

Google Chrome on the way up in Europe

Google Chrome holds on to its 3rd place in the browser market with a gain of 7.1 points in one year to reach 12.8% in April 2011

Survey published on the 1st June 2011





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Study carried out from the 1st March to the 16th May 2011 within a cross section of 16,865 websites audited by AT Internet.

After a stable period in January 2011, Internet Explorer once again loses market share in Europe: more than 9 points over the last 12 month period. Safari and Google Chrome take advantage of the situation to strengthen their positions.





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■ Safari and Google Chrome in particular continue to gain ground on the leader, Internet Explorer and Mozilla/Firefox

The graph below shows traffic distribution by browser; it is an estimation of the average distribution of visits which were recorded on websites in Europe in the months of April 2010 and April 2011. The traffic distribution for 23 different countries was estimated (for further information on this please read the Methodology).

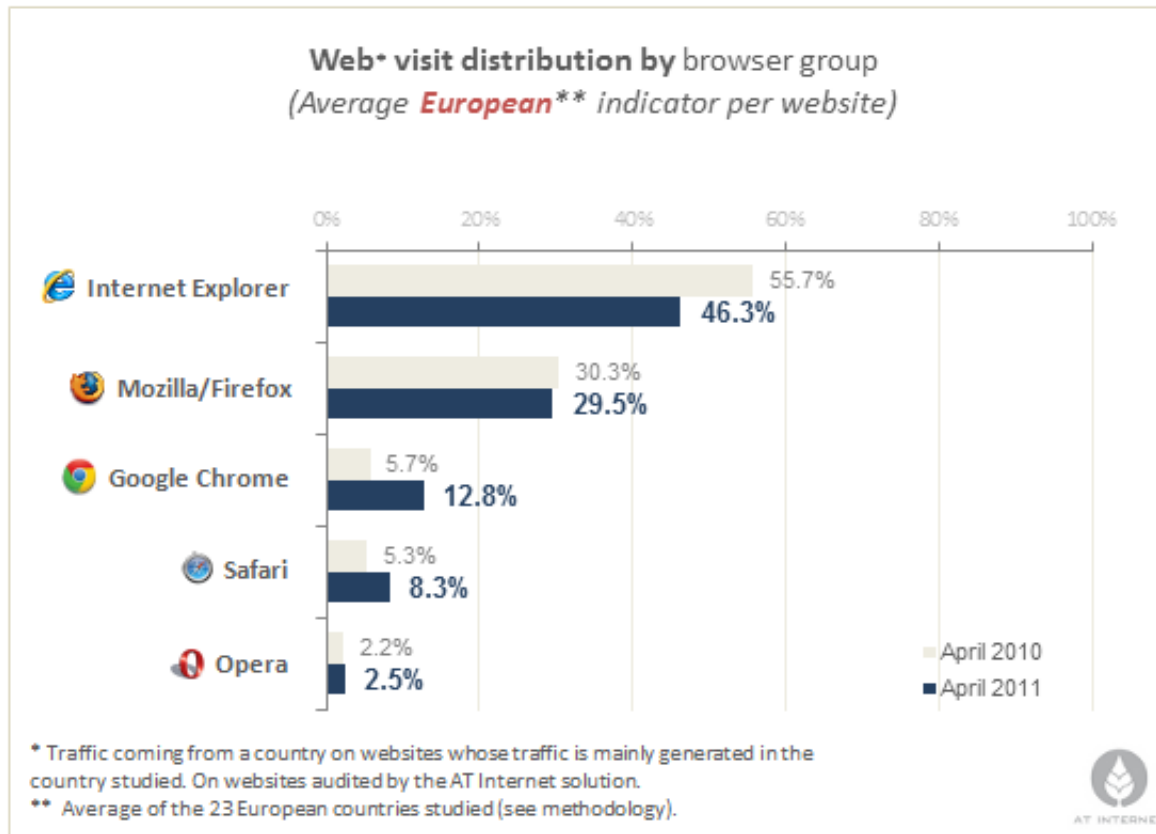
- **Over a one year period Internet Explorer's visit share decreased by more than 9 points in Europe**
 - In April 2011, on average **46.3%** of visits to a website in a European country were made through Internet Explorer compared to 55.7% in April 2010.
- **Its biggest challenger, Mozilla/Firefox, did not experience an upward trend and fell under 30% in terms of visit share**
 - The browser lost, on average, 0.8 points to generate **29.5%** of traffic from a European country in April 2011 (vs. 30.3% in April 2010).
- **Once again, Google Chrome and Safari gained market shares**
 - Google Chrome consolidated its 3rd place with a gain of 7.1 points in one year to reach **12.8%** in April 2011,
 - Safari, in 4th position, gained 3 points with a visit share of **8.3%** in April 2011.
- **Opera, still in 5th place, increased from 2.2% to 2.5% between April 2010 and April 2011**





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■ Google Chrome has gained more than 3 points in visit share since January

The following table shows traffic distribution by browser, an estimate of the average distribution recorded on websites in Europe over the last 6-month period.

- **After a stable period in January 2011, Internet Explorer has once again lost market share over the last 3 months**
 - The leader lost 4.5 points in 6 months with a marked decline of 1.6 points in April 2011 to the advantage of its competitors: 46.3% in April 2011 vs. 47.9% in March 2011.
- **Mozilla/Firefox lost 0.8 points between November 2010 and March 2011 for a slight regain in market share in April 2011**
 - 29.2% in March 2011 vs. 30% in November 2010,
 - Mozilla gained 0.3 points in April 2011 to reach the same visit share it had in January 2011 (29.5%), in other words a loss of half a point over the last 6 months.





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- **Google Chrome continued to grow each month with a 3.4 point gain over the last 6 months**
 - Taking advantage of its sales campaign, Google Chrome experienced the most significant increase of the top 5 browsers in Europe: **between a 0.5 and 1 point increase depending on the month** in question.
- **After a break at the beginning of the year, Safari regained market share in March and April 2011**
 - After an excellent month of December 2010, Safari slightly decreased in January and stagnated in February.
 - Safari regained market share in March and April with a 0.8 point gain over these 2 months.





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Web visit* distribution by browser (Average European** indicator per website)	November 2010	December 2010	January 2011	February 2011	March 2011	April 2011
 Internet Explorer	50.8%	49.2%	49.1%	48.8%	47.9%	46.3%
 Mozilla/Firefox	30.0%	29.8%	29.5%	29.3%	29.2%	29.5%
 Google Chrome	9.4%	10.4%	10.9%	11.4%	12.1%	12.8%
 Safari	6.9%	7.7%	7.4%	7.5%	7.8%	8.3%
 Opera	2.4%	2.4%	2.4%	2.4%	2.5%	2.5%
Other browsers	0.5%	0.6%	0.6%	0.6%	0.6%	0.6%

* Traffic coming from a country on websites whose traffic is mainly generated in the country studied. On websites audited by the AT Internet solution.

** Average of the 23 European countries studied (see methodology).



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- Two months after their respective releases, Firefox 4 generates almost three times more visits than Internet Explorer 9

The following graph shows average daily visit shares which were recorded on websites in Europe, from the 1st March to the 16th May 2011, for Internet Explorer 9 and Firefox 4.

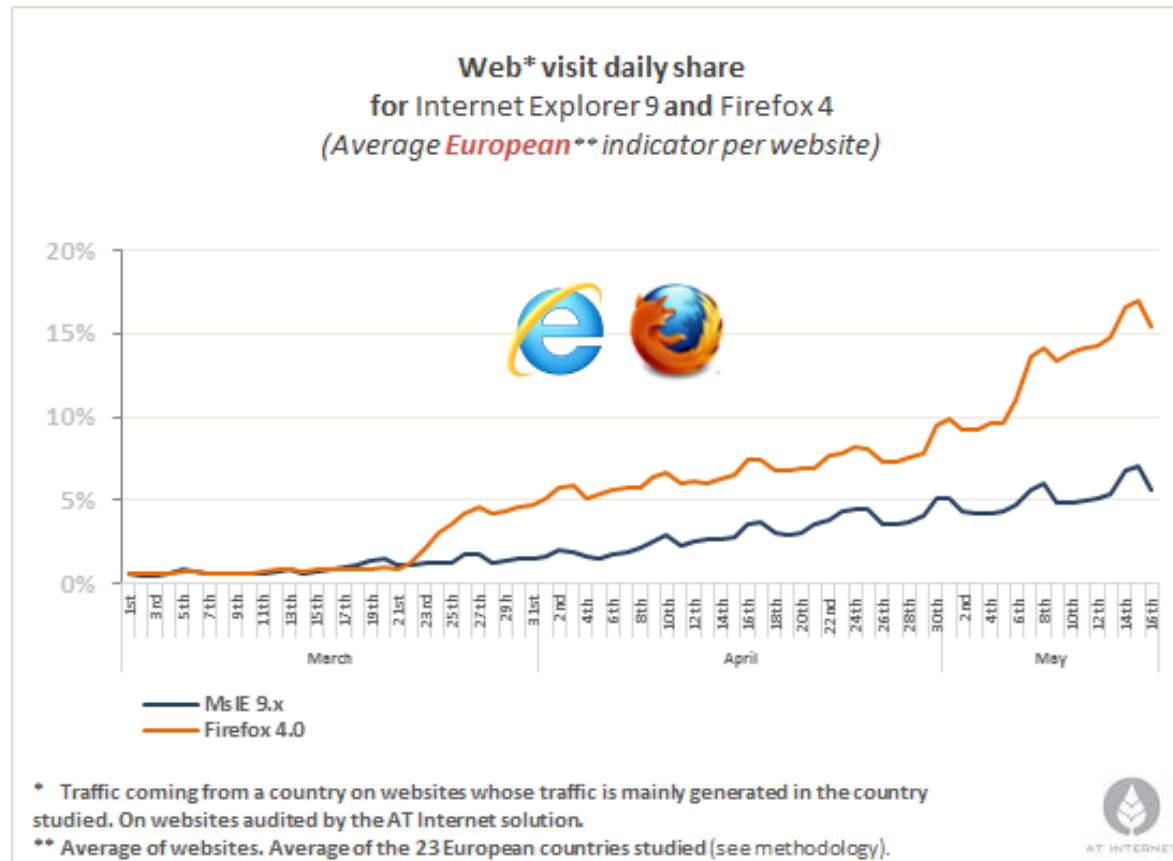
- **Two months after their releases, 15.4% of visits were made through Firefox 4 in Europe compared to 5.6% for Internet Explorer 9**
 - On the 22nd March, the day of Firefox 4's official release, Firefox 4 broke its download record, it was downloaded 8.75 million times in the space of 24 hours. Since its release, its share grew every week to break the 10% visit share barrier at the beginning of May and reach 15.4% on Monday, the 16th May 2011.
 - Released one week earlier than Firefox 4, on the 15th March, Internet Explorer 9 didn't progress at the same rate. Its visit share was only 5.6% on the 16th May, 2.7 times lower than Firefox 4's share. An important point to remember about this evolution is that Internet Explorer 9 doesn't support Windows XP which in April 2011 ran on 42.1% of traffic, on average, for websites in Europe. The use of Internet Explorer 9 will be linked with Windows 7's penetration in the market place.





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■ Will Firefox 4 boost Mozilla's dynamism?

The following table shows traffic distribution by browser version, an estimate of the average distribution recorded on websites in Europe in April 2010 and April 2011.





- **In one year, IE8's visit share remained stable: 31.4% in April 2011 vs. 31.2% in April 2010**
 - The different versions of IE7 lost ground: -7 points (9.4% in April 2011),
 - IE6 SP2: -4.4 points (2.2% in April 2011).
- **As was the case for Firefox 3.6's share: 20% in April 2010 and 2011**
 - The slight loss of ground experienced by Mozilla/Firefox over one year(-0.8 point) may be explained by a low visit share for Firefox 3.5 (-4.9 points) and previous versions, which did not offset the evolution for both Firefox 3.6 (stable) and Firefox 4 (released recently).
 - Nevertheless, as shown previously, after losing ground over a 4 month period, Mozilla/Firefox gained share in April (+0.3 points) after the successful launch of Firefox 4. Is this a simple after effect associated with its launch? To be continued...





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Web visit* distribution by browser versions Average European** indicator per website		
	April 2010	April 2011
 Internet Explorer	55.7%	46.3%
MsIE 8.x	31.2%	31.4%
MsIE 7.x	16.4%	9.4%
MsIE 9.x	0.0%	2.9%
MsIE 6.x SP2	6.6%	2.2%
 Mozilla/Firefox	30.3%	29.5%
Firefox 3.6	20.0%	20.0%
Firefox 4.0	0.0%	6.7%
Firefox 3.5	6.8%	1.9%
 Google Chrome	5.7%	12.8%
Chrome 10.x	0.0%	11.3%
 Safari	5.3%	8.3%
Safari 5.x	0.0%	6.6%
Safari 4.x	5.1%	1.2%
Other OS	3.0%	3.1%
TOTAL	100%	100%

* Traffic coming from a country on websites whose traffic is mainly generated in the country studied. On websites audited by the AT Internet solution.

** Average of the 23 European countries studied (see methodology).



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■ Focus on how different browsers are used

Lowest bounce rate for Internet Explorer

The following graphs present the bounce rate and the time spent by entering visit for traffic generated by different browsers in Europe during the month of April 2011.

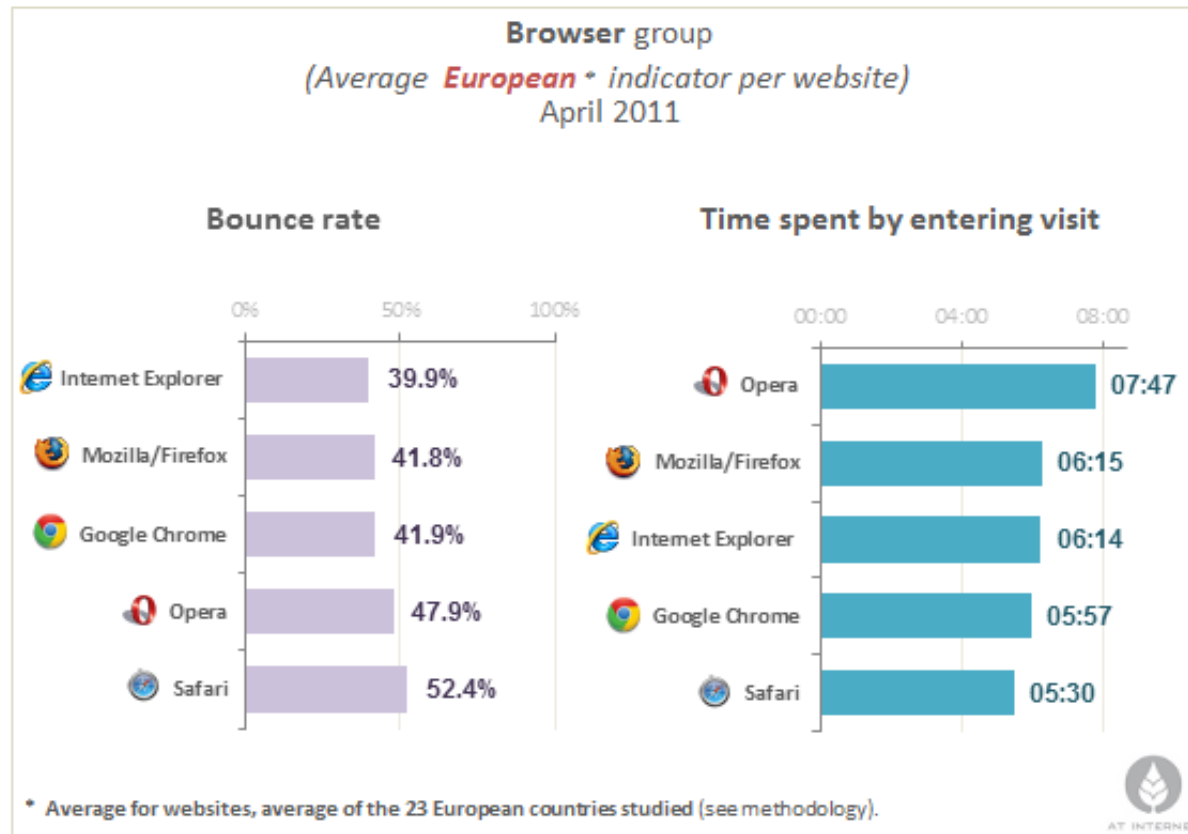
- **Internet Explorer had the best bounce rate of the top 5**
 - **39.9%** of traffic through Internet Explorer had one page view,
 - Followed by Mozilla/Firefox (41.8%) and Google Chrome (41.9%).
- **For the first time Safari was in last place with a bounce rate of 52.4%.**
 - Safari had the shortest time spent by entering visit (5 minutes 30 seconds). Amongst numerous possible explanations, the use of mobile phones may be proportionally greater for traffic coming from Safari which in turn leads to different on site behaviour.
 - These differences in bounce rate can be linked to the compatibility of sites with the different browsers. The browser war is intensifying, sites may have to increasingly test what Internet users see in order to make the sites more accessible.





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Internet Explorer is used more on weekdays although the other browsers are more popular at the weekend






- **Internet Explorer's market share is higher on weekdays:**
 - On average, in April 2011, Internet Explorer's visit share increased by 6.4 points on weekdays in Europe compared with its weekend visit share (47.7% on weekdays vs. 41.3% at the weekend).
 - People may use Internet Explorer at work.
- **Whilst its competitors are used more at the weekend:**
 - Mozilla/Firefox, Google Chrome and Safari's visit share are between 1.8 and 2.1 points higher at the weekend than on weekdays.





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Web visit* distribution by browser (Average european** indicator per website)	April 2011	
	Weekdays***	Weekends***
 Internet Explorer	47.7%	41.3%
 Mozilla/Firefox	29.1%	30.9%
 Google Chrome	12.4%	14.3%
 Safari	7.9%	10.0%
 Opera	2.4%	2.8%
<i>Other browsers</i>	0.6%	0.7%

* Traffic coming from a country on websites whose traffic is mainly generated in the country studied. On websites audited by the AT Internet solution.

** Average of the 23 European countries studied (see methodology).

*** The days influence (Monday to Friday for weekdays, Saturday and Sunday for weekends) is homogenized.





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The most used combination, of installing both Windows XP and Internet Explorer, accounts for almost one visit out of 4 on average for websites in Europe

The following graph presents the different combinations of browser groups and operating systems which are used in Europe. For each installation, two figures are indicated. The first figure corresponds to the average share of the browser group + operating system combination for websites in Europe. The second figure corresponds to the distribution of the different browsers used for each operating system.

- **Windows XP + Internet Explorer: 22.9% of traffic on average for websites in Europe, in other words 54.2% of traffic from XP in April 2011 (vs. 46.3% for IE when all operating systems are considered)**
 - Internet Explorer is also used with the Vista Operating System which comes as no surprise: 54.6% of traffic from Vista used Internet Explorer,
 - Although it corresponds to the average for Windows 7: 46.4% of traffic from 7 used Internet Explorer. Nevertheless, this installation is the third most important on the market: on average 13.2% of traffic was made through 7 with Internet Explorer.





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- **The second most used combination in Europe was Windows XP + Mozilla/Firefox: 13.3% of traffic on average for websites, in other words 31.4% of traffic came from XP (vs. 29.5% for Mozilla when all operating systems are considered)**
 - Nevertheless, there is a high ratio for the Windows 7 + Mozilla/Firefox combination as far as traffic coming from Windows 7 is concerned: 31.7% of traffic coming from 7 was with Mozilla.
- **Google Chrome used with Windows 7 and Vista:**
 - 17.6% of traffic from Windows 7 used Chrome (vs. 12.8% when all operating systems are considered),
 - 15.2% of traffic from Vista used Chrome.
- **For Safari, installations with Apple's operating systems dominate the market:**
 - 70.7% of traffic from Mac OS X Intel used Safari (vs. 8.3% when all operating systems are considered),
 - 62.3% of traffic from Mac OS X PPC used Safari.





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Visit* shares of the installations Browser group x Operating System Average European** indicator per website										
(April 2011)	Internet Explorer	Mozilla/Firefox	Google Chrome	Safari	All browsers					
Windows XP	22.9%	54.2%	13.3%	31.4%	4.7%	11.1%	0.3%	0.6%	42.1%	100%
Windows 7	13.2%	46.4%	9.0%	31.7%	5.0%	17.6%	0.4%	1.3%	28.8%	100%
Windows Vista	8.8%	54.6%	4.3%	26.7%	2.4%	15.2%	0.2%	1.2%	16.4%	100%
Mac OS X Intel	0.0%	0.0%	1.4%	22.0%	0.5%	6.9%	4.6%	70.7%	6.6%	100%
iOS	-	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%	100%	2.8%	100%
Mac OS X PPC	-	0.0%	0.1%	37.3%	-	0.0%	0.2%	62.3%	0.3%	100%
All OS	46.3%		29.5%		12.8%		8.3%		100.0%	

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** Average of the 23 European countries studied (see methodology).



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After a stable period at the beginning of the year, Internet Explorer has lost ground over the last few months. It lost 1.6 points in April despite the launch of IE9 in March but its use is linked with Windows 7's penetration in the market place.

Mozilla/Firefox, the second most popular browser, experienced a slowdown for a few months, decreasing in average visit share in Europe, from 30.3% in April 2010 to 29.5% in April 2011. However there was a slight increase between March and April (+0.3 points): the forthcoming months will show us if Firefox 4, released two months ago, helps boost the use of Mozilla.

The big winners are undoubtedly Safari and Google Chrome with respective gains of 3 and 7.1 points in one year. Google Chrome, taking advantage of its sales campaign, enjoyed higher increases each month (between 0.5 points and 1 point) and nothing seems to be stopping it...

Stay tuned as AT Internet will provide a new browser barometer soon.





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Methodology

- We are interested in the average distribution of visits, by browser, which have been recorded by a certain cross-section of websites (except mobile websites).
- In order to establish the cross-section of websites to be used as part of a study, a website is only used if the selection criteria, which have been established previously, are respected. These criteria are very strict and their aim is to remove any websites which have an anecdotal audience, or a chaotic audience, or whose collected data underlines a dysfunction in the measure.
- For each country, only websites whose traffic has been mainly generated within the country itself are considered. In addition to this, only visits to these websites which have been generated within the country itself are considered. We calculate average traffic distribution per website. For every website, the visit share for each browser corresponds to the total number of visits of the analysed browser compared to the overall number of visits for all browsers combined over a given period.
- The European indicator is representative of the countries audited. The average visit share in Europe corresponds to the average of the indicators for the 23 countries studied. To evaluate the average, all countries are regarded as being equal in the value of their parameters.
- The 23 countries included in the study were:
- Austria, Belgium, Bulgaria, the Czech Republic, Denmark, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Luxemburg, the Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Spain, Sweden, Switzerland and the United Kingdom.





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Surveys Department

- To find out the latest trends in terms of web traffic and be up to date with web issues in an evolving market
 - Surveys service provided by AT Internet, the European leader in Online Intelligence:
 - 3,500 customers
 - Present in 9 countries
 - No. 1 in Europe in terms of number of customers
 - No. 1 in France in terms of revenue, number of customers and pages audited
 - Quality and exclusivity of this service is based on:
 - More than 350,000 websites audited by AT Internet solutions
 - Reliable measured data
 - Specialists' expertise





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■ 6 main topics:

- Internet user behaviour (traffic evolution, web prime time, mobile websites etc)
- Search Engine Barometers
- Browser Barometers
- Internet user equipment (Operating System barometers , Internet service provider etc)
- Online marketing trends (online campaigns, quality of access to websites etc)
- Focus on current events (political, sporting etc)

