

IT Industry Straw Poll

*Technology's Opportunities in the
Domestic Economic Cloud*



November 19, 2008

About the IT Industry Straw Poll

CDW conducted the IT Industry Straw Poll during CDW Partner Summit 2008, a conference for 520+ IT industry executives

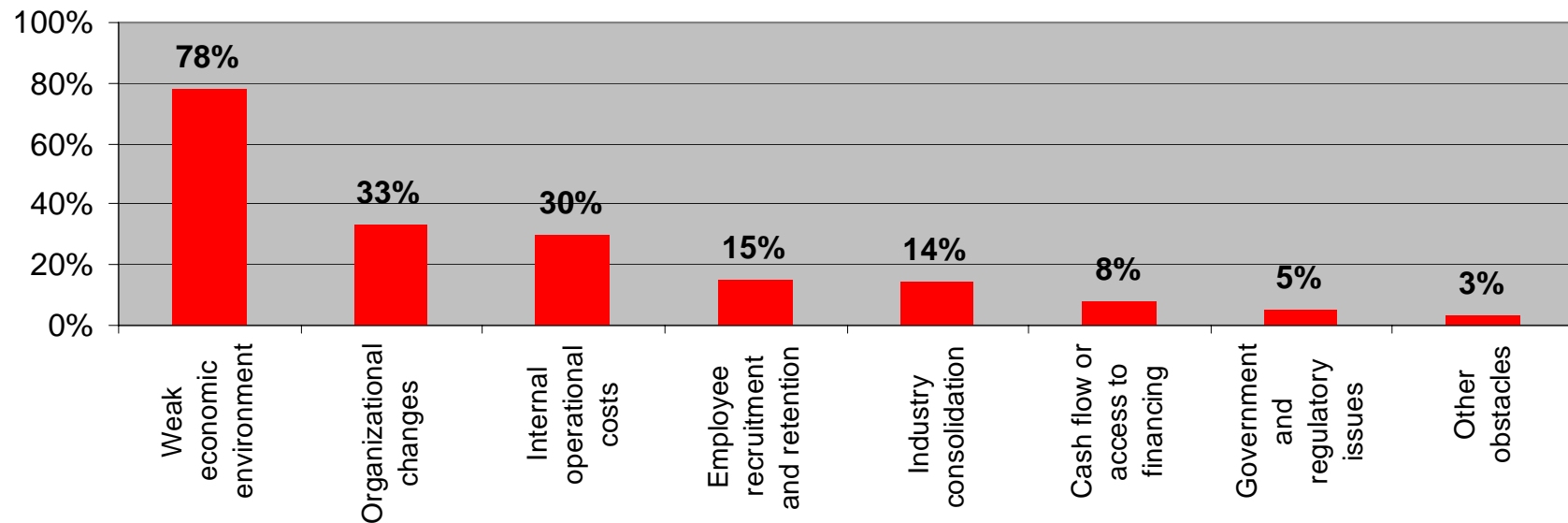
- 273 respondents
- No margin of error calculated
- CDW and its partners donated \$10 for each completed survey to Operation Homefront for use in supplying computers to the families of deploying soldiers to enable e-mail communication



Realizing the Economic Impact

Without question, the economic downturn is creating challenges – for top line sales as well as organizational management and cost control

Biggest Challenge of 2008



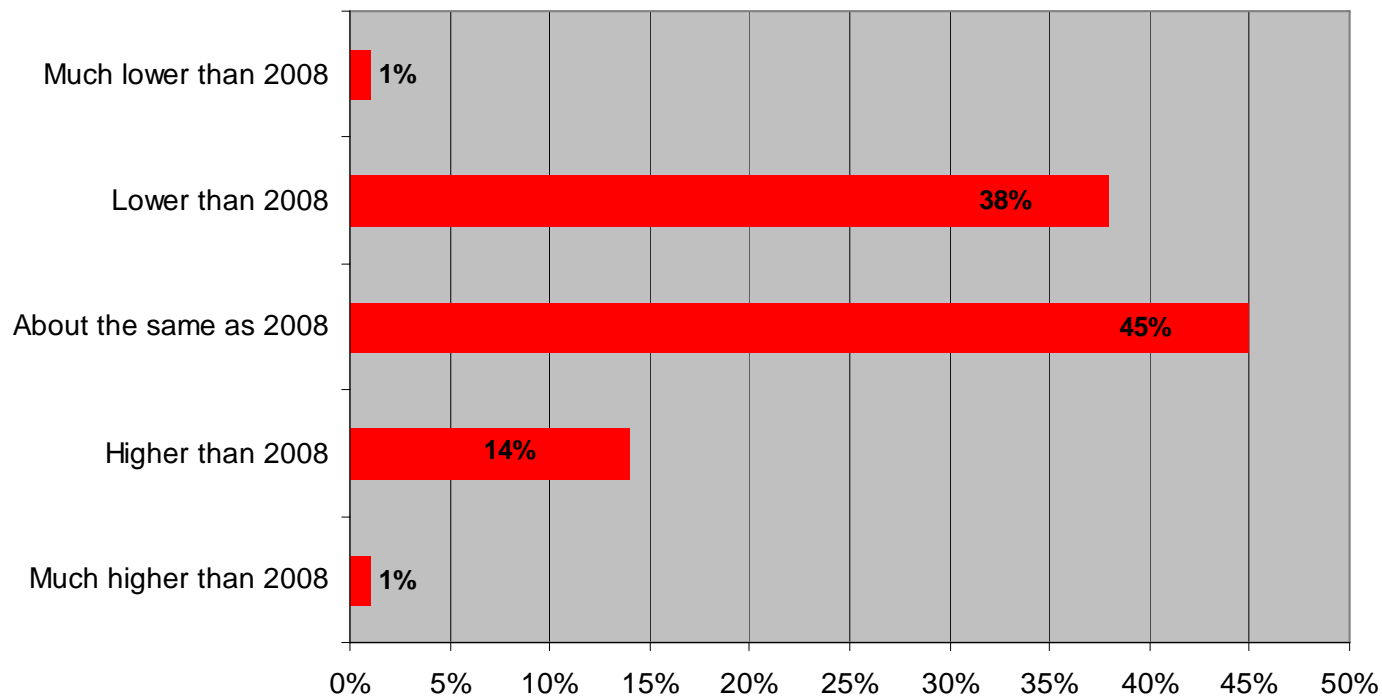
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Viewing 2009 Realistically

Though many customer budgets will shrink, IT companies expect 60 percent of customers to maintain or increase their budgets over 2008

2009 IT Spending Will Be:



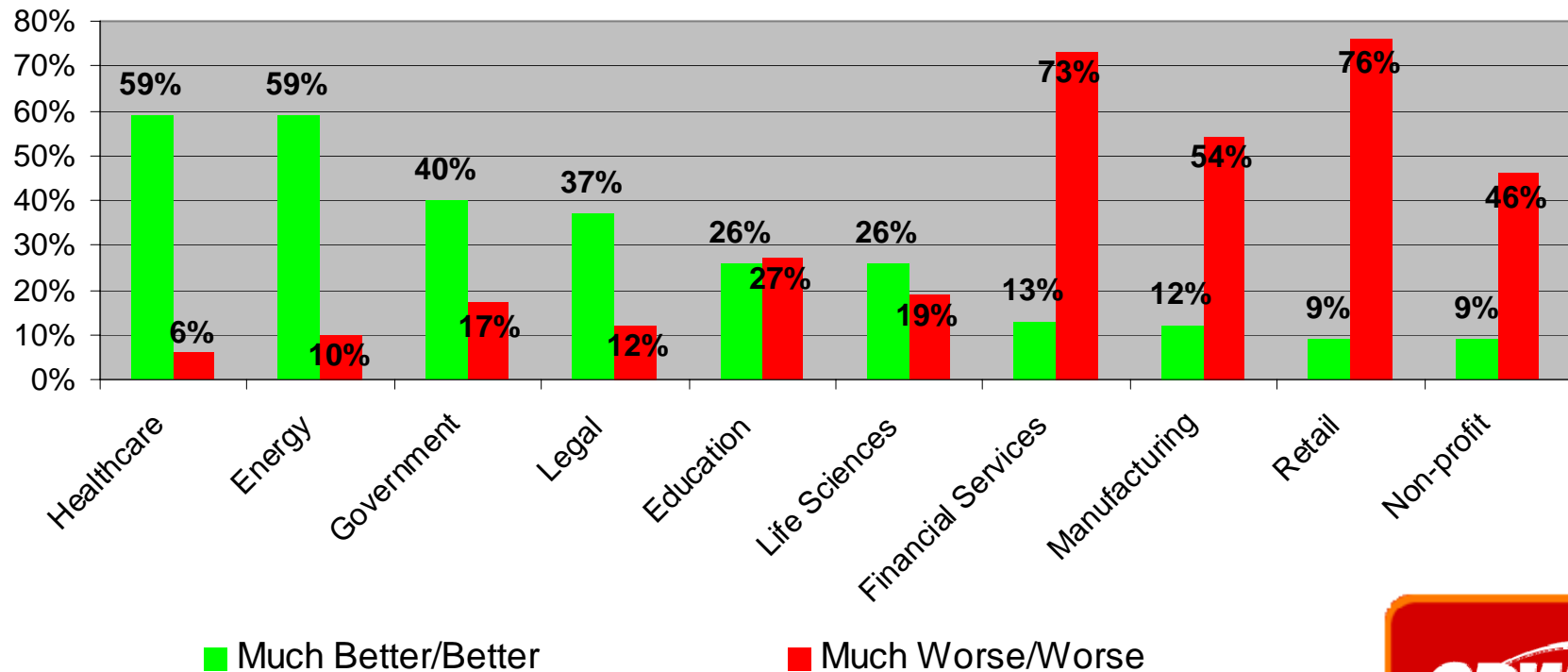
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Expressing Cautious Optimism – Verticals

Healthcare, Energy and Government look to be promising growth markets for the IT industry

How Would You Rate the 2009 Budget Outlook for the Following Industries?



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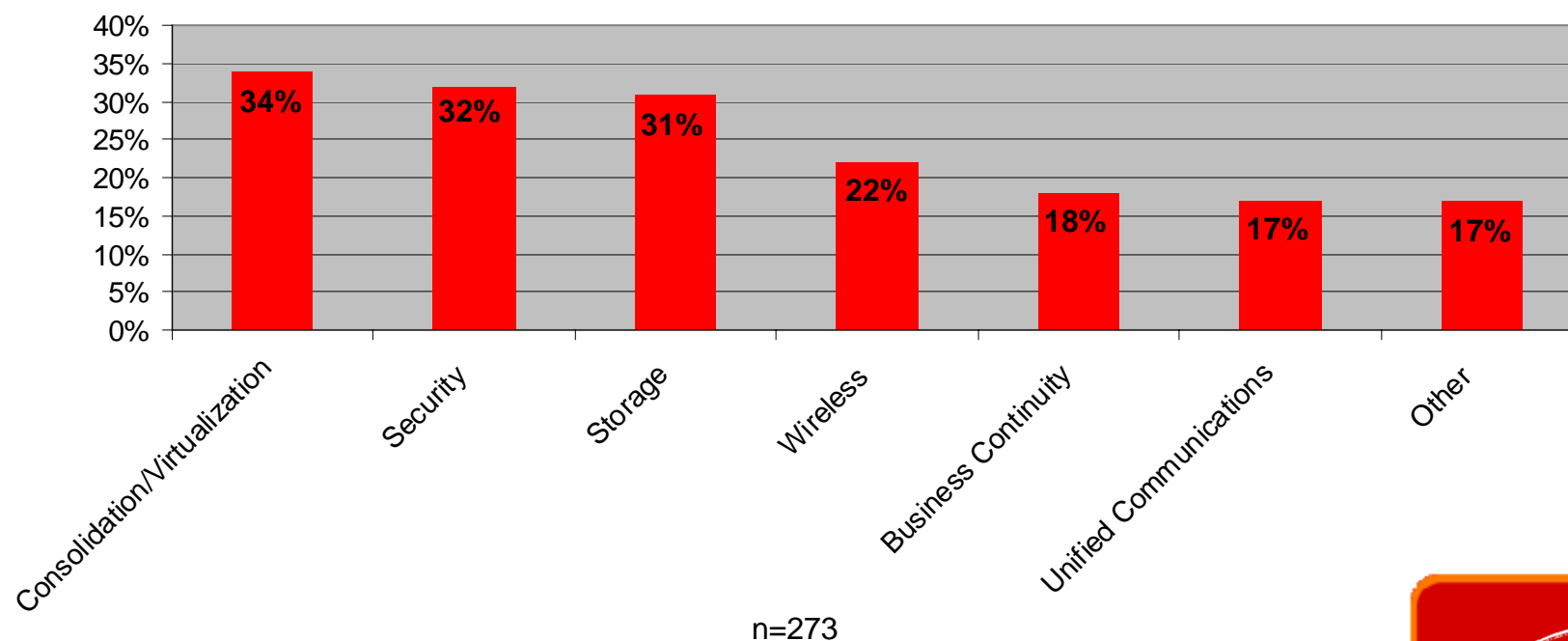
Cite as CDW's IT Industry Straw Poll 2008



Anticipating Growth – Technologies

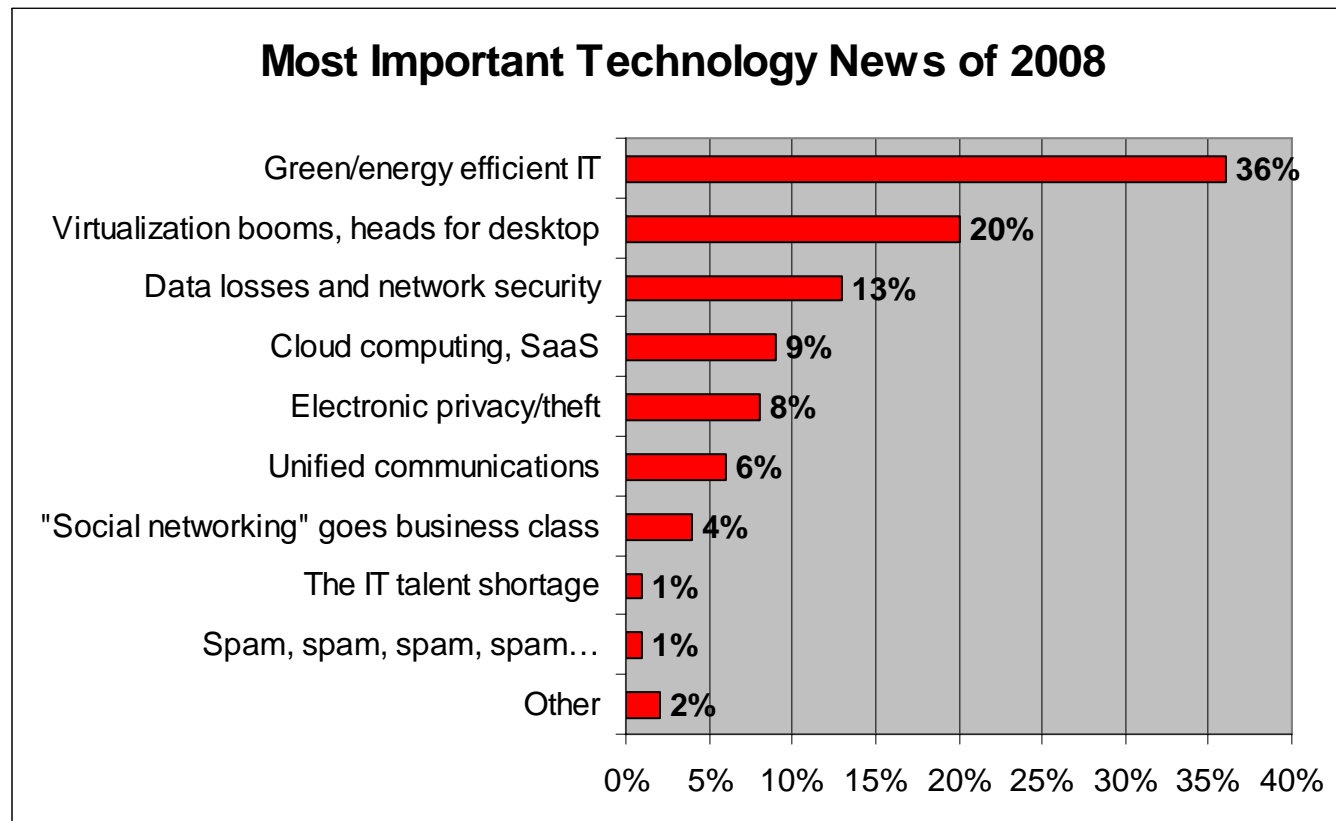
As companies look to reduce costs and meet basic needs, the Virtualization, Security and Storage categories expect to maintain growth or accelerate

In What Technology Areas Do You Expect to See Growth for 2009?



Driving the News

Industry leaders rate energy efficiency and virtualization among this year's top tech news topics, aligning with where they see opportunities in 2009



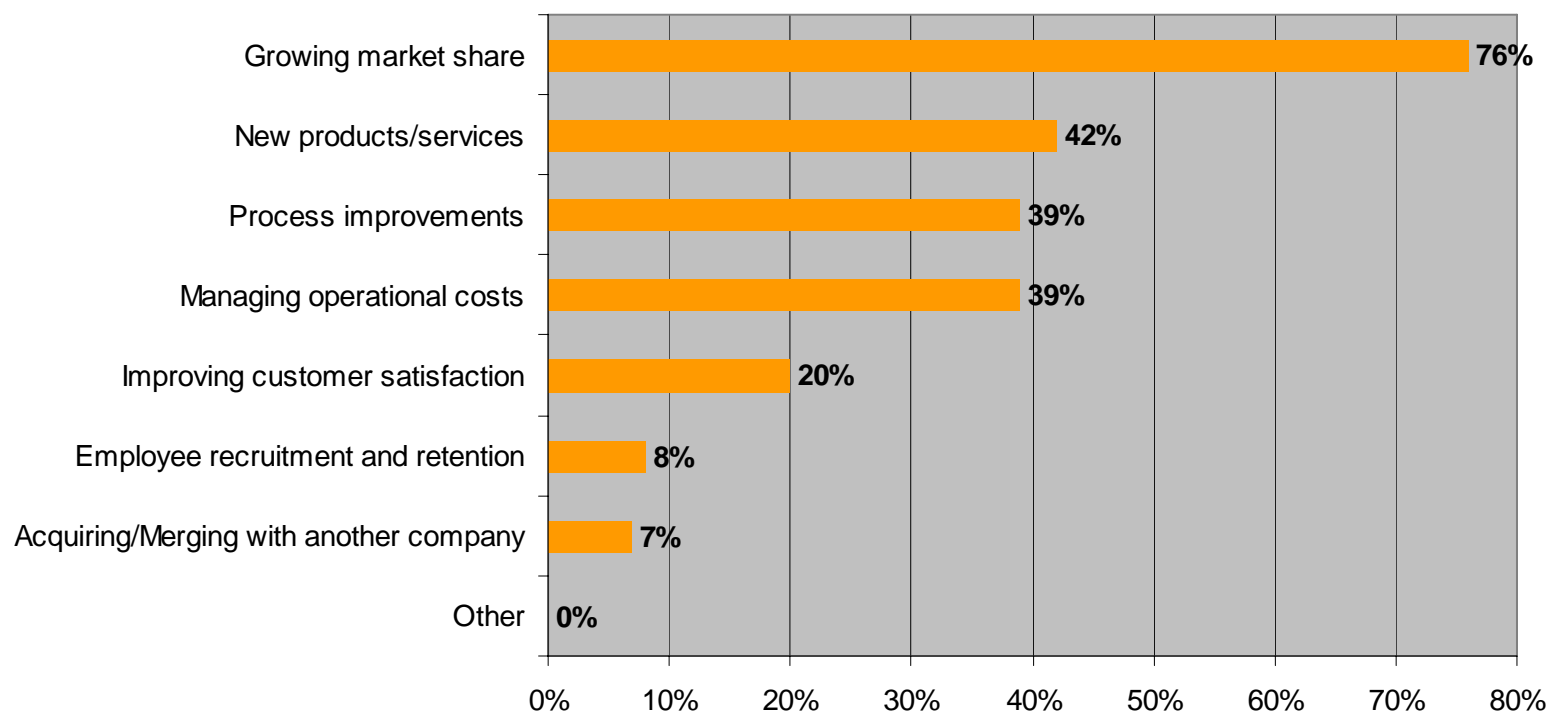
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Rising to the Challenge

Expect increased competition in the IT market as companies look to grow share and deliver new offerings to the market

Top Business Priorities for 2009



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Thank You!

Questions?

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