

# 2020 CYBERSECURITY MID-YEAR MARKETING SNAPSHOT

How Cybersecurity Marketers Have Adjusted To COVID-19



# KEY INSIGHTS



**Cybersecurity markets are growing fast in the pandemic.**

**The overall market is growing at a rate of 2.5% while IT spending is down 8.9% The early winners are vendors in the SD-WAN space who are up 57.5% YOY in Q1, SaaS Secured Gateway, up 14.6%, ATP up 12.6%, eMail Security up 8.4% and even Firewall spending was up 3%.**

**Our findings suggest that to leverage this growth in the second half of 2020, marketers should:**

- 1) Use data-driven content analytics methods to increase share of voice and to develop more effective new content**
- 2) Ensure consistent messaging with a clear, differentiated value proposition and supporting evidence, avoiding 'me too' themes**
- 3) Enhance pipeline velocity and yield with creative tactics that replace in-person events and face-to-face client meetings**
- 4) Drive higher branding impact by optimizing advertising strategies toward retargeting and more personalized campaign journeys**
- 5) Shift content toward platform-optimized video with direct, pointed messaging that delivers value quickly**

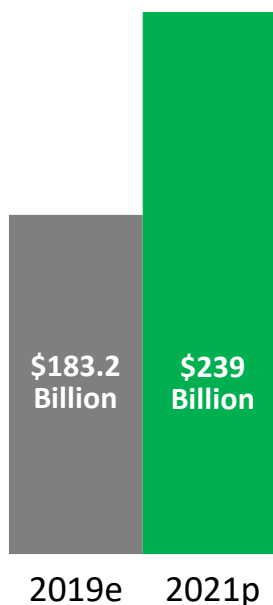
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**An update on challenges, focus and spend in Cybersecurity Marketing to Consider for H2 2020 & beyond**

## The Impact of COVID-19 on Cybersecurity Markets: Accelerated Growth



- The global impact of C19 on Cybersecurity markets is expected to grow from \$183.2B in 2019 to \$239B by 2021, at a CAGR rate of 12%
- The growth can be attributed to increasing focus on securing remote infrastructure and enterprise IP due to WFH and remote worker populations
- Increasing focus on Cybersecurity as a key business imperative and not just as a support function is expected to drive the market with higher wallet share for security policy, technologies and infrastructure

e: estimated – p: projected

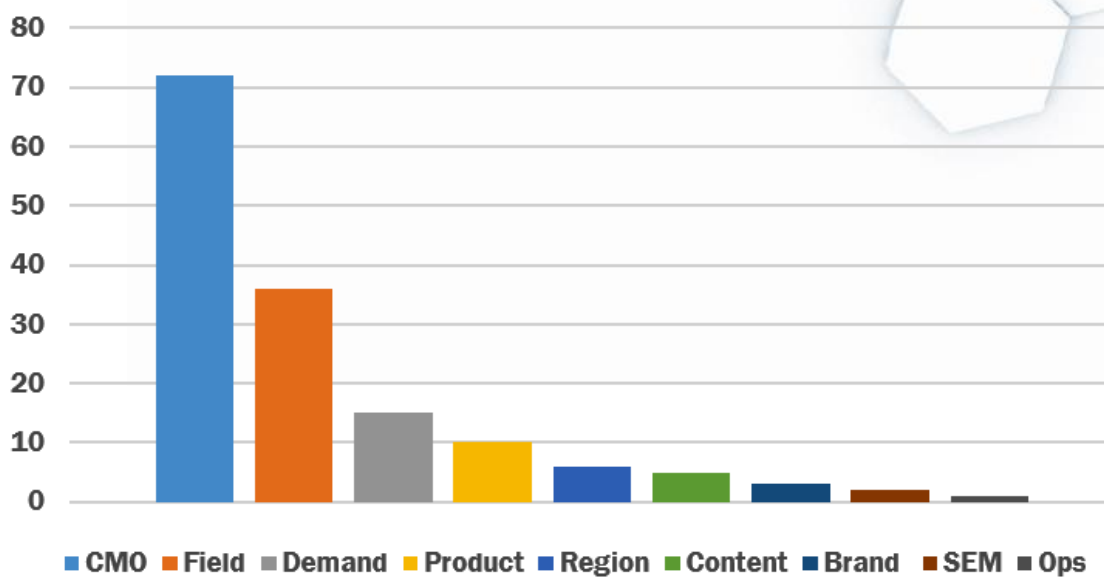
Source: Secondary Research, Expert Interviews, and MarketsandMarkets Analysis

# SURVEY METHODOLOGY

The results in this report are compiled from field interviews with over 150 cybersecurity Marketing Professionals representing a range of vendors from very mature through early stage. These began at RSAC in February and continued through June 2020. Interviews were supplemented by secondary research and MarketsandMarkets data to benchmark actual activity from 1H 2020 vs. expectations for 2H 2020.

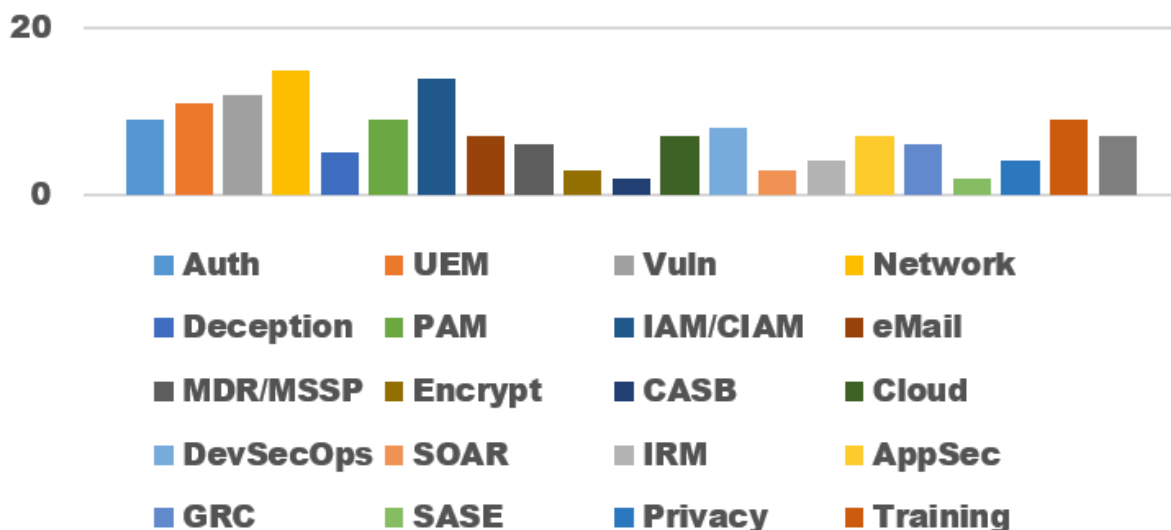
Offering a balanced representation of the Cybersecurity Marketing mindset, the largest segment of survey respondents (72%) describes their job function as Chief Marketing Officer. The next largest segment is Field Marketing Director at (36%) followed by Demand Generation at (15%).

## Roles | Function



Respondents represented companies in UEM, Authentication, Vulnerability Detection, Network Visibility, Deception, PAM, IAM, email Security, MDR, MSSP, CASB, Cloud, DevSecOps, SOAR, IRM, AppSec, GRC, SASE, CIAM, Privacy, Awareness Training, IoT, IIoT, Blockchain, and Encryption sectors.

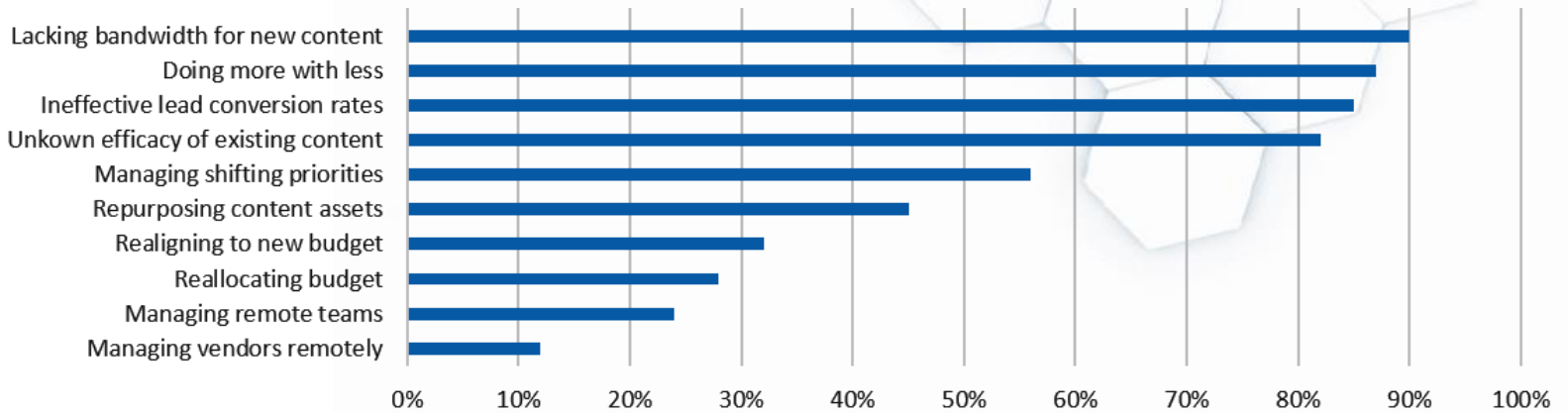
## Categories



# PANDEMIC EFFECT

Field interviews began in February. All respondents completed the follow-on survey in June. With most remote work mandates beginning in the last two weeks of March, all respondents had been directly involved with re-allocating cybersecurity marketing budgets and programs for three months when the survey was completed. Challenges cited:

## Biggest Challenges Faced During the Pandemic



### A Top Challenge: Content

Content turned up large in most of the interviews and survey results. Many marketers experienced a staff reduction immediately following the outbreak and most of the first resources furloughed were content creators. Doing more with fewer resources was the second biggest challenge (87%).

As a consequence of early staff reductions, content creation suffered and led the list of challenges (90%).

45% said that attempts at repurposing existing content assets were frustrating because there was no measurable way to determine the efficacy of the content in the market (82%). Read more insights around content challenges on page 8.

### Budgets and Priorities

The need to manage shifting priorities ranked fifth among challenges (56%) as physical events became a waterfall of cancellations through the first half of 2020, and vendors scrambled to redirect marketing spend toward virtual events.

Realigning (32%) and reallocating budgets (28%) occupied much of the stress curve as marketers rushed to find virtual event providers and book their spots, to ensure pipeline build and progression continuity in coming quarters.

# LEAD CONVERSION

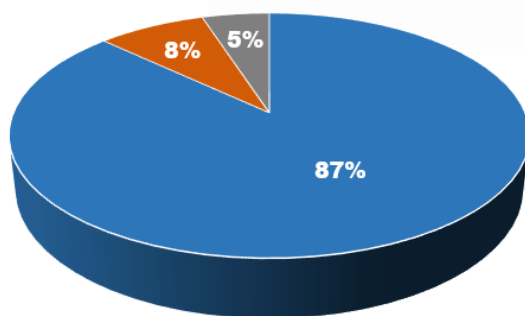
## Lead Conversion Rates: Top Priority in February

As the Pandemic began to establish a foothold during February, 100% of the 150 marketers in initial field interviews cited lead quality or lead conversion rates as their top priorities. That was corroborated by survey results in June that held poor lead conversion as the 3<sup>rd</sup> largest challenge behind low bandwidth and the challenge of creating content with fewer resources (85%).

In this context, lead conversion rate is defined at two levels. The first level is the rate at which a website visitor becomes a lead, essentially by filling out a form to share their contact information with the understanding that you will continue to market to them (raw MQL). The second level is the rate at which a raw MQL turns into an SQL through BANT qualification, validating intent and nurturing.

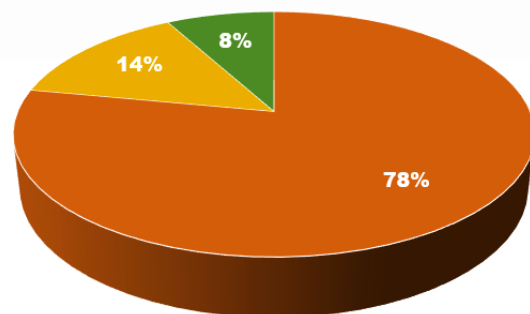
### RAW MQL CONVERSION RATES

■ Below 5% ■ Between 5 - 10% ■ Above 10%



### MQL:SQL CONVERSION RATES

■ Below 5% ■ Between 5 - 10% ■ Above 10%



We found, at both RSAC and through our June survey data, the Raw MQL conversion rates through content syndication driving to landing page registration for downloads averaged less than 5% in 87% of the cases. 8% experienced Raw MQL conversion rates of between 5 – 10% averaging at 6%. Finally, 5% experienced Raw MQL conversion rates above 10% but those 7 companies averaged 12% and all reported using a heavy dose of retargeting campaigns running concurrently alongside the syndications.

In the case of MQL to SQL conversion rates, the majority (92%) reported rates below 10% and the 8% who experienced higher rates averaged 13%.

The consensus among Cybersecurity marketers is that the intensity and volume of noise against a relatively small targeted audience (InfoSec practitioners) prevent greater conversion success. Our data suggests that the relevance of the content used in lead syndication campaigns has a significant impact on lead quality.

Content that is direct, pointed and easily consumed, combined with intent validation will measurably improve overall campaign performance.

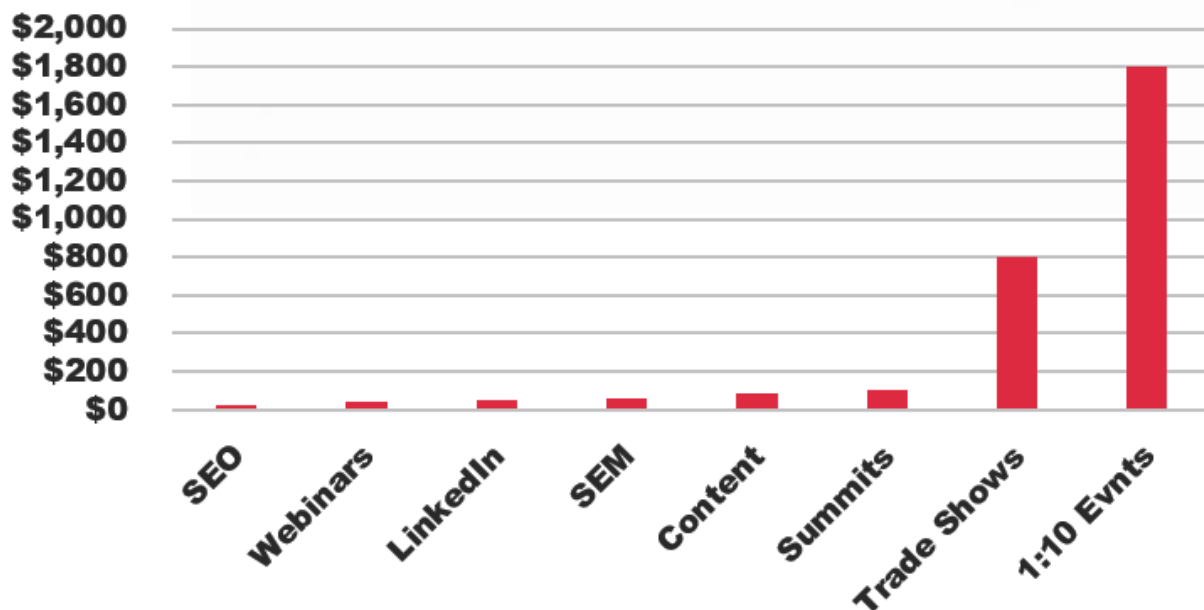
# LEAD CONVERSION

## Raw MQL Lead Costs

With the absence of physical events such as conventions and trade shows, the cost per Raw MQL lead has fallen from the \$2,500cpl average from a physical event like RSAC to the more reasonable average of \$811cpl at a virtual trade show according to our survey data. According to CEIR research, it costs \$2,188 to close a sale with a conventional trade show lead.

Today's virtual events range from summit sponsorship fees of \$100cpl to more intimate roundtable events where targeted executive attendees are accessible to marketers on a 1:6 – 1:10 basis, resulting in CPLs ranging from \$1,450 to \$2,500, with commensurately higher close rates.

## Lead Costs



## MQL to SQL to Closed Deal Lead Costs

Implisit and Salesforce analyzed the pipelines of hundreds of companies and found that the average conversion rate from all Lead types to Opportunity (another way of saying MQL to SQL) was 13%.

At a 13% conversion rate, if the average CPL is \$198, the average cost of an SQL would be \$1,523. In that same study, Implisit found that the SQL to Customer conversion rate averaged 6%.

This means that the average marketing cost of a lead journey to closed deal is \$25,383. Our survey found that if an MQL converted to an SQL at a 30% rate, the ROI would be impacted by a factor of 5, or a lowering of the customer conversion cost to \$5,077 - an achievable goal with relevant targeted content and an enhanced lead generation program that validates intent.

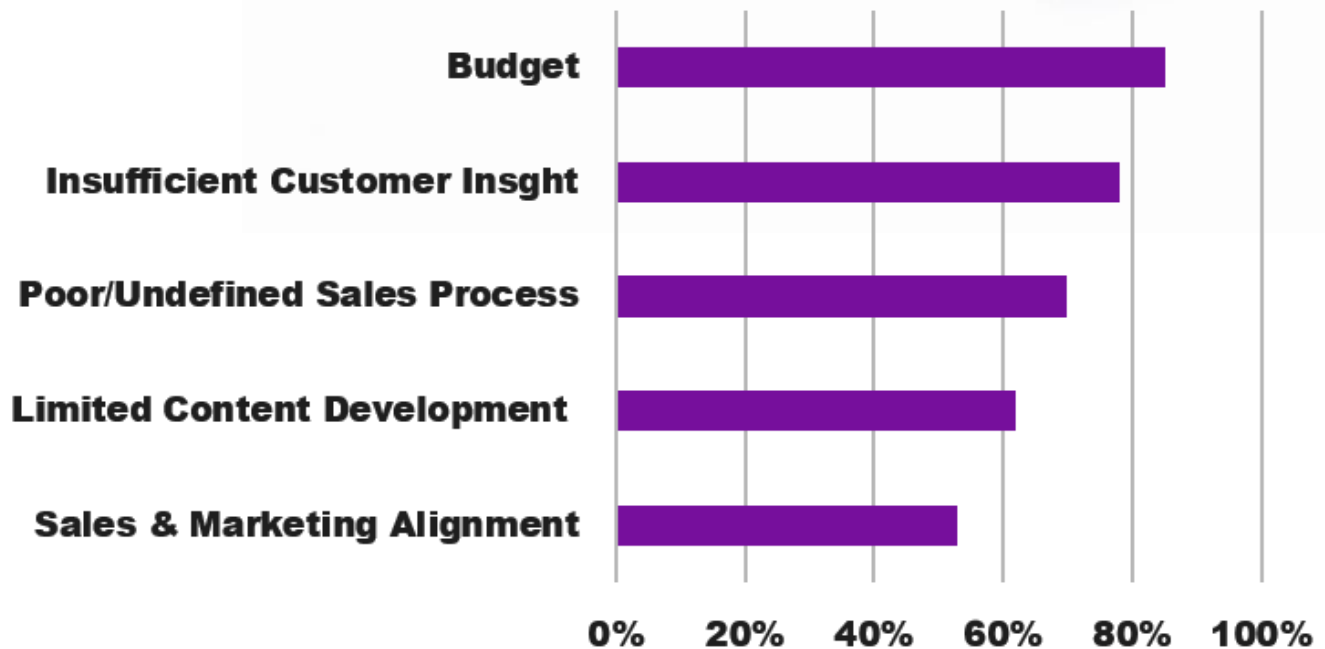
# LEAD CONVERSION

## Lead Quality

Survey data also suggested that while budget had the greatest impact on lead quality (85%), the combination of limited customer insight (78%) with an under-optimized sales process (70%) and a lack of compelling content (62%) had a much greater impact on lead quality than budget alone.

In fact, when we factor in the combined challenges of a misaligned sales and marketing model, the sum of those factors likely outweighs budget restrictions by as much as 4x.

## Impact on Lead Quality



Insufficient Customer Insight in this context means an inability to see into the lead generation and progression process; assess the efficacy of messaging, content, promotional results and nurturing; and evaluate how each impacts conversion.

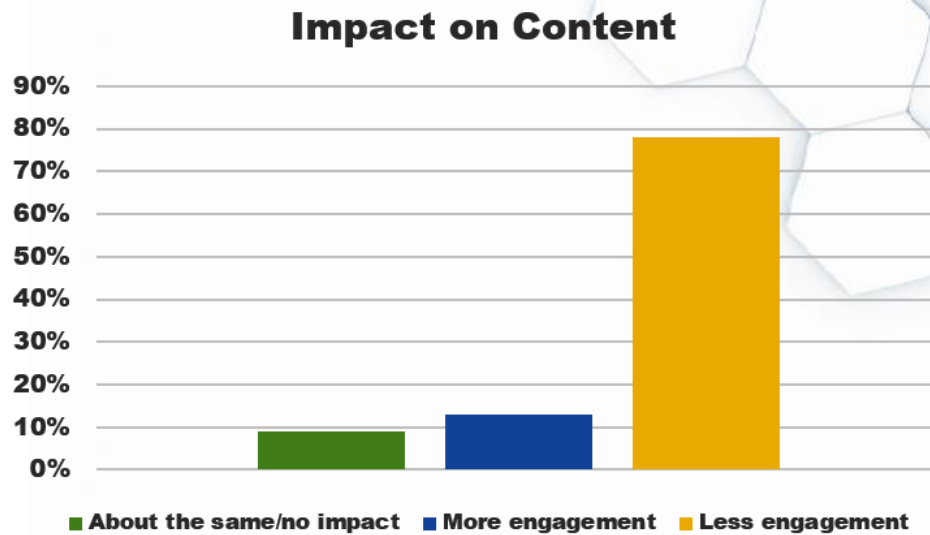
A Poor/Undefined Sales Process was cited by 70% of surveyed marketers, who frequently reported long lead times between lead generation and SDR contact, unnecessarily reducing momentum and conversion, and delaying the initiation of lead nurturing.

In short, we found that the combination of these adjacent factors was impacting lead efficacy far more than budgetary restraints, while ironically contributing to higher lead conversion costs.



## Content Efficacy

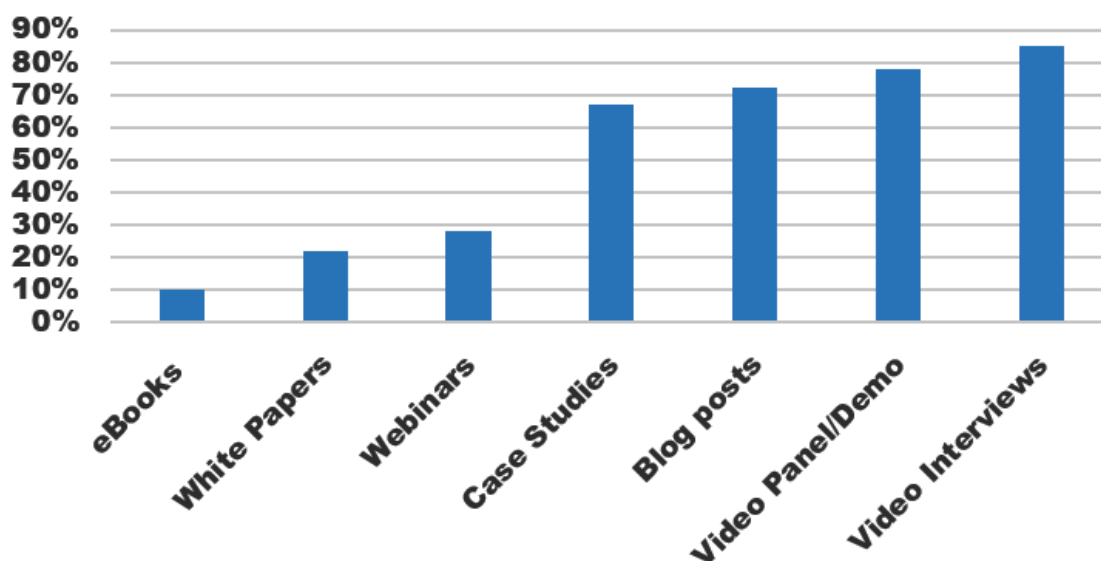
The Pandemic's impact on content efficacy has been substantial. The conventional metrics for brand awareness, engagement and lead generation have been skewed by the shift to the new WFH normal. Most respondents (78%) claimed that they were experiencing less content engagement after C-19 than before.



Conventional metrics like page-views, downloads, web-traffic, likes/shares, comments and similar metrics continue to provide some insight into engagement, but fail to provide actionable insights into competitive performance and cannot identify gaps in topical coverage. With reduced staffing resources, the ability to review and audit content performance has diminished substantially.

Consistent with that hypothesis is data that suggests brief and highly-focused content, like case studies, is more effective during the pandemic than longer, more densely-drawn content, like eBooks, white papers, extensive research, which requires more time and greater attention to consume. And video consistently outperforms everything.

## Content Engagement Under C19



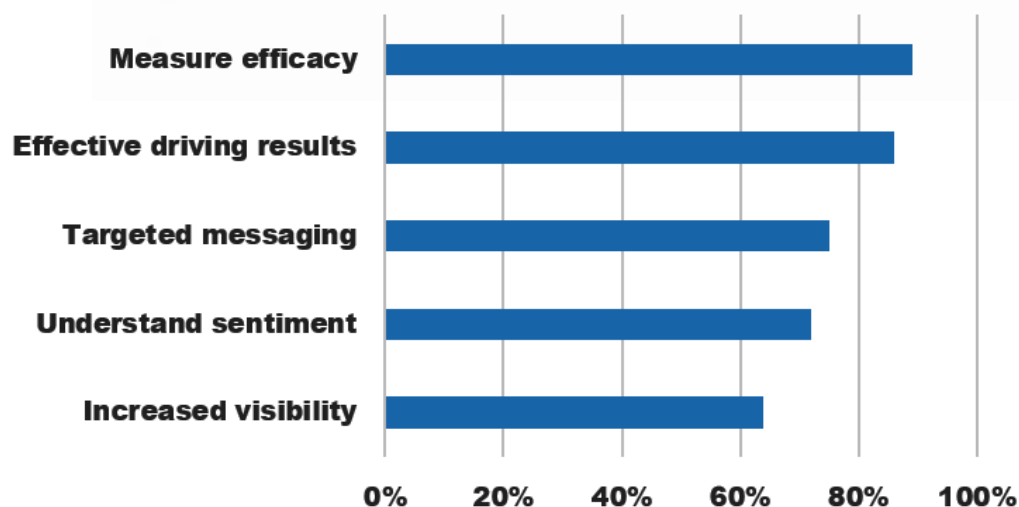
## Data Strategies

The pandemic has had a measurable impact on data strategies. The new normal WFH environment combined with an onslaught of continuous information has elevated emotions and affected trust.

Cookies are disappearing. Privacy regulations are expanding. It's significantly more difficult now for brands to use third-party data sources to gain insight about existing customers and to outreach to new prospects.

Cybersecurity marketers in our survey stated that first-party data use is one of the biggest drivers of effective marketing results (86%), and many plan to leverage first-party data during the second half of the year to better understand customer sentiment and target prospects as the pandemic drags on (72%).

### First-Party Data Benefits



At the same time, we found that only a fraction of marketers (5%) use first-party data for 'multi-moment' marketing - the ability to deliver relevant experiences to customers at multiple moments across the buyer's journey - even though studies like Salesforce's 2019 ["State of the Connected Customer" survey](#) have shown that the approach achieves cost savings of up to 30% and revenue increases of as much as 20%.

This is an opportunity Cybersecurity marketers can leverage to expand results. First-party data coupled with intent layers, based on topical searches, becomes invaluable during this era where WFH obfuscates reverse IP mapping. Home-based IP addresses don't map to the prospect companies' IP address, so what used to be possible when prospects were conducting research from work office locations, no longer works.

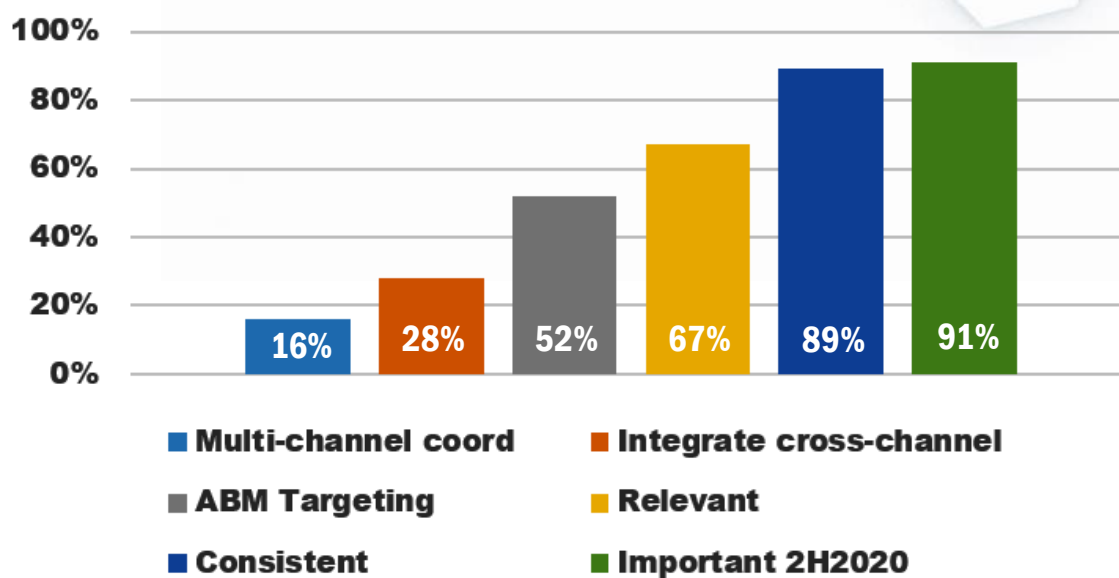
This is especially relevant in conducting Account Based Marketing (ABM) campaigns as regardless of the hybrid WFO model we presume post-pandemic, first-party data must take the place of IP addresses for ABM campaigns to be effective.

## First Party Data and Intent

Our survey found that a somewhat small percentage use first-party data for multichannel coordination (16%), but less than a third claim to be consistently effective at accessing and integrating data across channels (28%).

A significant majority (91%) agreed that first-party data would continue to become important to successful customer outreach during the second half of the year and cited reasons including ABM targeting (52%), relevance (67%), and consistent quality given that the data originates at the source (89%).

### First-party Data Impact



Marketers we interviewed (52%) also indicated that intent data should shorten the sales cycle and identify buyers with demonstrated interest. While intent data can certainly signal which buyers are most likely to act, if it isn't used in a well-planned multi-touch campaign, it loses its potential effectiveness.

7 in 10 agreed that intent data can also provide very precise data points that can be leveraged for targeted advertising strategies, improved long-tail keywords, and automated advertising campaigns.

Yet, we found that only 4 in 10 were using intent data and only half reported plans to use it in the second half of 2020.

Our conclusion: there is broad agreement that first-party data is essential to reaching and connecting with a sheltered audience and is considered a critical element in ABM marketing campaign effectiveness going forward. Yet survey results also show that most marketers aren't currently leveraging first-party data effectively, offering an untapped resource for improved results.

# MESSAGING



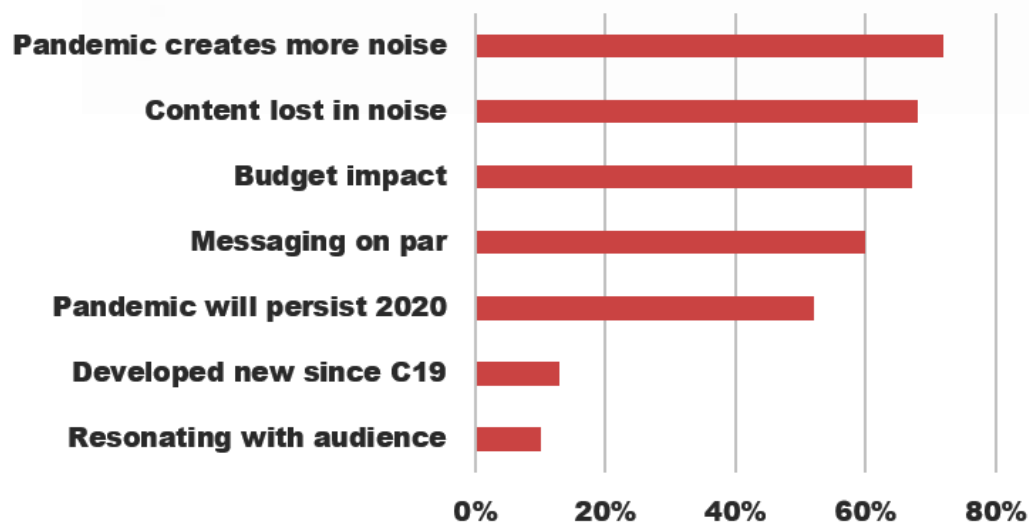
## Messaging Impact

Under the present conditions, authentic messaging is becoming increasingly important. Dramatically increased email marketing volume is saturating the average inbox and programmatic retargeting is flooding targeted personas with me-too messages that are indistinguishable from each other.

Today's CISOs and senior InfoSec practitioners are overwhelmed with inbound messaging and their email boxes are flooded with outreach by an unprecedented volume of SDR/BDR attempts to capture attention.

With 2,000+ product and service vendors in the cybersecurity space competing for attention amid buyers working from home, messaging quality and content resonance are more important than ever.

### Impact on Messaging



In our survey, we found that 3 in 5 marketers believe that their messaging is on par with that of their competitors, yet only 10% believe their messaging is resonating with their audience.

Most survey respondents claim that budget and staff cuts have affected their ability to create new content (67%) and to properly identify appropriate personas, while even more believe their current messaging is getting lost in a sea of noise (68%).

72% of those surveyed believe that the pandemic has contributed to an overall increase in messages and content promotion and over half believe that the effects of the pandemic will persist through the remainder of the year (52%).

An increased focus on refreshing existing content, and auditing current messaging for authenticity while emphasizing targeted outreach, may be the most efficient way to balance limited resources with improved results for the second half of 2020.

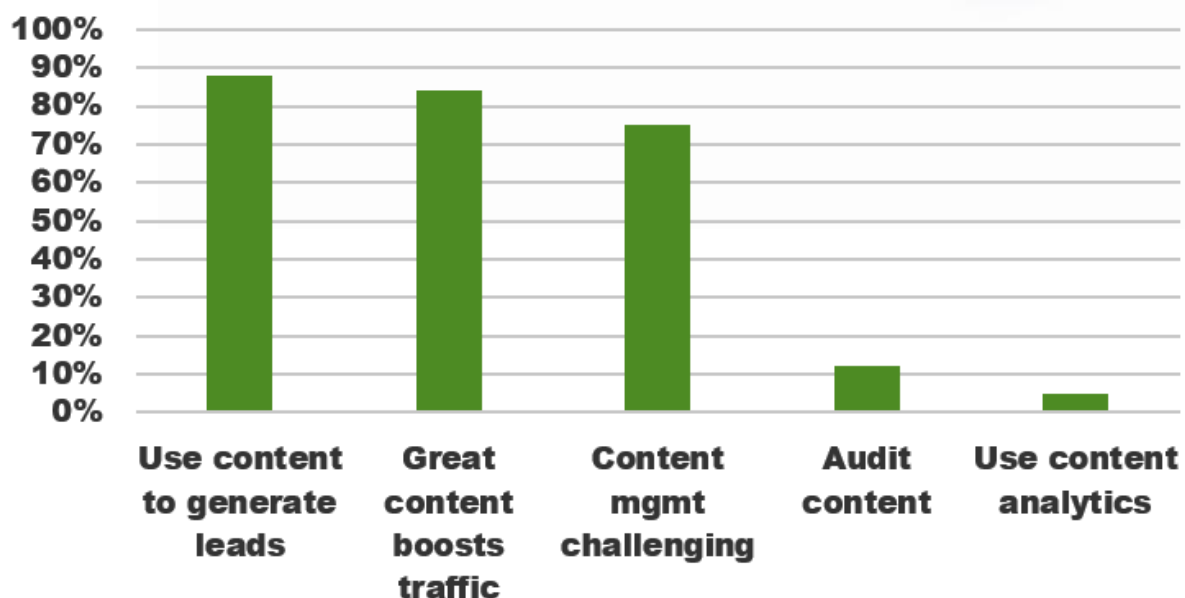
# CONTENT IMPACT

## Content Leverage and Analytics

It is not just the content that a Cybersecurity vendor creates around their solutions that impacts brand authority and ultimately lead generation, it is also the content topics with which vendors align that can impact the efficacy of their content in their target markets.

We found that 88% of Cybersecurity marketers use content marketing as a lead generation tactic but fewer than 29% believe they understand whether their content is resonating with their audience.

### Content Impact



84% believe that great content boosts traffic by over 300%, and 75% say managing auditing, evaluation, assessment, creation and sequencing is a challenge that is particularly difficult during the pandemic.

Interestingly, only 12% actually audit their content and only 5% have used or plan to use content analytics during the remainder of the year.

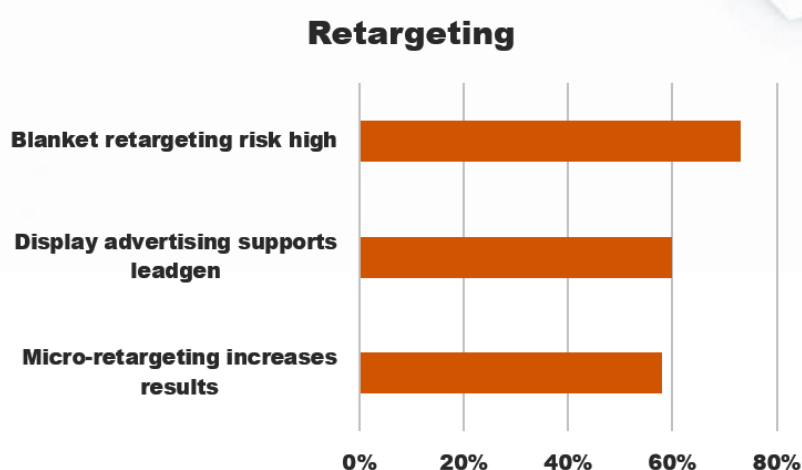
This is surprising in light of the fact that more than 8 in 10 marketers believe great content boosts leads by over 300%. There appears to be a disconnect between the ROI from out-performing content and the means through which out-performing content is maintained.

We believe that content analytics is a low-cost automated tool-set that can be leveraged to both maintain relevant content creation and identify and remedy gaps in topical coverage at the same time. The result is the continued identification of great content opportunities and increased share of voice.

## Impact on Advertising

Research shows that half the money brands spend with online publishers is lost in the programmatic advertising supply chain – and 15% is unattributed. This underlines problems with the media industry’s business model, where a “publisher’s paradox” can see traffic increase, but not revenue. These challenges are exacerbated by the pandemic and suggest that a different approach is required.

We have found that in the pandemic environment, the most effective use of display advertising is through leveraging retargeting or remarketing techniques, but only when used as brand uplift in support of a targeted content syndication lead generation campaign. 60% of our survey respondents agreed.



What type of retargeting is the next question to answer. Particularly now, in light of this new stressful environment.

The truth is that web visitors, even those who have downloaded one of your assets and who don’t convert on your product offering usually experience two things: They aren’t yet ready to buy, or they don’t yet understand how your product can help them.

Simply retargeting everyone who lands on your site not only doesn’t work, it risks losing potentially active buyers who are annoyed at blanket messaging. It is in part why some marketers are increasing traffic but not increasing revenue. The visitor who reads a blog post and then bounces requires a very different message than the visitor who reads a blog post, completes a lead-magnet form and reviews your pricing.

Sending the wrong offer to the wrong person at the wrong stage of their buyer’s journey results in failure. 73% of our survey respondents agreed.

Instead of targeting everyone with a single message, 58% of those surveyed said that targeting users by specific actions taken on their site increased their conversion rates by 25%.

# AUTOMATION

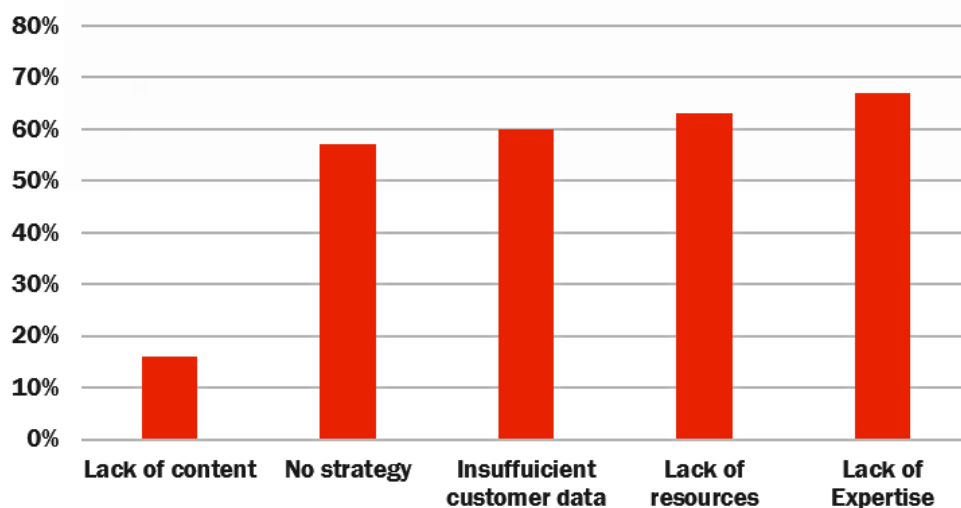
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## Marketing Automation.

Marketing automation integration is being embraced by an overwhelming majority of Cybersecurity marketers this year. 92% of those surveyed are investing more resources and budget into marketing automation integration. The top 3 objectives behind this shift are to improve campaign effectiveness, improve quality lead generation and build stronger alignment between Marketing and Sales.

At the same time, there is a gap between expectations and reality when it comes to the time it takes to realize the benefits. In our survey, almost half (49%) say 6-12 months is a reasonable timeframe for realizing these benefits, whereas the other half (42%) were looking for results in under six months.

### Reasons Not Implemented



Of those who have not yet implemented marketing automation, the leading reasons for this are a lack of expertise (67%), a lack of resources (63%) and a lack of strategy (57%). One contributing factor may be the huge number of marketing automation tools on the market. Many struggle to decide which tool represents the best value for money.

Pre-COVID-19 data also presents a new form of buyer behavior where 90% of B2B buyers now twist and turn through the sales funnel, looping back and repeating at least one or more tasks in the buyer's journey (CMO, 2019) which is extending Cybersecurity buying cycles and adding to the complexity of managing the process.

With the proven value of marketing automation in upselling, process management, lead generation and nurturing, every marketer should proactively develop a strategy and allocate budget to leverage these powerful tools to their advantage.

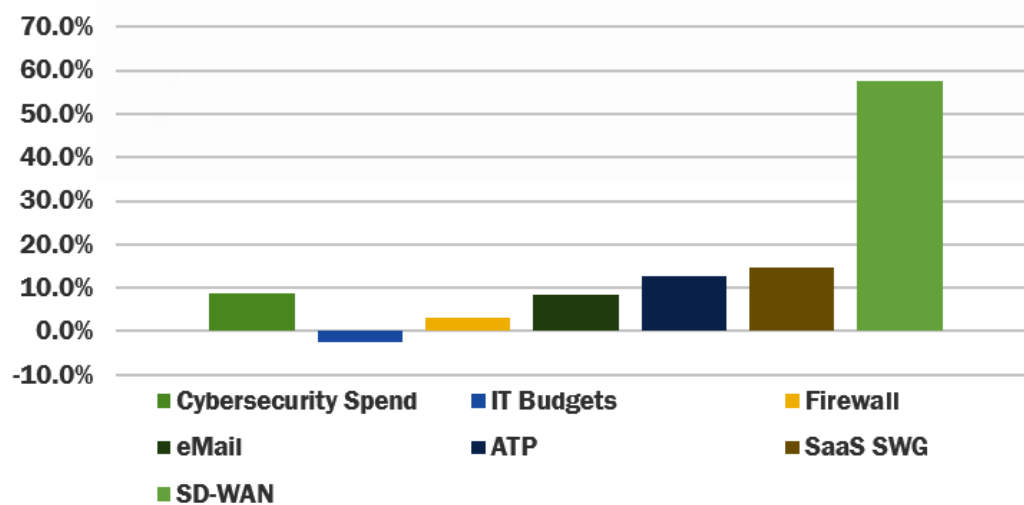
# PANDEMIC INSIGHTS

Cybersecurity is a rapidly growing and changing market, with new vendors, attack methods, technologies, and product convergence continually creating new winners and losers.

COVID-19 has acted as a major catalyst for InfoSec teams to begin to rethink conventional static defense postures and initiate network transformations that better match today's architecture where users and applications reside everywhere.

With WFH lock-downs, the attack surface has now expanded well beyond typical corporate network controls, requiring the adoption of new security architectures and the embrace of Zero Trust strategies, SASE, SF-WAN, Secured Web Gateway and ATP solutions designed to address an uncontrollable remote workforce.

**Market Growth 2020**



As users are now mobile, and applications are shifting to the cloud, the classic corporate network is disappearing.

Emphasis on innovative and scalable solutions around Identity and Endpoint security will continue to grow. The solutions that improve security for accessing critical data within the organization, and are able to add dimensions like location, behavior, habits, and access rights to help determine what is allowed in and what should be cut off will have a decided advantage in the new normal.

The need for new architectures and deeper security controls is driving the important framework known as Zero Trust, where all traffic is inherently questioned and access controls must be verified at multiple stages. But unlike some other buzz-words or bumper-stickers of prior hype-cycles, Zero Trust defines an entirely different way to approach Cybersecurity defenses and is as tangible and real as it could be.



As a reference architecture, Zero Trust will drive product innovation and development requirements and deeply influence all endpoint, network and edge solution offerings in the future.

So, any vendor who wants to be taken seriously in the new normal, must address the architectural implications of Zero Trust. But as is the case with many topics, it's not what you include in your messaging as much as how you frame and direct it that counts.

We are addicted to authenticity and truth in messaging and positioning. Our backgrounds as CISOs inform our consumption habits and we are repelled by audacious claims that can't possibly be true. We're also unmoved by fear, uncertainty and doubt, because we spent our whole careers living with the realities of cyberthreat every day. We don't think it is an effective way to market Cybersecurity solutions.

Nor do the 28 CISOs who sit on our advisory board.

What we believe is that direct messaging that honestly frames a solution against the background of the actual threats it addresses is highly effective. We are advocates of focusing on what it is that a company does really well and working to stake out a dominant claim in that segment. This requires the courage to leave something on the table, but a strident focus on a single target always prevails in the long term.

We find that under the present circumstances, your target audience is even less accessible and that what little time and mind-share is available can only be drawn in through honest communication. In fact, honest communication is so rare that it differentiates by simply existing. If you want to reach today's InfoSec decision makers, the short advice is to tell the truth. Do it quickly. Do it simply. Promise only what you have delivered. And what you can deliver again.

Messaging is key to every marketing motion. From content to events to promotions to advertising. The pandemic has most noticeably impacted live and in-person events of course and has brute-forced a massive shift in the direction of marketing spend. Many marketers we surveyed got stuck for a bit while assessing the probability of a rapid or drawn-out recovery.

It now appears that we will be in this state for quite a while and any prognoses for a recovery is cloudy. This is not great news for most businesses, but is extraordinarily opportune for cybersecurity vendors who target their segments aggressively with intelligent messaging and precision positioning.

# PANDEMIC INSIGHTS

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With almost every in-person event canceled and a low likelihood of face-to-face meetings throughout the balance of 2020, Cybersecurity marketers need to fully embrace digital channels, including virtual events or other tactics like paid media, refreshed content and new messaging to engage InfoSec audiences.

While many Cybersecurity vendors paused their communication plans at the start of the pandemic, clarified visibility into the second half now allows marketing to focus spend on tactics that work.

Messaging must be adjusted so it is relevant and solution-oriented and it needs to be delivered, as we've said, in an authentic voice and be sensitive to the issues impacting the target audience. Prosumers will remember brands both for what they did during the pandemic and for what they didn't do.

WFH CISOs and senior practitioners are less inclined to absorb messaging that is misaligned. Cybersecurity marketers who provide content and advertising that is germane to the moment will gain traction. Since the majority of Cybersecurity vendors remain in hunker-down mode, those vendors who aggressively pursue with clear and focused stories, can leverage strategic openings across all market segments. Careful targeting and appropriate reallocations of spend will enable marketers to capture increased segment share.

The pandemic also offers a unique opportunity to transform intentional marketing. Cybersecurity vendors need to assess their customer data and reevaluate their target account lists to ensure that struggling industries and businesses are suppressed.

Data-driven initiatives will provide the greatest optimization opportunities.

Marketing automation tools that enable marketers to nurture visitors based on their browsing activities, and those that provide ad targeting and behavior tracking, dynamic segmentation, multichannel marketing, advanced filters and tags, progressive profiling and lead-scoring, SEO and analytics should become a top priority for the second half.

Marketers should also engage with automated content analytics to assure that opinion biases are eliminated and that content is tailored to actual market consumption trends based on empirical data to gain competitive advantage and an increased share of voice.

From a consumption point of view, content needs to be comprehensive and data-driven, but it also needs to be unique and quickly assimilated. The most effective content today is educational, pointed and brief while clearly demonstrating how a product or service solves a real-life Cybersecurity threat and is supported by brief and verifiable case studies or independent industry reviews.

# PANDEMIC INSIGHTS

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Video was becoming a critical medium prior to the pandemic with HubSpot reporting that 75% of executives watched work-related videos on business websites at least once a week, and that 59% of executives would rather watch a video than read text.

Now, video has become essential in broadcast media outreach and marketers have a unique opportunity to apportion a share of reallocated marketing funds to video production as audiences are forgiving of lowered production values as they consider the circumstances. The focus however must steadily be targeted to authenticity, and reflect the vendor's personality. The recent B2C video by CrowdStrike is a classic example of the joining of message, tone and personality resulting in a clear emotional connection and a high level of engagement.

During the pandemic, half of all people read the news or their social media updates via their mobile devices. Video content must be scalable and mobile-friendly. Pay attention to the fastest download times, the most user-friendly streaming services and the platform.

The benefits that accrue to the use of YouTube, for example, include the search functionality that will factor website, content and social media in addition to the video itself. This effectively doubles the content's search power and directs Google search attention to the rest of your relevant content assets.

By including video in outbound email campaigns and constructing video landing pages with inspirational customer stories and powerful calls to action, it can become a cost-efficient approach to increasing the open-rate and overall efficacy of a digital marketing campaign.

Finally, marketers can seize the moment by personalizing their outreach and demand generation activities. Content syndication lead generation programs that rely entirely on email and intent data need innovation layers that can validate electronic intent.

Tone and approach are now more critical than ever and the process of enhancing MQLs with intent validation either through AI-enabled or direct human outreach can dramatically increase conversion rates, even while operating within an extended pandemic.

Our key takeaways for marketing effectiveness during this extended lockdown are a focus on brand authenticity, economy of content, messaging tone and efficiency, precision-targeted paid, automation, innovation and optimization through data-driven initiatives.

In short, doing more with less but with precision targeting and improved intelligence.

# ABOUT OUR SPONSOR

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Each of our 33 media properties provides education, research and news that is specifically tailored to key vertical sectors including banking, healthcare and the public sector; geographies from North America to Southeast Asia; and topics such as data breach prevention, cyber risk assessment and fraud.

Our annual global summit series connects senior security professionals with industry thought leaders to find actionable solutions for pressing cybersecurity challenges.

More information at [www.ismg.io](http://www.ismg.io)





# CYBER THEORY

CyberTheory is a full-service cybersecurity marketing advisory firm, providing advertising, marketing, content, digital strategy, messaging, positioning, event management and media publishing. We manage broad demand generation programs with extremely high conversion rates. In addition to our resident CISO team and Customer Advisory Board, our extensive knowledge model allows us personalized targeting of each and every Cybersecurity buyer persona. With strategic insights from global education services, media providers, intelligence analysts, journalists and executive leaders, we're always aligned with the latest industry trends.

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