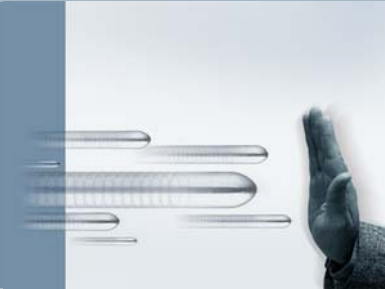




Consumer Products and Solutions Strategy Briefing



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SVP Security Products and Solutions
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Today's Discussion Topics

- 1 Symantec Today
- 2 New Realities
- 3 New Solutions for a Changing Landscape
- 4 Symantec's Future:
Security 2.0 - Delivering Trust Online



Symantec Today

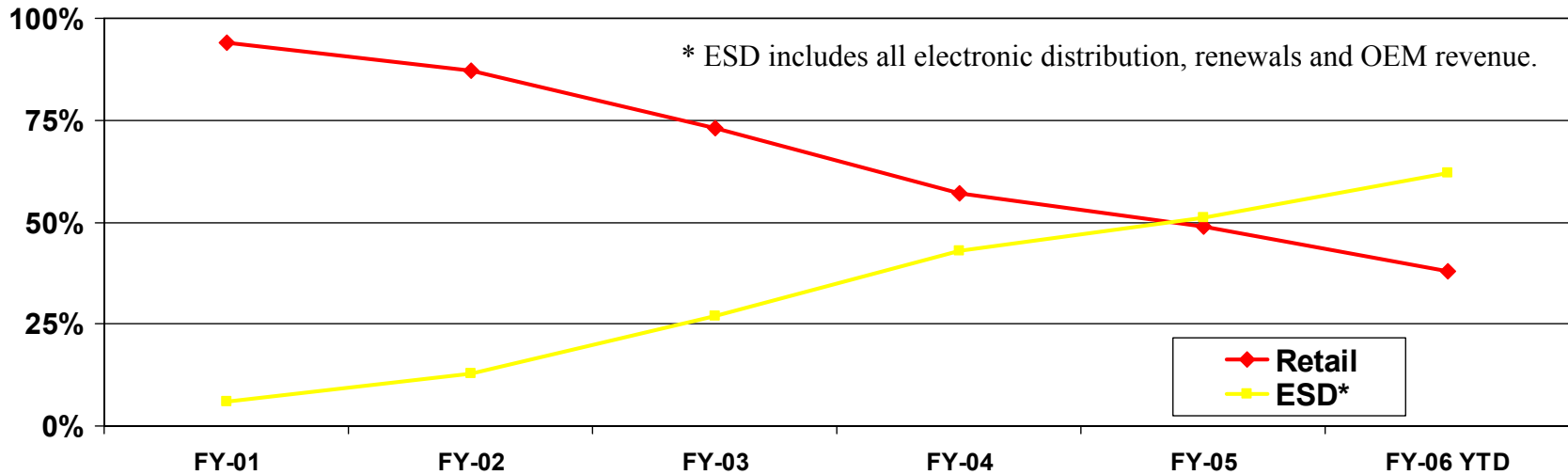
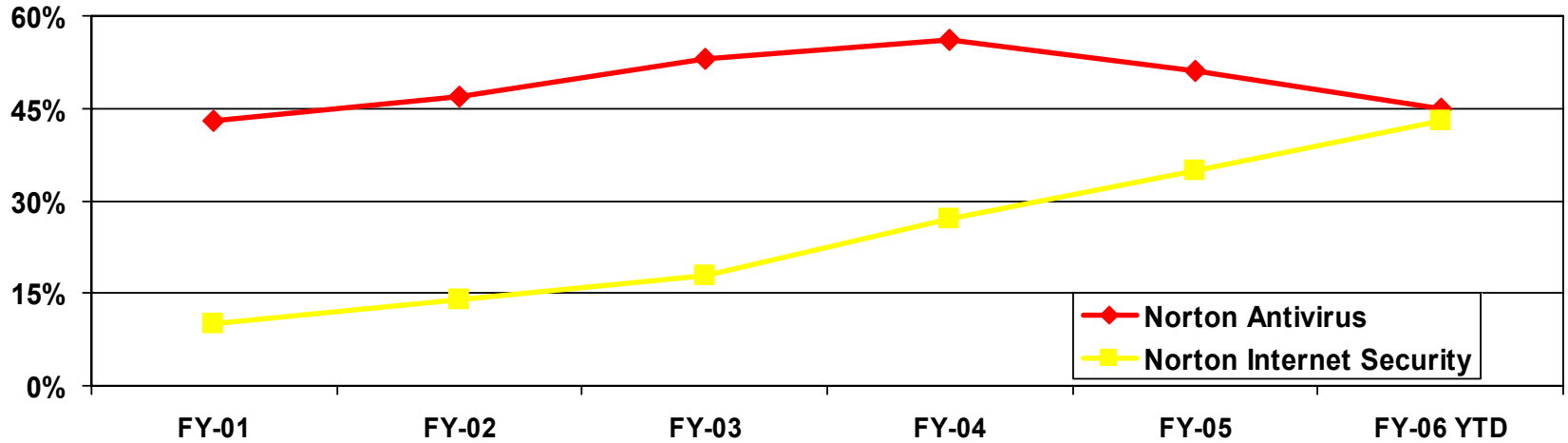


Symantec's Position in the Consumer Marketplace

- ▶ #1 market share
 - ~3 times the size of nearest competitor
- ▶ Largest installed base of active customers
 - > 50 million paying subscribers worldwide
 - Protect over 370 million computers or email accounts worldwide
- ▶ 15 years of providing “peace-of-mind” to consumers
 - Most trusted and recognized consumer security brand
 - 20,000 Internet threat detectors in 180 countries, proactively hunting down threats
- ▶ Most complete line of internet and data security products



Customer Migration to Suite and Electronic Channels



Broadest Consumer Reach

Over 36,000
Retail Stores
Globally



Online
Stores



On 50 of the
Major PC
OEMs
Worldwide



Work With
150 of the
World's xSP





New Realities



Consumer Trust Online is Eroding

Fear of IDENTITY THEFT

53%

of Internet users say they've stopped giving out personal information to websites because of concern about identity theft.



Reduced INTERNET USE

30%

have reduced their overall use of the Internet.



Impact on ECOMMERCE

42%

of consumers indicate that concerns about online attacks such as phishing impact their online shopping behavior.



Fear of ONLINE BANKING

14%

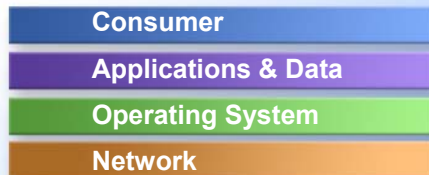
of this group have stopped paying bills online and 4% have stopped banking online altogether.



Sources: Gartner and Cyber Security Industry Alliance, June 2005

New Realities

A New ATTACK ENVIRONMENT



Threats are evolving with consumer behavior and hackers have new motivations.

A New CONSUMER



- Prefer simplicity and practical applications
- Gravitating to faster, two-way communications
- Engaging in more sensitive transactions (e.g. online banking)
- Facing complex technologies

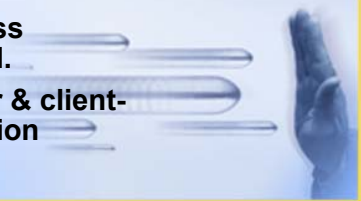
Evolving BUSINESS Environment

- Purchase preference is moving online.
- Service-based delivery model taking hold
- Portals and content providers embedding security in the Internet experience



A New Definition of SECURITY

- Complete solutions are more than just antivirus & firewall.
- Convenient, seamless experience is crucial.
- Trusted peer-to-peer & client-to-host communication



New Consumer

- ▶ Awareness of need for security is at an all-time high, but users are confused about security technologies.
- ▶ Symantec estimates that 30% - 40% of all connected consumer systems are not adequately protected.
- ▶ Consumers are generating more irreplaceable digital content.
 - More than 75% of consumers who take digital photos store them on their PC. *(Source: Forrester, March 2005)*

8:00 AM
Banking Online



10:00 AM
Working at Home



12:00 PM
At Lunch



8:00 PM
Homework



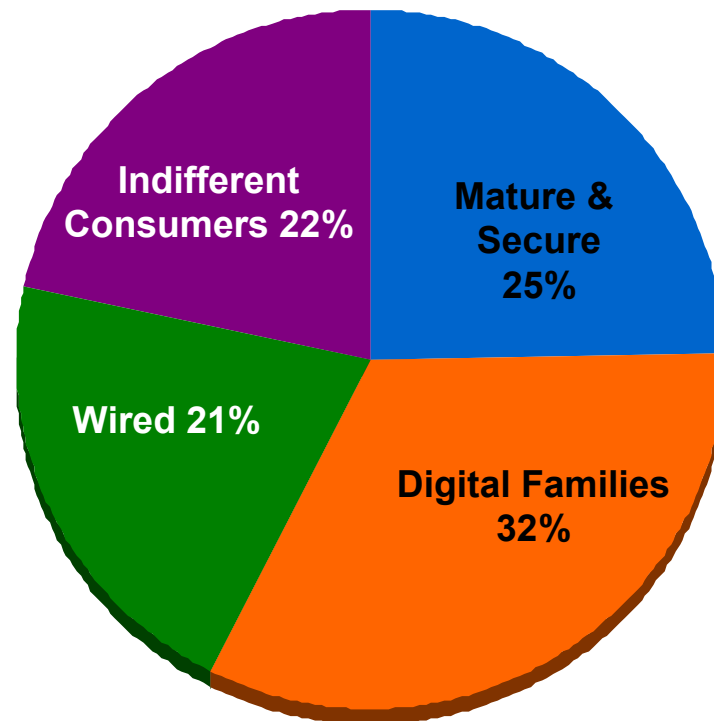
11:00 PM
Check Email



The New Consumer Segmentation Model

- These 4 segments differ in terms of behavior, attitudes, demographics and needs for security software
- The Digital Families segment is the largest segment, the other 3 segments are very similar to each other in size

Size of each of the 4 Segments
% of U.S. Online Household Population





*New Solutions for a
Changing Landscape*



Consumer Vision: End-to-End Security and Trust



Trusted **ONLINE** Transactions

Comprehensive **END-POINT** Security

Symantec Product Portfolio

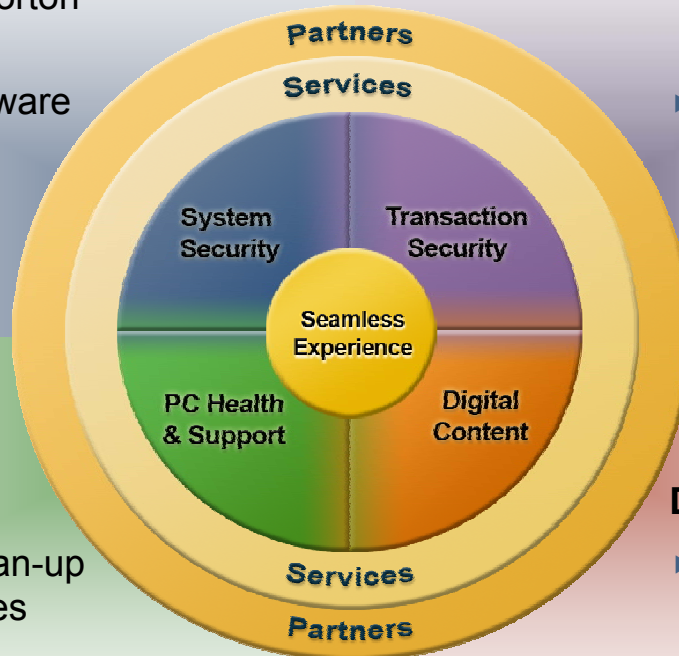
The Building Blocks of Comprehensive Security

SYSTEM SECURITY

- ▶ Industry leading security solutions with Norton AntiVirus and Norton Internet Security
- ▶ Major advancements in spyware detection and removal

PC HEALTH AND SUPPORT

- ▶ Wide range of recovery, clean-up and optimization technologies
- ▶ Partnering to offer complete support solutions to consumers



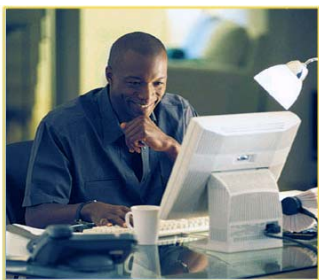
TRANSACTION SECURITY

- ▶ Using zero-hour protection technology to create new consumer product
- ▶ Partnerships with financial institutions and ecommerce providers to enable trust online

DIGITAL CONTENT SECURITY

- ▶ Building new technologies and products to protect digital content
- ▶ Integration with System Security product lines

Evolution of Consumer Security



PC Security and Health

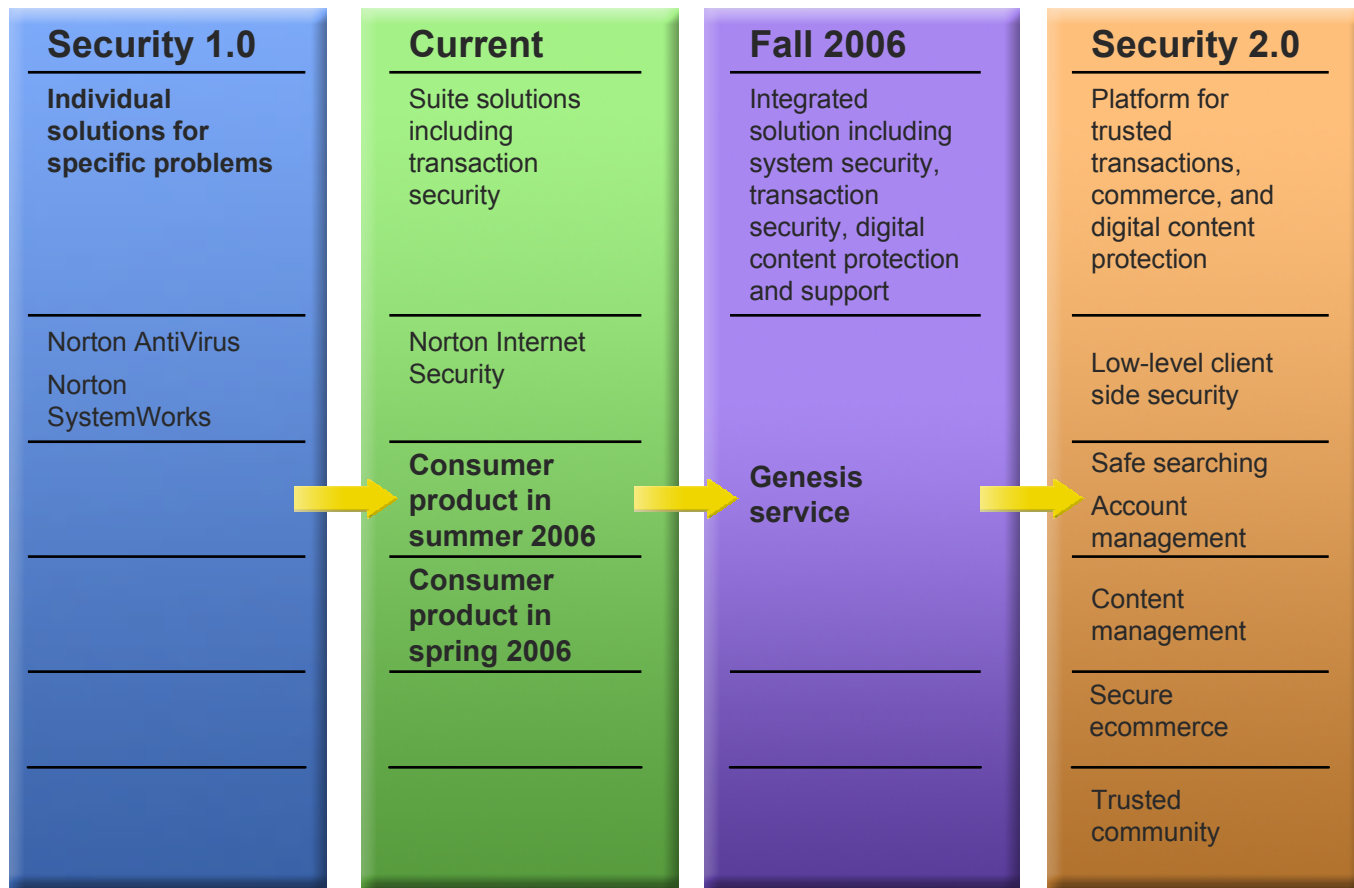
Online Transaction Security

Digital Content Security

Online Commerce Security

Online Community Security

Security Focus



PC based security

End-to-end security

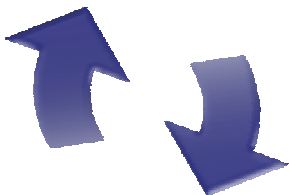
Digital Content Security

- ▶ Protects everything you care about on your PC
 - Financial information
 - Photos and home video
 - Documents and email
 - Music
- ▶ From the things that concern you the most
 - Virus & spyware attacks
 - Hacking, tampering, and theft
 - Hard drive failure
 - Natural disaster
 - Software failure
 - Accidental deletion
- ▶ Builds on success of Norton Ghost
 - One step backup

Transaction Security



- ▶ Provides real-time protection of personal information used in online transactions, including protection from high-risk crimeware and continually evolving online scams
- ▶ Protects consumers from fraudulent attempts to steal their confidential information or entire identities



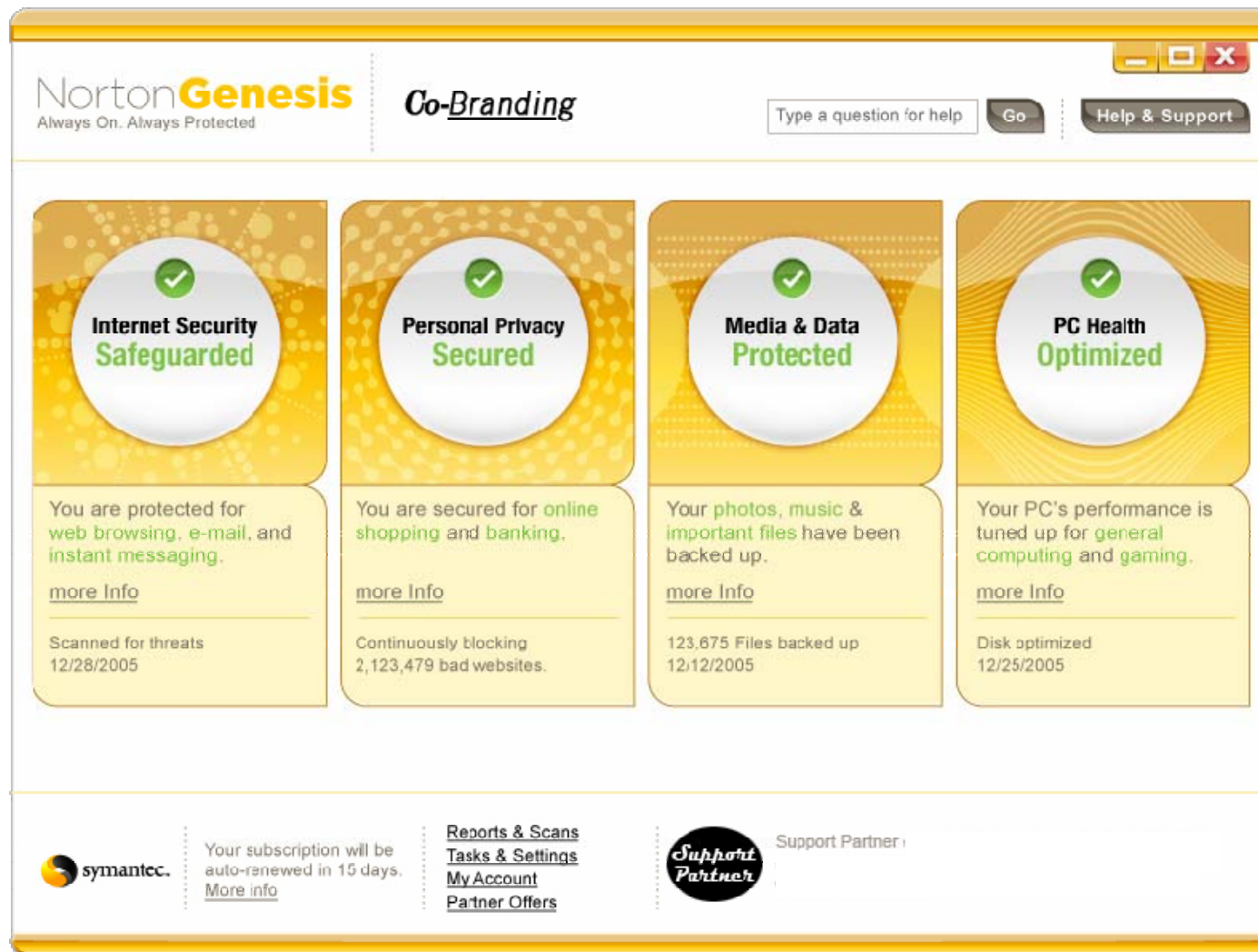
New Transaction Security Product

- ▶ Web browsing protection
- ▶ Website authentication
- ▶ Confidential information management & protection
- ▶ Contextual crimeware protection
(when confidential info is being shared)

Genesis: New Complete Personal Security Service

- ▶ Genesis is a seamlessly integrated complete personal security *service* for consumers
- ▶ Genesis integrates proven, industry-leading Norton technologies:
 - Antivirus, anti-spam, anti-spyware, intrusion prevention, and firewall
 - PC optimization and maintenance
 - New technologies in zero-hour threat prevention, anti-phishing, and identity theft prevention
 - Online/offline file-and-folder backup and recovery
 - Integrated access to support services
- ▶ Genesis is NOT a suite or bundle of tools but rather a single, integrated software application delivered to consumers as a service





Seamless Integration and New Experience




Norton Genesis
Always On. Always Protected


Co-Branding

Type a question for help

<p></p> <p>Internet Security Safeguarded</p>	<p></p> <p>Personal Privacy Secured</p>	<p></p> <p>Media & Data Protected</p>	<p></p> <p>PC Health Optimized</p>
<p>You are protected for web browsing, e-mail, and instant messaging.</p> <p>more info</p> <hr/> <p>Scanned for threats 12/28/2005</p>	<p>You are secured for online shopping and banking.</p> <p>more info</p> <hr/> <p>Continuously blocking 2,123,479 bad websites.</p>	<p>Your photos, music & important files have been backed up.</p> <p>more info</p> <hr/> <p>123,675 Files backed up 12/12/2005</p>	<p>Your PC's performance is tuned up for general computing and gaming.</p> <p>more info</p> <hr/> <p>Disk optimized 12/25/2005</p>

 symantec. Your subscription will be auto-renewed in 15 days. [More info](#)

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 Support Partner



Symantec's Future:

*Security 2.0
Delivering Trust Online*



Security 2.0: Delivering Trust Online

- ▶ Symantec has the technology, brand and installed base to enable a new age of trust on the Internet
 - Pervasive end-to-end security
 - Streamlined online activities

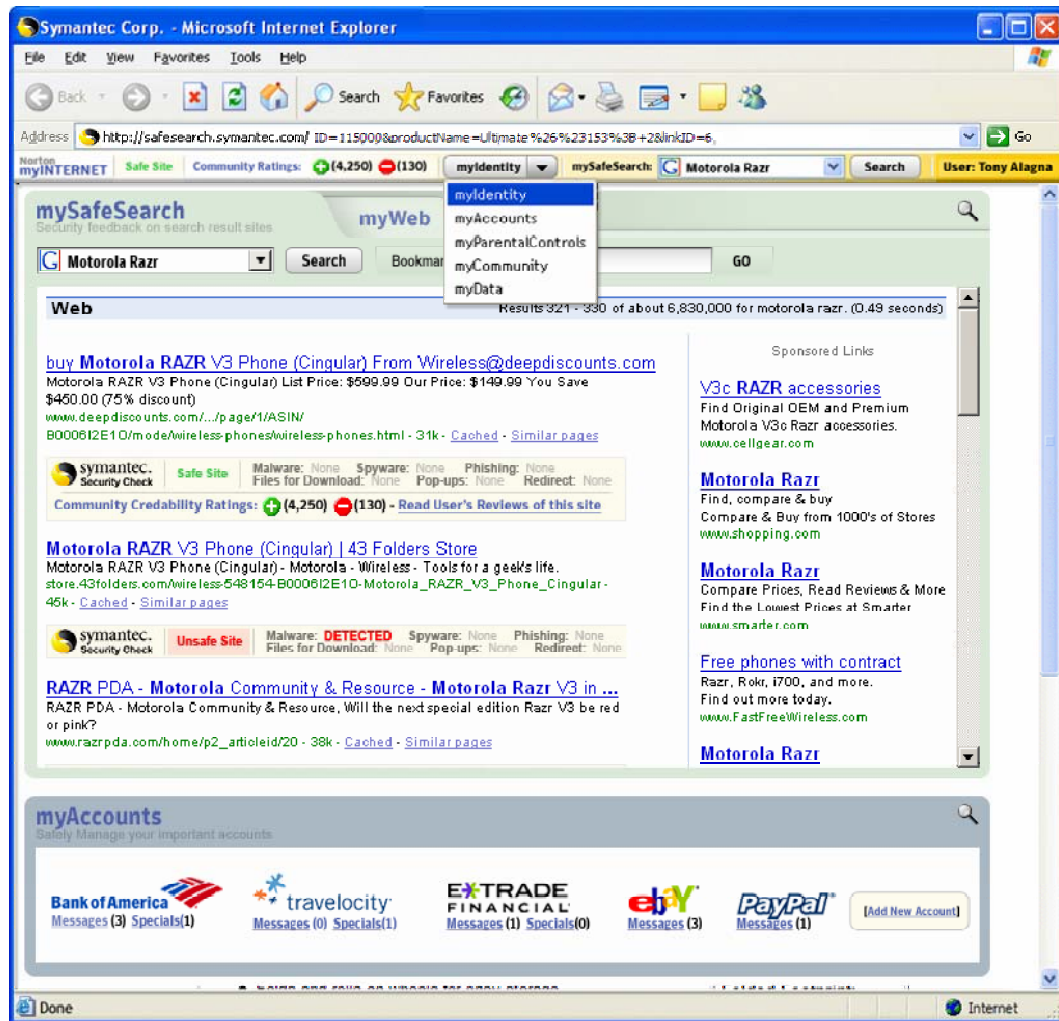
- ▶ Security 2.0 solutions will establish trust between parties - ensure that “you are you, and they are they”
 - Business to Consumer
 - Consumer to Consumer

- ▶ Security 2.0 expands beyond protecting the infrastructure and information to protecting relationships

- ▶ This is possible via a combination of client-side technologies, on-line infrastructure and key partnerships
 - Low-level client side security
 - Pervasive central consumer identity clearing house
 - Non-traditional two-factor identification and mutual authentication

Security 2.0 Concept Example: Trusted Search Experience

- ▶ Adds Symantec credibility rating to content and commerce sites in real time
- ▶ Safety and security information about sites before visiting them
- ▶ Community Credibility Ratings to police ecommerce and content sites through authenticated community membership



The screenshot shows a Microsoft Internet Explorer browser window displaying a search results page for 'Motorola RAZR' on the mySafeSearch website. The browser's address bar shows the URL: <http://safesearch.symantec.com/>. The search results are displayed in a list format, with each result including a title, a brief description, and a Symantec Security Check rating. The ratings are shown as a green plus sign followed by a number in parentheses, indicating a positive rating. For example, the first result has a rating of (4,250) and is marked as a 'Safe Site'. The second result has a rating of (130) and is marked as an 'Unsafe Site'. The page also features a 'myAccounts' section at the bottom, which lists various accounts such as Bank of America, travelocity, EXTRADE FINANCIAL, eBay, and PayPal, along with their respective message and special offers counts.

Leading the Next Generation of Consumer Security

- ▶ Symantec is the most trusted and recognized consumer security brand.
- ▶ Largest installed base of active customers
- ▶ Long-term vision of pervasive, end-to-end security
- ▶ Delivering new products and services in the near-term that address a changing landscape





*Thank You
Questions?*

