

RSA[®]Conference2015

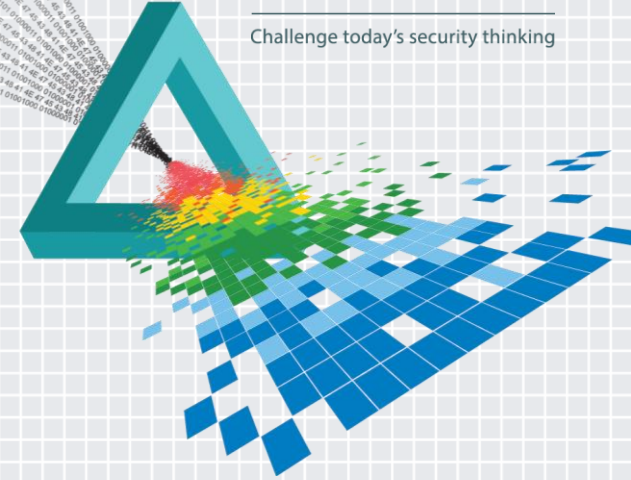
San Francisco | April 20-24 | Moscone Center

SESSION ID: PROF-M01

Status of the Industry: 2015 Global Information Security Workforce Study

CHANGE

Challenge today's security thinking



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The White House

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Executive Vice President
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@fdickson777

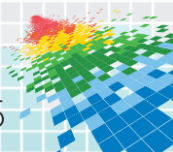
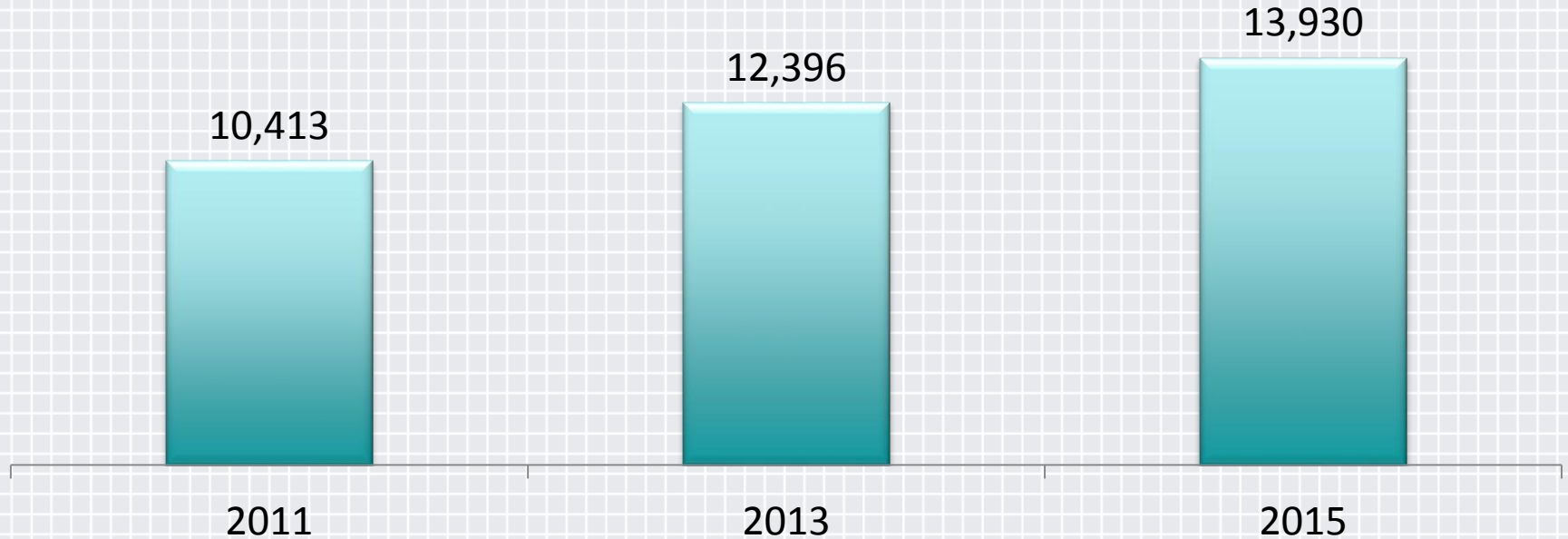
Elise Yacobellis

Director of Global Development
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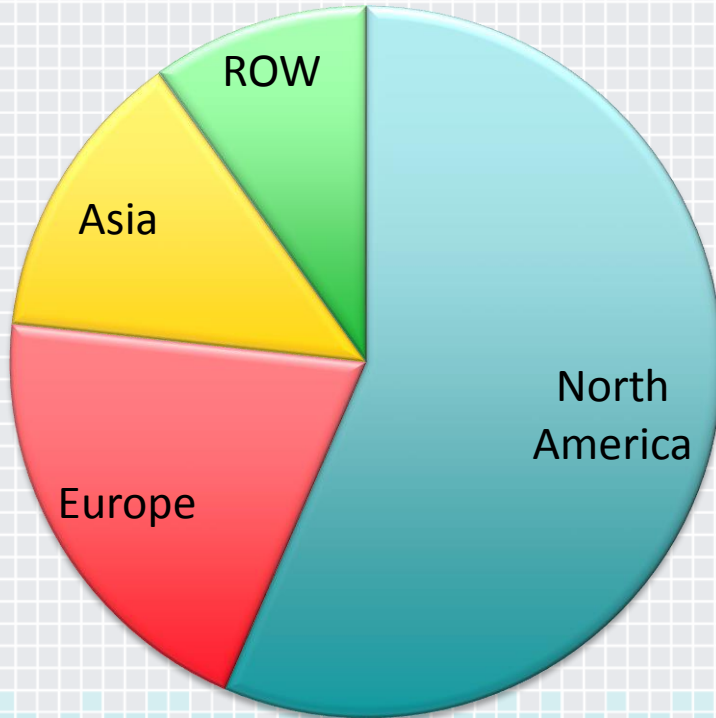
Large Longitudinal Effort

Global Information Security Workforce Study Respondents

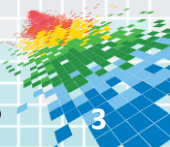
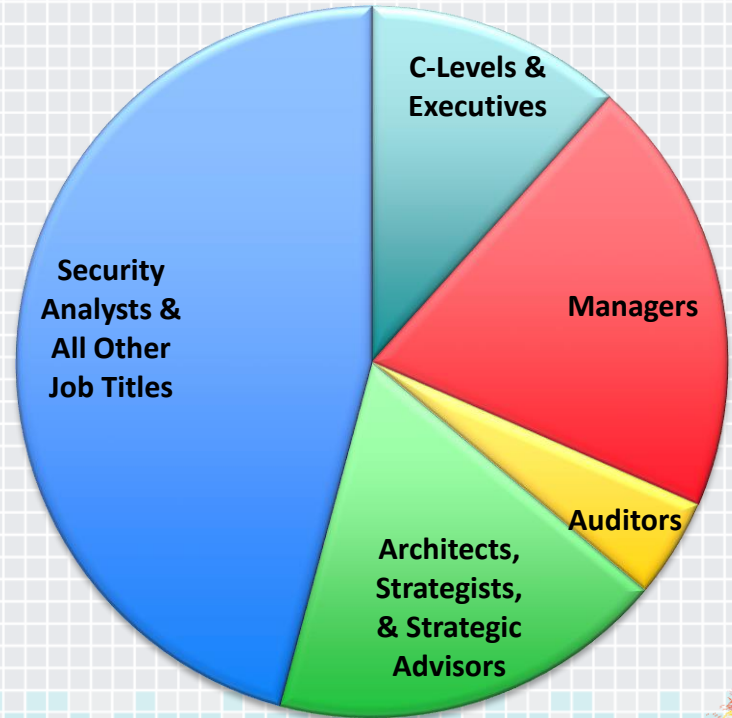


Diverse Respondent Representation

Respondents by Region

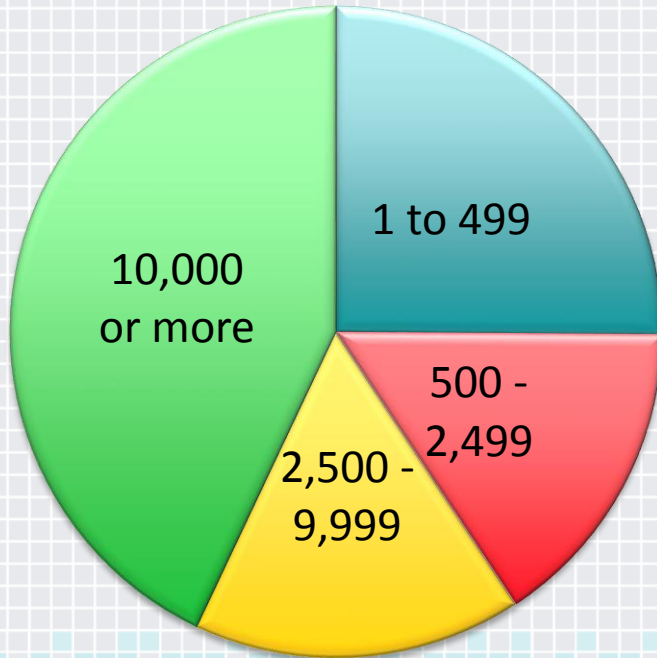


Respondents by Job Titles

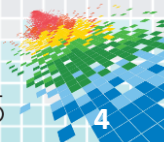
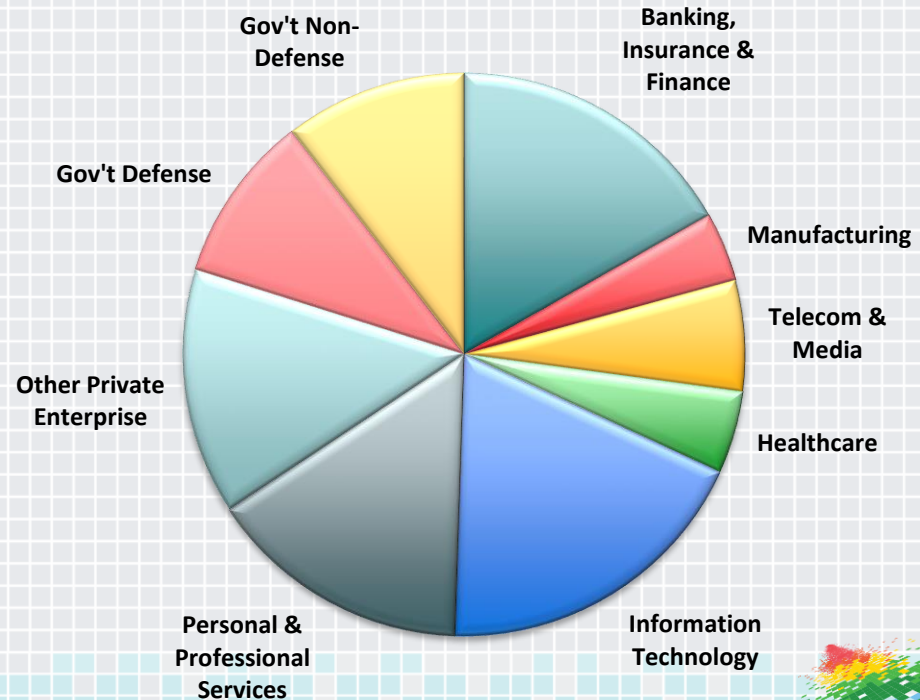


Diverse Company Representation #RSAC

Respondents by Company Size (Number of Employees)

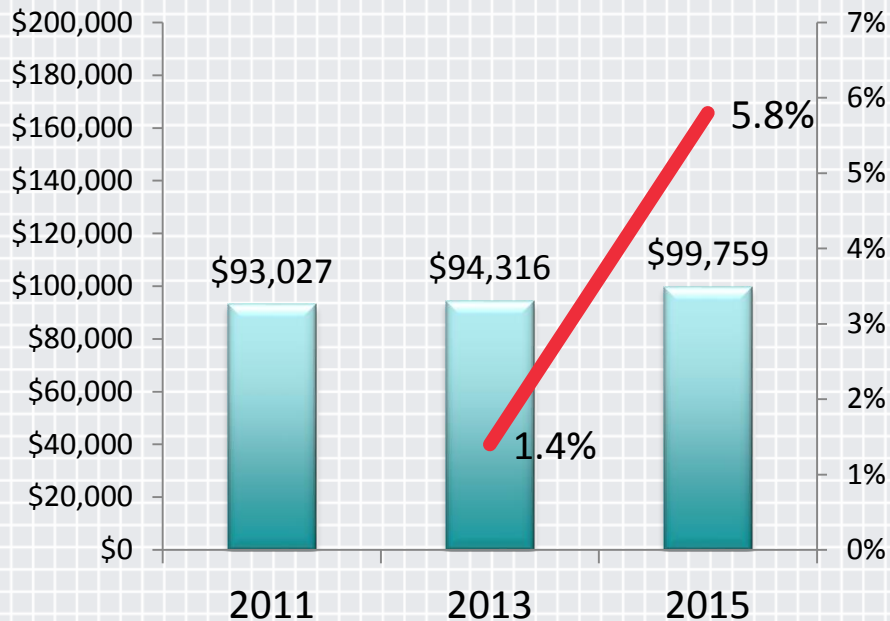


Respondents by Industry Vertical

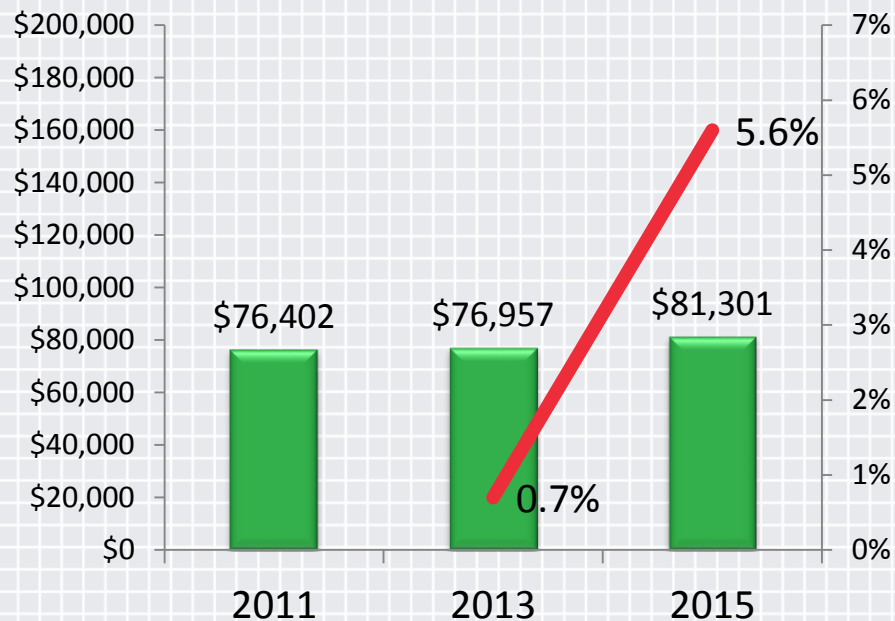


Let's talk about why you are here: Study Shows Salaries Increasing! #RSAC

US-Based Security Analysts in Private Sector (ISC)2 Members with CISSP Certification



US-Based Security Analysts in Private Sector Non-Members without CISSP Certification

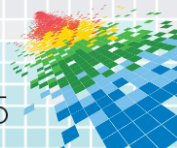


■ Average Annual Salary — Survey-over-Survey

■ Average Annual Salary — Survey-over-Survey

Key Themes of the 2015 Study

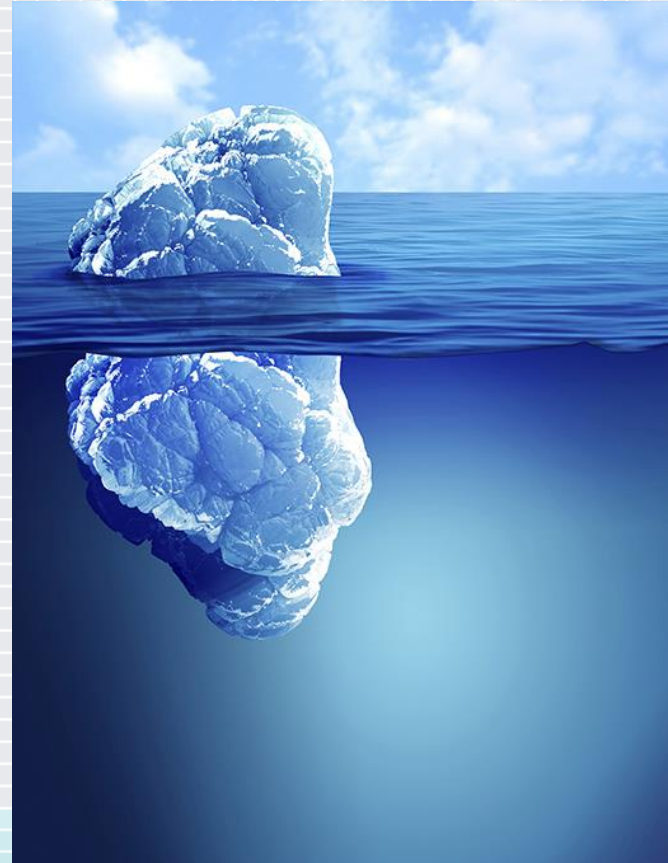
- ◆ Security Concerns Continue to Escalate
- ◆ Application Vulnerability Concerns Unmatched by Remediation Efforts
- ◆ Security Readiness Stuck in Neutral
 - ◆ Even though we are spending more money
- ◆ Sprawl in Security Technologies is a Material Concern
- ◆ Growing importance of managed or outsourced security services
- ◆ Cloud adoption is no longer a question of if, but how much.



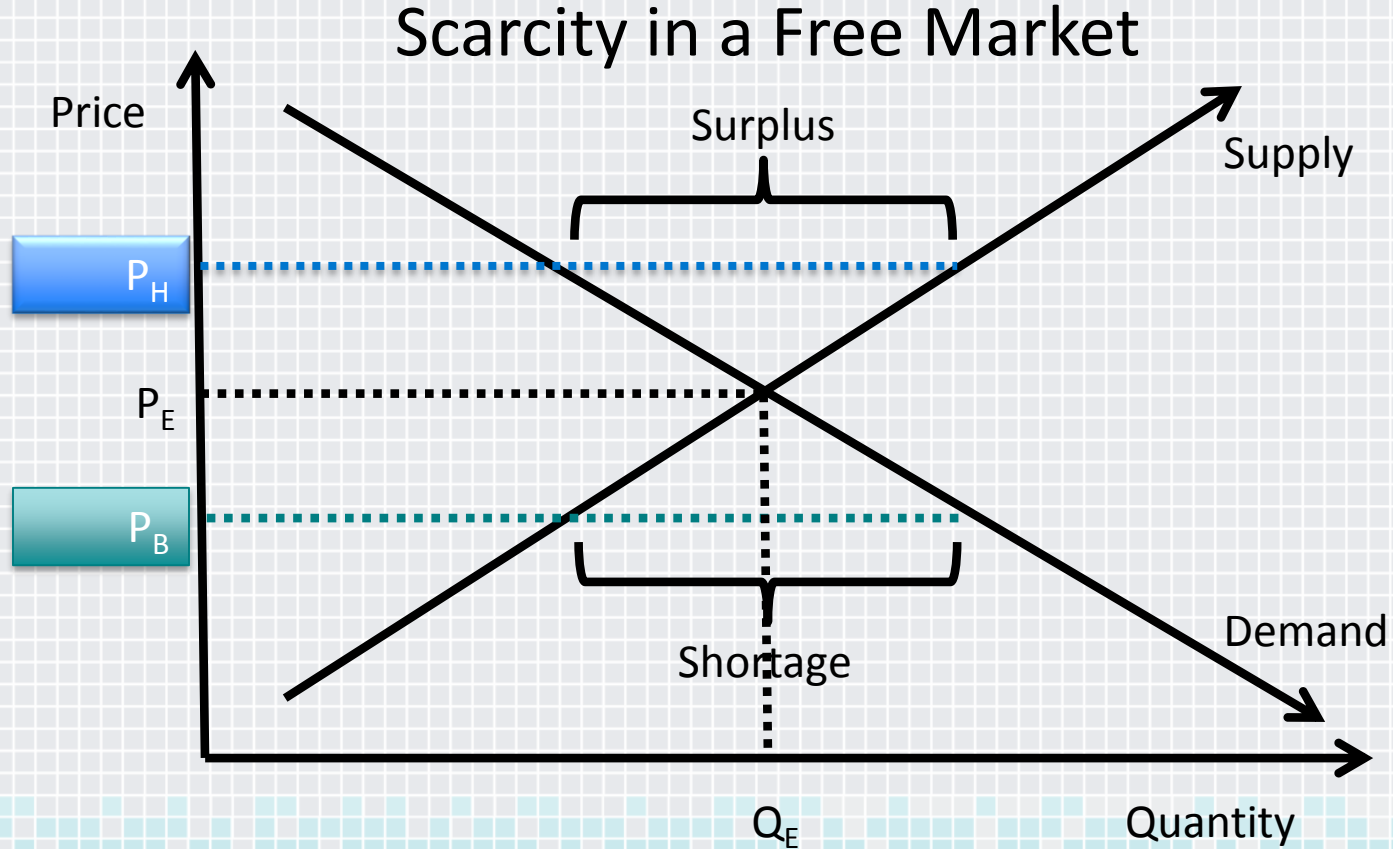
The Workforce Shortage

- ◆ What we can see . . .

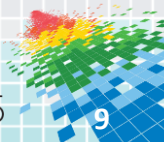
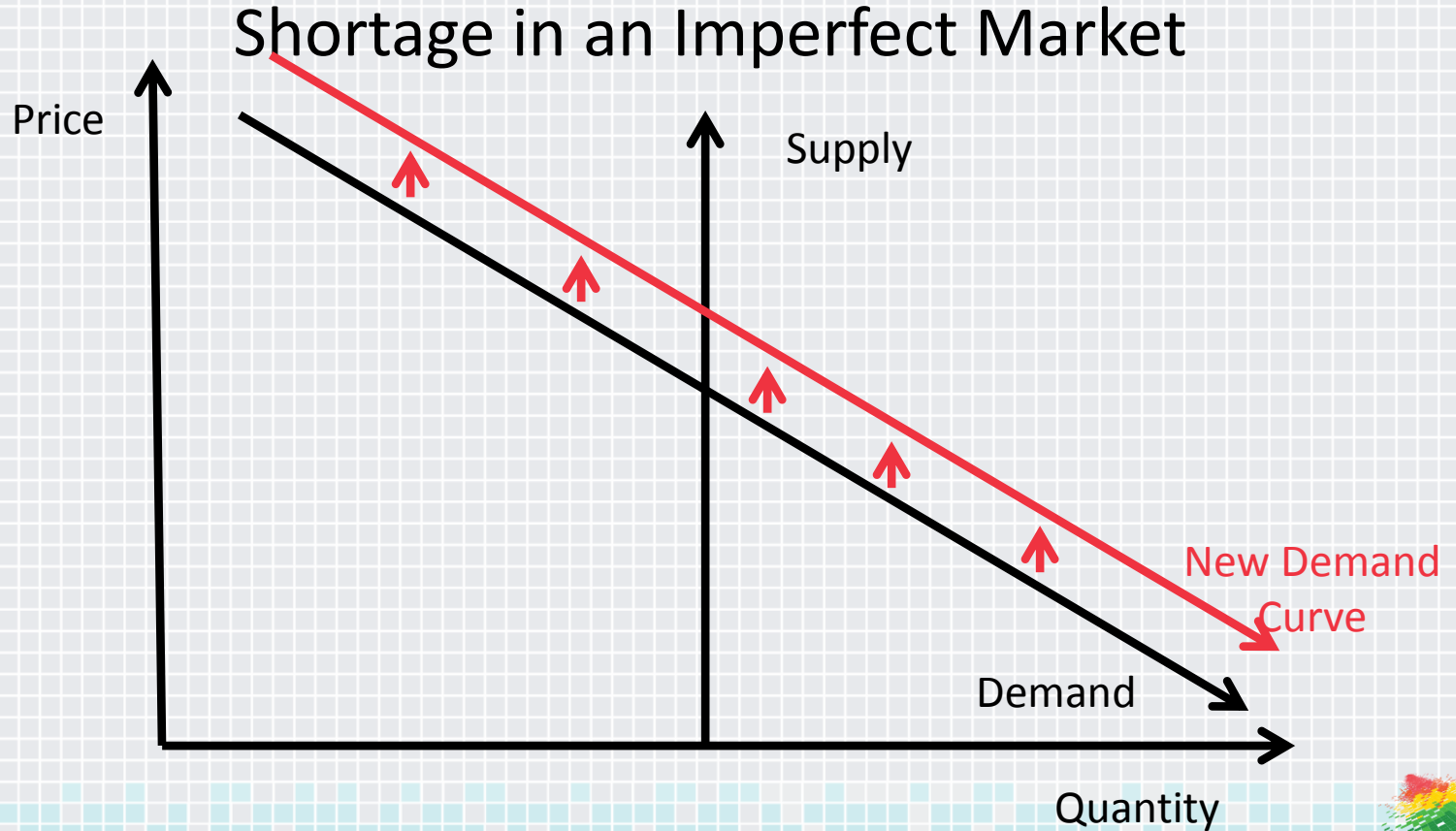
- ◆ And, what lies beneath



What is a Shortage?



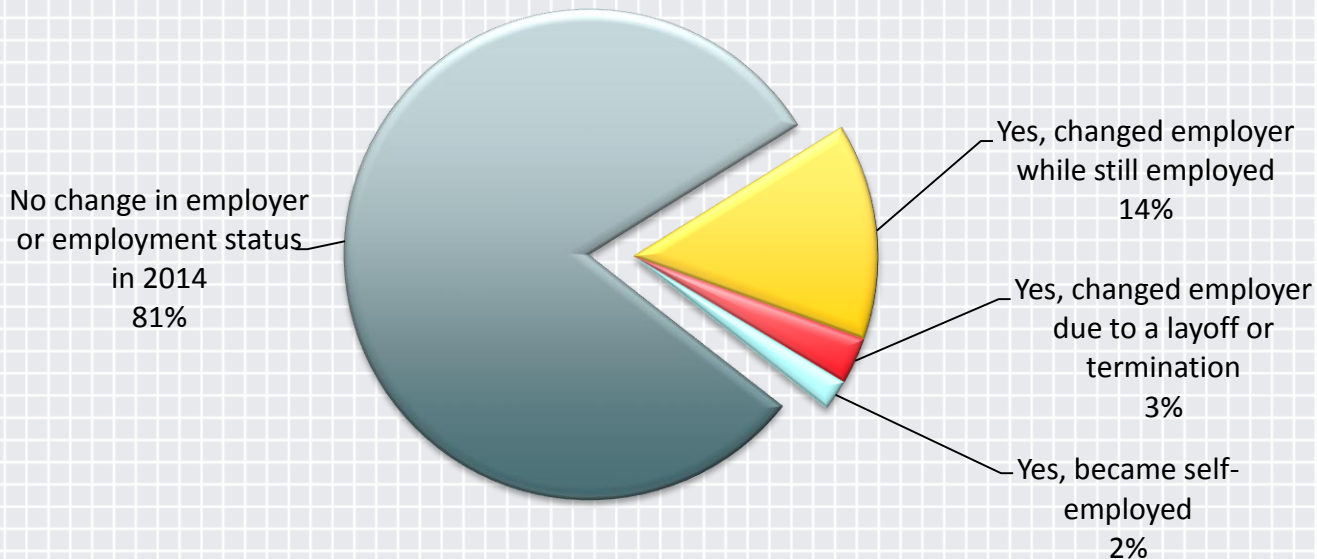
What is Shortage?



Workforce Shortage Indicators

Churn

**Did you change your employer or employment status in 2014?
(Percent of Survey Respondents)**

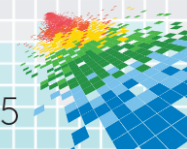
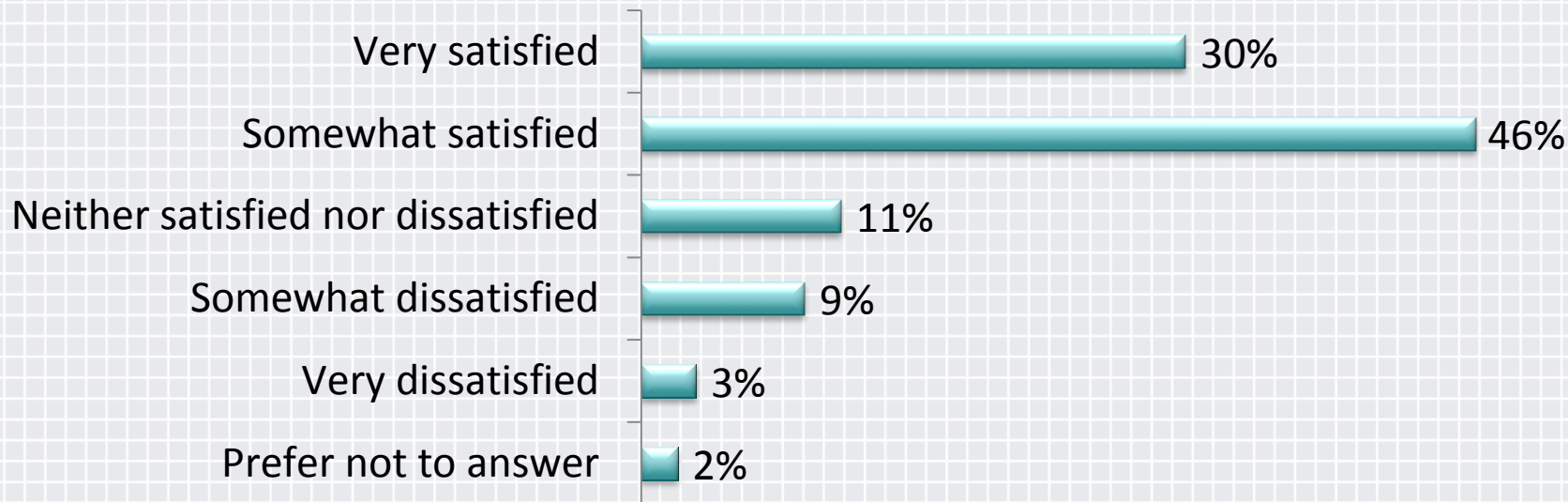


Across the 2011, 2013 and 2015 surveys, churn of nearly 20% is the highest that has been seen.

Workforce Shortage Indicators

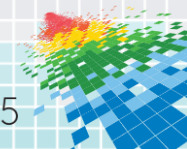
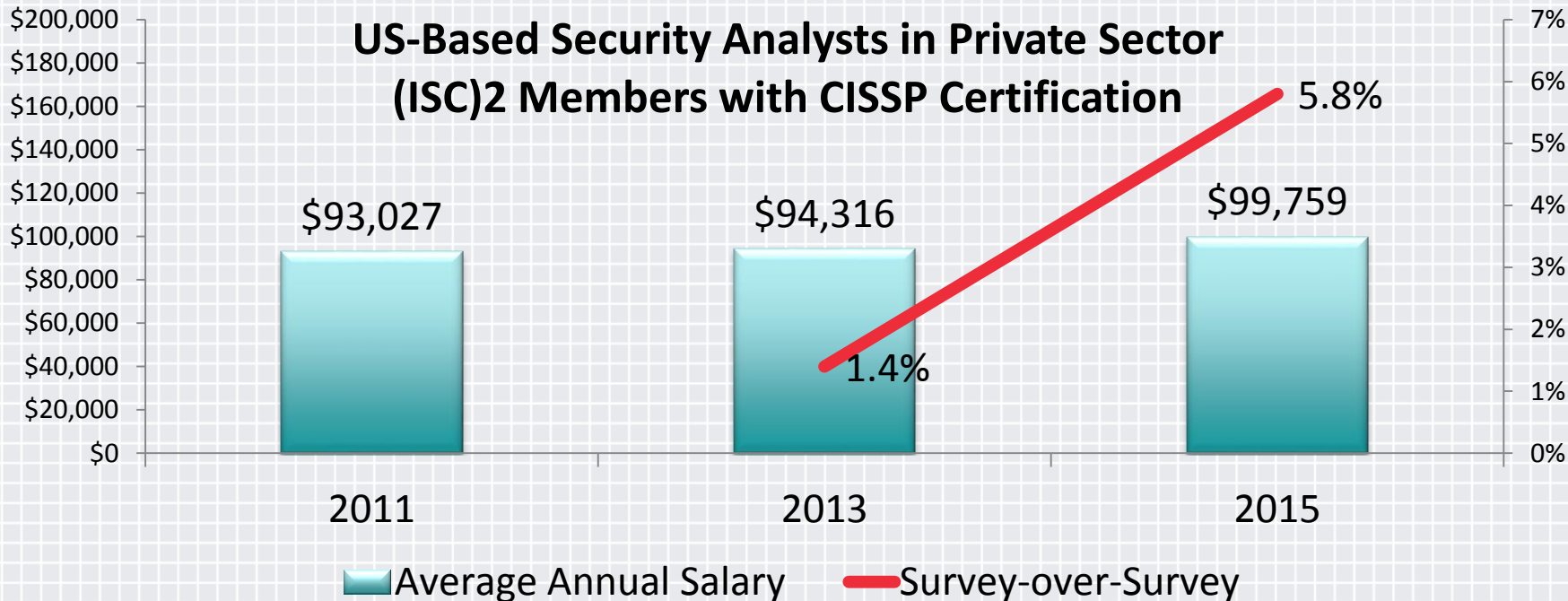
Churn Despite High Satisfaction

**Overall, how satisfied are you in your current position?
(Percent of Survey Respondents)**



Workforce Shortage Indicators

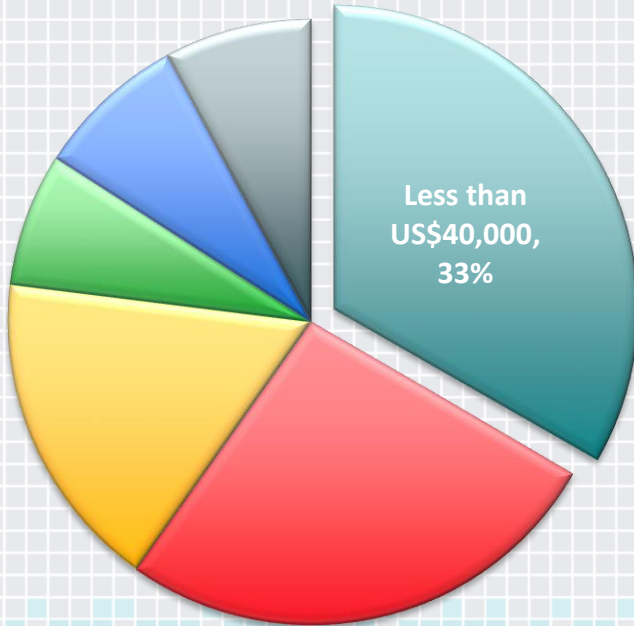
Increasing Compensation



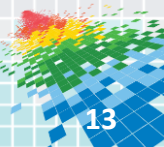
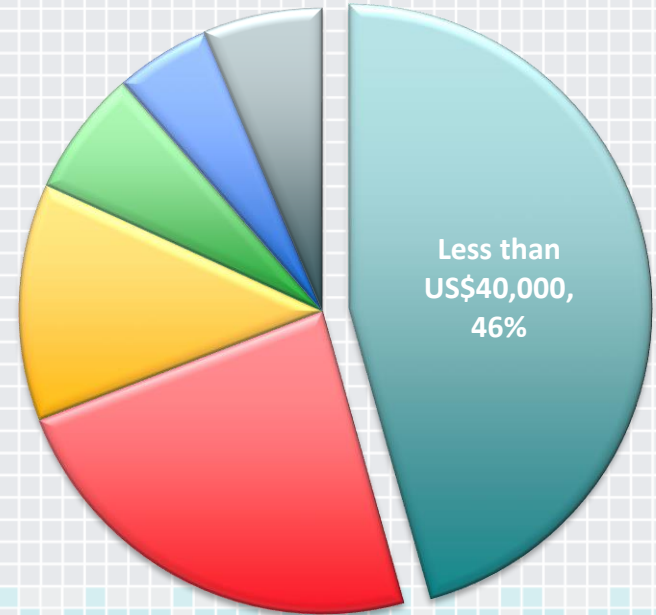
Workforce Shortage Indicators

Increasing Compensation

2015 Salary Distribution for All Security Professionals Americas Developing Countries



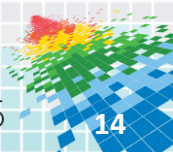
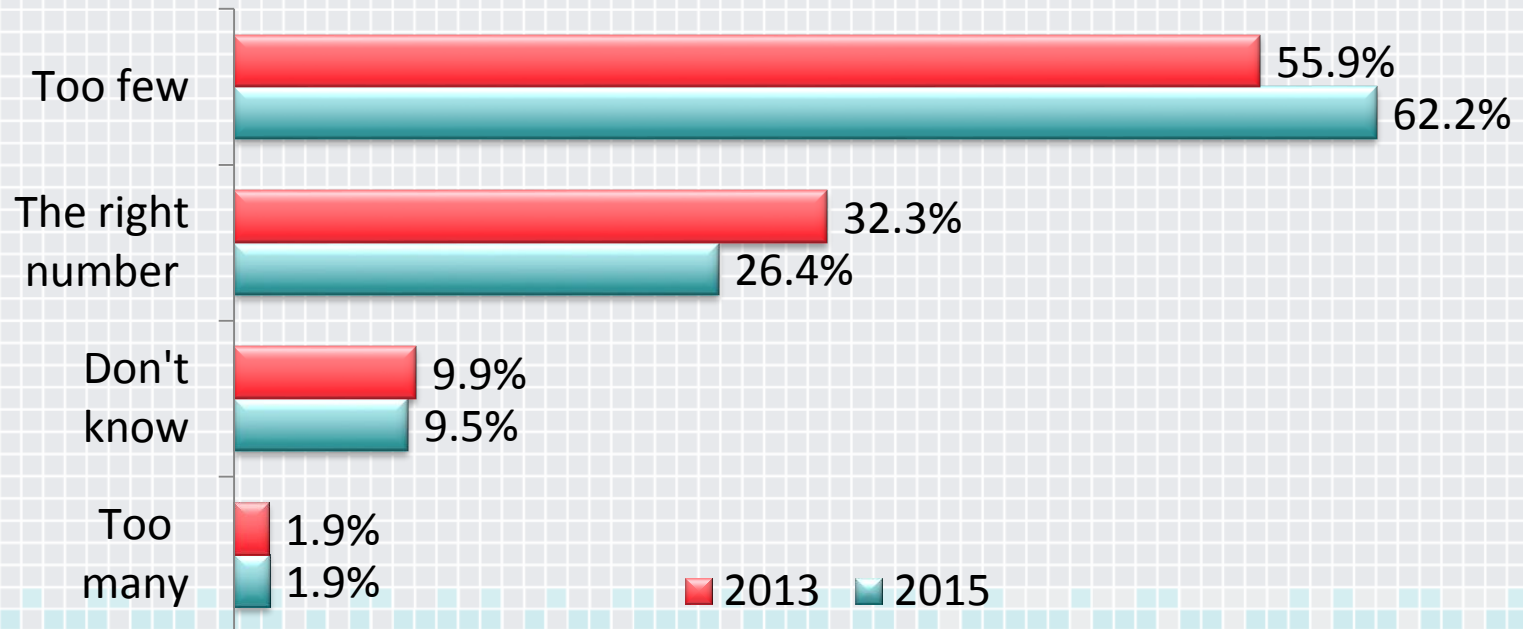
2013 Salary Distribution for All Security Professionals Americas Developing Countries



Workforce Shortage Indicators

Staffing Perceptions

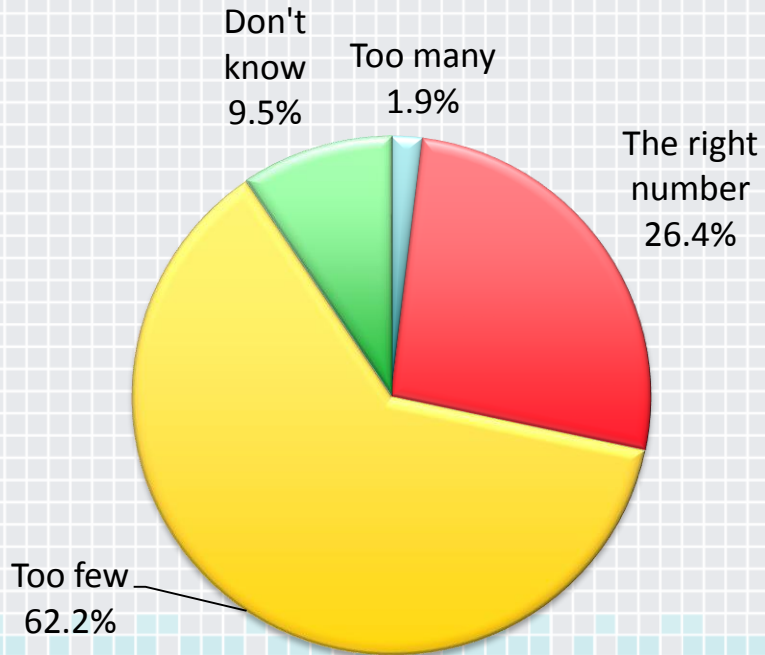
Would you say that your organization currently has the right number of information security workers, too few, or too many?



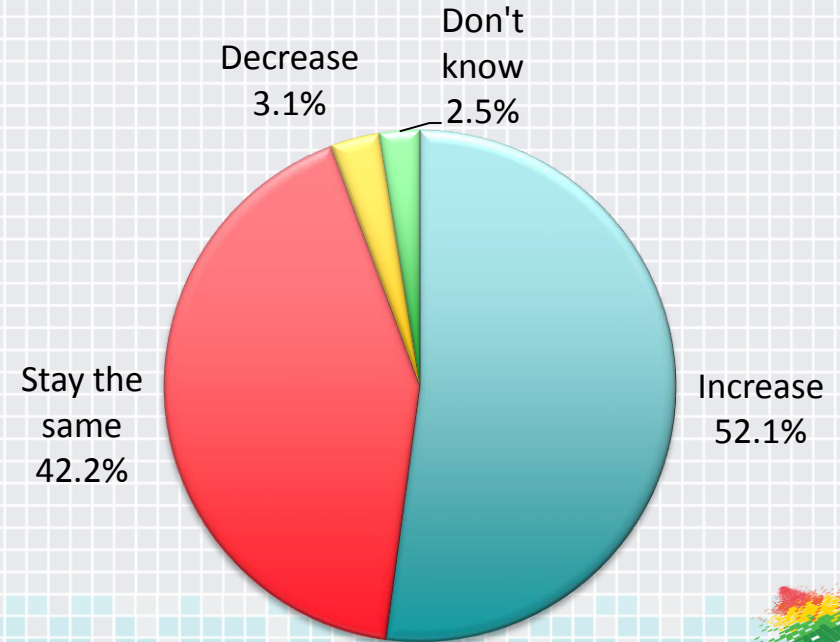
Workforce Shortage Indicators

Staffing Plans Insufficient to Meet Need

Would you say that your organization currently has the right number of information security workers, too few, or too many?

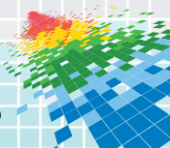
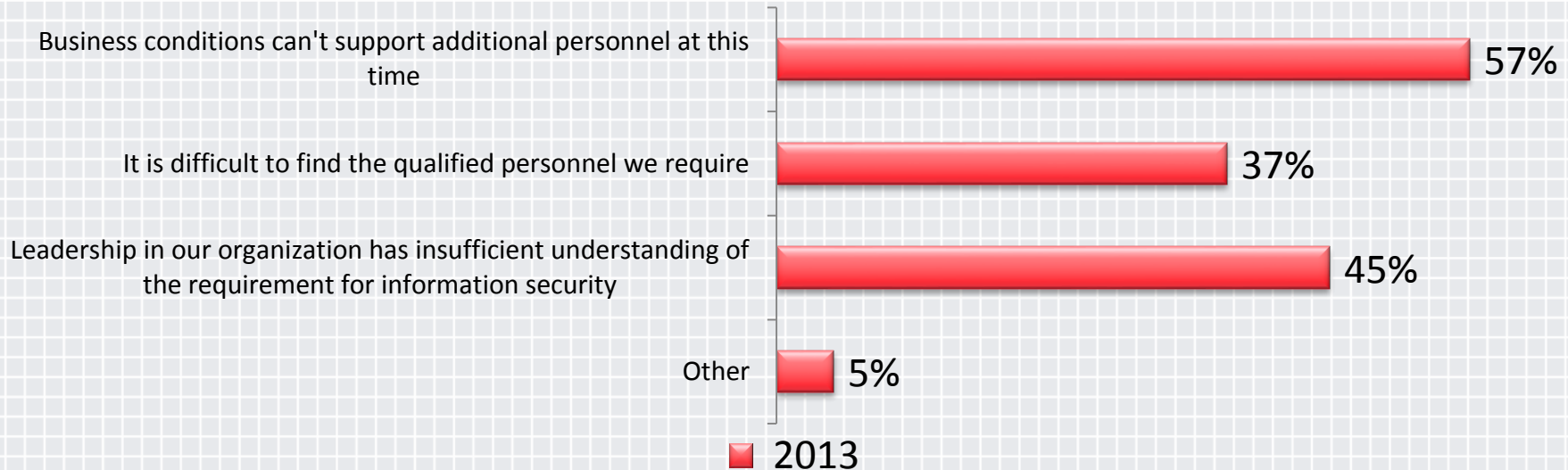


Over the next 12 months, do you expect the number of information security professionals in your organization to increase, decrease or remain the same?



Workforce Shortage Indicators

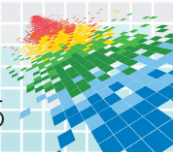
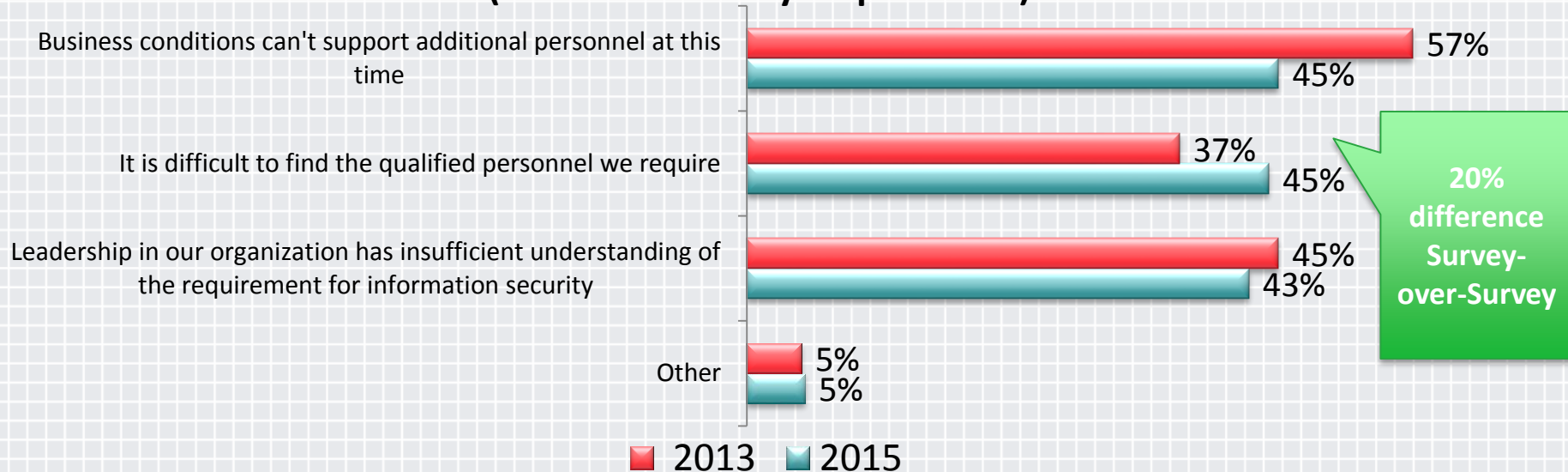
Reasons Why Too Few Information Security Workers (Percent of survey respondents)



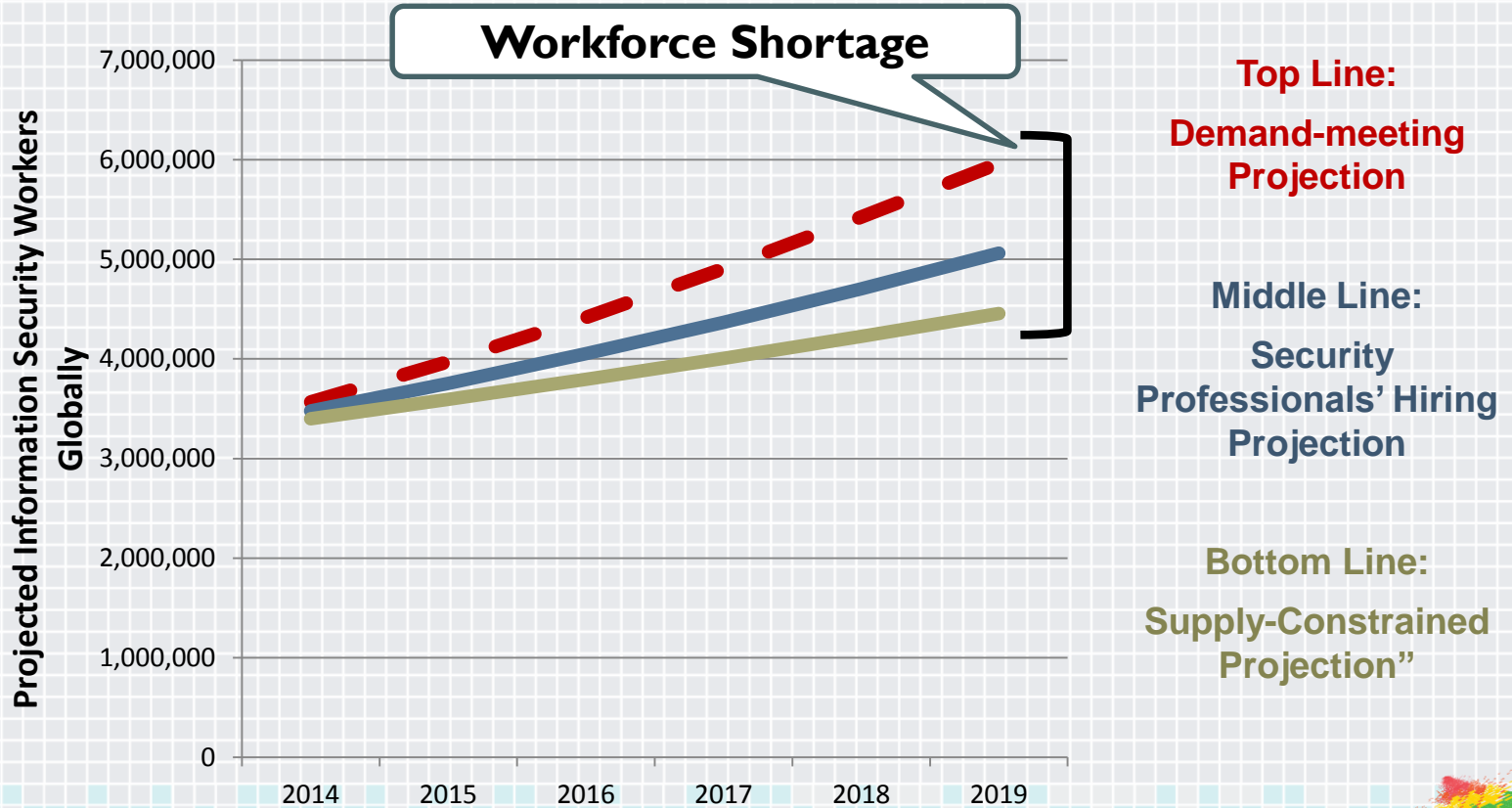
Workforce Shortage Indicators

Difficulties in Locating Qualified Personnel

Reasons Why Too Few Information Security Workers (Percent of survey respondents)



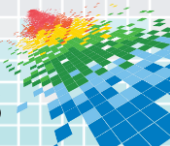
Workforce Size Estimate and Projection



Top Line:
Demand-meeting
Projection

Middle Line:
Security
Professionals' Hiring
Projection

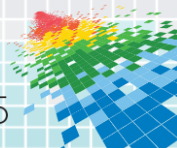
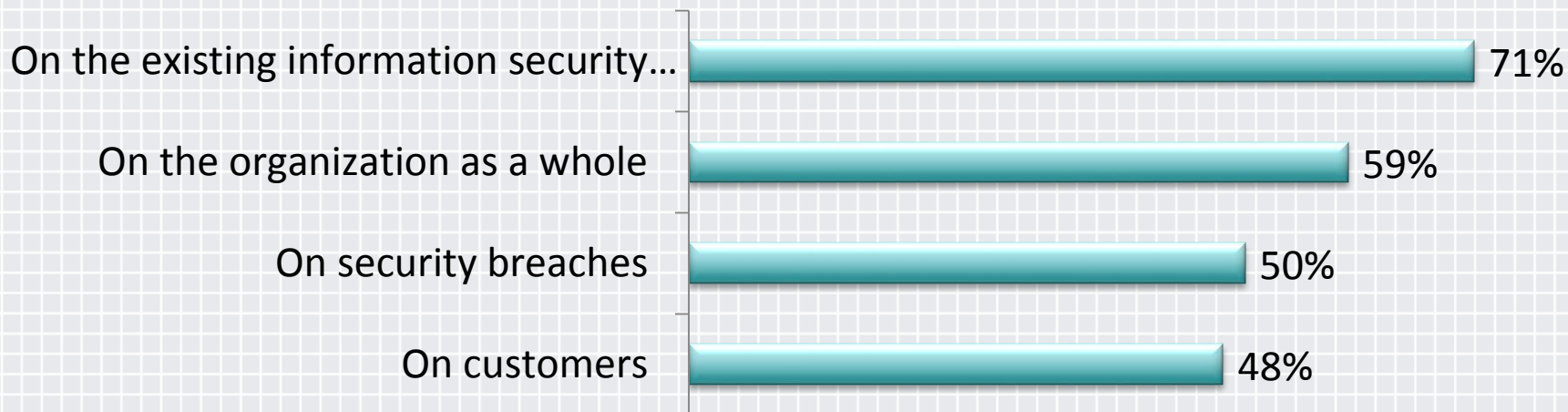
Bottom Line:
Supply-Constrained
Projection"



Workforce Shortage Effects

What is the impact of your organization's shortage of information security workers on each of the following?

(Selected as Top 2 on a 5-point Very Great Impact-to-No Impact at All Scale)



Workforce Shortage Effects

What you can see

Security professional efficiency
& Outsourcing

Technology leverage to reduce
security professional workload

What you can't see

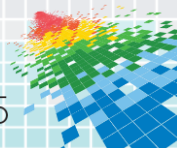
Pushing security tasks to
IT professionals, a force
multiplier

Security tasks are getting
left undone or performed
sub-optimally



Question

At what point do we stop using the term “shortage” and we use the word “crisis” instead?



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The 2015 (ISC)² Global
Information Security Workforce Study

FROST & SULLIVAN

A Frost & Sullivan White Paper
Michael Suby, VP of Research
Frank Dickson, Research Director
Information & Network Security

A Frost & Sullivan Market Study in Partnership with:
(ISC)² Booz | Allen | Hamilton
strategy and technology consultants

NRI SECURE CYBER BIRD

