Windows Server System Magazine ™

Building Enterprise
Systems with
.NET Connectivity

Subscriber Survey
August 2004

Subscribers to *Windows Server System Magazine* are IT professionals and technical managers.

METHODOLOGY

This Web-based survey was sent out in August 2004 via e-mail to 15,000 *Windows Server System Magazine (WSSM)* subscribers. We received responses from 806 subscribers, or 5 percent.

PURPOSE

This comprehensive survey of *Windows Server System Magazine* subscribers was conducted to:

1. Profile subscribers by providing demographic information and information on their companies

2. Compare the technologies subscribers are currently deploying with what they were supporting this time last year

3. Examine the role subscribers play in purchasing technology for their companies

4. Find out what is being evaluated for purchase in the next 12 months

EXECUTIVE SUMMARY

Subscribers to *Windows Server System Magazine* fall into two main job function categories: IT professionals including network managers and systems administrators, and technical managers made up mostly of IS managers and IT department and project leaders.

Although Windows technology is prevalent, subscribers' companies cannot be labeled "Windows shops." Along with Windows, subscribers support Unix, Linux, Solaris, and IBM. Subscribers are working with leading edge technology. This is reflected in the number of subscribers supporting the latest version of the Windows operating system and Microsoft's Windows Server System.

WSSM subscribers face the dual challenges of getting disparate systems to work together and deploying *new* technology. To meet these challenges, subscribers need tools and services that work. It's not surprising that *WSSM* subscribers influence purchasing of a wide range of third-party technology.

Subscribers are active readers. Over half save their copies of *WSSM* for reference. Over three-quarters pass on information they've discovered in *WSSM* to colleagues. Over half log on to advertisers' Web sites and download products for evaluation.

Subscriber Profile

JOB TITLE

***WSSM* Readers Represent the Most Important Segments of the IT Market**
WSSM subscribers are technical managers and IT professionals. Technical managers, not to be confused with C-level management, make up that critical, highly influential layer that drives the implementation of new technologies. IT professionals are the people who put it all together.

***WSSM* Technical Managers**

- Technical directors
- Project leaders and supervisors
- Computer operations managers
- Chief engineers
- Strategic architects

***WSSM* IT Professionals**

- Network managers
- Systems administrators
- Database administrators
- Exchange administrators
- Systems architects
- Systems engineers
- Systems analysts

Subscribers represent the most important segments of the IT market.

Windows Server System Magazine Subscribers, by Title

Consultants 3%
VARs 1%
Non-Technical 1%
1% 3% 1%
Technical Management 31%
31%
64%
IT Professionals 64%
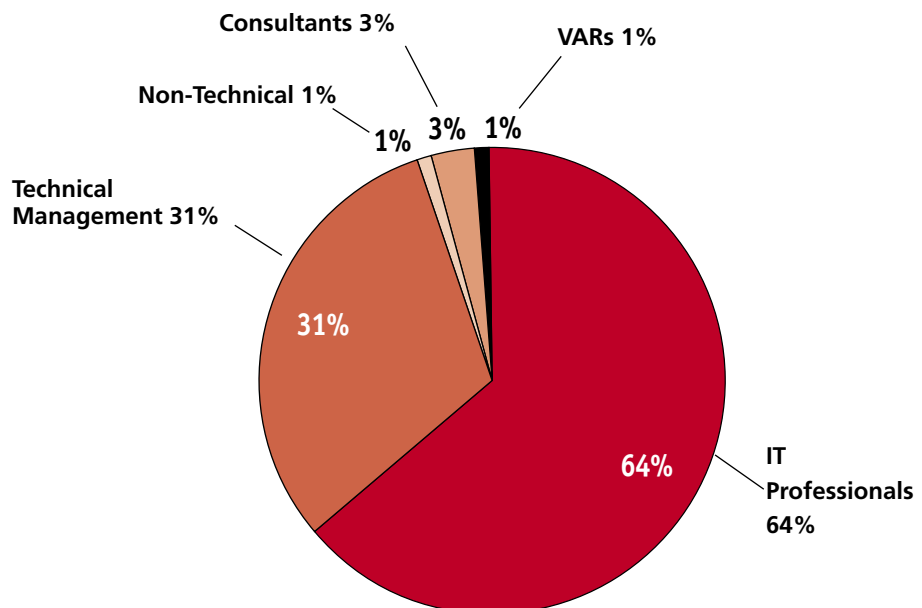
JOB FUNCTION

Job title is only one way of looking at what technical professionals do. When we asked *WSSM* subscribers to list their job functions as well as their formal title, we got a look at the wide range of responsibilities these people take on.

FUNCTIONS *WSSM* SUBSCRIBERS PERFORM REGULARLY

Bar chart with the following categories (from top to bottom): Systems Administration, Network Management, Database Administration, Exchange Administration, Manage Technical Teams, Manage Network Security Systems, Legacy System Migration. X-axis ranges from 0 to 80% in increments of 20%.
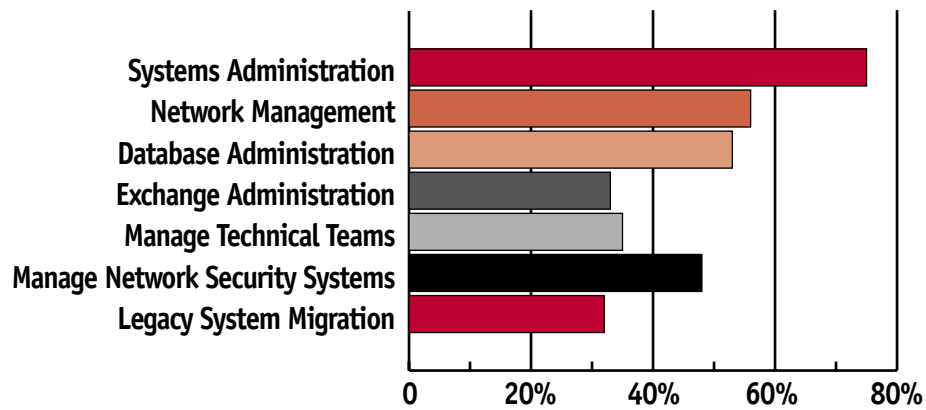
Function	Percentage
Systems Administration	75%
Network Management and Optimization	56%
Database Management	53%
Implement/Manage Network Security Systems	48%
Implement/Manage Backup and Recovery Systems	48%
Implement/Manage Internet Security	41%
Manage Technical Teams	35%
Exchange Management	33%
Legacy Systems	32%
Application Development for Mobile Devices	19%

94% of subscribers are involved in the technical purchasing process in their companies.

Subscriber Averages

- The average number of employees in *WSSM* subscribers' companies - **6,887**
- Percentage of subscribers involved in the technical purchasing process in their companies - **94%**
- Average dollar value of computer equipment, tools, services, and software subscribers are involved in purchasing annually for their companies - **$2.3 million**
- Average amount subscribers' companies will spend on computer technology this year - **$8.5 million**

Windows Server System Magazine **subscribers are qualified based on their use of Windows Server 2003.**

The Technology They Use

97% Increase in Windows Server 2003 Use in the Past 12 Months!

WSSM subscribers are qualified based on their use or planned use of Windows Server 2003. So, it's no surprise that subscribers are early adopters of that platform. Sixty-five percent of *WSSM* subscribers are now supporting Windows Server 2003 in their companies, and a third are evaluating it now for adoption in the next 12 months. If that third does move on to Windows Server 2003 in the next 12 months, virtually all will be supporting that platform by August of 2005.

Over Half Already Support Microsoft's Windows Server 2003 Operating System

August '04 Survey	*Currently in Use*	*Under Evaluation*
Windows Server 2003	65%	33%
August '03 Survey		
Windows Server 2003	33%	54%

The increase in support for this next evolution of the Windows platform is amazing, but system-wide deployment takes time. Currently, 20 percent of subscribers' companies have more than 50 percent of their systems running on Windows 2003. We asked subscribers what roadblocks they face in migrating. *Budget* and *resources/staff* top the list, with the *difficulty of dealing with legacy systems* coming in third.

Still, the continued spread of Windows Server 2003 throughout the enterprise seems inevitable. The perceived benefits subscribers cite for migrating are overwhelming. Here are the "roadblocks" and the perceived "benefits" side by side.

Roadblocks to Windows Server 2003 Migration (2004 Survey)		Perceived Benefits	
Budget	48%	Enhanced Security	71%
Resources/staff	43%	Enhanced Scalability	54%
Legacy Systems	29%	IIS	49%
Security	12%	Server Consolidation	48%
		Windows Server System	46%

Comparing these perceptions to what subscribers reported last year, we see that, in the course of a year, more *WSSM* subscribers have been impressed with the security features in Windows Server 2003 and with the power of the Windows Server System. Legacy systems have actually increased as a roadblock, and budget and staffing, though less of a problem this year, are still the main roadblocks to migration.

Roadblocks to Windows Server 2003 Migration (2003 Survey)		Perceived Benefits	
Budget	51%	Enhanced Security	62%
Resources/staff	46%	Enhanced Scalability	51%
Legacy Systems	22%	IIS	56%
Security	13%	Server Consolidation	48%
		Windows Server System	35%

THE WINDOWS SERVER SYSTEM

Windows Server 2003 and the Windows Server System were made for each other. Subscribers are clearly taking advantage of this compatibility to reduce costs and develop reliable, secure IT infrastructures designed to support operations now and accommodate future growth.

Servers	Currently In Use	Under Evaluation
SQL Server	75%	8%*
Exchange Server 2003	28%	38%
Exchange 2000 Server	47%	5%
Internet Information Services (IIS)	79%	11%
Internet Security & Acceleration Server (ISA)	24%	18%
Microsoft Operations Manager (MOM)	14%	16%
SharePoint Portal Server	21%	22%
Systems Management Server	30%	17%
Mobile Information Server	4%	9%
Live Communications Server	5%	13%
BizTalk Server	8%	13%
Commerce Server	5%	8%
Application Center	12%	11%
Host Integration Server	6%	6%

* Subscribers are clearly waiting for the release of Yukon – the next version of SQL Server

CROSS-PLATFORM SUPPORT CREATES LARGER MARKETING OPPORTUNITIES

Despite this strong penetration of Windows, it would be inaccurate to label *WSSM* subscribers' companies as "Windows shops." Subscribers support a number of platforms, notably Unix, Linux, and IBM. Because they face the challenge of getting disparate platforms and legacy systems to work together securely, they are a great target for all kinds of third-party tools.

Non-Windows Operating Systems

Unix	43%
Linux	44%*
Solaris	24%
IBM S390	10%
Netware	18%
AS/400	19%
MVS,VMS, VM	17%

* Linux on the desktop came in at 23%

TOOLS & TECHNOLOGY

Nothing defines a technical magazine audience more definitively than the technology it uses, deploys, and supports. *WSSM* subscribers use a wide range of technology to secure and manage their corporate networks. These are IT professionals working on the leading edge, requiring state-of-the-art tools.

TECHNOLOGY IN USE

Exchange is a mission-critical system in every enterprise. A third of *WSSM* subscribers cite Exchange administration as a part of their job function, and they employ tools to help them keep communications open.

Exchange Management Tools	32%
Exchange Migration Tools	16%
Unified Messaging Solutions	10%

Security is IT's biggest concern.

Mastering Active Directory presents a challenge to those migrating to Windows Server 2003. Fortunately, great tools are now available to ease the process.

Active Directory Tools	54%
Windows Migration Tools	23%

Security is IT's biggest concern. So many levels of security need to be implemented and managed. The importance of security can be seen in these dramatic numbers.

Antivirus	86%
Backup Software	79%
Firewall Software	61%
Antispam	60%
Disaster Recovery Tools	46%
Storage Management	40%
Patch Management	34%

Networks, at the center of corporate information systems, require constant attention. *WSSM* subscribers rely on tools that monitor their networks and boost performance.

Network Traffic Monitors	46%
Operation Management/Monitoring Tools	27%
Performance Optimization Tools	24%
Change and Configuration Management	16%
Installation and Deployment Tools	27%

E-businesses and wireless communication are critical to the operations of corporations. Tools to manage these functions are making it easier for *WSSM* subscribers to keep orders coming in and users in touch.

E-business Tools	21%
Wireless Services	39%
Mobile Administration Tools	11%

Information management is still the central focus of corporate information systems.

SQL Server Management Tools	46%
Group Policy Management Tools	33%
Collaboration/Content Management	16%

Technology on the Move

CLOSE TO 20% OF SUBSCRIBERS DEVELOP APPLICATIONS FOR MOBILE DEVICES.

More and more companies are demanding wireless connections to corporate data. This adds to the complexity of network systems and to security concerns. The array of wireless devices *WSSM* subscribers support spans Pocket PCs to cell phones.

Comparing this year's survey numbers with last year's, we see a dramatic increase in the use of RIM Blackberry technology (up 15 percentage points) as well as a significant increase in the use of the Palm (up 7 percentage points), and Tablet PC (up 6 percentage points.). But look out. Twenty-one percent of *WSSM* subscribers are currently evaluating Microsoft's Pocket PC, and 35 percent are looking at their Tablet PC for future deployments.

Many of the servers in the Windows Server Systems set require their own exclusive piece of hardware.

WIRELESS TECHNOLOGY IN USE

	2004	*2003*	*Now Under Evaluation*
Microsoft Pocket PC	42%	43%	21%
Palm	44%	37%	7%
RIM Blackberry	33%	18%	7%
Tablet PC	18%	12%	35%

HARDWARE!

Networks run on servers. What makes the *WSSM* subscriber base such a good market for hardware server suppliers is the fact that many of the servers in the Windows Server System set *require* their own, exclusive piece of hardware.

THE AVERAGE NUMBER OF HARDWARE SERVERS CURRENTLY DEPLOYED IN A SUBSCRIBER'S COMPANY IS 817.

That's a lot of hardware! Comparing numbers this year to last, we see that Dell is holding on to a commanding share of the market, but HP is coming up fast with an increase of 12 percentage points. IBM logged a respectable gain as well with a six-point increase.

Here is what they are using in 2004		**2003**	
Dell	70%	Dell	73%
HP	60%	HP	48%
IBM	40%	IBM	34%
Unisys	6%	Unisys	NA
NEC	4%	NEC	NA
Fujitsu	4%	Fujitsu	NA

WSSM Subscribers and the Corporate Purchasing Process

WSSM subscribers are at the center of the corporate purchasing process. They evaluate, recommend, select, and sign off on technology. They are involved in discussions on platforms and far-reaching technology strategies. They are likely to act as the security czar in an enterprise and are sought out for their opinion on any deployment of new technology.

94% INVOLVED IN THE CORPORATE PURCHASING PROCESS

Recommend and Specify Brands and Suppliers	78%
Evaluate Products and Services	78%
Identify Need	75%
Consult Formally or Informally with Others on Purchasing Products or Services	59%
Help Set Corporate Standards	48%
Purchase	25%
Authorize Purchase	21%

• Average amount a *WSSM* subscriber's company spends on technology annually - $8.5 million
• Average amount *WSSM* subscribers are personally involved in spending on technology annually - $2.3 million

How *WSSM* Subscribers Read the Magazine– And What Else They Read for Technical Information

The editorial mission of *Windows Server Systems Magazine* is to give IT professionals the information they need to make strategic decisions and deploy new Windows technology. Subscribers look to *WSSM* and its online resources for insights, technical tips, solutions, techniques, product reviews, and market analysis. They also use information presented in *WSSM* as a starting point for discussion of new technical solutions.

Over half save their issues for reference. Three-quarters read it and pass on information of interest to colleagues. And subscribers rate technical print magazines at the top of the list of resources they use. Vendors' Web sites and independent Web sites, like our own winservermag.com, run a close second and third.

ACTIONS TAKEN AS A RESULT OF READING *WINDOWS SERVER SYSTEM MAGAZINE*

Passed on Information of Interest to a Colleague	77%
Discussed Implementing a New Solution with a Colleague	62%
Logged on to an Advertiser's Web Site	57%
Downloaded a Product for Evaluation	51%

Favorite Sources of Technical Information

Technical Print Magazines	86%
Vendors' Web Sites	79%
Independent Web Sites (like winservermag.com)	76%
Conferences and Trade Shows	47%
Online Newsletters	36%
Sponsored Webcasts	33%