



SD-WAN Adoption is Accelerating to Reduce Security Risk

A Global Survey of Network Professionals

December 2017

Executive Summary

This research finds that securing the corporate WAN is the top challenge for network professionals, with complexity being cited as key contributor to that challenge. It is no surprise that more than half of those surveyed revealed their branch network has been breached. Nearly $\frac{3}{4}$ of companies offer direct internet connection with even more devices being deployed to combat the risk. This growing quantity of devices is increasing the time to provision new branch locations with nearly a third taking longer than a month.

These challenges are driving more than 85% of companies to consider SD-WAN specifically to increase security and reduce sprawl. Adoption of SD-WAN is accelerating compared to data from last year's survey, with more than 90% targeting deployment by the end of 2019. But education and expertise remain the key impediment to SD-WAN. Nearly every network professional surveyed wanted a single integrated solution that combines SD-WAN and networking tools with a full suite of security capabilities.

Key Findings

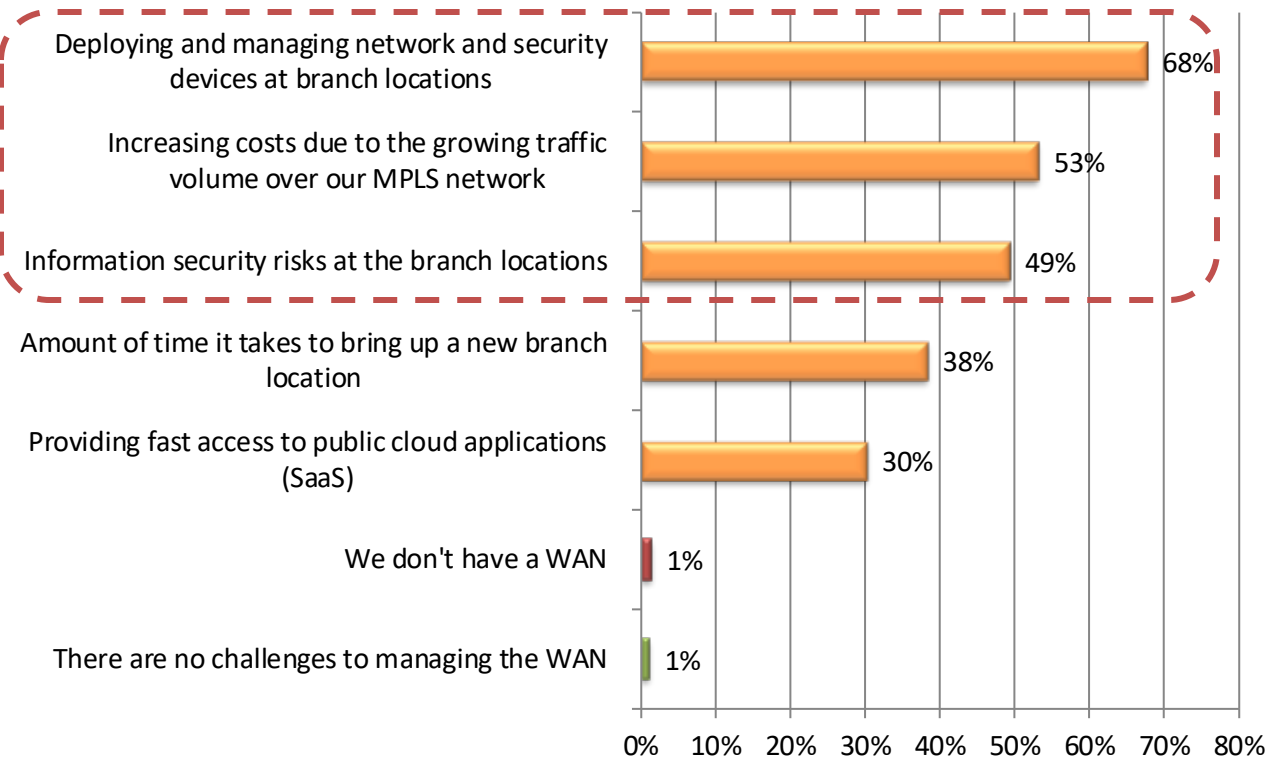
- Growing complexity cited as top issue to securing and managing branch networks
- 54% admit a security breach at the branch network
- 74% provide direct internet access at branch locations

- SD-WAN being selected to reduce risk, manage sprawl, and reduce costs
- Adoption of SD-WAN has accelerated with 85% considering or deploying SD-WAN
- 93% will have deployed SD-WAN by the end of 2019
- 96% indicated an aggregated approach for networking and security is needed

DETAILED FINDINGS

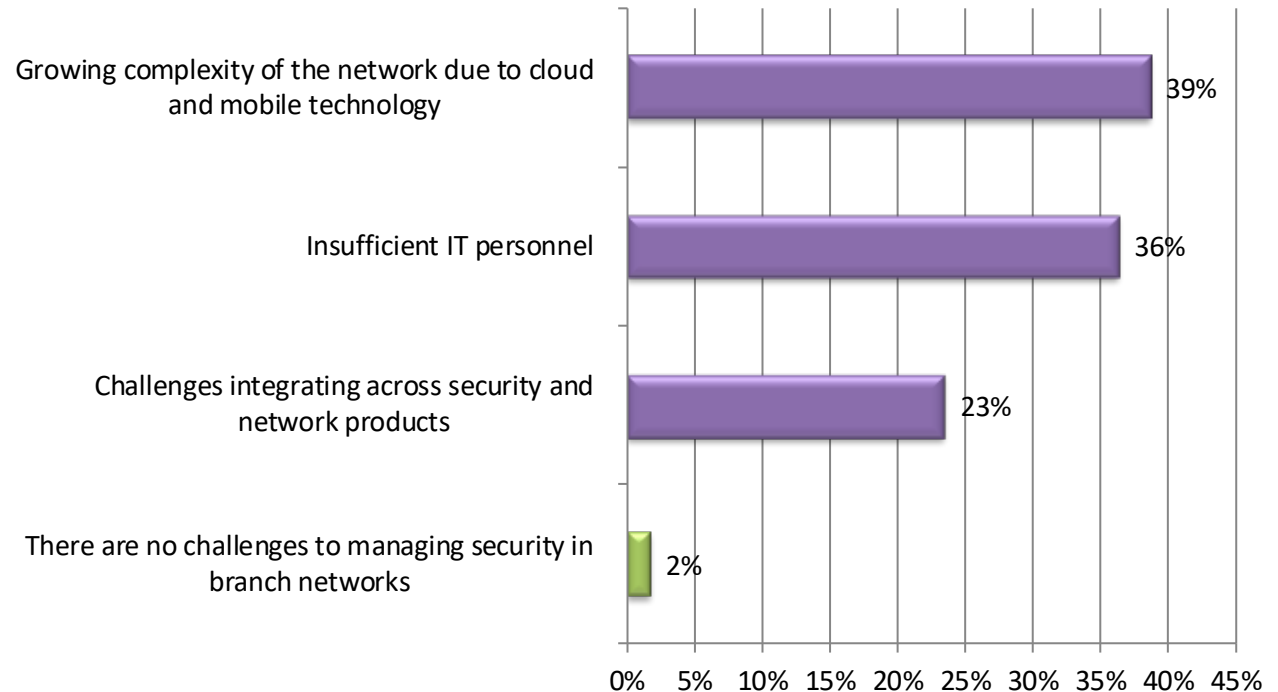
Managing, Securing, and Maintaining Costs Top WAN Challenges

What are the most challenging aspects of managing your company's WAN? Please select the top 3 challenges?



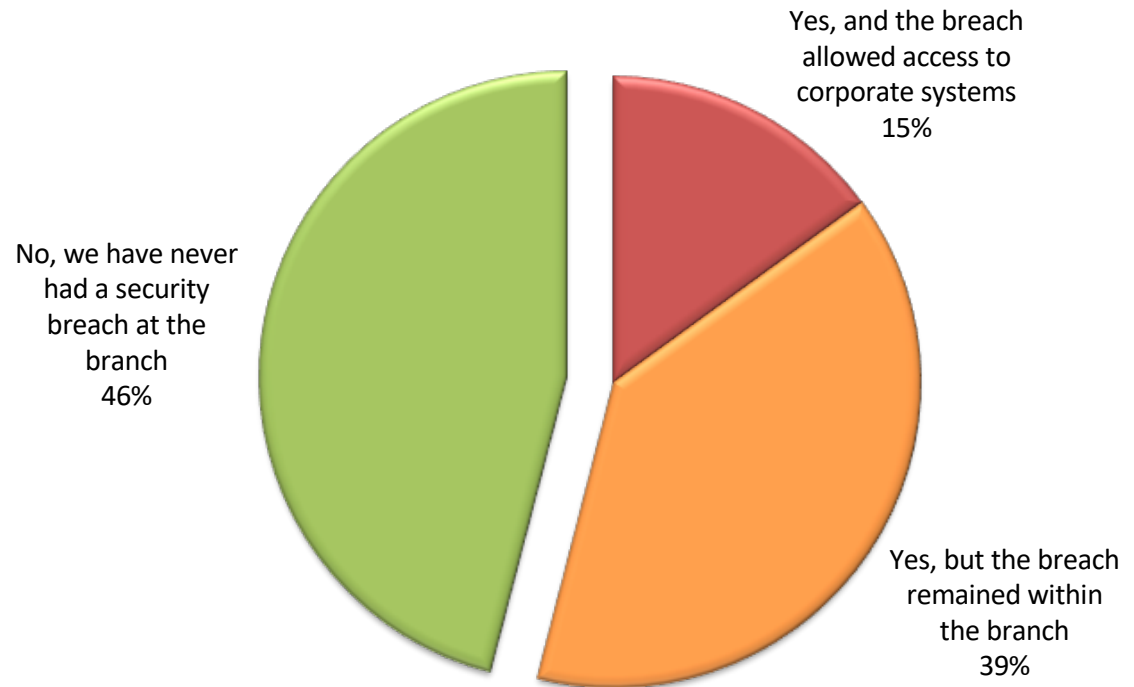
Growing Complexity Cited as Top Issue to Securing and Managing Branch Networks

Which of the following is the most challenging aspect of managing security in branch networks?



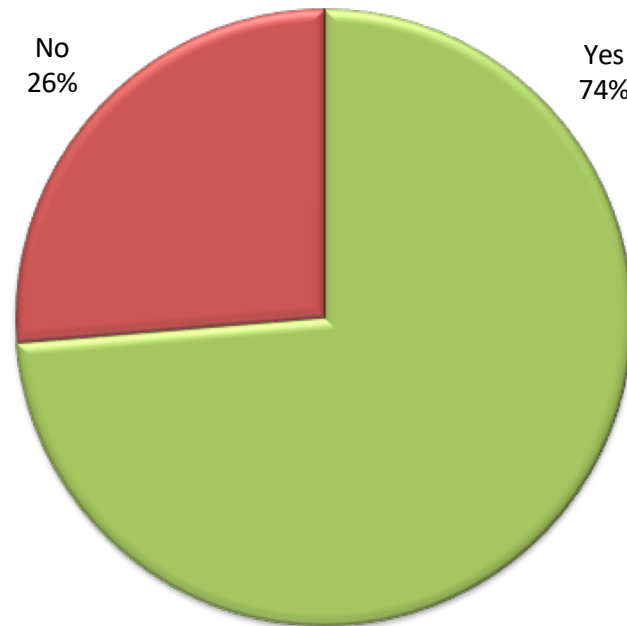
54% Admit a Security Breach at the Branch Network

Have you experienced a network security breach at the branch?



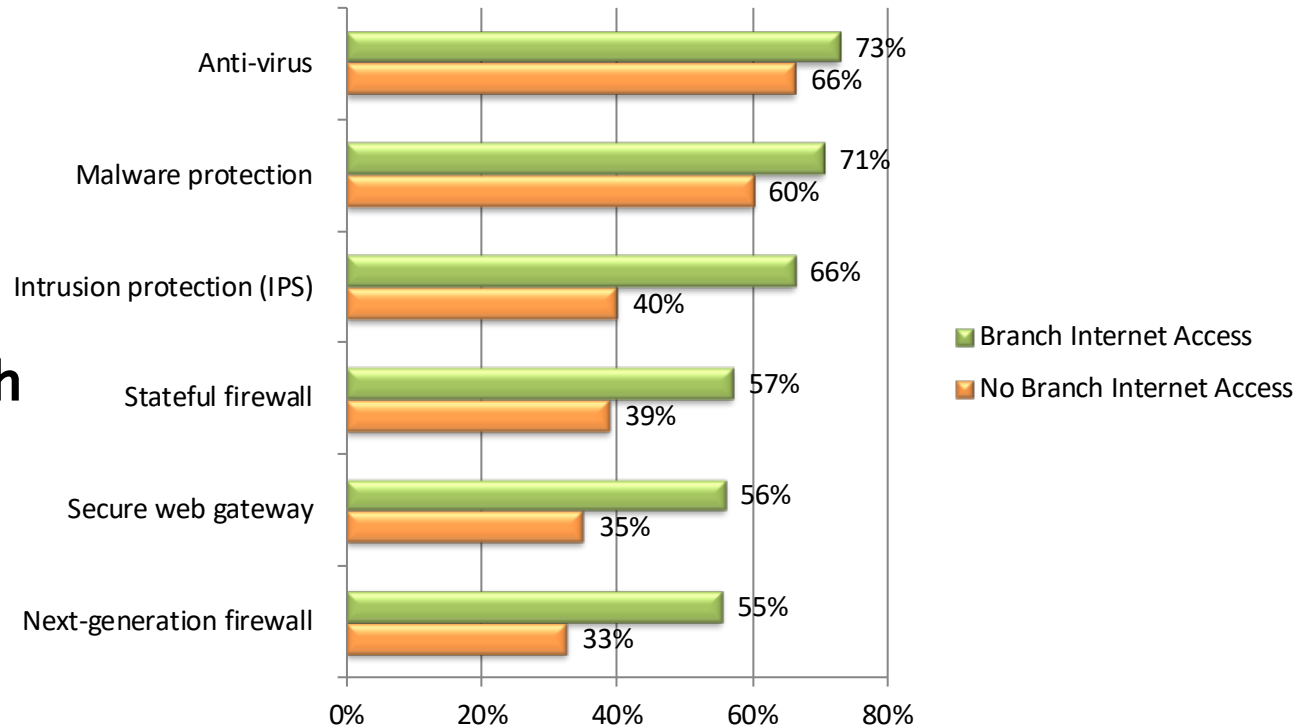
74% Provide Direct Internet Access at Branch Locations

Does your company have direct Internet access from a majority of branch offices today?



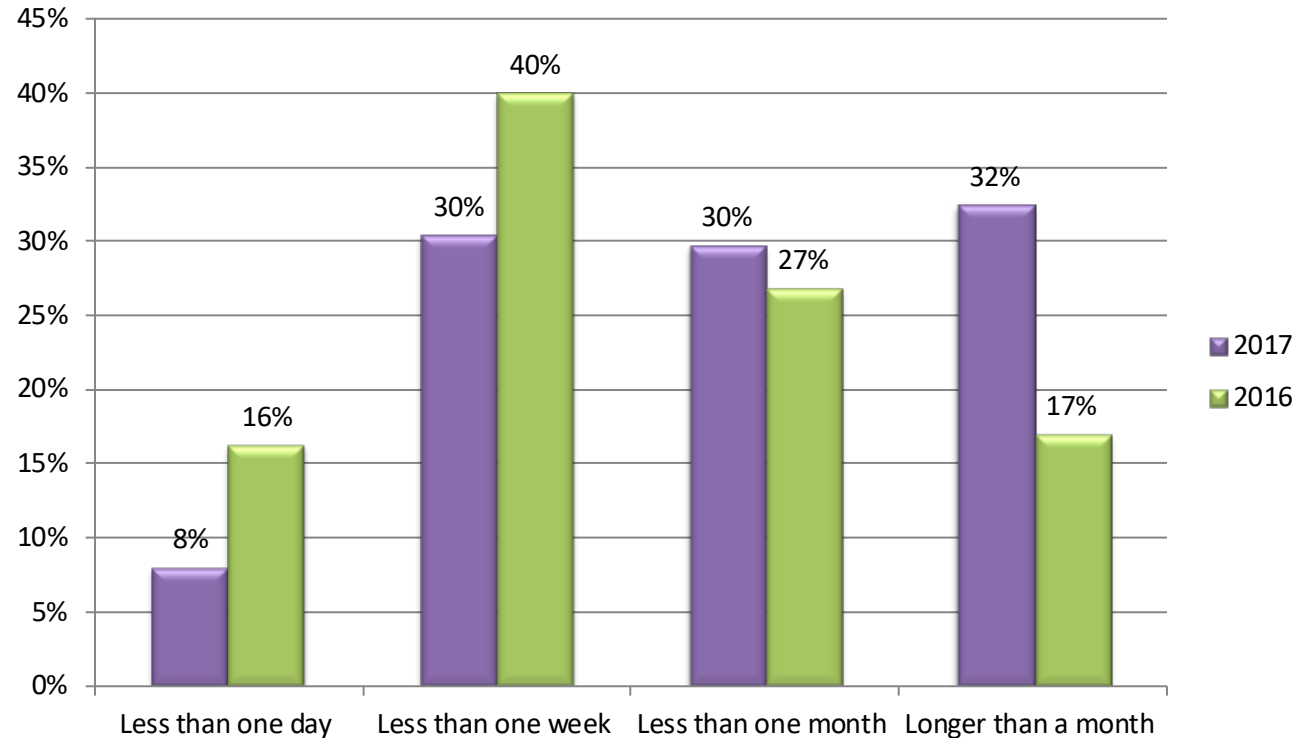
Those with Branch Internet Access Utilize Significantly More Security Solutions

Branch Internet Access vs. No Branch Internet Access



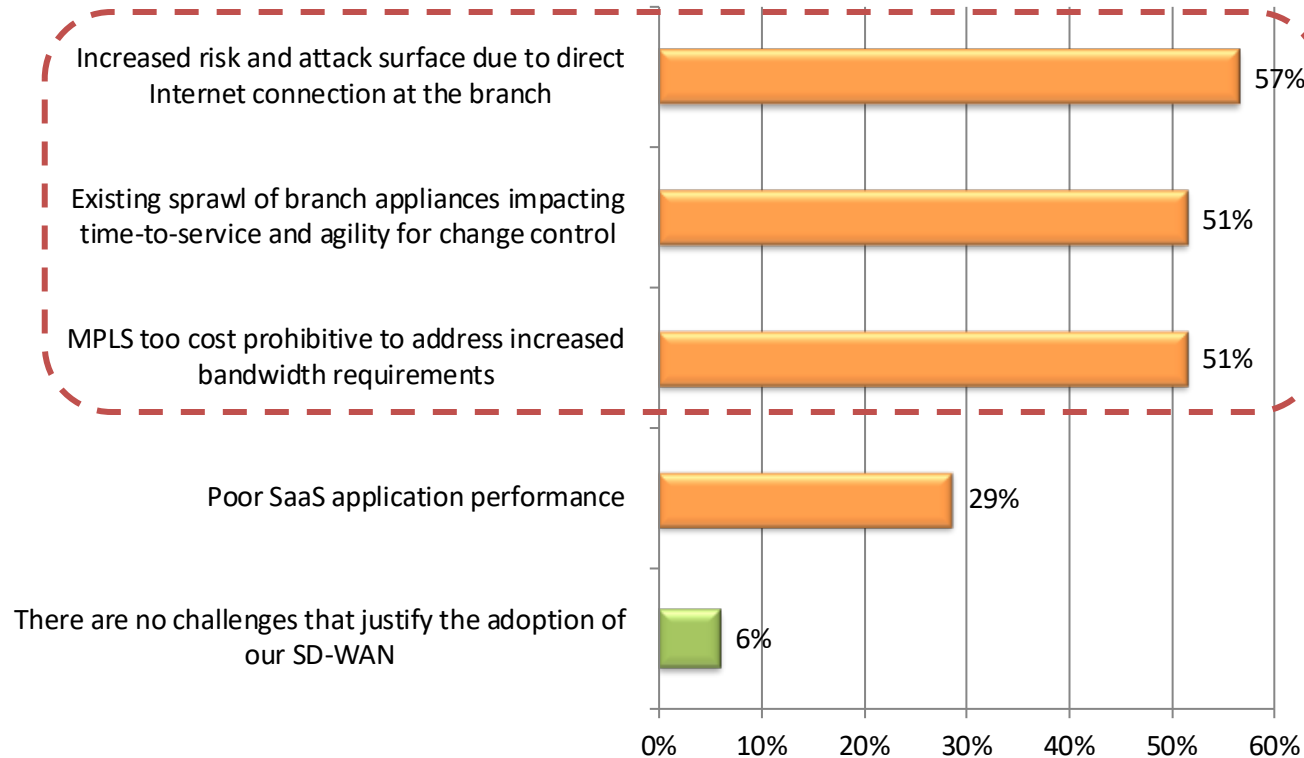
Time to Provision Branch Locations is Increasing

Approximately, how long does it take to provision a branch office WAN from start-to-finish (both hardware in the branch and connectivity)?



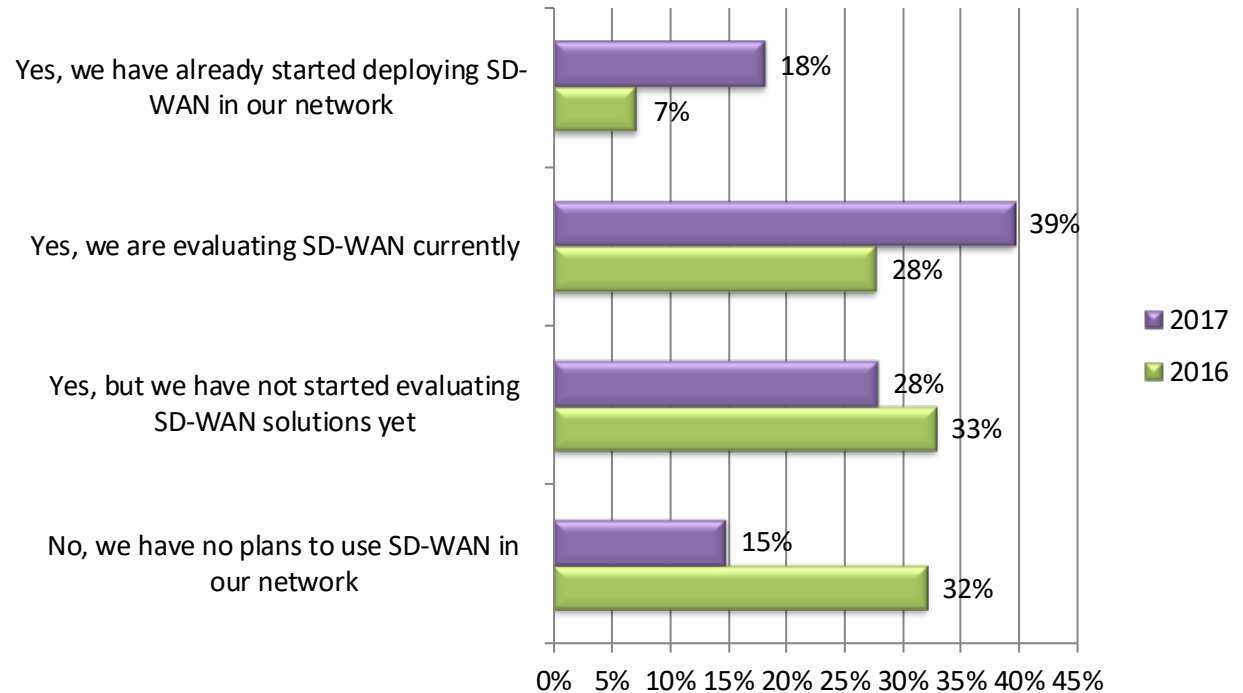
SD-WAN Being Selected to Reduce Risk, Manage Sprawl, and Reduce Costs

For your company, which of the following challenges are being used to justify the adoption of SD-WAN?



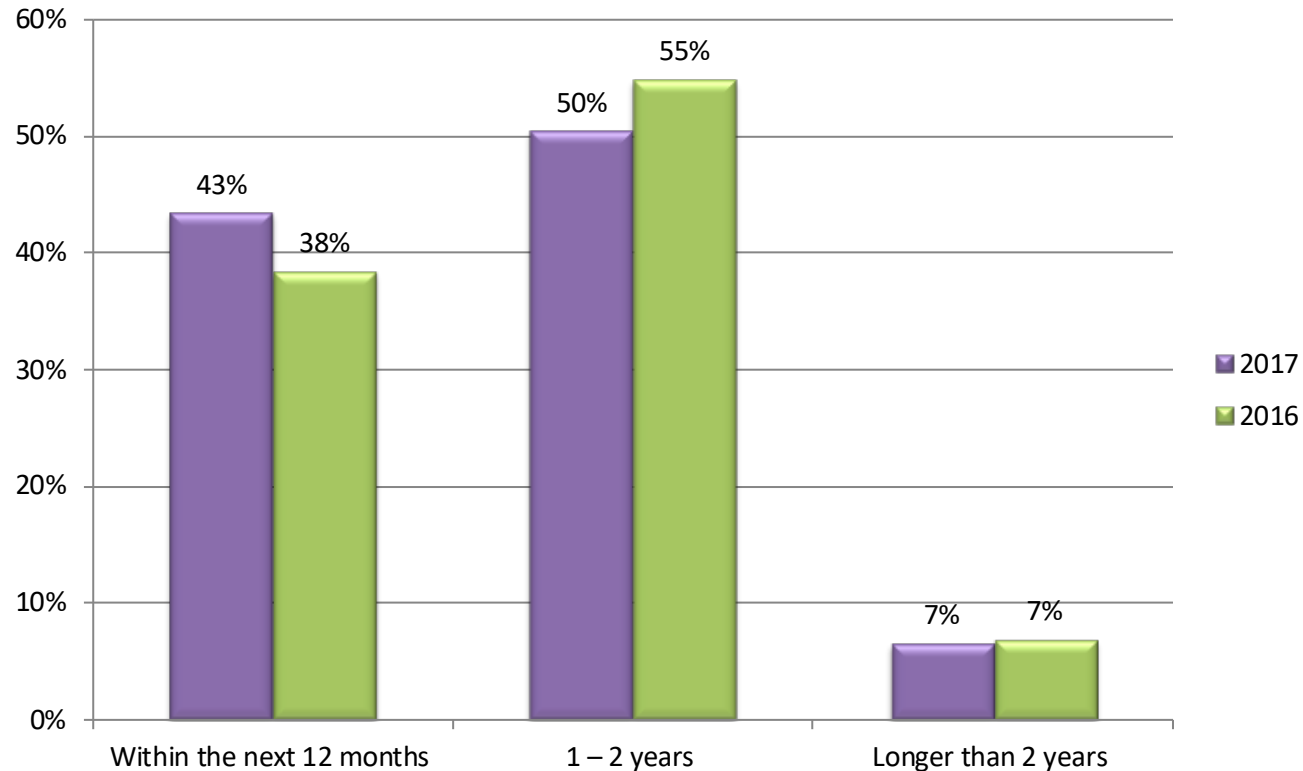
SD-WAN Adoption Has Accelerated with 85% Considering or Deploying SD-WAN

Is your company considering software-defined (SD) WAN solutions?



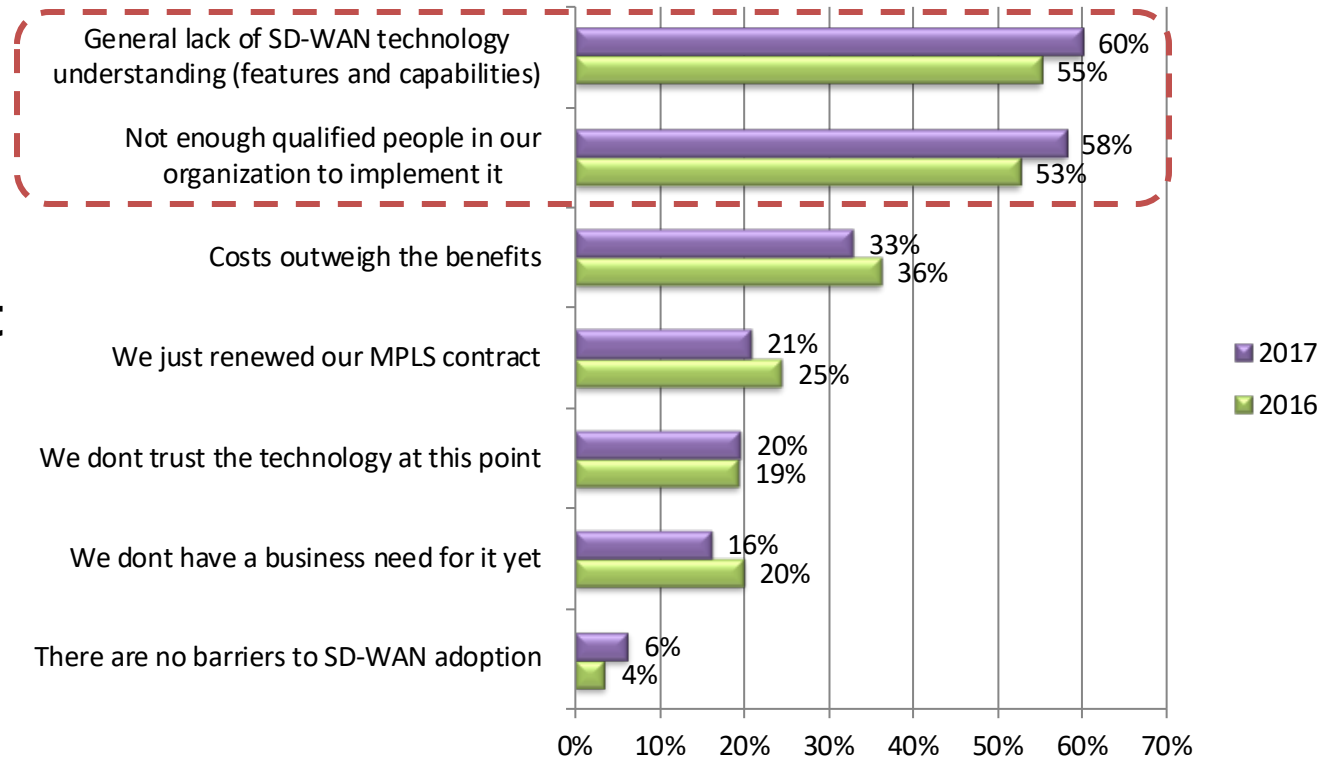
93% Will Have Deployed SD-WAN by the End of 2019

When do you anticipate deploying SD-WAN solutions?



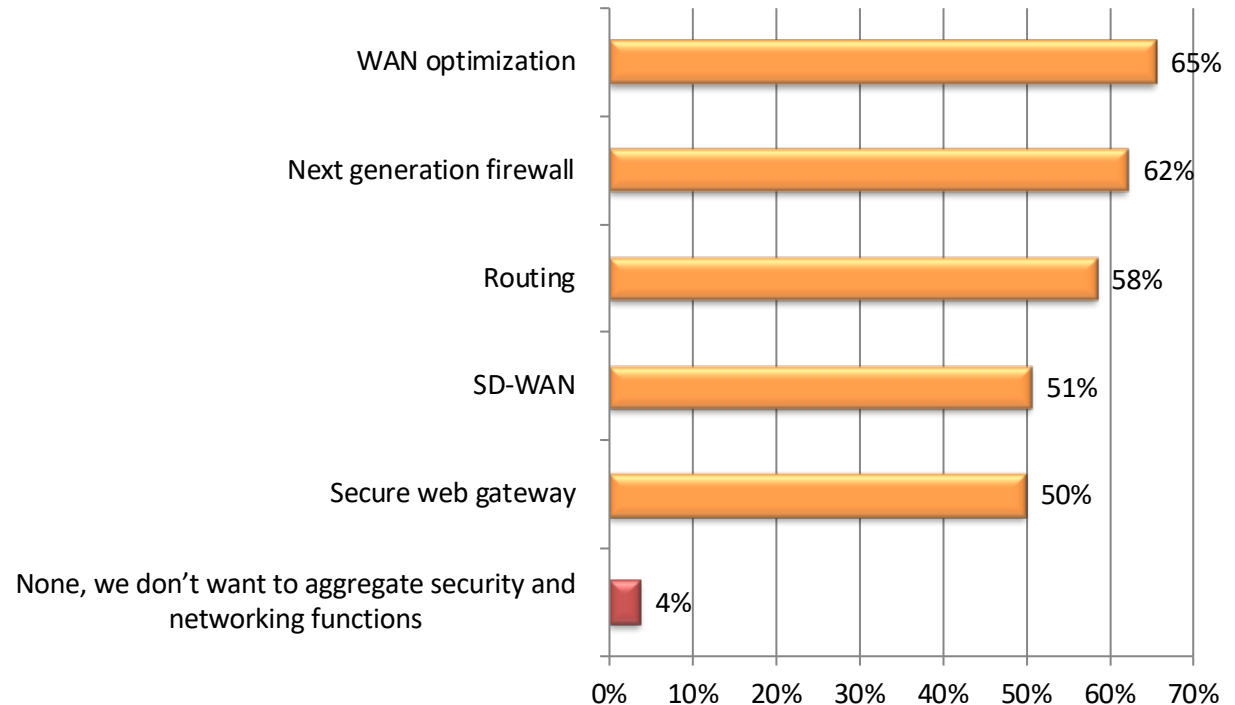
Lack of Education and Expertise Remain the Top Obstacles for SD-WAN Adoption

In your experience, what are the biggest barriers to SD-WAN adoption? Select up to 3 answers.



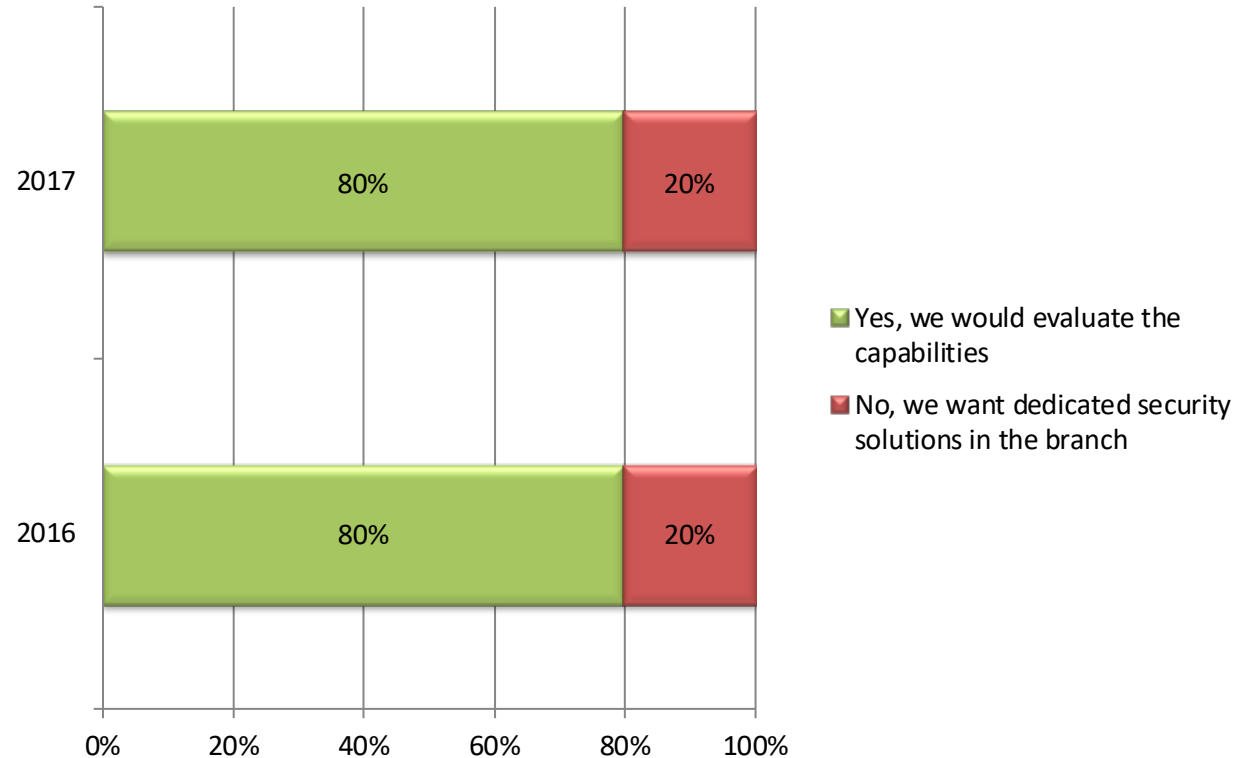
96% Indicated an Aggregated Approach for Networking and Security is Needed

Which branch connectivity network and security functions would you be willing to aggregate into a single platform?



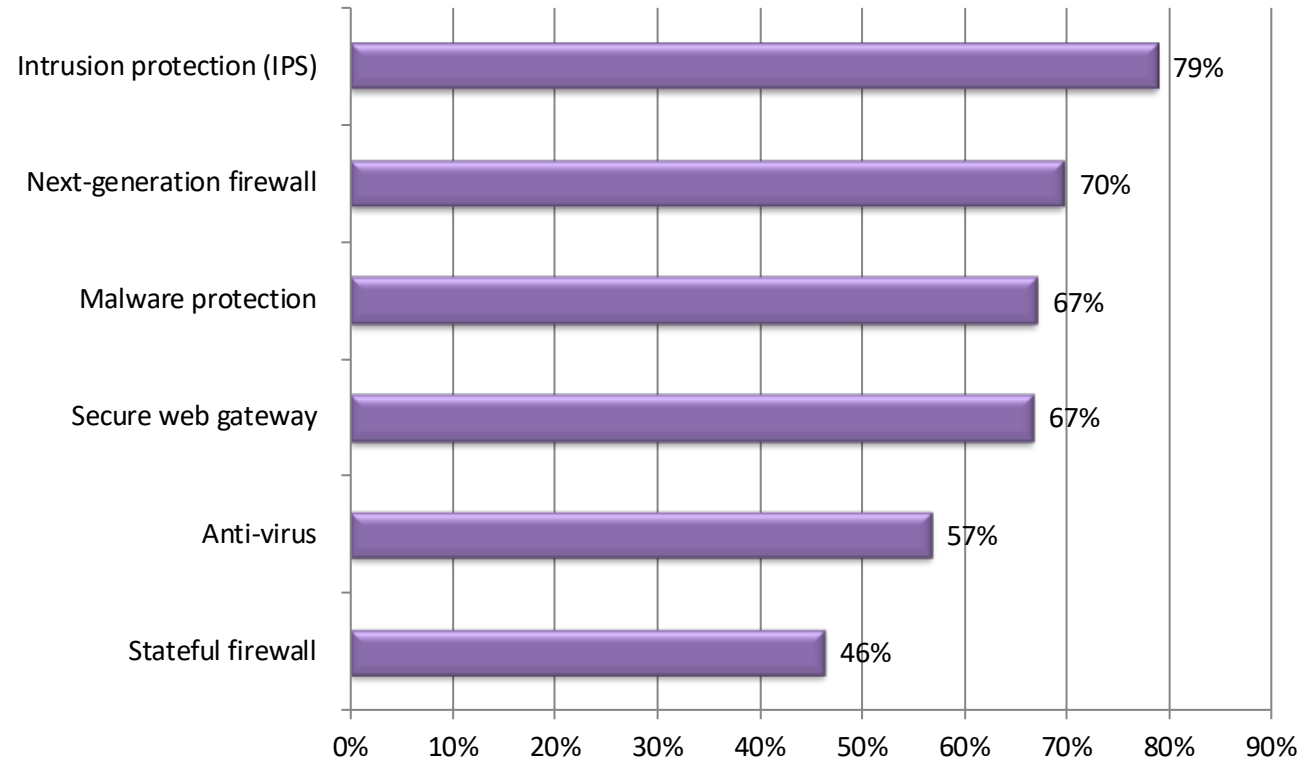
80% Continue to Want a Combined Network and Security Solution

Would your company consider an SD-WAN solution that includes certified, full-featured network security capabilities?



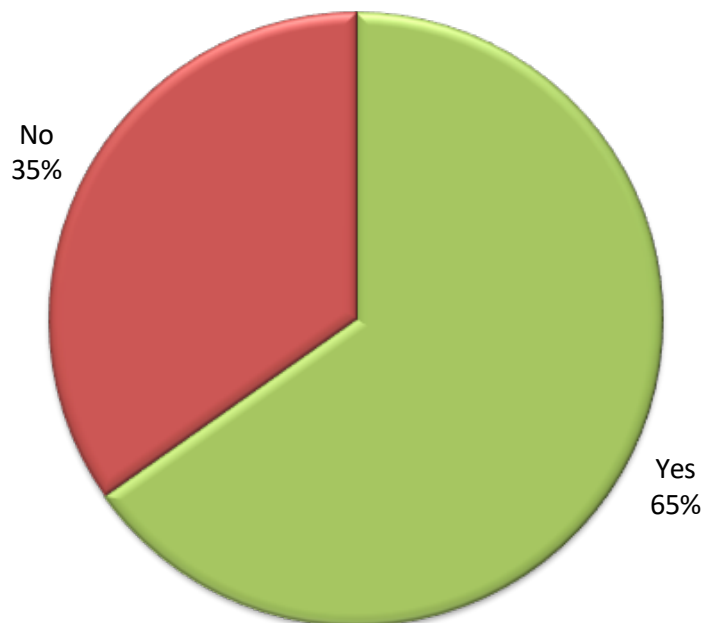
Typical Branch Security Capabilities Should be Built into SD-WAN Solutions

What key security functionality should be built into the SD-WAN solution?



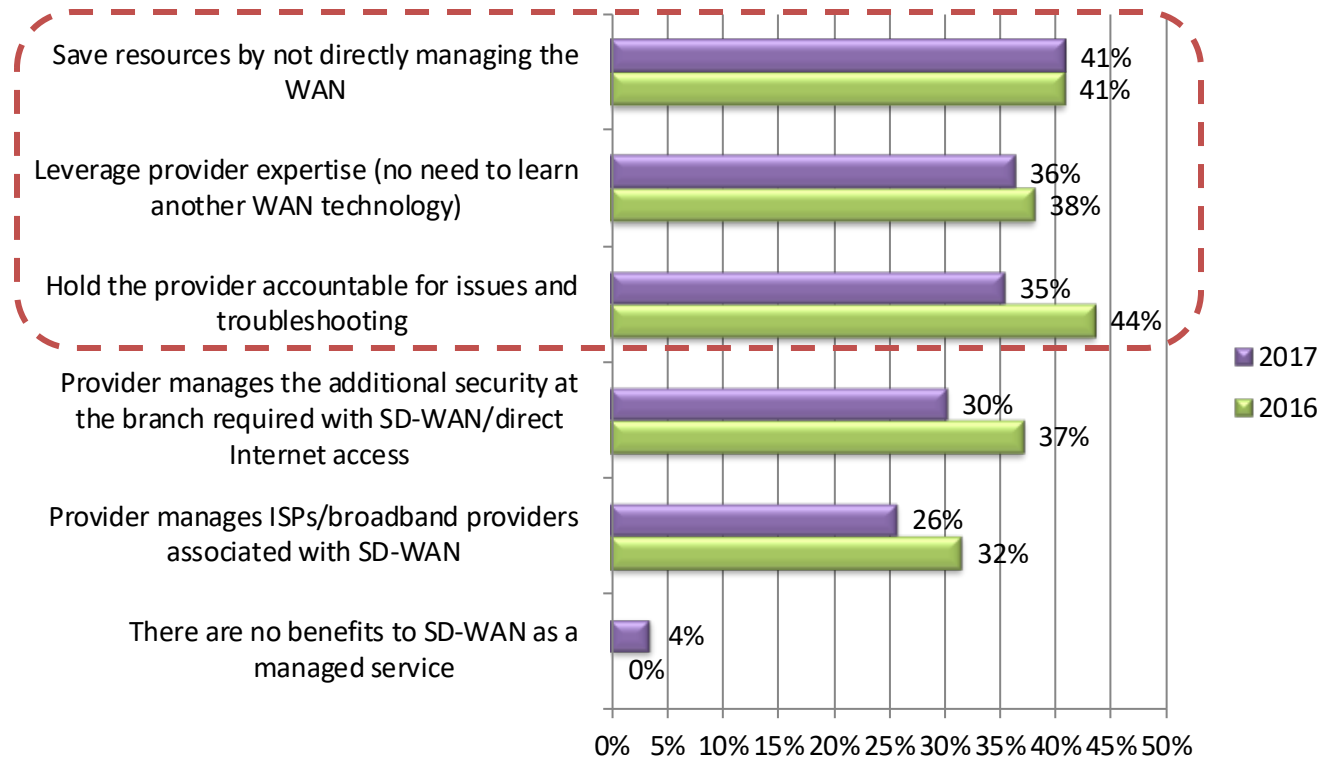
65% Consider a Managed SD-WAN Service

Has your company considered a managed SD-WAN service instead of a do-it-yourself enterprise product?



Saved Resources, Gained Expertise, and Accountability Expected from SD-WAN Managed Service

What benefits are expected from SD-WAN as a managed service? Please select the top 2 benefits.



METHODOLOGY AND PARTICIPANTS

Goals and Methodology

Research Goal

The primary research goal was to capture how companies managed and secured their network across branch locations. The research also investigated expected benefits and challenges of a software-defined WAN (SD-WAN) and reveal trends when compared to a similar survey conducted in 2016.

Methodology

Network professional users worldwide were invited to participate in a survey on the topic of managing and securing the WAN.

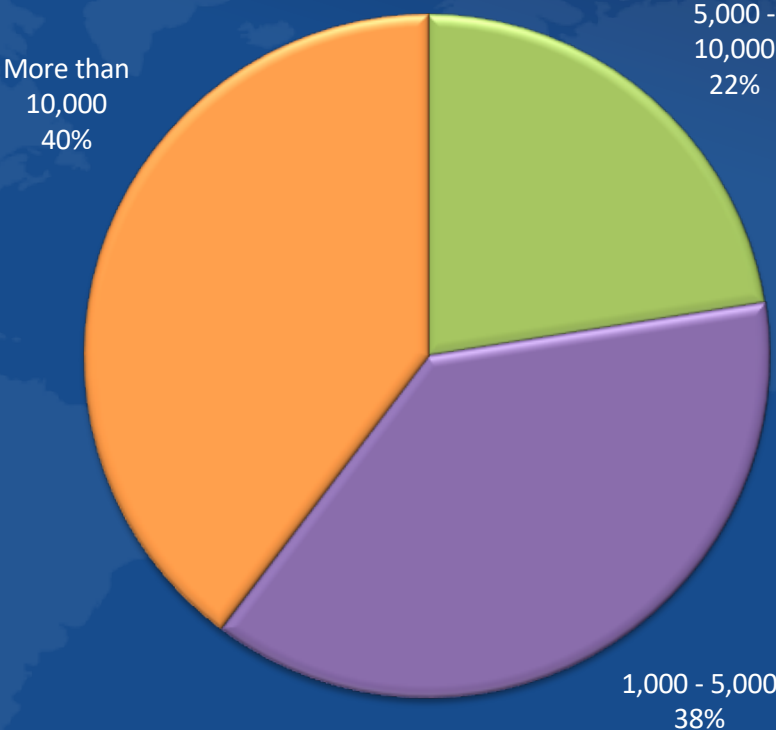
The survey was administered electronically and participants were offered a token compensation for their participation.

Participants

A total of 309 participants that have network responsibilities completed the global survey in 2017 and 308 completed a similar survey in 2016. Participants represented each of the five continents.

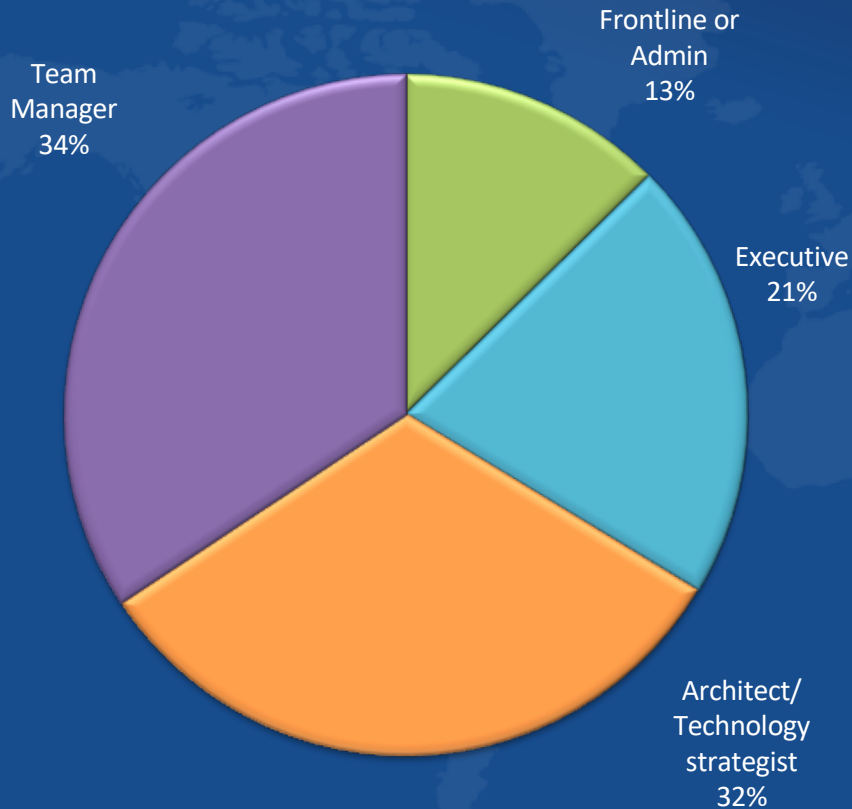
Companies Represented

Company Size

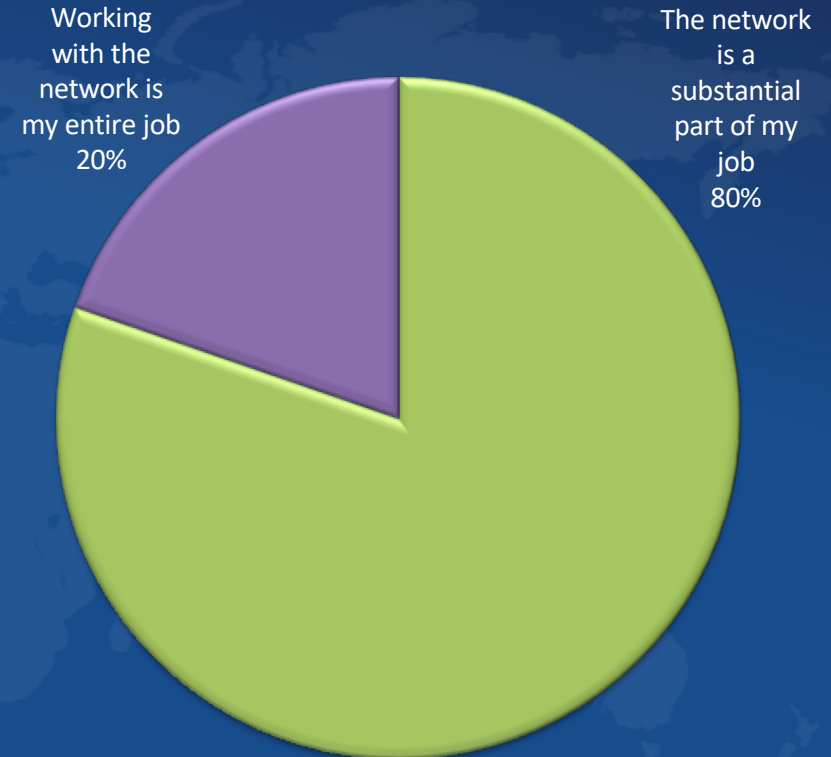


Participant Demographics

Role

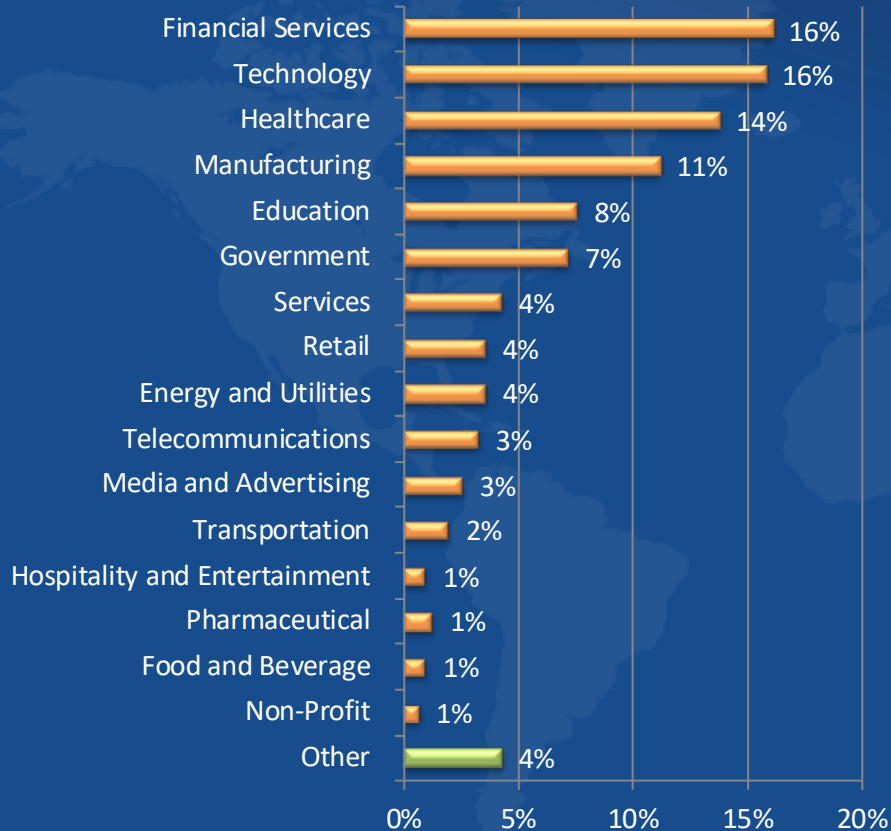


Networking Responsibilities

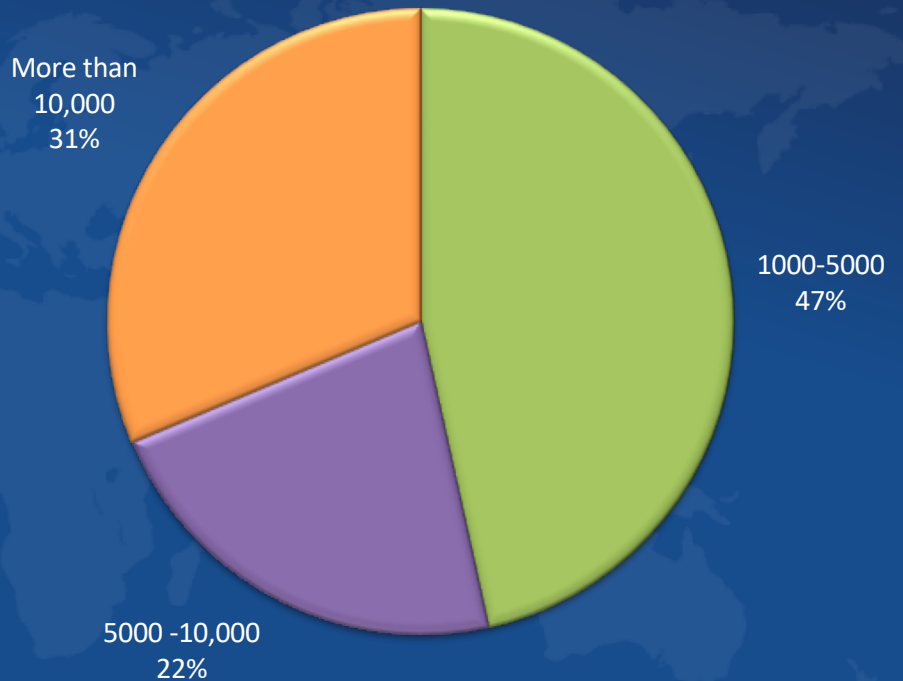


Companies Represented (2016)

Industry

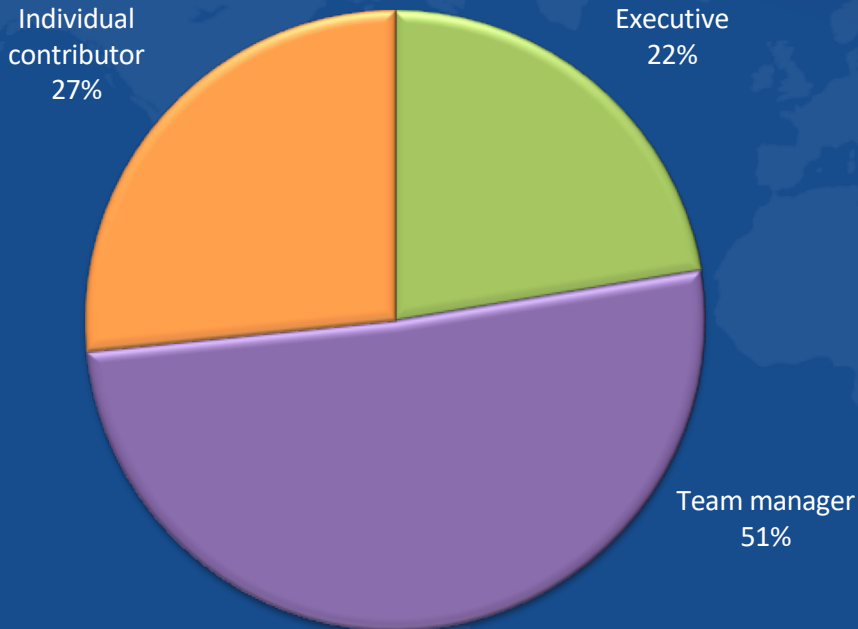


Company Size

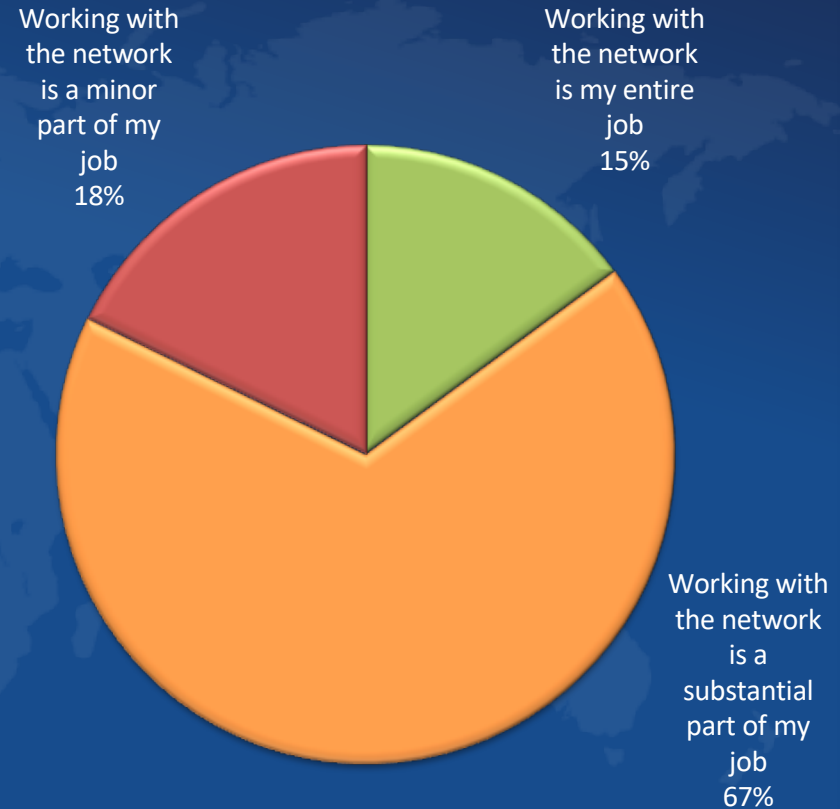


Participant Demographics (2016)

Role



Networking Responsibility



For more information...

About Dimensional Research

Dimensional Research provides practical marketing research to help technology companies make smarter business decisions. Our researchers are experts in technology and understand how corporate IT organizations operate. Our qualitative research services deliver a clear understanding of customer and market dynamics.

For more information, visit www.dimensionalsearch.com.

About Versa Networks

Founded by network industry veterans, Versa Networks is an innovative vendor of software-defined WAN (SD-WAN) and security (SD-Security). Versa provides a unique and carrier-grade SD-WAN and SD-Security solution that is purely software- and NFV-based, and fully multi-tenant. The solution provides a wide range of virtualized networking and security functions that can be used to create highly scalable and high-value managed services that run on low-cost white box and x86 hardware. Versa SD-WAN and SD-Security are deployed by Tier 1 and 2 providers around the world, as well as several large enterprises. The company is backed by premier venture investors Sequoia, Mayfield, and Verizon Ventures.

For more information, visit <http://www.versa-networks.com>.