



THE RADICATI GROUP, INC.

A TECHNOLOGY MARKET RESEARCH FIRM

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Secure Email Gateway Market, 2019-2023

SCOPE

This study provides an analysis of the Secure Email Gateway market in 2019 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 Secure Email Gateway market consists of solutions that can be deployed at the mail server or SMTP gateway level to filter out spam, viruses, phishing/spear-phishing attacks, and other malware from messaging traffic. Data Loss Prevention (DLP) and email encryption are also often part of a complete Secure Email Gateway solution.

This report focuses exclusively on corporate deployments, which include civilian government organizations and educational institutions. It 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.

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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

- As email continues to be the leading vector for malware attack and penetration, organizations of all sizes are investing heavily in the deployment of Secure Email Gateway solutions to guard against all forms of email-borne threats, including spam, viruses, phishing and spear-phishing attacks.
- Secure Email Gateways are software, appliances, or cloud services that protect organizations against email related threats by filtering out spam, viruses, and other malicious or unwanted messages. These solutions also deal with phishing attacks (email-borne attempts to gather sensitive information, such as passwords, credit card numbers, etc.), spear-phishing (targeted phishing attacks), URL manipulation (emails carrying links that lead to corrupted websites), compromised attachments, and

account takeover.

- The Secure Email Gateway market continues to see investment and innovation from all vendors due to the need to keep up with evolving email-borne threats and the critical importance of feeding email attack/malware detection information to broader enterprise-wide security services (e.g. ATP, endpoints, Web Gateways, and more).
- Vendors of Secure Email Gateway solutions are increasingly adding Data Loss Prevention (DLP), email encryption, and integrating Endpoint Detection and Response (EDR), Advanced Threat Prevention (ATP), and Phishing Awareness Training solutions, and more into their offerings.
- Technology alone cannot do everything, end users must also be trained in safe online behavior and in particular in detecting suspicious emails which may pose a threat. To this effect, a great deal of effort has now been placed on automated anti-phishing training techniques that help train users in safe behavior as well as help assess potentially risky users. Many vendors of secure email gateway solutions now also offer Phishing Awareness Training solutions, either fully integrated with their offerings or as an add-on solution.
- The worldwide revenue for Secure Email Gateway solutions is expected to top \$2.7 billion in 2019, and grow to over \$4.3 billion by 2023.

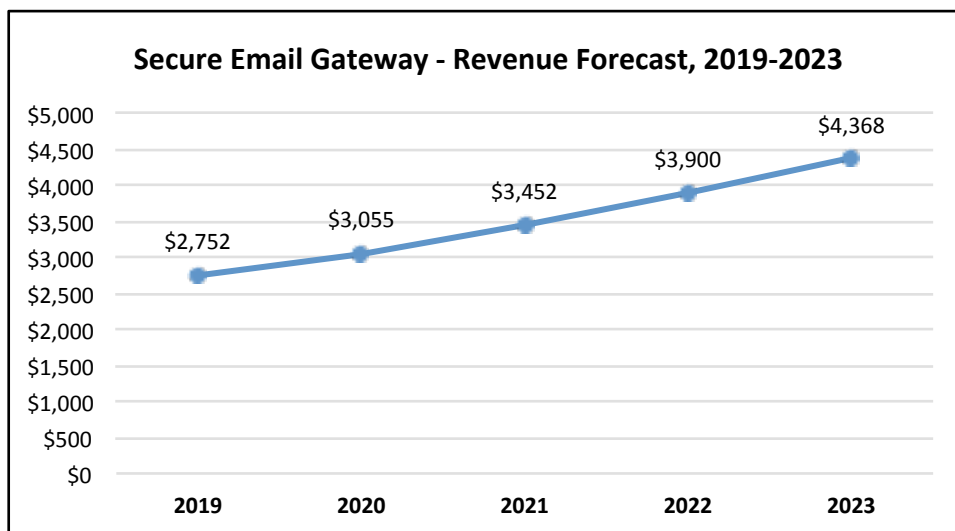


Figure 1: Secure Email Gateway Market Revenue Forecast, 2019 – 2023

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