



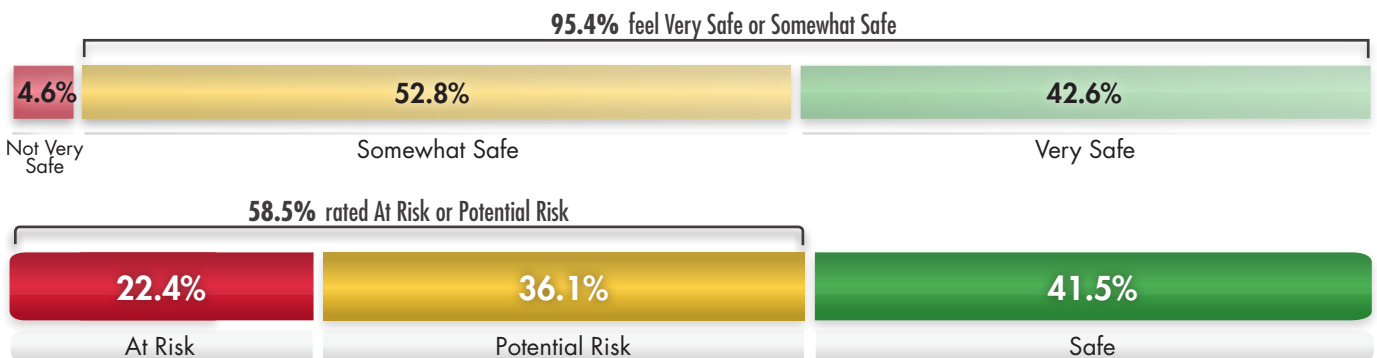
EXECUTIVE SUMMARY

Consumer Internet Security Study 2007: Comparing and contrasting consumer perceptions versus reality

Conducted by Itracks on behalf of Radialpoint Inc

1. SUMMARY - THE UNITED STATES

- Methodology** – 2,000 Internet subscribers from the United States, Canada, the United Kingdom and Spain were polled in a survey conducted by Radialpoint in July 2007 to assess Internet security perceptions - how safe they feel when it comes to their safety on the Internet versus a technical assessment of how safe they really are. Respondents were asked to answer a series of security-focused questions, after which they participated in a Radialpoint Security Advisor™ scan. Security Advisor™ is a new software diagnostic service which identifies whether any virus, spyware or personal firewall security software is present, determines its status and then calculates a corresponding safety rating – either *Safe*, *Potential Risk* or *At Risk*.
- PC Security Perception versus Reality in the United States** – An overwhelming 95% of respondents in the United States described their level of safety online as either “*Safe*” or “*Somewhat Safe*”. The reality proved very different - less than half (42%) correctly assessed their security status and received a score of “*Safe*” from the Security Advisor™ scan. Over half (58%) were rated by Security Advisor™ as either “*At Risk*” or “*Potential Risk*”. More than One in five (22%) received the worst rating of critically “*At Risk*” from online threats.
 - When asked how safe they felt their home PC was from **viruses**, an overwhelming 92% of all American respondents felt “*Very Safe*” or “*Somewhat Safe*”, whereas the Security Advisor™ scan revealed that in fact 45% were “*At Risk*” or “*Potential Risk*” from virus infection specifically.
 - When asked how safe they felt their home PC was from **spyware**, 92% of all American respondents felt “*Safe*” or “*Somewhat Safe*”. In contrast the Security Advisor™ scan revealed that the majority (58%) were “*At Risk*” or “*Potential Risk*” from spyware infection specifically. 19% were critically “*At Risk*” from spyware infection.
- Cultural Differences** – not surprisingly, North America and the UK demonstrated many cultural similarities, specifically a very high level of confidence when it comes to safety from online threats. Spain on the other hand was much more cautious. While Spanish subscribers were more at risk than they realized from online threats, they were the most accurate in terms of actually assessing their potential vulnerabilities. North American subscribers, in contrast, had the highest gap between perception and reality. British subscribers were both the most confident of their online safety, and scored higher in the technical assessment than did the other countries in the survey.



2. KEY FINDINGS - THE UNITED STATES

- While the overall percentage of respondents in North America and Europe who expressed perceptions of being either “Very Safe” or “Somewhat Safe” from online threats was similar, the percentage of those who indicated the more confident “Very Safe” was higher in North America. Specifically 43% in of Internet subscribers in the United States feel “Very Safe” compared to 41% and 15% in the UK and Spain respectively.
- The United States had a high percentage of respondents (92%) who confidently rated their safety from viruses specifically as either “Very Safe” or “Somewhat Safe” , which contrasted with Spanish respondents who were more cautious with only 78% rating themselves similarly secure.

In reality, the Security Advisor™ scan revealed that the numbers of respondents who were “At Risk” or “Potential Risk” were slightly different in the States and Spain (58% and 51% respectively). It was in the perception of safety from viruses that the greatest contrast between cultures was revealed.

- A similar high level of confidence regarding safety from **spyware** was exhibited by American subscribers, with 92% of respondents feeling “Very Safe” or “Somewhat Safe” , while 45% were in fact revealed to be either “At Risk” or “Potential Risk” from spyware infection. 44% of American subscribers expressed the highest level of confidence, rating themselves “Very Safe”, which compares to only 19% in Spain who felt similarly confident.
- American respondents were also more likely to look to their ISP to provide security software than those in the UK and Spain.

	United States	UK	Spain
Antivirus	17%	11%	7%
Antispyware	16%	12%	6%
Firewall	17%	14%	5%

Renewing Security Software

Security software often has set subscription periods, and after either a 30 or 90 day trial, or at the end of 12 months of use, users are prompted to renew their software subscription. Not doing so results in the halting of crucial updates, and the exposure of PCs to any of the thousands of new threats created daily since expiration. Despite this, consumers often decline when prompted to renew their security software. When asked, over one third (38%) of subscribers chose not to do so. More than half of them cited that it required too much effort (56%), i.e. it would take too long, they weren’t sure how to, it was deemed too disruptive, and so forth.

Identity Theft

In an interesting paradox, when respondents were asked to rank their perceived level of safety on their PC from **Identity Theft**, the vast majority (88%) stated that they felt either “*Very Safe*” or “*Somewhat Safe*”. However, when more personal and specific examples of Identity Theft were provided, much higher numbers expressed concern. For example, 60% expressed concern at “someone stealing my identity”, 62% expressed concern at “having my credit card number stolen” and 51% expressed concern at “someone accessing my financial/banking records”. This could indicate a disconnect – a lack of familiarity with the term Identity Theft in contrast with a real level of concern for the consequences as posed.

American Consumer Concerns Regarding Internet Usage

Respondents were asked to indicate what their key concerns were with regards to online safety and Internet usage.

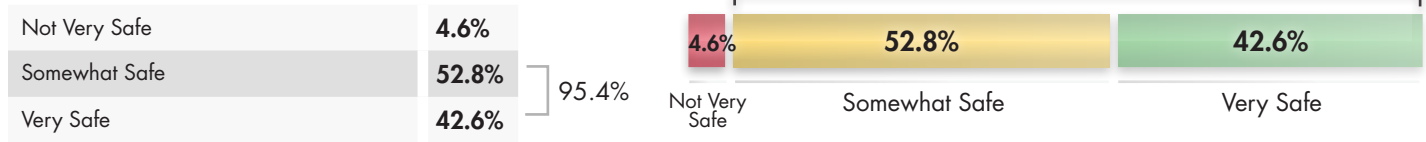
Four key areas of concern emerged:

PC Security (such as virus infections, hackers, etc)	87%
Personal/Identity Security (credit card, ID, financial, shopping)	80%
Internet Access Performance (speed, reliability)	41%
Child Safety (chat predators, inappropriate content exposure)	18%

3. TOTAL SURVEY RESULTS AND SCANS

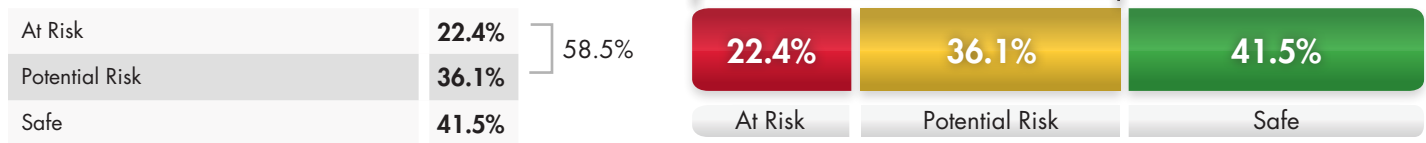
From Survey:

3.1 How safe do you feel your home PC is from online threats overall?

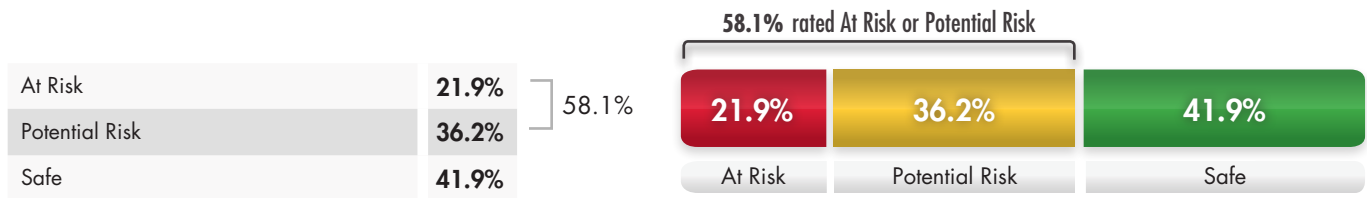


From Security Advisor Scan:

Overall Security Rating



Of those 95.4% who felt overall Very Safe/Somewhat Safe, what did their Security Advisor Scan show?

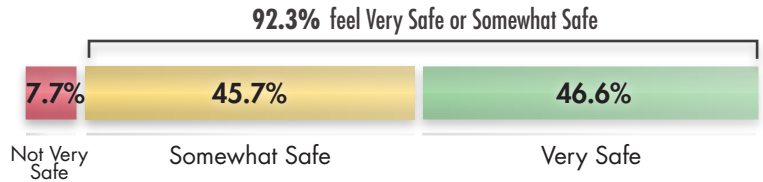


From Survey:

3.2 How safe do you feel your home PC is from the following online threat: Viruses?

Feel Not Very Safe	7.7%
Feel Somewhat Safe	45.7%
Feel Very Safe	46.6%

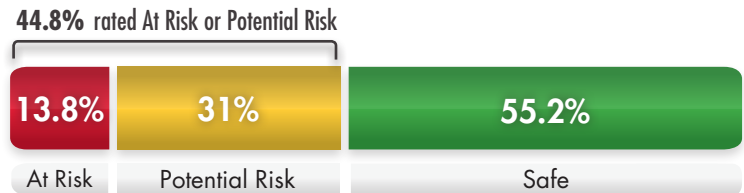
92.3%



**From Security Advisor Scan:
Anti-Virus Rating**

At Risk	13.8%
Potential Risk	31%
Safe	55.2%

44.8%



Of those **92.3% who felt overall Very Safe/Somewhat Safe**, what did their Security Advisor Scan show?

At Risk	12.9%
Potential Risk	31%
Safe	56.1%



Of those **7.7% who felt Not Very Safe**, what did their Security Advisor scans show?

At Risk	23.8%
Potential Risk	31%
Safe	45.2%

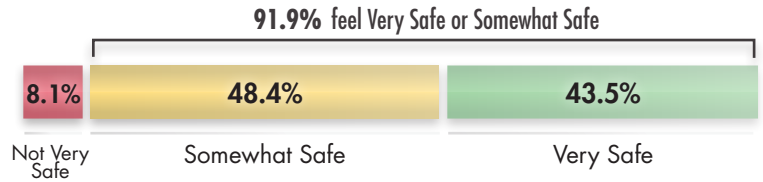


From Survey:

3.3 How safe do you feel your home PC is from the following online threat: Spyware?

Feel Not Very Safe	8.1%
Feel Somewhat Safe	48.4%
Feel Very Safe	43.5%

91.9%



**From Security Advisor Scan:
Anti-Spyware Rating**

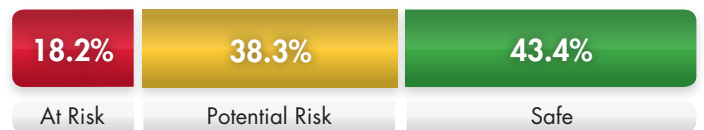
At Risk	19.4%
Potential Risk	38.2%
Safe	42.4%

57.6%



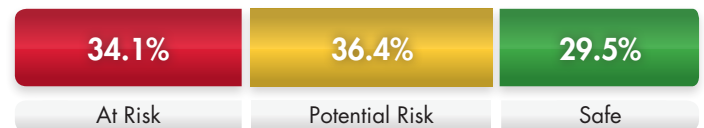
Of those **91.9% who felt overall Very Safe/Somewhat Safe**, what did their Security Advisor Scan show?

At Risk	18.2%
Potential Risk	38.3%
Safe	43.4%



Of those **8.1% who felt Not Very Safe**, what did their Security Advisor Scan show?

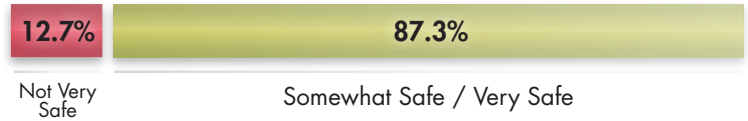
At Risk	34.1%
Potential Risk	36.4%
Safe	29.5%



From Survey:

3.4 How safe do you feel your home PC is from the following online threat: Hackers?

Feel Not Very Safe	12.7%
Feel Somewhat Safe / Feel Very Safe	87.3%



From Security Advisor Scan: Firewall Rating

At Risk	19.1%
Safe	80.9%



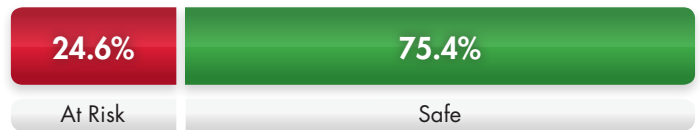
Of those **87.3%** who felt overall **Very Safe/Somewhat Safe**, what did their Security Advisor Scan show?

At Risk	18.3%
Safe	81.7%



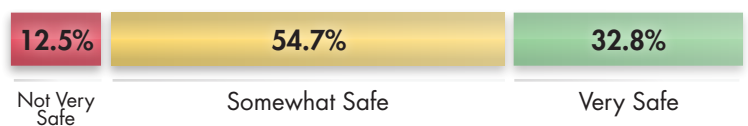
Of those **12.7%** who felt **Not Very Safe**, what did their Security Advisor Scan show?

At Risk	24.6%
Safe	75.4%

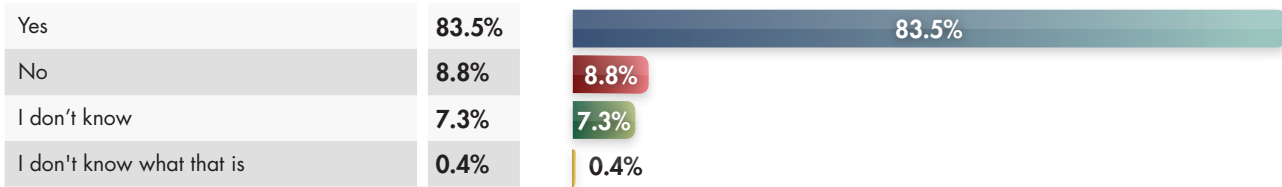


3.5 How safe do you feel your home PC is from the following online threat: Identity Theft?

Feel Not Very Safe	12.5%
Feel Somewhat Safe	54.7%
Feel Very Safe	32.8%

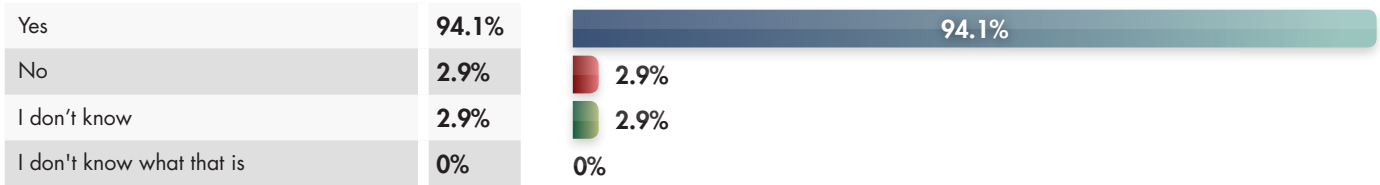


3.6 Do you currently have any of the following security software on your PC - firewall?



From Survey:

3.7 Do you currently have any of the following security software on your PC – anti-virus?

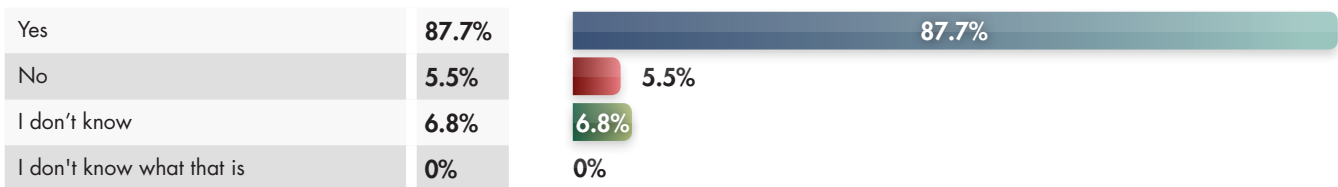


From Security Advisor Scan:



From Survey:

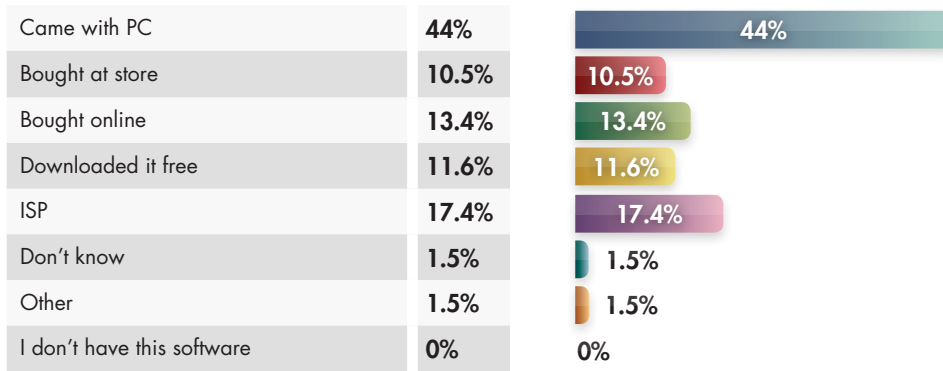
3.8 Do you currently have any of the following security software on your PC – anti-spyware?



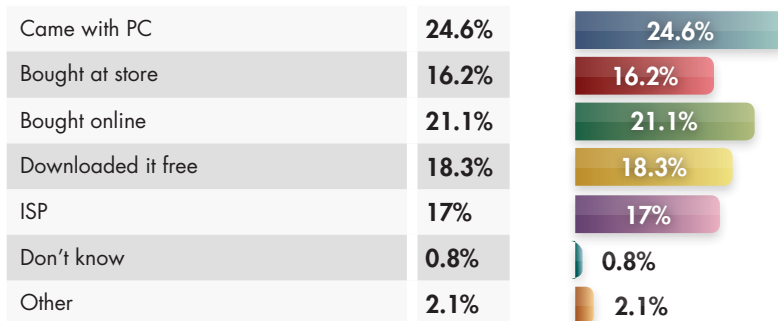
From Security Advisor Scan:



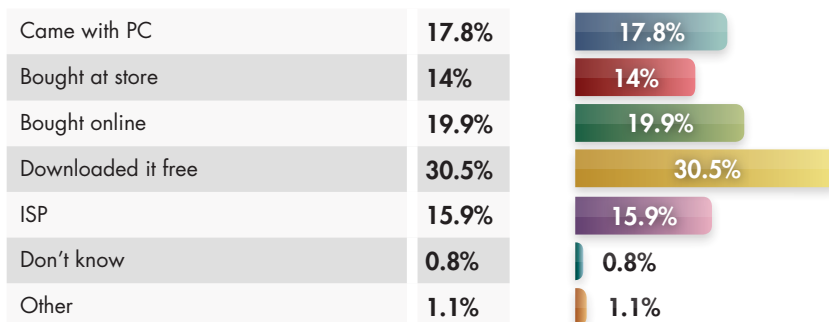
3.9 Where did you get your security software: firewall?



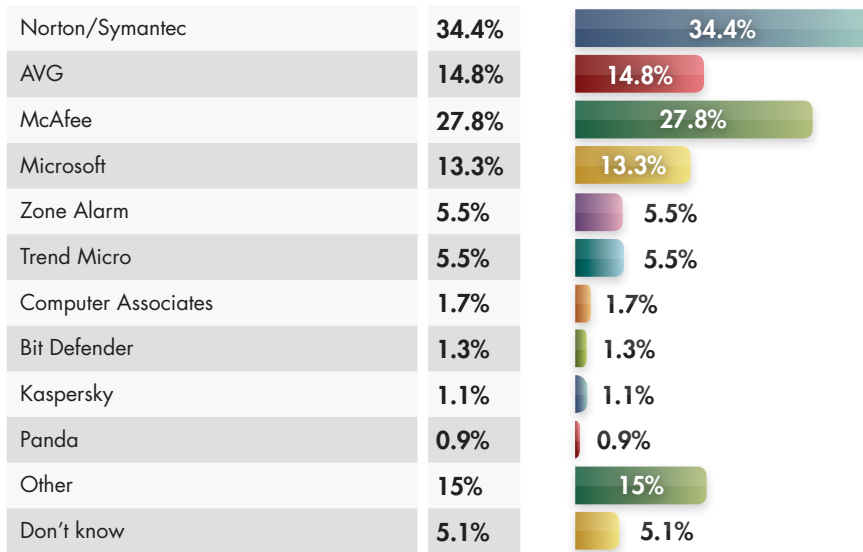
3.10 Where did you get your security software: anti-virus?



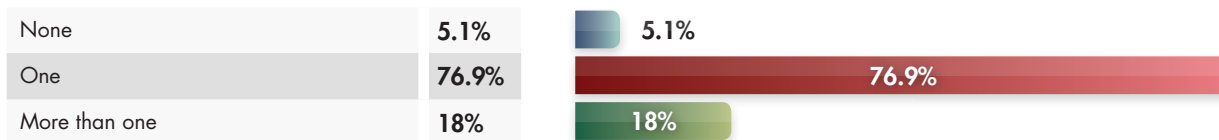
3.11 Where did you get your security software: anti-spyware?



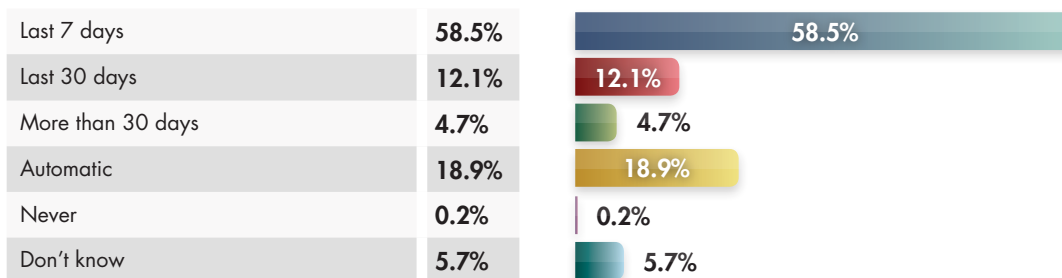
3.12 What security software are you currently using?



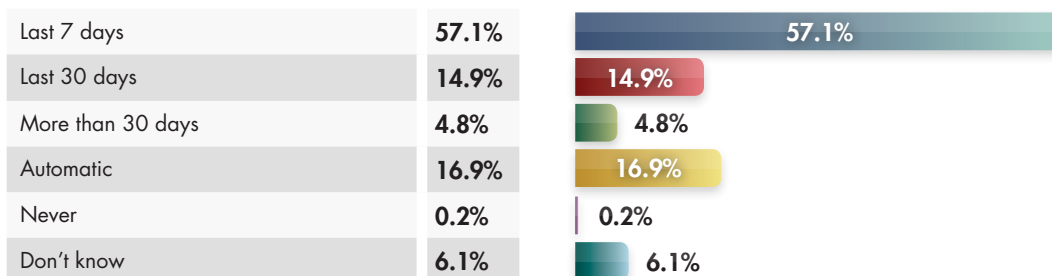
3.13 What is the number of security software installed?



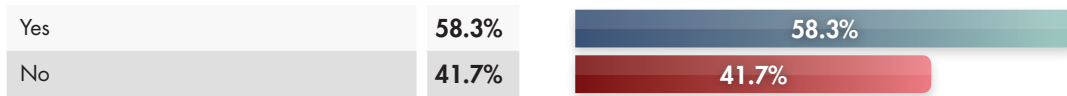
3.14 When were the following security features last updated on your computer – Anti-virus?



3.15 When were the following security features last updated on your computer – Anti-spyware?



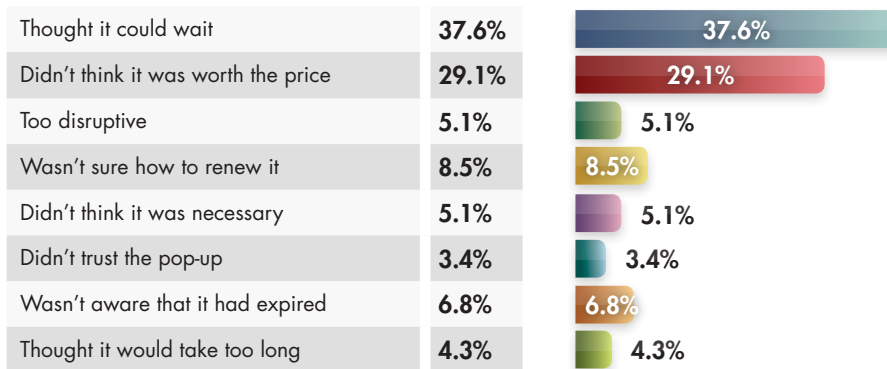
3.16 Have you ever received a renewal notification for your security software?



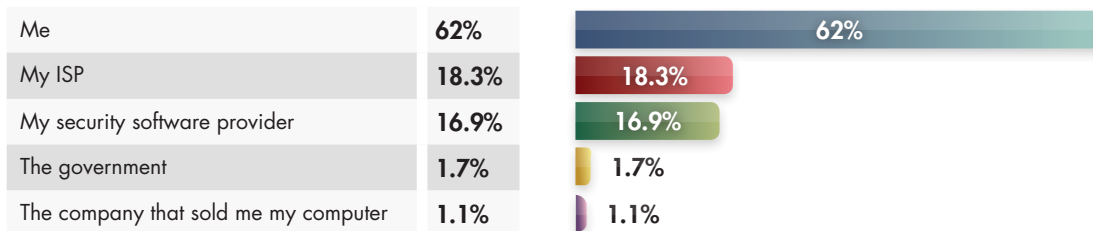
3.17 And did you immediately renew the security software?



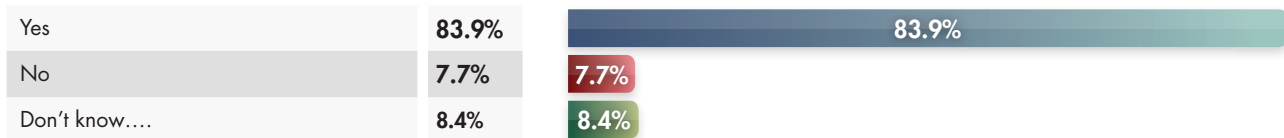
3.18 Why didn't you decide to renew your security software when you were prompted to?



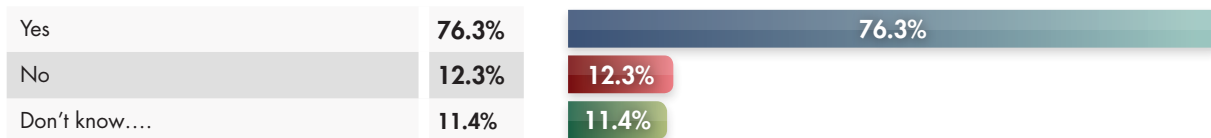
3.19 Who do you believe is primarily responsible for protecting your PC from online threats?



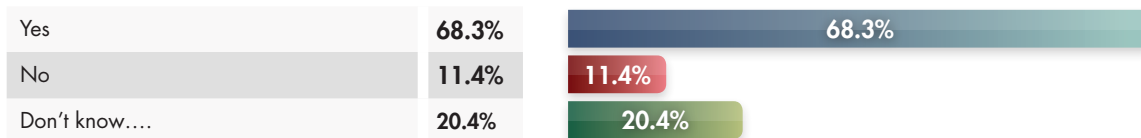
3.20 Do you think you are currently protected from viruses?



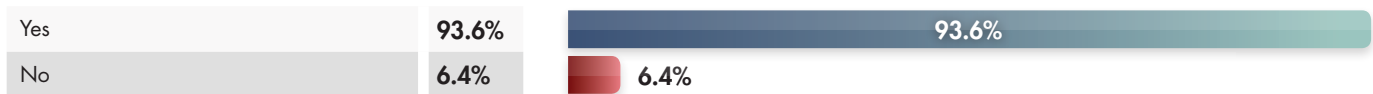
3.21 Do you think you are currently protected from spyware?



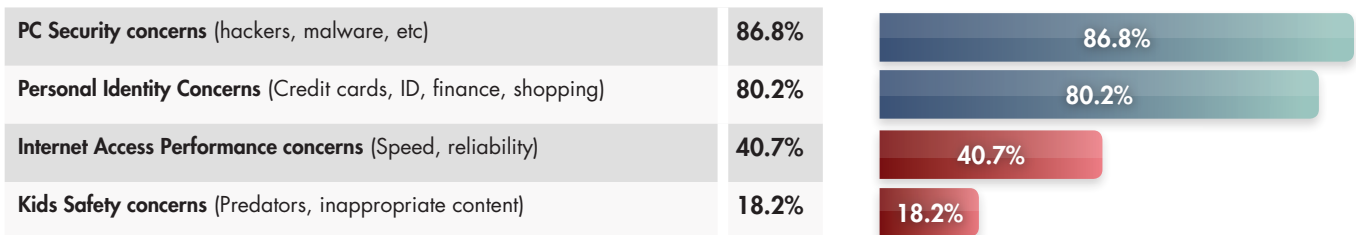
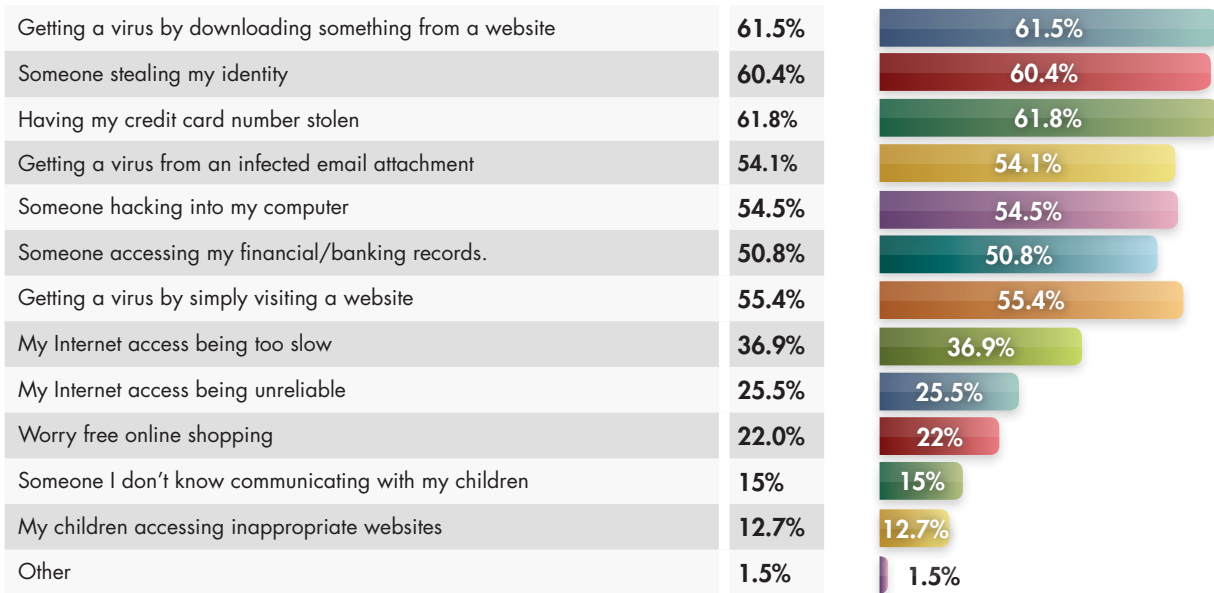
3.22 Do you think you are currently protected from hackers?



3.23 Would it be helpful to be able to diagnose or check your online security status on a regular basis to make sure your PC is safe from security threats?



3.24 What are you most concerned about when using the Internet?



4. APPENDIX

Security Advisor Scan Ratings

OVERALL SECURITY RATING:

At Risk:

- ✗ If any of the categories Virus Protection, Spyware Protection or Firewall are rated At Risk.

Potential Risk:

- ✗ If any of the categories Virus Protection, Spyware Protection or Firewall are rated Potential Risk **AND** none are rated At Risk.

Safe:

- ✓ If all categories Virus Protection, Spyware Protection or Firewall are rated Safe.

VIRUS SECURITY RATING:

At Risk:

- ✗ Virus Protection not installed, or installed but not running, **AND/OR**
- ✗ Real-time Virus Protection turned off or not detected **AND** Virus definition files not up-to-date (2 days or older)

Potential Risk:

- ✗ Real-time Virus Protection turned off or not detected **OR** Virus definition files not up-to-date (2 days or older), **AND/OR**
- ✗ Virus Protection detected, but status could not be determined

Safe:

- ✓ Virus Protection installed and running, **AND**
- ✓ Real-time Virus Protection turned on, **AND**
- ✓ Virus definition files up-to-date (< 2 days old)

SPYWARE SECURITY RATING:

At Risk:

- ✗ Spyware Protection not installed, or installed but not running, **AND/OR**
- ✗ Real-time Spyware Protection turned off or not detected **AND** Spyware definition files not up-to-date (7 days or older)

Potential Risk:

- ✗ Real-time Spyware Protection turned off or not detected **OR** Spyware definition files not up-to-date (7 days or older), **AND/OR**
- ✗ Spyware Protection detected, but status could not be determined

Safe:

- ✓ Spyware Protection installed and running, **AND**
- ✓ Real-time Spyware Protection turned on, **AND**
- ✓ Spyware definition files up-to-date (< 7 days old)

FIREWALL SECURITY RATING:

At Risk:

- ✗ Firewall not installed, or installed but not running

Safe:

- ✓ Firewall installed and running

Note: not all security rating percentages will total 100% as in some cases a few percentage points of scans could not be verified.

ABOUT RADIALPOINT

Radialpoint is a leading provider of managed Internet service solutions for internet providers. Its Managed Service Delivery Platform enables large and mid-sized providers to generate new revenue and significantly lower operational costs associated with supporting and bringing new Internet services to market. Radialpoint's managed security services and value-added service solutions are currently available to over 22.5 million internet subscribers worldwide.

Radialpoint is headquartered in Montreal, Canada, with offices in Europe.

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