

Google  
Chrome BETA



## Google Chrome – The Market's Initial Reaction as Overheard Through Online Media

September, 2008

grail research  
a division of Integreon

# Market Reaction

## Research Overview

*Grail Research Approach: Using Online Media to gather valuable insights for newly-launched products and technologies*

- ➔ The launch of new technologies and devices generates a wealth of instantaneous feedback
- ➔ While companies and investors assign great value to this feedback, it is generally scattered across a multitude of online sources and gaining a comprehensive, accurate view can be quite time-intensive
- ➔ Grail Research leverages a proprietary approach which combines the benefits of technology and experienced researcher interpretation to provide the early insights organizations need
- ➔ This document highlights insights gleaned through online media during Google Chrome's first nine days of beta availability

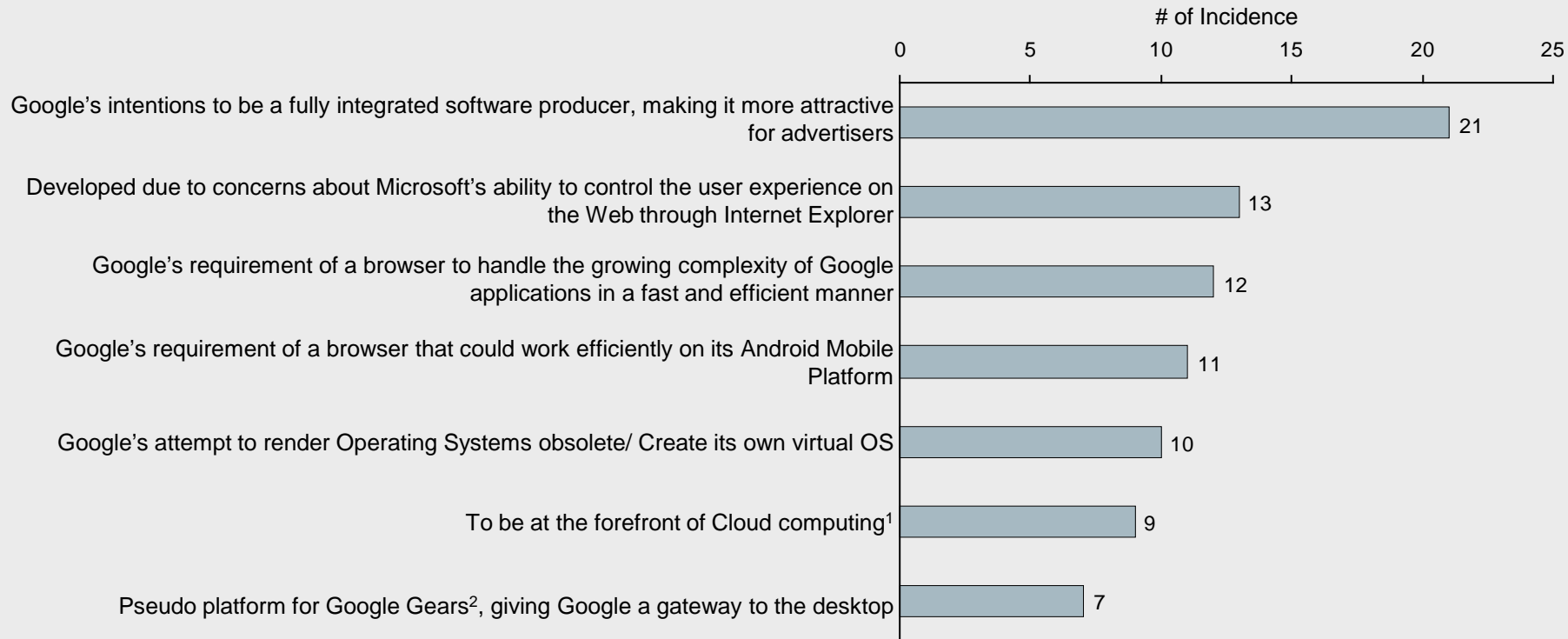
# Market Reaction

## Why Did Google Launch Chrome?

*Most in the online community believe Chrome to be vital in Google's quest to be an 'Integrated Service Provider' and to break Microsoft's influence over the online experience*

### Frequency Analysis – 'Rationale/Strategy'

Sample Size: 40: Articles/Blogs



Note: Frequency analyses conducted during Sept 8 - Sept 11, 2008, using articles/blogs published on/before Sept 11, 2008; <sup>1</sup>Cloud computing refers to running applications online and not on the desktop, using Data Centers known as 'clouds', <sup>2</sup>Google Gears allows web applications to interact with the desktop and store data locally on the system

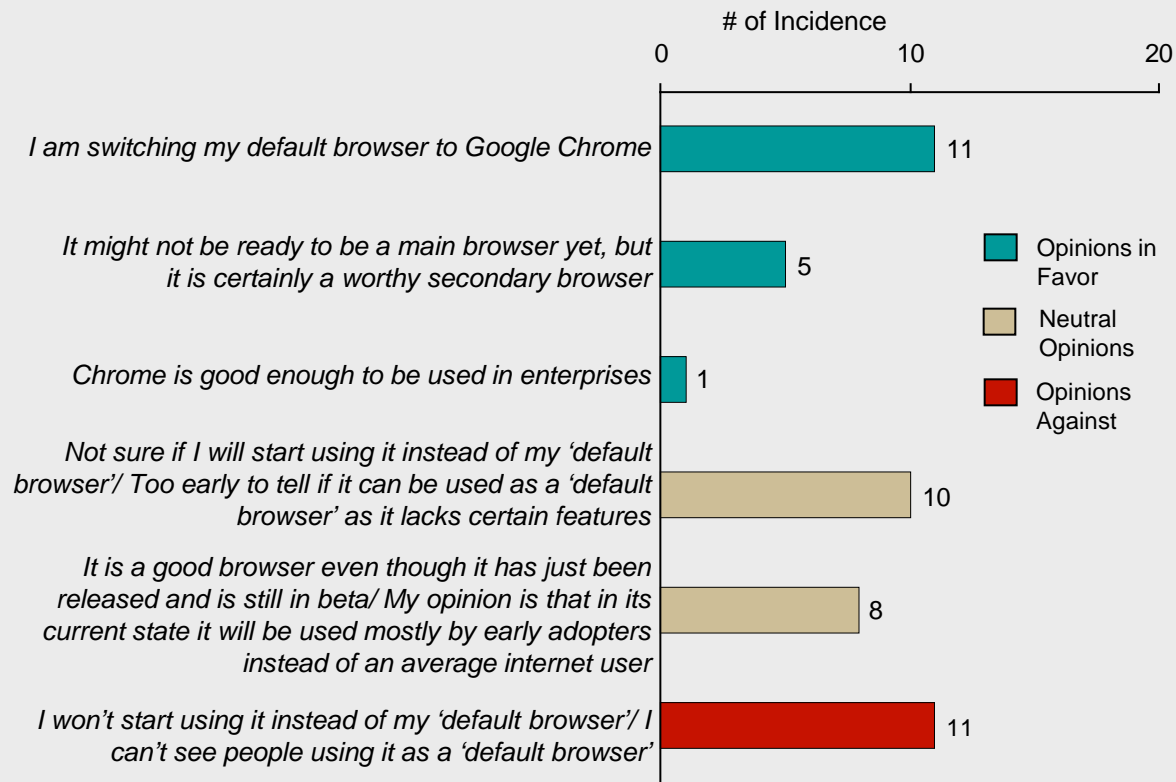
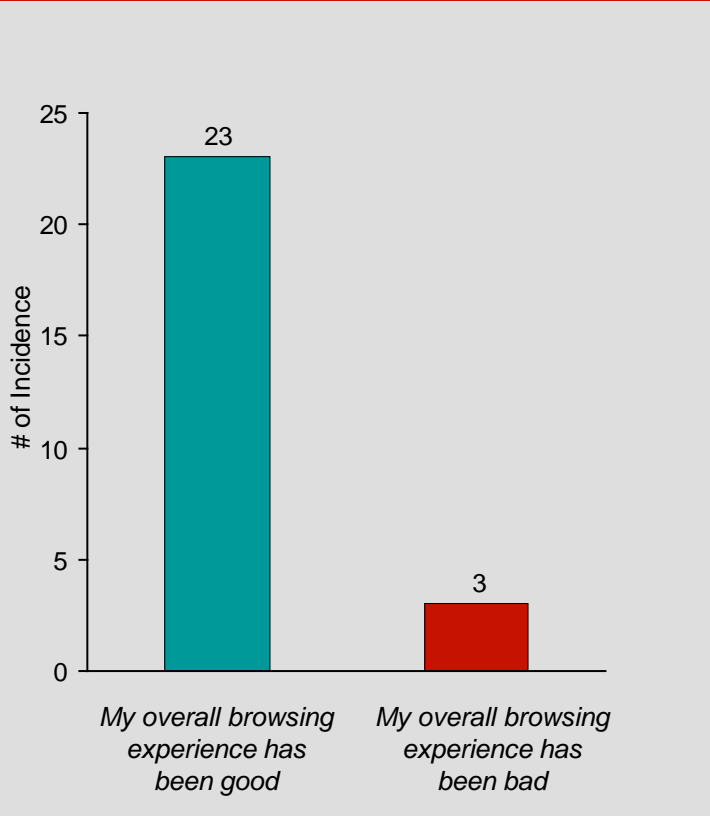
Source: Press Releases, Articles and Blogs, Grail Research Analysis

# Market Reaction

## Chrome's Initial Reception

Most users report having good initial experiences with Chrome. However, they have mixed opinions on whether Chrome can replace their primary browser

### Frequency Analysis – 'Reception' (Sample Size: 40 Articles/Blogs Referred)



Note: Frequency analysis conducted during Sept 8 - Sept 11, 2008, using articles/blogs published on/before Sept 11, 2008

Source: Press Releases, Articles and Blogs, Grail Research Analysis

# Market Reaction

## Advantages and Concerns About Chrome

*While its speed and interface design are considered to be the major advantages, missing features/compatibility issues and privacy concerns are Chrome's major drawbacks*

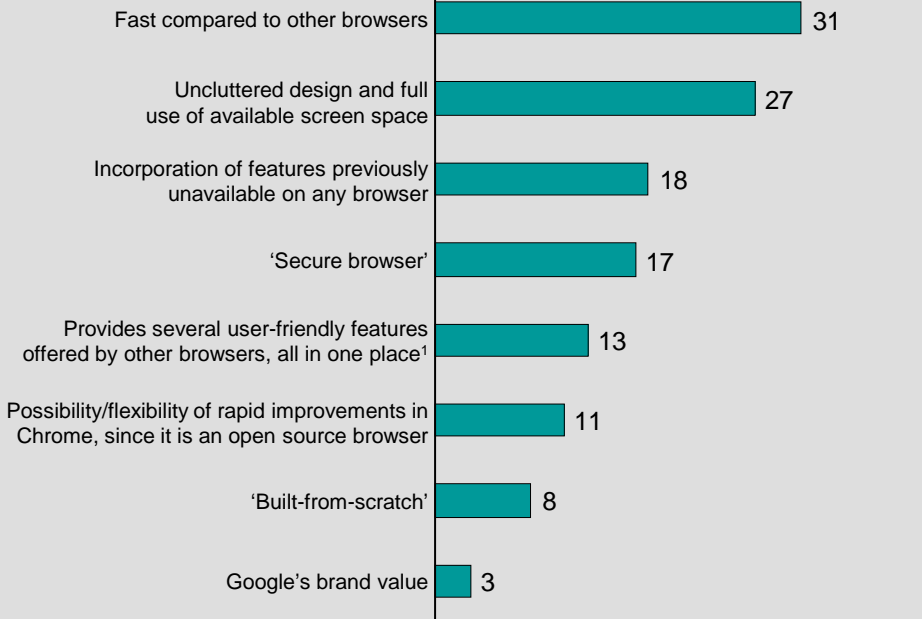
### Frequency Analysis – 'Key Advantages'

### Frequency Analysis – 'Google Chrome Concerns'

Sample Size: 100 Articles/Blogs Referred

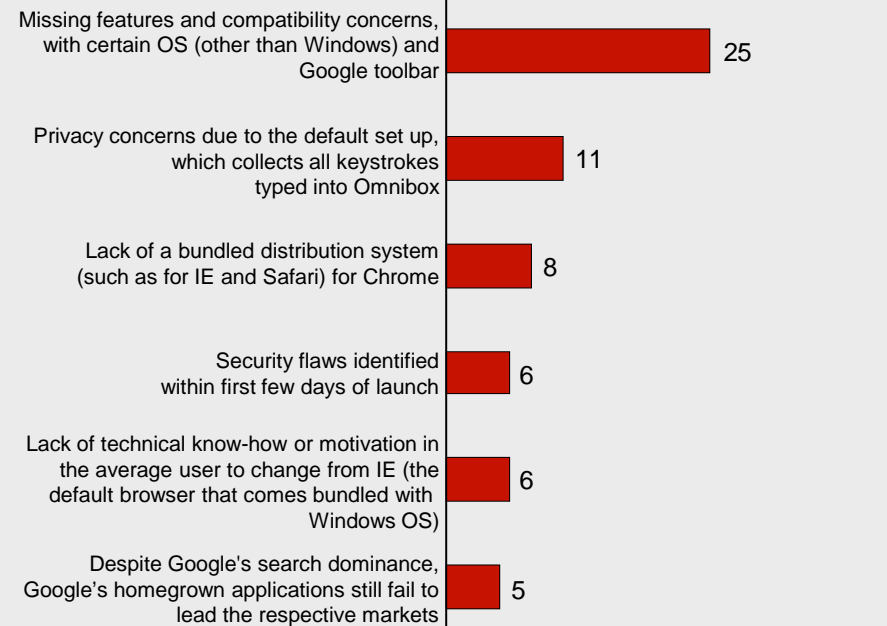
# of Incidence

0 10 20 30 40



# of Incidence

0 10 20 30 40



Note: Frequency analyses conducted during Sept 8 - Sept 11, 2008, using articles/blogs published on/before Sept 11, 2008; <sup>1</sup>These features include Incognito Mode (available on Safari, IE 8 etc), Smart Address Bar (Firefox and IE 8), Custom Panel Start Page (Opera and Firefox), Tab detachment/attachment (Opera and Safari) etc.

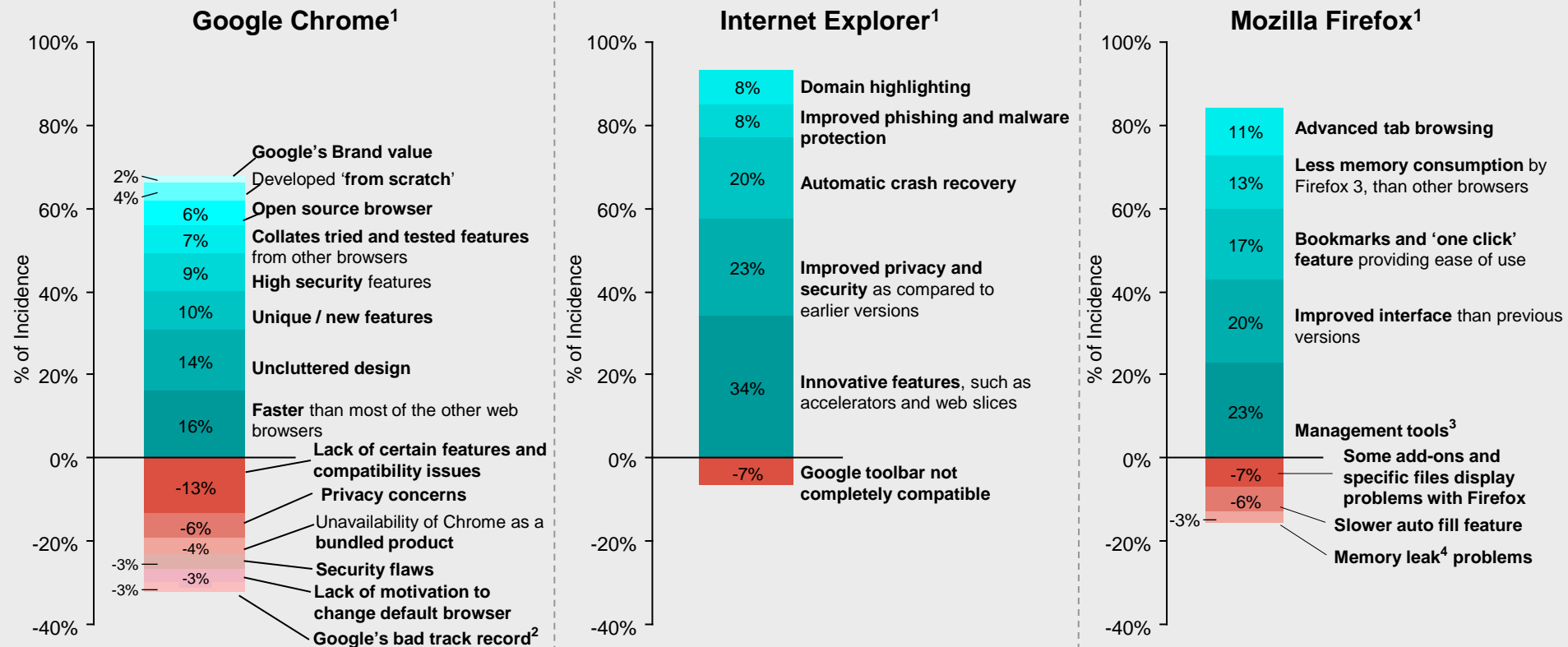
Source: Press Releases, Articles and Blogs, Grail Research Analysis

# Market Reaction

## Competitive Overview

Following the release of Chrome, market reaction highlighted IE's and Mozilla's innovative/improved features and offered few negative comments about the incumbents

### Frequency Analysis – 'Advantages and Disadvantages'



Note: Frequency analysis conducted during Sept 8 - Sept 11, 2008, using articles/blogs published on/before Sept 11, 2008; <sup>1</sup>Sample Size = 100 articles/blogs for Chrome, 40 articles/blogs for Internet Explorer and 40 articles for Mozilla; <sup>2</sup>Despite Google's search dominance, Google's homegrown applications still fail to lead the respective markets; <sup>3</sup>Download manager, Add-on manager and Password manager; <sup>4</sup>A memory leak occurs when memory is allocated in a program and is never returned to the operating system

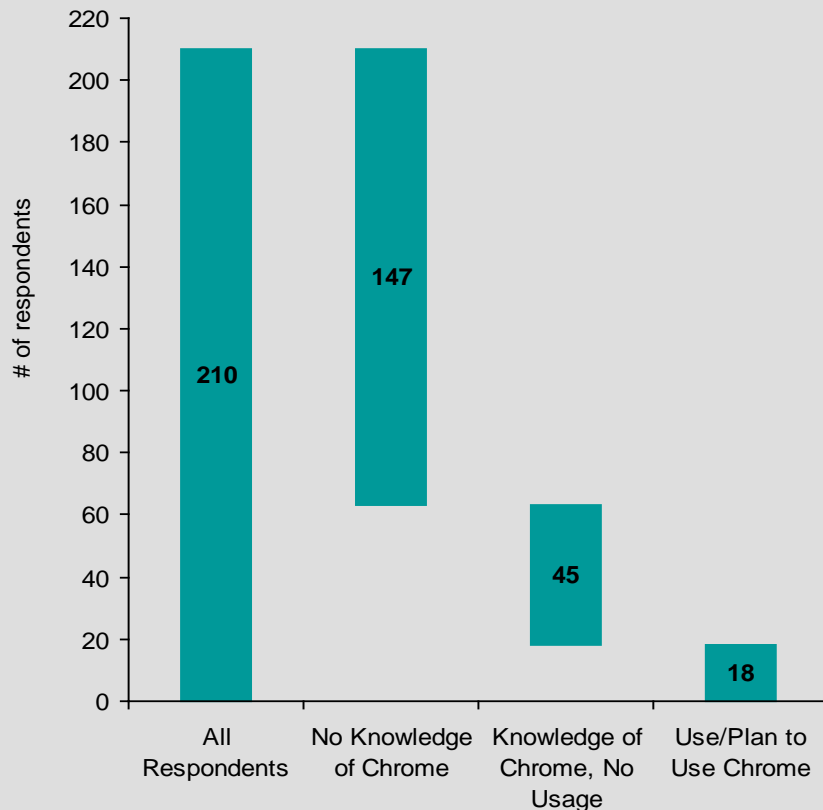
Source: Press releases, Articles and Blogs, Grail Research Analysis

# Market Reaction

## Online Survey

To learn more about specific aspects of the Chrome experience, a rapid-cycle online survey was launched

### Online Survey – Google Chrome Awareness and Outlook



- Quick-cycle survey conducted Thursday, September 11<sup>th</sup>, 9 days after launch
- “General” US online user population was surveyed; 210 respondents
- Sample size too small to draw meaningful conclusions due to screening criteria (but that in and of itself is interesting):
  - 70% of survey respondents had not even heard about Google Chrome
  - Less than 30% of respondents who knew about Chrome had used it or planned to use it

Note: Sample Size is NOT large enough to be statistically significant or to draw meaningful conclusions

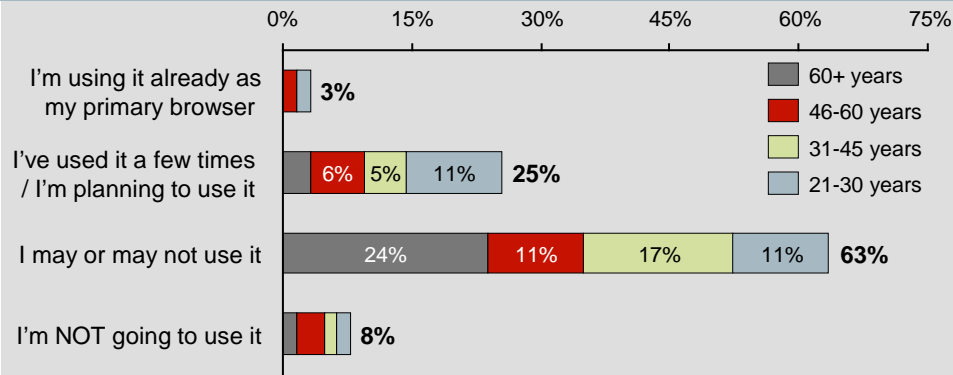
Source: Based on a quick-cycle online survey conducted on September 11, 2008 of 63 respondents who were aware of Google Chrome

# Market Reaction

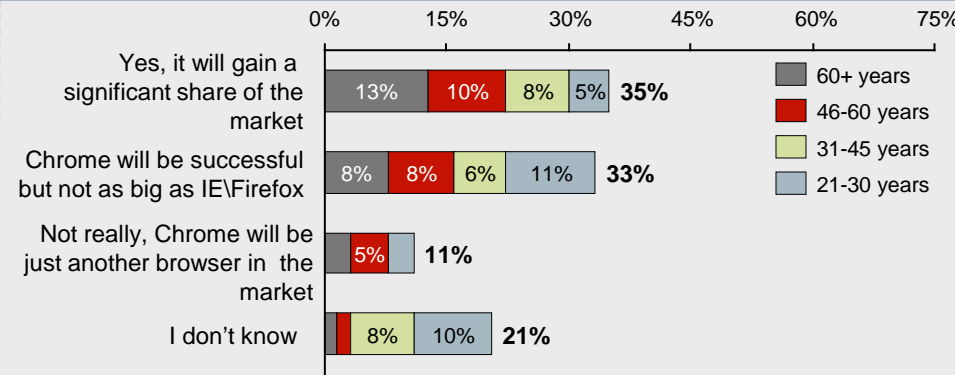
## When Asked Directly...

Two-thirds of all respondents think Chrome will be successful; nearly half of IE users think Chrome will gain significant market share<sup>1</sup>

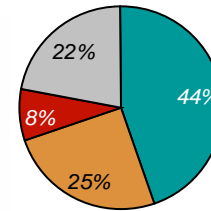
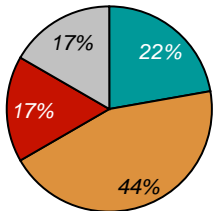
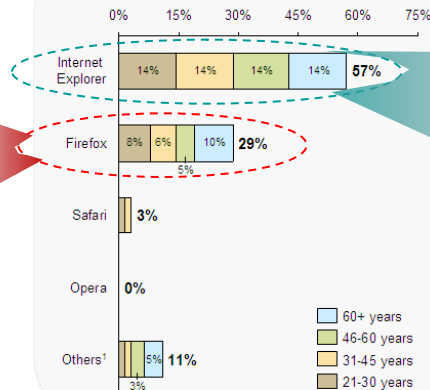
### Do you plan to use it (Chrome)? (choose one)



### Do you think Chrome will be successful in future? (choose one)



### Which browser do you currently use (primarily)? (choose one)



### Do you think Google Chrome will be successful in future?

- Yes, it will gain a significant share of the market
- Chrome will be successful but not as big as IE or Firefox
- Not really, Chrome will be just another browser in the market
- I don't know

Note: <sup>1</sup>Sample Size is NOT large enough to be statistically significant or to draw meaningful conclusions

Source: Grail Research quick-cycle online survey conducted on September 11, 2008 of 63 respondents who were aware of Google Chrome

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## Commentary on the Future of Chrome

*Although many in the online community view Chrome as a threat to established browsers, they do not anticipate it will overtake IE's lead in the market*



**Users consider Chrome to be a threat even to the established browsers in the market, such as Firefox...**

**...but do not expect Chrome will be able to gain control of the market from Internet Explorer**

- *"The big loser in the Google Chrome browser sweepstakes? Mozilla's Firefox. While Mozilla has done a miraculous job of building its brand and share, Google's brand dwarfs it and has wider awareness among the general public"*  
– Sean Michael Kerner, InternetNews.com, Sep 2008
- *"With Firefox having gained approximately 20% percent market share over the past 4 years, we believe Google Chrome could gain 15-20% share within 2 years "*  
– Douglas Anmuth, Analyst, Lehman Brothers, Tech Crunch, Sep 2008
- *"Turns out that it's going to be Apple and Google who will usher in the future of browsers, and who will get to determine just what that future of browsers is going to look like"*  
– Chris Messina, Factory City, Sep 2008
- *"By combining Android and Chrome, Google has successfully managed to join the ranks of Microsoft, Apple..... as an entity capable of providing an operating system/browser couple"*  
– Desire Athow, ITProPortal.com, Sep 2008
- *"Google won't hold a candle to Microsoft's dominance of the market, but it will take Firefox's place as the enthusiast's browser of choice in the coming years"*  
– Nick Mokey, Digital Trends, Sep 2008
- *"This is no longer about browser but about the entire marketplace spread between desktop, mobile and web. With Chrome, Google's taking a shot at Windows, not paltry Internet Explorer"*  
– Sachendra Yadav, Sachendra's Blog, Sep 2008
- *"Of course, IE 8 will eventually ship as part of the next Windows, a fact that virtually guarantees Microsoft's influence will continue to be felt in the next phase of the Web's evolution"*  
– Svetlana Gladkova, Profy.com, Sep 2008

Note: Some quotes have been altered slightly to fix typos and grammar errors

Source: Profy.com, Factory City, Digital Trends, InternetNews.com, Tech Crunch, Sachendra's Blog, ITPro Portal



## For More Information Contact:

- **Chip Brewer**  
(cbrewer@grailresearch.com)
- **Zachary Wills**  
(zwills@grailresearch.com)

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