



StatCounter Internet Wars Report

- Winners and Losers

(July 2012 - June 2013)

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Introduction

There is a battle royal under way between the providers of browsers, mobile devices, search engines and social media. What makes the battle fascinating is that many of the big beasts of today's technology age, including Google, Microsoft and Apple are going head to head. Why is this important? As stated in "Digital Wars – Apple, Google, Microsoft & the Battle for the Internet" by Charles Arthur (published by Kogan Page Ltd 2012) "The stakes are high as the reward for winning any of the digital wars is not only enormous wealth, but also the chance to control another part of the digital landscape, displace an existing rival, and determine the shape of things to come."

Because of our day (and indeed night) job in which we strive to provide the best, easy to use, independent web analytics service we can, we found ourselves in a unique position to monitor these internet wars on a global basis. This is why we established StatCounter Global Stats in 2009 for members, media, researchers, bloggers and those who want to keep up with what's happening on the internet.

Our sample of internet usage data is one of the largest available. Our research is based on over 15 billion page views per month (4 billion from the United States; 700 million from the United Kingdom) to the StatCounter network of more than three million websites worldwide.

For space reasons, this report focuses on worldwide, US and UK data but we have not forgotten that we have members across over 200 countries. Individual country stats may be viewed at <http://gs.statcounter.com/> and in the appendix we show how to find your way around StatCounter Global Stats. Please also review the appendix for further information on our methodology.

We would like to thank our members for their terrific support and feedback over the years. We dedicate this report to them.

Aodhan Cullen, CEO, StatCounter

About StatCounter

StatCounter (www.statcounter.com), one of the largest web analytics firms in the world, is used by companies, bloggers, self-employed people, charities and anyone who wants to measure activity on their website, blog or forum.

StatCounter is a user-friendly, real-time service that allows you to capture valuable intelligence about your website traffic. StatCounter members can learn about the visitors to their site with essential statistics including keywords (i.e. the search terms used to find the site), downloads (e.g. which brochures are being accessed) and exit links (i.e. which links people are clicking as they leave the site).

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Executive Summary

Browsers: The big news on the browser front is that Google's Chrome overtook Microsoft's Internet Explorer for the first time in the US in June 2013. Chrome had already established itself as the leader worldwide. This demonstrates how a dominant player like Internet Explorer can be overtaken, although Microsoft could argue that this has been driven by regulatory decisions.

Mobile Vendors: It has been a fascinating 12 months in terms of internet usage and the battle to dominate the mobile landscape. Amongst the highlights has been the rise of Samsung to overtake Apple globally for the first time in June 2013, albeit by a very small margin. Casualties along the way have included Nokia which dropped from number one to third position plus BlackBerry, which declined despite efforts to reinvent itself.

Operating Systems: The operating systems space is no less interesting. Despite the launch of Windows 8, Windows 7 actually increased internet usage share. Globally the almost 12 year old Windows XP refuses to lie down, remaining the second most popular OS.

Search Engines: Google continues to dominate the search engine sector with over 90% referral share on a worldwide basis in June 2013. The market is a little more open in the US where Bing has increased referral share to 11.69% and Yahoo! is on 8.2%. Google, however, remains the clear leader on 77.88%.

Social Media: In terms of referral traffic, Facebook remains the dominant social media player on a worldwide basis and has in fact increased its referral influence from 61.5% 12 months ago to 71.03% in June 2013. Facebook has also increased its referral influence in mature markets such as the US and the UK.

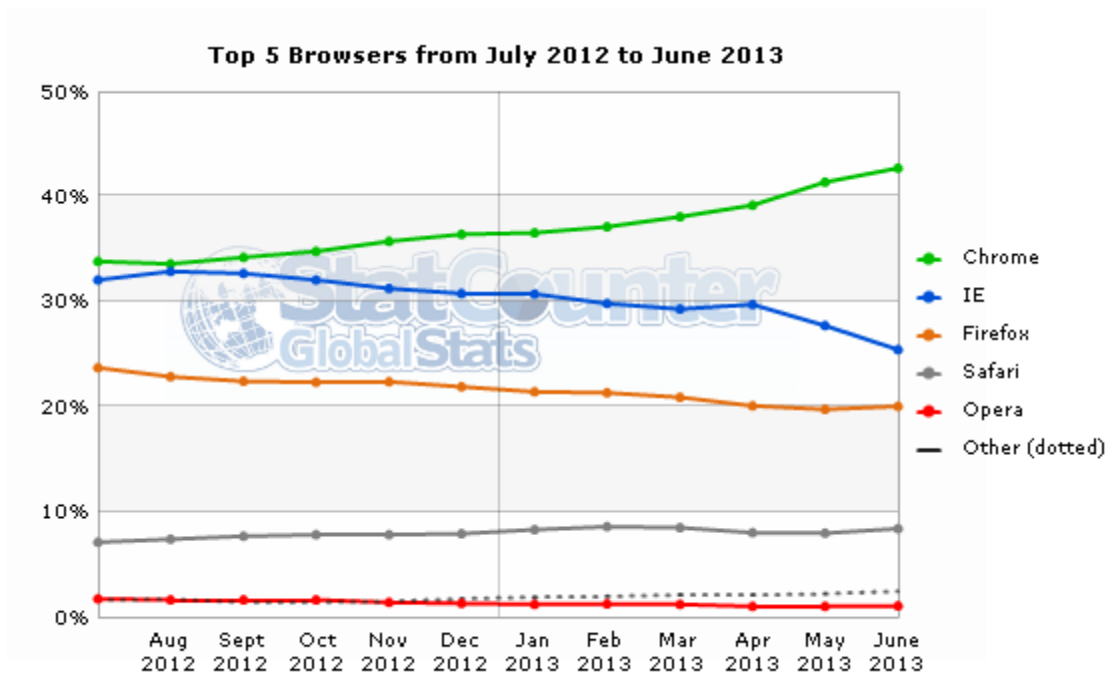
While Twitter is in fifth place in the US, it is number two in the UK suggesting that UK users are more avid Twitter followers than their US counterparts.

Mobile v Non-Mobile: Internet usage via mobile devices is on the increase, although non-mobile usage still dominates worldwide on 83.92%.

Browsers: Chrome winner worldwide - and overtakes Internet Explorer in US for first time

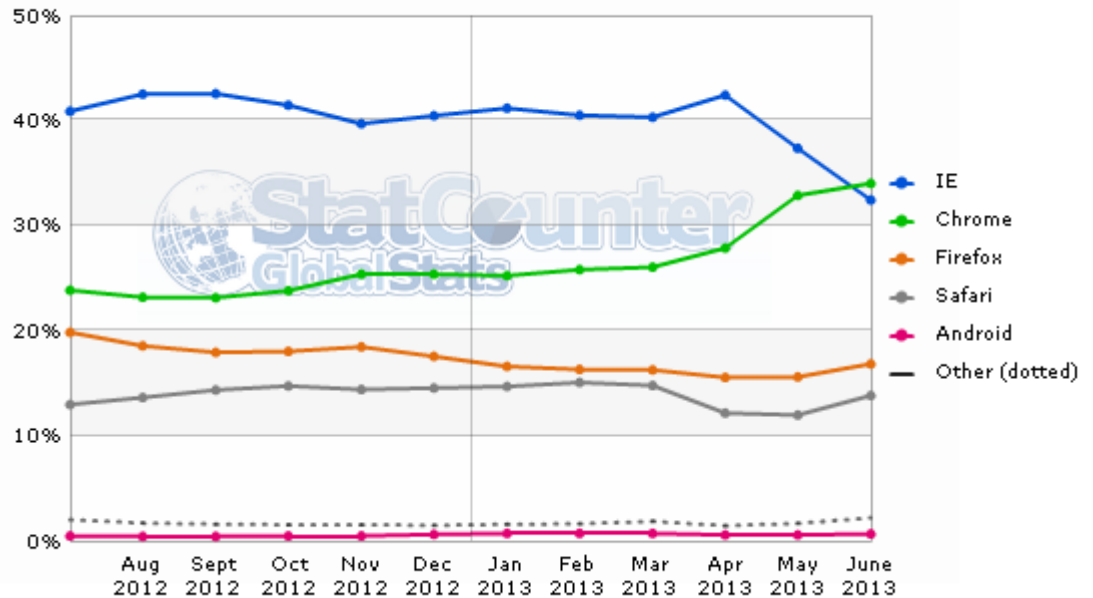
Worldwide: In May 2012 Google's Chrome (32.43%) overtook Microsoft's Internet Explorer (32.12%) for the first time in terms of internet usage worldwide.

Over the last 12 months Chrome has increased its lead and reached 42.68% by June 2013. This has largely been at the expense of Microsoft's Internet Explorer which has declined from 32.04% 12 months ago (July 2012) to 25.44% and Mozilla's Firefox, down from 23.73% to 20.01%.



US: In the United States, IE lost the number one spot in terms of internet usage for the first time in June 2013. Chrome has now taken the number one spot in the US at 34.02% (up from 23.84% 12 months ago). Over the same time frame IE has declined to 32.46% (from 40.89%). Firefox has also lost share in the US, down from 19.83% to 16.86%.

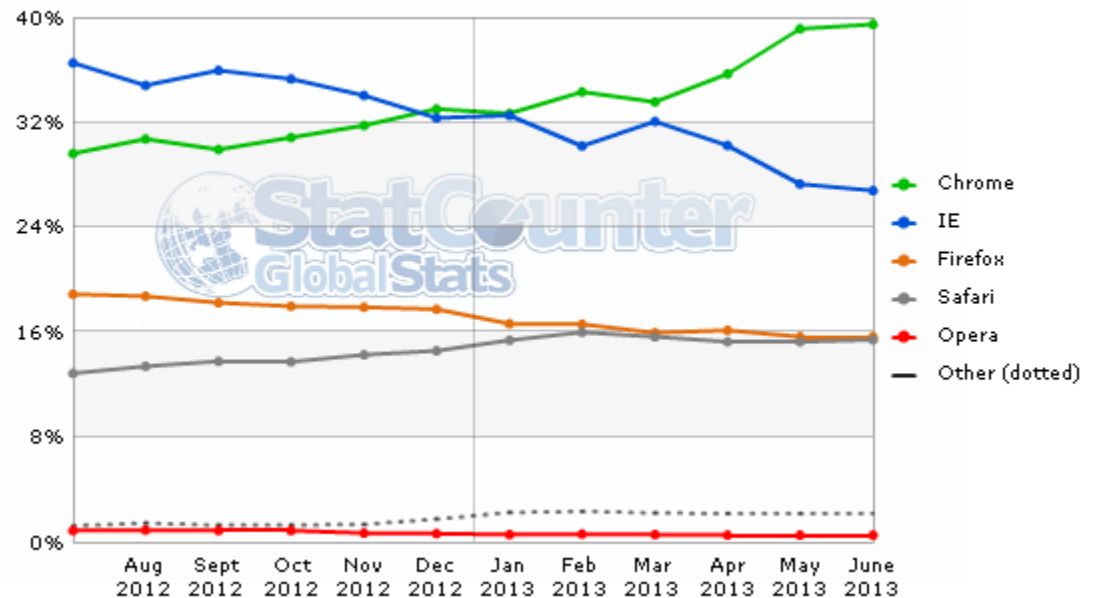
Top 5 Browsers in the United States from July 2012 to June 2013



UK: In the UK Chrome has overtaken IE over the last year going from 29.6% in July 2012 to 39.45% today. Over the same period IE has declined from 36.53% to 26.8%. Firefox has also seen a decline in the UK from 18.9% to 15.63%. Despite the competition from Chrome, Safari has held up well, increasing from 12.85% to 15.41%.

Note: Safari in this context includes use on all non-mobile devices including iPad. Please see the appendix for further information on our methodology.

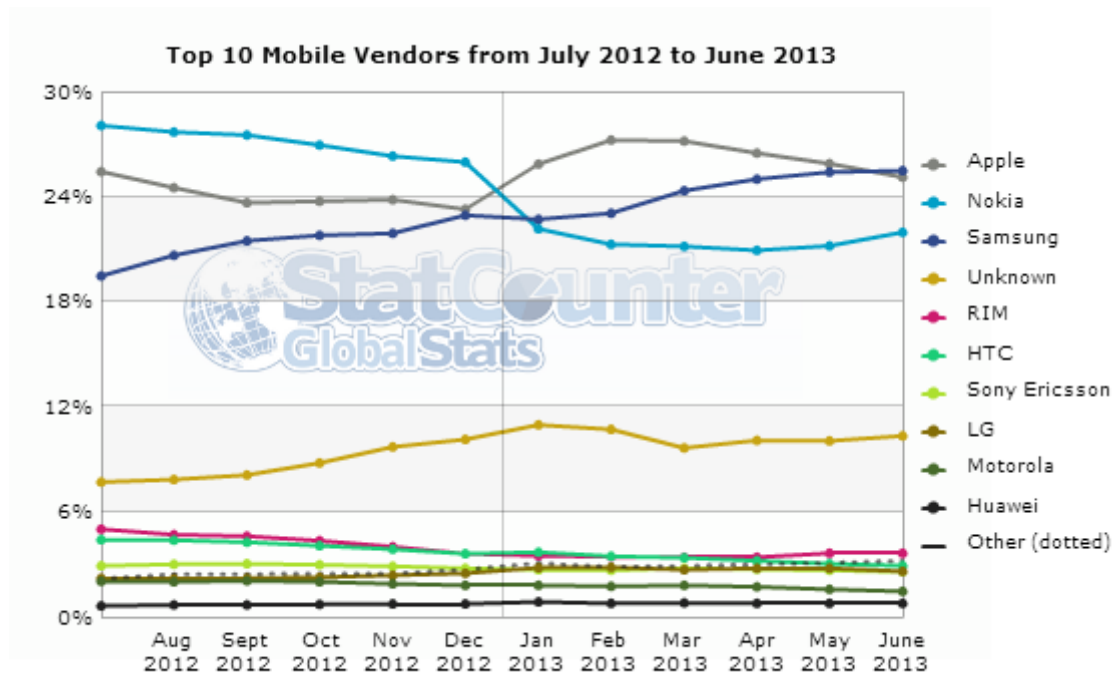
Top 5 Browsers in United Kingdom from July 2012 to June 2013



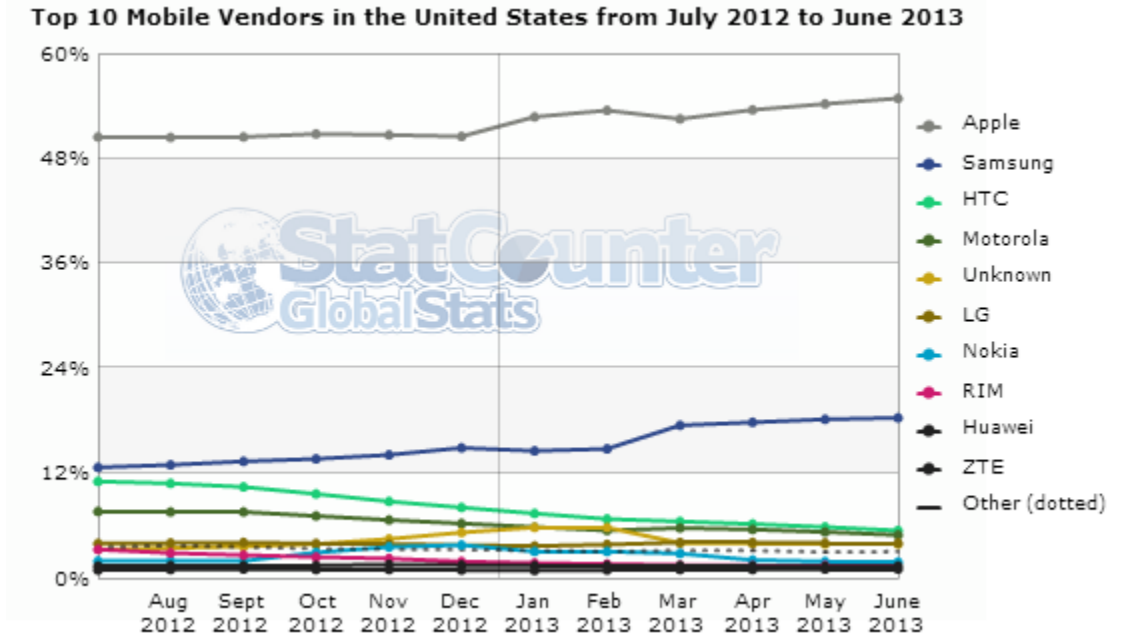
Mobile Vendors: Samsung overtakes Apple globally for first time - while Nokia and BlackBerry hit the ropes

- But Apple still clear leader in US and UK

Worldwide: 12 months ago, Nokia led globally with 28.05% of internet usage followed by Apple on 25.43% and Samsung on 19.46%. The big winner over the year has been Samsung, which, for the first time in June 2013, marginally passed Apple on a worldwide basis to take number one spot in terms of internet usage. Samsung has seen its internet usage rise to 25.47%, just ahead of Apple (25.09%). Nokia has dropped to third place globally on 21.96%. BlackBerry (formerly RIM) has declined over 12 months from 5.0% to 3.62%. However, perhaps sparked by its new model, over the last six months BlackBerry's fall may have bottomed out as it is up slightly from 3.48% in January 2013.



US: In the US Apple is the clear leader at 54.84%, up from 50.45% in July 2012. It is followed some way behind by a growing Samsung, up from 12.65% to 18.3%. BlackBerry (formerly RIM) has gone from 3.24% to 1.39%, with no recovery in evidence since the New Year (1.72% in January) in contrast to worldwide data.



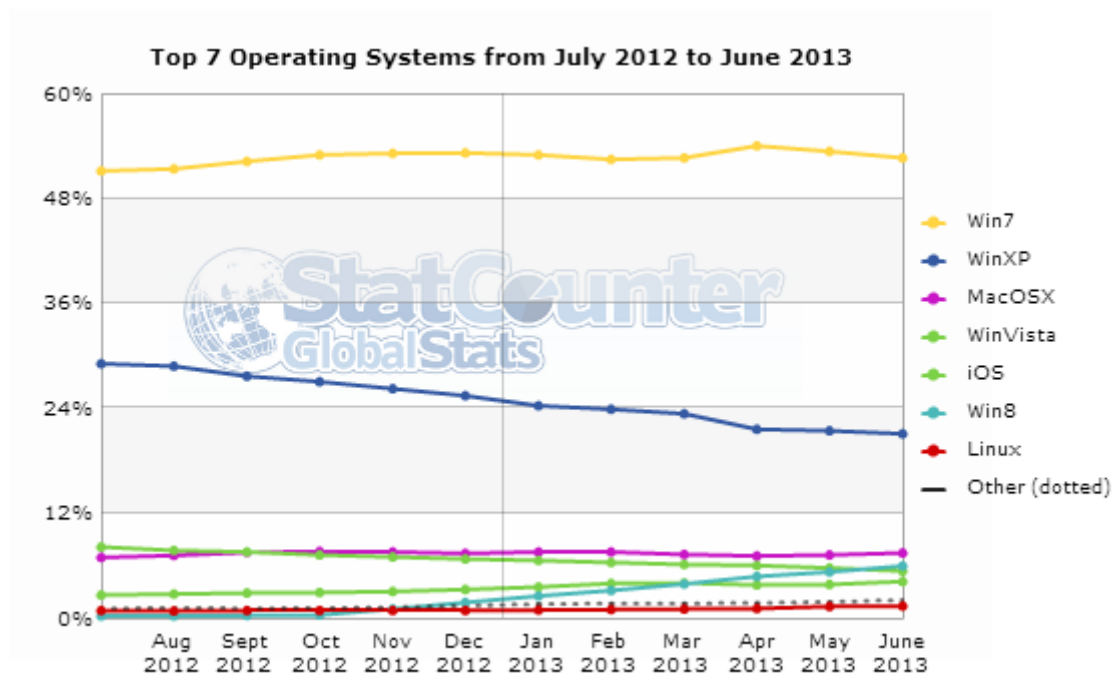
UK: In the UK Apple is also the clear leader, increasing over 12 months from 43.04% in July 2012 to 47.97% (in June 2013). BlackBerry (formerly RIM), in one of its strongest markets, fell from 27.83% in July 2012, to 16.15% thus losing its number two spot to Samsung, up from 12.69% to 20.45%

Operating Systems: Windows 7 increases internet usage share despite launch of Windows 8 sibling

- XP refuses to lie down

Worldwide: Despite the launch and heavy promotion of Windows 8 by Microsoft, its earlier operating system Windows 7 has actually increased internet usage share globally from 51.14% in July 2012 to 52.62% in June this year. Moreover, despite its best efforts to kill it off, the almost 12 year old Windows XP stubbornly remains the world's second most popular operating system by far in terms of internet usage with 21.06% (29.1% July 2012).

Windows 8 is gaining traction (5.94%) and in June 2013 overtook Vista (5.4%). Meanwhile Apple's Mac OSX has remained consistent in third place on 7.43% - little changed from July 12 months previously (6.92%). If Windows 8 retains its growth pattern then the next landmark to look out for in the operating systems battle should be when Windows 8 overtakes Mac OSX.



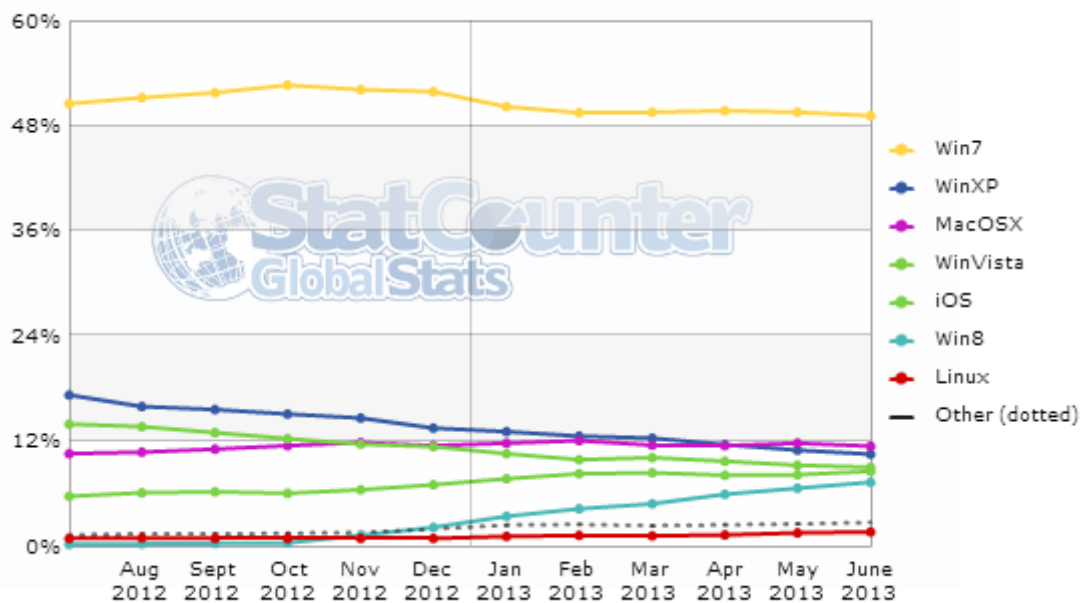
US: In the US too, Windows 7 is the most popular operating system in terms of internet usage on 47.92% (only slightly down from a year ago 48.86%). Mac OSX currently holds second place in the US on 14.16% (13.61% in July 2012). Windows XP is currently in third place in the US on 11.89% (down from 18.09%). Vista is in fourth slot on 8.5% (12.46% July last). Windows 8 on 6.5% overtook iOS in April this year for fifth position.

Note: Our non-mobile stats include desktop, laptop and tablet devices. iOS in this context refers to iPad usage. Please see the appendix for further information on our methodology.

UK: Windows 8 on 7.24% is performing better in the UK than in the US or worldwide. However, Windows 7 leads in the UK on 49.14%, not far off 12 months ago (50.49%). As in the US, Mac OSX is in second position on 11.38%. Win XP (10.49%) takes third spot, followed by Win Vista (9.0%), iOS (8.51%) and Win8 (7.24%).

Note: Our non-mobile stats include desktop, laptop and tablet devices. iOS in this context refers to iPad usage. Please see the appendix for further information on our methodology.

Top 7 Operating Systems in United Kingdom from July 2012 to June 2013



Search Engines: Google still dominates worldwide but more competitive in US where Bing makes some headway

Worldwide: Despite Microsoft's investment in Bing, it is making little headway globally against Google which continues to dominate the search engine sector with 90.09% in June 2013 (down slightly from 91.17% in July 2012). Bing on 3.75% is a long way behind but up slightly from 3.22% a year ago. Yahoo! on 2.83% takes third spot (compared to 2.95% a year ago).

US: The market is more competitive in the US where Google is now on 77.88% (down from 80.28% twelve months ago). Bing has increased referral share to 11.69% (from 9.5%). Yahoo! seems to be treading water on 8.2% (from 8.22%).

UK: The UK is more reflective of global trends with Google on 89.69% (91.15% in July 2012). Bing is up more than 1% to 5.96% (4.62% in July 2012). Yahoo! is on 2.92% (up from 2.33%).

Social Media: Reports of Facebook decline appear exaggerated

- Twitter has greater referral influence in the UK than in the US

Worldwide: Following on from its IPO it has been an interesting year for Facebook. A report from Piper Jaffrey in April 2013 suggested that Facebook might be losing its lustre with teens (<http://news.yahoo.com/teens-facebook-decline-says-report-050429377--abc-news-tech.html>).

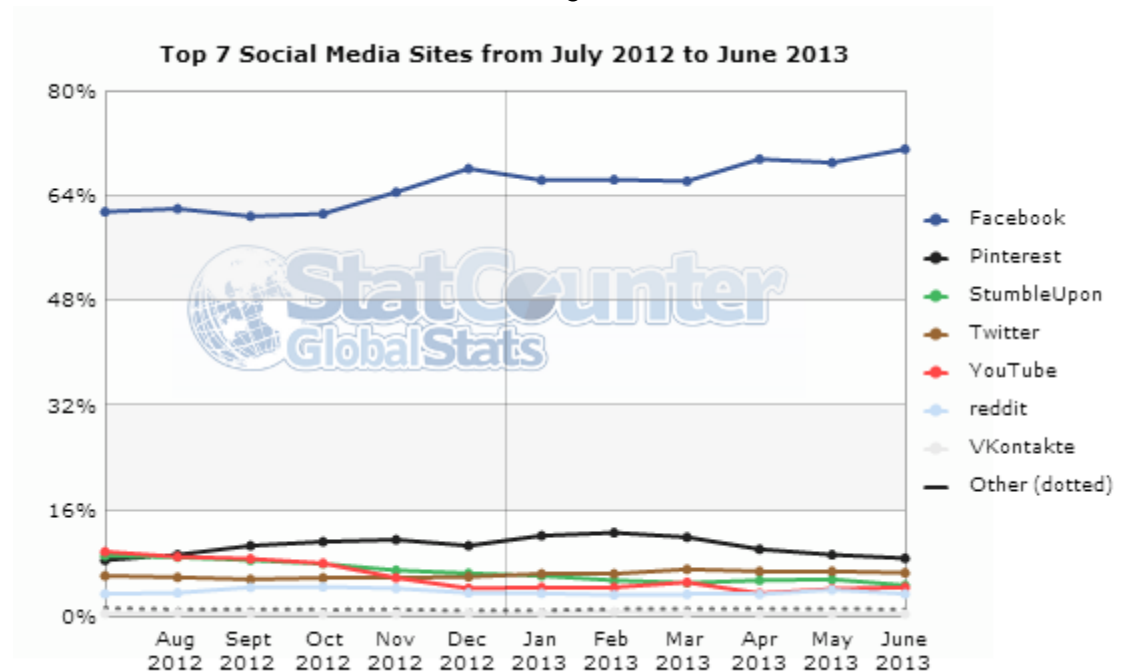
StatCounter Global Stats does not differentiate between age groups but finds no evidence of a Facebook decline overall in terms of the amount of referral traffic it generates. Indeed, worldwide it has significantly increased its referral influence from 61.5% 12 months ago to 71.03% in June 2013.

Meanwhile

StumbleUpon has declined from 9.16% to 4.67% and has lost its number two slot to Pinterest (up slightly from 8.5% to 8.76%). In January of this year Twitter also overtook StumbleUpon to claim third place (now 6.54%, up from 6.13%).

YouTube appears to have declined from 9.8% to 4.36% but YouTube's ratings

from month to month can vary significantly. This is because YouTube is a social media site on which content is generally directly consumed rather than being a medium for the sharing of links to third party sites. Please see the appendix for further information on our methodology.

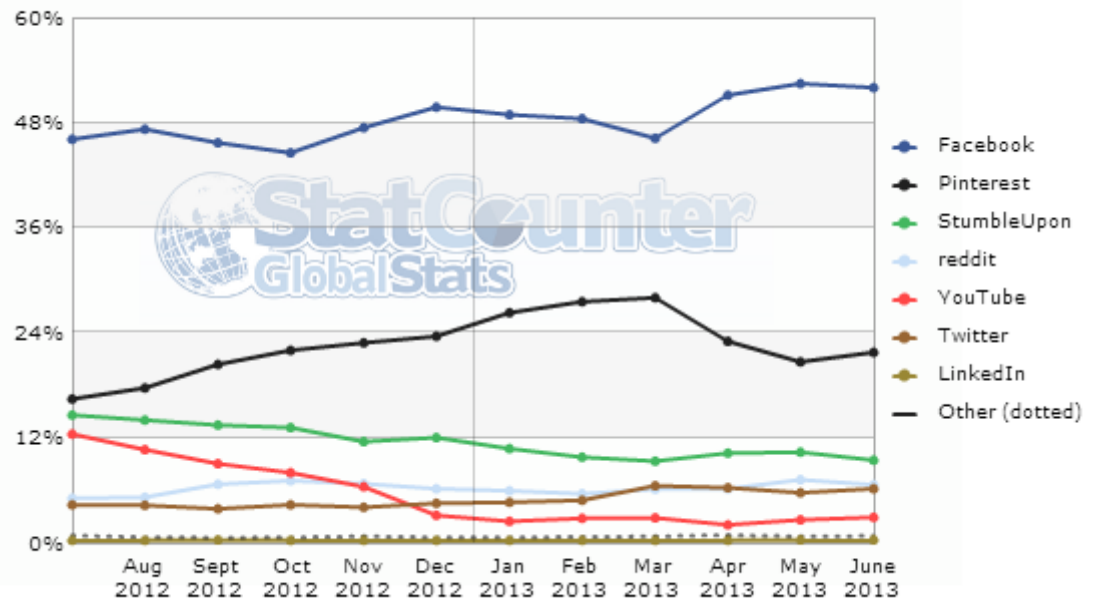


US: Some commentators have suggested that Facebook is slowing in more mature markets. Again in terms of referral influence, our data does not support this currently in the US (or in the UK – see below). In the US Facebook has increased from 46.11% to 51.97%.

Over the year Pinterest has increased referral traffic from 16.4% to 21.76% and is number two in the US. However, it may be significant that Pinterest has declined since March 2013 from 27.98%.

StumbleUpon reflects its global fall, down from 14.57% to 9.45% in the US. Reddit takes fourth slot in the US on 6.65 % (up from 5.09%). Twitter on 6.2% is in fifth place in the US.

Top 7 Social Media Sites in the United States from July 2012 to June 2013



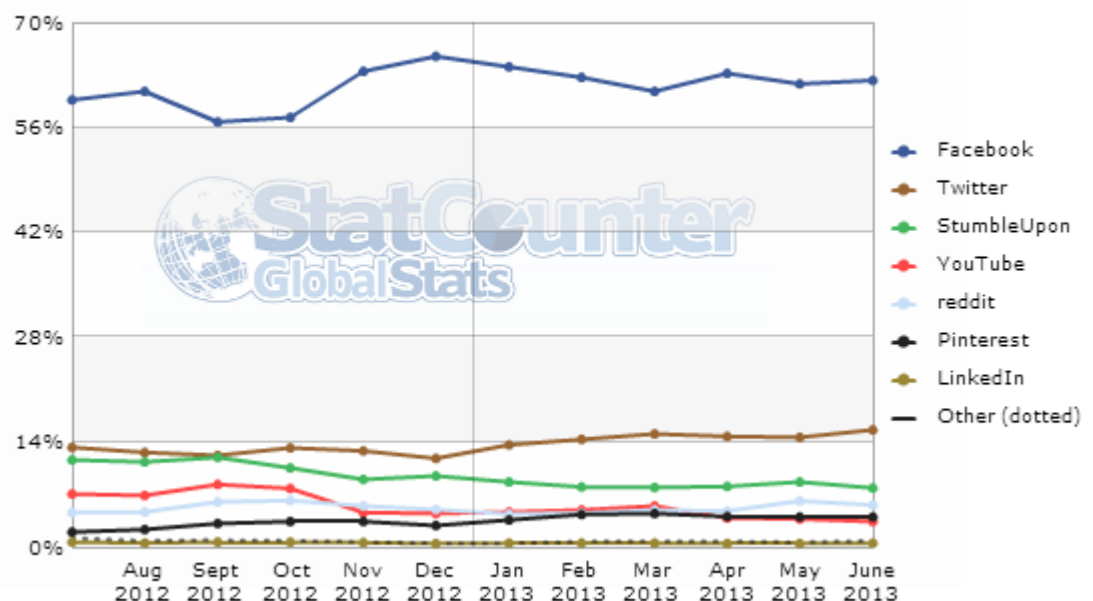
UK: Here Facebook has also increased its referral influence to 62.23% (from 59.62%). UK users appear to be bigger Twitter followers than their US cousins with Twitter being the number two social media outlet on 15.61% (up from 13.26% in July 2012).

StumbleUpon is in third place (down from 11.61% to 7.87%).

Reddit on 5.59% is

number four in the UK. Pinterest has less traction in the UK than in the US but it has almost doubled its referral influence from 2.02% to 3.99%.

Top 7 Social Media Sites in United Kingdom from July 2012 to June 2013

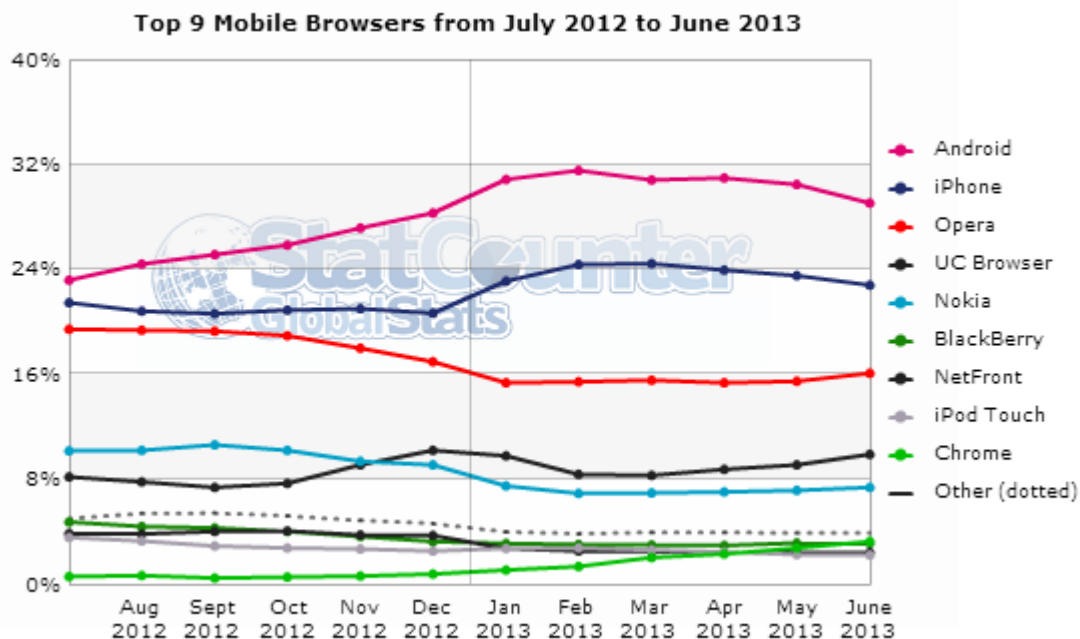


Mobile Browsers: Android leads globally but Safari remains leader in US and UK

- Chrome overtakes BlackBerry in US and starts to make ripples in UK

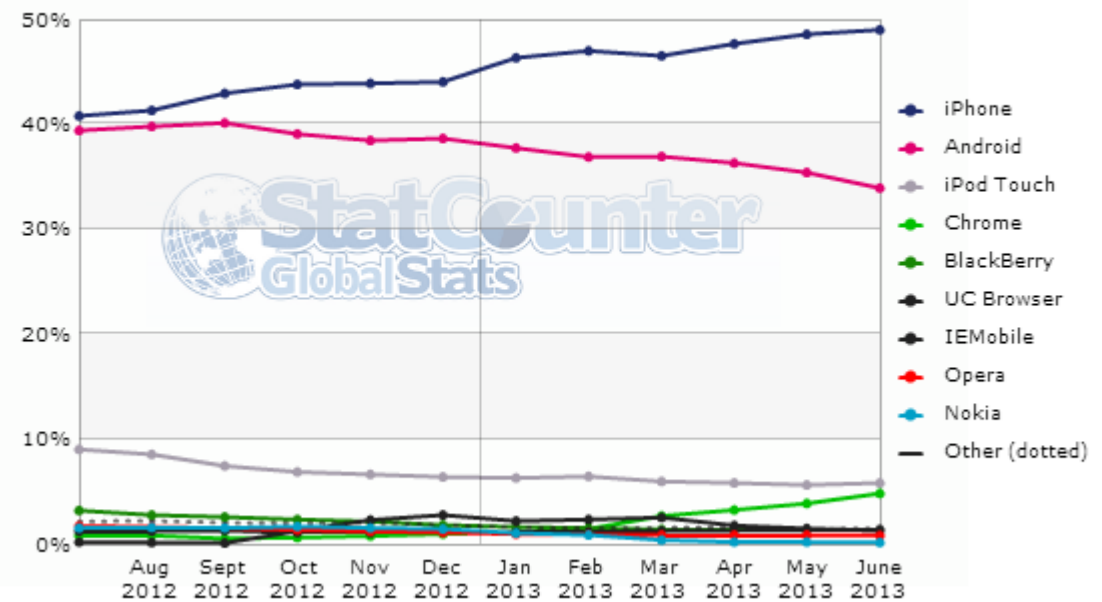
Worldwide: Android on 29.06% (up from 23.16% 12 months ago) leads worldwide in terms of mobile browser usage followed by Safari (iPhone and iPod Touch) 24.98% (almost unchanged from 24.99%). Opera is in third place on 16.06% (down from 19.41%). BlackBerry has declined to 3.11% (from 4.71%). Chrome may be worth watching. Just over a half per cent a year ago, it has risen to 3.23% and overtook BlackBerry in June 2013.

Note: Android refers to the stock browser that was traditionally preinstalled on all Android devices. Chrome refers to Chrome for Mobile.



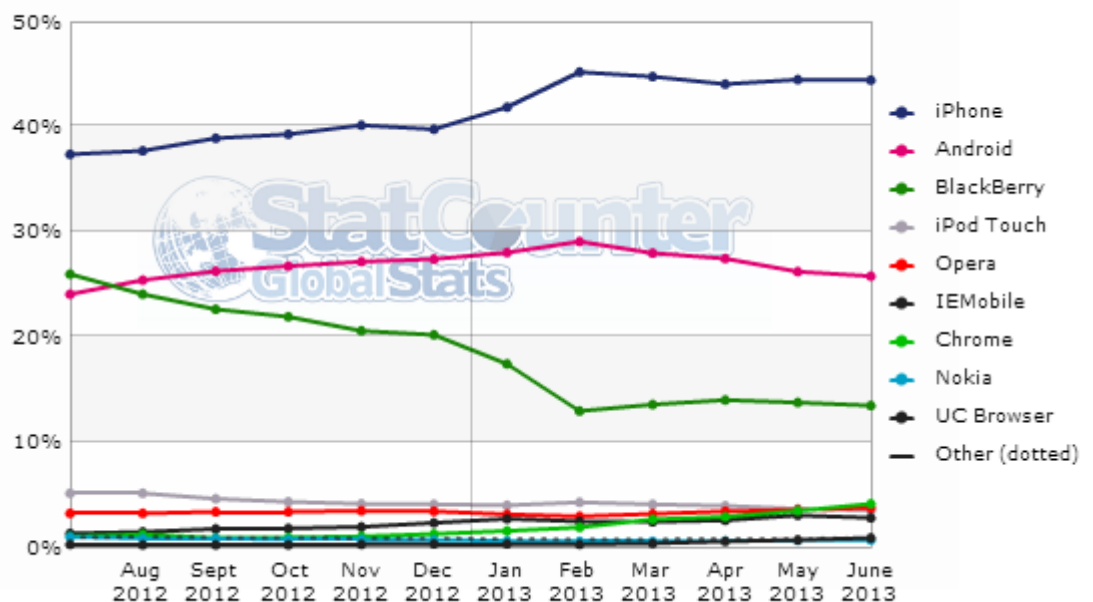
US: The US is rather different with Safari (iPhone and iPod Touch) the clear leader on 54.8% (up from 49.82%). Meanwhile Android has slipped to 33.93% (down from 39.38%). The steady rise of Chrome, suggested by the worldwide data is even more evident in the US. Chrome, up to 4.81% from 0.79%, overtook BlackBerry in March of this year. BlackBerry in the US has declined to 1.31% in June (down from 3.19%).

Top 9 Mobile Browsers in the United States from July 2012 to June 2013



UK: Safari (iPhone and iPod Touch) on 47.91% has increased its lead in the UK (up from 42.43%). Android in number two spot (25.77%) has also increased its usage share (up from 24.05%). BlackBerry is in third on a respectable 13.46%, although it has declined over the last 12 months from 25.97% and lost its number two spot to Android in August last. Chrome is also starting to make ripples, up to 4.09% from 1.0%.

Top 9 Mobile Browsers in United Kingdom from July 2012 to June 2013

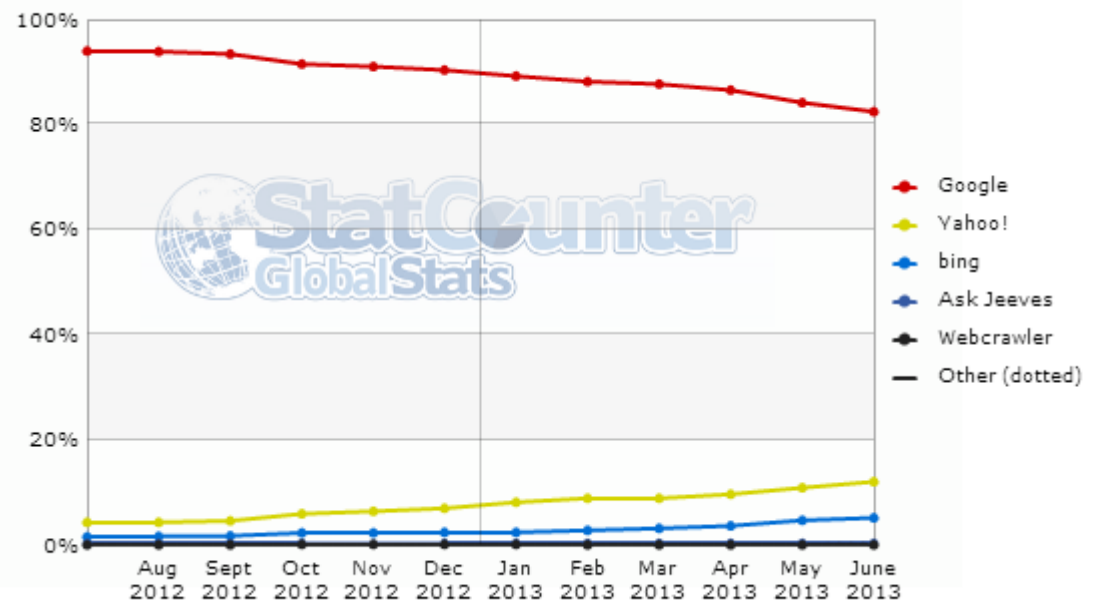


Mobile Search: Yahoo! and Bing start to eat into Google's dominance in US

Worldwide: Google's domination is very pronounced in the mobile space where it has 93.79% referral share worldwide (96.98% 12 months ago). Both Yahoo!, in second place up to 4.08% from 2.0% and Bing, up to 1.44% from 0.66%, have more than doubled their share, albeit from very low starting points.

US: Google has more of a battle on its hands in the US where it has dropped to 82.47% from 93.97% 12 months ago. Yahoo! has almost tripled to 12.01% from 4.24%. Bing has more than tripled to 5.13% from 1.49%.

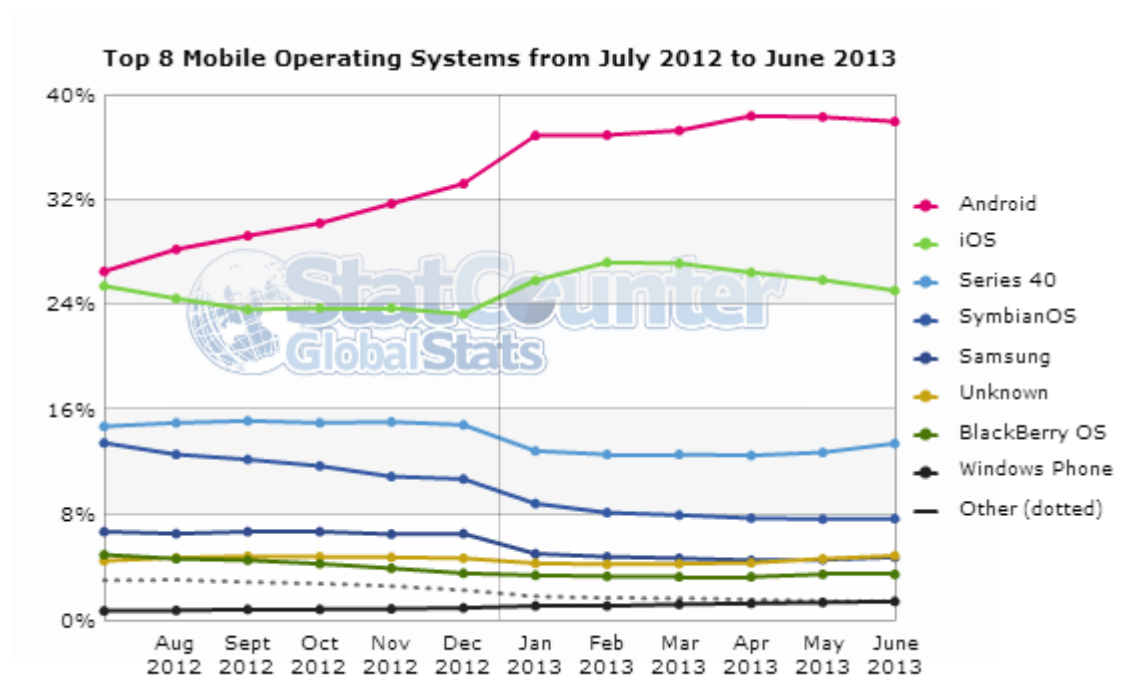
Top 5 Mobile Searches in the United States from July 2012 to June 2013



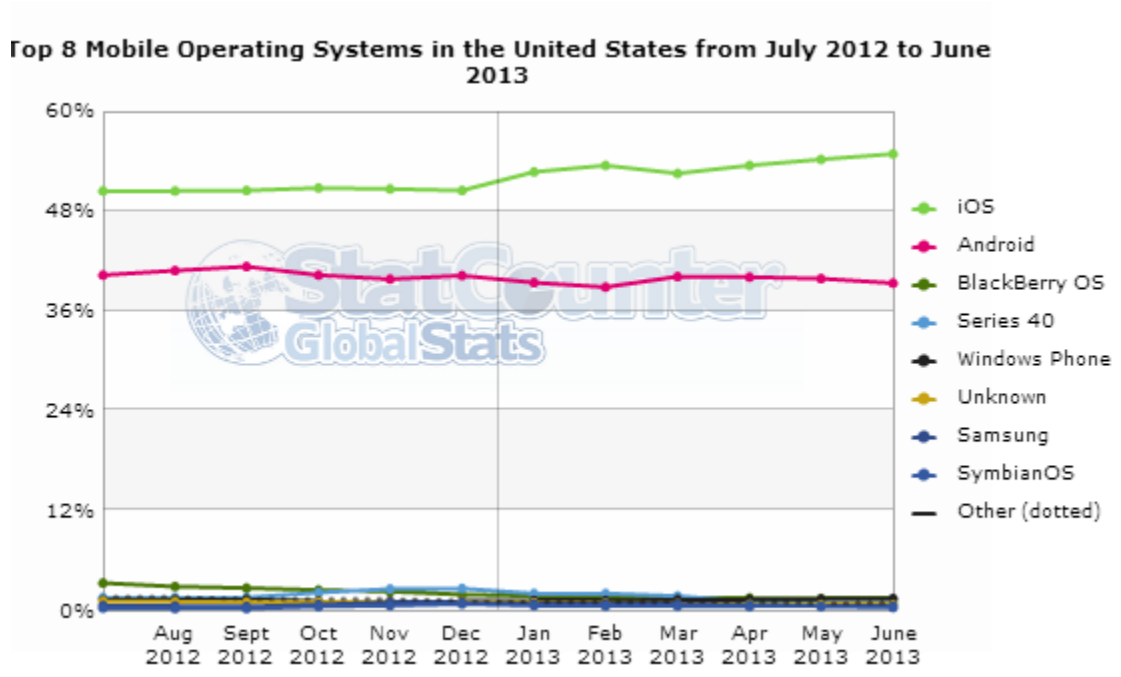
UK: In the UK Google has fallen from 97.26% to 92.21%. Yahoo! has increased to 6.32% from 1.8% a year ago. Bing has risen to 1.17% from 0.27%, while Ask Jeeves has declined from 0.67% a year ago to 0.24%.

Mobile Operating Systems: Android increases global lead but iOS number one in US and UK

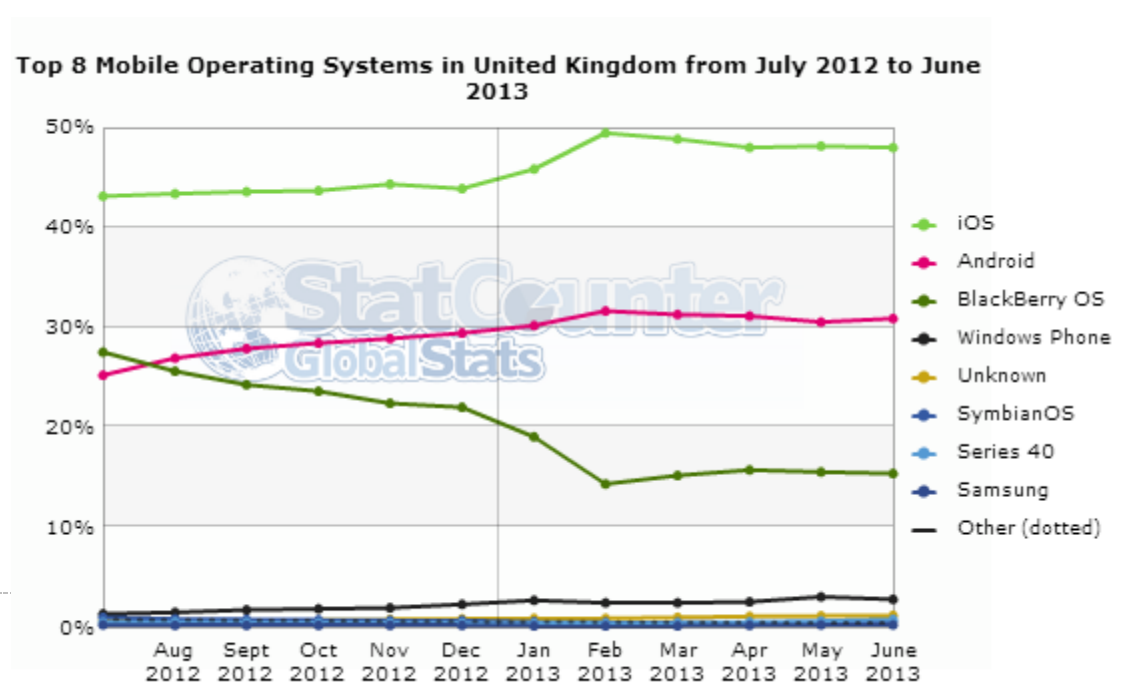
Worldwide: Android on 37.93% (up from 26.53% a year ago) has increased its lead over Apple's iOS (little changed from 25.41% a year ago to 25.09%). Nokia's Series 40 is in third place on 13.43% while its Symbian OS has declined to 7.69% from 13.47%, hardly unexpected in view of Nokia's strategic shift to Windows Phone. While Windows Phone has doubled over the year from 0.68% to 1.4%, it is still some way back in the pecking order in terms of internet usage. For example, it is behind BlackBerry OS which has declined to 3.46% from 4.96%.



US: In the US it is currently a stark two way fight between iOS (up to 54.85% from 50.43%) and Android (marginally down to 39.36% from 40.31%). At this stage nothing else figures above 1.5%.



UK: Both iOS (up to 47.97% from 43.13%) and Android (up to 30.88% from 25.18%) have increased usage share. This is largely at the expense of BlackBerry which still holds a highly respectable position in the UK on 15.34% (although down from 27.49%). Windows Phone, up to 2.77% from 1.28%, is showing more signs of traction than in the US, albeit from a low base.



Mobile v Non-Mobile: Non-mobile still dominates despite rise of mobile

Worldwide: There is no doubt about the rise of mobile devices in terms of internet usage, although their current perceived penetration may be exaggerated. Internet usage from non-mobile devices still dominates worldwide on 83.92% compared to 16.08% for mobile. That said, mobile is increasing rapidly and is up from 11.09% twelve months ago.

***Note:** StatCounter defines mobile as a pocket-sized computing device. Tablets are currently included in our non-mobile stats. Recognizing the increasing penetration of tablet devices, we have in beta mode new data which will identify tablet share in terms of internet usage. We plan to announce the first findings of this in the Autumn/Fall.*

US: Non-mobile internet usage also dominates in the US on 85.75% compared to 14.25% for mobile (up from 10.07%).

UK: The UK is very similar to the US with non-mobile still accounting for 85.54% of internet usage compared to 14.46% for mobile (up from 11.75%)

Appendix

Methodology: StatCounter is a web analytics service. StatCounter code is installed on more than 3 million websites globally. These sites cover various activities and geographic locations. Every month, we record over 15 billion page views to these sites.

We calculate our Global Stats on the basis of these billions of page views per month, by people from all over the world onto our 3 million+ member sites. By collating our data in this way, we track the activity of third party visitors to our member websites.

Note that we do not measure sales/shipments/downloads. We measure internet usage trends. For each page view, we analyse the browser/operating system/screen resolution/geolocation (via the ip address) and we establish if the page view is from a mobile device (via the user agent information). We summarize all this data to get our Global Stats information.

Specifically:

We measure the referral influence of social media sites by analyzing every page view referred by a social media site. "Referral Influence" is a measure of the amount of referral traffic generated by a social media site. The more referral traffic from a social media site, the higher it will rank in our Global Stats data.

We measure the referral share of search engines by analyzing every page view referred by a search engine. "Referral Share" measures the proportion of search engine referrals received from a given search engine. The more search referrals from a search engine, the higher it will rank in our Global Stats data.

We measure the usage share of browsers. "Usage Share" measures the extent to which a browser is actually used. The more usage a browser receives, the higher it will rank in our Global Stats data. Note that we base our data on page views rather than individual visitors as we strongly believe this is a more accurate reflection of internet usage (for more on why see our video explanation: http://www.youtube.com/watch?v=J_OO2rcZ7bU).

Usage share of Browser Versions, Operating Systems and all other stats is calculated in the same manner as described above.

We define a mobile device as a pocket-sized computing device, typically having a display screen with touch input or a miniature keyboard. Tablets, while portable, are not considered mobile devices according to this definition.

In June 2013, our global sample consisted of 17.5 billion page views (US: 4.2 billion, UK: 776 million); 2.1 billion of these were search engine referrals (US: 370 million, UK: 87 million); 328 million of these were social media referrals (US: 117 million, UK: 14 million).

How to use StatCounter Global Stats



1. Select a statistic – choose Browser, Browser Version, Mobile Browser, Operating System, Mobile OS, Search Engine, Mobile Search etc.
2. Choose a region – pick Worldwide or any individual country or continent.
3. Select a time period – select a tab for Daily/Weekly/Monthly/Quarterly/Yearly then set a specific period.
4. Pick the graph type – line graph, bar graph or map.