

Content security spend to grow sharply among small businesses

➤ Canalys outlines top content security market trends in the small business segment for 2012

Shanghai, Palo Alto, Singapore and Reading (UK) - for immediate release

Canalys today announced its latest enterprise content security market estimates, which indicate that total investment increased 3.5% worldwide between 2011 and 2012. Within this market segment, small business investment represented 28.4% of the total market (\$2.3 billion) in 2012. This equates to an increase of 5.4% over 2011, with key growth areas being anti-malware, web threat security and messaging security.

The main investment driver was the increased IT complexity that many businesses face. As the bring-your-own-technology trend gains momentum and cloud service adoption continues to grow, businesses today are faced with new challenges. These trends are more acutely felt by small businesses, which often do not have enough IT resources, in terms of finance and headcount. They also do not have the policies that typically govern the introduction of new technologies in larger enterprises.

‘Many small businesses changed their spending patterns during the year,’ said Canalys Analyst Nushin Vaiani. ‘There was greater demand for security solutions in the market, however, at the same time, many businesses were under budgetary constraints, thanks to the tough economic conditions. Vendors reacted by providing tailored solutions with greater functionality at more competitive price points.’

Worldwide small business content security market

| Vendor | 2011 market share % | 2012 market share % | Growth 2012/2011 |
|--------------------------|---------------------|---------------------|------------------|
| Total market value (\$m) | 2,182.1 | 2,299.9 | 5.4% |
| Trend Micro | 18.9% | 18.2% | 1.5% |
| McAfee | 17.2% | 16.2% | -0.6% |
| Symantec | 16.5% | 15.6% | -0.3% |
| Kaspersky Lab | 4.4% | 4.7% | 13.1% |
| Others | 43.0% | 45.3% | 1.2% |

Source: Canalys estimates, © Canalys 2013

Trend Micro maintained its global lead in this market segment, followed closely by McAfee and Symantec. All of the top three vendors launched dedicated SMB solutions during the year, which intensified competition. From a market share perspective, the top three experienced slight declines as emerging

vendors, such as Kaspersky Lab, increased their share of the market. 'These smaller vendors tend to be more agile and can react quickly to pricing changes and discounts in this crowded market,' added Vaiani.

Canalys forecasts this market will grow at a compound annual growth rate of 7.4% between 2012 and 2016. The market is expected to reach \$2.5 billion in value by the end of 2013, a rise of 10.4% on 2012.

Note: Canalys defines the content security market as including the following product categories: anti-malware, DLP, encryption, messaging security and web threat security.

Small businesses highlighted in this report are defined as those with fewer than 100 employees.

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