

Potential business impact of 'cybercrime' for small and medium enterprises (SMEs) in 2015

Global survey report

December, 2015

Group Marketing & Communications Insights




Potential business impact of cybercrime for SMEs in 2015

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Potential business impact of cybercrime for SMEs in 2015

Method




Telephone Interviews (CATI)
Average length: 6 minutes

Sample structure




200 interviews per country, representative for SMEs relating to enterprise size (in terms of full-time employees) and industry

Target Group



SME
(0-250 Full-time employees)



CEO/Owner, GM,
CFO/Treasurer,
COO/Head of Operations

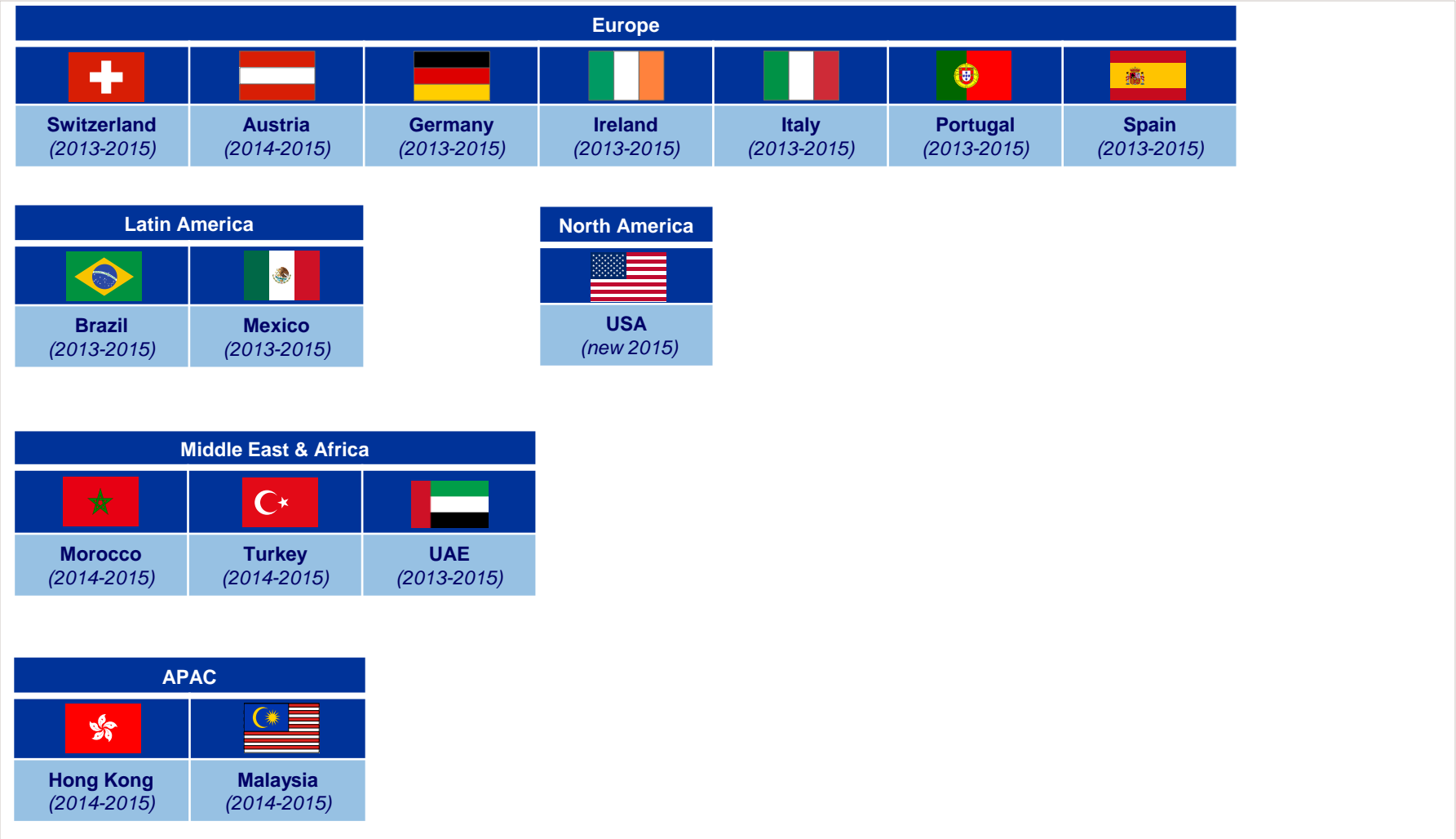
Indication of differences

Illustrative example

	2015	2014	2013
	(a)	(b)	(c)
Throughout the report, significant differences (95% confidence level) are highlighted through Letter Codes which indicate the comparison data set	17.0 ^{b,c}	8.0	8.8
	14.5	20.5	33.2 ^{ab}
	29.5 ^c	28.5 ^c	17.6
	9.5	10.0 ^c	4.8
	8.5	5.0	6.4

Project design

Potential business impact of cybercrime for SMEs in 2015



Management summary

Potential business impact of cybercrime for small and medium enterprises (SMEs) in 2015



Potential business impact of cybercrime for SMEs in 2015

2015 global results

- i) From a list of 9 potential threats resulting from cybercrime, 1 out of 3 SMEs rate **Theft of customer data** as most critical – this also represents the highest risk of all.
- ii) 16% of SMEs around the globe rate **Damage of reputation** as second. However, a variety of other potential threats follows closely behind.
- iii) Overall, 1 out of 3 SMEs seem not to worry about cybercrime at all, the majority of which considers themselves to be **too insignificant for cybercrime** but also because **protection systems are in place** as well as for other reasons.

Potential business impact of cybercrime for SMEs in 2015

2015 regional results

- i) Theft of customer data** is consistently rated as the most critical risk of cybercrime by SMEs across all regions, whilst **Cause 3rd party lawsuit** is consistently rated as least worrying.
- ii) Damage reputation** appears to be less of a concern for SMEs in **Europe** and the **USA**, (ranked 6th vs. 2nd in the other regions).
- iii) Business disruption** is of particularly high concern in **Europe**, (ranked 2nd).
- iv) LATAM** SMEs (though mostly Brazilians) **haven't thought about /have no opinion on** cybercrime relatively more often than their peers from the other regions.

Global results

Potential business impact of cybercrime for small and medium enterprises (SMEs) in 2015

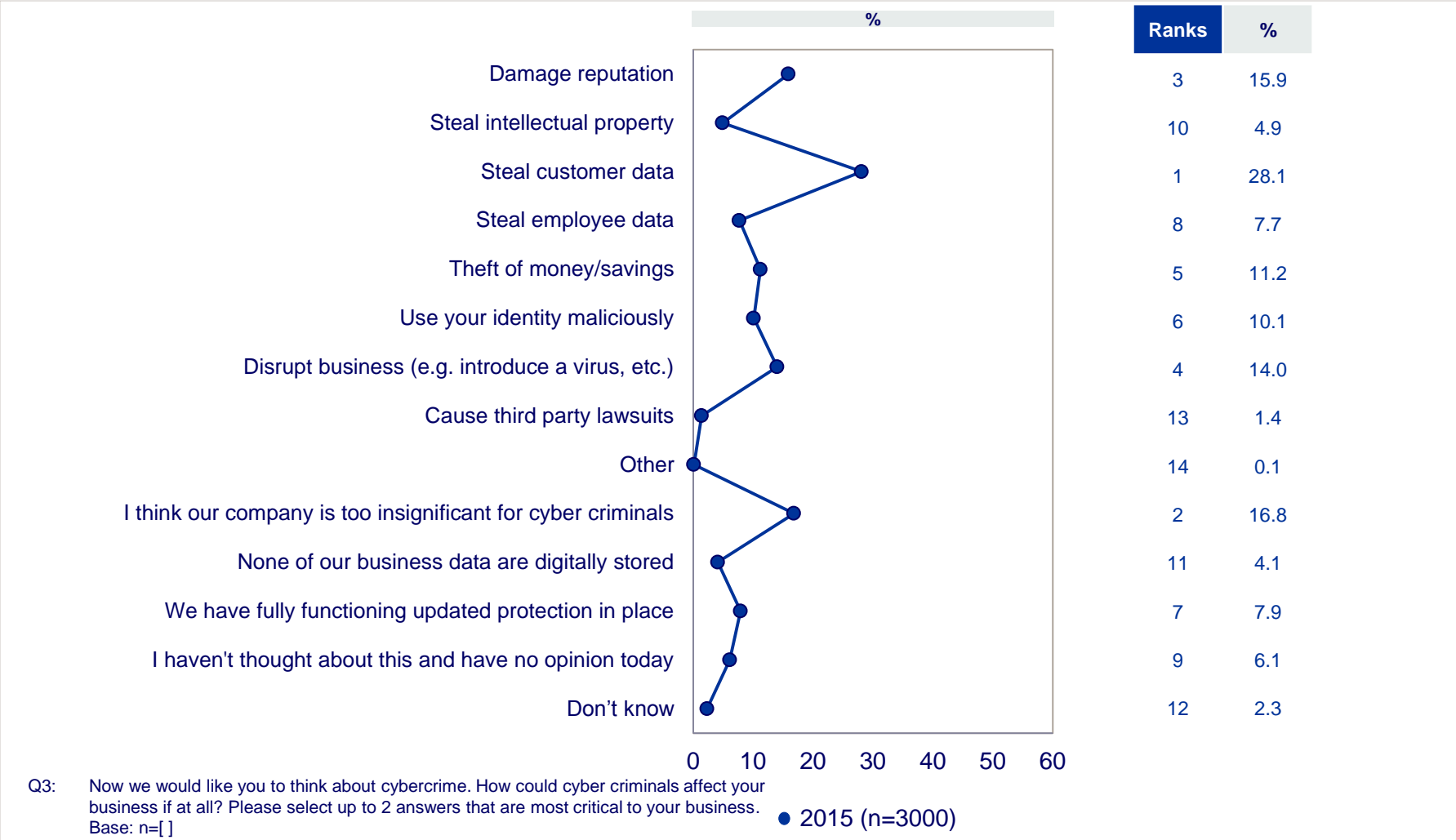


Global results: 'Theft of customer data' is seen as the most critical risk of cybercrime



Potential business impact of cybercrime for SMEs in 2015

Statistics in % and ranks / All countries



Results by region

Potential business impact of cybercrime for small and medium enterprises (SMEs) in 2015

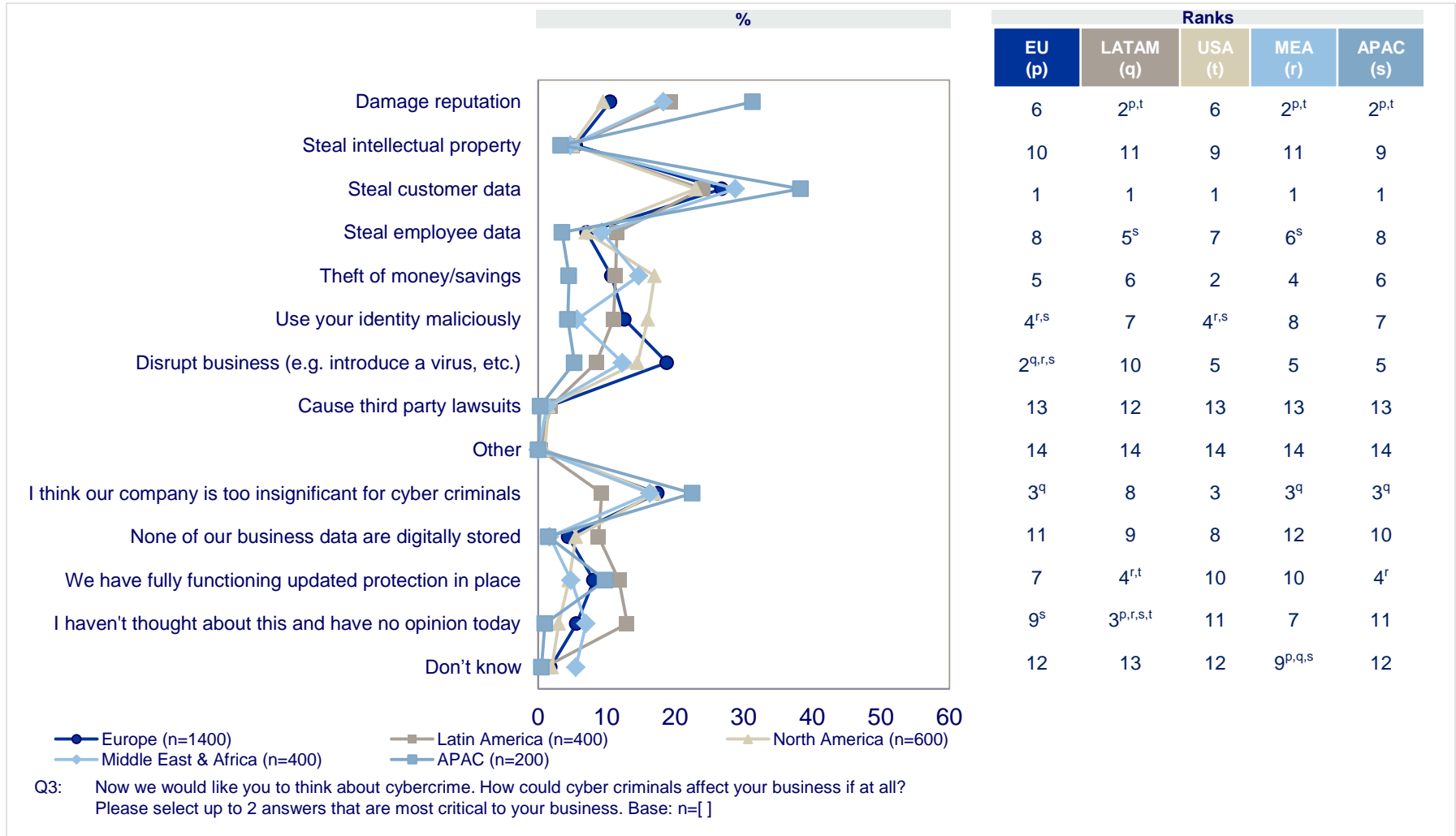


Regional comparison: 'Theft of customer data' is consistently rated as the most critical risk of cybercrime across all regions



Potential business impact of cybercrime for SMEs in 2015

Regional comparison / statistics in % and ranks

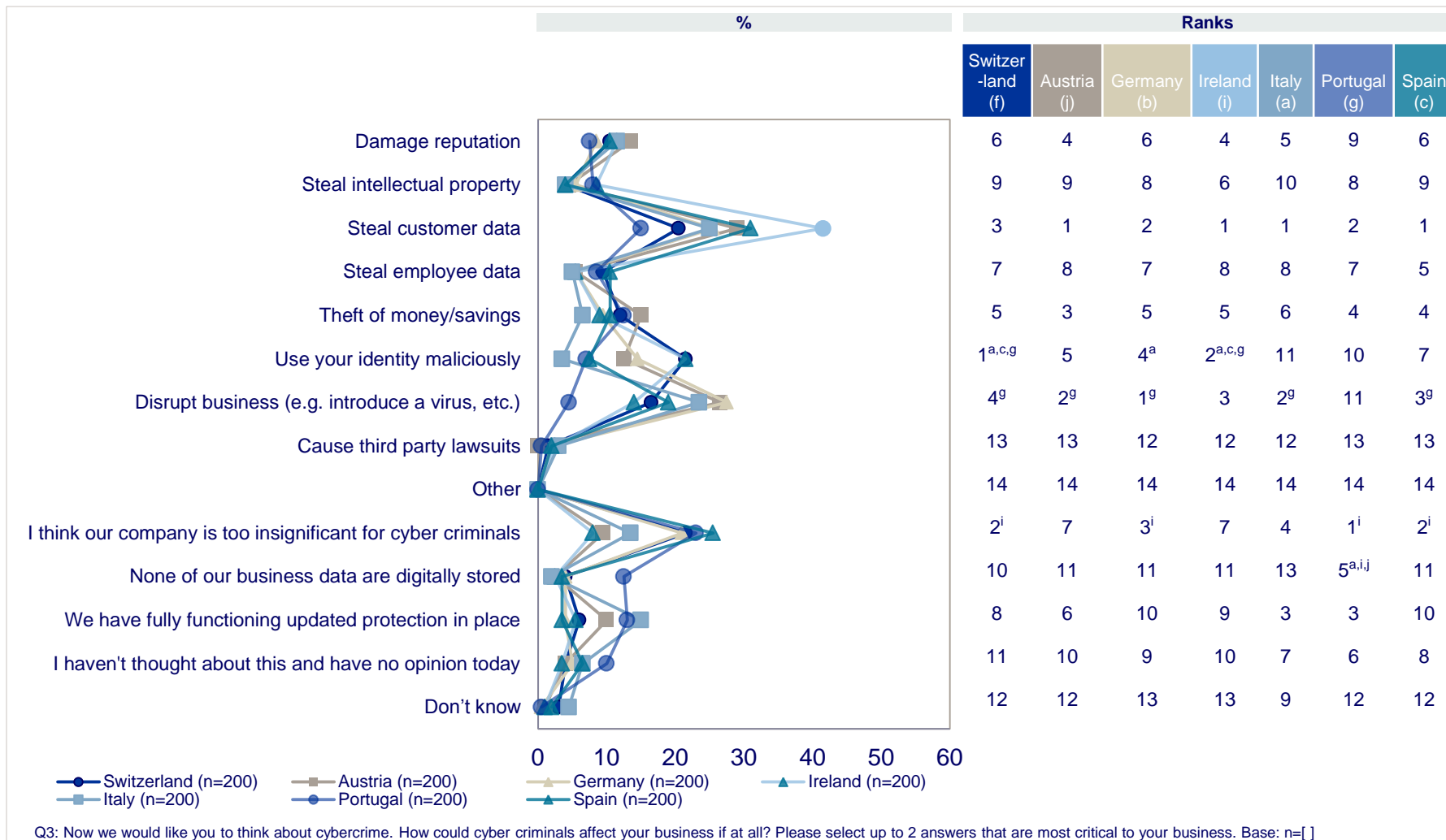


In EUROPE: Relatively consistent response patterns among countries with a few exceptions (e.g. in Switzerland & Ireland)



Potential business impact of cybercrime for SMEs in 2015

Europe / statistics in % and ranks

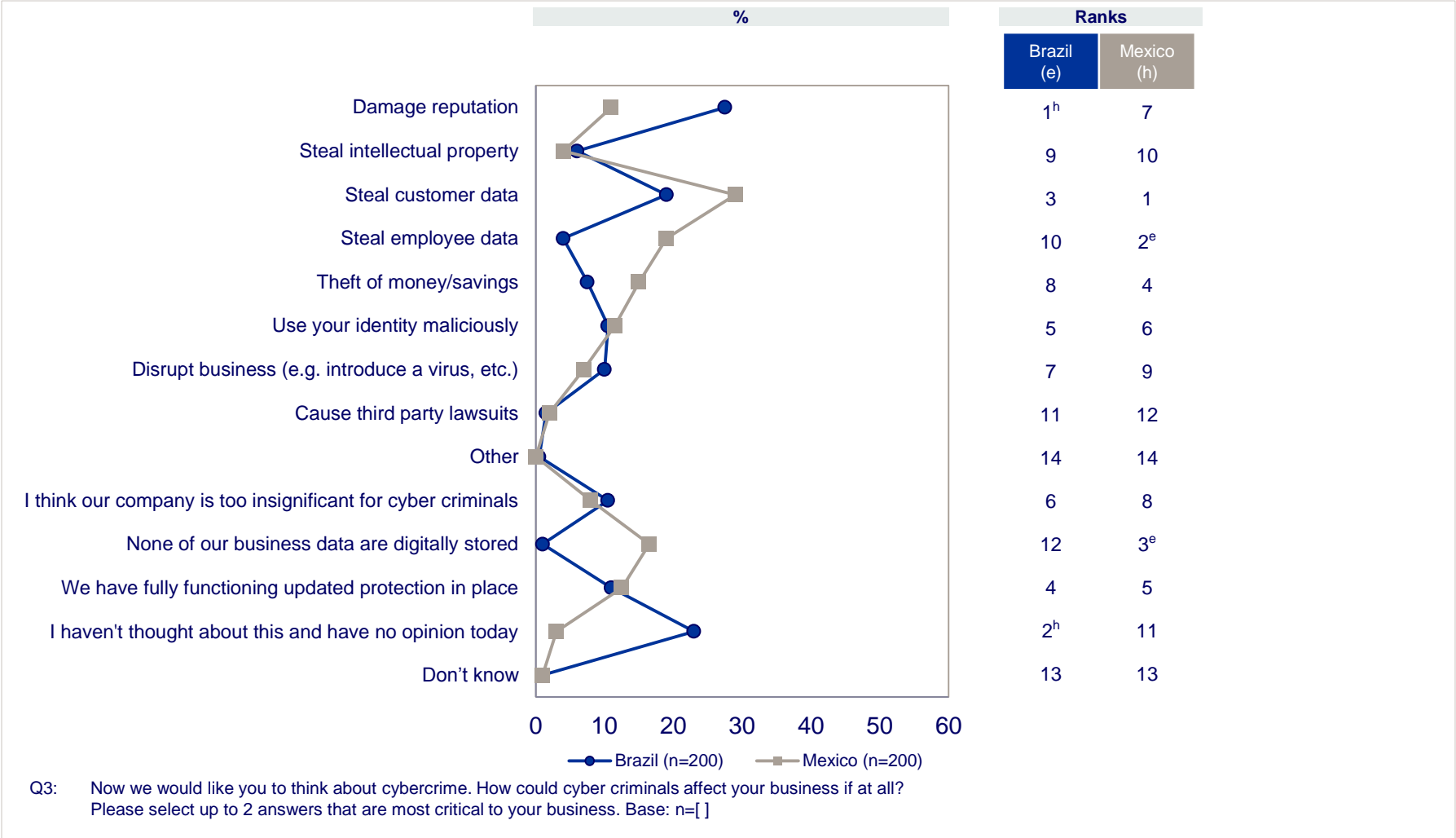


In LATAM: SMEs in Brazil and Mexico identify different business areas that could be affected by cybercrime



Potential business impact of cybercrime for SMEs in 2015

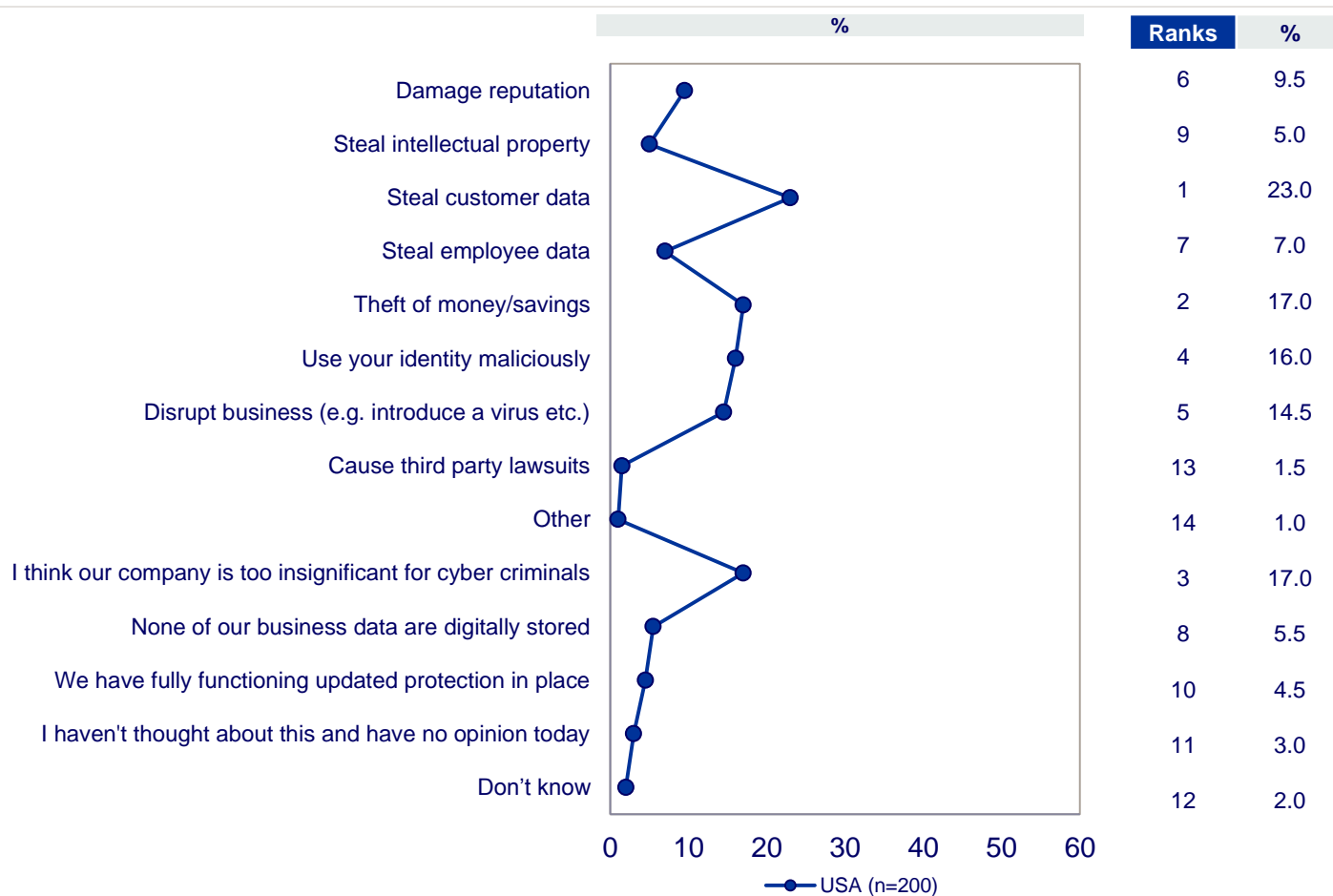
Latin America / statistics in % and ranks



In the USA: SMEs in the USA are least concerned about 'cause third party lawsuits' as a result of cybercrime

Potential business impact of cybercrime for SMEs in 2015

USA / statistics in % and ranks

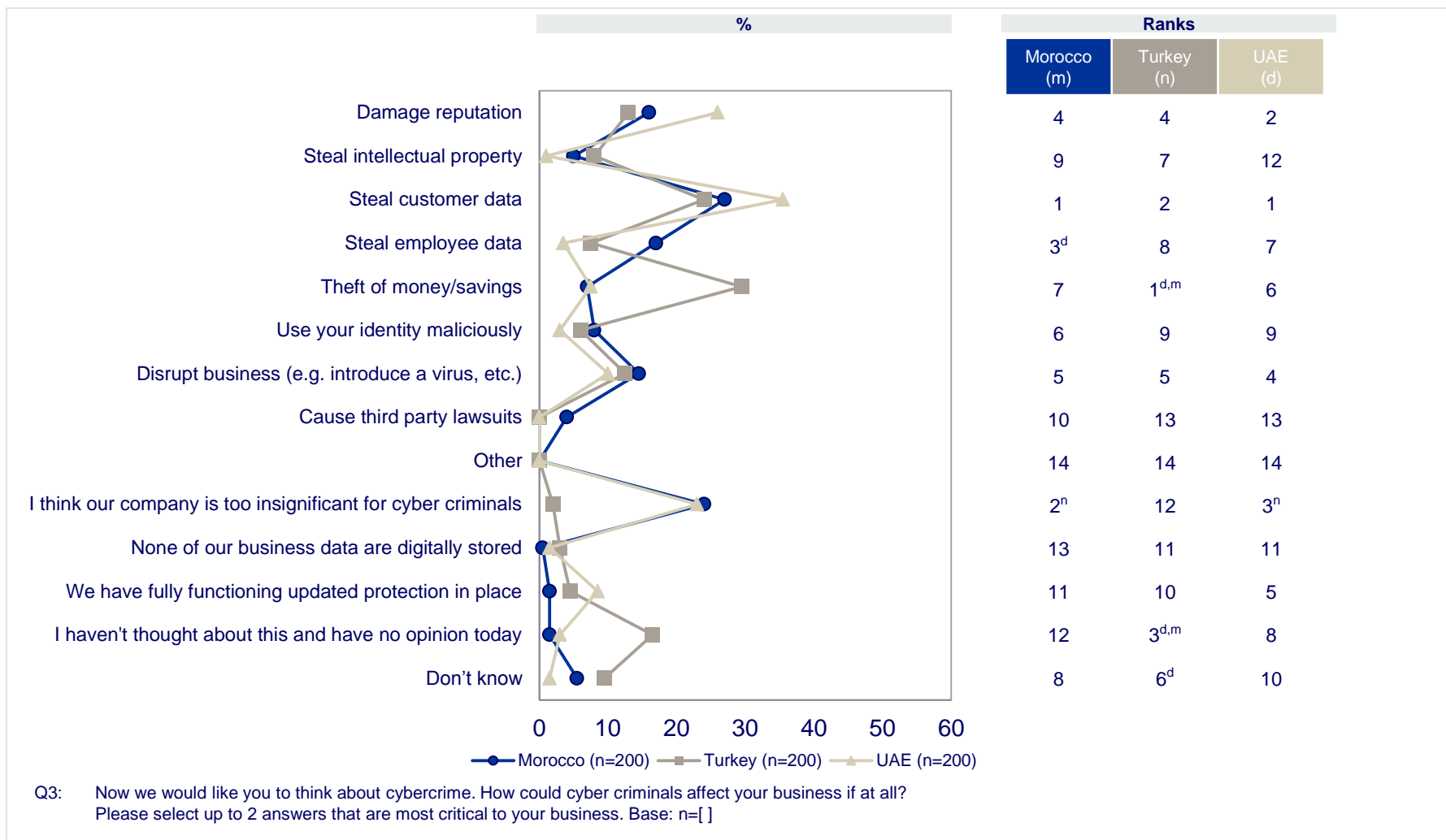


Q3: Now we would like you to think about cybercrime. How could cyber criminals affect your business if at all?
Please select up to 2 answers that are most critical to your business. Base: n=[]

In MEA: 'Theft of money/savings' is perceived as a particular cybercrime threat for SMEs in Turkey

Potential business impact of cybercrime for SMEs in 2015

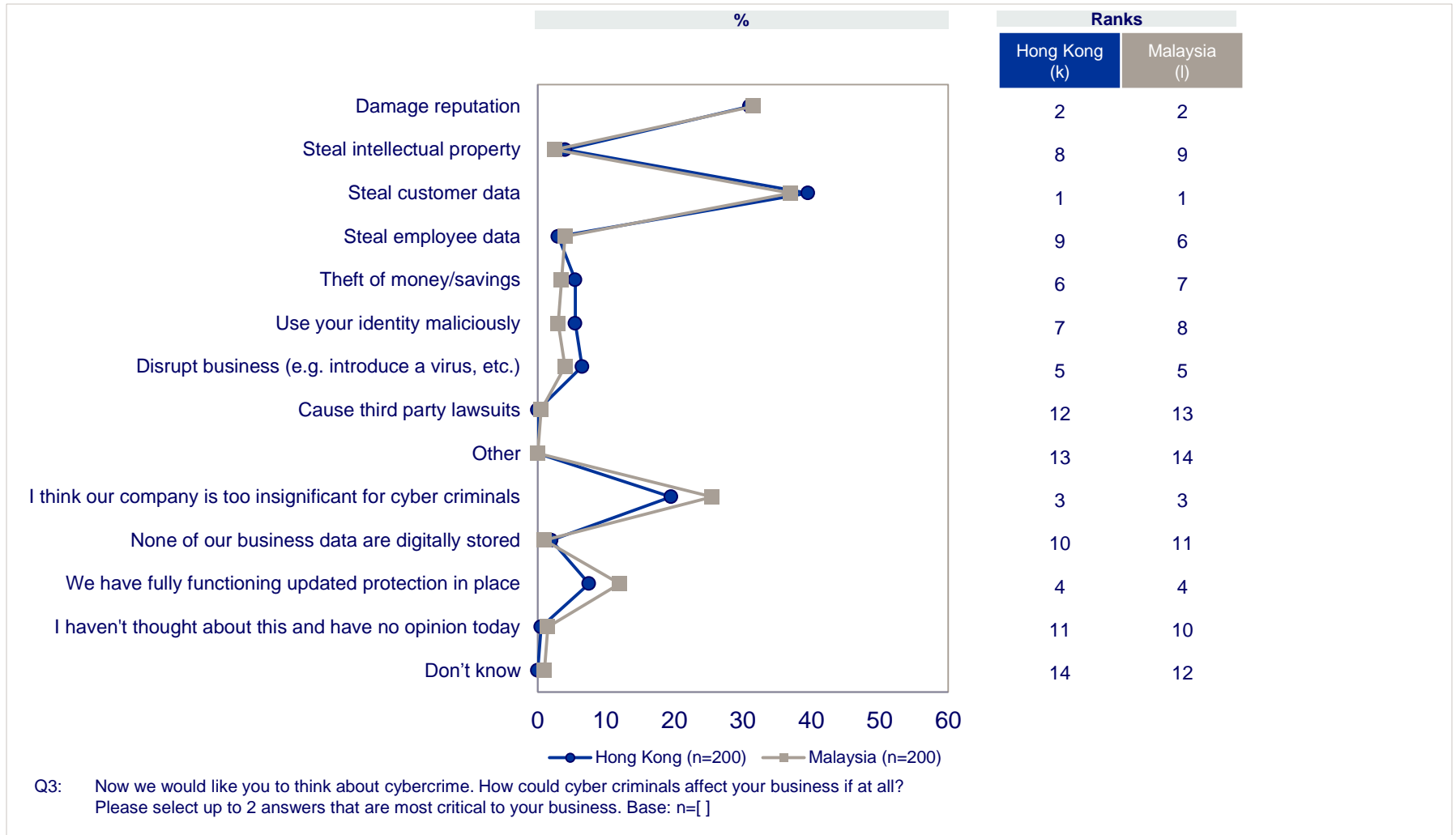
Middle East & Africa / statistics in % and ranks



In APAC: Hong Kong and Malaysian SMEs share equal concerns on all potential cybercrime threats

Potential business impact of cybercrime for SMEs in 2015

APAC / statistics in % and ranks



Results by country

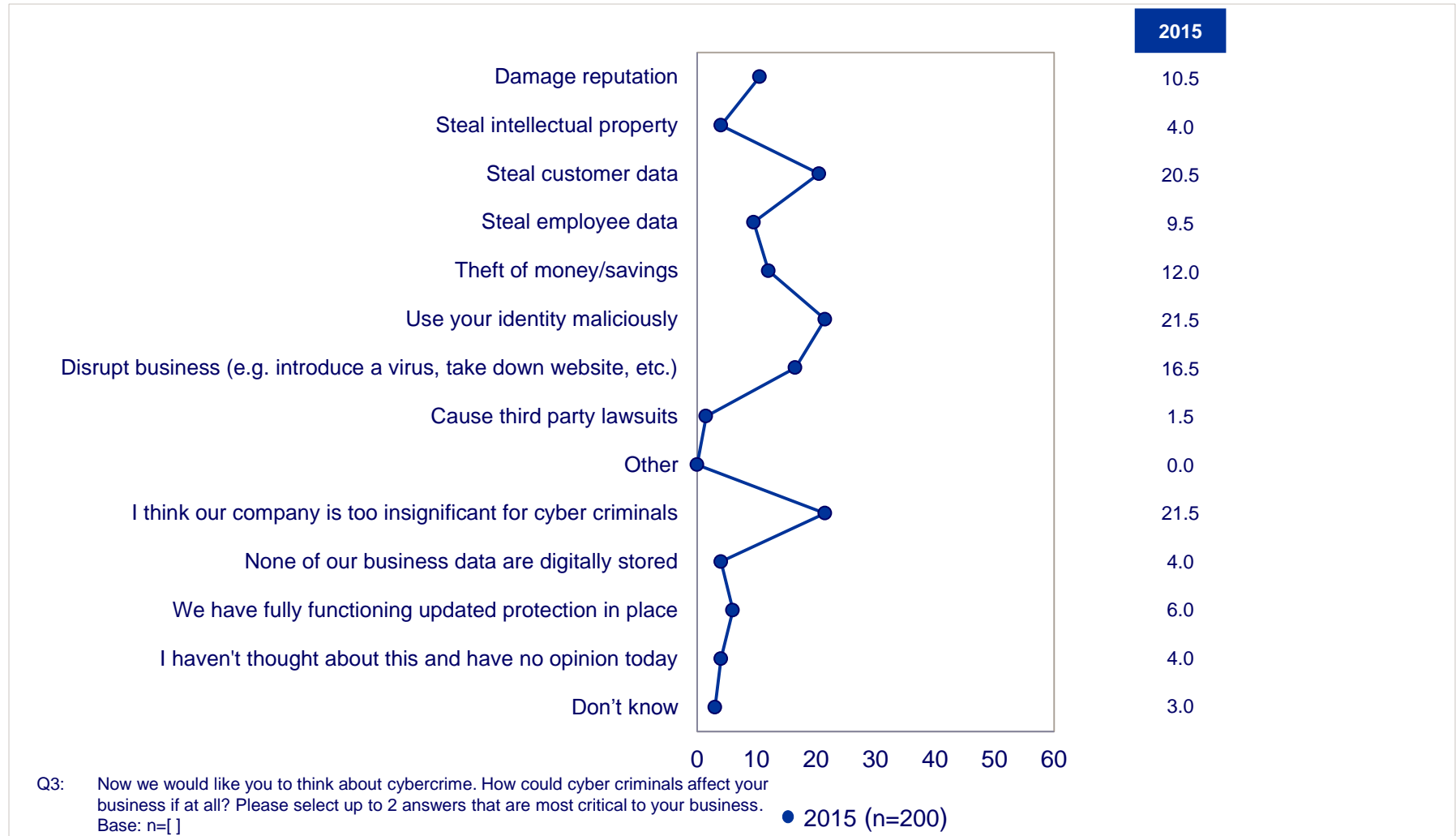
Potential business impact of cybercrime for small and medium enterprises (SMEs) in 2015



While cyber criminals could cause damage in several ways, one in four SMEs perceive this to be too small

Potential business impact of cybercrime for SMEs in 2015

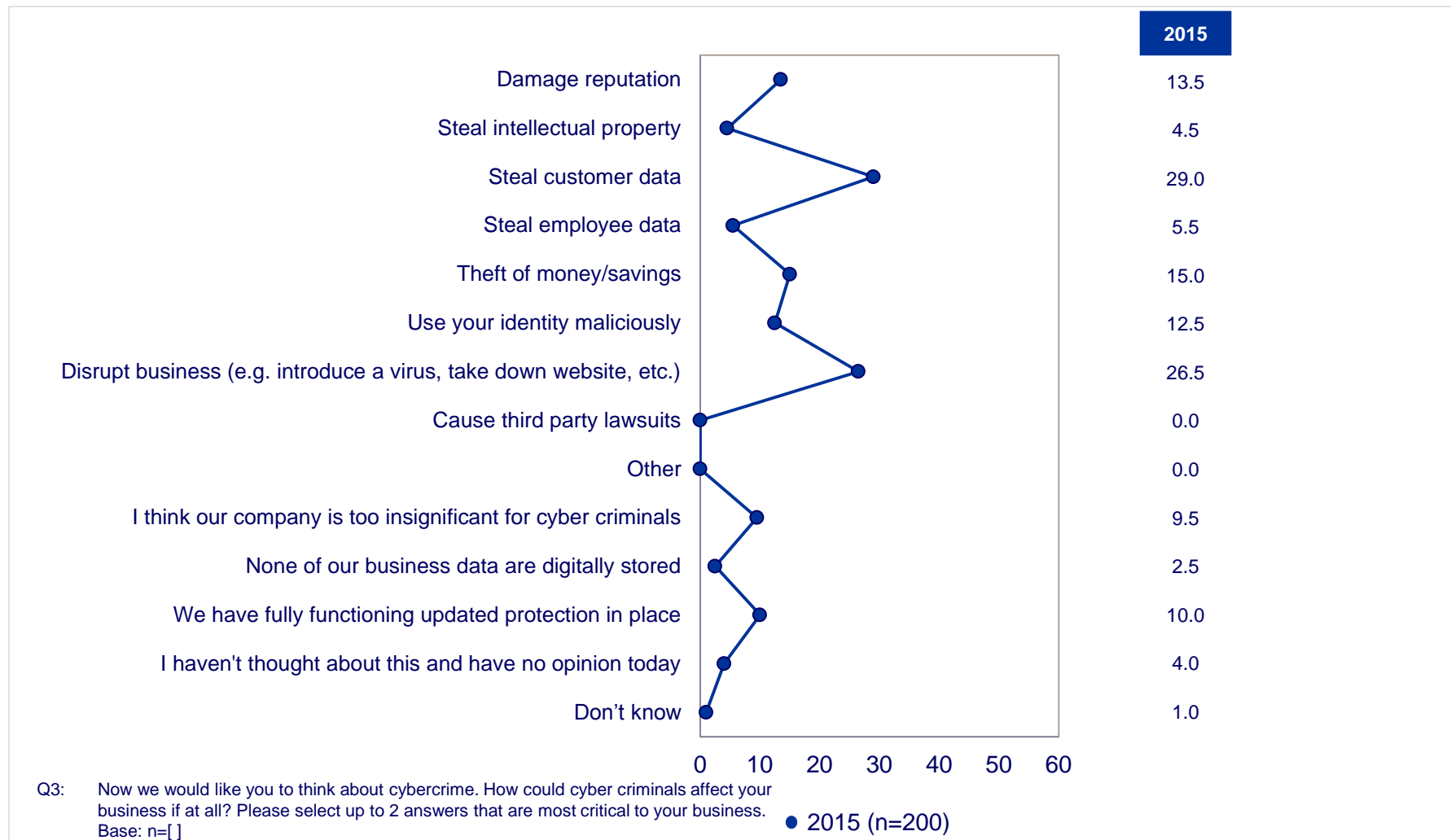
Statistics in %



'Stealing customer data' and 'disrupting business' are the most crucial forms of potential damage caused by cybercrime

Potential business impact of cybercrime for SMEs in 2015

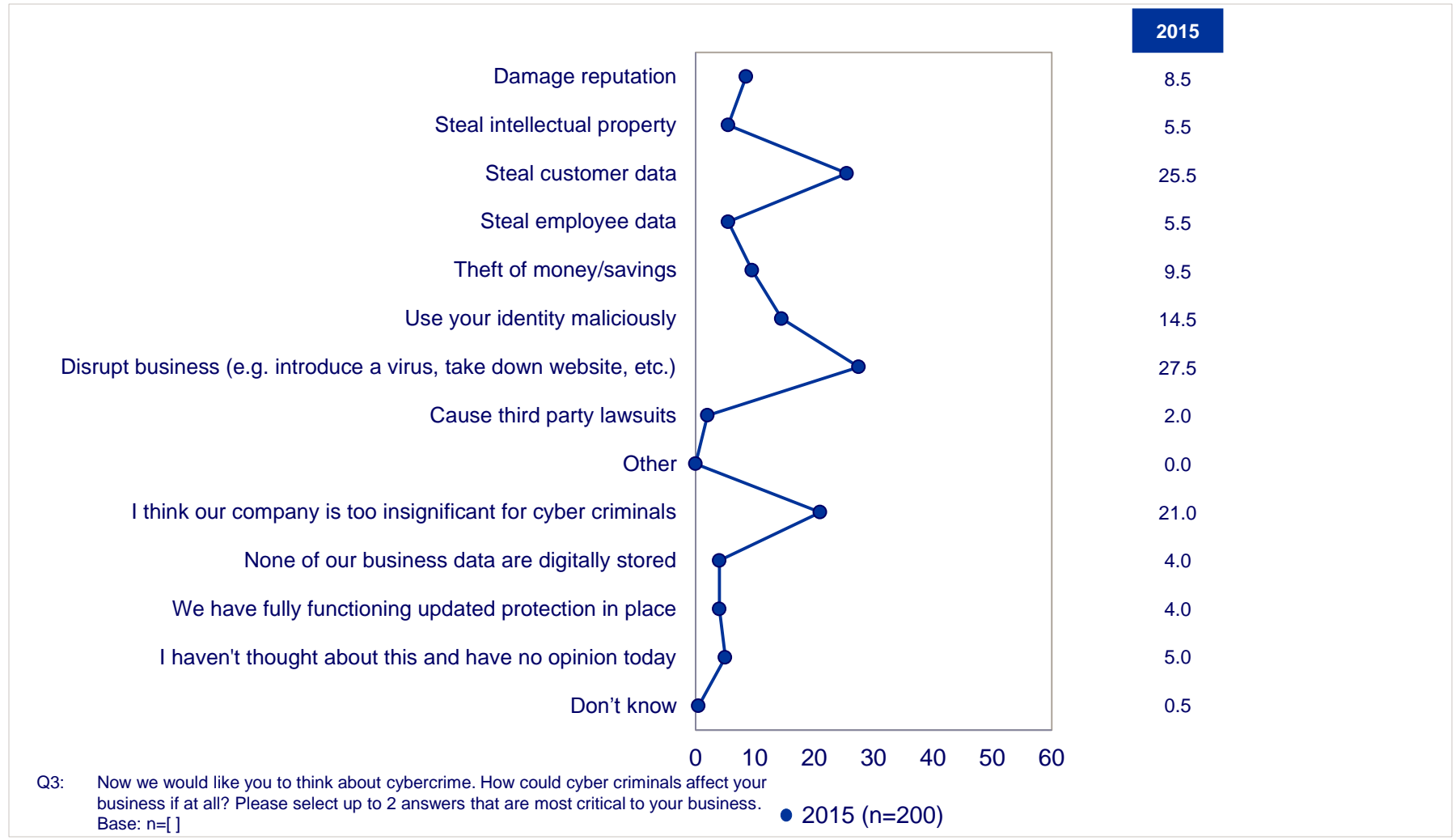
Statistics in %



'Stealing customer data' and 'disrupting business' are the most crucial forms of potential damage caused by cybercrime

Potential business impact of cybercrime for SMEs in 2015

Statistics in %



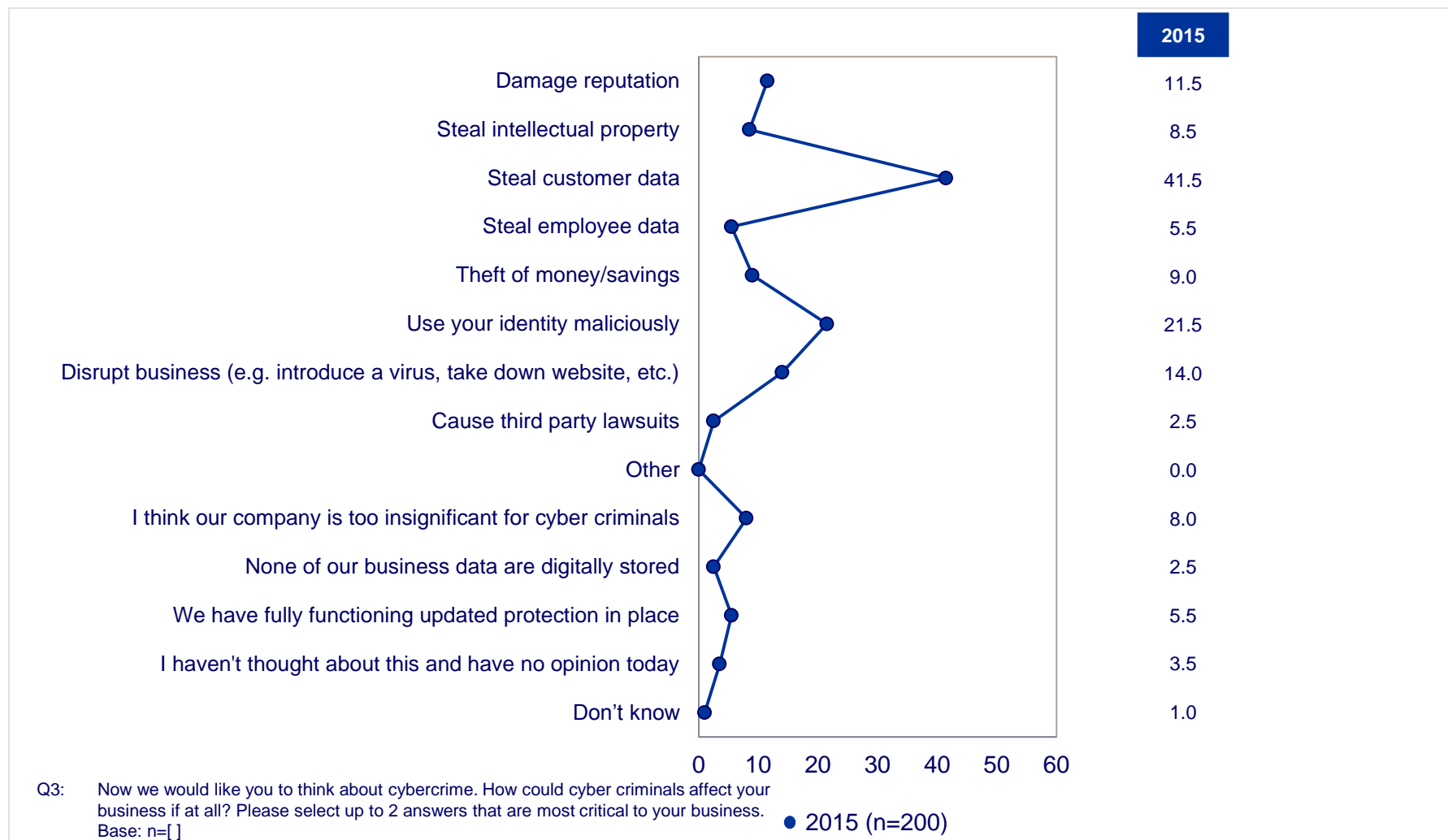
'Theft of customer data' by cyber criminals is the damage that SMEs in Ireland fear the most

Potential business impact of cybercrime for SMEs in 2015

Statistics in %



Ireland



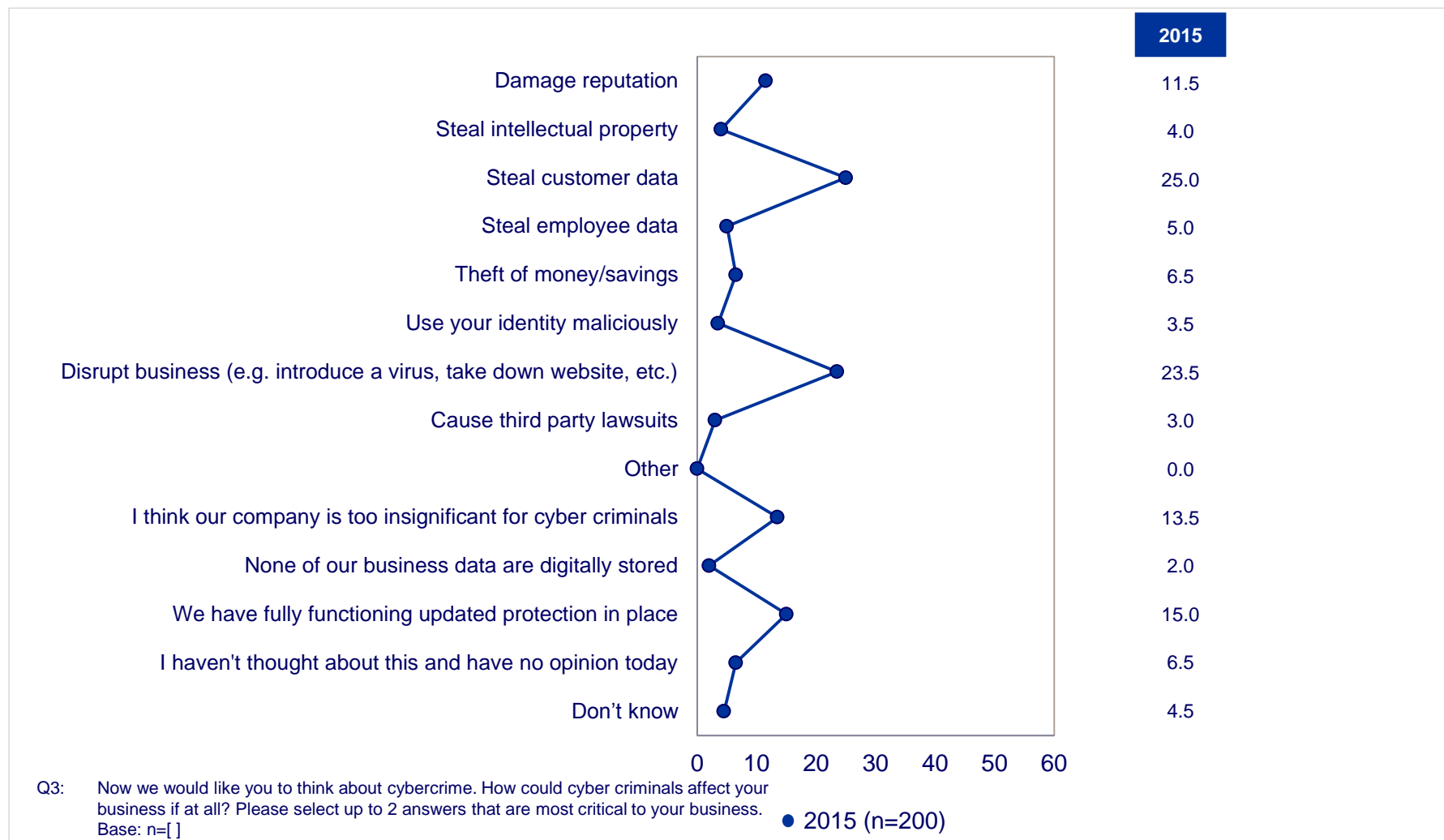
'Steal customer data' and 'disrupt business' are most frequently mentioned cybercrime threats by SMEs in Italy

Potential business impact of cybercrime for SMEs in 2015

Statistics in %



Italy



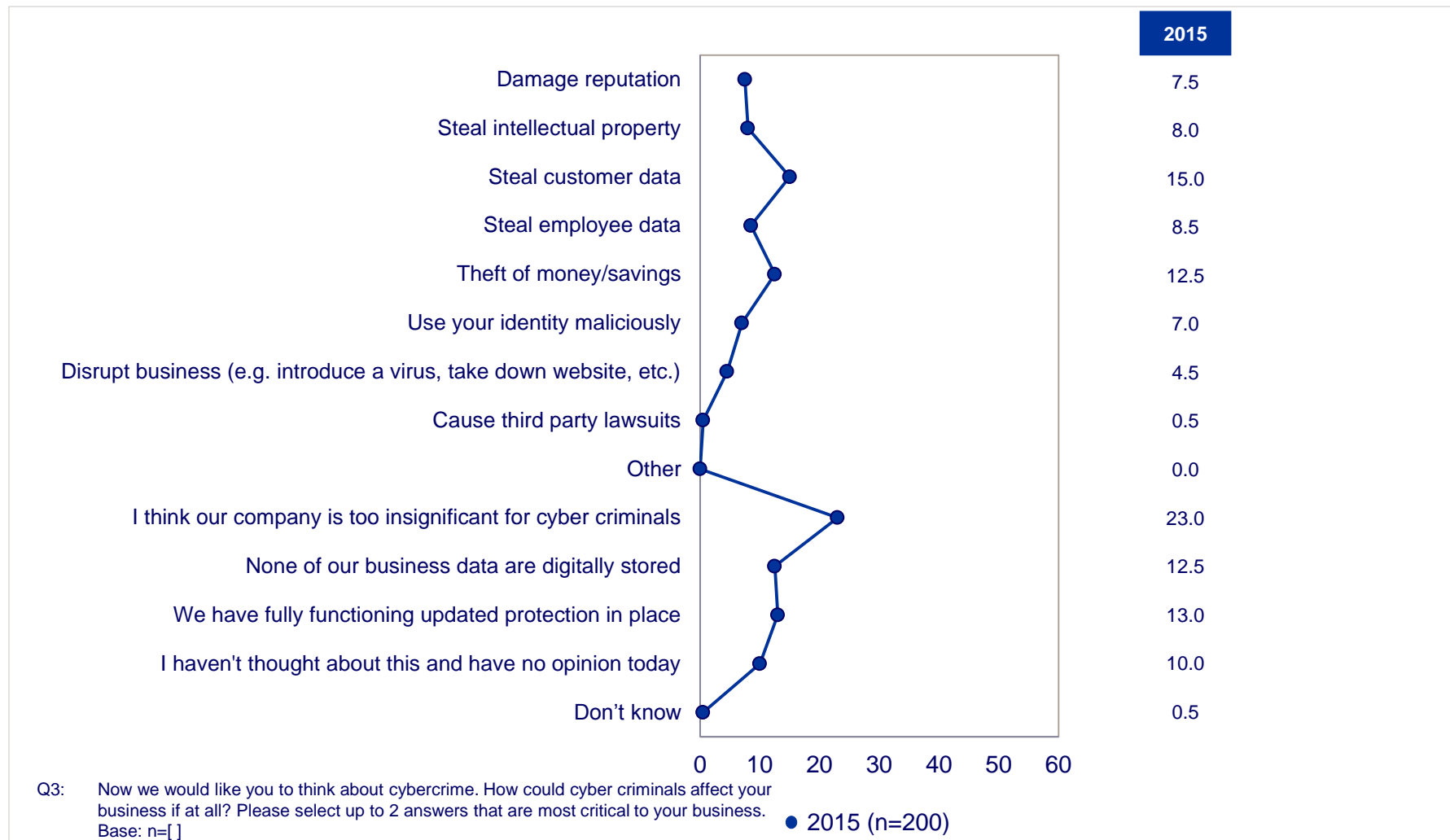
More than half of SMEs in Portugal seem not to be worried about cybercrime (for several reasons)

Potential business impact of cybercrime for SMEs in 2015

Statistics in %



Portugal



'Theft of customer data' by cyber criminals is the damage that SMEs in Spain fear the most

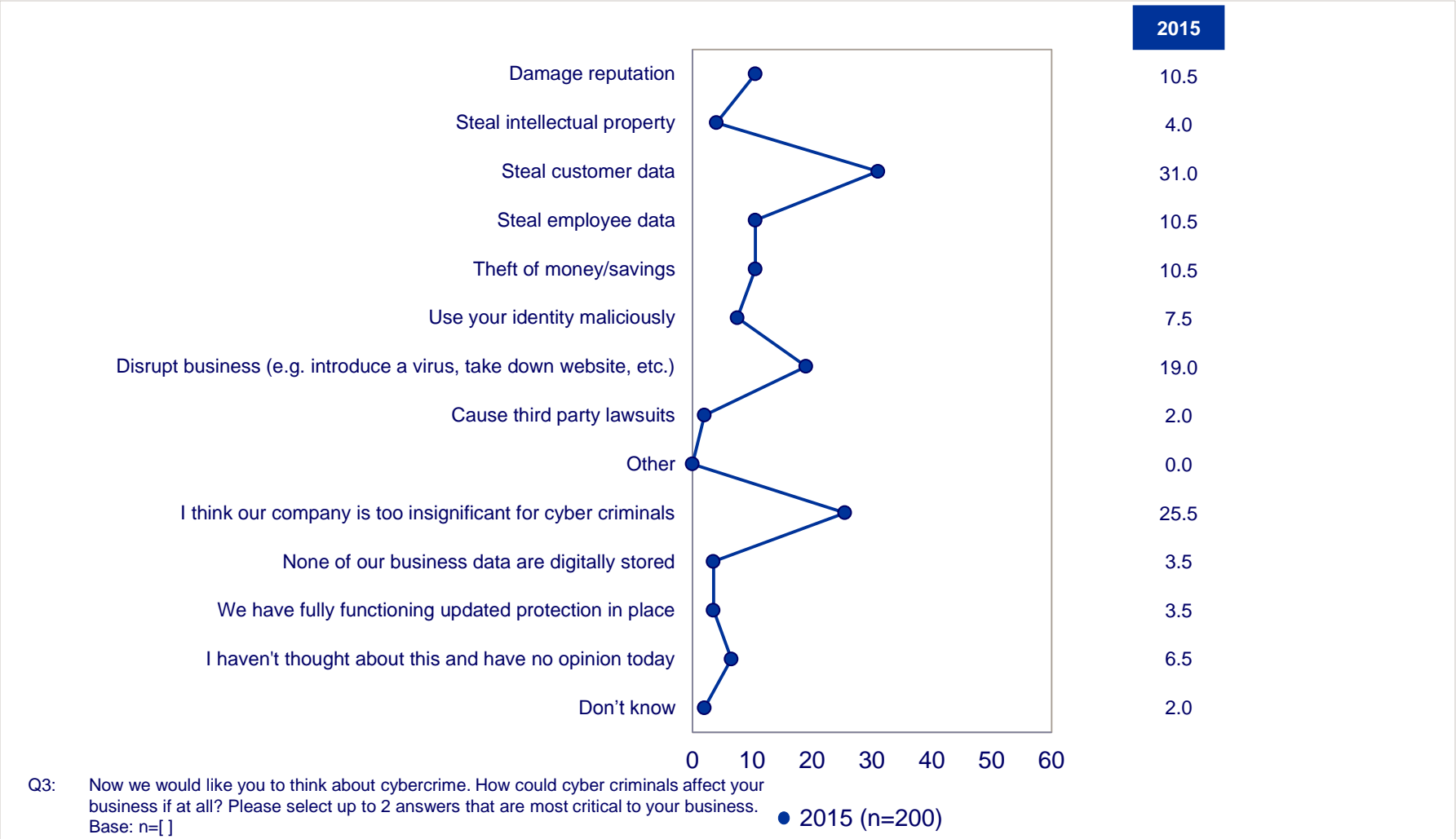


Potential business impact of cybercrime for SMEs in 2015

Statistics in %



Spain



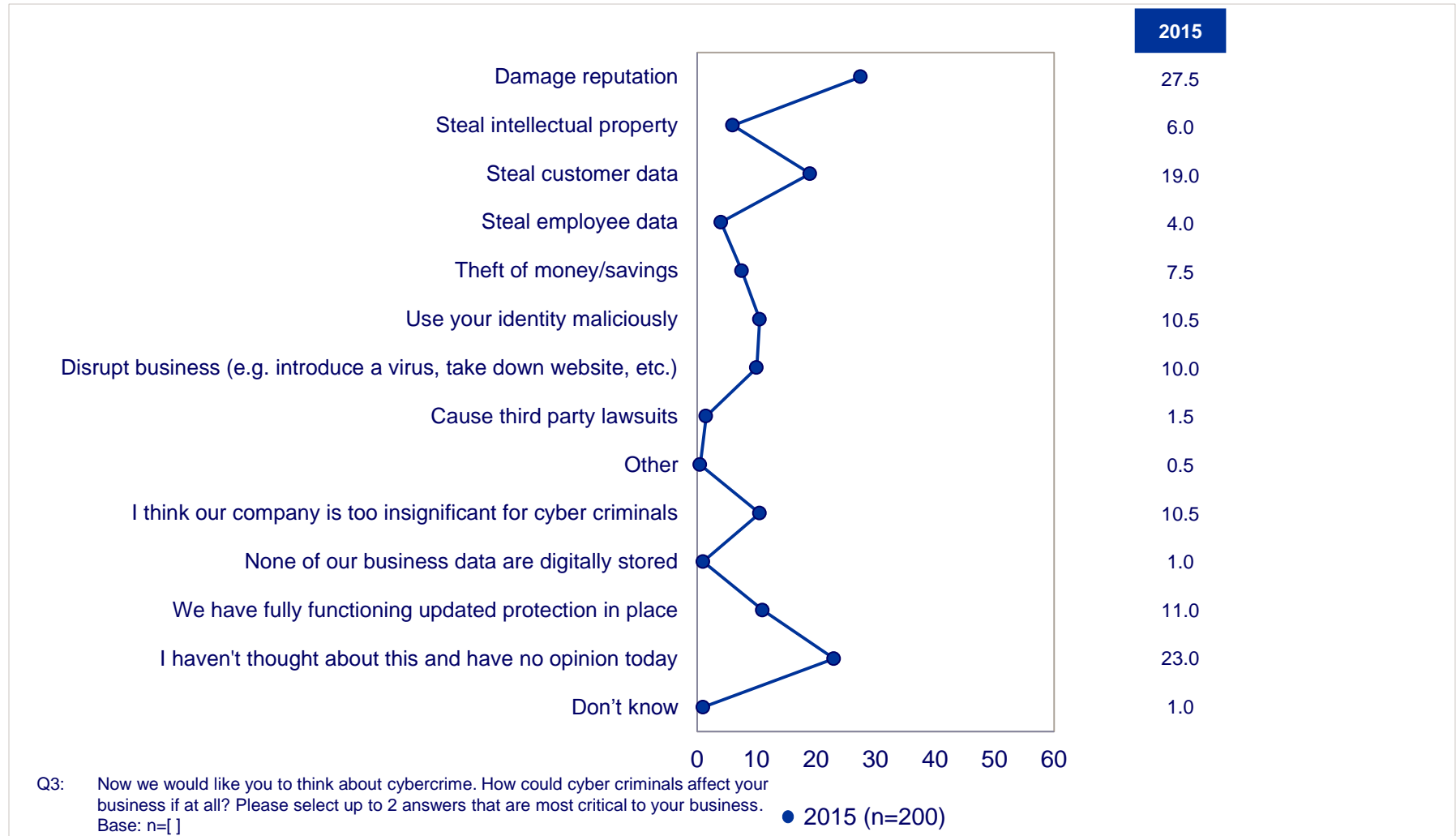
'Reputation' and 'Customer data' are the most important assets to suffer from cybercrime as rated by SMEs in Brazil

Potential business impact of cybercrime for SMEs in 2015

Statistics in %



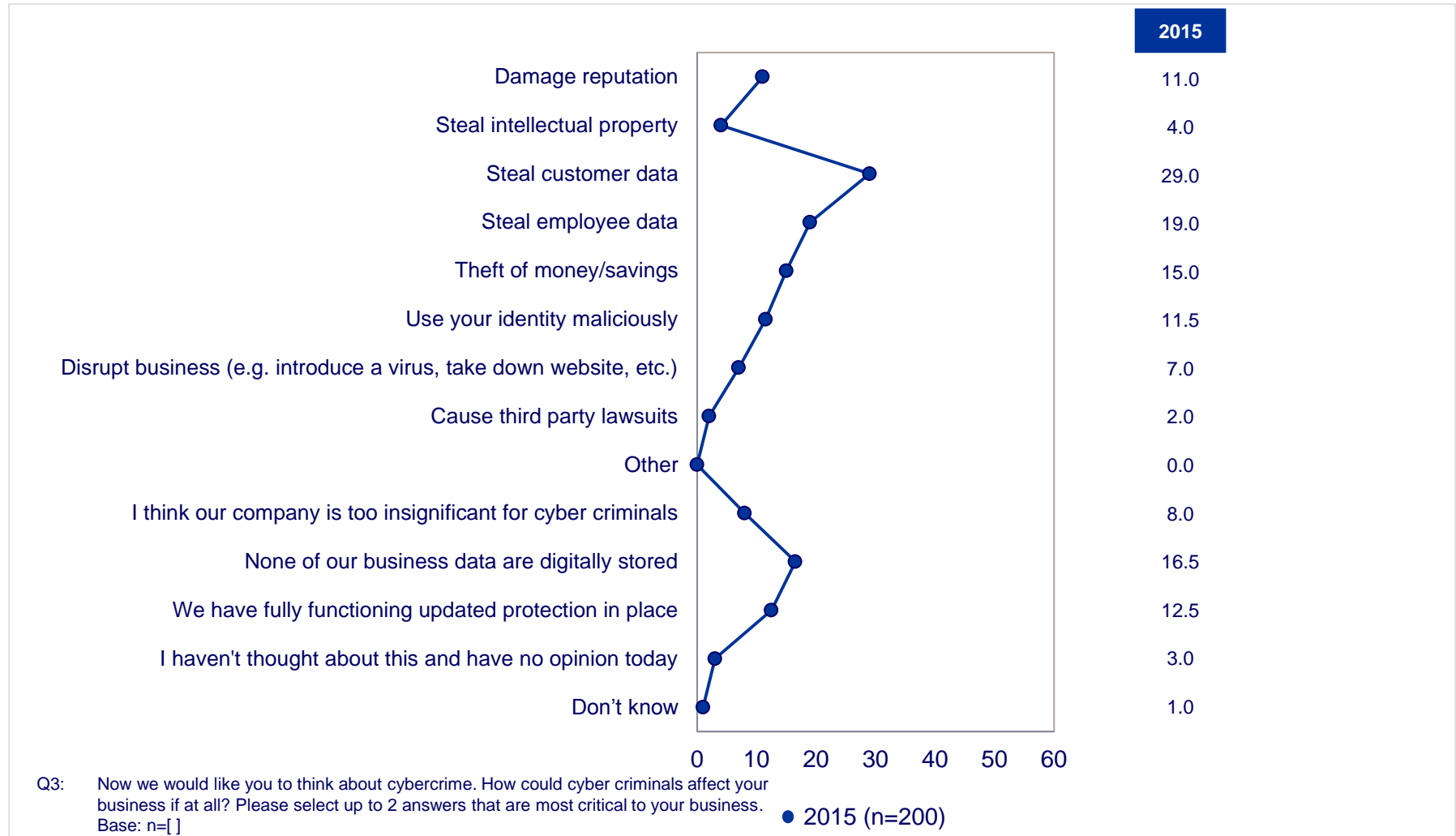
Brazil



The greatest potential cyber threat for SMEs in Mexico is to their customer data

Potential business impact of cybercrime for SMEs in 2015

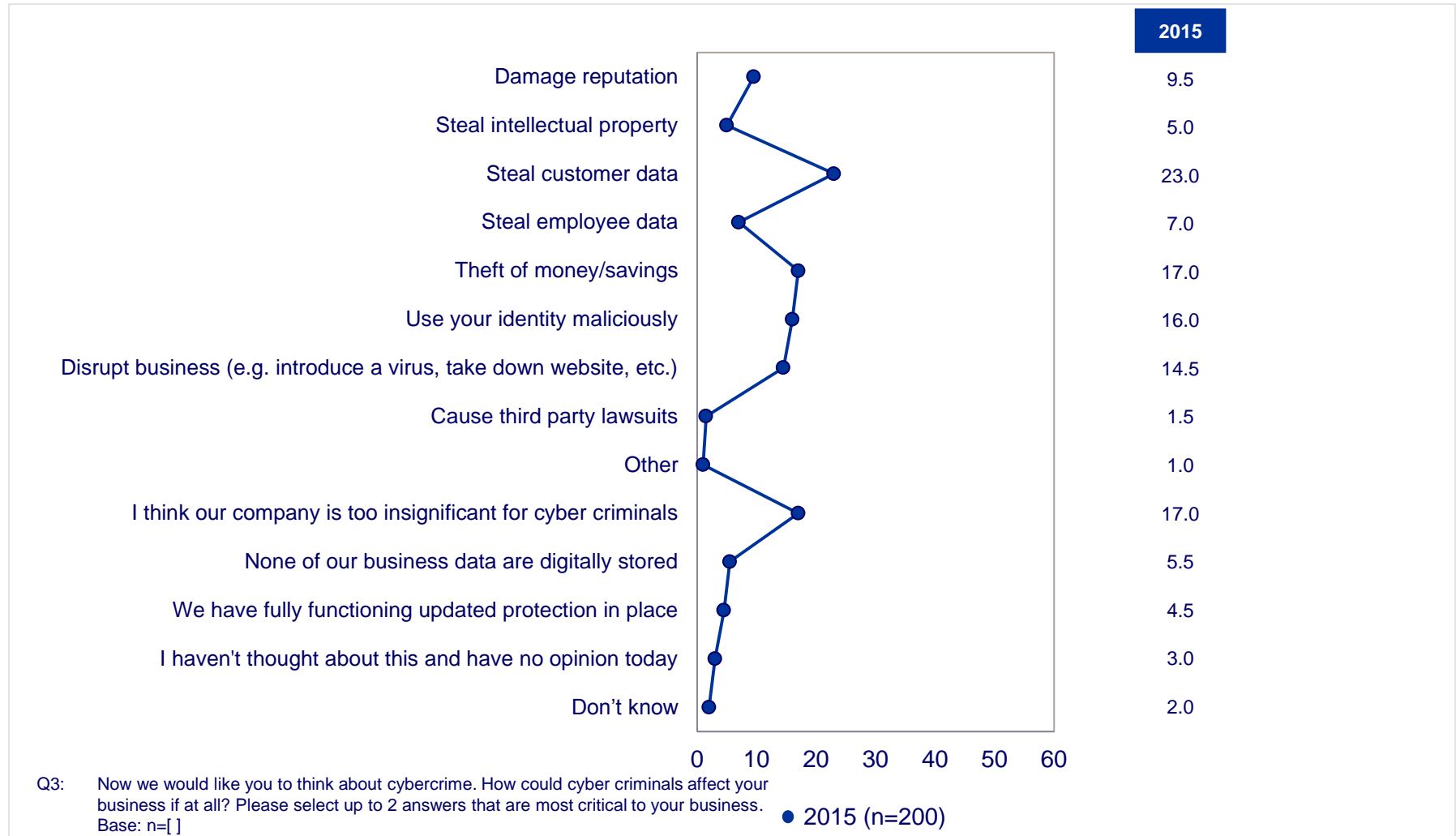
Statistics in %



While cyber criminals could cause damage in several ways, one in six SMEs in the USA is too small for cybercrime

Potential business impact of cybercrime for SMEs in 2015

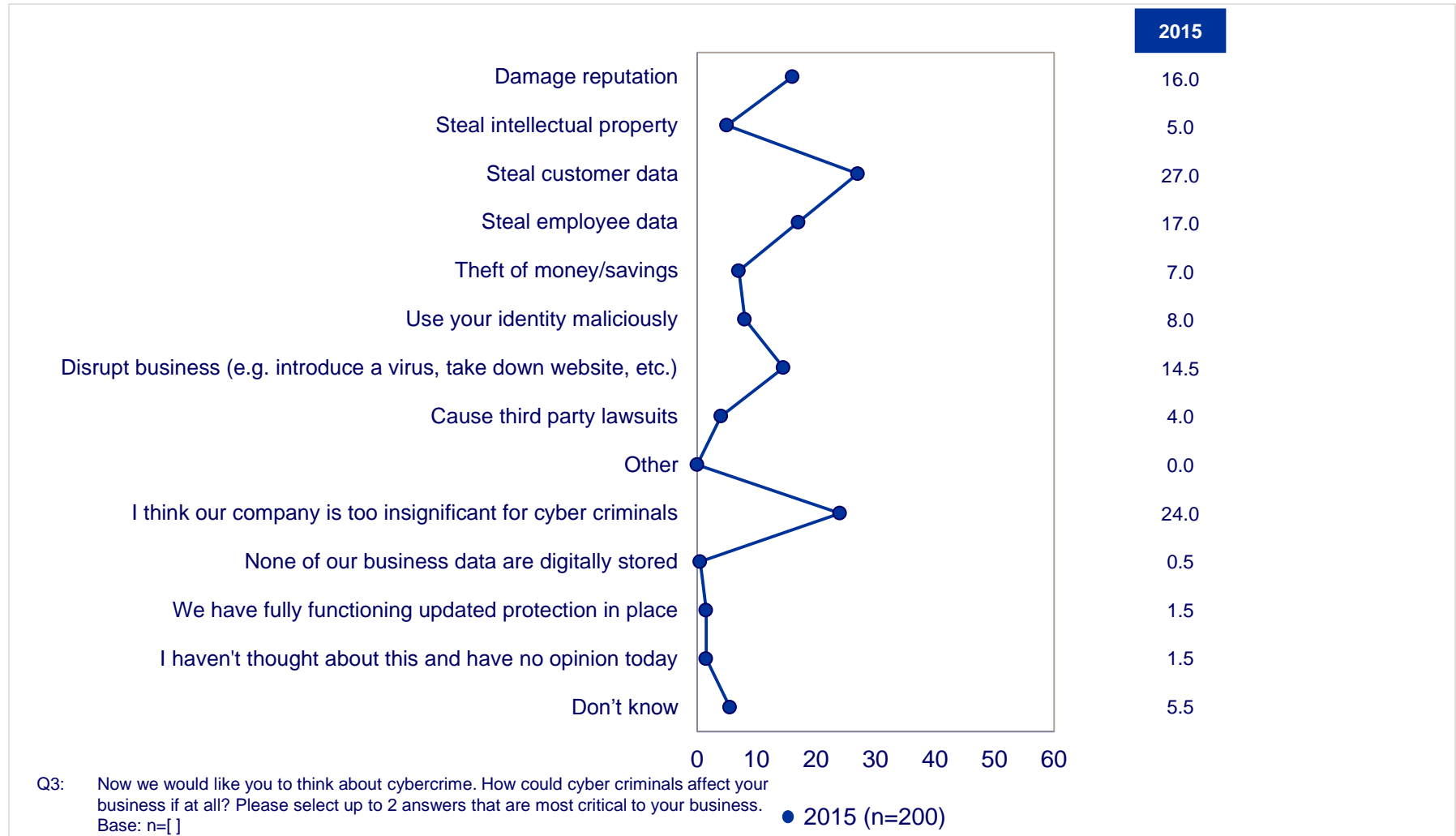
Statistics in %



The greatest potential cyber threat for SMEs in Morocco relates to 'steal customer data'

Potential business impact of cybercrime for SMEs in 2015

Statistics in %



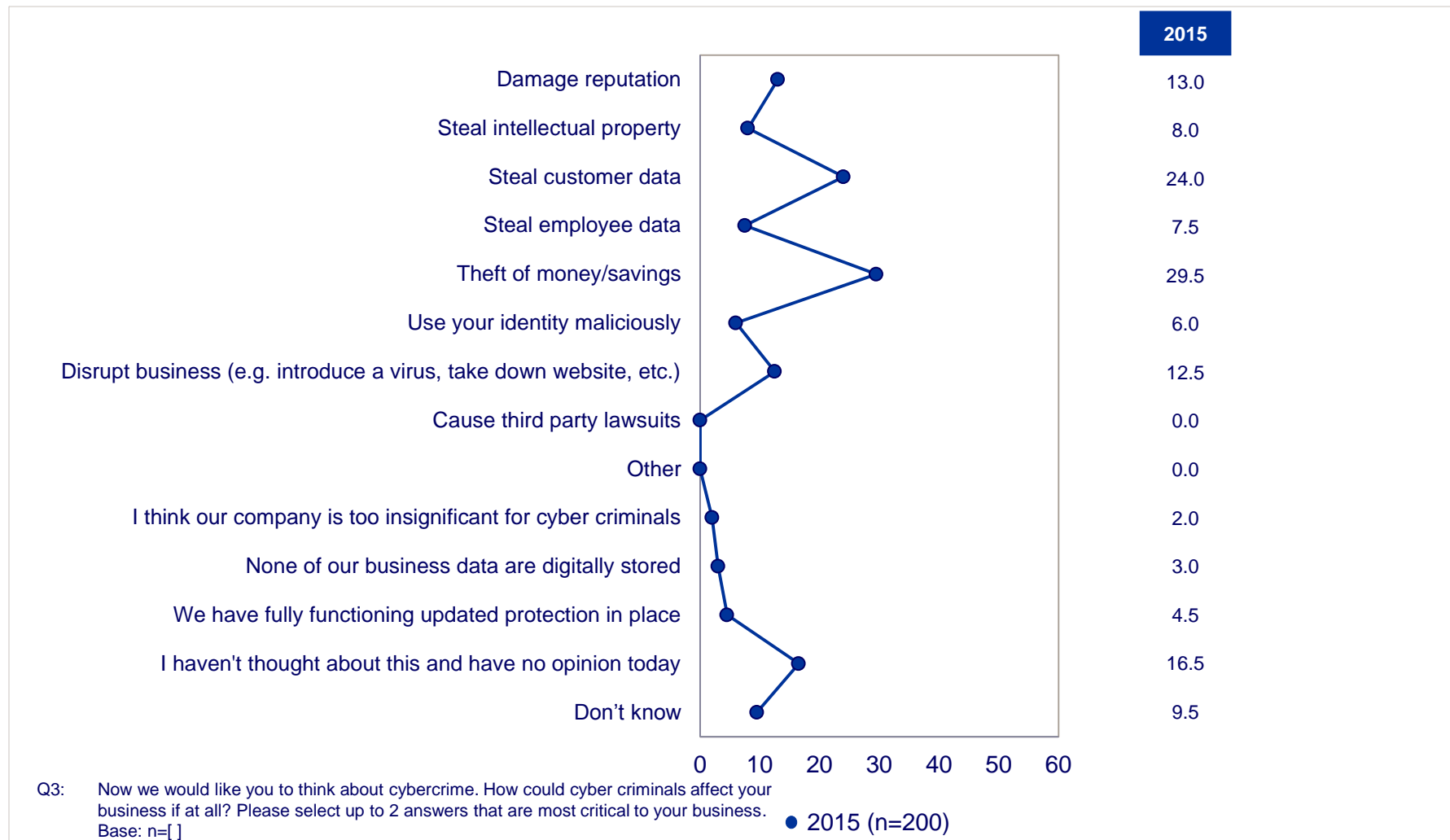
SMEs in Turkey believe 'theft of money/savings' is the greatest risk posed by cyber criminals

Potential business impact of cybercrime for SMEs in 2015

Statistics in %



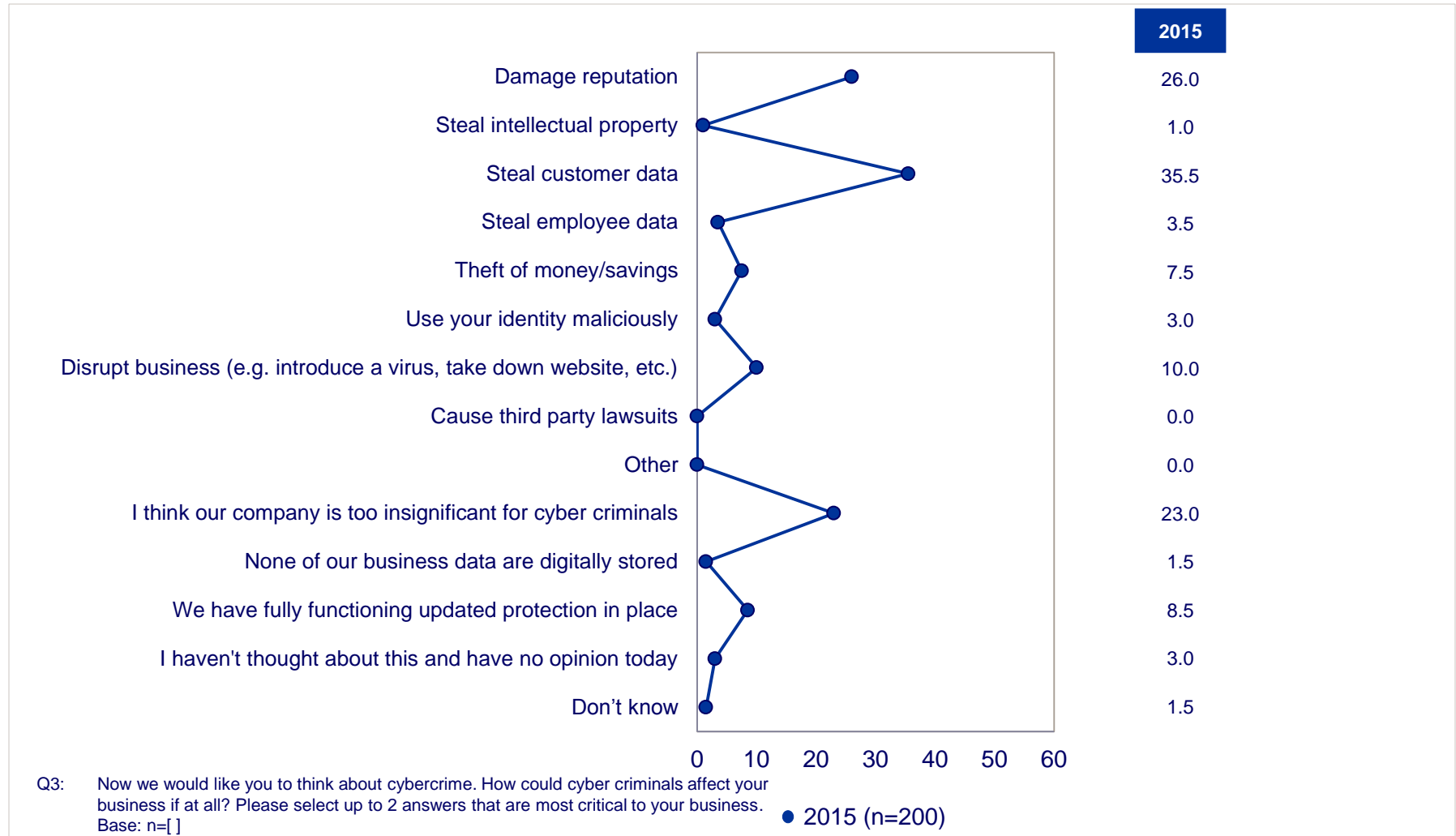
Turkey



'Stealing customer data' is perceived as the most critical cybercrime damage in the UAE

Potential business impact of cybercrime for SMEs in 2015

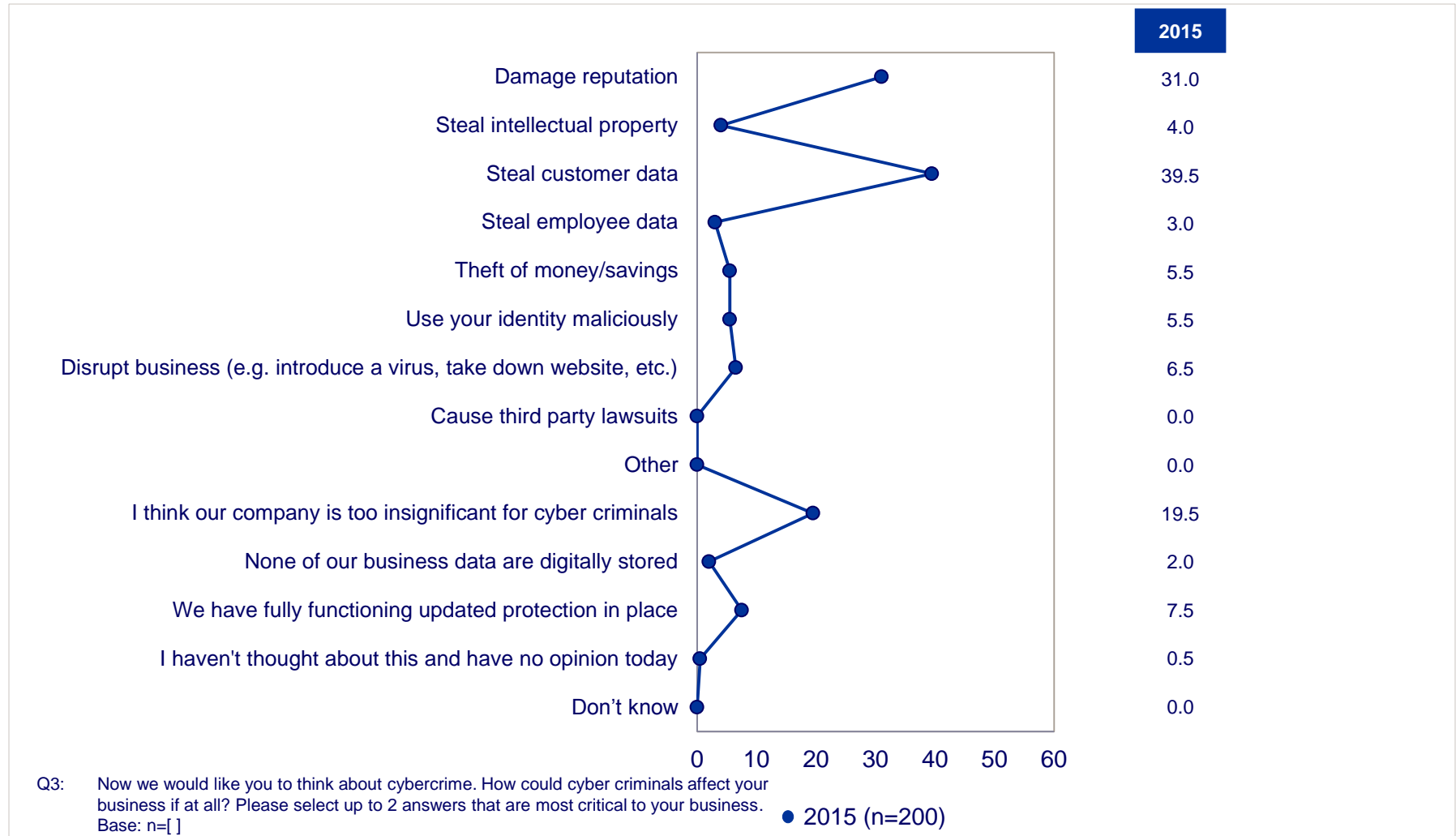
Statistics in %



'Reputation' and 'Customer data' are the most important assets to suffer from cybercrime in Hong Kong

Potential business impact of cybercrime for SMEs in 2015

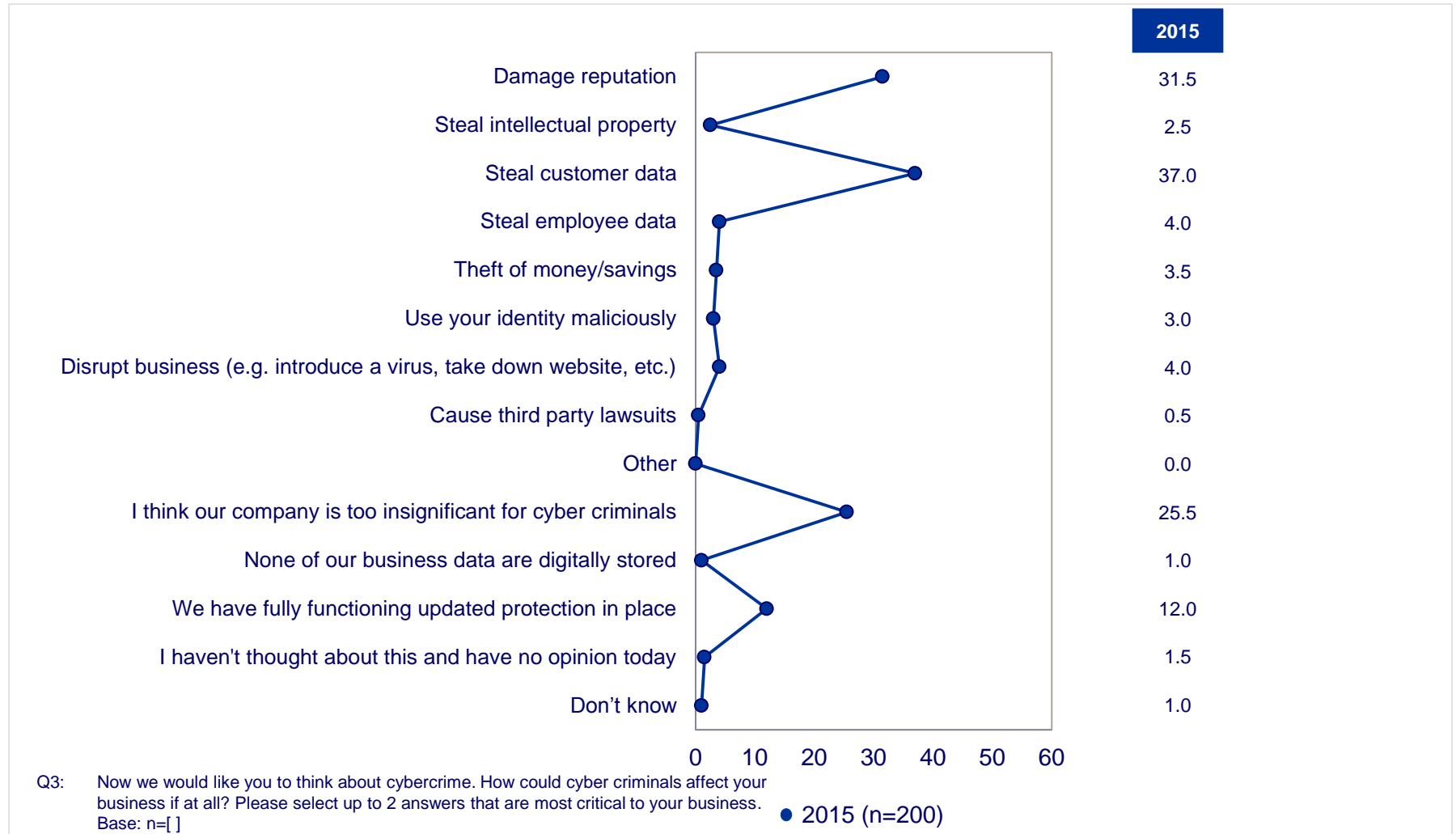
Statistics in %



'Reputation' and 'Customer data' are the most important assets to suffer from cybercrime in Malaysia

Potential business impact of cybercrime for SMEs in 2015

Statistics in %



Appendix: Sample structure

Potential business impact of cybercrime for small and medium enterprises (SMEs) in 2015




Sample structure

Function and full-time employees

Potential business impact of cybercrime for SMEs in 2015

Distribution in % (n=200 per country)







	Europe							Latin America	
									
	CH	Austria	Germany	Ireland	Italy	Portugal	Spain	Brazil	Mexico
Function									
CEO/Owner	45.0	64.5	60.5	41.5	67.0	47.0	42.0	40.5	44.0
CFO/Treasurer	22.5	13.5	15.0	15.5	15.5	12.0	21.0	21.0	15.0
COO/Head of operations	18.5	17.5	15.5	16.0	15.5	14.5	20.0	15.5	27.0
General Manager	14.0	4.5	9.0	27.0	2.0	26.5	17.0	23.0	14.0
Full-time employees									
0 employees	2.5	3.0	1.5	0.5	3.0	0.0	5.0	0.0	0.0
1 to 9 employees	47.5	57.0	28.5	34.5	50.0	50.0	45.0	35.5	31.0
10 to 19 employees	24.0	21.5	29.0	26.0	23.0	19.5	23.5	33.5	20.0
20 to 49 employees	7.5	4.0	11.0	9.0	8.5	11.0	7.0	7.5	10.0
50 to 99 employees	13.5	10.0	23.0	21.5	12.5	13.0	15.0	20.0	27.5
100 to 250 employees	5.0	4.5	7.0	8.5	3.0	6.5	4.5	3.5	11.5

Sample structure

Function and full-time employees

Potential business impact of cybercrime for SMEs in 2015

Distribution in % (n=200 per country)










	North America	Middle East & Africa			APAC	
						
	USA (new 2015)	Morocco	Turkey	UAE	Hong Kong	Malaysia
Function						
CEO/Owner	38.5	59.0	50.0	41.5	46.5	29.5
CFO/Treasurer	10.0	11.5	11.5	14.0	15.5	20.0
COO/Head of operations	9.5	13.0	24.0	15.5	17.5	22.0
General Manager	42.0	16.5	14.5	29.0	20.5	28.5
Full-time employees						
0 employees	2.5	0.0	1.0	0.5	2.0	0.0
1 to 9 employees	33.5	67.5	58.5	48.0	33.5	50.0
10 to 19 employees	26.5	17.5	21.5	24.0	27.5	22.5
20 to 49 employees	12.5	4.0	9.0	7.5	12.0	7.5
50 to 99 employees	11.5	8.5	6.0	11.5	15.5	15.5
100 to 250 employees	13.5	2.5	4.0	8.5	9.5	4.5

Sample structure

Revenue and industry

Potential business impact of cybercrime for SMEs in 2015

Distribution in % (n=200 per country)





	Europe							Latin America	
									
	CH	Austria	Germany	Ireland	Italy	Portugal	Spain	Brazil	Mexico
Revenue									
Up to 2 Million EUR	32.0	57.5	41.0	41.0	48.0	37.0	47.5	28.0	32.5
More than 2 to 5 Million EUR	17.0	12.5	20.0	16.5	13.5	13.5	17.5	21.0	15.5
More than 5 to 10 Million EUR	13.0	7.0	9.5	11.0	9.0	10.0	5.0	7.0	9.0
More than 10 to 50 Million EUR	3.0	4.0	4.5	4.5	3.5	4.0	0.5	0.0	7.5
More than 50 Million EUR	0.5	1.0	2.0	1.5	0.5	0.5	0.0	0.0	0.5
Industry									
Agriculture	2.5	1.5	5.5	4.5	4.5	4.5	9.5	10.5	7.0
Manufacturing and construction	9.5	8.5	13.5	11.5	7.0	8.5	10.5	7.0	12.0
Wholesale and retail trade	15.0	13.0	14.5	12.5	8.0	9.0	11.0	18.5	17.0
Information and communication	7.0	9.0	8.5	6.5	5.0	3.0	4.0	7.0	4.0
Financial activities (including insurance)	4.0	9.5	13.0	8.0	13.5	6.0	4.0	2.5	3.5
Administrative and support service	6.0	6.0	3.5	4.5	2.5	3.0	4.0	2.0	4.0
Public administration	5.5	4.5	3.5	2.0	3.5	1.0	4.0	2.0	2.5
Transport and storage	7.5	4.5	5.0	7.0	3.0	14.5	5.0	10.0	5.0
Accommodation and food service	9.5	26.5	9.5	18.5	24.0	17.5	12.0	16.0	24.5
Consumer services	22.5	8.5	7.0	15.5	15.0	8.0	24.0	12.0	16.5
Other service activities	11.0	8.5	16.5	9.5	14.0	25.0	12.0	12.5	4.0

Sample structure

Revenue and industry

Potential business impact of cybercrime for SMEs in 2015

Distribution in % (n=200 per country)

	North America	Middle East & Africa			APAC	
						
	USA (new 2015)	Morocco	Turkey	UAE	Hong Kong	Malaysia
Revenue						
Up to 2 Million EUR	29.0	46.5	54.5	40.5	32.5	33.5
More than 2 to 5 Million EUR	11.0	9.5	5.5	15.5	25.5	22.0
More than 5 to 10 Million EUR	6.0	11.5	7.5	7.0	6.5	7.0
More than 10 to 50 Million EUR	7.5	2.0	2.0	6.0	2.5	2.0
More than 50 Million EUR	1.5	0.5	1.0	0.0	2.0	0.5
Industry						
Agriculture	3.0	1.0	3.5	2.5	0.0	2.5
Manufacturing and construction	18.0	18.0	10.5	4.0	10.5	6.0
Wholesale and retail trade	20.5	14.5	13.5	16.0	6.0	17.0
Information and communication	8.0	21.5	15.5	5.0	3.0	2.0
Financial activities (including insurance)	12.5	8.5	7.5	8.5	21.5	12.0
Administrative and support service	2.0	4.0	2.5	5.5	8.0	5.0
Public administration	2.0	2.5	2.0	2.5	10.5	4.5
Transport and storage	9.5	13.0	17.5	13.0	7.5	11.0
Accommodation and food service	10.5	8.5	21.0	27.0	9.5	21.0
Consumer services	5.0	5.0	3.0	12.0	1.5	7.0
Other service activities	9.0	3.5	3.5	4.0	22.0	12.0