

The Forrester logo is positioned in the top left corner of the page. It consists of the word "FORRESTER" in a dark green, serif typeface, with a registered trademark symbol (®) to its upper right. The background of the slide features a dark, blurred image of computer monitors displaying code and data, with a prominent white diagonal stripe running from the top right towards the bottom left.

FORRESTER®

# Internet Applications Don't Need To Sacrifice Performance For Security

Get started →

FORRESTER OPPORTUNITY SNAPSHOT: A CUSTOM STUDY COMMISSIONED BY CLOUDFLARE JULY 2019

## Superior Digital Customer Experience Relies On Speed Without Sacrificing Security

In an increasingly competitive market, firms are pressed to both maintain customer trust that data is secure and deliver lightning-fast performance. The delivery of customer experiences across digital applications continues to grow only more complex. In response, firms need to implement foundational technology that can deliver both security and performance without compromise.

In May 2019, Cloudflare commissioned Forrester Consulting to conduct a global study of 172 IT and security decision makers to understand how next generation applications will be successfully developed, deployed, and delivered.

## Key Findings



Enterprises are adopting cloud solutions as part of their digital transformation journey, resulting in more complex infrastructure and technical environments than ever before.



Rather than taking a holistic, strategic view, many organizations face a trade-off between performance and security, introducing technical inefficiencies when adding new features or functionality.



As firms increase investment in both security and performance products and services, global cloud platforms that deliver security and performance in tandem are the new mandate.

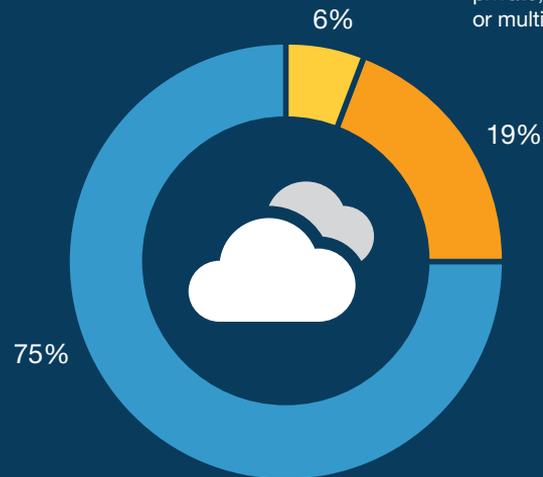
## Organizations Have Increasingly Complex Infrastructure

As enterprises adopt cloud solutions, their infrastructure complexity increases. Seventy-five percent of companies use at least one third-party cloud provider, and more than half of companies are using multiple cloud providers.

The main driver of using multiple cloud environments is to enable specific features and improve flexibility. Nearly 80% of IT decision makers agree that hybrid cloud strategies enable organizations to mix-and-match components and applications according to their needs.

## “Which of the following reflects your organization’s current cloud platform deployment model?”

- Entirely on-premises hardware
- Internal private cloud
- Using one or more third-party provider (public, hosted private, hybrid, or multicloud)



**75%** of companies use at least one third-party provider. More than half are using more than one (**54%** have hybrid or multicloud environments).

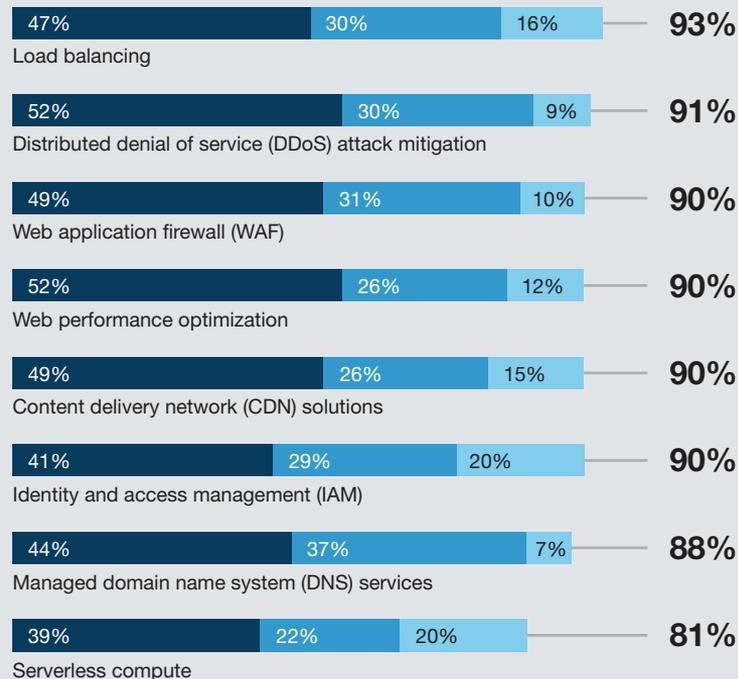
## Firms Are Increasing Investment In Performance And Security

Companies continue to invest in critical security and performance technology: 77% of firms expect to increase spending on security and performance solutions over the next three years.

Investment is growing across the board for emerging and established technologies. Over the next twelve months, 59% intend to implement/upgrade web application firewall solutions — a mature technology that only one in five firms have not yet adopted. Likewise, 59% of firms intend to either implement/upgrade serverless capabilities over the same period. Serverless is a relatively young technology that close to 40% of companies have not yet adopted. Early use cases for serverless architecture indicate that its flexibility provides improved performance; long term, this foundation will support new global transactional and security applications.<sup>1</sup>

## “What are your organization’s plans to adopt the following products or services in the next twelve months?”

● Expanding or upgrading implementation ● Implemented, not expanding or upgrading ● Planning to implement



## Firms Face Tough Trade-Offs Between Adding Features And Streamlining Technology

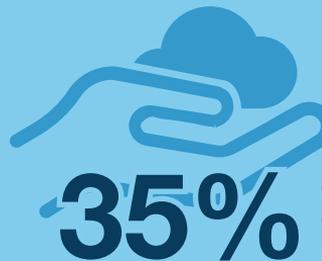
As firms add more components to their performance and security technology stack, many are forced to make trade-offs, and not all firms handle these trade-offs strategically. Only 11% of IT decision makers find it easy to build and maintain security infrastructure that does not compromise performance for web or application end users, suggesting that organizations are favoring one or the other. The resulting choice is either compromised security or compromised user experience.

When asked how trade-offs between different cloud providers are managed, a majority of IT executives (60%) indicate that they focus on platform benefits, rather than taking a holistic view of technical debt from multiple providers. Only one third (35%) take a more streamlined approach, focusing on strategically selecting fewer providers.

“Which of the following describes how your organization handles trade-offs between different cloud providers?”



Focus on platform benefits rather than technical debt from multiple providers



Choose a smaller set of strategic cloud providers

Many organizations rack up technical debt as they seek to add new features, rather than take a holistic, strategic view of their technology stack.

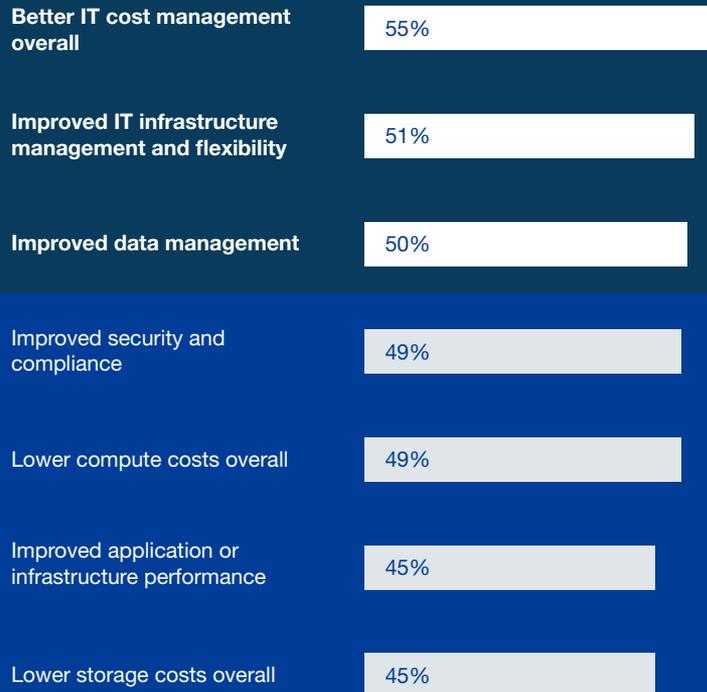
## Firms Avoid Vendor Lock-in With Hybrid And Multi-Cloud Deployment

IT decision makers expect hybrid and multi-cloud strategies to deliver a number of benefits, including better cost management, greater flexibility, and improved data management. Flexibility is also a critical risk mitigation strategy, as cloud applications are particularly vulnerable to vendor lock-in.<sup>2</sup> Seventy-five percent of survey respondents agreed or strongly agreed that their organization is moving to the cloud and wants to avoid cloud vendor lock-in; their future is multi-cloud — while 49% said they have achieved/expect to achieve improved security and compliance.



**75% of firms agree their organization wants to avoid being locked in to a single vendor.**

**“Which of the following benefits have you already achieved, or do you expect to achieve from the use of a hybrid cloud/multicloud environment?”**



## Global Cloud Platforms Must Deliver Reliability, Security, And Performance

When it comes to investing in an application technology stack, decision makers have clear priorities:

- **Reliability.** In an always-on world where applications deliver core business operations and differentiating digital experiences, customers will not tolerate unreliable applications.
- **Threat prevention.** When cybercriminals deploy an arsenal of ever-changing tactics to steal or destroy data, detecting and preventing threats is critical to building and retaining customer trust.
- **Performance without sacrificing security.** Both threat defense and high performance are prerequisites to customer experience. Security threats can cripple web applications, and most customers simply will not wait for sluggish performance.<sup>3</sup>

“When considering an investment in application performance or security technology, which of the following considerations are most important to you?”

● Rank 1   ● Rank 2   ● Rank 3



Reliability



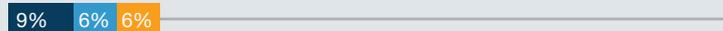
Security threat detection and prevention



Ability to deliver performance without sacrificing security



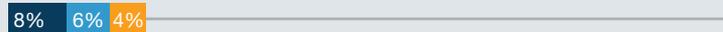
Cost effectiveness/investment unification



Impact on customer experience



Flexibility to scale



Server locations/geographical considerations



Available features and functionality

## Conclusion

The next generation of digital applications will rely on maintaining security without sacrificing end user performance. Our study showed:

- Most organizations invest in cloud opportunistically instead of strategically, which can increase cost inefficiency, vulnerabilities to operational risk, or exposure to bad actors.
- A hybrid cloud strategy will be essential to optimizing the right cloud for the right workload. Benefits that firms expect to achieve include better cost management, greater flexibility, and improved data management, but organizations will need to take a more strategic approach to realize these benefits.
- An integrated solution, such as a security-plus-performance global cloud platform with a single UI to manage multiple products, services, and consistent security policies across multi-cloud environments can enable the future of edge-enabled applications and experiences.

### **Project Director:**

Morgan Steele, Market Impact  
Consultant

### **Contributing Research:**

Forrester's Application Development  
and Delivery Research Group

## Methodology

This Opportunity Snapshot was commissioned by Cloudflare. To create this profile Forrester Consulting supplemented this research with existing application development and infrastructure research. The custom survey began and was completed in May 2019.

### ENDNOTES

- <sup>1</sup> Source: "Demystifying Serverless Computing," Forrester Research, Inc., January 25, 2018.
- <sup>2</sup> Source: "The Coming Consolidation Of Cloud," Forrester Research, Inc., August 2, 2017.
- <sup>3</sup> Source: "Optimize Performance For Global And Mobile eCommerce," Forrester Research, Inc., March 30, 2016.

### ABOUT FORRESTER CONSULTING

Forrester Consulting provides independent and objective research-based consulting to help leaders succeed in their organizations. Ranging in scope from a short strategy session to custom projects, Forrester's Consulting services connect you directly with research analysts who apply expert insight to your specific business challenges. For more information, visit [forrester.com/consulting](https://forrester.com/consulting).

© 2019, Forrester Research, Inc. All rights reserved. Unauthorized reproduction is strictly prohibited. Information is based on best available resources. Opinions reflect judgment at the time and are subject to change. Forrester®, Technographics®, Forrester Wave, RoleView, TechRadar, and Total Economic Impact are trademarks of Forrester Research, Inc. All other trademarks are the property of their respective companies. For additional information, go to [forrester.com](https://forrester.com). [E-43840]

FORRESTER OPPORTUNITY SNAPSHOT: A CUSTOM STUDY COMMISSIONED BY CLOUDFLARE JULY 2019

## Demographics

### GEOGRAPHY

North America: **21%**

Latin America: **12%**

Europe: **33%**

Asia Pacific: **33%**

### COMPANY SIZE (EMPLOYEES)

Small (100 – 999): **14%**

Midsize (1,000 – 4,999): **40%**

Large (5,000 – 19,999): **26%**

Very large (20,000+): **20%**

### RESPONSIBILITY

C-level executive: **19%**

Vice president: **27%**

Director: **54%**

### INDUSTRY

Cross-industry



FORRESTER®