



THE RADICATI GROUP, INC.

A TECHNOLOGY MARKET RESEARCH FIRM

1900 EMBARCADERO ROAD, SUITE 206. • PALO ALTO, CA 94303

TEL. 650 322-8059 • FAX 650 322-8061

Endpoint Security Market, 2013-2017

Editor: Sara Radicati, PhD

SCOPE

This study provides an analysis of the business Endpoint Security market in 2013 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 Endpoint Security market is comprised of solutions that provide security to all endpoints in organizations, protecting against the myriad of threats that exist in today's digital world. These threats can include viruses, malware, data loss, inbound network intrusion attempts, and much more.
- 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 business endpoint security solutions. It does not include consumer endpoint security solutions.
- Government organizations are considered "corporate organizations" for the purposes of this report.

EUROPE: 29E FITZJOHNS AVE • LONDON NW3 5JY • TEL. +44 (0)207 794 4298 •

FAX. +44 (0)207 431 9375

e-mail: sara@radicati.com

<http://www.radicati.com>

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 are based on primary research conducted by The Radicati Group, Inc. Our proprietary methodology combines information derived from three principal sources:

- a. Our Worldwide Database which tracks user population, seat count, enterprise adoption and IT use from 1993 onwards.
- b. Surveys conducted on an on-going basis in all market areas which we cover.
- c. Market share, revenue, sales and customer demand information derived from vendor briefings.

Forecasts are based on historical information as well as our in-depth knowledge of market conditions and how we believe markets will evolve over time.

Finally, secondary research sources have also been used, where appropriate, to cross-check all the information we collect. These include company annual reports and other financial disclosures, industry trade association material, published government statistics and other published sources.

Our research processes and methodologies are proprietary and confidential.

EXECUTIVE SUMMARY

- Endpoint security solutions offer organizations a way to monitor, manage, and protect all the endpoints on their network. The most common endpoints requiring protection have traditionally been desktop computers and laptops. Endpoints, however, can also include a variety of other computing devices, such as servers on the network or in the cloud, virtual desktops, credit card readers, removable disk drives or USB devices,

and more. Increasingly, smartphones, tablets, and any form of mobile devices are also being protected via endpoint security solutions as the use of these devices continues to grow in the enterprise.

- Malware protection is still a high priority for all organizations since once inside a network, malware can propagate and take down an entire corporate 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 one endpoint is infected, it can easily spread to other endpoints on the same network.
- A 2013 survey of corporate organizations¹, showed that organizations are still getting an average of 2.4 infections per month and spending an average of 1.6 hours per infection to cleanup.
- Endpoint security solutions are increasingly serving as the base for a unified corporate security deployment that includes DLP, Web security, email security, mobile device security, and more. Some vendors are able to offer all of this functionality in one deployment with one management interface.
- Mobile devices are increasingly an endpoint that needs to be protected. Most endpoint security solutions, however, do not offer protection for mobile endpoints, such as smartphones and tablets, as a standard feature. It is still common for many vendors to view mobile endpoint protection as a completely separate security solution to be offered through their Mobile Device Management (MDM) products.
- Endpoint security solutions are increasingly incorporating some form of Data Loss Prevention (DLP) features in their solution. While most of these should be considered “DLP lite” as they do not provide deep content inspection, they are nevertheless a growing area of differentiation among vendors.
- All security vendors are increasingly offering cloud-based options for their endpoint security deployments, some vendors offer only cloud-based solutions. The growing interest in cloud-based deployments is driven by cost, ease of use and administration, and

¹ Business User Survey - 2013, August 2013, The Radicati Group, Inc.

an increasingly mobile workforce where users work from home or while on the road and need quick, secure access to the business network.

- The market for endpoint security solutions continues to show steady growth year over year as more organizations gain a better understanding of their security needs, re-evaluate their vendors and invest in new, typically higher function endpoint security solutions.
- Worldwide revenue for business endpoint security solutions is expected to continue to increase at an average rate of 12% a year, growing from \$3.6 billion in 2013, to more than \$5.8 billion in 2017.

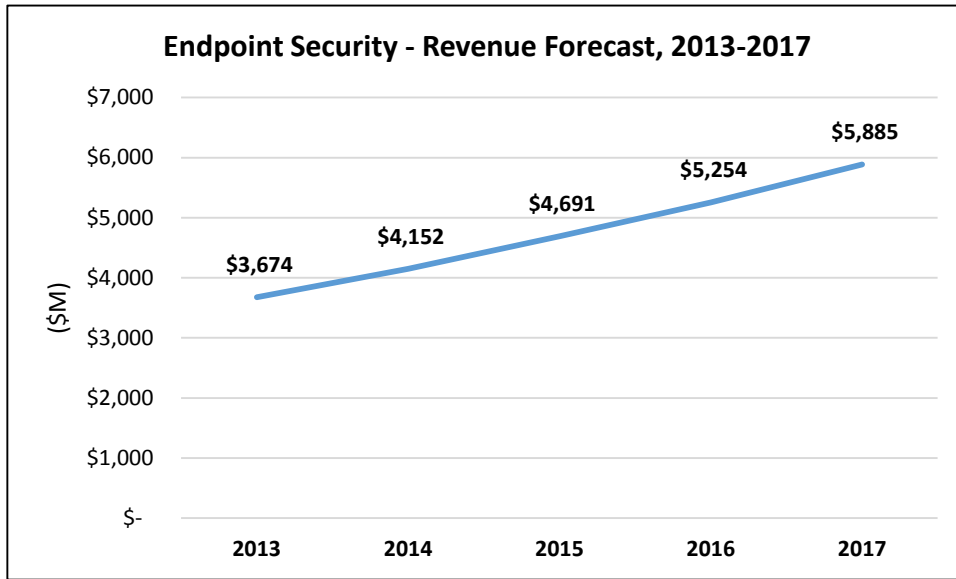


Figure 1: Endpoint Security Revenue Forecast, 2013 – 2017

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