From: Jeff M. Johnson
Sent: Friday, March 28, 1997 8:27 AM
To: Bill Veghte; Jonathan Roberts; Megan Bliss; Carl Stork; Moshe Dunie
Cc: Bob Foulon
Subject: RE: ie data

That answer to your questions is in Bob's mail that Jonro forwarded.

33% of the time IE is downloaded
25% of the time it comes with their PC
25% of the time it come with their subscription (likely MSN)
6% of the time it comes with another program (Office, etc.)
The other ten percent are miscelaneous means, like got it from a friend, got it from work, etc., that are each 1 or 2%.

I still don't feel like I completely understand this market. But it is pretty clear that current IE customers are often getting it with their PC, and the focus group data that Christian collected also stated that Netscape users aren't likely to switch to IE until it is integrated into the OS a la the Memphis prototypes that they were being shown.

---Original Message---
From: Bill Veghte
Sent: Thursday, March 27, 1997 7:06 PM
To: Jonathan Roberts; Megan Bliss; Jeff M. Johnson; Carl Stork; Moshe Dunie
Cc: Bob Foulon
Subject: RE: ie data

Bob:
The question then becomes when they are getting IE, how frequently is it via a bundle w/ OS vs thru something like MSN or buying standalone at retail.

-----Original Message-----
From: **Jonathan Roberts**
Sent: Thursday, March 27, 1997 3:57 PM
To: Bill Veghte; Megan Bliss; Jeff M. Johnson; Carl Stork; Moshe Dunie
Cc: Bob Foulon
Subject: RE: ie data

Attached is Bobfou's response to me on this. Bob, feel free to elaborate. I've asked Jeff and Bob to really look at why people who get IE with a new machine switch to Nav and what is being addressed in IE 4.0 to make that difficult. Finally, what should we do to improve.

From Bobfou
since only 30% of internet users have ever downloaded a new browser (they use what comes with their pc or comes with their ISP sign up kit), the only real chance IE has of getting them to switch is thru a new pc, an OS upgrade or a new ISP kit.

Net net. 33% of IE users downloaded IE. Here's how the rest distributed in terms of how it was acquired:

- 25% of IE users got IE with a new PC
- 6% got it with another program (e.g. windows or office),
- 25% say it came with a subscription (most likely MSN).

-----Original Message-----
From: **Bill Veghte**
Sent: Thursday, March 27, 1997 2:54 PM
To: Jonathan Roberts; Megan Bliss; Jeff M. Johnson; Carl Stork; Moshe Dunie

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Subject: RE: ie data

This is great data... The question that we need to be answer crisply (maybe it is in the data below and I am just too dense) is:

what percentage of IE users got it because it came bundled w/ the OS (i would consider coming w/ computer to fall in that camp since we have historically delivered IE w/ our OPKs)?

We touch the edges of this on the basis of 25% getting it w/ their computers but we don't talk about the other 75% and how they got it (eg thru OS bundle, etc).

Thanks!

-----Original Message-----
From: **Jonathan Roberts**
Sent: Thursday, March 27, 1997 2:25 PM
To: Bill Veghte; Megan Bliss; Jeff M. Johnson; Carl Stork; Moshe Dunie
Subject: FW: ie data
Importance: High

Okay guys, this validates why it is important to keep IE with Memphis.

-----Original Message-----
From: **Bob Foulon**
Sent: Thursday, March 27, 1997 2:22 PM
To: Jonathan Roberts
Subject: FW: ie data
Importance: High

here is kumar's (chase's research guy) analysis re ie adoption.

-----Original Message-----
From: Kumar Mehta
Sent: Thursday, March 27, 1997 1:35 PM
To: Bob Foulon
Subject: ie data

Bob, here is some info. on how people get and use IE that might help you guys. My feeling, based on all the IE research we have done, is that it is mistake to release memphis without bundling IE with it.

- IE users are more likely than other browser users to get it with their computers. Overall 20% of people who use IE at home obtained it with their computer; and 24% of those using IE at work got it with their computer. Effectively we would be taking away the distribution channel of almost a quarter of all IE users.

- Overall 34% of all surfers (not just IE users) have ever downloaded a browser. That means 66% of everybody on the web has never downloaded a browser.

- Almost 60% of all surfers have never downloaded any software from the web. my sense is that these people are not very likely to download anything, let alone a browser that takes 2 hours to download, from the web

- 80% of those who do not use IE say they have no plans to switch to it. which means that if we take away IE from the o/s, most nav users will never switch to us.

- Also from all our research with IS and web professionals we know that they eventually expect us to win the browser war because Ie will be bundled with the operating system and they will have no real reason to purchase navigator.

- Also, we both saw in all our groups with end users and IS that the integration of the

browser and the operating system was a very compelling feature.

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