



Perceptions About Network Security

Survey of IT & IT security practitioners in the U.S.

Sponsored by Juniper Networks

Independently conducted by Ponemon Institute LLC

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Ponemon Institute, June 2011

Part 1. Introduction

Ponemon Institute is pleased to present the results of a study conducted to determine what IT and IT security practitioners in the US, UK, France and Germany think about how well their organizations are responding to threats against network security. Sponsored by Juniper Networks, we believe this research is important because it can provide insights from those who are dealing daily with the prevention and detection of these attacks. Specifically, what do they think about the current threat landscape and what are the most effective strategies to keep networks secure?

In this report, we focus only on the responses of US IT and IT security practitioners. Some of the topics addressed include:

- Are threats to network security increasing in frequency and sophistication?
- Is their organization's IT infrastructure secure enough to prevent successful attacks?
- What is the nature of the attacks and are the attackers and attack vectors known?
- Do organizations see complexity as a barrier to effective enterprise-wide network security?

We surveyed 583 IT and IT security practitioners in the US with an average of 9.57 years of experience. More than half (51 percent) are employed by organizations with more than 5,000 employees.

Some of the most salient findings are as follows:

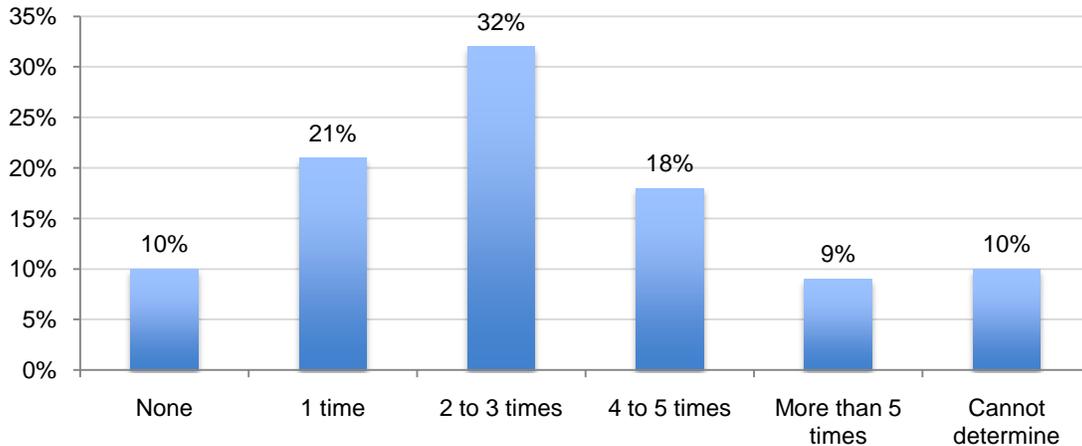
- Organizations are experiencing multiple breaches. More than half of respondents (59 percent) say they have had two or more breaches in the past 12 months and 10 percent do not know. Ninety percent of organizations in our study have had at least one breach.
- The financial consequences can be severe. When asked to consider cash outlays, internal labor, overhead, revenue losses and other expenses related to the security breach, 41 percent of respondents report that it was \$500,000 or more and 16 percent say they were not able to determine the amount.
- As a result of these multiple breaches, more than one-third (34 percent) of respondents say they have low confidence in the ability of their organization's IT infrastructure to prevent a network security breach.
- Insufficient budgets are an issue for many organizations in our study. Fifty-two percent of respondents say 10 percent or less of their IT budget is dedicated to security alone.
- In the next 12 to 18 months, 47 percent say their organizations will spend the most IT security dollars on network security.
- Complexity and lack of resources are the greatest challenges to improving network security. Almost half (48 percent) cite complexity as one of their biggest challenges to implementing network security solutions. The same percentage of respondents (48 percent) says it is resource constraints. Consequently, 76 percent are for streamlining or simplifying network security operations and 75 percent believe their effectiveness would increase by developing end-to-end solutions.

Part 2. Key Findings

Organizations are experiencing multiple successful attacks against their networks. Bar Chart 1 shows 59 percent (32+18+9) of respondents say their organization's network security has been successfully breached at least twice over the past 12 months. Ten percent do not know and 90 percent of organizations in our study have had at least one breach.

Bar Chart 1

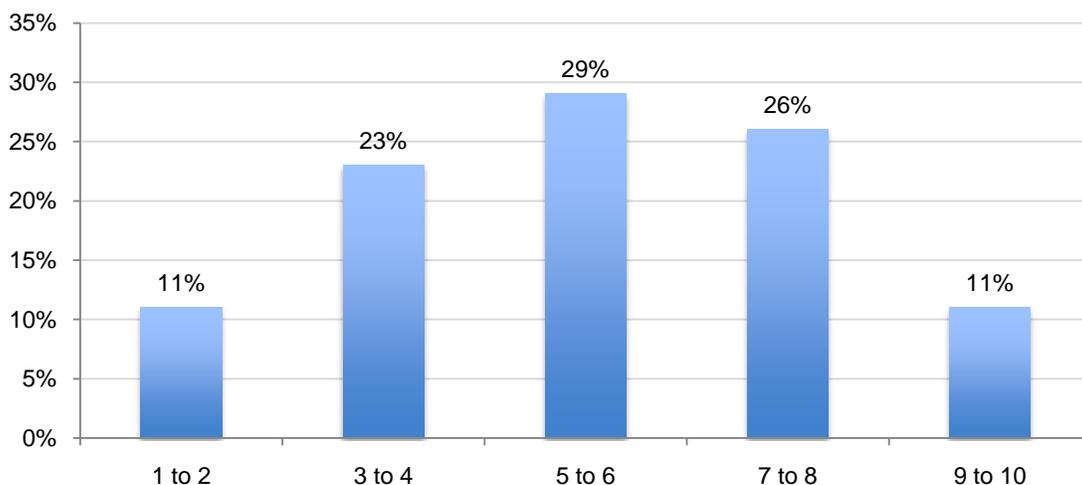
The number of successful network security breaches over the past 12 months



Bar Charts 2 and 3 on the following page show perceptions about the security of the IT infrastructure and the level of confidence in the ability to prevent network security breaches. We believe the fact that so many organizations are having multiple breaches is resulting in a low opinion about security preparedness and a low level of confidence they have to prevent a future attack. As shown in Bar Chart 2, 34 percent (11 + 23) of respondents say they have a low perception about their network security.

Bar Chart 2

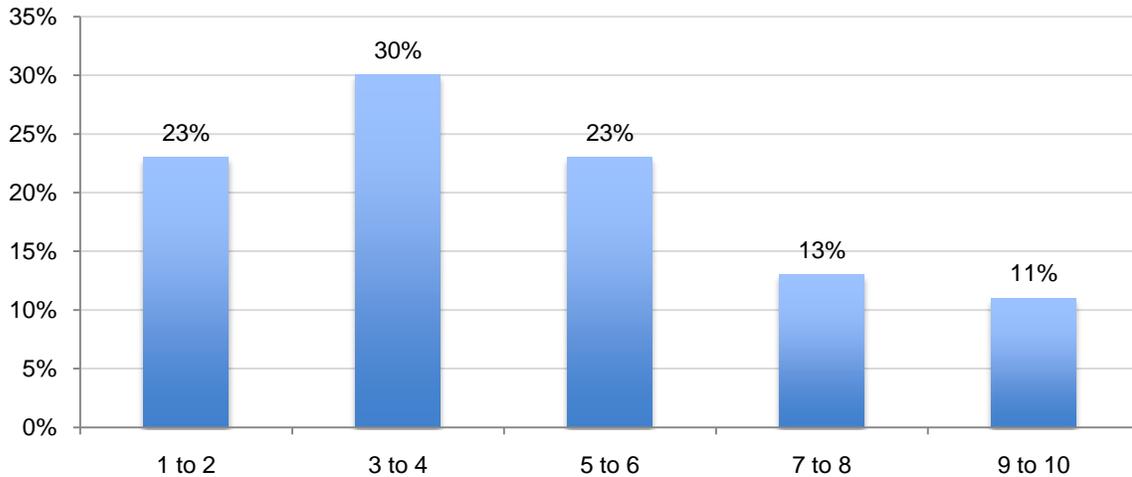
Perceptions about the security of the IT infrastructure to prevent network security breaches using a 10-point scale from 1 = insecure to 10 = completely secure.



Bar Chart 3 reveals that 53 (23 + 30) percent of respondents have little confidence that they can avoid one or more cyber attacks in the next 12 months.

Bar Chart 3

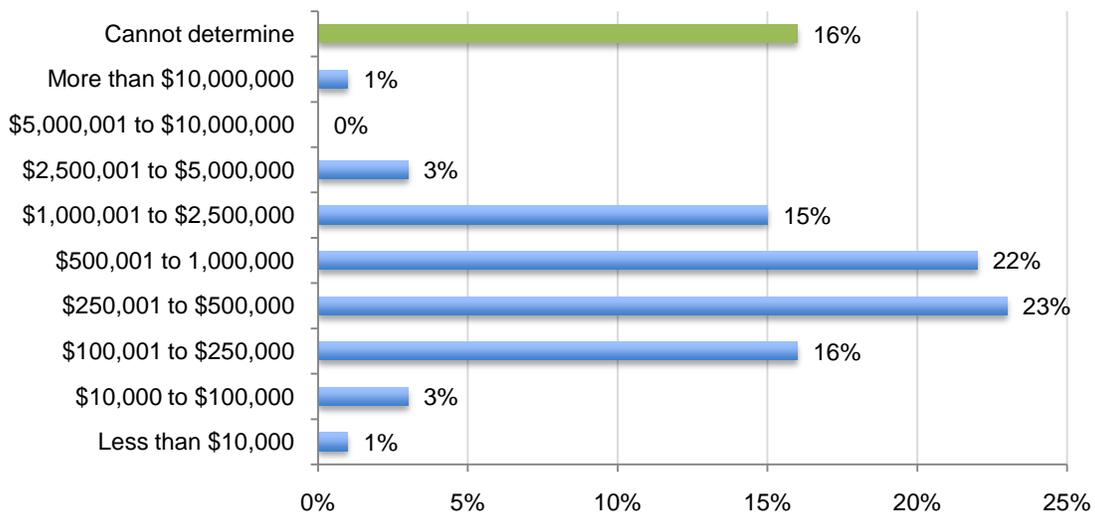
Respondents' perceptions about the level of confidence that their organization will not experience one or more cyber attacks sometime over the next 12 months using a 10-point scale from 1 = no confidence to 10 = absolute confidence.



The financial impact of a security breach can be severe. According to 41 percent of respondents, the financial impact of these breaches was \$500,000 or more, as shown in Bar Chart 4. However, 16 percent cannot determine the amount. Respondents were asked to consider cash outlays, internal labor, overhead, business disruption, revenue losses and other expenses.

Bar Chart 4

How much did cyber attacks cost your company over the past 12 months?



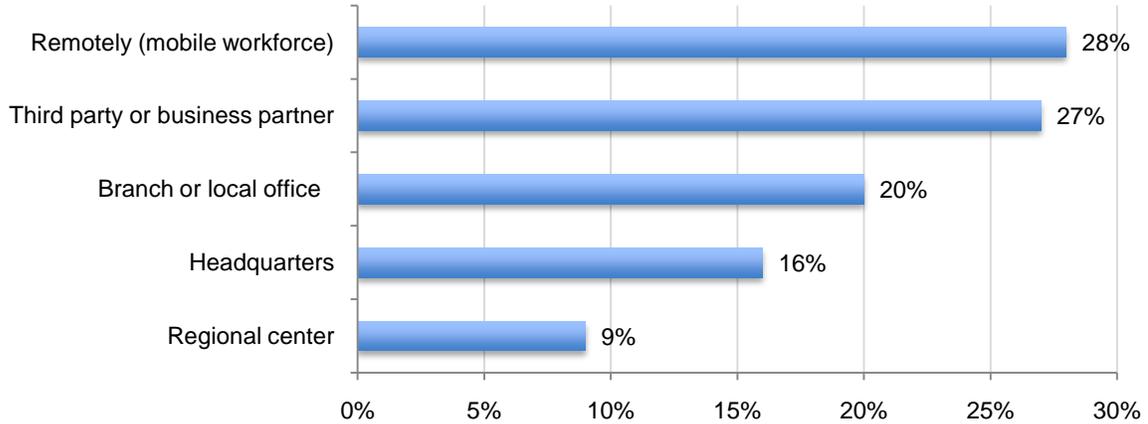
Respondents' estimate about the cost is consistent with two other studies Ponemon Institute conducts annually: the *Cost of a Data Breach* and the *Cost of Cyber Crime*. According to the findings, the average cost of one data breach for U.S. organizations participating in the 2010

study was \$7.2 million and the average cost of one cyber attack for U.S. organizations participating in the 2010 study was \$6.4 million.¹

Security breaches most often occur at off-site locations but the origin is not often known.

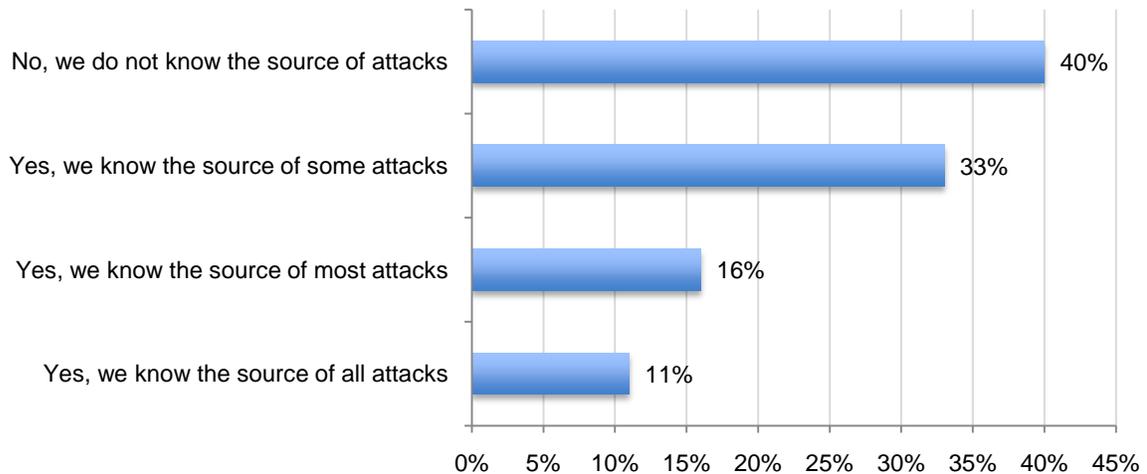
Mobile devices and outsourcing to third parties or business partners seem to be putting organizations at the most risk for a security breach. As shown in Bar Chart 5, 28 percent say the breaches occurred remotely and 27 percent say it was at a third party or business partner location.

Bar Chart 5
Where did these security breaches occur?



However, as shown in Bar Chart 6, there is uncertainty as to where the breaches originate. Forty percent of respondents do not know the source of the network security breaches. Of the 60 percent who say they know the source of all (11 percent) most (16 percent) or some of the attacks (33 percent), more than one-third (34 percent) of respondents say the source is China (not shown in the chart).

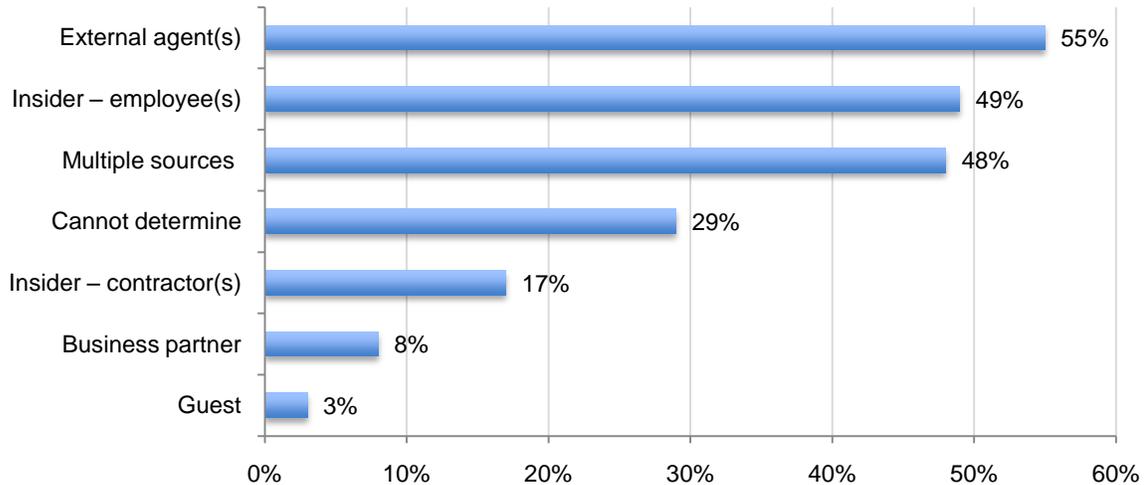
Bar Chart 6
What is the source of network security breaches experienced over the past 12 months?



¹ See *2010 Annual Cost of a Data Breach*, conducted by Ponemon Institute and sponsored by Symantec, March 2011. *Cost of a Cyber Crime*, conducted by Ponemon Institute and sponsored by ArcSight, an HP company, July 2010.

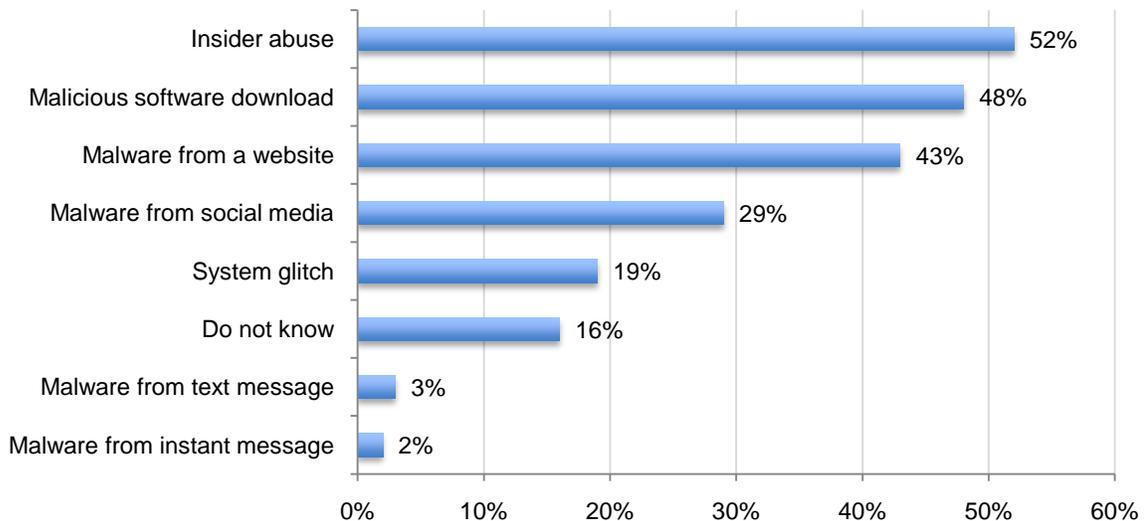
Attacks are coming from external agents but insider abuse is prevalent. Bar Chart 7 shows the person(s) most responsible for the attack. Both external agents and insiders (employees) are most often behind the security breaches according to 55 percent and 49 percent of respondents, respectively. Respondents also report that multiple sources can be blamed for the breaches.

Bar Chart 7
Who was behind security breaches experienced over the past 12 months?



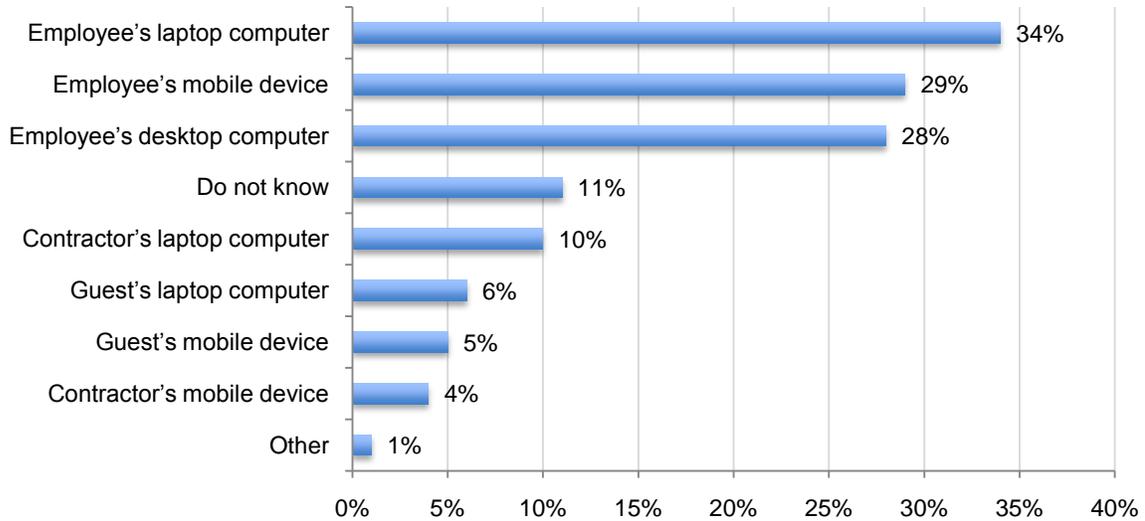
Fifty-two percent say the breaches were caused by insider abuse and 48 percent say it was malicious software download and 43 percent say it was malware from a website. Sixteen percent do not know the cause.

Bar Chart 8
How were these security breaches caused?



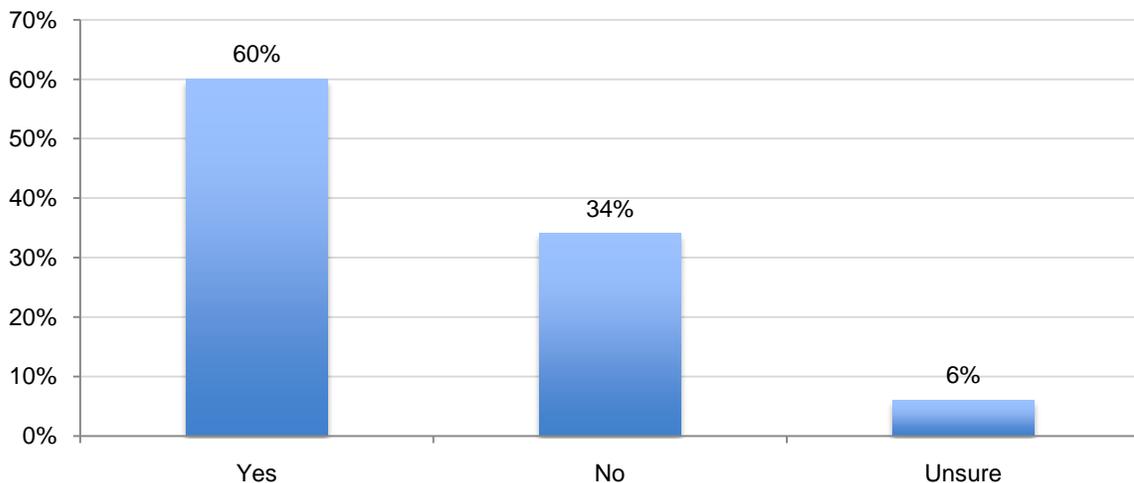
Employee mobile devices and laptops are seen as the most likely endpoint from which serious cyber attacks are unleashed against a company. Bar Chart 9 shows that 34 percent of respondents say attacks occurred from infected laptops or remotely due to an employee’s insecure mobile device. Further, the top two endpoints from which these breaches occurred are employees’ laptop computers (34 percent) and employees’ mobile devices (29 percent). Twenty-eight percent say it is employees’ desktop computers. Twenty-eight percent say it is employees’ desktop computers.

Bar Chart 9
What are the most likely endpoints from which serious cyber attacks are unleashed? (Top two choices)



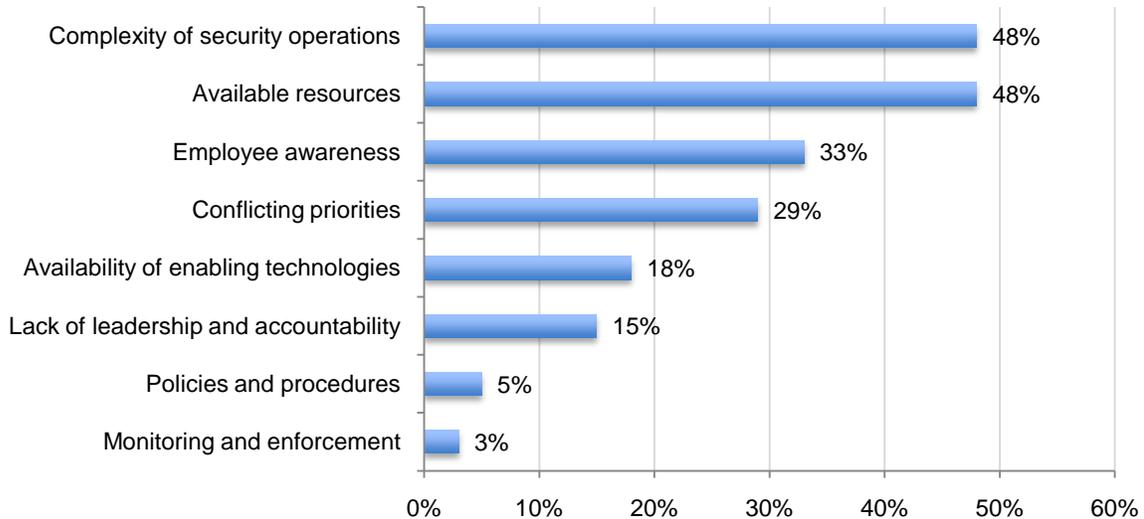
Despite knowing that mobile devices are putting organizations at risk, Bar Chart 10 reveals that 60 percent of respondents say their organizations permit mobile devices such as smartphones and tablets (including those personally owned by the employee) to access their company’s network or enterprise systems.

Bar Chart 10
Do you allow mobile devices such as smartphones and tablets (including those personally owned by the employee) to access your company’s network or enterprise systems?



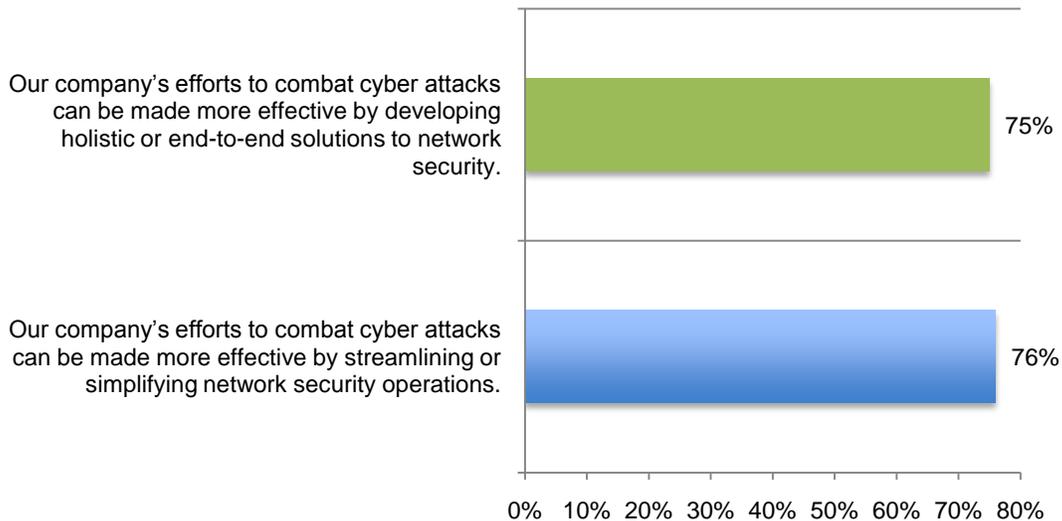
Complexity and availability of resources are the most serious challenges to combating cyber attacks. As shown in Bar Chart 11, almost half (48 percent) cite complexity as one of their biggest challenges to implementing network security solutions. The same percentage of respondents (48 percent) says it is resource constraints. These challenges are followed by lack of employee awareness, which contributes to the insider risk. In addition to simplifying their security operations and increasing available resources, organizations should consider the importance of training and awareness.

Bar Chart 11
 Serious challenges to ensuring network security operations are effective. (Top three choices)



Because almost half believe complexity is a major obstacle to fighting cyber crime, 76 percent of respondents favor streamlining or simplifying network security operations and 75 percent of respondents believe their effectiveness would increase by developing end-to-end solutions. See the following bar chart.

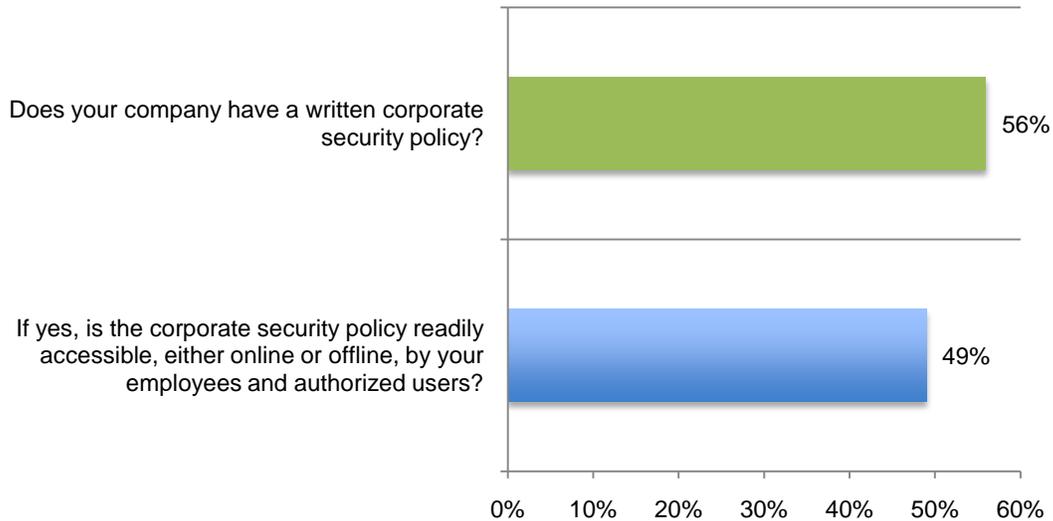
Bar Chart 12
 The following statements were rated using a five-point scale from strongly agree to strongly disagree.



To address the challenge of awareness and training, all organizations should have written corporate security policies that define the responsibilities of employees to help keep the network secure. As shown in Bar Chart 13, slightly more than half (56 percent) of organizations in our study say they have a written corporate security policy. Less than half (49 percent) say the corporate security policy is readily accessible by employees and other authorized users.

Bar Chart 13

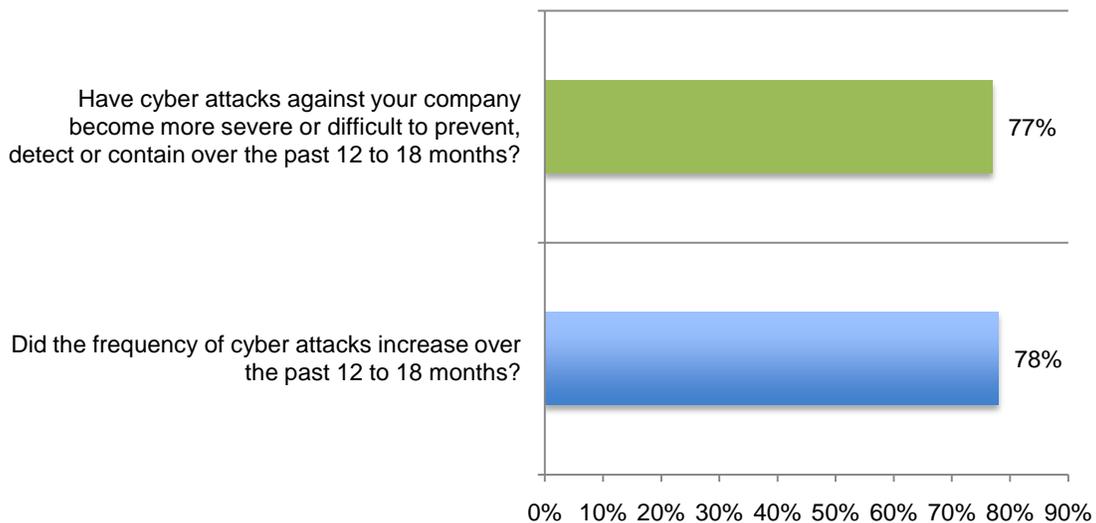
Does your organization have a security policy that is readily accessible?



Attacks are becoming more frequent and severe. Bar Chart 14 reveals that the IT practitioners in our study are worried about continuing and more serious attacks. Seventy-eight percent of respondents say there has been a significant (43 percent) or some (33 percent) increase in the frequency of cyber attacks during the 12 months, and 77 percent say these attacks have become more severe or difficult to detect, or contain.

Bar Chart 14

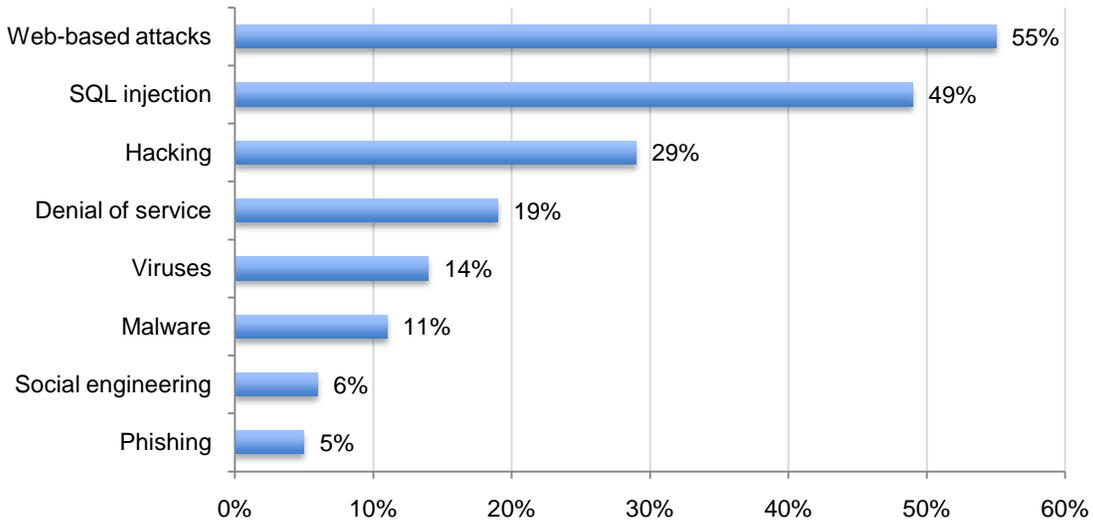
Are attacks against your organization becoming more frequent and severe?



According to respondents and shown in Bar Chart 15, by far the most serious types of cyber attacks are web-based attacks and SQL injections. The least serious attacks are phishing, social engineering and malware.

Bar Chart 15

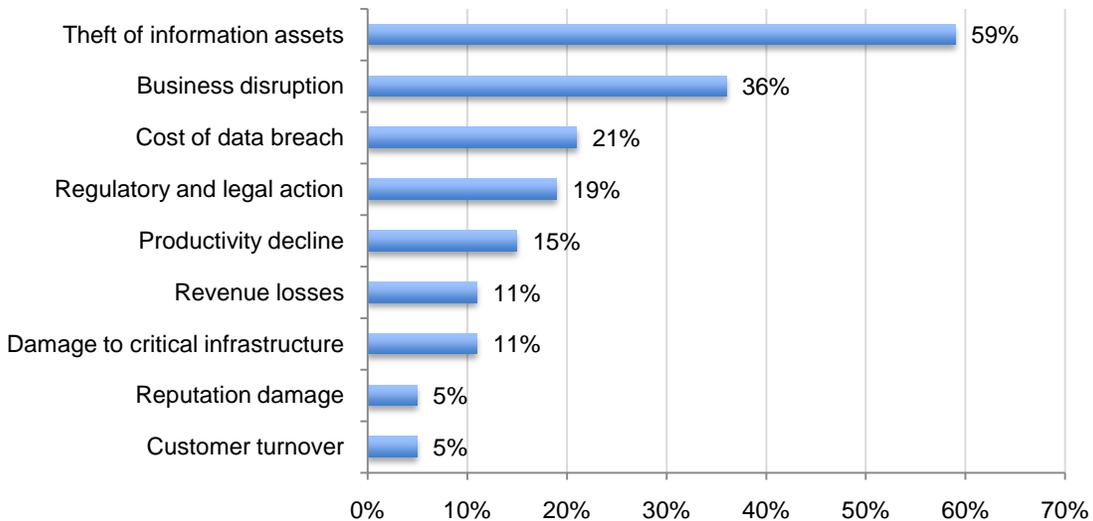
The most serious types of cyber attacks experienced by your company? (Top two choices)



Respondents also believe theft of information assets and business disruption are considered the most serious consequences of these attacks (see Bar Chart 16). The least serious consequences concern customer turnover, reputation effects and damage to critical infrastructure.

Bar Chart 16

The most severe consequence of cyber attacks? (Top two choices)

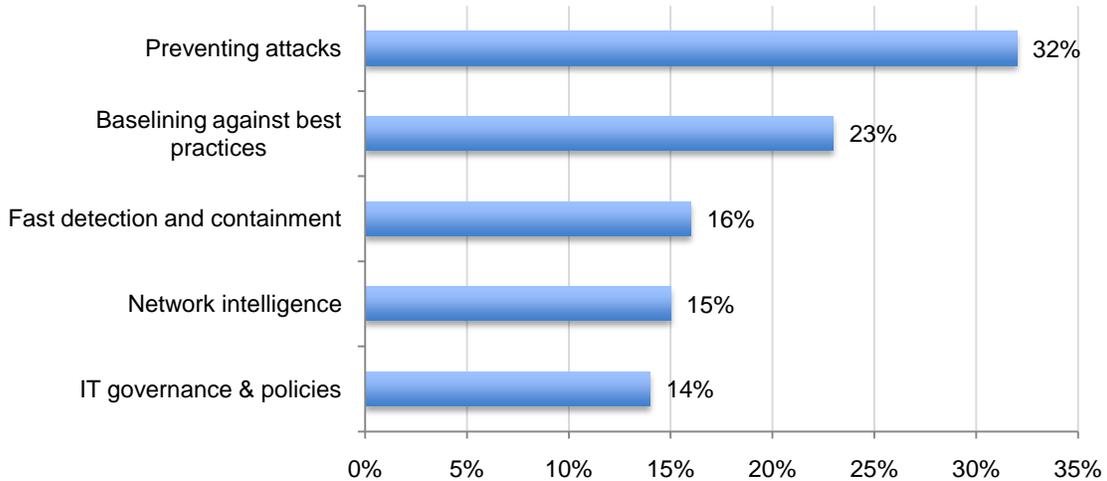


Given the current threat landscape, organizations should make prevention and detection of security breaches a primary focus. Bar Chart 17 shows that while it is the largest percentage, only 32 percent of respondents say their primary focus or approach to network security is on preventing attacks. Sixteen percent say it is on fast detection and containment and

15 percent say it is on network intelligence. Twenty-three percent say their network security strategy is to baseline their approach against best practices and 14 percent say it is IT governance.

Bar Chart 17

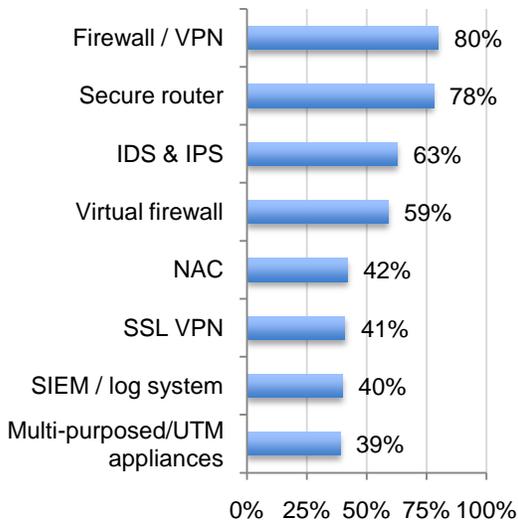
What one statement best describes your company's primary focus or approach to network security?



Bar Charts 18a and 18b show the types of security currently in use by organizations. The top three securities running on networks are: firewall/VPN, secure router and intrusion detection and prevention appliances. The top three securities running on their approved corporate endpoints today are: anti-virus, anti-malware and anti-spam.

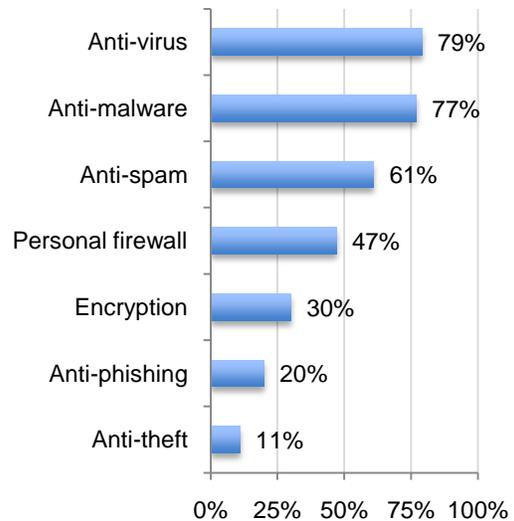
Bar Chart 18a

What type of security is running on your network today?



Bar Chart 18b

What type of security is running on your approved corporate endpoints today?



Part 3. Methods

Table 1 summarizes the sample response for this study conducted over a five-day period ending in June 2011. Our sampling frame of practitioners consisted of 21,337 individuals located in the United States who have bona fide credentials in the IT or IT security fields. From this sampling frame, we invited 20,519 individuals. This resulted in 688 individuals completing the survey of which 105 were rejected for reliability issues. Our final sample before screening was 583, thus resulting in a 2.7% response rate.

Table 1: Sample response	US
Total sample frame	21,337
Returns	688
Reliability rejections	105
Final sample	583
Response rate	2.7%

On average, respondents held 9.57 years of experience in either the IT or IT security fields. Twenty-one percent of respondents are female and 79 percent male. Table 2 shows the position levels of respondents. As shown, 62 percent of respondents are at or above the supervisory level.

Table 2: Organizational level that best describes respondents' position	Pct%
Senior Executive	2%
Vice President	1%
Director	17%
Manager	23%
Supervisor	19%
Technician	34%
Staff	2%
Contractor	2%
Total	100%

Table 3 shows the headcount (size) of respondents' business companies or government entities. As can be seen, 51 percent of respondents are employed by larger-sized organizations with more than 5,000 individuals.

Table 3. Worldwide headcount of respondents' organizations	Pct%
Less than 500 people	9%
500 to 1,000 people	13%
1,001 to 5,000 people	27%
5,001 to 25,000 people	26%
25,001 to 75,000 people	13%
More than 75,000 people	12%
Total	100%

Pie Chart 1 shows the industry distribution for respondents who are employed by private and public sector organizations. As can be seen, the largest sectors include financial services (including banking, insurance, credit cards, investment management), public sector (including federal, state and local government organizations), and healthcare & pharmaceuticals.

Pie Chart 1: Industry segments of respondents' organizations

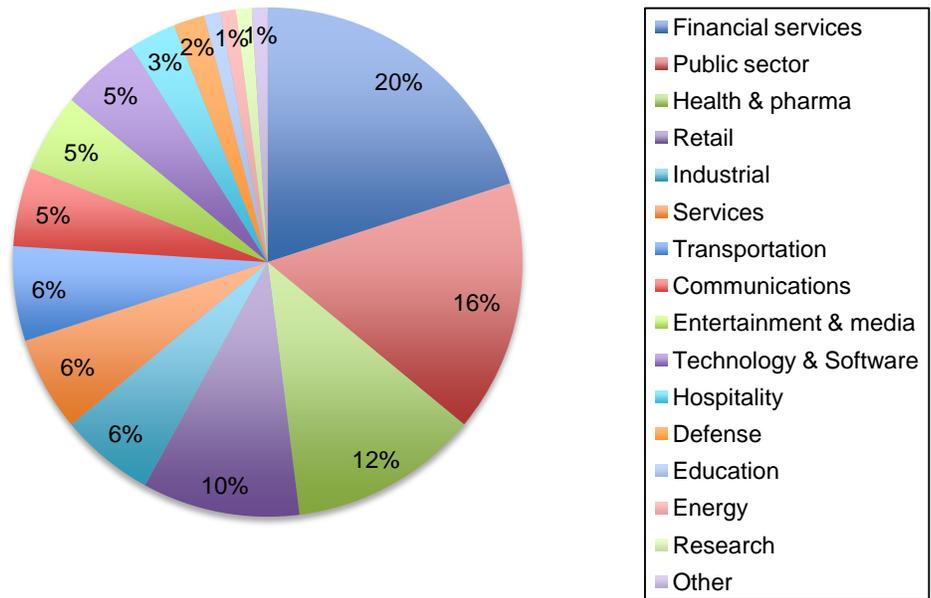


Table 4 reports the geographic footprint of respondents' organizations. In total, 76 percent of organizations have operations (headcount) in two or more countries. In addition, 65 percent have operations in one or more European nations. Finally, a total of 43 percent have operations in all major regions of the world.

Table 4 reports the geographic footprint of respondents' organizations. In total, 64 percent of organizations have operations (headcount) in two or more countries. In addition, 61 percent have operations in one or more European nations. Finally, a total of 44 percent have operations in all major regions of the world.

Table 4: Geographic footprint of respondents' organizations	Pct%
United States	100%
Canada	64%
Europe	61%
Middle East & Africa	20%
Asia-Pacific	58%
Latin America (including Mexico)	52%

Part 4. Conclusion

We believe our research provides evidence that many organizations are lacking the right strategy to prevent cyber attacks against networks and enterprise systems. This study suggests conventional network security methods need to improve in order to curtail internal and external threats.

We believe organizations should consider incorporating the following recommendations in their network security strategy:

- Understand the risk employees' mobile devices create in the workplace. In addition to problems created when inappropriately being connected to the network, breaches involving lost or stolen laptop computers or other mobile data-bearing devices remain a consistent and expensive threat. According to Ponemon Institute's *2010 Annual Cost of a Data Breach Study*, 35 percent of organizations report that a lost or stolen mobile device caused the data breach they experienced.
- Create a comprehensive policy (including detailed guidelines) for all employees and contractors who use mobile devices in the workplace. The policy should address the risks associated with each device and the security procedures that should be followed. Guidelines can range from such topics as to what types of data should not be stored on these devices, how to determine if an application can be safely downloaded and how to report a lost or stolen device.
- Improve ability through expertise and enabling technologies to detect and prevent breaches. Understanding the source of the breaches can help organizations strengthen their cyber security strategy.
- Address the insider threat through the creation of an enterprise-wide security policy that includes the responsibilities of employees to help protect network security. The policy should be easily accessible. In addition, there should be a training and awareness program to ensure employees understand the various risks to the network and how they can contribute to preventing security breaches.
- Complexity is recognized as a barrier to effective network security strategy. Organizations should assess their current procedures and technologies to understand how best to streamline their approach and have an end-to-end (holistic) approach to network security.

Our studies consistently show that the cost of cyber attacks is increasing. Reducing an organization's vulnerability to such attacks through the combination of proper staffing, enabling technologies and training programs can help prevent the pattern of multiple breaches experienced by so many in our study.

Part 5. Caveats

There are inherent limitations to survey research that need to be carefully considered before drawing inferences from findings. The following items are specific limitations that are germane to most Web-based surveys.

- Non-response bias: The current findings are based on a sample of survey returns. We sent surveys to a representative sample of IT and IT security practitioners, resulting in a large number of usable returned responses. Despite non-response tests, it is always possible that individuals who did not participate are substantially different in terms of underlying beliefs from those who completed the survey.
- Sampling-frame bias: The accuracy is based on contact information and the degree to which the list is representative of individuals who are IT or IT security practitioners who deal with network security issues. We also acknowledge that responses from paper, interviews or telephone might result in a different pattern of findings.
- Self-reported results: The quality of survey research is based on the integrity of confidential responses received from respondents. While certain checks and balances were incorporated into our survey evaluation process, there is always the possibility that certain respondents did not provide responses that reflect their true opinions.

Appendix: Detailed Survey Findings

The following tables provide the percentage frequencies of responses to our survey instrument completed over a five-day period in June 2011. Respondents were located in the United States.

Part 1. Perceptions about network security

Q1. How secure is your IT infrastructure in terms of preventing network security breaches (cyber attacks)? Please use the following 10-point scale from 1 = insecure to 10 = completely secure.	Pct%
1 to 2	11%
3 to 4	23%
5 to 6	29%
7 to 8	26%
9 to 10	11%
Total	100%

Q2. How many times has your company's network security been successfully breached over the past 12 months?	Pct%
None (SKIP to Q7)	10%
1 time	21%
2 to 3 times	32%
4 to 5 times	18%
More than 5 times	9%
Cannot determine	10%
Total	100%

Q3. Approximately how much did cyber attacks cost your company over the past 12 months? Please consider cash outlays, internal labor, overhead, business disruption, revenue losses and other expenses in your cost range selection. Expressed in US dollars.	Pct%
Less than \$10,000	1%
\$10,000 to \$100,000	3%
\$100,001 to \$250,000	16%
\$250,001 to \$500,000	23%
\$500,001 to 1,000,000	22%
\$1,000,001 to \$2,500,000	15%
\$2,500,001 to \$5,000,000	3%
\$5,000,001 to \$10,000,000	0%
More than \$10,000,000	1%
Cannot determine	16%
Total	100%

Q4. Where did these security breaches occur?	Pct%
Headquarters	16%
Regional center	9%
Branch or local office	20%
Remotely (mobile workforce)	28%
Third party or business partner	27%
Other (please specify)	0%
Total	100%

Q5a. Do you know the source (origin) of the network security breaches experienced by your company over the past 12 months?	Pct%
Yes, we know the source of all attacks	11%
Yes, we know the source of most attacks	16%
Yes, we know the source of some attacks	33%
No, we do not know the source of attacks	40%
Total	100%

Q5b. If yes, please check all the countries where these attacks originate.	Pct%
Brazil	3%
China (PRC)	34%
Russian Federation	19%
Taiwan	2%
United States	6%
Other [pull down menu]	21%
Cannot determine	15%
Total	100%

Q6a. Do you know who was behind security breaches experienced over the past 12 months?	Pct%
External agent(s)	55%
Insider – employee(s)	49%
Insider – contractor(s)	17%
Business partner	8%
Guest	3%
Multiple sources	48%
Cannot determine	10%
Do not know (SKIP to Q7)	19%
Total	209%

Q6b. How were these security breaches caused? Please check all that apply.	Pct%
Malware from a website	43%
Malicious software download	48%
Malware from social media	29%
Malware from text message	3%
Malware from instant message	2%
Insider abuse	52%
System glitch	19%
Other (please specify)	1%
Do not know	16%
Total	213%

Q6c. What was the endpoint (a.k.a. transport vehicle) from which these security breaches occurred? Please check all that apply.	Pct%
Employee's desktop computer	28%
Employee's laptop computer	34%
Employee's mobile device (smartphone, tablets, others)	29%
Contractor's laptop computer	10%
Contractor's mobile device	4%
Guest's laptop computer	6%
Guest's mobile device	5%
Other (please specify)	1%
Do not know	11%
Total	128%

Q7. How confident are you that your company will not experience one or more cyber attacks sometime over the next 12 months? Please use the following 10-point scale from 1 = no confidence to 10 = absolute confidence.	Pct%
1 to 2	23%
3 to 4	30%
5 to 6	23%
7 to 8	13%
9 to 10	11%
Total	100%

Q8. Do you allow mobile devices such as smartphones and tablets (including those personally owned by the employee) to access your company's network or enterprise systems?	Pct%
Yes	60%
No	34%
Unsure	6%
Total	100%

Q9. What do you see as the most likely endpoints from which serious cyber attacks are unleashed against a company? Please select only two top choices.	Pct%
Employee's desktop computer	23%
Employee's laptop computer	58%
Employee's mobile device (smartphone, tablets, others)	55%
Contractor's laptop computer	28%
Contractor's mobile device	21%
Guest's laptop computer	6%
Guest's mobile device	5%
Other (please specify)	2%
Total	198%

Q10. What one statement best describes your company's primary focus or approach to network security?	Pct%
Preventing attacks	32%
Fast detection and containment	16%
Network intelligence	15%
Baselining against best practices	23%
IT governance including policies and enforcement	14%
Other (please specify)	0%
Total	100%

Q11. What type of security is running on your network right now? Please check all that apply.	Pct%
Firewall / VPN	80%
Secure router	78%
Virtual firewall	59%
Intrusion Detection and Prevention appliances	63%
Multi-purposed/UTM appliances	39%
SIEM / log system	40%
SSL VPN	41%
NAC	42%
Other (please specify)	2%
Total	444%

Q12. What type of security is running on your approved corporate endpoints today?	Pct%
Anti-virus	79%
Anti-spam	61%
Anti-malware	77%
Personal firewall	47%
Anti-phishing	20%
Anti-theft	11%
Encryption	30%
Other (please specify)	3%
Total	328%

Q13a. Does your company deploy a secure virtual private network (VPN) for remote access to your company's network?	Pct%
Yes	72%
No	24%
Unsure	4%
Total	100%

Q13b. If yes, what type of VPN does your company deploy?	Pct%
SSL VPN	50%
IPsec VPN	44%
Other (please specify)	4%
Unsure	2%
Total	100%

Q14. In your opinion, did the frequency of cyber attacks increase over the past 12 to 18 months?	Pct%
Yes, significant increase	43%
Yes, some increase	35%
No	18%
Unsure	4%
Total	100%

Q15. In your opinion, have cyber attacks against your company become more severe or difficult to prevent, detect or contain over the past 12 to 18 months?	Pct%
Yes	77%
No	18%
Unsure	5%
Total	100%

Q16. What do you see as the most serious types of cyber attacks experienced by your company? Please select only two choices.	Pct%
Viruses	14%
Malware	11%
Hacking	29%
Web-based attacks	55%
SQL injection	49%
Phishing	5%
Social engineering	6%
Denial of service	19%
Other (please specify)	2%
Total	190%

Q17. What do you see as the most severe consequence of cyber attacks? Please select only two choices.	Pct%
Business disruption	36%
Theft of information assets	59%
Damage to critical infrastructure	11%
Revenue losses	11%
Customer turnover	5%
Productivity decline	15%
Cost of data breach	21%
Regulatory and legal action	19%
Reputation damage	5%
Other (please specify)	0%
Total	182%

Q18. Do you feel security planning is given sufficient emphasis and funding within your organization?	Pct%
Yes	43%
No	55%
Unsure	2%
Total	100%

Please rate the following two statements using the scale provided below each item.	
Q19a. Our company's efforts to combat cyber attacks can be made more effective by streamlining or simplifying network security operations.	Pct%
Strongly agree	32%
Agree	44%
Unsure	9%
Disagree	8%
Strongly disagree	7%
Total	100%

Q19b. Our company's efforts to combat cyber attacks can be made more effective by developing holistic or end-to-end solutions to network security.	Pct%
Strongly agree	30%
Agree	45%
Unsure	10%
Disagree	9%
Strongly disagree	6%
Total	100%

Q20. What percentage of your IT budget is dedicated to security alone?	Pct%
Less than 5%	16%
5 to 10%	36%
11 to 25%	21%
26 to 50%	6%
51 to 75%	0%
More than 75%	1%
Cannot determine	20%
Total	100%

Q21. In which area of security do you plan to spend the most IT dollars in the next 12 to 18 months?	Pct%
Network security	47%
Device or endpoint security	26%
Mobile security	18%
Cloud security	9%
Other (please specify)	0%
Total	100%

Q22. Who in your organization is most responsible for ensuring that network security operations are effective at combating cyber attacks?	Pct%
Chief information officer	54%
Chief information security officer	21%
Chief security officer	10%
Chief compliance officer	4%
Risk management leader	6%
Fraud prevention unit leader	2%
Data center management	3%
Chief executive officer	0%
Chief financial officer	0%
Other (please specify)	0%
Total	100%

Q23. What are the most serious challenges to ensuring that network security operations are effective at combating cyber attacks? Please select only the top three choices.	Pct%
Available resources	48%
Conflicting priorities	29%
Lack of leadership and accountability	15%
Complexity of security operations	48%
Availability of enabling technologies	18%
Employee awareness	33%
Policies and procedures	5%
Monitoring and enforcement	3%
Other (please specify)	0%
Total	199%

Q24a. Does your company have a written corporate security policy?	Pct%
Yes	56%
No	25%
Unsure	19%
Total	100%

Q24b. If yes, is the corporate security policy readily accessible, either online or offline, by your employees and authorized users?	Pct%
Yes	49%
No	45%
Unsure	6%
Total	100%

Part 2. Your role and organization

D1. What organizational level best describes your current position?	Pct%
Senior Executive	2%
Vice President	1%
Director	17%
Manager	23%
Supervisor	19%
Technician	34%
Staff	2%
Contractor	2%
Other	0%
Total	100%

D2. Is this a full time position?	Pct%
Yes	99%
No	1%
Total	100%

D3. Check the Primary Person you or your immediate supervisor reports to within the organization.	Pct%
CEO/Executive Committee	0%
Chief Financial Officer	2%
General Counsel	2%
Chief Information Officer	53%
Chief Technology Officer	5%
Chief Information Security Officer	19%
Compliance Officer	2%
Chief Privacy Officer	1%
Human Resources VP	2%
Chief Security Officer	4%
Chief Risk Officer	6%
Other (please specify)	4%
Total	100%

D4. Total years of relevant experience:	Pct%
Total years of IT or security experience (mean value)	9.57
Total years in current position (mean value)	4.19

D5. Gender	Pct%
Female	21%
Male	79%
Total	100%

D6. What industry best describes your organization's industry focus?	Pct%
Communications	5%
Defense	2%
Education	1%
Energy	1%
Entertainment & media	5%
Financial services	20%
Health & pharmaceutical	12%
Hospitality	3%
Industrial	6%
Public sector	16%
Research	1%
Retail	10%
Services	6%
Technology & Software	5%
Transportation	6%
Other	1%
Total	100%

D7. Where are your employees located? (Check all that apply):	Pct%
United States	100%
Canada	64%
Europe	61%
Middle East & Africa	20%
Asia-Pacific	58%
Latin America (including Mexico)	52%

D8. What is the worldwide headcount of your organization?	Pct%
Less than 500 people	9%
500 to 1,000 people	13%
1,001 to 5,000 people	27%
5,001 to 25,000 people	26%
25,001 to 75,000 people	13%
More than 75,000 people	12%
Total	100%

Ponemon Institute

Advancing Responsible Information Management

Ponemon Institute is dedicated to independent research and education that advances responsible information and privacy management practices within business and government. Our mission is to conduct high quality, empirical studies on critical issues affecting the management and security of sensitive information about people and organizations.

As a member of the **Council of American Survey Research Organizations (CASRO)**, we uphold strict data confidentiality, privacy and ethical research standards. We do not collect any personally identifiable information from individuals (or company identifiable information in our business research). Furthermore, we have strict quality standards to ensure that subjects are not asked extraneous, irrelevant or improper questions.