

IDG Research Services Study  
Conducted for RSA  
April 2009

This survey was conducted via the Internet between April 1, 2009 and April 8, 2009.

Respondents were screened for employment at companies with revenues of \$1 billion or more and the responses of those who identified themselves as the head of IT or head of IT security at their entire organization or location are included in the final results.

The study closed on April 8, 2009 with a total of 100 qualified responses.

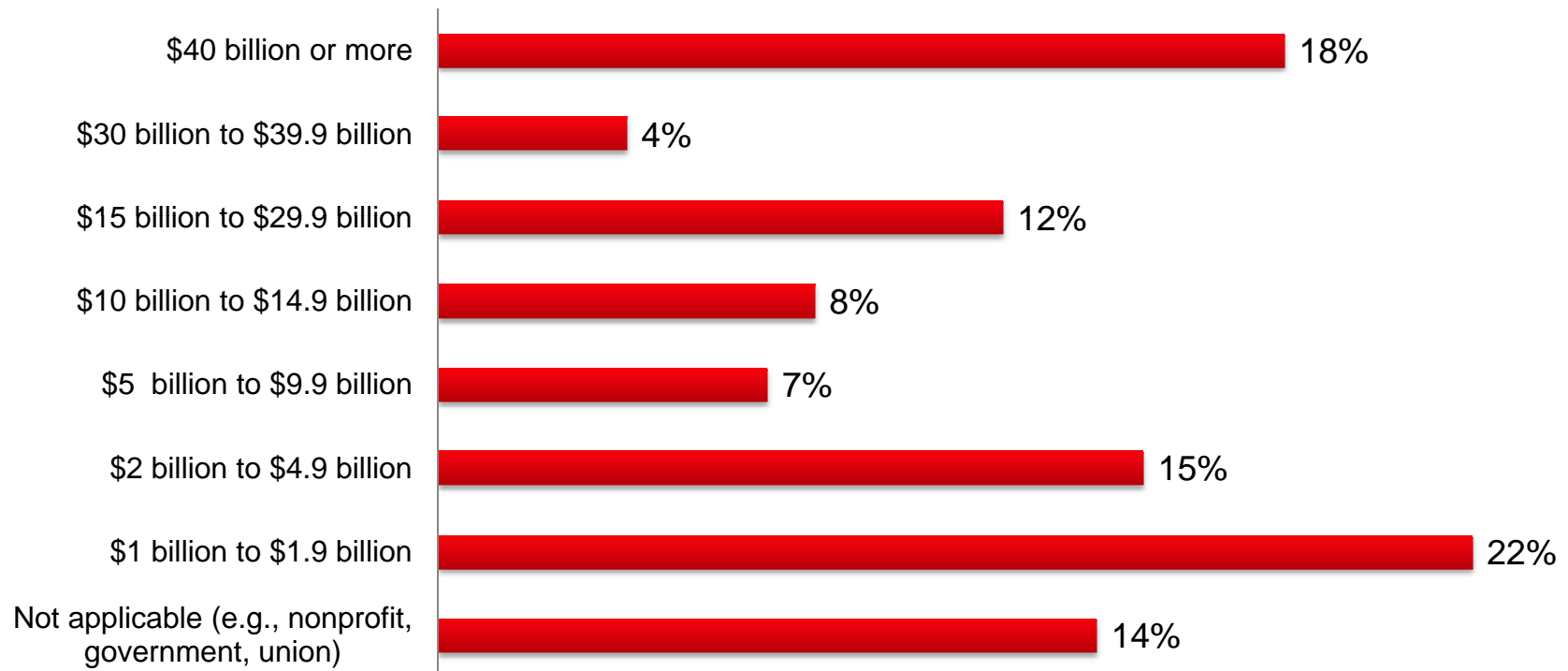
## Key Findings

- 73% of respondents agree that their organizations are becoming hyper-extended enterprises. More than half report increased usage of virtualization technology, personal consumer mobile devices and social networking platforms/media at their companies over the past 12-24 months.
- More than one-third (35%) of the respondents indicate there are gaps in the risk assessment process associated with the increased use of web and communication technologies, and 22% report that corporate security is either brought in only when problems occur or not made aware of the use of these technologies at all.
- Forty-four percent (44%) of the respondents indicate their security teams have created “acceptable use” policies for employees who use social networking sites, and 30% report their companies instead block employee access to these sites.
- Just under one-third (31%) of the respondents’ companies have at least some enterprise applications or business processes running in the cloud, and 16% have plans to migrate applications or processes in the next 12 months. Among these respondents, two-thirds (66%) do not yet have a security strategy in place for cloud computing.
- Just 17% of the respondents whose companies are operating or planning to migrate applications/business processes to the cloud are “very confident” in their companies’ readiness for widespread adoption of cloud computing.
- The majority of respondents whose companies have already migrated or are planning to migrate enterprise applications or processes to the cloud agree that there is uncertainty regarding the maintenance of data integrity and compliance while operating in the cloud. In fact, 51% report that a lack of transparency for cloud vendor security processes is a top concern with respect to using shared multi-enterprise resources in the cloud.
- 81% of the respondents have some level of concern regarding an increase in risk tolerance at their companies due to increasing pressure to cut costs and generate revenue. Just under three-quarters report they are at least somewhat concerned about an escalation of insider threats as a result of increased layoffs and cost cutting.
- More than seven out of ten respondents (71%) indicate their companies have experienced a security issue in the past 18 months (most commonly, a malware infection (52%)).
- More than three-quarters of the respondents agree with a series of statements regarding the need to change and improve upon the approach to enterprise security strategy.

# Respondent Profile

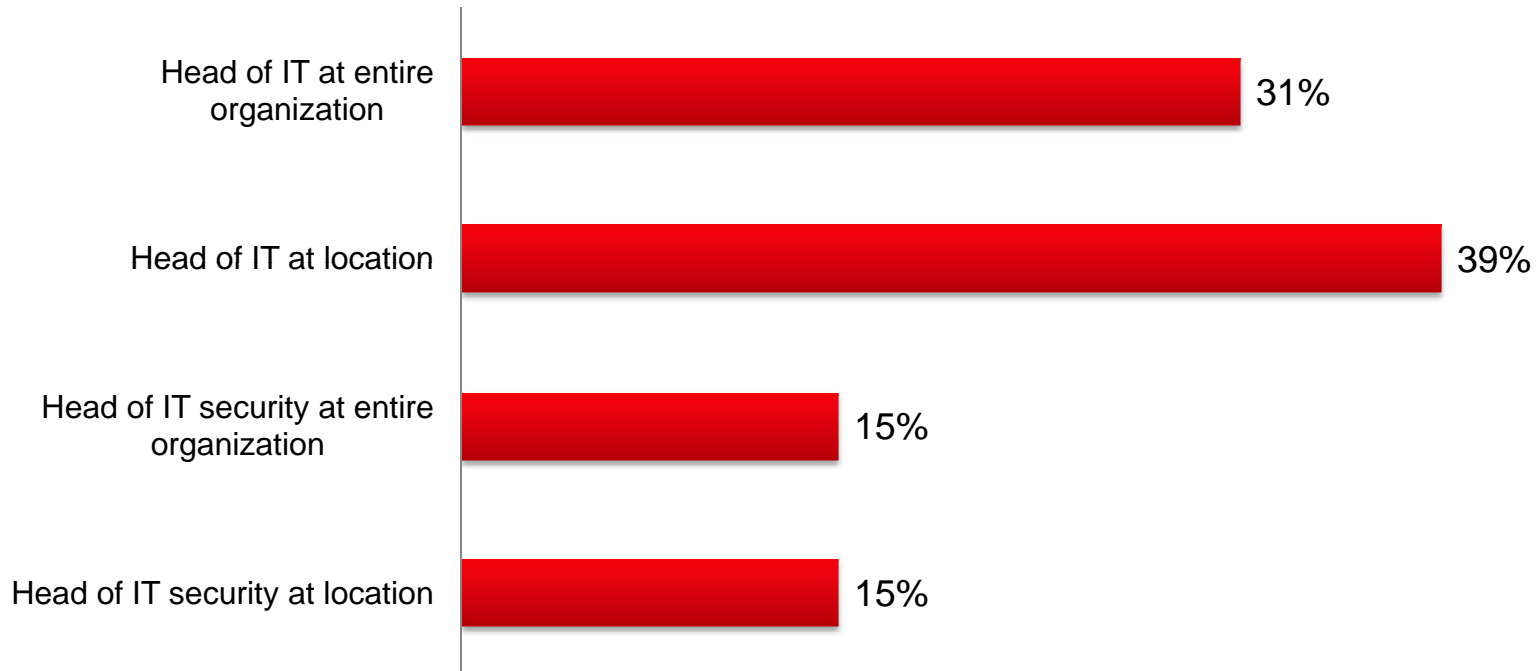
# Gross Sales/Revenues

**Average annual gross sales/revenues = \$15.6 billion**



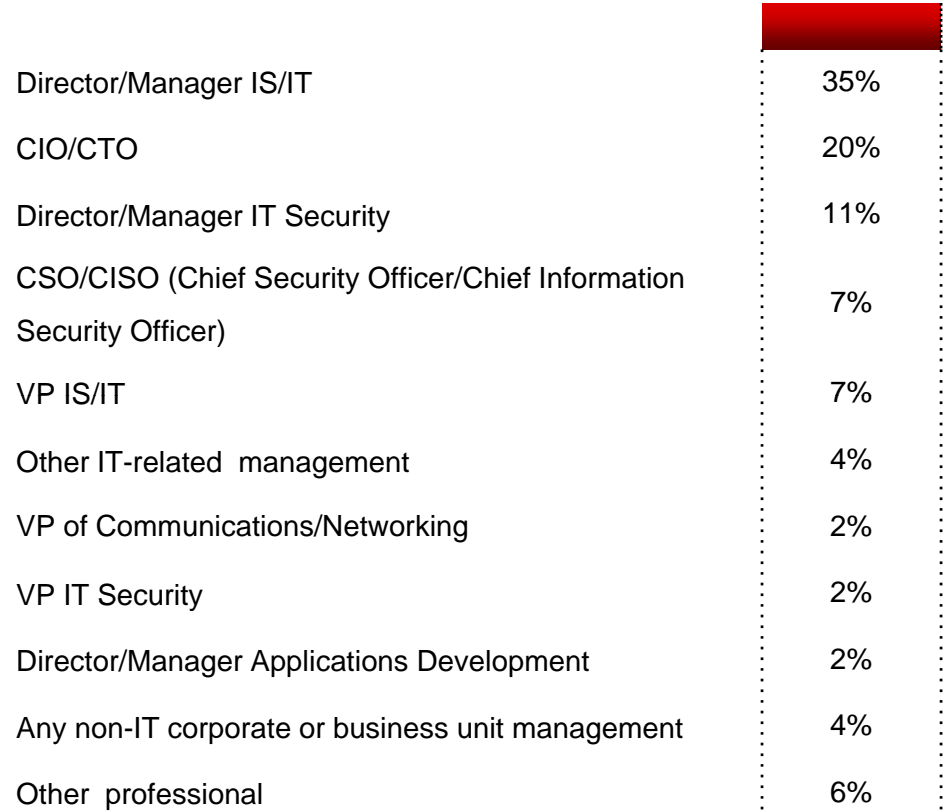
QS1: Please select the dollar amount that best represents the annual gross sales or revenues for your organization or enterprise (include all plants, divisions, branches, parents, and subsidiaries worldwide). Base: 100 qualified respondents

## Job Role



Q1: Which of the following best describes your role at your organization? Base: 100 qualified respondents

# Job Title



Director/Manager IS/IT	35%
CIO/CTO	20%
Director/Manager IT Security	11%
CSO/CISO (Chief Security Officer/Chief Information Security Officer)	7%
VP IS/IT	7%
Other IT-related management	4%
VP of Communications/Networking	2%
VP IT Security	2%
Director/Manager Applications Development	2%
Any non-IT corporate or business unit management	4%
Other professional	6%

QD1: Which of the following best describes your title within your organization? Base: 100 qualified respondents

# Primary Business/Industry

## Noncomputer-Related Industries (NET)

Finance/Banking/Accounting	16%
Healthcare/Medical Services/Pharmaceutical/ Bio-Tech	13%
Manufacturing	11%
Education/Nonprofit	7%
Wholesaler/Retailer/Distributor	7%
Government: State or Local (including Law Enforcement)	5%
Automotive/Transportation	4%
Insurance	4%
Government: Federal (including Military)	3%
Mining/Oil/Gas	3%
Media (Publishing/Broadcast)/Advertising/PR	2%
Utilities (Water, Gas, etc.)	2%
Aerospace/Defense Contractor	1%
Agriculture/Construction	1%
Real Estate/Legal	1%
Other noncomputer related	3%

83%

## Computer-Related Industries (NET)

Computer or Network Consultant/Data Processing Services	7%
Manufacturing - Hardware	2%
Manufacturing - Software	2%
Service Provider (ISP/ASP/MSP/BSP/ESP/Web Hosting)	2%
VAR/VAD/OEM/Systems or Network Integrator	2%
Communication Carriers (Telecomm/Data Comm)	1%
Other computer related	1%

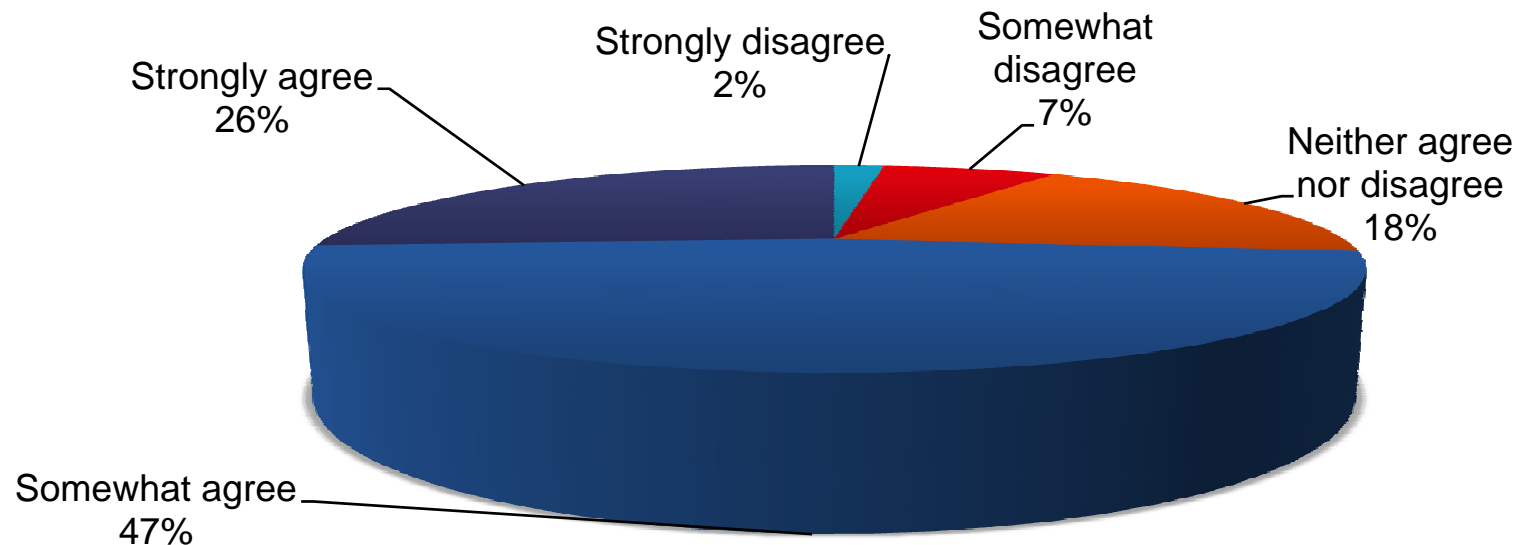
17%

# Survey Findings

73% of respondents agree that their organizations are becoming hyper-extended enterprises (as defined in this survey)

*In this survey we are defining the “**hyper-extended enterprise**” as an enterprise powered by new web and communications technologies, where information is exchanged with more constituencies in more ways and in more places than ever before. Hyper-extended enterprises typically integrate a vast array of third parties (customers, partner, suppliers, etc.) into their operations.*

**My organization is becoming a hyper-extended enterprise:**



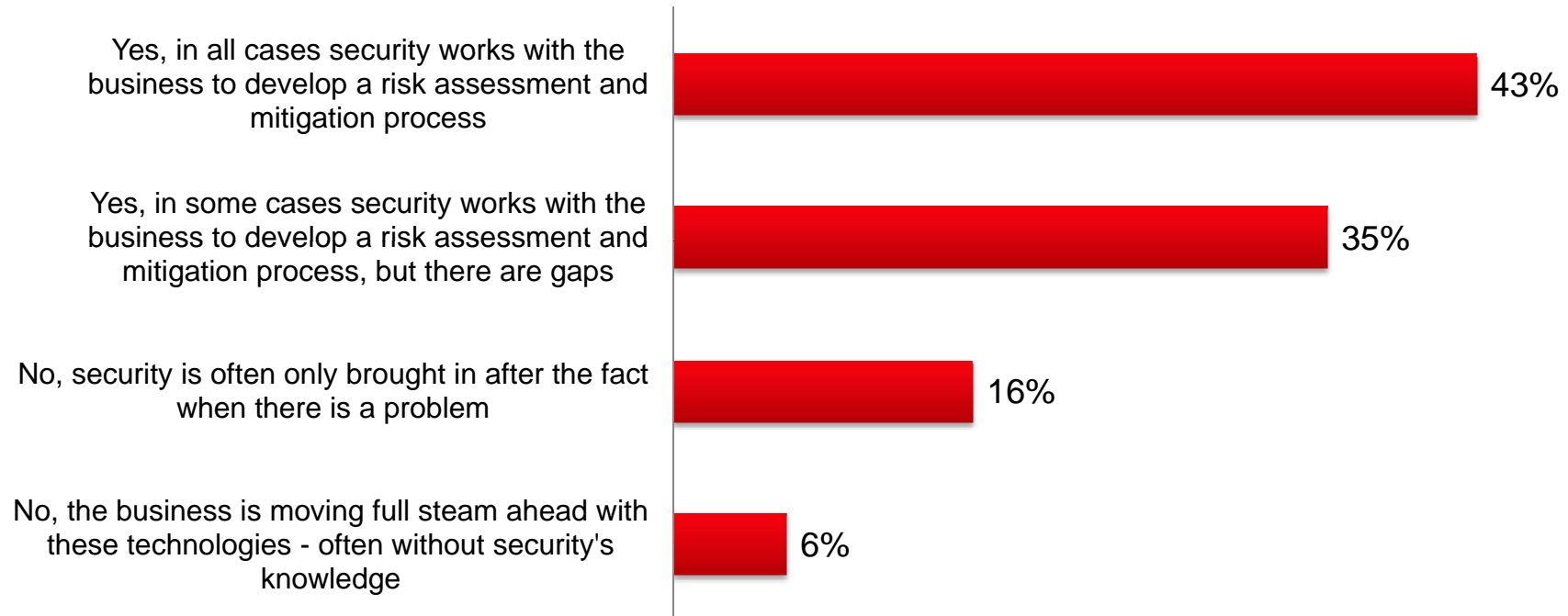
Q2: With reference to the description above, please rate your agreement with the following statement: Base: 100 qualified respondents

The majority of respondents report increased usage of virtualization technology, mobile devices and social networking platforms/media over the past 12-24 months

	Increase in usage	No change in usage	Decrease in usage	Not applicable
Virtualization technology	<b>83%</b>	13%	-	4%
Personal consumer mobile devices such as iPhones	<b>65%</b>	25%	3%	7%
Social networking platforms/media	<b>51%</b>	34%	-	15%
Cloud computing	<b>34%</b>	44%	-	22%
Consumer VoIP services such as Skype	<b>25%</b>	48%	4%	23%

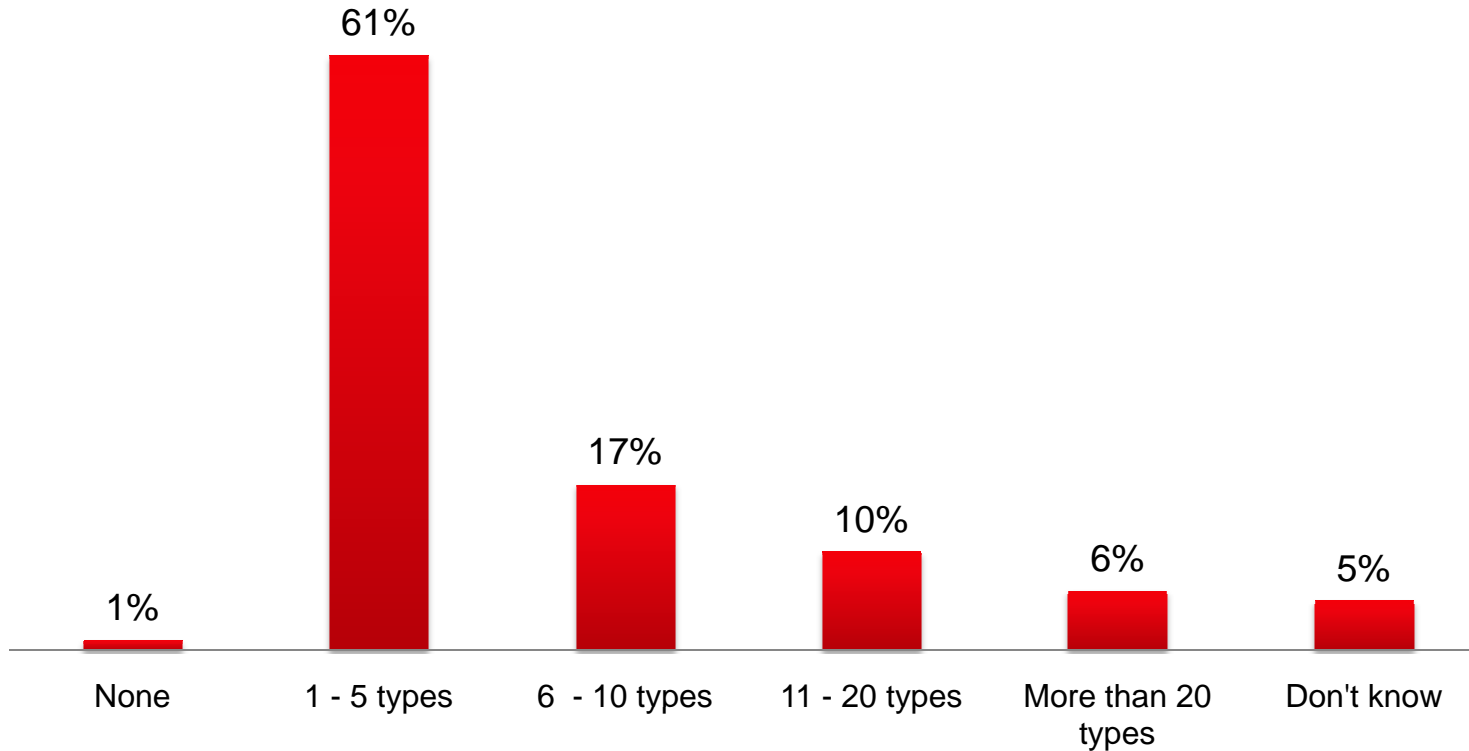
Q3: How has usage of the following web and communications technologies (for business purposes) changed at your company over the past 12-24 months? Base: 100 qualified respondents

Less than half (43%) report that security works with the business in *all* cases to calculate/address the risks associated with web and communication technologies



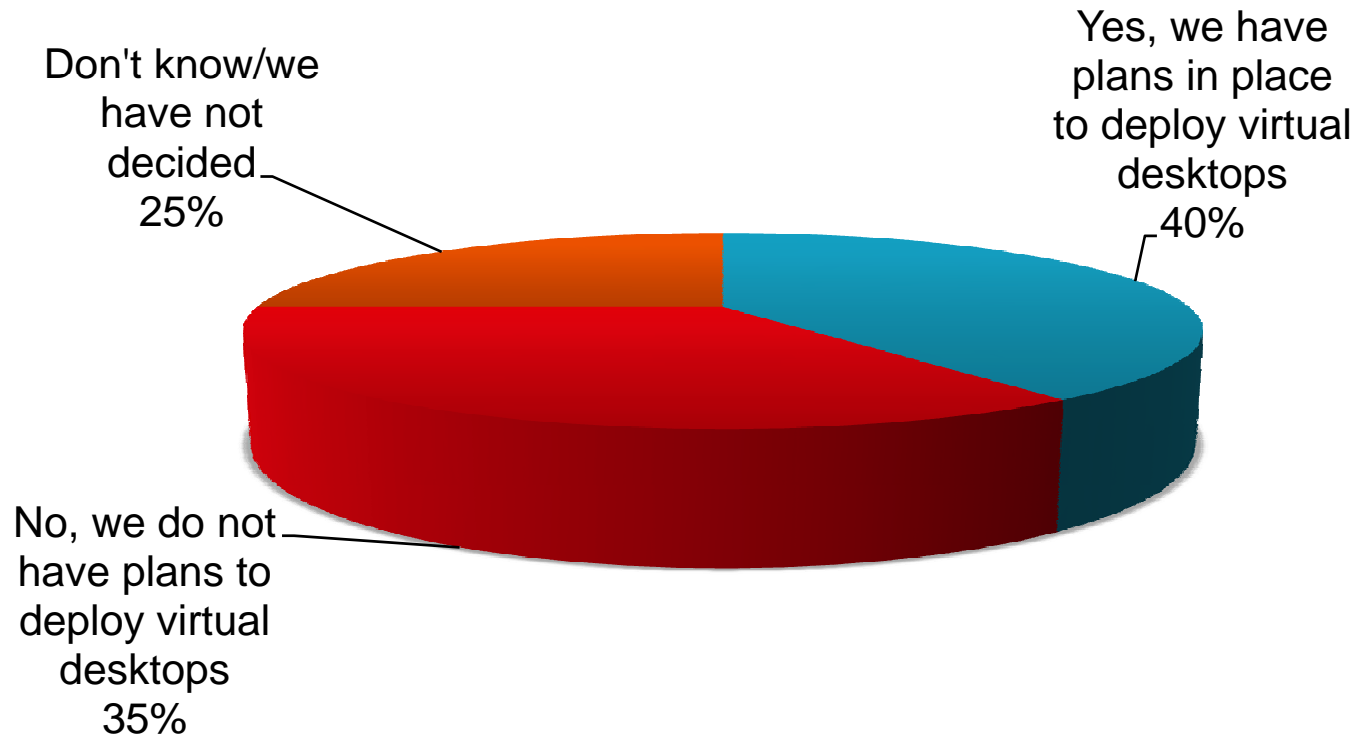
Q4: Does your company's security team have the opportunity to thoroughly calculate and address the risks associated with web and communication technologies (such as cloud computing, virtualization, mobile devices, VoIP services and social networking platforms) before they are implemented? Base: 100 qualified respondents

The enterprise security team supports an average of six different types of end user devices currently



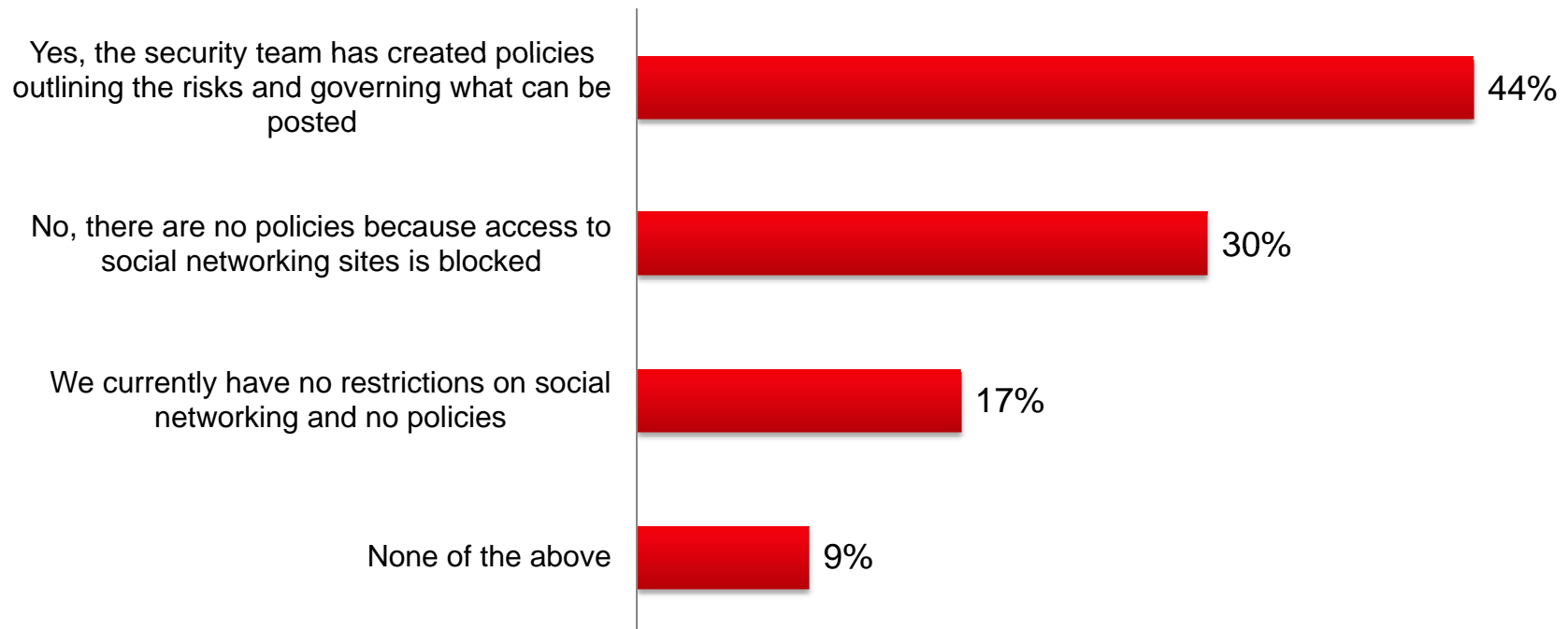
Q5: How many different types/models of end-user devices (such as PDAs) does your enterprise security team currently support? Base: 100 qualified respondents

40% of respondents' organizations have plans to deploy virtual desktops in the next 18 months



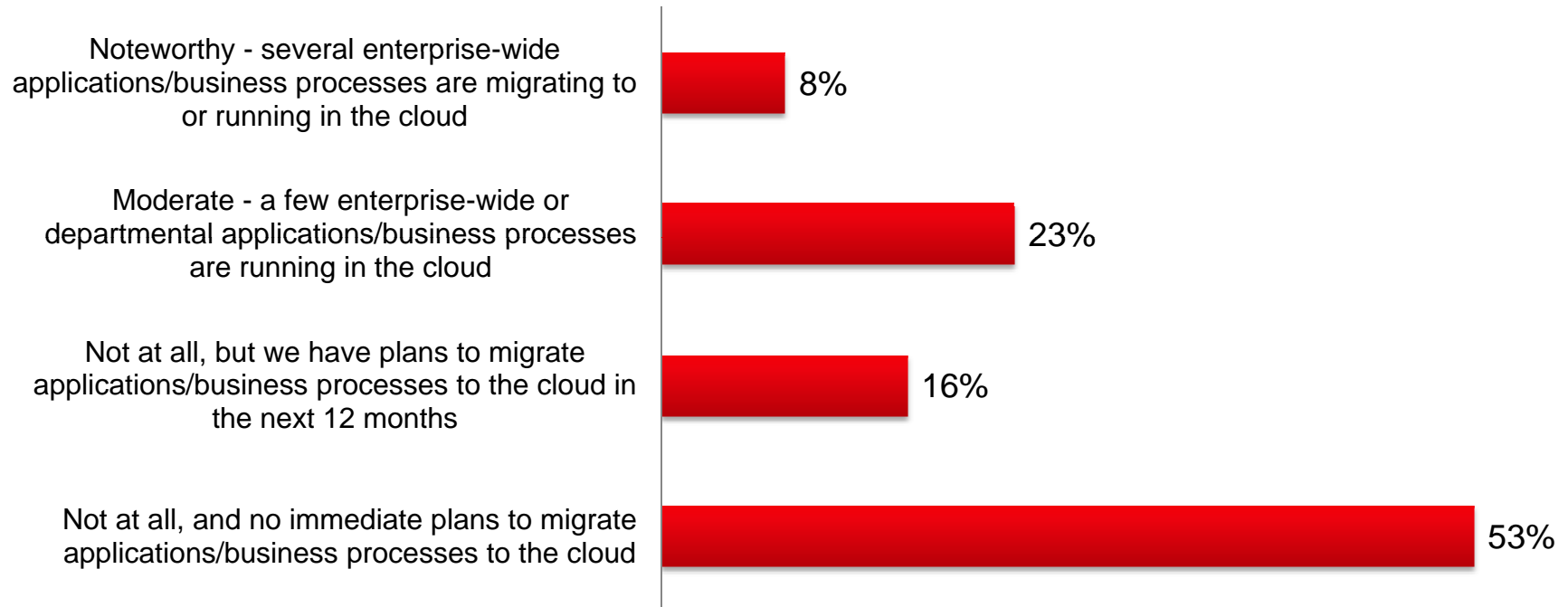
Q6: Does your organization plan to deploy virtual desktops in the next 18 months? Base: 100 qualified respondents

44% report their security teams have created “acceptable use” policies for use of social networking sites; 30% indicate access to these sites is blocked



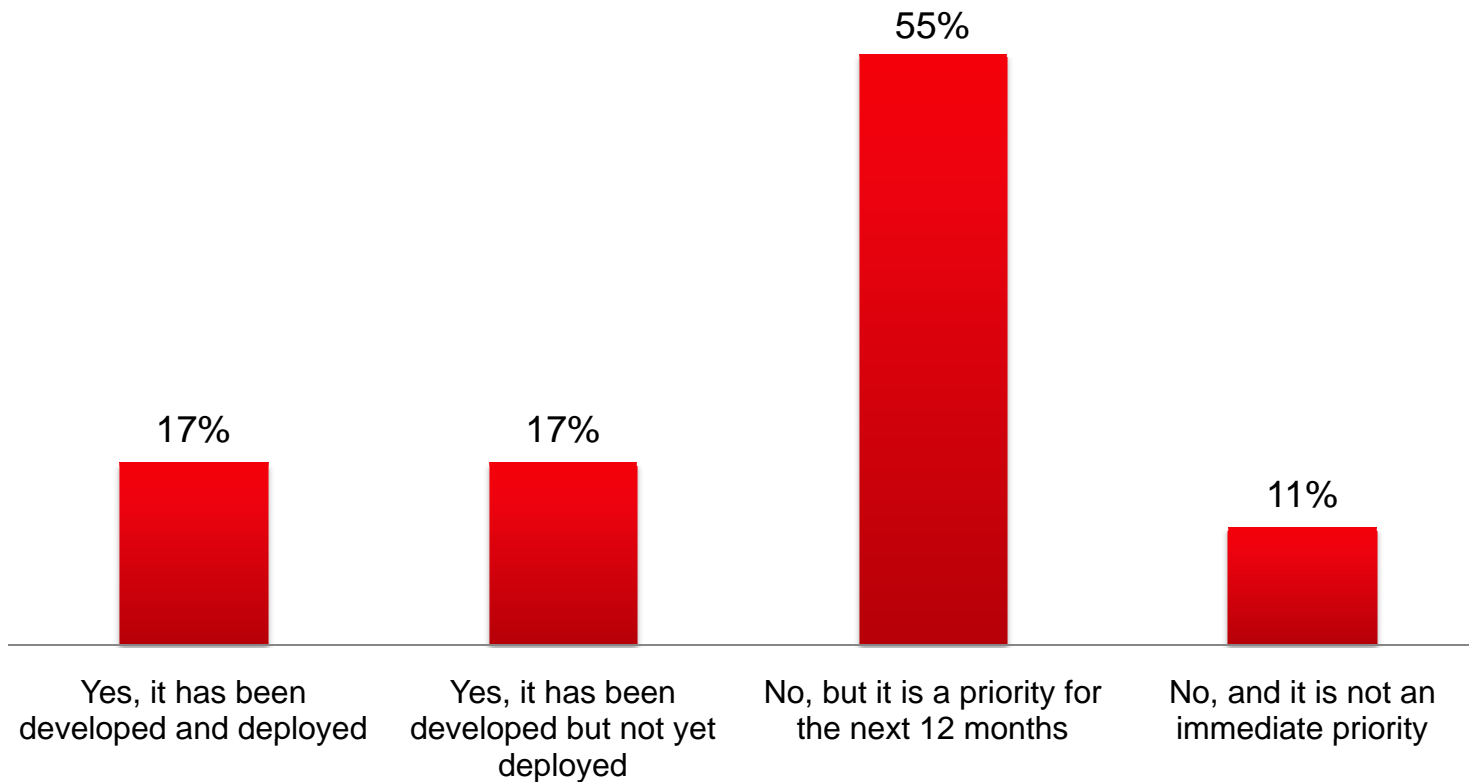
Q7: Has your organization's enterprise security team developed an "acceptable use policy" for employees who use social networking sites? Base: 100 qualified respondents

31% indicate their companies already have at least a few enterprise-wide or departmental applications/business processes running in the cloud



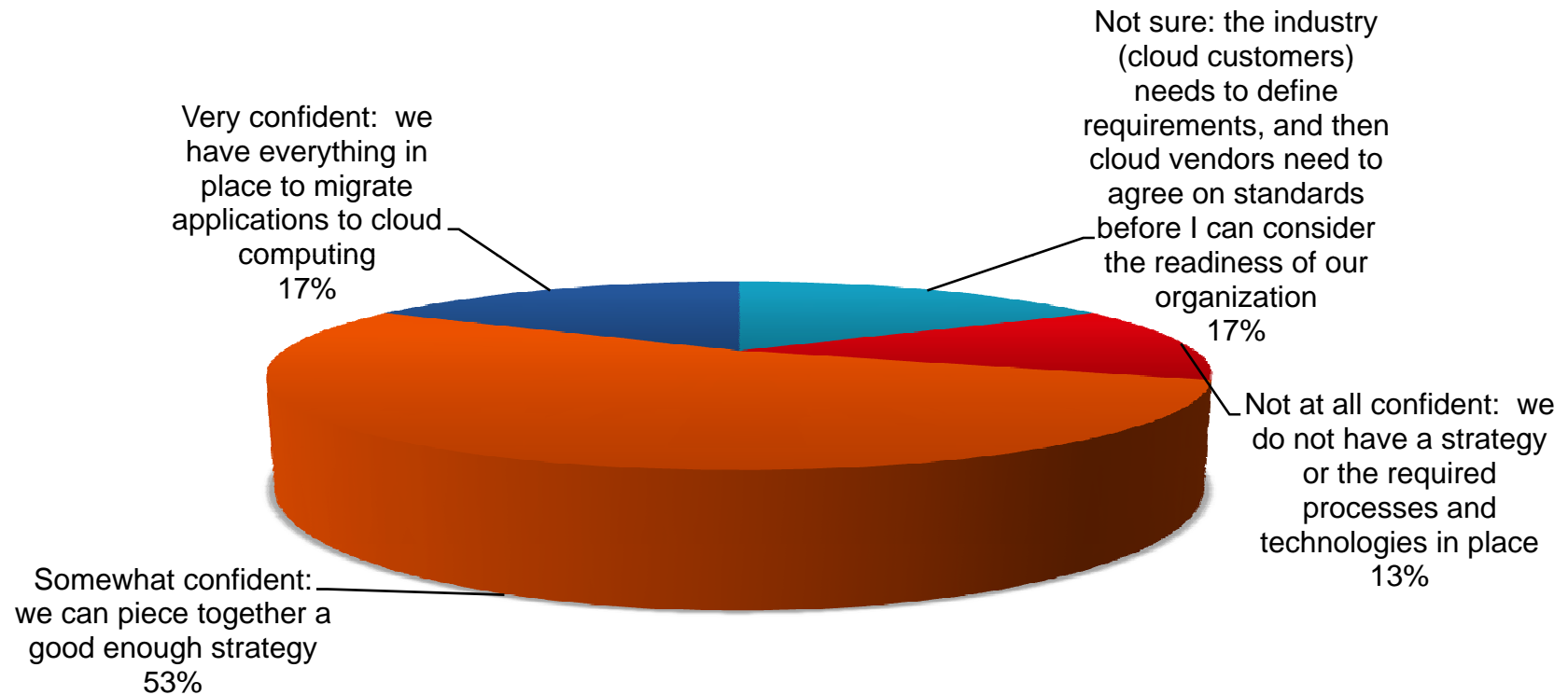
Q8: To what degree does your organization leverage shared infrastructure services provided by cloud computing vendors (e.g., Amazon) today? Base: 100 qualified respondents

Two-thirds of those who are running or planning to run applications/business processes in the cloud do not yet have a security strategy in place



Q9: Does your company have a security strategy in place for enterprise cloud computing? Base: 47 respondents whose organization does leverage shared infrastructure services provided by cloud computing vendors or have plans to migrate applications/business processes to the cloud in the next 12 months

The majority whose companies are operating/planning to operate in the cloud are “somewhat confident” in their companies’ readiness for widespread adoption of cloud computing



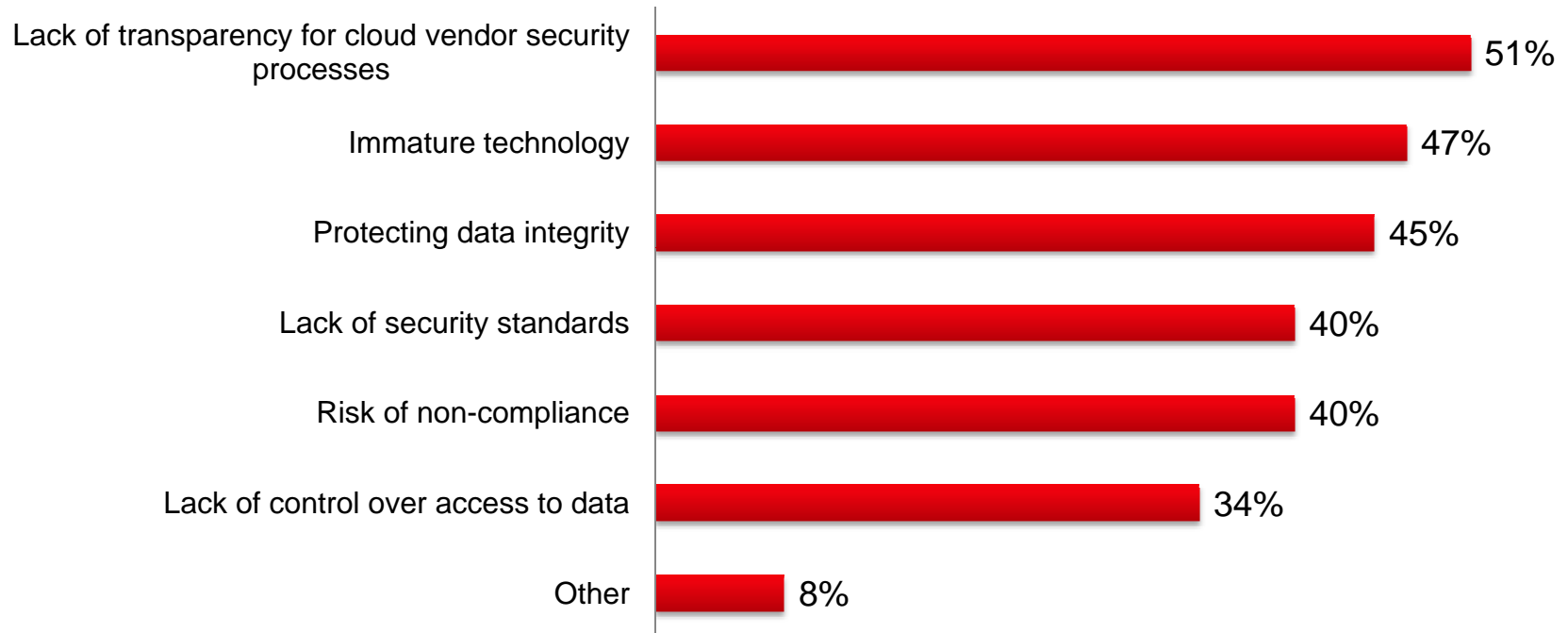
Q10: From a security perspective, how confident are you in your organization's readiness for the widespread adoption of cloud computing? Base: 47 respondents whose organization does leverage shared infrastructure services provided by cloud computing vendors or have plans to migrate applications/business processes to the cloud in the next 12 months.

More than half of the respondents with cloud computing plans agree that they are unclear how they will ensure the integrity or compliance of data

	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know
Potential cloud service providers that plan to process data from multiple enterprises have not clearly outlined how they will ensure the integrity of co-mingled data.	19%	34%	17%	23%	6%	-
Our enterprise security team is still unclear on how we will meet our compliance obligations once we move a business process to the cloud.	13%	38%	17%	19%	11%	2%
There is no way for our enterprise to know the geographic location of our data as it moves around the globe using available capacity in the public cloud.	15%	26%	19%	17%	21%	2%
Business units at my company have used cloud computing services without involving corporate IT/security.	6%	23%	15%	21%	32%	2%

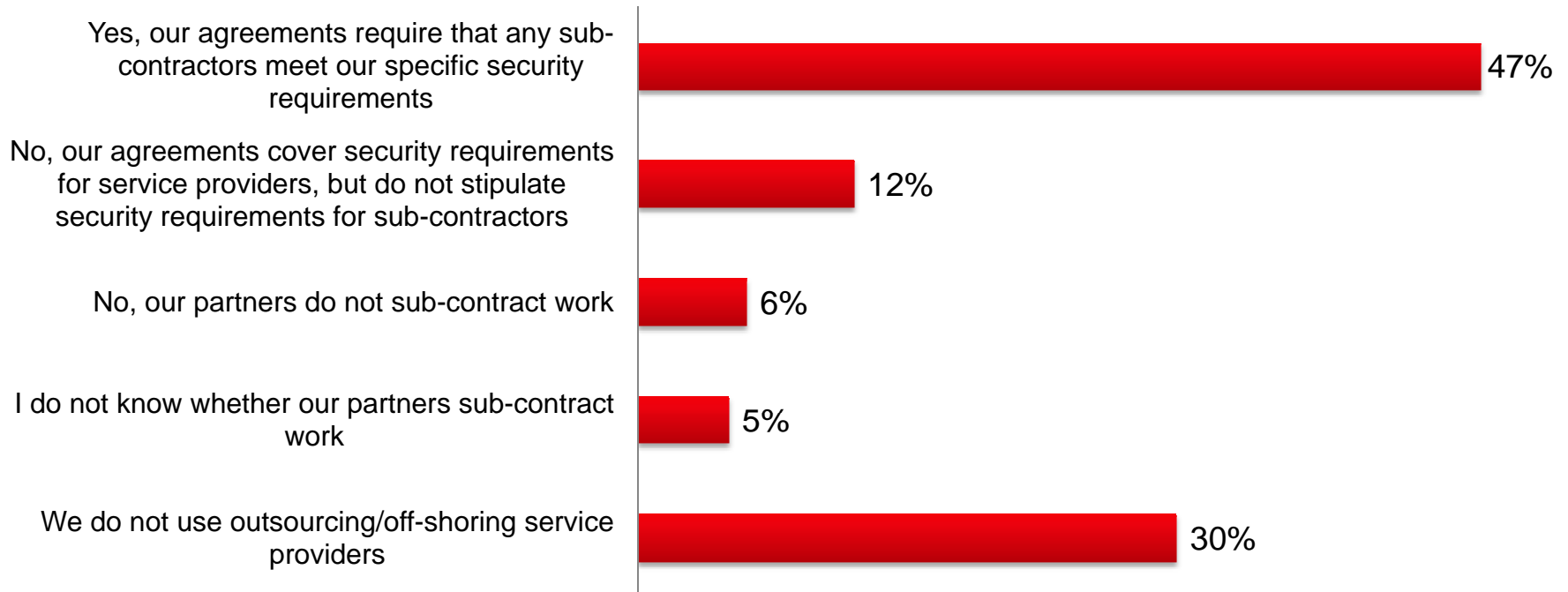
Q11: Please rate your level of agreement with the following statements regarding implementation of new cloud computing technologies at your company. Base: 47 respondents whose organization does leverage shared infrastructure services provided by cloud computing vendors or have plans to migrate applications/business processes to the cloud in the next 12 months 19

51% of those operating in/planning to migrate applications/processes to the cloud are concerned about a lack of transparency for cloud vendor security processes



Q12: Currently, what do you consider to be the biggest security issues with respect to using shared multi-enterprise resources in the cloud? (Please check all that apply.) Base: 47 respondents whose organization does leverage shared infrastructure services provided by cloud computing vendors or have plans to migrate applications/business processes to the cloud in the next 12 months

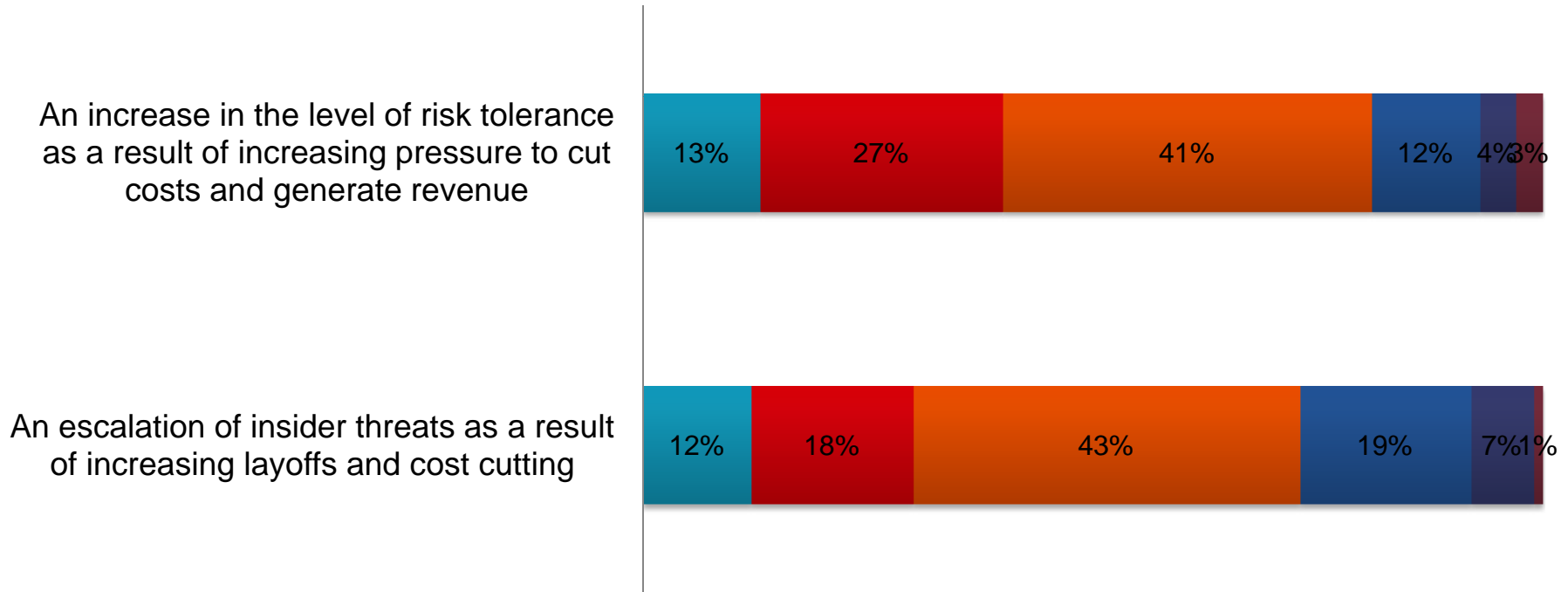
The majority of those who use outsourcing/off-shoring service providers report that their companies require that sub-contractors meet specific security requirements



Q13: Do your organization's business agreements with outsourcing or off-shoring service providers contain specific security requirements for the use of sub-contractors? Base: 100 qualified respondents

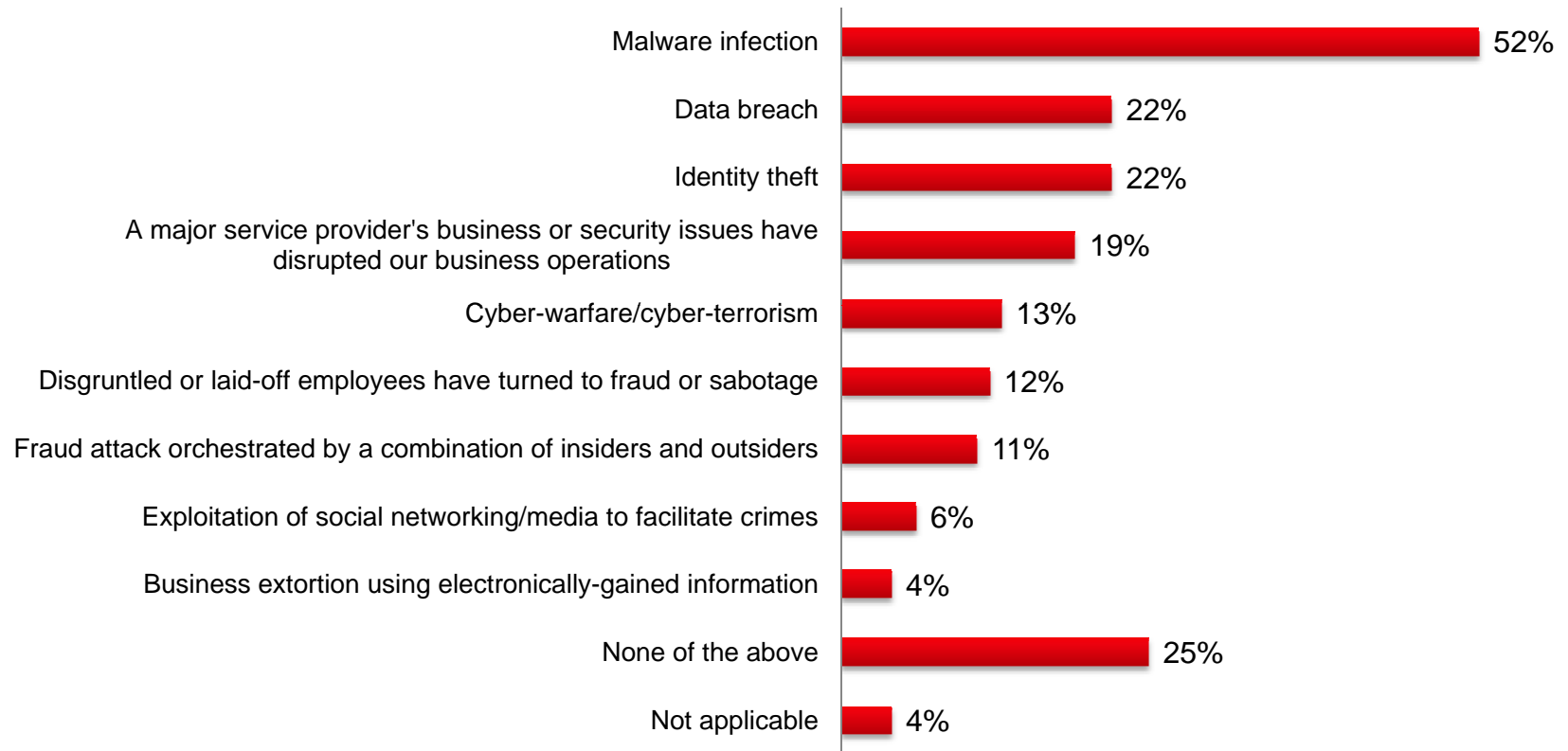
40% of all respondents are extremely or very concerned about an increase in the level of risk tolerance at their companies due to pressure to cut costs

■ Extremely concerned ■ Very concerned ■ Somewhat concerned ■ Not very concerned ■ Not at all concerned ■ Not applicable



Q14: Please rate your level of concern regarding the following within your enterprise: Base: 100 qualified respondents

More than seven out of ten respondents indicate their companies have experienced a security issue in the past 18 months



Q15: Which of the following security issues has your organization experienced in the past 18 months? (Please check all that apply.) Base: 100 qualified respondents

Respondents indicate a high level of agreement with statements regarding the need to change and improve upon the approach to enterprise security strategy

	Strongly Agree	Somewhat Agree	Neither Agree nor Disagree	Somewhat Disagree	Strongly Disagree	Don't know
Enterprise security professionals must collaborate across organizations, industry sections and governments to establish increased information sharing and consistent strategies to be successful.	51%	37%	9%	2%	-	1%
Security needs to shift the focus from protecting the container (i.e., the laptop/server, etc.) to protecting the data.	57%	30%	8%	3%	1%	1%
Organizations should move away from siloed approaches to security, and the information security department should deliver a set of centralized, high-quality services to their business customers.	48%	34%	12%	2%	1%	3%
Security strategies must evolve from a lock-down approach and focus on enabling businesses to be rapid, flexible and adaptive.	<b>39%</b>	40%	12%	6%	1%	2%
As the information security profession matures, we must begin to accredit security professionals in a similar way as professional engineers are accredited.	39%	37%	17%	4%	2%	1%

Q16: Please rate your level of agreement with the following statements regarding enterprise security practices. Base: 100 qualified respondents

## **IDG Research Services**

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