



Windows Vista Adoption Trends: A Survey of Technology Professionals

■ INTRODUCTION

The release of Windows Vista has generated extensive debate within corporate IT departments about the right timing and approach for migrating to Microsoft's latest operating system. In November 2007, King Research surveyed 961 IT professionals to gather data about the perceived impact of Vista on IT organizations and their operating system adoption strategies. The survey found very high levels of concern about the migration, including the stability of the operating system, its compatibility with business applications, the cost, and more.

When the original survey was published, there was some debate about the concerns cited by the participants. Were these issues that would be expressed with any new technology and would fade with time? Or, were there deeper issues that would continue to impact the adoption of Vista in corporate IT?

The goal of this report is to evaluate changes in attitude towards Windows Vista now that it has been on the market for a longer period of time, and Service Pack 1 (SP1) has been released. This report is based on a survey of 1,162 IT professionals conducted in June 2008. It compares those findings to the November 2007 results.

■ SUMMARY

Most IT professionals continue to be concerned about migrating to Windows Vista. The number of IT departments that do not plan to deploy Vista has increased. Service Pack 1 has not impacted plans for Vista deployment, but Windows 7 has. The greatest concern with Windows Vista is its compatibility with required business software.

Many corporate IT groups have considered deploying non-Windows operating systems to avoid a Vista migration. More are actively in the process of switching to an alternative operating system and more cite challenges with managing non-Windows operating systems than in the original survey. Mac OS continues to be the most likely operating system to be deployed in place of Vista. The majority of participants say a single interface for systems management in heterogeneous environments would be beneficial.

■ KEY FINDINGS

- 60% report that they have no plans to deploy Vista at this time, up from 53% in the 2007 survey
- 92% say Vista Service Pack 1 has not changed their plans for Vista deployment
- 14% report they have delayed their Vista deployments while they wait to hear more about Windows 7, and an additional 14% say they will skip Vista to wait for Windows 7
- 83% of participants say they are concerned about the compatibility of required business software with Vista
- 42% have considered deploying non-Windows operating systems to avoid a Vista migration compared to 44% in the 2007 survey
- 11% are already in the process of switching operating systems, up from 9% in the 2007 survey, and a further 30% expect to switch within the next year, up from 25% in 2007
- Mac OS is the most likely operating system to be deployed in place of Vista (29%)



Windows Vista Adoption Trends: A Survey of Technology Professionals

- 65% say it is challenging to obtain the expertise needed to manage multiple operating systems, up from 49% in 2007
- 41% report it is challenging to secure multiple operating systems, up from 25% in 2007
- 41% report systems management challenges prevent adoption of non-Windows operating systems, down from 45% in the 2007 survey
- 87% say a single systems management interface for all types of operating systems would be beneficial, down from 89% in the 2007 survey

■ DETAILS

■ IT professionals continue to be concerned about Windows Vista

In the 2007 survey, the vast majority of participants, 90%, said that they had concerns about the migration to Windows Vista. In 2008 that number dropped to 82%, but it continues to be very high.

This slight decrease in the number of those concerned is not reflected in the actual adoption of Vista by corporate IT which is consistent with the 2007 survey. In 2007, 48% of participants reported that they had not yet deployed Vista in any way, which remained stable in 2008 at 47%. The number of companies that are fully deployed on Vista is up very slightly from 1% to 2% – with the majority of those working for very small companies.

■ Slightly fewer IT organizations plan to adopt Vista

In the 2007 survey, King Research found that 53% of participants reported they had no plans to deploy Vista and that 13% believed they would eventually be fully deployed on Vista across their companies. The 2008 survey actually showed that even fewer IT departments plan to migrate to Vista with 60% saying they had no plans to deploy Vista and only 9% saying they would eventually be fully deployed on Vista across their companies. See Figure A for a detailed breakdown on how responses changed between the two surveys.

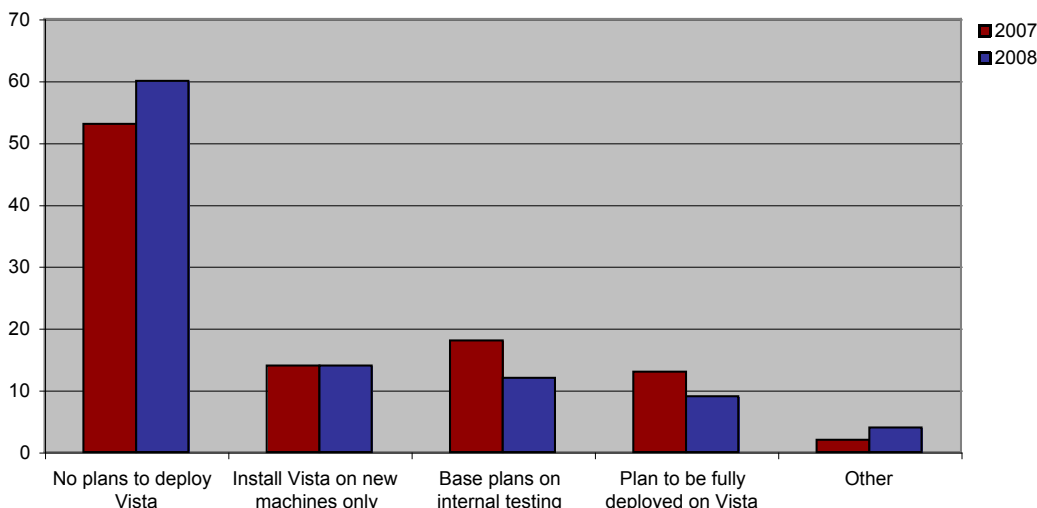


Figure A: Current Plan for Deploying Vista



Windows Vista Adoption Trends: A Survey of Technology Professionals

Release of Service Pack 1 has not altered Vista adoption plans

Participants were asked if the release of Service Pack 1 (SP1) had changed their plans to deploy Vista. Participants overwhelmingly stated (92%) that it had no impact. Only 2% of participants responded that SP1 had accelerated their Vista adoption plans and 3% reported that SP1 had actually delayed their plans for Vista adoption. A further 3% had still not determined the impact of SP1. See **Figure B**.

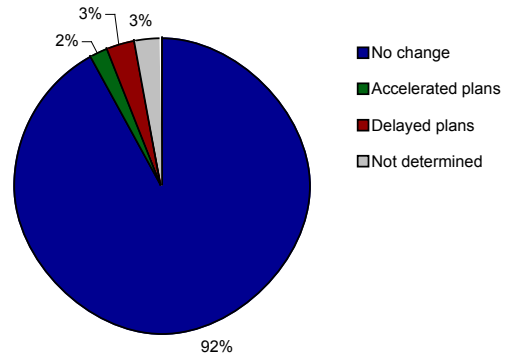


Figure B: Impact of SP1 on Vista Adoption Plans

Windows 7 has caused some participants to delay or skip Vista deployment

The 2008 survey added an additional question to evaluate the impact of Windows 7. The majority, 51%, said that Windows 7 would not impact their plans, and a further 17% were not aware of Windows 7. However, 28% did report that Windows 7 had impacted their plans for Vista deployment including those who had decided they would skip Vista and wait for Windows 7 (14%) and those who had delayed their Vista plans while they waited to hear more about Windows 7 (14%). See **Figure C** for the detailed breakdown.

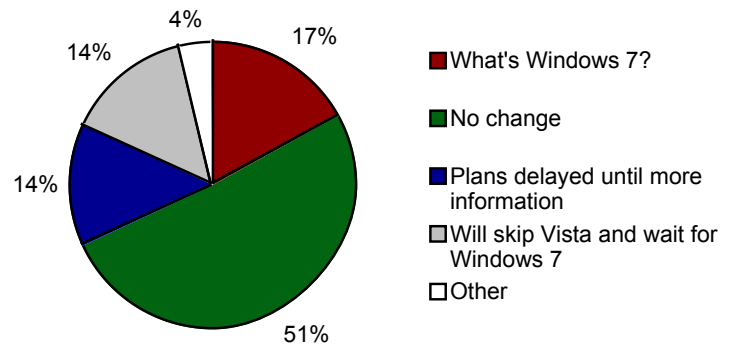


Figure C: Impact of Windows 7 on Plans to Deploy Windows Vista

Compatibility of Vista with business software greatest concern

In 2007, we gathered open-ended comments from users to understand their concerns about migrating to the Vista operating system. Based on the comments we received, it was clear that the biggest concerns around Vista were the stability of the operating system and its compatibility with business applications. Cost was also cited as a factor by several participants.

For the 2008 survey we added a specific multiple choice question about the reason for concern to enable us to put hard data on these concerns. Compatibility of required business software with Vista was the most frequently cited concern with 83% of participants indicating this as an issue. See **Figure D** for more details.

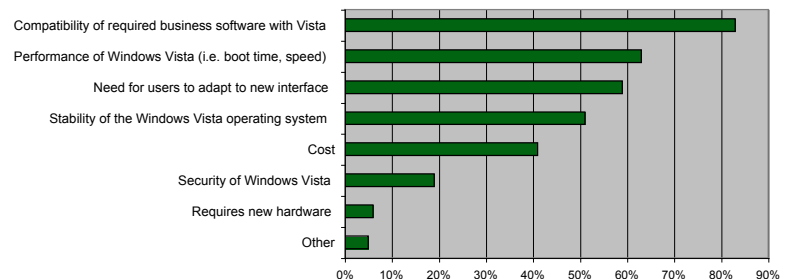


Figure D: Concerns with Windows Vista



Windows Vista Adoption Trends: A Survey of Technology Professionals

■ Many companies still considering deploying non-Windows operating systems

In both surveys, participants were asked if they had considered the possibility of deploying any non-Windows operating system as an alternative to adopting Windows Vista. In 2007, 44% of participants said that they had considered this alternative and in 2008, 42% said they had.

Clearly, many companies continue to be serious about this alternative with 11% of those saying they have considered non-Windows operating systems already in the process of switching (up from 9% in 2007) and a further 30% expecting to switch within the next year (up from 25% in 2007). See **Figure E**. In 2007 15% of participants said there was no possibility of switching, which went down to 8% in 2008.

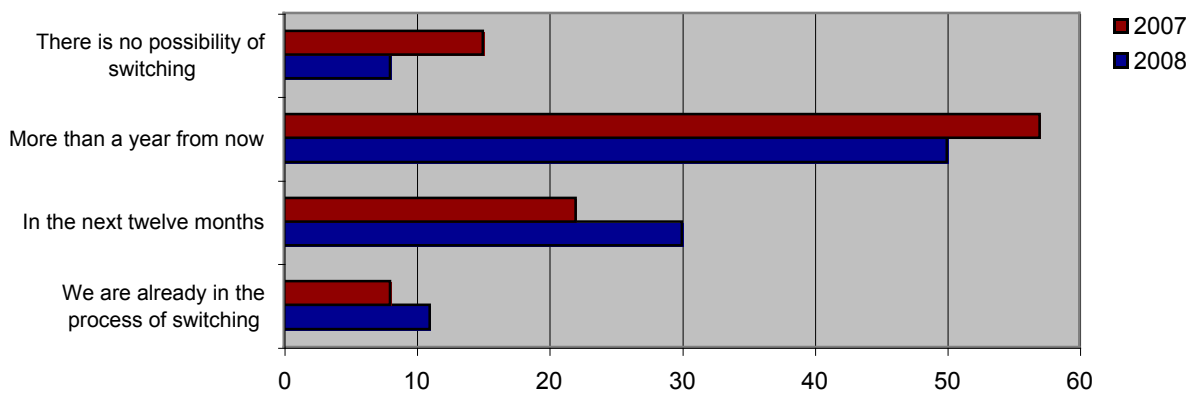


Figure E: Timeframe for Switching Operating Systems

■ Macintosh continues to be the most likely operating system to be deployed in place of Vista

The alternate operating systems varied little between the two surveys, with Macintosh continuing to be the most likely operating system to be deployed in place of Vista at 29% (compared to 28% in 2007). See **Figure F**.

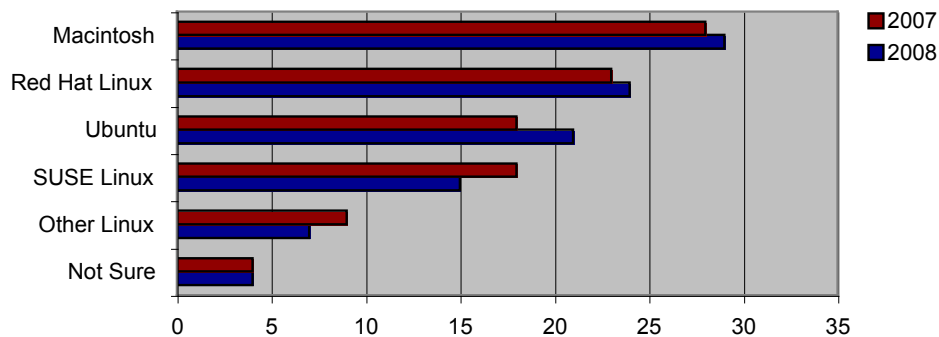


Figure F: Most likely Operating System to Deploy in Place of Vista



Windows Vista Adoption Trends: A Survey of Technology Professionals

■ Systems management challenges continue to create barrier to adoption of non-Windows operating systems

As reported in the 2007 survey findings, although participants reported interest in switching to alternative operating systems, there were many challenges reported by participants. The two challenges reported most frequently by the IT professionals in that survey were:

- 1) User familiarity with Windows
- 2) Difficulty managing non-Windows operating systems

This did not change for the 2008 survey.

■ More IT professionals report challenges with managing non-Windows operating systems.

The number of participants reporting specific challenges with managing non-Windows operating systems increased significantly in 2008. 65% cited the challenge of obtaining the expertise needed to manage multiple operating systems (compared to 49% in 2007), and 41% mentioned the challenge of securing multiple operating systems (up from 25% in 2007). See **Figure G** for a detailed breakdown. Given the increase in the number of survey participants who are adopting non-Windows operating systems (**Figure E** above), it is possible that these numbers are reflecting more real-world experience managing non-Windows operating systems.

Note that more than half of the survey participants (56% in 2008 and 60% in 2007) manage their Windows systems with tools (backup, patching, etc.) that do not support non-Windows operating systems.

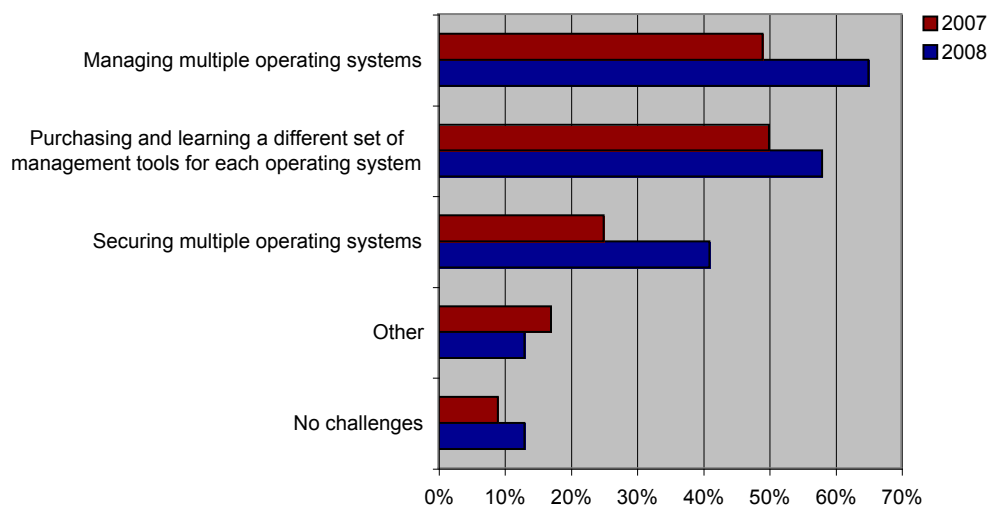


Figure G: Challenges with Managing Non-Windows OSes

Almost half of all participants (41% in 2008 and 45% in 2007) cited challenges with systems management in non-Windows operating systems as preventing them from adopting non-Windows operating systems.



Windows Vista Adoption Trends: A Survey of Technology Professionals

■ Single systems management interface would benefit corporate IT

Participants were asked if it would be beneficial to use a single systems management interface to manage a wide variety of operating systems. The response was very positive with 87% of participants (compared to 89% in 2007) reporting that broad operating system support would be very beneficial to them.

■ SURVEY METHODOLOGY

For each survey, an independent database of IT professionals was emailed and invited to participate in an online survey on trends with corporate operating systems. The source of the database for both surveys was the same, although it had evolved during the time between surveys.

For the June 2008 survey, 1,162 respondents completed the survey. For the November 2008 survey, 961 respondents completed the survey.

Participants were asked the same questions in the 2008 survey as in the 2007 survey. For the 2008 survey a few additional questions were added for clarity or to cover new information like Service Pack 1 and Windows 7.

Participants in both surveys represent a range of job functions within IT that included a fairly even split between front-line IT professionals, IT managers and IT executives. See **Figure H** for a detailed breakdown.

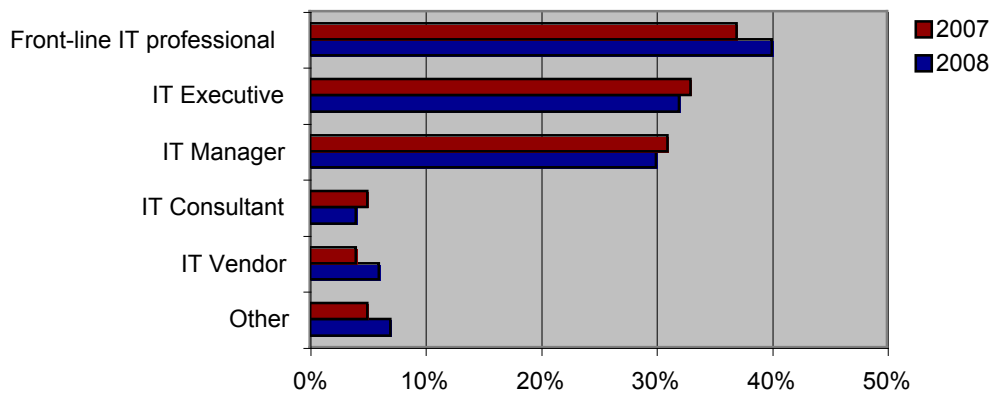


Figure H: Participant Job Functions

Almost all of the participants in the survey currently have Windows operating systems deployed in their environments (99+% in both surveys). More than half of participants (53% in 2008 and 55% in 2007) also have non-Windows operating systems deployed on desktop or laptop computers.

The survey was conducted using Zoomerang, an online survey tool. This survey was sponsored by KACE, the leading provider of systems management appliances. Respondents were not compensated for participating in the surveys but were offered copies of the final report.

The report on the original survey can be downloaded free of charge from www.kace.com.



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