IDC MarketScape: Worldwide Email Security 2016 Vendor Assessment
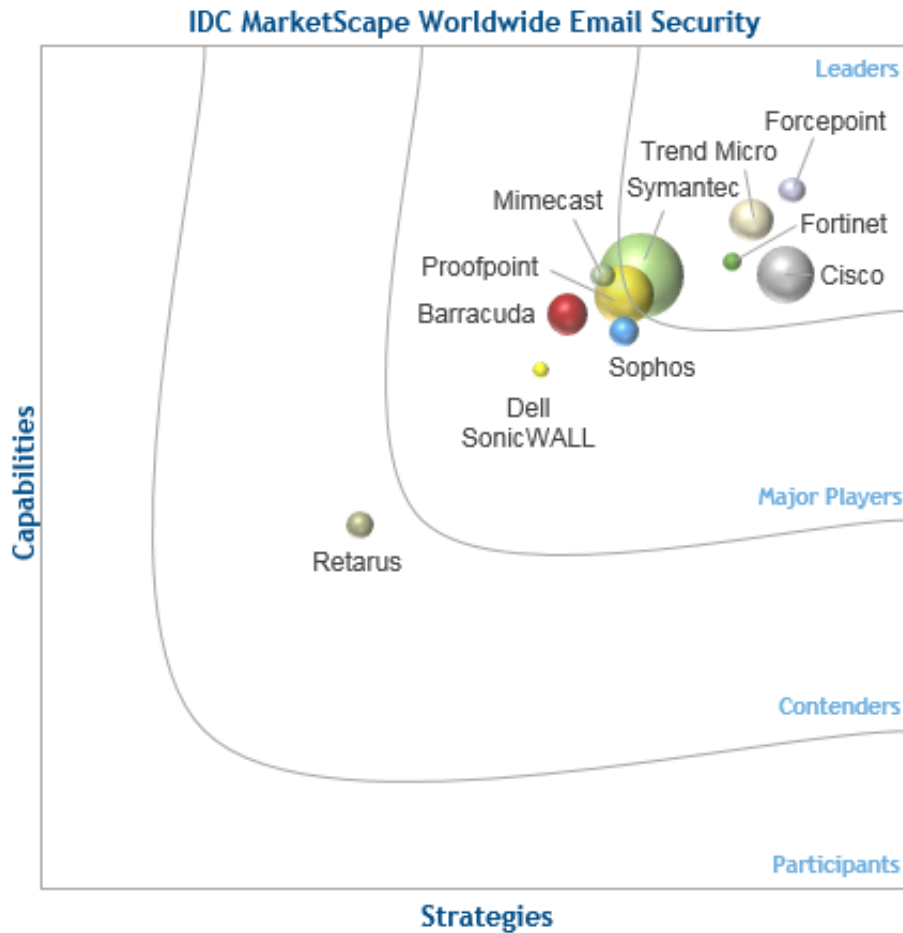
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THIS IDC MARKETSCAPE EXCERPT FEATURES: CISCO

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Email Security Vendor Assessment

Source: IDC, 2016

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Email Security 2016 Vendor Assessment (Doc # US41943716). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

The email security market is a mature market that is experiencing an influx of new features to deal with the adapting threats. Vendors are also dealing with the new interaction between email and other applications in business management solutions such as Office 365. Vendors need to be providing subscription-as-a-service (SaaS) and hybrid offerings alongside traditional software-on-premise and physical appliance solutions as many email products move to the cloud. As malicious actors spend more time on social engineering to create targeted attacks that would lead employees to be more likely to click on links or transfer funds, email security solutions need to be better than ever at blocking these targeted attacks. Anti-spear phishing, antiwhaling, and specialized threat analysis and protection (STAP) features are the best techniques to prevent these targeted attacks. Further:

- Email is one of the most common attack vectors inside an organization, so companies need to be able to rely on their security products.
- Companies should be looking for adaptable solutions that provide a breadth of feature and platform offerings where the email security products can be set up and work simply within the organization.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This IDC MarketScape includes vendors that are in the traditional email security gateway category, which includes features like antimalware, antispam, and content filtering for emails that come to the company. Vendors were also viewed across multiple platforms including physical appliances, software-on-premise, software as a service, hybrid, and virtual appliances. Other inclusion criteria include vendors with offerings sold on a worldwide scale (i.e., not focused on a particular region or geography) and vendors listed with at least $10 million dollars in worldwide product revenue. Further:

- **Full email security gateway capabilities.** Each email gateway vendor is required to possess full email security capabilities and support either full SaaS, on-premise, or physical appliance deployment models.
- **Revenue.** Each email security vendor is required to have total global email security revenue in excess of $10 million that was attained in 2015.
- **Date of analysis.** The email security vendor analysis in this study was written as of July 2016.
- **Data loss prevention.** Each email gateway vendor is required to have at least a data loss prevention technique available in their base product or as an add-on.
- **Geographic presence.** Each email gateway vendor is required to have a global presence.

Vendors included in this IDC MarketScape are Barracuda, Cisco, Dell SonicWALL, Forcepoint, Fortinet, Mimecast, Proofpoint, Retarus, Sophos, Symantec, and Trend Micro.

ESSENTIAL BUYER GUIDANCE

This IDC MarketScape assesses the current Leaders, Major Players, and Contenders in the worldwide email security market and rates these vendors based on the criteria most important to small, medium-sized, and large businesses and enterprise customers. Key factors companies must consider when selecting an email security vendor include:

- **Breadth of capabilities.** These capabilities include but are not limited to URL and document scanning, STAP features, mobile features, data loss prevention (DLP) features, and anti-spear phishing.
- **Range of delivery models.** This is the ability to offer hardware, software-on-premise, SaaS, and hybrid offerings.
- **Adjacent security technologies.** The vendors provide products like web security, DLP solutions, endpoint security, and network security products that integrate with their email offering.
- **Scalability and availability.** The vendors deliver email security capabilities to a diverse set of end users and devices and at a scale from small business to large enterprise.

VENDOR SUMMARY PROFILE

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of the vendor's strengths and challenges.

Cisco

Cisco is in the Leaders section in this IDC MarketScape because of its broad option of features and adjacent security products. Cisco has a long history in the appliance messaging market and has participated in the cloud security market since 2009. Cisco grows through both a strong acquisition and organic strategy. This vendor has been effective at integrating its new acquisitions, primarily because it takes its time to develop new products or features based off of its acquired technology.

Cisco is able to adapt quickly as a messaging security provider and will release updates that have competitive features after it becomes an advantage in the marketplace. This allows the company's clients to utilize new features but not be testers for any new idea that comes along for the messaging market. Recently, Cisco has focused on its AMP product line that can integrate currently but will have more integration over the next few years. This allows for sandboxing and file-reputation scanning for an additional fee. More conservative customers that want well-tested products and features while still consistently getting updates and new features, and customers who want to slowly transition to the cloud or maintain a hybrid environment should consider Cisco's product.

Cisco has been traditionally an enterprise-focused company but is working to try and break into the small and medium-sized business with a new pricing model for its email security product.

Strengths

- There are strong features for URL filtering, sandboxing, file reputation, graymail, and traditional antispam that blocks over 99% of malicious emails.

- Cisco provides an array of services options that assist customers in setting up its product, running the product for them, supplementing their security team, and providing health checks of its product to help any size company utilize its messaging product to the best of its ability.
- Cisco allows for a single license to be bought to utilize its hardware products and SaaS solution that creates a truly hybrid environment that allows customers to take their time transitioning, and all features are on both platforms creating an easy transition.
- Customers said the product was easy to implement and the help and training available online was helpful in setting up and keeping the product running.

Challenges

- Customers had a concern over the DLP features changing from RSA to Digital Guardian. Cisco could improve its communication with customers to ease their concern on any changes happening to added features not owned by Cisco.
- Integration across all products continues to be an issue as the company's messaging product does not integrate with the identity service engine (ISE) or FireSIGHT manager, although there are plans to fix this.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of a review board of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

The email security market is made up of email solutions that provide antispam, antimalware, content filtering, encryption, and data loss prevention (DLP) features for email. For the purposes of this study, IDC included vendors and products largely defined as secure email gateways, which integrate most of the features previously outlined into a single product offering.

Strategies and Capabilities Criteria

As part of this study, IDC examined the vendor offering strategy. This includes a review and comparison of product functionality and available delivery options. Also incorporated into the analysis were competitive licensing and pricing, support, and integration with a portfolio of products. The vendor offering strategy also included a review of the integration strategy and planned development to address customer requirements.

The study examined an offering's ability to monitor internal and external email and the processing speed of on-premise and appliance gateways. IDC also assessed the strength of each vendor's threat intelligence capabilities and how quickly protection can be delivered when new threats are identified.

IDC assessed the relative strength of each email security vendor's user community and its ability to engage with its customer base. It looked at presale and post-sale activities and the ability to keep up the technology and threat trends.

IDC also considered each vendor's go-to-market strategy. The review assessed the marketing strategy, sales and distribution strategy, and customer service effectiveness. The business strategy took into account each vendor's financial strength based on data provided by vendors and collected from publicly available sources.

LEARN MORE

Related Research

- *IDC MarketScape: Worldwide Web Security 2016 Vendor Assessment* (IDC #US41000015, February 2016)
- *Worldwide Messaging Security Market Shares, 2014: Concern Over Targeted Threats* (IDC #259606, October 2015)
- *Worldwide Messaging Security Forecast, 2015-2019: Protecting Against New Threats* (IDC #259159, September 2015)

Synopsis

This IDC study uses the vendor assessment model called IDC MarketScape, which pulls together a vendor's quantitative and qualitative characteristics to examine each vendor's market potential. The messaging security market is more mature, with most vendors providing standard functionality. This study examined email security integration and adjacent security technologies such as emerging solutions designed to detect targeted attacks. Some security vendors are closely integrating their advanced threat defense portfolio with traditional gateways, network, and endpoint security products. Vendors fared strongly if they could demonstrate fully capable platforms that had complete feature parity and centralized reporting and management capabilities.

"Vendors in the email security market are continuing to transition to cloud and provide hybrid offerings to benefit their customers in their transition to the cloud as well," said Elizabeth Corr, research analyst for IDC's Security Products.

About IDC

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