

# Endpoint Security Trends

To better secure their growing attack surface, IT and security teams are thinking differently about endpoint security platforms. Native, operating system-level endpoint security controls are challenging standalone vendors. As Microsoft gains ground, buyers are pressed to find cost savings through platform providers, with opportunities emerging for supplemental solutions that close gaps. As advanced threats push security controls to their limits, SOC teams are struggling to detect and respond, and the XDR movement has promised to address this issue. This ESG research study sought to gain insights into these and other endpoint security trends.

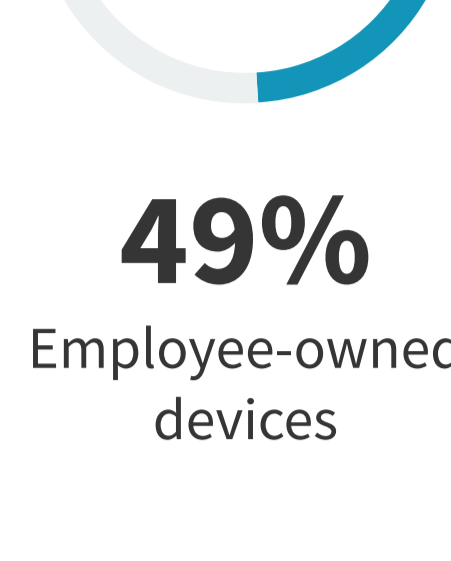
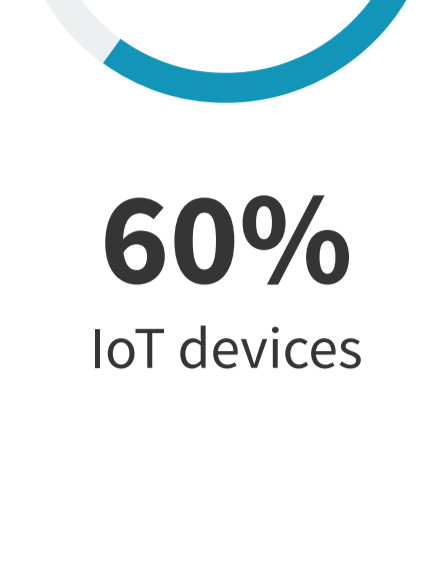
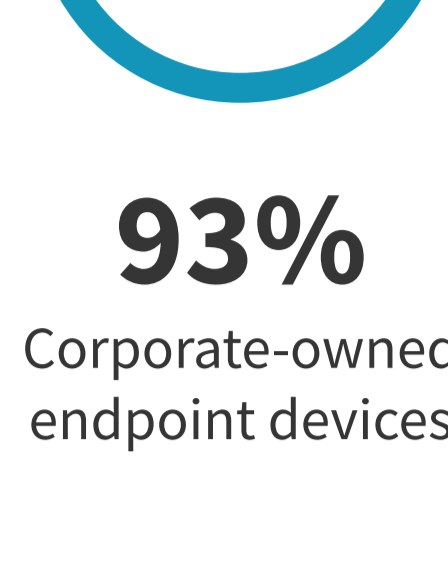
## An Expanding Market

New endpoint security opportunities are largely tied to IoT devices.

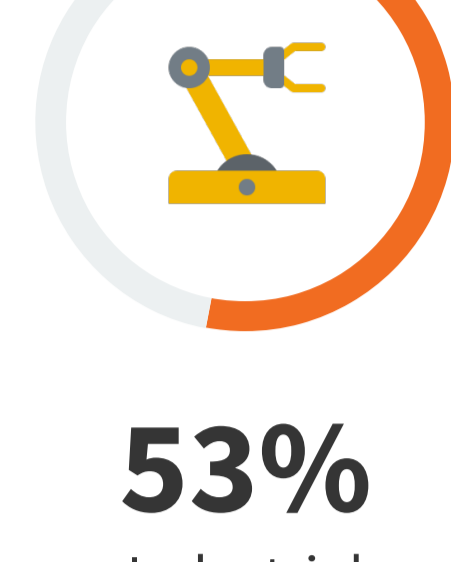
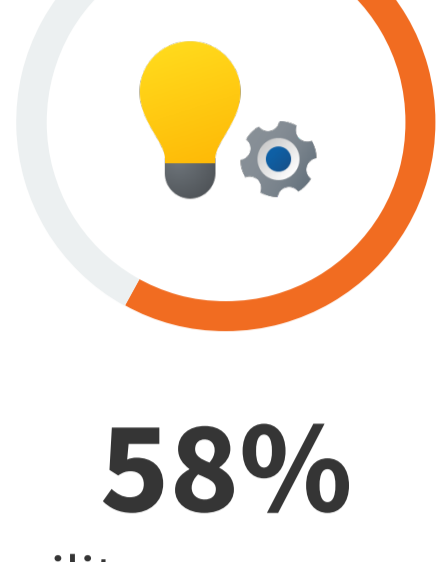
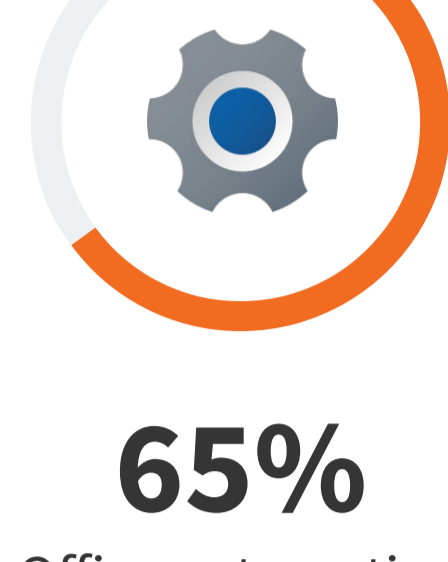
**“More than half now expect mobile device protection to be included within their endpoint security platform.”**

- Dave Gruber, Senior Analyst

### Devices currently protected by endpoint device security solutions.



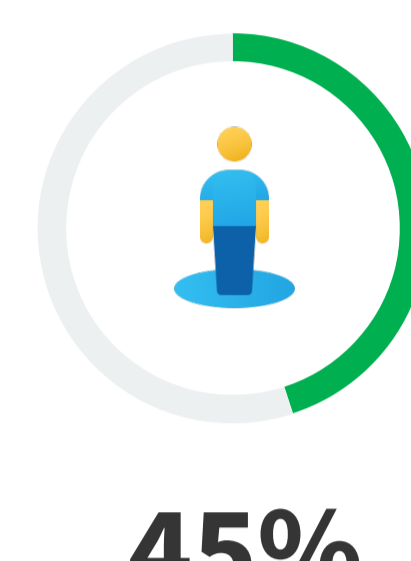
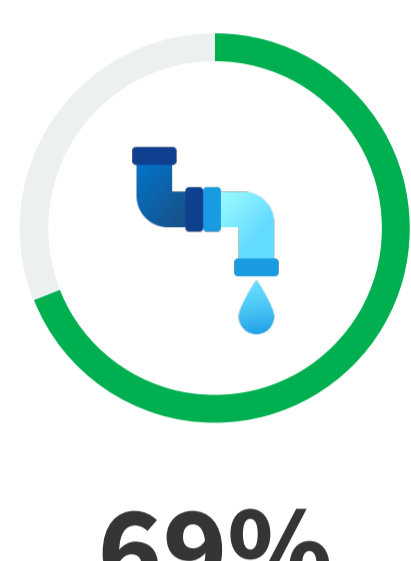
### Desired IoT device type support.



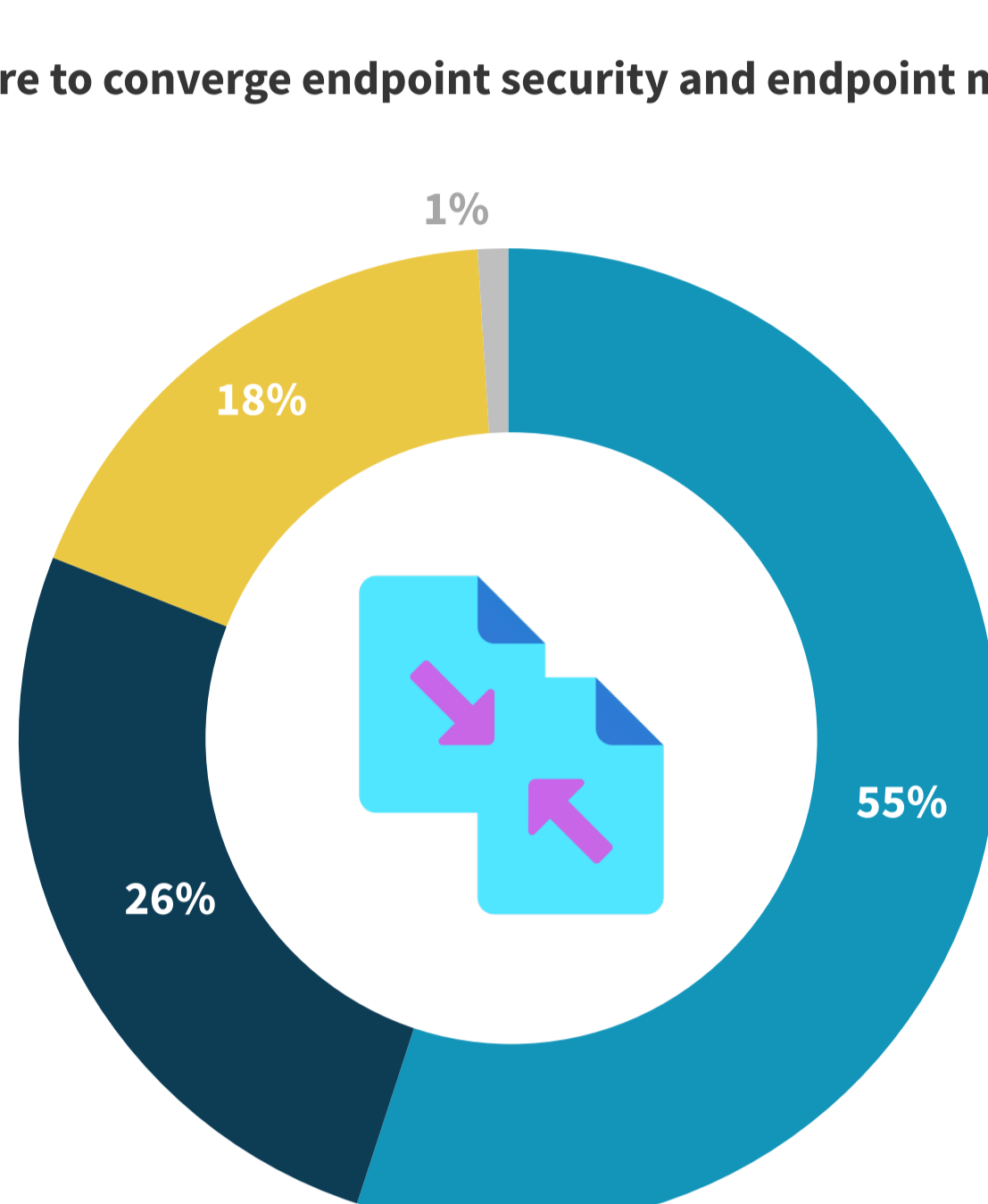
## Buyers Want More from Endpoint Security Platforms

DLP and endpoint management are converging with endpoint security.

### Use cases for securing local endpoint data with endpoint security solutions.



### Desire to converge endpoint security and endpoint management solutions.

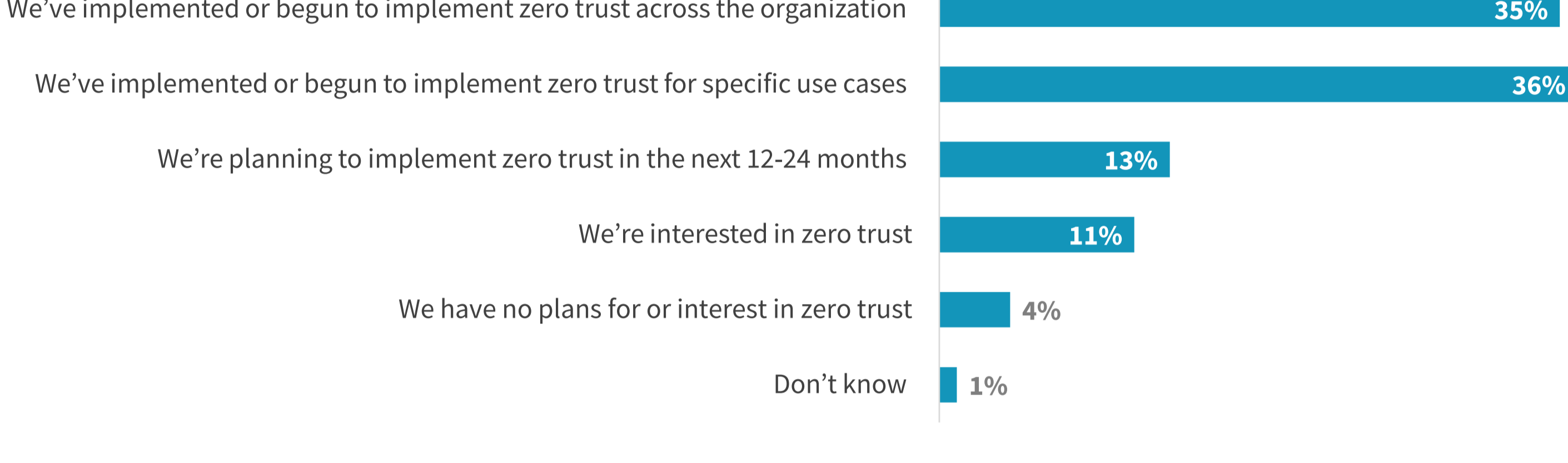


- These capabilities align with endpoint security and would therefore fit nicely
- These capabilities are misaligned with endpoint security and would therefore not fit in
- I could see value in converging these capabilities, but see barriers in doing so that would prevent us from utilizing an integrated solution
- Don't know

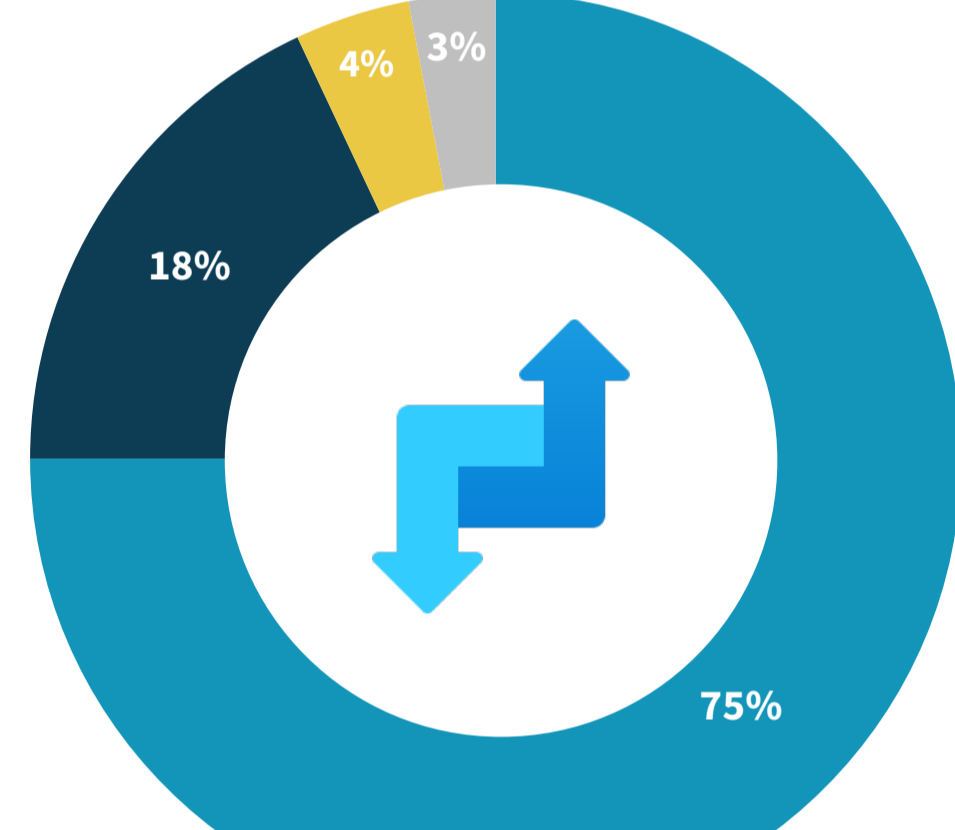
## Megatrends Are Driving Change

Zero trust and XDR initiatives are causing many to upgrade endpoint security.

### State of zero trust strategies.



### Willingness to swap out endpoint security in support of zero trust strategies.



- Yes, we have an active project underway to upgrade our endpoint security in support of our zero trust strategy
- Yes, this is something we are considering, but don't have an active zero trust project underway
- No, we don't consider endpoint security as part of our zero trust strategy
- Don't know

**“As organizations consider XDR, 45% think XDR will either immediately or within 12 months replace their EDR solutions.”**

- Dave Gruber, Senior Analyst

## EDR Vendors Are Preferred for XDR

Most think their current EDR provider can deliver XDR.

**“84% report that they will give their EDR vendor the first shot at providing an upgrade from EDR to XDR.”**

- Dave Gruber, Senior Analyst

### Plans for procuring an XDR solution from the EDR provider.



**56%** are currently evaluating their EDR provider's XDR offering.

## Native Endpoint OS Security Is Gaining Mindshare

Microsoft is now a serious contender for most, threatening incumbent solutions.

### Perceived weaknesses with native endpoint OS security controls.

We see gaps in native controls and will therefore be considering the use of third-party endpoint security controls in addition to native controls, 22%



We don't see any gaps, and therefore plan to utilize only native controls in the next 12-18 months, 25%

Although we see gaps, we believe native controls will meet our current needs, 49%

### Current position on how Microsoft Defender will likely fit into future endpoint security strategies.



**37%** We are currently utilizing Microsoft Defender as our primary endpoint security solution

**25%** We have an active project underway to evaluate Microsoft Defender as our primary endpoint security solution

**This is a significant uptick** from ESG research just two years ago, when 56% said they thought Microsoft could be a contender sometime in the future.

## Endpoint Security Change Continues

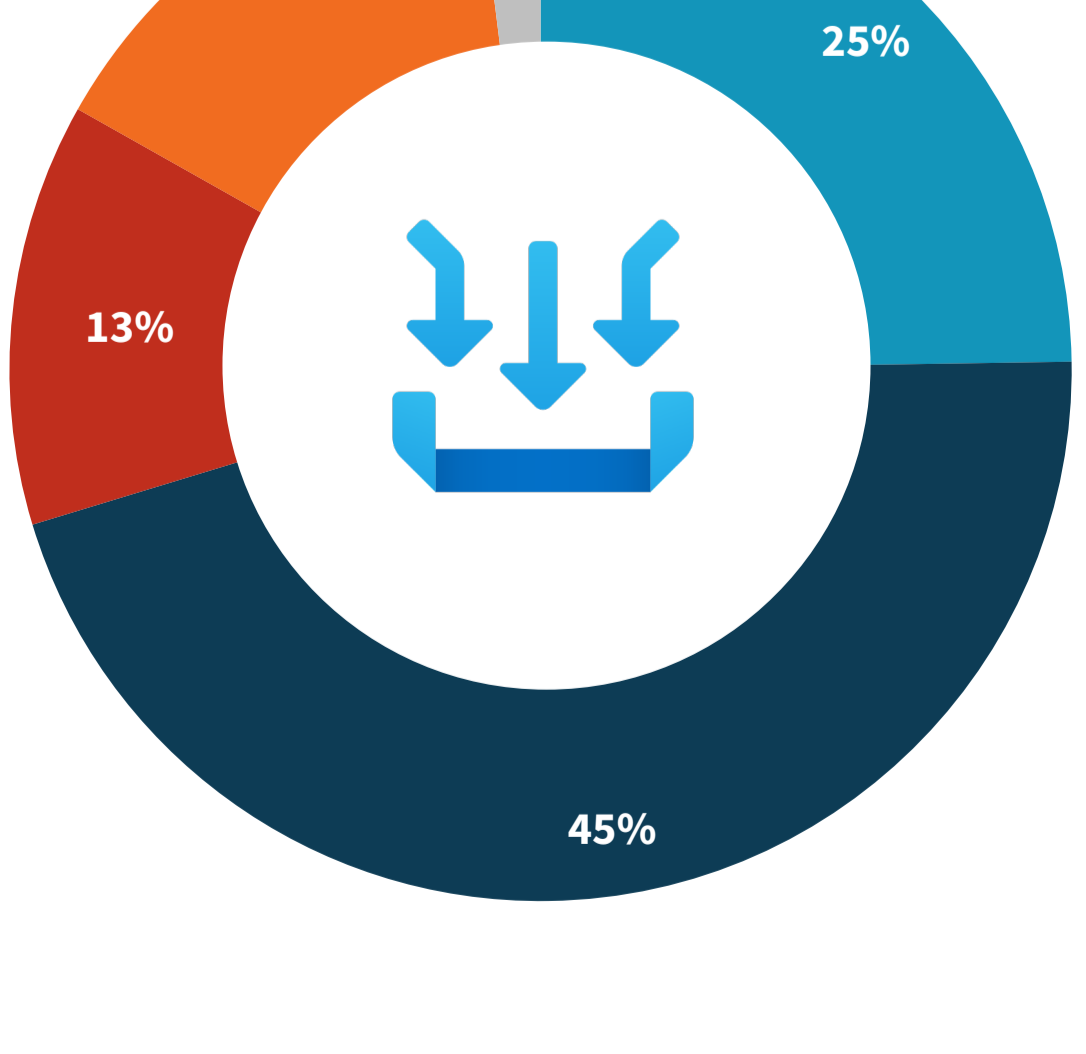
Spending is up, and a majority plan to change out current endpoint security solutions.

### Expected change in endpoint security spending.



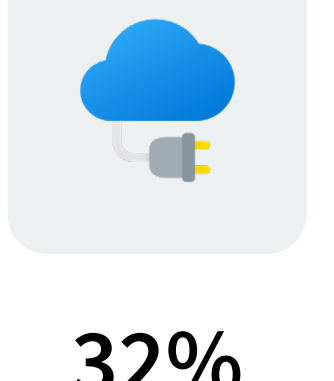
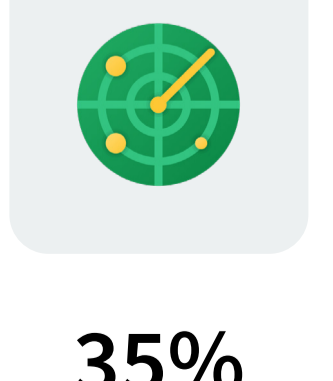
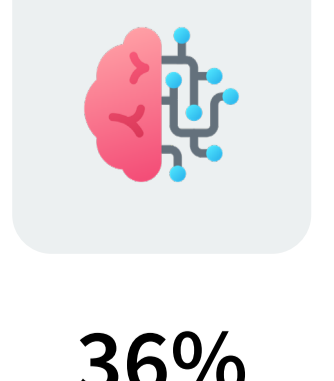
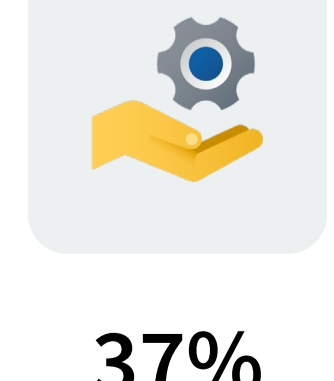
**75%** of organizations will increase spending on endpoint security in the coming 12 months.

### Plans to replace current endpoint security solution(s) with a consolidated endpoint security platform.



- We recently replaced our endpoint security solution(s) with a consolidated endpoint security platform
- We are actively investigating consolidated endpoint security platforms
- We plan to start a project to replace our current endpoint security solution(s) with a consolidated endpoint security platform within the next 12-18 months
- We have no plans to replace our endpoint security solution(s) in the foreseeable future
- Don't know

### Top drivers to switch endpoint security vendors.



For more data and analysis from this ESG research study, as well as specific guidance for endpoint security vendors looking to invest in the future of their business, read the ESG Research Report, *Security Megatrends and Their Impact on Endpoint Security*.

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