

SIGNAL65 INSIGHTS

The Case for PC Confidence in 2026

How Consumer Resilience and Platform Innovation Reframe the Growth Story

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Introduction

The PC industry entered 2026 holding its breath. Component costs have gone up, OEM prices have moved, and consumer headlines have framed the year as a stress test. The default posture across the market has been one of caution.

Our results and recently reported data tells us a different story.

Three numbers anchor this report.

92%

of buyers remain addressable
even at +30% pricing

Futurum Group, March 2026

UP TO

7.2x

faster than a typical
5-year-old PC.

Signal65 Lab Testing

340M

PCs sold worldwide in 2021, now
entering their refresh window

Gartner, IDC

92%. The percentage of consumer PC buyers who remain addressable even at a 30% price increase, according to a Microsoft-commissioned [global study conducted by Futurum Group in March 2026](#). Demand is not collapsing. It is shifting and adapting within the category.

7.2x. The multi-thread CPU performance advantage of a 2026 Snapdragon X2 laptop over a representative five-year-old notebook, in our testing. The 2026 generation is not an incremental improvement. It is a significant leap that users feel the moment they open the lid.

340M. The number of PCs sold worldwide in 2021, the largest annual PC volume in nearly a decade, driven by the pandemic-era surge in remote work and learning setups. According to Gartner, worldwide PC shipments reached 339.8 million units in 2021. IDC put the figure even higher at 348.8 million units. ([Source](#).) With the typical PC refresh cycle running approximately five years, that 2021 cohort is now entering its replacement window in 2026. The opportunity is sizable on the 2021 cohort alone, and the addressable market is larger still when adjacent-year populations and Windows 10 holdouts are layered on top.

The headwinds are real. The demand response to those headwinds is not what the fear narrative says it is. The 2026 silicon platforms are genuinely better, in ways that translate to user experience.

For OEMs, channel partners, and silicon suppliers planning their 2026 investment, this Signal65 report makes a specific argument that the buyers are there, the platforms are ready, and the reason to refresh is on the calendar. This year rewards confidence, not retreat.

The Headwinds are Real, but the Fear is Misread

Cost pressures across the PC bill of materials appear to be meaningful. Industry commentary suggests that AI infrastructure buildouts at hyperscale may be contributing to increased demand for memory, with potential downstream effects on DRAM and NAND availability for consumer devices.

Against this backdrop, PC manufacturers have publicly communicated pricing adjustments to channel partners and customers. Industry sources indicate major Windows PC vendors raised commercial channel pricing on the order of 15% to 20% in late 2025, with additional pass-through actions rolling into early 2026 (Source). Smaller PC makers have communicated similar adjustments, with several publicly acknowledging that supplier cost increases would need to flow through to end pricing (Source).

The default modeling assumption embedded in many 2026 forecasts is unit elasticity of negative one. A 30% price increase produces a 30% volume decline. The math is clean and with it the conclusion is grim. But our view, and the data we are finding, shows that the assumption is wrong.

PCs are not discretionary purchases that follow consumer-goods elasticity curves. They are essential infrastructure for work, education, and daily life, with no clean substitute. When buyers face price pressure, they trade down within the category, time their purchase to a sale event, or move to a refurbished tier. They do not exit the market.

The headwinds are real. The 1-to-1 elasticity assumption behind the fear narrative is not.

The next section of this report quantifies what a survey of consumers say they will do under price pressure, drawing on what we believe is the largest qualitative consumer study of the 2026 PC market published to date. The findings reset the conversation.

Demand Resilience: What Buyers Actually Said

Futurum Group conducted a global qualitative study, commissioned by Microsoft, of active PC buyers in March 2026, spanning North America, Europe, and APAC, covering purchase intent, price sensitivity, brand preference, and feature priorities. The full executive summary is available separately. This section draws the implications most relevant to 2026 partner planning.

The Headline Finding: 92% Remain Addressable

Across every tested price scenario, including a 30% increase, the response of survey respondents was remarkably consistent. Approximately 92% of survey respondents said that they would find a way to stay in the PC market. Only 8% surveyed said they would exit permanently.

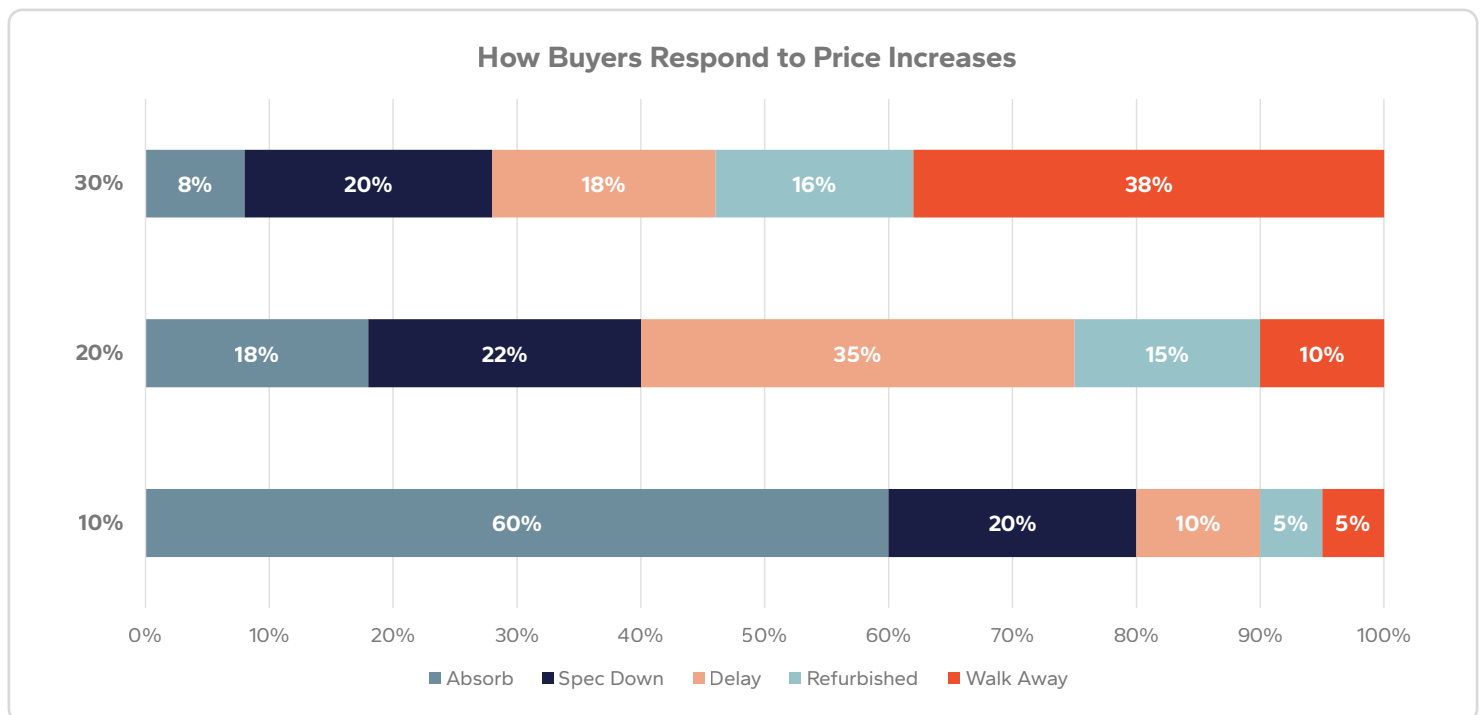
The 92% sort themselves into four behaviors.

- **Absorb.** Pay the higher price.
- **Spec down.** Move to a lower tier in the same brand.
- **Delay.** Wait for a sale event or budget alignment, then buy.
- **Refurbished.** Move to a certified pre-owned channel.

Three of those four behaviors would still result in a PC sale. The fourth, delay, defers the sale rather than killing it.

The Behavioral Curve, by Price Increase

At a 10% to 15% increase, 85% of buyers said they would proceed with minimal behavioral change. The market holds. At 20%+, the mix shifts to spec-down and delay, but 90% indicated they remain engaged. At 30%, the picture is the most informative one. 8% of buyers said they would absorb the price, 20% spec down, 18% delay, 16% move to refurbished, and 38% would walk away from a specific purchase. Of that 38%, only 8% said they would leave the category entirely. The other 30% return when a different price point or product reaches them.



Source: Futurum Group analysis of 462 AI-moderated consumer interviews (NA 151, Europe 152, APAC 159), March 2026

I would still buy it. A hundred dollars more is not going to stop me if I need a new computer.

— Buyer, North America, Futurum study

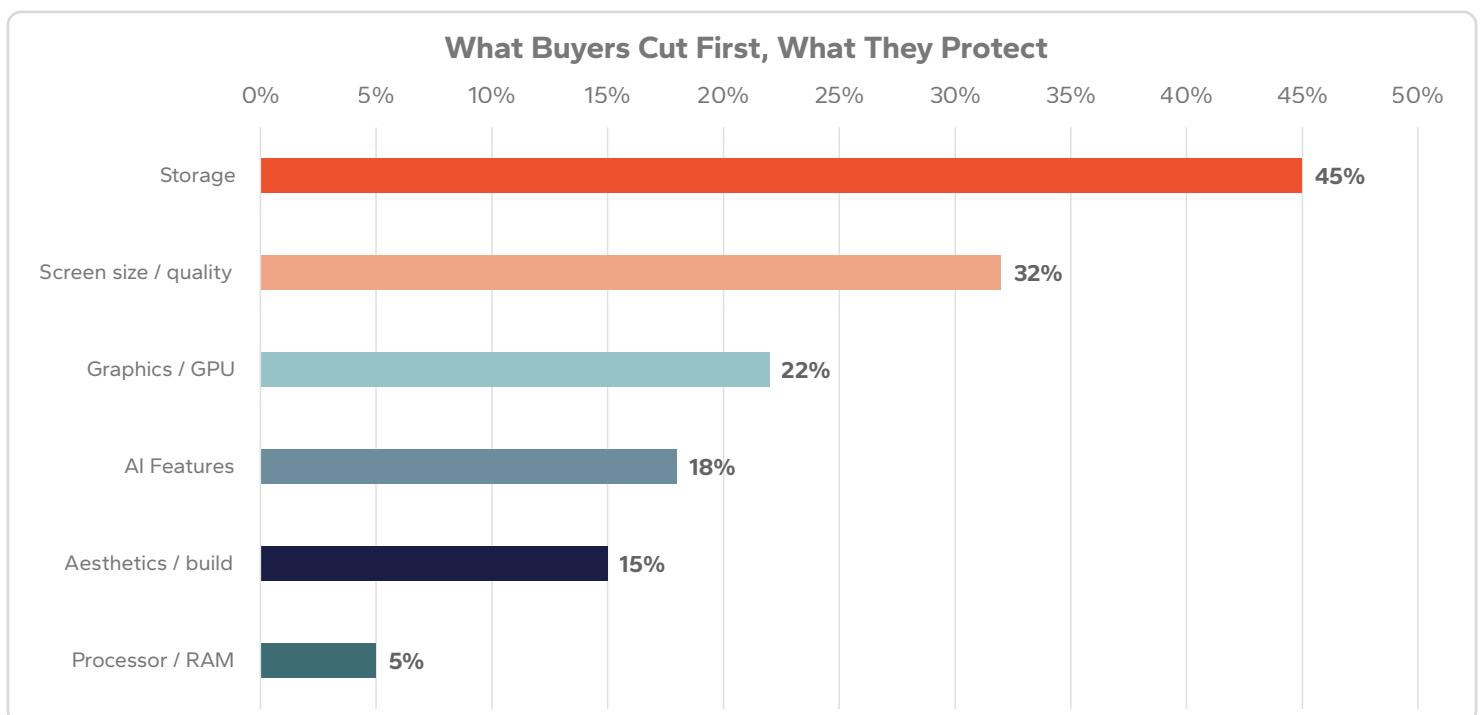
Platform loyalty is high. Defection is rare.

When buyers face price pressure, they overwhelmingly stay within their preferred ecosystem. 88% of Windows buyers in the Futurum study indicated they would remain on Windows under any tested scenario. Price pressure moves Windows buyers down the product ladder, from premium to mid-range or from new to refurbished, not across to a competing platform.

This is consequential for OEMs. The buyer who would have purchased a \$1,500 system at full price under stable conditions is still buying a Windows PC under price pressure. They are buying a \$900 system, or last year's chassis, or a certified refurbished unit. Brand and ecosystem capture is intact. Brand and ecosystem capture remains intact, total revenue per buyer compresses, but unit volume holds.

What Buyers Cut, and What They Protect

When forced to choose, buyers sacrifice peripheral specs and protect core performance. Storage tops the list of components buyers will downgrade at 45% of respondents, followed by display size and quality (32%), graphics (22%), and AI features (18%). Processor and RAM, the components most directly tied to perceived system responsiveness, sit at the bottom of the list at just 5%.



Source: Futurum Group, March 2026. Buyers could select multiple components.

*I can always get an external hard drive. But a slow processor?
That ruins everything.*

— Buyer, Europe, Futurum study

The implication for product strategy is to build entry tiers around the components buyers are willing to compromise. Lead with strong CPUs and adequate memory and treat AI features as standard rather than as a premium upcharge.

Regional Patterns Inform Channel Strategy

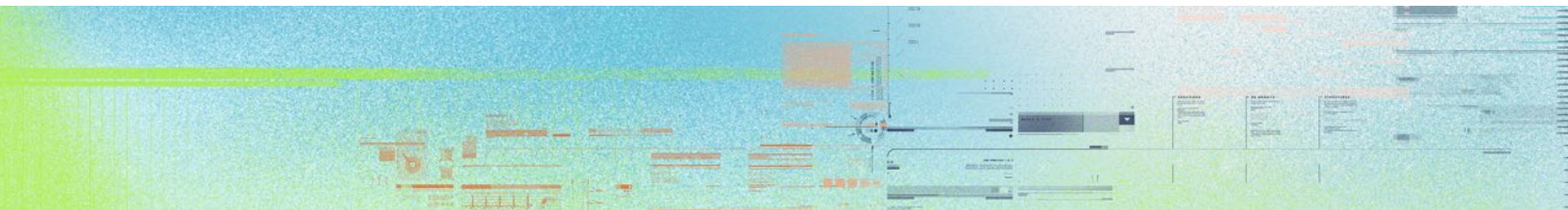
The 92% addressable headline holds across all three regions, but the path to capture differs. Europe is the most deal-driven and the most refurbished-friendly market, with 89% of buyers open to certified refurbished and the longest delay tolerance. North America is the most polarized, with budget-rigid buyers under \$600 coexisting with price-insensitive professionals who do not blink at premium pricing. APAC is the most work-urgent, with buyers least willing to delay, least receptive to financing, and with significant nuance around Chinese brand preference and government subsidy programs.

What the Data is Saying

Demand is resilient, demand shifts, but demand does not collapse.

The behavioral mix at a 30% increase still results in a PC sale for two thirds of the buyer base. Even the buyers who walk away from a specific purchase predominantly return on a different timeline or at a different tier. Permanent market exit is a single-digit percentage outcome.

The implication for 2026 planning is specific. A partner that assumes 30% volume loss in response to price pressure will under-stock, under-promote, and under-staff a market where 92% of buyers are still in motion. The risk in 2026 is not over-investment. It is investing for the wrong demand curve.



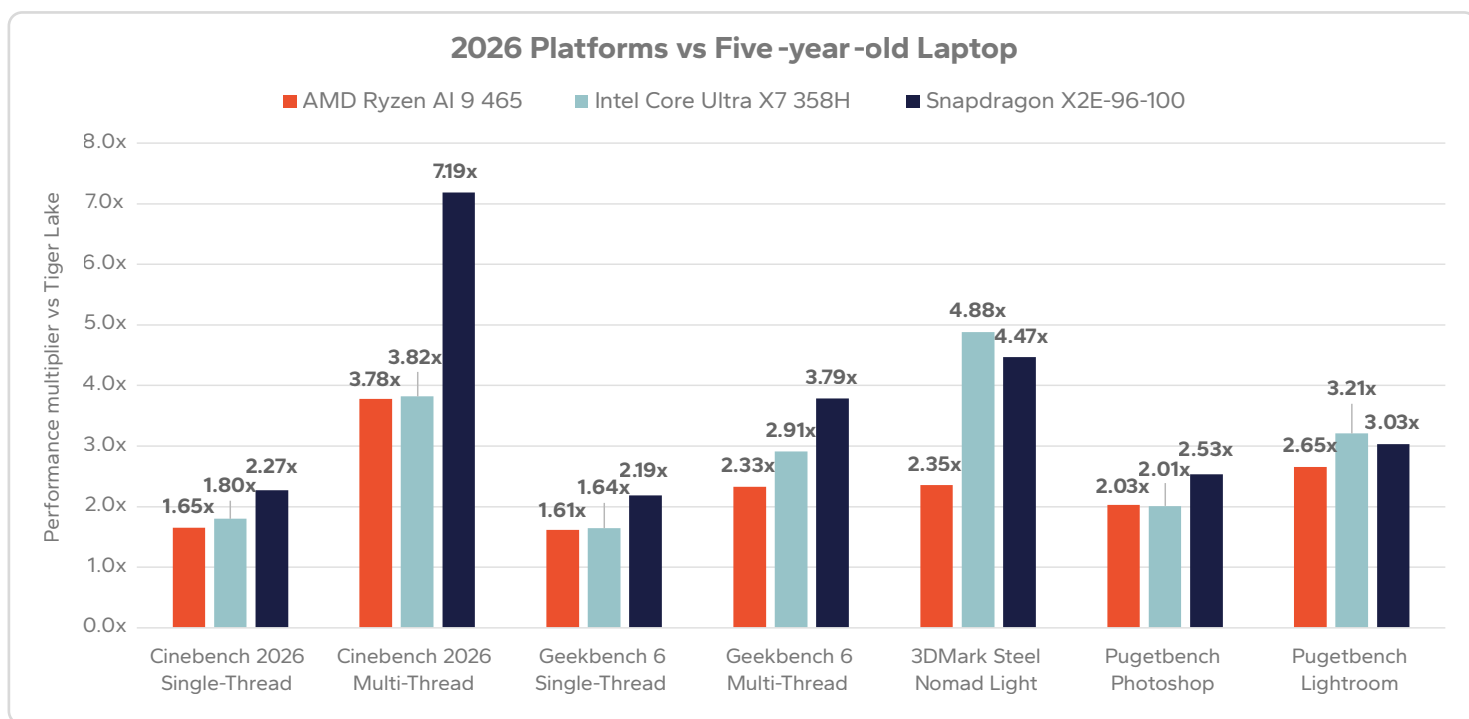
The 2026 Platform Tailwind

The case for refresh in 2026 is partly economic, driven by the Windows 10 transition and an aging installed base. It is also performance-driven in a way the industry has not been able to claim for several years.

Signal65 evaluated three 2026 silicon platforms in our lab against previous-generation predecessors and against a representative five-year-old reference system, a Samsung Galaxy Book Pro 15 powered by an 11th-generation Intel Core i7-1165G7 (Tiger Lake). The five-year reference is a deliberate choice. According to Gartner and IDC, approximately 340 million PCs shipped worldwide in 2021, and the typical five-year refresh cycle places that cohort squarely in its 2026 replacement window. These are the systems most likely to refresh in 2026, and they are the population the Tiger Lake reference attempts to represent.

The AMD Ryzen AI 9 HX 465 and Intel Core Ultra X7 358H comparisons in this report span two silicon generations against their tested predecessors. AMD shipped Strix Point and Krackan Point between Hawk Point and Gorgon Point, and Intel shipped Lunar Lake between Meteor Lake and Panther Lake. The Qualcomm Snapdragon X2 comparison is a true single-generation step over the Snapdragon X Elite, since Qualcomm has not shipped an intervening flagship between the two. We use the longest available comparison on AMD and Intel because it best represents the upgrade decision facing the buyer of a 2024 or earlier system, which is the population most likely to refresh this year.

The 2026 platforms are not modestly better. They are dramatically better, across the dimensions users feel daily.



Source: Signal65 lab testing. Higher is better. Tiger Lake reference: Samsung Galaxy Book Pro 15 with Intel Core i7-1165G7

Across CPU, graphics, content creation, and productivity workloads, the gap between the 2026 generation and a representative five-year-old laptop ranges from approximately 1.3x to more than 7x. The chart above summarizes the headline deltas. The platform-by-platform sections that follow break out the gen-over-gen story for each silicon vendor.

AMD Ryzen AI 9 HX 465 (Gorgon Point)

Tested in the HP OmniBook 5 and compared against an earlier generation Ryzen 7 8845HS in the HP Pavilion 14, and against the Tiger Lake 5-year-old reference laptop.

Generational Highlights, in Our Hands-on Testing

- **Cinebench 2026 multi-thread:** +24%
- **3DMark Steel Nomad Light:** +36%, driven by RDNA integrated graphics
- **Puget Bench Photoshop:** +26%
- **Procyon Office Productivity overall:** +20%, with Word at +34%
- **Local video battery rundown:** more than 2x earlier gen (23.4 hours vs 11.0 hours)

Versus Five-year-old Laptop, in Our Testing

- **Cinebench 2026 multi-thread:** 3.78x
- **Geekbench 6 multi-thread:** 2.33x
- **3DMark Steel Nomad Light:** 2.35x
- **Puget Bench Photoshop:** 2.03x
- **Puget Bench Lightroom Classic:** 2.65x

The AMD storyline is a productivity-and-graphics tailwind. Office productivity gains are double-digit and 30% above Tiger Lake. The RDNA-driven graphics jump opens light gaming and on-device content creation workflows that did not exist on the five-year-old reference. The battery life step-up against the older generation is among the largest improvements we have measured, and it materially changes the day-of-use story for a Ryzen-based laptop.

Intel Core Ultra X7 358H (Panther Lake)

Tested in the Dell XPS 16. Compared against an older generation Core Ultra 7 155H (Meteor Lake) in the MSI Prestige 16, and against the Tiger Lake reference.

Generational Highlights, in Our Hands-on Testing

- **Cinebench 2026 multi-thread:** +12%
- **Geekbench 6 multi-thread:** +32%
- **3DMark Steel Nomad Light:** +88%, driven by Xe3 integrated graphics
- **Puget Bench Premiere Pro:** +102%, more than 2x improvement
- **Puget Bench After Effects:** +44%
- **Procyon AI Computer Vision NPU integer:** 3.38x
- **Geekbench AI NPU quantized:** 4.47x
- **Procyon Office Productivity overall:** +15%

Versus Five-year-old Laptop, in Our Testing

- **Cinebench 2026 multi-thread:** 3.82x
- **3DMark Steel Nomad Light:** 4.89x
- **Puget Bench Premiere Pro:** 3.31x
- **Puget Bench Lightroom Classic:** 3.21x
- **Procyon Office Productivity overall:** +48%

The Intel Core Ultra 300 series is a very balanced generational story in our data. The CPU gains are solid double digits. The graphics jump is the most significant iGPU improvement we have measured on an Intel platform in recent memory. The Premiere Pro result, more than twice the older generation throughput and more than three times Tiger Lake, makes this a highly credible creator and prosumer story. The NPU jump of more than 4x is a step-function move that gives Panther Lake-based Copilot+ PCs meaningful AI headroom.

Qualcomm Snapdragon X2E-96-100

Tested in the ASUS Zenbook A16. Compared against the prior-generation Snapdragon X Elite (X1E-84-100) in the Samsung Galaxy Book 4 Edge, and against the Tiger Lake reference.

Generational Highlights, in Our Hands-on Testing

- **Cinebench 2026 single-thread:** +19%
- **Cinebench 2026 multi-thread:** +93%
- **Geekbench 6 multi-thread:** +39%
- **3DMark Steel Nomad Light:** 2.32x
- **Puget Bench Photoshop:** +42%
- **Puget Bench Lightroom Classic:** +68%
- **Procyon AI Computer Vision NPU integer:** 2.14x
- **Geekbench AI NPU quantized:** 2.09x

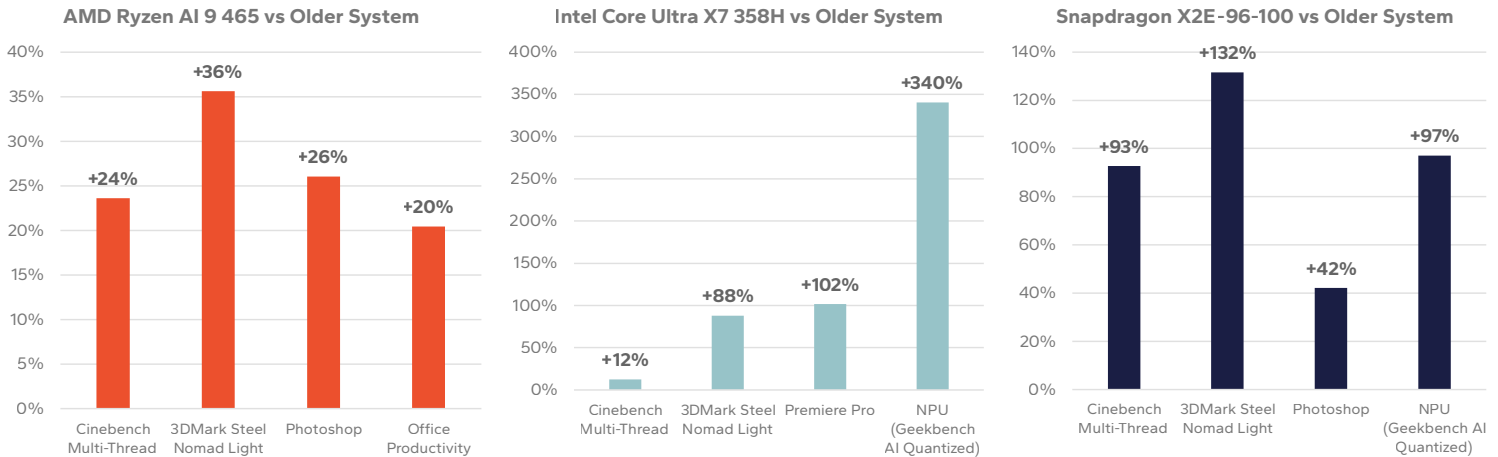
Versus Five-year-old Laptop, in Our Testing

- **Cinebench 2026 multi-thread:** 7.19x
- **Geekbench 6 multi-thread:** 3.79x
- **3DMark Steel Nomad Light:** 4.47x
- **Puget Bench Photoshop:** 2.53x
- **Puget Bench Lightroom Classic:** 3.03x
- **Procyon Office Productivity overall:** +49%

The Snapdragon X2 represents a large gen-over-gen step for the 2026 platforms. The 7.19x advantage over the 5-year-old laptop is the strongest empirical case for the argument that a five-year-old laptop is leaving real performance on the table. The NPU throughput leadership at 85,000+ on Geekbench AI quantized gives the Snapdragon X2 platform a massive amount of AI headroom for Windows 11 Copilot+ features as those features expand.

Each Platform Tells a Different Upgrade Story

Beyond the comparison to a five-year-old reference system, each 2026 platform delivers a meaningful step forward. The strongest gains are concentrated where users feel them most, in graphics, content creation, and on-device AI.



Source: Signal65 lab testing. Higher is better. NPU figures from Geekbench AI quantized inference.

A Five-year-old PC is Genuinely Showing its Age

For the buyer most likely to refresh in 2026, and still running a 2020 or 2021 laptop, the upgrade is not incremental. Every 2026 platform we tested delivers between 3.7x and 7.2x the multi-thread CPU performance of the Tiger Lake reference. Every 2026 platform delivers between 2.3x and 4.9x the integrated graphics performance. Every 2026 platform delivers content creation throughput that is between 2x and 3.3x faster on the same applications.

These are not benchmark deltas that get lost between the lab and the consumer, but instead are the difference between a laptop that struggles with a video call and a Photoshop edit, and one that runs that video call, the Photoshop edit, and a local AI assistant simultaneously without breaking stride.

The performance gap between a 2026 PC and a five-year-old laptop is not incremental. It is transformational across every dimension users feel.

AI Experiences That Make 2026 PCs Worth Owning

The 2026 platform generation is the first cohort where the marketing promise of an AI PC maps cleanly to features consumers can use today. Every platform tested in this study clears the 40 TOPS threshold, minimum system memory, and minimum storage capacity required for Microsoft Copilot+ PC certification, but the more interesting trend is that certification is becoming a floor, not the ceiling. The systems we tested deliver between 2x and 4x the NPU throughput of their older generation options, and they pair that NPU capacity with substantially more general-purpose CPU and GPU compute available for AI workloads.

This matters because the Windows 11 AI experience is no longer a single-engine story. Microsoft positioning has evolved to a more balanced view of where AI compute happens. Many features run locally on the NPU and some run locally on the GPU or CPU. Others execute in the cloud, depending on the workload, the privacy profile, and the latency requirement. A 2026 PC based on these tested platforms is not just better at AI inference, it is better at almost every kind of on-device AI work the user might encounter, and it pairs cleanly with the cloud where that makes more sense.

Several of these features are already shipping on Copilot+ PCs and run on the NPU. Click to Do is an on-screen AI overlay that summarizes documents, extracts text from images, and translates passages in place. Live Captions with translation handles real-time, on-device captioning and translation of any system audio across applications. Cocreator in Paint and Photos provides on-device image generation and editing, with no cloud or subscription required. Windows Studio Effects applies OS-level camera and microphone enhancements available to any video call or recording app. Each runs on the NPU rather than the CPU or GPU, which is what allows them to operate continuously on one of these tested 2026 platforms.

The NPU is a purpose-built block for sustained, low-power inference. Offloading these workloads to the NPU keeps the CPU and GPU free for the user's foreground tasks. Our NPU benchmark deltas of 2x to 4x compared to older laptops leave meaningful headroom as more features adopt on-device AI.

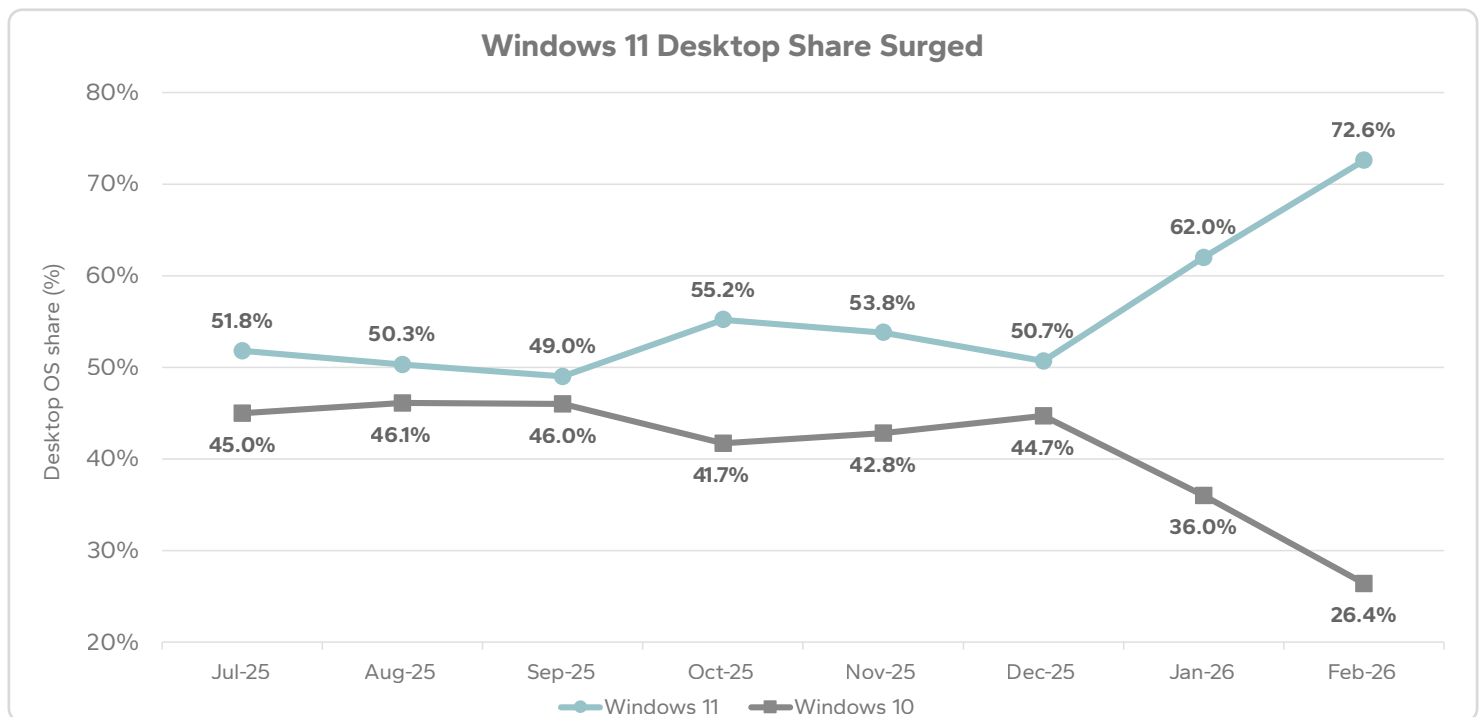
These 2026 platforms also deliver more CPU and GPU horsepower for AI workloads that do not target the NPU, including local language models for coding assistance, document analysis, and content creation.

The Windows 11 Refresh

Windows 10 reached end of support on October 14, 2025, meaning Microsoft no longer provides regular security and feature updates, or technical support. To help keep Windows 10 devices protected during the transition, monthly critical and important security updates are available through the **Windows 10 Extended Security Updates** (ESU) program. Enrollment options vary by region and include Windows Backup, Microsoft Rewards and a one-time payment option.

On its FY26 Q1 earnings call in October 2025, Microsoft reported that Windows OEM revenue grew 18% year-over-year, driven by strong demand ahead of Windows 10 end of support, and significantly ahead of internal expectations. On its FY26 Q2 earnings call in January 2026, Microsoft CEO Satya Nadella confirmed that Windows 11 had reached one billion monthly active users, up more than 45% year-over-year, and a milestone the operating system reached faster than Windows 10 had at the comparable point in its lifecycle.

The momentum is visible in third-party data as well. According to **StatCounter Global Stats**, Windows 11 desktop share rose from approximately 51% in December 2025 to 62% in January 2026 to nearly 73% by February 2026, a roughly 22-point swing in two months. The same dataset shows Windows 10 share falling from approximately 45% to 26% over the same window.



Source: StatCounter Global Stats, desktop Windows version share, worldwide

Beyond Microsoft's own data, the broader 2026 refresh opportunity is anchored to a simple piece of arithmetic. The PC industry shipped approximately 340 million units worldwide in 2021 (339.8 million per Gartner, 348.8 million per IDC), the largest annual volume in nearly a decade, driven by the pandemic-era surge in remote work and learning. With the typical PC refresh cycle running approximately five years, that cohort is now entering its replacement window.

That cohort is the floor, not the ceiling. PCs from adjacent years are also entering refresh. Windows 10 holdouts on unsupported systems face a hardware-driven decision to upgrade, particularly those unable to run Windows 11. And the aging Windows 11 install base itself, including a substantial cohort of three- and four-year-old work-from-home purchases, is increasingly motivated by performance, battery life, and the AI experiences the 2026 platforms answer directly.

The 2026 refresh cycle is broader than any single migration. A cohort that grew up together in 2021 is now aging out together in 2026, layered with a Windows 10 transition wave and a performance-driven upgrade trigger.

The Windows 10 transition did not soften demand. It accelerated it.

For partners asking when the refresh wave will soften, the honest answer is that it will not resolve in a single calendar year. Enterprise IT will use Microsoft's Extended Security Updates program as a managed bridge through 2026 and into 2027. SMB and unmanaged consumer devices will refresh as devices fail or as buyers face the cumulative friction of running an unsupported OS. The tailwind extends well beyond the calendar 2026 forecast horizon.

The Bottom Line: Confidence, Not Caution

The 2026 PC market is being underestimated by partners modeling on the wrong demand curve. Yes, the headwinds are real. Component costs are up, list prices have moved, and the macroeconomic environment includes meaningful uncertainty.

The demand response to those headwinds is not what the fear narrative says it is. 92% of consumer buyers remain addressable even at a 30% price increase. 88% of those buyers stay within their preferred platform. The behavioral response to price pressure is spec-down, delay, refurbished migration, and brand loyalty, not market exit.

The 2026 silicon platforms are genuinely better than what they replace. Across AMD, Intel, and Qualcomm, the 2026 generation delivers between 3.7x and 7.2x the CPU performance of a representative five-year-old PC, with comparable improvements in graphics, content creation, and AI. The user experience gap between a 2026 system and a 2020 or 2021 system is large enough that it is felt the moment the lid opens.

The Windows 10 to Windows 11 refresh is likely accelerated by security and IT need, not chosen by mood. Microsoft has confirmed one billion Windows 11 monthly active users. Windows 11 desktop share crossed 70% in early 2026. Industry analyst data from Gartner and IDC places the 2021 PC shipment cohort at approximately 340 million units, all of them now entering the typical five-year refresh window. The strongest growth is still ahead in SMB and outside North America.

How Signal65 Views these Priorities for Partners

For OEMs and channel partners planning the back half of 2026 and into 2027, the implications are specific, in our opinion.

Build a complete product ladder. Buyers spec down rather than exit. The value-flexer segment is approximately half the consumer market and responds directly to transparent good-better-best tier mapping. A partner with a clean lineup from entry to premium captures the buyer who would otherwise have walked at full price. A partner without that defined lineup loses the buyer to a competitor with one.

Lean into promotional windows. 77% of consumers will delay a purchase rather than overpay, and 80% cite sale events as their primary purchase trigger. Black Friday and back-to-school are the dominant conversion windows. Front-load inventory and marketing into these cycles. The deferred demand of 2026 will release at the moment of the right offer.

Lead with the refresh story, not the price story. The single most powerful purchase trigger in the 2026 market is not a discount, it is the realization that the four- to six-year-old PC sitting on the desk is genuinely ready to retire. Marketing, retail merchandising, and channel sales conversations that frame the 2026 refresh as a generational step forward, with 2x to 7x performance gains and AI experiences that did not exist on prior hardware, will convert better than messaging that leads with price. The relevant addressable market is anchored by the approximately 340 million PCs shipped worldwide during the 2021 surge, now entering their typical five-year refresh window, layered with the Windows 10 holdouts and other aging Windows 11 systems approaching the end of their useful life. The buyers who deferred through 2024 and 2025 are not waiting for a deal. They are waiting for a reason to act.

The buyers are there and our testing shows the platforms are clearly ready. 2026 is a year to lean in.

System Configurations

	HP OmniBook 5 14	HP Pavilion Plus 14	Samsung Galaxy Book Pro 15 - Core i7-1165G7
CPU	AMD Ryzen AI 9 465	AMD Ryzen 7 8845HS	Intel Core i7-1165G7
Graphics	AMD Radeon 880M	AMD Radeon 780M	Intel Iris Xe
RAM	32GB LPDDR5X-8533	32 GB LPDDR5-6400	16GB LPDDR4X-4267
Storage	1TB Western Digital SN500S	1TB Samsung MZVL21T0HDLU-00BH1	512GB Samsung MZ9LQ512HBLU-00B
Display	14" 1920x1200	14" 2880x1800	15" 1920x1080
System BIOS	F.02	F.08	P14RFW.070.240416.SP
Operating System	Windows 11 26200.8246	Windows 11 26200.8246	Windows 11 26200.8246
Virtualization Based Security	Enabled	Enabled	Enabled

	ASUS Zenbook A16	Samsung Galaxy Book 4 Edge	Dell XPS 16
CPU	Snapdragon X2E-96-100	Snapdragon X1E-84-100	Intel Core Ultra X7 358H
Graphics	Qualcomm Adreno X2-90 GPU	Qualcomm Adreno X1-85	Intel Arc B390
RAM	48GB LPDDR5X-9523	16GB LPDDR5X-8448	32GB LPDDR5X-9600
Storage	1TB Samsung MZVL81T0HFLB-00BTW	1TB Samsung KLUGGARHHD-BOG1	1TB Samsung PM9C1b
Display	16" 2880x1800	16" 2880x1800	16" 3200x2000
System BIOS	UX3607OA.309	P00AKX.061.250718.WY.1810	1.3.1
Operating System	Windows 11 28000.2113	Windows 11 26200.8246	Windows 11 26200.8246
Virtualization Based Security	Enabled	Enabled	Enabled

MSI Prestige 16	
CPU	Intel Core Ultra 7 155H
Graphics	Intel Arc Graphics
RAM	32GB LPDDR5-6400
Storage	1TB Western Digital SN560
Display	16" 3840x2400
System BIOS	E15A1IMS.10A
Operating System	Windows 11 26200.8246
Virtualization Based Security	Enabled

Applications Used

Cinebench 2026.1.0

Adobe Lightroom Classic 15.2

Geekbench 6.7.0

PugetBench Photoshop 1.0.06

3DMark 2.32.8853

PugetBench Lightroom Classic 1.0.0

Geekbench AI 1.7.0

UL Procyon 2.12.2562

Adobe Photoshop 27.5

Microsoft Office 2604

All performance testing conducted by Signal65 under controlled lab conditions, on AC power in default balanced power profile, using publicly available, industry-standard benchmarks. Multiple runs per benchmark, with reported figures reflecting the average of valid runs.

Consumer demand findings sourced from Futurum Group's March 2026 PC Market Confidence Brief, an independent qualitative study of 462 active PC buyers across North America (151), Europe (152), and APAC (159), commissioned by Microsoft. The full Futurum executive summary is available separately.

Windows 11 adoption data drawn from Microsoft FY26 Q1 (October 2025) and Q2 (January 2026) earnings call commentary, Microsoft Windows Experience Blog, and StatCounter Global Stats. Industry and refresh commentary drawn from public earnings calls, Microsoft public statements, and analyst reporting from Gartner and IDC, for fiscal periods covering Q3 calendar 2025 through Q1 calendar 2026.

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