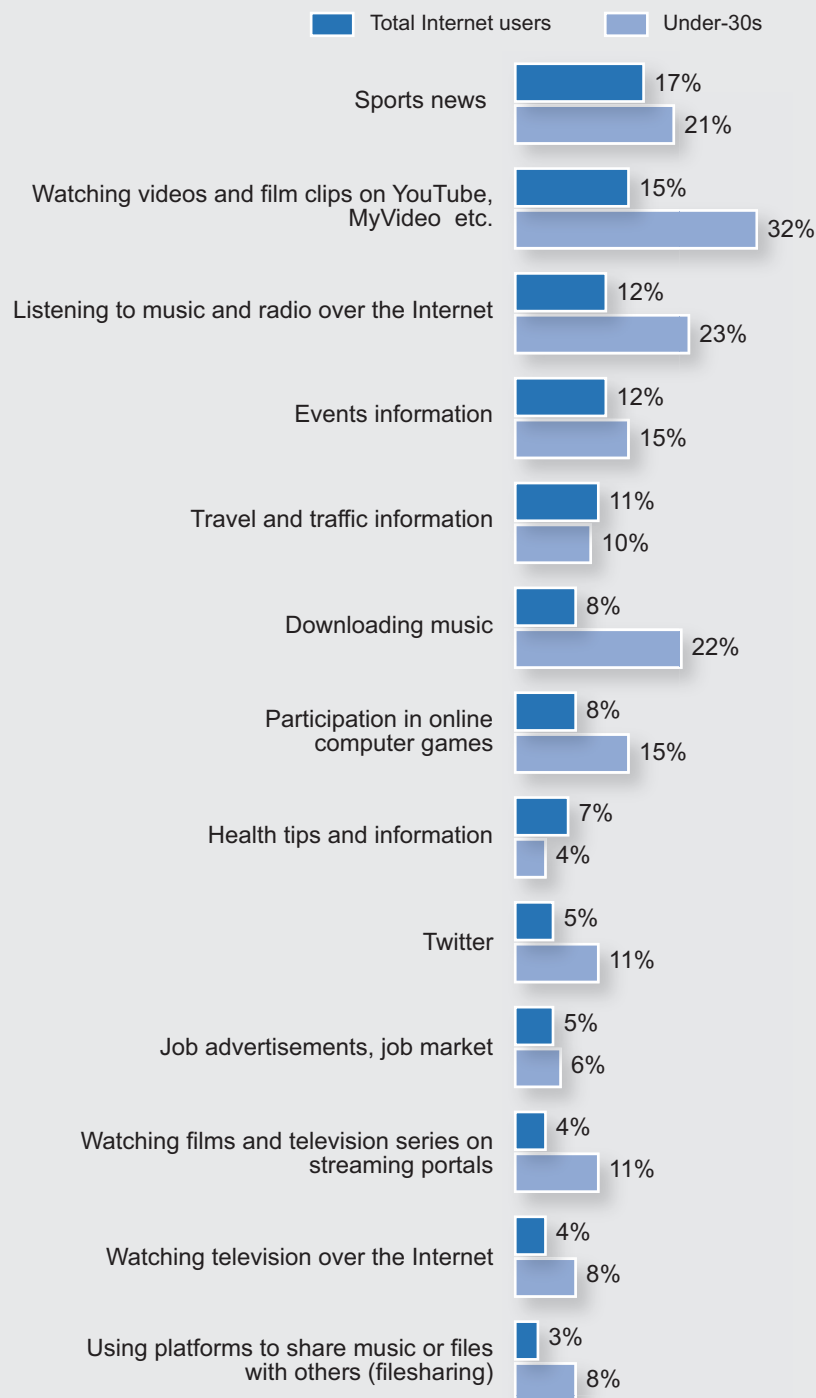
film clips online. Similarly, the under-30s make far more frequent use of the option of downloading music from the Internet, playing online computer games, listening to the radio over the Internet and watching films of television series on streaming portals. Nevertheless, 8 % of under-30s, but just 3 % of all users, regularly access platforms that allow them to share music and films with others.

Current Internet use structure



Current Internet use structure

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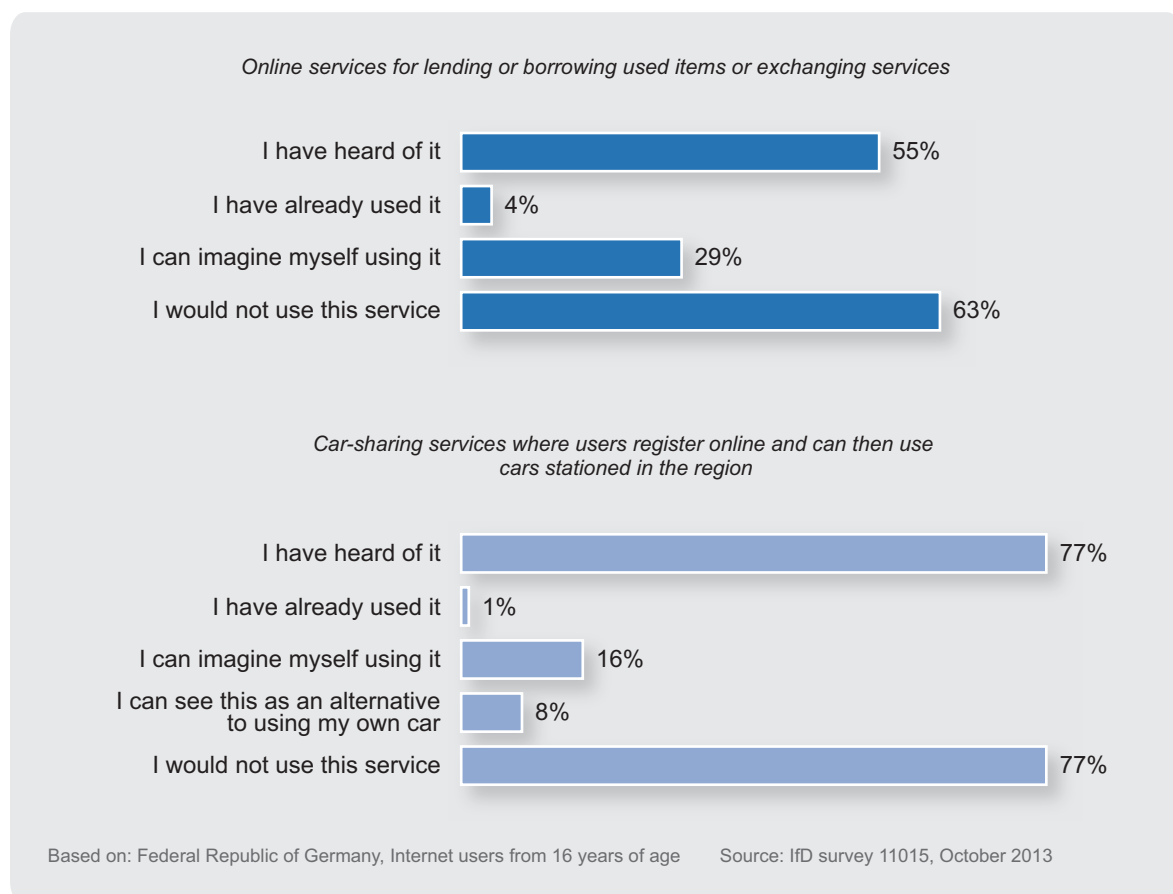


Based on: Federal Republic of Germany, Internet users from 16 years of age

Source: IfD survey 11015, October 2013

Up to now, "share economy" services have played an extremely minor role, although a large proportion of Internet users are aware of their existence; 55 % of Internet users have heard of Internet services for borrowing and lending items or for exchanging services, and 77% have heard about car-sharing services, in which users register online and can then use cars stationed in their home towns or nearby. Until now, though, only 4 % of users have acquired personal experience in lending/borrowing or exchange services, and this figure drops to just 1 % for Internet-based car-sharing services. Nevertheless, 29 % to 16 % consider these types of services to be interesting options, and in principle could envisage making use of them. Almost half of those who could see themselves using car-sharing services or who already had experience with them would consider these services an alternative to owning a car.

Potential for "share economy" services



Importance of fast Internet access

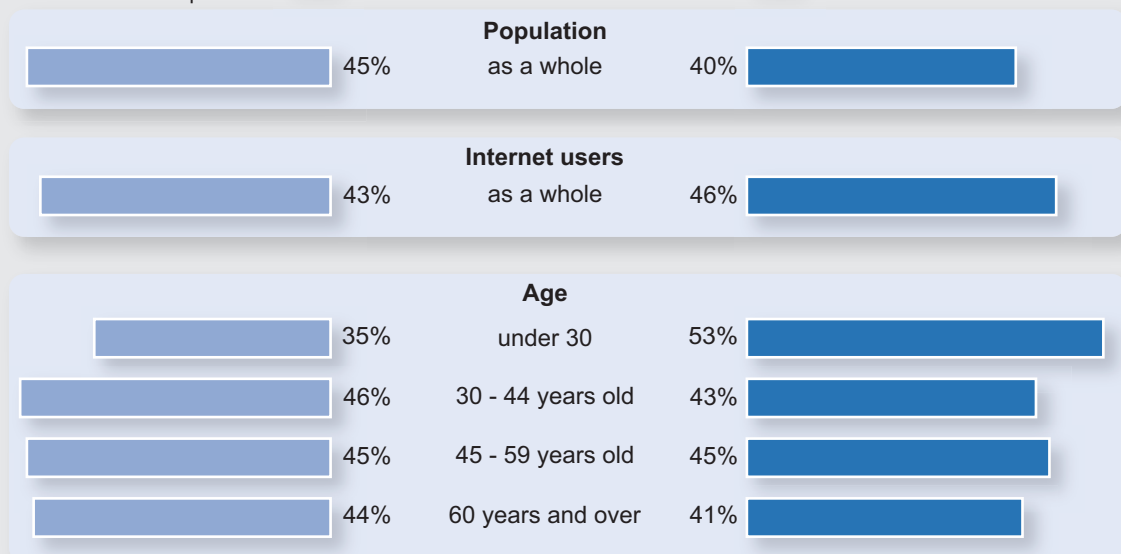
A large percentage of the population, and in particular Internet users, believe that the state has the duty to ensure nationwide accessibility to fast Internet connections in the form of broadband DSL. 40 % of the population, and 46 % of Internet users, are convinced that this is just as much a part of the basic public services required of the state as utilities and telephone connections. Those persons who use the Internet most regularly and for an above-average range of applications in particular consider it self-evident that the state must guarantee fast Internet access. 53 % of under-30s, but also 41 % of users aged 60 and over, feel that the state has the duty of providing everyone with fast Internet access.

Should fast Internet be part of the basic services the state must provide?

"In connection with the so-called basic provision, the state has the duty to provide citizens with commodities such as power and telephone connections. Do you think that the state also has the duty to ensure that the whole of Germany has access to fast Internet, i.e. broadband DSL, or should this not be part of the basic state provision?"

Not part of basic state provision

Part of basic state provision



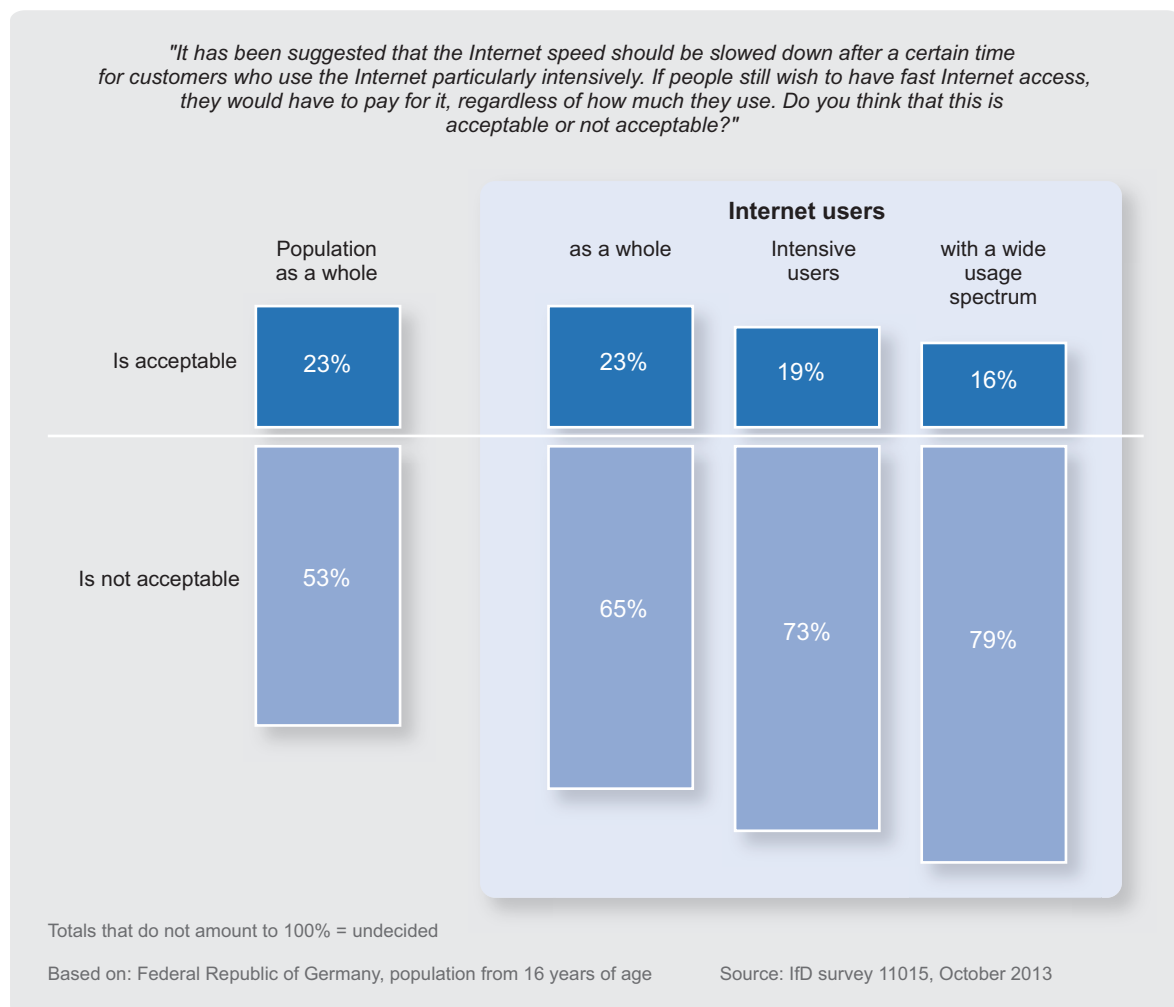
Totals that do not amount to 100% = undecided

Based on: Federal Republic of Germany, population from 16 years of age

Source: IfD survey 11015, October 2013

In light of the above, the ideas of slowing down Internet speeds for intensive users after a certain period of time or of only enabling permanently fast Internet access at high charges are viewed extremely critically. 23 % of users would find these kinds of restrictions acceptable, while 65 % are explicitly opposed to them. The attitude of those who use the Internet several times per day or who use a comparatively large number of services is even more striking. Of these people, around three quarters reject any kind of time-based restriction of Internet access speed.

Clear rejection of speed restrictions



2. Assessment of the benefits and risks of the Internet

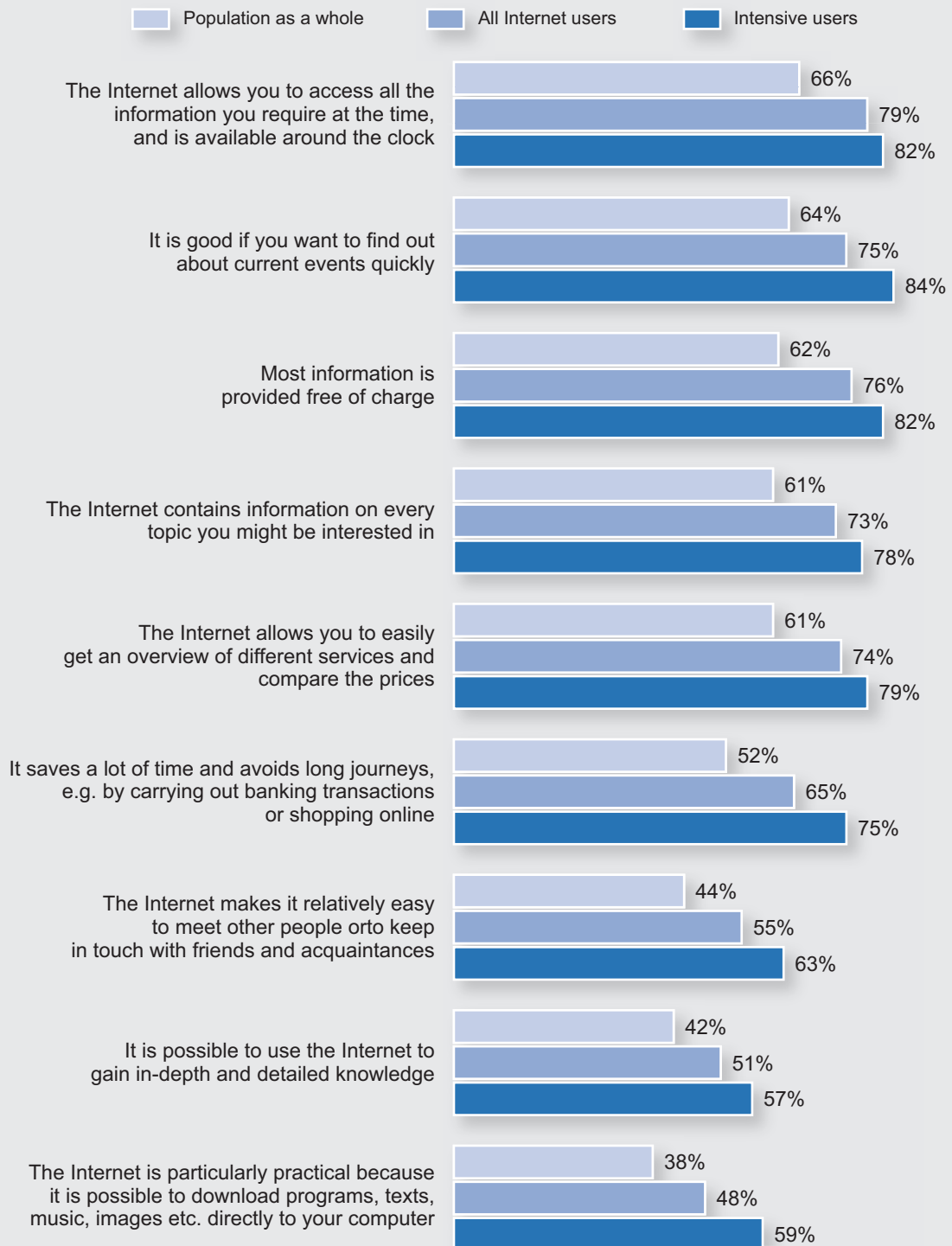
A wide variety of advantages

The population associates a range of advantages with the Internet. Over 60 % associate the Internet with convenient and easy access to any information they require at the time, the ability to use it whenever they like, the opportunity of rapid access to current events and the fact that most information is available for free. 61 % value the scope of the service, and in particular the option of acquiring an overview of products and services online and being able to compare prices at the same time. Around half of people emphasise that using the Internet for shopping or banking transactions saves them a lot of time and means that they don't have to make long journeys, and a large percentage of the population also mention the importance of the Internet for personal communication and entertainment. For 44 %, another advantage of the Internet lies in the fact that it is relatively easy to make contact with other people or to remain in touch with friends and acquaintances, and 38 % of the population refer to the option of downloading programs, music and images from the Internet. For 32 %, the additional option of using other media online such as radio, television or magazines represents another advantage of the Internet.

The urgency with which those who use the Internet several times a day emphasise the advantages of the Internet paints an even clearer picture. Around 80 % of the people in this group mention permanent access to information, the ease of access and the absence of attendant charges, and 57 % emphasise the fact that the Internet enables the acquisition of in-depth and detailed knowledge on a range of topics. 42 % are convinced that the Internet makes people aware of interesting topics and issues on a more regular basis. The intensive Internet users are significantly more sceptical when assessing freedom-related aspects of the Internet. The fact that there are very few regulations on the Internet and that users therefore have comparatively high levels of freedom is considered an advantage by 18 %. The responses to the question on the advantages of the Internet also confirm the more reserved interest in "share economy" services. Even among the intensive users, only 17 % see the option of lending or borrowing items they require infrequently as an advantage of the Internet.

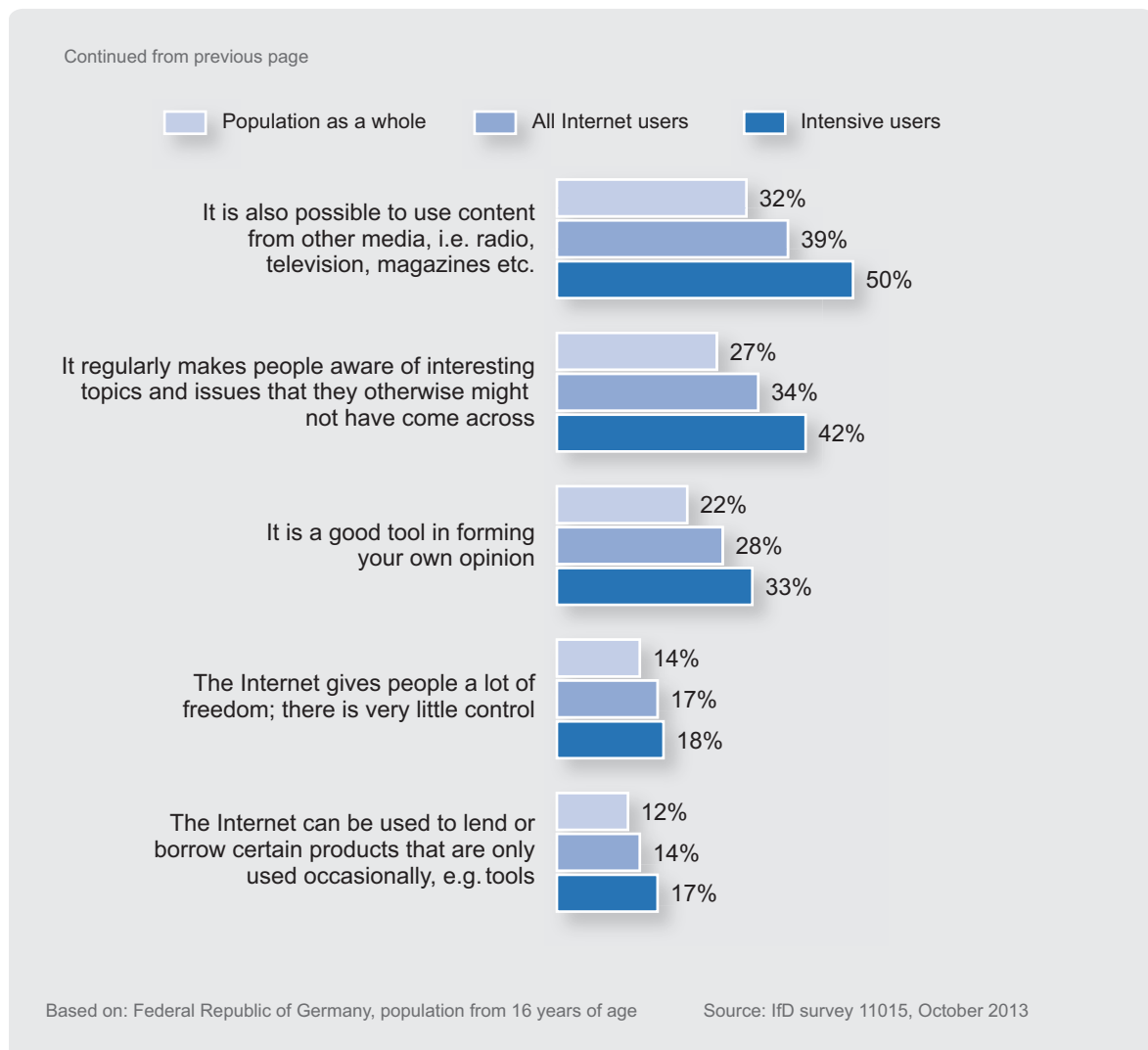
Advantages of the Internet

"In my opinion, these are the advantages of the Internet"...



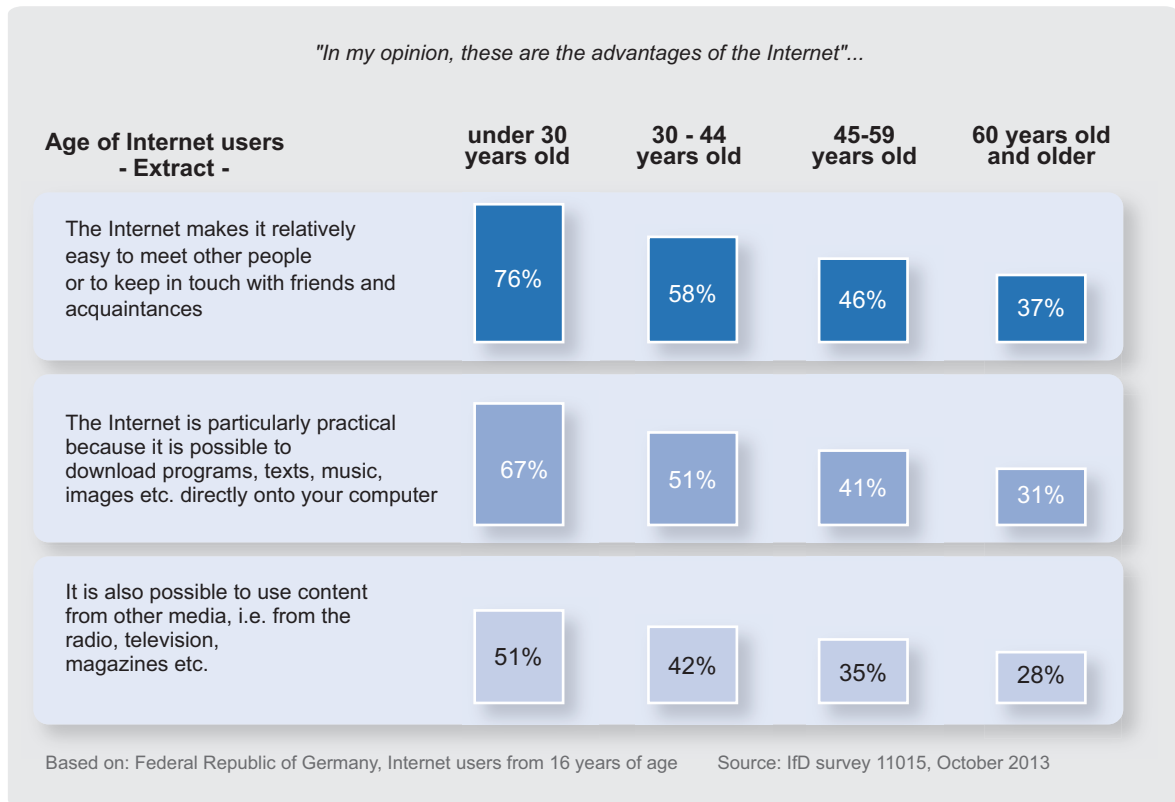
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Advantages of the Internet



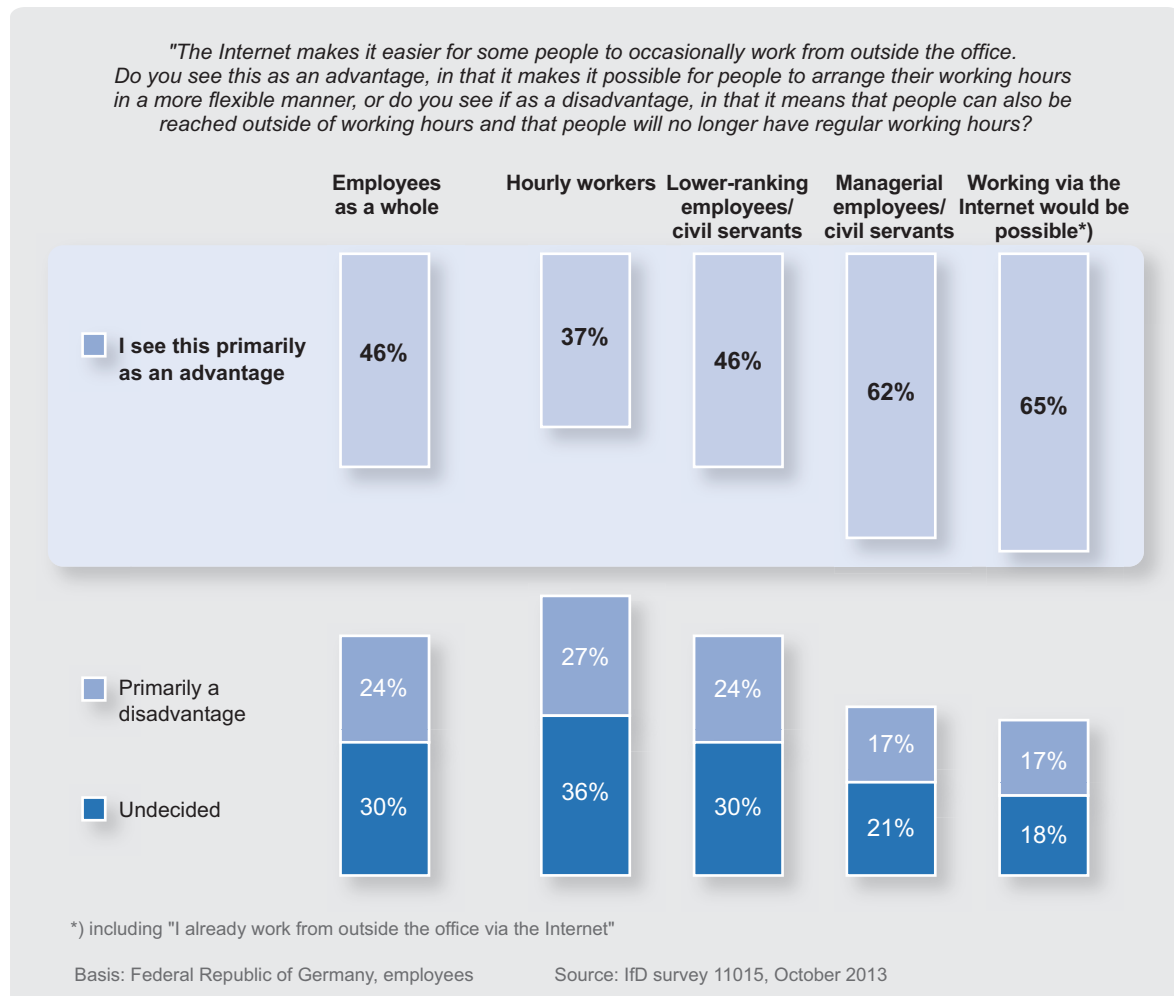
Given their specific spectrum of use, younger Internet users place significantly above-average emphasis on the whole range of possibilities offered by the Internet in terms of communication and entertainment. 74 % of under-30s, but a mere 37 % of users aged 60 and over, mention the high level of importance in establishing and maintaining contact with others. Two thirds of under-30s, but just under a third of older users, believe that the option to download content such as music and images onto their own computers is a key advantage. Likewise, the option of using different media at the same time is also of greater importance to the younger user group than the older user group.

In places highly age-related assessment of Internet advantages



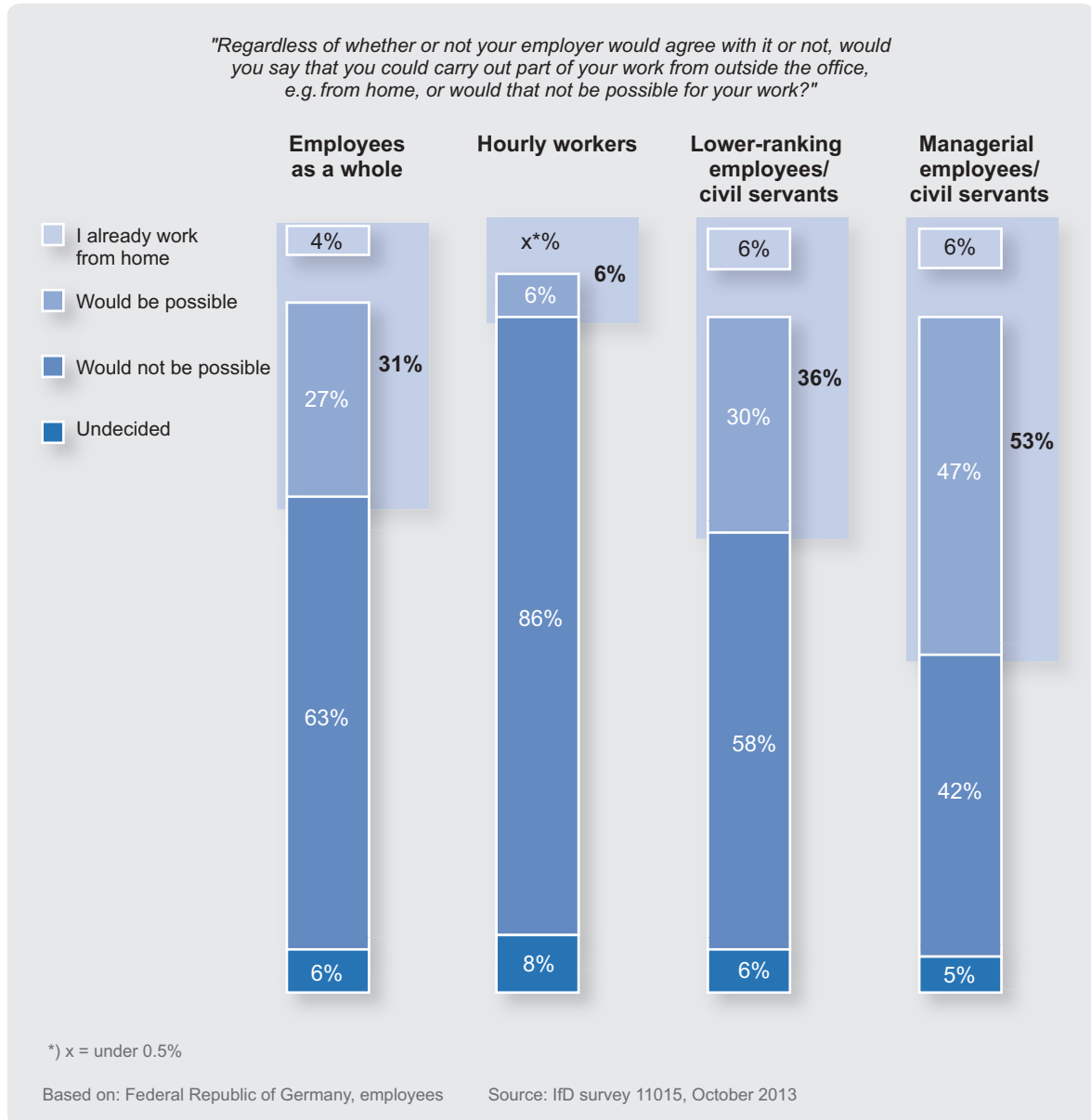
From the perspective of many employees in particular, another advantage of the Internet lies in the fact that it gives users the option of occasionally working away from the actual workplace, e.g. from home. 46 % of employees view this as an advantage, along with the associated option of arranging and organising their working hours in a more flexible manner. However, 24 % are convinced that this opportunity also comes with disadvantages, as employees can be reached at any time, and there is the risk that employees will no longer have regular working hours. This factor is viewed as particularly advantageous by employees in managerial positions; 62 % of employees and civil servants in managerial positions have a positive appreciation of this option, while only 17 % express scepticism.

Many people view the option of increased flexibility in the organisation of working hours as an advantage



Of the employees and civil servants in managerial positions, a large percentage believe that this option would provide them with the opportunity to complete some of their work outside the office; 6 % of this occupational group already use the Internet to work from outside the office. Around half of this group believe in the feasibility of this option, irrespective of their employer's approval. Lower-ranking employees and civil servants, and in particular workers on hourly wages, are a lot more reserved in their assessment: only 6 % of this last group believe that it would be possible to carry out work-related tasks from outside the workplace.

Employees in managerial positions in particular could complete some of their work from outside the office

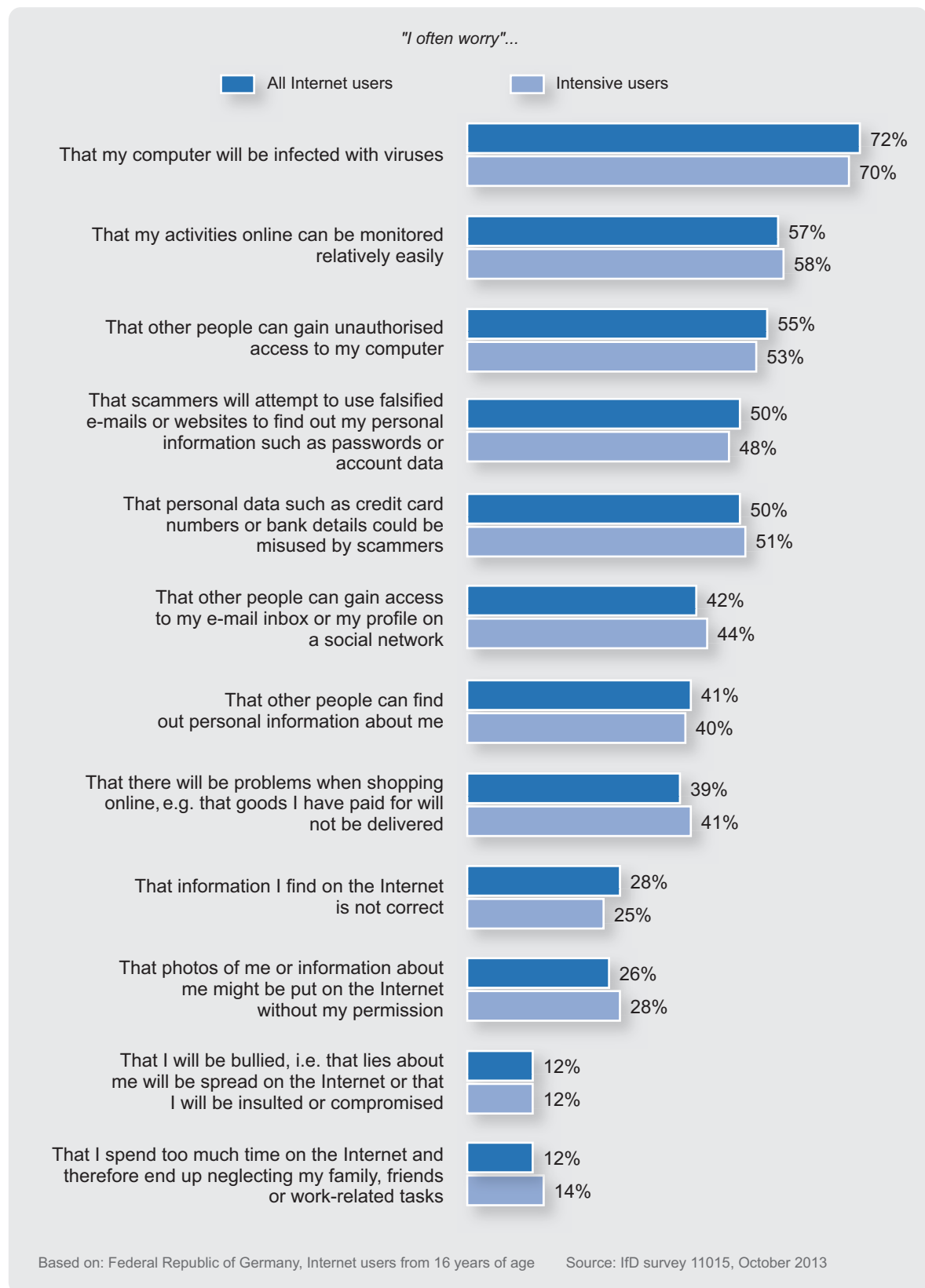


Personal experience contributes only partially to the concerns about risks

For all advantages offered by the Internet, a consideration of the concerns that users express reveals they also associate the Internet with numerous risks. This is particularly true with regard to the risk of personal computers becoming infected with viruses when surfing the net. This is something that 72 % of users frequently worry about, and 57 % are afraid that their online activities can be monitored relatively easily. A similarly large number of users worry that other people could gain unauthorised access to their computer, and one in two people are concerned that scammers could use falsified emails or Internet pages to try and access personal information such as passwords or account data or to misuse credit card numbers or bank details for their own purposes. Around 40% are worried that people could gain access to their email inboxes, their social network profiles or other personal data while they are on the Internet. Conversely, doubts relating to the credibility of information received via the Internet are relatively low, with 28 % of users worrying that this information might not be correct. 12 % are concerned that they could be bullied online or that they could spend too much time online and therefore end up neglecting family, friends or work-related tasks.

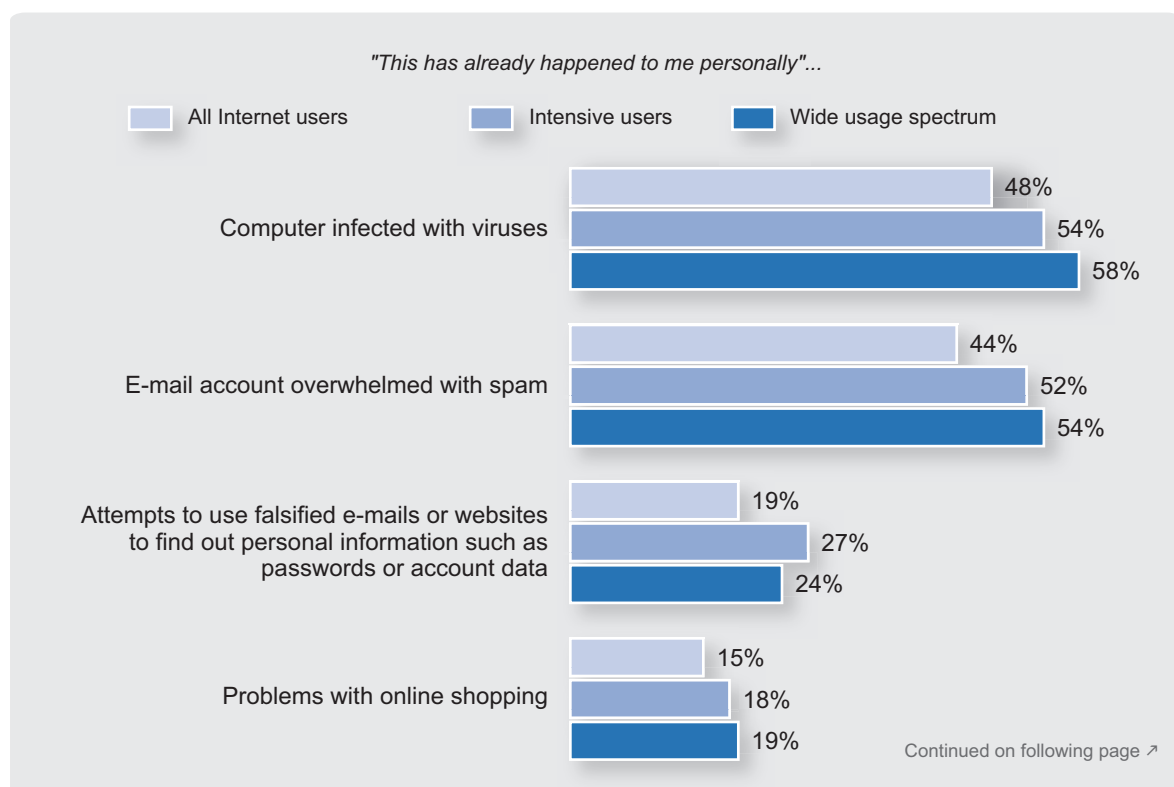
In most areas, there are only marginal differences between the concerns expressed by the individual user groups. People who use the Internet several times per day and for a comparatively wide range of applications are generally less worried (or not more worried) than those who use the Internet comparatively less frequently, and there is also very little difference between younger and older users. Merely the concerns of being bullied, insulted online or of spending too much time online are significantly age-related, and are mentioned with far greater frequency by the under-30s than by the older age groups.

Concerns about risks on the Internet



The most common negative experiences with the Internet involve problems with viruses and the nuisance of spam e-mails, with 48 % of users reporting that their computers have already been infected with viruses and 44 % complaining that their e-mail accounts have been overwhelmed with spam. There are comparatively few reports of other negative experiences. Although 19 % of Internet users have personal experience of third parties using falsified e-mails or websites to try to gain access to information such as passwords or account data, only one in two people is concerned that this might happen to them. There is an even larger discrepancy in relation to actual fraud or unauthorised access to users' personal computers, e-mail accounts or social network profiles. Up to now, 3 % of users interviewed have been the victim of misuse of credit card numbers or bank details, 4 % have experienced third parties accessing their inboxes or profiles, and 6 % report that third parties have gained access to their personal computers. However, the fact that these types of misuse might occur remains one of the most commonly expressed concerns. People who use the Internet particularly intensively, i.e. several times per day, report more frequently of negative experiences. In frequent cases the link between many of the concerns about individual specific risks associated with Internet use and actual personal, negative experience is limited. However, it is important to consider when evaluating the results that viewed in absolute terms, even small percentages constitute a large number of people with the corresponding experience.

Negative experiences with the Internet



Negative experiences with the Internet

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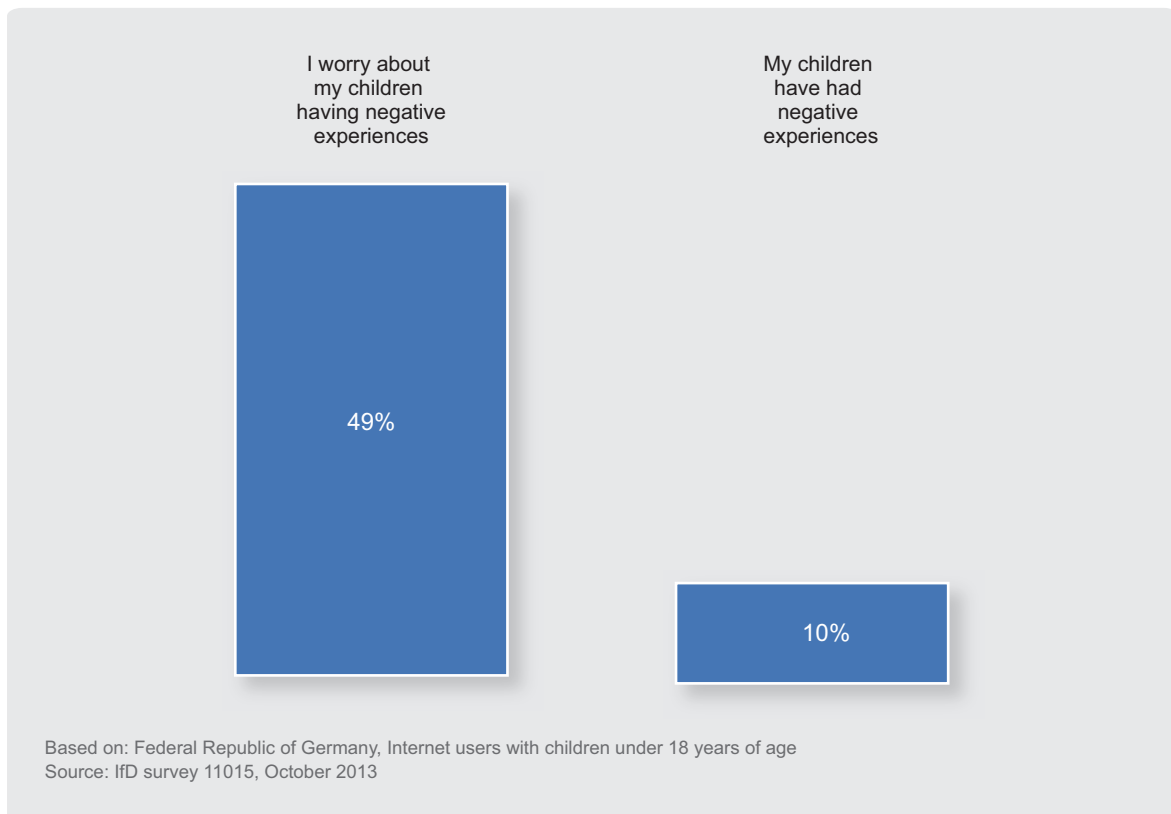


Based on: Federal Republic of Germany, Internet users from 16 years of age

Source: IfD survey 11015, October 2013

Equally, the concerns among many parents that their children could be faced with negative experiences on the Internet are quite rarely attributable to actual negative events; 49 % of parents with children under 18 share this concern, but only 10 % report that their children have indeed suffered this form of negative online experience to date.

Risks for parents' own children

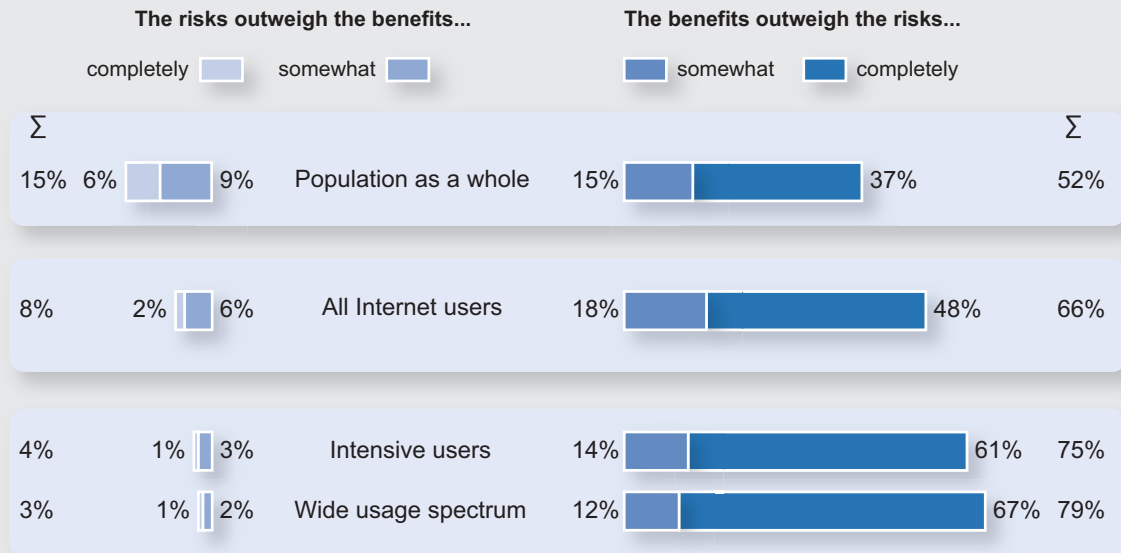


The benefits outweigh the risks

Even though there are a range of concerns associated with the use of the Internet and negative experiences may indeed occur, both Internet users and the population as a whole continue to view the Internet in a positive light. The majority of users are convinced that the benefits offered by the Internet clearly outweigh the risks. 52 % of the population point primarily to the advantages of the Internet, whereas 15 % predominantly see risks. This pattern acquires even greater clarity among Internet users: 66 % primarily emphasise the advantages, and around half state that they significantly outweigh any disadvantages. Only 8 % believe that the Internet comes with a greater proportion of risks. People who use the Internet several times per day or have a wide spectrum of use are even more convinced of the advantages of the Internet.

The advantages far outweigh the risks

"When you think of the Internet, which of the following outweighs the other: the benefits that the Internet provides, or the risks associated with the Internet?"



Totals that do not amount to 100% = undecided

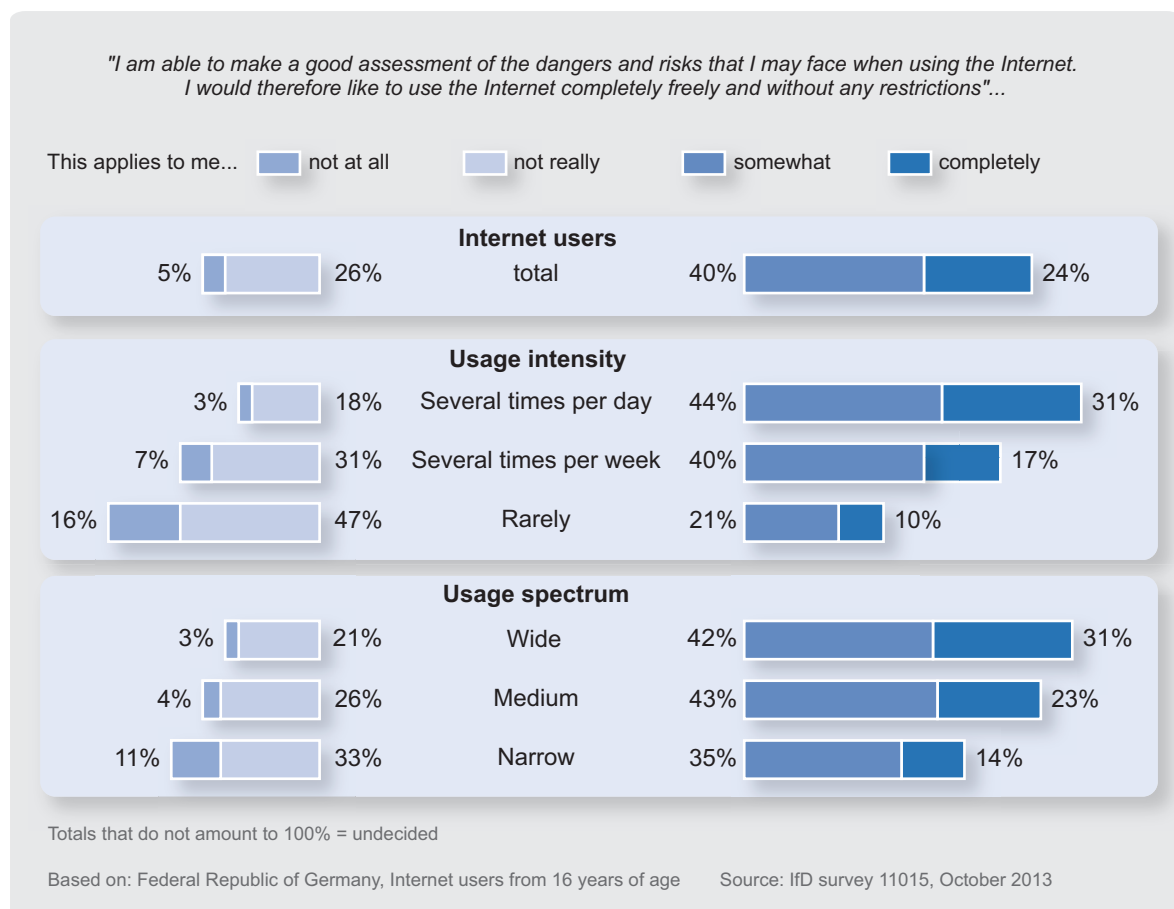
Based on: Federal Republic of Germany, population from 16 years of age

Source: IfD survey 11015, October 2013

3. Safety when using the Internet

Almost two thirds of Internet users are confident that to a limited extent at least, they are able to assess the dangers and risks associated with the Internet. However, the circle of people who feel completely confident in this respect and therefore wish to use the Internet with total freedom and without any restrictions is just 24 %. A further 40 % are convinced that they are able to assess the possible risks at least to a certain extent. Almost a third feel somewhat or completely sceptical about their ability to do so. The extent to which someone feels able to assess the dangers and risks associated with the Internet essentially depends on the scope of their personal experience. Of those who use the Internet several times per day and use an above-average number of services, around three quarters feel predominantly or completely confident here, while almost a quarter express scepticism. These doubts prevail among Internet users with a comparatively narrow spectrum of use, and particularly among those who use the Internet rarely. 61 % of people who use the Internet no more than once a week feel completely unable, or somewhat unable, to assess the dangers and risks associated with the Internet.

The majority of people are confident that they can assess the dangers and risks associated with the Internet

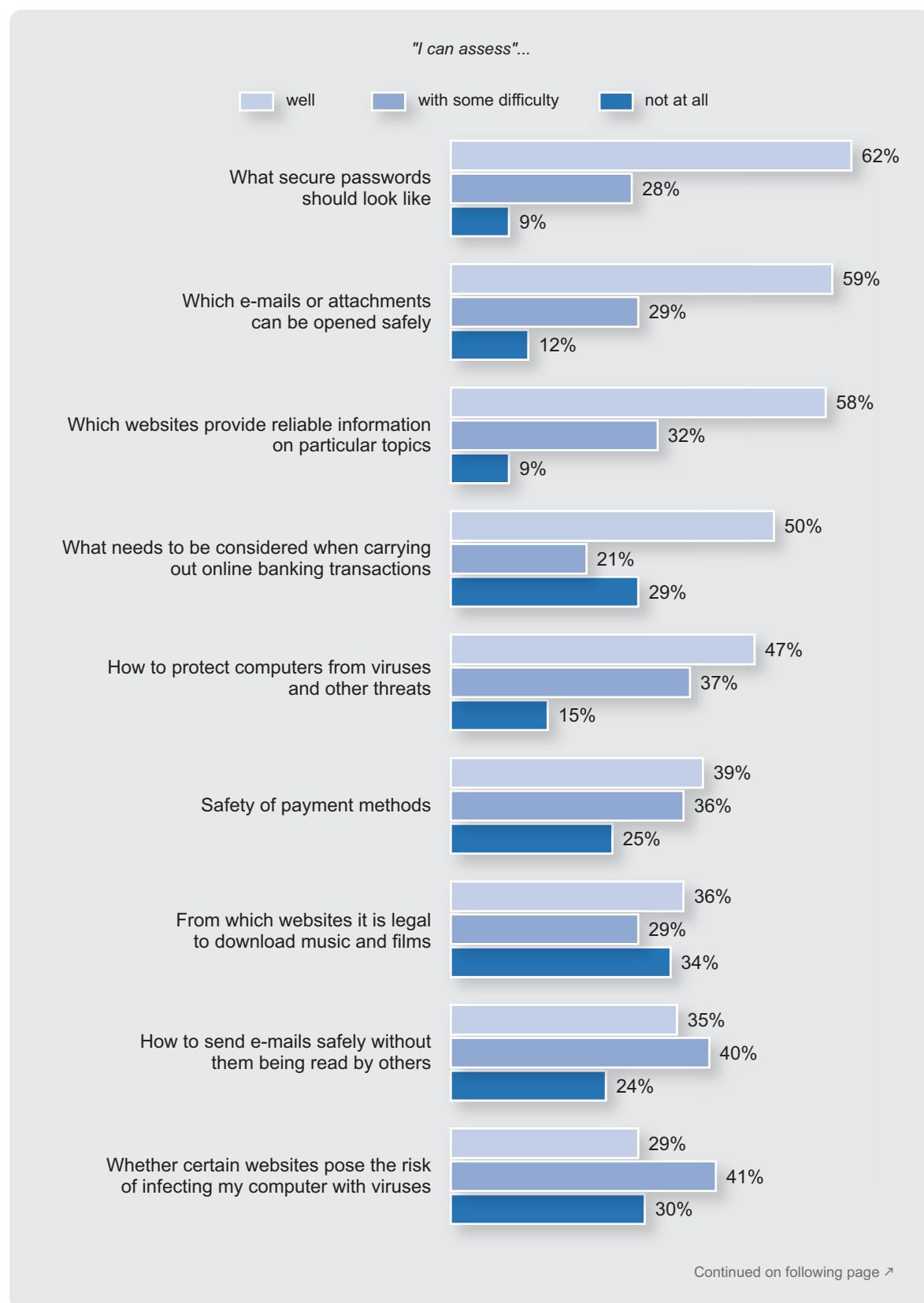


Even though the majority of people feel largely confident that they can assess the dangers and risks, the answers to this question underline that in actual fact, there is considerable uncertainty in many areas.

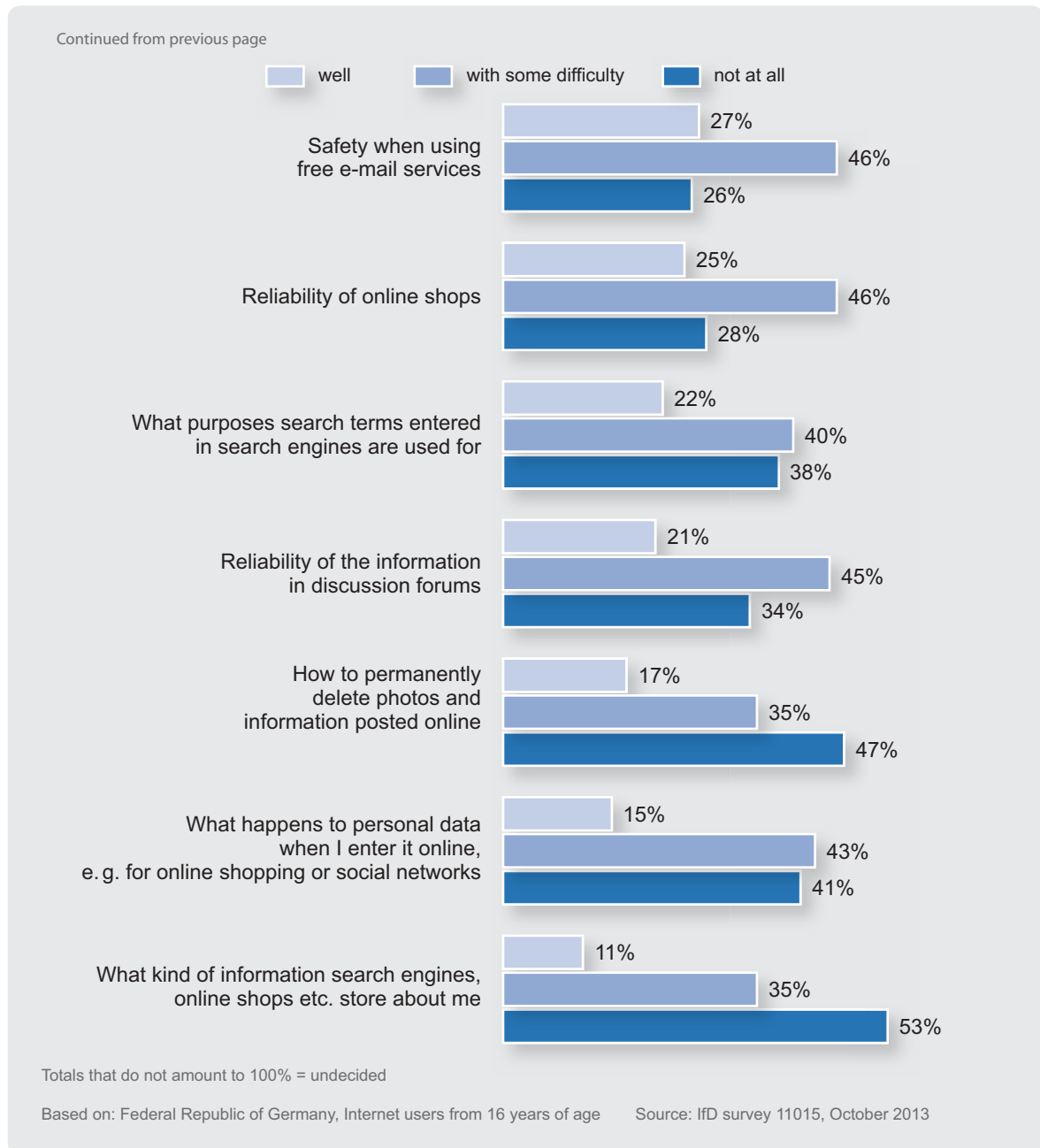
62 % of users are confident that they can choose secure passwords, and 59 % are convinced that they can judge which e-mails or attachments are safe and can be opened without concern. Users are also reasonably confident that they can make a good assessment of the reliability of information on individual websites and what to bear in mind when using online banking facilities. Around 50 % of people are also convinced that they can make a good basic assessment of how to protect their computers from viruses or other threats, although in light of the negative experience in this area, scepticism does slightly outweigh confidence here. Doubt is expressed with even greater frequency in relation to the risk of becoming infected with viruses when accessing certain websites. 29 % of users are confident that they can reliably assess the risks when accessing certain sites, 41 % believe that they have difficulties assessing these risks, and 30 % believe that they cannot assess this risk at all. A similar number are confident that they can assess how safe it is to use free e-mail services or how to send e-mails safely without the risk that they will be read by others.

The greatest difference relates to saving and using personal data and other documents. 78 % have difficulties assessing, or are unable to assess the purposes for which the search terms they enter for online research can be used. Over 80 % can only make a limited assessment, or cannot make an assessment at all, of what happens to their personal data in social networks, online shops or search engines and which parts of this information are saved. Only a very small minority are convinced that they can make a sound assessment in this respect.

Considerable uncertainty in many areas



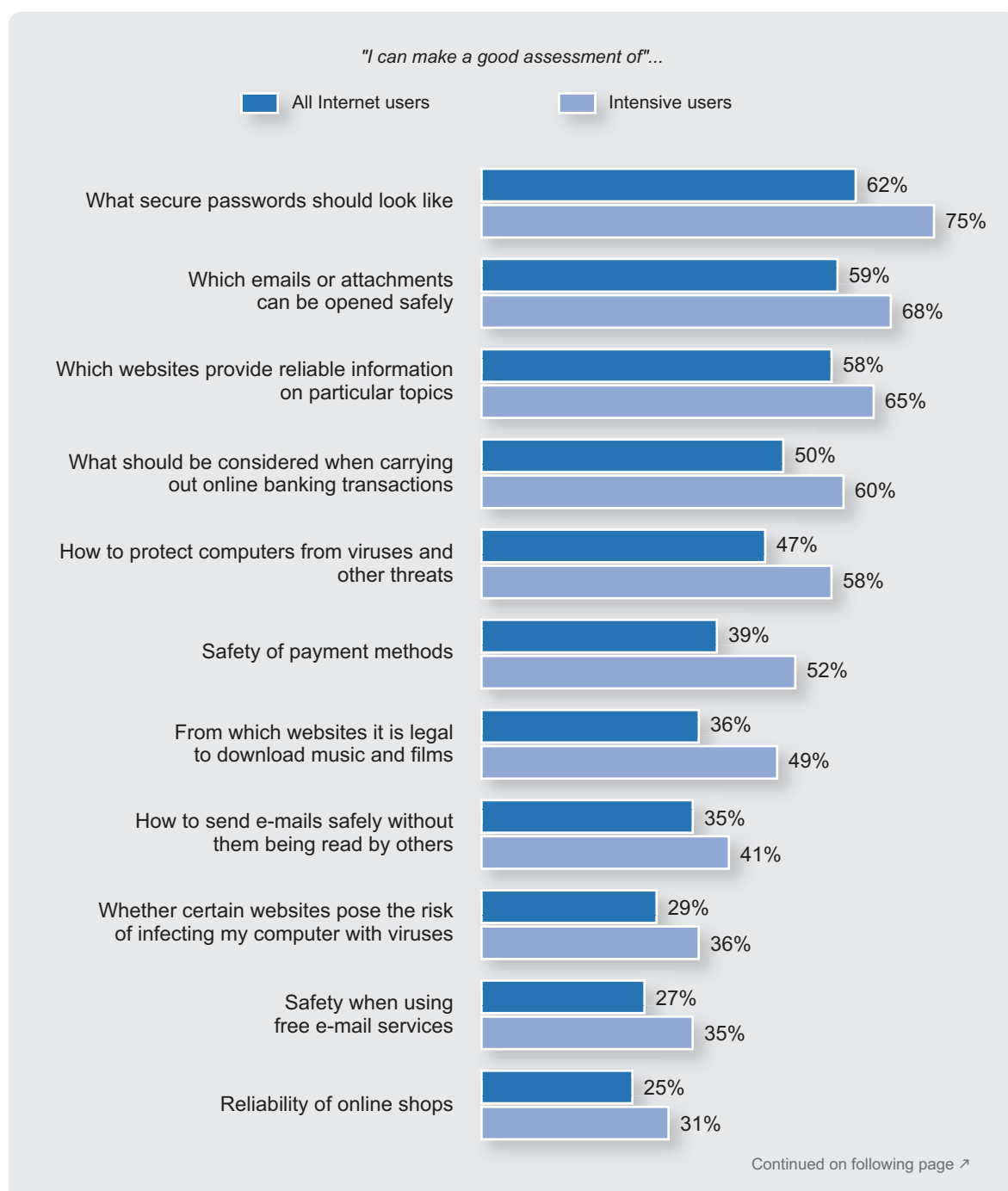
Considerable uncertainty in many areas



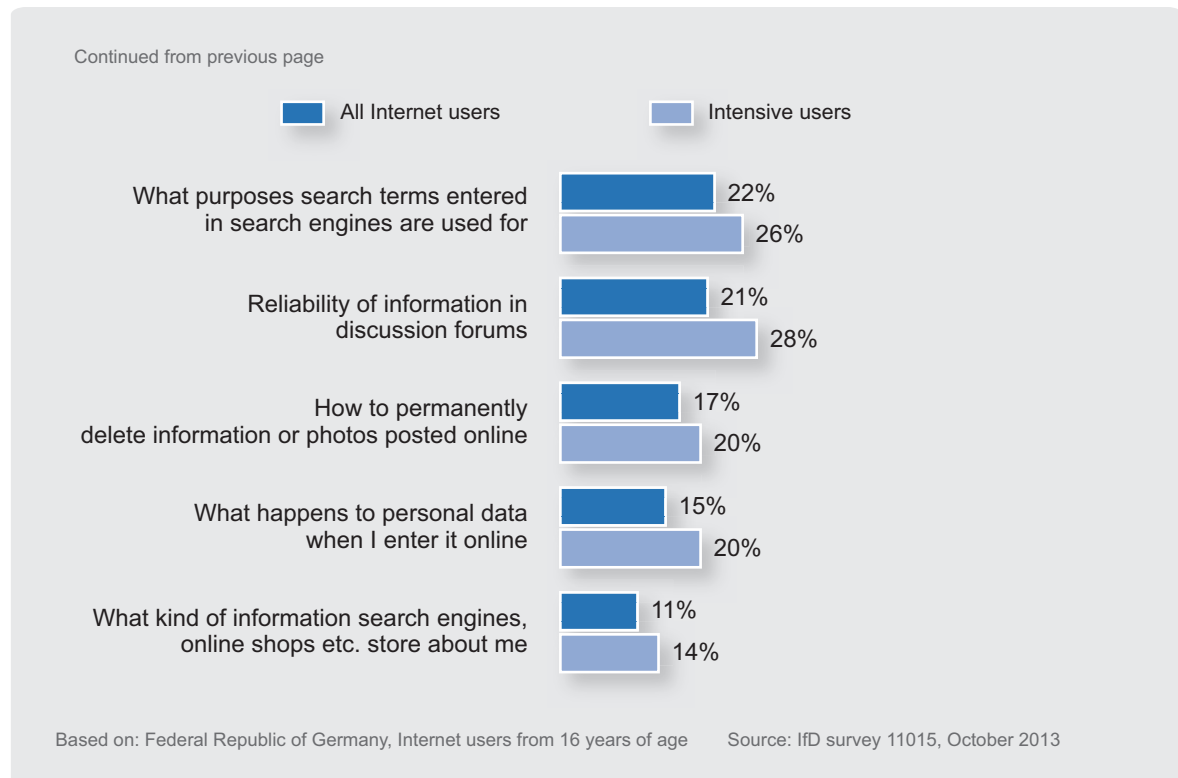
Particularly frequent Internet users with above-average confidence in their ability to assess the dangers and risks associated with the Internet quite reliably are also confident of making a better assessment in several other areas. The number of people who claim to know how to create secure passwords is 75 %, and the number of people who know which e-mails and attachments can be opened without concern is 68 %. The majority of people in this group also have faith in their basic ability to protect their computers from viruses or other threats associated with the Internet, but even among the intensive users, only 36 % are convinced that they can make a good assessment of the risks of being infected with viruses on certain websites. 35 % believe that they can make a reliable assess-

ment of the safety of free e-mail services. People who use the Internet with particular regularity rate their knowledge concerning the storage and use of personal data and information only marginally better than the average among all users.

Intensive users are only marginally better at assessing the individual risks associated with the Internet



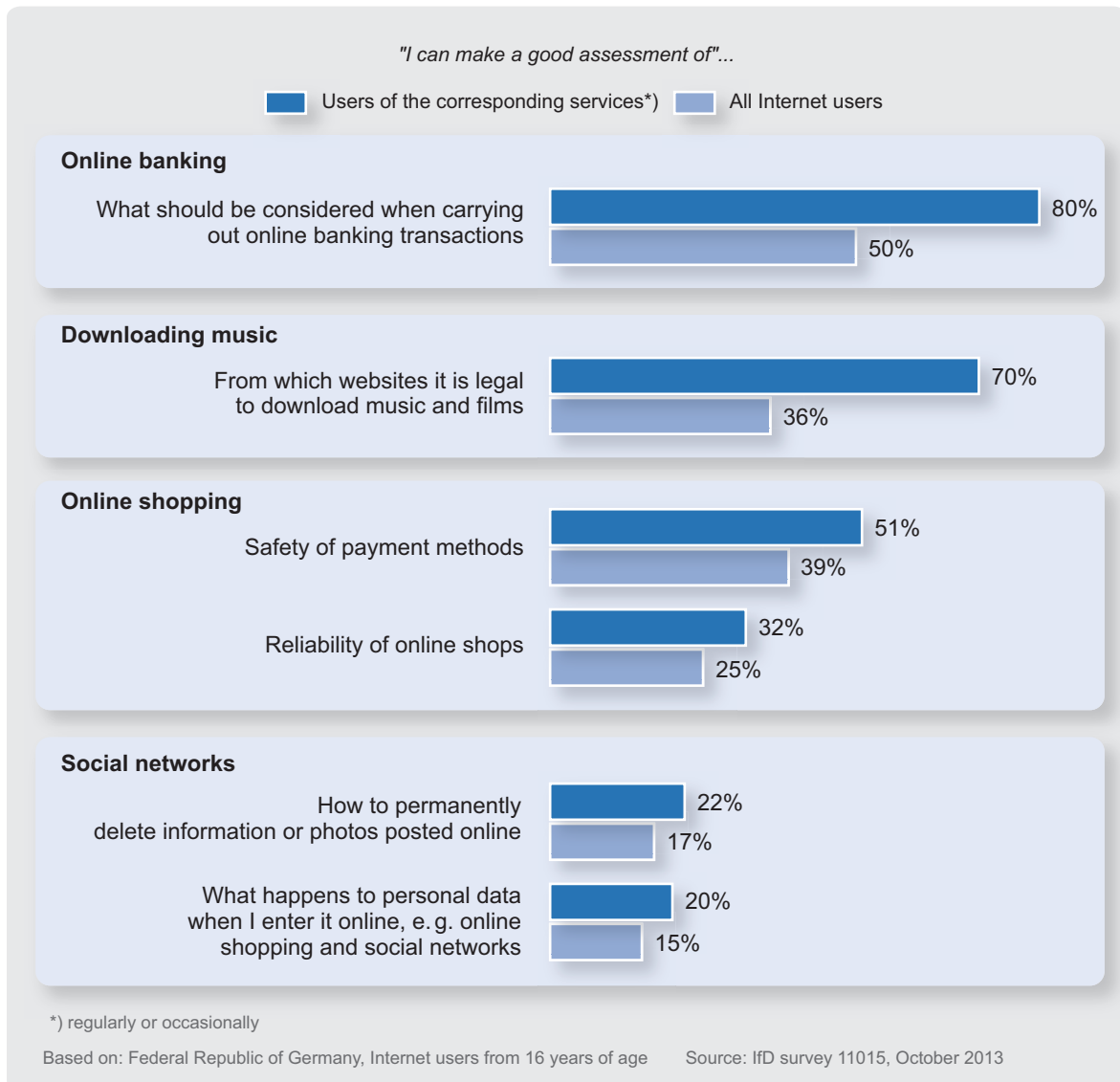
Intensive users are only marginally better at assessing the individual risks associated with the Internet



In some areas also, just how confident Internet users feel in assessing different aspects of Internet use is dependent on the extent to which they use the associated services and how familiar they are with them. A significant correlation can be seen here in the case of online banking, for example. 80 % of people who carry out their banking transactions online are at least occasionally sure that they know what needs to be considered while doing so, compared with 50 % of Internet users as a whole. Of those who regularly or occasionally download music or films, 70 % believe that they have a good idea of which websites can be used to do so, compared with only 36 % of all Internet users.

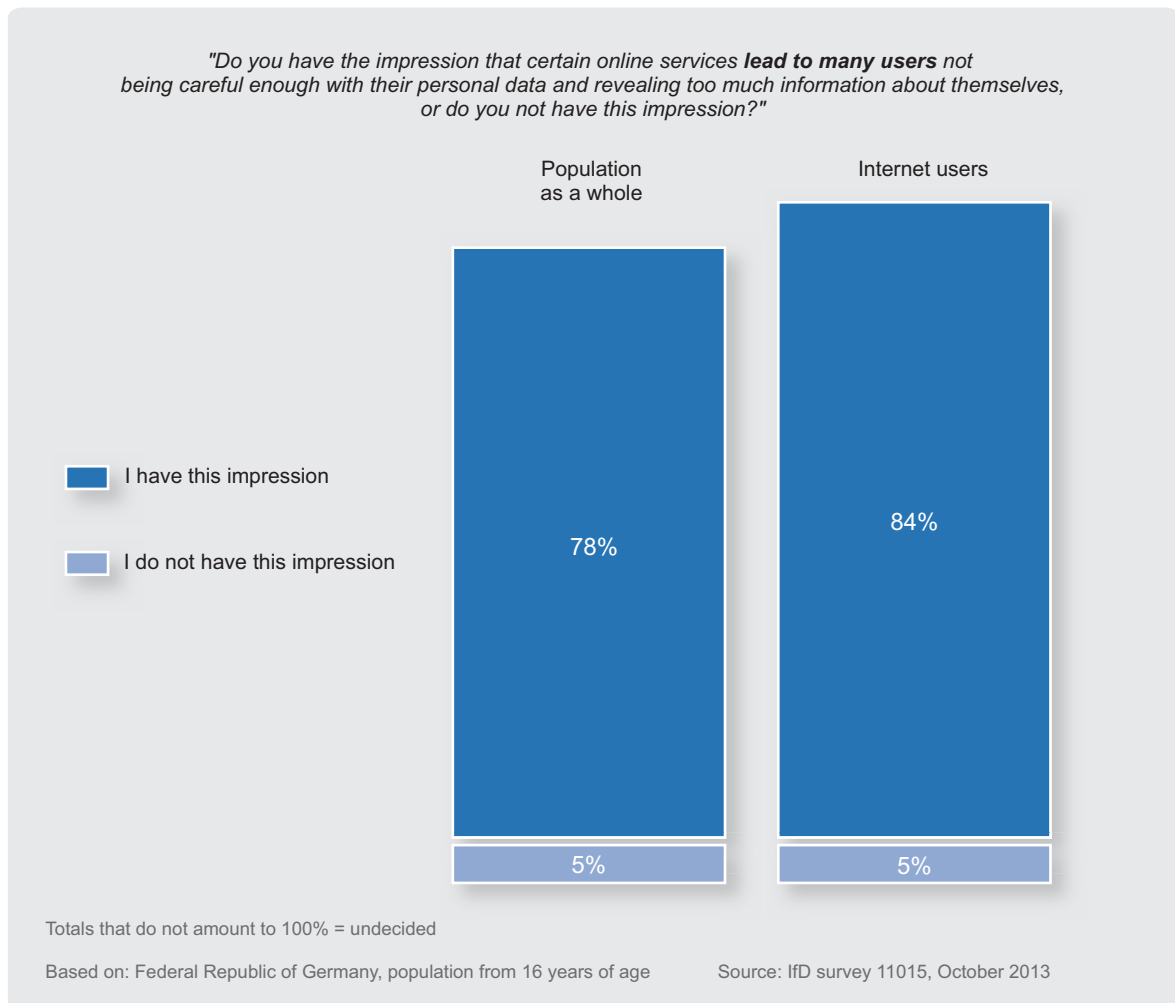
This correlation is significantly lower in the assessment of risks associated with online shopping. Almost half of those who shop online are at least occasionally confident that they can assess the safety of particular online payment methods, although not even one in three of these people can make a sound assessment of the reliability of Internet shops. This is not significantly better than the assessment provided by all Internet users in this respect. Looking at the example of users of social networks clearly shows that users' ability to make an assessment in a particular area can be low, even if they are familiar with using the associated services. The percentage among this group who have a good understanding of how to permanently delete information or photos posted online is only marginally larger than for Internet users as a whole. The knowledge among users of social networks concerning the purposes for which, and how, their personal data may be used in these kinds of networks is only marginally better than the average for all users.

Assessment by the users of the individual risks inherent to corresponding services



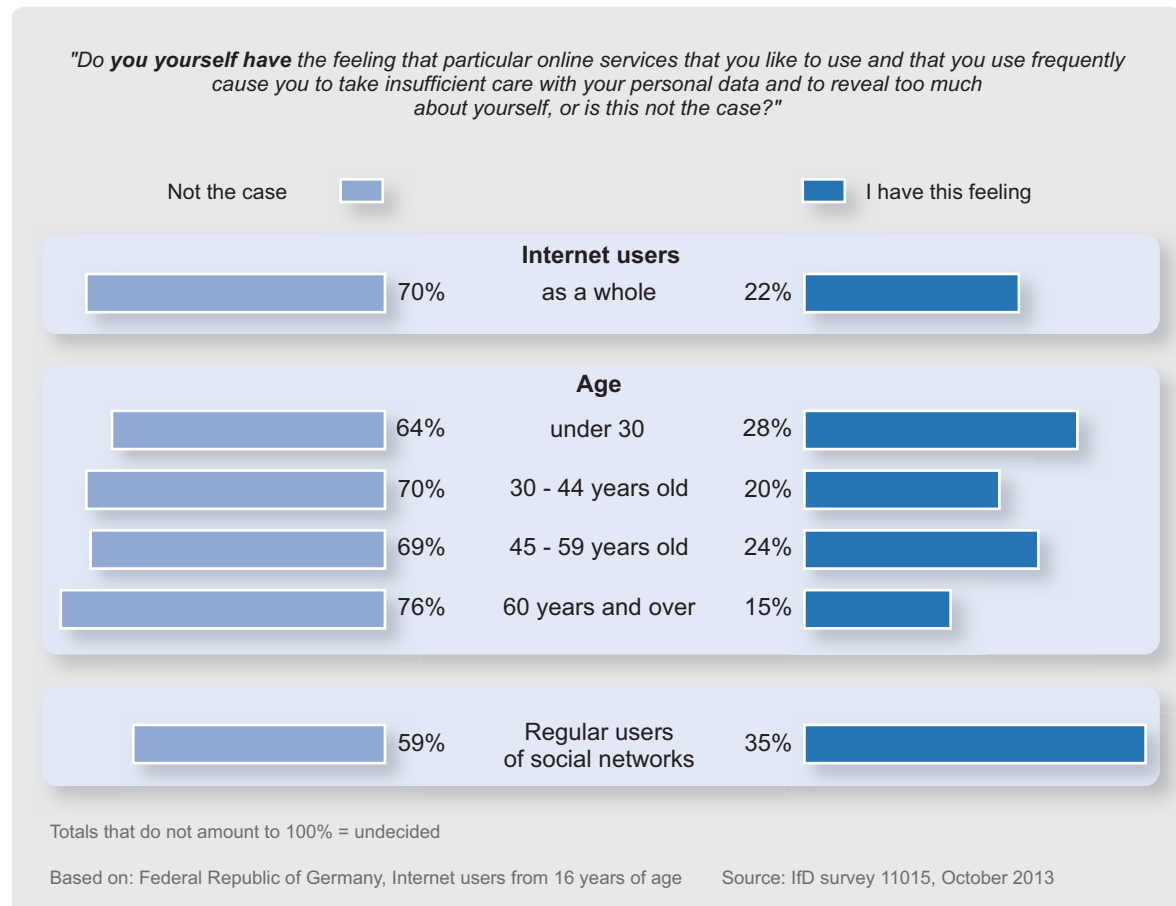
For the vast majority, it is clear that many users are not sufficiently attentive in considering the manner in which their personal data are used. 78 % of the population and 84% of Internet users have the impression that certain online services prompt many users to exercise insufficient care with their personal data and to reveal too much information about themselves. Only a very small majority of 5 % do not believe that this risk exists.

Many Internet users point to a lack of care when handling personal data



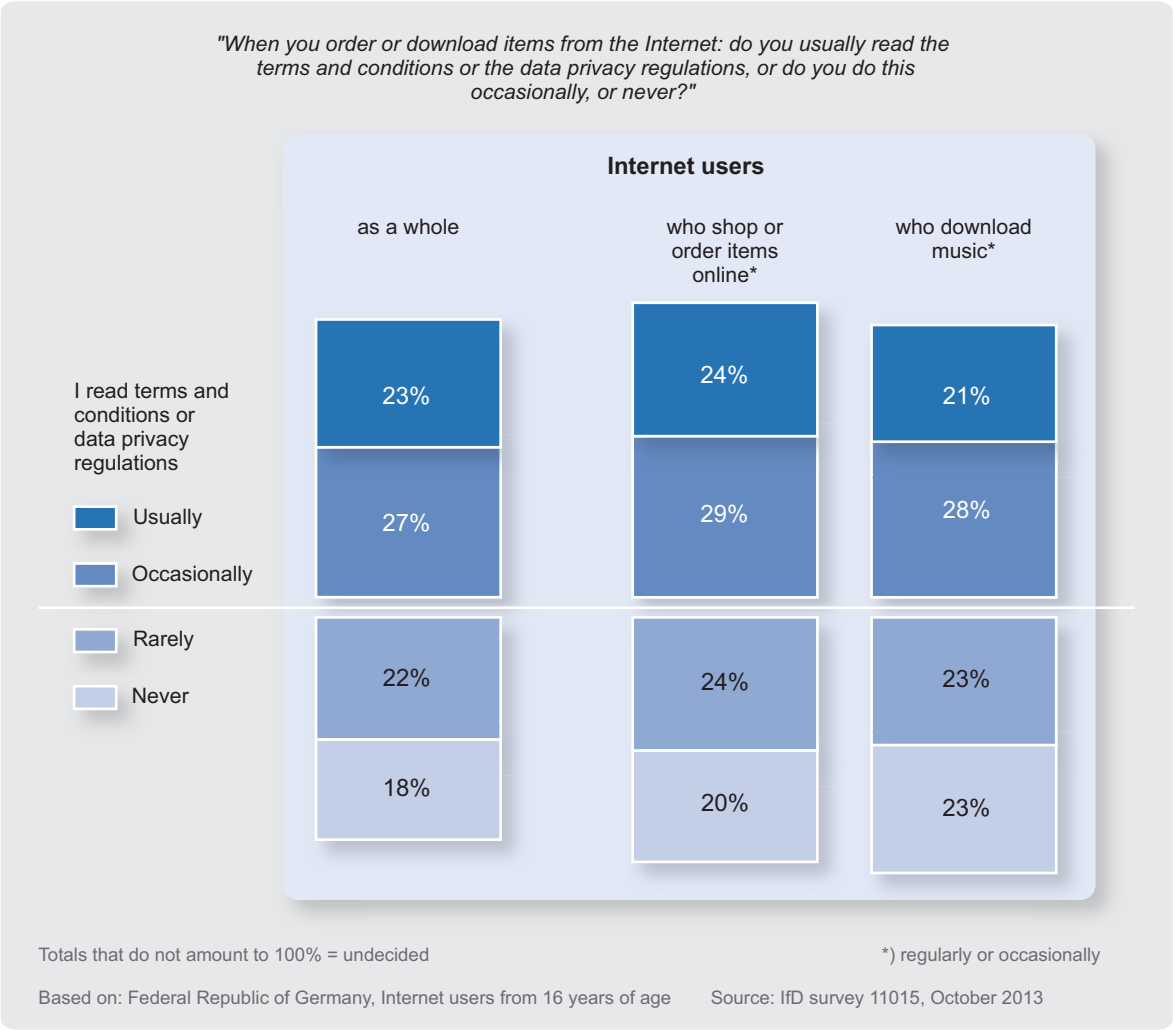
Users' assessment of their own behaviour contrasts with this completely; when referring to themselves, just 22 % have the impression that the particular services that they like to use and use regularly prompt them to exercise insufficient care in handling of their personal data. 70 % are convinced that this does not apply to themselves. Even those who use the Internet more frequently and with a wider-than-average spectrum of use, here primarily the younger generations, are not worried that they could possibly reveal too much information about themselves online. By and large, those who use social networks regularly also do not see any problems in this respect. Of this group, just 35 % are concerned that the care they exercise in handling their personal data may be inadequate, and 59 % explicitly do not believe that this risk exists.

Few people have the impression that they exercise insufficient care in the handling of their personal data



Only a small minority seek information concerning the particular terms and conditions or data privacy regulations when they order or download items online. This is the case for 23 %, while 27 % pay attention at least occasionally. 44 % of online shoppers and 46 % among those who at least occasionally download music from the Internet read this kind of information only rarely or not at all.

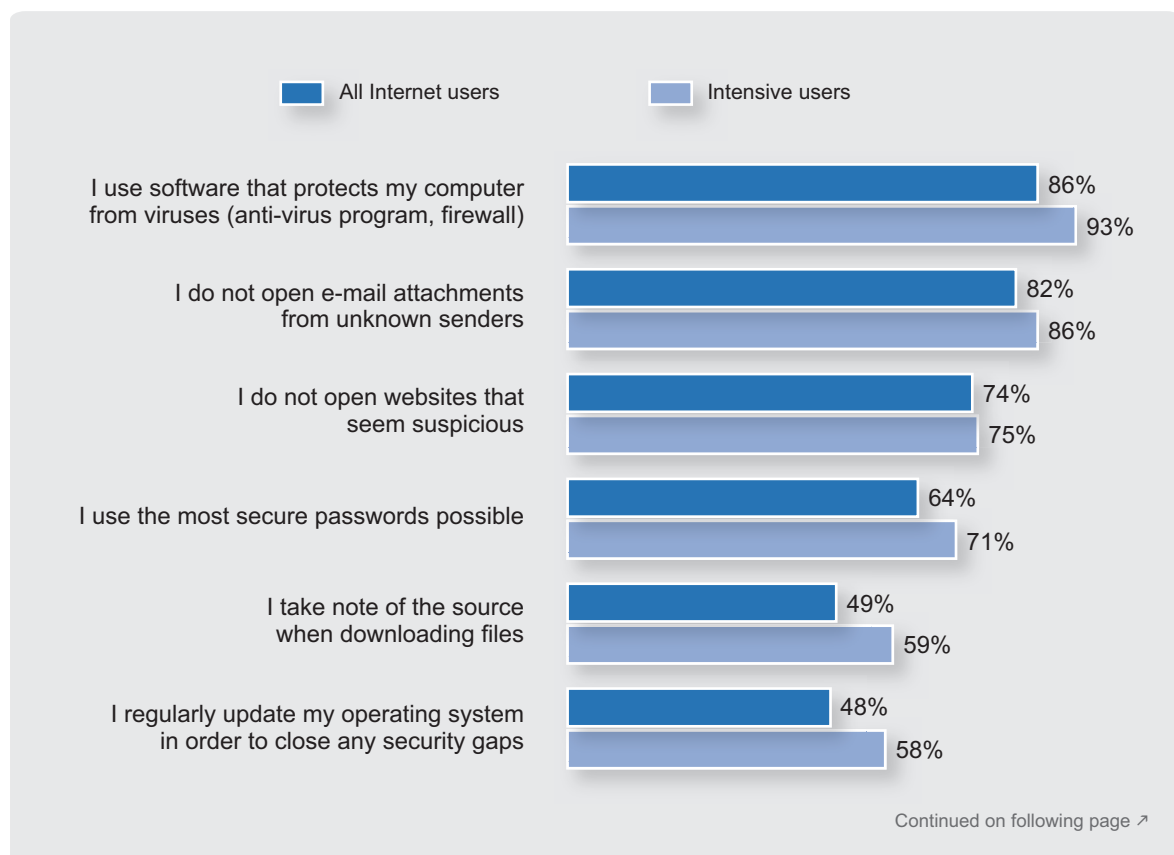
Information on terms and conditions and data privacy regulations



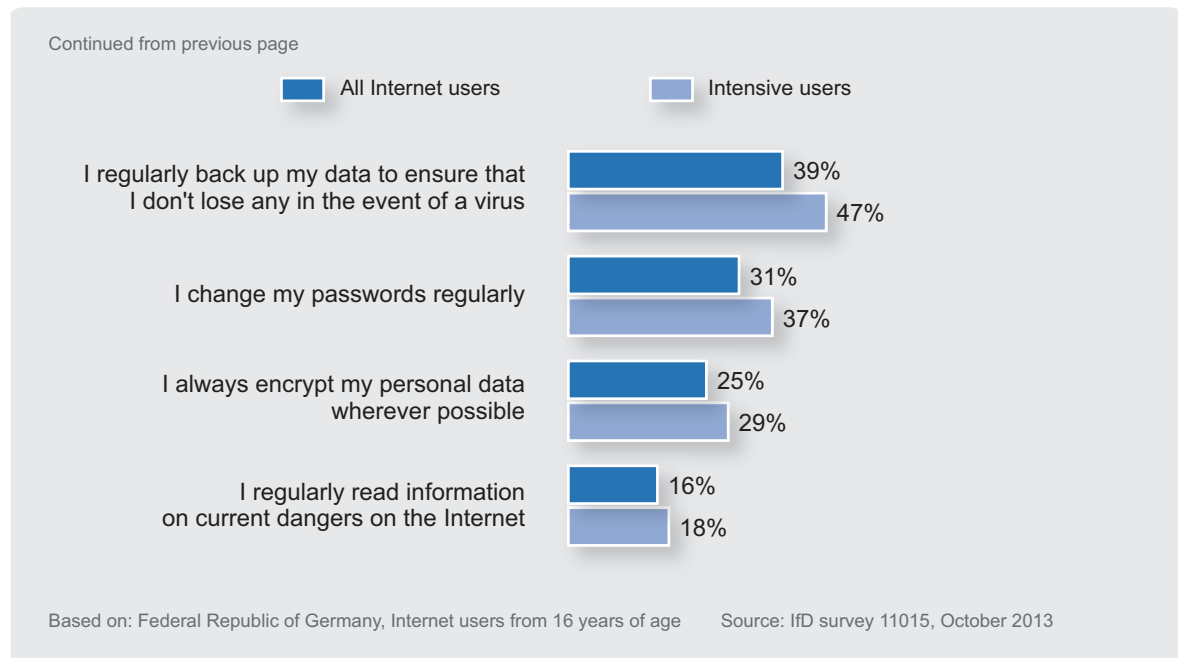
4. Personal safety precautions when using the Internet

Internet users try to protect themselves from the dangers and risks associated with the Internet in a variety of different ways. In light of widespread concerns by users that their own computers could become infected with viruses, the vast majority use anti-virus programs and quite naturally adopt a cautious approach to e-mails and suspicious websites. 86 % of all users and 93 % of those who use the Internet several times per day state that they have installed a special anti-virus program on their computer. 82 % do not open any e-mail attachments from unknown senders, and around three quarters do not open websites that seem suspicious. However, while 64 % try to make their passwords as secure as possible, only 31 % change their passwords on a regular basis. Around one in two people report that they pay attention to the source when downloading files or regularly update their computer's operating system with a view to patching any security gaps. This figure is almost 60 % among intensive users. However, few people encrypt their personal data where possible, and even fewer people keep themselves continually informed about current dangers on the Internet.

Safety precautions when using the Internet



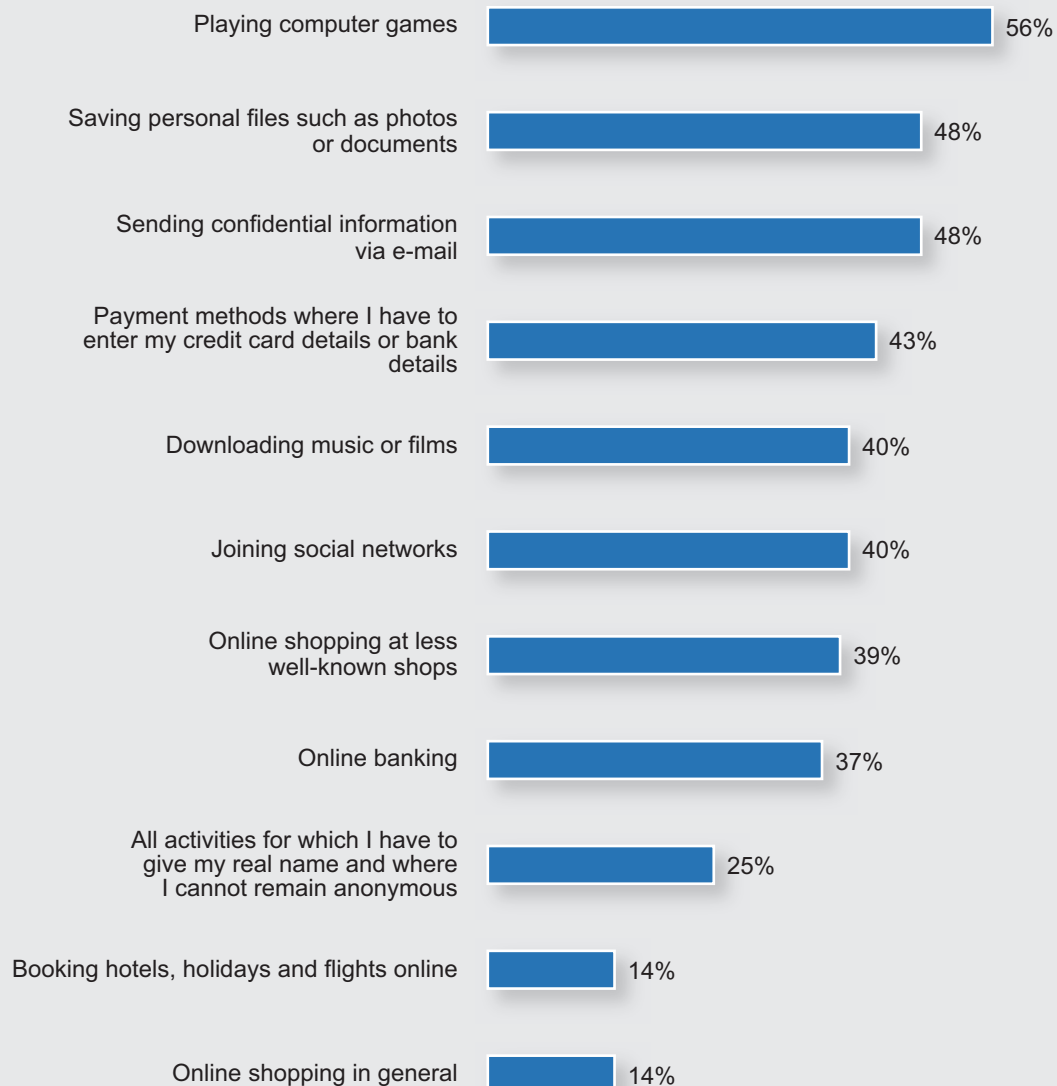
Safety precautions when using the Internet



In view of the associated risks, many people also deliberately avoid certain functions of the Internet, including 56 % of users who avoid taking part in online computer games. Almost 50 % of people avoid saving personal files such as photos or documents online and avoid sending confidential information via e-mail. 43 % of users avoid using payment methods that require them to enter their credit card numbers or bank details, and for reasons of safety a similar number of users deliberately avoid downloading music or films, joining social networks or making purchases from less well-known shops. 37 % have doubts about the safety of online banking and therefore do not conduct their banking transactions online. A quarter of users avoid as a matter of principle all activities for which they have to disclose their real name.

Avoidance of Internet functions due to safety concerns

"I deliberately avoid the following Internet functions for safety reasons, or because I don't want to enter my personal details"...



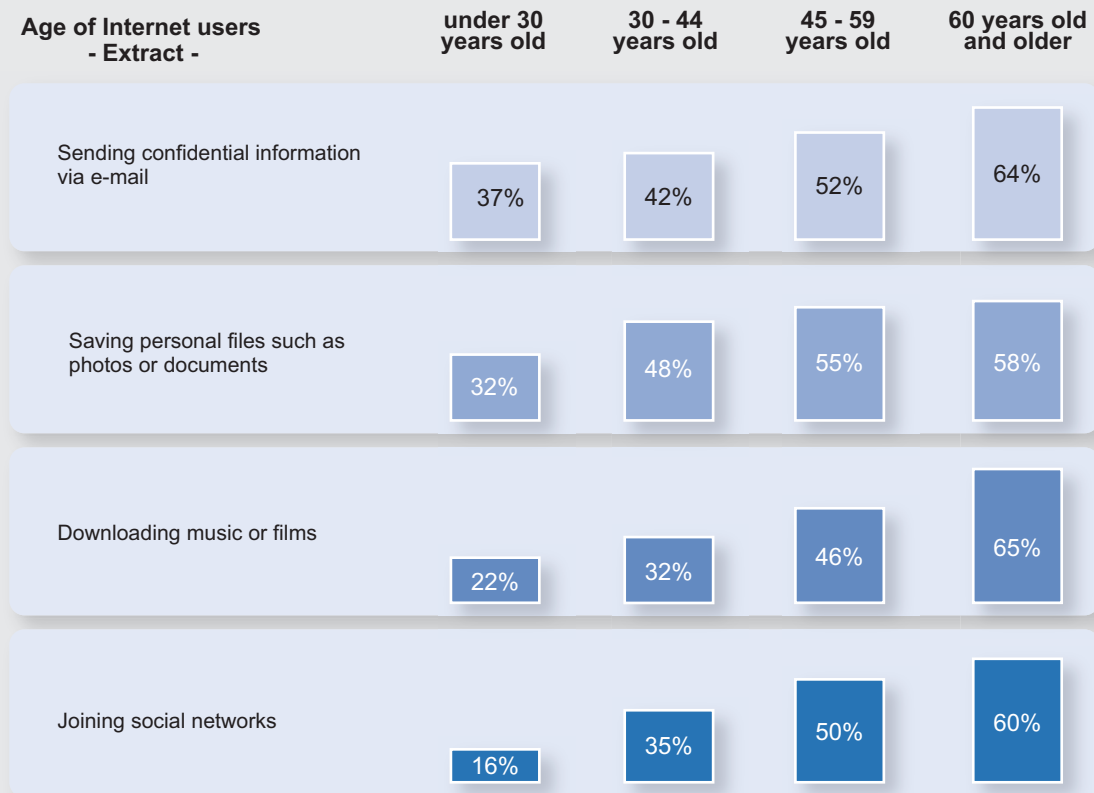
Based on: Federal Republic of Germany, Internet users from 16 years of age

Source: IfD survey 11015, October 2013

Younger Internet users avoid certain online functions less frequently than older users; 37 % of younger users, but 64 % of older users, avoid sending confidential information by e-mail. There is also a clear age-related correlation in terms of self-imposed restrictions when it comes to saving personal files. 22 % of under-30s avoid downloading music or films for safety reasons, although only 16 % of this age group deliberately avoid joining social networks for the same reason. In contrast, this figure is 60 % among users aged 60 and over.

Age-related avoidance of individual activities

"I deliberately avoid the following Internet functions for safety reasons, or because I don't want to enter my personal details"...

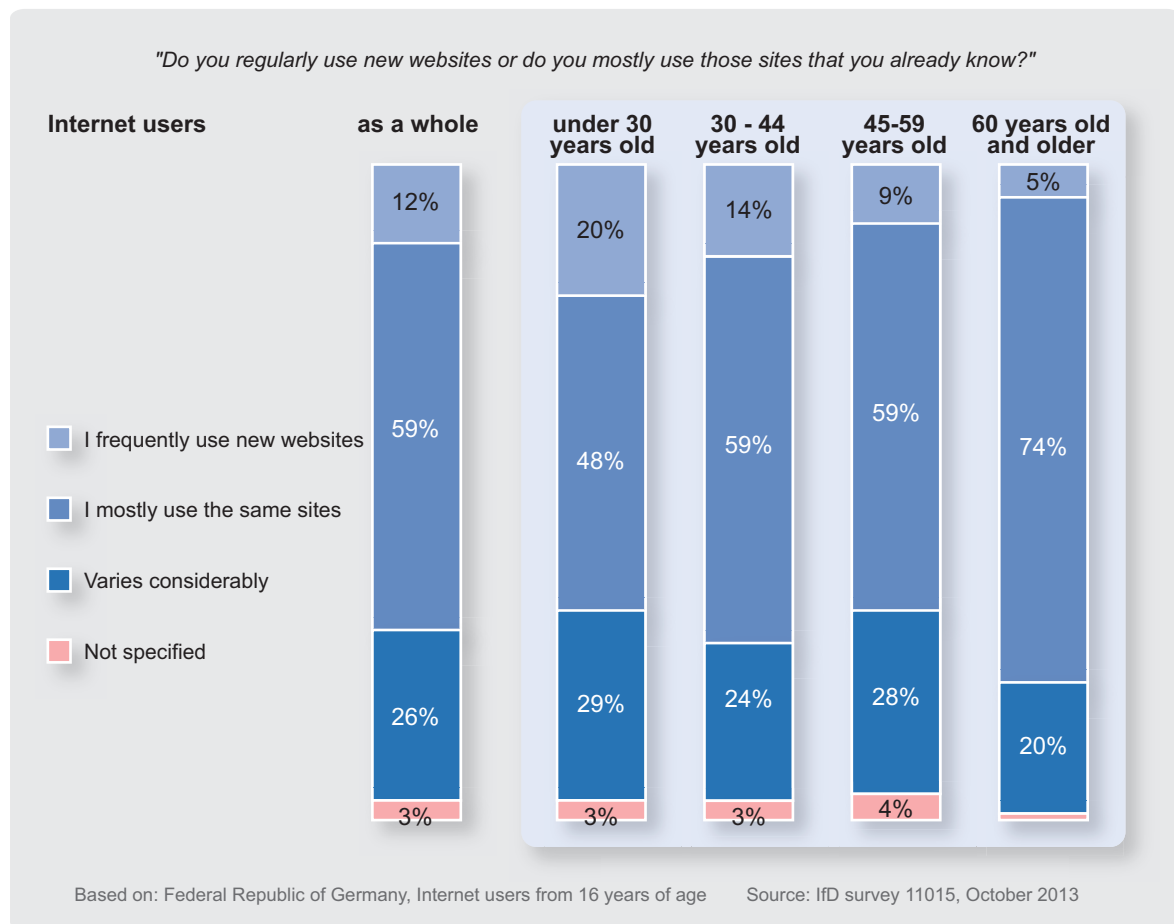


Based on: Federal Republic of Germany, Internet users from 16 years of age

Source: IfD survey 11015, October 2013

Internet users tend not to stick to their beaten tracks. Younger users are more frequently willing to open unknown websites than older users. One in five users under 30 frequently use new websites, while this figure drops to 9 % for 45-59-year-olds and to 5 % among users aged 60 and over. Conversely, 74 % of users aged 60 and over report that they tend only to use sites with which they are familiar, with this figure dropping to 60 % for the mid age range and 48 % among younger users.

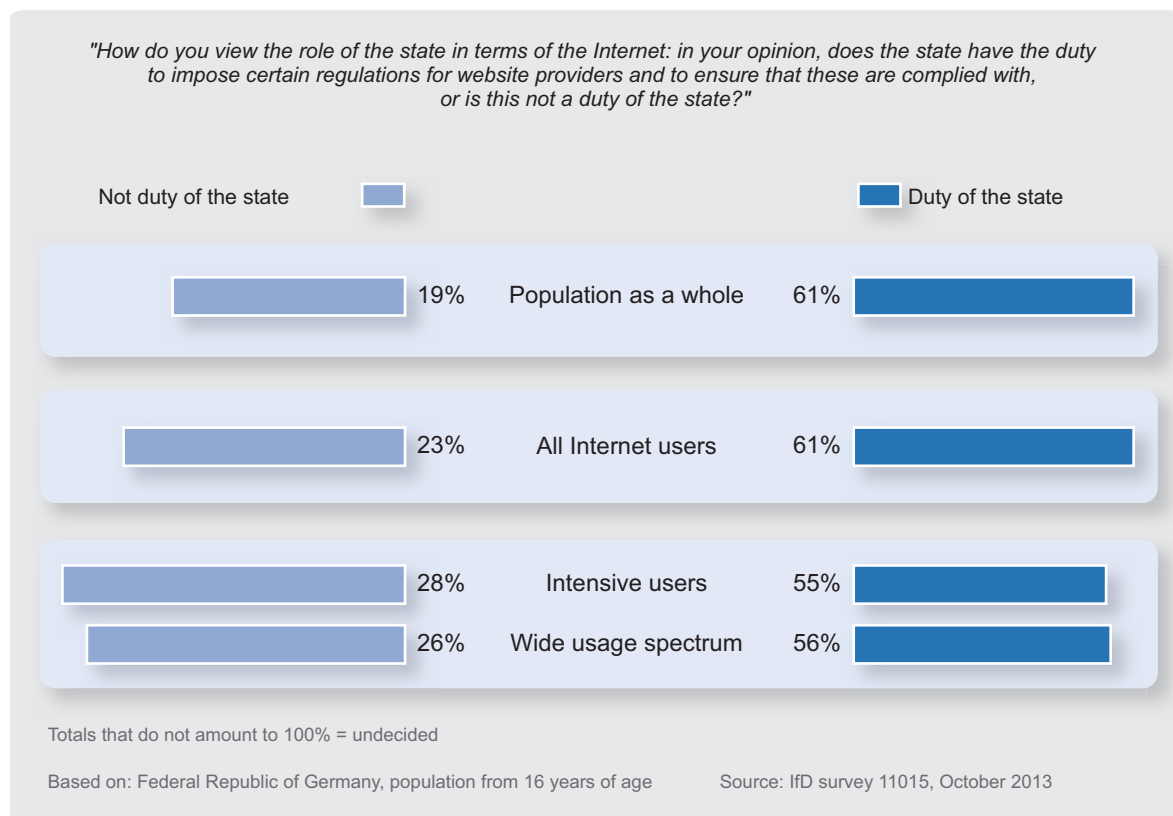
Use of new websites



5. Freedom versus regulation on the Internet

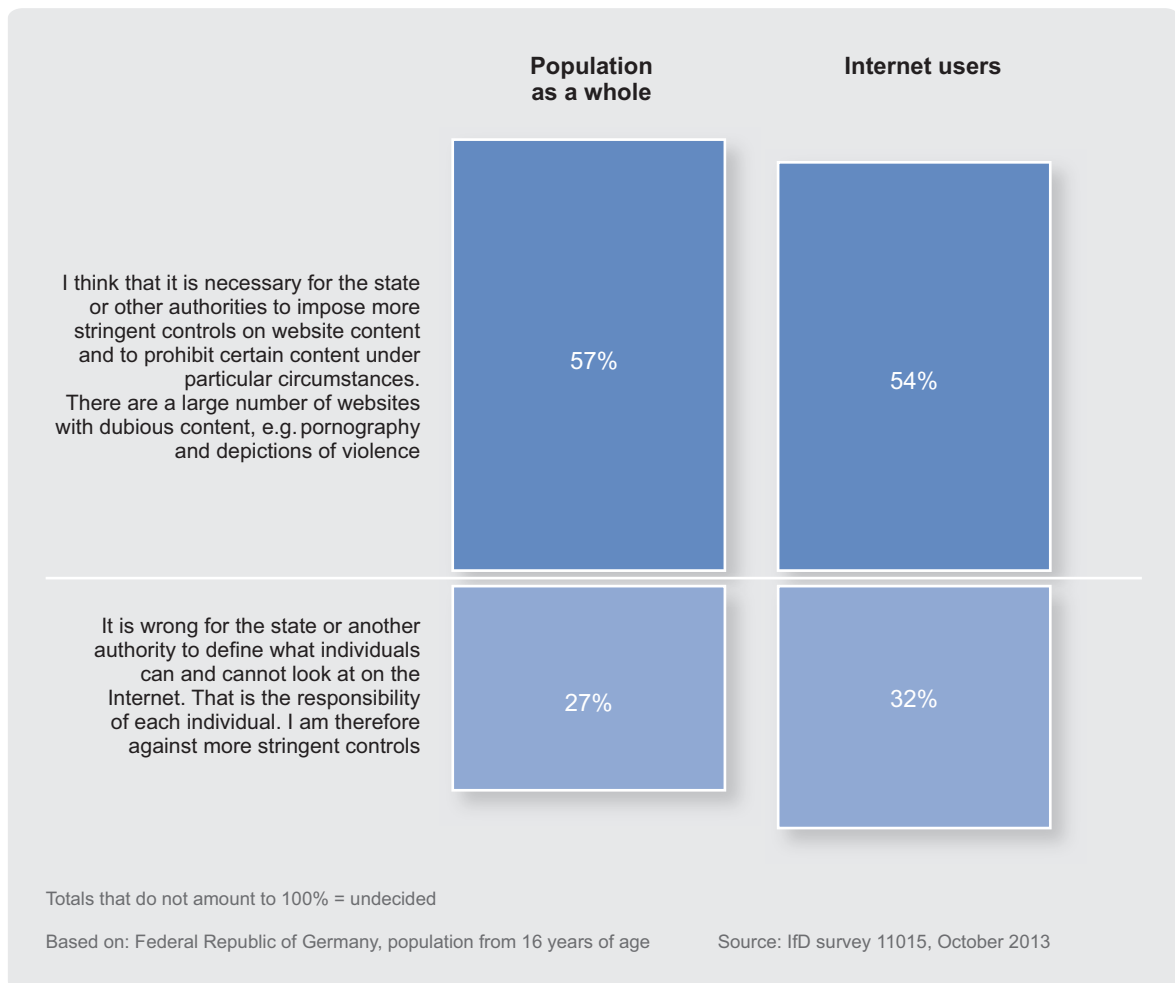
Even though most Internet users are essentially confident that they can make a good assessment of the dangers and risks associated with the Internet and therefore wish to use the Internet with complete freedom and absent of any restrictions, both the majority of Internet users and the majority of the population as a whole are convinced that the state should impose certain regulations for website providers and should ensure that they are upheld. 61 % of both Internet users and the population as a whole believe that this is the responsibility of the state, while 19 % of the population and 23 % of Internet users do not see it as a duty of the state. Of those who use the Internet most frequently and with a particularly wide spectrum of use, only just over a quarter are convinced that no state regulations are required for online content providers.

Most people believe that state regulations are necessary



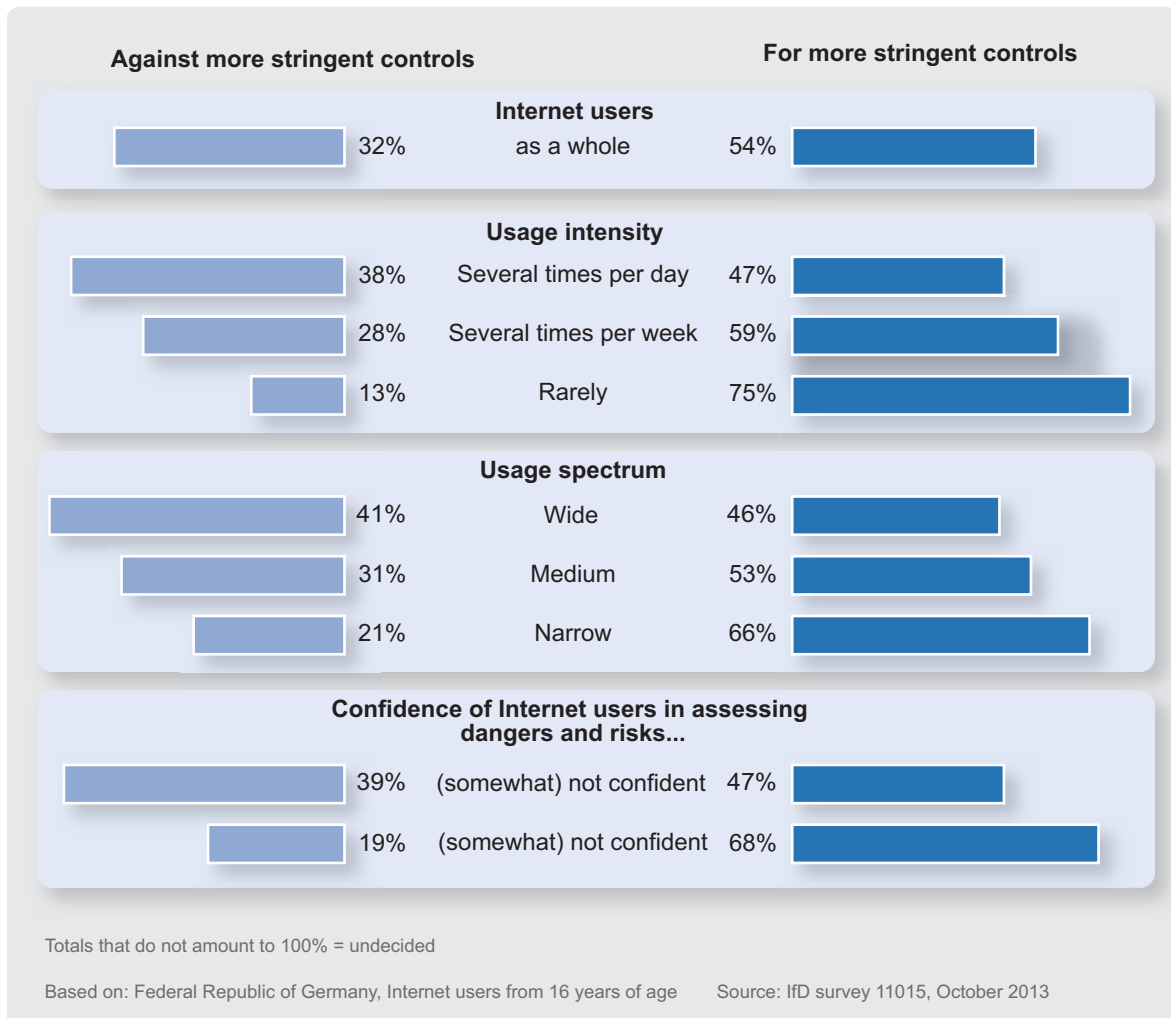
The support for demands to impose more stringent controls on the Internet in light of the large amount of dubious content, and to prohibit certain content under particular circumstances, is slightly more reserved. However, this too is supported by a clear majority; 57 % of the population and 54 % of Internet users agree with more stringent control and regulation of Internet content. 27 % of the population and 32 % of Internet users reject this idea with the comment that individuals themselves are responsible for which online services and websites they use.

The case for more stringent Internet controls



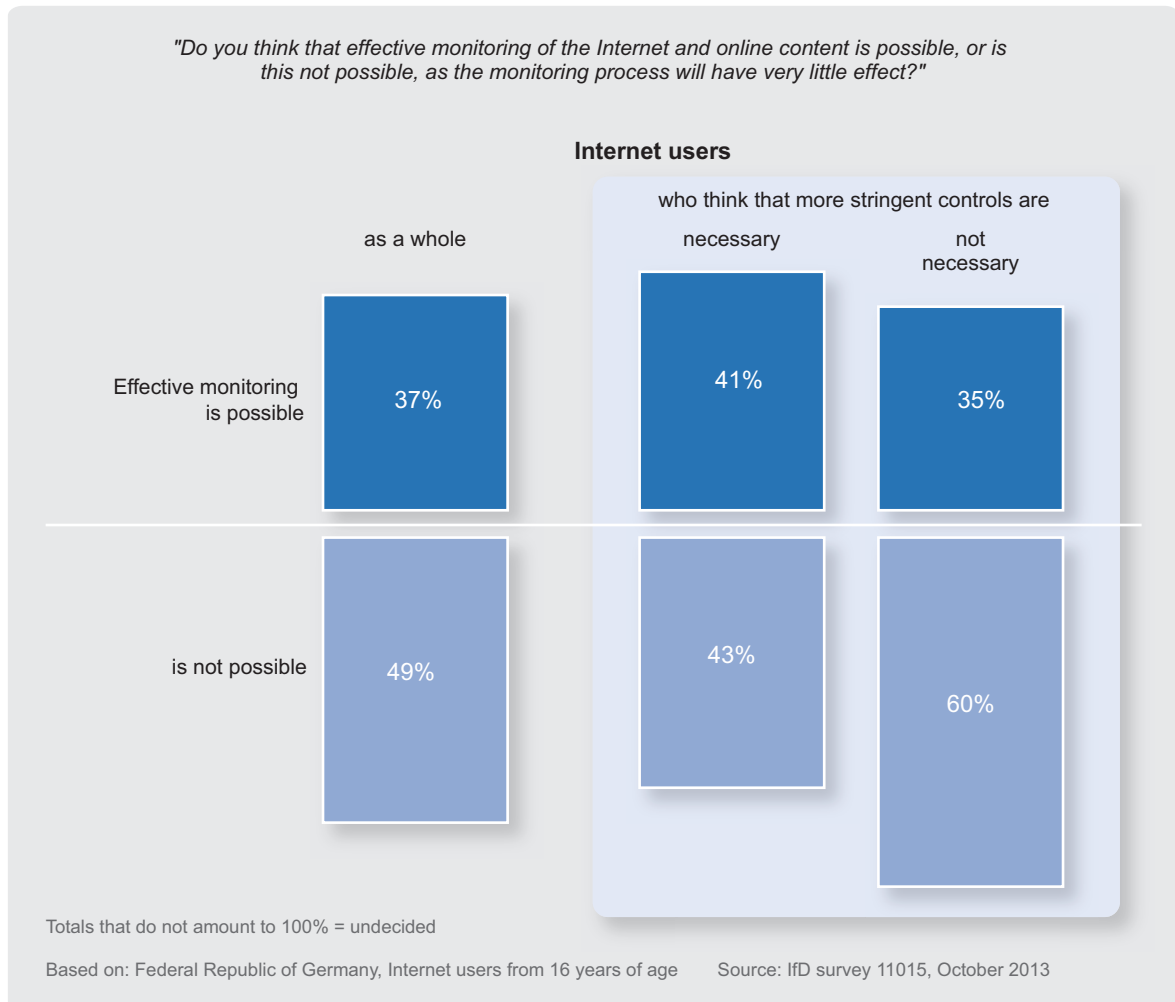
Opinions between the different user groups in relation to more stringent control of online content and the importance of personal responsibility differ substantially. However, even among those who use the Internet most regularly and with a particularly wide spectrum of use, the majority are in favour of strengthening controls, although this majority is a lot smaller than among those people who use the Internet comparatively rarely. Around half of those who use the Internet several times per day are in favour of more stringent controls, whereas this figure increases to three quarters for those who use the Internet only rarely. Conversely, 38 % of intensive users emphasise that the use of online services should be the sole responsibility of the individual. Of those who use the Internet only rarely, merely 13 % share this opinion. We acquire a similar impression when considering the spectrum of Internet use. People with a wide spectrum of use are far more frequently opposed to greater stringency in the control of online content than those who use relatively few online services. Naturally, therefore, they are far more prone to mention the importance of personal responsibility. Support for more stringent controls is also influenced largely by the extent to which people feel confident in making their own assessment of the dangers and risks associated with the Internet; there is far above-average support for more stringent controls among those users who feel a certain degree of uncertainty here.

Varying degrees of support for more stringent controls among different user groups



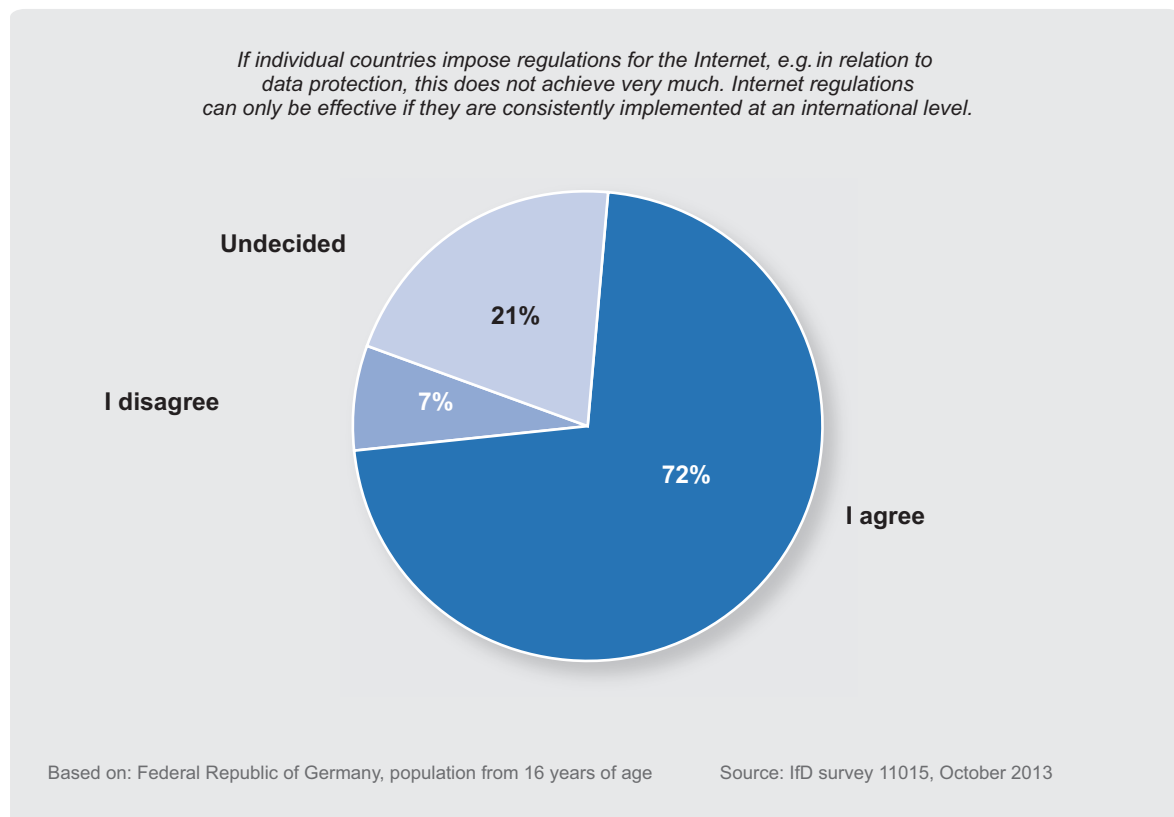
There are widespread doubts as to whether and to what extent it would even be feasible to control and monitor the Internet. Just 37 % of Internet users think that effective controls would be possible, 49 % explicitly mention their doubts in this respect, and the rest do not feel equipped to judge. Also, 43 % of those in favour of more stringent control of Internet content are sceptical in this regard, while 41 % of this group are confident that effective controls can be successfully put in place.

The majority have doubts about whether effective monitoring would be feasible



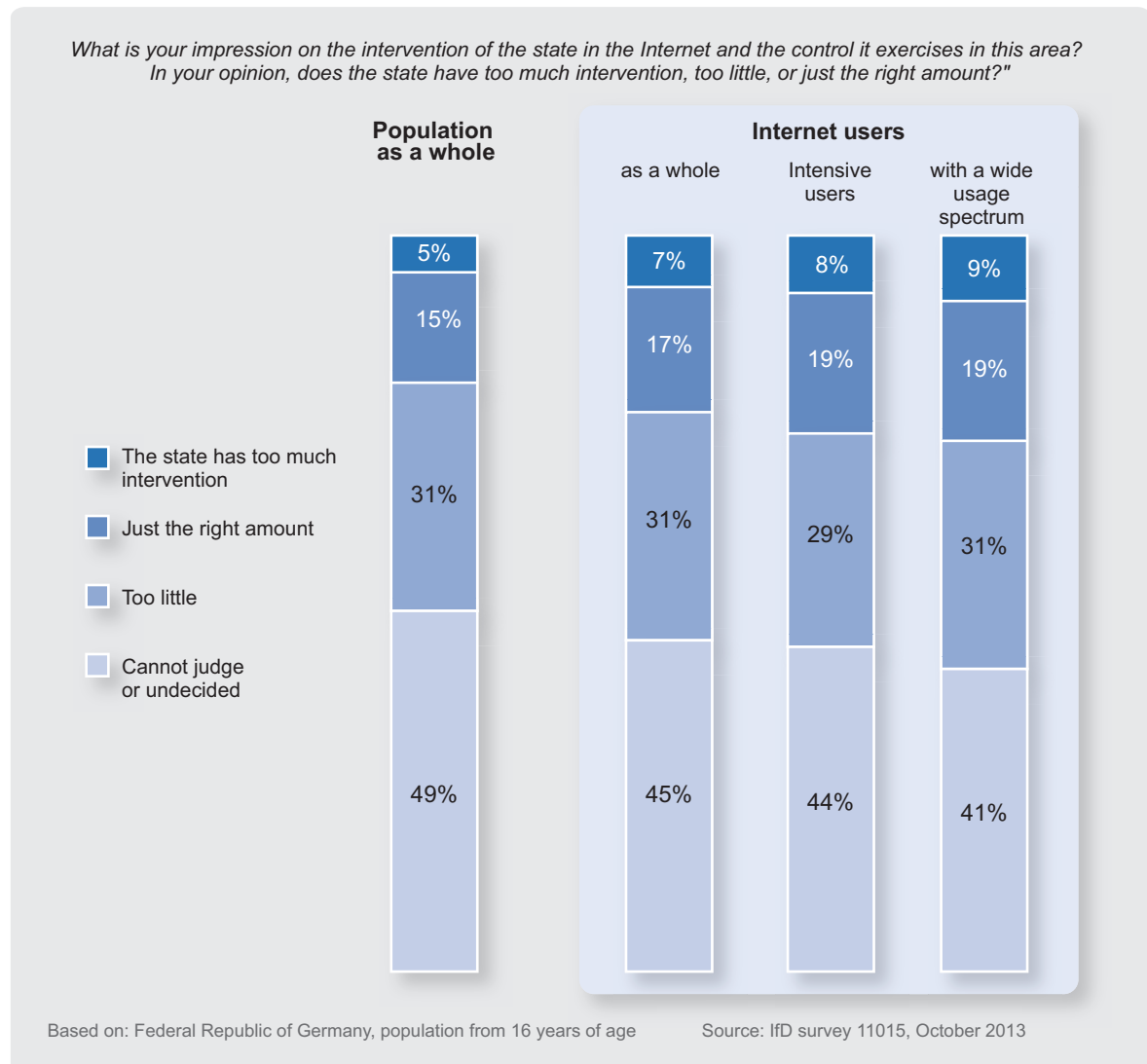
There is a broad consensus with regard to the need for cross-national regulations, entirely irrespective of whether the person expressing the opinion is in favour of, or opposes, more stringent state controls. Not even one in ten people expects purely national measures and regulations to have any effect; 72 % are convinced that regulations can only be effective if they are consistently implemented on an international level.

National regulations alone are considered less effective



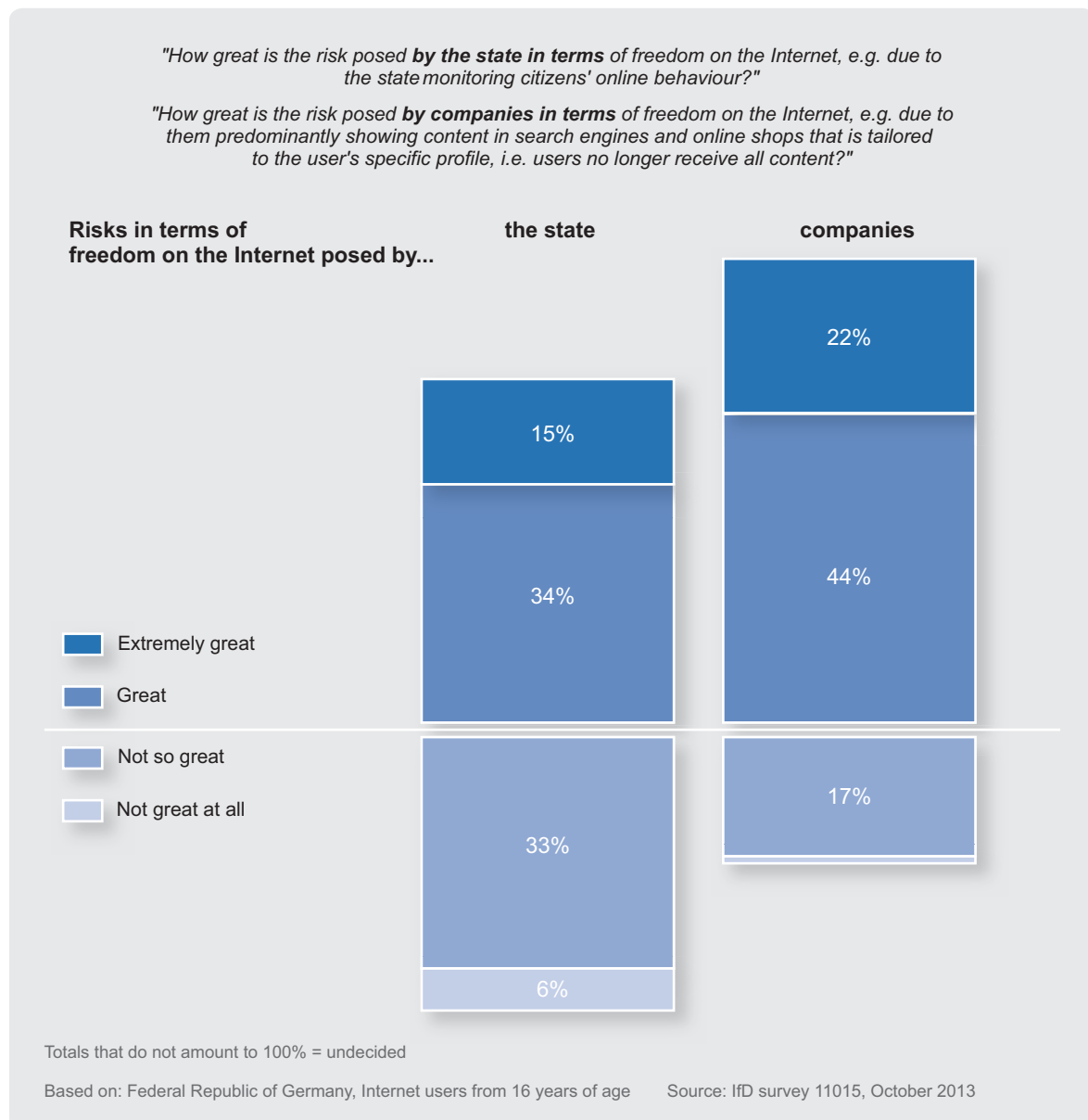
Large parts of the population and the Internet users have no more than vague notions of the extent to which the state is active in this field and what control it exercises. 49 % of the population as a whole and 45 % of Internet users do not feel confident to judge whether the state so far has exercised too much or too little control and regulation of the Internet. Those who do express a concrete opinion tend to point to failures. Around a third of both the population as a whole and the Internet users criticise insufficient state commitment in this area, with a minority believing that the frequency with which the state has intervened on the Internet to date has been excessive. Only 7 % of Internet users share this opinion. Even those who use the Internet most frequently and with a particularly wide spectrum of use do not provide a more critical response to this question.

General uncertainty relating to the extent of state intervention



At the same time, there is the worry that freedom on the Internet could be threatened by the state, for instance if it were to monitor the behaviour of citizens online. Around one in two users rate this risk as considerable or even very considerable, whereas only 6 % do not view this as any cause for concern. However, the concerns that providers of search engines or online shops no longer display the entire content, and instead predominantly show only content that is tailored to the user's specific profile, are far more frequent. Two thirds of Internet users are convinced that this poses a great threat to freedom on the Internet, while not even one in five rate this risk as fairly low.

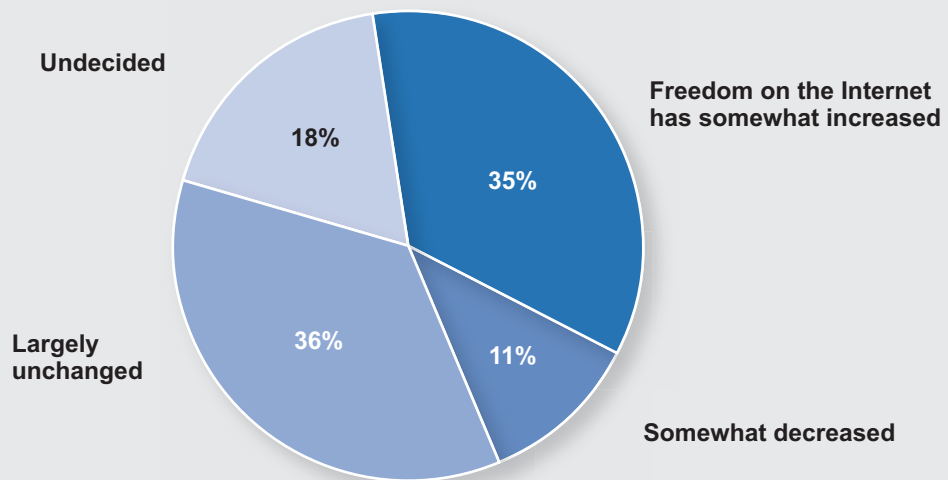
Risks in terms of freedom on the Internet



Even though many Internet users believe that state activities pose a threat to freedom on the Internet, and that the practice among companies of tailoring individual services towards specific target groups is an even greater risk, up to now only very few Internet users feel that this has led to greater restrictions of freedom on the Internet. When considering changes observed over recent years, those who have noticed any changes at all tend to see them in a predominantly positive light; 35 % of Internet users believe that freedom on the Internet has increased, while just 11 % believe that it has decreased somewhat. 36 % have not seen any changes. Particularly regular users of the Internet with an above-average range of applications share this view, also.

Only very few people believe that restrictions on freedom have increased

"Do you have the impression that freedom on the Internet over recent years has somewhat increased, somewhat decreased, or remained largely unchanged?"



Based on: Federal Republic of Germany, population from 16 years of age

Source: IfD survey 11015, October 2013

6. Conclusion

The results of the study show that the population as a whole predominantly associates the Internet with a range of advantages, though they also consider it to pose a number of risks at the same time. For the most part, the perceived risks associated with the Internet are only tied in with negative personal experiences to a limited extent and by and large do not depend on the extent of personal use. People who use the Internet several times per day and for a comparatively wide range of applications are generally less worried (or not more worried) about these risks than those who use the Internet only rarely or who only make use of relatively few websites that they are already familiar with.

The vast majority of the population, and in particular the Internet users, believe that in general, people exercise insufficient care when handling personal data, which in turn comes with the risk that large numbers of people will reveal too much about themselves online. However, only very few people believe that this actually refers to them personally.

Asked to provide a self-assessment, the majority of Internet users are largely confident of their ability to judge the dangers and risks associated with the Internet. However, considerable uncertainty persists in many areas. This uncertainty is keenest in relation to the storage and use of personal data. Internet users predominantly rely on technical solutions such as anti-virus software to protect themselves from potential dangers and risks, and many users also avoid particular online activities. These include opening e-mail attachments from unknown senders and accessing suspicious-looking websites.

Citizens also believe that the state has a duty to protect people from dangers and risks associated with the Internet. According to the opinion of the majority of the population, it is the duty of the state to impose certain regulations for website providers and to ensure that they are upheld. Having said that, there is also a broad consensus that national measures and regulations alone cannot provide effective protection for Internet users.

There is a high degree of uncertainty in terms of the extent of current state influence or control. The general tendency is towards believing there is too little state influence or control; the demand for more stringent controls increases as users' experience or intensity of use decreases.

Around half of the population take a dim view to excessive control by the state, asserting that state monitoring could potentially endanger freedom on the Internet. Among those surveyed, companies that no longer display the entire content, instead increasingly showing only the content that is tailored to the user's specific profile, are considered an even greater threat to freedom on the Internet.

In conclusion, it remains clear that people believe the advantages of the Internet outweigh the associated risks. However, due to the complexity of the Internet and the variety of associated risks, they also seek guardrails in the digital environment.

7. Appendix

Study profile

Methodological responsibility and execution:	Allensbach Institute (IfD)
Sample:	1,487 people constituting a representative cross-section of the population aged 16 years and older in the Federal Republic of Germany. Of these, 1,109 interviews with Internet users.
Method:	Face-to-face interviews
Number of interviewers:	440
Survey period:	1 to 14 October 2013
Contracting body:	German Institute for Trust and Safety on the Internet (DIVSI), Hamburg, Germany