



Department for
Science, Innovation
& Technology

Cyber Security of Consumer IoT: manufacturer survey

In the context of a growing market for consumer Internet of Things (IoT) products and an increasing risk of cyber attacks, consumer IoT products can be exploited to cause harm to individuals, companies, government, and society at large. In response, the UK Government has introduced the world's first legislation on the cyber security of consumer connectable products: the Product Security and Telecommunications Infrastructure (PSTI) Act 2022 and the PSTI Regulations 2023.

Prior to the introduction of the PSTI Regulations on 29th April 2024, the UK Government's Department for Science, Innovation and Technology (DSIT) commissioned a research study which aimed to:

- Map and analyse the market for consumer connectable products; and
- Collect and analyse evidence on the compliance of manufacturers with the PSTI legal regime, as well as evidence on awareness and impacts of the legislation.

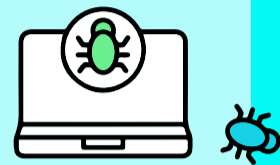
This infographic summary presents the key results from the research study, which was conducted by DJS Research and the Centre for Strategy & Evaluation Services (CSES) from November 2023 to April 2024.

The data in this infographic summary is based on a quantitative survey with 33 businesses (with the exception of the map below). It should be noted that despite best efforts to maximise responses, engagement of manufacturers was much lower than expected. This was due to a number of reasons including availability and accessibility of contacts.

Awareness (self reported)

Manufacturer concern about cyberattacks:

48% of manufacturers are 'very' (9%) or 'quite' (39%) concerned



91%



of manufacturers are aware of UK cyber security regulations related to consumer connectable products

76%

of manufacturers are fully aware of the PSTI Act & Regulations



Top three sources of information on the PSTI Act & Regulations (self reported):

48%

Industry or trade bodies



28%

UK Government public consultations



21%

Internal legal, compliance or product security teams

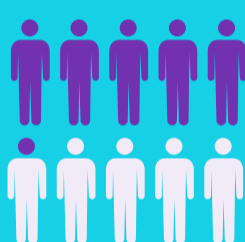


Benefits of compliance with the PSTI regime (self reported)

Top three anticipated benefits of compliance reported by manufacturers:

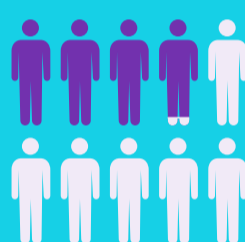
52%

Improved consumer confidence in products



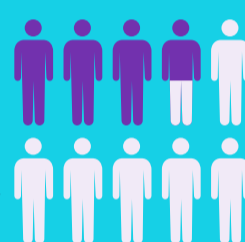
39%

Improved reputation



35%

Improved product security & reduced product cyber security vulnerabilities



Reported compliance levels with the PSTI regime pre-29 April 2024 (self reported)

Percentage of manufacturers that have reported introducing each requirement for all products (or where relevant)

52%

Passwords

58%

Provide public point of contact

27%

Provide information on minimum security update periods



Percentage of manufacturers expected to be compliant by 29th April 2024 (self reported):

Passwords

85%

of manufacturers selected 'very' or 'quite likely'



Point of contact

85%

of manufacturers selected 'very' or 'quite likely'



Minimum security update periods

88%

of manufacturers selected 'very' or 'quite likely'



Compliance activities in preparation for the PSTI regime (self reported)

Top five activities undertaken by manufacturers to ensure compliance:



Familiarisation with legislation
87%



Preparing a self-declaration/assessment of compliance
81%



Obtaining legal advice
68%



Conducting a third-party compliance assessment
52%



Amending compliance information at the point of sale
48%



Where are manufacturers of consumer connectable products based?

As part of our desk research, we collated information on 394 different companies. Analysis of these companies indicates that the main manufacturers of the consumer connectable products sold in the UK are based either in the US (n=134 manufacturers), China (83), and the UK (67).

Manufacturers of consumer connectable products by country of origin (n=394 manufacturers)

No. of manufacturers ● Not applicable ● 1-9 ● 10-49 ● 50-99 ● 100+



Centre for
Strategy & Evaluation
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Dataset compiled by CSES based on Copper Horse research and Beauhurst data, March 2024.