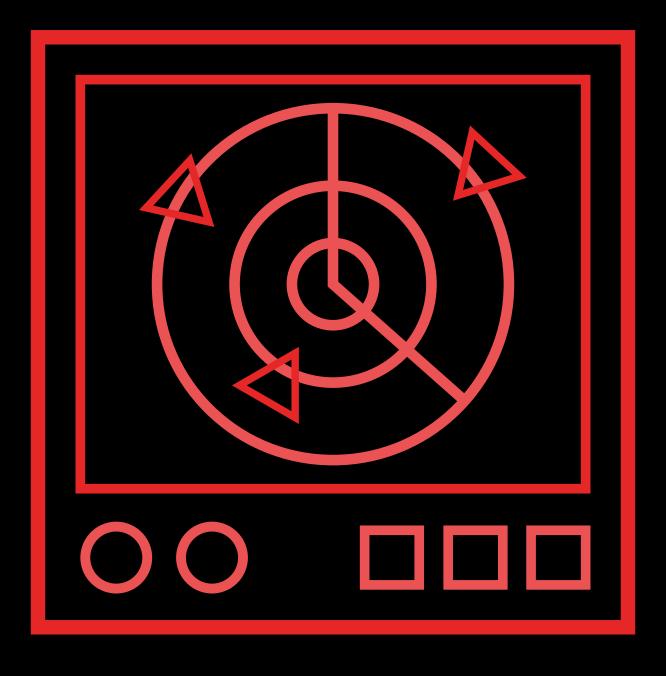
InboxInsight ⊗

A DATA-DRIVEN ACTIVATION GUIDE AND CATEGORY REPORT.



MDR & XDR

ACCELERATING B2B SALES FOR MDR & XDR PROVIDERS

Intent data helps marketers understand topics of research, specific challenges, and pain points experienced by prospects. Viewed in isolation and without an activation strategy, even the best intent layers deliver lackluster results. Marketers struggle to find effective ways to **educate decision makers, convert prospects into customers** and **accelerate sales times**. If this sounds familiar, then read on, this is the guide for you!

Introducing the **Threat Detection and Response (MDR/XDR**) data activation guide. We've combined; key market trends, analysis from top performing content, with live intent data to identify the in-market accounts and help guide you to effectively target the exact prospects for your solution.

Incorporate this approach into your go-to-market strategy, and you'll be better placed to tailor the right message, to the right audience, at the right buying journey stage.

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WHAT VALUE WILL THIS GUIDE DELIVER MDR & XDR PROVIDERS?

The MDR and XDR markets are rapidly growing as a response to increasingly sophisticated cyber-attacks and shifting market demands. While regulatory compliance remains a top priority, 2024's market shaping factors include: a growing demand for blended solutions, enhanced threat intelligence, changing deployment modes, and increased adoption from fringe verticals and SMEs.

Leverage the following insights to ensure your business is working to solve the pain points identified, adapt to a changing market and capture the demand.

MXDR solutions are viewed as a natural union of platform and service, together they're seen as a comprehensive defense strategy against the evolving threat landscape, combining agility, intelligence, and collaboration for robust cybersecurity. Trends in this integrated market include, combining advanced analytics and AI to deliver contextualized threat intelligence, a need to leverage automation that enables rapid response times and reduces the burden on human resources, and solutions that adapt to cloud infrastructures.

As a result of these market trends MDR, XDR and MXDR are high on the list of investment priorities for businesses. 2024 presents a significant revenue opportunity for solution providers that are able to identify who to target, when, and how.

Intelligence without application is useless. True sales acceleration is achieved when meaningful insights are applied through a data-driven go-to-market strategy. Use this data activation guide to solve pain points, adapt to a changing market and capture the demand.

3



KEY PAIN POINTS FOR IT PROFESSIONALS

Cost of procuring, maintaining and updating necessary cybersecurity tools is significant with many organizations operating on a limited budget. (*Integrity360*)

Increasing volume and sophistication of cyberattacks, combined with shortages of skilled security personnel plague organizations of all sizes. (<u>Gartner</u>)

High analyst burn out. Organizations with Security Operations Centers (SOC) may receive thousands of alerts a day whilst an analyst can only validate 100 per day, (VMware) leading to alert fatigue, requiring more manpower and expertise to determine significant breaches. (CrowdStrike)

Organizations struggling to staff security teams face great challenges with adoption. Leading-edge tools can be detrimental if organizations lack the time and resources to fully deploy and optimize solutions. (CrowdStrike)

Cybercriminals are becoming more sophisticated, leveraging new tactics, techniques and procedures to compromise systems and networks, leading to organizations constantly updating their cybersecurity defenses. (Integrity360)

Loss of customers and financial penalties for failing to secure privacy of customer and employee data amid strict privacy regulations can lead to reputational damage of an organization. (InfoQ)

Increasing volume and sophistication of cyberattacks, combined with shortages of skilled security personnel plague organizations of all sizes (Gartner)

Convincing key stakeholders than an XDR solution is necessary is difficult with medium-sized businesses already using 50-60 security products and enterprises using up to 130. (<u>VMware</u>)

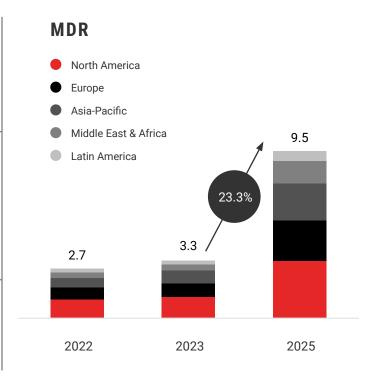
XDR Solutions may be limited to only a portion of an organizations attack surface. This leads to significant limitations in the way they can function creating challenges for IT teams. (Fortinet)

82%

of all security breaches involve human error. Improperly informed and prepared employees are a major threat to organizations. (Verizon)

MARKET TRENDS & INVESTMENT AREAS FOR MDR & XDR PROVIDERS

- By 2025, 50% of organizations will be using MDR services for threat monitoring, detection and response functions that offer threat containment and mitigation capabilities. (<u>Gartner</u>)
- XDR was valued at \$1.4 Billion in 2022 and is estimated to register a CAGR of 19% between 2023 - 2032 valuing the sector at \$8 Billion by 2032. Banking, Financial Services and Insurance have >25% market share of XDR solutions. (Global Market Insights)
- The MDR market is expected to be worth \$9.5 Billion by 2028 growing at a CAGR of 23.3%. (MarketsandMarkets)



EXTENDED DETECTION & RESPONSE MARKET

GLOBAL STATISTICS

\$1.4 BN

Value in 2022

CAGR (2023-2032)

>19%

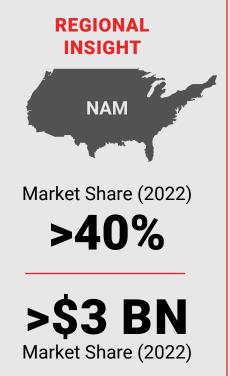
\$8 BN

Value in 2032

SEGMENT STATISTICS

>25%

BFSI segment Market Share (2022)

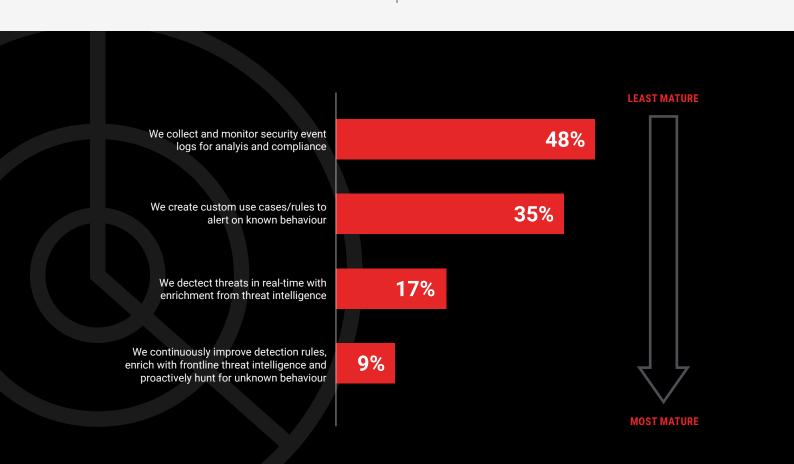


- 40% of organizations will have deployed an XDR platform by 2027, up from 5% in 2021. (Gartner)
- MDR services will mature and expand to offer more types of managed services, such as Cloud Security, API Security, Edge Security, and Digital Risk Protection Services. (<u>Bitdefender</u>)
- Managed Extended Detection and Response (MXDR) is a growing trend in 2023/24 with firms merging EDR, MDR & XDR into one solution to address threats faster and allow customer to respond quickly. Allowing solutions to be at the curve of cybersecurity threats. (<u>Forbes</u>)
- Introducing AI/ML-Powered MDR Services that ease adoption and scalability will provide lucrative opportunities for businesses providing MDR solutions. (MarketsandMarkets)

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- Insurers are expected to move aggressively into Cybersecurity by acquiring MDR providers in 2023. These acquisitions will help refine underwriting guidelines, changing the cyber insurance market dynamics and the requirements for coverage and pricing. (<u>Forrester</u>)
- MDR Vendors can improve their revenue opportunities by:
 - Developing customizable MDR solutions at affordable prices to attract small and midsized businesses
 - Explore mergers and acquisitions of competitors to enhance regional presence.
- Offer consulting and value-added services to help clients take advantage of digital transformation initiatives.

 (Frost & Sullivan)
- Most organizations detect cyberattacks using the 'least mature' actions, highlighting big opportunities for improvement. (Kroll)

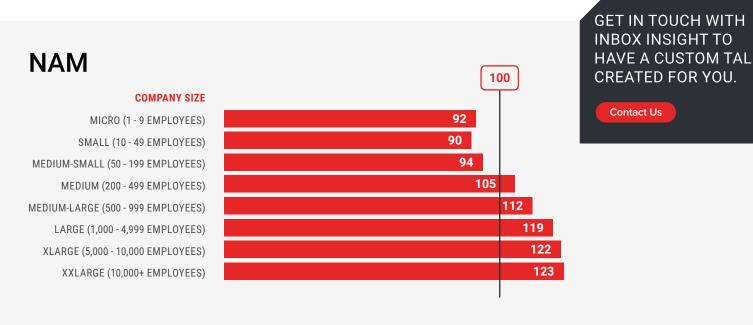


IDENTIFYING, TARGETING, AND CAPTURING DEMAND FOR MDR & XDR SOLUTIONS

Right now your target audience are leaving digital footprints everywhere as they move around the web reflecting their interests, challenges, and their intent to purchase a particular product.

Using intent data we can identify criteria such as company size and industries. Then, drilling deeper into intent topics and specific account data, a Target Account List (TAL) can be built at a country level. Knowing where the demand for MDR & XDR solutions is at its highest enables a data driven targeting approach to be implemented, ensuring maximum efficiency of your marketing spend by focusing efforts where demand is ready to be captured. Combining insights from a range of third-party data sources with our own first party data we can provide your Sales and Marketing teams with a clear view of your audience's buying motives, topic searches, intent velocity, and other buyer intelligence.

This rich and robust source of data and insight can transform how your Sales and Marketing teams approach the market and better prioritize where to direct time and resources.



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TOP INDUSTRY INTEREST: NAM

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	Company Name	Business Domain	Company Size	Industry	Topics Spiking in Interest	Average Company Surge Score
1	American Express Company	americanexpress.com	XXLarge (10,000+ Employees)	Finance	26	67
2	GoDaddy Inc.	godaddy.com	Large (1,000 - 4,999 Employees)	Media & Internet	26	69
3	CCS Presentation Systems Inc.	flexential.com	Large (1,000 - 4,999 Employees)	Software	26	68
4	Easter Seals Alabama, Inc.	easterseals.com	Large (1,000 - 4,999 Employees)	Cultural	26	71
5	Lear Corporation	lear.com	XXLarge (10,000+ Employees)	Manufacturing	26	68
6	Schurz Communications Inc.	schurz.com	Large (1,000 - 4,999 Employees)	Media & Internet	26	68
7	MGM Resorts International	mgmresorts.com	XXLarge (10,000+ Employees)	Hospitality & Hotels	25	70
8	Fastenal Company	fastenal.com	XXLarge (10,000+ Employees)	Wholesalers	25	70
9	State of Oregon	oregon.gov	XXLarge (10,000+ Employees)	Government	25	66
10	Sharp Electronics Corporation	sharpusa.com	Large (1,000 - 4,999 Employees)	Manufacturing	25	69
11	Baker Electric, Inc.	baker-electric.com	Medium-Large (500 - 999 Employees)	Construction	25	69
12	TriNet Group, Inc.	trinet.com	Large (1,000 - 4,999 Employees)	Business Services	25	68
13	Siemens Healthcare AB	siemens-healthineers.com	XXLarge (10,000+ Employees)	Wholesalers	25	69
14	Bloomberg	bloomberg.com	XXLarge (10,000+ Employees)	Finance	25	68
15	Whole Foods Market, Inc.	wholefoodsmarket.com	XXLarge (10,000+ Employees)	Retail	25	70
16	SunGard Data Systems	sungard.com	XXLarge (10,000+ Employees)	Software	25	69
17	Utah Interactive, LLC	utah.gov	Small (10 - 49 Employees)	Government	25	69
18	G4S PLC	g4s.com	XXLarge (10,000+ Employees)	Business Services	25	69
19	Department of State	state.gov	XXLarge (10,000+ Employees)	Government	25	67
20	Louisiana State University Health	Isuhsc.edu	Large (1,000 - 4,999 Employees)	Education	25	70
21	Ricoh Americas Corporation	ricoh-usa.com	XXLarge (10,000+ Employees)	Manufacturing	25	67
22	State of Texas	texas.gov	XXLarge (10,000+ Employees)	Government	25	67
23	Insight Enterprises, Inc.	insight.com	XLarge (5,000 - 10,000 Employees)	Wholesalers	25	69
24	R&D DYNAMICS CORPORATION	rddynamics.com	Medium-Small (50 - 199 Employees)	Manufacturing	25	71
25	Sonoco Products Company	sonoco.com	XXLarge (10,000+ Employees)	Manufacturing	25	68
26	Garmin Ltd	garmin.com	XXLarge (10,000+ Employees)	Manufacturing	25	67
27	Weichert Co.	weichert.com	Large (1,000 - 4,999 Employees)	Real Estate	25	67
28	Bureau of Prisons	bop.gov	XXLarge (10,000+ Employees)	Government	25	69
29	Fidelity Investments	fidelity.com	XXLarge (10,000+ Employees)	Finance	25	69
30	Wings Financial Federal Credit Union	wingsfinancial.com	Medium (200 - 499 Employees)	Finance	25	68





TOP INDUSTRY INTEREST: EMEA

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	Company Name	Business Domain	Company Size	Industry	Topics Spiking in Interest	Average Company Surge Score
1	Credit Suisse Group AG	credit-suisse.com	XXLarge (10,000+ Employees)	Finance	26	70
2	L3Harris Technologies	harris.com	XXLarge (10,000+ Employees)	Manufacturing	26	69
3	Honeywell International Inc.	honeywell.com	XXLarge (10,000+ Employees)	Manufacturing	26	71
4	Thales SA	thalesgroup.com	XXLarge (10,000+ Employees)	Transportation & Travel	26	67
5	IWG Plc	regus.com	XLarge (5,000 - 10,000 Employees)	Business Services	26	70
6	AREP	arep.fr	Large (1,000 - 4,999 Employees)	Construction	26	69
7	Siemens Aktiengesellschaft	siemens.com	XXLarge (10,000+ Employees)	Manufacturing	26	69
8	Capgemini SE	capgemini.com	XXLarge (10,000+ Employees)	Software	26	68
9	UBS Group AG	ubs.com	XXLarge (10,000+ Employees)	Finance	26	69
10	Critical Path Inc.	criticalpathinc.net	Micro (1 - 9 Employees)	Business Services	26	70
11	Styrelsen for It og Læring	stil.dk	Medium-Large (500 - 999 Employees)	Software	25	71
12	PricewaterhouseCoopers	pwc.com	XXLarge (10,000+ Employees)	Business Services	25	69
13	SAP SE	sap.com	XXLarge (10,000+ Employees)	Software	25	69
14	Deloitte LLP	deloitte.com	XXLarge (10,000+ Employees)	Business Services	25	70
15	Northern Powergrid (Northeast) Ltd	northernpowergrid.com	Large (1,000 - 4,999 Employees)	Business Services	25	69
16	Saudi Aramco	saudiaramco.com	XXLarge (10,000+ Employees)	Resource Extraction	25	69
17	Celestica Inc	celestica.com	XXLarge (10,000+ Employees)	Manufacturing	25	67
18	Carleton College	carleton.edu	Large (1,000 - 4,999 Employees)	Education	25	70
19	Energie Baden-Wurttemberg	enbw.com	XXLarge (10,000+ Employees)	Energy, Utilities & Waste	25	70
20	Accenture plc	accenture.com	XXLarge (10,000+ Employees)	Software	25	70
21	Ernst & Young	ey.com	XXLarge (10,000+ Employees)	Business Services	25	70
22	Alabanza LLC	alabanza.com	Small (10 - 49 Employees)	Software	25	70
23	Style Holidays Limited	thomascook.com	XXLarge (10,000+ Employees)	Transportation & Travel	25	69
24	CIGNA Corporation	cigna.com	XXLarge (10,000+ Employees)	Insurance	25	70
25	ADS Group Ltd	adsgroup.org.uk	Medium-Small (50 - 199 Employees)	Non-Profit	25	67
26	Fastspeed A/S	fastspeed.dk	Small (10 - 49 Employees)	Media & Internet	25	71
27	Eurofiber B.V.	eurofiber.com	Medium (200 - 499 Employees)	Telecommunications	24	68
28	Deloitte S.L.	deloitte.es	Large (1,000 - 4,999 Employees)	Business Services	24	69
29	Merck & Co., Inc.	merck.com	XXLarge (10,000+ Employees)	Healthcare	24	70
30	European Union	europa.eu	Medium-Small (50 - 199 Employees)	Manufacturing	24	69



CREATING CONTENT THAT RESONATES

By studying the surging intent topics with the largest relevant audiences in MDR & XDR, it can help you prioritize your content focus. And by analyzing changes in interest over time you'll also be able to anticipate emerging 'pains' and provide content that addresses these issues.

This way, you'll be in the best possible position to place relevant content and formats in front of inmarket buyers at each stage of the buyer journey from the offset – significantly increasing your competitive advantage.





EXTENDED DETECTION AND RESPONSE (XDR) IS SEEING THE LARGEST % CHANGE INCREASE OF SURGING ACCOUNTS WITH

317%

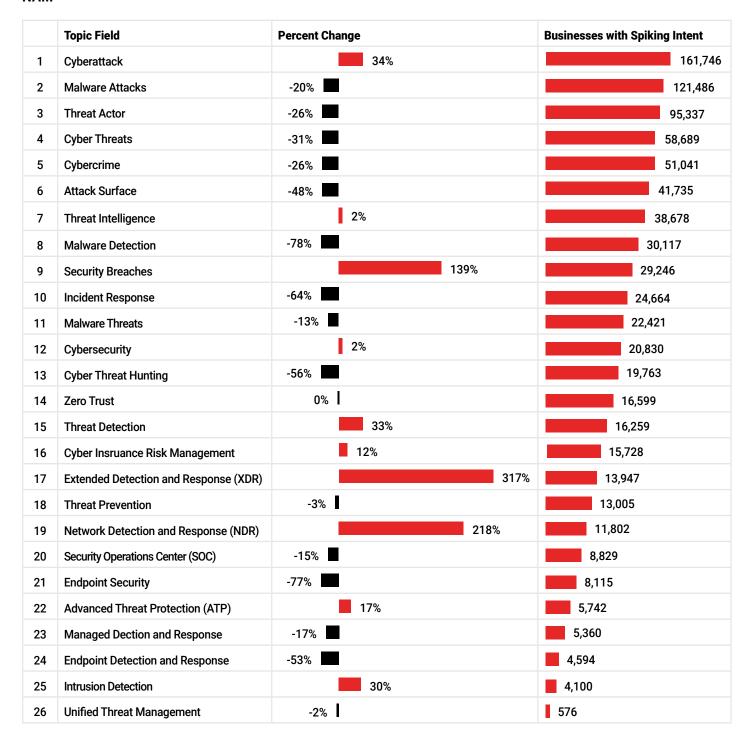
UPLIFT IN THE PAST 90
DAYS IN NAM AND
NETWORK DETECTION
AND RESPONSE (NDR)
HAS THE LARGEST
UPLIFT IN EMEA WITH

+524%



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	Topic Field	Percent Change	Businesses with Spiking Intent	
1	Cyberattack	22%	17,583	
2	Malware Attacks	-2%	13,768	
3	Threat Actor	-34%	12,388	
4	Cyber Threats	29%	12,102	
5	Attack Surface	-44 %	7,318	
6	Cybercrime	-24%	6,526	
7	Malware Detection	-13%	4,844	
8	Threat Intelligence	5%	4,823	
9	Threat Detection	134%	4,301	
10	Security Breacher	55%	3,605	
11	Cybersecurity	9%	3,131	
12	Incident Response	-29%	2,990	
13	Network Detection and Response (NDR)	524%	2,735	
14	Cyber Insurance Risk Management	-11%	2,436	
15	Zero Trust	34%	2,061	
16	Endpoint Security	-80%	1,878	
17	Cyber Threat Hunting	-40%	1,782	
18	Extended Detection and response (XDR)	116%	1,701	
19	Malware Threats	-5%	1,582	
20	Managed Dection and Response (MDR)	25%	1,424	
21	Security Operations Center (SOC)	-34%	1,409	
22	Advanced Threat Protection (ATP)	17%	1,244	
23	Threat Prevention	45%	1,227	
24	Endpoint Detection and Response	-43 % ■	929	
25	Intrusion Detection	27%	581	
26	Unified Threat Management	-7%	1 41	

THE TOP 3 TOPICS WITH GREATEST SPIKING INTENT IN NAM ARE:

1. Cyberattack – 161,746 actively searching businesses	+34%
2. Malware Attacks - 121,486 actively searching businesses	-20%
3. Threat Actor - 95,337 actively searching businesses	-26%

THE TOP 3 TOPICS WITH GREATEST SPIKING INTENT IN EMEA ARE:

1. Cyberattack - 17,583 actively searching businesses	+22%
2. Malware Attacks - 13,768 actively searching businesses	-2%
3. Threat Actor - 12,388 actively searching businesses	-34%

TOP 3 SURGING 'MDR & XDR' CATEGORIES BASED ON % CHANGE IN THE PAST 3 MONTHS:

NAM:	EMEA:
EXTENDED DETECTION AND RESPONSE (XDR) +317%	NETWORK DETECTION AND RESPONSE (NDR) +524%
NETWORK DETECTION AND +218% RESPONSE (NDR	THREAT +134%
SECURITY BREACHES: +139%	EXTENDED DETECTION AND RESPONSE (XDR) +116%

Once you know what topics to talk about, it's important to ensure content titles are strong enough to immediately grab the attention of your prospects and encourage strong page views, open rates and click-through rates (CTRs).

Taking a deep dive into the top performing content and email subject lines in the digital marketing space as identified from our IFP first party data can help give an indication of what's working well at present:

TOP 5 PIECES OF CONTENT BY VIEWS:

- 1. 4 Ways XDR Levels Up Security Programs
- 2. Why XDR Is a Must Have for Organizations of Every Size
- 3. MDR vs The Inevitable: Breach Response Timelines from the Rapid7 SOC
- 4. Open XDR vs Native XDR: Not All Platforms are Created Equal
- 5. 10 Things Your MDR Service Must Do

TOP 5 PIECES OF CONTENT BY DWELL TIME:

- 1. 8 Benefits of MDR You Really, Really Need in the Current Threat Landscape
- 2. Top 5 Reasons You Should be Using MDR Services
- 3. Choosing an MDR Solution? It's Time to Consult this Must-Have Buyer's Guide
- 4 Open XDR vs Native XDR: Not All Platforms are Created Equal
- 5. EDR, MDR and XDR: What are the Differences?

TOP 5 PERFORMING EMAIL SUBJECT LINES:

- 1. EDR to XDR to ITDR: Making Sense of the Alphabet Soup
- 2. MDR Security: The Key to Cutting Down Your Breach Response Times
- 3. Top Ten MDR Must-Haves for Your Business
- 4. XDR: What is It and How Can Your Business Benefit?
- 5. The Four Ways XDR Can Level Up Your Security Program

STRUGGLING WITH CONTENT? GET IN TOUCH WITH OUR SPECIALIST CONTENT AND CREATIVE TEAM.

Contact Us

KEY TAKEAWAYS: HOW TO WIN

Using the above learnings, MDR & XDR vendors can form a sound understanding of how to win in this space – here's what the data is telling us:

- Extended Detection and Response (XDR) is the #1 ranked top 3 surging categories in NAM in the last 3 months, experiencing a 317% increase in searches. With the XDR market expected to grow 19% between 2023 and 2032, this is a key investment area for businesses and a product category where XDR vendors can obtain quick wins with a strong marketing strategy.
- Along with high numbers of search intent, content pieces on MDR are among the highest performers across views, dwell time, and open rates. The key benefits of Managed Detection and Response (MDR) that attracts readers is MDR security, which is reflected in '8 Benefits of MDR You Really, Really Need in the Current Threat Landscape'.
- Along with increasing automation, MDR and XDR vendors would do well to address and combat concerns around Malware Attacks and Threat Actors. 'MDR Security: The Key to Cutting Down Your Breach Response Times' and '4 Ways XDR Levels Up Security Programs' are two of the highest performers in the MDR & XDR category and reflect the pain points of IT professionals.
- Deciding on a new MDR or XDR solution and implementing into a tech stack is a challenge for mid-market IT teams with 50-60 security products and up to 130 in enterprises. Content based on the differences between the two types are popular as seen by 'Open XDR vs Native XDR: Not All Platforms are Created Equal' and 'EDR, MDR and XDR: What are the Differences?' Performing well for views and dwell time.

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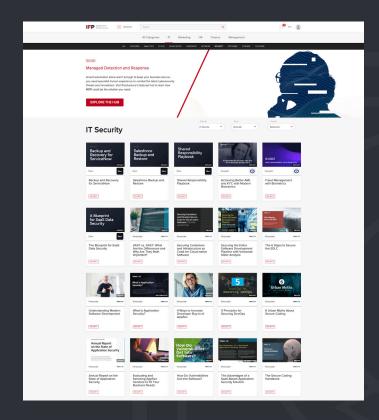
- Cyber insurers are anticipated to make a bold entry into the Managed Detection and Response (MDR) market, driven by a strong business focus on issues like Cyberattack, Malware Attack and Threat Actors. This move aims to actively shape policy recommendations and transform the landscape of the cyber insurance market.
- MDR and XDR vendors can enhance their revenue potential by emphasizing the advantages of their solutions. There is notable business interest in keywords related to issues address by MDR or XDR solutions. Content highlighting the benefits of these solutions is also gaining traction, as seen in the success of articles like '4 ways XDR Levels Up Security Programs', 'XDR: What is It and How Can Your Business Benefit?' and 'Choosing an MDR Solution? It's Time to Consult this Must-Have Buyer's Guide'.
- Vendor solutions continue to advance, incorporating additional capabilities to safeguard customers against a wide array of cyber threats. <u>Forbes</u> explores the evolution of EDR, MDR and XDR into a comprehensive solution known as MXDR. This holistic approach provides businesses with well rounded coverage. Content focusing on this trend has resonated with readers, with the subject line 'EDR to XDR to ITDR: Making Sense of the Alphabet Soup' emerging as a top-performing topic. This underscores the increasing interest in the integration of diverse solutions.



WHAT'S NEXT?

Now you know exactly what your in-market buyers are interested in and are actively searching, use these key insights backed by first-party data to guide your theme and content planning.

Data-driven targeting and content recommendations will help steer your marketing efforts in the right direction by understanding and addressing the greatest challenges facing marketers at present.



LOOKING FOR MORE MDR & XDR INSIGHTS?

DISCOVER THE IT SECURITY CATEGORY ON IFP.

Visit the Site

ABOUT INBOX INSIGHT

Inbox Insight uses market leading Insight and AI lead prioritization to accelerate your demand generation results.

Combining intelligence from first party data with third party intent scale, Inbox Insight help you gain a clear understanding of your market - then translate it into actionable Insight. When activated into multichannel programs, these Insights help capture, accelerate, and prioritize demand from the accounts you want to reach.

Demand More.

Get in touch to leverage these insights in your market. Contact Us.



About Insights for Professionals

IFP is our Buyer Education Platform that brings together professionals across multiple disciplines and sectors through the common goals of professional development and knowledge acceleration.

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