



## Email, Web and IM Security Market Trends, 2009-2012

### Report Focus

---

This report is focused on the demand drivers for solutions that are designed to address email, instant messaging and Web-related security threats. The research conducted for this report, and the report itself, are focused on the needs of vendors, investors and others who are interested in participating in the email, instant messaging and Web security markets in some fashion. The information included in this report is designed to help these vendors and interested parties make informed decisions about the future opportunities available in this market.

### Key Findings and Trends Discussed in this Report

---

➤ **Web 2.0 Security Threats**

The number of respondents interested in investing in Web 2.0 gateway security grew reasonably compared to last year's survey, a testament to the growing variety and number of Web-based threats.

➤ **LinkedIn Is In, Facebook Is Suspect And MySpace Is Really Suspect**

While half of organizations allow Facebook use by their employees, only 28% of respondents (IT decision makers in mid-sized and large organizations) consider the application to be "legitimate" for business use. The same goes for Twitter, which was allowed by 49% of the organizations and yet viewed as not legitimate by 28% of respondents.

➤ **Satisfaction With Spam Capabilities is Increasing**

Since last year, nearly a third (31%) more respondents indicated that spam has gotten better for their organizations and 14% fewer respondents indicated that spam levels have gotten worse.

➤ **Cloud-Based Services Continue to Grow in Popularity**

Overall, the number of respondents who were neutral, very, extremely likely or had already deployed hosted security services grew by nine points more than last year to 63%. Over the next 12 months, hosted anti-spam services will show the greatest growth, climbing six percentage points. More so than last year, organizations are bullish about hosted security services, such as those offered by Kaspersky, Trend Micro and, more recently, Microsoft. Over the next 24 months, that number should grow to two-thirds of respondent organizations. Web security services are also an area of strong interest, as well. The number of respondents who are "very" interested or "extremely" interested will grow by six percentage points over the next 24 months.



- **DLP Is Still Hot**  
Organizations continue to place a premium on conventional security mechanisms, namely anti-virus and anti-spam software. With that said, there is markedly stronger interest in data leakage prevention (DLP) since last year, with nearly 40% of organizations considering the technology.
  
- **Comprehensive Security Solutions Are In**  
Only a fifth of the respondents indicated that they use a consolidated, comprehensive, centrally managed messaging security solution. The vast majority are dealing with separate vendors for their various best-of-breed solutions. Yet, when we examine what organizational decision makers want, the number of respondents who prefer a consolidated, comprehensive, centrally managed messaging security solution doubled, while individual, best-of-breed solutions dropped.
  
- **IT Spending Expected To Drop**  
Not surprisingly, IT expects to spend significantly less in 2009 than in 2008. This year 47% of respondents expected IT spending to be lower in 2009 versus 18% from last year. Similarly, while 48% of respondents last year expected spending to be higher in 2008, this year that number was down to 23% of organizations.

## Table of Contents

---

<b>Chapter 1</b>	
Executive Summary .....	1
<b>Chapter 2</b>	
Background and Methodology .....	7
<b>Chapter 3</b>	
Problems in Managing the Security Infrastructure.....	9
<b>Chapter 4</b>	
Key Feature and Function Requirements .....	21
<b>Chapter 5</b>	
Security Delivery Models.....	27
<b>Chapter 6</b>	
Planned Security Expenditures .....	33
<b>Chapter 7</b>	
IT 2009 Spending Plans and Security Market Forecast.....	47
<b>Chapter 8</b>	
Security Vendors.....	51



## List of Figures

---

North American Messaging and Web Security Market Forecast, 2009-2012.....	6
“Is the percentage of spam blocked by your anti-spam system(s) getting better, worse or staying the same over time?” .....	9
“Is the false positive ratio generated by your anti-spam system(s) getting better, worse or staying the same over time?”.....	10
Infiltrations and Problems That Have Occurred Between 2008 and 2009 .....	11
Organizations That Have Switched Security Vendors Between 2008 and 2009 .....	15
Legitimate vs. Non-Legitimate Applications .....	16
Applications Allowed and Not Allowed.....	17
Percentage of Organizations That Use Social Networking Tools for Marketing Purposes .....	19
Importance of Various Features in Terms of Their Importance in Switching or Replacing Existing Anti-Spam Solution(s).....	21
Importance of Various Features in Terms of Their Importance in Switching or Replacing Existing Anti-Malware Solution(s).....	22
Importance of Various Reasons for Deploying an Intrusion Protection (IPS) Solution .....	23
“Should reputation-based email security services be integrated with your other perimeter systems?” .....	24
“Does your organization require email messages to be reviewed and approved by others before being sent outside the organization?” .....	26
Current and Expected Breakdown of Anti-Virus Capabilities by Delivery Model .....	27
Current and Expected Breakdown of Anti-Spam Capabilities by Delivery Model .....	28
Desirability of Various Delivery Models for Basic (Anti-Virus, Anti-Spam, Basic Compliance) Email Security Capabilities .....	29
Desirability of Various Delivery Models for More Sophisticated Email Security Capabilities ...	30
Desirability of Various Models for More Sophisticated Email Security Capabilities.....	31
IT Person-Hours Per Week Per 1,000 Users Spent on Managing Messaging Security, Web Security and Backup/Archival Capabilities .....	33
Proportion of Users that Will Employ Wireless Handhelds to Access Email .....	35
“Have you considered implementing a reputation-based perimeter solution for filtering/blocking email?” .....	38
Likelihood of Definitely Using a Managed or Hosted Service Provider for Email Security Services During the Next 12 Months .....	42



## List of Figures (concluded)

---

Likelihood of Definitely Using a Managed or Hosted Service Provider for Email Security Services During the Next 24 Months.....	43
Likelihood of Definitely Using a Managed or Hosted Service Provider for Web Security Services During the Next 12 Months .....	44
Likelihood of Definitely Using a Managed or Hosted Service Provider for Web Security Services During the Next 24 Months.....	45
Plans for Overall IT Spending in 2009 Compared to 2008 .....	47
Plans for Email Security Spending in 2009 Compared to 2008 .....	48
Plans for Web Security Spending in 2009 Compared to 2008.....	48
Plans for Instant Messaging Security Spending in 2009 Compared to 2008.....	49
North American Messaging and Web Security Market Forecast, 2009-2012.....	50

## List of Tables

---

Breakdown of Users by Messaging Platform, 2009 and 2011.....	7
Seriousness of Various Management Problems .....	12
IT Views on Importance of Non-IT Management and Staff Participating in the Policy Management Function.....	20
Importance of Various Reasons for Deploying a Web Management Solution.....	25
Views on the Use of a Hosted/Cloud/SaaS Provider for Email Security .....	32
Areas in Which Organizations Will Increase Security Budgets in 2009 Compared to 2008.....	35
Likelihood of Investing in New Technologies Between April 2009 and April 2010 .....	36
Likelihood of Purchasing New Products Over the Next 18 Months, Either to Replace Existing Capabilities or for New Functionality .....	37
Messaging and Related Capabilities Deployed, Early 2009 and Late 2010 .....	39
Current Practices and Preferences for Managing Email Security Capabilities.....	40
Perception of the Value of Various Security Capabilities.....	41
Current Practice and Preference for Centralized Management of Security Capabilities.....	41
Likelihood of Considering Various Email Security Vendors .....	51
Publicly Available Financial Information for Leading Security Vendors.....	52



## About Osterman Research, Inc.

---

Osterman Research, Inc. provides market research, cost modeling, benchmarking and related services to vendors of messaging and collaboration products and services.

We help vendors, IT departments and other organizations make better decisions through the acquisition and application of relevant, accurate and timely data on markets, market trends, products and technologies. We also help vendors of technology-oriented products and services to understand the needs of their current and prospective customers.

Part of what makes us unique is our market research panel: a large and growing group of IT professionals and end-users around the world with whom we conduct our research surveys. This allows us to conduct surveys quickly and accurately.

**Email, Web and IM Security Market Trends, 2009-2012  
was published in June 2009 and is available for \$2,495**

For more information on Osterman Research,  
or if you have any questions about this  
report, please contact us at:

**Osterman Research, Inc.**

P.O. Box 1058

Black Diamond, WA 98010-1058

Tel: +1 253 630 5839

Fax: +1 253 458 0934

Email: [info@ostermanresearch.com](mailto:info@ostermanresearch.com)

<http://www.ostermanresearch.com>





## Order Form

# Email, Web and IM Security Market Trends, 2009-2012

**Available Immediately for \$2,495**

*Includes hard copy and electronic copy of report,  
as well as electronic copy of all survey data. All materials are provided  
with a subscriber-wide license and can be used throughout your organization.*

*This report can also be ordered online at  
<http://www.ostermanresearch.com/orderform.htm>*

BILLING INFORMATION	
Name	Telephone
Organization	Fax
Street Address	Email
City, State, Zip/Postal Code	Country
SHIPPING INFORMATION (if same as above, please leave blank)	
Name	Telephone
Organization	Fax
Street Address	Email
City, State, Zip/Postal Code	Country
<b>Method of Payment</b>	
<input type="checkbox"/> Visa	Credit card #: _____
<input type="checkbox"/> MasterCard	Exp. date (MM/YY): _____ / _____
<input type="checkbox"/> Please send invoice	Purchase order #: _____
<input type="checkbox"/> Payment is enclosed	
<input type="checkbox"/> Please contact me to arrange payment	
<b>Please note requested billing arrangements:</b>	