

Trends in Email Security

Security Controls and the Move to Cloud-delivered Email

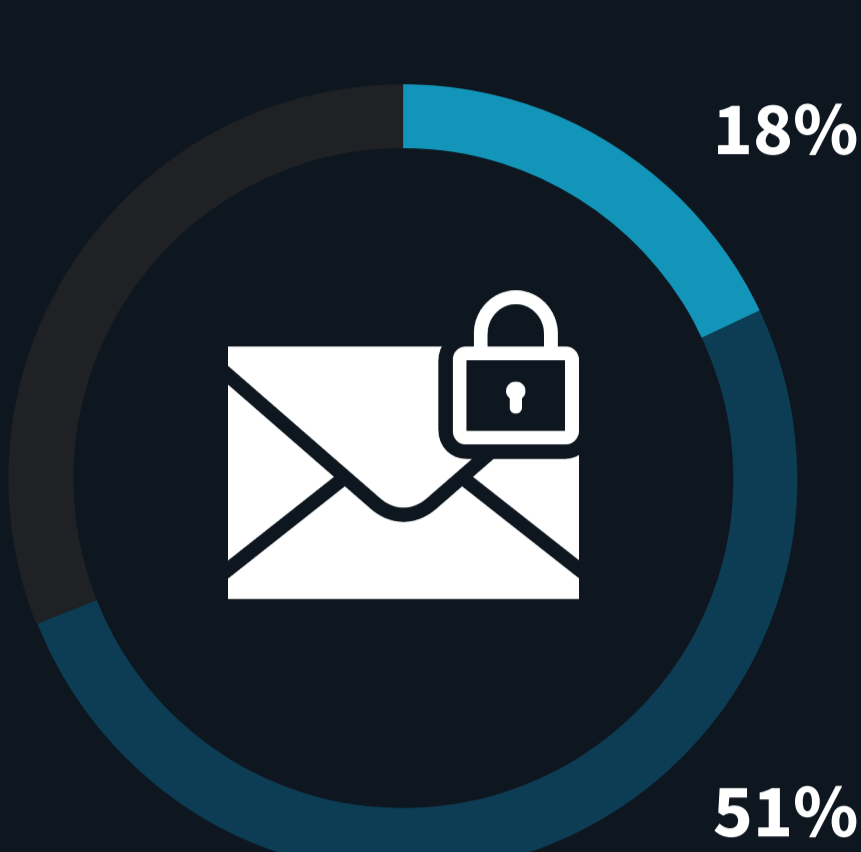
PROTECT YOUR EMAIL

With most organizations standardizing on cloud-delivered email in an effort to shift costs from CapEx to OpEx, they did so with the underlying assumption that email service providers would automatically include comprehensive security controls. However, many have suffered from phishing-related attacks that have led to credential theft and business email compromise (BEC), while others have faced the loss of sensitive data through both unintentional and intentional actions, leading to the addition of third-party security controls.

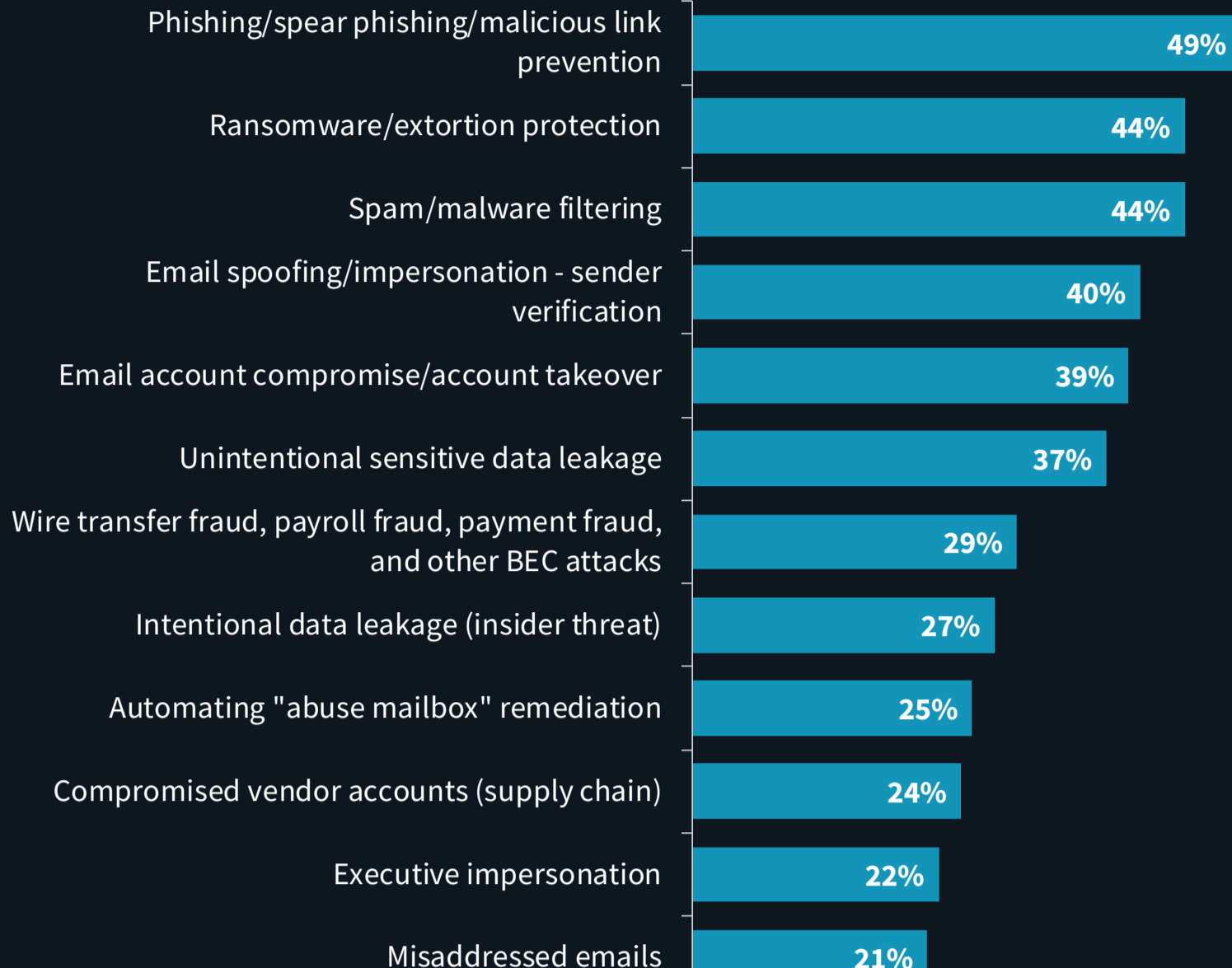
Most view email as a top five cyber threat vector, with phishing considered the leading email security concern.

IMPORTANCE OF EMAIL SECURITY

- Our most important cybersecurity priority
- One of our top 5 cybersecurity priorities



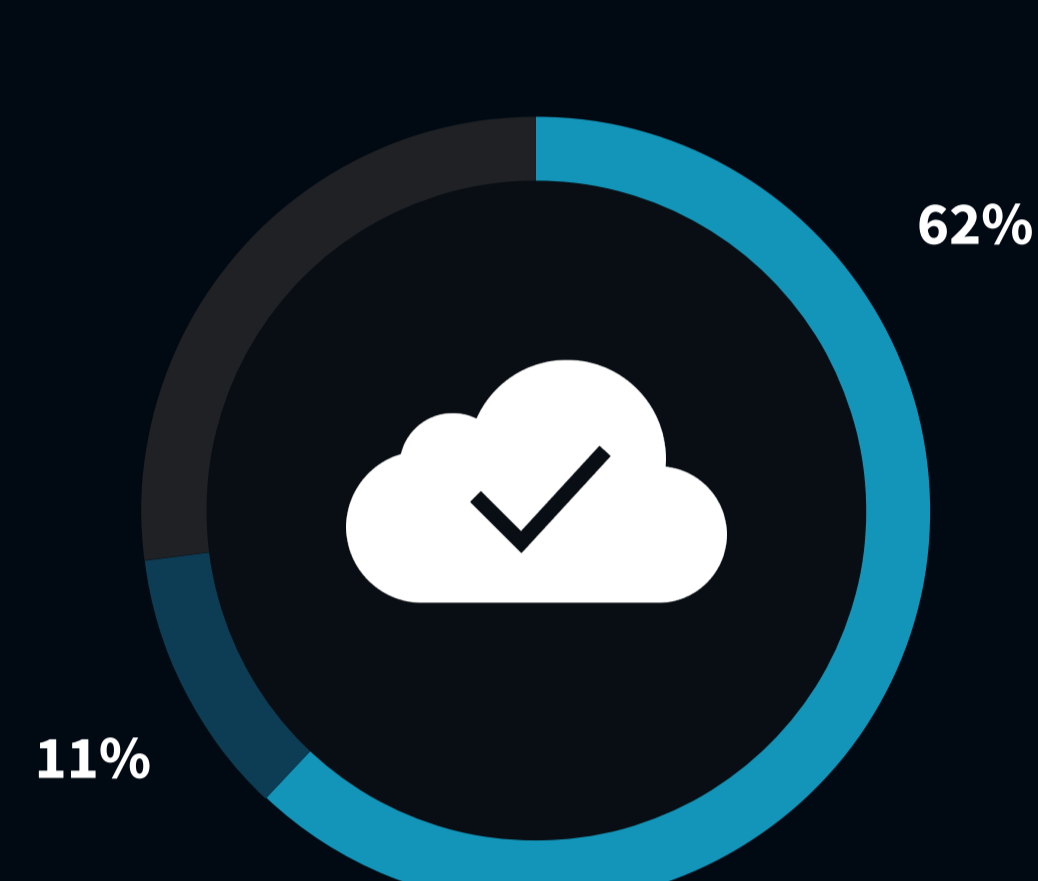
CYBER THREATS CONSIDERED HIGH RISK



A majority of organizations run cloud-delivered email, and most plan to use third-party controls to fill native security gaps.

ORGANIZATION'S PRIMARY EMAIL APPLICATION SOLUTION

- Microsoft Office 365
- Google Gmail

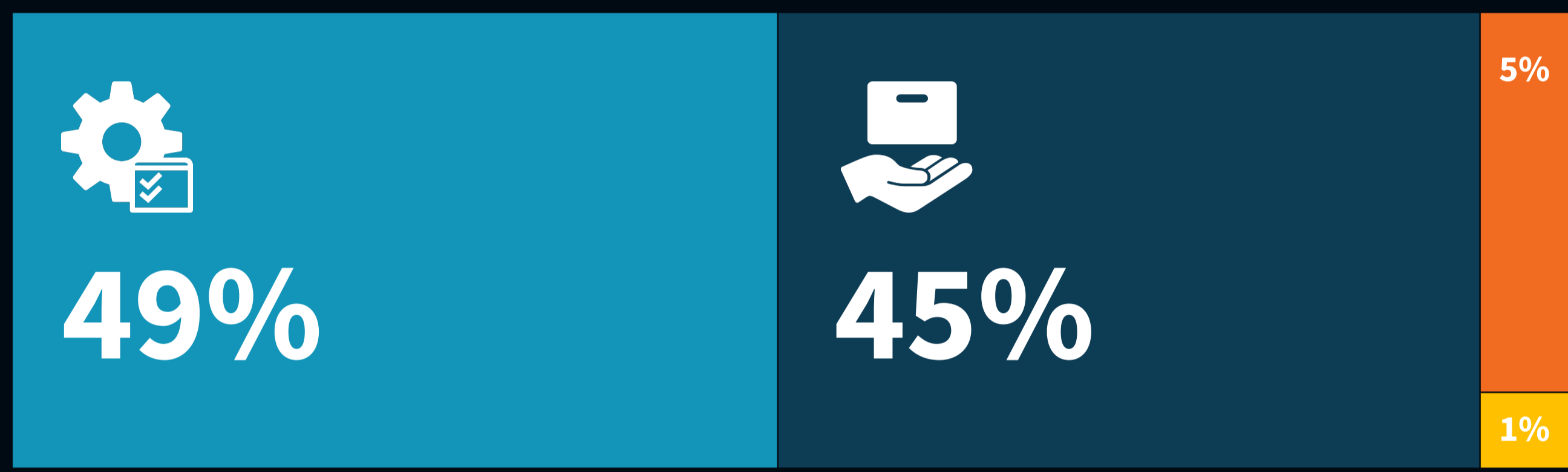


72% say their primary email platform is cloud-based



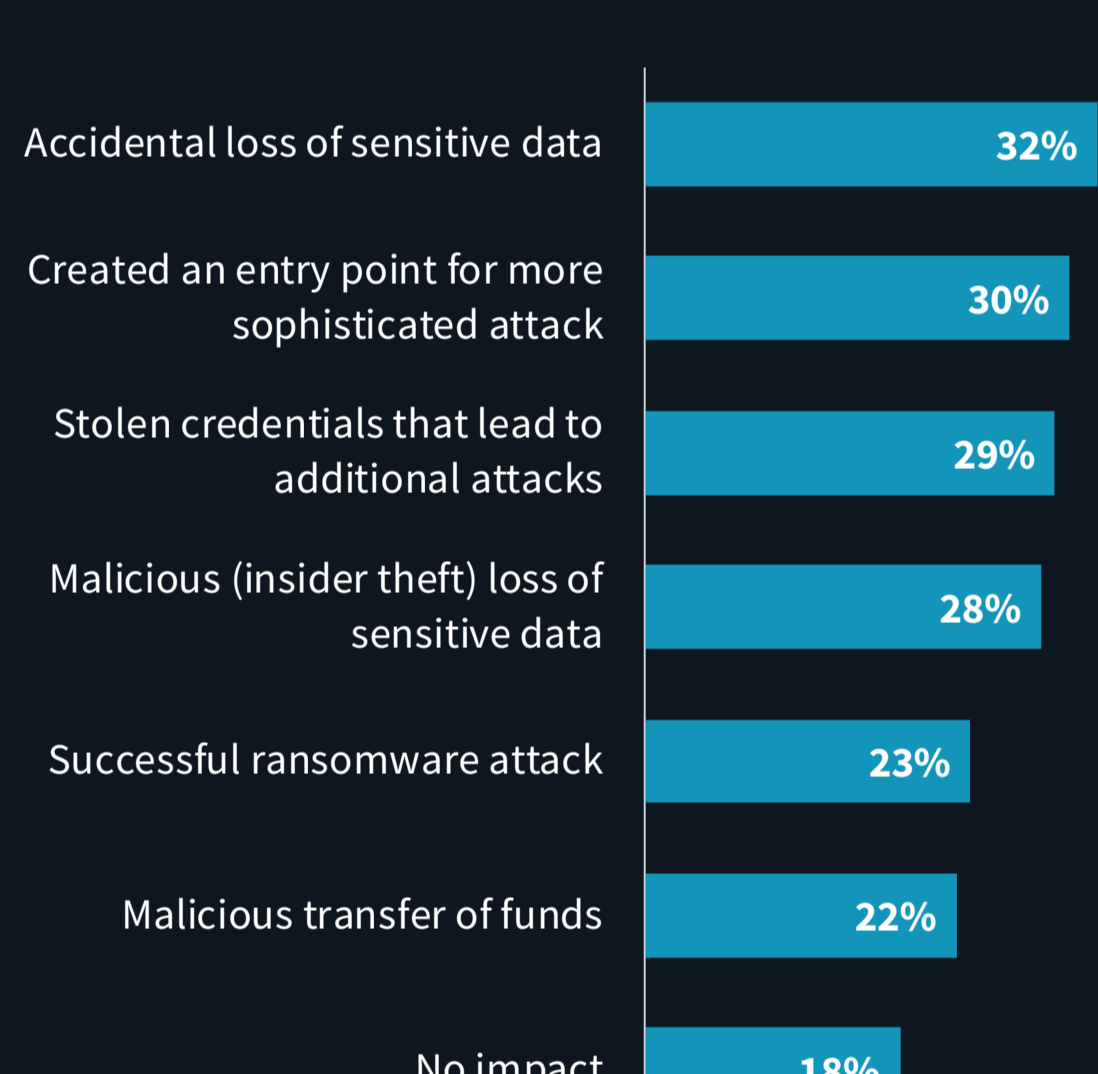
ADDRESSING GAPS IN CLOUD-DELIVERED EMAIL SERVICES

- We will implement third-party controls
- We will use a managed service provider to fill the gaps
- We plan to do nothing and wait for the CSP to fill the gaps
- Don't know



Protecting Unintentional Sensitive Data Leakage Is a Top Concern

IMPACTS OF EMAIL SECURITY INCIDENTS



19% of organizations added third-party email security controls to combat unintentional sensitive data leakage.

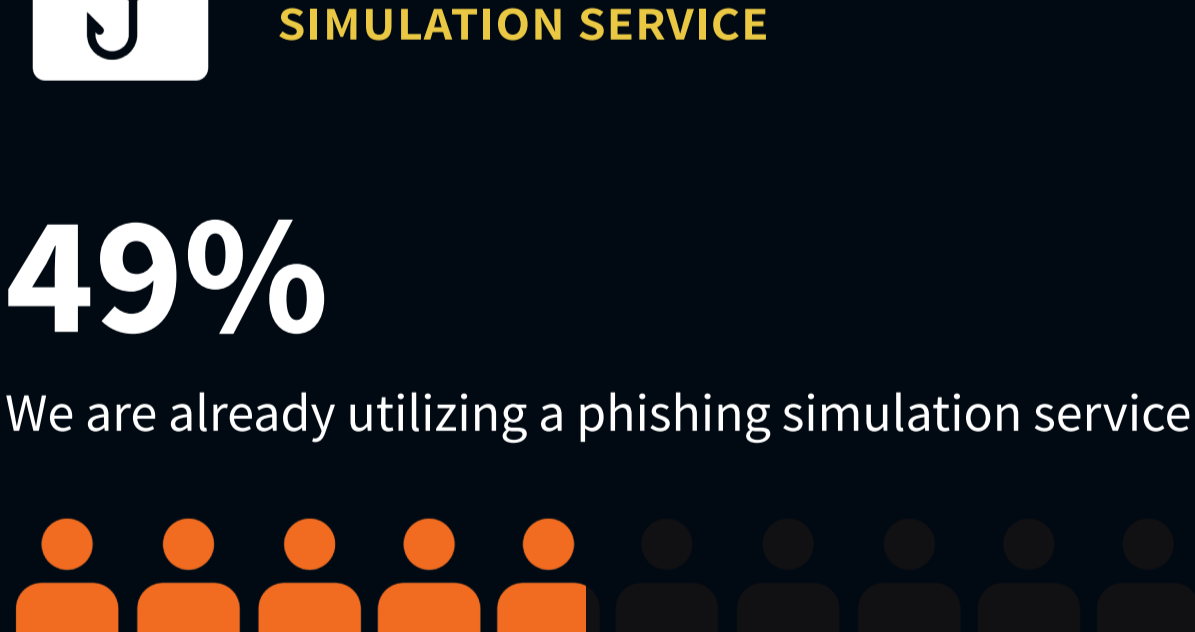


End-user Security Awareness Training and Phishing Simulation Programs Are Becoming Mainstream

FORMAL END-USER SECURITY TRAINING PROGRAM



USAGE OF A PHISHING SIMULATION SERVICE



Nearly Two-thirds Will Reevaluate Email Security Controls and Subsequently Increase Spending

THE EVOLVING EMAIL THREATS LANDSCAPE EFFECT ON INVESTMENT STRATEGIES



EXPECTED SPENDING CHANGE FOR EMAIL SECURITY



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