

ASIA-PACIFIC M-COMMERCE SNAPSHOT 2015

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About yStats.com

- yStats.com provides secondary market research.
- Market reports by yStats.com inform top managers about recent market trends and assist with strategic company decisions.
- yStats.com has been committed to researching up-to-date, objective and demand-based data on markets and competitors from various industries since 2005.
- In addition to reports on markets and competitors, yStats.com also carries out client-specific research.
- Clients include leading global enterprises from various industries including B2C E-Commerce, electronic payment systems, mail order and direct marketing, logistics as well as banking and consulting.

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Asia-Pacific M-Commerce Snapshot 2015

General Information

Product Details

Language:	English
Format:	PDF & Power Point
Number of Pages/Charts:	47
Covered Countries/Regions:	Asia-Pacific, China, Japan, South Korea, Australia, India, Indonesia, Philippines

Prices

Single User License:	€ 950 (excl. VAT)
Site License:	€ 1,425 (excl. VAT)
Global Site License:	€ 1,900 (excl. VAT)

Questions Answered in This Report

- What are the major M-Commerce trends?
- How fast is M-Commerce growing in the Asian markets?
- What is the size of M-Commerce and its share on the total B2C E-Commerce in the key markets of the region?



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Key Findings

Asia-Pacific among the Global Leaders in M-Commerce

Globally, M-Commerce is recording high double and even triple digit growth rates, surpassing the overall online retail market in sales growth. While computers remain the device most used for shopping online, mobile has become a close second. Smartphones and tablets are the favorite mobile devices to use in M-Commerce, with their frequency of usage being close, though tablets are significantly ahead of smartphones in terms of sales generation globally. Another important trend is that apps are preferred for mobile shopping over mobile browsers.

Furthermore, the power of mobile devices in retail has gone beyond the pure online shopping. Consumers worldwide are using their mobile phones while in-store to compare prices, scan quick response codes and make purchases. This fusion of mobile and physical is in line with the general omnichannel trend that has formed on the global retail market.

Asia-Pacific is one of the global leaders last year in terms of usage of mobile for online shopping. Over half of online shoppers there made purchases via mobile devices. In South Korea, close to a third of shoppers did so on a weekly basis, with the share of M-Commerce on the total online sales topping one-third in the third quarter of 2014. In Japan, young female smartphone users under 30 years old had the highest propensity to shopping on mobile. In China, the number of mobile shoppers grew to more than two hundred millions, while in India the share of mobile shoppers on online buyers in the cities increased from just over 20% to more than a half. Meanwhile, in South East Asia, Singapore was leading in terms of mobile shopper penetration last year, followed by Indonesia.



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Samples



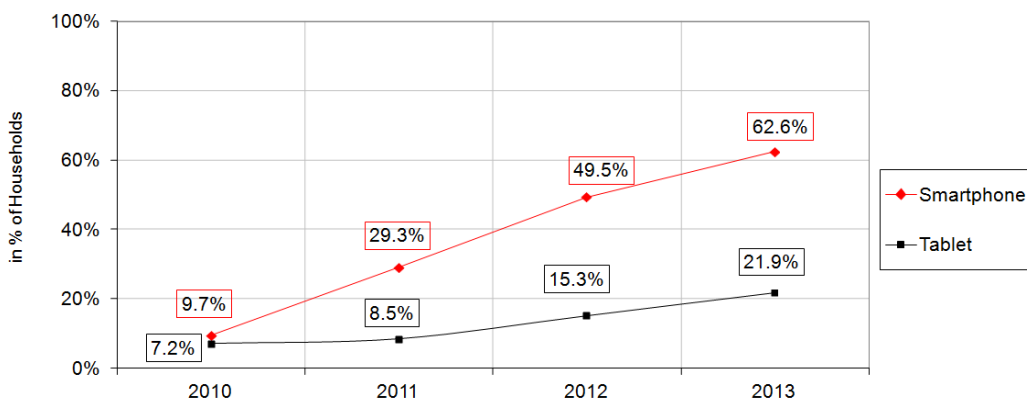
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China Japan South Korea Australia India Indonesia Philippines

Penetration of smartphones and tablets in Japan grew rapidly between 2010 and 2013, reaching respectively 63% and 22% by the end of 2013.

Japan: Mobile Device Ownership, by Smartphone and Tablet, in % of Households, 2010 - 2013



Survey: based on a survey of 22,271 households in 2010, 16,530 in 2011 and 20,418 in 2012, and 15,599 in 2013; data as of the end of the year
Source: Ministry of Internal Affairs and Communication, June 2014



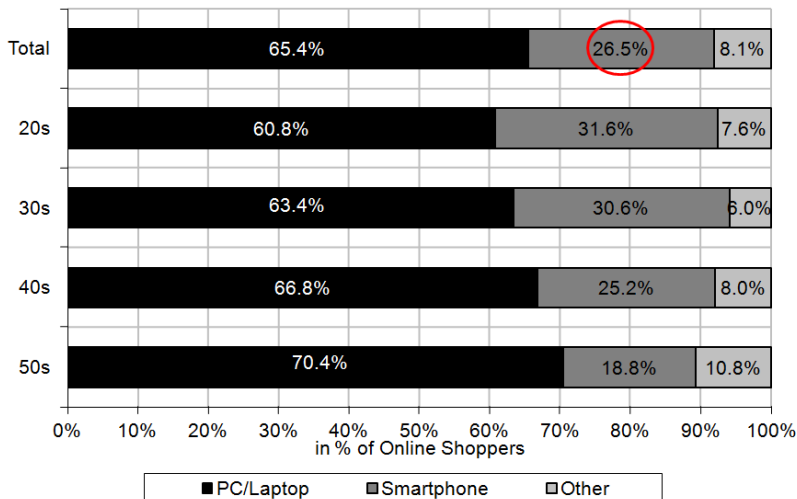
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We deliver the facts – you make the decisions



China Japan South Korea Australia India Indonesia Philippines

Consumers in South Korea did 26.5% of their online shopping via smartphones, as of September 2014.

South Korea: Breakdown of E-Commerce Utilization, by Device, in %, by Age Groups, September 2014



Survey: based on a survey of 1,000 respondents
Source: Trendmonitor, November 2014



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Methodology

General Methodology of our Market Reports:

- This report includes the results of secondary market research: By using various sources we ensure maximum objectivity for all obtained data. As a result companies get a precise and unbiased impression of the market situation.
- Cross referencing of data was conducted in order to ensure validity and reliability.
- The report contains a Management Summary, summarizing the main information provided in each chapter.
- Besides providing information on the specific topic, every chart contains an Action Title, which summarizes the main statement of the chart and a subtitle, which gives information about the country, the topic, the unit or currency, and the time period the data on the chart refers to.
- Furthermore, the source of information and its release date are provided on every chart. It is possible that the information included in one chart is derived from several sources. Then, all sources are mentioned on the chart.
- This report also includes rankings. Within these rankings, it is possible that the total amount adds up to more than 100%. If this is the case, multiple answers were possible, and this is then mentioned in the note of the chart.
- If available, additional information about the data collection, for example the time of survey and number of people asked, is provided in the form of a note. In some cases, the note (also) contains additional information needed to fully understand the contents of the respective data.
- When providing information about amounts of money, local currencies were mostly used. When referencing them in the Action Title, the EUR values are also provided in brackets. The conversions are always made using the average currency exchange rate for the respective time period. Should the currency figure be in the future, the average exchange rate of the past 12 months is used.
- This report includes mainly data from the last 12 months. The exact publication dates are mentioned in every chart.

Methodology for our Asia-Pacific M-Commerce Snapshot report:

- This report covers the M-Commerce market in Asia-Pacific.
- It opens with the chapter about global development, including market overview, trends, international comparisons and news about major players.
- In the following chapter provides information on M-Commerce in the region.
- Regional development is presented first. The countries within the regions are also presented in the order of descending B2C E-Commerce sales.
- For the countries the following information was presented, where available: M-Commerce sales, share of M-Commerce on total B2C E-Commerce sales, mobile shopper penetration, devices used for shopping online, product categories purchased via mobile. Not each type of information was presented for each country. For selected emerging markets also information about mobile Internet penetration was included, as an indicator of potential for M-Commerce development.



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Frequently Asked Questions

WHAT IS THE TARGET AUDIENCE FOR THE MARKET REPORTS?

The target group of our B2C E-Commerce reports are decision makers in top-management, for example from the departments E-Commerce, Business Development, Strategy, Marketing, etc. from large corporations worldwide.

WHAT TYPE OF RESEARCHERS ARE FINDING THE INFORMATION FOR OUR MARKET REPORTS?

yStats.com employs multilingual researchers that research and filter all sources and translate the relevant information into English. This ensures that the content of the original sources is correctly interpreted.

WHERE CAN I SEE WHAT KIND OF INFORMATION IS INCLUDED IN THE MARKET REPORTS?

For every market report, a detailed Table of Contents is available, clearly stating what information is included. All Table of Contents can be found on our homepage and in the product brochures of the market reports.

HOW DO I ORDER A MARKET REPORT?

If you would like to order, please fill out the report order from the market report included in the relevant product brochure. Afterwards, please sign it and send it back to us by fax or e-mail.

HOW LONG DOES IT TAKE ME TO GAIN ACCESS TO THE REPORT?

In general, potential clients gain access to the report within a few hours after sending out the report order form.

IS IT POSSIBLE TO PURCHASE ONLY SELECTED PARTS FROM A MARKET REPORT?

In general, the market reports are only sold as a whole. However, if you are only interested in parts of the report, please contact us.

DO I HAVE TO PAY TAX IF I PURCHASE A REPORT?

Customers from Germany have to pay an additional tax rate of 19%. Customers from the European Union (EU) do not have to pay tax if they enter a valid VAT Identification Number into the report order form. Customers from non-EU countries do not have to pay tax. Moreover, tax has to be paid for all private purchases from the EU.

HOW MANY EMPLOYEES OF MY COMPANY HAVE ACCESS TO THE REPORTS?

We offer different licensing options. Single User Licenses mean that only one user from an organization can access the report. A Site License, allowing all users within a given geographical location to access the report, is available for double the price. Global Site Licenses, allowing access to all worldwide users of an organization, are available for triple the price.

DO YOU OFFER DISCOUNTS?

If you are interested in purchasing several reports, please contact us. We will consider the possibility of bundle pricing.

WHAT SOURCES ARE USED FOR THE MARKET REPORTS?

The reports are all based on reliable sources including national and international statistical offices, industry and trade associations, business reports, business and company databases, journals, company registries, news portals and many other sources.

WHAT TYPE OF ANALYSTS ARE WRITING THE MARKET REPORTS?

After the information is researched, it is further analyzed by our international team of research analysts. These analysts have a long experience in the field of E-Commerce research, and they understand the specifications of the market.

IS THE INFORMATION IN THE MARKET REPORTS COMPARABLE FROM COUNTRY TO COUNTRY?

Due to the fact that the information included in the market reports is derived from different sources, some information is not comparable across countries. Different sources mostly have different definitions.

IN WHAT FORMAT ARE THE MARKET REPORTS DELIVERED?

The market reports are delivered in PowerPoint and PDF format. If a different format is needed, please contact us before the purchase. It would also be possible to order printed versions of the reports for a slightly higher price.

IS THE REPORT SENT TO MY EMAIL?

In general, we provide customers with access to our website. After logging in, the customer can download the report as PowerPoint and PDF files.

HOW CAN I PAY FOR THE MARKET REPORT?

An invoice issued by yStats.com can be paid either by bank transfer or by PayPal. Bank transfer usually takes a few working days, while with PayPal, the money is transferred immediately.

REGARDING THE TIMING, WHEN WILL AN UPDATE OF A MARKET REPORT BE PUBLISHED?

In general, the market reports are published on a yearly basis. For further information, please take a look at the report overview, which includes a list of the reports we plan to publish in 2014. If you would like to be informed as soon as the update is published, please inform us.

I HAVE A RESEARCH REQUEST THAT CANNOT BE ANSWERED THROUGH THE MARKET REPORTS. ARE THERE ANY FURTHER PRODUCTS?

If you require further information, we also offer "Customized Research" on all sectors and countries worldwide. After a detailed briefing, we conduct pre-research and provide potential customers with an offer.

DO YOU OFFER AN ANNUAL SUBSCRIPTION OF THE MARKET REPORTS?

Yes. Our product "Full Access Global E-Commerce Reports" gives customers access to all our E-Commerce market reports. Furthermore, access to all the market reports we publish during the subscription period is guaranteed.



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Quotes of our Customers

Travis Witteveen
Chief Operating Officer – Markets and Operations
Avira GmbH: Leading European Software Company

“As a company that operates on a global level, the research results that yStats.com provides represent significant added benefit for us. The comprehensive analyses are executed quickly and flexibly. Furthermore, they are a reliable resource for helping us to make strategic decisions.”

Iris Stöckl
Director Investor and Public Relations
Wirecard AG: Leading E-Banking Company

“The flexibility that yStats.com offers ensures that we always receive analyses, data and reports that match our needs. Fast, objective and to the point!”

Steve Rotter
Vice President of Marketing
Brightcove, Inc.: Leading Online Video Company

“yStats.com quickly and flexibly compiles the information we require. Regardless of whether we need local or transnational data, we always get the best results from yStats.com!”

Dr. Marcus Ackermann
Member of the Executive Board
Bonprix: Leading Online Shopping Company

“When we need the latest trends and statistics on the retail, homeshopping and e-commerce market, we turn to yStats.com. yStats.com turns the data into concise information that is objective and reliable. yStats.com delivers a cost-efficient and time saving research service for our company

Selected References

Internet, Consulting, Retail, Finance and Other Companies

Internet

- Google
- Amazon
- eBay
- Avira
- Skype
- Digital River
- First Data
- Citrix Online
- Wirecard
- 1 & 1
- Skrill / Moneybookers
- Deutsche Telekom
- CyberSource
- bwin Interactive Entertainment
- Brightcove

Consulting

- Boston Consulting Group
- Deloitte
- Bain & Company
- Accenture

Retail

- OTTO Group
- Costco
- Tchibo Direct
- Diesel

Finance

- Goldman Sachs
- Credit Suisse
- Morgan Stanley
- Bank of America Merrill Lynch
- Citigroup
- Oppenheimer & Co.

Other

- Red Bull
- BASF
- Lego
- Beiersdorf
- Xerox



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Selected Published Reports

Report	Publication Date	Price (excl. VAT)*
Global M-Commerce 2015: Smartphones & Tablets	March 2015	€ 1,950
Europe M-Commerce Snapshot 2015	March 2015	€ 950
Global Mobile Payment Methods 2014	December 2014	€ 3,450
Global Online Payment Methods: Full Year 2014	March 2015	€ 3,950
Europe Online Payment Methods: Full Year 2014	March 2015	€ 1,950
Asia-Pacific Online Payment Methods: Full Year 2014	March 2015	€ 950
Latin America Online Payment Methods: Full Year 2014	March 2015	€ 950
Middle East B2C E-Commerce Market 2015	March 2015	€ 1,950
MENA B2C E-Commerce Market 2015	March 2015	€ 2,450
UAE B2C E-Commerce Market 2015	March 2015	€ 750
Africa B2C E-Commerce Market 2015	February 2015	€ 1,750
Brazil B2C E-Commerce Market 2014	December 2014	€ 950
Latin America B2C E-Commerce Market 2014	December 2014	€ 2,450
Eastern Europe B2C E-Commerce Market 2014	October 2014	€ 2,950
Russia B2C E-Commerce Market 2014	October 2014	€ 950
Asia-Pacific B2C E-Commerce Market 2014	August 2014	€ 5,450
South East Asia B2C E-Commerce Market 2014	July 2014	€ 3,450
China B2C E-Commerce Market 2014	June 2014	€ 1,450
Asia-Pacific Clothing B2C E-Commerce Market 2015	January 2015	€ 950
Asia-Pacific Online Payment Methods: Second Half 2014	November 2014	€ 950
Global B2C E-Commerce Delivery 2014	May 2014	€ 3,950
Global Cross-Border B2C E-Commerce 2014	April 2014	€ 3,450
Asia-Pacific M-Commerce Snapshot 2014	April 2014	€ 1,450
Global Mobile Gaming Market 2014	February 2014	€ 1,950
Global Online Gaming Market 2014	February 2014	€ 2,950

*Single User License

Future Reports

Report	Planned Date	Price (excl. VAT)
Omnichannel Trend in Global B2C E-Commerce and General Retail 2015	March 2015	€ 950



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TERMS AND CONDITIONS

- 1. SCOPE**
 - 1.1 The following terms and conditions apply to our entire contract (the "Contract") between yStats.com GmbH & Co. KG (hereinafter also referred to as "we" or "us") with our customers regarding (i) research services, (ii) the purchase of reports, and (iii) any other contracts between us and our customers executed by reference to these terms and conditions (any reports and other services and products which we may make available to the customer under a Contract hereinafter the "Products").
 - 1.2 Any terms and conditions of our customers are hereby expressly rejected. Agreements contrary to these terms and conditions require our written confirmation. In case of deviations between these terms and conditions and the contents of the Order Forms, the contents of the Order Form shall prevail.
- 2. OFFERS, ORDERS**
 - 2.1 With respect to research services, we usually submit an offer to the customer in the form of a "Research Order Form" accompanied with a proposal stating the nature of the issue to be researched, the services to be rendered, the time required for the study and the fee due.
 - 2.2 With respect to the purchase of reports, we usually submit an offer to the customer in the form of a "Report Order Form" accompanied with product brochure stating the contents of the report and the fee due. In this respect, our customers may choose between two types of Products, namely (i) our Product "Market Reports" and (ii) our Product "Full Access Global E-Commerce Reports".
 - 2.3 If a customer orders our Product "Market Reports", the customer gets access to the ordered report as identified in the Report Order Form and the customer may use that report in accordance with Section 4.3 below and the other provisions of the Contract.
 - 2.4 If a customer orders our Product "Full Access Global E-Commerce Reports", the customer gets access to any standard reports (for the avoidance of doubt excluding reports published in connection with any research services) focussed on the "Internet & E-Commerce" industry as generally published by us during the twelve (12) months prior to the execution of the Contract and during the subscription term as identified in the "Report Order Form" as of the date of the execution of the Contract (i.e. one, two or three years), and the customer may use those reports as a "Global Site License" in accordance with Section 4.3 below and the other provisions of the Contract.
 - 2.5 Unless expressly agreed otherwise in writing, the contents of our offers may not be made available in whole or in part to any third party outside the organization of the customer without our prior written consent.
 - 2.6 Our offers are not binding and subject to change without notice until acceptance by the customer. Our orders will become legally binding upon acceptance by the customer. A valid acceptance requires the execution of our "Research Order Form" or our "Report Order Form" respectively (each such document hereinafter the "Order Form") by a duly authorized representative of the customer and the submission of the Order Form to us via facsimile or email with pdf-attachment. We will provide the customer with the access data required to access the ordered Product(s) with two (2) days as of the execution of the Contract.
- 3. TERMS OF PAYMENT**
 - 3.1 The contractually negotiated prices are to be derived exclusively from the Order Form and/or the documents referenced therein.
 - 3.2 All prices are net and without transportation costs, if applicable. Value Added Tax, if applicable, at the statutory rate shall be added to all fees payable hereunder.
 - 3.3 We may demand an additional fee for services that go beyond the scope as agreed under the Order Form in case such additional Products are requested by the customer.
 - 3.4 We will send our invoice to the customer upon execution of the Contract, unless agreed otherwise in the Order Form. In the event that the customer orders our Product "Full Access Global E-Commerce Reports", we will send our invoice for the first contract year upon execution of the Contract and the invoice(s) for any subsequent contract year(s), if any, upon commencement of any subsequent contract year.
 - 3.5 All payments shall be due and payable within thirty (30) days following the date of our invoice without any deductions. The customer will be in default one day after the expiry date without any further warning notice being required.
 - 3.6 All customers' rights of retention or set-off are hereby excluded to the extent that they are not based on the same contractual relationship. Retentions or set-offs are allowed only if the customer's claim is undisputed or has become unappealable.
 - 3.7 In the event of a customer's default in payment or other apparent credit unworthiness, all remaining claims against that customer shall become immediately due and payable in full. We shall then be entitled to rescind payment terms previously agreed upon and to demand payment in advance or other appropriate security with respect to pending deliveries. A customer shall be deemed unworthy of credit in particular when he files a petition in bankruptcy or composition proceedings.
- 4. INTELLECTUAL PROPERTY RIGHTS AND INDEMNITIES**
 - 4.1 All copyrights and other intellectual property rights in connection with our Products remain with us. All data carriers remain our property. The customer may not modify, publish, transmit, transfer or sell, reproduce, create derivative works from, distribute, perform, display, or in any way exploit any of the Products made available by us, in whole or in part, except as expressly permitted under the Contract.
 - 4.2 Upon delivery of the Products to the customer and payment of the agreed fee, the customer obtains a non-exclusive, non-transferable, perpetual, worldwide right to use the Products provided to the customer for its internal purposes or any additional purposes set out in the Order Form. A right to resell our Products requires our prior written approval.
 - 4.3 In the event that the parties agree on a "Single User License" under the Order Form, this means that only one individually named user of an organization shall be entitled to access the report. In the event that the parties agree on a "Site License" under the Order Form, this means that all users within a given geographical location (as specified in the Order Form) of an organization shall be entitled to access the report. In the event that the parties agree on a "Global Site License", this means that all worldwide users of an organization shall be
- entitled to access the report. In both cases, the term "organization" refers to the company of the specific customer only and excludes any third parties including affiliates.
- 4.4 We must expressly be named as the author of any data the customer processes further as contractually negotiated.
- 5. TECHNICAL INFORMATION**
 - 5.1 We shall provide our Products in standardized data formats.
 - 5.2 The customer must ensure that he has the corresponding technical resources to make use of these data. The customer may not derive any claims in this connection on grounds of breach of obligation.
- 6. DEFECTS AS TO QUALITY**
 - 6.1 No claims for defects as to quality are triggered by insignificant discrepancies between our products and services and the warranted quality or fitness for use.
 - 6.2 Likewise, no claims for defects as to quality may be derived from entrepreneurial risks - e.g., with regard to questions of entrepreneurial discretion, an erroneous assessment of the market situation or the failure to recognize a business action's merit.
 - 6.3 Defect-based claims are further excluded in cases of excessive or improper use or in connection with damages caused by extraordinary conditions not reflected in the Order Form. This is also true in cases of subsequent changes made by the customers or third parties unless such changes do not affect the analysis and removal of a given defect.
 - 6.4 Claims for defects as to quality expire within one year from the commencement of the legal statute of limitation. This limitation does not apply to the extent that applicable law stipulates a longer period in cases of intentional or grossly negligent breaches of duty on the part of us, fraudulent concealment of a defect and injuries to life, body and health.
- 6.5 Claims for damages and the reimbursement of expenditures are further subject to Section 8.
- 7. LEGAL DEFECTS**
 - 7.1 We are liable for products and services infringing on third-party rights only if and to the extent that our products and services are used in accordance with the agreed contractual requirements.
 - 7.2 Unless agreed otherwise, our liability for the infringement on third-party rights is limited to the territory of the European Union and the European Economic Area as well as the place of its services' proper use as agreed under the applicable Order.
 - 7.3 In the event that a third party asserts claims against the customer, alleging that a service performed by us violates its rights, the customer shall promptly notify us. If a service rendered by us violates third-party rights, we shall choose one of the below actions, duly taking into consideration the customer's interests:
 - a) procuring for the customer the right to use the service;
 - b) revising the service to render it free of legal violations; or
 - c) withdrawing the service and refunding to the customer any related compensation paid, as adjusted by an adequate user fee, if we cannot effect another remedy at a reasonable expense.
 - 7.4 Upon our request, the Customer shall assist us with the defense against claims according to this section 7, with us reimbursing the Customer for any expenditures and costs incurred as a result, although each of the Parties bears the costs of the use of its own personnel.
 - 7.5 Claims the Customer may hold for legal defects expire in accordance with Section 6.4.
 - 7.6 Claims for damages and the reimbursement of expenditures are further subject to Section 8.
- 8. LIABILITY**
 - 8.1 In cases of intentional misconduct and gross negligence, we are fully liable pursuant to applicable law.
 - 8.2 Our liability in cases of simple negligence is limited as follows: we are liable only if and to the extent that we violated a material contractual obligation (cardinal obligation) - i.e., an obligation that (i) the Customer reasonably relied upon at execution of the applicable Order Form and (ii) was of critical significance to the outcome of performance. As regards property damage and financial loss, such liability is limited to typical and foreseeable damages; in no event will we be liable for any incidental, special, punitive or consequential damages, loss of profits or loss of data in such case.
 - 8.3 Our liability for damages under warranties (Beschaffenheitsgarantien) is limited to instances in which the warranty expressly includes such liability.
 - 8.4 Claims for the reimbursement of expenditures and other liability claims asserted by the Customer against us are subject to sections 8.1 through 8.3.
- 9. CONFIDENTIALITY**
 - 9.1 The Parties shall hold in strict confidence for an indefinite period of time all data and information materials of which they gain knowledge as part of a Contract, be it orally, in writing or otherwise, directly or indirectly, provided that such data or information materials are designated confidential or must be considered confidential based on their nature, and shall use them exclusively as part of the services covered by the relevant Order. This duty of confidentiality excludes data and information materials that:
 - a) were already known or accessible to any third party at the time of disclosure;
 - b) one of the parties legitimately receives from a third party following disclosure, and such third party is not bound by a duty of confidentiality in relations with the other Party;
 - c) must be disclosed by order of and to a government agency or another competent third party; and
 - d) must be disclosed to legal or tax advisors of the contractual customer in question for consulting purposes.
 In the cases of Sections c) and d), the parties shall (i) promptly inform each other about a given request and prior to disclosing confidential information, and (ii) limit the disclosure of confidential information to the minimum required.
 - 9.2 We may use the Customer as a reference so long as no contractual details are divulged.
- 10. JURISDICTION, GOVERNING LAW, MISCELLANEOUS**
 - 10.1 Place of payment is Hamburg, Germany.
 - 10.2 All disputes arising from or in connection with any Contract between the parties shall be resolved through the courts of Hamburg. Governing law is German law.