

THE RADICATI GROUP, INC.
A TECHNOLOGY MARKET RESEARCH FIRM

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Endpoint Security Market, 2018-2022

SCOPE

This study provides an analysis of the business Endpoint Security market in 2018 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 secure 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.
- 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.

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.

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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

- Endpoint protection solutions are designed to enable organizations to monitor, manage, and protect all endpoints on their networks. Endpoint security solutions must be able to prevent, detect, block and remediate all threats to endpoint computing devices. Often these solutions also offer deep forensic capabilities, as well as managed services for threat hunting and neutralization. Endpoints include desktop computers, laptops, and a myriad of other computing devices, such as mobile phones and tablets, servers, virtual desktops and servers, removable disk drives or USB devices, credit card readers, IoT devices, and more.
- The line between traditional endpoint solutions and next generation endpoint solutions no longer exists as nearly all vendors now offer behavior-oriented solutions which include

endpoint detection and response (EDR), threat intelligence management, sandboxing, advanced persistent threat (APT) protection, forensic analysis and more. Increasingly many vendors also offer managed professional services for in-depth threat hunting, forensics and remediation activities.

- Organizations of all sizes, no longer view endpoint security as an isolated discipline affecting only the endpoint but as an integral part of an organization-wide defense posture, where endpoint security shares threat intelligence feeds and policy controls with all other major security components, including firewalls, secure web gateways, secure email gateways, data loss prevention (DLP), and more.
- Adoption of endpoint security solutions continues to see strong growth as organizations of all sizes are investing heavily to protect against a growing landscape of threats and malicious attacks.
- The worldwide market for business Endpoint Security solutions is expected to grow in revenues from \$6.4 billion in 2018, to over \$13.1 billion by 2022. An annual growth rate of 20%.

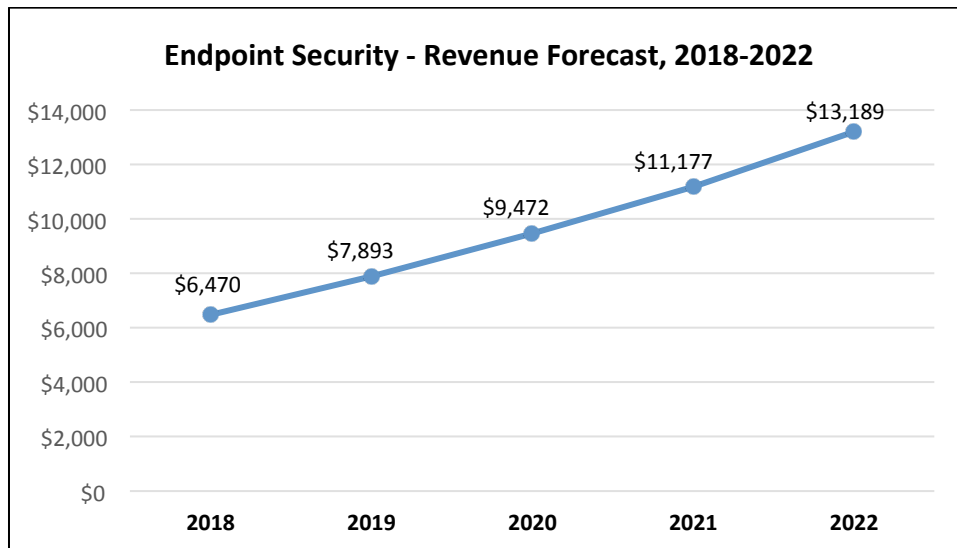


Figure 1: Endpoint Security Revenue Forecast, 2018 – 2022

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