



THE RADICATI GROUP, INC.
A TECHNOLOGY MARKET RESEARCH FIRM
PALO ALTO, CA 94301
TEL. 650 322-8059 • FAX 650 322-8061

Corporate Web Security Market, 2014-2018

SCOPE

This study provides an analysis of the Corporate Web Security market in 2014 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 Corporate Web Security market is comprised of solutions that provide inbound and outbound security to organizations, protecting against the many 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.

EUROPE: LONDON NW3 5JY • TEL. +44 (0)20 7794 4298 • FAX. +44 (0)20 7431 9375

Email: sara@radicati.com

<http://www.radicati.com>

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

- Corporate Web Security is defined as any software, appliance, or hosted 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. Malware can include viruses, spyware, adware, rootkits, and more. Corporate Web Security solutions can be deployed on-premises, in the cloud, or as hybrid solutions.
- The majority of malware infections are based around stealing confidential information from organizations and users. Malware is often motivated by malicious intentions, such as financial gain or espionage. Malware, however, can also be motivated to simply disable an organization or for prank playing. Regardless of intent, malware can lead to financial loss, productivity loss, and other problems, that the enterprises face today.

- A survey of corporate users conducted in 2014¹, showed users on average, experience 2.4 malware infections per year. Each of these incidents takes an average of one hour and 36 minutes to clean up. Based on this data, a 1,000-user company is estimated to have 2,400 malware attacks each year, which translates to a total cost of nearly \$0.5 million each year in lost user productivity time and IT clean up costs. This works out to an average annual cost of \$500 per user.
- Cloud based Web Security solutions are seeing stronger demand. Organizations that traditionally deployed on-premises solutions are increasingly moving all their services to the cloud. Hybrid solutions are often viewed as a stepping-stone to moving from on-premises to cloud-based deployment, and are also seeing strong growth.
- Web access continues to be the most prevalent method through which malware creeps into an organization. Websites are bloated with nested objects that most users pay little attention to. Each of these elements on a webpage can be pulled from a different domain, and one webpage can easily have dozens of domains that it pulls from.
- Threats are continuing to become more targeted and personal. Blended attacks which present users with some information they recognize and request that they connect to a site to input more information are becoming more prevalent and highly successful.
- The growing threat landscape continues to drive the need for Corporate Web Security solutions. The worldwide market for Corporate Web Security solutions is expected to grow from over \$1.7 billion in revenues 2014, to over \$2.7 billion in revenues in 2018.

¹ Survey – “Email Statistics Report, 2014-2018”, The Radicati Group, Inc.

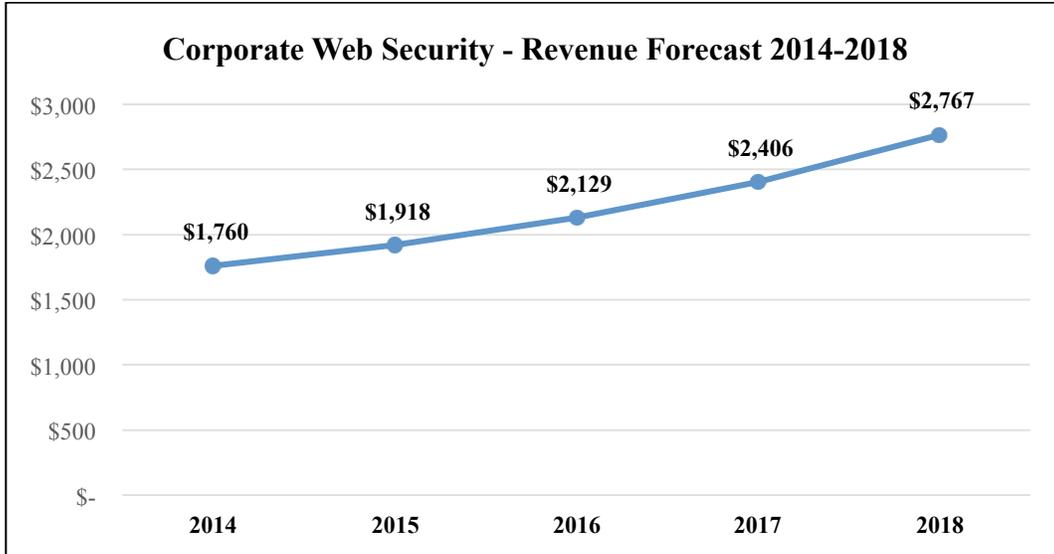


Figure 1: Corporate Web Security Market Revenue Forecast, 2014 – 2018

***To view the complete Table of Contents for this report,
visit our website at www.radicati.com.***