

iab.

on device
research

A Global Perspective of Mobile Commerce

September 2016



Top 6 Mobile Commerce Takeaways



- 1) Mobile commerce is a global phenomenon and is becoming habitual for mobile purchasers.
- 2) Mobile commerce is primarily driven by convenience and value. Overall consumer satisfaction and future purchase momentum are high!
- 3) The key concerns about security, privacy, and purchase experience need to be addressed to facilitate the continued growth of mobile commerce.
- 4) Mobile commerce is part of a multichannel purchase experience. From 'showrooming' to 'webrooming', mobile devices serve not only as a direct purchase channel, but also aid consumers' purchase journey across other channels, online and offline.
- 5) Mobile ads and social media play an important role in mobile commerce to trigger purchase interest, aid product discovery, and cultivate word of mouth.
- 6) Mobile wallet adoption is currently modest in the overall payment mix; however it exhibits potential to foster further growth of mobile commerce.

Contents

- Objectives, Methodology and Sample
- Section 1: The Mobile Commerce Landscape
- Section 2: Motivations and Satisfaction of Mobile Commerce
- Section 3: Purchase Behaviour on Mobile
- Section 4: The Influence of Mobile Ads and Social Media
- Section 5: A closer look at Mobile Wallet Usage

Objectives,
Methodology and
Sample.

Objectives

With the ubiquity of mobile devices and mobile Internet around the globe, purchasing products and services on mobile devices has become increasingly common.

*This research in support of the IAB Global Research Initiative aims to **explore** and **understand** the **similarities and differences in consumer purchase** and **payment activities** that take place on mobile devices across 19 countries that participated in the study.*

This research will support the IAB's continued thought leadership efforts around global mobile trends.

It will also provide participating organizations exciting and insightful perspectives of their own mobile consumers, enable them to share insights with their members, providing a tangible benefit from membership.



Participating Countries



Research Methodology

Method:

- 22 question survey was designed and fielded in 19 markets.
- All respondents were asked the same questions: Items purchased, frequency of purchase, where purchased and how much was spent.

Sample Target:

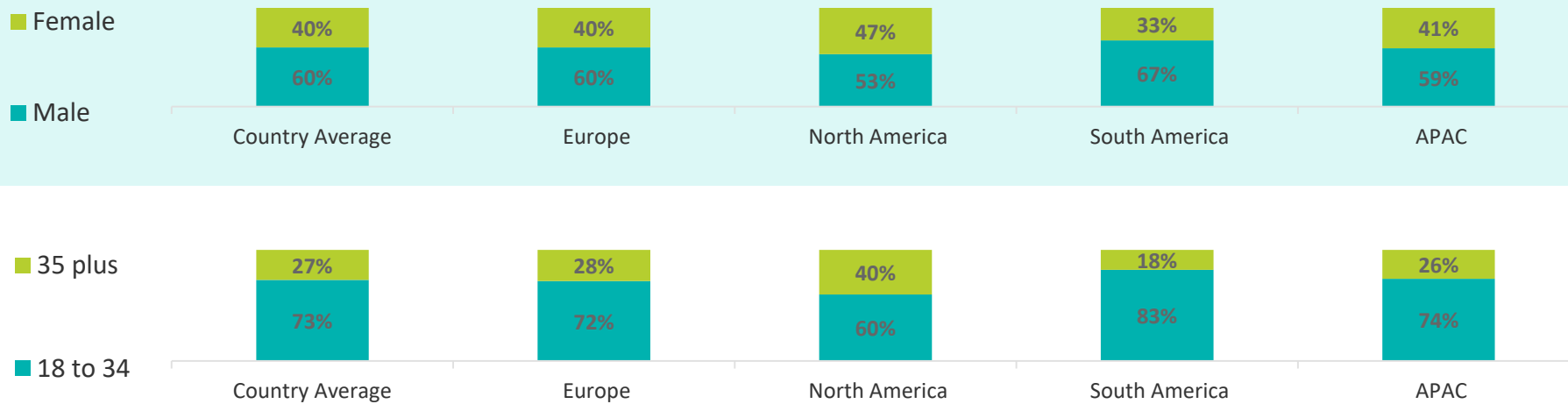
- N=200 per market, who are 18 plus, conduct online activities on mobile (smartphone or tablet) and have purchased a product or service on mobile in the past 6 months.
- All respondents completed the survey on smartphone or tablet.

Fieldwork Period:

From – 22nd July 2016
To – 17th August 2016

Note:

The report shows “Country Average” to represent average results across all 19 participating countries.



Base: Mobile purchasers in all participating countries (N=3800), per market (N=200)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval



Section 1: Mobile Commerce Landscape



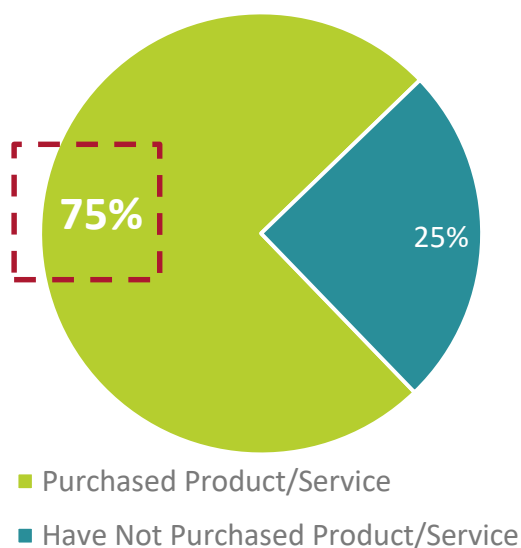
Headline: Mobile commerce is a global phenomenon and has gained a strong hold!

- **Across 19 participating countries in this study, the behavior of purchasing products or services on mobile devices is prevalent.**
 - On average, 75% of mobile Internet users have purchased a product or service via their smartphone/tablet in the past 6 months.
- **Mobile purchasers report to have nearly one-third of total monthly purchases bought and paid by their mobile device.**
 - In a typical month, mobile purchases and payments account for 31% of total monthly purchases, whether that be purchasing directly via their mobile device or by paying in store using their mobile.
- **Mobile purchases are becoming habitual - nearly a quarter purchase products and services via their smartphone/tablet weekly.**
 - APAC is taking the lead of frequent mobile purchases.
- **The market is still poised for growth!**
 - While there is a core contingent of mature mobile shoppers – 57% having made mobile purchases for over a year, 43% have recently adopted mobile commerce (made their 1st purchase within the last year).
 - Austria, Peru and Colombia boast most new adopters of mobile commerce.

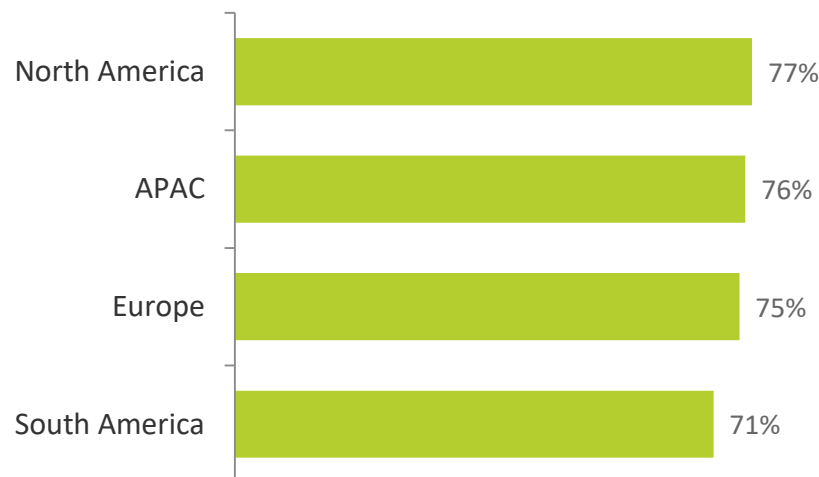
On average 75% of mobile Internet users have made a purchase on their smartphone or tablet in the past six months.

Q6. Which of the following products or services, if any, have you purchased via your smartphone or tablet in the past 6 months? Select all that apply.

**All Participating Countries'
Average**



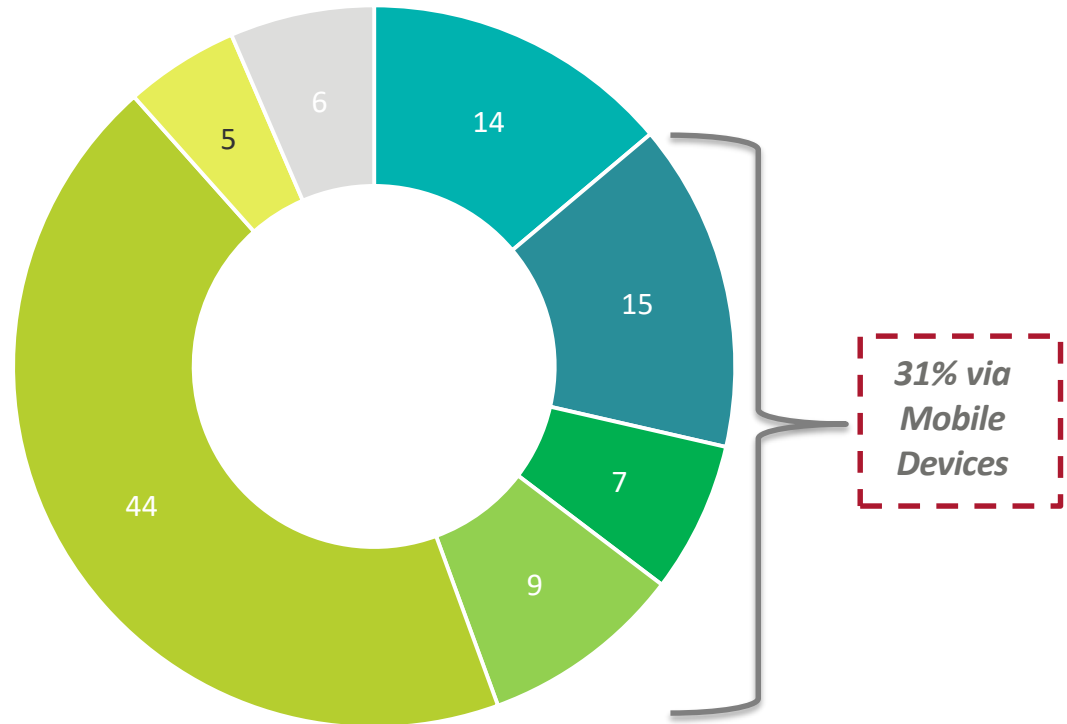
Regional Overview



Mobile purchases and payments account for nearly one-third of total monthly purchases.

Q12. Thinking about your typical monthly purchases. Approximately what percentage of your purchases are made via the following channels?

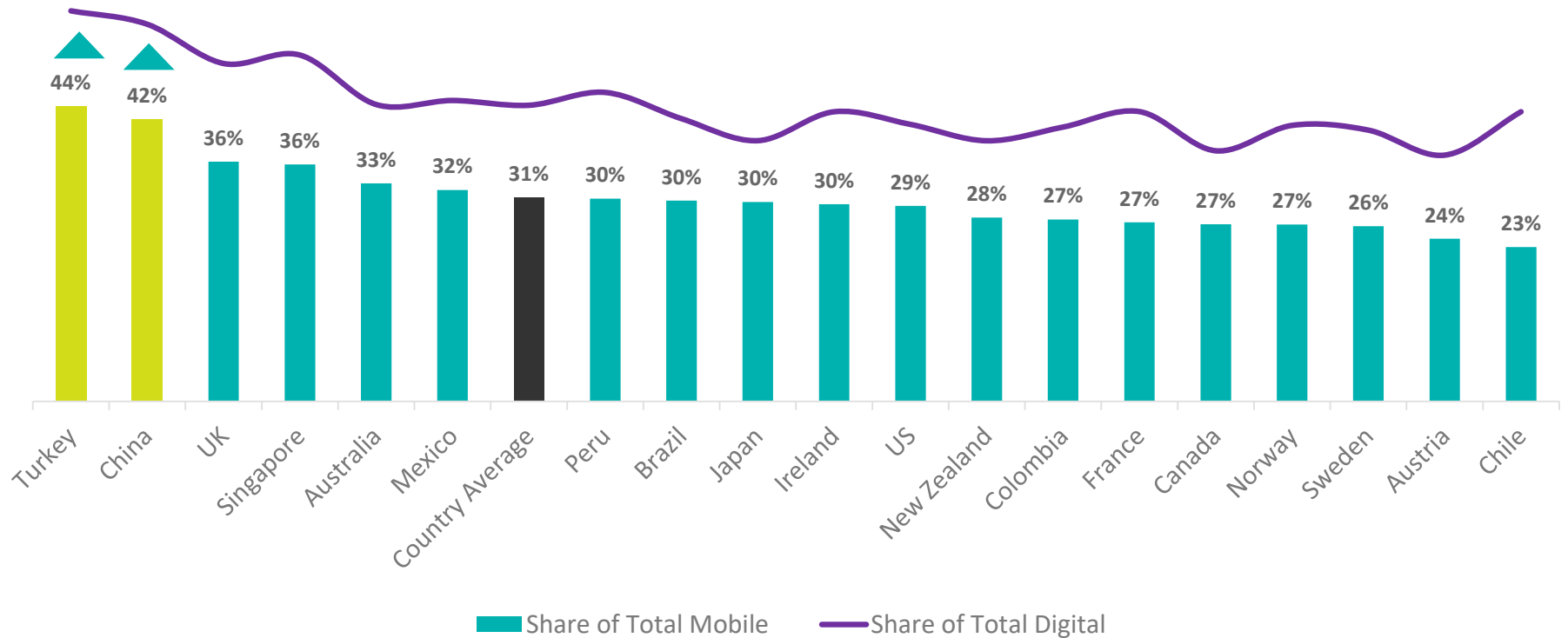
- Online - Via your desktop/pc/laptop
- Online - Via your smartphone
- Online - Via your tablet
- In store purchase, paid with mobile
- In store purchase, paid with cash, credit/debit card, but not mobile
- Over the phone via a voice call
- Other



Turkey and China are currently the leading markets in terms of share of mobile purchases.

Q12. Thinking about your typical monthly purchases. Approximately what percentage of your purchases are made via the following channels?

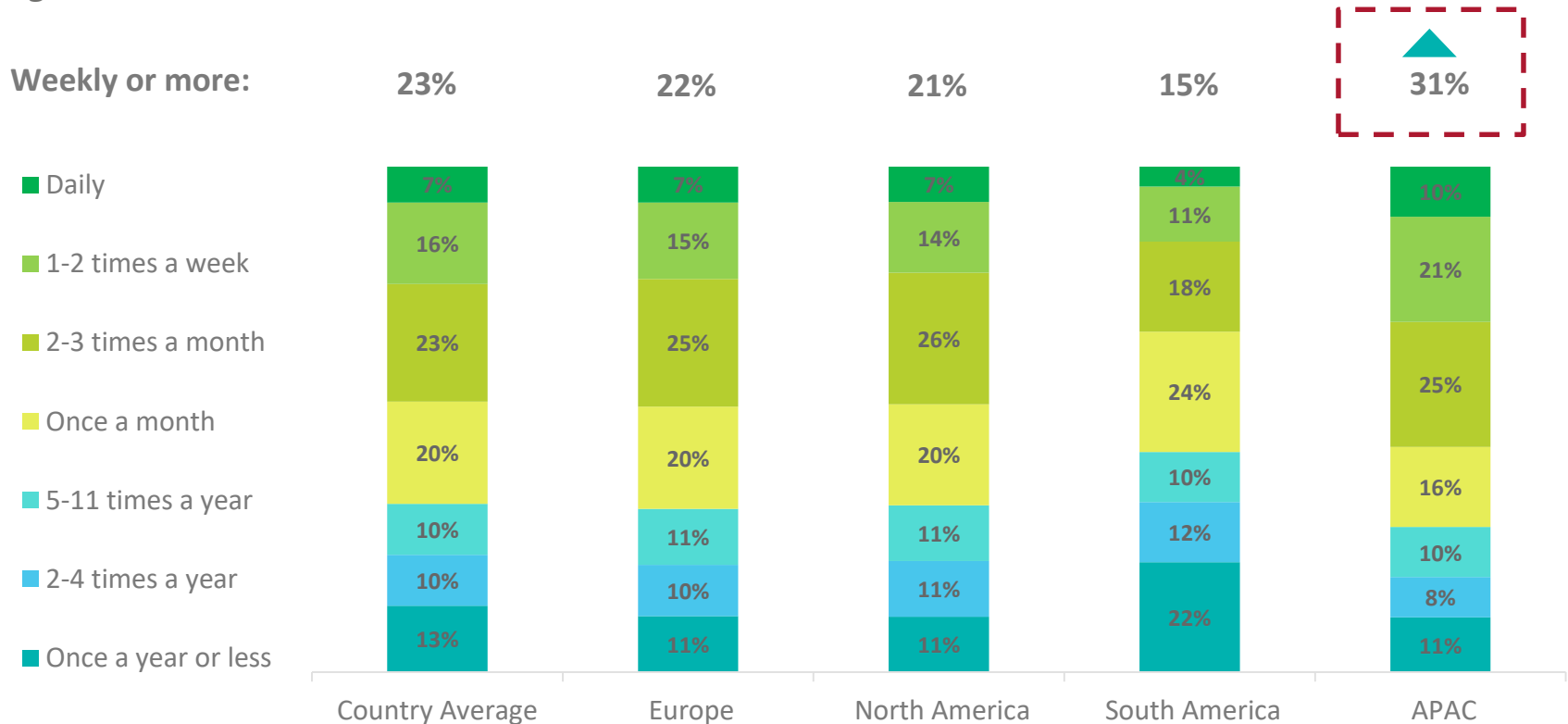
Share of Total Monthly Purchases by Country



Nearly a quarter purchase weekly via their mobile device. In APAC markets, frequency of mobile purchase is significantly higher.

Q8. How frequently do you purchase products or services via your smartphone or tablet?

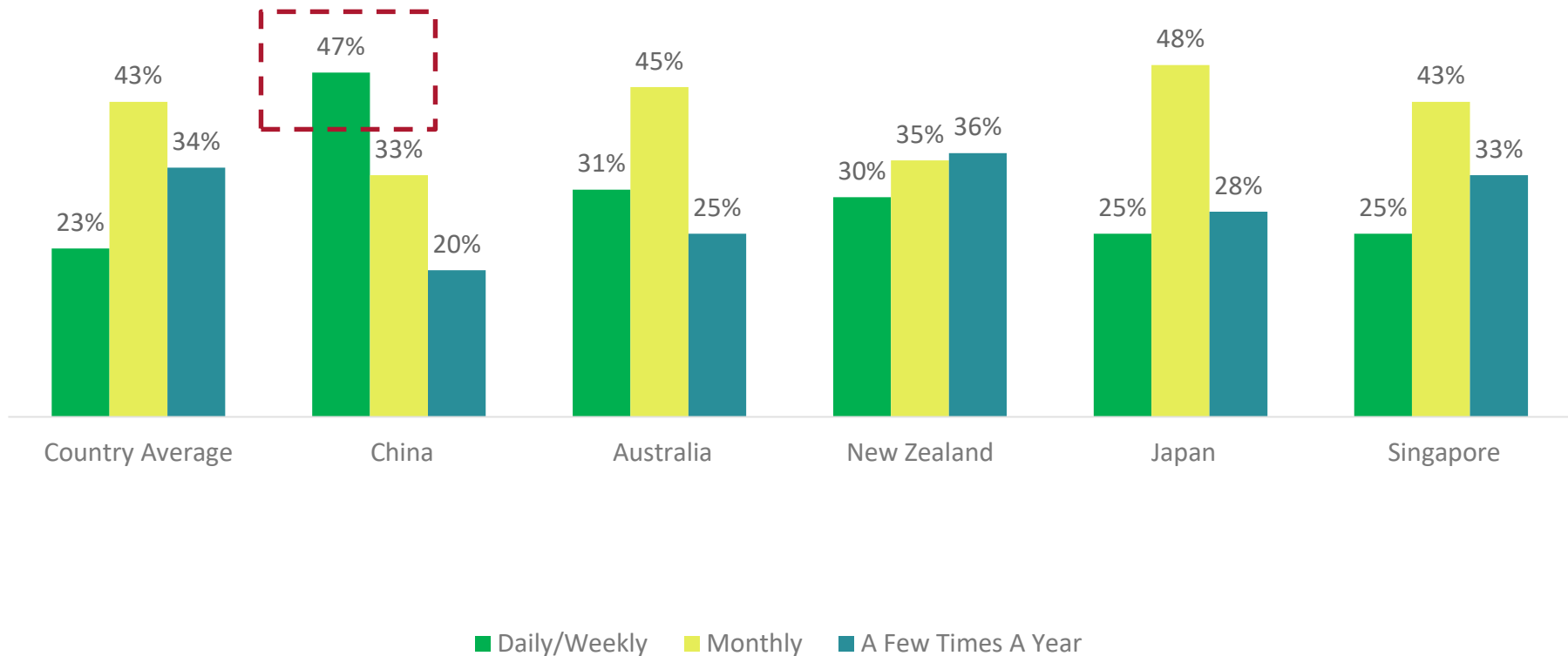
Regional Breakdown



China & Australia see the highest frequency of purchase in APAC - 47% and 31% respectively doing so weekly+.

Q8. How frequently do you purchase products or services via your smartphone or tablet?

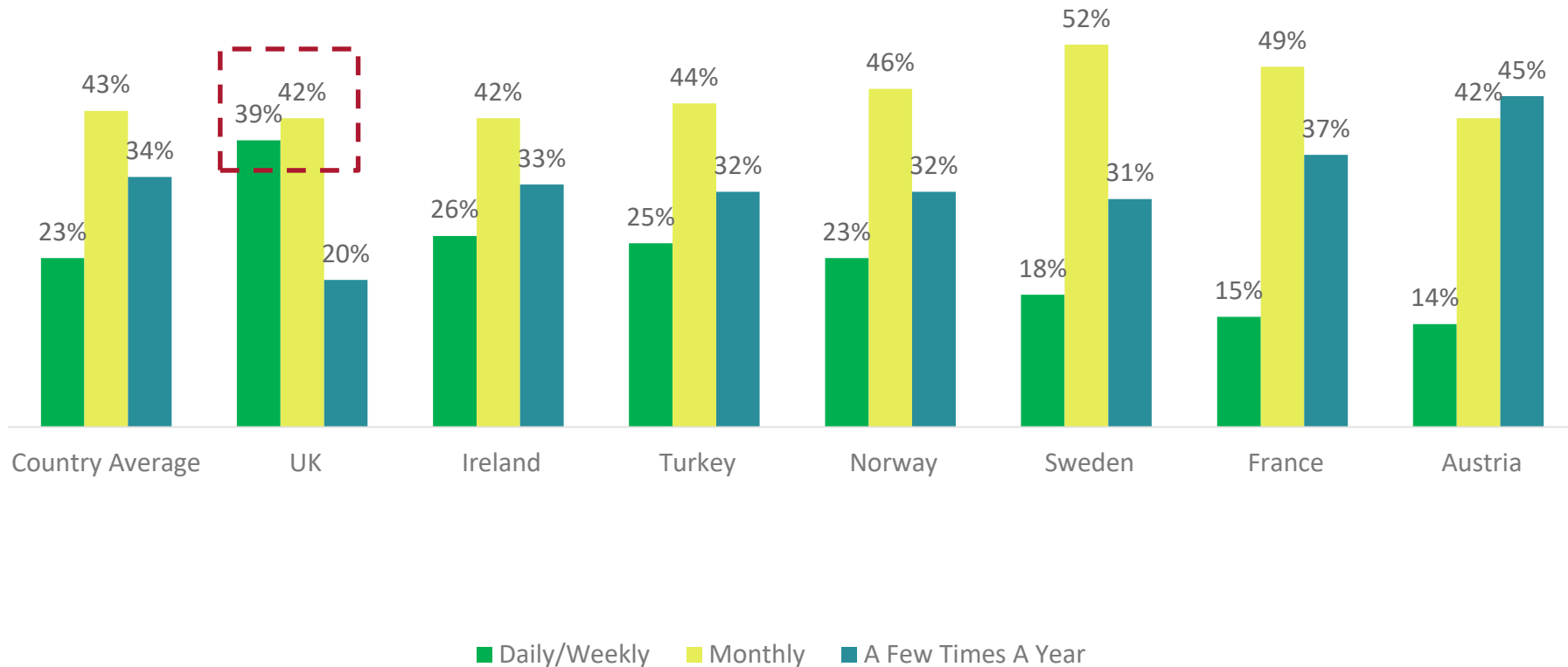
Regional Breakdown - APAC



Across the European markets, purchasing frequency is more monthly in cadence with the exception of the UK, where 39% purchase weekly.

Q8. How frequently do you purchase products or services via your smartphone or tablet?

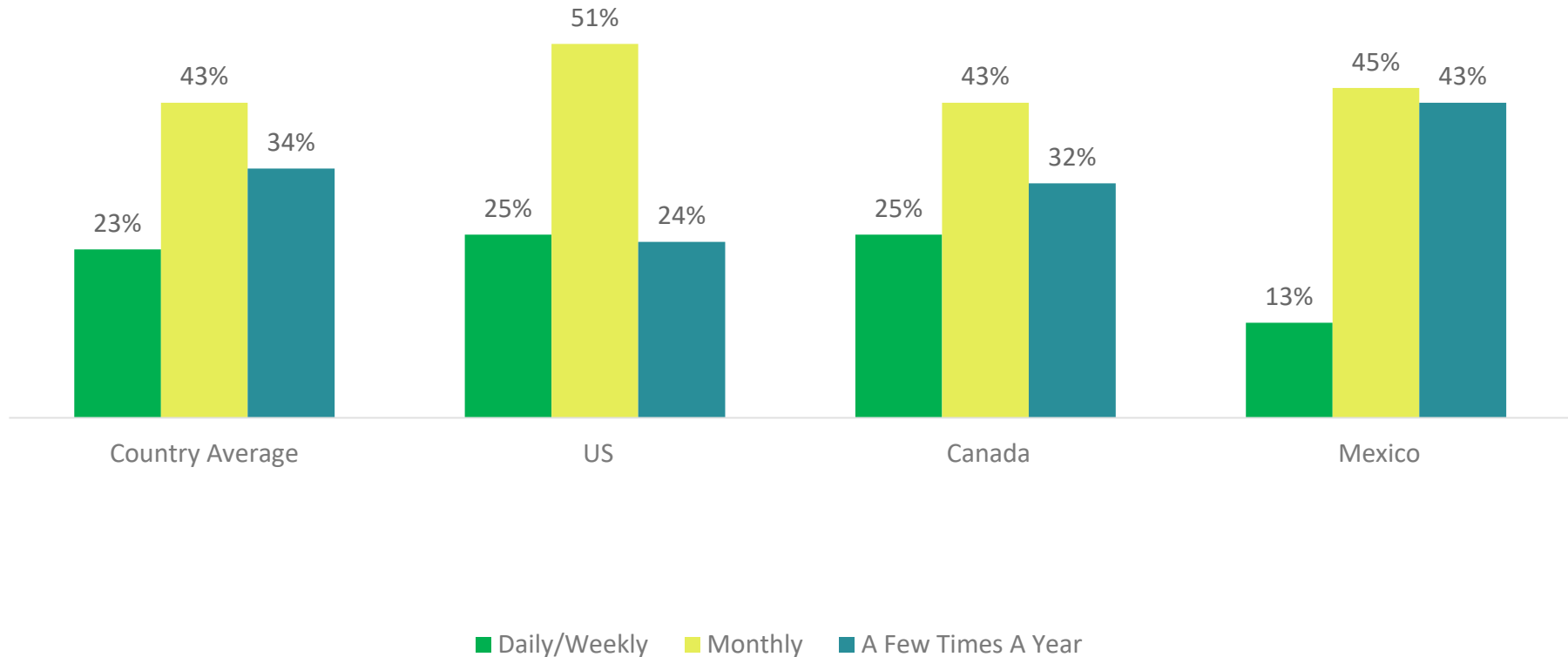
Regional Breakdown - EUROPE



The North American markets follow a similar pattern to those in Europe, primarily on a monthly basis.

Q8. How frequently do you purchase products or services via your smartphone or tablet?

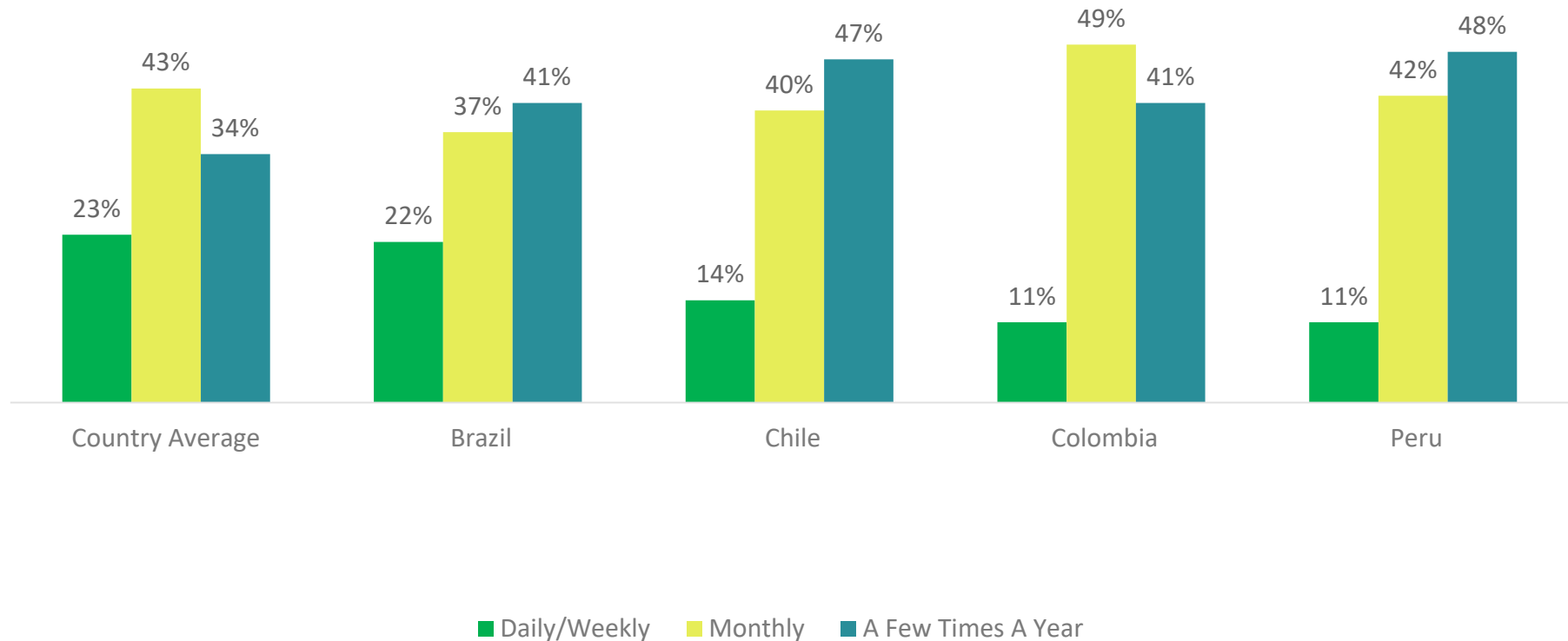
Regional Breakdown – North America



In South America, Brazil leads in mobile purchase frequency.

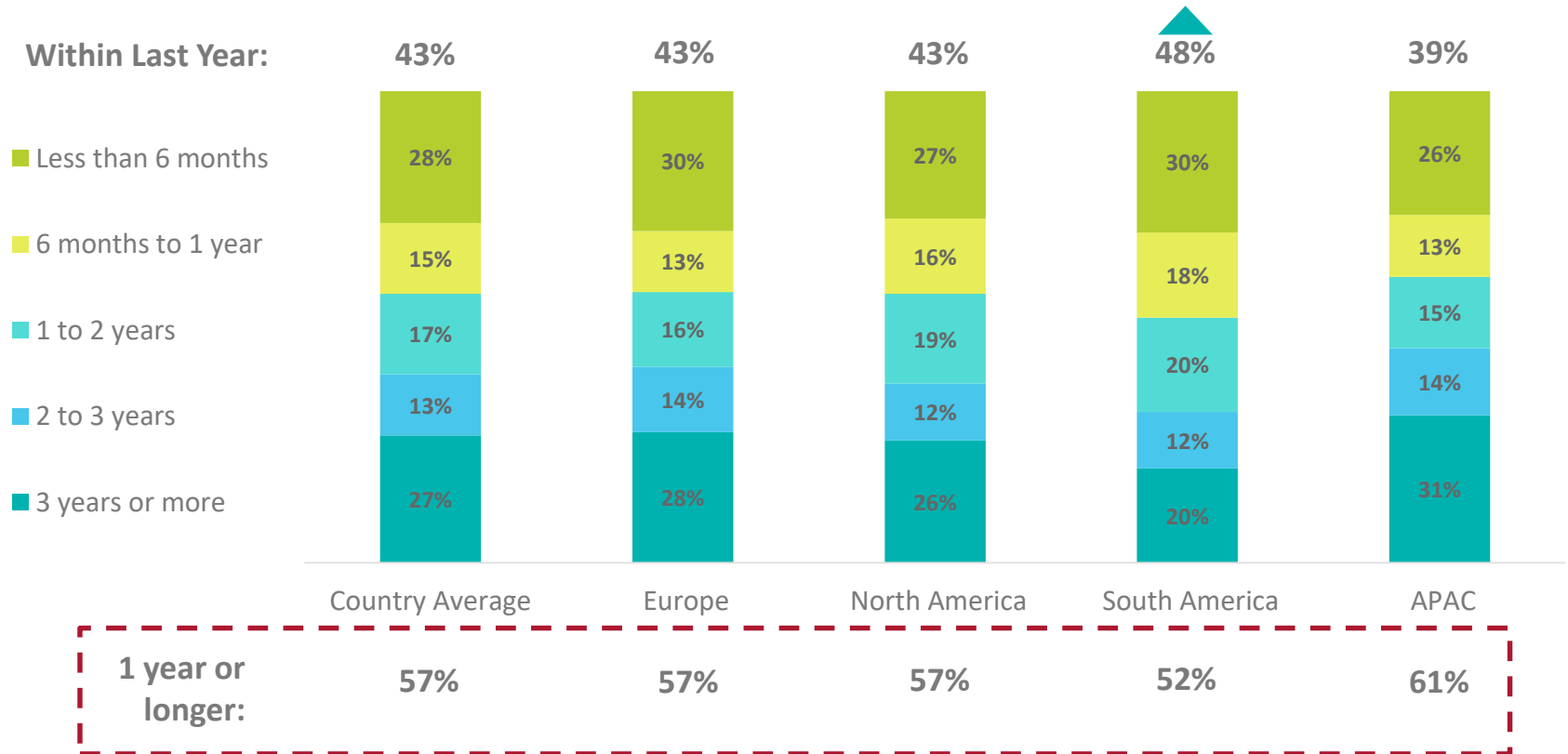
Q8. How frequently do you purchase products or services via your smartphone or tablet?

Regional Breakdown – South America



57% have been purchasing on mobile for over a year. Pleasingly, new adopters are still entering the market.

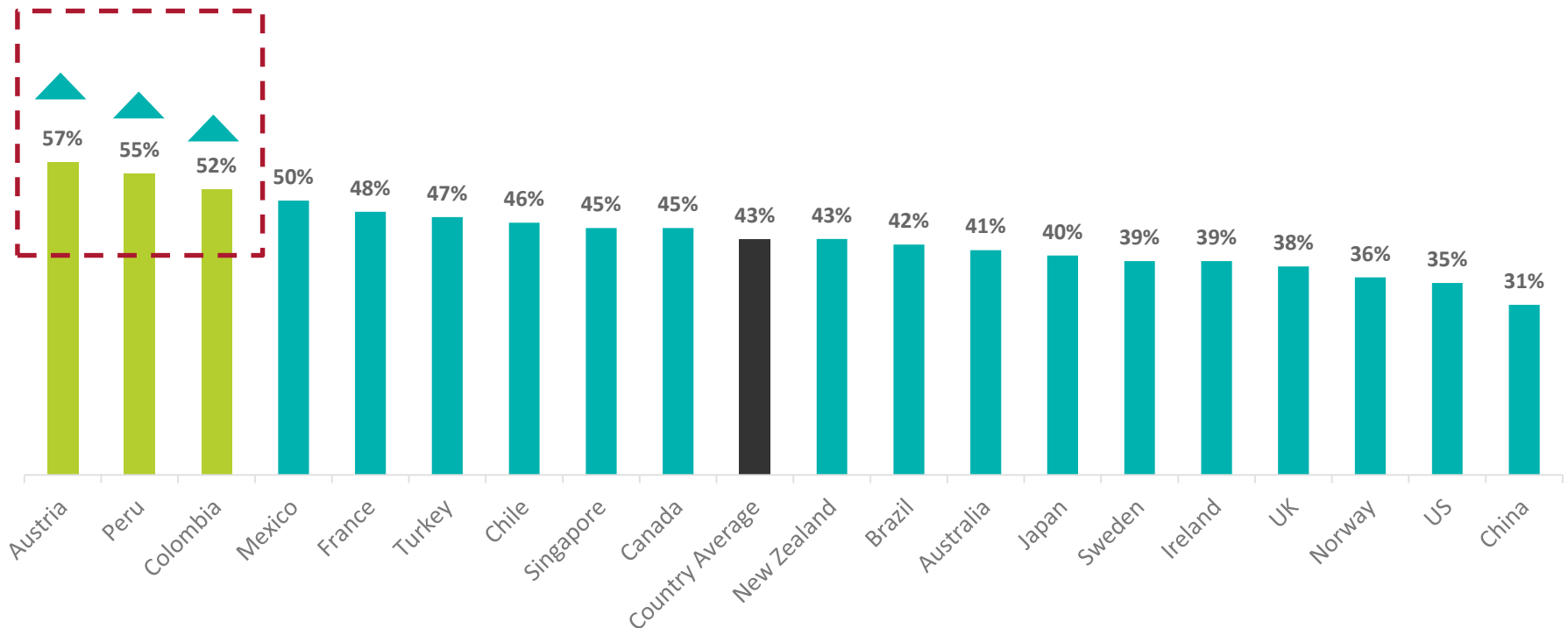
Q9. When did you first purchase an item or service via your smartphone or tablet? **Regional Overview**



Austria, Peru and Colombia are key new adopter markets with significantly more consumers making their 1st purchase on mobile within the past year.

Q9. When did you first purchase an item or service via your smartphone or tablet?

Those who first purchased within the past year - Market Breakdown



Section 2: Motivations and Satisfaction

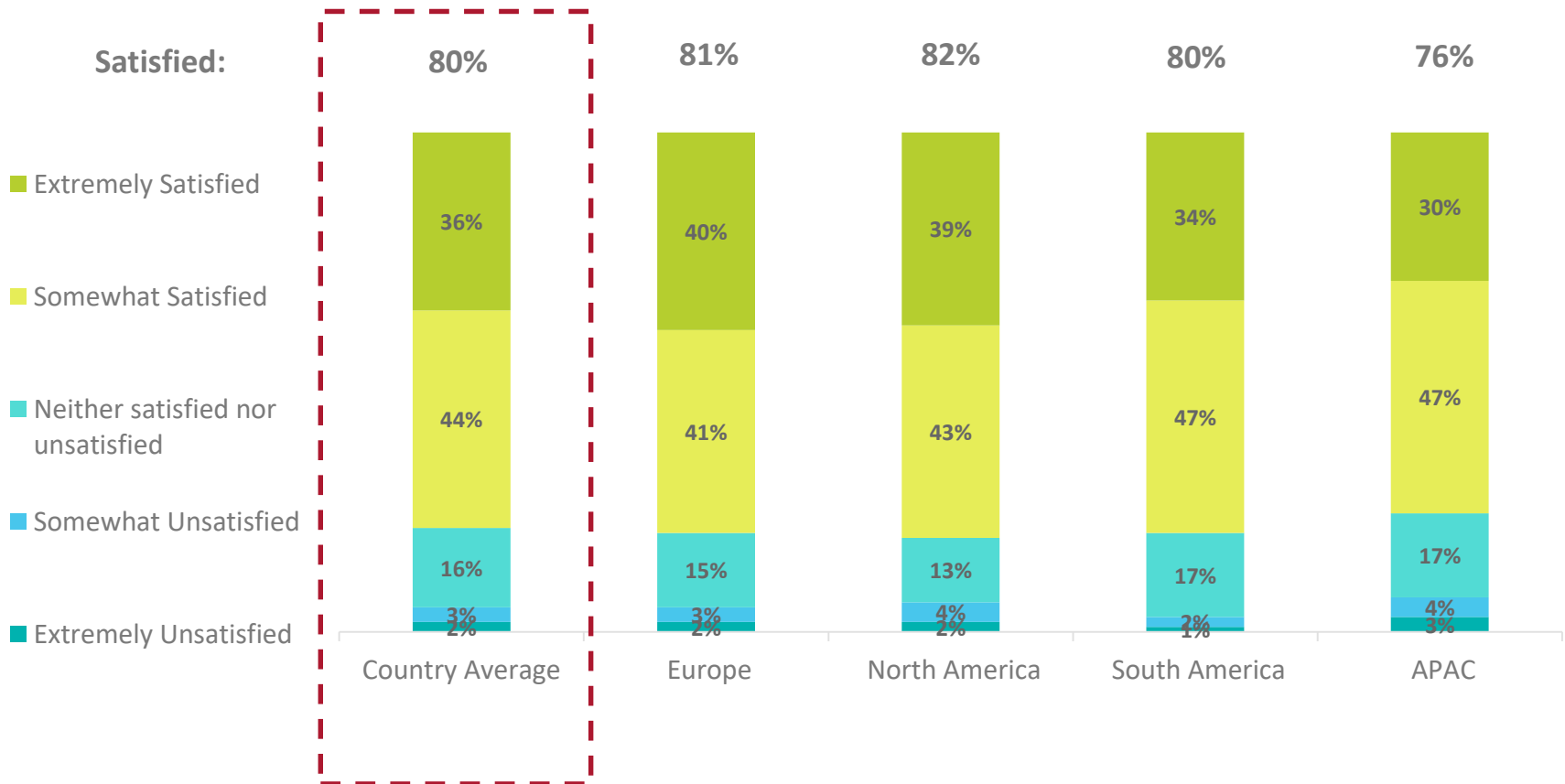


Headline: Mobile purchase is driven by convenience and value. Overall satisfaction and future momentum are high!

- **80% of mobile purchasers are satisfied with their purchase experience to date.**
 - In the UK and Canada, this increases to 89% and 86% respectively.
- **Consumers indicate a positive momentum of their future purchases on mobile.**
 - 62% plan to purchase more products and services via their smartphone/tablet in the next six months.
 - This appetite for future purchase is seen across all markets – although it should be noted some may require greater attention than others in order to capitalise upon this momentum.
- **Convenience (49%) and time saving (46%) are the key drivers of mobile purchases.**
 - Price (34%) also plays an important role.
 - Ensuring that these benefits/needs are met and communicated is vital in order to facilitate growth.
- **But be aware! There are some clear areas in which consumers must be supported and assured for mobile commerce to reach its full potential.**
 - 44% of mobile purchasers cite 'trust' as a barrier for purchasing more via their smartphone/tablet, while 31% feel they have no need.
 - In terms of trust, security and privacy are the key concerns.
 - In order to win back the hearts of those who are dissatisfied with their experience, proving value/reducing expense and improving purchase experience is a must.

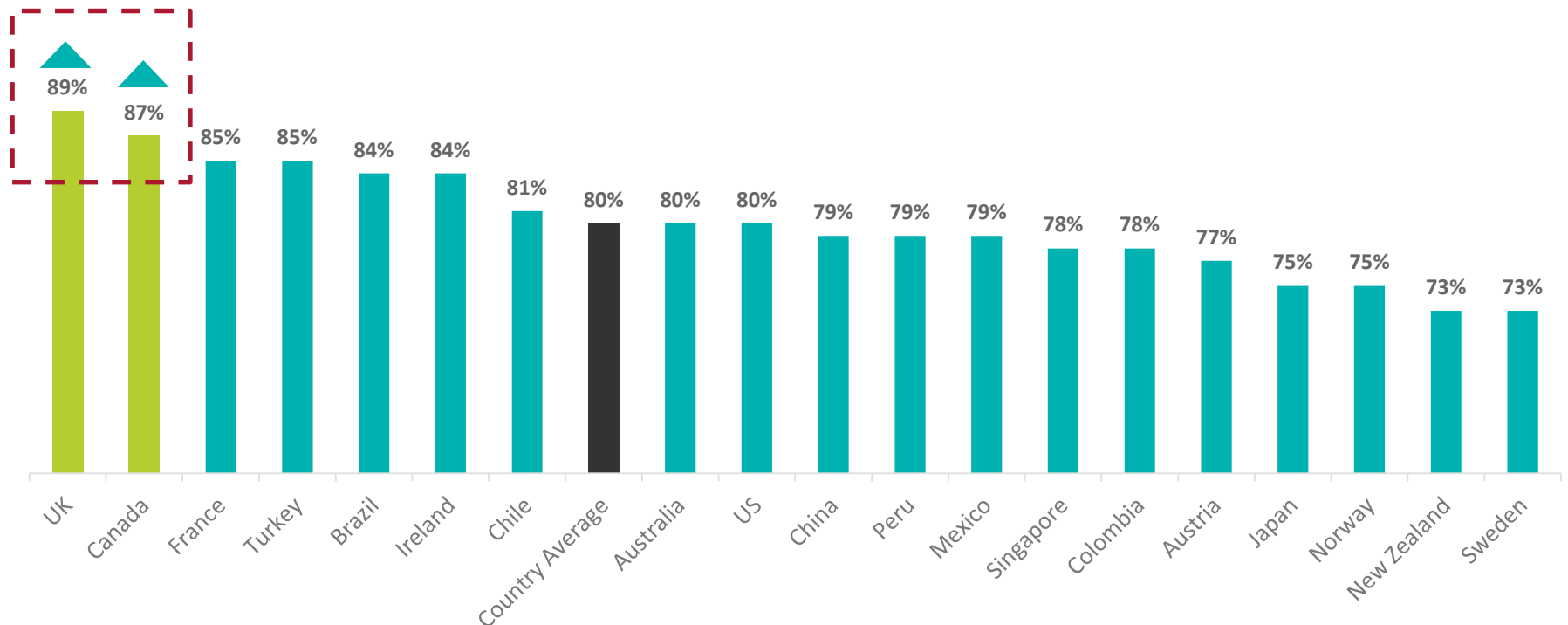
80% of mobile purchasers are satisfied with their mobile purchase experience.

Q14. And how satisfied are you with your experience purchasing products and services via your smartphone or tablet? **Regional Breakdown**



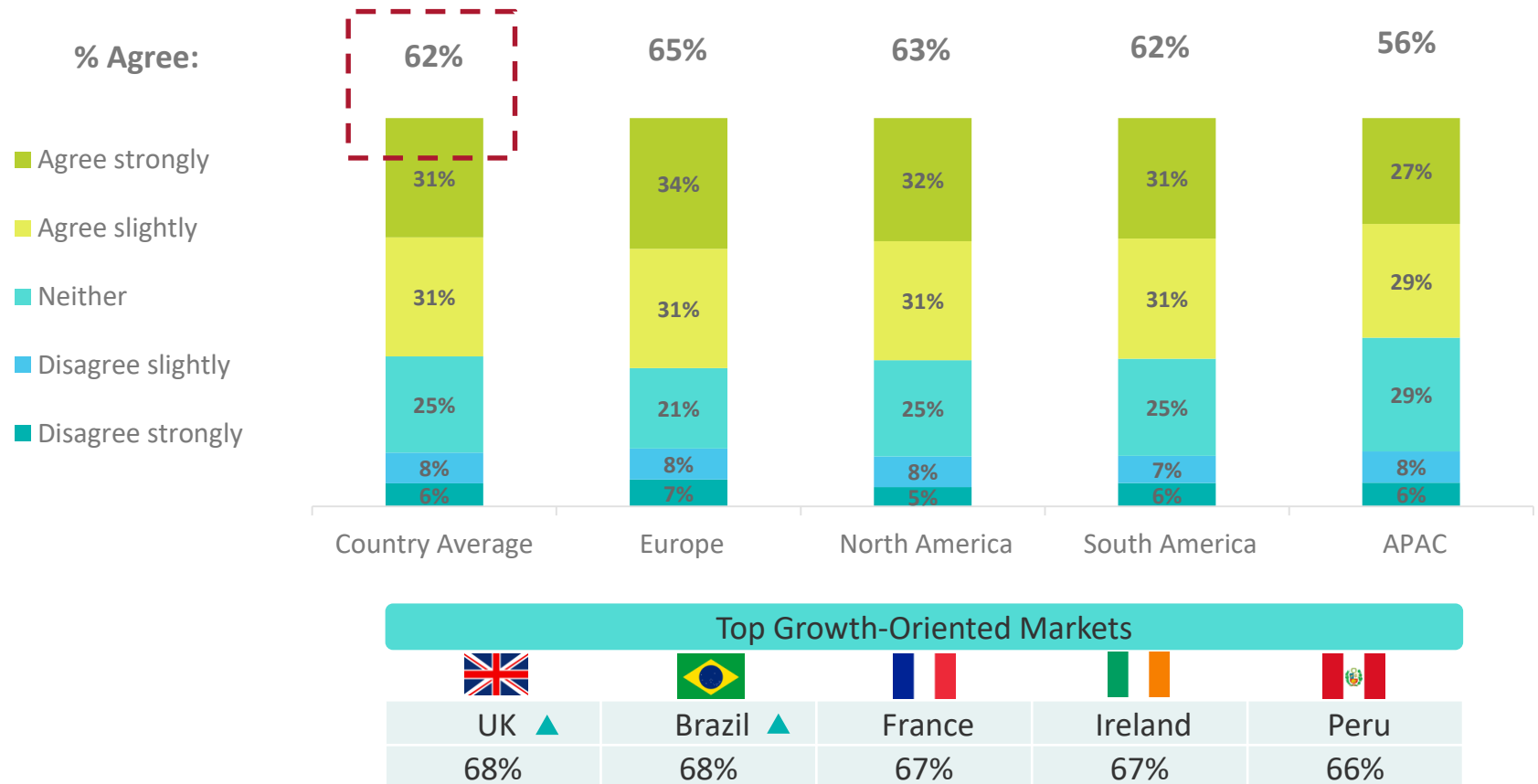
Consumers in the UK and Canada are the most satisfied with their mobile purchase experience.

Q14. And how satisfied are you with your experience purchasing products and services via your smartphone or tablet? **Market Breakdown**



62% of mobile purchasers plan to purchase more products or services via their mobile device in the next 6 months.

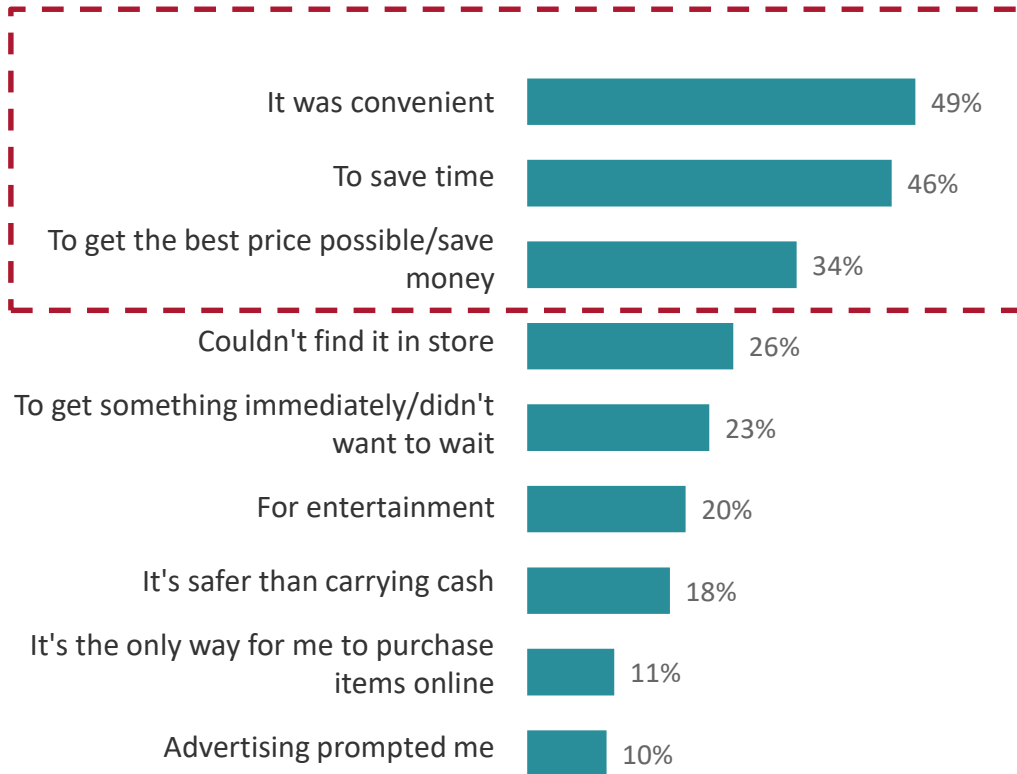
Q24. To what extent do you agree with the following statements?: I plan to purchase more products or services on smartphone or tablet in the next 6 months.



Convenience (49%) and saving time (46%) are the key triggers and motivations of purchase, followed by price.

Q15. Why do you purchase products or services via your smartphone or tablet? Select all that apply.
Regional Breakdown.

All Participating Countries' Average



Europe	North America	South America	APAC
52%	48%	39%	55%
44%	44%	50%	45%
35%	32%	35%	33%
29%	24%	25%	25%
23%	28%	22%	23%
20%	22%	17%	21%
16%	15%	23%	18%
11%	11%	8%	12%
10%	11%	12%	10%



Base: Mobile purchasers in all participating countries (3800), regional: Europe (1400), North America (600), South America (800), APAC (1000)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval



Lack of availability in store plays a stronger influence in France, Ireland and Sweden, while time and convenience are the dominating influences in the UK.

Q15. Why do you purchase products or services via your smartphone or tablet? Select all that apply.
Regional Breakdown Europe

Europe Highlights

All Participating Countries' Average

		Austria	France	Ireland	Norway	Sweden	Turkey	UK
It was convenient	49%	44%	52%	45%	57%	58%	51%	60%
To save time	46%	42%	41%	47%	41%	50%	35%	55%
To get the best price possible/save money	34%	36%	33%	32%	37%	36%	34%	36%
Couldn't find it in store	26%	32%	33%	33%	27%	35%	22%	22%
To get something immediately/didn't want to wait	23%	16%	23%	28%	24%	22%	23%	27%
For entertainment	20%	17%	22%	21%	19%	19%	23%	22%
It's safer than carrying cash	18%	8%	7%	28%	13%	10%	23%	22%
It's the only way for me to purchase items online	11%	10%	10%	8%	12%	14%	11%	11%
Advertising prompted me	10%	12%	9%	8%	11%	9%	8%	12%



Base: Mobile purchasers in all participating countries (3800), per market (200)

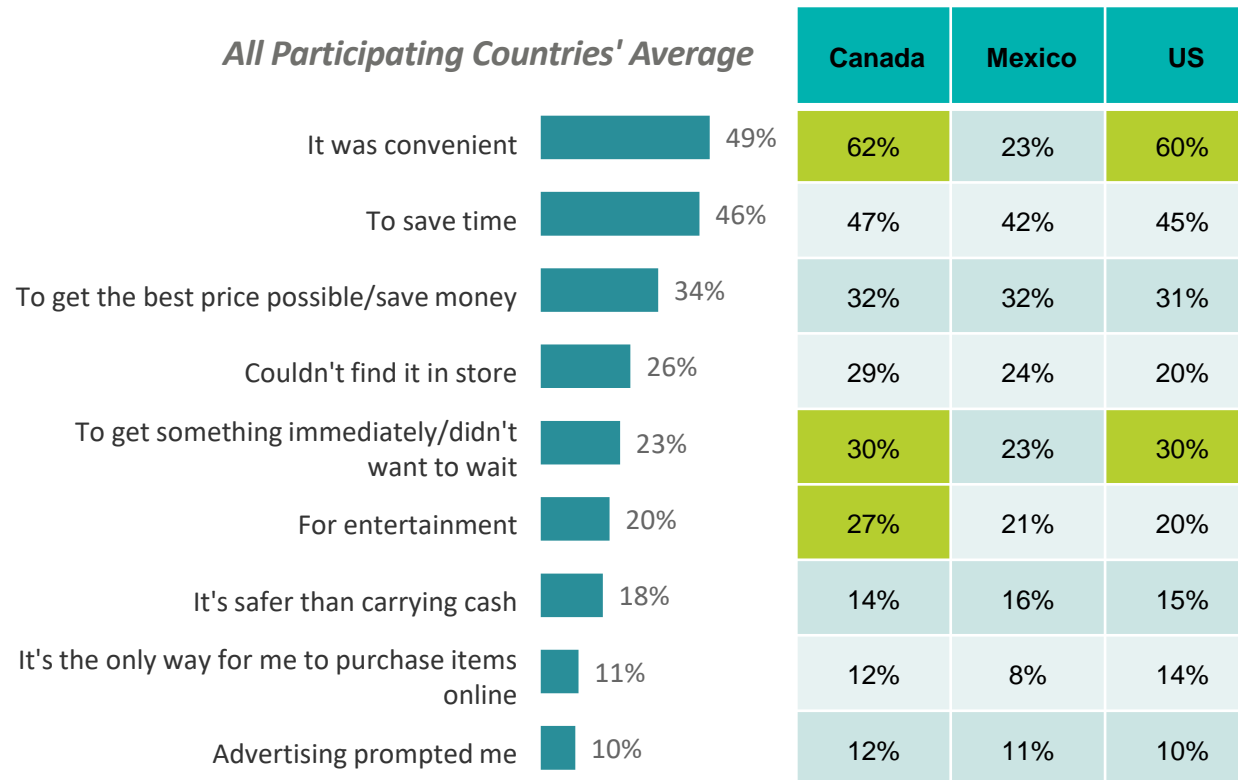
▲ ▼ Significantly higher/lower. Tested at 95% confidence interval



Convenience is the key significant influence on purchase in both US & Canada, with 'speed' (save time & get immediately) the secondary influence.

Q15. Why do you purchase products or services via your smartphone or tablet? Select all that apply
Regional Breakdown Europe

North America Highlights

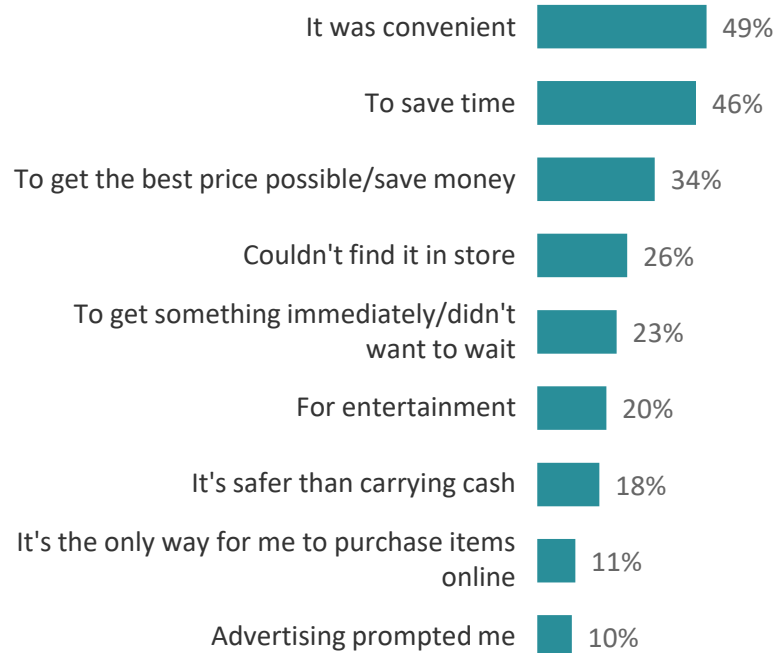


Price and 'safer than cash' are more influential in Brazil. Those in Colombia are more receptive to advertising as a trigger of purchase.

Q15. Why do you purchase products or services via your smartphone or tablet? Select all that apply
Regional Breakdown Europe

South America Highlights

All Participating Countries' Average



Brazil	Chile	Colombia	Peru
40%	33%	50%	33%
51%	49%	47%	53%
47%	35%	36%	25%
24%	29%	23%	24%
22%	18%	21%	27%
11%	22%	13%	20%
25%	23%	19%	25%
13%	9%	6%	6%
7%	11%	17%	14%



Base: Mobile purchasers in all participating countries (3800), per market (200)

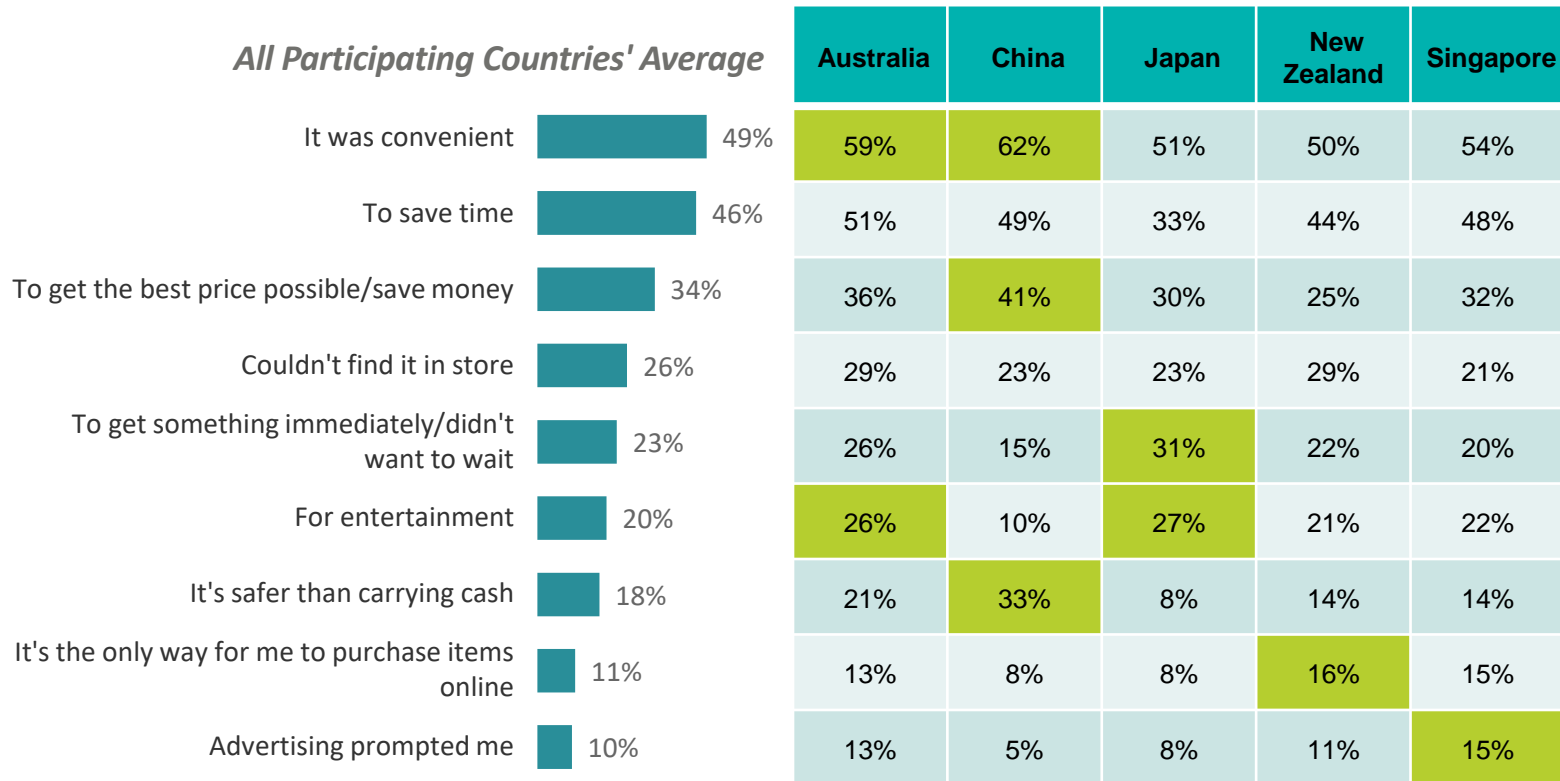
▲ ▼ Significantly higher/lower. Tested at 95% confidence interval



‘Speed’ and ‘entertainment’ have a stronger influence in Japan, while in China price plays a stronger role.

Q15. Why do you purchase products or services via your smartphone or tablet? Select all that apply
Regional Breakdown Europe

APAC Highlights



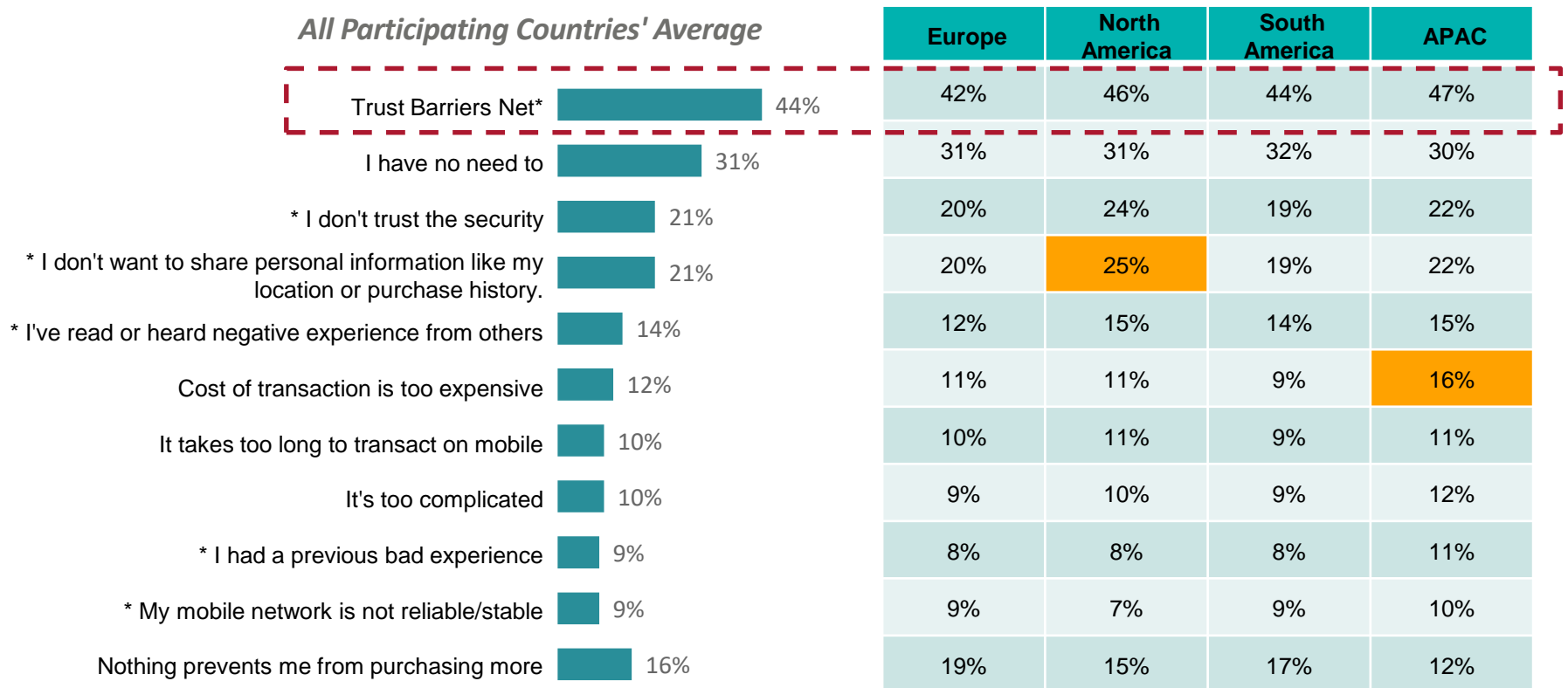
Base: Mobile purchasers in all participating countries (3800), per market (200)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval



However, it should also be noted that consumers, while satisfied and motivated to purchase, do cite 'trust' as a barrier to further growth.

Q16. What are the main reasons you don't purchase more products and services via your smartphone or tablet? Select all that apply. **Regional Breakdown.**

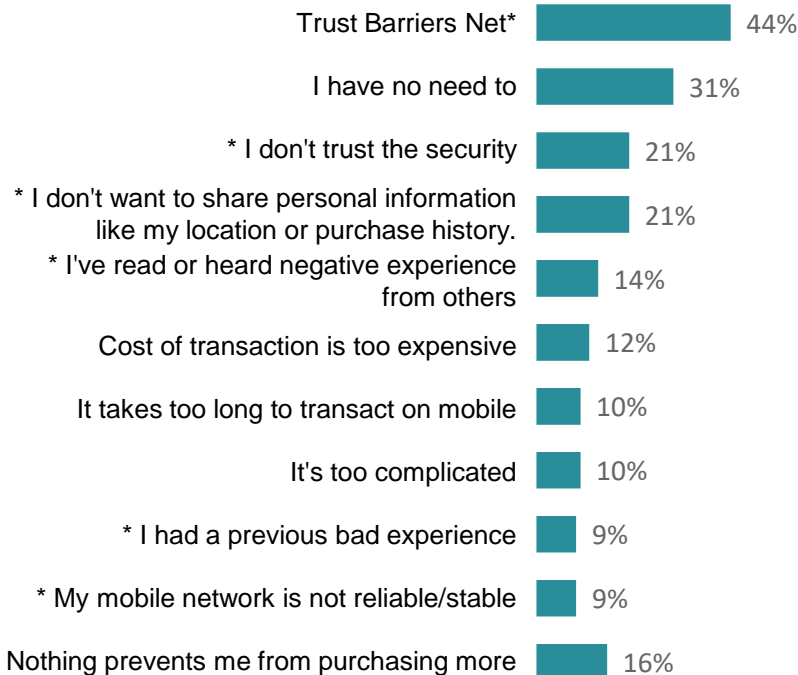


Uniquely in APAC, barriers of cost and length of transaction are also in play.

Q16. What are the main reasons you don't purchase more products and services via your smartphone or tablet? Select all that apply. **Regional Breakdown.**

APAC Highlights

All Participating Countries' Average



	Australia	China	Japan	New Zealand	Singapore
Trust Barriers Net*	45%	56%	35%	45%	56%
I have no need to	34%	21%	32%	32%	31%
* I don't trust the security	21%	22%	19%	24%	24%
* I don't want to share personal information like my location or purchase history.	25%	28%	16%	18%	26%
* I've read or heard negative experience from others	15%	17%	9%	11%	23%
Cost of transaction is too expensive	11%	18%	22%	14%	16%
It takes too long to transact on mobile	10%	15%	7%	12%	10%
It's too complicated	10%	13%	7%	13%	17%
* I had a previous bad experience	8%	14%	7%	11%	14%
* My mobile network is not reliable/stable	10%	11%	7%	11%	10%
Nothing prevents me from purchasing more	16%	10%	16%	16%	6%



Base: Mobile purchasers in all participating countries (3800), per market (200)

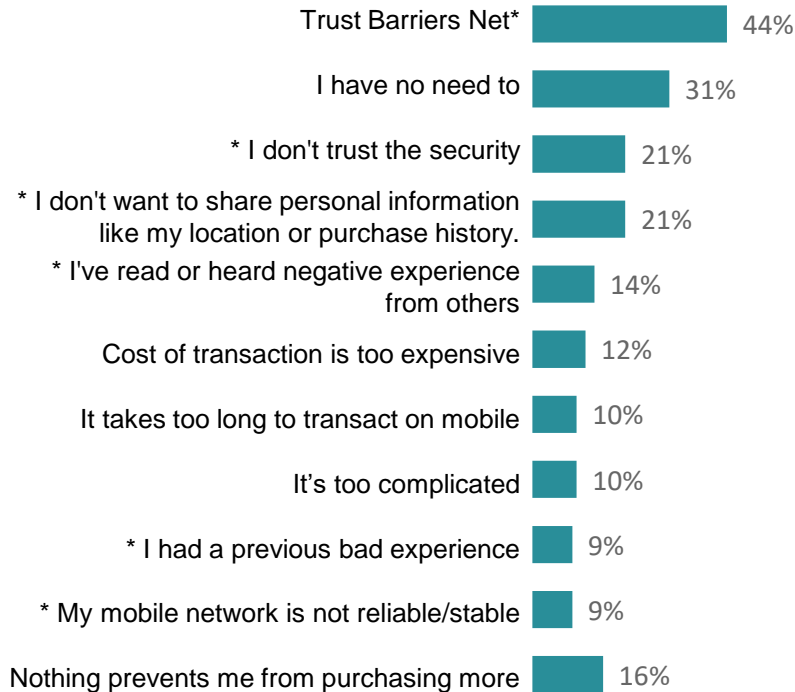
▲ ▼ Significantly higher/lower. Tested at 95% confidence interval



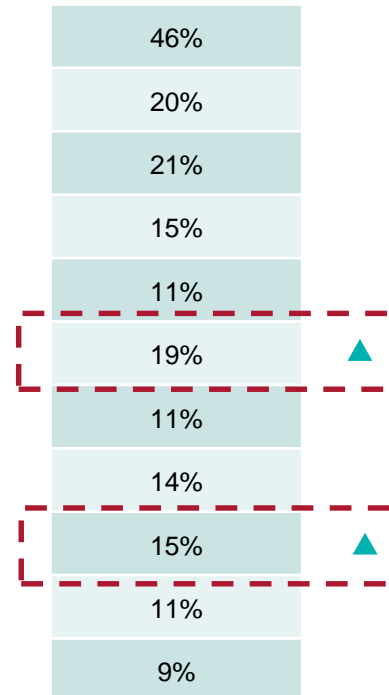
Those who are currently unsatisfied with their mobile purchase experience are more likely to indicate cost and negative purchase experience as barriers.

Q16. What are the main reasons you don't purchase more products and services via your smartphone or tablet? Select all that apply.

All Participating Countries' Average



Those that are *Extremely/Somewhat Unsatisfied* with Experience



Section 3: Purchase Behaviour on Mobile

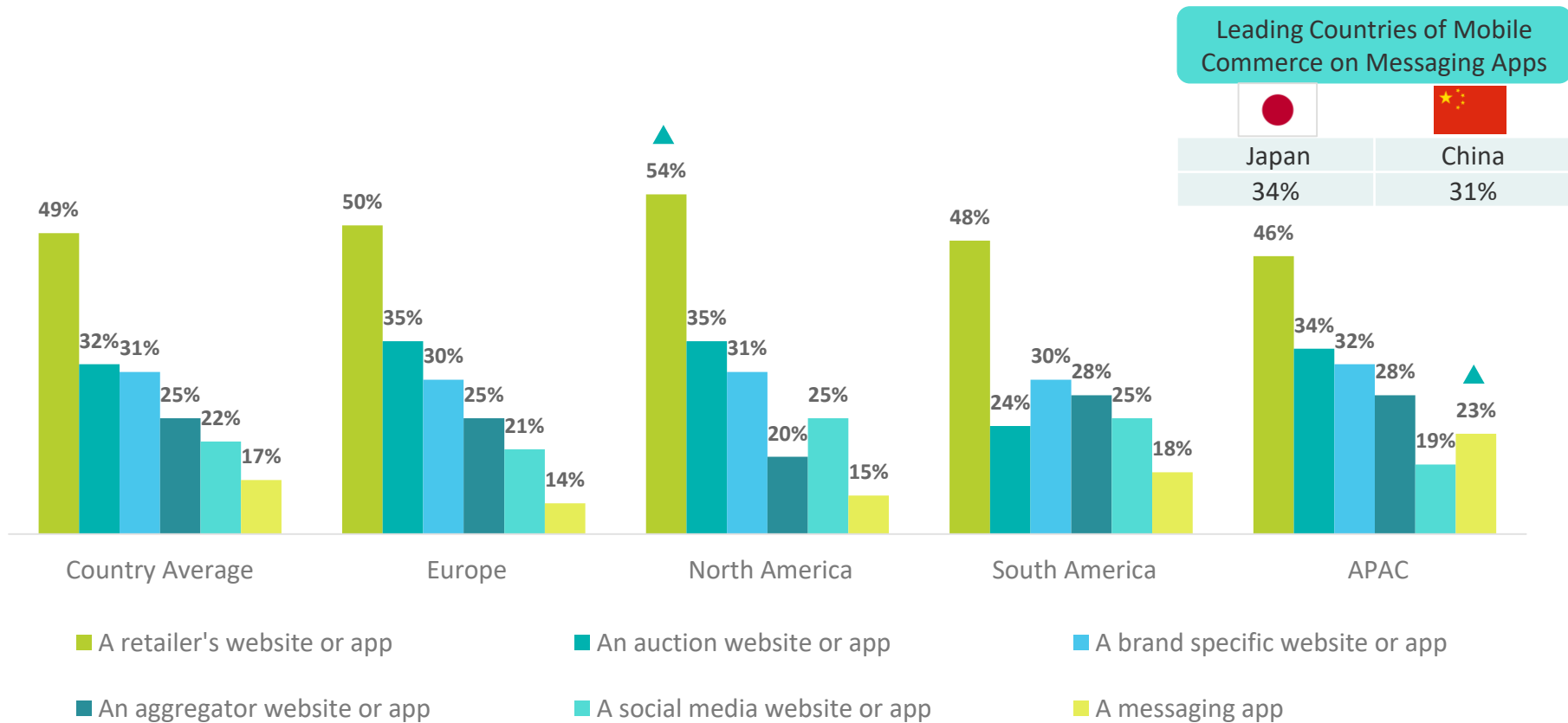


Headline: Mobile purchase is part of a multichannel multiscreen experience

- **The leading destinations of mobile purchases include retailer sites/apps, auction sites/apps, and brand sites/apps.**
- **Consumers purchase a wide range of products and services on mobile.**
 - From mobile apps (43%), fashion items (41%) to tickets (36%) and household items (25%), all product and service types have a clear opportunity to participate in the mobile commerce market place.
 - It should be noted that in South America, public service payments is also key product areas for the region.
- **Cross-channel research and purchase is becoming the new norm. Mobile devices not only serve as a platform for direct purchase, but also aid consumers in their purchase journey, driving multiplatform purchase behavior.**
 - Both 'showrooming' and 'multiscreening' are taking place - 44% of mobile purchasers have purchased a product on their mobile device after checking it out in store, 38% have done the same after researching via laptop/PC.
 - On the flip side, research conducted on mobile devices leads to purchase via other channels – both digital and non digital.
- **Credit/debit cards on mobile web (40%) are the most popular payment method, followed by online payment services (37%).**

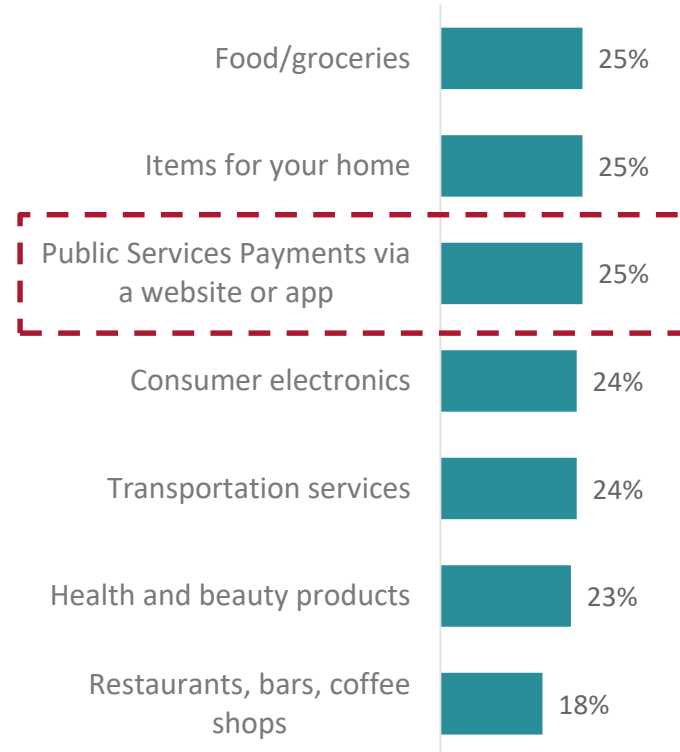
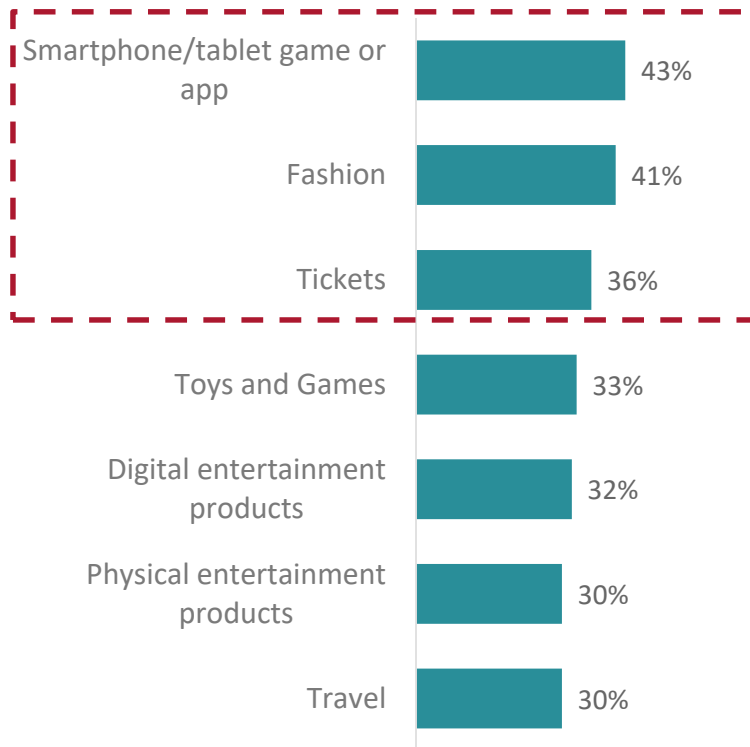
A retailer site/app tops mobile purchase destinations across all regions. Interestingly in APAC messaging apps are more influential.

Q17. Which of the following websites/apps have you used to make purchase via your smartphone or tablet? Please select all that apply. Regional Overview



Consumers purchase a wide range on mobile, led by apps (43%), fashion (41%) and tickets (36%), all the way through to public service payments (25%).

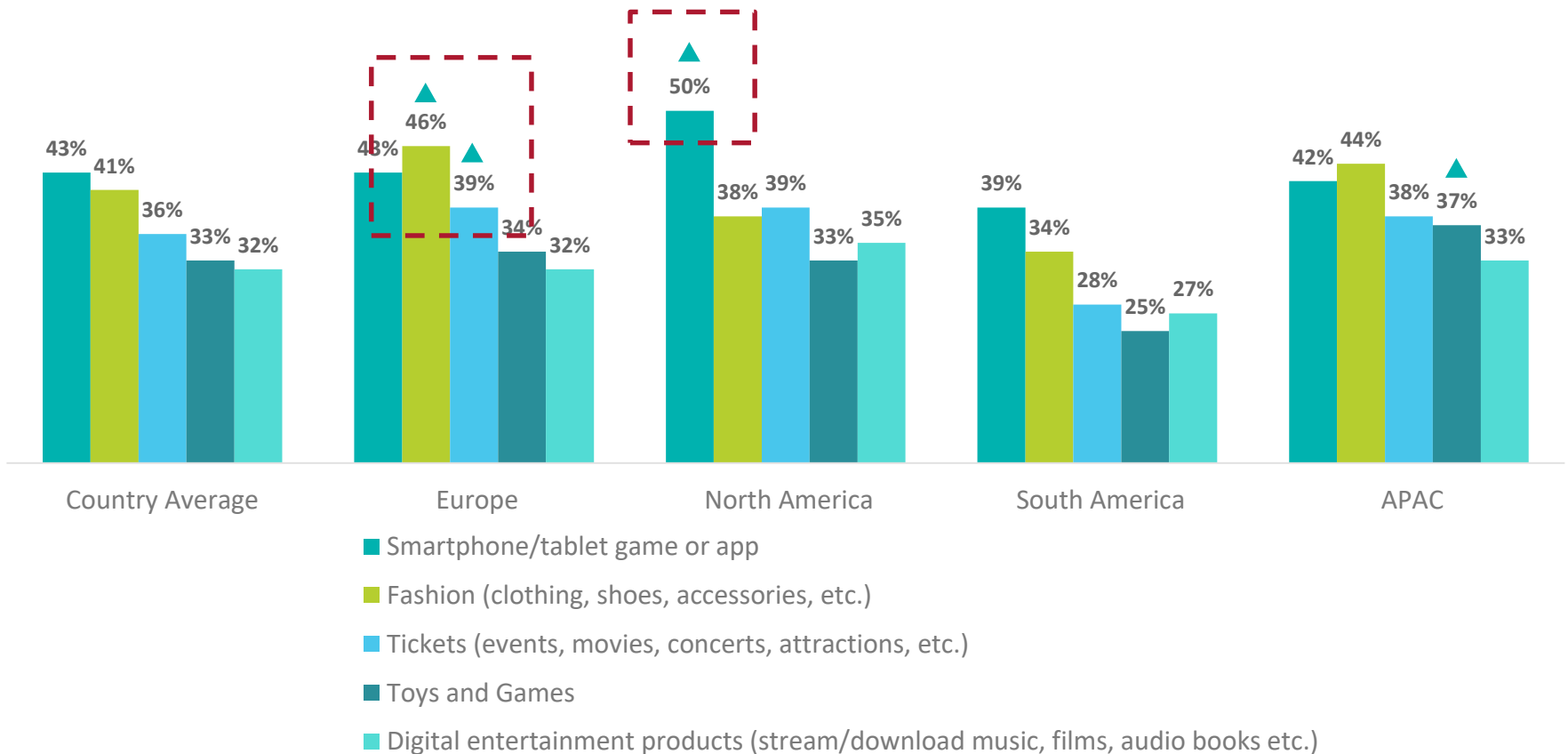
Q10. Which of the following have you purchased via your smartphone or tablet? Select all that apply.



In Europe, fashion items are purchased significantly more, while the same is true of apps in North America.

Q10. Which of the following have you purchased via your smartphone or tablet? Select all that apply.

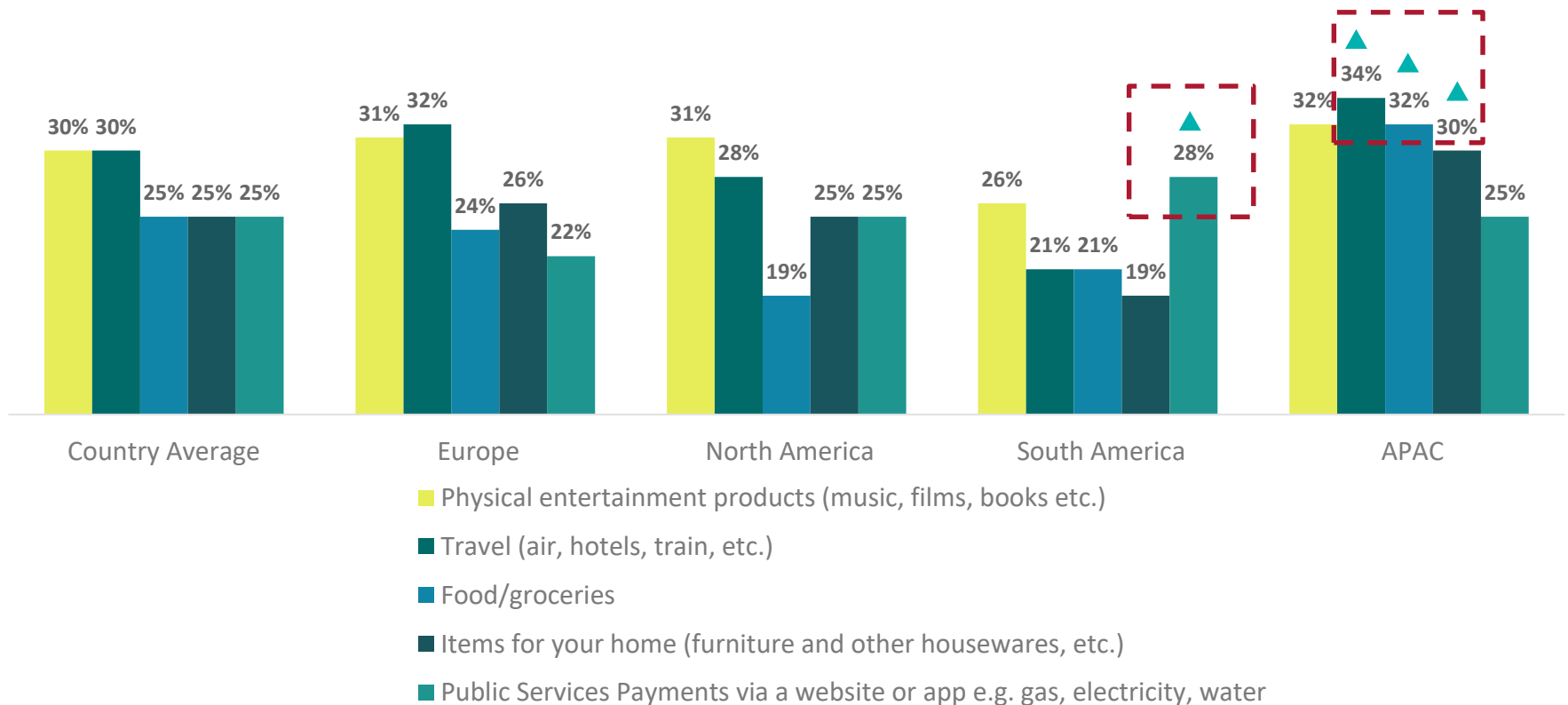
Regional Breakdown



In South America, more public service payments occur via mobile. In APAC, travel, food, and home items are significantly more popular.

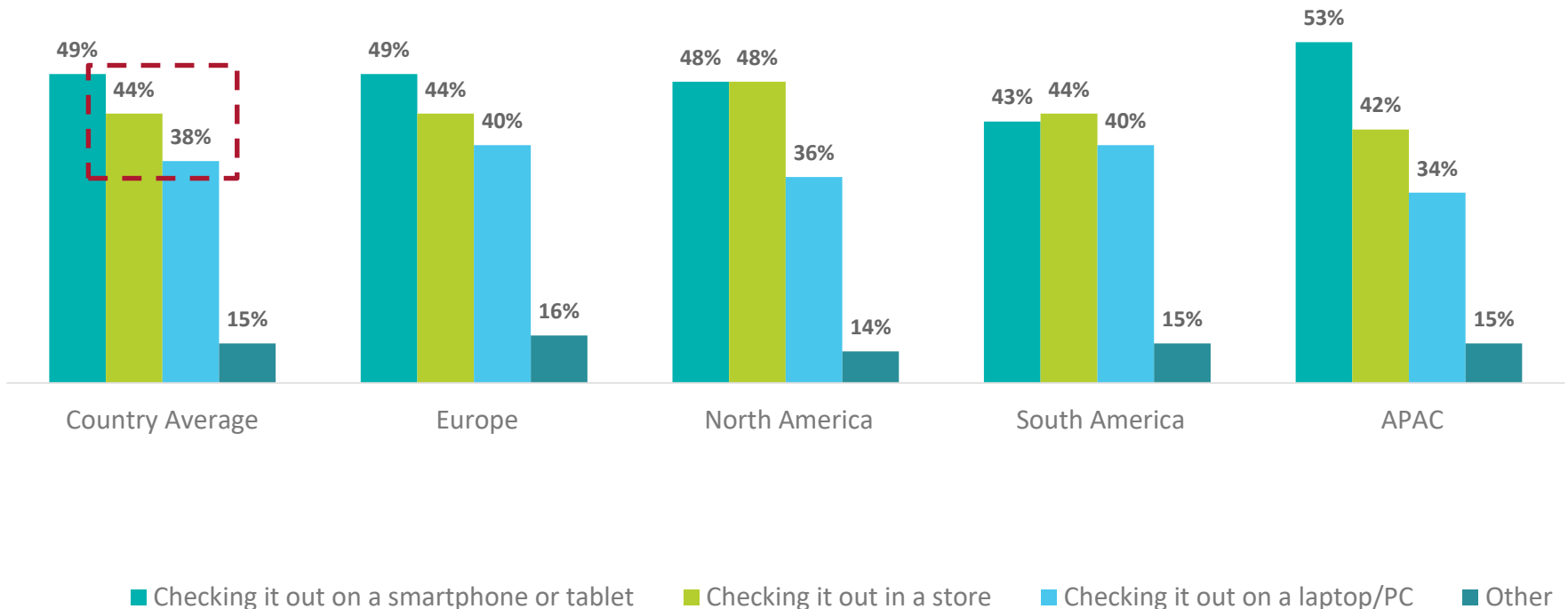
Q10. Which of the following have you purchased via your smartphone or tablet? Select all that apply.

Regional Breakdown



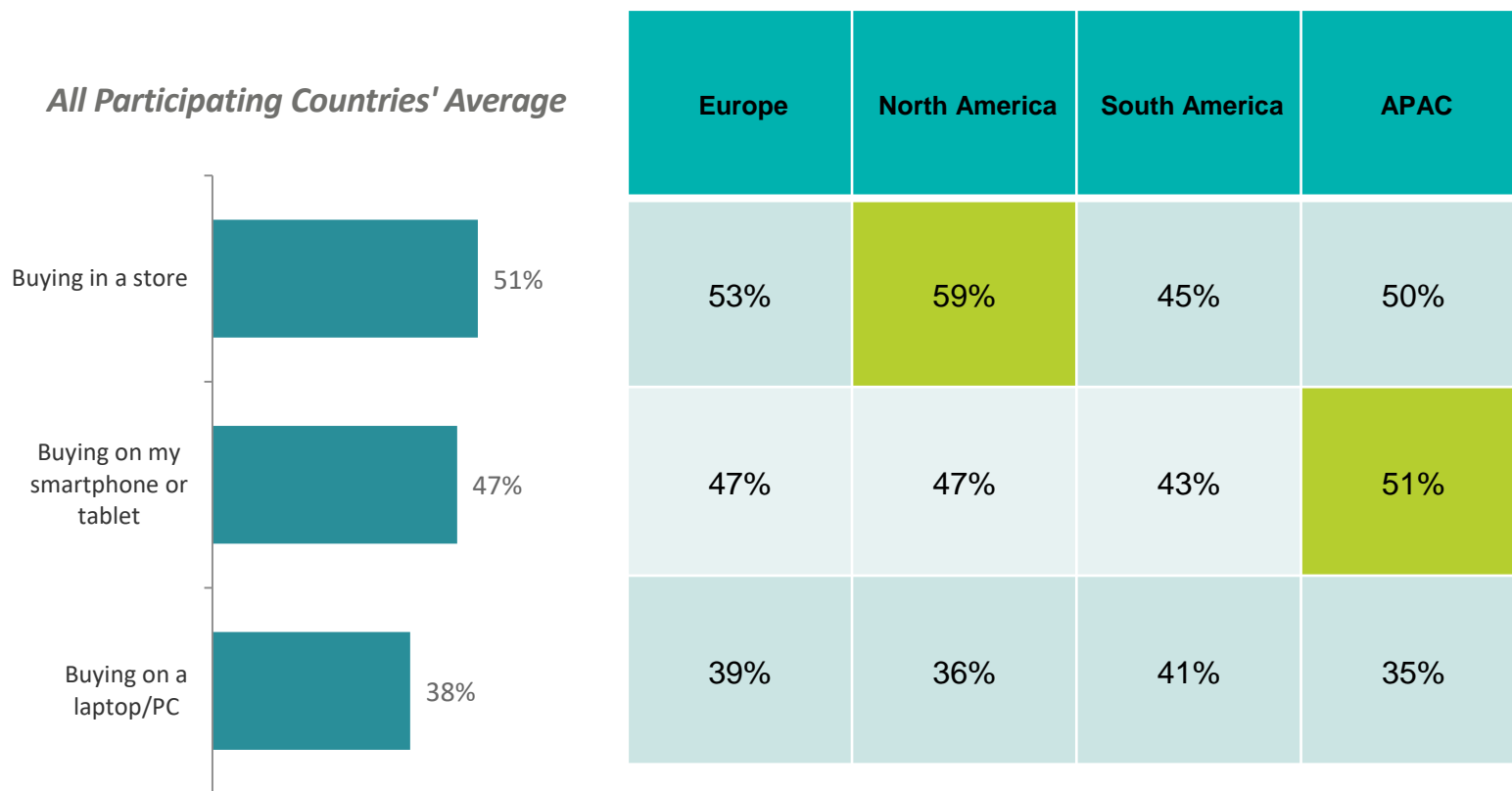
Mobile purchase is part of a multichannel experience - showrooming and multiscreen purchase behaviors are common

Q21. Have you ever purchased a product or service on your smartphone or tablet after doing the following? Select all that apply. **Regional Breakdown**



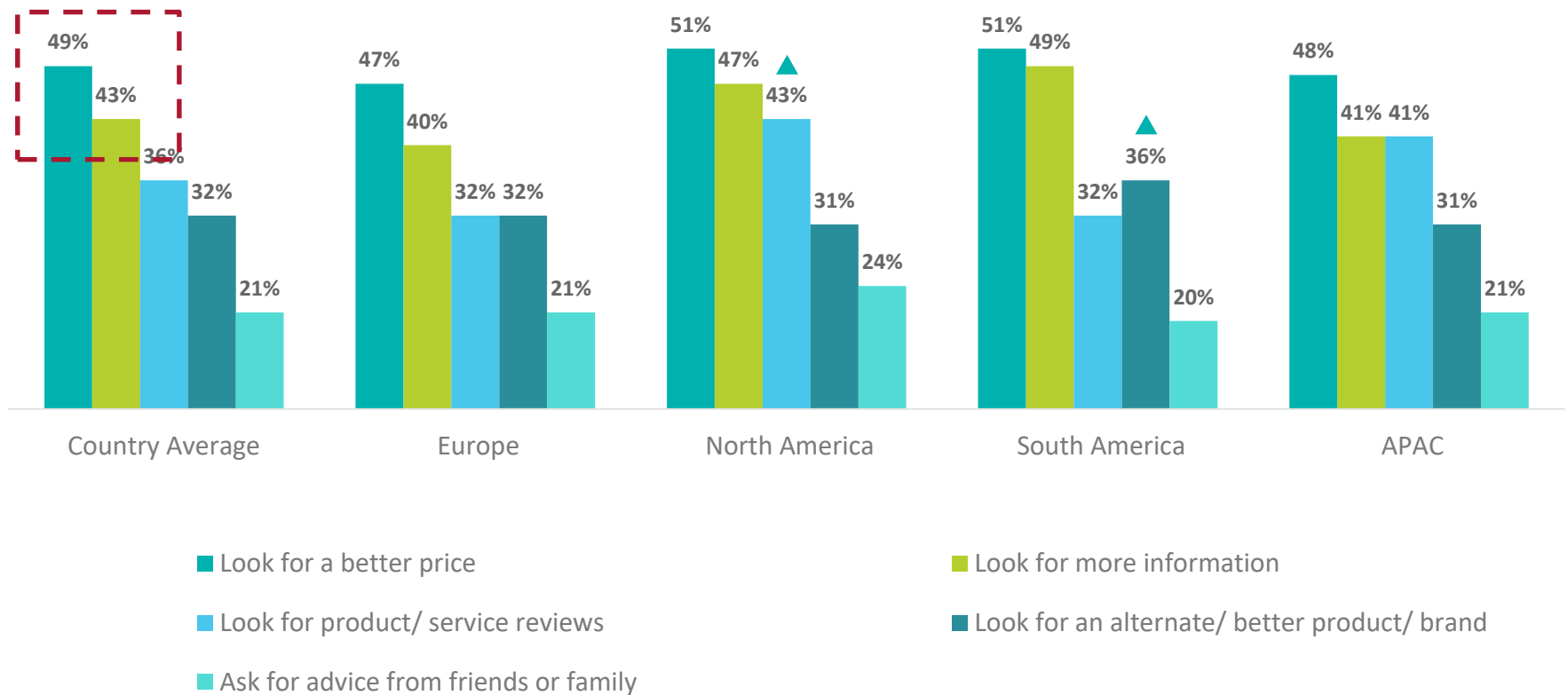
Research on mobile devices contributes to purchases across other channels; in-store, online and mobile are symbiotic in an omnichannel world

Q22. Have you ever found or researched a product or service on your smartphone or tablet, and ended up buying it in the following ways? Select all that apply. **Regional Breakdown.**



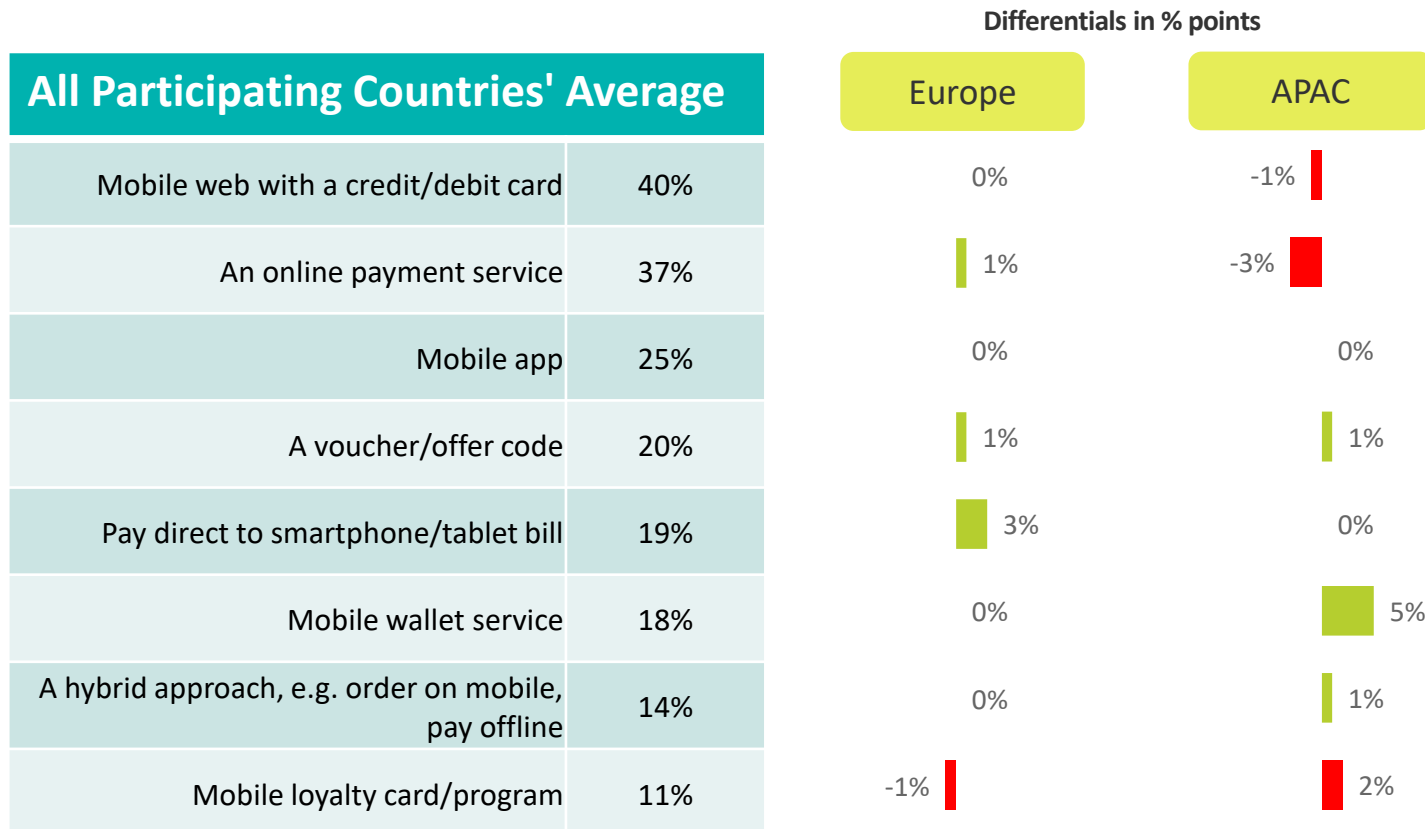
Mobile purchasers regularly turn to mobile devices for research and comparison shopping while in store.

Q20. Which of the following do you regularly do in store with your smartphone or tablet? Select all that apply. **Regional Breakdown**



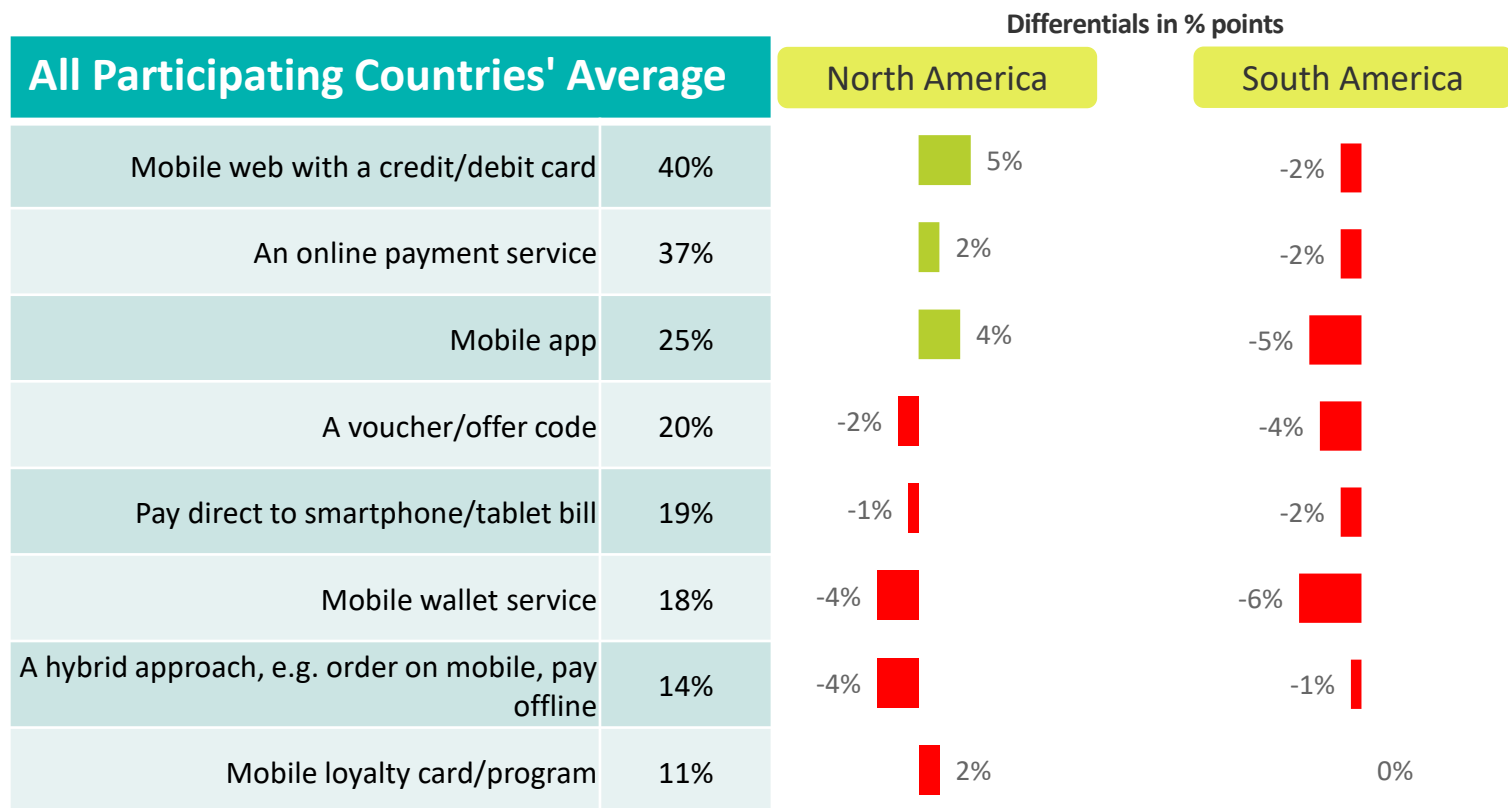
Credit/debit cards on mobile web and online payment services are the most popular payment methods. Mobile wallets are more popular in APAC.

Q13. How have you paid for the products or services you bought via your smartphone/tablet in the past six months? Please select all that apply **Regional Breakdown**



In North America, mobile web with credit/debit cards, online payment services, and mobile apps are most used.

Q13. How have you paid for the products or services you bought via your smartphone/tablet in the past six months? Please select all that apply **Regional Breakdown**



Section 4: The Impact of Mobile Ads and Social Media

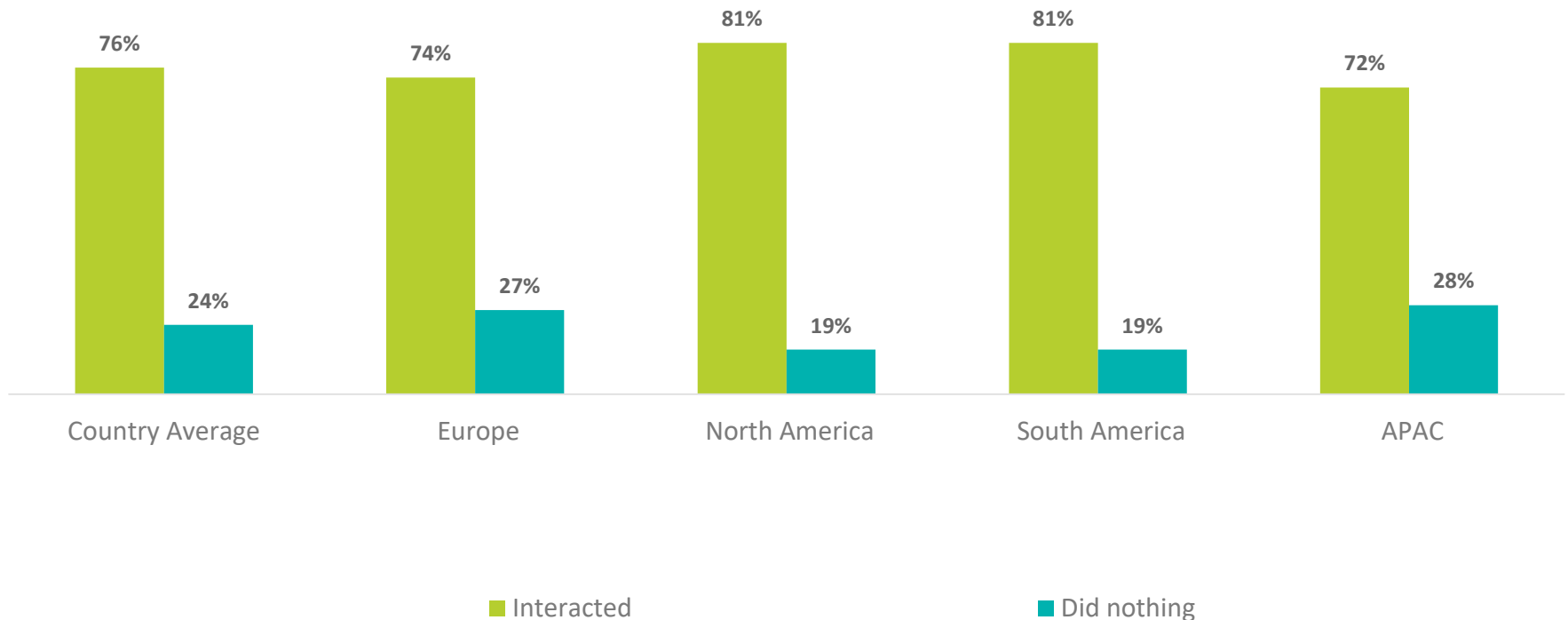


Headline: Mobile ads and social media play an important role in mobile commerce.

- **76% of mobile purchasers have engaged with a mobile ad in the past six months.**
 - On average, 33% clicked on the ad to find out more information, while 28% clicked to visit the advertisers websites and 21% clicked to purchase!
- **Social media plays a key role in product and service discovery.**
 - 60% of mobile purchasers often find new products and services to buy via this channel.
 - The influence of social media in product discovery is most pronounced in South America.
- **And it also offers consumers a channel to share their mobile purchases and experiences.**
 - 36% indicate they like to share mobile purchases and experiences online.
 - Given the strong levels of satisfaction consumers display with their mobile purchase experience, there are opportunities for digital merchants and retailers to encourage and motivate consumers to share their positive sentiment via social media.

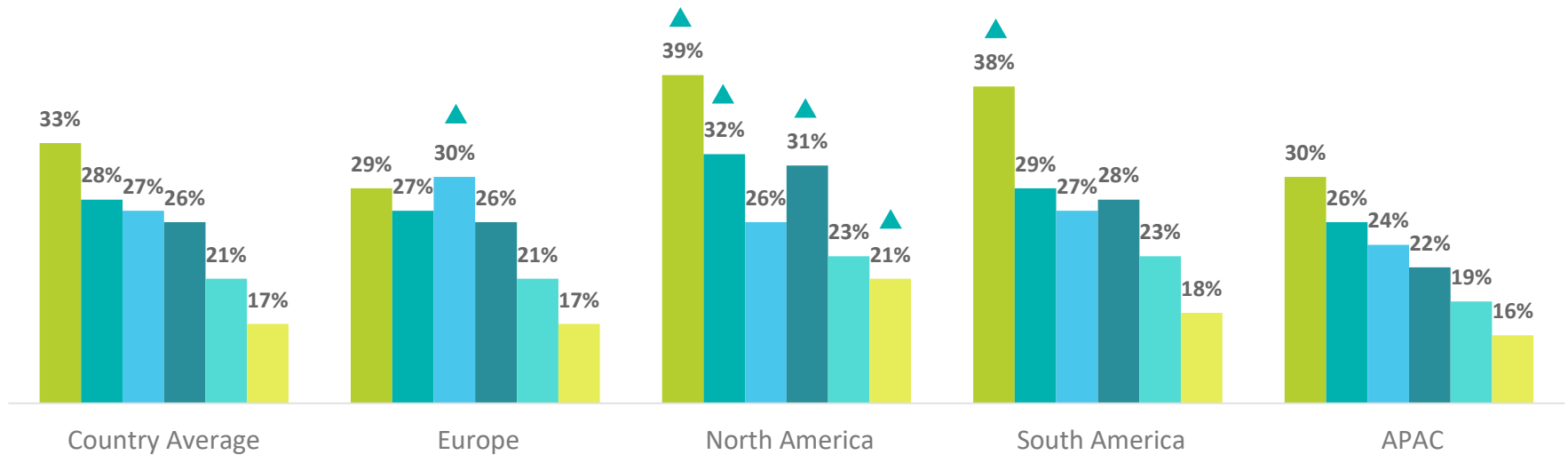
Mobile advertising offers a clear route to consumer engagement – on average 76% of mobile purchasers have interacted with mobile ads in the past six months.

Q23. In the past 6 months, have you done any of the following after seeing an ad on your smartphone or tablet? Select all that apply. **Regional Breakdown**



Consumers primarily interact by clicking on ads to find out more information or visit the advertiser's website.

Q23. In the past 6 months, have you done any of the following after seeing an ad on your smartphone or tablet? Select all that apply. **Regional Breakdown**



■ Clicked on the ad to find out more information

■ Checked out the product or service at another time

■ Clicked on the ad to purchase the product/service

■ Clicked on the ad to visit the advertiser's website

■ Visited the advertiser's website another time

■ Shared the ad with others



Base: Mobile purchasers in all participating countries (3800), regional: Europe (1400), North America (600), South America (800), APAC (1000)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval



Levels of mobile ad sharing and clicking to purchase are strong in the UK. In Austria, consumers appear to be less engaged with mobile advertising.

Q23. In the past 6 months, have you done any of the following after seeing an ad on your smartphone or tablet? Select all that apply. **Regional Breakdown**

Europe Highlights

	Country Average	Austria	France	Ireland	Norway	Sweden	Turkey	UK
Clicked on the ad to find out more information	33%	16%	30%	36%	38%	35%	25%	28%
Clicked on the ad to visit the advertisers website	28%	17%	27%	27%	26%	30%	28%	33%
Checked out the product or service at another time	27%	30%	22%	29%	38%	33%	26%	32%
Visited the advertiser's website another time	26%	17%	25%	26%	30%	31%	24%	27%
Clicked on the ad to purchase the product/ service	21%	17%	21%	18%	22%	22%	23%	27% ▲
Shared the ad with others	17%	14%	16%	16%	14%	16%	17%	24% ▲



Base: Mobile purchasers in all participating countries (3800), per market (200)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval



Consumers in Canada, like those in the UK, are more likely to click to purchase and share mobile advertising.

Q23. In the past 6 months, have you done any of the following after seeing an ad on your smartphone or tablet? Select all that apply. **Regional Breakdown**

North America Highlights

	Country Average	Canada	Mexico	US
Clicked on the ad to find out more information	33%	41% ▲	38%	39%
Clicked on the ad to visit the advertisers website	28%	31%	31%	34%
Checked out the product or service at another time	27%	32%	9%	37% ▲
Visited the advertiser's website another time	26%	34% ▲	32%	28%
Clicked on the ad to purchase the product/ service	21%	27% ▲	18%	24%
Shared the ad with others	17%	23% ▲	20%	21%



Base: Mobile purchasers in all participating countries (3800), per market (200)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval



Those in Brazil, Colombia and Peru are significantly more likely to interact with mobile advertising by clicking on the ad.

Q23. In the past 6 months, have you done any of the following after seeing an ad on your smartphone or tablet? Select all that apply. **Regional Breakdown**

South America Highlights

	Country Average	Brazil	Chile	Colombia	Peru
Clicked on the ad to find out more information	33%	44% ▲	28%	40% ▲	41% ▲
Clicked on the ad to visit the advertisers website	28%	33%	20%	36% ▲	26%
Checked out the product or service at another time	27%	31%	20%	30%	28%
Visited the advertiser's website another time	26%	32%	26%	29%	25%
Clicked on the ad to purchase the product/ service	21%	25%	22%	25%	21%
Shared the ad with others	17%	19%	15%	20%	21%



Base: Mobile purchasers in all participating countries (3800), per market (200)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval



While APAC follows similar patterns, it should be noted that those in Japan are significantly less likely to share any mobile advertising.

Q23. In the past 6 months, have you done any of the following after seeing an ad on your smartphone or tablet? Select all that apply. **Regional Breakdown**

APAC Highlights

	Country Average	Australia	China	Japan	New Zealand	Singapore
Clicked on the ad to find out more information	33%	34%	30%	33%	25%	30%
Clicked on the ad to visit the advertisers website	28%	34%	20%	25%	26%	27%
Checked out the product or service at another time	27%	34% ▲	23%	17%	20%	28%
Visited the advertiser's website another time	26%	31%	15%	16%	25%	25%
Clicked on the ad to purchase the product/ service	21%	17%	19%	21%	20%	18%
Shared the ad with others	17%	17%	20%	8%	19%	15%



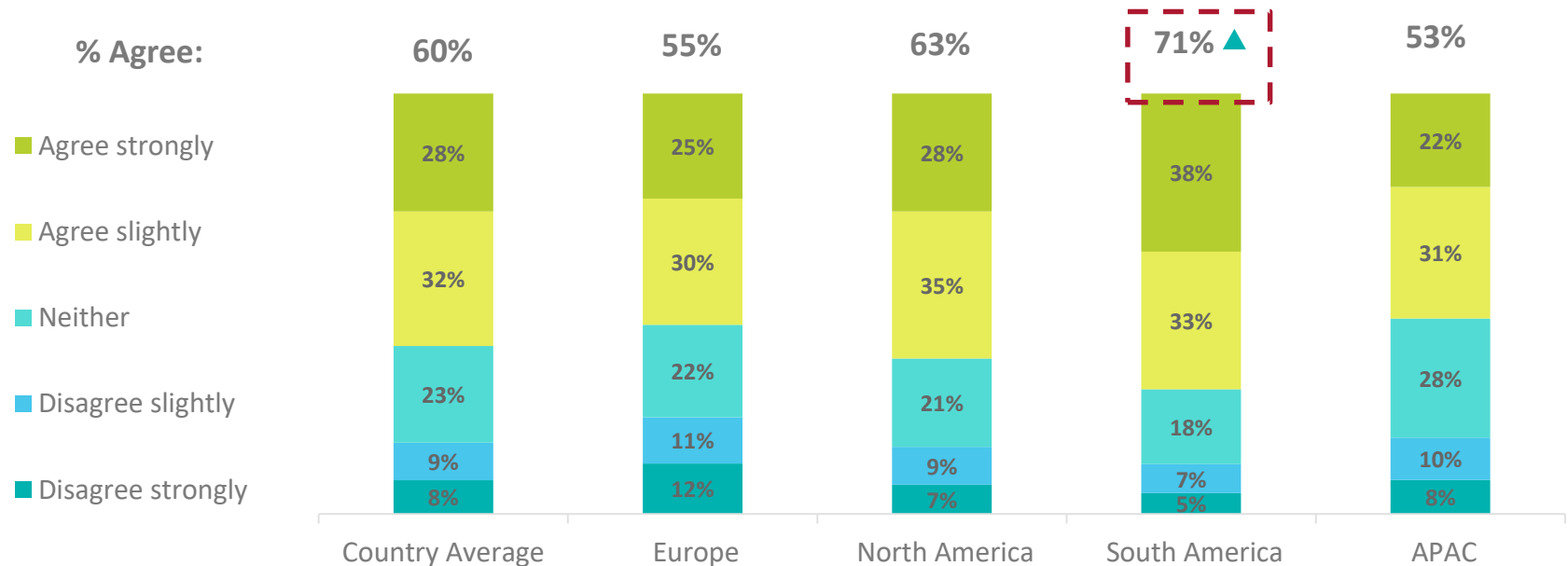
Base: Mobile purchasers in all participating countries (3800), per market (200)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval



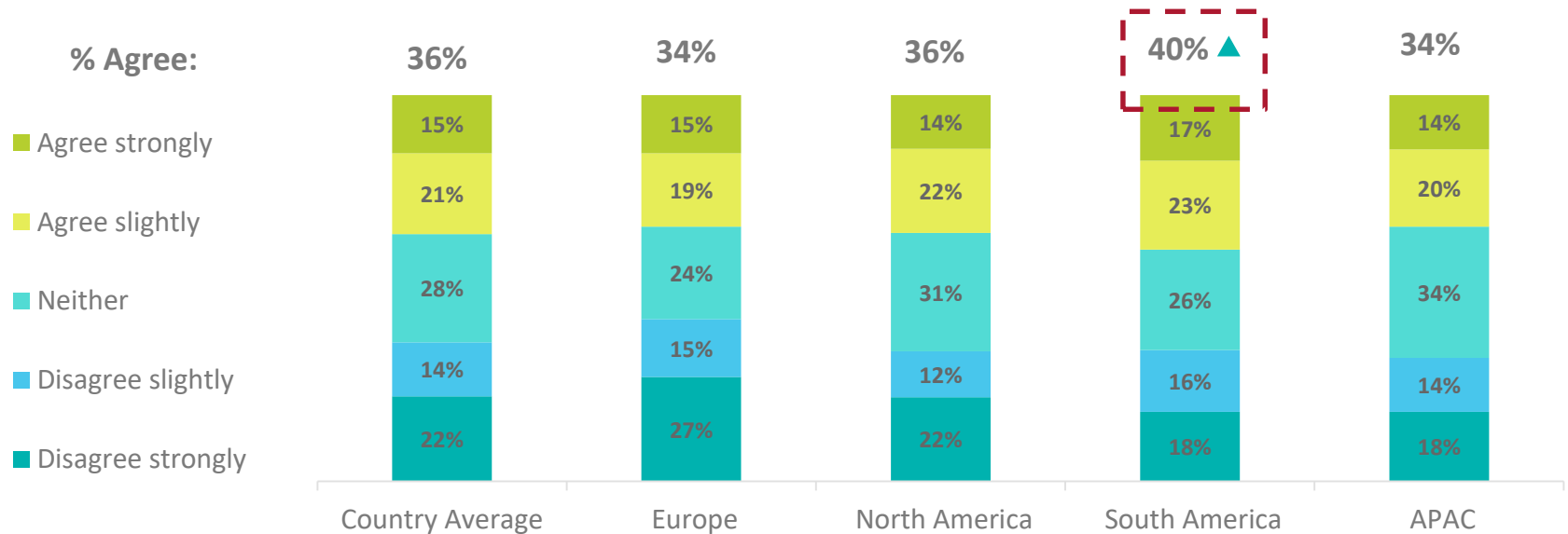
Social media plays a key role in product/service discovery for purchase; this is more pronounced in South America.

Q24. To what extent do you agree with the following statements? I often discover new products or services to buy on social media.



More than one-third of mobile purchasers also leverage social media to share their mobile purchase experience.

Q24. To what extent do you agree with the following statements? I love to share my mobile purchases and experiences online.



Top 3 Sharing Markets via Social Media

		
Turkey	Mexico	Chile
53% ▲	43% ▲	43% ▲

Section 5:

A closer look at Mobile Wallet Usage.

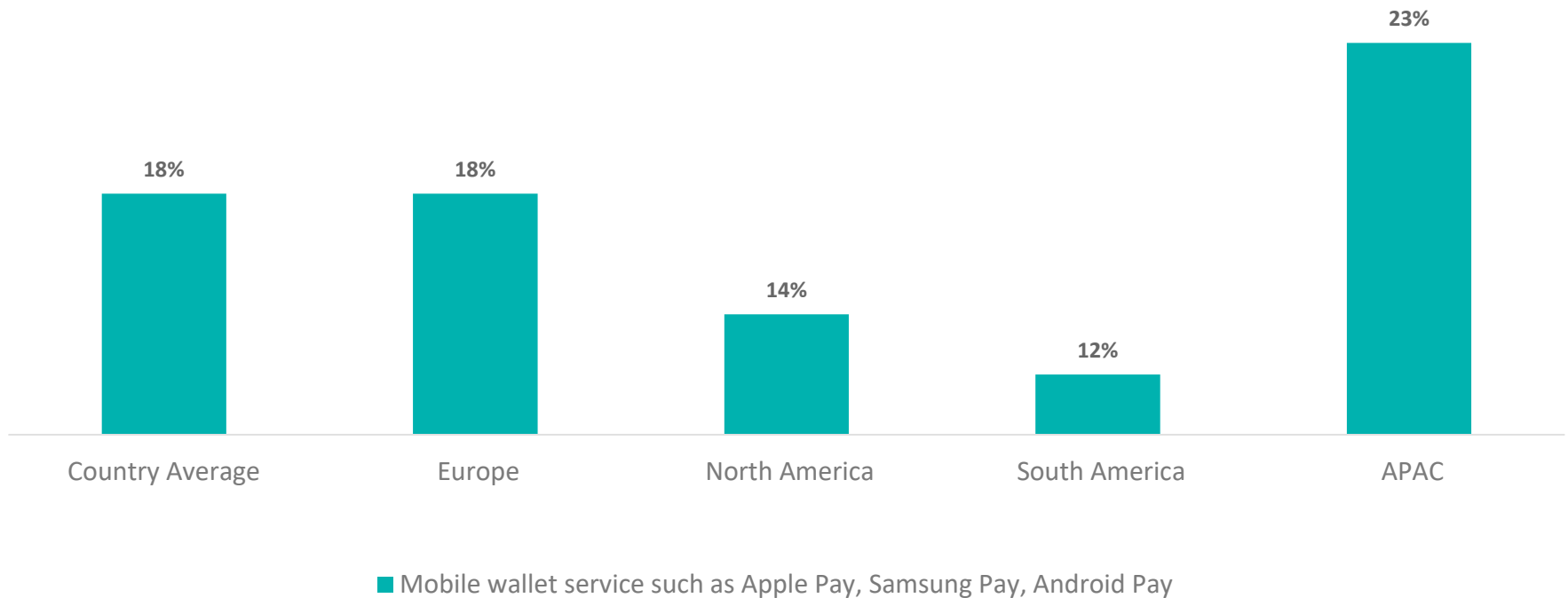


Headline: Mobile wallet usage can further foster mobile commerce.

- **18% of mobile purchasers have used a mobile wallet to pay for products or services, rising to 23% in APAC.**
 - At 47% mobile wallet usage is strongest in China, followed by Norway (42%) and UK (24%).
- **Consumers use mobile wallets to pay for a range of products and services.**
 - No doubt driven by ease/applicability to platform, mobile apps (43%) and digital content (42%) are purchased via mobile wallets.
 - They are also used to purchase physical products (41%) and food/drink items (40%).
- **Mobile wallet users are heavily engaged in mobile commerce and have a significantly more positive market outlook and intention for future purchase on mobile.**
 - They purchase more frequently (47% weekly vs. 23%) than average mobile purchasers.
 - They engage with mobile ads more (82% interacted vs. 76%)
 - They also exhibit significantly stronger optimism towards the future of mobile payments and mobile purchases.
 - As such, they should be considered a key consumer group which could be leveraged to drive the growth of mobile commerce.

On Average, 18% of mobile purchasers have used a mobile wallet to purchase products or services in the past six months; this rises to 23% in APAC.

Q13. How have you paid for the products or services you bought via your smartphone/tablet in the past six months? Please select all that apply: **Mobile Wallet Usage Regional Overview**



Base: Mobile purchasers in all participating countries (3800), regional: Europe (1400), North America (600), South America (800), APAC (1000)

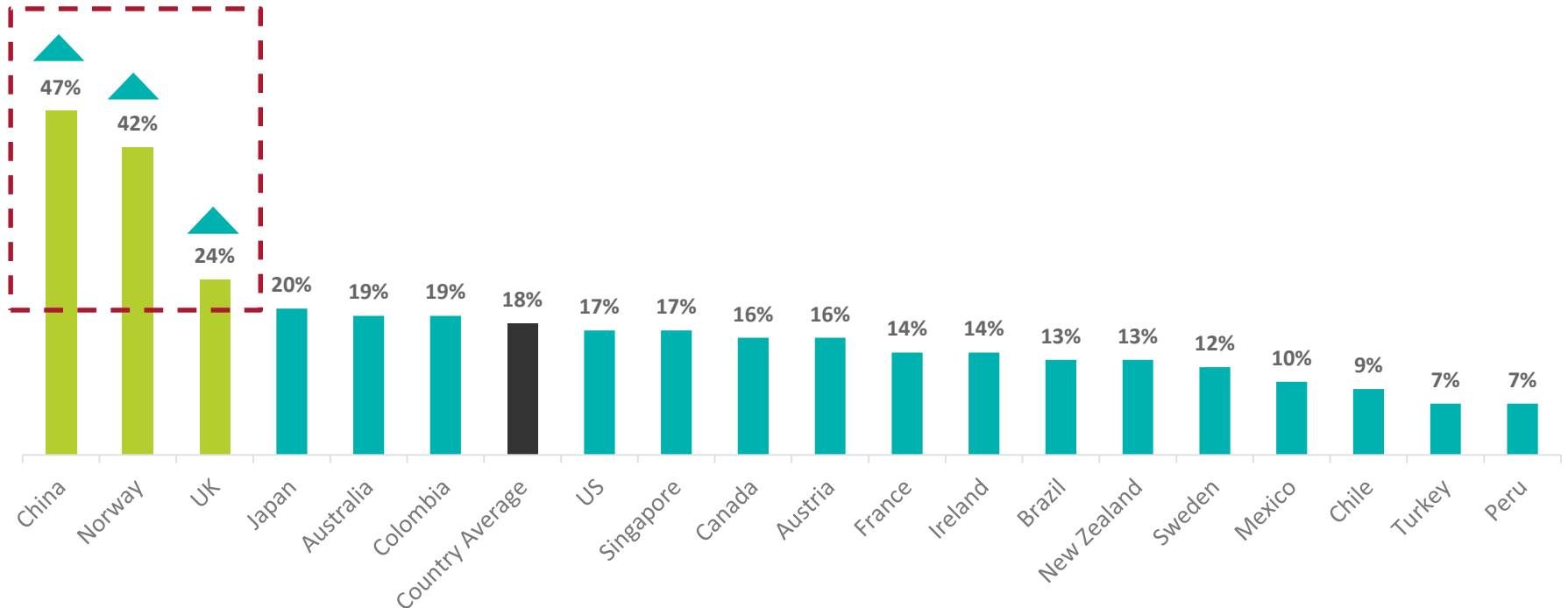
▲ ▼ Significantly higher/lower. Tested at 95% confidence interval



At 47%, China has the highest adoption of mobile wallets, followed by Norway and the UK.

Q13. How have you paid for the products or services you bought via your smartphone/tablet in the past six months? Please select all that apply.

Mobile Wallet Usage Market Overview

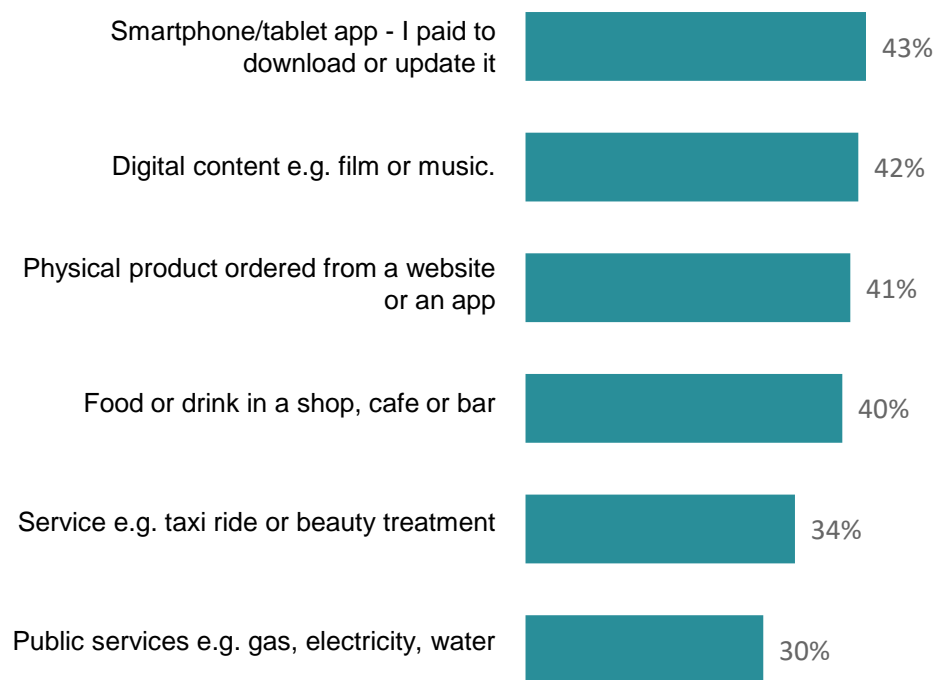


Mobile wallet payments are used for a range of products and services – digital and physical.

Q18. You said that you had used a mobile wallet to purchase items or services via your smartphone or tablet. What products or services did you purchase using this payment method? Select all that apply.

Regional Breakdown.

Mobile Wallet Users in All Participating Countries' Average



Europe	North America	South America	APAC
43%	46%	39%	44%
48%	36%	44%	36%
39%	41%	38%	45%
32%	49%	27%	52%
30%	35%	27%	41%
26%	26%	34%	35%

Mobile wallet users are frequently engaging and investing more in mobile commerce activities, a driving force behind mobile commerce growth.

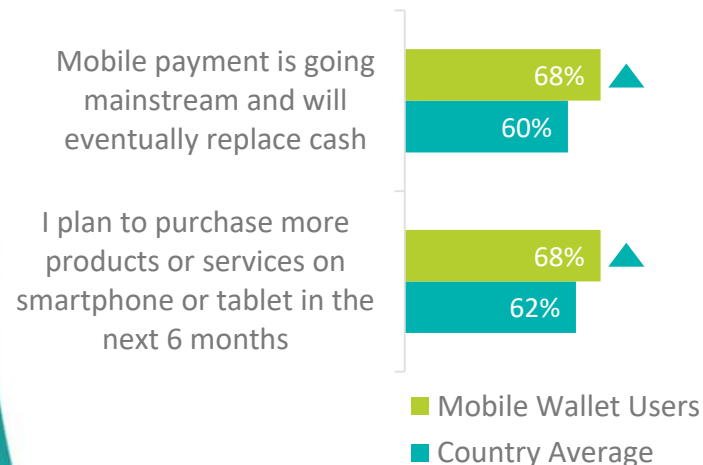
Those who have used a Mobile Wallet

36% purchase products or services on mobile **Weekly or more**
(Versus 23% Country Average)

86% are **Extremely/Somewhat Satisfied** with their mobile purchase experience (Versus 80% Country Average)

At **60%**, convenience is their biggest **purchase motivator**
(Versus 49% Country Average)

They feel **more positive** about mobile purchases and mobile payments



82% have **Interacted with** an **mobile ad** (Versus 76% Country Average)



Base: Mobile wallet users in all participating countries (665)

▲ ▼ Significantly higher/lower. Tested at 95% confidence interval





Thank you!



The illustration shows a central tablet displaying a website with three stars. To its left is a smartphone showing a date '25 Wednesday June 2015'. To its right is another smartphone showing 'Q15'. Further right is a third smartphone showing a star. Above the tablet are two large green location pins; the left one contains a bar chart, and the right one contains a pie chart.

IAB

Maggie Zhang, Ph.D. | Sr. Director Maggie.zhang@iab.com

IAB

Alexandra Salomon | Sr. Director Alexandra@iab.com



About IAB

The Interactive Advertising Bureau (IAB) empowers the media and marketing industries to thrive in the digital economy. It is comprised of more than 650 leading media and technology companies that are responsible for selling, delivering, and optimizing digital advertising or marketing campaigns. Together, they account for 86 percent of online advertising in the United States. Working with its member companies, the IAB develops technical standards and best practices and fields critical research on interactive advertising, while also educating brands, agencies, and the wider business community on the importance of digital marketing. The organization is committed to professional development and elevating the knowledge, skills, expertise, and diversity of the workforce across the industry. Through the work of its public policy office in Washington, D.C., the IAB advocates for its members and promotes the value of the interactive advertising industry to legislators and policymakers. There are licensed IABs in 43 nations around the world and one regional IAB in Europe. Founded in 1996, the IAB is headquartered in New York City and has a West Coast office in San Francisco.

