Windows Antivirus

Market Share Analysis
September 2010

North America

Contents

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Introduction

This follow up to OPSWAT's June 2010 antivirus market share report includes additional comparative data; breaking down the market share of the sixteen most popular antivirus applications for four continents.

Please note that this is a sample report, which only contains data for North America.

OPSWAT

Founded in 2002, OPSWAT provides software engineers and IT professionals with development tools and data services to power manageability and security solutions. The company's primary product, OESIS Framework, is a manageability solution licensed by major technology companies like Cisco Systems, Juniper Networks, F5 Networks, Microsoft, HP and many others. Having been adopted as the industry standard software development toolkit (SDK) for creating compliance and manageability applications, the framework's application libraries have now been deployed on over fifty million endpoint systems worldwide. To learn more about OESIS, please visit the product page at http://www.opswat.com/products/oesis-frameworkae.

The Research

Using data collected from a sample of the fifty million endpoints that employ the OESIS Framework, OPSWAT analyzed more than thirty-five thousand reports submitted between July 1 and August 15, 2010.

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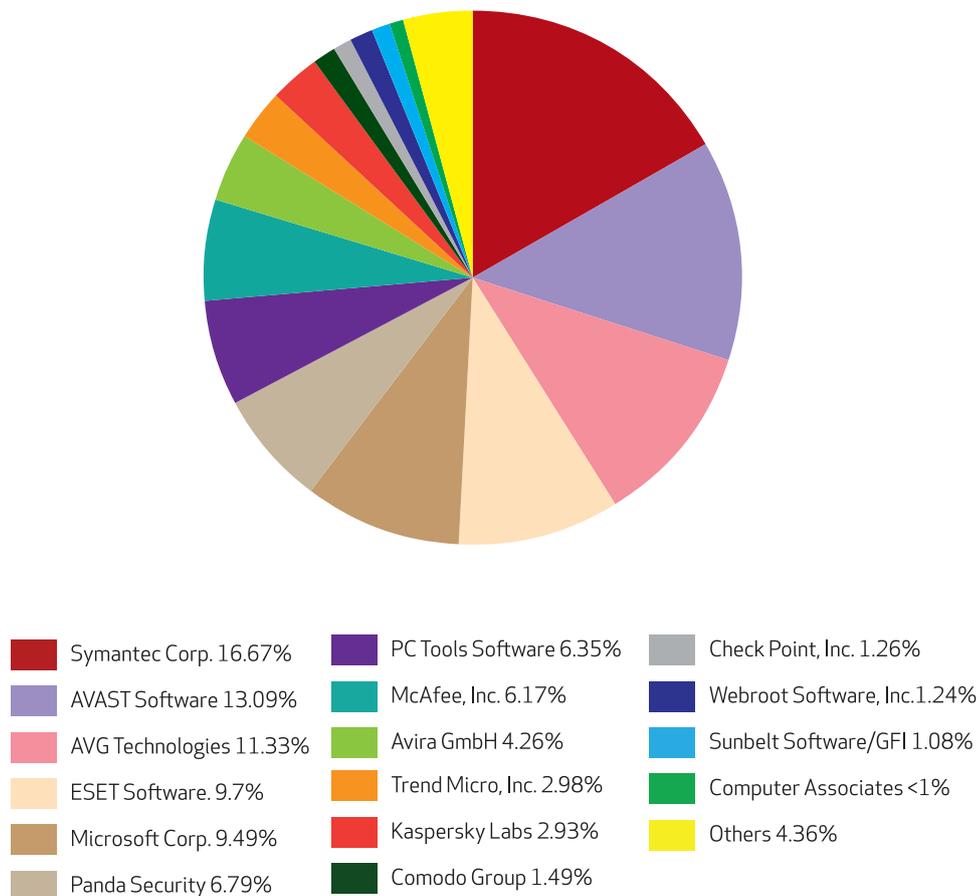
To offer security software vendors a way to market their applications and create partnerships with technology companies, OPSWAT created the OESIS OK Certification Program. This program integrates security applications with OESIS and verifies and certifies their interoperability with technology solutions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

Antivirus Vendor Data - North America

North America shows a dramatic shift from the other continents studied in that it is the only region to have applications from a "paid" provider leading in market share. Their hypothesis for this is due to Symantec's Norton product line often coming pre-installed free on new consumer PCs, in addition to their use of rebate and "freebate" promotions. Their list of OEM partners is extensive and includes most of the leading providers of PCs and notebooks, giving them a significant advantage in distribution of their products.[1]

North America shows that even though Symantec is controlling the market share with their distribution strategies, free antivirus software vendors still command a sizable portion of the market more in line with findings from other continents.

Two application vendors appear only in the data for the North American market: GFI (formerly Sunbelt Software) and CA (Computer Associates).

■ Symantec Corp. 16.67%	■ PC Tools Software 6.35%	■ Check Point, Inc. 1.26%
■ AVAST Software 13.09%	■ McAfee, Inc. 6.17%	■ Webroot Software, Inc.1.24%
■ AVG Technologies 11.33%	■ Avira GmbH 4.26%	■ Sunbelt Software/GFI 1.08%
■ ESET Software. 9.7%	■ Trend Micro, Inc. 2.98%	■ Computer Associates <1%
■ Microsoft Corp. 9.49%	■ Kaspersky Labs 2.93%	■ Others 4.36%
■ Panda Security 6.79%	■ Comodo Group 1.49%	

1. http://www.symantec.com/partners/programs/technology-partners/oem-partner-list.jsp

Antivirus Vendor Data - North America Comparison: June 2010

This chart shows the North American data from the June 2010 Worldwide Antivirus report. Some noteworthy highlights from comparing our June data to our current findings are a 2.28 percentage point increase for Symantec (resulting in them leading the market from our research), and slight declines in market share from AVG, AVAST and ESET.
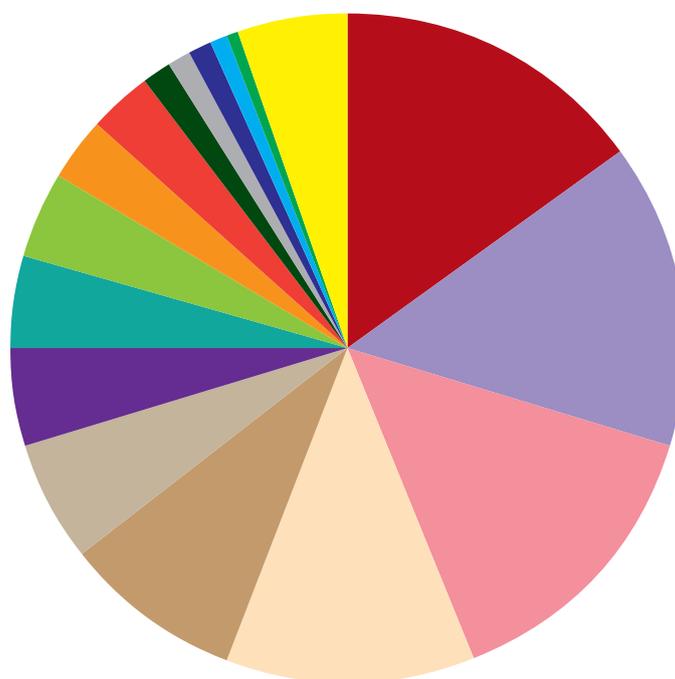

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■ AVAST Software 14.9%	■ Panda Software 4.89%	■ Computer Associates 1.16%
■ AVG Technologies 14.57%	■ Avira GmbH 4.43%	■ F-Secure Corp. 1%
■ Symantec Corp.14.39%	■ PC Tools Software. 3.92%	■ BitDefender <1%
■ ESET Software 11.84%	■ Trend Micro, Inc. 3.2%	■ Webroot Software <1%
■ Microsoft Corp. 8.48%	■ Kaspersky Labs 3.1%	■ Others 5.35%
■ McAfee, Inc. 5.93%	■ Check Point, Inc. 1.39%	

Windows Operating System - North America

Our data for North America indicates that users are still slow to move away from Windows XP. When comparing this data to our June 2010 Worldwide Windows distribution report we see fewer deployments of Windows XP (56% vs. 62%), and signs that Windows Vista was more readily adopted than the worldwide average (23% vs 16%).

North America - September 2010
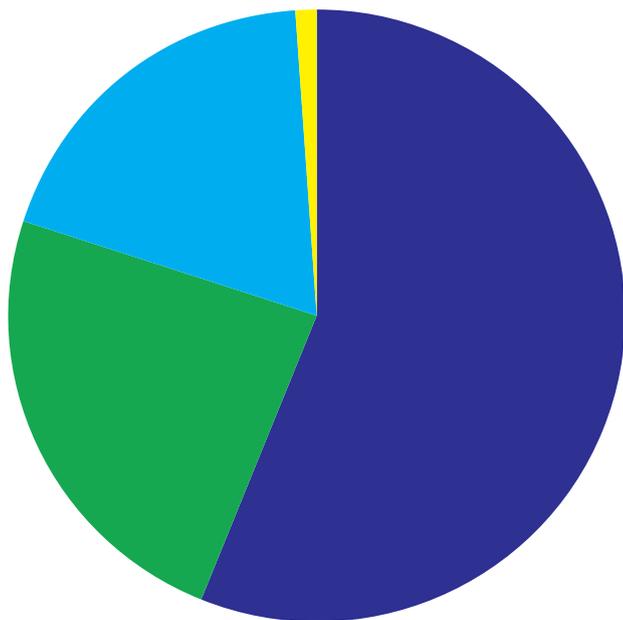
- Windows XP 56.01%
- Windows Vista 23.87%
- Windows 7 18.91%
- Other 1.26%

Worldwide - June 2010
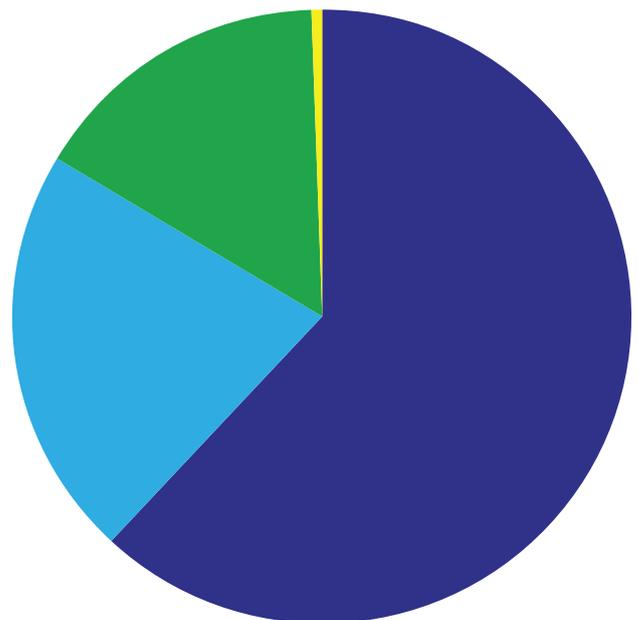
- Windows XP 61.97%
- Windows 7 21.67%
- Windows Vista 15.8%
- Other <1%

OPSWAT

Conclusions

A variety of free products control the worldwide market, with each region having a unique mix of market leaders.

In the case of North America, it is clear Symantec's strategy of pre-installing their software on new systems from their OEM partners is paying off by giving them a lead in market share. North America is unique in this regard, however, as the rest of the world's markets tend to be controlled by applications more traditionally associated with the concept of a "free" antivirus.

With the additional segmentation by continent in this report we are better able to see variation of a given vendor's market share by geography. We have found that even the most well-known vendors may dominate the market share in one region yet be outside the top five in another.

Full Report

A full version of this report is available for $1,250 which includes additional information:

- Antivirus and operating system data for South America, Europe and Asia.
- Further detailed antivirus and operating system data for the United States, Germany and China.
- A comparison between the September 2010 and June 2010 data for each continent.

To purchase, please contact marketing@opswat.com.

Parties interested in hosting this report are free to do so as long as credit is given to OPSWAT, Inc. and a link is provided to www.oesisok.com.