

Hyper-Local Content Is Key— Especially Social Media

A Cross-Country Comparison of Mobile Content in Brazil, China, India, and Nigeria

Until recently, smartphones have been used exclusively in the developed world, but they are now increasingly making inroads in Latin America, Africa, and Asia. Consumers across emerging markets are keen to use mobile apps, but they face significant barriers. For instance, more than one-third of consumers in developing nations find content too expensive, and app stores, which usually are driven by mobile networks or brands such as Google and Apple, require access to credit or banking facilities. Translation presents another major obstacle; many mobile users cannot find the content they are searching for—or any content at all—in their local language.

Consumers in emerging markets expect to interact primarily with highly localized mobile social networks and health services, followed by music and entertainment content, and then gaming. This is not to say that news and business content are less important—consumer interaction with all types of content must be taken seriously in order to understand attitudes toward and perceptions of mobile.

Upstream’s “The Next Mobile Frontier Report”—a survey of mobile consumers in Brazil, China, India, Nigeria (and Vietnam)—ranked content preferences as follows: social networking (82%), music (81%), news (78%), gaming (65%), lifestyle (54%), books (53%), business or financial services (46%), educa-

Marco Veremis is CEO and co-founder of Upstream, and has been Chairman of the Board since 2002. As an experienced marketing strategist at Grey Advertising, McCann-Ericsson, and DDB in London, Marco developed global and pan-European communications strategies for brands such as Nestlé, Coca-Cola, Sony, and SmithKline Beecham.

Editor’s Note: While this issue focuses on locally relevant content as a path to development, the following article takes a broader look at the importance of locally relevant content for commercial success. For those looking to scale digital technologies in development, it’s important to understand commercial trends and consumer attitudes.

tional services (41%), and health services (33%).¹ Thus, the two broad types of content most in demand are informative and lifestyle related. However, the ways consumers prefer to receive this content differ across cultures. For instance, gamification techniques might work well in one nation but not in another.²

Furthermore, 60 percent of consumers in emerging markets say that when purchasing content they react more favorably to content that is locally relevant in terms of language and payment methods. In sum, content must be hyper-local.

In this article, we compare consumer attitudes toward mobile content in Brazil, China, India, and Nigeria, using information from Upstream's "Mobile Frontier" and "Emerging Markets Mobile Attitudes" reports.

BRAZIL: THE DESIRE FOR SOCIAL AND GAMIFIED MOBILE CONTENT

The 2014 FIFA World Cup showcased Brazil as a mobile-crazed nation. It is the fifth largest telecom market in the world, with more than 272 million mobile subscriptions, nearly 80 percent of whom use prepaid phones.³ During the World Cup, which was celebrated as the largest social-media event in history, Brazil was the most active Facebook country in the world and it had more than 280 million interactions via networking outlets.⁴ On Twitter, mobile users sent more than 63 million tweets; the Brazil-Germany match alone spurred more than 500,000. With the Olympics coming to Rio in 2016, this mobile activity is likely to increase.

More than a quarter of Brazilian consumers say they are likely to trust product promotions and 60 percent enjoy receiving promotional messages, thus a key way to subsidize the cost of telecommunications is through sponsored content.⁵ However, consumers in Latin America react differently to advertisements than consumers in the West, thus brands, marketers, and content developers must work together to deliver local content that consumers in Brazil actually want.

According to Upstream's 2013 "Emerging Markets Mobile Attitudes Report," the majority of Brazilian mobile users prefer to use their devices for social media purposes (69%), followed closely by music (63%) and news (61%).⁶ Thus social content appears to be the most effective way to target the growing Latin American market.

Based on Upstream's own campaigns, it is clear that Brazilians are also hungry for gamified content. In 2012, Upstream launched a mobile campaign in Brazil called Megabolada on behalf of the four major operators in the country: TIM, Claro, Oi, and Vivo. The trivia-based game reached more than 33 million mobile users across the country—nearly one in eight Brazilians. The game designers catered directly to local attitudes. This suggests that to keep step with consumer tastes in Brazil, content must be local, social, and gamified.

NIGERIA: A QUESTION OF PAYMENT MECHANICS
AND LOCALIZED LANGUAGE

Nigeria has become a major economic powerhouse in Africa and a leading center of mobile activity.⁷ As in other developing nations, a large percentage of Nigerian consumers view a pre-paid or pay-as-you-go plan as the most convenient way to purchase mobile content, and they prefer to pay for it via their mobile bills, not credit or debit cards. Although the recent rise of mobile banking has the potential to connect consumers with content via new, streamlined processes, Nigerian consumers currently face significant payment barriers, which restricts their content preferences.⁸

According to the “Emerging Markets” report, 80 percent of Nigerian consumers are likely to use business-related mobile content, slightly outpacing social media (78%), education (74%), and health content (56%).⁹ Like Brazilians, Nigerians are not averse to receiving promotional messages with their content; a startling 93 percent of Nigerians enjoy receiving promotional content if it is relevant to their location.

In late 2013, Upstream partnered with mobile telecommunications company MTN Group to increase customer engagement in Nigeria. Upstream provided mobile content in the form of English lessons, French lessons, proverbs, quotes, history, wellness and nutrition information, and fitness tips, all of which were individualized for several local markets. The effort saw more than 17 million users—10 percent of the nation’s population—participating on an ongoing basis.

CHINA AND INDIA: NEWS AND SOCIAL MEDIA CONTENT
DOMINATE CONSUMER TASTES

Mobile usage in China and India is expanding rapidly. China is expected to receive 23 percent of the world’s smartphone shipments by 2016 and 9 percent will go to India; this compares to 15 percent in the United States.¹⁰

Smartphones already account for more than 80 percent of the phones used in China,¹¹ with Apple and Samsung in a high-profile battle for consumer attention. While Apple has recently partnered with China Mobile, the world’s largest mobile network, Samsung has lost a step. Although it is a major device provider in nearly all markets, Samsung has been topped in China by local vendor Xiaomi.¹² It is apparent that recent successes have been dictated by localization: Apple would not be successful if not for its partnership with China Mobile, and global titan Samsung has been supplanted by a recognized local brand. This trend is in keeping with the desire for local content; 90 percent of Chinese consumers prefer news content over any other type.¹³

According to the “Emerging Markets” report, nearly a quarter of Indian consumers are using smartphones as their primary devices.¹⁴ Indian consumers’ content preferences are social media (70%), education (50%), travel (49%), and health (40%). India, like Brazil, is largely a social nation, and most prefer their mobile

experiences to be defined by interactions with others. Nearly half of Indian mobile users say they would most likely purchase a device designed by their favorite social network, and they want the device to be outfitted with pre-installed social services and content.¹⁵

With more than 900 million mobile users, smartphone use in India is growing at a sizable annual rate of more than 89 percent. Moreover, Indians are willing to spend substantial amounts of money on their mobile experiences; in fact, Indians spent more than \$3 billion on mobile content in 2013, and a majority say they are prepared to spend more than \$200 on mobile devices.¹⁶

Messaging apps and platforms such as WhatsApp and WeChat have been recently introduced in India, with great success. WhatsApp is now being used by more than 600 million consumers around the globe; India is its biggest market, with more than 48 million users.¹⁷ As a comparison, WhatsApp has 45 million users in Brazil, but growth there is stagnant, whereas growth in India is exploding. The key consideration of mobile consumers in India, then, is how Indians can best carry out their social networking needs, taking into account that these social networks must be localized.

WINNING CONTENT: HYPER-LOCAL, HYPER-SOCIAL

In emerging markets, social content trumps news and entertainment, and this strong preference could signal the demise of brands and providers that do not provide relevant social content. Social content is number one in Brazil (69%) and India (70%), while Nigerian consumers put business content (80%) slightly ahead of social content (78%). Music is popular in all three countries; educational content is valued highly in Nigeria (74%), but less so in other countries. Nearly half of consumers in Brazil, Nigeria, and China said they'd like more health content.

Equally as fascinating as content preferences are the device wars across Brazil, Nigeria, India, China, and Vietnam. When asked which mobile brand they would like to purchase next, consumers in China (42%) and Vietnam (36%) indicated Apple, while Samsung was the choice in India (36%) and Brazil (37%). In Nigeria, HTC was the winning brand, at 16 percent. Content development and distribution will no doubt be a crucial point of comparison for all device manufacturers moving forward.

Mobile providers in developing nations are still building out their mobile networks to suit the needs of contemporary mobile platforms, and users in developing nations expect a high level of local detail. Localization clearly requires more than merely translating apps and mobile content into a user's language. In fact, the entire mobile experience must be tailored to suit cultural flavors, factors, and expectations based on location.

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