



October 2022

# 2022 Cyber Safety Insights Report

## Global Results: Online Holiday Shopping

Prepared By:  **The Harris Poll**  
Harris Insights & Analytics LLC, A Stagwell Company

# Survey Method

The research was conducted online by The Harris Poll on behalf of Norton LifeLock among 8,022 adults (aged 18+) in 8 countries. The survey was conducted August 15 – September 1, 2022 in the United States (n=1,000), the United Kingdom (n=1,005), Australia (n=1,005), New Zealand (n=1,001), India (n=1,001), France (n=1,001), Germany (n=1,004), and Japan (n=1,005).

Data are weighted where necessary to bring them in line with their actual proportions in the population; India was weighted to the population of those who are online. Weighted variables varied by country and included one or more of the following: age, gender, race/ethnicity, region, education, marital status, internet usage, household size, household income, size of place, and propensity to be online. A global postweight was applied to ensure equal weight of each country in the global total.

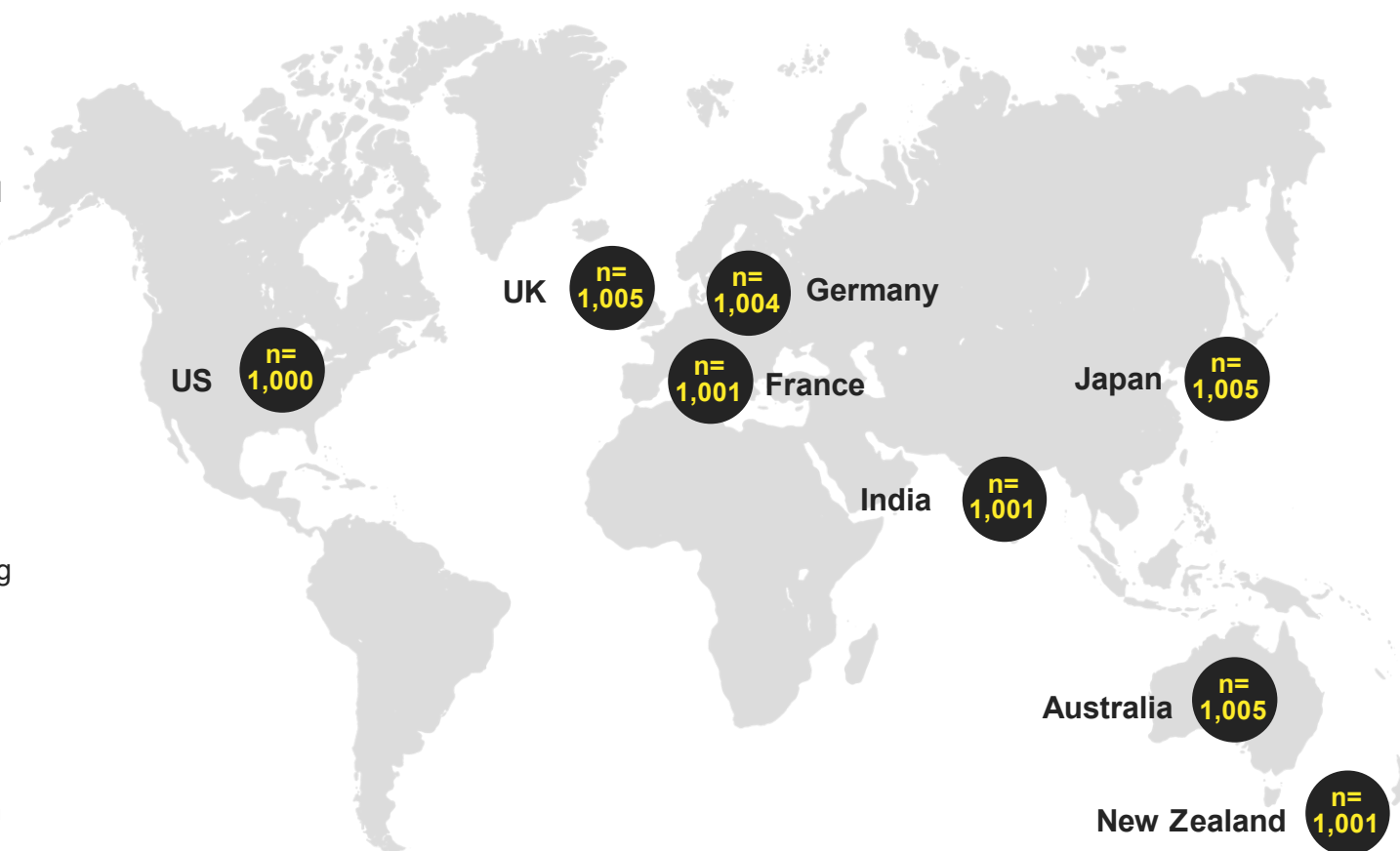
Respondents for this survey were selected from among those who have agreed to participate in our surveys. The sampling precision of Harris online polls is measured by using a Bayesian credible interval. For this study, the sample data is accurate to within + 1.3 percentage points using a 95% confidence level. This credible interval will be wider among subsets of the surveyed population of interest.

All sample surveys and polls, whether or not they use probability sampling, are subject to other multiple sources of error which are most often not possible to quantify or estimate, including, but not limited to coverage error, error associated with nonresponse, error associated with question wording and response options, and post-survey weighting and adjustments.

**ONLINE SURVEY**

**8,022 ADULTS**

**8 COUNTRIES**



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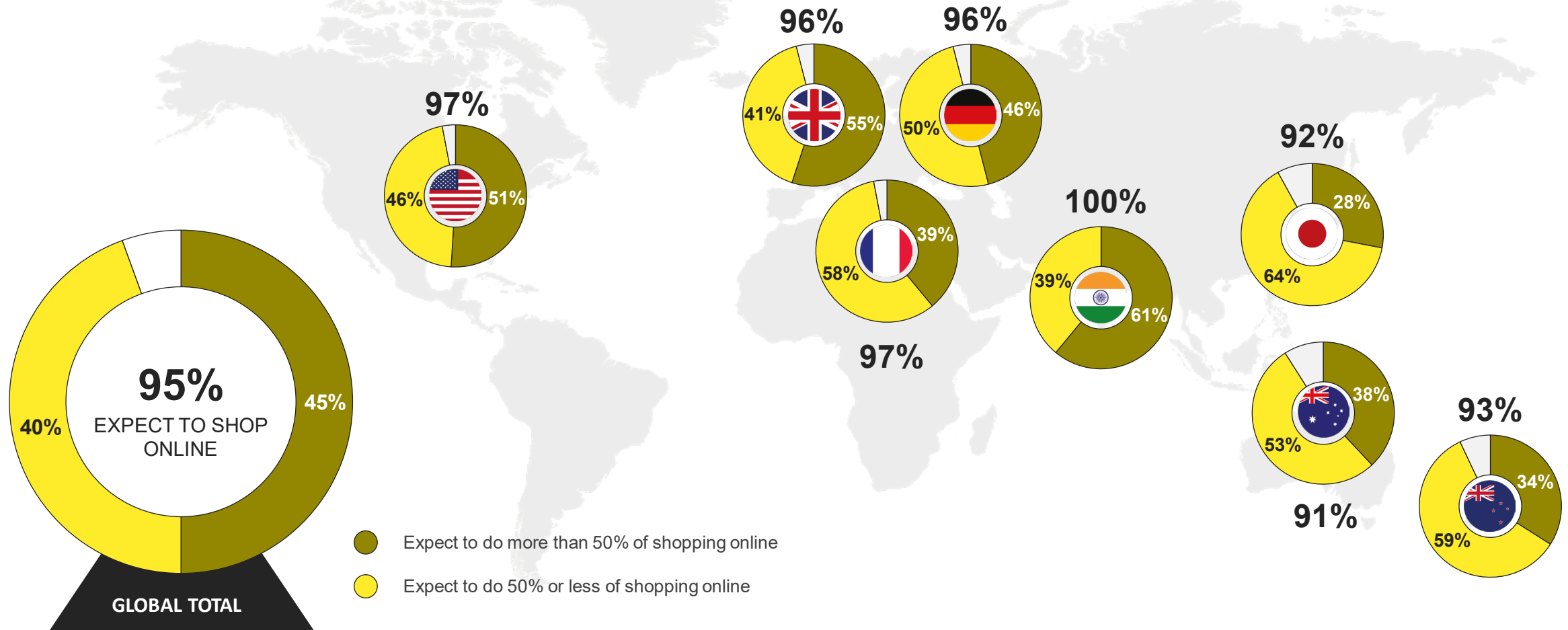
# Online Holiday Shopping

This year, consumers expect to do the majority of their holiday shopping online, and for the most popular gifts to be technology-based. This continued reliance on technology and online transactions may create confusion and some concerns about cybersecurity this holiday season.

# Nearly All Consumers Who Are Planning to Shop During the 2022 Holiday Season Expect to Do So Online

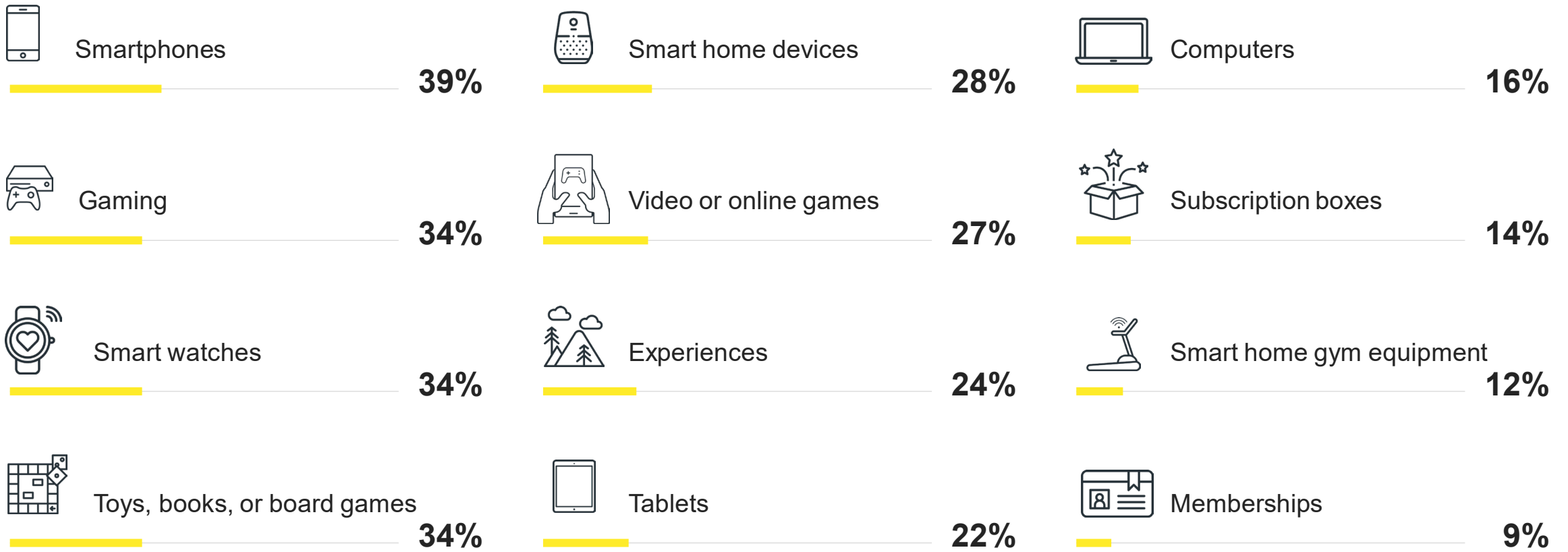
## Online Shopping Expectations For 2022 Holiday Season

Among those planning to shop during the 2022 holiday season



# Consumers Expect That the Most Sought-After Gifts This Holiday Season Will Be Technology Gifts

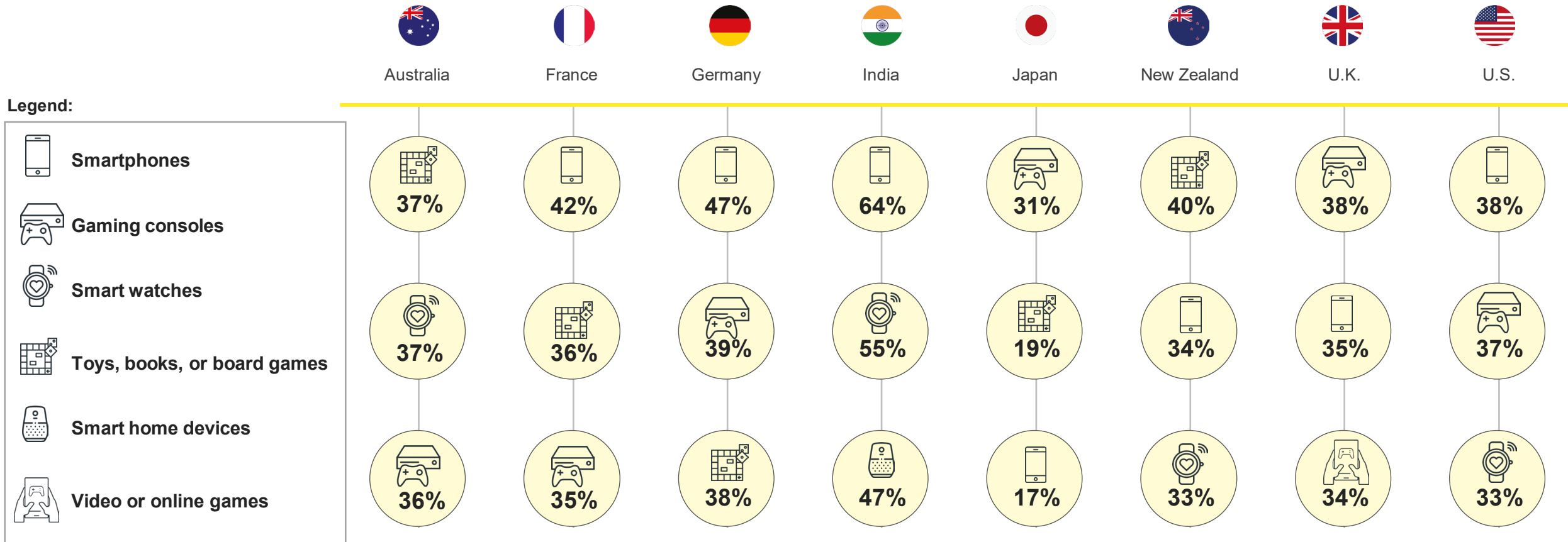
Most Sought After Gifts This Holiday Season  
(Global Total)



2% Other, 17% Not sure

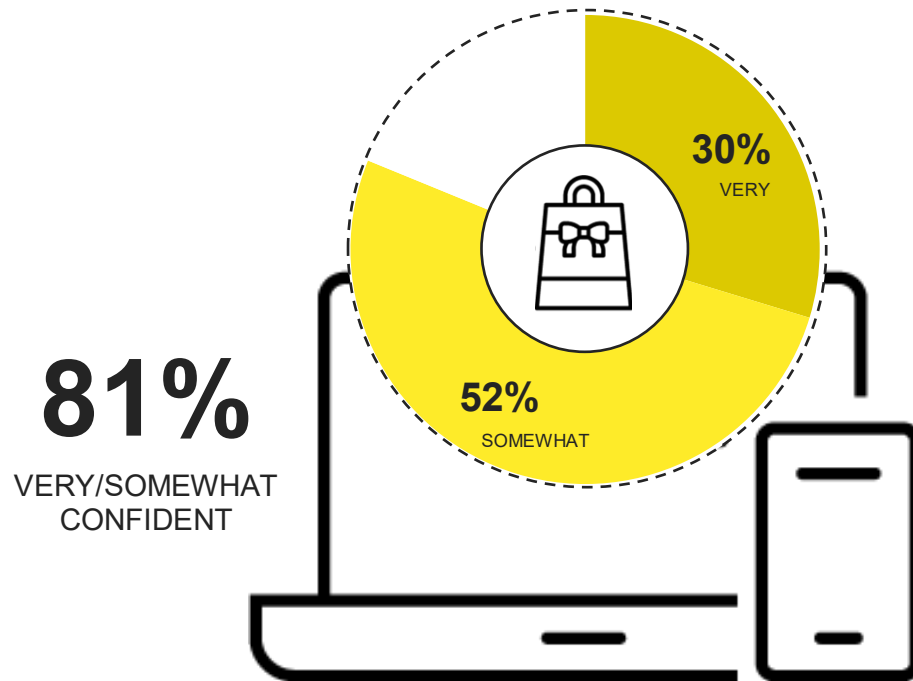
# Smartphones Are Predicted to Be the Most Sought-After Gifts This Holiday Season in Most Countries, Though Less So in Japan

Most Sought After Gifts This Holiday Season  
(Top 3 By Country)

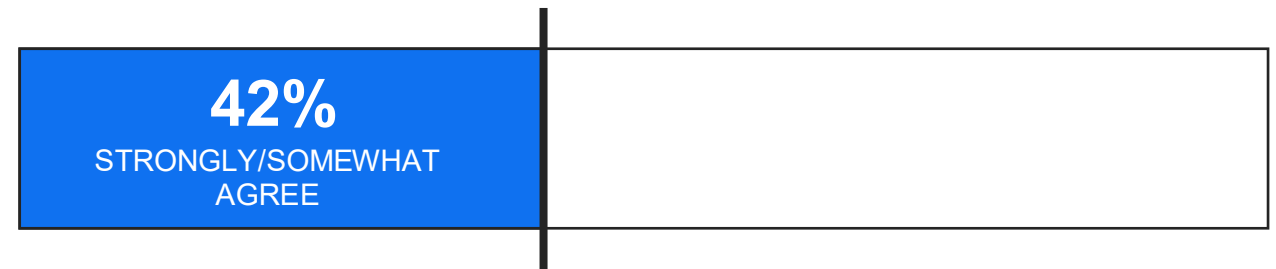


# While Most Consumers Say They Are Confident That They Can Shop Safely Online This Holiday Season, Less Than a Third Feel *Very* Confident

Confidence In Shopping Safely Online This Holiday Season  
(Global Total)



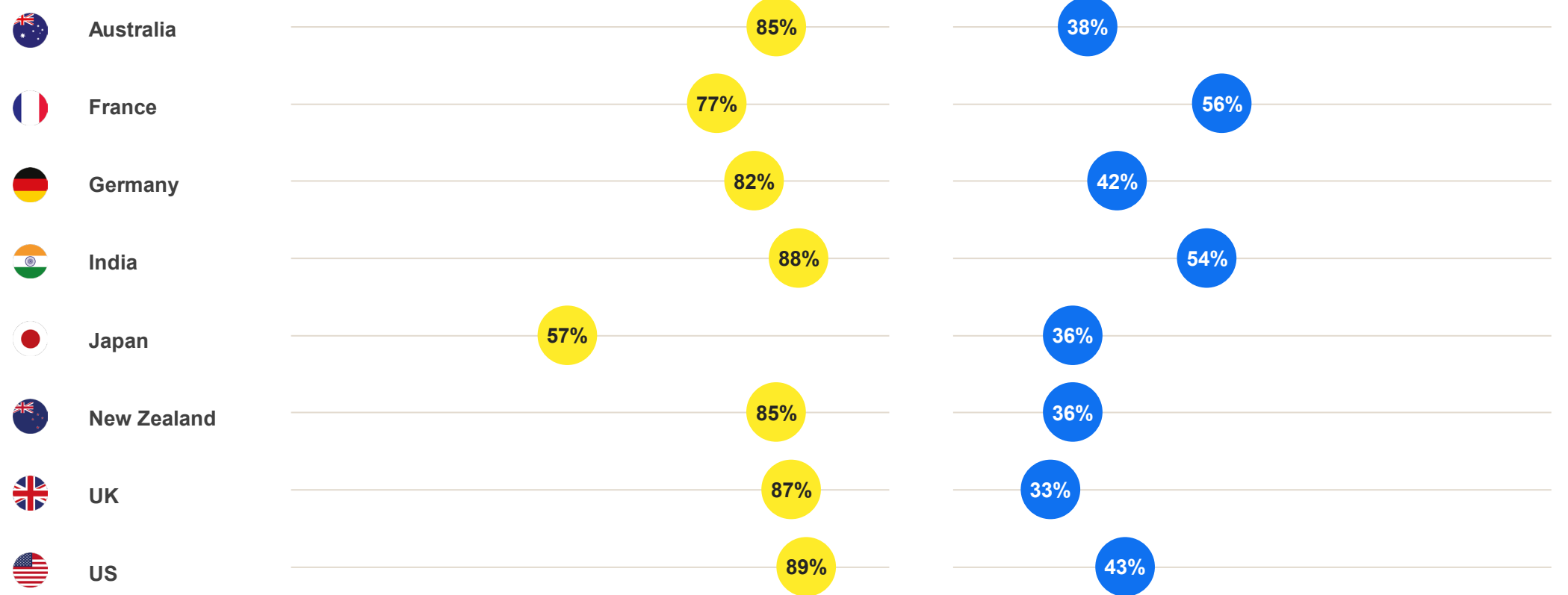
“I am not really sure of the best ways to shop safely online this holiday season”





# Despite Confidence, Many Are Unsure of the Best Ways to Shop Online This Holiday Season, Particularly in France and India

## Confidence In Shopping Safely Online This Holiday Season (By Country)



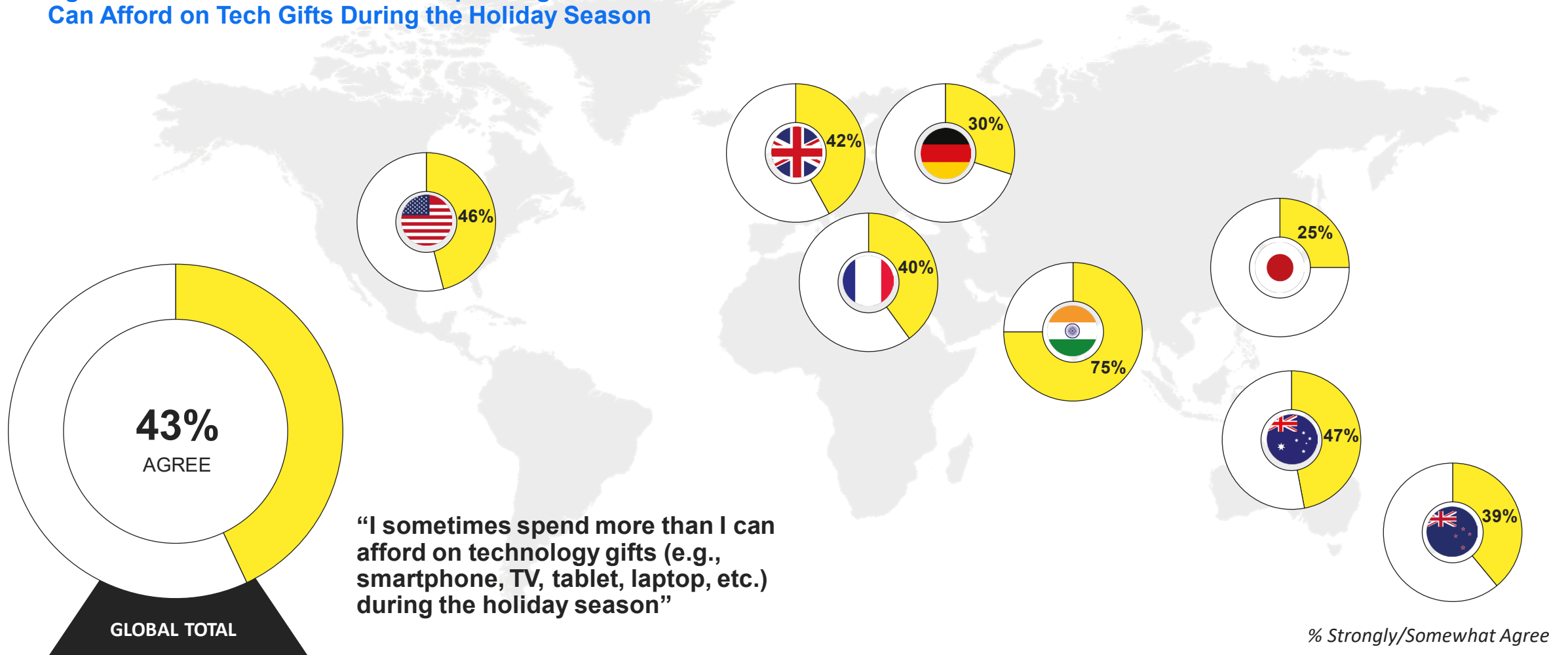


# RECESSION IMPACT

Concerned about the steadily increasing cost of living and inflation, many consumers plan to buy fewer technology gifts this holiday season compared to years past. Others plan to take cost cutting measures, including clicking on questionable links, which may put them at risk.

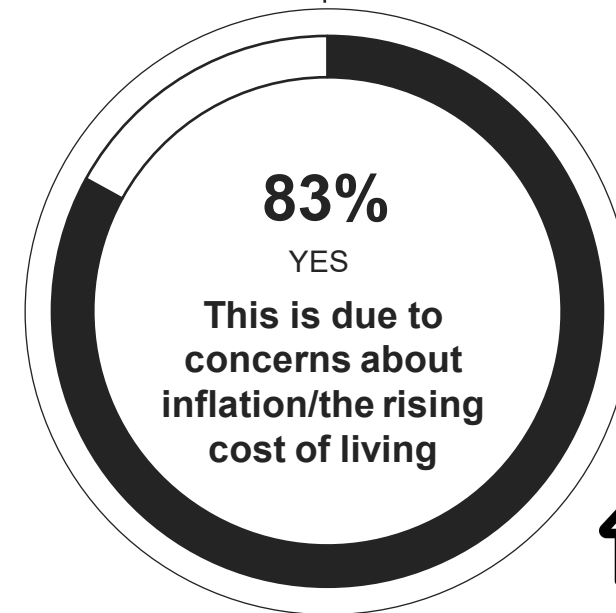
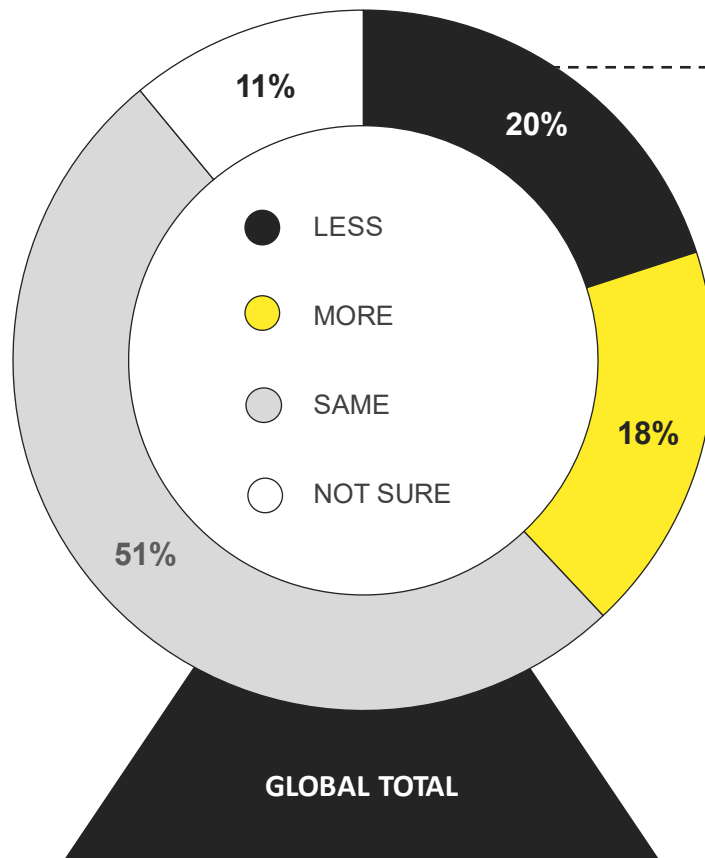
# 2 in 5 Consumers Say That They Sometimes Spend More Than They Can Afford on Technology Gifts During the Holiday Season

Agreement with Statement About Spending More Than Can Afford on Tech Gifts During the Holiday Season

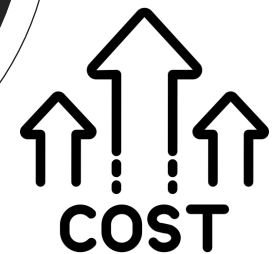


# Compared to Previous Years, 1 in 5 Adults Expect to Buy Fewer Tech Gifts This Holiday Season, Largely Due to the Rising Cost of Living

Expect To Buy More/Less/Same Amount Of Technology Gifts This Holiday Season  
(Global Total)

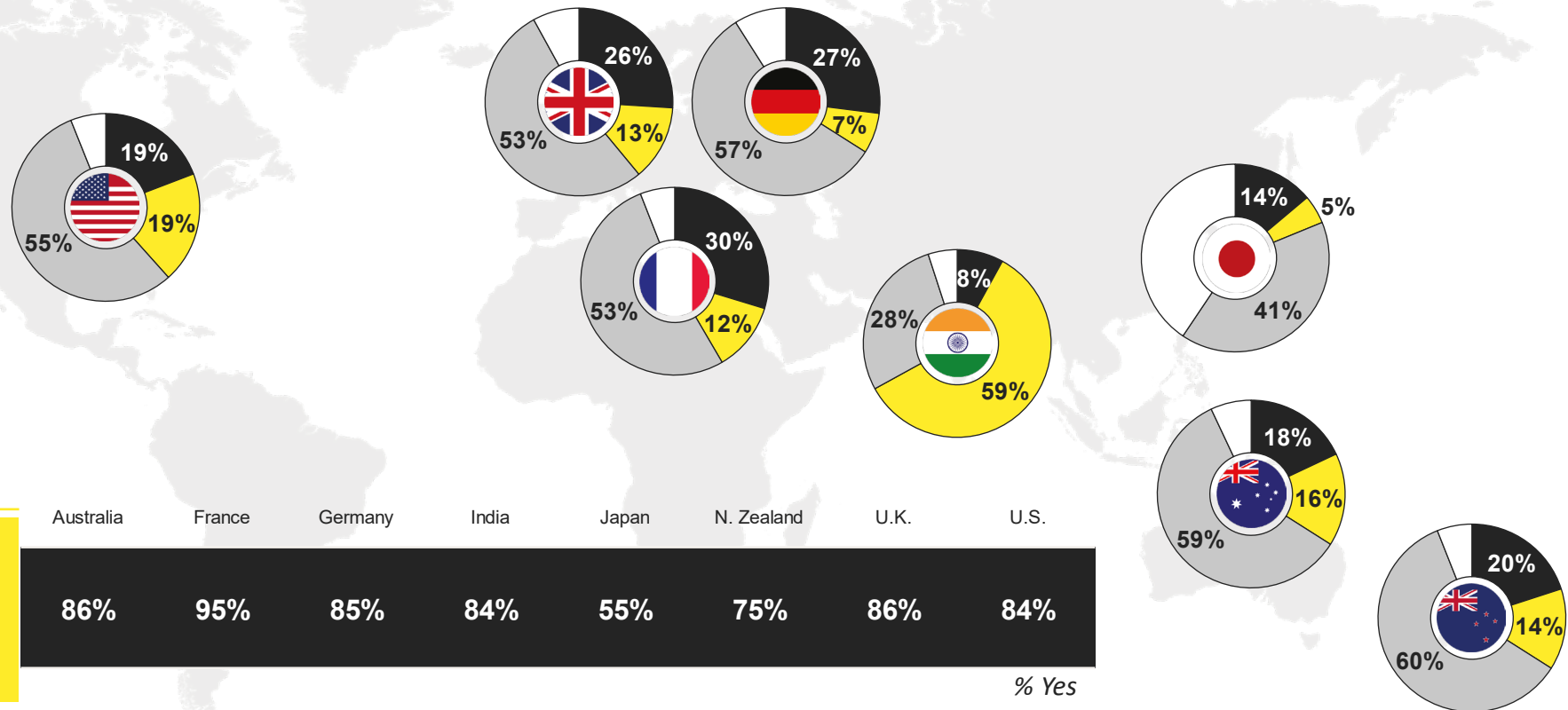


Among those who plan to buy less technology gifts this holiday season



# French Consumers Most Likely to Express Concern about Rising Cost of Living as They Consider Holiday Spending on Tech Gifts

Expect To Buy More/Less/Same Amount Of Technology Gifts This Holiday Season  
(By Country)

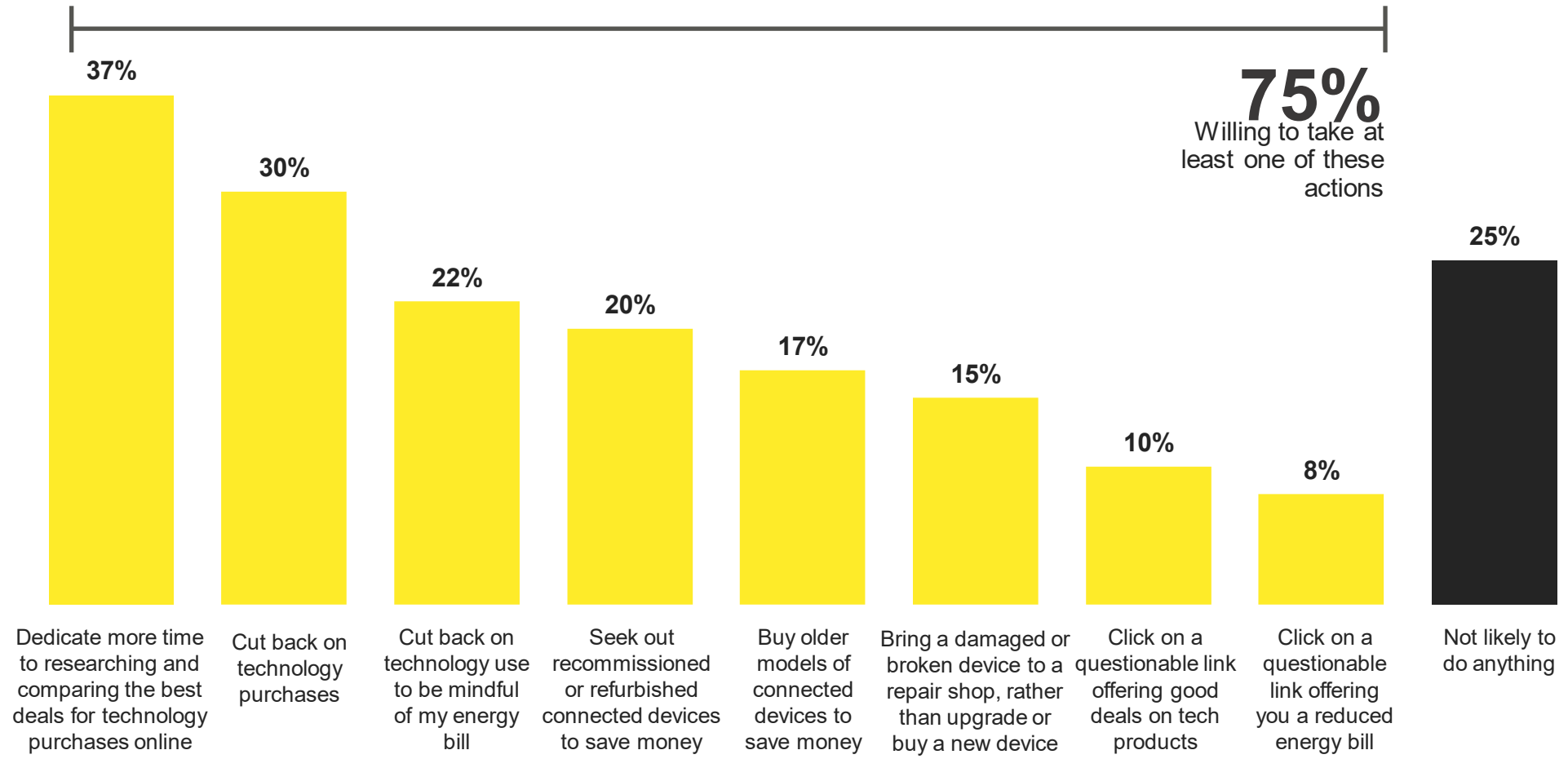


Expect to buy less due to concerns about inflation/the rising cost of living

Among those who plan to buy less technology gifts this holiday season

# The Majority of Consumers Would be Willing to Cut Costs in Some Way This Holiday Season Due to Inflation and Living Costs

Steps Willing To Take To Help Cut Costs Due To Inflation/The Rising Cost Of Living  
(Global Total)



	Willing to take at least one action	Clicked on a questionable link NET
Global Total	75%	15%
Australia	74%	13%
France	82%	9%
Germany	74%	9%
India	91%	52%
Japan	47%	3%
New Zealand	77%	8%
UK	80%	13%
US	77%	15%



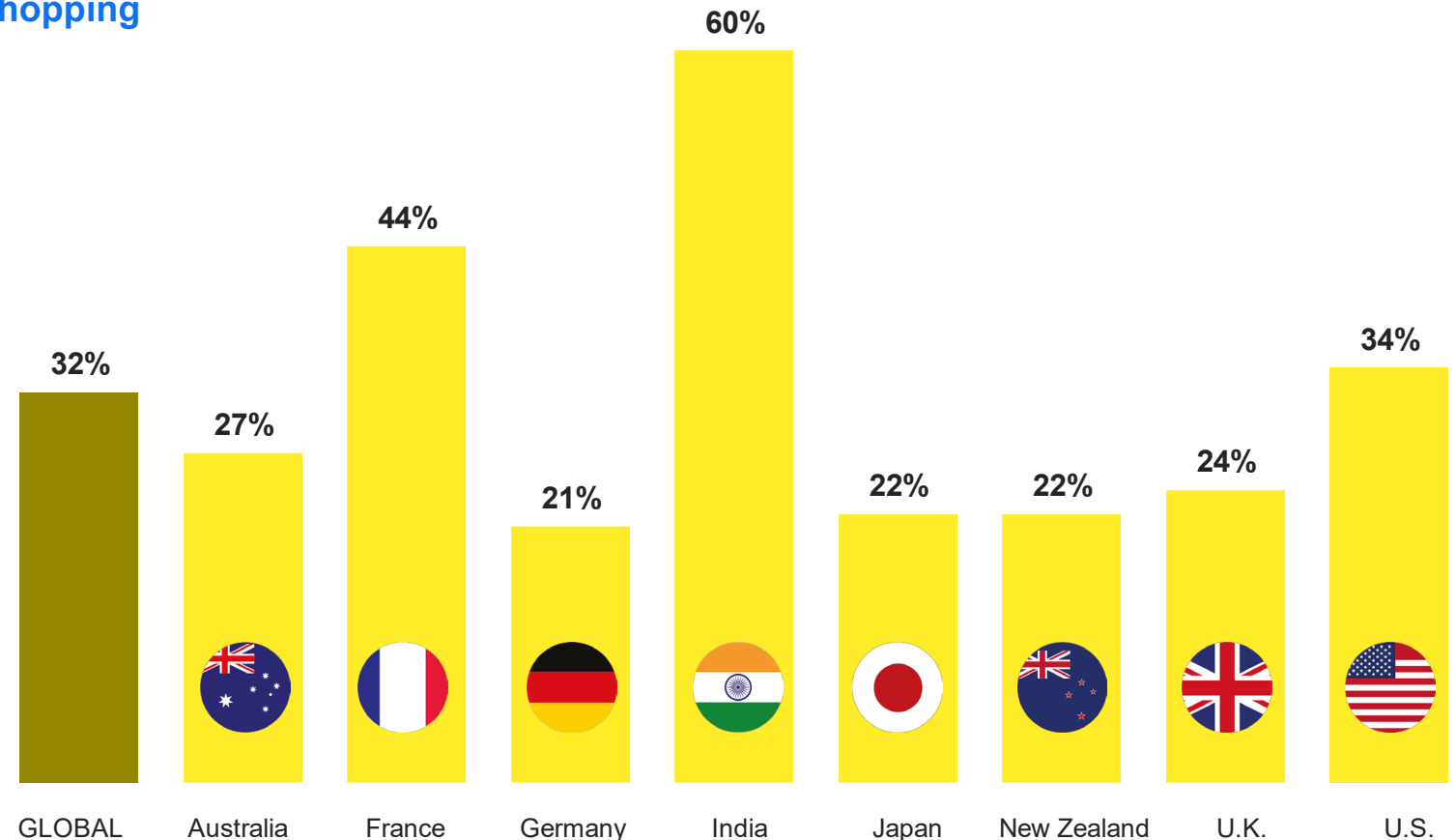
# RISK TOLERANCE

Adults may have a higher risk tolerance when shopping online during the holiday season – many are willing to risk their personal information as well as online or even physical safety for the sake of posting on social media or obtaining a high demand gift.

# Almost 1 in 3 Consumers Say That They Tend to Take More Risks When Online Shopping During the Holiday Season Than Other Times of the Year

Agreement with Statement About Online Shopping Risk Taking During the Holiday Season

**“I tend to take more risks (e.g., buy from an unknown seller, click on online ads, etc.) when online shopping during the holiday season than other times of the year”**

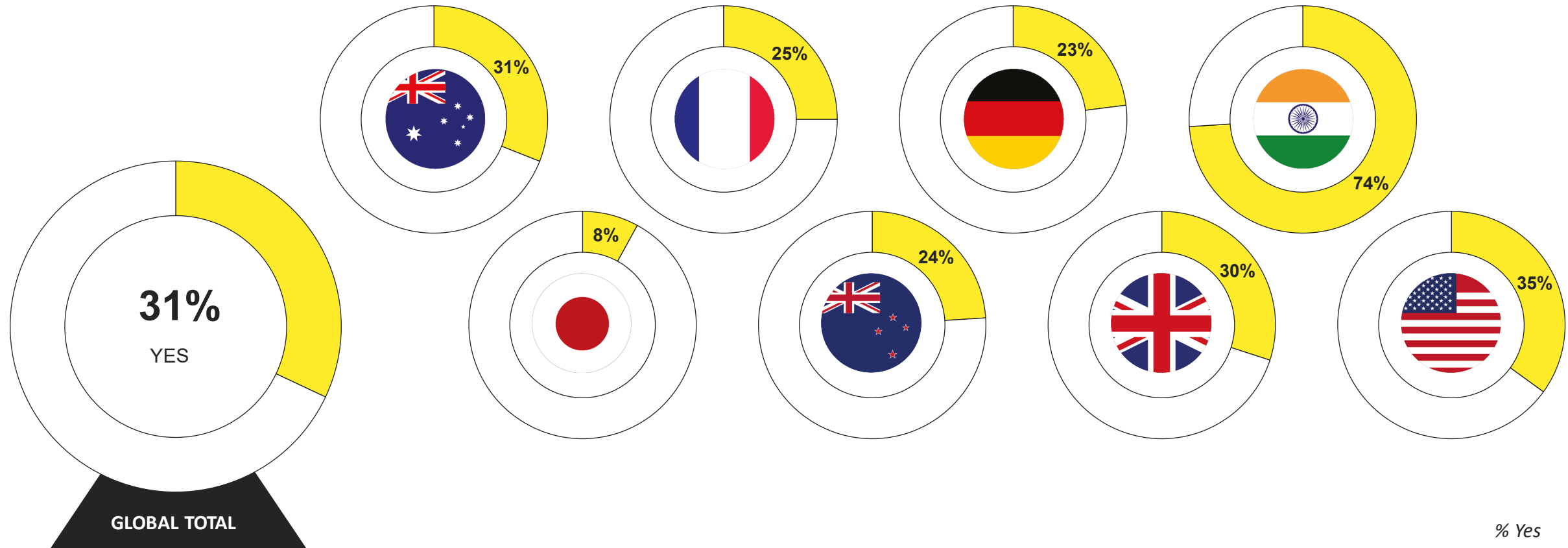


% Strongly/Somewhat Agree



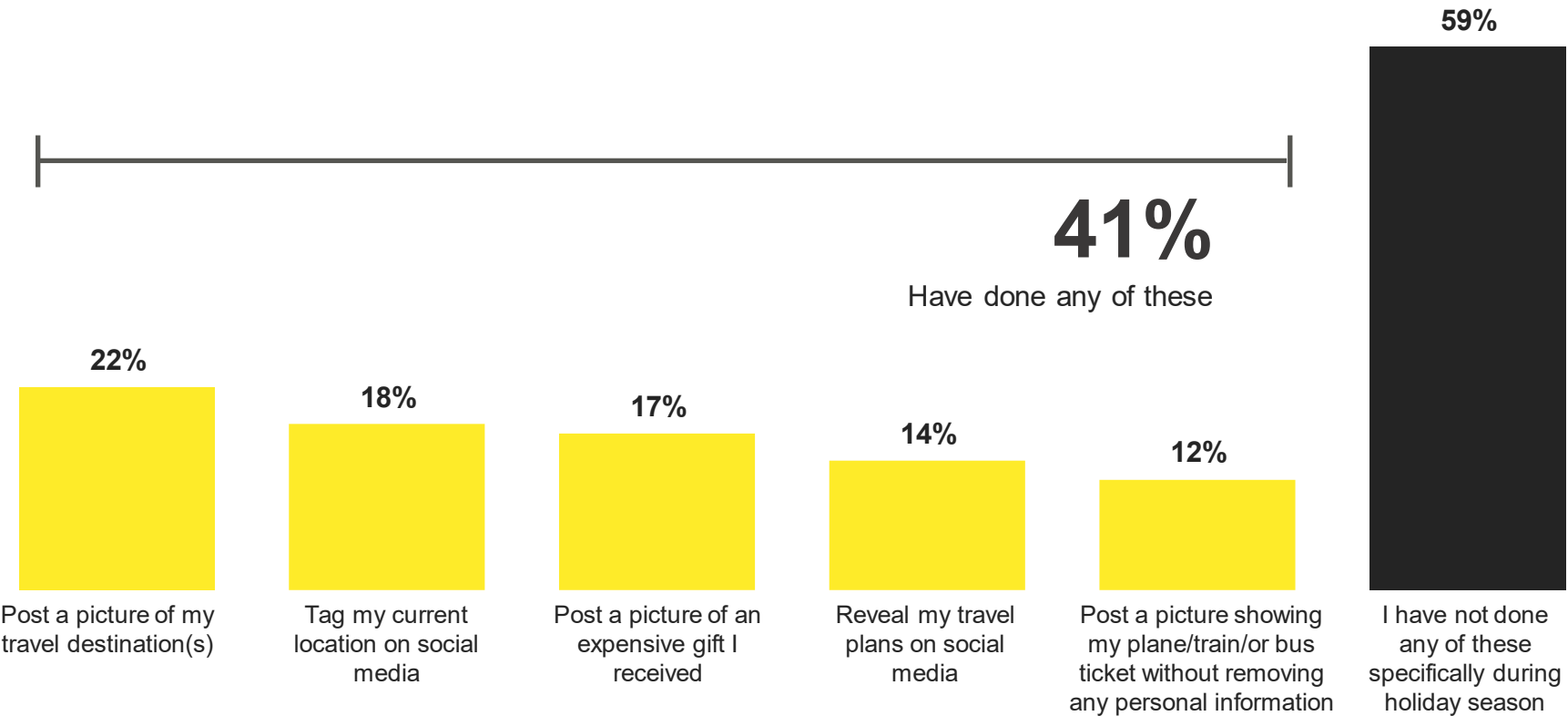
# Nearly a Third of Adults Say That They Have Made a Holiday Season Purchase by Clicking on a Questionable Ad on Social Media

Made A Holiday Season Purchase By Clicking On A Questionable Ad On Social Media











# 2 in 5 Admit to Risking Their Personal Information or Privacy During the Holiday Season – Typically, by Posting a Picture of Their Travel Destination or Tagging Their Location on Social Media

Actions Taken Specifically During The Holiday Season  
(Global Total)

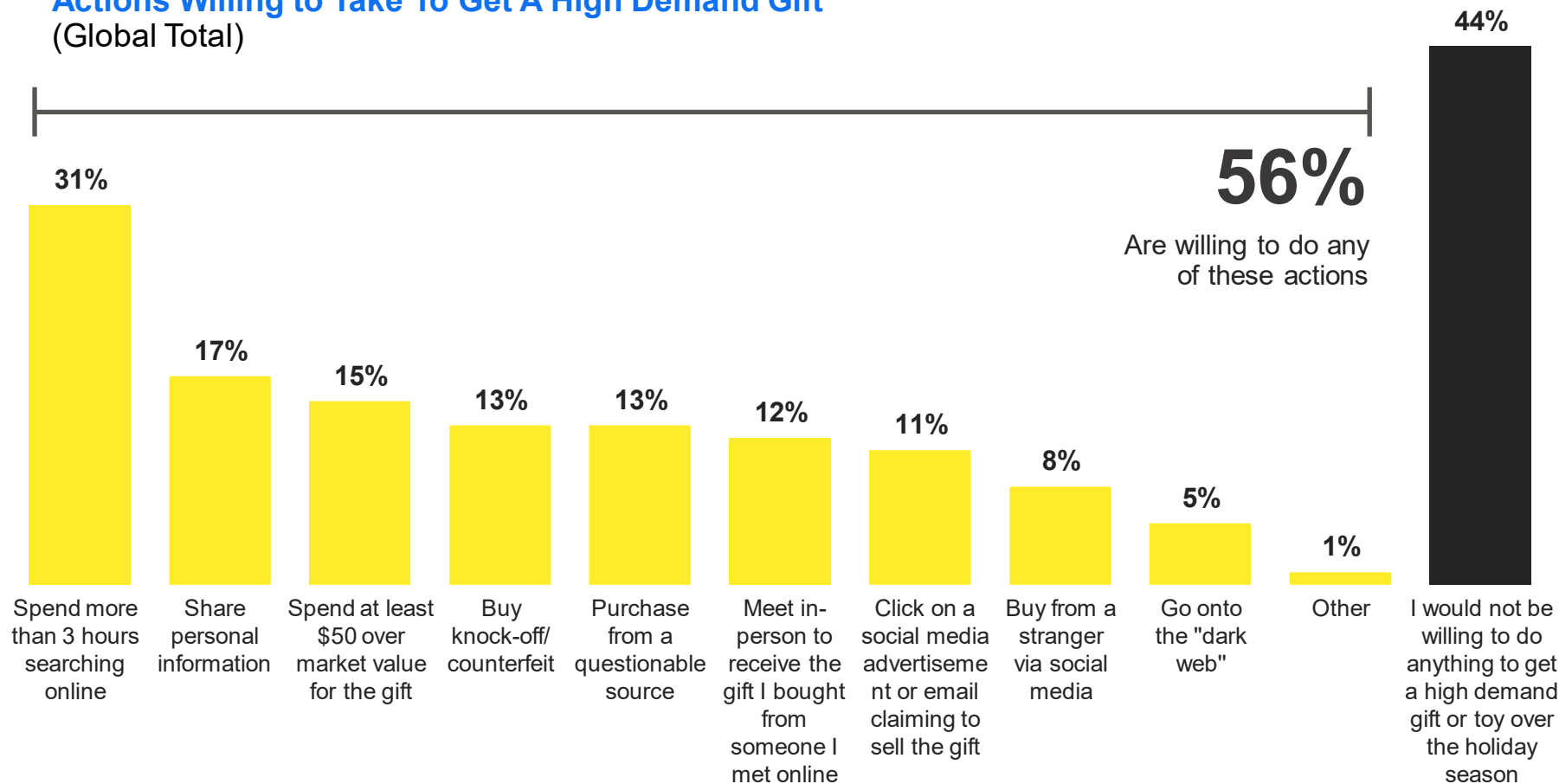


Have Done Any Of These Actions

	Australia	42%
	France	41%
	Germany	28%
	India	85%
	Japan	16%
	New Zealand	38%
	UK	36%
	US	41%

# Over Half of Consumers Admit That They Are Willing to Go Above and Beyond to Get a High Demand Gift or Toy During the Holiday Season, Mainly by Spending Additional Time Searching for It

## Actions Willing to Take To Get A High Demand Gift (Global Total)



		Share Personal Information	Purchase from a questionable source
	GLOBAL	17%	13%
	Australia	17%	12%
	France	17%	9%
	Germany	15%	7%
	India	42%	38%
	Japan	5%	1%
	New Zealand	13%	7%
	UK	14%	14%
	US	17%	14%



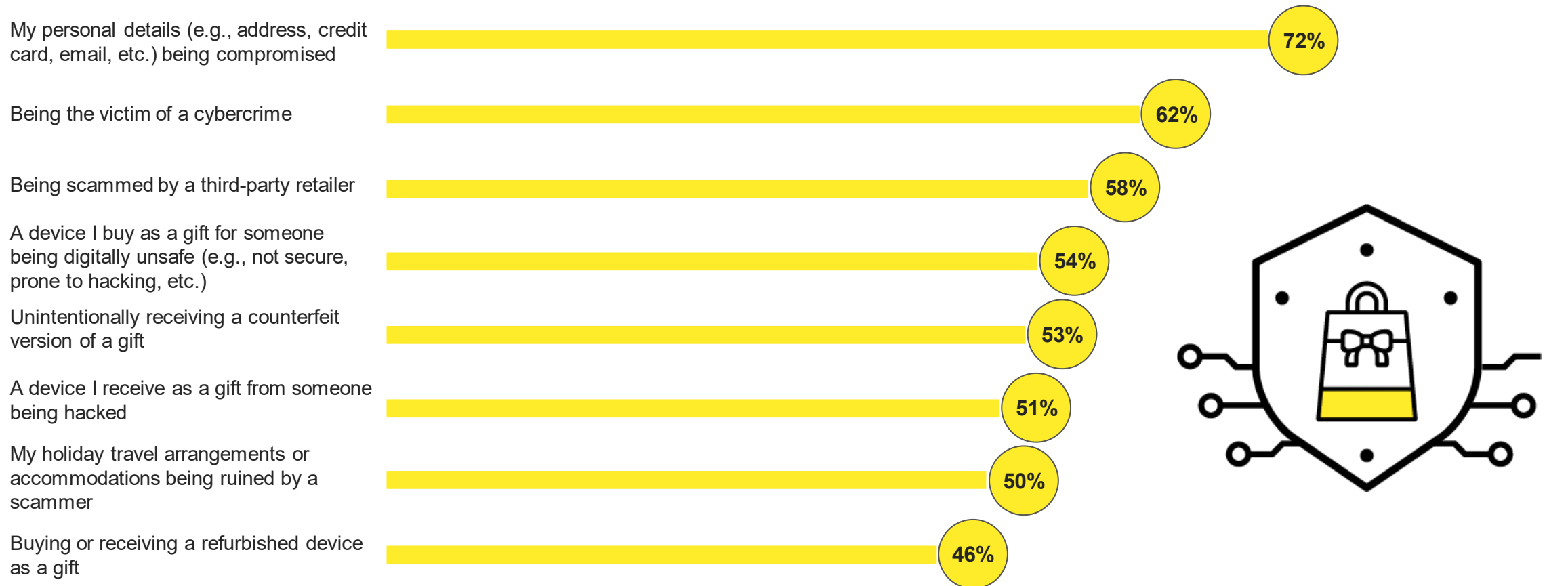
# CYBERSECURITY CONCERNS

Consumers express cybersecurity concerns when shopping online during the holidays, likely because many have, at some point, fallen victim to a scam when shopping online during the holidays - a slip up that has cost victims hundreds of dollars, on average.



# At Least Half of Consumers Are Concerned About Security When Shopping Online During the Holiday Season

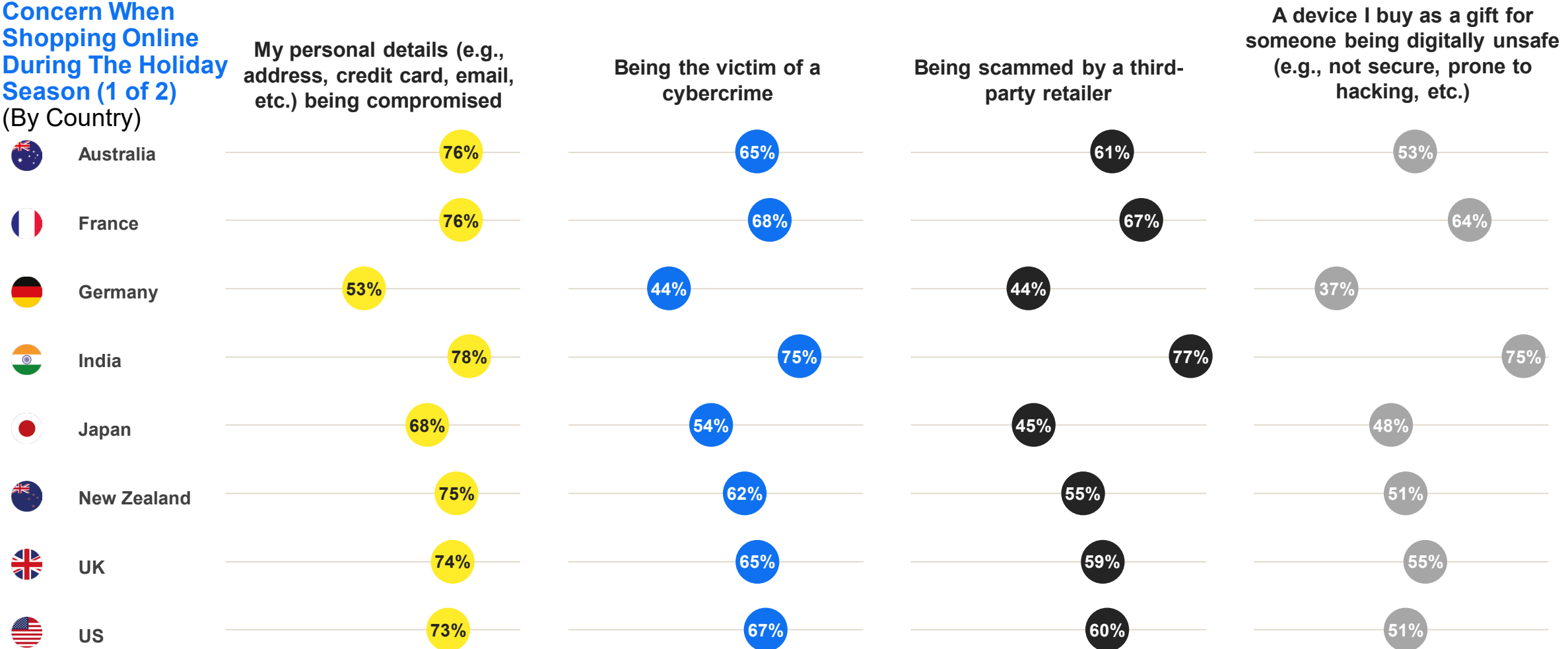
## Concern About Each When Shopping Online During The Holiday Season (Global Total)



% Very/Somewhat Concerned

# Security Concerns Around Holiday Shopping Appear Particularly High in India and France and Consistently Lower in Germany

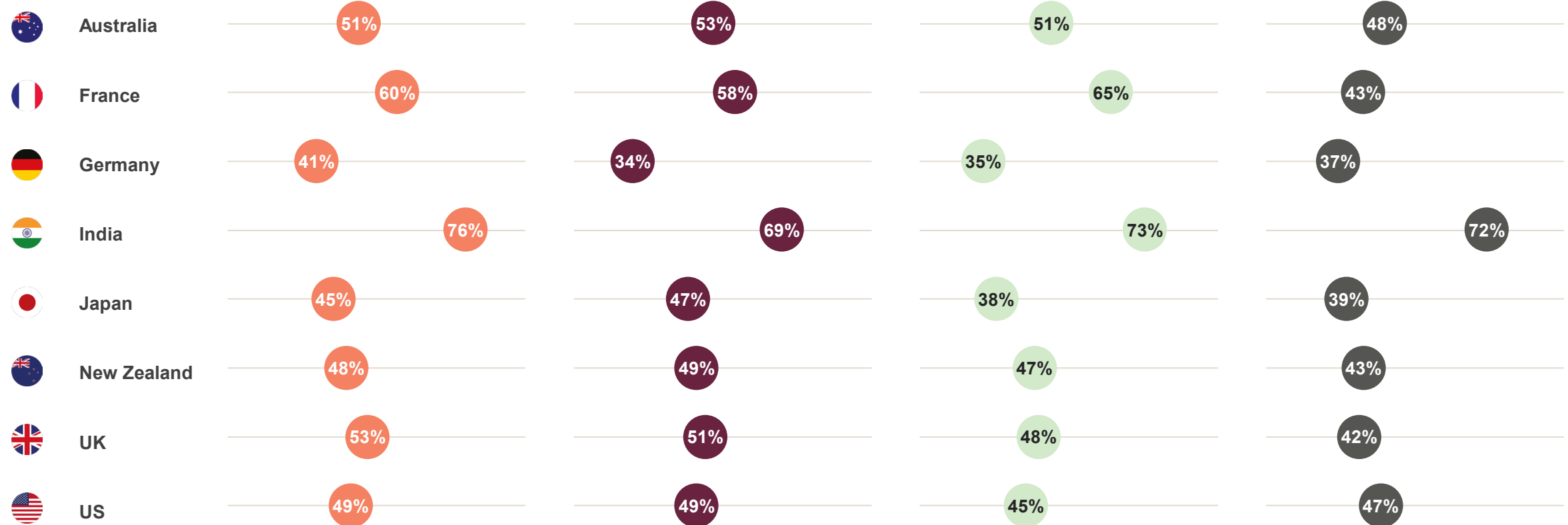
Concern When Shopping Online During The Holiday Season (1 of 2)  
(By Country)



% Very/Somewhat Concerned

# Security Concerns Around Holiday Shopping Appear Particularly High in India and France and Consistently Lower in Germany

## Concern When Shopping Online During The Holiday Season (2 of 2) (By Country)



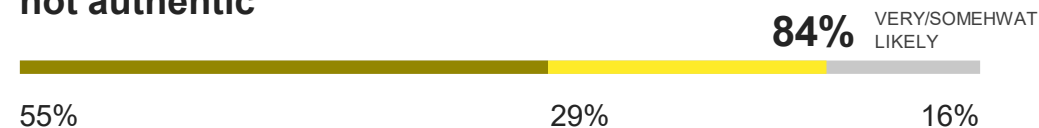
% Very/Somewhat Concerned

# Most Consumers are Likely to Take Various Actions to Protect Themselves Against Cybercrime When Shopping Online During the Holiday Season

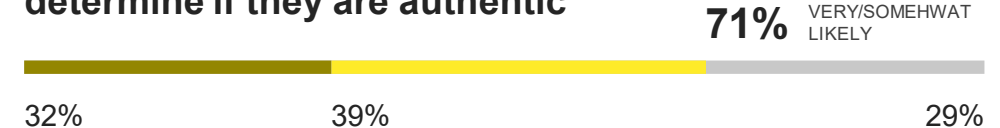
## Likelihood To Take Action To Help Protect Against Potential Cybercrimes (Global Total)

● VERY LIKELY ● SOMEWHAT LIKELY ● NOT AT ALL/NOT VERY LIKELY

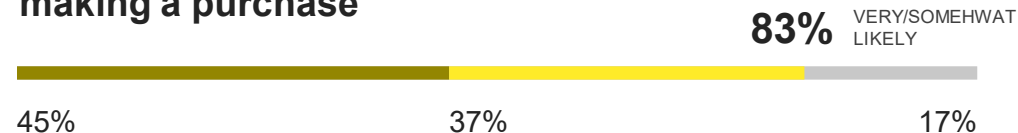
Abandon a purchase after noticing the website is not authentic



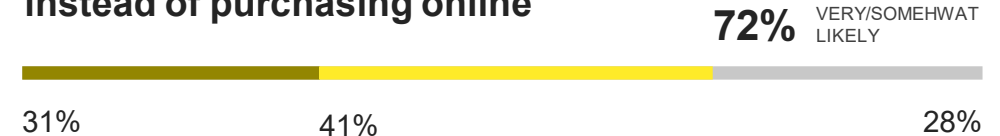
Check a retailer's social media presence to determine if they are authentic



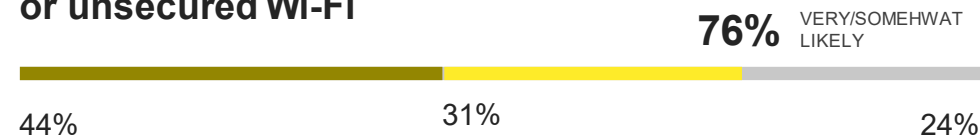
Look at the ratings for an online seller before making a purchase



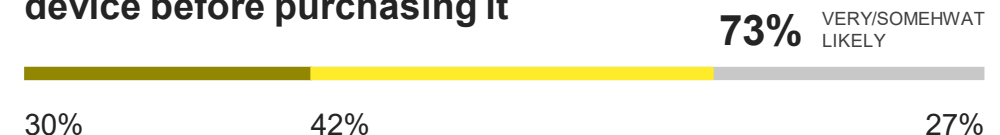
Make the final purchase at a physical store instead of purchasing online



Not making online purchases when using public or unsecured Wi-Fi



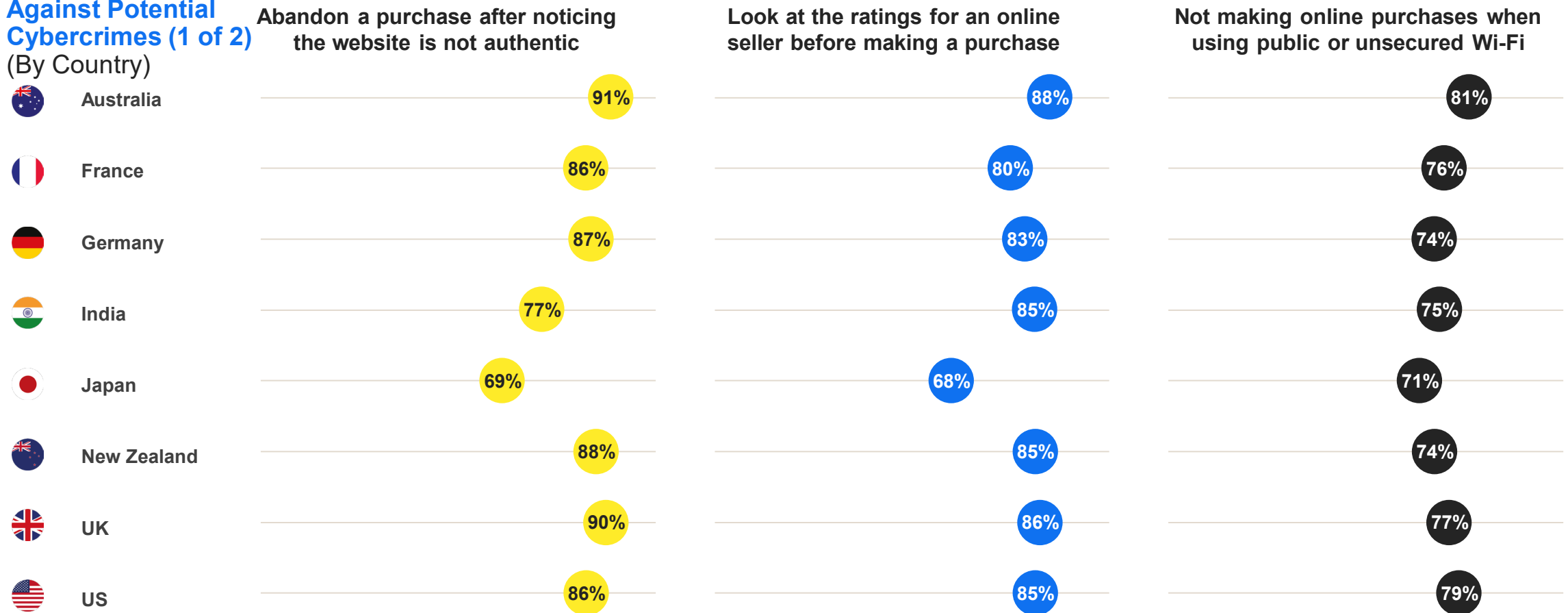
Check the digital security or safety record of a device before purchasing it





# Those in Japan Are the Least Likely to Abandon a Purchase on an Unauthentic Website or Look at Ratings Before Purchasing to Protect Against Potential Cybercrimes

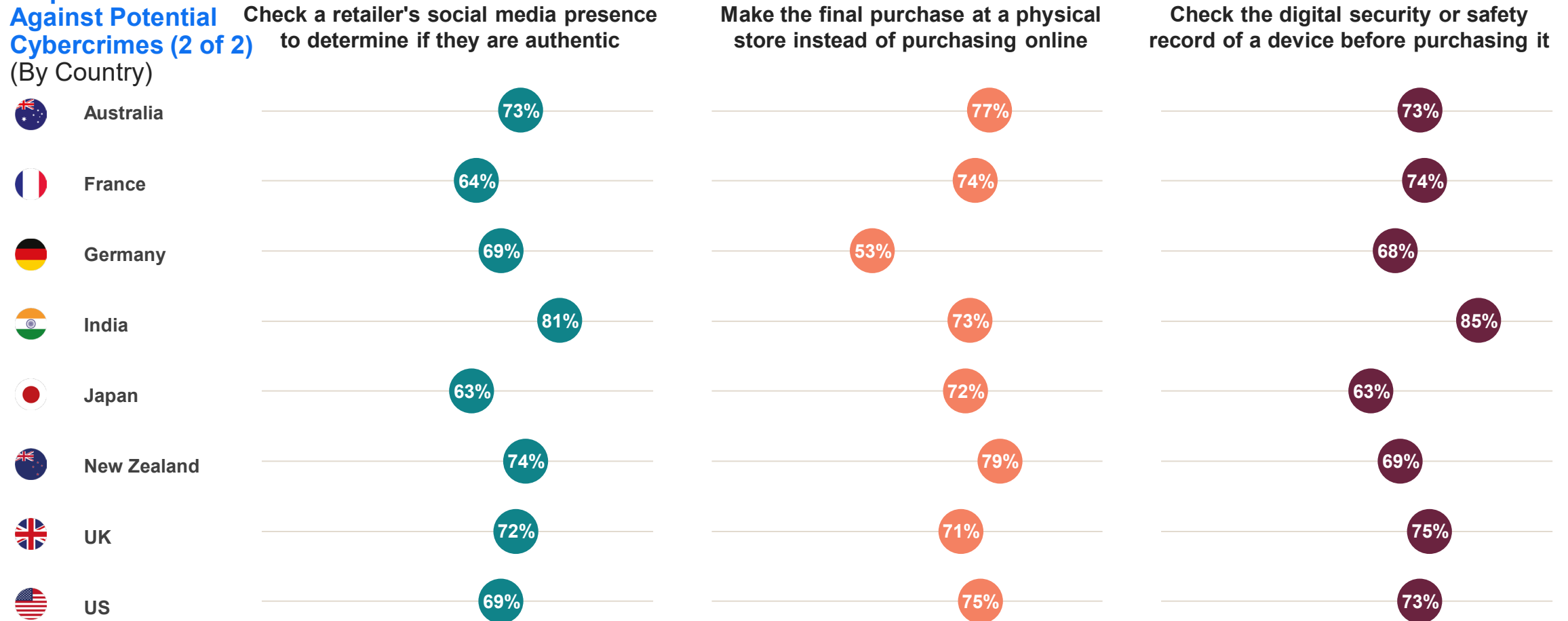
Likelihood To Do To  
Help Protect  
Against Potential  
Cybercrimes (1 of 2)  
(By Country)



% Very/Somewhat Likely

# Adults in Germany are the Least Likely To Make a Final Purchase at a Physical Store Instead of Online to Protect Against Potential Cybercrimes

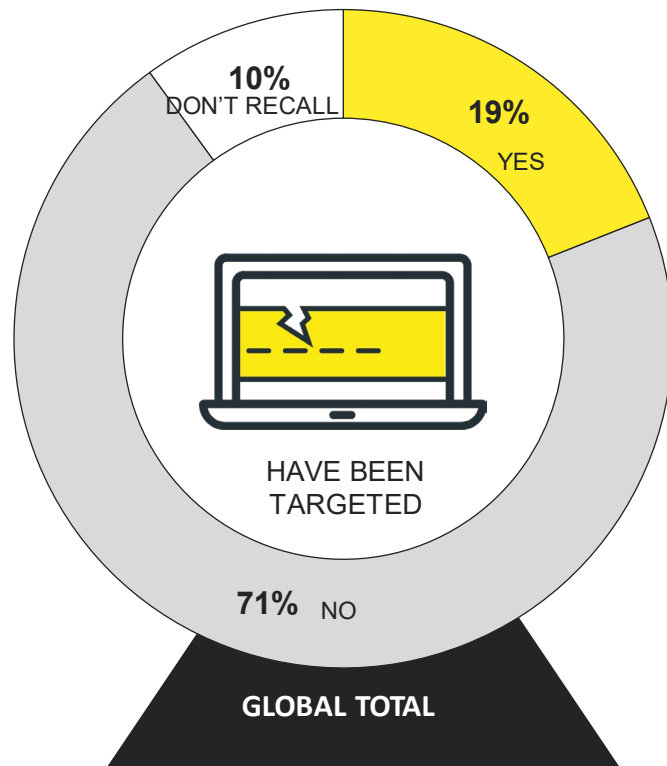
## Likelihood To Do To Help Protect Against Potential Cybercrimes (2 of 2) (By Country)



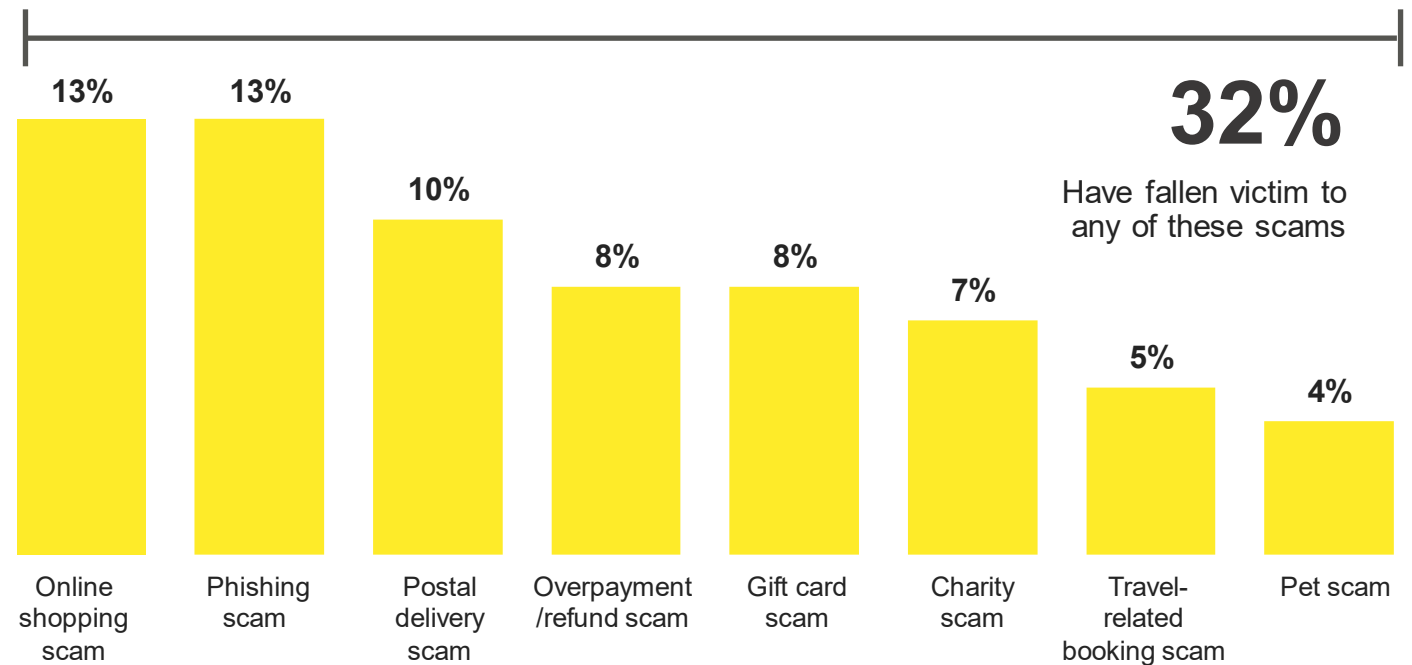
% Very/Somewhat Likely

# These Security Concerns Are Rooted in Experience for Some – Nearly 1 in 3 Report That They Have Fallen Victim to a Scam When Shopping Online During the Holiday Season

Have Been Targeted By A Scam When Shopping Online For The Holidays  
(Global Total)

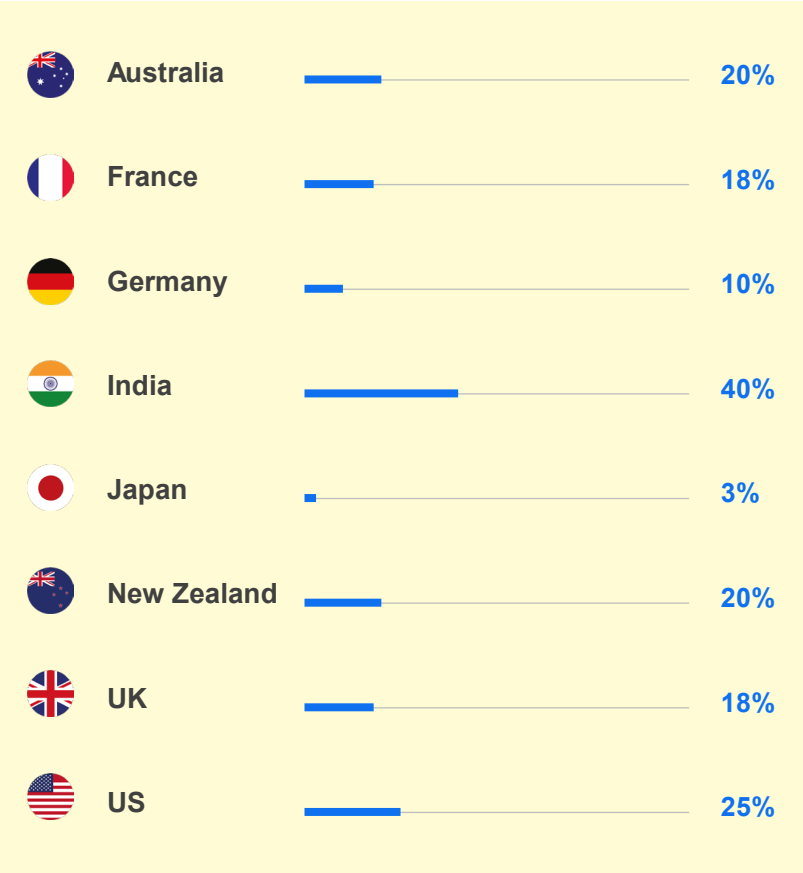


Scams Fallen Victim To  
(Global Total)

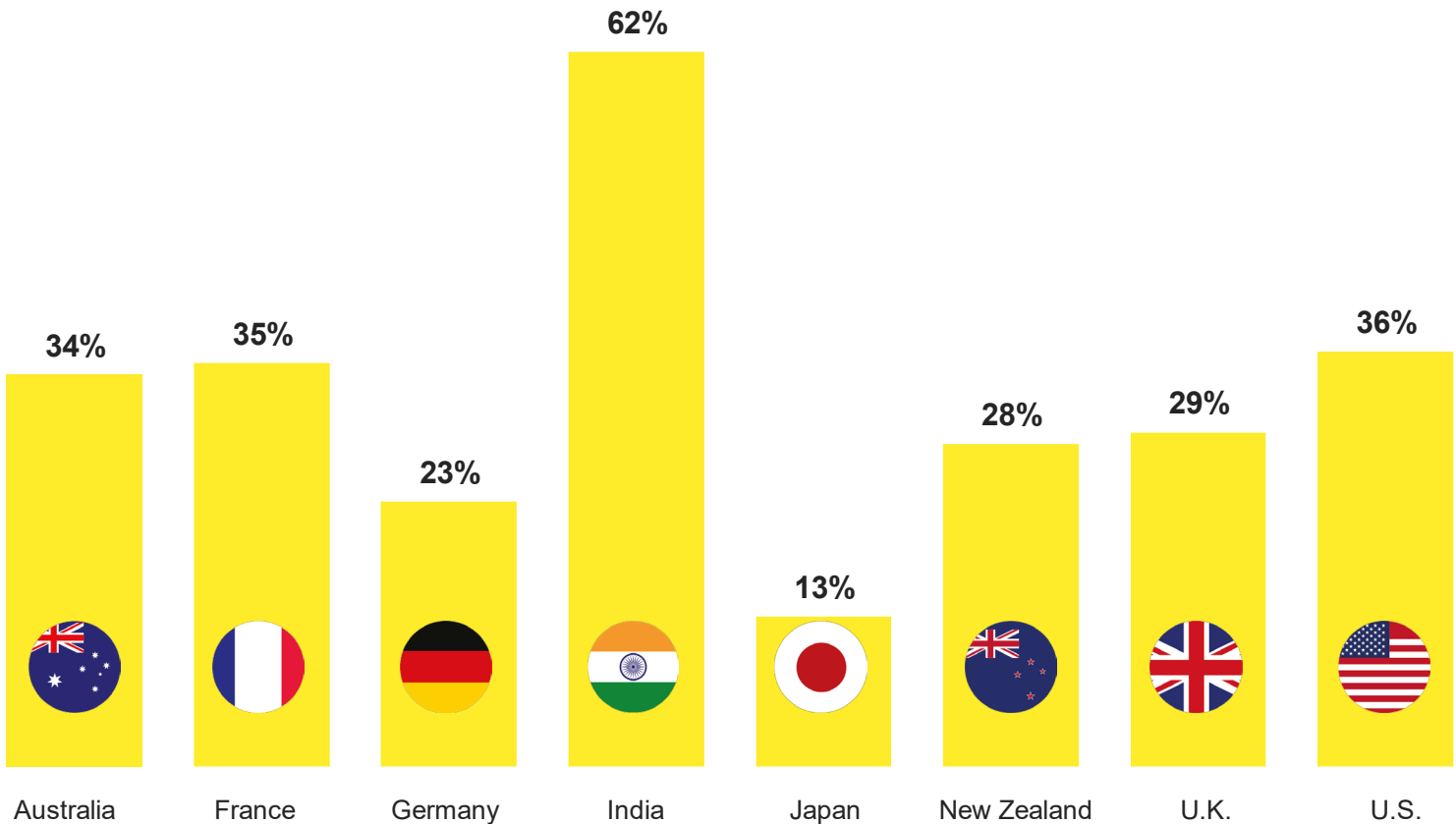


# Consumers in Japan Are the Least Likely to Report That They Have Fallen Victim to an online Scam During the Holiday Season

Have Been Targeted By A Scam When Shopping Online For The Holidays  
(By Country)



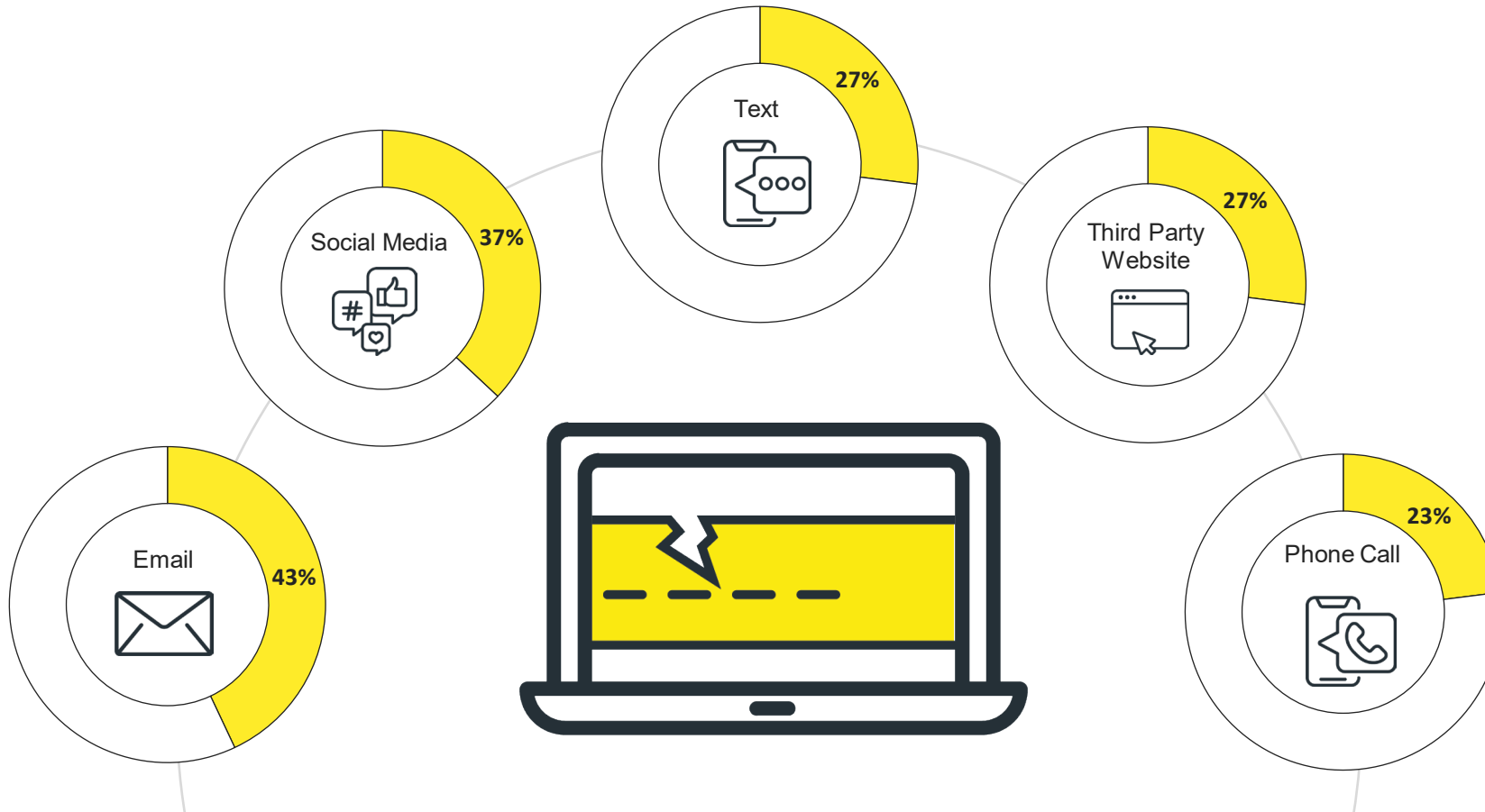
Fallen Victim To Any Scam  
(By Country)



# Globally, Holiday Season Scam Victims Say That the Scam(s) Primarily Occurred via Email or on Social Media

## Method Of Scam

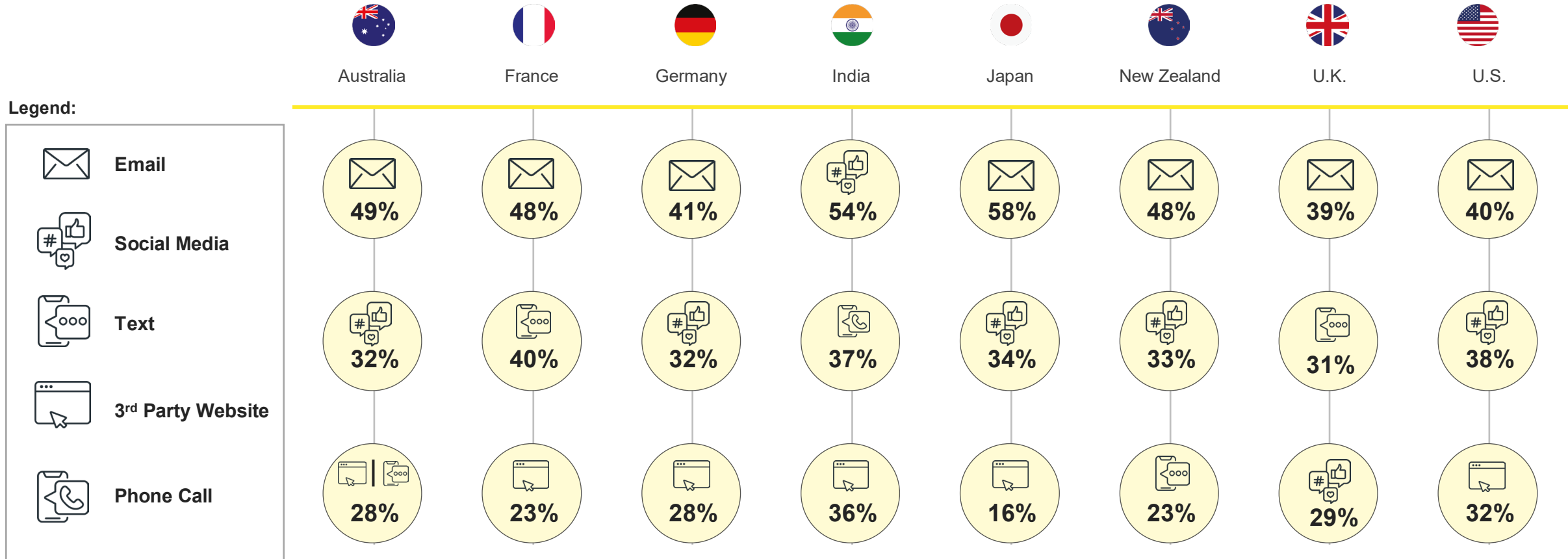
Among those who fell victim to a scam during the holiday season  
(Global Total)



# Most Common Locations of Online Scams Vary by Country









## Method Of Scam

Among those who fell victim to a scam during the holiday season  
(Top 3 By Country)



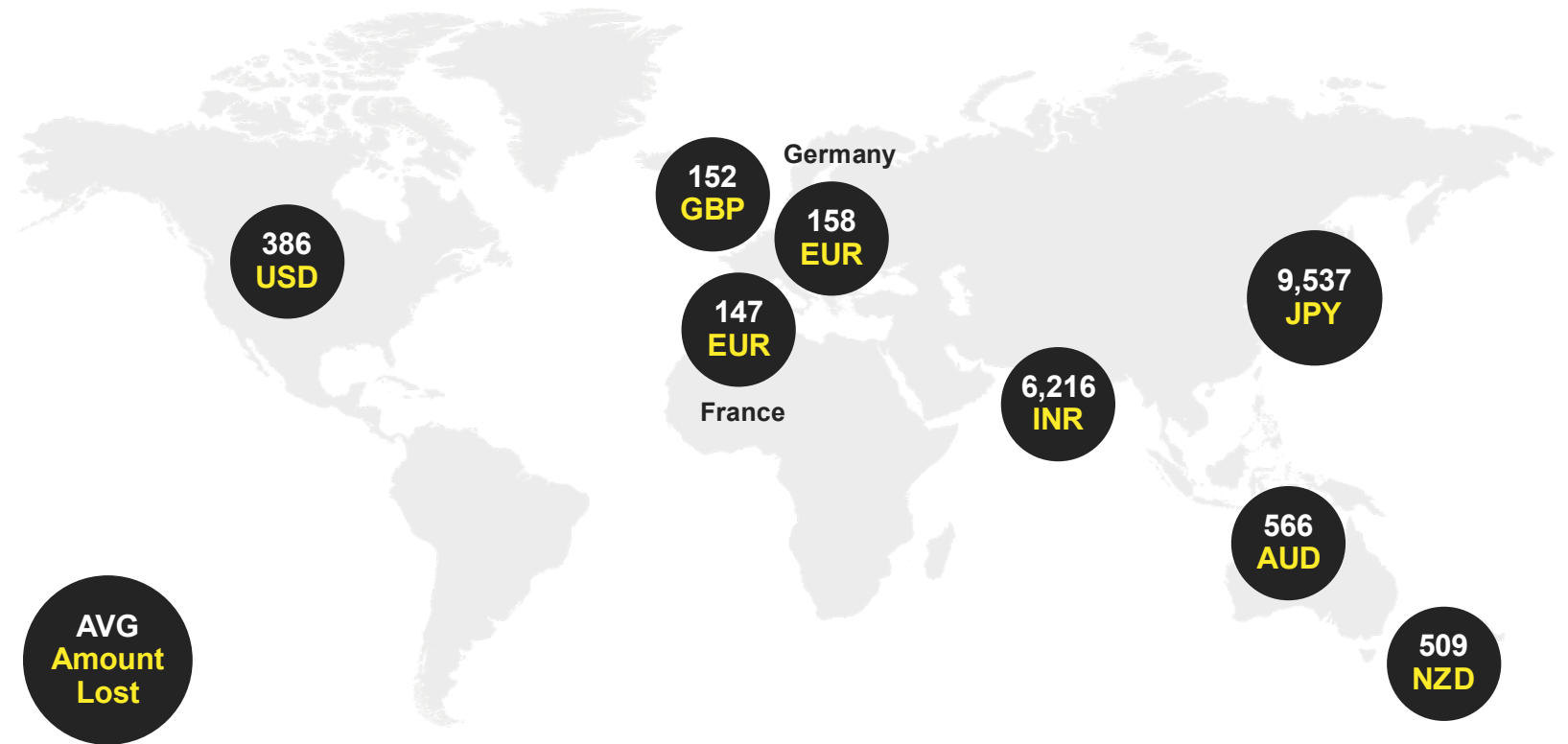
# These Holiday Season Scams Have Had Significant Financial Repercussions for Victims

## Proportion Who've Lost Money

	GLOBAL	83%
	Australia	78%
	France	84%
	Germany	87%
	India	95%
	Japan	52%
	New Zealand	76%
	UK	80%
	US	86%

## Average Amount Lost Due To A Holiday Season Scam

*Among those who fell victim to a scam during the holiday season*





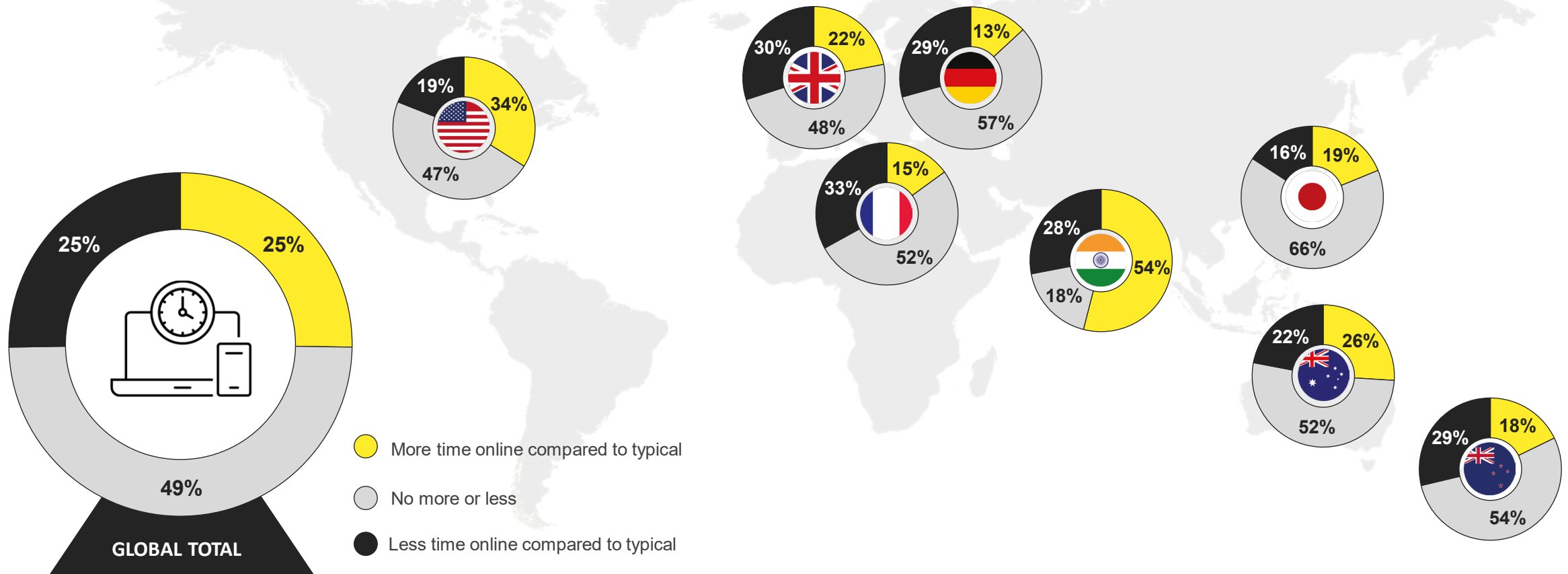
# CONNECTED ESCAPISM & MENTAL HEALTH

Most adults plan to take action to protect their mental health this holiday season, which for some includes modifications to their online behaviors. Still, spending time online offers an escape for many consumers during the holiday season. In fact, close to half say that spending time online has a positive impact on their mental health and their mental health would suffer if they couldn't access their connected devices.



# One in 4 Consumers Expect to Spend More Time Online During the Upcoming Holiday Season Compared to the Amount They Typically Do

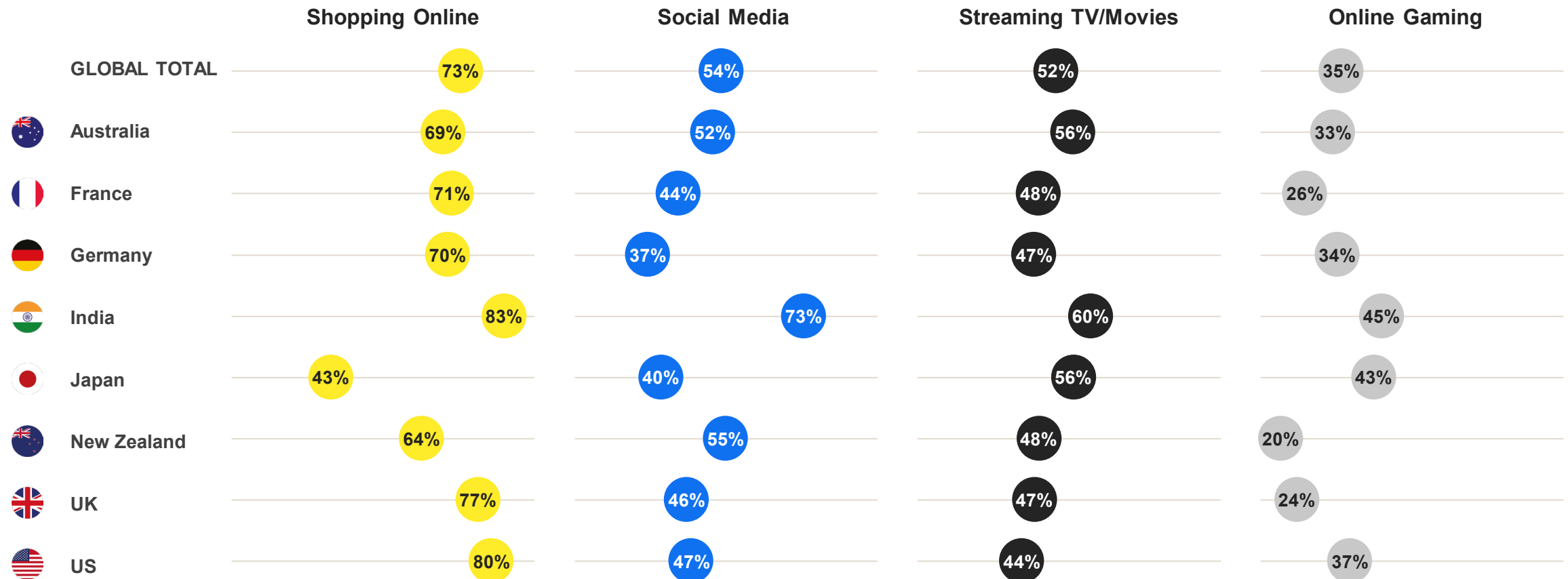
Expected Amount Of Time Will Spend Online During Upcoming Holiday Season



# Among Those That Expect to Spend More Time Online During the Holidays, Most Say That the Extra Time Will Be Spent Shopping Online – Except in Japan

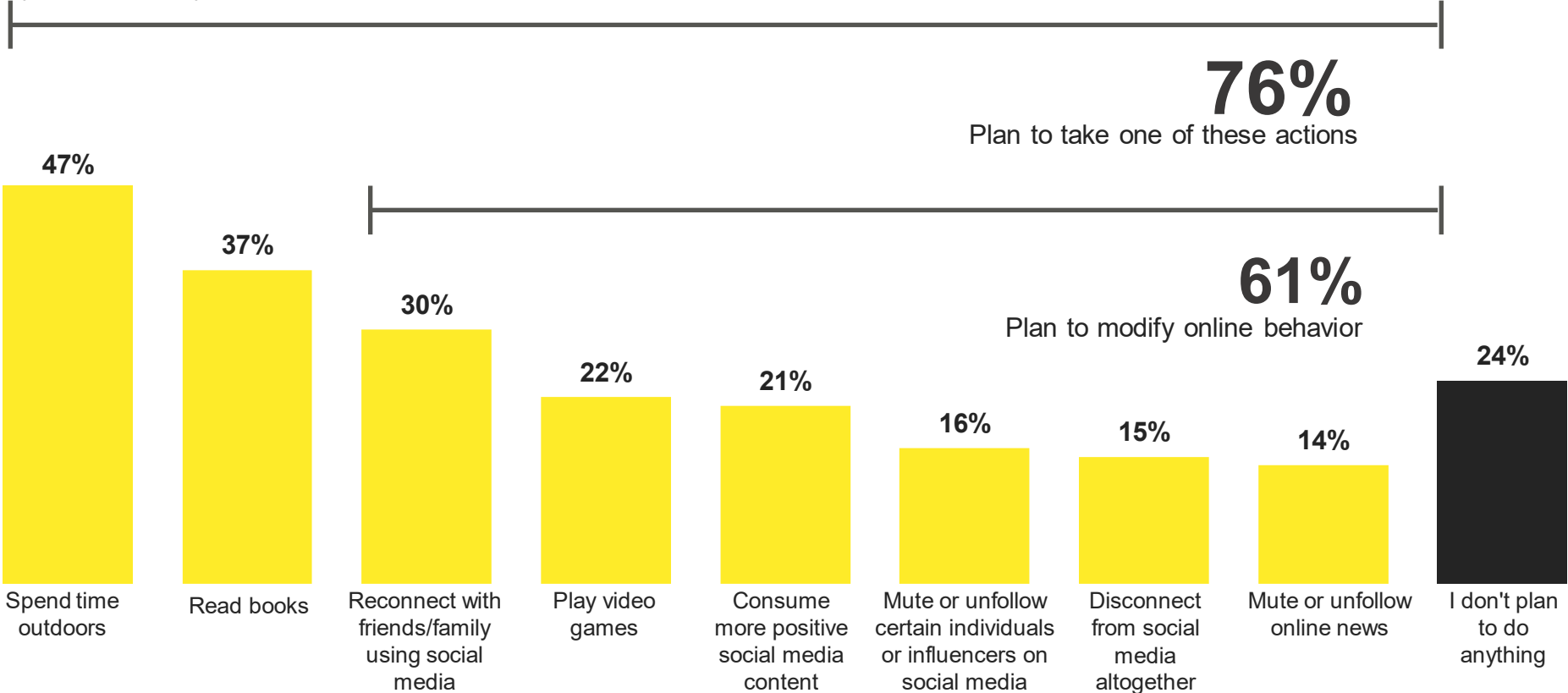
## Areas Expected To Spend More Time Online

Among those who expect to spend more time online during holiday season



# Many Consumers Are Planning to Spend Time Online As A Way to Manage Their Mental Health During the Upcoming Holiday Season

Steps Plan To Take To Manage Mental Health During Upcoming Holiday Season  
(Global Total)

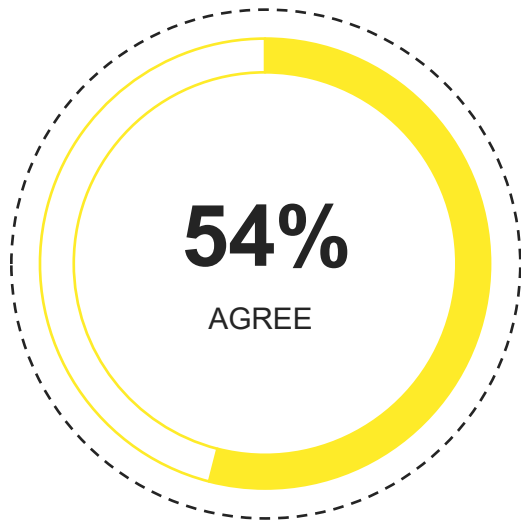


Plan to Modify Online Behavior (NET)

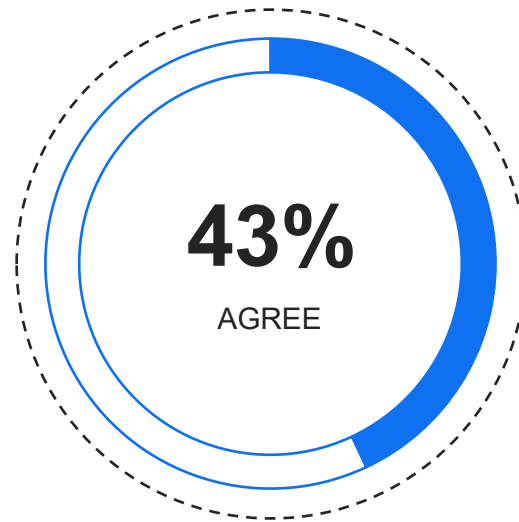
GLOBAL	61%
Australia	67%
France	64%
Germany	50%
India	87%
Japan	29%
New Zealand	65%
UK	59%
US	63%

# Over Half of Adults Globally Agree That Spending Time Online Helps Them Feel More Connected During the Holiday Season

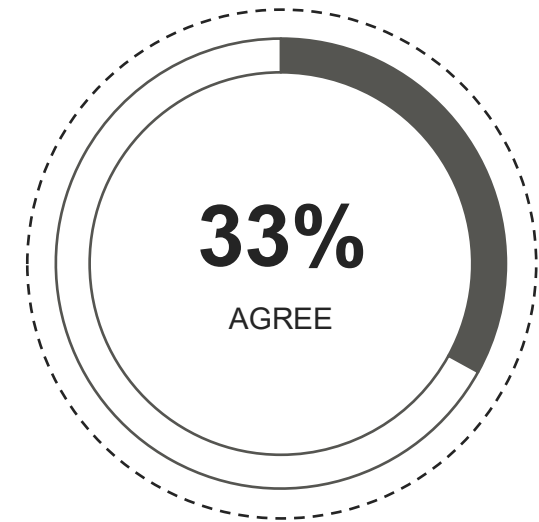
Agreement with Statements About Time Online and Mental Well-Being  
(Global Total)



Spending time online via my connected device(s) helps me feel more connected during the holiday season.



My mental well-being would suffer if I could not access my connected device(s) during the holiday season.

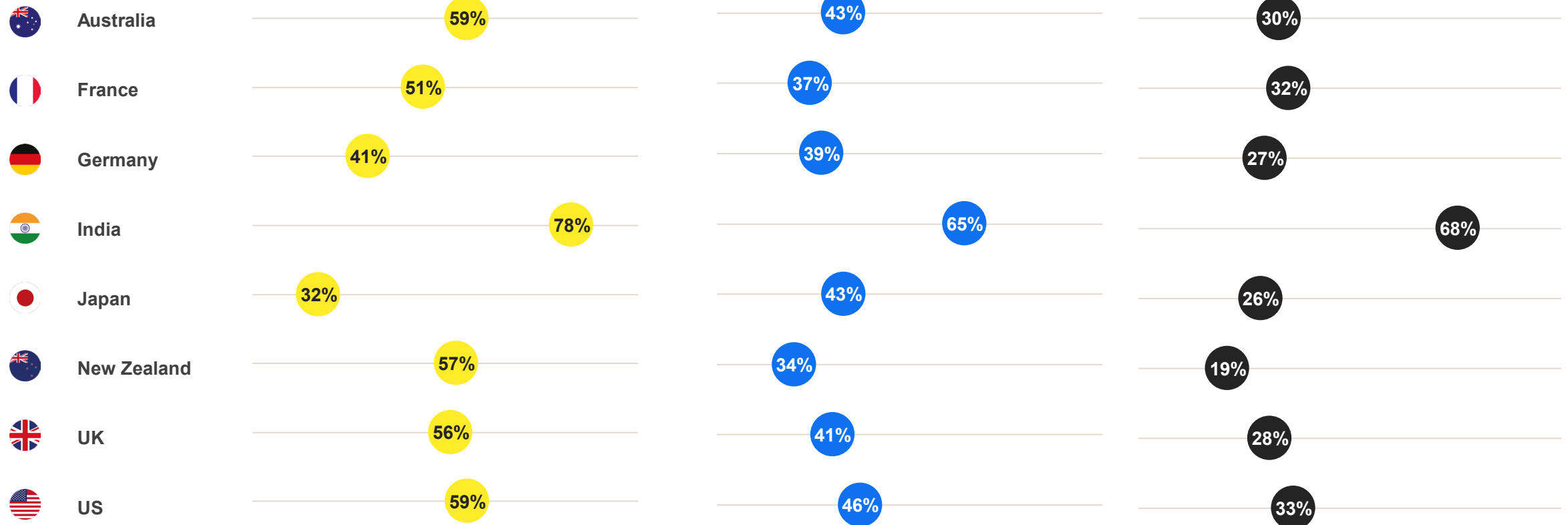


I would turn down a vacation or trip with my family if I wouldn't be able to access the internet on my connected device(s) while on the trip.

*% Strongly/Somewhat Agree*

# Adults in India, the U.S., and Australia Appear Most Reliant on Connected Devices for Their Mental Well-Being

## Agreement with Statements About Time Online and Mental Well-Being (By Country)



% Strongly/Somewhat Agree

# More Than 2 in 5 Consumers Use Connected Devices or Video Games as a Mental Wellness Break or Escape From Their Family or Friends During the Holiday Season

Agreement with Statements About Online Escapism  
(Global Total)



I often use my connected device(s) as a mental wellness break, as a form of escape from my family or friends, during the holiday season.

I often play video games as a mental wellness break or escape from my family or friends during the holiday season.

% Strongly/Somewhat Agree

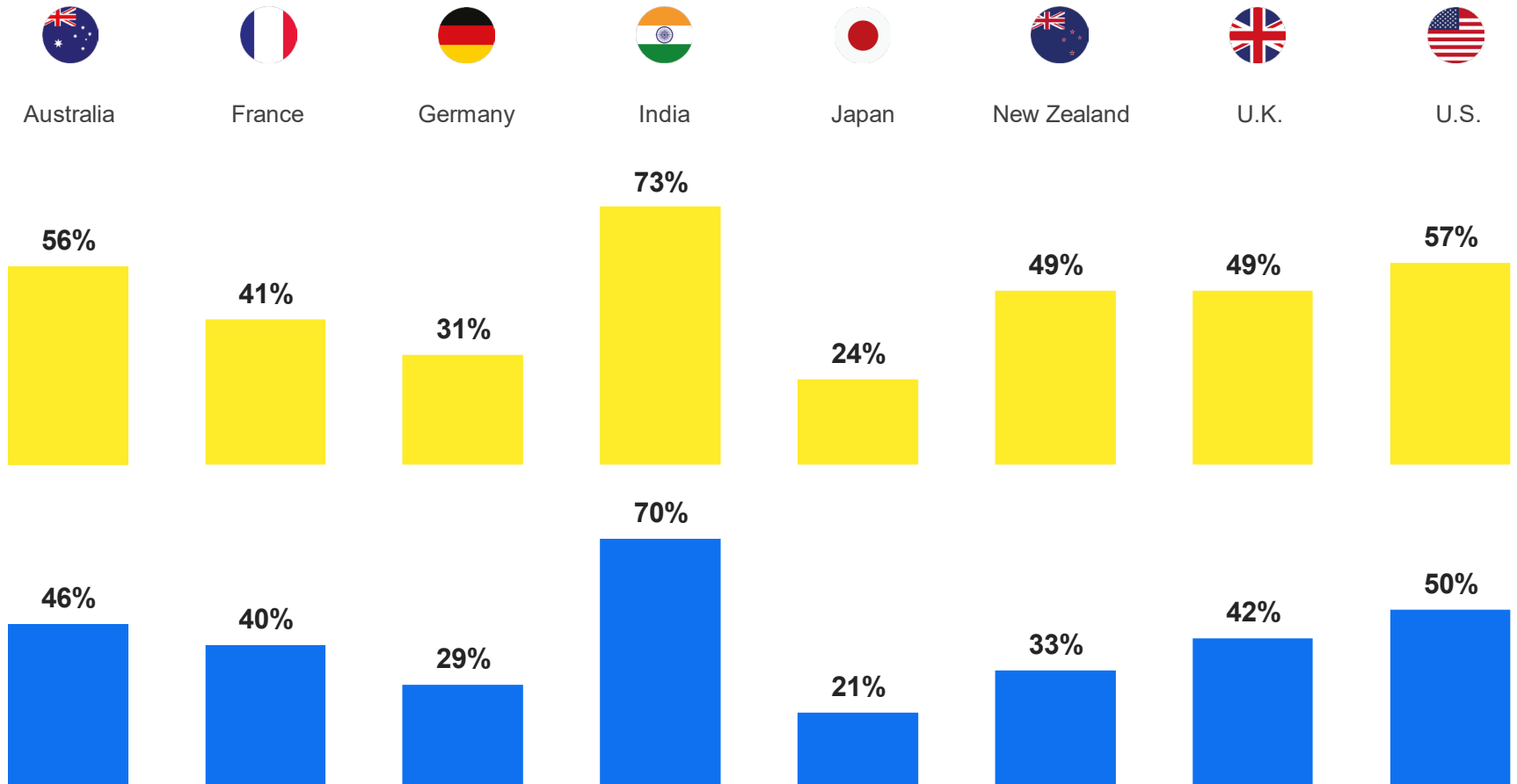
# Connected Device and Video Game Usage as a Mental Wellness Break or Escape is Highest in India, the U.S., and Australia

Agreement with  
Statements About Online  
Escapism  
(By Country)

I often use my connected device(s) as a mental wellness break, as a form of escape from my family or friends, during the holiday season.

I often play video games as a mental wellness break or escape from my family or friends during the holiday season.

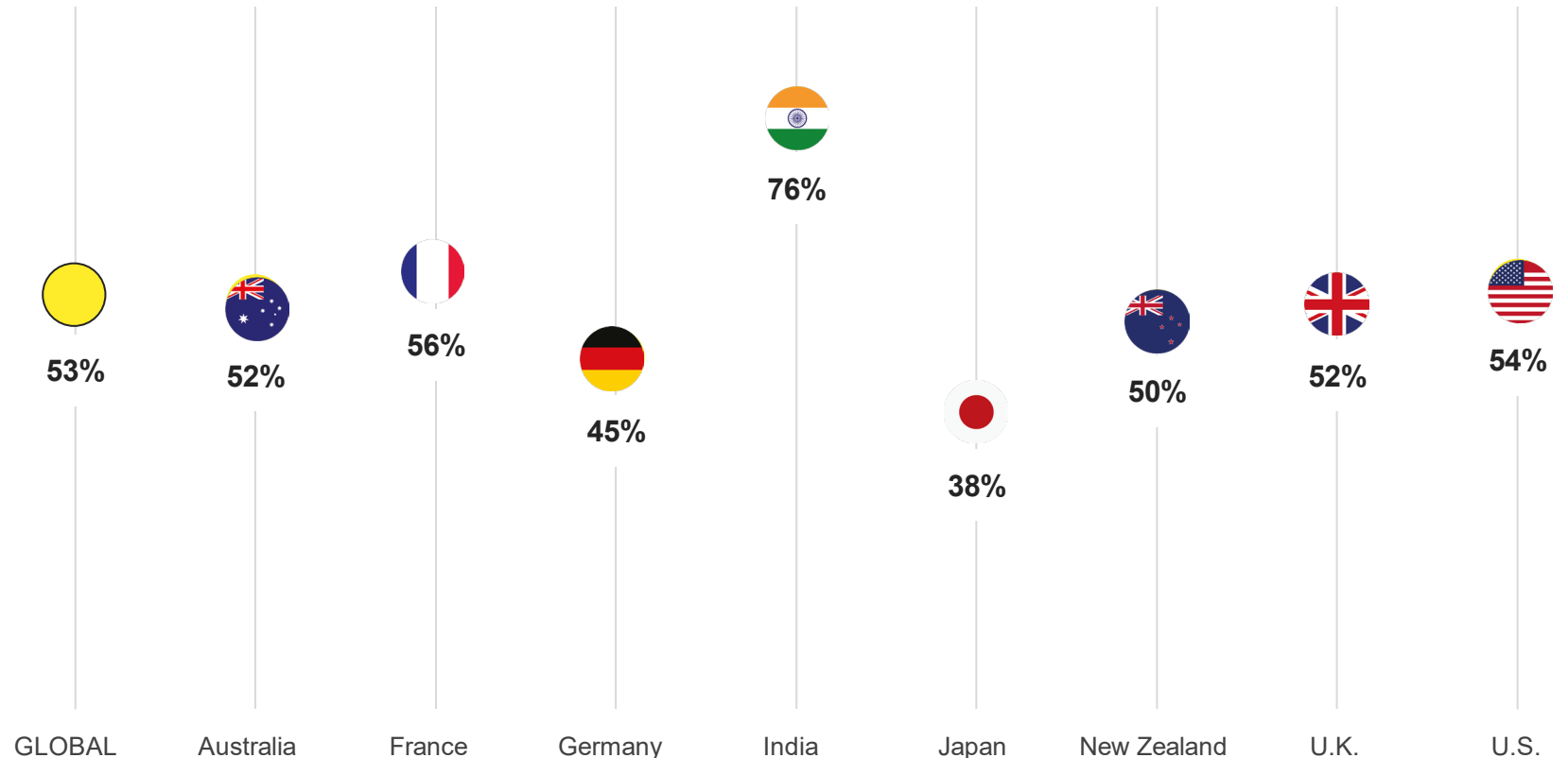
% Strongly/Somewhat Agree



# Despite These Benefits, Consumers Plan to Scale Back on the Amount of Time Spent Online to Improve Their Well-Being in the New Year

## Agreement with Statement About Time Online in the New Year

In the new year, I plan to cut back on the amount of time I spend online in order to improve my well-being.



% Strongly/Somewhat Agree





# Demographics



# 2022 Global Demographics

