

From: Brad Chase
Sent: Monday, September 08, 1997 3:49 PM
To: Bill Gates; Paul Martz; Steve Ballmer
Cc: Brad Silverberg's Direct Reports; Kumar Mehta
Subject: FW: web professionals tracking ppt

we just completed our third web professionals tracking study. we have done this two other times over the past 18 months. the results are pretty interesting. I enclose the presentation below. Some highlights:

- 422,000 active ".com" sites in the US versus 273K in jan of 97 and 180K in sept of 96
- almost half of these people have an intranet site
- most use their site for marketing products. about half use it for service and support
- IE share has stayed stable over the last six months with web professionals. nonmaternal increase of 2% to 28%.
- These professionals think our overall share is 36% (nav 58%). In 12 months they think we will have 45% share. Both these estimates are 5 points higher than they thought six months ago
- 79% of sites claim to optimize their site for Nav or Nav and IE. 54% claim to optimize their site for IE or Nav and IE.
- In terms of leadership perception most people do not mention us, netscape or sun as companies they can trust
- Consistent with other leading studies Netscape is still perceived among this audience as having "the best browser" and "setting standards on the internet". This audience sees us as having the best tools
- Netscape has had a material drop in people's perception of the quality of their products
- Good momentum for NT as a web server. Of the businesses or web professional companies (isps, hosters etc.) who bought a server during the last six months over 60% of their purchases have have been NT
- Not much use of activeXcontrols on the web
- Front Page is the leading tool
- Site Builder is well known compared to its Netscape competitor

-----Original Message-----

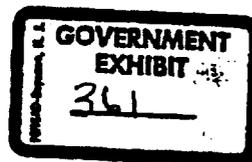
From: Kumar Mehta
Sent: Wednesday, September 03, 1997 5:09 PM
To: Brad Chase's Direct Reports; Travis Howland; Robert Bennett; Sue Bohn
Subject: web professionals tracking ppt

here is the web professionals tracking presentation from yesterday.

pis call with questions.

Kumar.

web pro tracking
wave3.ppt



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Web Professionals Tracking
(wave III)

August, 1997

Kumar Mehta

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Web Professionals or Site Builders

- Involved in either the design, development; maintenance or management of an internet site or an intranet .
- Distinct segments within this community
 - Site Developers
 - Site Designers
 - Site Administrators
 - *Managers*
 - *Part Timers*

Web Professionals Tracking

- Track Site Builders along key MS metrics
- Phone Survey with 697 web professionals
 - 250 Site Developers (125 internal and 125 external*)
 - 226 Site Designers (125 internal and 101 external)
 - 106 Managers
 - 89 Part Timers
 - 19 Site Administrators
- Sample from random “.com” sites

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*Internal refers to any company that has a www site; i.e. company.com.
external refers to companies in the biz. of providing web related services

RESULTS

- Profile
- Browser metrics
- Server Metrics
- Leadership Perceptions
- Technology Adoption

Site Builders Profile

- Personal Profile
- Company Profile

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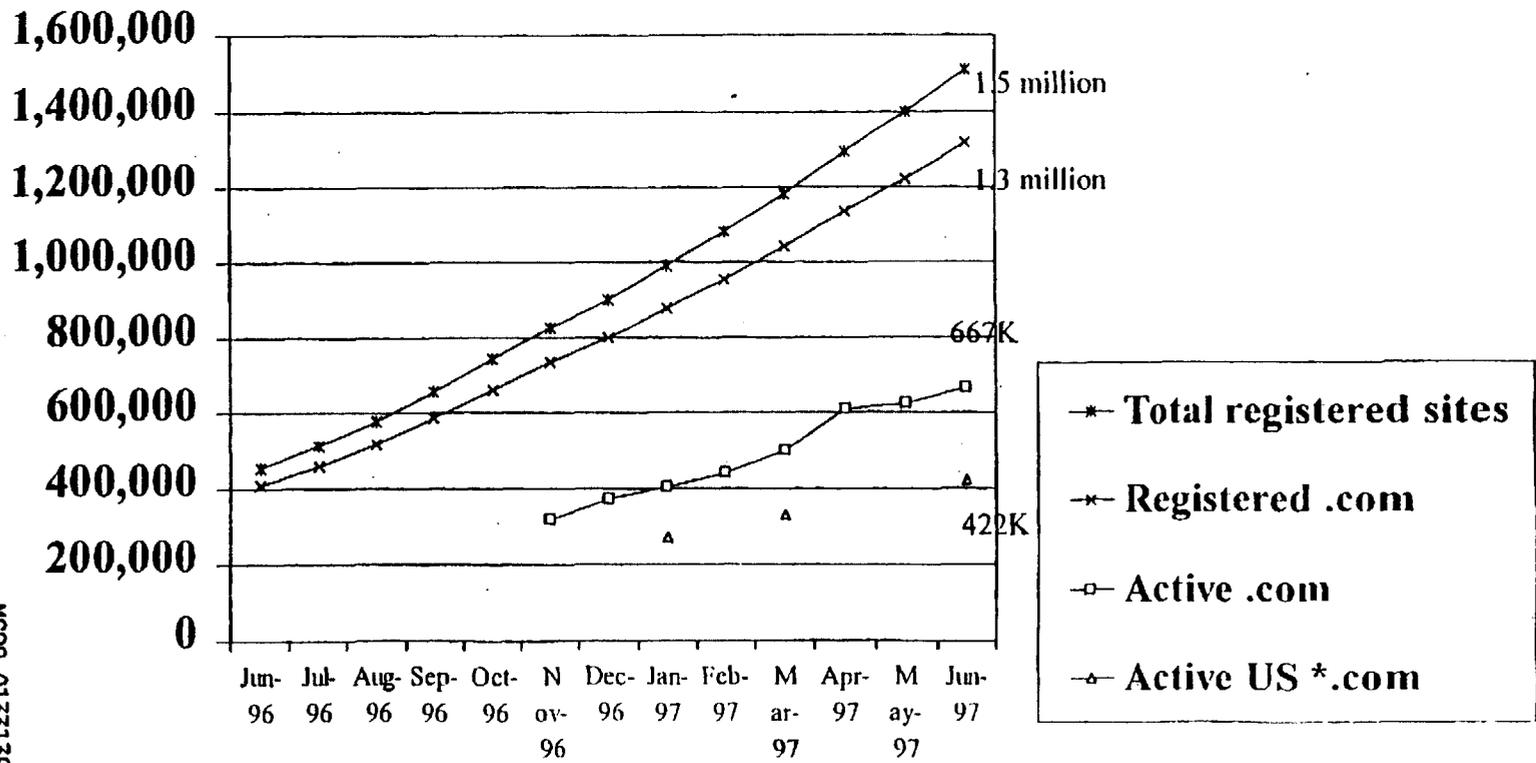
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Internet Explosion:

- We estimate there are approx. 422,000 active “.com” sites in the US
 - January 1997: 273,000 active web sites
 - September 1996: 180,000 active web sites

- 46% of these companies have an Intranet
 - January 1997: 41%
 - September 1996: 34%

Growth of the www



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Site Builders: How Many?

- We estimate 1.75 million in the U.S*.
 - 357,000 Site Developers
 - 234,000 Site Designers
 - 37,000 Site Administrators
 - 492,000 *Managers*
 - 628,000 *Part Timers*

628,000 Professional Web Site Builders

* as of September 1996

Site Builders/Developers

- 59% have developed software/written code
(38% are professional developers)

	<u>Written code.</u>	<u>Prof. Devs.</u>
• Overall	59%	38%
• Site Developers	74%	58%
• Site Designers	50%	35%

Company.Com Profile (N=464)

- Median Company Size: 32 (mean=787)
- Have had a www site for: 2 years
- % outsourcing site hosting: 57%
- Median hits/week: 400 (300 in Jan 97)
- Have an Intranet: 46%

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this is projectable to the estimated 400K companies with active web sites

Company.com (use of web site)

(.....pls tell me whether you are using your web site for this purpose?)

	Jul 97	Jan97	Sep 96
• Marketing/Products Info:	92%	74%	79%
• Customer Service/Support:	52	46%	49%
• Secure Info. Transfer:	21	23%	21%
• Electronic Commerce:	25	25%	24%
• Integrating site with db:	23	28%	21%
• Provide specific areas only for registered users:	33		
• Personalized ads or content targeted to specific users:	29		

(projectable to approx. 400K active web sites)

Webco.Com Profile (N=203)

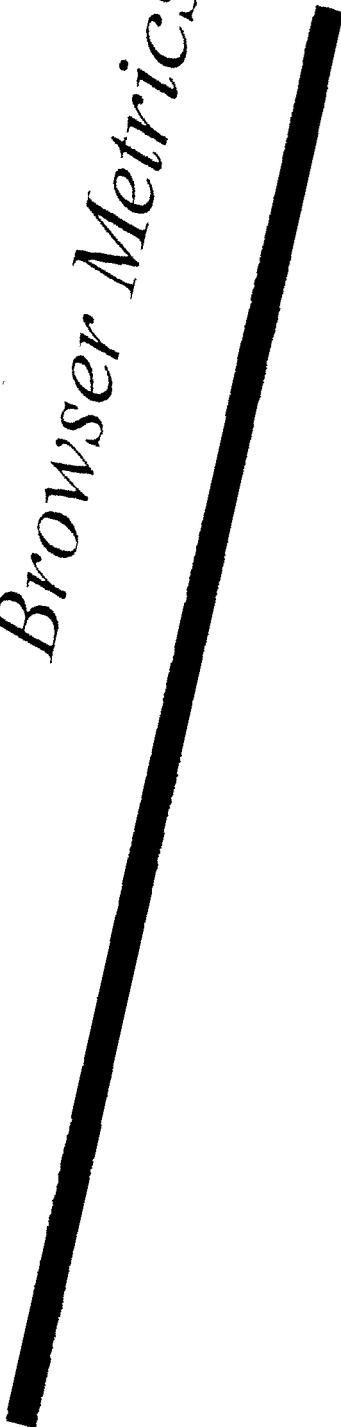
- Median Company Size: 8 employees
- Been in Internet biz. for 2 years
- % of biz. web related: 62%
- Median client site hits/wk: 1000

WebCo.com

areas of business

	Total	Primary
• Web page design and consulting:	89%	42%
• www site hosting for businesses:	65	12
• Intranet Design and consulting:	58	3
• Dial up access for biz. end users:	40	6
• Dial up access for individual users:	37	12
• Hosting companies intranets:	21	1

Browser Metrics



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Web Pro Browser Share

	Jul97	Jan97	Sep96
ALL:			
• IE:	28%	26%	10%
• Nav:	68	70	79
Site Dev:			
• IE:	33	29	13
• Nav:	63	68	79
Site Dsgn:			
• IE:	21	22	13
• Nav:	73	74	84

Perceptions of browser share

- What % of internet users do you think are using:
 - Navigator: 58% (64% in Jan97)
 - IE: 36% (31% in Jan 97)
- In 12 months, what % do you think will be using:
 - Navigator: 50% (56% in Jan 97)
 - IE: 45% (40% in Jan 97)

Browser Optimization:

(based to Internal: Company.com only)

(which internet software browsers is your site optimized for)

	<u>Jul97</u>	<u>Jan 97</u>	<u>Sep 96</u>
• % browser optimized:	35%	45%	51%
• % optimized for IE only*	20%	16%	6%
• % optimized for Nav only*	45%	49%	73%
• % optimized for both*	34%	26%	16%

Overall: 54% optimize for IE vs. 79% for Nav.

Other Browser metrics:

(what browsers do you test the sites you develop with)

- Test Web Site with:

	July 97	Jan 97
– Nav:	88%	82%
– IE:	69%	56%
– Mosaic:	4%	7%
– AOL:	5%	5%

Leadership Perceptions

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Leadership Perceptions

(How important are the foll. attributes in selecting a vendor for web products and technologies):

- High quality products
 - Company You can Trust
 - High quality support/support programs
 - Products help respond to rapid change
 - Leading Edge Technology
 - Best programming tools
 - Cross-Platform support
 - Best Authoring tools
 - Setting standards for the Internet
 - Best Server Software
 - Products that make web more interactive
 - Leader in secure e-commerce
 - Provides best browser
 - Provides a compelling user experience
 - Credible partner for intranet solutions
- 71% + say very important
- 50%-70% say very important
- <50% say very important

Leadership Perceptions

(which company do you most often associate with...)

	<u>MS</u>	<u>NS</u>	<u>Sun</u>	<u>No One</u>
• High quality products	26	19	5	21
• Company You can Trust	15	12	4	43
• High quality support/support programs	21	13	5	39
• Products help respond to rapid change	36	16	3	28
• Leading Edge Technology	29	23	10	15
• Best prog tools for internet	32	9	7	23
• Supplies x-Platform technology	13	25	12	22
• Best Authoring tools	28	11	2	27
• Setting standards for the Internet	24	49	4	10
• Best web Server Software	24	26	2	17
• Products that make web more interactive	18	18	11	22
• Leader in secure e-commerce	6	21	2	39
• Provides best browser	21	68	1	6
• Provides a compelling user experience	21	17	3	33
• Credible partner for intranet solutions	17	12	4	35

Leadership Perceptions: Trends

	<u>Jul97</u>	<u>Jan97</u>	<u>Sep96</u>
–			
• High Quality Products:			
– MS:	26%	26%	20%
– NS:	19	27	33
• Company You Can Trust:			
– MS:	15	17	13
– NS:	12	17	23
• High quality support/support programs			
– MS:	21	20	16
– NS:	13	12	23

Leadership Perceptions: Trends

	<u>Jul97</u>	<u>Jan97</u>	<u>Sep96</u>
–			
• Products help respond to rapid change:			
– MS:	36%	31%	21%
– NS:	16	18	25
• Leading Edge Technology:			
– MS:	29	27	19
– NS:	23	22	31
• Best Programming Tools			
– MS:	32	29	17
– NS:	9	9	12

Leadership Perceptions: Trends

	<u>Jul97</u>	<u>Jan97</u>	<u>Sep96</u>
–			
• Supplies x-platform technology:			
– MS:	13%	11%	11%
– NS:	25	27	28
• Best Authoring Tools:			
– MS:	28	22	13
– NS:	11	13	13
• Setting standards for the Internet			
– MS:	24	24	15
– NS:	49	33	46

Leadership Perceptions: Trends

	<u>Jul97</u>	<u>Jan97</u>	<u>Sep96</u>
–			
• Best Web Server Software:			
– MS:	24%	29%	9%
– NS:	26	19	32
• Provides Best Browser:			
– MS:	21	20	12
– NS:	68	67	75
• Credible Partner for Intranet solutions			
– MS:	17	16	11
– NS:	12	14	12

Company Perceptions

(which company, if any, would you choose as your partner for web related activities)

July 97 Jan 97 Sep96

ALL

- Microsoft 24% 22% 14%
- Netscape 16 18 19
- No One 21 24 23

SITE DEV

- Microsoft 30 29 25
- Netscape 18 23 23
- No One 21 20 19

SITE DSGN

- Microsoft 19 23 20
- Netscape 15 16 29
- No One 23 21 19

Server metrics



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Server o/s

(www servers; NOT intranets)

	Company.com		WebCo	
	Jul97	Jan 97	July97	Jan 97
• % with www server	48%	52%	71%	75%
• % running UNIX:	50	48%	56	61%
• % running NT (S&W):	53	51%	60	57%
• Mac:	4	10%	11	9%
• Primary server o/s				
• UNIX:	46	38%	46	51%
• NT (S&W):	45	41%	41	40%
• Mac:	1	8%	4	3%

WWW server run rate

(thinking about your the most recent internet server you purchased (within last 6 months),
what server os is it running under)

19% of internals have bought a server in the past 6 months and 38% of externals have bought a new web server in the past 6 months. These people's purchases break out as follows:

	Company.com		Webco.com	
	<u>July 97</u>	<u>Jan 97</u>	<u>July 97</u>	<u>Jan 97</u>
• UNIX:	18%	19	30%	38
• NT:	65	62	62	48
• Mac	5	4	1	5

(N=193 for internal and 148 for web services)

Web Server Software:

% companies with at least 1 of the foll. web servers.

	<u>Company.com</u>		<u>webco.com</u>	
	<u>7/97</u>	<u>1/97</u>	<u>7/97</u>	<u>1/97</u>
• Apache:	22%	16%	37%	36%
• Netscape Enterprise:	18	30	18	33
• Netscape Commerce:	11	23	9	25
• IIS:	37	30	44	33
• NCSA:	8	4	9	9
• Sun:	3	6	4	9

Technology Adoption

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Technology Adoption (Internet only)

(for each of the foll. Technologies pls tell me whether you currently use it)

	ALL	Site Devs.
• ActiveX controls:	13%	21%
• Java Applets:	30	52
• VB Script:	15	21
• Java Script:	33	59
• Netscape Plug Ins:	34	50

*Web Site Development and other
metrics*

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Web Site Development Tasks

	All	Dev	Dsgn
• Created a web page:	75%	98%	97%
• Created a web app w/browser on client & prog logic on svr	29	56	24

Authoring tools: share Total and Primary

(what authoring tools do you use to build your web sites; based)

- Based to the 55% of web pro's who personally create work related ww web pages (not Intranet)

	Total	Primary	Pri/Total
- Front Page:	29%	23	.79
- Pagemill:	13	7	.54
- Nav Gold:	12	6	.50
- Hot Dog:	9	4	.44
- MS Word:	7	4	.57
- Note Pad:	7	3	.43
- Hot Metal:	5	3	.60
- Other			

Web Development tools: share Total and Primary (for www only)

(what languages or dev tools do you use to create apps for the internet)

- Based to the 29% who build apps with browser on the client and prog logic or db connection on the server

	Total	Primary	Pri/Total
- PERL:	44%	34	77%
- C/C++:	20	11	55
- Java:	17	8	47
- VB:	13	6	46
- CGI:	5	3	60
- Cold Fusion:	3	2	66
- Access:	3	1	33

SBN Awareness and use (Site Developer only)

	<u>MS SBN</u>		<u>NSCP Dev Edge</u>	
	<u>7/97</u>	<u>1/97</u>	<u>Dev</u>	<u>Dsgn</u>
• Never Heard of it:	26%	29%	43%	42%
• Know the name only:	21	23	25	28
• Know something:	21	16	22	20
• Belong to it:	32	33	9	10

SBN Awareness and use (Site Designer only)

	<u>MS SBN</u>		<u>NSCP Dev Edge</u>	
	<u>7/97</u>	<u>1/97</u>	<u>7/97</u>	<u>1/97</u>
• Never Heard of it:	44%	37%	43%	55%
• Know the name only:	22	28	24	28
• Know something:	13	18	20	17
• Belong to it:	21	17	5	0

IntRAnet vs Internet

- Hypothesis:
 - Are there any differences between WWW activities and Intranet Activities??
 - We found that there are no significant differences between tools and technologies used for internet and intranet development

Intranet Metrics (Browser)

(Is your Intranet optimized for any browsers?? Which browser)

	<u>Intranet</u>	<u>WWW</u>
• % browser optimized:	34%	35%
• % optimized for IE *	35	54%
• % optimized for Nav	63	79%

**based to the 34% who optimize

Intranet Metrics (Authoring Tools)

	Intranet	WWW
- Front Page:	31%	29%
- Pagemill:	13	4
- Nav Gold:	12	11
- Hot Dog:	9	4
- MS Word:	7	8
- Note Pad:	7	3
- Hot Metal:	5	4
- Text Editor:	6	11
- HTML:	8	3

Intranet Metrics (Web Application Development tools)

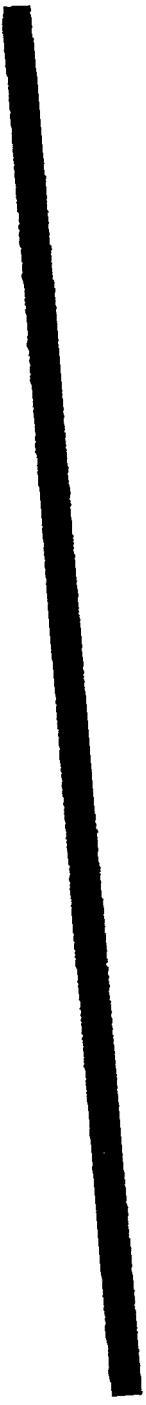
(what languages or dev tools do you use to create apps for the intranet)

	<u>WWW</u>	<u>Intranet</u>
- PERL:	44%	44%
- C/C++:	20	24
- Java:	17	16
- VB:	13	14
- CGI:	5	5

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Key Takeaways:



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Key Takeaways

- WWW keeps on exploding
 - Over 420K active .com sites in US
 - 273,000 in jan 97
 - 180 in Sep '96
- 190,000 Intranets
 - 112K in Jan 97
 - 61K in Sep '96

Key Takeaways

- Browser:
 - IE share stabilizing
 - While perceptions of share getting stronger
 - Nav still leads across all browser categories
- Server:
 - NT strong in all measures
 - especially strong gains in the “external” UNIX dominated segment

Key Takeaways

- Front Page leads Authoring tool category
- PERL leads web application development tools category
- Both Front page and PERL have high depth of use.

Key Takeaways

- Leadership Perceptions:
 - Strengths:
 - Programming Tools
 - Authoring Tools
 - Weaknesses
 - Browser
 - Internet standards setter
- Site Developers are typically more Microsoft friendly
 - We are reaching 4 out of 10 web professionals through traditional developer activities



<http://aicgweb/research>

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