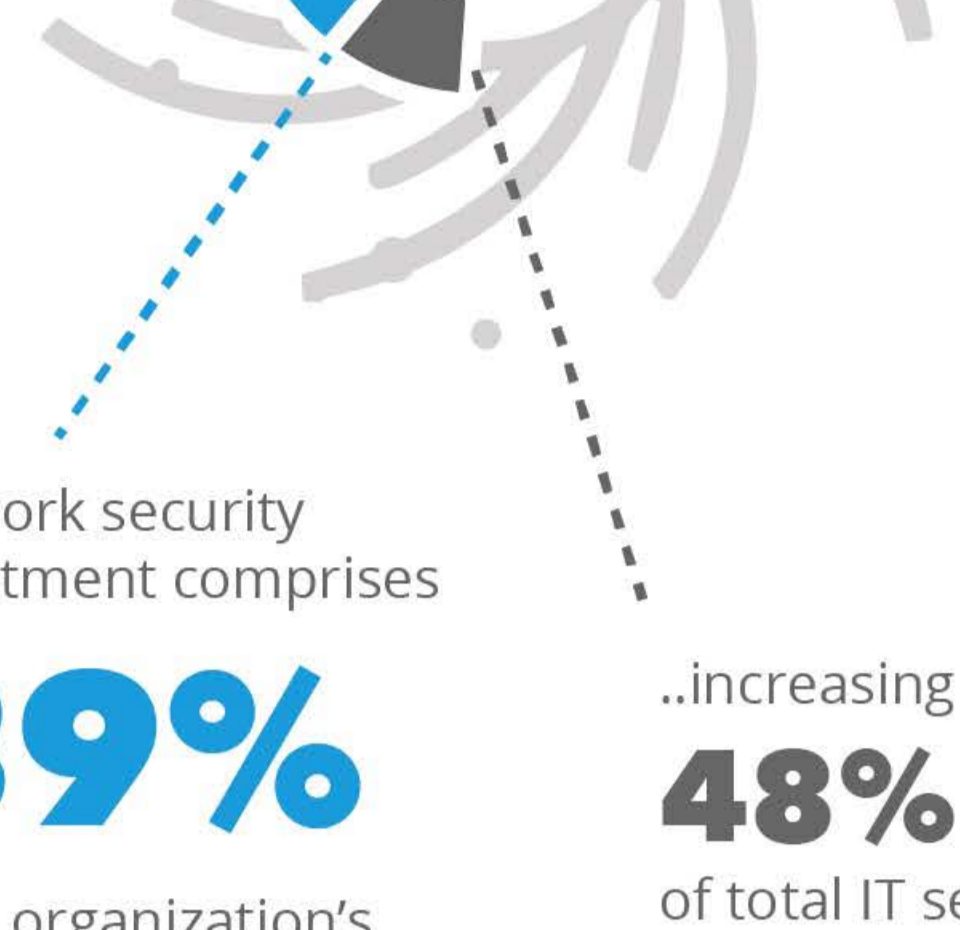


THE SHIFT TO SECURITY AS A SERVICE

451 Research conducted a survey of executives from more than 300 US-based mid-market companies to examine the challenges and new opportunities they face with respect to network security.

Download the full report at www.opaqnetworks.com/451study

Network security is a **BLACK HOLE OF TIME AND MONEY** for mid-market organizations

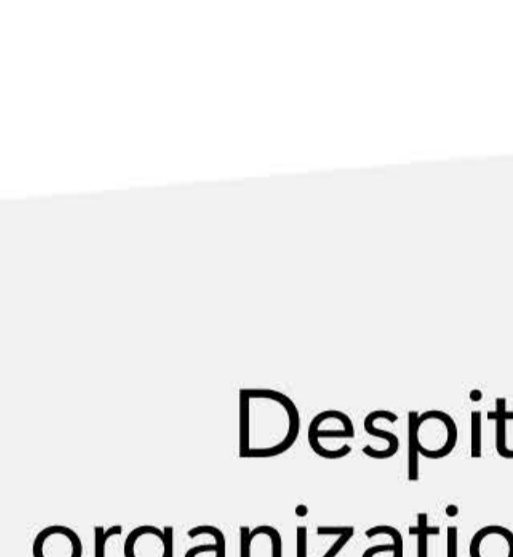


Network security Investment comprises

39% of an organization's **TOTAL IT SECURITY SPENDING**

..increasing to **48%** of total IT security spending by 2021

82% indicated that **procuring, implementing, and managing security products** consumes between 20-60 hours of in-house staff time per week



74% rely on **3-5 FTEs** to manage the security workload

Despite best efforts, organizations **lack visibility and control** across their complex, distributed network



63% indicated they have **moderate to no visibility and control** over all their distributed network assets

Organizations **lack the most** visibility and security control over

70% **THIRD PARTIES**

69% **MOBILE**

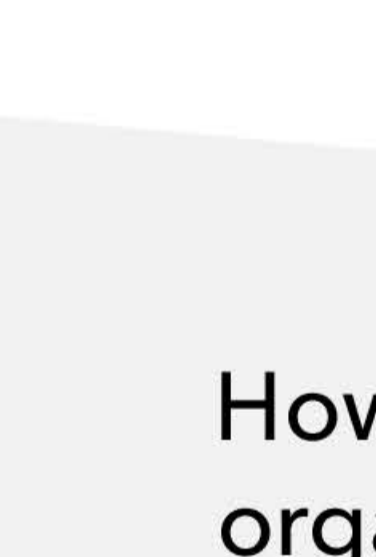
60% cited **legacy IT** as being the greatest barrier to improvement

Organizations are seeking a **more simplified, cost-effective approach** – they are shifting to **security-as-a-service**



67% indicated they would use **cloud-based security services** to manage or co-manage their security

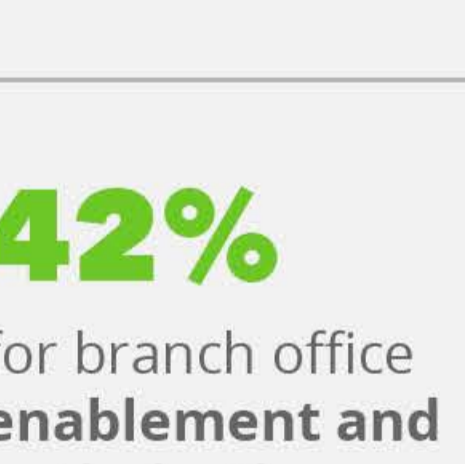
8:2 IT and security executives would use a **security-as-a-service solution** over an MSSP



NEARLY 90% indicated they have a need for or **plan to invest in network security-as-a-service** in the next 12 months

How are mid-market organizations **using security-as-a-service?**

64% cited **threat management** as the top desired use case



42% for branch office **enablement and optimization**



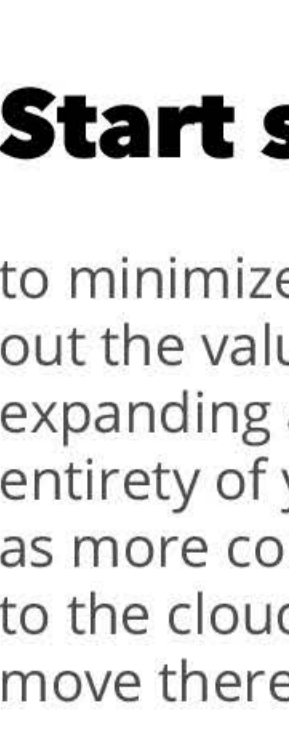
Other uses

25% **MPLS alternative**

22% **on-demand security (M&A)**

21% **MSSP displacement**

RECOMMENDATIONS FOR MID-MARKET ORGANIZATIONS



Embrace automation

to help offset the security skills shortage challenge – this problem isn't going away.

Start small

to minimize risk and prove out the value before expanding across the entirety of your business – as more computing moves to the cloud, security must move there too.



Re-allocate time and money

to innovation and growth instead of unnecessarily managing security products – this adds no value relative to the direct execution of security objectives.