

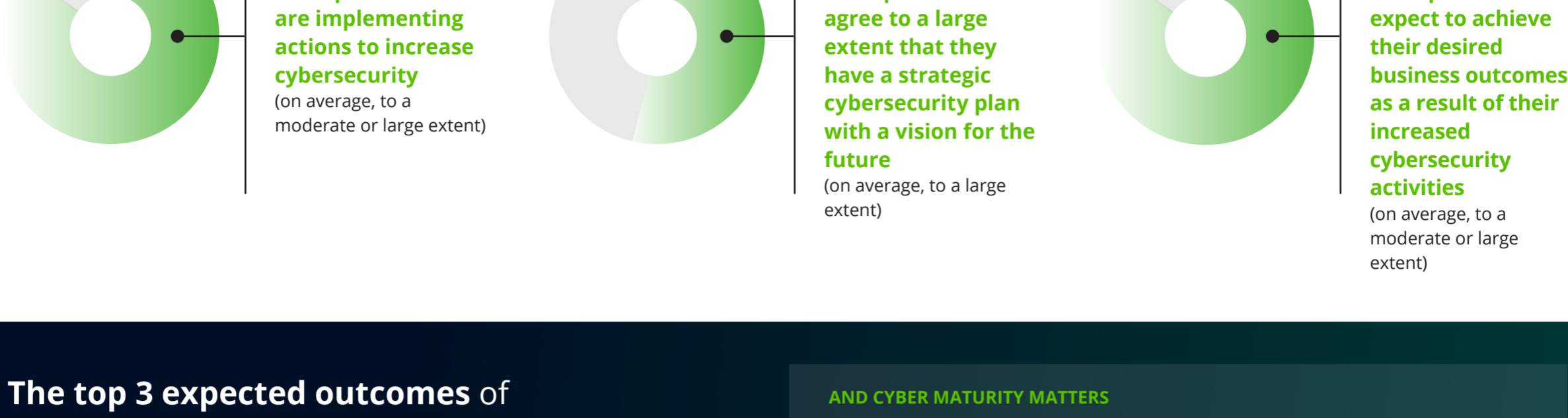
UNLEASHING THE PROMISE OF CYBER

The link between cybersecurity and business value is growing stronger, according to insights from the fourth edition of Deloitte Global's Future of Cyber Survey.* It asked nearly 1,200 cyber decision-makers across the world, including 203 in the US, to share their views on the evolving cybersecurity landscape and how their organizations are responding.

HERE ARE SOME KEY INSIGHTS FROM THE US DECISION-MAKERS SURVEYED...

CYBERSECURITY CONTINUES TO GROW AS AN ESSENTIAL COMPONENT OF THE ENTERPRISE.

In addition to cyber strategy being a critical component to unlocking greater business value, cybersecurity has become increasingly integrated into technology transformation activities.



The top 3 expected outcomes of cybersecurity initiatives

1. Improving threat detection and response (57% of US respondents indicated to a large extent, which is 13% above the overall global benchmark)
2. Protecting intellectual property
3. Increasing efficiency and agility

AND CYBER MATURITY MATTERS

23% Organizations classified as having high cyber maturity** are more likely to expect to achieve their business outcomes by 23 percentage points versus overall

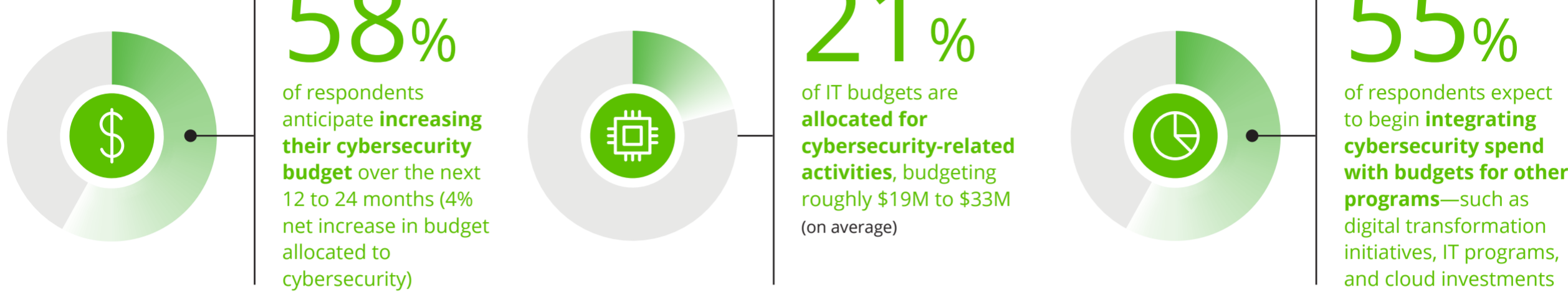
Top 3 cybersecurity strategies being employed

1. Have a governing body comprising senior business and IT leaders to oversee cybersecurity capabilities and investments
2. Use cybersecurity maturity assessments to guide investment decisions
3. Partner with trusted providers to deliver specific cybersecurity outcomes or to operate key capabilities

Top 3 strategic challenges

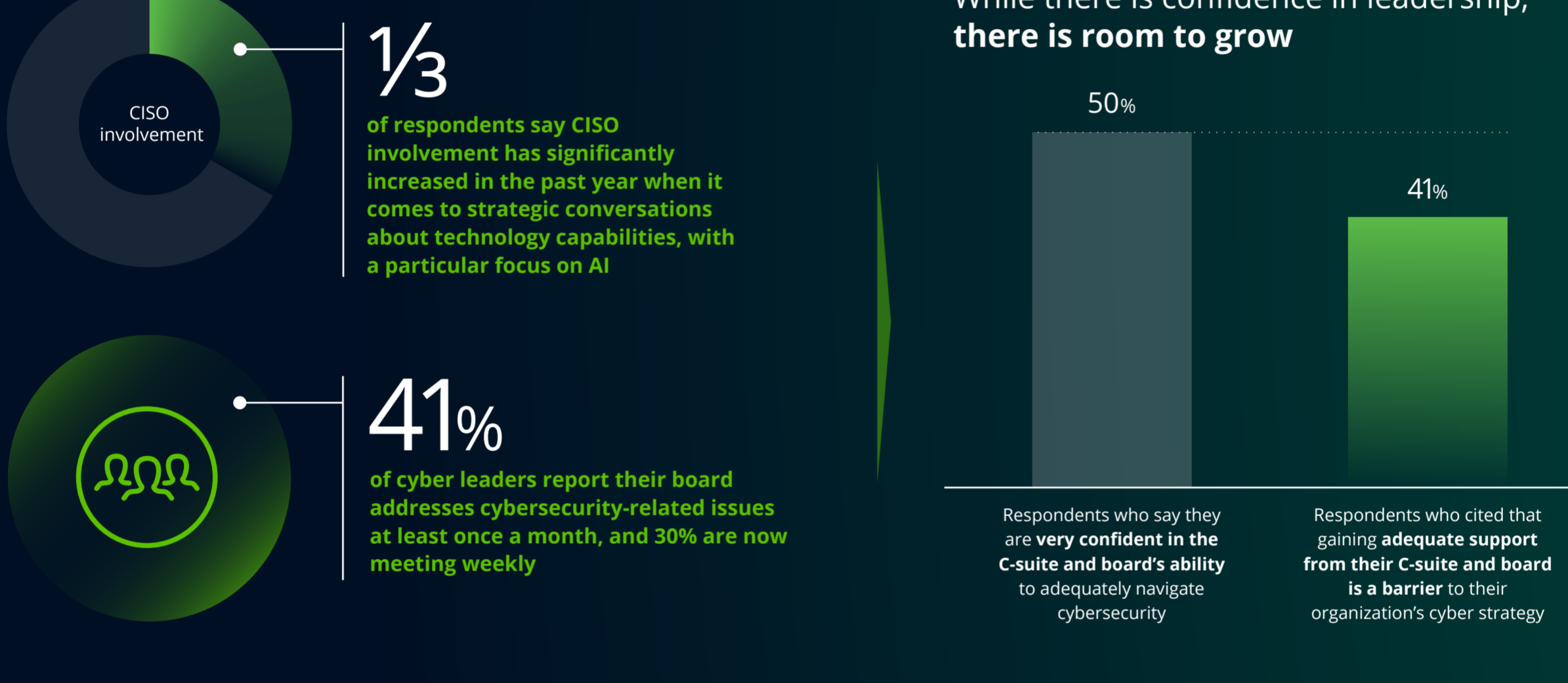
1. Complying with complex and dynamic regulatory requirements
2. Keeping pace with the rapidly evolving cyber threat landscape
3. Gaining adequate support from the C-suite/board

CYBERSECURITY BUDGETS ARE GROWING AND ARE INCREASINGLY INTEGRATED WITH OTHER PROGRAMS.



While 41% report that securing the necessary budget is a barrier to their cyber strategy (on average, to a large extent)

THE INFLUENCE OF THE CHIEF INFORMATION SECURITY OFFICER (CISO) IS GROWING ACROSS AN INCREASINGLY CYBER-SAVVY C-SUITE.



AS THEY SEEK TO AVOID THE IMPACT OF CYBERSECURITY INCIDENTS, ORGANIZATIONS' PRIORITIES ARE CHANGING.

Top negative consequences reported by respondents in which they have been impacted to a large extent:

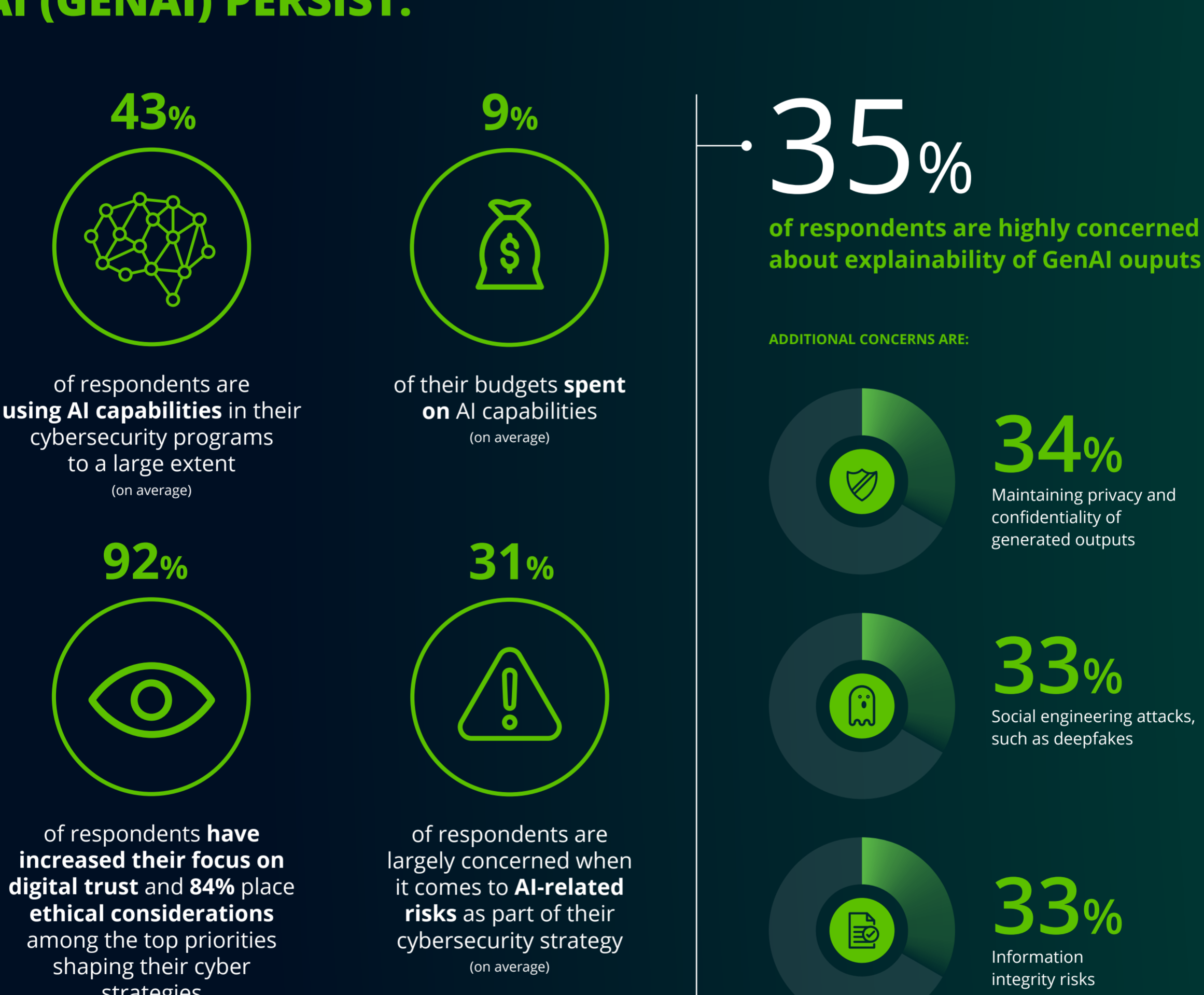
1. Operational disruption, including supply chain or partner ecosystem
2. Intellectual property theft
3. Reputational loss
4. Defunding of strategic initiative
5. Negative talent recruitment/retention

TOP THREAT ACTORS

Almost half of respondents have reported at least one cyber breach within the last year.

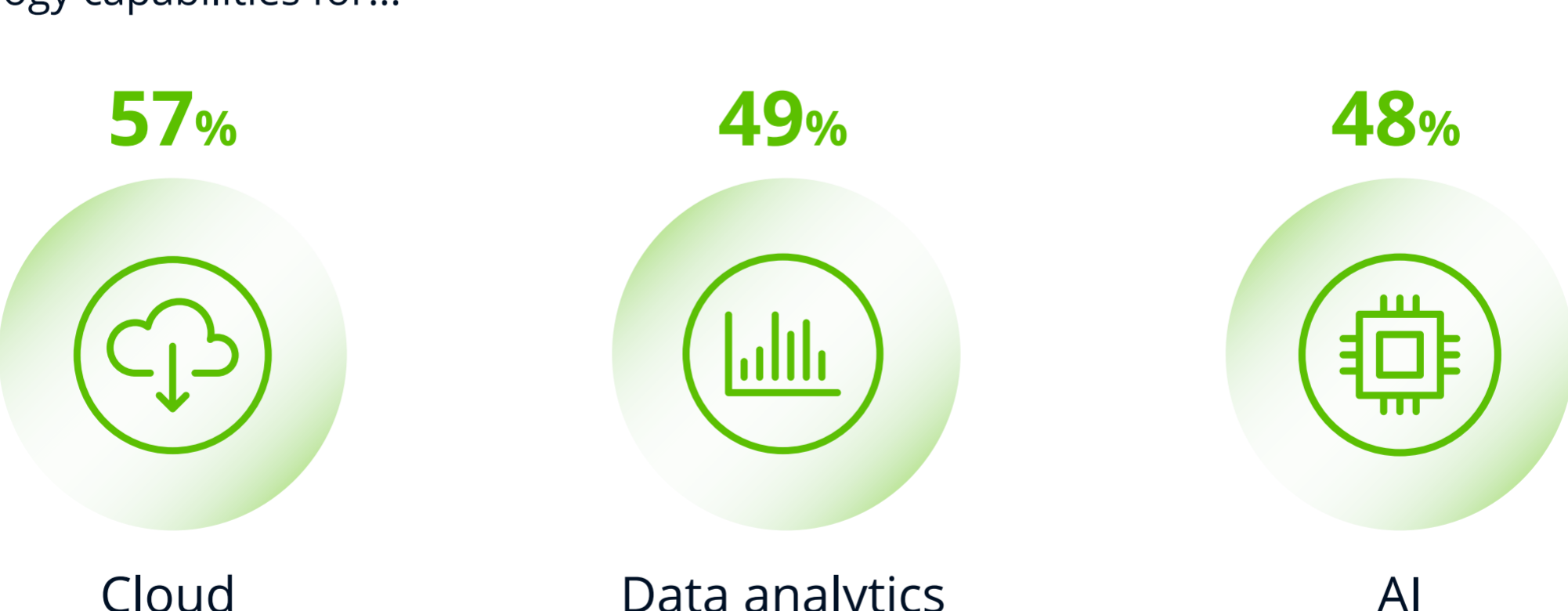


INCREASINGLY, ORGANIZATIONS ARE USING AI CAPABILITIES TO IMPROVE THEIR CYBERSECURITY PROGRAMS. HOWEVER, CONCERNS WITH GENERATIVE AI (GENAI) PERSIST.



CYBERSECURITY IS KEY TO DRIVING TECHNOLOGY INVESTMENTS.

Percentage of respondents who say cybersecurity plays a large role in securing investment in technology capabilities for...



MORE IMPACT WITH CYBER MATURITY 2.4x US organizations with high cyber maturity** are 2.4 times more likely to say cybersecurity plays a large role in securing technology investments (on average, compared to organizations with low cyber maturity)

Explore additional insights from the survey at deloitte.com/global/future-of-cyber

Reach out to discuss

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*Find the Global Future of Cyber Survey at deloitte.com/global/future-of-cyber. **Organizations with high cyber maturity are defined as the 14% of US respondents who scored the highest, based on their responses against a set of cyber and AI maturity actions asked about within the survey.