



IDC MarketScape

IDC MarketScape: Worldwide Email Security 2016 Vendor Assessment

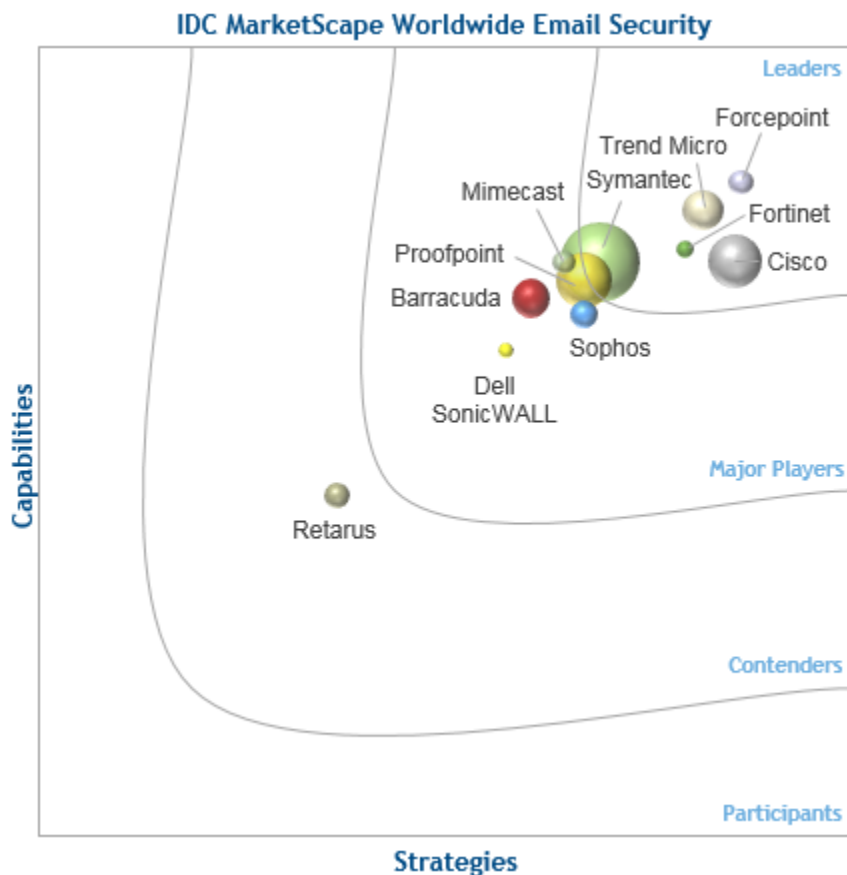
Elizabeth Corr

THIS IDC MARKETSCAPE EXCERPT FEATURES: TREND MICRO

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Email Security Vendor Assessment



Source: IDC, 2016

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Email Security 2016 Vendor Assessment (Doc # US41943716). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

The email security market is a mature market that is experiencing an influx of new features to deal with the adapting threats. Vendors are also dealing with the new interaction between email and other applications in business management solutions such as Office 365. Vendors need to be providing subscription-as-a-service (SaaS) and hybrid offerings alongside traditional software-on-premise and physical appliance solutions as many email products move to the cloud. As malicious actors spend more time on social engineering to create targeted attacks that would lead employees to be more likely to click on links or transfer funds, email security solutions need to be better than ever at blocking these targeted attacks. Anti-spear phishing, antiwhaling, and specialized threat analysis and protection (STAP) features are the best techniques to prevent these targeted attacks. Further:

- Email is one of the most common attack vectors inside an organization, so companies need to be able to rely on their security products.
- Companies should be looking for adaptable solutions that provide a breadth of feature and platform offerings where the email security products can be set up and work simply within the organization.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This IDC MarketScape includes vendors that are in the traditional email security gateway category, which includes features like antimalware, antispam, and content filtering for emails that come to the company. Vendors were also viewed across multiple platforms including physical appliances, software-on-premise, software as a service, hybrid, and virtual appliances. Other inclusion criteria include vendors with offerings sold on a worldwide scale (i.e., not focused on a particular region or geography) and vendors listed with at least \$10 million dollars in worldwide product revenue. Further:

- **Full email security gateway capabilities.** Each email gateway vendor is required to possess full email security capabilities and support either full SaaS, on-premise, or physical appliance deployment models.
- **Revenue.** Each email security vendor is required to have total global email security revenue in excess of \$10 million that was attained in 2015.
- **Date of analysis.** The email security vendor analysis in this study was written as of July 2016.
- **Data loss prevention.** Each email gateway vendor is required to have at least a data loss prevention technique available in their base product or as an add-on.
- **Geographic presence.** Each email gateway vendor is required to have a global presence.

Vendors included in this IDC MarketScape are Barracuda, Cisco, Dell SonicWALL, Forcepoint, Fortinet, Mimecast, Proofpoint, Retarus, Sophos, Symantec, and Trend Micro.

ESSENTIAL BUYER GUIDANCE

This IDC MarketScape assesses the current Leaders, Major Players, and Contenders in the worldwide email security market and rates these vendors based on the criteria most important to small, medium-sized, and large businesses and enterprise customers. Key factors companies must consider when selecting an email security vendor include:

- **Breadth of capabilities.** These capabilities include but are not limited to URL and document scanning, STAP features, mobile features, data loss prevention (DLP) features, and anti-spear phishing.
- **Range of delivery models.** This is the ability to offer hardware, software-on-premise, SaaS, and hybrid offerings.
- **Adjacent security technologies.** The vendors provide products like web security, DLP solutions, endpoint security, and network security products that integrate with their email offering.
- **Scalability and availability.** The vendors deliver email security capabilities to a diverse set of end users and devices and at a scale from small business to large enterprise.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Trend Micro

Trend Micro is placed in the Leaders category in this IDC MarketScape for making its messaging product a prominent part of its security suite, which also includes its endpoint, web, encryption, mobile, and soon network security products. Trend Micro has been in the email space since 1997 and released its SaaS product in 2007. Trend Micro offers cloud, on-premise, virtual, and hybrid solutions for its messaging product that can work with Microsoft, Linux, and VMware environments as well as Microsoft Exchange, Office 365 suite, and IBM Domino. The company's email security product has grown predominantly through organic growth, but features like encryption and DLP were acquired and integrated into the product. Trend Micro is working with its strategic alliance partners to provide bundled products and complete security and technology environments alongside its suite strategy with its own products.

Trend Micro is also very good at listening to customers and adjusting its products based on the current trends according to its customers. In addition, Trend Micro is focusing on some of the newest features in email security including STAP and anti-spear phishing features. One customer said the email reputation services were the best part of the product and caught the majority of malicious emails coming through the environment. Trend Micro offers many accompanying products that provide a wide array of STAP features including sandboxing technologies. There is currently feature parity among the protection capabilities of the products, and in the next two years, the management and monitoring capabilities will gain complete parity. ScanMail provides ediscovery and archiving capabilities with some of these features being on other Trend Micro messaging products. Medium-sized to large enterprises, companies that already utilize Trend Micro, and customers particularly concerned about targeted attacks should consider Trend Micro for the email solution.

Trend Micro recently acquired Tipping Point, a network security company, from HPE. Trend Micro has never acquired a company this large, and it will be important to watch how it integrates this new technology into its product suite and if it is able to maintain focus on its traditional technologies while working this new product into its suite.

Strengths

- It's easy to set up and use the email product. One customer didn't go through any training and was able to set up all of the policies without help.
- Channel partnership, sales structure, and multiple bundling options with its own products and partners make it easy to purchase the product and any additional products and features exactly how, when, and where a customer requires them.
- Data loss prevention, encrypt messages, read encrypted messages, STAP features, sandboxing, URL filtering, document filtering, anti-spear phishing, reputation services, and mobile options can provide numerous configurations for customer needs.

Challenges

- Trend Micro has a central management system, but customers were unable to use it because there was no easy way to transport their old policies into the new system.
- Trend Micro's story for its messaging product is more security focused than risk and compliance focused, and not all of its products are certified for use by defense contractors.
- Trend Micro did not test poorly for false positive rates, but some customers said they had a noticeable rate of alerts that ended up not being a problem.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user

interviews, buyer surveys, and the input of a review board of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

The email security market is made up of email solutions that provide antispam, antimalware, content filtering, encryption, and data loss prevention (DLP) features for email. For the purposes of this study, IDC included vendors and products largely defined as secure email gateways, which integrate most of the features previously outlined into a single product offering.

Strategies and Capabilities Criteria

As part of this study, IDC examined the vendor offering strategy. This includes a review and comparison of product functionality and available delivery options. Also incorporated into the analysis were competitive licensing and pricing, support, and integration with a portfolio of products. The vendor offering strategy also included a review of the integration strategy and planned development to address customer requirements.

The study examined an offering's ability to monitor internal and external email and the processing speed of on-premise and appliance gateways. IDC also assessed the strength of each vendor's threat intelligence capabilities and how quickly protection can be delivered when new threats are identified.

IDC assessed the relative strength of each email security vendor's user community and its ability to engage with its customer base. It looked at presale and post-sale activities and the ability to keep up the technology and threat trends.

IDC also considered each vendor's go-to-market strategy. The review assessed the marketing strategy, sales and distribution strategy, and customer service effectiveness. The business strategy took into account each vendor's financial strength based on data provided by vendors and collected from publicly available sources.

LEARN MORE

Related Research

- *IDC MarketScape: Worldwide Web Security 2016 Vendor Assessment* (IDC #US41000015, February 2016)
- *Worldwide Messaging Security Market Shares, 2014: Concern Over Targeted Threats* (IDC #259606, October 2015)
- *Worldwide Messaging Security Forecast, 2015-2019: Protecting Against New Threats* (IDC #259159, September 2015)

Synopsis

This IDC study uses the vendor assessment model called IDC MarketScape, which pulls together a vendor's quantitative and qualitative characteristics to examine each vendor's market potential. The messaging security market is more mature, with most vendors providing standard functionality. This study examined email security integration and adjacent security technologies such as emerging

solutions designed to detect targeted attacks. Some security vendors are closely integrating their advanced threat defense portfolio with traditional gateways, network, and endpoint security products. Vendors fared strongly if they could demonstrate fully capable platforms that had complete feature parity and centralized reporting and management capabilities.

"Vendors in the email security market are continuing to transition to cloud and provide hybrid offerings to benefit their customers in their transition to the cloud as well," said Elizabeth Corr, research analyst for IDC's Security Products.

About IDC

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