

State of the Mobile Web, March 2009

April 27, 2009

Dear friends,

In July 2008, we produced our first ever geographic spotlight. We covered Latin America, a region in which mobile Web penetration was quickly rising. This month, we return to see how Latin America has changed--and changed it has.

Brazil, once the country with the most Opera Mini users, has been surpassed by Chile, which jumped from number 9 to number 1 in less than one year. To some, this growth might be surprising, but Chile is one of the leading countries for mobile communication in Latin America.

In keeping with the spirit of change in our geographic spotlight, our top 10 list this month welcomes yet another first-timer. Nigeria joins the top 10 list at number 10, just edging out Germany.

However, the most enjoyable change for me is that Opera Mini continued its upward ascent after February's shortened month. In March, more than 23 million people browsed the Web with Opera Mini. If there is any debate about the need to make Web content mobile-friendly, this number should put the argument to rest: 8.6 billion. That is the number of Web pages our servers processed in March alone.

Of course, "mobile-friendly" does not equal WAP. We believe in One Web. This philosophy of offering the same content, services and applications, regardless of device, makes it much easier on both developers, who no longer need to create separate content or maintain separate infrastructure, and users, who can use the same services and applications wherever they are.

We provide many excellent resources for mobile developers at dev.opera.com. I certainly recommend it to the many of you who are helping shape the next generation of the Web.

What surprised me was that there was significant traffic 24 hours a day. I was expecting the difference between the peak and the bottom to be more than 3X. That is for me the most significant finding.

Kind Regards,

Jon S. von Tetzchner, CEO, Opera Software



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Highlights

- Opera Mini displayed impressive growth in March, boasting double-digit percentage increases for unique users, page views and data consumed.
- China had a strong showing this month in terms of Opera Mini user growth, pushing it above Ukraine in the top 10 list of countries.
- A surge of Opera Mini users in Nigeria pushed that country into the top ten, displacing Germany.
- This report, along with subsequent reports, contains additional data (year-on-year user growth, year-on-year page view growth and page views per user) for the global top ten countries and the countries featured in our regional spotlight.
- The top 10 countries using Opera Mini in Latin America are Chile, Brazil, Mexico, Venezuela, Argentina, Costa Rica, Colombia, Paraguay, Dominican Republic and Suriname.
- Some numbers regarding Latin America: From March 2008 to March 2009, overall page views in the top 10 countries listed increased 673%. From March 2008 to March 2009, overall unique users in the top 10 countries listed increased 164%. From March 2008 to March 2009, overall data transferred in the top 10 countries listed increased 510%.
- Since our last spotlight on Latin America, Chile jumped from #9 to #1, and Colombia jumped from #11 to #7. Dominican Republic and Suriname are new to the spotlight.
- Google, Live and Facebook all do well in Latin America. Orkut is still strong in Brazil and Paraguay. Smaller social-networking sites, such as hi5, are also strong in several Latin American countries.
- Nokia dominates in Latin America, followed by Sony Ericsson; though, a Huawei phone is the top handset in Colombia. In Costa Rica, the entire top 10 list of handsets is populated by Sony Ericsson phones.
- In Part 4 of this month's report, we looked at one 24-hour period (Tuesday, March 17th) to see how Opera Mini is used throughout the day in the top 10 countries. In this case, we measured usage according to data transferred.

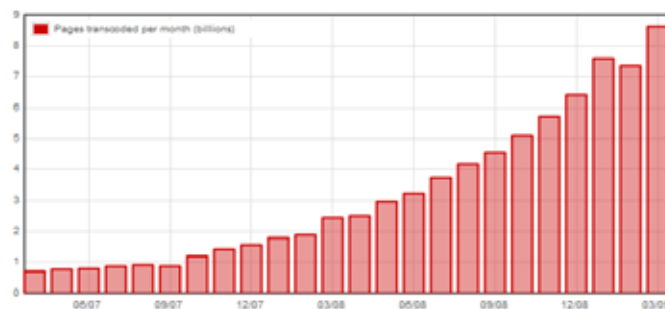
Part 1: Growth

Number of Users

In March 2009, Opera Mini had over 23 million users, a 12.1% increase from February 2009 and more than 157% compared to March 2008.

Pages Transcoded

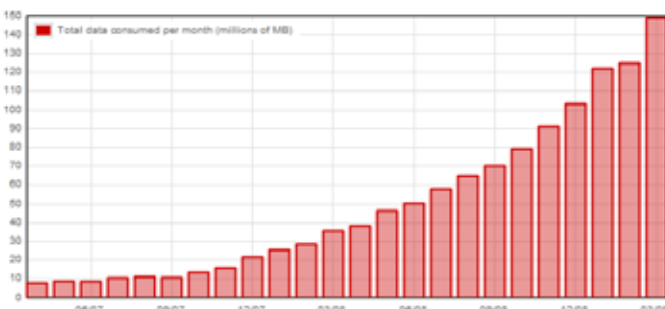
Opera Mini users viewed over 8.6 billion pages in March 2009. Since February, page views have gone up 17.4%. Since March 2008, page views have increased 255%.



Pages transcoded by Opera Mini per month (billions)

Data Consumed

In March 2009, Opera Mini users generated more than 148 million MB of data for operators worldwide. Since February, the data consumed went up by 19.3%. Data in Opera Mini is compressed up to 90%. If this data were uncompressed, Opera Mini users would have viewed up to 1.4 PB of data in March. Since March 2008, data traffic is up 319%.



Total data consumed per month (millions of MB)

Part 2: Country snapshots for March 2009

Snapshot: Russia

Page-view growth since March 2008: 216%, Unique-user growth since March 2008: 102%, Page-views per user: 428

For the first time, odnoklassniki.ru overtook mail.ru, with the latter site dropping to position 4—its lowest ranking since the inception of this report.

Top 10 sites in Russia (# of unique users)

- 1) vkontakte.ru
- 2) odnoklassniki.ru (up from 4)
- 3) yandex.ru
- 4) mail.ru (down from 2)
- 5) rambler.ru
- 6) google.com
- 7) wikipedia.org (up from 9)
- 8) wapos.ru
- 9) my.opera.com (down from 7)
- 10) seclub.org

Top handsets for March 2009

- 1) Nokia 6300
- 2) Nokia N73
- 3) Sony Ericsson K790i
- 4) Sony Ericsson K750i
- 5) Nokia 6233
- 6) Sony Ericsson K550i
- 7) Nokia N70
- 8) Sony Ericsson W760i
- 9) Nokia 5310
- 10) Nokia 6120c

Snapshot: Indonesia

Page-view growth since March 2008: 442%, Unique-user growth since March 2008: 180%, Page-views per user: 357

Over the last few months, GameJump has been falling in Indonesia's top 10 list.

Top 10 sites in Indonesia (# of unique users)

- 1) friendster.com
- 2) google.com
- 3) facebook.com
- 4) yahoo.com
- 5) waptrick.com
- 6) peperonity.com
- 7) getjar.com (up from 8)
- 8) digg.com (up from 10)
- 9) wikipedia.org
- 10) gamejump.com (down from 7)

Top handsets for March 2009

- 1) Nokia N70
- 2) Nokia 6300
- 3) Nokia 6600
- 4) Nokia 5310
- 5) Nokia N73
- 6) Sony Ericsson W200i
- 7) Nokia 3230
- 8) Nokia 3500c
- 9) Nokia 5610
- 10) Sony Ericsson K750i

Snapshot: China

Page-view growth since March 2008: 372%, Unique-user growth since March 2008: 79%, Page-views per user: 253
For yet another month, only the bottom of China's top 10 list has changed.

Top sites in China (unique users)

- 1) kong.net
- 2) baidu.com
- 3) google.cn
- 4) sina.com.cn
- 5) xiaonei.com
- 6) qq.com
- 7) hao123.com
- 8) operachina.com
- 9) taobao.com
- 10) sohu.com (back on the list)

Top handsets for March 2009

- 1) Nokia 5000
- 2) Nokia 7100s
- 3) Nokia 5220
- 4) Nokia 7310c
- 5) Nokia 6300
- 6) Nokia 5300
- 7) Nokia 6120c
- 8) Nokia N73
- 9) Nokia 7610s
- 10) Nokia 3110c

Snapshot: Ukraine

Page-view growth since March 2008: 343%, Unique-user growth since March 2008: 86%, Page-views per user: 599
This month, Yandex reached its highest ranking so far in Ukraine. Google and Yahoo are conspicuously absent from this month's top 10 list.

Top 10 sites in Ukraine (# of unique users)

- 1) vkontakte.ru
- 2) yandex.ru (up from 3)
- 3) mail.ru (down from 2)
- 4) wapos.ru (up from 5)
- 5) rambler.ru (down from 4)
- 6) my.opera.com
- 7) wikipedia.org
- 8) spaces.ru (back on the list)
- 9) waplog.net (new)
- 10) seclub.org

Top handsets for March 2009

- 1) Nokia 6300
- 2) Nokia 6233
- 3) Nokia N73
- 4) Sony Ericsson K750i
- 5) Nokia 5310
- 6) Sony Ericsson K800i
- 7) Sony Ericsson K550i
- 8) Nokia N70
- 9) Nokia 3250
- 10) Nokia 5300

Snapshot: India

Page-view growth since March 2008: 153%, Unique-user growth since March 2008: 53%, Page-views per user: 359
This month, GameJump fell off of India's top 10 list. GetJar, on the other hand, is new to the list.

Top 10 sites in India (# of unique users)

- 1) google.com
- 2) orkut.com
- 3) yahoo.com
- 4) gmail.com
- 5) rediff.com (up from 6)
- 6) wikipedia.org (up from 8)
- 7) songs.pk
- 8) peperonity.com (up from 9)
- 9) my.opera.com (up from 10)
- 10) getjar.com (new)

Top handsets for March 2009

- 1) Nokia N70
- 2) Nokia N73
- 3) Nokia 3110c
- 4) Nokia 6300
- 5) Nokia N72
- 6) Nokia 3500c
- 7) Nokia 6233
- 8) Sony Ericsson W200i
- 9) Sony Ericsson K750i
- 10) Nokia 5310

Snapshot: South Africa

Page-view growth since March 2008: 182%, Unique-user growth since March 2008: 78%, Page-views per user: 242
South Africa is the only top 10 country this month where Facebook is ahead of Google in the top 10 list of sites.

Top 10 sites in South Africa (# of unique users)

- 1) facebook.com
- 2) google.com
- 3) wikipedia.org
- 4) zamob.com (up from 6)
- 5) my.opera.com (up from 7)
- 6) yahoo.com (down from 5)
- 7) gamejump.com (down from 4)
- 8) gmail.com
- 9) waptrick.com
- 10) mxit.com (back on the list)

Top handsets for March 2009

- 1) Samsung E250
- 2) Nokia N70
- 3) Sony Ericsson W910i
- 4) Nokia 6300
- 5) Samsung D900i
- 6) Nokia 6500s
- 7) Nokia 5000d
- 8) Nokia N73
- 9) Sony Ericsson S890i
- 10) Samsung D900

Snapshot: United States

Page-view growth since March 2008: 118%, Unique-user growth since March 2008: 16%, Page-views per user: 195
ESPN is back on the list after a four-month absence.

Top 10 sites in the United States (# of unique users)

- 1) google.com
- 2) facebook.com
- 3) myspace.com
- 4) wikipedia.org
- 5) nytimes.com
- 6) yahoo.com (up from 7)
- 7) youtube.com (down from 6)
- 8) accuweather.com (up from 9)
- 9) my.opera.com (up from 10)
- 10) espn.com (back on the list)

Top handsets for March 2009

- 1) BlackBerry 8330
- 2) LG CU920
- 3) BlackBerry 8130
- 4) Samsung SPH-M800
- 5) Samsung SPH-M810
- 6) BlackBerry 9000
- 7) BlackBerry 9530
- 8) BlackBerry 8310
- 9) BlackBerry 8320
- 10) Nokia N73

Snapshot: United Kingdom

Page-view growth since March 2008: 119%, Unique-user growth since March 2008: 48%, Page-views per user: 229
This month, the UK top 10 list showed very little change.

Top 10 sites in the United Kingdom (# of unique users)

- 1) google.com
- 2) facebook.com
- 3) yahoo.com
- 4) bbc.co.uk
- 5) live.com
- 6) wikipedia.org
- 7) bebo.com
- 8) youtube.com
- 9) msn.com (up from 10)
- 10) my.opera.com (back on the list)

Top handsets for March 2009

- 1) LG KC910
- 2) Nokia 6300
- 3) LG KE970
- 4) Samsung SGH-G600
- 5) LG 8138
- 6) Sony Ericsson W910i
- 7) LG KF750
- 8) Nokia 6500s
- 9) Samsung U600
- 10) Sony Ericsson K800i

Snapshot: Poland

Page-view growth since March 2008: 202%, Unique-user growth since March 2008: 98%, Page-views per user: 176
INTERIA.PL, a Polish portal, is new to the top 10 list.

Top 10 sites in Poland (# of unique users)

- 1) nasza-klasa.pl
- 2) google.com
- 3) lajt.onet.pl
- 4) allegro.pl
- 5) wikipedia.org
- 6) wp.pl (up from 7)
- 7) fotka.pl (down from 6)
- 8) youtube.com
- 9) sciaga.pl (up from 10)
- 10) interia.pl (new)

Top handsets for March 2009

- 1) Sony Ericsson K800i
- 2) Nokia 6300
- 3) Sony Ericsson K550i
- 4) Nokia 6500s
- 5) Nokia 5310
- 6) Sony Ericsson K750i
- 7) Samsung D900i
- 8) Nokia E51
- 9) Sony Ericsson W200i
- 10) Nokia 3110c

Snapshot: Nigeria

Page-view growth since March 2008: 4,322%, Unique-user growth since March 2008: 1,472%, Page-views per user: 324
Facebook is the preferred social-networking site in Nigeria.
Nairaland, a Nigerian forum site, is popular among Opera Mini users.

Top 10 sites in Egypt (# of unique users)

- 1) google.com
- 2) yahoo.com
- 3) facebook.com
- 4) wikipedia.org
- 5) bbc.co.uk
- 6) goal.com
- 7) my.opera.com
- 8) waptrick.com
- 9) nairaland.com
- 10) mygamma.com

Top handsets for March 2009

- 1) Nokia N70
- 2) Nokia 3110c
- 3) Nokia N72
- 4) Sony Ericsson K750i
- 5) Nokia 3230
- 6) Nokia 6600
- 7) Nokia 6630
- 8) Sony Ericsson K800i
- 9) Nokia N73
- 10) Nokia 2626

Part 3: Spotlight on Latin America

- The top 10 countries using Opera Mini in Latin America are Chile, Brazil, Mexico, Venezuela, Argentina, Costa Rica, Colombia, Paraguay, Dominican Republic and Suriname.
- Some numbers regarding Latin America: From March 2008 to March 2009, overall page views in the top 10 countries listed increased 673%. From March 2008 to March 2009, overall unique users in the top 10 countries listed increased 164%. From March 2008 to March 2009, overall data transferred in the top 10 countries listed increased 510%.
- Since our last spotlight on Latin America, Chile jumped from #9 to #1, and Colombia jumped from #11 to #7. Dominican Republic and Suriname are new to the spotlight.
- Google, Live and Facebook all do well in Latin America. Orkut is still strong in Brazil and Paraguay. Smaller social-networking sites, such as hi5, are also strong in several Latin American countries.
- Nokia dominates in Latin America, followed by Sony Ericsson; though, a Huawei phone is the top handset in Colombia. In Costa Rica, the entire top 10 list of handsets is populated by Sony Ericsson phones.

Top 10 countries snapshot

Snapshot: Chile

Page-view growth since March 2008: 25,923%, Unique-user growth since March 2008: 3,215%, Page-views per user: 537

As in South Africa, Chile is a country where Facebook is ahead of Google. Chile is also the only Latin American country in the top 10 where Google is not number one.

Fotolog, popular among Chilean youth, ranks highly as well.

Top 10 sites in Chile (# of unique users):

- 1) facebook.com
- 2) google.com
- 3) live.com
- 4) msn.com
- 5) fotolog.com
- 6) hotmail.com
- 7) youtube.com
- 8) wikipedia.org
- 9) ebuddy.com
- 10) my.opera.com

Top handsets for March 2009:

- 1) Nokia 5200
- 2) Sony Ericsson W200a
- 3) Sony Ericsson K310a
- 4) Sony Ericsson W580i
- 5) Sony Ericsson W300i
- 6) Sony Ericsson W380
- 7) Nokia 5310
- 8) Nokia 5220
- 9) Sony Ericsson K510a
- 10) Nokia 5300

Snapshot: Brazil

Page-view growth since March 2008: 164%, Unique-user growth since March 2008: 38%, Page-views per user: 167

Orkut is the preferred social-networking site among Opera Mini users in Brazil.

In Latin America, Gmail is on the top 10 lists for Brazil and Costa Rica.

Top 10 sites in Brazil (# of unique users):

- 1) google.com
- 2) orkut.com
- 3) globo.com
- 4) live.com
- 5) terra.com.br
- 6) youtube.com
- 7) gmail.com
- 8) wikipedia.org
- 9) my.opera.com
- 10) mercadolivre.com.br

Top handsets for March 2009:

- 1) Nokia 5000d
- 2) Nokia 5310
- 3) Nokia N95
- 4) Nokia 5610
- 5) Nokia 3120b
- 6) Nokia E71
- 7) Nokia 2680s
- 8) Nokia 3600
- 9) Nokia 5220
- 10) Nokia N73

Snapshot: Mexico

Page-view growth since March 2008: -11%, Unique-user growth since March 2008: 20%, Page-views per user: 107
Opera Mini users in Mexico prefer metroFLOG for social networking.

Top 10 sites in Mexico (# of unique users):

- 1) google.com
- 2) live.com
- 3) youtube.com
- 4) metroflog.com
- 5) yahoo.com
- 6) wikipedia.org
- 7) hi5.com
- 8) hotmail.com
- 9) msn.com
- 10) my.opera.com

Top handsets for March 2009:

- 1) Nokia 5610
- 2) Nokia 5310
- 3) Nokia 6300
- 4) Nokia 3500c
- 5) Nokia 5220
- 6) Sony Ericsson W580i
- 7) Nokia 5300
- 8) Nokia N95
- 9) Sony Ericsson W300i
- 10) Sony Ericsson W200a

Snapshot: Venezuela

Page-view growth since March 2008: 281%, Unique-user growth since March 2008: 153%, Page-views per user: 157
Venezuelan users of Opera Mini prefer Facebook for social networking.

Top 10 sites in Venezuela (# of unique users):

- 1) google.com
- 2) facebook.com
- 3) live.com
- 4) wikipedia.org
- 5) youtube.com
- 6) hotmail.com
- 7) msn.com
- 8) mercadolibre.com.ve
- 9) my.opera.com
- 10) scribd.com

Top handsets for March 2009:

- 1) Nokia 5000d
- 2) Nokia 5220
- 3) Nokia 5310
- 4) Nokia 3500c
- 5) Nokia 5610
- 6) Nokia 7610
- 7) Nokia 6300
- 8) Sony Ericsson W200i
- 9) Nokia 7310
- 10) Sony Ericsson W580i

Snapshot: Argentina

Page-view growth since March 2008: 611%, Unique-user growth since March 2008: 111%, Page-views per user: 176
Facebook is the top social-networking site in Argentina.

Top 10 sites in Argentina (# of unique users):

- 1) google.com
- 2) live.com
- 3) facebook.com
- 4) youtube.com
- 5) yahoo.com
- 6) hotmail.com
- 7) wikipedia.org
- 8) taringa.net
- 9) msn.com
- 10) my.opera.com

Top handsets for March 2009:

- 1) Nokia 5610
- 2) Nokia 5310
- 3) Nokia 6131
- 4) Nokia 3600
- 5) Nokia N95
- 6) Sony Ericsson W200a
- 7) Nokia 5200
- 8) Sony Ericsson W380
- 9) Nokia 5000d
- 10) Sony Ericsson W300i

Snapshot: Costa Rica

Page-view growth since March 2008: 180%, Unique-user growth since March 2008: 79%, Page-views per user: 257
Opera Mini users in Costa Rica use hi5 for social networking, followed by Facebook.

In Latin America, Gmail is on the top 10 lists for Costa Rica and Brazil.

Top 10 sites in Costa Rica (# of unique users):

- 1) google.com
- 2) hi5.com
- 3) live.com
- 4) hotmail.com
- 5) msn.com
- 6) facebook.com
- 7) wikipedia.org
- 8) gmail.com
- 9) youtube.com
- 10) gamejump.com

Top handsets for March 2009:

- 1) Sony Ericsson W810i
- 2) Sony Ericsson W610i
- 3) Sony Ericsson K550i
- 4) Sony Ericsson W200a
- 5) Sony Ericsson W580i
- 6) Sony Ericsson K850i
- 7) Sony Ericsson W880i
- 8) Sony Ericsson K800i
- 9) Sony Ericsson W300i
- 10) Sony Ericsson W910i

Snapshot: Colombia

Page-view growth since March 2008: 308%, Unique-user growth since March 2008: 231%, Page-views per user: 118
Opera Mini users in Colombia prefer Facebook for social networking, followed by hi5.

Top 10 sites in Colombia (# of unique users):

- 1) google.com
- 2) live.com
- 3) facebook.com
- 4) hotmail.com
- 5) msn.com
- 6) youtube.com
- 7) eltiempo.com
- 8) wikipedia.org
- 9) my.opera.com
- 10) hi5.com

Top handsets for March 2009:

- 1) Huawei U535
- 2) Nokia 5610
- 3) Nokia 3500c
- 4) Nokia 5310
- 5) Huawei U1215
- 6) Nokia N95
- 7) Sony Ericsson W200a
- 8) Nokia 6300
- 9) Nokia 3120b
- 10) Nokia 5000d

Snapshot: Paraguay

Page-view growth since March 2008: 82%, Unique-user growth since March 2008: -8%, Page-views per user: 245
As in Brazil, Opera Mini users in Paraguay use Orkut for social networking.

Top 10 sites in Paraguay (# of unique users):

- 1) google.com
- 2) orkut.com
- 3) live.com
- 4) hotmail.com
- 5) wikipedia.org
- 6) abc.com.py
- 7) msn.com
- 8) youtube.com
- 9) my.opera.com
- 10) facebook.com

Top handsets for March 2009:

- 1) Nokia 6230
- 2) Nokia 6300
- 3) Nokia 6120
- 4) Nokia 6620
- 5) Nokia 5610
- 6) Nokia 6131
- 7) Sony Ericsson W810i
- 8) Nokia N73
- 9) Nokia 5310
- 10) Nokia 3120b

Snapshot: Dominican Republic

Page-view growth since March 2008: 1,137%, Unique-user growth since March 2008: 341%, Page-views per user: 160
Facebook is popular in the Dominican Republic, followed very closely by hi5.

Top 10 sites in Dominican Republic (# of unique users):

- 1) google.com
- 2) live.com
- 3) facebook.com
- 4) hi5.com
- 5) youtube.com
- 6) msn.com
- 7) hotmail.com
- 8) my.opera.com
- 9) myspace.com
- 10) wikipedia.org

Top handsets for March 2009:

- 1) Sony Ericsson W200a
- 2) Sony Ericsson W300i
- 3) Sony Ericsson K750i
- 4) BlackBerry 8330
- 5) Sony Ericsson W580i
- 6) Sony Ericsson W810i
- 7) Sony Ericsson W200i
- 8) Nokia N70
- 9) Nokia N73
- 10) Nokia 6300

Snapshot: Suriname

Page-view growth since March 2008: 101,629%, Unique-user growth since March 2008: 18,685%, Page-views per user: 406
Opera Mini users in Suriname prefer hi5 for social networking.

Top 10 sites in Suriname (# of unique users):

- 1) google.com
- 2) live.com
- 3) hi5.com
- 4) msn.com
- 5) hotmail.com
- 6) schandalig.com
- 7) waptrick.com
- 8) hyves.nl
- 9) gamejump.com
- 10) mamjo.com

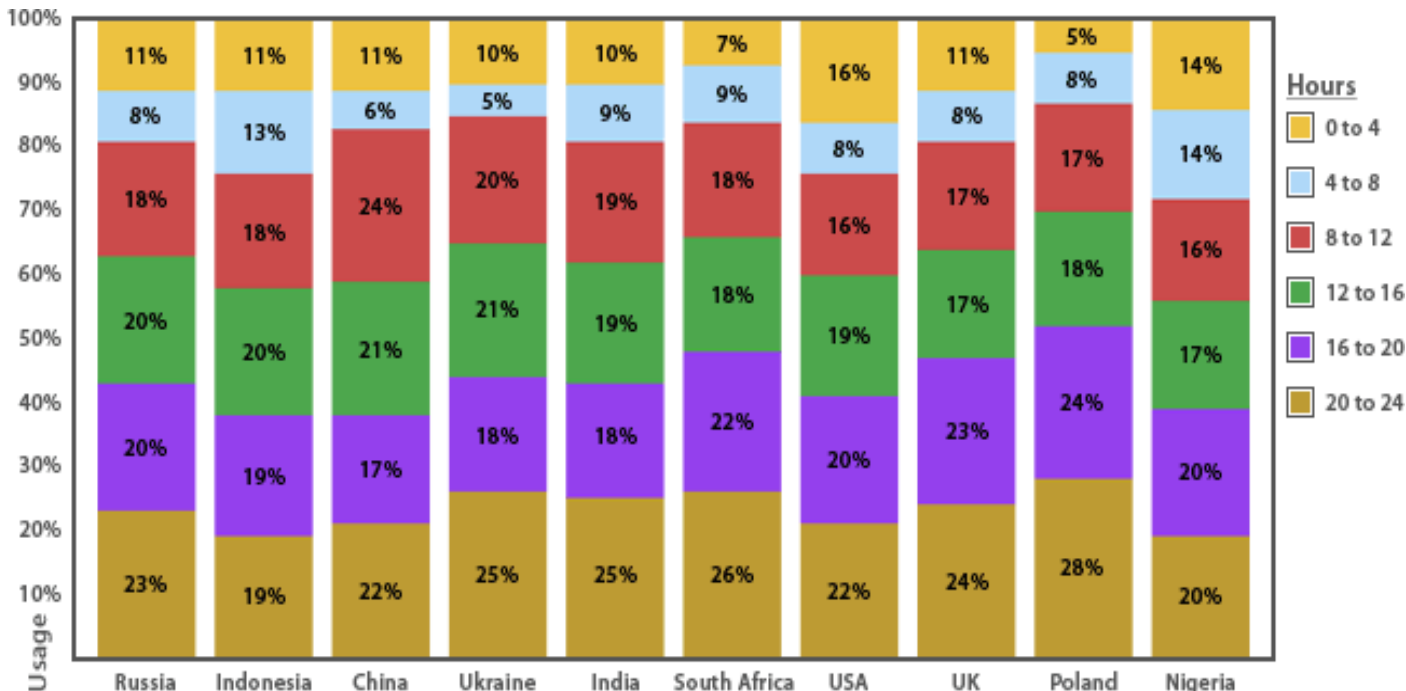
Top handsets for March 2009:

- 1) Sony Ericsson W810i
- 2) Sony Ericsson W200i
- 3) Nokia 6230i
- 4) Sony Ericsson K750i
- 5) Sony Ericsson W880i
- 6) Samsung E250
- 7) Nokia 6300
- 8) Sony Ericsson K800i
- 9) Sony Ericsson W610i
- 10) Sony Ericsson K550i

Part 4: Opera Mini use over the course of a day

We looked at one 24-hour period (Tuesday, March 17th) to see how Opera Mini is used throughout the day in the top 10 countries. In this case, we measured usage according to data transferred.

For analysis, the 24-hour day was split into six 4-hour slices (using local times).



Here is what we observed:

- In all but two of the top 10 countries, the highest level of Opera Mini use is at the tail end of the day -- from 8pm to midnight. In Indonesia, Opera Mini is used most between noon and 4pm. In China, Opera Mini is used most between 8am and noon.
- More than users from any other top 10 country, Nigerians are likely to be browsing with Opera Mini between 4am and 8am.
- More than users from any other top 10 country, Chinese users are likely to be browsing with Opera Mini between 8am and noon.
- More than users from any other top 10 country, Ukrainian and Chinese users are likely to be browsing with Opera Mini between noon and 4pm.
- More than users from any other top 10 country, Polish users are likely to be browsing with Opera Mini between 4pm and midnight.
- Users in all of the top 10 countries are least likely to use Opera Mini between the hours of midnight and 8am.
- In all of the top 10 countries, except Indonesia and China, usage of Opera Mini between 4pm and midnight outweighs Opera Mini usage between 8am and 4pm.
- The difference in Opera Mini usage during peak hours versus off-peak hours varies in each country. The biggest difference is noticeable in Poland (28% between 8pm and midnight versus 5% between midnight and 4am). The smallest difference is noticeable in Nigeria (20% between 8pm and midnight versus 14% between midnight and 4am).