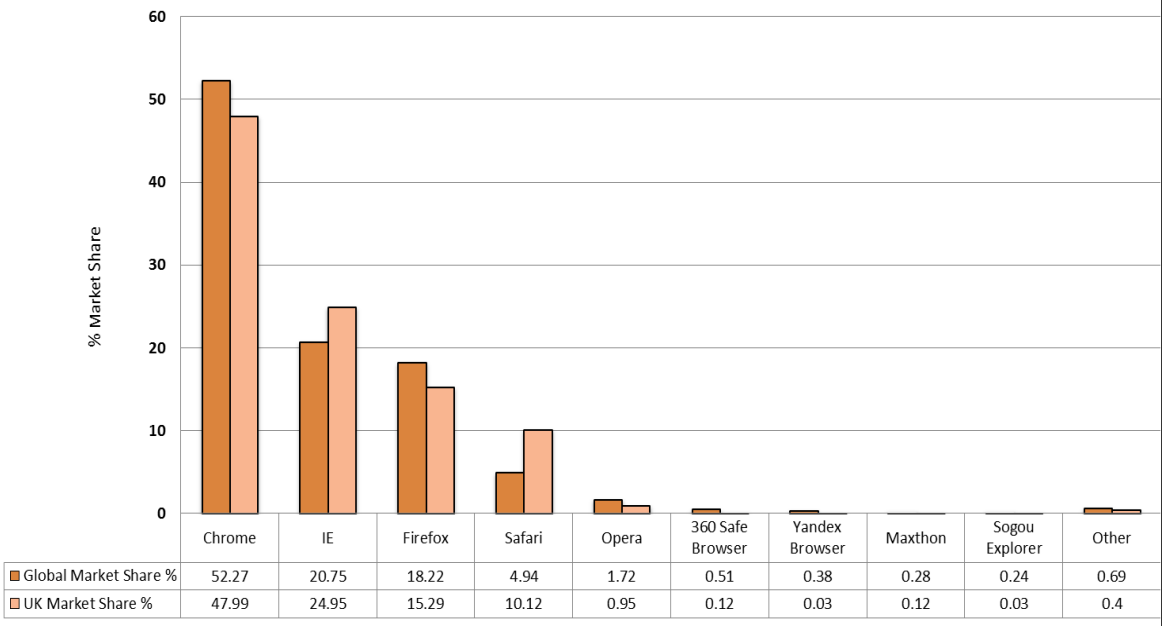
Omni-Channel Market Trends UK and Global – February 2015

Monthly analysis of Omni-Channel market trends for UK and Global

DESKTOP BROWSER



	Chrome	IE	Firefox	Safari	Opera	360 Safe Browser	Yandex Browser	Maxthon	Sogou Explorer	Other
Global Market Share %	52.27	20.75	18.22	4.94	1.72	0.51	0.38	0.28	0.24	0.69
UK Market Share %	47.99	24.95	15.29	10.12	0.95	0.12	0.03	0.12	0.03	0.4

Chrome continues to dominate the worldwide and UK Browser market; increasing share from 51.72% to 52.27% globally, and from 47.05% to 47.99% in the UK. Conversely IE has seen its share dip both globally and in the UK; down from 21.16% to 20.75% (global) and from 26.28% to 24.95% (UK). This is an indication that, whilst IE11 has moved towards a 'leaner' look and improved performance, continued platform compatibility restrictions may be leading to clients moving away from IE and towards other browsers such as Chrome.

Firefox had a mixed month, increasing share from 15.12% to 15.29% in the UK, but has dipped from 18.7% to 18.22% globally. The Studio Testing effort will continue to concentrate on the top four browsers; Chrome, IE, Firefox and Safari. The SAF (Sogeti Automation Framework) supports the top 5 browsers above.

Microsoft will soon be bringing out a new browser (along with Windows 10) called 'Spartan'; as of early-March the Studio are starting to download and evaluate a trial version of Windows 10.

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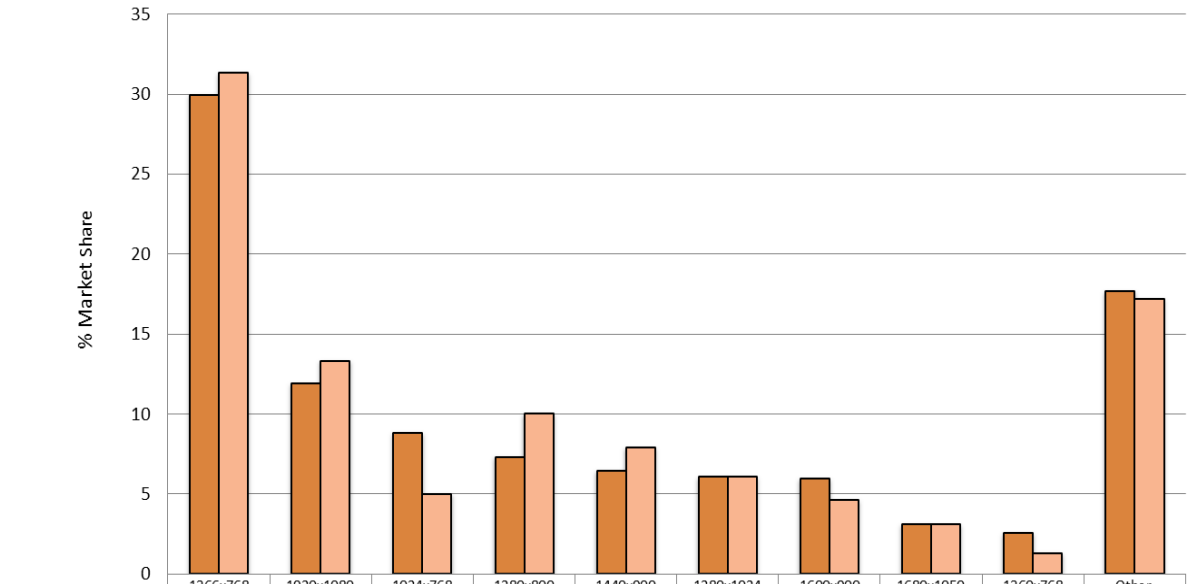
DESKTOP SCREEN RESOLUTION



	1366x768	1920x1080	1024x768	1280x800	1440x900	1280x1024	1600x900	1680x1050	1360x768	Other
Global Market Share %	29.99	11.94	8.84	7.34	6.46	6.08	5.96	3.12	2.57	17.70
UK Market Share %	31.37	13.34	5.02	10.03	7.92	6.08	4.62	3.10	1.31	17.21

The HD desktop screen resolution (1366x768), with an aspect ratio of 16:9, remains the most dominant format both globally and in the UK, although the usage share dropped slightly in Feb-15, from 30.28% to 29.99% globally, and from 31.53% to 31.37% in the UK. The second most dominant size, 1920x1080, has increased share slightly in Feb from 11.85% to 11.94% (global) and from 13.18% to 13.34% (UK), it appears manufacturers are using 1920x1080 as the 'standard' on new model and the trend could be attributed to kit replacement.

We also see gradual ups and down in the rest of the screen sizes between Jan-15 and Feb-15 figures; the 3rd most used global screen resolution (1024x768) has increased share from 8.69% to 8.84%. However, in the UK the increase has only gone from 5.00% to 5.02%, leaving 1280x800 as the 3rd most popular UK screen (even though this saw a slight decrease usage from 10.05% to 10.03%.

We suggest that Testing effort should be prioritised in the order of the aspect ratios of; 16:9, 16:10 and 4:3 accordingly. Sogeti Studio is aiming to continue factoring these screen sizes into testing for clients. The Studio will continue to monitor these trends to see if the above trend continues to grow.

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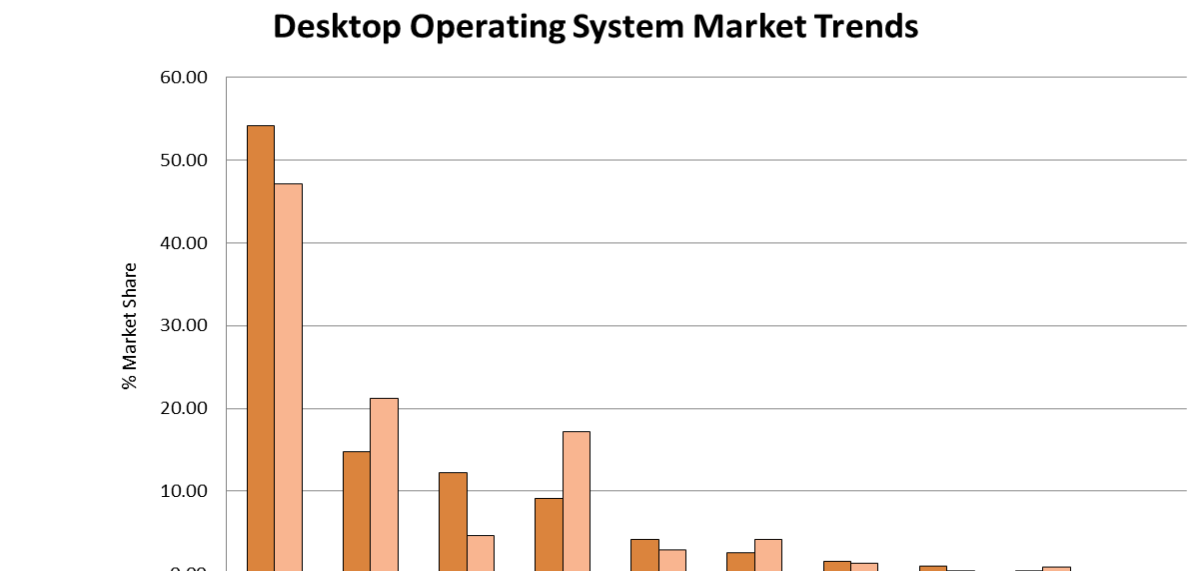
DESKTOP OPERATING SYSTEM



	Win7	Win8.1	WinXP	OS X	Win8	WinVista	Linux	Unknown	Chrome OS	Other
Global Market Share %	54.13	14.78	12.23	9.09	4.13	2.53	1.55	0.94	0.34	0.28
UK Market Share %	47.18	21.16	4.62	17.19	2.94	4.14	1.32	0.41	0.77	0.27

For desktop, the Windows operating systems (OS) continue to dominate the market in Feb-15; however Windows 7 share dipped during the month, from 50.55% to 47.18% in the UK. The threat to Win7 comes from Win8.1 with a UK monthly increase from 12.14% (Jan-15) to 21.16% (Feb-15).

Globally, however, Win7 dipped very slightly from 54.67% to 54.13%, with Win8.1 increasing from 14.27% to 14.78%. The UK increase in Feb-15 for Win8.1 meant that OS X moved down to 3rd most popular in the UK, even though it increased from 15.64% to 17.19% between Jan and Feb. Globally, OS X remained 4th (slightly down from 9.10% to 9.09%) with WinXP staying 3rd, increasing slightly to 12.23%

In Sogeti Studio we are still seeing clients wanting to test desktops on Win7; however they are starting to mention possible additional desktop OS coverage which means they are starting to think beyond Win7. As per other commentary we expect to see client requirements shifting this year, when Windows 10 is released later in 2015.

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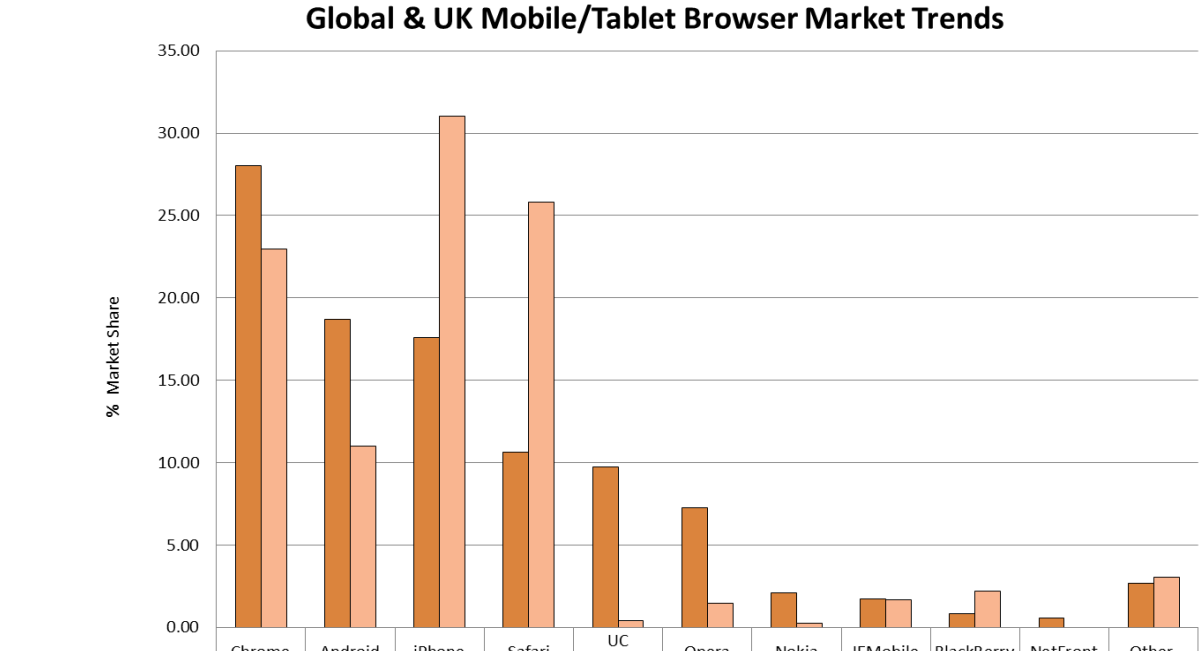
MOBILE/TABLET BROWSER



	Chrome	Android	iPhone	Safari	UC Browser	Opera	Nokia	IEMobile	BlackBerry	NetFront	Other
Global Market Share %	28.04	18.71	17.60	10.66	9.73	7.26	2.12	1.76	0.85	0.58	2.69
UK Market Share %	22.97	11.02	31.04	25.82	0.41	1.48	0.30	1.68	2.20	0.00	3.08

Safari on iPhone continues to dominate the UK market at 31.04% share; however some of the other main mobile/tablet browsers dipped in the UK from Jan-15 to Feb15; Chrome for Android from 24.68% to 22.97% and Android (other android browsers)12.10% to 11.02%, with Safari for Android increasing in the UK from 22.58% to 25.82%.

Globally, Chrome is still in front, up from 26.75% to 28.04%. Android usage is up from 18.64% to 18.71%, with Safari down very slightly from 10.68% to 10.66%. The iPhone native browser is well positioned globally in 3rd at 17.6% share.

Sogeti Studio clients are starting to mention Chrome more as a requirement, especially those clients operating in multiple locations (i.e. UK and US). Chrome and Android remain popular, whilst other browsers on mobile devices have small usage. However for certain small usage mobile browsers there is a niche requirement from certain clients; for example Blackberry (down from 2.54% to 2.20% in the UK) still retains a number of users in the legal sector, which has driven client demand for Studio projects in that sector.

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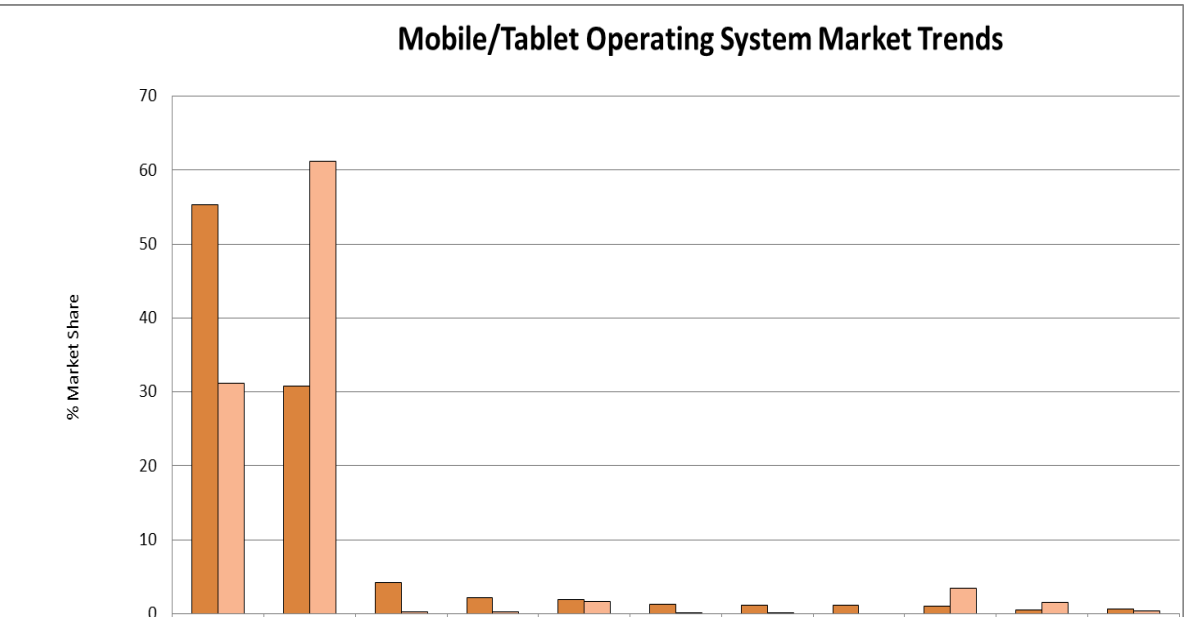
MOBILE/TABLET OPERATING SYSTEM



	Android	iOS	Series 40	Unknown	Windows Phone	SymbianOS	Samsung	Nokia Unknown	BlackBerry OS	Linux	Other
Global Market Share %	55.30	30.78	4.15	2.14	1.87	1.26	1.19	1.15	1.02	0.51	0.63
UK Market Share %	31.14	61.20	0.29	0.26	1.68	0.04	0.01	0.00	3.44	1.55	0.39

Android and iOS continue to dominate the OS market both globally and in the UK; interestingly Android OS is more popular globally (up from 54.47% to 55.30% share) with iOS more popular in the UK (up from 56.58% to 61.20% share). These two OS remain the main players in the market, with a combined market share of over 80% both globally and in the UK. The dominance of these operating systems could be attributed to pre-installation on the devices with the largest market share.

A priority of the Studio is to keep on top of new OS versions as they come out, chiefly for Android and iOS, by knowing when Beta releases are taking place. This helps towards delivering accurate testing for clients on the appropriate OS. The Studio has to maintain a portfolio of devices across OS versions, with upgrades carefully managed.

The Studio is monitoring when the new Windows 10 OS is to be released; this OS will run across Windows phones, desktops and tablets and the impact on the market share will be interesting.

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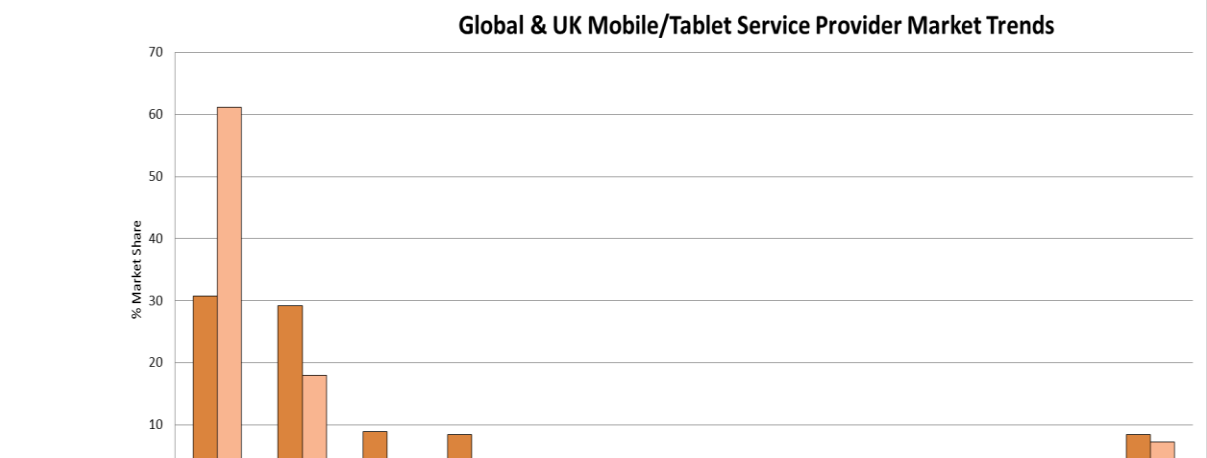
MOBILE/TABLET SERVICE PROVIDER



	Apple	Samsung	Unknown	Nokia	LG	Sony Ericsson	HTC	Motorola	Micromax	Huawei	RIM	Other
Global Market Share %	30.78	29.18	8.87	8.45	3.48	2.64	2.00	1.91	1.84	1.36	1.06	8.43
UK Market Share %	61.20	18.02	1.56	1.84	0.65	2.39	2.30	0.82	0.00	0.32	3.67	7.23

Apple remains the dominant service/device provider, closely followed globally by Samsung with both providers increasing very marginally globally during Feb. In the UK, Apple remains way out in front of Samsung, with Apple up from 56.58% to 61.2% during the month, and Samsung dropping in the UK from 21.28% to 18.02% share.

Nokia remains in 3rd position globally, even though its share dipped in Feb-15 from 9.28% to 8.87%. In the UK, Nokia was fairly static going from 1.85% to 1.84% between Jan and Feb-15. From the early-2015 service provider trends there is nothing as yet to indicate the Studio should deviate the buying policy away from focussing on Apple and Samsung devices. The Studio is monitoring upcoming releases of new Apple and Samsung devices with a view to purchasing them.

The Studio are remaining aware of the other niche service providers (i.e. HTC, LG, Motorola etc.) and certainly device purchases may be made in this direction if market trends and publicity indicate a need.

To find out more about Sogeti Studio, please visit: www.uk.sogeti.com/sogeti-studio

Data Sources:

1. http://gs.statcounter.com/
2. http://marketshare.com/