



many voices
one mozilla

Thunderbird Individuals Survey

Nov 2011

For JB Piacentino

Objectives

- Mozilla felt that it didn't have a good picture of its Thunderbird installed base. This survey is trying to answer questions like:
 - who are the Thunderbird users,
 - what is their equipment,
 - what do they like about TB,
 - which features do they expect –or not, in the future

End user survey Methodology

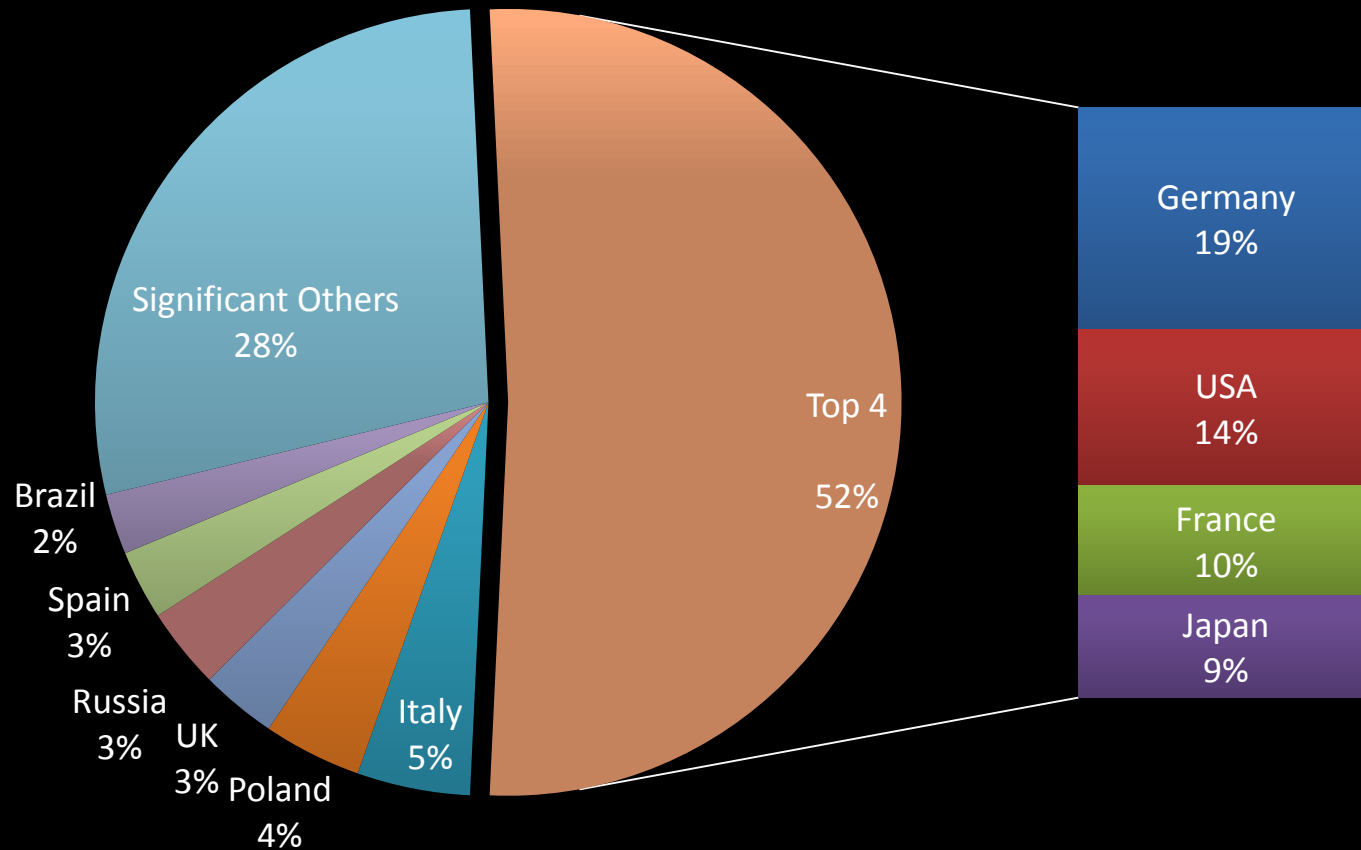
- From Oct. 20 to Nov. 15, 2011
- Target: the 4 TB largest markets
- Survey in 4 languages (English, French, German, and Japanese) accessible from TB start page
- 500 answers per language (Japan has a little more with 834 answers)
 - G-F-J: answers from respective countries
 - E: mix of US+CA and UK (80/20)
- E-F-G results are pretty consistent. Japan has a slightly different profile on few points (detailed in the respective slides)
- The survey allowed for free text answers. They have been analyzed for E-F-G. We're still missing the Japanese translation.

Key findings

- More than 70% TB users are male.
- Large % of users are 35+ y/o with a high percentage of 65+ in the US
- TB users are loyal to TB and to FF (to Mozilla by extension): most TB users who have more than 1 PC use TB on most of them (70%) and 70%+ use FF
- TB users are loyal overtime: almost 50% of the base is using TB for more than 2 years.
- To “Where did you hear about TB for the first time?” The highest score is “recommendation from a friend” (highest scores in F-G). Importance of Word of Mouth
- 35%+ are using TB in a professional environment
- Our installed base (particularly in EFG) is broadly using IM and/or social networks (70%)
- Most required features are calendar, uploading address book from existing email accounts, anti-virus compatibility, archiving and cloud access (i.e FF synch)
- Many other required features can be addressed ...as these features exist. There is obviously a problem of users information to be solved (discoverability program to be implemented)
- When prompted about “perfect messaging in the future”, only 1/3 have answered the open field question and almost 1/3 of those answers is “I don’t know”. Users have hard time figuring out what it means to have IM and Email together.

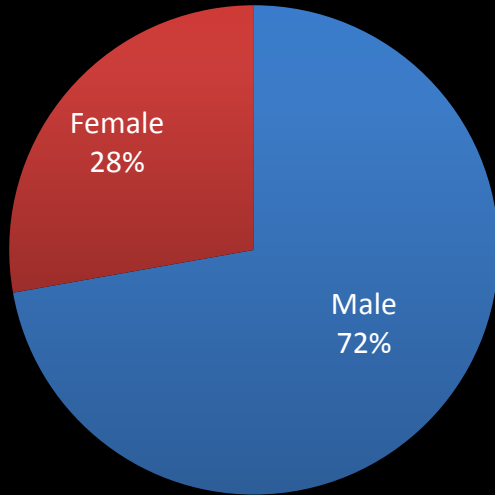
Background information

TB installed base



7.8m Active Daily Users ~ 20M users
(Nov. 11)

Demographics

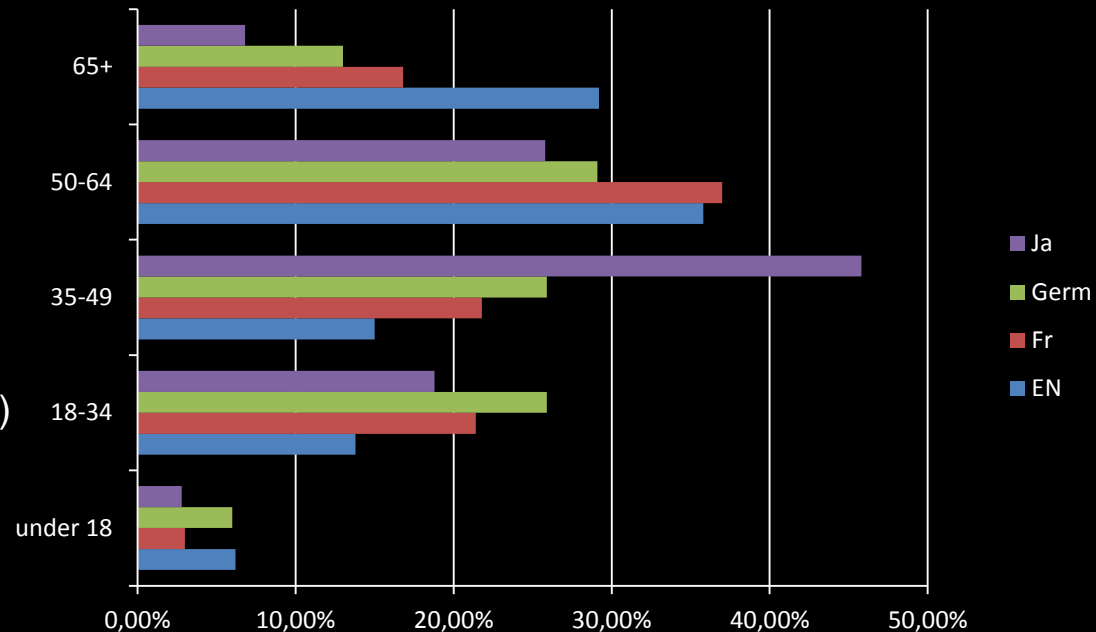


Gender

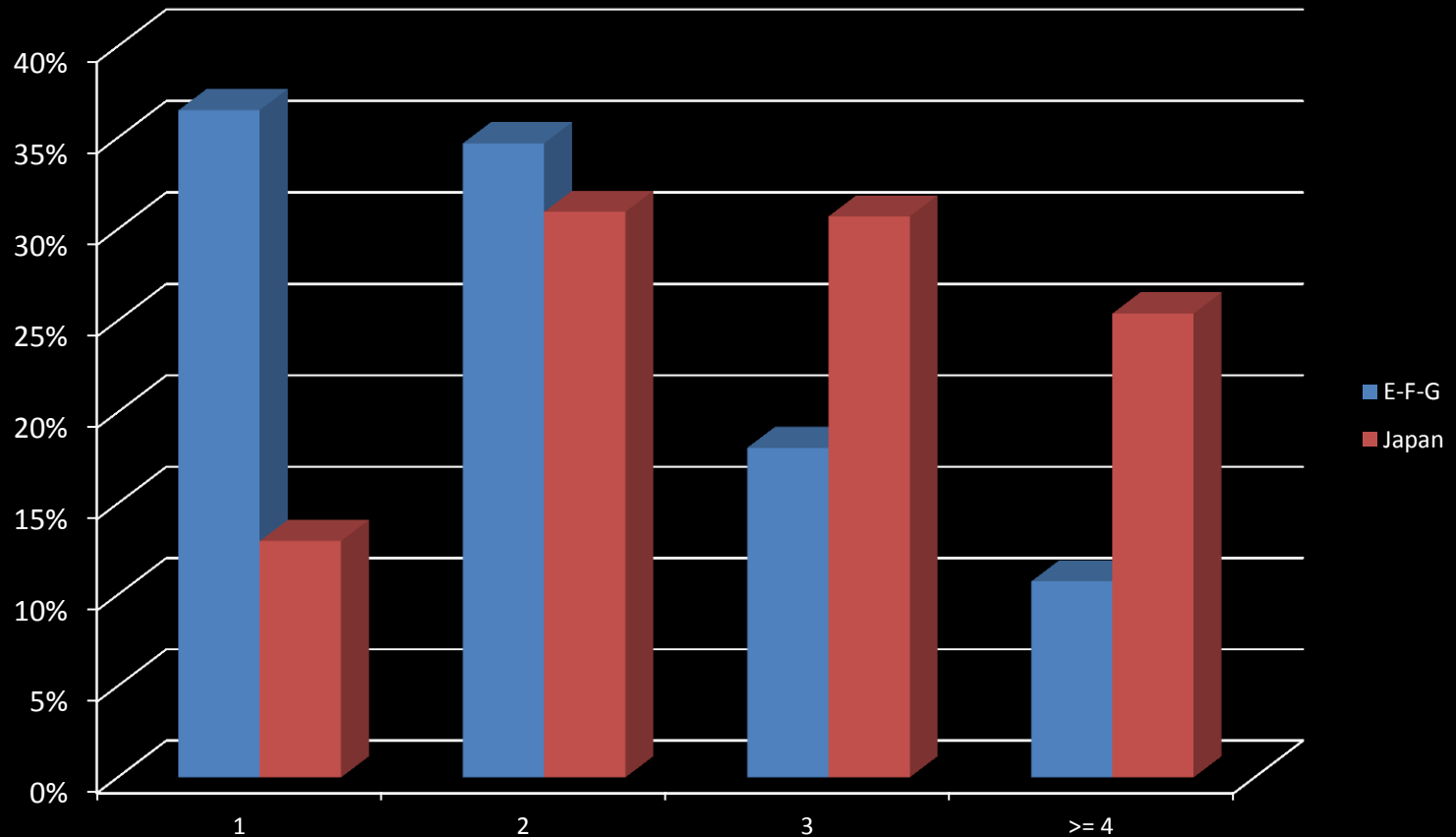
- Consistent across E-F-G
- Slightly more male in J (86%/14%)

Age

- Users slightly older in E (ca. 30% in 65+)
- 35-49 dominant in Ja
- G is relatively younger than any other geography

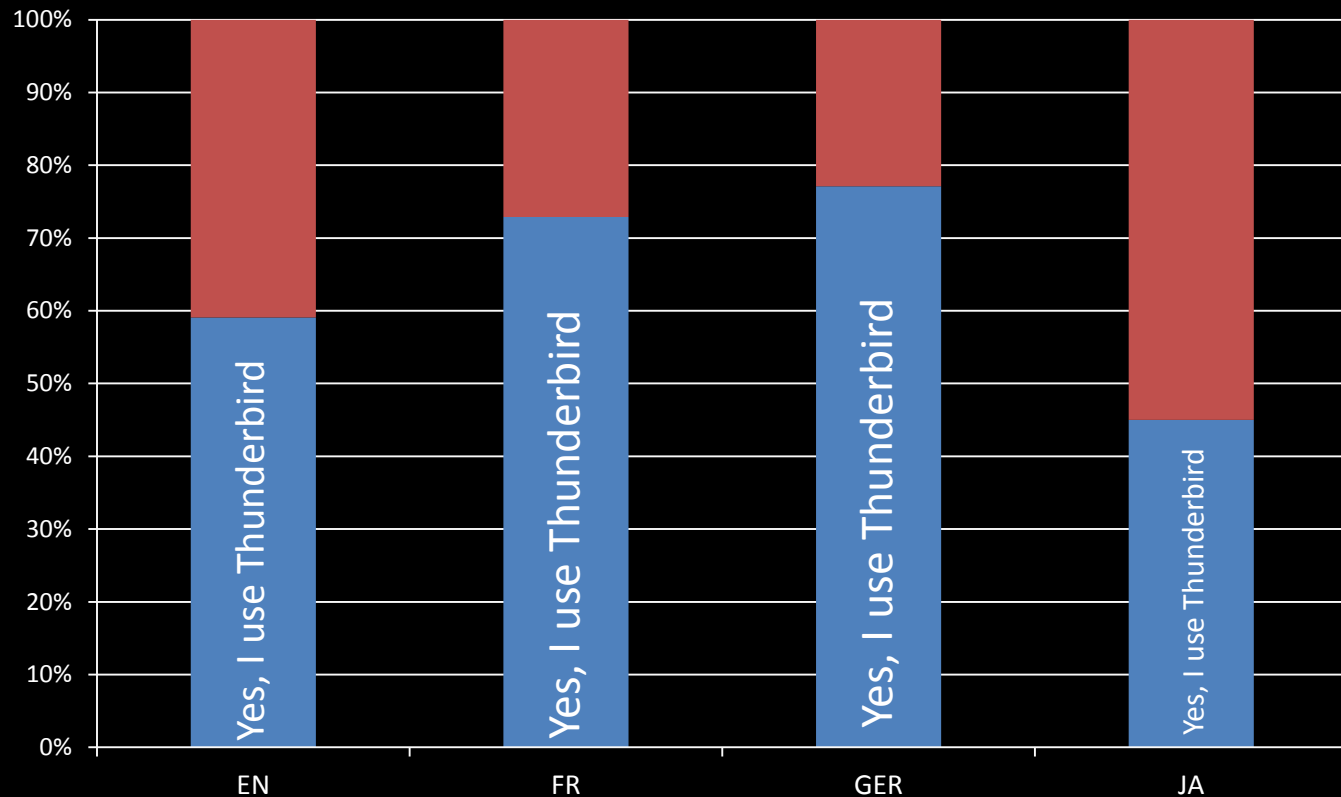


How many computers do you use?



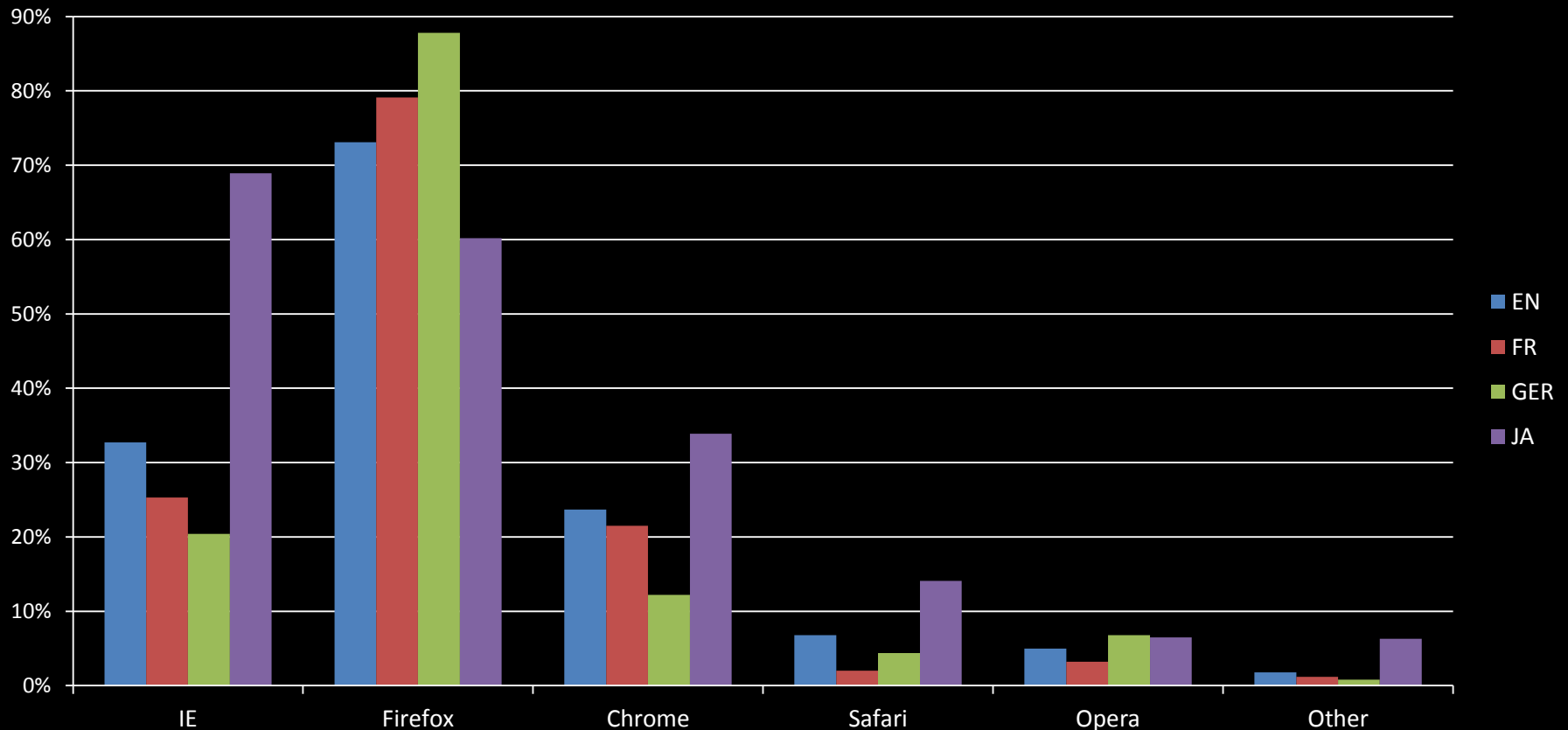
E-F-G: 63% users have more than 1 computer,
Japan: 87% who have more than 1 computer

If you use more than one computer, do you use Thunderbird on all or most of them?



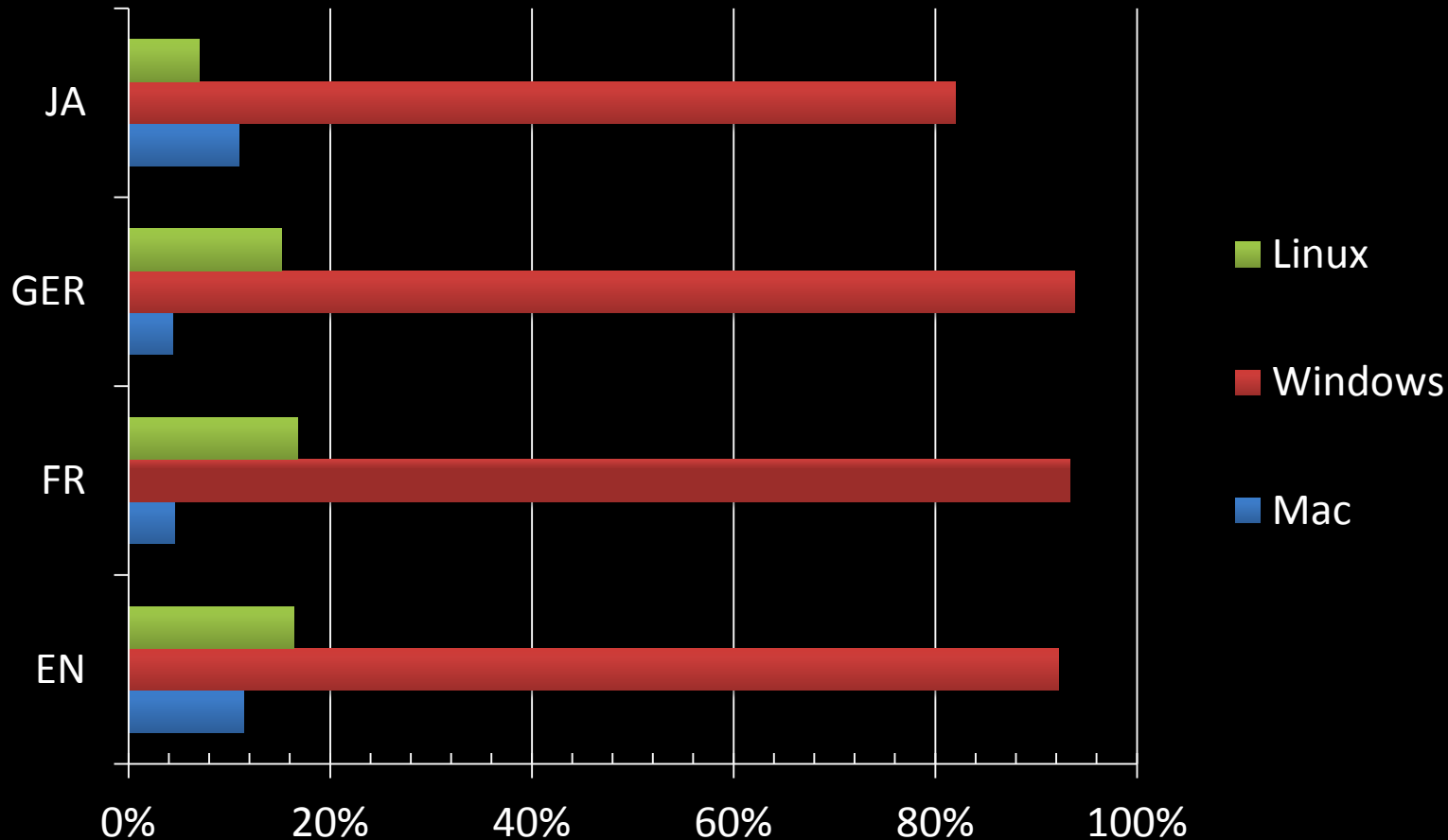
- Broad majority of TB users use it on most of their PCs, with a stronger penetration rate in F-G.
- Japan rate is the weakest (45%)

Which web browser do you use?



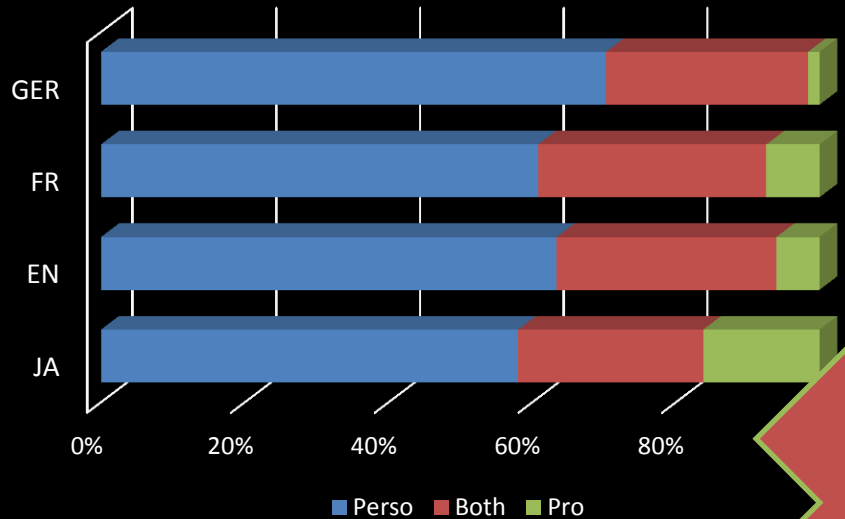
- Firefox is the dominant browser amongst Thunderbird users (G=87.8%, F=79.1%, E=73.1%)
- In Japan, more than 50% users have 2 browsers, and 20% have more than 3.
- IE is dominant in Japan

What Operating System do you use?



E-J have the highest MacOS penetration (in sync with the PC market in those 2 geos.)

TB usage: personal, professional, or both?

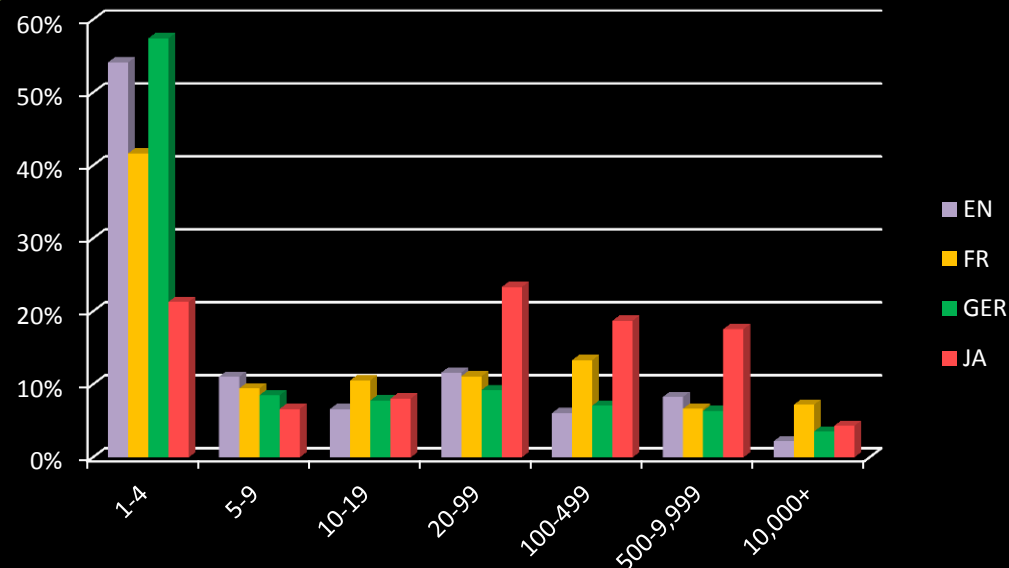


- Japan has the highest rate of mixed usage. It might explain the multiple PCs findings
- Germany has the highest home penetration

99% of respondents have last TB version, which means they are probably answering from their home PC.

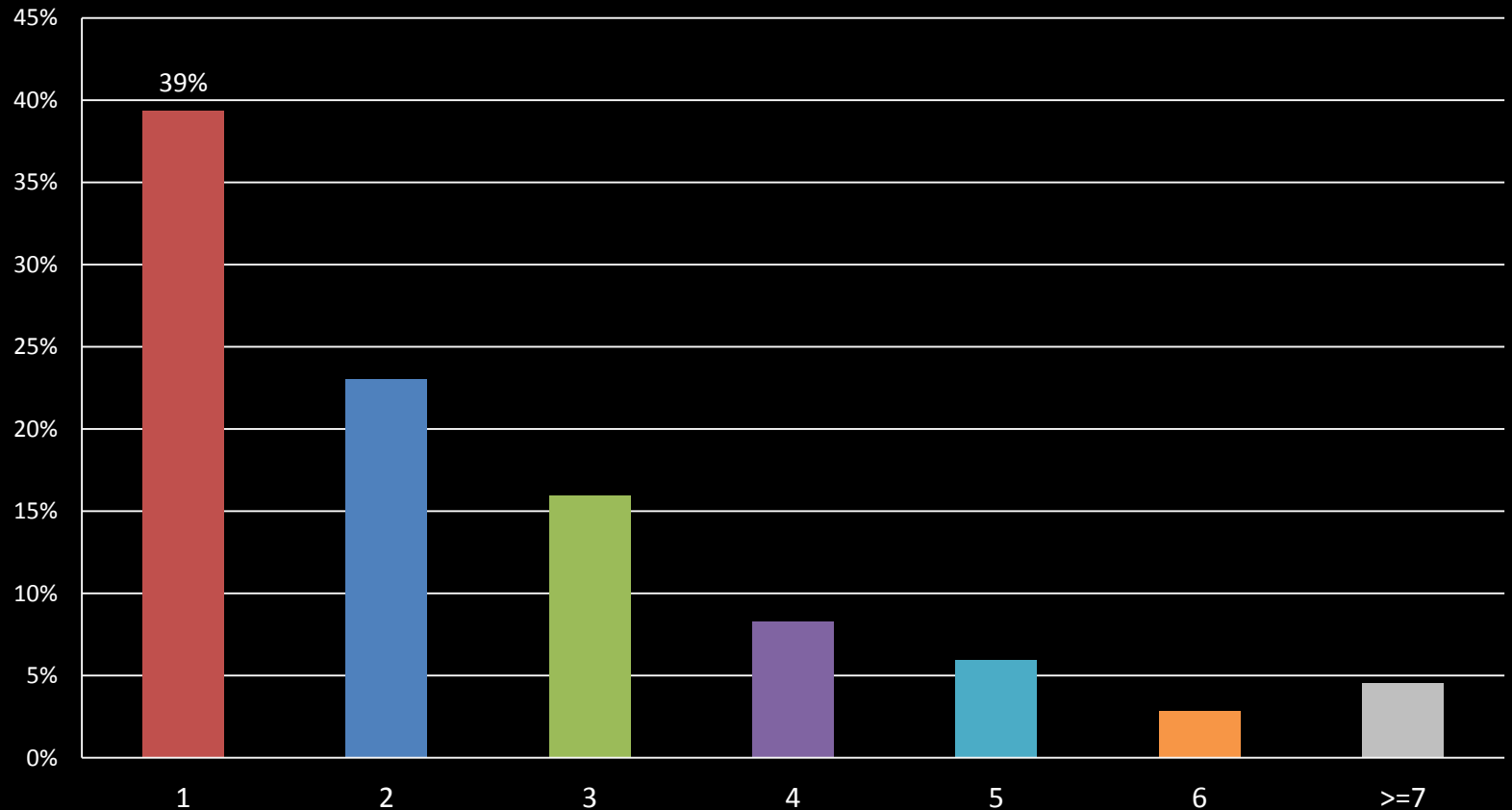
If Professional users or Both: what's the size of your organization?

- Japan shows a higher penetration in medium size organization



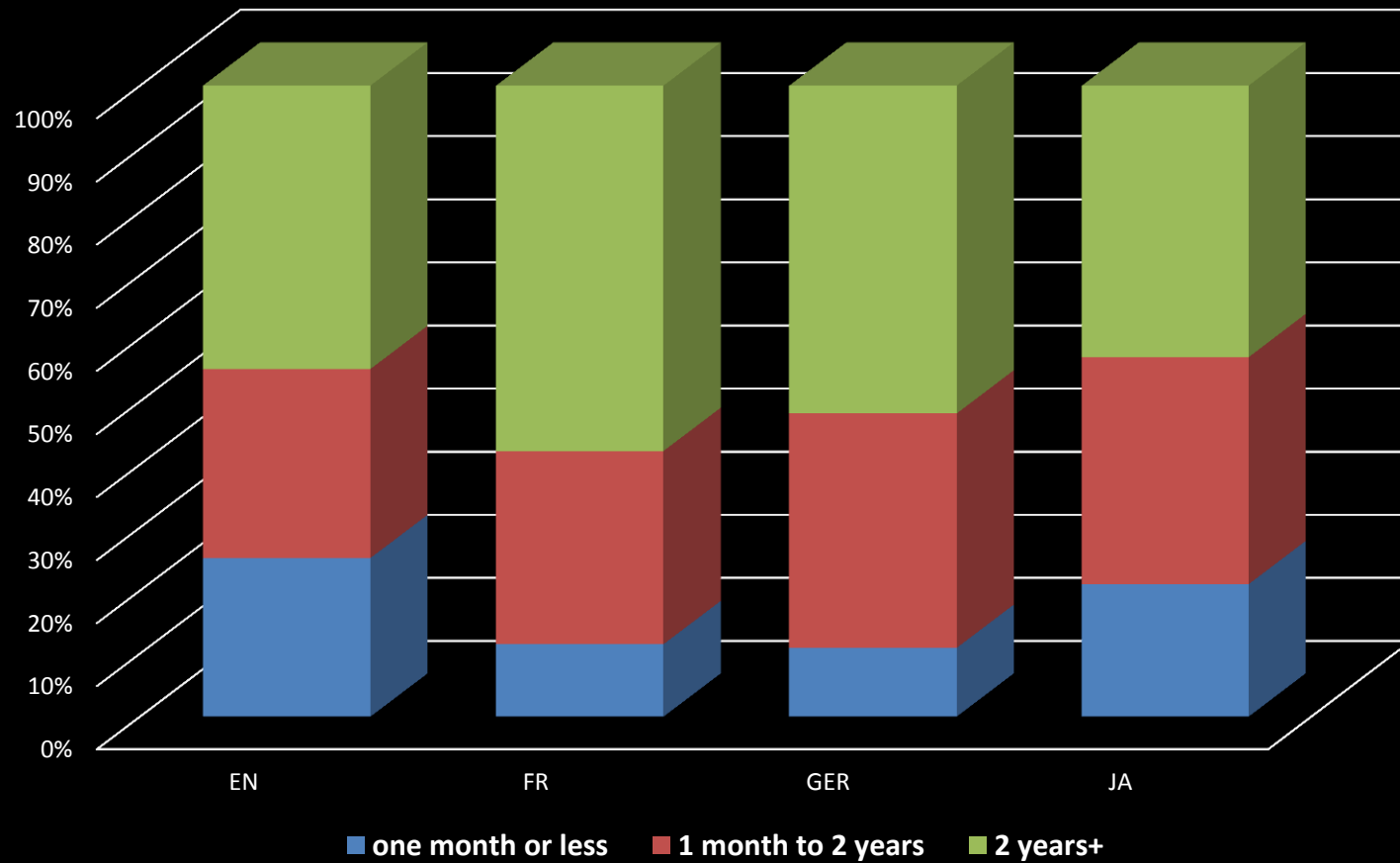
How many email account(s) do you manage with Thunderbird?

All 4



All 4 geos: 61% users have 2+ email accounts.

How long have you been using TB for?

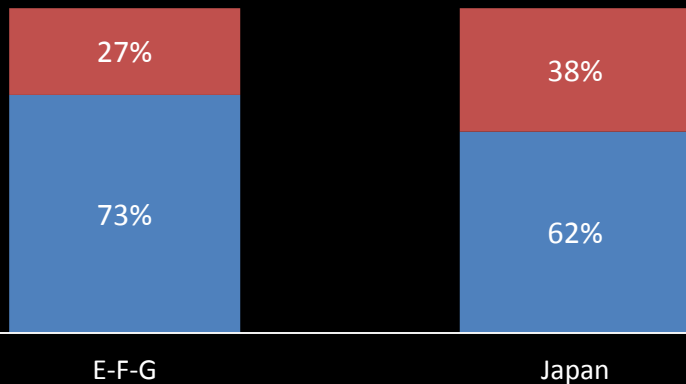


TB has a loyal base.

IM and Social Networks penetration

IM

■ user ■ non user



Instant messenger usage in North America and Europe: 68% are IM users / 32% are non users (OPSWAT June 2011)

Our installed base has a slightly higher IM penetration with 73% in EFG

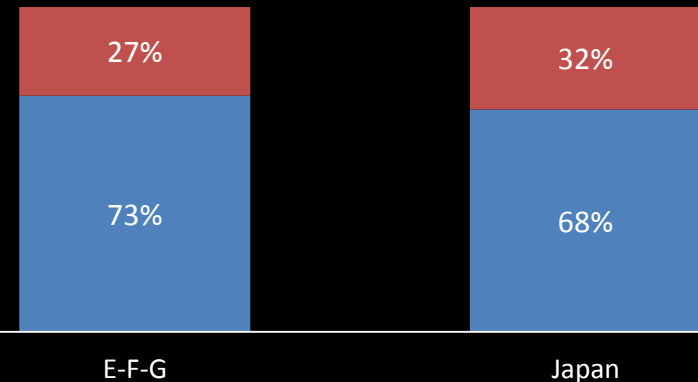
Both IM and SNs penetration rate are higher in EFG than in Japan.

Forrester 2010: 68% of online Europeans now use social media each month.. Our rate is slightly better.

-See slide 27f or more details about SNs usage per geo

Social Networks

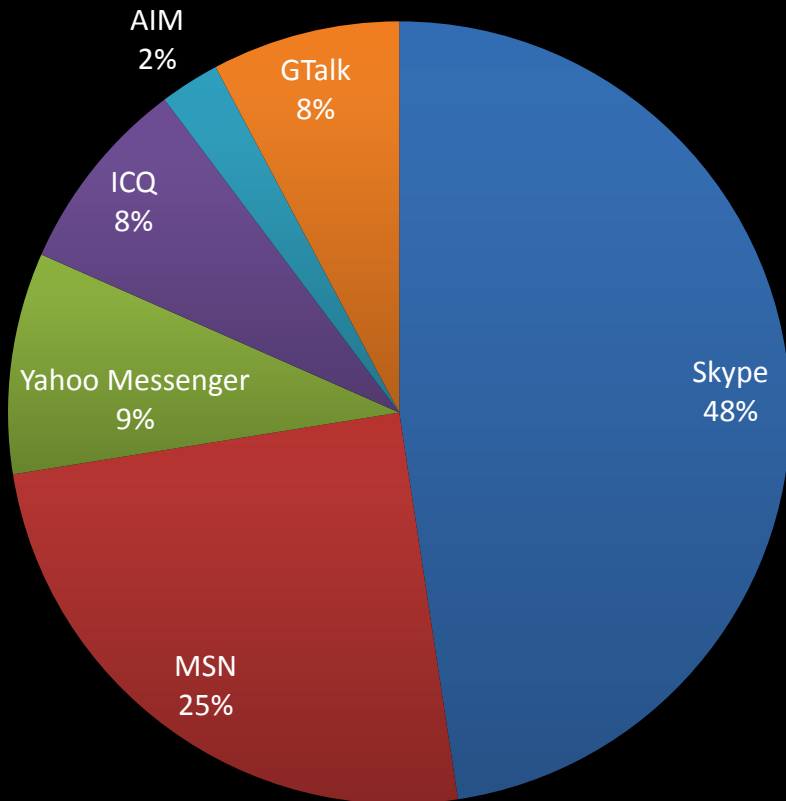
■ user ■ non user



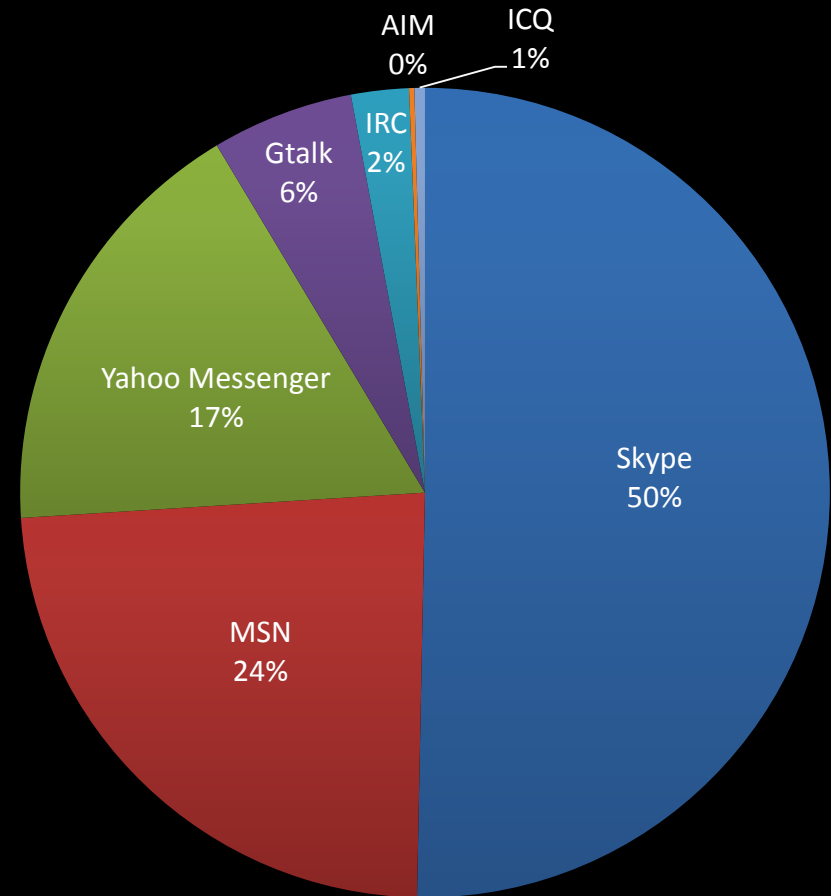
Instant Messaging

do you use one or more of these services ?

E-F-G



Japan

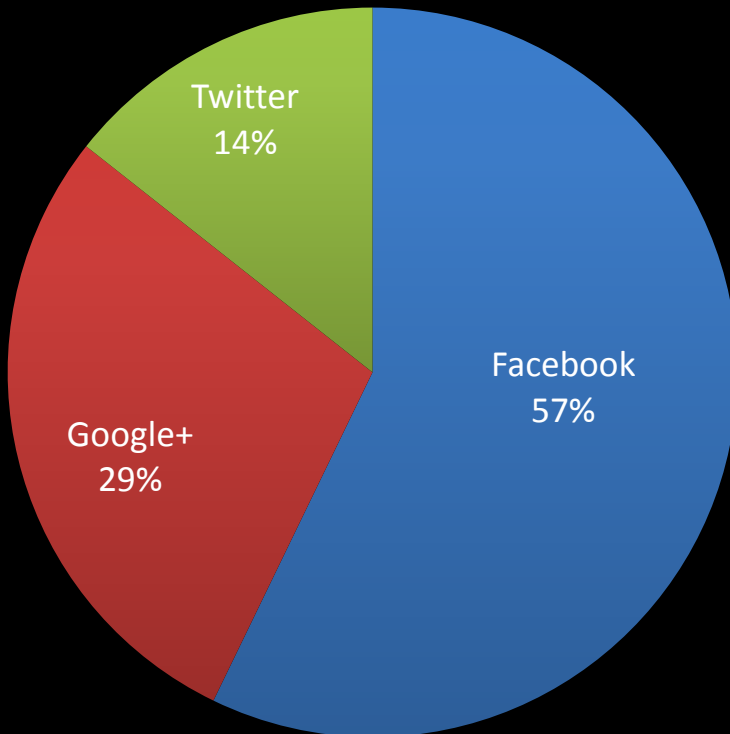


Skype is dominant in all geographies and MS (Skype + MSN) has 75% total market share
The Skype penetration rate amongst TB users is higher than expected. See more data in the comment section below

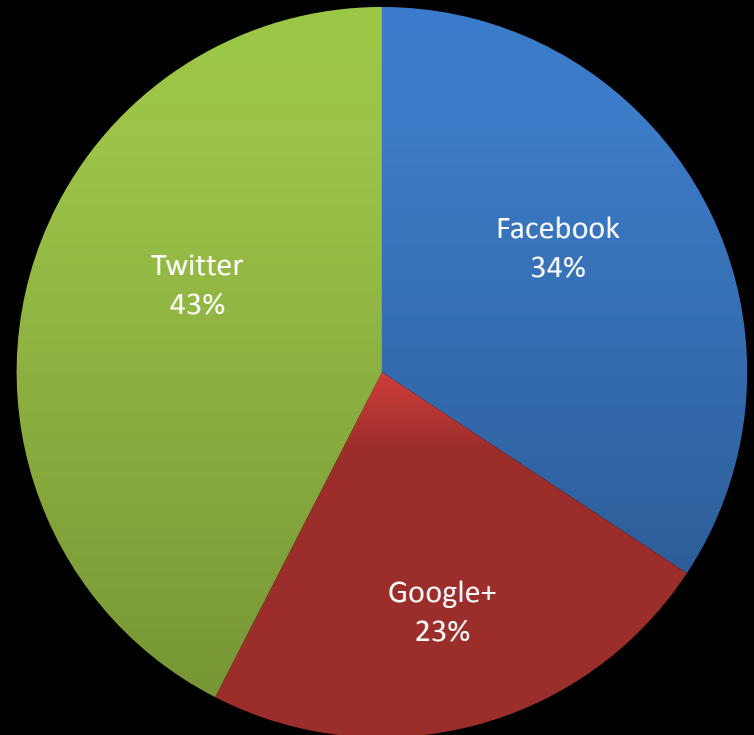
Social Networks

Do you use one or more of these services ?

E – F – G



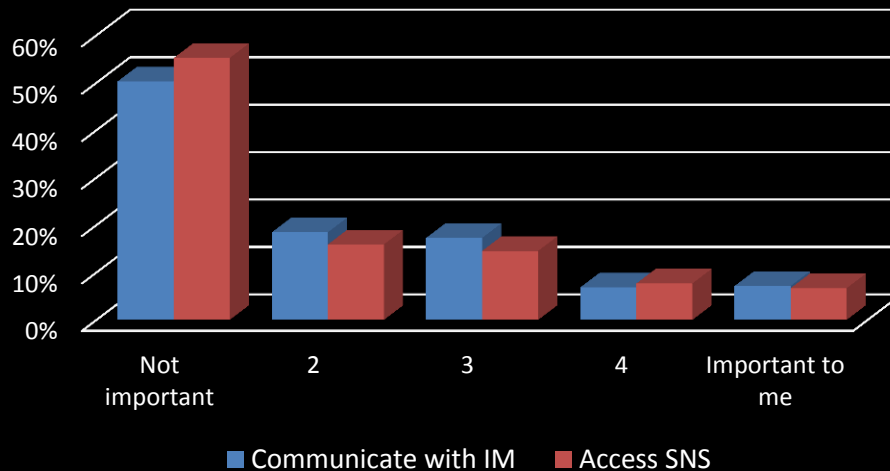
Japan



Twitter is 30% more popular in Japan than in E-F-G .
As a consequence, Facebook penetration is 20 points lower in Japan than in EFG.

Amongst IM and SNS users only, how much do you want this feature in TB?

E-F-G



- Japan is more moderate on its answers than EFG where the “Not important” is really strong (50%+).

Possible analysis:

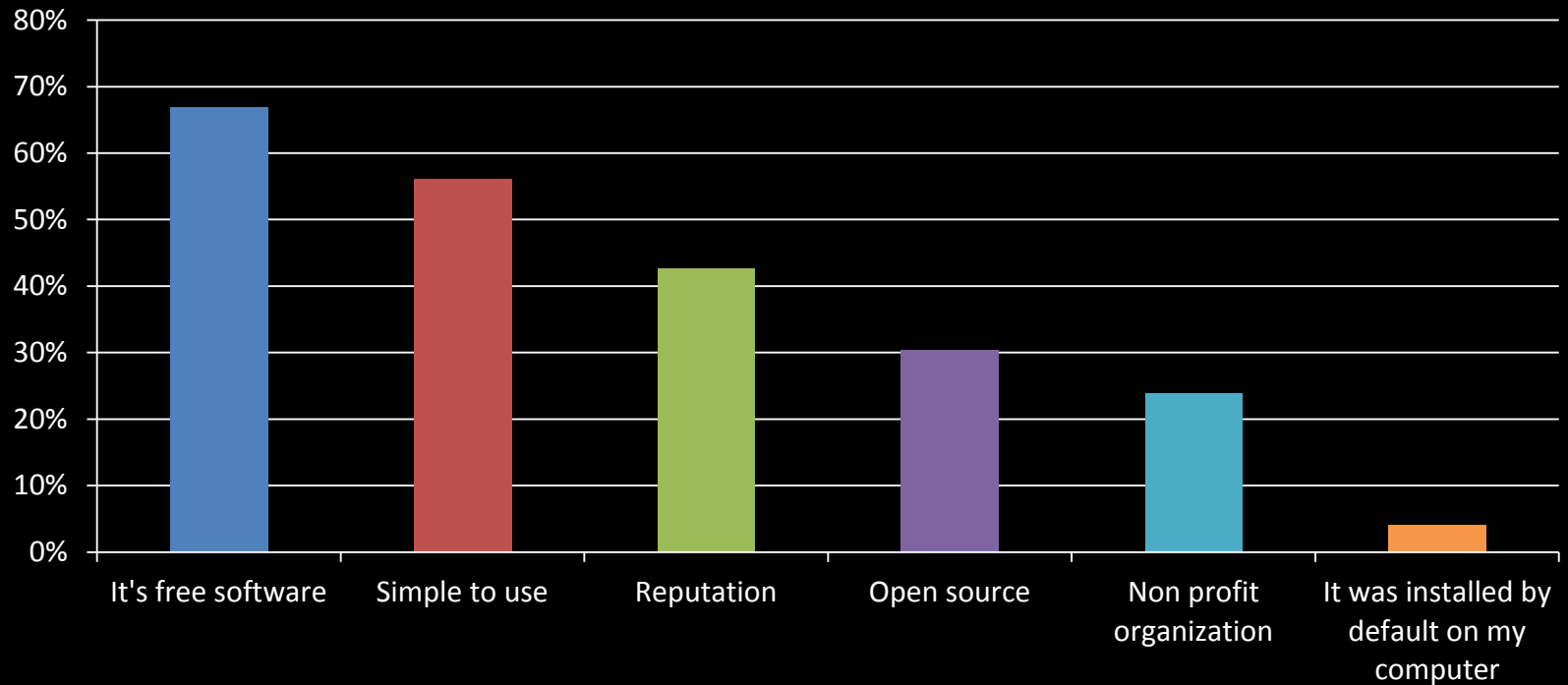
Most people have hard time figuring out what it means to have IM and/or SNS within email client

Japan



Why did you choose TB?*

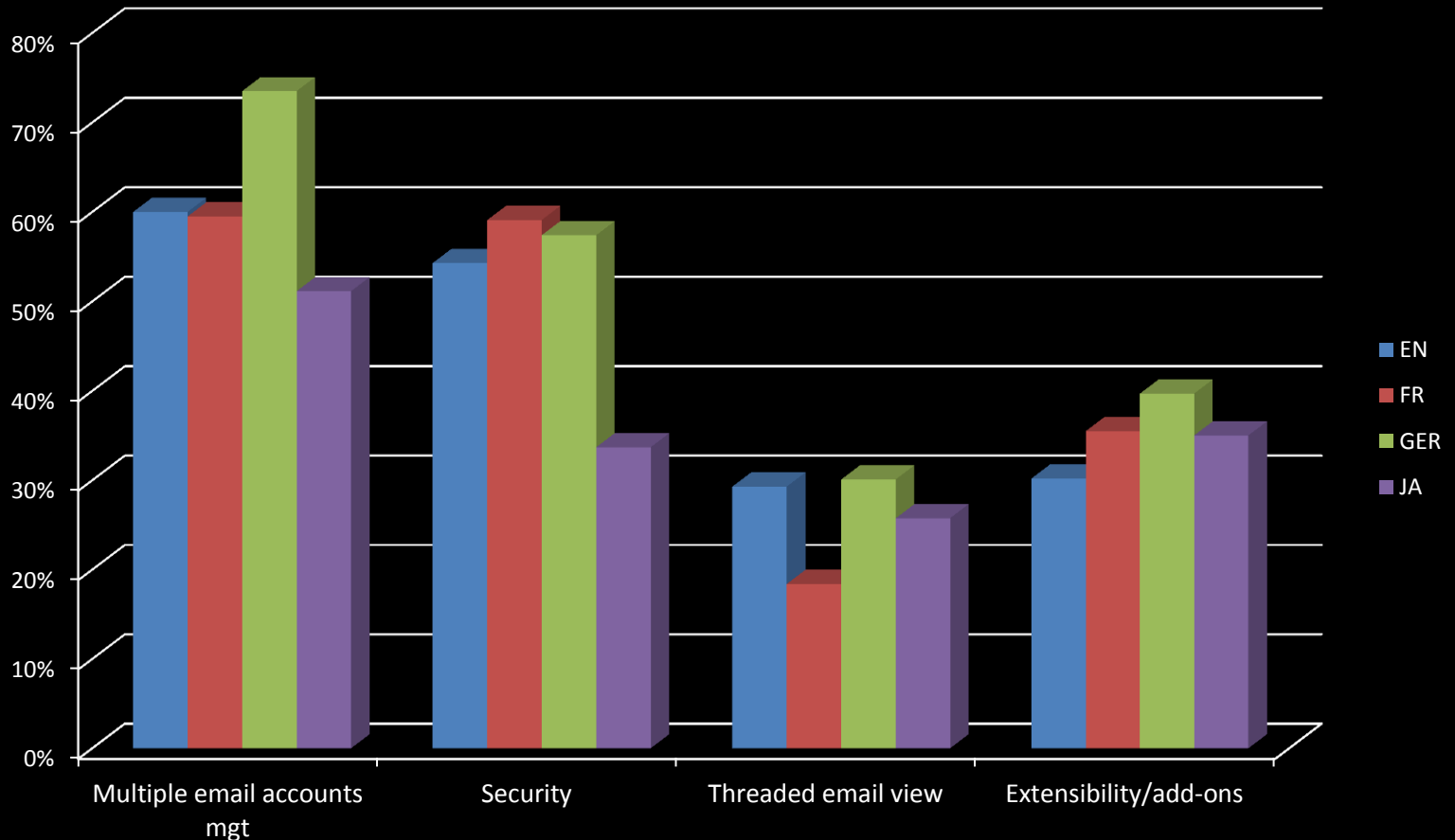
All 4 geos



Free = not paid for

*Multiple choices possible

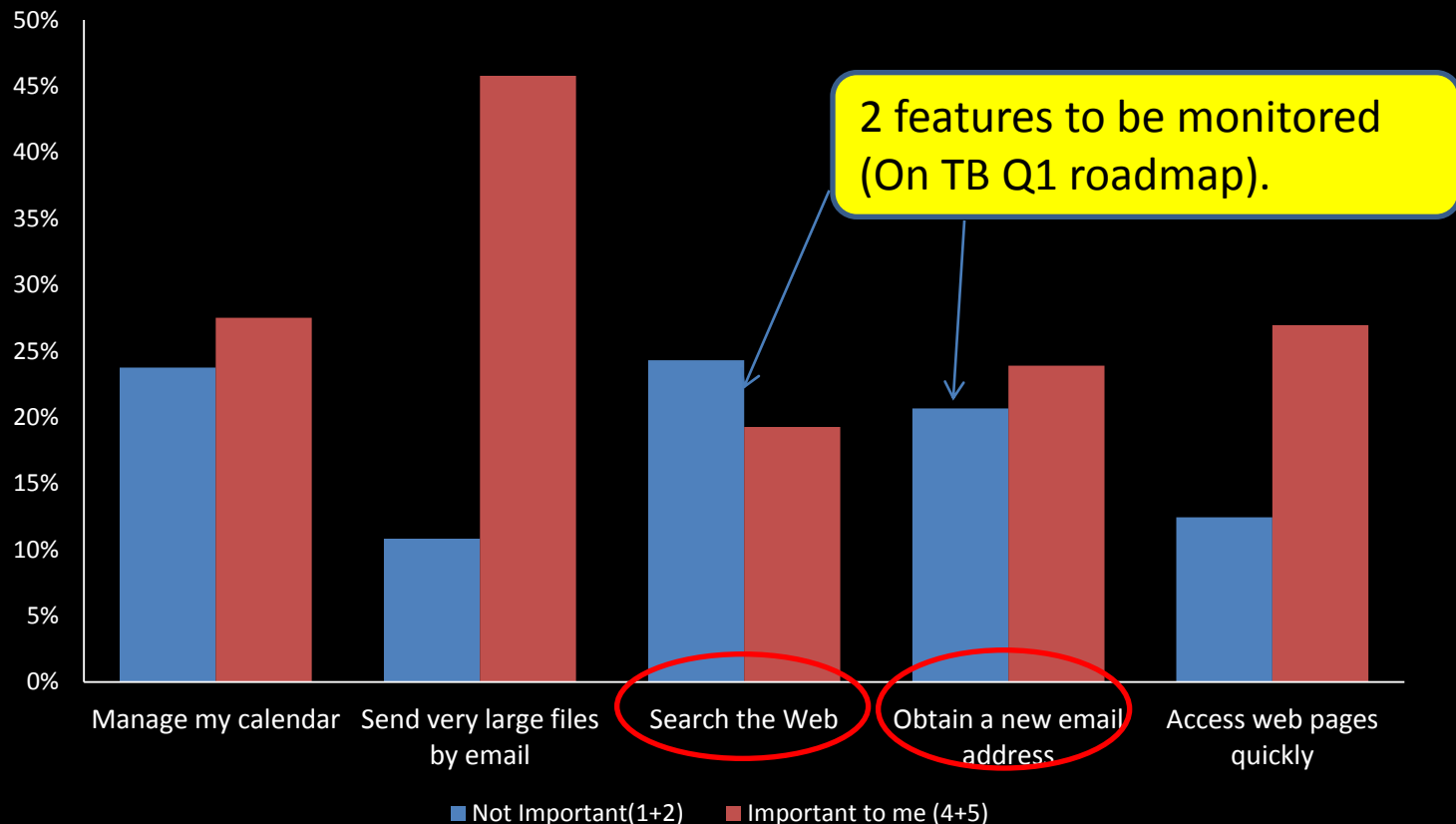
What features* do you like in TB?



Multiple email management and security are the big winners. Add-ons is 30%+ in 3 geographies

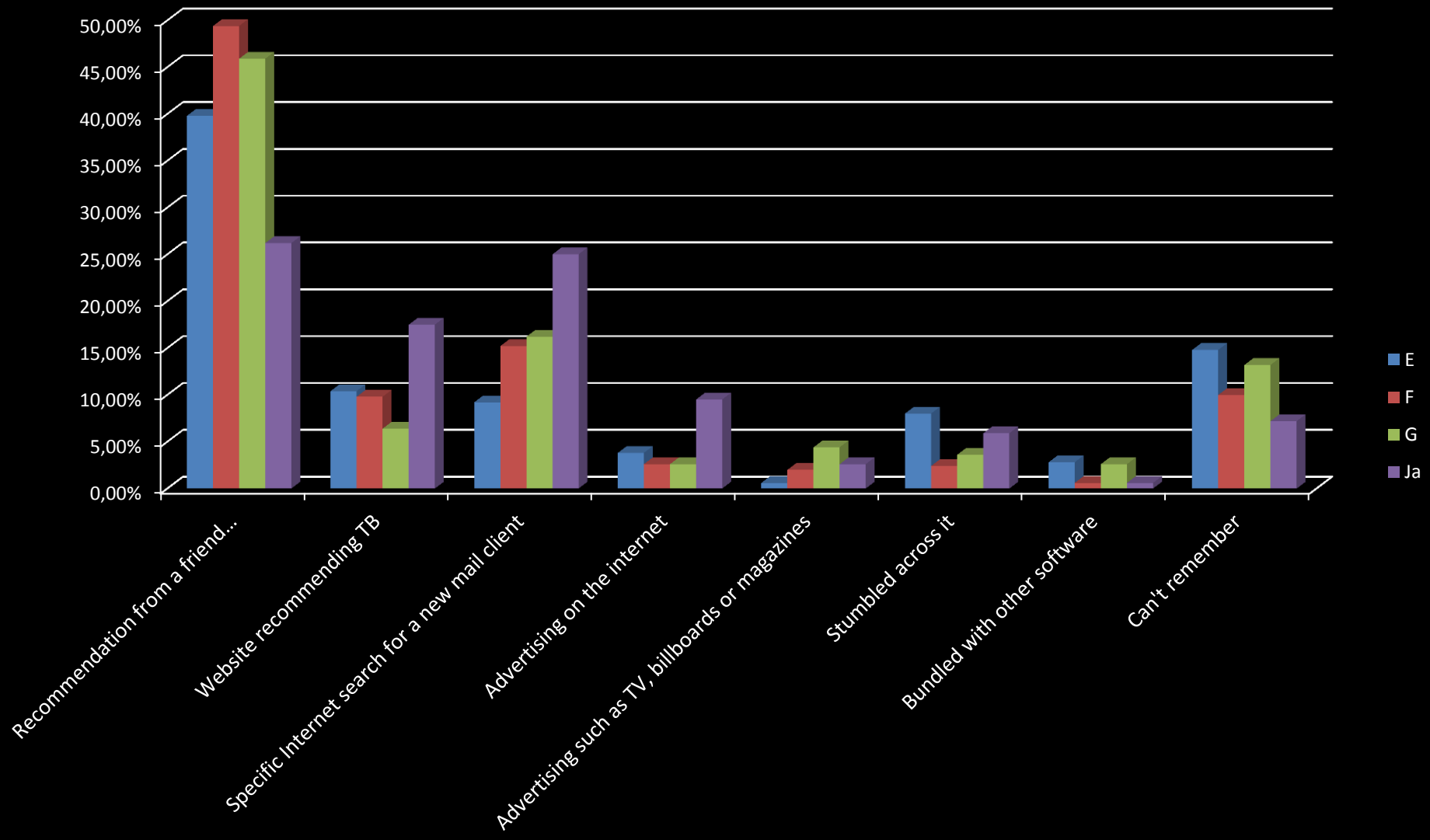
*Multiple choices possible

How much do you want the following features in TB

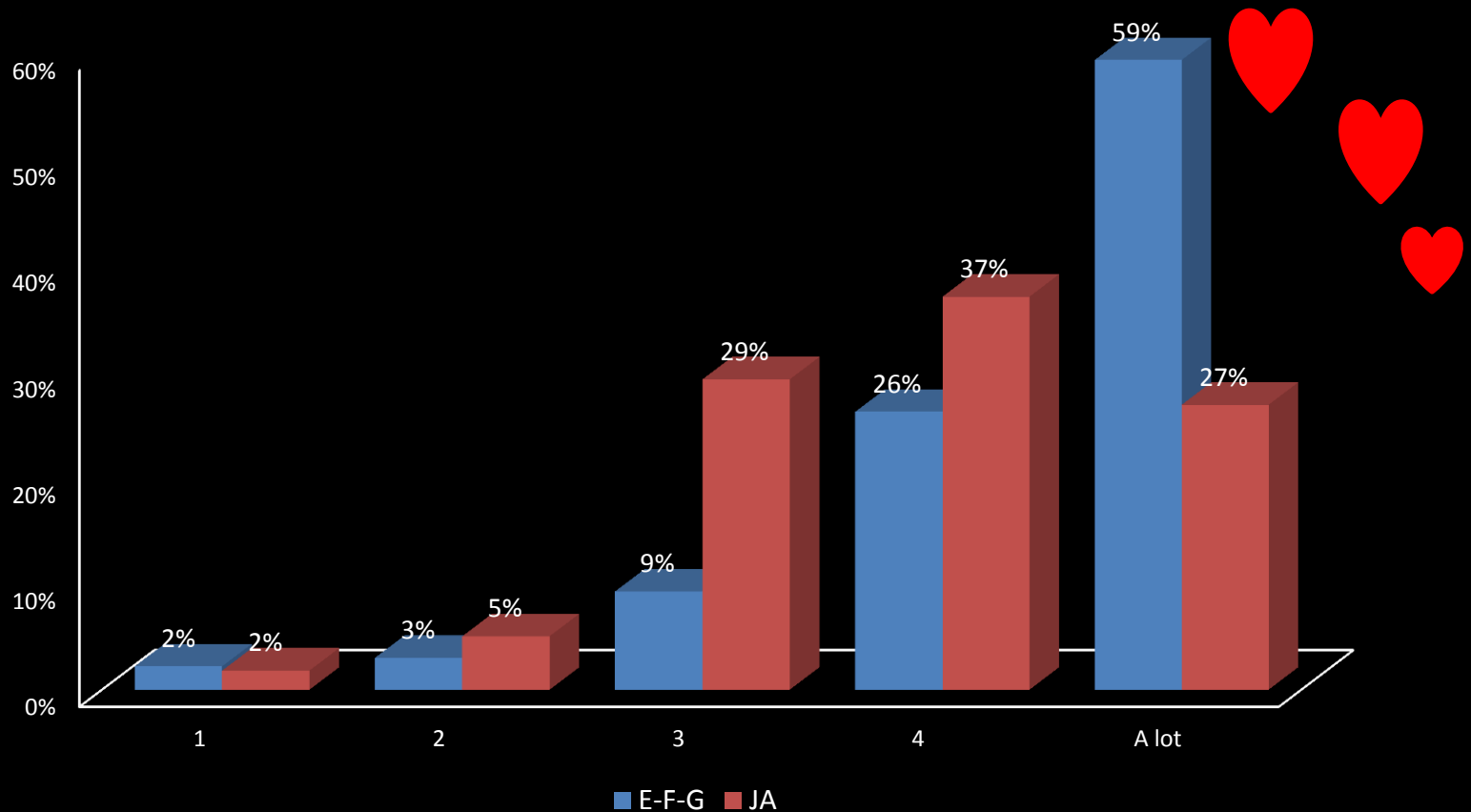


E-F-G: In the open text field, the majority of requests were for Calendar (Google and Lightning), Address book upload, antivirus scan, cloud access (see FF synch), sticky notes, archiving...

Where did you hear about TB for the first time?



Would you recommend Thunderbird to a friend/family/colleague?



Again Japan is more moderate with its answers. 3 rating is stronger than in EFG

Merci.

- Contact abourcier@mozilla.com for questions