GLOBAL M-COMMERCE 2014
Smartphones & Tablets
Publication Date: March 2014

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- 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.
Global M-Commerce 2014: Smartphones & Tablets

General Information

Product Details

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Prices

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Key Findings (1 of 2)

M-Commerce increasing rapidly worldwide

Smartphones currently have higher penetration on global population than tablets, but tablet use is growing at a faster rate. Mobile retail applications are more popular on smartphones, while in access via tablets mobile browsing is prevalent. Tablets are a more suitable device for making large purchases on mobile. Smartphones, on the other hand are perfect for making on the go and quick purchases.

There are other peculiarities in mobile shopping, for example, app vs browser. Neither app nor mobile browser had a distinct advantage over the other in terms of frequency for mobile shopping in 2013. They are both equally important for mobile shopping, though in different ways. While browsers score higher over apps in terms of convenience, apps are better evaluated by consumers with regard to speed. Apps also capture different customer segments than browsers.

On both mobile platforms, the sale of digital goods, tickets, and bill payments make up the largest share of M-Commerce, but sales of physical goods such as clothing are rising fast. A new development, coming from Asia and spreading globally is the emerging power of messaging apps in M-Commerce.

Variety of major players in mobile shopping worldwide

Globally, E-Commerce merchants and traditional retailers are trying to capture the booming M-Commerce market. In the USA, mobile apps of Amazon and eBay are popular, while retailers such as Walmart, Marcy’s and Home Depot report increasing traffic to the mobile versions of their websites. In Latin America, an E-Commerce merchant MercadoLibre saw its M-Commerce sales through its mobile website and app grow throughout 2013 reaching over 10% by the end of the year. The Otto Group, Germany-based multi-channel mass merchant, adopted a new mobile initiative in early 2014, with the aim of generating 50% of online traffic to all its brands through mobile devices, while the German online clothing retailer Zalando began an upgrade of its mobile application for use in international markets. UK-based fashion online retailer ASOS generated almost a third of its website traffic from mobile devices.
M-Commerce increasing rapidly worldwide

In Russia, online retailers such as Ozon.ru see growing traffic from mobile, while online clothing retailers such as Lamoda and KupiVIP have launched mobile applications. Japan’s E-Commerce giant Rakuten has seen mobile traffic to its website increase and has acquired a mobile messaging service. Meanwhile, South Korean online merchant Gmarket launched a new mobile shopping concept: a virtual store which combines online and offline shopping with mobile devices.

Regional leaders in M-Commerce

In North America, one of the most advanced regions in terms of M-Commerce, the US market generates several tens of billion EUR of mobile retail sales, with its share on total online retail reaching over 15%. M-Commerce sales are sensitive to seasonal variation, with Q4 being especially lucrative on Cyber Monday and Black Friday, when the share of M-Commerce is even higher than throughout the year. In Latin America, consumers are starting to embrace mobile shopping, as mobile penetration grows and retailers launch mobile apps. The population most engaged in mobile shopping in Latin America is Mexico which also has the highest smartphone penetration on total population. Brazil, the region’s largest market ranks next by mobile shopper penetration. In Argentina, the share of M-Commerce on total online retail sales does not exceed several percentage points, which is, however, more than in many other Latin American countries.

In Central Europe, Switzerland leads in penetration of smartphone/tablet owners who shop on mobile at least once a week, followed by Germany. M-Commerce sales in Germany reached over 10% of the total online retail sales in 2013. In Western Europe, UK leads by share of mobile retail on total B2C E-Commerce sales, with sales from tablets growing faster than sales from smartphones. In France, over a quarter of online shoppers planned to purchase from mobile in 2014, while in the Netherlands over 2 million people already engage in mobile shopping. In Eastern Europe, mobile shopping is developing in Russia as a growing share of the 143 million population obtains access to the mobile Internet. Around a third of mobile Internet users in Russia purchase products from online shops via their devices. In Turkey, where mobile Internet already accounts for the largest share of Internet subscriptions, a significant double-digit share of smartphone owners shops via mobile.

In Asia-Pacific, South Korea sets the newest trends for global M-Commerce, such as integration of mobile shopping into messaging platforms. In Japan, a high double-digit share of mobile users shops via their devices. The number of mobile Internet users in China topped half a billion in 2013, with over a hundred million of them engaging in M-Commerce.

In the Middle East & Africa, M-Commerce has a high potential, as most of the Internet users access the web through their mobile phones. Both in South Africa and in the UAE the share of Internet users shopping though mobile phones already reached a high one-digit number.
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Though tablets had a higher penetration on online shoppers in 2013, smartphones were almost equal to them in frequency of purchase.

**Global:** Breakdown of Frequency of Mobile Purchase, in % of Online Shoppers, by Tablet and Mobile Phone or Smartphone, 2013

Survey based on a survey of 15,000 online shoppers in 15 territories; question asked: "How often do you buy products using the following shopping channels?" Source: to be disclosed in the original report.

In Argentina, M-Commerce accounted for X% of the total B2C E-Comm. sales in 2013, reaching around ARS XXX mil. (EUR XXX mil.) in value.

**Argentina:** Breakdown of B2C E-Commerce Sales, by M-Commerce and Other, in %, 2013

Definition: includes mobile phones and tablets
Source: to be disclosed in the original report.
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.
- Besides providing information on the specific topic, every chart contains an Action Title, which summarizes the main statement of the chart and a Sub Title, 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 Global M-Commerce report:

- This report covers the global M-Commerce market.
- It contains a Management Summary, summarizing the main information provided in each chapter.
- The second chapter of this report covers global development, including market trends, sales and information about mobile shoppers.
- In the following chapters provide information on M-Commerce in the regions.
- Regional development is presented first, where available. The top country or countries in terms of M-Commerce sales are presented next, with a market overview provided on the first chart, including trends and news about players, and the consequent charts presenting information about sales, shares, mobile shoppers and products, where available. For emerging top countries also information on mobile Internet penetration and mobile device ownership was included. The scope of the presented data for each country varies by data availability.
- Further countries are presented in an alphabetical order, with mobile shopping development illustrated by such data as mobile Internet penetration and users, mobile Internet activities, mobile shopper penetration and purchased product categories.
# Frequently Asked Questions

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<tr>
<td><strong>What is the target audience for the market reports?</strong></td>
<td>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.</td>
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<td><strong>What type of analysts are writing the market reports?</strong></td>
<td>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.</td>
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<td><strong>Is the information in the market reports comparable from country to country?</strong></td>
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Global M-Commerce 2014: Smartphones & Tablets

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.”

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

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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
Report Order Form

PLACE YOUR ORDER OFFLINE

Email: order@ystats.com
Fax: +49 40 39 90 68 51

PLACE YOUR ORDER ONLINE

All our reports are also available for purchase online in our Online Shop.

CHOOSE YOUR REPORT(S) AND LICENSE* TYPE(S)

Please confirm the license type and reports:

<table>
<thead>
<tr>
<th>Report Title</th>
<th>Publication Date</th>
<th>Price (€)</th>
<th>SINGLE USER LICENSE</th>
<th>SITE LICENSE</th>
<th>GLOBAL SITE LICENSE</th>
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TOTAL

CHOOSE YOUR PAYMENT METHOD

Choose Your Preferred Payment Method:

- Credit Card
- VISA
- MasterCard
- China UnionPay
- Bank Transfer (offline orders only)
- PayPal

Bank Transfer information will be provided to you in the invoice you receive following submission of an Order Form offline.

An invoice will be sent via e-mail to the e-mail address as listed in the contact details below. Payment via PayPal will be made available upon receipt of the invoice.

COMPLETE YOUR CONTACT DETAILS

An Invoice will be sent to your company

<table>
<thead>
<tr>
<th>TITLE</th>
<th>FIRST NAME, LAST NAME</th>
<th>JOB TITLE</th>
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<td>STATE/PROVINCE</td>
<td>COUNTRY</td>
<td>POSTAL CODE</td>
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</tbody>
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HOW DID YOU FIND US?

- Search Engine (Google, Bing etc.)
- Print/Online Publication
- Press Release
- Facebook/Twitter
- LinkedIn/XING
- Personal Recommendation
- Others

SIGNATURE

EU COMPANIES MUST SUPPLY VAT NO.

PURCHASE ORDER NO. (IF REQUIRED)

ORDER DATE

All orders are subject to the Terms & Conditions contained on our website. All reports are provided in PDF and PowerPoint formats. yStats.com may contact you in the future about receiving our free newsletter or other mailing. If you do not wish to be contacted, please advise us accordingly. Your contact information will not be sold or shared with other organizations.

* Please be advised that when purchasing a report, you have the option to choose between a Single User License (allowing one single user access to the report), a Site License (allowing up to 10 users in a particular geographic location access to the report), or a Global Site License (allowing up to 10 users of a company worldwide to access the report). Please choose the license that suits your needs best. Failure to comply with our Terms and Conditions with respect to appropriate license usage may result in legal action.
Global M-Commerce 2014: Smartphones & Tablets

TERMS AND CONDITIONS

yStats.com GmbH & Co. KG provides its services exclusively to contracting partners and users of its website according to the following Terms and Conditions, by visiting our website, shopping at the online store provided by yStats.com, or placing an order offline for any of our products, you are deemed to have agreed to the following Terms and Conditions, which are, unless explicitly agreed upon otherwise in writing, the entirety of the "Contract", as defined in I.2 of the Terms and Conditions. yStats.com GmbH & Co. KG and you. Terms and Conditions are subject to change at any time without prior notice, based on the discretion of yStats.com GmbH & Co. KG, the most current of which are readily available on our website.

We herewith contract any terms and conditions of purchase by our customers which will not become part of the Contract.

1. SCOPE

1.1 The following terms and conditions apply to our entire contract (the "Contract") between yStats.com GmbH & Co. KG, hereinafter referred to as "Company", or any entity or individual acting on behalf of the Company and you, the customer, hereinafter referred to as "Customer". All conditions already existing in the course of the purchase of our reports both on- and offline, (ii) custom research services, (iii) full access subscriptions, and (iv) any order contracts between the parties executed with reference to these terms and conditions or reports and other services and products which we may make available to the customer under a Contract hereafter the "Order".

1.2 Agreements contrary to these terms and conditions require our express written confirmation. Deviations between these terms and conditions and the contents of the Order will be accepted if and only if expressly confirmed in writing by the Company, and is not binding, limited to the case of custom research orders, at which point the contents of the Order shall prevail.

2. REPORT AND FULL-ACCESS SUBSCRIPTION OFFERS & ORDERS

2.1 With the purchase of our Market Reports, you can purchase more either online or offline.

2.2 Our homepage contains information about pricing, acceptable payment methods and product brochures. To order a report, please fill the Order Form or email us.

2.3 We will begin processing your order immediately, subject to availability. We will notify you of the same or return any requests that cannot be filled due to unforeseen circumstances.

2.4 If you order our "Market Reports", you gain access to the ordered report as identified in the Report Order Form and you may use that report in accordance with Section 5.3 below and the other provisions of these terms and conditions.

2.5 To purchase one of our Full-Access Subscriptions, please contact us through the appropriate forum on our website, located under the Full-Access tab or our homepage. Once we receive your inquiry, we will forward an Order Form with pricing, billing and payment options. Once this Order Form has been completed and signed, please send the Order Form via facsimile or email with PDF-attachment. Upon receipt of the completed Order Form, we will send an invoice detailing the price of the "Full-Access Subscription" and payment method options. Upon successful processing of payment, access and login details will be forwarded to the customer within two (2) business days.

2.6 You will order one of our "Full Access Subscriptions", you gain access to all of our Market Reports within the scope of the subscription contract. Your Custom Orders are excluded from these terms and conditions or reports and other services and products which we may make available to the customer under a Contract hereafter the "Order".

3. CUSTOM RESEARCH OFFERS & ORDERS

3.1 It is the Company’s routine practice, when writing, the contents of our offers may not be made available in whole or in part to any third party outside your organization.

3.2 With respect to research services, upon inquiry, we submit an offer to you in the form of a "Research Order Form". The offer is binding upon the customer only at the time the offer is accepted in writing.

3.4 We will send our invoice to you upon execution of the Contract, unless agreed otherwise in the Order Form. In the event that you order our product "Full Access Subscription", we will send our invoice for each report for the first contract year upon execution of the Order. (Any invoice(s) for any subsequent contract years), will be sent to you upon commencement of each contract year.

5. INTELLECTUAL PROPERTY RIGHTS AND INDEMNITIES

5.1 All copyrights and other intellectual property rights in connection with our products and all contents of our website are the property of the Company and are protected by both domestic and international laws and treaties, including trademark, copyright, database right laws, and any other intellectual property rights. You may not copy, reproduce, publish, transmit, transfer, sell, resell, distribute, or make derivative works of, 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 applicable law. The Company reserves all rights not expressly granted in this Agreement.

5.2 We, as well as any original sources contained within our product, must be expressly named as the author of any data the customer processes further as consensually negotiated.

5.3 Upon delivery of the product(s) to you and payment of the agreed fee, you obtain a non-exclusive, non-transferable, non-sublicensable, and non-assignable license to use the products for internal purposes or any additional purposes set out in the Order Form.

5.4 The products may only be used under a "Single User License" under the Order Form, that means that only (1) individual named user of an organization shall be entitled to access the report(s). In the event that the parties agree on a "Site License" under the Order Form, this means that up to (50) 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 up to (100) worldwide users of an organization shall be entitled to access the report. In both cases, the term "organization" refers to your specific company only and excludes any third parties, including affiliates.

6. TECHNICAL INFORMATION

6.1 We reserve the right to modify the products in the following standardized data formats: PowerPoint and PDF. For custom research reports, Excel documents may also be provided, upon request.

6.2 You must ensure that you have the corresponding technical resources to make use of these data. You may not derive any claims in this connection on grounds of breach of obligation.

6.3 Upon successful processing of payment, purchases made via the online shop will be immediately available to download. For all offline purchases, upon successful processing of payment, you will receive the requested products and services in the aforementioned standardized data formats, and all additional data containing the relevant information of the second (2) business days.

7. DEFECTS AS TO QUALITY

7.1 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.

7.2 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 consider the relevant product features.

7.3 Detect-based claims are further excluded in cases of excessive or improper use or in connection with a lack of care in the use of the products or in cases of systems or programs not recommended for use.

7.4 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 basically negligent breach of duty and of an obvious defect and injuries to life, body and health.

7.5 Claims for damages and the reimbursement of expenditures are further subject to Section 9.9.

8. LEGAL DEFECTS

8.1 We are liable for products and services infringing on third party rights only if and to the extent that such infringement is definitely ascertainable at the time of the delivery.

8.2 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 defined in Section 6, 8, 9, and 10 of these terms and conditions.

8.3 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 or b) revoking the service to render it.

8.4 Upon our request, the Customer shall assist us with the defense against third party claims according to Section 8, with each of the Parties bearing the costs of its own personnel and counsel.

8.5 Claims the Customer may hold for legal defects expire in accordance with Section 7.4.

8.6 Claims for damages and the reimbursement of expenditures are further subject to Section 9.9.

9. LIABILITY

9.1 In cases of intentional misconduct and gross negligence, we are liable to the full extent permissible under applicable law.

9.2 We are liable for any damages, especially but not limited to any incidental, special, punitive or consequential damages, loss of profits or loss of data. This limitation does not apply to any claims for damages due to damage to life, body or health.

9.3 In case of a negligent breach of a material contractual obligation our liability for damages — except for damage to life, body or health — is limited to typical and at the time of the formation of this Contract foreseeable damage.

9.4 The aforementioned limitations do also apply to our liability for fault by our bodies, employees and vicarious agents as well as our bodies, employer and vicarious agent personal liability.

9.5 Our liability for damages under warranties (Beschaffenheitsgarantien) is limited to instances in which we, 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 Contract. 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) which is lawfully disclosed to you by a third party that is not subject to a confidentiality obligation regarding this data or information; 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, or to financial institutions to obtain financing on terms which are subject to a confidentiality obligation and in order to disclose confidential information, and (ii) limit the disclosure of confidential information to the minimum required.

9.6 We may use your company name and logo as a reference for so long as no contractual details are disclosed.

10. CONFIDENTIALITY

10.1 The Parties shall hold in strict confidence for a period of 10 years of the formation of this Contract regarding 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 Contract. This duty of confidentiality excludes data and information materials that:

11. JURISDICTION, GOVERNING LAW, MISCELLANEOUS

11.1 In Contracts with merchants, legal persons under public law, or special assets (Sondervermögen) under Civil Code § 265 (Gesellschaftsverträge) and with the exception of payment, these terms and conditions are governed by German law.

11.2 In Contracts with merchants, legal persons under public law, or special assets (Sondervermögen) under Civil Code § 265 (Gesellschaftsverträge) and with the exception of payment, these terms and conditions are governed by German law.