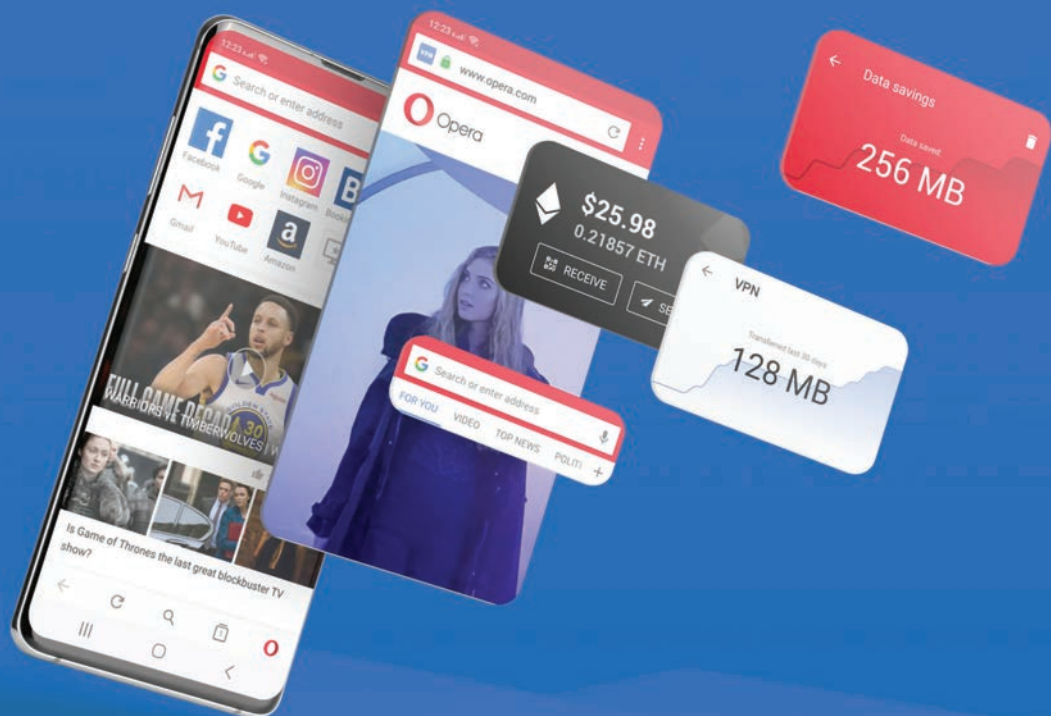


Africa in focus

# State of the mobile web 2019





# Leading the digital transformation in Africa

## Content

<b>Page 5</b> Foreword	<b>Page 18</b> Mobile data savings
<b>Page 6</b> Key numbers	<b>Page 20</b> Data savings impacts value of data
<b>Page 8</b> Africa – Rapid Digitalization	<b>Page 22</b> Opera News – The number one news app
<b>Page 9</b> Fast growing – Opera apps in Africa	<b>Page 24</b> From zero to 20 million users
<b>Page 10</b> Transition towards smartphones	<b>Page 25</b> The leading news apps
<b>Page 12</b> Trends in apps and media usage	<b>Page 28</b> Media consumption patterns in Opera News
<b>Page 13</b> Everyday media habits	<b>Page 29</b> Fast growing video consumption
<b>Page 14</b> Social media and browsing	<b>Page 30</b> Afterword
<b>Page 16</b> More than 30 minutes of daily browsing with Opera Mini	<b>Page 31</b> References



# Foreword

**For more than 20 years, Opera has been providing people around the world with fast and smart browsers. Today, Opera has moved beyond being a browser developer. Our mobile apps and AI news services accompany more than 350 million people from all around the world on their daily lives.**

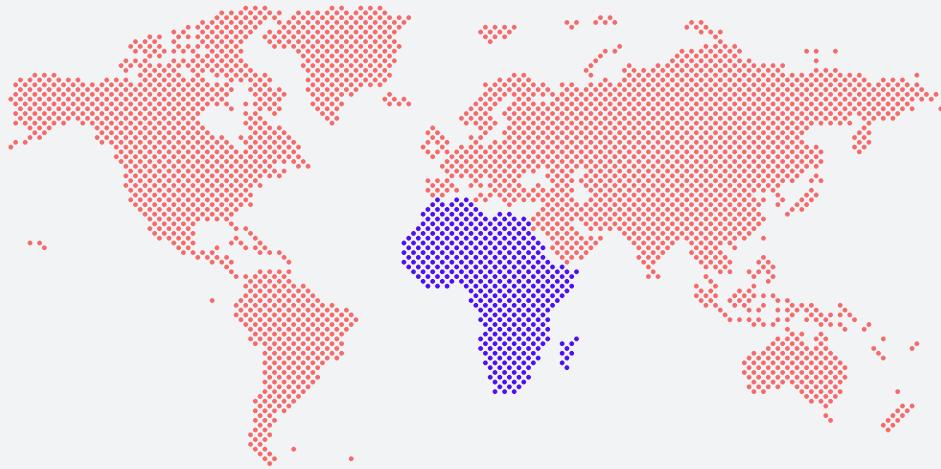
In our State of Mobile Web 2019 report, we take a detailed look at the African region. Opera was the first browsers that brought the full Internet experience to mobile phones. Today, Opera is leading the exciting digital revolution in Africa, with a fast growing user base, and we are now also expanding also beyond doing web browsers. In the first quarter of 2019 there were well nearly 120 million people across Africa who choose Opera's applications in their everyday lives. Currently, one in five Africans use the Opera mobile browsers, spending more than 30 minutes browsing every day.

In countries such as Nigeria and Kenya, Opera is the browser of choice for every second mobile internet user. We are thankful that people choose Opera, instead of the browsers that come preinstalled on their devices. We believe this is because our products are unique and tailored to carefully address people's needs.

In this report we take a closer look at the usage and reasons why more than 100 million Africans choose Opera. Moreover, we look at the growth of our browsers and standalone news application, the trends for video consumption in Africa, access to social media, and we explain how data savings in our products saved Opera users in Africa almost \$100 million USD in 2018.

**Jørgen Arnesen**  
Global Head of Marketing  
and Distribution at Opera

## Spotlight – Africa and global

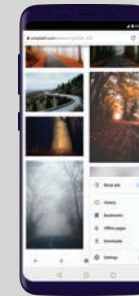


**350 million** MAU of Opera products worldwide Q1 2019.

**119 million** Monthly active users of Opera products in Africa.

**150 million** Users of Opera News service globally.

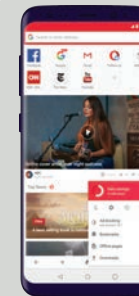
**26%** Total user base of apps in Africa grew by more than YoY Growth 25% in YoY comparison.



The new standard: The Opera Browser, with more speed and privacy. Free for Mobile, Mac, PC and with a built-in VPN, ad blocker, and crypto wallet.

**40% growth**

High end browser Opera for Android, grew its user base by 40% in Africa as of Q1-2019.



Opera Mini is one of the world's most popular and efficient mobile browsers available, featuring a built-in ad blocker, data savings, and news feed.

**30+ minutes**

Opera Mini users in Africa spend 30+ minutes on daily browsing by the end of Q1-2019.



The fastest growing news app in Africa. Get fast news and watch trending videos in InstaClips, while saving data with AI curated content.

**20+ million**

More than 20+ million in Opera News standalone news app in Africa.

**\$ 100.000.000 USD**

In the top 20 African countries people saved an estimate of \$100 million USD in mobile data by using Opera products in 2018.

## Rapid Digitalization fueling Opera's growth

Africa is a region set for a rapid digital expansion. The 2019 Digital report by WeAreSocial, names a total of 437 million African internet users across the continent<sup>1</sup>. The report also shows that as for the full year of 2018, a total of 38 million Africans became new internet users and are now able to explore the web. The same report shows that internet usage throughout mobile devices is on high demand among Africans. From January 2018 to January 2019, a total of 51 million people got a new mobile subscription. Additionally, another report from GSM from 2018, forecasts that by 2025, Africa will get 300 million new internet users<sup>2</sup>.

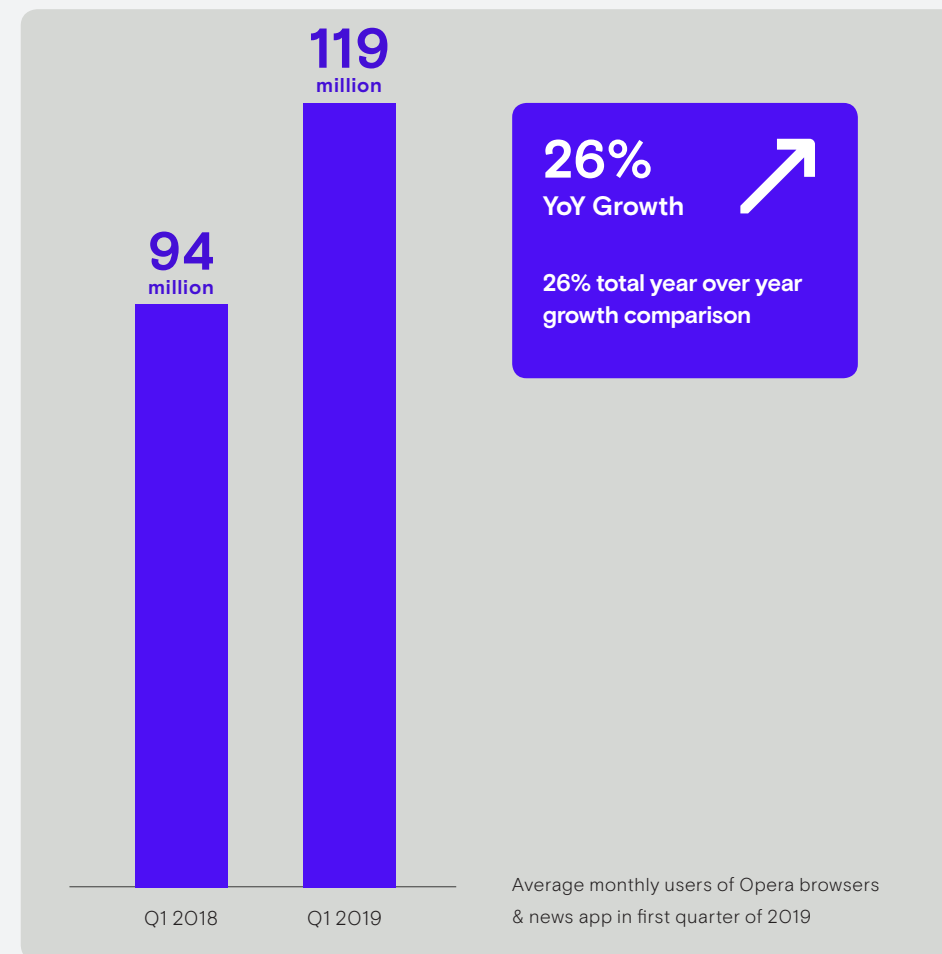
Opera is growing its user base in this expanding market. From the first quarter of 2018 to the same period in 2019, Opera grew its mobile user base in Africa by 26%. This represents a total of 25 million incremental monthly active users (MAU) across browser applications and stand alone news app in the African region.

The fact that Opera applications have a growth rate two times higher than new internet users in Africa is partly attributed to the relevance and

popularity of the Opera brand among Africans. Recent surveys conducted in 2019 in South Africa<sup>3</sup>, Kenya<sup>4</sup> and Nigeria<sup>5</sup>, show that eight out of ten internet users in these countries recognize Opera's browsers together with other browsers like Google Chrome. Moreover, the same surveys show that despite being a new application in the market, Opera News became the most recognized news app in these countries. In Nigeria and Kenya, seven out of ten people identify our Opera News app. In South Africa, almost half of the internet users identify the Opera News app together with other news sources such as BBC and Google News.

Overall, Opera's mobile and PC user base in Africa increased with more than 25 million users.

## Fast growing: Opera apps in Africa





# Smartphone transition is key for faster adoption of Opera apps

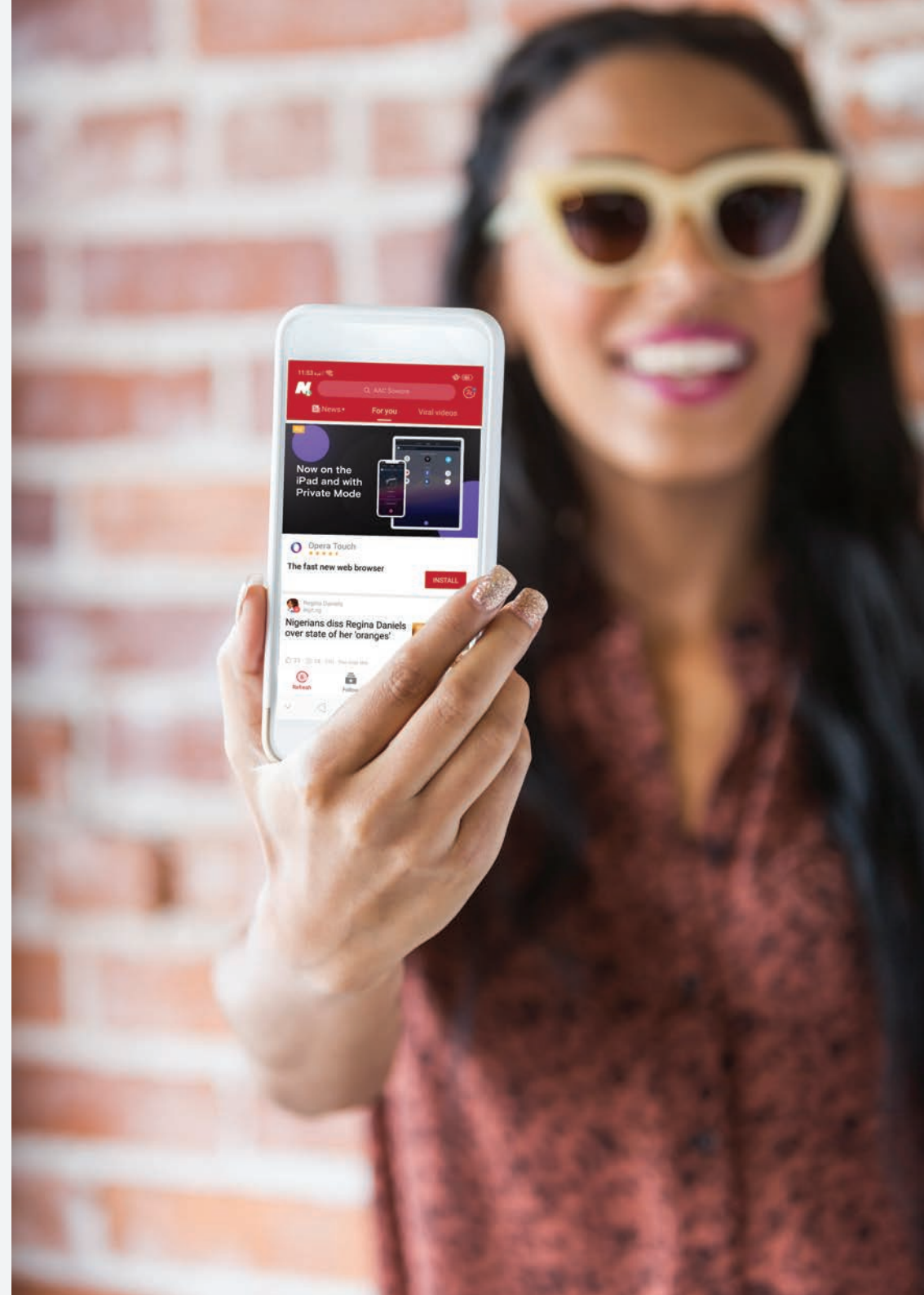
**Smartphone adoption in Africa brings new opportunities for mobile developers like Opera to grow their user base. According to Statcounter Global Stats<sup>6</sup>, Android is by far the most preferred operating system in the African region with 83% of the market share, followed by iOS at 10%. The usage of remaining platforms including Windows, Nokia and BlackBerry, is slowly dropping with a decline 11% on a yearly basis.**

The continuous adoption of smartphones has been increasingly important for Opera to provide unique applications for high-end smartphone users. This strategy is proven effective with high growth of our flagship mobile browser, Opera for Android. From the first quarter of 2018 to the same period in 2019, Opera for Android increased its user base by 40% in Africa.

The usage of Opera for Android surged after the inclusion of new and unique features that include a free VPN and a crypto wallet. Additionally, this increase also relates to the partnerships that Opera has with smartphone manufacturers in Africa. In this context, Opera for Android proved

strong growth among high-end smartphone users who prefer our most sophisticated browser. As for iOS, Opera launched a new product, Opera Touch, providing also iOS users with key Opera features like a native ad-blocker.

From the first quarter of 2018 to the same period in 2019, Opera for Android increased its user base with 40% in Africa.

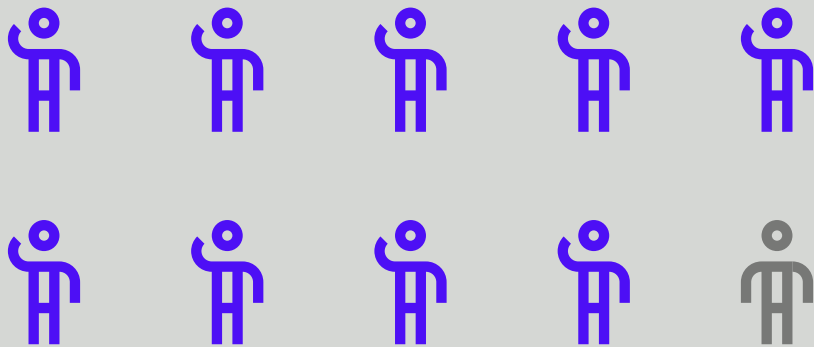


## Nine out of ten people use their mobile browser every day

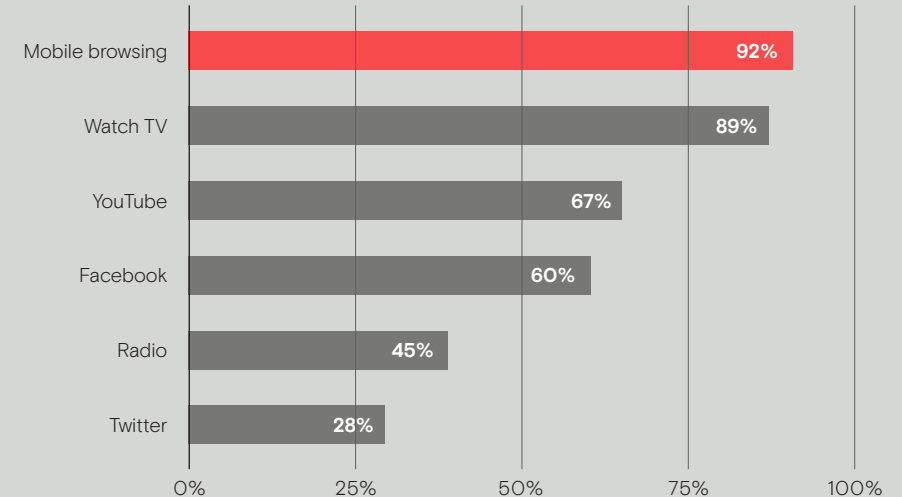
While there is significant competition on smartphones from other categories of applications, mobile browsers have remained a highly popular category of apps. A recent survey made in South Africa<sup>7</sup>, revealed that nine out of ten people use their mobile browser every day on their smartphone. This was ahead of the use of apps like YouTube at 65% and Facebook at 60%.

Also, a significant portion of the traffic to those services are made through the mobile browsers, illustrating the significance of mobile browsers in Africa. The 2018 State of the Mobile Web Africa stated that 35% of South Africans preferred to use their mobile browsers rather than standalone applications for accessing social media<sup>8</sup>. The main reasons to use a mobile browser for accessing social media platforms

relate to protecting online privacy and avoiding online advertisement. The importance of the mobile browser is also shown in Nigeria where a 2018 study by Opera<sup>9</sup> showed that nine out of ten smartphone internet users stated they use mobile browsers every day. Overall, 76% of Nigerians choose to access Facebook from their mobile browser while 74% of them prefer to search for news.



## Everyday browsing habits



Percentage of respondents using media/app one or more times per day.

# Mobile browser is a massive source of social media users

Across Africa, the mobile browser is a major source of traffic for accessing social media. In Q1- 2019, Opera Mini registered that 31% of browsing sessions are to social media platform domains, with Facebook, YouTube, and Instagram being the most popular ones.

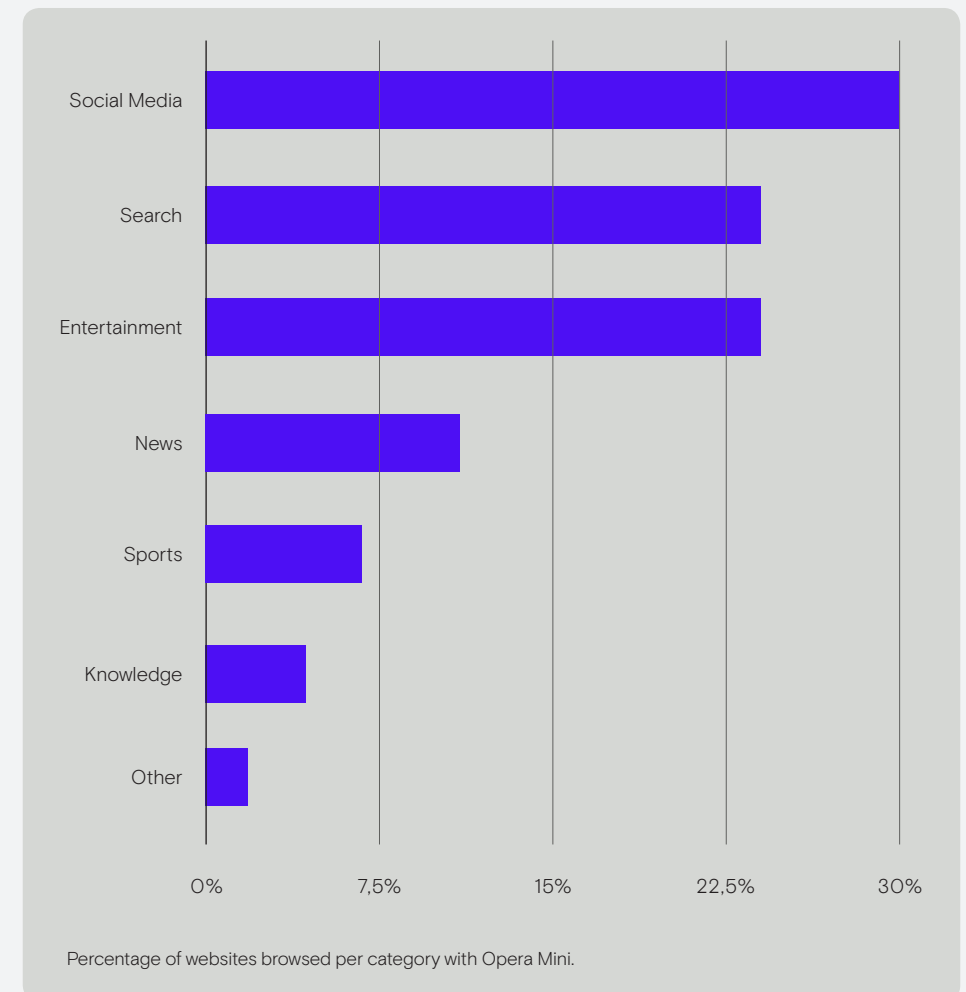
In South Africa, a recent survey<sup>10</sup> showed that people are accessing video platforms such as YouTube more often than other platforms like Facebook. Moreover, the survey also reported that 50% of South African internet users read news articles everyday. Often they prefer to access social media platforms for news consumption rather than reading print media.

In Nigeria, Facebook is still the most relevant social media platform. An Opera survey from 2018<sup>11</sup> revealed that eight out of ten people access Facebook on a daily basis. A detailed look into the Opera Mini user base in Nigeria in Q1-2019 showed that 55% of Nigerians prefer to access Facebook from the mobile browser. In the same period, Facebook also ranked as the most accessed platform from mobile browsers in Kenya and Ghana, with 40% of the Opera user base using the browser for this purpose.

Opera mobile browsers are also a gateway for people in Africa to access video content. In March 2019, statistics from Opera show that Tanzanians are more likely to access YouTube from their mobile browser than people in countries like Nigeria or Kenya. In this period, 23% of the Opera Mini user base in Tanzania accessed the video platform, while in Nigeria and Kenya, only 17% of the user base accessed this platform.

Overall, Opera's mobile and PC user base in Africa increased with more than 25 million users.

# Mobile browser activities







## More than 30 minutes of daily browsing with Opera Mini



**Opera has a significant focus on how much time people spend browsing the web. On average, Africans using Opera spend more than 30 minutes browsing on a daily basis.**

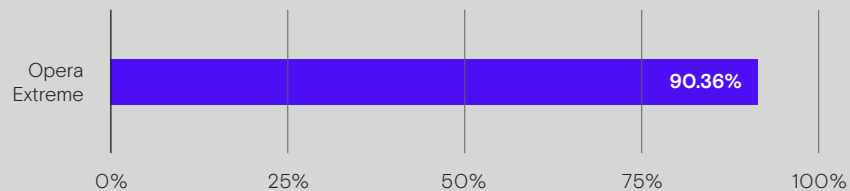
The most browsed category of websites were social media platform domains such as Facebook, YouTube and Instagram, followed by search engine websites like Google and entertainment/video and sport websites.

This split of the categories was determined by Opera after making an analysis of the top 20 most visited websites across the African region, based on the browsing behaviour of the Opera Mini user base.



# \$100 million dollars saved in mobile data

## Data saving test results Opera Mini

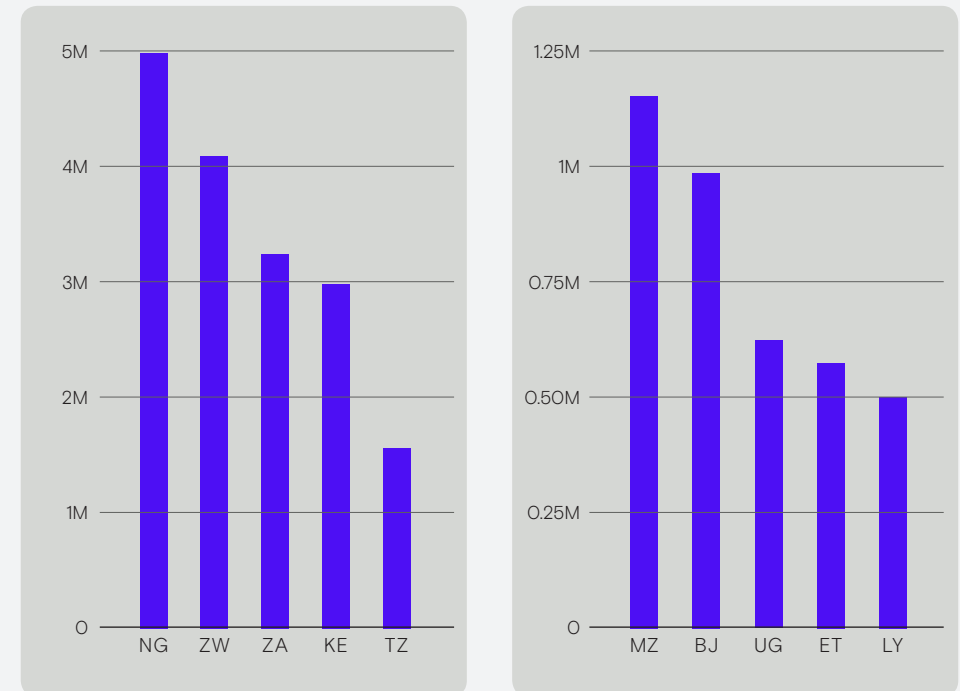


**All Opera products feature data saving capabilities, made to ensure faster and cheaper browsing almost regardless of the network conditions.**

The data compression mode in Opera Mini has the capability to pre-process and reduce the amount of data from a website before it reaches the user's

phone. This allows faster navigation, increases the browsing speed and extends the user's data plan. For Opera users, this means they get more value out of their data costs, while enjoying a better internet experience even when network conditions are less than optimal. The 2018 data saving test<sup>12</sup>, reported that the extreme data compression mode in Opera Mini is capable of saving more than 90%

## Top 10 Opera Mini savings per country (USD)

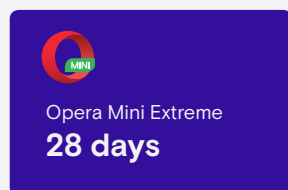


Estimated yearly saving for Opera Mini user base (USD).

of mobile data. The test compared the capabilities of Opera Mini and other browsers by loading a list of the top ten most visited websites in Kenya, Nigeria and South Africa according to SimilarWeb during the summer of 2018. The test showed that the data compression mode in Opera Mini is capable of reducing web page sizes by 90%. The test also found that the average web page size was

3MB, while Opera Mini only loaded 0.3MB of data per website. These results proved that people who use a default browser without data compression may spend significantly more money on mobile data than those who choose Opera Mini. On average, people who browse with Opera Mini are able to get nine times more out of their mobile data than using browsers without data compression.

## 1 Gigabyte of data will last 9 times longer with Opera Mini Extreme



1	2	3	4	5	6	7
No data compression						
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
Opera Mini Extreme						
29	30	31				

Amount of days a 1GB data package will last with average browsing per user.

Across Africa, Opera users saved an impressive 77 petabytes (77 million gigabytes) of mobile data in 2018 due to the data saving features in Opera's products.

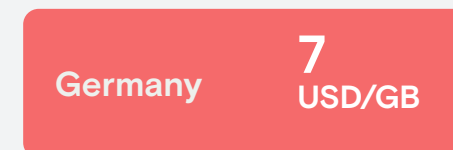
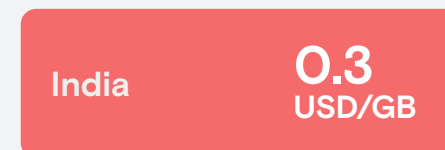
When considering mobile data costs from the recent report presented by Cable UK 2018<sup>13</sup>, using a shortlist of the top twenty African countries, the amount of gigabytes saved translates to nearly 100 million dollars.

On average, South Africans pay around 7.19 USD for one gigabyte of mobile data which is 28 times more expensive than India, and almost the same price as Germany. In Q1-2019, the Opera Mini user base in South Africa saved more than 3 million USD

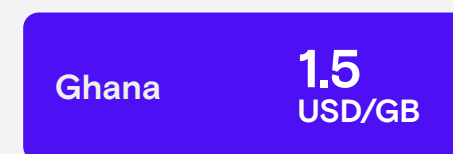
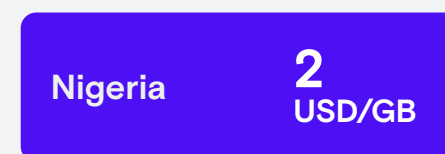
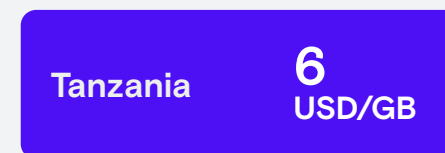
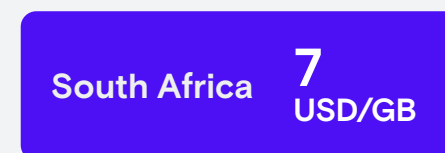
on mobile data, or equal to R47 million, by using the data compression technology of the browser. In Nigeria mobile data costs are five times cheaper than in South Africa, and four times cheaper than in Germany. In total, Nigerian Opera Mini users saved more than two million gigabytes in the first quarter of 2019. This equates to approximately 20 million USD, or 1.5 billion NGN for users who enable data compression mode on the browser.

Moreover, Kenyans pay eleven times more than Indians for one gigabyte of mobile data, being one of the countries with the highest cost of mobile data after South Africa. In the first quarter of 2019, the Kenyan user base of Opera Mini saved approximately 3 million USD or 304 million KES.

## The cost of data per Gigabyte Germany and India vs African countries



Versus



# The number one news app in Africa

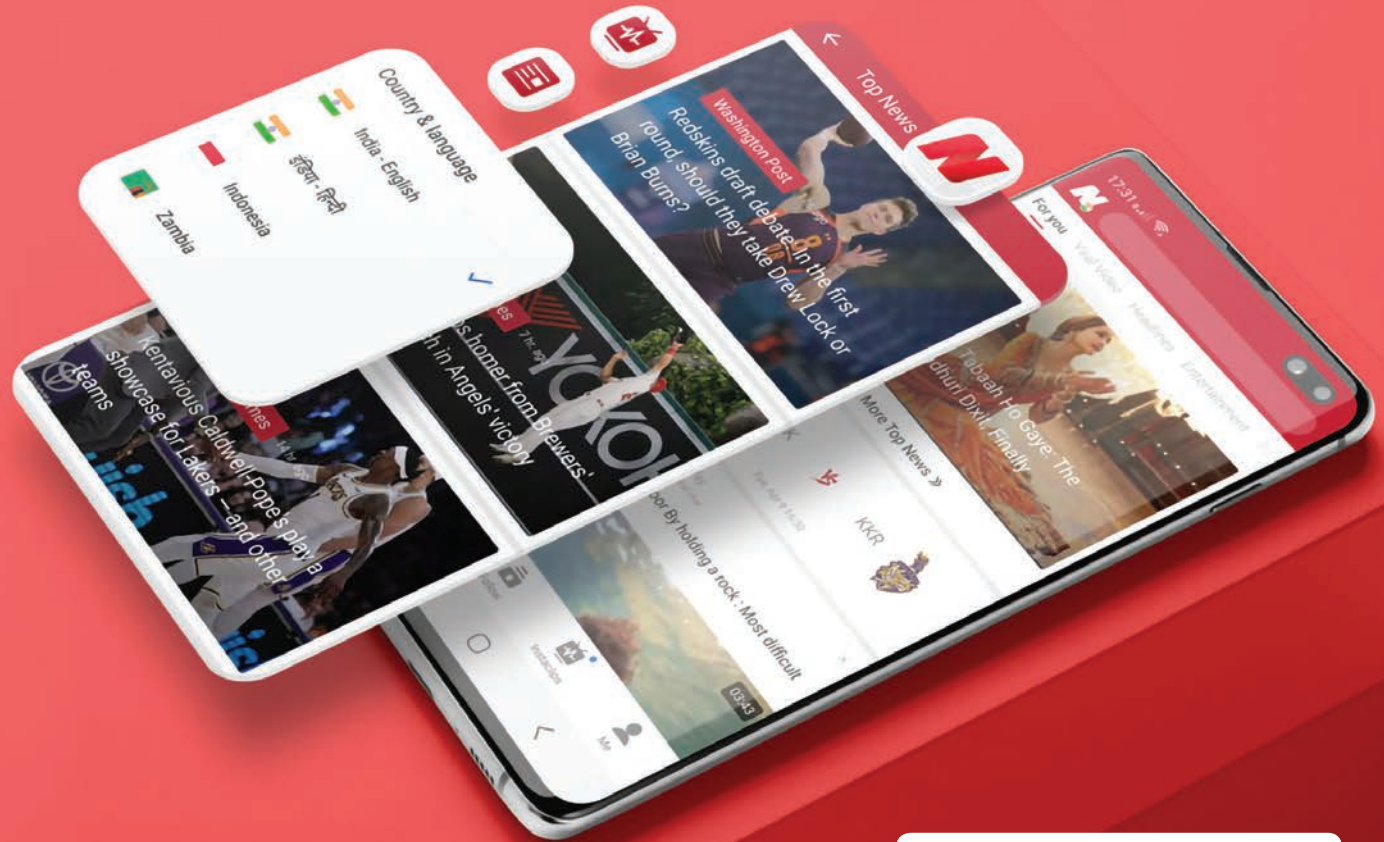


Opera News

Opera News is both a service inside Opera's mobile browsers and a standalone content platform app for Android and iOS. Globally, the Opera News service has a reach of more than 150 million monthly users.

Launched in January 2018, Opera News provides an AI-based, personalized content stream that serves daily content on top news, trendy videos and content from more than 40 different categories. Similar to the Opera browser, users of the Opera News standalone app also benefit from Opera's unique data saving capabilities.

By Q1-2019, the application was the most downloaded news app for Android devices in Nigeria, Kenya, South Africa and Ghana according to AppAnnie.



## 150 million

Used the Opera News service globally in the app and mobile browsers in the first quarter of 2019.



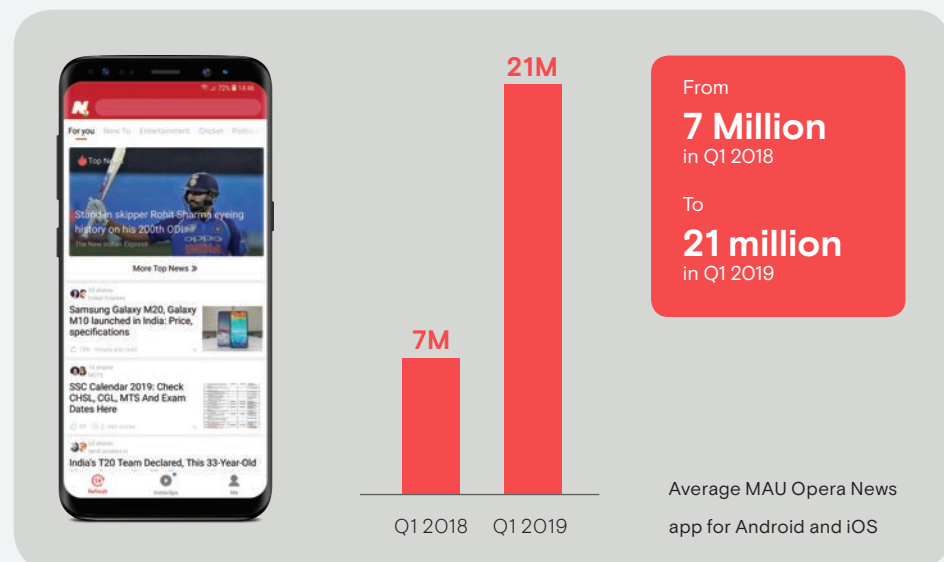
## News app from zero to more than 20 million African users

Opera News quickly became the most downloaded news app in Africa reaching more than 10 million downloads on the first six months after its launch in the market. Its popularity increased during the last football World Cup in the summer of 2018 as the app added dedicated channels with live football scores and news about the world cup.

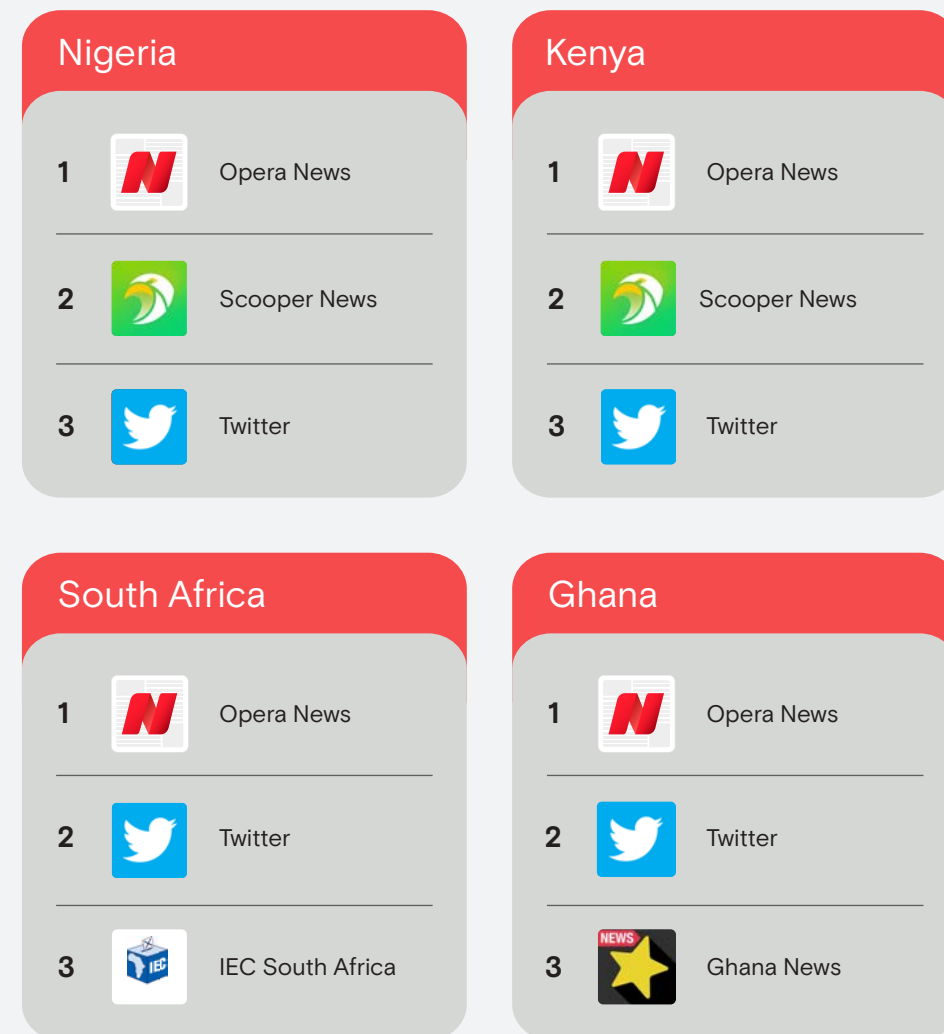
In the first quarter of 2019, the standalone Opera News app reported over 20 million monthly active users across Africa, with Nigeria

as the biggest single market, and more than 30 million users globally. The total user number for the Opera News service, when including its distribution through the Opera browsers, was 150 million globally. Today, Opera News is available in Africa in several local languages, including English, Swahili, Arabic, Portuguese and French.

Opera News is the most popular news application in both Nigeria and Kenya in terms of both downloads and brand awareness<sup>14</sup>.



## The most popular news app in several markets

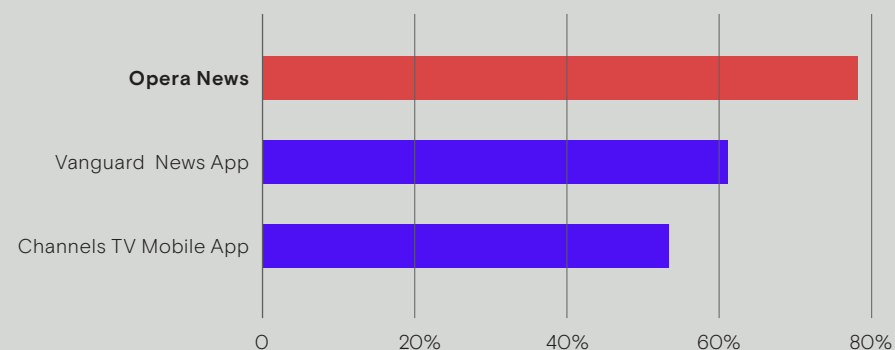


Downloads charts Google Play. Source AppAnnie March 2019

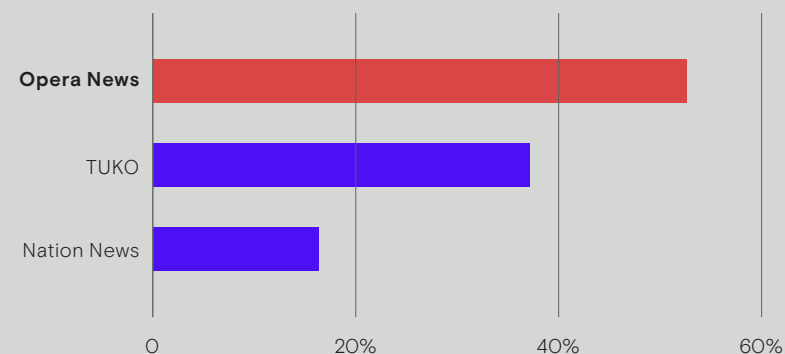
Already the most  
known news app



### Most recognized news apps in Nigeria Q1 2019



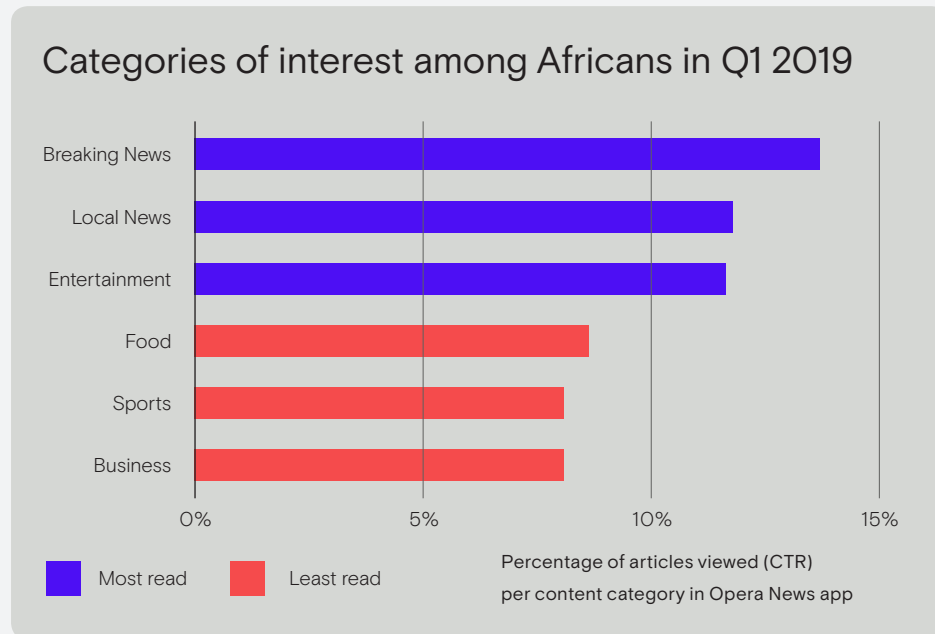
### Most recognized news apps in Kenya Q1 2019



Amount of people recognize product brands



## Breaking and local news are the most popular categories in Opera News



**Opera News classifies its news content into more than 40 different categories. In the first quarter of 2019, the most read category of news articles was Breaking News. This category of news stories was closely followed by local news.**

During 2018, the Opera News app was deeply localized for African countries and major efforts were made to help people find relevant local news stories. The third most read category was entertainment news. On the other end of the scale, the less popular articles included

food and business. It is however important to note that Opera News users consumed a wide variety of articles from almost any type of the category shown in the app. This is an expected consequence of the AI-powered personalization engine which feed content to the users that is hyper relevant to their own interests.



## Opera News users spend 50% of in-app time watching videos



**At the very end of 2018, Opera News introduced Instaclips, a new feature that allows people to upload, share and watch entertaining videos from the web. Already in the first full quarter of the service being available, Opera News users in Africa uploaded 122 thousand videos to the platform.**

The feature quickly gained popularity among the Opera News user base, with time spent on video content from this new feature growing quickly. By Q1-2019, on average, our African users spent

more than 50% of their time in Opera News watching videos on Instaclips – a clear sign of engagement considering the service has been live for only three months. The majority of the end user generated content was in English, reflecting Opera's significant user bases in Nigeria, Kenya and South Africa.



# Afterword

Africa is a continent which is undertaking a rapid digital transformation. The 2019 State of Mobile Web report provided insight into some of the trends and growth challenges of African internet users, as they rapidly adopt smartphone devices. At Opera we see that mobile data cost still remains a challenge across Africa. Our data compression technology saved more than 100 million dollars in mobile data costs in 2018, something we believe a lot more users in Africa also could benefit from. The growth of our Opera News platform illustrates how the digital media landscape will continue to develop with a rapid speed. A major trend to watch will be how the consumption will continue to move forward towards video, which we believe will become increasingly important.

Opera has significant ambitions for Africa and we continue to be among the leaders of this digital transformation. With more than twenty years of experience tailoring products for this market, we set out in 2017 with new growth plans to invest one hundred million dollars in Africa. Since then, we have pursued an Africa-first strategy, launching many of our new applications and services in this region before expanding to other geographies. We believe this has provided us with products better tailored for the market than our competition.

Today, we continue to develop unique browsers that among other benefits, continue to bring people in Africa a faster web experience. But while this report emphasizes the importance of browsers, Opera has already expanded much beyond our origin with the news aggregation platform, as well as our Fintech operations, and we continuously seek out further expansions to continue accelerating the digital shift in Africa.



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## Page 8 Rapid digitalization fueling Opera's growth

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## Page 14 Mobile browser is a massive source of social media users

10. Pollfish online panel: Opera Brand Survey South Africa 2019
11. Pollfish online survey: Opera News leading News App in Nigeria 2018

## Page 19 100 million dollars saved in mobile data

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## Page 24 News app from zero to more than 20 million African users

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