A10

Hybrid Your Way

REPORT

The State of Application Load Balancing in 2025

As organizations move to hybrid cloud, security and resiliency are key issues—along with finding a vendor they can count on

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Introduction

Hybrid cloud has become the standard. While a few organizations still host their applications entirely on-prem, and others are evolving toward all-cloud, the overwhelming majority maintain a mix of both on-prem and cloud environments. This approach makes load balancing a critical capability. By optimally distributing workloads across environments, companies can enhance system reliability, performance, and scalability while facilitating disaster recovery.

Whether delivered through a standalone device or as a feature of an application delivery controller (ADC), load balancing helps companies address top priorities around:

Application Security Threats
Protecting workloads and networks from threats, including new AI-related threats

Scale
Adapting to the rising network demands associated with data-intensive AI and ML applications

Legacy Technology
Extending the value of existing investments while bridging the transition to new technologies in the cloud

Modernization
Providing a unified approach to traffic management across diverse data centers and cloud resources

But how well are their existing vendors and solutions helping them meet this requirement? In this report, data from three industry surveys highlights the role of load balancing at organizations around the world—and the challenges they continue to face.

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Key Findings

To learn more about the state of load balancing today, A10 commissioned a series of industry surveys:

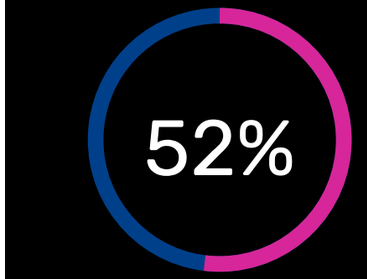
- An A10 and Gatepoint Research survey of U.S. executives themed *Modern Application Delivery Strategies for Hybrid Clouds*
- An A10 and Gatepoint Research survey of U.S. executives themed *Network Load Balancing Technology Trends*
- An A10 and Opinion Matters survey of in-house IT professionals in EMEA themed *Network Load Balancing Technology Trends*

The surveys focused both on the experience of participants with their current load balancing solution and their concerns moving forward as they address future needs. Questions addressed areas including:

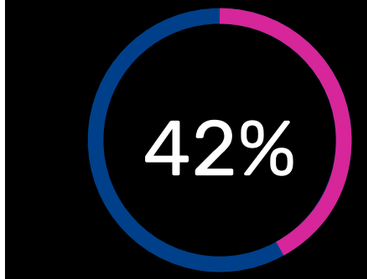
- How successful do you think your organization has been with migrating applications to the cloud, and how will your approach evolve in the future?
- What are your top initiatives and priorities in the coming year?
- What are your top application delivery or load balancing challenges?
- What issues do you have with your load balancing solution, and what would prompt you to reevaluate your choice?

In their responses, survey participants highlighted the importance of security and resiliency in their application delivery or load balancing capabilities—as well as finding a vendor they can count on:

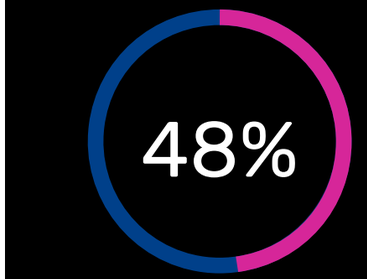
- 52% of U.S. executives need enhanced security to ensure their business objectives are successful
- 42% of EMEA IT professionals cited investment in developer security tools as a primary focus
- 48% of U.S. executives named faster troubleshooting and root cause analysis as top issues
- 47% of EMEA IT professionals cited limited or poor vendor support as their top reason to change ADC providers – and 55% of U.S. executives agreed



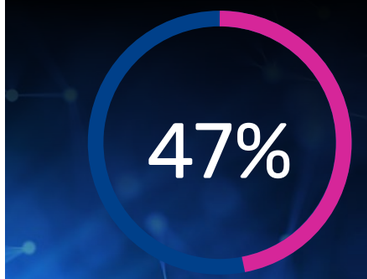
of U.S. execs need enhanced security



of EMEA IT pros are focusing on developer security tools



of U.S. execs struggle with faster troubleshooting and root cause analysis



of EMEA IT pros and 55% of U.S. execs would change ADC providers over limited or poor vendor support

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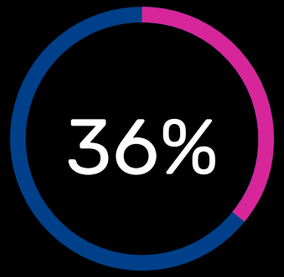

Only 36% of U.S. execs report highly successful app migration to the cloud

Lead the U.S.
Public Cloud Market

aws + Azure

EMEA Market Share
is More Balanced Across

Google Cloud, Oracle, aws, Azure

Cloud Migration Success has been Limited

Cloud environments have been a mainstay of IT for many years, but even now many businesses are less than enthusiastic about their application migration capability.

Only 36 percent of U.S. executives consider their organization to have been highly successful migrating applications to the cloud, while 44 percent called their success rate a lukewarm “somewhat.”

This finding is especially significant given the prominence of hybrid cloud environments in today’s organizations. Only 25 percent of U.S. executives host their applications primarily in on-prem data centers, while a majority (56%) rely on a combination of on-prem and public cloud.

In the U.S.
Amazon Web Services (AWS) and Microsoft Azure are the clear leaders in public cloud market share, both used by 64 percent of U.S. execs in one of our surveys. In our second survey, Azure commanded a 77 percent share, with AWS following at 55 percent.

In EMEA
Among EMEA IT professionals, it’s a different story with deployment environments more evenly distributed across four providers. Google Cloud tops the market with 44 percent, followed by AWS (42%), Oracle Cloud Infrastructure (OCI) (40%), and Azure (36%).

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Security, Resiliency, and Modernization Top the Agenda

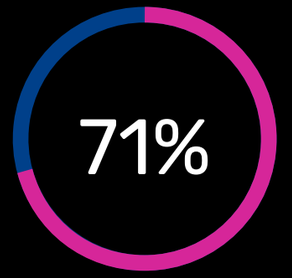
While participants shared a wide range of priorities, a clear majority in most regions focused on security and resiliency—both key for ensuring continuous business.

Within the U.S., 71 percent of respondents to one survey named the two collectively as their top initiative of the year. Asked about each of these priorities separately, respondents in the other survey were most likely to focus on security (71%), though IT resiliency still ranked highly at 60 percent.

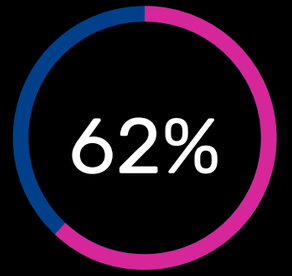
In EMEA, IT professionals named several security-related areas as top priorities, including investing in developer security tools (42%), implementing protection against AI-related threats (38%), and improving security and resiliency (37%).

This isn't to say that organizations are shifting focus from IT modernization. Sixty-two percent of U.S. executives called this a high-priority initiative, while 41 percent of EMEA IT professionals said the same. Among Middle East respondents, it was the most frequently cited priority (66%).

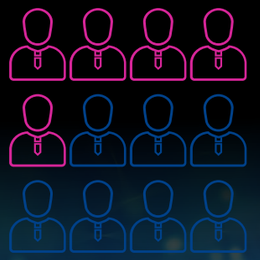
Cost, of course, is a perennial concern. Over one-third of U.S. executives (36%) called reducing data center costs a top priority, echoed by 38 percent of EMEA IT professionals, including 42 percent of respondents in Italy.



of U.S execs call security and resiliency a top priority



of U.S. execs and 66% of Middle East IT pros call IT modernization a top priority



Over one-third of respondents in all regions call data center cost reduction a top priority

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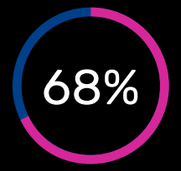
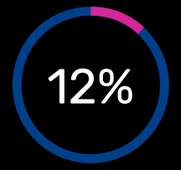
HOW WOULD YOU DESCRIBE THE FUTURE OF YOUR CLOUD STRATEGY?

U.S. Executives



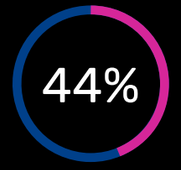
Cloud-first



Cloud-native

Cloud-only

EMEA IT Professionals



Cloud-first

Cloud-native

Cloud-only

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The Future is Hybrid Cloud

Nearly all respondents prioritize cloud computing solutions as the primary option for delivering new IT services, though EMEA IT professionals were much more likely to have cloud-native or cloud-only strategies.

Within the U.S., 68 percent of executives describe the future of their cloud strategy as cloud-first, a model in which all new applications are delivered in the cloud while some legacy applications remain on-prem.

Within EMEA, a cloud-first approach is favored by 44 percent of IT professionals, including 46 percent of respondents in Italy, while 37 percent name cloud-native, in which applications are built and deployed specifically for cloud environments. In each region, fewer than one-fifth of respondents report a cloud-only strategy in which no on-prem infrastructure is used (10% U.S., 19% EMEA), though individual countries showed a wide variation. Thirty percent of UK IT professionals have embraced a cloud-only strategy, compared with just 6 percent of respondents in Germany.

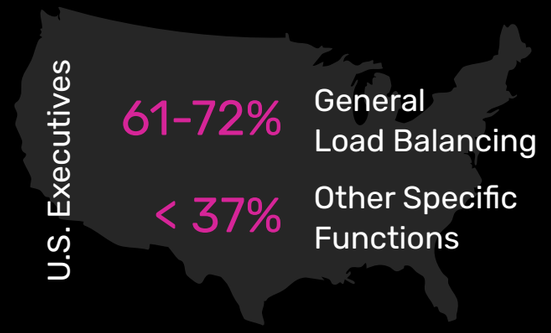
Organizations not Fully Tapping into their ADC Capabilities

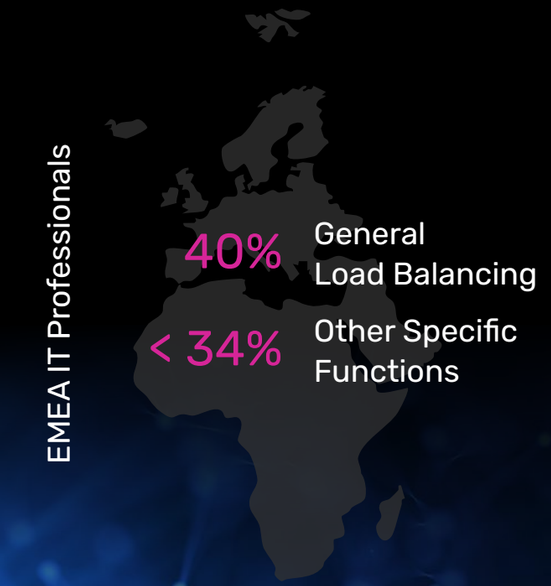
Most surveyed organizations use an ADC or network load balancer for general network load balancing, but fewer than half use the solution for other specific functions as well. While our two U.S. surveys posed the question in slightly different ways, the responses were roughly consistent.

Asked whether they use an ADC or network load balancer for various functions, 61 percent of U.S. executives in one survey named general load balancing, far more than used the solution for access control (35%,) global server load balancing (GSLB) (32%), or application-layer security (32%). In our other survey of U.S. executives, 72 percent named general load balancing as the primary purpose served by their load balancing solution, followed by load balancing virtual desktop infrastructure (VDI) (37%) and GSLB (33%).

Within EMEA, IT professionals showed a more even distribution of primary use cases for their ADC or other load balancing solution, though none approached even a 50 percent share across the region. Forty percent named general network load balancing, followed by app scripting, analytics, performance feedback, acceleration, or optimization (34%); application-layer security (34%); GSLB (32%); and access control (32%). Respondents from the Middle East were somewhat more likely to name general network load balancing as their primary purpose for the solution (52%).

HOW RESPONDENTS USE THEIR ADC OR LOAD BALANCING SOLUTION





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40%

of U.S. execs call security threats their greatest application delivery challenge

52%

of U.S. execs say that the security capabilities of their existing solution need to be enhanced

40%

of EMEA IT pros say their ADC has issues with application security threats

Businesses Need More From Their Load Balancers

Two related survey questions showed a concerning correlation between the application delivery challenges U.S. executives face and the areas where they need most improvement from their application or load balancing solution. Simply put, application security is critical—and ADCs and load balancers need to do a better job with it.

Asked about their top application delivery or load balancing challenges, 40 percent of U.S. executives named application security threats. But this is the exact area where their existing solutions show the greatest shortcomings. A majority of respondents (52%) said that the security of their application or load balancing capabilities need to be enhanced to ensure the success of their business objectives. EMEA IT professionals agreed; 40 percent named application security threats as a key issue for their ADC or load balancing solution.

Security wasn't the only area where application and load balancing solutions are falling short. Nearly as many U.S. executives called for faster troubleshooting and root cause analysis (48%), followed by analytics and application insights (32%), automation (32%), and faster application performance (28%).

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Sometimes Solutions Are Part of the Problem

IT organizations report a variety of complaints with their ADCs and load balancers. Interestingly, while some pertain to solution capabilities, many of these issues center on the relationship with the vendor—in particular, changes to and cost of licensing.

In the U.S., IT executives named increasingly costly licenses as their top complaint (29%), edging out even the always-critical issue of security threats (28%). More than a quarter (28%) added that being locked into a single vendor limits their flexibility.

IT professionals in EMEA were even less satisfied with their ADC or network load balancing solution, though again, vendor issues were high on the list. Forty-four percent reported challenges adapting to recent changes in vendor licensing or support, including 66 percent of Middle East respondents. Thirty-nine percent had seen a significant hike in licensing costs, including 52 percent in the Middle East and 50 percent in Germany.

Other issues named by EMEA IT professionals included solution complexity (43%) and application security threats (40%). Fewer than 1 percent said that they had no issues at all.

29% of U.S. execs complain about rising licensing costs

44% of EMEA IT pros have issues with changes in vendor licensing/support

39% of EMEA IT pros have seen a significant hike in fees

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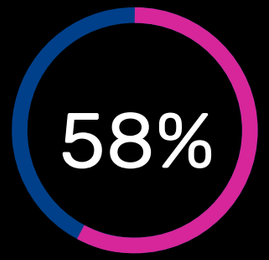
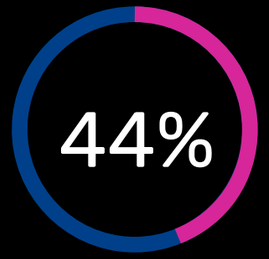
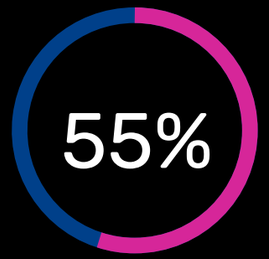


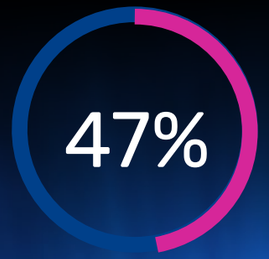
of U.S. execs would reevaluate their solution based on a rise in cost



of EMEA IT pros would reevaluate their solution based on a rise in cost



of U.S. execs would reevaluate their solution due to limited or poor vendor response or support



of EMEA IT pros would reevaluate their solution due to limited or poor vendor response or support

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Vendor Issues can Drive Organizations to Look Elsewhere

While most organizations see shortcomings in the capabilities of their existing ADC or load balancer, as discussed earlier, vendor issues are by far the most common factor leading them to seek an alternative.

Asked what would prompt a reevaluation of their ADC or network load balancing solution, a clear majority of U.S. executives (58%) named a hike in vendor or solution costs, followed by 55 percent naming limited or poor vendor response or support. These outpaced even the critical issue of increased latency, lag, or downtime (48%).

EMEA IT professionals showed a similar focus on vendor issues. Asked what might make them change their ADC provider, 47 percent named limited or poor vendor response or support, followed by 44 percent who'd be prompted to change by a hike in costs, including 58 percent of respondents in Germany. Both factors were cited more often than a security breach (41%).

Framing the issue differently brought a similar consensus on vendor value. Asked what projected business outcomes would trigger a discussion about a change, 45 percent of U.S. executives named ROI, followed by less expensive, flexible licensing at 44 percent—both more than the share of respondents who'd consider changing for modern, evolving functionality (41%). EMEA IT professionals put superior vendor support at the top of the list at 33 percent.

When organizations do change solutions, what criteria do they focus on? The top considerations are no surprise: integrated security features (52%), lower infrastructure cost (45%), and ROI (36%)—but here again, the vendor relationship remains important. In our survey of U.S. executives, 32 percent look for superior vendor support, while 27 percent want to see flexible, simpler licensing.

Next Steps to Build a Successful Load Balancing Vendor Partnership

Functionality and performance are critical considerations for any solution, but real value depends on finding a vendor you can trust for the long term.

Requirements and priorities can change over time; the right partner will work with you to achieve your goals, overcome your challenges, and deliver the best results for your business.

As you consider your options for load balancing, make sure to research each vendor's track record with customers and the cost profile of their solution. The following resources will help you begin a successful evaluation and selection process.

Compare Cloud Costs

Are you paying too much for your cloud load balancers? What should your costs look like?

Use our cost comparison tool to get an estimate for different providers and volume scenarios.

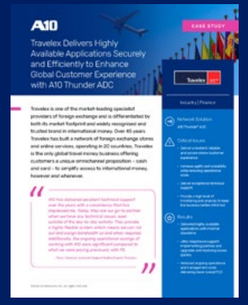
Estimate Your Costs

CASE STUDY

Flexible, Cost-effective Load Balancing in Healthcare

Learn how the American Registry of Radiologic Technologists (ARRT) ensures uptime with optimal ADC performance, flexibility, and cost effectiveness.

Read Now



CASE STUDY

Ensuring Performance for Multinational FinServ

Find out how Travelex International Ltd. delivers real-time reliability for banks, travelers, and other customers across more than 2,000 locations in 20+ countries.

Read Now

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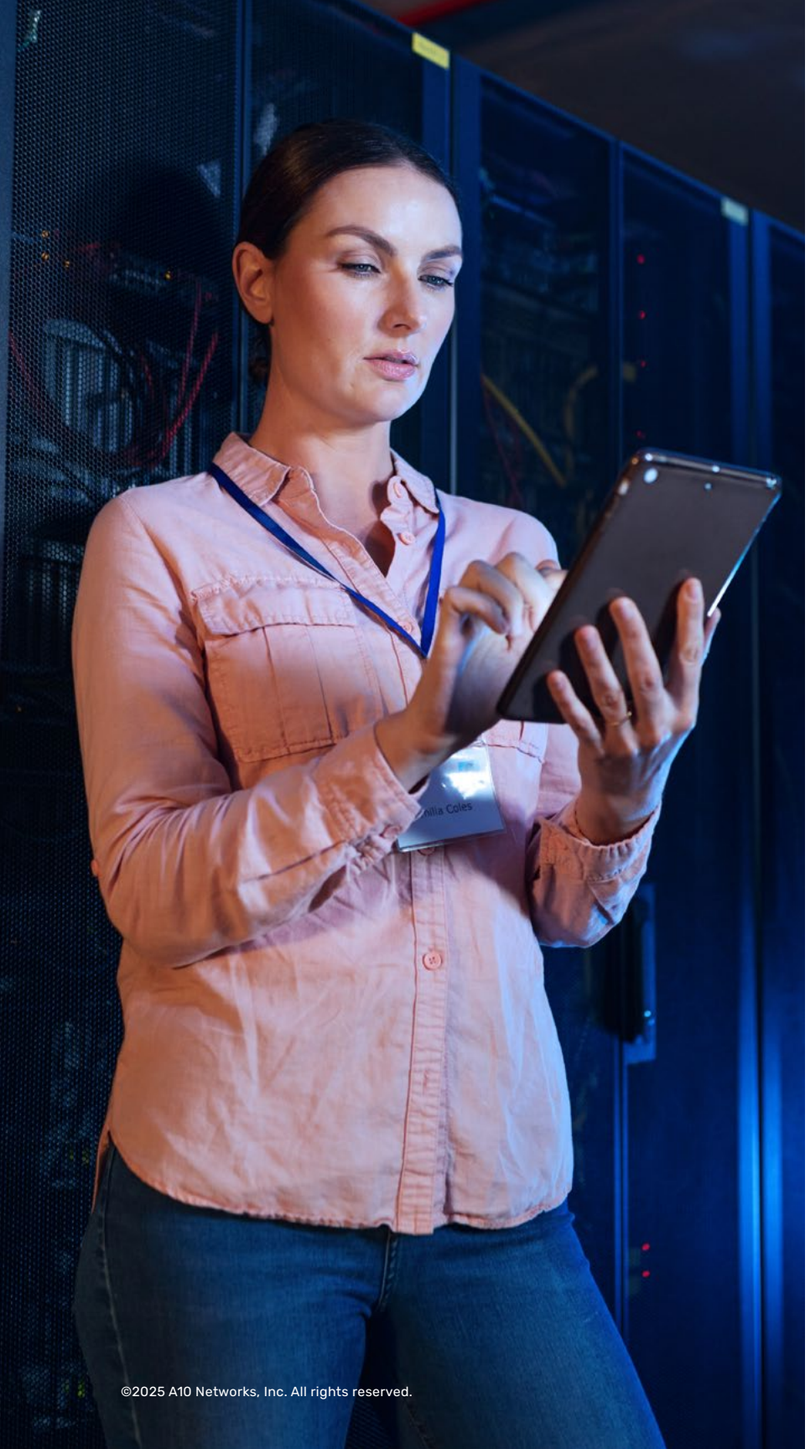

Who did we survey?

This report is based on three surveys with the following methodologies.

Modern Application Delivery Strategies for Hybrid Clouds

Gatepoint Research surveyed 75 U.S. IT professionals, including 41% CxOs, 16% VPs, 15% directors, and 28% senior or department managers. 100% of responders were invited via email and participated voluntarily; none were engaged using telemarketing.

Network Load Balancing Technology Trends

Gatepoint Research surveyed 177 U.S. IT professionals, including 37% CxOs or VPs, 20% directors, 12% senior or department managers, 25% network engineers, and 6% infrastructure architects. 100% of responders were invited via email and participated voluntarily; none were engaged using telemarketing.

Network Load Balancing Technology Trends

Opinion Matters surveyed 300 IT professionals in Germany, United Kingdom, Middle East, Benelux, Spain and Italy. All respondents oversee networks, cloud migration, and IP addresses, including 37% head of global network architecture, 28% IP network manager/engineer, 21% head of network architecture, and 13% load balancer engineer. 100% of responders were invited via email and participated voluntarily; none were engaged using telemarketing.

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About A10 Networks

A10 Networks provides security and infrastructure solutions for on-premises, hybrid cloud, and edge-cloud environments. Our 7000+ customers span global large enterprises and communications, cloud and web service providers who must ensure business-critical applications and networks are secure, available, and efficient. Founded in 2004, A10 Networks is based in San Jose, Calif. and serves customers globally.

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