Survey: x86 O/S Usage – Microsoft Strong but Linux Surges

As part of our 2010 GCG x86 Server Vendor Preference Survey (details here), we asked respondents a lot of questions about their x86 operating environments. One set of questions asked about the relative share of the major x86 operating systems (Microsoft, Linux, Solaris64) in their data centers. Our goal wasn't to use these results to ascertain overall market share; we wanted to see what these particular 199 customers are using, and what their future plans are with respect to each operating system.

In this first question, we ask what they're using….

O/S Usage: Microsoft Server

2010	Not using	1-30% of systems	30%-50%	50% or more
2010	13%	21%	13%	54%
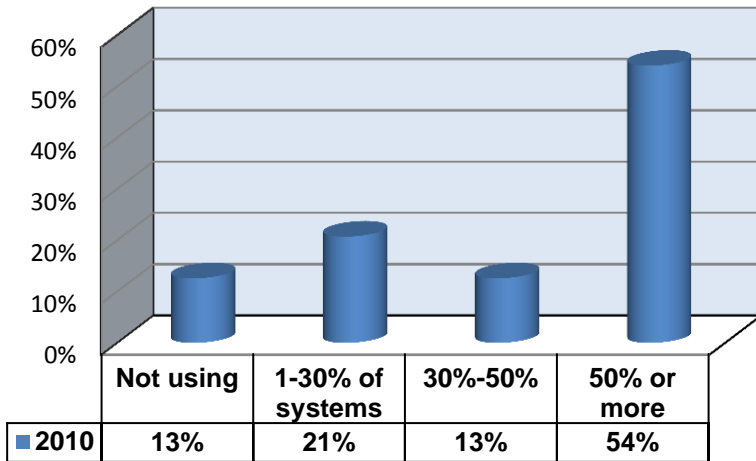
As can be seen from the chart, Microsoft Server operating systems are heavily used by our respondents. More than half run Microsoft environments on most of their systems, and 87% have at least some systems running Microsoft products.

These numbers have changed a bit from our last survey. We've seen the number of enterprises *not* using any MS environments move from 6% in 2009 to 13% in 2010. Two data points don't necessarily mark a trend, but it does bear watching.

O/S Usage: Linux (any flavor)

2010	Not using	1-30% of systems	30%-50%	50% or more
2010	10%	47%	21%	22%
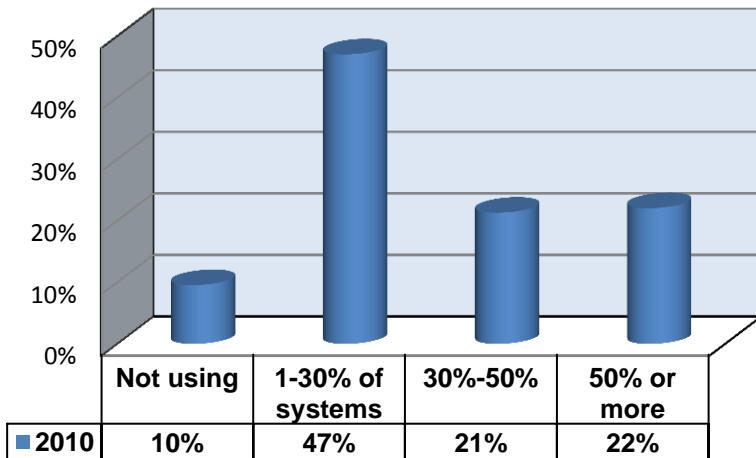
Fully 90% of our enterprise respondent base are running at least some Linux in their environment – which is a bit of a surprise, and shows just how far Linux has come in the last decade. In our last survey, 84% of respondents reported using at least some Linux in their organization, so this is a fairly big change.

The 10% of respondents not using Linux tend to be very small data centers in very small organizations which are running MS environments exclusively.

O/S Usage: Solaris x64

|	Not using	1-30% of systems	30%-50%	50% or more
■ 2010	73%	20%	2%	5%
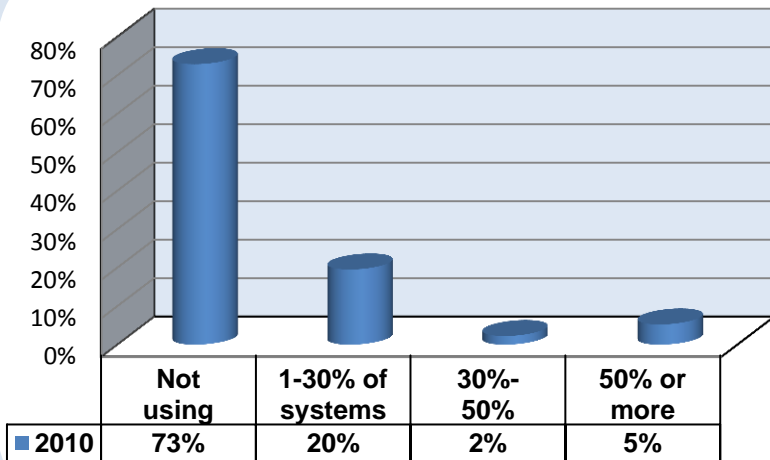
Our survey did pick up some Solaris x64 usage, albeit not as much as in previous years. In this survey, slightly more than a quarter of respondents are using Solaris x64 somewhere in their data center. In our last survey, almost half of our respondents had at least some Solaris x64 usage.

The difference could be due to different survey populations year to year, but it's safe to say that overall usage of this operating system has dropped off at least to some degree over time.

The vast majority of customers have coexisting Windows and Linux environments, which we're sure doesn't surprise anyone. But the results from the next question, which asks about their future usage, certainly might raise a few eyebrows...

O/S Usage Futures: Microsoft Server

|	Less	Not sure	Same	More	A lot more
■ 2010	24%	1%	49%	17%	9%
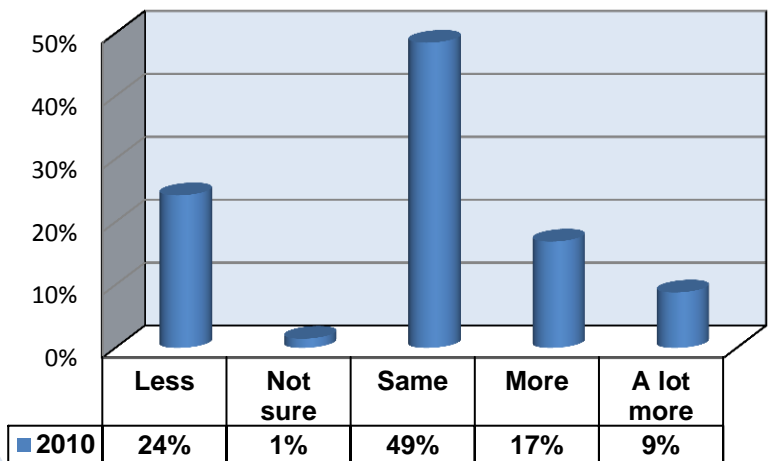
Almost a quarter of our survey respondents will be reducing their Microsoft Server operating system usage in the next year. This is a significant increase over last year, when only 20% said they were moving away from MS environments.

On the positive side, 26% see themselves deploying more MS in their organization; about half of them see MS usage staying at the same level.

Again, this isn't necessarily a wholesale trend away from MS products, but it does bear watching.

O/S Usage Futures: Linux (any flavor)

	Less	Not sure	Same	More	A lot more
■2010	10%	3%	36%	33%	18%
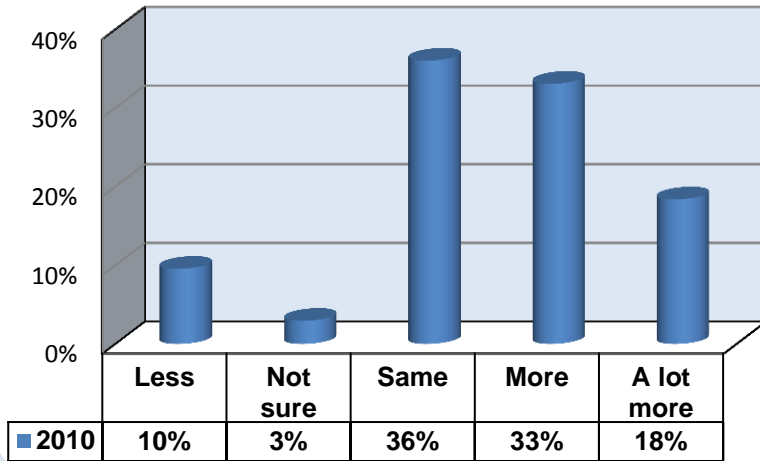
Customers in our survey will be using a lot more Linux in the near future, as can be seen by the accompanying chart. Only 10% anticipate using less Linux, while more than half (51%) say that they will be using more or a lot more Linux over time.

These results are significantly different than what we saw in 2009, when 42% said they'd be using more Linux, and 14% said less. While Linux has been a solid and growing mainstream Microsoft alternative, it's a bit surprising to see a surge of this magnitude.

O/S Usage Futures: Solaris x64

	Less	Not sure	Same	More	A lot more
■2010	40%	17%	35%	6%	2%
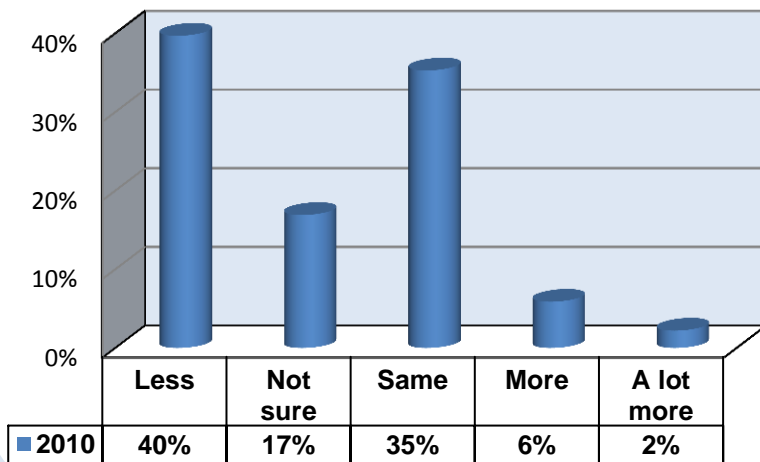
We see significant erosion in the Solaris x64 user base, with 40% of current users saying that they will be using it less in the near future. What's particularly troubling is that very few say that they will be using it more.

In these surveys, we see a lot of churn – some customers moving away from products/vendors while other customers move to embrace them. But in order for a product to be successful, the churn has to go both ways. In short, if you're not attracting new, enthusiastic users, you're in trouble.

Linux looks to be on an upswing, Microsoft is mostly holding steady but showing some vulnerability, and Solaris x64 is definitely in trouble. Oracle has their work cut out for them.

If you're interested in finding out more about this survey (demographics, expanded results, detailed GCG analysis), click here.

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