
WINDOWS 10: THE STATE OF THE UNION

A SURVEY OF DESKTOP STAKEHOLDERS IN IT

April 2017

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Introduction

Significant releases of the Windows operating system are always an event. Despite the hype and hoopla surrounding most releases, Microsoft has had mixed success rates over the years. Windows XP offered a solid and dependable environment that IT professionals relied on. It was followed by Vista, which had very little success with IT organizations due to a well-deserved reputation for being an unreliable, low performing, resource hog. Windows 7 caused the pendulum to swing back again with a solution that met the needs of both end users and IT professionals. But Windows 8, with the removal of the Start Menu, was too big of a step for end users, and was not adopted by businesses.

Enter Windows 10, released in 2015. For most industry observers, it is not yet clear if Windows 10 will be an enormous success that will be broadly embraced by IT organizations or if Microsoft will ultimately see low levels of adoption. But it is clear that Microsoft is putting their energy into ensuring their customers make the migration. This research explores the current state of Windows 10 adoption in corporate IT. Who is adopting it? How broad is adoption? What are IT organizations' future plans? What is getting in the way?

The following report, sponsored by Ivanti®, is based on an international survey of 1,826 IT professionals. All had decision-making responsibility for corporate desktops and laptops. Questions were asked on a wide range of subjects including current adoption of Windows 10, future plans, experiences, concerns and more. This was a global survey and included participants from a wide range of countries, including the United States, Canada, Australia, New Zealand, the United Kingdom, France, Germany, Spain, Italy, Austria, Belgium, Denmark, Finland, Iceland, Ireland, Italy, Luxembourg, Norway, Portugal, Spain, Sweden, Switzerland, and the Netherlands.

Key Findings

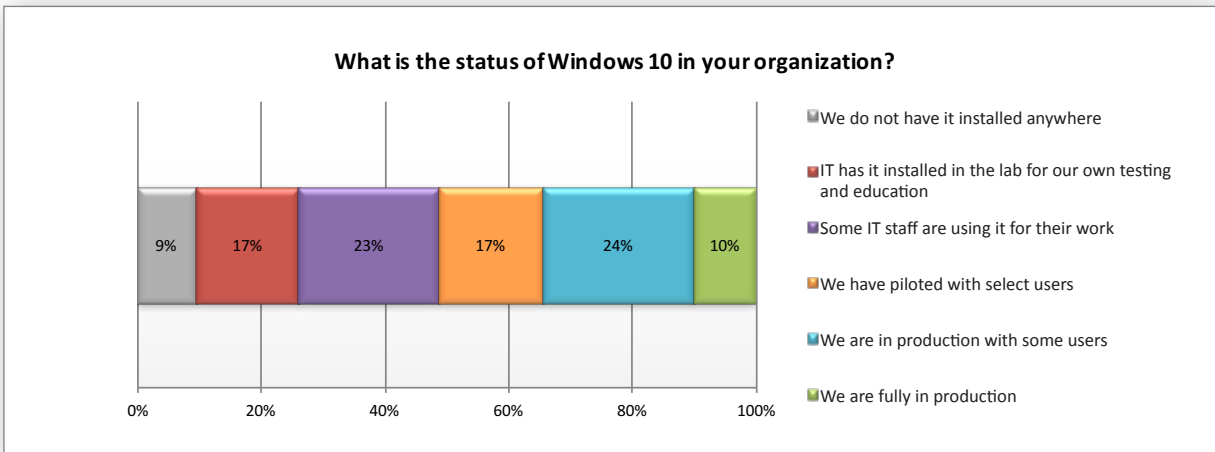
- **Windows 10 adoption still limited, but is quickly accelerating**
 - 91% have Windows 10 installed, but only 34% have it in production
 - 48% have Windows 10 on less than 10% of desktops
 - In 2015 only 7% had Windows 10 installed outside of IT, which grew to 51% in 2017
 - 77% will be fully migrated to Windows 10 within the next two years
- **Windows 10 concerns abound**
 - 87% have concerns about moving to Windows 10
 - 85% of those who have begun migration are facing issues
 - 80% say issues are delaying migration
 - 51% have not made a decision about their Windows 10 branch
- **User experience a top priority for Windows 10**
 - 83% are transitioning user personalization during their migration
 - 86% have plans to deliver desktop management capabilities for Windows 10
 - Only 16% report notably faster logon times



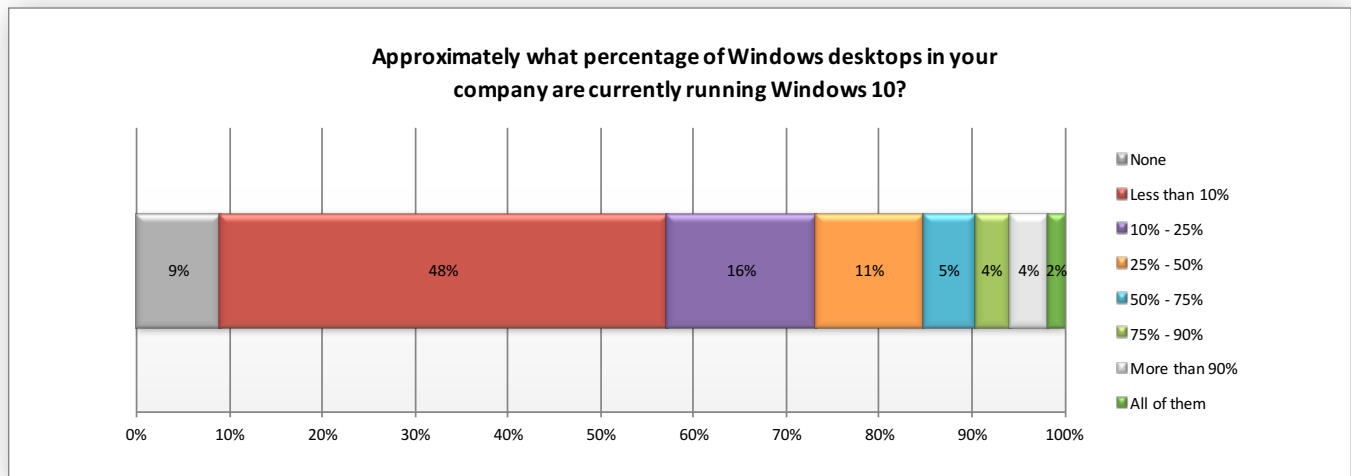
Detailed Findings: Windows 10 adoption still limited, but is quickly accelerating

Almost everybody has some Windows 10, but only some are in production

The vast majority of IT organizations, 91%, have Windows 10 installed. However, although released in 2015, there is wide variety in current levels of adoption. Just a third of IT organizations (34%) say they have Windows 10 in production, including only a few (10%) that characterize themselves as being fully in production. Most IT organizations are still in process of their full roll-out of Windows 10, with 17% being only at the pilot stage, 23% using it actively in IT to gain greater experience before exposing their end users, and 17% still using it only in a controlled lab environment.



Unsurprisingly, Windows 10 is not widely installed. Close to half of companies (48%), have Windows 10 on less than 10% of their desktops. Only a small number (15%) have Windows 10 installed on more than half of their corporate desktops. Unsurprisingly, the majority of companies who have Windows 10 widely installed are smaller organizations with fewer desktops or laptops to update.



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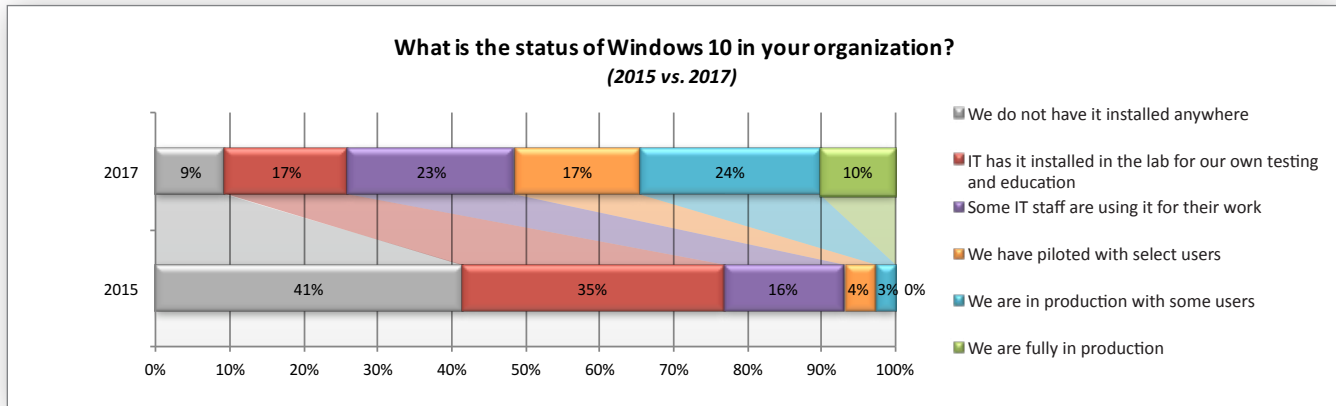


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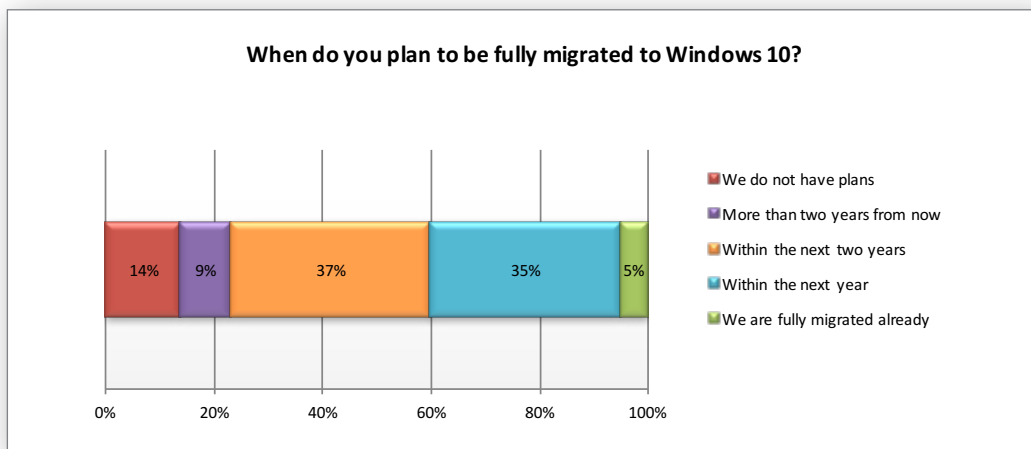
Windows 10 adoption is quickly accelerating

While it is far too soon to call Windows 10 a hit with IT, there are clear signs that adoption is accelerating quickly. A similar survey was run with this same audience late in 2015 asking this same question. Enormous gains have been made in the adoption of Windows 10 in just over a year. There were no companies that were fully in production with Windows 10 in 2015, so seeing that number increase to 10% in 2017 is notable. On the other end of the spectrum, 41% did not have Windows 10 installed anywhere in their company in 2015, so the drop to only 9% reporting the same in 2017 is particularly striking.

An important measure of adoption of Windows 10 is use by business stakeholders outside of the IT team. This measure also shows dramatic change in the past two years. In 2015, only 7% reported that Windows 10 was installed outside of IT as a pilot or production deployment. This same number grew to 51% in 2017.



There are specific plans in place to fully migrate to Windows 10. The vast majority of IT organizations (86%) report that they do have plans to fully migrate to Windows 10, although only 5% have already completed that step. Almost 3 in 4 (72%) have plans to fully migrate in the next two years, including 35% that will migrate within the next year and 37% that have plans to migrate the following year. Adding in the 5% that are already fully migrated, we can expect 77% to be fully migrated early in 2019.

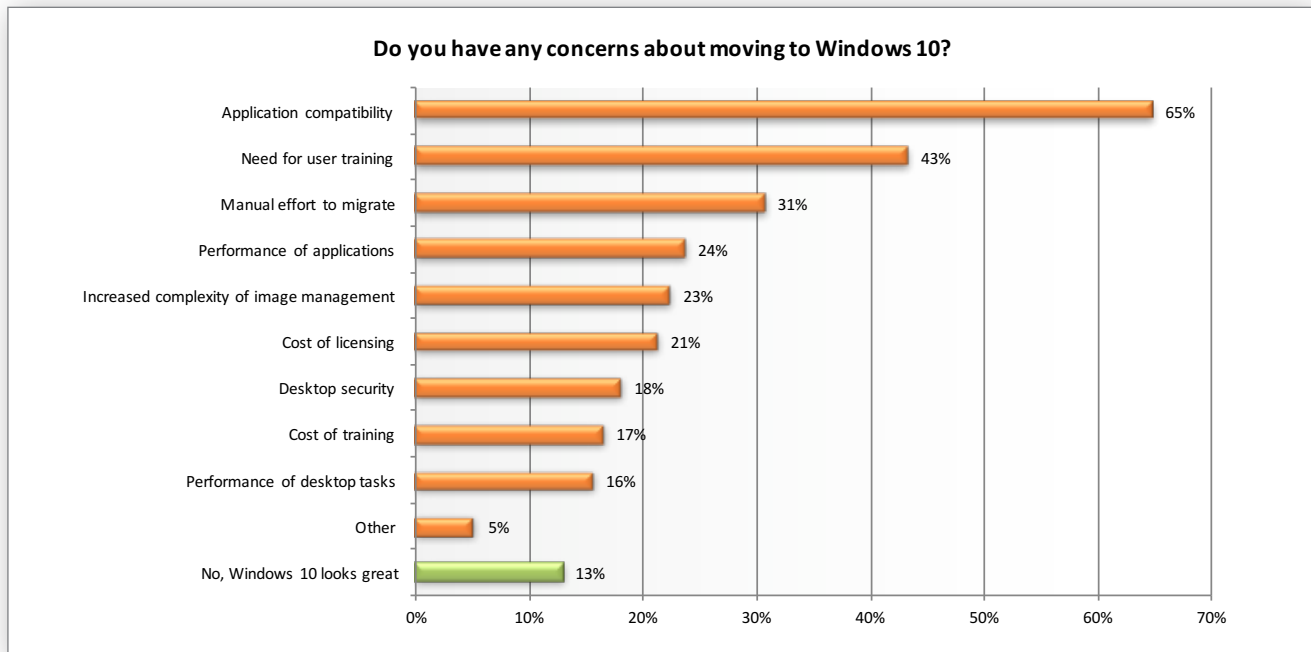




Detailed Findings: Windows 10 concerns abound Most have concerns about Windows 10

What's contributing to delays in migration to Windows 10? Before any significant migration, it is important to understand what might go wrong. Windows 10 is no exception, and there are worries about the impact of making a change this big.

Most IT professionals (87%) report concerns with the top issues including application compatibility (65%) and need for user training (43%). Other concerns ranged from manual efforts required to migrate, costs, security, and performance. Many participants took the time to write in "Other" concerns which include printer driver updates, compatibility with peripherals, configuration management and consistency of implementation, controlling patching, loss of control of security settings, too much passing information to Microsoft, and administration.

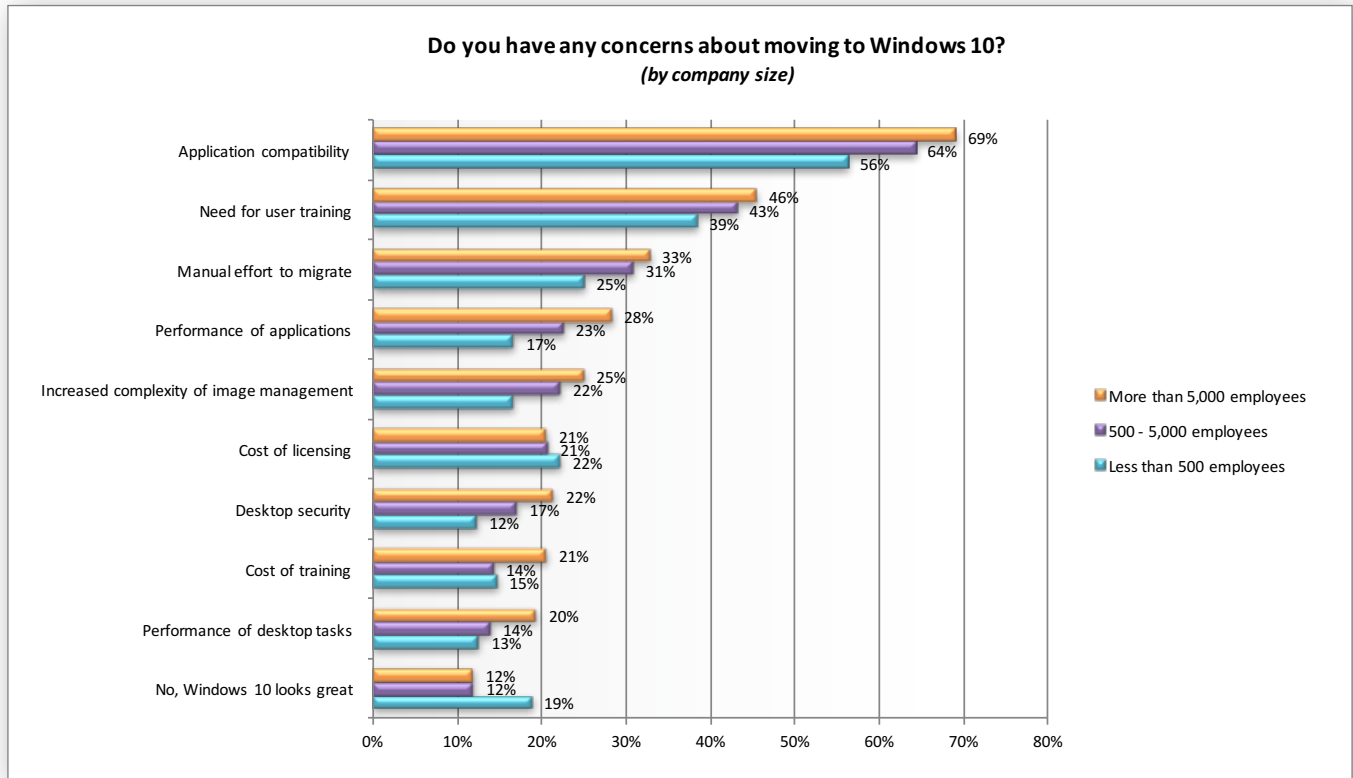


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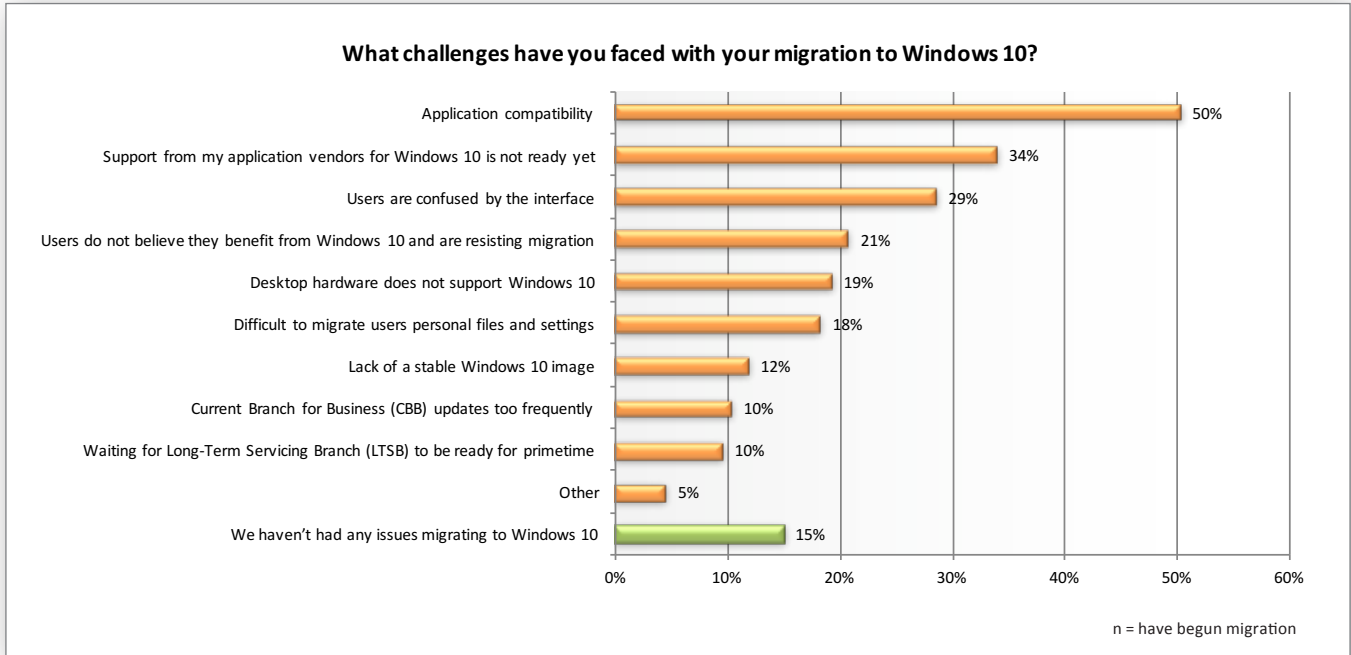
All of the reported concerns become more acute as company sizes increase. For example, more than 2 in 3 (69%) worry about application compatibility with Windows 10 at companies with more than 5,000 employees, compared to only slightly more than half (56%) at companies with less than 500 employees. And at the largest companies, many more IT professionals report that they have concerns – 19% compared to only 12% of those who work at smaller companies.





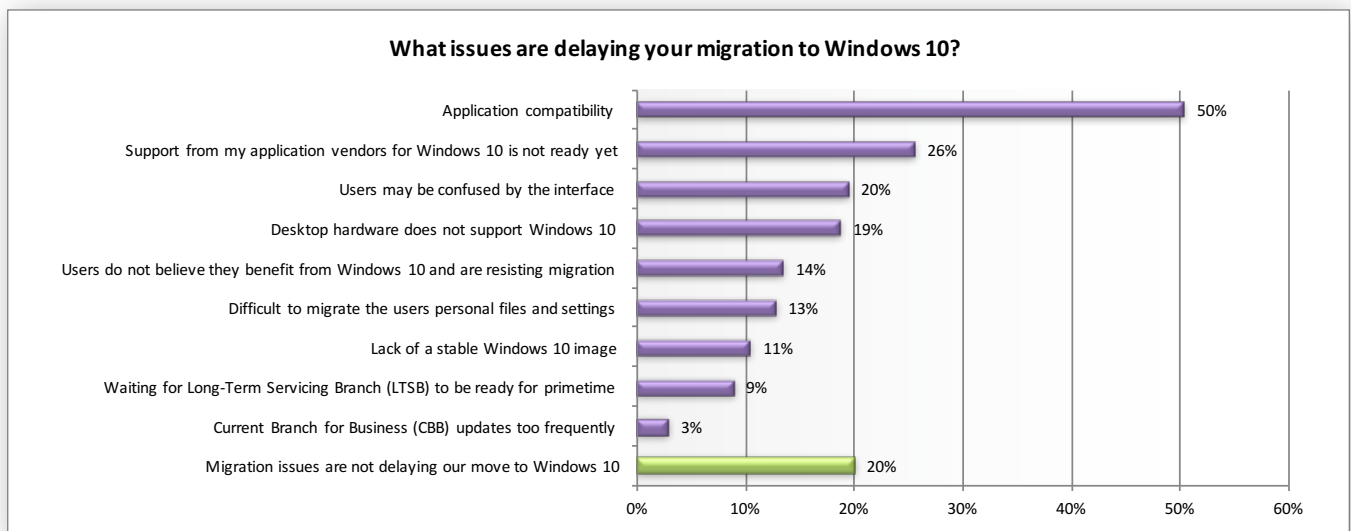
Migration to Windows 10 laden with issues

These concerns have been validated among those who have begun their migration. Most (85%) IT organizations that have started their migration have faced issues ranging from application compatibility and lack of support from vendors to user objections, hardware problems, difficulties migrating personal files, branch-related issues, and more.



Issues are delaying migration for many

While migration issues can be seen as a fact of life in IT, it is concerning that these issues are having a real impact on migration to Windows 10. Most IT teams (80%) have delayed their migration plans for Windows 10 as a result of these issues. The most common reason for delay reported is issues related to application compatibility (50%). User concerns, migration of personal files, and lack of stable images are also causing delays.



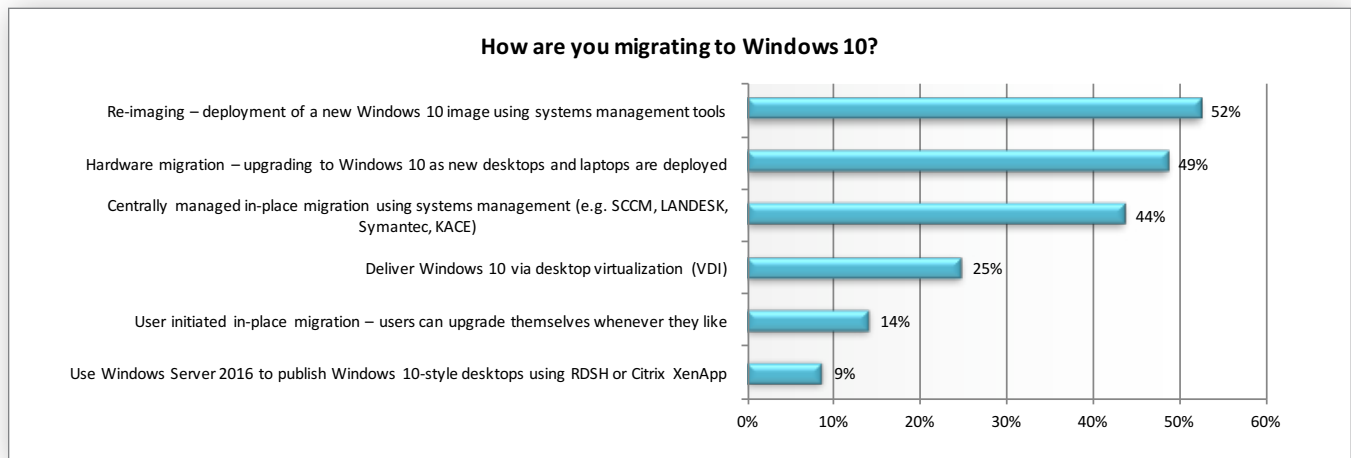
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Wide range approaches to Windows 10 migration being adopted

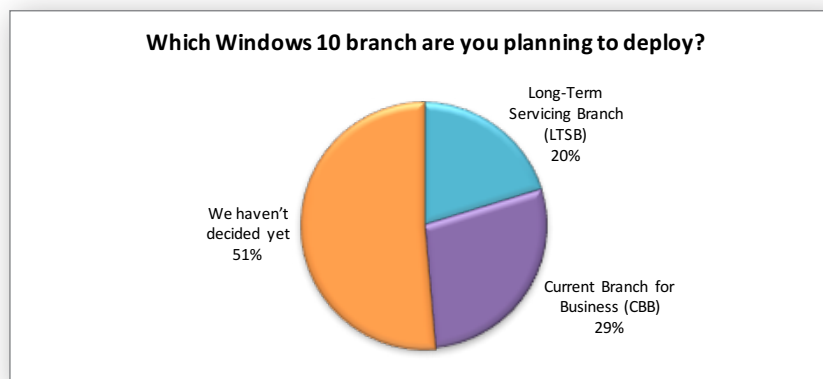
Most IT organizations have experienced multiple Windows migrations, and have formed strong opinions about the best approach. But interestingly, no single approach to Windows migrations has become the standard. Many different types of approaches are being used for Windows 10 migrations, including reimaging (52%), hardware migration (49%), centrally managed in-place migration (44%), and user initiated in-place migration (14%). Windows 10 is also being done virtually with a quarter of IT teams (25%) delivering Windows 10 via VDI and 9% using published desktops.



More than half haven't made a decision about Windows 10 branch yet

Microsoft has made significant changes in the way that it is updating the operating system for Windows 10. To offer flexibility to enterprises in adopting this new approach, Windows 10 enterprise customers have a choice between two servicing branches: Long-Term Service Branch (LTSB) and Current Branch for Business (CBB). This paper will not drill into the details of each option and their relative strengths as there are excellent sources available for that discussion, including Microsoft itself. This research focuses on the impact of these new service branch options on Windows 10 adoption.

The choice of Windows 10 branch is critically important to ongoing Windows management and must be made before rollout begins in earnest. However, it is clearly still an area that IT is not comfortable about since just over half (51%) report that they haven't decided yet which branch they will use.

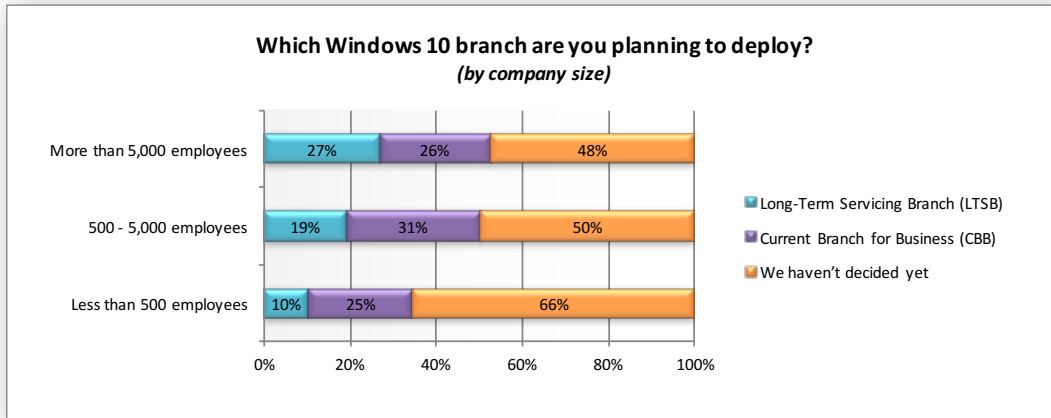


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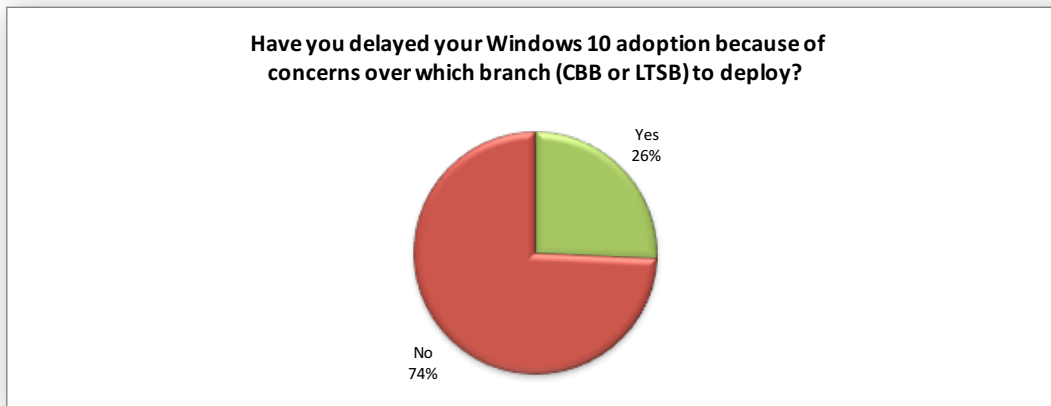
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Those who have decided aren't consistent with their preference. There are a few more IT teams choosing CBB (29%) than those who are choosing LTSB (20%) but neither has emerged as the clear choice. Even large companies are still undecided, and those who have decided are split evenly between LTSB (27%) and CBB (26%).



Branch concerns delaying Windows 10 adoption

While there is no clear consensus on branch usage, what is clear is that concerns about these branch choices are a factor delaying adoption. More than 1 in 4 (26%) of IT organizations are delaying their Windows 10 adoption at least in part because of confusion over which branch will be best for them.



Detailed Findings: User experience a top priority for Windows 10 Transitioning user personalization is the norm for Windows 10 migration

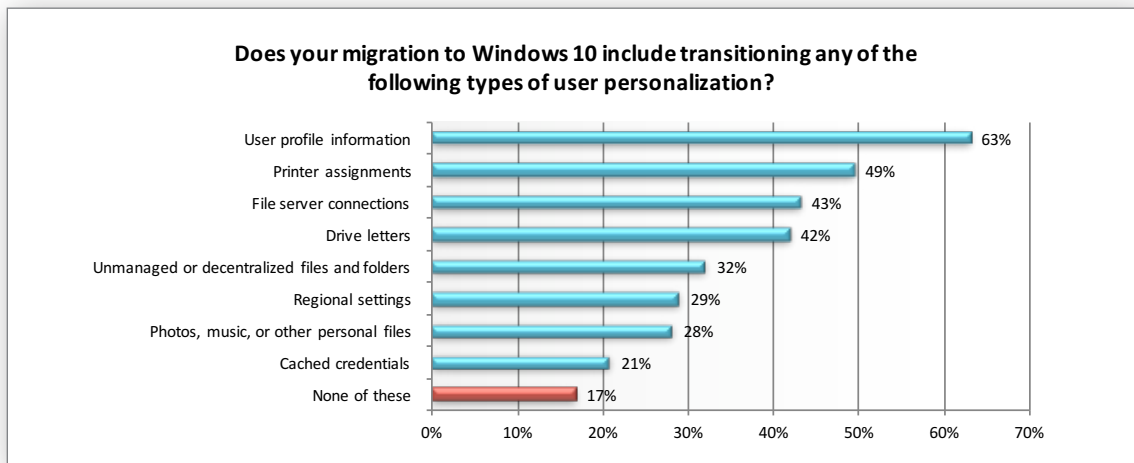
One of the most important ways that IT teams can make a significant change like a desktop migration less painful for their users is to ensure that personal settings are migrated. If a user expects to have to spend hours resetting their defaults or tracking down lost files, they will be unhappy about lost productivity and irritated when engaging with IT on any of the important issues that may arise from a migration. Ensuring that personalization follows the users has a direct, positive impact on user satisfaction post migration.

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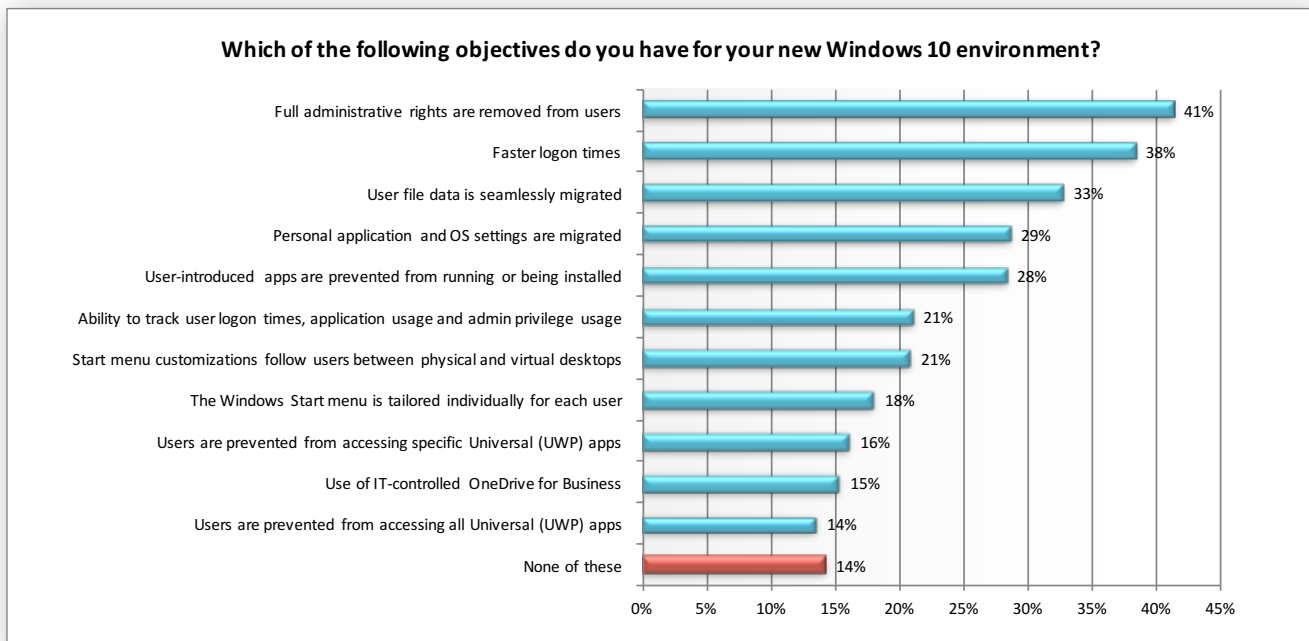
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IT has learned this lesson well over the years, and most (83%) have a plan to migrate user personalization when they move to Windows 10. The specific details of migrating personal information vary. The most common types of personalization to migrate are user profile information (63%), printer assignments (49%), file server connections (43%) and drive letters (42%). There are also organizations that will move even unmanaged or decentralized files or folders, regional settings, cached credentials and even photos and music.



Many user-impacting objectives for Windows 10

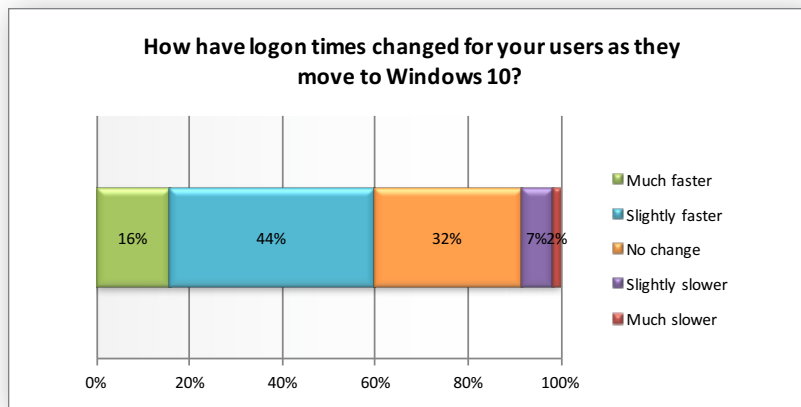
A migration to a new operating system can be a time to re-evaluate current approaches to desktop customization, desktop management, security, regulatory compliance, and other user-impacting policies. Windows 10 is no exception. Most corporate IT teams (86%) are planning to implement desktop management capabilities for Windows 10. The specific needs vary based on business requirements, but include a wide range of functionality including removing full administrative rights (41%), faster logon times (38%), migrating user data seamlessly (33%) and many more.





Notably faster logon times rare among Windows 10 users

It is particularly interesting that faster logon times are an objective for many (38%) organizations. Delivering speedy logon times so users do not waste time waiting is an important factor in employee productivity, especially when multiplied over a large number of employees or the lifetime of an employee's desktop use.



Windows 10 had hinted at huge gains in this area, but the actual outcomes have not matched those expectations – only a few (16%) have seen the much faster logon times that were desired. It's not all bad news – Windows 10 usually is at least slightly faster for users (44%), but for about a third (32%) there is no change and there are an unfortunate few (9%) who saw their logon times actually increase.

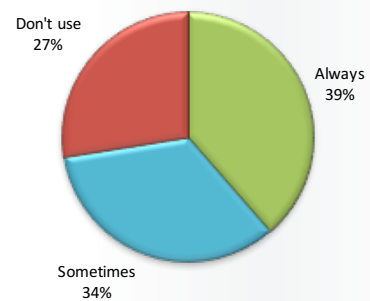
Survey Methodology and Participant Demographics

IT professionals were invited to participate in an online survey on the topic of experiences with Windows 10 and desktop management. Questions were asked on a wide range of subjects including current adoption of Windows 10, future plans, experiences, concerns and more.

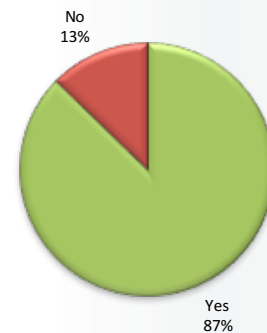
A total of 1826 qualified participants participated in the survey. All had decision-making responsibility for corporate desktops and laptops. A wide range of job levels, industries and company sizes were represented. This was a global survey and included participants from a wide range of countries including the United States, Canada, Australia, New Zealand, the United Kingdom, France, Germany, Spain, Italy, Austria, Belgium, Denmark, Finland, Iceland, Ireland, Italy, Luxembourg, Norway, Portugal, Spain, Sweden, Switzerland, and the Netherlands. The survey was fielded in English, French, and German.

How is IT managing Windows 10?

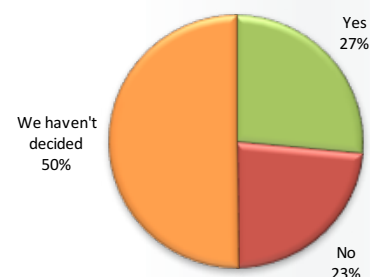
Use logon scripts



Use Group Policy



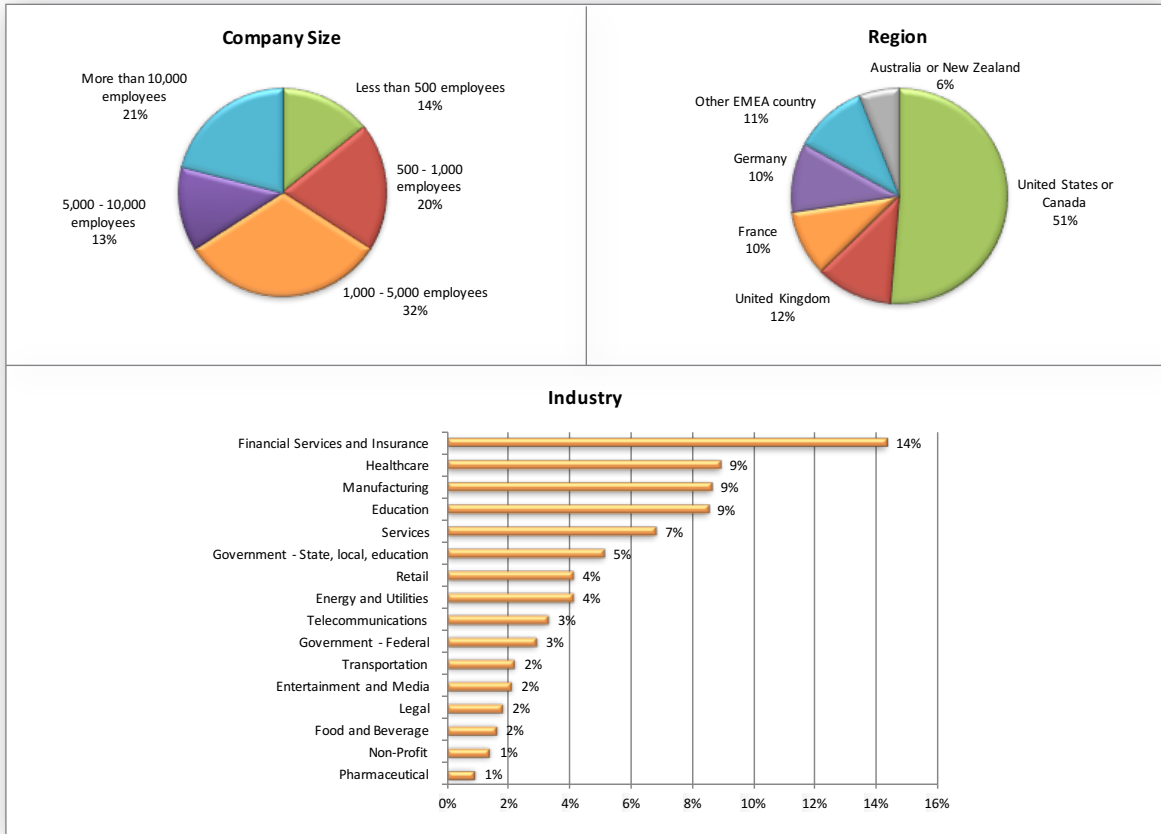
Use MDM-style management capabilities



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