

**KEY TAKEAWAYS:****PRIORITIES AND FOCUS**

The top concern of respondents with visibility into company software decisions is data management / storage (31.5%), followed by email security (25.5%). Their projected priorities for 2019 look fairly-similar to their priority list for 2018. Respondents are fairly-evenly divided when it comes to whether they are prioritizing buying new software vs. implementing software they already bought / subscribed to. The feedback on what they would have said if we asked them the same question one year ago is virtually the same.

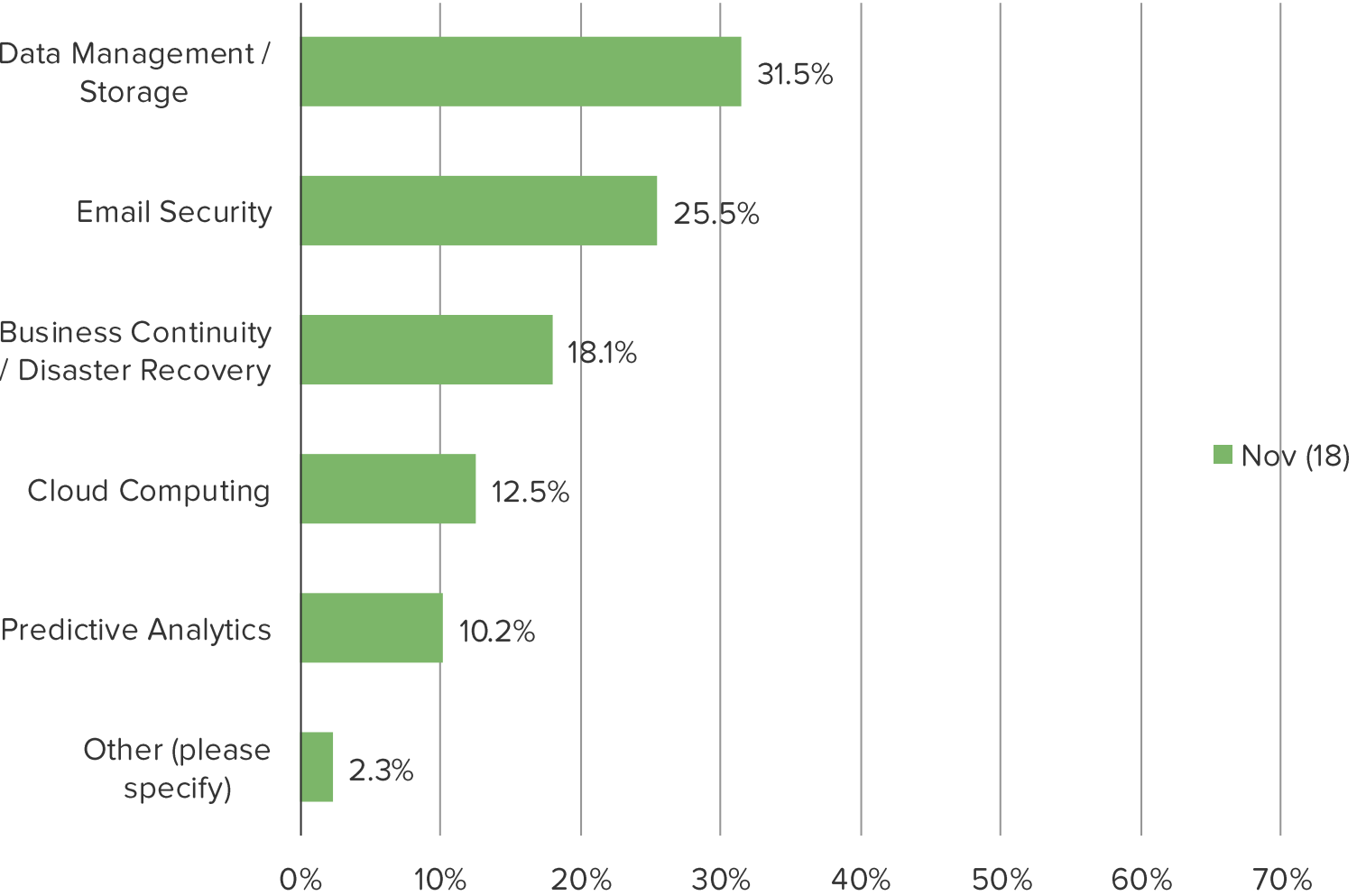
**EMAIL SECURITY SOFTWARE**

Among those who use email security software, Smarsh is the share leader (30.2%) closely followed by Proofpoint (29.6%) and then Edgewise (24.6%). The majority of users of each provider plan to renew at the end of their contract/subscription period (~80%-90%).

# SECURITY SOFTWARE

WHICH OF THE FOLLOWING WOULD YOU SAY HAS BEEN YOUR TOP PRIORITY FOR 2018?

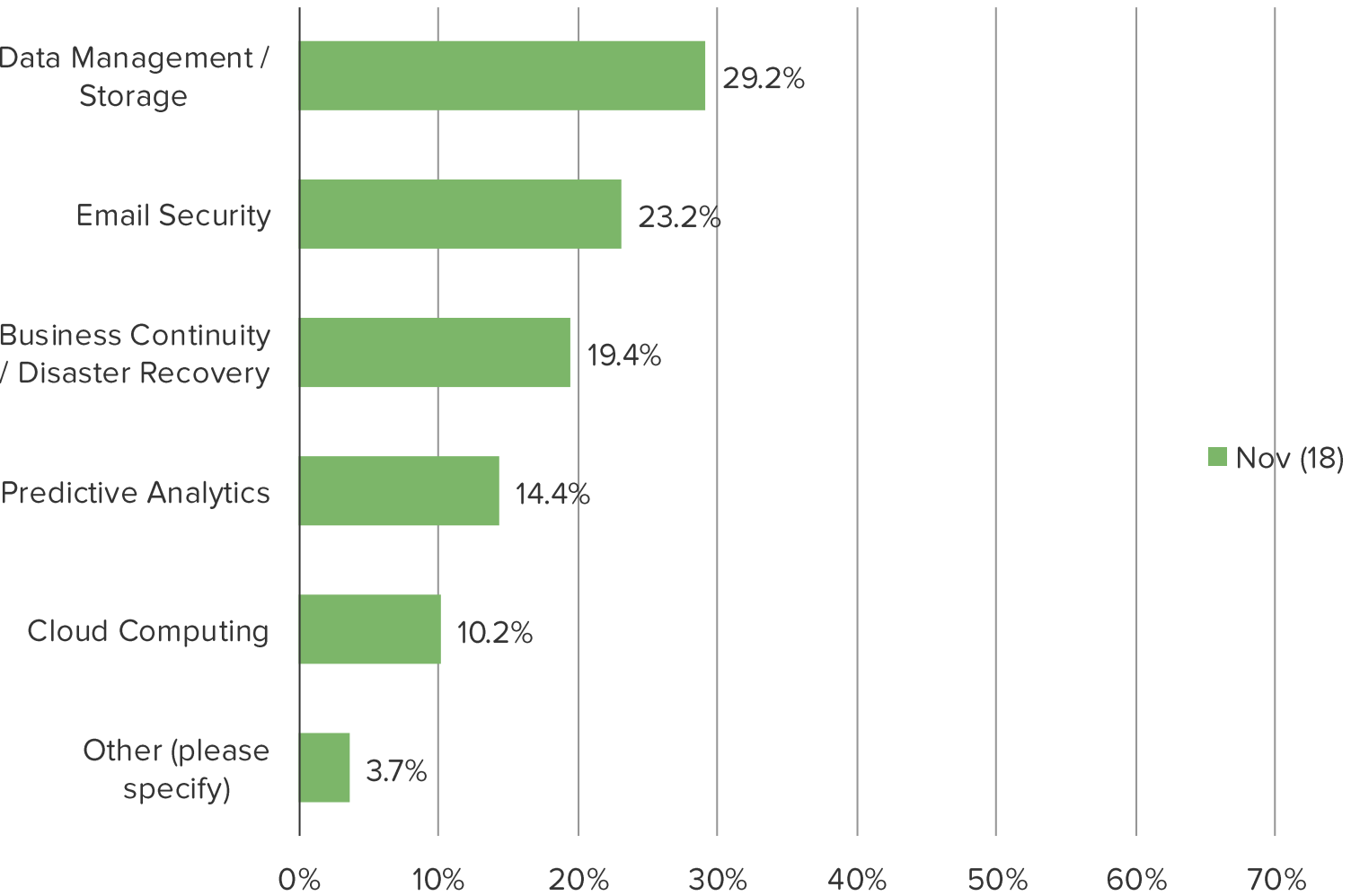
Posed to respondents who have visibility into software purchase decisions



\*n = 216

WHAT DO YOU EXPECT TO BE YOUR TOP PRIORITY IN 2019?

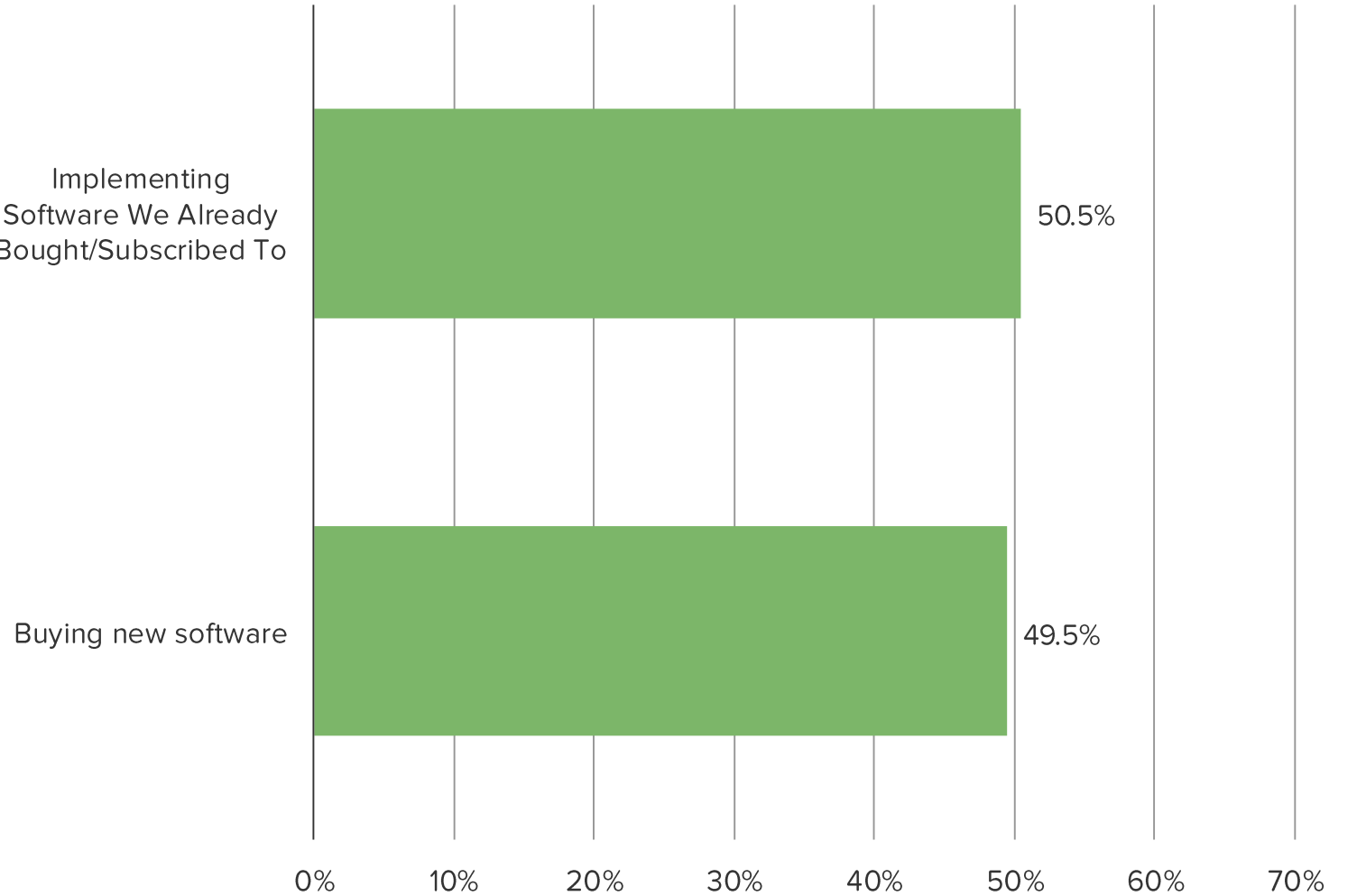
Posed to respondents who have visibility into software purchase decisions



\*n = 216

WHAT WOULD YOU SAY YOU ARE MORE FOCUSED ON RIGHT NOW?

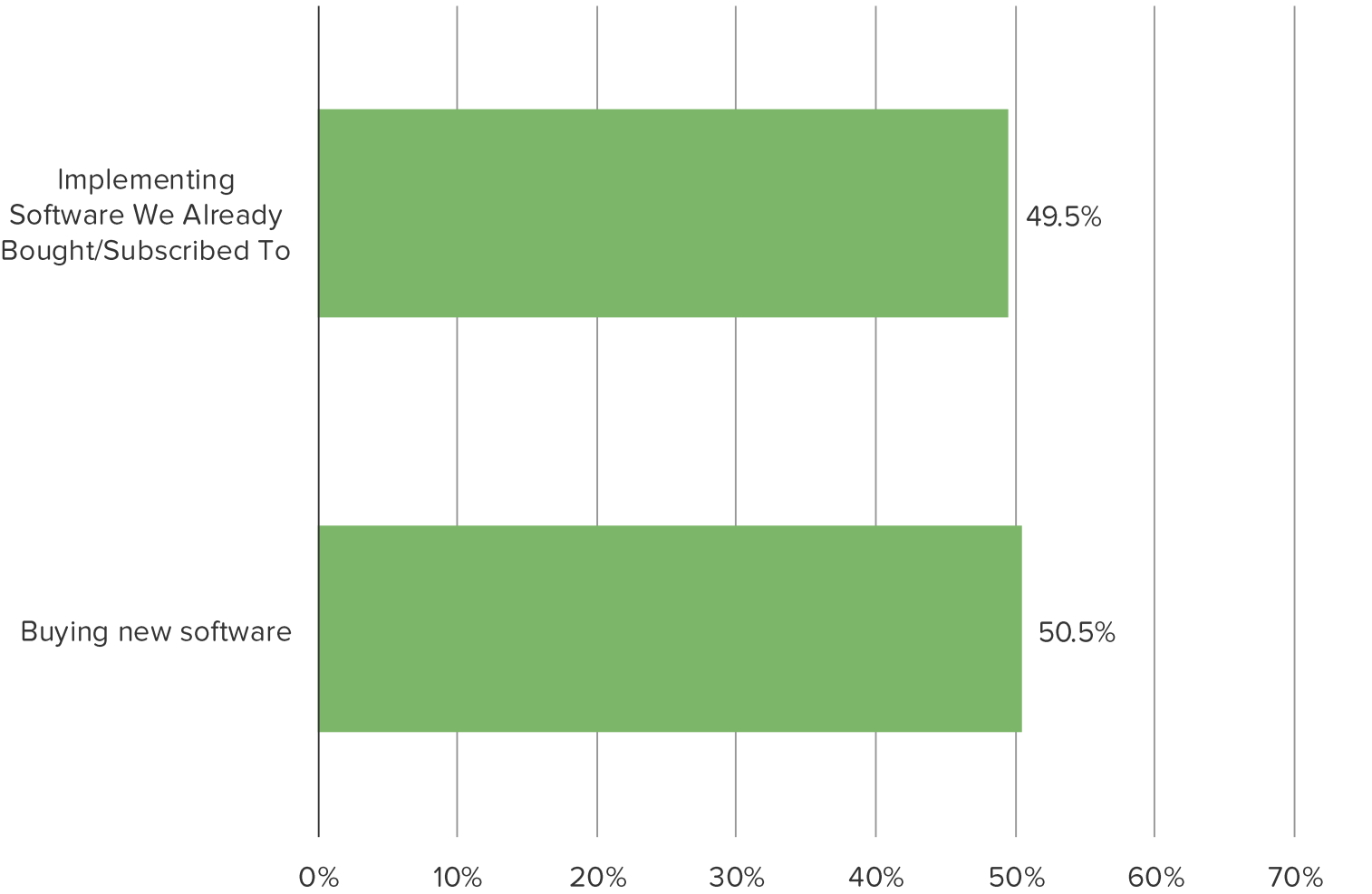
Posed to respondents who have visibility into software purchase decisions



\*n = 216

IF WE ASKED YOU THIS QUESTION A YEAR AGO, WHICH WOULD YOU HAVE SAID YOU WERE MORE FOCUSED ON AT THE TIME?

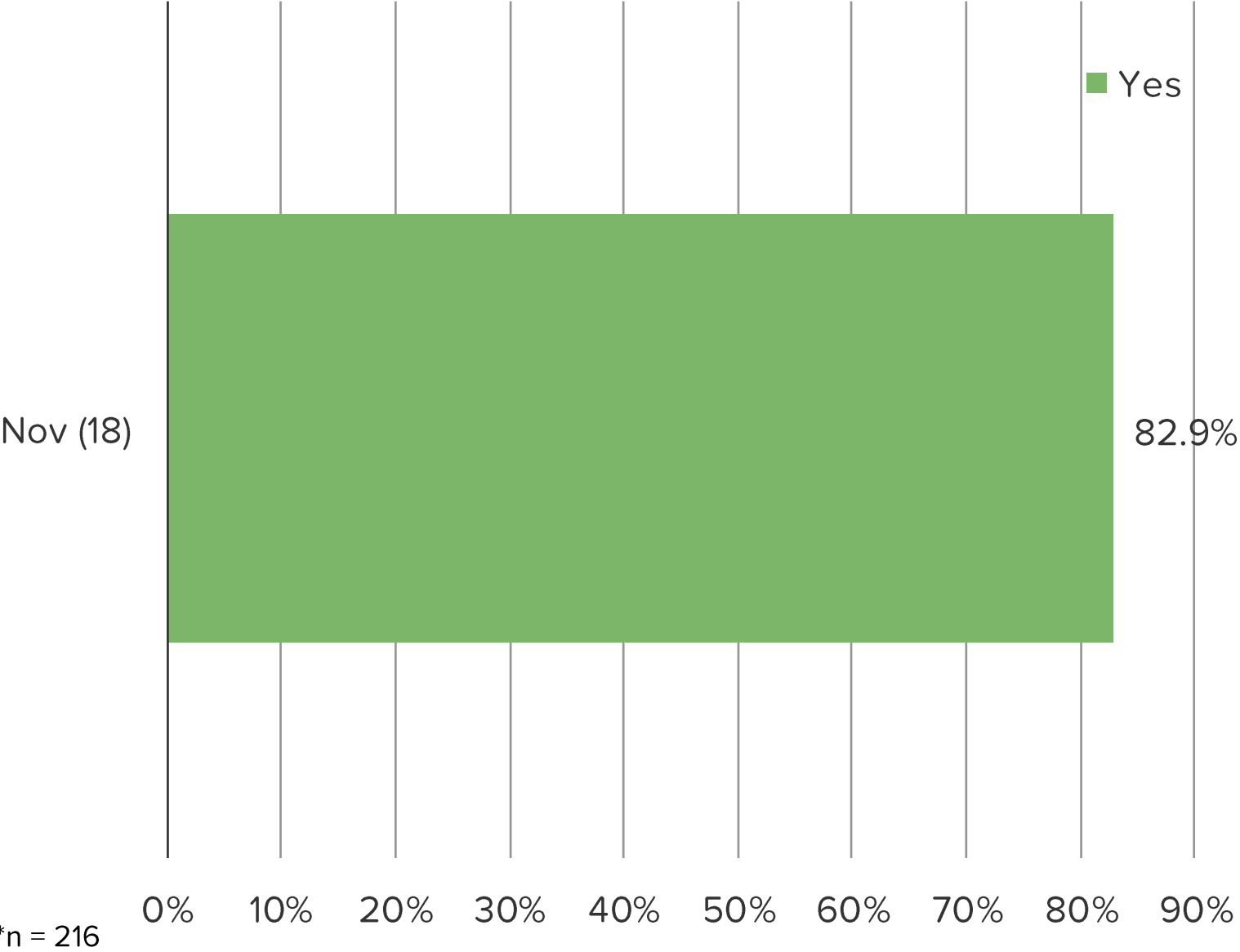
Posed to respondents who have visibility into software purchase decisions



\*n = 216

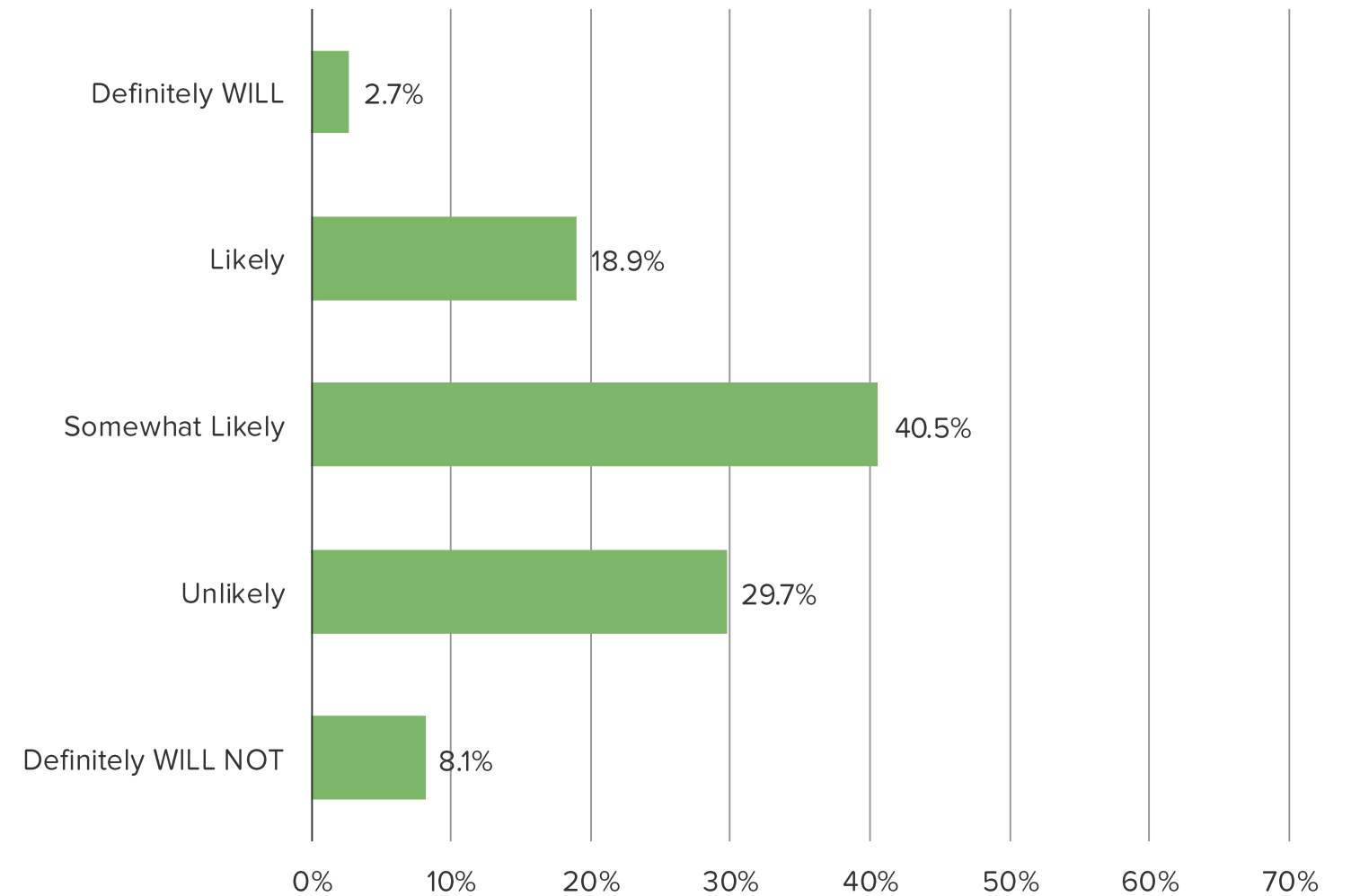
DOES YOUR COMPANY CURRENTLY USE EMAIL SECURITY/MANAGEMENT SOFTWARE APPLICATIONS?

Posed to respondents who have visibility into software purchase decisions



HOW LIKELY ARE YOU TO PAY TO ADD EMAIL SECURITY/MANAGEMENT APPLICATIONS IN THE NEXT YEAR?

Posed to respondents whose company DOES NOT currently use email security/management software applications

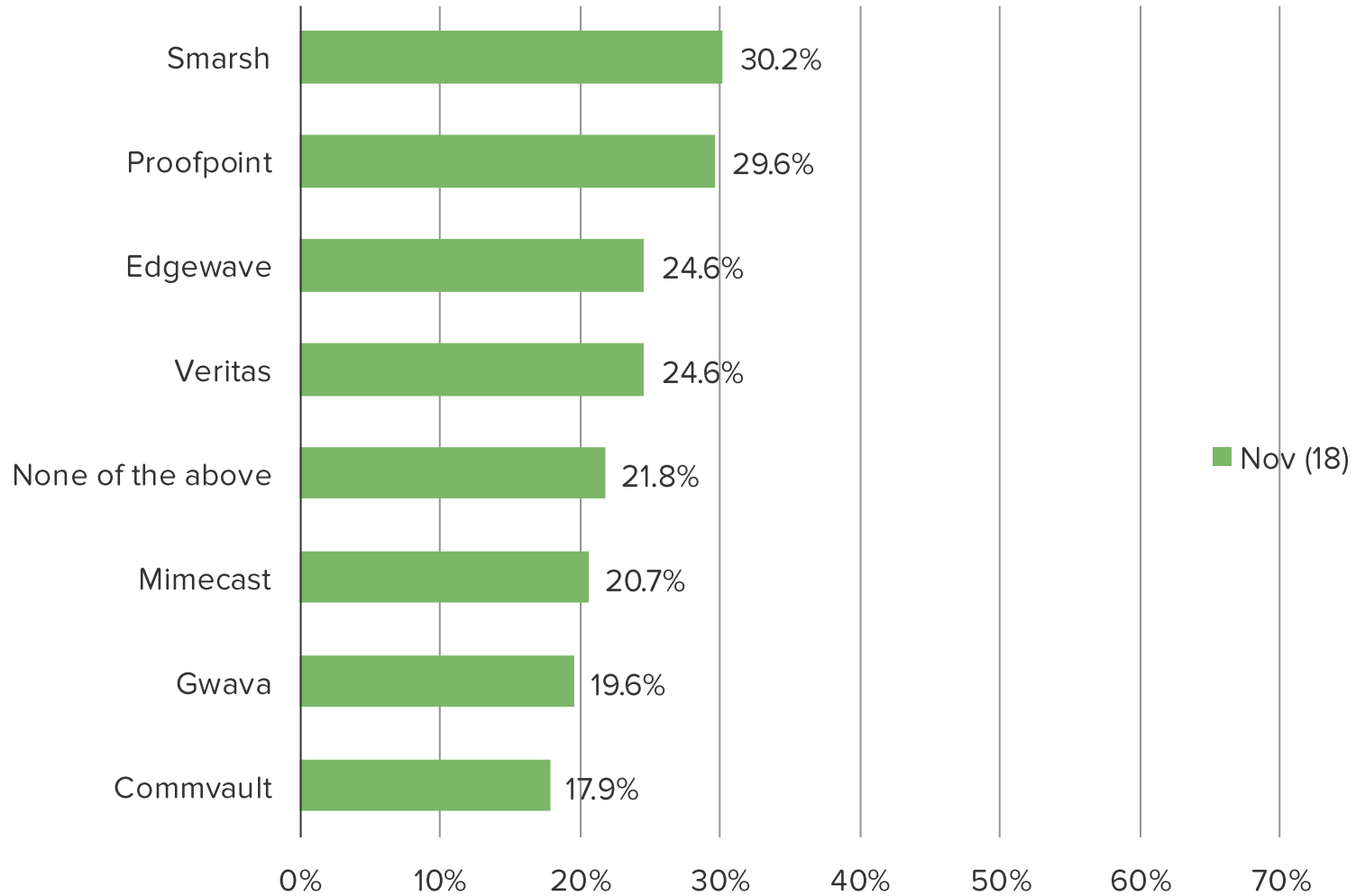


\*n = 37



DOES YOUR COMPANY CURRENTLY HAVE A CONTRACT/PAID RELATIONSHIP WITH ANY OF THE FOLLOWING? (SELECT ALL THAT APPLY)

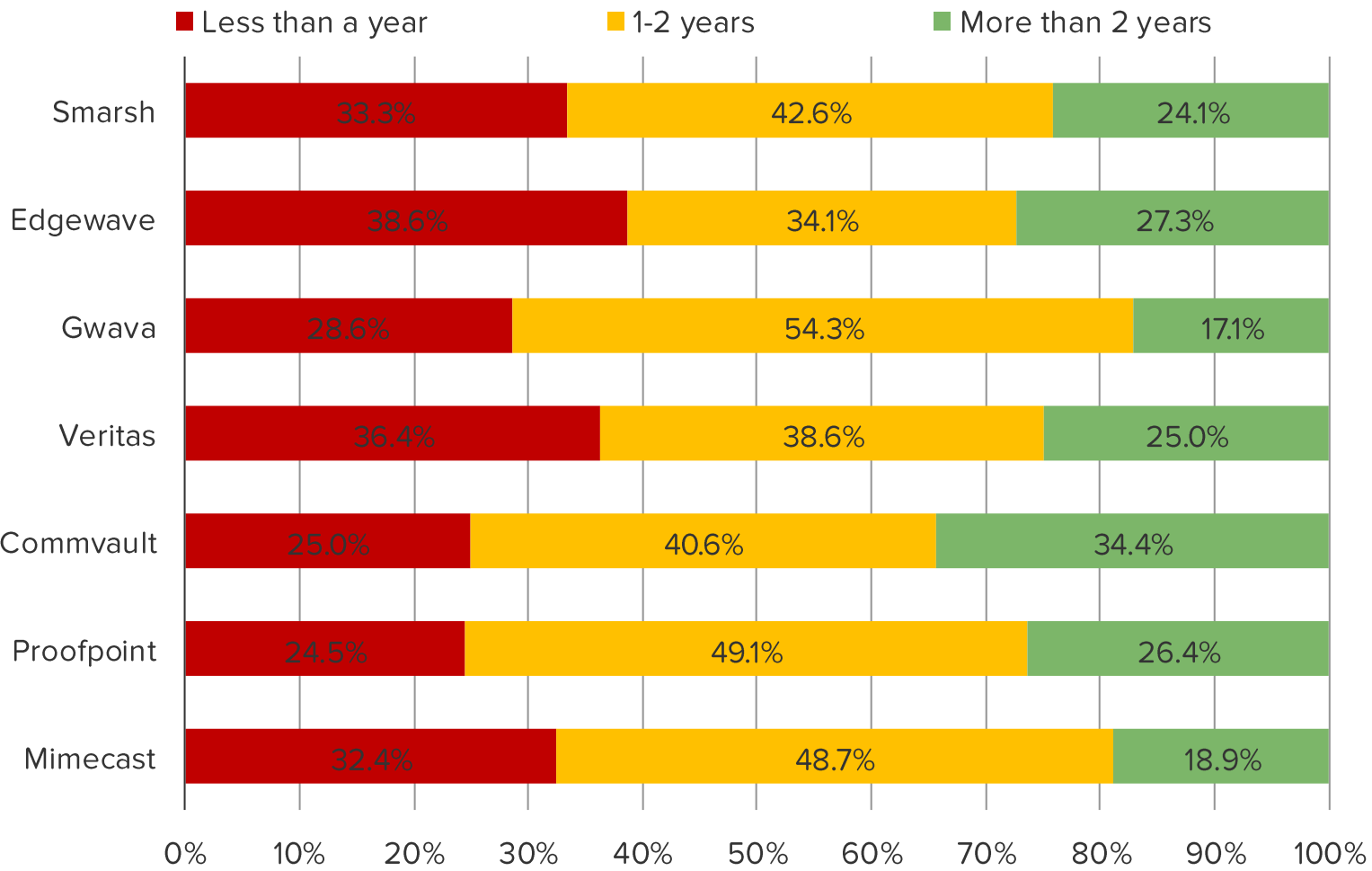
Posed to respondents whose company DOES currently use email security/management software applications



\*n = 179

FOR HOW LONG HAVE YOU BEEN USING THIS SOFTWARE?

Posed to respondents whose company has a contract/paid relationship with any of these email security/management applications



WHEN YOU GET TO THE END OF YOUR CONTRACT/SUBSCRIPTION PERIOD, WHAT DO YOU PLAN TO DO?

Posed to respondents whose company has a contract/paid relationship with any of these email security/management applications

