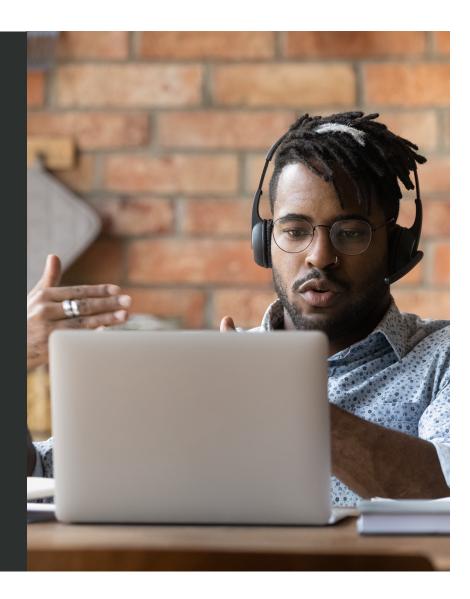
Security Priorities Study 2024



The security situation



What's happening in the security department? Source: CSO Security Priorities Study, 2024

75%

of security decision-makers say that understanding which security tools and solutions fit best within their company is **becoming more complex**

67%

of organizations are **aware of what caused** data security **incidents** they have experienced over the past 12 months.

59%

agree that their **responsibilities** include addressing information security issues **outside of their country or region**

Question: Please rate your level of agreement with the following statements:



The role of the security decision-maker is expanding



of security decision-makers say that their role has expanded to include additional responsibilities over the past 12 months

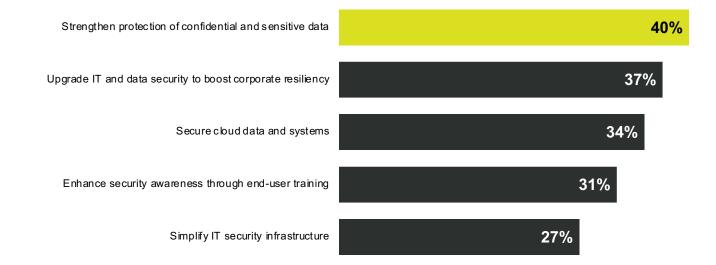
Top five responsibilities they are taking on:

- 1. Cybersecurity strategy and policy development
- 2. Risk management
- 3. Securing Al-enabled technology
- 4. Innovation and emerging technologies
- 5. Security architecture and technology updates

Question: Has your role expanded to include additional responsibilities over the past 12 months? AND What additional responsibilities have you taken on in your role?



Key security priorities organizations are focused on



Question: What are your organizations top security priorities for the coming year?



Top five challenges inhibiting security goal achievement



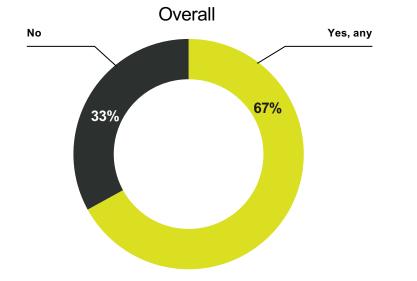
Question: What challenges are keeping you from achieving your security goals?

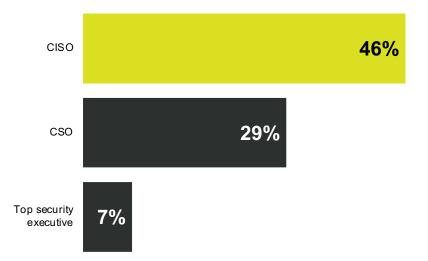
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Security's role within the organization



Investing in executives to support security initiatives

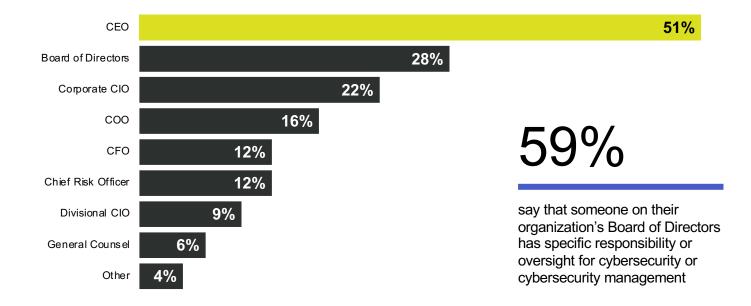




Question: Does your company have a CISO, CSO or top security executive? (Please select all that apply)



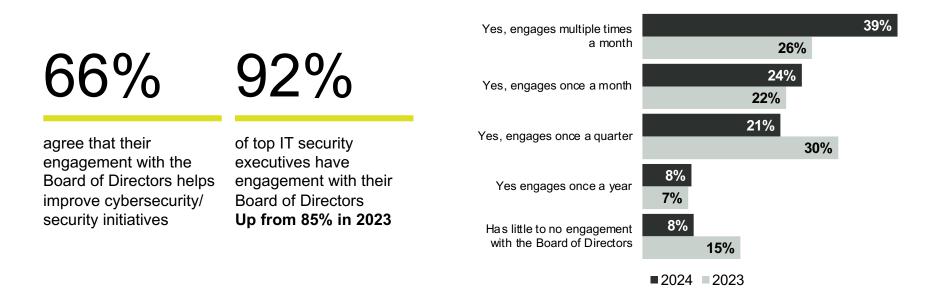
Reporting structure of security executives



Question: To whom does your CISO, CSO or equivalent report, directly and indirectly?



Growing engagement with Board of Directors



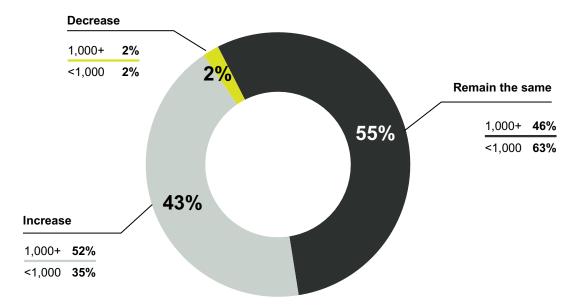
Question: Does your CSO/CISO/top security executive have regular engagement with the Board of Directors ?



Security investment plans



Security budgets expected to increase or hold steady



Question: Do you expect your organization's overall security budget to increase, decrease or remain the same in the next 12 months?



Al-enabled technology	39%		23%	15%	10%	13%	
SOAR (Security Orchestration, Automation and Response)	33%	13%	22%	12%		21%	
Deception Technology	33%	12%	19%	11%	2	:5%	
Zero trust technologies	31%	17%	24%		12% 16%		
DevSecOps adoption	29%	15%	22%	11%	11% 23%		
Cloud-based cybersecurity services	29%	12%	32%		13%	14%	
SASE (Secure Access Service Edge)	29%	15%	21%	12%		23%	
Cloud access security brokers (CASBs)	29%	13%	22%	11%	2	25%	
XDR (Extended Detection and Response)	28%	14%	26%	139	%	18%	
Customer Identity and Access Management (CIAM)	26%	13%	29%	15	%	17%	
Identity threat detection and response (ITDR)	26%	15%	30%		14%	15%	
Cloud data protection (protecting data in the cloud)	26%	14%	31%		15%	14%	
Cloud posture management tools	25%	15%	23%	23% 14%		22%	
Data analytics	25%	12%	32%		17%	14%	
Network monitoring/forensics/ESM tools	25%	12%	31%	16	5%	16%	
Security evaluation services provided by third-parties	25%	12%	34%		14%	15%	
	■ On my radar or actively re	searching <mark>P</mark> ik	oting 📕 In production 🔳	Upgrading/refining	g ■Notinte	rested	

Researching and piloting solutions to meet security goals

Question: Which option best describes your current activity for each of the following security solutions, services, or models?



Al-enabled technology	49%	25% 4%	12% 9%
Data analytics	41%	42%	7% 5% 5%
Application development security	38%	50%	<mark>5%</mark> 3% 3%
Cyber risk insurance	37%	44%	<mark>6%</mark> 8% 4%
Access controls	36%	55%	<mark>4%</mark> 2%29
Security education/awareness training	35%	53%	<mark>4%</mark> 5% 3%
Authentication (multifactor	34%	53%	<mark>5%</mark> 5% 2
Security evaluation services provided by third-parties (e.g.,	34%	48%	<mark>7%</mark> 6% 5%
Cloud data protection (protecting data in the cloud)	34%	48%	4% 7% 8%
Cloud-based cybersecurity services (security solutions	33%	48%	6% 7% 6%
Cloud in frastructure management technology	31%	50%	6% 6% 6%
Zero trust technologies	31%	45% 4%	8% 11%
Software vulnerability scanning/testing	31%	54%	5% 6% 4%
Cloud access security brokers (CASBs)	31%	44% 5%	11% 9%
Incident response	31%	55%	<mark>6%</mark> 5% 4%
Da ta access gove man œ	31%	51%	6% 6% 6%

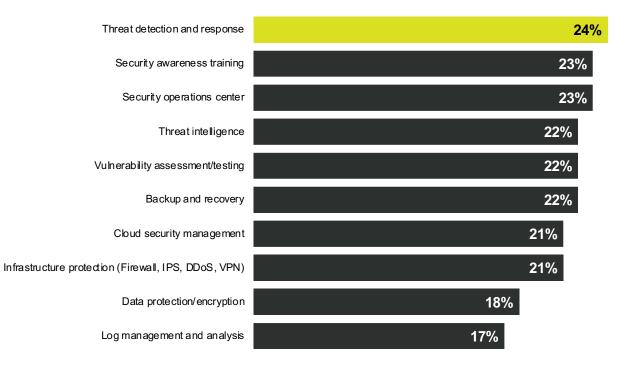
Al-enabled security tools see the greatest increase in spending

Increase Remain the same Decrease New category now/potential new investment Potential new investment area in the future

Question: Please describe how your company's level of spending in the following areas will change over the next 12 months.



Planning to outsource these security functions



82%

will outsource security functions to a managed security services provider or other third-party in the next 12 months

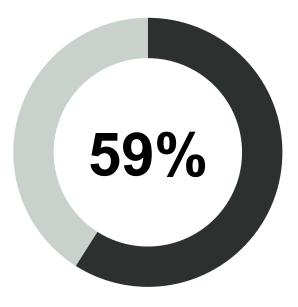
Question: Which of the following security functions will your organization outsource over the next 12 months to a managed security services provider or other third-party (not including SaaS)?



Activity around Al-enabled security solutions



Security buyers more likely to consider AI security tools



of security decision-makers say that their organization is more likely to consider a security solution that uses Artificial Intelligence (AI)

Up from 52% in 2023

Question: Please rate your level of agreement with the following statements:



Many plans to leverage AI in security technologies

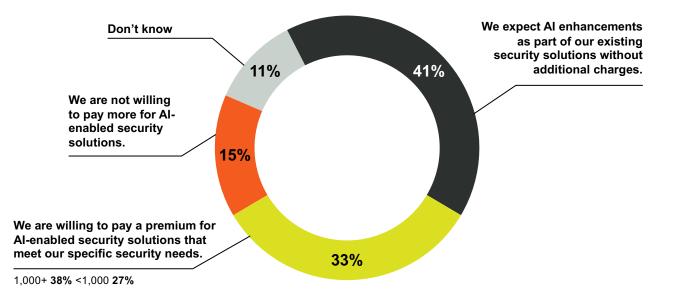
Malware detection	26%	36%		16%	15%	8%
Threat detection	24%	40%		14%	13%	8%
Automation – alert and triage	23%	39%		15%	14%	9%
Data loss prevention	20%	34%		21%	16%	8%
Real-time risk prediction	20%	38%		17%	16%	8%
Improving enterprise system visibility	20%	33%		0%	17%	10%
Incident response	19%	35%		21%	15%	9%
Authentication	19%	29%	27	'%	17%	8%
		Proving Al _ Diagning to lowerage Al _ No	nlong to louror			

Currently leveraging AI Planning to leverage AI No plans to leverage AI Don't know Not applicable

Question: In which areas are you leveraging or planning to leverage Artificial Intelligence (AI) in your security technologies?



And they're expecting their vendors to add AI enhancements



Question: What is your organization's stance on investing in AI-enabled security solutions?



Benefits from AI-enabled security tech

Reduced employee workload	44%
Faster remediation of threats	43%
Faster identification of unknown threats	42%
Improved vulnerability management	40%
AI can sift through large amounts of data faster than previous solutions	39%
Eliminates time consuming tasks	39%
Accelerates detection and response times	38%
Allows our security organization to be more proactive	38%
Better network monitoring	36%
Improve enterprise visibility	33%
Better network and systems visibility	32%
Recommends appropriate vulnerability resolutions that speed remediation	28%

Question: What benefits are you currently seeing from AI-enabled security technologies utilized by your organization?



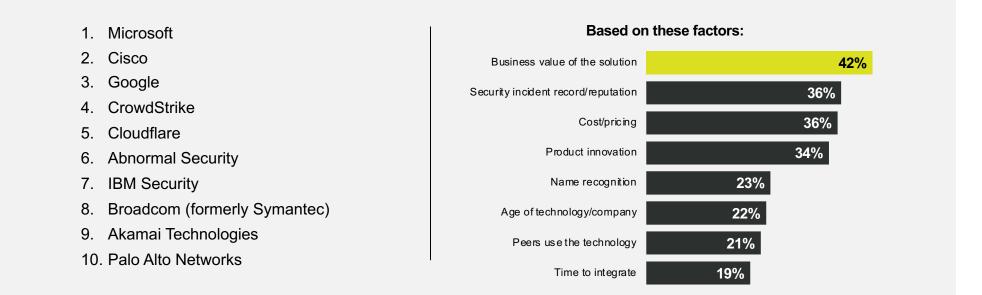
Source: CSO Security Priorities Study, 2024

98%

have seen benefits from the AI-enabled security technologies utilized by their organization

> Up from 72% in 2023

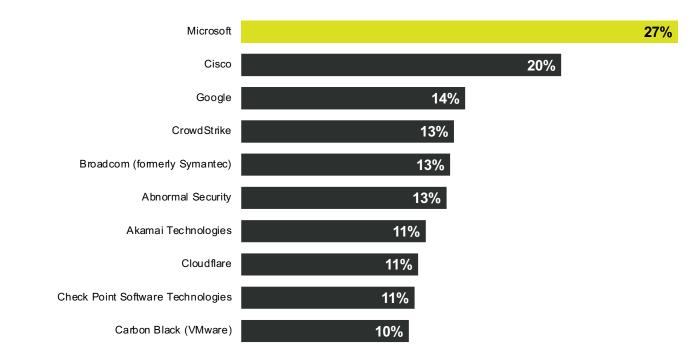
Top 10 leaders in Al-enabled security



Question: Which technology providers do you consider to be leaders in Al-enabled security? AND In the prior question, what were the most important factors in your decision to select a provider as a leader in Al-enabled security?



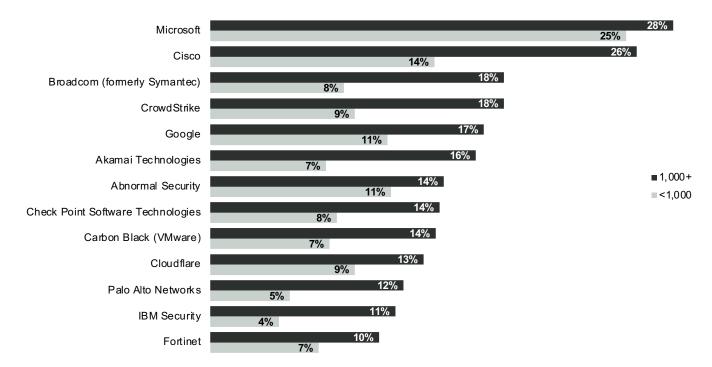
Al-enabled security vendors currently in use



Question: Is your organization currently using Al-enabled security products from any of the following vendors?



Higher use among enterprise organizations



Question: Is your organization currently using Al-enabled security products from any of the following vendors?



Conclusions

One-third of companies are not aware of what caused their data security incidents over the past year, and three-quarters say it's becoming more complex to understand their security tech stack. Despite too many competing priorities challenging businesses from achieving their security goals, security decision-makers are aiming to improve the protection of sensitive data and corporate resiliency. To assist with their initiatives, top security execs have regular engagement with their Board of Directors. This relationship has significantly grown in the past year, further proving security's spotlight. IT leaders are addressing security risks by investing in new solutions and increasing spend on what they have in their current security stack. Al continues to be sought after and shows clear benefits. More than half are likely to consider a security solution that uses AI, but vendors must step up and offer insight into business value of the solution, security incident record, cost, and innovation.

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