Enterprise Data Loss Prevention Market, 2017-2021

SCOPE

This study covers the Enterprise Data Loss Prevention (DLP) market in 2017 and its expected evolution 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.

Data Loss Prevention is the supervision and management of electronic data that enables organizations to prevent non-compliant information transfer activity from occurring. Enterprise DLP solutions monitor data in motion, data in use, and data at rest on corporate servers, desktops, laptops, and other endpoints.

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. 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

- Enterprise Data Loss Prevention (DLP) solutions are data supervision and management solutions that enable organizations to prevent non-compliant information sharing. DLP solutions monitor data in an organization in accordance with policies created to block, quarantine, warn, encrypt, and perform other actions that maintain the integrity and security of data. DLP solutions monitor three types of data: data in use, data in motion, and data at rest.

- We distinguish between three types of enterprise DLP solutions:

  o *Full DLP solutions* – protect data in use, data at rest, and data in motion and are "aware" of content that is being protected. A full-featured content-aware DLP solution looks beyond keyword matching and incorporates metadata, role of the employee in the organization, ownership of the data, and other information to determine the sensitivity of the content. Organizations can define policies to block, quarantine, warn, encrypt, and perform other actions that maintain the integrity and security of data.

- o *Channel DLP solutions* – typically enforce policies on one specific type of data, usually data in motion, over a particular channel (e.g. email). Some Channel DLP solutions are content-aware, but most typically rely only on keyword blocking.

- o *DLP-Lite solutions* – are add-ons to other enterprise solutions (e.g. information archiving) and may or may not be content-aware. DLP-Lite solutions will typically only monitor data at rest, or data in use.

- This report deals only with full, content-aware DLP solutions, as defined above. Channel DLP and DLP-Lite solutions <u>are not</u> included in this report as they are usually purchased as a component of a broader security or data retention solution (e.g. Information Archiving).

- The enterprise DLP market continues to show strong growth as organizations of all sizes, worldwide are concerned about accidental or intentional data loss prevention. In addition, laws that mandate the disclosure of data breaches of customer data, compliance with government and industry regulations, as well as recent regulations such as the European General Data Protection Regulation (GDPR) and the EU-US Privacy Shield are increasingly affecting organizations of all sizes across all verticals. Against a backdrop of increased risk and growing regulations, organizations of all sizes are investing heavily in DLP solutions to protect data and ensure compliance.

- The worldwide revenue for enterprise DLP solutions is expected to grow from $970 million in 2017, to over $1.4 billion by 2021.

DLP - Revenue Forecast, 2017-2021
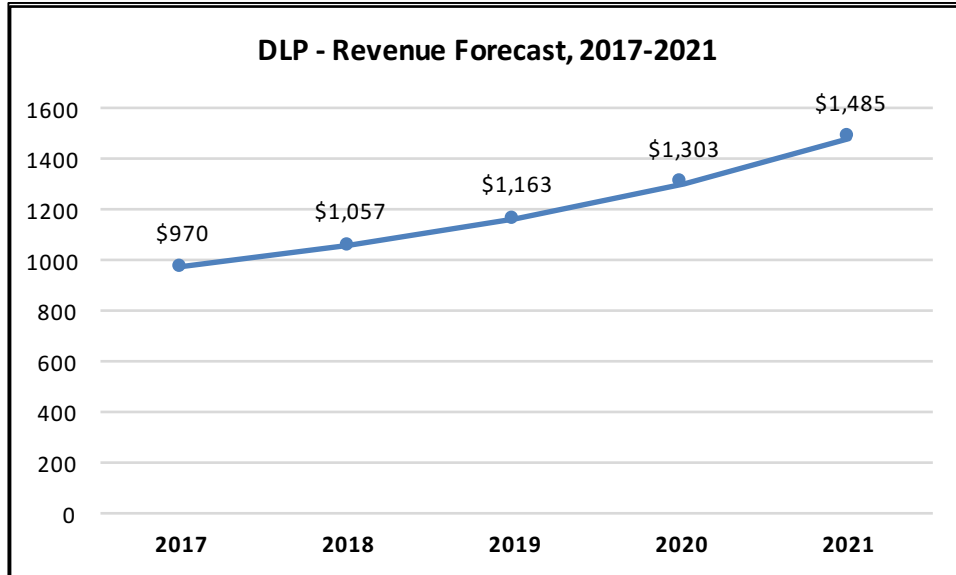
Figure 1: DLP Revenue Forecast, 2017 – 2021

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