Enterprise Data Loss Prevention Market, 2018-2022

SCOPE

This study covers the Enterprise Data Loss Prevention (DLP) market in 2018 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.
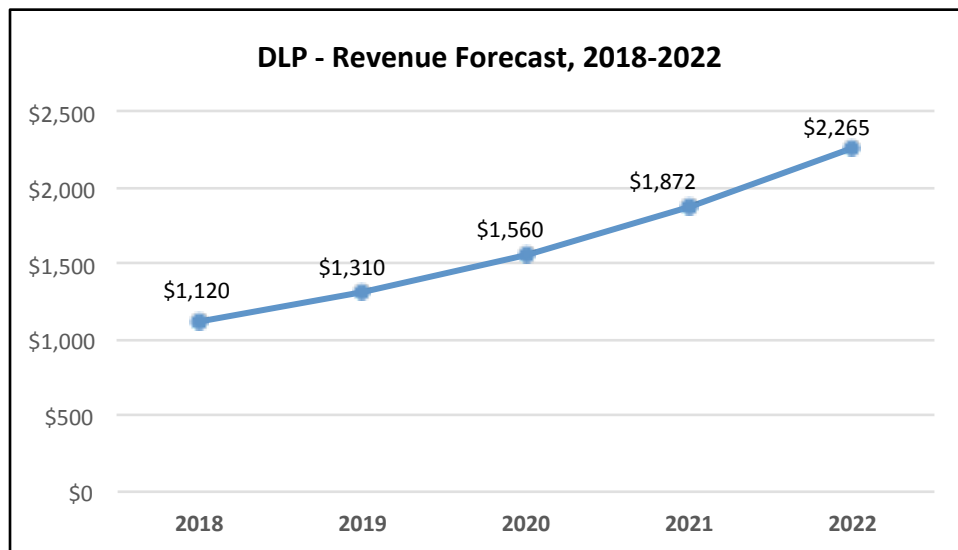
Finally, secondary research sources have also been used, where appropriate, to cross-check all the information we collect. These include company annual reports and other financial disclosures, industry trade association material, published government statistics and other published sources.

Our research processes and methodologies are proprietary and confidential.

EXECUTIVE SUMMARY

- Data Loss Prevention (DLP) solutions are appliances, software, cloud services, and hybrid solutions that provide electronic data supervision and management to help organizations prevent non-compliant information sharing. These solutions serve to protect data at rest, data in use, and data in motion.

- DLP solutions also provide an important trail of evidence in case of an audit to prove that an organization's data is in line with compliance or privacy laws and regulations. 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 how organizations of all sizes across all verticals protect data.

- We distinguish between three types of DLP solutions:

  o *Full DLP solutions* – are "content-aware" and help protect data in use, data at rest, and data in motion.

    o   *Channel DLP solutions* – typically enforce policies on a specific type of data (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. Compliance and Data Governance) and may or may not be content-aware.

- This report deals only with Full DLP solutions, as defined above. Channel DLP and DLP-Lite solutions are not covered as they are usually purchased as a component of a broader security or data retention solution (e.g. Email, Compliance and Data Governance, or other).

- External threats to data exists in a myriad of forms through advanced persistent threats (APT), espionage, and other attempts to gain unauthorized access to data. While external threats are a problem, data loss from internal threats is also a significant concern. Internal data loss can be malicious, such as a disgruntled worker copying sensitive data to a flash drive, or it can be the result of negligence due to an honest mistake, such as an employee sending a customer list to a business partner that shouldn't have access to it.

- The worldwide revenue for enterprise DLP solutions is expected to grow from $1.1 billion in 2018, to over $2.2 billion by 2022.

DLP - Revenue Forecast, 2018-2022

Year	Revenue
2018	$1,120
2019	$1,310
2020	$1,560
2021	$1,872
2022	$2,265

Figure 1: DLP Revenue Forecast, 2018 – 2022

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