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Parallels Cloud Survey 2025 Results

1. What industry do you work in?

	Total	USA only	Mid-sized Orgs
Consulting	1%	0,2%	1%
Architecture	1%	1%	1%
Education	6%	6%	8%
Financial Services	9%	9%	11%
Healthcare	8%	9%	8%
Government	2%	2%	2%
Legal	0.2%	0.2%	0.4%
Manufacturing	6%	5%	5%
Media and entertainment	0.3%	0.4%	0.4%
Retail	4%	3%	4%
Technology	55%	61%	57%
Other	4%	3%	5%

2. What best describes your business?

Question for only individuals that selected "Technology" in question 1

	Total	USA only	Mid-sized only
EUC software vendor	-	-	32%
ISV software vendor	33%	34%	-
Hardware vendor	7%	8%	8%
Managed Services Provider	30%	31%	30%
Customer of IT Services	23%	22%	24%
other	6%	6%	6%

3. Which country are you located in?

	Total	MSP only	Mid-sized only	Healthcare only
United States	84%	92%	82%	92%
United Kingdom	12%	5%	13%	8%
Canada	0.2%	-	-	
Australia	3%	3%	4%	
Germany	1%	-	1%	
France	1%	-	0.4%	

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4. What is your company size?

	Total	USA only	MSP only	Mid-sized only	Healthcare only
301-500	17%	16%	17%	37%	16%
501-1000	29%	28%	29%	63%	25%
1001-5000	38%	40%	35%	-	29%
5000+	17%	16%	20%	-	31%

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

Ranked 1-7, with 1 being the most important

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

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

Ranked 1-5, with 1 being the most important

	Total (Rank)	USA only	MSP only	Mid-sized only	Healthcare only
Requires too many IT resources	1	1	1	1	1
Lack of Centralized control	2	2	2	2	2
Too expensive	3	3	3	3	4
Too complex	4	4	4	4	5
Unreliable/performance issues	5	5	5	5	3

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

	Total	USA only	MSP only	Mid-sized only	Healthcare only
All installed	15%	15%	16%	16%	12%
75% installed 25% cloud-based SaaS	34%	35%	32%	35%	39%
50% installed 50% cloud-based SaaS	33%	33%	32%	32%	33%
25% installed 75% cloud-based SaaS	16%	16%	18%	14%	16%
All cloud-based% (SaaS)	2%	2%	3%	3%	-

8. What is the impact of SaaS on your organization?

	Total	USA only	MSP only	Mid-sized only	Healthcare only
Lower up-front costs	11%	12%	13%	12%	12%
Easier to manage	28%	29%	29%	31%	44%
Improved scalability	34%	34%	28%	30%	23%
Accessibility (from any device, anywhere)	13%	13%	13%	13%	12%
Enhanced security	12%	12%	15%	13%	9%
No choice – software we need only available as SaaS	1%	1%	1%	1%	-
Increase in costs	1%	1%	-	0.4%	-

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

	Total	USA only	MSP only	Mid-sized only	Healthcare only
Using antivirus and antimalware software	19%	18%	17%	19%	26%
Through firewall and network security solutions	55%	54%	58%	56%	54%
Manual oversight and policy enforcement	10%	10%	11%	12%	5%
Security awareness training for users	11%	13%	8%	7%	12%
Browser isolation technology	6%	5%	7%	6%	5%

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

	Total	USA only	MSP only	Mid-sized only	Healthcare only
Yes	58%	62%	55%	63%	39%
No	28%	26%	26%	23%	39%
Not sure	12%	12%	19%	15%	22%

11. What is your timeframe for implementation?*

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

	Total	USA only	MSP only	Mid-sized only	Healthcare only
0-3 months	20%	20%	21%	19%	21%
4-6 months	50%	50%	52%	49%	32%
7 months – 1 year	24%	24%	23%	26%	47%
More than 1 year	6%	6%	4%	6%	-

12. Are you running workloads in the cloud?

	Total	USA only	MSP only	Mid-sized only	Healthcare only
Yes, single cloud	15%	14%	11%	15%	18%
Yes, multi-cloud	50%	51%	48%	47%	49%
Yes, hybrid cloud (on-premises and single cloud)	32%	33%	39%	35%	27%
No, on-premises only	2%	2%	2%	2%	6%
Other	1%	0.4%	-	1%	-

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

	Total	USA only	MSP only	Mid-sized only	Healthcare only
No, we'll stay in the public cloud	14%	12%	17%	12%	12%
Considering	55%	45%	37%	49%	49%
Yes, in a hybrid model	27%	27%	25%	25%	30%
Yes, fully on-premises	14%	15%	20%	15%	9%
Other	0.3%	0.3%	-	-	-

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

	Total	USA only	MSP only	Mid-sized only	Healthcare only
Rising costs	42%	43%	54%	42%	47%
Uncertain product roadmaps	14%	14%	11%	13%	12%
Concern of future support	26%	26%	21%	26%	20%
Lack of integration	17%	16%	14%	18%	20%
Other	1%	1%	1%	1%	-

15. Where do you learn and research different end-user computing solutions for your IT environment?

	Total
Participation in user groups	11%
Industry events	20%
IT publications	40%
Google search	14%
Partner recommendations	11%
LinkedIn search	2%
Online forums (Reddit stack overflow)	3%
Other in-person events - please specify	1%

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

	Total	USA only	MSP only	Mid-sized only	Healthcare only
Yes	84%	85%	88%	81%	80%
No	7%	7%	5%	9%	14%
Yes, for specific cases	9%	8%	8%	11%	6%

17. How has hybrid working changed security posture?

Ranked 1-7, with 1 being the highest priority

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

18. What are your biggest security concerns?

	Total	USA only	MSP only	Mid-sized only	Healthcare only
Ransomware and malware attacks	39%	39%	44%	39%	39%
Cloud vulnerabilities	37%	38%	29%	39%	41%
Social engineering	9%	8%	5%	8%	2%
Human error (e.g., weak passwords, employee negligence)	16%	15%	23%	14%	18%

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

	Total	USA only	MSP only	Mid-sized only	Healthcare only
Yes	42%	44%	31%	35%	-
No	56%	54%	67%	63%	-
Yes, for specific cases	2%	2%	2%	2%	-

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20. What is the organization's current methodology for identifying potential risks and vulnerabilities?

	Total	USA only	MSP only	Mid-sized only	Healthcare only
Penetration Testing (Pentests)	27%	28%	25%	26%	29%
Vulnerability Assessment Program	49%	50%	54%	49%	49%
Attack Surface Management Program	19%	19%	19%	19%	18%
Bug Bounties	3%	3%	3%	4%	2%
Other (please specify)	0.3%	-	-	0.4%	-
Unsure	1%	1%	-	2%	2%

21. How frequently are risk assessments conducted?

	Total	USA only	MSP only	Mid-sized only	Healthcare only
Monthly	49%	49%	50%	47%	55%
Quarterly	45%	46%	45%	46%	41%
Annually	6%	5%	6%	7%	4%

22. What security policies are in place to secure data being shared internally or externally?

Ranked 1-8, with 1 being the highest priority

	Total (Rank)	USA only	MSP only	Mid-sized only	Healthcare only
Multi-Factor Authentication(MFA) Policies	1	1	2	1	1
Data Encryption Policies	2	2	1	2	2
Data Loss Prevention tools	3	3	3	3	3
Zero Trust Architecture	4	4	6	5	5
Cloud Security Posture Management (CSPM)	5	5	4	4	4
Access control policies	6	6	5	6	6
Secure file-sharing protocols	7	7	7	7	7
Other	8	8	8	8	8

23. What security technology are currently deployed?

Multi-answer	Total	USA only	MSP only	Mid-sized only	Healthcare only
Firewall	92%	92%	98%	93%	86%
VPN's	66%	66%	77%	63%	80%
Browser Isolation	42%	42%	41%	40%	39%
Enterprise browser	39%	40%	48%	33%	29%
Antivirus	70%	69%	79%	72%	74%
Other	0.3%	0.2%	-	0.4%	-

24. What is your organization's budget outlook for cybersecurity in 2025?

	Total	USA only	MSP only	Mid-sized only	Healthcare only
Increasing significantly	45%	46%	39%	41%	31%
Increasing moderately	43%	43%	46%	48%	59%
Remaining the same	11%	11%	16%	9%	8%
Decreasing	1%	1%	-	1%	2%