

Security Industry Market Share Analysis

December 2011

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 backup applications. The data used was collected between November 16, 2010 and November 15, 2011*, and comparisons are made to data from November 16, 2009 through November 15, 2010. 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

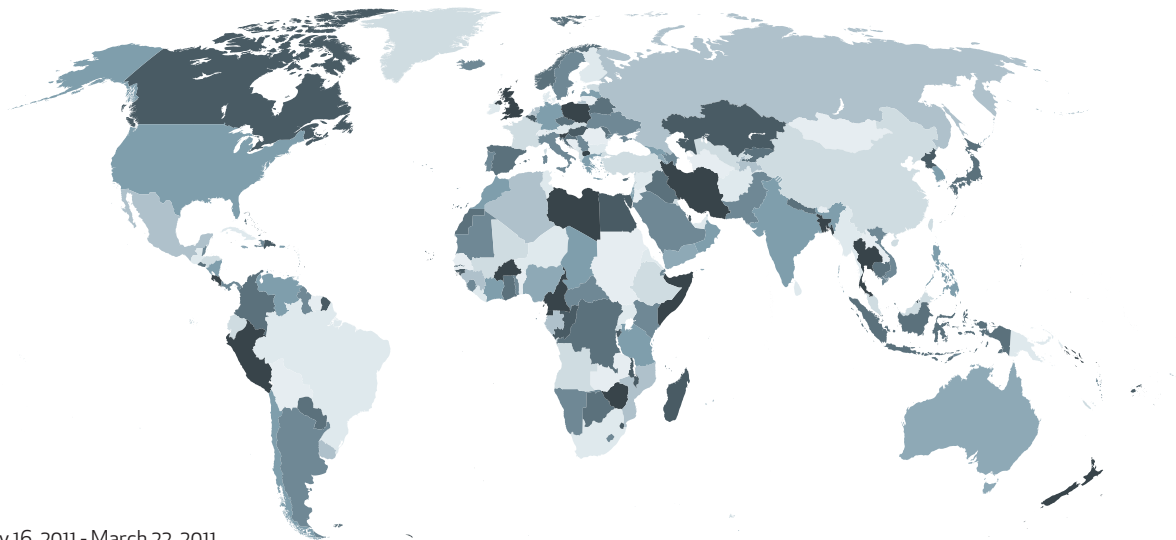
Founded in 2002, OPSWAT provides software engineers and IT professionals with development tools and data services to power manageability and security solutions. The company's flagship product, OESIS Framework, is a manageability solution licensed by major technology companies like Cisco Systems, Juniper 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 192,000 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, backup 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.



*Excluding February 16, 2011 - March 22, 2011

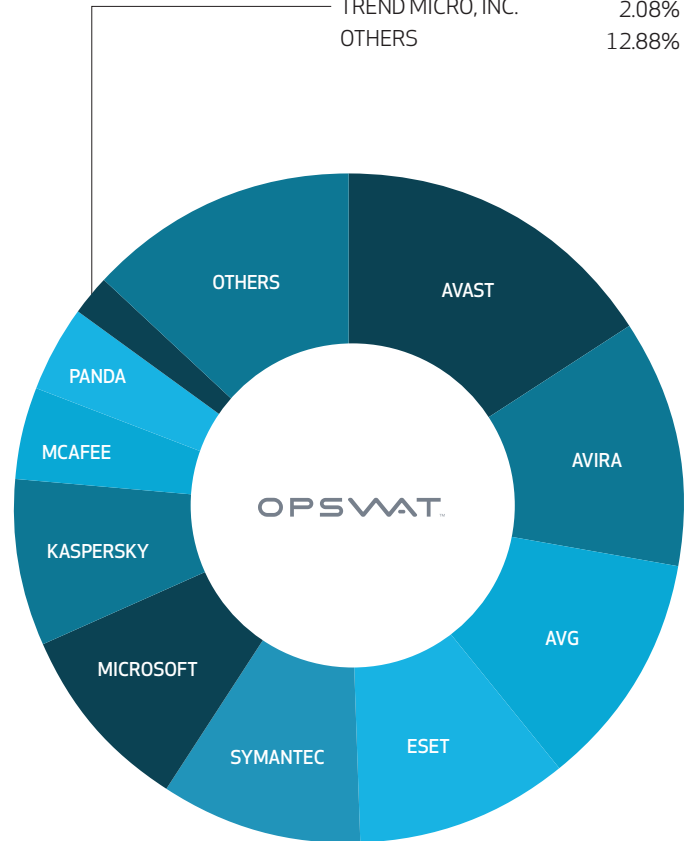
Worldwide Antivirus Vendor Market Share

AVAST Software has had a strong lead in the worldwide antivirus market for the past two years, with 16.69% in 2010 and 15.92% in 2011. Avira, AVG and ESET follow in this year's rankings, each with over 10% of the market. Symantec holds the fifth position with 9.71% of the worldwide market. While some shifting has occurred between 2010 and 2011, 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.

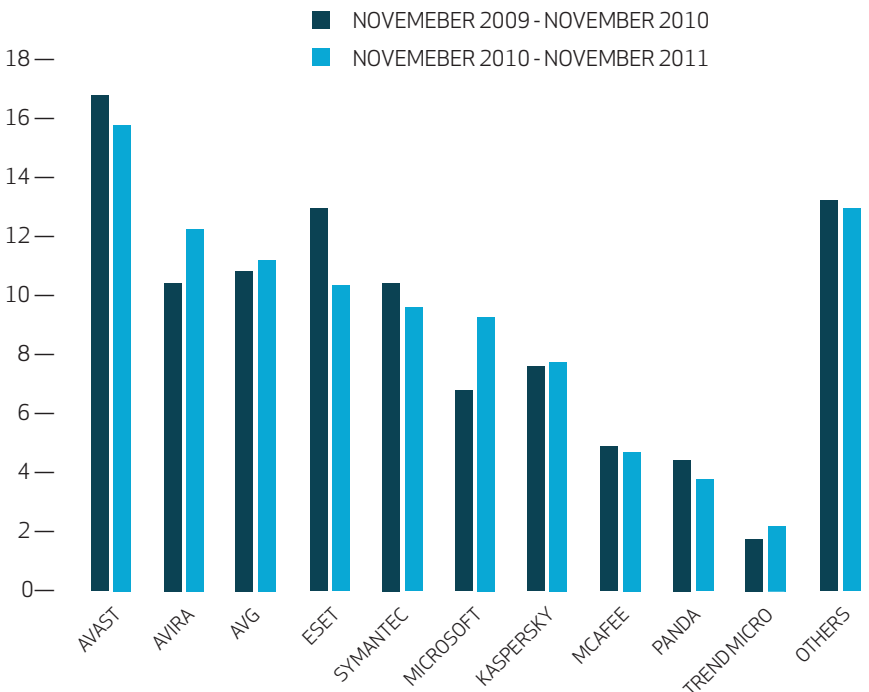
The percentage of the market held by the top 10 vendors was 87.12%, a slight increase from 86.77% in 2010.

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AVAST SOFTWARE	15.92%
AVIRA GMBH	12.13%
AVG TECHNOLOGIES	11.29%
ESET SOFTWARE	10.14%
SYMANTEC CORP.	9.71%
MICROSOFT CORP.	9.41%
KASPERSKY LABS	7.85%
MCAFFEE, INC.	4.64%
PANDA SECURITY	3.95%
TREND MICRO, INC.	2.08%
OTHERS	12.88%



2010 VS. 2011



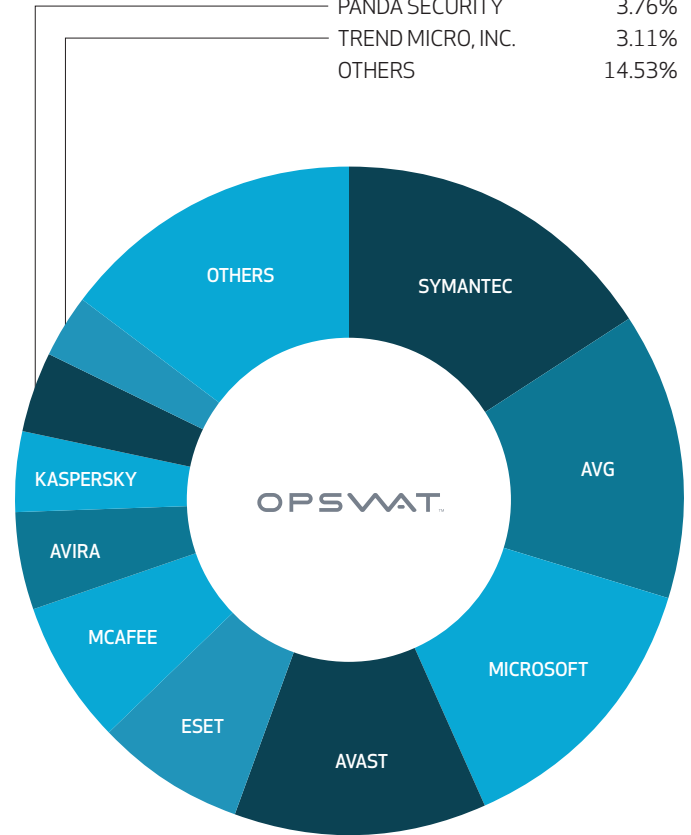
North America Antivirus Vendor Market Share

Symantec leads the North American Antivirus market in 2011 with 15.92%, a slight decrease from their 16.63% in 2010. AVG maintained the second highest share with an increase to 13.93% in 2011, and Microsoft rose to the third position in 2011 with 13.61% of the North American market. AVAST rose to 12.14% to stay in the fourth position.

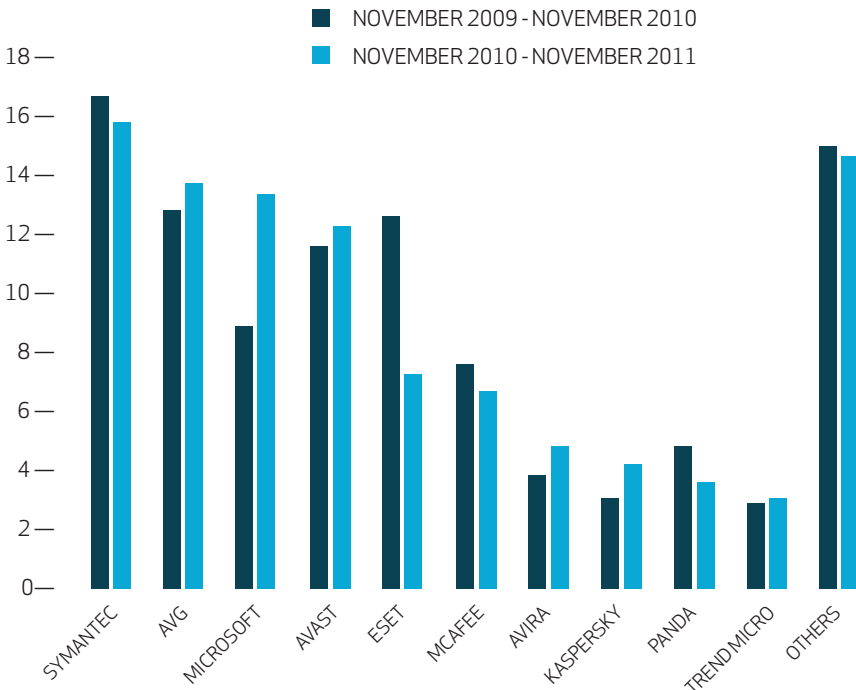
The top four vendors in this report control 55.60% of the market, and individually hold considerably higher shares of the market than the fifth largest vendor (ESET with 7.39%).

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SYMANTEC CORP.	15.92%
AVG TECHNOLOGIES	13.93%
MICROSOFT CORP.	13.61%
AVAST SOFTWARE	12.14%
ESET SOFTWARE	7.39%
MCAFEE, INC.	6.80%
AVIRA GMBH	4.70%
KASPERSKY LABS	4.11%
PANDA SECURITY	3.76%
TREND MICRO, INC.	3.11%
OTHERS	14.53%



2010 VS. 2011

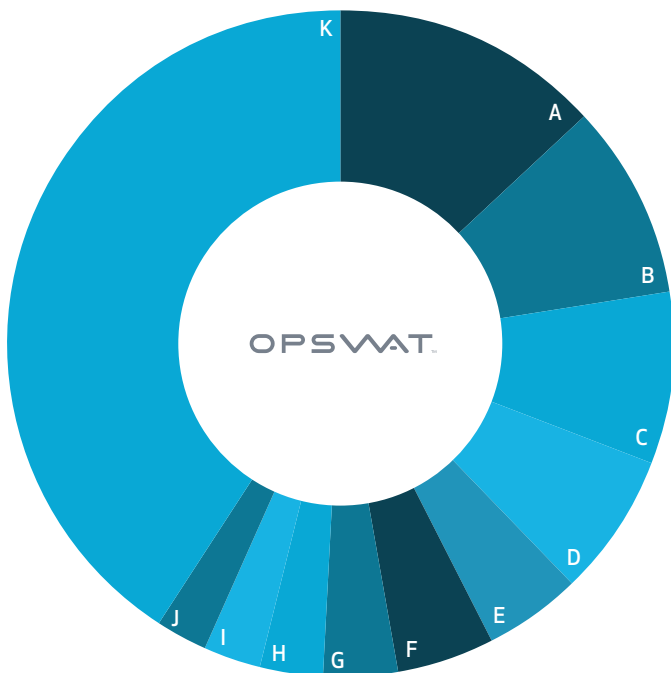


Antivirus Product Market Share

The top ten individual antivirus products in North America, A-J below, together control 59.25% of the North American AV market. Worldwide, the top ten products hold 62.06% of the market (shown on the next page). Microsoft's Security Essentials has a strong lead in the North American market, while avast! Free Antivirus leads worldwide.

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A	MICROSOFT SECURITY ESSENTIALS	13.29%
B	AVAST! FREE ANTIVIRUS	9.23%
C	AVG ANTIVIRUS FREE	8.52%
D	NORTON ANTIVIRUS	6.86%
E	ESET NOD32 ANTIVIRUS	4.73%
F	MCAFFEE VIRUSSCAN	4.68%
G	AVIRA ANTIVIR PERSONAL - FREE ANTIVIRUS	3.68%
H	NORTON 360	2.92%
I	AVG 10 [ANTIVIRUS]	2.88%
J	SYMANTEC ENDPOINT PROTECTION	2.46%
K	OTHERS	40.75%



Conclusions

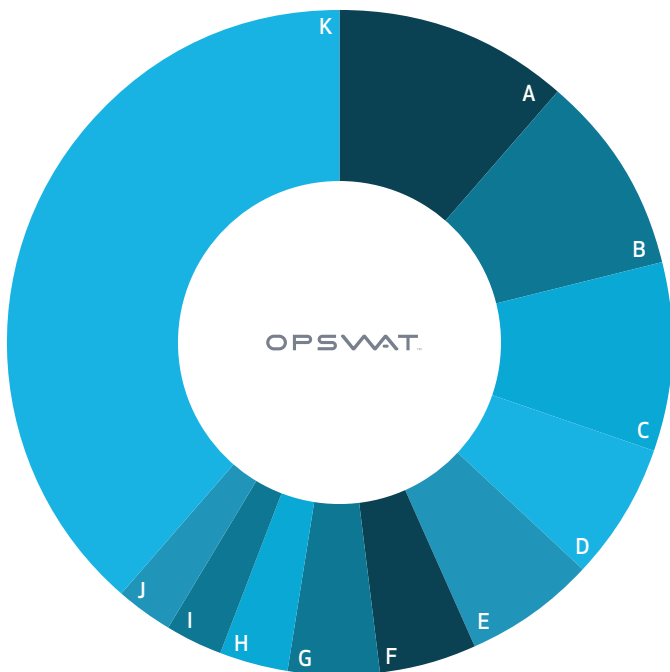
In North America, seventy-one different antivirus vendors and 238 antivirus products were detected in this report. Eighty-one vendors and 353 products were detected worldwide. A large percentage of the market is controlled by the top 5 vendors: 59.19% of the worldwide market is held by the top 5 vendors, and 62.99% of the North American market controlled by the top 5 vendors.

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.

Antivirus Product Market Share

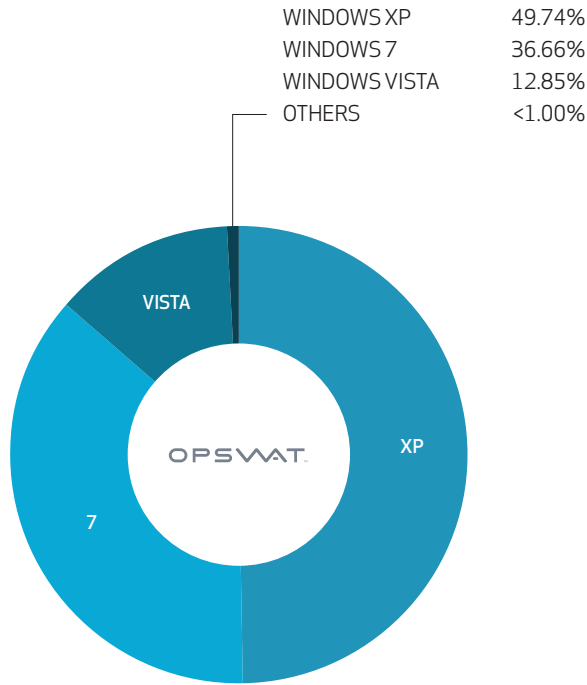
WORLDWIDE DECEMBER 2011

A	AVAST!FREE ANTIVIRUS	11.51%
B	AVIRA ANTIVIR PERSONAL - FREE ANTIVIRUS	10.01%
C	MICROSOFT SECURITY ESSENTIALS	9.29%
D	ESET NOD32 ANTIVIRUS	6.63%
E	AVG ANTIVIRUS FREE	6.44%
F	NORTON ANTIVIRUS	4.85%
G	KASPERSKY INTERNET SECURITY	4.47%
H	MCAFFEE VIRUSSCAN	3.16%
I	AVG 10 [ANTIVIRUS]	3.00%
J	ESET SMART SECURITY	2.70%
K	OTHERS	38.82%

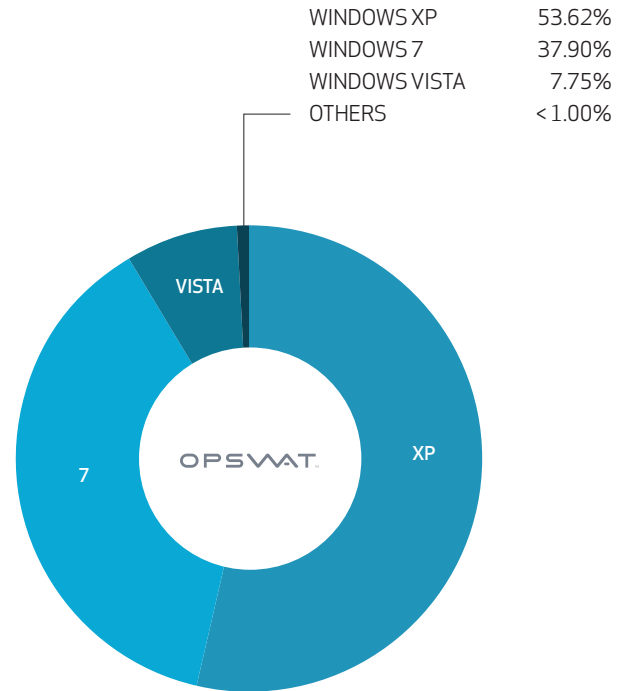


Windows Operating System Deployments

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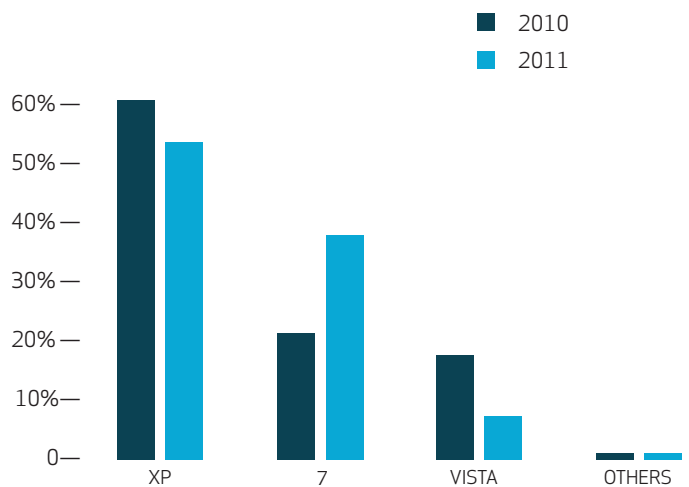
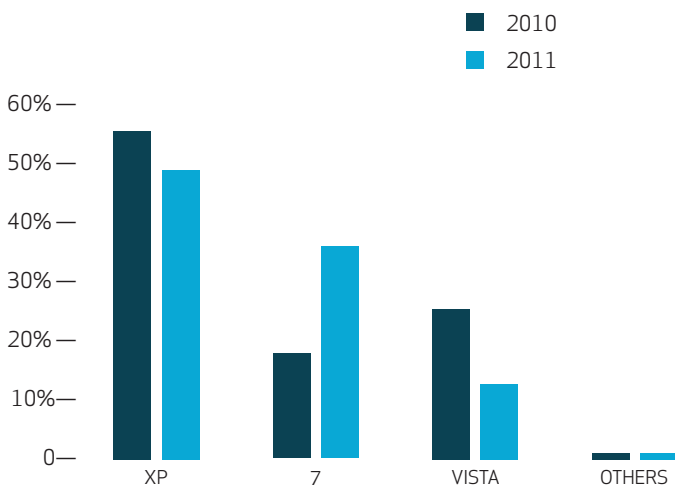


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OPSWAT's data for this report shows that Windows XP remains the dominant Windows Operating System in both North America and worldwide, with around half of computers using XP. Windows 7 usage is strong in both North America and worldwide, while Windows Vista is much less

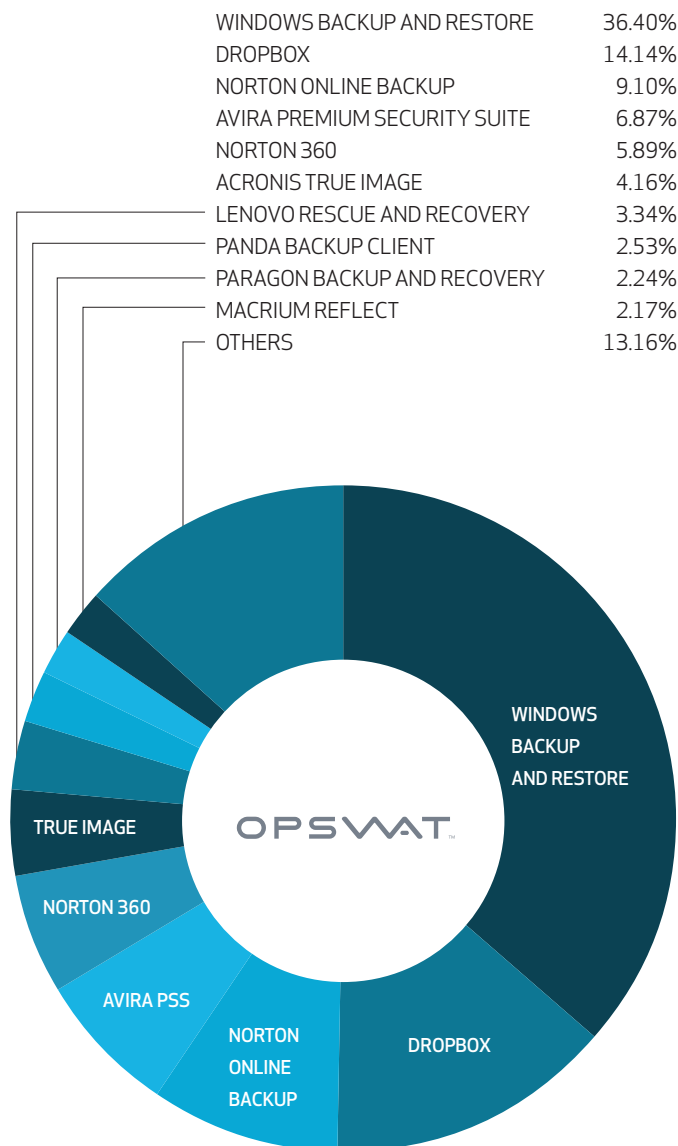
popular. Other operating systems represent less than one percent of the data for both regions. As seen in the comparison graphs below, usage of Windows XP and Windows Vista has decreased in the past year, while usage of Windows 7 has increased in both North America and worldwide.



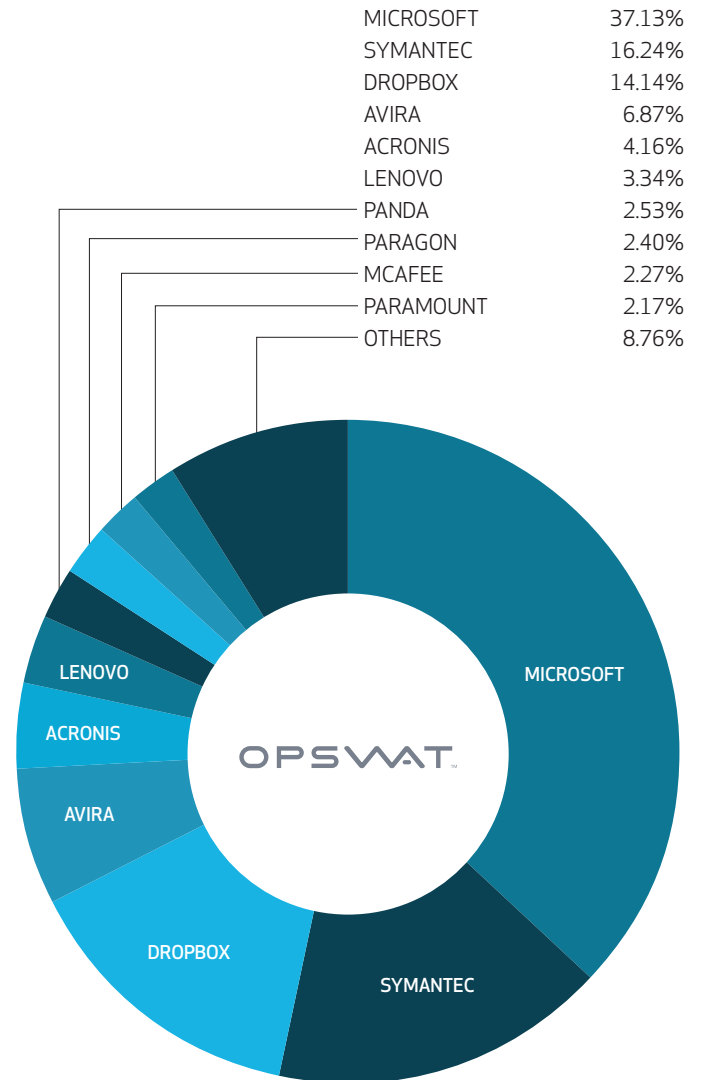
Backup Client Market Share

OPSWAT used both the detection capabilities of the OESIS Framework as well as registry information to determine the worldwide market share of well-known backup applications. The top backup vendors and individual products are shown in the graphs below. Microsoft leads the market, with installations of Windows Backup and Restore far exceeding installations of any other backup client. Dropbox is the second most common backup product, but as a vendor holds the third position, due to Symantec's share including multiple popular products.

BACKUP CLIENT MARKET SHARE WORLDWIDE 2011



BACKUP VENDOR MARKET SHARE WORLDWIDE 2011



March Peer to Peer Report Details

Don't miss our next quarterly market share report, coming in March! The next report will cover antivirus market share, Windows OS usage and peer to peer application market share.

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

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/partners/certification.



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.

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 Total Defense, 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.

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