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Browser Barometer

Google Chrome and Safari strengthen their position in Europe once again

18.9% of traffic comes from Google Chrome in Europe and 11.2% from Safari in March 2012

Survey published on the 10th May 2012



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Study carried out from the 1st to the 31st May 2012 within a cross section of 14,558 websites audited by AT Internet.

The browser market trend observed in Europe during the 1st quarter of 2012 was the same as in 2011: the challengers, Google Chrome and Safari, continued their growth whilst Mozilla/Firefox and Internet Explorer in particular lost more and more ground.



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- On average almost 20% of traffic comes from Google Chrome and more than 10% from Safari in Europe in March 2012

The following graph 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 March 2011 and March 2012. The traffic distribution for 23 different countries was estimated (for further information on this please read the Methodology).

The same two browsers continued to gain ground over several months:

- **Google Chrome**, 3rd in the browser top 5 in Europe, reached 18.9% of traffic in Europe in March 2012
 - +6.8 points compared to March 2011.
- **Safari**, 4th with 11.2% of traffic in Europe, continued its growth with a gain of 3.4 points between March 2011 and March 2012.



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- The leader, Internet Explorer, lost more than 8 visit share points between March 2011 and March 2012, falling to under the 40% mark
 - In March 2012, on average **39.5%** of visits to a website in a European country were made through Internet Explorer compared to 47.9% in March 2011.
- Mozilla/Firefox, 2nd in the browser top 5, continued to lose ground with a 3.2 point loss in one year
 - Mozilla/Firefox's visit share decreased from 29.2% of traffic in March 2011 to **26%** in March 2012 in Europe.
- Opera maintains its 5th position and for the first time lost almost half a point between March 2011 and March 2012 to fall to 2.1% of traffic.

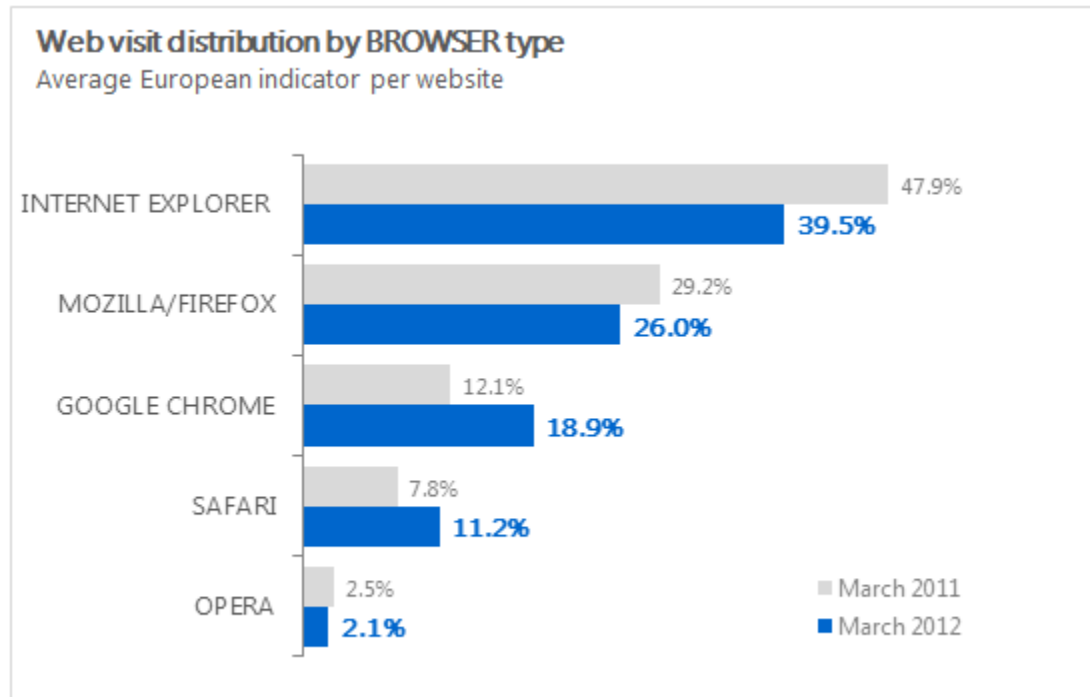


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■ Google Chrome on the road for 2nd place

The following graph shows traffic distribution by browser, an estimate of the average distribution recorded on websites in Europe over the last 13-month period.

There are clear trends to be seen on the browser market:

- **The N°1 and N°2 browsers lost ground over the months**
 - Internet Explorer's visit share has dropped by 4.7 points since September 2011 and fell under the 40% mark in March 2012. However, over the last 3 months, its decrease is less significant (-1.4 points compared to -3.3 points between September and December 2011).
 - Mozilla/Firefox has also decreased but less than Internet Explorer over the last 13-month period.



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- **Google Chrome gained ground and reduced the gap with Mozilla/Firefox**
 - In March 2011, the visit share gap was 17.1 points, compared to 11.9 points in September 2011 and 7.1 points in March 2012.
 - Its growth has slowed down slightly over the last 3 months:
 - June 2011 vs. March 2011: +1.9 points
 - September 2011 vs. June 2011: +1.9 points
 - December 2011 vs. September 2011: +2.3 points
 - March 2012 vs. December 2011: +0.7 points
- **Safari continued to increase**, as a result of the growth of Apple's mobile terminals.

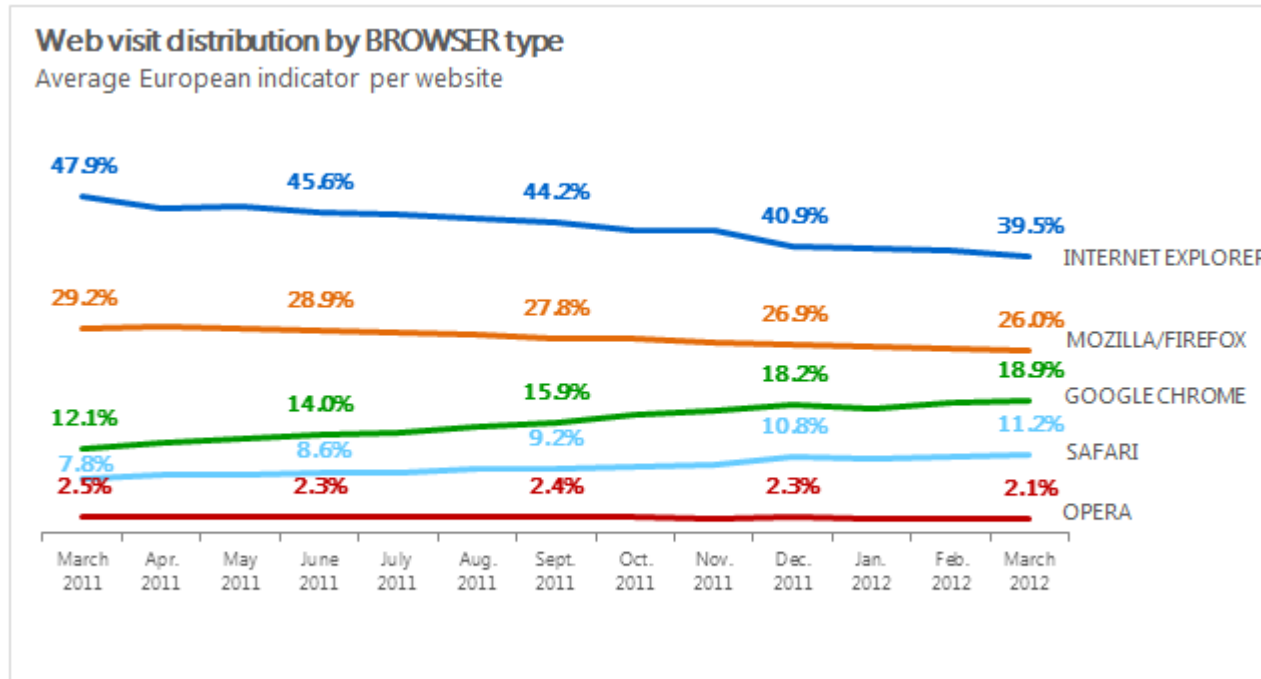
Since January 2012, Opera has had its lowest visit shares over the last 13-month period (2.1%).



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- Google Chrome ahead of Mozilla in Spain, Portugal and Italy in particular

We are now going to have an in-depth look at the countries concerned by both the evolutions of Internet Explorer and Google Chrome which are greater than the European average: Belgium, Italy, Portugal and Spain.

The following graphs provide more information on these 4 European countries. They show an estimation of the average distribution of the top 5 browsers in visit shares, for websites in each of these 4 countries, between March 2011 and March 2012.

- In Spain and in Portugal, Google Chrome is in 2nd place in the browser top 5 with 1 out of 4 visits on average in March 2012 (24.8% and 24.5% respectively compared to 18.9% in Europe)
 - Google Chrome increased by 10 points in Spain in one year whilst the leader Internet Explorer lost almost 15 points.
 - Google Chrome increased by 11.9 points in Portugal between March 2011 and March 2012 whilst the leader Internet Explorer lost 13 points. However its visit share remained higher than the European average in March 2012: 52.3% vs. 39.5%.



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- **In Italy, Google Chrome is the 2nd leading browser with an average visit share of 23.5% in March 2012**
 - +8.5 points in one year whilst Internet Explorer lost 12.5 points but its visit share remained higher than 40%.
 - Safari gained ground with 12% of traffic in March 2012 (vs. 11.2% in Europe) and almost a 5 point gain in one year.
- **In Belgium, Google Chrome is in 3rd place and came ever closer to Mozilla**
 - With a 6.9 point gain in one year, on average 17% of visits were made through Google Chrome whilst Mozilla decreased by 1 point over the same period and fell to 20.8%.
 - Internet Explorer lost more than 9 points, but on average almost one out of two visits were made through Internet Explorer in Belgium in March 2012.



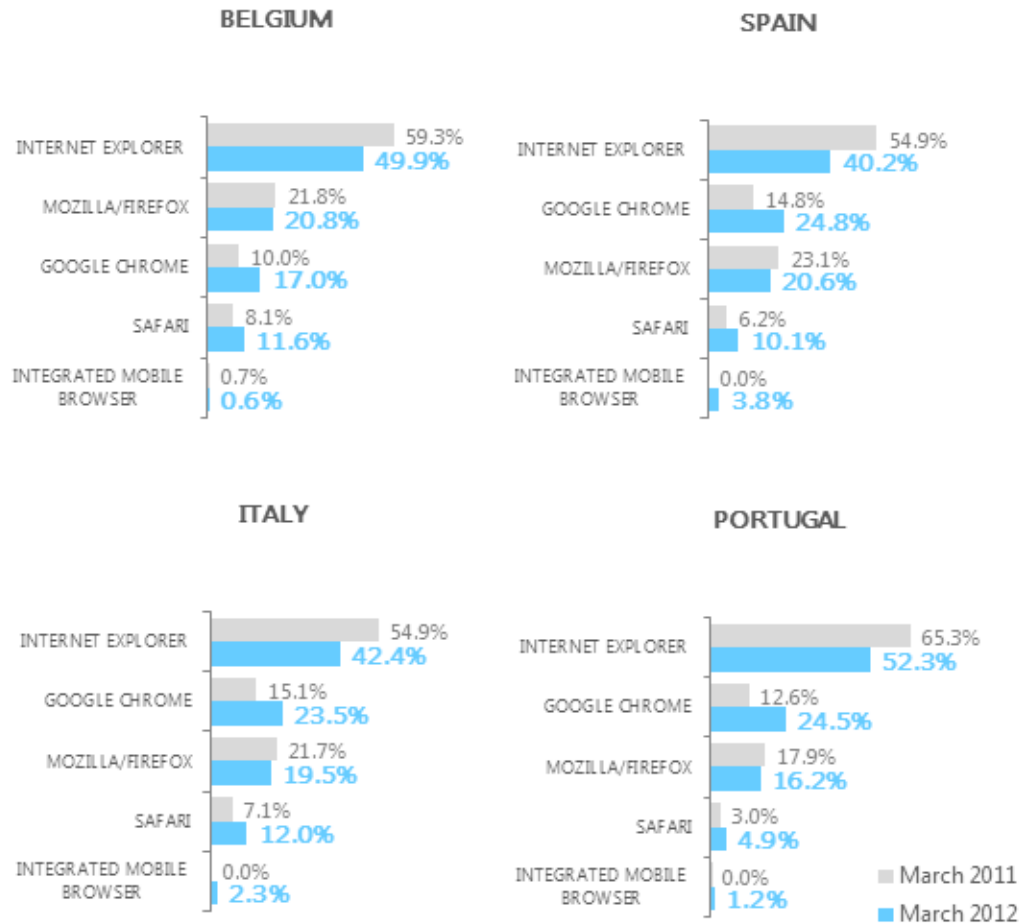
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TOP 5 BROWSERS in visit share

Average indicator per website



Source: AT INTERNET



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The following graph shows traffic distribution by browser, an estimate of the average distribution recorded on websites in France over the last 13-month period.

- **In France, Mozilla/Firefox with 28.3% of traffic in March 2012 is still ahead of Google Chrome with 20%**
 - For how long? In March 2011, the visit share gap was 17.1 points, and was reduced to 8.3 points in March 2012.
 - Internet Explorer's visit share decreased by almost 10 points in one year and fell to 36.6% in March 2012 in France, lower than its visit share in Europe.

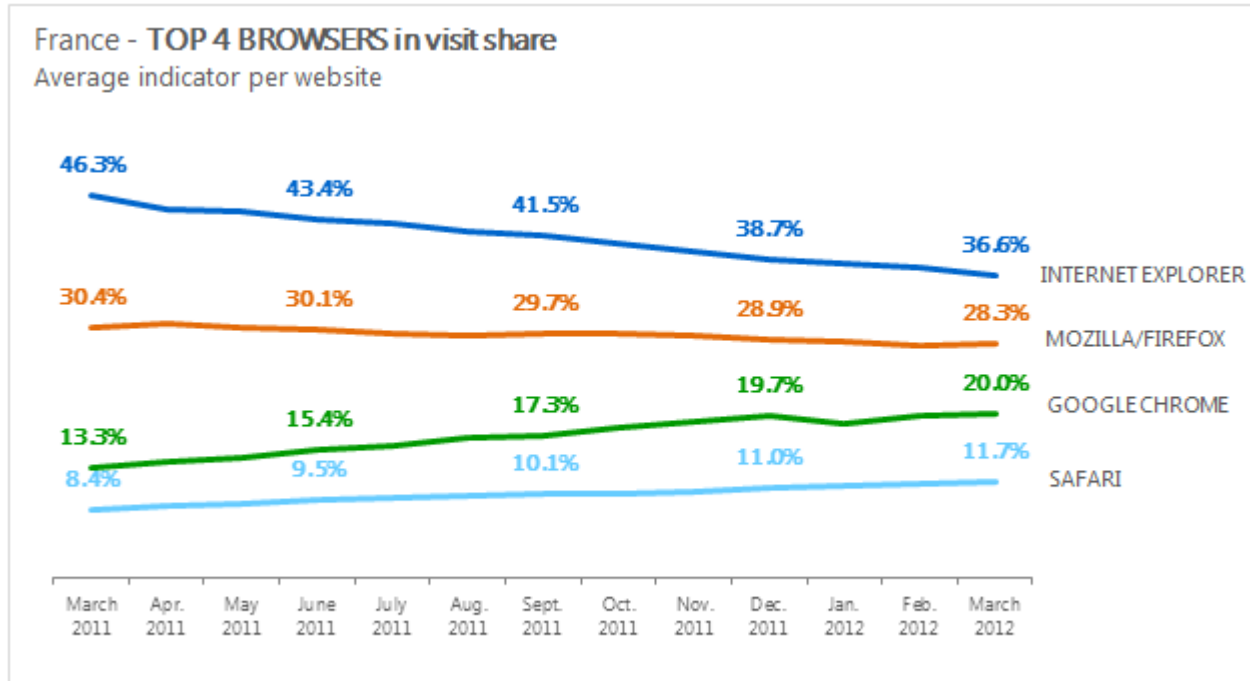


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The beginning of the year has been promising for Google Chrome which now accounts for an average of 18.9% of visits on websites in Europe in March 2012. The gap with Mozilla/Firefox (26% of traffic) has become increasingly reduced and if the trend is not reversed, Google Chrome will be ahead of Mozilla/Firefox. However, the growth of Google Chrome, which was significant in 2011, was reduced in the 1st quarter of 2012: is this a temporary slowdown? Or, is Google Chrome reaching a certain limit (because of user profile, user background, etc.)? To be continued with our next set of data.

Safari continued to climb thanks to Apple's success: a 3.4 point increase in one year and a 11.2% visit share in Europe.

Internet Explorer has now fallen to under the 40% mark in visit share in March 2012 in Europe.



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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:
 - Websites audited by AT Internet solutions
 - Reliable measured data
 - Specialists' expertise



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- 6 main topics:
 - Focus on current events (political, sporting etc)
 - Search Engine Barometer
 - Browser Barometer
 - Operating systems Barometer
 - Online marketing trends (online campaigns, quality of access to websites etc)
 - Web trends (traffic evolution, web prime time, mobile websites etc)

