

2011 ISACA Shopping on the Job Survey: Online Holiday Shopping and BYOD Security

*Prepared by the Ketchum Global Research
Network*

1 November 2011

www.isaca.org/online-shopping-risk

- Objectives

- Determine how employees use their work-supplied devices—and personal devices they also use for work—especially as this use pertains to online shopping during the November-December holiday season.

- *Note:*

- For the purpose of this report, consumers who have a work-supplied device or use a personal device for work are referred to as: “consumers using work devices.”
- BYOD means “bring your own device” regarding those who use personal devices for work.

- Key focus areas

- Use of work devices
- Approach and attitudes to computer security
- Risk to online identity
- Company policies
- Knowledge of and adherence to corporate IT policies
- Online holiday shopping

- Methodology

- ISACA® included 10 questions in a weekly national Omnibus conducted by M/A/R/C Research.
- The survey was fielded online between 27 September and 30 September 2011. All of the respondents met the criteria to take the survey, though not all could answer every question.
- The total sample was 1,224 respondents. 846 of total respondents have a computing/mobile device for work purposes and 775 of total respondents spend time online shopping using work-supplied or personal devices.
- At a 95% confidence level, the margin of error for the total sample is +/- 2.8%. For the sample of respondents that have a computing/mobile device for work purposes, the margin of error is +/- 3.3% and +/- 3.5% for respondents who spend time shopping online using work-supplied or personal devices.

- Nearly one-third of consumers say that they plan to do more shopping than last year using their work-supplied or BYOD device (32%), potentially increasing risk for organizations.
 - On average, consumers with a work-supplied device or personal device used for work purposes plan to spend 32 hours shopping online this holiday season.
 - Younger consumers plan to spend more time shopping online using a work-supplied or personal device for work purposes. They also plan to do as much or more online holiday shopping this year as they did last year.
 - Consumers age 18-49 are more likely than their older counterparts to do the following:
 - On average, use their work-supplied device for online shopping for more hours (three vs. one).
 - On average, use their personal device used for work (BYOD) for online shopping for more hours (seven vs. five).
- Many consumers who use their work device feel comfortable using their company's equipment for personal activities that could compromise the IT network.
 - One-third of consumers (34%) have clicked on a link in a social media site (up from 19% in 2010).
 - More than one in 10 (13%) click on e-mail links from someone they do not know.

Key takeaways

- Consumers who are unclear about organizational IT policies are typically using personal devices for work and are less likely to be aware or concerned about Internet safety.
 - Those unaware of their organization’s policy on work-related devices are more likely to have a personal device (83%) that they use for work and less likely to have a work-supplied computing (31%) or mobile computing device (4%).
 - Consumers who are unclear about their organization’s policy on work-related devices are less likely than those who are aware of policies to say they had clicked on a link on a social media site (27% vs. 39%) and have used mobile shopping applications (6% vs. 15%).
 - IT networks may be most vulnerable in the three weeks after Thanksgiving.
 - The majority of shoppers indicate that the first weeks of December (38%) and September through November (28%) are their primary shopping times.

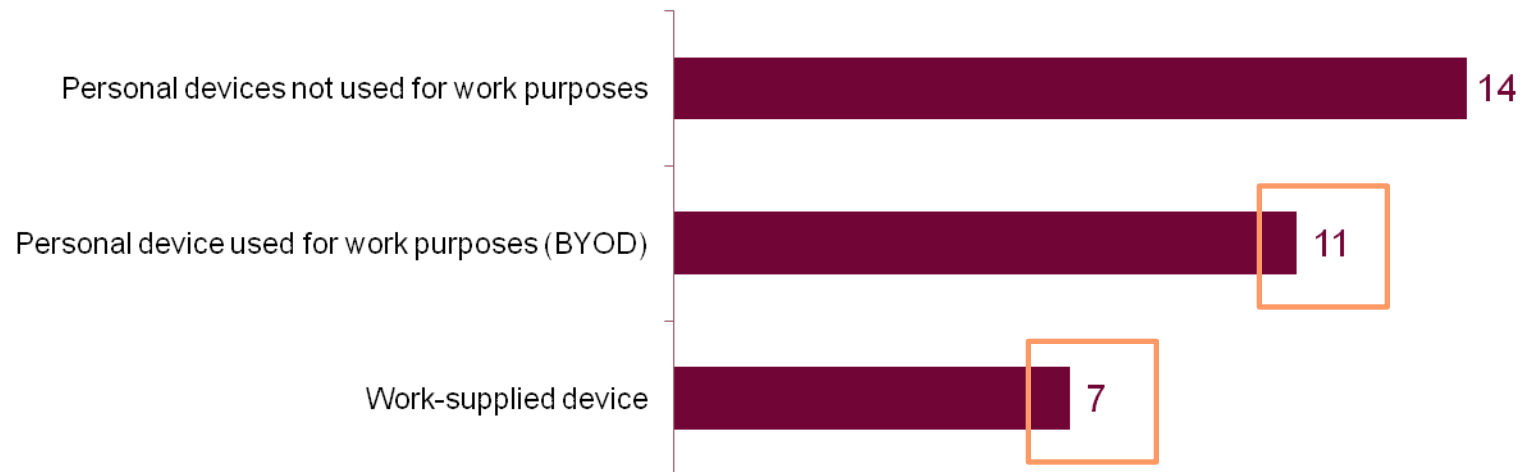
- Consumers using work devices are becoming increasingly concerned about the risk of new technology such as location-based tracking, showing an increased awareness of the consequences of compromising work information.
- While consumers are becoming more aware of the risk associated with using their work devices for personal activities such as shopping, they continue to rely on their IT department for security and are unsure of company policies.
 - The BYOD trend—those who use their personal device for work purposes—increase the risk of threat to company security.
 - It is more likely that companies have policies governing activities on work-supplied devices rather than personal devices that may be used for work, or policies preventing work activity on personal devices.
 - Educating employees and specifying policies for work-supplied devices and personal devices used for work are key measures to improving security.
- Online shopping will most likely continue to occur at work and on work devices, as consumers plan to shop more than last year.
 - Convenience and new applications and technology, such as daily deals and quick response (QR) codes, continue to encourage online shopping.
 - While the number of hours spent shopping while at work may have decreased year-over-year in 2011, the use of personally owned devices with corporate access, coupled with uncertainty about policy, and the assumption of IT backup, threatens company security and proprietary information.

Average employee who shops online to spend 18 hours shopping on devices also used for work activities



- Consumers who will holiday shop online and have either a work-supplied device or personal device used for work purposes plan to spend 32 hours on average shopping online this holiday season, with 18 of those hours in total on a work-supplied or BYOD device

Average Hours Spent Shopping Online This Holiday Season



Q6.a During the holiday season (November and December), how much time in total will you spend shopping online using a work supplied device? (PC, Smartphone, laptop). n=868

Q6.b During the holiday season (November and December), how much time in total will you spend shopping online using a personal device? (PC, Smartphone, laptop). n=868

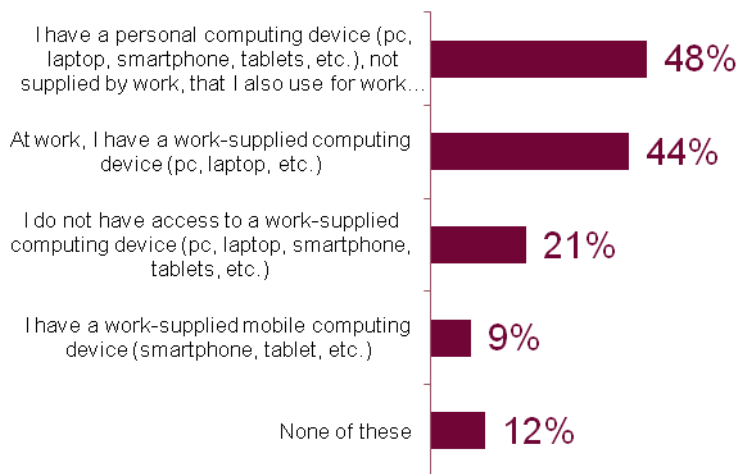
Q6.c During the holiday season (November and December), how much time in total will you spend shopping online using a personal device for work purposes? (PC, Smartphone, laptop). n=868

Consumers are mixing the use of personal devices for work and personal purposes



- Of those who have either a work-supplied device or BYOD, almost half have clicked on an e-mail from a company or organization other than their employer and one-third (34%) have clicked on a link to a social media site.
 - Daily deal sites, such as Groupon and Living Social, are becoming increasingly popular (29%).
 - Men are more likely than women to use their work device for non-related work activities. One-in-four men are likely to use their work e-mail address for personal online shopping or other non-work related online activities, more so than women (25% vs. 19% respectively).

Work-supplied & B.Y.O.D.



Among those having a computing/mobile device for work purpose	2011
Clicked on a link in an e-mail sent by a company or organization I recognize, other than my employer	49%
Clicked on a link on a social media site (e.g., Facebook, Twitter)	34%
Clicked on a daily deal (e.g., Groupon, LivingSocial)	29%
Used my work e-mail address for personal online shopping or other non-work related online activities	22%
Used mobile shopping applications	14%
Clicked on a link in an e-mail sent by someone I do not know	13%
Scanned a QR (quick response) code	7%

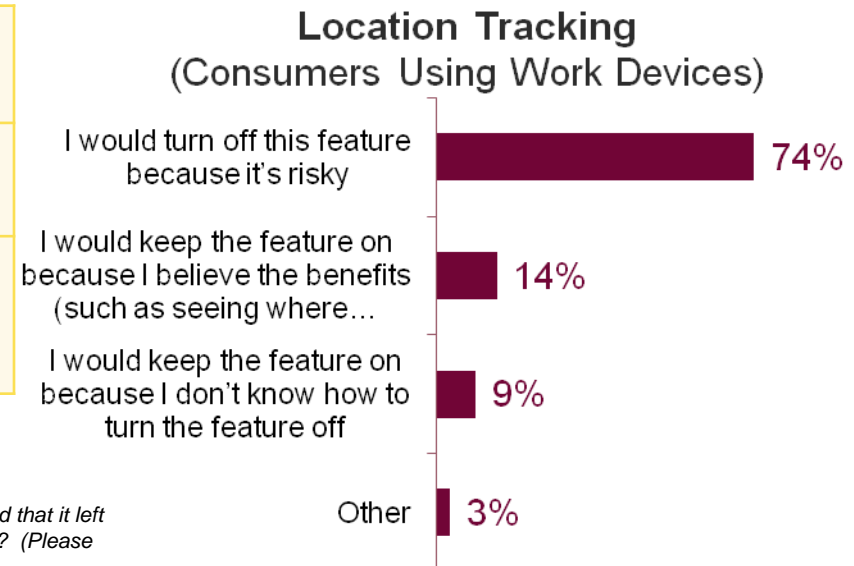
Q2. Which of the following apply to you? (Please select all that apply.) n=1,244

Q3. Which of the following have you done with a work-supplied device or personal device you've used for work purposes n=868

Concerns about identity security and location tracking are increasing

- Consumers who spend time shopping online using work-supplied or personal devices have started to use PayPal for secure servers to protect their purchases and identity (37%).
- There also appears to be increasing concern about the risk associated with new features. In particular, consumers are concerned about features such as their mobile device's ability to track their location.
 - Three-quarters (74%) say they would turn off user location tracking because of concerns such as stalking or identity theft, and 9% percent say they would keep it on only because they don't know how to turn it off.

Among those spending time on online shopping using work-supplied or personal devices	2011
When making a purchase online, I pay with PayPal or a similar secured service	37%
I or someone I know, have had personal or financial information that was supplied online compromised in the past 12 months	14%



Q10. Which of the following apply to you? (Please select all that apply. n=775)
Q4. If you knew that your mobile device had a feature that tracks your exact location and that it left you open to stalking or identity theft, which of the following statements is most accurate? (Please select one.) n=868

Workplace BYOD policies are either infrequent or there is low employee awareness

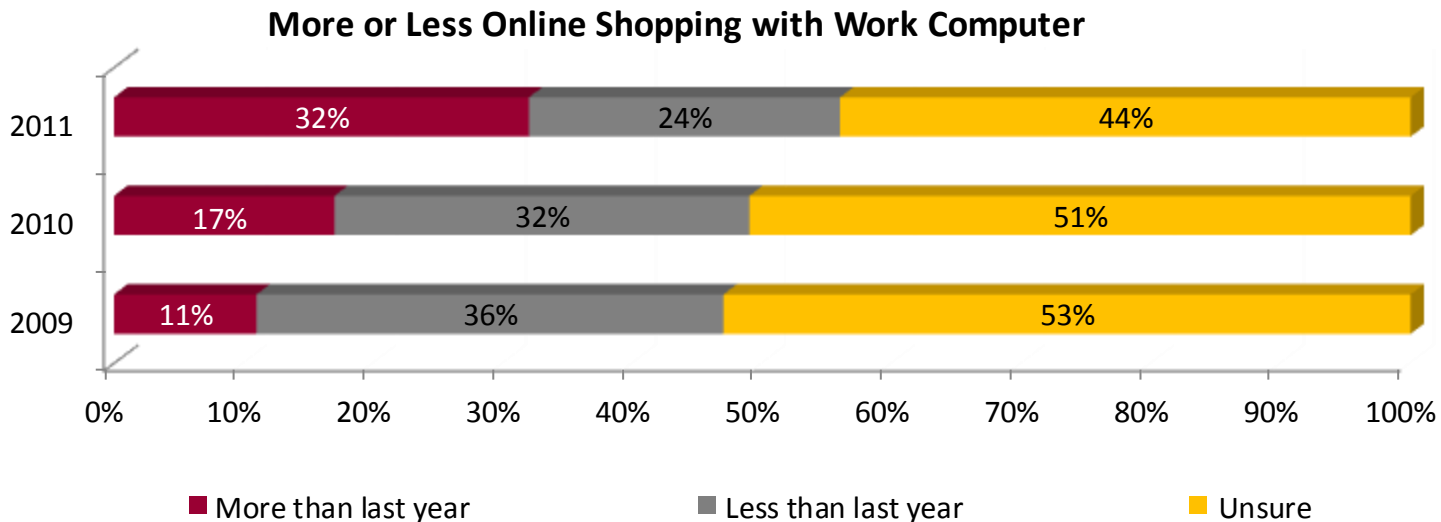
- Sixteen percent of respondents say their enterprise has no policy prohibiting or limiting personal activities on work devices.
- In addition, about one-fifth (20%) do not know if their enterprise has a policy on these topics, indicating a need for better communication.
- One-fifth of consumers (20%) note that their enterprise limits work activities on personal devices.
 - One in five (20%) men state that their enterprise has no policy prohibiting or limiting personal activities on work devices, compared to 12% of women

	2011
My organization prohibits or limits personal activities on work devices.	48%
My organization prohibits or limits work activities on personal devices.	20%
My organization has no policy prohibiting or limiting work activities on personal devices.	24%
My organization has no policy prohibiting or limiting personal activities on work devices.	16%
I don't know if my organization has a policy on these topics.	20%
My organization has a policy that prohibits employees from shopping online using work-supplied computers or smartphones (at work or elsewhere).	-

Q5. Does your organization have a policy about conducting personal activities on a work-supplied computing device, or conducting work activities on a personal computing device?
(Please select all that apply.) n=868

Consumers report they will do more shopping online this year

- With a 15 percentage point increase from last year, about one-third of respondents who spend time online shopping using work-supplied or personal devices say that they plan to do more online shopping this year than last year.
- Consumers age 50 and above plan to do less online shopping this holiday season than last, compared to consumers age 18-49 (46% vs. 21%).



2011: Q10. Which of the following apply to you? (Please select all that apply. n=775)

2010: Q8. Will you do MORE online shopping during this holiday season (November and December) this year compared to last year (at work or elsewhere) using your work computer. n=638

2009: Q10. Will you do more shopping during this holiday season (November and December) from your work computer (at work or elsewhere) compared to last year? n=629

***Note comparisons between 2009, 2010 and 2011 should be directional only, as response categories vary greatly from one year to the next.**

Convenience is a priority for online shopping at work or on work devices



- Convenience is a key driver for those who spend time online shopping.
 - 29% state that shopping online is easier than shopping in person.
 - Similarly, about one-fifth (19%) say that they have access to more stores online.
- More so than women, men prefer to online shop because of ease and convenience.
 - Nearly one-third (32%) of men plan to do their holiday shopping online this year because it is easier than shopping in person, compared to 25% of women.
 - Additionally, one in 10 (13%) men plan to do their holiday shopping online this year to avoid the travel costs incurred while shopping at stores in person, compared to 9% of women.
- Busy schedules, on the other hand, are not the key reason why consumers are shopping online. Just 6% say they are too busy to leave work to shop in person.

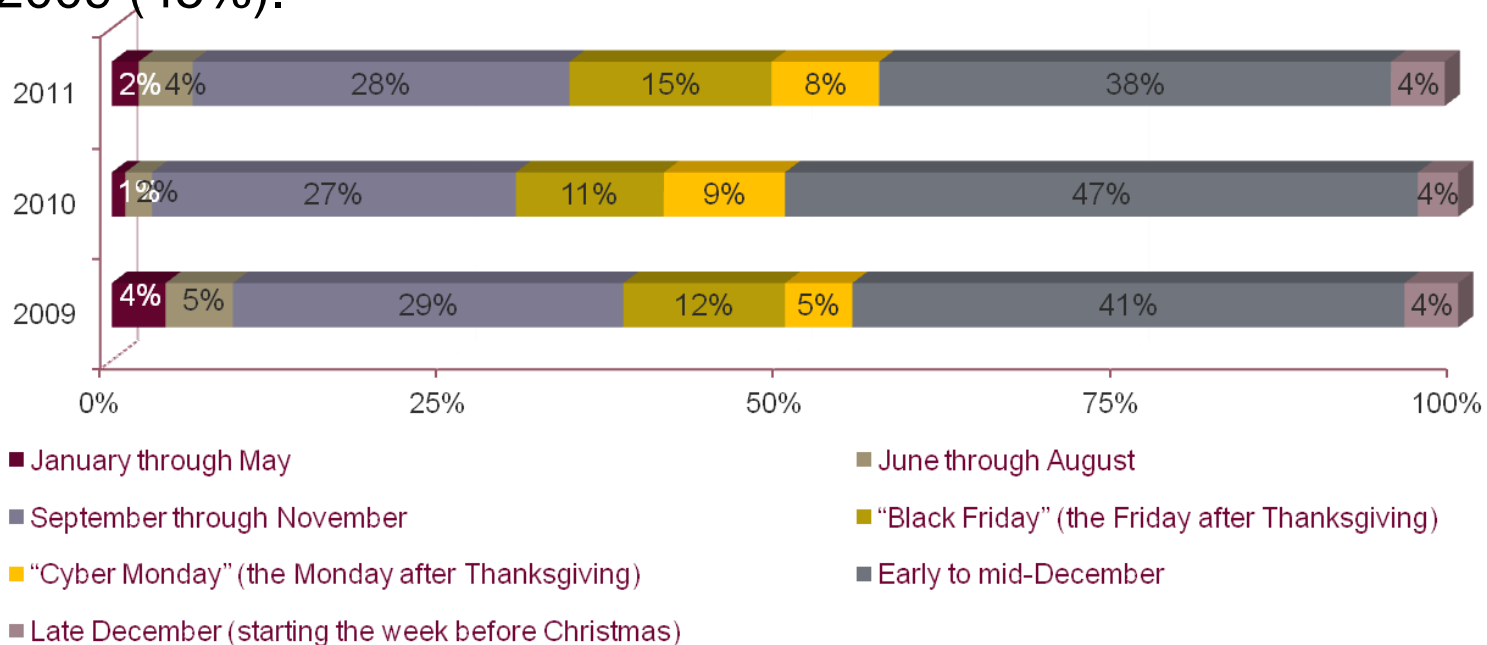
Among those spending time on online shopping using work-supplied or personal devices .	2011
It is easier than shopping in person.	29%
I have access to more stores online.	19%
Online sales are better than in-store promotions.	16%
It is faster than shopping in person.	14%
It lets me avoid the travel costs incurred while shopping at stores in person (e.g., gas, parking).	11%
I am too busy to break away from the office to shop in person.	6%
Other	5%

Q9. What is the primary reason you are planning to do your holiday shopping online this year? (Please select one.)
Among respondents spending time on online shopping using work-supplied or personal devices

Consumers are shopping earlier this year but overall, procrastination still rules



- Similar to 2009 and 2010, among consumers using work devices, the largest proportion (42%) intend to holiday shop online using their work computers in early to mid-December.
- However, this number is a slight decrease from 2010 (51%) and 2009 (45%).



2011: Q8. When do you do the majority of your online holiday shopping? n=775

2010: Q3. When do you do the majority of your online holiday shopping using your work computer (at work or elsewhere)? N=638

2009: Q2. When do you do the majority of your online holiday shopping using your work computer (at work or elsewhere)? N=629

*Note comparisons between 2009, 2010 and 2011 should be directional only, as response categories vary from one year to the next.

Awareness of security threats continues to grow, but reliance on company's IT department remains



- In a sharp decline from 2010, just 11% of consumers using work devices are not concerned that online shopping behavior may affect their organizations' IT network—which can conversely show that nearly nine in 10 have some level of concern. This indicates a growing awareness of how online shopping may pose a greater threat to company IT security.
- Yet, this concern may only pertain to their personal devices. Nearly a third (30%) of consumers spending time online are more concerned with protecting their personal smartphone or computer than their work-supplied devices.
- Although a decrease from last year, 28% of consumers using work devices to do holiday shopping assume their IT department is ensuring their work-supplied computer or smartphone's security.
 - Consumers age 18-24 are more likely than those 25 or older to assume that their work-supplied computer or smartphone has the most recent security patches (22% vs. 31%).
 - In general, men are less concerned than women that online shopping at work may affect their organization's IT network (14% vs. 9% respectively)

Among consumers spending time online shopping using work devices	2011	2010	2009
I assume that my IT department is ensuring that my work-supplied computer or smartphone has the most recent security patches.	28%	41%	30%
I always verify the security settings of web sites when shopping online using my work supplied computer or smartphone.	26%	31%	31%
I am not concerned that online shopping at work may affect my organization's IT network.	11%	24%	17%
I am more concerned with protecting the security of my personal computer or smartphone than my work-supplied computer or smartphone.	30%	18%	30%***

Q10. Which of the following apply to you? (Please check all that apply.)

*Q6. When Shopping Online Using Your Work Computer (From Work Or Elsewhere) Via A Wireless Connection, Do You Ensure That The Wireless Connection Is Secure?

**Q 5. I Do Not Know How To Verify The Security Settings Of Websites On My Work Computer..

***2009 Q9. Are You More Concerned With Protecting The Security Of Your Personal Computer Than Your Work Computer (At Work Or Elsewhere)?

***Note comparisons between 2009 , 2010 and 2011 should be directional only, as response categories vary from one year to the next.**

For more information:
Visit www.isaca.org/online-shopping-risk
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