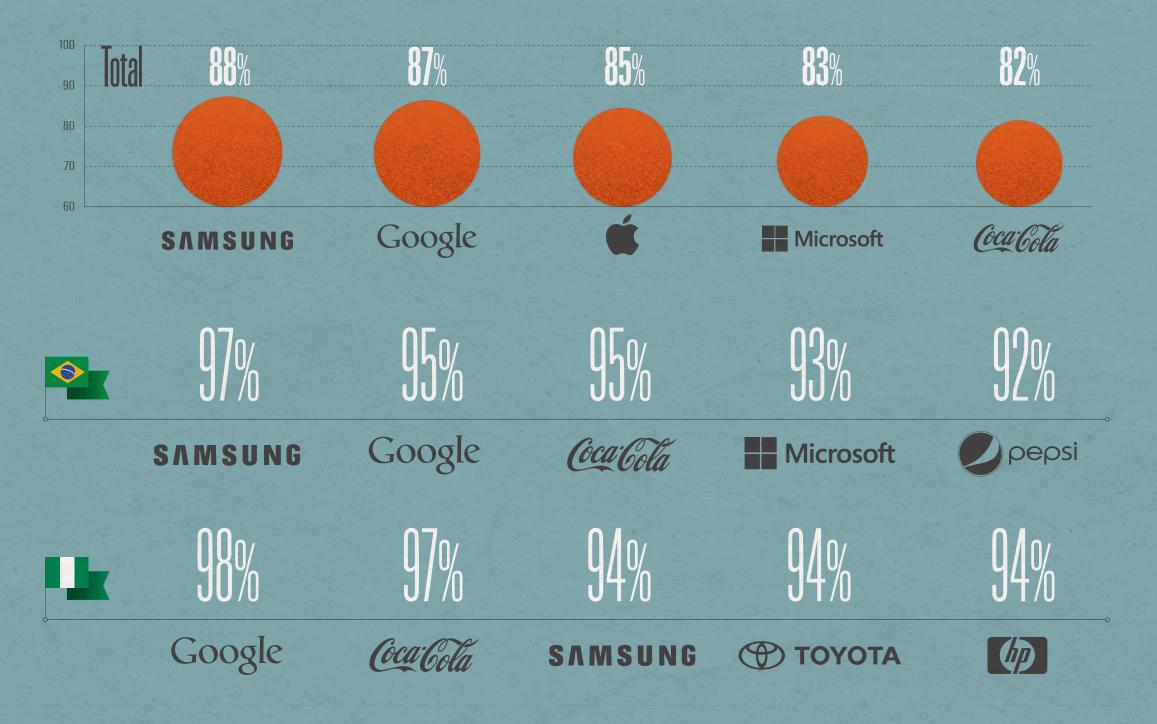
THE NEXT MOBILE FRONTIER

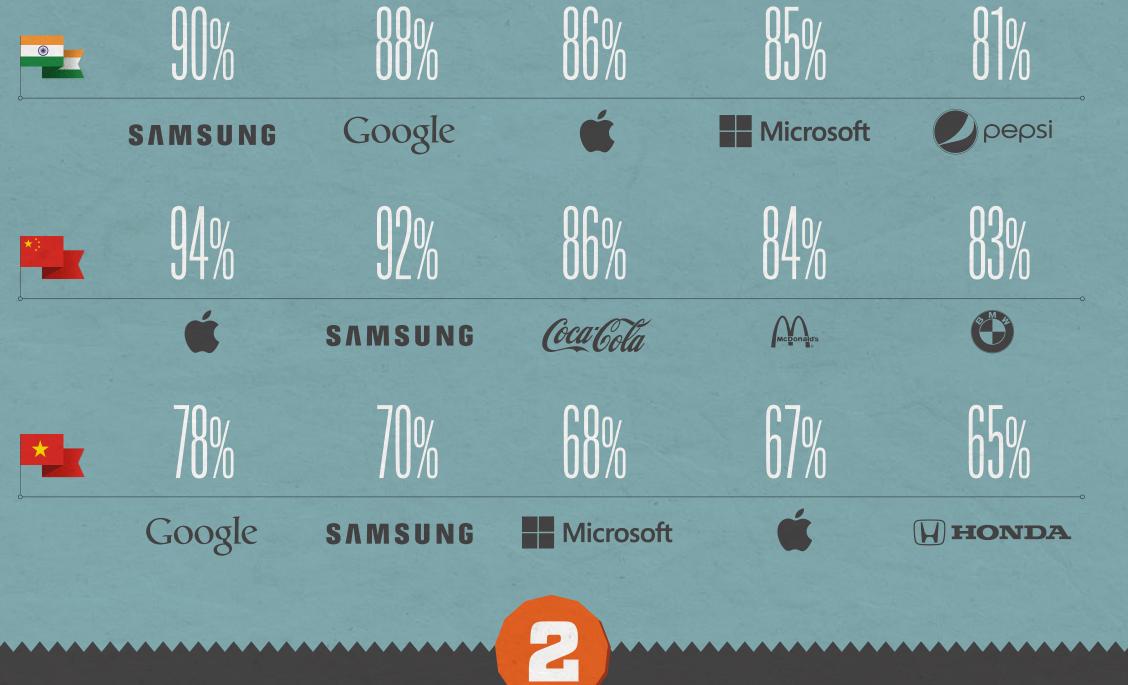
The Battle For Consumers:

GLOBAL VS. LOCAL BRANDS

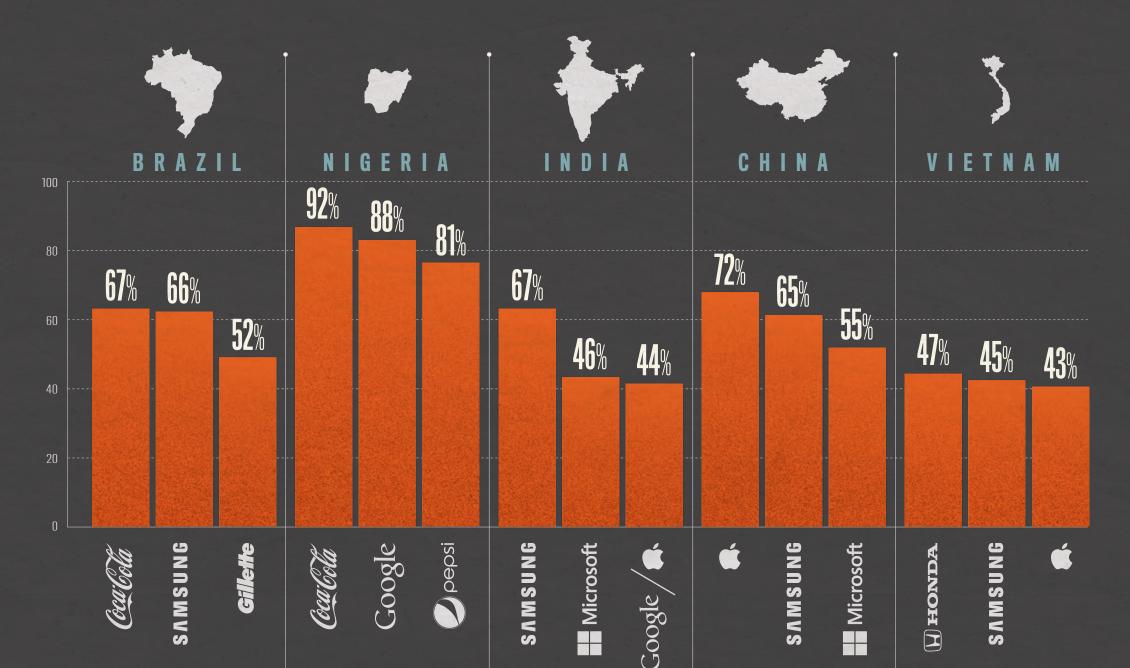
TOP 5 RECOGNISED WESTERN BRANDS IN EMERGING MARKETS

1

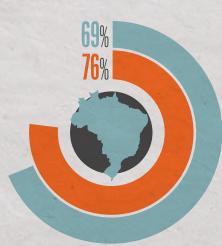




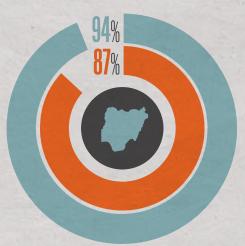
TOP 3 BRANDS CONSUMERS CURRENTLY SPENDING OR WANT TO SPEND MORE MONEY WITH



APPI. 6-1 YT VHEN YOU ILE. CONSI \mathbf{ER} B ONTENT **FROM LOCAL/GLOBAL** APPS 5? AND BR



BRAZIL Their content is familiar and easy to understand Their content is best in the market



NIGERIA Their content is in a language i understand Their content is best in the market

LOCAL

0

76% Their content is familiar

Their content is in a language i understand

74%

I can pay for purchases in a way that suits me

GLOBAL

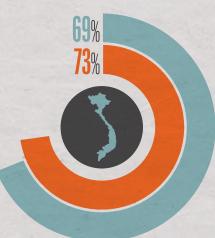
69% I trust these brands

70%

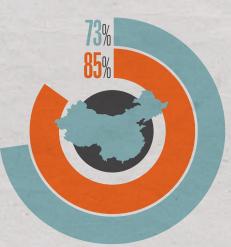
They keep me up to date with the latest developments

70%

Their content is best in the market



VIETNAM Their content is in a language i understand Their content is best in the market



CHINA Their content is familiar and easy to understand I trust these brands



INDIA Their content is in a language i understand They keep me up to date with the latest developments

HOW IMPORTANT IS IT FOR WESTERN BRANDS TO PROVIDE LOCALIZED CONTENT FROM THE CATEGORIES BELOW?

| | BRAZIL | NIGERIA | | CHINA | VIETNAM | TOTAL |
|------------------------------------|--------|---------|------------|------------|------------|----------------|
| NEWS | | | | | | |
| GAMING | | | | | | |
| MUSIC (C.) | | 0 | | | | |
| ENTERTAINMENT 🙂 | | | | | | |
| SOCIAL Networking | | | | | | |
| BUSINESS/ FINANCIAL SERVICES | | | | | | |
| HEALTH SERVICES | | | | | | |
| | | | • VERY IMF | PORTANT IM | PORTANT QU | JITE IMPORTANT |

... Upstream The Mobile Monetization Powerhouse



The 'Next Mobile Frontier Report' is a custom consumer study led by Ovum on behalf of Upstream. The survey covered 4,504 consumers, with nationally representative samples in Brazil, China, India, Indonesia, Nigeria and Vietnam. The survey fieldwork was carried out between 31 January -14 February 2014