SAPIO RESEARCH

Tyto PR

FIDO Alliance Consumer Barometer 2024

August 2024

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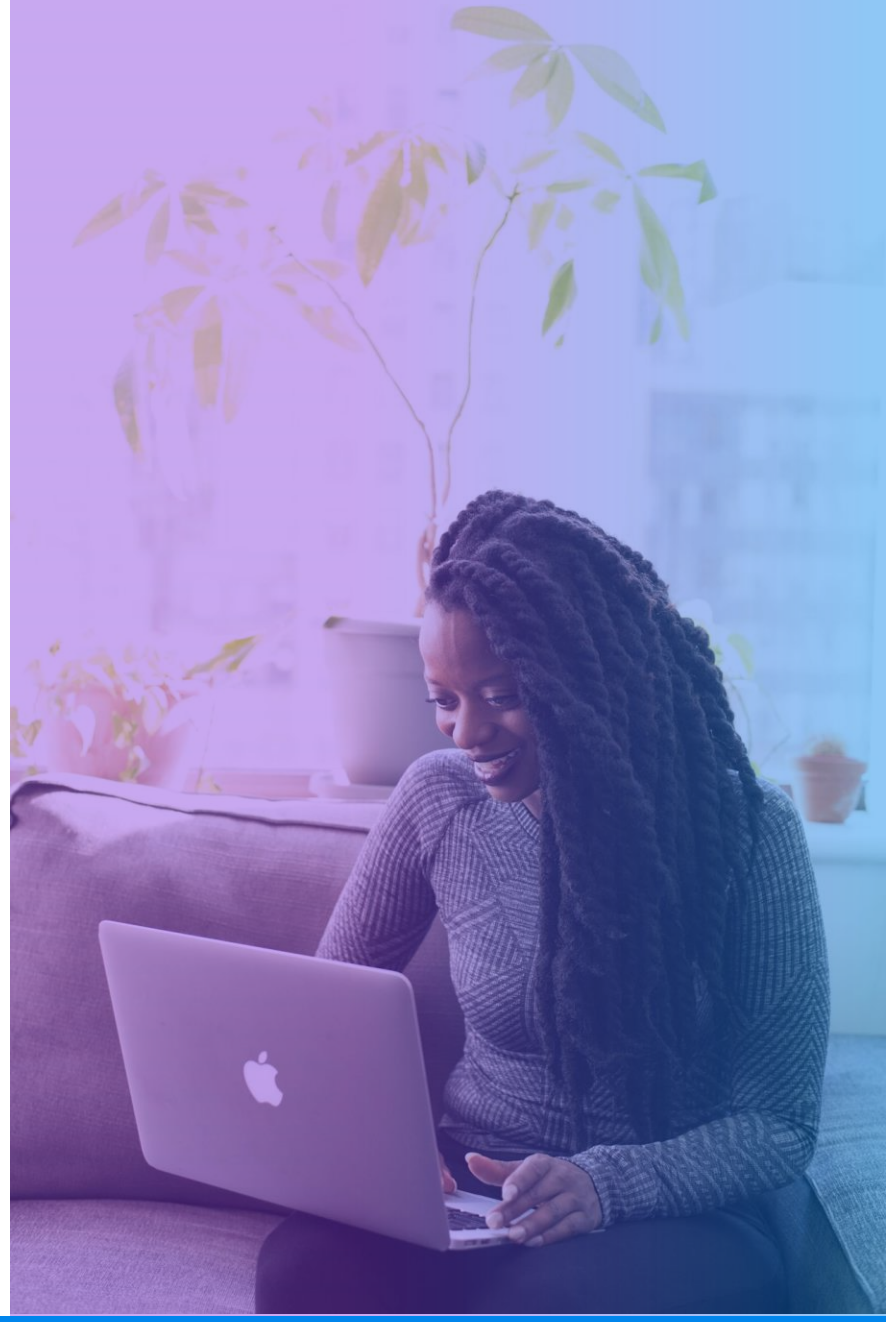
Overview & methodology

Methodology

- The survey was conducted among **10,000 consumers** across UK, France, Germany, US, Australia, Singapore, Japan, South Korea, India and China.

- The interviews were conducted online by Sapio Research in **August 2024** using an email invitation and an online survey.

- At an overall level results are accurate to **± 1.0%** at 95% confidence limits assuming a result of 50%.



The aim was to understand global consumer password habits and experiences with online fraud, compared to results from 2023 and 2022.

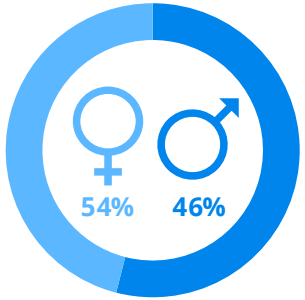
The objectives include:

- Understanding password habits compared to previous years to identify trends and changes in consumer behaviour
- Understanding awareness and attitudes towards passkeys
- Measure the awareness of FIDO Alliance and its goals towards a password-less future
- Understand attitudes towards identity verification

Country of residence

1000 per market

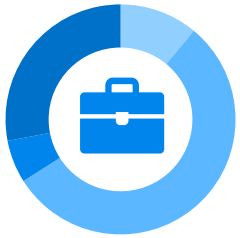
Gender



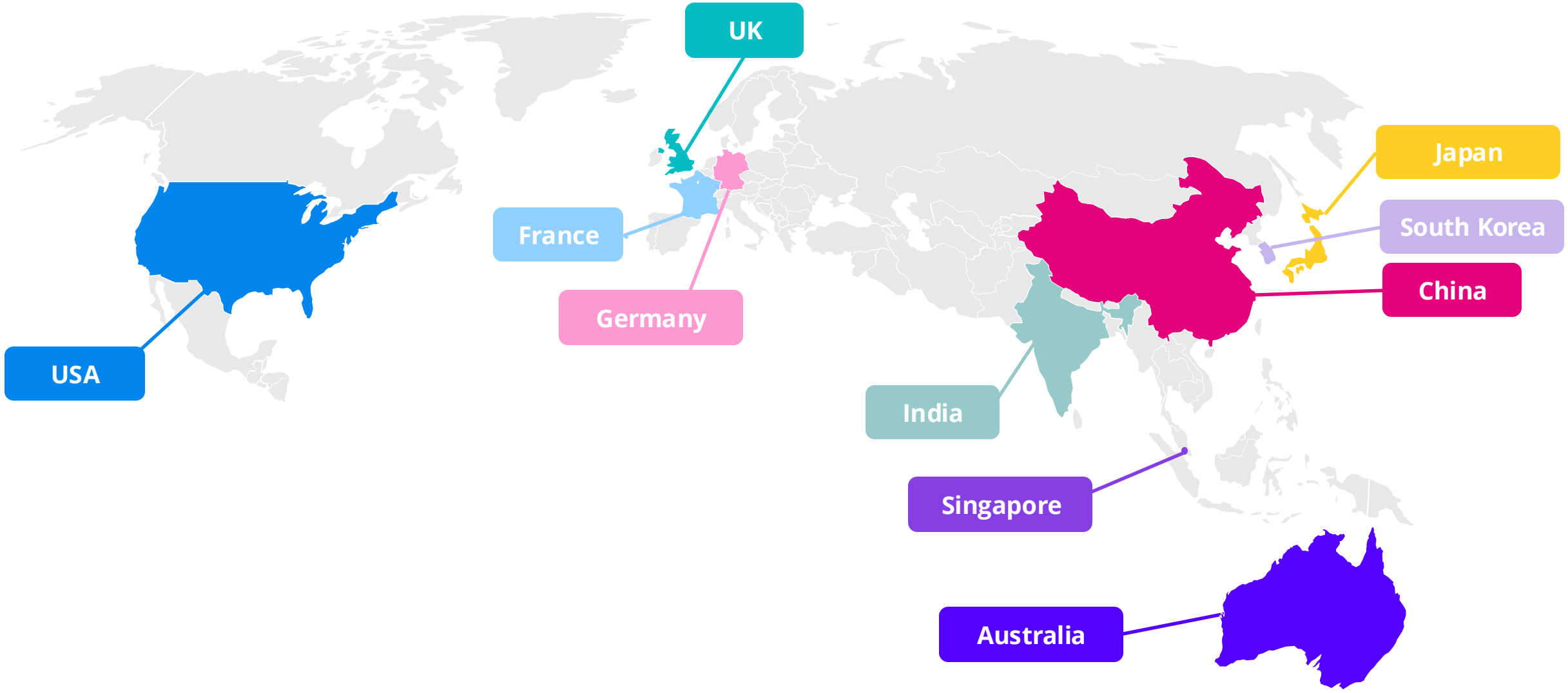
Age

Age range	% of respondents
18 to 24	15%
25 to 34	26%
35 to 44	24%
45 to 54	16%
55 to 64	9%
65+	10%

Employment status



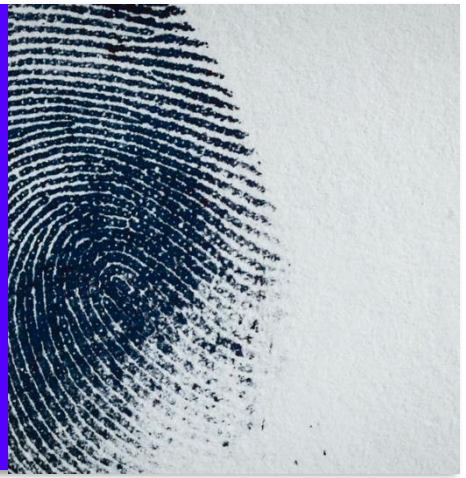
- **11%** were **part-time**
- **55%** were **full-time**
- **6%** were either **self-employed** or had their **own business**
- **28%** were in education, homemakers, caregivers, retired or unemployed


UK
France
Germany
USA
Japan
South Korea
China
India
Singapore
Australia

IT Cost Optimisation
Building an understanding of IT Decision Maker experiences around IT cost optimisation
May 2023
SAPIO RESEARCH
Only 51% of organisations have an exact understanding of their IT software spending
4%
1%
Key takeaways

Similarly to 2023, **16%** are familiar with FIDO Alliance and its goals

Consumers say **biometrics** are the **preferred** method for logging in **(28%)** and believe it's also the **most secure** way of doing so **(29%)**



Passwords remain the most common method of logging in across different accounts and devices, with **financial services** being the exception

More than half (57%) are now **familiar with the concept of passkeys** compared to only **52% in 2023** and **39% in 2022**

1 in 5 (19%) feel **more concerned** about the **reliability and security of systems** following the rise of AI

The most valued attribute when enrolling in a new service or verifying identity online is a **trusted security method (69%)**

1

Passkey awareness has increased in 2024

A larger proportion of people (57%) are familiar with passkeys in 2024 compared to previous years (52% 2023, 39% 2022). With 62% of those familiar, enabling the use of passkeys on their apps and websites. Furthermore, of those familiar with passkeys, 84% are also aware of FIDO. This suggests that consumers are placing more trust in utilising passkeys to access accounts rather than relying upon remembering passwords and password managing systems.

2

Passwords are still the most common way to log in

Despite there being a significant decrease in password usage, passwords are generally still the most common way to log into accounts and devices. Yet, over a quarter (29%) of consumers believe biometrics to be the most secure way to log into their online accounts, apps and smart devices.

3

The importance of identity verification

People feel that it is most important that they can remotely verify their identity when it comes to financial services (81%) and identity documents (80%). Furthermore, the most valued attribute when verifying identity online is a trusted security method (69%), followed by speed of process (52%).

4

Scams are becoming more frequent and sophisticated

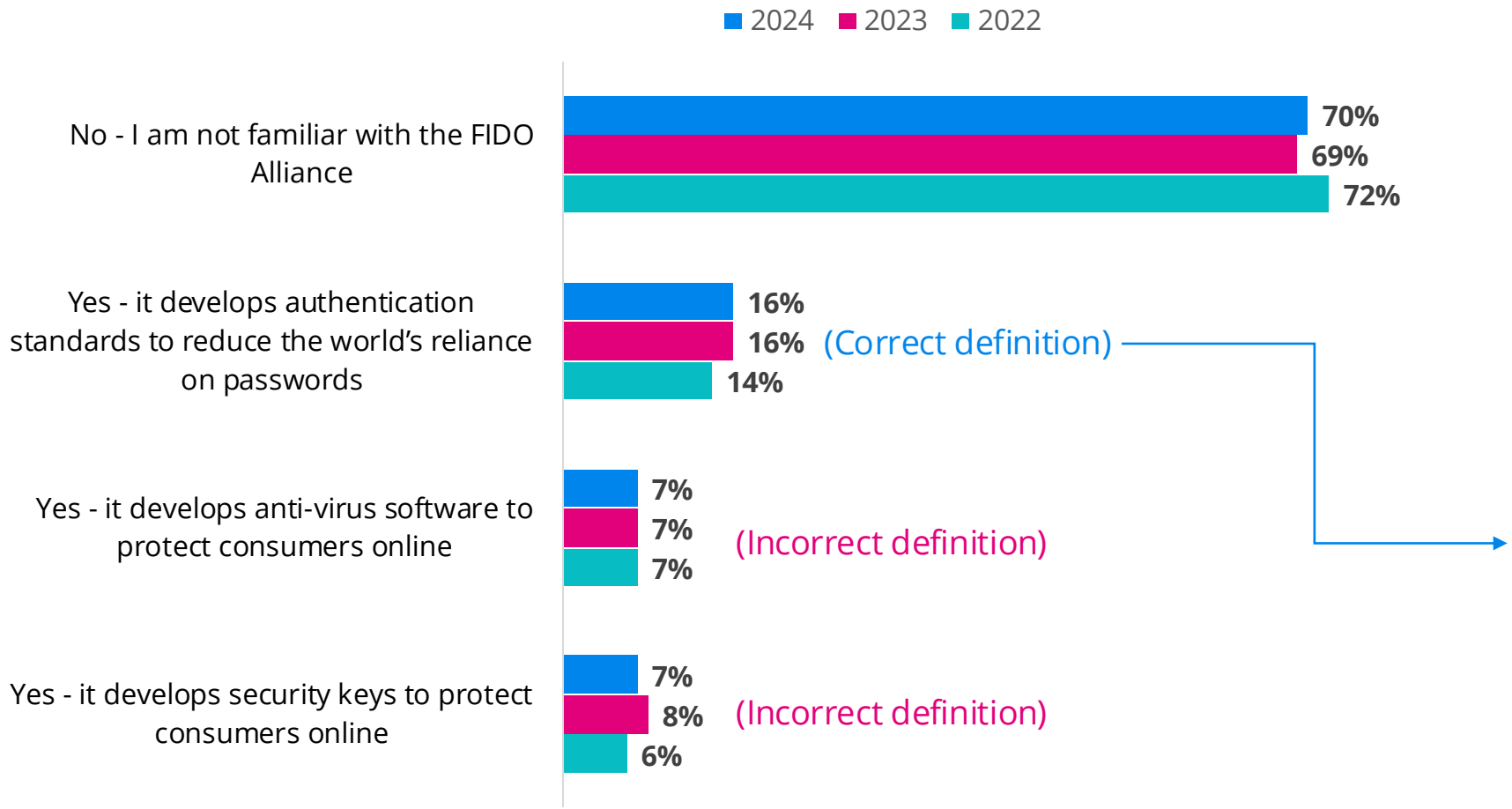
Over half (53%) have seen an increase in the number of suspicious messages they are receiving, with the majority of these messages being received via SMS (53%) or email (49%). A further 51% have reported an increase in the sophistication of these suspicious messages, particularly amongst younger generations.

Main findings

Comparisons to 2022 and 2023

Awareness of FIDO Alliance and it's goals

16% were familiar with the FIDO Alliance and what it is trying to achieve. This is consistent with 2023.



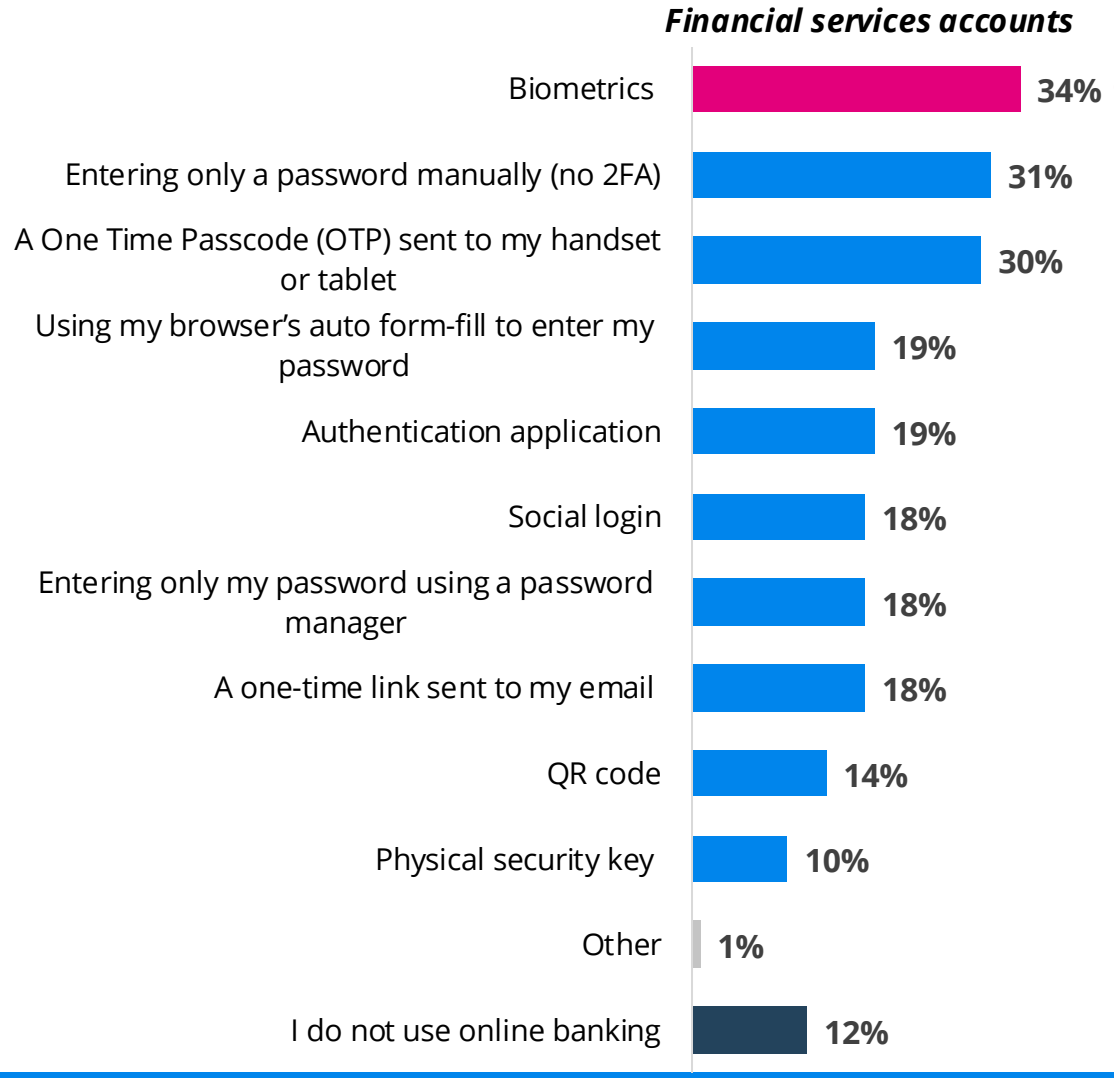
Country	% Correct definition
China	35%
India	34%
Singapore	20%
UK	16%
Germany	14%
South Korea	11%
US	11%
Australia	9%
France	8%
Japan	6%

Q1. Have you heard of the FIDO Alliance and what it is trying to achieve? Select one

Base: 10,000 (2024), 10,010 (2023), 10,044 (2022)

Financial services accounts

34% of consumers have logged into their financial services account by using biometrics in the past 60 days. This increases to **53%** in Singapore.



Country	%
Singapore	53%
South Korea	47%
China	44%
India	42%
UK	35%
Japan	30%
Australia	27%
Germany	23%
US	22%
France	21%

Q2. In what ways have you logged into your financial services accounts in the past 60 days (banking, credit cards, retirement accounts, etc)? Select all that apply

Base: 10,000

Biometrics remains the most common method to log into financial services accounts.

Showing top three ways of logging into financial services year on year

	2024	2023	2022
1st	Biometrics (34%) ★	Biometrics (33%) ★	Entering my password (51%)
2nd	Entering only a password manually (31%) ★	Entering only a password manually / One time passcode sent to my handset or tablet (both 31%) ★	Biometrics (30%)
3rd	One time passcode (OTP) sent to my handset or tablet (30%) ★	Social login (20%)*	One time passcode (OTP) sent to my handset or tablet (28%)

★ *:Significantly different to 2023* ★ *:Significantly different to 2022*

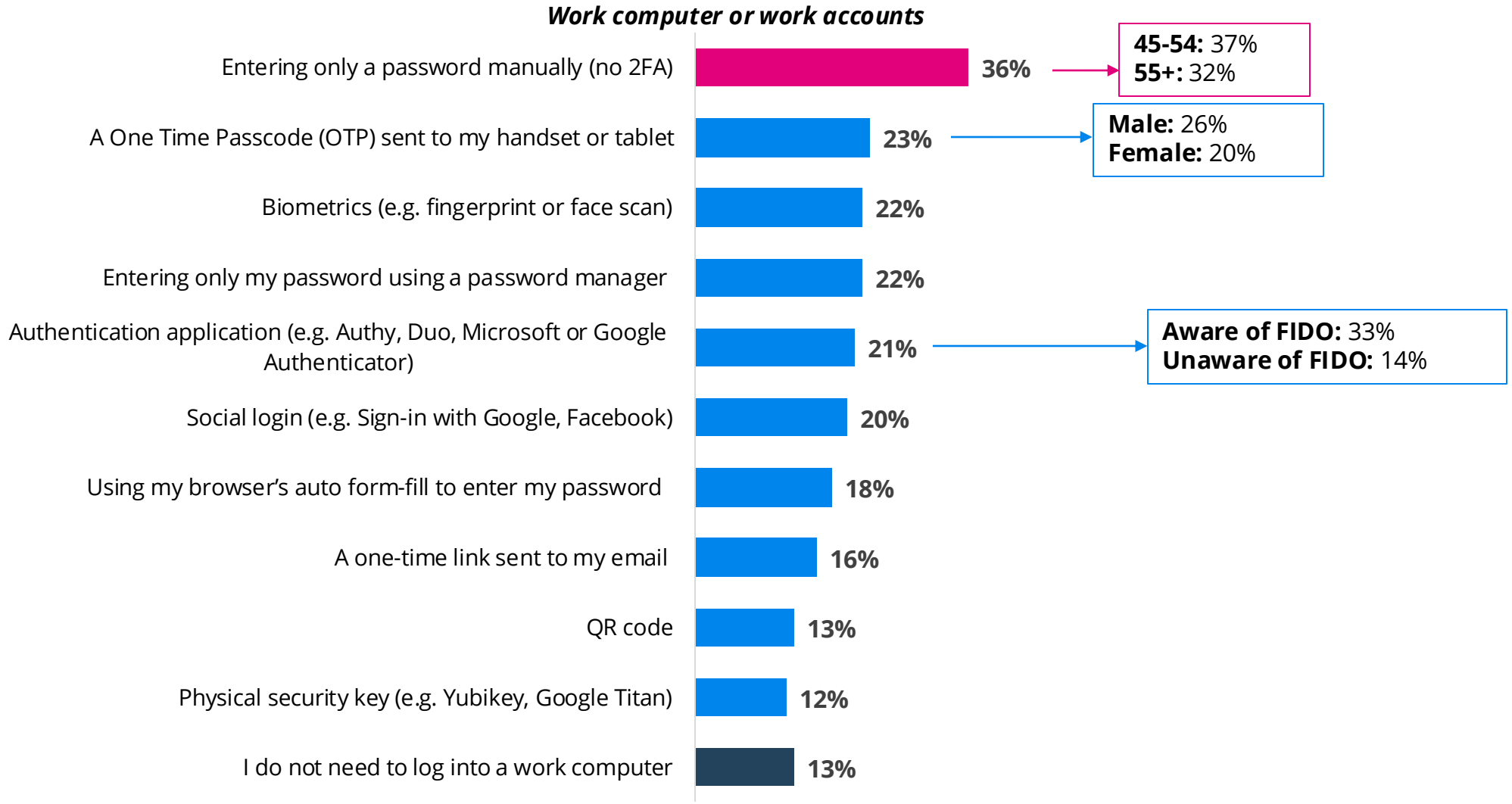
**Please note this option is new this year and cannot be tracked*

Q2. In what ways have you logged into your financial services accounts in the past 60 days? Select all that apply

Base: 10,000 (2024), 10,010 (2023), 10,044 (2022)

Work computer / accounts

36% of consumers have logged into their work computer or account by entering a password manually in the past 60 days



Q3. In what ways have you logged into your work computer or work accounts in the past 60 days? Select all that apply

Base: 10,000

Entering a password manually remains the most common method to log into work accounts

Showing top three ways of logging into work computers year on year

	2024	2023	2022
1st	Entering only a password manually (36%) ★	Entering only a password manually (37%) ★	Entering my password (52%)
2nd	A One Time Passcode (OTP) sent to my handset or tablet (23%)	One time passcode (OTP) sent to my handset or tablet (24%) ★	One time passcode (OTP) sent to my handset or tablet (21%)
3rd	Biometrics (22%) ★	Entering my password using a passord manager (22%) ★	Biometrics (19%)

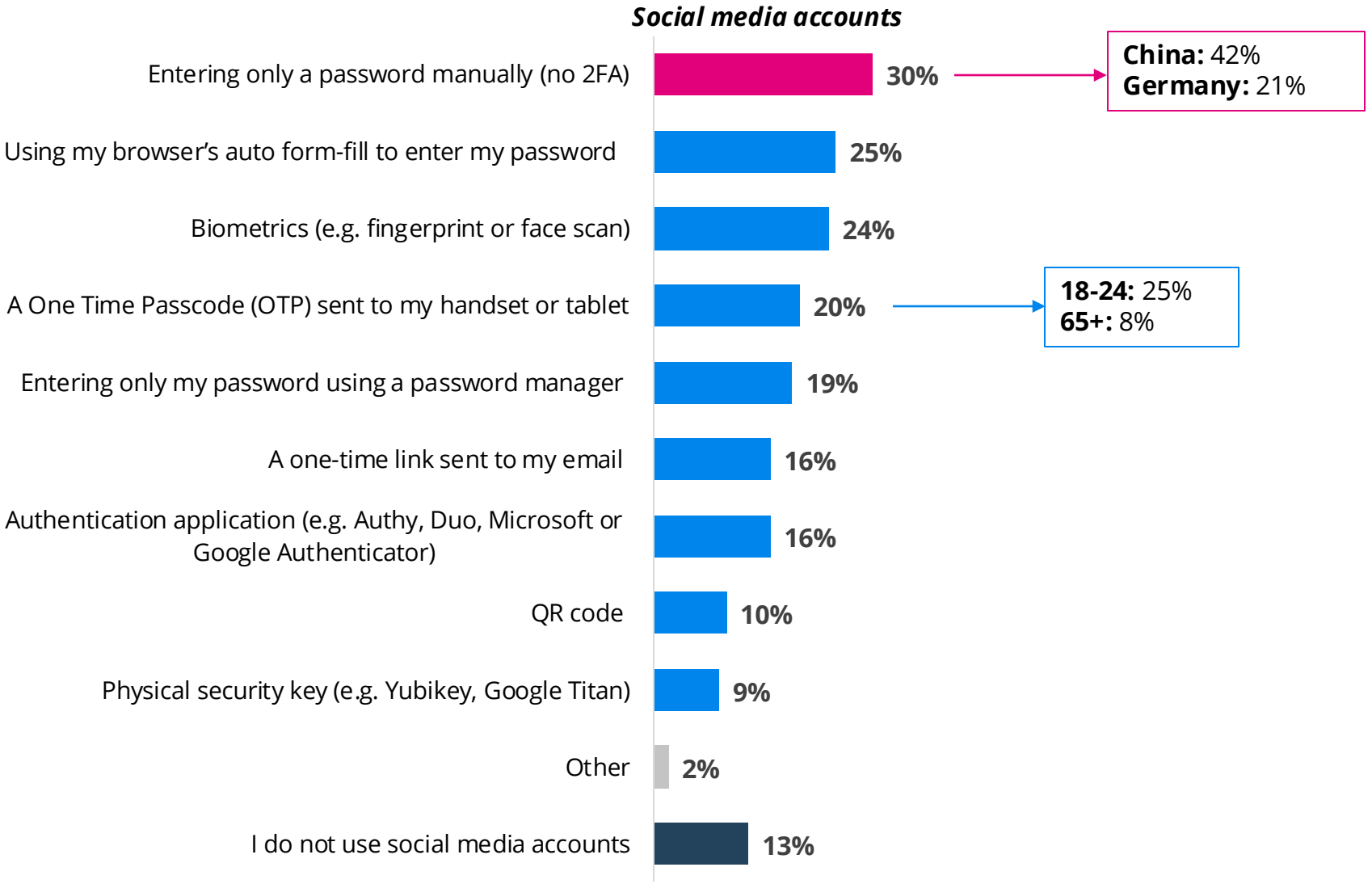
★ :*Significantly different to 2023* ★ :*Significantly different to 2022*

Q3. In what ways have you logged into your work computer or work accounts in the past 60 days? Select all that apply

Base: 10,000 (2024), 10,010 (2023), 10,044 (2022)

Social media accounts

30% of consumers have logged into their social media accounts by entering a password manually in the past 60 days



Q4. In what ways have you logged into your social media accounts in the past 60 days? Select all that apply

Base: 10,000

Entering only a password manually continues to be the most common way to log into social media accounts

Showing top three ways of logging into social media accounts year on year

	2024	2023	2022
1st	Entering only a password manually (30%) ★	Social login* (32%)	Entering my password (37%)
2nd	Using my browser's auto form-fill to enter (25%) ★☆	Entering only a password manually (26%)	Remaining logged into my account (31%)
3rd	Biometrics (24%) ★☆	Using my browser's auto form-fill to enter me password (22%)	Biometrics (18%) ★

★ :*Significantly different to 2023* ☆ :*Significantly different to 2022*

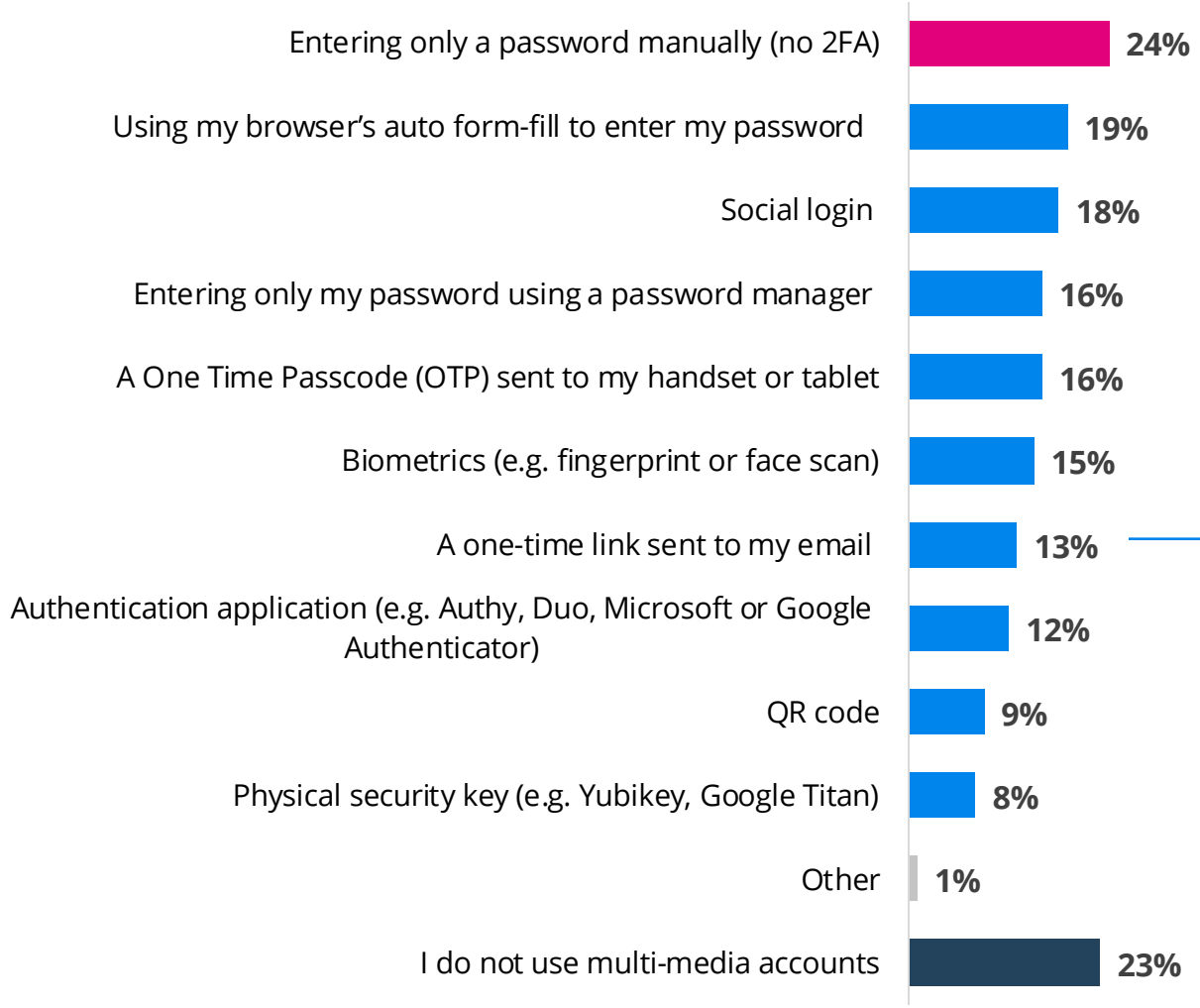
**Q4. In what ways have you logged into your social media accounts in the past 60 days? Select all that apply*

Please note this option was not used this year and cannot be tracked

Base: 10,000 (2024), 10,010 (2023), 10,044 (2022)

Nearly a quarter (24%) of consumers have logged into their media and streaming accounts by entering a password manually in the past 60 days

Media and streaming accounts



Aware of FIDO: 30%
Unaware of FIDO: 21%

Country	%
India	24%
China	20%
Singapore	12%
UK	12%
US	12%
Australia	11%
Germany	10%
South Korea	10%
Japan	9%
France	7%

Q5. In what ways have you logged into your media and streaming accounts, such as Netflix or Spotify in the past 60 days? Select all that apply

Base: 10,000

Entering a password continues to be the most popular way consumers log into their media and streaming accounts, with using a browser's auto form-fill being the second most popular method in **2024, 2023 and 2022 (19%, 20% and 14% respectively).**

Showing top three ways of logging into streaming accounts year on year

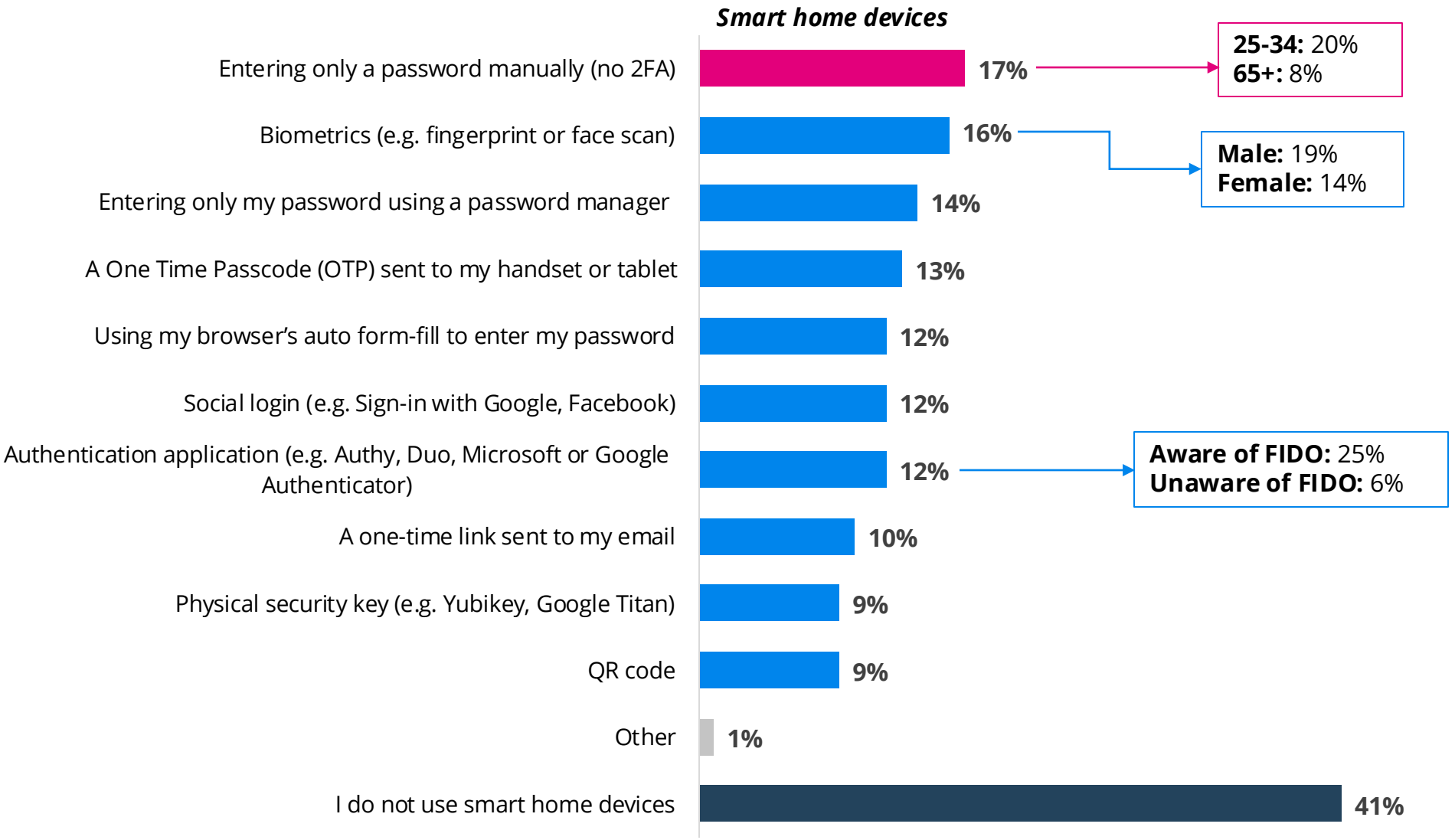
	2024	2023	2022
1st	Entering only a password manually (24%) ★	Entering only a password manually (25%) ★	Entering my password / Remaining logged into my account (both 30%)
2nd	Using my browser's auto form-fill to enter me password (19%) ★	Using my browser's auto form-fill to enter me password (20%) ★	Using my browser's auto form-fill to enter me password (14%)
3rd	Social login (18%)	Social login (19%)	One time passcode sent to my handset or tablet (13%)

★ *:Significantly different to 2023* ★ *:Significantly different to 2022*

Q5. In what ways have you logged into your media and streaming accounts, such as Netflix or Spotify in the past 60 days? Select all that apply

Base: 10,000 (2024), 10,010 (2023), 10,044 (2022)

17% of consumers have logged into their smart home devices by entering a password manually in the past 60 days



Q6. In what ways have you logged into your smart home devices, such as video doorbells, speakers, cars or other internet-connected devices in the past 60 days? Select all that apply

Base: 10,000

Manually entering a password is still the top way consumers log into their smart home devices, with biometrics closely following

Showing top three ways of logging into smart home devices year on year

	2024	2023	2022
1st	Entering only a password manually (17%) ★	Entering only a password manually / Biometrics (both 17%)	Entering my password (22%) ★
2nd	Biometrics (16%) ★	One time passcode sent to my handset or tablet (14%)	Remaining logged into my account (18%)
3rd	Entering my password using a password manager (14%)	Entering my password using a password manager / Social login (both 13%)	Biometrics (14%)

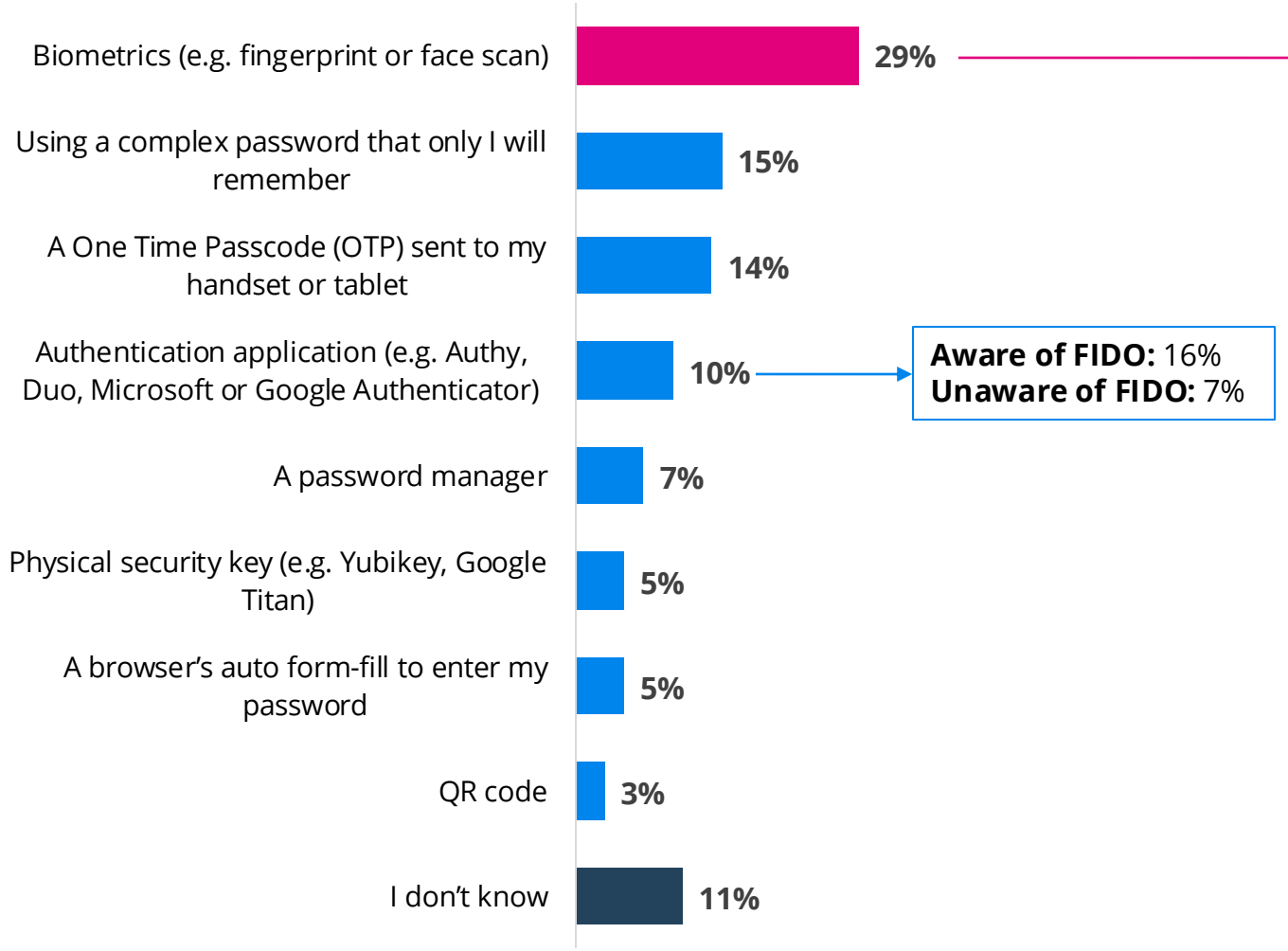
★ *:Significantly different to 2023* ★ *:Significantly different to 2022*

Q6. In what ways have you logged into your smart home devices, such as video doorbells, speakers, cars or other internet-connected devices in the past 60 days? Select all that apply

Base: 10,000 (2024), 10,010 (2023), 10,044 (2022)

Over a quarter (29%) of consumers believe biometrics are the most secure way to log into their online accounts, apps and smart devices

Most secure way to log into online accounts



Country	%
Singapore	39%
Japan	37%
South Korea	35%
UK	31%
China	30%
India	26%
Germany	25%
Australia	24%
US	21%
France	21%

Q7. What do you believe is the most secure way to log in to your online accounts, apps and smart devices? Select one

Base: 10,000

Almost a third (29%) believe that biometrics are the most secure way to log into online accounts, with this belief increasing year-on-year

Showing three most secure ways to log in online accounts year on year

	2024	2023	2022
1st	Biometrics (29%) ★	Biometrics (28%) ★	Biometrics (26%)
2nd	Using a complex password that only I will remember (15%) ★	Using a complex password that only I will remember (16%)	Using a complex password that only I will remember (17%)
3rd	One time passcode sent to my handset or tablet (14%) ★	One time passcode sent to my handset or tablet (15%) ★	One time passcode sent to my handset or tablet (14%)

★ :*Significantly different to 2023* ★ :*Significantly different to 2022*

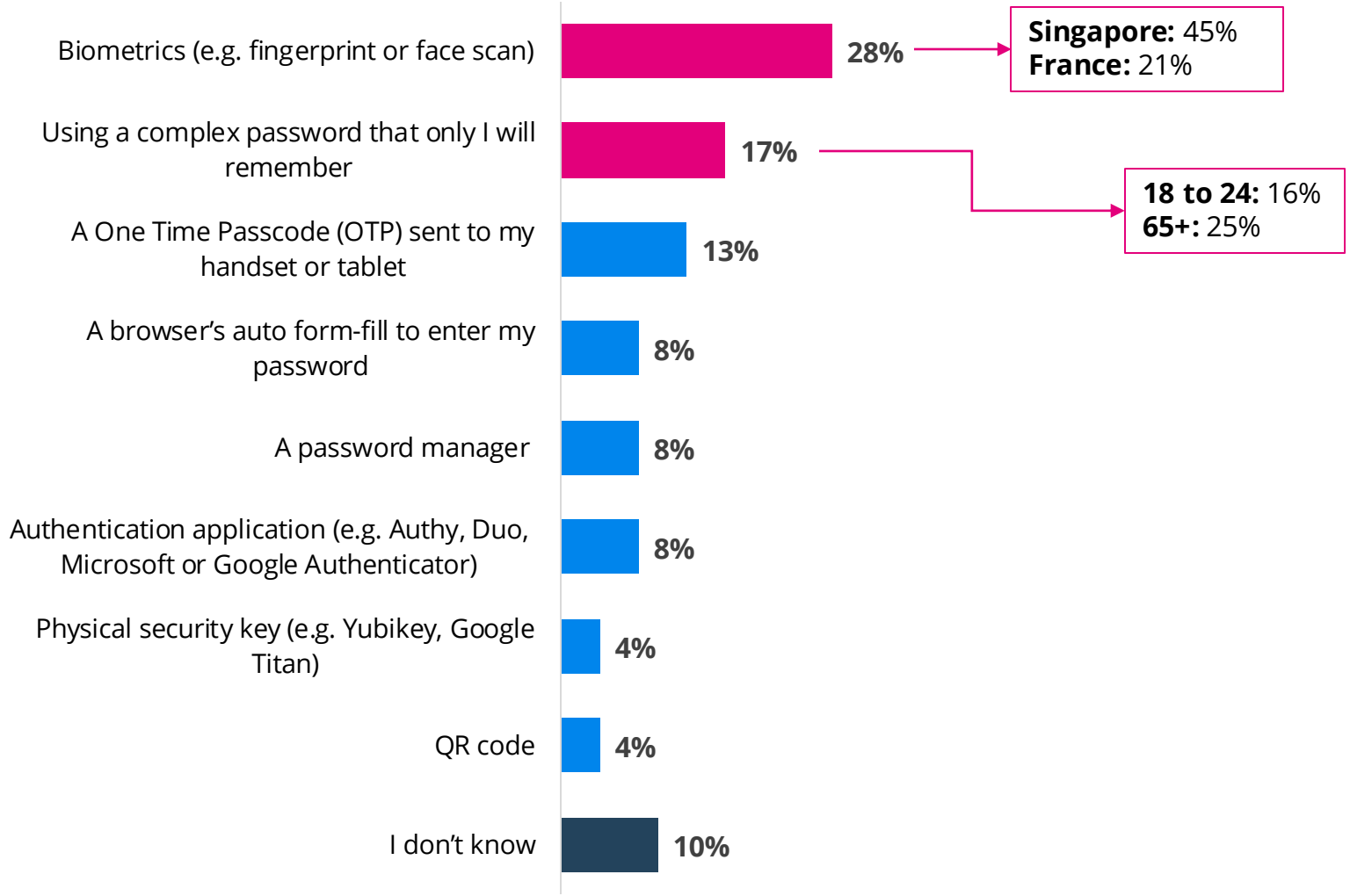
Q7. What do you believe is the most secure way to log in to your online accounts, apps and smart devices? Select one

Base: 10,000 (2024), 10,010 (2023), 10,044 (2022)

Preferred login methods

28% prefer to use biometrics, while **17%** prefer to use passwords that only they will remember

Preferred way to log into online accounts



Q8. What is your preferred way to log in to your online accounts, apps and smart devices? Select one

Base: 10,000

Preferred login methods

Consumers continue to prefer logging into online accounts using biometrics, however, a significant number **(17%)** still uses complex passwords

Showing top three ways of logging into social media accounts year on year

	2024	2023	2022
1st	Biometrics (28%) ★	Biometrics (27%) ★	Biometrics (24%)
2nd	Using a complex password that only I will remember (17%)	Using a complex password that only I will remember (17%)	Using a complex password that only I will remember (18%)
3rd	One time passcode sent to my handset or tablet (13%) ★	One time passcode sent to my handset or tablet (14%) ★	One time passcode sent to my handset or tablet (12%)

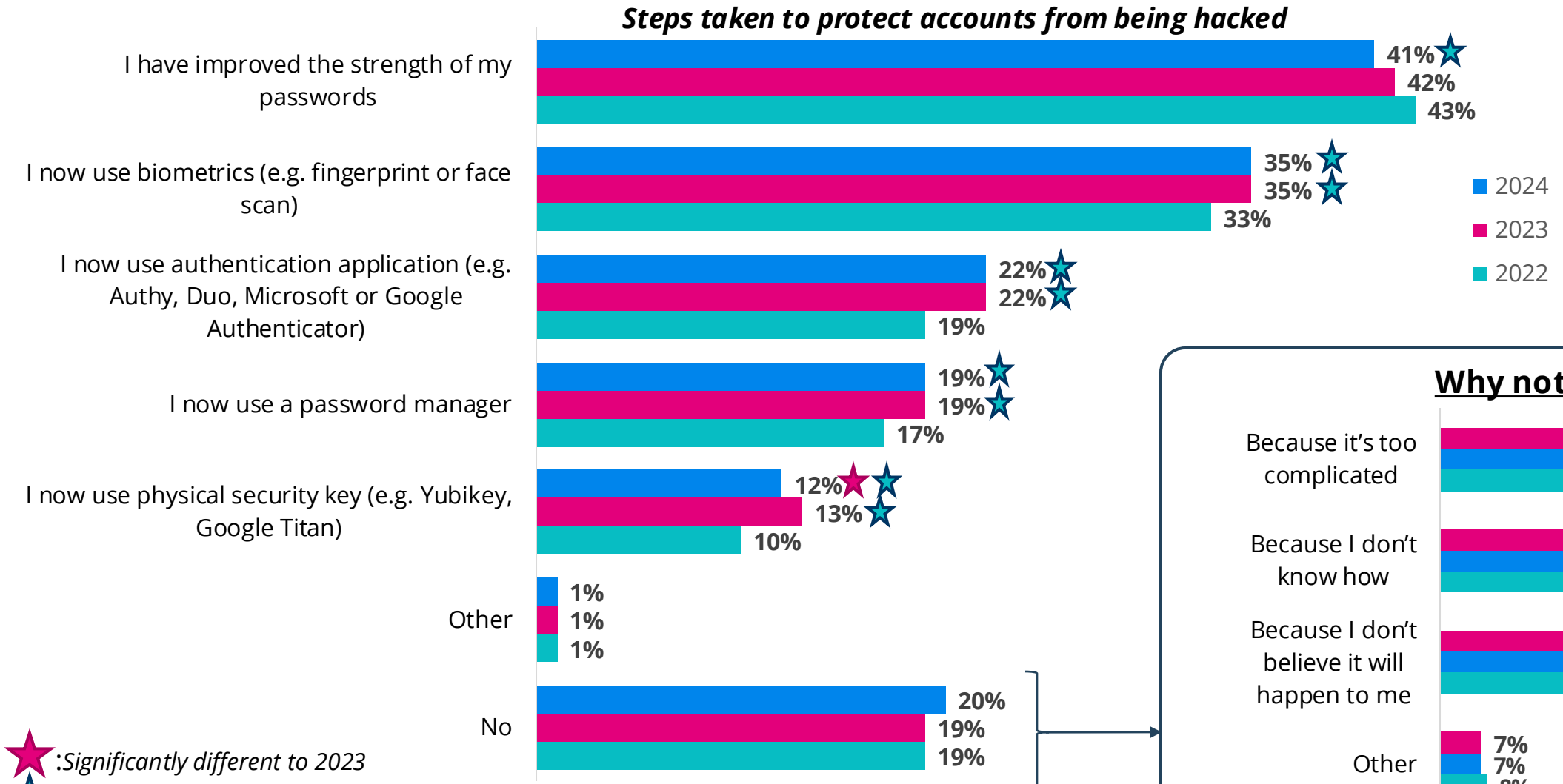
★ :*Significantly different to 2023* ★ :*Significantly different to 2022*

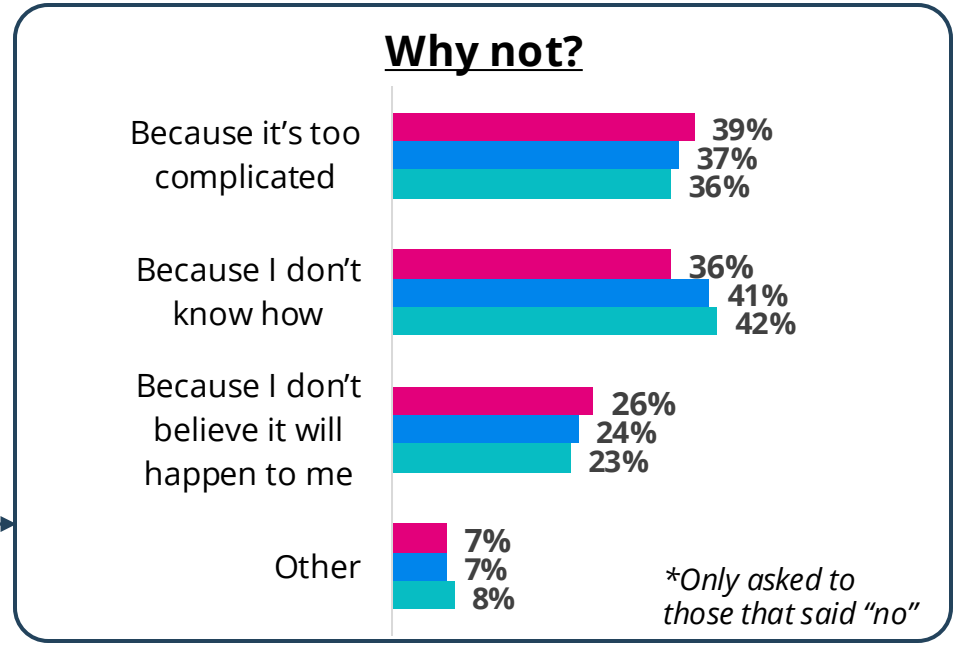
Q8. What is your preferred way to log in to your online accounts, apps and smart devices? Select one

Base: 10,000 (2024), 10,010 (2023), 10,044 (2022)

Steps taken for account protection

41% have improved the strength of their passwords to protect their accounts from being hacked or compromised.

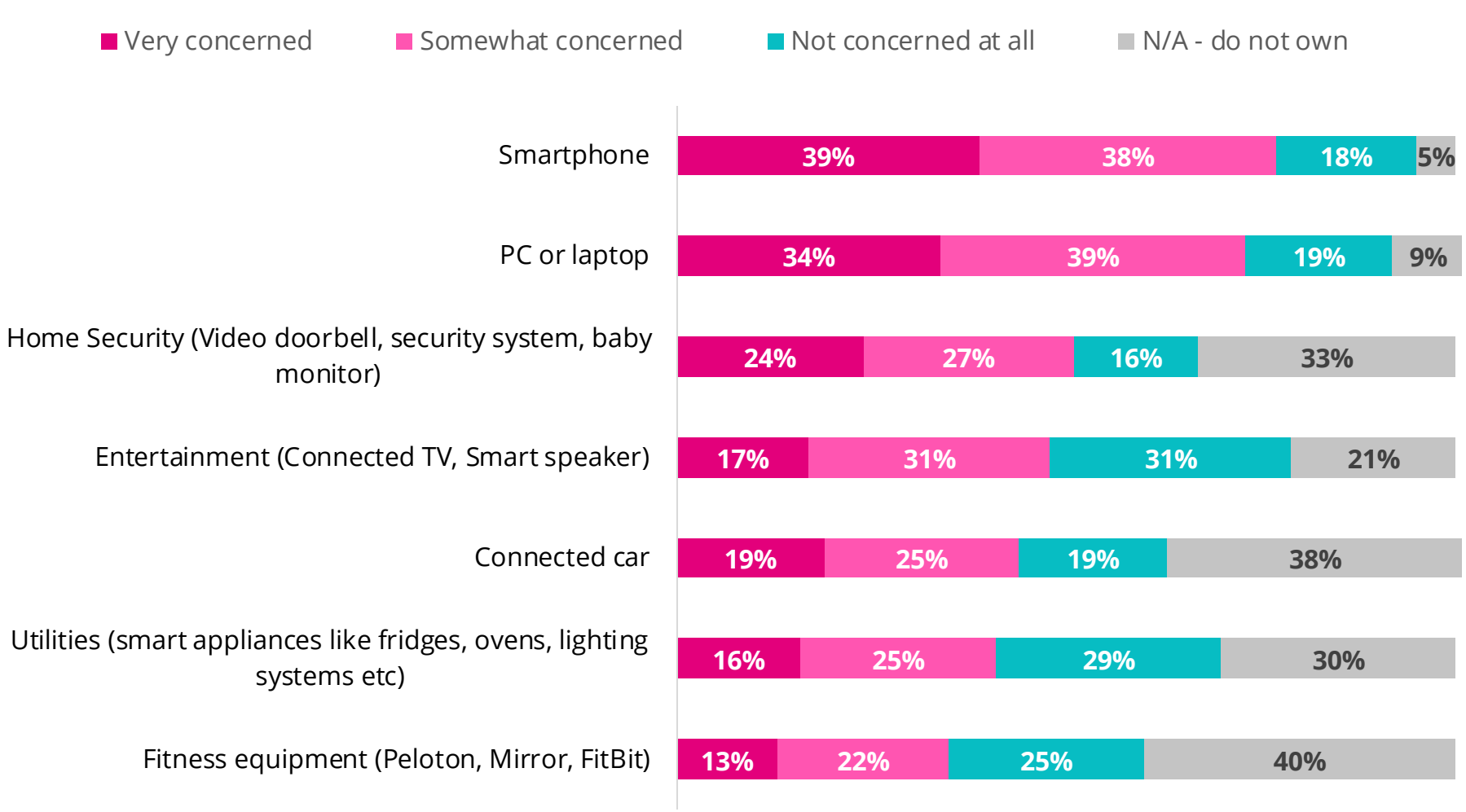




Q9. Have you taken any of the following steps over the past twelve months to protect some or all of your accounts from being hacked or compromised? Select all that apply

Base: 10,000

77% are very/somewhat concerned about the security of their Smartphone.

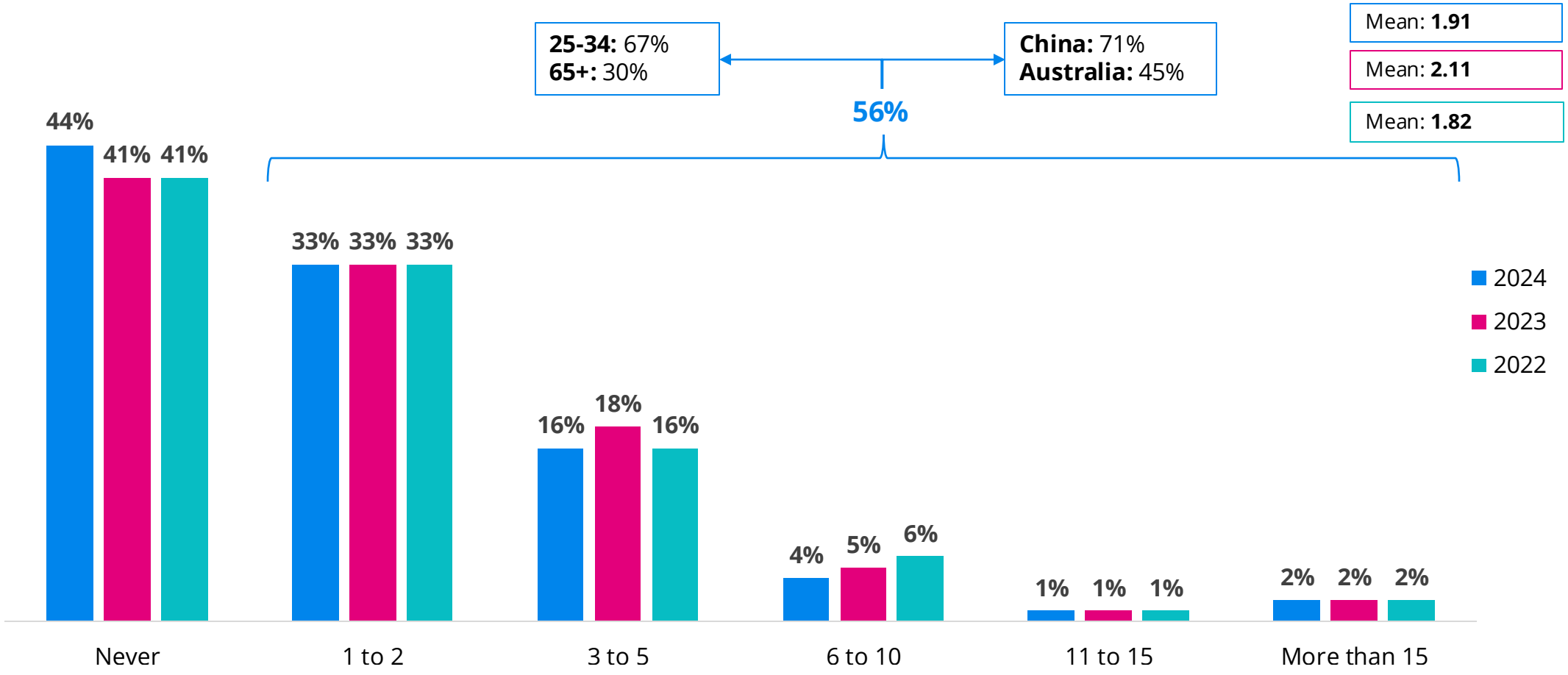


	% Very / somewhat concerned (2024)	% Very / somewhat concerned (2023)
Smartphone	77%	78%
PC or laptop	72%	73%
Home Security (Video doorbell, security system, baby monitor)	51%	52%
Entertainment (Connected TV, Smart speaker)	48%	49%
Connected car	44%	45%
Utilities (smart appliances like fridges, ovens, lighting systems etc)	41%	40%
Fitness equipment (Peloton, Mirror, FitBit)	35%	35%

Q10. Please express how concerned you are about the security of each smart device you may own?

Base: 10,000 (2024), 10,010 (2023)

56% of people have given up on accessing an online service at least once in the past month because they couldn't remember the password. On average respondents have given up twice in the past month, falling slightly from last year.

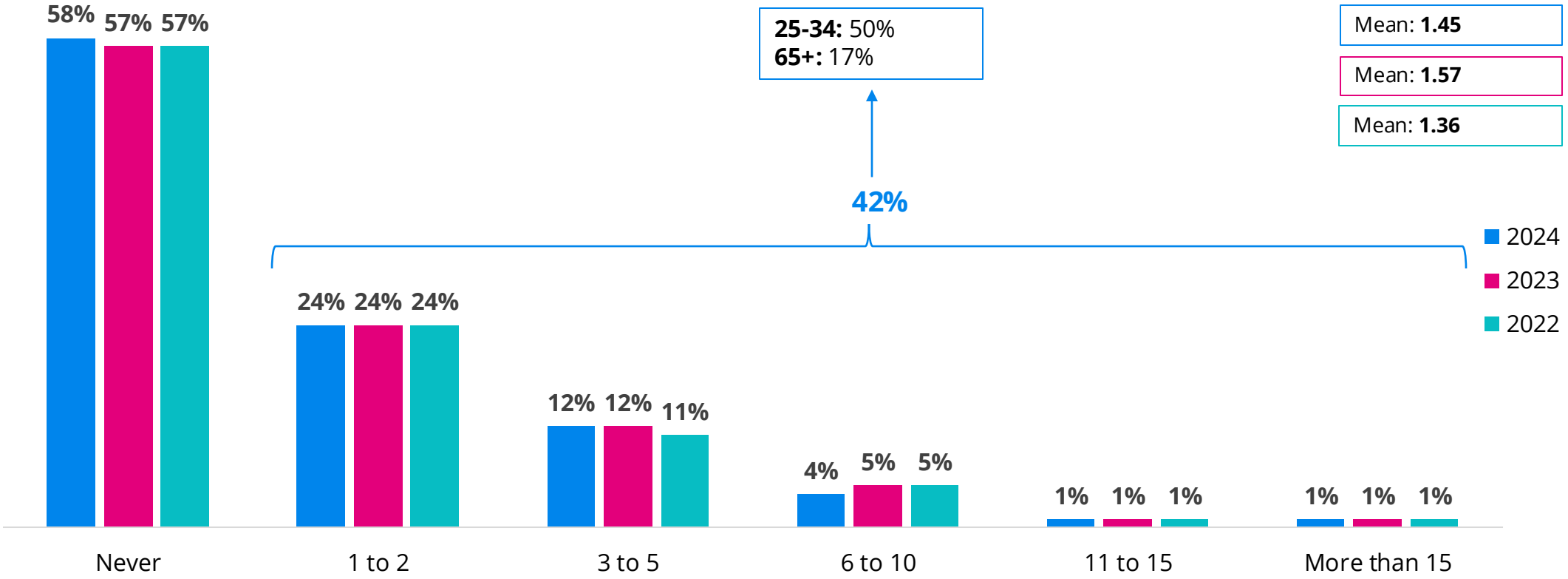


Q11. In the past month, roughly how many times have you given up on accessing an online service because you couldn't remember the password? Select one

Base: 10,000 (2024), 10,010 (2023), 10,044 (2022)

Abandoning purchases

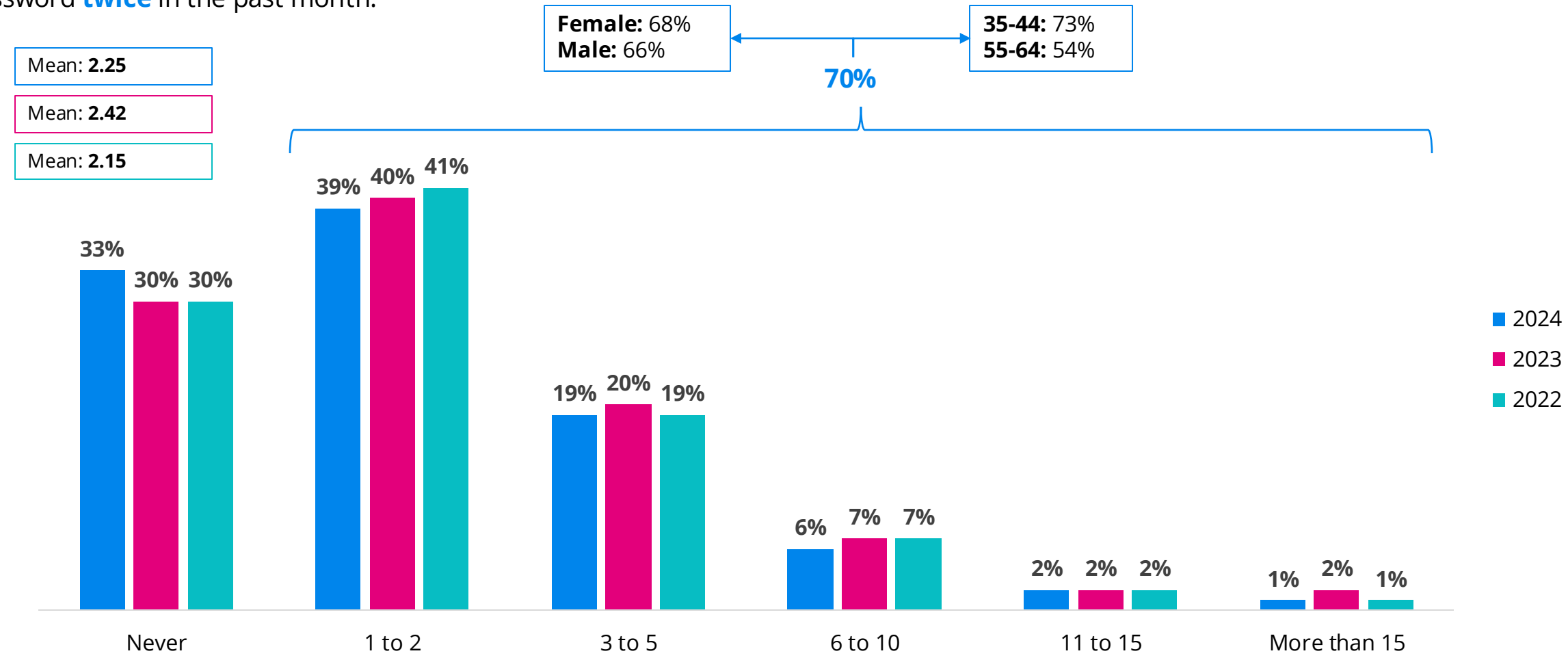
42% of people have abandoned a purchase at least once because they couldn't remember their password in the past month. This increases to **50%** for those aged 25-34



Q12. In the past month, roughly how many times have you abandoned a purchase because you couldn't remember your password? Select one

Base: 10,000 (2024), 10,010 (2023), 10,044 (2022)

Over 2 in 3 people (70%) had to reset / recover their password at least once this month. On average, respondents have reset their password **twice** in the past month.

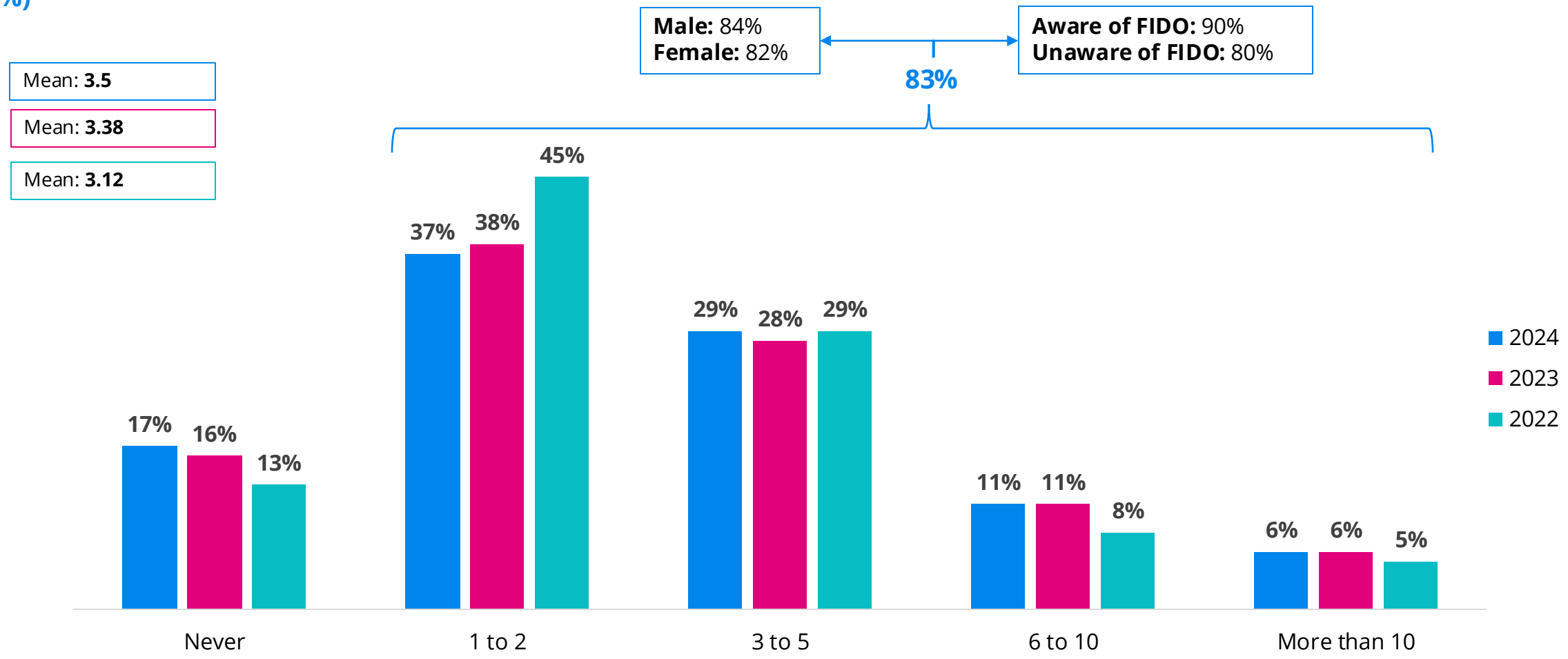


Q13. In the past month roughly how many times have you had to reset or recover your password? Select one

Base: 10,000 (2024), 10,010 (2023), 10,044 (2022)

Frequency of entering a password to sign into apps and websites

On average, people enter a password **4** times a day to sign into apps and websites. Females are likely to enter a password more times **(84%)**



Q14. On average, roughly how many times a day do you enter a password to sign into apps and websites? Select one

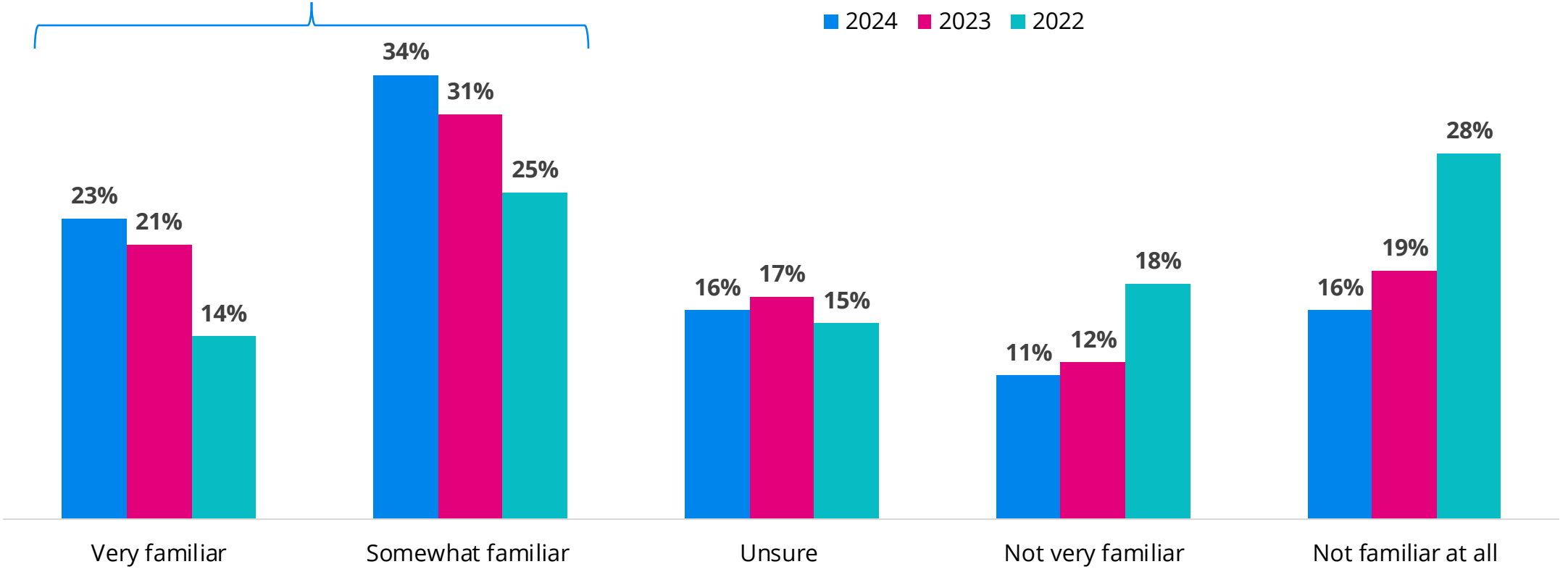
Base: 10,000 (2024), 10,010 (2023), 10,044 (2022)

Familiarity with passkeys

Familiarity with the concept of "passkeys" to access apps and online accounts continues to increase year on year

57% 2024 vs. **52%** 2023 vs. **39%** 2022

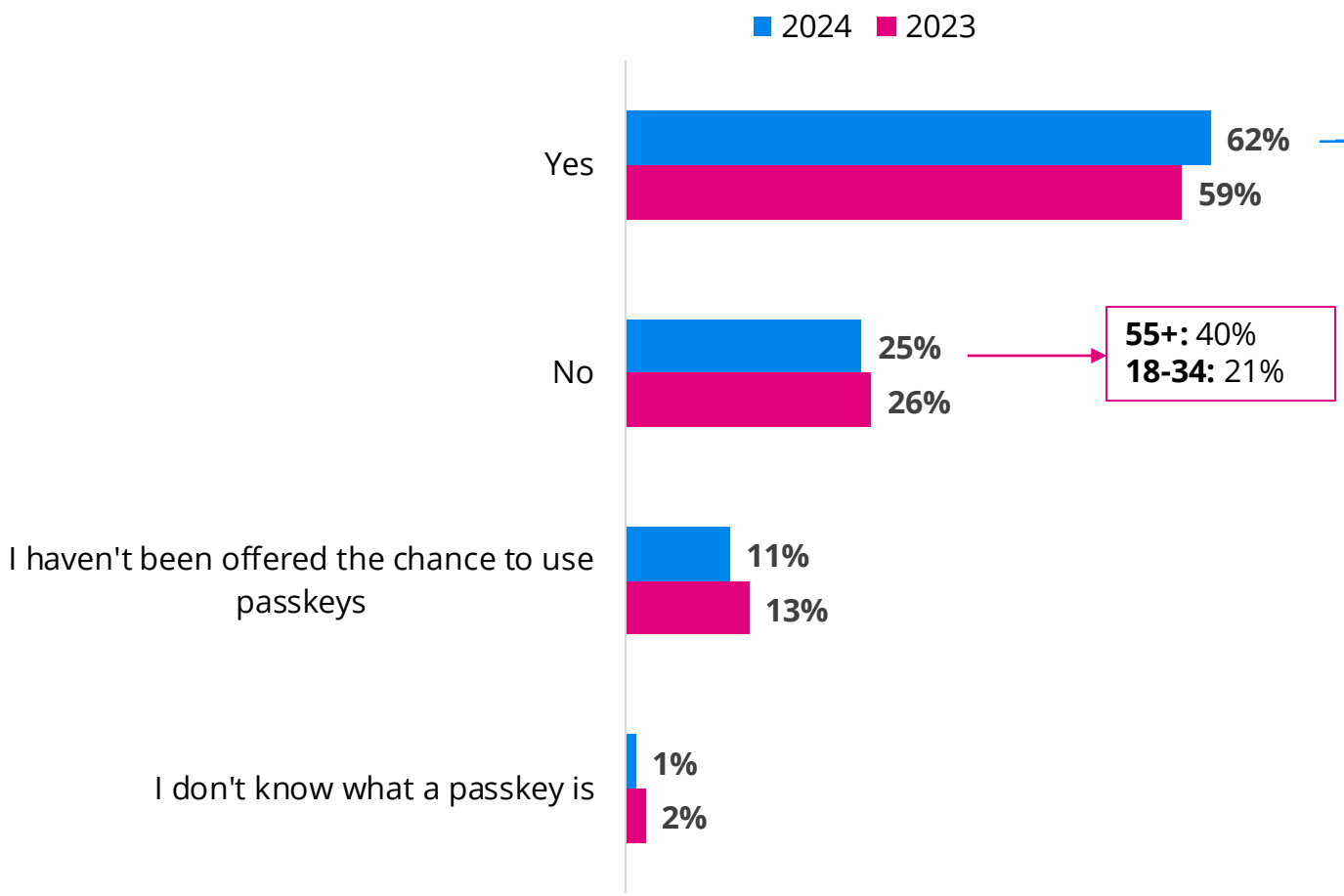
Aware of FIDO: 84%
Unaware of FIDO: 45%



Q15. Are you familiar with the concept of "passkeys" to access your apps and online accounts? Select one

Base: 10,000 (2024), 10,010 (2023), 10,044 (2022)

Of those familiar with the concept of 'passkeys', **62%** have enabled passkeys on their apps or websites. This is more common amongst males than females



Country	%
China	80%
India	73%
UK	66%
Japan	62%
Singapore	58%
US	58%
Germany	56%
Australia	52%
France	46%
South Korea	44%

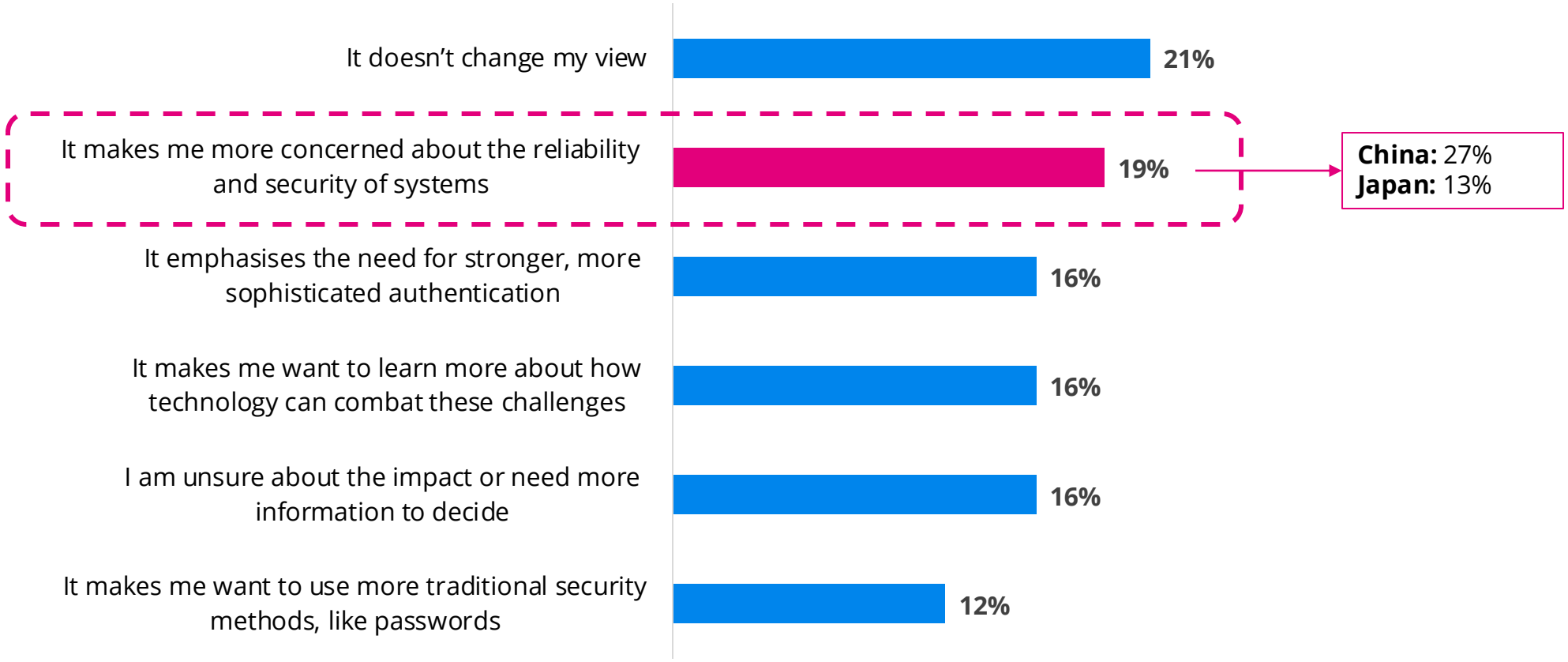
**Asked to those familiar with the concept of passkeys*

Q16. Have you enabled passkeys on any of your apps or websites? Select one

Base: 5690* (2024), 5189* (2023)

Impact of AI on attitude towards authentication

1 in 5 (21%) report that AI has not changed their view towards authenticating themselves online, however, a significant **19%** say that they feel **more concerned** about the reliability and security of systems

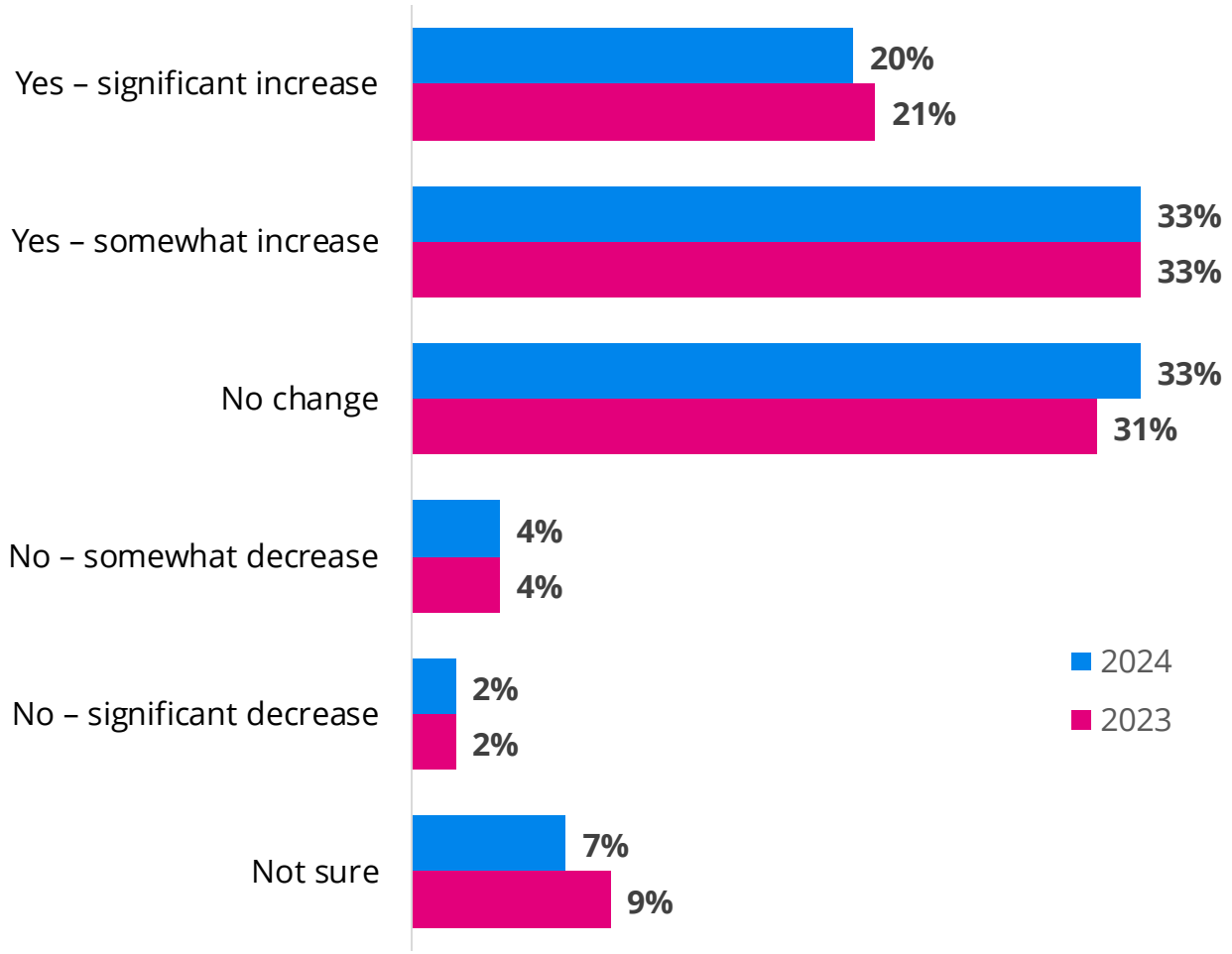


Q17. In the last twelve months, has AI changed how you feel when authenticating yourself online? Select one

Base: 10,000

Number of suspicious messages / online scams, and where this is most common

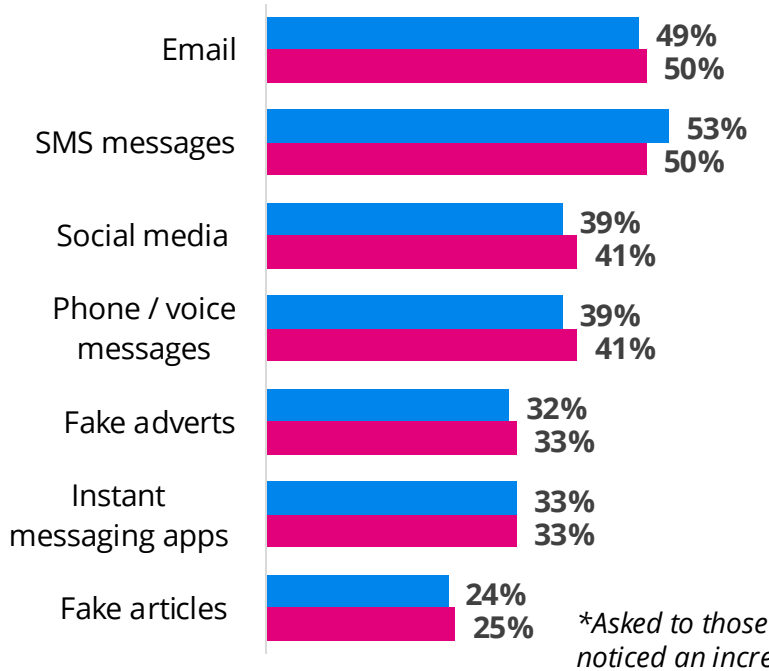
Of the **53%** of people that have noticed an increase of suspicious messages or scams online, half have noticed this increase in SMS messages and emails



53%

25-34: 63%
55-64: 35%

Where?



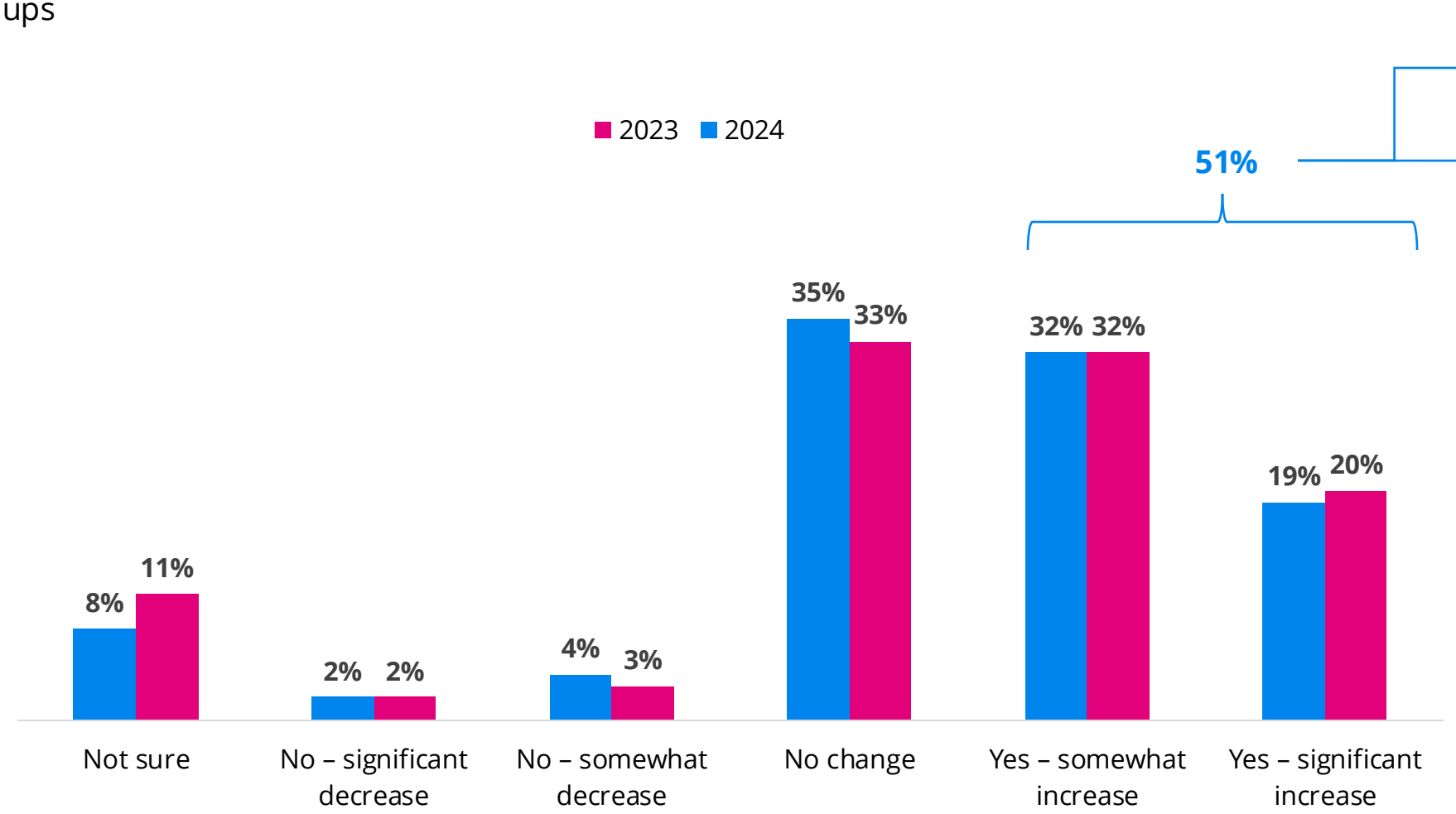
**Asked to those that have noticed an increase at Q18*

Q18. In the last few months have you detected a change in the number of suspicious messages or scams online? Select one
Q18. Where have you noticed this increase? Select all that apply

Base: 10,000 (2024), 10,010 (2023)
5278* (2024), 5426* (2023)

Sophistication of suspicious messages / scams

Half (51%) of people have noticed an increase in the sophistication of suspicious messages or scams online, particularly amongst younger age groups



Country	%
India	75%
China	64%
Singapore	63%
South Korea	55%
France	49%
US	47%
UK	46%
Australia	45%
Germany	37%
Japan	29%

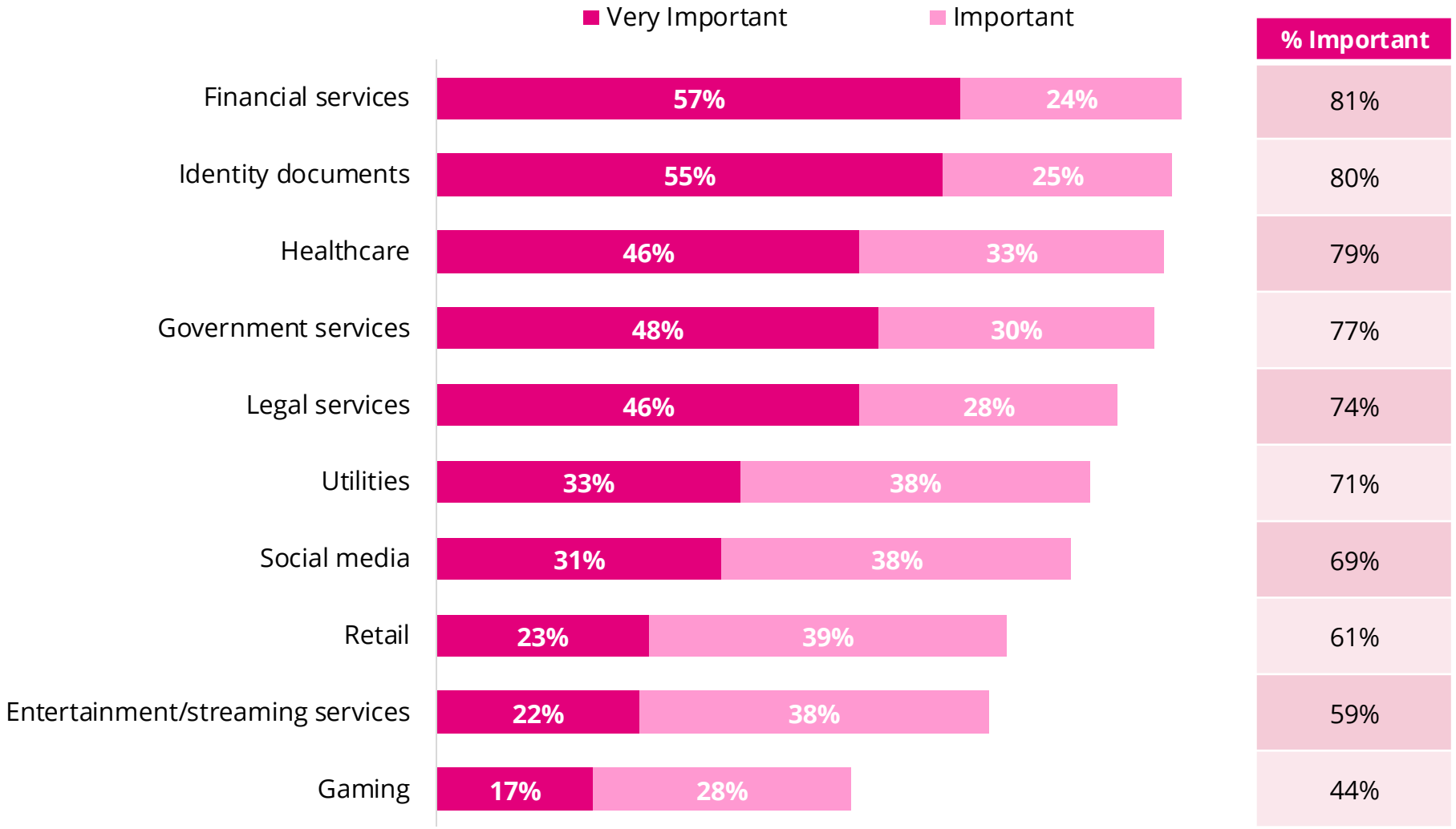
Q18. In the last few months have you noticed a change in the sophistication of suspicious messages or scams online? Select one

Base: 10,000 (2024), 10,010 (2023)

Opinions towards online verification

Importance of remote verification across services

People feel that it is most important that they can remotely verify their identity when it comes to **financial services (81%)** and **identity documents (80%)**

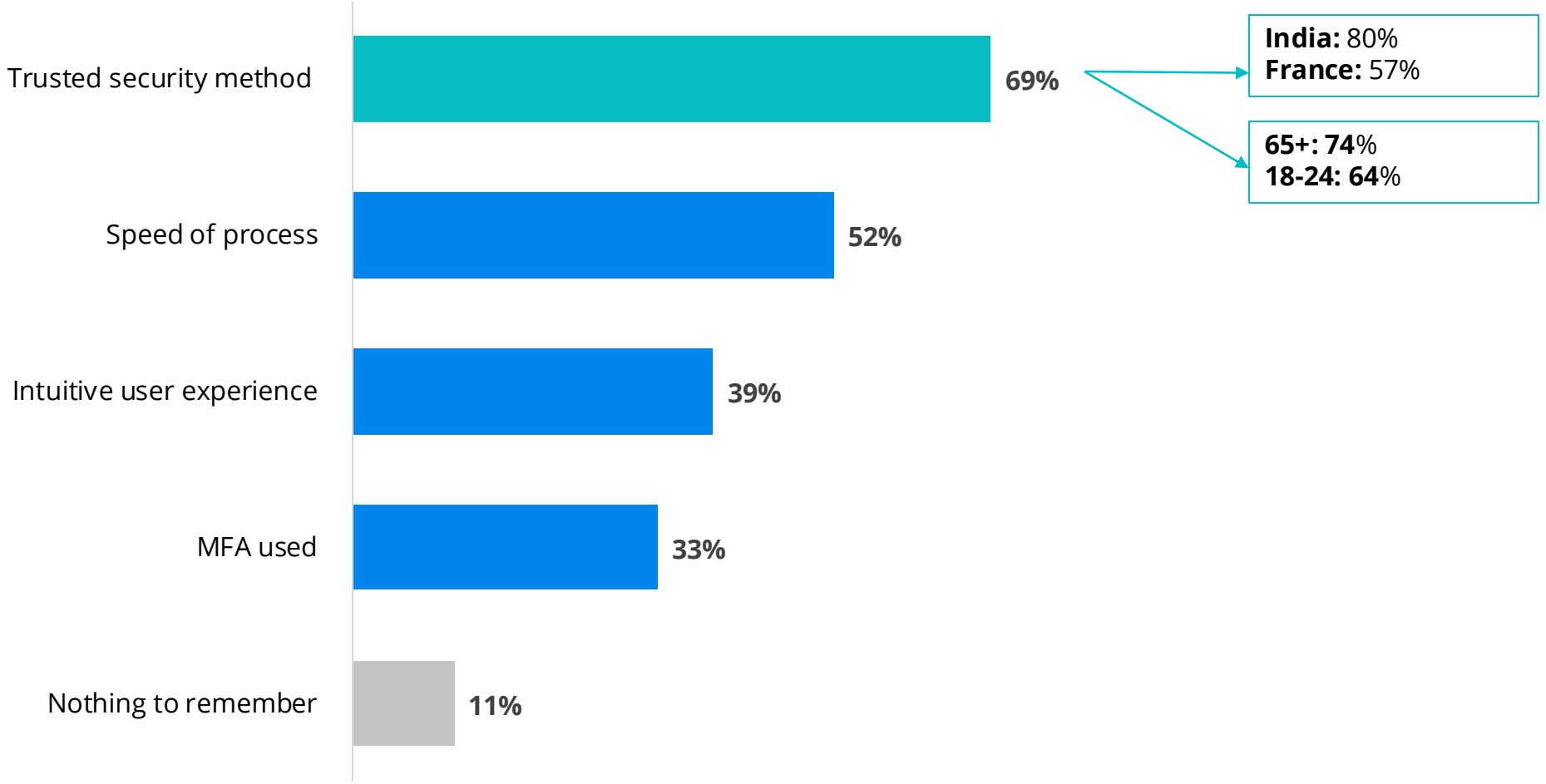


Q19. How important is it to have the option to verify your identity remotely for the following services?

Base: 10,000

Most valued attributes when verifying identity online

The most valued attribute when enrolling in a new service or verifying identity online is a **trusted security method (69%),** with around half **(52%)** valuing a **fast service**

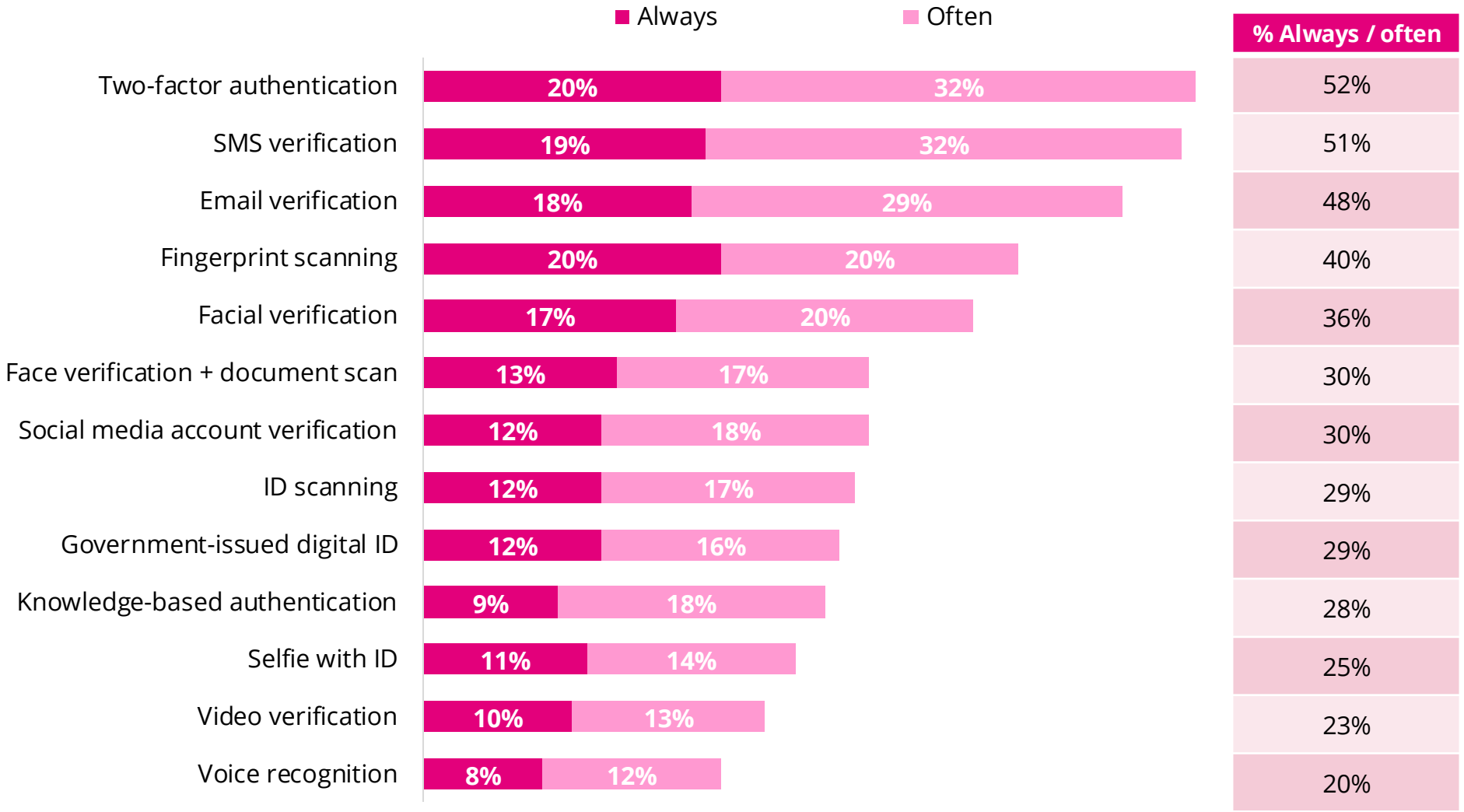


Q20. When enrolling to a new service or verifying your identity online, what are the top three things you value? Select top three

Base: 10,000

Frequency of verification by different methods

Respondents are most frequently asked to verify their identity through **two-factor authentication (52%)** and **SMS verification (51%)**

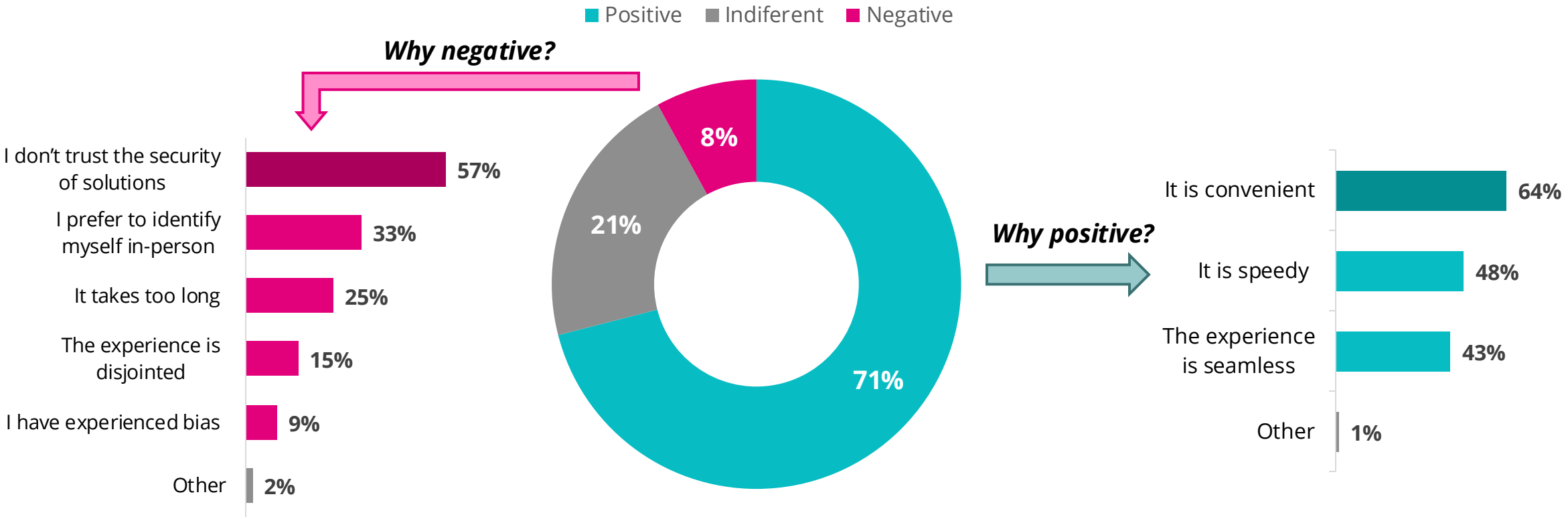


Q21. When enrolling online, how often are you asked to verify your identity using the following methods?

Base: 10,000

Frequency of verification by different methods

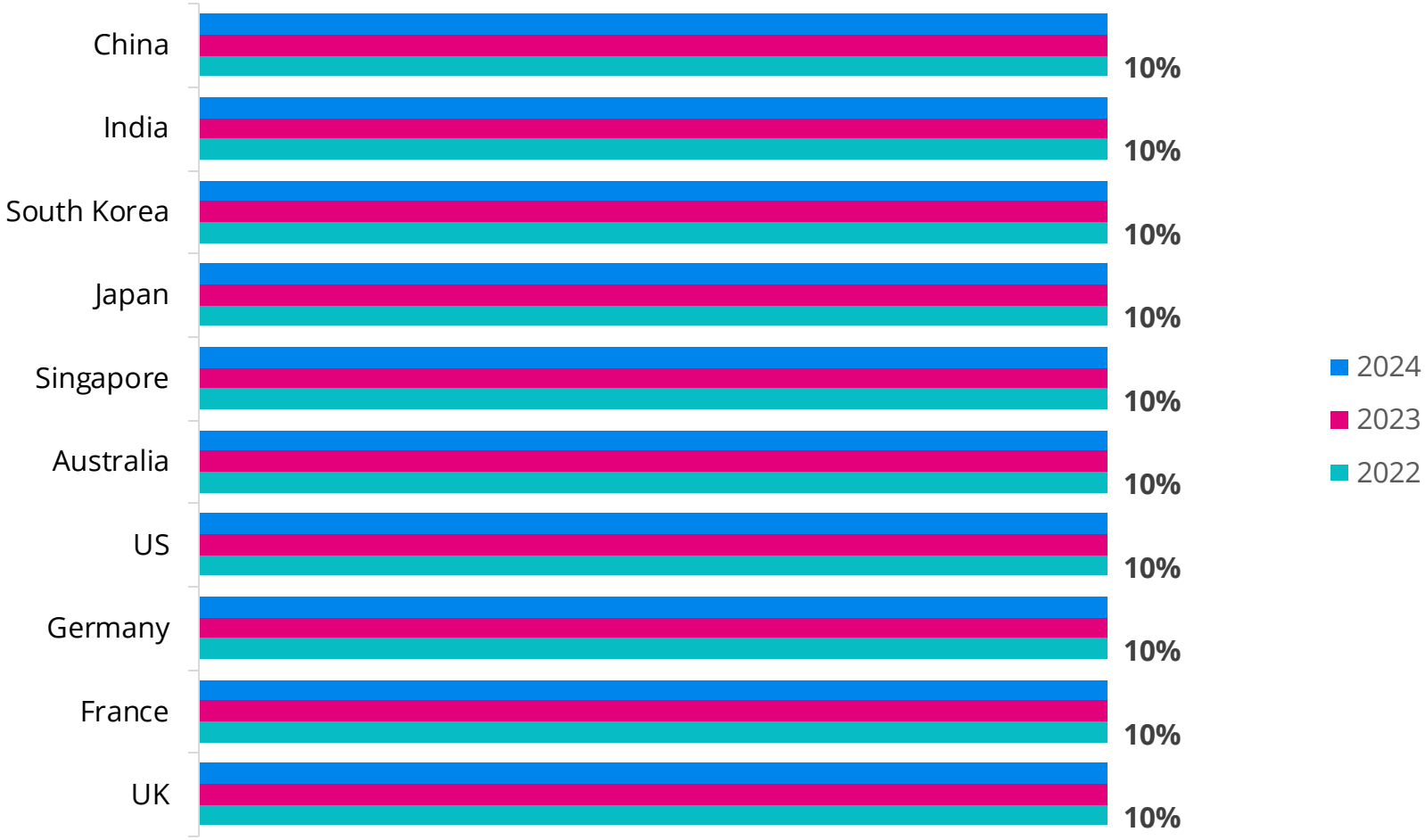
Almost three quarters (71%) feel positively about verifying their identity online. Amongst those who feel negatively, this is predominantly due to a **lack of trust in security of solutions (57%).**



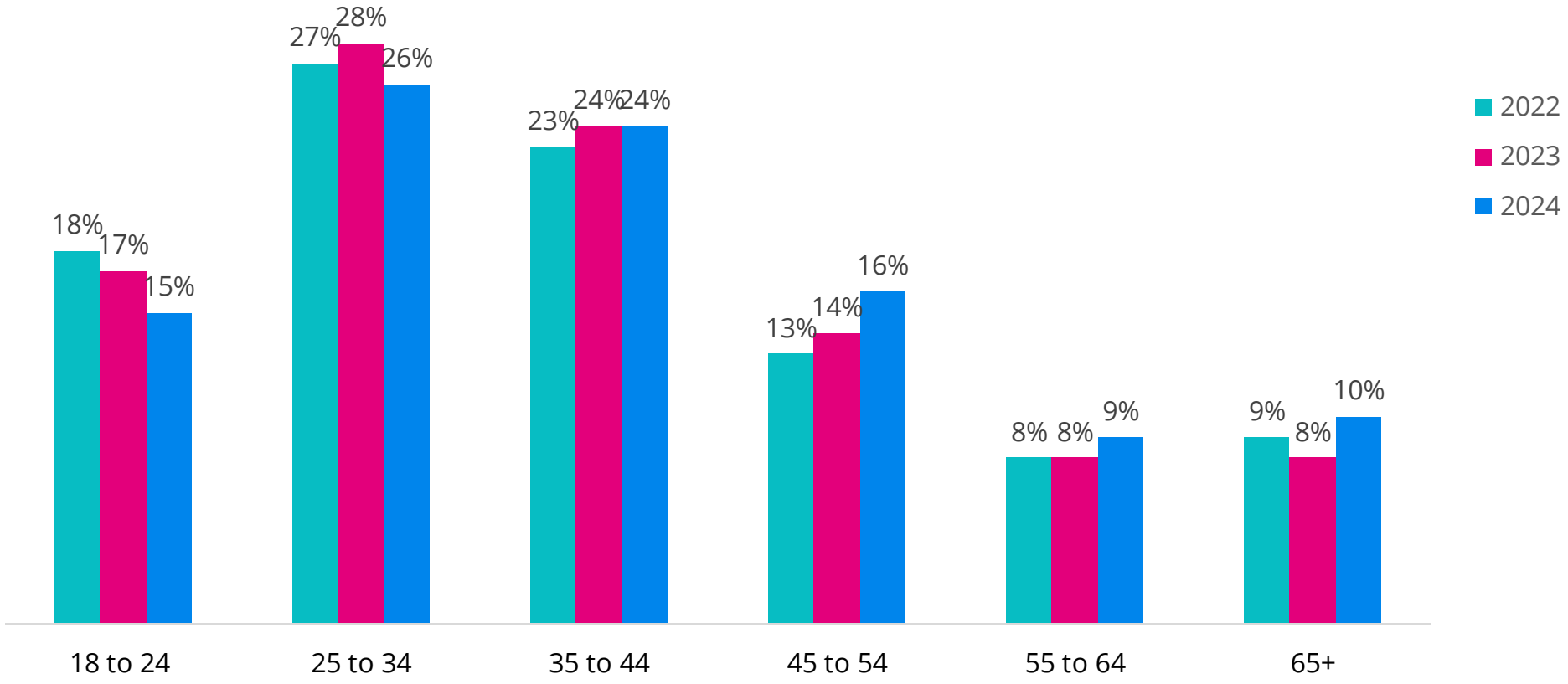
*Asked to those that feel positive at Q22
**Asked to those that feel negative at Q22

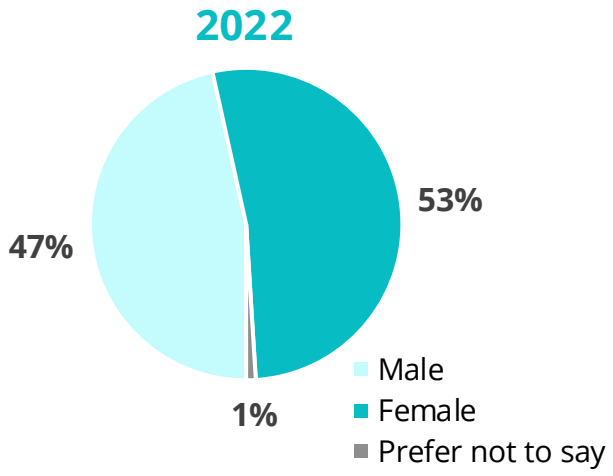
Q22. How do you feel about verifying your identity online? Select one — Base: 10,000
Q22. Why do you say you feel positive? Select all that apply — 7059*
Q22. Why do you say you feel negative? Select all that apply — 817**

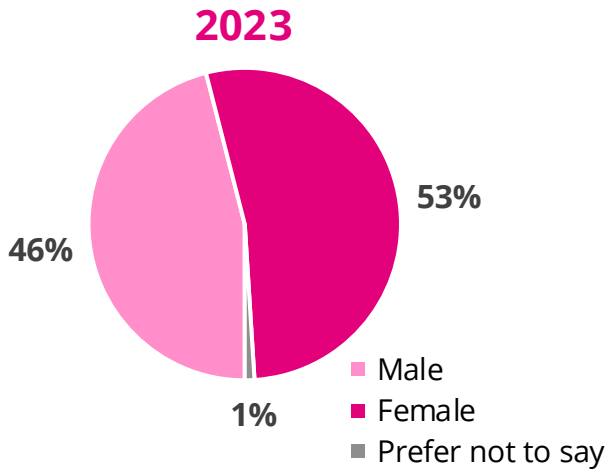
Detailed demographics

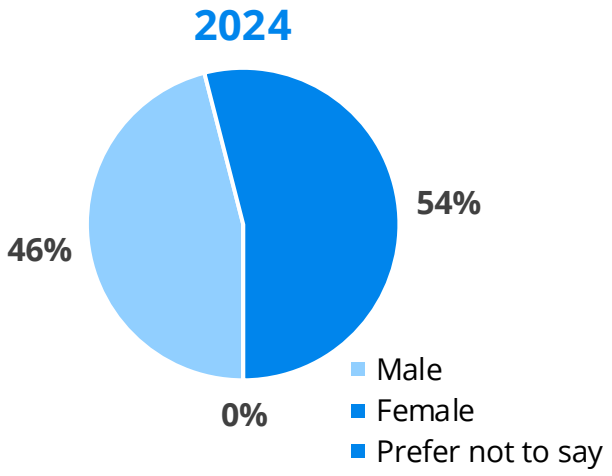

China
India
South Korea
Japan
Singapore
Australia
US
Germany
France
UK
10%
10%
10%
10%
10%
10%
10%
10%
10%
10%
2024
2023
2022

Age

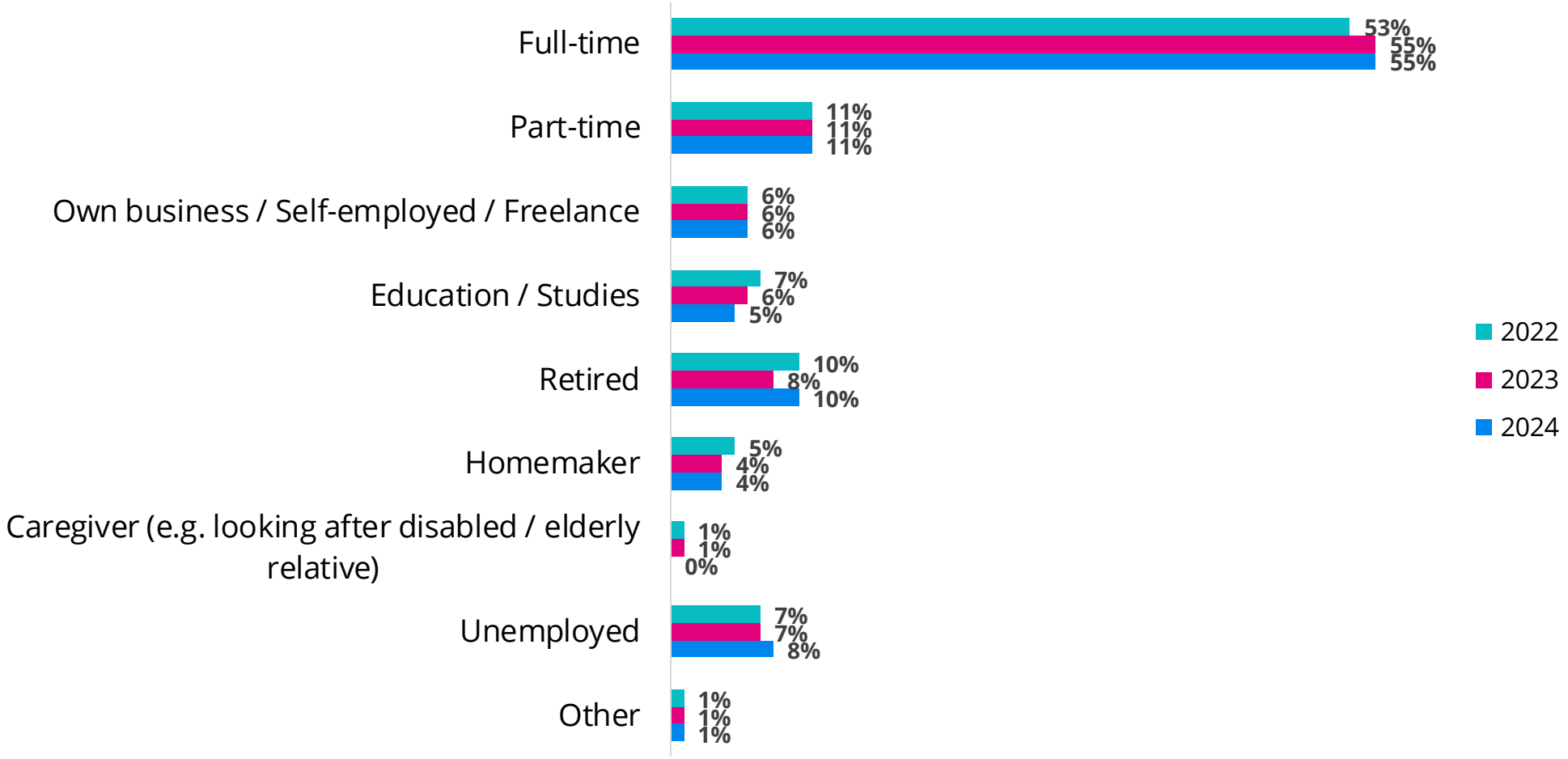

18%
17%
15%
27%
28%
26%
23%
24%
24%
13%
14%
16%
8%
8%
9%
9%
8%
10%
18 to 24
25 to 34
35 to 44
45 to 54
55 to 64
65+
2022
2023
2024


2022
53%
47%
1%
Male
Female
Prefer not to say


2023
53%
46%
1%
Male
Female
Prefer not to say


2024
54%
46%
0%
Male
Female
Prefer not to say

Employment status



Any questions?

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Thank you

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