Why Opera Mini is the world’s most popular and influential mobile browser
On Device Research and Opera Software
Executive summary

In conjunction with mobile research firm On Device Research, Opera Software conducted a large global study to help understand trends in mobile-internet browsing and, more specifically, the effect of the Opera mobile browser and how its user experience compares to other mobile browsers.

The results offered powerful insight into the behaviors and attitudes of mobile-internet users, as well as Opera’s global popularity. The survey results break down trends by region and country to offer conclusions as to why Opera is the world’s most popular and influence browser, with users who are the most active and valuable mobile-internet users for operators and content providers.

Some key findings:

• Mobile is key to connecting people to the internet; Opera is a driver of this. Opera connects the unconnected. Of mobile-only internet users, 56% are Opera users, which is 13% more than non-Opera users.

• Opera users are more satisfied. On a scale of 1 to 10, Opera users report being significantly more satisfied with both their handsets/phones (rating their experience at 7.3 out of 10) and their mobile operators (rating their satisfaction at 7 out of 10). Users’ positive impressions can, in part, be attributed to how well the device and network work with the Opera browser.

• Opera users are strong brand advocates. Opera users want to promote Opera and the mobile internet (11% for Opera users; only 5% for non-Opera users).

• Opera users browse more frequently and browsing-session length is considerably longer. Opera users are 8% more likely than average to spend more than an hour online in one session and 12% more likely than non-Opera users. More than 75% of Opera users report using the mobile internet every day.

• Opera users actively engage with content, downloading and purchasing, which makes them high-value customers. Opera users are active users, with more downloads and higher revenue from purchased content and advertising. On average, 55% of Opera users make purchases on their mobile handsets, significantly more than non-global Opera users at 43%.

The Opera effect shows accelerated growth of mobile-internet activity in markets worldwide on several fronts — explaining not just Opera’s influence and popularity, but also the influence of Opera’s users as leaders in the growing ubiquity of mobile browsing.
The Opera Mini browser

Opera is the world’s most popular mobile browser (figure 1). Opera offers a sophisticated browser product that adapts to the needs of any market. It is a technically flexible solution, easily distributed and a tool that offers benefits to both users and mobile operators. Looking at Opera’s position in the mobile-browser landscape, Opera wanted to understand more about the Opera browser and mobile-internet users in general, comparing and contrasting them on various points, on a granular level. Opera and specialist firm On Device Research undertook global research about mobile-internet use to gain the kind of insight Opera sought.

On Device Research methodology

On Device Research uses the mobile internet to understand the behavior of respondents across the globe. The technology works on both smartphones and feature phones to capture information from all mobile users.

The sample for this study was drawn from On Device Research’s network of publishers and is weighted by demographics and handset manufacturers to ensure a representative sample of mobile-internet users. The study consisted of surveys delivered to users’ mobile handsets. Individual research studies were conducted in 22 different countries across four continents over the course of one year (Nov 2010 - Nov 2011). A survey was completed on respondents’ mobile devices via the mobile internet in order for their browser to be automatically detected, allowing for comparisons between Opera and non-Opera users. More than 34,000 responses were collected.

The results of these individual studies were put together into one global analysis. Because some time has passed between the earlier analyses/studies, and technology moves rapidly, it is important to note that circumstances in many countries have changed to some degree, sometimes even dramatically (for example, since the original research was undertaken in Nigeria, the Opera user base in this country has tripled). The research conclusions are meant to show general trends.

Who uses Opera Mini?

Global Opera users are generally innovators and young early adopters. Global Opera users are more likely to be young men with full-time employment or who are studying. The data collected here reflect the perceptions, attitudes, beliefs and habits reported by mobile-internet users. This is not scientific data based on usage logs as shown, for example, in Opera Software’s State of the Mobile Web report. The data are thus based on reported behavior. The Opera browser offers access to the internet to a key consumer group—young early adopters, the influential generation of the future (figure 2).

Opera users are 18% more likely than users of other browsers to be students/engaging in educational activities (and 6% more likely to be in education or employed), which is confirmed by the majority of markets examined, with some countries showing significant differences between Opera and non-Opera users (there is a 51% difference in Kenya between Opera and non-Opera users, with 68% of Kenyan Opera users pursuing education) (figure 4). This can be broken down further by taking a look at the graph (figure 4), in which the data show, in the first column (on the left), for example, that, in Kenya, 68% of Opera users are in education, while the next column shows that this percentage is 51% more than non-Opera users. (The same data for in-education or employment is shown in the next part of the same graph.)

The majority of users is seen not just as comprising early adopters within their societies, but also as future influencers—being educated and technically savvy mobile-internet users, they are ahead of the curve on technology trends. Other segments of the population are likely to follow their lead.
An interesting aspect of drilling down into usage information is to see data outliers and facts that can be employed by anyone trying to target specific user groups. For example, though the majority of Opera users are young men, in various countries, slightly different use patterns appear. We have, for example, seen that women in South Africa, Thailand, and the United States, and, to a lesser degree, Hungary and Brazil, use Opera much more often than women globally, and this number is growing (figure 5).

Similarly, though the global average user is young, there are a number of countries in which Opera is frequently used by individuals who are aged 35 years or older, notably Hungary, Malaysia and the United States (figure 6). In these markets, it is possible that Opera has a longer history in that market or that women are more technically oriented, or, potentially, mobile operators have launched specific marketing campaigns to target specific user demographics and were successful.
Insights about unusual patterns of use for different genders and age groups in different regions are useful because they open the door to targeting specific user segments. Education and awareness campaigns can be targeted very specifically to certain audiences, which can drive use of the mobile internet, as Opera has seen in several markets in which its mobile-operator partners operate. Targeted marketing campaigns can be built around this kind of information.

**Key findings**

**Opera Mini connects the unconnected**

In many markets, the mobile handset is the only access to the internet for many people. As mobile devices become a more common means of accessing the internet globally, for Opera users and otherwise, it is likely that this trend of mobile-internet access will continue to grow. Globally, 56% of global Opera users access the internet only via their mobile versus 43% of non-Opera users. These percentages of mobile-only access are more dramatic in developing markets, with 72% of Opera users in Egypt, 69% in Bangladesh, 65% in Brazil and 61% in South Africa (figure 7).

Backed by this data, one can state that Opera is an ideal and important tool with which the world’s users can connect to the internet, particularly in places where other means of connection are either rare or unavailable. Opera does in fact connect the world’s unconnected. Other key findings, as will be presented later in this paper, support the idea that Opera goes beyond just connecting these users. The data show that the Opera user experience is satisfying and keeps users engaged, using progressively more data, interacting with, downloading, and buying more content online and becoming more and more active internet users, while actively promoting Opera by word of mouth, thereby creating even more Opera mobile-internet users.
Mobile is key to connecting people to the internet

Looking at a cross section of countries, the primary reason for users accessing the internet on mobile is that the mobile phone is, for many, the only way to access the internet. In developing countries, infrastructure and, in particular, PC/computer access is either non-existent or rare, making the mobile phone the primary, and often only, means for accessing the internet. For example, in India, 40% of all respondents (both Opera and non-Opera users) cited the mobile phone as the only method possible to gain internet access as a reason, with 48% in Indonesia and 48% in Pakistan. Many of the same points that support the assertion that Opera connects the unconnected apply here — because the mobile handset is the tool that makes this access possible (figure 8).

Secondary reasons cited for the popularity of accessing the internet on mobile include those of convenience: always within reach, already switched on and information is immediately accessible. Additionally, for much of the world, it is a cheaper, handier and more easily accessible tool than a computer. (A handset is less expensive, more ubiquitous, offers a lower barrier to entry for internet connectivity and has lower requirements in terms of infrastructure — space, electricity, etc.)

Opera Mini users are satisfied users

Research has shown that mobile-internet users who choose Opera are generally more satisfied with their mobile-internet experiences than those who use their handset’s native browsers. We assert that user satisfaction is what drives continued use and growth. From several factors, this conclusion can be extrapolated.

Opera Mini users report higher satisfaction with their operators and handsets

Across all countries, a strong, direct correlation between device satisfaction and mobile operator satisfaction was identified among Opera users. As the importance of the mobile internet grows, consumer expectations from both device and operator end up culminating in the experience they have from their web browser. The Opera browser has to perform well on the handset and has to accelerate and make the user experience seamless (figure 9). Likewise, to make this possible, the operator experience must also be perceived as positive (figure 10). These factors come together to make users attribute positive feelings toward their devices and operators as a result of a positive browsing/online experience. The positive effect is created by how well the device and the operator work with Opera.

Consumers who use Opera to access the internet seem to make a direct connection between device satisfaction and operator satisfaction. Global Opera users rank device satisfaction at 7.3 on a scale of 1-10 (versus 6.6 in non-Opera users). Global Opera users rank operator satisfaction at 7 on the same scale (versus 6.7) for non-Opera users.
Opera contributes to this effect everywhere, but, looking at country-specific highlights of this data, we can see that Opera contributes to this positive operator effect even more significantly in both Hungary and in Nigeria (figures 11 and 12):

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**Opera Mini users are less likely to switch mobile-internet operators**

Another piece of the puzzle that leads to the assertion that Opera contributes to users’ operator satisfaction is that (besides users themselves reporting higher user satisfaction) Opera users in most markets report that they are less likely to switch to another operator. This sense of loyalty may be a certain level of brand loyalty to the operator and/or happiness with their device(s), among other factors (price, length of subscription, etc.), but the data show that Opera plays a significant role in whether users are satisfied with their operators. This was especially true in 12 of the 21 surveyed markets (Senegal, Indonesia, Thailand, Vietnam, Nigeria, Brazil, Ghana, Belarus, Kenya, India, Pakistan and Bangladesh).

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**Opera Mini users are strong brand advocates**

The data tying user satisfaction to operator satisfaction and a lower likelihood of switching operators seems to relate to how likely Opera users are to promote Opera and the mobile internet in general. Word-of-mouth promotion of Opera is a further, active demonstration of user satisfaction.
The Opera browser is accelerating the growth of mobile internet around the world, with global Opera users more likely to recommend the mobile internet to friends and family than non-Opera users. In calculating the effect of this word-of-mouth promotion, the name “net promoter” has been applied. Basically, this just means that an individual is much more likely to promote something than to detract from it. These survey results supply a measure of customer loyalty and an assessment of word-of-mouth momentum and power. Word of mouth is an important way to influence use one way or another. Negative word-of-mouth “anti-promotion” caused such damage in the UK market that it took two years for mobile-internet uptake to recover; mobile-internet growth depends on the idea that consumers find the experience so compelling that they have to tell others about it and get them to try it for themselves.

The survey results show that global Opera users are significantly stronger net promoters than non-Opera users (figure 13). In general, Opera users actively want to promote mobile-internet use.

In some markets, the difference in percentage between Opera and non-Opera users was quite high, such as in Ukraine, Senegal, Ghana and Philippines, which are all active and growing markets for mobile-internet use and especially for Opera.

In some markets, the net promoter score is barely positive or even negative without Opera (Opera presence makes a stark difference). Ukraine and Ghana are two such examples (figures 14, 15).

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**Figure 13:** Average global net promoter score: Opera v. non-Opera v. total market

**Figure 14:** Net promoter score, Ukraine: highly positive with Opera; very low without Opera

**Figure 15:** Net promoter score, Ghana: highly positive with Opera; negative without Opera
Opera Mini users have more frequent online browsing sessions

Other important measurements of user satisfaction include how often users browse with Opera and how long these online sessions last. Opera users are online more frequently than users of other browsers. Globally, Opera users report using Opera daily.

Opera Mini users browse longer per session

Perhaps more telling is that global Opera users spend more time online per session than non-Opera users. Opera users are eight percentage points more likely than average to spend more than an hour online in one session and 12 percentage points more likely than non-Opera users. As stated above, Opera users browse more frequently and longer per session, leading to an overall result that Opera users use the mobile internet more frequently than non-Opera users. (Globally, 75% of Opera users report using the mobile internet daily.) In the majority of markets, Opera users browse more often (ranging from 2 to 12% more often), in some cases significantly more often, such as in Ukraine (11% more than the average), Philippines (12% more than the average) and Nigeria (11% more than the average).

In several markets, these data on browsing sessions can be quite dramatic (figure 16). In Russia for example Opera users are 63 percentage points more likely than the average to spend more than an hour on the internet and 66 percentage points more likely than non-Opera users. This eagerness to use the internet on mobile is partly attributable to the unlimited data packages that have been widely offered by several of the operators in this market. Unlimited, Opera-specific data plans lead to more browsing and contribute to the significantly higher frequency of browsing and longer browsing sessions. Many operators in other markets have followed suit by introducing unlimited Opera-specific data plans, which has led to similar results.

In Brazil, Opera users are 24 percentage points more likely than non-Opera users to spend more than an hour on the internet and 19 percentage points more likely in Indonesia.

![Figure 16: Online browsing sessions, Opera v. non-Opera users](image)

Opera users actively engage and interact with different kinds of mobile-internet content

The survey results show that users are much more likely to engage in more and varied mobile-internet activities and with different kinds of online content. Because of Opera’s usability and performance, Opera facilitates users’ ability to undertake these activities. Global Opera users are more likely to download games, music and apps and to visit sites for watching and downloading videos. On average, global Opera users download four percentage points more content to their mobile than non-Opera users. Opera users report a variety of different online activities, at significantly higher percentages than non-Opera users (figure 17). Search and social networking are the most popular activities, and Opera users are more active in every activity sphere than non-Opera users.

![Figure 17: Mobile-internet activities performed, Opera v. non-Opera](image)
In most circumstances and most markets, Opera users are the most active performers in these segments. These kinds of percentages also help lead to the conclusion that Opera is a tool that enables users to accomplish what they want to online easily and readily.

Some specifics include, for example, in the Philippines where Opera users are more likely than non-Opera users to visit sites for downloading music (+24%), applications (+15%) and videos (+9%) (figure 18).

![Philippines Mobile Content Browsing](image)

In the data on Philippines, Brazil and Indonesia, for example, we see that social networking is the most popular activity. Games are downloaded more often in Bangladesh than any other market. In many cases, mobile-internet users engaging in specific activities report a whole percentage of use that is the same or lower than that reported by Opera users. For example, in Kenya, which is the top market for downloading music, the whole market is 73%, while Opera users report 77%. Opera contributes to the growth of this activity in the Kenyan market. Similarly, in Senegal, the top market for downloading and watching videos, the whole market percentage is 59% while Opera users report 74%. Results in almost every category indicate that Opera use drives online activity levels higher.

Some other interesting regional specifics include high download numbers in India (particularly the mobile download of music) (figure 19) and in Brazil (where music likewise leads its downloads in volume) (figure 20).

![India Mobile Content Browsing](image)

![Brazil Mobile Content Browsing](image)
Opera Mini users purchase more online content

One highly relevant, important point about Opera being influential in driving online activity is that this also shows that Opera users are more likely to purchase content online. This is relevant, because operators and mobile advertisers both gain access to a larger, clearer audience. Operators and content providers know that happy, active Opera users are already engaged in downloading and purchasing content and are thus more likely to purchase more. Advertisers also know that they can gain access to more targeted audiences/users with Opera. Opera users clearly offer opportunities for revenue.

The survey shows that the most popular purchases are for music and games; on average, 55% of Opera users make some small purchase on their mobile phones, significantly more than non-global Opera users at 43%, making Opera users high-value customers.

The chart below shows that Opera browsers are 35% more likely to purchase music via their mobile devices than those who don’t use Opera and 29% more likely to purchase games (figure 21).

![Figure 21: Mobile content purchases, Opera v. non-Opera users](image)

Africa leads the way in terms of purchasing behavior with African Opera users purchasing more content than non-Opera users (55% versus 41%). Kenya is the star market — 88% of Opera users have purchased in this market (figure 22).

![Figure 22: African download and purchase habits](image)
Opera users in Asia are also significantly more likely to have purchased downloaded content than non-Opera users (51% vs 45%), with Indonesia and Bangladesh the star markets (figure 23).

<table>
<thead>
<tr>
<th>ASIA – Opera Summary</th>
<th>Average PURCHASE across region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opera</td>
<td>51%</td>
</tr>
<tr>
<td>Non Opera</td>
<td>45%</td>
</tr>
</tbody>
</table>

Figure 23: Asian download and purchase habits

Similarly, in Europe, Opera users significantly purchased more content than non-Opera users. Key players in the European market include Hungary, Ukraine, Russia and Belarus (figure 24). This trend is also evident in South America (49% for Opera users vs 42% for non-Opera users) with Brazil the star of this market. Brazil’s Opera users are significantly stronger on download action, social networking and email use than non-Opera users.

<table>
<thead>
<tr>
<th>EUROPE – Opera Summary</th>
<th>Average ACTION across region</th>
<th>Average PURCHASE across region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opera</td>
<td>39%</td>
<td>50%</td>
</tr>
<tr>
<td>Non Opera</td>
<td>35%</td>
<td>42%</td>
</tr>
</tbody>
</table>

Figure 24: European download and purchase habits
Conclusion

Survey results show that Opera offers access to the influential and educated youth across the globe in several different ways. The results also offer supporting evidence to explain the global popularity of Opera and reasons why Opera customers are the most valuable mobile-internet users.

Mobile is key to connecting people to the internet; Opera is a driver of this. Opera connects the unconnected. We have seen from the survey results that Opera connects the previously unconnected and shows that where users have access only to mobile, this is not a hindrance to accessing the internet. In India, Indonesia and Pakistan, the mobile phone is the primary, and often only, way users access the internet, at 40%, 48% and 48%, respectively. Of those using the internet on mobile only, 56% are Opera users, which is 13% more than non-Opera users.

Opera users are more satisfied. Opera users report being more satisfied than non-Opera users with both their mobile operators and devices. On a scale of 1 to 10, users reported that operator satisfaction ranked at 7; device satisfaction ranked at 7.3. Users’ positive impressions can, in part, be attributed to their overall positive browsing/online experience, i.e., how well the operator/network and the device work with the Opera browser.

Opera users are strong brand advocates. Compared to non-Opera users, Opera users’ behavior and actions indicate that they are significantly more likely to promote Opera to friends and family by word of mouth. (Opera users stand at 11% while non-Opera users stand at only 5%.)

Opera users actively engage with content. This leads to more active users, more downloads and higher revenue from purchased content and advertising. On average, 55% of Opera users make purchases on their mobile, significantly more than non-global Opera users at 43%, making Opera users high value customers.

Where users adopted Opera, use was more frequent, in longer sessions and much more likely to result in downloads and content purchases. The positive user experience not only makes Opera users highly valuable customers but expands the customer base overall—Opera users spread the word about their positive user experiences and convert non-users. This accelerates the growth of the mobile internet in markets worldwide, truly lending credence to the point that Opera users are influential and leading the way in the mobile-internet market.

To learn more about Opera Software, visit http://www.opera.com/.

To learn more about On Device Research, visit http://ondeviceresearch.com/.