

Security Industry Market Share Analysis

June 2011

Introduction

OPSWAT releases quarterly market share reports for several sectors of the security industry. This quarter's report includes both worldwide and North American market share and usage data for antivirus software, Windows Operating Systems, and for the first time, instant messaging applications. The data used was collected between March 23, 2011 and May 15, 2011. Please note that OPSWAT is not a research institution; this report aims to distribute the unique data collected to inspire public discussion, not to make any claims as to why changes have occurred.

About OPSWAT

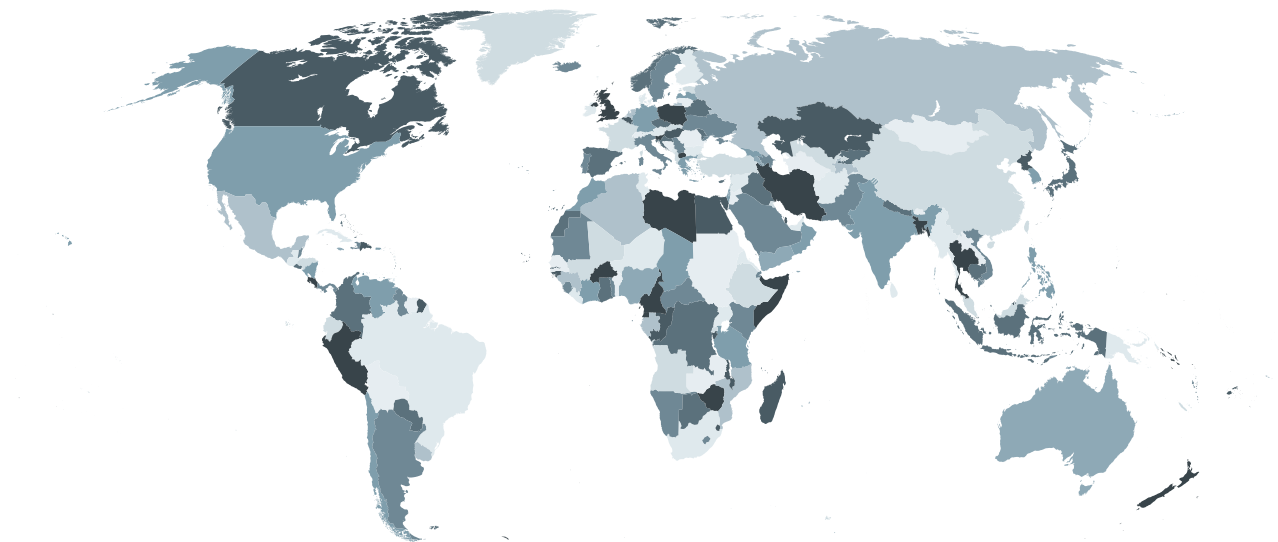
Founded in 2002, OPSWAT provides software engineers and IT professionals with development tools and data services to power manageability and security solutions. The company's primary product, OESIS Framework, is a manageability solution licensed by major technology companies like Cisco Systems, Juniper 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 an estimated hundred million endpoint systems worldwide. To learn more about OESIS, please visit the product page at www.opswat.com/products/oesis-frameworkae.

The Research

This report shows usage data for security applications on Windows systems. The data was collected using OPSWAT's AppRemover and Am I OESIS OK? tools, which utilize the detection capabilities of the OESIS Framework to collect information regarding the applications installed on endpoint computers. These tools are free for download on www.appremover.com and www.opswat.com/certified/am-i-oesis-ok, and are used around the world by home and business users, both expert and inexperienced in security software. The sample is assumed to be representative of the market based on the wide accessibility of these tools to a large range of users.

If the user of the tool opts in, a report of the applications installed on the computer is created. These opt-in reports are compiled to generate the market share calculations in this report. More than 43,000 data points were compiled for this report.

In addition to applications detected by the OESIS Framework, other well known applications are also included in the instant messaging market share based on registry searches. OPSWAT acknowledges that not every security application is included in this report. Antivirus, instant messenger and other security application vendors interested in inclusion in these reports and the OESIS Framework are encouraged to contact certification@opswat.com to learn how to partner with OPSWAT.

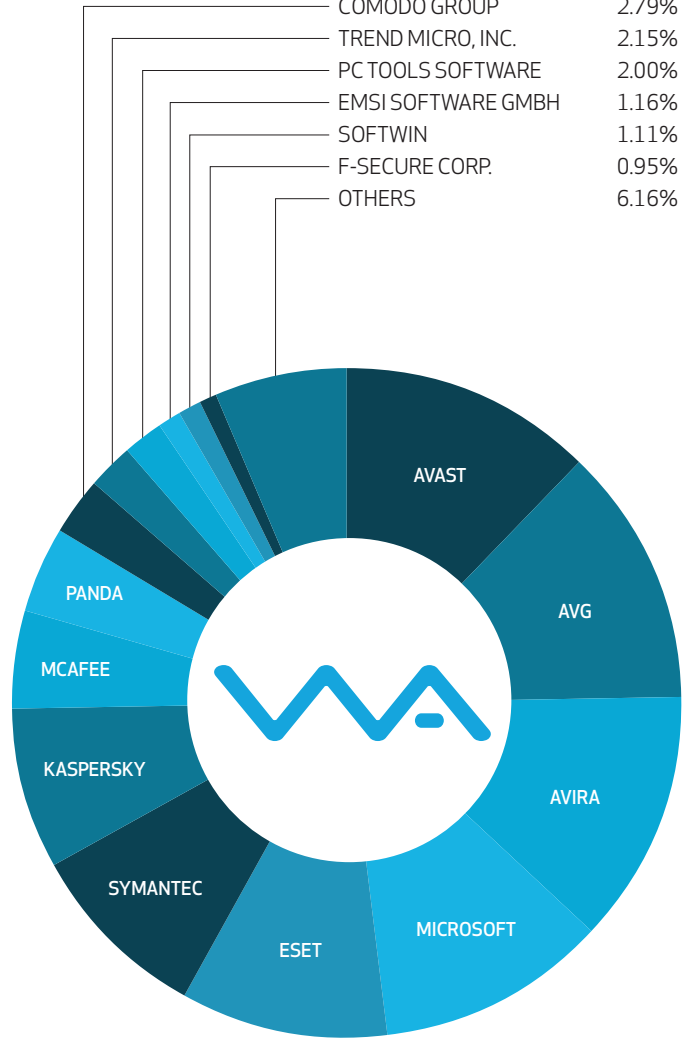


Worldwide Antivirus Vendor Market Share

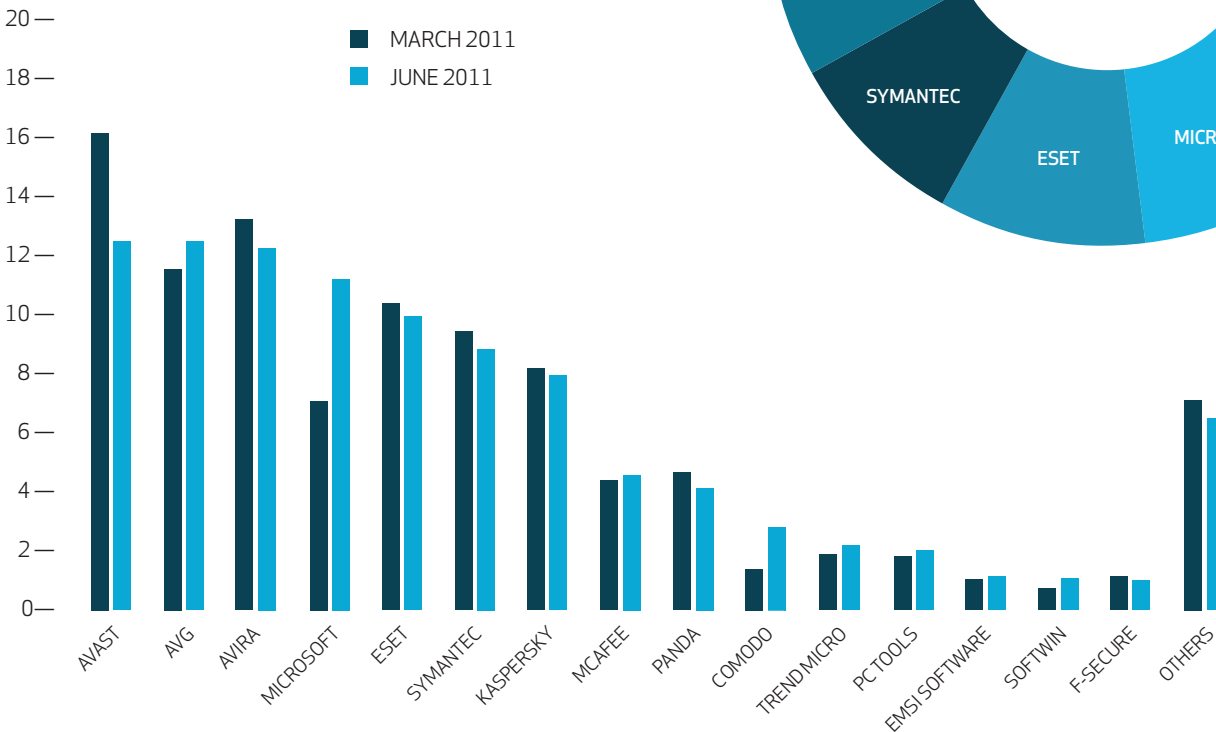
AVAST Software and AVG Technologies both top this quarter's worldwide antivirus market with 12.37% each. AVAST shows a decrease from its leading 16.19% last quarter, which could be due to a shift in the percentage of data originating from various countries. Avira and Microsoft rank third and fourth with 12.29% and 11.24% of the market, respectively. Microsoft's gain from last quarter could be attributed to the distribution advantage that Microsoft Security Essentials holds due to the convenient installation through Windows Update and its smooth integration with the popular IE browser. Comodo also shows a noticeable increase in this report, rising from 1.27% last quarter to 2.79% this quarter. Several other vendors increased their market share from OPSWAT's last report as well, including AVG, McAfee, Trend Micro, PC Tools, Emsi Software and

WORLDWIDE JUNE 2011

AVAST SOFTWARE	12.37%
AVG TECHNOLOGIES	12.37%
AVIRA GMBH	12.29%
MICROSOFT CORP.	11.24%
ESET SOFTWARE	9.98%
SYMANTEC CORP.	8.77%
KASPERSKY LABS	7.98%
MCAFEE, INC.	4.50%
PANDA SECURITY	4.18%
COMODO GROUP	2.79%
TREND MICRO, INC.	2.15%
PC TOOLS SOFTWARE	2.00%
EMSI SOFTWARE GMBH	1.16%
SOFTWIN	1.11%
F-SECURE CORP.	0.95%
OTHERS	6.16%



MARCH 2011 VS. JUNE 2011

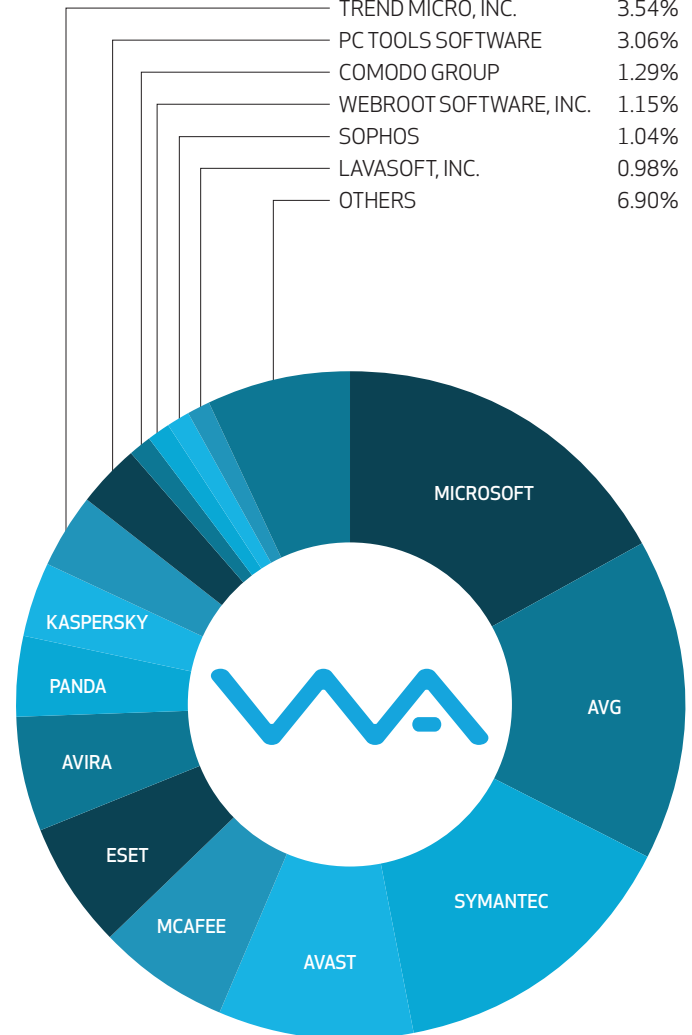


N. America Antivirus Vendor Market Share

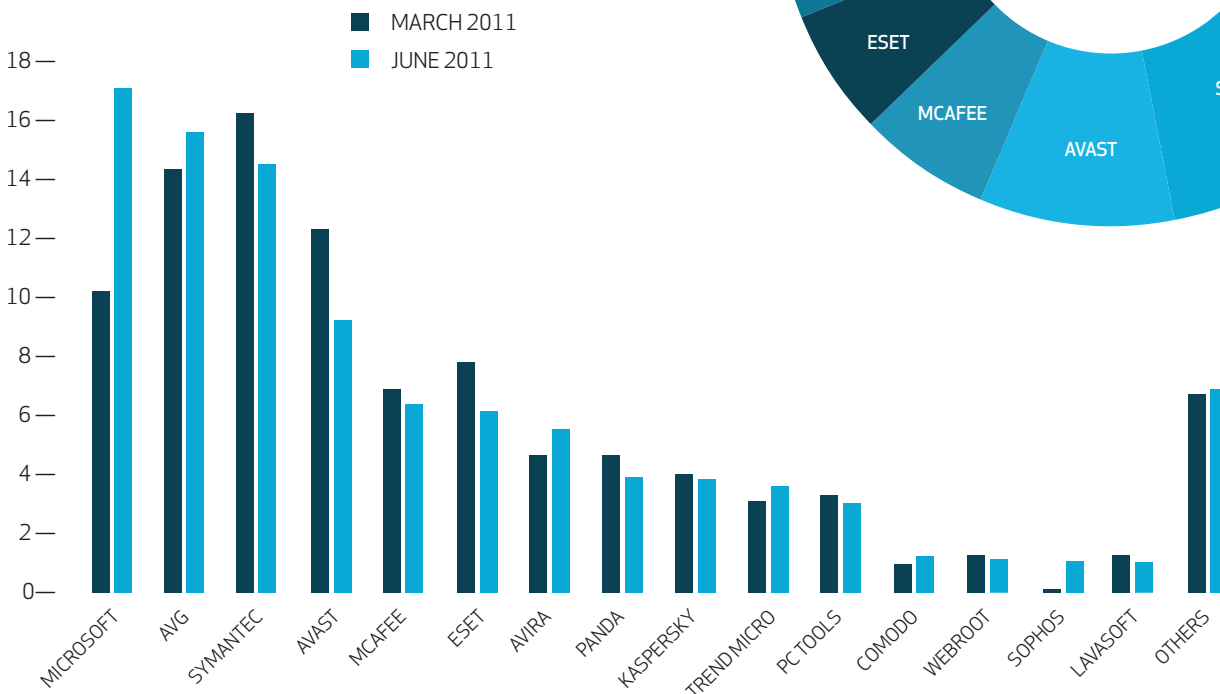
Microsoft increased substantially since OPSWAT's last report, rising to the top of the market and surpassing Symantec, who held the lead for the past three consecutive quarters. As mentioned for global market share, Microsoft's rise could be linked with the visibility and easy installation of their antivirus software through Windows Update as well as its compatibility with other leading Microsoft products. AVG also rose this quarter to hold the second leading position for the second consecutive quarter. Symantec rounds out the top three with 14.47% of the North American market. For the first time in OPSWAT's past three reports, AVAST is not one of the top three vendors in North America, possibly related to the altering breakdown of the data's countries of origin. Several countries where AVAST has led in past reports accounted for smaller percentages of this report's data.

NORTH AMERICA JUNE 2011

MICROSOFT CORP.	17.07%
AVG TECHNOLOGIES	15.63%
SYMANTEC CORP.	14.47%
AVAST SOFTWARE	9.21%
MCAFFEE, INC.	6.42%
ESET SOFTWARE	6.13%
AVIRA GMBH	5.50%
PANDA SECURITY	3.94%
KASPERSKY LABS	3.65%
TREND MICRO, INC.	3.54%
PC TOOLS SOFTWARE	3.06%
COMODO GROUP	1.29%
WEBROOT SOFTWARE, INC.	1.15%
SOPHOS	1.04%
LAVASOFT, INC.	0.98%
OTHERS	6.90%



MARCH 2011 VS. JUNE 2011

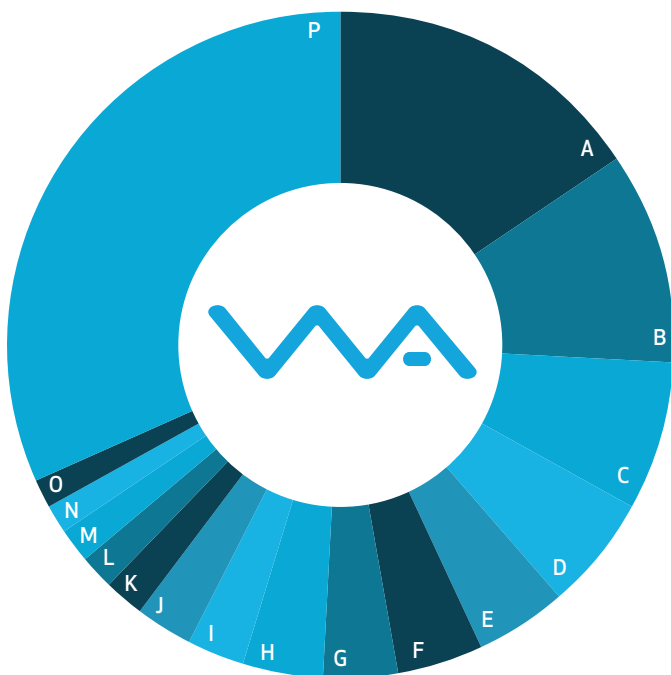


Antivirus Product Market Share

The top ten individual antivirus products in North America have continued to increase their combined share of the market. A-J below together control 60.38% of the North American AV market. Microsoft's Security Essentials Antivirus continues to lead with 15.68% of the market, and four free antivirus solutions remain dominant, with each of the top 3 products in North America available free for download.

NORTH AMERICA JUNE 2011

A	MICROSOFT SECURITY ESSENTIALS (ANTIVIRUS)	15.68%
B	AVG ANTIVIRUS FREE	10.36%
C	AVAST!FREE ANTIVIRUS	7.07%
D	NORTON ANTIVIRUS	5.71%
E	MCAFFEE VIRUSSCAN	4.40%
F	ESET NOD32 ANTIVIRUS	4.07%
G	AVIRA ANTIVIR PERSONAL - FREE ANTIVIRUS	3.81%
H	AVG 10 [ANTIVIRUS]	3.73%
I	SYMANTEC ENDPOINT PROTECTION	2.92%
J	NORTON 360	2.63%
K	MCAFFEE VIRUSSCAN ENTERPRISE	1.94%
L	PANDA CLOUD ANTIVIRUS	1.79%
M	KASPERSKY INTERNET SECURITY	1.58%
N	KASPERSKY ANTIVIRUS	1.50%
O	ESET SMART SECURITY	1.31%
P	OTHERS	31.50%



Conclusions

In North America, fifty-one different antivirus vendors were detected in this report. The top five of those vendors combined to control 62.80% of the antivirus market. The worldwide market is slightly more distributed, with sixty-two vendors and 58.25% of the antivirus market controlled by the top five vendors.

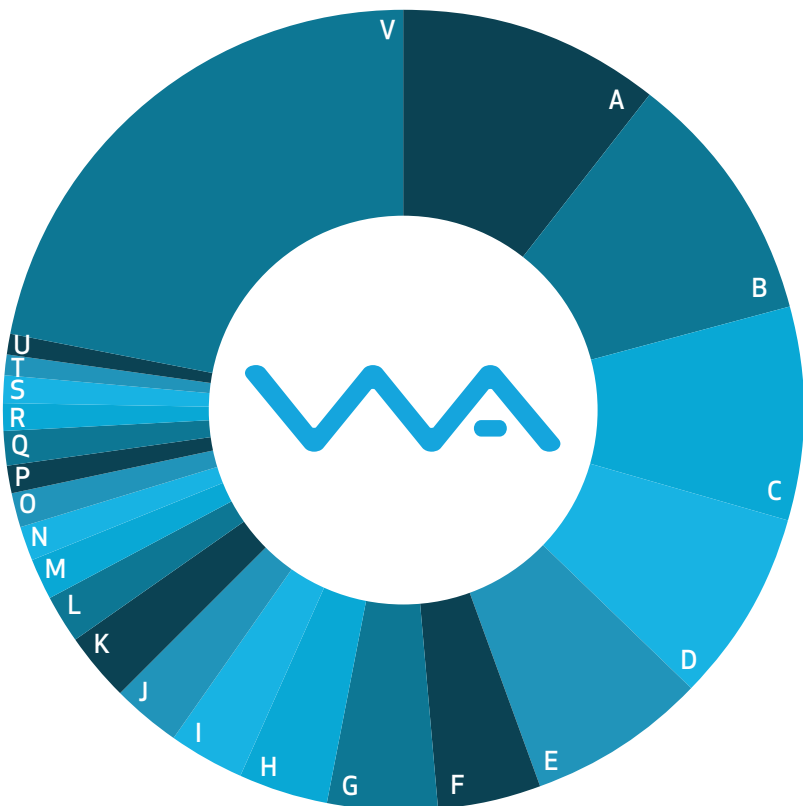
Free solutions maintain their high levels of installations noted in our previous reports, both in North America and worldwide. They can be seen at the top of the individual product markets for both regions. The top three products in North America and worldwide correlate with high ranking vendors as well.

Several companies who fare very well in the worldwide market still have yet to achieve a large share of the North American market. Both Avira and Kaspersky have more than twice as much market share worldwide than in North America. Similarly, McAfee is one of the top five antivirus vendors in North America, but is only eighth worldwide.

Antivirus Product Market Share

WORLDWIDE JUNE 2011

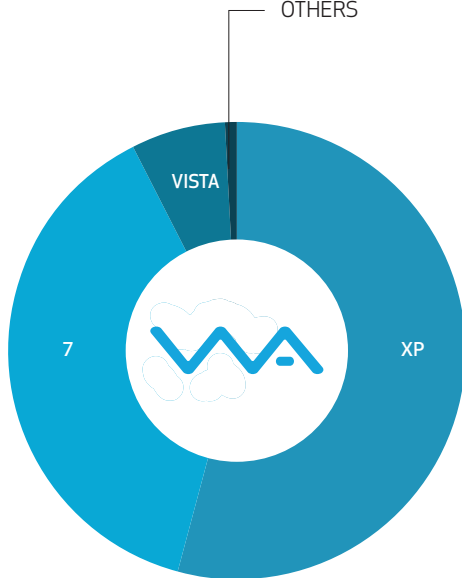
A	MICROSOFT SECURITY ESSENTIALS (ANTIVIRUS)	10.66%
B	AVIRA ANTIVIR PERSONAL - FREE ANTIVIRUS	10.18%
C	AVAST! FREE ANTIVIRUS	8.66%
D	AVG ANTIVIRUS FREE	7.92%
E	ESET NOD32 ANTIVIRUS	7.15%
F	KASPERSKY INTERNET SECURITY	4.31%
G	NORTON ANTIVIRUS	4.29%
H	AVG 10 [ANTIVIRUS]	3.68%
I	MCAFFEE VIRUSSCAN	3.02%
J	ESET SMART SECURITY	2.75%
K	COMODO ANTIVIRUS	2.74%
L	KASPERSKY ANTIVIRUS	1.95%
M	PANDA CLOUD ANTIVIRUS	1.63%
N	MCAFFEE VIRUSSCAN ENTERPRISE	1.40%
O	SYMANTEC ENDPOINT PROTECTION	1.39%
P	AVAST! INTERNET SECURITY	1.27%
Q	NORTON 360	1.22%
R	AVAST! ANTIVIRUS PROFESSIONAL	1.19%
S	EMSISOFT ANTIMALWARE	1.06%
T	AVIRA PREMIUM SECURITY SUITE	0.95%
U	PANDA ACTIVE SCAN 2.0	0.83%
V	OTHERS	21.75%



Windows Operating System Deployments

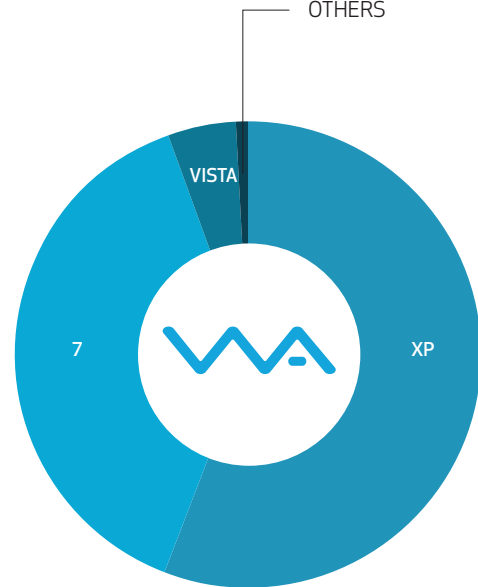
NORTH AMERICA JUNE 2011

WINDOWS XP	54.38%
WINDOWS 7	38.31%
WINDOWS VISTA	6.62%
OTHERS	<1.00%



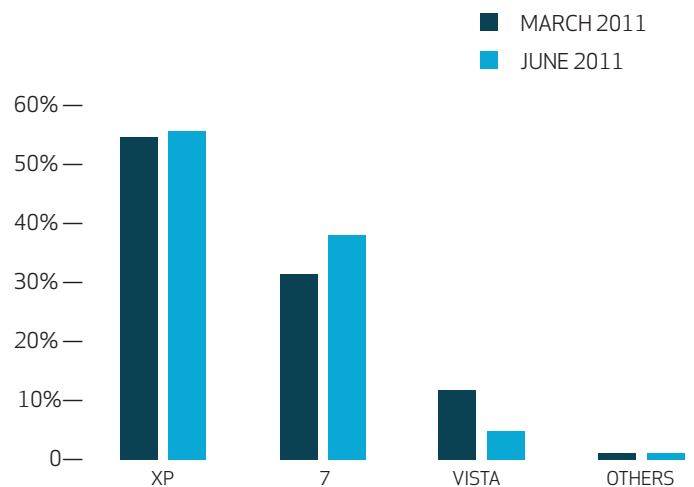
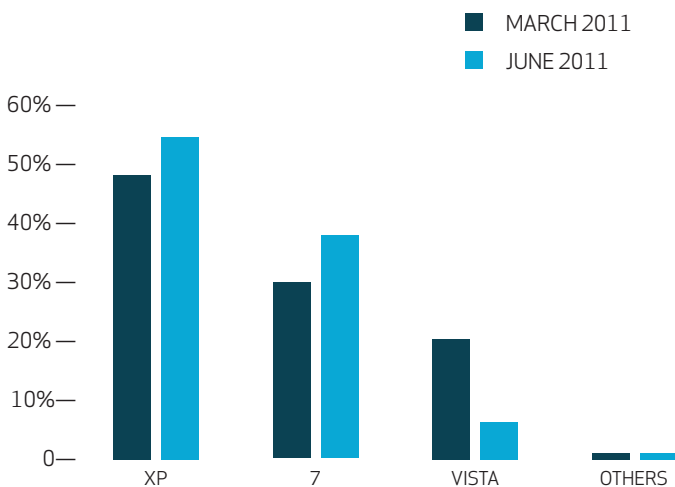
WORLDWIDE JUNE 2011

WINDOWS XP	55.84%
WINDOWS 7	38.81%
WINDOWS VISTA	4.72%
OTHERS	<1%



Windows 7 usage continues to gain in North America, with a 7% increase from OPSWAT's last report. Windows Vista showed a sharp decline from 20.31% to 6.62%, continuing the move away from Windows Vista towards Windows 7. Windows XP usage increased from our last report, regaining more than 6% to rise above 50%.

Worldwide usage of Windows XP grew this quarter as well, showing that it is still the dominant Windows Operating System. However, the upward trend of Windows 7 continues worldwide, as does the downward trend of Windows Vista. Only 4.72% of the computers that contributed data to this report had Windows Vista as their operating system.



Instant Messenger Market Share

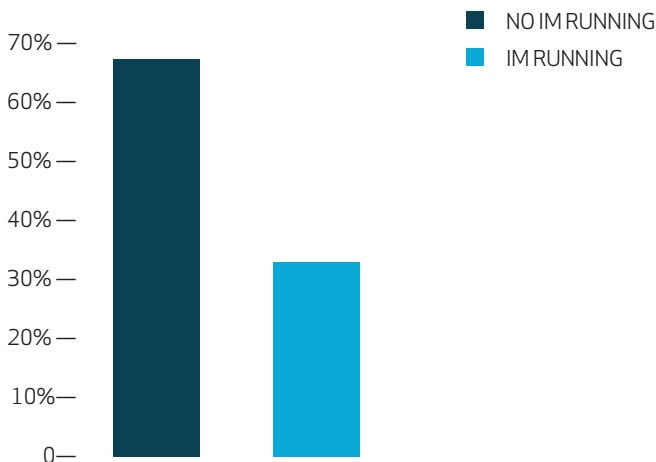
OPSWAT used both the detection capabilities of the OESIS Framework as well as registry information to determine the market share of well-known instant messaging (IM) applications. The market share by application is shown to the right. Windows Live Messenger accounts for just over 40% of the installed IM applications, followed by Skype, which accounts for more than a quarter of the installations. The share attributed to Google Talk includes both users with the Google Talk client installed and users with the video chat plug-in installed.

In addition to detecting whether an application is installed, the OESIS Framework can also report on various functions of supported applications, including whether the application is running. OPSWAT data shows that, of the computers in North America and Europe with supported IM applications installed, 32.65% had at least one running at the time of data collection.

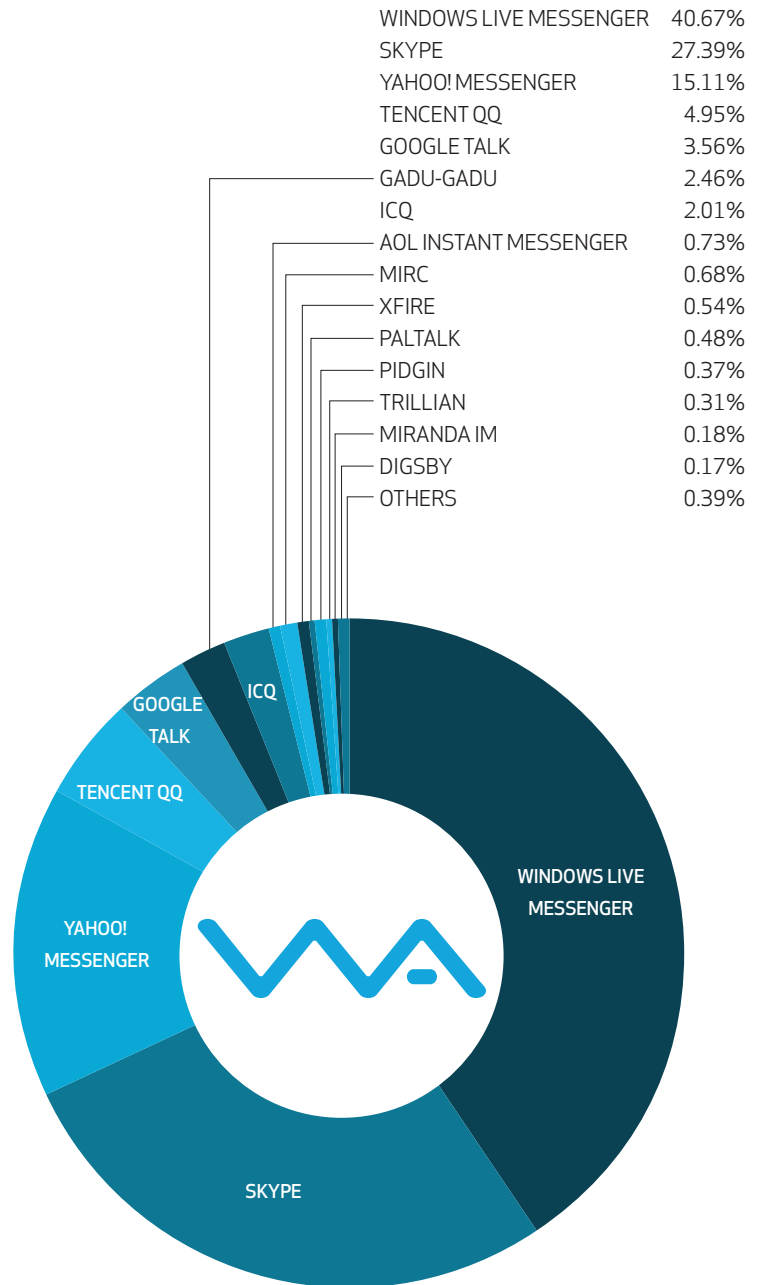
Conclusions

Three instant messenger clients dominate the market for PC users, with over 80% combined market share. This number does not account for the market share of web-based instant messaging services such as Google Chat and Facebook, which could mean that a higher percentage of PC users than reported actively use instant messaging.

INSTANT MESSENGER USAGE NORTH AMERICA AND EUROPE JUNE 2011



INSTANT MESSENGER MARKET SHARE WORLDWIDE JUNE 2011



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About OPSWAT

Founded in 2002, OPSWAT is the industry leader in software management SDKs, interoperability certification and multiple-engine scanning solutions. With both software manageability and multi-scanning products, OPSWAT offers simplified and comprehensive SDKs that reduce time and costs for your engineering and testing teams.

OPSWAT Certification

The OPSWAT Certification Program is a free interoperability program designed to enable technology partnerships between independent software vendors and leading network and technology solution vendors, by verifying that their security applications will work seamlessly with solutions employing the OESIS Framework. Additional information is available at www.opswat.com/certified.



Products

OESIS

OESIS Framework is a cross platform, open development framework that enables software engineers and technology vendors to develop products that detect, classify and manage thousands of third-party software applications. OESIS is perfect for SSL VPN, network access control (NAC) and other manageability solutions, and is deployed on an estimated 100 million endpoints worldwide.

Metascan

Metascan enables IT professionals and software engineers to enhance network security by integrating multi-scanning technology into their proprietary solutions. Metascan includes licenses for multiple built-in antivirus engines from market leaders such as CA, ESET, AVG and others, and allows for integration with other engines of your choice if needed. Using multiple engines significantly improves the likelihood of detecting malware, as your solution will be secure if any of the included engines detects the threat.

MD4SA

Powered by five anti-malware engines, MetaDefender for Secure Access (MD4SA) enables fast multi-scanning of endpoints for key loggers, viruses and other malware. Available as either a cloud service or hosted software package, MD4SA is ideal for quickly scanning endpoints' running processes and memory prior to a network, web or server login. A demo built using MD4SA technology is available at www.opswat.com/products/metadefender-for-secure-access.

MDTA

MetaDefender Threat Analyzer (MDTA) is an automated static file analysis solution used to analyze files and detect the presence of malicious applications by using dozens of tightly integrated antivirus engines. A free, online demo using MDTA technology is available at www.filterbit.com.

MD4M

MetaDefender for Media (MD4M) is the ideal solution to protect your organization from risks associated with infected media present on peripheral devices such as USB drives and CDs/DVDs. MD4M scans your media using up to nine licensed antivirus engines simultaneously, enhancing content security with multi-scanning technology.

AppRemover

The free AppRemover utility enables the thorough uninstallation of security applications like antivirus and antispyware from your computer. AppRemover is available for commercial licensing if you wish to deploy multiple copies of AppRemover within an organization or entity, or if you wish to bundle AppRemover with hardware, software or other services. More information is available at www.appremover.com.

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