

Covid-19 Impact On Cybersecurity Market by Technology (Network Security, Application Security, Endpoint Security, Cloud Security, Database Security, Web Security, ICS Security), Vertical, Region - Global Forecast to 2021

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Abstracts

Increase in realization for endpoint and VPN security measures drives the cybersecurity market during the COVID-19 crisis

The impact of COVID-19 on the global cybersecurity market size is expected to grow from USD 183.2 billion in 2019 to USD 230.0 billion by 2021, at a Compound Annual Growth Rate (CAGR) of 12.0% during the forecast period. COVID-19 crisis has transformed the thought process of a company's management and board toward cybersecurity. Especially, SMBs, startups, and large enterprises, except technology giants, were considering cybersecurity budgets as unavoidable Capital Expenditure (CAPEX) due to regulatory and compliance measures. Several digital agencies are yet to have a cybersecurity policy in place. This crisis has exposed companies to scenarios where their IPs are at the mercy and conduct of their employees, working remotely either on office laptops with zero firewall protection or personal laptops with/without free antivirus packages.

Endpoint security segment to show the highest growth rate during the forecast period in the cybersecurity market

Endpoint security solutions are a combination of both Endpoint Protection Platform (EPP) and Endpoint Detection and Response (EDR) solutions. Together these solutions secure endpoints and remote devices used in organizations from viruses, Trojans, and malware, as well as advanced threats, such as zero-day malware and advanced

persistent threats. EDR solutions enable continuous detection of and response to advanced cybersecurity threats and considerably improve threat detection, security monitoring, and incident response proficiencies for enterprises across verticals.

Healthcare segment to record higher investment and growth in 2020

COVID-19 poses an occupational health risk to healthcare workers, where COVID-19 has infected thousands of healthcare workers worldwide. Hence, preventing intra-hospital transmission of this communicable disease is a key priority for healthcare institutions and administrative bodies. As the remote and teleworking modes are adopted in the healthcare industry, the possibility of using personal devices and the home internet connections that do not have the enterprise-grade security would result in remote users vulnerable to malicious cyberattacks. In February 2020, WHO warned of fraudulent emails that have been sent by criminals posing as WHO. Cybercriminals have also been impersonating the US CDC by creating domain names similar to the CDC's web address to request passwords and even Bitcoin donations to fund a fake vaccine.

North America to record the largest market share in the global cybersecurity market impacted by COVID-19 crisis

North America is expected to hold the largest share in the global cybersecurity industry, while Asia Pacific (APAC) is expected to grow at the highest CAGR during the forecast period. The high growth rate in APAC can be attributed to organizations in the region, grabbing opportunities to go beyond ensuring their regulations and compliances, and applying technology to curtail threats on enterprise devices. Additionally, the region has the highest adoption of mobile devices and connected devices that are highly vulnerable to endpoint attacks.

North America is the most significant revenue contributor to the cybersecurity market. The region is witnessing significant developments, especially in the endpoint security segment. In North America, the high penetration of this technology can be attributed to the increasing use of the automation and behavioral analysis for threat detection, growing amount of data across verticals, and rising investments by companies in real-time security solutions.

In-depth interviews were conducted with Chief Executive Officers (CEOs), marketing directors, innovation and technology directors, and executives from various key organizations operating in the cybersecurity market.

By Company Type: Tier 1 – 55%, Tier 2 – 20%, and Tier 3 – 25%

By Designation: C-level – 60%, Directors – 25%, and Others – 15%

By Region: North America – 35%, Europe – 25%, APAC – 20%, MEA – 10%, Latin America – 10%

Key market players profiled in this report include Acunetix (Malta), ABB (Switzerland), Airbus (France), Belden (US), Baker Hughes (US), Microsoft (US), CrowdStrike (US), Symantec (US), TrendMicro (Japan), Sophos (UK), McAfee (US), Kaspersky (Russia), K7 Computing (India), ESET (Slovakia), Cisco (US), FireEye (US), F-Secure (Finland), Palo Alto Networks (US), Check Point Software (Israel), Fortinet (US), CyberArk (US), Cyberbit (Israel), Checkmarx (Israel), Rockwell Automation (US), CloudFlare (US), Vercaode (US), Pradeo (France), Rapid7 (US), Synopsys (US), Trustwave (US), WhiteHat Security (US), ImmuniWeb (High-Tech Bridge SA) (Switzerland), Contrast Security (US), Qualys (US), SiteLock (US), Sophos (UK), IBM (US), Imperva (US), CipherCloud Inc. (US), Avanan Inc. (US), Oracle (US), Thales (France), Micro Focus (UK), Fortinet (US), Imperva (US), Citrix (US), Juniper Networks (US), Akamai (US), Avaya (US), DXC Technology (US), Nokia (Finland), and Zscaler (US). These players have adopted various growth strategies, such as partnerships and new service launches, to expand their presence further in the impact of COVID-19 on the cybersecurity market and broaden their customer base.

Research coverage

The market study covers the impact of COVID-19 on the cybersecurity market across different segments. It aims at estimating the market size and the growth potential of this market across by technology segments (network security, application security, endpoint security, cloud security, database security, web security, and ICS security) and vertical (banking, financial services and insurance, healthcare, manufacturing, IT/ITeS, telecom, utilities, and public sector), and region. The study also includes an in-depth analysis of the key market players, key observations related to product and business offerings, recent developments, and key market strategies.

Key benefits of buying the report

The report is expected to help the market leaders/new entrants in this market by providing them information on the closest approximations of the revenue numbers for

the overall impact of COVID-19 on the cybersecurity market and its segments. This report is also expected to help stakeholders understand the competitive landscape and gain insights to improve the position of their businesses and to plan suitable go-to-market strategies. The report also aims at helping stakeholders understand the pulse of the market and provide them with information on key market drivers, restraints, challenges, and opportunities.

Contents

1 INTRODUCTION

- 1.1 COVID-19 HEALTH ASSESSMENT
- 1.2 COVID-19 ECONOMIC ASSESSMENT
 - 1.2.1 COVID-19 IMPACT ON THE ECONOMY—SCENARIO ASSESSMENT

2 RESEARCH METHODOLOGY

- 2.1 RESEARCH SCOPE
 - 2.1.1 OBJECTIVES OF THE STUDY
 - 2.1.2 MARKET DEFINITION
 - 2.1.3 INCLUSION/EXCLUSION
- 2.2 ASSUMPTIONS
- 2.3 DATA TRIANGULATION
 - 2.3.1 PRIMARY BREAKDOWN
- 2.4 STAKEHOLDERS

3 EXECUTIVE SUMMARY

4 IMPACT ON THE ECOSYSTEM AND EXTENDED ECOSYSTEM

- 4.1 CYBERSECURITY ECOSYSTEM ANALYSIS, BY STAKEHOLDER
 - 4.1.1 TECHNOLOGY PROVIDER
 - 4.1.2 SOLUTION DESIGNER AND DEVELOPER/CONSULTANT
 - 4.1.3 SYSTEM INTEGRATOR
 - 4.1.4 RESELLER
 - 4.1.5 MANAGED SERVICE PROVIDER
- 4.2 COVID-19 PANDEMIC-DRIVEN MARKET DYNAMICS AND FACTOR ANALYSIS
 - 4.2.1 DRIVERS AND OPPORTUNITIES
 - 4.2.2 RESTRAINTS AND CHALLENGES
 - 4.2.3 CUMULATIVE GROWTH ANALYSIS

5 BUSINESS IMPLICATIONS OF COVID-19 ON THE CYBERSECURITY MARKET

- 5.1 IMPLICATION ON TECHNOLOGY SEGMENTS (PESSIMISTIC, PRE-COVID-19, AND OPTIMISTIC SCENARIOS)
 - 5.1.1 NETWORK SECURITY FORECAST (2019–2021)

- 5.1.1.1 Forecast 2019–2021 (optimistic/pre-COVID-19/pessimistic)
- 5.1.2 APPLICATION SECURITY FORECAST (2019–2021)
 - 5.1.2.1 Forecast 2019–2021 (optimistic/pre-COVID-19/pessimistic)
- 5.1.3 ENDPOINT SECURITY FORECAST (2019–2021)
 - 5.1.3.1 Forecast 2019–2021 (optimistic/pre-COVID-19/pessimistic)
- 5.1.4 CLOUD SECURITY FORECAST (2019–2021)
 - 5.1.4.1 Forecast 2019–2021 (optimistic/pre-COVID-19/pessimistic)
- 5.1.5 DATABASE SECURITY FORECAST (2019–2021)
 - 5.1.5.1 Forecast 2019–2021 (optimistic/pre-COVID-19/pessimistic)
- 5.1.6 WEB SECURITY FORECAST (2019–2021)
 - 5.1.6.1 Forecast 2019–2021 (optimistic/pre-COVID-19/pessimistic)
- 5.1.7 INDUSTRIAL CONTROL SYSTEMS SECURITY FORECAST (2019–2021)
 - 5.1.7.1 Forecast 2019–2021 (optimistic/pre-COVID-19/pessimistic)

6 COVID-19 IMPACT ON MAJOR VERTICALS WITH USE CASES AND HOW CLIENTS ARE RESPONDING TO CURRENT SITUATION

6.1 BANKING, FINANCIAL SERVICES AND INSURANCE

- 6.1.1 FORECAST 2019–2021 (OPTIMISTIC/PRE-COVID-19/PESSIMISTIC)
- 6.1.2 KEY USE CASES
- 6.1.3 MNM VIEWPOINT (VERTICAL'S RESPONSE TO COVID-19)

6.2 HEALTHCARE

- 6.2.1 FORECAST 2019–2021 (OPTIMISTIC/PRE-COVID-19/PESSIMISTIC)
- 6.2.2 KEY USE CASES
- 6.2.3 MNM VIEWPOINT (VERTICAL'S RESPONSE TO COVID-19)

6.3 MANUFACTURING

- 6.3.1 FORECAST 2019–2021 (OPTIMISTIC/PRE-COVID-19/PESSIMISTIC)
- 6.3.2 KEY USE CASES
- 6.3.3 MNM VIEWPOINT (VERTICAL'S RESPONSE TO COVID-19)

6.4 INFORMATION TECHNOLOGY/INFORMATION TECHNOLOGY-ENABLED SERVICES

- 6.4.1 FORECAST 2019–2021 (OPTIMISTIC/PRE-COVID-19/PESSIMISTIC)
- 6.4.2 KEY USE CASES
- 6.4.3 MNM VIEWPOINT (VERTICAL'S RESPONSE TO COVID-19)

6.5 TELECOM

- 6.5.1 FORECAST 2019–2021 (OPTIMISTIC/PRE-COVID-19/PESSIMISTIC)
- 6.5.2 KEY USE CASES
- 6.5.3 MNM VIEWPOINT (VERTICAL'S RESPONSE TO COVID-19)

6.6 UTILITIES

- 6.6.1 FORECAST 2019–2021 (OPTIMISTIC/PRE-COVID-19/PESSIMISTIC)
- 6.6.2 KEY USE CASES
- 6.6.3 MNM VIEWPOINT (VERTICAL'S RESPONSE TO COVID-19)
- 6.7 PUBLIC SECTOR
 - 6.7.1 FORECAST 2019–2021 (OPTIMISTIC/PRE-COVID-19/PESSIMISTIC)
 - 6.7.2 KEY USE CASES
 - 6.7.3 MNM VIEWPOINT (VERTICAL'S RESPONSE TO COVID-19)
- 6.8 OTHERS
 - 6.8.1 FORECAST 2019–2021 (OPTIMISTIC/PRE-COVID-19/PESSIMISTIC)
 - 6.8.2 MNM VIEWPOINT (VERTICAL'S RESPONSE TO COVID-19)

7 COVID-19 IMPACT ON REGIONS

- 7.1 INTRODUCTION
- 7.2 NORTH AMERICA
 - 7.2.1 FORECAST 2019–2021 (OPTIMISTIC/PRE-COVID-19/PESSIMISTIC)
- 7.3 EUROPE
 - 7.3.1 FORECAST 2019–2021 (OPTIMISTIC/PRE-COVID-19/PESSIMISTIC)
- 7.4 ASIA PACIFIC
 - 7.4.1 FORECAST 2019–2021 (OPTIMISTIC/PRE-COVID-19/PESSIMISTIC)
- 7.5 MIDDLE EAST AND AFRICA
 - 7.5.1 FORECAST 2019–2021 (OPTIMISTIC/PRE-COVID-19/PESSIMISTIC)
- 7.6 LATIN AMERICA
 - 7.6.1 FORECAST 2019–2021 (OPTIMISTIC/PRE-COVID-19/PESSIMISTIC)

8 COVID-19 FOCUSED PROFILES OF KEY VENDORS

- 8.1 INTRODUCTION
- 8.2 COMPANY PROFILES
 - 8.2.1 NETWORK SECURITY
 - 8.2.2 APPLICATION SECURITY
 - 8.2.3 ENDPOINT SECURITY
 - 8.2.4 CLOUD SECURITY
 - 8.2.5 DATABASE SECURITY
 - 8.2.6 WEB SECURITY
 - 8.2.7 ICS SECURITY

9 APPENDIX

9.1 KNOWLEDGE STORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL
9.2 AUTHOR DETAILS

List Of Tables

LIST OF TABLES

TABLE 1 COVID-19-RELATED BANKING, FINANCIAL SERVICES AND INSURANCE USE CASES

TABLE 2 COVID-19-RELATED HEALTHCARE USE CASES

TABLE 3 COVID-19-RELATED MANUFACTURING USE CASES

TABLE 4 COVID-19-RELATED INFORMATION TECHNOLOGY/INFORMATION TECHNOLOGY-ENABLED SERVICES USE CASES

TABLE 5 COVID-19-RELATED TELECOM USE CASES

TABLE 6 COVID-19-RELATED UTILITIES USE CASES

TABLE 7 COVID-19-RELATED PUBLIC SECTOR USE CASES

TABLE 8 COVID-19 ORIENTED PROFILES OF KEY NETWORK SECURITY VENDORS

TABLE 9 COVID-19 ORIENTED PROFILES OF KEY APPLICATION SECURITY VENDORS

TABLE 10 COVID-19 ORIENTED PROFILES OF KEY ENDPOINT SECURITY VENDORS

TABLE 11 COVID-19 ORIENTED PROFILES OF KEY CLOUD SECURITY VENDORS

TABLE 12 COVID-19 ORIENTED PROFILES OF KEY DATABASE SECURITY VENDORS

TABLE 13 COVID-19 ORIENTED PROFILES OF KEY WEB SECURITY VENDORS

TABLE 14 COVID-19 ORIENTED PROFILES OF KEY ICS SECURITY VENDORS

List Of Figures

LIST OF FIGURES

- FIGURE 1 COVID-19 THE GLOBAL PROPAGATION
- FIGURE 2 COVID-19 PROPAGATION: SELECT COUNTRIES
- FIGURE 3 COUNTRIES BEGIN WITH SIMILAR TRAJECTORIES BUT CURVES DEVIATE BASED ON MEASURES TAKEN
- FIGURE 4 REVISED GDP FORECASTS FOR SELECT G20 COUNTRIES IN 2020
- FIGURE 5 CRITERIA IMPACTING THE GLOBAL ECONOMY
- FIGURE 6 SCENARIOS IN TERMS OF RECOVERY OF THE GLOBAL ECONOMY
- FIGURE 7 BREAKUP OF PRIMARY RESPONDENT PROFILES
- FIGURE 8 GLOBAL CYBERSECURITY MARKET GROWTH RATE 2019–2021 (USD BILLION)
- FIGURE 9 NETWORK SECURITY MARKET GROWTH RATE 2019–2021 (USD BILLION)
- FIGURE 10 APPLICATION SECURITY MARKET GROWTH RATE 2019–2021 (USD BILLION)
- FIGURE 11 ENDPOINT SECURITY MARKET GROWTH RATE 2019–2021 (USD BILLION)
- FIGURE 12 CLOUD SECURITY MARKET GROWTH RATE 2019–2021 (USD BILLION)
- FIGURE 13 DATABASE SECURITY MARKET GROWTH RATE 2019–2021 (USD BILLION)
- FIGURE 14 WEB SECURITY MARKET GROWTH RATE 2019–2021 (USD BILLION)
- FIGURE 15 INDUSTRIAL CONTROL SYSTEMS SECURITY MARKET GROWTH RATE

2019–2021 (USD BILLION)

- FIGURE 16 BANKING, FINANCIAL SERVICES AND INSURANCE: CYBERSECURITY MARKET GROWTH RATE, 2019–2021 (USD BILLION)
- FIGURE 17 HEALTHCARE: CYBERSECURITY MARKET GROWTH RATE, 2019–2021 (USD BILLION)
- FIGURE 18 SYSTEMS ENGINEERING INITIATIVE FOR PATIENT SAFETY
- FIGURE 19 MANUFACTURING: CYBERSECURITY MARKET GROWTH RATE, 2019–2021 (USD BILLION)
- FIGURE 20 INFORMATION TECHNOLOGY/INFORMATION TECHNOLOGY-ENABLED SERVICES: CYBERSECURITY MARKET GROWTH RATE, 2019–2021 (USD BILLION)

FIGURE 21 TELECOM: CYBERSECURITY MARKET GROWTH RATE, 2019–2021
(USD BILLION)

FIGURE 22 CHINA TELECOM REVENUE – YOY GROWTH (FEB 2019 – FEB 2020)

FIGURE 23 UTILITIES: CYBERSECURITY MARKET GROWTH RATE, 2019–2021
(USD BILLION)

FIGURE 24 PUBLIC SECTOR: CYBERSECURITY MARKET GROWTH RATE,
2019–2021 (USD BILLION)

FIGURE 25 OTHERS: CYBERSECURITY MARKET GROWTH RATE, 2019–2021
(USD BILLION)

FIGURE 26 NORTH AMERICA: CYBERSECURITY MARKET GROWTH RATE,
2019–2021 (USD BILLION)

FIGURE 27 EUROPE: CYBERSECURITY MARKET GROWTH RATE, 2019–2021
(USD BILLION)

FIGURE 28 ASIA PACIFIC: CYBERSECURITY MARKET GROWTH RATE, 2019–2021
(USD BILLION)

FIGURE 29 MIDDLE EAST AND AFRICA: CYBERSECURITY MARKET GROWTH
RATE, 2019–2021 (USD BILLION)

FIGURE 30 LATIN AMERICA: CYBERSECURITY MARKET GROWTH RATE,
2019–2021 (USD BILLION)

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