



STATE OF APPLICATION SERVICES 2019



1,863 ASIA PACIFIC RESPONDENTS ACROSS 20 COUNTRIES



- 21% TECHNOLOGY
- 21% TELECOM/CSP
- 15% FINANCIAL SERVICES
- 13% DISTRIBUTION/SERVICES
- 12% MANUFACTURING
- 6% PUBLIC SECTOR
- 4% EDUCATION
- 2% HEALTHCARE

ASIA PACIFIC EXECUTIVE SUMMARY

87%

RESPONDENTS HAVE MULTI-CLOUD ARCHITECTURES, DRIVEN BY AN APP-FIRST METHODOLOGY, WITH SOME COUNTRIES IN ASIA PACIFIC HAVING MORE THAN 90% RESPONDENTS USING MORE THAN ONE CLOUD PROVIDER.

66%

OF ASIA PACIFIC RESPONDENTS CURRENTLY HAVE OR PLAN TO HAVE DIGITAL TRANSFORMATION PROJECTS, RAISING THE IMPORTANCE AND POSSIBILITIES OF BIG DATA AND REAL-TIME THREAT ANALYSIS.

60%

OF ASIA PACIFIC RESPONDENTS ARE ALREADY DEPLOYING ORCHESTRATION INITIATIVES TODAY - REFLECTING THAT BUSINESSES IN THE REGION ARE AHEAD OF THE AUTOMATION AND ORCHESTRATION GAME.

56%

OF ASIA PACIFIC RESPONDENTS ARE ALREADY EMPLOYING CONTAINERS TODAY, AS THE REGION ADOPTS NASCENT AND EMERGING TECHNOLOGIES AT IMPRESSIVE RATES.



EMBRACING DIGITAL TRANSFORMATION

DIGITAL TRANSFORMATION PROJECTS IN PLACE

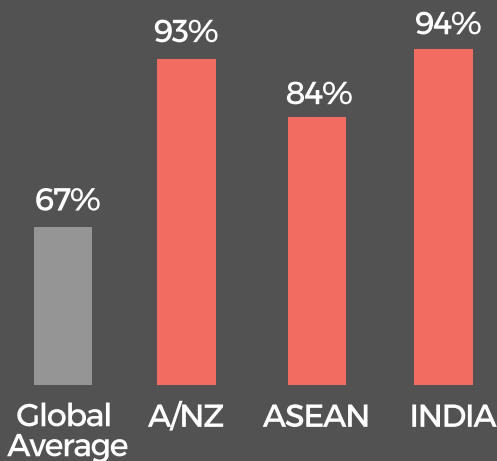


Figure 1 - Source: F5 | State of Application Services 2019

While digital transformation continues to be a significant strategic driver globally, organizations in Asia Pacific have diverse sentiments. Australia and New Zealand (A/NZ), ASEAN, and India are aggressively embracing the shift, while respondents from the other regions are further behind (Figure 1).

This new digital economy is changing the entire landscape of applications. We asked respondents to rank which strategic trends they felt would be important over the next 2-5 years. Their answers were clear: the future is all about analytics and machine learning. This was seen especially in regions that are leading in digital transformation initiatives, as they placed greater emphasis on big data and real-time threat analytics.



DIGITALIZATION: TWO FACES OF A COIN

IT'S CHANGING HOW WE DELIVER APPLICATIONS TO PRODUCTION ENVIRONMENTS (E.G. MORE FREQUENT RELEASES)

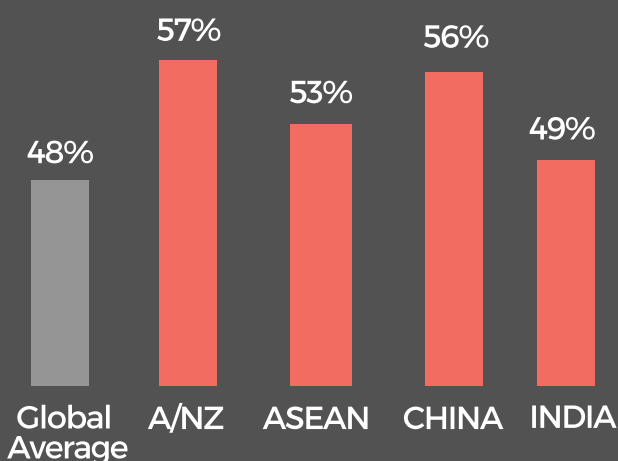


Figure 2 - Source: F5 | State of Application Services 2019

Organizations are reaping the benefits of their digital transformation projects, as the market moves rapidly to a digital business. Automation and orchestration (60%) are becoming more prominent across IT systems and processes, while also changing how organizations deliver applications (Figure 2).

However, digitalization has also resulted in tremendous pressure for both the application and infrastructure teams. In order to keep up with the rapid rate of change required to keep applications customer-centric and drive revenue, organizations are ramping up their use of technologies that provide deeper insights, deliver faster release cycles, while ensuring high availability.



THE GROWING CONCERNS: PERFORMANCE & SECURITY

CHALLENGES IN MULTI-CLOUD DEPLOYMENTS

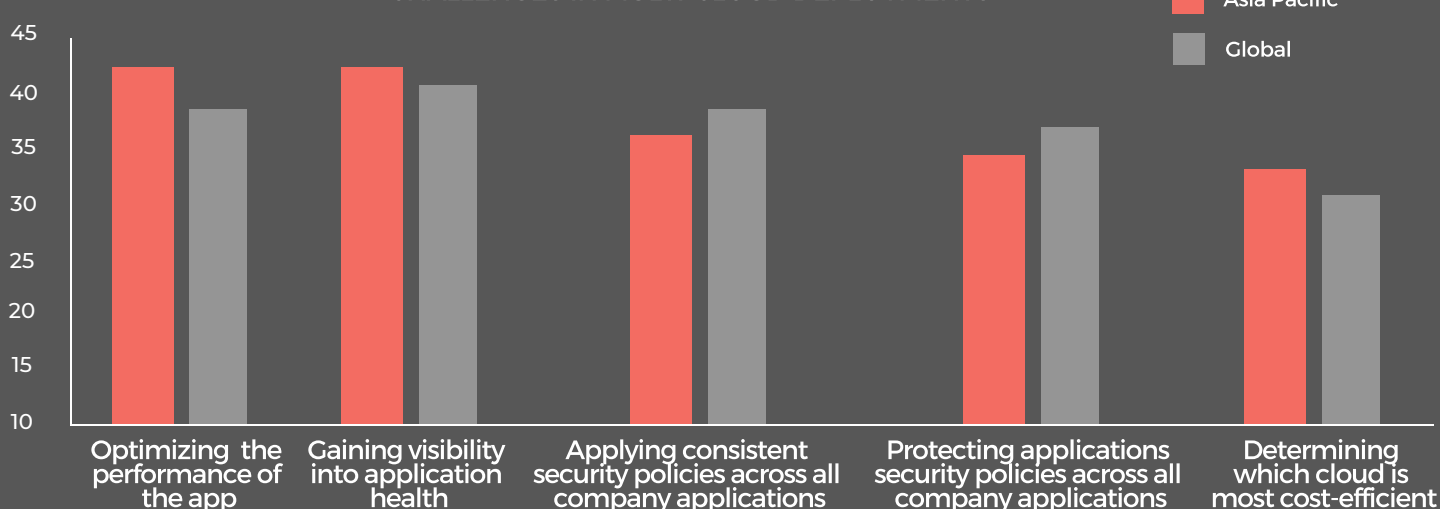


Figure 3 - Source: F5 | State of Application Services 2019

Applications are at the heart of organizations, with 87% of Asia Pacific organizations deploying applications in a multi-cloud environments. However, challenges remain. Similar to last year, security, optimizing performance and gaining visibility into application health were cited as the top concerns when deploying multi-cloud in Asia Pacific (Figure 3). This is especially the case for security, with only 34% of Asia Pacific respondents being confident of their ability to withstand an application-layer attack.



THE RISE OF AUTOMATION: SELF-SERVICE INFRASTRUCTURE IS HERE TO STAY

HAVE SELF-SERVICE INFRASTRUCTURE (EITHER TESTING OR FULLY OPERATIONAL)

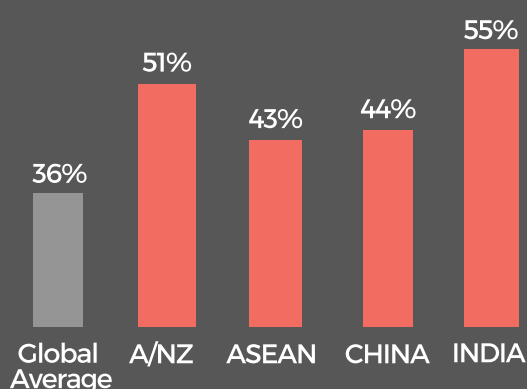


Figure 4 - Source: F5 | State of Application Services 2019

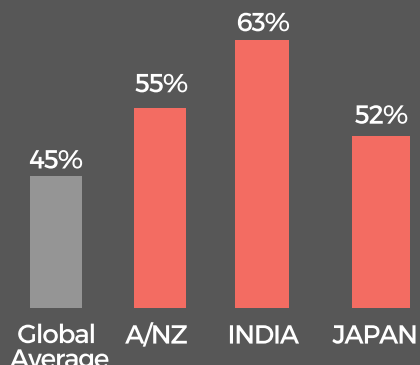
It seems that the automation and orchestration of development and deployment pipelines associated with DevOps is no longer about getting ahead—it's merely about keeping up. However, the good news is that organizations are not only starting to keep up, but have plans to really move forward. More than one-third have automated all four key components of the production pipeline: app infrastructure, app services, networking, and security.

Additionally, it is worth noting that more organizations in Asia Pacific are piloting or have a fully operational self-service infrastructure, as compared to 36% globally (Figure 4). It is not surprising to see A/NZ and India lead in this area, given that over 90% of the respondents from these regions are engaged in ongoing digital transformation initiatives (Figure 1).



DIGITAL TRANSFORMATION: GOING BEYOND TRENDS TO REAP BENEFITS

NEW BUSINESS OPPORTUNITIES FROM DIGITAL TRANSFORMATION PROJECTS



COMPETITIVE ADVANTAGE FROM DIGITAL TRANSFORMATION PROJECTS

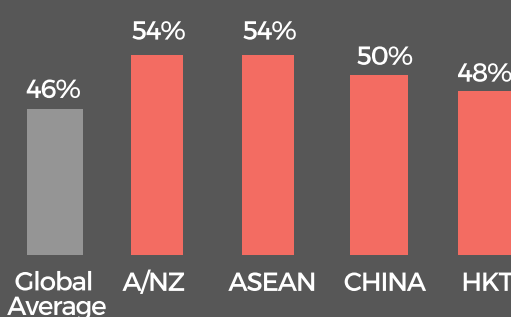


Figure 5 - Source: F5 | State of Application Services 2019

Common to all geographies is the desire to optimize IT and business processes, as well as enjoy employee productivity improvements from digital transformation—with 63% of respondents deploying automation and orchestration initiatives. Interestingly, in addition to internal-facing benefits, respondents in Asia Pacific are placing significant emphasis on external-facing benefits such as creating new business opportunities or generating a competitive advantage from digital transformation as compared to their counterparts (Figure 5).

In order for organizations to reap the full rewards of digital transformation, it is imperative to evaluate processes, workflows, and organizational structures to prepare for the onslaught of change to come.