

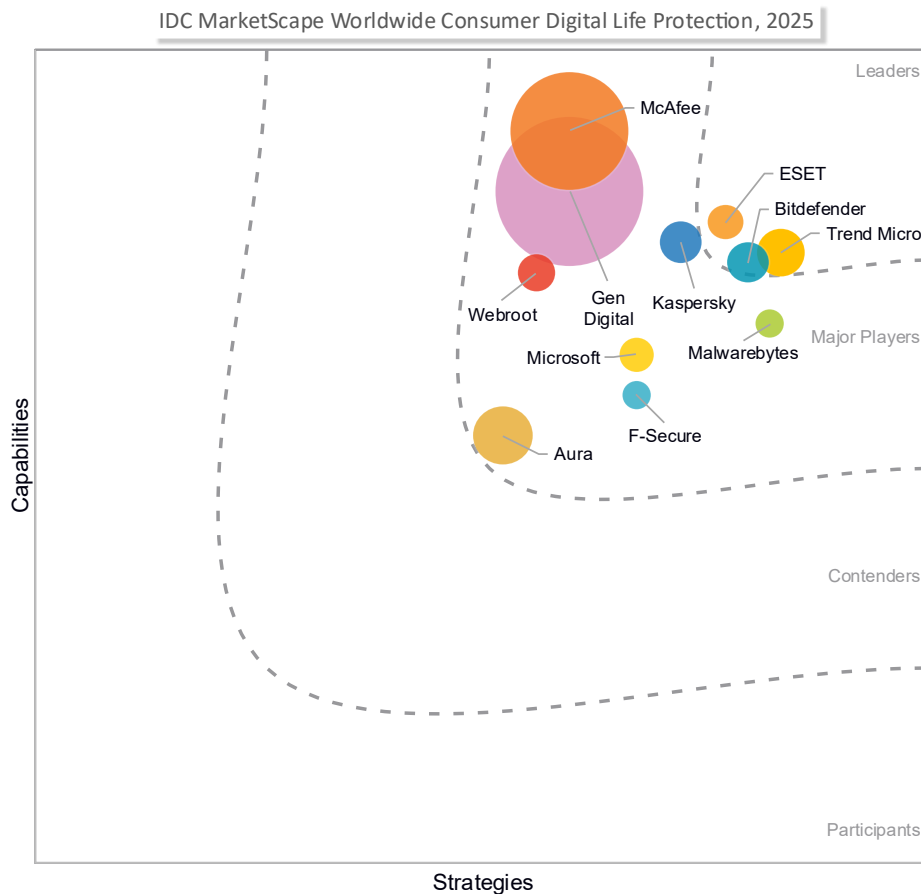
IDC MarketScape: Worldwide Consumer Digital Life Protection 2025 Vendor Assessment

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THIS EXCERPT FEATURES BITDEFENDER AS A LEADER
IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Consumer Digital Life Protection Vendor Assessment



Source: IDC, 2025

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Consumer Digital Life Protection 2025 Vendor Assessment (Doc # US52976725).

IDC OPINION

Traditionally, the consumer cybersecurity market was considered to be essentially a "done deal" with nothing much happening. In fact, it was primarily considered to be synonymous with antivirus and antimalware. For most consumers, solutions were often provided with new computers and users might or might not update those installations.

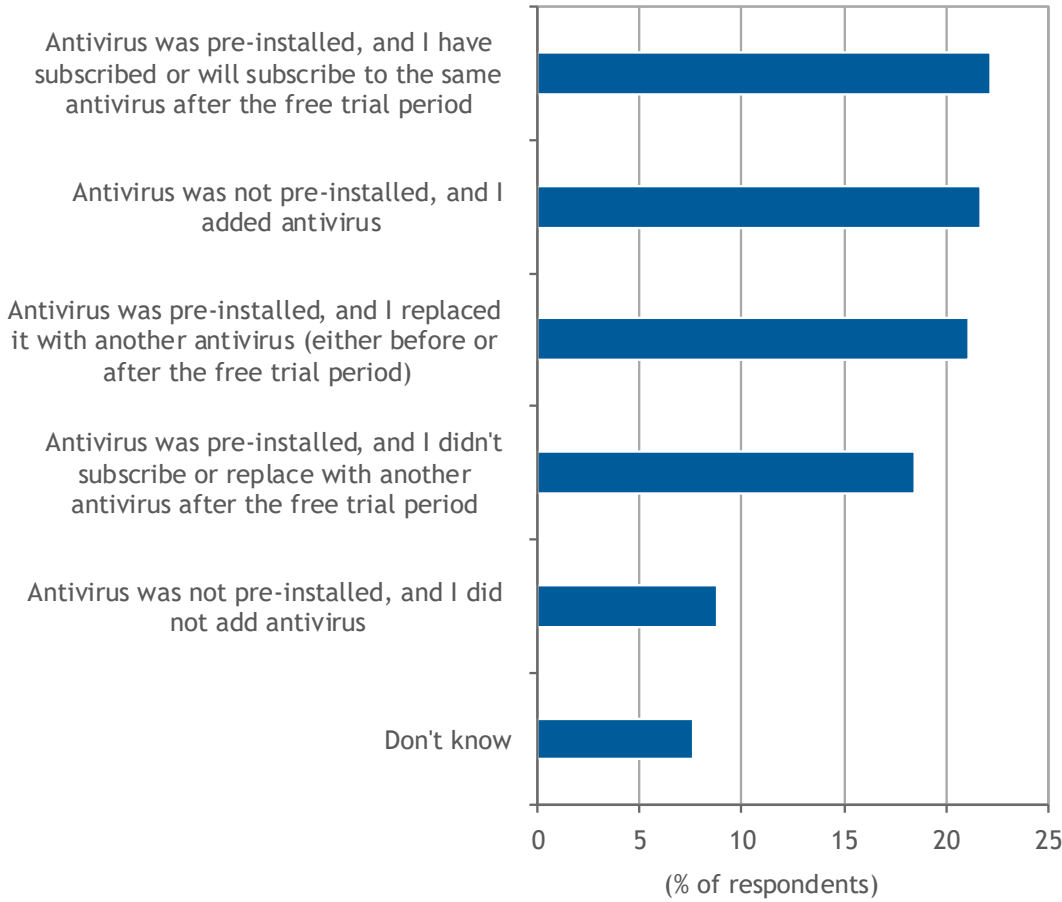
However, in the past decade, the consumer space has become markedly more complex with threat actors targeting user identity information, financial records, and other personal data. Increasingly, consumers have come to the realization that real harm can result if their online activities are compromised.

The increasing threat has impacted consumers' willingness to adopt more comprehensive cybersecurity tools and hygiene. As Figure 2 demonstrates, where consumers were once likely to simply depend on cybersecurity solutions that came with their computers, now they are equally likely to adopt third-party solutions outside of hardware acquisitions.

FIGURE 2

Consumer Methods for Obtaining Antivirus

Q. Regarding antivirus for your most recently purchased PC, which of the following applies?



Unweighted valid n = 855

Base = respondents who purchased more than 0 PCs (including laptops) for their household in the past two years

Notes:

This survey is managed by IDC's Global Primary Research Group.

Data is not weighted.

Use caution when interpreting small sample sizes.

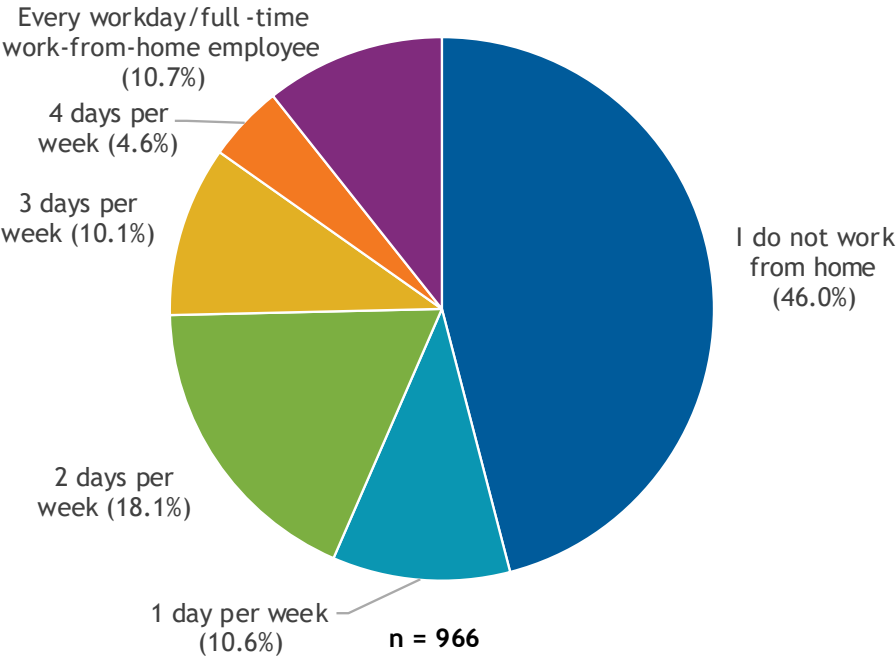
Source: IDC's *Consumer Digital Life Protection Survey*, February 2025

In addition, consumers' cybersecurity requirements have evolved beyond antivirus and antimalware to include privacy protection, parental controls, and data protection. This evolution of the consumer space is also complicated by the increasing adoption of remote work and distributed work requirements. Enterprises that used to depend on control of the endpoint to ensure corporate cybersecurity now must contend with employees whose work-at-home activities may not utilize the most capable cybersecurity protections. As a result, consumers that wish to work remotely are being forced to adopt endpoint protections that conform to enterprise standards. As Figure 3 illustrates, only 46% of those consumers surveyed indicate that they never work from home.

FIGURE 3

Consumer Days Worked from Home

Q. *How many days do you routinely work from your home?*



Base = respondents who indicated employees are employed full time or part time

Notes:

This survey is managed by IDC's Global Primary Research Group.

Data is not weighted.

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Source: IDC's *Consumer Digital Life Protection Survey*, February 2025

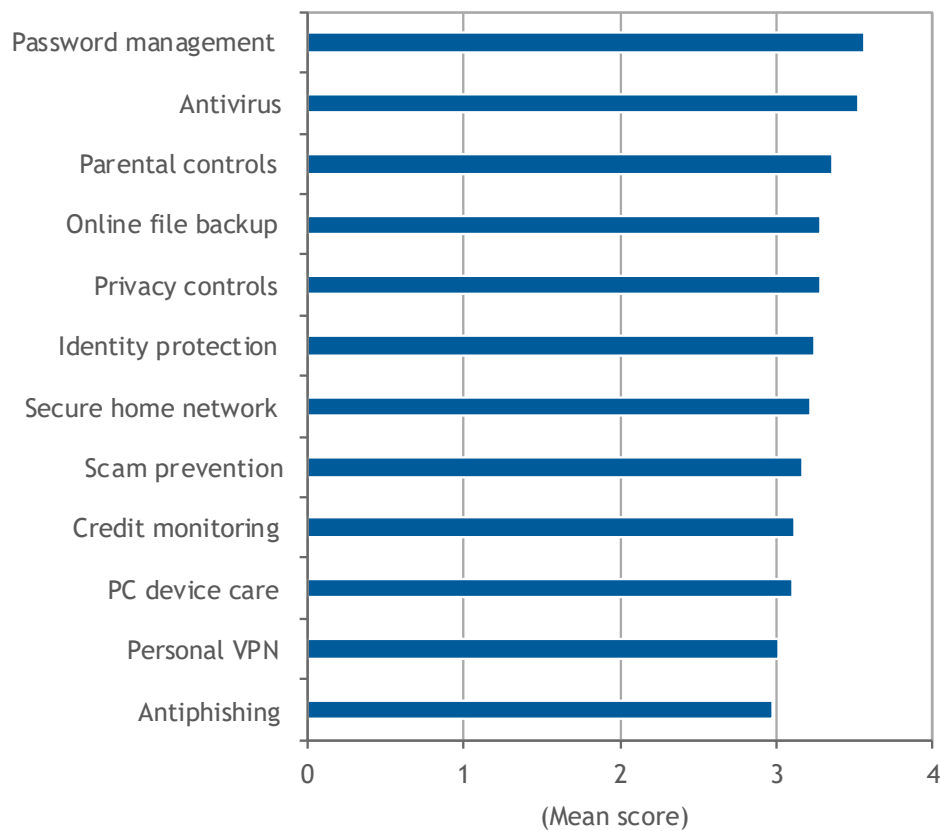
As a result of the increasing consumer needs, cybersecurity vendors are being challenged to upgrade their offerings beyond simple antivirus solutions. As the IDC MarketScape graphic illustrates, the consumer endpoint protection market is characterized by vendors whose value propositions are very similar. The Major Players portion of the market tends to dominate in terms of revenue. Leaders are primarily those that are pushing the innovation and integration capabilities that lead to the delivery of solutions that resonate with small office/home office (SOHO) users.

A war is being waged by vendors for market supremacy; however, their value propositions are often drowned out by marketing noise that is being generated by contending messages that tend to sound the same, especially to relatively unsophisticated consumers. This is reflected in the confusion of survey respondents when asked to rate their familiarity with the various solutions that can be adopted to protect their personal computing environments (see Figure 4).

FIGURE 4

Consumer Familiarity with Cybersecurity Solutions

Q. How would you rate your familiarity with the following digital life protection technologies?



Unweighted valid n = 1,500
Base = all respondents
Notes:
This survey is managed by IDC's Global Primary Research Group.
Data is not weighted.
Use caution when interpreting small sample sizes.
Source: IDC's *Consumer Digital Life Protection Survey*, February 2025

The challenge for all of the vendors in this study, as a consequence of the background noise, is to find a way to punch their messaging through to reach the consumer.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

To be included in this study, vendors must offer a software product or products that deliver endpoint protection platform (EPP) capabilities to the consumer endpoint protection market that may include the following:

- Protecting consumer PCs, tablets, smartphones, and home networks from cyberthreats (e.g., antivirus, secure home network)
- Ensuring online communications are private (e.g., personal VPN)
- Monitoring and resolving theft and abuse of an individual's identity and credit ratings (e.g., credit monitoring, dark web monitoring, identity protection)
- Reviewing and recommending privacy settings for mobile apps, browsers, and/or social media sites (e.g., privacy controls)
- Strengthening online account passwords and simplifying password use (e.g., password management)
- Storing a copy of digital files (e.g., photos, videos, and documents) in an online storage site (e.g., online file back-up)
- Extending parental controls to children's online activities and encouraging appropriate online behaviors
- Scam prevention
- Improving PC performance (e.g., device care)

All products in the previous list must support end-user devices that run the latest version of Windows or macOS.

In addition, each vendor needed to satisfy a minimum 2024 calendar year-earned (based on GAAP reporting) worldwide revenue for the set of products in the preceding list, excluding revenue from products sold in vendor-provided managed services bundles.

ADVICE FOR TECHNOLOGY BUYERS

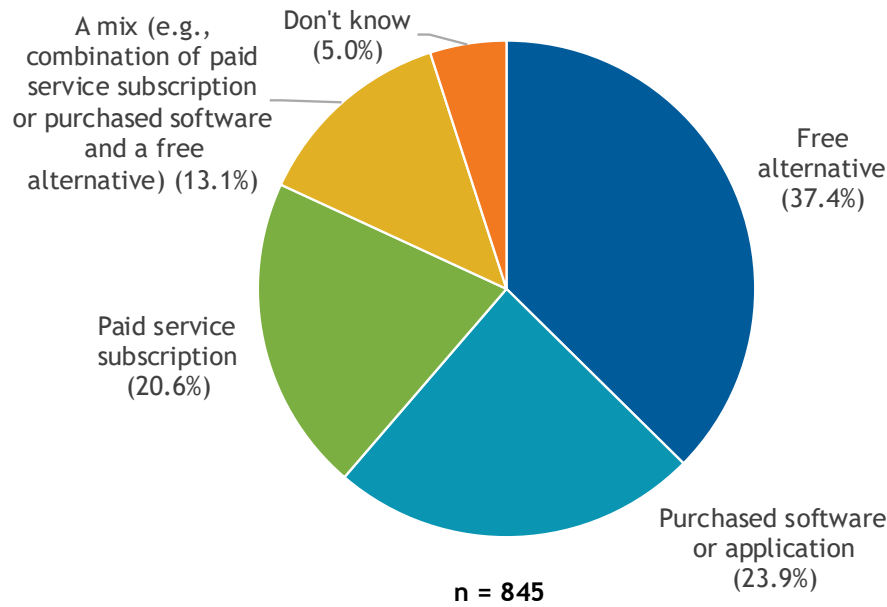
Considering the noisy environment, relatively unsophisticated users, and increasing need for capable solutions that transcend personal use to office use, how will market players achieve success in the consumer digital life protection space? The knee-jerk answer is that effective marketing is increasingly essential. Yet this approach simply leads to even more competing noise. As IDC research discloses, consumers are already overwhelmed with the claims and counterclaims that characterize the current market messaging.

IDC survey data reveals that consumers are primarily driven by tools and technologies with which they are already familiar. As Figure 5 shows, consumers currently depend on free solutions (provided on new hardware), and only 24% are willing to buy solutions.

FIGURE 5

Consumer Cybersecurity Acquisition Strategies

Q. How did you acquire each of the following technologies you indicated your household uses?



Base = respondents who indicated their organization is currently using a personal VPN

Notes:

This survey is managed by IDC's Global Primary Research Group.

Data is not weighted.

Use caution when interpreting small sample sizes.

Source: IDC's *Consumer Digital Life Protection Survey*, February 2025

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Bitdefender

Bitdefender is positioned in the Leaders category in this 2025 IDC MarketScape for worldwide consumer digital life protection.

Bitdefender is a cybersecurity provider focused on delivering effective digital protection through technical expertise and innovation. The company offers tools designed to safeguard user privacy, identity, and digital assets, including antivirus software, internet security suites, VPN services, scam prevention, password management and parental controls. These solutions aim to protect personal devices and sensitive information while remaining accessible to a broad range of users. Bitdefender's approach resonates with both individual consumers and the small office/home office market, where small business owners often require reliable yet straightforward tools to secure their operations and data. By combining professional-grade security with user-friendly design, Bitdefender supports users in navigating the digital world securely.

Strengths

Bitdefender's strengths lie in its ability to deliver effective cybersecurity solutions supported by advanced technology and a user-focused design. Its tools consistently perform well in independent testing for detection accuracy, performance, and minimizing false positives. The company's emphasis on research and development has led to the creation of technologies that address digital privacy, identity protection, and asset security.

Bitdefender's threat intelligence system incorporates device-level sensors, cloud honeypots, and network-level sensors, providing comprehensive protection for individual consumers, connected devices within a home or small office network. This capability is particularly relevant to the SOHO market, where small business owners often manage multiple devices and require seamless security across their operations. In addition, Bitdefender collaborates with law enforcement agencies globally, contributing expertise to investigations and efforts to combat cybercrime.

The company's user-friendly design ensures accessibility for individuals and small businesses with varying levels of technical expertise. Its parental controls and VPN services further enhance its appeal to families and SOHO users who value privacy and control over their digital environments. Finally, its artificial intelligence (AI)-powered chatbot can alert users to potential scams in text messages, emails, social media content, links, or QR codes.

Challenges

While Bitdefender's paid solutions are priced competitively for the value they provide, some consumers may perceive them as costly compared to free or lower-cost

alternatives. The variety of product options can also be overwhelming for certain users, requiring clear communication to help them select the appropriate solution for their needs.

As cyberthreats evolve, Bitdefender must continuously update its technology and expand its capabilities to address emerging risks. The company also faces the challenge of educating consumers and small business owners about the importance of digital life protection, which is essential for driving adoption and demonstrating the value of its services.

Consider Bitdefender When

Bitdefender is a practical choice for individuals, families, and small business owners seeking reliable digital life protection. It is particularly suitable for users who prioritize effective threat detection and professional-grade security. Those concerned about malware, ransomware, scams or phishing attacks can benefit from Bitdefender's technology and reputation. Families will find its parental control features useful, while SOHO users will appreciate its ability to secure multiple devices within a network. For anyone seeking accessible and dependable cybersecurity solutions, Bitdefender provides a balanced option that caters to both personal and professional needs.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies. In the case of this IDC MarketScape, capabilities are rated higher than strategies since IDC survey data indicates that consumers value functionality over a vendor's market strategy. For this reason, capabilities are weighted at 60% over strategies, at 40%.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor builds/delivers capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior and capability.

Market Definition

Consumer digital life protection (CDLP) captures the broader set of technologies that vendors offer to consumers to address a range of consumers' cybersecurity and digital protection needs. Currently, CDLP technologies include personal device security (i.e., antivirus), device care, connected home security, identity privacy, parental controls, consumer VPN, identity monitoring, password management, multifactor authentication, and cloud file backup. CDLP vendors can offer each technology as a separate product or in packages of CDLP technologies and features.

The number of vendors participating in the CDLP market is considerable and is not limited to independent software vendors (ISVs). Prominent platform providers (e.g., Apple, Google, and Microsoft) also offer CDLP technologies as embedded platform capabilities for free or subscription cloud services or as a combination of both.

ISVs sell to consumers through a variety of channels. Prominent among those are direct to the consumer and through OEMs (device manufacturers and communication services providers). Less prominent but still relevant are the CDLP products offered to employees as part of or an option in their employee benefit packages.

IDC's estimate and forecast of the CDLP market is limited to the subset of ISVs that sell paid-for personal device security products. For these ISVs, all their CDLP product revenue (i.e., personal) and device security (i.e., antivirus, device care, connected home security, identity privacy, parental controls, consumer VPN, identity monitoring, password management, multifactor authentication, and cloud file backup) are included in IDC's market estimate and forecast.

Related Research

- *IDC MarketScape Criteria: Worldwide High-Speed Inkjet Press 2025 Vendor Assessment* (IDC #US53766025, September 2025)
- *Next-Gen Document Services* (IDC #IDC_P26350, September 2025)
- *IDC MarketScape Criteria: Worldwide Document Scanner 2025 Vendor Assessment* (IDC #US53670825, July 2025)
- *IDC MarketScape Criteria: Worldwide Print Security Solutions and Services Hardcopy 2025 Vendor Assessment* (IDC #US52334025, May 2025)
- *Worldwide Consumer Digital Life Protection Software Forecast, 2025–2029: Evolution Driving Growth* (IDC #US53184925, March 2025)

Synopsis

This IDC study highlights the evolution of consumer cybersecurity needs beyond traditional antivirus, driven by rising threats to identity, privacy, and data. The study evaluates major vendors' capabilities and strategies, emphasizing innovation, integration, and user-centric design for individuals, families, and SOHO users. Success hinges on clear messaging, comprehensive protection, and adaptability to emerging risks in a crowded, rapidly changing market.

"As digital threats evolve, consumers and small businesses will need to rise above the marketing noise to truly protect their digital lives — or remain vulnerable in a crowded market. The challenge to vendors in this space is to address user needs while delivering a compelling value message that rises above the background noise in this competitive market." — Mike Jude, research director for Endpoint Protection at IDC

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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