



Trust at the Core: How Service Providers Win by Embedding Security

F-Secure Webinar

Bill Lott & Tom Gaffney

Hosted by Olli Bliss



Welcome to Trust at the Core webinar!



Olli Bliss

Host and Sr. Business
Development Manager



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Director, Embedded
Security

The Scam Crisis in Numbers

2024

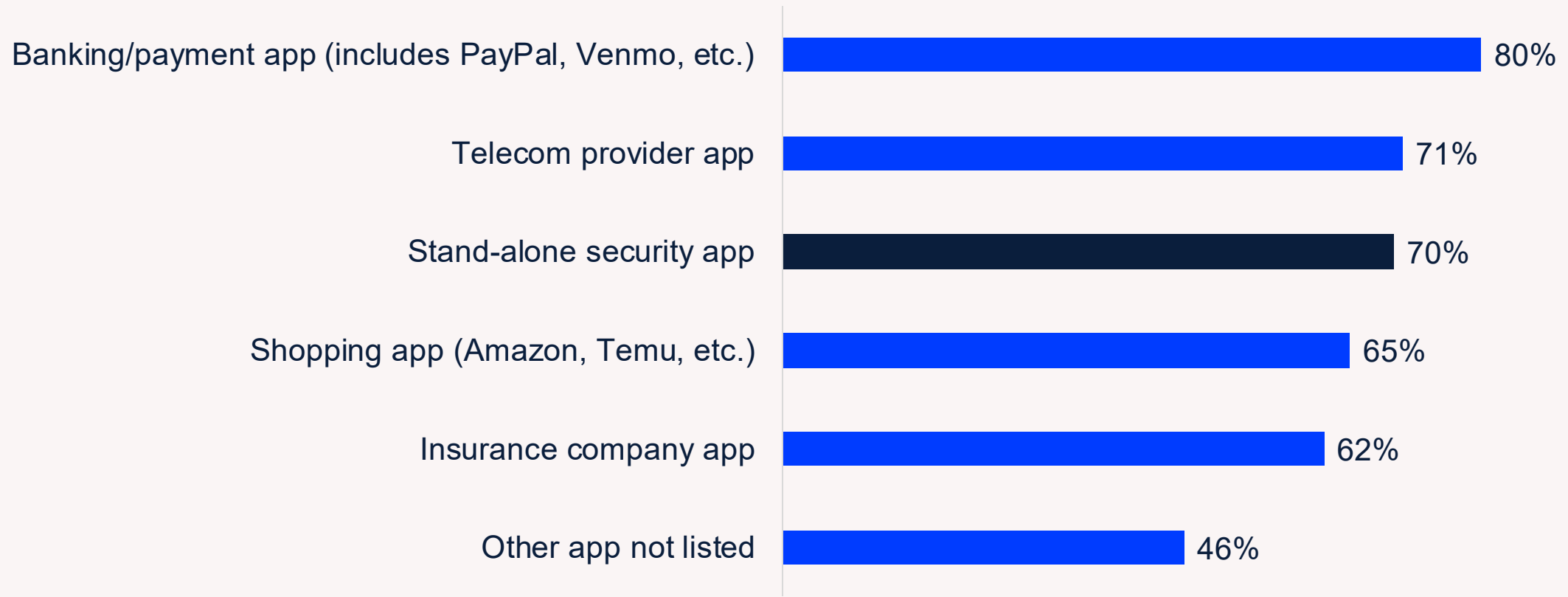


78% of respondents
experienced some form of
scam

\$1T reported lost
globally from scams

Consumers Trust Service Providers to Solve

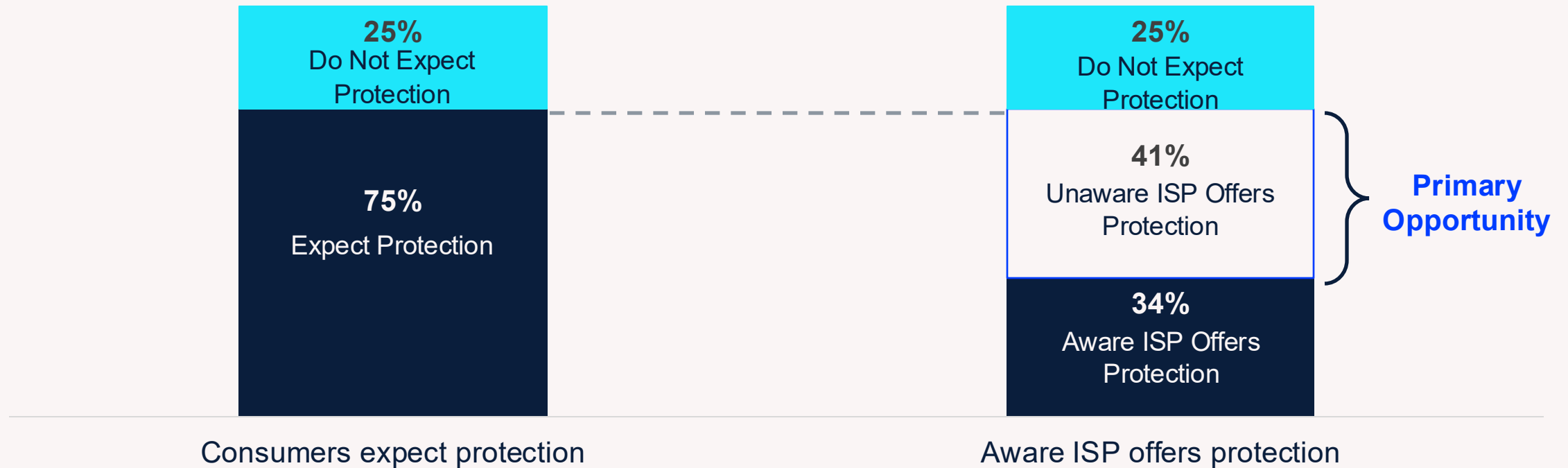
Which app would you prefer to get security from?
(Preferred + Would Consider Responses)



The Awareness Gap

Consumers want cybersecurity protection, but majority don't know where to get it

Gap between US consumer expectation of cybersecurity and awareness of Telco/ISP offerings
(% of total respondents)

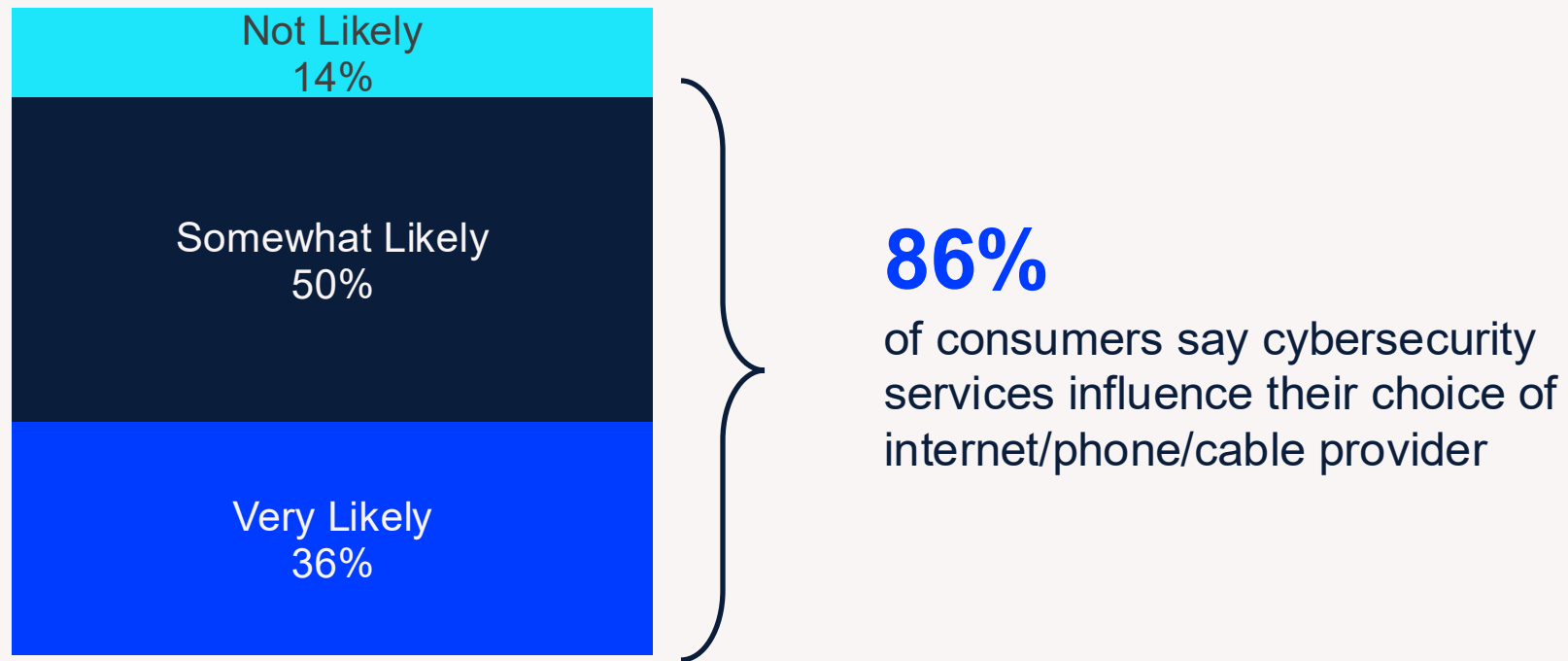


The Cost of Inaction

Increased risk of churn if offering is not competitive

US Consumer Study:

How likely are you to **choose an internet/phone/cable provider** based on the **cybersecurity or scam protection services** they offer?

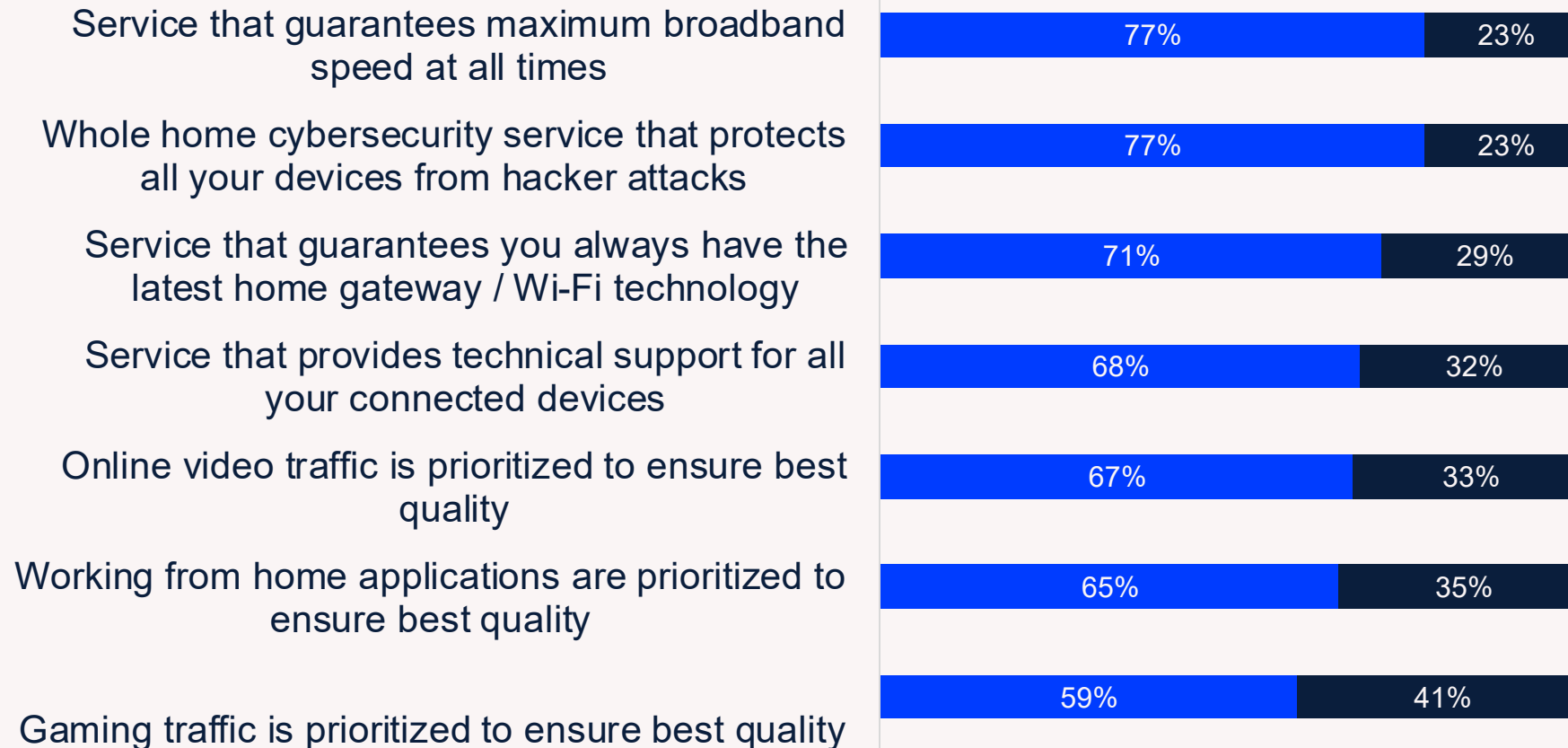


The Growth Opportunity

Consumers value cybersecurity as much as internet speed

Willingness to pay extra for additional features

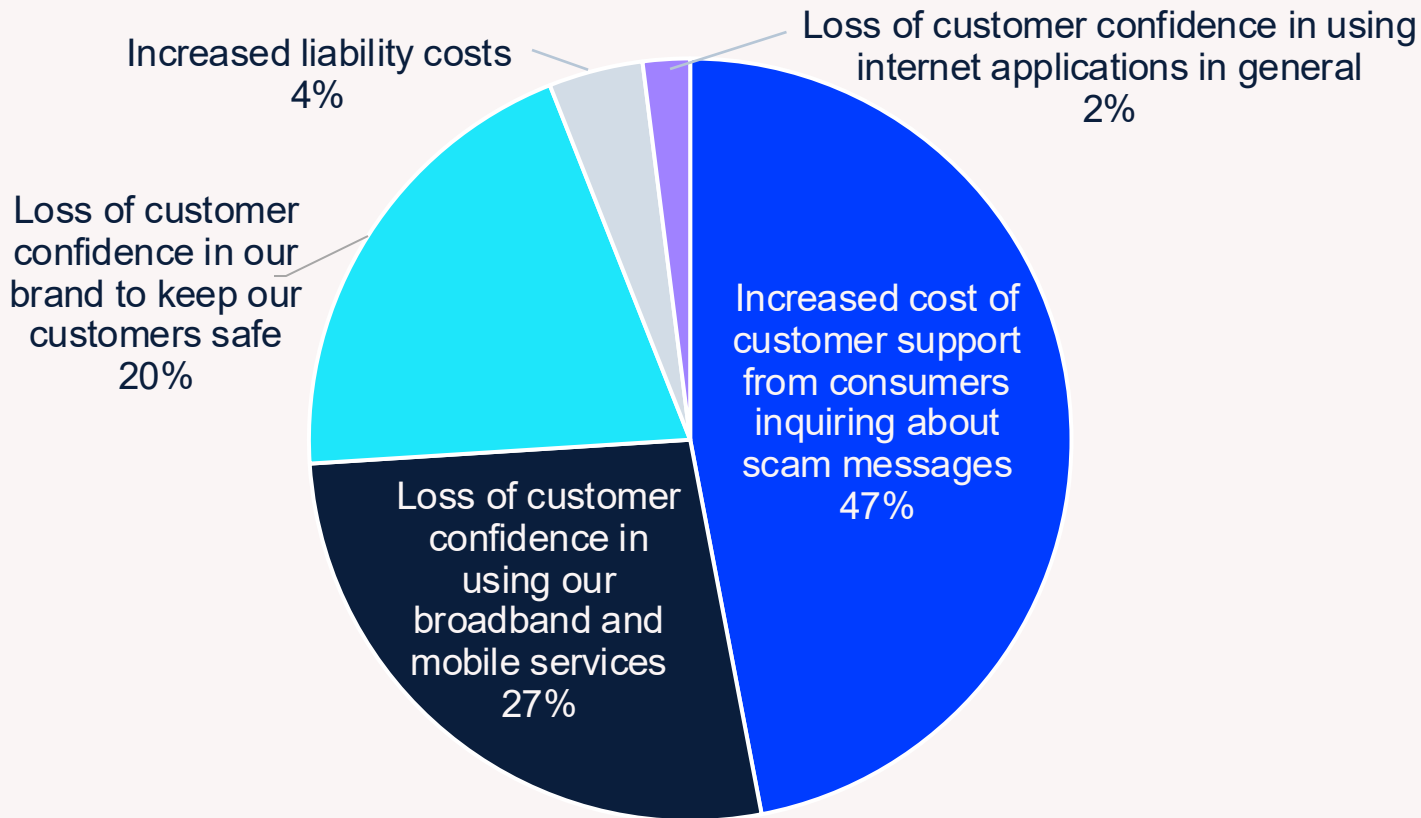
■ Would Pay ■ Would Not Pay



The Business Case for CSPs

Cybersecurity can be more than a cost center

From your company's perspective, what is the main impact of the rise in scams?



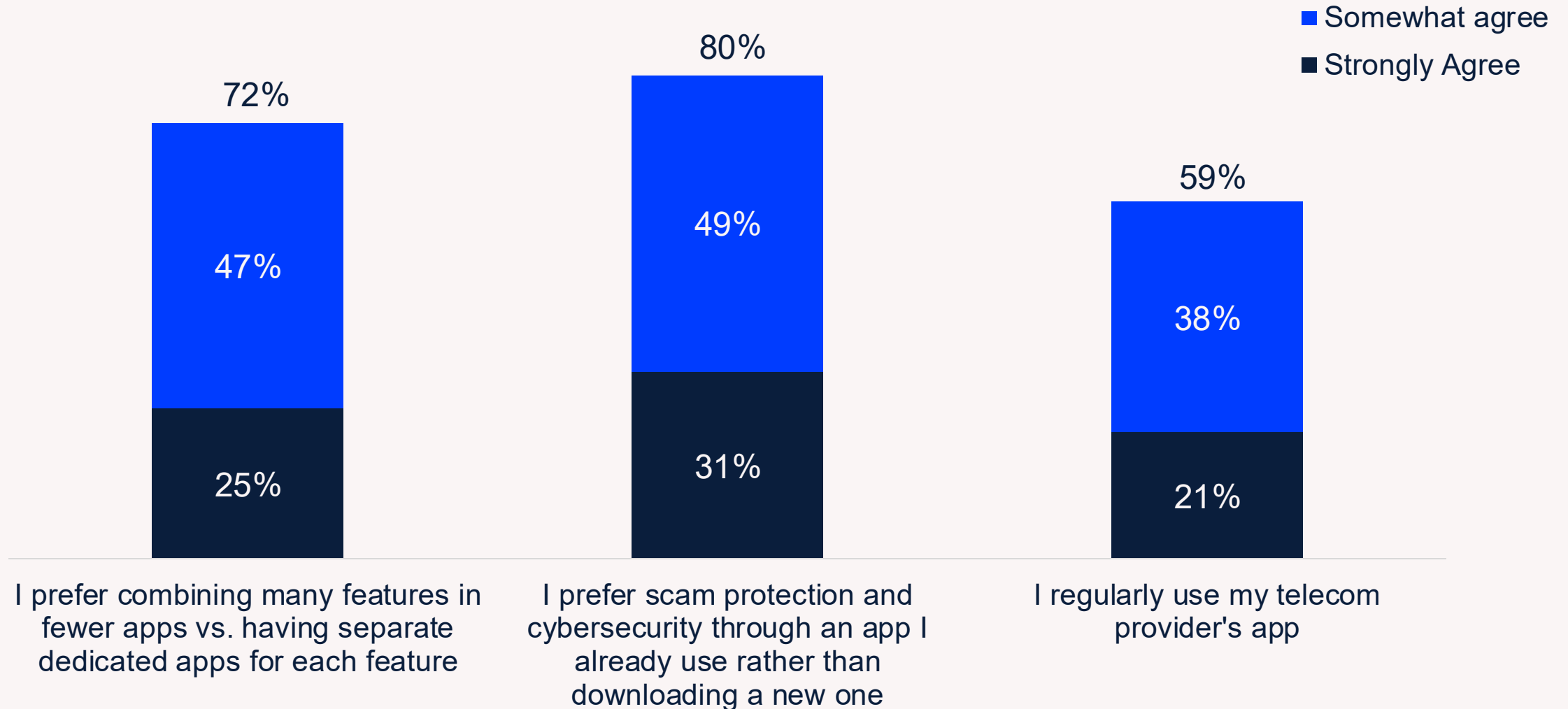
CSP decision maker view:

Cybersecurity Value Components

- Acquisition lift
- ARPU Lift
- Reduced churn
- Increased NPS
- Increased trust / brand
- Reduced fraud liability costs
- Reduced support calls

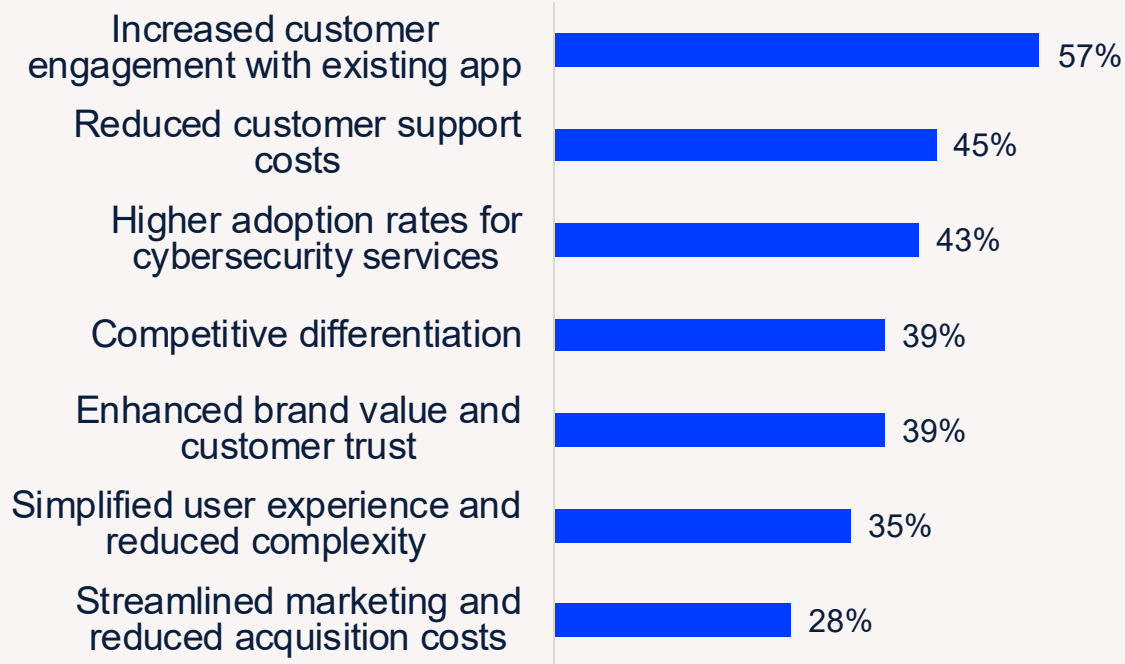
Why Embedding Security into Your App Works

Meet consumers where they're at



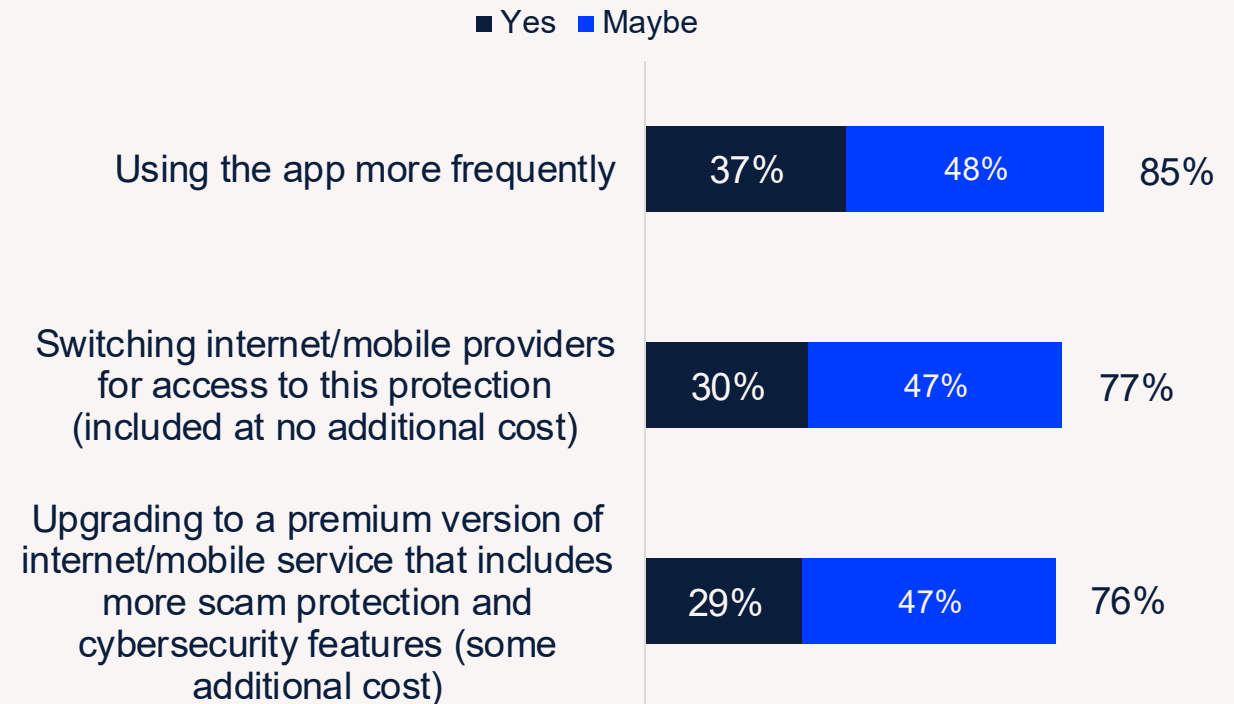
What CSP Executives Value

Omdia Research: What are the **primary benefits of embedding cybersecurity** features into your existing consumer app(s)



Source: "Digital Guardians: The CSP Advantage in Delivering Consumer Cybersecurity", Omdia 2025 | n=124

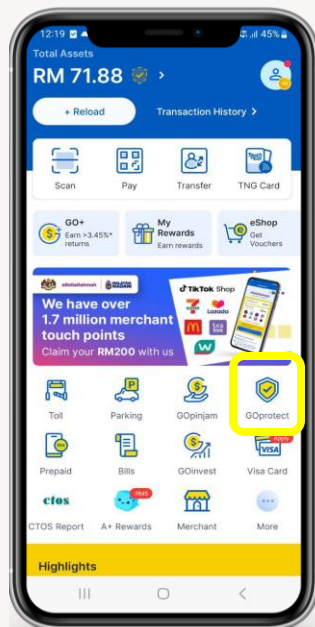
F-Secure Research: If scam protection and cybersecurity was included inside your preferred app, would you consider



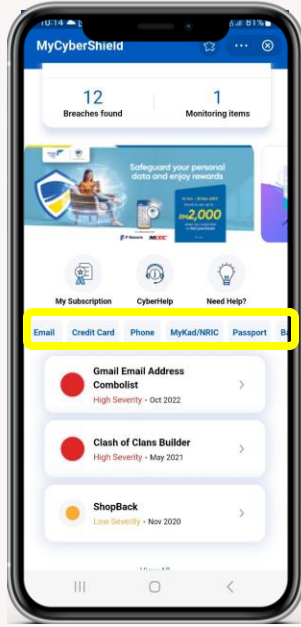
Source: F-Secure Global Market Research, n= 9,000, January 2025

The Telco Playbook

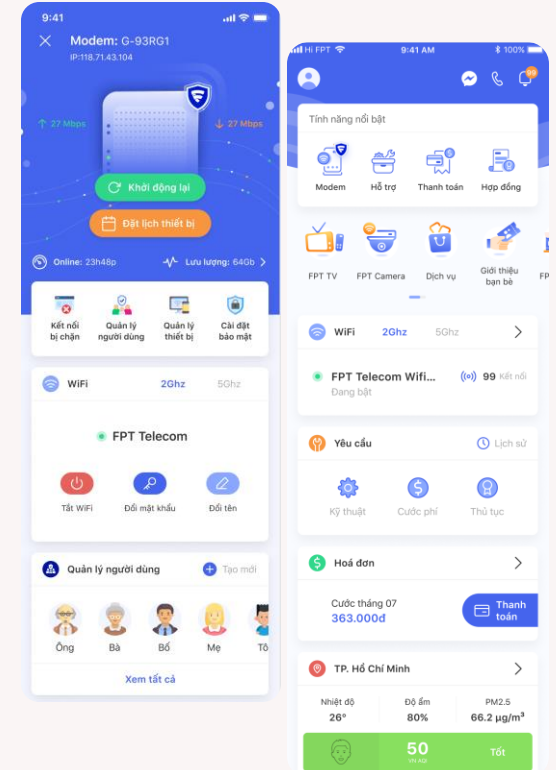
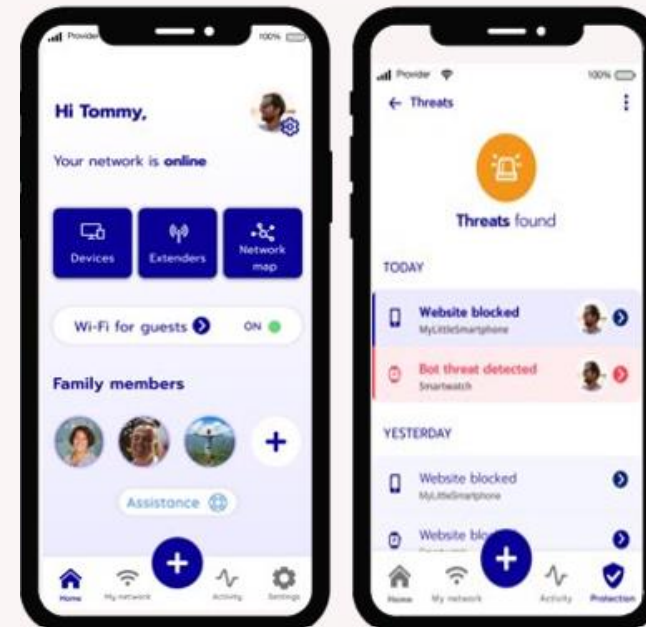
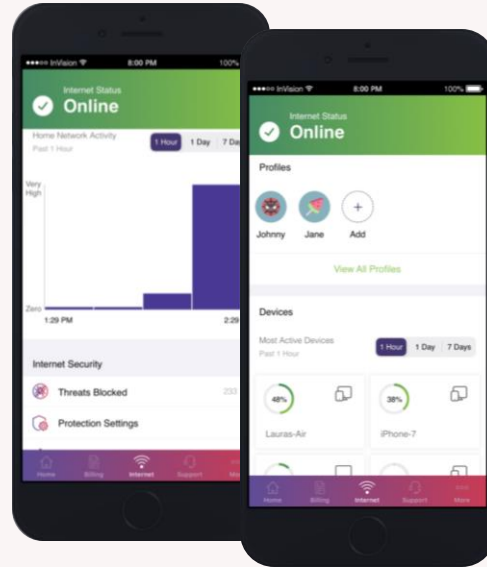
Examples of successful embedded security partners & solutions



Touch&Go
Protect

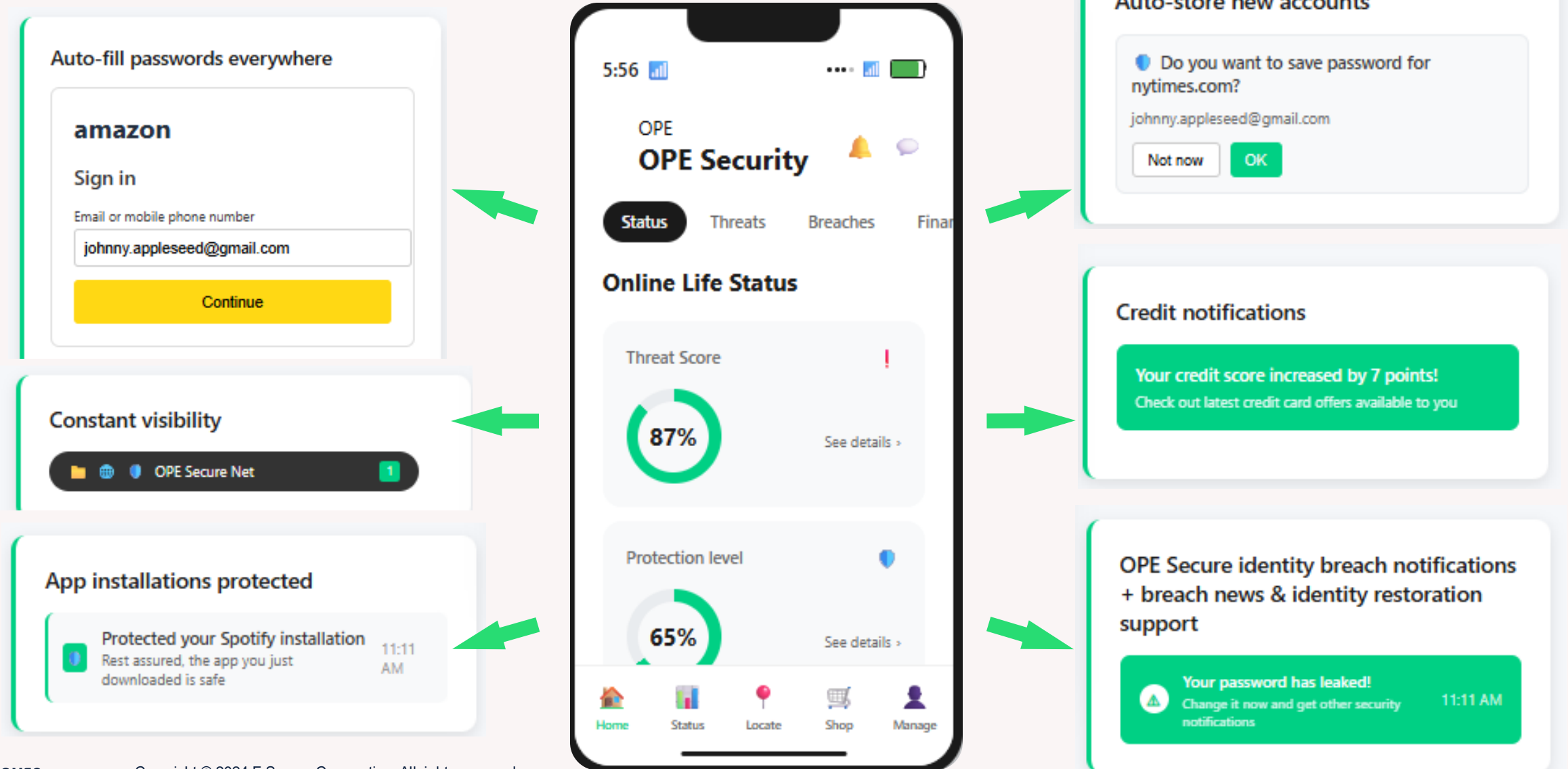


Identity
monitoring



Your OPE life protected

Protecting your digital moments against scams

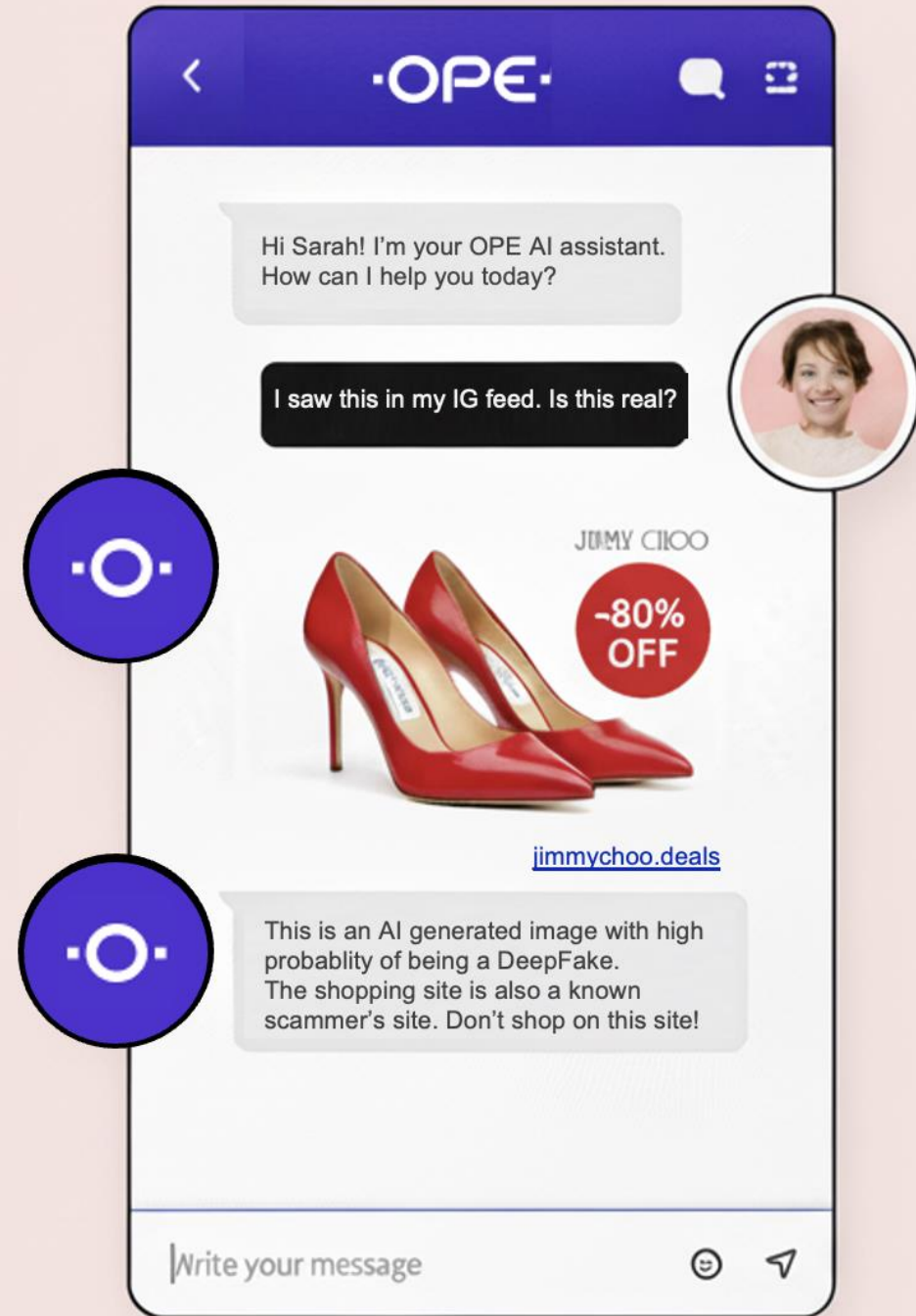


Your OPE life protected

Protecting your digital moments against scams

Example

Scam detection
embedded into
Partner chatbot



Pros & Cons of embedding security

Embedded vs. partner/white-label security solutions

Pros

- Full flexibility over product & features
- End-to-end ownership of consumer, design, and UX
- Ability to differentiate from market
- 100% brand alignment
- Reduced complexity / improved user experience
- Reduced friction points
- Deeper data insights and integration with existing services

Cons

- Slower time-to-market vs. stand-alone app
- Fully-fledged security apps / embedded security features can be resource heavy
- Requires strong in-house UX and design team
- Requires strategic buy-in from management to make SP mobile app the primary place to engage with customer
- Requires ongoing app maintenance



Thank you for joining today!

Please take our survey – we would love to have your feedback!
See you in the next F-Secure Webinar

More about how we help you stop scams at scale
[F-Secure.com/partners](https://www.f-secure.com/partners)