



2023 identiverse

trends report



identity everywhere

A CyberRisk Alliance Production

Welcome

Identiverse® this year reaches its 14th birthday. It has been quite the journey since our founder Andre Durand opened the first Cloud Identity Summit back in 2010; a journey that in great part reflects that of our industry.

At that first event in Keystone, CO, the IAM industry was grappling with the question of how to design identity and access management standards, architectures, and products, in support of the burgeoning shift of enterprise infrastructure from on-premise to cloud deployments. At the same time, it was evident that identity was becoming the new security perimeter; and this in turn was driving a need to build strong, broad, and lasting relationships between the security and the identity industries.

Just a few years later, responding to the widening impact of digital identity in so many areas of our digital world, Cloud Identity Summit became Identiverse, encompassing not only the core digital identity topics, but adjacent cybersecurity and privacy realm themes, and supporting the development of an increasingly professionalized industry.

As we approach Identiverse 2023, we're at the start of our next parallel phase of evolution.

Identity is now everywhere, enabling safer, more private, more efficient experiences and interactions for customers, customers and citizens; online, and increasingly, in the physical world as well. The boundaries are blurring, and that has tremendous implications not only for the industry itself, but for all the organizations that rely on digital identity technologies to provide their services.

Recognising and responding to this, 2023 sees us take our first steps—of which this inaugural Identity Trends Report is one—towards year-round engagement with our industry and with our growing community. It's a community that welcomes a wide range of professionals, and an increasing number of senior leaders and decision-makers from every sector. Digital identity is critical infrastructure for the 21st century; as part of the CyberRisk Alliance family, Identiverse is proud to continue to support the digital identity professional, to promote best practice across the industry, and to enable leaders to incorporate digital identity into their strategic thinking.

Andrew Hindle

Conference Chair, Head of Strategy & Content

Identiverse



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The annual **Identiverse**® conference call for presentations provides a unique window into how the digital identity and security industry is responding to the shifting demands for business growth, cybersecurity posture and regulatory compliance.

This year we're delighted to release the first annual **Identiverse Trends Report**, informed by a review of hundreds of call for presentation responses and refined by discussions with members of the Identiverse Advisory Board and other industry luminaries.

This report aims to distill the key themes and trends from the submitted presentations and thereby provide insight into the priorities of leaders, executives, and digital identity professionals to inform your digital identity strategy for the next 12-18 months.

To learn more:

[visit the Identiverse website](#)

[review the video Identiverse archive](#)

[attend the Identiverse conference](#)

The main trends that surfaced over the past several months are:

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At the 2022 Identiverse conference we heard a lot about developments in personal identity. That trend has, if anything, accelerated into 2023, with significant progress worldwide in enabling citizens to more easily demonstrate not only their 'identity', but also to discretely share information about themselves—age eligibility or driving entitlement for instance—in security and privacy-preserving ways.

But there are challenges to overcome.

The obstacles were highlighted in **CyberRisk Alliance's April 2023 Cybersecurity Buyer Intelligence Report on Identity and Access Management**, in which 203 security executives, administrators, managers, directors and compliance practitioners from North America were surveyed in December 2022 and January 2023. Respondents noted that IAM products, including technology designed to enable "identity everywhere," are still overly complex, straining the user experience.

Sixty-two percent are focused on "connect anywhere" technology and 30% are planning more focus there in the next 2 years. Fifty-six percent hope to use the technology specifically to improve the user experience.

In the bigger picture, the need to improve personal identity stretches well beyond the digital realm. Identiverse conference attendees and security professionals from across the CRA audience must contend with configuration challenges that come with physical/hardware components and the ongoing proliferation of devices used to connect to both work and personal applications.

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reusable identity

Reusable identity is the practice of using a single digital identity to access multiple services and applications, rather than creating a separate identity for each one. With a reusable identity, a user can authenticate themselves once and then access all the services that are linked to their identity without having to re-enter their credentials each time.

LIMINAL INSIGHT:

The Reusable Identity Market has an estimated TAM of \$32.8B in 2022, and is expected to grow at a 68.9% CAGR by 2027. Personal Identity Ecosystems (PIE) is one of the factors that will make up that growth.

Source: Liminal's Reusable Identity Trends Report, February 2022



Reusable identity is typically achieved through the use of identity federation, which allows different systems and applications to recognize and trust the same digital identity. Identity federation uses standards such as SAML (Security Assertion Markup Language) or OAuth (Open Authorization) to enable the sharing of authentication and authorization information between systems.

As those developments continue in both the regulatory and the technical spheres, we're also seeing a resurgence in activity around non-person entities: connected vehicles, legal entities like businesses, smart sensors for both industrial and domestic applications, and more. At the same time, the burgeoning adoption of digital identity technologies, including biometrics, raises important ethical questions around diversity and inclusion, access and digital exclusion, privacy and regulatory balance. We're still at the start of this particular journey, but expect the pace to pick up very rapidly!

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accelerating business

Each year, Identiverse includes representation of material covering real-world deployments and how those deployments are used to accelerate business growth. From workforce and supply-chain use-cases through to large-scale consumer-oriented applications, identity teams from enterprises large and small have shared their real-world experience with their peers.

This year, alongside the more technically-focused presentations and workshops, we're excited to see an increased focus on business rationales and outcomes. The identity layer is foundational to successful digital transformation projects, and we're now seeing conclusive data to support that.

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death of passwords = long live authentication

In 2022, authentication took a significant step forward with the advent of passkeys. We're starting to hear more about the successes and learnings of early deployments. From a technical perspective there is plenty of work still to be done; and consideration will also be given to help user adoption. It's clear that passkeys can be the gateway to a 'passwordless' internet and have the potential to make our online experience both considerably simpler and significantly safer.

LIMINAL INSIGHT:

Bolstered by FIDO2 support and big tech, demand for passwordless authentication solutions is expected to grow and create a significant shift for vendors across the landscape. We expect FIDO2 to accelerate passwordless authentication adoption by introducing interoperable, secure, open standards across a user's devices.

Source: Liminal, Outside-In Report, August 2022



We've heard less about authorization over the past few years—but this year that's changed. It's still early days, but indications are that there will be a renewed focus on access control, entitlements, permissioning over the next few years. Aligning with this is the rise of Identity Threat Detection and Response ("ITDR") as a critical tool in the cybersecurity kit bag; and an associated recognition that identity data in and of itself also needs careful protection. Keeping employees, customers, and their data safe is no longer simply a compliance checkbox. It's a business imperative, and if it's not done well, customers will take their business elsewhere.

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more emerging technologies

The Identity business has always been alive with new technologies and startups, but we're seeing more momentum in newly emerging technologies in this space than we have for a few years. Personal Identity is a particular focus, but we're also seeing significant developments and investments in areas like identity orchestration, API protection and privacy-related technologies; as well as some consolidation and related M&A activity. Investment trends are helpful to observe for business leaders as much as for technologists, and it's an area we'll be paying more attention to at Identiverse.

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With all this activity across the industry—and increasing interaction with the adjacent privacy and cybersecurity professionals—it’s no surprise that the digital identity profession is growing at an astounding rate. Practitioners continue to be keen to share experience with their peers and to exchange both technical best practices, and career and skills development advice and learning. A healthy profession is vital to support the growing demands of business and consumers for better and safer digital experiences.

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in summary

Digital identity has become ubiquitous as a key driver not only of good business, but of good customer experience. And customers expect more from the services they access online: it's no longer enough to provide a service that's easy to use, quick to transact with, and accessible seamlessly across any device.

As we carry on our digital lives, we expect to be kept safe—and for that safety not to interfere with our transactions. We expect our personal data to be kept private—and for that privacy to be built-in by default and by design. Increasingly, we expect to have real control over our digital identity data. If organizations don't provide these capabilities of their own volition, regulation and legislation will push them to do so. But let's be clear: the opportunity to get digital identity right is just that—an opportunity. Winners in their respective markets will seize this chance to outperform their competition.

Supporting this rapid growth in the fundamental importance of digital identity is a corresponding growth in the industry itself: solutions and services providers are innovating at a tremendous rate, and the digital identity professional is gearing up to take advantage of new architectures and technologies.

The next 12 months are likely to prove transformative for identity, and for all the business, services, solutions, and people that rely on digital identity—sometimes without realizing it—to enable their digital experience.

Identity really is everywhere... let's see what it can do for us.



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about Identiverse

Identiverse is where the digital identity community comes together. Now in its 14th year, Identiverse is a must-attend annual event that brings together over 2,500 security professionals for 4 days of world-class learning, engagement, and entertainment. Offering more than 70 hours of top-notch content showcasing enlightening keynotes, informative panels, and hands-on masterclasses—attendees can connect with their peers during networking receptions and fun interactive group activities like bootcamp, yoga and more. To learn more, visit [identiverse.com](https://www.identiverse.com).



about CyberRisk Alliance

CyberRisk Alliance (CRA) is a business intelligence company serving the high growth, rapidly evolving cybersecurity community with a diversified portfolio of services that inform, educate, build community, and inspire an efficient marketplace. Our trusted information leverages a unique network of journalists, analysts and influencers, policymakers, and practitioners. CRA's brands include SC Media, Security Weekly, ChannelE2E, MSSP Alert, InfoSec World, Identiverse, Cybersecurity Collaboration Forum, its research unit CRA Business Intelligence, the peer-to-peer CISO membership network, Cybersecurity Collaborative, and now, the Official Cyber Security Summit and TECHEXPO Top Secret. To learn more, visit [cyberriskalliance.com](https://www.cyberriskalliance.com).



about Liminal

Liminal is a boutique strategy advisory firm serving digital identity, fintech, and cybersecurity clients, and the private equity and venture capital community. Since 2016, we have offered objective, high impact strategic advice, and analytical services, helping to support clients in crucial business decisions at all stages of the product and business lifecycle. To learn more, visit [liminal.co](https://www.liminal.co).



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