Approaches to Customer Identity Security

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Summary Results | October 2020

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SURVEY SUMMARY

Between April and October 2020, Gatepoint Research invited selected executives to participate in a survey themed *Approaches to Customer Identity Security.*

▶ **Candidates were invited via email and 377 executives have participated to date.**

▶ **Management levels represented are all senior decision makers: 9% hold the title CxO or VP, 35% are Directors, 40% are Managers, and 16% are practitioners, such as engineers, architects, and developers.**

▶ **Survey participants represent firms from a wide variety of industries including business services, construction, consumer services, education, financial services, healthcare, media, manufacturing (general, primary and high tech), public administration, retail trade, telecom transportation, utilities, and wholesale trade.**

▶ **Responders work for firms with a wide range of revenue levels:**
- **32% work in Fortune 1000 companies with revenues over $1.5 billion;**
- **14 work in large firms whose revenues are between $500 million and $1.5 billion;**
- **10% work in mid-market firms with $250 million to $500 million in revenues;**
- **44% work in small companies with less than $250 million in revenues.**

▶ **100% of responders participated voluntarily; none were engaged using telemarketing.**
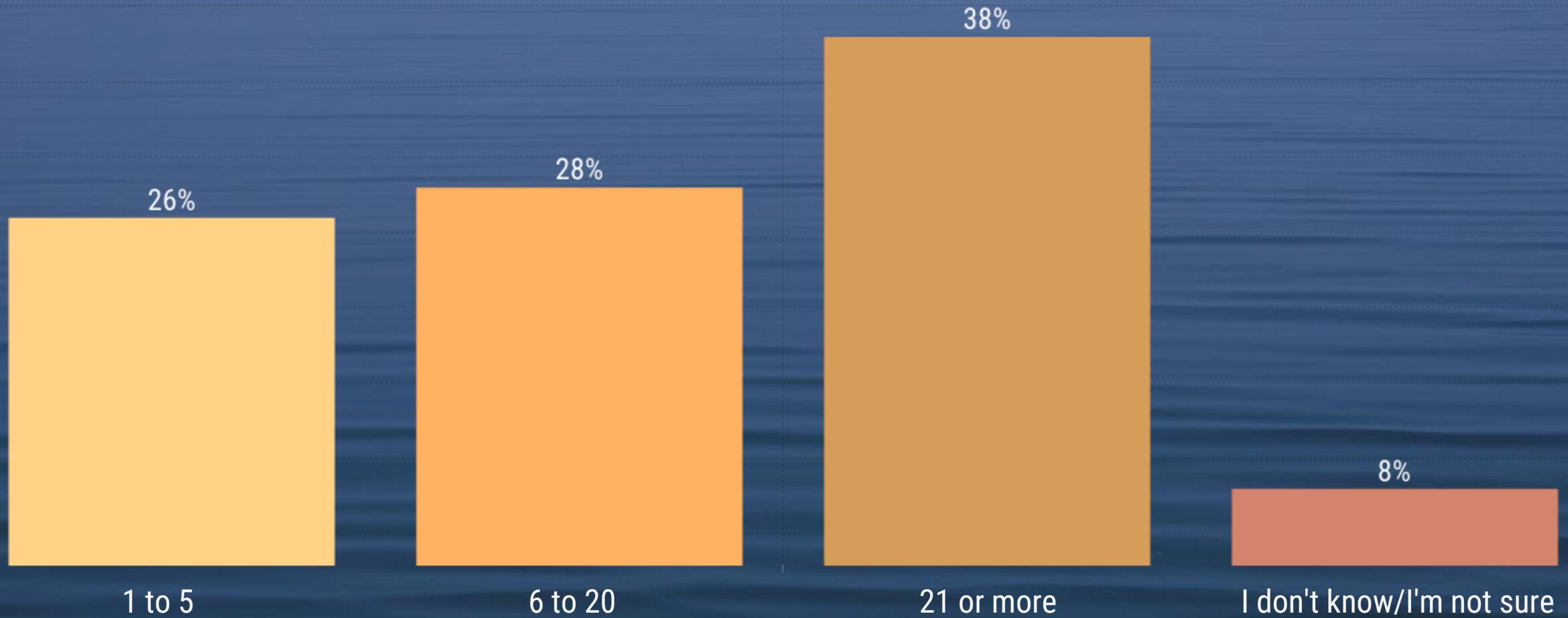
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EXECUTIVE OVERVIEW

Business leaders recognize the need to innovate at breakneck speed, automating every possible step of the DevOps process. The challenge in revolutionizing DevOps is mitigating risk throughout the rapid, iterative process. What are companies doing to secure developing apps, services, and products?

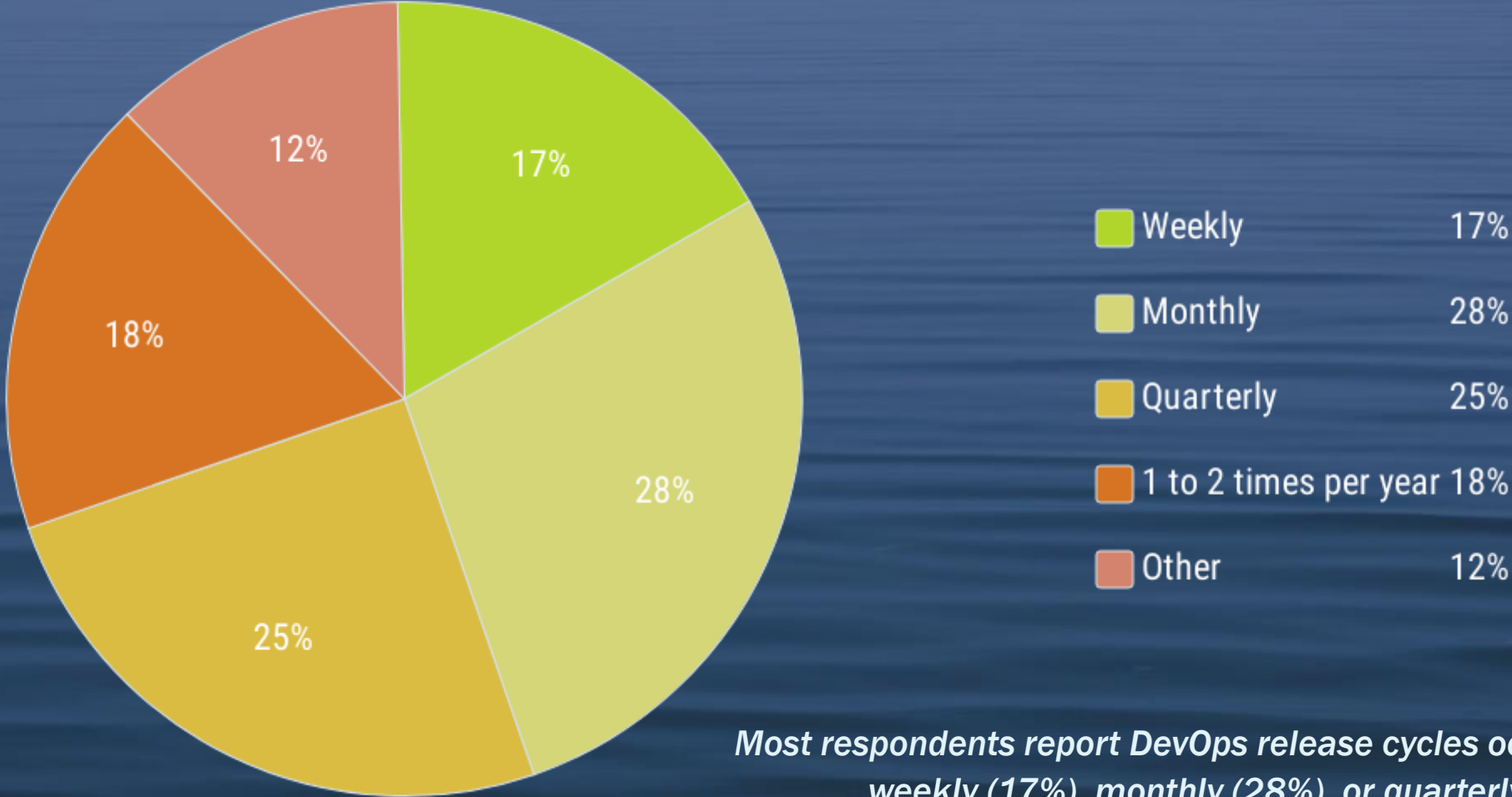This survey asks respondents to report:

- What is the frequency of their DevOps release cycle? Is the cycle ever delayed by security components?

- Are they confident in their identity access process? Do they lose sleep worrying about account takeovers?

- What capabilities of an identity solution would drive efficiency and stability into the DevOps process?

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How many applications do you have?

26%	28%	38%	8%
1 to 5	6 to 20	21 or more	I don't know/I'm not sure

More than half (54%) of those surveyed have up to 20 apps; 38% are managing more.

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What is your typical DevOps release cycle?

Weekly — 17%
Monthly — 28%
Quarterly — 25%
1 to 2 times per year — 18%
Other — 12%

*Most respondents report DevOps release cycles occurring weekly (17%), monthly (28%), or quarterly (25%).*

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How often are development timelines affected by custom-built identity, account management, or security components?

(Rate 1 to 5: 1 = Frequently 5 = Rarely)

All but 20% of respondents say their timelines are delayed by identity, account management, or security components., including 25% who say the delays occur frequently.
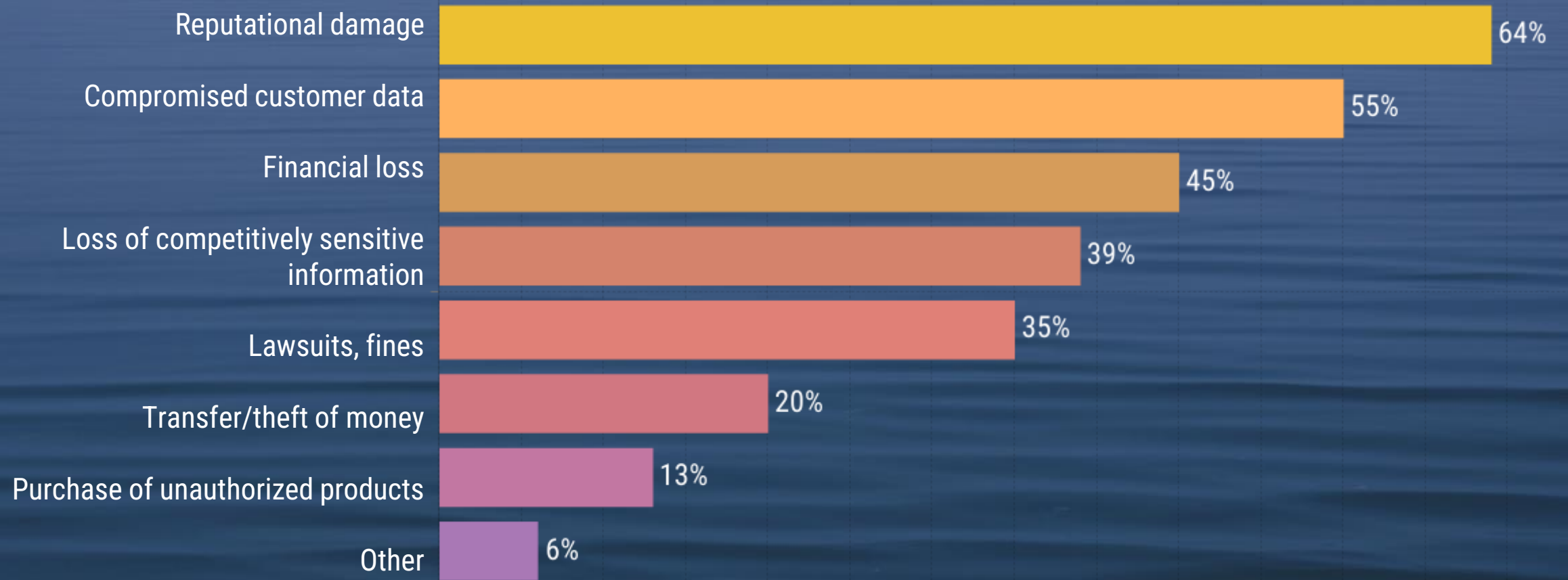
10%
15%
32%
23%
20%

1
2
3
4
5

Frequently
Rarely

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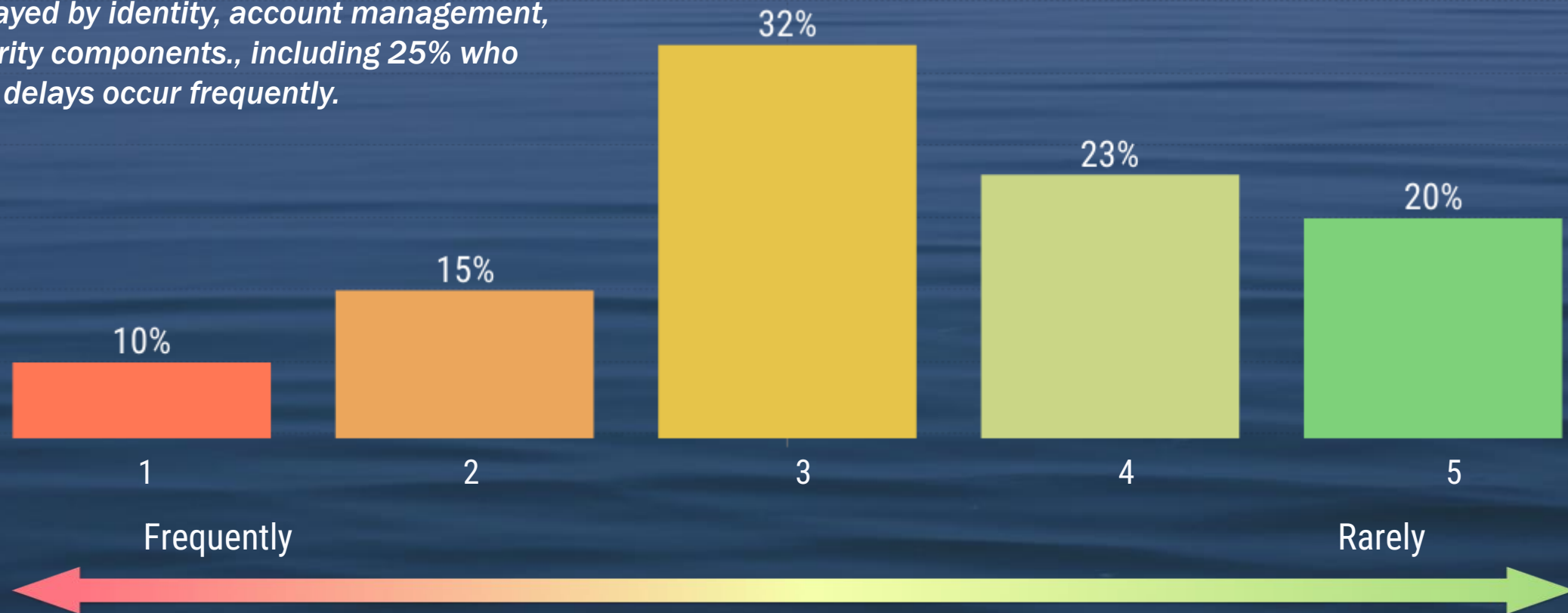
How confident are you that your identity access process is protected against account takeovers?

(Rate 1 to 5: 1 = It keeps me up at night, 5 = Very confident)

Worried about protection against account takeovers, 34% of respondents are not sleeping as well at night as the rest of those surveyed.
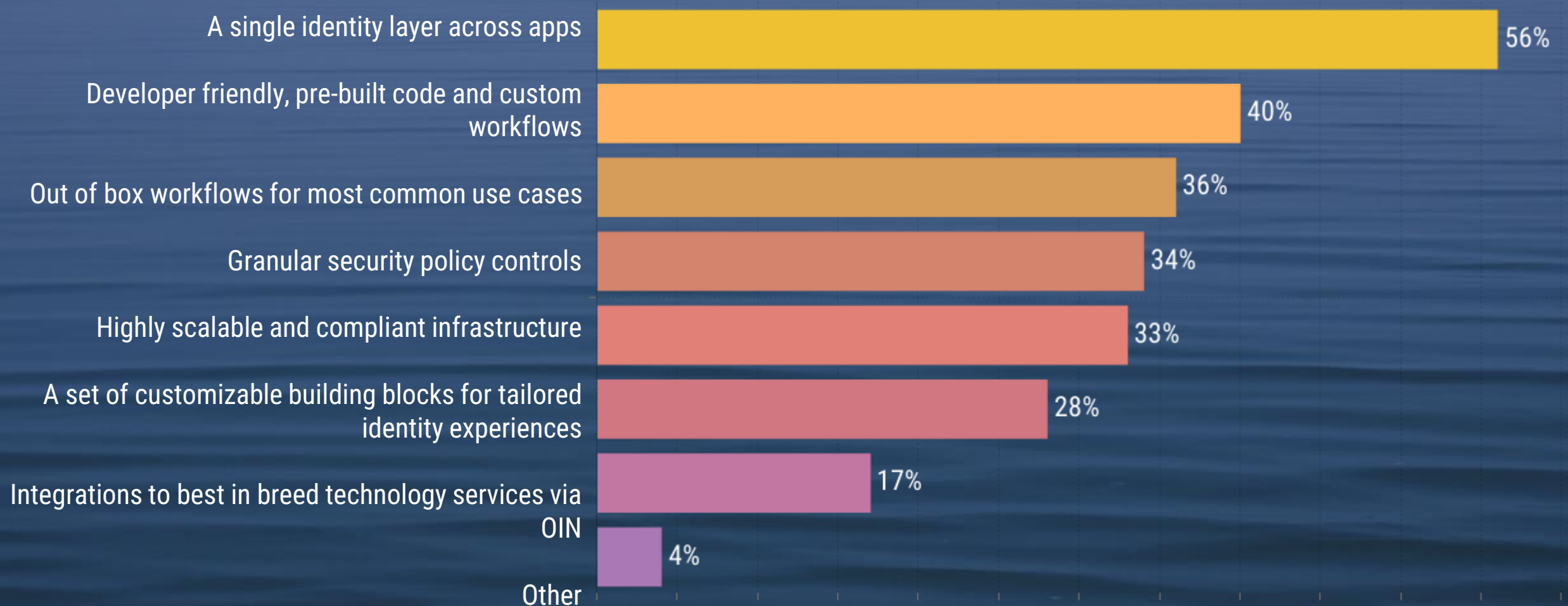

2%   6%   26%   36%   30%

1   2   3   4   5

It keeps me up at night

Very Confident

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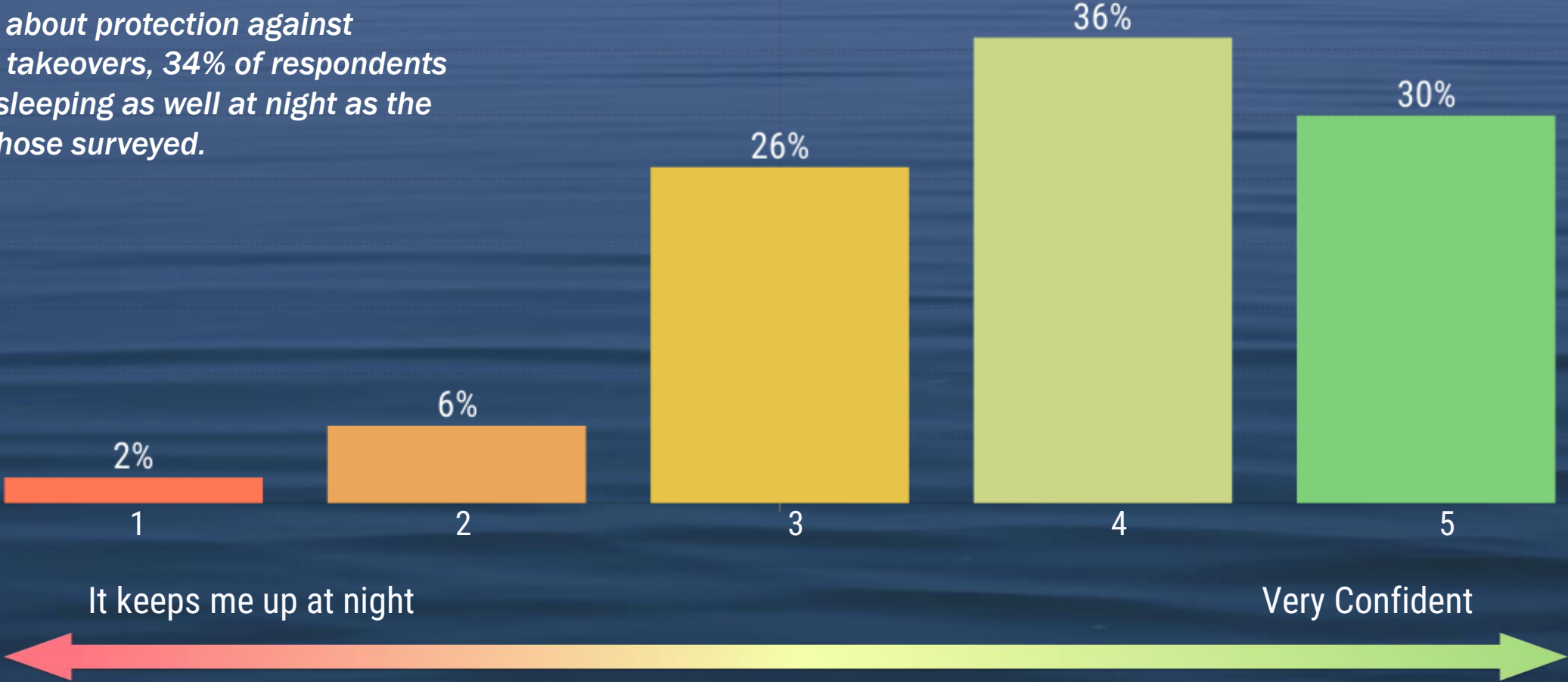
If one or more users had their account compromised, which risks/consequences would most concern you?

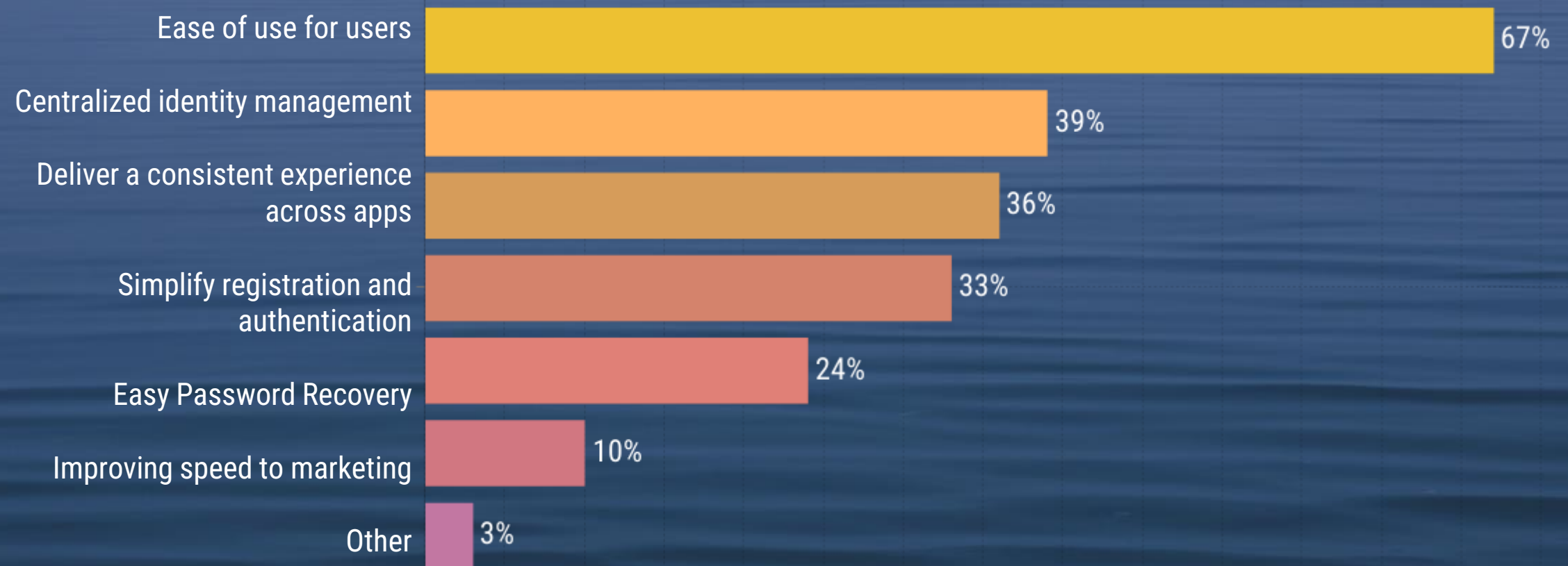| Concern	Percentage
Reputational damage	64%
Compromised customer data	55%
Financial loss	45%
Loss of competitively sensitive information	39%
Lawsuits, fines	35%
Transfer/theft of money	20%
Purchase of unauthorized products	13%
Other	6%

The number one concern about users having their account compromised is brand reputation damage, say 64% of responders, and 55% would worry about customer data being exposed. Least common of all concerns (at 13%) is unauthorized product purchases.

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What capabilities of an identity solution would make building out products and services more efficient for DevOps?

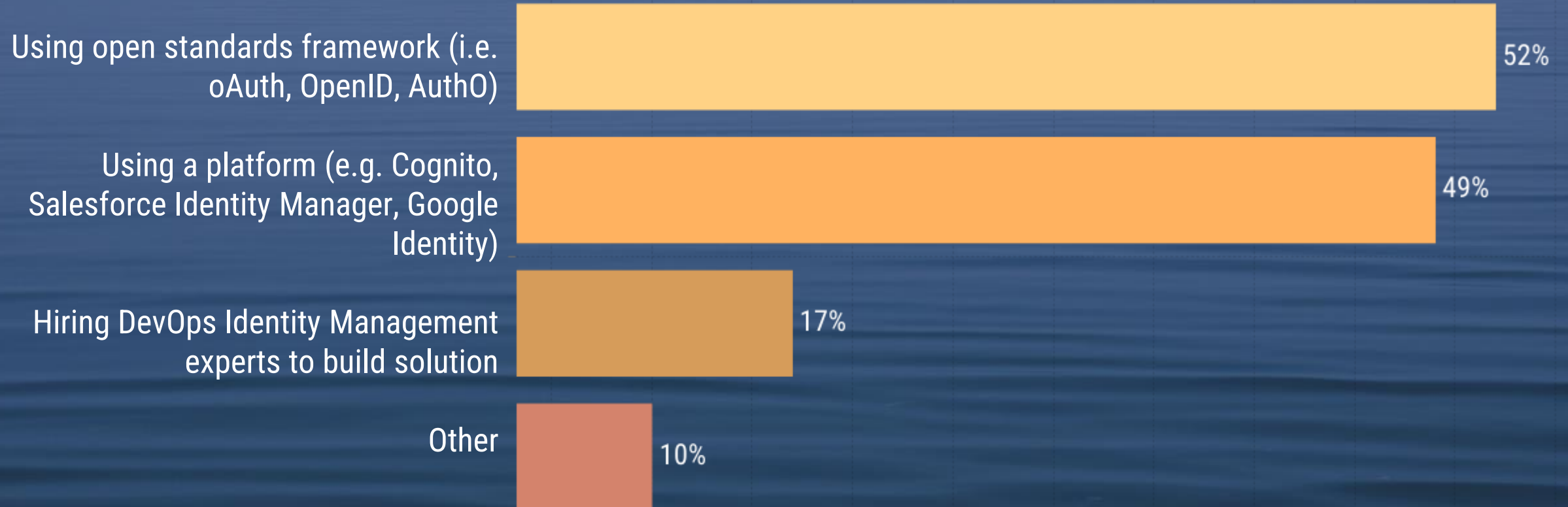| Capability	
A single identity layer across apps	56%
Developer friendly, pre-built code and custom workflows	40%
Out of box workflows for most common use cases	36%
Granular security policy controls	34%
Highly scalable and compliant infrastructure	33%
A set of customizable building blocks for tailored identity experiences	28%
Integrations to best in breed technology services via OIN	17%
Other	4%

Of a long list of desired identity solution capabilities, more than half of respondents say a single identity layer across their apps would make product and service build-outs more efficient for DevOps.

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When developing a login experience for your customer website/mobile apps, what do you consider to be the most important features?

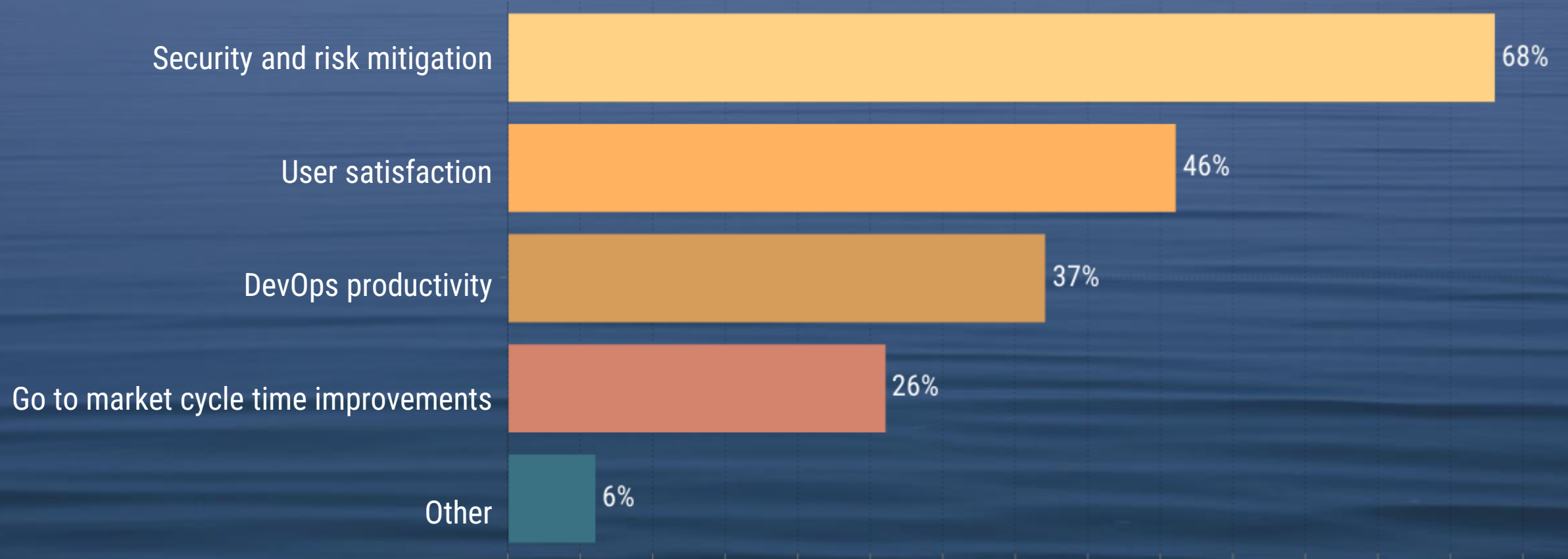| Feature	Percentage
Ease of use for users	67%
Centralized identity management	39%
Deliver a consistent experience across apps	36%
Simplify registration and authentication	33%
Easy Password Recovery	24%
Improving speed to marketing	10%
Other	3%

Far and away the most important feature of a login experience for customers is ease of use, cited by 67% of responders.

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Have you considered any of the following investments as you build out your identity strategy?

Using open standards framework (i.e. oAuth, OpenID, AuthO) — 52%

Using a platform (e.g. Cognito, Salesforce Identity Manager, Google Identity) — 49%

Hiring DevOps Identity Management experts to build solution — 17%

Other — 10%

Investing in open standards framework, such as oAuth, is under consideration for investment by 52% of respondents as they build out an identity strategy, and nearly as many are considering using a platform like Cognito.
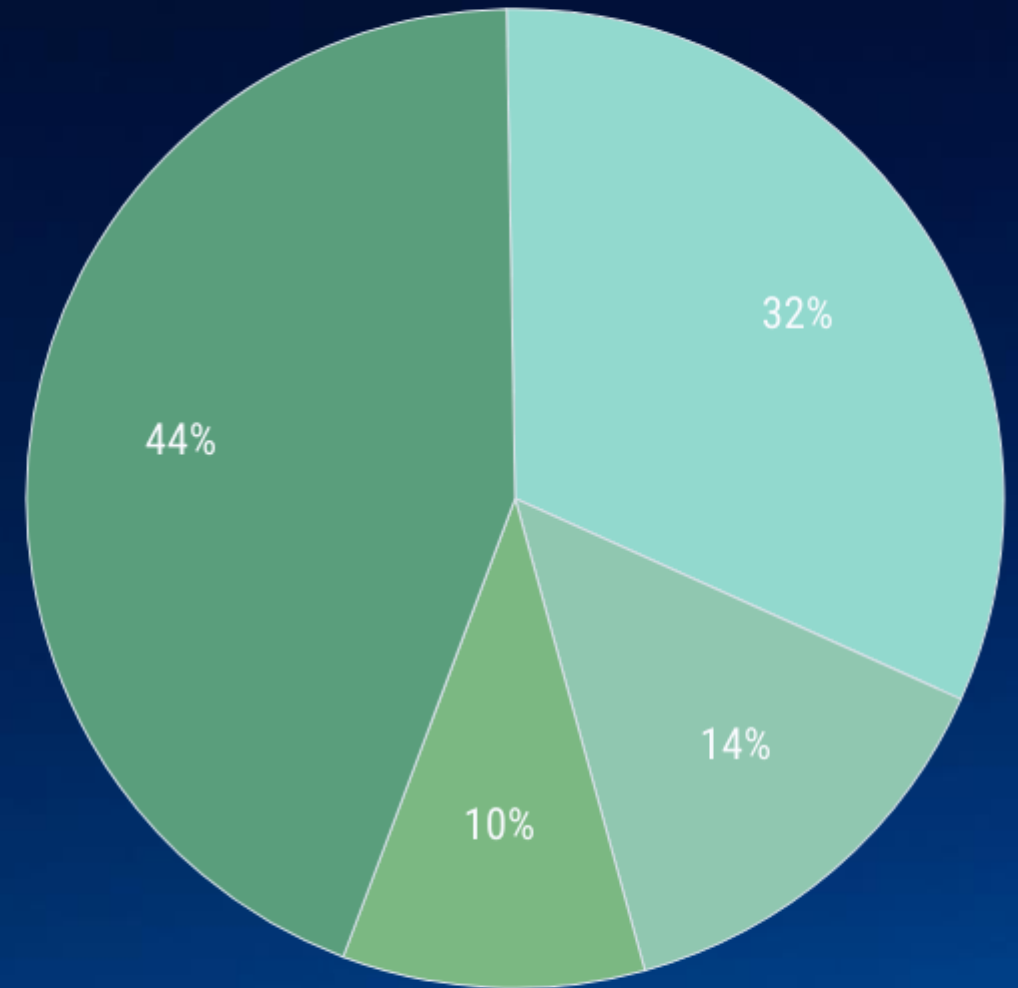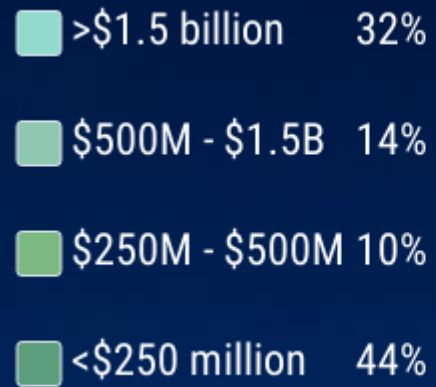
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What arguments tend to influence DevOps budget decisions?

- Security and risk mitigation — 68%
- User satisfaction — 46%
- DevOps productivity — 37%
- Go to market cycle time improvements — 26%
- Other — 6%

Mitigating risk is a primary influencer in discussions about their DevOps budget, say 68% of respondents. Slightly less than half cite user satisfaction as another positive argument for DevOps budget.

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REVENUE

32% of those surveyed work in Fortune 1000 companies with revenues over $1.5 billion.

- >$1.5 billion   32%
- $500M - $1.5B   14%
- $250M - $500M 10%
- <$250 million   44%

32%

14%

10%

44%

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INDUSTRY SECTORS

Responders represent a wide variety of industries.

Industry	%
Business Services	25%
Healthcare	13%
Financial Services	10%
Mfg - General	10%
Mfg - High Tech	9%
Wholesale Trade	9%
Retail Trade	6%
Consumer Services	4%
Mfg - Primary	3%
Transportation	3%
Other: Construction, Media, Education, Public Admin, Telecom, Utilities	9%

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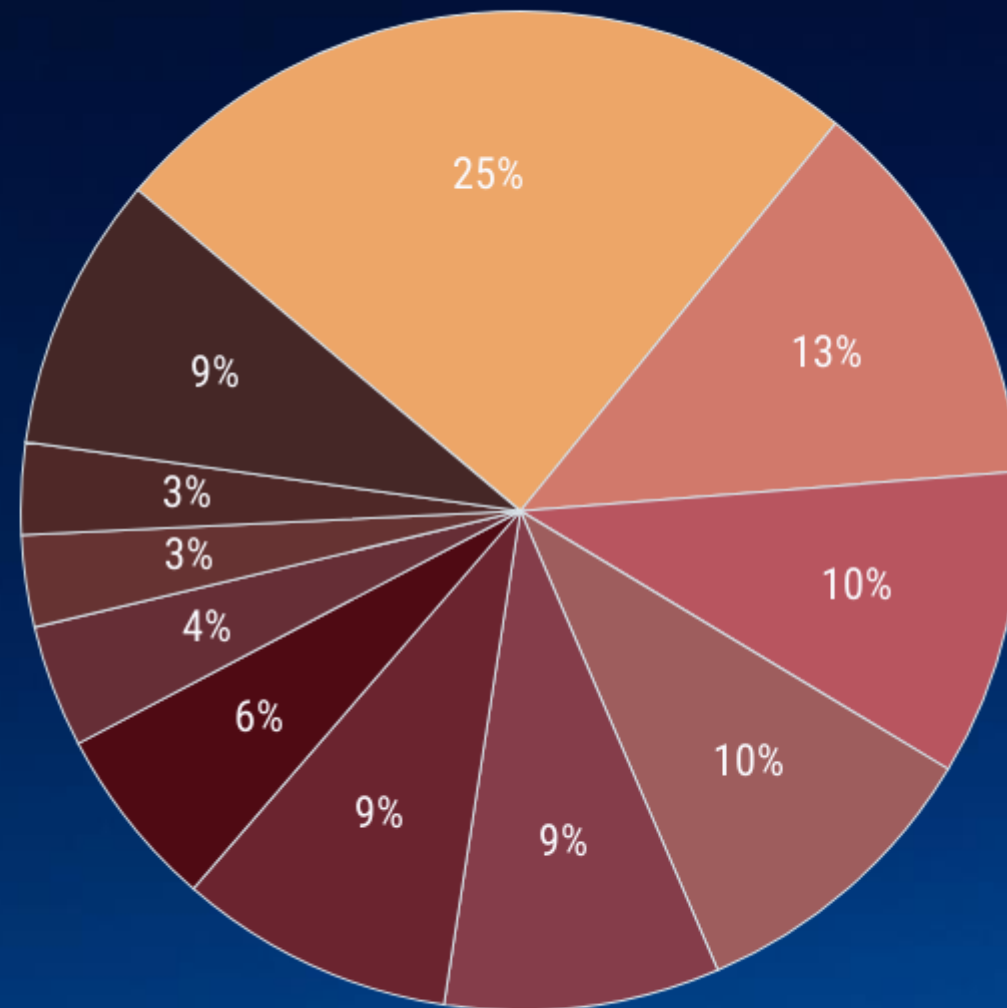
JOB LEVEL

44% of survey respondents hold director or executive level positions in their organization.

CxO	5%	
VP	4%	
Director	35%	
Manager	40%	
Practitioner	16%	

Pie chart: CxO 5%, VP 4%, Practitioner 16%, Manager 40%, Director 35%

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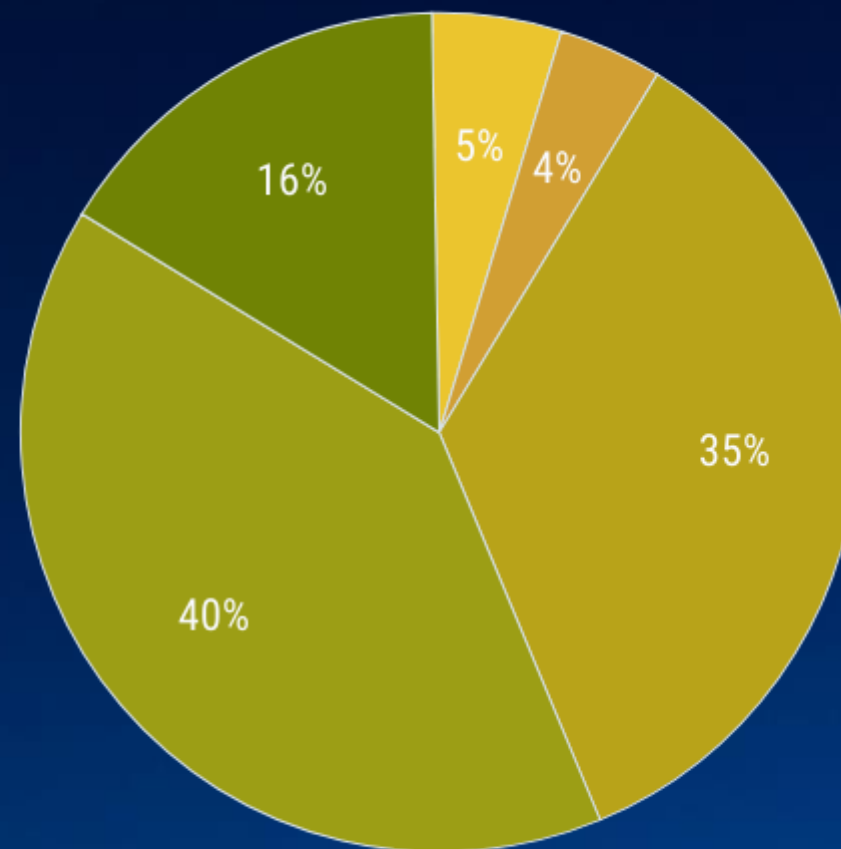
Okta is an identity and access management company that provides cloud software to help companies manage and secure user authentication into modern applications and helps developers build identity controls into applications, website web services and into devices.

Learn more at okta.com

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