



The C-Suite Report

Business and Security Strategies
for The Unbound Enterprise

WSJ INTELLIGENCE

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THE WALL STREET JOURNAL | BARRON'S GROUP

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Executive Summary

Prior to 2020, we knew where digital transformation was taking us. However, due to the pandemic, the journey to cloud migration happened at light speed. As a result, businesses today are now less constrained by traditional network infrastructures and designated worksites, and their employees have the freedom to work wherever and whenever.

We call this the new era the Unbound Enterprise. Forcepoint partnered with Wall Street Journal Intelligence to survey more than 500 CEOs and CISOs around the globe for their insights on how business and security are forever changed in today's distributed enterprise landscape.

Key highlights include:

Business and Security Landscape Forever Changed

- Cyber attacks on the rise -- supply chain (60%), ransomware (54%), custom malware (57%), phishing (56%) and on
- Level of business disruption due to COVID – supply chain (59%), security (50%)

Hybrid Work Environments and Converged Security Capabilities Top of Mind

- Nearly all organizations adjusted their cyber strategy for the distributed enterprise
- Enterprises recognized the need for...
 - Integrated “Trust Framework” to accommodate dispersion of users and devices (58%)
 - Tightly integrated security capabilities that cross traditional product boundaries (53%)
- 48% substantially increased cloud-based cybersecurity systems

Security is a Business Enabler and Competitive Differentiator

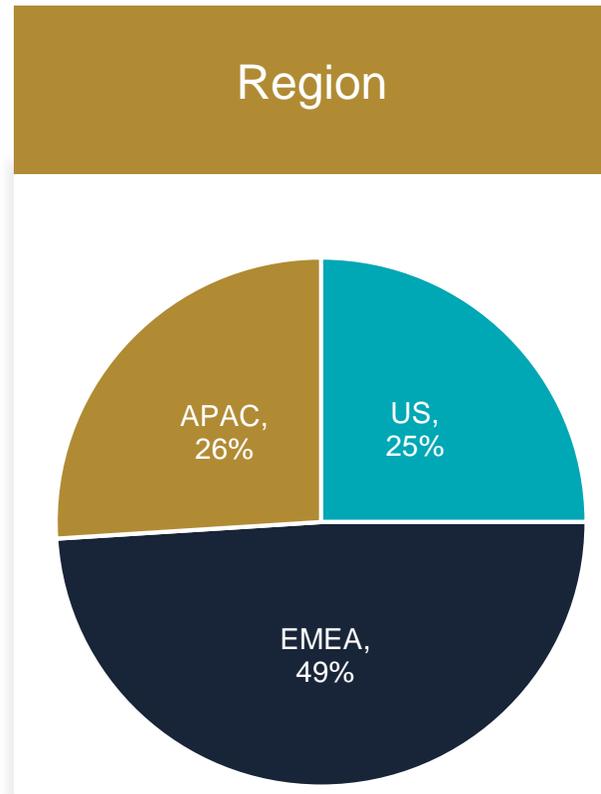
- 55% report security accelerating digital transformation; 52% note it has created competitive advantage and enabled higher productivity across the organizations
- Enterprises that embrace this opportunity will see their business thrive versus just survive in the next 5-10 years

CEOs and CISOs are Bullish on SASE

- Analysts have estimated 60% of enterprises would be on a path to SASE by 2025, however COVID accelerated this timeline even further
- 90% of CEOs and 84% of CISOs indicated they have already adopted or were on a path to adopt SASE

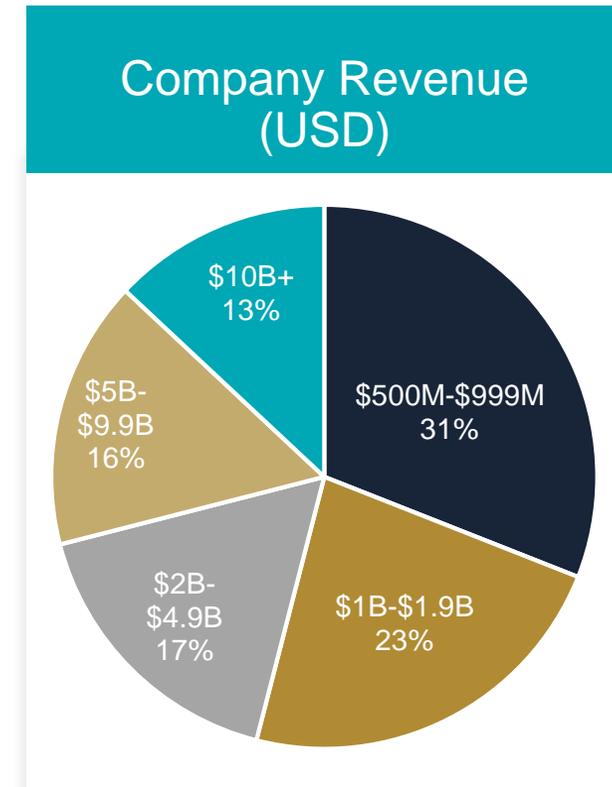
Methodology/Respondent Profile

WSJ Intelligence, with sponsorship of Forcepoint, conducted a short quantitative study that was developed and fielded among 508 global CEOs and CISOs from December 2020 to January 2021. All U.S. respondents were from companies with \$1B+ in revenue. 42% of APAC and EMEA respondents came from companies with \$500M-\$999M in revenue.



Industries

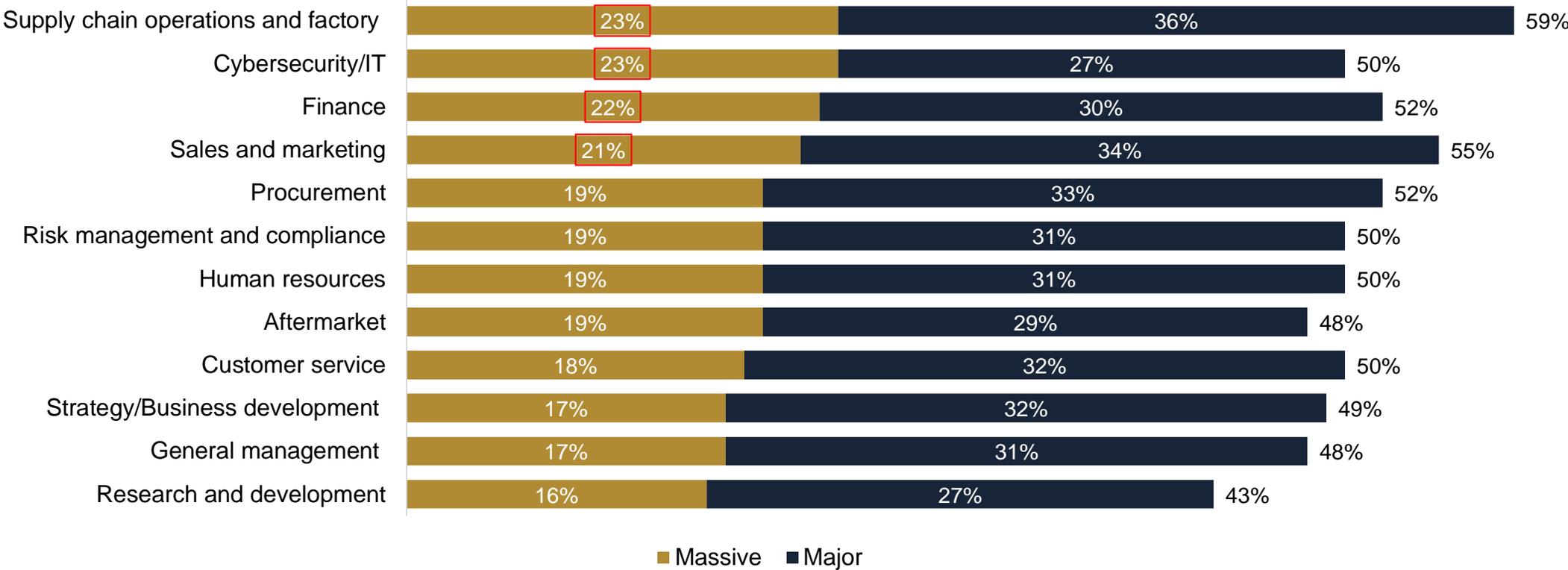
Healthcare/ Life sciences	23%
Finance	16%
Retail	16%
Manufacturing	15%
Telecom	11%
Energy	10%
Transportation	9%



Total Respondents: CEOs 50%, CISOs 50%
EMEA: United Kingdom, France, Germany, Italy, UAE
APAC: India, Australia, Singapore

Cybersecurity/IT Experienced Massive Disruption, Similar to More Attention-Grabbing Issues Like Supply Chain

Level of Disruption Due to COVID-19 to Key Areas of Organization

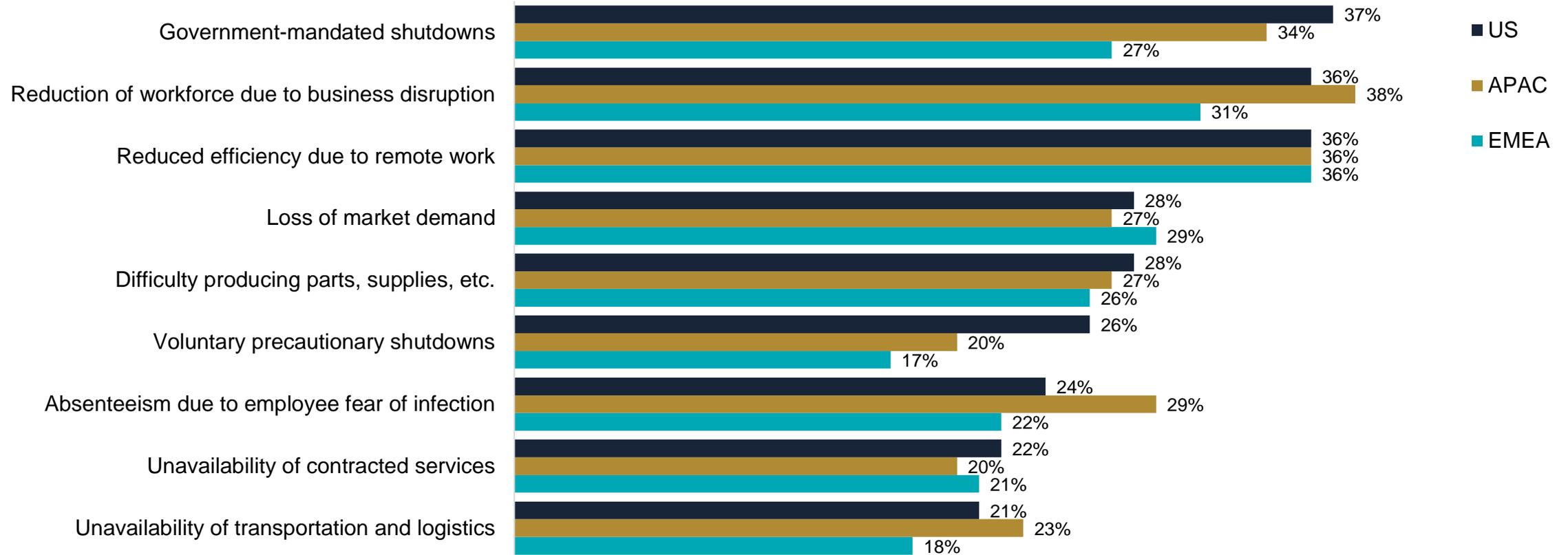


Statistically significant difference

Source: WSJ Intelligence & Forcepoint CEO & CISO Study, Winter 2021. Base: Total respondents n=508. Q1: To what extent, if at all, have the following functions of your organization been disrupted by the COVID-19 pandemic?

Workforce and Remote Work Issues, Alongside Government-Mandated Shutdowns, Are Most Severe Pandemic Impacts

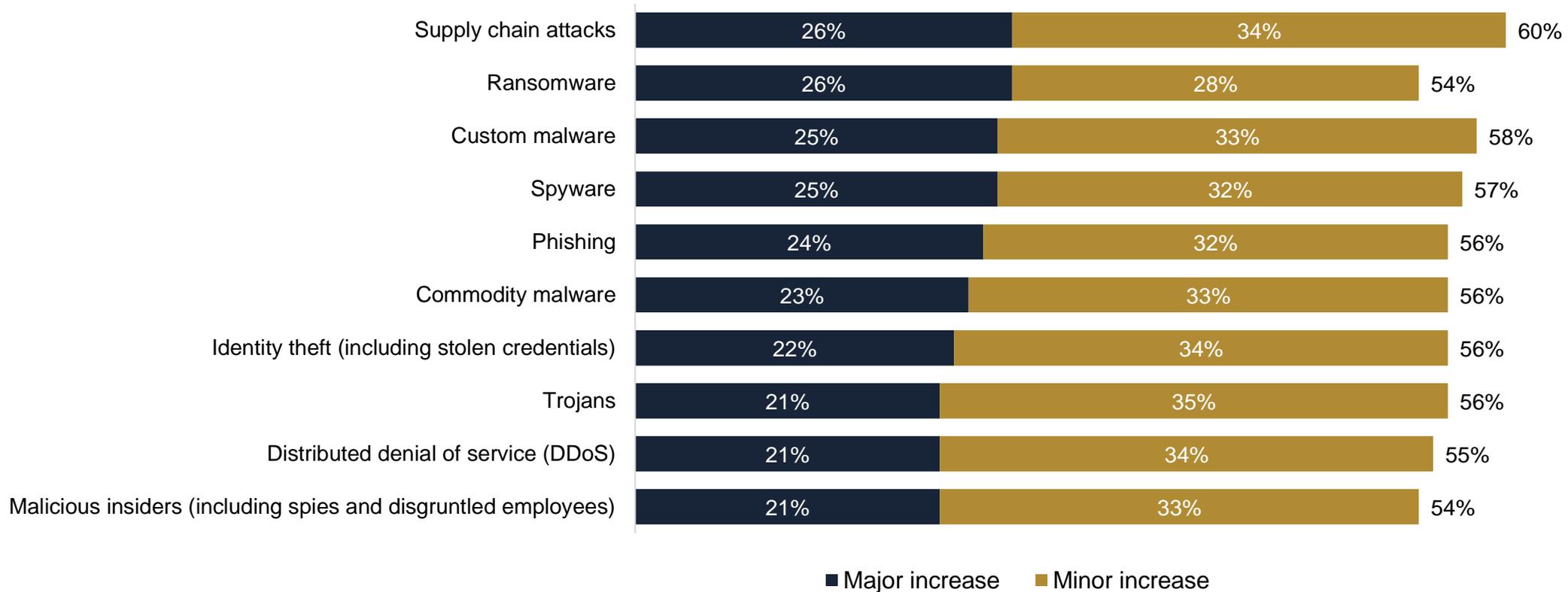
Events Which Caused Most Severe Disruption



Source: WSJ Intelligence & Forcepoint CEO & CISO Study, Winter 2021. Bases: US n=126, APAC n=132, EMEA n=250. Q3: Which of the following pandemic-related events have been the most severe cause of disruption to your organization's business functions?

A Surge of Cyberattacks of All Types

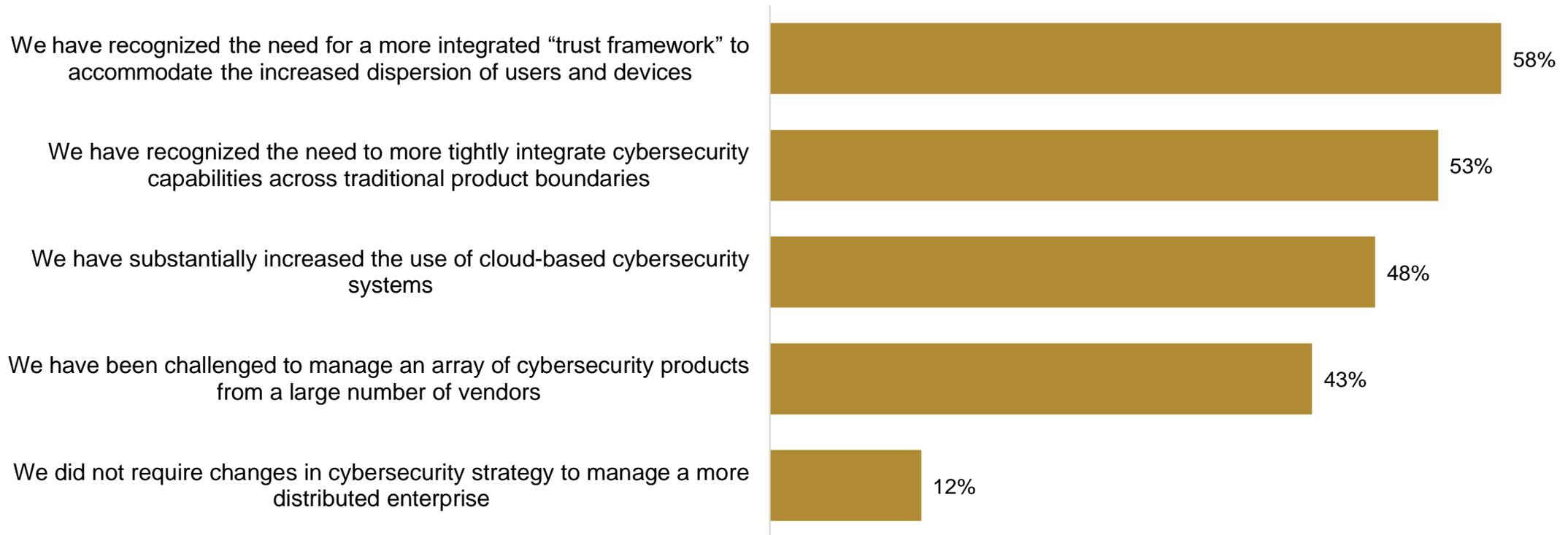
Change in Volume of Cyberattacks Since COVID-19



Source: WSJ Intelligence & Forcepoint CEO & CISO Study, Winter 2021. Base: Total respondents n=508. Q9: To what extent has the volume of cybersecurity attacks against your organization changed in each of the following categories since the advent of the COVID-19 pandemic?

Virtually All Adjusted Their Cybersecurity Strategy to Address a More Distributed Enterprise

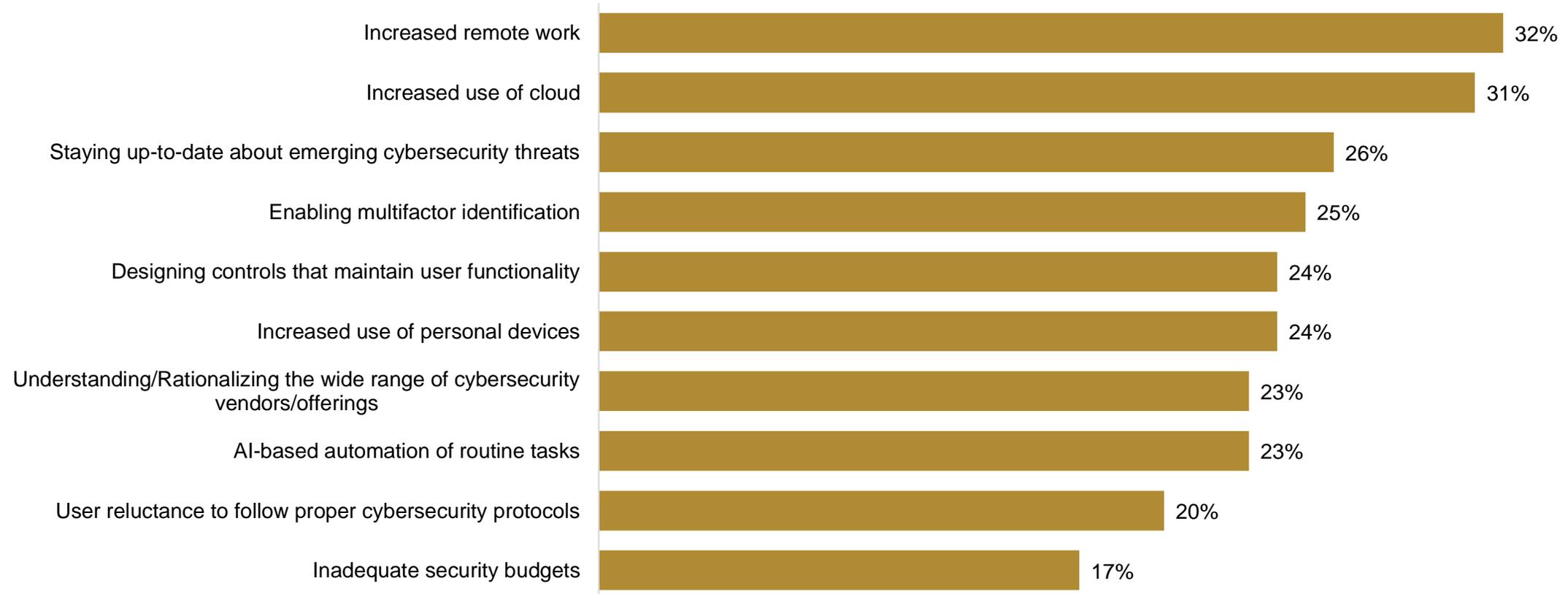
Cybersecurity Strategies Used to Manage a More Distributed Enterprise
(among those in a distributed enterprise)



Source: WSJ Intelligence & Forcepoint CEO & CISO Study, Winter 2021. Base: Total respondents n=508. Q16: Which of the following statements describe your organization's efforts to adapt its cybersecurity strategy to facilitate a more distributed enterprise?

Securing the “Unbound Enterprise” [Remote Work/Cloud] Presents the Greatest Challenges

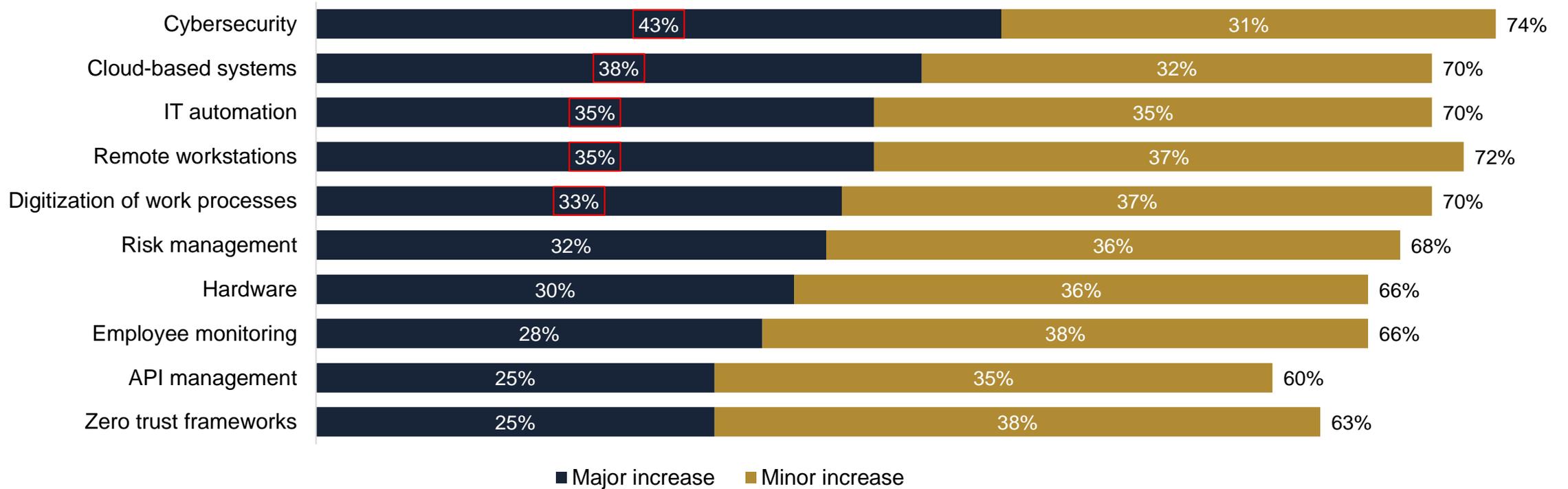
Events with Greatest Cybersecurity Challenges in Addressing New Ways of Working



Source: WSJ Intelligence & Forcepoint CEO & CISO Study, Winter 2021. Base: Total respondents n=508. Q14: Which of the following factors will present your cybersecurity team with the greatest challenges in addressing new ways of organizing work?

The Pandemic Drove Significant Financial Reallocations —Cybersecurity and Cloud Most Notably

Reallocation of Financial Resources Due to COVID-19

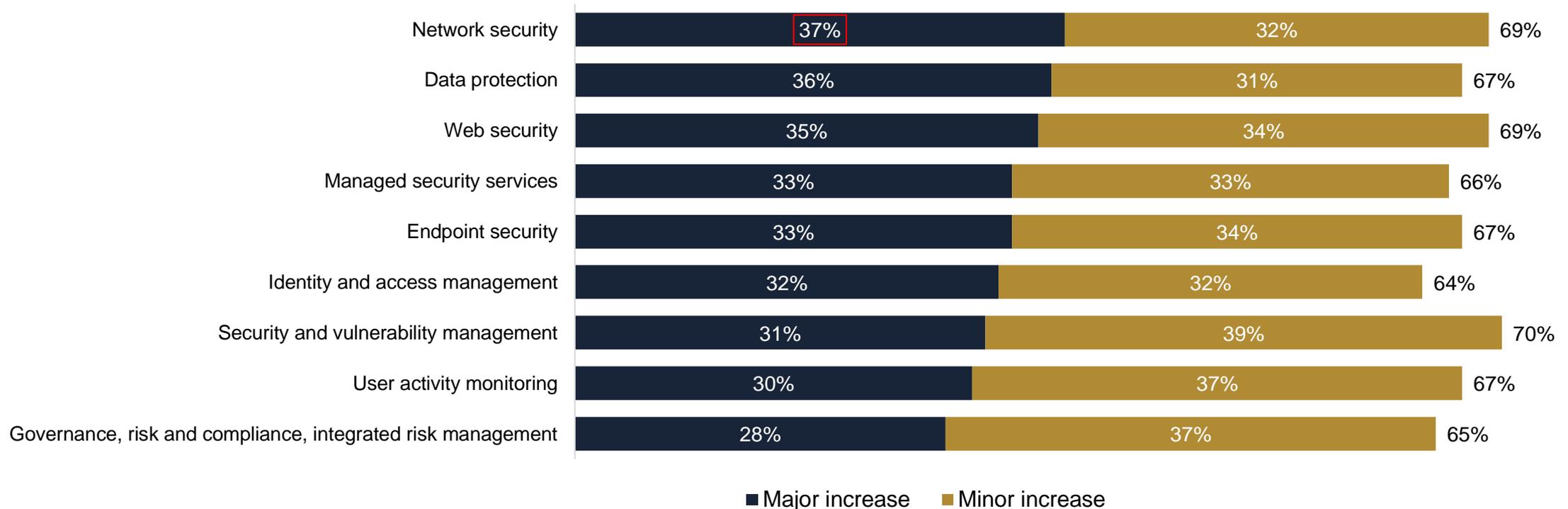


Statistically significant difference

Source: WSJ Intelligence & Forcepoint CEO & CISO Study, Winter 2021. Base: Total respondents n=508. Q7: To what extent has your organization reallocated financial resources to adapt the following elements of its IT infrastructure as a result of the COVID-19 pandemic?

Increased Spending on a Broad Range of Cybersecurity Strategies and Tools to Address Risks Brought on by COVID-19

Impact of COVID-19 on Cybersecurity Spending

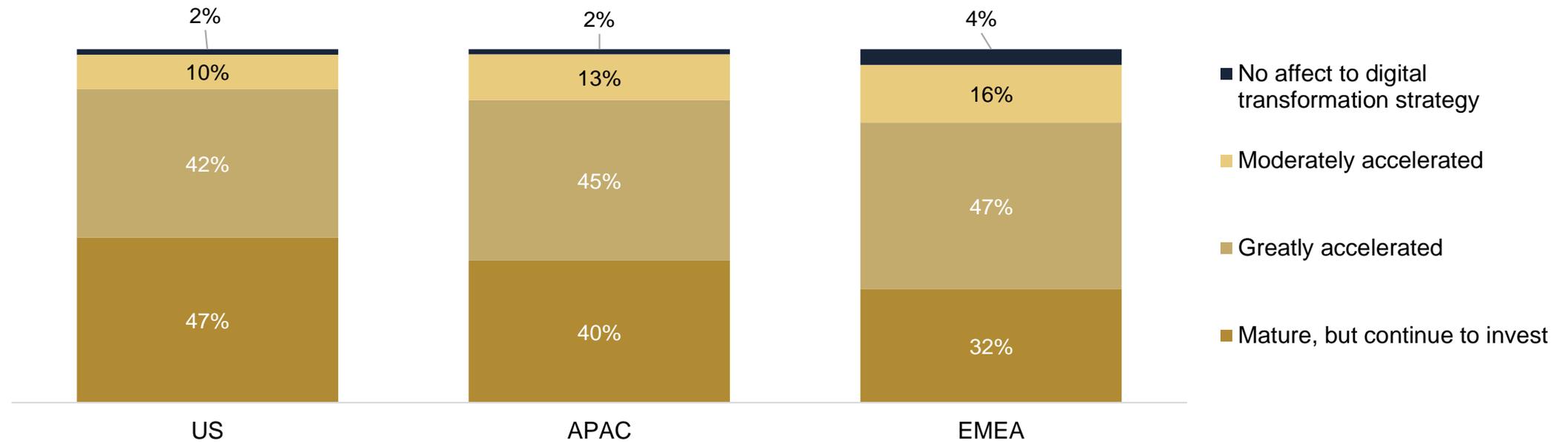


Statistically significant difference

Source: WSJ Intelligence & Forcepoint CEO & CISO Study, Winter 2021. Base: Total respondents n=508. Q11: To what extent did your organization's response to the COVID-19 pandemic impact spending on the following aspects of cybersecurity?

The Pandemic Accelerated Digital Transformation Strategies for All

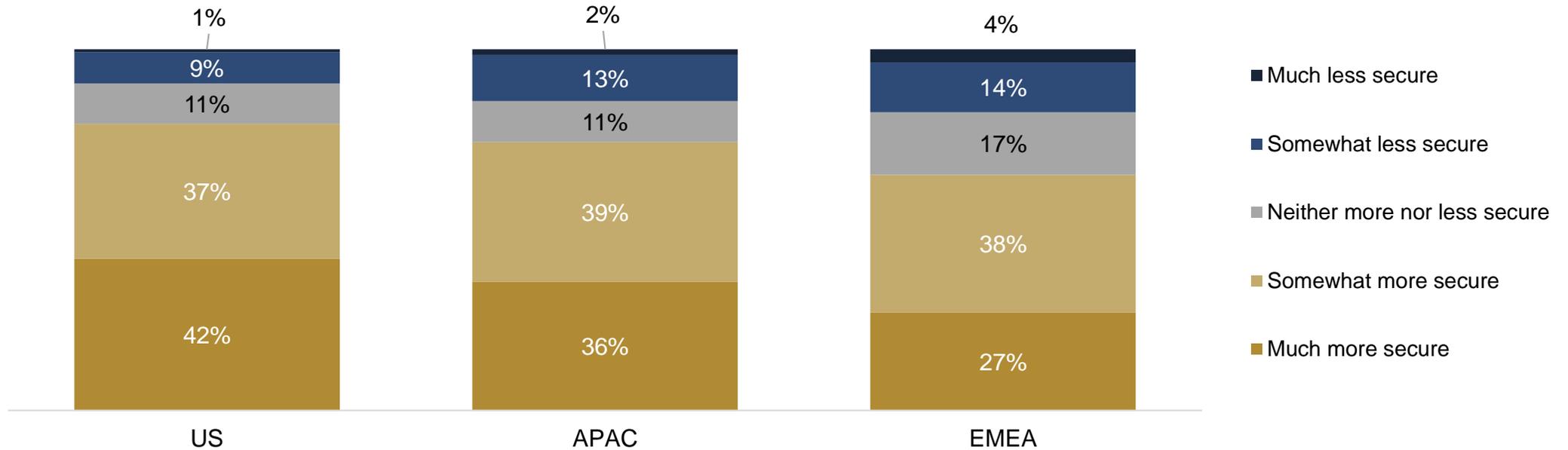
Impact of COVID-19 on Digital Transformation Strategies



Source: WSJ Intelligence & Forcepoint CEO & CISO Study, Winter 2021. Bases among those with opinion: US n=124, APAC n=132, EMEA n=246. Q6: Which of the following statements best describes the impact of the COVID-19 pandemic on the degree of digital transformation across your organization?

Operational Changes Brought on by the Pandemic Have Made Companies More Cybersecure

Cybersecurity Impacts from COVID-19-Based Operational Changes

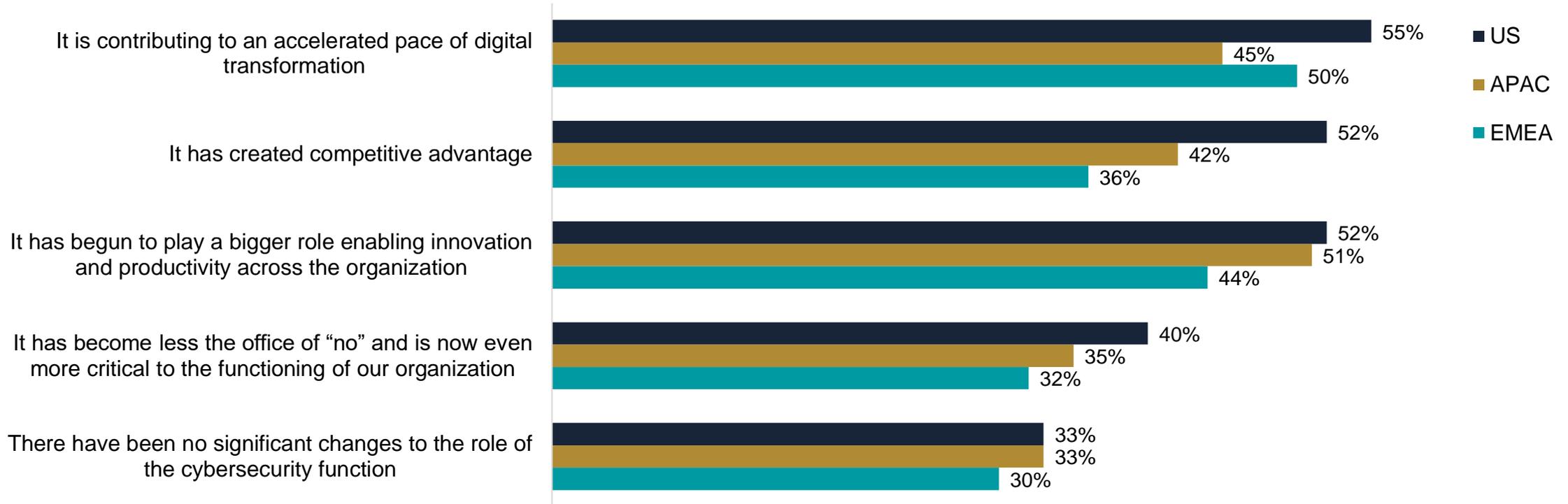


May not equal 100% due to rounding

Source: WSJ Intelligence & Forcepoint CEO & CISO Study, Winter 2021. Bases among those with an opinion: US n=126, APAC n=132, EMEA n=247. Q2: How has your organization's cybersecurity been impacted by operational changes implemented in response to the pandemic?

Two-thirds Agree Cybersecurity Contributed to Their Success by Accelerating Digital Transformation, Fostering Innovation and Creating a “Competitive Advantage”

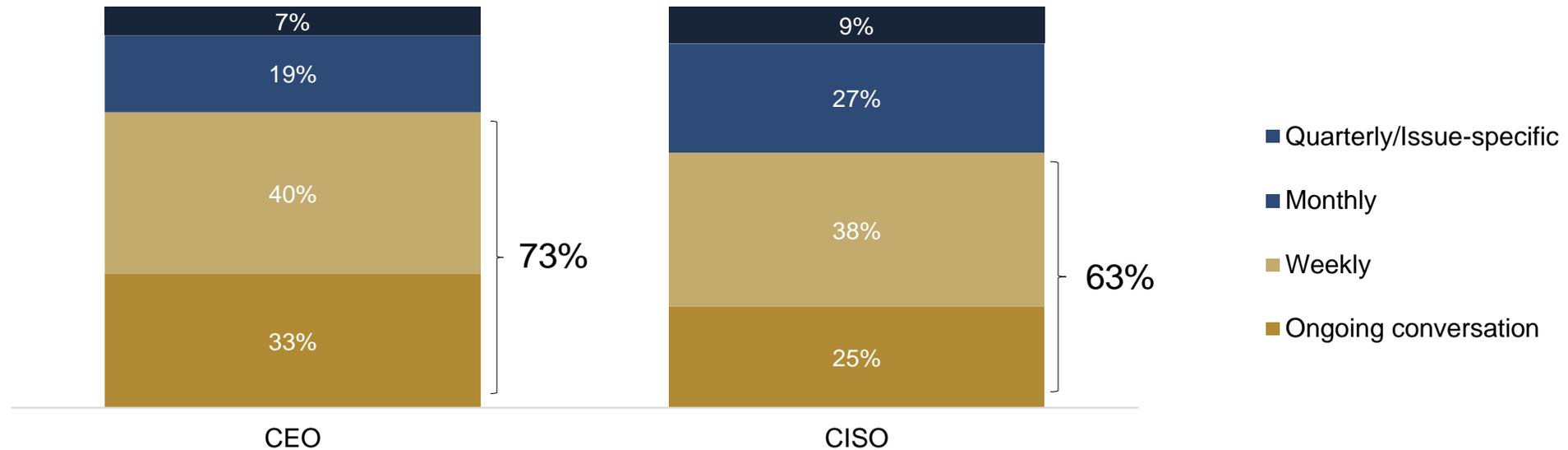
Cybersecurity’s Contribution to Company’s Success



Source: WSJ Intelligence & Forcepoint CEO & CISO Study, Winter 2021. Bases: US n=126, APAC n=132, EMEA n=250 Q4: Which of the following statements best describes the contribution of your cybersecurity function to your organization’s overall success?

CEOs Perceive a More Robust Dialog About Cybersecurity Strategy

Frequency of Cybersecurity Discussion Among Members of C-Suite and CISO

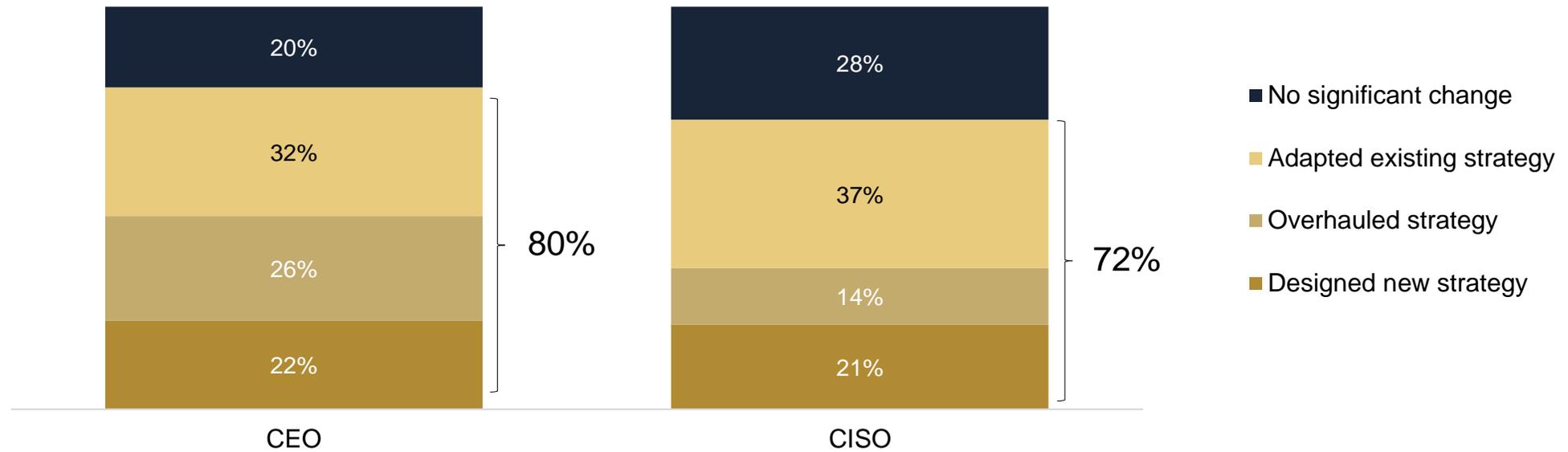


May not equal 100% due to rounding

Source: WSJ Intelligence & Forcepoint CEO & CISO Study, Winter 2021. Bases with formal cyber strategy; CEO n=227, CISO n=227. Q13: Which of the following best describes the frequency of conversations about cybersecurity between members of the C-suite and the CISO in your organization?

CEOs Perceive a More Extensive Change in Cybersecurity Strategy than CISOs

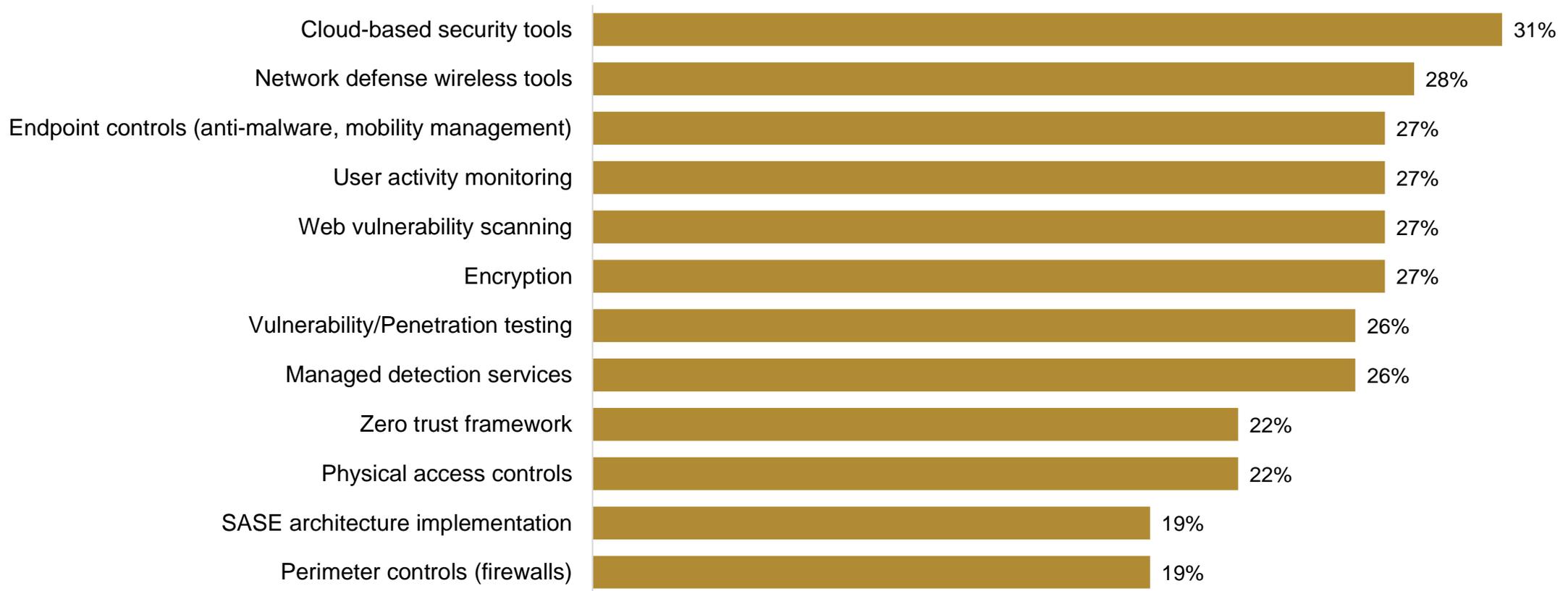
Impact of COVID-19 on Cybersecurity Strategy
(among those with a formal cyber strategy)



Source: WSJ Intelligence & Forcepoint CEO & CISO Study, Winter 2021. Bases: With formal cyber strategy; CEO n=227, CISO n=227. Q10: Which of the following best describes the overall impact of the COVID-19 pandemic on your organization's cybersecurity strategy?

Multiple Tools and Techniques Will Be Deployed to Ensure Long-Term Cybersecurity

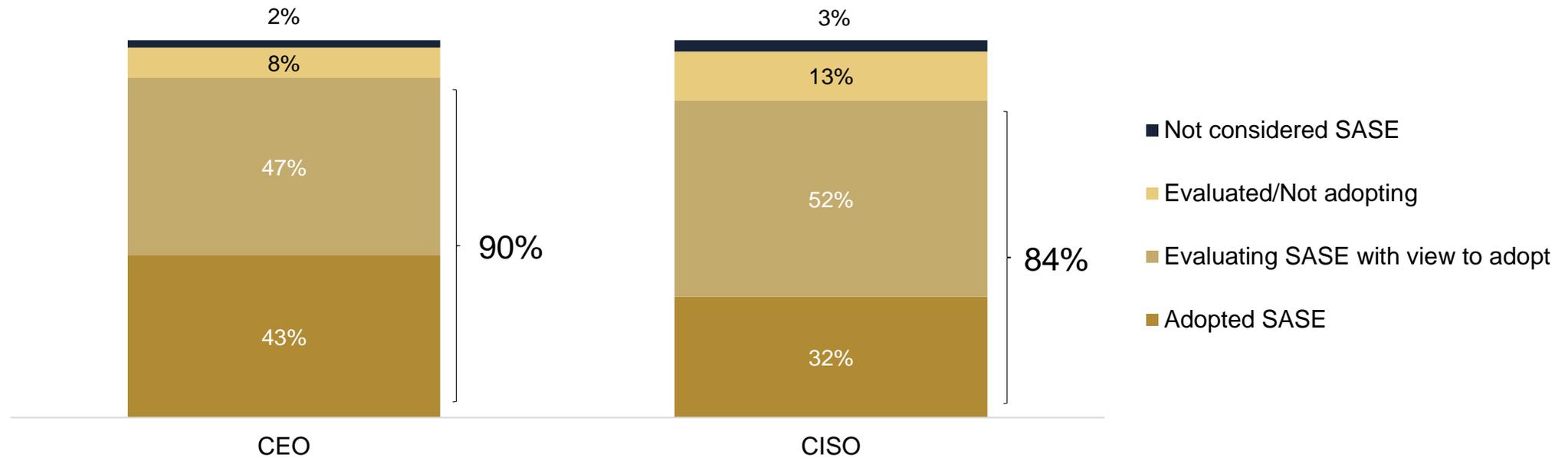
Most Important in Addressing Cybersecurity Within Changing Nature of Work



Source: WSJ Intelligence & Forcepoint CEO & CISO Study, Winter 2021. Base: Total respondents n=508. Q15: Which of the following tools and techniques will be most important for your organization's cybersecurity team in addressing changes in the organization of work?

Both CEOs and CISOs Are Bullish on SASE

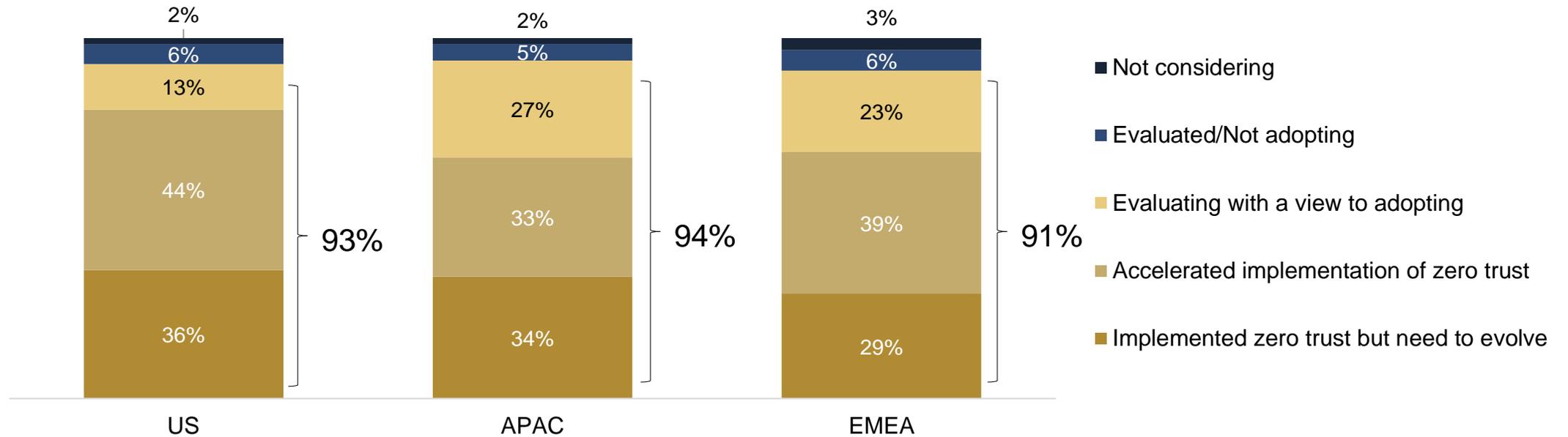
Organization's Views on SASE



Source: WSJ Intelligence & Forcepoint CEO & CISO Study, Winter 2021. Bases: Have opinion on SASE; CEO n=252, CISO n=248. Q17: Which of the following statements best describes your organization's views concerning the Secure Access Service Edge (SASE) security model?

Near Universal Adoption/Interest in Zero Trust Frameworks

Organization's Views on Zero Trust



May not equal 100% due to rounding

Source: WSJ Intelligence & Forcepoint CEO & CISO Study, Winter 2021. Bases: Have opinion on zero trust; US n=126 APAC n=130, EMEA n=244. Q18: Which of the following statements best describes your organization's views concerning zero trust?

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