

# State of Security Vendors

RSAC 2026

*Andy Ellis*



## Key Takeaways

The 607 observed security vendors, as expected, talked *a lot* of AI on their booths. 37% of booths mentioned it! A mere 9% mentioned Platform, and Enterprise was down at 4%. Almost 8% of exhibitors had booths that a security practitioner *couldn't tell what the vendor did*, unless they already knew the vendor.

The spaces that vendors (and their VCs) clearly think need more solutions? Software Security, Identity, and Security Operations have the most exhibitors by far. If you're in one of these spaces, you have a lot of competition, and everyone seems to be trying hard to confuse the buyers with extremely differentiated messaging.

### Notable and Niche Keywords

- Deepfake (4 exhibitors). Another 4 had it in their blurbs, but not in their booths.
- Quantum/PQC (12 exhibitors).
- Non-human (4 exhibitors). This category eaten by AI.
- Platform (53 exhibitors).
- Resilience (19 exhibitors).
- Zero Trust (14 exhibitors).

The show floor behaves more like a town center “Halloween a few days early” than it does a place to learn. Trick-or-treaters abound, and the booth designs indicate more interest in scanning badges than in educating the market.

## Methodology

This report is built based on observations made, in person, looking at each of 607 exhibitor booths on the RSAC 2026 show floor. Taking about eleven hours across three days, each booth was observed, with major visible taglines, branding, and important keywords recorded via dictation on an iPhone directly into a spreadsheet. That spreadsheet had been prepopulated with the exhibitor list (pulled down via an agent scraping the RSAC website).

Each booth was quickly assessed in real-time to answer three very specific questions:

- Was the booth strongly themed?
- Did I understand what the company did, based on the booth alone?
- How did the company handle the Oxford comma?

I then tried to determine whether my impression of what the company did matched the summary they had provided to the RSAC website, to assess what broad market space they were in. Sometimes, I ended up more confused: the booth designer clearly thought the company was in a different space than whoever wrote their copy.

What I didn't collect? The taglines from all the *non*-exhibitors, whether they had space near Moscone, or were just wrapping buildings. But it felt like there were a lot more vendors who *didn't bother even getting a booth at RSAC*, but still had a large presence. To all of you that had lounges and food around RSAC: thank you.

## Consuming this Analysis

This report is *not* just a product or CISO view of the security market. Rather, it's a *marketing* perspective: how do event marketers see the cybersecurity landscape, and their role in it? What do *they* think that security buyers are looking for and buying? That is then filtered through a CISO/VC perspective.

There's a further nuance to this view. Event marketers often have a very perverse incentive. Common marketing practices drive to maximize the number of *touches* that a company has with security practitioners, *whether or not a practitioner is in market now, or will ever be*. This drive is motivated partly by the battle over revenue attribution, and partly over the lead generation model of maximizing leads of any quality, and filtering via fairly cold outreach to those leads. As a result, exhibition floors often have a Halloween feel to them, with attendees trading their contact information in exchange for some piece of marketing shwag.

Sometimes that's not even a trade. At least twice on the show floor, a marketer attempted a non-consensual scan of my badge, one of whom even insisted that by being at RSAC at all, I'd given my consent.

So many booths seem to be nothing more than beautiful bait, luring in the unsuspecting attendee until they can be hooked into coughing up their personal details. Others are simply a product sheet, showcasing what a company does. Any demographic analysis covering both ends of that spectrum will have some infelicities.

## Booth Overview

### The Rise of AI and Agents

If you felt inundated by the terms AI or agentic, that's unsurprising. 205 vendors had the term *AI* on their booth, and 60 had *agent* or *agentic*. There is some overlap between those two sets, so that's a total of 223.

But a *lot* of those are just AI-washing. Almost everyone in the third-party ecosystem spaces (API security, SaaS security, even some of the third party risk management) mentioned the risk of AI *in those third parties*. Another large group of vendors appear to marketing having an LLM assistant for querying their knowledgebase. Yet more just talk about AI-driven threats, acknowledging they have the same technology they always had, been needed to have *AI* in their buzzwords.

### The Oxford Comma

I'm well aware that the AP Style Guide eliminates the Oxford comma, but they're *wrong*. Even if you don't agree with me, failing to use it on the side of your booth is picking a fight with your potential buyers that you don't need. Thirty-three booths had content where an Oxford comma would be appropriate. Six of them dodged the issue entirely, using the flexibility of a booth wall to do something other than a comma-separated list (more than six did this with lists longer than four items, but those don't represent an active choice on Oxford commas). Nine chose to not use the Oxford comma (at least one then wrapped that into an even larger sentence, with commas all over the place, except in the Oxford comma spot). And 18 booth designers are heroes for correctly using the Oxford comma.

## Booth Behaviors

You might expect that someone walking the entire show floor, looking at each booth, then pulling up their phone to dictate into it would draw a lot of booth attention. You'd be wrong. By and large, I walked the show floor entirely disregarded by booth staff. I visited the east end of the South Expo hall during the opening reception, so there's a confounding variable there given the crowds. The Early Stage Expo I hit during their (sparsely attended) opening reception. While of course startups I knew or advised usually saw me and engaged, only two others did. Wednesday was my long day (5+ consecutive hours on the floor), and there I generally saw the behavior I expected: booth staff in 10' booths engaged with more passersby, while any booth with a minimum 20' dimension was less likely to have staff looking outward (except for the time I had an aggressive non-consensual badge scan attempt, which was a larger booth).

Where I did have booth staff approach me, I'd tell them what I was doing. A few immediately asked me to give them honest feedback on their booth (you all know who you are, and if I'd marked each of you down, I'd give you all shoutouts), which was really the best play. Most just chatted briefly or moved on, but a few seemed to only have one talk track, and immediately went into their pitch, trying to pull me deeper into their booth. I'd like to charitably suggest they wanted better coverage, but I suspect it's more likely that they didn't have a briefing on how to deal with someone like me (in fairness, that last phrase probably applies more widely than I'd think).

## Design Spectacles

Many booths have a mild theme running through the booth. Thirty vendors, however, focused more on the booth's theme than on the product they're selling. Sometimes it's a play on the company's name (Alice brought a wonderland, Sumologic a dojo, and Legion a castle), other times it's integrated into the message (AirMDR with a Clue theme supporting investigations, Mesh's forest highlight hidden exposures ("you can't see the forest for the trees"), or Cyberark's Identity Hero). Unfortunately, most of the over-the-top design spectacles seemed to rely on an attendee already knowing what a vendor does.

## Memorable Taglines

Dragos: Safeguarding civilization

Gambit: Come for the drinks, stay for the proof.

Act Security: Untangle your cloud spaghetti

Embed Security: Security noise cancellation

Inside: Make compliance great again (entertainingly, a Spanish company)

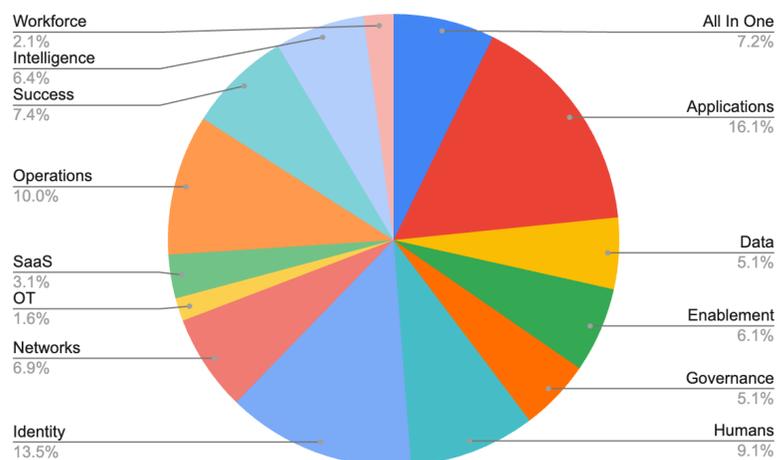
## Booth Awards (totally biased)

**Favorite:** Ubiquiti (I'm a customer, I like the open design and ability to see products, and I got an actual technical answer to an esoteric problem).

**Favorite Theme Execution:** Reco, with Attack of the AI Sprawl Movie Set (including giving you an AI trading card).

**Cleverest:** Aikido's second booth (a few sheets of plywood with the message "We spent all our money on the other booth" scrawled on it).

## Category Breakdown



You might look at that chart above and find some surprising things. *There isn't an AI category*, for instance. Other names might be confusing. Some of these have subtotals for broken down subcategories and some don't, depending on how I initially captured them. The guiding principle for this categorization is based on the *environment* that the solution targets. Each space has a handful of reference vendors in the space, selected mostly because I think I know what they do.

### All In One (44)

The All-in-One category is for vendors that are basically “outsource a big chunk of your security to us”, either as a managed service (12), as a comprehensive platform (22), or by providing consulting services (10). While arguably, consulting could be attached to the Enablement category instead, it lives here because this is more about delivering your own *security*

rather than your own *product*. Example exhibitors: AhnLab, ESET, ManageEngine, Seceon, Sophos.

### Applications (98)

The clearly largest category, Applications covers not only traditional AppSec (87), but also AI Safety (11) tools. AppSec itself is already a fairly wide category, including software supply chain, application testing, runtime security, and some web delivery/browser layer security vendors. Example exhibitors: AIBound, Cocode, Fastly, Github, HackerOne, Miggo, Minimus, Snyk, Veracode.

### Data (31)

From DSPM to DLP, with a side of encryption, Data security solutions are often found across varied environments, but with a clear focus on data as it lives in or passes through those environments. Data security vendors often have a hard challenge differentiating themselves from Application Security or Success focused vendors. Tools focusing on protecting data from AI get included here. Example exhibitors: Cyera, DataSunrise, MIND, Opsin, Varonis, Veeam.

### Enablement (37)

Scattered across the show floor you'll find Hardware (29) and Software (8) vendors to incorporate into your own products. Most of the PQC/Crypto companies end up here. Example exhibitors: OpenSSL, SafeLogic, Ubiquiti, zerothird.

## Governance (31)

The Compliance Management (23) and Third Party Risk Management (8) spaces come together into the Governance tools category, which sits very adjacent to the Success management category. Example exhibitors: Conveyor, Drata, MyCISO, SAFE, Vanta.

## Humans (55)

Core to any environment are the endpoints, whose EDRs (17) are so ineffective that we have an entire Human Risk Management (38) space. HRM includes both technical controls like email filtering as well as security awareness training. Example exhibitors: Crowdstrike, EasyDMARC, Infoblox, Island, KnowBe4, Mimecast, Threatlocker.

## Identity (82)

If the size of a space is an indication of anything, it's how abysmally we've tackled that problem to date. Identity certainly fits that bill. Spanning IAM, IGA, MFA, ITDR, as well as non-human identities, this is a space that is exploding thanks to the rise of agents, since the "I" in "AI" certainly doesn't stand for Identity. Example exhibitors: 1Password, Hush, Keeper, Okta, Sailpoint.

## Networks (42)

A triple space, Networks includes traditional NDR capabilities, as well as SASE, ZTNA, and DDoS Defense. The CDNs generally ended up here (although there is an argument that they should be in Applications, most of their messaging all ends up here). Example exhibitors: Akamai, Cloudflare, Netskope, Nord, Zscaler.

## OT (10)

There are a small handful of exhibitors focused directly on the OT, ICS, and IoT worlds. Example exhibitors: Dragos, OPSWAT.

## SaaS (19)

Judging by their booths, almost none of the SaaS Security vendors want to be associated with the term anymore, as AI is the new hotness. But since "Are you consuming it via SaaS?" is a big differentiator for AI solutions, rather than rolling SaaS into an "Agentic Services" category, all the AI SaaS Security platforms get rolled into here. We could call this "Third Party Ecosystem Security", but let's not confuse it with TPRM. There is also a close adjacency to Identity. Example vendors: Barndoor, Reco, Valence, Vorlon.

## Operations (61)

Whether you're providing a data pipeline, a SIEM (18), Security Operations/Automation (36), or Detection Engineering And Threat Hunting (7, just so I could have the acronym DEATH on a subcategory), Operations comes in third with the most exhibitors. Example exhibitors: AirMDR, Dropzone, Embed, Exabeam, Extrahop, Gurukul, Swimlane.

### Success (45)

In addition to the long-running CTEM (27) and CSPM (9) spaces, there are a growing number of exhibitors directly focused on helping security teams just configure the controls that *they've already paid for* to achieve Security Success (9). Example exhibitors: Axonius, Nagomi, Native, Orca, PsyberCog Labs, Tenable, Wiz.

### Intelligence (39)

Threat Intelligence comprises the bulk of this category, with a few offensive security companies as well (many of those fit better into Applications or Success). In future reports, odds are most of these vendors will be split into subcategories of Enablement (Intel feeds for your products), Applications, and Success, with the few remaining takedown and deception services left here as truly Offensive Security. Example exhibitors: AbuseIPDB, Acalvio, Cobalt, Filigran, Novee, Recorded Future.

### Workforce (13)

The handful of companies that provide education and training for security professionals landed in this category. Example exhibitors: CIS, CSA, EWF, Fair Institute, ISC2, SANS.

### About Us

Duha is a boutique consultancy that provides a spark of genius at the intersection of cybersecurity, leadership, product, and messaging, led by legendary CISO Andy Ellis. Duha advises CISOs, CMOs, CROs, and other executives on improving themselves and their teams. Interested in engaging Andy for a workshop on Cultivating CISOs for your SDRs and field marketers, a conversation about your messaging, or with a leadership keynote for your next event? Contact [andy@duha.co](mailto:andy@duha.co).

