TRENDS

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Who's Changed Web Browsers, And Why?
And What Keeps The Majority Of Web Users Loyal To Their Browsers?

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EXECUTIVE SUMMARY

Microsoft's Internet Explorer (IE) has been the king of the Web browser world since the original Netscape gave up the ghost, but alternative browsers — led by Netscape heir Firefox — have tempted some users to switch during the past year. The main reasons users say they change: better popup blocking, security, speed, and browsing features. But a large majority of users are loyal to their browsers. To make the next big leap in browser innovation — and convince the skeptical majority to flip — browser builders need to get past the lazy one-upsmanship of the status quo and fundamentally rethink how real people navigate and manipulate Web content.

INTERNET EXPLORER IS STILL THE PLAYER TO BEAT

Forrester surveyed Web-savvy North American households to find out which browsers they used most often, and the results were predictable: Internet Explorer leads with nearly 60% market share, followed distantly by AOL, which picks up another 18% (see Figure 1). Firefox, Opera, Safari, and other minority stakeholders battle for the remaining scraps of the market.
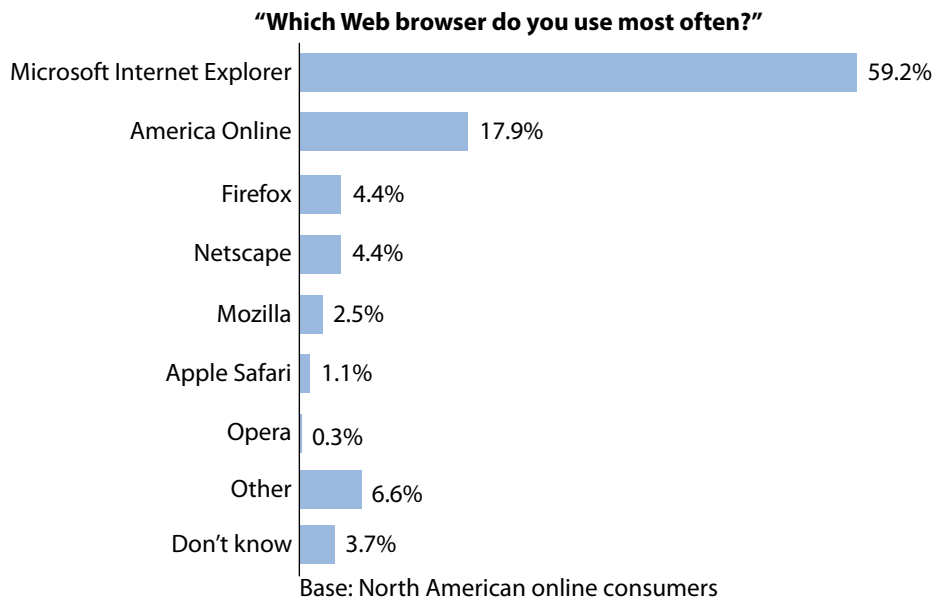
New Browsers' Progress Is Slow, Especially Among Older Users

By some measures, Firefox has made great strides in the browser market share battle, rocketing to more than 130 million downloads in just over a year.[1] But when we asked North American households if they'd switched their primary Web browser over the past year, only 13% said they had — far from a stampede (see Figure 2). Even 18 to 34 year olds — a group that has virtually grown up on the Web — only switched at a rate of 17%. Why are users so loyal to their browsers?

- **Core browser functionality looks the same to most users.** At the end of the day, a Web browser's job is to faithfully retrieve and render Web pages stored on remote servers. That means that 90% of what users see in their browser window at any given time — the Web page itself — should look exactly the same no matter which browser they're using. Given that fact, it's understandable that casual Web users have a hard time getting excited about new browsers.

- **Differentiating features are redundant with standalone products.** The two most commonly cited reasons for making a browser switch — popup protection and better security — are issues that have spawned entire standalone software markets (see Figure 3). For these features, browsers compete with literally hundreds of best-of-breed products like Webroot Pop-up Washer and Norton Internet Security.[2] Users looking for the best defenses against popups and security problems are often better served by looking beyond Web browsers.

- **Alternative browsers have proven vulnerable.** Last year, Firefox was the primary beneficiary of users' browser hopping. It reeled in 30% of Web users who ditched their old browser, which was most often Internet Explorer (see Figure 4). But last year also saw Firefox, the browser that was pitched as a solution to IE users' security woes, prove vulnerable to heap overflows, malicious remote software installation, and the infamous IDN exploit that threatened nearly every browser *except* Internet Explorer. With Firefox and other new browsers failing to deliver the promised security panacea, users had even less reason to defect from IE in 2005.

Figure 1 Internet Explorer Is The Most Common Browser In North America

"Which Web browser do you use most often?"

| Browser	Percent
Microsoft Internet Explorer	59.2%
America Online	17.9%
Firefox	4.4%
Netscape	4.4%
Mozilla	2.5%
Apple Safari	1.1%
Opera	0.3%
Other	6.6%
Don't know	3.7%

Base: North American online consumers
Source: Consumer Technographics® Q4 2005 North American Healthcare, Customer Experience, And Retail Online Survey

Source: Forrester Research, Inc.

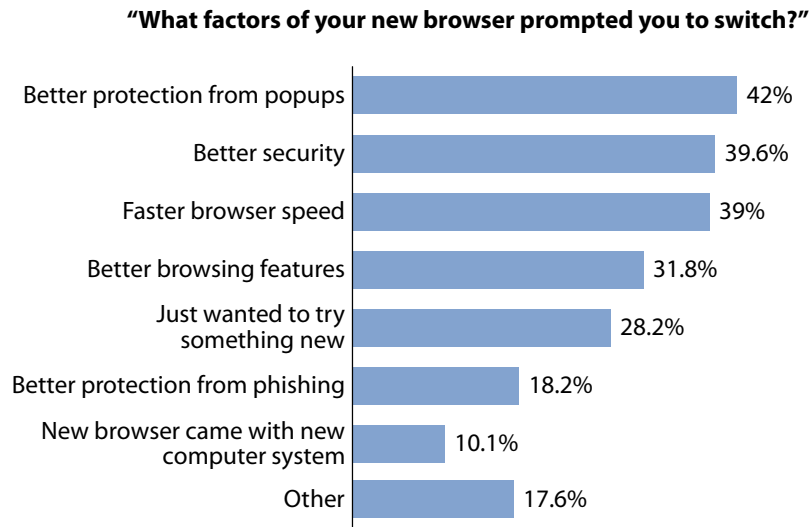**Figure 2** Younger Web Users Switched More Often, But Still Rarely

"In the past year, have you switched to using a new Web browser?"
(Percent who answered yes)
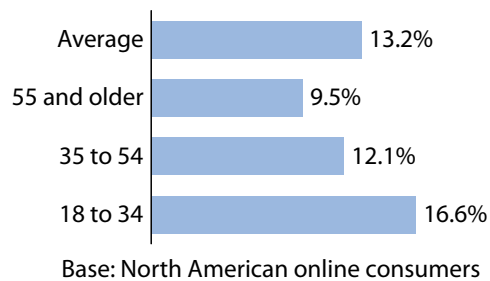
	Percent
Average	13.2%
55 and older	9.5%
35 to 54	12.1%
18 to 34	16.6%

Base: North American online consumers
Source: Consumer Technographics® Q4 2005 North American Healthcare, Customer Experience, And Retail Online Survey

Source: Forrester Research, Inc.

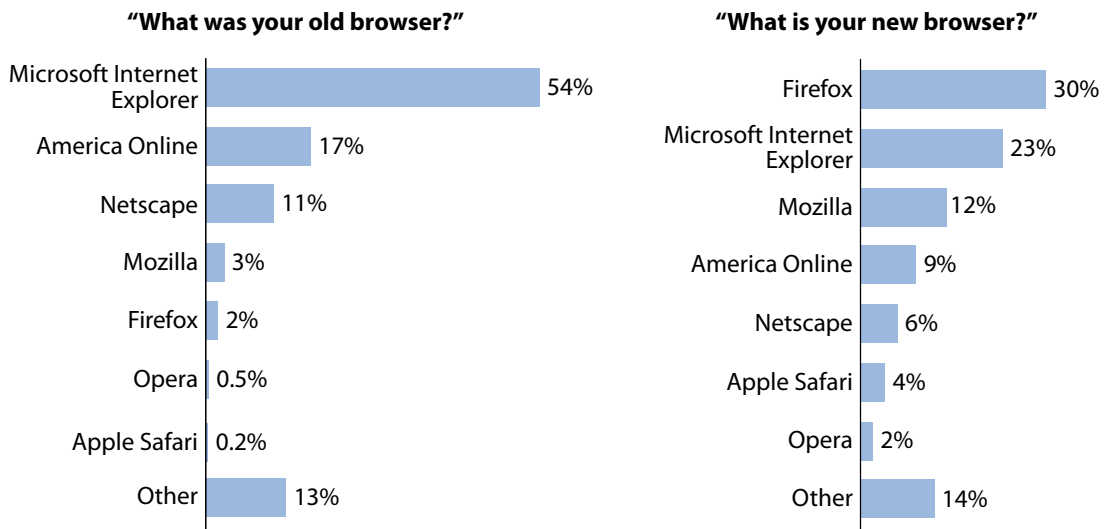**Figure 3** Users Switch For Popup Blocking, Security, Speed, And Browsing Features

"What factors of your new browser prompted you to switch?"

Factor	Percentage
Better protection from popups	42%
Better security	39.6%
Faster browser speed	39%
Better browsing features	31.8%
Just wanted to try something new	28.2%
Better protection from phishing	18.2%
New browser came with new computer system	10.1%
Other	17.6%

Base: North American online consumers who switched Web browsers

Source: Consumer Technographics® Q4 2005 North American Healthcare, Customer Experience, And Retail Online Survey

Source: Forrester Research, Inc.

Figure 4 The Net Movement: From IE To Firefox

"What was your old browser?"

Browser	Percentage
Microsoft Internet Explorer	54%
America Online	17%
Netscape	11%
Mozilla	3%
Firefox	2%
Opera	0.5%
Apple Safari	0.2%
Other	13%

"What is your new browser?"

Browser	Percentage
Firefox	30%
Microsoft Internet Explorer	23%
Mozilla	12%
America Online	9%
Netscape	6%
Apple Safari	4%
Opera	2%
Other	14%

Base: North American online consumers who switched Web browsers

Source: Consumer Technographics® Q4 2005 North American Healthcare, Customer Experience, And Retail Online Survey

Source: Forrester Research, Inc.

RECOMMENDATIONS

WITHOUT REAL INNOVATION, BROWSER CHOICE HARDLY MATTERS

The sprawl of Web content and apps, both inside and outside corporate firewalls, has made Web browsers one of the most common — and most important — software apps in the world. Yet Internet Explorer's long-term domination of the space — along with the corporate sector's desire for stability — has slowed browser innovation to a crawl. The time is ripe for a bottom-up rethink of Web browsers, and it doesn't even have to be that painful. To start:

- **Browser builders: Stop navel-gazing and *innovate*.** To make any serious headway against Internet Explorer's strong position, upstarts like Mozilla and Opera need to trash tradition and fundamentally rethink how real people experience the Web. Would-be next-generation browser builders should forgo upheavals that require re-coding of existing Web pages and focus instead on innovative client-side features — like tabbed browsing — that help users browse existing, standardized Web content better. The best place to find the seeds of these new ideas: ethnographic research with real live Web users.[3] To stop the slow erosion of its monopoly, Microsoft should take the same advice and focus on dreaming up a real next-generation browser, not just catching up to the innovations that Firefox brought to market last year.

- **Web developers: Stick to content standards, both official and de facto.** Browser-native user interface languages like Firefox's XUL and Microsoft's upcoming XAML are interesting, but they are a long way from being ubiquitous or standardized. Firms that develop new Web apps based on these newer, richer interface technologies will have to make a choice: serve a limited audience or develop multiple versions using different tools for different slices of the overall audience. Until the next generation of Web interface languages develops into a new standard, firms should stick to accepted standards like HTML and JavaScript for most basic Web development, and they should favor the widely installed Flash player or standards-based Ajax over still-unproven rich Internet app platforms with smaller (or nonexistent) installed bases.

ENDNOTES

[1] Source: Firefox community marketing (http://www.spreadfirefox.com).

[2] The "Pop-Up Blockers" section of CNET's Download.com site lists 161 separate products available for download (http://www.download.com/Pop-Up-Blockers/3150-7786_4-0.html?tag=dir).

[3] Our Customer Experience Peer Research Panel participants plan on increasing their own spending on customer research in 2006. One result: Firms that specialize in ethnographic research methods like job shadowing and interviewing will be busy — and expensive — this year. To avoid waiting in line for limited outside research experts, next-generation browser builders should consider hiring dedicated user research staff. See the February 3, 2006, Trends "Customer Experience Spending Booms In 2006."