Windows Antivirus

Worldwide Market Share Analysis
June 2010

OPSWAT™

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Market Share Analysis

Introduction

Although the true market share of security applications often remains hidden, software vendors will claim to dominate a market based on their sales numbers vs. the reported sales numbers of their competitors.[1] However, as a unique alternative, we are able to present the following report based purely on the detection of the applications that tens of thousands of users actually have installed on their endpoints.

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Founded in 2002, OPSWAT provides software engineers and IT pros with development tools and data services to power manageability and security solutions. The company's primary product is called OESIS Framework. The framework's application libraries are licensed by major technology companies like Cisco Systems, Juniper Networks, F5 Networks, Microsoft, Dell, HP and many others. As it has been adopted as the industry standard SDK for creating compliance and manageability applications, the framework has now been deployed in over 50 million endpoint systems worldwide.

To offer security software vendors a way to market their applications and to create partnerships with technology companies that license OESIS, OPSWAT created the OESIS OK Certification Program, which integrates their applications with OESIS and verifies and certifies their interoperability of security software applications with technology solutions like SSL VPN, network access control and support utilities.

The Research

Out of the 50 million endpoints that employ the OESIS Framework, OPSWAT collected data from hundreds of thousands of volunteers.

The information collected from OPSWAT's various tools had a high rate of correlation. That is to say, when comparing reports, despite these tools having different uses, percentages of antivirus product usage were consistent. This consistency would suggest our data has a high degree of reliability.

Because application detection relies on the detection capabilities of the OESIS Framework, data is limited to applications that are included in the framework's libraries.
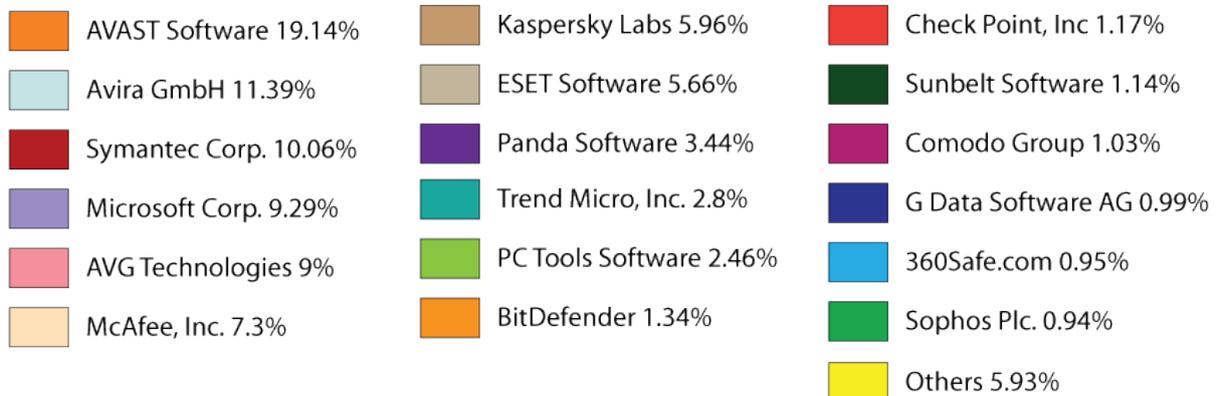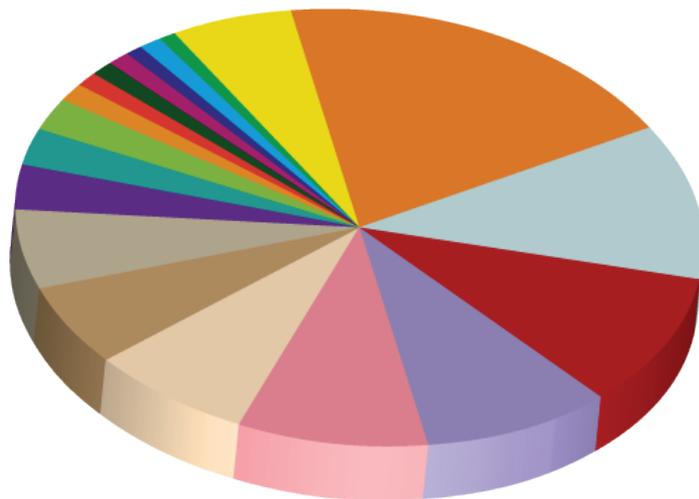
Antivirus vendors looking for inclusion in the OESIS Framework are free to partner with OPSWAT through the OESIS OK Certification Program.

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1. http://www.thewindowsclub.com/symantec-market-share-falls-mcafees-shows-growth

Antivirus Vendor Data

This graph breaks the data down by vendor. Though it might not be expected, companies that offer free products represent a majority of the market.

It is interesting to note that Microsoft, not typically associated with antivirus application success[1], has captured a significant share with their recent antivirus solutions. And that brand awareness, even with the significant amount Symantec and McAfee have[2] does not necessarily translate into having the most installs.

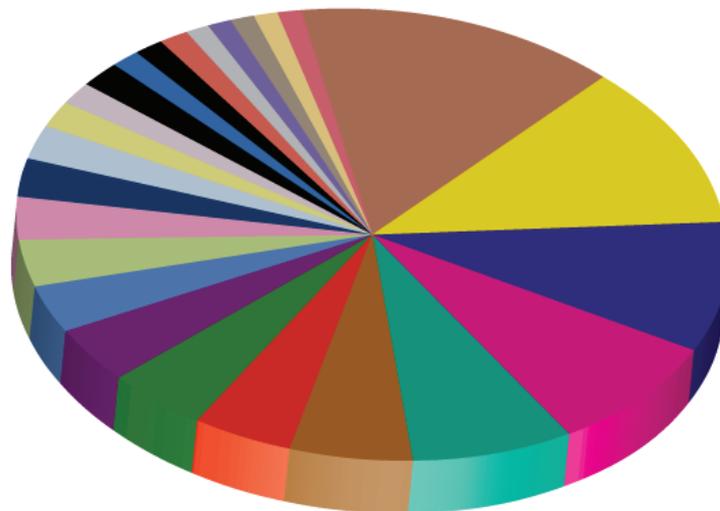|		
AVAST Software 19.14%	Kaspersky Labs 5.96%	Check Point, Inc 1.17%
Avira GmbH 11.39%	ESET Software 5.66%	Sunbelt Software 1.14%
Symantec Corp. 10.06%	Panda Software 3.44%	Comodo Group 1.03%
Microsoft Corp. 9.29%	Trend Micro, Inc. 2.8%	G Data Software AG 0.99%
AVG Technologies 9%	PC Tools Software 2.46%	360Safe.com 0.95%
McAfee, Inc. 7.3%	BitDefender 1.34%	Sophos Plc. 0.94%
		Others 5.93%

1. http://www.pcworld.com/article/129521/microsoft_onecare_last_in_antivirus_tests.html
2. http://www.infonetics.com/pr/2010/CRS-Security-Client-Deployment-Survey-Highlights.asp

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Antivirus Product Data

This graph breaks the data down into individual products. Note that specific versions have, for the most part, been eliminated. That is to say, as long as the product name has stayed the same, the data has been combined. For example, AVG Anti-Virus Free would include version 8, 8.5 and 9.

Here we see the free products capturing the top 4 spots. Also worth noting is that Kaspersky's Internet Security product suite is more popular than its individual antivirus application. Kaspersky is unique in this regard. Symantec's success on the vendor chart is explained by the appearance of 5 different Symantec products on this graph: Norton AntiVirus, Norton Internet Security, Symantec AntiVirus, Symantec Endpoint Protection and Norton 360.


avast! Free Antivirus 11.45%	avast! Antivirus Professional 3.1%	Symantec AntiVirus 1.44%
Avira AntiVir Personal - Free Antivirus 9.19%	McAfee VirusScan 3.06%	F-Secure Anti-Virus 1.41%
AVG Anti-Virus Free 8.6%	ESET Smart Security 2.13%	ThreatFire 1.15%
Microsoft Security Essentials 7.4%	Kaspersky Anti-Virus 1.87%	Norton 360 1.07%
avast! Antivirus 4.5%	Norton Internet Security 1.84%	Symantec Endpoint Protection 1.07%
Kaspersky Internet Security 4.09%	PC Tools Spyware Doctor 1.72%	Avira Premium Security Suite 1.01%
Norton AntiVirus 4.06%	Panda ActiveScan 1.67%	Avira AntiVir Premium 0.98%
ESET NOD32 Antivirus 3.53%	McAfee VirusScan Enterprise 1.49%	Trend Micro Internet Security 0.98%
		Others 21.19%

Antivirus Vendor Origin

This graph breaks the data down by the vendor's primary nationality. European vendors, which include: AVAST, Avira, AVG, ESET, Panda, BitDefender, G Data and Sophos total just over 50% of the market.

Whereas US-based vendors, which include: Symantec, Microsoft, McAfee, PC Tools and Sunbelt make up just over 30%.

-5-

- American 31%
- European 52%
- Others 17%
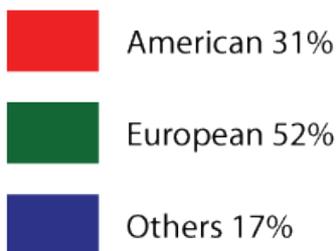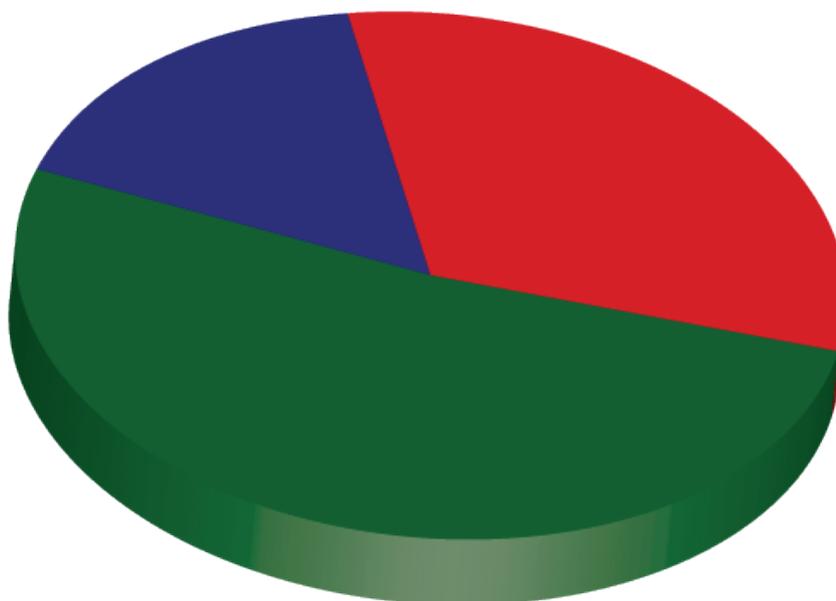
Operating System

The data that was collected is Windows only, as such Mac and Linux are not represented. However, we can present a snapshot of the current Windows marketplace and can see that Windows 7 has now surpassed Vista.

Windows Operating System Distribution

- Windows Vista
- Windows 7
- Windows XP
- Other
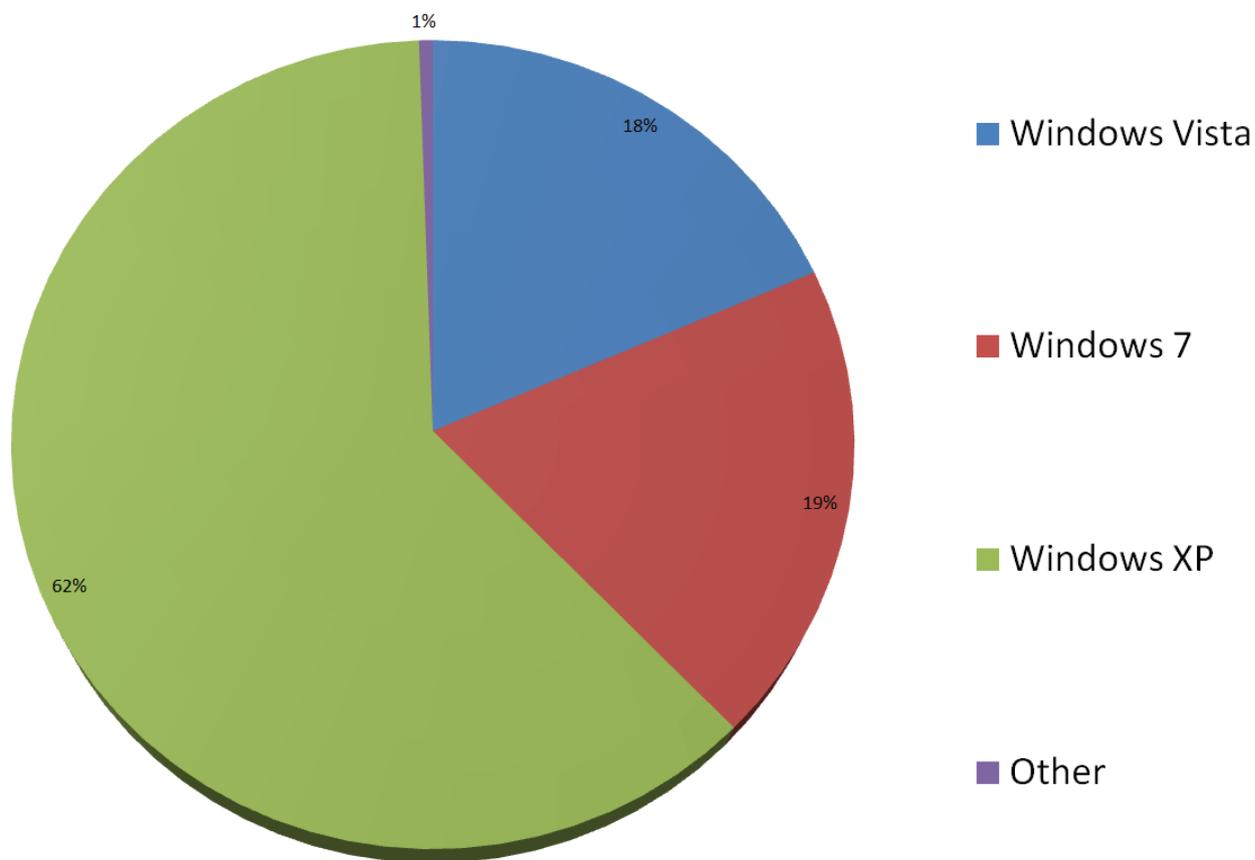
March 2010

Conclusions

It is useful to see the sheer variety of vendors that are occupying a 1-6% antivirus application market share. Though, in the United States, Symantec and McAfee are often positioned as the top choices[3], the reality is that competition is alive and well in this highly-fragmented sector. Innovations in anti-malware products are therefore, likely[4] partially a function of the increasing variety/intelligence of malware authors as well as a desire to stay afloat in a highly competitive marketplace.

European vendors, which include: AVAST, Avira, AVG, ESET, Panda, BitDefender, G Data and Sophos total just over 50% of the market. Whereas US-based vendors, which include: Symantec, Microsoft, McAfee, PC Tools (acquired by Symantec), Sunbelt and Comodo make up just over 30%.

Microsoft has established itself as a significant competitor in the security application space, making the WA-based giant a legitimate challenger to pure-play security players Symantec[1] and McAfee[2].

42% of the product market is controlled by free products, while vendors that primarily offer a free product have a 48% market share. It would appear that end users have as much faith in the ability of free antivirus applications to keep them secure as they do paid antivirus.

Future Reports

This is the first in what will be a series of reports using OPSWAT's rich data bed. In the future we will be able to cover other products—like hard disk encryption applications—in addition to comparing data by geographical distribution and historical trending.

1. http://www.informationweek.com/news/security/showArticle.jhtml?articleID=60401118
2. http://news.cnet.com/8301-1009_3-10102376-83.html
3. http://www.gartner.com/DisplayDocument?id=962714
4. http://www.economics.harvard.edu/faculty/aghion/files/comp_and_innov.pdf