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A TECHNOLOGY MARKET RESEARCH FIRM

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Corporate Web Security Market, 2012-2016

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SCOPE

This study provides an analysis of the Corporate Web Security Market in 2012 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 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, cloud services, as well as hybrid solutions.
- This report focuses exclusively 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.

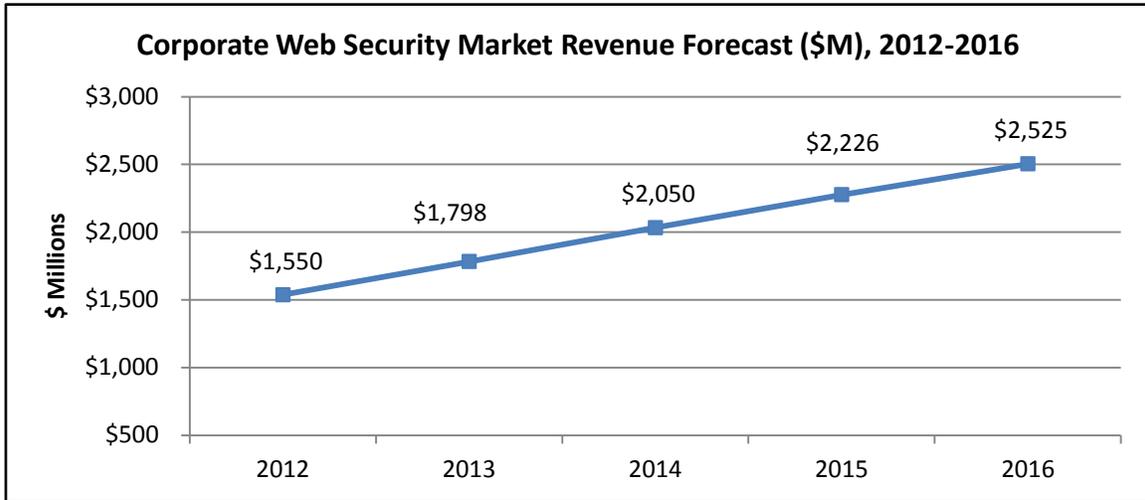
Secondary research sources have also been used, where appropriate, to cross-check the information collected. These include company annual reports and market size information from various market segments of the computer industry.

EXECUTIVE SUMMARY

- Web security is defined as any software, appliance, or cloud-based service that protects corporate users and networks from Web-based malware, enables organizations to control employee behavior on the Internet, and helps prevent data loss.
- Protecting against malware should be a high priority for all organizations since once inside a network, the propagation of malware can take down the entire network, effectively stopping most of the work inside an organization. Viruses, worms, and other self-propagating malware are especially dangerous because of their replicating characteristics. Once a host computer is infected, it can easily spread to other unprotected computers on a shared network.
- The cost of malware attacks has been trending up dramatically as more attacks happen each year. Solid Web security solutions are an essential requirement for companies to avoid this costly liability.
 - A survey of corporate users conducted in late 2011, revealed that 46% of users surveyed had experienced malware attacks in the past year, averaging 5.2 attacks per user/year. According to the survey, it took organizations an average of 3.9 hours to clean up each infection. This translates into an average cost of \$1,200 per user for a 1,000 user corporation.
- Granular controls for social media are becoming one of the most requested feature in Web security solutions as businesses and organizations are increasingly realizing the benefits of granting employee access to social media. In the past, social media controls were often binary and businesses would either completely block access or allow totally unregulated use. Many Web

security vendors now offer granular controls that allow businesses to provide a safe and controlled social media experience for users based on different needs and policy criteria.

- Web security vendors sometimes also offer a full-featured DLP suite that protects data in motion, in use, and at rest. On the other hand, native DLP capabilities that are included in a Web security solution are often severely lacking when compared to pure-play DLP solutions since they usually only monitor data in motion. Native DLP capabilities in most Web security solutions are usually limited to application blocking and keyword blocking.
- Web security solutions come in a variety of deployment options, but virtualized appliances are growing in popularity. Vendors that do not offer a virtualized solution are either entirely cloud-based, or are planning to implement a virtualized solution in the near future.
- Hybrid solutions are also becoming more popular, but most customers still tend to prefer an entirely on-premises or cloud-based deployment. Most hybrid solutions still have separate management interfaces for the on-premise and the cloud-based deployments, which makes management of hybrid deployments somewhat cumbersome.
- In 2012, the majority of corporate Web security revenue is generated by large and very large organizations. Small and medium businesses, however, will start deploying more Web security solutions, as overall pricing for basic packages become more affordable. More solutions will also become available as cloud services, which are easier to deploy and manage for smaller organizations.
- The worldwide revenue for corporate Web security solutions is expected to grow from over \$1.5 billion in 2012, to over \$2.5 billion in 2016.



Corporate Web Security Market Revenue Forecast, 2012 – 2016

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