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Top 5 Trends in Security Vendor Consolidation

Security and risk management leaders are increasingly dissatisfied with the operational inefficiencies and the lack of integration of a heterogenous security stack. Buyers are now looking for more efficient and integrated solutions, rather than point security products.

1 Security vendor consolidation is accelerating.[1]

75% of respondents' organizations are **pursuing a vendor consolidation strategy,** up from 29% in 2020.

57% of organizations are working with **fewer than 10 vendors** for their security needs.

Vendor consolidation can take a long time; nearly two-thirds of respondents say their organizations have been consolidating for three or more years.

2 Organizations are consolidating to improve security efficacy and team efficiency.

65% of organizations pursuing or planning to pursue consolidation **expected to improve their overall risk posture.**

However, of those who have/are pursuing vendor consolidation, the biggest drawback (for 24% of organizations) was a **reduction of risk posture as a result of their strategy.**

Build a business case for risk posture improvement as the primary goal, but be aware that a quarter of projects fail to achieve this outcome.

3 Consolidation isn't just about saving money.

Only 29% of respondents indicate vendor consolidation's primary benefit as **reduced spending on licensing:** the lowest ranked benefit.

Meanwhile, **increased spending is considered to be a drawback** of consolidation (15% of respondents), but not the biggest deficiency.

Cost optimization should not drive vendor consolidation. Organizations looking to optimize costs must reduce products, licenses and features, or renegotiate contracts.

4 SASE and XDR are opportunities for consolidation.[2]

More than 80% of organizations will have **completed XDR projects** by the end of 2023.

Nearly 70% of organizations will have **completed SASE projects** by the end of 2023.

XDR offers a consolidated threat detection, incident response and remediation, through increased visibility on networks, cloud, endpoints and other components.

5 SASE and XDR are distinct but integrated.

89% of organizations **want SASE and XDR to work together,** either by consolidating into a single provider (43%) or keeping them distinct, but integrated (46%).

Keeping SASE and XDR distinct from one another enables a balance of best-of-breed functionality while maintaining loosely coupled integration and focus for security staff.

Consolidate to improve security posture, but do not expect direct cost savings.

Plan at least **two years for consolidation** due to time constraints and incumbent vendor switching costs.

Anticipate vendor M&A disruption. The security market is **always consolidating, but never consolidated.**

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