2ⁿᵈ International Security Barometer

United States Edition

August 2010

PANDA
S E C U R I T Y

Contents

1. Introduction

For the second consecutive year, Panda Security has published its annual International Barometer of Security in SMBs. This year, even more countries have been included in the study. The aim of this document is to analyze the status of security in SMBs, to examine their awareness and perspective of the current malware and cyber-crime situation, and to look at the measures they take to protect themselves as well as the main factors that influence their choice of security software or providers.

The main conclusions from this year's study are:

- *Perception: SMBs across practically all regions and countries understand the importance of IT security, although a small percentage still consider it unimportant (around 7 percent).*

- *Protection:*

    o *In general terms, European countries including Spain, France, UK and Switzerland have a higher average level of protection than other regions (92 percent in Spain compared to 83 percent in the U.S., for instance). It is interesting to note that between 11 and 13 percent of companies have no security system installed, figures which coincide with the results of last year's study.*

    o *The most widely used security solutions are anti-virus and firewall products, while anti-spam solutions are not extensively implemented.*

    o *Of the majority of companies that do have some form of protection in place, 36 percent of U.S. SMBs said they were using free solutions that are designed for home users. This is dramatically more than their European counterparts, with only 14 percent turning to free solutions.*

    o *Whereas in 2009 the main reason given for not installing an anti-virus was the price, this year an equally important factor was not realizing the need for security products altogether. This indicates a lack of awareness about the problem. However, there has been a significant drop in the amount of companies that believe security software slows down systems, and an increase in those that declare they are studying the implementation of security products.*

- *Infections: The infection ratio in companies globally has slightly decreased: 58 percent to 49 percent. However, these percentages are still very high considering the negative impact that malware of any kind can have on a company.*

o *In the U.S., the Internet and USBs/external memory devices are the primary ways infections enter companies. Infections through USBs specifically showed a marked increase over last year's study.*

- *Security investment: The economic recession, along with other protection factors, has meant that many companies have not increased their security budget with respect to last year, and just 20 percent overall have increased it slightly. This was also the case last year implying that there is still a strong tendency to limit investment.*

o *Only 63 percent of SMBs in the U.S. have someone dedicated to IT security management. In Latin America this figure is 68 percent and 66 percent in Europe. Overall this figure was higher than in 2009, indicating greater security awareness and, at least in terms of human resources, greater investment.*

2. Methodology

The survey was conducted by Panda Security between April and June 2010 among non-users of Panda solutions. The survey universe consisted of companies with between two and 1,000 computers.

The sample size and distribution was 1,532 companies in the United States and 7,938 companies in the rest of the world:

Country/Region	Respondents
Spain	3141
USA	1532
UK	569
Germany	456
Brazil	436
Mexico	401
Sweden	389
Benelux	387
France	351
Italy	326
Portugal	265
Greece	199
Canada	196
Honduras	165
Russia	145
Paraguay	102
Switzerland	99
Austria	86
Venezuela	84
Costa Rica	74
Peru	67

Sample error: *Sampling error calculation has been based on p=q=0.5 for a confidence level of 95 percent.*

3. Details of the companies surveyed

The data below offers basic information about the size and characteristics of the companies that took part in the study. There is also an initial distinction between those companies with some kind of security system installed, no matter how basic, and those with no security on their computers or network.

Approximately how many employees are there in your company?
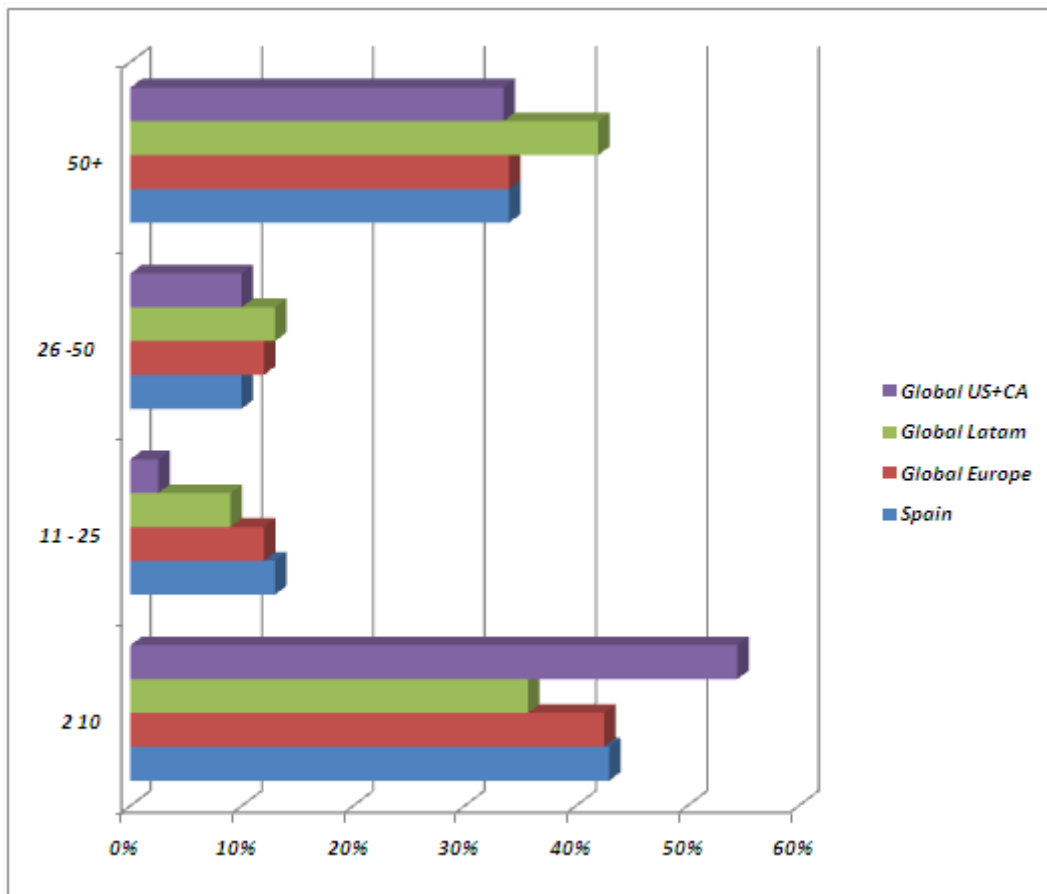
Europe	Spain	Germany	Belgium	France	Greece	Italy	Portugal	Russia	Sweden	Switzerland	UK	Global Europe
2 10	43%	46%	57%	30%	50%	60%	38%	19%	35%	41%	49%	43%
11 - 25	13%	8%	6%	30%	12%	11%	16%	20%	6%	0%	7%	12%
26 -50	10%	8%	6%	5%	19%	9%	18%	15%	8%	18%	12%	12%
50+	34%	37%	31%	35%	19%	20%	29%	45%	50%	41%	32%	34%

Latin America	Brazil	Costa Rica	Honduras	Mexico	Paraguay	Peru	Venezuela	Global Latam
2 10	28%	43%	25%	27%	45%	34%	48%	36%
11 - 25	11%	0%	0%	10%	18%	20%	4%	9%
26 -50	9%	14%	25%	14%	9%	9%	11%	13%
50+	52%	43%	50%	48%	27%	37%	37%	42%

US + Canada	US	Canada	Global US+CA
2 10	51%	58%	55%
11 - 25	5%	0%	3%
26 -50	9%	11%	10%
50+	35%	32%	34%

	Spain	Global Europe	Global Latam	Global US+CA
2 10	43%	43%	36%	55%
11 - 25	13%	12%	9%	3%
26 -50	10%	12%	13%	10%
50+	34%	34%	42%	34%

In your company, IT security is...

In general, SMBs across practically all regions and countries understand the importance of IT security, although a small percentage still consider it unimportant (around 7 percent). This figure is similar to that of 2009.
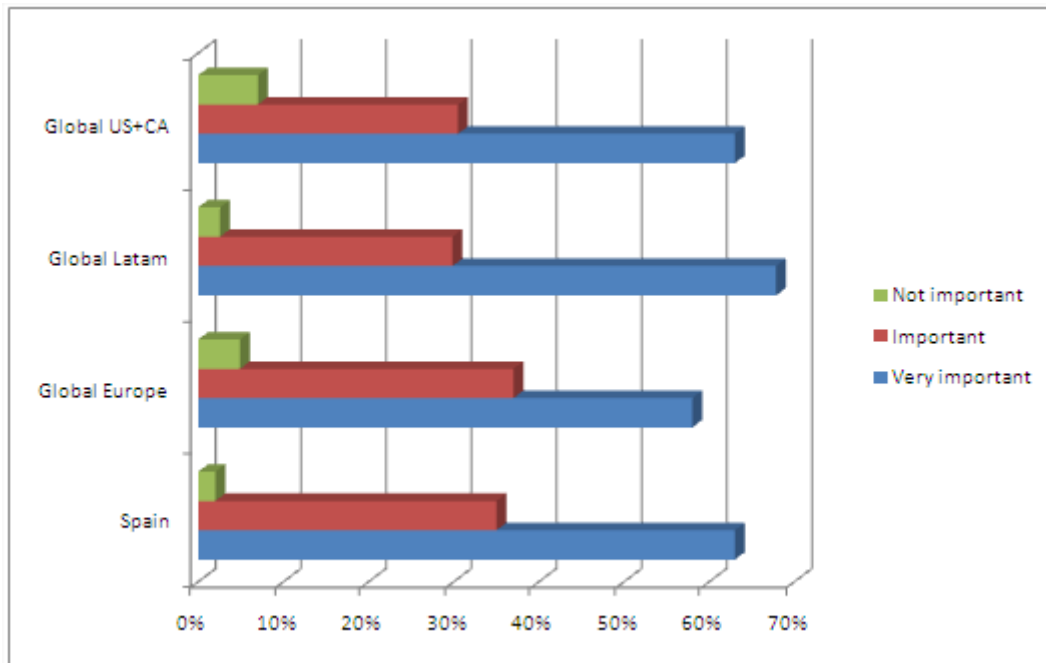
Europe	Spain	Germany	Belgium	France	Greece	Italy	Portugal	Russia	Sweden	Switzerland	UK	Global Europe
Very important	63%	56%	50%	35%	50%	67%	65%	35%	67%	81%	66%	58%
Important	35%	42%	41%	59%	50%	33%	30%	55%	24%	12%	28%	37%
Not important	2%	2%	9%	6%	0%	0%	5%	10%	9%	6%	6%	5%

Latin America	Brazil	Costa Rica	Honduras	Mexico	Paraguay	Peru	Venezuela	Global Latam
Very important	62%	57%	92%	66%	70%	66%	62%	68%
Important	32%	43%	9%	30%	30%	30%	35%	30%
Not important	6%	0%	0%	4%	0%	4%	4%	3%

US + Canada	US	Canada	Global US+CA
Very important	67%	59%	63%
Important	26%	35%	31%
Not important	8%	6%	7%

	Spain	Global Europe	Global Latam	Global US+CA
Very important	63%	58%	68%	63%
Important	35%	37%	30%	31%
Not important	2%	5%	3%	7%

Is there someone dedicated to IT security in your company?

Only 63 percent of SMBs in the U.S. have someone dedicated to IT security management. In Latin America this figure is 68 percent and 66 percent in Europe. Overall this figure was higher than in 2009, indicating greater security awareness and greater investment.
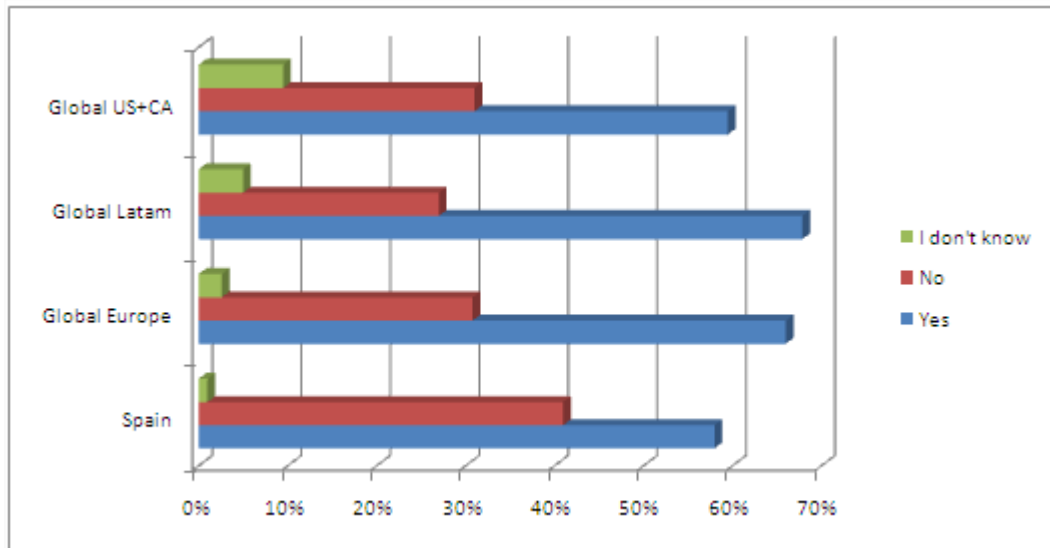
Europe	Spain	Germany	Belgium	France	Greece	Italy	Portugal	Russia	Sweden	Switzerland	UK	Global Europe
Yes	58%	78%	50%	78%	71%	60%	57%	65%	54%	94%	64%	66%
No	41%	21%	47%	22%	29%	34%	36%	29%	43%	6%	28%	31%
I don't know	1%	2%	3%	0%	0%	5%	7%	6%	2%	0%	8%	3%

Latin America	Brazil	Costa Rica	Honduras	Mexico	Paraguay	Peru	Venezuela	Global Latam
Yes	67%	71%	50%	66%	82%	58%	81%	68%
No	30%	29%	28%	31%	18%	38%	15%	27%
I don't know	2%	0%	22%	3%	0%	4%	4%	5%

US + Canada	US	Canada	Global US+CA
Yes	63%	56%	60%
No	29%	33%	31%
I don't know	8%	11%	10%

	Spain	Global Europe	Global Latam	Global US+CA
Yes	58%	66%	68%	60%
No	41%	31%	27%	31%
I don't know	1%	3%	5%	10%

Is there a security system in your company?

In general terms, European countries including Spain, France, UK and Switzerland have a higher average level of protection than other regions (92 percent in contrast to 83 percent in the U.S.). It is interesting to note that between 11 and 13 percent of companies have no security system installed, figures which coincide with the results of last year's study.
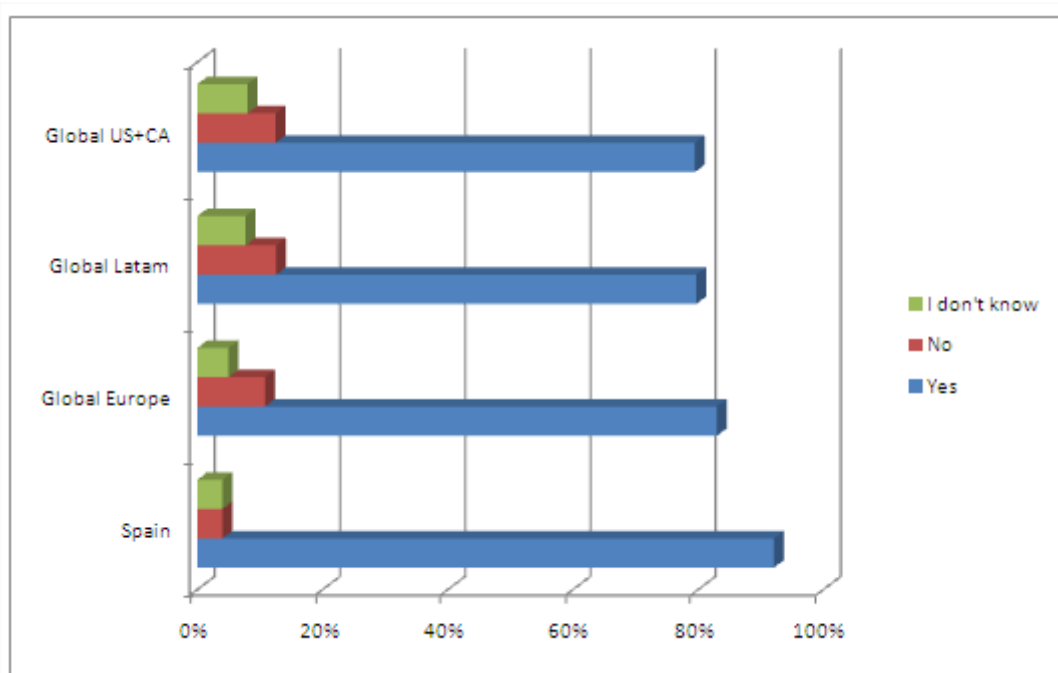
Europe	Spain	Germany	Belgium	France	Greece	Italy	Portugal	Russia	Sweden	Switzerland	UK	Global Europe
Yes	92%	86%	81%	94%	71%	84%	81%	69%	84%	93%	83%	83%
No	4%	7%	16%	6%	14%	11%	14%	22%	7%	7%	13%	11%
I don't know	4%	7%	3%	0%	14%	5%	5%	9%	9%	0%	4%	5%

Latin America	Brazil	Costa Rica	Honduras	Mexico	Paraguay	Peru	Venezuela	Global Latam
Yes	75%	71%	82%	88%	73%	77%	92%	80%
No	19%	29%	9%	7%	9%	15%	0%	13%
I don't know	6%	0%	9%	5%	18%	8%	8%	8%

US + Canada	US	Canada	Global US+CA
Yes	83%	76%	80%
No	13%	12%	13%
I don't know	4%	12%	8%

	Spain	Global Europe	Global Latam	Global US+CA
Yes	92%	83%	80%	80%
No	4%	11%	13%	13%
I don't know	4%	5%	8%	8%

4. Companies with an IT security system

Companies that said they had some kind of security were asked specific questions about the protection technologies they used.

Which security system do you use?

The most widely used security solutions are anti-virus and firewall products, while anti-spam solutions are not extensively implemented. The percentage for anti-spam measures is very low considering that 90 percent of e-mail in circulation is spam, leading to employee productivity losses and unnecessary bandwidth consumption. These figures are about the same as last year.
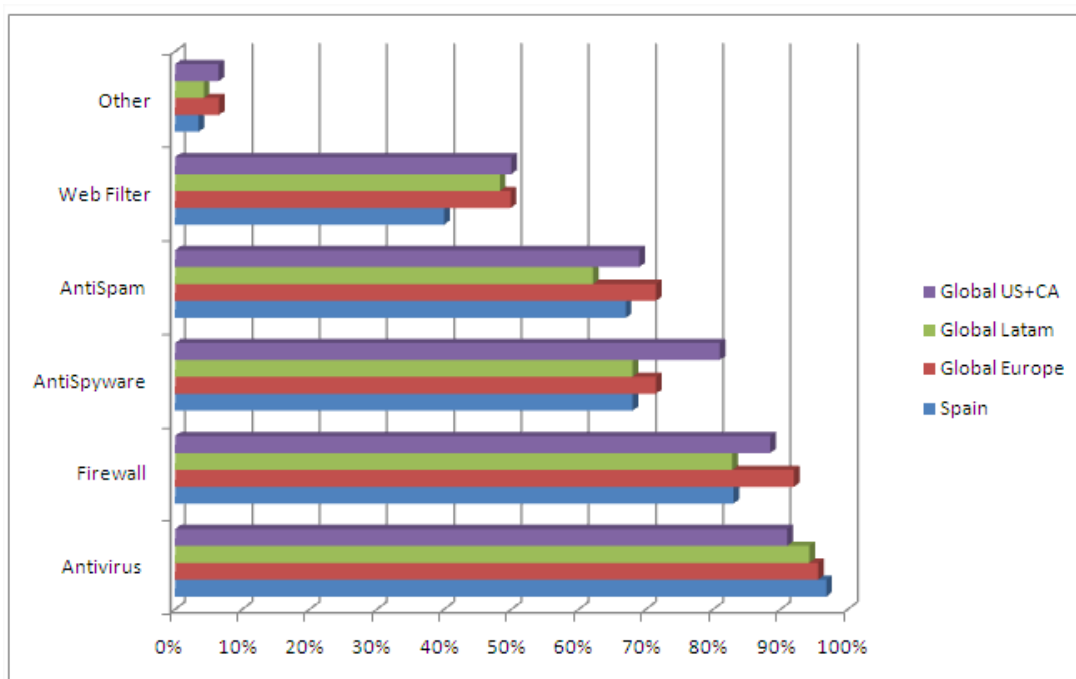
Europe	Spain	Germany	Belgium	France	Greece	Italy	Portugal	Russia	Sweden	Switzerland	UK	Global Europe
Antivirus	97%	100%	92%	88%	90%	94%	97%	98%	100%	100%	96%	96%
Firewall	83%	96%	100%	94%	100%	93%	94%	68%	97%	100%	86%	92%
AntiSpyware	68%	72%	88%	76%	60%	77%	83%	47%	65%	79%	75%	72%
AntiSpam	67%	80%	65%	71%	70%	74%	71%	55%	76%	86%	72%	72%
Web Filter	40%	40%	42%	71%	60%	49%	54%	52%	41%	50%	52%	50%
Other	4%	8%	8%	18%	0%	1%	9%	6%	5%	7%	6%	7%

Latin America	Brazil	Costa Rica	Honduras	Mexico	Paraguay	Peru	Venezuela	Global Latam
Antivirus	88%	100%	89%	94%	100%	97%	92%	94%
Firewall	89%	100%	89%	70%	87%	70%	75%	83%
AntiSpyware	55%	100%	89%	55%	50%	60%	67%	68%
AntiSpam	52%	100%	44%	45%	75%	65%	54%	62%
Web Filter	63%	60%	44%	44%	50%	40%	37%	48%
Other	3%	20%	0%	4%	0%	3%	0%	4%

US + Canada	US	Canada	Global US+CA
Antivirus	97%	85%	91%
Firewall	85%	92%	89%
AntiSpyware	77%	85%	81%
AntiSpam	69%	69%	69%
Web Filter	54%	46%	50%
Other	5%	8%	7%

	Spain	Global Europe	Global Latam	Global US+CA
Antivirus	97%	96%	94%	91%
Firewall	83%	92%	83%	89%
AntiSpyware	68%	72%	68%	81%
AntiSpam	67%	72%	62%	69%
Web Filter	40%	50%	48%	50%
Other	4%	7%	4%	7%

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How many security providers do you have?

In most of Europe and the United States, there is a tendency to use more than one security provider, unlike Spain or Latin America, where 70 percent of companies prefer to work with a single supplier.
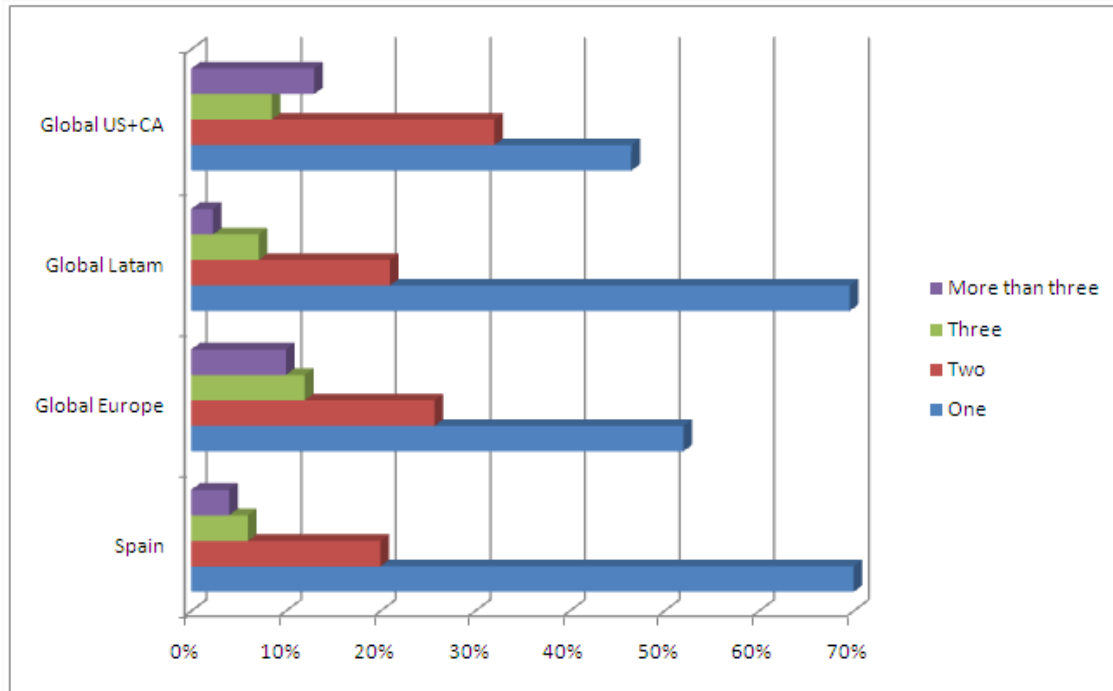
Europe	Spain	Germany	Belgium	France	Greece	Italy	Portugal	Russia	Sweden	Switzerland	UK	Global Europe
One	70%	26%	53%	47%	86%	66%	62%	44%	52%	20%	45%	52%
Two	20%	40%	33%	29%	14%	21%	23%	18%	26%	33%	30%	26%
Three	6%	21%	10%	6%	0%	7%	3%	7%	10%	40%	18%	12%
More than three	4%	13%	3%	18%	0%	7%	13%	31%	12%	7%	7%	10%

Latin America	Brazil	Costa Rica	Honduras	Mexico	Paraguay	Peru	Venezuela	Global Latam
One	72%	60%	92%	66%	56%	73%	68%	70%
Two	19%	40%	0%	26%	22%	16%	24%	21%
Three	3%	0%	9%	3%	22%	9%	4%	7%
More than three	6%	0%	0%	4%	0%	2%	4%	2%

US + Canada	US	Canada	Global US+CA
One	46%	47%	47%
Two	29%	35%	32%
Three	17%	0%	9%
More than three	8%	18%	13%

	Spain	Global Europe	Global Latam	Global US+CA
One	70%	52%	70%	47%
Two	20%	26%	21%	32%
Three	6%	12%	7%	9%
More than three	4%	10%	2%	13%

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Do you use a paid or free security solution?

Although free security solutions can be competitive, they do not cover 100 percent of a company's protection needs. Surprisingly, free software is most popular in the United States, Canada and Latin America. In Spain, this type of software accounts for just 5 percent of solutions. This figure is particularly low in comparison with the 26 percent registered in the 2009 study.
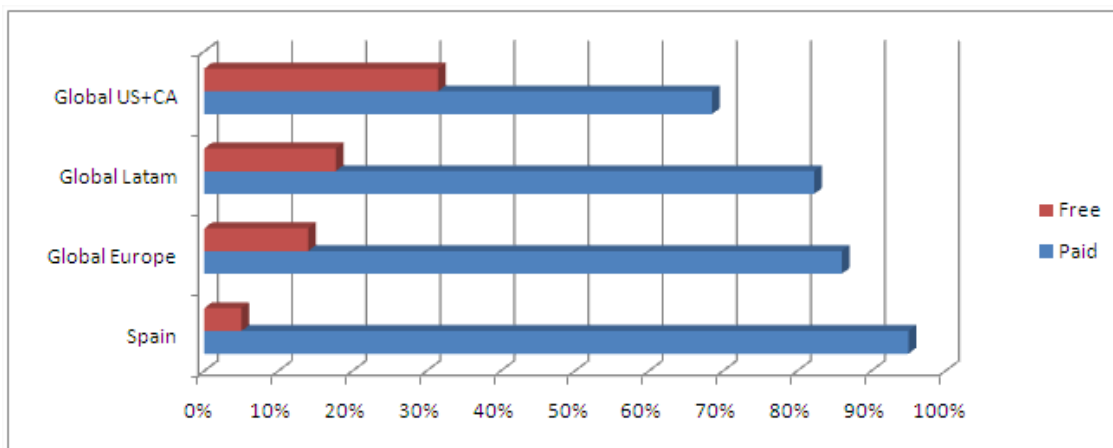
Europe	Spain	Germany	Belgium	France	Greece	Italy	Portugal	Russia	Sweden	Switzerland	UK	Global Europe
Paid	95%	94%	54%	98%	93%	80%	93%	87%	95%	80%	74%	86%
Free	5%	6%	46%	2%	7%	20%	7%	13%	5%	20%	26%	14%

Latin America	Brazil	Costa Rica	Honduras	Mexico	Paraguay	Peru	Venezuela	Global Latam
Paid	70%	80%	82%	78%	88%	98%	80%	82%
Free	30%	20%	18%	22%	12%	2%	20%	18%

US + Canada	US	Canada	Global US+CA
Paid	64%	73%	69%
Free	36%	27%	32%

Europe	Spain	Global Europe	Global Latam	Global US+CA
Paid	95%	86%	82%	69%
Free	5%	14%	18%	32%

Are your security systems up-to-date?

When asked about how up-to-date their security systems were, some 90 percent of companies claimed they were fully updated. However, between four and seven percent admitted their systems were not updated, and a similar figure simply didn't know. Evidently, these figures, which were similar across all regions, identify a serious security risk. The statistics are similar to those of 2009, although the percentage of companies that do not have updated protection has risen by between two to three points.
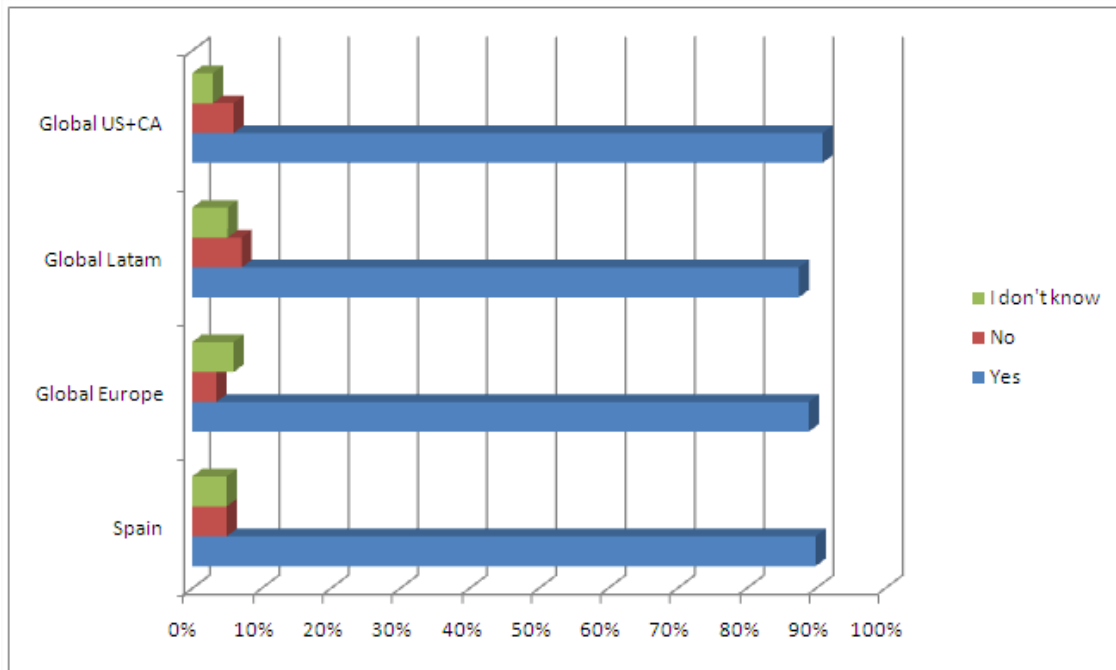
Europe	Spain	Germany	Belgium	France	Greece	Italy	Portugal	Russia	Sweden	Switzerland	UK	Global Europe
Yes	90%	85%	84%	82%	86%	94%	97%	91%	86%	100%	86%	89%
No	5%	2%	6%	6%	0%	4%	0%	5%	7%	0%	14%	4%
I don't know	5%	13%	10%	12%	14%	3%	2%	4%	7%	0%	0%	6%

Latin America	Brazil	Costa Rica	Honduras	Mexico	Paraguay	Peru	Venezuela	Global Latam
Yes	92%	89%	92%	88%	78%	91%	83%	88%
No	3%	7%	9%	8%	11%	4%	8%	7%
I don't know	5%	4%	0%	4%	11%	4%	8%	5%

US + Canada	US	Canada	Global US+CA
Yes	88%	94%	91%
No	12%	0%	6%
I don't know	0%	6%	3%

	Spain	Global Europe	Global Latam	Global US+CA
Yes	90%	89%	88%	91%
No	5%	4%	7%	6%
I don't know	5%	6%	5%	3%

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Are the rest of the programs installed on your computers and servers up-to-date?

These figures are similar to previous answers when we asked about whether other types of software, such as operating systems, were up-to-date. The highest percentage corresponds to Spain, and the most critical levels of out-of-date systems are in the United States and Canada.

It is extremely important to keep all such programs up-to-date to ensure that known vulnerabilities are properly patched. Users that do not apply the security fixes released by manufacturers run the risk of being targeted by cyber-crooks since these security holes can be used to infect or infiltrate systems.
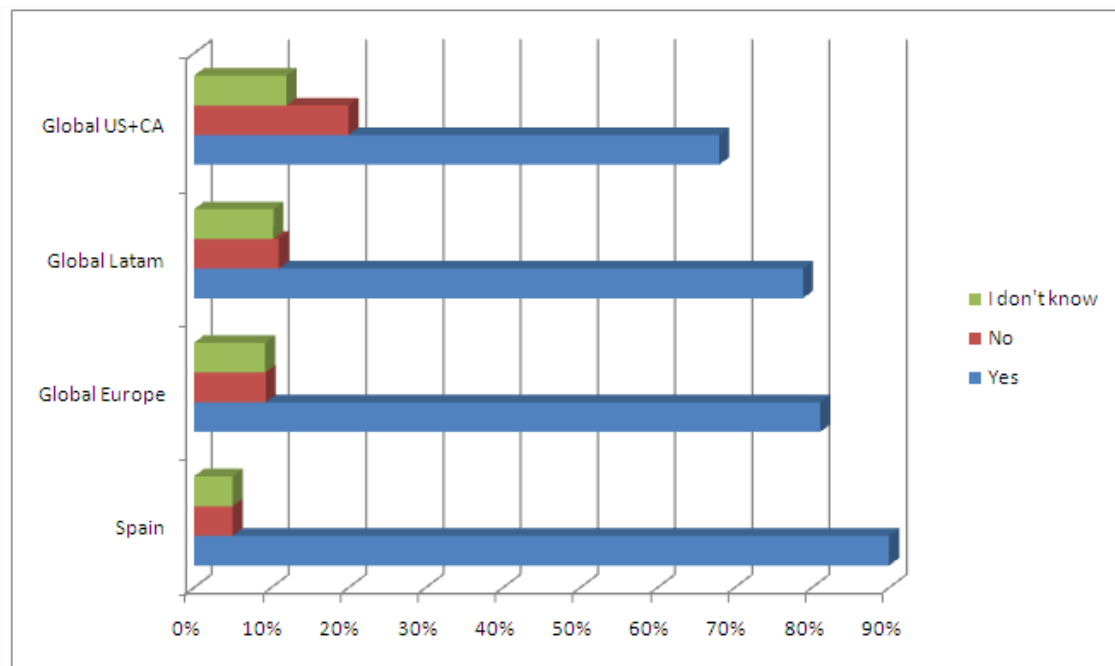
Europe	Spain	Germany	Belgium	France	Greece	Italy	Portugal	Russia	Sweden	Switzerland	UK	Global Europe
Yes	80%	79%	90%	81%	86%	89%	85%	69%	72%	80%	80%	81%
No	10%	15%	6%	12%	7%	5%	5%	17%	9%	7%	10%	9%
I don't know	10%	6%	3%	6%	7%	5%	10%	14%	18%	13%	10%	9%

Latin America	Brazil	Costa Rica	Honduras	Mexico	Paraguay	Peru	Venezuela	Global Latam
Yes	85%	79%	82%	72%	78%	75%	81%	79%
No	9%	13%	9%	20%	0%	18%	8%	11%
I don't know	6%	8%	9%	8%	22%	7%	12%	10%

US + Canada	US	Canada	Global US+CA
Yes	79%	57%	68%
No	11%	29%	20%
I don't know	10%	14%	12%

	Spain	Global Europe	Global Latam	Global US+CA
Yes	90%	81%	79%	68%
No	5%	9%	11%	20%
I don't know	5%	9%	10%	12%

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5. Companies without an IT security system

Here we detail the questions that were asked of companies without a security system installed on computers or on their networks. These questions look at the reasons behind this decision.

Why do you not have an anti-virus in your company?

Whereas in 2009 when the main reason given for not installing an anti-virus was the price, this year an equally important factor was companies deeming them not important or unnecessary. This indicates a lack of awareness about the problem. However, there has been a significant drop in the amount of companies that believe this type of software slows down systems, and an increase in those that declare that they are studying the implementation of security products.
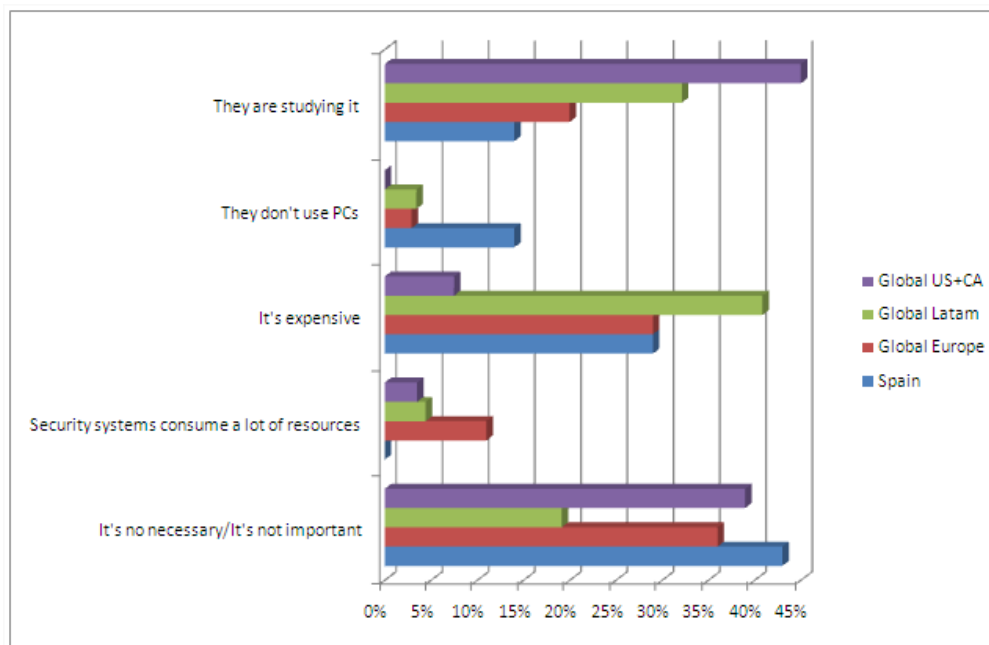
Europe	Spain	Germany	Belgium	France	Greece	Italy	Portugal	Russia	Sweden	Switzerland	UK	Global Europe
It's no necessary/It's not important	43%	8%	50%	33%	41%	37%	25%	35%	41%	25%	57%	36%
Security systems consume a lot of resources	0%	2%	30%	5%	10%	12%	25%	25%	13%	4%	0%	11%
It's expensive	29%	50%	7%	14%	45%	12%	50%	25%	36%	37%	14%	29%
They don't use PCs	14%	0%	0%	2%	0%	12%	0%	0%	1%	1%	0%	3%
They are studying it	14%	40%	13%	46%	4%	25%	0%	15%	10%	23%	29%	20%

Latin America	Brazil	Costa Rica	Honduras	Mexico	Paraguay	Peru	Venezuela	Global Latam
It's no necessary/It's not important	12%	22%	26%	5%	17%	17%	35%	19%
Security systems consume a lot of resources	12%	7%	4%	0%	6%	0%	2%	4%
It's expensive	41%	45%	49%	60%	55%	0%	36%	41%
They don't use PCs	11%	1%	10%	0%	1%	0%	1%	3%
They are studying it	24%	25%	11%	35%	21%	83%	26%	32%

US + Canada	US	Canada	Global US+CA
It's no necessary/It's not important	57%	21%	39%
Security systems consume a lot of resources	0%	7%	4%
It's expensive	14%	1%	8%
They don't use PCs	0%	0%	0%
They are studying it	29%	61%	45%

	Spain	Global Europe	Global Latam	Global US+CA
It's no necessary/It's not important	43%	36%	19%	39%
Security systems consume a lot of resources	0%	11%	4%	4%
It's expensive	29%	29%	41%	8%
They don't use PCs	14%	3%	3%	0%
They are studying it	14%	20%	32%	45%

Are you thinking of purchasing security software in the next six months?

Companies without an anti-virus installed, generally speaking, are not thinking of doing so in the next six months. In 2009 however, approximately 50 percent of respondents claimed they were thinking of buying a security system within this period.
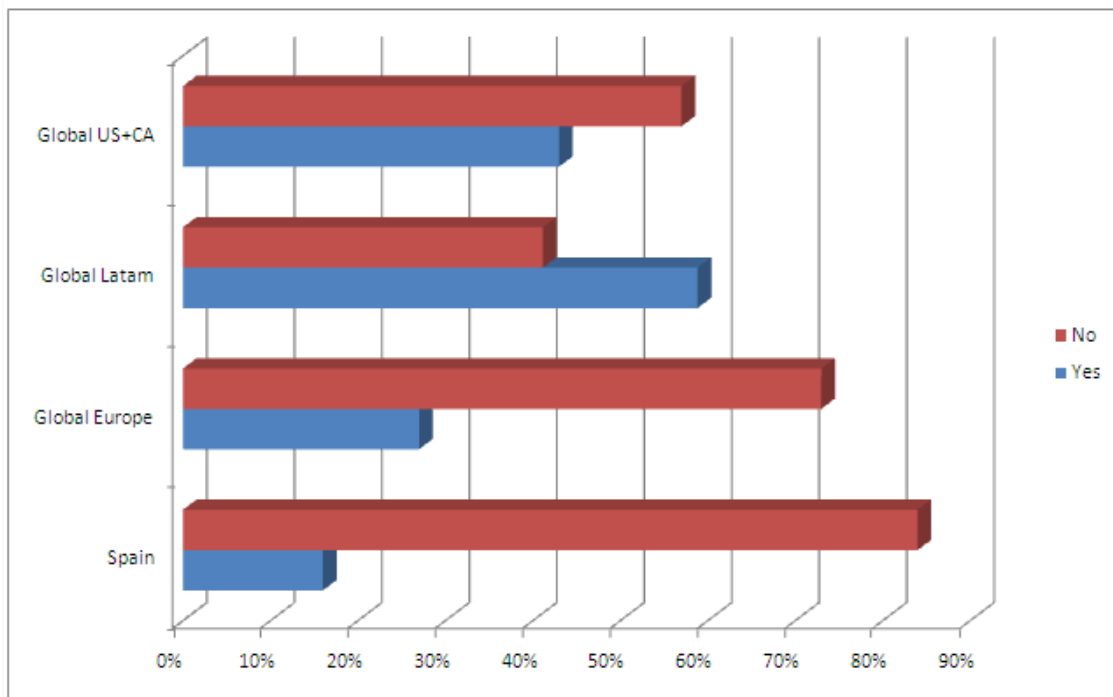
Europe	Spain	Germany	Belgium	France	Greece	Italy	Portugal	Russia	Sweden	Switzerland	UK	Global Europe
Yes	16%	26%	16%	7%	31%	24%	17%	38%	34%	40%	43%	27%
No	84%	74%	84%	93%	69%	76%	83%	62%	66%	60%	57%	73%

Latin America	Brazil	Costa Rica	Honduras	Mexico	Paraguay	Peru	Venezuela	Global Latam
Yes	40%	82%	82%	38%	50%	56%	64%	59%
No	60%	18%	18%	62%	50%	44%	36%	41%

US + Canada	US	Canada	Global US+CA
Yes	43%	43%	43%
No	57%	57%	57%

|	Spain	Global Europe	Global Latam	Global US+CA
Yes	16%	27%	59%	43%
No	84%	73%	41%	57%

6. Infections and other Internet threats

The survey also asked companies if users had ever been infected by malware and if so, what the effects were.

Were any of the computers in your company infected by any Internet threats?

The infection ratio in companies in the United States has slightly increased since last year (46 percent in 2010 compared to 49 percent in 2009). Meanwhile, it has dropped in Spain (59 percent in 2010 compared to 64 percent in 2009) and in Europe (49 percent from 58 percent). However, these percentages are still very high, considering the negative impact that malware of any kind can have on a company.
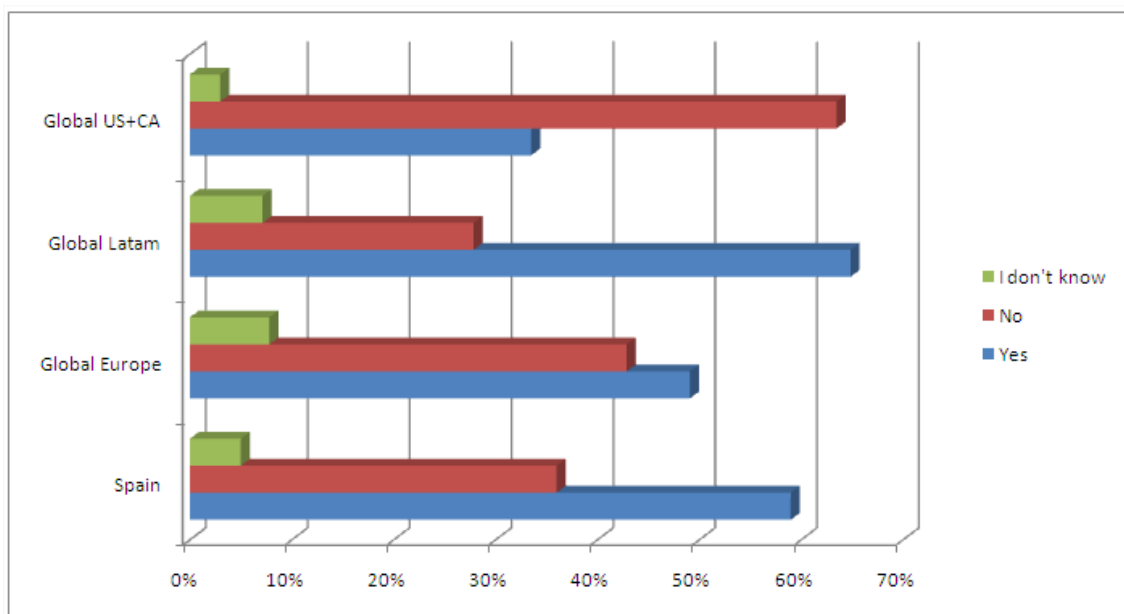
Europe	Spain	Germany	Belgium	France	Greece	Italy	Portugal	Russia	Sweden	Switzerland	UK	Global Europe
Yes	59%	54%	40%	53%	54%	57%	46%	30%	34%	64%	46%	49%
No	36%	33%	57%	47%	31%	36%	51%	51%	51%	36%	48%	43%
I don't know	5%	13%	3%	0%	15%	7%	2%	18%	15%	0%	6%	8%

Latin America	Brazil	Costa Rica	Honduras	Mexico	Paraguay	Peru	Venezuela	Global Latam
Yes	65%	20%	60%	60%	89%	77%	83%	65%
No	32%	60%	30%	37%	11%	17%	8%	28%
I don't know	3%	20%	10%	4%	0%	5%	8%	7%

US + Canada	US	Canada	Global US+CA
Yes	46%	21%	34%
No	48%	79%	64%
I don't know	6%	0%	3%

	Spain	Global Europe	Global Latam	Global US+CA
Yes	59%	49%	65%	34%
No	36%	43%	28%	64%
I don't know	5%	8%	7%	3%

What type of threats affected your company?

'Viruses' are still the most frequent answer, although this may be cause by the generic use of the term by non-technical users, and for many the term includes infections by Trojans, fake anti-virus and so forth. In relation to 2009, infections by spyware rose significantly.
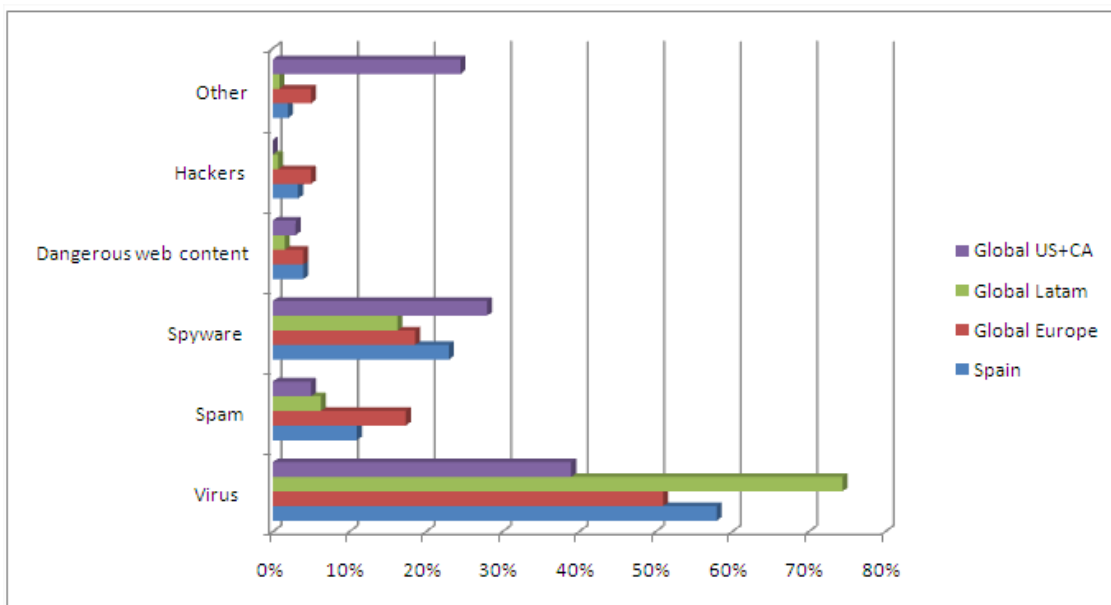
Europe	Spain	Germany	Belgium	France	Greece	Italy	Portugal	Russia	Sweden	Switzerland	UK	Global Europe
Virus	58%	61%	42%	50%	57%	37%	47%	58%	29%	76%	45%	51%
Spam	11%	21%	25%	0%	29%	30%	11%	9%	36%	2%	10%	17%
Spyware	23%	11%	8%	25%	14%	30%	26%	13%	36%	0%	23%	19%
Dangerous web content	4%	0%	0%	12%	0%	0%	0%	7%	0%	11%	6%	4%
Hackers	3%	7%	8%	12%	0%	2%	16%	7%	0%	0%	0%	5%
Other	2%	0%	17%	0%	0%	0%	0%	7%	0%	11%	16%	5%

Latin America	Brazil	Costa Rica	Honduras	Mexico	Paraguay	Peru	Venezuela	Global Latam
Virus	64%	100%	83%	64%	75%	65%	70%	74%
Spam	11%	0%	0%	9%	0%	19%	5%	6%
Spyware	19%	0%	17%	20%	25%	13%	20%	16%
Dangerous web content	1%	0%	0%	5%	0%	0%	5%	2%
Hackers	3%	0%	0%	2%	0%	0%	0%	1%
Other	1%	0%	0%	2%	0%	3%	0%	1%

US + Canada	US	Canada	Global US+CA
Virus	45%	33%	39%
Spam	10%	0%	5%
Spyware	23%	33%	28%
Dangerous web content	6%	0%	3%
Hackers	0%	0%	0%
Other	16%	33%	25%

	Spain	Global Europe	Global Latam	Global US+CA
Virus	58%	51%	74%	39%
Spam	11%	17%	6%	5%
Spyware	23%	19%	16%	28%
Dangerous web content	4%	4%	2%	3%
Hackers	3%	5%	1%	0%
Other	2%	5%	1%	25%

How did the infection affect you?

Loss of time and productivity as well as interference with computers are the main consequences of infections worldwide, followed by the loss of information. At a time when practically all malware is aimed at stealing confidential data to be used for fraud, it may be difficult to assess the effects of malware as many infections, and consequently theft of data, go undetected by users.
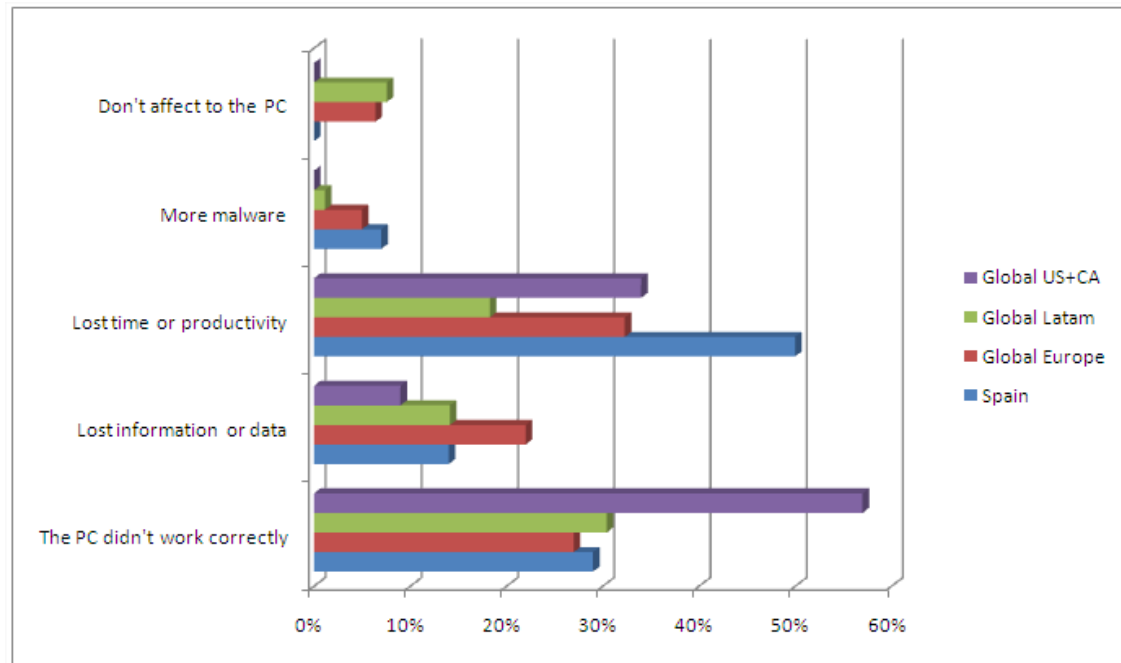
Europe	Spain	Germany	Belgium	France	Greece	Italy	Portugal	Russia	Sweden	Switzerland	UK	Global Europe
The PC didn't work correctly	29%	14%	67%	0%	0%	10%	0%	31%	33%	68%	50%	27%
Lost information or data	14%	0%	0%	0%	100%	0%	100%	0%	0%	0%	25%	22%
Lost time or productivity	50%	45%	33%	0%	0%	70%	0%	25%	67%	33%	25%	32%
More malware	7%	14%	0%	0%	0%	10%	0%	19%	0%	0%	0%	5%
Don't affect to the PC	0%	29%	0%	0%	0%	10%	0%	25%	0%	0%	0%	6%

Latin America	Brazil	Costa Rica	Honduras	Mexico	Paraguay	Peru	Venezuela	Global Latam
The PC didn't work correctly	44%	0%	100%	23%	0%	29%	17%	30%
Lost information or data	22%	0%	0%	15%	0%	29%	33%	14%
Lost time or productivity	28%	0%	0%	54%	0%	29%	17%	18%
More malware	0%	0%	0%	8%	0%	0%	0%	1%
Don't affect to the PC	6%	0%	0%	0%	0%	14%	33%	8%

US + Canada	US	Canada	Global US+CA
The PC didn't work correctly	64%	50%	57%
Lost information or data	18%	0%	9%
Lost time or productivity	18%	50%	34%
More malware	0%	0%	0%
Don't affect to the PC	0%	0%	0%

	Spain	Global Europe	Global Latam	Global US+CA
The PC didn't work correctly	29%	27%	30%	57%
Lost information or data	14%	22%	14%	9%
Lost time or productivity	50%	32%	18%	34%
More malware	7%	5%	1%	0%
Don't affect to the PC	0%	6%	8%	0%

How did viruses get into your company?

Globally, e-mail continues to be the main entry point for malware along with the Internet. This year however, there has been a marked increase in the number of infections through USB drives. There has been a drop in infections caused by Internet downloads, P2P networks or chats/IRC or messaging, possibly due to reduced use of these channels.
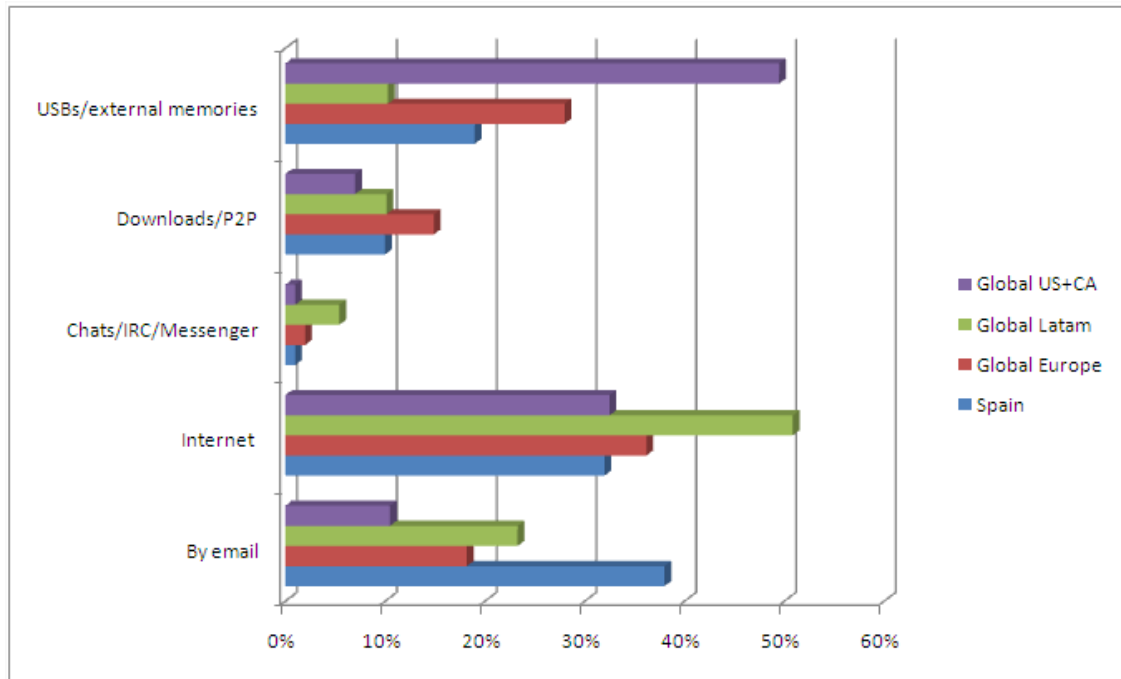
Europe	Spain	Germany	Belgium	France	Greece	Italy	Portugal	Russia	Sweden	Switzerland	UK	Global Europe
By email	38%	28%	7%	7%	8%	21%	17%	14%	21%	21%	16%	18%
Internet	32%	30%	56%	43%	15%	41%	37%	49%	30%	29%	33%	36%
Chats/IRC/Messenger	1%	2%	0%	14%	0%	0%	3%	0%	6%	0%	0%	2%
Downloads/P2P	10%	9%	11%	0%	23%	10%	9%	20%	36%	21%	16%	15%
USBs/external memories	19%	30%	26%	36%	54%	29%	34%	17%	6%	29%	33%	28%

Latin America	Brazil	Costa Rica	Honduras	Mexico	Paraguay	Peru	Venezuela	Global Latam
By email	32%	20%	10%	21%	22%	29%	29%	23%
Internet	28%	80%	50%	43%	56%	53%	46%	51%
Chats/IRC/Messenger	4%	0%	10%	4%	0%	3%	17%	5%
Downloads/P2P	9%	0%	20%	22%	11%	5%	4%	10%
USBs/external memories	26%	0%	10%	10%	11%	11%	4%	10%

US + Canada	US	Canada	Global US+CA
By email	21%	0%	11%
Internet	32%	33%	33%
Chats/IRC/Messenger	2%	0%	1%
Downloads/P2P	14%	0%	7%
USBs/external memories	32%	67%	50%

	Spain	Global Europe	Global Latam	Global US+CA
By email	38%	18%	23%	11%
Internet	32%	36%	51%	33%
Chats/IRC/Messenger	1%	2%	5%	1%
Downloads/P2P	10%	15%	10%	7%
USBs/external memories	19%	28%	10%	50%

7. IT security investment

Companies were also asked about their annual security investment.

What was your IT security budget this year in comparison with last year?

The economic recession, along with other protection factors, has meant that many companies have not increased their security budget with respect to last year, and just 20 percent overall have increased it slightly. This was also the case last year, indicating that there is still a strong tendency to limit investment.
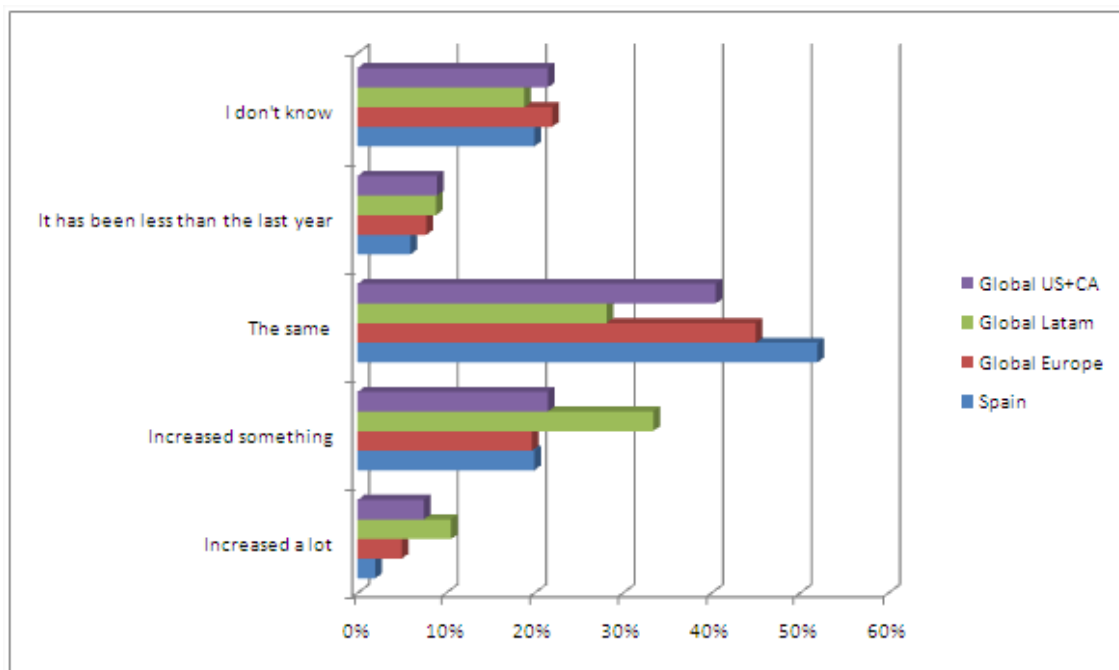
Europe	Spain	Germany	Belgium	France	Greece	Italy	Portugal	Russia	Sweden	Switzerland	UK	Global Europe
Increased a lot	2%	2%	8%	0%	0%	3%	0%	7%	3%	14%	15%	5%
Increased something	20%	17%	36%	20%	17%	19%	28%	20%	6%	14%	20%	20%
The same	52%	54%	32%	27%	67%	51%	46%	35%	53%	43%	32%	45%
It has been less than the last year	6%	0%	12%	20%	0%	5%	5%	11%	12%	7%	13%	8%
I don't know	20%	27%	12%	33%	17%	22%	21%	27%	26%	21%	20%	22%

Latin America	Brazil	Costa Rica	Honduras	Mexico	Paraguay	Peru	Venezuela	Global Latam
Increased a lot	11%	0%	10%	6%	12%	11%	24%	11%
Increased something	28%	40%	30%	26%	62%	29%	19%	33%
The same	24%	20%	30%	29%	25%	40%	29%	28%
It has been less than the last year	11%	20%	10%	8%	0%	3%	10%	9%
I don't know	27%	20%	20%	29%	0%	17%	19%	19%

US + Canada	US	Canada	Global US+CA
Increased a lot	15%	0%	8%
Increased something	20%	23%	22%
The same	35%	46%	41%
It has been less than the last year	10%	8%	9%
I don't know	20%	23%	22%

	Spain	Global Europe	Global Latam	Global US+CA
Increased a lot	2%	5%	11%	8%
Increased something	20%	20%	33%	22%
The same	52%	45%	28%	41%
It has been less than the last year	6%	8%	9%	9%
I don't know	20%	22%	19%	22%

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8. IT security training

Do you or other employees in your company receive training about security and current threats?

Overall, only 40 percent of employees receive training about IT security. In some cases this is free and in others it is paid for. However, the percentage of users who receive no training is very high, leading to an increased risk of employees falling victim to scams and other threats. These figures overall are similar to those in 2009.
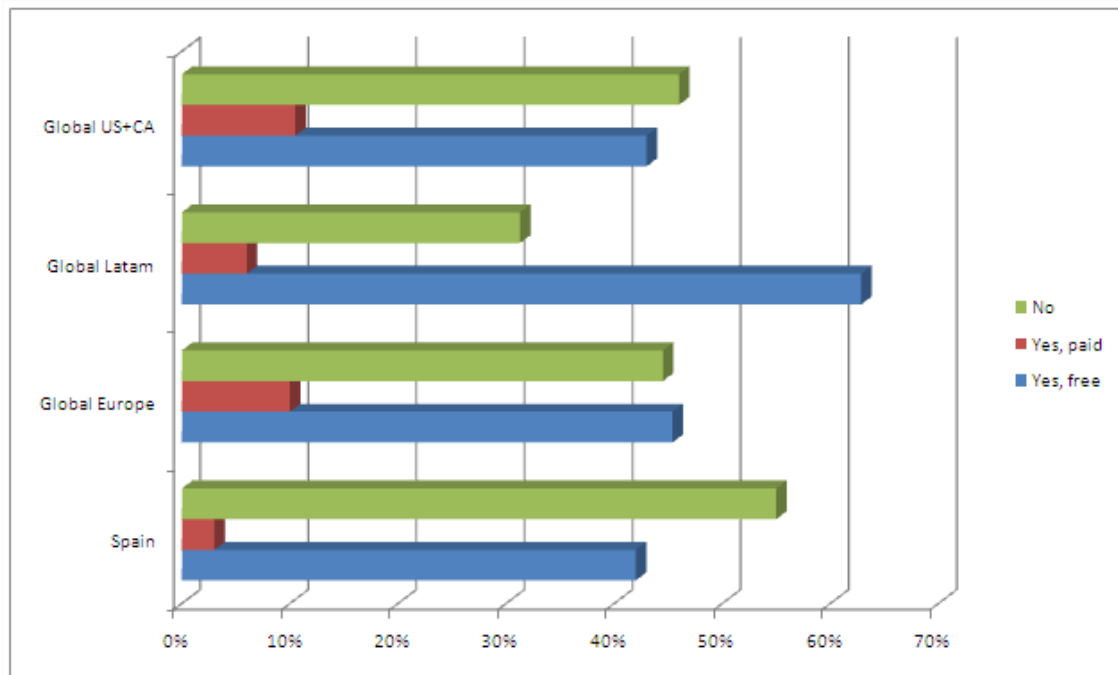
Europe	Spain	Germany	Belgium	France	Greece	Italy	Portugal	Russia	Sweden	Switzerland	UK	Global Europe
Yes, free	42%	52%	40%	36%	64%	62%	46%	25%	44%	43%	46%	45%
Yes, paid	3%	11%	4%	7%	9%	12%	26%	11%	3%	14%	8%	10%
No	55%	36%	56%	57%	27%	26%	28%	64%	53%	43%	46%	45%

Latin America	Brazil	Costa Rica	Honduras	Mexico	Paraguay	Peru	Venezuela	Global Latam
Yes, free	37%	80%	60%	48%	100%	58%	57%	63%
Yes, paid	14%	0%	10%	10%	0%	3%	5%	6%
No	50%	20%	30%	42%	0%	39%	38%	31%

US + Canada	US	Canada	Global US+CA
Yes, free	48%	38%	43%
Yes, paid	6%	15%	11%
No	46%	46%	46%

	Spain	Global Europe	Global Latam	Global US+CA
Yes, free	42%	45%	63%	43%
Yes, paid	3%	10%	6%	11%
No	55%	45%	31%	46%

Does your company have a security policy?

Security policies have an important role to play in influencing the way that employees behave and thereby preventing security problems, managing incidents and reacting rapidly to infections to mitigate productivity losses. A significant percentage of SMBs – some 60 percent – have implemented such policies. However, around 35 percent across all regions have no internal security policy.
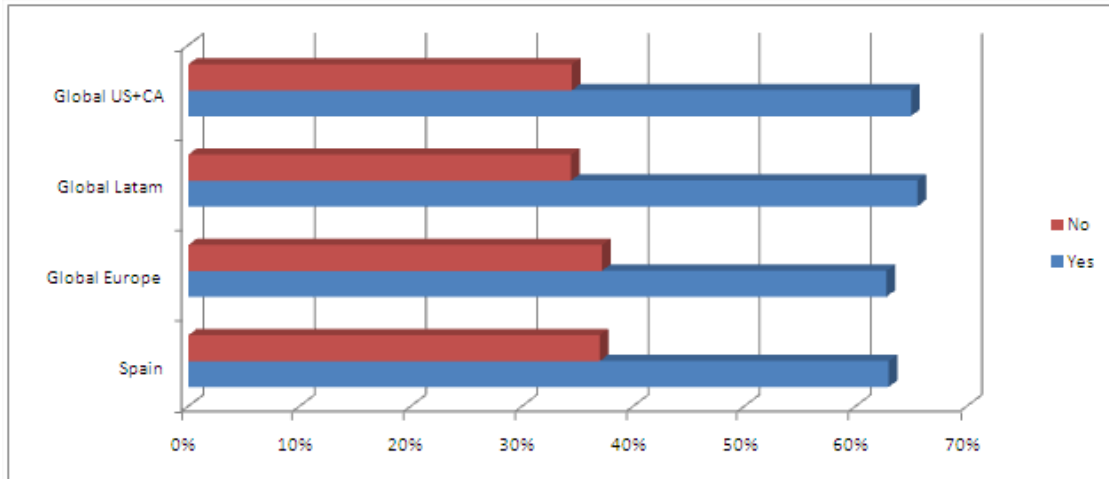
Europe	Spain	Germany	Belgium	France	Greece	Italy	Portugal	Russia	Sweden	Switzerland	UK	Global Europe
Yes	63%	65%	64%	60%	36%	74%	77%	57%	59%	73%	70%	63%
No	37%	35%	36%	40%	64%	26%	23%	43%	41%	27%	30%	37%

Latin America	Brazil	Costa Rica	Honduras	Mexico	Paraguay	Peru	Venezuela	Global Latam
Yes	65%	60%	70%	67%	70%	56%	71%	66%
No	35%	40%	30%	33%	30%	44%	29%	34%

US + Canada	US	Canada	Global US+CA
Yes	69%	61%	65%
No	31%	38%	35%

	Spain	Global Europe	Global Latam	Global US+CA
Yes	63%	63%	66%	65%
No	37%	37%	34%	35%

9. Conclusions

The main conclusions of this study include the high number of companies that have suffered infections: Forty-six percent in the United States, 49 percent in Europe, and 65 percent in Latin America. In any event, the number of U.S. SMBs suffering infections is similar to that in Europe (the highest ratio in Europe is Switzerland with 64 percent). Infections had the greatest impact in Latin America.

The underlying reason in many cases would appear to be the use of very basic and traditional anti-virus without using more innovative technologies such as anti-spam and SaaS solutions.

Similarly there are still many users who rely solely on free anti-virus products, which can be very effective for protecting home users but do not address all the security needs of companies.

The scarce implementation of additional security measures such as anti-spyware or anti-spam is another revealing find of the study. This would appear to be directly related with the static level of investment in security.

Those countries that invest more in security such as firewalls, anti-spam and anti-spyware show the lowest levels of infections.

It is also noteworthy that 29 percent of U.S. SMBs do not have anyone dedicated to IT security management. Having a specialist or managed services provider to take care of security issues can reduce the number of infections in companies, although companies should still provide employee training and maintain an up-to-date security policy.

Regarding companies without a security system, perhaps the most pertinent finding is the number of companies who simply feel it is not necessary or important. One year ago, the main reason given for not installing an ant-virus was the price. This continues to be the case in Latin America (41 percent).

In conclusion, it is clear from the data compiled that SMBs in all regions need to heighten investment in security, and to create and enforce security policies. It is also clear that companies need to be made aware of the growing number of cyber-threats appearing every day and they must also learn that simple, reactive anti-virus products offer insufficient protection. In this complex threat climate, SMBs require proactive anti-virus solutions, cloud security, SaaS (Security as a Service), anti-spam filters and perimeter protection to keep systems out of harm's way and maintain employee productivity.