Research Report

Abstract:

The Endpoint Security Paradox

By Jon Oltsik, Senior Principal Analyst and Bill Lundell, Senior Research Analyst

With Jennifer Gahm, Senior Project Manager and Kyle Prigmore, Associate Analyst

January 2015

Introduction

Research Objectives

In order to accurately assess organizations' endpoint security technologies, policies, and processes, ESG surveyed 340 IT and information security professionals representing large midmarket (500 to 999 employees) and enterprise-class (1,000 employees or more) organizations in North America. All respondents were responsible for evaluating, purchasing, and managing endpoint security technology products and services.

The survey was designed to answer the following questions about:

- Endpoint security knowledge and opinions
    - Do IT organizations believe that endpoint security is becoming more difficult? If so, why?
    - What is driving endpoint security strategy?
    - What are the biggest endpoint security challenges for organizations?
- The organization(s) responsible for endpoint security
    - Do organizations have the right skills and staff levels to address endpoint security?
    - Which groups are responsible for endpoint security today? Are they merging with different groups, or becoming more independent? Do these groups communicate well?
- Endpoint security technologies
    - What types of security controls and technologies are used today? How are these changing?
    - How are organizations adopting specific types of security technologies such as endpoint forensics, endpoint analytics, and advanced anti-malware products?
    - What are the most compelling features of these products?
- AV/host-based security software sentiment
- "Next-generation" endpoint security software sentiment
- Endpoint security strategies
    - Are organizations looking at endpoint security with a long-term perspective? Or are they making tactical purchases to solve immediate problems?
    - Are customers trying to integrate their endpoint security with other things, such as their network security solutions or threat intelligence feeds?

Survey participants represented a wide range of industries including financial services, manufacturing, retail, business services, communications and media, and government. For more details, please see the *Research Methodology* and *Respondent Demographics* sections of this report.

Research Methodology

To gather data for this report, ESG conducted a comprehensive online survey of IT and information security professionals from private- and public-sector organizations in North America (United States and Canada) between September 10, 2014 and September 22, 2014. To qualify for this survey, respondents were required to be IT professionals directly involved in evaluating, purchasing, and managing endpoint security technology products and services. All respondents were provided an incentive to complete the survey in the form of cash awards and/or cash equivalents.

After filtering out unqualified respondents, removing duplicate responses, and screening the remaining completed responses (on a number of criteria) for data integrity, we were left with a final total sample of 340 IT and information security professionals.

Please see the *Respondent Demographics* section of this report for more information on these respondents.

Note: Totals in figures and tables throughout this report may not add up to 100% due to rounding.

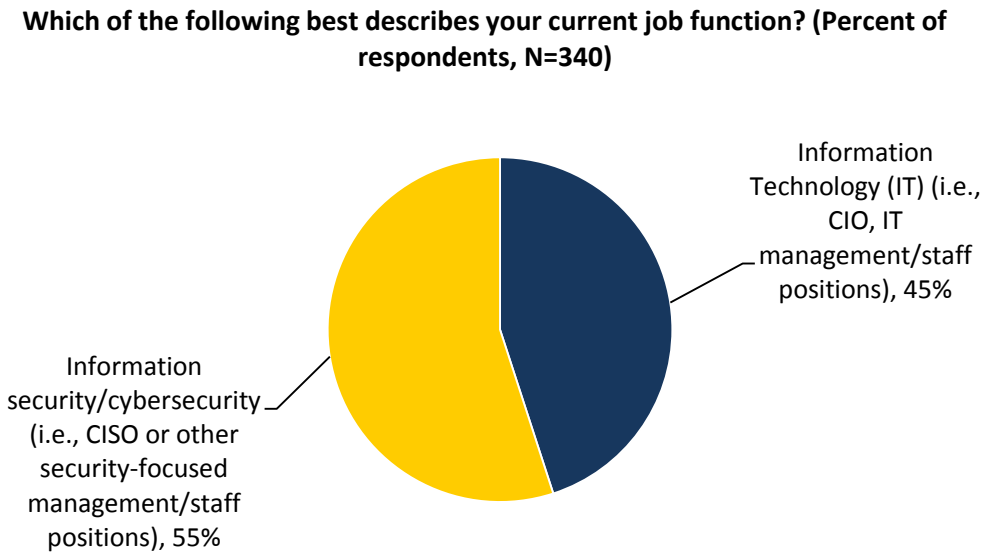
Respondent Demographics

The data presented in this report is based on a survey of 340 qualified respondents. Figures 41-44 detail the demographics of the respondent base, including individual respondents' current job function, as well as respondent organizations' total number of employees, primary industry, and annual revenue.

Respondents by Current Job Function

Respondents' current job function within their organizations is shown in Figure 1.

Figure 1. Survey Respondents by Current Job Function

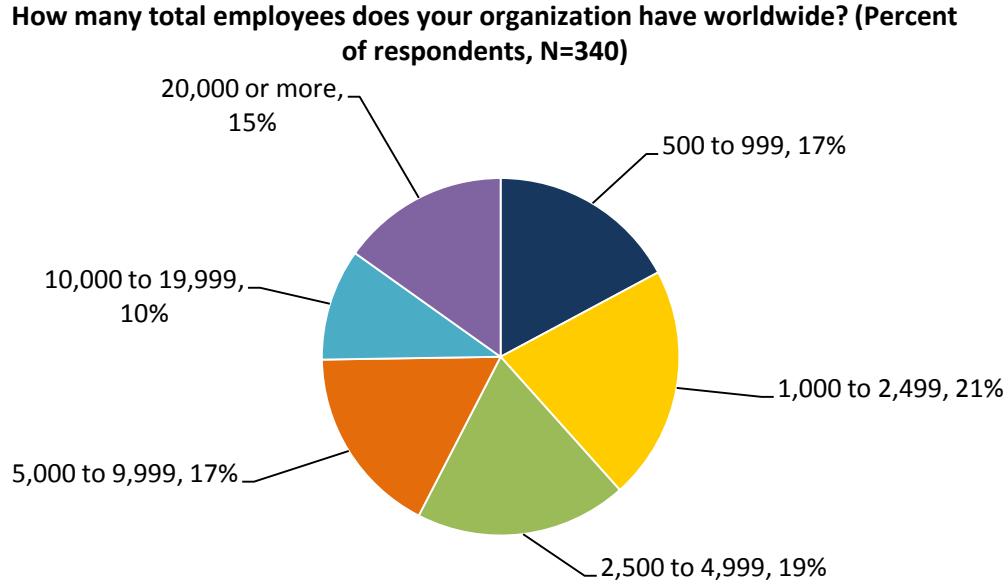


Source: Enterprise Strategy Group, 2015.

Respondents by Number of Employees

The number of employees in respondents' organizations is shown in Figure 2.

Figure 2. Survey Respondents by Number of Employees

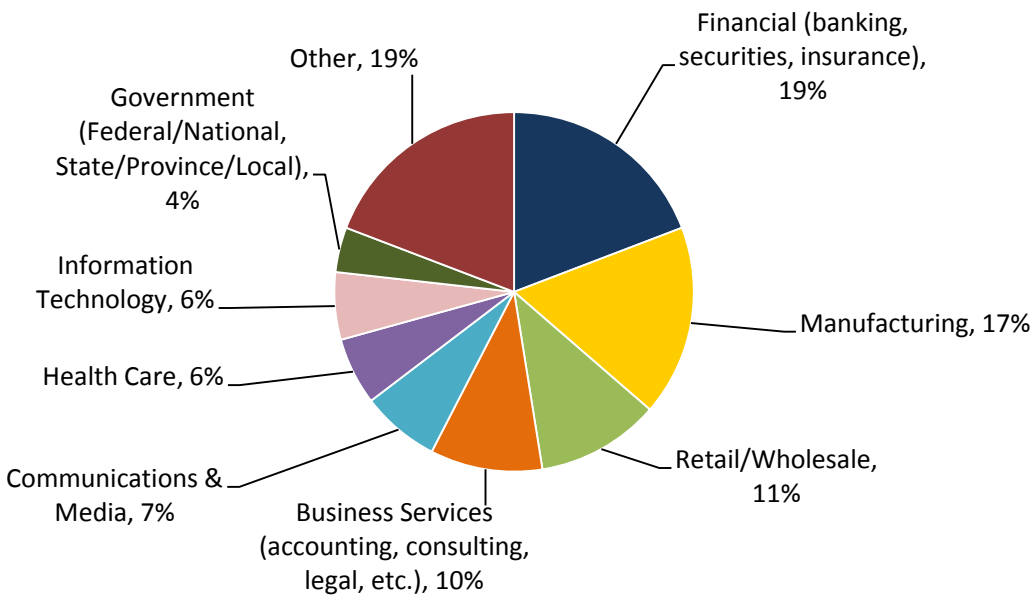


Source: Enterprise Strategy Group, 2015.

Respondents by Industry

Respondents were asked to identify their organizations' primary industry. In total, ESG received completed, qualified respondents from individuals in 20 distinct vertical industries, plus an "Other" category. Respondents were then grouped into the broader categories shown in Figure 3.

Figure 3. Survey Respondents by Industry

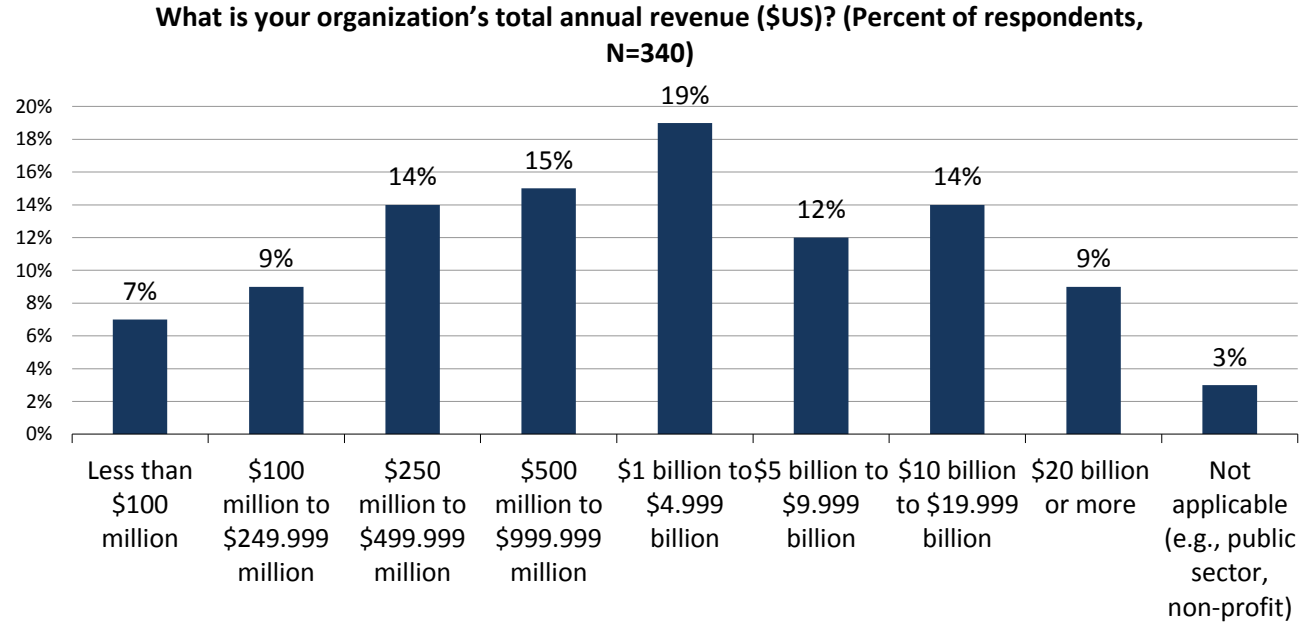


Source: Enterprise Strategy Group, 2015.

Respondents by Annual Revenue

Respondent organizations' annual revenue is shown in Figure 4.

Figure 4. Survey Respondents by Annual Revenue



Source: Enterprise Strategy Group, 2015.

Contents

List of Figures

List of Tables

Enterprise Strategy Group | **Getting to the bigger truth.**

20 Asylum Street | Milford, MA 01757 | Tel: 508.482.0188 Fax: 508.482.0128 | www.esg-global.com