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Prepare your strategy today for software success tomorrow...

Personal Computer Software Market, 1989-1994

Current and Prospective Software Vendors:

- FORECAST your potential market for the next five years efficiently
- EVALUATE the nontraditional software vendors now entering the market and how this trend affects you
- INCREASE YOUR MARKET SHARE by effectively restructuring your software strategy
- DEVELOP your successful software profile based on your customers' real needs, requirements, and criteria
- COMPETE SUCCESSFULLY by assessing your competitors' software strategies
- MAXIMIZE YOUR R & D and customer support strategy by delivering what customers REALLY WANT
- VALIDATE your strategic marketing and development strategies

IS Managers and PC Software Buyers:

- MAKE THE RIGHT CHOICE by selecting the software that will continue to pay off for you
- GET THE MOST FOR YOUR MONEY by rating current and prospective software vendors
- STAY AHEAD by evaluating how future software trends will benefit you

(Revised from prior brochure)

Lotus, Ashton-Tate, Microsoft, WordPerfect, and more... are profiled in INPUT's *Personal Computer Software Market, 1989-1994* report

Information that's CRUCIAL for Software

" INPUT's *Personal Computer Software Market, 1989-1994* is based on primary research. The report provides you with the information you need most to succeed in the 1990s. "

Personal Computer Software Market, 1989-1994
Market Size and Forecasts
• Overall Market 1989-1994 • Systems Software by Sub-Delivery Mode • Applications Software • Largest Markets • Growth • Top Vendors—Market Coverage • Market Forces • Market Opportunities • Processing Services/Professional Services Companies
Issues and Trends
• Overall Issues—User & Vendor Trends • Funding Sources • New Applications and Improvements • Total Solutions / Bundled Marketing • Entry of Service Companies into the Software Market • Impact of Large Computer Systems Vendors on the PC Market • Software VARs—Alternative Marketing Approaches • Open Systems Architectures • Standards • New Technologies • Networking Solutions
Competitive Environment
• Competitive Strategies • Characteristics/Functionality of Successful PC Software Products • Software Company Profiles
Recommendations & Conclusions

Hardware saturation, controversies over standards and operating systems, new competitors (such as nontraditional software vendors), and an increasingly sophisticated user base present formidable challenges for software vendors. The stakes are just as high for personal computer managers and buyers who need a successful software solution that works into the next decade.

Both vendors and users need the right answer now to these urgent questions.

WHAT'S THE MAJOR TREND IN SOFTWARE DEVELOPMENT?

More-powerful software for standalone systems? Networking PCs with mainframes? Operating system standardization? Networkable solutions for PCs? Validating, assessing, and evaluating current strategies against future trends will optimize your profit and opportunities in the 1990s.

WHAT INGREDIENTS MAKE A SUCCESSFUL SOFTWARE PACKAGE?

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Success in the 1990s

WHAT DO USERS REALLY WANT?

INPUT interviewed users to determine what they really want from their software vendors. Major personal computer software buyers rated their needs in order of importance. Needs included transportability, software characteristics, ease of use, vendor reputation, and IBM compatibility. INPUT's *Personal Computer Software Market, 1989-1994* reveals which of these requirements is really the most important.

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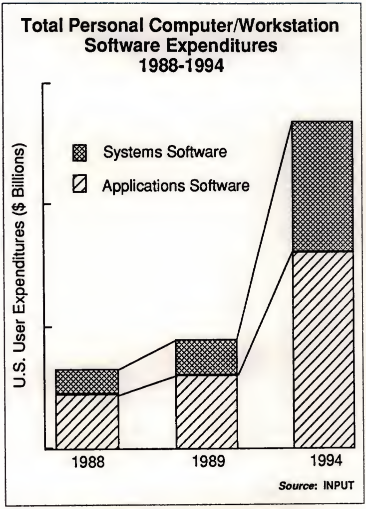

Base your development strategy on the actual size of your potential market, as determined by INPUT's market intelligence and in-depth vendor and user interviews.

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

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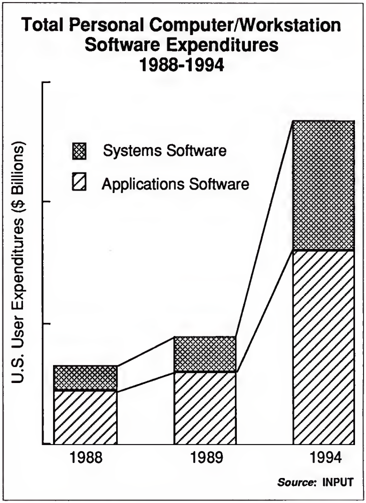

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The personal computer software products market has been for several years the fastest growing segment of the U.S. Information Services Industry. INPUT's forecast for the next five years calls for this dynamic market to retain its momentum, despite a number of dampening influences.

The just-completed, *Personal Computer Software Market, 1989-1994* report, focuses on the reasons behind this growth, identifies product characteristics and support services required by users, describes vendors' support and product strategies and discusses the implications and opportunities for vendors of software products.

To receive your copy of this pivotal report, please mail or fax the enclosed order form, or call INPUT at (415) 961-3300.

Best regards,

Robert Goodwin

Robert L. Goodwin
Vice President

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Robert Goodwin

Robert L. Goodwin
Vice President

PERSONAL COMPUTER SOFTWARE REPORT, 1989 - 1994

Many studies and reports have been produced in recent months that examine the "hypothetical" personal computer user and his future requirements. In Personal Computer Software 1989 - 1994, INPUT places emphasis on the perceptions and real needs of the end users and emerging technologies based on vendor and users interviews. The report reviews and analyzes the issues, trends, and market forecasts of the personal computer software market in three areas: 1) System software, 2) cross-industry applications software, and 3).industry specific applications software.

The future direction of software markets is to networking solutions involving transparent sharing of software processing among PC/workstations, minicomputers, and mainframes. Many of the applications currently running on mainframes will be run on workstations under a distributed processing model. Minis and mainframes will be used increasingly for communications/database applications within the distributed model.

With the lowered cost of the personal computer and its availability to the individual in the work environment and at home for personal use, there is a need for software that will fulfill the needs of both of these types of use. Software to run the systems and the applications has become paramount to the success of the personal computer.

PERSONAL COMPUTER SOFTWARE REPORT, 1989 - 1994

Based on experience and leadership in projecting and forecasting the information services market,INPUT is producing the Personal Computer Software Report, 1989 - 1994 to explore and discuss the major forces driving the personal computer software market. Through interviews with personal computer users and software vendors, the study will:

Forecast the personal computer software market size and growth from 1989 to 1994.

Identify the drivers and inhibitors that will influence this market.

Examine the current installed configurations of personal computers and user plans for future installations.

Leading vendors in the personal computer software market are identified and examined in the report.

Vendor offerings and user requirements are identified and compared.

Vendor and user issues and concerns regarding personal computer software are identified and examined.

Vendor strategies in product and support areas as well as recommendations for the profile of a successful software product are discussed.

YOU SHOULD READ THIS REPORT IF YOU ARE:

A Software Vendor:

Participating in or considering entering the personal computer software market.

Responsible for personal computer software strategy development.

Responsible for personal computer software market development.

A Major Personal Computer User or Buyer:

Interested in gaining a better understanding of vendor personal computer software development plans.

Interested in examining potential personal computer software service and support offerings.

TOTAL PERSONAL COMPUTER / WORKSTATION SOFTWARE EXPENDITURES 1988-1994

Overall CAGR (1989-1994) = 25%

User Expenditures (the vertical measurement) in $ Billions

(bar chart)

segment	1988	1989	1994	CAGR (89-94)
Application S/W	4.6	6.1	17.7	24%
Systems S/W	2.1	2.9	9.9	28%
Total PC S/W	6.7	9.0	27.5	25%

Personal Computer Installed Configuration

two pie charts side-by-side showing the following pictures

1988

standalone	58%
linked to mainframe	23%
linked to other PCs	19%

1989

standalone	39%
linked to mainframe	25%
linked to other PCs	36%

PERSONAL COMPUTER SOFTWARE REPORT, 1989 - 1994

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[illegible]

FROM: Joanne Ponnwitz

DATE: 11-16-89

PAGES: 1 of 5

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COMMENTS:

Sheila:

Here are Tom's comments/corrections to the brochure. It looks good, That's the benefit of having a Marketing person write the brochure, rather than a research person.

Joanne

EDS · GM · McDonnell Douglas
CSI · and more... profiled in
INPUT'S (Name) report

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Prepare your strategy today for software success ~~in the '90s~~ tomorrow

Personal Computer Software ~~Report~~ Market, 1989-1994

Current & prospective

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ADD

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PC software

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*such as not traditional SW vendor;

italics

Information that's CRUCIAL for Software

(is based on primary research. This provides you with the strategic

INPUT's Personal Computer Software Report ~~gives you the~~ information you need most to succeed in the 1990's. ~~Developers who back the wrong strategy may not survive the rapidly changing market of the 1990's. MIS Managers and buyers who choose today's software without understanding tomorrow's needs risk significant losses to more knowledgeable competitors.~~

Hardware saturation; controversies over standards and operating systems; new competitors,* and an increasingly sophisticated user base present formidable challenges for software vendors. The stakes are just as high for personal computer managers and buyers who need a successful software solution that works into the next decade.

Both vendors and users need the right answer now to these urgent questions.

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More powerful software for stand-alone systems? Networking PC's with mainframes? Operating system standardization? Networkable solutions for PC's? ~~The right answers can set your marketing and R & D development strategies on the path to success in the 1990's. Development based on inaccurate assumptions about market trends can result in costly detours that could have catastrophic consequences for you and your company.~~ 1

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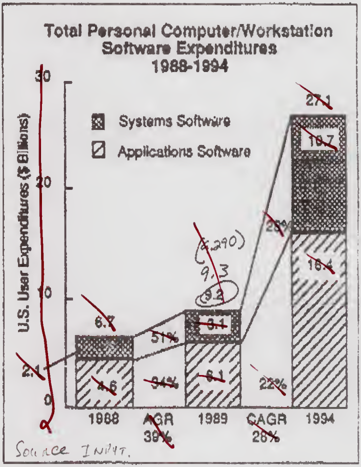

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