



### 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.

The research for this report was conducted, and this report was written, from a completely objective viewpoint, not with any predisposition for or against a particular vendor, solution or technology. Because multiple vendors were involved in funding this report, no one vendor's viewpoint had an influence on shaping the research focus. Early subscribers to this report were given the opportunity to provide input to the research program conducted specifically for it.

### Key Findings and Trends Discussed in this Report

---

➤ **The Biggest Threat?**

Web-borne threats continue to pose a grave danger to the enterprise. They can expose a network to severe security risks and their invasion of innocuous hosts makes them particularly dangerous. Enterprises are responding accordingly by making protection against Web-borne threats a chief concern.

➤ **Watch Your Information**

Data loss protection (DLP) systems will be a growing market for organizations in 2008 as most organizations aim to prevent information/data loss. The market for these systems is still very young, but growing at a substantial rate as noted in the forecast in this report.

➤ **Your Reputation Matters**

Traditional content filtering won't be enough to keep up with spam growth. Spammers are using image-based spam, PDF spam, calendar spam, spam in Excel files and other techniques to avoid content filters. Blocking these messages by leveraging conventional content-filtering technologies takes an enormous toll on anti-spam server or appliance CPU cycles.

➤ **Hybrid Solutions Will Become More Popular**

Hybrid solutions, in which on-premise security solutions are supplemented with an "in-the-cloud" solution as a sort of pre-filter, will become much more popular. This will be due, in large part, to the fact that sudden spikes in spam volumes can overwhelm



on-premise systems, resulting in message delivery problems or system crashes, more IT time required to address these problems, and additions to the on-premise infrastructure of appliances or servers.

- **The Time is Right for an Integrated Security Architecture**  
There is a strong in interest in an appliance pulling together all security functions, though there is some disagreement over whether this should be done by a single appliance or different vendors' solutions integrated through a common console.
- **Hosted Offerings are on the Increase**  
Enterprises still prefer in-house systems to hosted solutions, but that's starting to change.
- **What Do Organizations Look For in Messaging Security Offerings?**  
Respondents are placing less of an emphasis on brand reputation and integration with other security products from the same vendor and far more emphasis on price.

## Table of Contents

---

<b>Chapter 1</b>	
Executive Summary .....	1
<b>Chapter 2</b>	
Methodology and Overview .....	7
<b>Chapter 3</b>	
Current Security Infrastructure and Practices .....	9
<b>Chapter 4</b>	
Messaging and Security Problems .....	17
<b>Chapter 5</b>	
Messaging Security Features and Functions .....	25
<b>Chapter 6</b>	
Delivery Models .....	33
<b>Chapter 7</b>	
Plans for Security Deployments.....	41
<b>Chapter 8</b>	
Vendors .....	49



## List of Figures

---

North American Messaging Security Market Forecast, 2008-2011 .....	5
Percentage of Users Who Employ Wireless Handhelds to Access Email .....	12
Perceived Legitimacy of Various Applications Used in a Corporate Environment .....	13
Occurrence of Various Problems .....	20
Changes in Spam Capture Efficiency Over Time .....	22
Changes in Spam False Positive Ratios Over Time .....	23
“Should zero-hour virus protection be integrated with your anti-virus systems or should they be standalone systems?” .....	25
“Does your organization require email messages to be reviewed and approved by others before being sent outside the organization?” .....	26
“Have you considered implementing a reputation-based perimeter solution for filtering/blocking email?” .....	27
“Should reputation-based email security services be integrated with your other perimeter systems?” .....	28
Importance that the Encryption Solution Be Built Into The Email Security Gateway Instead of Being Managed as a Separate System .....	29
Planned Methods for Managing Anti-Virus Capabilities, 2008 and 2010 .....	35
Planned Methods for Managing Anti-Spam Capabilities, 2008 and 2010 .....	36
Desirability of Delivery Models for Basic and Sophisticated Email Security .....	37
Likelihood of Definitely Using a Managed or Hosted Provider .....	39
Likelihood of Considering Use of a Managed or Hosted Provider.....	40
Plans for IT Spending in 2008 Compared to 2007 .....	41
Initiatives for Which Organizations Have or Will Have Budget by Early 2009 .....	44
Planned System Purchases Through Summer 2009 .....	45
“Have you switched anti-virus vendors during the past year?” .....	49
“Have you switched anti-spam vendors during the past year?” .....	50
Importance of Various Decision Factors for Messaging Security Products.....	51



## List of Tables

---

Email Users by Primary Messaging System .....	7
Deployment of Various Systems, Early 2008 .....	9
Deployment of Various Systems, Late 2009 .....	10
Current Generation of Various Systems .....	11
Level of Agreement About Involving Others in Policy Management .....	15
Various Problems Experienced in Managing Messaging and Web Systems .....	17
Perceived Risks of Various Security Problems.....	21
Reasons for Deploying URL Filtering.....	30
Reasons for Deploying an Intrusion Protection Solution .....	31
Perceived Value of Various Security Capabilities .....	31
Costs for Managing a Messaging/Web Security Infrastructure .....	33
Current Practice vs. Preference for Delivering Messaging Security Services .....	34
Perceptions About Various Aspects of Using a Hosted/SaaS Service Provider for Email Security.....	38
Key Areas for Investment Through Early 2009 .....	42
Current Practice vs. Preference for Delivering Email Security Services.....	46
Ratings for Various Security Vendors.....	52
Publicly Available Financial Information for Leading Security Vendors .....	53



## 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, 2008-2011  
was published in May 2008 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: +1 866 842 3274

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

<http://www.ostermanresearch.com>



