



COUPON FOLLOW

US CONSUMER SECURITY, PRIVACY & VPN USAGE REPORT 2021

CouponFollow saw an influx of VPN discount-related searches starting early March 2020 and witnessed a 142% overall increase in VPN interest compared to the month prior (February 2020). We've continued to see a heightened appetite among US consumers for VPN services throughout 2020 and into 2021, as the pandemic has forced many Americans to work from home.

Before the pandemic, we ran a survey to understand consumer security and privacy concerns, as well as VPN usage, and looked into purchasing and discounting behaviors of providers. We then re-ran part of the survey again in February 2021, focusing on VPN usage after witnessing spikes in VPN searches starting in 2020. The findings were consolidated into this report.

<https://couponfollow.com/research/vpn-report>

KEY FINDINGS

1 CONCERNS OVER PRIVACY AND SECURITY RUN HIGH

Two-thirds (69%) of Americans are concerned about their personal data security from public Wi-Fi. The majority of Americans (64%) are concerned about data security when using the Internet at home, while 65% of Americans worry their ISP might be sharing or selling their medical or financial data.



2 ONE IN THREE AMERICANS USE A VPN, AND IT'S NOT JUST FOR PRIVACY

As many as 35% of Americans use a VPN, and it's not just for privacy. Half of VPN users use it for anonymous browsing (49%), 45% use a VPN for work, and 21% use it for online shopping.

3 THE TURBULENT YEAR 2020 FUELS THE RISE OF VPN USE

More than one in ten (12%) first started using a VPN since the start of the COVID-19 pandemic began, and one in five (21%) installed a VPN due to having to work from home last year.



4 DESPITE INCREASED USAGE, MOST AMERICANS STILL DON'T KNOW WHAT A VPN IS

Most (59%) Americans still don't know what VPN stands for, while 28% falsely think a VPN will protect their device from viruses and malware, and 19% believe a VPN gives them full anonymity online.

5 MANY AMERICANS PAY FOR THEIR VPN AND ARE HAPPY WITH IT

An overwhelming majority (82%) of VPN users are very or somewhat satisfied with their VPN service provider. Of those who pay for their VPN, 52% have received a discounted price on their VPN subscription.



HACKING AND ONLINE FRAUD REMAIN A CAUSE FOR CONCERN



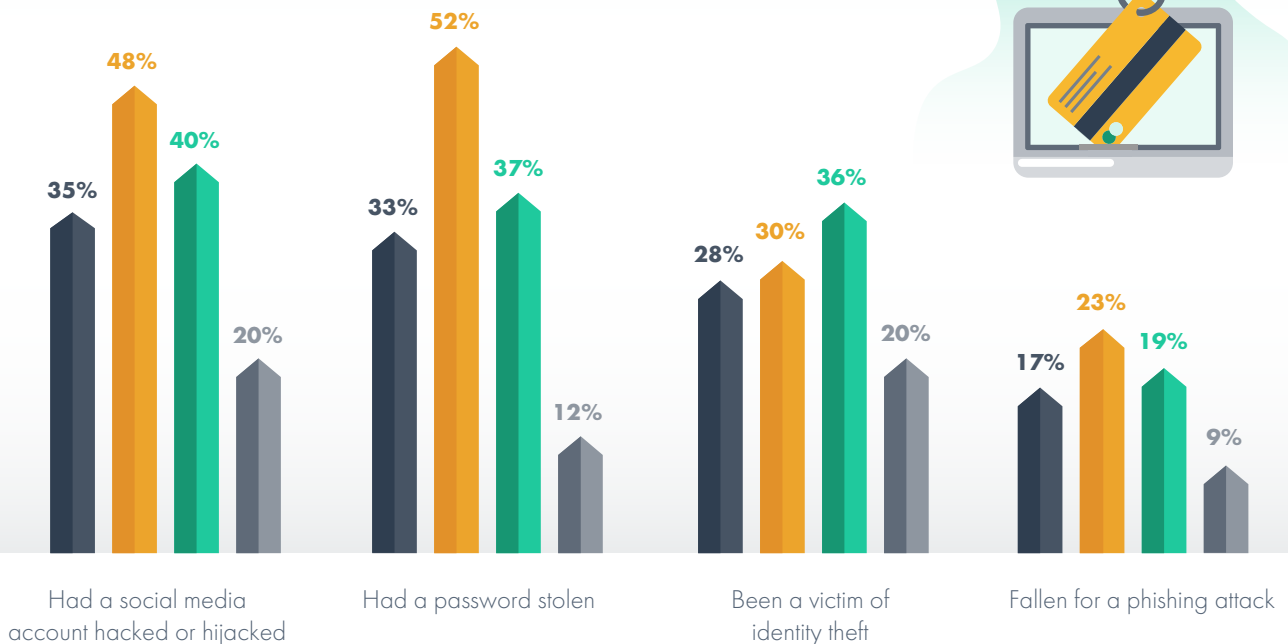
Even though Americans have become more digitally literate and the online services and apps we use are generally safer and more secure, online fraud and hacking remain a considerable problem for many Americans.

According to our survey, more than one-third (35%) of Americans had, or know someone who had, their social media account hacked or hijacked. And this stat jumps to nearly half (48%) for the Millennial generation, who are spending more time online than any other age group.

A further 33% had, or know someone who had, their password stolen and over half (52%) of Millennials & Gen Z had this happen to them or someone they know. It should not come as a surprise then that over a quarter (28%) of Americans were either the victim of identity theft or know someone who was.

Hacking and Online Fraud

■ Overall ■ Millennials & Gen Z ■ Gen X ■ Baby Boomers





This could be why a majority of Americans are concerned about the security of their personal data and their privacy when browsing the web.

Two-thirds of our study participants (69%) are concerned about the security of their data when using public Wi-Fi, and nearly 64% are worried about it when using the Internet at home. Most notably, 77% of Millennials & Gen Z expressed these concerns - more than any other age group.

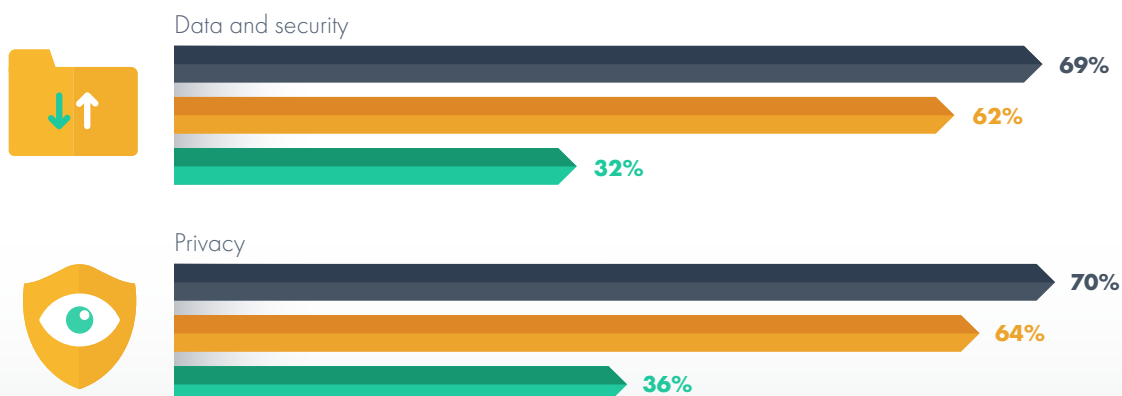
Online privacy is a concern to almost half (47%) of Americans who are worried about their privacy when using public Wi-Fi. Nearly a third (30%) worry about their privacy even when using the Internet in the safety of their homes.

And yet, using the Internet at work doesn't seem to elicit the same level of concern. Whether due to antivirus and firewall protections often in place on employer-issued devices or due to the nature of sites people browse on their work devices, only 32% are worried about their security. Less than one-fifth (18%) are worried about their privacy when browsing the web from a work device.



Locations Where Americans are Most Concerned about Privacy and Data Security

■ On Public Wi-Fi ■ At home ■ At work



Alongside concerns for online safety and privacy, many suspect that their Internet service providers (ISPs) might be sharing or selling their data for money. Most Americans think their ISP may be sharing or selling their medical or financial data (65%), data on their browsing activity (64%), and online shopping history (62%).

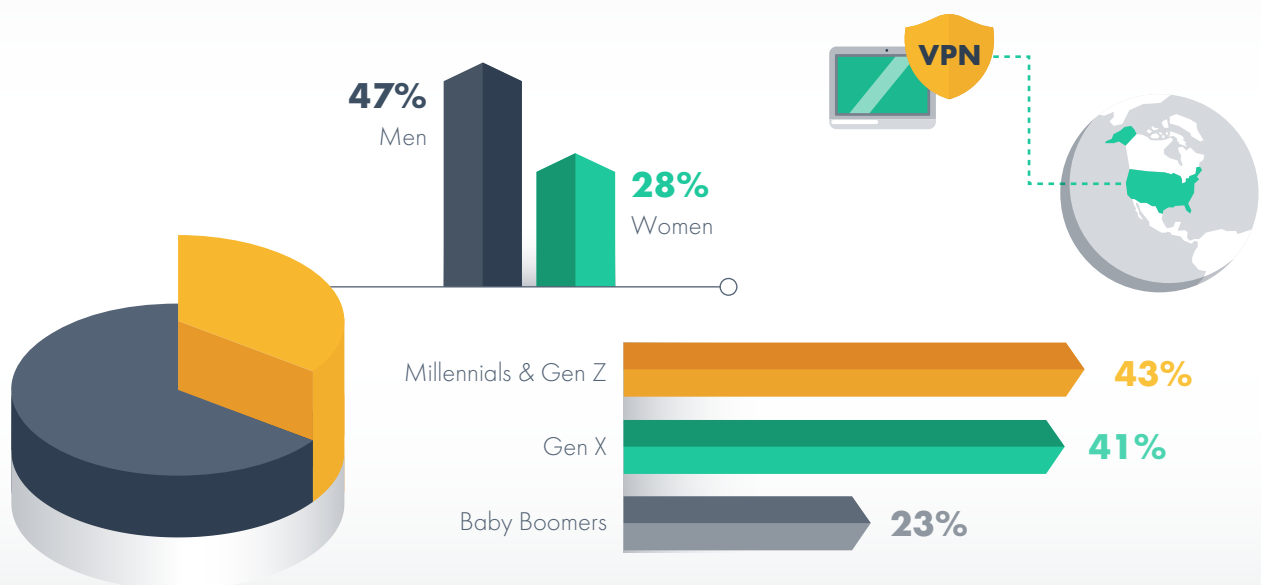
SECURITY, WORK, AND STREAMING: AMERICANS' USE OF VPNS IN 2021



Given all the security and privacy concerns felt across age groups, it's hardly surprising that many Americans are opting for a VPN. Over a third of Americans (35%) use a VPN on a personal or work device to access the Internet.

VPN usage is highest among men, of whom 47% use it compared to 28% of women. It's also predictably higher with the younger generations, who are more likely to use a VPN (43% of Millennials & Gen Z vs. 41% of Gen X). What is rather surprising is that almost one in four Baby Boomers (24%) are VPN users.

One-third of Americans Use a VPN. Here's the Breakdown:



More than half (51%) of our survey respondents who use a VPN report using it often, if not always. Millennials & Gen Z are more likely to have a VPN, but it is in fact Gen Xers who are the keenest users.



57% of Gen X report having the VPN on nearly all the time

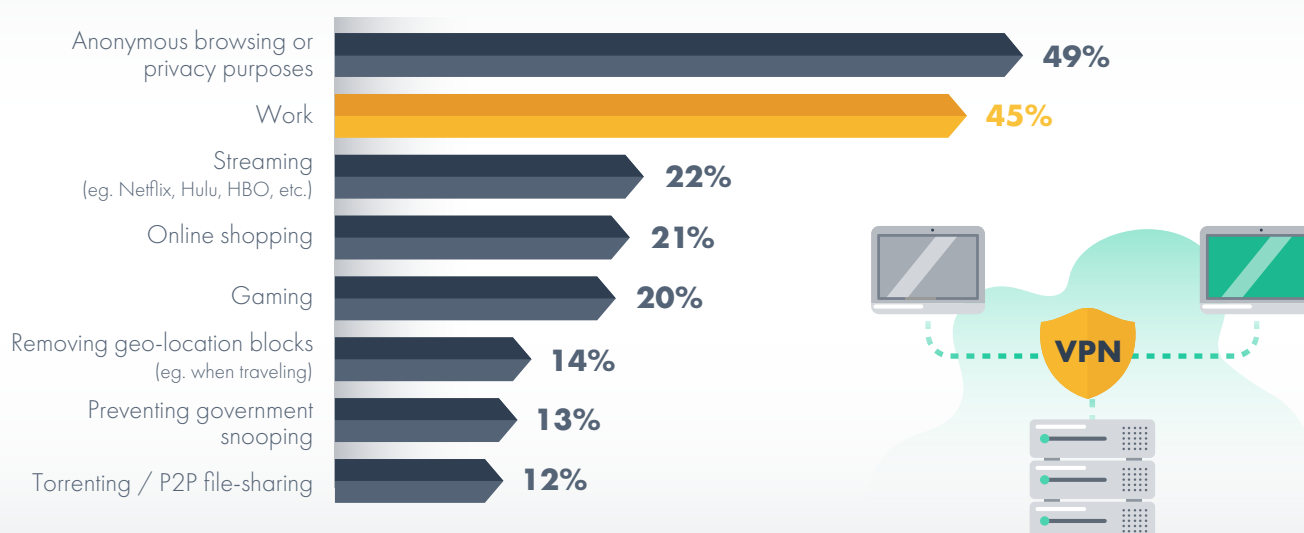


However, it's not just to protect their privacy and security of their personal data. A surprisingly high percentage of Americans use a VPN for work purposes, such as logging in to their workplace IT systems when working from home.

It could well be down to the fact that a lot more people found themselves working remotely in the last year, but with 45% of VPN users utilizing it for work, it was the second most common reason to use a VPN in 2020, just behind anonymous browsing (49%).

A surprisingly low number of people use a VPN for online shopping (21%), especially considering that 62% are concerned about their Internet service provider sharing or selling the data on their online shopping habits.

Why Americans Use a VPN



Other common uses included the more advertised benefits of getting a VPN, such as streaming films and TV shows (22%) and removing geo-location blocks, e.g. when traveling (20%). These percentages might have been higher, but the U.S. has one of the largest Netflix catalogs and is home to most of the world's greatest streaming services, which reduces the need to access geo-blocked content.

Less popular reasons to use a VPN included preventing the government from snooping (14%), torrenting or peer-to-peer file sharing (12%), and gaming (11%). Likely driven by the need to work remotely, a higher percentage of Americans have a VPN on their work computer or device (33%) than on their personal device (27%). Even fewer, only one in five (20%), have a VPN installed on their mobile device.

TURBULENT 2020: HOW PANDEMIC & POLITICS AFFECTED VPN USE



Marred by the COVID-19 pandemic, 2020 saw many Americans forced to stay at home and work remotely. This is likely the reason why one in 10 Americans found out about VPN due to COVID, and 11% started using it during the pandemic.

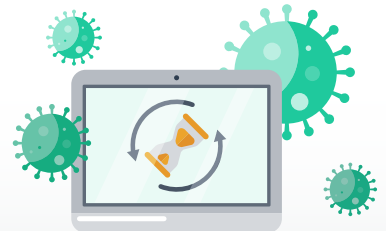
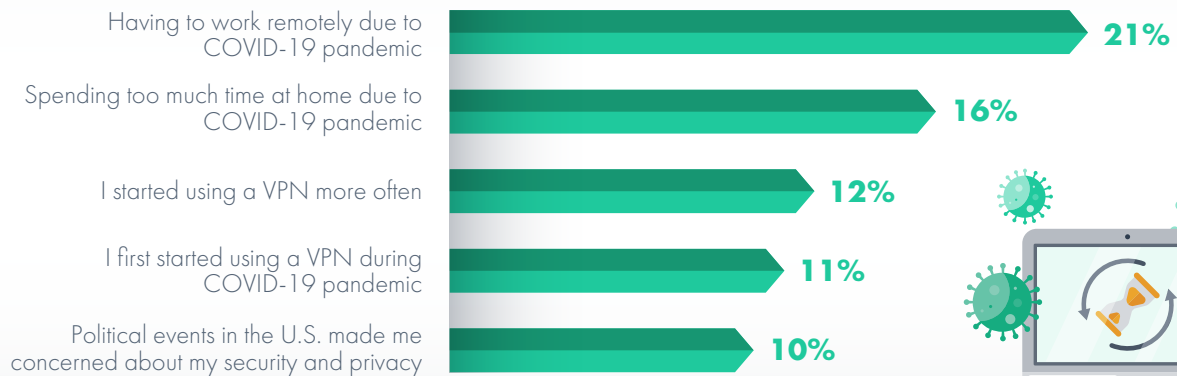
For one in five (21%) of Americans, working from home made them start using a VPN, including 28% of Gen X and 27% of Millennials & Gen Z respondents.

For some 16%, it was spending too much time at home that contributed to their VPN use.

In fact, almost a quarter of Millennials (**23%**) reported using a VPN due to spending more time online when stuck at home.



Reasons for Using a VPN in 2020



It wasn't only the COVID-19 pandemic that 2020 will be remembered for. Political events that unfolded in the U.S. last year made one in 10 Americans (10%) decide to start using a VPN out of concern for their security.

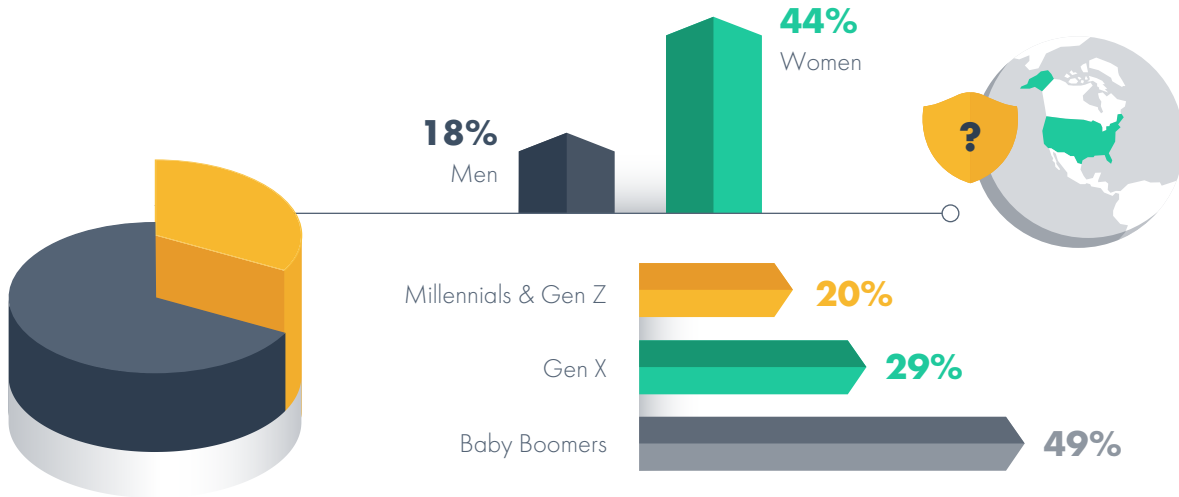
Will this trend continue into our future?

It seems likely. Almost half (46%) of Americans intend to continue using the VPN after the pandemic ends. That share is 59% for Millennials and 51% for Gen X.

VIRTUAL? PRIVATE? NETWORK? WHAT AMERICANS KNOW AND DON'T KNOW ABOUT A VPN



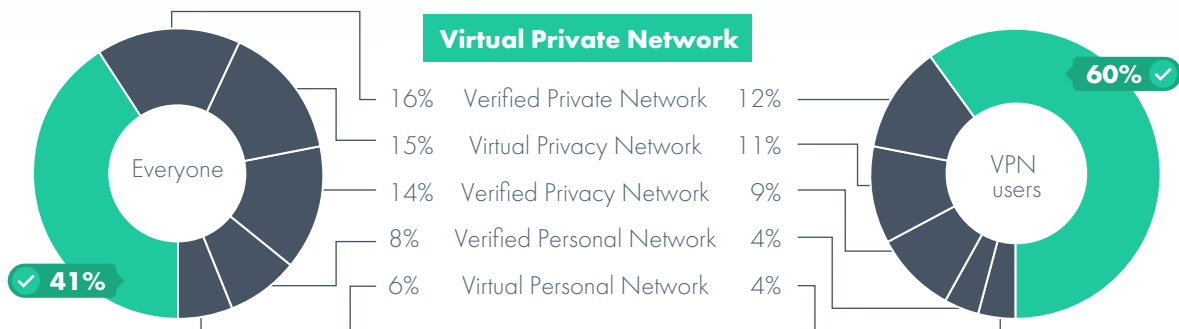
33% of Americans Don't Know What a VPN is.
Here's the Breakdown



Despite the fact 35% of Americans use a VPN, a third (33%) flat out admit they don't know what VPN is in the first place. This is more common among women than among men (44% vs. 18%) and among members of the older generation, as 49% of Baby Boomers in our survey admitted to not knowing what it was.

However, even those that do know something about VPN don't necessarily know what it stands for. Most Americans (59%) don't know that VPN stands for "Virtual Private Network." Curiously enough, even 40% of VPN users don't know exactly what the VPN abbreviation means.

What does VPN stand for?





Blanking on a definition of the term VPN is relatively harmless, but believing a VPN can protect your privacy and personal data in ways that it cannot has more significant implications.

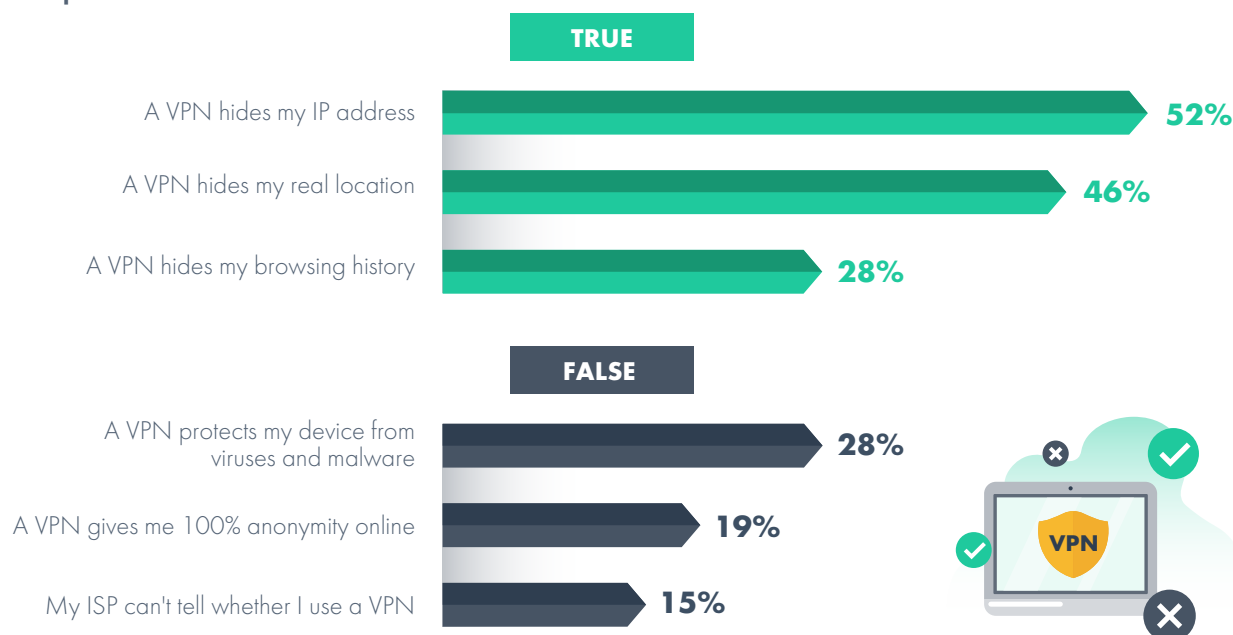
While the majority of Americans (52%) correctly believe that a VPN hides their IP address and almost half (48%) rightfully think it obscures their real location, a significant proportion of people have an exaggerated sense of how secure a VPN is.

For example, roughly 28% falsely assume that a VPN will protect their device from viruses or malware. If you click on a suspicious link, download malicious software, you risk getting your device infected regardless of whether or not you use a VPN.

Almost one in five (19%) believe a VPN gives them full anonymity online, which can often be false. For example, suppose you're using services like Facebook, Twitter, or one of Google's many online services, which require you to log in, your personal information attached to your account will be recorded on their servers.

Finally, 15% think their Internet service provider (ISP) can't tell if they're using a VPN, which is generally not true. While using a VPN restricts how much visibility your ISP has (e.g., they can't see the websites you visit), they will still be able to detect that you connected to a remote server owned by a VPN service—signaling to them that you are using a VPN.

Perceptions about VPNs



What's peculiar about these misconceptions about the level of security and privacy protection a VPN offers are shared equally among those who use a VPN and those who don't.

SECURITY AT A DISCOUNT: MOST VPN USERS DON'T PAY FULL PRICE FOR THEIR VPN SUBSCRIPTION



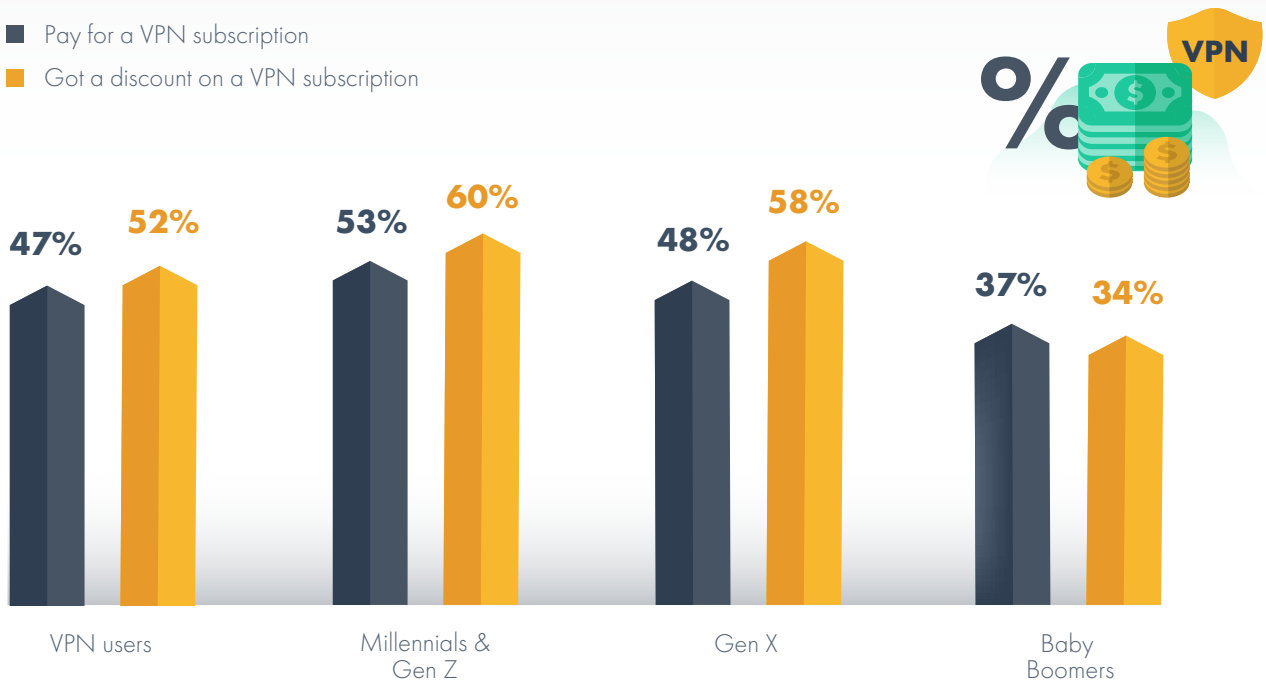
Our original survey asked a series of questions related to their overall expenses put towards using a VPN subscription. Almost one in every two (47%) users of a VPN service pay for their subscription. Out of those, 18% pay every month, while another 29% pay annually or less often.



That being said, American consumers are a savvy bunch, and of those who use a VPN, over half (52%) have ever received a discounted price on their VPN subscription. Millennials and Gen Zers were more likely than older generations to have ever gotten a discount (60%), while Baby Boomers were the least likely (34%) to get a deal.

A Majority of Americans Used a Discount to Purchase a VPN Subscription

- Pay for a VPN subscription
- Got a discount on a VPN subscription



*Yellow bars represent the group of users who indicated they have purchased a VPN suscription



We analyzed the overall sentiment towards specific VPN companies and product offerings.

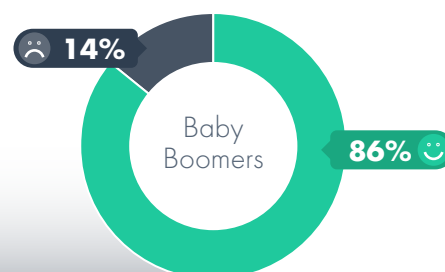
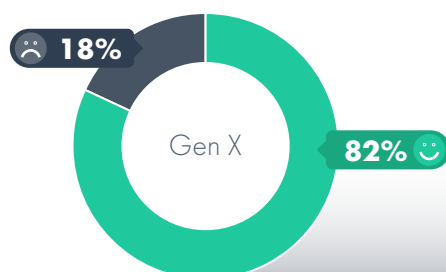
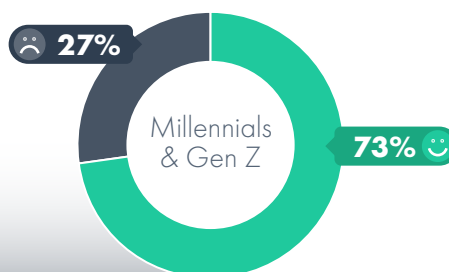
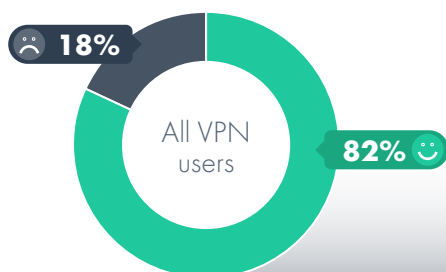
Most VPN users (**82%**) are very or somewhat satisfied with their VPN service provider.



Baby Boomers are most likely to be satisfied (86%), while Millennials and Gen Z were least likely (73%) to be happy with their subscription.



■ satisfied ■ not satisfied



Looking at the brand landscape, the most widely-known VPN services recognized by consumers surveyed Norton Secure VPN, recalled by 34% of respondents, NordVPN (26%), ExpressVPN (16%), and AVG Secure VPN (14%).



NordVPN was most well-known among Gen Zers and Millennials, while Norton Secure VPN was most well-known among Gen Xers and Baby Boomers. In addition to their high brand awareness, NordVPN was also said to be the most widely used among VPN users, followed by Norton Secure VPN, ExpressVPN, and SiteLock VPN.

RESEARCH SUMMARY

Our study suggests that while a VPN is some way off being an essential part of how Americans use the Internet, it's certainly gaining traction, and not just with the younger, internet-savvy generations.



On the backdrop of privacy and security concerns, amplified by the increasing public awareness of the hold the tech industry giants have on how we shop, get around, study, and work, it seems reasonable to suggest that VPN usage is only going to grow.

As gaps in understanding of what a VPN is and how it can protect our privacy and security of our personal data begin to disappear, more consumers are likely to start shopping around for a VPN provider.

The VPN market appears ready for the inflow of consumers. A wide range of providers and an ample supply of free or discounted subscriptions make VPNs a tempting proposition for Americans keen to find additional ways to protect their privacy and security of their data online.

STUDY METHODOLOGY AND LIMITATIONS

SURVEYS

The surveys conducted for this report were carried out with the objective of understanding how Americans view their Internet security and data privacy, as well as VPN (Virtual Private Network) usage.

For the first wave of the study, 1,666 US adults (18+) were surveyed on November 11, 2019. Additionally, a further survey of 1,834 US adults (18+) was carried out in February 2021.

Missing and not applicable responses were excluded from analyses. Percentages are rounded to the nearest whole number.

Survey data have certain limitations related to self-reporting. These limitations include telescoping, exaggeration, and selective memory. We didn't weight our data or statistically test our hypotheses. This was a purely exploratory project examining consumer security and privacy issues and VPN usage.

DEMOGRAPHICS

Across two surveys, about half (49%) of respondents were male; 51% were female. Generationally, Millennials & Gen Z (those aged 18 - 40) comprised 45% of the sample, Gen X (aged 41 to 55) 24%, while 31% were Baby Boomers (aged 56 or older).

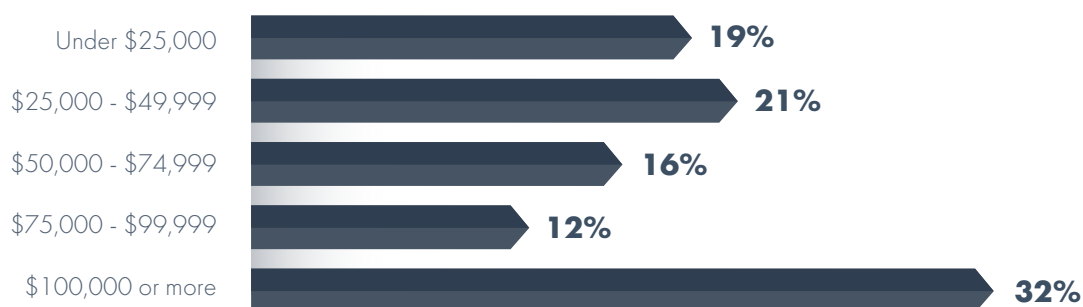
Survey respondents by generation

- Millennials & Gen Z (18-40)
- Gen X (41-55)
- Baby Boomers (56 or older)



About 20% respondents fell into each of the following annual household income categories: <\$25,000, and \$25,000 - <\$50,000. 16% had the income of \$50,000 - <\$75,000, while 12% of respondents had income between \$75,000 to \$100,000. The remaining 32% of respondents' household incomes were \$100,000 and above.

Survey Respondents by Income



FAIR USE STATEMENT

Cybersecurity and data privacy are top of mind for many US consumers and citizens around the world. Feel free to share this research with whomever you think may benefit from it, but be sure your purposes are noncommercial, and please do provide a citation link back to the research on this page so they have access to our full findings and survey methods.

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