Parallels Cloud Survey 2026 Results

1. What industry do you work in?

	Total	USA only	UK only	DE only
Consulting	**3%**	3%	2%	3%
Architecture	**2%**	1%	1%	12%
Education	**3%**	3%	3%	5%
Financial Services	**12%**	6%	16%	25%
Healthcare	**2%**	2%	2%	3%
Government	**1%**	1%	2%	0%
Legal	**1%**	1%	4%	1%
Manufacturing	**7%**	7%	1%	17%
Retail	**2%**	70%	2%	1%
Technology	**63%**	70%	64%	31%
Other	**4%**	5%	4%	1%

2. What best describes your business?

Question for only individuals that selected “Technology” in question 1

Value	**Total**	USA only	UK only	DE only
Independent software vendor (ISV)	**26%**	25%	23%	40%
Hardware vendor	**9%**	6%	14%	6%
Managed services provider (MSP)	**17%**	14%	23%	13%
Value-added reseller (VAR)	**3%**	1%	3%	2%
Enterprise customer (corporate IT department)	**31%**	38%	26%	23%
Educational institution (K-12, college, university)	**3%**	3%	3%	6%
Government agency	**3%**	5%	4%	2%
Nonprofit/NGO	**1%**	1%	0%	0%
Small business/SMB	**4%**	6%	2%	5%
Other (please specify)	**4%**	5%	3%	3%

3. Which country are you located in?

	Total
United States	**47%**
United Kingdom	**41%**
Germany	**11%**
Others	**1%**

4. How many employees does your company have?

	Total	USA only	UK only	DE only
1-300 (Small Business)	**8%**	3%	14%	7%
301-1000 (Mid-Market)	**48%**	45%	52%	37%
1001+ (Enterprise)	**45%**	52%	33%	56%

5. What are the top reasons for using DaaS/VDI within your organization?

Ranked 1-7, with 1 being the most important

	Total	USA only	UK only	DE only	Mid-Market
Secure and protect company data	1	1	1	1	1
Centralize user desktops and applications	2	2	2	2	2
Enable work from anywhere	3	3	3	3	3
Control user access to certain business applications	4	4	4	4	4
Simplify the management of Applications and Desktops	5	5	5	5	5
Enable employees to use alternative/personal devices for work	6	6	6	7	6
Control Cost	7	7	7	6	7

6. Is your organization seeking a new DaaS/VDI solution right now?

	Total	USA only	UK only	DE only	Mid-Market
Yes	**66%**	71%	61%	55%	72%
No	**29%**	26%	32%	39%	24%
Not sure	**5%**	3%	7%	6%	4%

7. If so, what is your potential timeframe for implementation?*

**Follow-up question from previous – when choosing "yes"*

	Total	USA only	UK only	DE only	Mid-Market
0-3 months	**17%**	21%	16%	7%	18%
4-6 months	**53%**	55%	50%	56%	55%
7 months – 1 year	**24%**	19%	28%	35%	21%
More than 1 year	**5%**	5%	6%	2%	5%

8. What are the most common issues or challenges you experience with your current DaaS/VDI solution?

	Total	USA only	UK only	DE only	Mid-Market
High and unpredictable costs	**49%**	55%	46%	23%	47%
Too complex to manage and maintain	**41%**	42%	36%	47%	38%
Unreliable performance	**32%**	28%	35%	37%	28%
Requires too many IT resources	**54%**	59%	45%	60%	51%
Training and onboarding staff is too difficult	**30%**	28%	30%	36%	36%
Lack of centralized control	**28%**	25%	34%	23%	31%
Limited flexibility and scalability	**31%**	32%	31%	21%	32%
Vendor support and responsiveness is inadequate	**14%**	18%	11%	-	13%

9. What is the main barrier preventing your organization from switching to a new DaaS/VDI solution?

	Total	USA only	UK only	DE only	Mid-Market
Migration might be too complex and time-consuming	**32%**	38%	28%	15%	32%
Fear of disruption during transition	**22%**	16%	29%	27%	25%
Cost of transition	**24%**	22%	27%	31%	23%
Lack of internal expertise	**7%**	5%	8%	15%	7%
Concerns about user adoption/training	**7%**	7%	5%	11%	6%
Satisfied with current vendor	**8%**	12%	5%	2%	7%

10. How much time does your team spend on day-to-day VDI administration?

	Total	USA only	UK only	DE only	Mid-Market
Less than 1 hour per week	**3%**	3%	2%	2%	3%
1-5 hours per week	**42%**	39%	46%	47%	45%
6-10 hours per week	**43%**	44%	41%	48%	41%
More than 10 hours per week	**12%**	14%	10%	3%	11%

11. Beyond licensing, where do you see the greatest hidden costs of your VDI/DaaS deployment?

	Total	USA only	UK only	DE only	Mid-Market
IT staff time/administration	68%	77%	38%	23%	66%
Security/compliance overhead	44%	46%	61%	52%	47%
Storage and infrastructure	35%	34%	30%	39%	34%
Support/help desk tickets	33%	34%	27%	45%	33%
Specialized skills training	32%	28%	42%	44%	30%
User dissatisfaction/attrition	28%	26%	38%	31%	47%
Additional management tools	27%	29%	27%	18%	34%
Extended deployment cycles	20%	21%	20%	10%	20%
Annual support charges	18%	20%	17%	3%	17%
Requirements for specialized IT knowledge	13%	12%	16%	5%	13%

12. Vendor lock-in: How concerned is your organization about becoming locked into a single vendor for EUC/VDI/DaaS?

	Total	USA only	UK only	DE only	Mid-Market
Very concerned	**48%**	53%	46%	26%	52%
Somewhat concerned	**46%**	40%	50%	68%	44%
Not concerned	**6%**	7%	4%	7%	4%

13. Over the past 12 months, how has the balance between installed applications and SaaS solutions changed in your organization?

	Total	USA only	UK only	DE only	Mid-Market
SaaS usage has significantly increased	**34%**	39%	32%	15%	34%
SaaS usage has slightly increased	**48%**	46%	51%	42%	49%
No change	**15%**	12%	14%	34%	13%
SaaS usage has slightly decreased	**3%**	2%	2%	10%	3%
SaaS usage has significantly decreased	**1%**	1%	<1%	<1%	1%

14. What is the primary impact of SaaS on your organization?

	Total	USA only	UK only	DE only	Mid-Market
Improved scalability	**30%**	9%	32%	29%	33%
Easier to manage	**28%**	29%	27%	23%	25%
Accessibility (from any device, anywhere)	**15%**	28%	12%	16%	14%
Enhanced security	**11%**	17%	12%	10%	11%
Lower up-front costs	**10%**	10%	12%	3%	5%
Increase in costs	**5%**	5%	4%	10%	1%
No choice – software we need only available as SaaS	**2%**	1%	2%	8%	<1%

15. How does your organization currently manage web browsing security?

	Total	**USA only**	**UK only**	**DE only**	**Mid-Market**
Using antivirus and antimalware software	**23%**	29%	19%	7%	23%
Through firewall and network security solutions	**46%**	45%	49%	39%	45%
Manual oversight and policy enforcement	**14%**	10%	15%	29%	15%
Security awareness training for users	**11%**	11%	10%	15%	11%
Browser isolation technology	**7%**	5%	7%	11%	7%

16. Are you running workloads in the cloud?

	Total	USA only	UK only	DE only	Mid-Market
Yes, single cloud	**19%**	25%	15%	3%	20%
Yes, multi-cloud	**43%**	41%	46%	42%	45%
Yes, hybrid cloud (on-premises and single cloud)	**33%**	32%	35%	31%	31%
No, on-premises only	**4%**	1%	3%	19%	3%
Other	**2%**	1%	1%	5%	1%

17. Do you anticipate migrating workloads from the public cloud back to on-premises infrastructure, currently or in the future?

	Total	USA only	UK only	DE only	Mid-Market
No, we'll stay in the public cloud	**13%**	14%	14%	3%	11%
Considering	**38%**	43%	29%	39%	38%
Yes, in a hybrid model	**36%**	28%	44%	52%	36%
Yes, fully on-premises	**13%**	15%	14%	7%	15%

18. What % of applications are installed on-premises or in a cloud environment versus delivered as a service (SaaS)?

	Total	USA only	UK only	DE only	Mid-Market
All installed	**10%**	13%	9%	2%	10%
75% installed 25% SaaS	**32%**	28%	35%	34%	35%
50% installed 50% SaaS	**45%**	46%	43%	50%	42%
25% installed 75% SaaS	**11%**	10%	12%	15%	11%
All SaaS	**2%**	3%	2%	-	2%

19. Is your organization concerned about data sovereignty (i.e., ensuring data is stored and managed within your country or region due to legal, regulatory, or compliance requirements)?

	Total	USA only	UK only	DE only	Mid-Market
Yes	84%	84%	87%	74%	87%
No	16%	16%	13%	26%	13%

20. If yes, what are your organization’s specific concerns around data sovereignty?

	Total	USA only	UK only	DE only	Mid-Market
Compliance with regional data protection laws (e.g., GDPR, CCPA)	**58%**	60%	60%	37%	56%
Restrictions on cross-border data transfer	**49%**	50%	48%	44%	47%
Government access or surveillance concerns	**44%**	47%	37%	52%	43%
Data residency requirements from clients or partners	**53%**	53%	54%	46%	54%
Security risks associated with foreign data centers	**53%**	51%	53%	57%	32%
Vendor transparency about data storage locations	**34%**	35%	36%	22%	12%
Geopolitical factors	**14%**	13%	16%	7%	<1%

21. With significant disruption in the VDI/DaaS market, what leading reasons can influence change in your company's IT strategy?

	Total	USA only	UK only	DE only	Mid-Market
Rising costs	64%	68%	65%	39%	63%
Uncertain product roadmaps	46%	46%	43%	61%	43%
Concern of future support	57%	61%	54%	48%	58%
Lack of integration	34%	31%	42%	24%	35%

22. When applying new technologies like AI to end-user computing, which of the following would you want to prioritize?

	Total	USA only	UK only	DE only	Mid-Market
Issue detection and resolution	47%	54%	42%	27%	47%
Cost optimization	50%	44%	57%	48%	51%
Application deployment and patching	41%	41%	38%	52%	41%
Security monitoring	58%	60%	59%	42%	59%
Reducing administrative overhead	39%	40%	38%	40%	37%
We would want AI to address all of these	13%	12%	15%	10%	14%

23. When considering AI capabilities as they relate to virtualization or end-user computing solutions, which statements best reflect your organization's perspective?

	Total	USA only	UK only	DE only	Mid-Market
AI is integral to our virtualization and end user computing solutions.	40%	41%	42%	21%	44%
AI capabilities deliver measurable business outcomes and efficiencies.	47%	48%	51%	27%	47%
AI features provide meaningful enhancements that improve usability and performance.	55%	54%	58%	45%	62%
AI has potential, but its impact on our operations has been limited so far.	38%	42%	29%	47%	34%
We are willing to allocate additional budget or spend more for AI features.	29%	26%	29%	37%	28%
AI is not a current strategic priority for our organization.	11%	10%	9%	26%	13%
AI introduces potential cost, complexity, or security challenges that outweigh its benefits.	15%	17%	12%	18%	15%
Automation capabilities are a higher priority and deliver clearer value than AI features.	11%	11%	13%	11%	10%
We aren't prepared to allocate additional budget/resources specifically for AI capabilities.	3%	4%	2%	2%	3%
Our organization is assessing AI's potential benefits before making further investments.	10%	12%	10%	5%	8%

24. Does your company allow employees who can, work remotely?

	Total	USA only	UK only	DE only	Mid-Market
Yes, we are primarily remote.	34%	42%	28%	11%	36%
No, everyone works on site.	16%	14%	16%	31%	17%
Hybrid, we have a mix of remote and on-site staff.	44%	38%	51%	52%	41%
Yes, employees can work remotely in specific cases.	6%	6%	6%	7%	6%

25. Workspace Model Adoption: If budget and resources were no constraint, which workspace model would your organization adopt?

	Total	USA only	UK only	DE only	Mid-Market
100% SaaS/browser-based workspaces	28%	34%	23%	14%	29%
100% VDI/DaaS	22%	19%	25%	31%	25%
Hybrid (mix of local, SaaS, and VDI/DaaS)	49%	45%	51%	55%	45%
Physical PCs only	1%	1%	<1%	<1%	1%

26. What are your biggest security concerns?

Percentages reflect the share of respondents who are very or somewhat concerned.

	Total	USA only	UK only	DE only	Mid-Market
Ransomware and malware attacks	87%	90%	90%	61%	89%
Cloud vulnerabilities	84%	87%	85%	57%	85%
Social engineering	73%	78%	72%	45%	72%
Human error (e.g., weak passwords, employee negligence)	80%	84%	79%	68%	81%
AI insecurity and/or vulnerability	74%	75%	76%	54%	77%

27. What new challenges has hybrid working introduced at your organization?

Ranked 1-7, with 1 being the highest priority

	Total (rank)	USA only	UK only	DE only	Mid-Market
More complex endpoint security management	1	2	1	2	2
New challenges with managing access for remote users	2	1	2	1	1
Need for stronger employee security awareness and training	3	3	3	3	3
Increase in ransomware and phishing	4	4	4	4	4
Extended monitoring across devices and networks	5	5	5	5	5
Increased focus on incident response planning	6	6	6	6	6
Difficulty meeting compliance requirements	7	7	7	7	7

28. Has your organization experienced a security breach in the past year?

	Total	USA only	UK only	DE only	Mid-Market
Yes	49%	53%	47%	37%	53%
No	48%	45%	49%	58%	44%
Not sure	3%	2%	4%	3%	3%

29. Shadow IT: Do employees in your organization use unauthorized SaaS, collaboration, or remote access tools outside IT's control?

	Total	USA only	UK only	DE only	Mid-Market
Yes, frequently	33%	42%	23%	23%	34%
Occasionally	40%	40%	38%	42%	40%
Rarely	17%	12%	22%	23%	15%
Never/Not aware	11%	7%	17%	11%	11%

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30. What is your organization's budget outlook for cybersecurity in 2026?

	Total	USA only	UK only	DE only	Mid-Market
Increasing significantly	59%	78%	38%	39%	49%
Increasing slightly	24%	11%	38%	39%	33%
Remaining the same	11%	3%	19%	23%	12%
Decreasing slightly %	1%	3%	-	-	3%
Decreasing significantly	4%	6%	5%	-	3%

31. What is your organization's budget outlook for End User Computing (EUC) solutions in 2026?

	Total	USA only	UK only	DE only	Mid-Market
Increasing significantly	35%	38%	42%	15%	33%
Increasing slightly	44%	50%	33%	46%	49%
Remaining the same	16%	6%	17%	39%	15%
Decreasing slightly	3%	0%	8%	-	3%
Decreasing significantly	3%	6%	-	-	-

32. What is your organization's budget outlook for Cloud infrastructure and services in 2026?

	Total	USA only	UK only	DE only	Mid-Market
Increasing significantly	41%	55%	64%	8%	40%
Increasing slightly	32%	33%	9%	62%	34%
Remaining the same	22%	8%	27%	31%	20%
Decreasing slightly	1%	3%	-	-	3%
Decreasing significantly	4%	1%	-	-	3%

33. What is your organization's budget outlook for on-premises infrastructure in 2026?

	Total	USA only	UK only	DE only	Mid-Market
Increasing significantly	31%	33%	38%	15%	41%
Increasing slightly	33%	34%	33%	38%	27%
Remaining the same	23%	23%	29%	46%	27%
Decreasing slightly	9%	8%	-	%	3%
Decreasing significantly	4%	3%	-	%	3%

34. What is your organization's budget outlook for SaaS applications in 2026?

	Total	USA only	UK only	DE only	Mid-Market
Increasing significantly	42%	39%	48%	23%	42%
Increasing slightly	28%	44%	35%	31%	31%
Remaining the same	18%	11%	13%	46%	19%
Decreasing slightly	4%	4%	4%	-	9%
Decreasing significantly	7%	3%	-	-	-


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