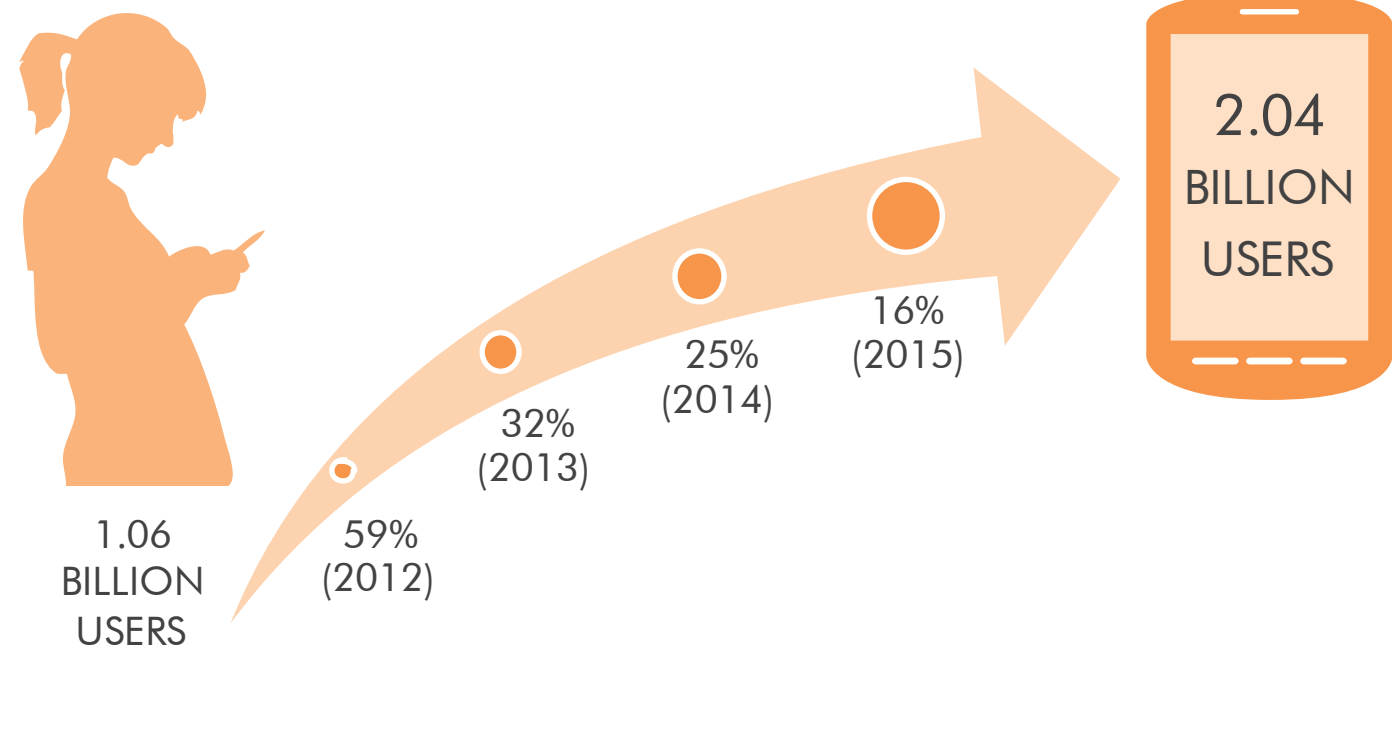


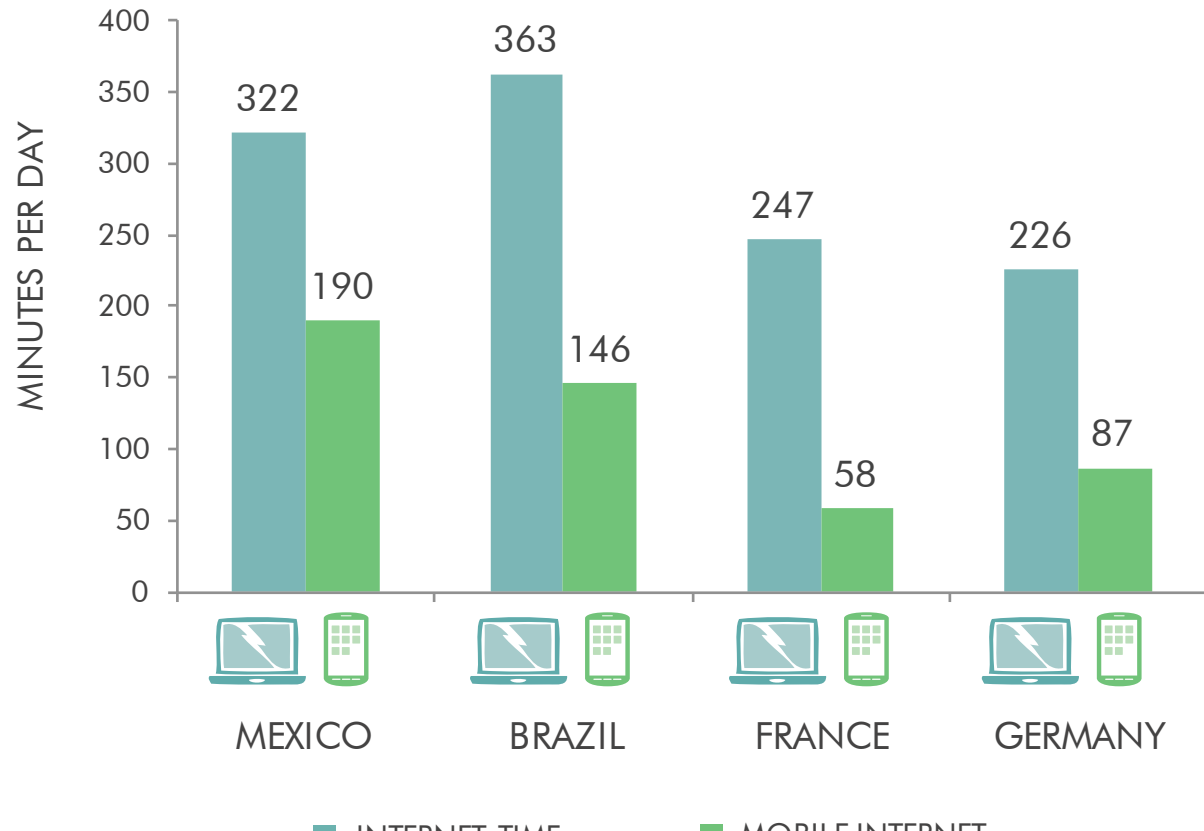


The proliferation of mobile technology has given rise to a new type of global consumer, one who is constantly connected to his or her mobile device.

THE NUMBER OF SMARTPHONE USERS HAS DOUBLED OVER THE PAST 3 YEARS.



FORECASTERS PREDICT THAT MOBILE WEB WILL EXCEED NON-MOBILE ACCESS GLOBALLY BY MARCH 2017.

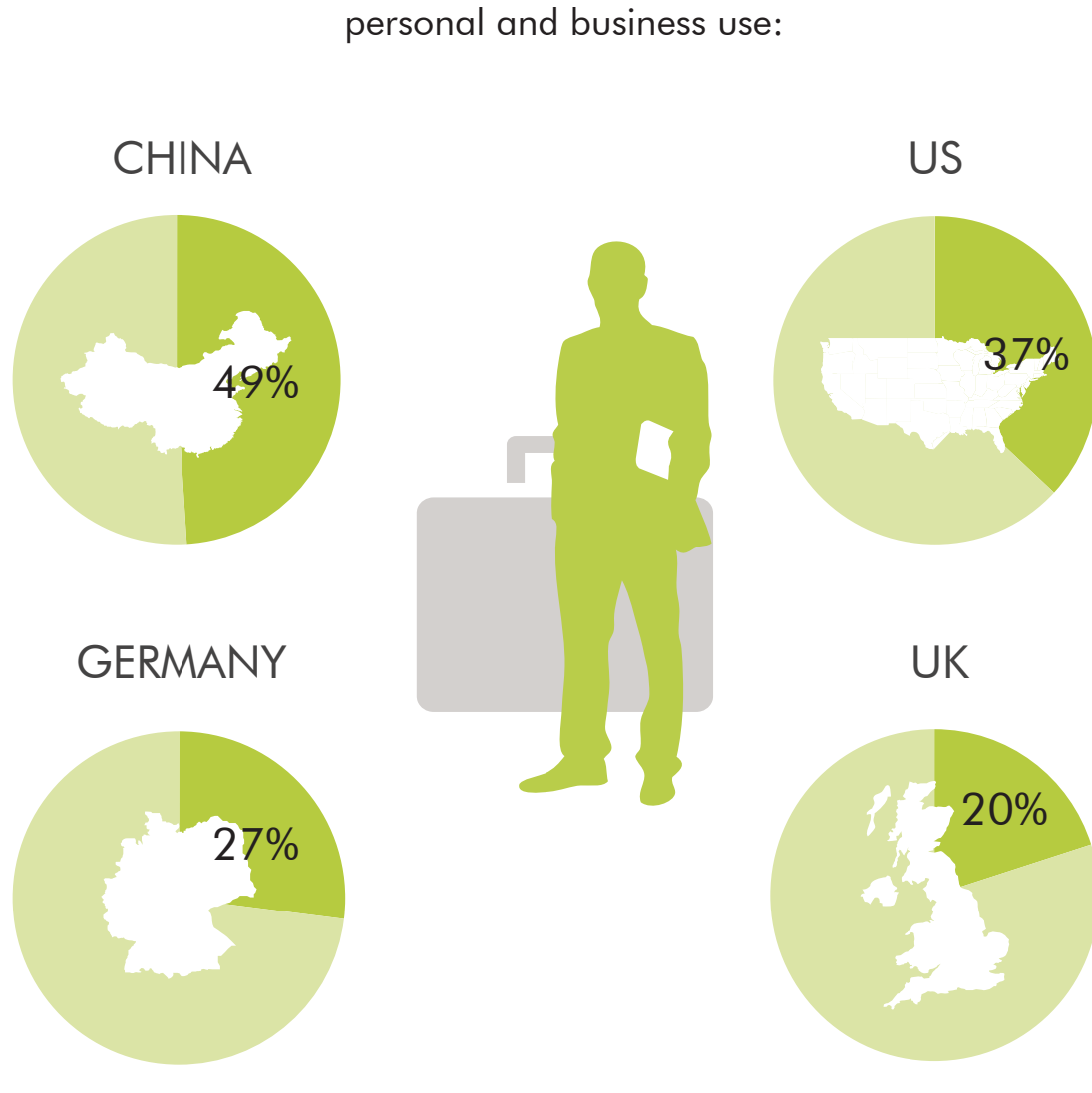


Latin Americans are heavier internet users than Europeans, with Mexicans spending over three hours per day using mobile internet on their phones

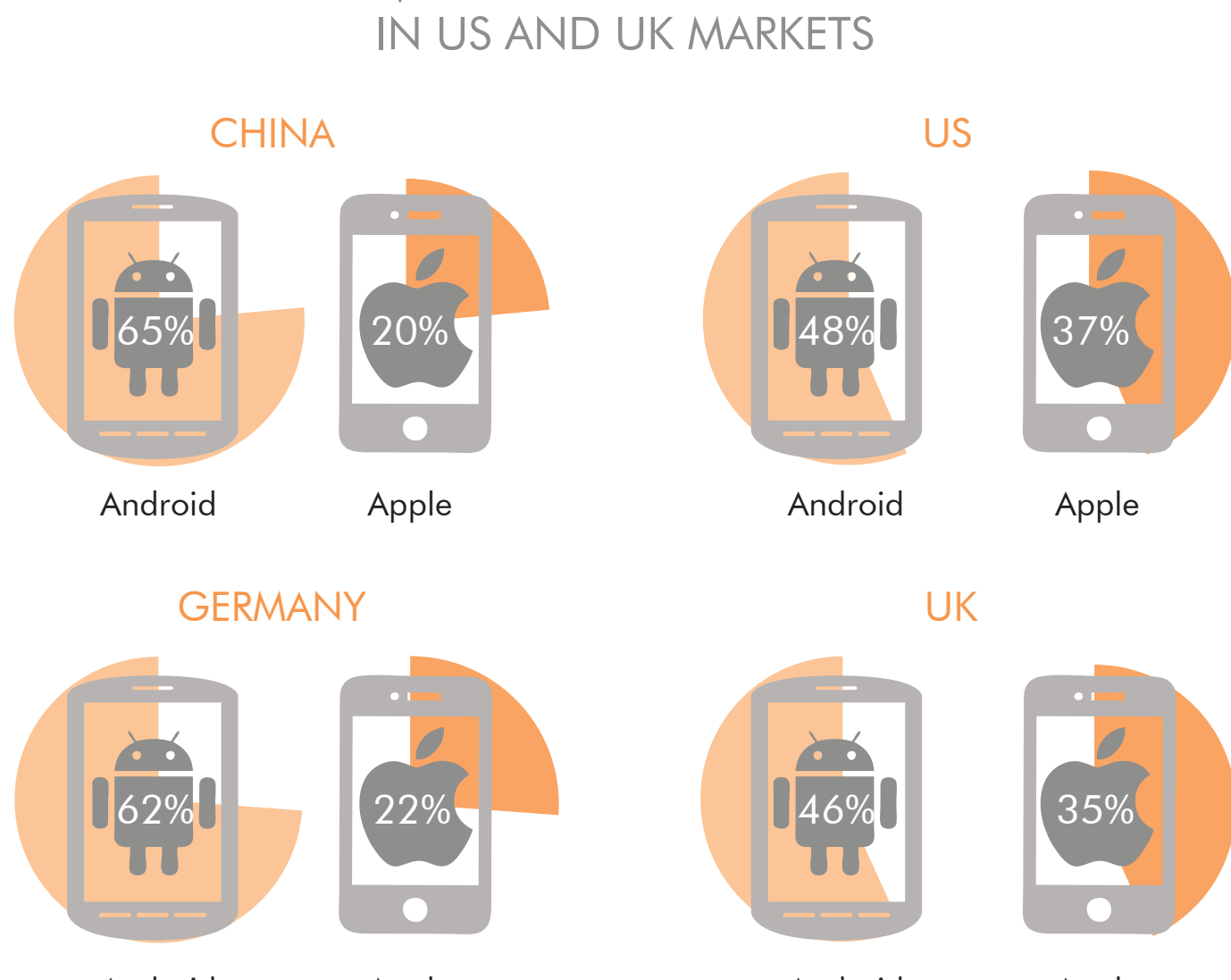
CONSUMERS ARE REACHABLE THROUGH THEIR MOBILE PHONES AT ALL TIMES OF THE DAY

FOR MANY, PERSONAL AND WORK LIVES ARE COLLIDING...

Percentage of smartphone owners who use the same phone for personal and business use:

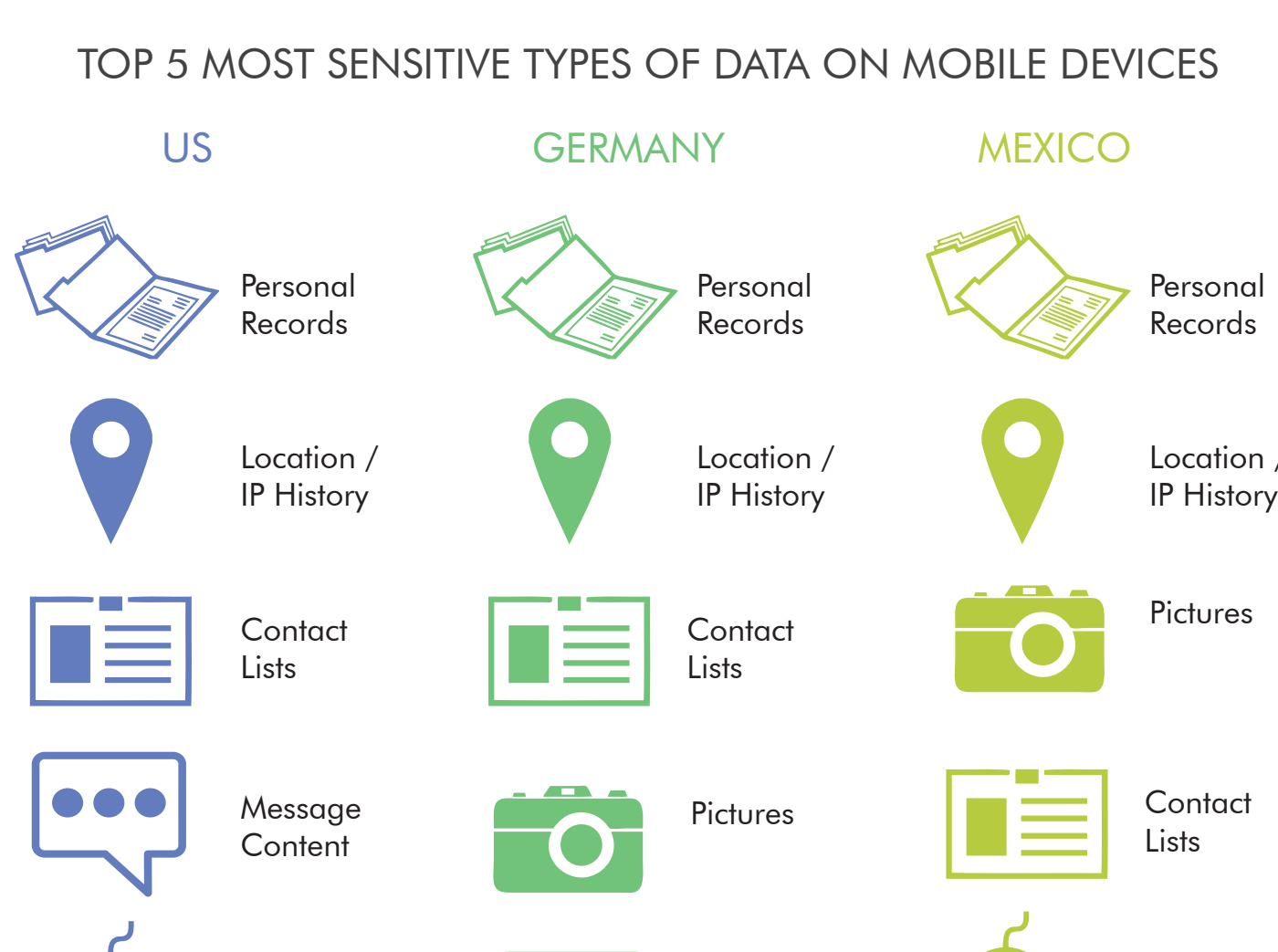


ANDROID PHONES DOMINATE IN CHINESE AND GERMAN MARKETS, BUT IPHONES HAVE A LARGE PRESENCE IN US AND UK MARKETS

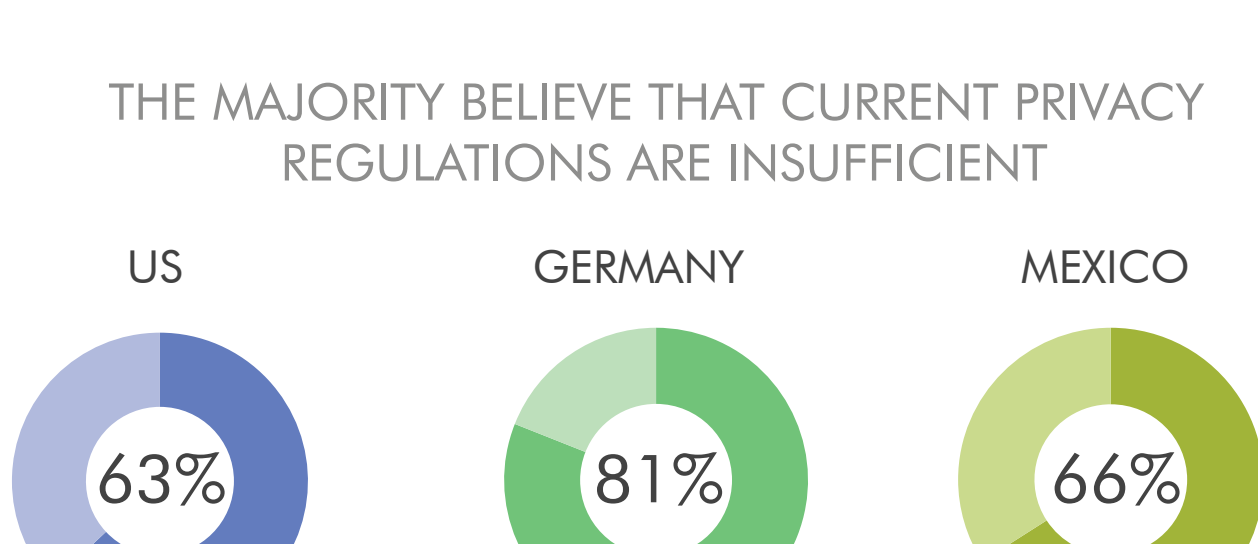


POTENTIAL DIFFICULTIES WITH COLLABORATION DUE TO GLOBAL CONCERNS ABOUT MOBILE PRIVACY

TOP 5 MOST SENSITIVE TYPES OF DATA ON MOBILE DEVICES



THE MAJORITY BELIEVE THAT CURRENT PRIVACY REGULATIONS ARE INSUFFICIENT



MOST PEOPLE BELIEVE THAT THE GOVERNMENT OR COMPANIES CAN ACCESS YOUR INFORMATION ON MOBILE WITHOUT PERMISSION



COMPARED TO SURVEYS COMPLETED ON A PC, RESPONDENTS ARE WILLING TO SPEND...



Longer surveys are therefore not suitable for mobile phones

SOURCES

eMarketer – Global Mobile Landscape 2014 – March 2014
 Lightspeed Panel Profiling Data, November 2014
 Lightspeed GMI Mobile Privacy Internal Research, October 2014
<http://www.slideshare.net/wearesocialsg/social-digital-mobile-around-the-world-january-2014>
 Lightspeed GMI Internal Research, 6 countries - US, UK, BR, MX, SING, AU - November 2013