



UNISYS Security Index: Global Summary

13 April 2010 (1H '10)

Lieberman Research Group

Introduction

The Unisys Security Index™ is a global research endeavour that provides insights into the attitudes of consumers on a wide range of issues in ten 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, 1H '10, also gauges whether consumers are willing to sacrifice some privacy in return for enhanced personal security and convenience when they travel by air.

Security indices are based on surveys in each of the ten countries where the Index is developed. The total number of consumers surveyed for 1H '10 is 9,429.

- Australia (n=1,200)
- Belgium (n=755)
- Brazil (n=1,500)
- Germany (n=960)
- Mexico (n=1,031)
- Netherlands (n=500)
- New Zealand (n=532)
- Spain (n=970)
- UK (n=977)
- US (n=1,004)

Unisys strives to provide a secure environment for the technology products and services it provides to governments and major industries. The Unisys commitment to public and fiscal safety and security are the primary reasons for the creation of this index to monitor progress in these areas in order to contribute to the public debate.

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. The 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 ten countries surveyed is 128, representing a moderate level of concern. There is substantial variation in the index between countries surveyed – from serious levels of concern in Brazil and Mexico to quite low levels of concern in the Netherlands.

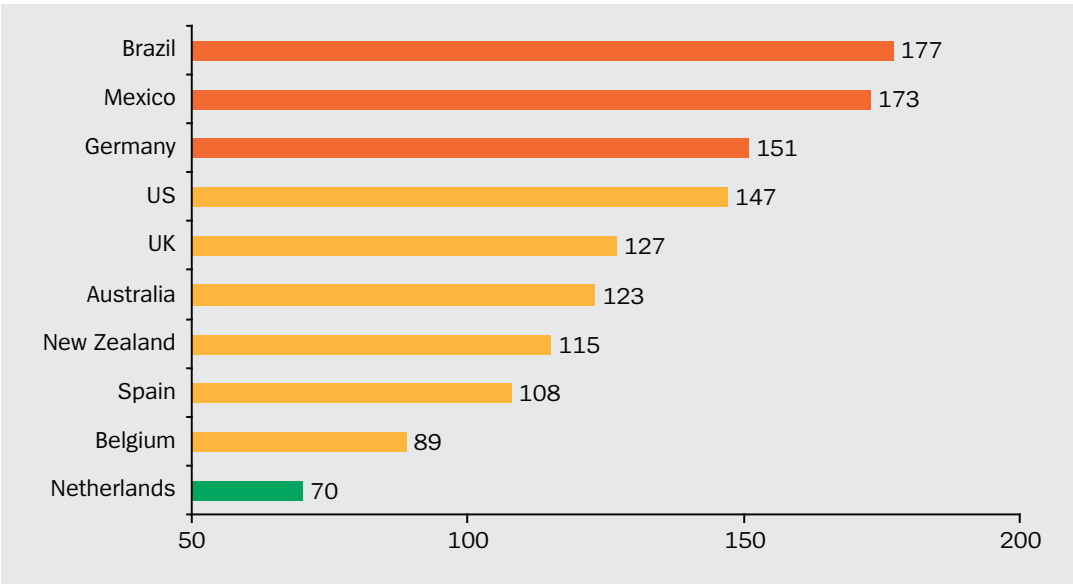
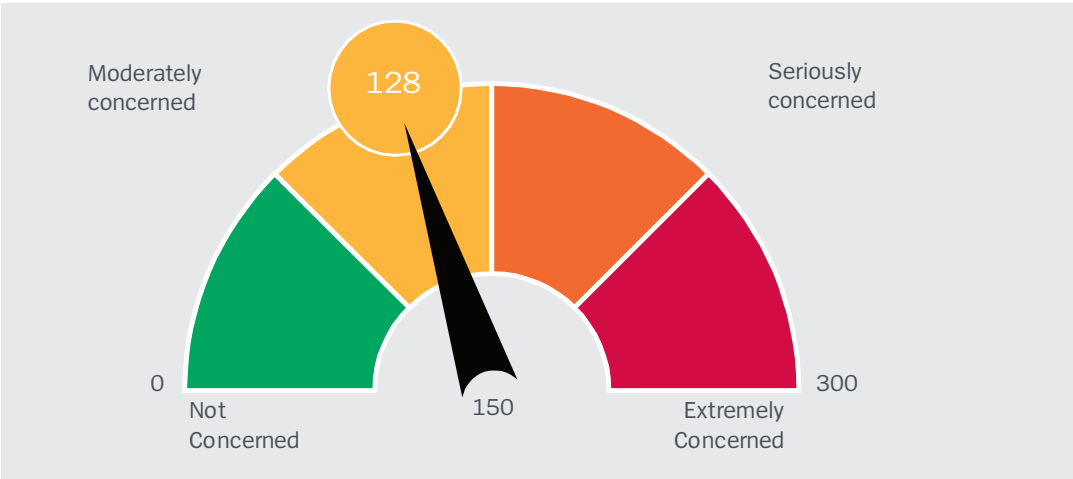


Chart 1: Security Index for each country in the 1H '10 survey

Concern about security is highest in:

- Brazil
- Mexico
- Germany
- US

Concern about security is lowest in

- The Netherlands
- Belgium

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

Residents of Mexico and Brazil rank at or near the highest level of concern in all four areas, particularly 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 concern sets the Netherlands and Belgium 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 be concerned 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 9,429 completed interviews with persons aged 18 and up. Interviews were conducted by telephone except in Belgium and Spain, where they were conducted face-to-face, and in the Netherlands where the survey was conducted online. The details of this program are as follows:

- All national surveys conducted in February 2010
- In all countries except Brazil and Mexico (where the urban areas included in the sample universe represent a large fraction of the population), the sample is weighted with respect to national 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 ten 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, Australia and New Zealand, 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

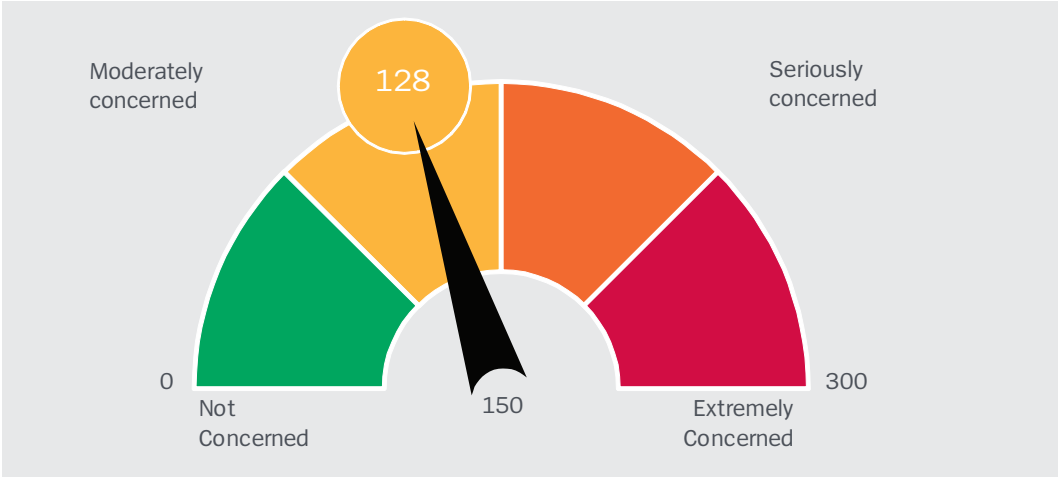
The Personal Security index is derived from the following questions:

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 1H ‘10, respondents in all markets are asked about their willingness to sacrifice some privacy in return for enhanced personal security and convenience when they travel by air.

The Unisys Security Index

The Unisys Security Index of 128 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 threats provoke the most concern.



Top-Ranked Concerns Across All Countries

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

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

National security is the top threat in two countries and the third-ranked threat in three more.

Health epidemic, viruses and spam are never top-ranked threats but are among the top four threats in about half of countries.

Online transactions do not appear among the top three threats, but are the fourth ranked concern in three countries.

Ability to meet financial obligations, despite the severity of the worldwide financial crisis, is not now among the top three concerns in any of the countries surveyed.

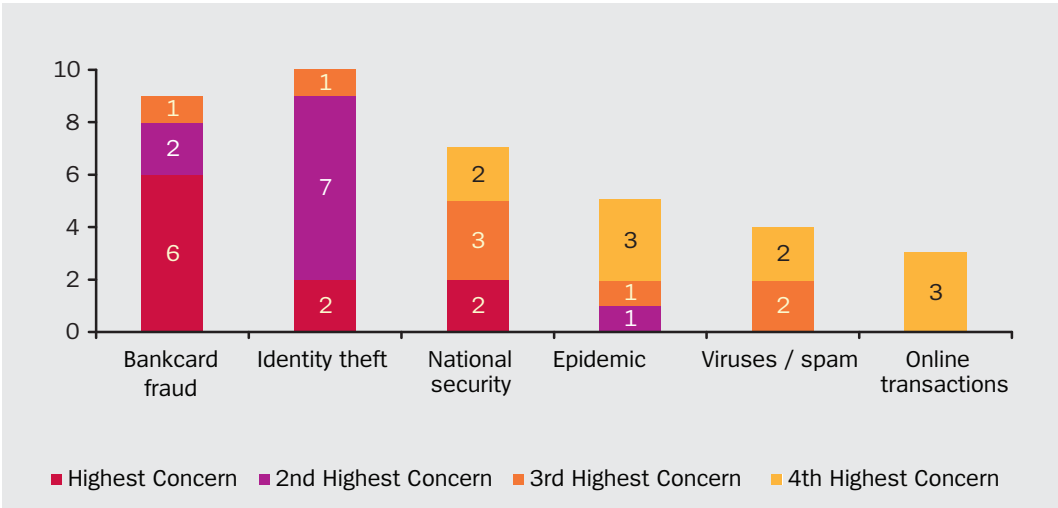


Chart 2: Number of countries where most worrisome threats are highest concern, second highest concern or third highest concern

Trends

Since the 2H '09 survey, the Unisys Security Index has increased by 9 points, to 128. This increase has been fueled by increases in all four of the four underlying indices, particularly the Personal Security Index.

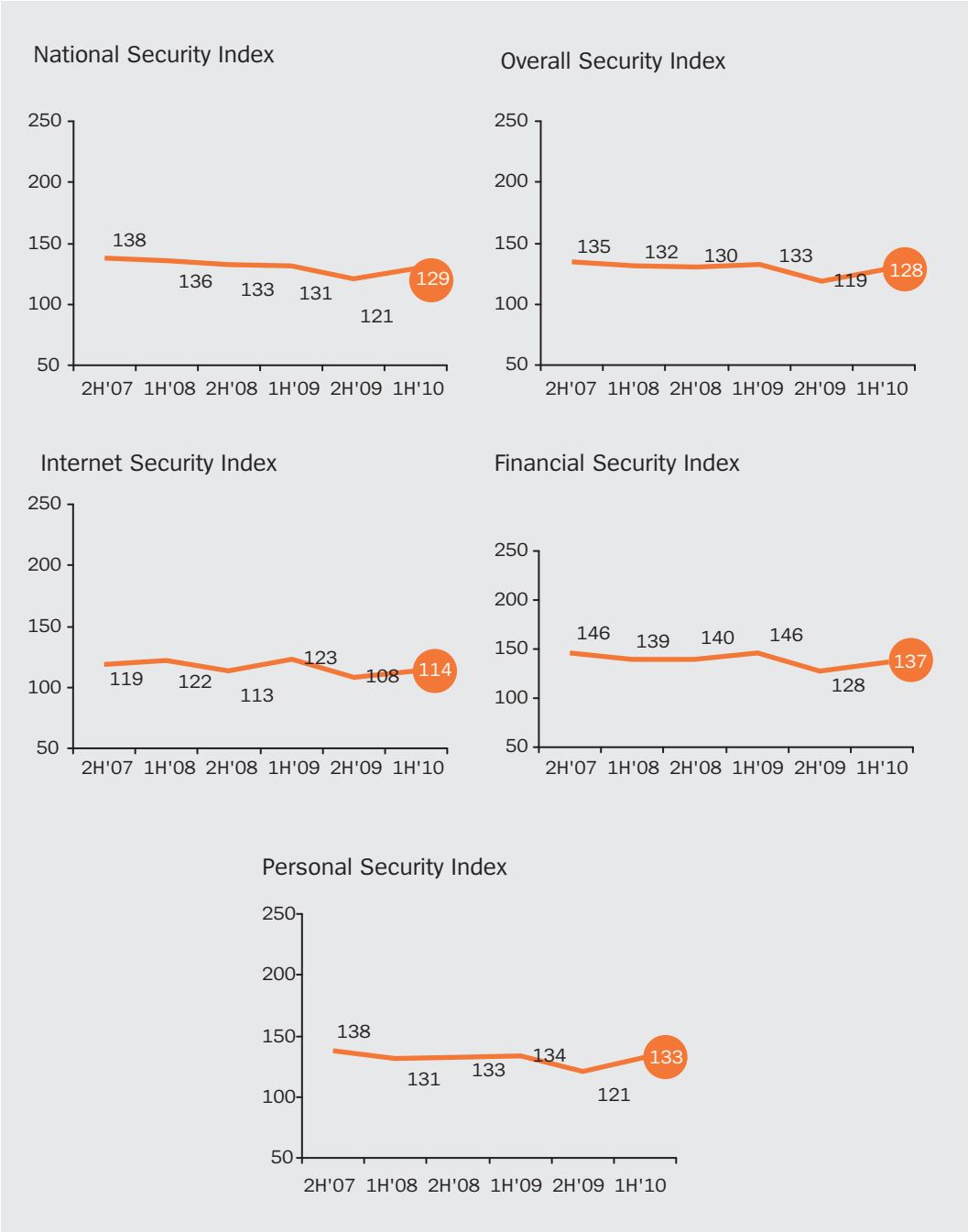


Chart 3: Security Index trends

TRENDS (9 COUNTRIES IN 2H '09)

Mexico was added to the Security Index for the first time in 1H '10. Compared with the 9 countries included in the 2H '09 survey, Mexico is not “average” – levels of concern are on the high side. This page displays the trend when only the 9 countries included in 2H '09 are profiled.

Even without Mexico, the Unisys Security Index goes up, albeit more gradually. The Overall Security Index rises by 4 points.

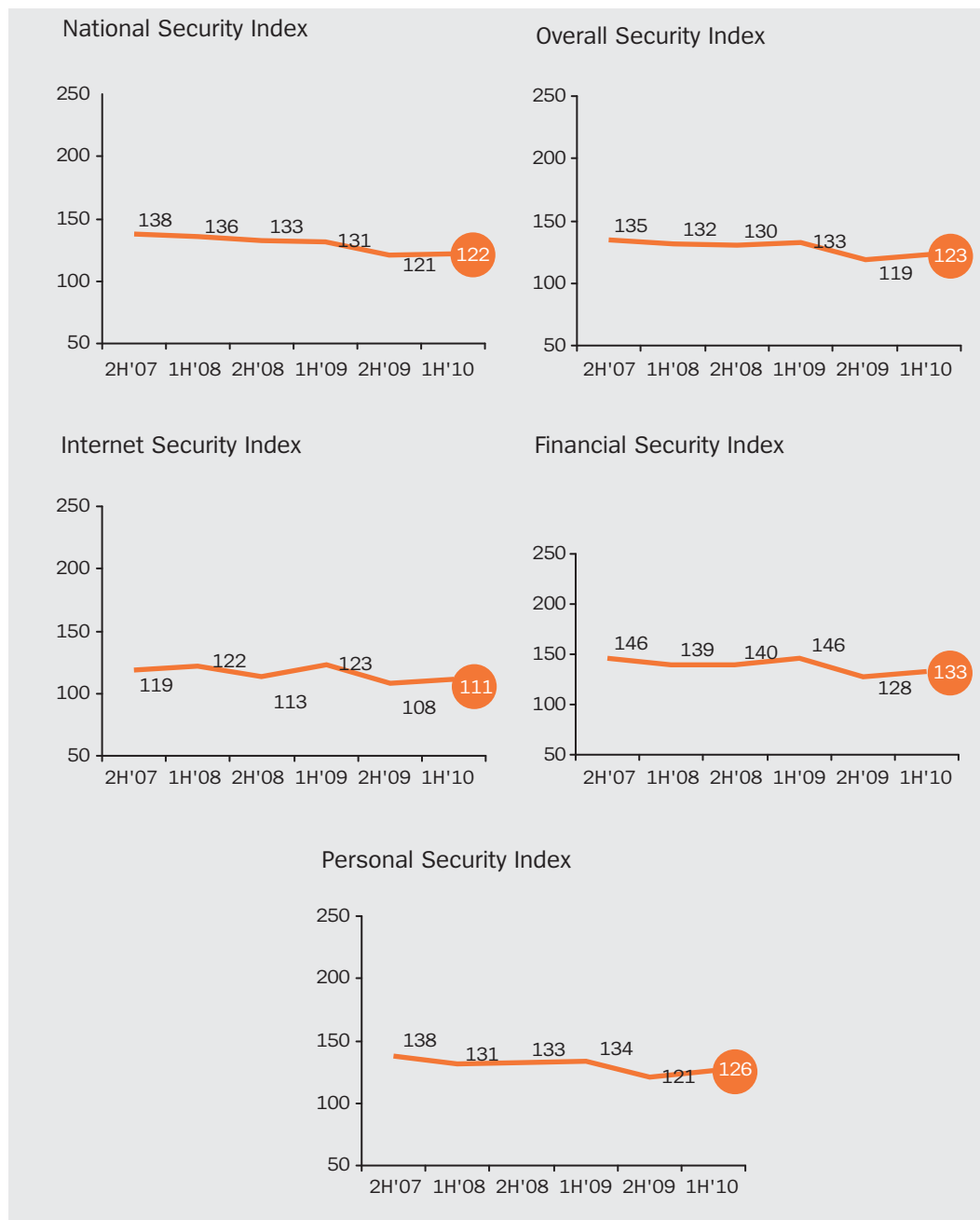


Chart 3A: Security Index trends (Mexico excluded)

Since the 2H '09 survey, the Unisys Security Index has increased in most countries, except for Spain (where the Index decreased) and Australia and the US (which are unchanged).

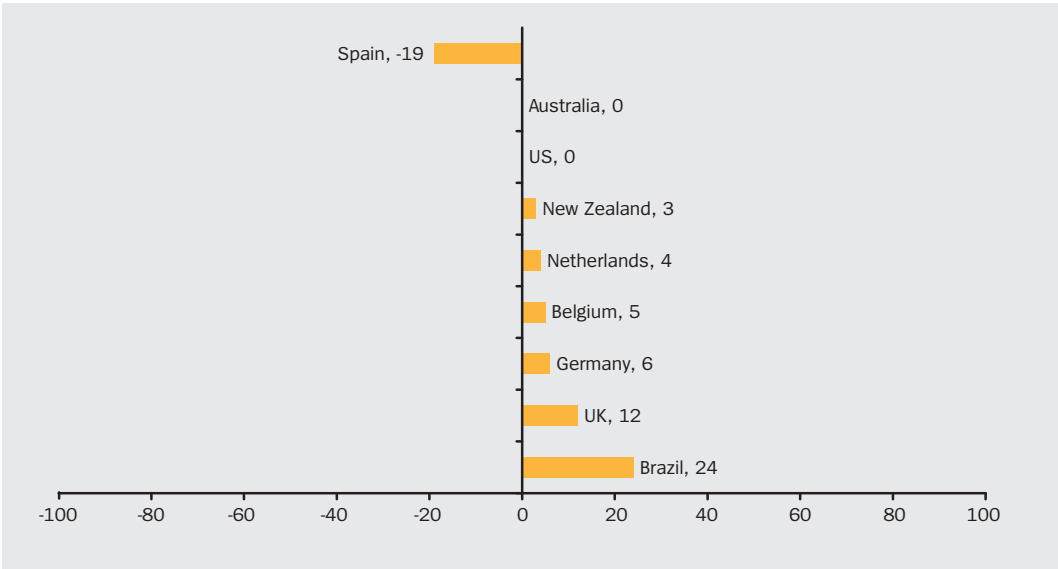


Chart 4: Change in Security Index from 2H '09 to 1H '10 Security Index surveys (individual countries)

By a large margin, people are consistently more concerned about identity theft and bankcard fraud than about other threats (Chart 5). Since 2H '09 the level of concern about these threats has increased. In fact, the indices for all eight threats have increased (although concern over epidemics has only gone up by one point.).

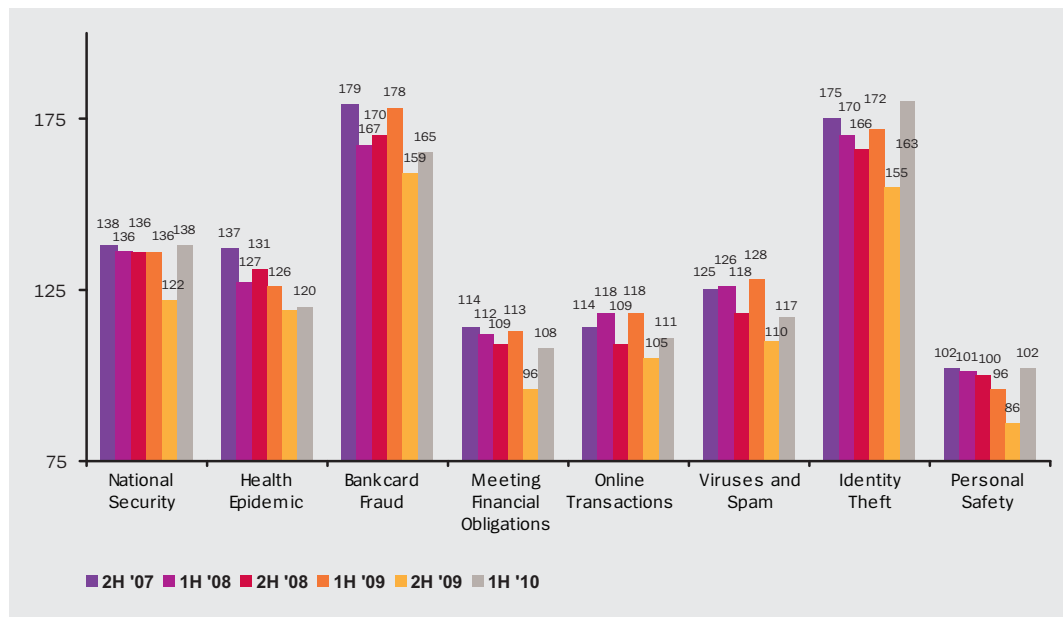


Chart 5: Comparison of findings from the six Security Index surveys (ten countries)

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 Brazil, Mexico, Germany and the US are most concerned about financial security (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).

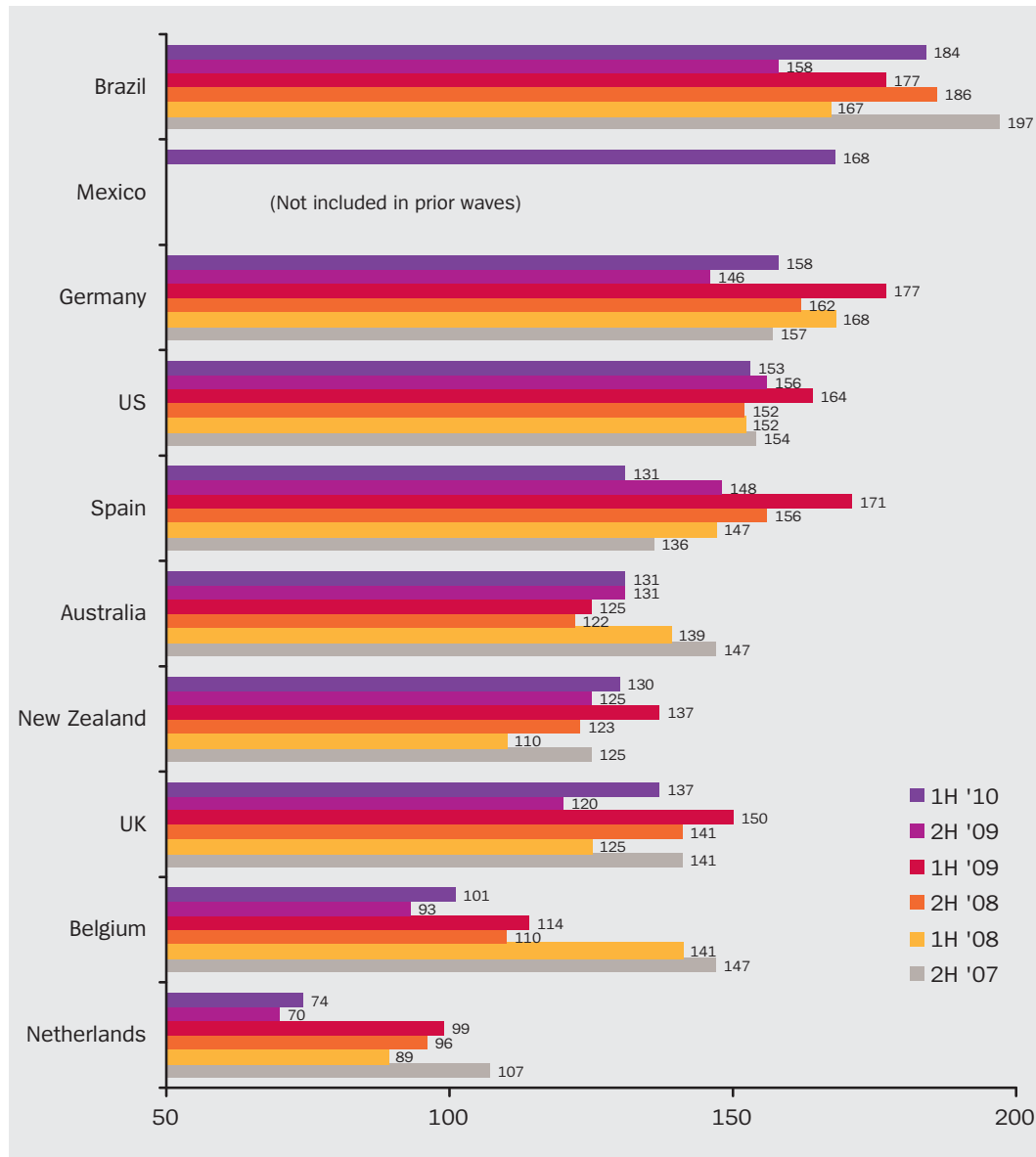


Chart 6: Financial Security Index, by country

Countries with Serious Concerns About Financial Security

Chart 7 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 concern.

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

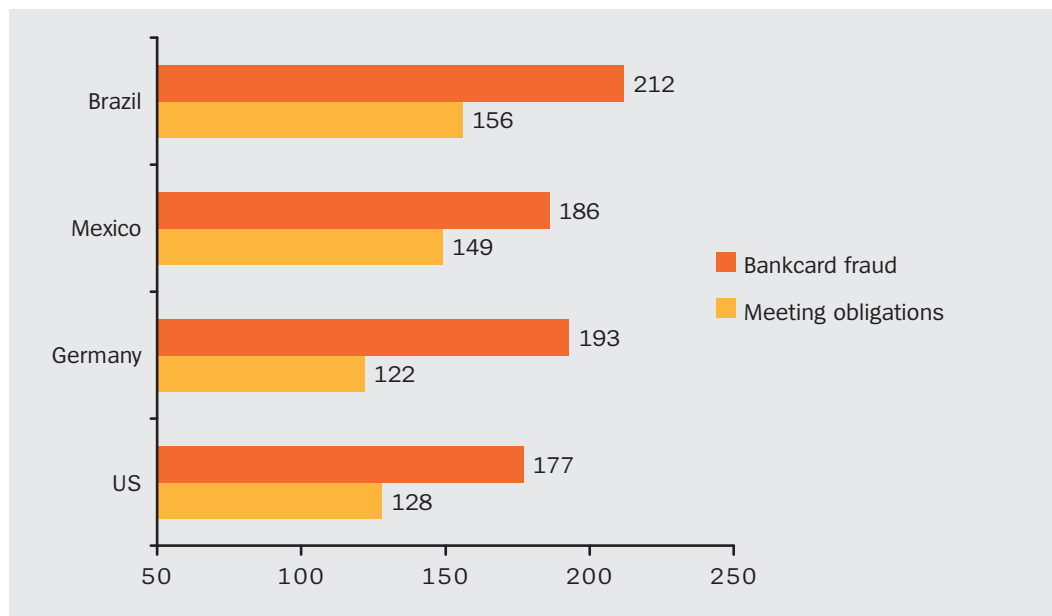


Chart 7: Indices for meeting financial obligations and bankcard fraud (countries with serious concern)

Countries with Moderate Concerns About Financial Security

The six countries with the lowest levels of concern about financial security are shown in Chart 8. 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.

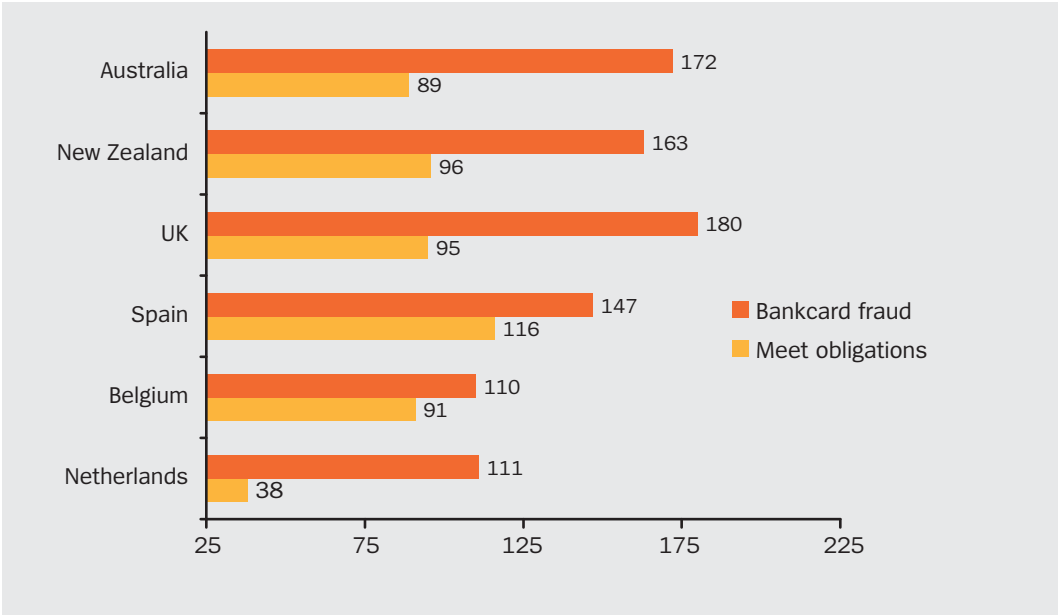


Chart 8: Indices for meeting financial obligations and bankcard fraud (countries tending toward moderate levels of concern)

Issue: National security

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

Five of the remaining countries reflect “moderate” levels of concern (values of 107-131), while Belgium is at 72 and the Netherlands has an index of only 58.

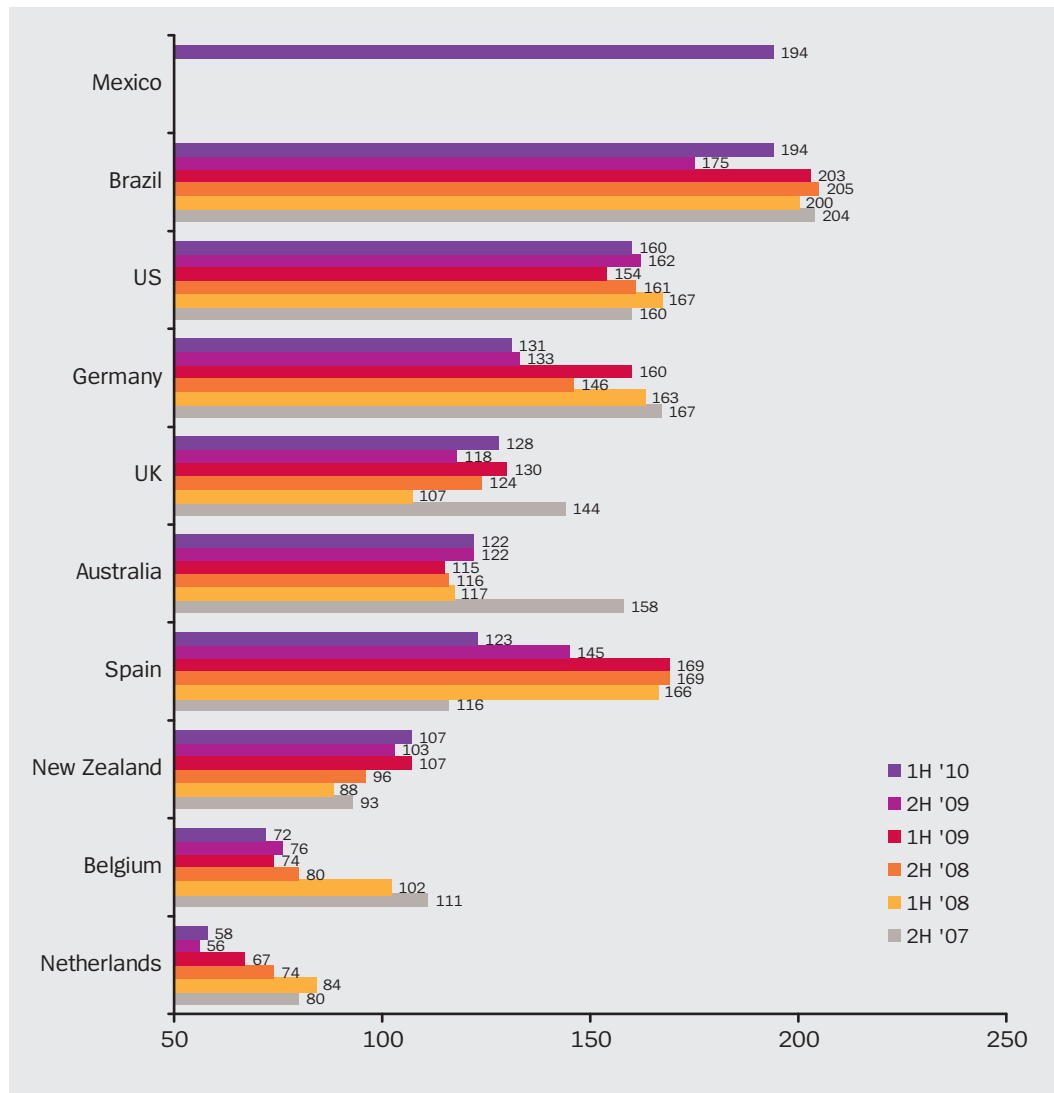


Chart 9: National Security Index by country

Countries with Serious Concerns About National Security

Chart 10 shows the indices for the individual questions on national security and epidemics for countries with the greatest concern about national security. Americans are less concerned about epidemics than about national security related to war or terrorism. Conversely, Brazilian and Mexican adults are marginally more concerned about epidemics.

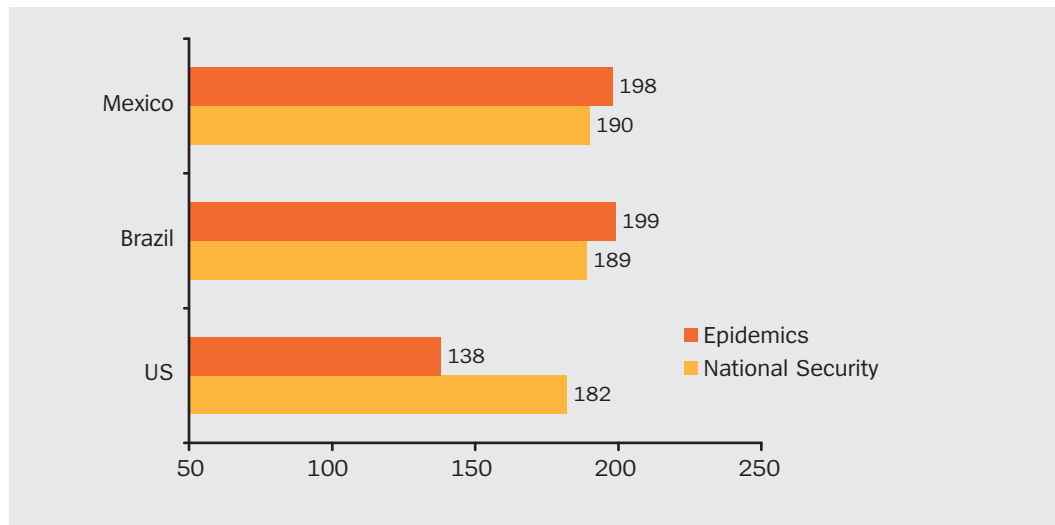


Chart 10: Indices for national security and epidemics (countries with serious concern about national security)

Countries with Moderate Concerns About National Security

Netherlanders are unusually relaxed about epidemics, compared to residents of other countries. Respondents in most other countries also report themselves less concerned about epidemics than about national security, except for New Zealand.

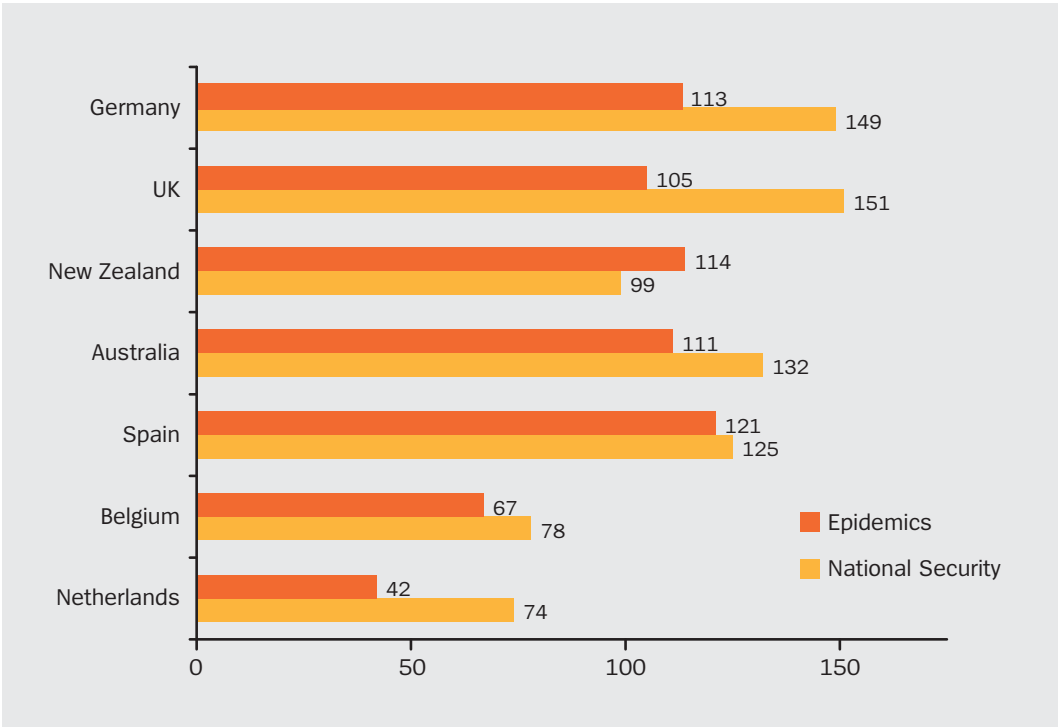


Chart 11: Indices for national security and epidemics (countries with moderate concern about national security)

Issue: Personal security

The Personal Security Index reflects concerns about (1) personal safety and (2) identity theft. Mexico, Brazil and Germany fall in the “serious concern” segment – i.e., a value over 150 (Chart 12).

The remaining countries have “moderate” levels of concern (values of 70-143). Again, Dutch respondents are the least concerned about personal security.

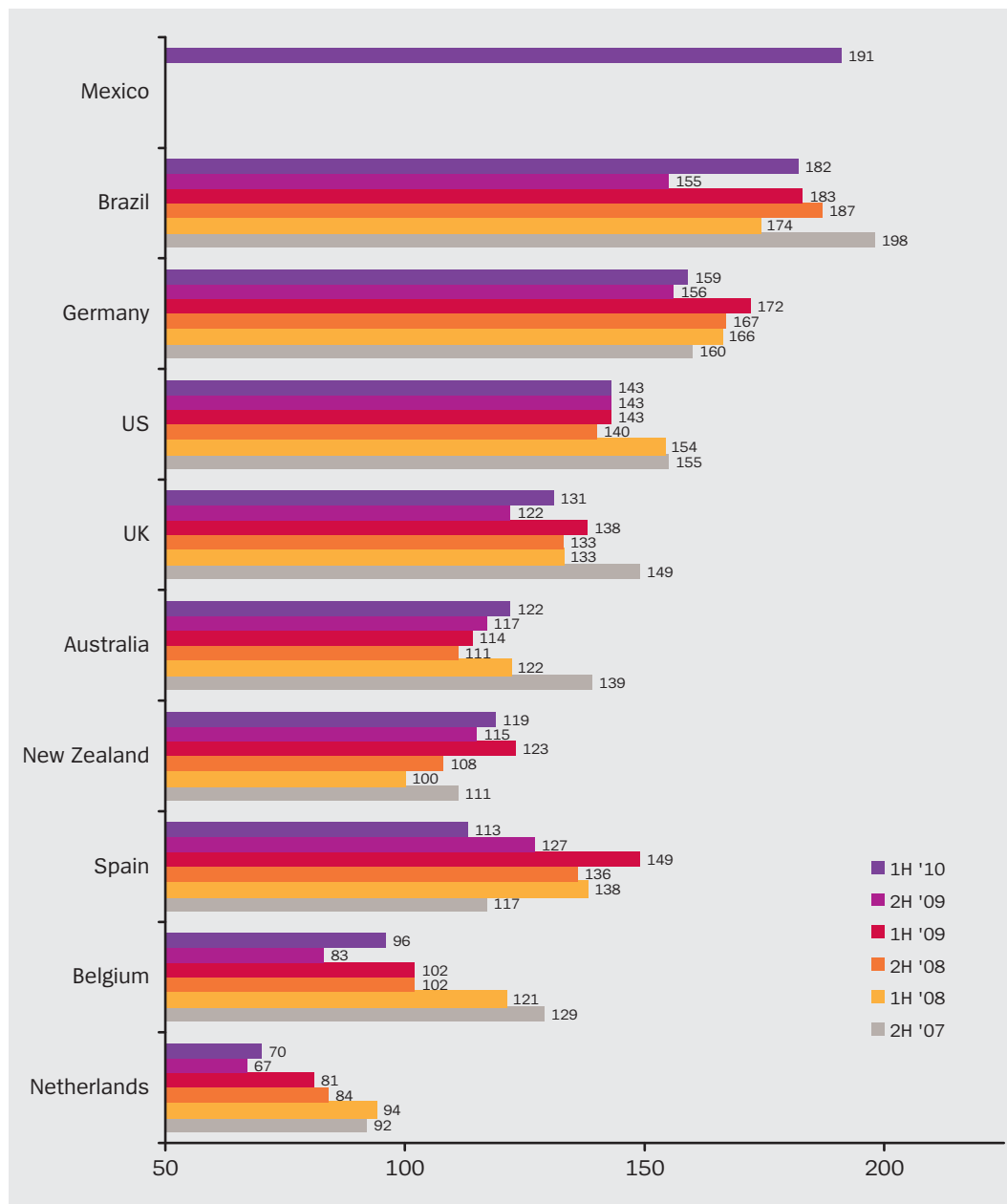


Chart 12: Personal Security Index by country

Countries with Serious Concerns About Personal Security

The following chart shows the indices for the individual questions on personal safety and identity theft. Germans are particularly concerned about identity theft.

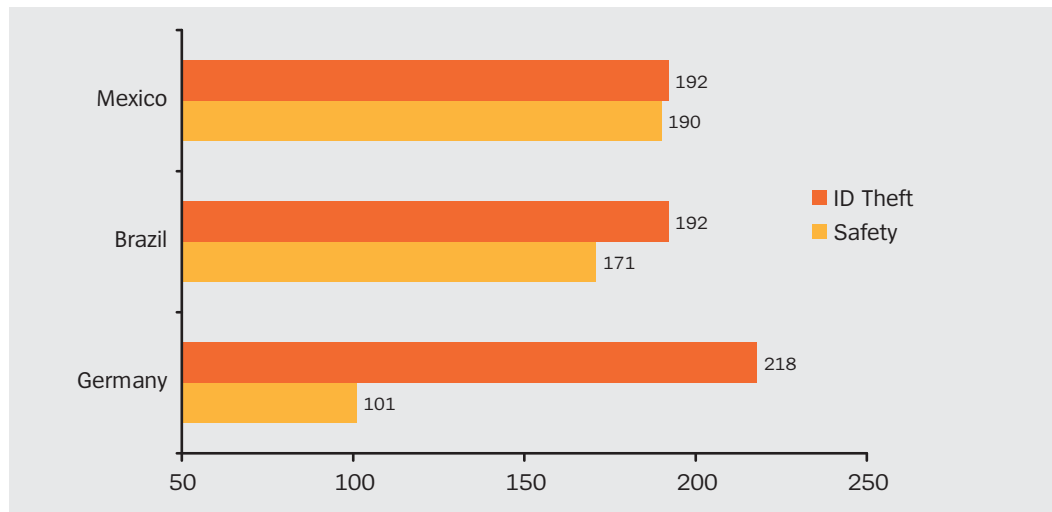


Chart 13: Indices for personal safety and identity theft (countries with serious levels of concern)

Countries with Moderate Concerns About Personal Security

The seven countries with moderate concern about personal security are much more concerned about identity theft than personal safety – especially in the Netherlands, where the Personal Safety Index is only 33.

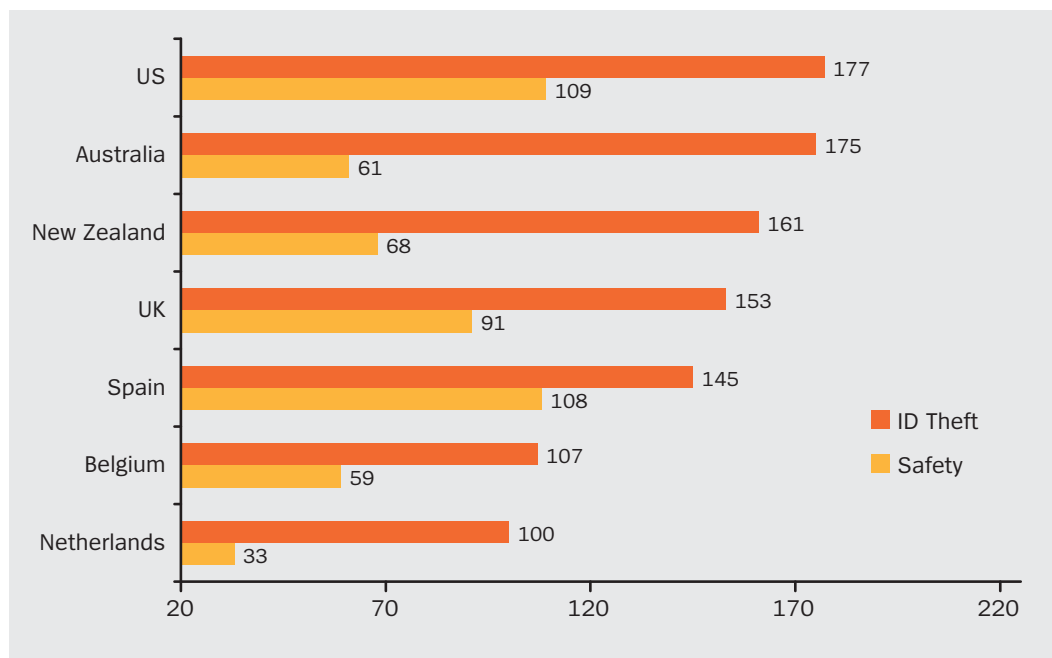


Chart 14: Indices for personal safety and identity theft (countries with moderate levels of concern)

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. Germany records the highest level of concern (156).

The remaining countries have moderate levels of concern.

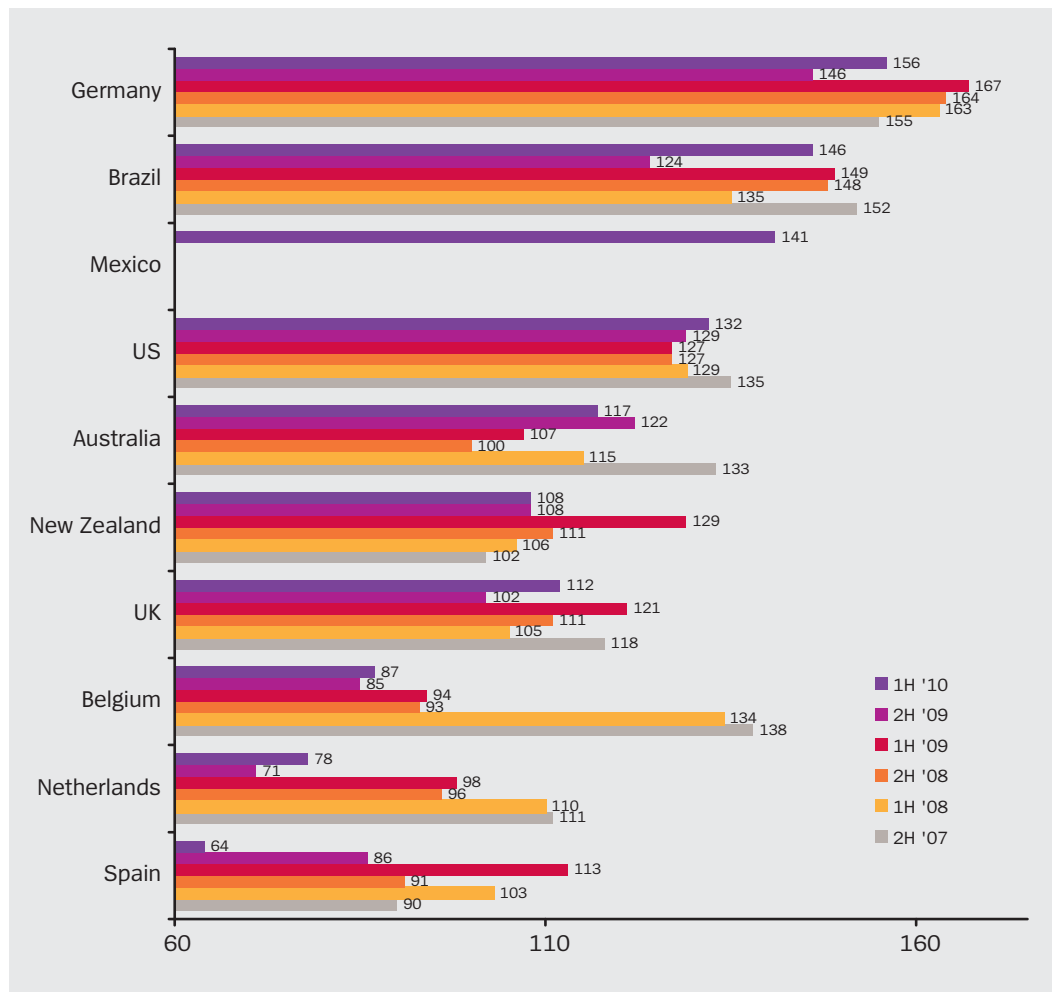


Chart 15: Internet Security Index by country

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 are most concerned about these threats, are compared with Spaniards, who are the least concerned.

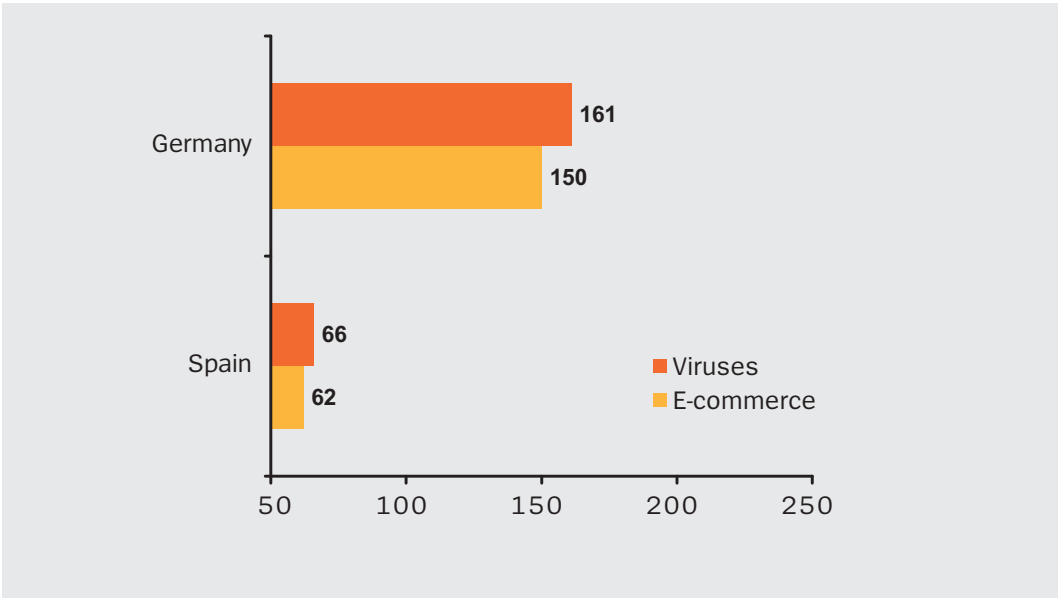


Chart 16: Indices for viruses and e-commerce (Germany and the Netherlands)

Countries with Moderate Concerns About Internet Security

In the UK, respondents are more concerned about the safety of online transactions, while Mexicans and Brazilians are more concerned about viruses and spam. In other countries, there is little difference in the levels of concern on these two issues (Chart 17).

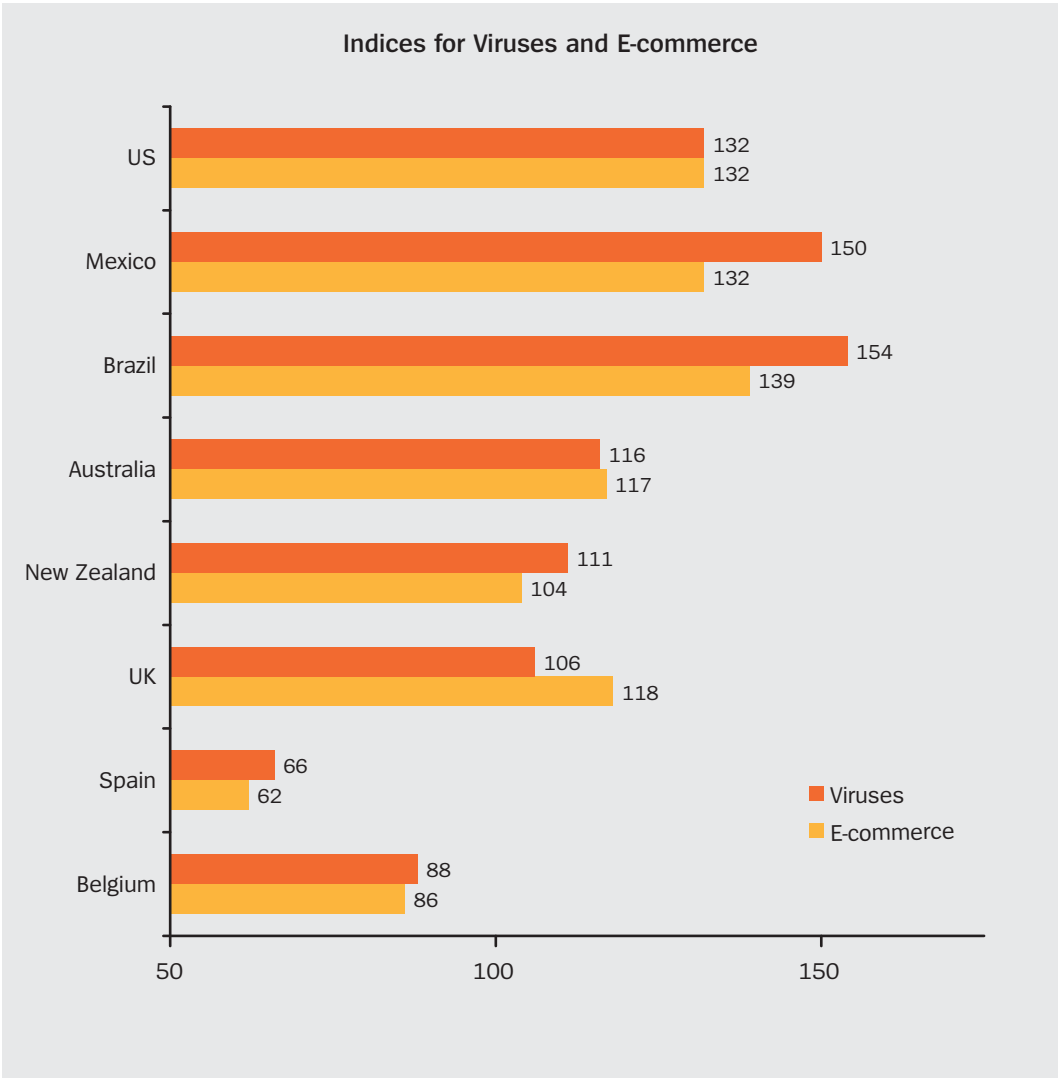


Chart 17: Indices for concern with online transactions and viruses / spam (countries with moderate levels of concern)

Supplemental Questions

Issue: Which of the Following Statements Describe your Willingness to Sacrifice Some Privacy for Enhanced Personal Security and Convenience When you Travel by Air?

A large majority of air travelers are willing to submit to:

- Full electronic body scans at the airport
- Identity checks using biometric data such as iris scans or fingerprints
- Provide personal data in advance such as a driver's license or passport

For all countries except for Mexico, the proportion willing to submit to one or more of these security screening methods is in the 87-100% range. For Mexico, the proportion is 75%.

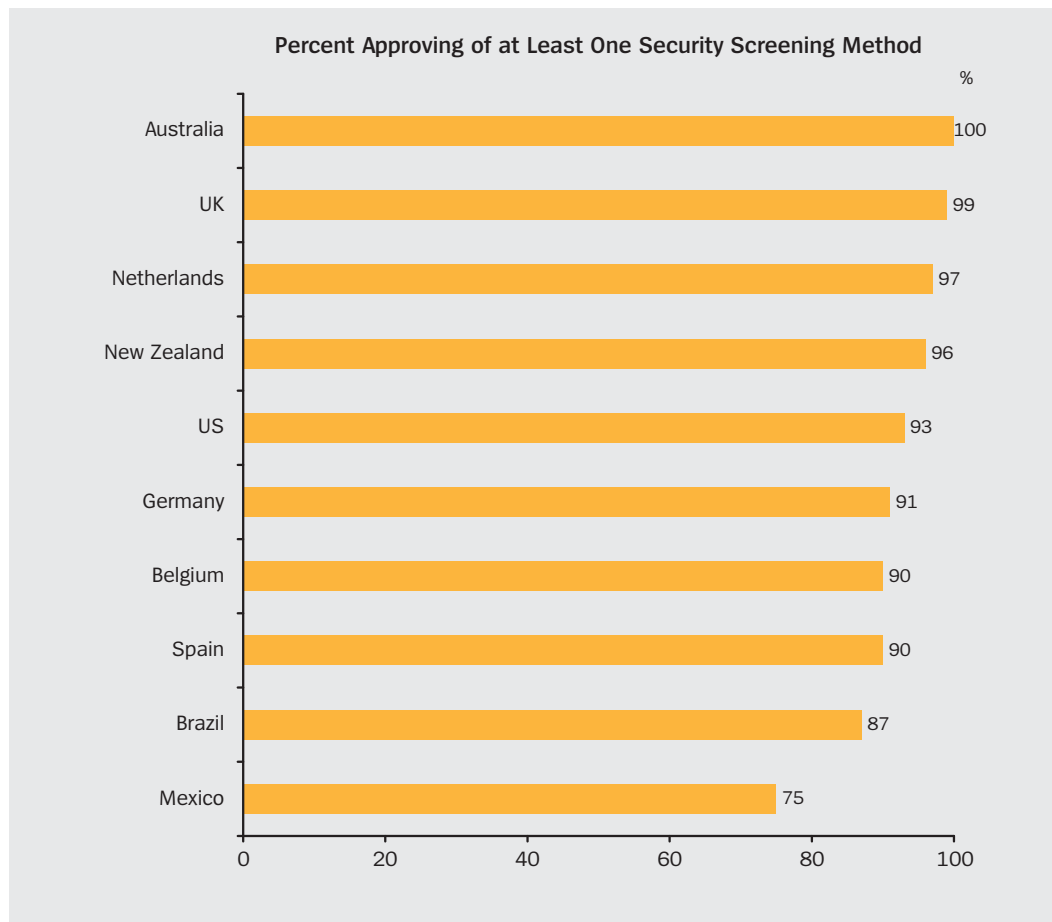


Chart 18: Percent of air travelers willing to accept one or more security screening methods
(Base = respondents who travel by air)

Air travelers do not consistently favor any individual screening method. Overall, they are most willing to provide personal data in advance, but this is not the preferred method in all countries. Except for Mexican travelers, who consistently react negatively to the idea of screening, a majority of air travelers is willing to submit to any individual screening method.

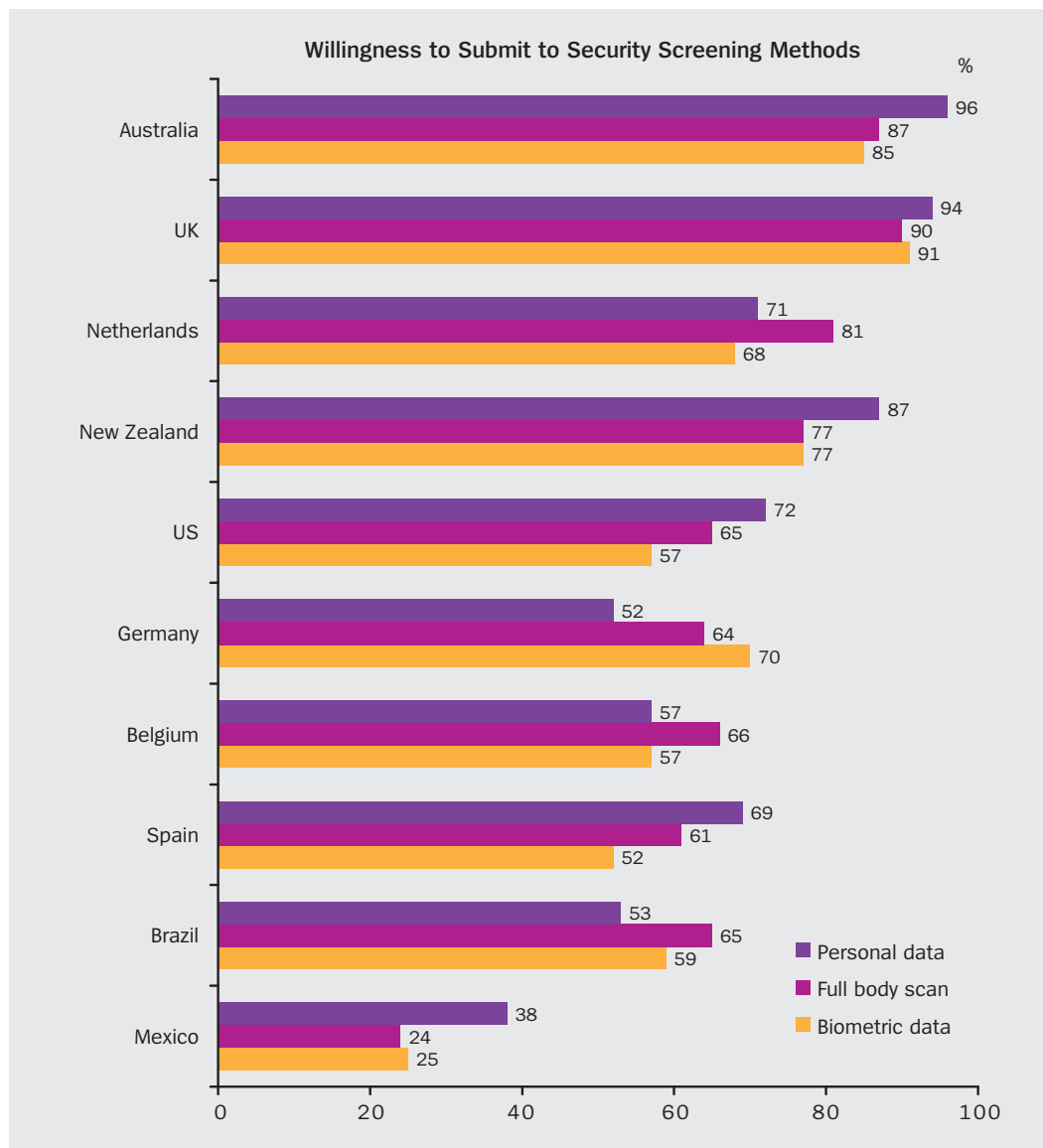


Chart 19: Percent of air travelers willing to submit to screening methods
(base = respondents who travel by air)

About the Unisys Security Index

The Unisys Security Index is a bi-annual global study that provides insights into the attitudes of consumers on a wide range of security related issues. Lieberman Research Group conducted the survey in Brazil, Mexico, Europe and the U.S.; Newspoll conducted the research in Asia-Pacific.

The Unisys Security Index surveys more than 9,400 people in ten countries: Australia, Belgium, Brazil, Germany, Mexico, the Netherlands, New Zealand, Spain, the United Kingdom and the United States. The study measures consumer perceptions on a scale of zero to 300, with 300 representing the highest level of perceived concern. For more information, visit www.unisyssecurityindex.com.

About Unisys

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About Lieberman Research Group

Lieberman Research Group is a top-ranked and nationally recognized market research organization serving the business-to-business and consumer markets. Founded in 1966, it is now a \$30 million custom research company. Interviewing facilities in Manhattan and Brooklyn have the capability to conduct interviews in 20+ languages.

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.

Through its research in the US and worldwide, Lieberman Research provides custom research and information analysis to its clients on a wide range of issues including customer and employee satisfaction, loyalty, multicultural and ethnic marketing, new product development, public policy, advertising, public relations and many others.

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