

**From:** Elaine Werffell  
**Sent:** Wednesday, June 16, 1999 4:54 PM  
**To:** Robert (Robbie) Bach; Robert (Robbie) Bach's Direct Reports; John O'Rourke Leads; David Eastman; Tom Youtsey; Home & Retail Division Marketing FTE; Monthly PC Data Summary Mail Recipients; John Traynor  
**Cc:** Debbie Holbrook; Jeffrey Hulskamp (Volt Accounting)  
**Subject:** April 99 Consumer Market Share Highlights

April 99 PC Data Sell-Thru information is in and below you will find top line comments and share chart on our Consumer Business. In addition there are attachments at the bottom showing Top Consumer Publishers and Top Title info by category.

**Overall Consumer Market:**

- Microsoft
  - Slight unit share improvements over last month and last April as our overall growth of 30% on units stayed ahead of the market unit growth of 13%.
  - Our \$ Share was the same as last month and slightly lagged last April with flat \$ growth while the market grew 5%.
  - Microsoft improved from #4 to #3 \$ Publisher as Intuit declined more than the market due to the end of Tax season.
  - Slight \$ share decline with a unit share improvement in comparison to last April. Microsoft had a decline in average \$/unit of \$11.40 pre-rebate, the largest drop in \$/unit of any Top 10 Publisher (*Reasons: Lower average \$/unit at cash register for Age and Encarta Line as well as mix shift from higher price to lower price products*)
  - Microsoft enjoyed higher share compared to last April in each specific category tracked below
  - Intuit was the Top 10 Publisher that lost the most share vs last month (down 3.8 \$ share points) as Tax Season ends
  - Havas was the Top 10 Publisher that lost the most share vs last April (down 5.2 \$ share points) primarily due to the decline in Starcraft which last April made up 24% of their \$ and this April accounts for 3% of their \$
  - Learning Co. maintained their #1 unit and \$ Publisher position and gained the most share of any Top 10 Pub vs last month (3.9 \$ share points)

**Games:**

- Microsoft:
  - Very small \$ share decline from last month while larger share increase from last April
  - *By \$: Held 4 in the Top 25*
    - *Flight Sim maintained as the #8 top selling game*
    - *Combat Flight Sim dropped from #9 to #12*
    - *Links LS 99 increased 1 to #22*
    - *Age of Empires decreased 3 to #25*
  - *By Units: Out Top 2 unit sellers were Age: Rise of Rome at #7 and Flight Sim Classic at #15*
  - Hasbro was the Top 10 Games Publisher with largest gains vs last April (up 5.5 \$ share points) fueled by new Family entertainment titles as well as new Microprose titles from them
  - Activision was the Top 10 Games Publisher with largest gains vs last Month (up 2.4 \$ share points) boosted by the new #1 games title Civilization: Call to Power

**Mainstream Encyclopedia:**

- Microsoft
  - Share took a large drop this month from 43% to 36% on \$ and from 42% to 33% on units
  - *Encarta Standard* maintained as the #1 ME title on both units and dollars but actual volume dropped 25%, ERS volume dropped in half from previous month, while *Encarta Deluxe* dropped 34% in volume. All three titles lost ground as the ME market only dropped 8% from March to April
  - *Encarta line (Standard, Suite, Deluxe)* were #1, #6 and #7 on \$, #1, #8 and #6 on units
  - Microsoft is #1 Publisher on \$ but dropped to #2 Publisher on units behind TLC
  - WorldBook maintained the share gained in March while large increases for Compton's 99 Deluxe, due to 2 net to zeros at CompUSA and 1 at Best Buy, pushed Compton's up 9 share points.

**Integrated:** Works continues to do well *Works Suite* was our #1 title on \$, our only title in Top 10 for Consumer market

**Home DTP:**

- *Greetings 99* is responsible for half of Microsoft's Home DTP share decline while *Home Pub* was responsible for 30% of the drop.
- Microsoft remained the #3 Publisher on both units and \$
- *Print Shop Deluxe 6.0* remains the dominant #1 title in this market with 19% \$ share for TLC who has 71% \$

FL AG 0003148  
 CONFIDENTIAL

share overall on Home DTP

**Imaging:**

- MS gained some additional share but still remains #2 Publisher on units and \$
- MGI maintained the #1 position this month with a one week post rebate price of \$4.99 at CompUSA, while Adobe lost over 4 share points

**Mapping:**

- MS dropped to the #2 Mapping Publisher on \$ as despite Expedia Streets & Trips 2000 zooming up the charts to #2 on units and \$ helped by a Best Buy net to zero.
- The Learning Company rocketed to the #1 Publisher in Mapping on units and \$ with the #1 unit and \$ title National Geographic's Trip Planner Deluxe. This title was helped along with a CompUSA net to zero.
- Expedia Streets & Trip Planner 98 dropped from #1 last month to #9 as it reaches its end of life quickly

**Personal Finance:** MS \$ share declined due to a mix shift with over 70% of unit sales this month going to Money Standard

**April '99 Consumer Software Share**

	\$							Units						MS Un Sh Go
	\$ Rank	\$ Share	\$ Share +/- from Mar 99	\$ Share +/- from Apr 98	MS \$ Growth	MKT \$ Growth	MS \$ Share Goal	Unit Rank	Unit Share	Unit Share +/- from Mar 99	Unit Share +/- from Apr 98	MS Unit Growth	MKT Unit Growth	
	Apr-99	Apr-99	Apr 99 vs Mar 99	Apr 99 vs Apr 98	Apr 99 vs Apr 98	Apr 99 vs Apr 98	FY '00	Apr-99	Apr-99	Apr 99 vs Mar 99	Apr 99 vs Apr 98	Apr 99 vs Apr 98	Apr 99 vs Apr 98	
Microsoft Consumer Overall	3	7.9%	Same	-0.4	0%	5%	9%	7	4.9%	+0.2	+0.6	30%	13%	5
Microsoft in:														
Games	5	7.1%	-0.1	+0.9	13%	-1%	9%	7	5.4%	+0.3	+1.4	41%	4%	5
Mainstream Encyclopedia	1	35.5%	-7.4	-3.7	35%	49%	50%	2	32.7%	-9.6	+5.9	160%	113%	4
Integrated	1	98.3%	+0.3	+13.3	5%	-9%	95%	1	93.7%	+0.2	+12.5	4%	-10%	9
Home DTP	3	6.2%	-1.3	-0.1	23%	24%	12%	3	4.9%	-1.6	-0.4	25%	34%	1
Imaging	2	30.6%	+2.2	+10.7	83%	19%	35%	2	23.7%	-0.3	+6.8	80%	28%	2
Mapping	2	18.0%	-6.7	+6.9	118%	36%	22%	4	14.4%	-4.8	+7.3	269%	82%	1
Personal Finance	2	18.7%	-1.8	+5.5	43%	1%	22%	2	23.8%	Same	+4.5	40%	13%	2

Note: Overall Consumer includes Games, Kids, Reference, Personal Interests, Creativity, Productivity, Finance, Sampler-Promo

If you are interested in looking at the Top Publishers or Top Titles for April in each of the above categories, please reference attachments.



US Top Titles  
Apr 99.xls



Standalone Top  
Publishers Cons

Please let me know if you have any questions or want further information.

Thanks,  
Elaine

FL AG 0003149  
CONFIDENTIAL

HIGHLY CONFIDENTIAL