Fieldwork by Citrix

September 2021

The state of security in a hybrid world

Research conducted by Sapio Research

Study detail

OBJECTIVES

Deliver **qualitative + quantitative research** focused on the state of security in a hybrid work environment

SAMPLE

The survey was conducted among **4,853 security decision makers (1,250) and knowledge workers (3,603)** in companies with over 250 employees in the UK, France, Germany and the Netherlands and over 500 employees in the US

METHODOLOGY

The interviews were conducted online in **September 2021** using an email invitation and an online survey.

At an overall level results are accurate to **± 1.4%** at 95% confidence limits assuming a result of 50%.

Informing the quantitative research was a series of **CISO interviews** (12). Verbatims from those interviews are integrated throughout the report

Key findings

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Over half of global businesses have reimagined their businesses

Offices have evolved into transient spaces. And it isn't just that their workforce is more distributed. The old security perimeter is gone; data and assets are now scattered everywhere

Work from anywhere is here to stay

52% of security decision makers believe most of their workforce will be permanently remote or hybrid. 59% of knowledge workers also agree

Initial security struggles give way to steady focus

Only 46% of US + Europe businesses felt "somewhat prepared" for remote work. 74% say security procedures and controls have become more complex and 73% have struggled with the increased volume of security events. That said, 79% say the pandemic has created an opportunity to completely rethink their long-term information security strategy

Technology response has been swift

58% say investments to security have increased and 74% feel more secure today than before the pandemic. Looking forward, 84% feel very or somewhat prepared to secure a hybrid, remote or at-home workforce long-term

Key findings

Security and the employee experience can't be separated

The employee experience remains central to global businesses. 86% of security decision makers rate providing a seamless employee experience remotely as extremely or very important. 94% regularly ask how they can improve

New protocols enhanced employee experience and increased productivity

91% say new security protocols have enhanced or have had no impact on the employee experience. 90% say productivity has increased or no impact

Knowledge workers embrace notion of security as shared responsibility

90% agree that security is a shared responsibility. As a testament to improvements made to the employee experience, only 27% of knowledge workers find security protocols difficult to understand and only 30% struggle to remember complex security procedures

Role of CISO shifting

The importance of the CISO has soared. 72% say the CISO has officially become part of the C-suite. CISOs are more integrated into business operations (81%) and are more viewed as business enablers (78%)

86%

Rate providing a seamless employee experience as important

94%

Regularly poll employees for feedback on how to improve

91%

Say new security protocols have enhanced or have had no impact on employee experience

90%

Say new security protocols have enhanced or have had no impact on productivity

Security decision makers – base 1250

Level of pandemic preparedness

“It was like changing an engine on a plane whilst it was in flight”

Most global businesses **initially struggled** to support a remote workforce at the beginning of the pandemic.

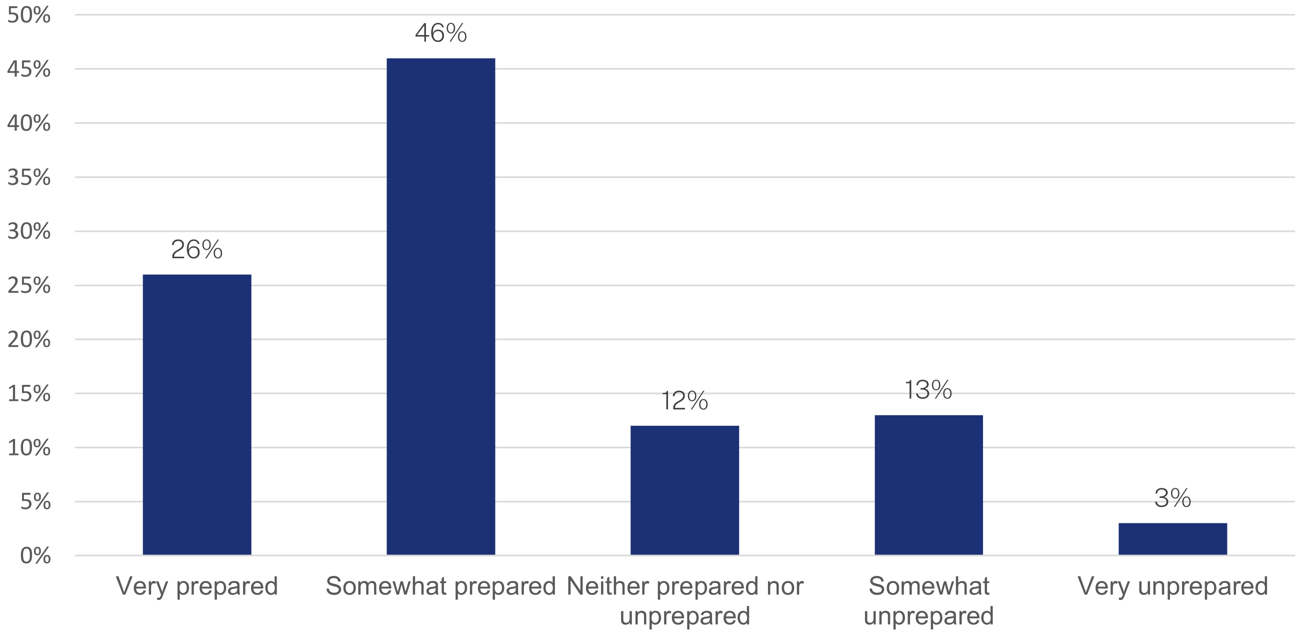
Globally, only 26% of security decision makers were “very prepared”; 46% were “somewhat prepared”

Least prepared:

- Netherlands, 18% “very prepared”

Most prepared:

- Germany, 29% “very prepared”



Q: At the start of the pandemic, how prepared was your company’s information security systems and controls to support a remote or work from home workforce? Select one.

Base security decision makers: 1250

“It was a wake-up call for how unprepared we were. We were relying on old technologies for VPN, and it could not handle all our employees logging in at the same time”

Security decision makers: remote work created more “noise” in the system, greater complexity

73%

Felt the volume of security events and data to process has increased significantly

74%

Say information security procedures, systems and controls have become more complex

73%

Expect information security teams must tolerate a higher level of acceptable risk in a hybrid, work-from-anywhere environment

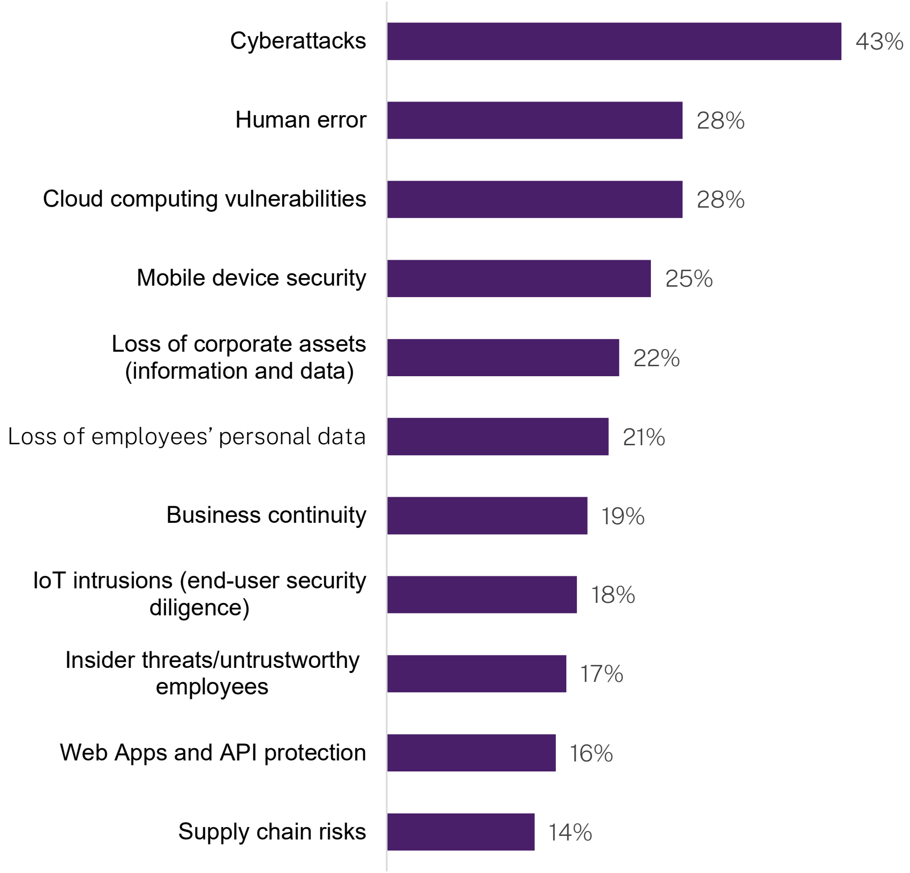
Base: Security decision maker respondents (1250)

"I used to know where my crown jewels were"

With the perimeter gone, corporate data and assets are now scattered across the cloud and endpoints.

Cyberattacks (43%), human error (28%) and cloud vulnerabilities (28%) emerged as the top threats.

- As the boundaries between work and personal life dissolved, the human element became an even stronger threat
- Human error highest threat in Government at 40%



Q: What are the threats your company is most concerned about when securing a hybrid, remote or from home workforce? Select up to three.

Base security decision makers: 1250

The disruption also served as a catalyst for change for security teams

79%

of security decision makers say the pandemic created an opportunity to completely rethink their long-term information security strategy, beyond COVID-19

The future of work: reimagining the “office”

“Our office in essence is like a coffee shop, you come to our office to get internet and be with your co-workers”

Even before the pandemic, remote work was pervasive. The pandemic only accelerated and cemented this trend. Work from anywhere is here to stay.

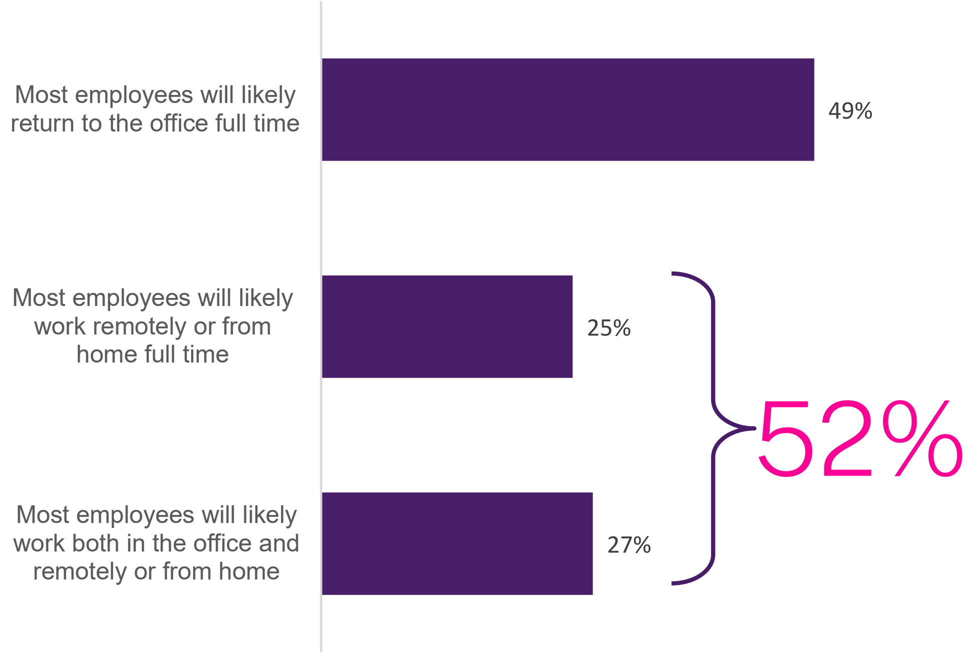
Globally, 52% of security decision makers expect most of their workforce to work remote or hybrid permanently.

Highest:

- Netherlands, 60% expect most employees will work remotely or hybrid

Lowest:

- US, 46% expect most employees will work remotely or hybrid



Q: What do you expect the future of work to look like for your company long-term or permanently? Select one.

Base security decision makers: 1250

Knowledge workers agree at a higher percentage

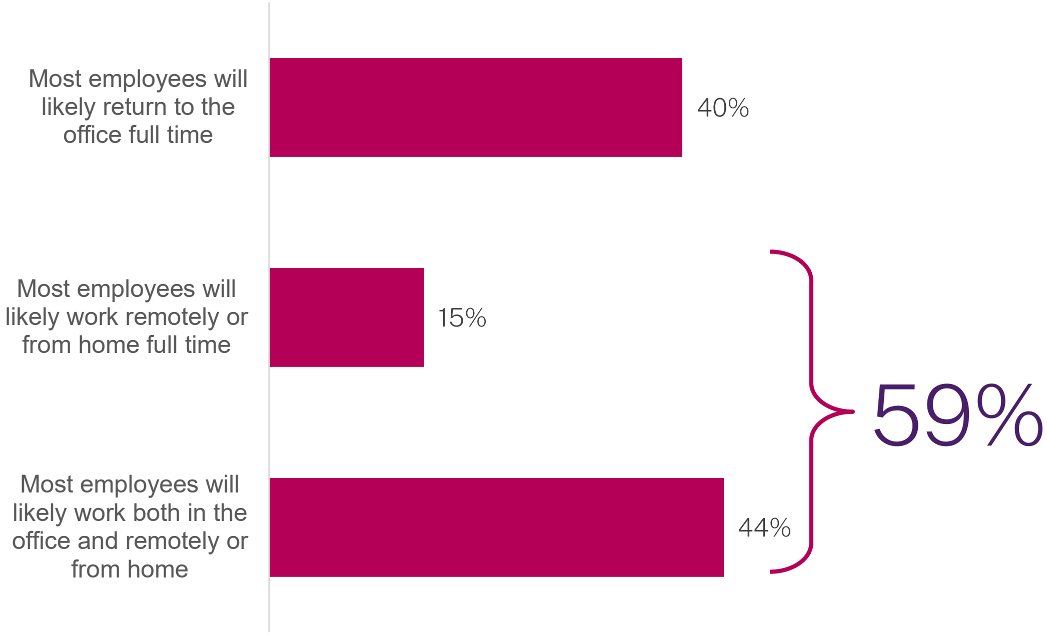
Globally, 59% of knowledge workers expect most of their workforce to work remote or hybrid permanently

Highest:

- UK, 68% expect most employees will work remotely or hybrid

Lowest:

- France, 45% expect most employees will work remotely or hybrid



Q: What do you expect the future of work to look like for your company long-term or permanently? Select one.

Base knowledge workers: 3603

Remote working is essential to knowledge workers

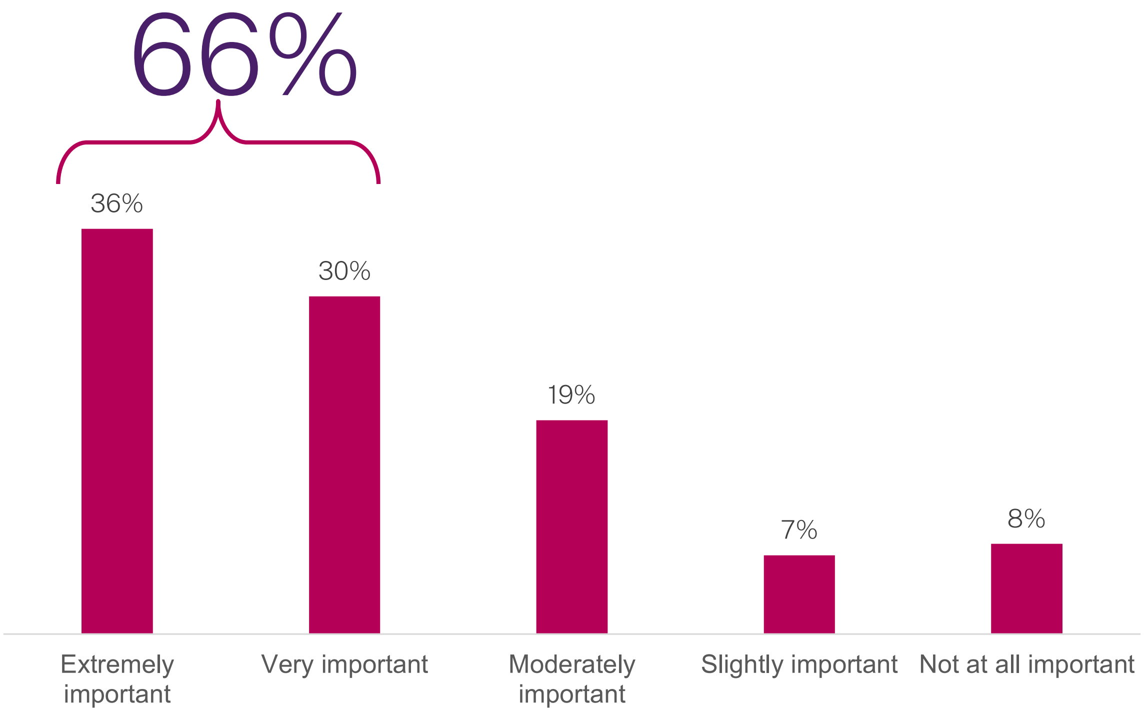
Two thirds of knowledge workers say it is very important to them that they are able to work remotely or from home, on any device, in the future (66%)

Highest:

- UK, 70% say very important

Lowest:

- Germany, 60% say very important



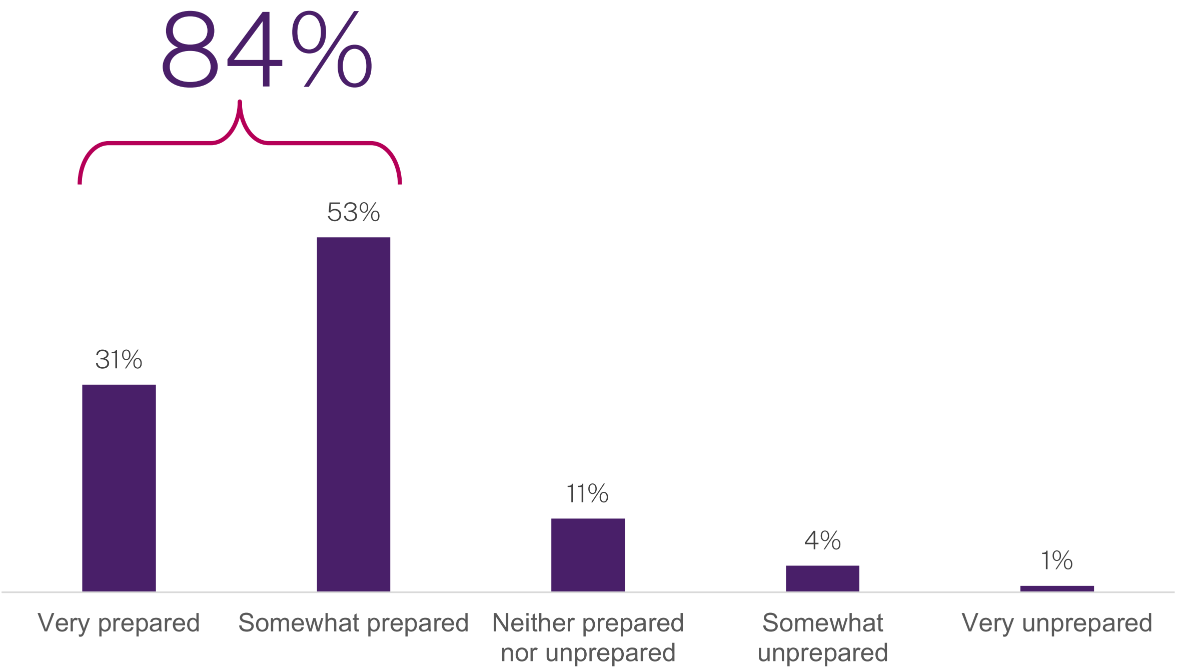
Q: How important is it to you that you are able to work remotely or from home, on any device, in the future? Select one.

Base knowledge workers: 3603

Security decision makers **more prepared** for the future

Most have recalibrated security priorities and feel more prepared about the future

Over 4 in 5 (84%) of those expecting remote or hybrid work to continue for the rest of this year or long term say their company's information security systems are prepared to secure this workforce long term



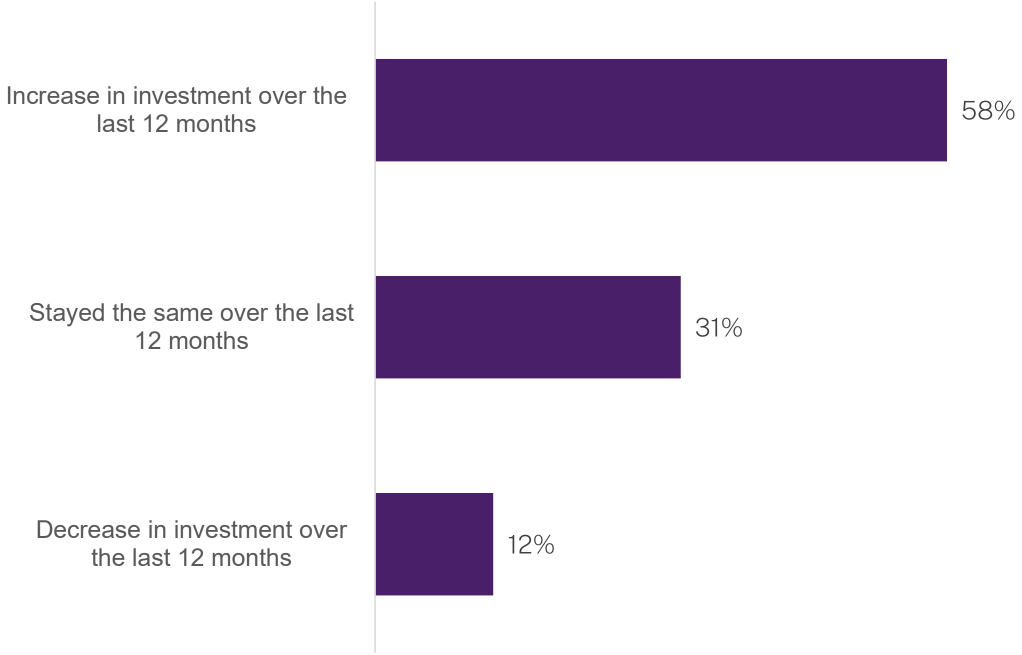
Q: How prepared is your company's information security systems and controls today to secure a hybrid, remote or from home workforce long term? Select one.

Base security decision makers: 834 – Only those who will have a hybrid or remote workforce for the rest of this year or long term

“It was a matter of survival”

This perception of preparedness is linked to the increased investments they have made to security.

- Almost 3 in 5 (58%) have increased investment in information security over the last twelve months by an average of 40%
- Additionally, 76% felt their customers were expecting increased security protocols/audits (in addition to their own security, validating their supply chain/vendors)



Q: Over the last 12 months, how has the level of investment in information security changed at your company? Select one. / Q4a. How much has investment increased? Q4b. How much has investment decreased?

Base security decision makers: 1250 / 719 (Q4a) / 149 (Q4b)

As a result, most feel more secure today than before the pandemic

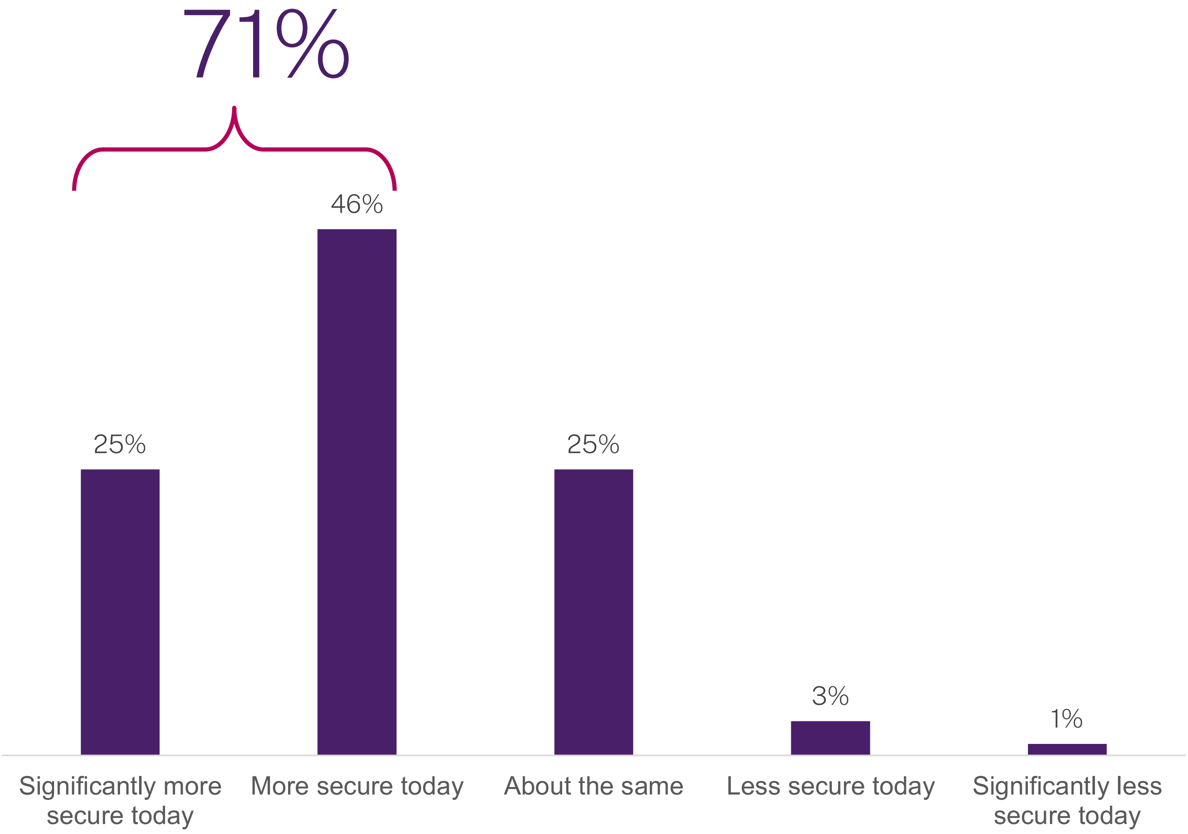
71% say their company's IT environment is more secure than it was before COVID

Highest:

- US, 79% say more secure

Lowest:

- Germany, 58% say more secure



Q: Overall, how secure is your company's IT environment currently compared to before COVID-19? Select one.

Base security decision makers: 1250

Technology response prioritizes endpoints and human error

The top three information security protocols companies have prioritized to better secure remote and hybrid workforces are **multi-factor authentication**, **additional employee education** and **cloud/SAAS use visibility/control/security** (all 28%)

App delivery and security at 19% globally

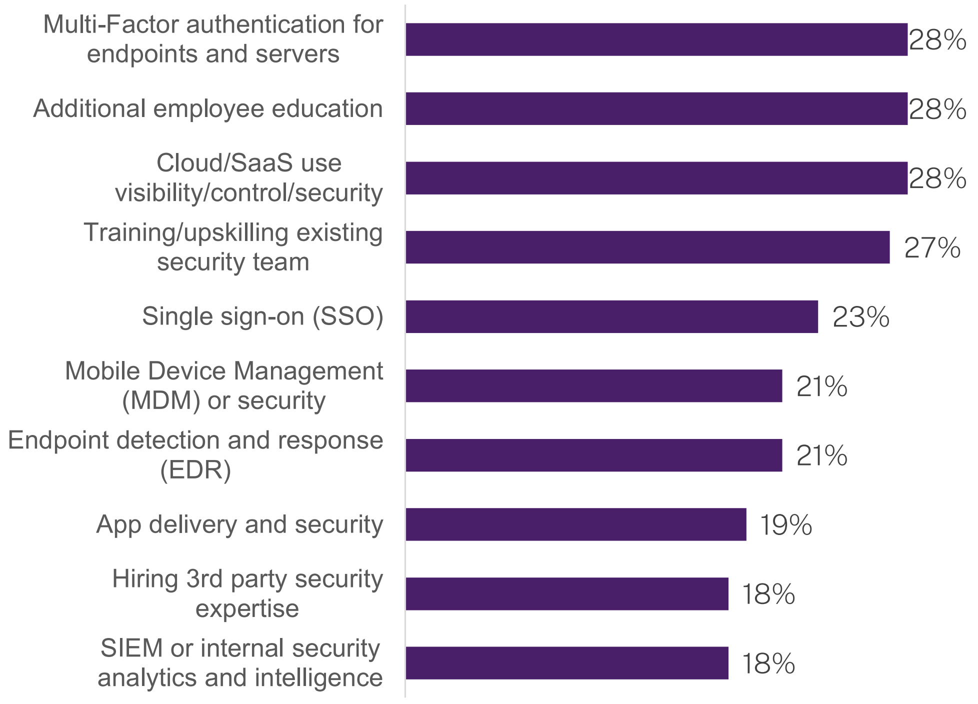
Highest:

- UK, 22% say prioritized

Lowest:

- Netherlands, 15% say prioritized

Showing top ten



Q: What information security protocols has your company prioritized to better secure a hybrid, remote or from home workforce? Select up to five.

Base security decision makers: 1250

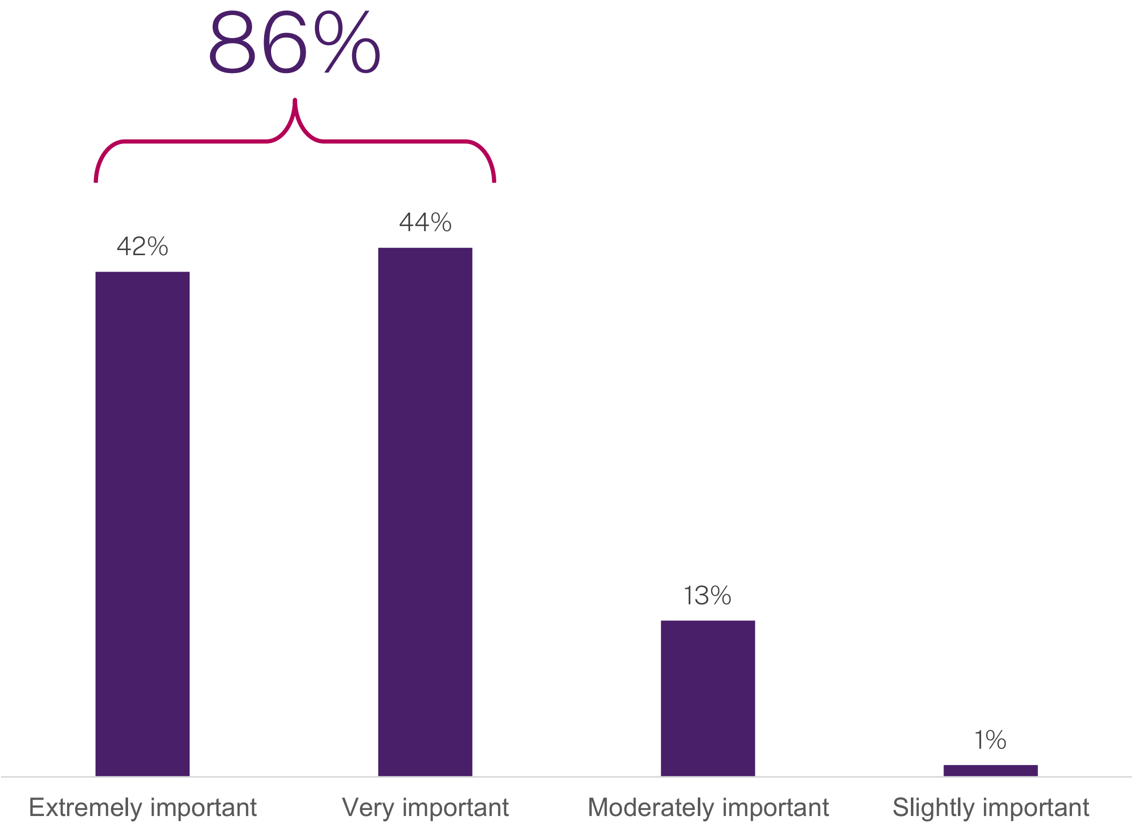
The employee experience

Security and employee experience can’t be separated

Security decision makers understand they must preserve a seamless employee experience whilst adding layers of security.

Whilst there is often a balance between experience and security risk, experience often trumps the risk. 86% say it is extremely or very important to create a seamless employee experience.

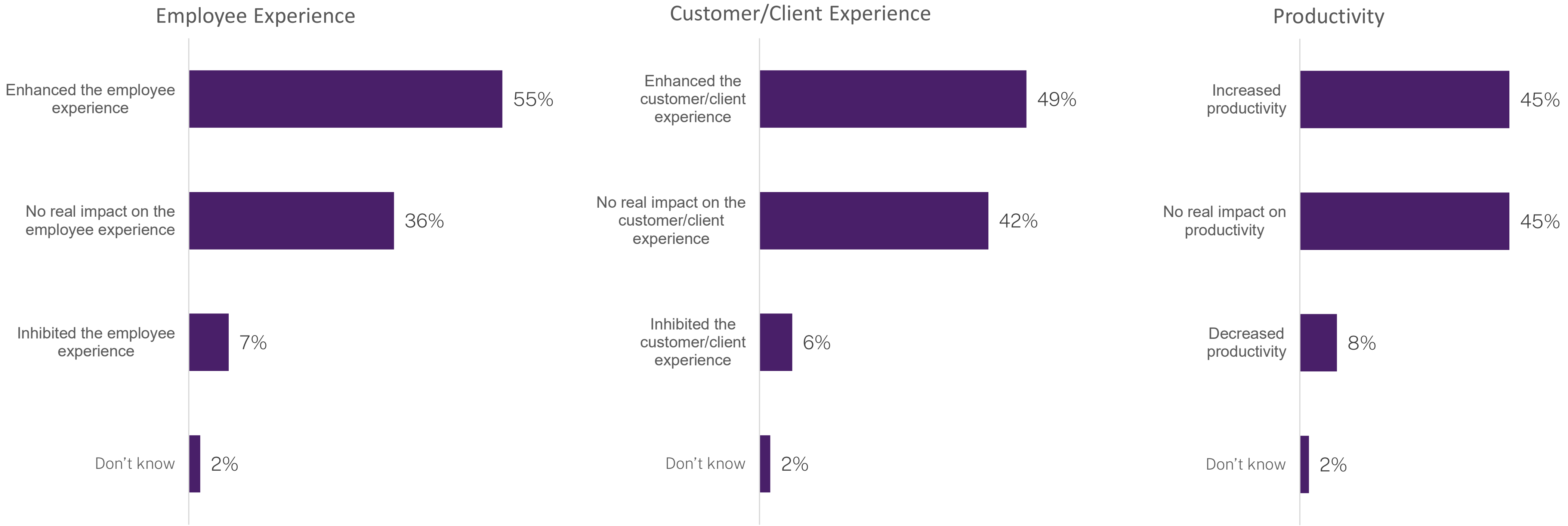
Enhancements to security often have the added benefit of simplifying an experience, such as single sign-on.



Q: How important is it to your company to create a seamless employee experience when working remote or from home, on any device? Select one.

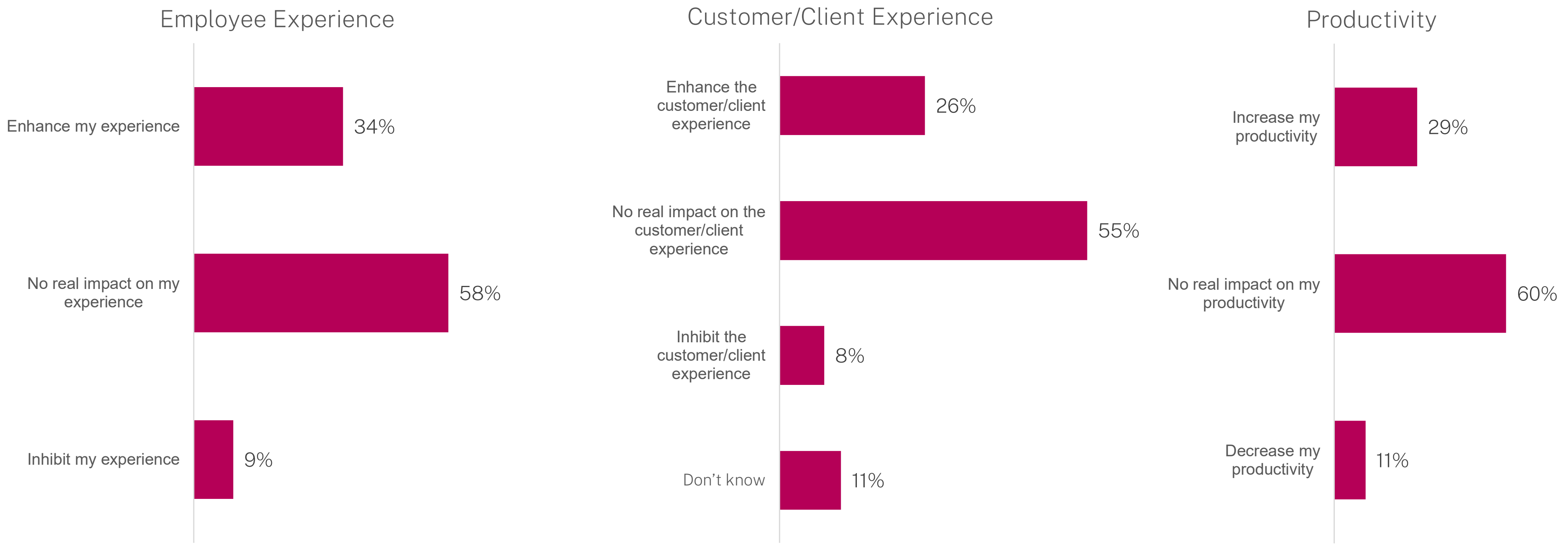
Base security decision makers: 1250

The security decision maker perspective: the majority say new security protocols have either enhanced or had no impact on employee experience, customer/client experience and productivity



Q: How have new security protocols impacted the employee experience? Select one / Q9b. How have new security protocols impacted the customer/client experience? Select one / Q9c. How have new security protocols impacted productivity? Select one. Base security decision makers: 1250

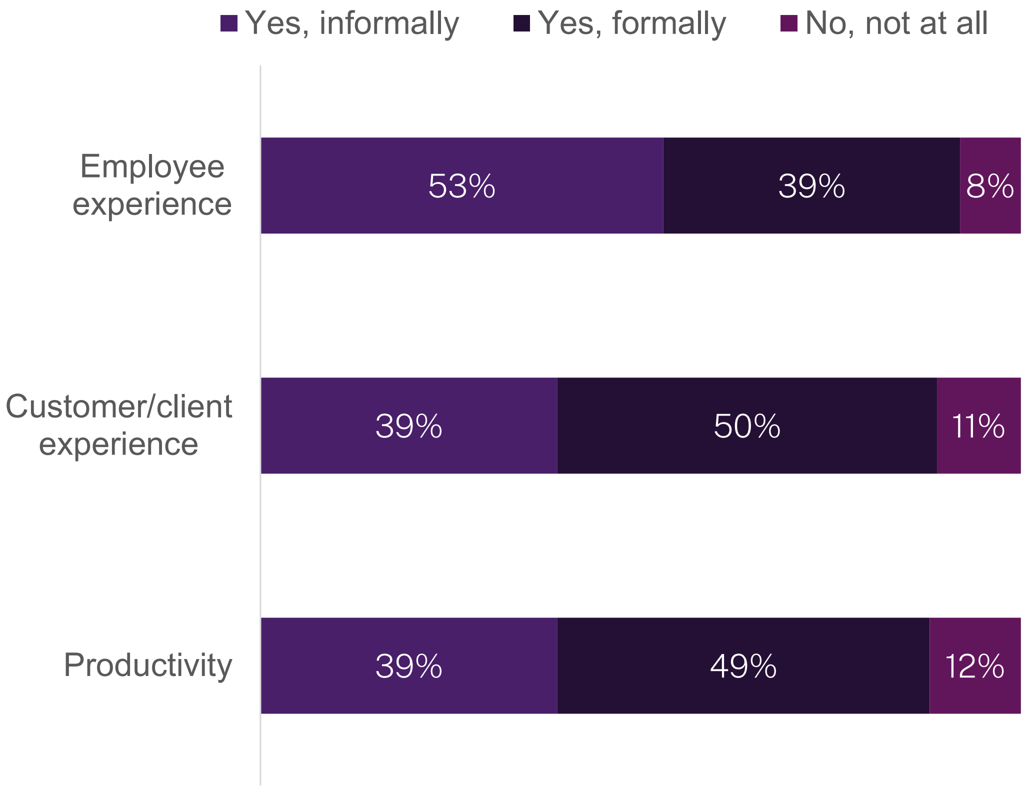
Knowledge workers perspective: More likely to say that security protocols have no impact on their experience and productivity, and the customer/client experience, and less likely to say they enhance them



Q: When working from anywhere, on any device, how do IT security protocols currently impact the employee experience? Select one / Q18b. When working from anywhere, on any device, how do IT security protocols currently impact the customer/client experience? Select one / Q18c. When working from anywhere, on any device, how do IT security protocols currently impact your productivity? Select one . Base knowledge workers: 3603

Most security decision makers actively measuring security’s performance

- Around 9 in 10 measure information security’s impact on employee experience, customer/client experience and productivity, but only half or less than half do so formally.

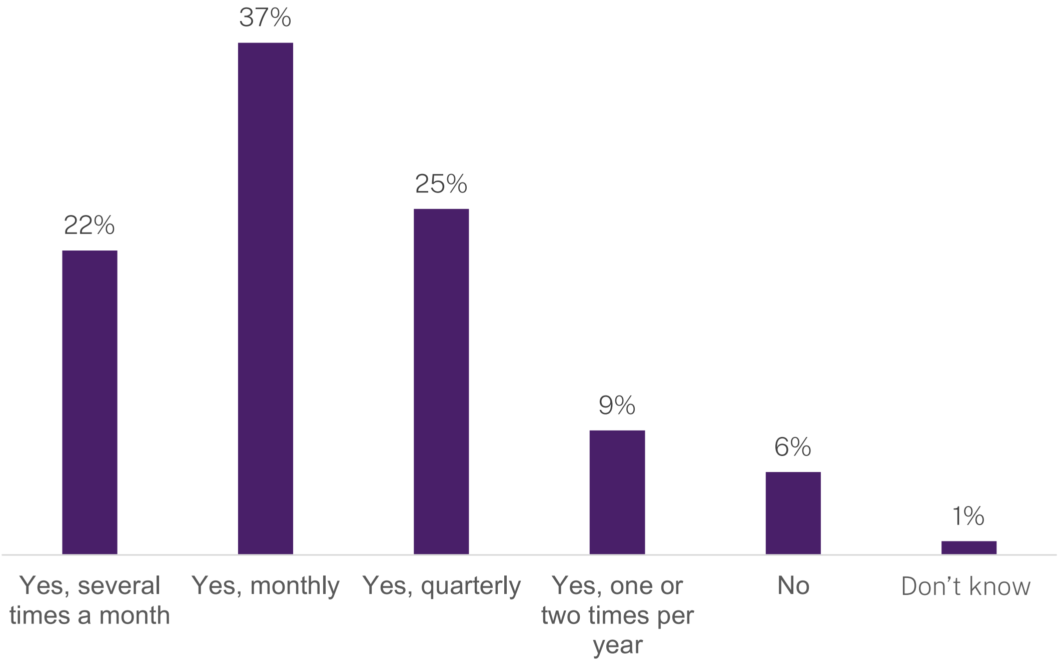


Q: Are you actively measuring information security’s impact on the employee experience, customer/client experience and productivity? Select one per row.

Base security decision makers: 1250

Relatively frequent cadence of feedback

- 94% of security decision makers say their company's IT/security team regularly asks employees for feedback.
- A fifth (22%) say they do so several times a month, while 37% do so monthly.

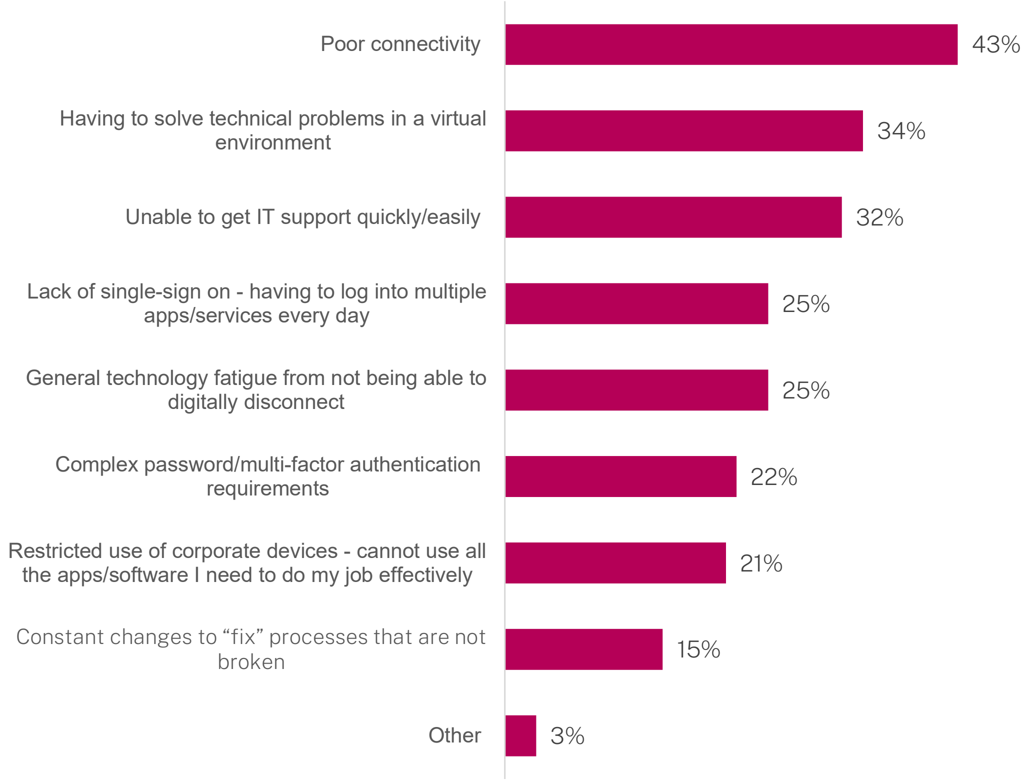


Q: Does your company's IT/security team regularly ask employees for feedback on how to improve? Select one. Base security decision makers: 1250

Connectivity greatest challenge from knowledge worker perspective

The top three challenges to hybrid/anywhere working, according to end users:

1. poor connectivity (43%)
2. having to solve technical problems virtually (34%)
3. the inability to get IT support quickly/easily (32%)



Q: What are the most significant challenges to hybrid/anywhere working right now? Select up to three. Base knowledge workers: 3603

Knowledge workers cite minimizing changes/disruptions as biggest area for improvement

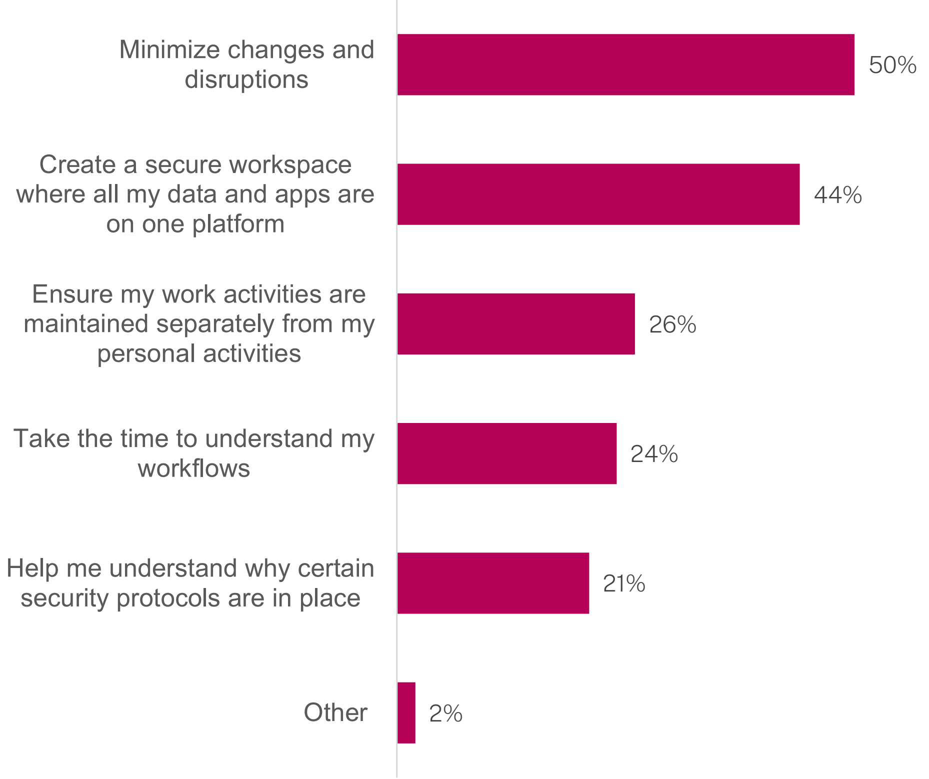
Knowledge workers say their company's IT security team could help them perform their best work when working remotely by minimizing changes and disruptions (50%) and creating a secure workspace where all their data and apps are on one platform (44%)

Highest:

- France, 51% say creating a secure workspace for data and apps

Lowest:

- UK, 38% say creating a secure workspace for data and apps

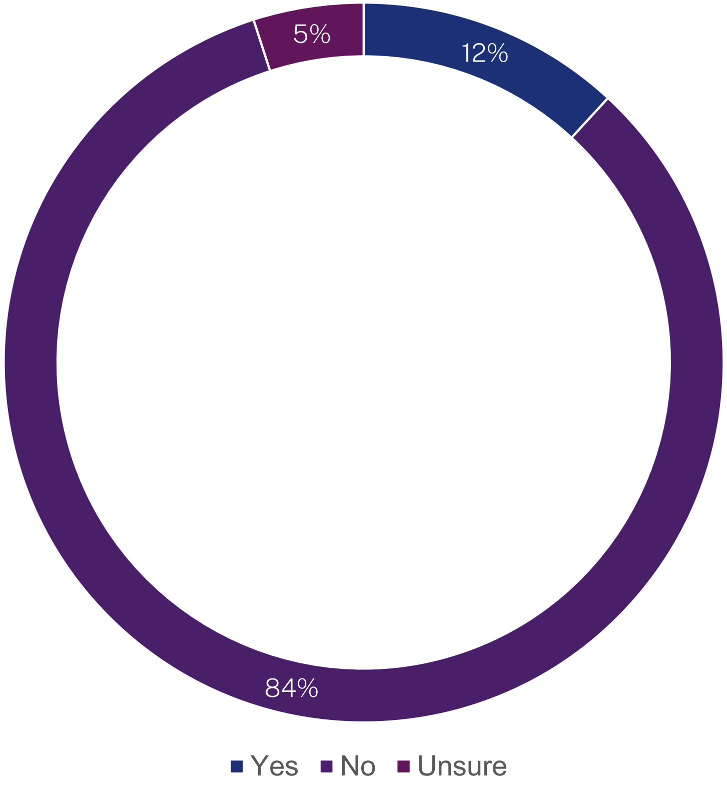


Q: What could your company's IT security team improve to help you perform your best work when working remotely or from home, on any device? Select all that apply. Base knowledge workers: 3603

Few knowledge workers have been challenged by IT

12%

Very few, 1 in 10 (12%) say their company's IT/security team has contacted them or blocked access due to logging on from an unusual location



Q: Has your company's IT/security team ever contacted you or blocked access due to logging on from an unusual location? Select one. Base knowledge workers: 3603

Knowledge workers may help drive password-less future

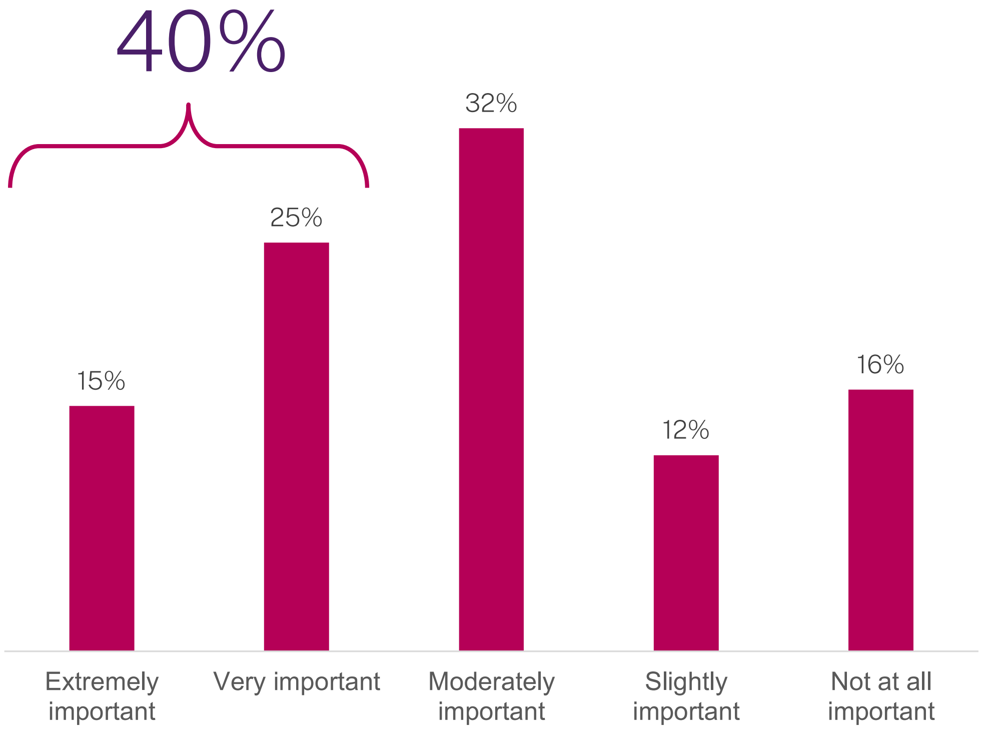
2 in 5 say a password-less environment is very important to them (40%), while a further 32% say it is moderately important

Highest:

- France, 45% say important

Lowest:

- Netherlands, 36% say important



Q: How important to you is a passwordless environment? (A way to authenticate without the need for passwords, or to remember passwords. For example, securing identity through your mobile device or hardware token.) Select one. Base knowledge workers: 3603

Security *is* a shared responsibility

“Everyone is in security”

85%

Security decision makers agree that security is a shared responsibility

90%

Knowledge workers agree security is a shared responsibility

Q: Please rate how much you agree or disagree with the following statements. Security DMs Base: 1250
Knowledge Workers Base: 3603

Risk awareness relatively high from both perspectives

73%

Security decision makers believe the workforce is aware of potential security risks

64%

Knowledge workers believe they are aware of potential security risks

Q: How would you rate your employees' awareness of potential security risks when working remote or from home, on any device? Select one. Base: 1250 How would you rate your awareness of potential security risks when working remotely or from home, on any device? Select one. Base: 3603

Solid progress toward making security work for knowledge workers and the organization

27%

Find security protocols difficult to understand

37%

Would rather not think about security at all

30%

Struggle to remember complex security procedures

Base: knowledge workers (3603)

Role of CISO is evolving

“I have never spent so much time in the boardroom”

Rapid rise in status over the last year

Officially part of the C-suite, with a permanent seat at the table

CISOs expand competencies beyond the technical

CISOs must work across all the traditional functional silos of the enterprise and coordinate with every information and data stakeholder

Viewed as a business enabler and less as an enforcer

Where in the past they were viewed as the “department of no,” they are now viewed more favorably and consulted on key business decisions, particularly in the wake of accelerated digital transformation initiatives

Q: To what degree is the role of security evolving? For each statement below, rate how much you agree or disagree Select one per row. Base security decision makers: 1250

66%

Information security teams often report to CIOs but should report to CEOs

72%

CISOs are officially becoming part of the C-suite

81%

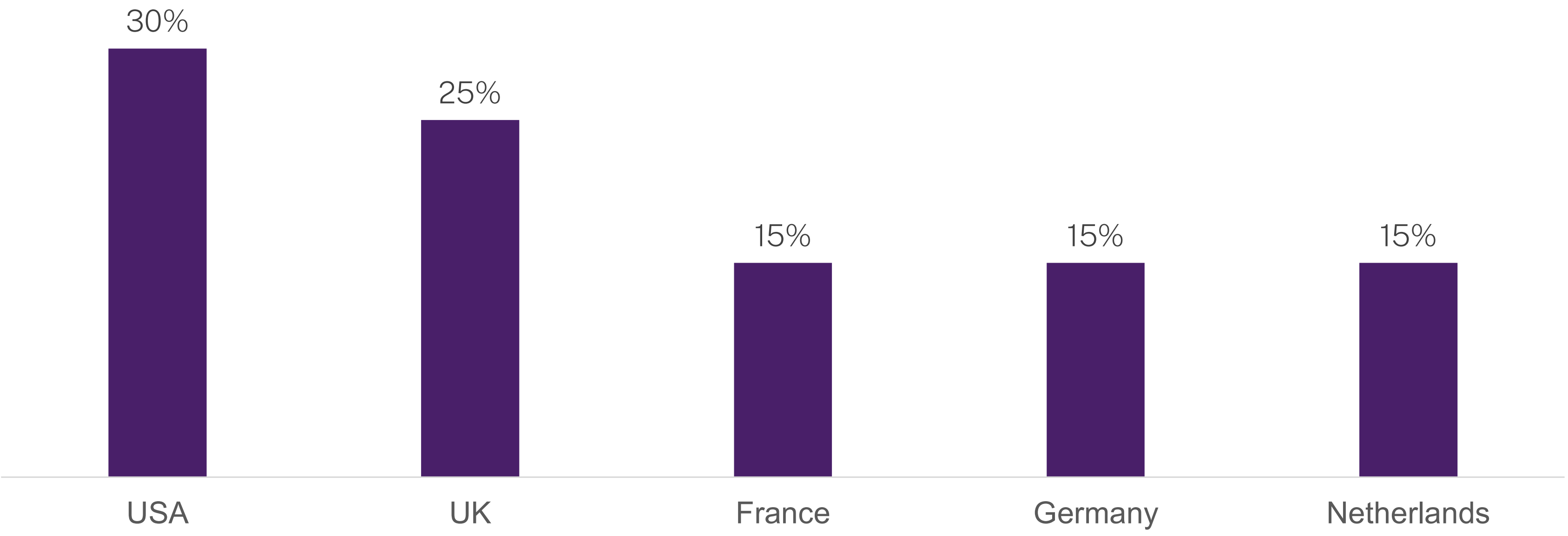
Information security teams are more integrated into business operations

78%

Information security has become more of a business enabler

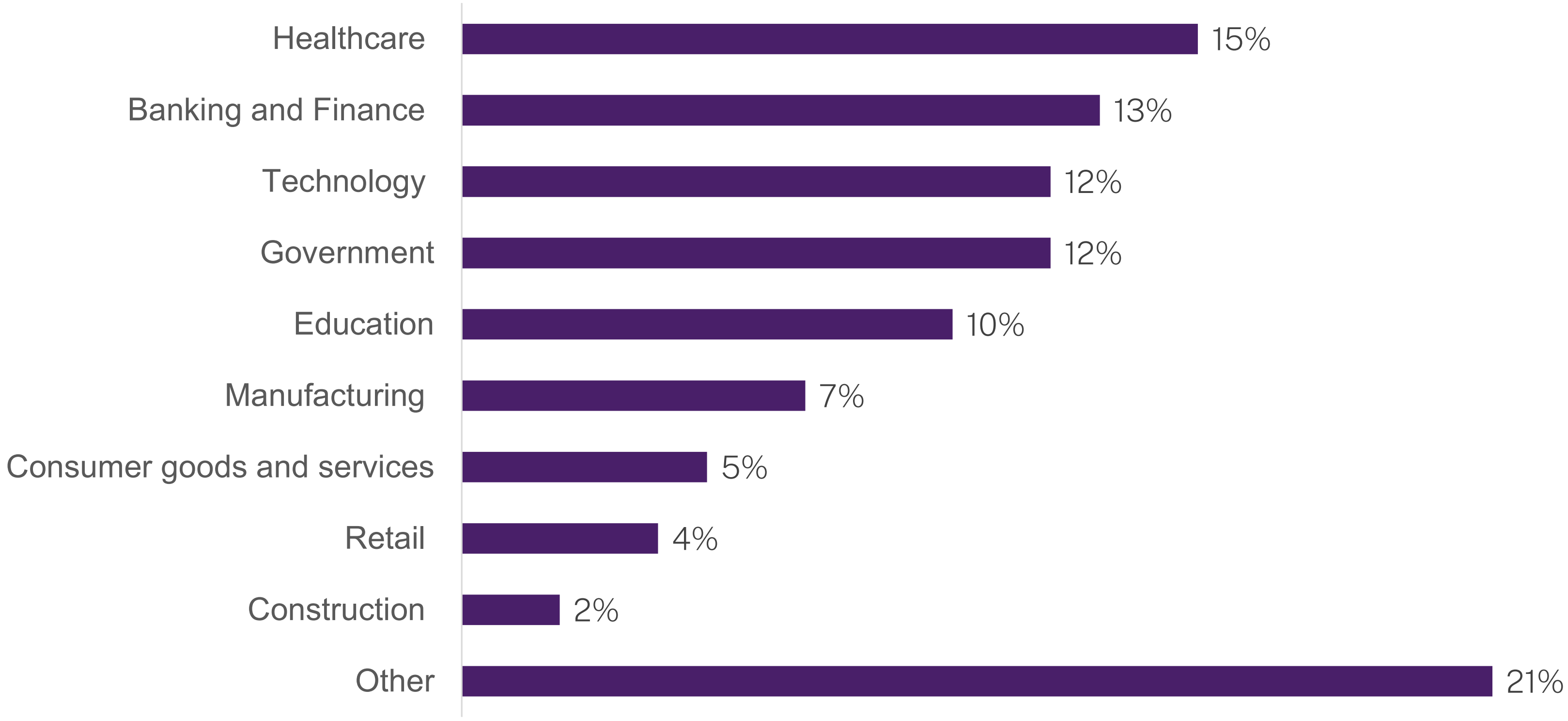
Sample profile

Country



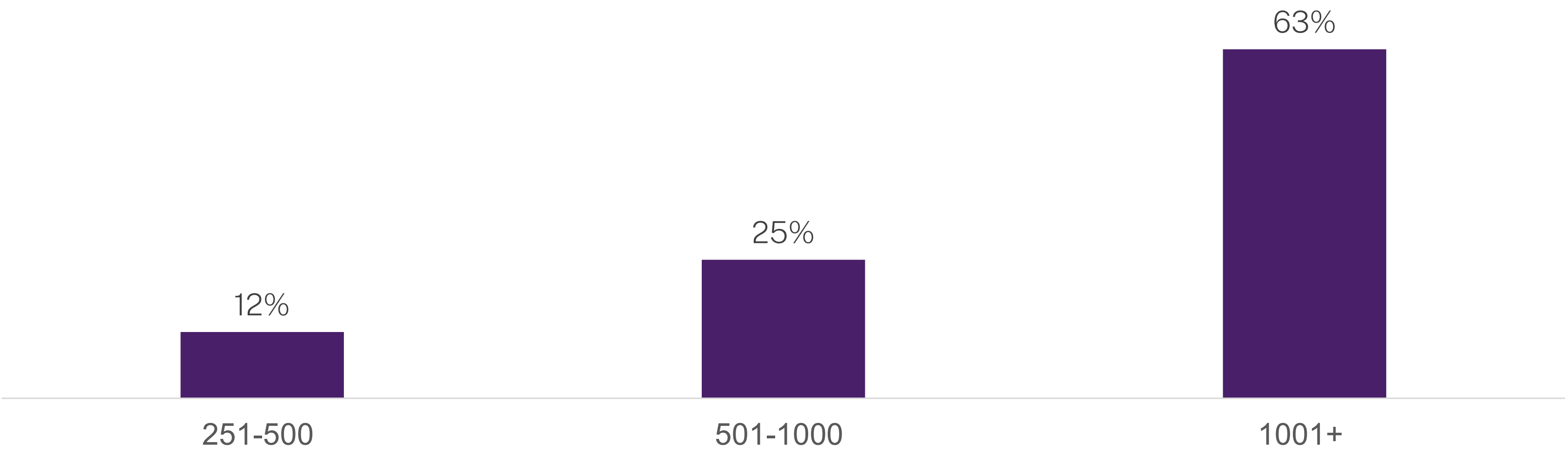
S0. In which country do you live? Select one. Base: 4853

Industry



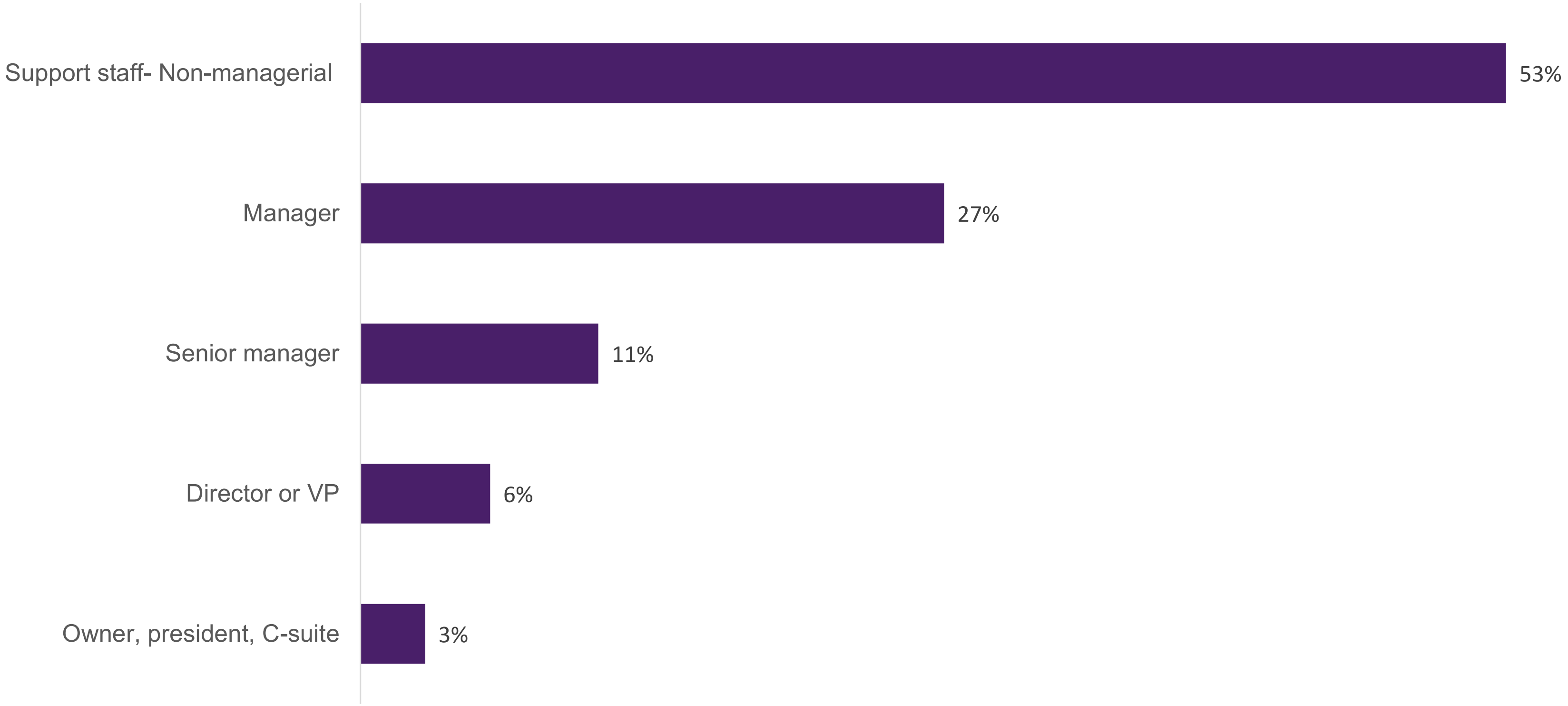
S1. What industry do you work in? Select one. Base: 4853

Company size



S2. Approximately how many employees are at your company, across all locations? Select one. Base: 4853

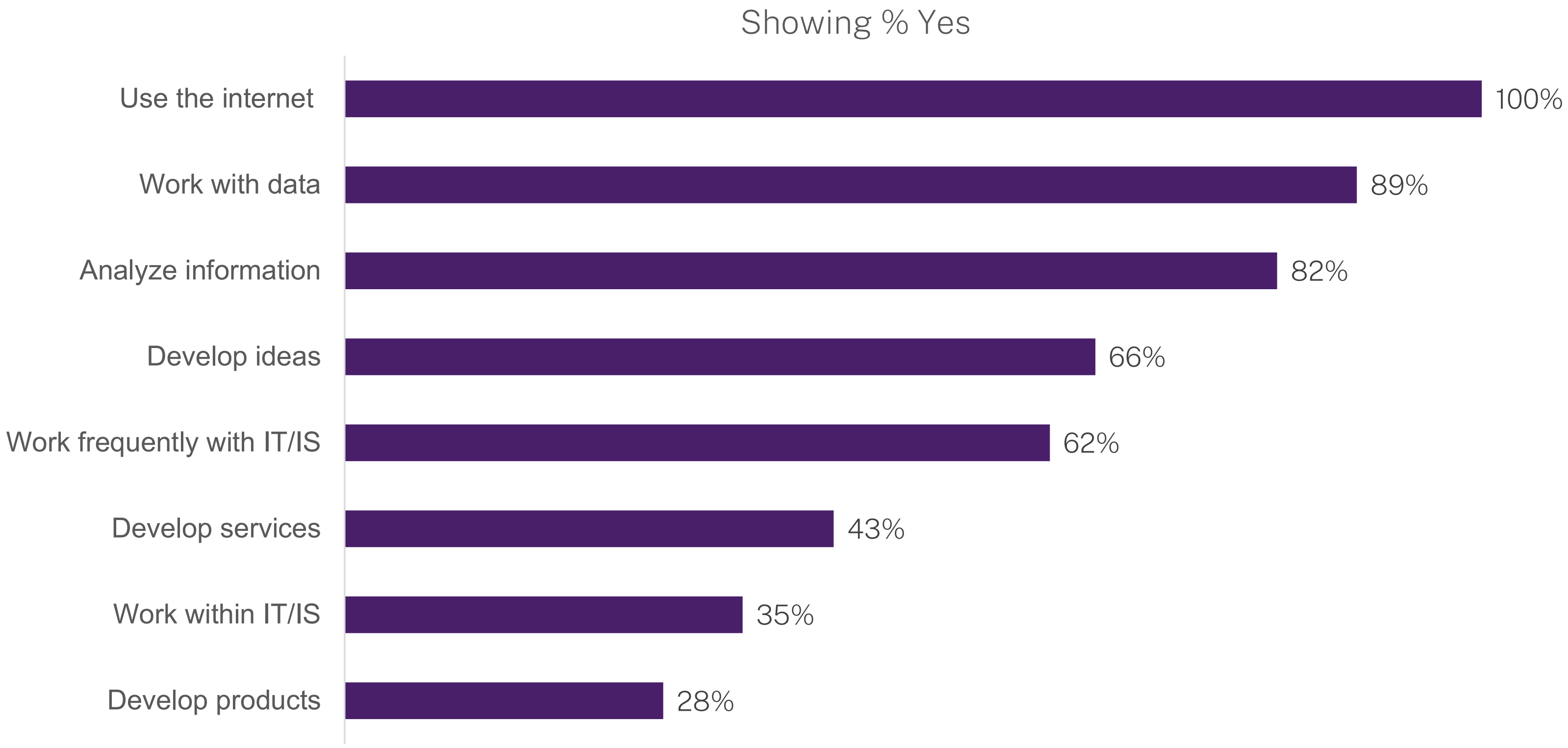
Role



Knowledge workers only

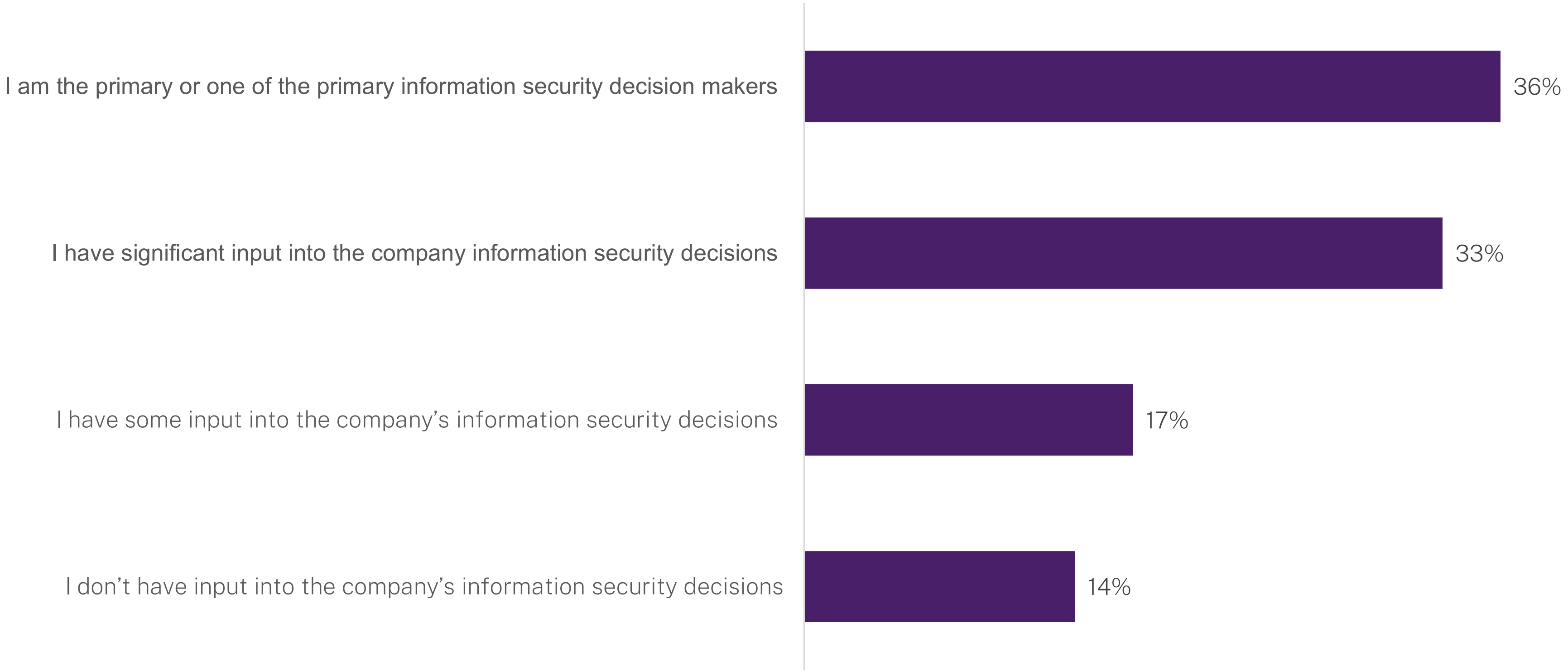
S3. Which of the following best describes your role at your current company? Select one. Base: 4853

Key behaviours



S5. In your role, do you...? Select one per row. Base: 4853

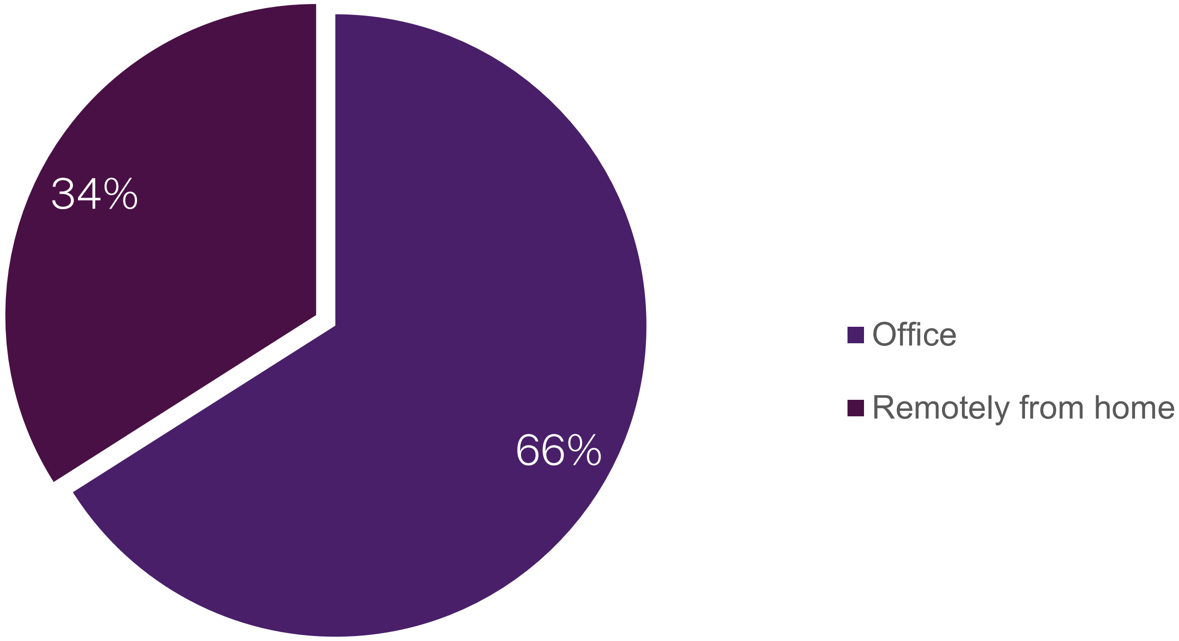
Decision making abilities



S6. How involved are you in making information security decisions at your company? Select one. Base: 1802*

*Only asked to manager and above working within or frequently with IT

Decision making abilities



S4. In what type of setting do you typically work? Select one. Base: 4853

Fieldwork by Citrix

September 2021

Thank you

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