香港互聯網註冊管理有限公司
Adoption and Cyber Security on Remote Working in Hong Kong

Market research result
2020
Background

- To explore the market prospect of remote working development in Hong Kong and its close relationship with cybersecurity, HKIRC initiated the “Adoption and Cyber Security on Remote Working in Hong Kong” survey.
- The survey covers two parts – Corporate survey and Individual Survey to understand both employer and employee point of views toward the new remote working development.
- Data collection during Mid Aug - Mid Sep

“Adoption and Cyber Security on Remote Working in Hong Kong” Survey

- Corporate Survey
  - 825 responses covers both SMEs and Large Enterprises
- Individual Survey
  - 924 responses covers HK citizens aged 18 or above
Corporate survey
Corporate survey

- Size of company
- Industry
Corporate survey – Adoption of Remote Working

Adoption of Remote Working

- Yes
- Never Tried

- Company's business nature is not appropriate to work remotely
- Lack of remote working culture
- Company is lack of relevant resources and support
- Data breaches concern
- Lack of remote training provided to staff
## Corporate survey – Adoption of Remote Working

<table>
<thead>
<tr>
<th>Sector</th>
<th>Past 6 months</th>
<th>1 year ago</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodation and catering services</td>
<td>20%</td>
<td>10%</td>
</tr>
<tr>
<td>Retail</td>
<td>40%</td>
<td>30%</td>
</tr>
<tr>
<td>NGOs and others</td>
<td>50%</td>
<td>40%</td>
</tr>
<tr>
<td>Logistics and transportation</td>
<td>60%</td>
<td>50%</td>
</tr>
<tr>
<td>Financial service and professional bodies</td>
<td>70%</td>
<td>60%</td>
</tr>
<tr>
<td>Manufacturing/ I&amp;E</td>
<td>80%</td>
<td>70%</td>
</tr>
<tr>
<td>Training and education</td>
<td>90%</td>
<td>80%</td>
</tr>
<tr>
<td>Information technology</td>
<td>100%</td>
<td>90%</td>
</tr>
</tbody>
</table>

**Past 6 months**

- **Total**: 90%
- **SMEs**: 80%
- **Large Enterprises**: 100%

**1 year ago**

- **Total**: 60%
- **SMEs**: 50%
- **Large Enterprises**: 90%
Corporate survey – Concerns of Remote Working

Top Concerns During Adoption of Remote Working

- More exposed to cyber risk: 35%
- Data breaches: 30%
- Distraction among staff: 25%
- Lack of IT support: 20%
- Employees become disconnected: 15%
- Lack of proper tools: 10%
- Other: 5%
- None: 0%
Corporate survey – Support Provision

Make additional investment to facilitate remote working in the past 6 months:

- **Large Enterprises**
  - Yes: 50%
  - No: 50%

- **SMEs**
  - Yes: 50%
  - No: 50%

Area of Investment:

- Hardware
  - SMEs: 50%
  - Large Enterprises: 50%

- Remote tools/software
  - SMEs: 50%
  - Large Enterprises: 50%

- Cloud software
  - SMEs: 50%
  - Large Enterprises: 50%

- Security software
  - SMEs: 0%
  - Large Enterprises: 0%

- Network Security
  - SMEs: 0%
  - Large Enterprises: 0%

Investment Amount:

- < 50K
  - SMEs: 50%
  - Large Enterprises: 50%

- 50-100K
  - SMEs: 50%
  - Large Enterprises: 50%

- 100-200K
  - SMEs: 0%
  - Large Enterprises: 0%

- 200-500K
  - SMEs: 0%
  - Large Enterprises: 0%

- > 500K
  - SMEs: 0%
  - Large Enterprises: 0%
Corporate survey – Support of Remote Working

Provided Company’s Computer for Remote Working

- SMEs: 60%
- Large Enterprises: 80%

Provided remote working procedures/ guidelines/ best practices for staff to follow

- SMEs: 40%
- Large Enterprises: 80%
Corporate survey – Cybersecurity Awareness

Did your company disseminate any cybersecurity information/news/alert to staff in the past 6 months?

SMEs
- Passive

Large Enterprises
- Active

Channel to Collect Such Information/News/Alert

Active channels:
- Industry Associations
- Online Search
- Seminar & Webinar

Passive channels:
- Media
- Peer
02 Individual survey
Individual survey – Profile

Occupation

- Employers: 22%
- Managers: 16%
- Professionals: 11%
- Clerical Support Workers: 11%
- Services and Sales Workers: 8%
- Teachers/Trainers/Academics: 4%
- Others: 7%
- Not disclosed: 2%

Age Range

- Not disclosed: 5%
- >55: 10%
- 45-54: 20%
- 35-44: 30%
- 25-34: 35%
- 18-24: 0%
Individual survey – Adoption of Remote Working

Adoption of Remote Working

Start Remote Working Due to COVID-19

- Not disclosed
- Others
- Managers
- Employers
- Technicians
- Professionals
- Clerical Support Workers
- Services and Sales Workers
- Teachers/Trainers/Academics
- Overall
Individual survey – Support of Remote Working

Which of the following device(s) have you used while working remotely?

- Personal computer
- Mobile phone
- Company’s computer
- External Storage Device
- Others

Do you have any protection measures for your Mobile phone/Personal computer?

- Yes
- No

Protection Measures

- Anti-virus software
- Password protection
- Firewall
- Updated OS
- Others
Individual survey – Concerns of Remote Working

Top Concerns During Adoption of Remote Working

- Employees become Disconnected
- Lack of Proper Tools
- Distraction
- Lack of IT support
- Data Breaches
- More exposed to cyber risk

Do you suspect that you are experiencing/ might have experienced data breach(es) in any forms in the past 6 months?

- Yes: 18%
- No: 49%
- Don't know: 33%
Individual survey – Usage of Remote Working

Documents Transfer Channels for Remote Working

- Unencrypted USB/Hard disk
- Public cloud storage
- Personal Email

- Encrypted USB/Hard disk
- Company’s cloud storage
- Business Email

Through Unsafe Channels (55%)
Safe Channels only (45%)
Individual survey – Cybersecurity Awareness

Did you receive any cybersecurity information/news/alert regarding remote working from Company in past 6 months?

- Not disclosed
- Teachers/ Trainers/ Academics
- Clerical Support Workers
- Technicians
- Professionals
- Services and Sales Workers
- Employers
- Managers
- Overall

Did your company organize remote working training for staff in the past 6 months?

- Yes
- No
- Don't know
Highlights

1. Remote working is already a new norm
   - Most individual respondents (~70%) adopted remote working during past 6 months
   - Among them, around 80% start remote working due to COVID-19
   - Most company and individual respondents agree remote working will become more and more popular

2. Video Conference is the most popular remote working features
   - Top 3 features adopted by individual respondents:
     • Video Conference (60%)
     • Webmail (52%)
     • Remote desktop/access (43%)
   - 40% among the video conference users adopted 2 or more different video conference software
Highlights

3. Inadequate resources and support provision among SMEs

• Hardware
  • 39% SMEs did not provide company’s computer to their staff when compared to Large Enterprises (25%)

• Support
  • 58% SMEs did not provide remote working best practices for staff to follow, when compared to Large Enterprises (7%)

• Training
  • 70% individual respondents said their company did not provide remote working training in past 6 months
  • 59% SMEs did not disseminate cybersecurity information/news/alert to staff in the past 6 months
Highlights

4. Cybersecurity Risk and Data Breaches are the major concerns for both individual and company perspective

• Both corporate & individual are worries about Cybersecurity Risk and Data Breaches during remote working

• No guarantee on safeness of remote working devices and document transfer channels
  • “Personal computer” (64%), “Mobile phone” (63%) are the most popular devices among individual
  • Around 45% respondents admit that they used unsafe channels to transfer document for remote working
• Only half of individual respondents have confidence in no data breach(es) in any forms in the past 6 months
Thank you

Should you have any questions, please feel free to contact us.

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