Security Industry Market Share Analysis

September 2011

Introduction

OPSWAT releases quarterly market share reports for several sectors of the security industry. This quarter's report includes both worldwide and North American market share and usage data for antivirus software, Windows Operating Systems, as well as market share and usage data for hard disk encryption applications. The data used was collected between May 16, 2011 and August 15, 2011. Please note that OPSWAT is not a research institution; this report aims to distribute the unique data collected to inspire public discussion, not to make any claims as to why changes have occurred.

About OPSWAT

Founded in 2002, OPSWAT provides software engineers and IT professionals with development tools and data services to power manageability and security solutions. The company's primary product, OESIS Framework, is a manageability solution licensed by major technology companies like Cisco Systems, Juniper Networks, F5 Networks, Microsoft, HP and many others. Having been adopted as the industry standard software development toolkit (SDK) for creating compliance and manageability applications, the framework's application libraries have now been deployed on an estimated hundred million endpoint systems worldwide. To learn more about OESIS, please visit the product page at www.opswat.com/products/oesis-framework.

The Research

This report shows usage data for security applications on Windows systems. The data was collected using OPSWAT's AppRemover tool, which utilizes the detection capabilities of the OESIS Framework to collect information regarding the applications installed on endpoint computers. This tool is free for download on www.appremover.com and is used around the world by home and business users, both expert and inexperienced in security software. The sample is assumed to be representative of the market for this report, based on the wide accessibility of the tool to a large range of users.

If the user of the tool opts in, a report of the applications installed on the computer is created. These opt-in reports are compiled to generate the market share calculations in this report. More than 37,000 data points were compiled for this report.

In addition to applications detected by the OESIS Framework, other well known applications are also included in the hard disk encryption market share based on registry searches. OPSWAT acknowledges that not every security application is included in this report. Antivirus, hard disk encryption and other security application vendors interested in inclusion in these reports and the OESIS Framework are encouraged to contact certification@opswat.com to learn how to partner with OPSWAT.
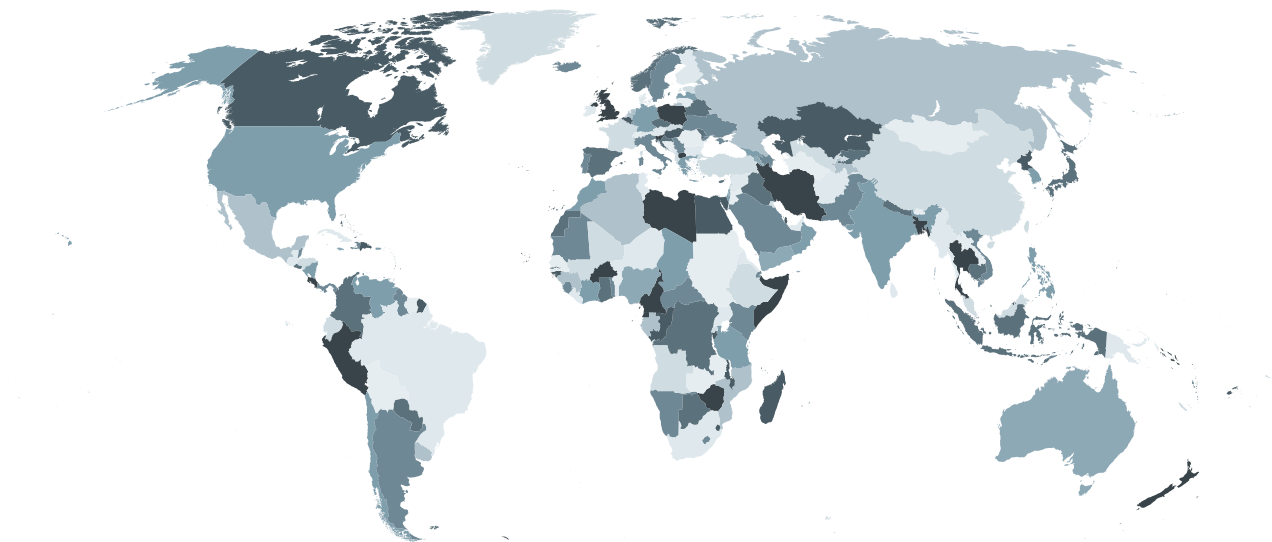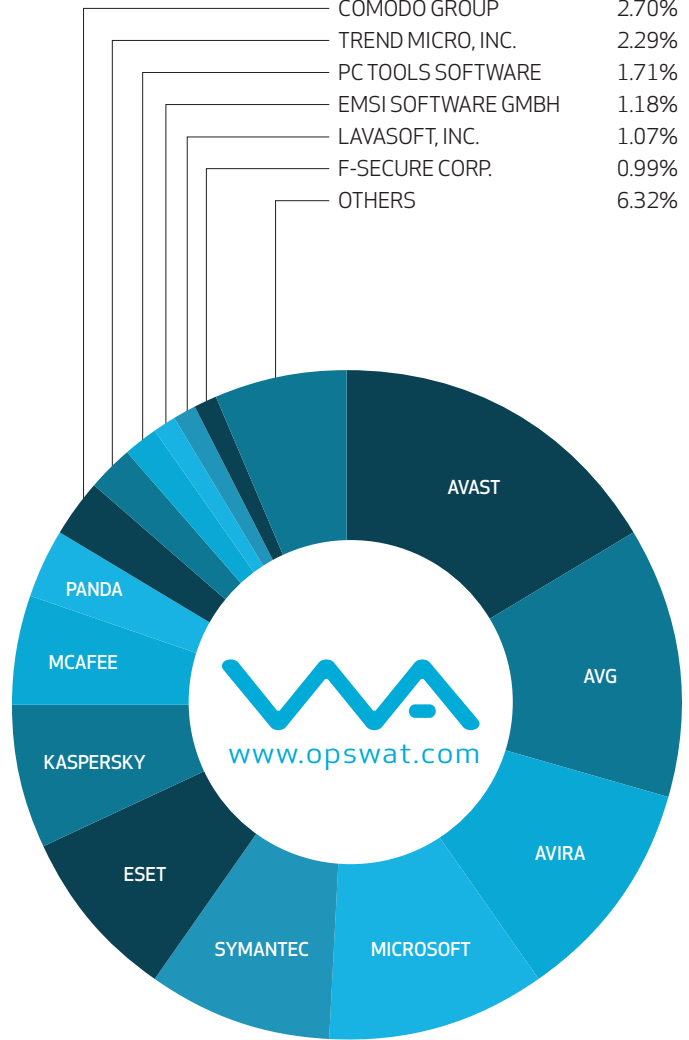
Worldwide Antivirus Vendor Market Share

AVAST Software has a strong lead in the worldwide antivirus market in this quarter's report with 16.61%, a recovery from the decrease shown in OPSWAT's June report. AVG, Avira, and Microsoft follow, each with over 10% of the market, and maintain their rankings from last quarter's report. Symantec has edged slightly higher than ESET in this report and holds the fifth position with 8.93% of the worldwide market. Most of the other vendors maintain their rankings from last quarter, with the exception of Lavasoft, Inc., who rose into the top 15.

The percentage of the market held by the top 15 vendors remained almost constant with the data from June's report, at around 93%.

WORLDWIDE SEPTEMBER 2011

Vendor	Share
AVAST SOFTWARE	16.61%
AVG TECHNOLOGIES	12.94%
AVIRA GMBH	10.81%
MICROSOFT CORP.	10.58%
SYMANTEC CORP.	8.93%
ESET SOFTWARE	8.43%
KASPERSKY LABS	6.94%
MCAFEE, INC.	5.13%
PANDA SECURITY	3.37%
COMODO GROUP	2.70%
TREND MICRO, INC.	2.29%
PC TOOLS SOFTWARE	1.71%
EMSI SOFTWARE GMBH	1.18%
LAVASOFT, INC.	1.07%
F-SECURE CORP.	0.99%
OTHERS	6.32%

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JUNE 2011 VS. SEPTEMBER 2011
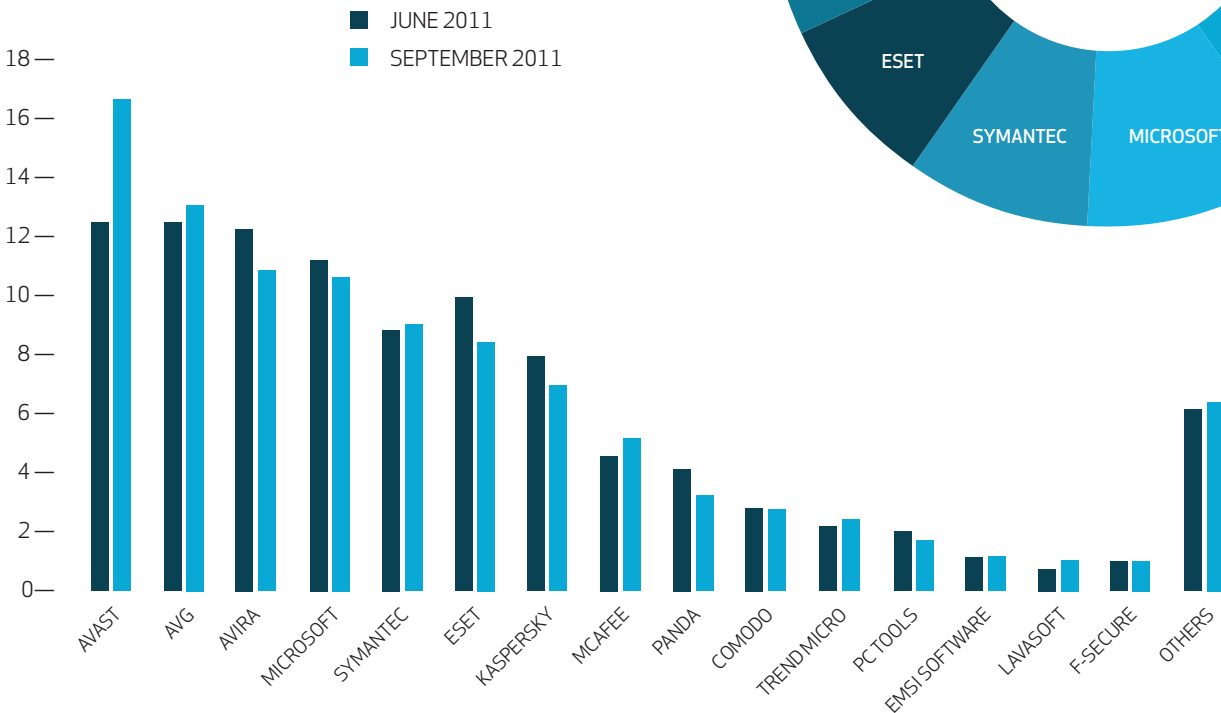
North America Antivirus Vendor Market Share

Microsoft remained at the top of the market this quarter, despite a slight decrease to 16.33%. Symantec moved into the second position with a small increase in share compared with OPSWAT's last report, and AVG fell into the third position with 14.32% of the North American market. AVAST rose to 13.28% to follow just behind AVG. AVAST had held about 13% of the market in OPSWAT's report a year ago, but had been declining over the last few reports. The increase in this report moves AVAST back to their previous level.

The top four vendors in this report control just under 60% of the market, and individually hold considerably higher shares of the market than the fifth largest vendor (McAfee with 7.01%).

NORTH AMERICA SEPTEMBER 2011

MICROSOFT CORP.	16.33%
SYMANTEC CORP.	15.28%
AVG TECHNOLOGIES	14.32%
AVAST SOFTWARE	13.28%
MCAFEE, INC.	7.01%
ESET SOFTWARE	5.66%
AVIRA GMBH	4.47%
TREND MICRO, INC.	3.28%
PANDA SECURITY	3.11%
KASPERSKY LABS	2.98%
PC TOOLS SOFTWARE	2.57%
COMODO GROUP	1.74%
LAVASOFT, INC.	1.31%
EMSI SOFTWARE GMBH	0.98%
WEBROOT SOFTWARE	0.87%
OTHERS	6.81%

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JUNE 2011 VS. SEPTEMBER 2011
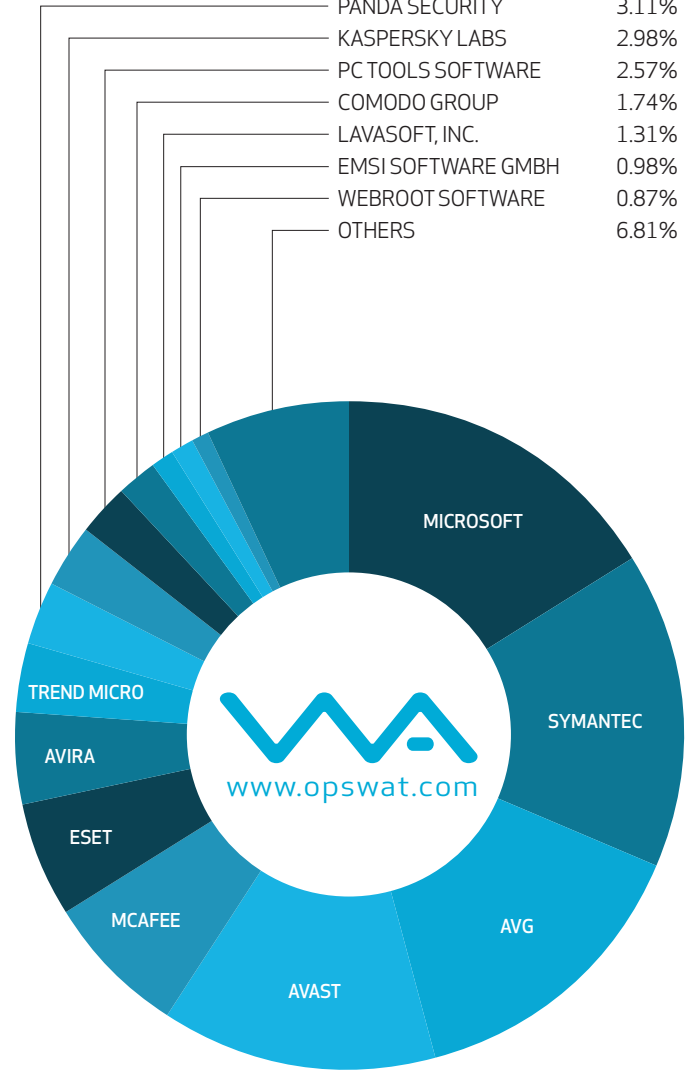
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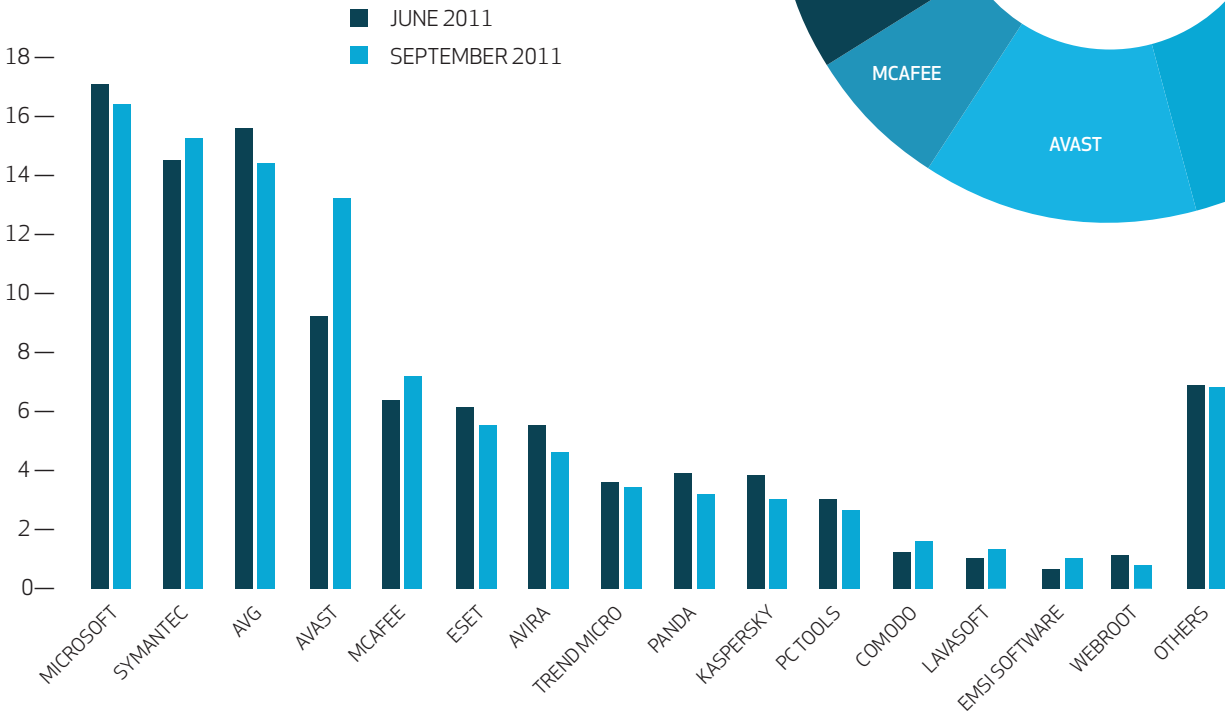
Antivirus Product Market Share

The top ten individual antivirus products in North America have continued to increase their combined share of the market. A-J below together control 61.80% of the North American AV market. Worldwide, the top ten products hold 63.14% of the market (shown on the next page). Microsoft's Security Essentials remains at the top of the North American market, with little change from our last report.

NORTH AMERICA
SEPTEMBER 2011

A	MICROSOFT SECURITY ESSENTIALS	15.62%
B	AVAST ! FREE ANTIVIRUS	9.87%
C	AVG ANTIVIRUS FREE	8.98%
D	NORTON ANTIVIRUS	6.14%
E	MCAFEE VIRUSSCAN	4.88%
F	AVG 10 [ANTIVIRUS]	4.33%
G	ESET NOD32 ANTIVIRUS	3.32%
H	AVIRA ANTIVIR PERSONAL - FREE ANTIVIRUS	3.07%
I	SYMANTEC ENDPOINT PROTECTION	2.89%
J	NORTON 360	2.70%
K	MCAFEE VIRUSSCAN ENTERPRISE	2.06%
L	ESET SMART SECURITY	1.88%
M	AVAST! INTERNET SECURITY	1.69%
N	COMODO ANTIVIRUS	1.69%
O	KASPERSKY INTERNET SECURITY	1.53%
P	OTHERS	29.35%

Conclusions

In North America, fifty-two different antivirus vendors and 141 antivirus products were detected in this report. The top five vendors in North America combined to control 66.22% of the market, about 2% more than in OPSWAT's June report. The top five vendors in the worldwide market increased their share as well, but only slightly, to 59.87%. Sixty-four vendors and 226 products were detected worldwide.

As in our previous reports, free solutions remain at the top of the market with the highest numbers of installations. The top three products in North America and the top four products worldwide are available free for download.

Looking at the top ten products in North America, only Symantec and AVG have more than one product ranking, which helps them to become the 2nd and 3rd leading vendors in North America. Microsoft is able to dominate the market as a vendor due to the large number of installations of just one product, Microsoft Security Essentials. In the worldwide market, only AVG has more than one product ranking in the top ten. AVAST and Avira have individual products that top the chart with more than 10% share, resulting in their positions at the top of the worldwide antivirus market along with AVG.
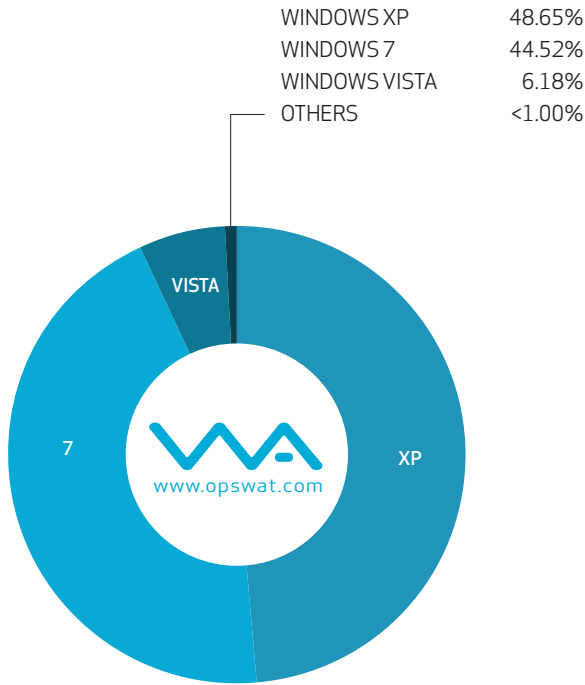

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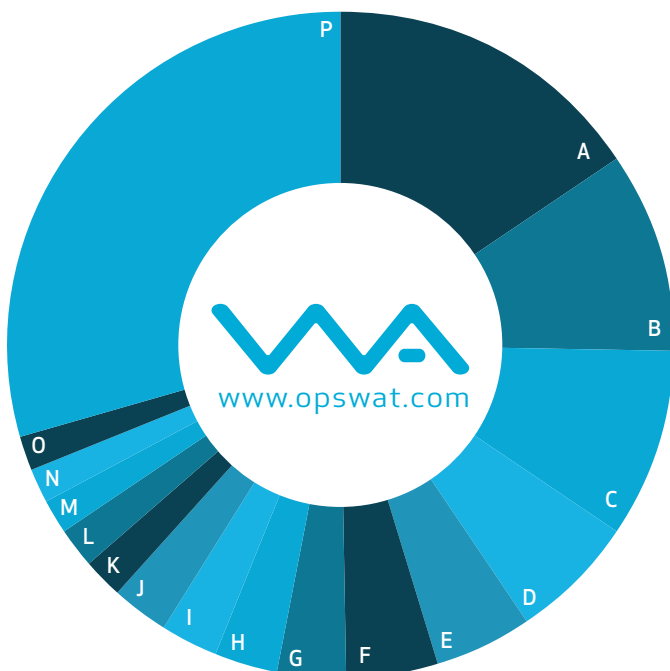
Antivirus Product Market Share

WORLDWIDE
SEPTEMBER 2011

A	AVAST! FREE ANTIVIRUS	11.99%
B	MICROSOFT SECURITY ESSENTIALS	10.27%
C	AVIRA ANTIVIR PERSONAL - FREE ANTIVIRUS	9.05%
D	AVG ANTIVIRUS FREE	7.89%
E	ESET NOD32 ANTIVIRUS	5.30%
F	AVG 10 [ANTIVIRUS]	4.40%
G	NORTON ANTIVIRUS	4.34%
H	KASPERSKY INTERNET SECURITY	4.05%
I	MCAFEE VIRUSSCAN	3.20%
J	COMODO ANTIVIRUS	2.65%
K	AVAST! INTERNET SECURITY	2.57%
L	ESET SMART SECURITY	2.47%
M	MCAFEE VIRUSSCAN ENTERPRISE	1.88%
N	PANDA CLOUD ANTIVIRUS	1.61%
O	KASPERSKY ANTIVIRUS	1.55%
P	SYMANTEC ENDPOINT PROTECTION	1.36%
Q	NORTON 360	1.19%
R	EMSISOFT ANTI-MALWARE	1.04%
S	AD-AWARE PRO INTERNET SECURITY	1.03%
T	360 ANTIVIRUS	0.91%
U	SYMANTEC ANTIVIRUS	0.82%
V	OTHERS	20.43%

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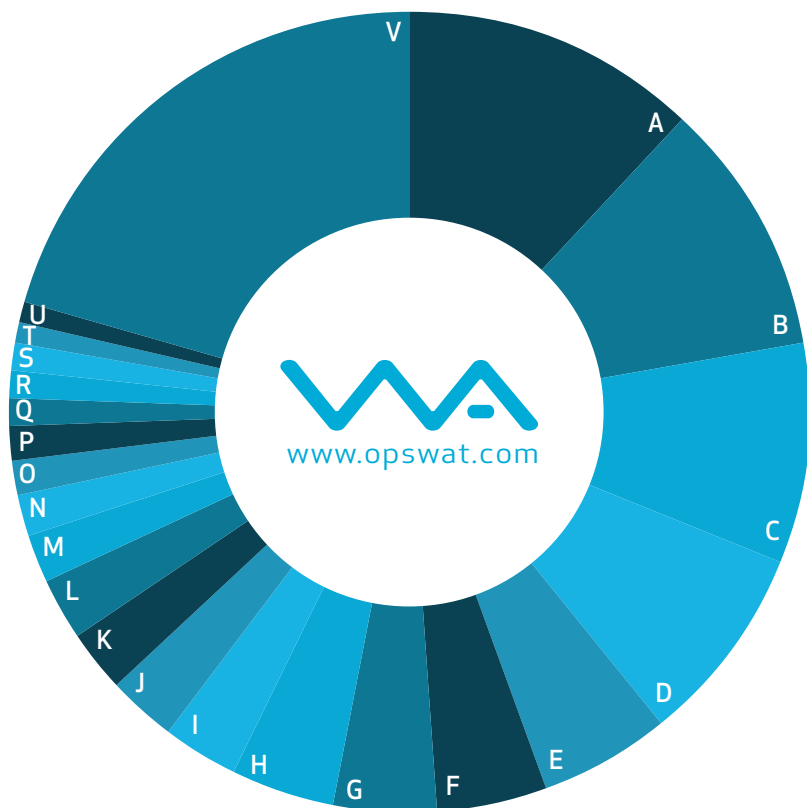
Windows Operating System Deployments

NORTH AMERICA
SEPTEMBER 2011

WINDOWS XP	48.65%
WINDOWS 7	44.52%
WINDOWS VISTA	6.18%
OTHERS	<1.00%

WORLDWIDE
SEPTEMBER 2011

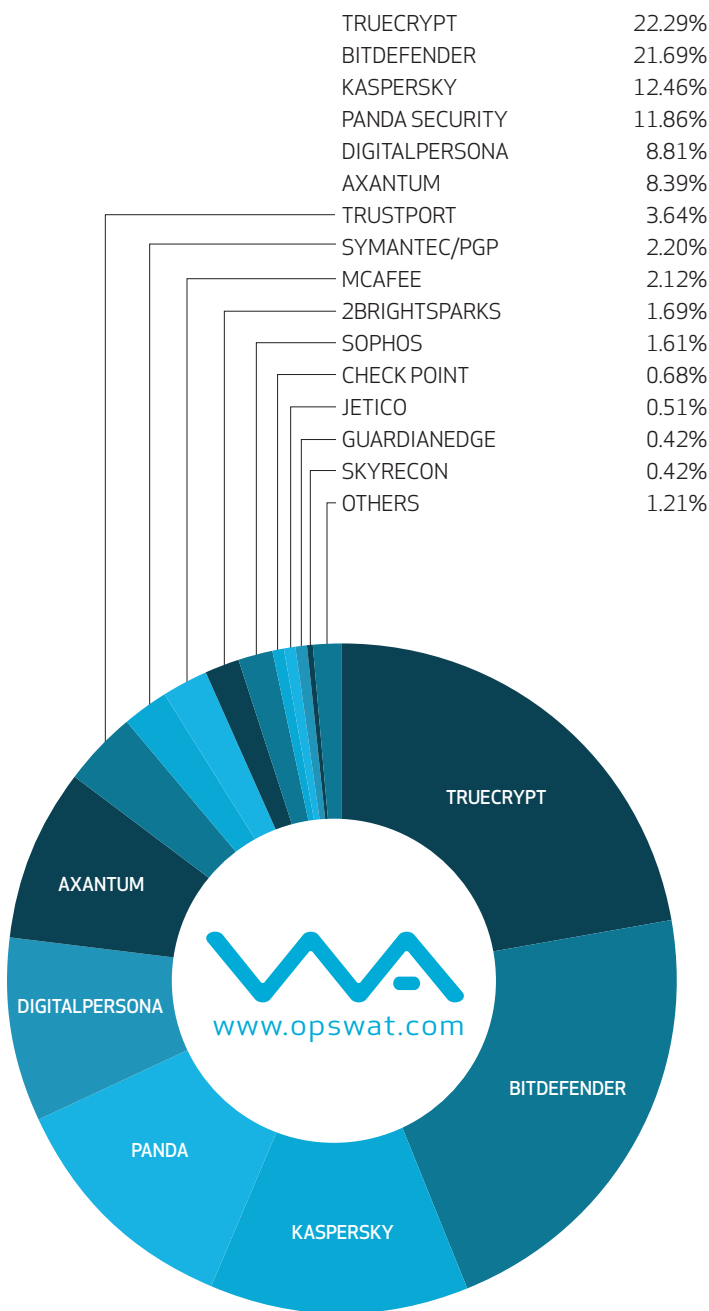|	
WINDOWS XP	53.68%
WINDOWS 7	41.53%
WINDOWS VISTA	4.18%
OTHERS	<1.00%
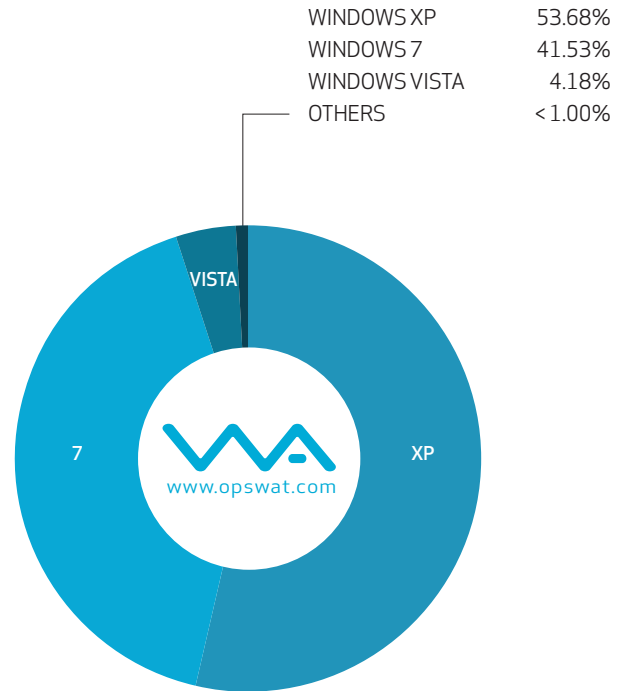
The Windows OS usage trends from OPSWAT's reports over the last year continue in this report. Windows 7 usage is gaining in both North America and worldwide, while Windows Vista usage declines. Windows XP has declined slightly, but still remains the dominant operating system. Other operating systems represent less than one percent of the data for both regions.
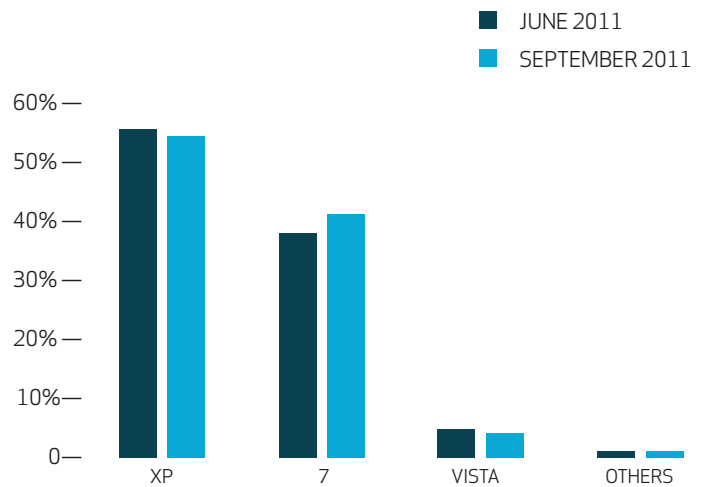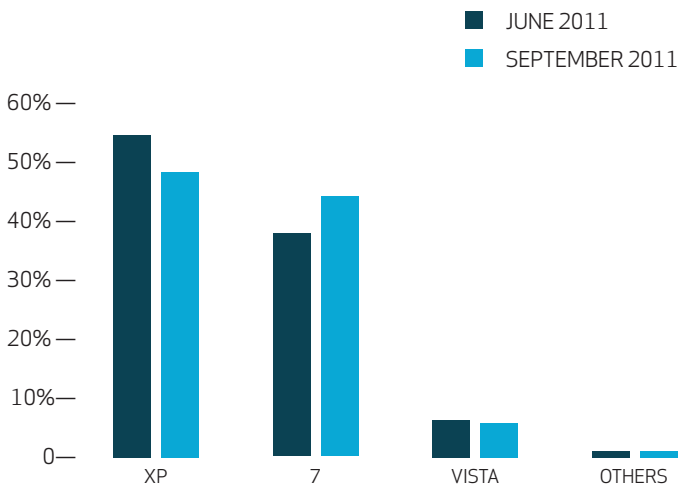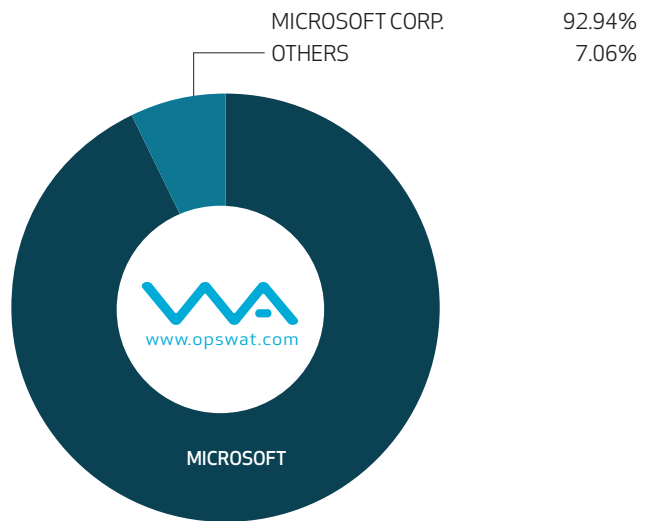
Hard Disk Encryption Market Share

OPSWAT used both the detection capabilities of the OESIS Framework as well as registry information to determine the market share of well-known hard disk encryption applications. As shown to the right, Microsoft dominates the market of installed encryption applications, which is unsurprising due to BitLocker being included with many Windows systems. When looking at only the non-Microsoft installations, the market share is as shown in the graph below, with TrueCrypt and BitDefender leading.

TRUECRYPT	22.29%
BITDEFENDER	21.69%
KASPERSKY	12.46%
PANDA SECURITY	11.86%
DIGITALPERSONA	8.81%
AXANTUM	8.39%
TRUSTPORT	3.64%
SYMANTEC/PGP	2.20%
MCAFEE	2.12%
2BRIGHTSPARKS	1.69%
SOPHOS	1.61%
CHECK POINT	0.68%
JETICO	0.51%
GUARDIANEDGE	0.42%
SKYRECON	0.42%
OTHERS	1.21%

DISK ENCRYPTION MARKET SHARE WORLDWIDE SEPTEMBER 2011

MICROSOFT CORP.	92.94%
OTHERS	7.06%

DISK ENCRYPTION USAGE WORLDWIDE SEPTEMBER 2011

In addition to detecting whether an application is installed, the OESIS Framework can also report on various functions of supported applications. For several hard disk encryption products, it is possible to detect whether the application is enabled, or actively encrypting. Of the computers worldwide with BitLocker installed, OPSWAT data shows that less than 1% were actively being encrypted, down about 1% from our hard disk encryption report last September.

We also looked at the percent of TrueCrypt users that were actively encrypting and found that this number was significantly higher than for BitLocker, at 13.09%. Although Symantec's PGP Desktop had a much smaller presence than these two programs, it is interesting to note that 10% of its installations were actively encrypted. Compared with these two standalone encryption products, Kaspersky PURE (a security suite with an encryption tool included), had very low encryption usage, at only 0.86%, showing that single function products were much more likely to be used for encryption.

December Backup Client Report Details

Don't miss our next quarterly market share report, coming in December! The next report will cover antivirus market share, Windows OS usage and backup client market share.

Visit www.opswat.com/about/media/reports to see all of OPSWAT's reports, including last December's report, which also covered backup market share.

Also Coming Soon...

OPSWAT will be releasing a brand new antivirus and threat report utilizing data from Metascan Online, OPSWAT's fast, free online file scanner using multiple antivirus engines. The report will include scanning speed statistics for the many engines included in Metascan Online as well as information about the threats detected.

Visit www.metascan-online.com to try OPSWAT's free online virus scanner. For more information or with questions about the engines included in Metascan Online, please contact marketing@opswat.com.

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About OPSWAT

Founded in 2002, OPSWAT is the industry leader in software management SDKs, interoperability certification and multiple-engine scanning solutions. With both software manageability and multi-scanning products, OPSWAT offers simplified and comprehensive SDKs that reduce time and costs for your engineering and testing teams.

OPSWAT Certification

The OPSWAT Certification Program is a free interoperability program designed to enable technology partnerships between independent software vendors and leading network and technology solution vendors, by verifying that their security applications will work seamlessly with solutions employing the OESIS Framework. Additional information is available at www.opswat.com/certified.

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Products

OESIS

OESIS Framework is a cross platform, open development framework that enables software engineers and technology vendors to develop products that detect, classify and manage thousands of third-party software applications. OESIS is perfect for SSL VPN, network access control (NAC) and other manageability solutions, and is deployed on an estimated 100 million endpoints worldwide.

AppRemover

The free AppRemover utility enables the thorough uninstallation of security applications like antivirus and antispyware from your computer. AppRemover is available for commercial licensing if you wish to deploy multiple copies of AppRemover within an organization or entity, or if you wish to bundle AppRemover with hardware, software or other services. More information is available at www.appremover.com.

Metascan

Metascan enables IT professionals and software engineers to enhance network security by integrating multi-scanning technology into their proprietary solutions. Metascan includes licenses for multiple built-in antivirus engines from market leaders such as CA, ESET, AVG and others, and allows for integration with other engines of your choice as well. Using multiple engines significantly improves the likelihood of detecting malware, as your solution will be secure if any of the included engines detects the threat. A free, online demo of Metascan is available at www.metascan-online.com.

MD4SA

Powered by five anti-malware engines, MetaDefender for Secure Access (MD4SA) enables fast multi-scanning of endpoints for key loggers, viruses and other malware. Available as either a cloud service or hosted software package, MD4SA is ideal for quickly scanning endpoints' running processes and memory prior to a network, web or server login. A demo built using MD4SA technology is available at www.opswat.com/products/metadefender-for-secure-access.

MD4M

MetaDefender for Media (MD4M) is the ideal solution to protect your organization from risks associated with infected media present on peripheral devices such as USB drives and CDs/DVDs. MD4M scans your media using up to nine licensed antivirus engines simultaneously, enhancing content security with multi-scanning technology.

Secure Virtual Desktop

Browse securely and privately from any computer using Secure Virtual Desktop (SVD). By creating an isolated environment, SVD ensures that no trace of file creation, file modification, or other activities remain on the computer when you leave the private session. SVD is an ideal solution for protecting data accessed from public computers or guest laptops.