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WHITE PAPER

Overview of The 2023 Gartner® Market Guide for Email Security

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**Learn Key Takeaways and
Email Security Market
Trends** Deemed Most
Important To Monitor in
2023 by Gartner Analysts.

Gartner®

Trustifi is Named in the Gartner 2023
Email Security Market Guide.

Gartner® recognized Trustifi as a Representative Vendor for its Outbound Shield, Inbound Shield, and Email Account Compromise Detection solution in the 2023 Gartner Market Guide for Email Security*

Cloud Migration Top of Mind In the Gartner Market Guide

Gartner's 2023 email security market guide shows growth in organizations moving to cloud-based email security solutions to leverage additional scale and security protection capabilities. Gartner's latest market analysis states, "by 2025, 20% of anti-phishing solutions will be delivered by API integration within the email platform, up from last than 5% today."



Gartner reported that 70% of organizations have migrated to cloud-based email solutions. This cloud adoption allows faster enablement of cloud-based email security services.

Key Market Indicators

Gartner expects the Cloud Based Email Security Software Market to grow at a CAGR of 8.68% by 2027. Factors such as a need for decreasing onsite data center footprints and cost savings, coupled with increasing incidences of spam, are spurring the market growth.

The migration to the cloud gives organizations access to more security services:

- Adaptive Artificial Intelligence and Machine Learning
- Multi-factor authentication Integration into Zero-Trust Architectures
- More Observability of Security Telemetry Embedded with XDR Solutions

Legacy email security platforms still dependent on MX record changes, inline appliances, and other complex deployments are being replaced with cloud-based email security platforms much faster. Organizations dealing with next-generation email phishing attacks, BEC, and identity theft are migrating to cloud-based solutions with additional innovative security protection capabilities easily enabled by a single console.

They can integrate these advanced capabilities of adaptive AI with a managed security orchestration and automation response(MSOAR) service hosted in the cloud.

Market Definition

Email security scope continues to change with the times. Inside the Gartner 2023 market guide for email security, the analyst describes email security as including:

- Predictive Security
- Preventive Security
- EDR and XDR Framework Integration
- Ease-of-Management
- Sound and Proven Operations Model



Description of the Market

Gartner continues to extend their description in 2023 to incorporate additional expected layers of adaptive control well-beyond inbound and outbound protection.

In the 2023 Gartner guide, in other the spam protection, malware protection, and attachment protection against phishing and BEC, Gartner also is expecting email security teams will look to incorporate more DLP, email encryption, data tokenization, and domain authentication into the comprehensive email security protection strategy.

Gartner defines three solution categories, expecting each focus area to deliver the latest security controls to their product capabilities. Their product groups include

- **Secure Email Gateway (SEG)** - A traditional gateway solution requiring an MX record change to point their Microsoft Exchange record to the SEG.
- **Integrated Cloud Email Security (ICES)** - A integrated email security offer embedded with Microsoft O365 and Google providing basic and advanced protection capabilities.
- **Email Data Protection (EDP)** - Considered a critical addition to the ICES solutions, EDP delivers advanced email encryption, data tokenization, and DLP functionality through a cloud-based platform via API.

2023 Email Security Focus and Direction



Similar to the 2022 Gartner email market guide, ransomware challenges many organizations. 40% of ransomware started with a phishing email. The email channels, including Microsoft O365 and Google, continue to struggle to stop ransomware even with ICES-embedded services.

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Spanning Email Security Protection Beyond the Inbox

Gartner reported in 2023 that protecting email communications extends into the many collaboration platforms, including LinkedIn, Microsoft Teams, and Slack. Gartner is looking at cloud-based API email security solutions that offer comprehensive protection for this attack surface. Slack, LinkedIn, and Microsoft are under attack by hackers because of the value of data and video content. Embedded in these collaboration platforms are email and chat messages containing organizational content.

Maturity of AI and ML Email Security Solutions

Many ICES and EDP email security providers have developed and deployed AI and ML capabilities for years. Gartner observed in the 2023 report, "Traditional SEG vendors, however, have only recently announced a cloud-based ICES offering with AI." This recent announcement speaks to having a mature and proven AI and ML strategy for email security far beyond the SEG market.

With a continued focus on inbound and outbound protection being the cornerstone of email security, AI and ML combined with DLP, data tokenization, and encryption to meet compliance and privacy mandates remain a struggle for many organizations using SEG or ICES-only security solutions.

Gartner calls out the increase in email encryption for all organizations. However, in the 2023 report, Gartner reports, "less than 40% of organizations have enabled an email encryption." Newer offerings in the cloud-based email security market have made messaging encryption much easier for users and administrators to manage.

Microsoft and Google Continued Investment in Basic Email Security

Gartner reported in the 2023 email security reporting that Google and Microsoft continue to develop and license basic email security capabilities. Microsoft continued to add security features to its already complex E5 licensing plan. Microsoft online protection (MOP) and Microsoft Defender for Office365 are critical components for their extended detection and response(XDR) strategy, similar to Cisco, CrowdStrike, and other security vendors.

Microsoft's investment in cybersecurity continues to help drive innovation into its solutions. Specifically, Microsoft Defender continues to show promise in endpoint security. However, the results are mixed if this solution will help reduce the effects of email-borne attacks.

Google continues innovating its primary email security offerings embedded with its workspace licensing. The company's advancements in AI for security in time will bring a new level of anti-spam and anti-phishing defense.



Extending Additional Messaging Security into O365 and Google Workspace

ICES providers continue to develop closer integration with Microsoft O365 and Google workspaces through APIs extending their AI and ML capabilities further into these email platforms to include more account takeover expanded behavior analysis, including location and authentication data will provide additional attack detection and alert.

Other to becoming content-aware, ICES solutions continue to roll out MSOAR capabilities. Managed service providers offering SOAR capabilities can now access APIs within Microsoft O365 and Google to automate incident responses to protect email boxes better and extend collaboration applications.



Source: Gartner, "Market Guide for Email Security," Ravisha Chugh, Peter Firstbrook, Franz Hinner, 13 February 2023. GARTNER is a registered trademark and service mark of Gartner, Inc. and its affiliates in the U.S. and internationally and is used herein with permission. All rights reserved.



2023 Trustifi Key Innovations

Trustifi continues to capture market share in the cloud-based email security solution space by delivering a platform optimized to align with client needs with advanced features through a single console. Along with offering world-class inbound shield protection for anti-spam, anti-phish, and anti-malware, Trustifi innovations provide even more protection options integrated into the management console. Like their compliance enablement workflow, they can enable all features with a "single click."

With several innovations delivered in early 2023, Trustifi continues to set the bar for the email security market for features including

Trustifi Integration with Zero-Trust Edge Security

Trustifi added integration with several critical SAML/SSO partners, including OKTA, OneLogin, and others, to better align with the organization's zero-trust authentication and isolation strategy. ZTE will help manage the access to the Trustifi administrative through secure authentication and policy-based routes.

SPF Record Checker

The Trustifi SPF Record Checker queries DNS for the correct domain names to retrieve the SPF DNS TXT records. Many SPF record checkers can also check the DMARC data for a specific domain using the latest SPF standard specifications.

Deep Integration into O365 and Google Workspaces

They automatically send secure emails and comply with easily enabled Data Classification and Loss Prevention rules. Implementation takes minutes with automated integrations for Microsoft Office 365, Exchange on-premise, and Google Workspace.

Enabling the Trustifi Plug-in for Spanish-Speaking Clients

Trustifi announces the launching a new Spanish language plug-in module for its best-in-class email security solution, including the Inbound Shield, Data Loss Prevention, and Email Encryption product portfolio.

The plug-in concurrently displays translations of all text and instruction involved in using the Trustifi solutions into Spanish, allowing speakers of both languages to use the software efficiently.

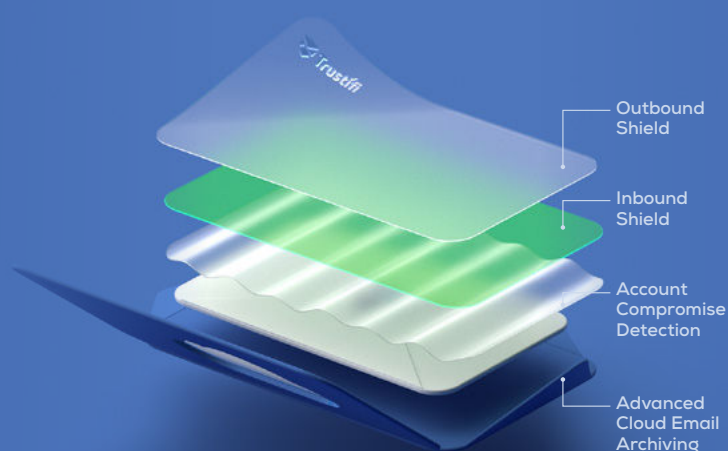
Trustifi Data Tokenization Integration into the Email DLP Strategy

Email security platforms supporting Data Loss Prevention by encrypting outbound messages now have an additional weapon to combat the ever-changing threat landscape.

Tokenization by Trustifi allows a recipient to see your entire email, just like any other email, right from their inbox without having to decrypt or go through any additional steps.

Trustifi Strategy

Holistic, Consolidate, and Optimize



With Trustifi vendor consolidation and reduction of resource cost allocation, they align with the needs of small and midsize clients while not compromising on email protection, all with a single pricing model.



Outbound Shield

- Email Encryption and Recipient Multi Factor Authentication
- Data Loss Prevention and Email Data Exfiltration
- One-Click Compliance™



Inbound Shield

- AI engines to keep inbox clean
- Advanced Threat Protection
- Phishing and BEC Protection
- Stop SPAM and Gray Mail



Account Compromise Detection

- Instantaneously Identify Accounts that Have Been Compromised
- Automatically Block Access to Compromised Accounts



Advanced Cloud Email Archiving

- A cloud-based secure and convenient way to access emails
- Define controls and permissions to monitor and record user's activities
- Easily share data, cases and queries

The most valuable asset to any organization, other than its employees, is the data in its email—and Trustifi's fundamental aim is keeping clients' data, reputation, and brand safe from all threats related to email, with Trustifi's Inbound Shield, Data Loss Prevention, Data Tokenization, and Email Encryption.

With Trustifi vendor consolidation and reduction of resource cost allocation, they align with the needs of small and midsize clients while not compromising on email protection, all with a single pricing model.



Awards and media features have acknowledged Trustifi's solutions from prestigious sources such as Expert Insights, CRN magazine, SourceForge, the American Business Association, the Golden Bridge Awards, and Channel Visions magazine

As a global cybersecurity provider of inbound and outbound email protection, Trustifi currently supports customers from countries including the USA, Canada, Brazil, the Dominican Republic, the UK, the Netherlands, India, the UAE, China, Japan, Cyprus, the Philippines, and more. The company has also developed "One-Click Compliance" capabilities that cater to world security regulations, including PDPO for Hong Kong, POPI for South Africa, GDPR for Europe, and LGPD for Brazil.



*Gartner, "Market Guide for Email Security," Ravisha Chugh, Peter Firstbrook, Franz Hinner, 13 February 2023. GARTNER is a registered trademark and service mark of Gartner, Inc. and its affiliates in the U.S. and internationally and is used herein with permission. All rights reserved. Gartner does not endorse any vendor, product, or service depicted in its research publications and does not advise technology users to select only those vendors with the highest ratings or other designations. Gartner's research publications consist of the opinions of Gartner's research organization and should not be construed as statements of fact. Gartner disclaims all warranties, expressed or implied, concerning this research, including any warranties of merchantability or fitness for a particular purpose.