



A Quick Look at the 2013

## Global State of Information Security® Survey

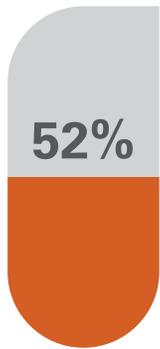
While most professionals (70%) felt confident in their IT security, few could be considered information security leaders.



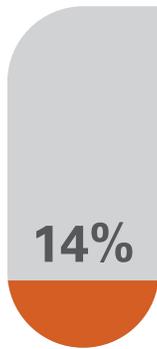
### Key Points of Interest

- Only 8% could be considered to be true, information security leaders
- Less than half employed a CISO or equivalent
- Only 30% aligned security spending with their business goals.
- True information security leaders implemented a comprehensive risk-assessment strategy and fully understood the value of the organization's information

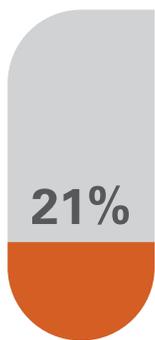
For many businesses, solid information security seems to be an impossible pursuit. As breach techniques become more and more advanced, so must the practices of those with an interest in protecting their company's assets. The Global State of Information Security® Survey 2013 surveyed industry professionals to get a clear picture of the current information security landscape. The survey found some interesting details regarding where the industry thinks it is, where it actually is and where it's heading.



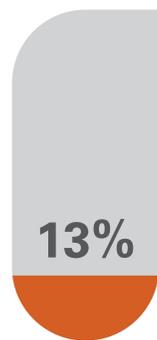
Members of IT Industry



CIOs, CSOs, CTOs, CISOs



CEOs, CFOs, COOs



Compliance, Risk & Privacy



Expect Security Spending to Increase Over the Next Year

## The Methodology

The Global State of Information Security® Survey was conducted on February 1, 2012 to April 15, 2012. It surveyed readers of CIO and CSO magazines and clients of PwC from 128 countries, 33% from companies with revenue over \$500 million and 25% with revenue over a billion dollars. While the majority (52%) were members or managers in the IT security industry, 21% were CEOs, CFOs or COOs, 14% were CIOs, CSOs, CTOs or CISOs and 13% worked in Compliance, Risk and Privacy. With over 9,300 responses to 40 questions, and a margin of error of less than 1%, the survey provided a good insight into the current state of the industry.

## The Confidence of the Industry

Out of those surveyed, 68% of respondents were either somewhat or very confident they had instilled effective security behaviors into their organizational culture, and 70% were confident that their organization’s information security activities were effective. When measured against the PwC’s criteria for actual information security leaders however, many of the respondents fell short.

True information security leaders were identified as having an overall information security strategy, employing a CISO or equivalent who reports to the “top of the house”, having measured and reviewed the effectiveness of security within the past year and understanding exactly what type of security events had occurred in that time. Out of those surveyed, only 8% could be considered to be true, information security leaders.

## The State of Things

A little less than half of the respondents expected security spending to increase over the next year (45%), employed a CISO or equivalent (42%), had measured and reviewed security over the past year (49%), had a mobile security strategy (44%) or used intrusion prevention tools (59%). Even less involved information security in major initiatives at project inception (25%), or aligned security spending with business goals (30%). The respondents were best at using malicious code detection tools (71%) and having a framework that integrated compliance, privacy/data use, and security and ID theft (60%).

Security budgets aren’t in as much danger as they were last year, but the trend toward bigger security budgets has leveled off with 18% of the respondents ▶

## The Take Away

As a result of the rapidly evolving state of information security, the security models of the past decade are no longer sufficient. More than ever before, security leaders must understand, prepare for, and quickly respond to security threats while constantly staying in touch with new business practices.

Companies that want to be true information security leaders must implement a comprehensive risk-assessment strategy, understand the value of the organization's information, understand that information security requirements have changed and that security is now both a means to protect data as well as an opportunity to create value for the business.

saying they didn't know where spending was headed. The good news is that security reductions are relatively low. Respondents reported fewer cutbacks for security initiatives than last year and more respondents than last year said they had not reduced costs of security programs. When asked about their current budgets, 46% of respondents said economic conditions had the most effect on security spending. Additional priorities included security for cloud computing and tablets, protecting employee and customer data, social networking, mobility, and use of personal devices.

Experts say that strategies and budgets should be aligned with the goals of the larger organization and fortunately most respondents (79%) believed their security efforts and security dollars were well-targeted. Most of those surveyed reported their greatest hindrance was having insufficient capital expenditures (27%), followed by a lack of actionable vision (26%). One of the real hindrances for companies was the lack of employee security training with only 49% of respondents having an employee security awareness training program in place.

## Security Around the World

So how did information security vary around the world? Asia was the region leader in level of information security technologies, policies, and spending, with 46% employing a Chief Information Security Officer, 49% having business continuity/disaster recovery plan and 47% having a mobile device security strategy. Despite Asia's lead on information security in general, North America lead in keeping projects on track and continued to make gains in practices like training, mobility, business continuity and disaster recovery.



While ranking low in the number of self-identified front-runners, Europe did lead in the percentage of Chief Privacy Officers on staff, and rated high at employing CISOs and CSOs. Unfortunately, Europeans did trail most other regions in security and privacy safeguards.



**SOURCE** - Global State of Information Security® Survey, PwC Security. PricewaterhouseCoopers, April 15, 2013  
[www.pwc.com/gx/en/consulting-services/information-security-survey/download.jhtml](http://www.pwc.com/gx/en/consulting-services/information-security-survey/download.jhtml)