

# **A Peer Survey: Desktop Virtualization Separating the Hype from Reality**

**Conducted by IT Business Edge  
and Palmer Research**

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**By Debra Chin  
Senior Vice President  
Palmer Research**

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## Executive Summary

Since desktop virtualization originated with Terminal Services almost twenty years ago, new technologies such as blade PCs, application virtualization, virtual desktop infrastructure (VDI), and offline VDI have been developed to reduce the cost and complexity of desktop management even more. However, despite desktop virtualization's many benefits, many organizations have delayed deploying it.

Quest Software commissioned an online research study of IT Business Edge subscribers to assess the:

- Priority of desktop virtualization relative to other IT initiatives
- Adoption levels for desktop virtualization by technology type
- Key drivers and benefits of desktop virtualization adoption

According to the 575 North American respondents across all company sizes that completed the survey during March 2011, the most important drivers of desktop virtualization adoption were easy deployment and maintenance of applications, improved security/compliance, and reduced client hardware costs. Reducing the complexity/cost of PC management and simplification of Windows 7 deployment were also important. Once deployed, the respondents expected to achieve improved user productivity, enhanced security/compliance, and management/admin improvements.

However, it was clear that although desktop virtualization is a top priority for the majority of IT organizations, many have not moved beyond the proof of concept stage - less than one-third of the respondents have actually implemented desktop virtualization.

Although terminal servers, application virtualization, and virtual desktop infrastructure are the most commonly known and used technologies, it was difficult for many organizations to identify which solution would help them achieve the benefits of desktop virtualization most efficiently and cost effectively.

### *Desktop Virtualization Technologies*

- *Virtual Desktop Infrastructure (VDI) – the server environment for desktop virtualization*
- *Application Virtualization – software that runs programs virtually as though they are not on the local machine*
- *Terminal Server/RD Session Host – MS remote desktop hardware application*
- *Offline VDI – application that allows end-users to relocate their virtual machines to a local physical computer and back*
- *Blade PC – PC that plugs into a server environment*

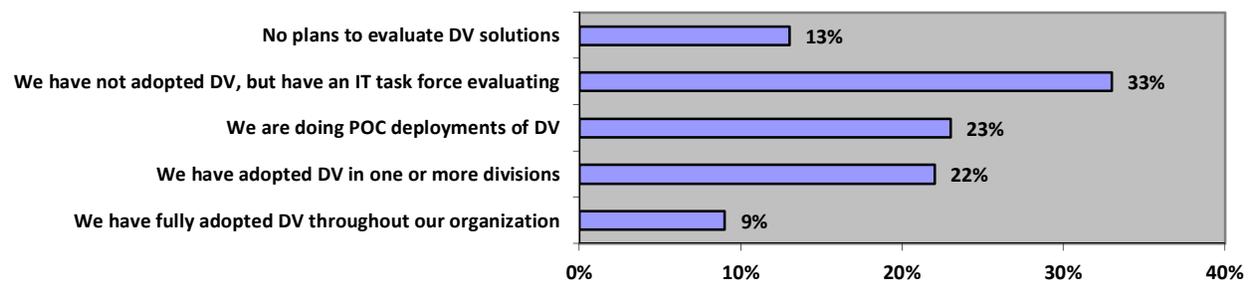
## Desktop Virtualization is Gaining Momentum

According to the 2011 ESG IT Spending Intentions Survey, desktop virtualization was the sixth most important IT initiative, up from eleventh last year. Desktop virtualization was considered the number one IT initiative for the next 1 – 2 years.<sup>1</sup>

Based on the 2011 survey data, actions do indeed follow intentions: 87 percent of IT Business Edge subscribers have implemented and/or are planning to implement a desktop virtualization solution compared to 68 percent of IT Business Edge subscribers polled in 2010.<sup>2</sup>

*Survey question: Please indicate which stage of evaluating desktop virtualization solutions your organization is currently involved in. N = 575*

**Figure 1: Stage of Evaluating Desktop Virtualization Solutions**



Larger companies are leading the way in the adoption of desktop virtualization solutions: 29 percent of small companies (<50 employees), 35 percent of medium-sized companies (50-999 employees), and 42 percent of large companies (>1,000 employees) have already implemented desktop virtualization. However, a higher percentage of small companies (46 percent) are now evaluating solutions.

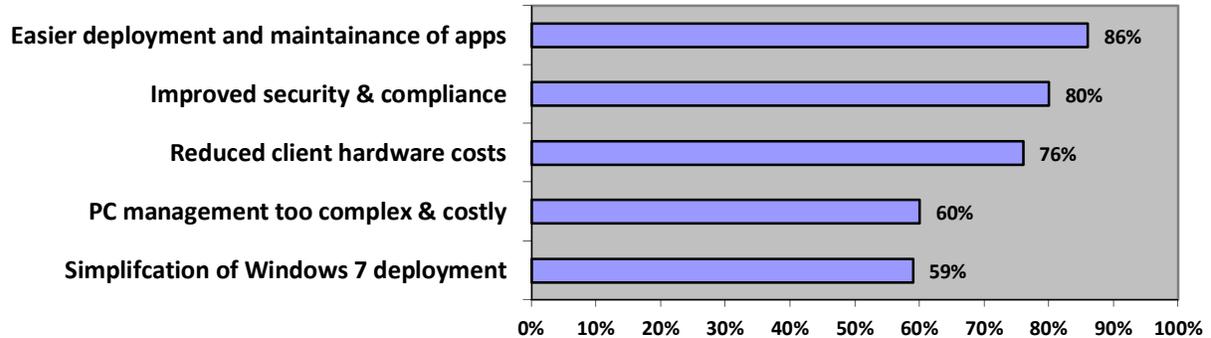
As shown in Figure 2, the most important drivers for adopting desktop virtualization are: easier deployment and maintenance of applications, improved security and compliance, and reduced client hardware costs. Reducing the complexity and cost of PC management and simplifying a Windows 7 deployment are also important drivers. The study shows that 50 percent of respondents will migrate their desktop users to Windows 7 in the next year, making this an opportune time to deploy desktop virtualization.

<sup>1</sup> ESG Research Report, *2011 IT Spending Intentions Survey*, November 2010

<sup>2</sup> IT Business Edge, *Desktop Virtualization Research*, August 2010

**Survey question:** Which of the following drivers are most important when considering the adoption of desktop virtualization in your organization, using a 5 point scale? N =498

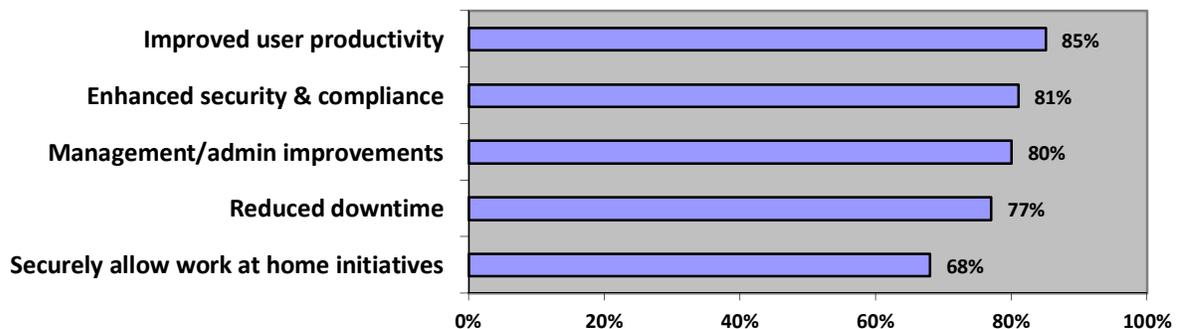
**Figure 2: Important Drivers for Adopting Desktop Virtualization**



When asked about the most important benefits of desktop virtualization, survey respondents rated improved user productivity, enhanced security and compliance, and management/admin improvements as the most important (see Figure 3).

**Survey question:** Please rate the importance of each of the following benefits of desktop virtualization for your organization on a 5 point scale. N =498

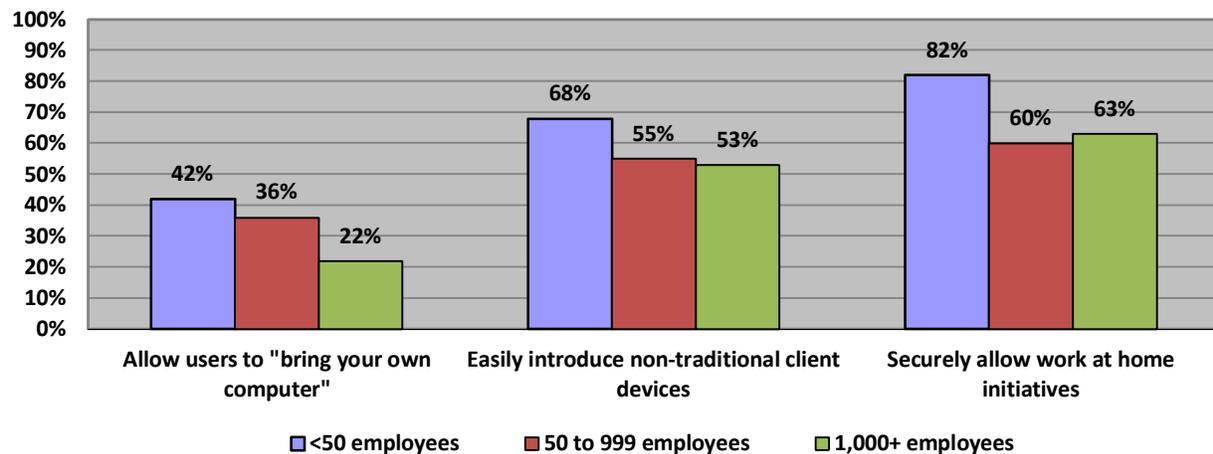
**Figure 3: Importance of Desktop Virtualization Benefits**



A significantly higher percentage of small company respondents rate end user flexibility benefits such as securely enabling work from home, easily introducing non-traditional devices, and allowing users to bring their own computers to work as important considerations for deploying desktop virtualization in their organizations (see Figure 4).

*Survey questions: Please rate the importance of each of the following benefits of desktop virtualization for your organization on a 5 point scale. N =498*

**Figure 4: Importance of Desktop Virtualization Benefits  
By Company Size**



As their workforces become increasingly mobile, IT organizations face new challenges supporting users beyond the traditional desktop. According to the survey, less than half of all employees are desk workers. Desktop virtualization solutions can help provide users with the access to applications and data they need from remote locations and mobile devices with the performance levels they expect in a secure, cost efficient manner.

## The Desktop Virtualization Technology Landscape

Nearly 100 percent of those surveyed who are considering desktop virtualization are at least somewhat familiar with the various technology solutions available. Table 1 shows the level of familiarity and usage rates of terminal servers, application virtualization, VDI, blade PC, and local/offline VDI. Consistent with the age of the technologies, terminal servers, application virtualization, and VDI are the most well-known. Respondents reported that they are using/evaluating a mix of different technologies in their organizations, with VDI being the most prevalent.

**Survey Questions:**

Please rate your familiarity with the following desktop virtualization technologies on a 5 point scale.  
1= Not at all familiar 5= extremely familiar. N =498

Which of the following desktop virtualization technologies are you currently using/evaluating?  
(Please check all that apply.). N =482

**Table 1: % Familiar and % Using/Evaluating Desktop Virtualization  
By Technology**

<b>DV Technology</b>	<b>% Familiar</b>	<b>% Using/Evaluating</b>
Terminal Servers	73%	51%
Application Virtualization	56%	61%
VDI	50%	72%
Blade PC	38%	15%
Local/Offline VDI	37%	16%

## Conclusion

Organizations are looking to desktop virtualization for IT and end users to achieve benefits such as improved productivity, security, and simplified management. The proliferation of non-traditional client devices along with increased workforce mobility has introduced new challenges for managing the desktop infrastructure.

Although VDI is the most popular technology, many different desktop virtualization technologies are available, and companies are evaluating and/or using various solutions. Because not every employee has the same desktop and application requirements, a blended deployment model based on user profiles can be the most cost-efficient and effective way to implement desktop virtualization.

The right management and access platform is integral to managing a desktop virtualization solution that combines multiple technologies. Quest<sup>®</sup> vWorkspace ([www.quest.com/vWorkspace](http://www.quest.com/vWorkspace)) enables IT managers to combine multiple desktop virtualization technologies into one easy-to-use integrated system for rapid, secure administration from a single console. Organizations can leverage old and new technology investments with vWorkspace's support for multiple hypervisors while achieving the lowest cost per user by applying the most appropriate desktop and application virtualization techniques.

With Quest vWorkspace, organizations can deliver desktop virtualization benefits to a diverse set of end users while reducing the complexity and costs associated with desktop management.

To get your project started in the right direction, get a free desktop virtualization assessment. Visit [www.quest.com/assessing](http://www.quest.com/assessing) and download a free assessment tool to help you:

- Identify which users are a best fit for Hosted VDI, Terminal Server/RD Session Host, off-line/local VDI, application virtualization and blade PCs
- Analyze and report on your current network, user and application usage

Pre-determine desktop, network, data center and storage needs to help build a successful plan to migrate users to virtual desktops and applications

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### **Palmer Research**

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### **Debra Chin**

Debra joined Palmer Research in 2006 as Senior Vice President. Her background includes executive level marketing and research positions for companies in the high tech, telecommunications, and consumer packaged goods industries. She holds an MBA from Columbia Business School and a BSE in Economics from the Wharton School of Business.

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