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Unisys Security Index: Global Summary

December 1, 2008 (Wave 3)

Conducted for: Unisys Corporation

Conducted by: Lieberman Research Group

White paper

A decorative graphic consisting of several overlapping, thin, dark blue circles of varying sizes, creating a sense of motion and depth. The word "security" is centered within this graphic.

security

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Introduction

The Unisys Security Index™ is a global research endeavour that gauges public perception of major security issues in 13 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 wave of research also gauges consumers' willingness to provide personal information (via PIN, password, photo, eye scan, etc.) to verify their identity with banks, government agencies and other organizations to prevent fraudulent misuse of their personal information (reported separately).

Security indices are based on surveys in each of the 13 countries where the Index is conducted. Each national sample enables statistical extrapolation to the national population. The total number of consumers surveyed for wave 3 was 12,139

- Australia (n=1204)
- Belgium (n=807)
- Brazil (n=1500)
- France (n=954)
- Germany (n=947)
- Hong Kong (jurisdiction of the country of China – n=899)
- Italy (n=979)
- Malaysia (n=873)
- Netherlands (n=500)
- New Zealand (n=498)
- Spain (n=997)
- UK (n=976)
- US (n=1005)

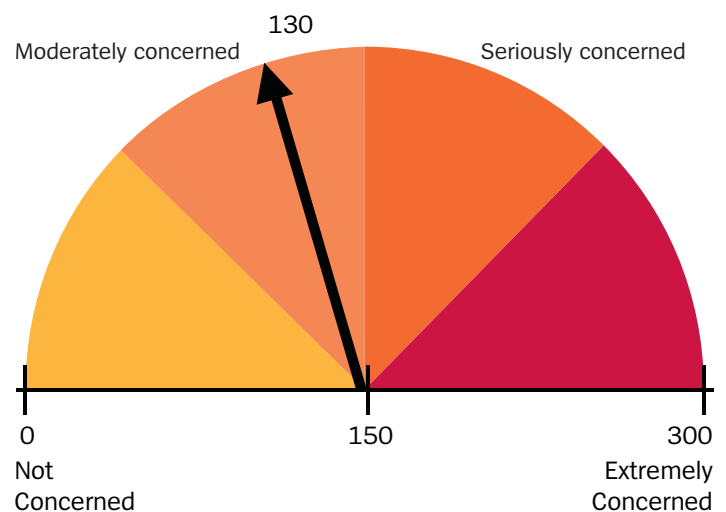
Unisys strives to provide a secure environment for the technology products and services it provides to the government and major industries in the 13 countries surveyed. Unisys commitments to public and fiscal safety and security are the primary reasons for the creation of this index to monitor progress 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 13 countries surveyed is 130, 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).



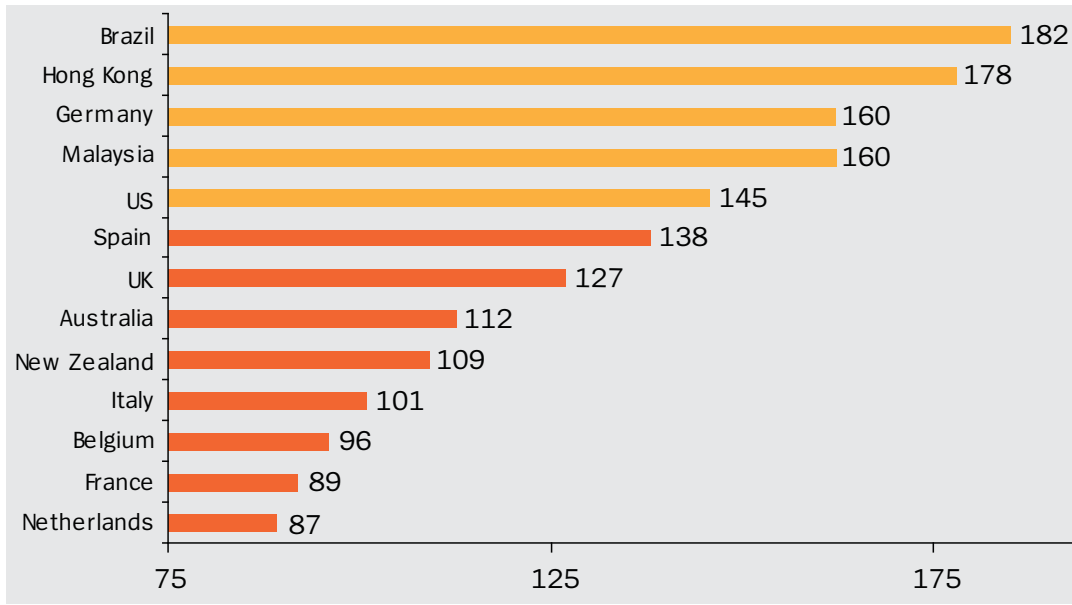


Chart 1: Security Index for each country in the wave 3 survey

Concern about security is highest in:

- Brazil
- Hong Kong
- Germany
- Malaysia

Concern about security is lowest in

- The Netherlands
- France
- Belgium
- Italy

Adults in the 13 countries surveyed are most concerned about financial security and least concerned about Internet security.

Residents of Brazil and Hong Kong rank at or near the highest level of concern in all four areas, particularly financial fraud and identity theft.

Residents of the Netherlands and France rank at or near the lowest level of concern in all four areas. Whether a reflection of confidence or complacency, this lack of worry sets Netherlanders and the French 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 consistently 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 a national telephone surveys of individual representative sample groups, totaling 12,139 persons aged 18 and up. The details of this program are as follows:

- All national surveys conducted in September 2008
- National respondents are randomly selected from households in the 13 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 13 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 Asia/Pac 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

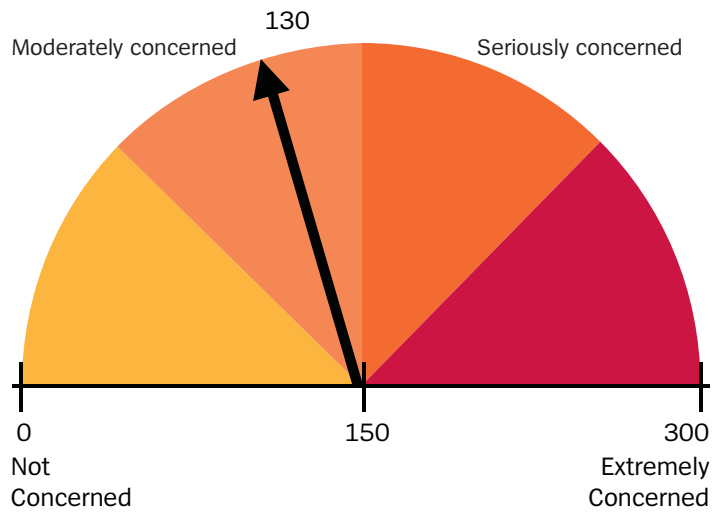
In addition to these questions, the Unisys Security Index has the capacity to add-in variable additional questions which can be correlated with the broader Index results. These may or may not be consistent across all markets where the Unisys Security Index is conducted.

For wave 3, respondents in all markets were asked about their willingness to provide personal information (via PIN, password, photo, eye scan, etc.) to verify their identity with banks, government agencies and other organizations to prevent fraudulent misuse of their personal information.

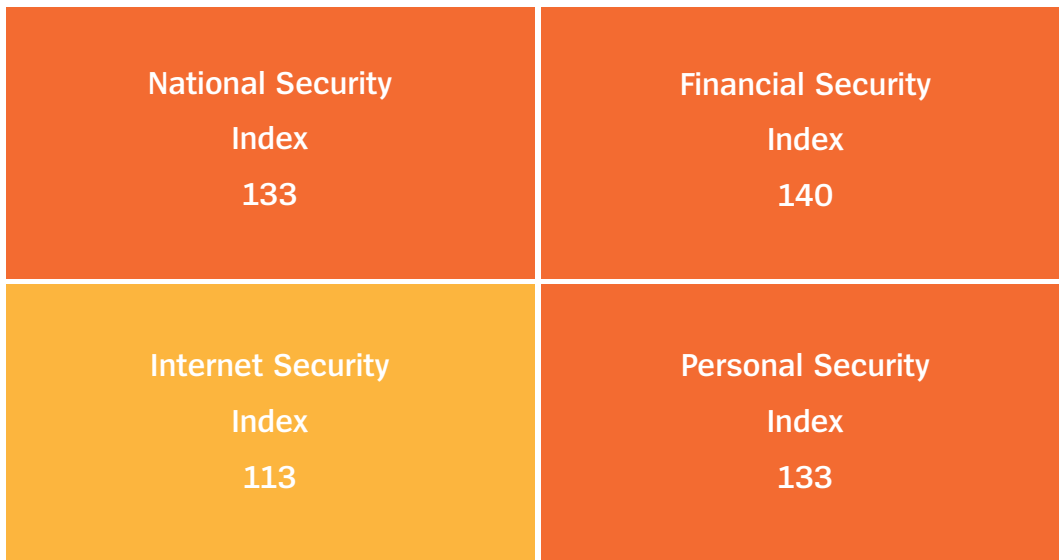
Results of the supplemental questions are summarized in a separate report.

The Unisys Security Index

The Unisys Security Index of 130 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 western European and Pacific countries. However, there are significant variations across countries.



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



Top-ranked concerns across all countries

Bankcard fraud is the greatest single consistent area of concern across all markets, with concerns about misuse of credit or debit card details ranking #2 or #1 in 11 countries out of the 13 (Chart 2).

Identity theft is the second greatest area of concern across all markets and is the #2 or #1 concern in 10 countries.

National security ranks among the top 3 concerns in about half of countries.

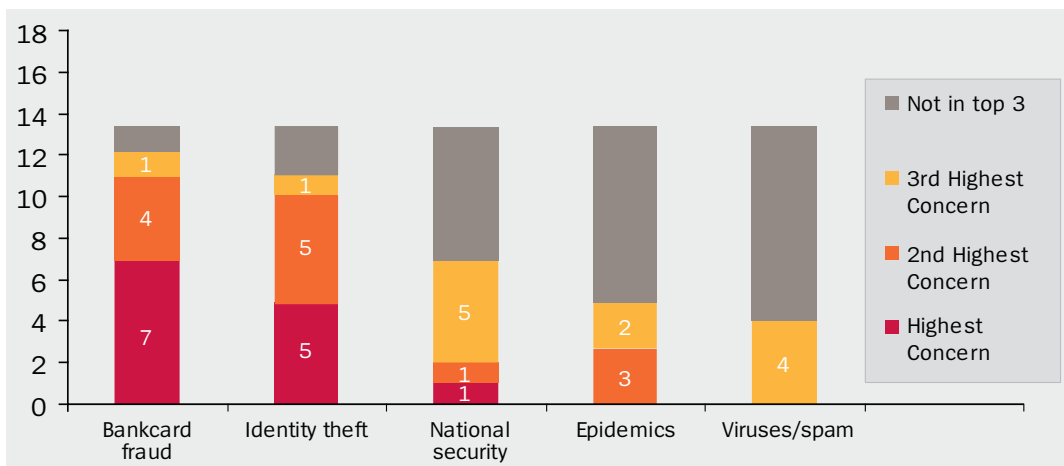


Chart 2: Number of countries where most worrisome threats are highest concern, second highest concern or third highest concern

Changes since August 2007

In the thirteen months since the August 2007 baseline survey (when the Unisys Security Index began to be monitored on a global basis in the thirteen countries), the global Unisys Security Index result has decreased by five points (Chart 3).

All four of the underlying security indices declined since the baseline survey, by roughly equal amounts. Again, this masks significant variability across individual countries surveyed.

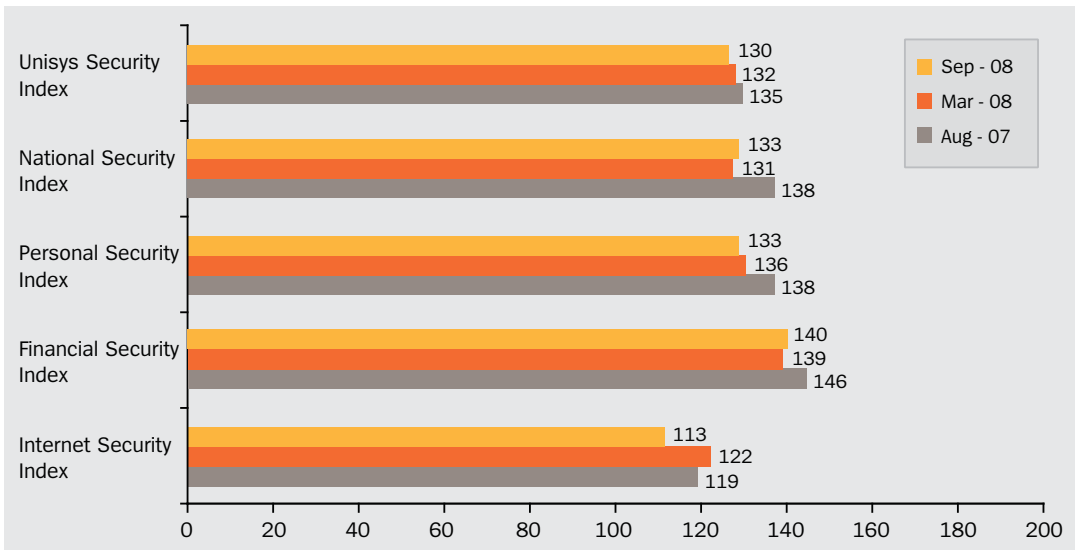


Chart 3: Comparison of findings from baseline, wave 2 and wave 3 Security Index surveys (13 countries)

Since the baseline survey, the Unisys Security Index has risen noticeably in Spain (Chart 4). However, the trend goes in the other direction in most other countries, particularly Belgium and Australia.

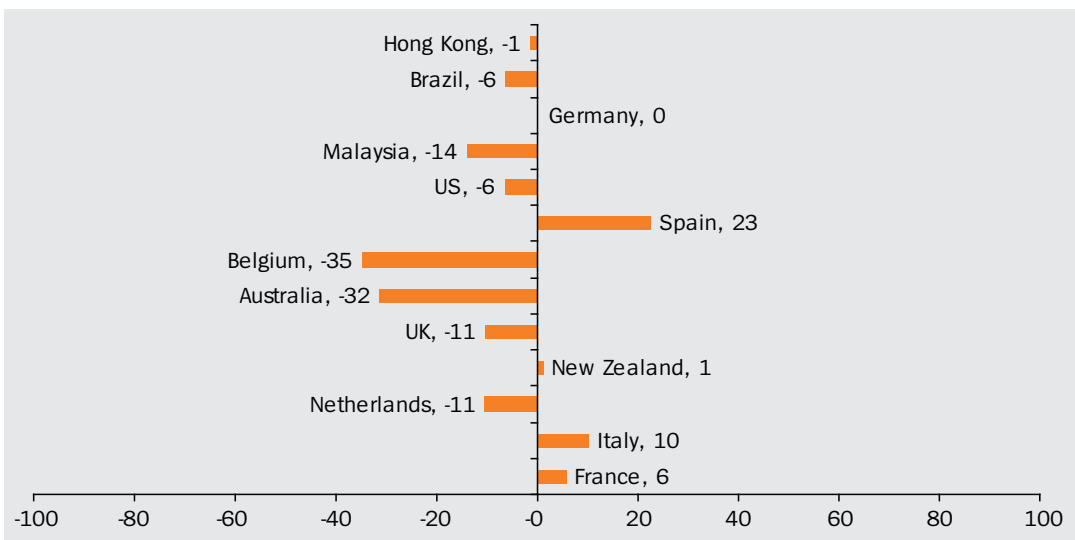


Chart 4: Change in Security Index from baseline to Wave 3 Security Index surveys (individual countries)

While people are still more concerned about identity theft and bankcard fraud than other threats by a large margin, these problems have become less threatening (Chart 5). By contrast, concern about national security has not changed very much since the baseline survey.

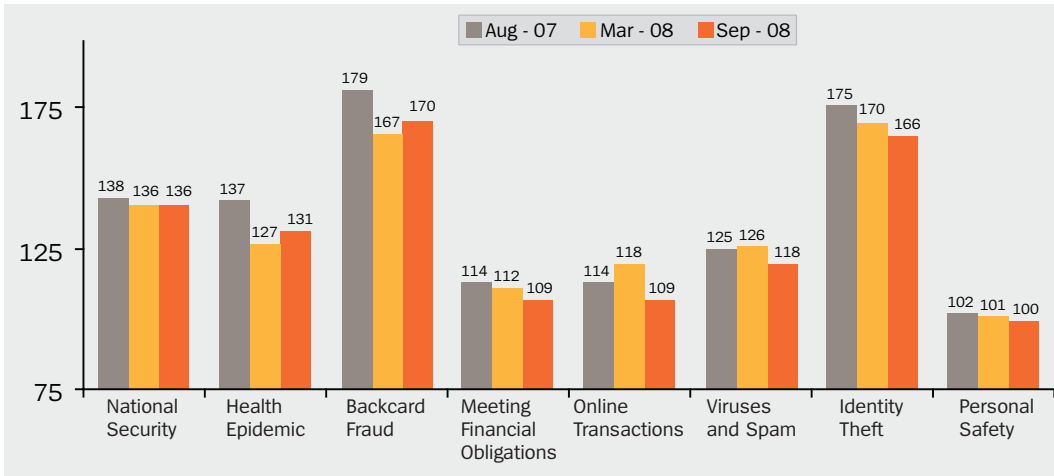


Chart 5: Comparison of findings from baseline and wave 3 Security Index surveys (13 countries)

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 Hong Kong worry most about financial security – by a large margin. Brazil, Germany, Malaysia, Spain and US are also instances of “serious concern” – i.e., indices over 150.

All of the remaining 7 countries are at “moderate” levels of concern (index values of 75-149). France and the Netherlands report the least concern, by a wide margin.

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 concern in virtually all of the countries where the Unisys Security Index is conducted. The index for bankcard fraud is 200 or more in three places: Hong Kong, Brazil and Germany (Chart 7).

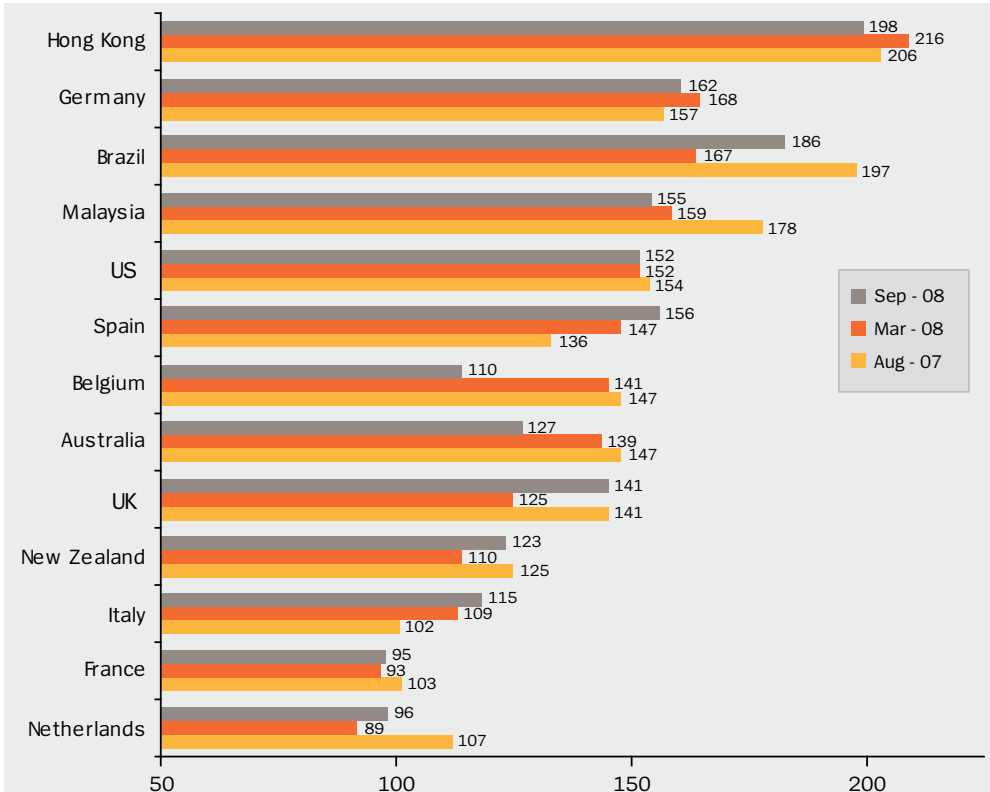


Chart 6: Financial Security Index, by country

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 six 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 they come from high- or low-income countries. Similarly, concern about meeting financial obligations does not correlate strongly with per capita income.

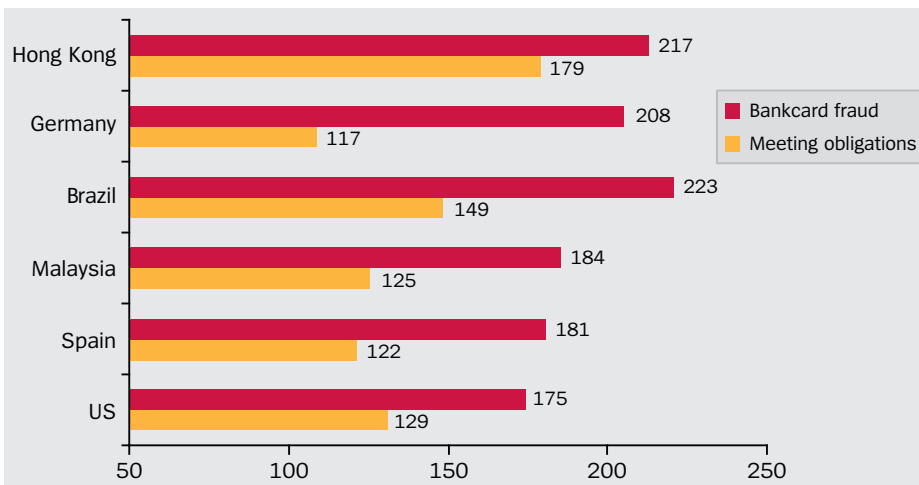


Chart 7: Indices for meeting financial obligations and bankcard fraud (countries with serious concern)

Countries with moderate concerns about financial security

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

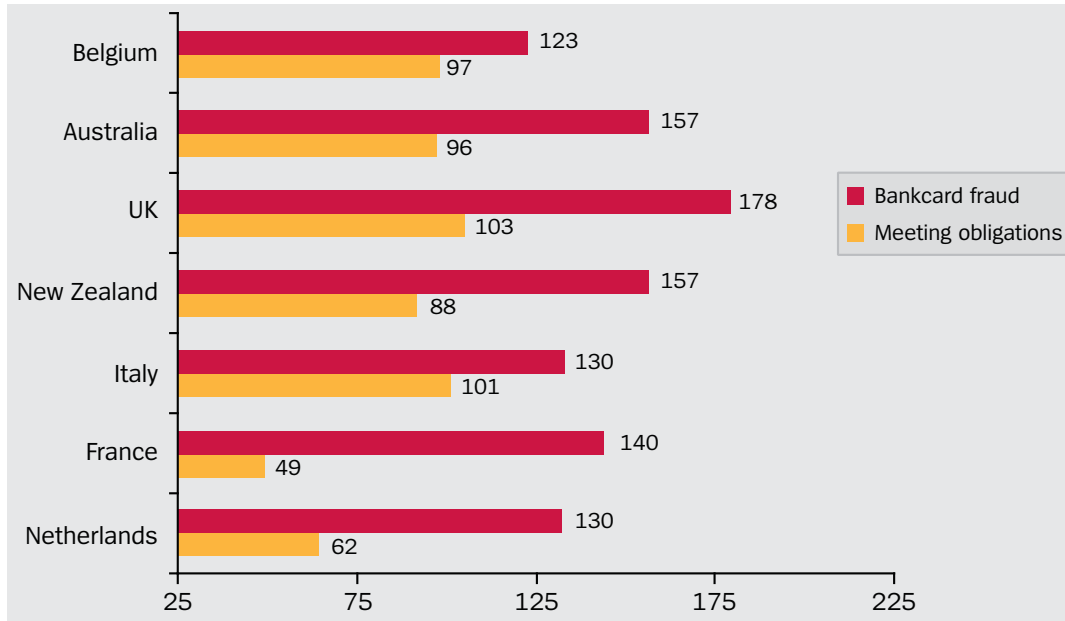


Chart 8: Indices for meeting financial obligations and bankcard fraud (countries tending toward moderate levels of concern)

Issue: National security

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

Seven of the remaining countries reflect “moderate” levels of concern (values of 75-149), while the Netherlands has an index of only 74.

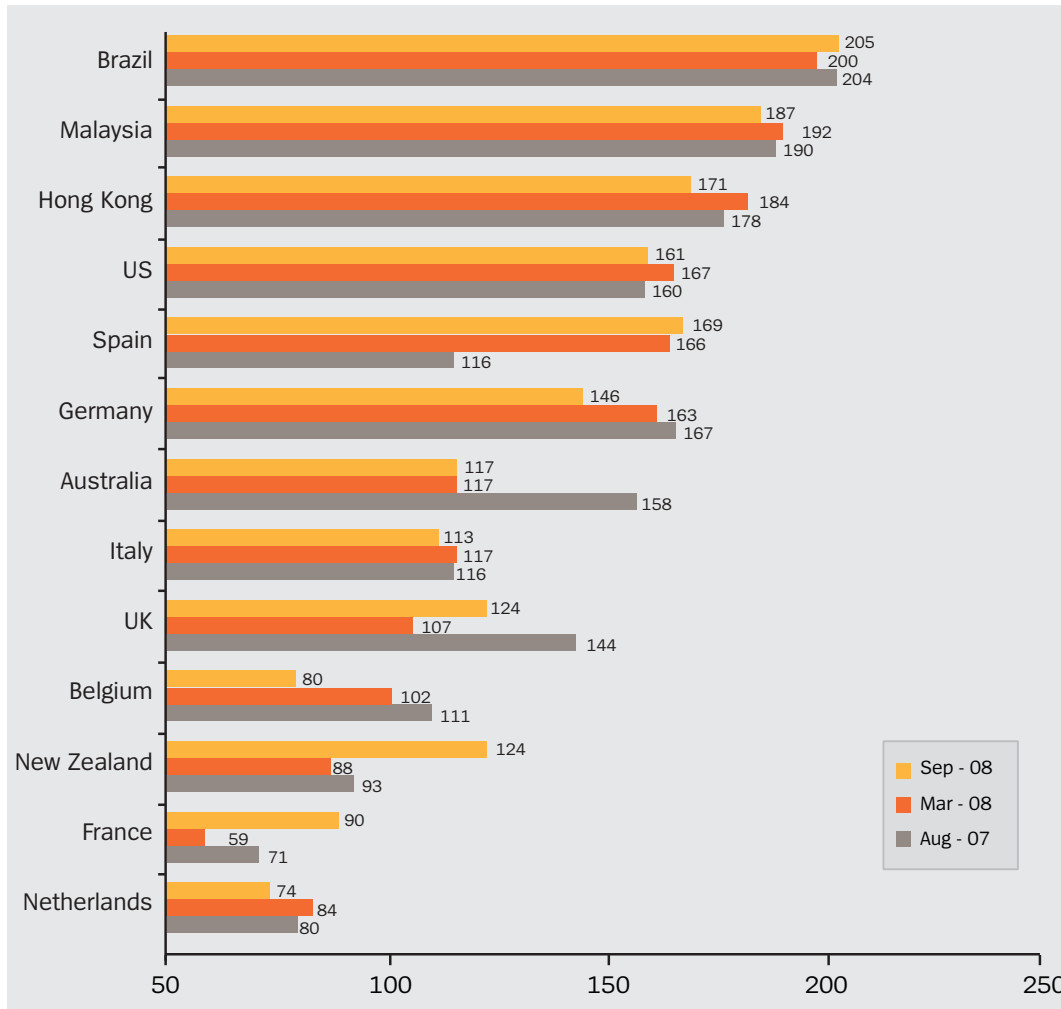


Chart 9: National Security Index by country

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.

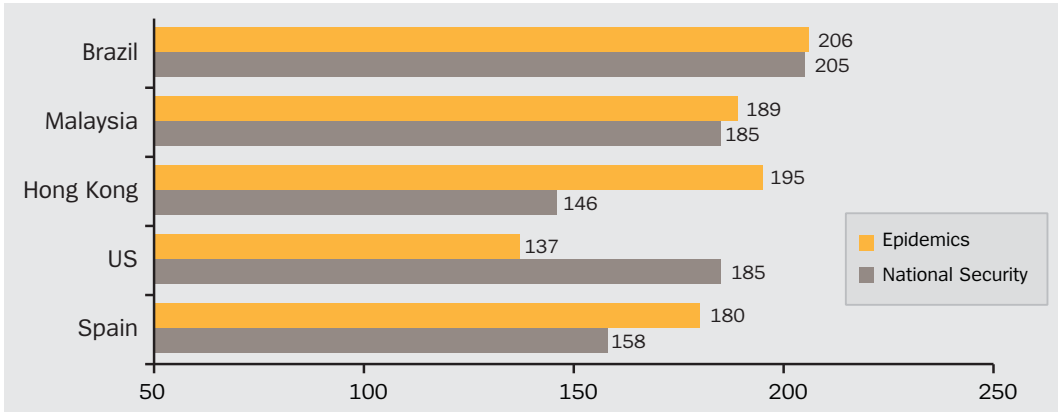


Chart 10: Indices for national security and epidemics (countries with serious concern about national security)

Countries with moderate concerns about national security

Five of the European and Pacific countries with moderate concern about national security worry more about national security than about epidemic, while three do not.

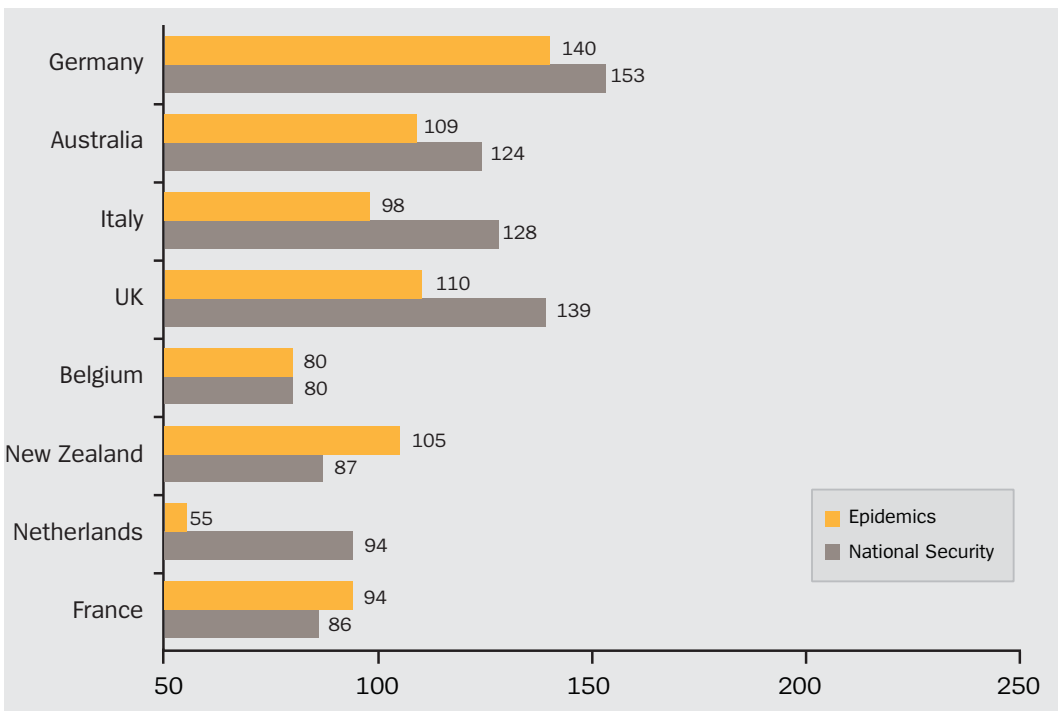


Chart 11: Indices for national security and epidemics (countries with moderate concern about national security)

Issue: Personal security

The Personal Security Index reflects concerns about (1) personal safety and (2) identity theft. Hong Kong, Malaysia, 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, French respondents are comparatively blasé about these threats.

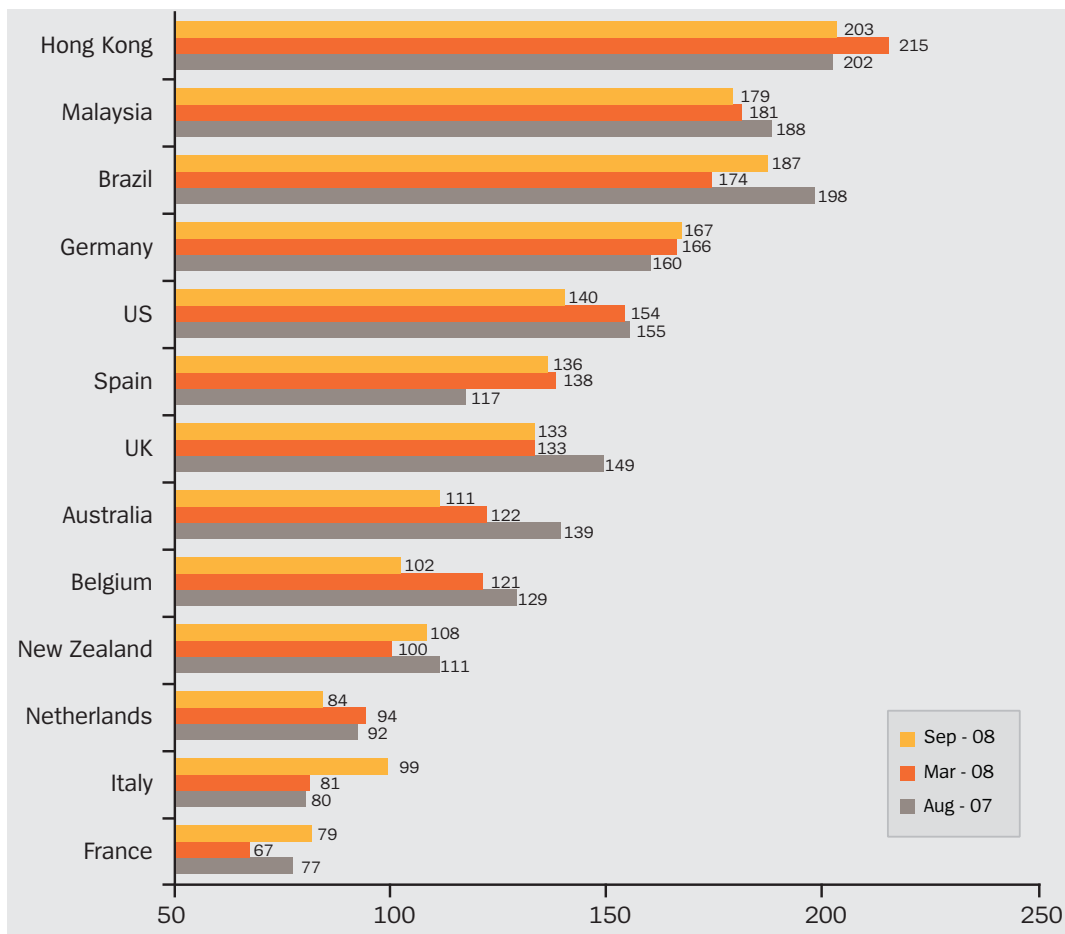


Chart 12: Personal Security Index by country

Countries with serious concerns about personal security

The following chart shows the indices for the individual questions on personal safety and identity theft. Respondents in Asia and Brazil have serious concern about both threats, while Germans worry mainly about identity theft.

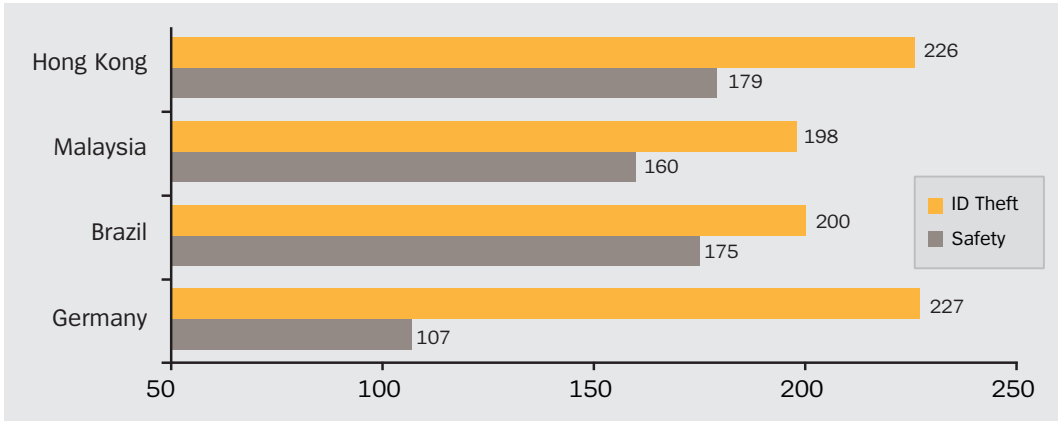


Chart 13: Indices for personal safety and identity theft (countries with serious levels of concern)

Countries with moderate concerns about personal security

The European and Pacific countries with moderate concern about personal security also worry much more about identity theft than personal safety – especially in the Netherlands and France, where the Personal Safety Index is less than 40.

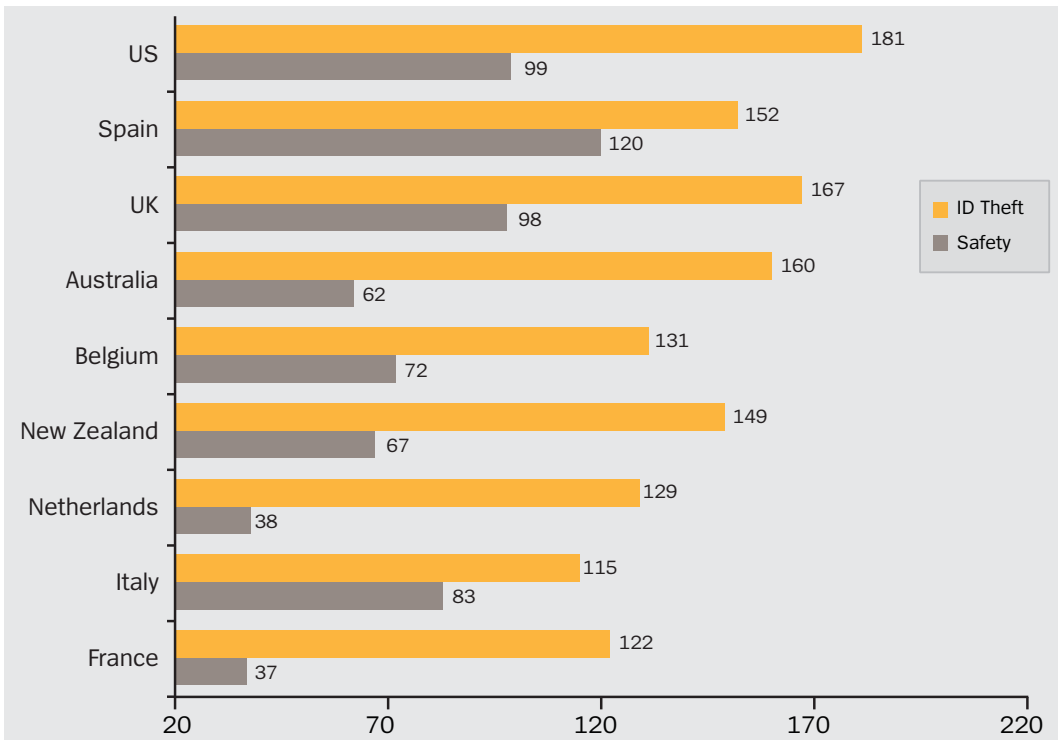


Chart 14: Indices for personal safety and identity theft (countries with moderate levels of concern)

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.

Asian, Pacific and most other European countries have “moderate” levels of concern (values of 75-149). Italy’s index is only 78.

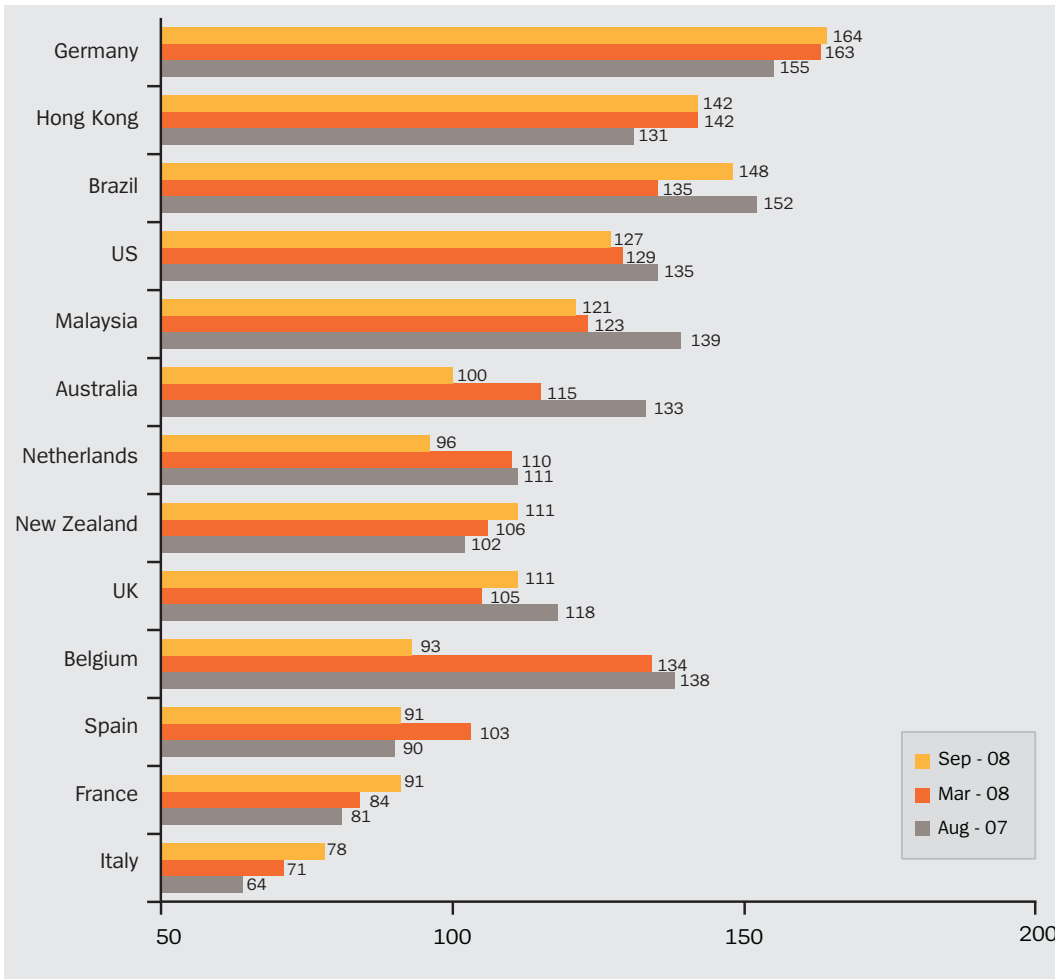


Chart 15 Internet Security Index by country

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 Italians, who worry the least.

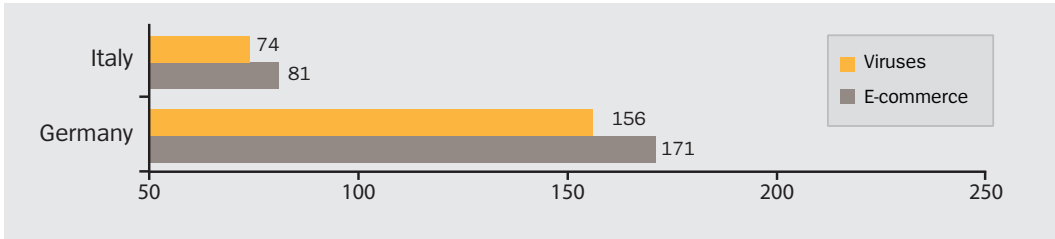


Chart 16: Indices for viruses and e-commerce (Germany and Italy)

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).

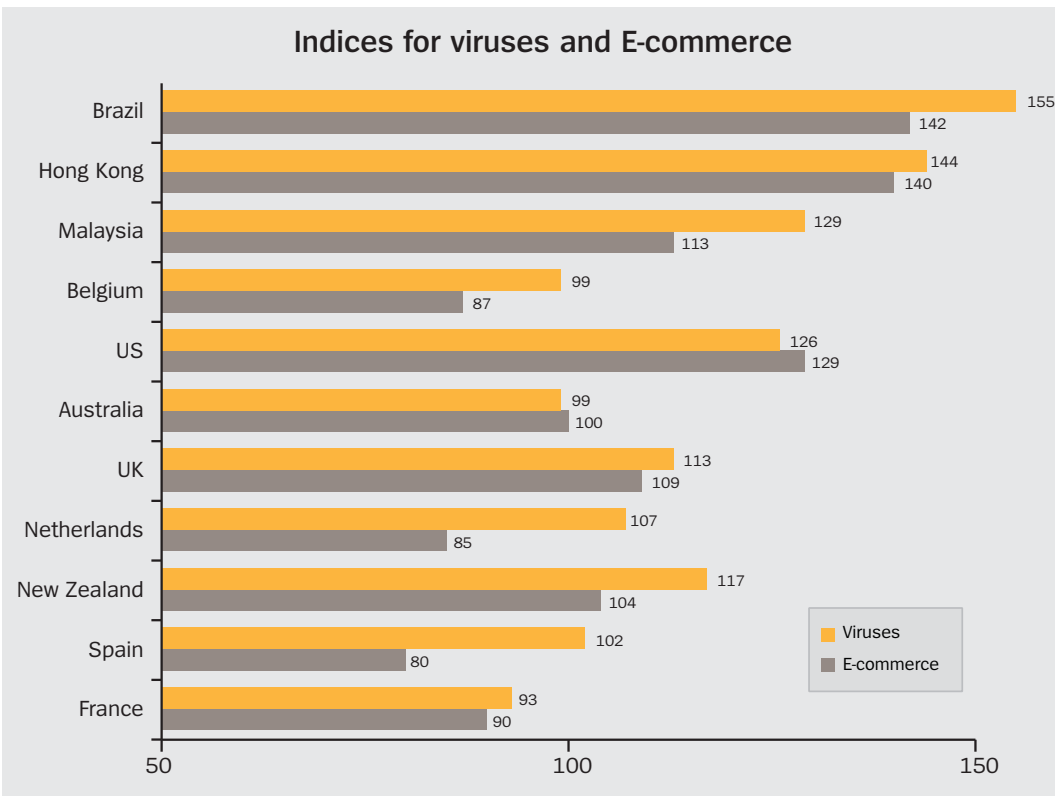


Chart 17: Indices for concern with online transactions and viruses / spam (countries with moderate levels of concern)

About Unisys

Unisys is a worldwide information technology services and solutions company. We provide consulting, systems integration, outsourcing and infrastructure services, combined with powerful enterprise server technology. We specialize in helping clients use information to create efficient, secure business operations that allow them to achieve their business goals. Our consultants and industry experts work with clients to understand their business challenges and create greater visibility into critical linkages throughout their operations. For more information, visit www.unisys.com.

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Lieberman Research is the only U.S. 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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