NATIONAL GATEWAY SECURITY SURVEY

REPORT SUMMARY

The National Gateway Security Survey 2008 was carried out for value added distributor Wick Hill, specialists in secure infrastructure solutions, and sponsored by WatchGuard Technologies Inc., whose Firebox X e-series unified threat management (UTM) solutions are industry leaders in comprehensive, multi-layered network security. The survey was conducted on a sample of 10,000 of the top UK companies, by employee numbers and turnover. *In all, 341 of those questioned responded.*

Those questioned were senior IT decision makers, typically IT managers or IT directors. This document is a summary, with more comprehensive findings being available from Wick Hill.

Overall, the research shows a continuing, strong movement towards remote and mobile use and an awareness and concern about security issues around this. 61% of respondents reported that the number of remote users was increasing, while 45% said the number of VPNs being deployed was increasing and 43% said the number of SSL users was increasing.

The move towards remote and mobile use was confirmed by responses to questions about the most important factors in firewall/UTM choice. High availability at 90%, strong authentication at 84%, VPNs at 77%, scalability at 74% and centralised management at 67% were all considered important/very important.

The report showed that 50% of respondents indicated that wireless use was increasing and 49% had growth in VoIP usage.

While there is much talk about security being commoditised, the responses in the survey don't support this. In answers to questions on the importance of various factors in IT security purchasing, price came only third at 73%, behind performance at 90% and reseller/supplier knowledge at 74%. Web purchasing availability came bottom of the list at 15%.

Interestingly, while green issues are flagged later in the report as likely to be increasing in the future, environmental impact is well down the list for the factors influencing purchasing decisions. This proves, if proof were needed, that green credentials will only work for security products that already meet commercial requirements, including price.

When asked about their priorities for 2008, the research shows more of a focus on protecting against external threats rather than internal threats. Securing the network from external attack led the results, being rated highly by 79%, securing remote access by 75%, gateway resiliency by 70%, and authenticating remote users by 67%. Although securing the network internally was rated as important by 70%, authenticating internal users was rated highly by only 47%.

The perception that external threat is more important than internal threat is not unusual, but is not justified by other research, which consistently comes up with results indicating that security problems are more likely to come from inside an organisation than from outside it.

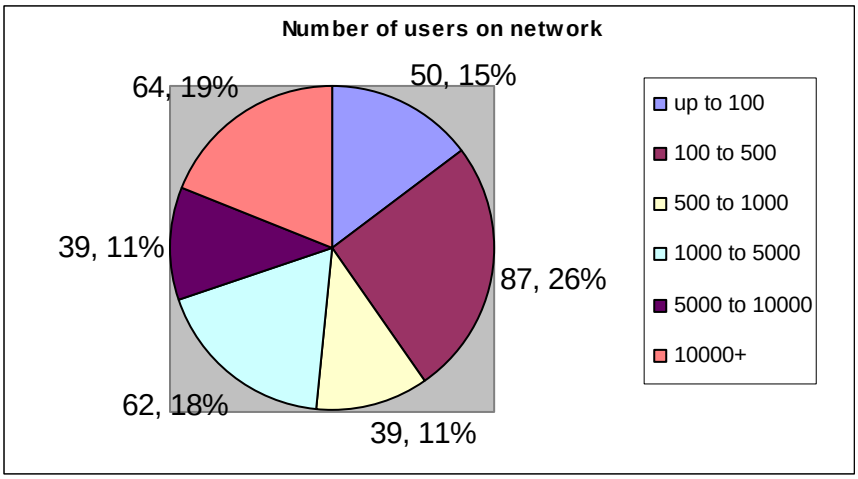
sponsored by:

WatchGuard

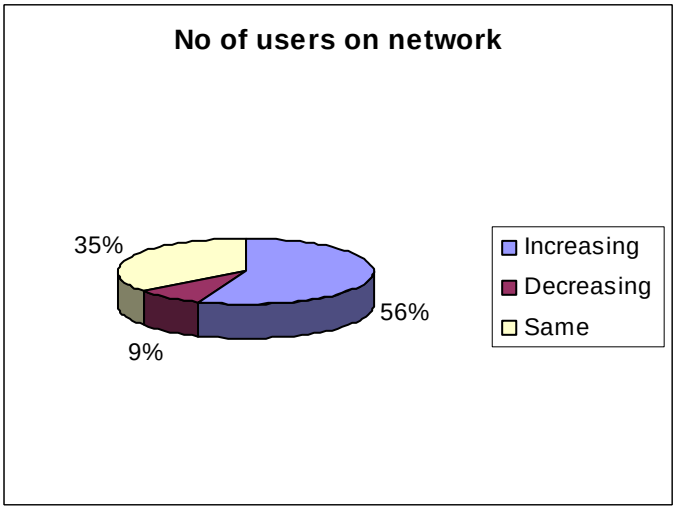
1. STATE OF THE NETWORK - WHAT IS INCREASING AND DECREASING?

The sample was asked a number of questions about the current state of their network including the number of users, the number of remote users, the number of VPNs, SSL users, wireless users and VoIP users. They were asked if these numbers were increasing or decreasing.

1a. Respondents were asked how many users were on the network.

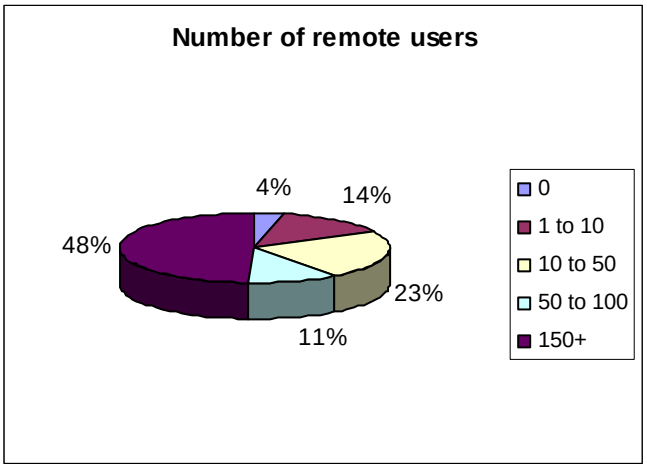


1b. Respondents were asked if the number of users on the network was increasing, decreasing or staying the same.

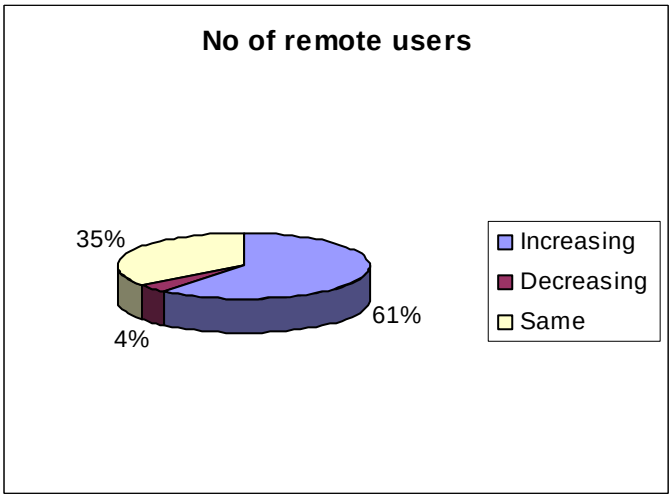


56% reported that the number of users on the network was increasing.

1c. Respondents were asked the number of remote users on the network

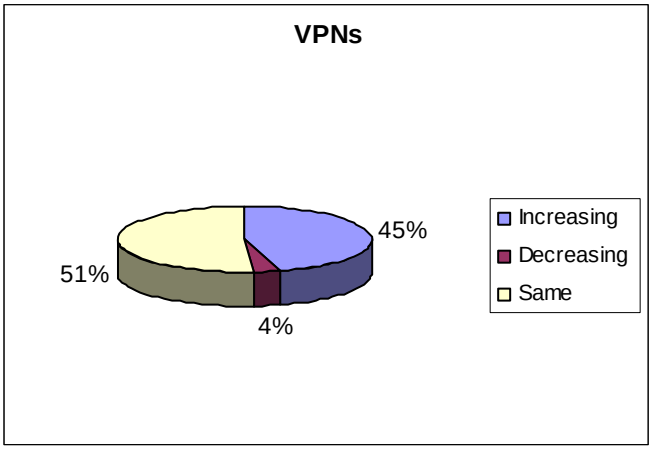


1d. Respondents were asked if the number of remote users on the network was increasing, decreasing or staying the same.



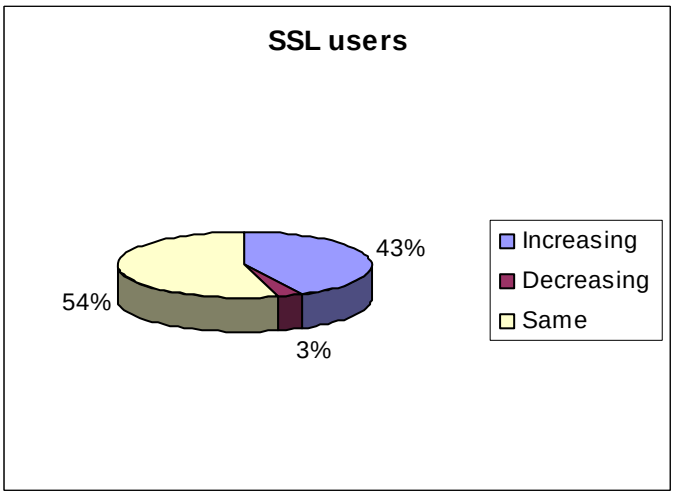
61% reported that the number of remote users was increasing

1e. Respondents were asked how many VPNs they had and whether that number was increasing, decreasing or staying the same.



45% reported that the number of VPNs was increasing

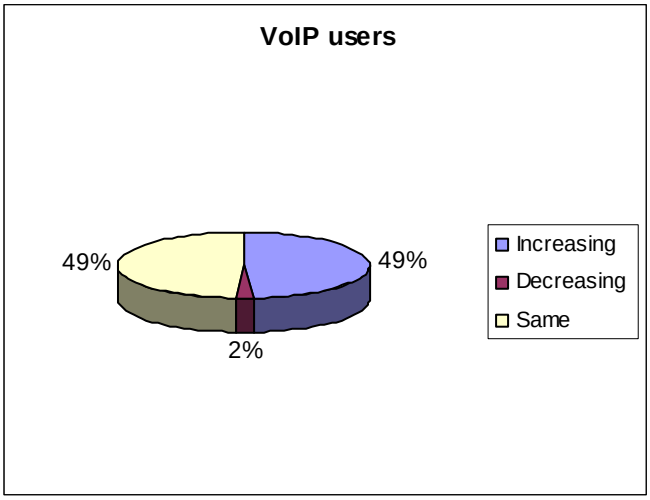
1f. Respondents were asked how many SSL users they had and whether that number was increasing, decreasing or staying the same.



43% reported that the number of SSL users was increasing

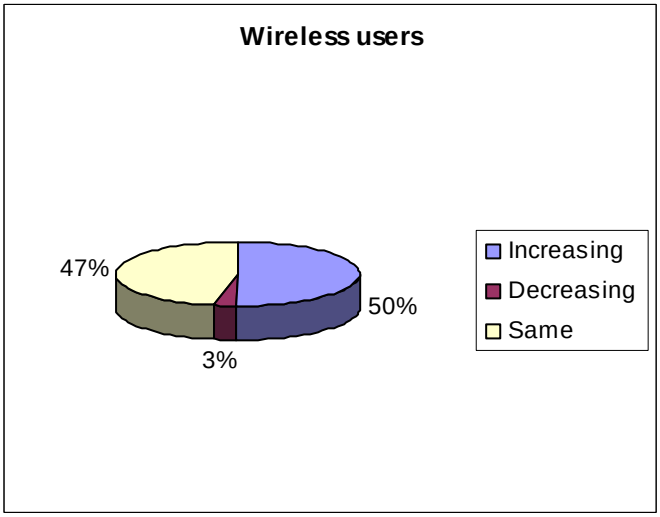
The strong growth in remote users runs alongside a strong growth in the number of VPNs being deployed (45% said they were increasing) and a strong growth in the number of SSLs being deployed (43% said they were increasing), all indicating a move towards mobile and remote use.

1g. Respondents were asked how many VoIP users they had and whether that number was increasing, decreasing or staying the same.



49% reported that the number of VoIP users was increasing

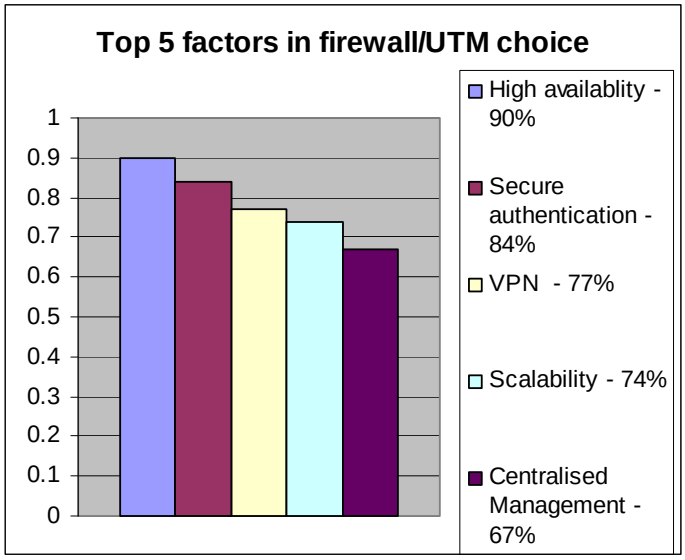
1h. Respondents were asked how many wireless users they had and whether that number was increasing, decreasing or staying the same.



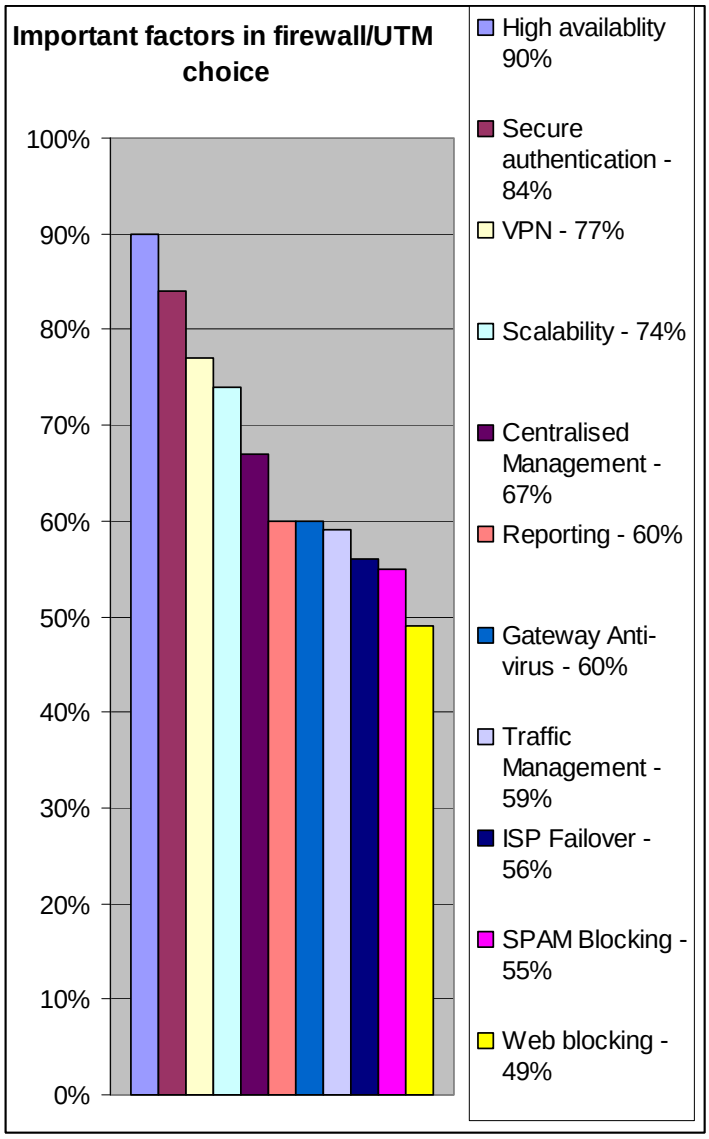
50% reported that the number of wireless users was increasing

2. CHOOSING A FIREWALL/UTM

The research looked at the factors that influence people when choosing to firewall their network. Respondents were asked to rate a number of factors on a scale of 1-5, with 5 being the highest importance. The charts show the percentage of respondents who specified a 4 or 5, indicating high importance.



Full results



We believe the research indicates that, in a scenario with increasing numbers of remote users and increasing concerns about security, UTMs are well placed to provide the firewalling features which respondents considered most important.

67% of respondents said that centralised management was very important to them when choosing a firewall. Centralised management is greatly facilitated if UTMs are used throughout an organisation, both at head office and in remote/branch offices. With the right UTM system, the head office centralised management console is easily able to manage remote, same-brand UTMs, carrying out tasks such as configuration updates and implementing security policies at remote sites.

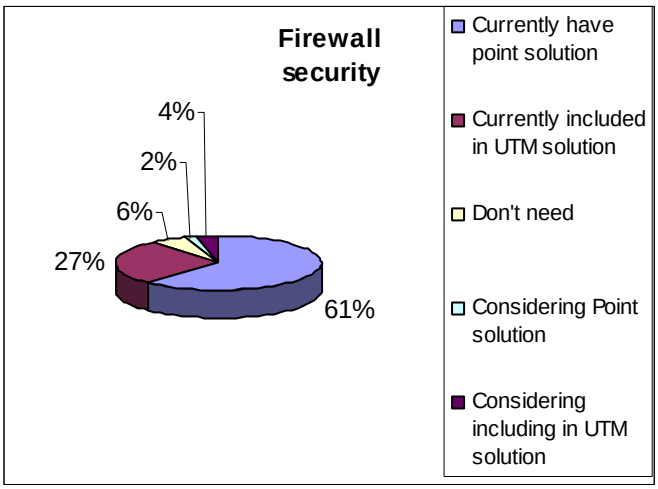
With a greater number of remote users reported in the survey and a need for easier centralised management, it makes more sense to use fewer appliances, so that again mitigates towards UTMs, which commonly combine around five functions in one appliance. Alongside this, 60% of the sample rate 'Reporting' as very important. Reporting, again, is made easier in a distributed environment with remote locations as in the UTM scenario mentioned above.

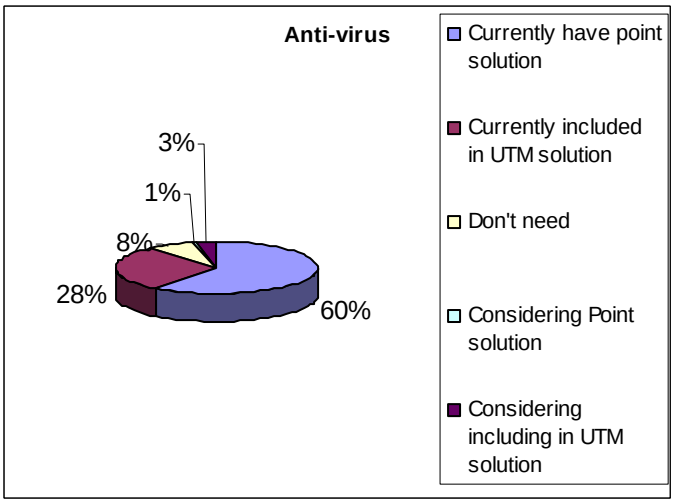
The importance of scalability (74% said it was very important) also indicates UTMs would be an appropriate solution, as it is much easier to scale one single UTM appliance than multiple point solutions distributed around the network.

Not unexpectedly, high availability was most often cited as important when it came to choosing a firewall. Perhaps more surprisingly, secure authentication was the second most cited requirement.

3. FIREWALL V UTM USE

Respondents were asked questions around firewall and UTM use, looking at whether they currently had point solutions or UTMs for a range of products such as firewalls, VPNs, spam blocking, anti-spyware, anti-virus and URL filtering. They were also asked whether they were considering UTMs or points solutions for these.

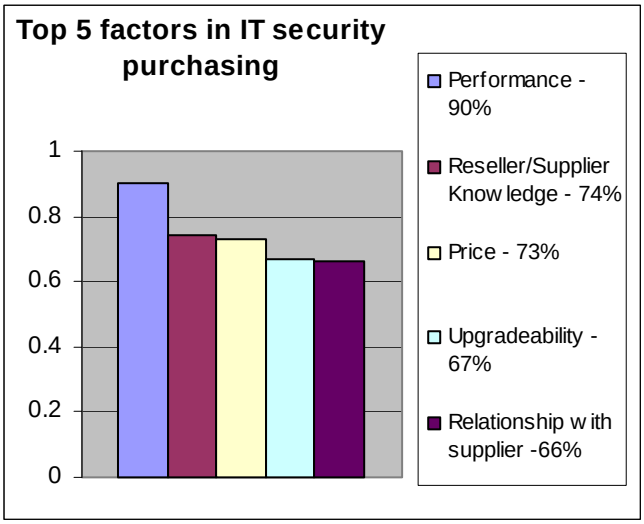




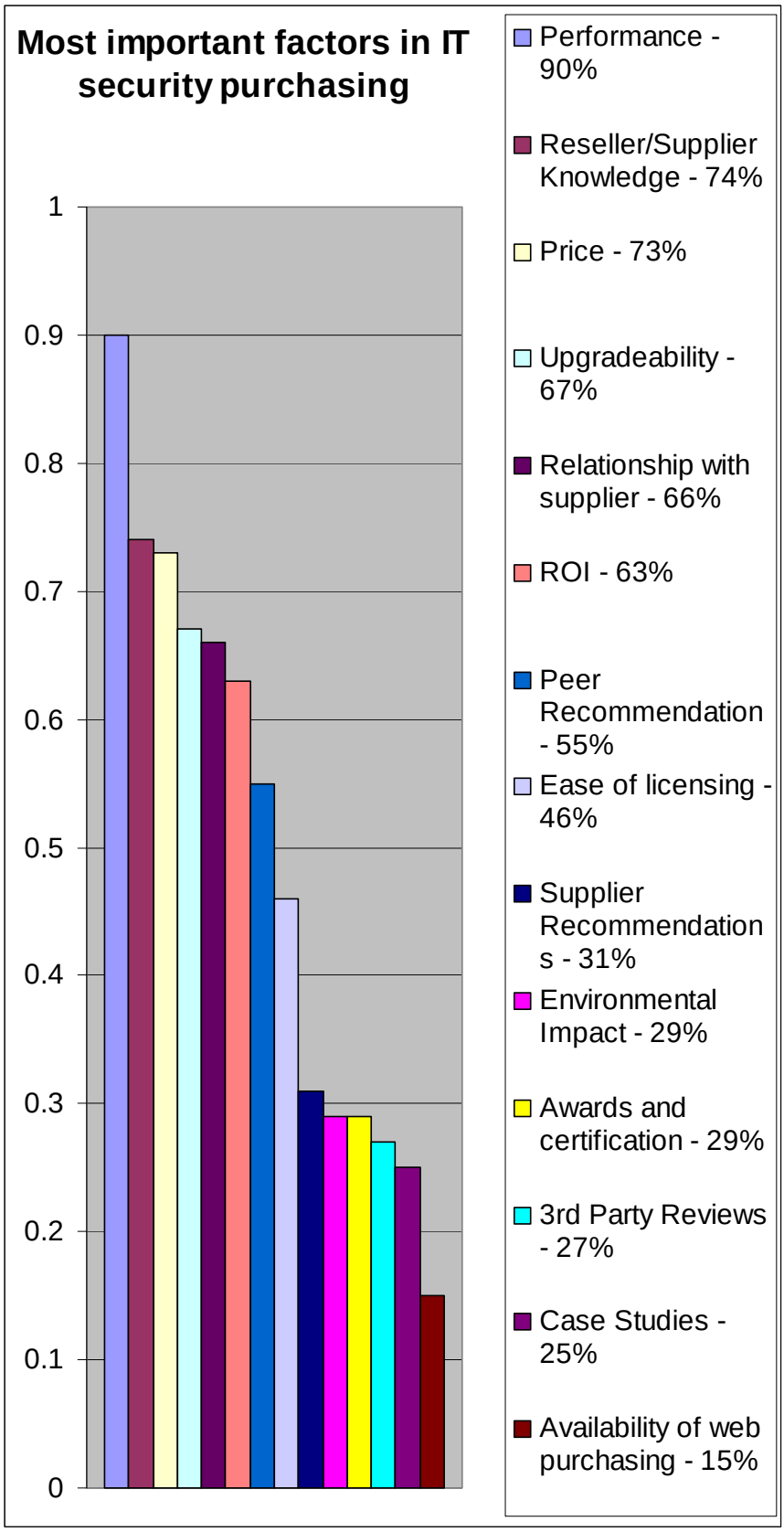
As would be expected, given that point solutions have been around for longer than UTMs, more companies had point solutions than included these products in their UTM solution. However, the results showed that more companies were considering including these products in a UTM, than were considering individual point solutions.

4. PURCHASING IT SECURITY

Respondents were asked about their decision-making factors when it came to actually purchasing IT security solutions. They were asked to rate a number of factors on a scale of 1-5, with 5 being the highest importance. The charts show the percentage of respondents who specified a 4 or 5, indicating high importance.



Full results

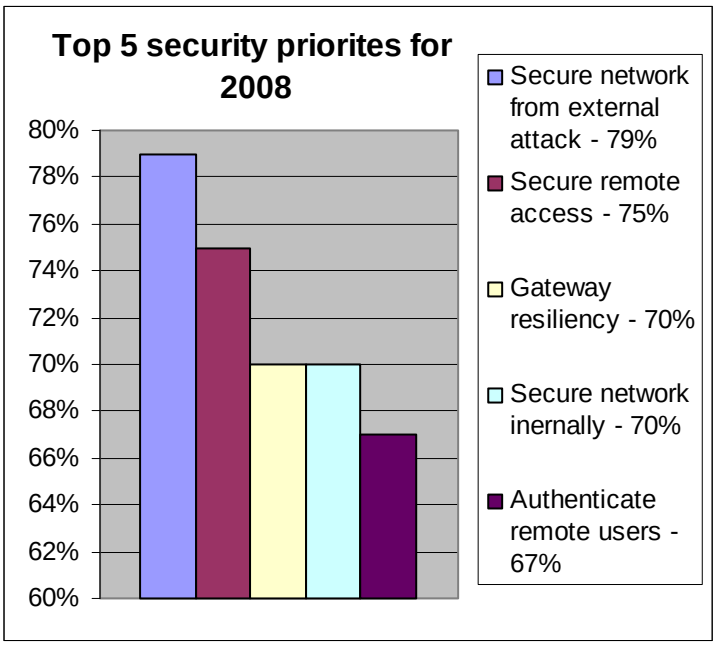


People often talk about security solutions becoming commoditised, but the results here indicate this is not the case. The availability of web purchasing comes very low on the most important decision-making factors in IT purchasing. Reseller/supplier knowledge is rated highly, with 74% considering it very important, while 66% rated the relationship with their supplier highly. Purchasers clearly still want the support and advice of their resellers and product suppliers when buying IT security solutions.

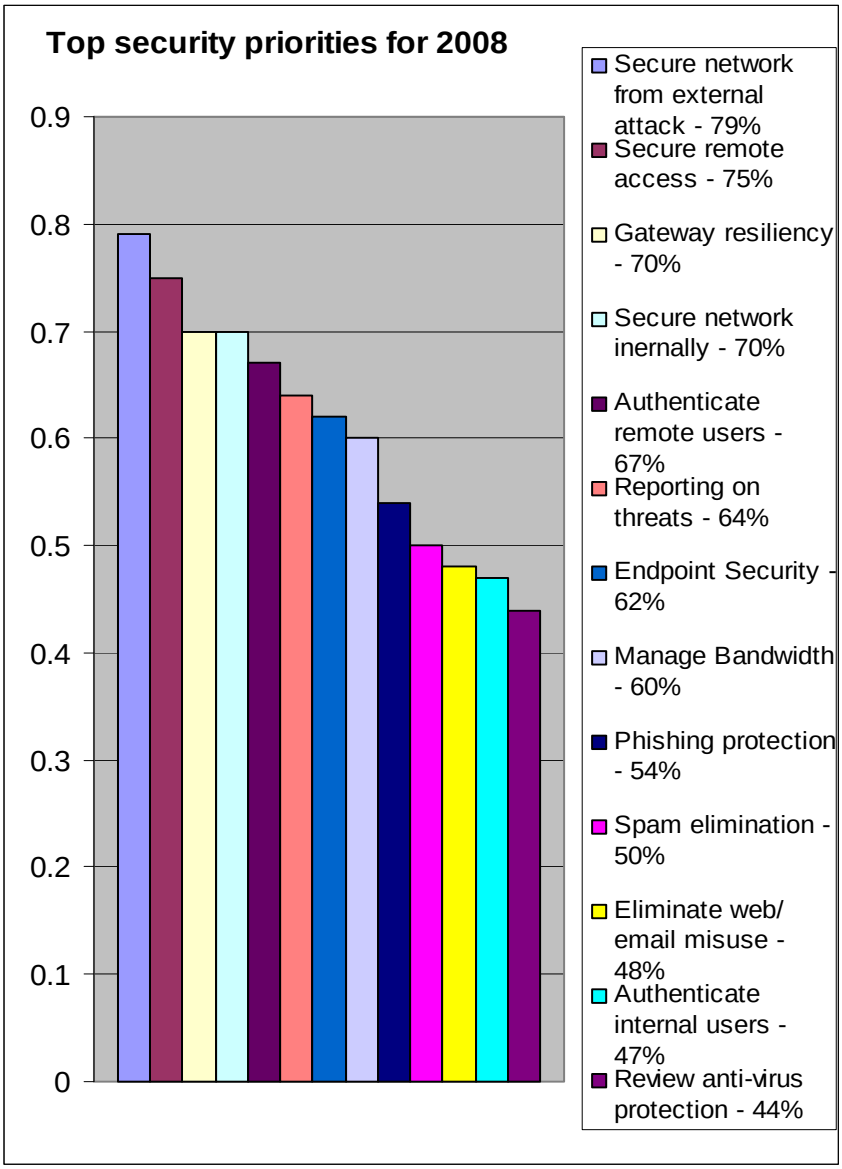
Environmental impact came down the list of important issues in purchasing decisions at 29%, but when questioned about what their IT world would look like, 62% considered green issues to be important. Clearly security suppliers will have to deliver green solutions alongside performance, knowledge and pricing to win business.

5. SECURITY PRIORITIES FOR 2008

Respondents were asked to rate their security priorities for 2008, with one being the lowest priority and 5 being the highest. The results show the percentage of respondents who specified a 4 or 5, indicating high importance.



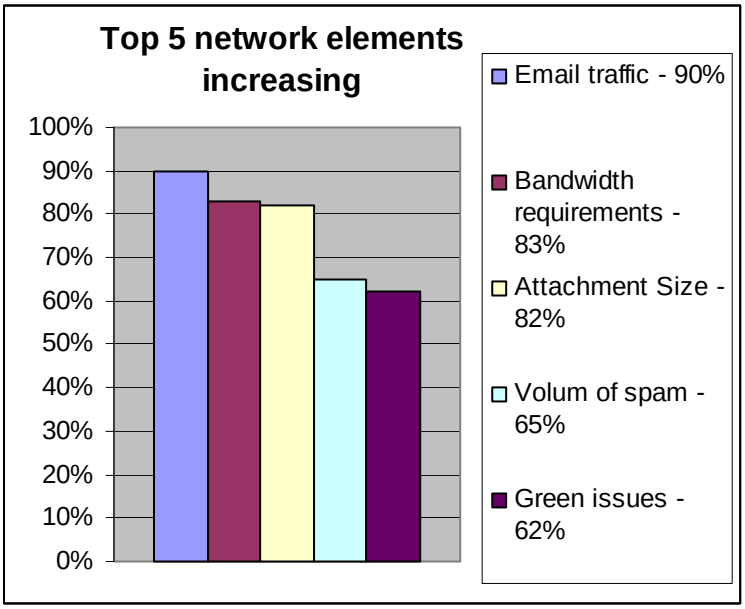
Full Results



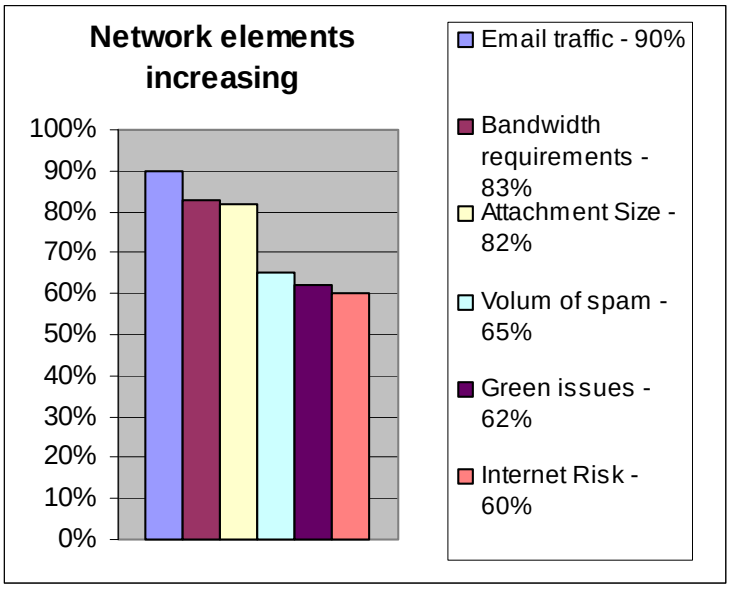
With increased remote and network access, it's probably not surprise that securing remote access and securing the network from external attack are high in the list.

6. WHAT DOES YOUR IT WORLD LOOK LIKE?

Respondents were asked what their IT world looked like and whether certain elements were increasing, decreasing or staying the same in the future. Results show the percentage of respondents who said a particular element was increasing.



Full results



With respondents expecting growth in email traffic, attachment size and bandwidth requirements, they will increasingly be looking for scalable solutions to fit these needs.

More detailed results

More detailed research results from which this information is taken are available at **www.wickhill.com/surveyfullreport**

First published August 2008. Copyright Wick Hill Ltd.