

Virtual Private Network Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Component (Solution, Services), By Type (Site-To-Site, Remote Access, Extranet), By Deployment Mode (Cloud, On-premise), By End Use (Commercial, Individual, Others) By Region, and By Competition

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Abstracts

Global Virtual Private Network Market has valued at USD 50 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 21.4% through 2028. The Global Virtual Private Network (VPN) Market is undergoing a significant transformation as it continues to expand at a robust pace. This market overview offers insights into the key dynamics shaping the VPN landscape. The growing demand for secure and private online experiences is propelling the VPN market's growth. In an era marked by rising cybersecurity threats, data breaches, and concerns over online privacy, individuals and businesses alike are turning to VPN solutions to safeguard their digital activities. VPNs provide a secure, encrypted tunnel for data transmission, shielding users from prying eyes and potential threats. With the surge in remote work, e-commerce, and digital communications, the need for secure remote access and protection against cyberattacks has never been greater. Additionally, the increasing geo-restrictions on online content and the desire for anonymous browsing contribute to the growing adoption of VPN services. As a result, the Global VPN Market is expected to continue its expansion, offering users the assurance of online security and privacy in an increasingly interconnected world.

Key Market Drivers

Rising Cybersecurity Concerns

The Global Virtual Private Network (VPN) Market is witnessing substantial growth driven by the escalating concerns over cybersecurity. With an increasing number of cyber threats, data breaches, and privacy infringements, both individuals and organizations are turning to VPN solutions to fortify their online defenses. VPNs provide a secure and encrypted tunnel for data transmission, shielding users from potential threats and ensuring the confidentiality of their online activities. As the digital landscape becomes more perilous, the demand for VPN services continues to surge, underlining the critical role of the Global VPN Market in safeguarding digital assets and sensitive information.

Remote Work and Digital Transformation

The global shift towards remote work and digital transformation initiatives is a significant driver propelling the VPN market's growth. In the wake of the COVID-19 pandemic, remote work has become a standard practice, necessitating secure remote access to corporate networks and sensitive data. Additionally, businesses are increasingly adopting cloud-based services and digital collaboration tools, further emphasizing the need for secure and private connections. VPNs facilitate secure remote work, ensuring that employees can access critical resources and collaborate efficiently, irrespective of their physical location. This trend towards remote work and digital transformation is expected to sustain the demand for VPN solutions, making the Global VPN Market a vital enabler of the modern digital workplace.

Geographical Restrictions and Online Freedom

The imposition of geographical restrictions on online content and the desire for unrestricted internet access are contributing to the growth of the Global VPN Market. Many users turn to VPN services to bypass geo-blocks and access region-restricted content, such as streaming platforms, social media, and news websites. VPNs allow users to mask their IP addresses, effectively 'virtually' placing them in a different location, granting them access to content that would otherwise be inaccessible. As individuals and businesses seek greater online freedom and the ability to browse the internet without constraints, the demand for VPN services that provide anonymity and circumvent geo-restrictions remains robust, driving the growth of the market.

Protection of Online Privacy

Concerns over online privacy have become a significant driver for the VPN market. With

heightened awareness about data collection, tracking, and surveillance, users are increasingly wary of their online activities being monitored or their personal information being harvested. VPNs offer a shield of anonymity by routing internet traffic through encrypted tunnels, making it challenging for third parties to trace users' online behavior. This assurance of privacy is a compelling factor propelling the adoption of VPN services, particularly among those who prioritize keeping their online activities confidential and shielding their personal data from prying eyes.

Mobile Device Proliferation

The proliferation of mobile devices, including smartphones and tablets, is another key driver of the Global VPN Market. As mobile usage continues to soar, users seek ways to secure their mobile internet connections, especially when using public Wi-Fi networks. Mobile VPN apps provide a convenient solution by encrypting data transmissions, safeguarding sensitive information, and protecting users from potential cyber threats while on the go. The increasing reliance on mobile devices for work, communication, and entertainment fuels the demand for mobile VPN services, making them an integral part of the modern digital lifestyle.

Key Market Challenges

Lack of Standardization Hinders Data Integration

The Global Virtual Private Network (VPN) Market confronts a significant challenge stemming from the lack of standardization in the VPN landscape. With numerous VPN providers offering diverse solutions and technologies, the absence of standardized protocols and frameworks for VPN services can impede seamless data integration and interoperability. Users may face complications when attempting to integrate VPN solutions from different providers into their existing digital infrastructure, potentially resulting in fragmented VPN experiences and operational inefficiencies. This lack of standardization poses a hurdle to the market's growth, as organizations and individuals may hesitate to adopt VPN solutions that do not seamlessly integrate with their specific requirements and technical environments.

Scalability and Complexity Issues

Scalability and complexity are prevalent challenges faced by the Global VPN Market. As the demand for VPN services continues to surge, users require solutions that can adapt and scale to accommodate evolving needs. However, configuring and managing VPN

services and networks, especially in complex organizational setups, can be intricate and resource-intensive. This complexity may be overwhelming, particularly for users with limited technical expertise. The challenge of scalability and complexity can discourage potential users from adopting VPN solutions, limiting the market's expansion. Ensuring that VPN solutions can be effectively deployed and maintained at varying scales and complexities remains a critical challenge for market players.

Rapidly Evolving Cybersecurity Threat Landscape

The ever-evolving cybersecurity threat landscape presents an ongoing challenge for the Global VPN Market. As cyber threats become increasingly sophisticated and diverse, VPN providers must continuously innovate to offer robust security measures that can effectively counter emerging risks. Failure to address evolving cybersecurity threats adequately can undermine the market's growth potential, as users demand VPN solutions that can guarantee the highest level of security and data protection. VPN providers must remain vigilant and proactive in adapting to new threats, enhancing encryption protocols, and bolstering security measures to maintain user trust and market relevance.

Data Privacy and Legal Compliance

Privacy and legal compliance concerns are paramount challenges for the Global VPN Market. With growing awareness of data privacy issues and stringent data protection regulations, VPN providers must navigate a complex landscape of legal and regulatory requirements. Ensuring user data privacy, complying with regional and international data protection laws, and providing transparency in data handling practices are essential for VPN providers. Failure to address these concerns effectively can result in regulatory penalties, loss of user trust, and reputational damage within the VPN market. Balancing the need for data security and user privacy while adhering to evolving legal requirements remains an ongoing challenge for market participants.

Key Market Trends

Increasing Demand for Digital Content Storage

The global Virtual Private Network (VPN) market is witnessing a surge in demand driven by the growing need for secure and efficient digital content storage. With the widespread use of digital devices such as smartphones, tablets, and laptops, individuals and businesses are generating vast amounts of digital content. This content includes

everything from documents and multimedia files to sensitive data that requires protection. Moreover, the adoption of cloud-based services for data backup, synchronization, and storage is contributing to the rising demand for VPN services. Users are actively seeking VPN solutions that offer robust data encryption, ease of use, and seamless integration with their devices and cloud platforms to ensure the security and accessibility of their digital assets.

Shift towards Remote Work and Virtual Collaboration

The shift towards remote work and virtual collaboration is significantly impacting the VPN market. As organizations embrace remote work models and rely on virtual collaboration tools, there is an increased need for secure and reliable VPN services. These services are crucial for ensuring that employees can securely access company resources and collaborate virtually from anywhere. The demand for VPN solutions that seamlessly integrate with collaboration platforms and provide secure file sharing capabilities is on the rise. From video conferencing to document sharing, the ability to access and exchange data securely is a top priority for businesses and individuals alike.

Growing Emphasis on Data Security and Privacy

Data security and privacy have become paramount concerns in the VPN market. Users are increasingly aware of the risks associated with cyber threats, data breaches, and unauthorized access to their sensitive information. As a result, there is a growing demand for VPN solutions that prioritize robust encryption, password protection, and secure remote access. VPN providers that offer privacy-focused services and compliance with data protection regulations are gaining traction. Users seek VPN solutions that provide peace of mind and the confidence to transmit and store sensitive data securely, reinforcing the importance of data security and privacy in the VPN market.

Integration of Advanced Features and Connectivity Options

VPN solutions are evolving to cater to changing user needs, emphasizing advanced features and enhanced connectivity options. Users are looking for VPN services that seamlessly integrate with multiple devices and platforms, including smartphones, tablets, laptops, and various operating systems. Additionally, features such as automatic VPN activation, split tunneling, and mobile apps for easy configuration and usage are becoming essential. The integration of advanced features not only enhances the user experience but also adds convenience and versatility to VPN services, meeting

the demands of users who require constant and secure access to their data from diverse locations and devices.

Rise of Hybrid VPN Solutions

Hybrid VPN solutions, which combine the benefits of local VPN servers with cloud-based VPN services, are gaining popularity in the VPN market. These hybrid solutions offer users the advantages of both local VPN infrastructure, providing fast and controlled access to data, and cloud-based VPNs, offering scalability and remote access. Users can store frequently accessed data on local servers while offloading less frequently used or larger files to the cloud via VPN connections. Hybrid VPN solutions provide users with flexibility, cost-effectiveness, and the ability to efficiently manage their data across various VPN platforms, reflecting the market's response to the need for diverse and adaptable VPN services.

Segmental Insights

Component Insights

The solution segment accounted for the largest revenue share of over 64.0% in 2019. The services segment is expected to register a significant CAGR over the forecast period. Virtual private network solutions have been gaining high traction, particularly among commercial vendors and individual solution providers, over the past few years. The rapidly-changing nature of work and the changing commercial requirements for virtual private networks would continue to drive the demand for VPN services.

A typical virtual private network solution includes control features, reporting, and management. Over the past few years, vendors have been collaborating with mobile VPN vendors and NAC solution providers as part of the efforts to drive the sales of VPN solutions. VPN services are aimed at enabling the virtual private network to secure a remote connection. Besides, vendors are allowing buyers to compare the prices online in real-time, thereby helping cost-conscious buyers in assessing the VPN services on offer before making a buying decision. At the same time, advances in technology coupled with economies of scale are also expected to allow providers to further reduce their cost structure and accelerate their investments in other aspects.

Type Insights

The remote access segment accounted for the largest revenue share of 35.8% in 2019.

This can be attributed to the increasing number of franchised dealers in the market. The extranet segment is expected to register a significant CAGR over the forecast period. The growth can be attributed to the growing usage of extranet by enterprises to post private information on public networks. Moreover, companies are also focusing more on extending their internal web applications to the company's partners and consumers.

The need for remote access and site-to-site connectivity has been increasing gradually to ensure seamless connectivity. Remote access and site-to-site connection ensure bandwidth and data comparison optimization. The proliferation of mobile VPN devices and the growing need for remote accessibility has been driving the demand for remote virtual private network solutions over the past few years. Remote access can particularly help organizations in complying with security regulations.

Deployment Mode Insights

The cloud segment accounted for the largest revenue share of 72.8% in 2019. This can be attributed to the growing preference for cloud-based deployment to reduce maintenance and costs. Prominent market players are offering virtual private cloud to provide a secure gateway and private on-premise access to cloud resources. For instance, in December 2018, IBM Corporation announced the launch of an on-premises VPN gateway to a cloud VPN created within a VPC.

Vendors are offering virtual private cloud to help enterprises in establishing a private cloud computing environment on shared public cloud infrastructure. These offerings are designed to provide a granulated control over granting or blocking access to particular resources for enterprise customers through specific applications or IP addresses. Cloud infrastructure resources, including storage, virtual servers, and networking, can be deployed dynamically to help VPC customers in adapting to the changes according to their business needs. The subsequent reduced costs and lower maintenance can allow enterprises to focus on attaining core competencies and key business goals.

Regional Insights

North America accounted for the largest revenue share of 35.1% in 2019 owing to the rapid growth in the demand from telecommunications and BFSI, among other industries and industry verticals in the U.S. The European market also accounted for a notable market share and is expected to witness steady growth. On the other hand, Asia Pacific is projected to register the highest CAGR over the forecast period in line with the increasing adoption of VPN solutions and services in China, India, and other Asian

countries. China is currently dominating the Asia Pacific region with a rising number of organized players with mobile VPN services. As there are various government policies and regulations regarding popular websites, offering the virtual private network as a solution provided a number of opportunities for entrepreneurs in China, Indonesia, and other Asian countries. Additionally, using VPN services has availed easy networking, and streaming in Asian countries. Using the virtual private network also ensures users about the encryption of their data and protection from hackers. These are the factors that have become significant driving factors to boost the demand for VPN solutions and services in Asian countries.

Remote working has been the new normal for almost all IT enterprises. Since the emergence of the COVID-19 pandemic, there has been a significant increase in the use of remote desktops and virtual private network (VPN) connections. The increase in remote employees and multiple devices is driving the demand for improved visibility and management. Furthermore, the remote users are now able to log in to different networks, that makes central management difficult. Along with managing these devices, enterprises also want to activities of monitor mobile workers on wireless connections.

Key Market Players

Avast Software s.r.o.

BlackBerry Limited

Cisco Systems, Inc.

Citrix Systems, Inc.

CyberGhost S.R.L.

Google LLC

IBM corporation

NetMotion Software

Opera Group Company

WatchGuard Technologies, Inc.

Report Scope:

In this report, the Global Virtual Private Network Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Virtual Private Network Market, By Component:

Solution

Services

Virtual Private Network Market, By Type:

Site-To-Site

Remote Access

Extranet

Virtual Private Network Market, By Deployment Mode:

Cloud

On-premise

Virtual Private Network Market, By End Use:

Commercial

Individual

Others

Virtual Private Network Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Belgium

Asia-Pacific

China

India

Japan

Australia

South Korea

Indonesia

Vietnam

South America

Brazil

Argentina

Colombia

Chile

Peru

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

Israel

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Virtual Private Network Market.

Available Customizations:

Global Virtual Private Network market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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15.3.4. Key Personnel/Key Contact Person

15.3.5. Key Product/Services Offered

15.4. Citrix Systems, Inc.

15.4.1. Business Overview

15.4.2. Key Revenue and Financials

15.4.3. Recent Developments

15.4.4. Key Personnel/Key Contact Person

15.4.5. Key Product/Services Offered

15.5. CyberGhost S.R.L.

15.5.1. Business Overview

15.5.2. Key Revenue and Financials

15.5.3. Recent Developments

- 15.5.4. Key Personnel/Key Contact Person
- 15.5.5. Key Product/Services Offered
- 15.6. Google LLC
 - 15.6.1. Business Overview
 - 15.6.2. Key Revenue and Financials
 - 15.6.3. Recent Developments
 - 15.6.4. Key Personnel/Key Contact Person
 - 15.6.5. Key Product/Services Offered
- 15.7. IBM corporation
 - 15.7.1. Business Overview
 - 15.7.2. Key Revenue and Financials
 - 15.7.3. Recent Developments
 - 15.7.4. Key Personnel/Key Contact Person
 - 15.7.5. Key Product/Services Offered
- 15.8. NetMotion Software
 - 15.8.1. Business Overview
 - 15.8.2. Key Revenue and Financials
 - 15.8.3. Recent Developments
 - 15.8.4. Key Personnel/Key Contact Person
 - 15.8.5. Key Product/Services Offered
- 15.9. Opera Group Company
 - 15.9.1. Business Overview
 - 15.9.2. Key Revenue and Financials
 - 15.9.3. Recent Developments
 - 15.9.4. Key Personnel/Key Contact Person
 - 15.9.5. Key Product/Services Offered
- 15.10. WatchGuard Technologies, Inc.
 - 15.10.1. Business Overview
 - 15.10.2. Key Revenue and Financials
 - 15.10.3. Recent Developments
 - 15.10.4. Key Personnel/Key Contact Person
 - 15.10.5. Key Product/Services Offered

16. STRATEGIC RECOMMENDATIONS

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