

# 451 Research Mid-Market Study on Network Security

OPAQ commissioned analyst firm 451 Research to conduct a study of more than 300 respondents in US mid-tier companies to examine the challenges and opportunities that they face with respect to network security. This one-pager only highlights the findings from the 50 respondents from the healthcare industry. The complete research findings and infographic can be [downloaded here](#).

## Healthcare Providers Demographics

Number of respondents	50
Avg. number of employees:	770
Avg. number of FTEs focused on network security	3-4
Avg. number of branch offices	3-5
Early adopters of new technology	30%

## Spending

Healthcare providers invest 41% of their total IT security budget on network security.

Average spend on total IT security **\$420.5k**

Average spend on network security **\$171.9k**

## Challenges

Despite significant budget, time, and other resources dedicated to network security, healthcare providers firms struggle with **low visibility** and **lack security control** over their distributed network.

- Number of hours spent each week using in-house staff time procuring, implementing and managing network security products and services: 21-60 Hours (70%)
- More than half of Healthcare respondents cited having incomplete to no visibility over Remote Users, Mobile Devices, Branch Offices, IoT Devices, and Third Parties
- Greatest barriers to improvement:
  - Legacy IT + infrastructure (58%)
  - Lack of budget (52%)

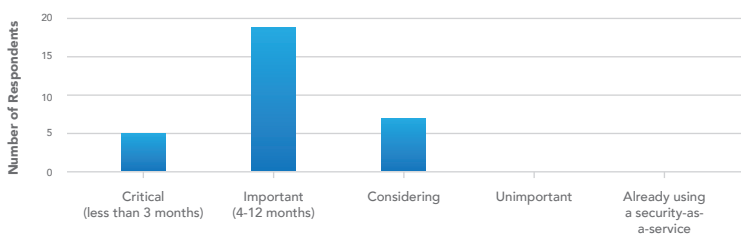
Rate the level of security, visibility, and control you have over your distributed network assets.

	Data Center	Public Cloud	Branch Offices	Remote Users	Mobile Devices	Third Parties	IoT Devices
High/Complete	54%	36%	26%	40%	24%	28%	14%
Moderate/Incomplete	44%	48%	56%	50%	52%	56%	54%
Little	2%	10%	12%	6%	18%	16%	22%
None	0%	6%	6%	4%	6%	0%	10%
	100%	100%	100%	100%	100%	100%	100%

## The Shift to Security-as-a-Service

77% of healthcare providers are looking to adopt network security-as-a-service within the next 12 months

- Preference for security-as-a-service over on premise or MSSP:
  - 62% of respondents favor security-as-a-service
- Urgency to shift to network security-as-a-service model: 61% view network security-as-a-service as important (within the next 12 months); 16% view network security-as-a-service as critical (within the next 3 months)



- Most valued use cases for Healthcare Providers to shift to network security-as-a-service:
  - Threat management (80%)
  - Branch office enablement (52%)
  - MPLS displacement (62%)

To access the complete 451 Research network security study and infographic, [download the report here](#).