Approaches to Network Visibility and Security in Healthcare

Gigamon®

Summary Results | June 2021

SURVEY SUMMARY

Between April and May 2021, Gatepoint Research invited selected IT/IS and IT Security executives to participate in a survey themed *Approaches to Network Visibility and Security in Healthcare.*

▶ Candidates were invited via a multi-channel approach and 100 executives have participated to date.

▶ Management levels represented are all senior decision makers and influencers:
- 12% hold the title CXO or are VPs
- 20% are Directors
- 36% are Managers
- 14% are Engineers
- 18% are Architects, Analysts, or Network Administrators

▶ Survey participants represent organizations related to the healthcare industry exclusively.

▶ 100% of responders participated voluntarily; none were engaged using telemarketing.

GATEPOINT RESEARCH
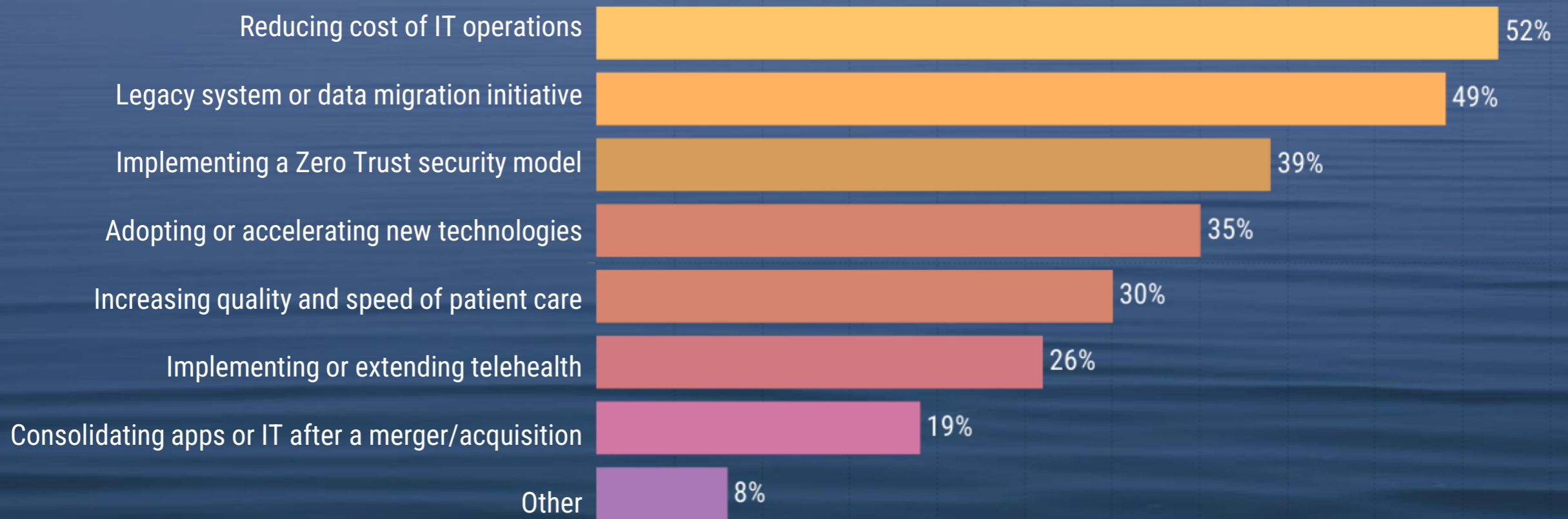PulseReport

EXECUTIVE OVERVIEW

Healthcare providers, in light of incredible challenges over the last 18 months to provide care in the face of the pandemic, must also ensure that they have end-to-end visibility across their physical, virtual and hybrid cloud network. Besides absolute cybersecurity, they must also ensure network and business continuity. As they move to the cloud, what are these professionals doing to ensure networks, patients, and employees can continue to rely on the infrastructure?

This survey asks respondents to report:

- Where are they in their journey to the cloud? What barriers are they facing along the way?

- How many tools are they using for security and network monitoring? Do they have any visibility or security challenges?

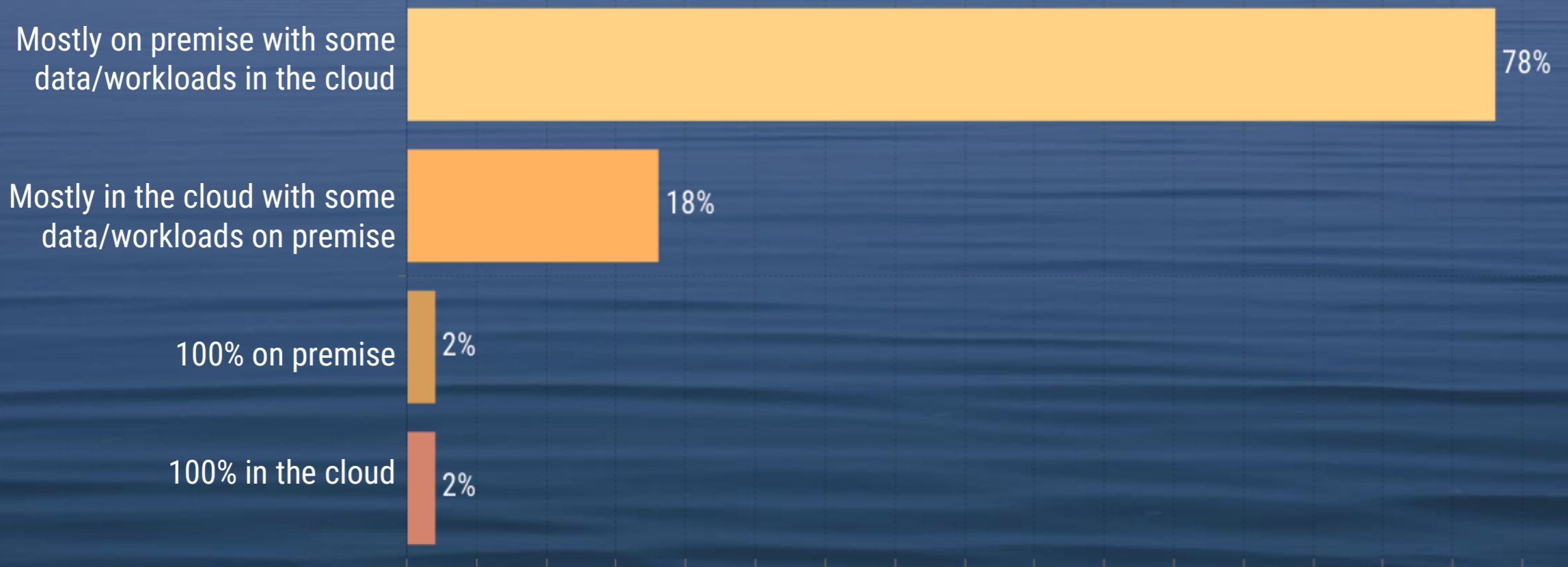- What capabilities will they consider when evaluating network security and performance solutions?

GATEPOINT RESEARCH
PulseReport

What's top of mind for you this year?

- Reducing cost of IT operations — 52%
- Legacy system or data migration initiative — 49%
- Implementing a Zero Trust security model — 39%
- Adopting or accelerating new technologies — 35%
- Increasing quality and speed of patient care — 30%
- Implementing or extending telehealth — 26%
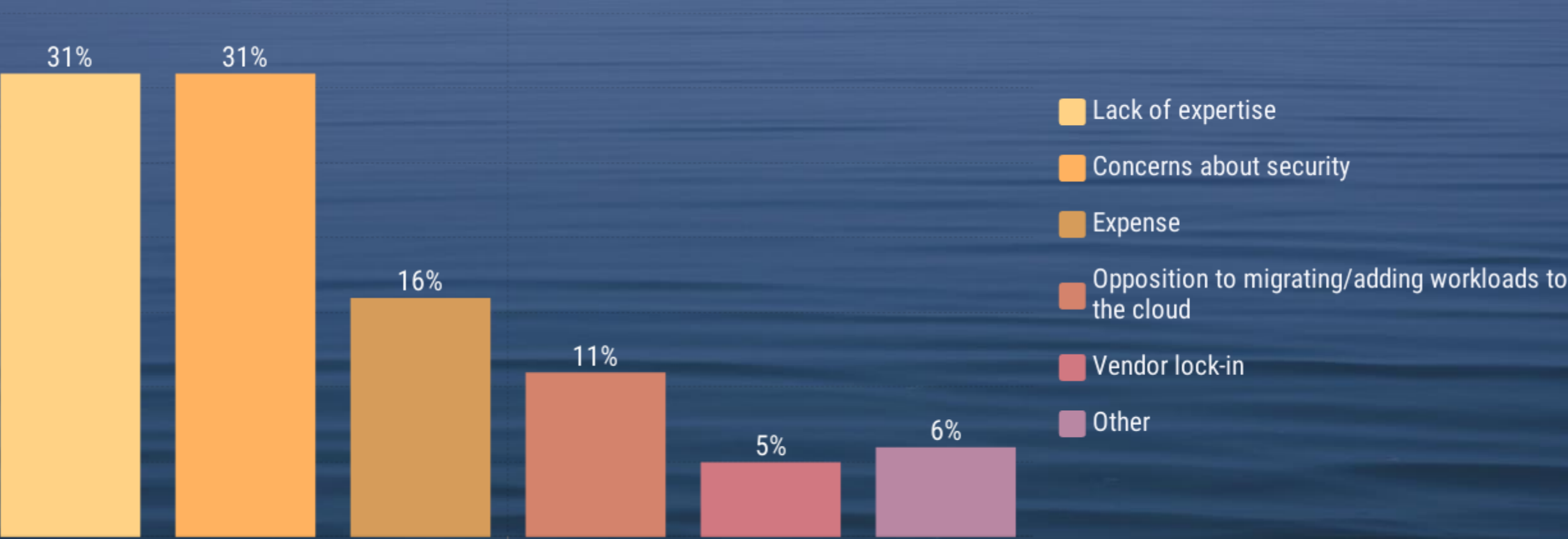- Consolidating apps or IT after a merger/acquisition — 19%
- Other — 8%

IT operational costs must come down, say 52% of respondents, and the next most cited 'top of mind' area is migrating legacy systems or data (49%). More than a third are focused on implementing a Zero Trust model (39%), and/or either adopting or accelerating new technologies (35%).

Summary Results | June 2021

GATEPOINT RESEARCH
PulseReport

Where are you in your journey to the cloud?

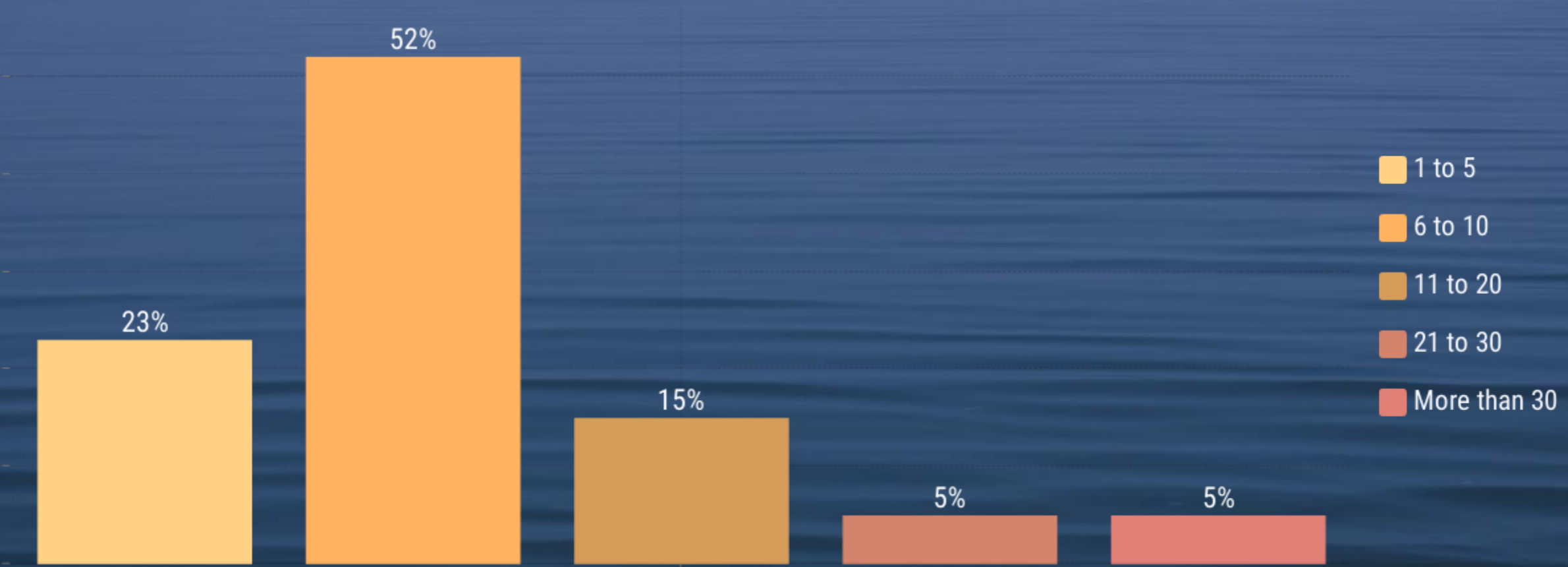| Category	Percentage
Mostly on premise with some data/workloads in the cloud	78%
Mostly in the cloud with some data/workloads on premise	18%
100% on premise	2%
100% in the cloud	2%

All but 4% of those surveyed report they are mid-journey to the cloud, with 78% mostly on premise, and 18% mostly in the cloud.

Summary Results | June 2021

What has been your biggest cloud migration challenge or barrier?

31% — Lack of expertise
31% — Concerns about security
16% — Expense
11% — Opposition to migrating/adding workloads to the cloud
5% — Vendor lock-in
6% — Other

Lacking expertise or concerns about security are the biggest bumps in the road on their journey to the cloud, say 31% of survey participants.

Summary Results | June 2021

GATEPOINT RESEARCH
PulseReport

How many tools are you using for security and network monitoring?

23%

52%

15%

5%

5%

Legend:
- 1 to 5
- 6 to 10
- 11 to 20
- 21 to 30
- More than 30

More than half of respondents report using six to ten tools for security and network monitoring, with 10% using more than 20!

Summary Results | June 2021

GATEPOINT RESEARCH
PulseReport

What are your network visibility and security challenges?
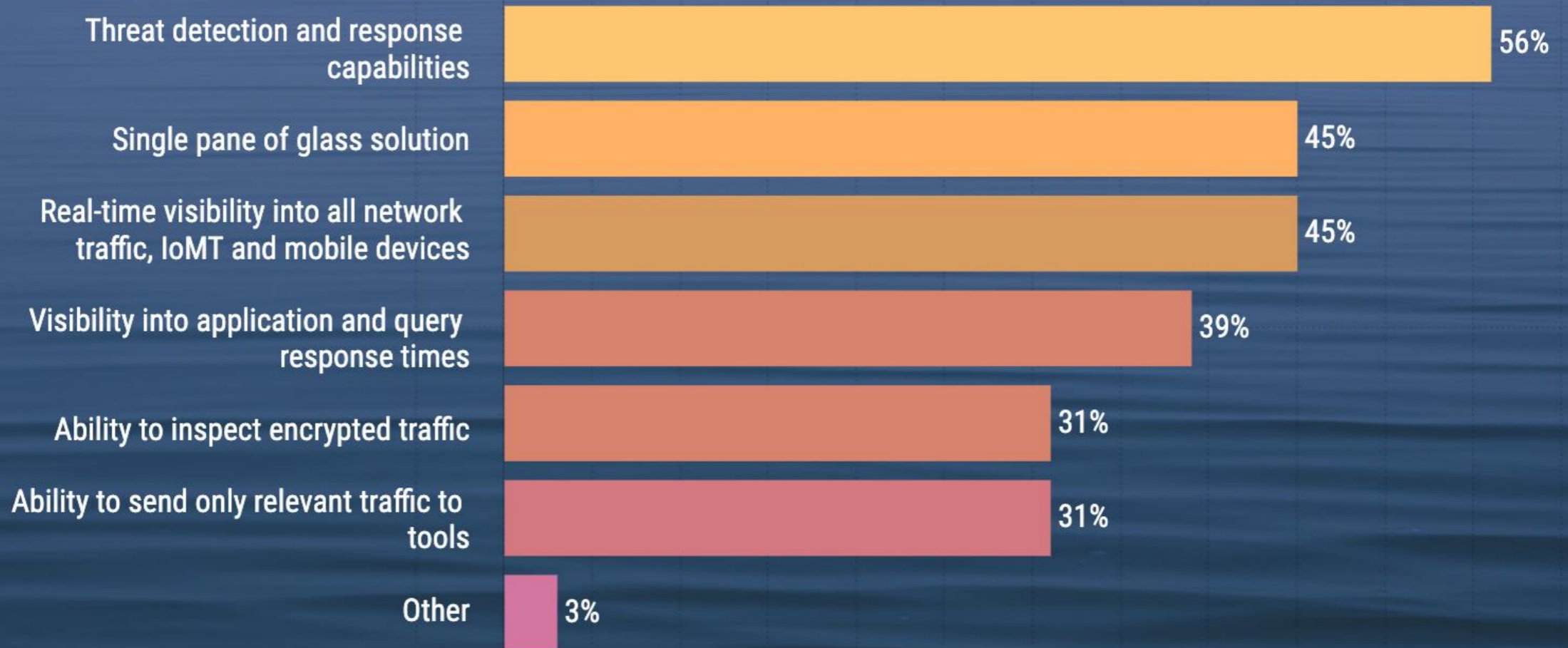
Challenge	Percentage
Increasing complexity across physical, virtual and/or cloud environments	62%
Increased volumes of traffic and data flowing across the network	41%
Blind spots (lack of visibility into traffic) on the entire network	36%
Difficulty hiring and retaining experienced IT security professionals	33%
Needing to support IoMT devices and mobile-based apps	30%
Outdated systems	30%
Performance challenges; network uptime and reliability	24%
Other	3%

62% of respondents say visibility is becoming increasingly complex across multiple environments, posing the biggest challenge for them.

Other challenges cited by a third or more include increased volumes of traffic and data (41%), blind spots (36%), and hiring/retaining skilled professionals (33%).

Summary Results | June 2021

GATEPOINT RESEARCH
PulseReport

What capabilities would support your organization's investment in new tools and solutions?

Capability	Percentage
Threat detection and response capabilities	56%
Single pane of glass solution	45%
Real-time visibility into all network traffic, IoMT and mobile devices	45%
Visibility into application and query response times	39%
Ability to inspect encrypted traffic	31%
Ability to send only relevant traffic to tools	31%
Other	3%

Being able to better detect and respond to threats is the #1 reason 56% of respondents' organizations would invest in new tools and solutions.

Summary Results | June 2021

GATEPOINT RESEARCH
PulseReport

What is most important to consider when evaluating network security and performance solutions?

| Category	Percentage
Improved/Increased efficiencies	73%
Streamlined compliance	44%
Cost savings	41%
Tool consolidation	40%
User experience/satisfaction	34%
Return on Investment	32%
Other	2%
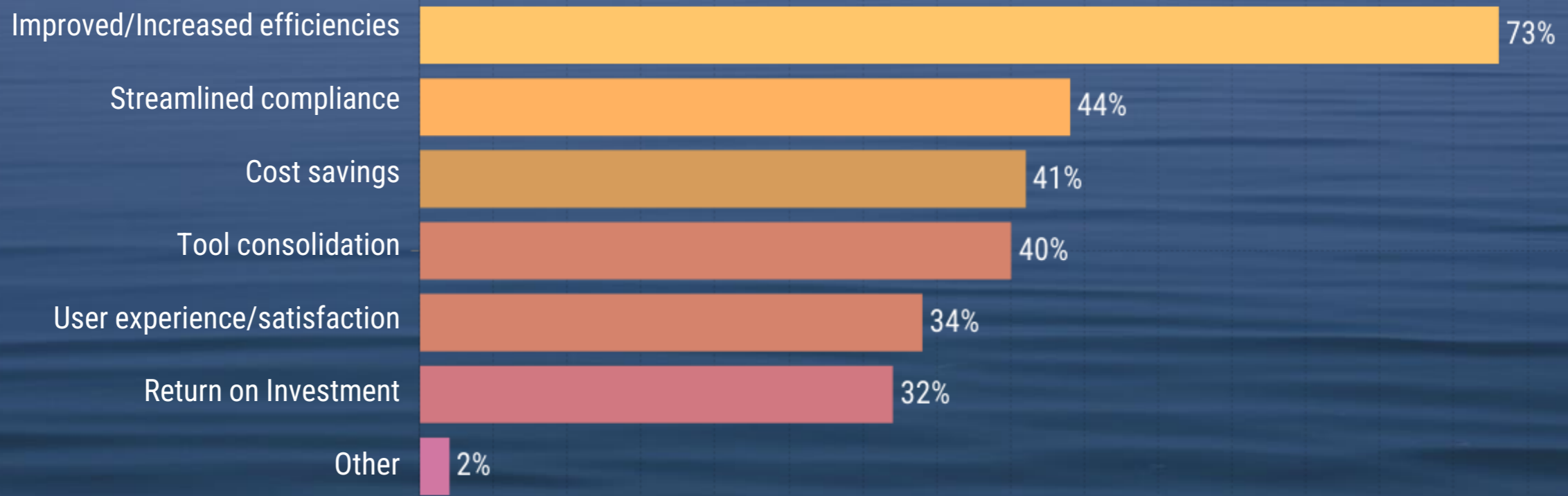
As responding organizations begin to evaluate network security and performance solutions, 73% say they will look to improve/increase efficiencies. 40% or more will concentrate on these areas: streamlined compliance (44%), cost savings (41%), and/or tool consolidation.

Summary Results | June 2021

GATEPOINT RESEARCH
PulseReport

JOB LEVEL

32% of survey respondents hold director or executive level positions in their organization. The remaining majority are a combination of front-line managers and practitioners.

■ CxO	5%
■ VP	7%
■ Director	20%
■ Manager	36%
■ Architects, Analysts, Network Admins	18%

GATEPOINT RESEARCH
PulseReport
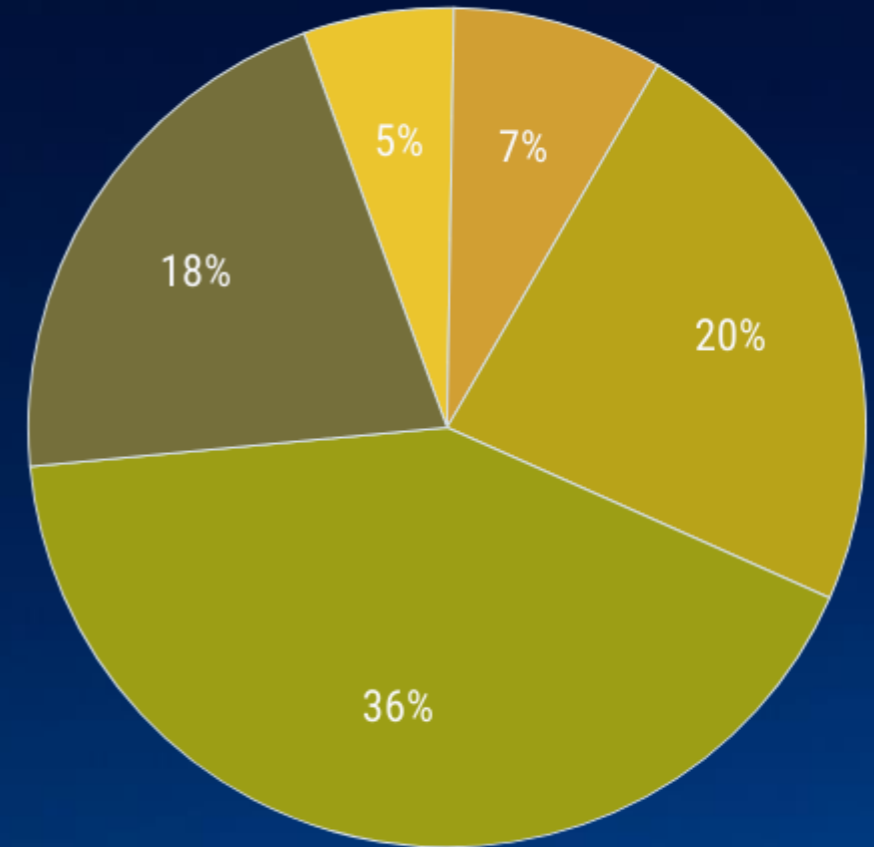
Gigamon®

Gigamon, a trusted partner of hundreds of hospitals, healthcare providers and insurers worldwide, provides the network availability, visibility and security they need to deliver high quality and secure patient care. Using Gigamon, leading healthcare organizations are able to ensure that their NetOps and InfoSec teams are more efficient and can focus on ensuring 24/7 availability and security no matter how much stress is placed on their network.

Learn more at gigamon.com

GATEPOINT RESEARCH
PulseReport