Fastly Global Security Research 2024

DACH Findings

November 2024

Research conducted by
SAPIO Research

Overview & methodology

The survey was conducted among **200 cybersecurity decision makers** (with **2/3 respondents directly making or influencing cybersecurity decisions**) in businesses **with 500 or more employees in DACH region (Germany, Austria, Switzerland)**. Participants came from a range of roles across the IT, Operations and Executive Leadership functions.

At an overall level results are accurate to ± 6.9% at 95% confidence limits assuming a result of 50%.

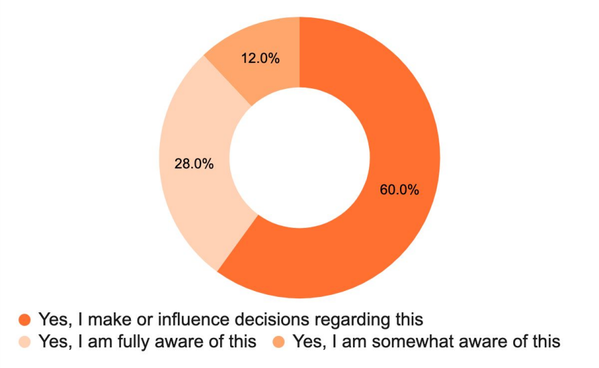
The interviews were conducted online by Sapio Research in September 2024 using an email invitation and an online survey.

Respondent demographics summary – Cybersecurity Decision Makers

Seniority

Department	% of respondents
IT	49%
Operations	29%
Executive leadership	23%

Decision-making



Company Size

No of employees	% of respondents
250-999	21%
1.000-4.999	35%
5.000-24.999	29%
25.000+	17%

Primary sectors of Business

1. Finance / Accounting - 18%
2. Media / Entertainment / Travel & Tourism - 16%
3. Retail / Wholesale - 15%
4. Healthcare / Life Sciences - 14%
5. Manufacturing - 7%
6. Telecommunications / ISP / Web Hosting - 7%

Country of residence



Key takeaways

Key stats

Companies expect it to take **6.47 months** to recover from security incidents

Businesses have experienced an average of **41** security incidents in the past year, with the top factors present being **external attackers** (36%) and **Misconfiguration** (29%)

Businesses report being reliant upon an average of **8** cybersecurity solutions, with **38%** of these cybersecurity solutions overlapping in their primary function

Organisations predict that **social engineering attacks** (38%) and **a lack of relevant technical skills** (31%) will be their biggest cybersecurity threats in the next 12 months

Revenue loss was one of the top impacts of security incidents **(22%)**, with those reporting this suffering an average **3.3%** loss following a security incident

Almost three quarters (72%) say that consolidation of security solutions is more appealing due to tighter budgets

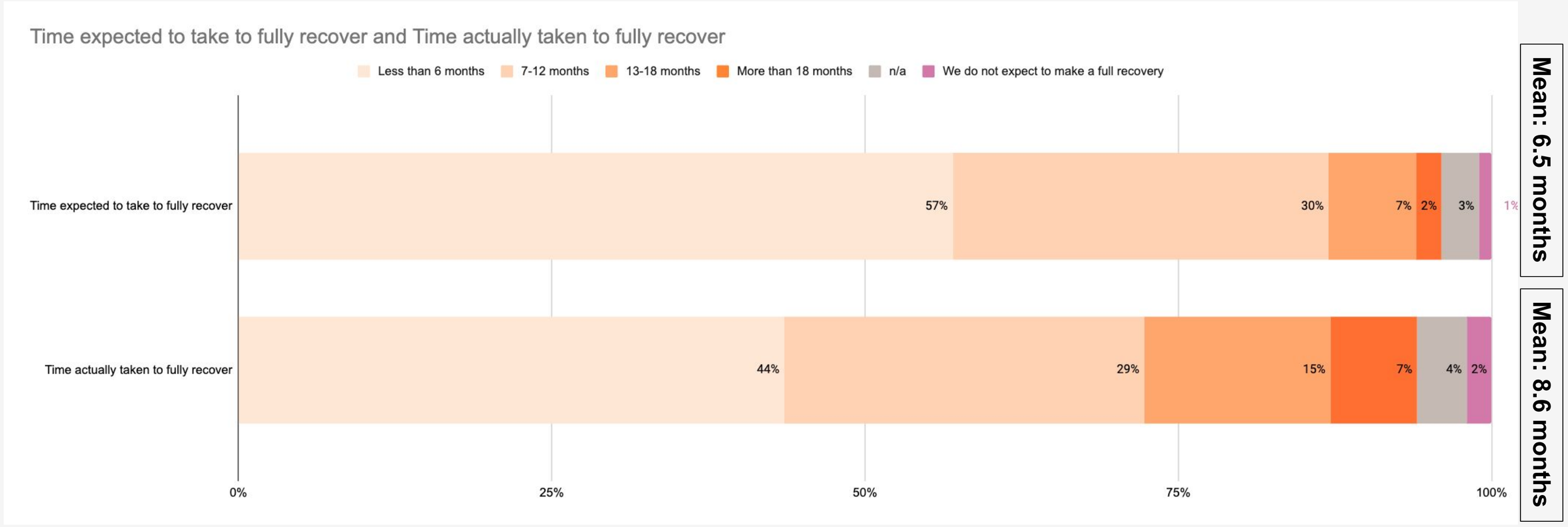
Main findings

Main Findings

Incident response time and recovery

Expected vs. Actual Recovery Time Following a Security Incident

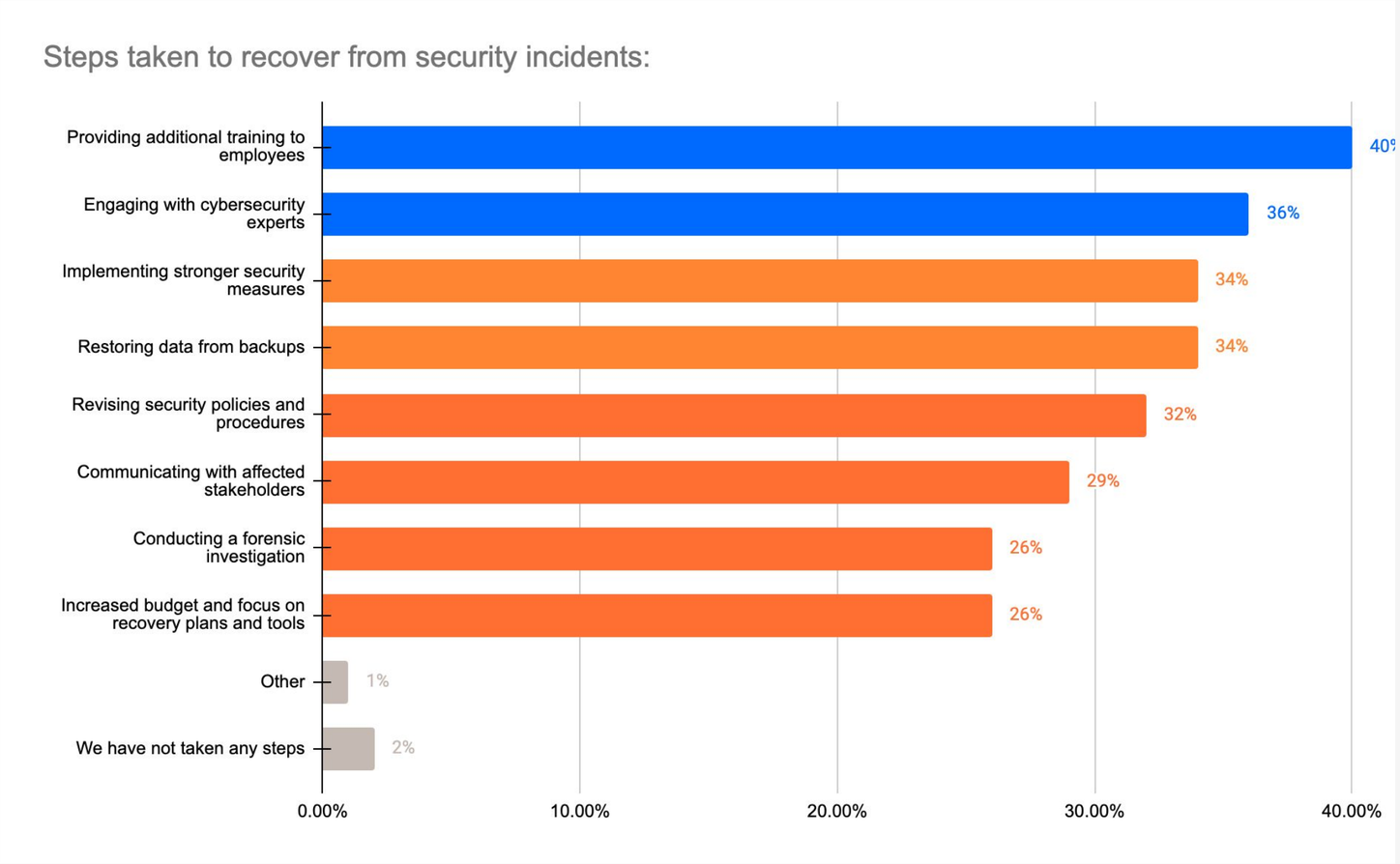
The average time taken for organisations to recover from a security incident is 8.6 months, 2.1 months longer than the average business anticipates



Q17e. How long do you expect it to take, and how long has it taken, to fully recover from each of these impacts? | Base: 183 *Only asked to those who have experienced a security incident in the last 12 months

Steps Taken Toward Security Incident Recovery

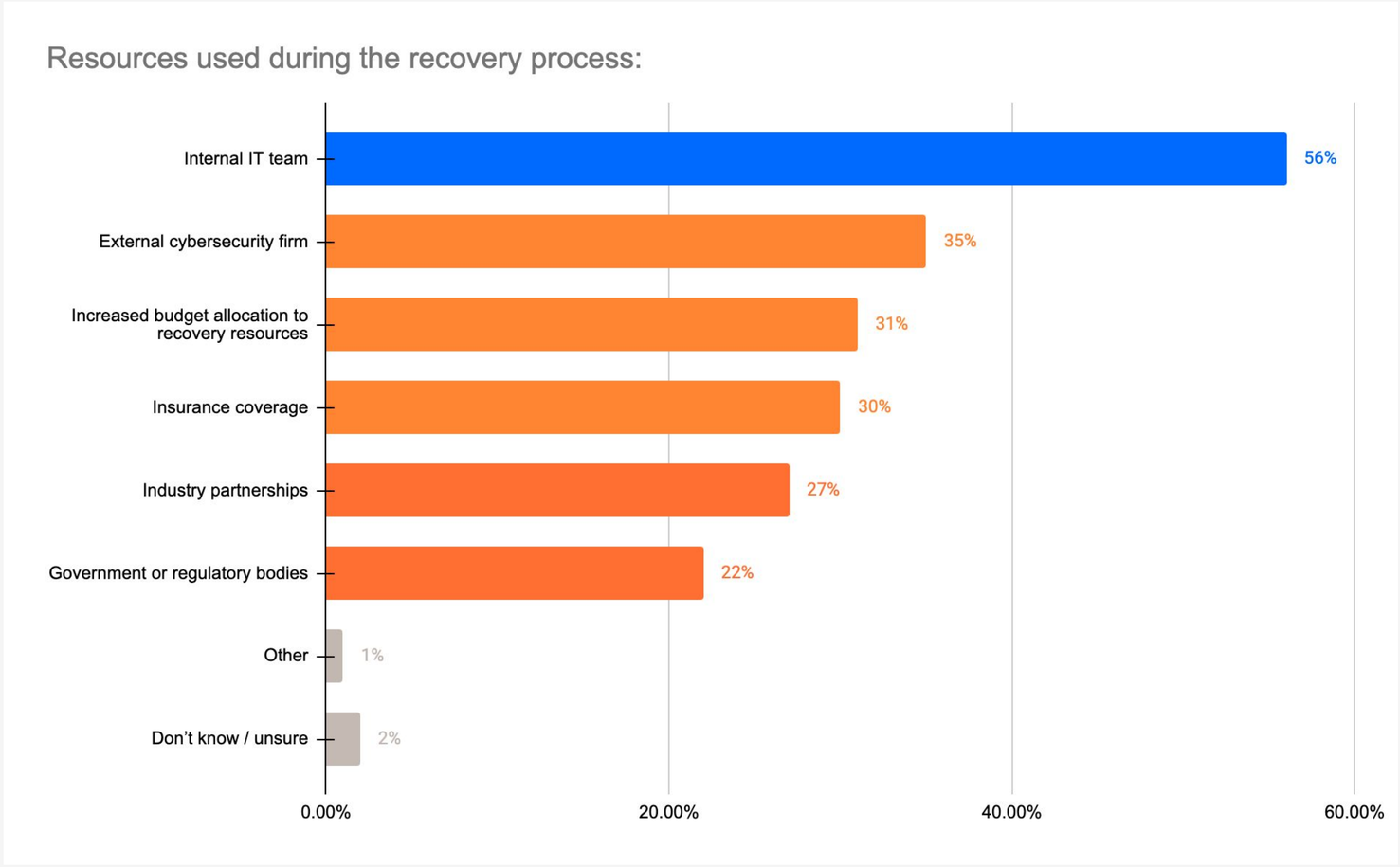
The most common steps businesses are taking to recover from security incidents are providing additional training to employees (40%) and engaging with cybersecurity experts (36%)



Q18. What steps has your business taken to recover from the security incident? Select all that apply | Base: 183 *Only asked to those who have experienced a security incident in the last 12 months

Resources Used for Security Incident Recovery

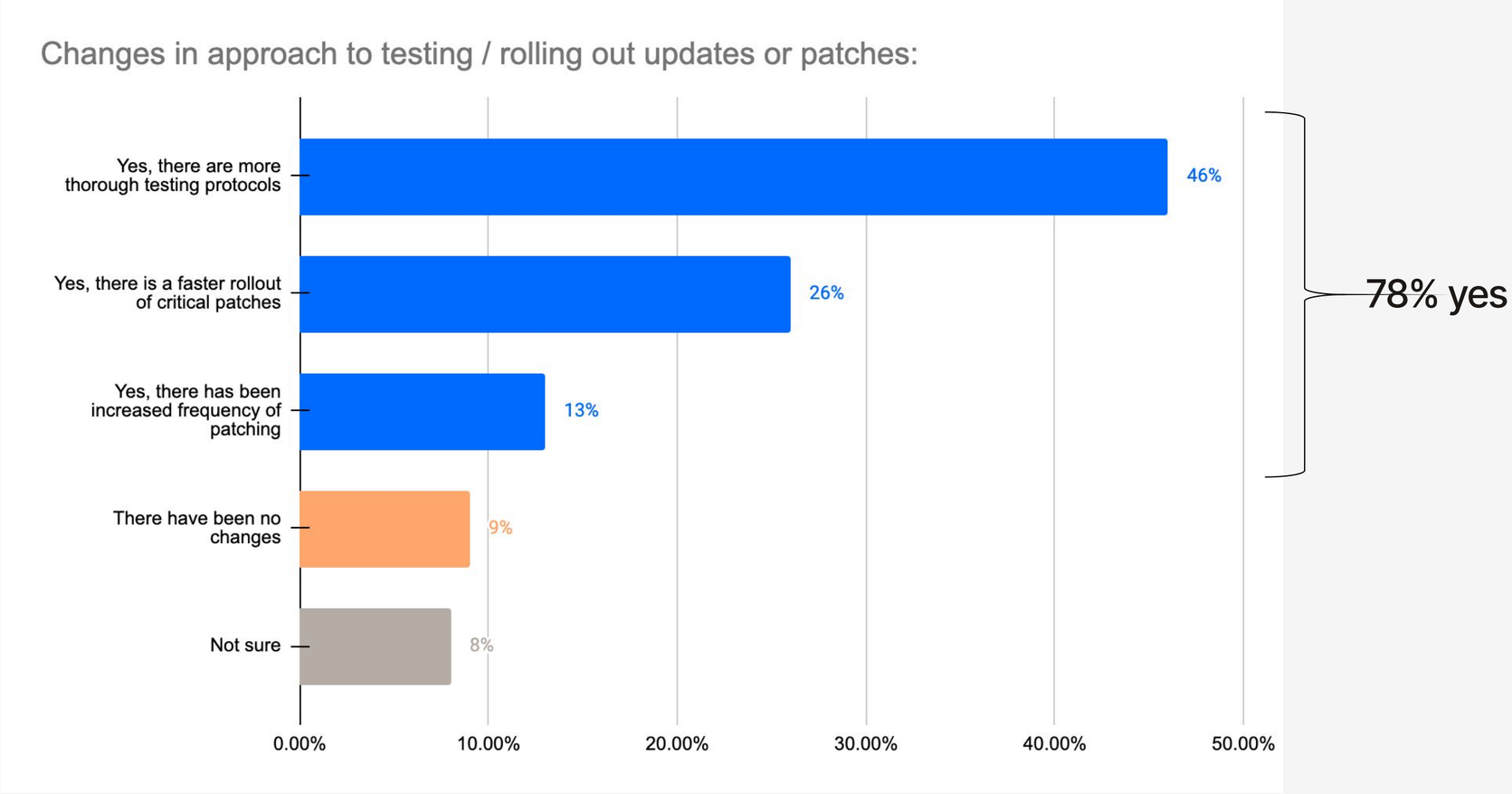
Most businesses are opting to use their internal IT team (56%) for recovery following a security incident



Q19. What resources did your business use for recovery? Select all that apply | Base: 180 (only asked to those who have taken step towards business recovery)

Changes in Approach to Updates and Patch Testing

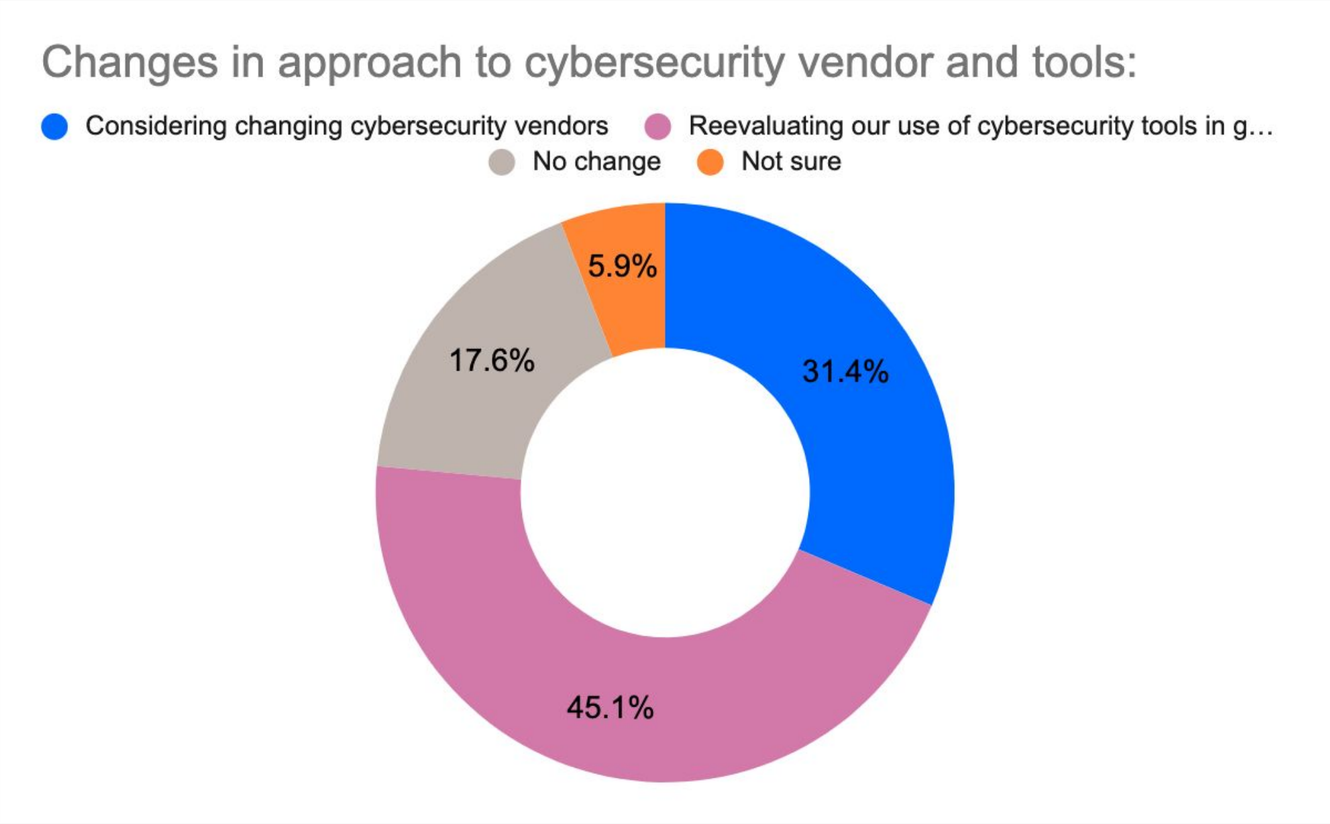
84% report that recent reliability incidents have encouraged their business to change their approach to testing or rolling out updates or patches



Q20. In response to recent reliability incidents like the CrowdStrike outage, has your business changed its approach to testing or rolling out updates or patches? Select one | Base: 200

Approach to Cybersecurity Vendors and Tools

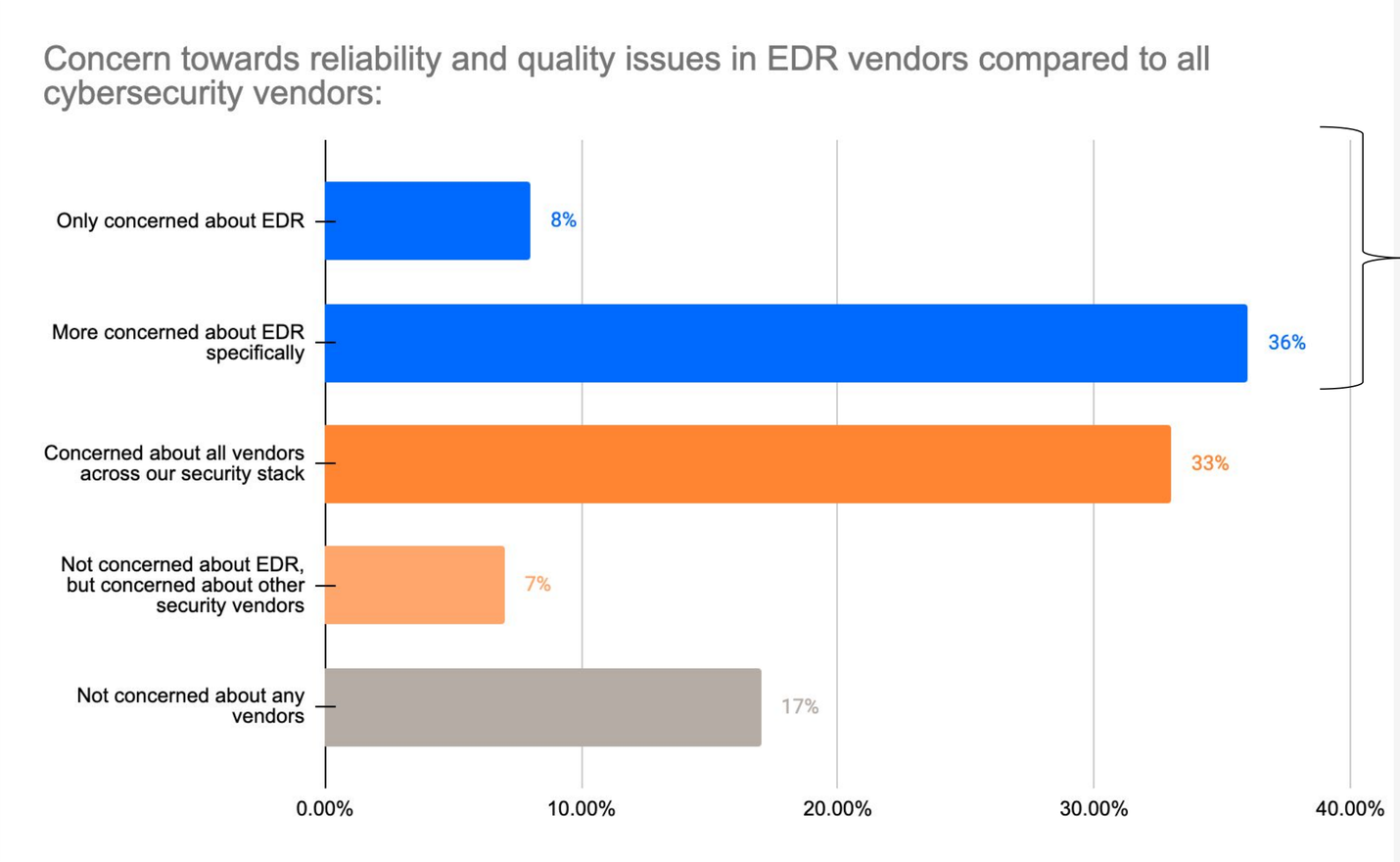
46% are re-evaluating their use of cybersecurity tools in general, following the recent Crowdstrike outage, with a further 32% considering changing cybersecurity vendors



Q21. In response to recent reliability incidents like the CrowdStrike outage, has your business changed its approach to cybersecurity vendors and tools?
Select one | Base: 200

Concerns About Reliability in EDR Vendors

83% are concerned about the reliability and quality of their vendors, with a split between those concerned about all vendors in their security stack (33%) and those more concerned about EDR (44%).



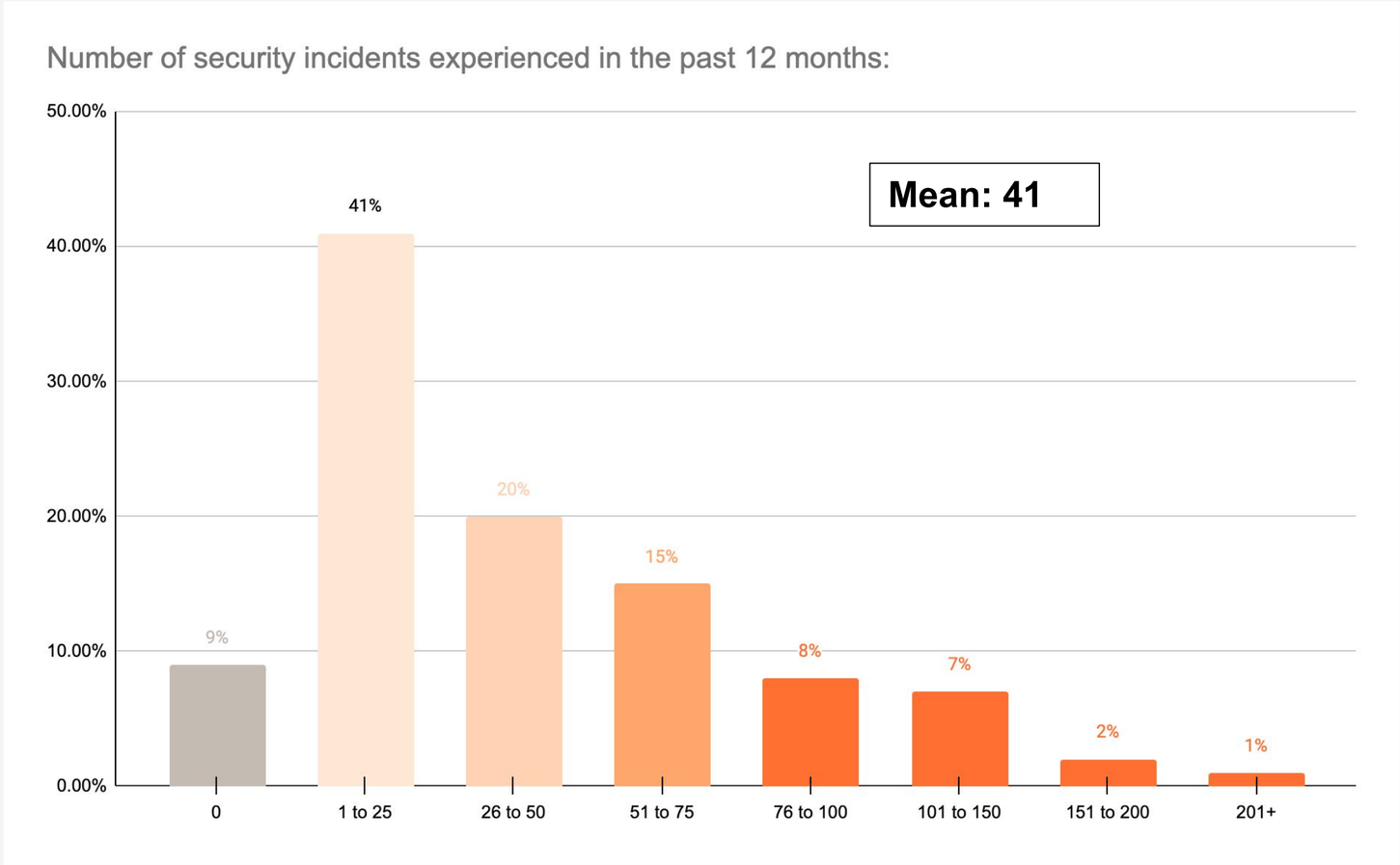
Q22a. In response to the Crowdstrike outage, to what extent are you concerned about reliability and software quality issues in EDR vendors vs all cybersecurity vendors? Select one | Base: 200

Main Findings

The attack landscape

Number of Security Incidents in the Past Year

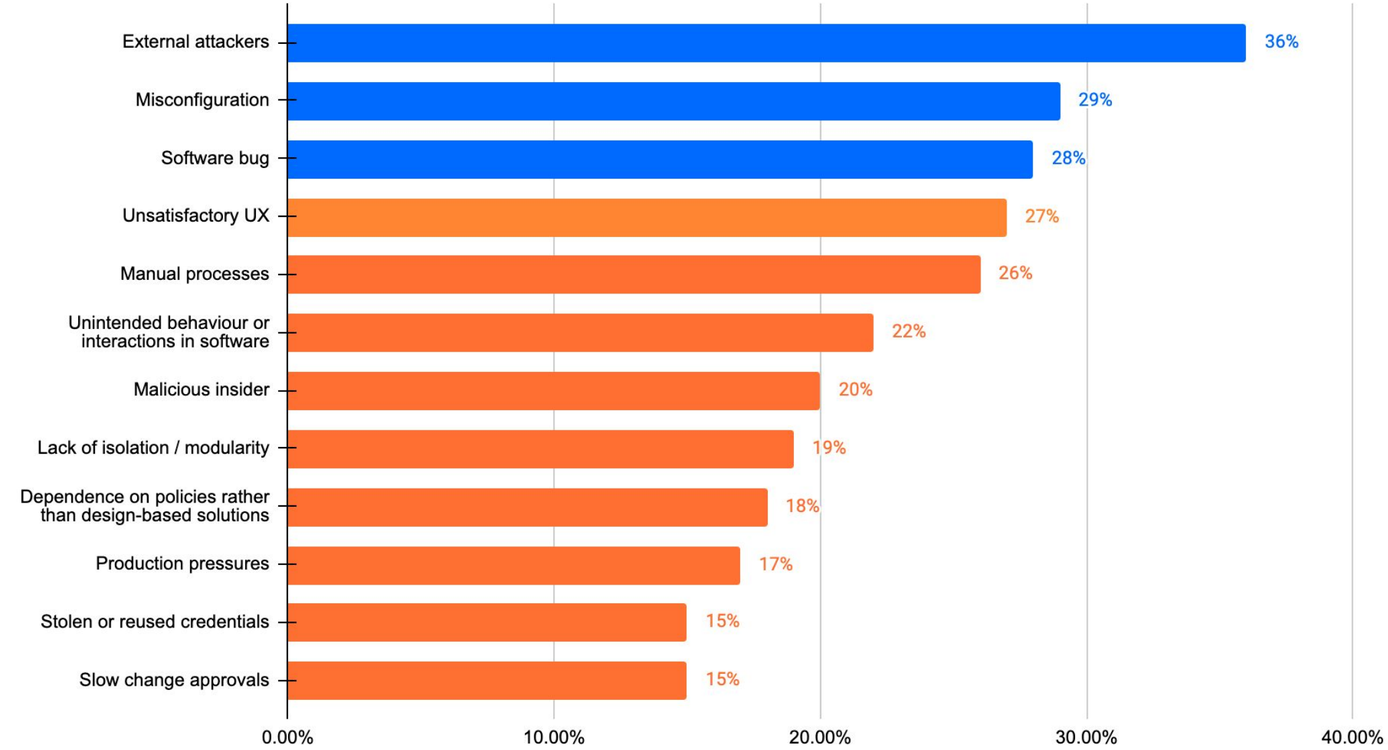
On average, businesses have experienced 41 security incidents in the past 12 months



Q15. How many security incidents, including those caused by human error, has your business experienced in the past 12 months? Select one| Base: 200

Factors Present in Security Incidents

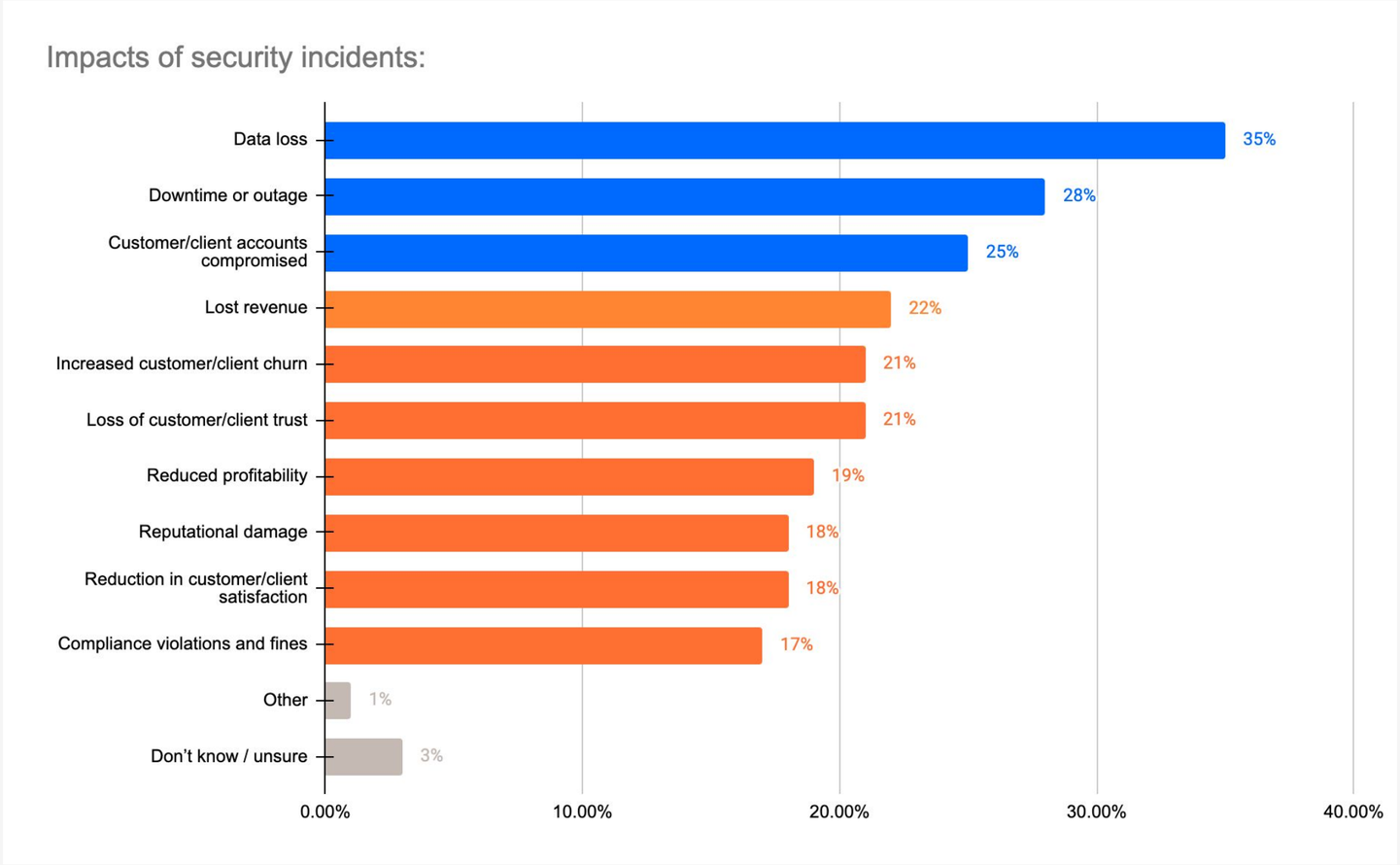
The top factors present in security incidents were external attackers (36%), misconfiguration (29%), and software bugs (28%)



Q16. Which of the following factors were present in the security incident? Select all that apply | Base: 183 *Only asked to those who have experienced a security incident in the last 12 months

Main Impacts of Security Incidents

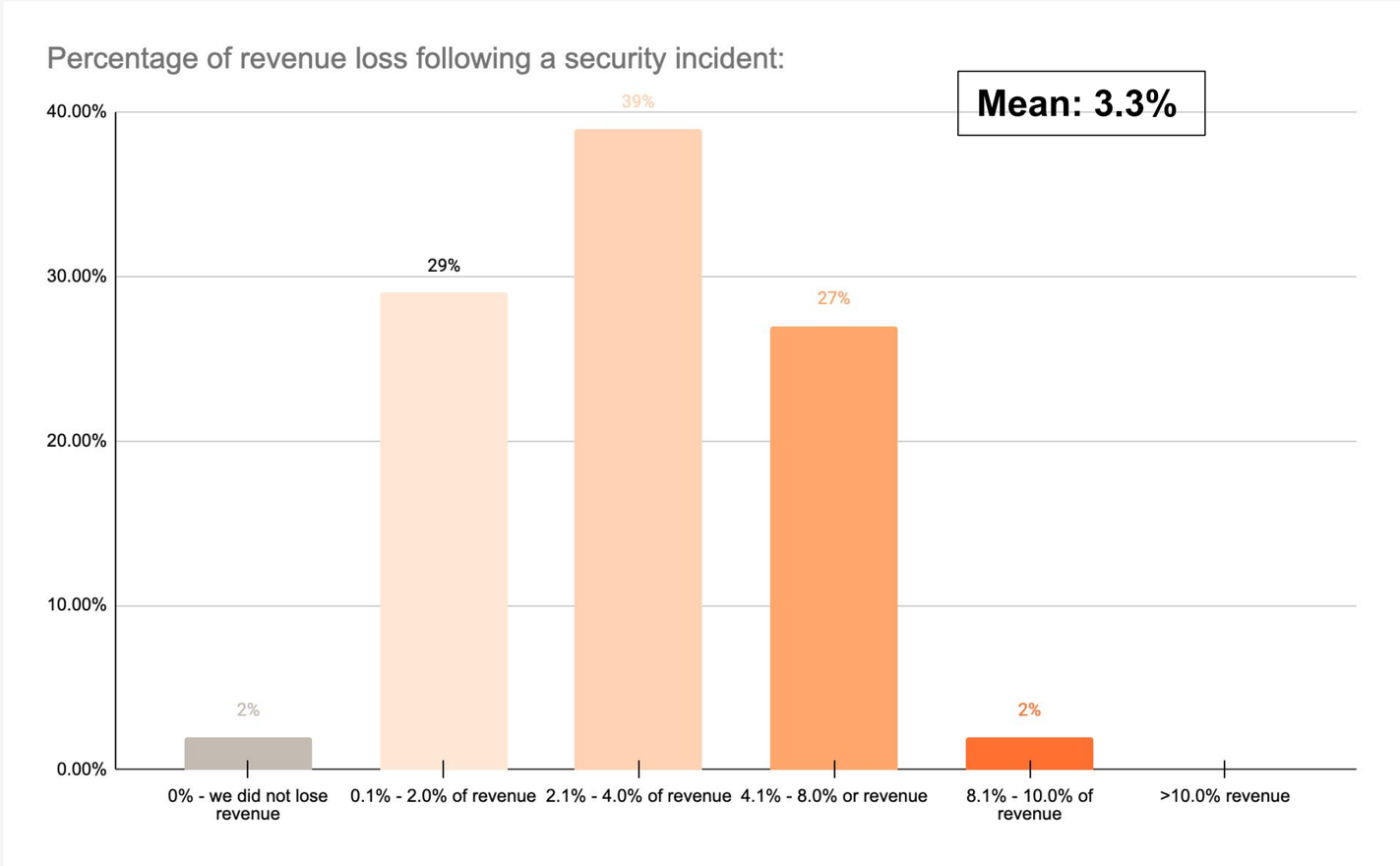
The top impacts of security incidents are data loss (35%), downtime or outage (28%) and customer/client accounts being compromised (25%)



Q17a. What were the main impacts of the security incident? Select top three | Base: 183 *Only asked to those who have experienced a security incident in the last 12 months

Revenue Loss from Security Incidents

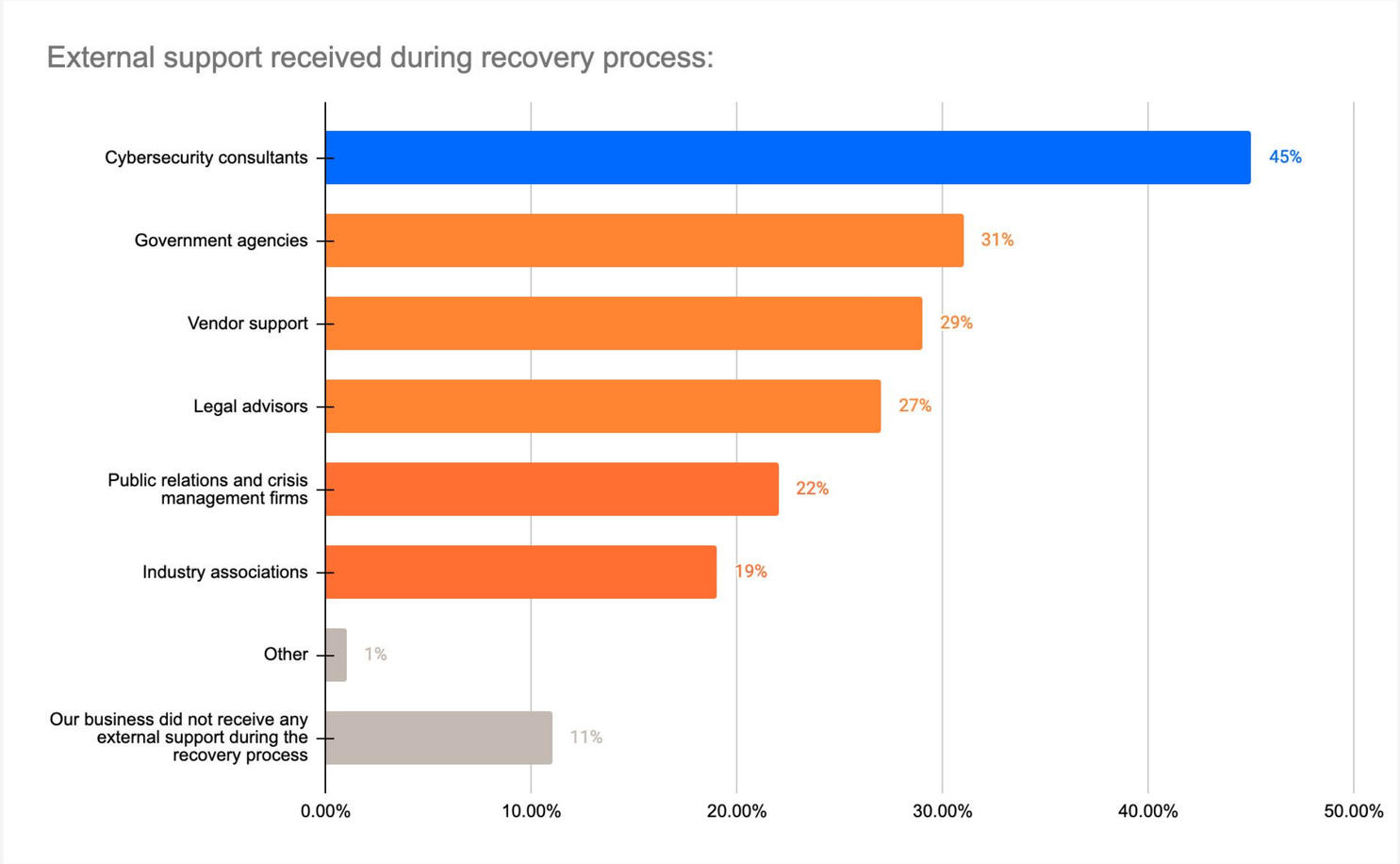
Amongst those who report revenue loss as a top impact of security incidents, businesses report losing an average of 3.3% of their revenue



Q17b. Approximately what percentage of your revenue did you lose as a result of a security incident? Select one | Base: 41 *Only asked to those who lost revenue as a result of security incidents

External Support During Recovery

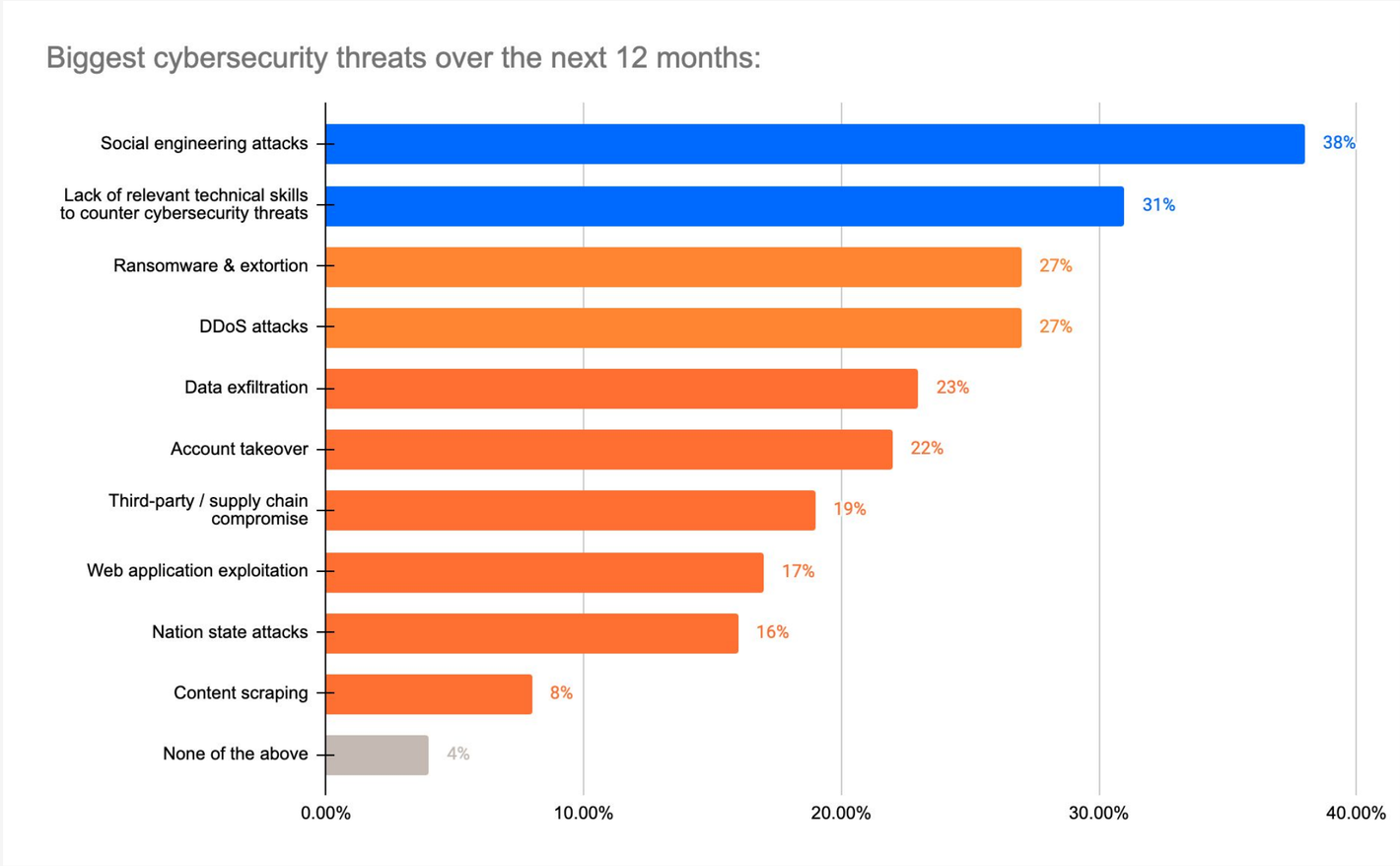
45% say their business utilised cybersecurity consultants during the recovery process



Q22b. What external support or assistance, if any, did your business receive during the recovery process? Select all that apply | Base: 200

Predicted Biggest Cybersecurity Threats

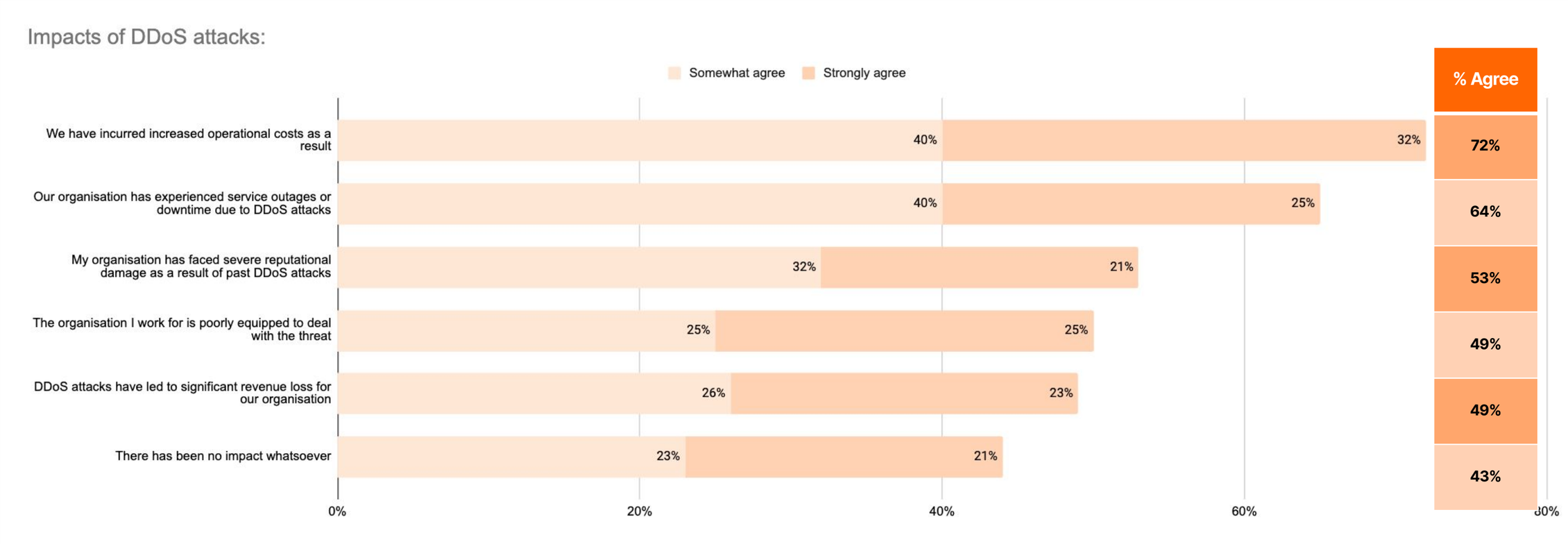
Organisations predict that social engineering attacks (38%) and a lack of relevant technical skills (31%) will be their biggest cybersecurity threats in the next 12 months



Q1a. What do you predict will be the biggest cybersecurity threat to your organisation over the next 12 months? Select top three | Base: 200

Impacts of DDoS Attacks

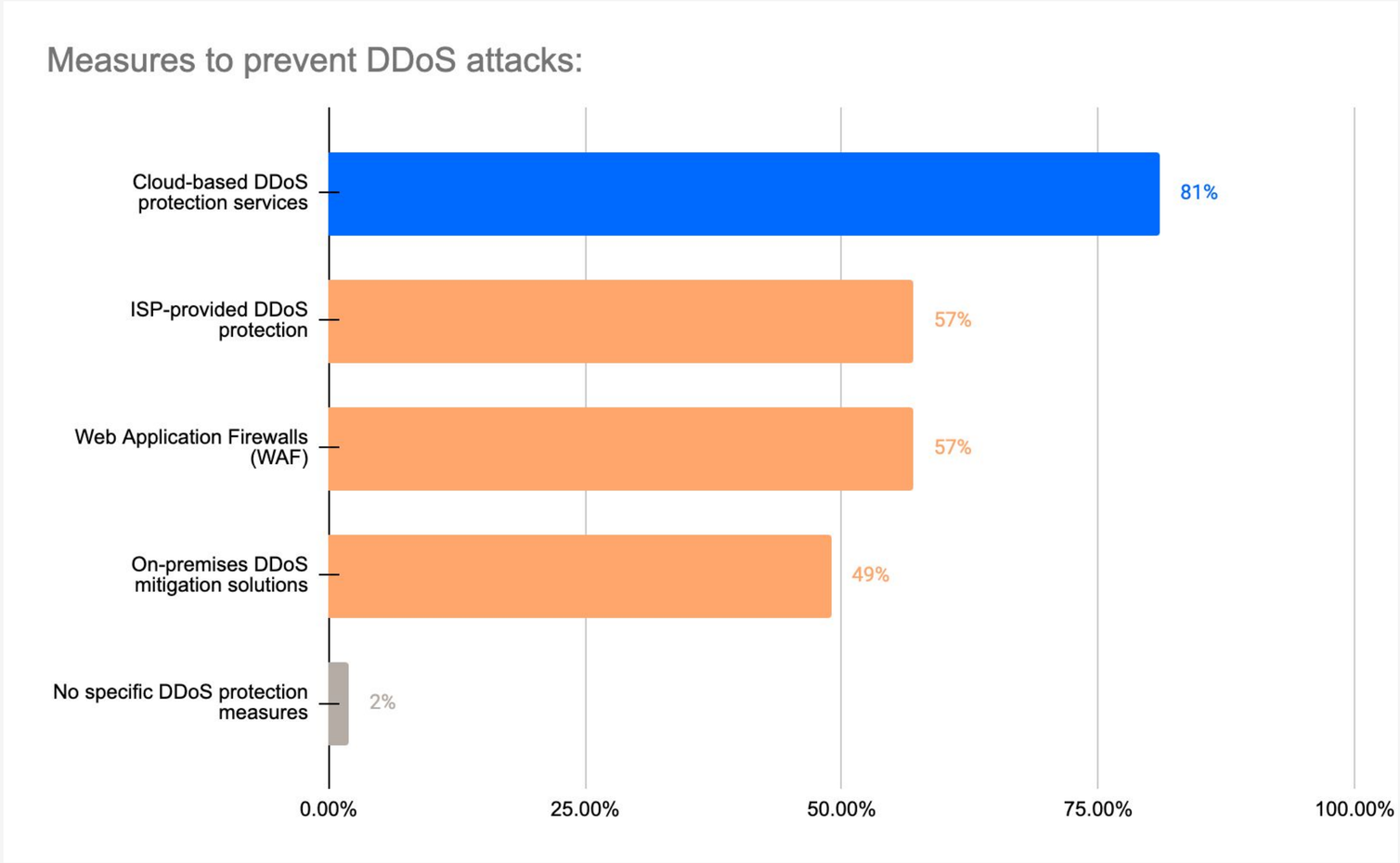
Decision makers who think DDoS attacks will be one of the biggest threats over the next 12 months are likely driven by the significant negative impacts of DDoS attacks, with 72% saying they result in increased operational cost



Q1b. To what extent do you agree or disagree with the following statements? | Base: 53 *Only asked to those who believe DDoS attacks are a threat

DDoS Protection Measures

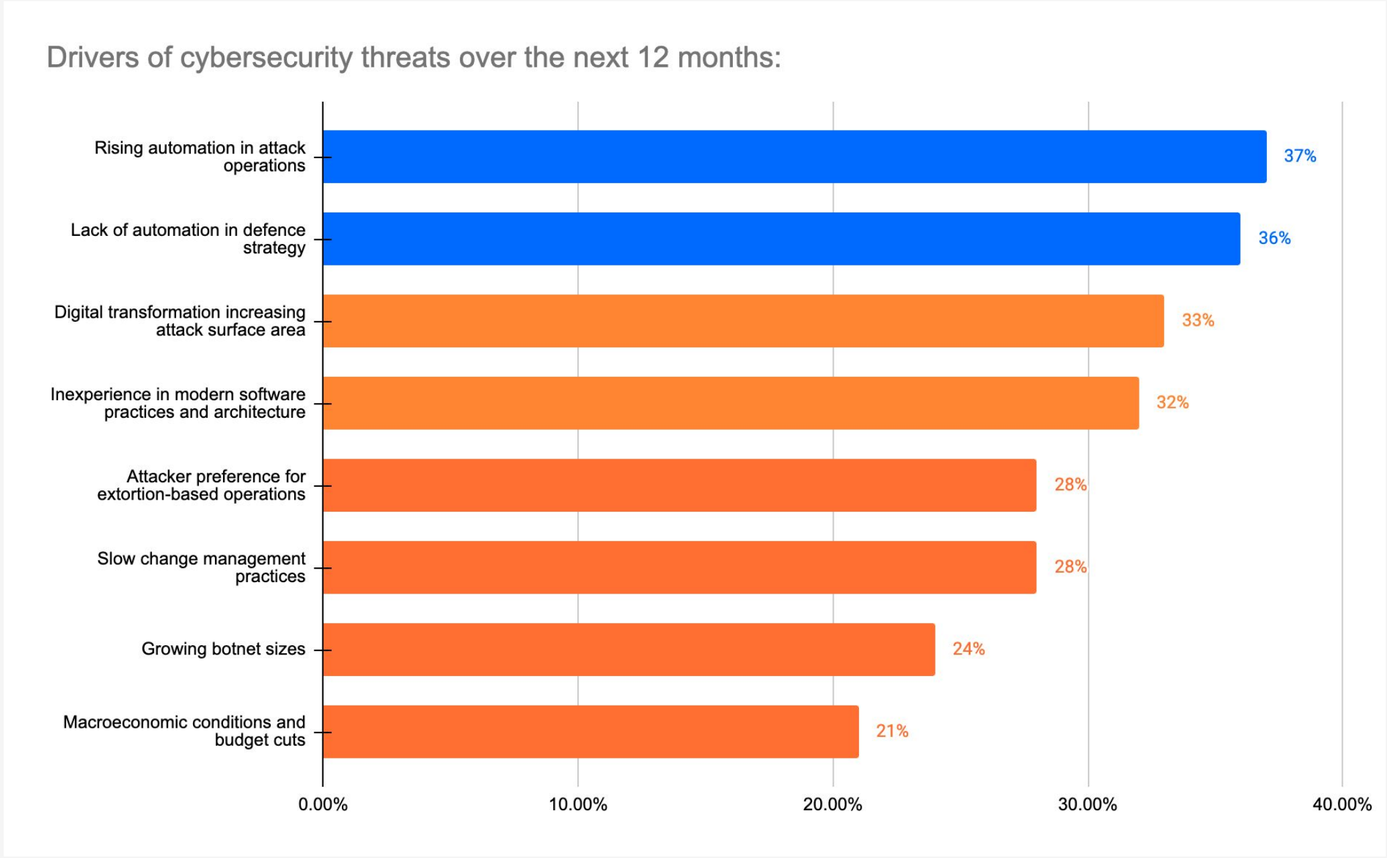
Organisations are most commonly using cloud-based DDoS protection services (81%) to combat DDoS attacks



Q1c. What measures does your organisation currently use for DDoS protection? Select all that apply | Base: 53 *Only asked to those who believe DDoS attacks are a threat

Drivers of Future Cybersecurity Threats

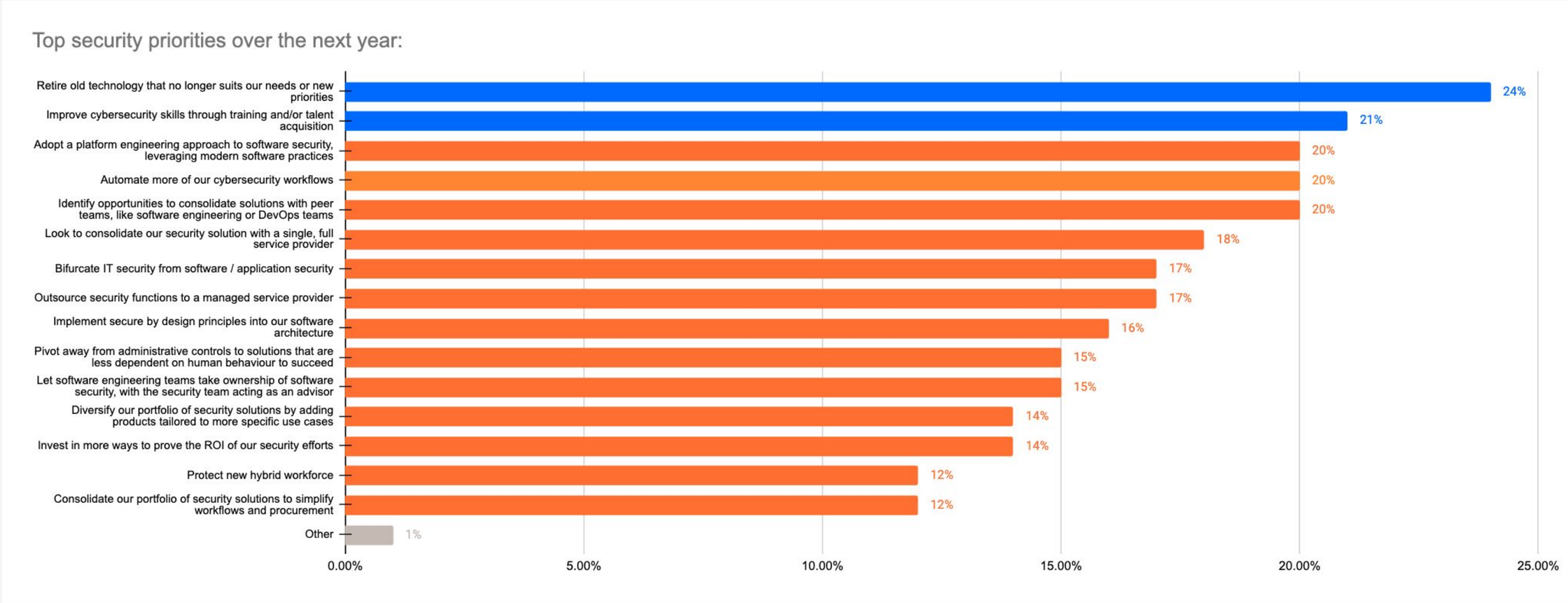
Looking ahead, decision makers believe that rising automation in attack operations (37%) and a lack of automation in their defence strategy (36%) will be the biggest drivers of cybersecurity threats



Q3. Which of the following do you predict will drive cybersecurity threats to your business over the next 12 months? Select top three | Base: 200

Security Priorities for the Next Year

Organisations' top security priorities for the next year revolve around improving cybersecurity skills (21%) and getting rid of old technology (24%)



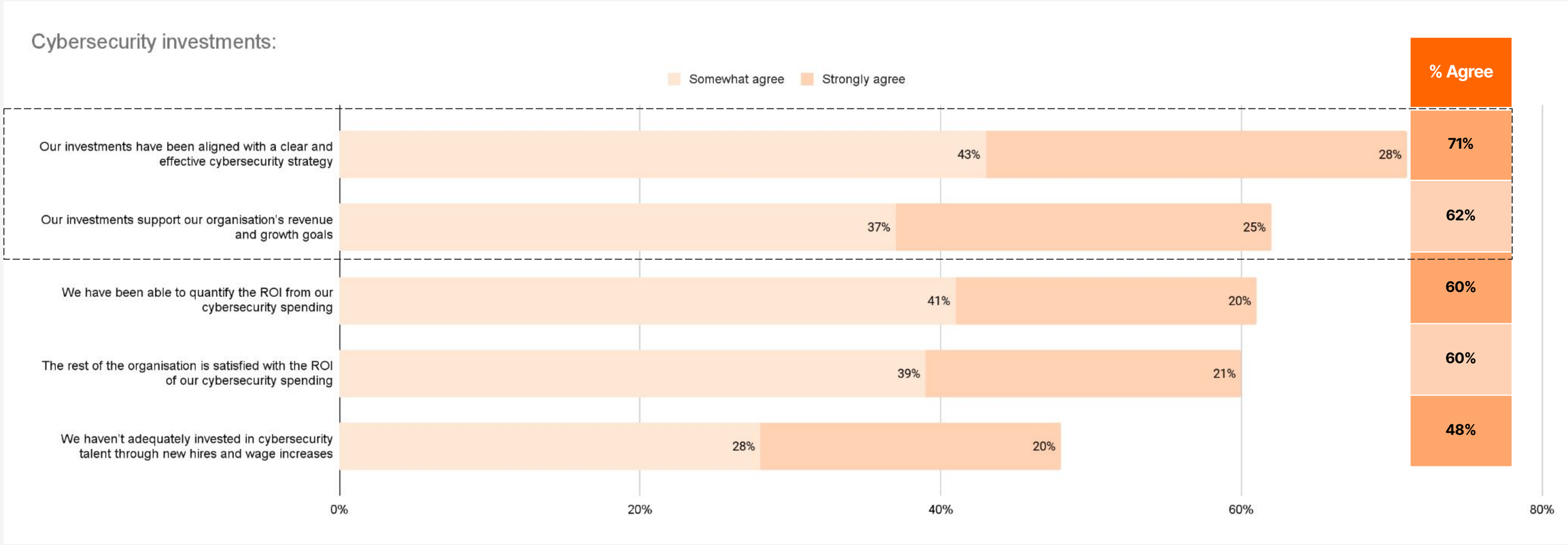
Q14. What are your organisation's security priorities over the next year? Select top three | Base: 200

Main Findings

Is cybersecurity spending falling behind?

Investment in Cybersecurity

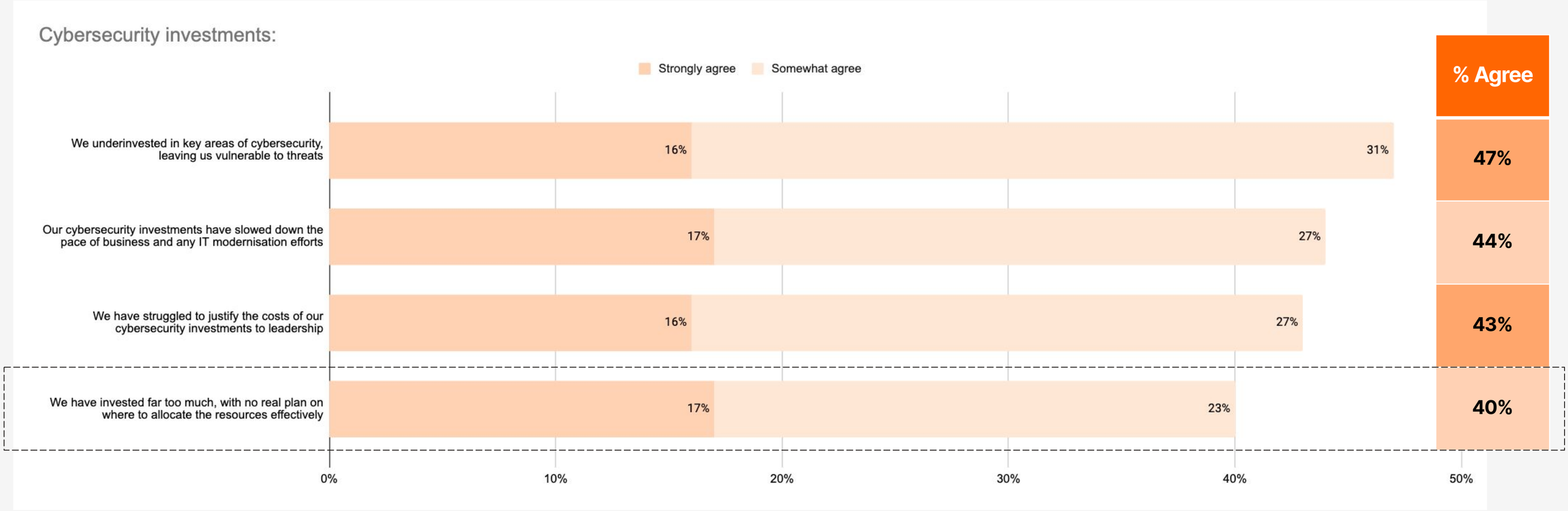
62% agree that their investments in cybersecurity support their organisation's revenue and growth goals, with a further 71% agreeing that these investments are aligned with a clear and effective cybersecurity strategy...



Q6j. Thinking about the investment you made to prepare for cybersecurity risk over the past 12 months, to what extent do you agree or disagree with the following statements? | Base: 200

Investment in Cybersecurity

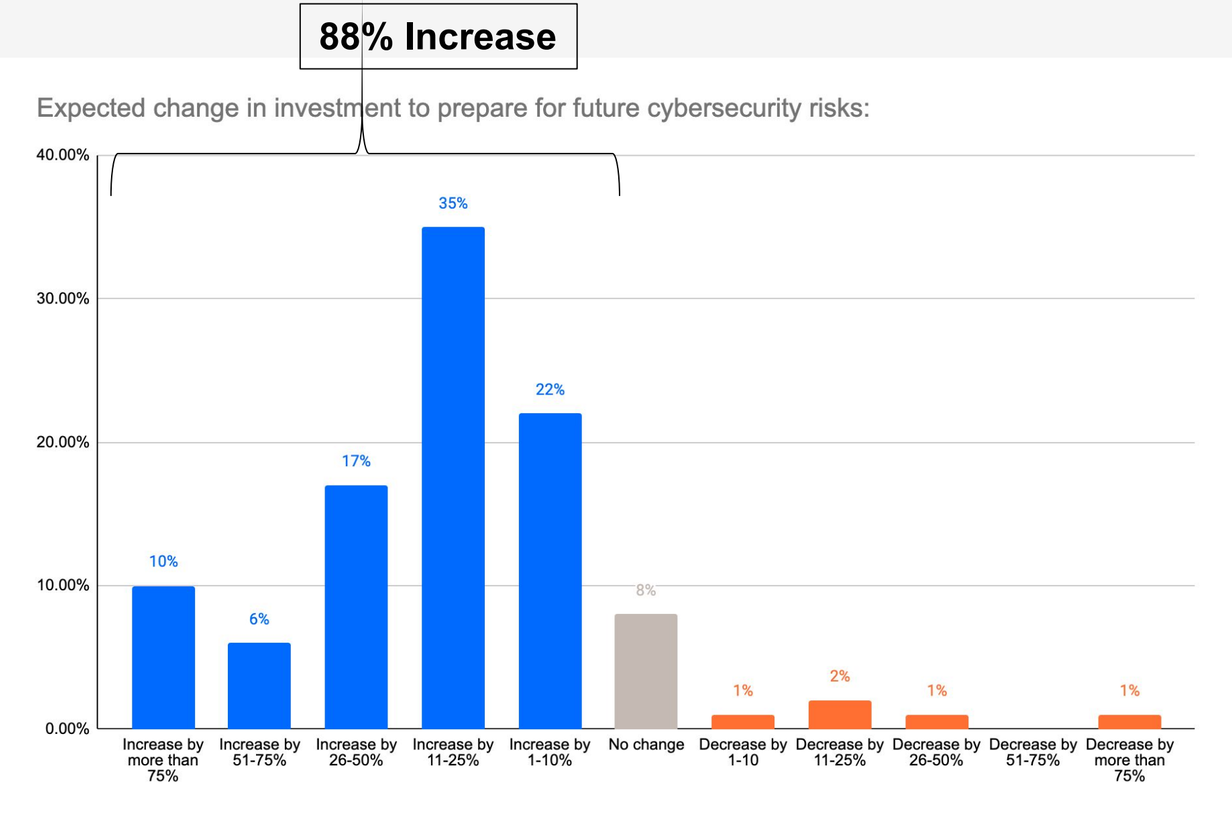
...furthermore, just 40% agree that they have invested too much, with no real plan on where to allocate the resources effectively, demonstrating that organisations are actively preparing for future cybersecurity risks



Q6j. Thinking about the investment you made to prepare for cybersecurity risk over the past 12 months, to what extent do you agree or disagree with the following statements? | Base: 200

Future Cybersecurity Investment Changes

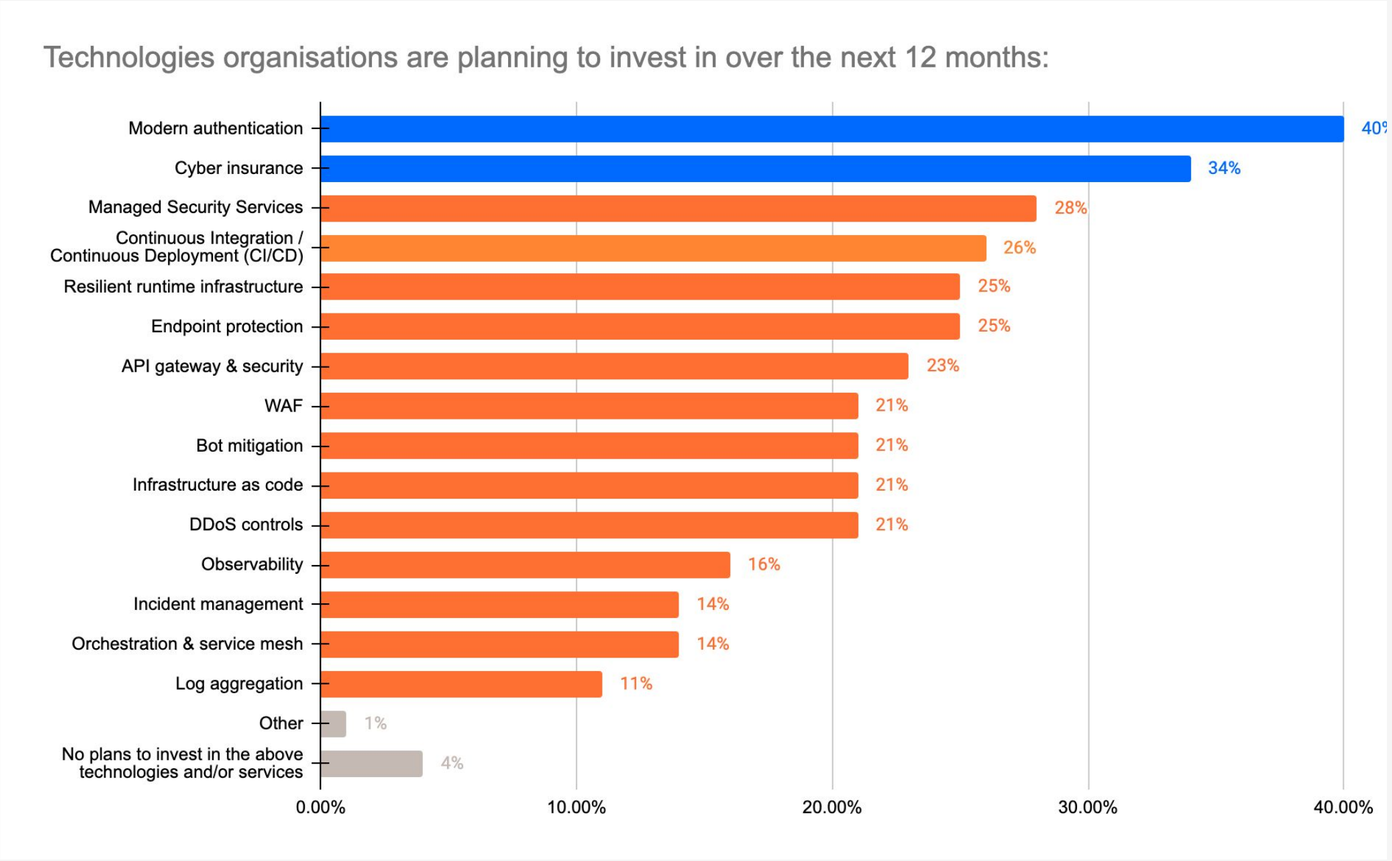
88% of decision makers are expecting their organisation's investment to increase to prepare for future cybersecurity risks over the coming 12 months



Q5. How do you expect your organisation's investment to prepare for future cybersecurity risks to change over the next 12 months? Select one | Base: 200

Planned Investments in Cybersecurity Technologies

Almost all organisations have plans to invest in technologies over the next 12 months, particularly modern authentication (40%) and cyber insurance (34%)



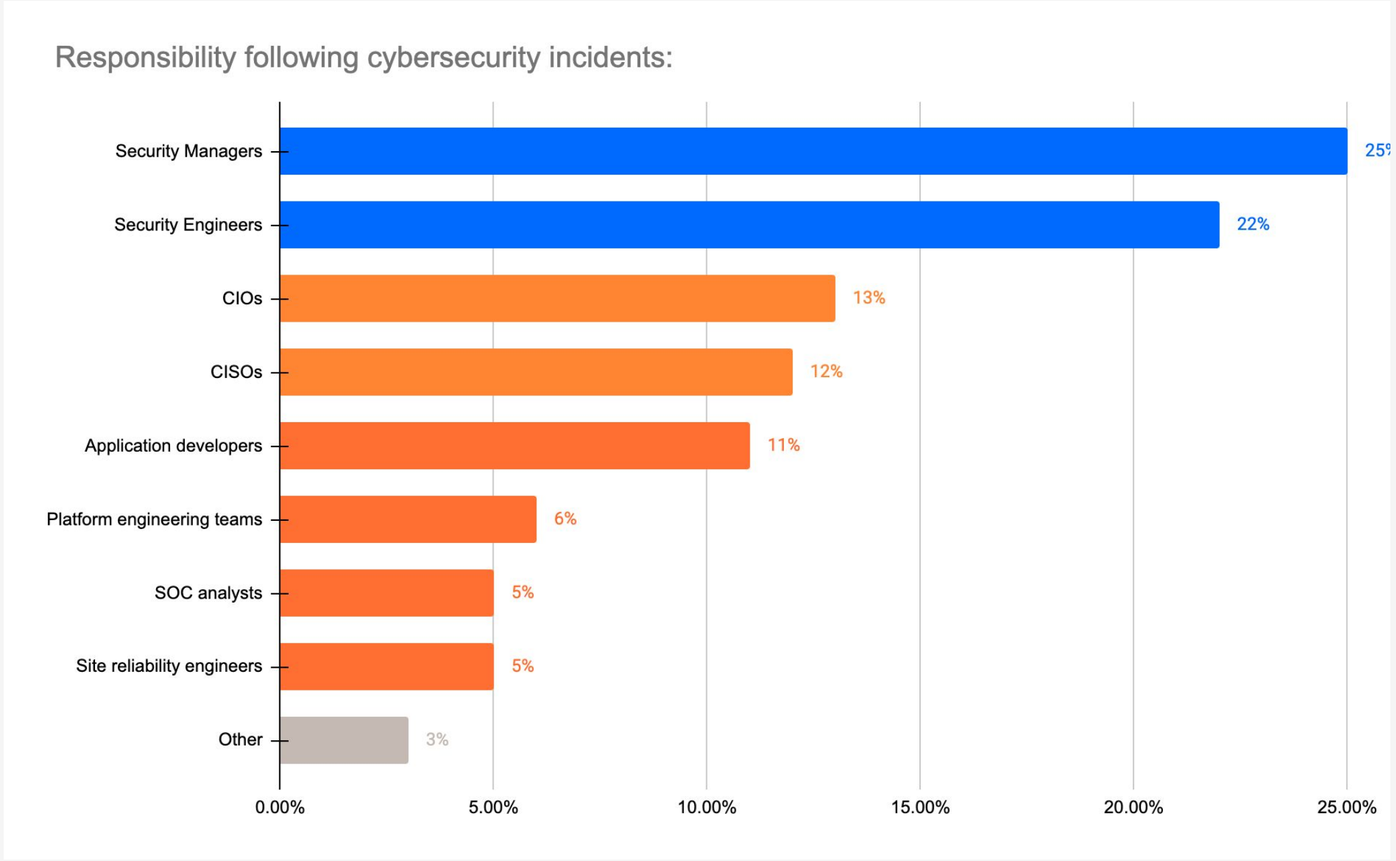
Q4. Which technologies and/or services does your organisation plan to invest in over the next 12 months? Select all that apply | Base: 200

Main Findings

Shifting accountability

Responsibility During Cybersecurity Incidents

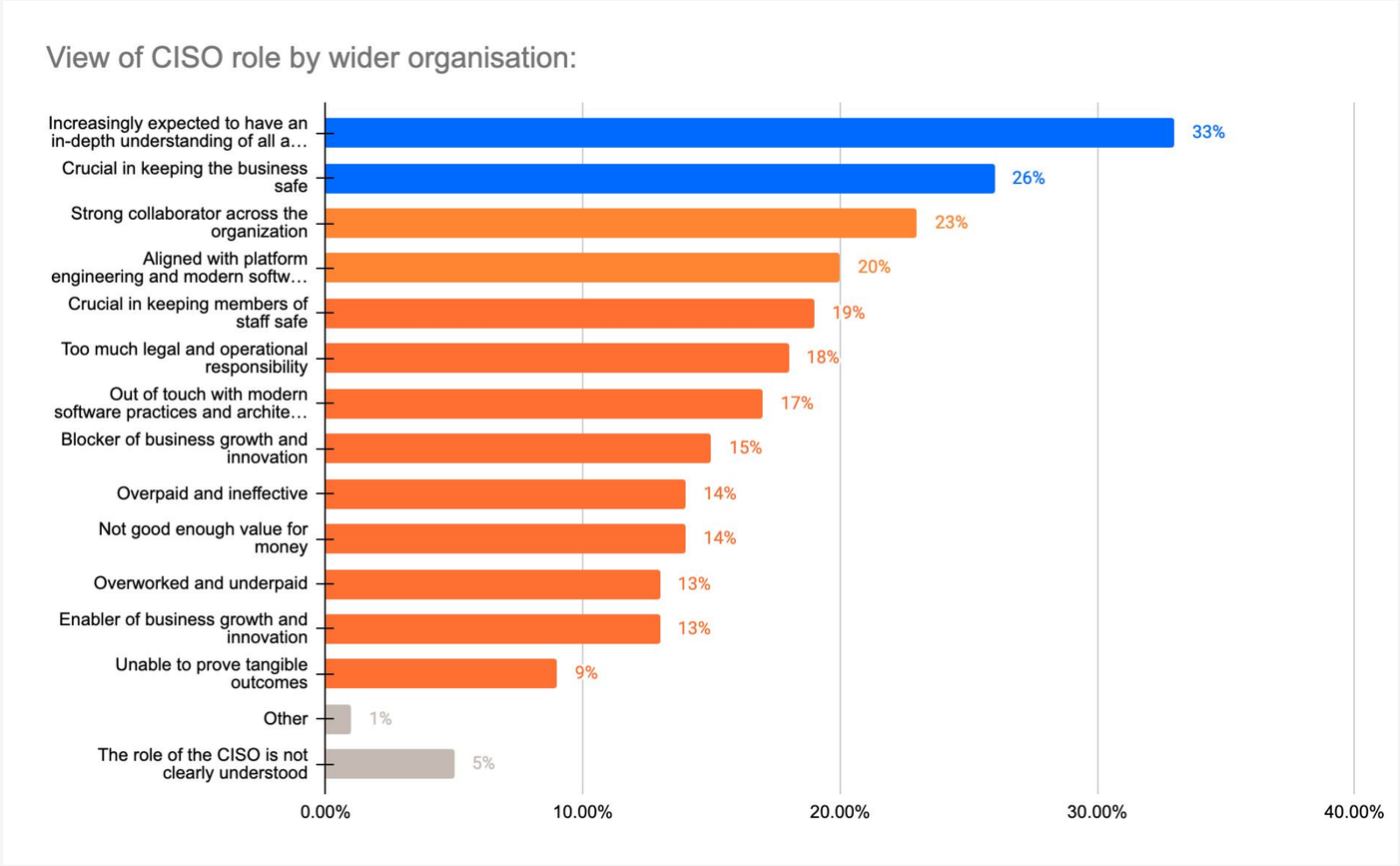
There is a wide spread of responsibility when it comes to security incidents, however, Security Managers (25%) and Engineers (22%) are most often held responsible for cybersecurity incidents



Q9. Who do you feel is most often held responsible for cybersecurity incidents in your organisation? Select one | Base: 200

Perception of CISO Role

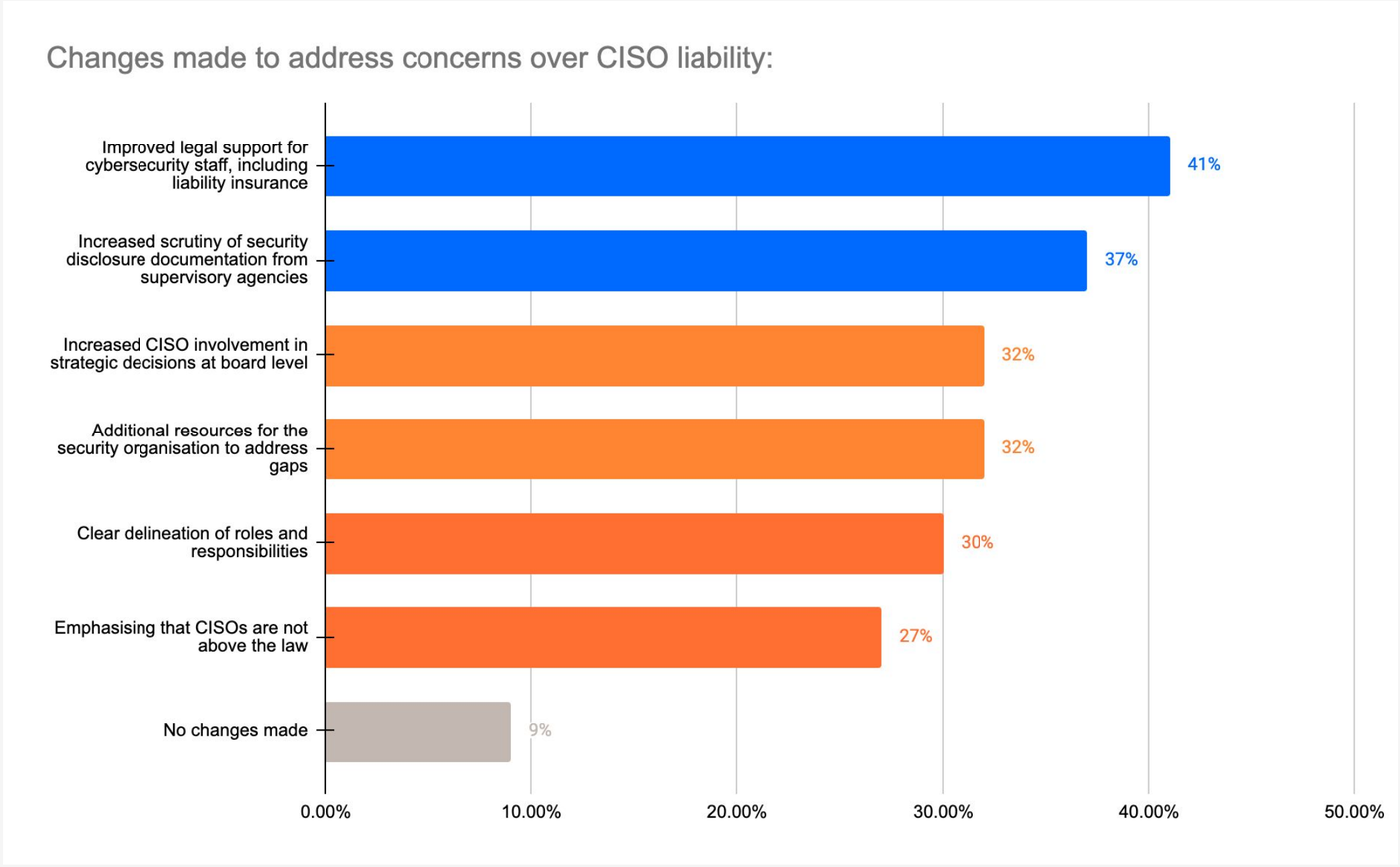
Decision makers feel that the role of CISO is increasingly expected to have an in-depth understanding of all areas of IT (33%) and are viewed as crucial in keeping the business safe (26%)



Q10. How do you think the role of the CISO is viewed by your wider organisation? Select top three | Base: 200

Changes to Address CISO Liability

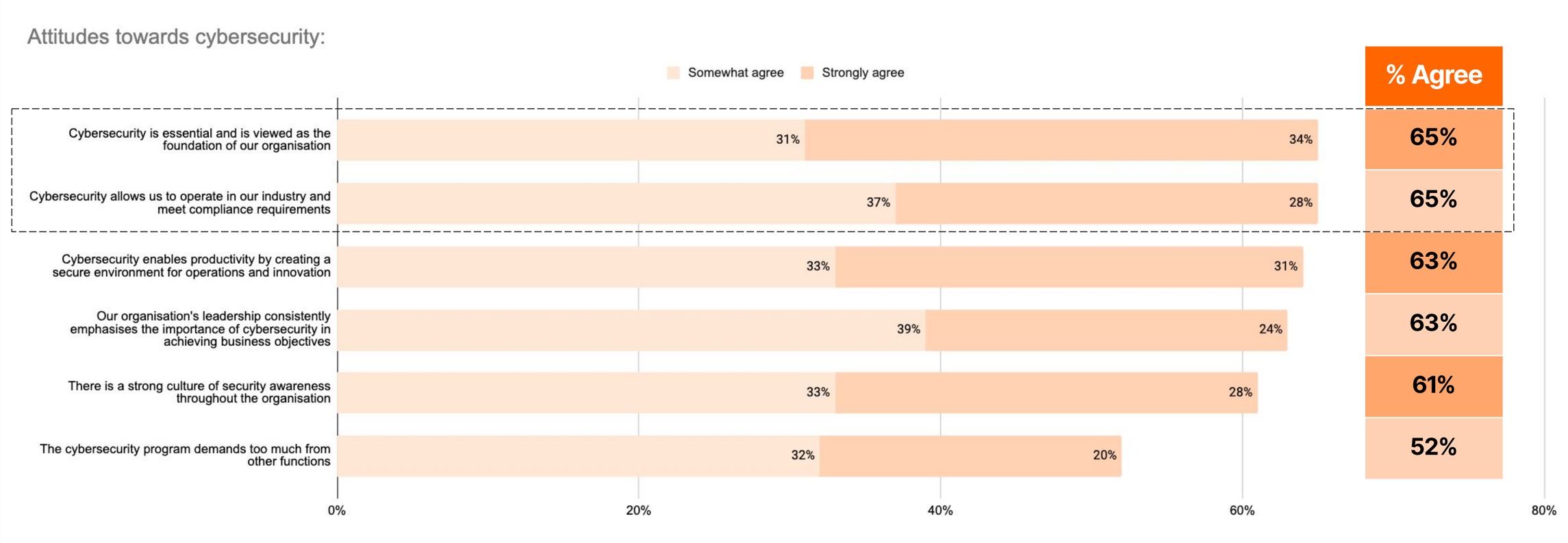
Decision makers feel that the role of CISO is increasingly expected to have an in-depth understanding of all areas of IT (33%) and are viewed as crucial in keeping the business safe (26%)



Q12. What changes has your company made to address concerns regarding CISO liability? Select all that apply | Base: 200

Perception of Value of Cybersecurity

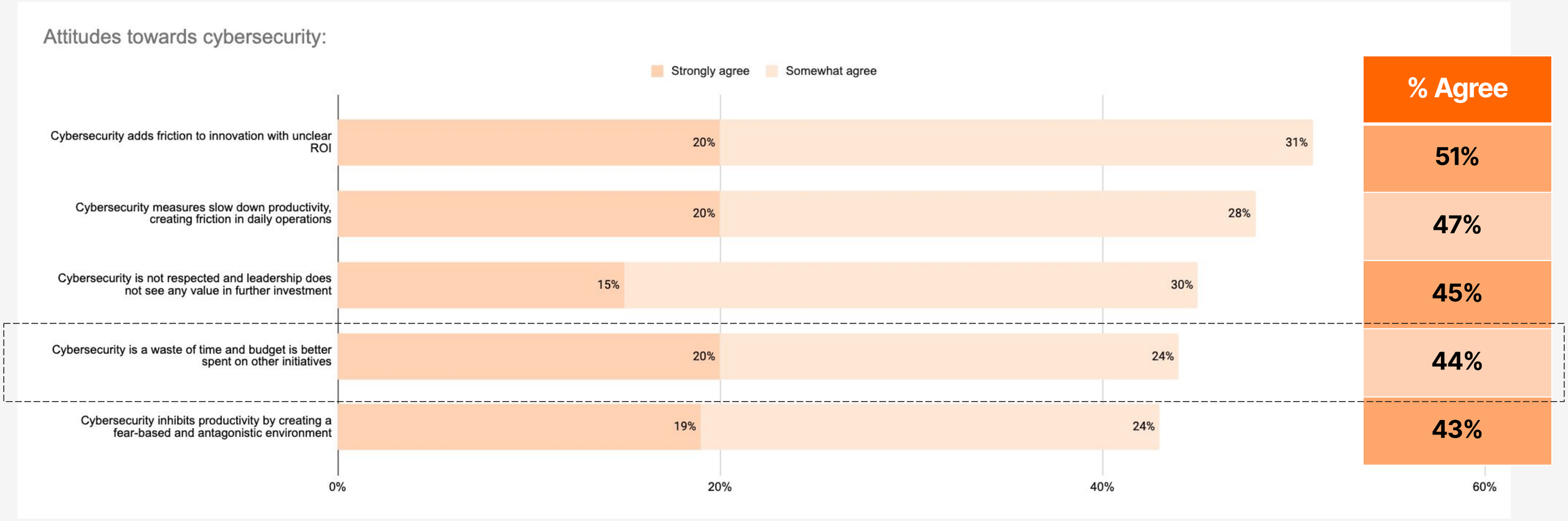
There is a strong consensus on the essential nature of cybersecurity particularly when it comes to meeting compliance requirements (both 65%)...



Q11. Thinking about the perception of the value of cybersecurity in your organisation, to what extent do you agree or disagree with the following statements? | Base: 200

Perception of Value of Cybersecurity

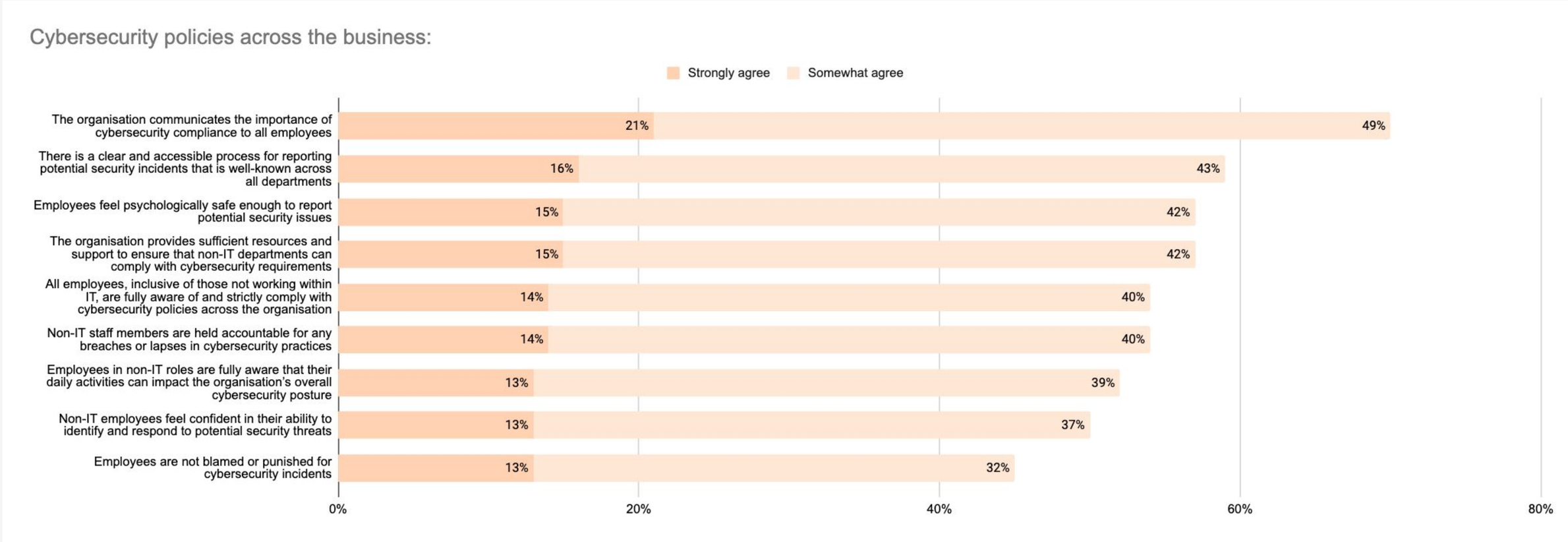
...this is further illustrated by only 44% agreeing that cybersecurity is a waste of time, and that budget would be better spent elsewhere



Q11. Thinking about the perception of the value of cybersecurity in your organisation, to what extent do you agree or disagree with the following statements? | Base: 200

Cybersecurity Policies

59% of businesses have a strong culture of compliance with cybersecurity policies across all departments, facilitated by effective communication of the importance of security (69%)



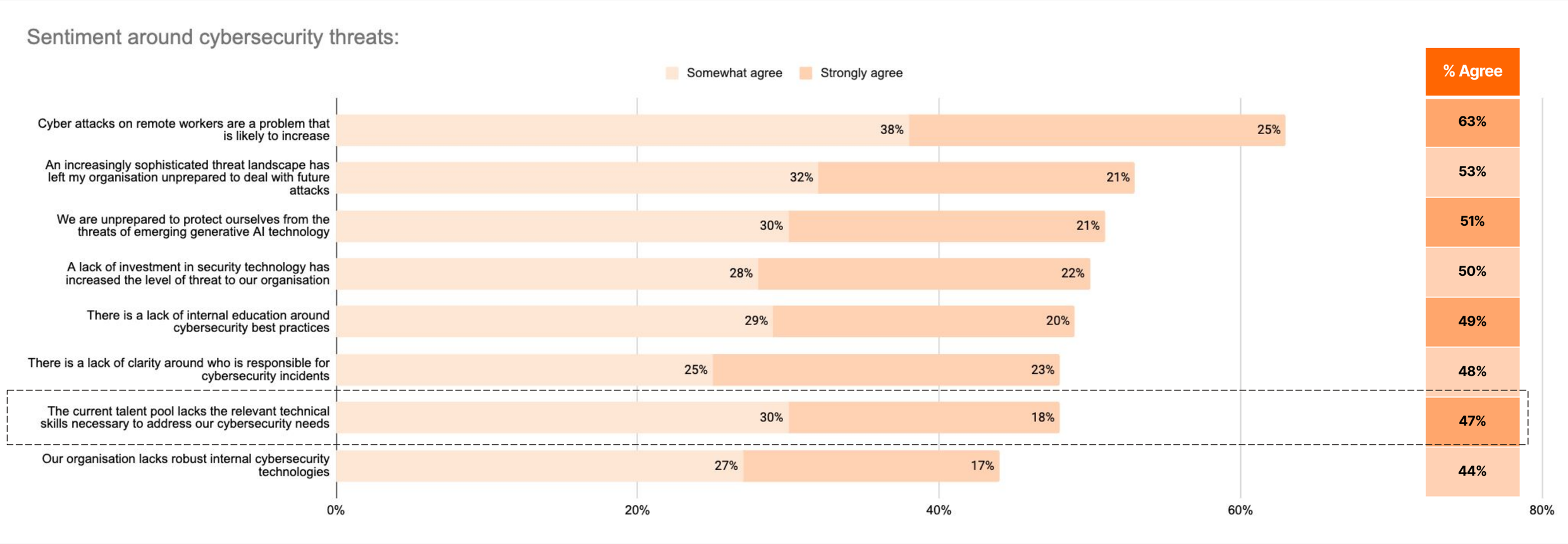
Q13. Thinking about how well cybersecurity policies are followed by all employees, including those in non-IT departments, to what extent do you agree with the following statements? | Base: 200

Main Findings

The cybersecurity talent pool

Cybersecurity Threats

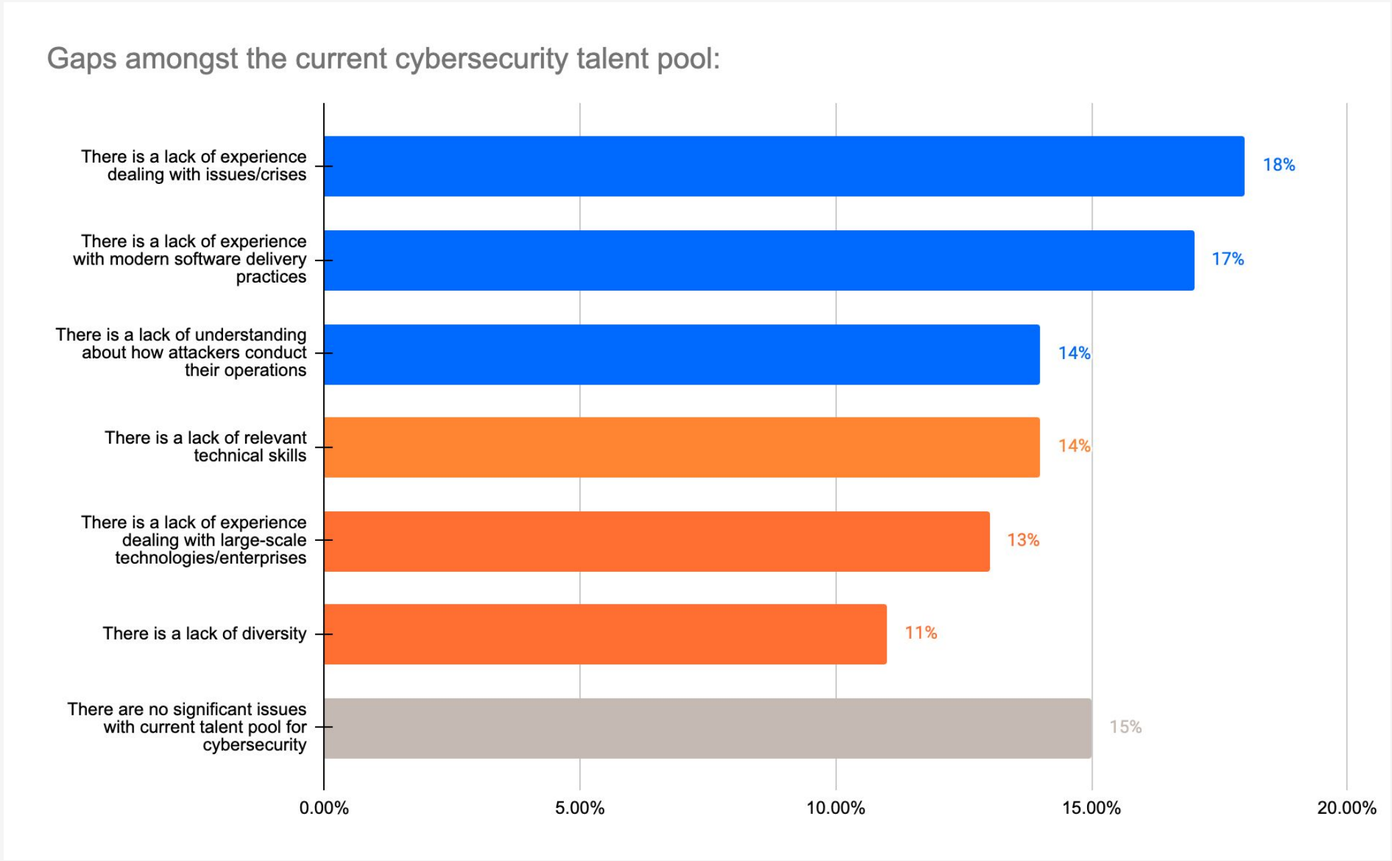
There are rising concerns over cyberattacks on remote workers (63%), an issue businesses may not be prepared for as 47% of cybersecurity decision makers think that the current talent pool lacks the relevant technical skills to address their needs



Q2. Thinking about cybersecurity threats to your organisation, to what extent do you agree with the following statements? | Base: 200

Gaps in Cybersecurity Talent Pool

At an overall level, the gaps in the talent pool are multifaceted with there being no clear driver - however, 86% agree there are issues



Q8. Where do you feel there are gaps amongst the current talent pool when it comes to cybersecurity? Select one | Base: 200

Main Findings

Investment trends in cybersecurity

Annual Spending on Web Application / API Security

On average, businesses spend $823,960 annually on web application and API security controls / tools, with businesses reporting reliance upon an average of 8 cybersecurity solutions

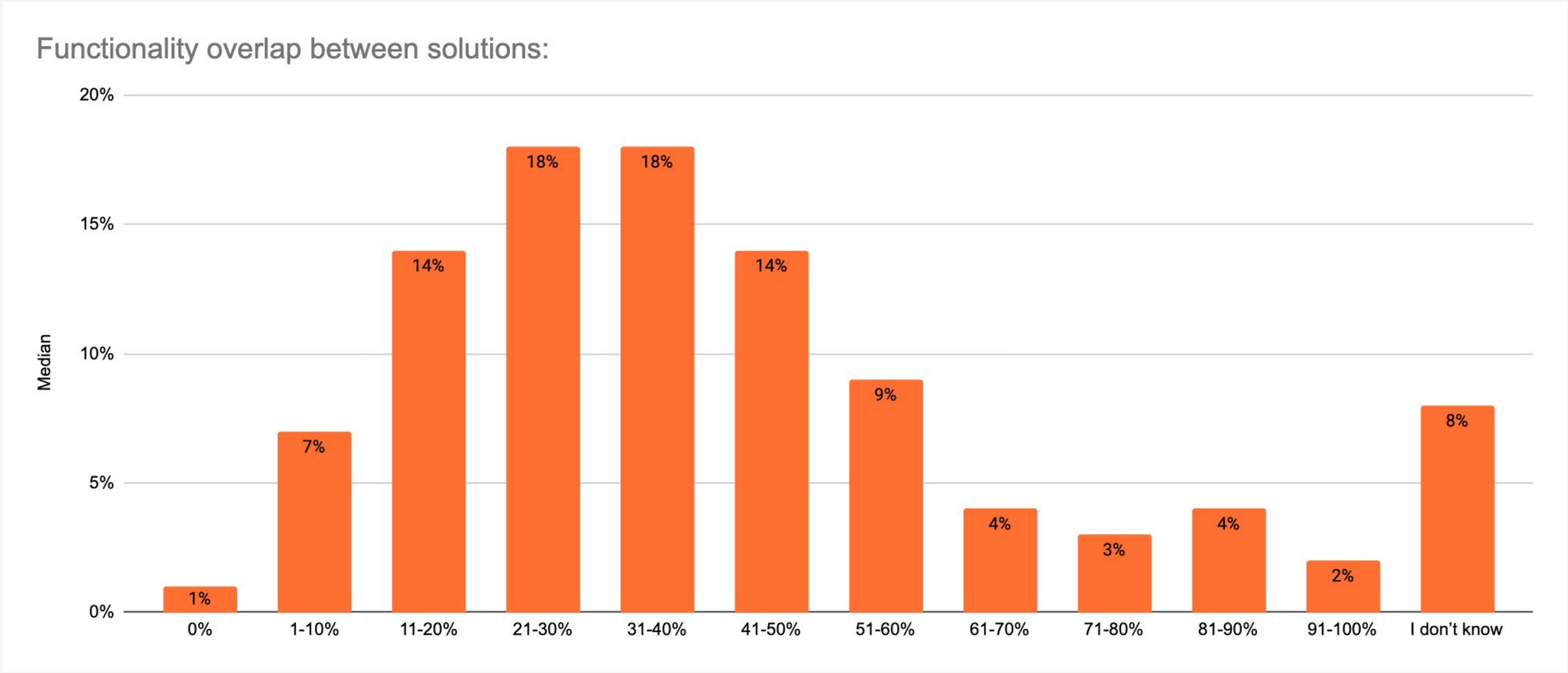
Average amount spent annually on web application and API security controls / tools

Average number of network and application cybersecurity solutions organisations rely on

Q7a. In USD ($), approximately how much would you estimate your organisation spends per year on web application and API security controls/tools? | Base: 200

Overlap in Cybersecurity Solutions

On average, 38% of these cybersecurity solutions overlap in their primary function



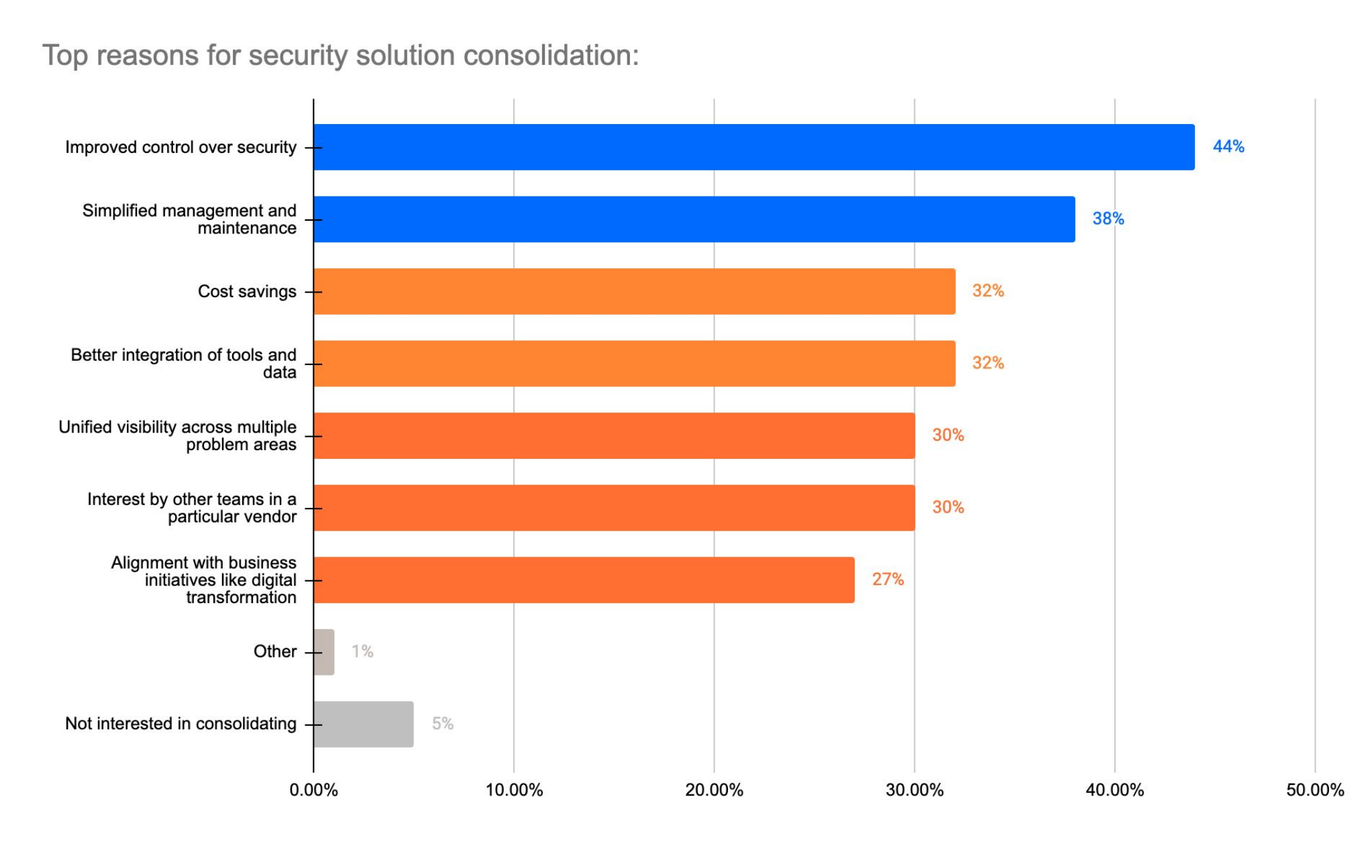
Q7c. Roughly, how many of these solutions overlap in their primary function? Select one | Base: 200

Main Findings

Consolidation and Integration of Security Solutions

Reasons for Security Solution Consolidation

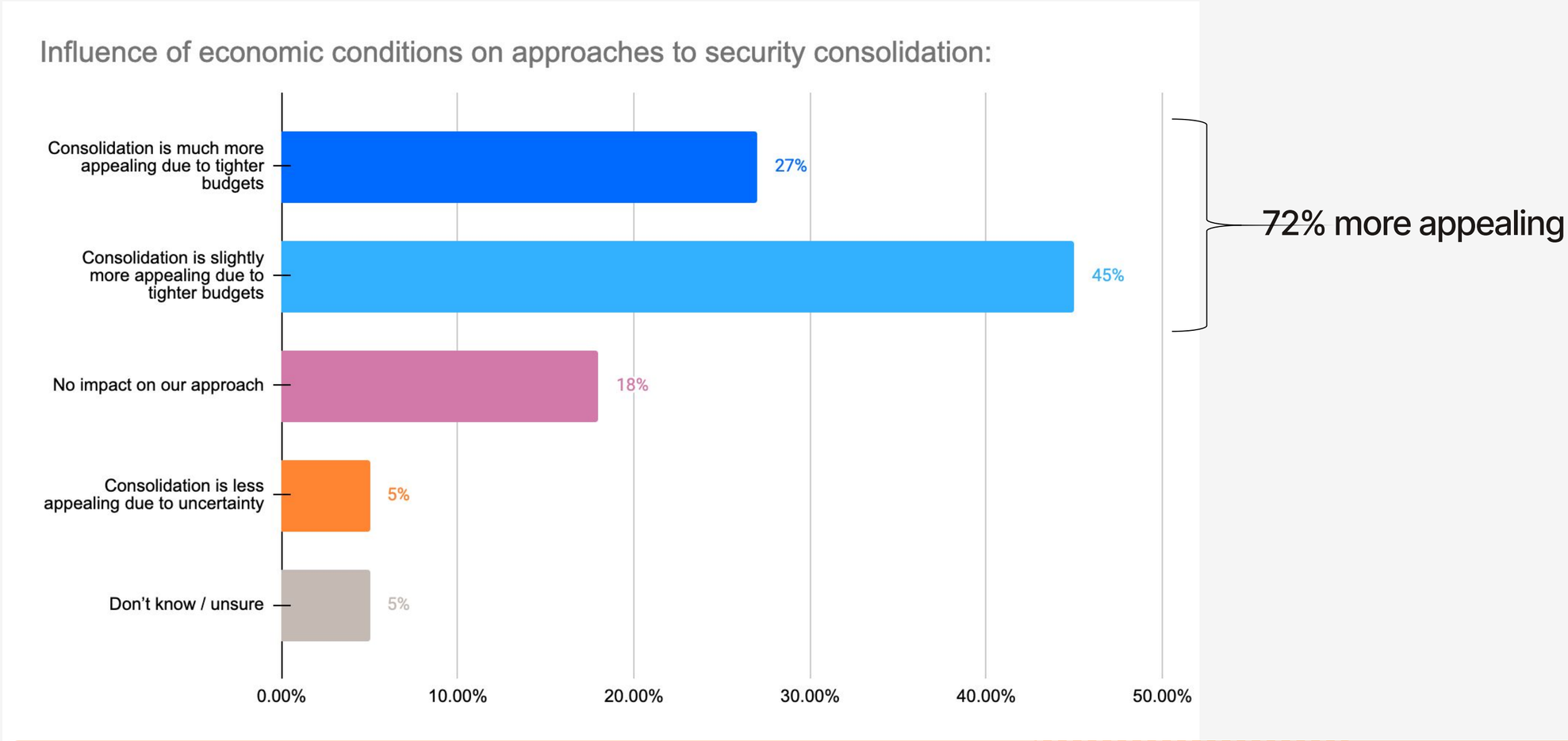
44% attribute their organisation's interest in consolidating security solutions to improving control over security, whilst a further 38% are simplifying management and maintenance



Q23a. If you are interested in consolidating security solutions, what are the primary reasons for your organisation's interest in doing so? Select all that apply | Base: 200

Economic Influence on Security Consolidation

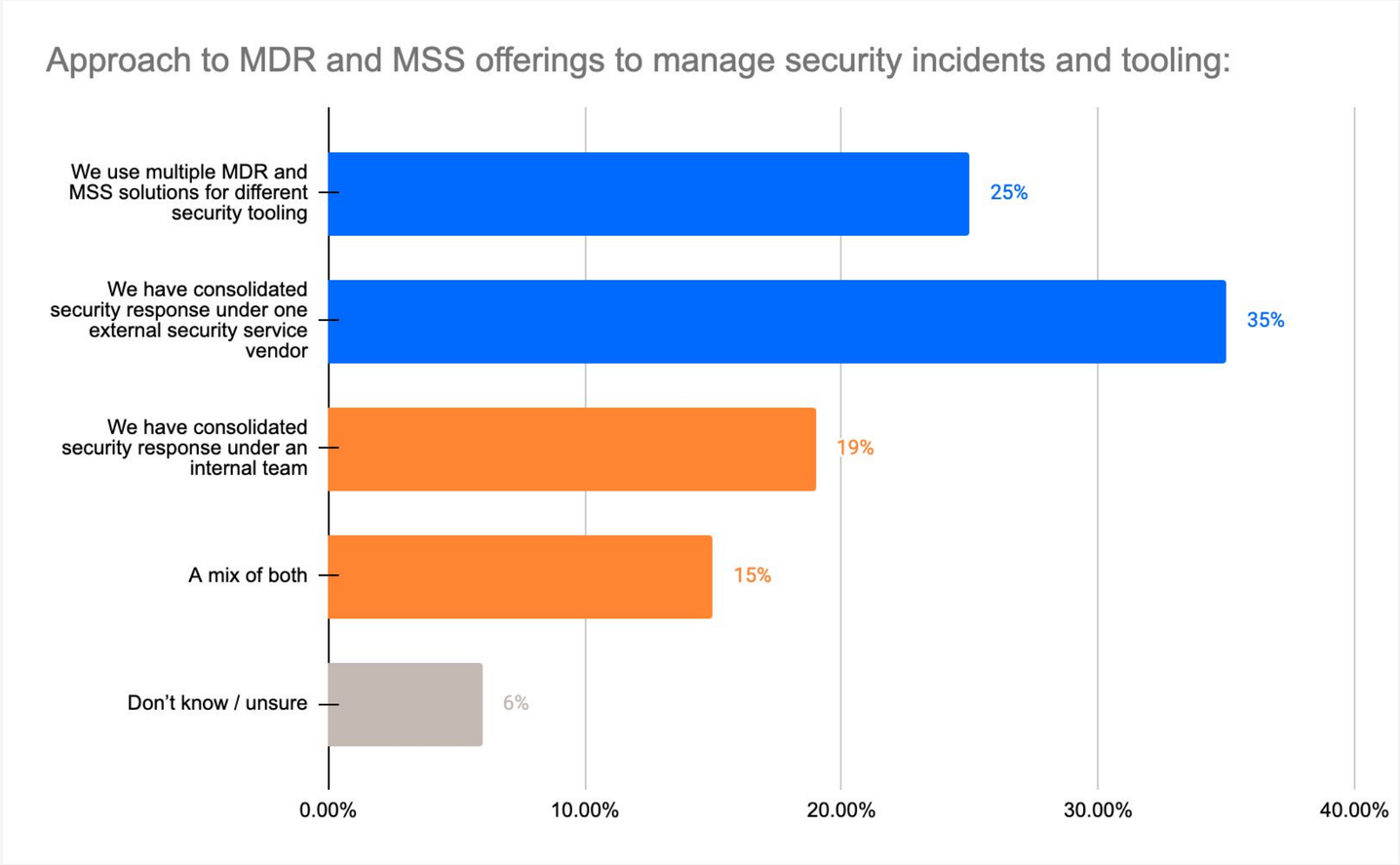
72% say that consolidation is more appealing due to tighter budgets



Q23b. How have economic conditions influenced your organisation's approach to security consolidation? Select one| Base: 187

Approach to MDR and MSS Offerings to Manage Security Incidents

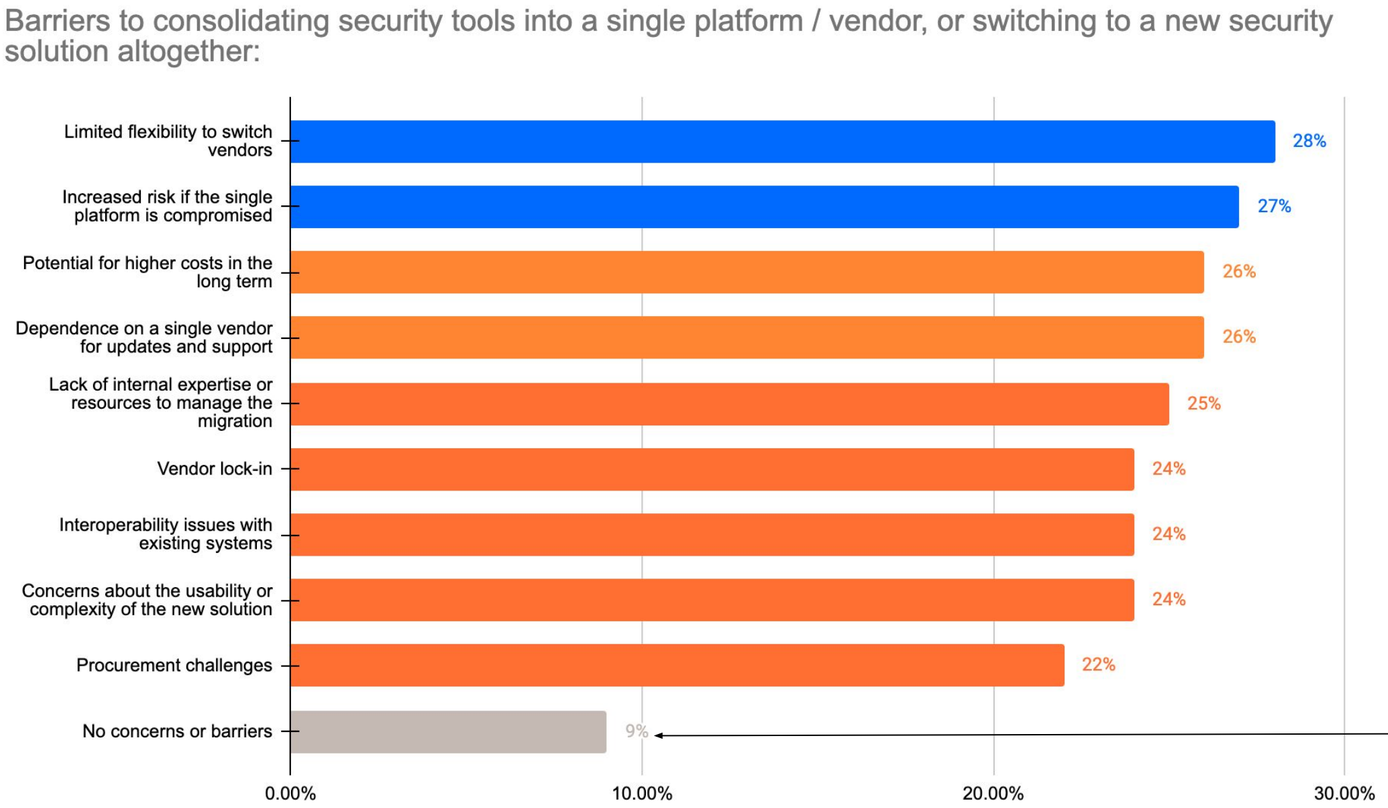
35% have consolidated their security response under one external security service vendor, whilst 25% are using multiple MDR and MSS solutions for different security tooling



Q24a. What is your organisation's approach to Managed Detection & Response (MDR) and Managed Security Service (MSS) offerings to manage security incidents and security tooling? Select one | Base: 200

Concerns with Security Tool Consolidation

28% are concerned about limited flexibility to switch vendors, with 27% being concerned about the increased risk if the single platform is compromised when it comes to consolidating security tools

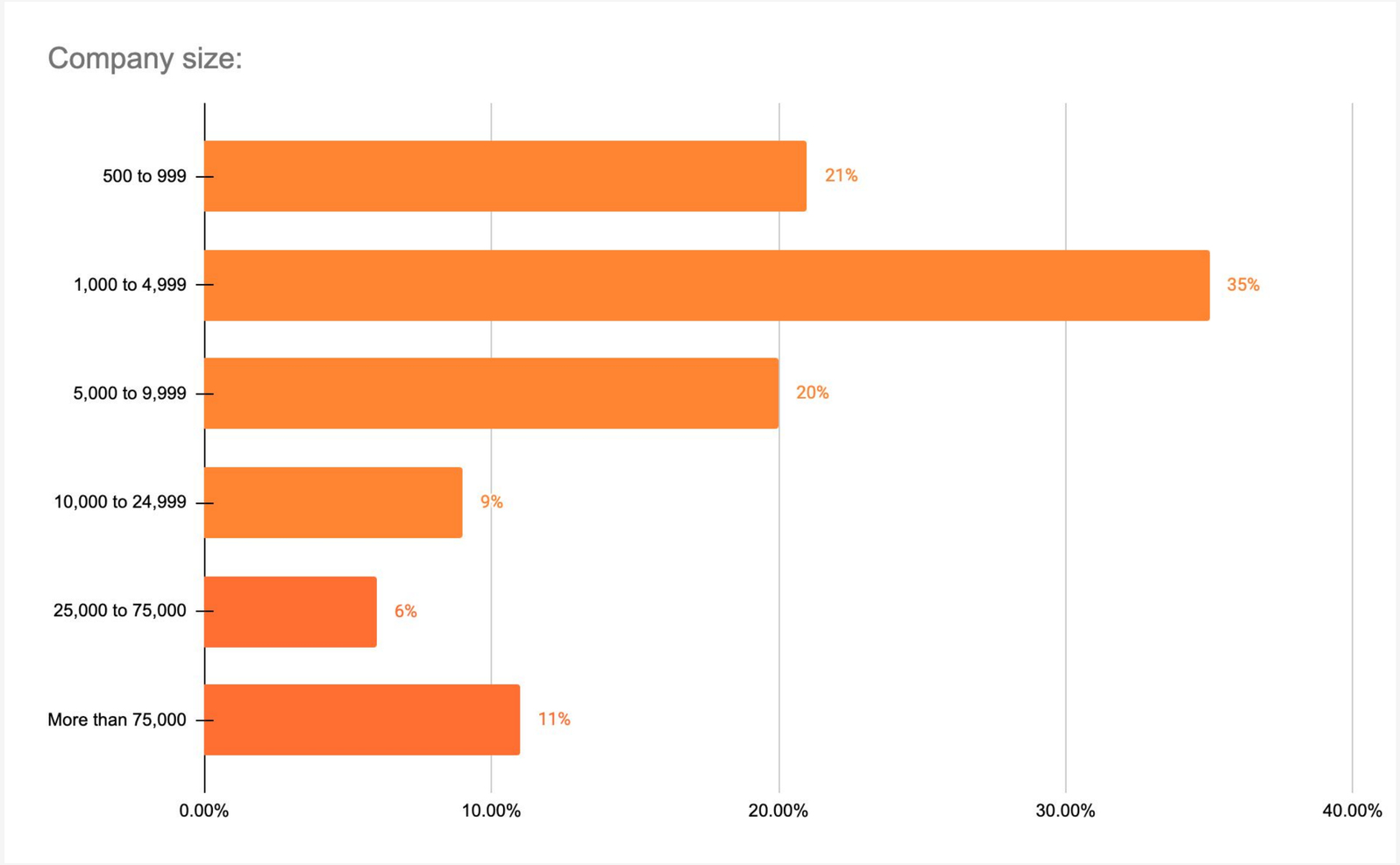


92% of businesses have concerns or are facing barriers when it comes to security tool consolidation

Q24b. What are the concerns or barriers to consolidating your security tools onto a single platform/vendor, or switching to a new security solution? Select all that apply | Base: 200

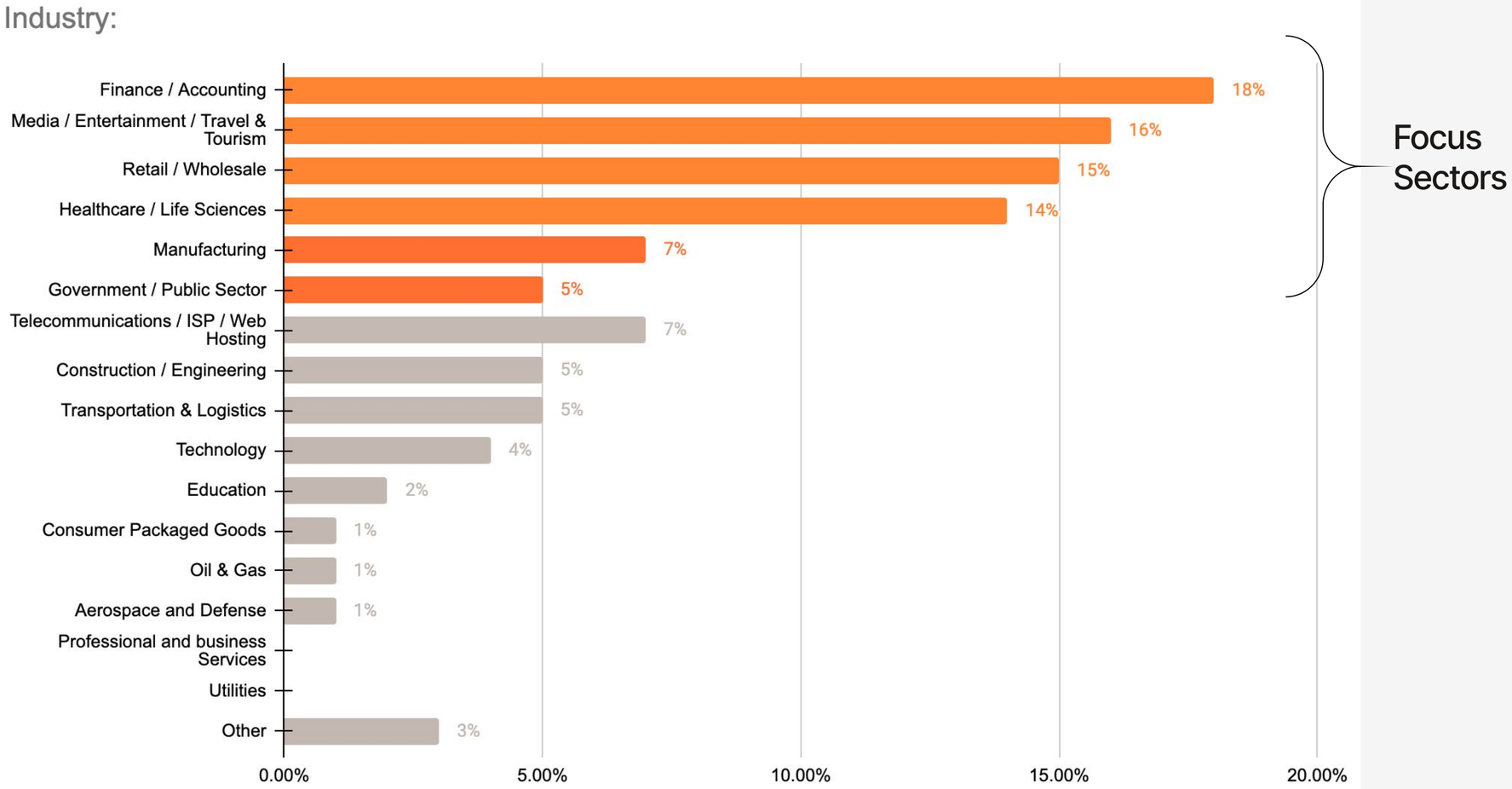
Demographics

Company size



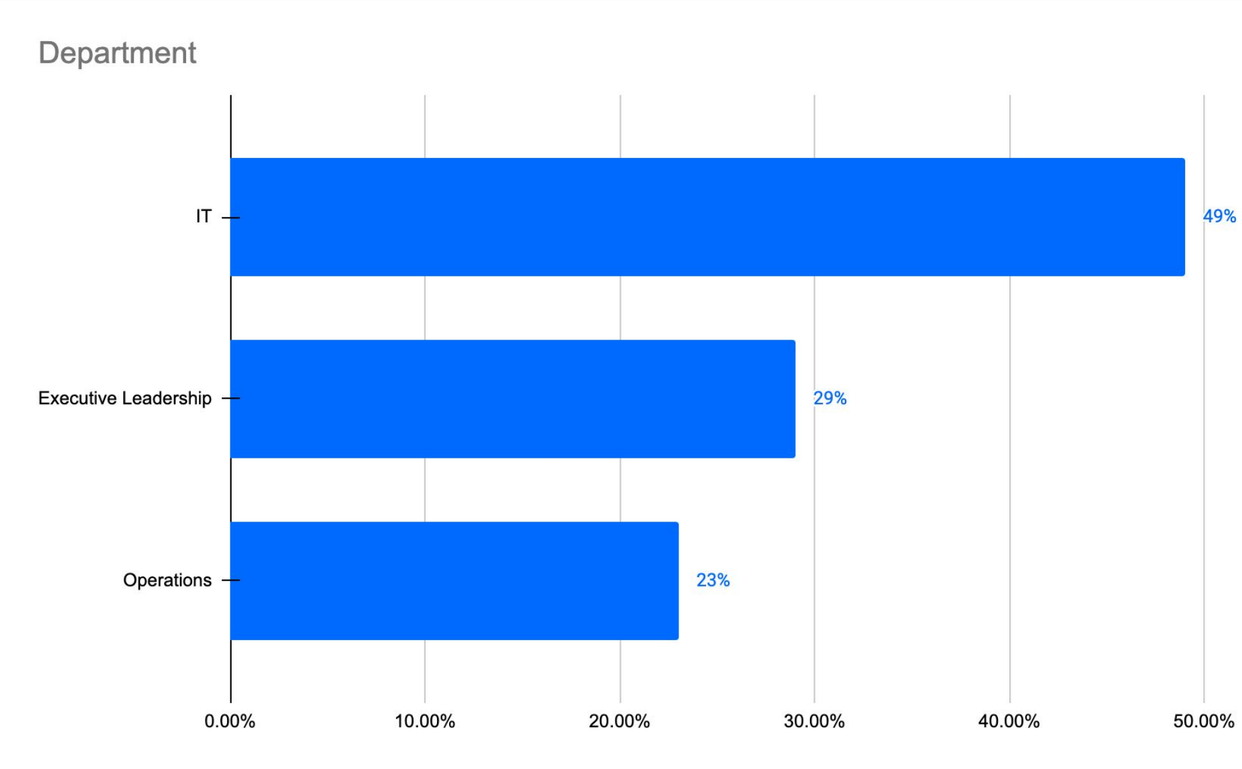
S2. How many people does your company employ? Select one

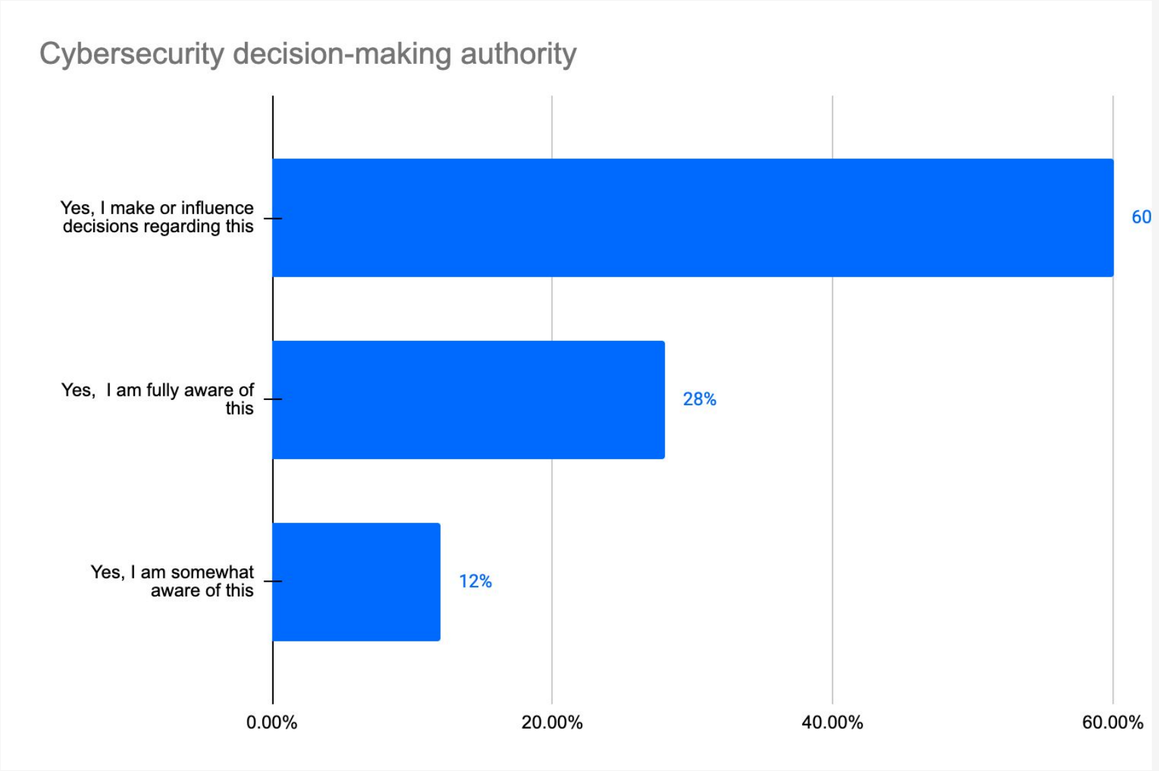
Industry



S3. Which of the following most closely describes the industry your organization is in? Select one | Base: 200

Department and Authority





S4. Which of the following best describes the department you sit within? Select one
S5. Within your current job role, are you aware of or do you make or influence decisions regarding cybersecurity within your organisation? Select one | Base: 200

Thank you!