

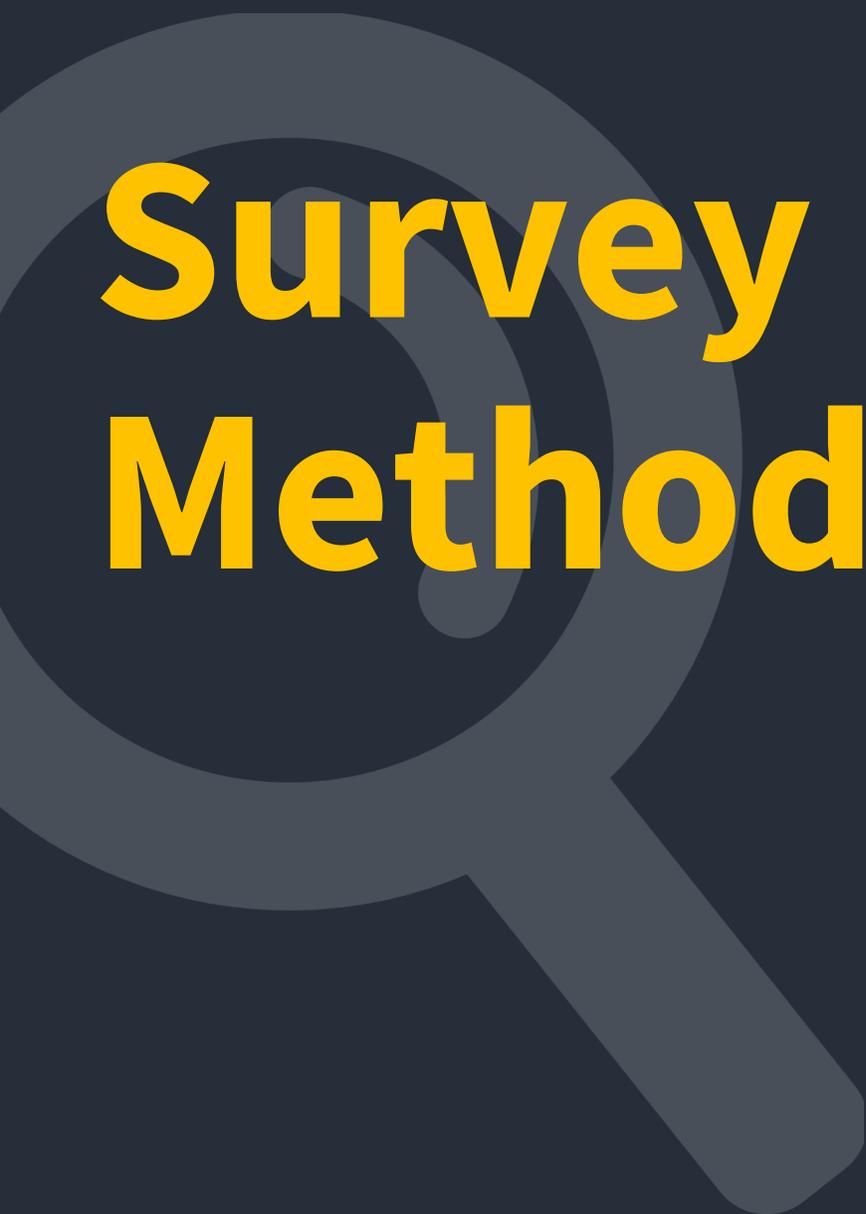


Cyber Safety Insights Report Global Results



Prepared by



A large, semi-transparent magnifying glass graphic is positioned on the left side of the slide, with its handle pointing towards the bottom right. The lens of the magnifying glass is centered over the text 'Survey Method'.

Survey Method

The research was conducted online by The Harris Poll on behalf of Norton™ LifeLock™ among more than 16,000 adults (aged 18+) in 16 countries. The survey was conducted October 9-30, 2018 in Australia (n=1,002), Brazil (n=1,051), Canada (n=1,026), China (n=1,051), France (n=1,065), Germany (n=1,001), Hong Kong (n=1,000), Italy (n=1,004), Japan (n=1,001), Mexico (n=1,050), Netherlands (n=1,003), New Zealand (n=1,002), Taiwan (n=1,000), UAE (n=1,001), UK (n=1,006), and US (n=1,004). Data are weighted where necessary to bring them in line with their actual proportions in the population. A global postweight was applied to ensure equal weight of each country in the global total. No estimates of theoretical sampling error can be calculated.

Figures on past year identity theft in the U.S. are from a separate online survey of 5,000 U.S. adults aged 18+ conducted by The Harris Poll on behalf of Norton™ LifeLock™ between January 2-18, 2019.

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Key Findings

Key Findings

Consumers around the world want it all when it comes to protecting their personal information. They are concerned about their privacy (83%), but most say they accept certain risks to make life more convenient (61%); they want companies to give them control of their personal data¹, but also say they are willing to sell their information for the right price²; they are in agreement that they want companies to be held accountable³, but are not willing to pay the companies/organizations that hold their most important personal information to secure it⁴.

Competing priorities aside, 3 in 4 consumers (76%) are more alarmed than ever about their privacy and a third or less trust healthcare providers (33%), financial institutions (25%), government (24%), retailers (14%), and social media providers (6%) a lot to protect their personal information. In fact, one in five (22%) have gone as far as deleting a social media account in the past 12 months due to privacy concerns.

¹ Nearly all consumers say that it's important for companies to give them the ability to control (95%) and find out (95%) how their personal data is being used (or be fined).

² Over a third of consumers say they would accept money from companies in exchange for access to their Internet search history (38%) and location (37%).

³ 96% of consumers say that it's important for companies to give consumers a way to report misuse of personal data (or be fined).

⁴ The majority of consumers wouldn't pay social media providers (69%), retailers (62%), financial institutions (59%), or healthcare providers (57%) to protect their personal information.

Key Findings Continued

Consumer concern appears to be warranted. Across 16 countries, more than a billion adults have been the victims of **cyber crime**, 800 million in the last year alone, and nearly 2 in 3 (64%) believe they are likely to experience cyber crime in the next year. Of those who did experience cyber crime in the past year, 38% had a financial loss and spent 6 hours on average resolving the crime.

Beyond cyber crime, 117 million adults, men and women, young and old, in 16 countries around the globe were impacted by **identity theft** in the past year. What's more, parents don't seem to know that it's not an adult-only problem—more than half (56%) are unaware that children can be victims of identity theft too.

So what do consumers do next? The majority (87%) say they want to do more to protect their privacy but many (55%) don't know how. While most (86%) say they have taken at least some steps to protect their online activities and personal information, they do not appear to be doing so with consistency or rigor⁵.

⁵ Less than half of consumers globally have taken any one measure to protect their online activities and personal information. The most common are limiting information shared on social media (49%) and clearing or disabling cookies (41%). Less than 1 in 5 are using anonymous payment methods (19%), using an encrypted email service (19%), deleting social media accounts (17%), or using VPNs (14%).

The title "Key Findings Continued" is displayed in a bold, yellow font. The word "Key" is significantly larger than "Findings", and "Continued" is in a smaller, lighter yellow font. The text is positioned in the upper left corner of the slide, partially overlapping a dark blue header bar. A decorative graphic of overlapping circles is visible behind the text.

Key Findings Continued

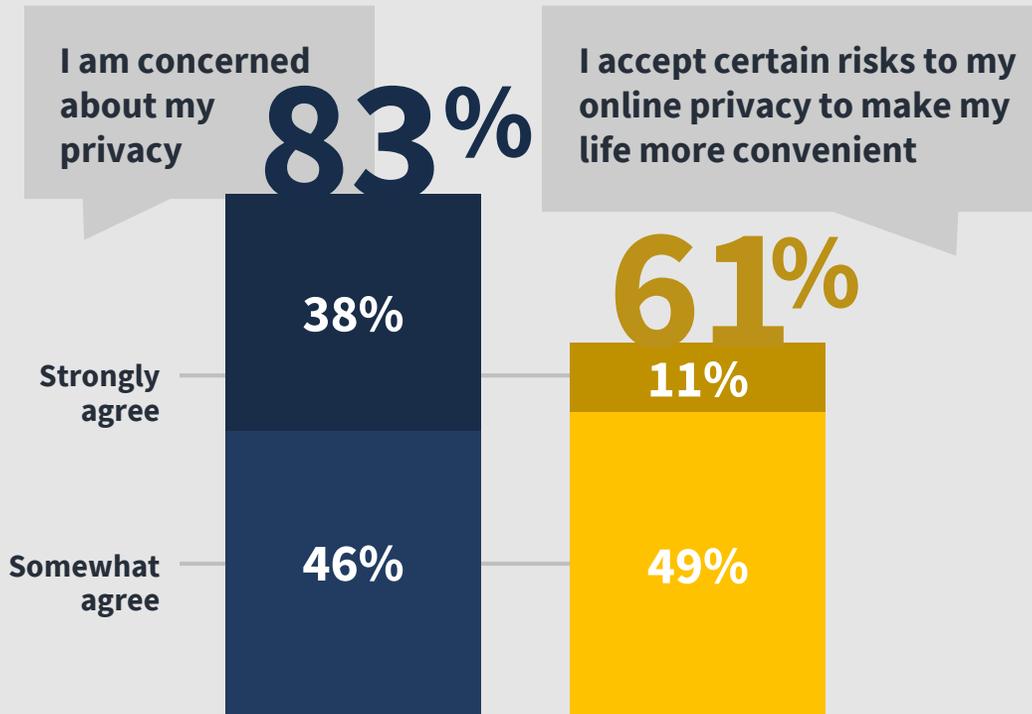
However, while consumers may not know how to protect their personal information, they do seem to be a bit more in the know when it comes to protecting against cyber crime (though they could be doing more!). Most are already taking the precautionary measures of not sharing passwords (80%), not opening suspicious files or links (79%), and limiting information shared on social media (77%) to protect themselves and their devices, but fewer are going as far as using paid anti-virus software (40%) or—in the US—an identity theft protection service (36%).



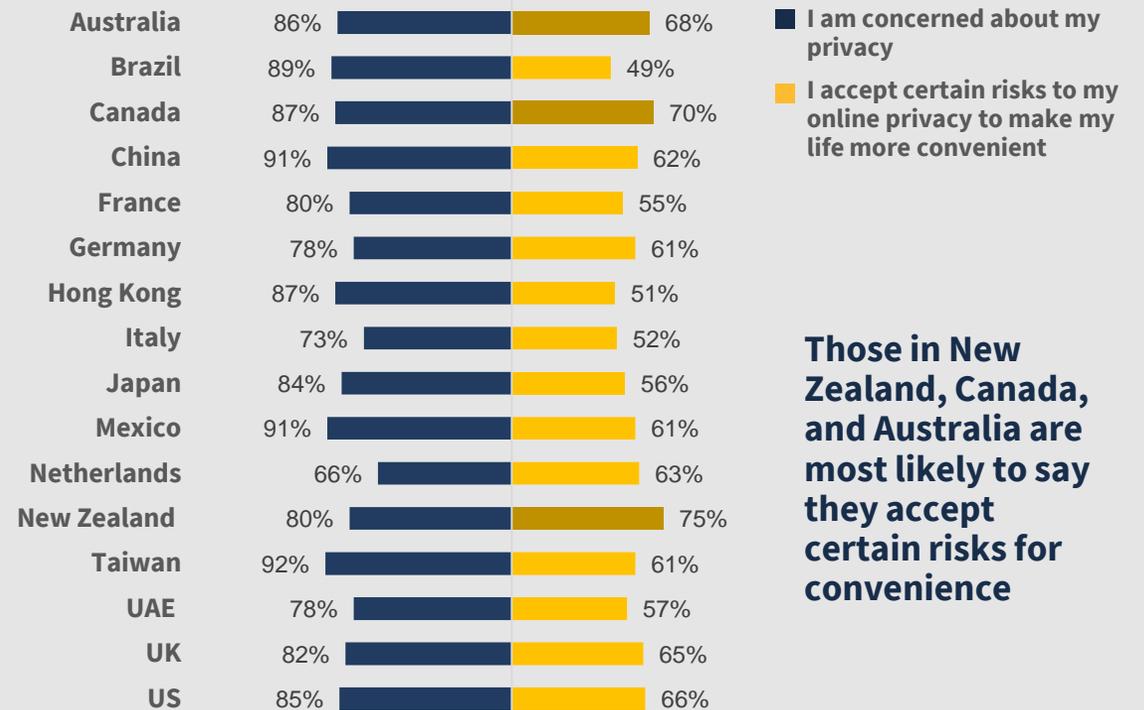
Protecting Personal Privacy

Consumers Are Concerned About Privacy, But Are Also Willing To Accept Certain Risks For Added Convenience

Global Total



% Agree by Country



Those in New Zealand, Canada, and Australia are most likely to say they accept certain risks for convenience

Most Consumers Would Not Give Access to Their ID Info, Even at a Price, But Would Offer Their Internet Search History and Location

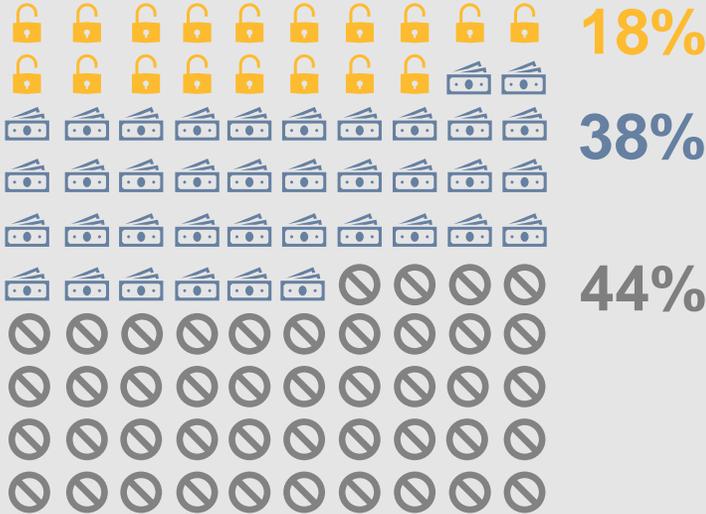
Price (per month) for Providing Access to Personal Information (Global Total)

 would give for free  need to be paid  would not sell

Internet Search History

Location

Identification Document Information *(such as passport or driver's license information)*



In General, Consumers in Italy, Mexico and the UAE are Most Inclined To Allow Access to Personal Information

Price (per month) for Providing Access to Personal Information by Country

Internet Search History

	Australia	Brazil	Canada	China	France	Germany	Hong Kong	Italy	Japan	Mexico	Netherlands	New Zealand	Taiwan	UAE	UK	US
\$0 (give away)	16%	12%	18%	16%	18%	14%	18%	19%	16%	26%	23%	12%	10%	26%	17%	20%
\$1+	30%	45%	35%	34%	42%	36%	34%	52%	28%	42%	33%	33%	42%	51%	36%	35%
Would not sell	54%	43%	47%	49%	40%	49%	48%	29%	56%	32%	44%	55%	48%	23%	47%	45%

Location

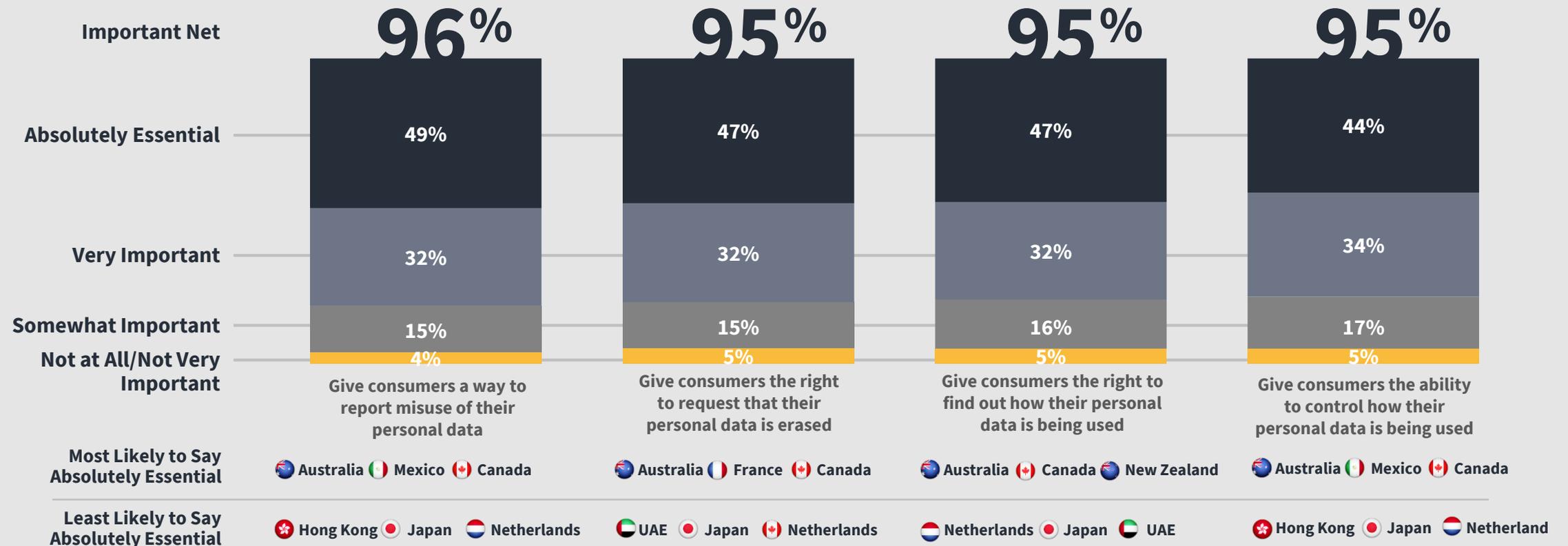
	Australia	Brazil	Canada	China	France	Germany	Hong Kong	Italy	Japan	Mexico	Netherlands	New Zealand	Taiwan	UAE	UK	US
\$0 (give away)	19%	15%	20%	18%	19%	17%	18%	20%	16%	23%	26%	14%	8%	27%	20%	19%
\$1+	32%	36%	37%	35%	40%	40%	29%	53%	25%	35%	34%	36%	39%	48%	37%	36%
Would not sell	48%	48%	43%	47%	41%	43%	52%	27%	59%	42%	40%	50%	53%	25%	43%	45%

Identification Document Information *(such as passport or driver's license information)*

	Australia	Brazil	Canada	China	France	Germany	Hong Kong	Italy	Japan	Mexico	Netherlands	New Zealand	Taiwan	UAE	UK	US
\$0 (give away)	15%	11%	15%	14%	15%	12%	14%	14%	13%	20%	22%	10%	4%	23%	16%	18%
\$1+	19%	28%	19%	27%	29%	26%	18%	37%	19%	37%	21%	19%	30%	48%	26%	25%
Would not sell	66%	61%	66%	60%	55%	63%	68%	49%	69%	43%	56%	71%	66%	29%	58%	57%

Consumers Emphasize The Importance of Accountability and Control Over Their Personal Information

Importance of Requiring Companies and Organizations to Do the Following or Impose Fines (Global Total)



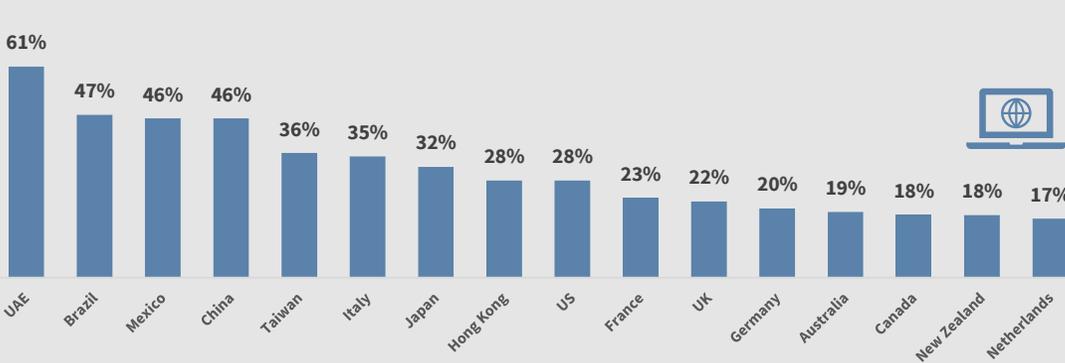
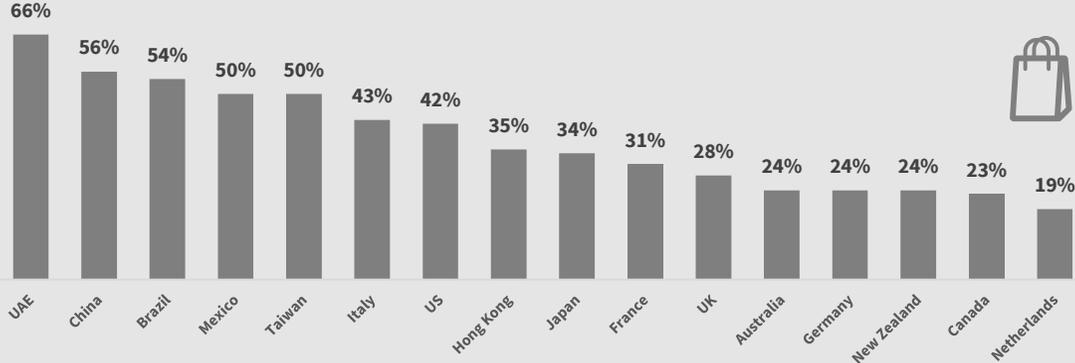
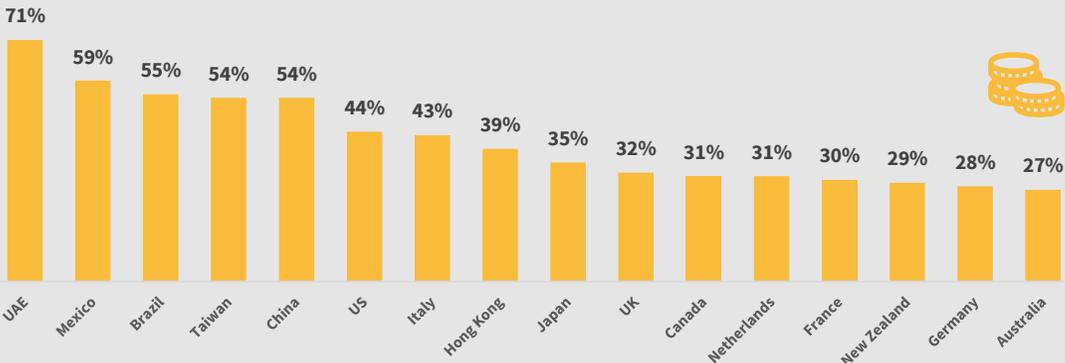
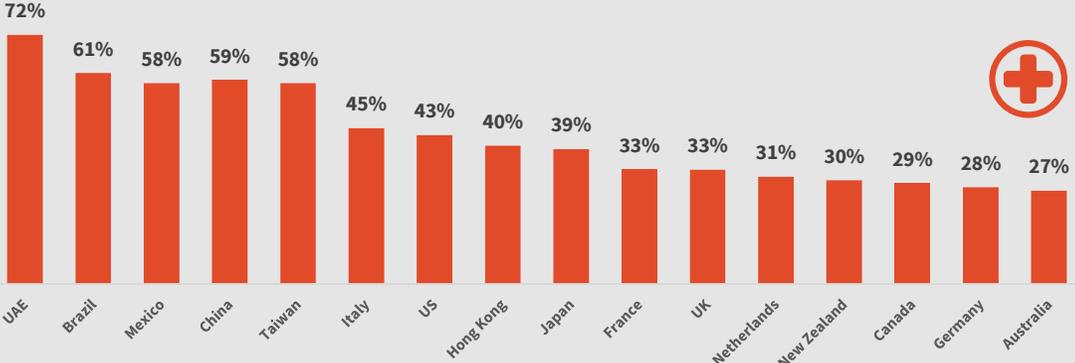
Most Consumers are Not Willing to Pay Companies a Monthly Fee to Ensure Their Personal Information is Protected

**Willingness to Pay \$1+
Per Month to Ensure
Protection of Personal
Information
(Global Total)**



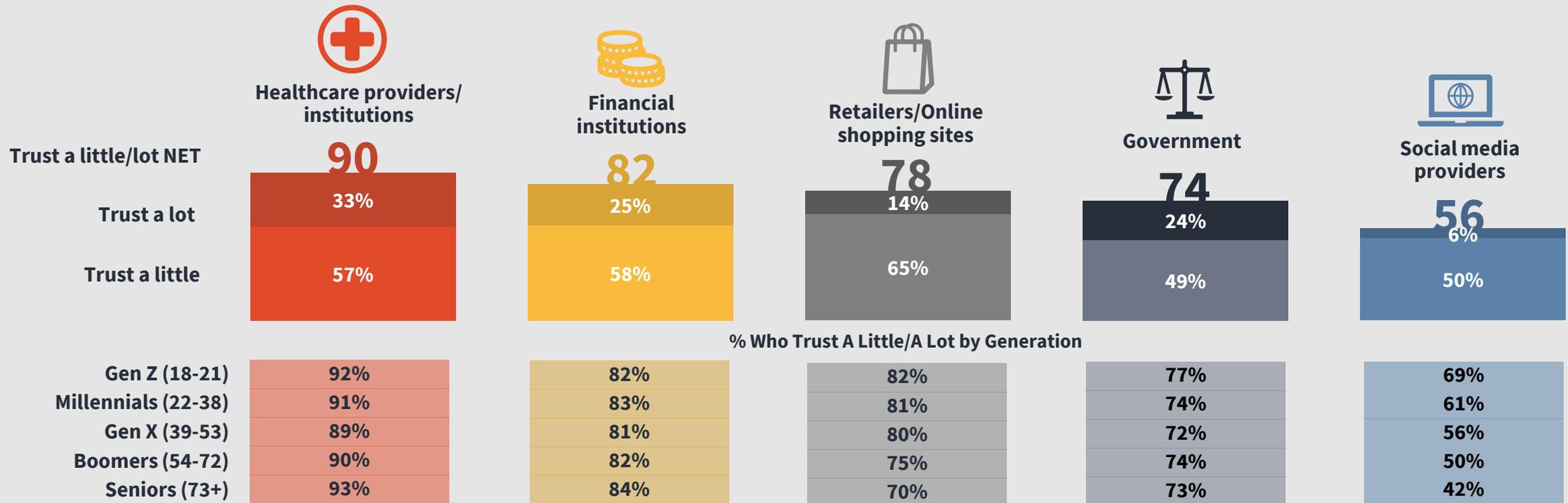
Consumers in the UAE are Most Inclined to Pay to Protect Their Personal Information

Willingness to Pay \$1+ Per Month to Ensure Protection of Personal Information by Country

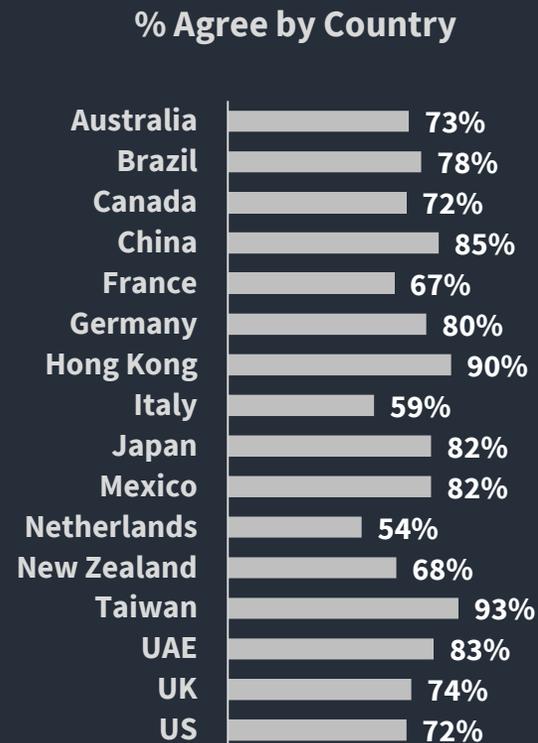
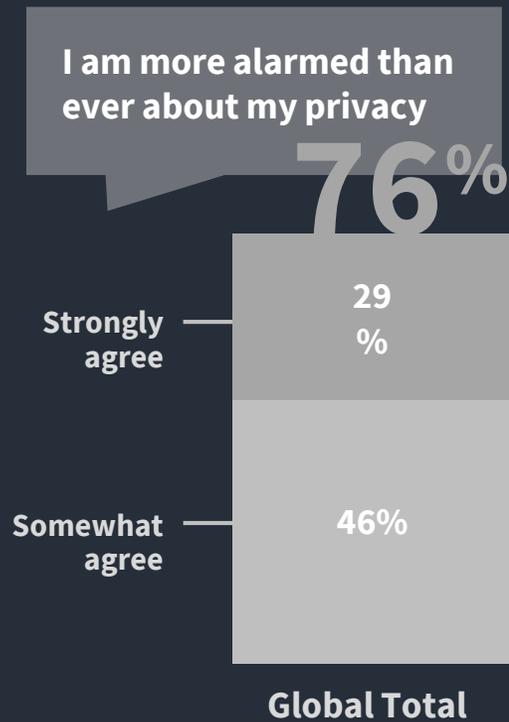


Trust in Social Media Providers to Protect Personal Information Trails Other Organizations Holding Sensitive Information

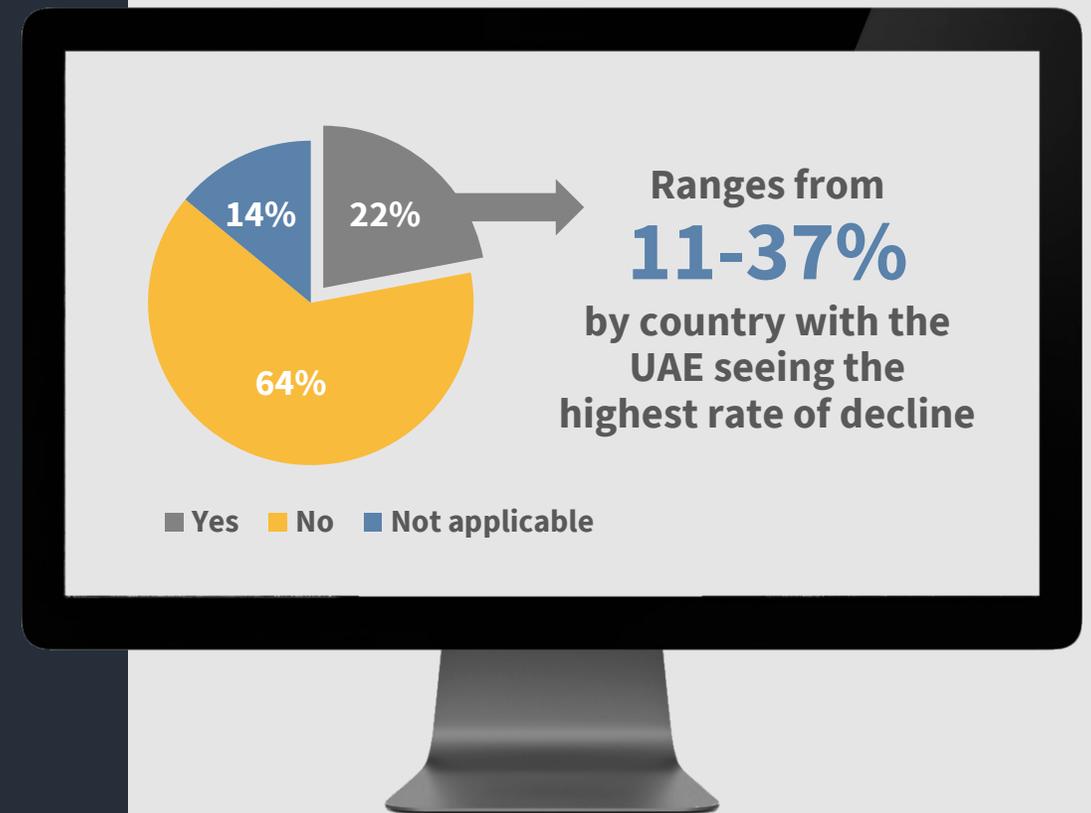
Trust in Managing and Protecting Personal Information (Global Total)



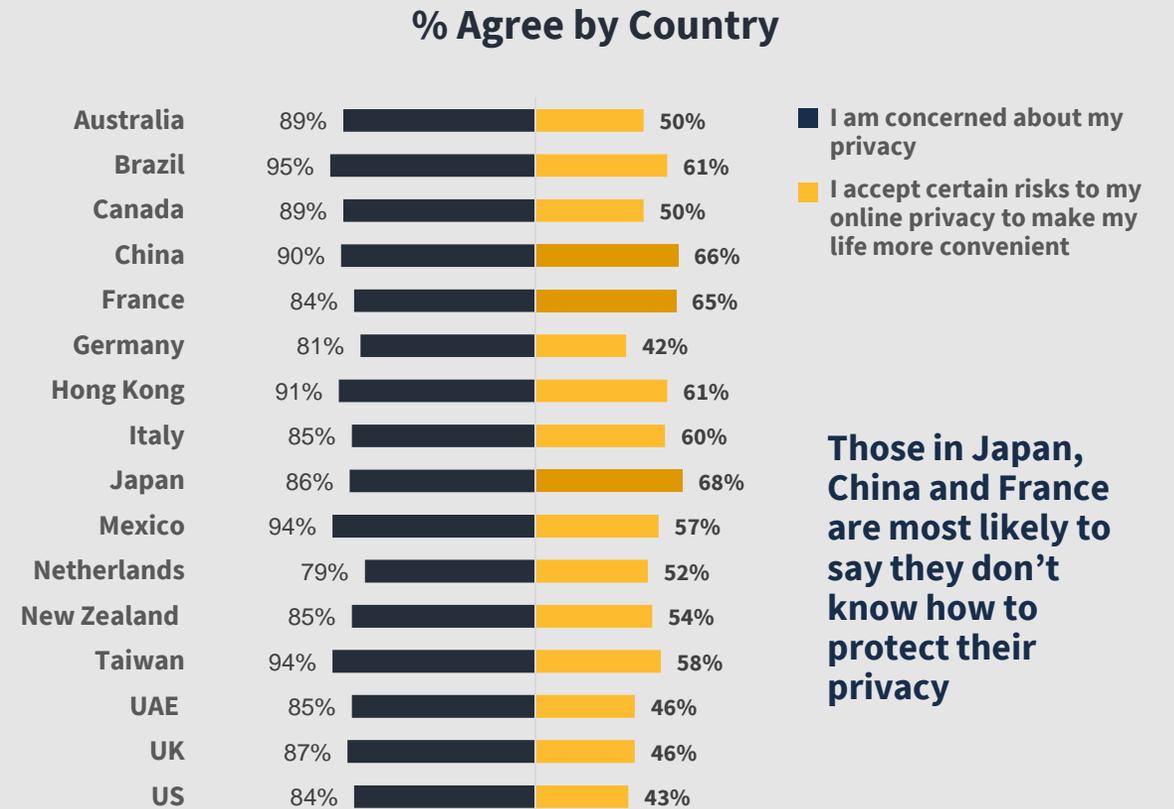
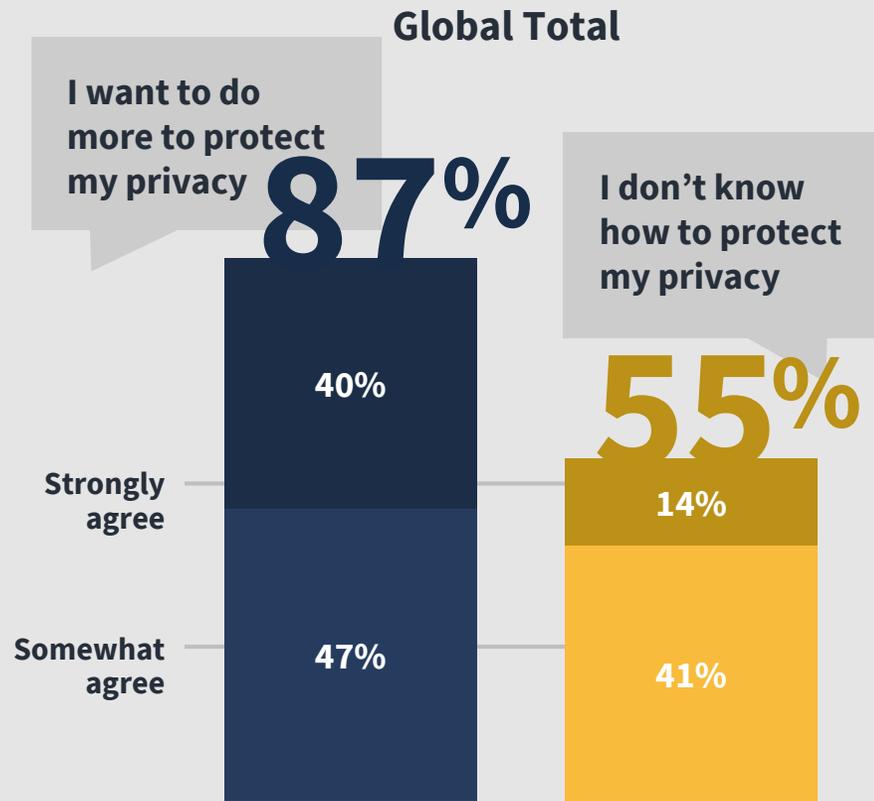
A Full 3 in 4 are More Alarmed Than Ever About Privacy and Over 1 in 5 Have Deleted a Social Media Account In Response



Deleted a social media account due to privacy concerns in past 12 months (Global Total)



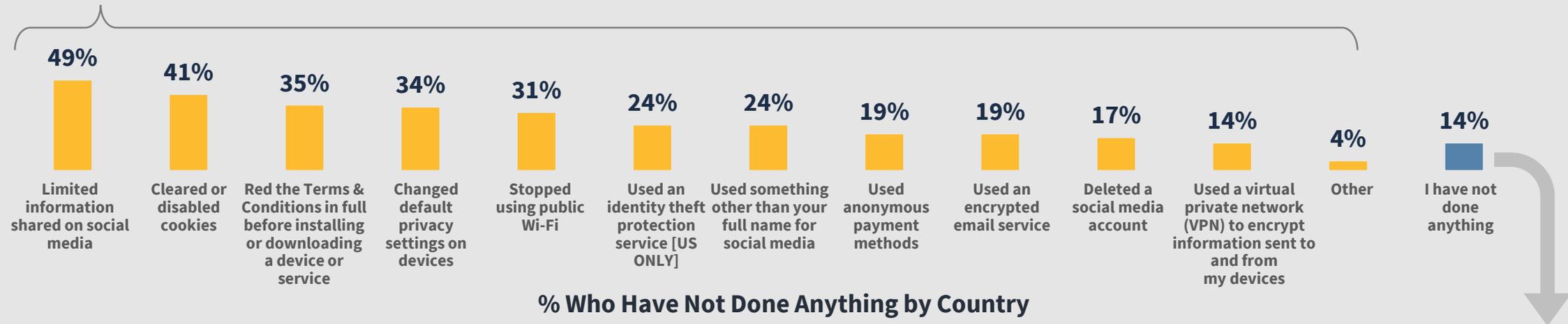
While 87% of Consumers Want to Do More to Protect Their Privacy, More Than Half Don't Know How



The Majority Have Taken Some Steps to Protect Their Online Privacy but No Single Activity is Performed Consistently by All

Steps Taken to Protect Online Activities and Personal Information (Global Total)

86% have taken at least some steps



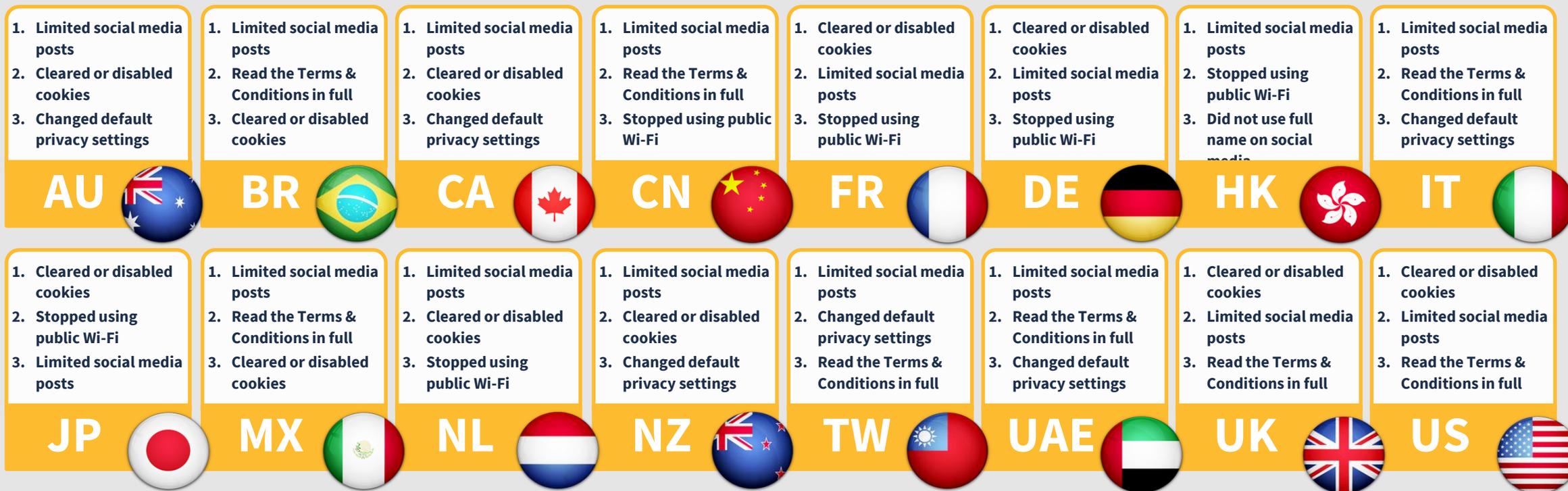
% Who Have Not Done Anything by Country

Australia	Brazil	Canada	China	France	Germany	Hong Kong	Italy	Japan	Mexico	Netherlands	New Zealand	Taiwan	UAE	UK	US
14%	9%	10%	14%	15%	11%	13%	16%	34%	6%	17%	11%	18%	7%	12%	14%

With some of the lowest rates of cyber crime and identity theft identified in this study, it's not surprising that Japanese consumers are the least likely to have taken steps to protect their online activities and personal information

Though Only 1 in 2 Consumers Do It Globally, Limiting Social Posts is Among the Top 3 Protective Actions Taken in All Countries

Top 3 Steps Taken To Protect Online Activities And Personal Information by Country

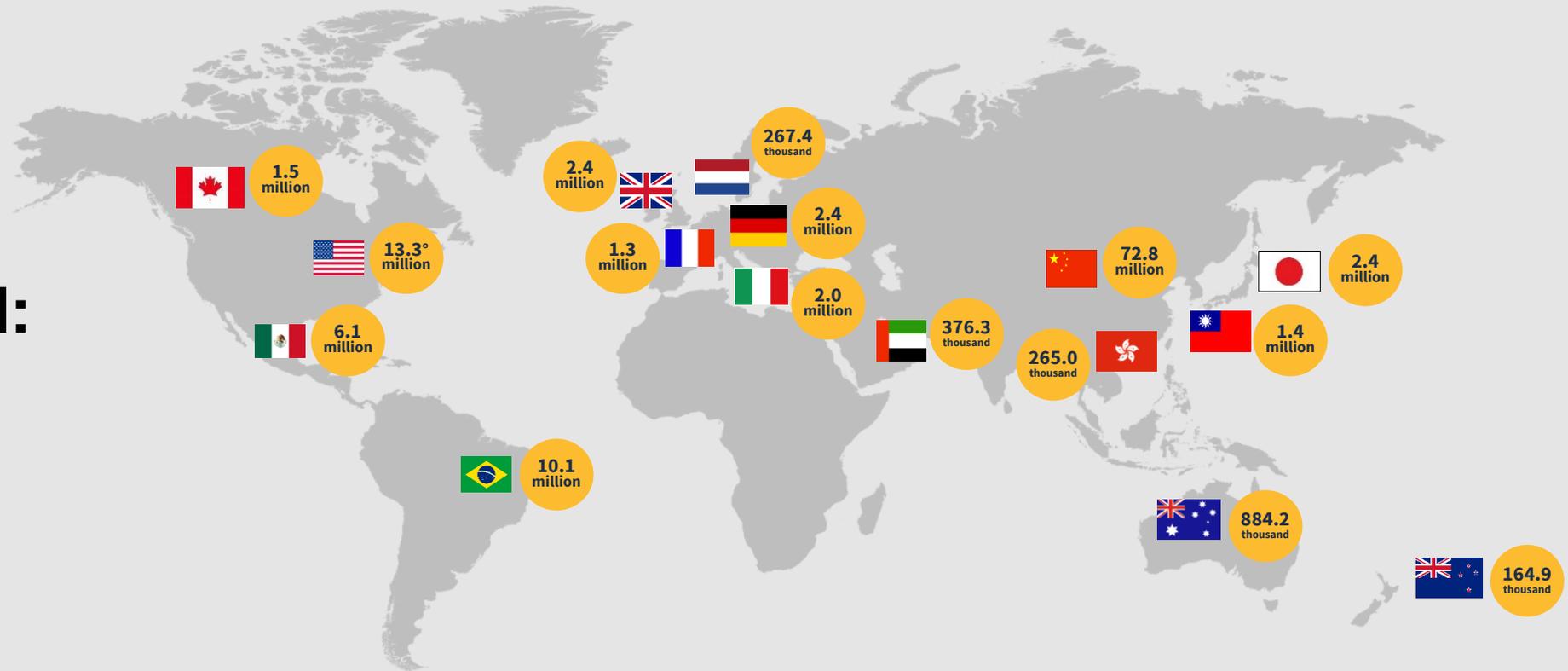


A child's hands are shown holding a smartphone, with the phone's screen glowing. The background is a dark blue gradient. The text is overlaid on the left side of the image.

Identity Theft: Incidence and Protecting Children

Over 117 Million Consumers* Were the Victim of Identity Theft Last Year

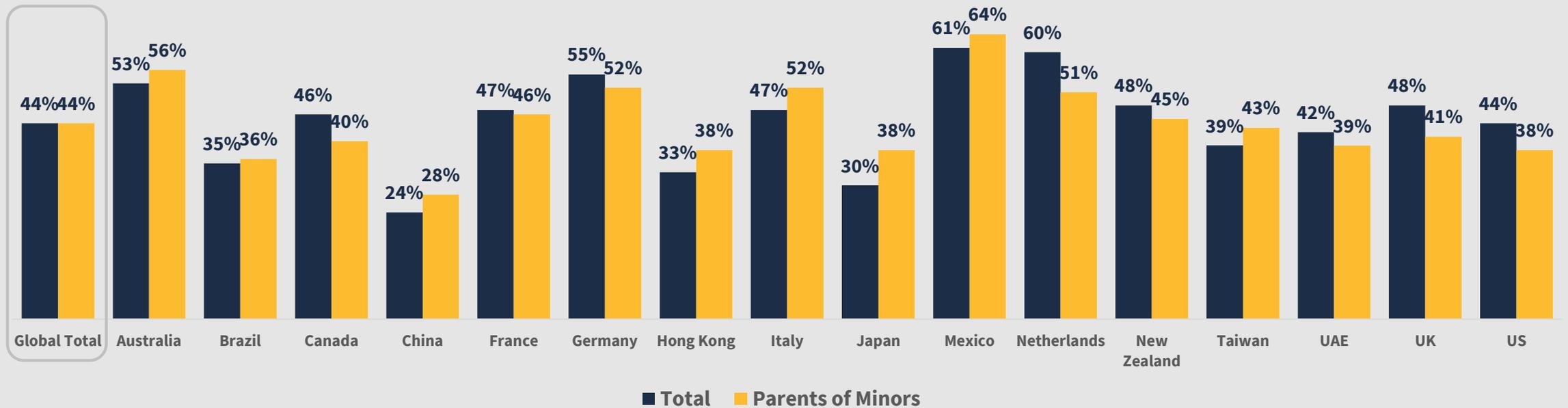
**Global 16
Country Total:
117.6 million**



**In 16 countries*

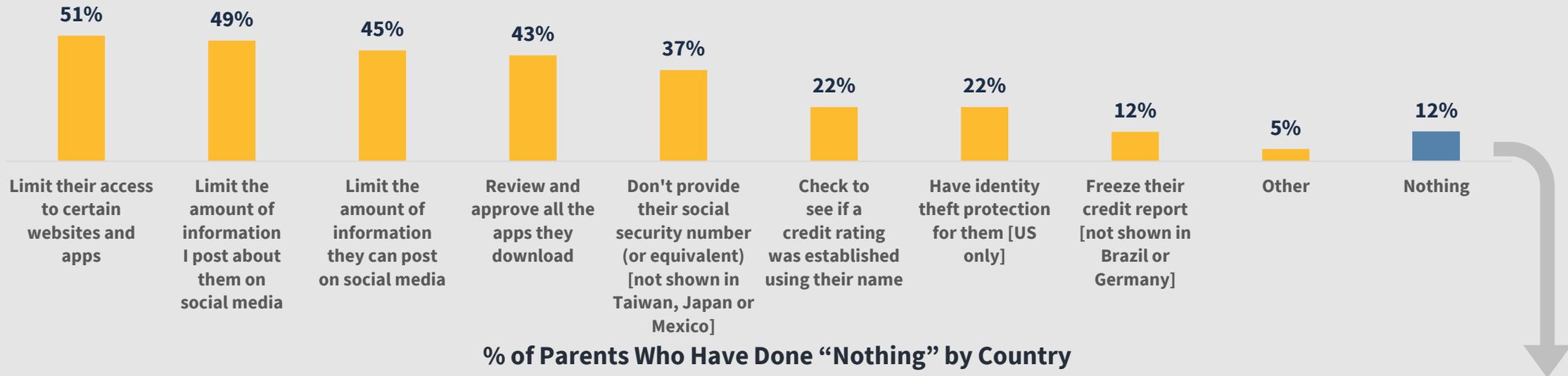
Majority (of Both Consumers and Parents) Don't Believe Youth Can Be ID Theft Victims, Though Certain Markets Are More in the Know: Australia, Germany, Mexico, Netherlands

% Believe Those Under 18 are at Risk of Identity Theft



Around the World, Parents Could be Doing More to Protect Their Children's Identity from Would-be Thieves

Steps Taken by Parents to Protect Children's Identity (Global Total, Parents of Minors)



% of Parents Who Have Done "Nothing" by Country

Australia	Brazil	Canada	China	France	Germany	Hong Kong	Italy	Japan	Mexico	Netherlands	New Zealand	Taiwan	UAE	UK	US
17%	5%	13%	7%	13%	14%	27%	8%	34%	2%	16%	17%	21%	3%	17%	13%

In line with their lower awareness of risk, parents in Japan and Hong Kong are most likely to have not taken any steps to protect their children's identity.

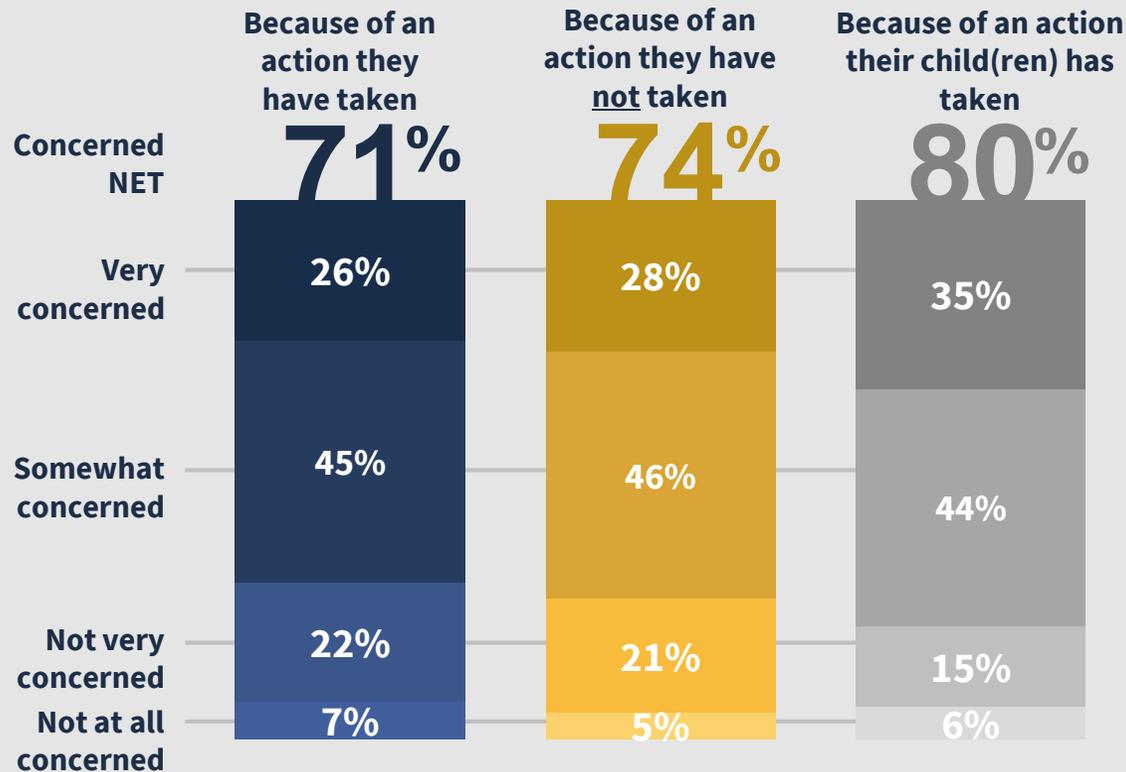
Similar to Their Own Protective Behaviors, Across All Countries, Limiting Social Posts (their child's and their own) is Among the Top Practices Parents Employ to Protect Their Children's Identity

Top 3 Actions Taken by Parents of Minors to Protect Children's Identity by Country



Most Parents Express Concern That Their Child Will Experience Identity Theft As a Result of An Action They Have or Their Child Has Taken

Global Total, Parents of Minors



% Very/Somewhat Concerned by Country
(among parents of minors)

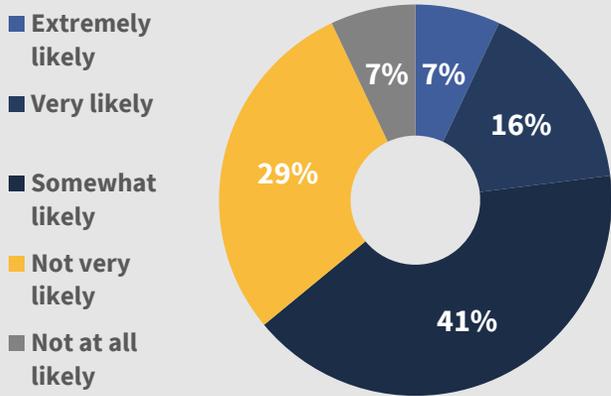
	An action you have taken	An action you have <u>not</u> taken	An action your child(ren) has taken
Australia	65%	67%	76%
Brazil	88%	85%	92%
Canada	56%	59%	67%
China	78%	86%	91%
France	73%	77%	79%
Germany	70%	70%	79%
Hong Kong	73%	76%	82%
Italy	59%	63%	77%
Japan	69%	74%	81%
Mexico	88%	90%	91%
Netherlands	46%	57%	62%
New Zealand	54%	61%	73%
Taiwan	84%	87%	87%
UAE	68%	73%	80%
UK	65%	68%	72%
US	67%	65%	68%



Cyber Crime: Incidence and Impact

Consumers, Especially in Parts of APAC, Are Generally Aware of Their Cyber Crime Risk

Likelihood of Experiencing Cyber Crime in the Next Year
(Global Total)



Percent of Consumers who Did Experience Cyber Crime* in Past 12 Months Globally **37%**

*Cyber crime is defined as having personally experienced a crime committed with devices over the internet, including, but not limited to, detecting unauthorized access on an online account, learning information was exposed in a data breach, and detecting malicious software on a device. For a full list, please visit <https://www.symantec.com/about/newsroom/press-kits/2018-norton-lifelock-cyber-safety-insights-report>. Please note, this definition is different than the definition used in past research.

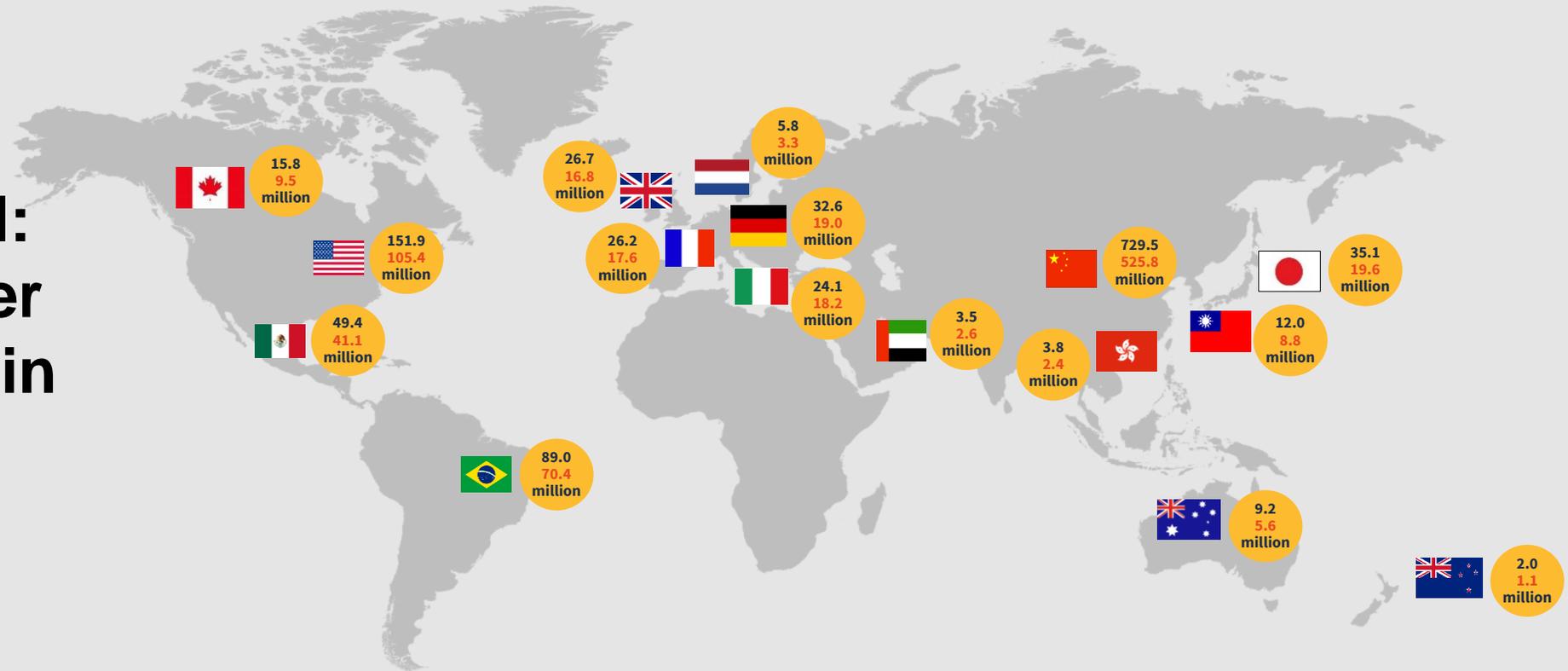
% Agree by Country

	% likely to experience cyber crime in next year	% who have experienced cyber crime in past year
Australia	55%	30%
Brazil	71%	46%
Canada	55%	32%
China	74%	48%
France	61%	34%
Germany	44%	28%
Hong Kong	77%	39%
Italy	40%	35%
Japan	77%	18%
Mexico	69%	48%
Netherlands	66%	24%
New Zealand	54%	33%
Taiwan	89%	44%
UAE	67%	54%
UK	62%	33%
US	65%	41%

With the exception of China, markets with the highest perceived risk are not the markets with the highest rates of cyber crime

Over 1 Billion Consumers* Have Ever Been the Victim of a Cyber Crime; More Than 800 Million in the Last Year Alone

**Global 16
Country Total:
1.2 billion ever
867.2 million in
the last year**



**In 16 countries*

On Average, Past Year Cyber Crime Victims Spent 6 Hours Resolving Issues and Nearly 2 in 5 Were Impacted Financially*



Globally, those who experienced cyber crime in the past year spent an average of

6* hours resolving it

**Average has been trimmed to remove outliers*



Report losses or theft due to cyber crime*

**Includes money lost or stolen, money that was stolen and returned, and money used to resolve the issue or repair/replace impacted device(s)*

Past Year Cyber Crime Victims in the UAE Suffered the Most Financially and In Time Lost; Resolution Tended to Be Least Costly in Japan

Hours Spent Resolving Cyber Crime by Country

	Australia	Brazil	Canada	China	France	Germany	Hong Kong	Italy	Japan	Mexico	Netherlands	New Zealand	Taiwan	UAE	UK	US
Average*	6.6	7.6	3.8	6.8	4.2	5.0	4.5	6.4	9.6	7.1	4.4	5.1	4.9	11.4	5.5	3.1
Median	2	2	2	2	2	2	2	2	0	2	2	2	1	4	2	2

% Who Spent A Week or More Resolving/Have Still Not Resolved Cyber Crime by Country

Australia	Brazil	Canada	China	France	Germany	Hong Kong	Italy	Japan	Mexico	Netherlands	New Zealand	Taiwan	UAE	UK	US
31%	26%	28%	33%	24%	32%	33%	27%	24%	23%	32%	32%	20%	36%	38%	37%

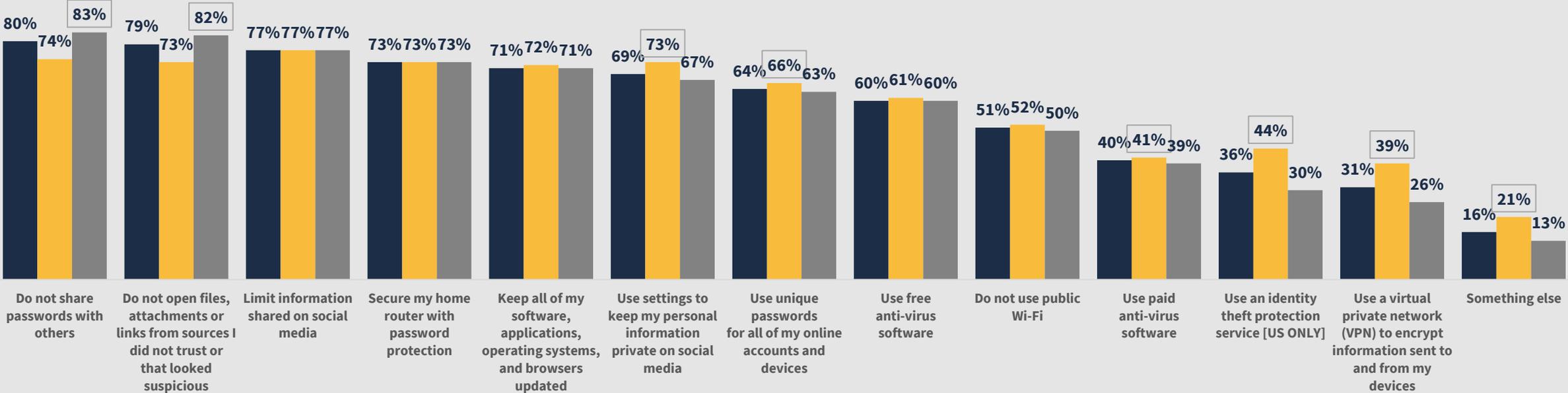
% Who Lost, Spent or Had Money Stolen Due to Cyber Crime* by Country

Australia	Brazil	Canada	China	France	Germany	Hong Kong	Italy	Japan	Mexico	Netherlands	New Zealand	Taiwan	UAE	UK	US
38%	42%	37%	35%	35%	33%	25%	39%	14%	45%	35%	31%	25%	59%	44%	40%

*Average has been trimmed to remove outliers

Large Majority Take Some Action to Protect Against Cyber Threats, but May be Missing Critical Steps For Comprehensive Protection

Steps Taken To Protect Against Threats or Attacks Against Devices, Identity, and Home Wi-Fi Network
(Global Total)



□ indicates statistically significant difference between cyber crime victims and non-cyber crime victims

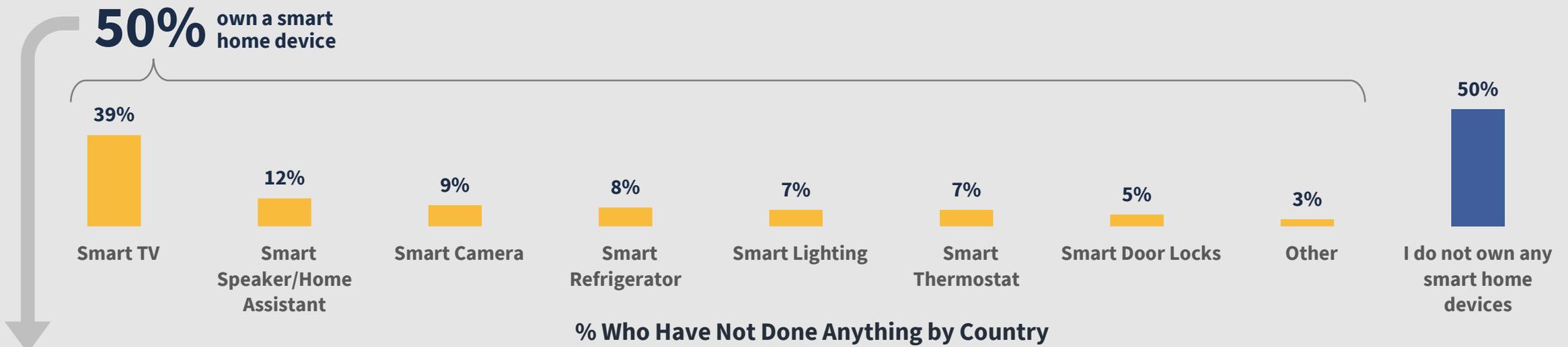
■ Total ■ Cyber Crime Victim in Past 12 Months ■ Not a Cyber Crime Victim

A hand holding a smartphone, with the text overlaid.

Smart Devices: Ownership And Knowledge

Half of Consumers Own a Smart Home Device, Most Commonly a Smart TV; Ownership Is Highest in UAE and Lowest in Japan

Smart Home Devices Owned (Global Total)



Australia	Brazil	Canada	China	France	Germany	Hong Kong	Italy	Japan	Mexico	Netherlands	New Zealand	Taiwan	UAE	UK	US
48%	56%	47%	63%	38%	46%	45%	55%	13%	58%	53%	47%	45%	80%	57%	57%


 countries above global average for smart TV ownership

Smart Devices May Be Outsmarting Their Owners as Significant Minority Don't Know that Devices Can Be Hacked

FALSE

26%

Of Consumers Globally Believe This to be True

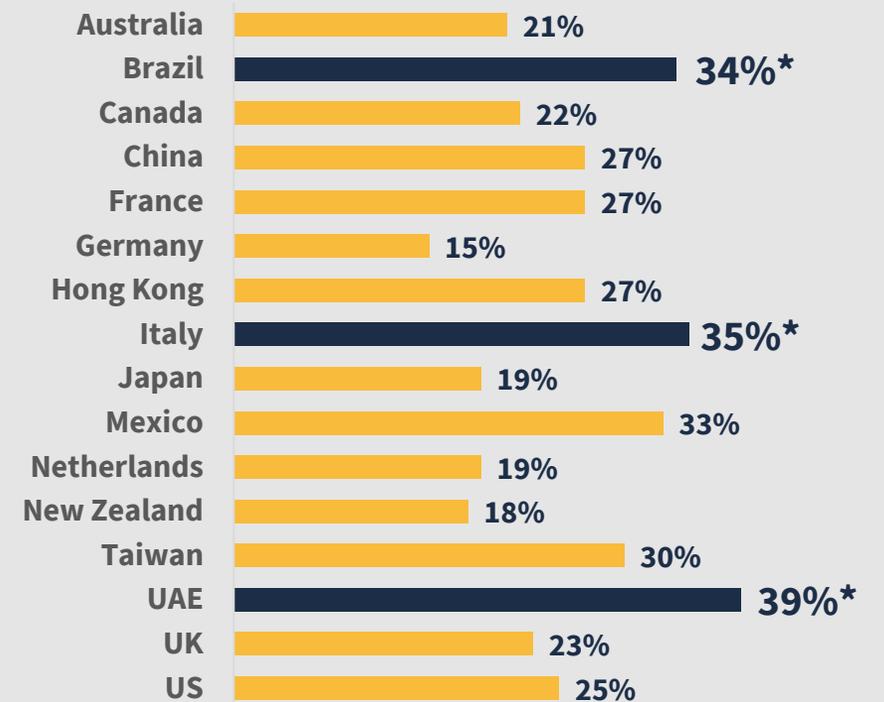


3 in 10

smart device owners

(30%) don't know that their smart devices can be hacked!

% Incorrect by Country



*Though still a minority, those in the UAE, Italy, and Brazil are most likely to not be aware that smart devices can be hacked

More than **4 in 10** Smart Door Lock Users are Unaware that Someone Can Gain Unauthorized Access and Break In

70%

Of Global Consumers Know This



30%

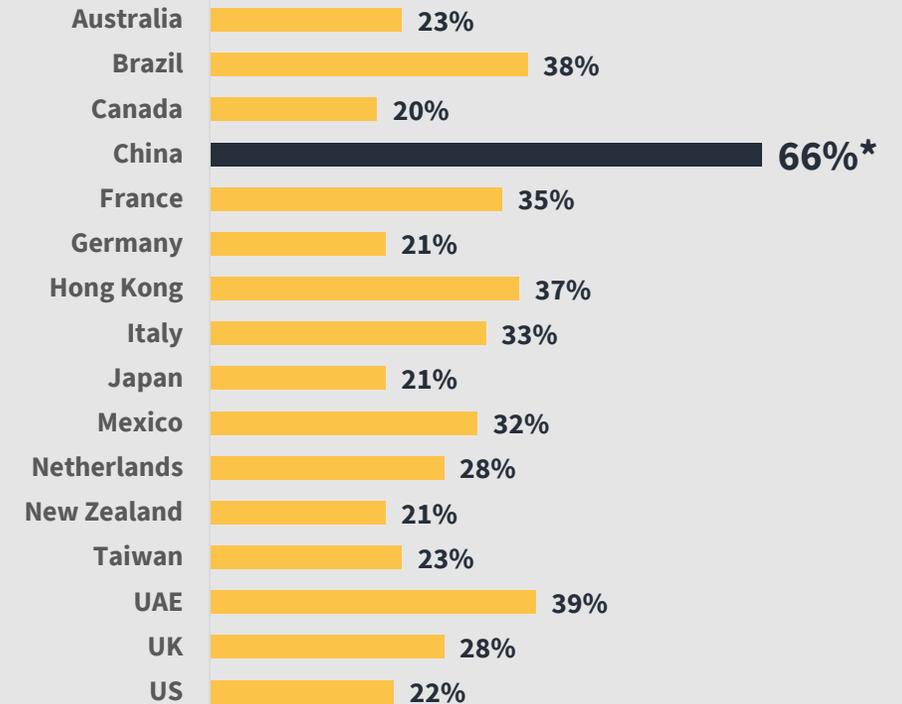
Do Not

Including

44%

Of Smart Lock Owners

% Incorrect by Country



*Those in China are most likely to be unaware that someone can gain unauthorized access to smart door locks

1 in 4

Consumers are Unaware that Unauthorized Access to One's Email Account Could Lead To Access To All Linked Devices

FACT

If someone gains unauthorized access to an email account, all the devices that are linked to that email could be accessed

75%

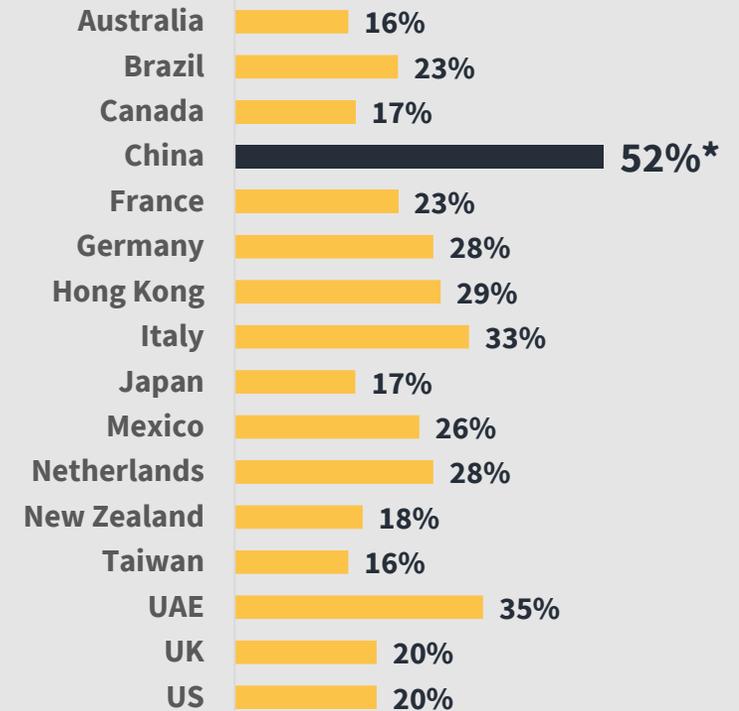
Of Consumers Globally Know This



25%

Do Not

% Incorrect by Country



*Those in China are least likely to know how vulnerable linked devices may be

3 in 10 Consumers Are Unaware that Someone Can Gain Unauthorized Access To Smart Baby Monitors

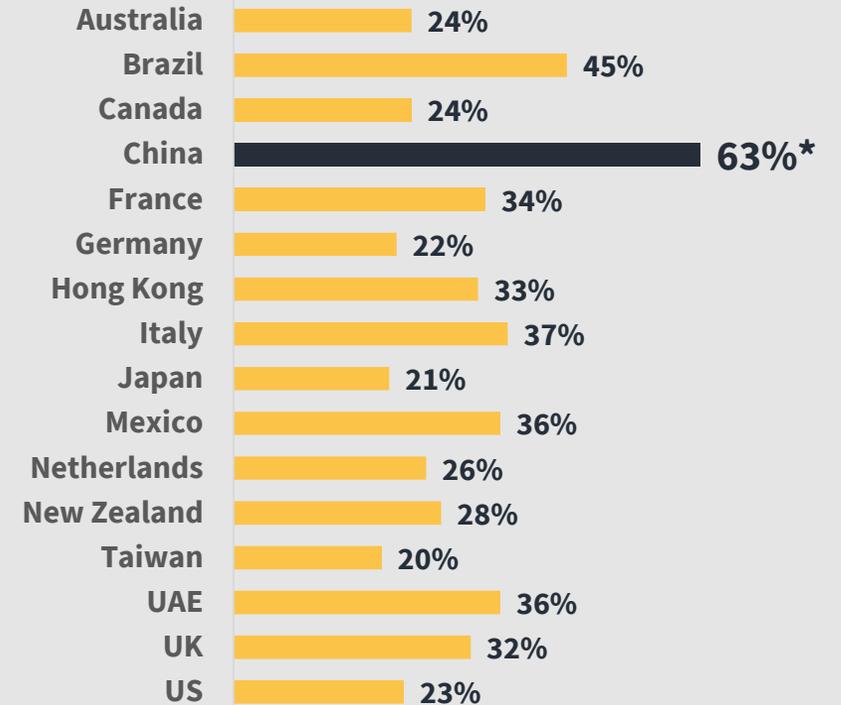
Someone Can Gain Unauthorized Access To Smart Baby Monitors To Spy On Children



31%

Of Global Consumers are **Incorrect**

% Incorrect by Country



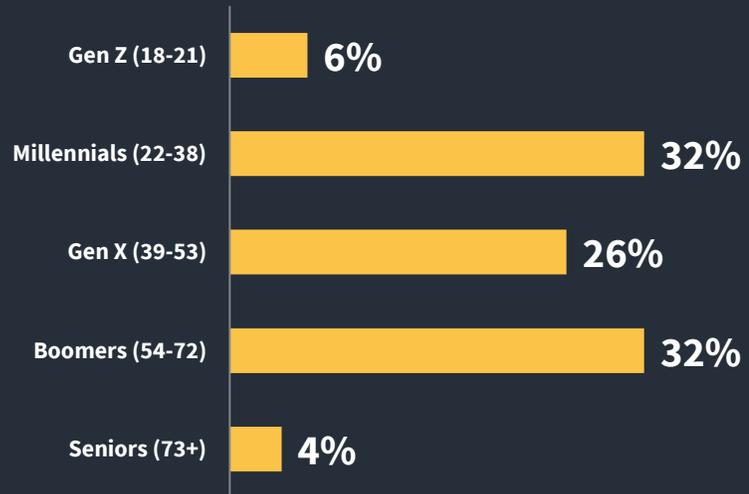
*Again, those in China are most likely to be unaware that devices can be accessed



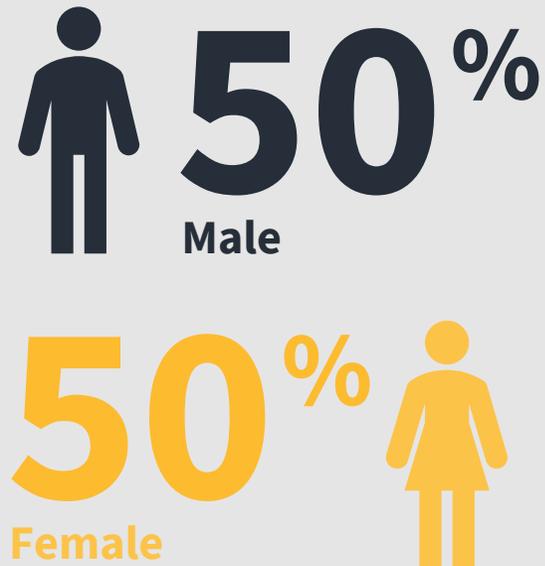
Demographics

Global Demographics

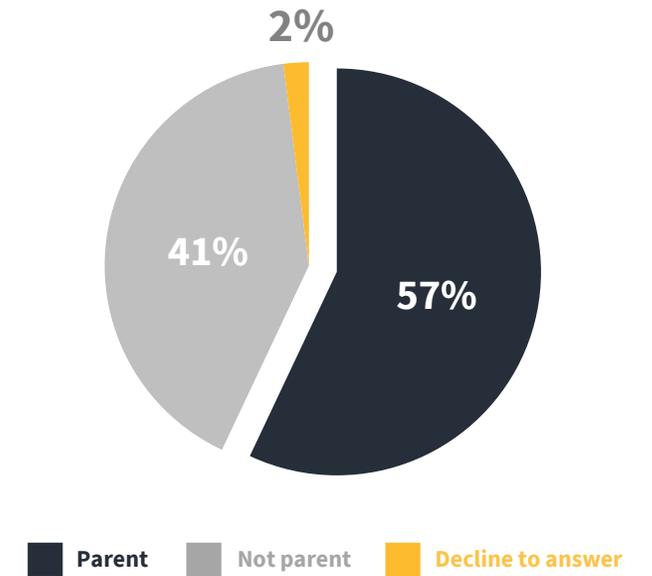
Age



Gender



Parent Status

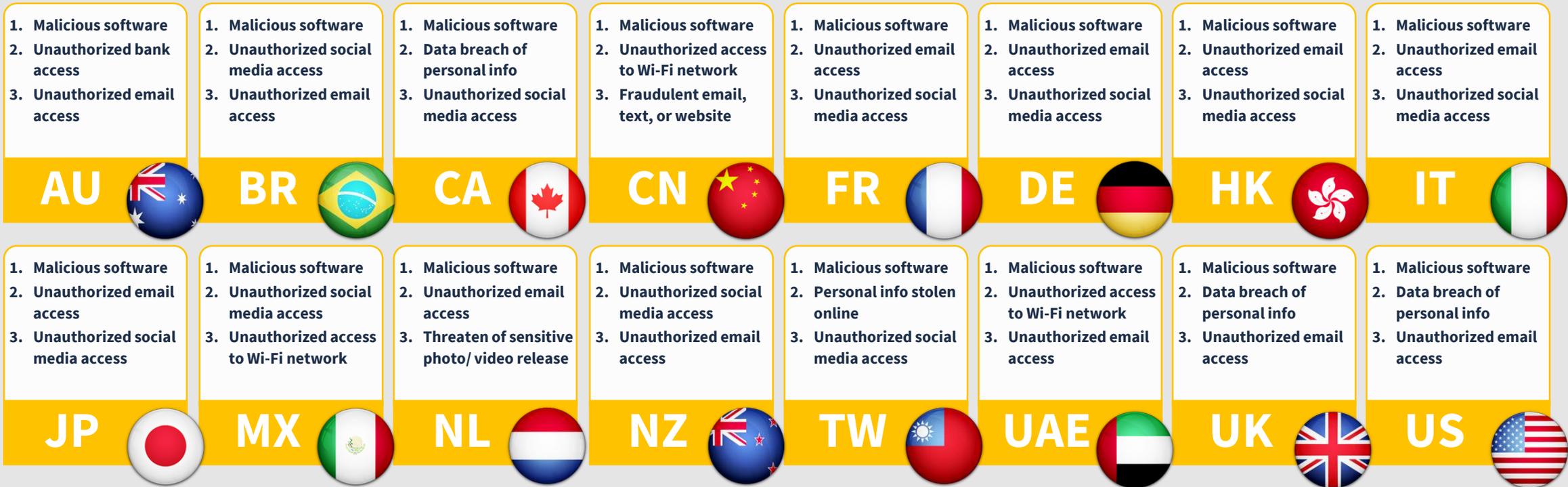


A person is sitting at a desk, viewed from behind. They are wearing glasses and a watch. On the desk in front of them is an open laptop, a smartphone, a cup of coffee on a saucer, and a spiral notebook. The person's hands are resting on the notebook. The background shows a window with a grid pattern.

Appendix

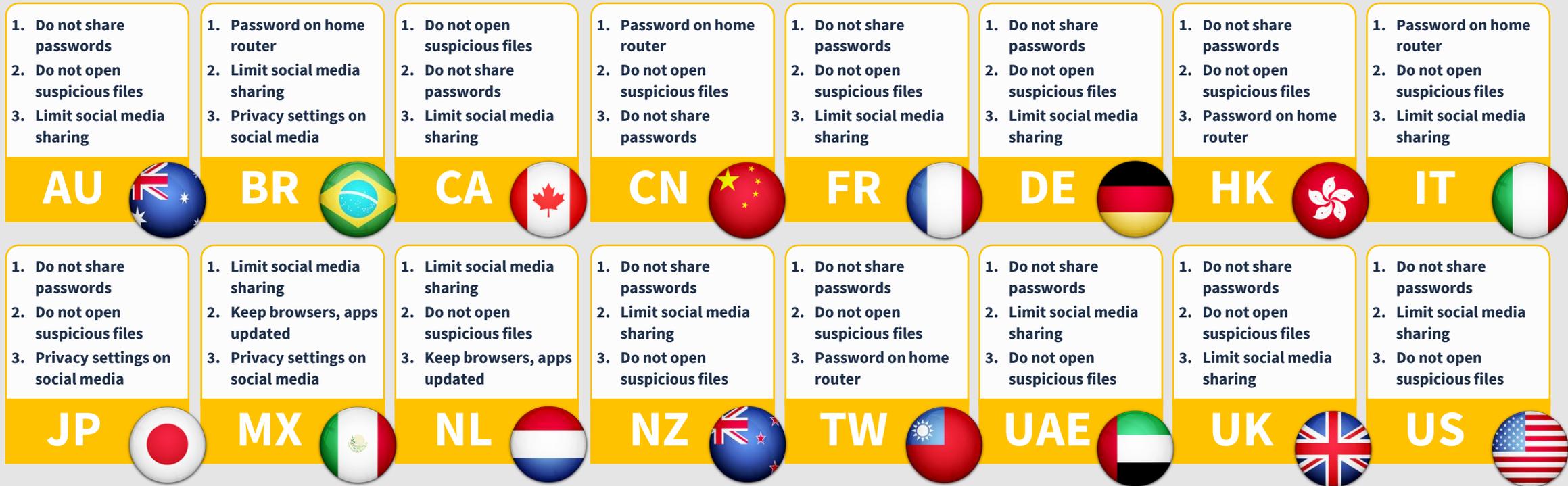
In All 16 Countries, Detecting Malicious Software Was the Most Common Cyber Crime Experienced in the Past 12 Months

Top 3 Cyber Crimes Experienced in Past 12 Months by Country

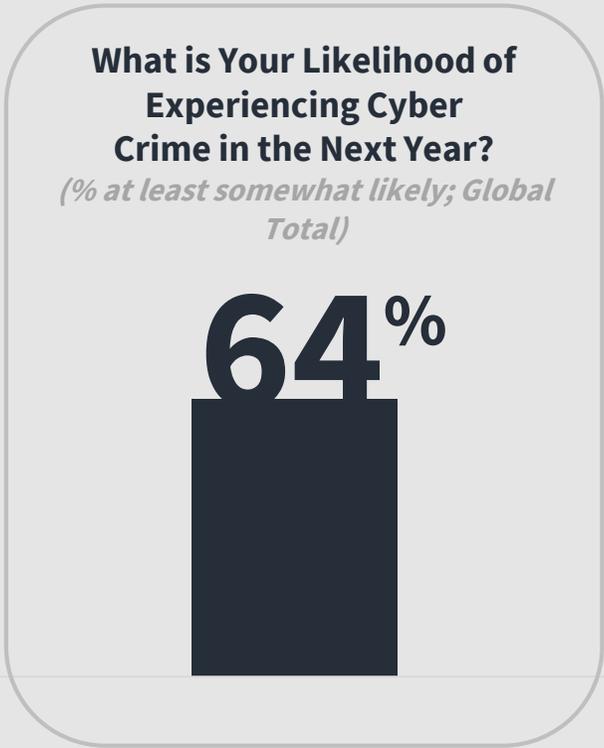


Most Popular Cyber Defense Actions Vary Across Countries, But Not Opening Suspicious Files/Links and Not Sharing Passwords Consistently Top the List

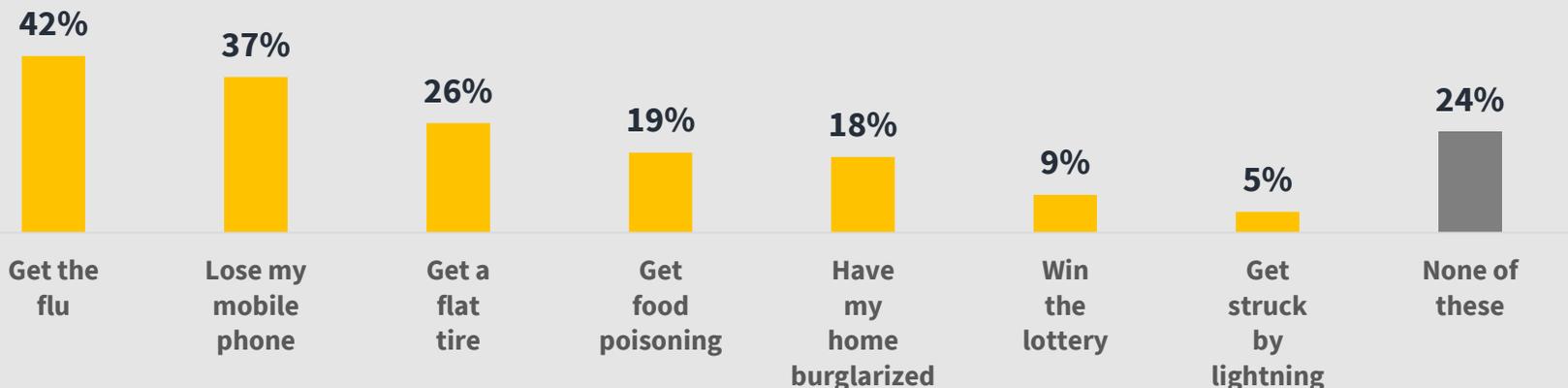
Top 3 Steps Taken to Protect Devices, Identity, or Wi-Fi Networks by Country



Nearly **2 in 3** Consumers Believe It Is Likely That They Will Experience Cyber Crime in the Next Year



Which of the Following are You More Likely to Experience than Cyber Crime? *(Global Total)*



Half of Parents With Children Ages 5-17 Report That Their Child Has Had a Negative Online Experience, Including Downloading a Malicious Program or Virus or Found Them Looking at Inappropriate Content

Children's Online Experiences *(Global Total; Parents of 5-17 Year Olds)*

