



Ipsos Public Affairs

Centre for International
Governance Innovation

CIGI-IPSOS GLOBAL SURVEY INTERNET SECURITY & TRUST

2019 PART 5:

**CRYPTOCURRENCIES, BLOCKCHAIN, DARK
WEB & PRODUCT CERTIFICATION**



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GAME CHANGERS



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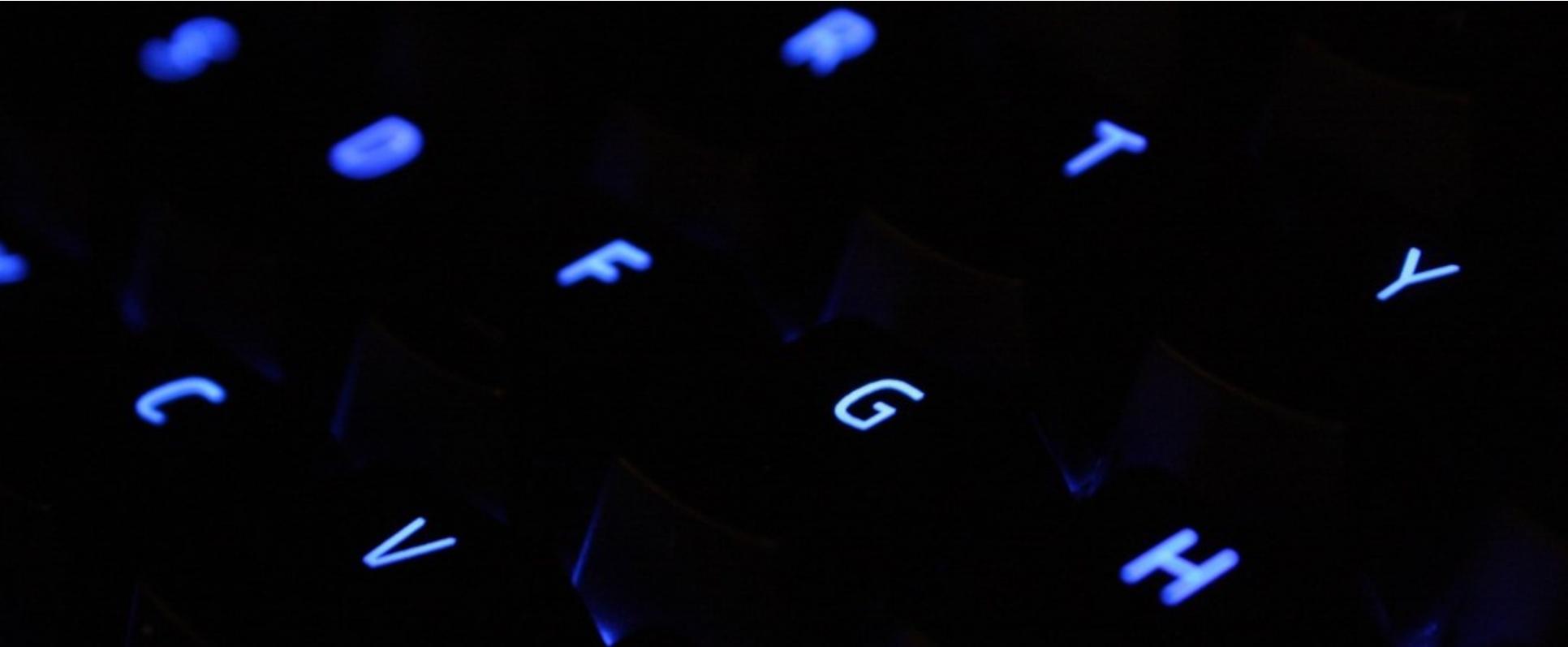
Dark Web

55

Crypto-Currencies

100

Blockchain Technology



METHODOLOGY & TAKE-AWAYS

METHODOLOGY

- This survey was conducted by Ipsos on behalf of the Centre for International Governance Innovation (“CIGI”) between December 21st, 2018 & February 10th, 2019.
 - All online economies were fielded between December 21st, 2018 & January 4th, 2019.
 - Below are the field dates, for the offline economies:
 - Pakistan: Jan 14th – Feb 10th
 - Tunisia: Jan 24th – 31st
 - Kenya: Jan 28th – Feb 7th
 - Nigeria: Jan 25th – Feb 7th
- The survey was conducted in 25 economies—Australia, Brazil, Canada, China, Egypt, France, Germany, Great Britain, Hong Kong (China), India, Indonesia, Italy, Japan, Kenya, Mexico, Nigeria, Pakistan, Poland, Russia, South Africa, Republic of Korea, Sweden, Tunisia, Turkey and the United States—and involved 25,229 Internet users. Twenty-one of the economies utilized the Ipsos Internet panel system while four (Kenya, Nigeria, Pakistan & Tunisia) utilized face-to-face interviewing, given online constraints in these economies and the length of the poll.
- The average LOI (length of interview) of the online survey was ~10 minutes. The average LOI for the face-to-face interviews was around 20 minutes, or more.
- In the US and Canada respondents were aged 18-64, and 16-64 in all other economies.
- Since 2018, the economies of Russia and South Africa have been included in the BRICS definition, which previously only included Brazil, India, and China (BIC). For analytical purposes, the BRICS data is tracked against the BIC data from previous surveys, though the comparison is not direct.
- Approximately 1,000+ individuals were surveyed in each economy and are weighted to match the population in each economy surveyed. The precision of Ipsos online polls is calculated using a credibility interval. In this case, a poll of 1,000 is accurate to +/- 3.5 percentage points. For the face-to-face interviews, the margin of error is +/-3.1, 19 times out of 20.

BRICS = Brazil, Russia, India, China, South Africa

APAC = Asia Pacific

LATAM = Latin America

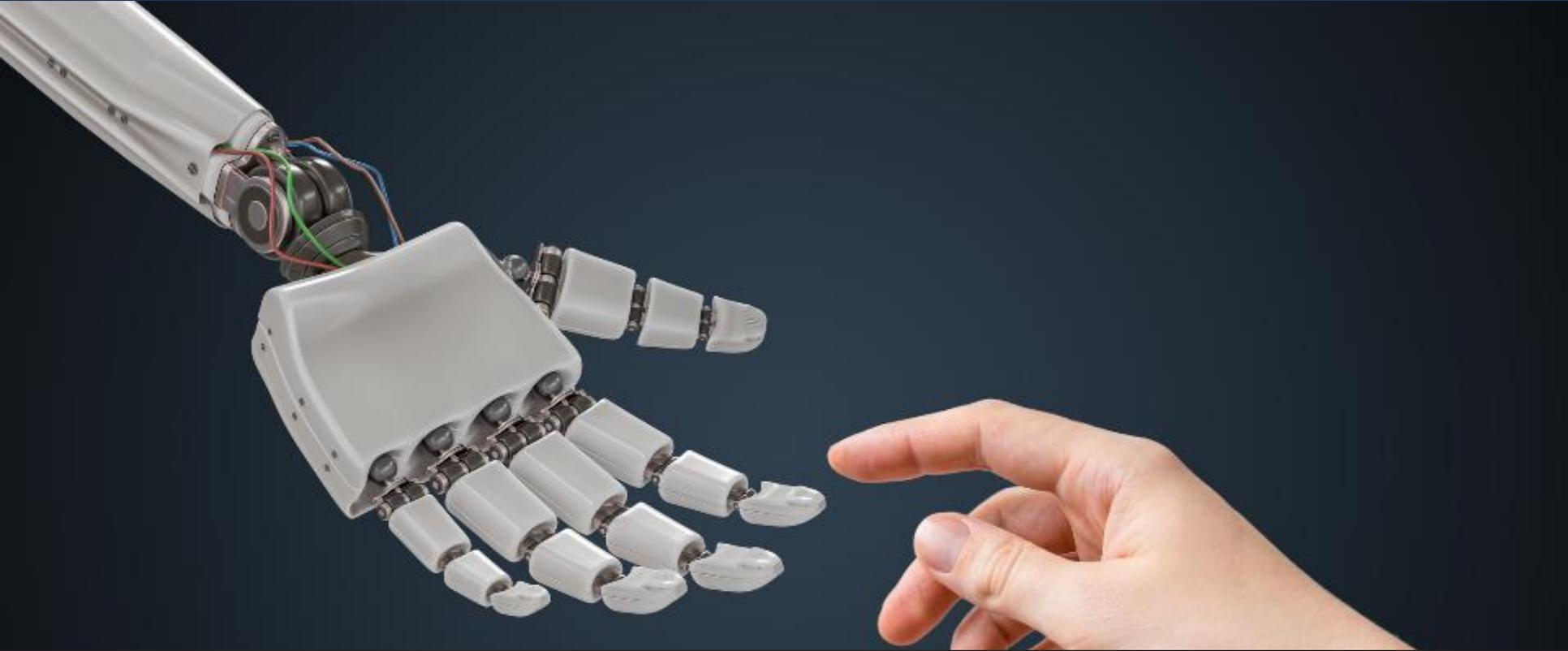
ECONOMY ABBREVIATIONS

Total	TL
Australia	AU
Brazil	BR
Canada	CA
China	CN
Egypt	EG
France	FR
Germany	DE
Great Britain	GB
Hong Kong (China)	HK
India	IN
Indonesia	ID
Italy	IT

Japan	JP
Kenya	KE
Mexico	MX
Nigeria	NG
Pakistan	PK
Poland	PL
Republic of Korea	KR
Russia	RU
South Africa	ZA
Sweden	SE
Tunisia	TN
Turkey	TR
United States	US

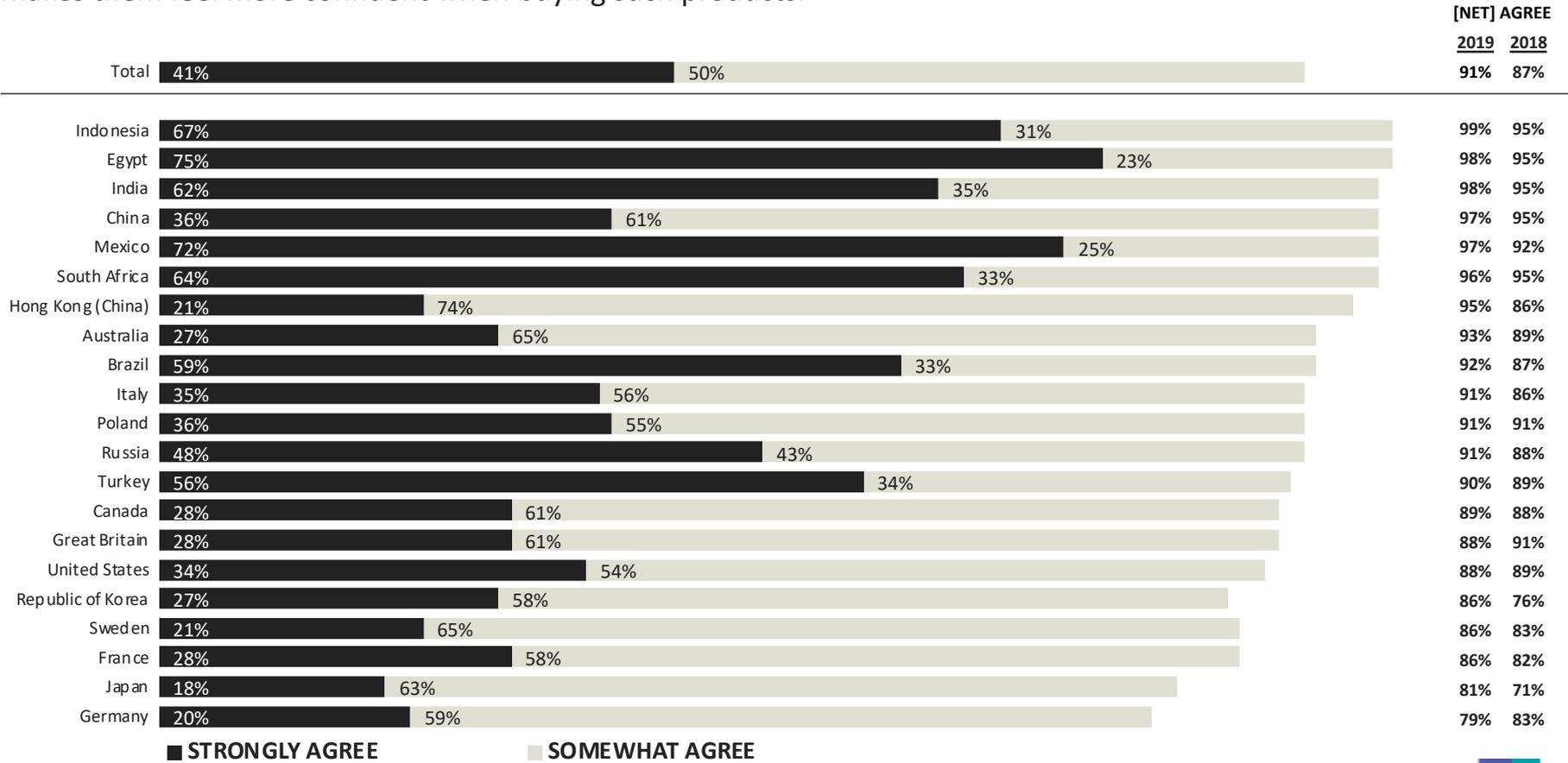
FIVE KEY TAKE-AWAYS

- 1** **Feeling Left Behind?** New technologies remain a mystery to most, as well under half of global citizens are at least *somewhat familiar* with cryptocurrencies (36%), the Dark Web (24%), and blockchain (22%).
- 2** Most familiar with blockchain predict that its impact will be felt in every sector of the economy & will rival the advent of the Internet. There is also a strong belief among those familiar that this technology needs to be implemented as widely as possible.
- 3** 7% of consumers worldwide say they're very likely to use cryptocurrencies in the next year, with intended use much higher in developing economies (BRICS, LATAM in particular) than developed.
- 4** Product security certification markings are becoming increasingly important. For a product valued at \$1k, global citizens are willing to pay as much as 30-35% extra for these markings. Citizens living in developing economies tend to assign more relative value to products with these markings.
- 5** A majority in every economy surveyed want the Dark Web shut down, despite the benefits cited by users. Stated usage is higher in developing economies than developed.

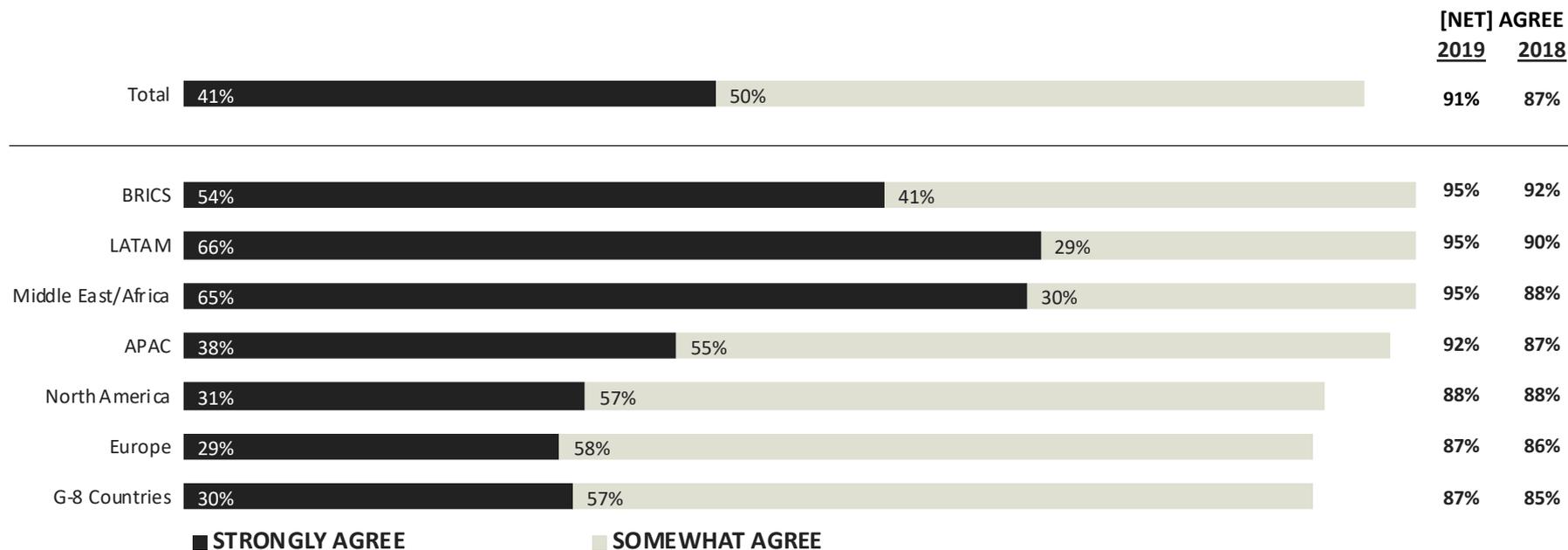


PRODUCT CERTIFICATION

Relative to 2018, a greater proportion (+4 pts) think that product security certification markings are important, as it makes them feel more confident when buying such products.

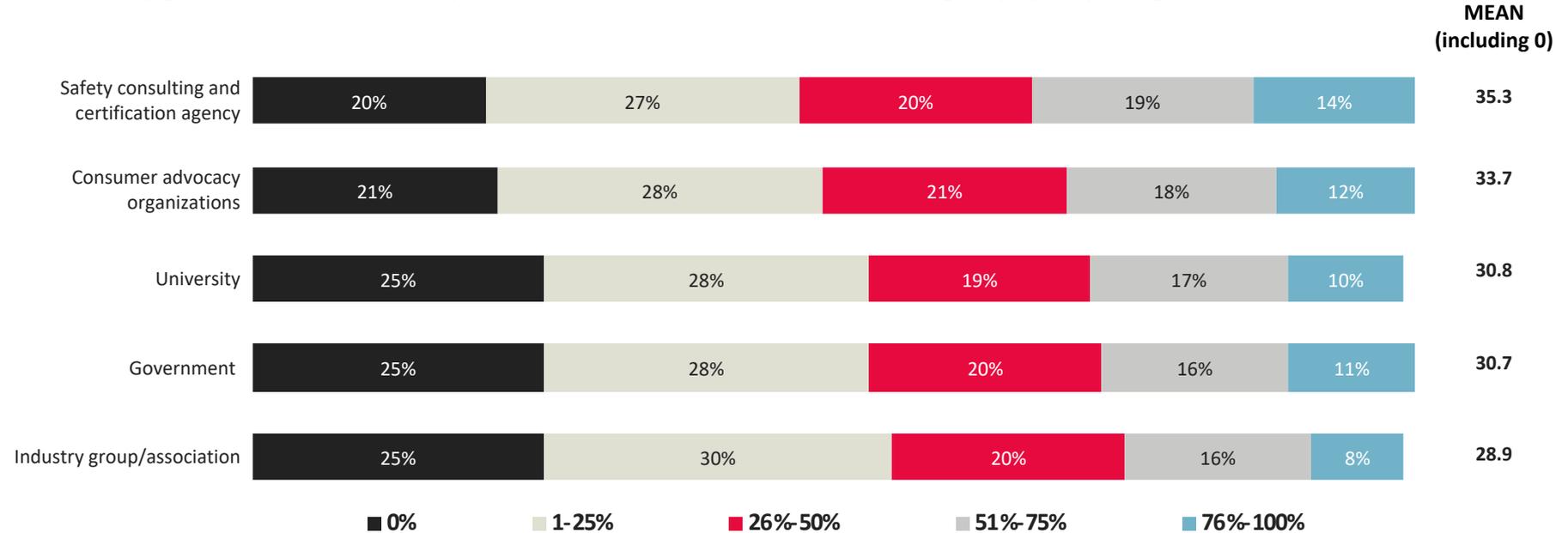


Across all regional economies, as many or more global citizens indicate that they would feel more confident buying a product with a security certification mark, compared to 2018.



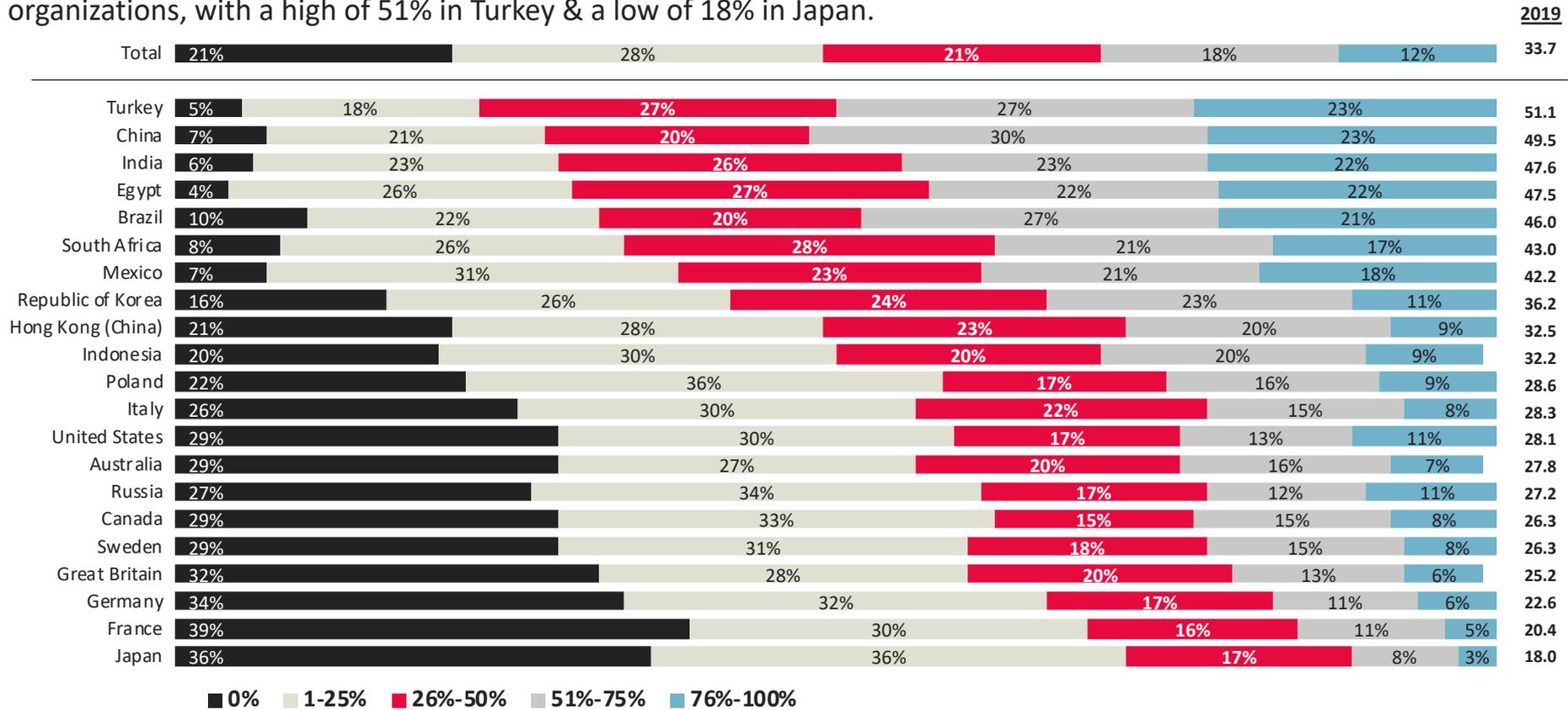
GLOBAL TOTAL

For an equivalent product valued at \$1k, global citizens are willing to pay as much as 35% more for a product with security certification markings from safety consulting & certification agencies, followed closely by consumer advocacy organizations (at 34% more, on average). They're willing to pay slightly less (29% more) if it is certified by an industry group/association. Anywhere from 20% to 25% aren't willing to pay anything more.



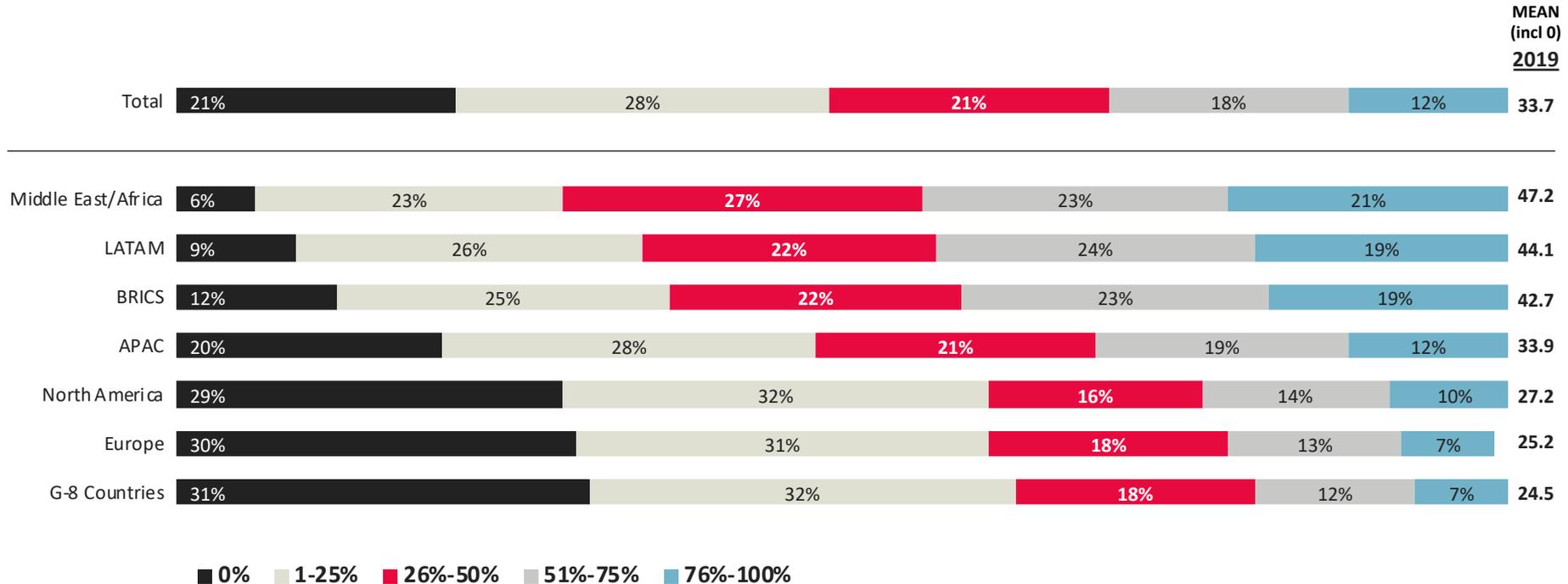
CONSUMER ADVOCACY ORGANIZATIONS

Globally, citizens are willing to pay about 34% more for security certification markings from consumer advocacy organizations, with a high of 51% in Turkey & a low of 18% in Japan.



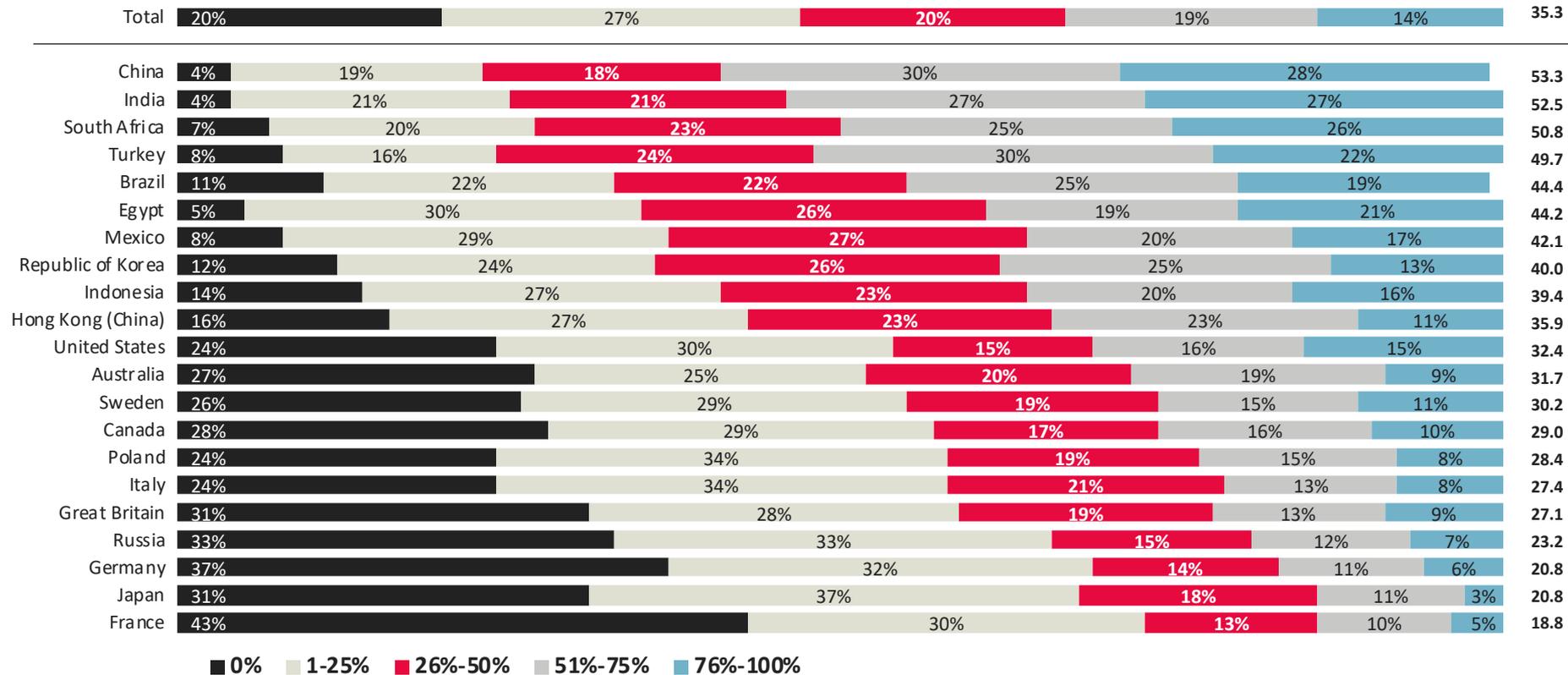
CONSUMER ADVOCACY ORGANIZATIONS

Citizens in the Middle East & Africa are willing to pay almost twice as much, compared to those in the G-8 economies, for security certification markings from consumer advocacy organizations. Two in ten (21%) aren't willing to pay any premium.



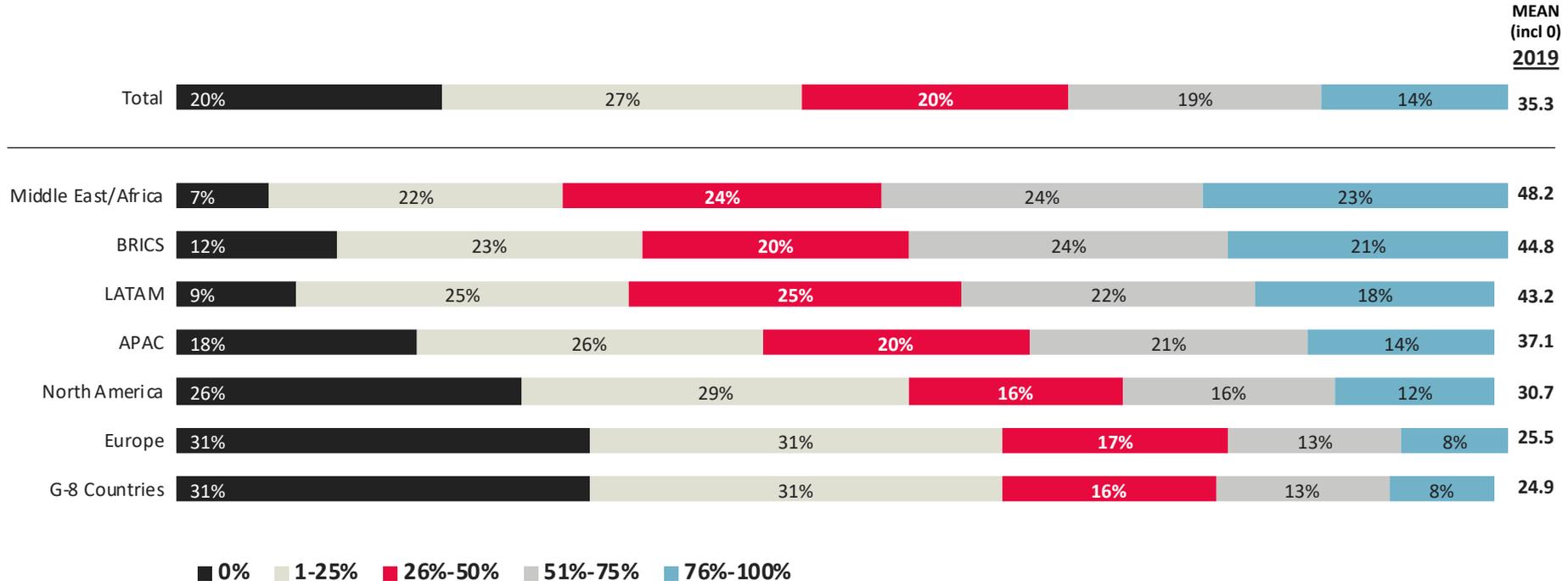
SAFETY CONSULTING AND CERTIFICATION AGENCY

On average, global citizens are willing to pay 35% more to have a product with security certification marks from safety consulting & certification agencies, ranging from highs of 53% in China & India to a low of 19% in France. MEAN (incl 0) 2019



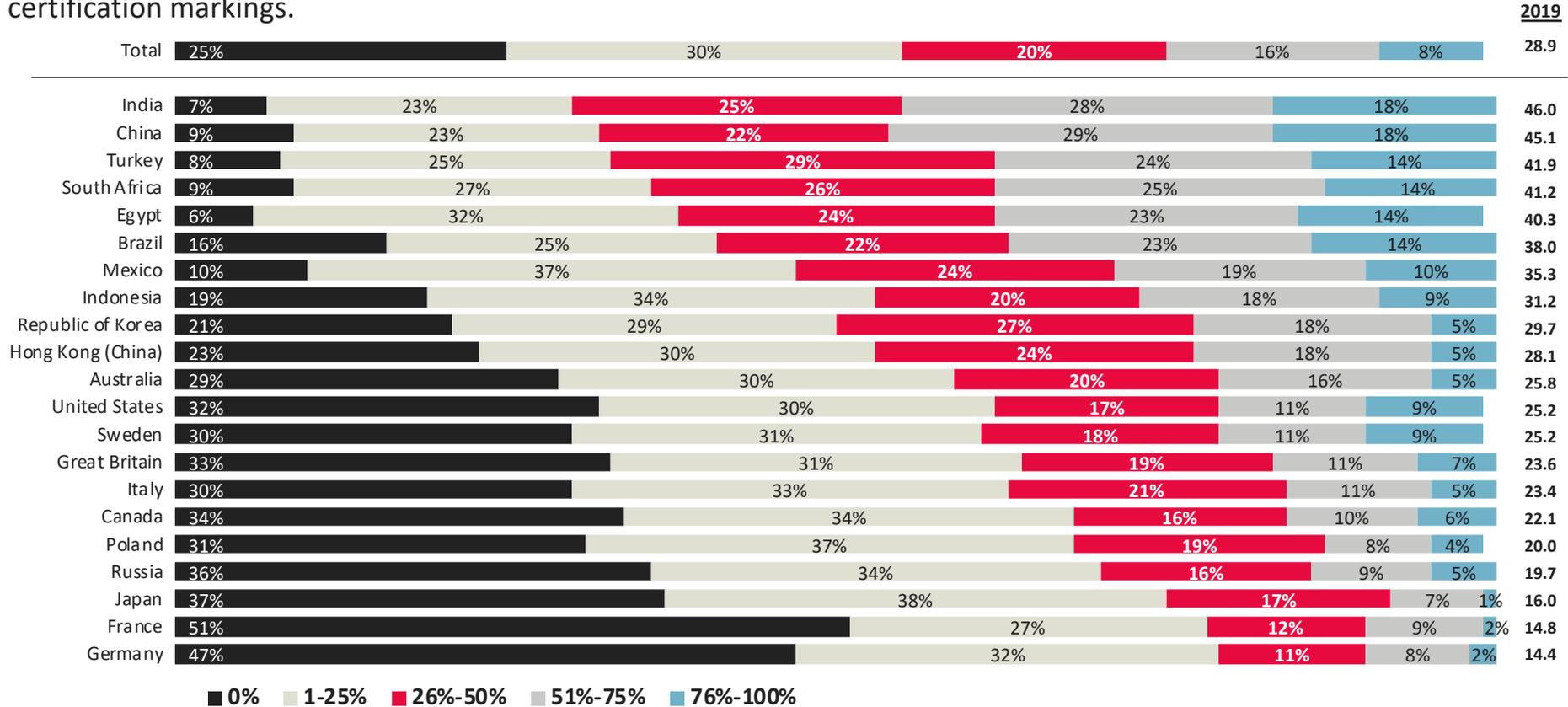
SAFETY CONSULTING AND CERTIFICATION AGENCY

Once again, citizens in the Middle East & Africa are willing to pay a premium of almost twice as much, compared to those in the G-8 economies, for security certification marks from safety consulting & certification agencies. Two in ten (20%) aren't willing to pay anything more.



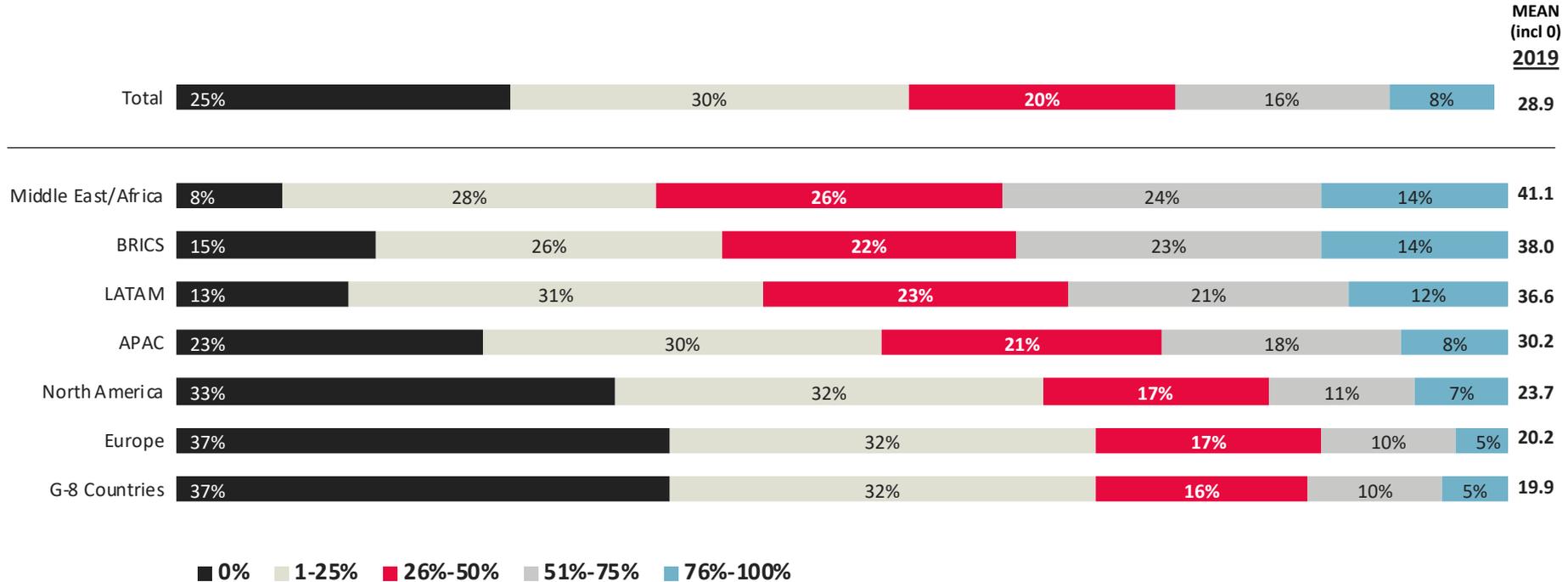
INDUSTRY GROUP/ASSOCIATION

On balance, global citizens are willing to pay 29% more for products with industry group & association security certification markings.



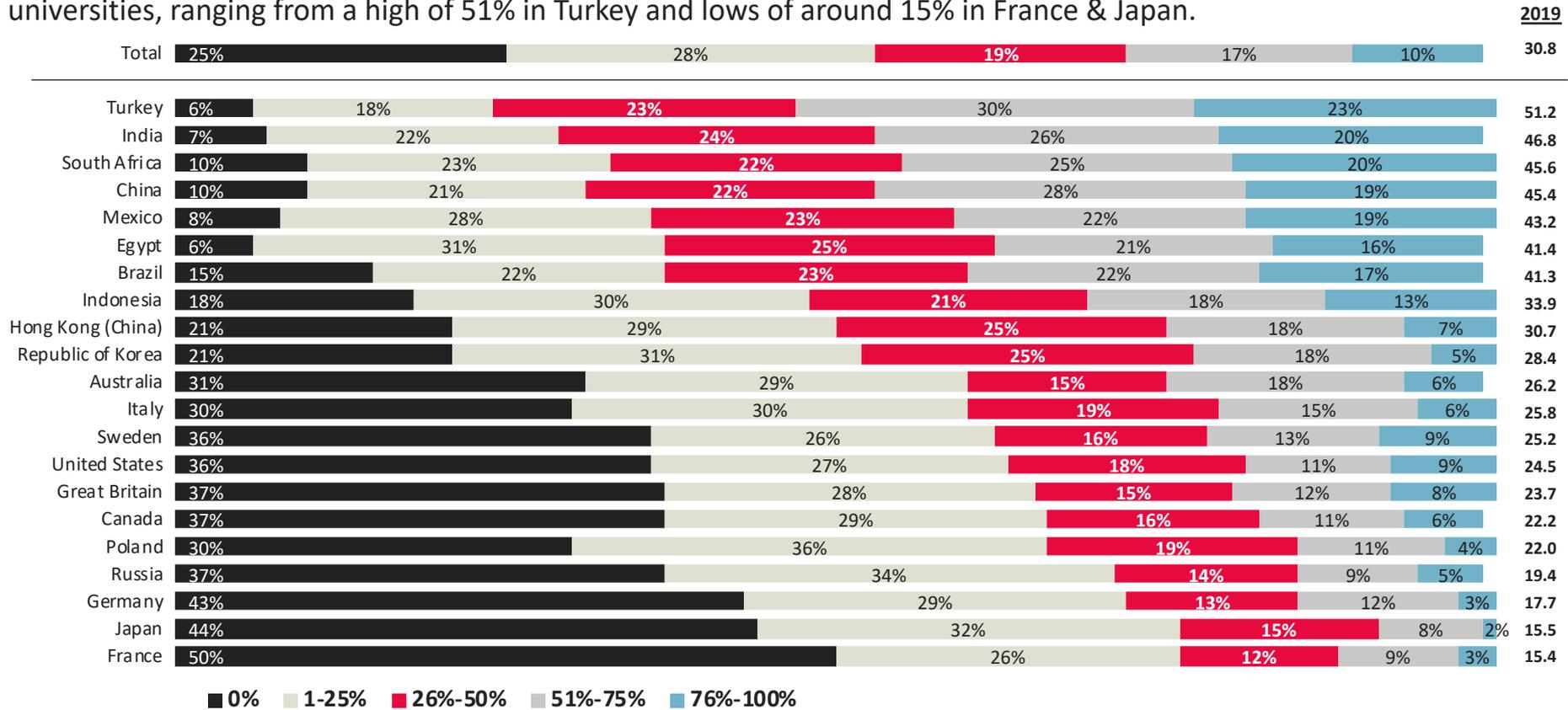
INDUSTRY GROUP/ASSOCIATION

Citizens living in developing economies, most notably the Middle East & Africa, are willing to pay significantly more for products with industry group & association security certification markings. One quarter (25%) aren't willing to pay any premium for certification from an industry association.



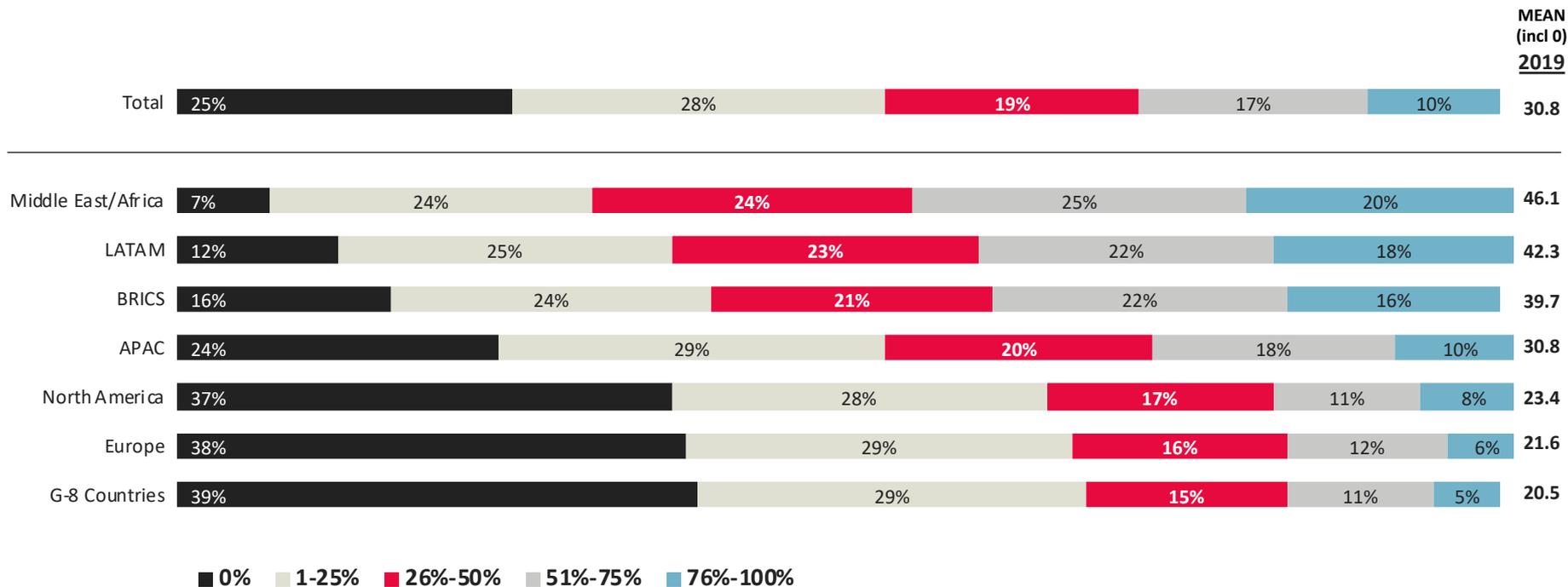
UNIVERSITY

Globally, citizens are willing to pay an average of 31% more for products with security certification markings from universities, ranging from a high of 51% in Turkey and lows of around 15% in France & Japan.



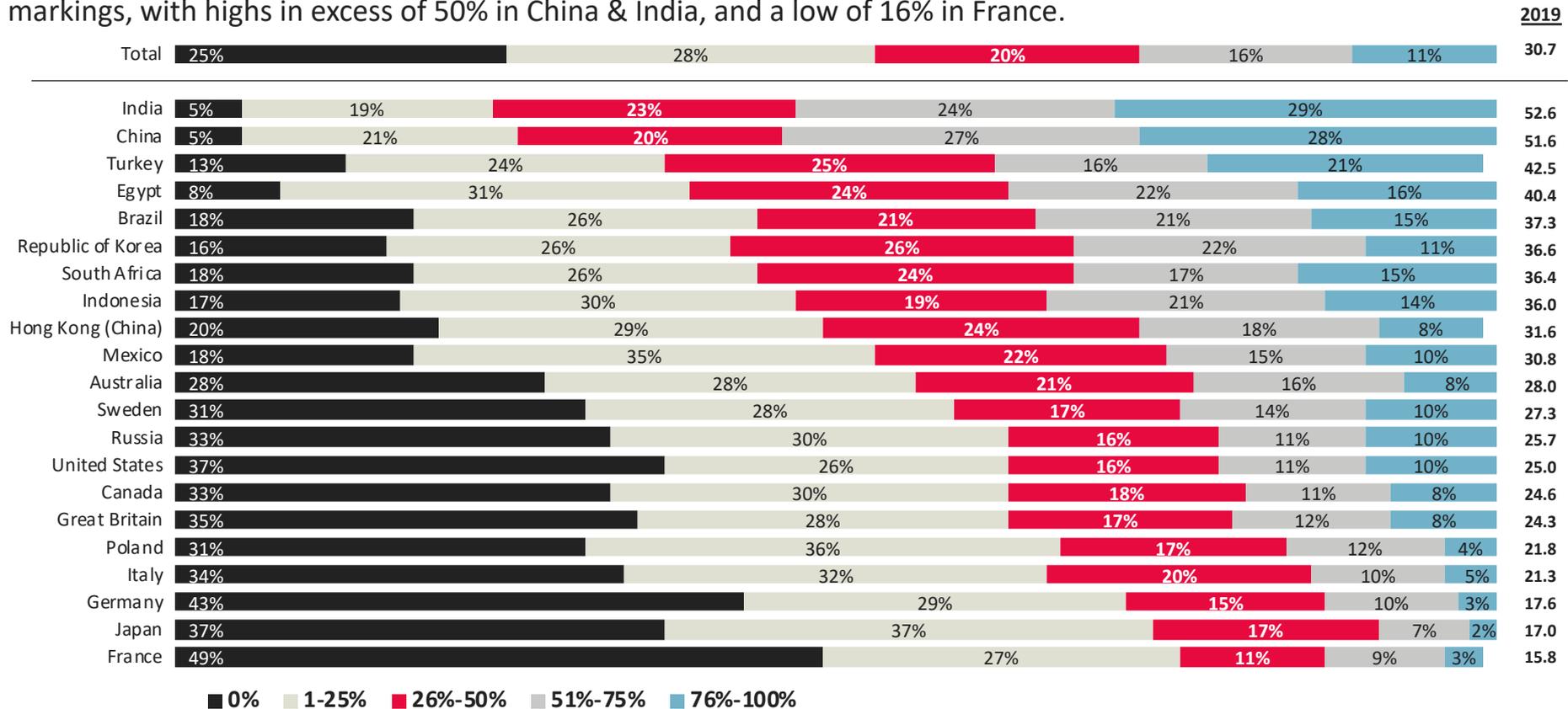
UNIVERSITY

Consistent with other metrics, citizens living in developing economies are more willing to pay extra for products with security certification markings from universities. One in four (25%) respondents isn't willing to pay a premium.



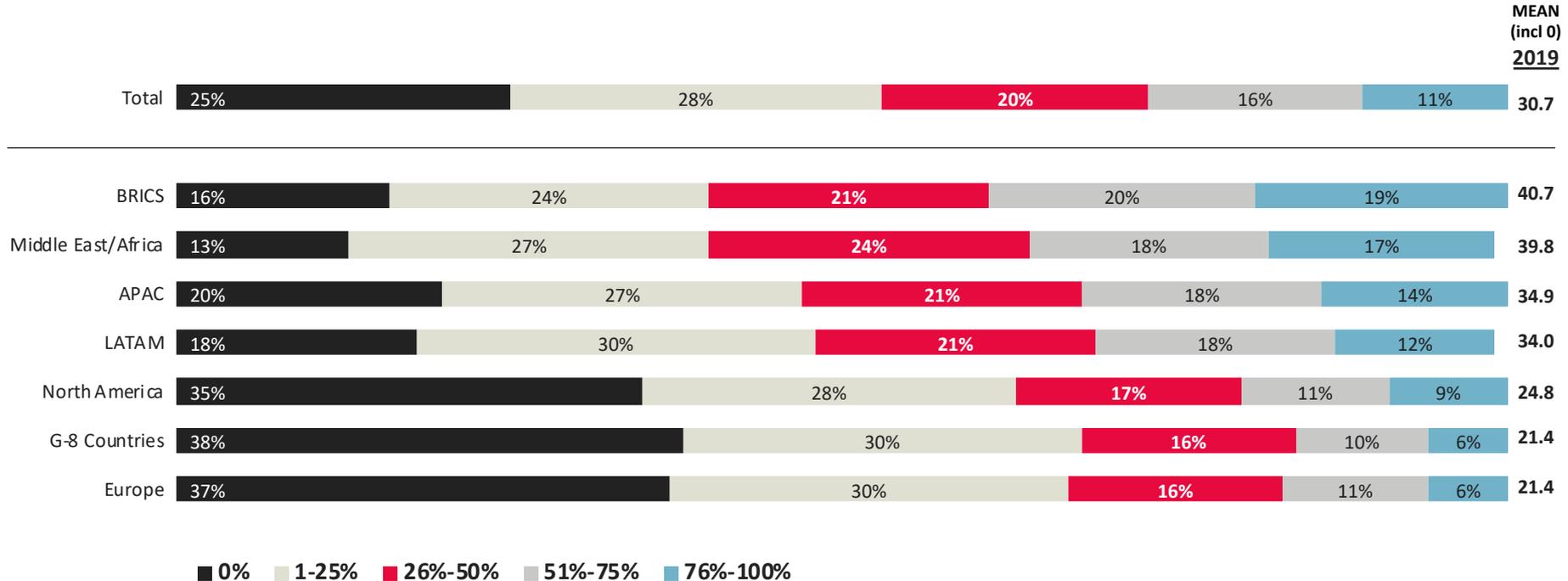
GOVERNMENT

Global citizens are willing to pay an average of 31% more for products with government security certification markings, with highs in excess of 50% in China & India, and a low of 16% in France. MEAN (incl 0)

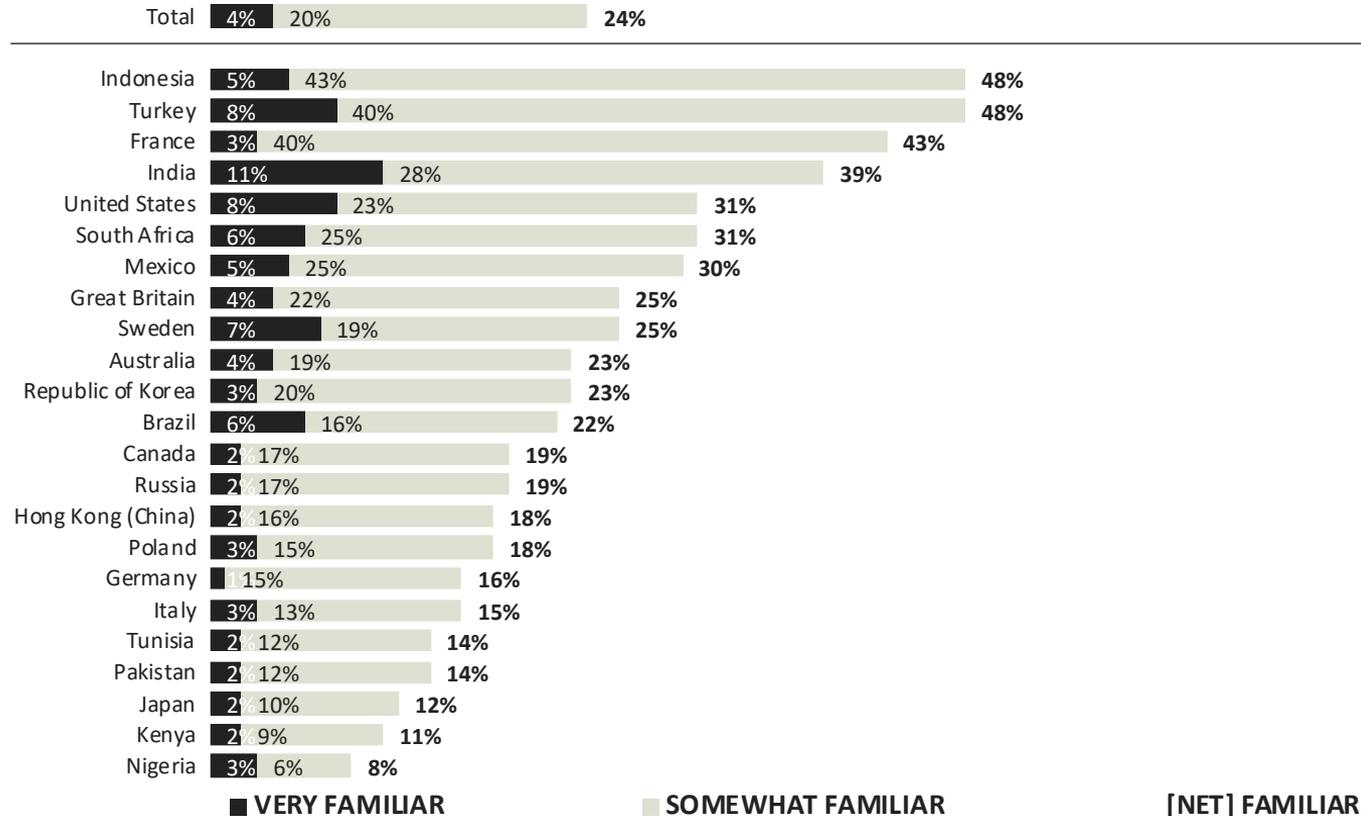


GOVERNMENT

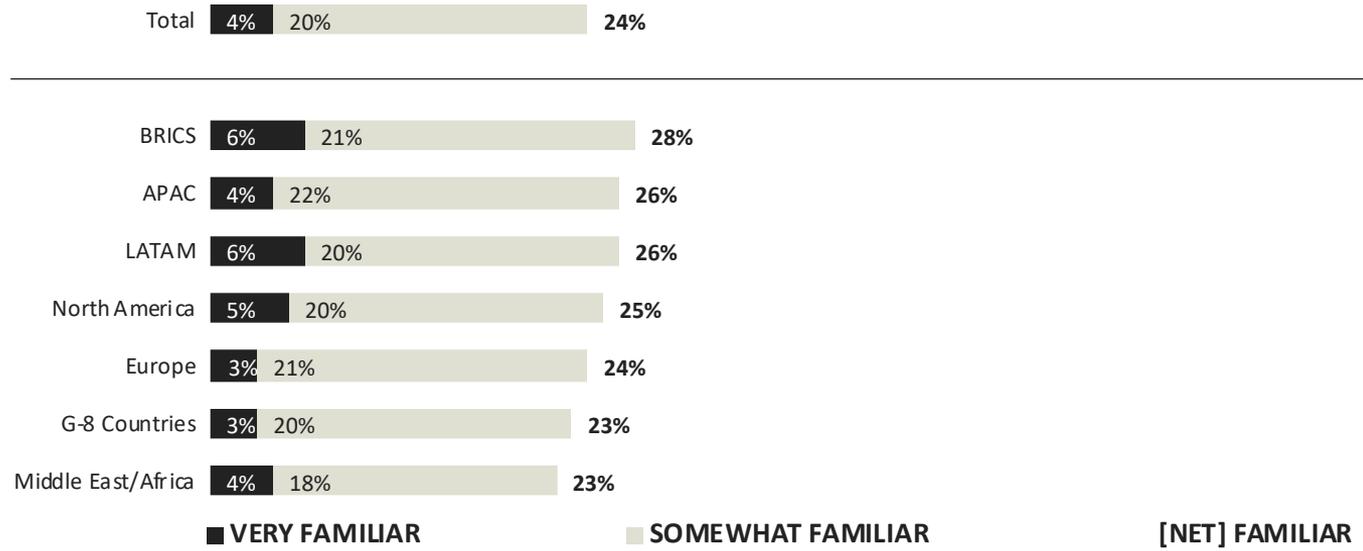
Citizens living in developing economies such as BRICS, the Middle East & Africa are willing to pay about twice as much, compared to those who live in more developed economies such as Europe, North America & the G-8, for products with government security certification markings. One in four (25%) isn't willing to pay anything more.



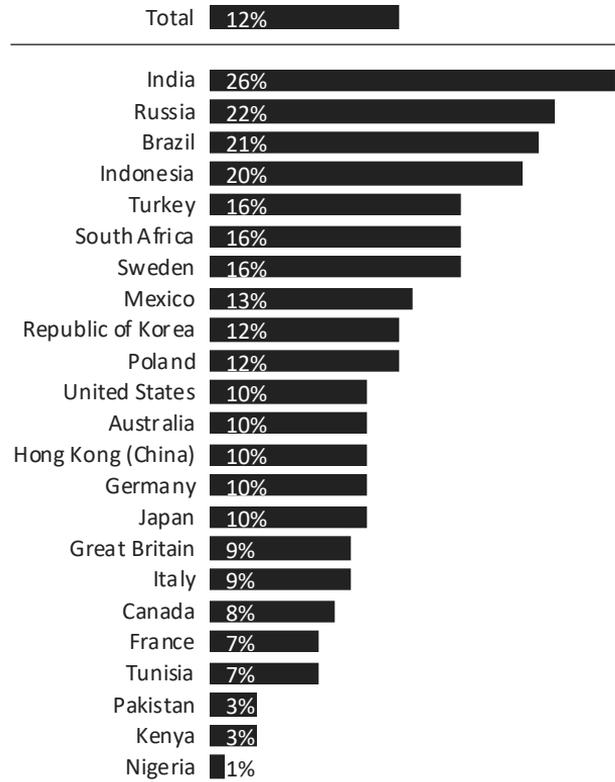
Globally, one in four (24%) are at least *somewhat familiar* with the Dark Web, though just four percent (4%) claim to be *very familiar* with it. Nearly half (48%) of Turkish & Indonesian citizens claim to be familiar with the Dark Web compared to just eight percent (8%) in Nigeria.



There is limited regional variation as only about one in four claim to be at least *somewhat familiar* with the Dark Web, in each region.

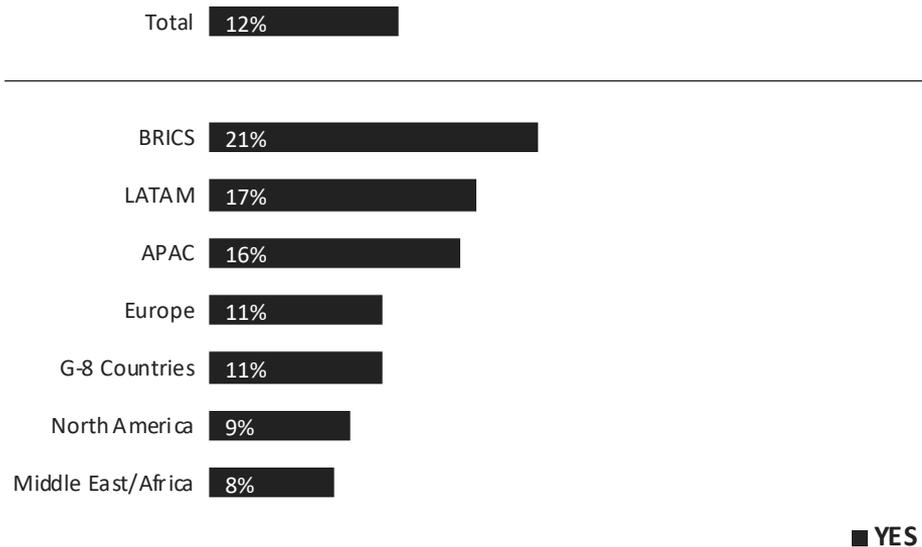


Overall, only one in ten (12%) citizens admit to having used technologies such as Tor, which enable access to the Dark Web, but the incidence appears higher in India, Russia and Brazil than elsewhere.

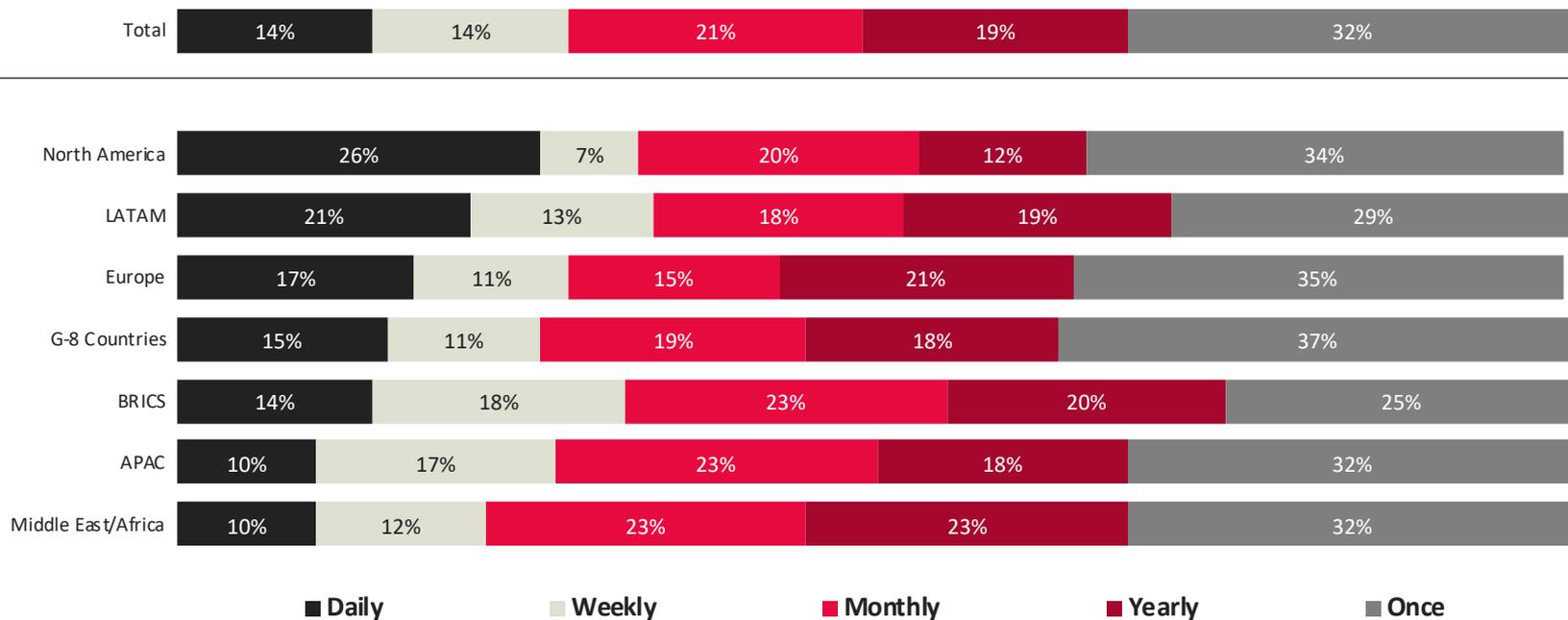


■ YES

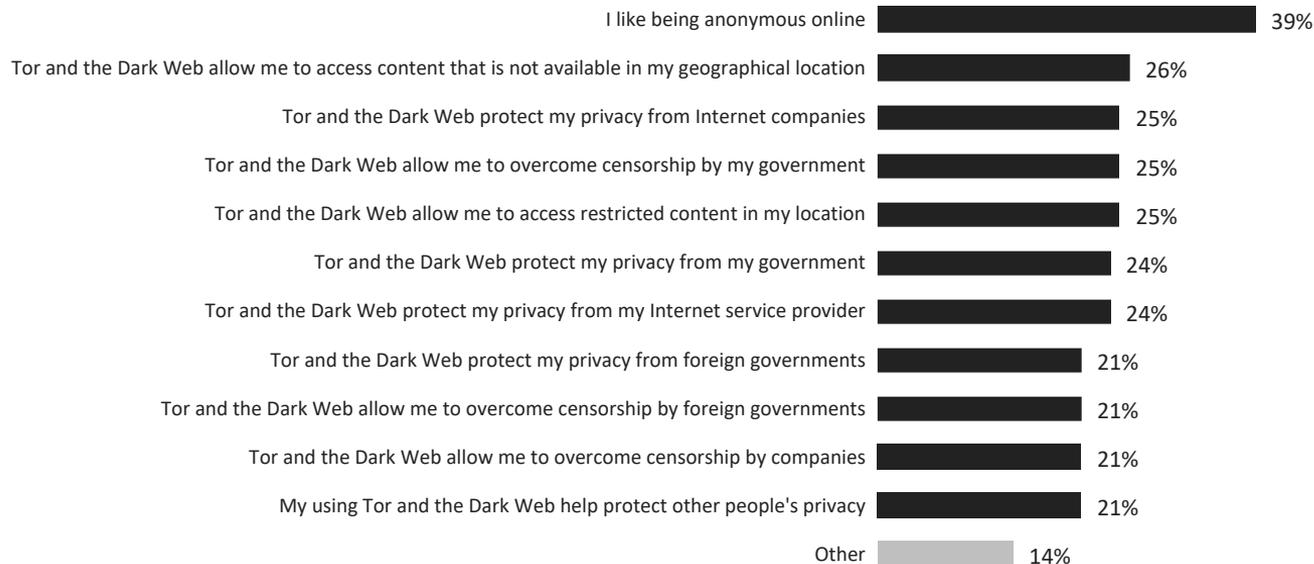
The incidence of Tor usage is highest in the BRICS & LATAM economies.



Among those who use these products, daily usage is more common in the Americas (LATAM & North America) and less common in the APAC, Middle Eastern & African economies.

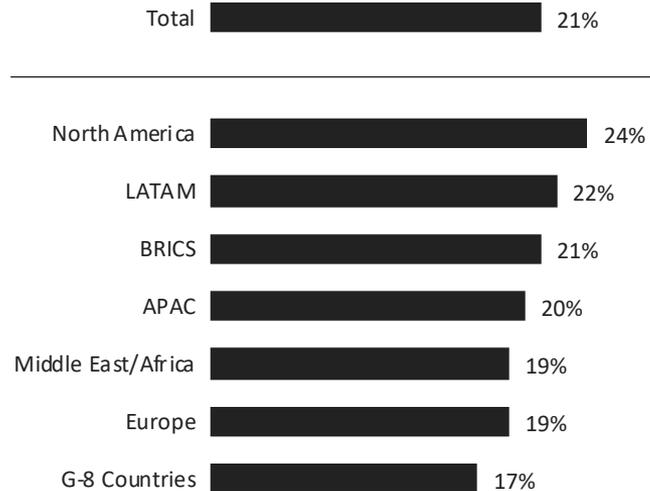


Among those who use Tor & the Dark Web, online anonymity is by far the most commonly cited reason for usage. Other reasons include being able to access content that is normally not available in their location, and their ability to protect their privacy.



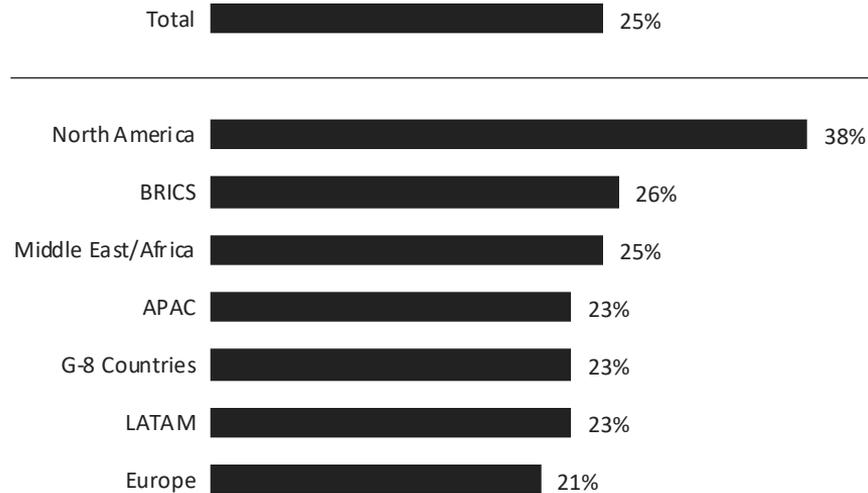
TOR AND THE DARK WEB PROTECT MY PRIVACY FROM FOREIGN GOVERNMENTS

There is limited variation across the regional economies in terms of the incidence of those citing protection against foreign governments as a reason for usage.



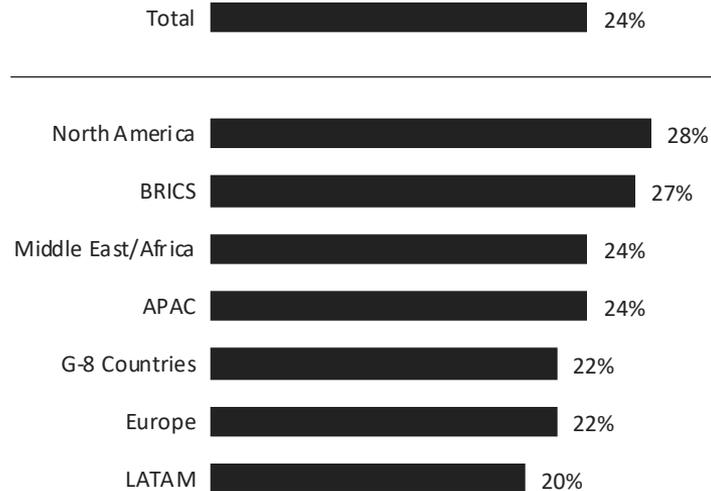
TOR AND THE DARK WEB PROTECT MY PRIVACY FROM INTERNET COMPANIES

North Americans are nearly twice as likely, compared to Europeans, to mention using Tor & the Dark Web as a means for protecting their privacy from Internet companies.



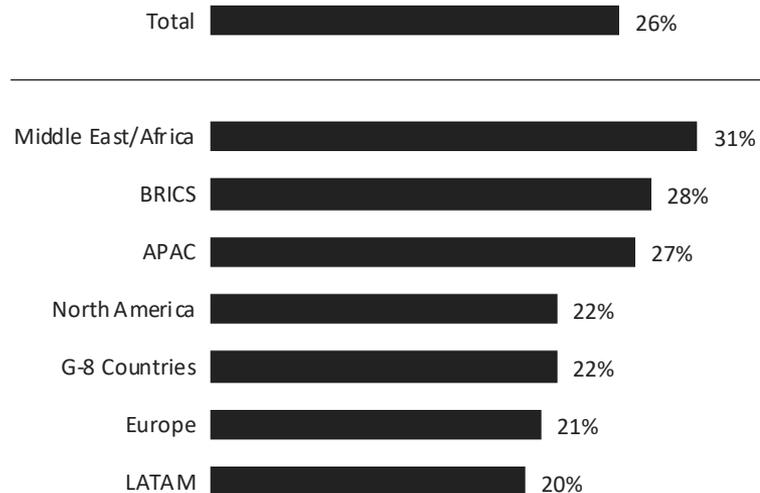
TOR AND THE DARK WEB PROTECT MY PRIVACY FROM MY INTERNET SERVICE PROVIDER

Across all regions, between two & three in ten indicate that they use Tor & the Dark Web as protections against their Internet service provider.



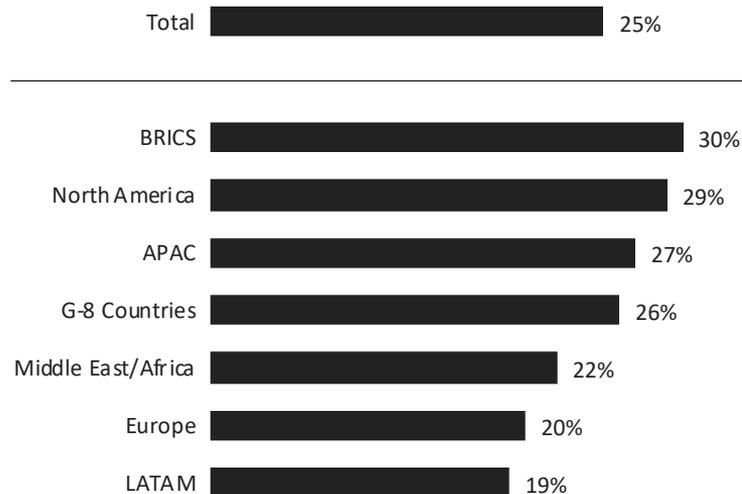
TOR AND THE DARK WEB ALLOW ME TO ACCESS CONTENT THAT IS NOT AVAILABLE IN MY GEOGRAPHICAL LOCATION

Tor & Dark Web users in the Middle East, Africa, BRICS & APAC tend to be a little more likely to use these technologies to access content that is otherwise unavailable in their geographic location.



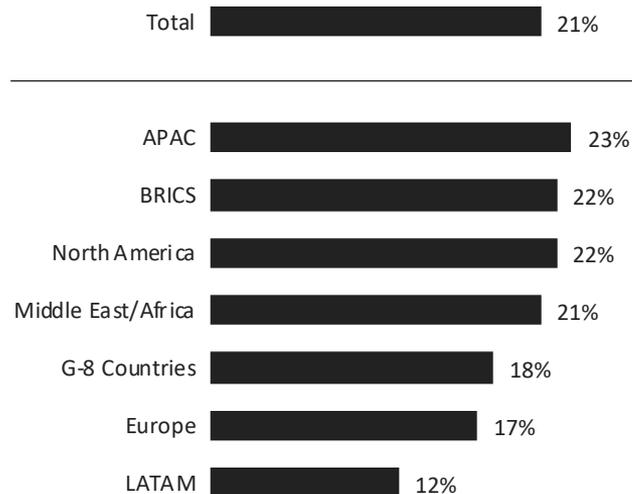
TOR AND THE DARK WEB ALLOW ME TO OVERCOME CENSORSHIP BY MY GOVERNMENT

Tor & Dark Web users living in BRICS, North America, APAC & the G-8 are a little more likely to use this technology to escape Internet censorship from their own governments.



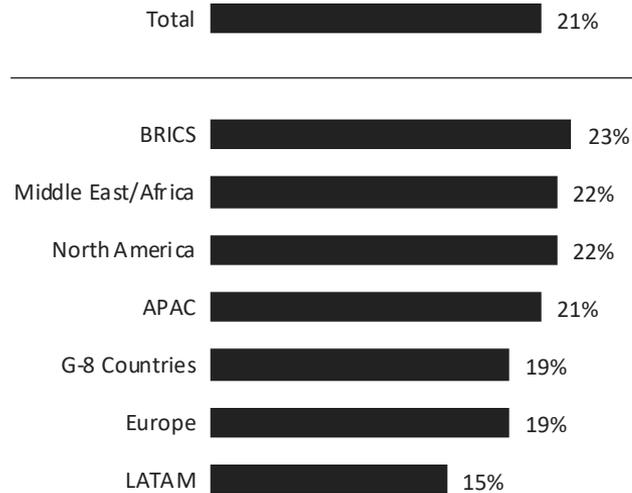
TOR AND THE DARK WEB ALLOW ME TO OVERCOME CENSORSHIP BY FOREIGN GOVERNMENTS

LATAM users are considerably less likely to indicate usage of Tor & the Dark Web as a means of evading censorship by foreign governments.



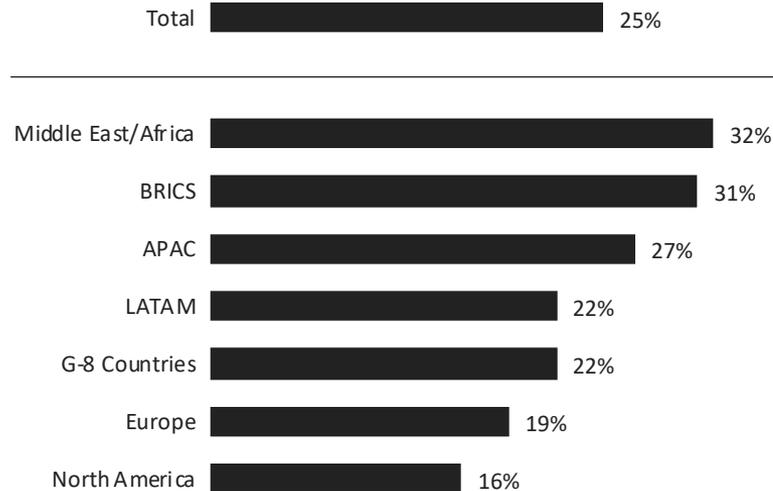
TOR AND THE DARK WEB ALLOW ME TO OVERCOME CENSORSHIP BY COMPANIES

LATAM users are a little less likely to cite overcoming corporate censorship as a reason for their Tor & Dark Web usage.



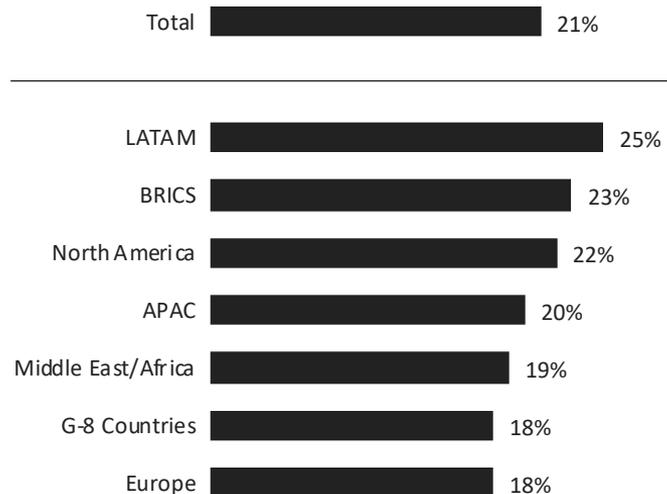
TOR AND THE DARK WEB ALLOW ME TO ACCESS RESTRICTED CONTENT IN MY LOCATION

Users in BRICS, the Middle East & Africa are nearly twice as likely, compared to North American users, to cite accessing restricted content in their location as one of the main reasons for using Tor & Dark Web technologies.



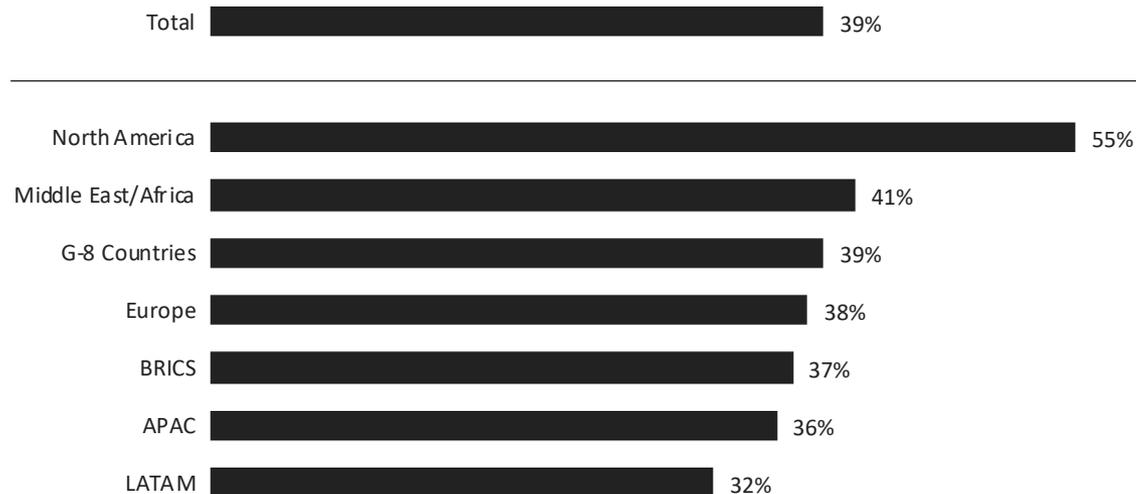
MY USING TOR AND THE DARK WEB HELP PROTECT OTHER PEOPLE'S PRIVACY

There is limited regional variation on this metric, as between one in five & one in four claim to use Tor & the Dark Web to help protect other people's privacy, across all regions.



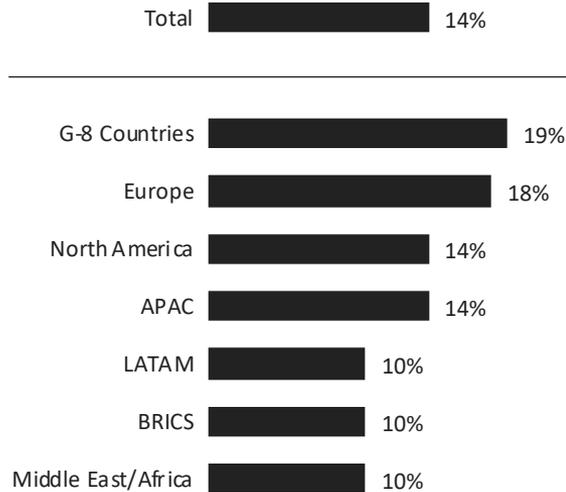
I LIKE BEING ANONYMOUS ONLINE

Over half (55%) of North American users use the technology to remain anonymous online compared to just one in three (32%) LATAM users.

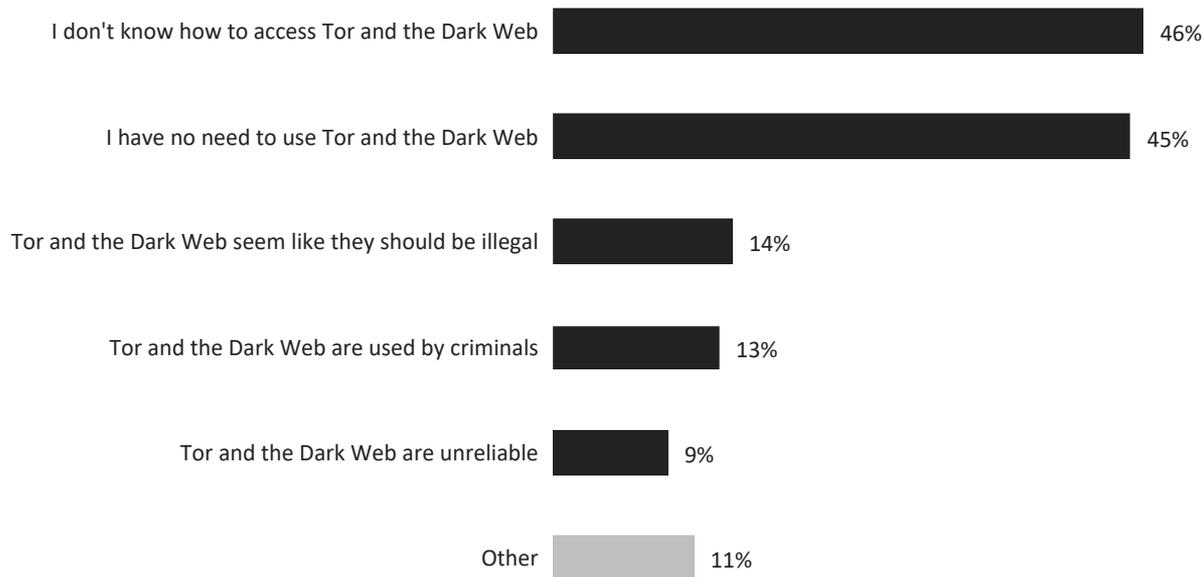


OTHER

European & G-8 users of Tor & the Dark Web are twice as likely to provide some other response, compared to those in the developing economies of BRICS, LATAM, the Middle East & Africa.

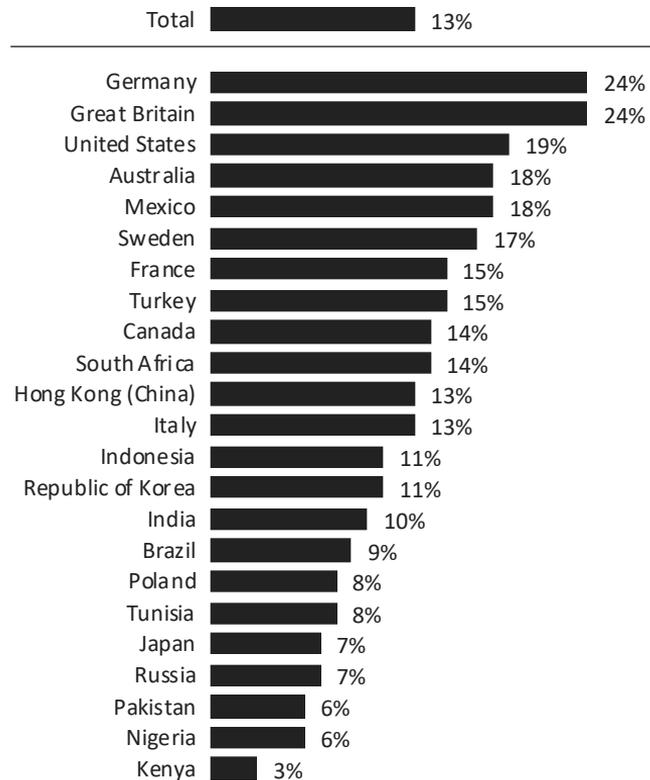


Nearly half of those who do not use technologies such as Tor to access the Dark Web say that it is because they either don't know how (46%) or have no reason to (45%). One in ten (9%) view the technologies as unreliable. Few appear to be concerned about perceptions that it is used by criminals (13%) or should be illegal (14%).



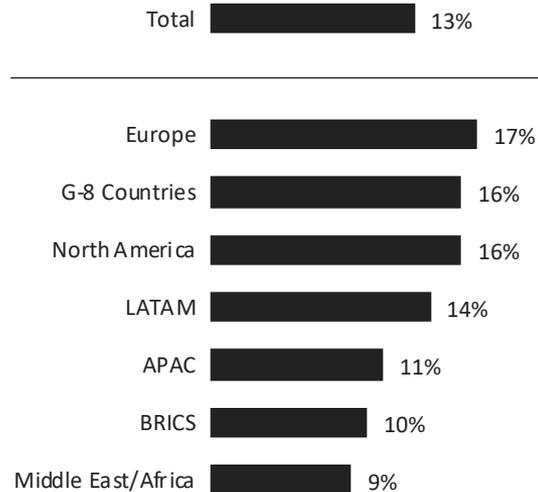
TOR AND THE DARK WEB ARE USED BY CRIMINALS

Just thirteen percent (13%) do not use Tor & other Dark Web technologies because they think these technologies are used by criminals, including as many as one in four (24%) in Germany & Great Britain.



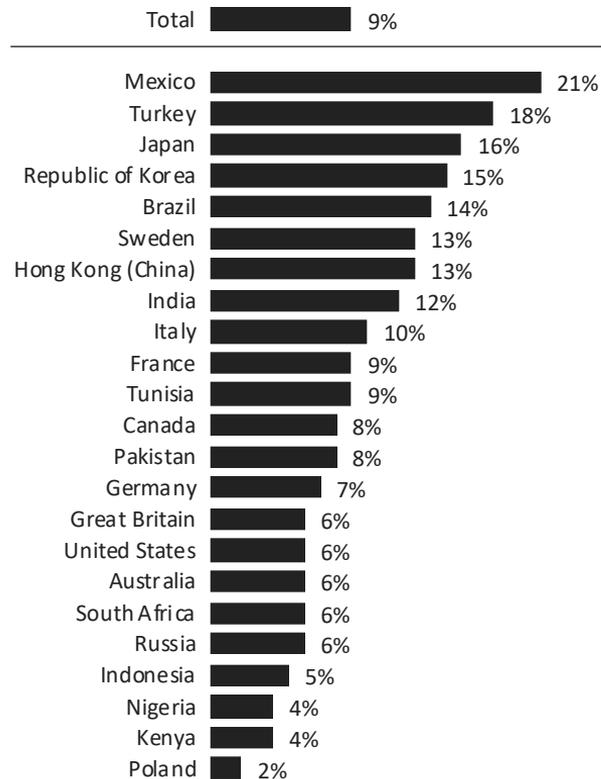
TOR AND THE DARK WEB ARE USED BY CRIMINALS

Non-users in developing economies tend to be less likely to say that they are not using Tor & the Dark Web because they perceive them as being technologies that are used by criminals.



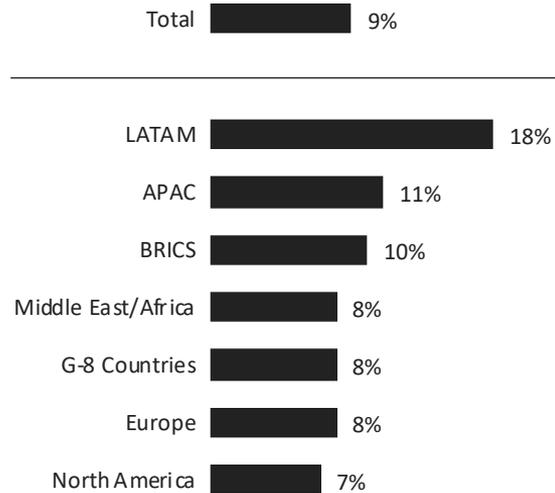
TOR AND THE DARK WEB ARE UNRELIABLE

One in ten (9%) non-users say that they are not using the technology because they feel as though it is unreliable, with a high of twenty-one percent (21%) in Mexico & a low of just two percent (2%) in Poland.



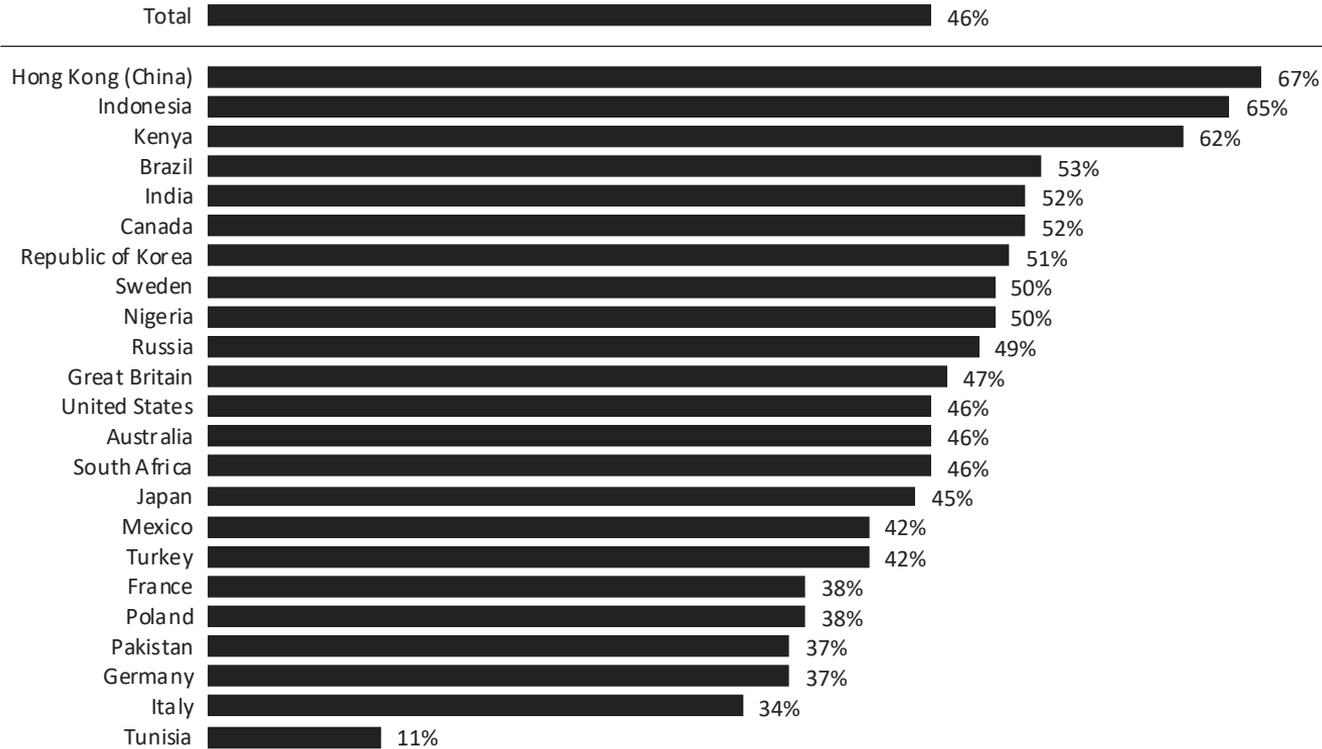
TOR AND THE DARK WEB ARE UNRELIABLE

Non-users in the LATAM region are twice as likely, compared to the global average, to cite a lack of reliability as a reason for not utilizing technologies such as Tor & the Dark Web.



I DON'T KNOW HOW TO ACCESS TOR AND THE DARK WEB

Almost half (46%) of non-users admit that they are not sure how to access Tor & the Dark Web.



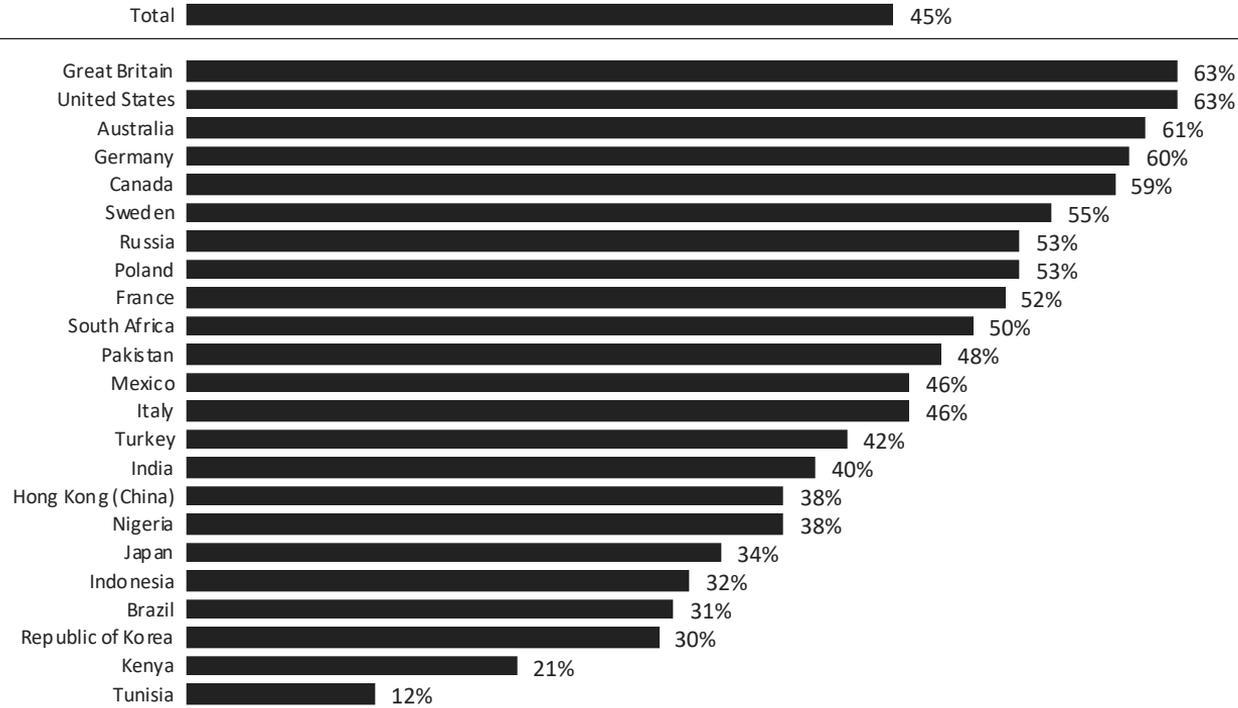
I DON'T KNOW HOW TO ACCESS TOR AND THE DARK WEB

A majority (54%) of non-users in the APAC region do not know how to access Tor & the Dark Web compared to just two in five (40%) Europeans.



I HAVE NO NEED TO USE TOR AND THE DARK WEB

Nearly half (45%) of non-users mention that they are not making use of the technology because they have no reason to, including majorities in most of the developed economies of the world.



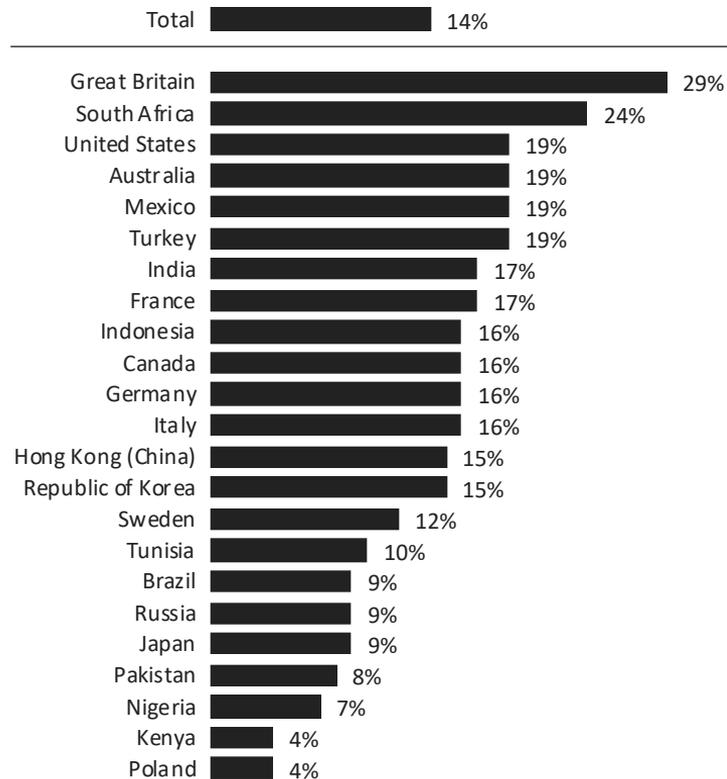
I HAVE NO NEED TO USE TOR AND THE DARK WEB

Over half of non-users in North America (61%), Europe (55%), and the G-8 (54%) more generally indicate that they have no reason to use Tor & the Dark Web.



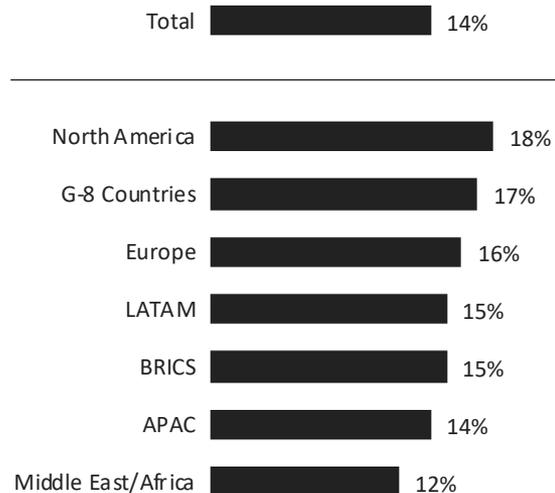
TOR AND THE DARK WEB SEEM LIKE THEY SHOULD BE ILLEGAL

Just fourteen percent (14%) of non-users think that Tor & the Dark Web seem illegal, with a high of 29% in Great Britain and lows of 4% in Kenya & Poland.



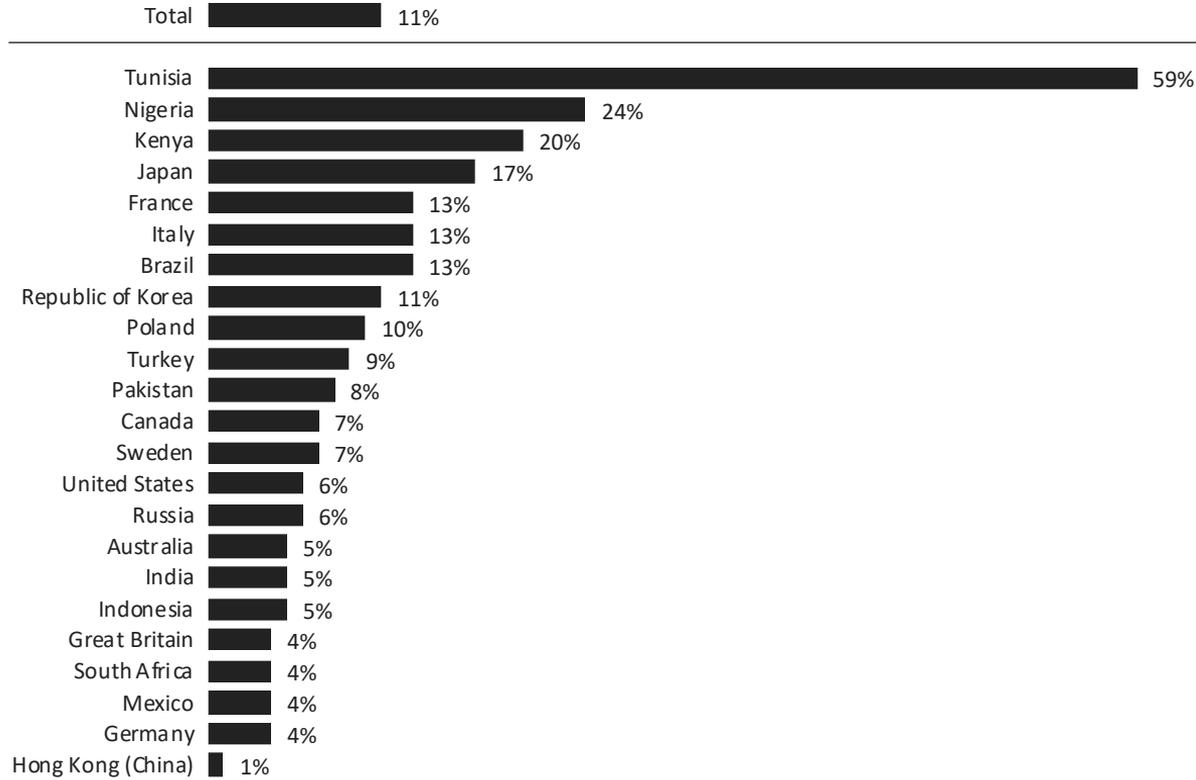
TOR AND THE DARK WEB SEEM LIKE THEY SHOULD BE ILLEGAL

There is limited regional variation in opinion, as between one & two in ten across all regions think that Tor & the Dark Web seem like they should be illegal.



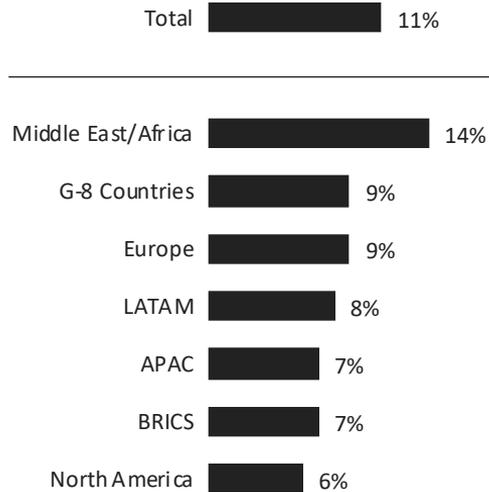
OTHER

Only 11% of non-users offer some other response, when asked why they do not use technologies such as Tor to access the Dark Web.



OTHER

Non-users in the Middle Eastern & African economies are much more likely to provide some other response, relative to all other regions, when asked why they don't use technologies such as Tor & the Dark Web.

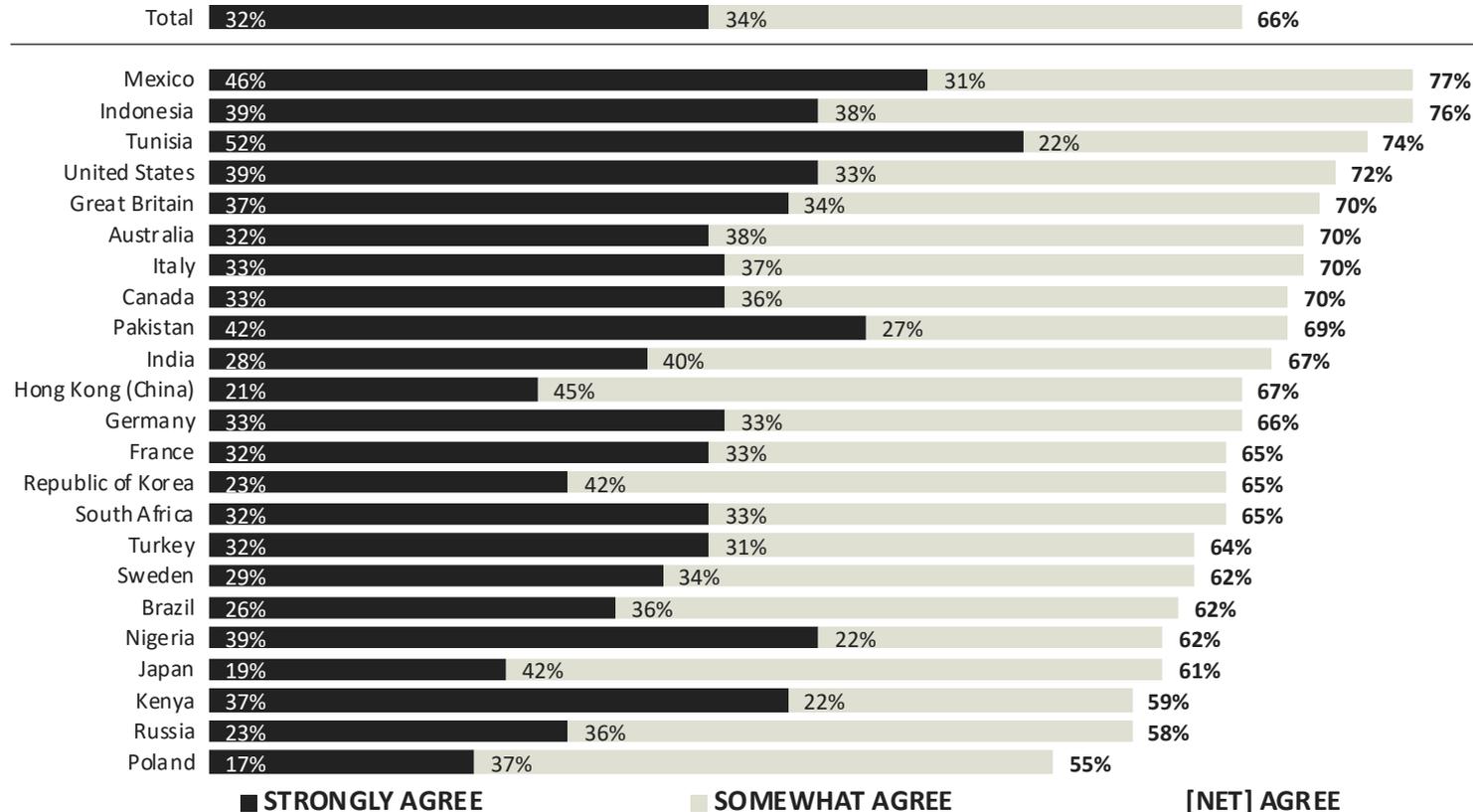




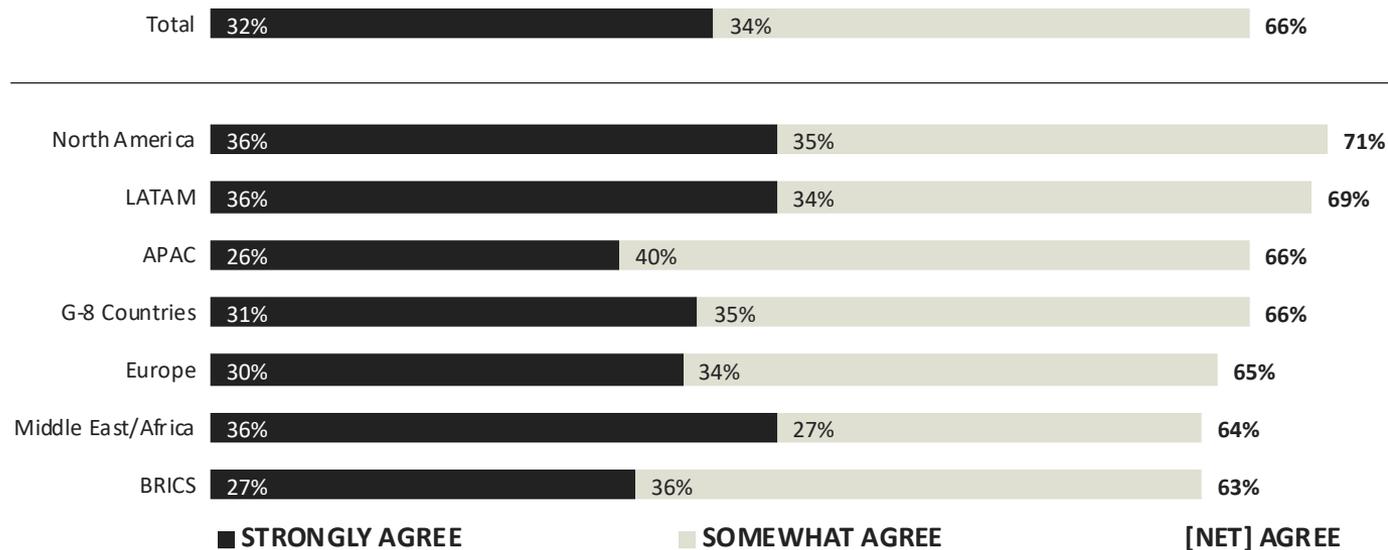
A part of the Internet known as the "Dark Web" is only accessible via special web browsers that allow you to surf the web anonymously.

Journalists, human rights activists, dissidents and whistleblowers can use these services to rally against repression, exercise their fundamental rights to free expression and shed light upon corruption. At the same time, hackers, illegal marketplaces (e.g. selling weapons and narcotics), and child abuse sites can also use these services to hide from law enforcement.

Two-thirds (66%) of global citizens *agree* that the Dark Web should be shut down. In fact, a majority in each nation surveyed feel this way including as many as three quarters in Mexico, Indonesia & Tunisia.



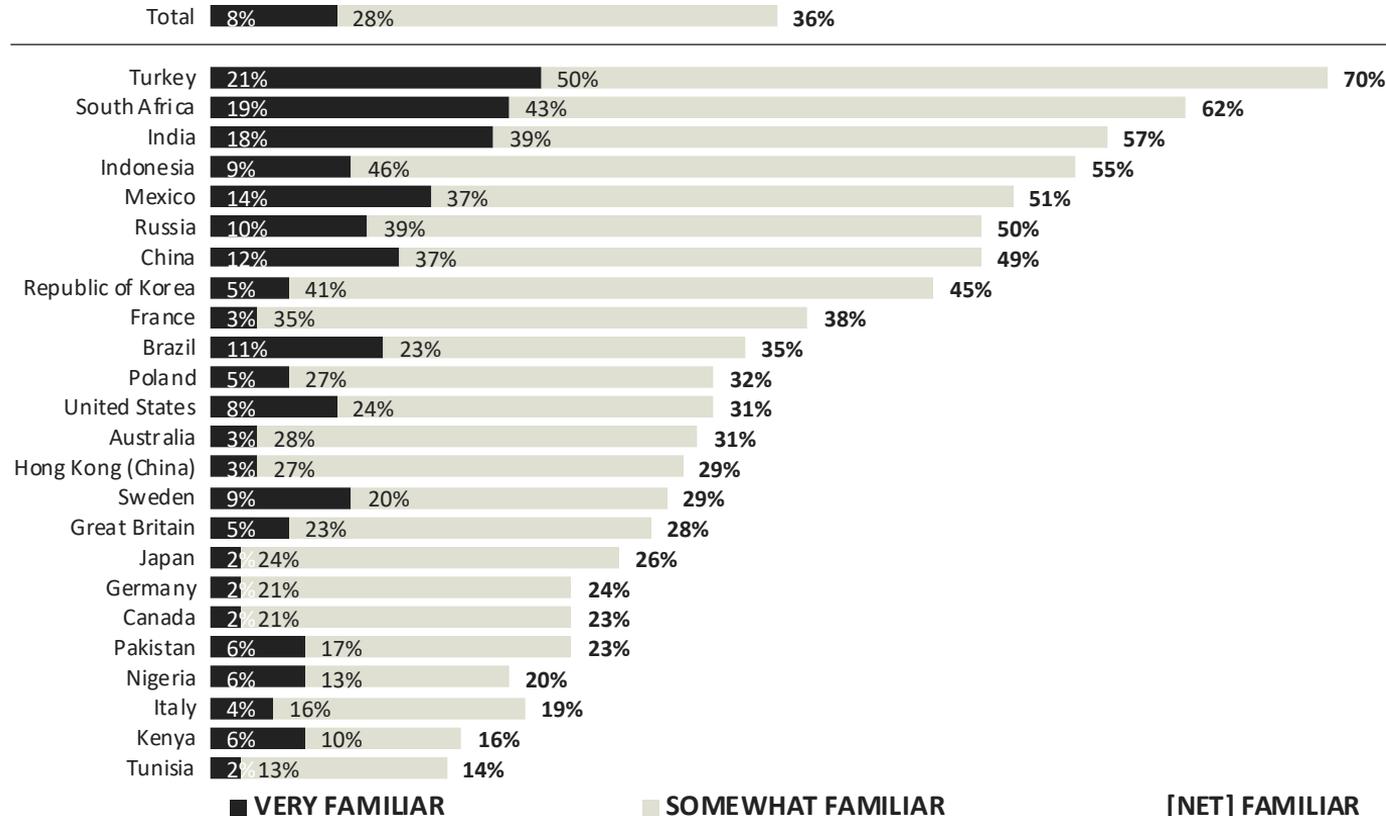
Agreement is strongest in the Americas (LATAM & North America) that the Dark Web needs to be shut down.



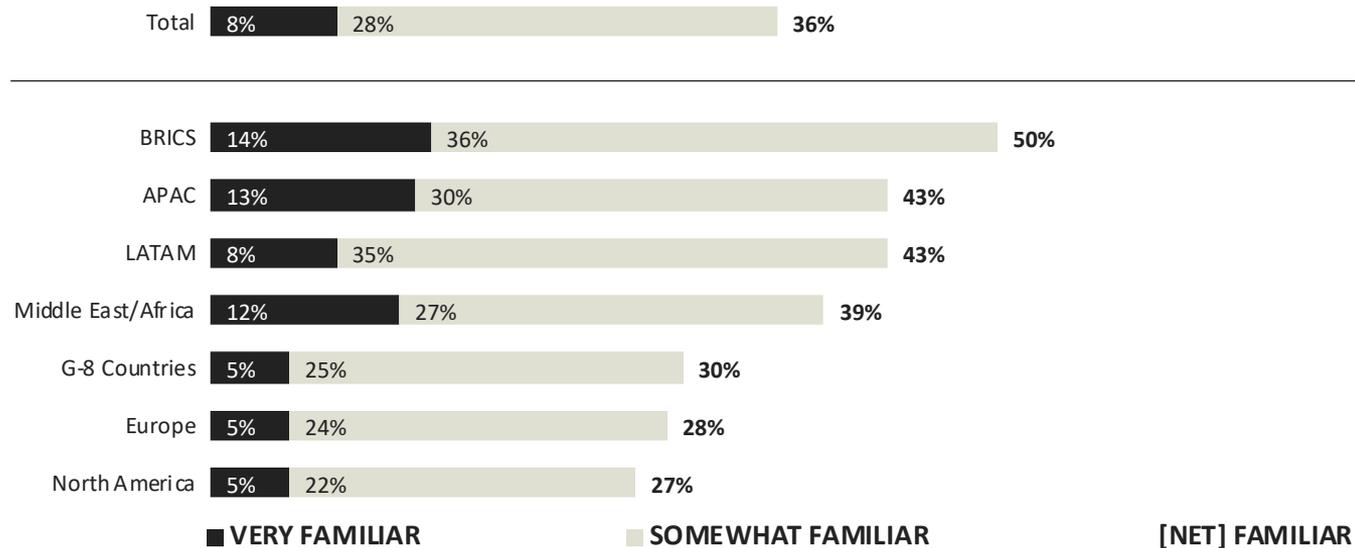


CRYPTOCURRENCES

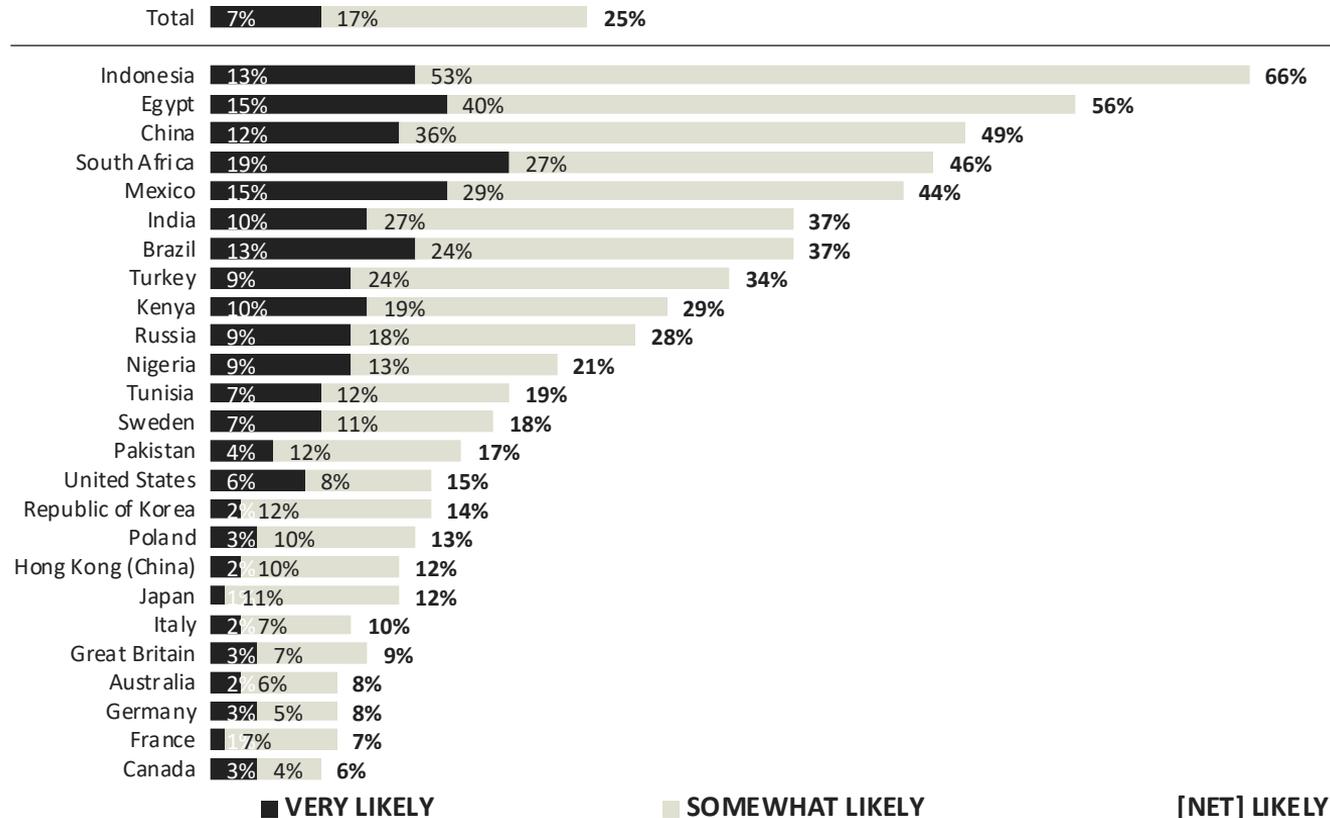
Overall, only about one in three (36%) global citizens are *familiar* with cryptocurrencies, with Turkish citizens by far the most likely to indicate at least some degree of familiarity with this particular currency (at 70%).



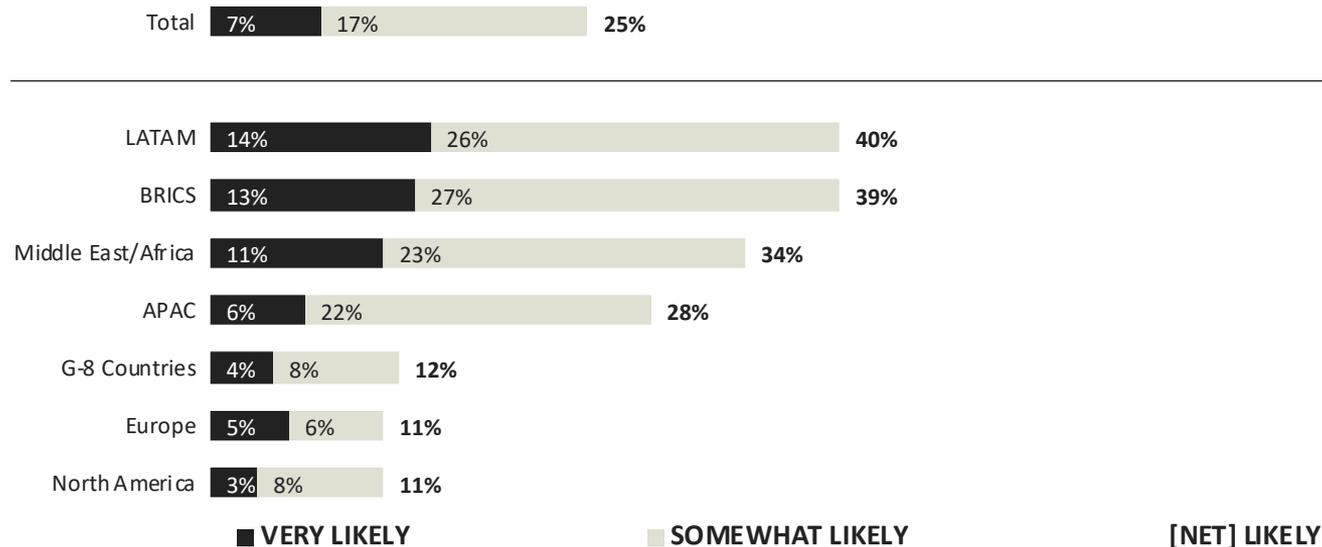
Aside from BRICS, fewer than half in all other regional economies indicate familiarity with cryptocurrencies.



Only about one in four (25%) plan to use or purchase cryptocurrencies within the next year. There is considerable variation, however, as most in Indonesia (66%) & Egypt (56%) plan on doing this compared to just one in ten, or fewer, in Canada, France, Australia, Germany, Great Britain & Italy.



Developing economies, such as LATAM & BRICS are around four times as likely, compared to developed economies such as Europe, North America & the G-8 more generally, to indicate that they are likely to use or purchase cryptocurrencies in the next year.

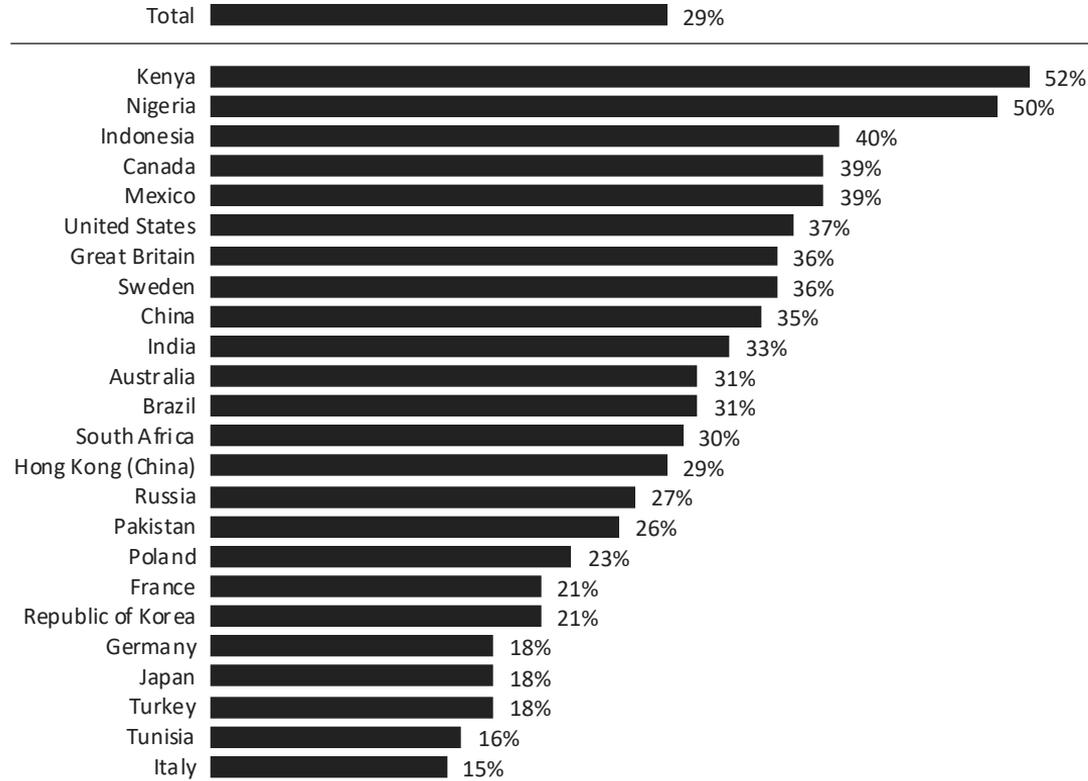


Instability, insecurity, & a lack of access are the most commonly cited reasons for not planning on purchasing or using cryptocurrencies, within the next year.



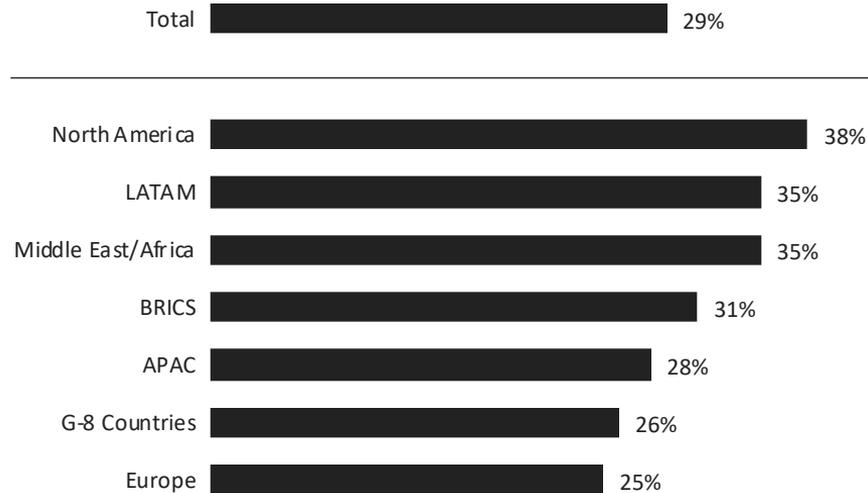
I DON'T KNOW HOW TO GET CRYPTOCURRENCIES

Three in ten (29%) who are unlikely to use cryptocurrencies say it is because they are not sure how to get them, including a majority in Kenya (52%).



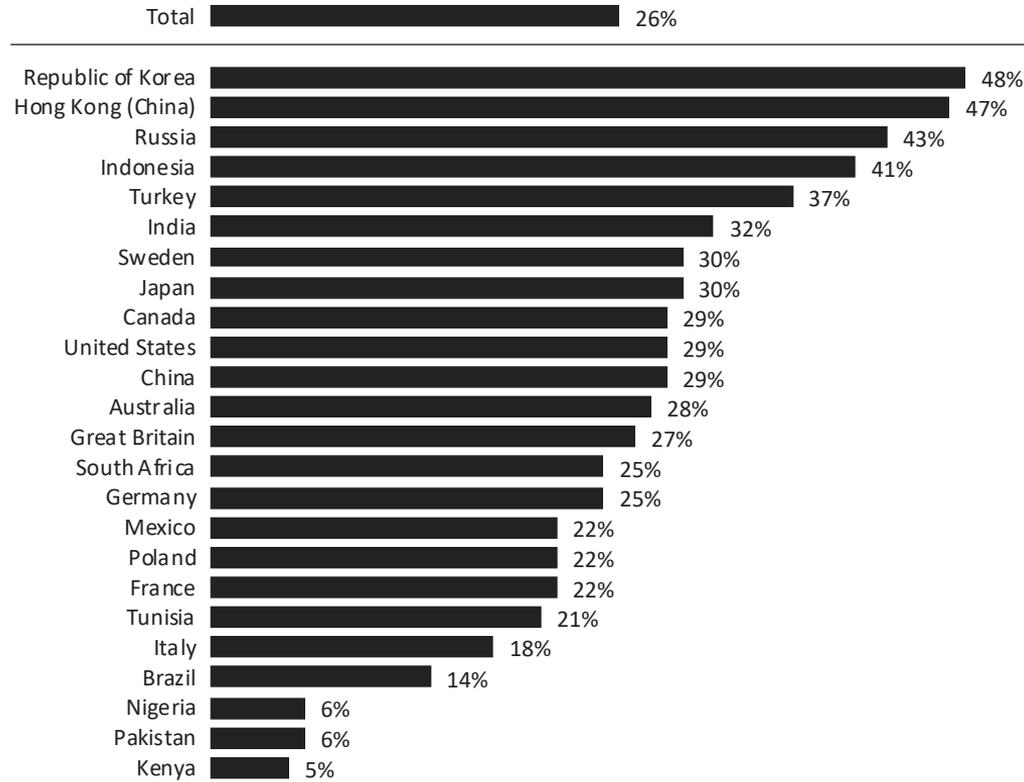
I DON'T KNOW HOW TO GET CRYPTOCURRENCIES

Among those who are unlikely to use cryptocurrencies, North Americans are much more likely (at 38%), relative to the global average, to indicate that they are not sure how to get them.



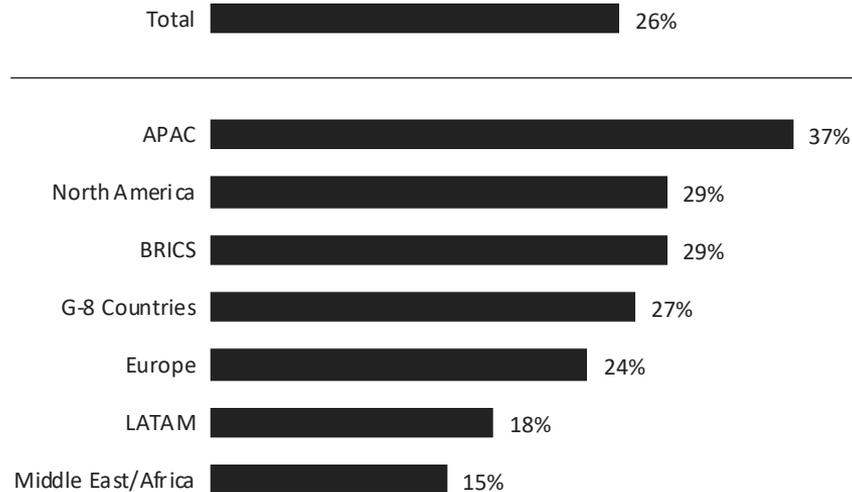
CRYPTOCURRENCIES ARE TOO INSECURE, TRADITIONAL FINANCIAL INSTITUTIONS ARE SAFER

One quarter (26%) of those who are unlikely to purchase cryptocurrencies cite a lack of security as a reason for not using them, including nearly half in the Republic of Korea (48%) & Hong Kong (China) (47%).



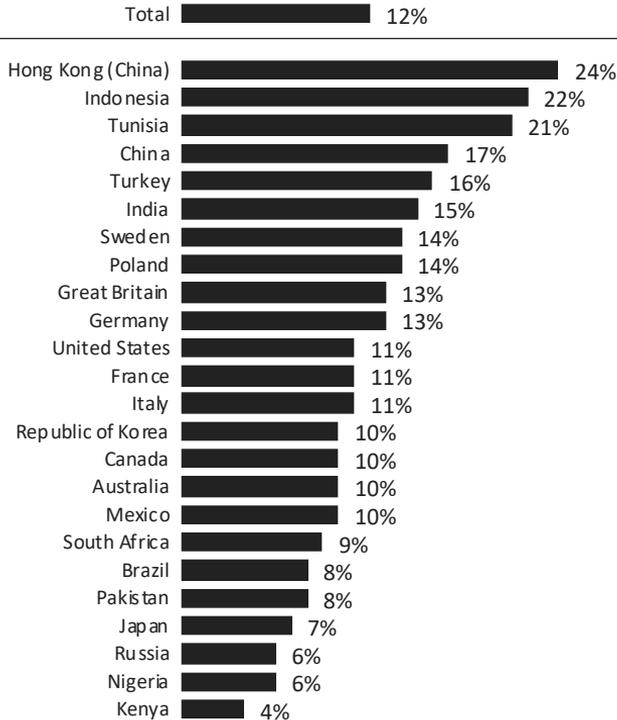
CRYPTOCURRENCIES ARE TOO INSECURE, TRADITIONAL FINANCIAL INSTITUTIONS ARE SAFER

Those in the APAC economies are more than twice as likely compared to their counterparts in the Middle East & Africa to cite a lack of security as a reason for being unlikely to use cryptocurrencies.



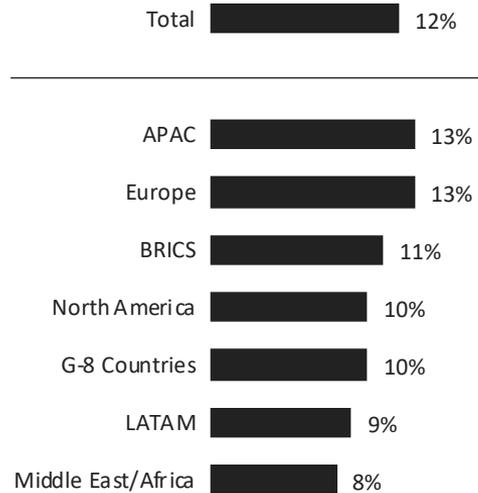
CRYPTOCURRENCIES ARE USED BY CRIMINALS AND I DON'T WANT TO BE ASSOCIATED WITH THEM

Just twelve percent (12%) say they won't use cryptocurrencies because they associate them with criminals & criminal activity. There is some regional variation, with this response being cited most frequently in Hong Kong (China) (24%) & least frequently in Kenya (4%).



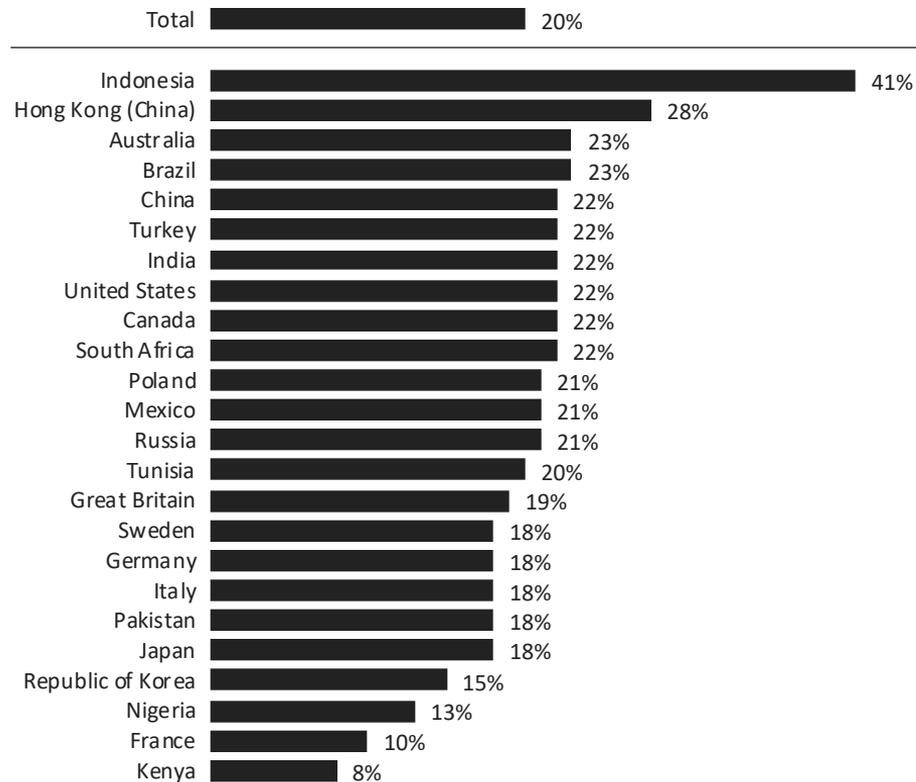
CRYPTOCURRENCIES ARE USED BY CRIMINALS AND I DON'T WANT TO BE ASSOCIATED WITH THEM

There is limited regional variation in terms of the association between cryptocurrencies & criminal activity.



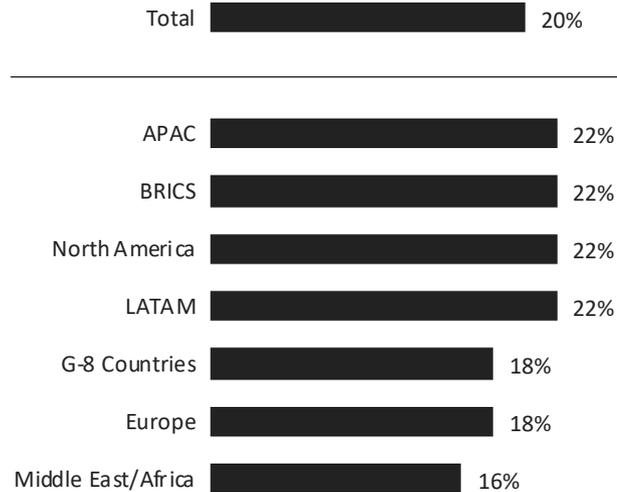
CRYPTOCURRENCIES ARE TOO COMPLICATED TO USE

Two in ten (20%) are unlikely to purchase cryptocurrencies because they perceive them as being too complicated to use, ranging from a high of 41% in Indonesia to a low of 8% in Kenya.



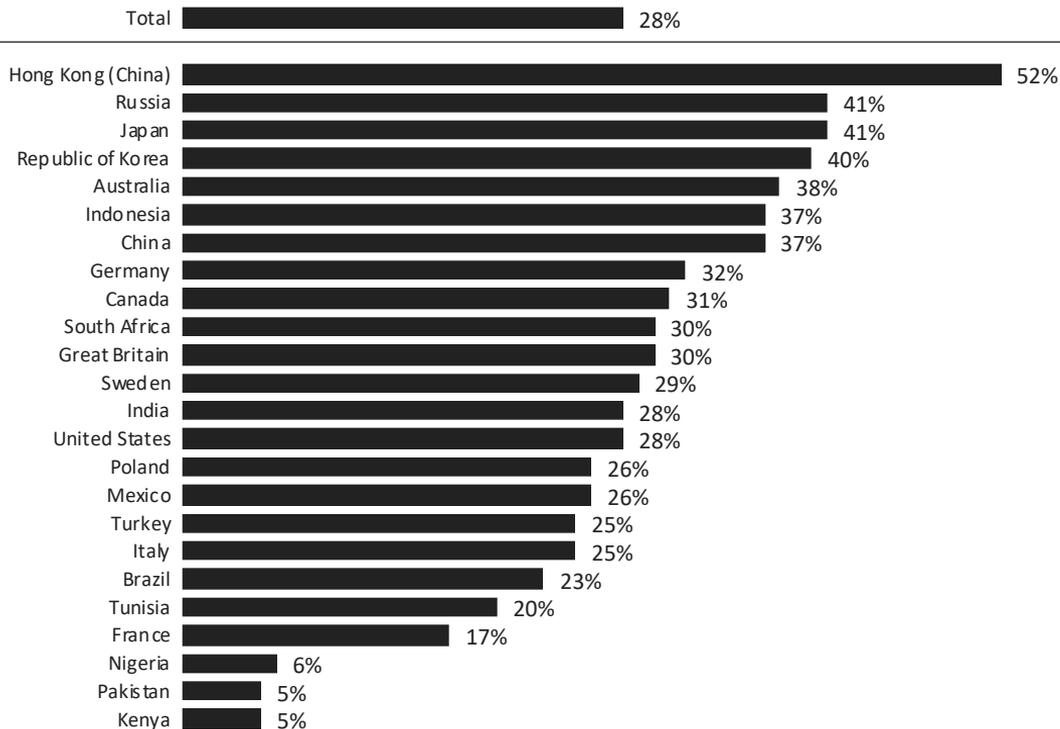
CRYPTOCURRENCIES ARE TOO COMPLICATED TO USE

There is surprisingly little regional variation in terms of the perceived complexity of cryptocurrencies.



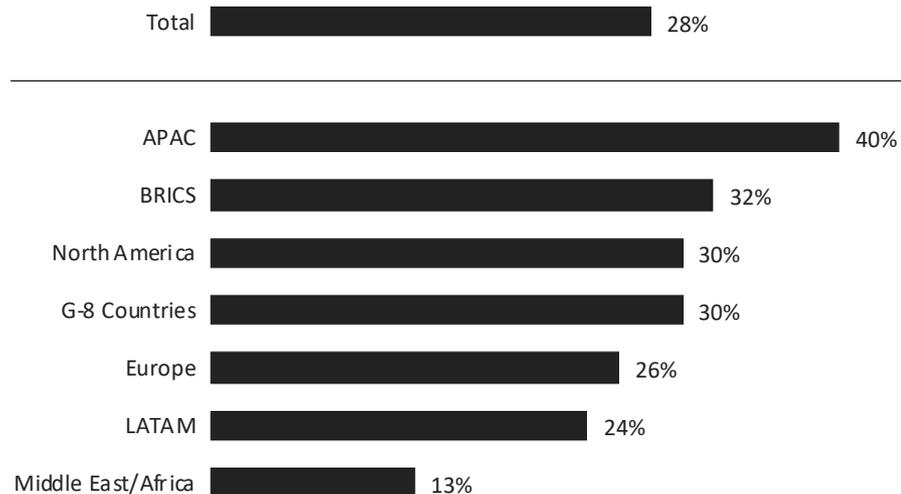
THE PRICE OF CRYPTOCURRENCIES IS TOO UNSTABLE

Over a quarter (28%) of those who are unlikely to purchase cryptocurrencies cite the lack of stability in price as a reason why they don't plan on using this currency. Over half (52%) in Hong Kong (China) cite this as a reason for non-use.



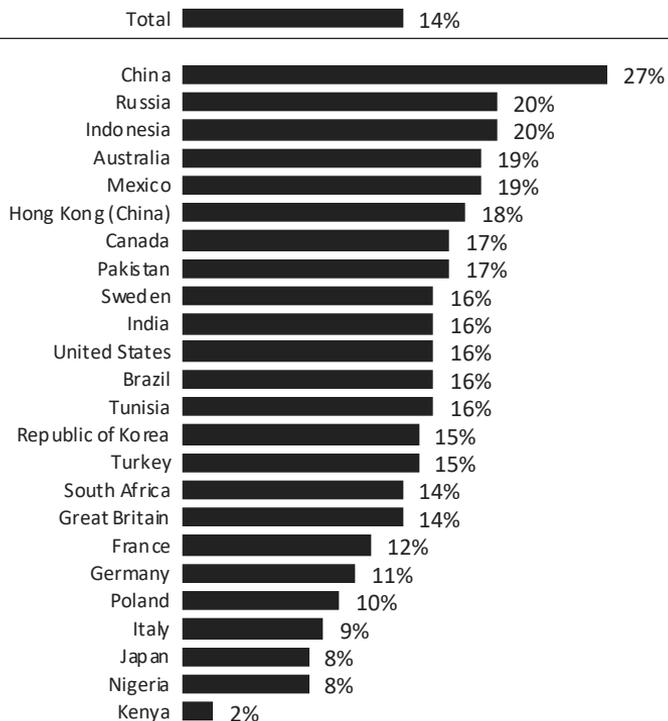
THE PRICE OF CRYPTOCURRENCIES IS TOO UNSTABLE

Those in APAC economies tend to be more likely to cite a lack of price stability; those in the Middle East & Africa, less so.



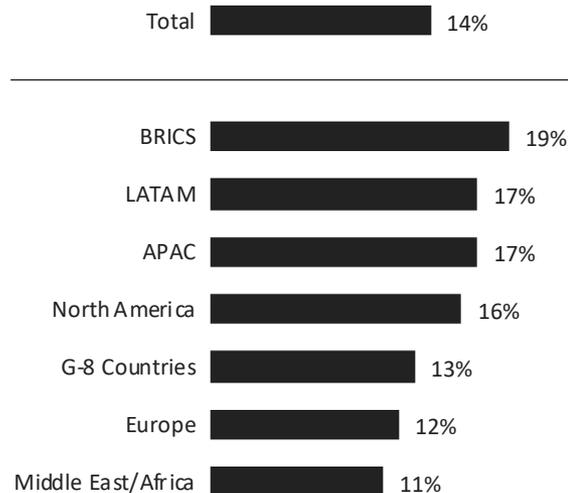
NOT ENOUGH GOODS AND SERVICES ARE AVAILABLE FOR PURCHASE WITH CRYPTOCURRENCIES

Only fourteen percent (14%) feel as though there are not enough goods & services available for purchase with cryptocurrencies to justify their use, with Chinese citizens about twice as likely, relative to the global average, to list this as a deterrent.



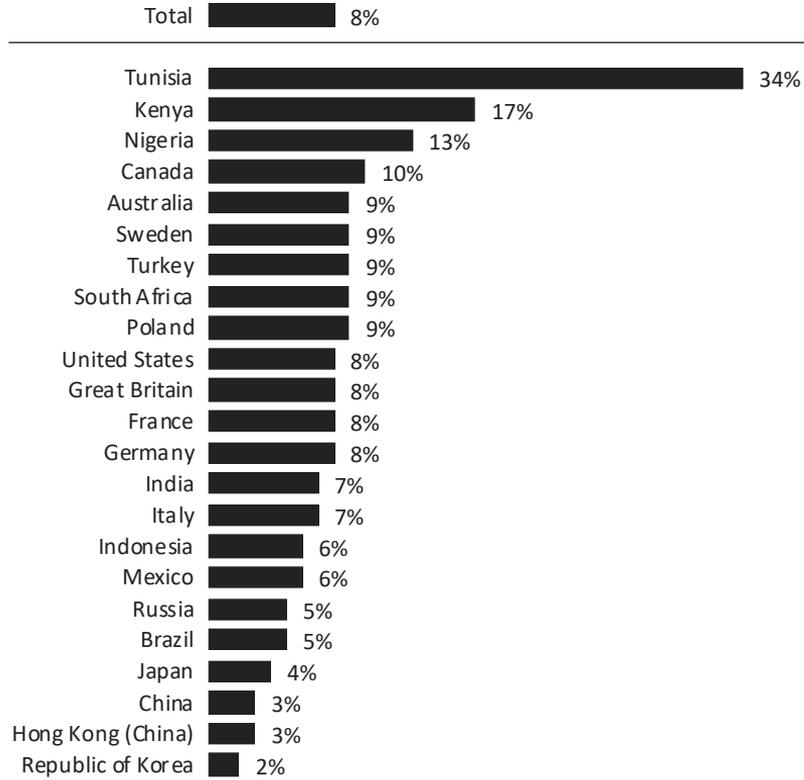
NOT ENOUGH GOODS AND SERVICES ARE AVAILABLE FOR PURCHASE WITH CRYPTOCURRENCIES

The BRICS economies are nearly twice as likely, relative to Europe & the G-8, to describe a lack of available goods & services as a reason for not using cryptocurrencies.



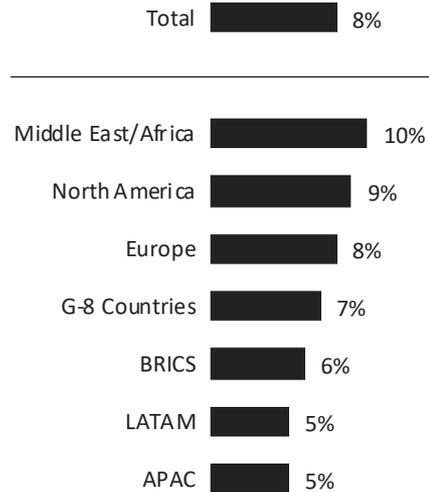
OTHER

Eight percent (8%) of those who are unlikely to use cryptocurrencies offer some other reason for taking this particular course of action.



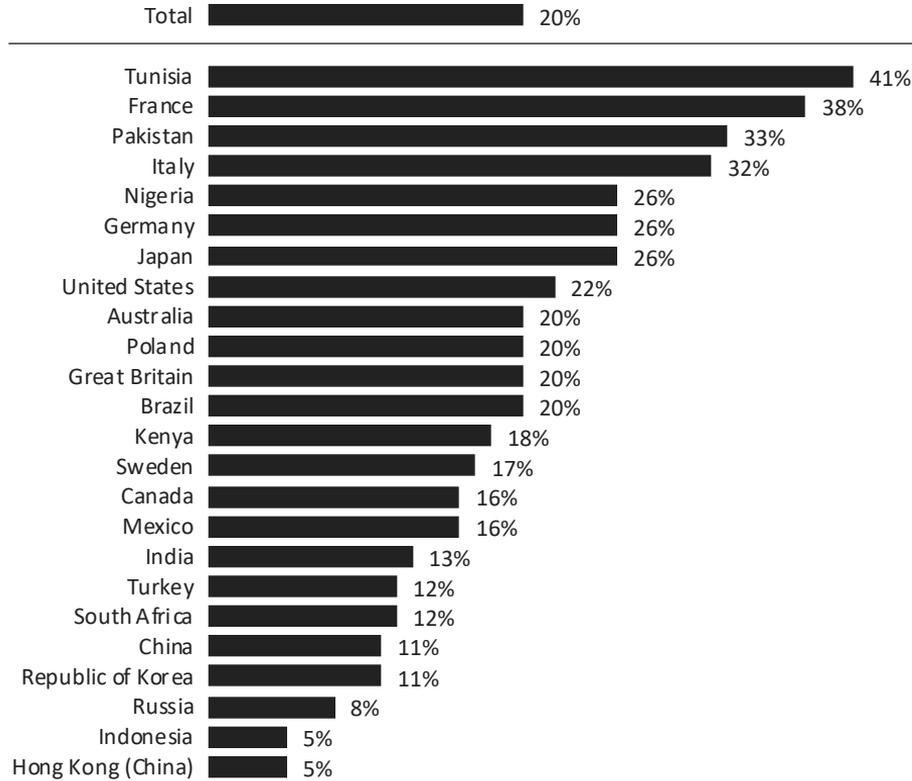
OTHER

There is limited regional variation in terms of other responses.



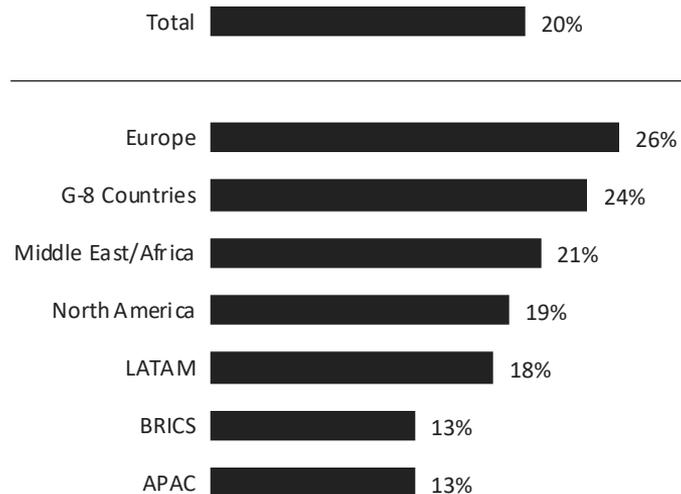
NONE OF THE ABOVE

As many as one in five (20%) global citizens who are unlikely to use cryptocurrencies offer no particular reason for their decision, ranging from a high of 41% in Tunisia to lows of 5% in Indonesia & Hong Kong (China).

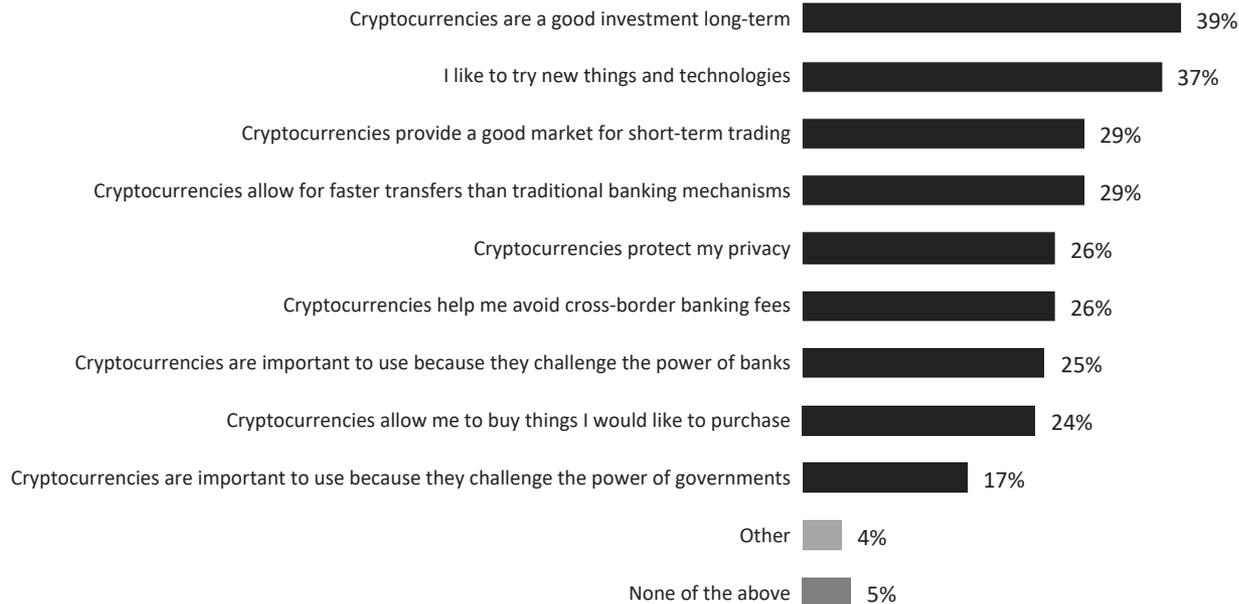


NONE OF THE ABOVE

Europeans & G-8 citizens are about twice as likely, relative to those in BRICS & APAC, to decline to offer a reason for not purchasing or using cryptocurrencies, in the next year.

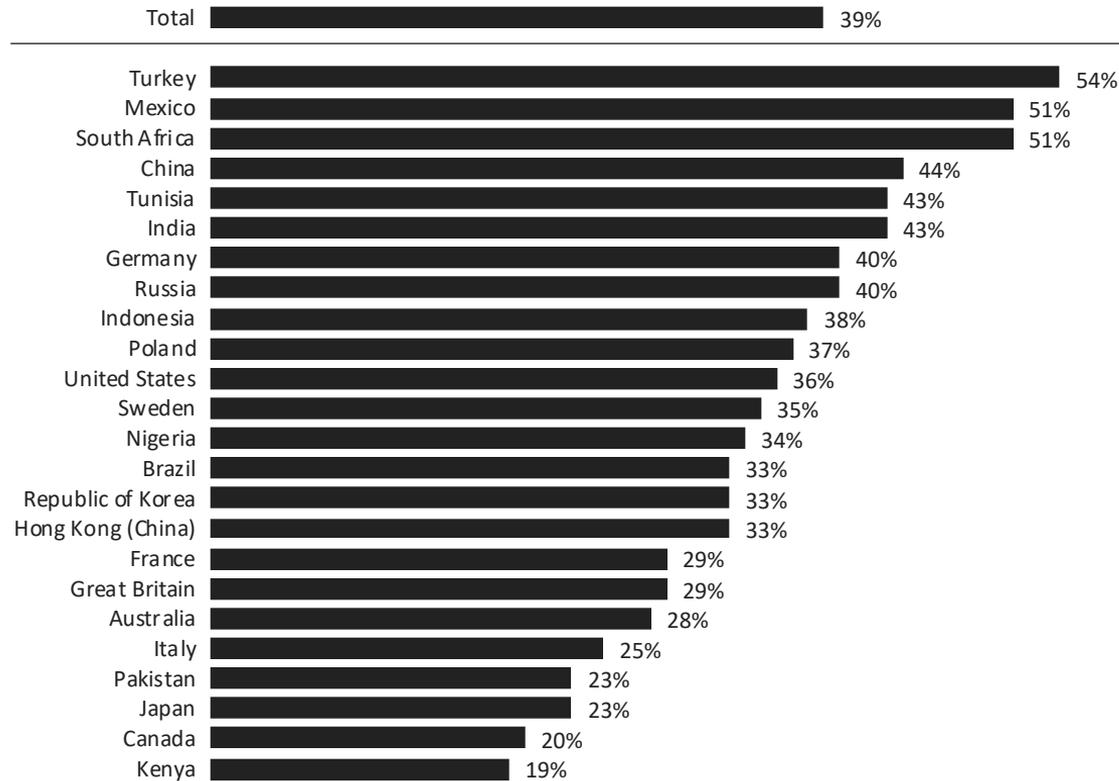


When asked why they plan on using or purchasing cryptocurrencies, the most commonly cited reasons by those who plan on doing this are a general interest in trying new things & technologies, as well as the perceived long-term value of cryptocurrencies as an investment.



CRYPTOCURRENCIES ARE A GOOD INVESTMENT LONG TERM

Overall, four in ten (39%) of those who plan on purchasing cryptocurrencies cite their value as long-term investments as a reason for doing this, including majorities in Turkey (54%), Mexico & South Africa (51% apiece).



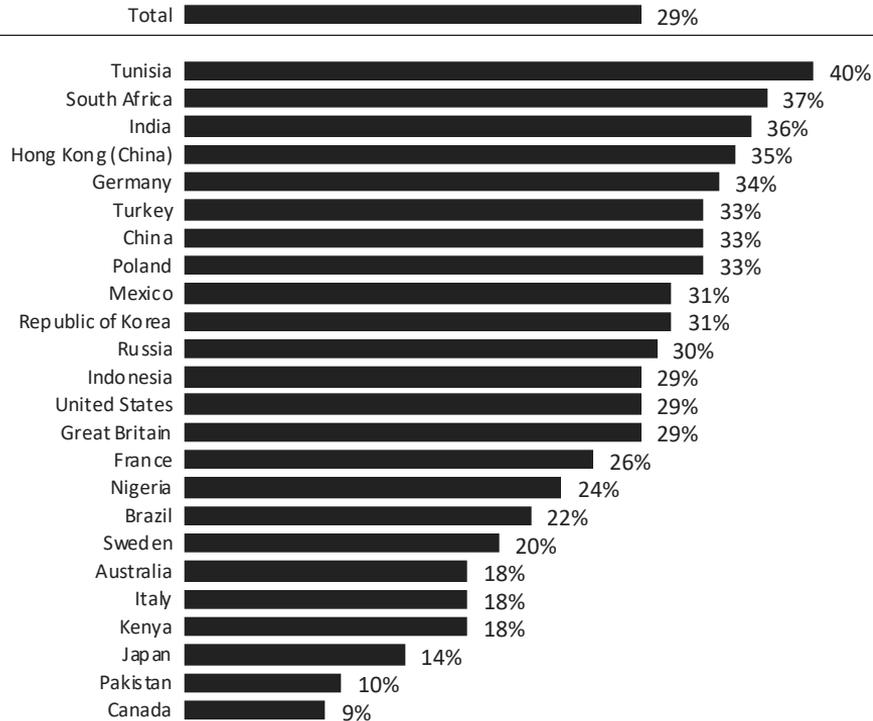
CRYPTOCURRENCIES ARE A GOOD INVESTMENT LONG TERM

Prospective users in developed economies, such as Europe, North America & the G-8, are less likely, compared to the global average, to view cryptocurrencies as being good long-term investments.



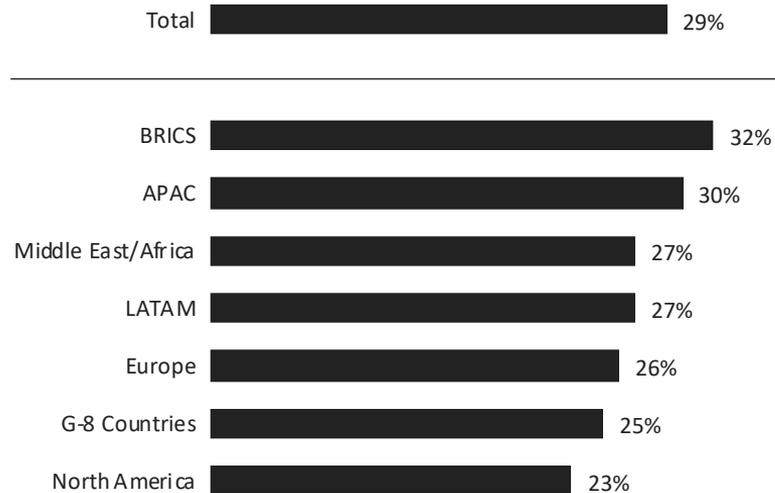
CRYPTOCURRENCIES PROVIDE A GOOD MARKET FOR SHORT-TERM TRADING

Three in ten (29%) of those who plan to use cryptocurrencies in the future say that they will do so because they think there is a good market for short-term trading. Residents of Canada & Pakistan are more skeptical, however, with only about one in ten in both economies citing this as a reason.



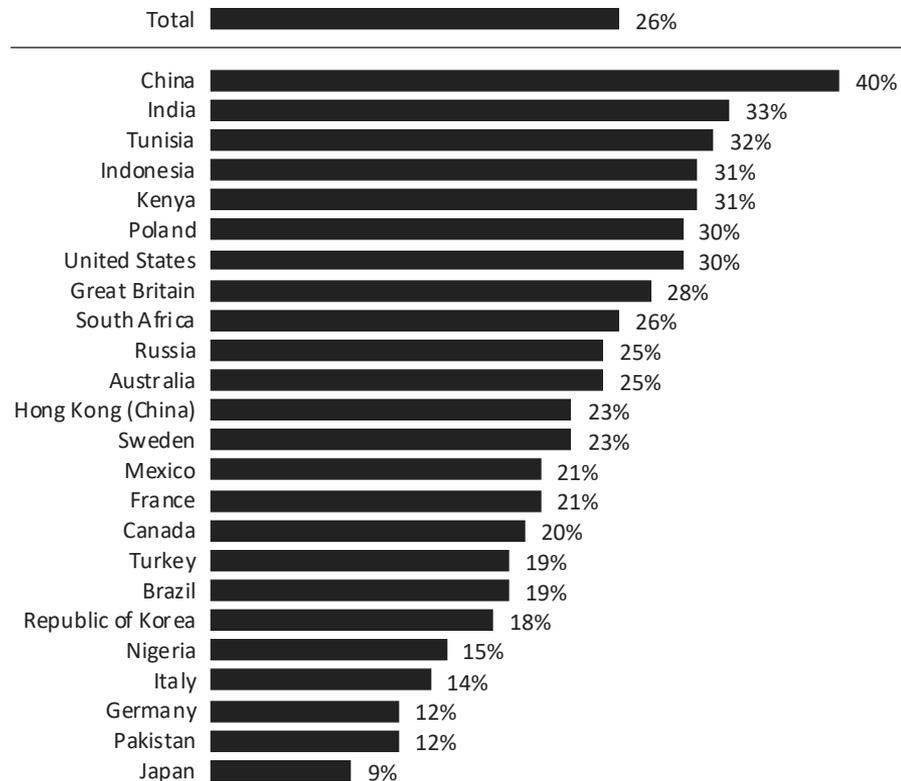
CRYPTOCURRENCIES PROVIDE A GOOD MARKET FOR SHORT-TERM TRADING

There is limited regional variation regarding the perception of cryptocurrencies as providing a good market for short-term trades.



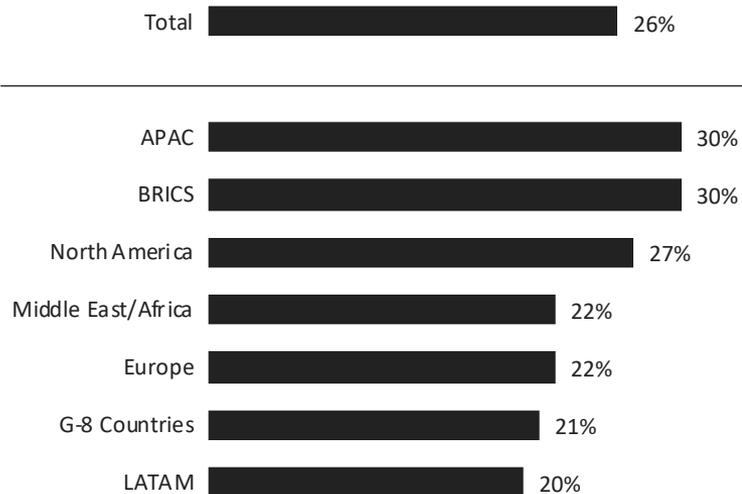
CRYPTOCURRENCIES PROTECT MY PRIVACY

One quarter (26%) of those who plan on purchasing cryptocurrencies mention privacy protection as a reason for doing this, ranging from a high of 40% in China to a low of 9% in Japan.



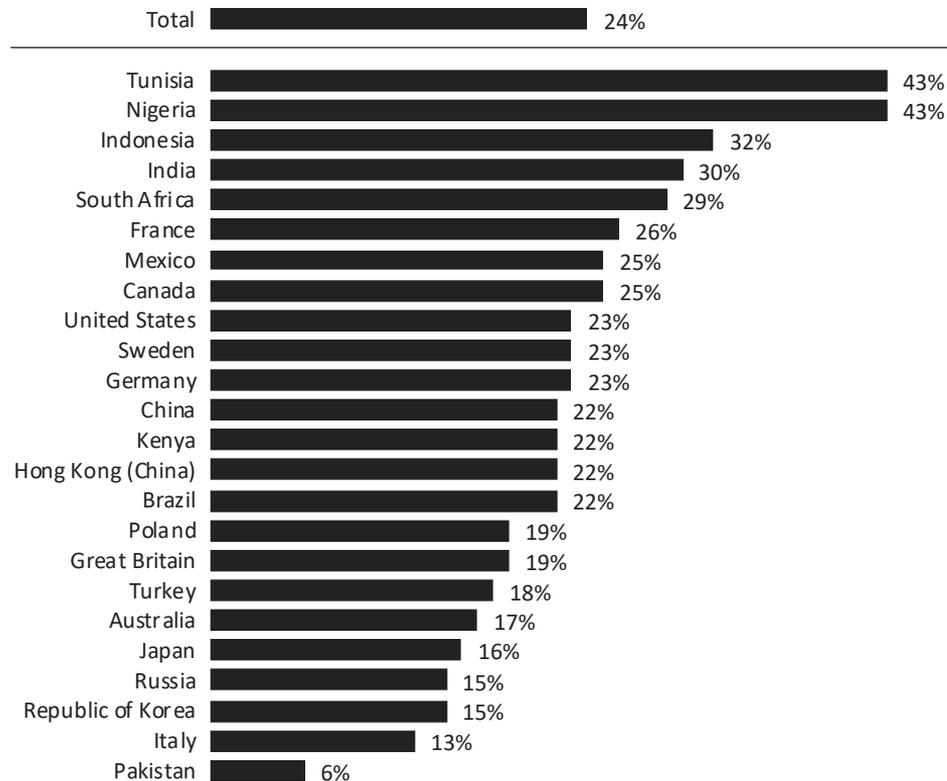
CRYPTOCURRENCIES PROTECT MY PRIVACY

Across all regional economies, between two & three in ten prospective users cite privacy protections as a reason why they plan on purchasing or using cryptocurrencies, in the next year.



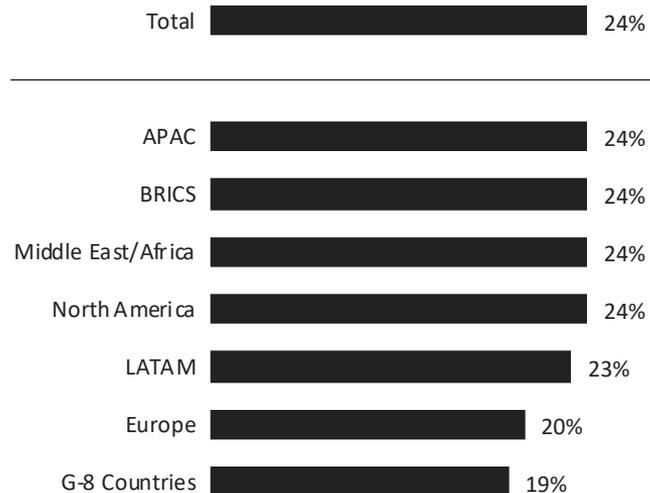
CRYPTOCURRENCIES ALLOW ME TO BUY THINGS I WOULD LIKE TO PURCHASE

Similarly, around one in four (24%) plan on using cryptocurrencies to help them buy things they would like to purchase.



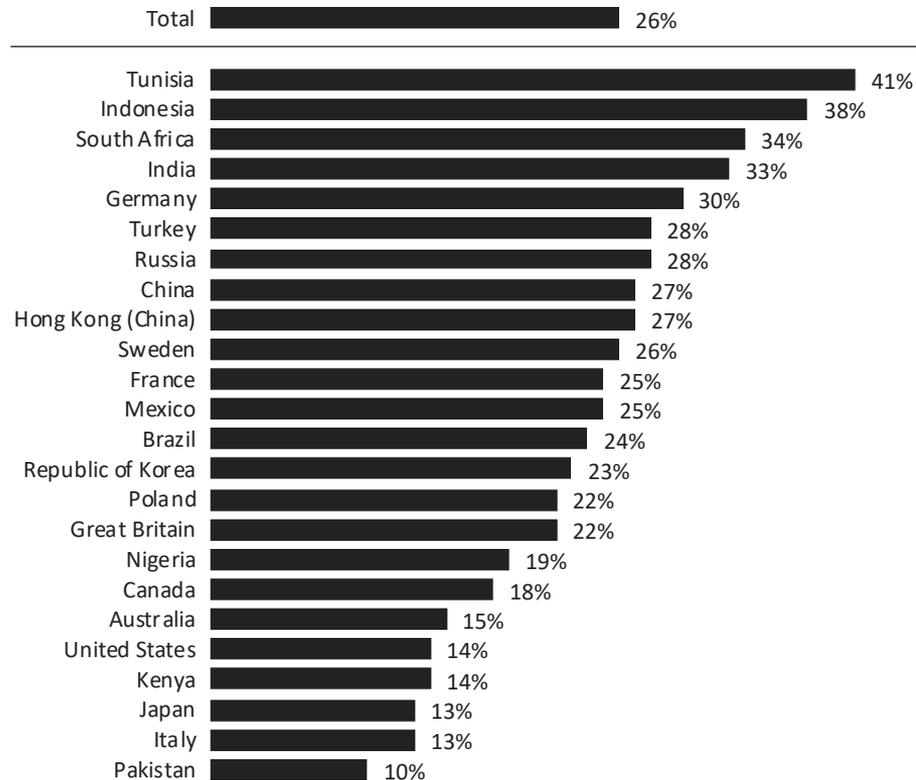
CRYPTOCURRENCIES ALLOW ME TO BUY THINGS I WOULD LIKE TO PURCHASE

There is limited regional variation, as between 19% & 24% of those who plan to use the currency think that it will help them buy things they would like to purchase.



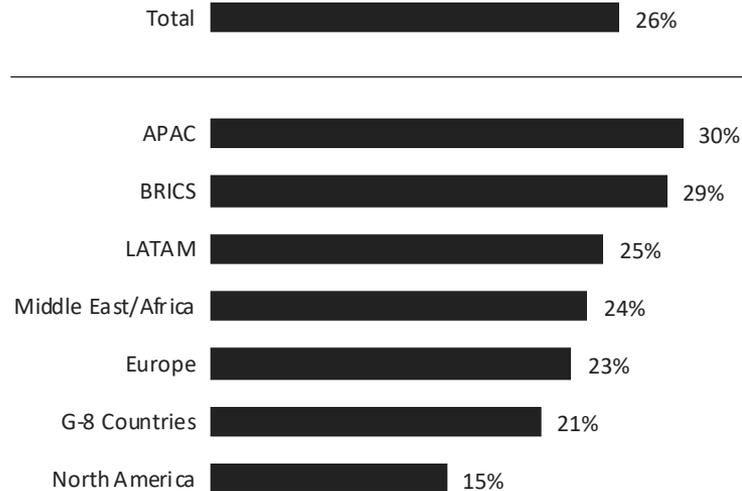
CRYPTOCURRENCIES HELP ME AVOID CROSS-BORDER BANKING FEES

One in four (26%) intend on purchasing cryptocurrencies as a way to avoid cross-border banking fees, ranging from a high of 41% in Tunisia to a low of 10% in Pakistan.



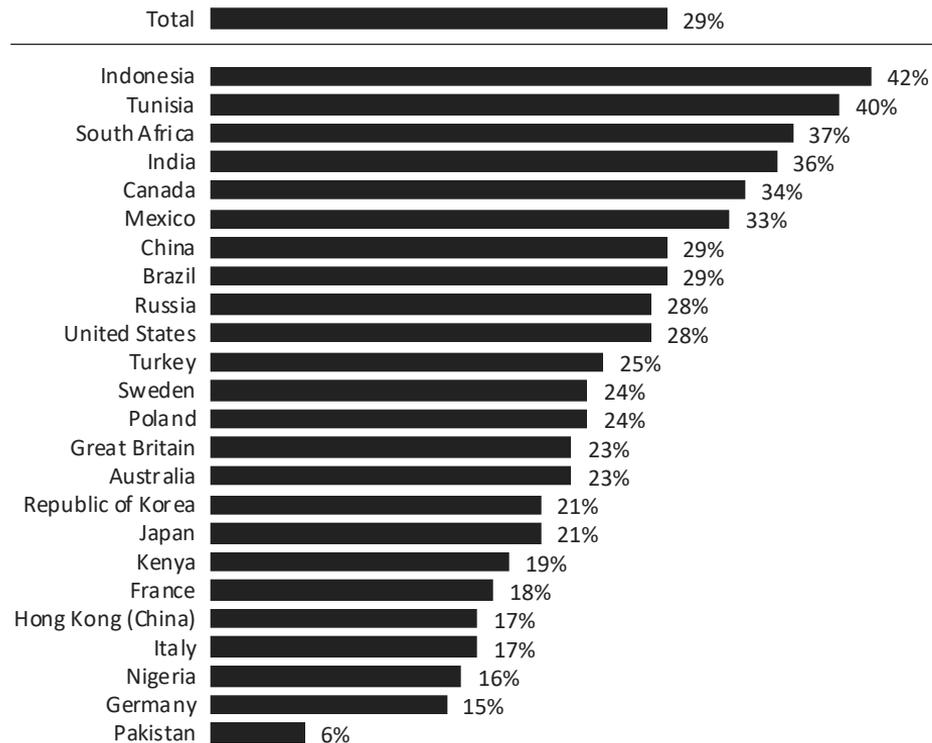
CRYPTOCURRENCIES HELP ME AVOID CROSS-BORDER BANKING FEES

North Americans who plan on using cryptocurrencies tend to be less likely to say that they will do this because it helps them avoid cross-border banking fees.



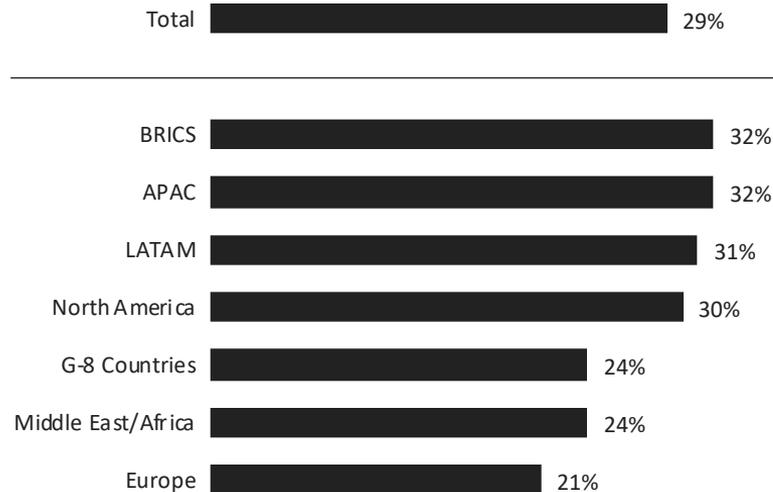
CRYPTOCURRENCIES ALLOW FOR FASTER TRANSFERS THAN TRADITIONAL BANKING MECHANISMS

Around one in three (29%) of those who plan to use cryptocurrencies list improved speed & efficiency, relative to traditional banking methods, as a reason for doing this, ranging from a high of 42% in Indonesia to a low of 6% in Pakistan.



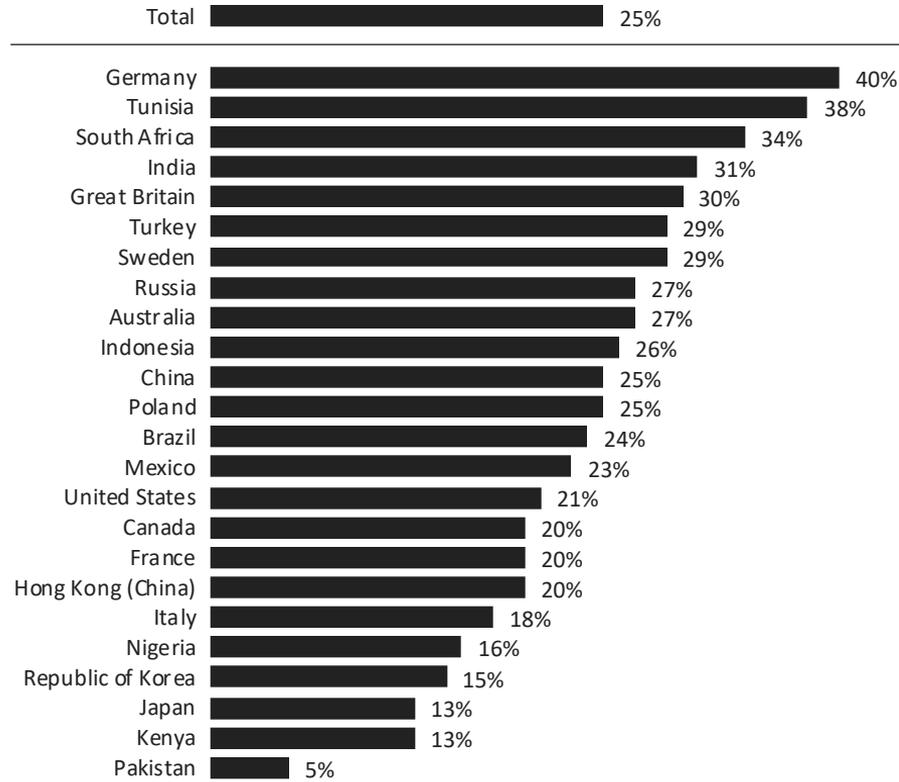
CRYPTOCURRENCIES ALLOW FOR FASTER TRANSFERS THAN TRADITIONAL BANKING MECHANISMS

Europeans are much less likely, relative to the global average, to list speed & efficiency as reasons for their planned future use of cryptocurrencies.



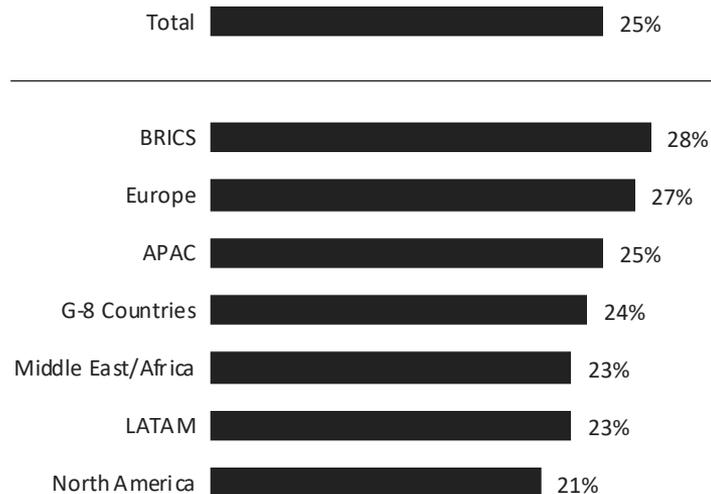
CRYPTOCURRENCIES ARE IMPORTANT TO USE BECAUSE THEY CHALLENGE THE POWER OF BANKS

One quarter (25%) of those who plan to use cryptocurrencies say that they will do this simply for the purpose of challenging the power of banks, ranging from a high of 40% in Germany to a low of 5% in Pakistan.



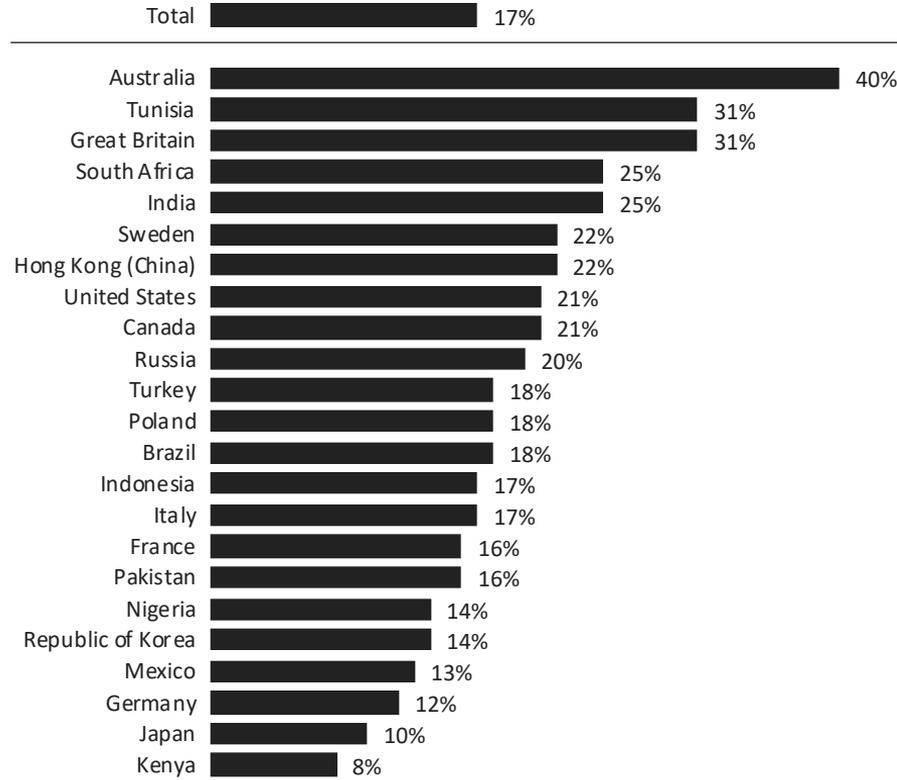
CRYPTOCURRENCIES ARE IMPORTANT TO USE BECAUSE THEY CHALLENGE THE POWER OF BANKS

There is limited regional variation on this metric as between one in five & one in four prospective users across the regional economies plan to purchase or use cryptocurrencies to challenge the power of traditional banks.



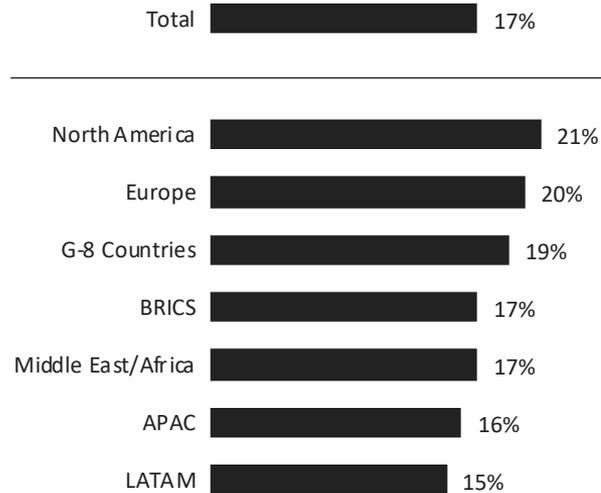
CRYPTOCURRENCIES ARE IMPORTANT TO USE BECAUSE THEY CHALLENGE THE POWER OF GOVERNMENTS

Just seventeen percent (17%) think that cryptocurrencies are important because they challenge the power of governments, ranging from a high of 40% in Australia to a low of 8% in Kenya.



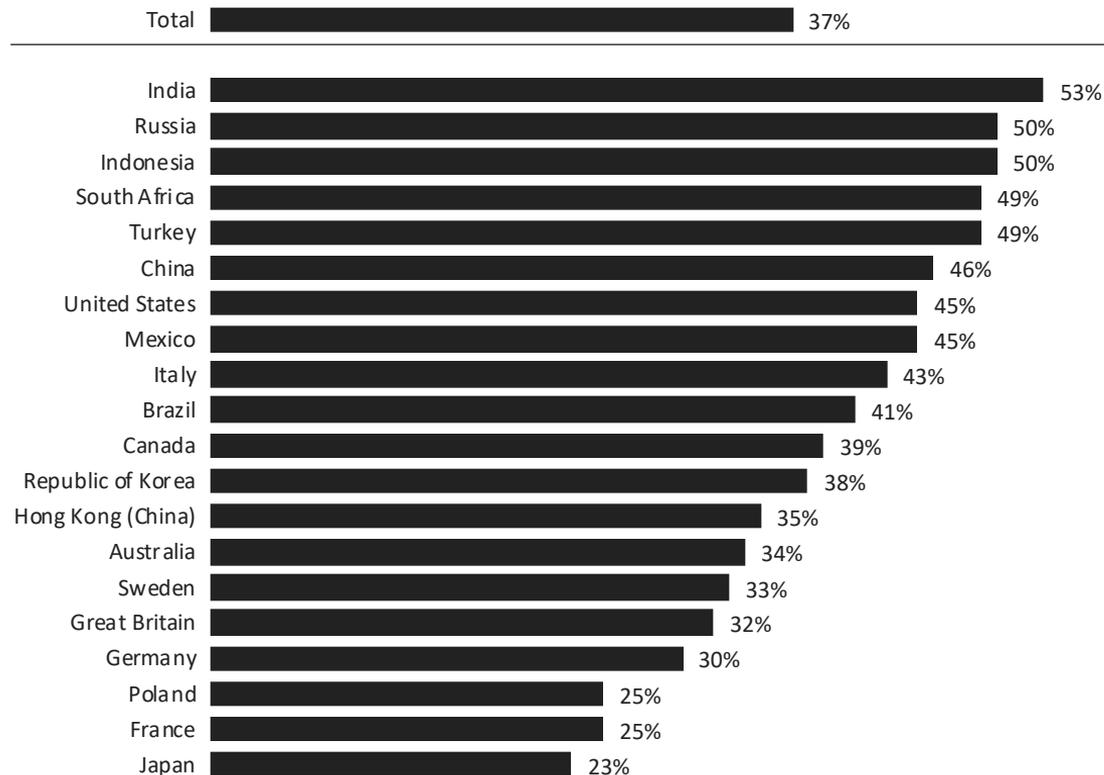
CRYPTOCURRENCIES ARE IMPORTANT TO USE BECAUSE THEY CHALLENGE THE POWER OF GOVERNMENTS

There is limited regional variation in the perception of cryptocurrencies as a mechanism which can be used to challenge the power of government.



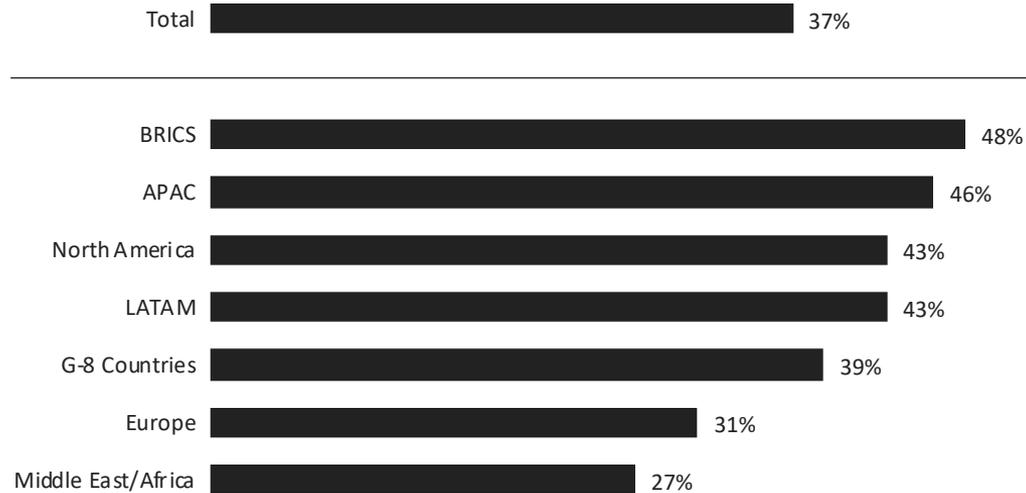
I LIKE TO TRY NEW THINGS AND TECHNOLOGIES

More than one-third (37%) plan on using cryptocurrencies because they like trying new things & technologies, ranging from a majority in India (53%) to one in four (23%) in Japan.



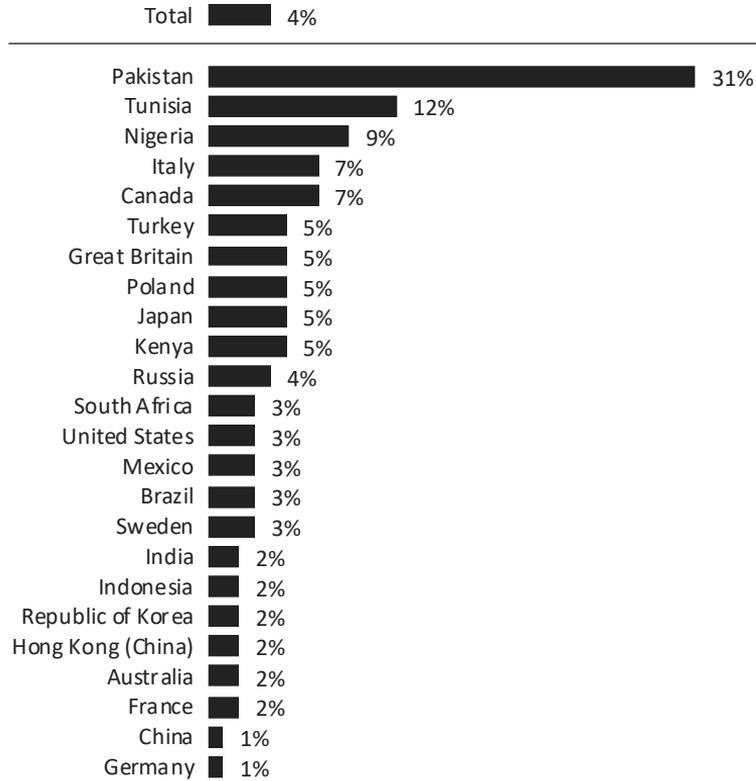
I LIKE TO TRY NEW THINGS AND TECHNOLOGIES

The BRICS & APAC economies outpace the global average, considerably, whereas the Middle East & Africa falls well below it, on this metric.



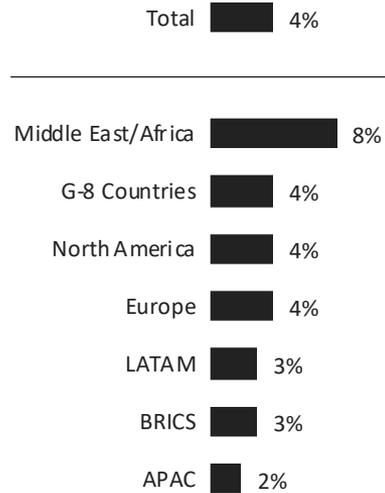
OTHER

Just four percent (4%) of declared future users provide some other response, when asked why they plan on purchasing or using cryptocurrencies in the future.



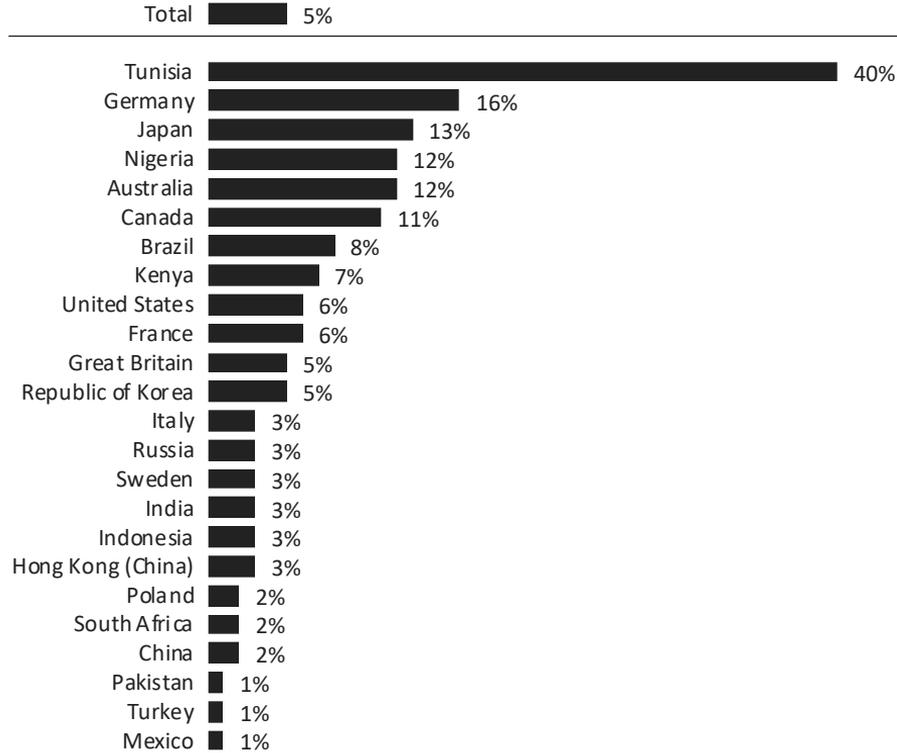
OTHER

There is limited regional variation in the incidence of other responses.



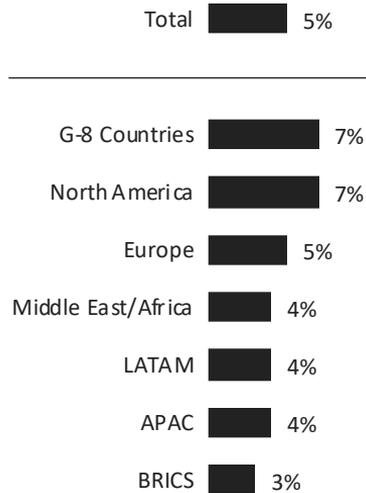
NONE OF THE ABOVE

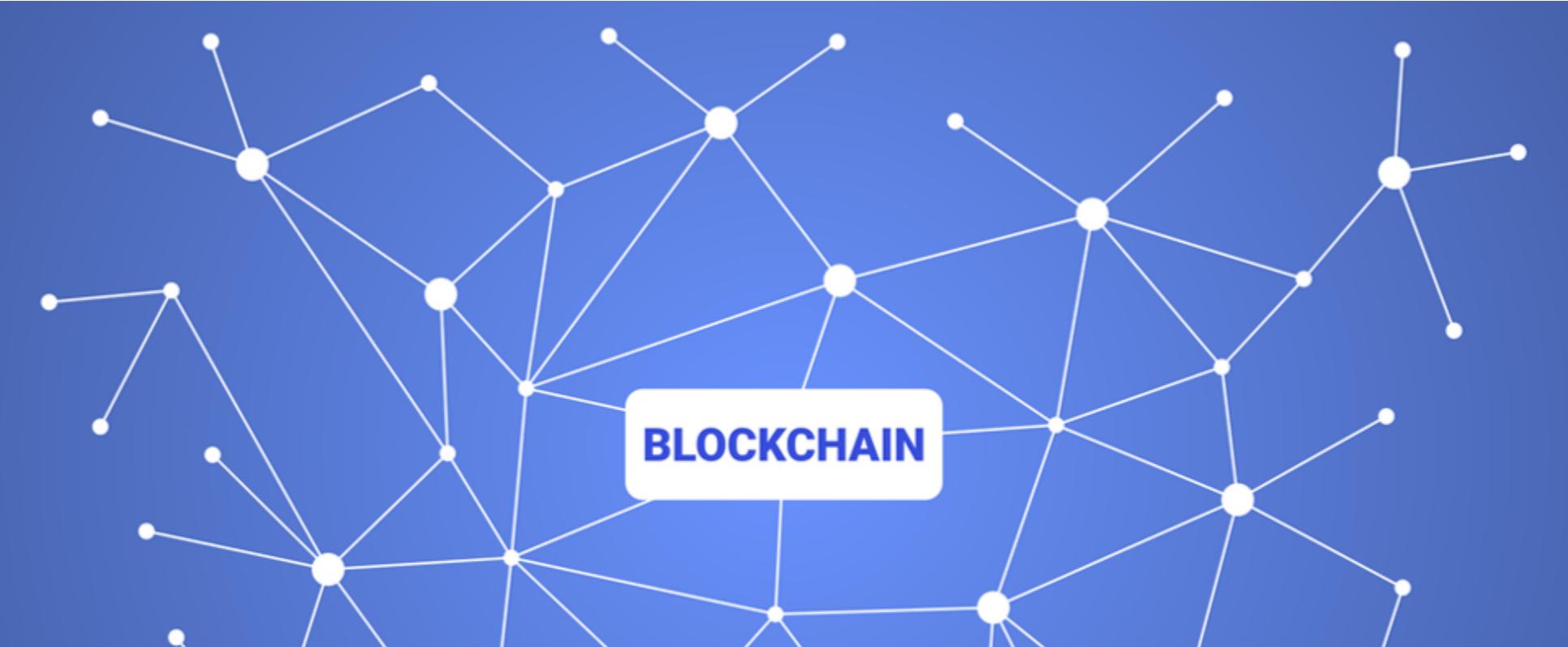
Five percent (5%) of prospective users indicate that there is no particular reason why they plan to use or purchase cryptocurrencies in the future.



NONE OF THE ABOVE

Those who reside in more developed economies, such as North America, the G-8 & Europe, tend to be a little less likely to offer any reason for planning to use or purchase cryptocurrencies in the future.

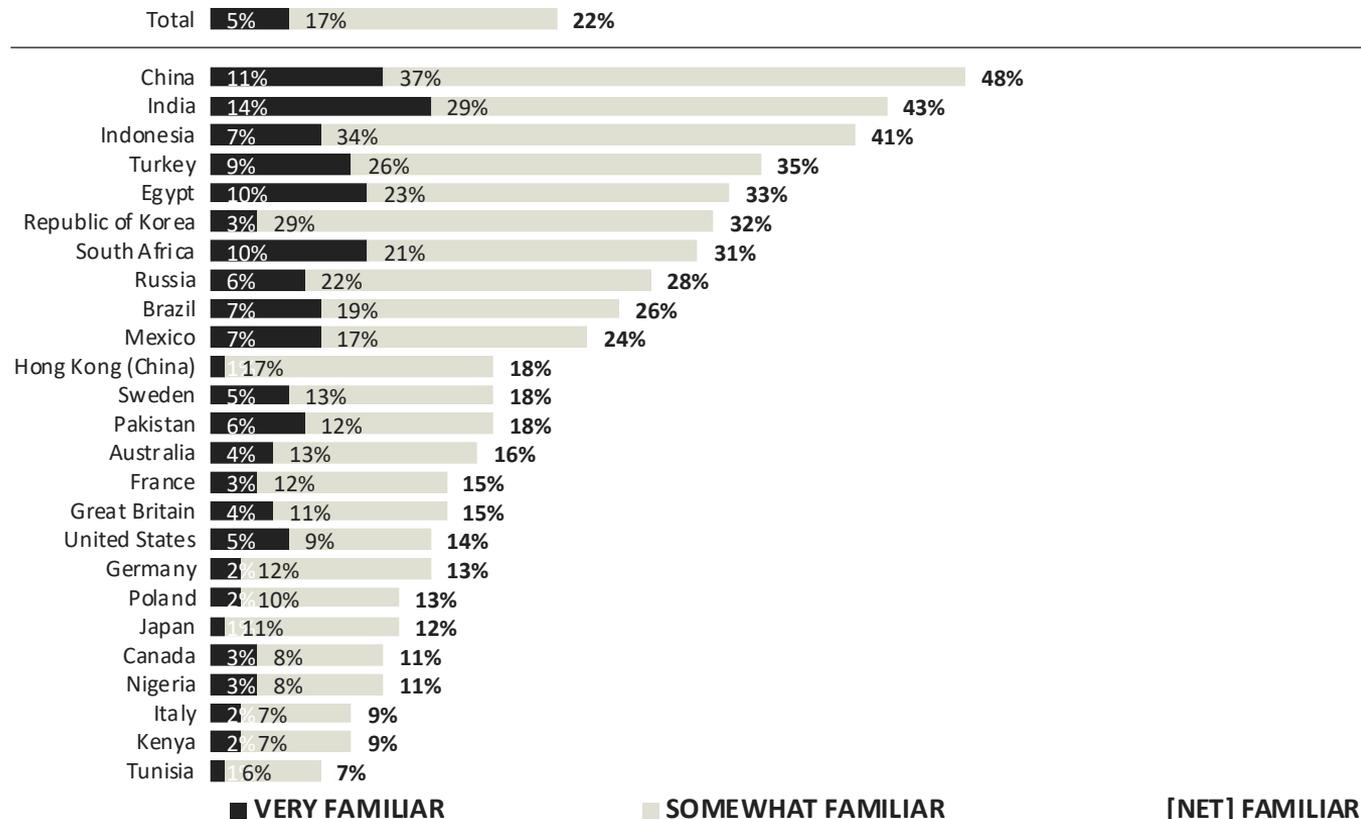




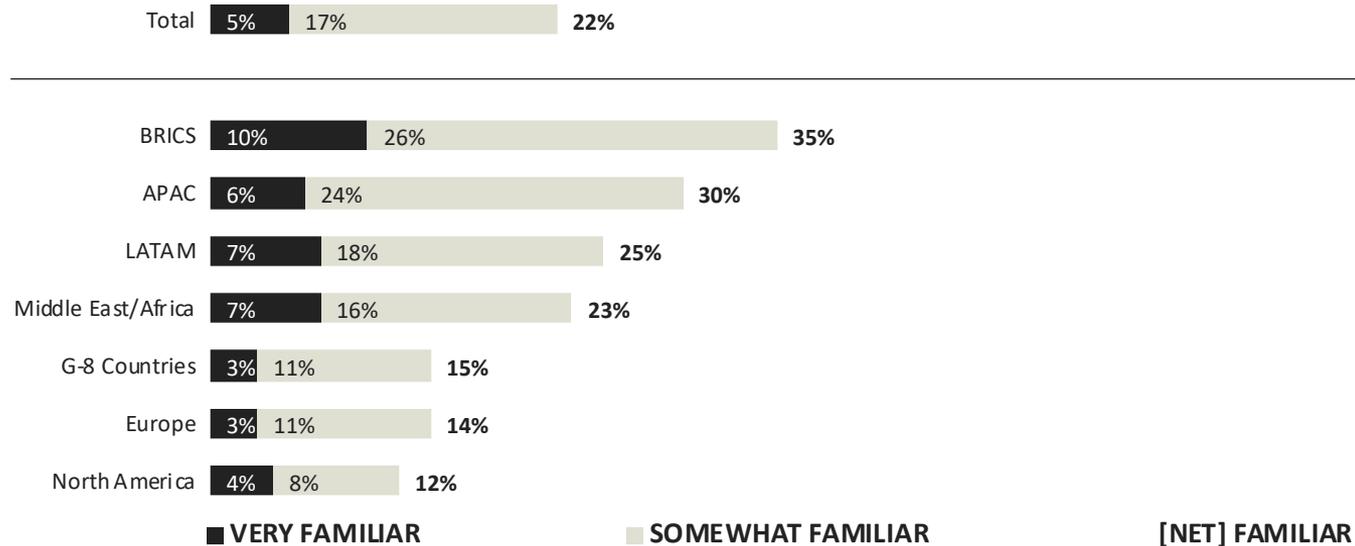
BLOCKCHAIN

BLOCKCHAIN TECHNOLOGY

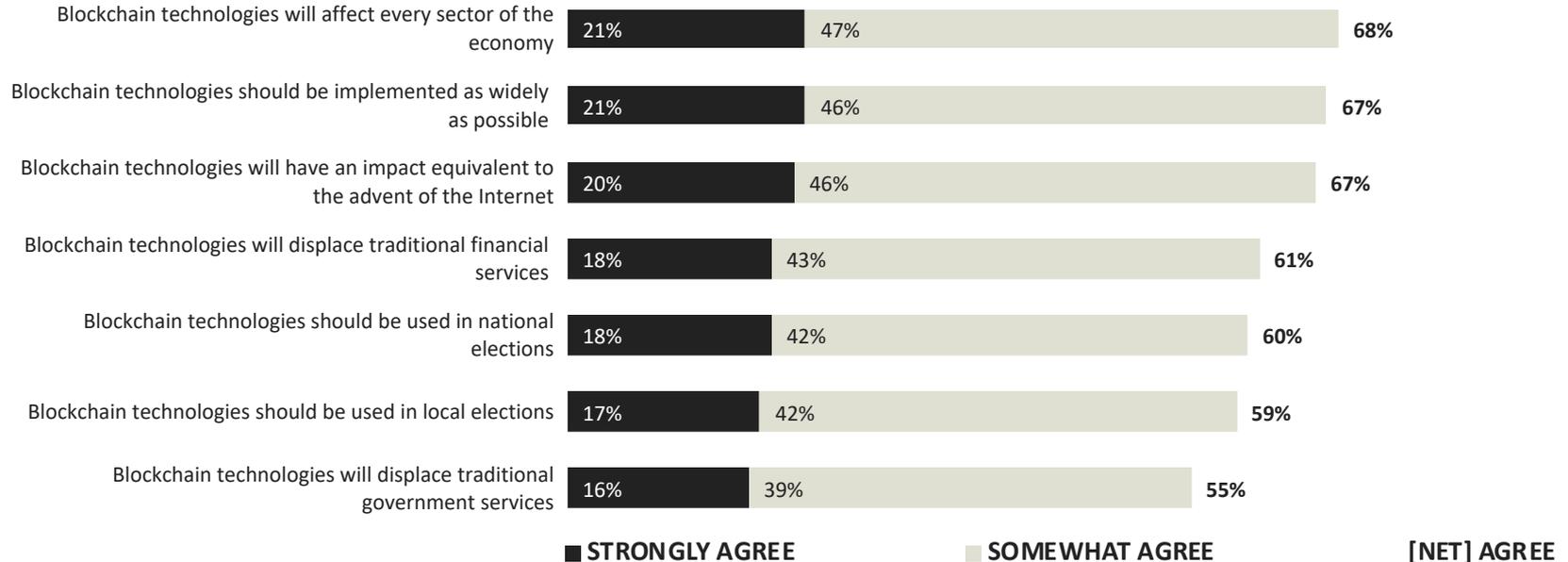
Overall, just over one in five (22%) global citizens are at least *somewhat familiar* with blockchain technology, though few (5%) claim to be *very familiar* with it. On the high end, nearly half (48%) of Chinese citizens are *familiar* with the technology compared to just 7% of Tunisians, on the low end.



Familiarity with blockchain technology tends to be higher in the BRICS economies (35%), but lower in the more developed economies of North America (12%), Europe (14%), and the G-8 more generally (15%).

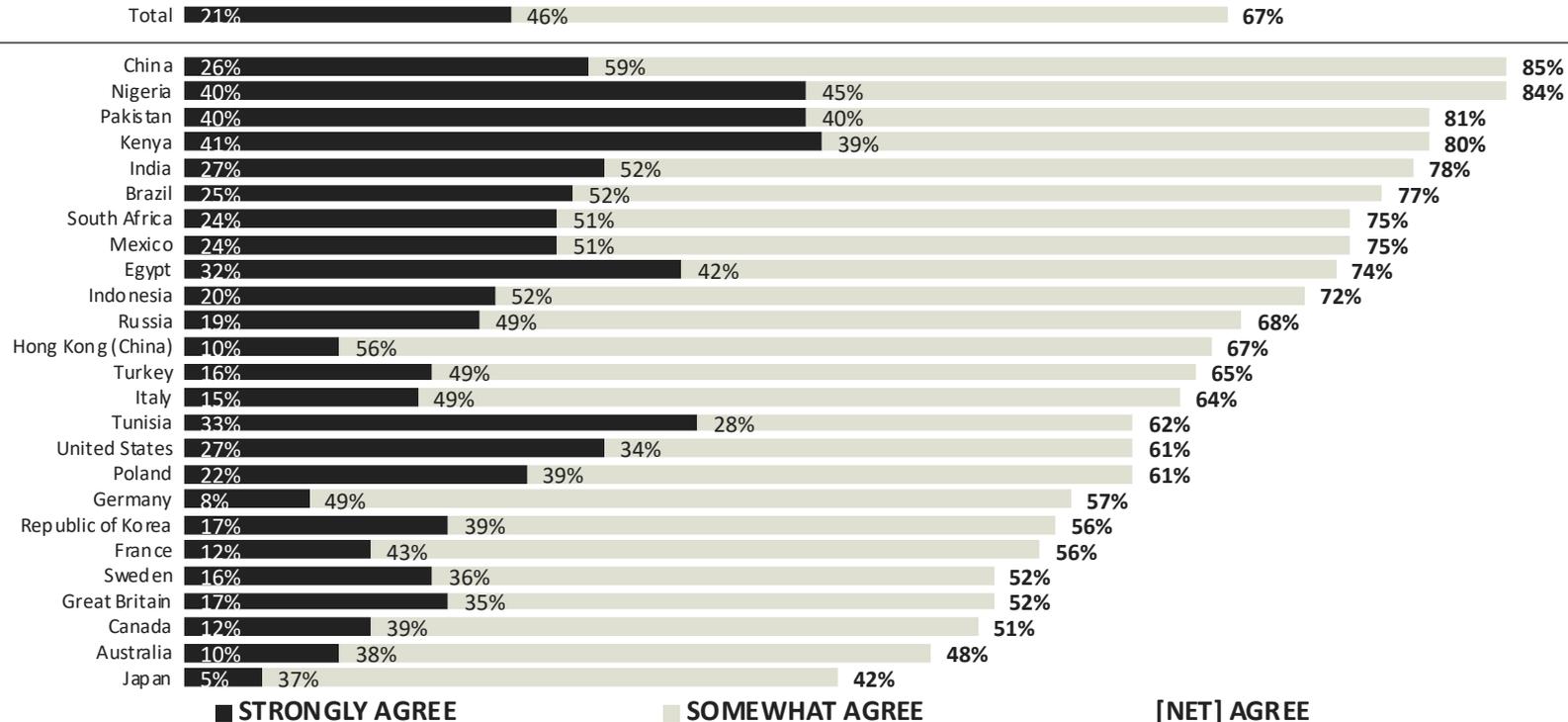


At around two in three, the highest proportion of those who are at least mildly *familiar* with blockchain technologies *agree* that they will impact every sector of the economy (68%), need to be implemented as widely as possible (67%), and will have an impact that rivals the advent of the Internet (67%). Fewer believe (55%) blockchain will displace traditional government services, but 55% do still agree.



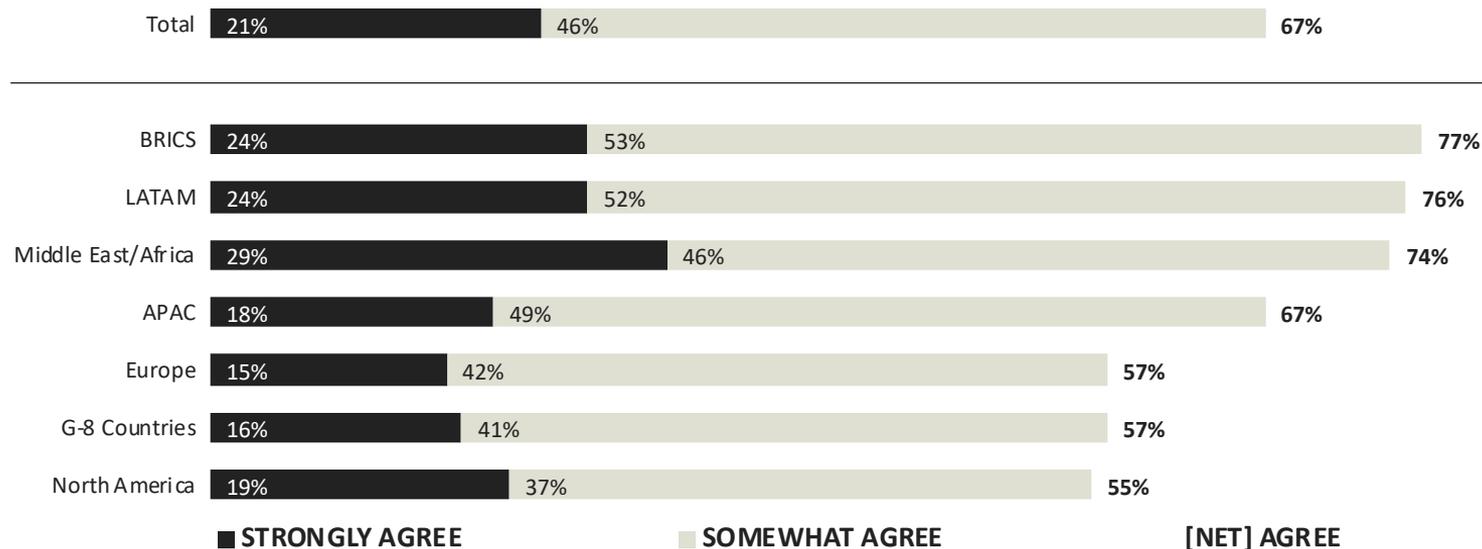
BLOCKCHAIN TECHNOLOGIES SHOULD BE IMPLEMENTED AS WIDELY AS POSSIBLE

Globally, two-thirds (67%) of those with any knowledge of blockchain technology think that it should be implemented as widely as possible, including the vast majority in China (85%) & Nigeria (84%). In fact, with the exception of Japan (42%) & Australia (48%), a majority in all other nations *agree* that the technology should be widely implemented.



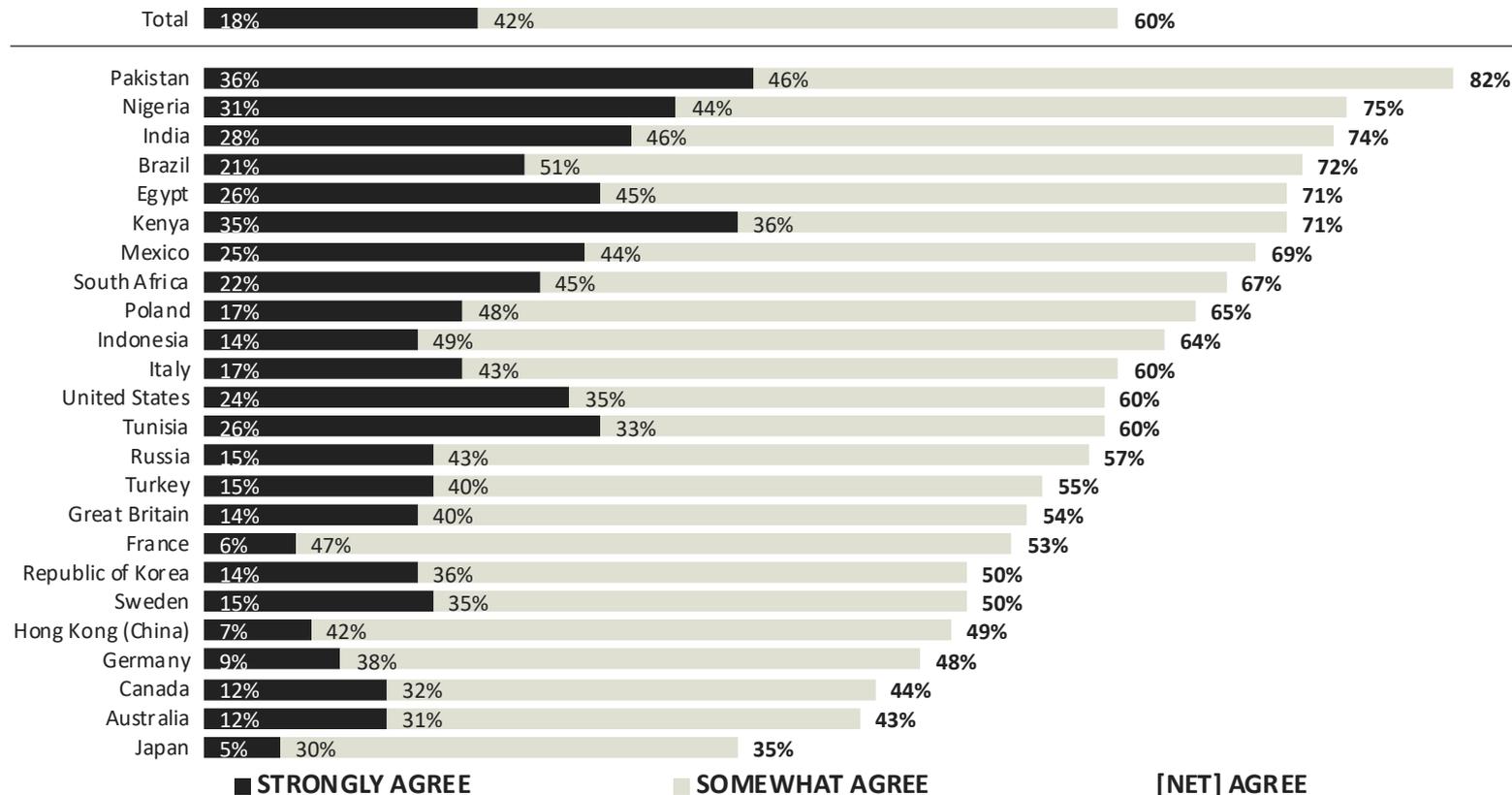
BLOCKCHAIN TECHNOLOGIES SHOULD BE IMPLEMENTED AS WIDELY AS POSSIBLE

Those in less developed economies, such as BRICS, LATAM, the Middle East & Africa, tend to be more inclined to *agree* that blockchain technologies should be widely implemented.



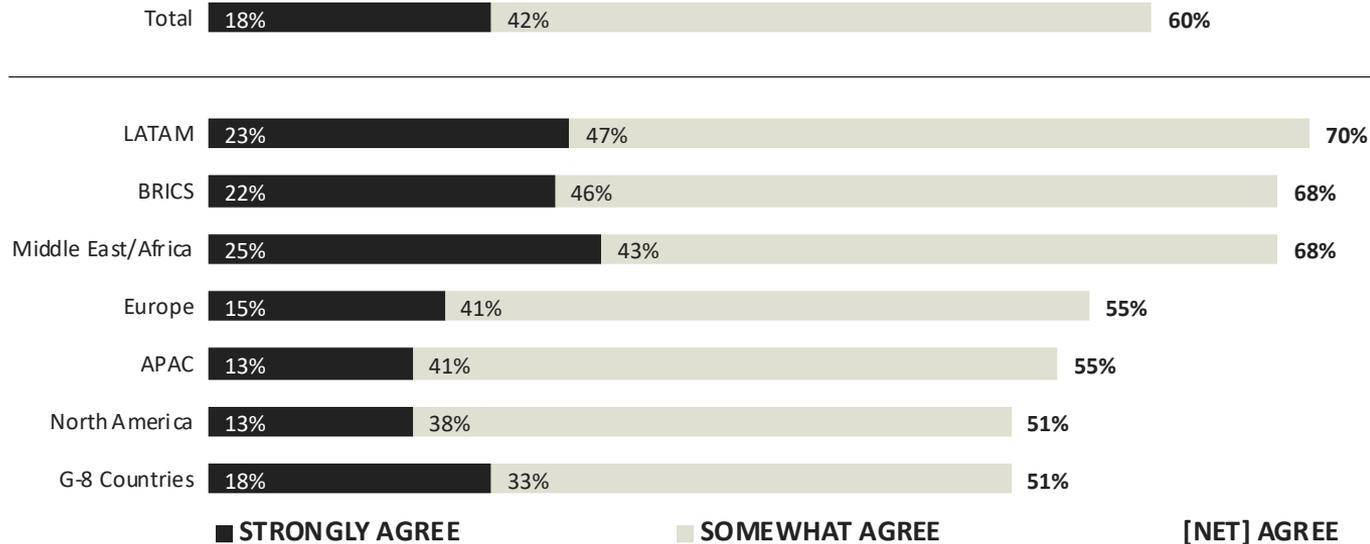
BLOCKCHAIN TECHNOLOGIES SHOULD BE USED IN NATIONAL ELECTIONS

Overall, six in ten (60%) of those with knowledge of blockchain technology *agree* that it should be used in national elections, ranging from a high of four in five in Pakistan (82%) to a low of one in three (35%) in Japan.



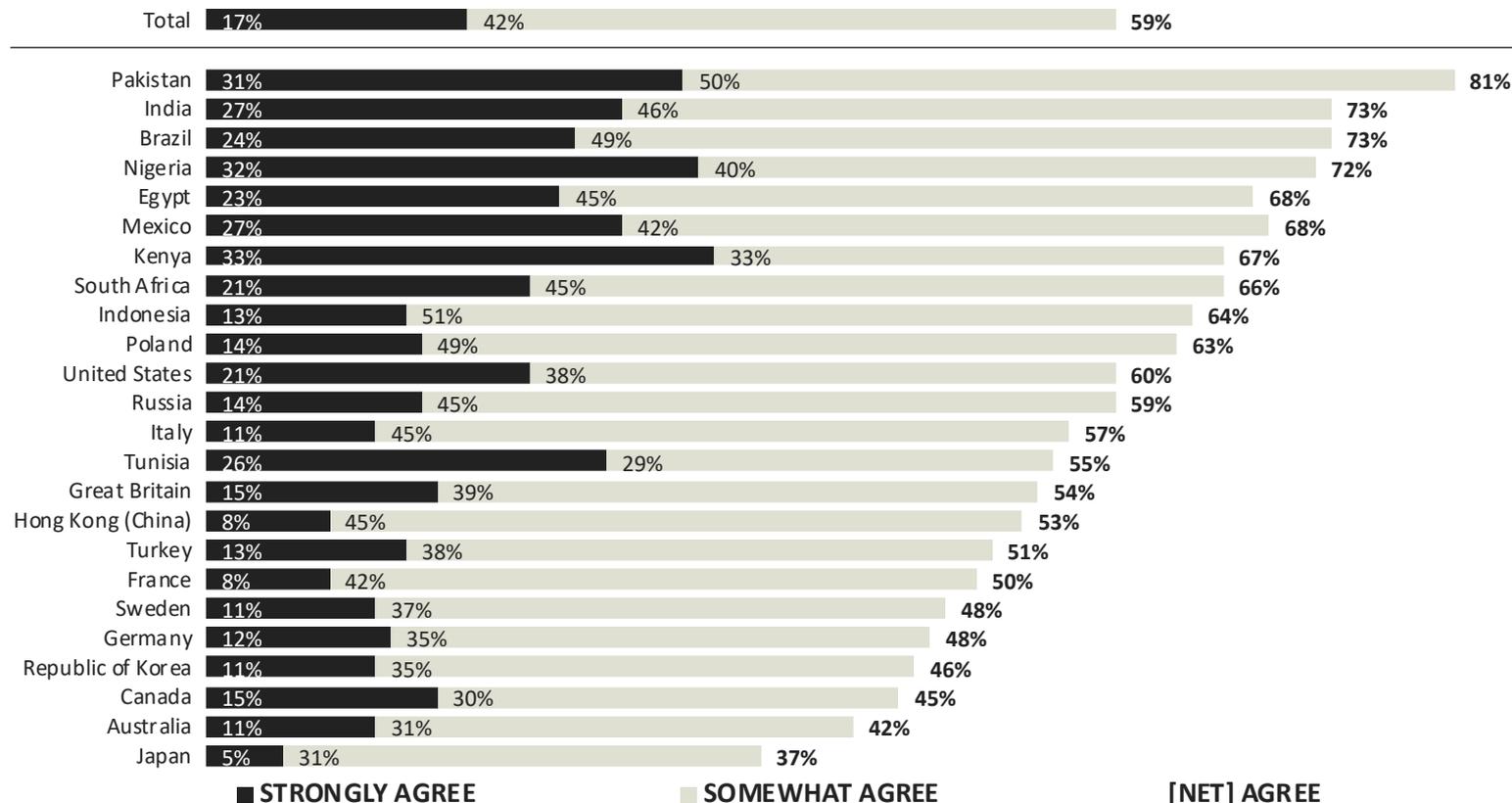
BLOCKCHAIN TECHNOLOGIES SHOULD BE USED IN NATIONAL ELECTIONS

The idea that blockchain technologies should be used in national elections tends to receive more support in developing economies, such as LATAM, BRICS, the Middle East & Africa.



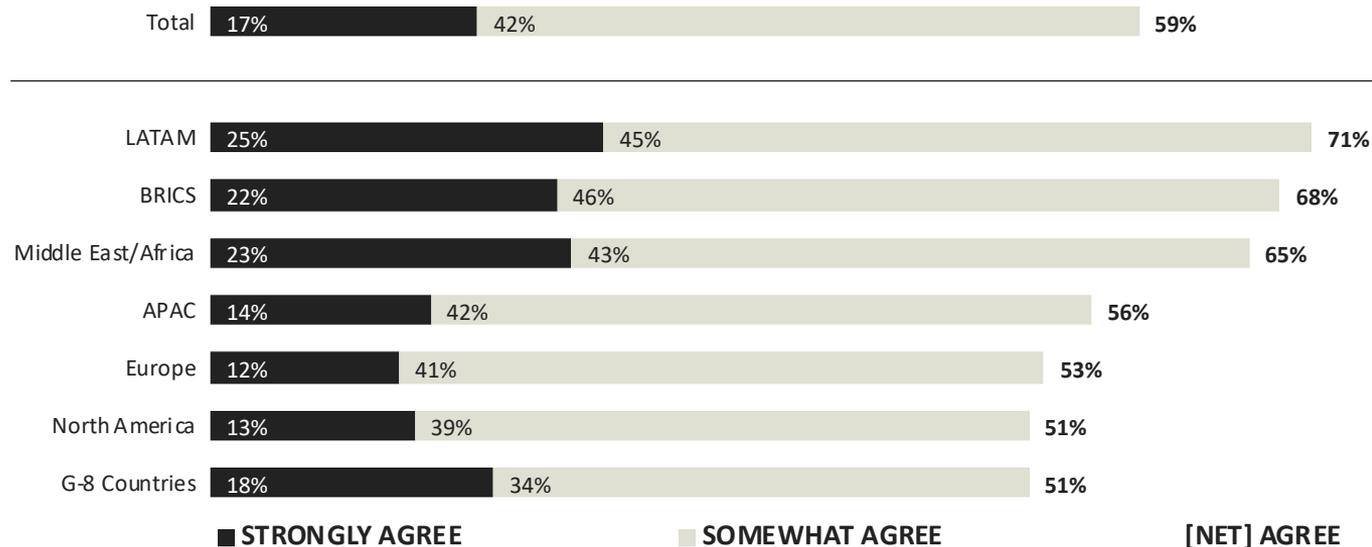
BLOCKCHAIN TECHNOLOGIES SHOULD BE USED IN LOCAL ELECTIONS

As is the case with national elections, around six in ten (59%) of those with any knowledge of blockchain technologies *agree* that they should be utilized in local elections.



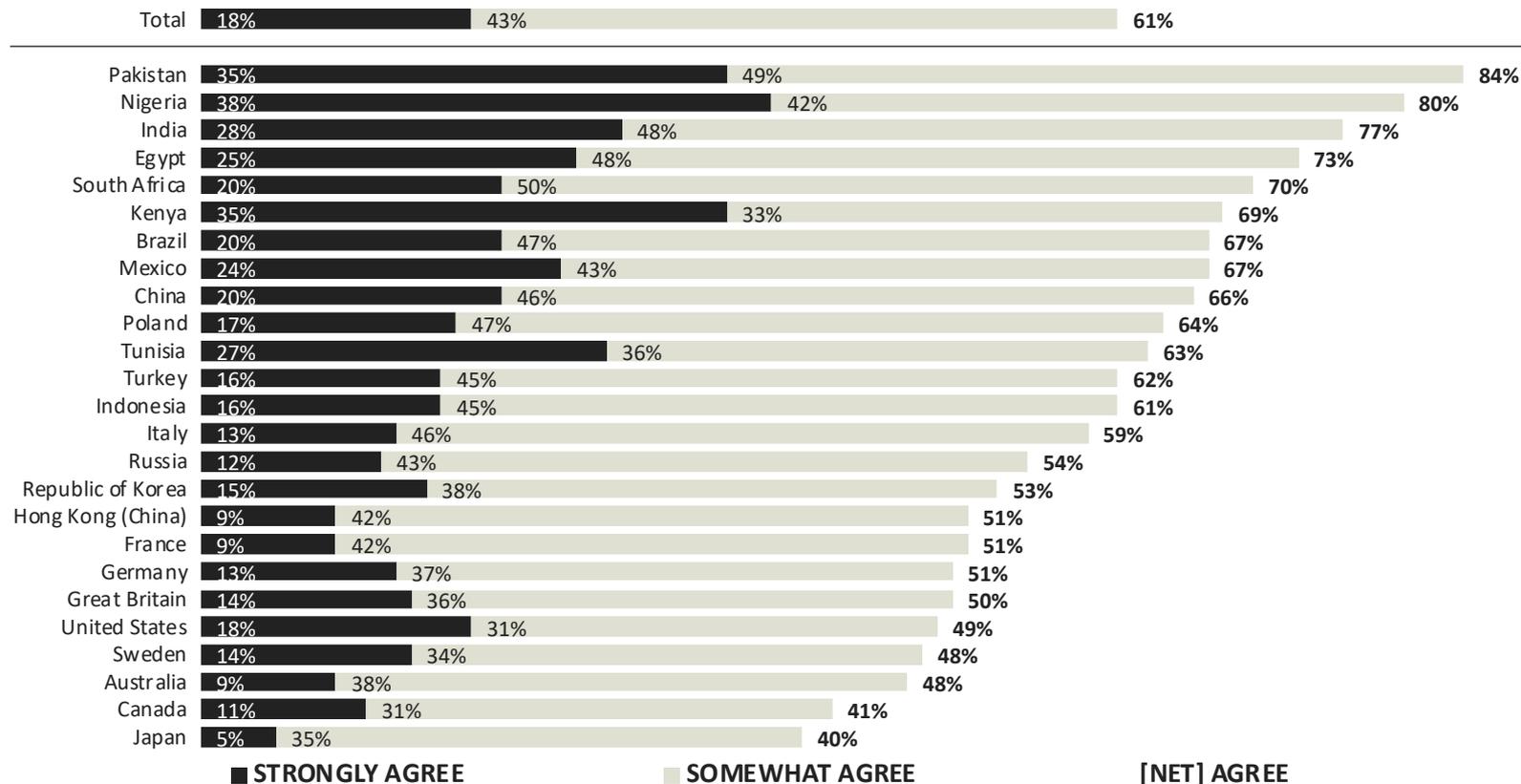
BLOCKCHAIN TECHNOLOGIES SHOULD BE USED IN LOCAL ELECTIONS

On balance, those living in more developed economies such as North America, Europe, & the G-8 tend to be less likely to *agree* that blockchain technologies should be used in local elections.



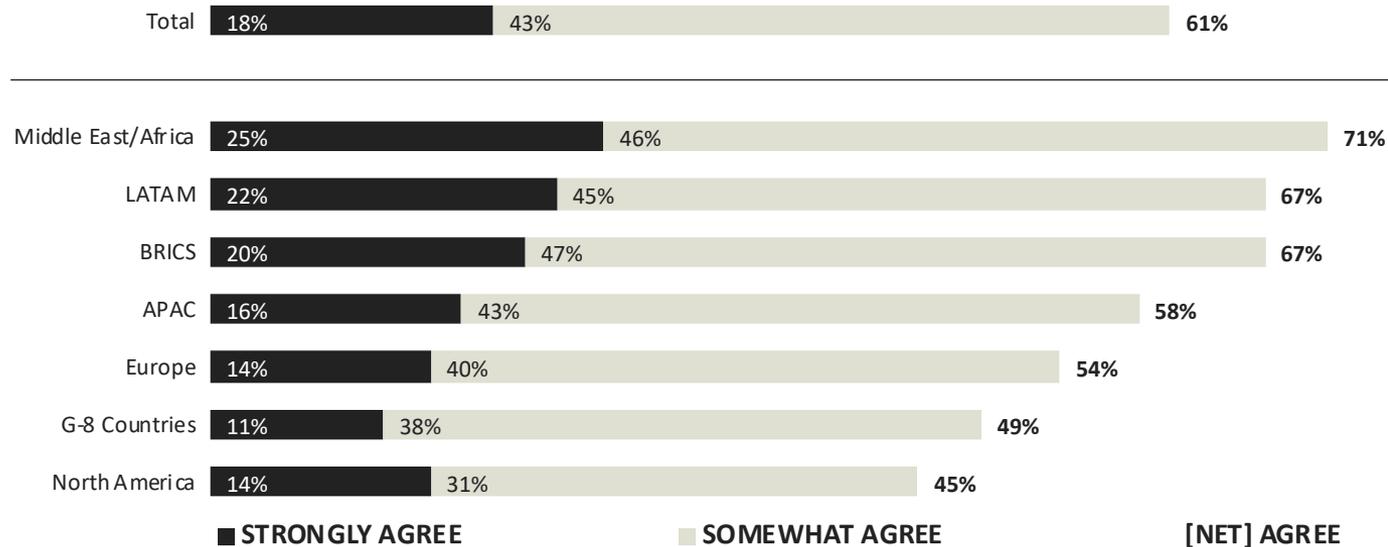
BLOCKCHAIN TECHNOLOGIES WILL DISPLACE TRADITIONAL FINANCIAL SERVICES

Most (61%) with at least minimal knowledge of blockchain technologies expect them to displace traditional financial services, at some point in the future.



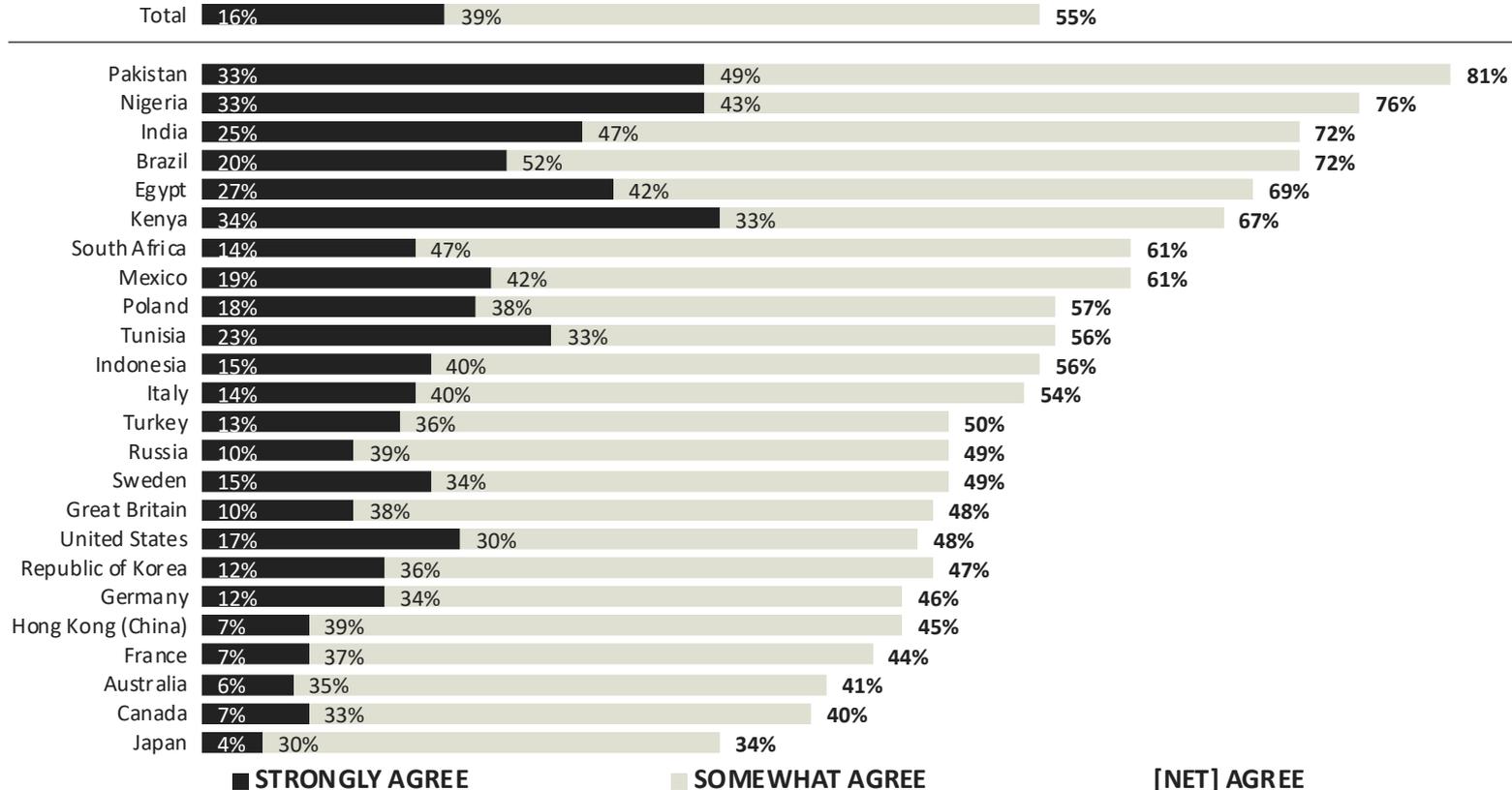
BLOCKCHAIN TECHNOLOGIES WILL DISPLACE TRADITIONAL FINANCIAL SERVICES

There is a stronger belief that blockchain technologies will displace financial services in developing economies such as the Middle East, Africa, LATAM, and BRICS.



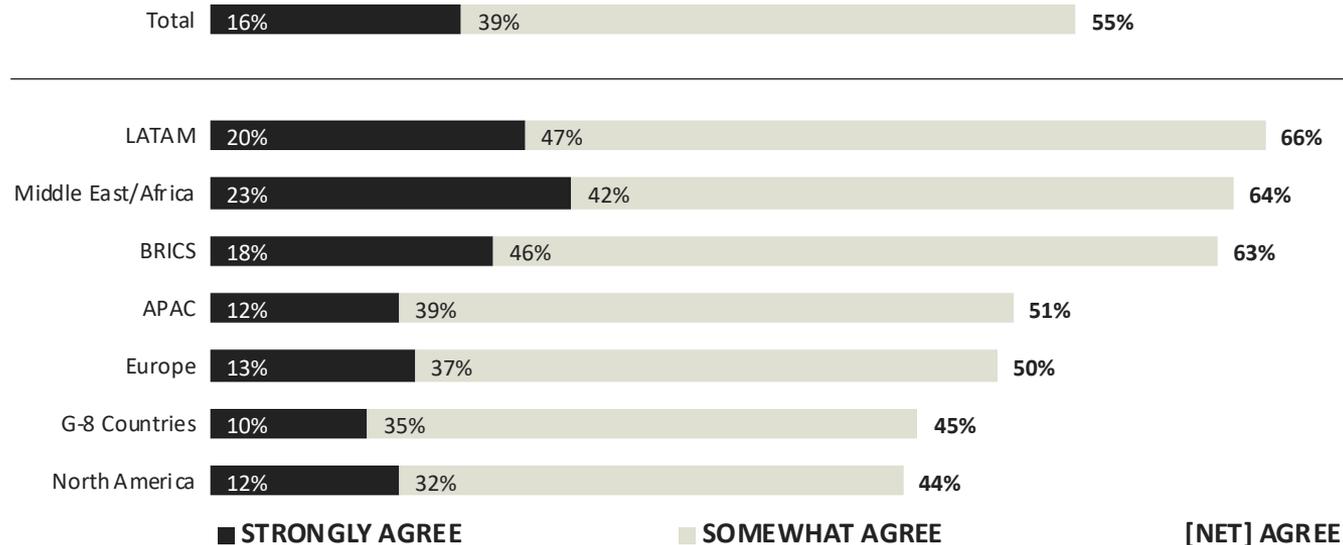
BLOCKCHAIN TECHNOLOGIES WILL DISPLACE TRADITIONAL GOVERNMENT SERVICES

A majority (55%) of those with some degree of awareness of blockchain technologies *agree* that they will eventually displace traditional government services, with a high of 81% in Pakistan and a low of 34% in Japan.



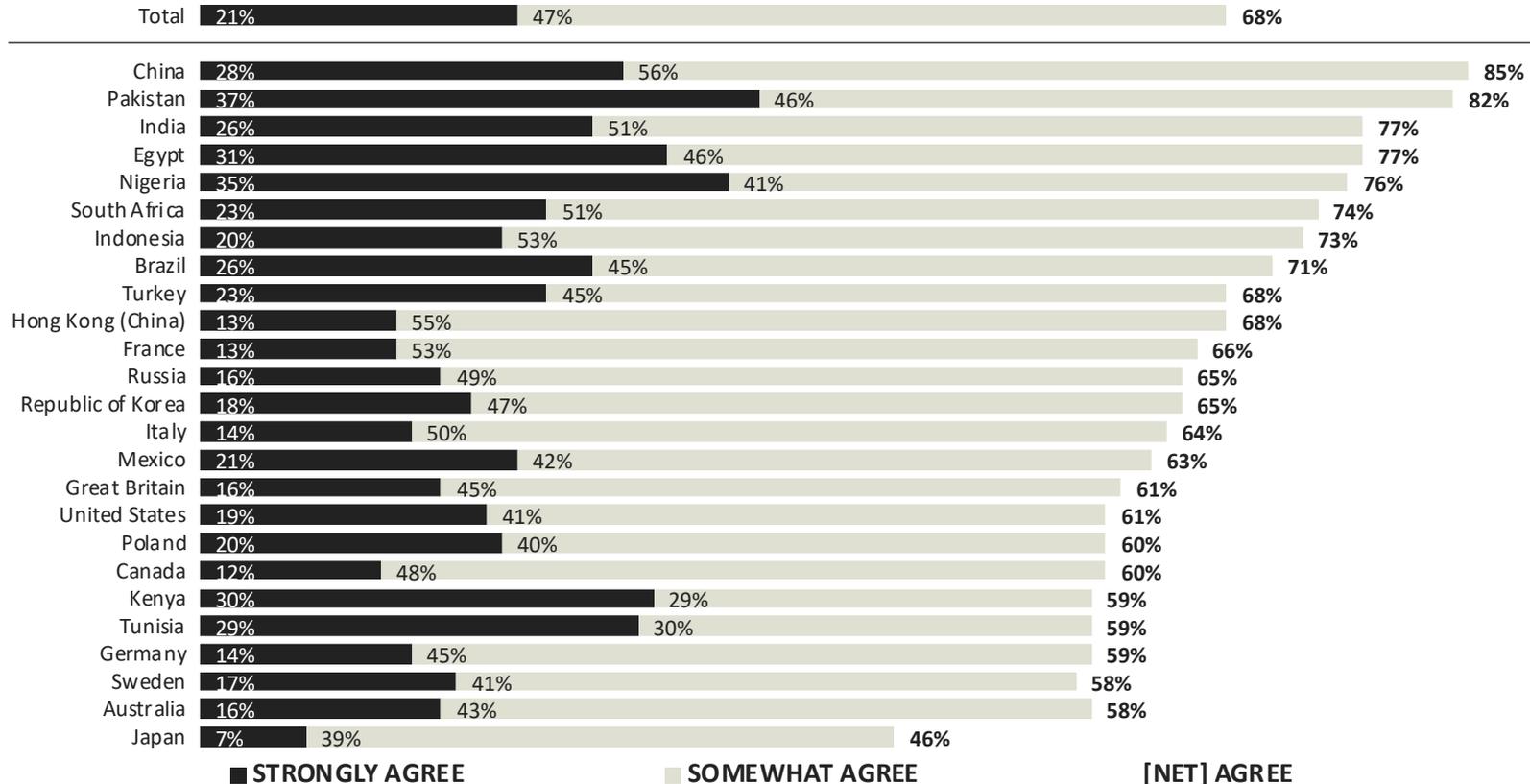
BLOCKCHAIN TECHNOLOGIES WILL DISPLACE TRADITIONAL GOVERNMENT SERVICES

With the exception of North America & the G-8, half or more *agree* that blockchain technologies will eventually displace traditional government services.



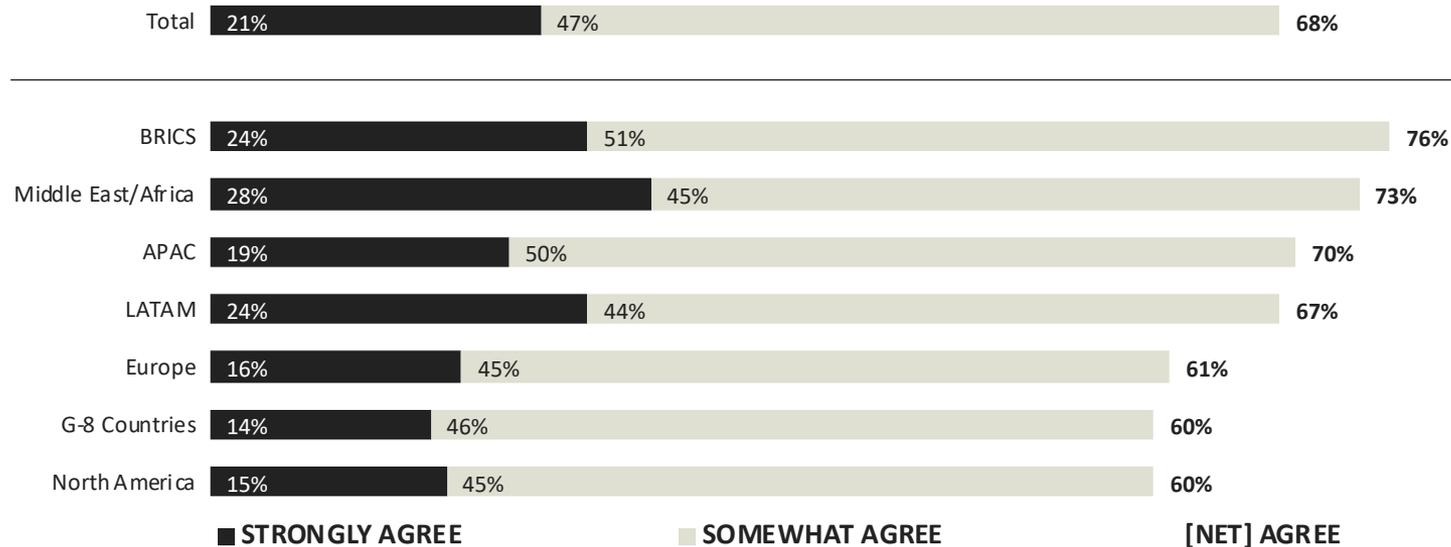
BLOCKCHAIN TECHNOLOGIES WILL AFFECT EVERY SECTOR OF THE ECONOMY

Two-thirds (68%) with some level of knowledge of blockchain technologies *agree* that they will affect every sector of the economy. In fact, majorities in all economies, save for Japan, *agree* with this statement.



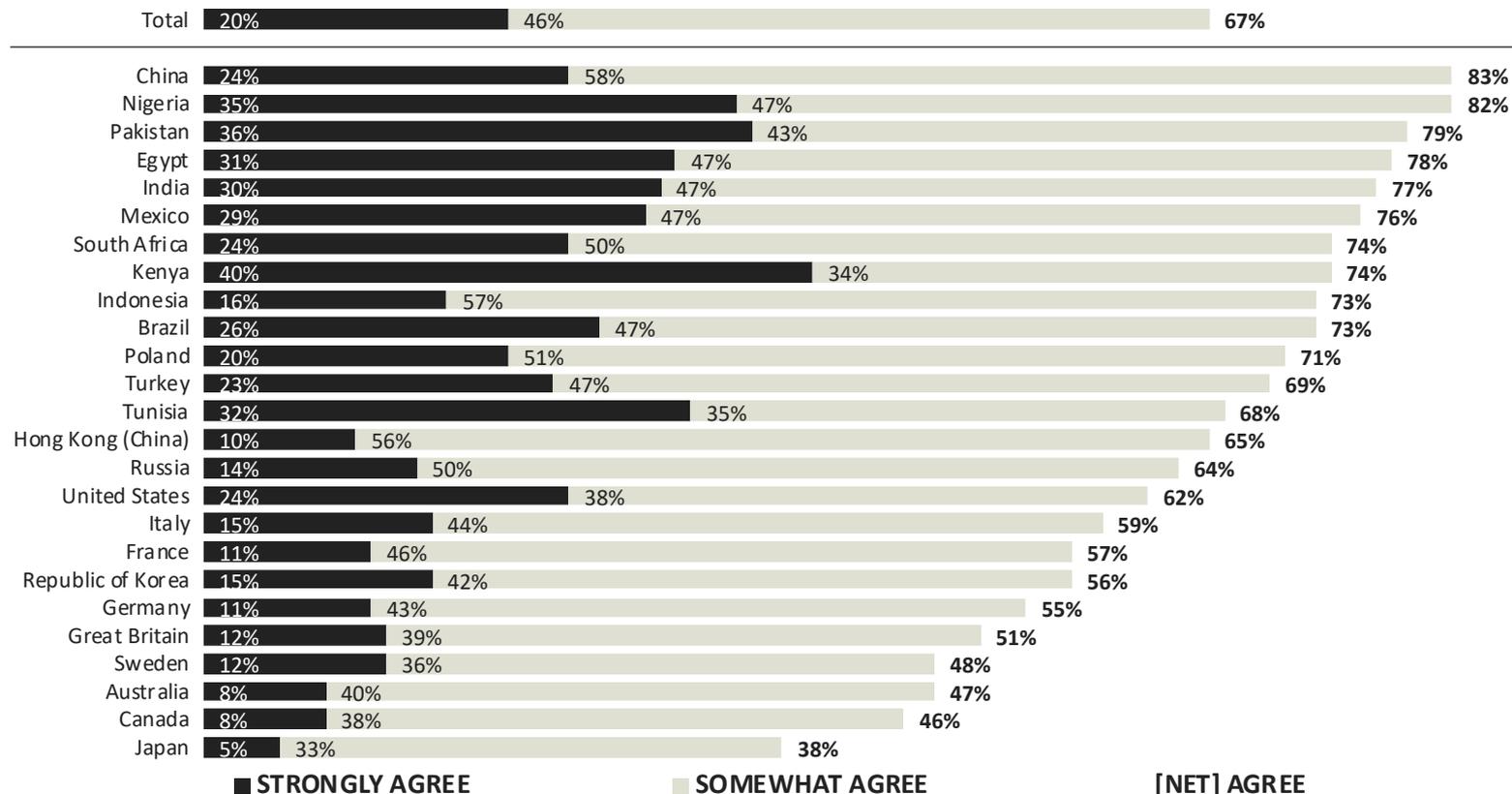
BLOCKCHAIN TECHNOLOGIES WILL AFFECT EVERY SECTOR OF THE ECONOMY

Higher proportions in less developed economies, such as BRICS, the Middle East & Africa, expect blockchain technologies to have an economic impact, in the future.



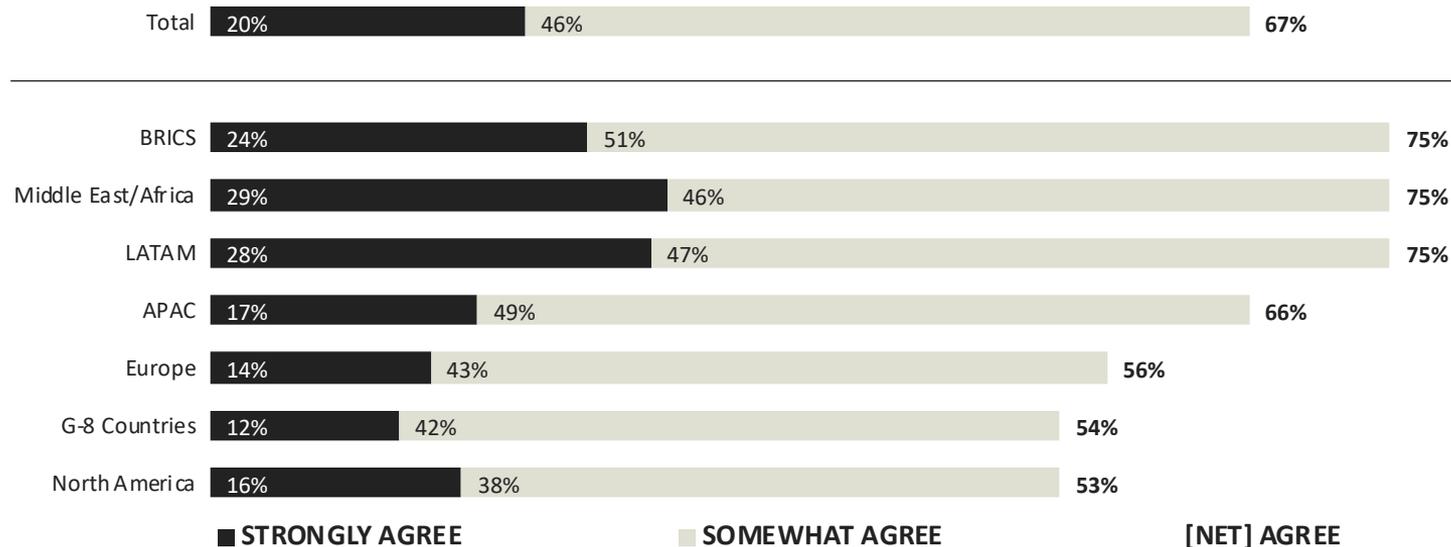
BLOCKCHAIN TECHNOLOGIES WILL HAVE AN IMPACT EQUIVALENT TO THE ADVENT OF THE INTERNET

Two in three (67%) of those who are aware of blockchain technologies expect their impact to rival the advent of the Internet. Agreement is highest in China (83%) & Nigeria (82%); lowest in Japan (38%).



BLOCKCHAIN TECHNOLOGIES WILL HAVE AN IMPACT EQUIVALENT TO THE ADVENT OF THE INTERNET

Around three quarters in developing economies such as BRICS, LATAM, the Middle East & Africa *agree* that the impact of blockchain technologies will rival the Internet compared to slimmer majorities in North America, Europe & the G-8 more generally.



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ABOUT IPSOS

Ipsos is an independent market research company controlled and managed by research professionals. Founded in France in 1975, Ipsos has grown into a worldwide research group with a strong presence in all key markets. Ipsos ranks fourth in the global research industry.

With offices in 89 economies, Ipsos delivers insightful expertise across five research specializations: brand, advertising and media; customer loyalty; marketing; public affairs research; and survey management.

Ipsos researchers assess market potential and interpret market trends. They develop and build brands. They help clients build long-term relationships with their customers. They test advertising and study audience responses to various media and they measure public opinion around the globe.

Ipsos has been listed on the Paris Stock Exchange since 1999 and generated global revenues of €1,780.5 million in 2017.

GAME CHANGERS

At Ipsos we are passionately curious about people, markets, brands and society. We deliver information and analysis that makes our complex world easier and faster to navigate and inspires our clients to make smarter decisions.

We believe that our work is important. Security, simplicity, speed and substance applies to everything we do.

Through specialisation, we offer our clients a unique depth of knowledge and expertise. Learning from different experiences gives us perspective and inspires us to boldly call things into question, to be creative.

By nurturing a culture of collaboration and curiosity, we attract the highest calibre of people who have the ability and desire to influence and shape the future.

“GAME CHANGERS” – our tagline – summarises our ambition.

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ABOUT CIGI

We are the Centre for International Governance Innovation (CIGI): an independent, non-partisan think tank with an objective and uniquely global perspective. Our research, opinions and public voice make a difference in today's world by bringing clarity and innovative thinking to global policy making. By working across disciplines and in partnership with the best peers and experts, we are the benchmark for influential research and trusted analysis.

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