Security Industry Market Share Analysis

March 2012

Introduction

OPSWAT releases quarterly market share reports for several sectors of the security industry. This report includes both worldwide and North American market share for antivirus software and Windows operating systems, as well as worldwide market share for peer-to-peer applications. The data used was collected between March 23, 2011 and February 15, 2012, and comparisons are made to data from March 23, 2010 through February 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 flagship product, OESIS Framework, is a manageability solution licensed by major technology companies like Cisco Systems, Juniper Networks, Citrix, Microsoft, HP and many others. As the industry standard for enabling endpoint application manageability and compliance regulation, OESIS has already 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 various download sites around the web, 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 353,000 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 P2P market share based on registry searches. OPSWAT acknowledges that not every security application is included in this report. Antivirus, P2P 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.
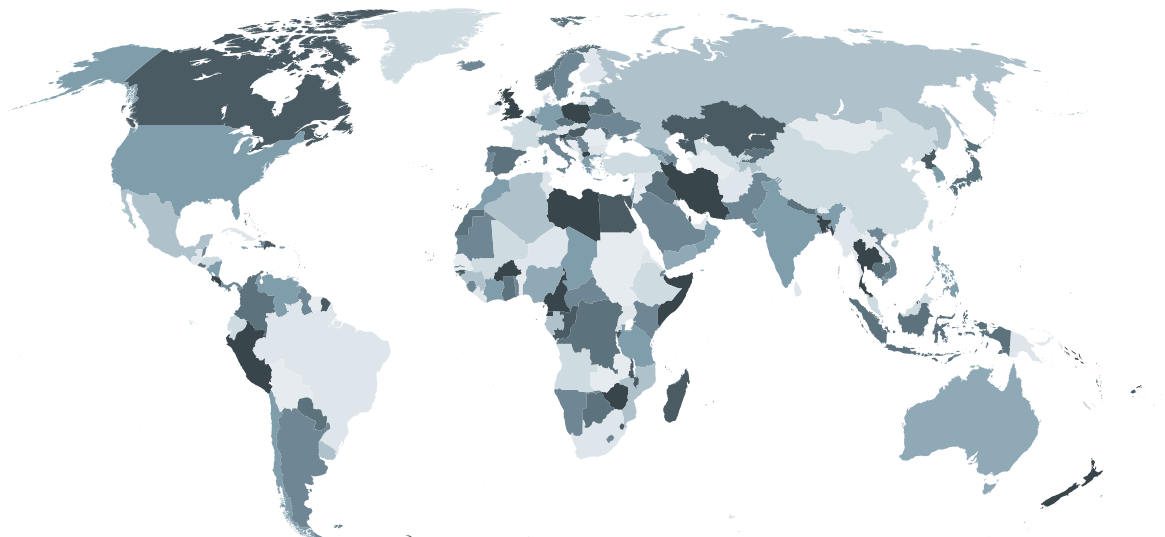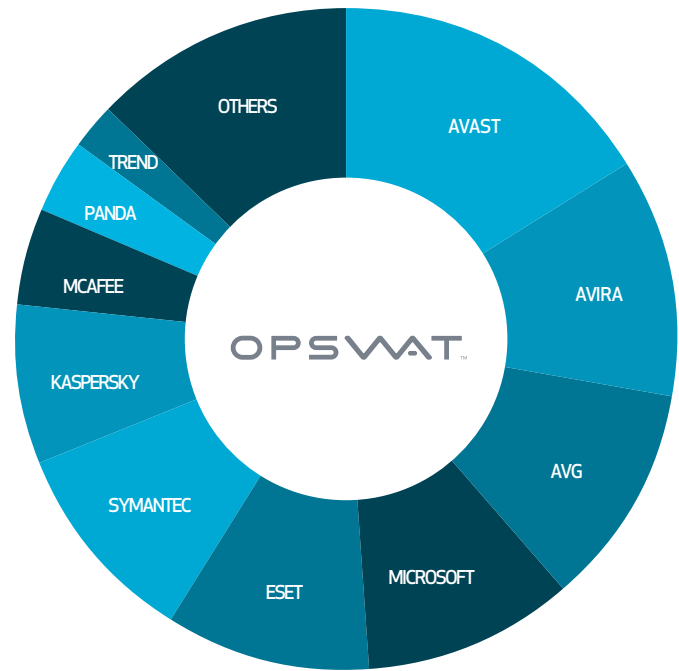
Worldwide Antivirus Vendor Market Share

Avast! Software has had a strong lead in the worldwide antivirus market for the past few years, with 16.26% in the last year and 17.27% the previous year. Avira, AVG, Microsoft, and ESET follow in this year's rankings, each with over 10% of the market. Microsoft has made the biggest gains in the past year, increasing its share from 7.27% a year ago to 10.08% today. Symantec holds the fifth position with 9.97% of the worldwide market. While some shifting has occurred between 2011 and 2012, the vendors that appear in the top 10 remain the same, with the exception of Trend Micro, who rose to push PC Tools from the 10th position.

The percentage of the market held by the top 10 vendors was 87.46%, a slight increase from 86.57% in 2010.

WORLDWIDE MARCH 2012

Vendor	Share
AVAST SOFTWARE	16.26%
AVIRA GMBH	11.65%
AVG TECHNOLOGIES	10.96%
MICROSOFT CORP.	10.08%
ESET SOFTWARE	10.06%
SYMANTEC CORP.	9.97%
KASPERSKY LABS	7.75%
MCAFEE, INC	4.74%
PANDA SOFTWARE	3.77%
TREND MICRO, INC.	2.22%
OTHERS	12.54%

2011 VS. 2012

MARCH 2010 - FEBRUARY 2011
MARCH 2011 - FEBRUARY 2012
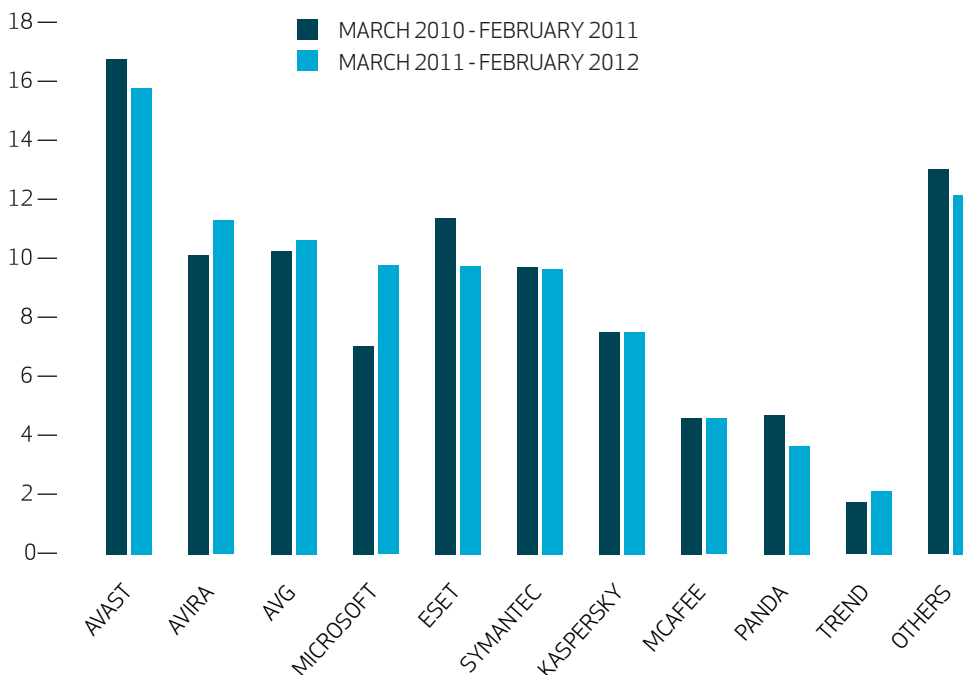
North America Antivirus Vendor Market Share

Symantec continues to lead the North American antivirus market at the beginning of 2012 with 16.09%, a slight decrease from their 16.65% in 2011. Microsoft leaped from fourth to second place in this year's ranking with an increase from 9.94 to 14.92% over the last year. This increase by Microsoft pushed AVG into third place despite an increase in market share for AVG as well. Avast! dropped from 12.59% to 11.96% and lowered its rank from third to fourth. Trend Micro knocked PC Tools off the top ten, while Avira and Kaspersky made gains from last year.

The top four vendors in this report control 56.19% of the market, and individually hold considerably higher shares of the market than the fifth largest vendor (ESET with 7.06%).

NORTH AMERICA MARCH 2012

SYMANTEC CORP.	16.09%
MICROSOFT CORP.	14.92%
AVG TECHNOLOGIES	13.22%
AVAST	11.96%
ESET SOFTWARE	7.06%
MCAFEE, INC.	6.76%
AVIRA GMBH	4.41%
KASPERSKY LABS	4.03%
PANDA SOFTWARE	3.49%
TREND MICRO, INC.	3.10%
OTHERS	14.96%

## 2011 VS. 2012
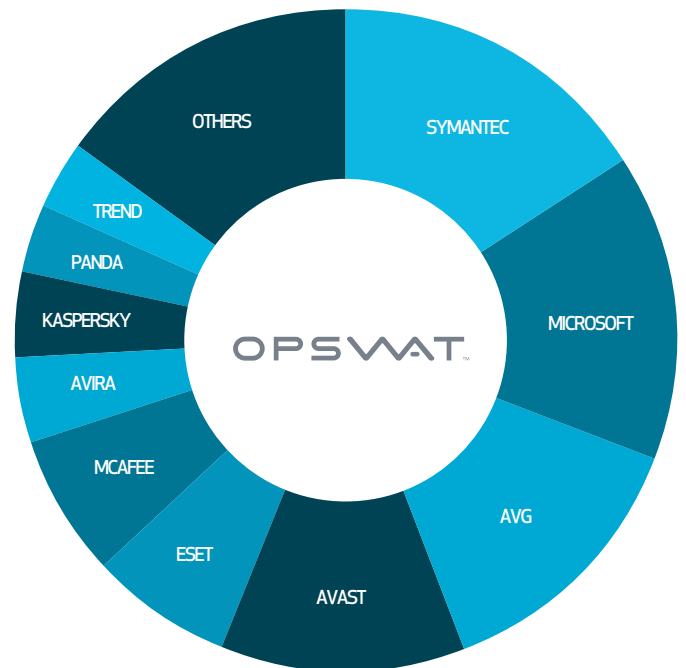
MARCH 2010 - FEBRUARY 2011
MARCH 2011 - FEBRUARY 2012
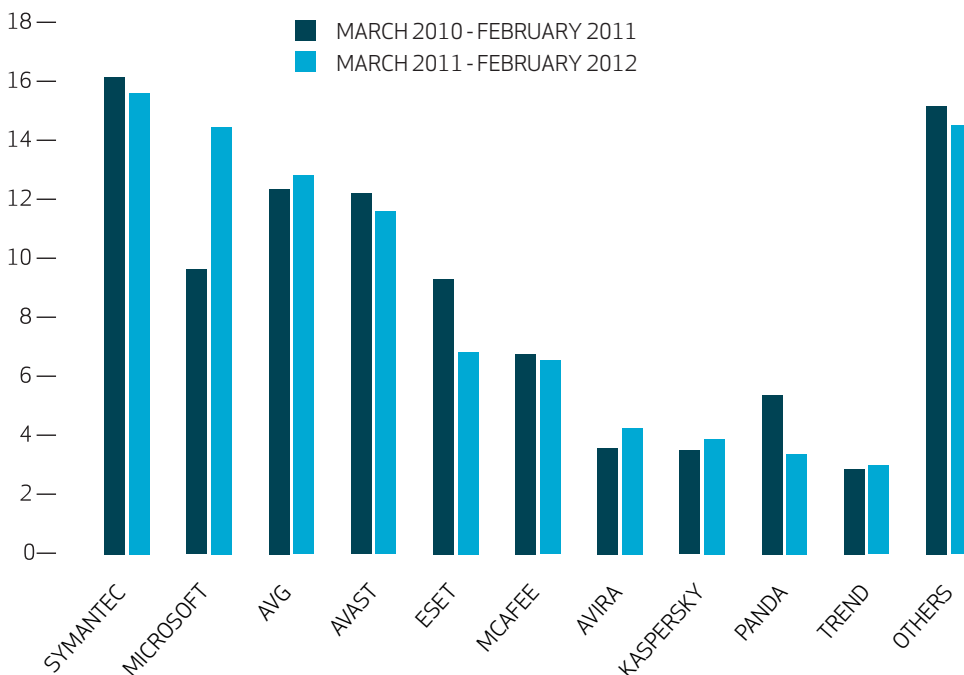
Antivirus Product Market Share

The top ten individual antivirus products worldwide, (A-J in the graph to the right) together control 64.94% of the worldwide AV market. In North America, the top ten products hold 63.08% of the market (A-J in the graph below). Microsoft Security Essentials has a strong lead in the North American market, while avast! Free Antivirus leads worldwide, ahead of Microsoft Security Essentials by about 2 percentage points.
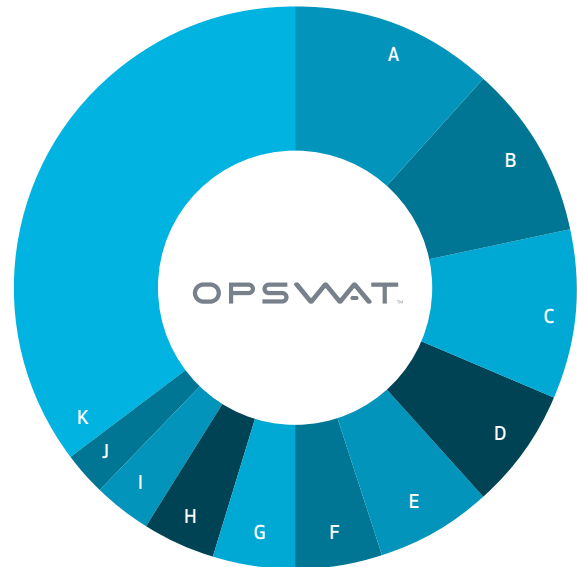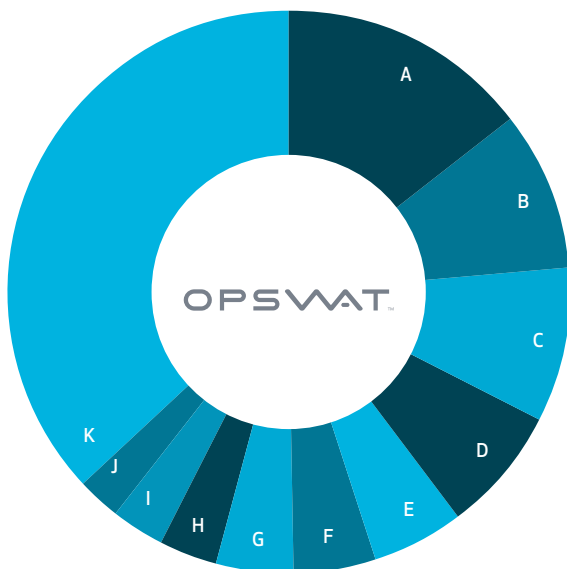

NORTH AMERICA
MARCH 2012

A	MICROSOFT SECURITY ESSENTIALS	14.58%
B	AVAST! FREE ANTIVIRUS	9.15%
C	AVG ANTI-VIRUS FREE EDITION	8.83%
D	NORTON ANTIVIRUS (SYMANTEC CORP.)	7.20%
E	ESET NOD32 ANTIVIRUS	5.29%
F	MCAFEE VIRUSSCAN	4.80%
G	AVG ANTIVIRUS	4.43%
H	AVIRA ANTIVIR PERSONAL - FREE ANTIVIRUS	3.44%
I	NORTON 360 (SYMANTEC CORP.)	2.96%
J	SYMANTEC ENDPOINT PROTECTION	2.40%
K	OTHERS	36.92%

WORLDWIDE
MARCH 2012

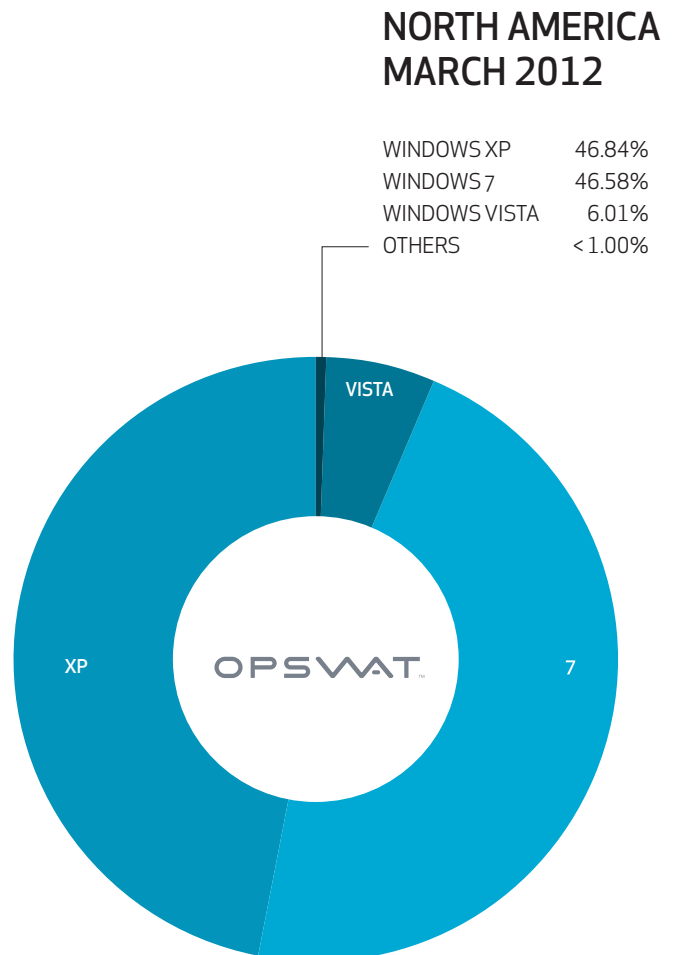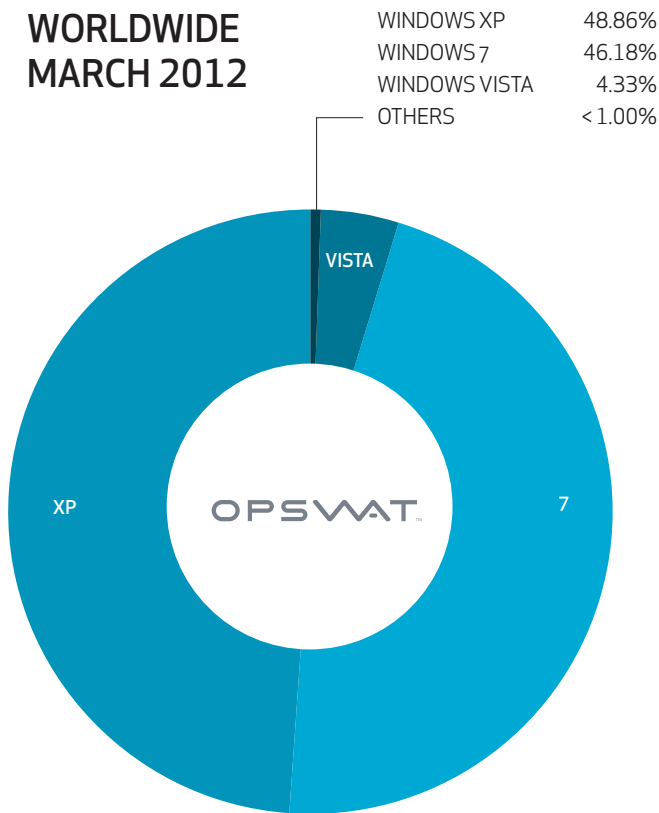|		
A	AVAST! FREE ANTIVIRUS	11.91%
B	MICROSOFT SECURITY ESSENTIALS	9.96%
C	AVIRA ANTIVIR PERSONAL - FREE ANTIVIRUS	9.75%
D	AVG ANTIVIRUS FREE EDITION	6.83%
E	ESET NOD32 ANTIVIRUS	6.75%
F	NORTON ANTIVIRUS	5.00%
G	KASPERSKY INTERNET SECURITY	4.62%
H	AVG ANTIVIRUS	4.19%
I	MCAFEE VIRUSSCAN	3.34%
J	ESET SMART SECURITY	2.59%
K	OTHERS	35.06%

Conclusions

In North America, 81 different antivirus vendors and 257 antivirus products were detected in this report. A total of 87 vendors and 367 products were detected worldwide. A large percentage of the market is controlled by a small group of vendors, with the top five controlling 59.01% of the worldwide market.

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 worldwide are available free for download.

Windows Operating System Deployments

OPSWAT's data for this report show that Windows XP remains the most popular Windows operating system in both North America and worldwide, with slightly under half of computers using XP. Windows 7 usage is strong in both North America and worldwide, approaching the popularity of XP, while Windows Vista is much less common. Other operating systems represent less than one percent of the data for both regions. Generally, differences between worldwide and North American Windows users were small, with worldwide users tending to use XP slightly more and Vista slightly less than North American users did.

WORLDWIDE MARCH 2012

WINDOWS XP	48.86%
WINDOWS 7	46.18%
WINDOWS VISTA	4.33%
OTHERS	< 1.00%

NORTH AMERICA MARCH 2012

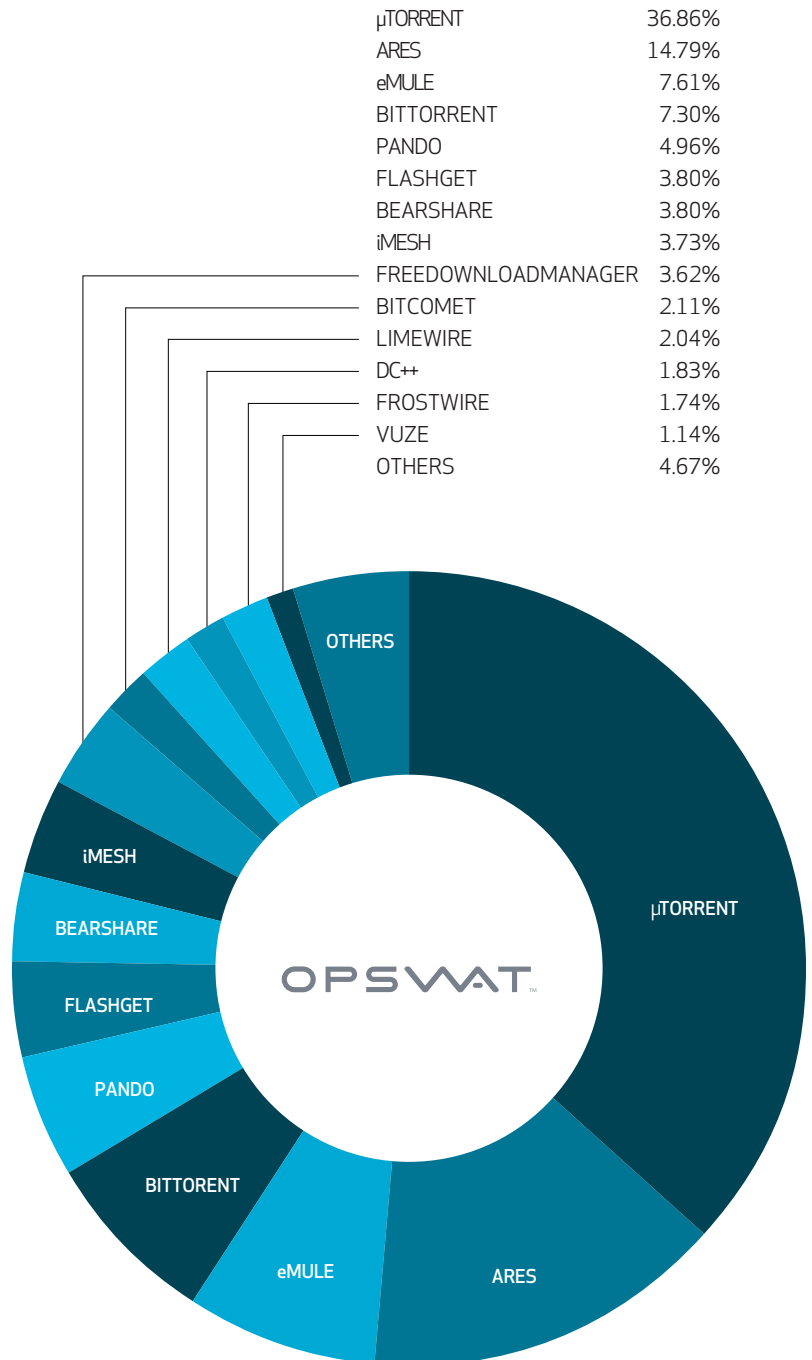|	
WINDOWS XP	46.84%
WINDOWS 7	46.58%
WINDOWS VISTA	6.01%
OTHERS	< 1.00%

Peer to Peer Application Market Share

A total 86,237 installations of peer-to-peer (P2P) applications were detected. For the purpose of this report, we define a P2P application as a product with public file sharing as its primary function. Based on this definition, we have excluded Skype, Opera, and ReelTime from the chart below.

While some consider Skype a P2P application, file sharing is only possible between contacts, rather than publicly, between peers. Opera has P2P capabilities, but it would be impossible to determine from our reports whether it was being used for P2P functions, or just as a browser. If added to the data, Skype would have 23.70% of the market and Opera would have 34.60%. Including Skype, Opera, and other eliminated applications would reduce the share of µTorrent users to 22.86%.

Conclusions

Much more dominant than the top two antivirus vendors, the top two P2P applications control more than half of the market, with a combined 51.65%. The top 10 control 88.58% of the market.

P2P APPLICATION MARKET SHARE MARCH 2012

µTORRENT	36.86%
ARES	14.79%
eMULE	7.61%
BITTORRENT	7.30%
PANDO	4.96%
FLASHGET	3.80%
BEARSHARE	3.80%
iMESH	3.73%
FREEDOWNLOADMANAGER	3.62%
BITCOMET	2.11%
LIMEWIRE	2.04%
DC++	1.83%
FROSTWIRE	1.74%
VUZE	1.14%
OTHERS	4.67%

June Instant Messenger Report Details

Don't miss our next quarterly market share report, coming in June! The next report will cover antivirus market share, Windows OS usage and instant messenger (IM) application market share.

Visit www.opswat.com/about/media/reports to see all of OPSWAT's reports, including last June's report, which also covered instant messenger applications.

New from OPSWAT

Secure Virtual Desktop

Check out the newly released demo of OPSWAT's Secure Virtual Desktop technology! Secure Virtual Desktop allows users to browse privately and anonymously from any computer, and protects sensitive data by ensuring that no traces of your activities are left on the machine when you exit the secure session. Learn more about how Secure Virtual Desktop can help prevent data leaks, and try the free, five-minute demo at www.securevirtualdesktop.com!

GEARS

OPSWAT recently launched a demo of GEARS, a white-labeled, cloud-based solution for monitoring and managing computers, servers, and switches. GEARS quickly exposes unpatched computers that may put an organization at risk by monitoring whether machines have the latest OS security patches and latest antivirus, firewall, and antispyware software updates. See how GEARS enables simple network management through the demo at www.opswatgears.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.

| OPSWAT GOLD CERTIFIED Product Type | OPSWAT SILVER CERTIFIED Product Type | OPSWAT BRONZE CERTIFIED Product Type |

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 already 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.

Multi-scanning

OPSWAT offers several multi-scanning solutions to enable fast, powerful content scanning. Because no single antivirus engine is perfect, using multiple engines significantly improves the likelihood of detecting malware.

Metascan technology powers each of OPSWAT's multi-scanning solutions, enabling IT professionals and software engineers to enhance network security by scanning with up to 30 built-in antivirus engines from market leaders such as ESET, Norman, AVG and many others. Metascan allows for custom implementations, such as integration with other engines of your choice, and can be used for rapid malware analysis and to implement sophisticated data loss prevention systems.

For specific multi-scanning needs, OPSWAT also offers MetaDefender for Secure Access (MD4SA), which quickly scans endpoints' running processes and memory for key loggers, viruses and other malware, and MetaDefender for Media (MD4M), which scans removable media such as USB drives, CDs, DVDs, and memory cards.

A free demo of Metascan technology is available at www.metascan-online.com.

GEARS

OPSWAT GEARS provides cloud-based endpoint management and monitoring to help IT managers prevent security compromises caused by missing patches and out-of-date or ineffective security software (such as antivirus, antispyware and desktop firewalls). GEARS is available as a white label solution ideal for wireless access point and storage vendors, and a free demo is available at www.opswatgears.com.

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. To learn more, visit www.securevirtualdesktop.com.