

# The Forrester Wave™: Data Loss Prevention Suites, Q4 2016

## Tools And Technology: The Data Security And Privacy Playbook

by Heidi Shey

November 8, 2016

### Why Read This Report

In our 30-criteria evaluation of data loss prevention suite providers, we identified the seven most significant ones — Clearswift, DeviceLock, Digital Guardian, Forcepoint, GTB Technologies, Intel Security, and Symantec — and researched, analyzed, and scored them. This report shows how each provider measures up and helps security and risk (S&R) professionals make the right choice.

### Key Takeaways

#### **Symantec, Digital Guardian, And Forcepoint Lead The Pack**

Forrester's research uncovered a market in which Symantec, Digital Guardian, and Forcepoint lead the pack. Intel Security, GTB Technologies, and Clearswift offer competitive options. DeviceLock lags behind.

#### **S&R Pros Are Looking For Robust, Consistent Data Protection Policy Enforcement**

The DLP suite market continues to grow because more S&R pros see DLP as a way to enforce policies for compliance, privacy, and intellectual property (IP) protection. This market growth is largely because DLP suites can provide DLP capabilities across all channels of data loss under a single console to apply consistent policies.

#### **IP Protection, Info Management, And Endpoint Visibility And Control Are Key Differentiators**

As DLP suites evolve, improved IP protection, information management, and endpoint visibility and control capabilities will dictate which providers will better meet changing enterprise demands. Capabilities such as inspection of encrypted data and traffic continue to be important. Vendors that can provide these capabilities will deliver a comprehensive data protection suite that goes beyond traditional DLP.

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by [Heidi Shey](#)

with [Stephanie Balaouras](#), [Alexander Spiliotes](#), and [Peggy Dostie](#)

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Forrester conducted product evaluations in September 2016 and interviewed seven major vendors of data loss prevention (DLP) suites: Clearswift, DeviceLock, Digital Guardian, Forcepoint, GTB Technologies, Intel Security, and Symantec.

## Related Research Documents

[Market Overview: Data Loss Prevention](#)

[Rethinking Data Loss Prevention With Forrester's DLP Maturity Grid](#)

[Vendor Landscape: Data Loss Prevention Solutions](#)

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Forrester Research, Inc., 60 Acorn Park Drive, Cambridge, MA 02140 USA  
+1 617-613-6000 | Fax: +1 617-613-5000 | [forrester.com](#)

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## Data Use And Handling Policies Require A Means To Enforce Them

Data use and handling policies for meeting regulatory compliance requirements, privacy requirements, and intellectual property protection are ineffective paper policies without a means to enforce them.<sup>1</sup> Forrester defines data loss prevention (DLP) as:

*A capability that detects and prevents violations to corporate policies regarding the use, storage, and transmission of sensitive data. Its purpose is to enforce policies to prevent unwanted dissemination of sensitive information.*

### DLP Suites Offer Enforcement, Comprehensive Data Loss Channel Coverage, And More

DLP suites are solutions that cover data at rest, in motion, and in use.<sup>2</sup> They address multiple channels of data loss (e.g., email, endpoint, network, cloud, mobile) and help to make centralized management of DLP policies a possibility. In addition to enforcing policies and preventing accidental data loss, these solutions are increasingly going beyond providing DLP capabilities and evolving into integrated security solutions that address prevention, insider threat detection, and response.

In 2015, 44% of North American and European enterprise decision-makers had implemented or were in the process of implementing comprehensive DLP solutions and suites, while an additional 15% indicated plans to expand an existing implementation and 19% had plans to implement over the next 12 months.<sup>3</sup> In 2016, 63% of North American and European enterprises had implemented or were implementing DLP solutions and suites.<sup>4</sup>

## DLP Suites Evaluation Overview

To assess the state of the DLP suites market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top DLP suite vendors. After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 16 criteria, which we grouped into three high-level buckets:

- › **Current offering.** This includes evaluation criteria for the vendor's coverage of data loss channels (email, network and web, cloud, endpoint, and mobile); capabilities specific for IP protection; failure modes; information management capabilities such as reporting, data discovery, data classification, and integration with information life-cycle technologies (e.g., eDiscovery or legal hold, records management or enterprise content management, enterprise/cognitive search, and rights management); incident management (escalation as well as case management), productivity (for end users as well as admins); encryption support; endpoint visibility and control; and other features such as languages supported, and employee and country privacy compliance capabilities.

- › **Strategy.** This includes evaluation criteria for the vendor's planned enhancements to the DLP suite; overall security portfolio vision; and customer satisfaction. Our assessment of customer satisfaction is derived from a combination of vendor customer reference interviews, a customer reference survey, and Forrester client inquiries and interactions throughout the year.
- › **Market presence.** This includes evaluation criteria for the vendor's installed base; financials; and staffing and related resources. Evaluation criteria for installed base assess the vendor's number of customers (as individual logos); global, industry, and enterprise presence; sales penetration; and deployment penetration.

### Evaluated Vendors And Inclusion Criteria

Forrester included seven vendors in the assessment: Clearswift, DeviceLock, Digital Guardian, Forcepoint, GTB Technologies, Intel Security, and Symantec. Each of these vendors has (see Figure 1):

- › **A DLP suite that addresses every channel of data loss.** This includes email, endpoint, network, web, and cloud, covering data in motion, in use, and at rest. All suites evaluated have DLP capabilities that inspect content and channel traffic, detect violations to corporate data-handling policies, and provide various options for remediating incidents.
- › **At least 300 customers (individual logos).** We used this limitation to ensure that the largest Forrester clients could have confidence that these providers had experience with the challenges that enterprises face today.
- › **A product version of the suite that is generally available prior to August 12, 2016.** We only evaluated suite capabilities that have been released and are generally available to the public by this cutoff date.

DLP suites are evolving beyond DLP and into integrated security solutions that address prevention, insider threat detection, and response.

**FIGURE 1** Evaluated Vendors: Suite Information And Selection Criteria

| Vendor           | Product name                              |
|------------------|---|
| Clearswift       | Aneesya Platform                          |
| DeviceLock       | DeviceLock DLP                            |
| Digital Guardian | Digital Guardian for Data Loss Prevention |
| Forcepoint       | Triton AP-DATA                            |
| GTB Technologies | Enterprise DLP that Works Platform        |
| Intel Security   | McAfee DLP                                |
| Symantec         | Symantec DLP                              |

**Vendor inclusion criteria**

Vendors must offer a DLP suite that addresses every channel of data loss (email, endpoint, network, web, cloud), covering data in motion, in use, and at rest. All suites evaluated have DLP capabilities that inspect content and channel traffic, detect violations to corporate data-handling policies, and provide various options for remediating incidents.

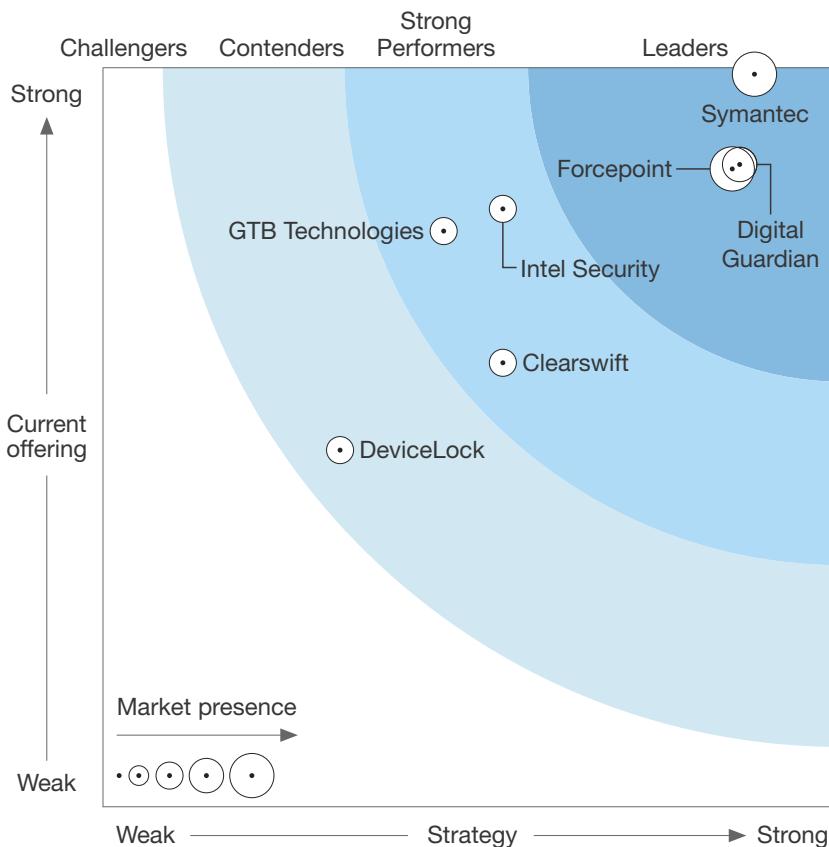
Vendors must have at least 300 customers (individual logos). We used this limitation to ensure that the largest Forrester clients could have confidence that these providers had experience with the challenges that enterprises face today.

The product version of the suite has been released and is generally available prior to August 12, 2016.

## Vendor Profiles

This evaluation of the DLP suite market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave™ Excel-based vendor comparison tool (see Figure 2).

FIGURE 2 Forrester Wave™: Data Loss Prevention Suites, Q4 '16



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Go to [Forrester.com](http://Forrester.com) to download the Forrester Wave tool for more detailed product evaluations, feature comparisons, and customizable rankings.

**The Forrester Wave™: Data Loss Prevention Suites, Q4 2016**

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**FIGURE 2** Forrester Wave™: Data Loss Prevention Suites, Q4 '16 (Cont.)

|                                  | Forrester's weighting | Clearswift | DeviceLock | Digital Guardian | Forcepoint | GTB Technologies | Intel Security | Symantec |
|----------------------------------|-----------------------|------------|------------|------------------|------------|------------------|----------------|----------|
| <b>Current offering</b>          | 50%                   | 3.00       | 2.41       | 4.34             | 4.31       | 3.89             | 4.04           | 4.95     |
| Coverage of data loss channels   | 15%                   | 2.40       | 3.30       | 4.10             | 3.45       | 3.25             | 3.70           | 4.85     |
| Intellectual property protection | 14%                   | 3.00       | 3.00       | 5.00             | 5.00       | 5.00             | 4.00           | 5.00     |
| Failure modes                    | 10%                   | 3.50       | 3.00       | 3.50             | 5.00       | 4.00             | 5.00           | 5.00     |
| Information management           | 10%                   | 2.15       | 2.25       | 3.50             | 5.00       | 4.40             | 4.10           | 5.00     |
| Incident management              | 10%                   | 3.50       | 1.50       | 4.50             | 4.50       | 4.00             | 5.00           | 5.00     |
| Productivity                     | 13%                   | 4.50       | 3.00       | 5.00             | 4.00       | 4.00             | 3.00           | 5.00     |
| Encryption                       | 10%                   | 4.00       | 0.50       | 5.00             | 4.50       | 3.50             | 4.50           | 5.00     |
| Endpoint visibility and control  | 10%                   | 1.00       | 2.00       | 4.00             | 3.00       | 3.00             | 3.00           | 5.00     |
| Other features                   | 8%                    | 2.70       | 2.30       | 4.00             | 4.70       | 3.60             | 4.70           | 4.70     |
| <b>Strategy</b>                  | 50%                   | 2.70       | 1.60       | 4.30             | 4.25       | 2.30             | 2.70           | 4.40     |
| Planned enhancements             | 30%                   | 3.00       | 1.00       | 5.00             | 5.00       | 2.00             | 3.00           | 4.00     |
| Security portfolio vision        | 40%                   | 3.00       | 1.00       | 4.00             | 5.00       | 2.00             | 3.00           | 5.00     |
| Cost                             | 0%                    |            |            |                  |            |                  |                |          |
| Customer satisfaction            | 30%                   | 2.00       | 3.00       | 4.00             | 2.50       | 3.00             | 2.00           | 4.00     |
| <b>Market presence</b>           | 0%                    | 2.42       | 2.28       | 3.18             | 4.18       | 2.30             | 2.62           | 4.68     |
| Installed base                   | 40%                   | 3.05       | 2.70       | 2.70             | 4.45       | 3.50             | 2.05           | 4.20     |
| Financials                       | 30%                   | 2.00       | 1.00       | 3.00             | 4.00       | 2.00             | 4.00           | 5.00     |
| Staffing and related resources   | 30%                   | 2.00       | 3.00       | 4.00             | 4.00       | 1.00             | 2.00           | 5.00     |

All scores are based on a scale of 0 (weak) to 5 (strong).

## Leaders Meet Tough Enterprise Requirements And Have A Strong Focus On Innovation

Leaders not only offered robust capabilities in their current offering today to meet the most stringent enterprise requirements, but also had strong forward-looking planned enhancements and an overall security portfolio vision that would help them meet future enterprise demands.

- › **Symantec.** Symantec provides a comprehensive DLP suite with robust capabilities for intellectual property protection, information management, incident management, and encryption support. It also offers a rich set of capabilities to help firms meet privacy requirements. Symantec has the most staffing and resources dedicated to DLP compared with other vendors evaluated in this Forrester Wave. Symantec continues to innovate in this space and has strong brand recognition in the DLP market.

While DLP may equate to Symantec (thanks to their acquisition of Vontu many years ago!) for many S&R pros, it's important to evaluate your needs and requirements to ensure that Symantec is a good fit from a technology and strategy perspective. Not everyone needs a supercar, especially if you're just using it to commute to work in rush hour traffic. Large enterprises and firms requiring advanced capabilities for intellectual property protection should consider Symantec.

- › **Digital Guardian.** Digital Guardian brings together two in-demand enterprise security capabilities today: DLP and endpoint visibility and control (EVC). A strong focus on strategic partnerships augments the company's information management capabilities. It also has a popular DLP-as-a-managed-service offering that now includes local UK and EU hosting options. This option also allows Digital Guardian to service small (e.g., as few as 10 seats) and mid-market firms, in addition to providing the option for enterprise.

Digital Guardian has the smallest customer base among the vendors evaluated in this Forrester Wave, and has room for improvement when it comes to developing capabilities for mobile DLP. It will continue to develop its platform to go beyond DLP and include focus on other areas like advanced threat protection. Firms that require DLP across Windows, Mac, and Linux OSes or have an interest in DLP-as-a-managed-service should consider Digital Guardian.

- › **Forcepoint.** Forcepoint brings together DLP, security analytics, and insider threat detection in its suite. The solution has a sleek UI dashboard, with the most impressive reporting capabilities compared with competitors evaluated in this Forrester Wave. Forcepoint captures and surfaces a wealth of information for security analysts and incident responders, including detailed risk scores, incident correlation, and capabilities like video playback of endpoint activity. Forcepoint also offers DLP as an embedded feature across a variety of standalone products as well as DLP-as-a-managed-service through strategic partners.

Forcepoint's language support is limited, with the admin UI available in English only. However, it does have strong localization capabilities for its endpoint-user-facing dialogs. Firms with sufficient resources and staff that are able to take full advantage of the suite's capabilities will benefit the

most from Forcepoint. Large enterprises, firms requiring robust capabilities for intellectual property protection and information management, and organizations with mature security programs should consider Forcepoint.

### **Strong Performers Have Well-Rounded Offerings With Distinctive Capabilities**

Strong Performers have robust capabilities in their current offering to meet core enterprise requirements for DLP. Each vendor has distinctive differentiators within its suite and capabilities offered that make it an ideal solution to address specific enterprise demands for DLP today, and an innovation strategy to help address capabilities for future demands.

- › **Intel Security.** Intel Security offers a full-featured DLP suite with robust capabilities for data discovery and classification, incident management, and encryption support. It provides a rich set of capabilities to help firms meet privacy requirements as well as protect intellectual property. Its training videos and user groups are also helpful resources. Intel Security collaborates with customers in helping them understand their data and policies before implementing technology controls for DLP, and recommends professional services for laying this foundation.

It's been an eventful couple of years for Intel Security!<sup>15</sup> It has room for improvement to fully realize its vision for DLP (an integrated system of endpoint security, data protection, cloud infrastructure security, and unified workflows) and is making investments to bring this to fruition. Enterprises looking for a well-rounded DLP suite to bundle in with other Intel Security solutions like encryption or endpoint security should consider Intel Security.

- › **GTB Technologies.** GTB Technologies offers a full-featured DLP suite in an easy-to-manage solution that is very price competitive. It has robust data discovery capabilities that allow for indexed searching across endpoints and is fully integrated with Seclore's information rights management solution. The language options for its admin UI and localization of user messages is the most comprehensive out of the vendors evaluated in this Forrester Wave.

While GTB Technologies has the least resources dedicated to staffing and sales compared with competitors evaluated in this Forrester Wave, its technology allows it to remotely support a large number of customers and prospects. Its solution is engineered to be simple to deploy, and help typically comes in the form of web meetings, screen sharing, and remote access. GTB Technologies has a client base ranging from SMBs to enterprises, with a large majority that Forrester would categorize as SMBs. Companies that require an easy-to-manage, well-rounded DLP suite that is focused on DLP should consider GTB Technologies.

- › **Clearswift.** Clearswift offers an easy-to-manage solution with a low administrative burden. Its suite has robust email DLP and encryption capabilities. Clearswift's bidirectional data redaction capability is also noteworthy. Clearswift's solution provides not just prevention against typical data loss use cases, but also sanitization of incoming data (an effective response against threats like ransomware).

From a data loss perspective, this structural sanitization capability is useful for removing document properties or active content from a spreadsheet — such as macros or scripts — that may be the underpinning of an analysis.

Clearswift's capabilities for information life-cycle and rights management and case management are less robust. While there is room for improvement in data discovery and classification, current capabilities are sufficient for typical enterprise use cases. Clearswift's customer base spans companies of all sizes. Firms that would benefit from bidirectional data redaction and require an easy-to-manage solution that doesn't interfere with employee productivity should consider Clearswift.

### Contender Meets Enterprise Requirements And Carves Out Strengths In Specific Areas

The Contender in this Forrester Wave has strong capabilities in its current offering to meet most enterprise requirements and robust capabilities in specific areas that would make an ideal fit for enterprises with those specific requirements. It has a deliberate approach and strategy that carves out its solution expertise and focus on areas separate from its competitors.

- › **DeviceLock.** DeviceLock provides an extremely scalable solution and lives up to its name, controlling movement of data to and from company laptops or desktops via a host of device types from phones to printers. In fact, DeviceLock's core focus has historically been device port control. It is also focused on setting customers up for success quickly through a variety of self-service resources (documentation, videos, web-based assistance, customer forum), making it an attractive option for firms that don't want to have to engage professional services to deploy DLP — and deploy quickly.

DeviceLock's capabilities for data classification, information life-cycle and rights management, incident management, and encryption support are less robust. Yet, these are typically requirements for large enterprises. DeviceLock's customer base is the most diverse of all the vendors evaluated in this Forrester Wave and includes SMBs as well as enterprises. Organizations in search of a DLP suite with a strong endpoint control focus should consider DeviceLock.

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## Supplemental Material

### Online Resource

The online version of Figure 2 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

### Data Sources Used In This Forrester Wave

Forrester used a combination of four data sources to assess the strengths and weaknesses of each solution. We evaluated the vendors participating in this Forrester Wave, in part, using materials that they provided to us by August 12, 2016.

- › **Vendor prequalification surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.

- › **Vendor Wave questionnaire.** Forrester evaluated the responses to a detailed questionnaire for each vendor as they relate to the Forrester Wave evaluation criteria.
- › **Product demos.** We asked vendors to conduct demonstrations of their products' functionality with guidance for specific capabilities for evaluation in order to evaluate each vendor and their suite on a level playing field. We used findings from these product demos to validate details of each vendor's product capabilities as described in their Forrester Wave questionnaire response, including the admin and user experience.
- › **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with three of each vendor's current customers.

### **The Forrester Wave Methodology**

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave evaluation — and then score the vendors based on a clearly defined scale. We intend these default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to <http://www.forrester.com/marketing/policies/forrester-wave-methodology.html>.

### **Integrity Policy**

We conduct all our research, including Forrester Wave evaluations, in accordance with our Integrity Policy. For more information, go to <http://www.forrester.com/marketing/policies/integrity-policy.html>.

## Endnotes

- <sup>1</sup> DLP tools help to enforce policies, but they are not magic. There are five key process stages for success. See the “[Rethinking Data Loss Prevention With Forrester's DLP Maturity Grid](#)” Forrester report.
- <sup>2</sup> This report highlights the different channels of data loss and examines the varied landscape of vendors offering DLP capabilities today as a feature, standalone solution, or suite. See the “[Vendor Landscape: Data Loss Prevention Solutions](#)” Forrester report.
- <sup>3</sup> This report examines the factors driving renewed interest in DLP, the state of DLP suite adoption, and the pros and cons of different approaches of bringing DLP capabilities into the enterprise. See the “[Market Overview: Data Loss Prevention](#)” Forrester report.
- <sup>4</sup> Source: Forrester's Global Business Technographics® Security Survey, 2016.
- <sup>5</sup> On September 7, 2016, Intel agreed to spin out Intel Security with a new, but old, name — McAfee. See the “[Quick Take: Intel Spins Off McAfee As Synergies Fail To Materialize](#)” Forrester report.

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