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A TECHNOLOGY MARKET RESEARCH FIRM

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Corporate Web Security Market, 2009-2013

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SCOPE

This study provides an analysis of the Corporate Web Security Market in 2009 and its potential growth over the next four years. It offers a detailed analysis of worldwide market trends, market size and growth forecasts, market share by vendor, vendor products and strategies, and more.

- The Web Security market is comprised of solutions that provide inbound and outbound security to business organizations, protecting against the myriad of threats that exist on the Internet today. These threats can include viruses, various forms of spyware, phishing attacks, and other types of malware.
- Solutions in this market can be deployed in multiple form factors, including software, appliances, and hosted models.
- The report focuses mainly on corporate deployments, which include government and educational organizations, but does not include service provider deployments.

All market numbers, such as market size, forecasts, installed base, and any financial information presented in this study represent *worldwide* figures, unless otherwise indicated. All pricing numbers are expressed in \$USD.

METHODOLOGY

The information and analysis in this report is based on primary research conducted by The Radicati Group, Inc. It consists of information collected from vendors, and users within global corporations via interviews and surveys.

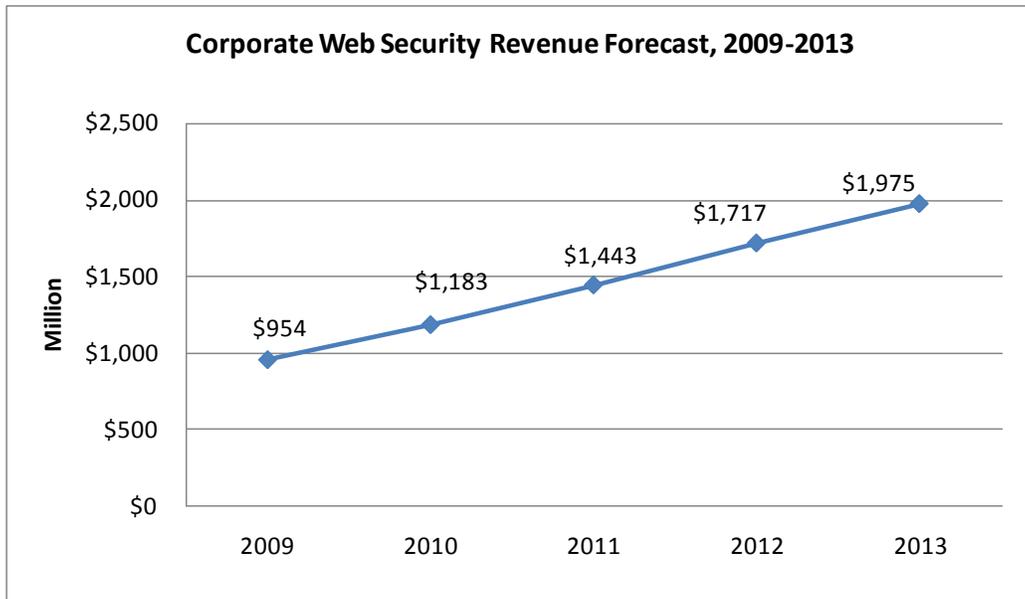
Secondary research sources have also been used, where appropriate, to cross-check the information collected. These include company annual reports and market size information from various market segments of the computer industry.

EXECUTIVE SUMMARY

- The primary driver for the Corporate Web Security Market is the need for organizations to reduce costs associated with Web threats. Web Security solutions protect corporate users and networks from Web-based malware, help prevent data loss, and enable organizations to control employee behavior on the Internet.
- A few years ago malware programs were mostly written as a prank. Today they are used for financial gain, to steal sensitive (mostly financial) information, or to find a new way to distribute spam messages. The damages are no longer restricted to the IT personnel's time needed to clean up the infection. Data loss is becoming a big concern for all organizations.
- Data loss can occur accidentally, intentionally, or through malware. Most large Web security vendors and service providers have added Data Loss Prevention (DLP) capabilities to their Web solutions over the past 12 months. Designed to prevent sensitive information from leaving the company, current solutions are not overly sophisticated. However, for Web security, most companies today find them adequate. Since the capabilities are very basic, they are offered as add-ons, rather than sold as stand-alone offerings.
- Making sure that employees don't spend too much time on personal matters on the Internet has always been a concern. Today, companies also have another added fear – legal liability for unsanctioned Web browsing. Organizations want to prevent users from looking at and distributing undesirable (and potentially litigious) Web-based material, including pornography, racial-based content, and other inappropriate content. A good Web security solutions should

enable companies to control what kind of Websites users can visit, how much time they can spend there, and what kind of content they can upload or download at those sites.

- Most vendors in this market target their solutions towards large organizations. This is not surprising, since Web security is still a relatively new market, and many companies (especially smaller ones) do not yet consider this technology a must-have. On the other hand, larger organizations are more security conscious, and take higher precautions to ensure that their networks are kept safe and malware-free.
- Appliances and software packages are still the most popular ways to deploy Web security solutions. However, the popularity of hosted Web security is spreading fast. These solutions are easy to deploy and maintain, and often offer better protection than software or appliances, as service providers are generally able to react to threats quicker than IT departments inside companies.
- Today, most Web security solutions are available as stand-alone products and services. In the nearest future, we expect to see them sold integrated with e-mail, and other corporate security offerings.
- The worldwide revenue for corporate Web security solutions is expected to grow from \$954 million in 2009 to over \$1.9 billion in 2013.



Corporate Web Security Market Revenue Forecast, 2009 – 2013

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