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UNISYS Security Index: Global Summary

6 April 2009 (Wave 4)

Lieberman Research Group

White Paper

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Introduction

The Unisys Security Index™ is a global research endeavour that gauges public perception of major security issues in nine countries. Conducted twice a year, the Index provides a statistically robust monitor of concerns about four areas of security:

- National security including concerns related to terrorism and health epidemics
- Financial security regarding financial fraud and ability to meet personal financial obligations
- Internet security related to spam, virus and online financial transactions
- Personal security concerning physical safety and identity theft

The current survey, Wave 4, also gauges consumers' expectation of a higher level of risk to them personally of identity theft and threats such as bankcard fraud as a result of the current worldwide economic crisis.

Security indices are based on surveys in each of the nine countries where the Index is developed. The total number of consumers surveyed for Wave 4 is 8,503.

- Australia (n=1201)
- Belgium (n=816)
- Brazil (n=1500)
- Germany (n=957)
- Netherlands (n=500)
- New Zealand (n=506)
- Spain (n=1045)
- UK (n=974)
- US (n=1004)

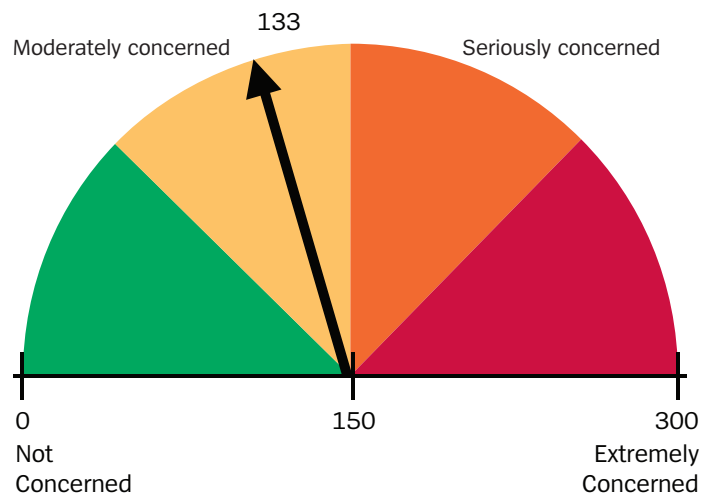
Unisys strives to provide a secure environment for the technology products and services it provides to the governments and major industries in the nine countries surveyed. Unisys' commitments to public and fiscal safety and security are the primary reasons for the creation of this index to monitor progress in these areas.

Organizations and governments today confront potential security threats that didn't exist a decade ago, or, if they did, were not seen as such a pressing concern. These security threats are global and their effects impact individuals on a daily basis. Unisys' approach to security goes beyond 'bits and bytes' recognizing that there are a broad set of political, economic and consumer forces that impact the security 'ecosystem'. We believe that the most effective solutions are going to be those formed through collaboration across interests. Through the Unisys Security Index, we are committed to informing that discussion.

Overall Findings

The Unisys Security Index scale runs from 0 to 300, where 0 represents no concern and 300 represents extreme concern. This index measures how secure survey respondents feel regarding National Security, Financial Security, Internet Security and Personal Security.

The average score for citizens of the nine countries surveyed is 133, representing a moderate level of concern, although this reflects significant variation between countries surveyed – from serious levels of concern (in Brazil) to quite low levels (in the Netherlands).



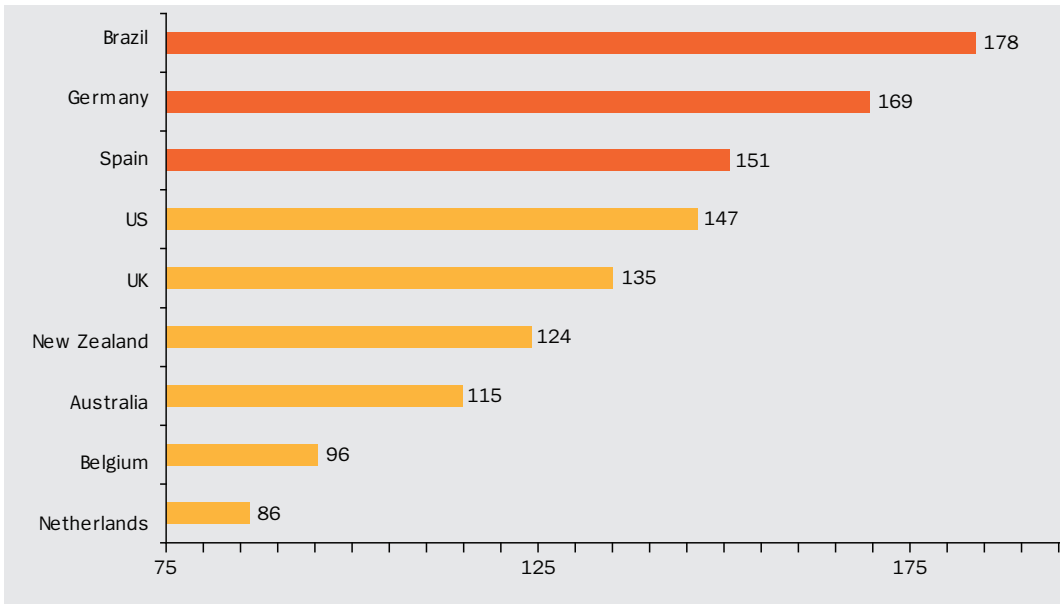


Chart 1: Security Index for each country in the Wave 4 survey

Concern about security is highest in:

- Brazil
- Germany

Concern about security is lowest in

- The Netherlands
- Belgium

Adults in the nine countries surveyed are most concerned about financial security and least concerned about Internet security.

Residents of Brazil and Germany rank at or near the highest level of concern in all four areas, particularly Internet and personal security.

Residents of the Netherlands and Belgium rank at or near the lowest level of concern in all four areas, particularly national security and financial security. Whether a reflection of confidence or complacency, this lack of worry sets Dutch and Belgian adults apart from the other countries.

Within individual countries, subgroups defined by gender, age, social class or region sometimes display significantly stronger or weaker concern about particular issues. While there is little consistency among all regions, in most countries women are more likely to worry about threats to national security, health and/or personal safety than are men.

Survey Methodology

The Unisys Security Index is based on national surveys of representative samples of adult residents, totaling 8,503 completed interviews with persons aged 18 and up. Interviews were conducted by telephone except in Belgium, in which they were conducted face-to-face. The details of this program are as follows:

- All national surveys conducted in February and March 2009
- National respondents are randomly selected from households in the nine countries and accord with robust statistical sampling methods
- The sample is weighted with respect to demographic characteristics such as gender, age, region, town size, education and occupation. Weighting is applied at the national (rather than global) level
- Global security indices are unweighted averages of the nine countries' security indices

Security Indices

In each national survey, respondents are asked whether they are concerned or not concerned about eight security-related issues (questions appear below). If they are concerned about an issue, they then describe their level of concern (extremely concerned, very concerned or somewhat concerned). The proportions of respondents describing themselves as “extremely,” “very” and “somewhat” concerned are multiplied by different weighting factors (the weight for “extremely” is three times that of “somewhat”) and added together to derive a rating for the question.

Pairs of related questions (see below) are then averaged together to construct the following four security indices:

- National Security Index
- Financial Security Index
- Internet Security Index
- Personal Security Index

The four Security Issue indices are then averaged to derive the Unisys Security Index.

The National Security index is derived from the following questions:

1. National security in your country (for the US, UK and the ANZ countries, the question reads, “National security in relation to war or terrorism”)
2. A serious health epidemic occurring in your country

The Financial Security index is derived from the following questions:

3. Other people obtaining and using your credit or debit card details
4. Your ability to meet your essential financial obligations, such as your mortgage, other loan, credit card or bill payments

The Internet Security index is derived from the following questions:

- 5. Computer security in relation to viruses or unsolicited emails
- 6. The security of shopping or banking online

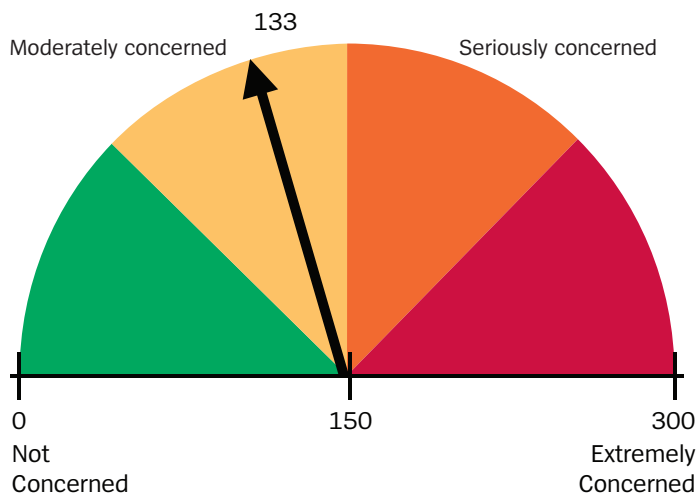
The Personal Security index is derived from the following questions:

- 7. Unauthorized access to or misuse of your personal information
- 8. Your overall personal safety over the next six months

In addition to these questions, the Unisys Security Index has the capacity to include additional questions which can be correlated with the broader Index results. These may or may not be consistent across all markets where the Unisys Security Index is conducted. For Wave 4, respondents in all markets were asked whether they believe that the current worldwide economic crisis will increase the risk to them personally of experiencing identity theft or other frauds.

The Unisys Security Index

The Unisys Security Index of 133 indicates that concern about security is moderately high, but that many people remain fairly relaxed about national, financial, Internet and personal security. The most relaxed attitudes are found in the Benelux countries.



Overall, financial, personal, and national security threats provoke the most worry.



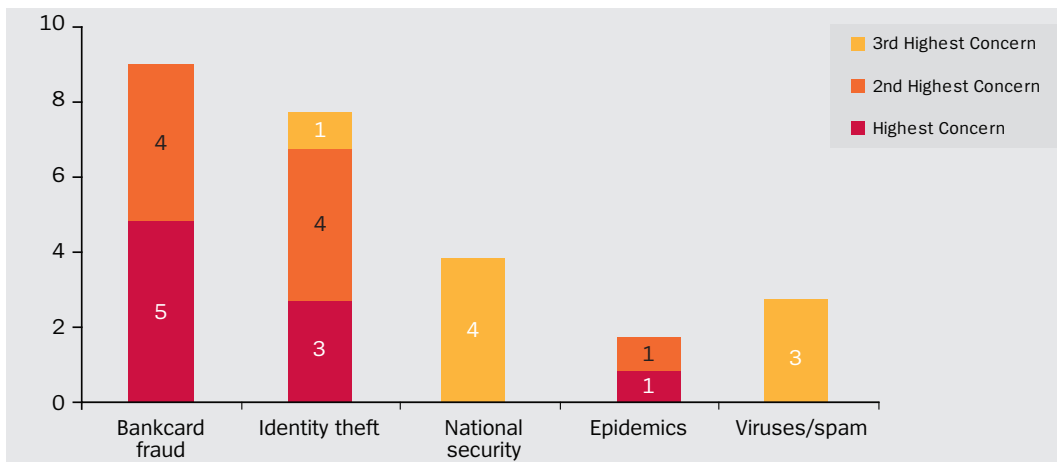
Top-Ranked Concerns Across all Countries

Bankcard fraud is the greatest single area of concern across all markets, with concerns about misuse of credit or debit card details being the top concern among adults in five countries and the number two concern in four more countries (Chart 2).

Identity theft is the second greatest area of concern across the countries surveyed. It was the number one concern in three countries and the number two concern in four more.

National security is the third-ranked threat in four countries.

Financial obligations, despite the severity of the current worldwide financial crisis, fail to appear among the top three concerns in nine of the ten countries surveyed.



This chart indicates the number of countries where threats are of highest, second highest, and third highest concern. For example, in 5 countries, Bankcard Fraud was of the highest concern.

Chart 2: Number of countries where most worrisome threats are highest concern, second highest concern or third highest concern

Trends

Since the Wave 3 survey, the Unisys Security Index has increased by three points, to 133. This increase is fueled by a ten-point jump in the Internet Security Index and a significant increase in the Financial Security Index.

The National Security Index continues its downward trend, while the Personal Security Index is essentially flat since Wave 3.

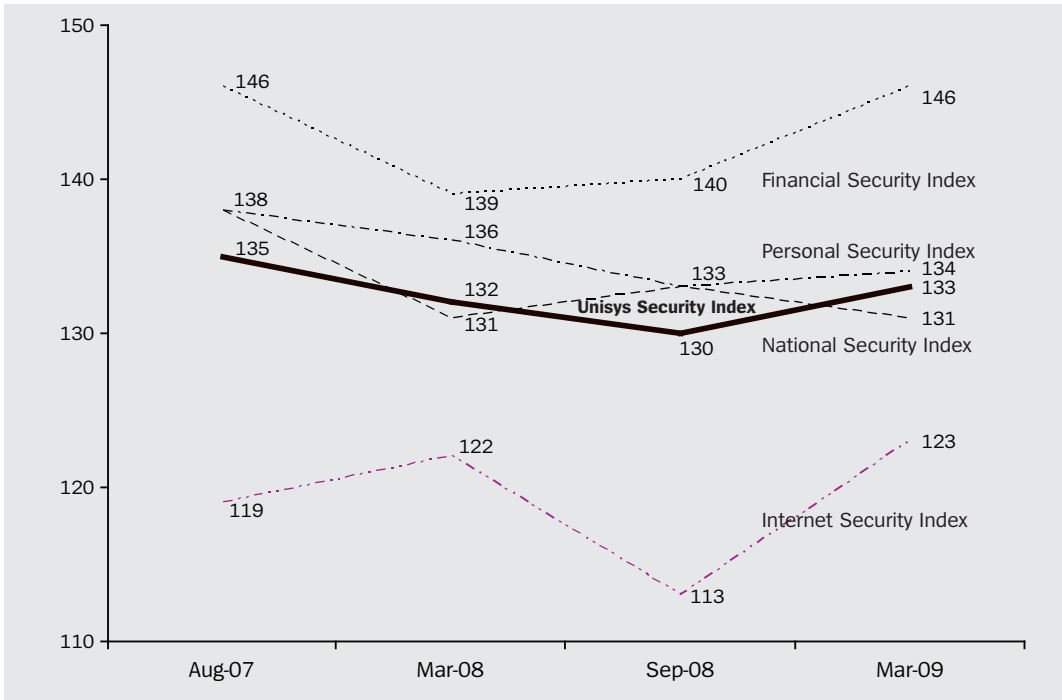


Chart 3: Security Index trends

Since the Wave 3 survey, the Unisys Security Index has risen noticeably in New Zealand and Spain, while Germany and the UK also present strong increases (Chart 4). Only Brazil shows a noticeable decline in concern.

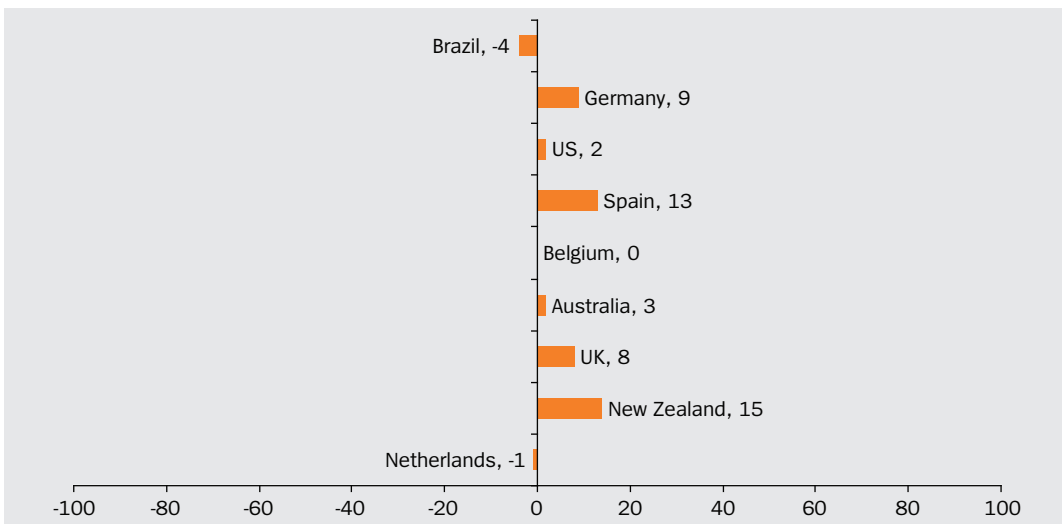


Chart 4: Change in Security Index from Wave 3 to Wave 4 Security Index surveys (individual countries)

By a large margin, people consistently worry more about identity theft and bankcard fraud than about other threats (Chart 5). However, since Wave 3 the level of concern about Internet security (online transactions, viruses and spam) has increased, as has concern about meeting financial obligations.

By contrast, concern about epidemics and personal safety has trended downwards since Wave 3.

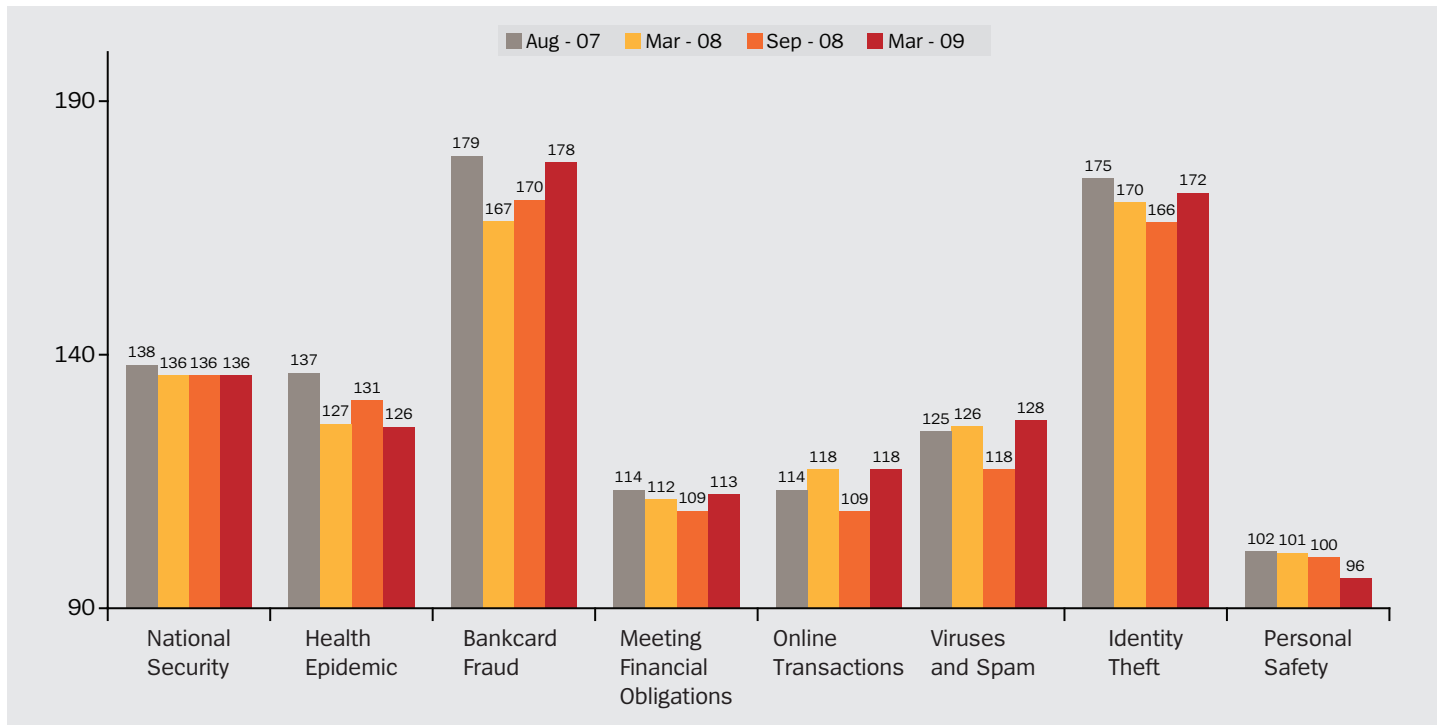


Chart 5: Comparison of findings from the four Security Index surveys (nine countries)

Issue: Financial Security

The Financial Security Index reflects concerns about (1) ability to meet financial obligations and (2) the risk of bankcard fraud. Residents of Germany and Brazil worry most about financial security, and Spain and US are also instances of “serious concern” – i.e., indices over 150 (Chart 6).

Belgium and the Netherlands report the least concern.

Financial fraud is the key driver of concern levels in this category. Theft or misuse of credit or debit card details is a source of serious concern (i.e. indices over 150) in all countries except for Belgium and the Netherlands (Charts 7-8).

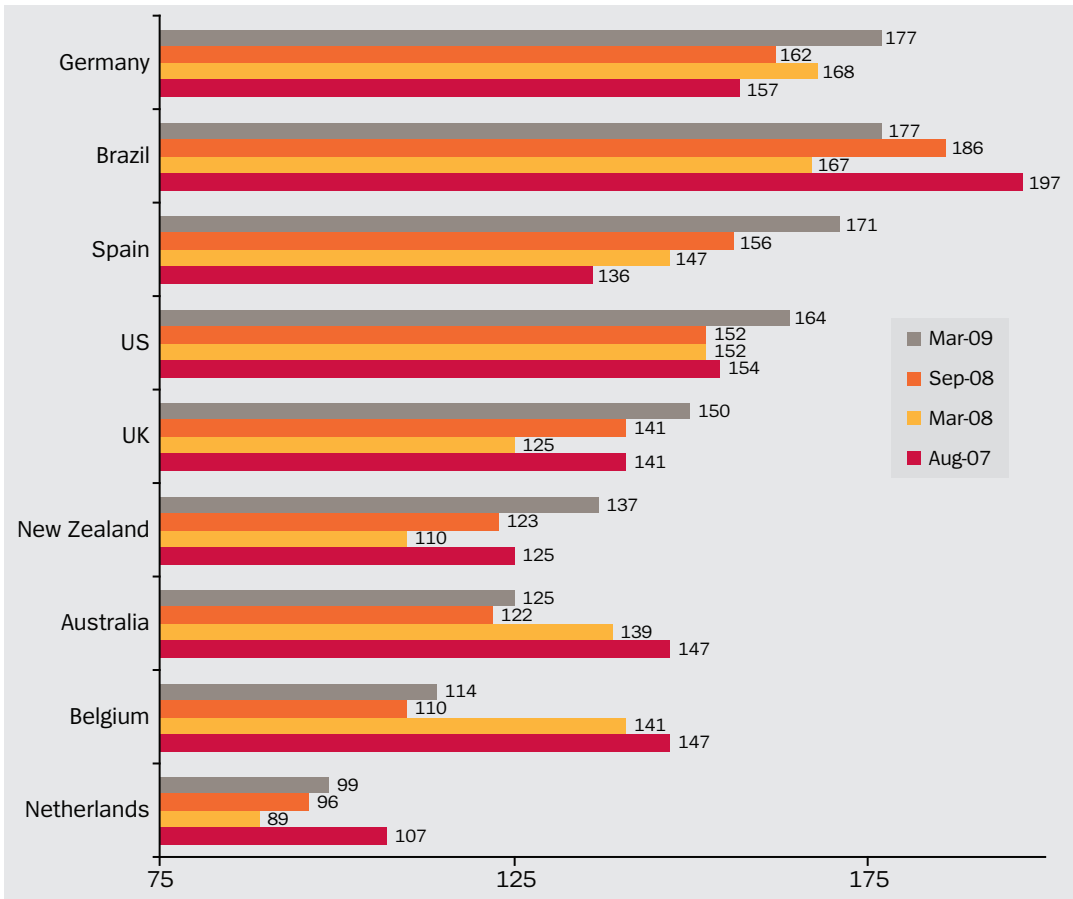


Chart 6: Financial Security Index, by country

Countries With Serious Concerns About Financial Security

The following chart shows the indices for the individual questions on meeting financial obligations and risk of bankcard fraud. In all four countries, concern about other people obtaining and using credit/debit card details is by far the larger contributor to financial worry.

Consumers worry about bankcard fraud regardless of whether or not they come from high-income countries. Similarly, concern about meeting financial obligations does not correlate strongly with per capita income.

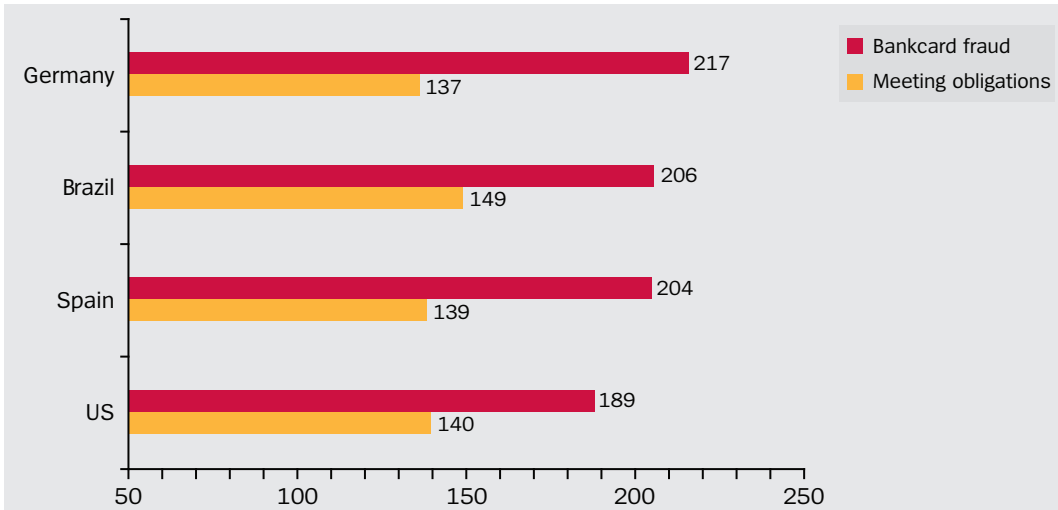


Chart 7: Indices for meeting financial obligations and bankcard fraud (countries with serious concern)

Countries With Moderate Concerns About Financial Security

Five countries display moderate levels of concern about financial security. Residents in these countries are relatively confident in their ability to meet financial obligations (especially the Netherlands). By contrast, residents in three countries (New Zealand, Australia and UK) are seriously concerned about bankcard fraud.

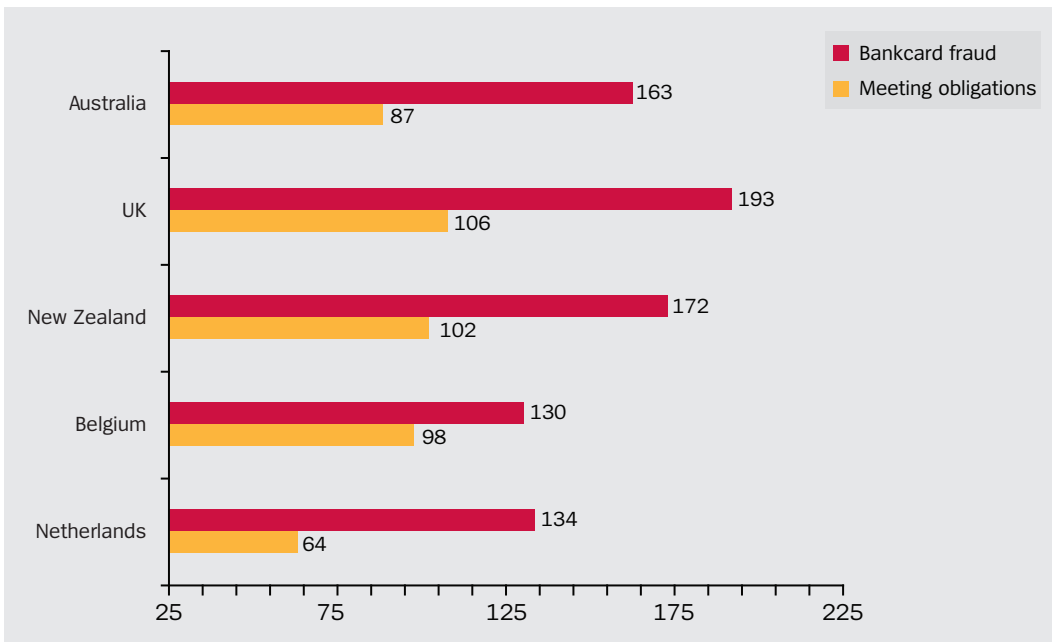


Chart 8: Indices for meeting financial obligations and bankcard fraud (countries tending toward moderate levels of concern)

Issue: National Security

The National Security Index focuses on (1) national security and (2) the risk of epidemics. For four countries, the National Security Index reflects “serious concern” – i.e., a value over 150.

Three of the remaining countries reflect “moderate” levels of concern (values of 75-149), while Belgium is at 74 and the Netherlands has an index of only 67.

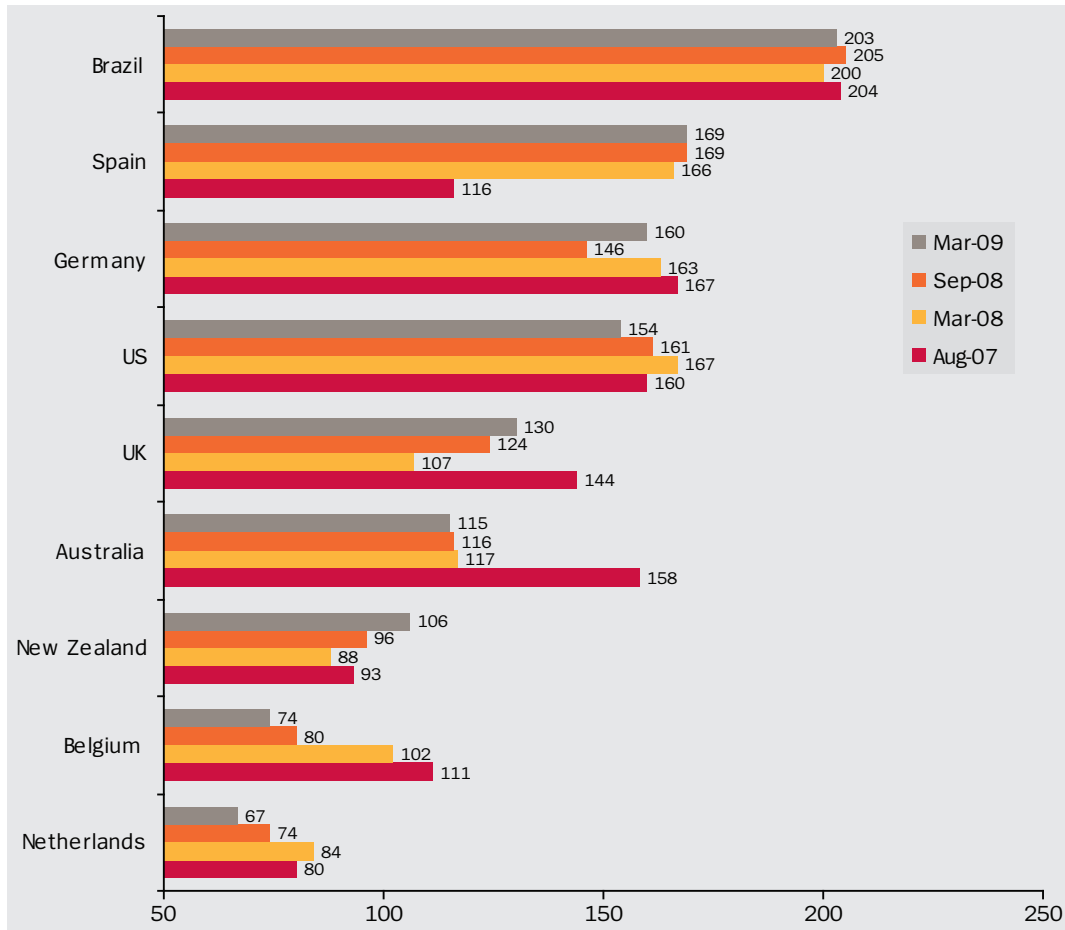


Chart 9: National Security Index by country

Countries With Serious Concerns About National Security

The following chart shows the indices for the individual questions on national security and epidemics for countries with the greatest concern about national security. The US is not very worried about epidemics, compared with national security related to war or terrorism, but the other countries are at least as worried about epidemics as national security if not more so.

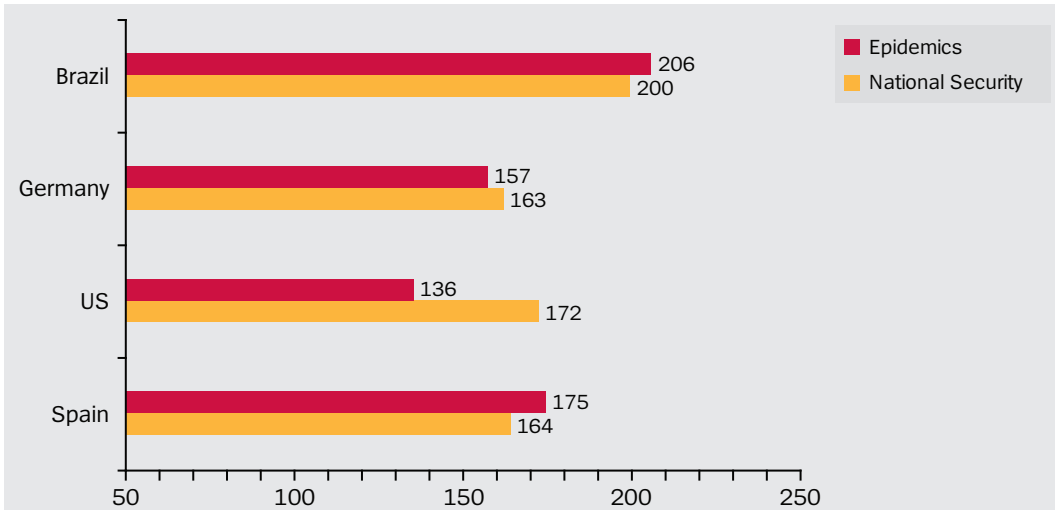


Chart 10: Indices for national security and epidemics (countries with serious concern about national security)

Countries With Moderate Concerns About National Security

The countries with moderate concerns about national security tend to worry more about national security than epidemics, except in the case of New Zealand.

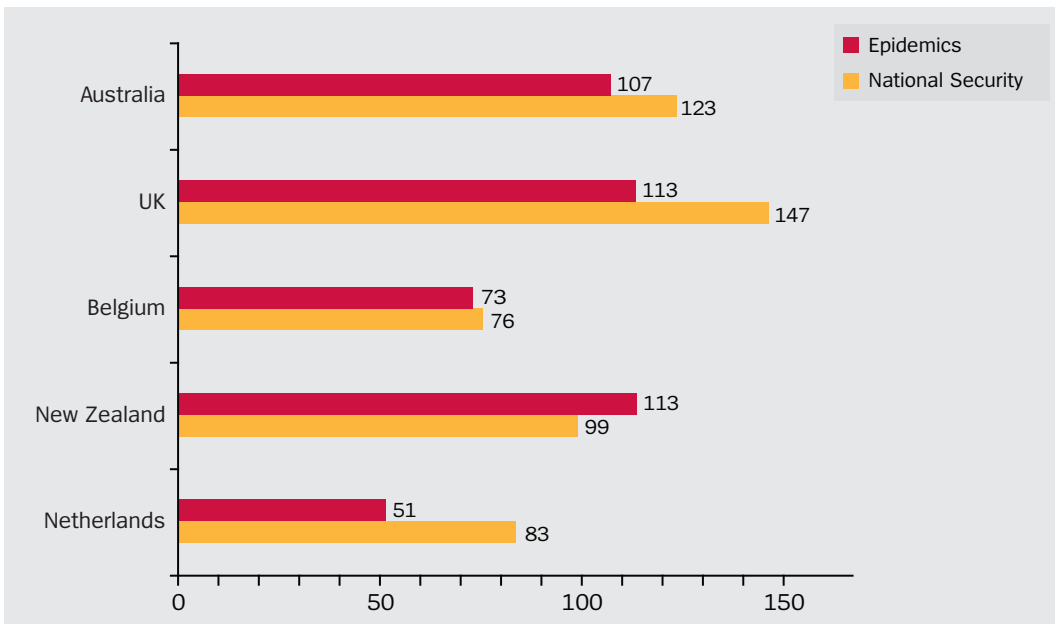


Chart 11: Indices for national security and epidemics (countries with moderate concern about national security)

Issue: Personal Security

The Personal Security Index reflects concerns about (1) personal safety and (2) identity theft. Only Brazil and Germany fall in the “serious concern” segment – i.e., a value over 150.

The remaining countries have “moderate” levels of concern (values of 75-149). Again, Dutch respondents are comparatively blasé about these threats.

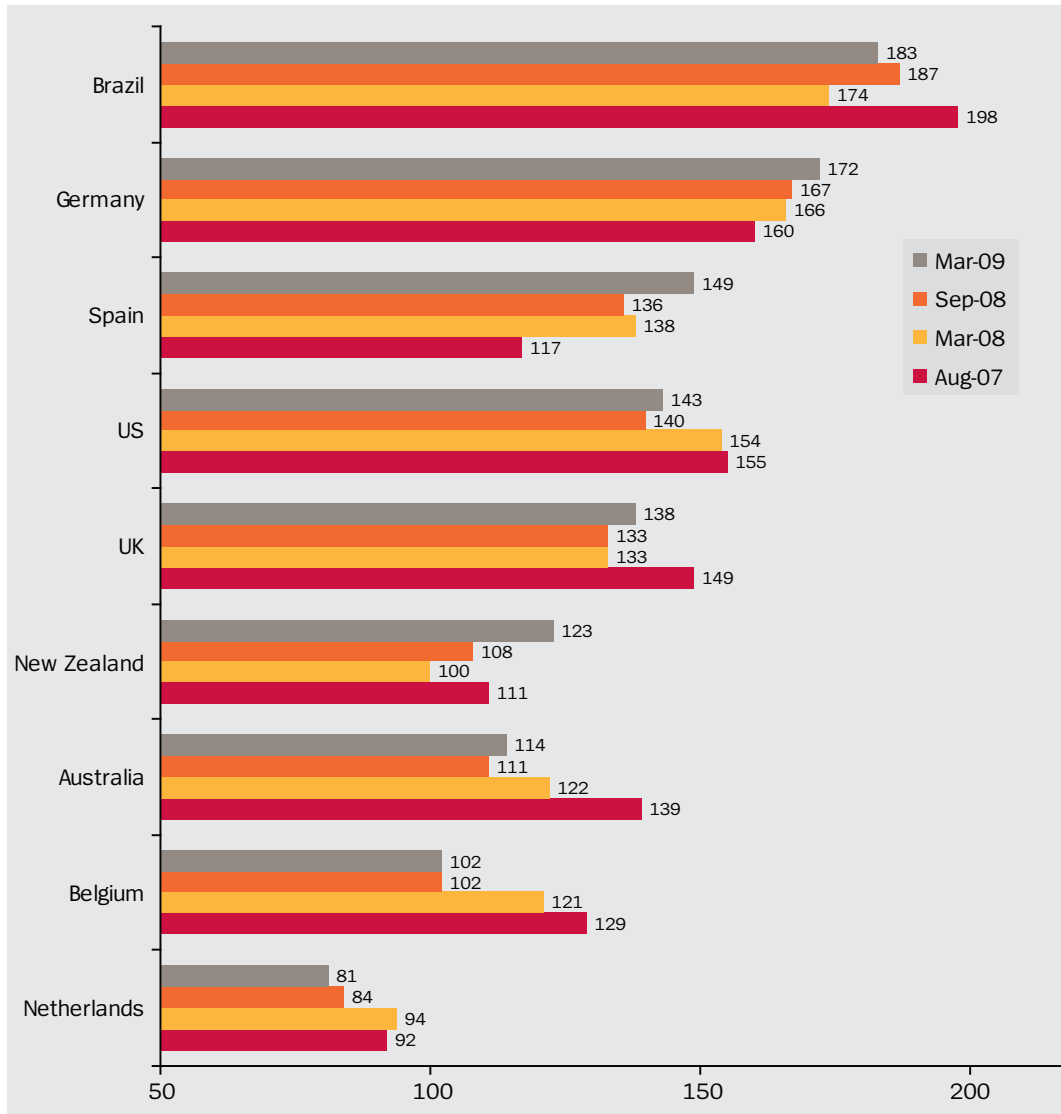


Chart 12: Personal Security Index by country

Countries with Serious Concerns About Personal Security

The following chart shows the indices for the individual questions on personal safety and identity theft. Brazilians have serious concerns about both threats, while Germans worry mainly about identity theft.

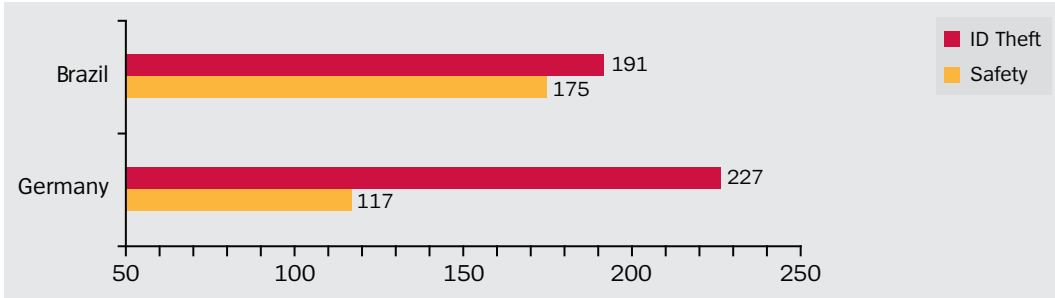


Chart 13: Indices for personal safety and identity theft (countries with serious levels of concern)

Countries With Moderate Concerns About Personal Security

The seven countries with moderate concern about personal security also worry much more about identity theft than personal safety – especially in the Netherlands, where the Personal Safety Index is only 35.

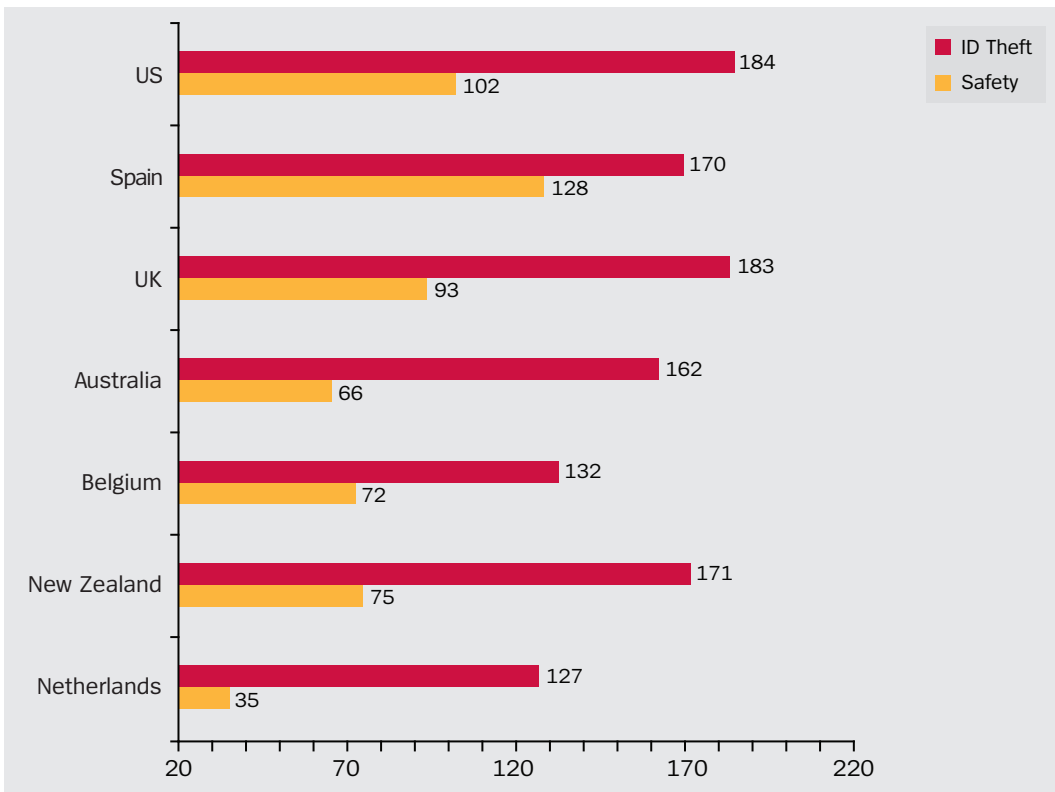


Chart 14: Indices for personal safety and identity theft (countries with moderate levels of concern)

Issue: Internet Security

The Internet Security Index reflects concerns about (1) online shopping and banking and (2) viruses and spam. These issues produce the least amount of concern. Only Germany, with an unusually strong preoccupation with viruses and spam, falls into the “serious concern” category.

The remaining countries have “moderate” levels of concern (values of 75-149).

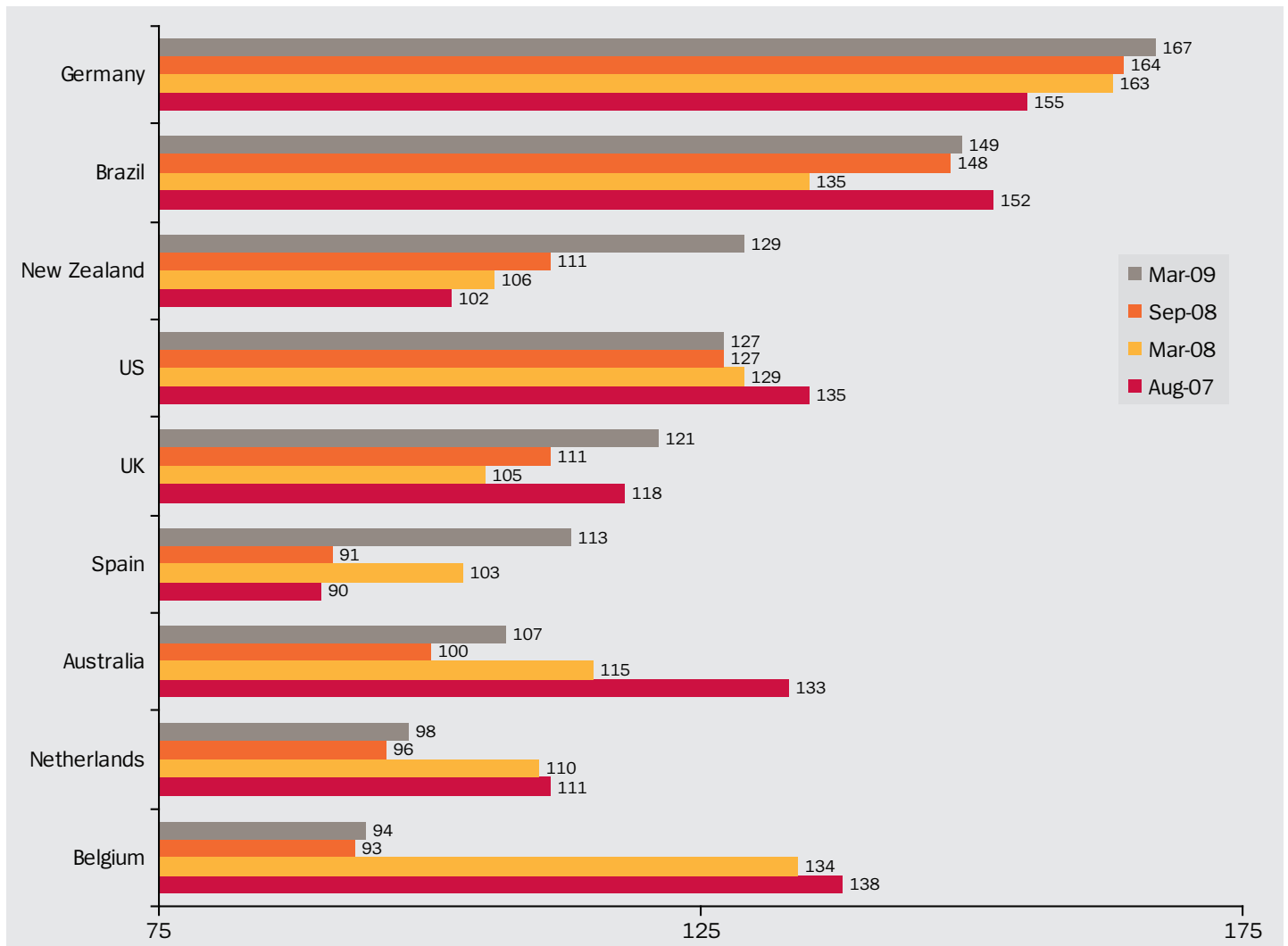


Chart 15: Internet Security Index by country

Two European Countries With Very Different Attitudes Concerning Internet Security

The following chart shows the indices for the individual questions about viruses/spam and e-commerce. Germans, who worry most about these threats, are compared with Belgians, who worry the least.

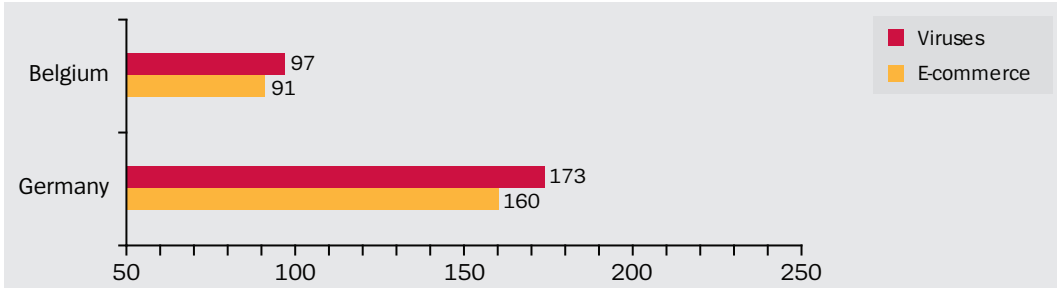


Chart 16: Indices for viruses and e-commerce (Germany and Belgium)

Countries With Moderate Concerns About Internet Security

Generally, viruses and spam contribute more to the moderate levels of concern of these countries than does worry about e-commerce, but the disparity in concern is often not great (Chart 17).

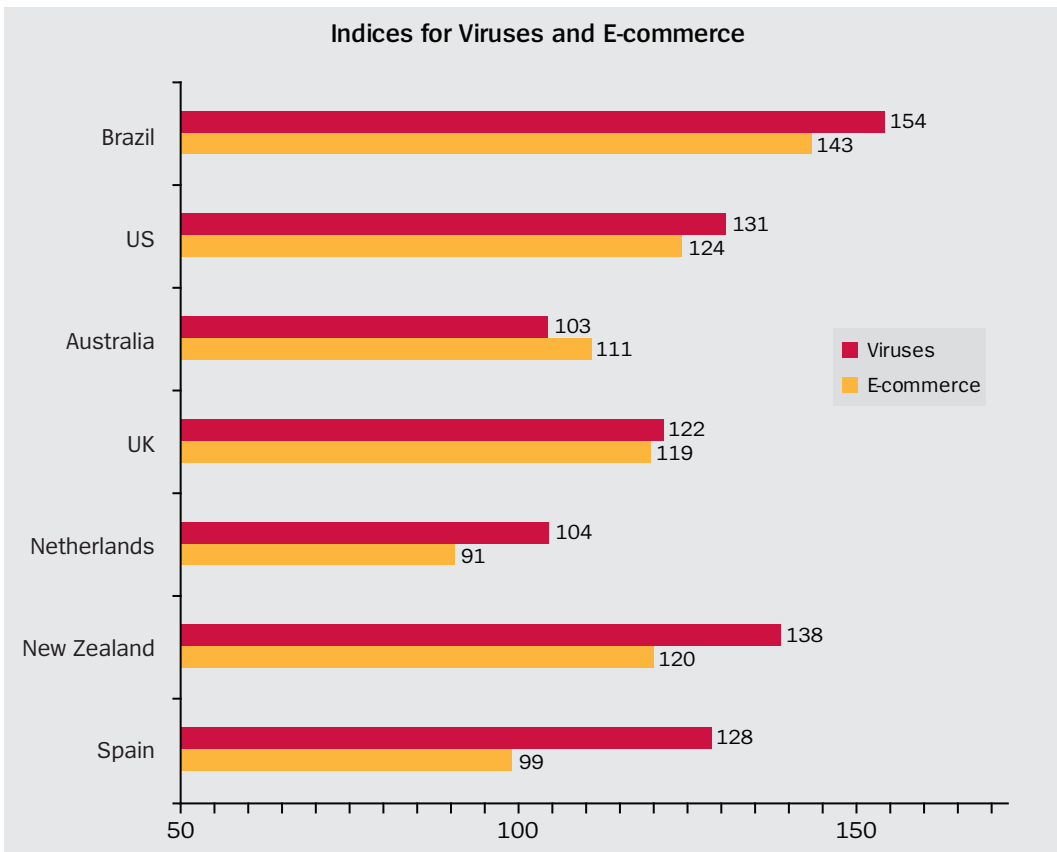


Chart 17: Indices for concern with online transactions and viruses / spam (countries with moderate levels of concern)

Supplemental Question

Issue: The current world financial crisis may create an increased risk of fraud. Do you believe that as a result of this crisis, the level of risk to you personally of identity theft and related crimes such as credit card fraud will increase or decrease?

This is a major issue for the majority of countries surveyed. Leading the way is Spain, where over eight of ten Spaniards feel that the world financial crisis will increase the risk that they will personally experience identity theft or related crimes. Although Spain is the most worried country, the majority of respondents in most other countries also share this fear. Nearly three-quarters of Americans share the concern. It is interesting that in Germany, where the concern over financial issues is so high, that they give a rather tepid response when compared with other countries. The Netherlands, where only 32% say they expect the level of risk to “greatly increase” or “somewhat increase,” is uniquely unconcerned about this threat.

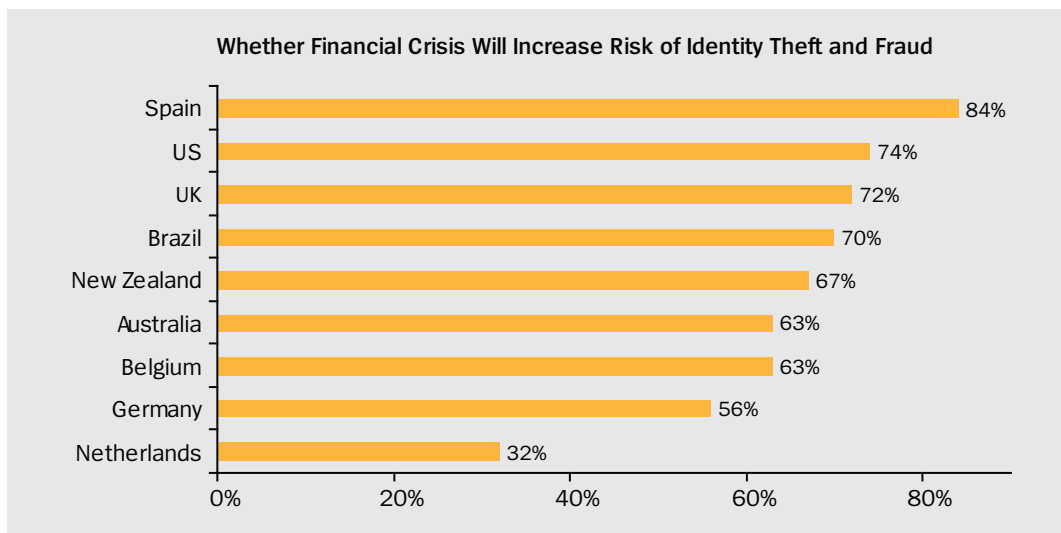


Chart 18: Expectations about increased risk (top-2-box scores – “Greatly increase” + “Increase somewhat”)

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Unisys is a worldwide information technology company. We provide a portfolio of IT services, software, and technology that solves critical problems for clients. We specialize in helping clients secure their operations, increase the efficiency and utilization of their data centers, enhance support to their end users and constituents, and modernize their enterprise applications. To provide these services and solutions, we bring together offerings and capabilities in outsourcing services, systems integration and consulting services, infrastructure services, maintenance services, and high-end server technology. With more than 28,000 employees, Unisys serves commercial organizations and government agencies throughout the world. For more information, visit www.unisys.com.

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Lieberman Research is the only US member of The Global Research Alliance – an international consortium of independent market research firms in over 20 countries that provides access to interviewing facilities internationally as well as local knowledge and input critical to successful international studies.

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