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ZONA RESEARCH BROWSER STUDY REVEALS SIGNIFICANT SHIFT IN PRIMARY

Browser Usage in the Enterprise; 62% of Enterprises with Corporate Browser Policies Choose Microsoft IE

Business Editors & High-Tech Writers

REDWOOD CITY, Calif.--(BUSINESS WIRE)--May 18, 1999--Zona Research, an IntelliQuest company (Nasdaq:IQST), reports in its latest browser study that Microsoft's Internet Explorer has widely surpassed Netscape's Navigator as the primary browser in use in the enterprise.

The study, comprised of 308 enterprises, reveals that 59% of respondents are using Microsoft's Internet Explorer as their primary browser, while 41% of respondents are using the Netscape Navigator. These results are in sharp contrast with the company's October 1998 browser study findings which showed Microsoft's IE trailing Netscape's Navigator by twenty percentage points.

Driving this significant shift towards Microsoft's IE is an increase in corporate browser policies. When asked if their companies encourage or require use of a particular browser, 69% of those surveyed said their companies had such policies. Of the respondents indicating their companies had browser policies, 62% revealed that Microsoft's Internet Explorer was standard while 38% specified Netscape Navigator or Communicator. "The fact that corporate policy dictates over two-thirds of all primary browsers in use reinforces the notion that the desktop browser has long ceased being a personal choice," stated Clay Ryder, Vice President and Chief Analyst, Zona Research. "Designating a primary browser is now part of the greater IT strategy within the enterprise."

Since Zona first began tracking browser usage in January 1996, enterprises with policies dictating browser usage has grown from 33% to 69% of enterprises surveyed. The following table summarizes corporate browser policy and primary browser use in the enterprise. -0- *T Date of % of % of % of % of All % of All Study Companies Companies Companies Respondents Respondents

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Browser April 1999 69% 62% 38% 59% 41% October 1998 63% 54% 46% 40% 60% July 1998 64% 55% 45% 45% 54% September 1997 59% 32% 55% 36% 62% January 1997 52% 26% 74% 28% 70% August 1996 24% 14% 88% 8% 83% April 1996 43%

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17% 83% 4% 87% February 1996 28% 2% 96% 3% 74% January 1996 33% 1% 91% 2% 71% *T -0-

Zona's study also investigated whether enterprises filter or monitor Internet access. The study found that 33% of the respondents indicated that their organization filters Web access based upon a list of approved sites and 20% filter based upon the user's job function. Another 18% indicated their organization filters based upon the size of the transmission, and 13% based upon the time of day. "One-third of the enterprises are filtering employees' Internet access based upon one or more criterion and this sends the message that Internet access is a valuable corporate asset. We believe Internet access within the enterprise is beginning to be viewed in the same fashion as other resources such as the telephone -- a resource that is available for corporate goals and achievement, not random personal use" added Ryder.

The Web Browser Study is a periodic survey conducted by Zona Research that tracks browsers used in a corporate environment. For each study, approximately 300 corporate IT professionals are selected from the IntelliQuest Technology Panel. A complete analysis of all sections of the Browser Study is available on Zona's Web Site at http://zonaresearch.com/browserstudy.

Zona Research Inc. provides superior market analysis and strategic consulting to the Internet industry. Zona Research, an IntelliQuest company (Nasdaq:IQST), delivers qualitative and quantitative information on market trends via subscription services and reports, and offers a variety of custom consulting services.

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