

CDW's Windows Vista™ Tracking Poll

*Wave 2: Users Confronting,
Overcoming Adoption Issues*

May 8, 2007



Research Overview



- Data collection took place between 2/20–2/27
- Research conducted by Walker Information
- Survey “respondents” refers to 753 IT decision makers who identified themselves as being familiar with Microsoft Windows Vista
- The Margin of Error for the full sample size of 753 is ± 3.5 percent at a 95 percent level of confidence
- Participants were members of an online survey panel of IT decision makers within the following segments:
 - Small Business (Fewer than 100 employees) (± 8 percent Margin of Error)
 - Medium/Large Business (100+ employees) (± 8 percent Margin of Error)
 - State & Local Government (± 8 percent Margin of Error)
 - K-12 Education (± 8 percent Margin of Error)
 - Higher Education (± 8 percent Margin of Error)
- Differences between these segments have been statistically tested at the 95 percent level of confidence
- This report is the second of three that CDW will execute over the coming months to assess IT decision makers’ attitudes toward adoption of Microsoft® Windows Vista™
- CDW issued the first report in November 2006, and differences between Waves 1 and 2 have been statistically tested at the 95 percent level of confidence

Key Findings – April 2007

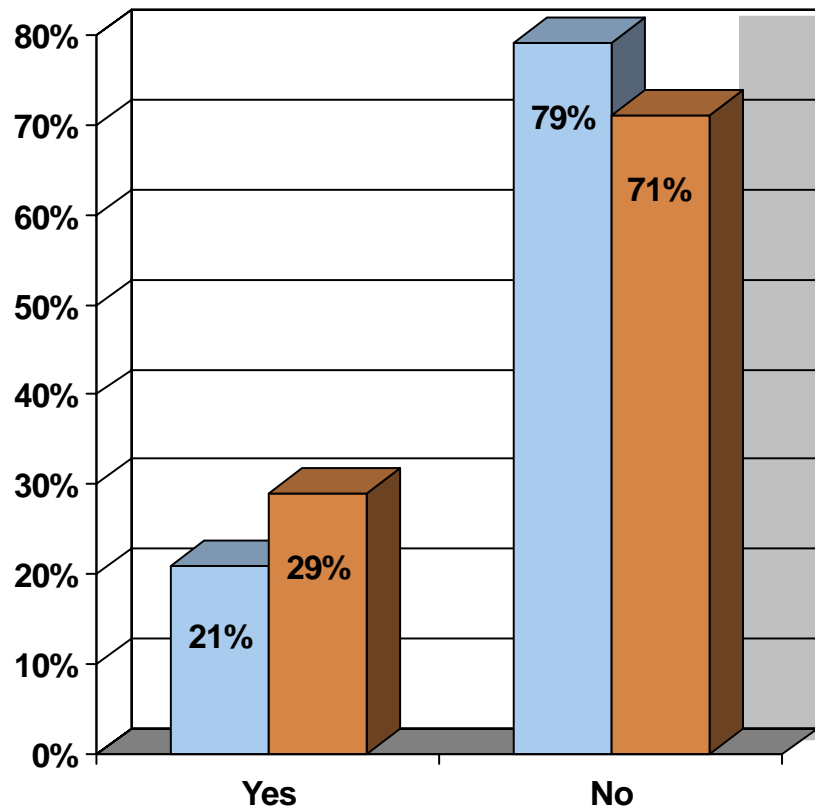


- Twenty-nine percent of respondents indicate that their organization is evaluating, testing or implementing Vista
- The number of organizations evaluating and testing has increased **8 percent** since October 2006, and 70 percent of those testing will have completed implementation within 12 months
- Eighty-seven percent of organizations have implemented or plan to implement Microsoft Vista; 19 percent are currently implementing
- Positive perception of key performance and patch management benefits declined between Waves 1 and 2
- Twenty-six percent of respondents report strong positive and positive feedback compared to just 13 percent reporting some negative or negative feedback. Of those reporting user feedback, 82 percent was neutral to positive

Wave 1 vs. Wave 2 Tracking



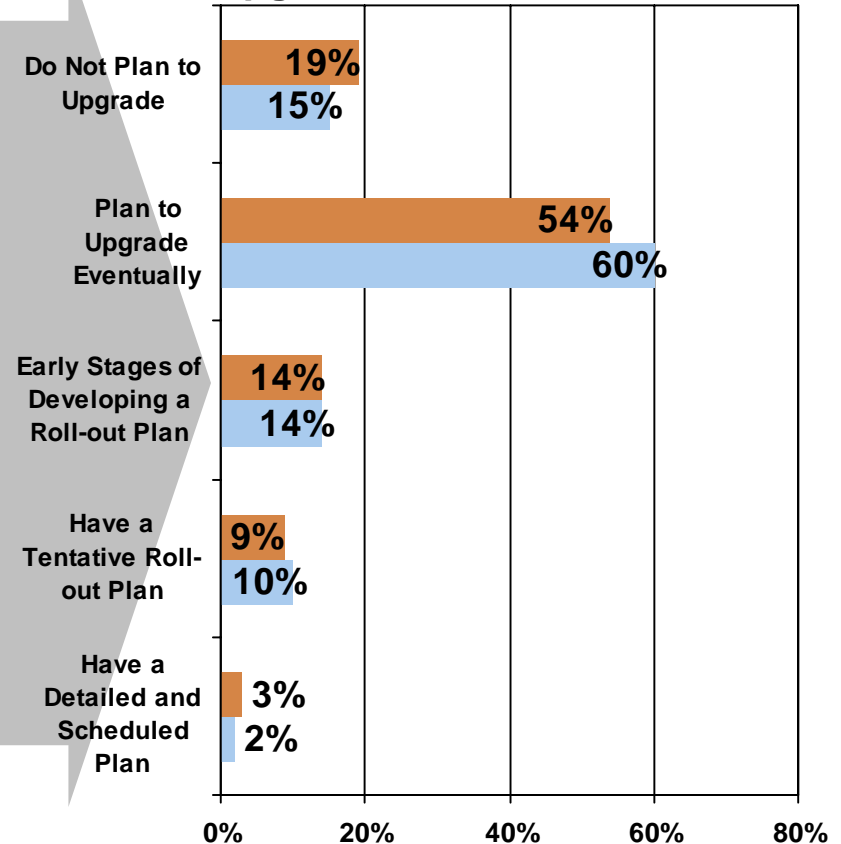
Are you currently using or evaluating Windows Vista?



Wave 1
Base = 733

Wave 2
Base = 747

Of those not currently using or evaluating, please rate the state of your current plan to upgrade to Windows Vista:



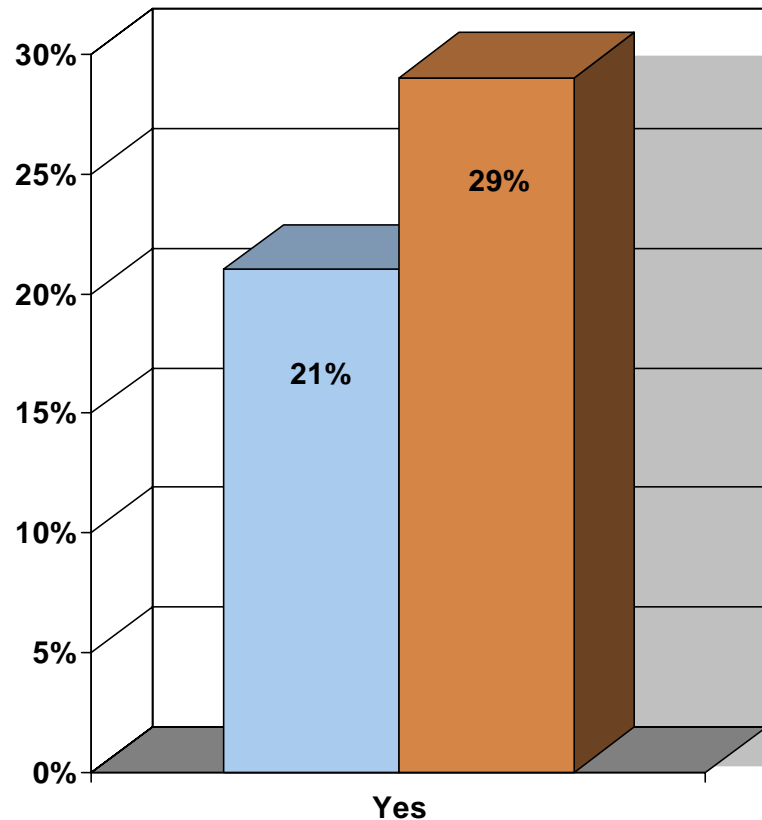
Wave 1
Base = 526

Wave 2
Base = 485

Evaluation Precedes Adoption



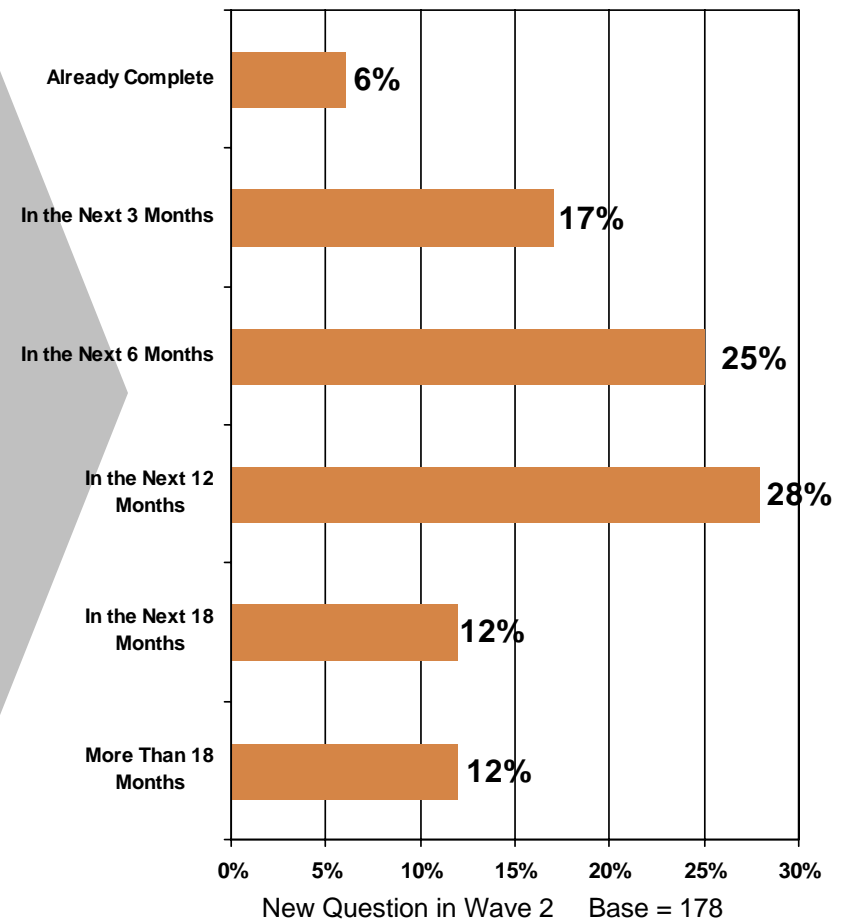
Are you currently using or evaluating Windows Vista?



Wave 1
Base = 761

Wave 2
Base = 753

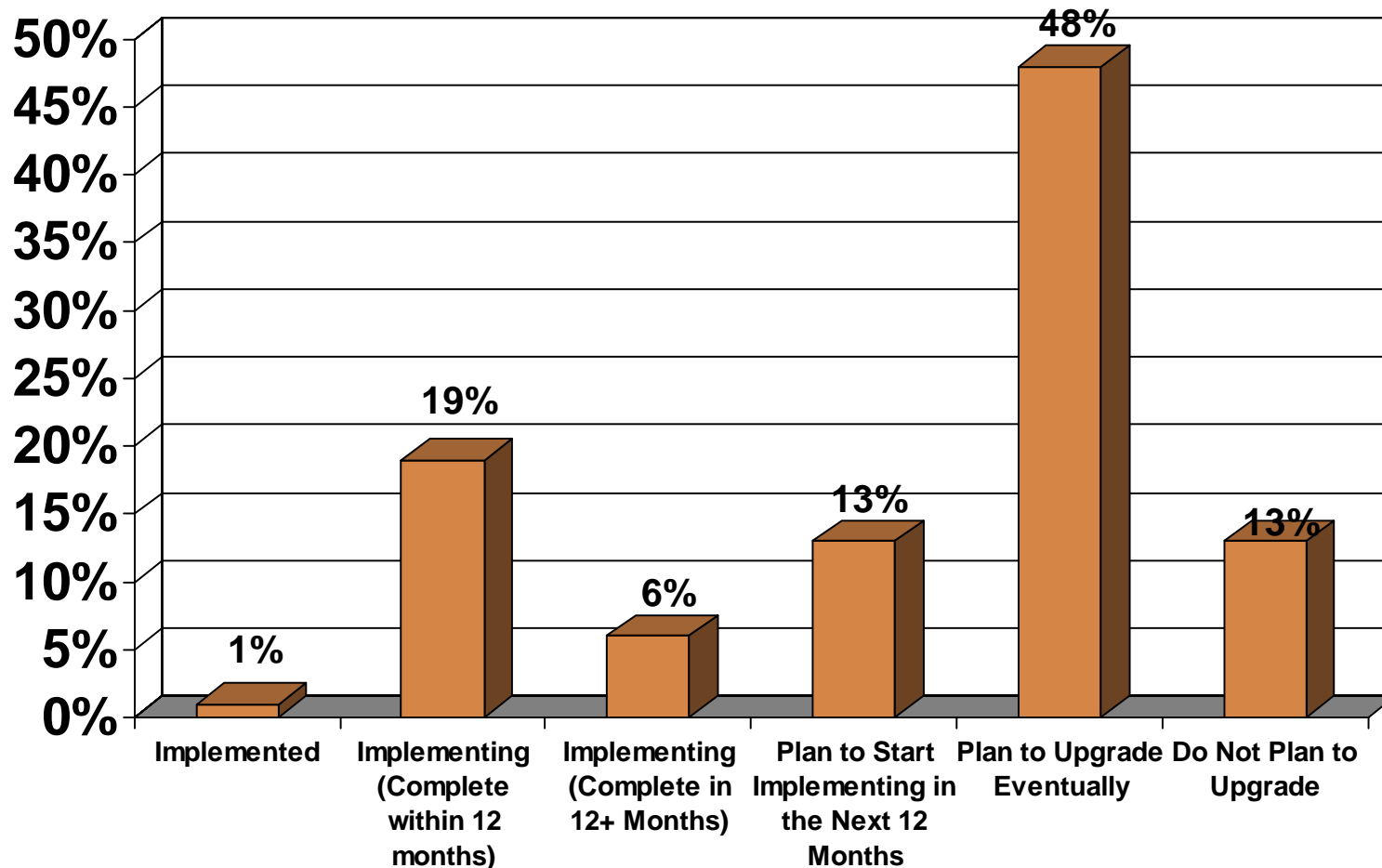
Of those using or evaluating, when do you expect your organization to complete its migration to Windows Vista?



Organizations Are Implementing Vista



The current state of Microsoft Windows Vista adoption (Combination of Organizations Currently Evaluating and Not Currently Evaluating)

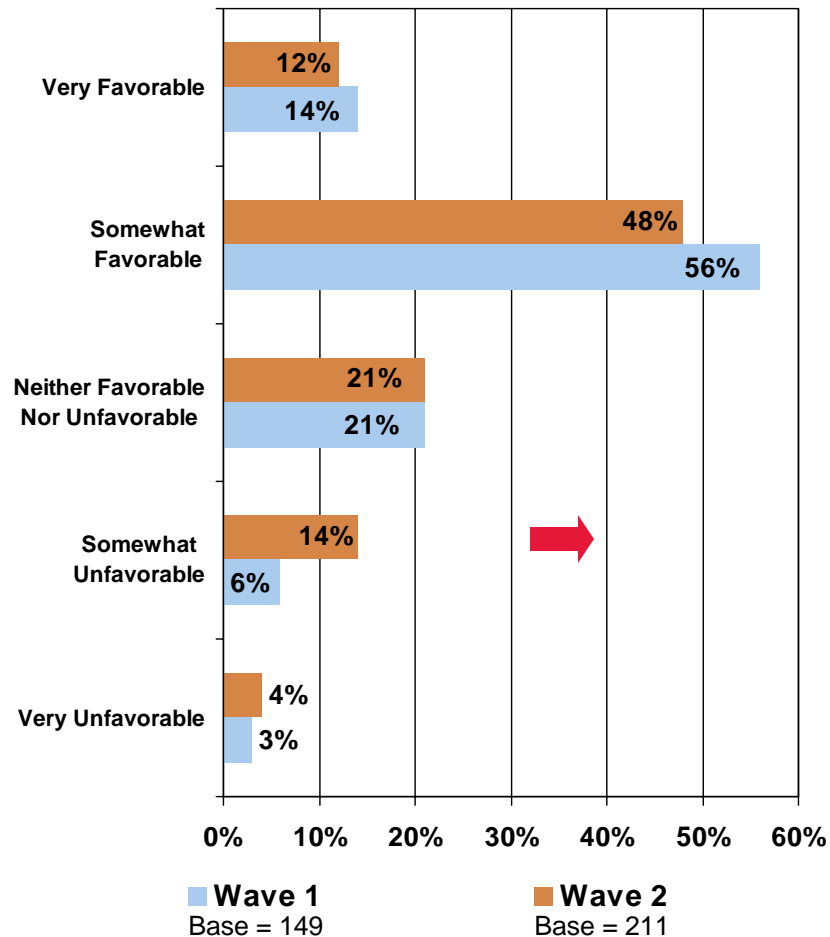


Base = 753

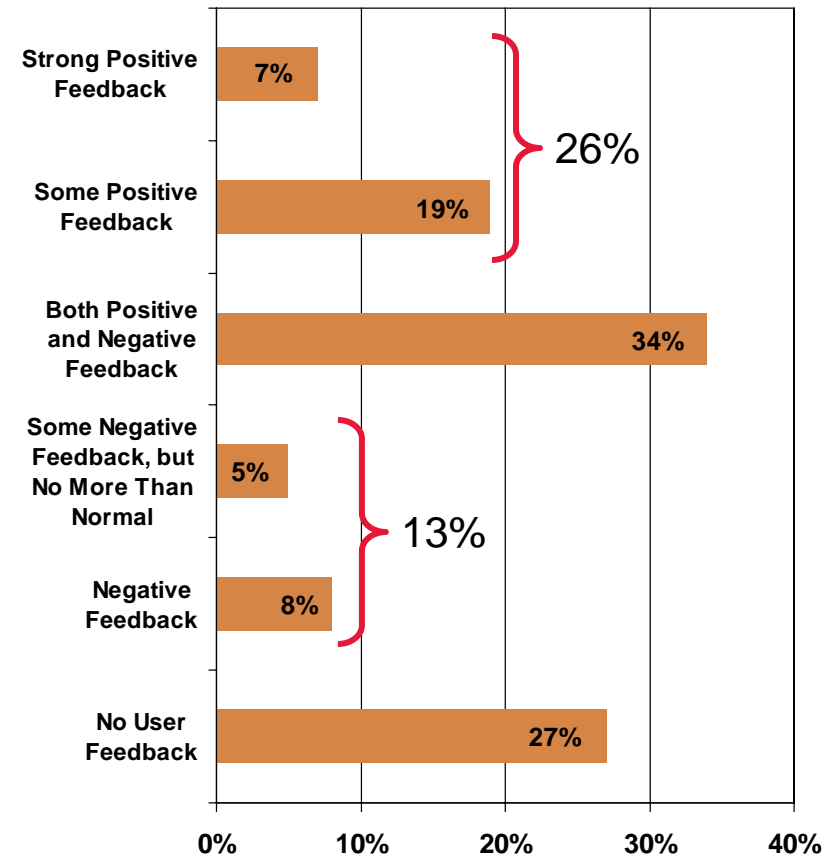
Feedback from Those Implementing



What is your overall impression of Windows Vista based on your experience?



What kind of user feedback have you had regarding Windows Vista?



New Question in Wave 2 Base = 199

↑/↓ Significantly higher/lower than Wave 1.

Overcoming User Experience Issues



Voice of the Customer

“Seems very stable. Very nice and easy to understand interfaces. I like the auto backup features.”

“All testers are impressed with the graphics qualities. Some are frustrated that common administrative tasks are more difficult to perform.”

“It seems more secure and better than XP, but uses too many resources.”

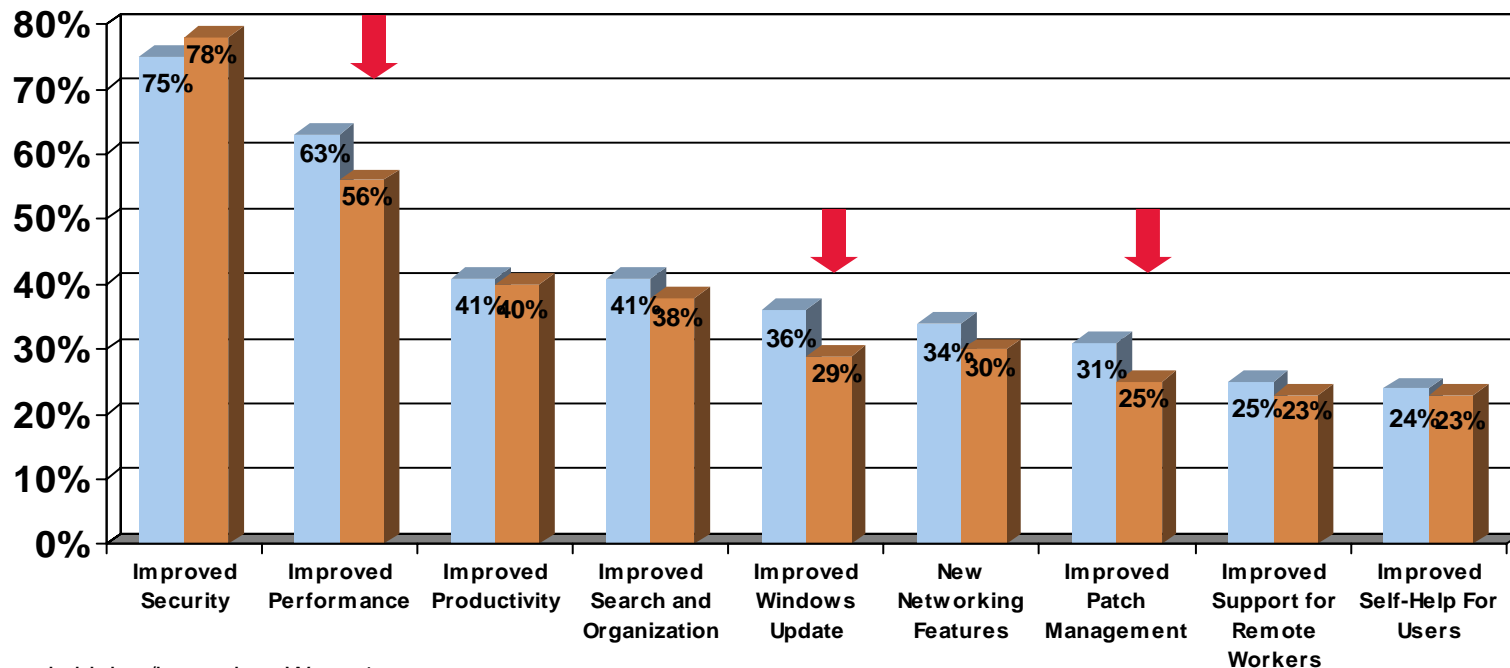
Improving the User Experience

- Proper configuration of Vista features substantially improves the user experience
- Vista adds thousands of new features. Don't try to configure/do everything at once. Pick the features that provide the most value to your business and implement those first
- To reduce administrative requirements, utilize Vista's feature to extend user rights without compromising system security or administrative control

Perceived Features and Benefits



What benefits or features do you think will be most attractive to your organization if it implements Windows Vista?



↑/↓ Significantly higher/lower than Wave 1.

■ Wave 1
Base = 647

■ Wave 2
Base = 601

Security and performance continue to top the list of perceived benefits for implementing Vista.

Overcoming Performance Issues

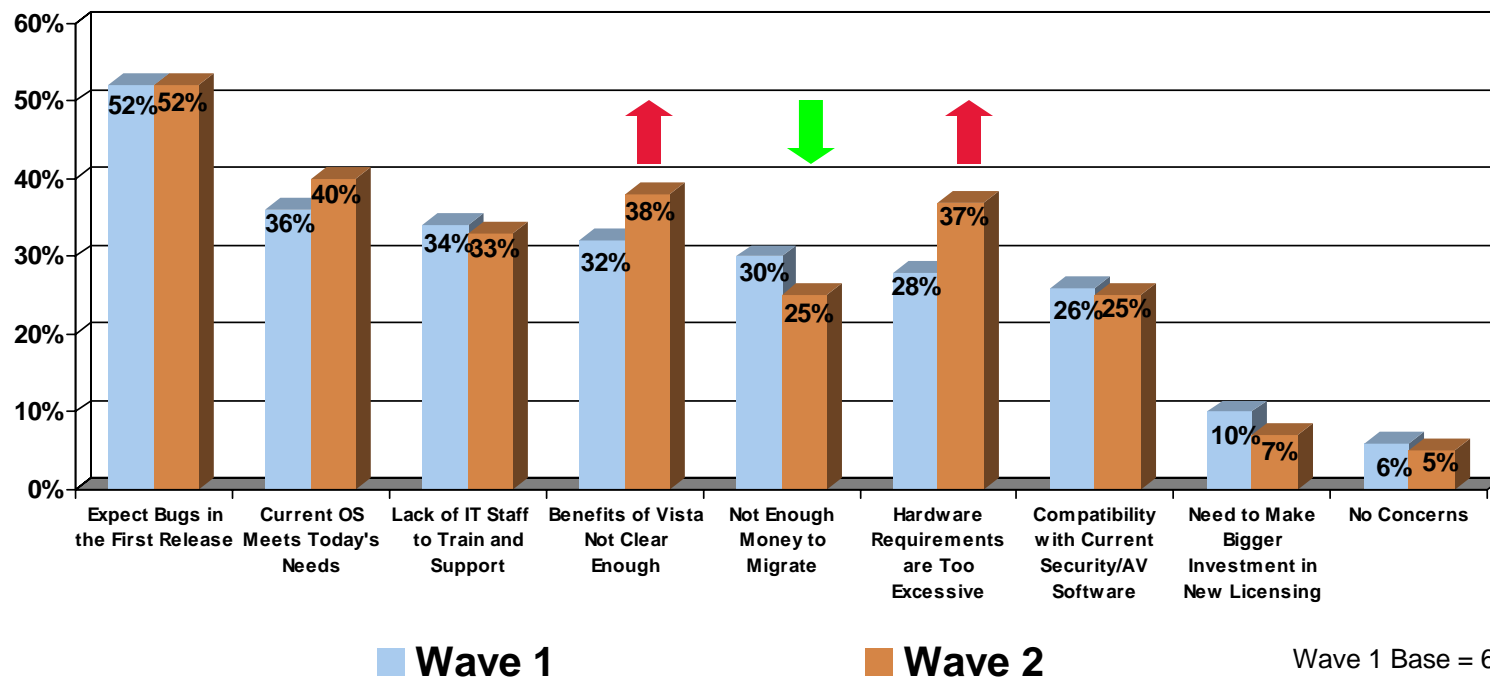


- Optimize the indexing feature by increasing scan depth and frequency, while reducing the scope of each scan to improve search performance and speed
- ReadyBoost enables users to draw upon a USB-connected memory device for additional memory. If configured correctly, this significantly increases performance
- Enable the integrated Windows patching to facilitate increased control over patch cycles
- Utilize offline patching in concert with Windows Server Update Service to manage patching globally rather than locally (i.e., client by client)

Concerns to Consider



What concerns do you have as you consider or implement Windows Vista?



↑/↓ Significantly higher/lower than Wave 1.

Wave 1 Base = 694

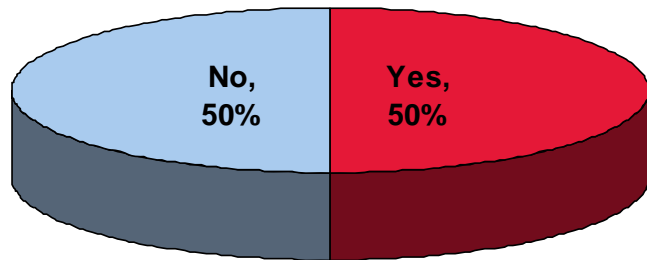
Wave 2 Base = 699

- On the whole, benefits continue to outweigh concerns
- Customers are more concerned with hardware requirements

Vista Hardware Requirements



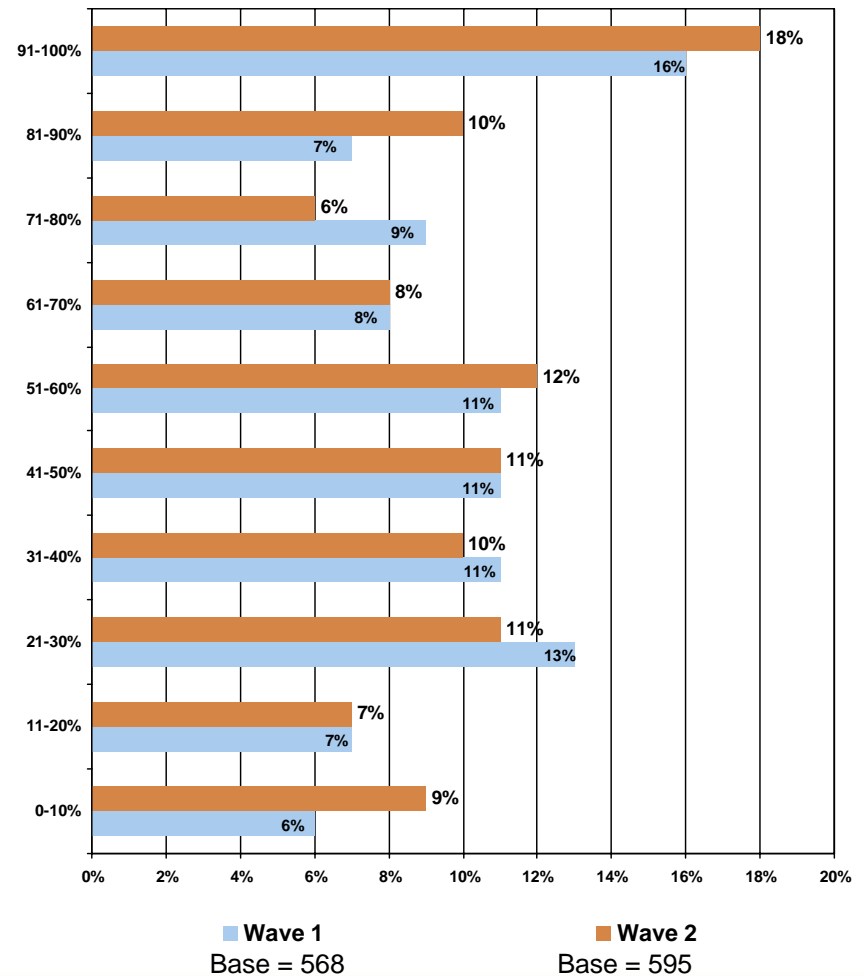
Are you buying other hardware or software assets because of your company's migration to Windows Vista?



Base = 169

Fifty percent of those currently testing or implementing are buying hardware based upon the migration, but infrastructure requirements are not out of line with initial expectations.

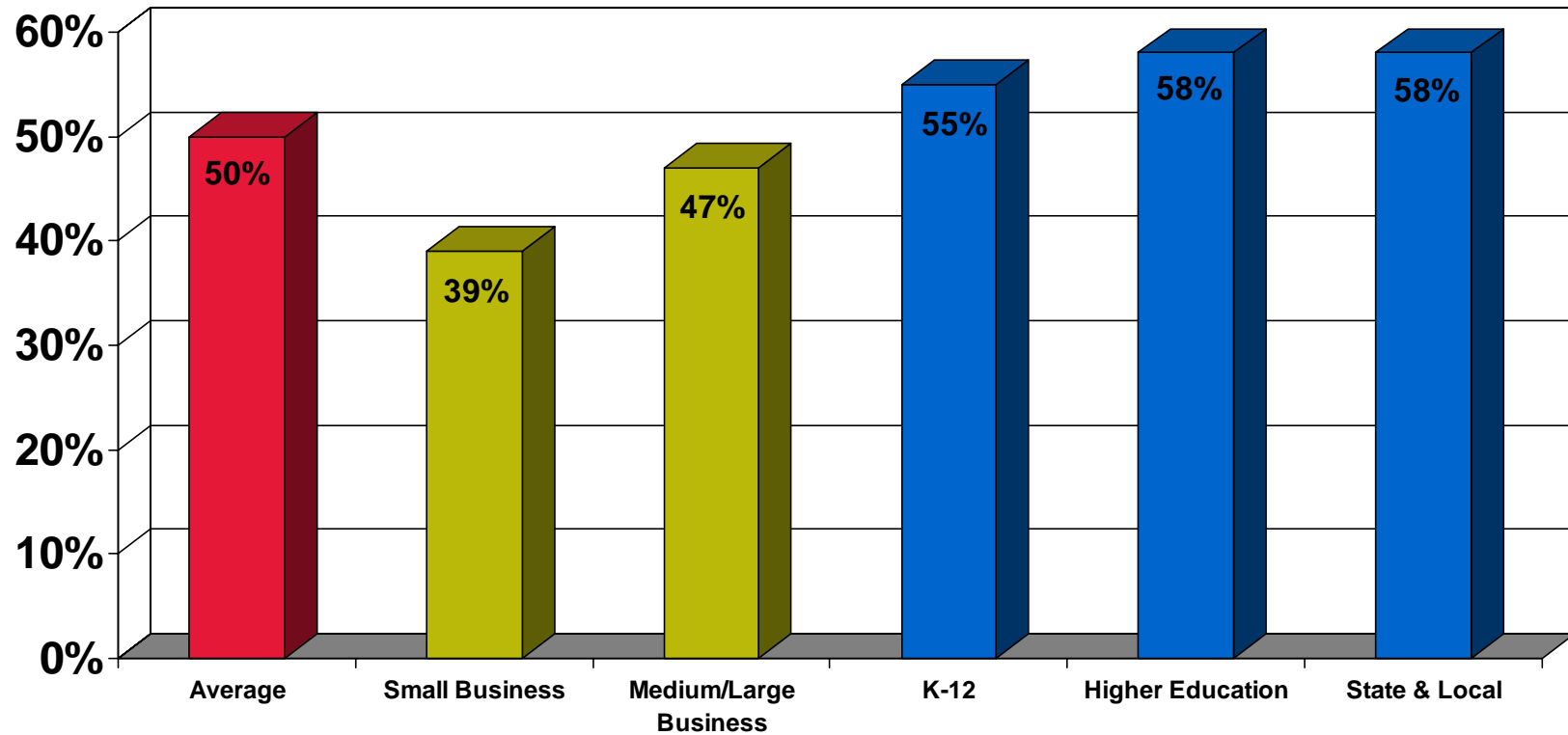
What percentage of your Windows-based hardware will (or would) require upgrading or replacement to become Windows Vista compatible?



Segment Hardware Requirements



Are you buying other hardware or software assets because of your organization's migration to Windows Vista?



We would expect hardware and software infrastructure requirements to be higher for the public sector given slower technology adoption and longer refresh cycles.

Managing Hardware Requirements

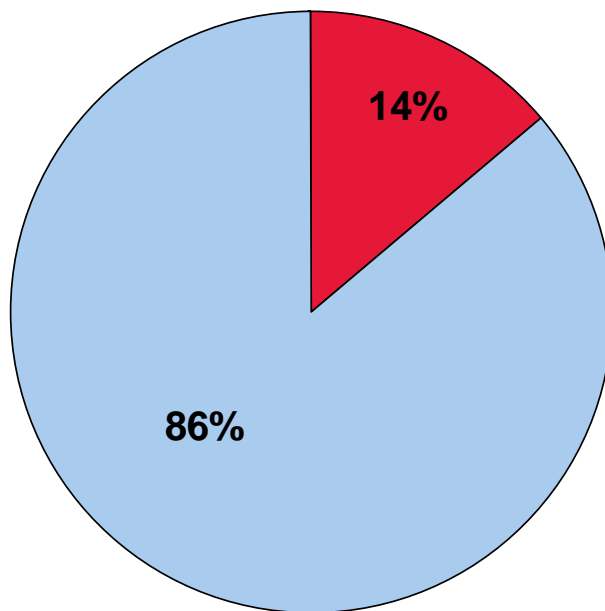


- Enable/Disable Vista features based upon hardware performance scores to facilitate a phased approach to deployment
- ReadyBoost will increase memory by using USB devices as an additional RAM resource
- RAM first. Vista performance can be increased by focusing on RAM upgrades before adding other components
- Configuration is key. Utilize the broad configuration options to capture the core benefits that Vista provides without significant hardware purchases or upgrades

Delayed IT Acquisition Due to Vista?



Are you postponing any IT purchases or decisions because you plan to implement Windows Vista?



■ Yes

■ No

Base = 639

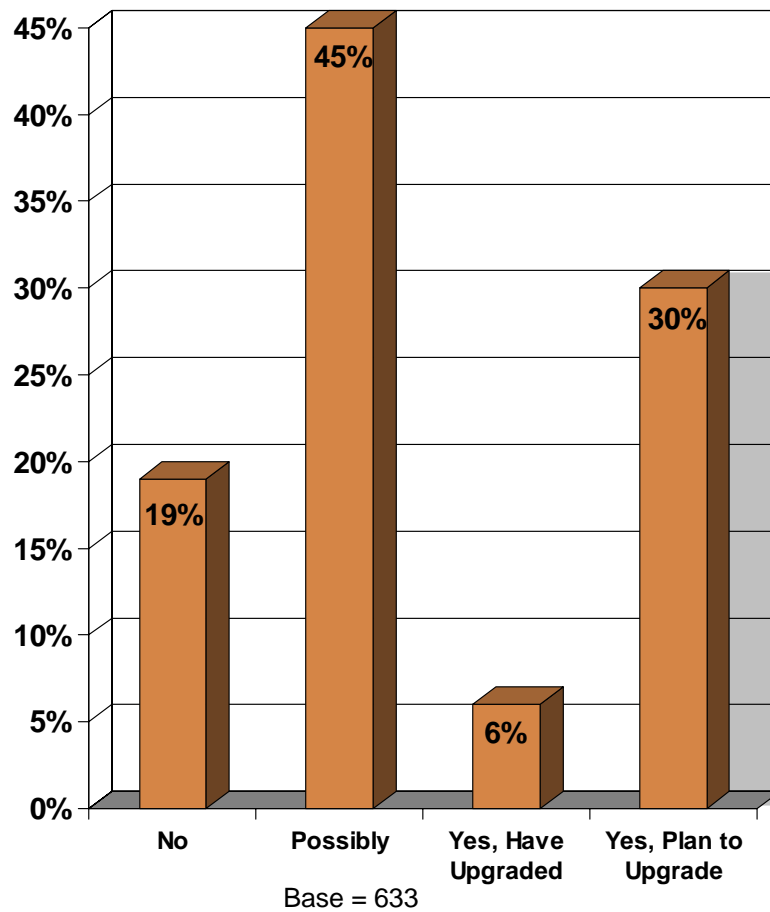
No change between Waves 1 and 2 – Hardware purchase and refresh maintain the same cycles. For Wave 2:

- Fifty-one percent of those delaying indicate that less than 30 percent of spending is delayed (47 percent in Wave 1)
- Just 22 percent indicate that more than half of spending is delayed (24 percent in Wave 1)

Vista and Office 2007

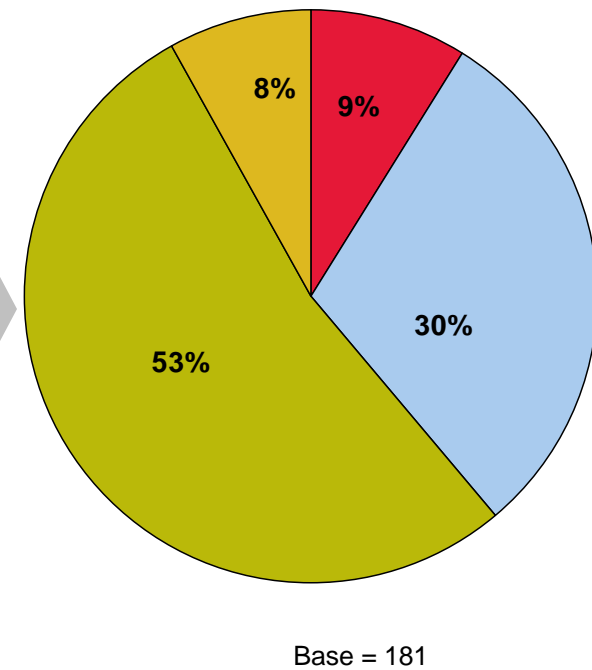


Are you upgrading to Microsoft Office 2007?



What is the time frame for adoption of Office 2007?

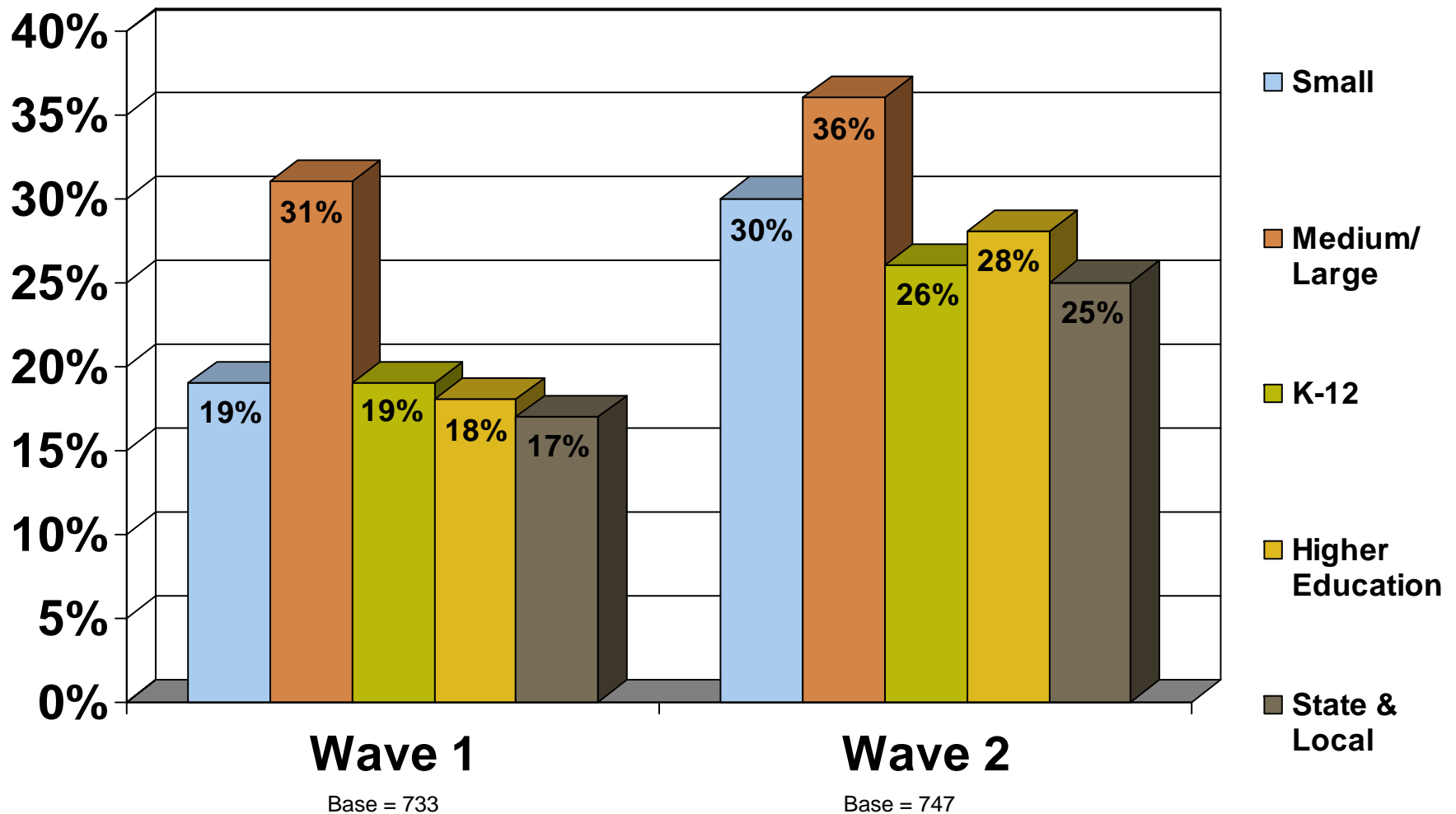
- Within 3 Months
- 3-6 Months
- 6-12 Months
- More Than 12 Months



Evaluation is Up Across All Segments



Are you currently using or evaluating Windows Vista?

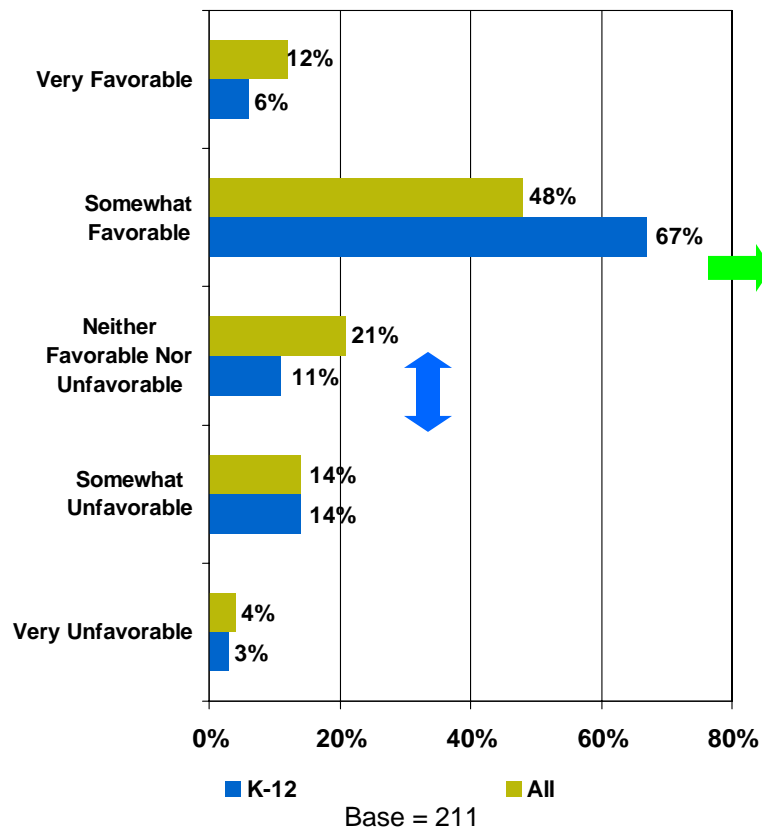


K-12 Education Views



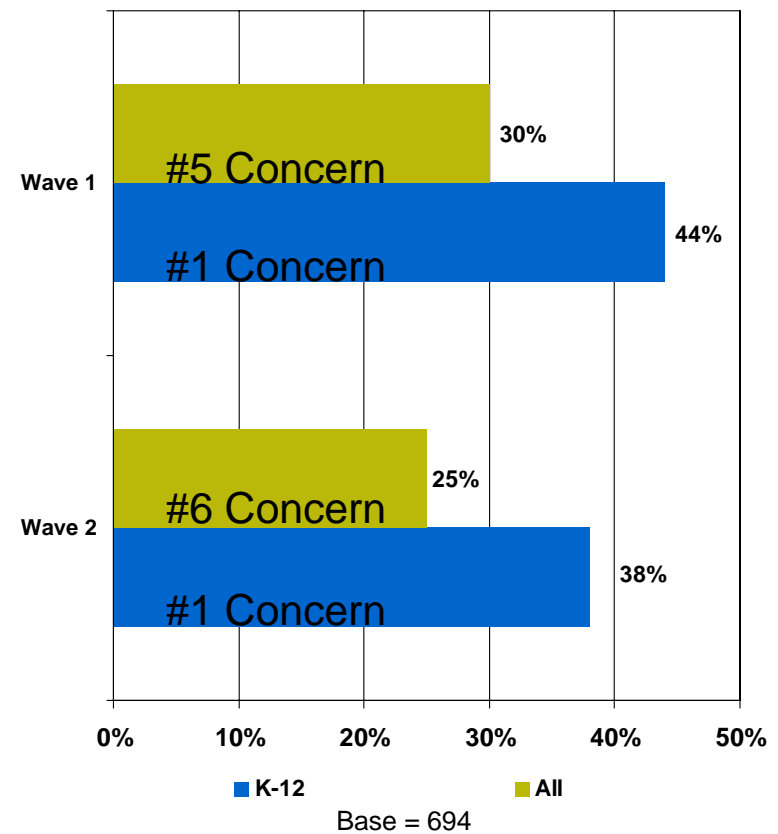
What is your overall impression of Windows Vista based on your experience?

Educators have a more favorable opinion of Vista



What concerns do you have as you consider or implement Windows Vista?

Money is still the main obstacle, but less so

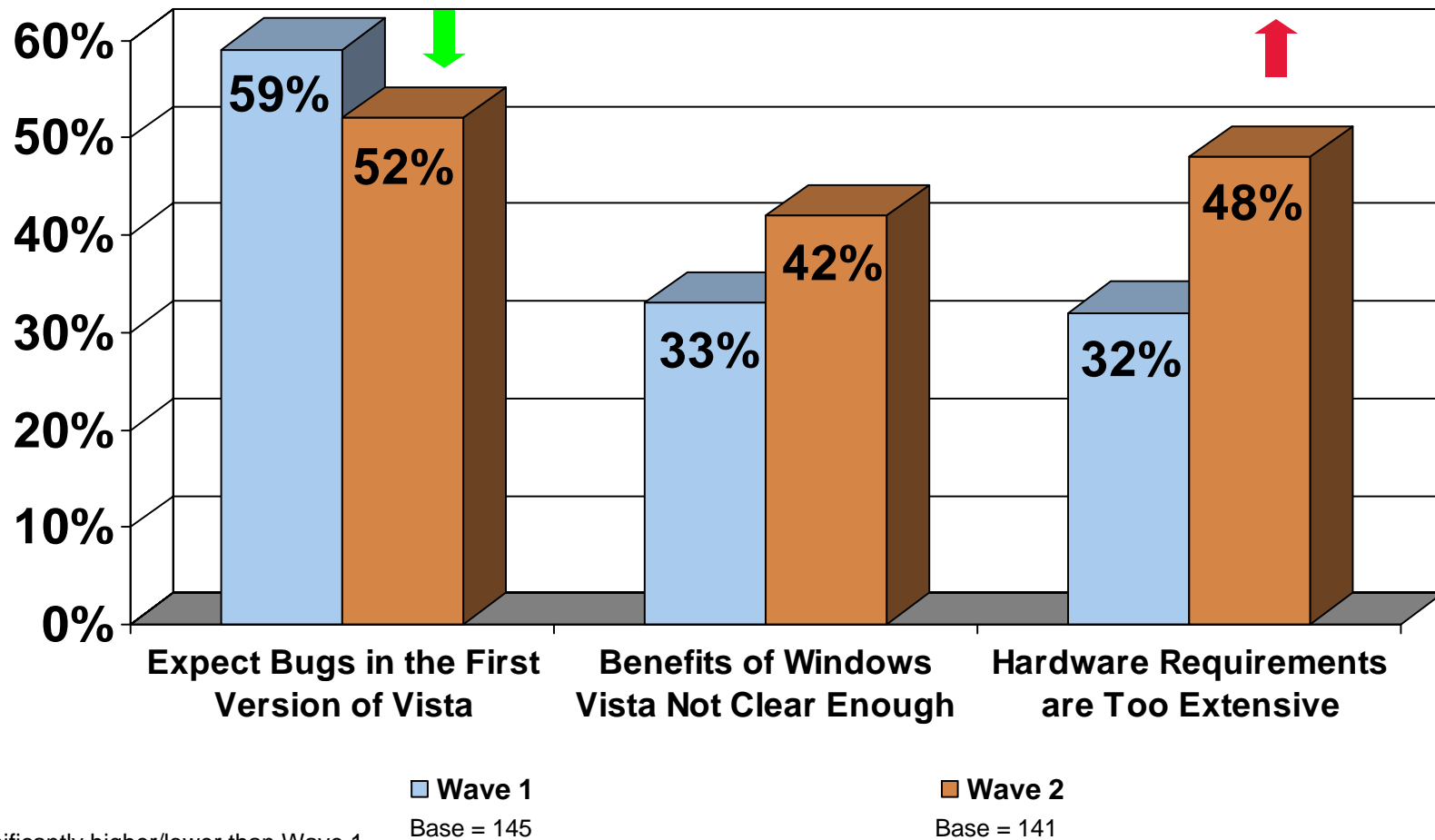


↑/↓ Significantly higher/lower than Wave 1.

Higher Education Views



Hardware Requirements an Increasing Obstacle



↑/↓ Significantly higher/lower than Wave 1.

Key Takeaways



- **Proper configuration of Vista features dramatically improves the user experience**
- **ReadyBoost increases performance by using a USB device as additional memory. If configured correctly, this substantially increases performance**
- **Enable/Disable Vista features based upon hardware performance scores and business requirements to facilitate a phased approach to deployment**

Thank You

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