



Norton Online Living Report (NOLR)
KEY FINDINGS

****UNDER EMBARGO UNTIL FEBRUARY 13, 2008****

Background and Objectives

Symantec, the world's leading Internet security solutions provider, and research firm Harris Interactive Survey, conducted the **Norton Online Living Report (NOLR)** among online users (adults and children) in the following countries: U.S., UK, Australia, Germany, France, Brazil, China and Japan. To become part of the sample, adult online users were defined as adults age 18 or older who spend one hour or more online each month, while online children were defined as children aged 8 to 17 who spend one hour or more online each month.

In total, we interviewed 4,687 online adults and 2,717 online children, broken out as follows:

Country	Adults	Children
U.S.	512	438
UK	619	328
Australia	517	322
Germany	580	333
France	549	326
Brazil	707	322
China	602	322
Japan	601	326
Total	4,687	2,717

The research was conducted from November 27th to December 28th, 2007.

In all countries surveyed, adults and children were interviewed online and received an email, inviting them to take a password-protected survey online. The survey averaged approximately 15 minutes in length for adults and 5 minutes for youth.

Detailed Survey Findings

Overview

The Internet no longer represents the “new frontier.” Rather, in our 2007 snapshot, it appears to have transcended every sphere of people’s lives – the social, the inter-personal, and the intellectual. In most countries, online adults typically spend 30 to 60 hours – or almost a full work week – on the Internet each month (and in China, 100 hours). Most online children are keeping pace as well, with most typically spending about 20 to 30 hours on the Internet each month.

It is clear that the Internet has permeated the way we do business, the way we share and gather information, and the way we define our friendships. However, the vast majority of online users recognize the potential vulnerability of interacting in a virtual world, and they express hesitation about providing personal information online. That said, they continue to do so routinely and have taken only modest steps to protect themselves.

The following memo provides additional detail around each of these key themes:

Communicating

The Internet has become almost second nature as a form of communication for online users. Email is now a conventional way for people to keep in touch and it appears that almost everyone is using it. Moreover, the vast majority in almost all countries surveyed express a great deal of comfort in doing so – though the Japanese appear to be slightly more wary.

Traditional channels of communication like the telephone have also begun to be adapted to match our new reality. The majority of online adults (except those in the U.S. and Japan) spend at least 1 hour per month sending text messages from their cell phone. And about 30% of online users (more in China) have created their own blog to disseminate information about themselves (or issues they care about) into the public domain.

- Nearly all adults across all countries email at least sometimes.
 - U.S. 98%, UK 99%, Australia 99%, Germany 99%, France 99%, Brazil 99%, China 99%, Japan 97%
- Most adults feel confident about emailing.
 - U.S. 91%, UK 92%, Australia 96%, Germany 67%, France 71%, Brazil 65%, China 88%, Japan 53%
- Most online adults (except in the U.S. and Japan) spend at least 1 hour per month sending text messages from their cell phone
 - U.S. 39%, UK 79%, Australia 69%, Germany 60%, France 60%, Brazil 61%, China 75%, Japan 25%
- About 1 in 5 adults – though substantially more in Brazil, China and Japan – work on their personal blog at least sometimes.
 - U.S. 20%, UK 19%, Australia 17%, Germany 13%, France 18%, Brazil 44%, China 87%, Japan 38%

Socializing

For online users globally, no longer does the offline world represent the only medium for making friends and developing relationships. Brazil and China in particular outpace other countries in being socially active online.

In general, about half of adults, and slightly fewer children, have made friends online – and, of those, many (about 70%) have translated these online friendships to their offline world. About 50% of online adults even admit that they prefer their online friendships the same amount or more than their offline ones. And, about 15% say they feel comfortable socializing with strangers when they are online.

- About 23% of adults are confident or very confident in socializing with strangers online.
 - U.S. 21%, UK 28%, Australia 29%, Germany 21%, France 16%, Brazil 10%, China 44%, Japan 13%
- In most countries, slightly fewer online children than adults are confident in socializing with strangers online – except in Brazil and China.
 - U.S. 10%, UK 17%, Australia 21%, Germany 17%, France 14%, Brazil 17%, China 63%, Japan 9%
- Across countries, about 40% of online adults and children, but about 80% in China, use social network sites at least sometimes.
 - Adults: U.S. 47%, UK 52%, Australia 47%, Germany 36%, France 35%, Brazil 58%, China 78%, Japan 44%
 - Children: U.S. 46%, UK 62%, Australia 54%, Germany 35%, France 39%, Brazil 54%, China 85%, Japan 23%
- About 45% of online adults have made friends online, more so in Brazil and China and less in France.
 - U.S. 45%, UK 42%, Australia 54%, Germany 45%, France 31%, Brazil 77%, China 84%, Japan 38%
- A largely similar number of online children, about 35%, but much more so in China and Brazil and less in Japan, have made friends online.
 - U.S. 35%, UK 44%, Australia 44%, Germany 31%, France 32%, Brazil 74%, China 88%, Japan 20%
- Among those online adults who have made friends online, approximately 50% either enjoy their online friends just as much if not more than their offline friends, except for Germany, France, and Japan where it is slightly fewer.
 - U.S. 44%, UK 43%, Australia 52%, Germany 35%, France 25%, Brazil 60%, China 49%, Japan 33%
- The majority of adult users who have made friends online have translated at least one online friend into an offline friend.
 - U.S. 66%, UK 72%, Australia 65%, Germany 86%, France 85%, Brazil 83%, China 77%, Japan 55%

Living

For a large majority of online users, the Internet represents a way to have fun. In most countries, many online users at least sometimes entertain themselves by downloading music, following sports, sharing videos, playing games, and reading entertainment and restaurant reviews. And, as with socializing, Brazil and China surpass the other countries in their usage of, and comfort with, the Internet as a source of recreation.

While the movement from traditional to “hi-tech” appears to be happening slightly less quickly than with basic communication via email, it seems this trend will only continue to grow as each generation ages. Most adult users still watch TV through a traditional television set, but about half of adult users in most countries (with over 7 in 10 in Brazil, China and Japan) say they also use another source to watch movies, television shows, or videos for at least one hour per month. Further, children seem to be seizing the Internet as a source of entertainment, specifically with regard to playing games, even more so than adults.

- The majority of adult users in all countries surveyed own either a digital camcorder or digital music player.
 - Digital camcorder (U.S. 73%, UK 82%, Australia 77%, Germany 75%, France 81%, Brazil 77%, China 68%, Japan 71%)
 - Digital music player (U.S. 48%, UK 55%, Australia 51%, Germany 52%, France 60%, Brazil 73%, China 82%, Japan 41%)
- About 4 in 10 adult users, except in Germany, own a video game console.
 - U.S. 38%, UK 39%, Australia 37%, Germany 24%, France 44%, Brazil 39%, China 41%, Japan 45%
- In all countries except Germany and Japan, majorities (substantially more so in Brazil and China) at least download music sometimes.
 - Adults (U.S. 56%, UK 58%, Australia 57%, Germany 40%, France 51%, Brazil 88%, China 97%, Japan 40%)
 - Children (U.S. 56%, UK 65%, Australia 73%, Germany 50%, France 56%, Brazil 89%, China 98%, Japan 47%)
- In all countries except France, majorities of online adults follow sports online sometimes. While fewer children in all countries, except for China, do the same, a substantial minority are following sports online at least sometimes. Users in Brazil and China are especially likely to follow sports online.
 - Adults (U.S. 62%, UK 61%, Australia 62%, Germany 50%, France 40%, Brazil 83%, China 81%, Japan 75%)
 - Children (U.S. 38%, UK 44%, Australia 50%, Germany 40%, France 42%, Brazil 73%, China 87%, Japan 45%)
- A vast majority of online users, especially in Brazil and China, visit video-sharing websites at least sometimes.
 - Adults (U.S. 66%, UK 59%, Australia 60%, Germany 51%, France 72%, Brazil 88%, China 93%, Japan 59%)
 - Children (U.S. 70%, UK 76%, Australia 75%, Germany 56%, France 75%, Brazil 89%, China 91%, Japan 57%)
- The majority play games, Chinese adults especially, but children more so than adults.
 - Adults (U.S. 74%, UK 65%, Australia 71%, Germany 65%, France 71%, Brazil 78%, China 94%, Japan 64%)

- Children (U.S. 96%, UK 97%, Australia 95%, Germany 94%, France 95%, Brazil 95%, China 99%, Japan 91%)
- Majorities read entertainment and restaurant reviews at least sometimes, but children less so than adults.
 - Adults (U.S. 80%, UK 78%, Australia 78%, Germany 81%, France 81%, Brazil 92%, China 97%, Japan 72%)
 - Children (U.S. 62%, UK 66%, Australia 63%, Germany 68%, France 71%, Brazil 79%, China 91%, Japan 55%)

Informing

The Internet now equals – if not exceeds – the offline world as a source of key information about the world we live in. Online users spend nearly the same amount of time consuming news online as they do offline, and most spend some time each month accessing information-sharing, video-sharing, and photo-sharing sites. Most online users read other people’s blogs at least sometimes and use the Internet to get advice about various aspects of daily life ranging from fashion to travel to news.

- A large majority of online adults spend at least one hour per month both reading news from online sites or blogs and from a printed newspaper or magazine.
 - News from online sites or blogs (U.S. 77%, UK 66%, Australia 75%, Germany 71%, France 76%, Brazil 93%, China 92%, Japan 83%)
 - News from printed newspaper or magazine (U.S. 79%, UK 78%, Australia 87%, Germany 86%, France 84%, Brazil 90%, China 92%, Japan 84%)
- Vast majorities of online users, except for about half of children in the U.S., UK, and Australia, follow or read news online at least sometimes.
 - Adults (U.S. 88%, UK 90%, Australia 89%, Germany 93%, France 90%, Brazil 98%, China 98%, Japan 92%)
 - Children (U.S. 51%, UK 51%, Australia 50%, Germany 79%, France 79%, Brazil 87%, China 95%, Japan 59%)
- Most online users, except for about half of those in the U.S., UK, Australia, and Germany, read someone else’s blog at least sometimes.
 - Adults (U.S. 49%, UK 49%, Australia 54%, Germany 44%, France 63%, Brazil 86%, China 97%, Japan 79%)
 - Children (U.S. 44%, UK 55%, Australia 54%, Germany 43%, France 73%, Brazil 82%, China 94%, Japan 58%)
- A large majority of online children get information for school projects from the Internet at least sometimes.
 - U.S. 94%, UK 95%, Australia 96%, Germany 93%, France 93%, Brazil 99%, China 93%, Japan 77%
- About 3 to 4 in 10 of most online users, except for majorities in Brazil and China, at least sometimes get beauty and/or fashion advice online.
 - Adults (U.S. 32%, UK 35%, Australia 34%, Germany 36%, France 39%, Brazil 69%, China 82%, Japan 49%)
 - Children (U.S. 34%, UK 40%, Australia 25%, Germany 36%, France 43%, Brazil 53%, China 74%, Japan 31%)

Buying

No longer do online users feel they must touch, try, hear, and taste the products they want to buy. Around the world, there is a relatively high degree of confidence with making purchases online, despite the fact that most online users express skepticism about the security of the online world and caution in providing their personal and financial information over the Internet (as discussed below).

Almost all online users, especially those in the UK, say they shop online at least sometimes. It is likely that comfort with shopping online varies based on the type and cost of the purchase being made (our survey didn't explore this), but we imagine in the not-so-distant future that even these distinctions in online commerce will melt away.

- Half of online users feel confident shopping online, though confidence is higher in U.S. and UK, and lower in Japan.
 - U.S. 63%, UK 78%, Australia 55%, Germany 46%, France 53%, Brazil 40%, China 55%, Japan 33%
- About 3 in 10 online adults, but more in the UK and China, and less in Japan, feel very confident or confident sharing personal information when shopping online
 - U.S. 30%, UK 47%, Australia 33%, Germany 30%, France 37%, Brazil 31%, China 49%, Japan 18%
- The vast majority of adult users shop online at least sometimes.
 - U.S. 90%, UK 96%, Australia 84%, Germany 93%, France 89%, Brazil 80%, China 86%, Japan 90%
- About 2 to 3 in 5 children, but many more in China shop online at least sometimes.
 - U.S. 49%, UK 54%, Australia 45%, Germany 61%, France 52%, Brazil 55%, China 84%, Japan 41%
- Vast majorities of online adults have bought something online at some point
 - U.S. 63%, UK 79%, Australia 76%, Germany 78%, France 66%, Brazil 79%, China 71%, Japan 82%

Banking

While personal finance lags slightly behind commerce as an Internet activity, majorities of online users in all countries are handling some of their most basic financial transactions, such as banking and paying bills, online. Investments are generally conducted online to a slightly lesser degree, but as with more complicated shopping transactions, this is likely to be the direction of the future as it appears to be in China.

- About 3 to 4 in 5 online adults bank or pay bills online at least sometimes
 - U.S. 79%, UK 85%, Australia 81%, Germany 78%, France 84%, Brazil 68%, China 87%, Japan 74%
- About 3 in 10 online adults, but much more so in Brazil and China, manage financial investments online at least sometimes
 - U.S. 45%, UK 54%, Australia 44%, Germany 33%, France 36%, Brazil 56%, China 72%, Japan 33%

Exploring

Despite the variety and depth of current online activities, both adults and kids alike express a high degree of caution about using the Internet. And some of this hesitation appears to be justifiable as many online adults and children have experienced a wide range of violations (from the “minor” like receiving email advertisements from strangers to the “major” like attempts to hack into their computers).

However, it appears that there is disconnect between concern and action as majorities of online users – both youth and adults – are not taking many steps, beyond the most basic, to protect themselves online. Aside from security software (which almost everyone feels vulnerable surfing the Internet without), less than half have taken multiple steps to protect their privacy or secure their information, such as using only “trusted” sites or changing their passwords frequently. And, as mentioned, most online adults say they are not that comfortable sharing personal information online, yet many routinely do so.

Japanese users stand out from the pack in that they are the least likely to take actions to protect themselves online.

- Most online adults, but fewer in China, feel somewhat or not at all confident sharing personal information online.
 - U.S. 77%, UK 62%, Australia 77%, Germany 81%, France 72%, Brazil 80%, China 52%, Japan 95%
- A large majority of online adults are somewhat or not at all confident surfing the Internet without security software.
 - U.S. 89%, UK 88%, Australia 92%, Germany 95%, France 94%, Brazil 91%, China 81%, Japan 93%
- Majorities have shared less innocuous information such as email address and name with people who are not their friends or acquaintances

- Email (U.S. 71%, UK 66%, Australia 78%, Germany 85%, France 74%, Brazil 79%, China 86%, Japan 60%)
- Name (U.S. 66%, UK 57%, Australia 73%, Germany 71%, France 57%, Brazil 69%, China 77%, Japan 57%)
- However, about a quarter have shared credit card information with people who are not their friends or acquaintances
 - (U.S. 34%, UK 29%, Australia 27%, Germany 19%, France 28%, Brazil 13%, China 15%, Japan 21%)
- Further, about 1 to 2 in 10 users have shared bank or investment account information with people who are not their friends or acquaintances
 - (U.S. 16%, UK 10%, Australia 13%, Germany 21%, France 6%, Brazil 7%, China 15%, Japan 23%)
- A large majority of adult users have installed security software and run virus scans, but fewer have used multiple email addresses, surfed only trusted sites, and changed their passwords frequently
 - Installed security software (U.S. 71%, UK 82%, Australia 84%, Germany 85%, France 75%, Brazil 85%, China 75%, Japan 61%)
 - Run frequent virus scans (U.S. 75%, UK 81%, Australia 86%, Germany 76%, France 77%, Brazil 88%, China 82%, Japan 45%)
 - Used multiple email addresses (U.S. 42%, UK 39%, Australia 42%, Germany 57%, France 49%, Brazil 43%, China 48%, Japan 34%)
 - Surfed only trusted sites (U.S. 48%, UK 45%, Australia 48%, Germany 32%, France 49%, Brazil 75%, China 53%, Japan 56%)
 - Changed passwords frequently (U.S. 22%, UK 30%, Australia 38%, Germany 25%, France 21%, Brazil 51%, China 39%, Japan 13%)

Protecting

Most parents express a great deal of concern about the potential threats that their children may face when surfing the Internet. But far fewer are taking any tangible steps such as setting parental controls to protect their children’s safety. This disconnect is especially troubling given the substantial minority of children who have experienced violations, both minor and major, online. Further, most parents appear to underestimate the prevalence of these threats.

A potentially positive sign is that parents and children seem to talk openly about what kids are doing online. However, parents may be too optimistic, especially in Japan, in thinking that little bad will occur in the absence of proactive measures. It seems parents need to be fully educated about the proper steps they can take – and then translate these to action – so they can appropriately guide their children.

- Majorities of parents are concerned about their children being approached with inappropriate content or solicitations online.
 - U.S. 79%, UK 72%, Australia 72%, Germany 71%, France 90%, Brazil 87%, China 90%, Japan 82%
- About half or more children, especially in Brazil and China are concerned about being approached online.
 - U.S. 55%, UK 52%, Australia 60%, Germany 51%, France 59%, Brazil 73%, China 76%, Japan 63%

- Majorities of parents, except in Japan, believe the Internet is not as safe for children as adults.
 - U.S. 88%, UK 78%, Australia 86%, Germany 83%, France 77%, Brazil 80%, China 69%, Japan 44%
- Most online children, except in China and Japan, do not believe the Internet is as safe for children as it is for adults.
 - U.S. 69%, UK 61%, Australia 63%, Germany 61%, France 63%, Brazil 60%, China 34%, Japan 48%
- Less than half of parents, and substantially fewer in Japan, have set parental controls on their computer and spied on their children's internet usage.
 - Set parental controls on family's computer (U.S. 48%, UK 37%, Australia 40%, Germany 23%, France 32%, Brazil 32%, China 39%, Japan 5%)
 - Spied on child's online usage (U.S. 31%, UK 20%, Australia 23%, Germany 17%, France 41%, Brazil 39%, China 25%, Japan 7%)
- Overall, parents appear to underestimate how often their children encounter indiscretions online, such as receiving requests for personal information, being approached online by a stranger, and experiencing cyber pranks.
 - Receiving requests for personal information
 - Adults (U.S. 9%, UK 4%, Australia 15%, Germany 12%, France 5%, Brazil 20%, China 23%, Japan 3%)
 - Children (U.S. 25%, UK 25%, Australia 30%, Germany 29%, France 23%, Brazil 49%, China 57%, Japan 6%)
 - Experiencing cyber pranks
 - Adults (U.S. 2%, UK 4%, Australia 5%, Germany -, France 7%, Brazil 19%, China 2%, Japan 2%)
 - Children (U.S. 13%, UK 17%, Australia 18%, Germany 9%, France 24%, Brazil 47%, China 39%, Japan 9%)
 - Being approached online by a stranger
 - Adults (U.S. 6%, UK 4%, Australia 4%, Germany 9, France 2%, Brazil 17%, China 16%, Japan 5%)
 - Children (U.S. 16%, UK 20%, Australia 18%, Germany 24%, France 27%, Brazil 38%, China 44%, Japan 13%)
- A quarter to a third of parents, but over 40% in Japan, don't know what their kids are looking at online.
 - U.S. 21%, UK 25%, Australia 23%, Germany 33%, France 26%, Brazil 34%, China 29%, Japan 43%
- About 1 in 5 children, more so in China, say they do things online their parents would not approve of.
 - U.S. 20%, UK 19%, Australia 27%, Germany 17%, France 16%, Brazil 29%, China 55%, Japan 16%
- About half of parents, but more so in Brazil and China and far fewer in Japan, have spoken to their children about practicing safe online habits.
 - U.S. 50%, UK 44%, Australia 59%, Germany 45%, France 54%, Brazil 59%, China 71%, Japan 22%