Adobe Scene7 Mobile Commerce Survey: Mobile Shopper Insights for 2011

February 2011

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Contents

Executive Summary

As consumers use multiple channels to research, browse and shop, mobile is poised to become an important entry point in the cross-channel shopping experience.

In stores, shoppers are reaching for their mobile devices to research products and prices at the point of decision. Curious consumers are scanning QR codes on outdoor advertising and in magazine pages to get more information about a brand or product. As the impulse strikes them, many shoppers are simply moved to purchase directly from their devices. In fact, recent research finds that U.S. mobile Internet users expect to engage in shopping-related activities in some categories at rates that exceed current rates on desktops.[1]

However you look at it, mobile is transforming the way consumers shop and interact with brands, and retailers that are not investing in this channel may risk getting left behind. This year, U.S. mobile commerce revenues are expected to hit $5.3 billion, up 83% from a year ago, according to Barclays Capital, while a Luth Research study found that 51% of consumers are more likely to purchase from retailers that have mobile-optimized websites. And over the 2010 holiday shopping season, mobile Google searches for stores, products and prices were up more than 200% from the previous year, according to the company, and the mobile bar code scanning app ShopSavvy was downloaded 2.2 million times in November.[2]

It is clear that consumers enter the shopping experience well-armed today with their smart, connected devices. The good news for merchants is that mobile offers many touch points through which they can engage their customers, with research suggesting that mobile optimized websites can raise engagement by as much as 85%.[3] The key is to build a user experience at each touch point that is relevant and engaging so as to inspire deeper interaction.

This report, the second installment based on key findings from our survey of 1,200 consumers, examines specific mobile shopping preferences that have implications for how retailers design the mobile user experience. This quantitative study measures the user characteristics, behavior, preferences, satisfaction levels and other experiential factors related to the shopping and purchasing of tangible goods from mobile devices. For user experience comparisons between shopping and other key consumer sectors, please see this report's forerunner, *Adobe Mobile Experience Survey: What Users Want from Media, Finance, Travel and Shopping*.

The survey participants reflect a wide range of age groups and mobile device ownership; their responses were analyzed for gender, age and device differences.

Key Findings

Mobile Commerce Adoption

- A majority of the respondents (62%) say they have purchased physical goods from their devices in the last six months.[4]
- The greatest number of respondents (45%) spent $249 or less over the last 12 months; by comparison, the average annual online spend per shopper in 2010 is estimated at $1,139.[5]
- Of those who have purchased from their mobile devices, a majority report spending more than an hour a week mobile shopping, on both mobile shopping websites and downloadable apps.
- Compared to their peers, iPhone users, men and 30-49 year olds purchase more frequently, buy goods in more categories and generally spend more time shopping than their peers.
- When it comes to dollars spent, proportionally more iPhone users (66%) report spending $250 or more on mobile purchases in the last 12 months compared to their peers, followed by Blackberry users (58%).
- The most purchased consumer goods category is shrink-wrapped entertainment, including Movies, Music and Games, purchased by 43% of the respondents, followed by Clothing, Shoes and Jewelry, purchased by 30% of the respondents. Closely behind are Electronics and Books, Magazines and Newspapers, purchased by 28% and 26% of the respondents, respectively.

1 The Nielsen Company and Yahoo!, *The Mobile Shopping Framework Study: The Role of Mobile Devices in the Shopping Process*, Jan. 2011
2 eMarketer, *Mobile Ecommerce Investments to Pay Off in 2011*, Jan. 2011
3 Luth Research, *Supply & Demand of the Mobile Web for Retail*, Nov. 2010
4 The respondents' mobile commerce adoption rate is significantly higher than current estimates for the broad population, thanks to their duly high browser-enabled smartphone adoption compared to the general population.
5 eMarketer, *U.S. Retail E-Commerce Forecast: Room to Grow*, March 2010

User Experience

- Respondents appear satisfied with their mobile shopping experience overall, with more than 80% rating their experience above average.
- Downloadable mobile apps are not drawing higher satisfaction scores than mobile browsers, despite the former's reputation for superior user experiences.
- For a wide range of mobile shopping activities such as researching products and comparing prices, the majority of respondents favor using browsers to downloadable mobile apps. Two-thirds of the respondents say they prefer browsers to apps for accessing product and other shopping content.

Shopping & Browsing Preferences

- Features rated most important by a majority of mobile shoppers are easy checkout (57%) and product and pricing information (53%). Visual information, such as full-screen product view, ranks as the next most important feature (42%), followed closely by simple keyword search (40%).
- When it comes to visual tools, the greatest number of respondents (54%) identified 360-degree spin as the visual feature that would influence their likelihood of purchase on a mobile website. The next two top-ranked visual features are side-by-side product comparisons (49%) and interactive zoom/pan (44%). Interestingly, respondents ranked these features ahead of simple keyword search and customer ratings & reviews.
- Full-screen image zoom with "next/previous" touchscreen buttons to navigate left/right was tied with full-screen horizontal scrolling with dragging or flicking images left/right as the most preferred ways to browse multiple products. Both of these viewing experiences were selected by nearly half of the respondents.
- Females appear to have higher expectations for mobile shopping features. For example, easy checkout was rated important by 61% of females compared to 51% of males; 44% of females rated search important compared to 36% of males.
- Video is one area that was rated by more men than women (38% versus 28%) as an influence on their likelihood of purchase. Women also place a greater premium on visual features including color-swatching, mix-and-match and alternative images (such as on-model, lifestyle images) than men.
- More females than males (42% versus 35%) deem online promotions and coupons important to their mobile shopping experience.
- 18-29 year-olds prefer the following features more than other age segments: visual information, social sharing and sorting/filtering options to narrow search results.

Conclusions and Recommendations

For retailers, mobile can be a highly personal and influential customer touch point. Its unparalleled immediacy means that consumers can turn to their devices to realize a need or desire as the impulse strikes them, whether it's hitting up the nearest store upon receiving a coupon, or looking up user reviews to validate a decision to purchase. It's therefore important to think of mobile not strictly as a purchase channel, but as a touch point for engaging shoppers, driving them to action and serving them when they are ready to buy.

User expectations and preferences vary by region and country, so please note that our survey findings are based on U.S. consumer responses. With that in mind and based on our findings, we offer these considerations and recommendations for planning and executing your mobile shopping presence:

Mobile shopping and commerce is a reality: Invest in mobile and be ready for your shoppers

Thanks to their ability to deliver desktop-like experiences that are rich in content and functionality, browser-enabled smartphones are spurring major shifts in shopping behavior. As mobile and desktop experiences converge, it is not a big leap for consumers to purchase goods through rich websites and apps accessed from their mobile devices.

Our study validates the growing adoption of mobile commerce: That easy checkout was singled out as the most important mobile shopping feature suggests that consumers expect to be purchasing products on the go. Moreover, they are not averse to purchasing products in high-touch categories like clothing, shoes, electronics and toys. As mobile becomes an important purchase channel, online retailers—including those selling high-ticket, discretionary goods—should consider integrating online commerce into their mobility roadmap.

Where possible, businesses should utilize existing investments, tools, technologies and applicable know-how from their desktop delivery approaches to develop mobile-optimized experiences.

As consumers treat their smartphones like minicomputers, marketers need to deliver rich and relevant experiences to engage them, applying best practices from their desktop delivery arsenal where it makes sense. With the greatest number of respondents naming 360-degree product spin as the visual feature most likely to influence purchase, it's a sign that consumers are transferring their desktop expectations and preferences to mobile. Quite simply, users want ample visual information regardless of the medium, and just as is true for the desktop, bigger is also better in mobile. For instance, the common denominator between the two most preferred experiences for browsing multiple products is full-screen views.

Regardless of whether the product images appear in an app or mobile website, mobile-optimized, full-screen displays and zoom are de rigeur. These tactics play well into the trend towards ever-larger form factors, including bigger displays.

Interestingly, retailers appear to be tuned into what mobile shoppers want. We surveyed online retailers in July 2010, and questioned them about their planned and deployed tactics. A majority said they expect shoppers to use full-screen viewing to browse their merchandise, in line with what our consumer respondents indicated as a key browsing feature. The no. 1 visualization feature our merchant respondents wanted to deploy was 360-degree spin; similarly, this was the feature cited by the most shoppers as being influential to their purchase decision.

Mobile is fragmented: To maximize reach, invest in a mobile-optimized web experience.

The proliferation of mobile devices and operating systems has made for a highly fragmented industry, challenging retailers who seek scale and reach using rich delivery channels. The mobile web can mitigate some of these challenges, especially as growing numbers of users adopt browser-enabled smartphones.

For most retailers, mobile-optimized websites will make the most sense, not least because users tell us they prefer browsers over downloadable apps for interacting with shopping-related content.

We believe users like the convenience of simply typing their search queries and destinations right into the browser, compared to searching for applications, then downloading them from an app store. In many ways, consumers are simply transferring their desktop behavior to the mobile browsing and search environment which, for browser-enabled devices, replicate the familiar desktop experience. In those environments, users will instinctively access the browser, which is universally considered the de facto application for online search.

Additionally, developing and maintaining apps for multiple platforms can be costly and most consumers have limited appetite for the number of applications they are willing to download and maintain on their devices.

On the technology front, as HTML5 and Flash continue to evolve, browser-based experiences will come to be richer in content and functionality, with the potential to emulate or approach the native app experience. Key features offered by branded retail apps such as store locator with map integration, in-stock product search by store, order-tracking, customer reviews and more can all be executed on the mobile web today.

That said, a hybrid approach that delivers both web and app experiences can nonetheless be ideal if resources were not a constraint. Retailers interested in delivering branded utilities and services to their base can provide those experiences through downloadable apps. Among retailers deploying both, Columbia Sportswear, for instance, has a mobile-optimized site and a well-reviewed app that instructs adventurers how to tie 70 different knots to meet their outdoor needs.

Finally, with mobile devices rapidly expanding beyond cell phones to include all wirelessly connected devices such as e-readers, tablets, and portable gaming handhelds, device fragmentation will increase. Each device, with its own specific features and capabilities, will require a distinct, nuanced approach. Rather than launching for several devices and platforms at once, choose one that best captures your demographic, then expand to other devices and platforms.

Offer swift, streamlined, yet rich experiences.

With mobile users having different needs than desktop users, the key is to make it easy for shoppers on the go to interact with your brand and products, while being mindful of load times and bandwidth issues. This means minimal navigation and clean graphical interfaces free of clutter and optimized for touch-screen interactions with larger buttons and text. So, calling up a zoom view, for example, shouldn't involve a lot of pinching and gesturing. Instead, a simple tap on a button should produce an optimized, full-screen view or close-up details of the product.

One approach shared by many mass merchants is a focus on efficient search and browsing. Their mobile home page reflects a minimalist sensibility that invites deeper browsing and exploration. Only when shoppers drill down on categories or products do detailed information appear.

An uncluttered shopping environment, however, should not preclude access to rich visual tools that emulate the in-store touch-and-feel experience. Our findings show that the younger age group is more predisposed to wanting and using visualization tools and shopping features than their older peers. At a time when those under 10 years old are owners and users of the iPod Touch, a whole generation of consumers are growing up on mobile and leapfrogging the PC experience in their early years. Thus, retailers have to deliver on mobile experiences that engage and build trust, whether it's providing rich visuals such as high-quality product imagery with deep details or robust search and product comparison tools.

The mobile channel continues to evolve. Monitor user satisfaction and expectations continuously to deliver on a great mobile shopping experience.

Mobile shopping is still in its early days and will continue to evolve with the technology and user expectations.

While our findings show that mobile shopping behavior tends to vary by gender, age and device, many of these differences should narrow as mobile usage becomes more pervasive. Today, men, 30-49 year olds and iPhone users appear to shop more than their peers, likely because they are the typical early adopters. These segments are more likely to engage in mobile shopping because their advanced browser-equipped touch-screen devices make for a compelling mobile shopping experience. But forecasters are predicting a continuing fast uptake in smartphone adoption, buttressed by projections by the Nielsen Co. that 1 in 2 Americans will own a smartphone by the end of 2011.[6] Against this backdrop, we expect women, in particular, to catch up—and even outpace— men in their adoption of mobile shopping and commerce, mirroring their trajectory on the PC Internet, where they now account for proportionally more ecommerce dollars than men.

Meanwhile, the user experience will also continue to improve as fierce competition in the mobile ecosystem among device makers, service providers and other players will inevitably lead to greater innovations. Retailers should stay abreast of the advances in this space while diligently monitoring mobile behavior, satisfaction and expectations in order to continuously fine-tune their tactics and strategies.

Today, consumer expectations generally lag the technology, which in turn represents an opportunity for retailers to trial and learn. Our study provides one proof point that mobile's smaller form factors are not deterring consumers from interacting with shopping content, and in fact, they appear to be quite satisfied with their overall experience. This provides a solid footing from which retailers can further improve and deliver on richer and engaging mobile shopping experiences.

Methodology & Participants

On Adobe's behalf, Keynote Services conducted the online survey distributed to 1,200 adults in the U.S. between August 25 and 30.

Of the 1,200 U.S. consumers surveyed, 739 say they have purchased goods from their mobile devices in the last six months. Unless otherwise noted, most of the findings in this report are based on responses from this respondent pool.

The 739 participants skew female and young, and over-index on browser-enabled smartphone adoption, reflecting the characteristics of the 1,200 original population pool.

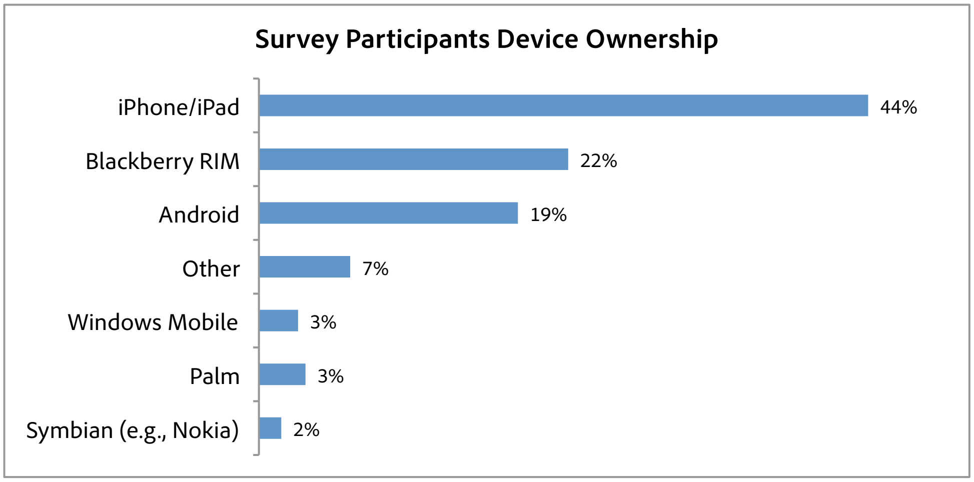
iPhones/iPads represent the most common device among those survey participants who have engaged in mobile commerce and is used by 44% of them. Android and Blackberry claim 19% and 22%, respectively, of the participants' devices. While iPhones/iPads appear to be the device of choice, proportionally more men than women owned them.

There are only 54 respondents in the age group between 50 to 64 years old, making for an insufficient sample size from which to draw statistically significant conclusions.

6The Nielsen Company, *Smartphones to Overtake Feature Phones in U.S. by 2011*, March 2010.

Any references to mobile purchases made in the last 12 months should be interpreted as mobile purchases made in the last 12 months from August 2010 when the respondents were surveyed.

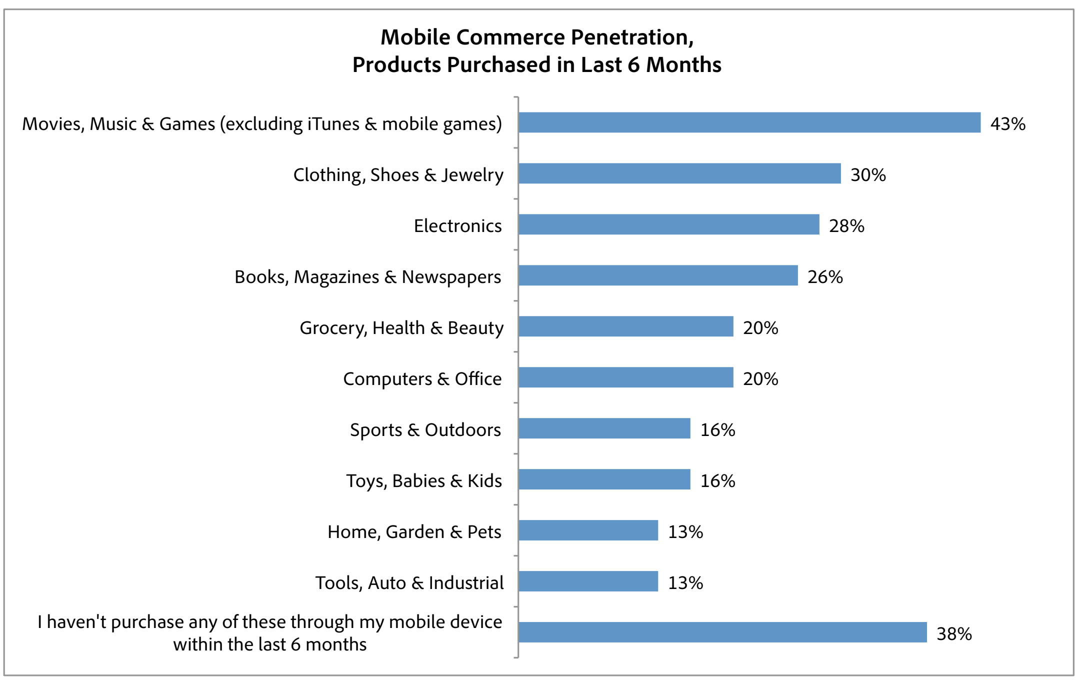
For survey participant details, please see Appendix 1.



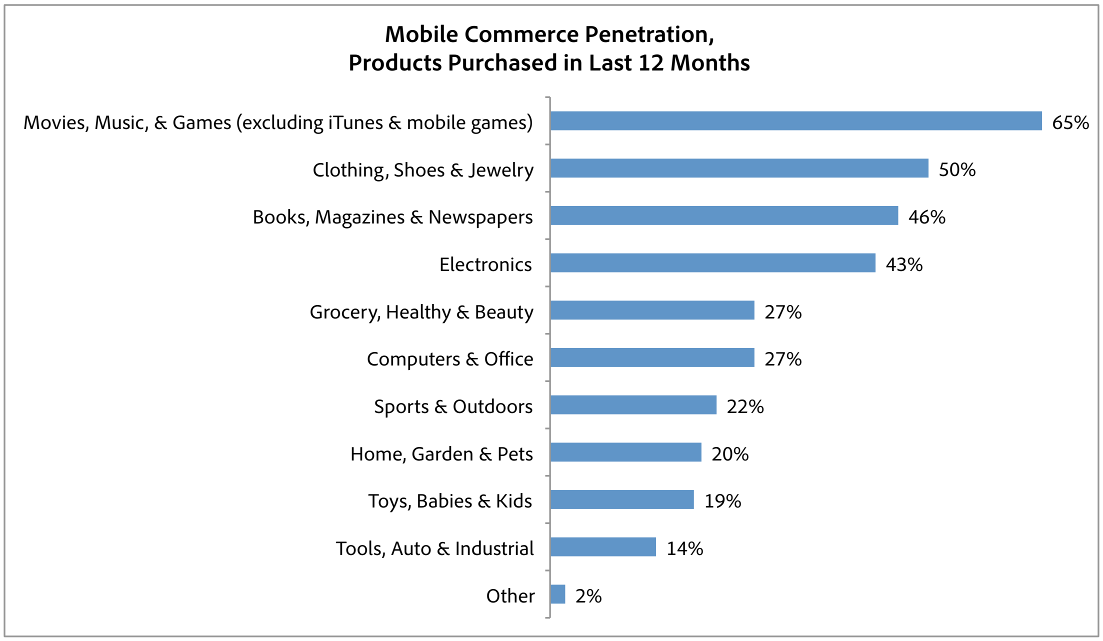
Results & Analysis

Consumers are using their mobile devices to shop and purchase. How pervasive is mobile commerce? What are they buying and spending? Who are mobile shoppers?
A majority of the respondents have purchased from their mobile devices, with shrink-wrapped entertainment topping the list of most purchase categories.

- Of the 1,200 consumers surveyed, 62% have purchased from their mobile devices and made purchases in 3.5 categories on average. These adoption rates are significantly higher than what we would see for the population as a whole, due to the pervasive adoption of browser-enabled smartphones among our panelists.

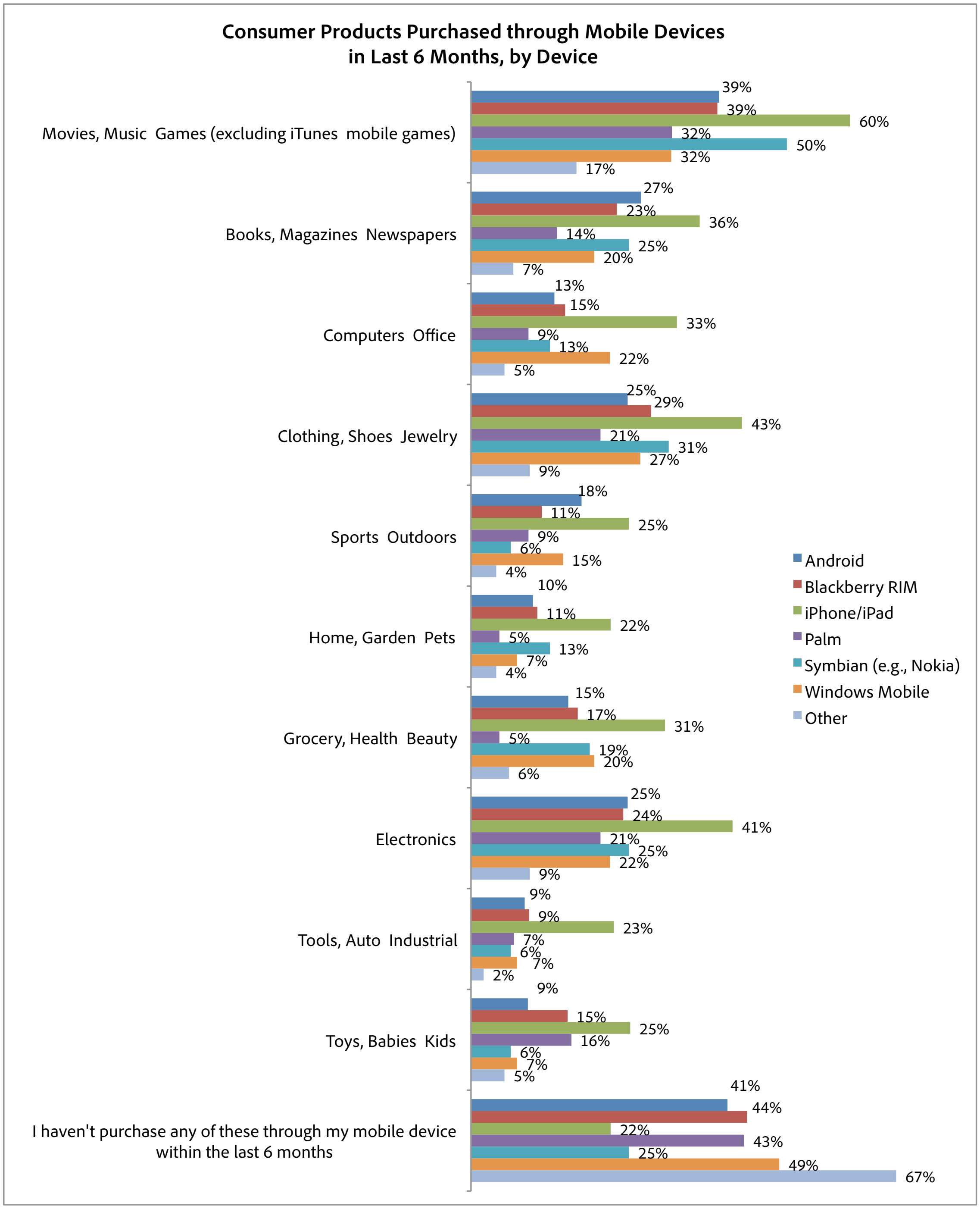


- Those who indicated they have purchased in the last six months (739 respondents) were then asked what products they purchased in the last 12 months; an "Other" category was also added a choice they could select.
- Of those who have purchased goods from their devices, shrink-wrapped entertainment, including Movies, Music and Games, was purchased by 65% in the last 12 months. The next two most purchased categories are Clothing, Shoes & Jewelry, purchased by 50% of the respondents, closely followed by Books, Magazines and Newspapers, purchased by 46%.

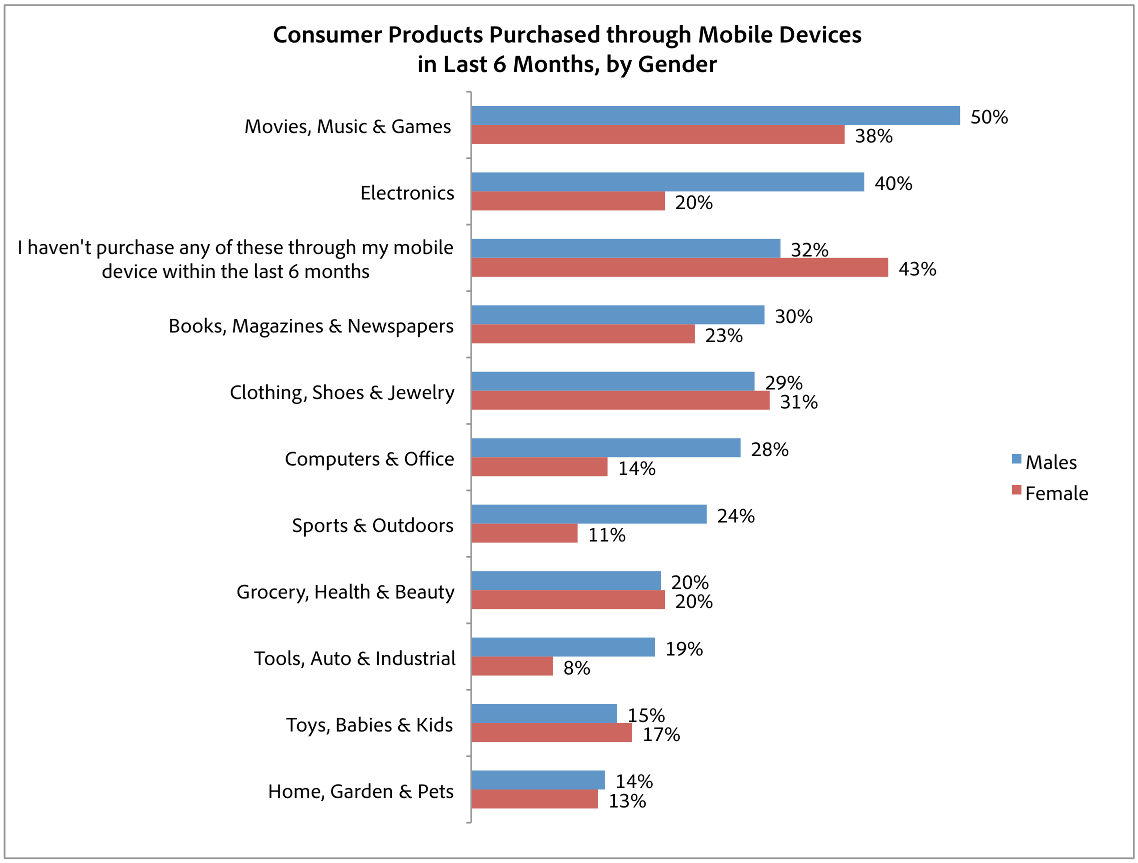


IPhone users, men and 30-49 year olds make purchases in more categories compared to their peers.

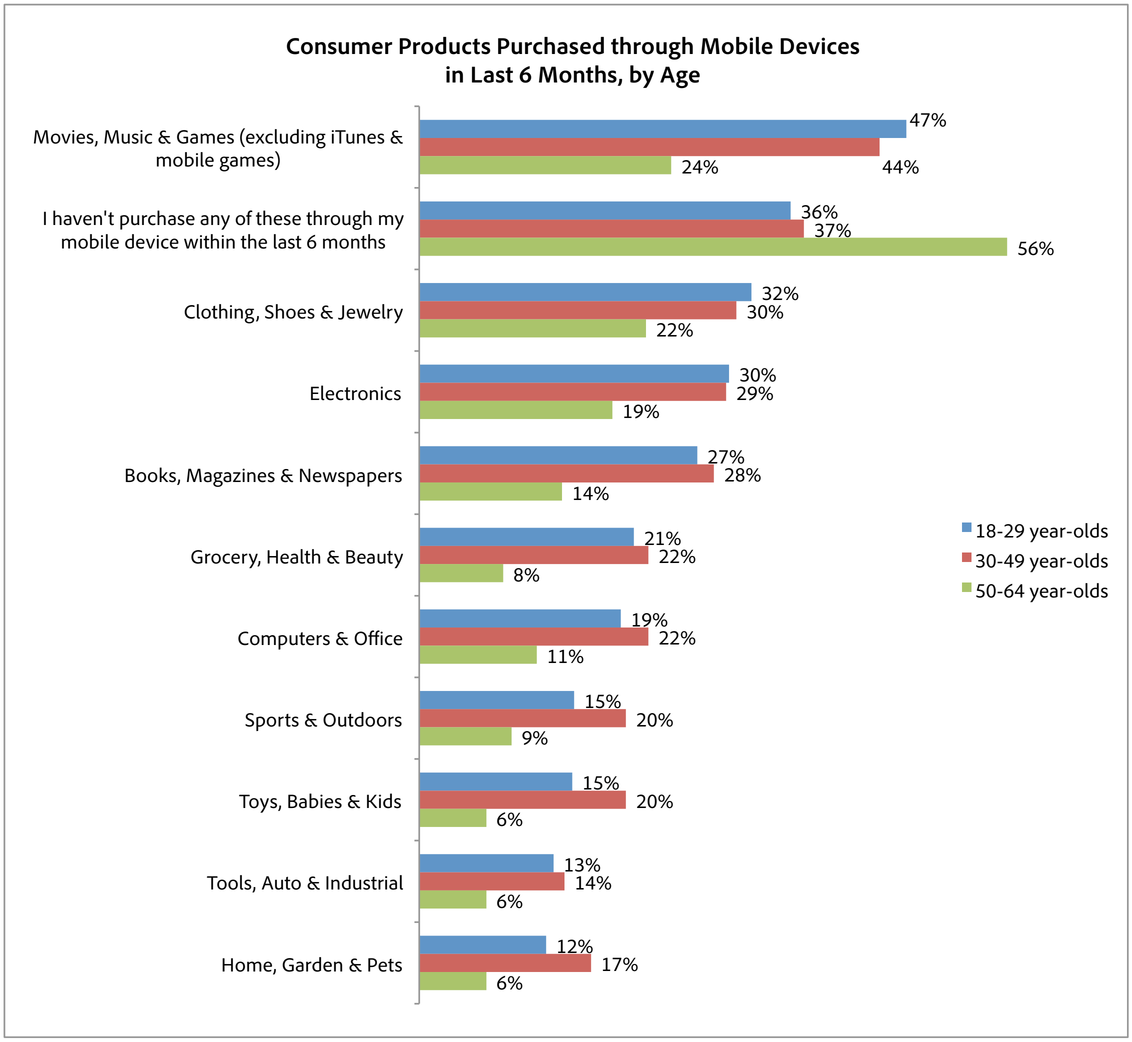
- Compared to other device users, more iPhone users have purchased from their devices; they also lead every purchase category measured.



- A higher percentage of men have purchased from their mobile devices than women: 43% of women say they have not purchased from their devices in the last six months compared to 32% of men who say so. Men lead purchases in six of the ten product categories measured, except for these categories, purchased by equal numbers of men and women: 1) Grocery, Health & Beauty; 2) Toys, Babies & Kids; 3) Clothing, Shoes & Jewelry; and 4) Home, Garden & Pets.



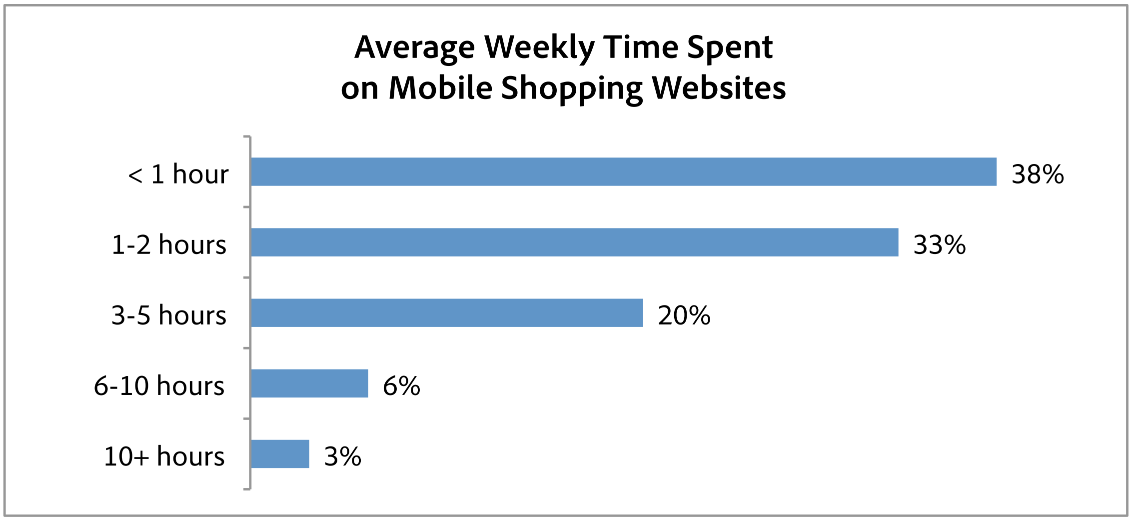
- 18-29 year-olds and 30-49 year olds buy goods across all categories in near equal numbers, though 30-49 year olds have a slightly greater tendency to purchase in these categories: 1) Home, Garden & Pets; 2) Sports & Outdoors; and 3) Toys, Babies & Kids.

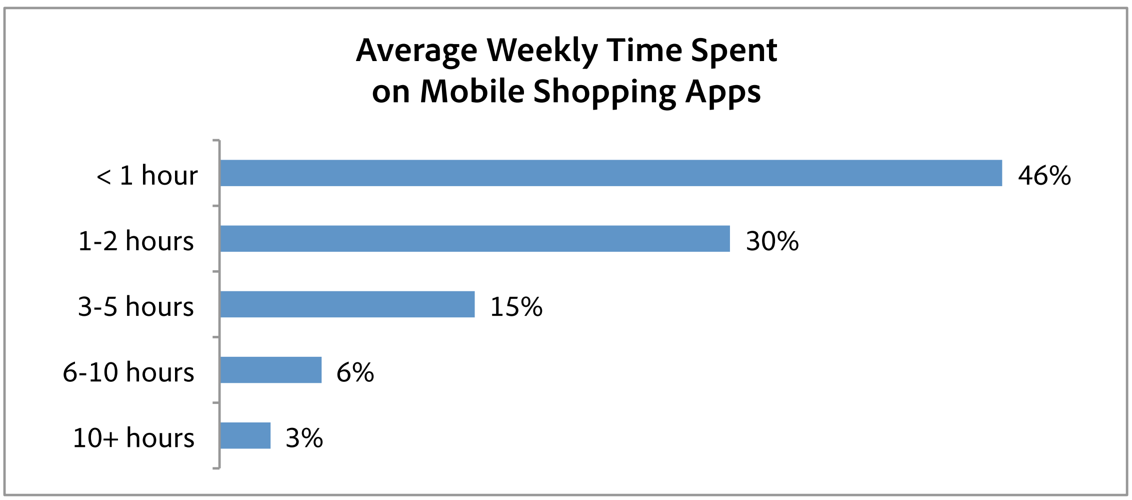


Please note that the 50-64 year-old age group constitutes an insufficient sample size from which to draw statistically significant conclusions.

A majority of respondents report spending more than an hour a week shopping from their devices, with 30-49 year olds, men and iPhone users generally spending more time mobile shopping than their peers.

- More than half of the respondents report spending at least an hour a week shopping on mobile websites or downloadable apps. To put this in context, Americans spend an average of 2.7 hours per day on the mobile Internet— which translates to 19 hours a week—according to a 2010 study by PR agency Ruder Finn.



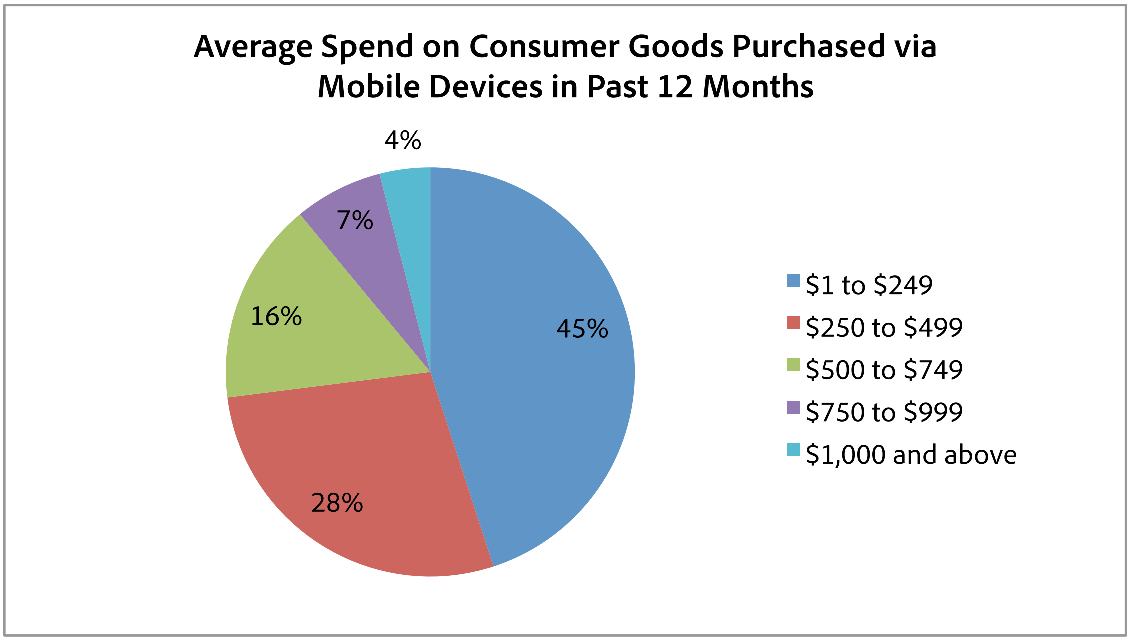


- 30-49 year olds consistently spend more time shopping than their peers, on both websites and downloadable apps.
- Proportionally more iPhone users (62%) spend over an hour a week on shopping apps compared to their peers, with Palm users ranking second with 53% of them spending more than an hour a week on shopping apps. When it comes to those spending more than an hour a week on mobile shopping sites, iPhone and Palm users are about tied for first place.
- Men spend more time on mobile shopping sites than women, while both groups spend more than an hour a week on mobile shopping apps in nearly equal numbers.

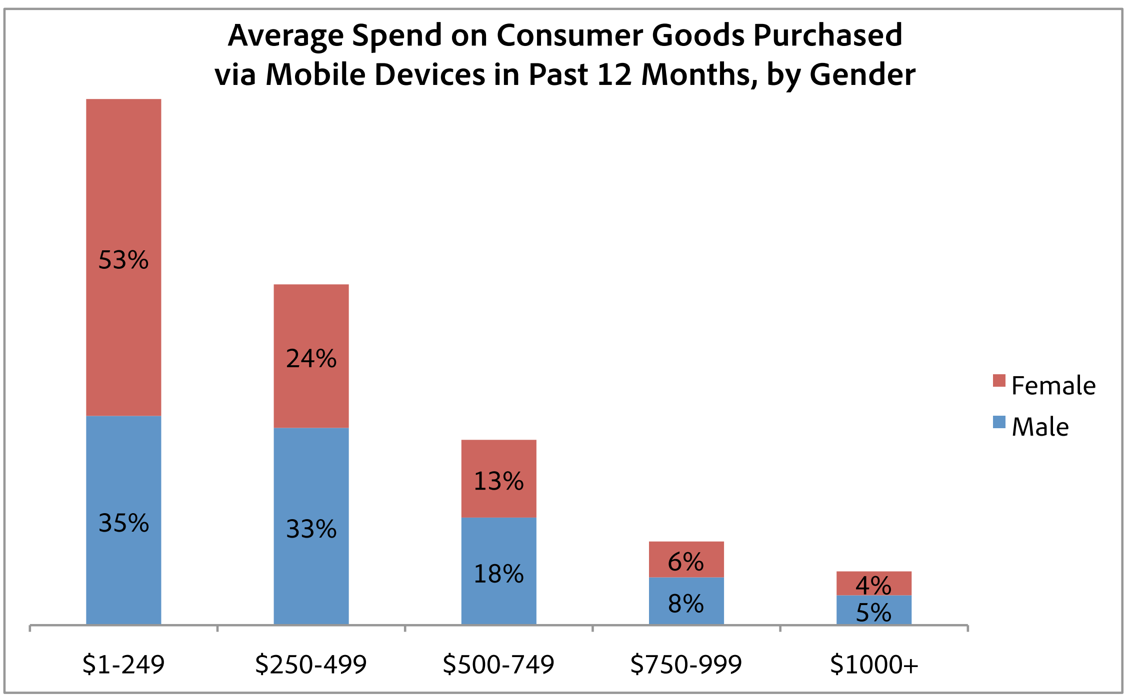
For details on how the amount of time users spend on mobile shopping varies with age, gender and device ownership, please see Appendix 2.

A majority of respondents report spending more than $249 on average on goods purchased, with greater proportions of iPhone users, men and 30-49 year olds among them.

- Fully 55% of the respondents report spending more than an average of $249 on goods purchased through their mobile devices in the last 12 months, with men, older adults and iPhone users likely to spend more than their peers.



- More than 60% of male respondents report spending more than an average of $249 on consumer goods in the last 12 months, compared to 47% of females.



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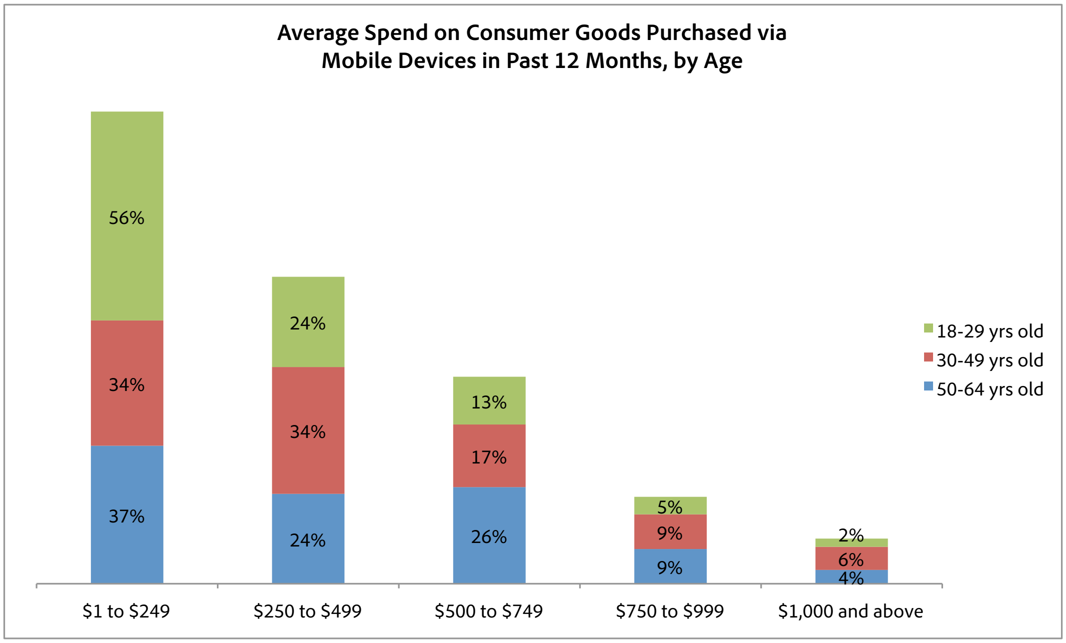
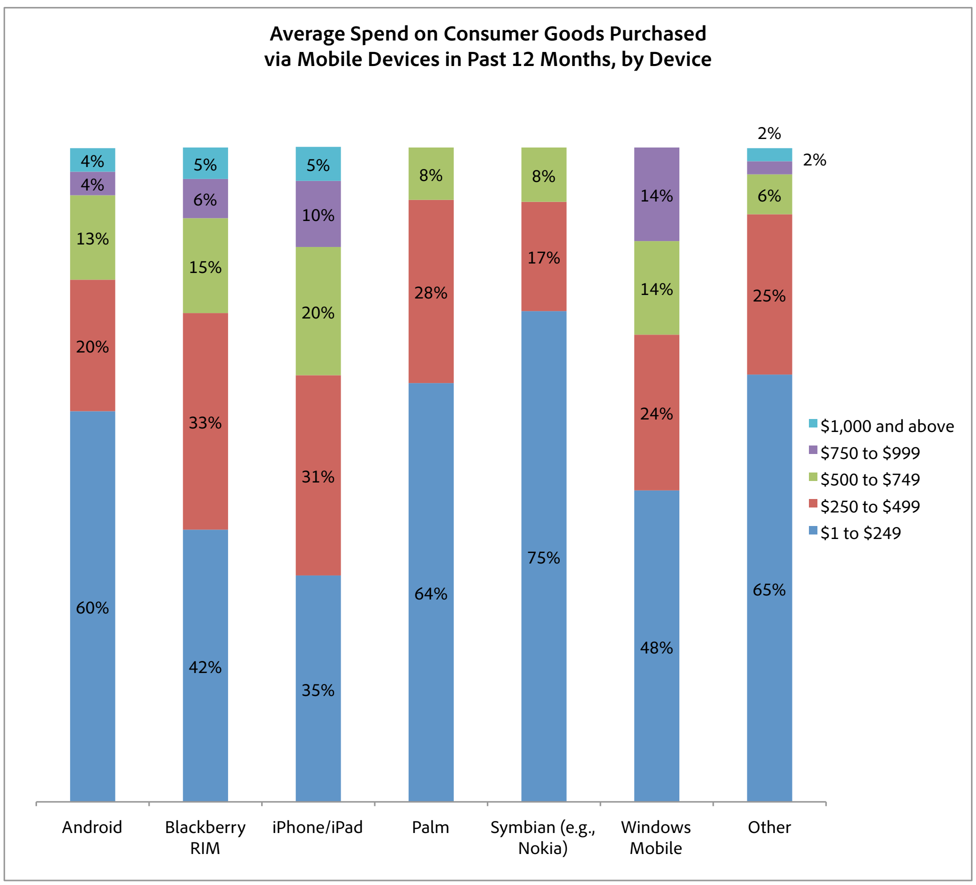
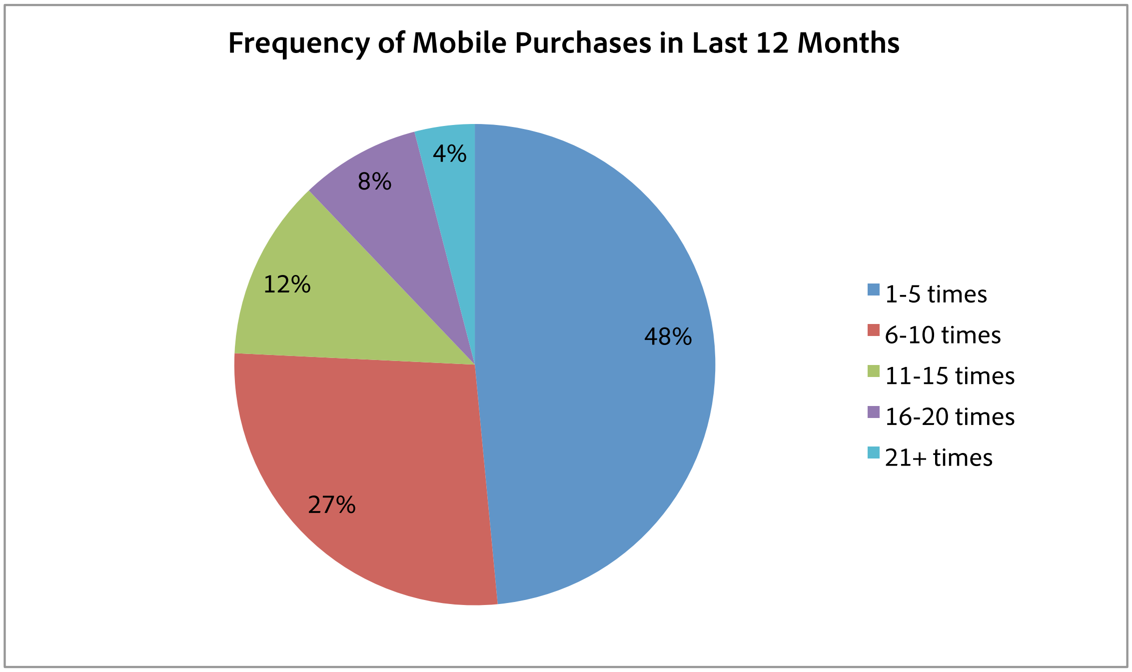


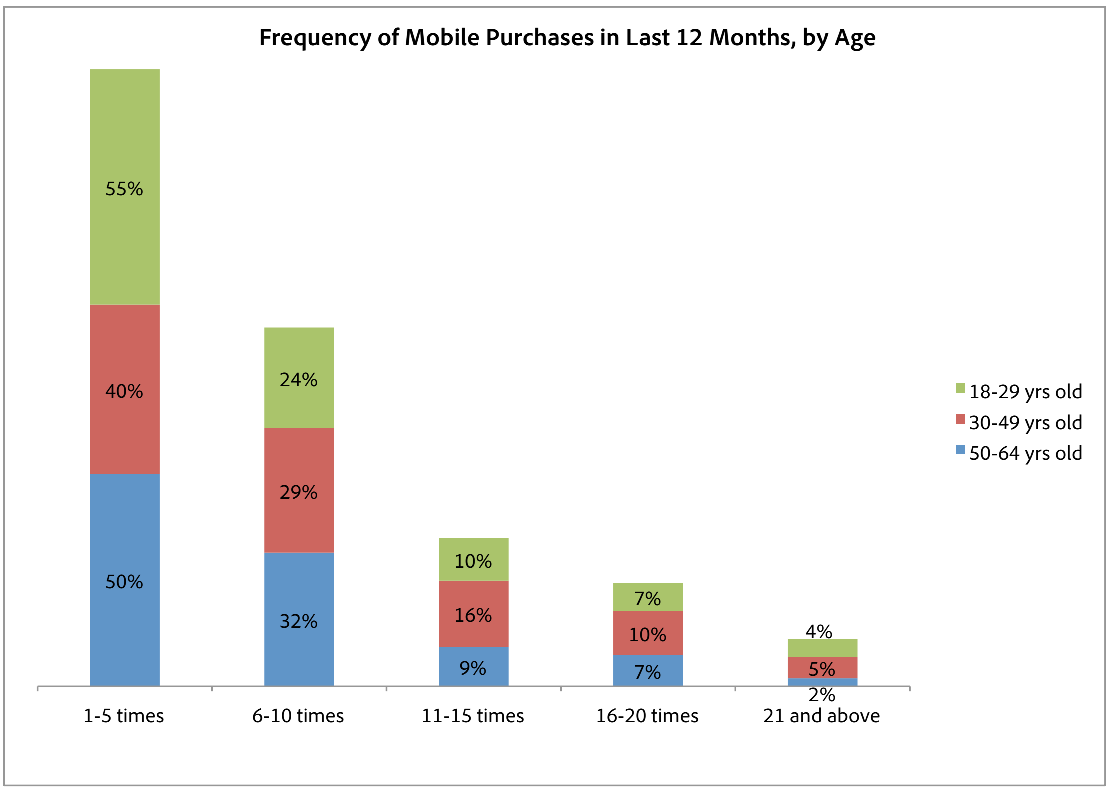
- About 65% of iPhone owners and 30-49 year olds both report spending more than $249 on average in goods purchased through their devices in the last 12 months, the highest percentages in their respective segments.



A slim majority of respondents report making more than five purchases in the last 12 months; they are more likely to be iPhone users, men and 30 to 49 year-olds.

- 48% made between one to five purchases in the last 12 months; the rest made more than five purchases in that period.
- Men purchase more frequently than women; similarly, iPhone users and 30 to 49 year-olds purchase more frequently than their peers.





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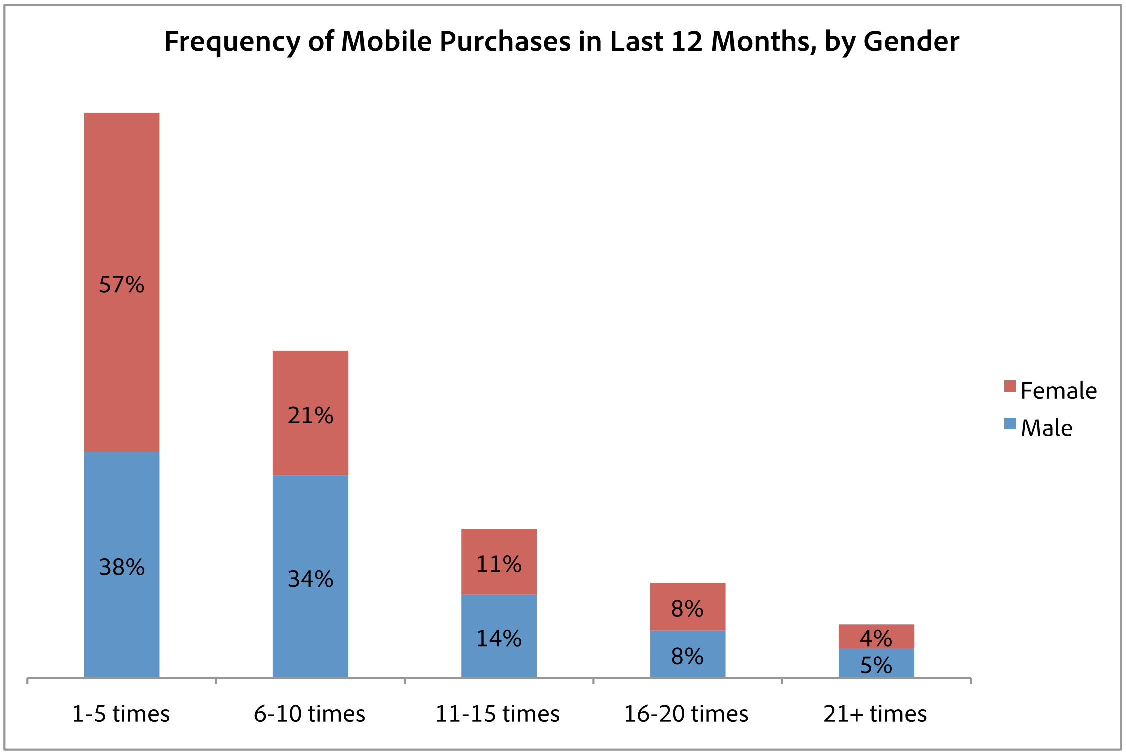
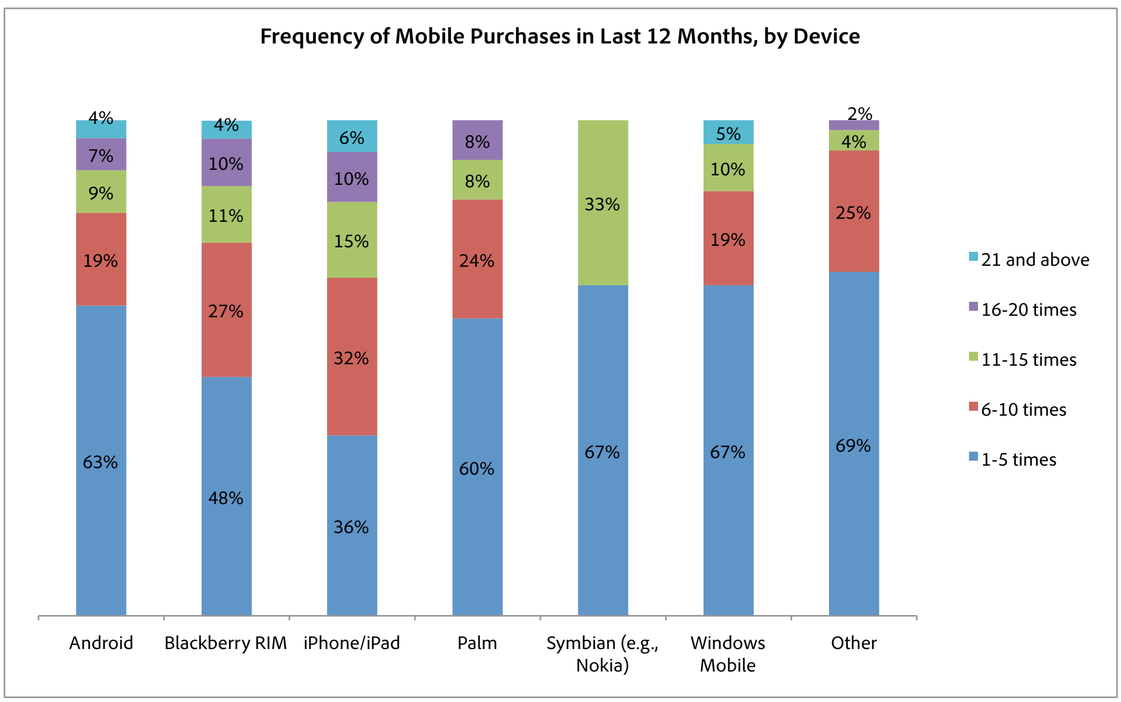
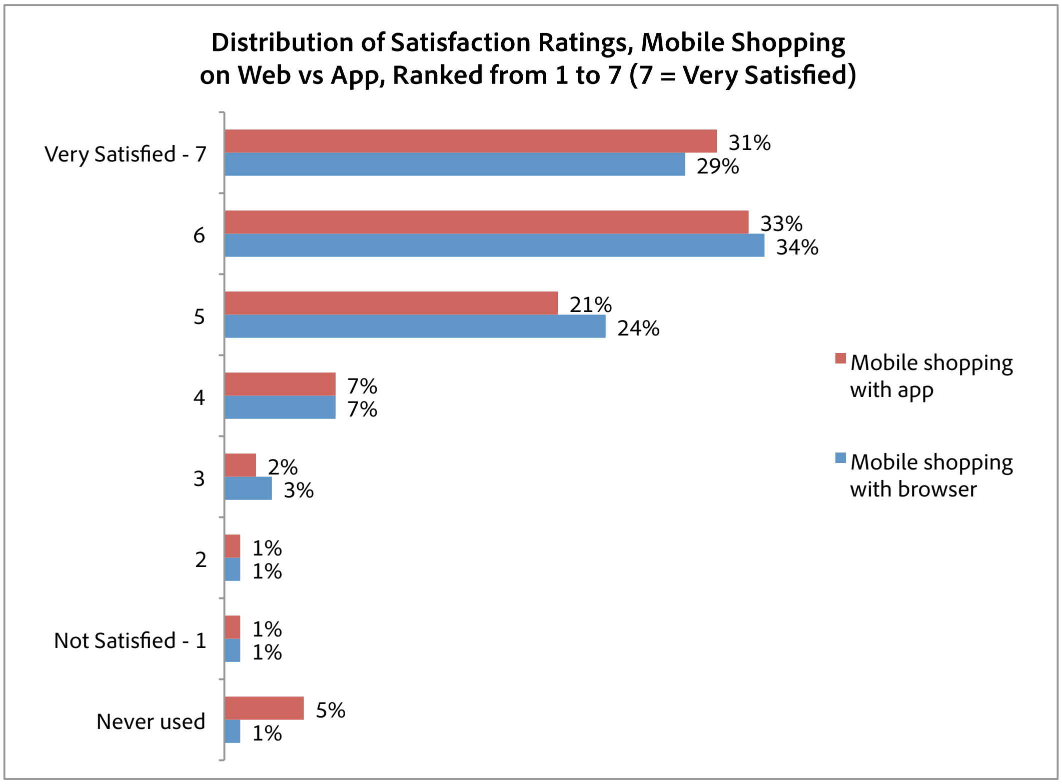




How satisfied are consumers with the mobile shopping experience?

Users appear satisfied with their mobile shopping experience, both on mobile websites and downloadable apps.

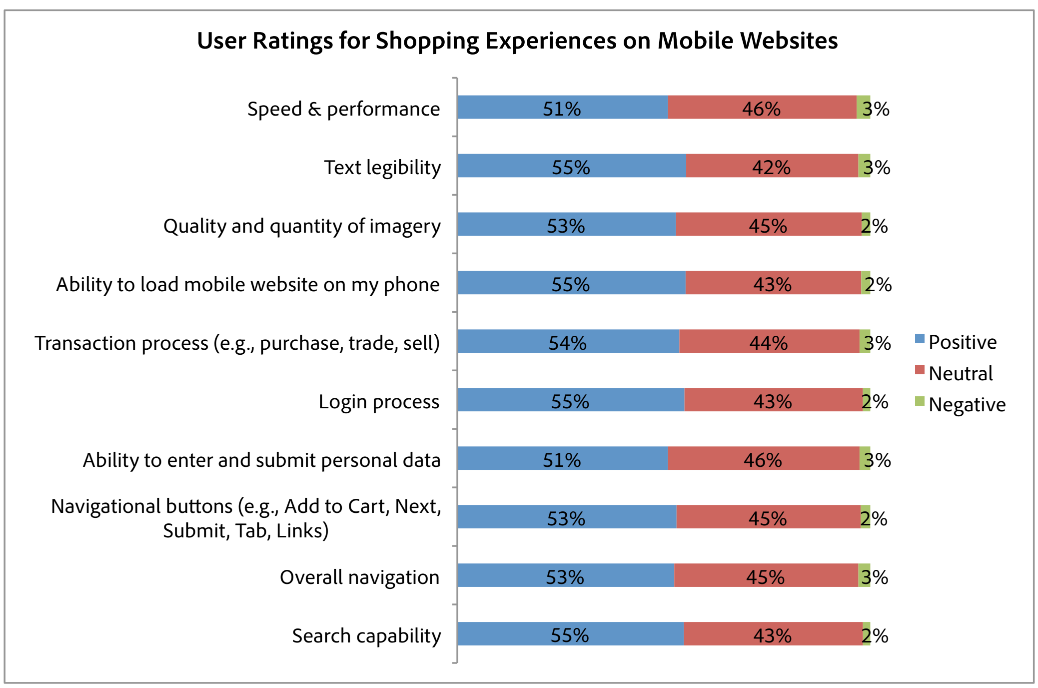
- When asked to rate their browser and app experiences, an overwhelming majority scored them above 4 on a scale of 1 to 7, with 7 being "very satisfied."

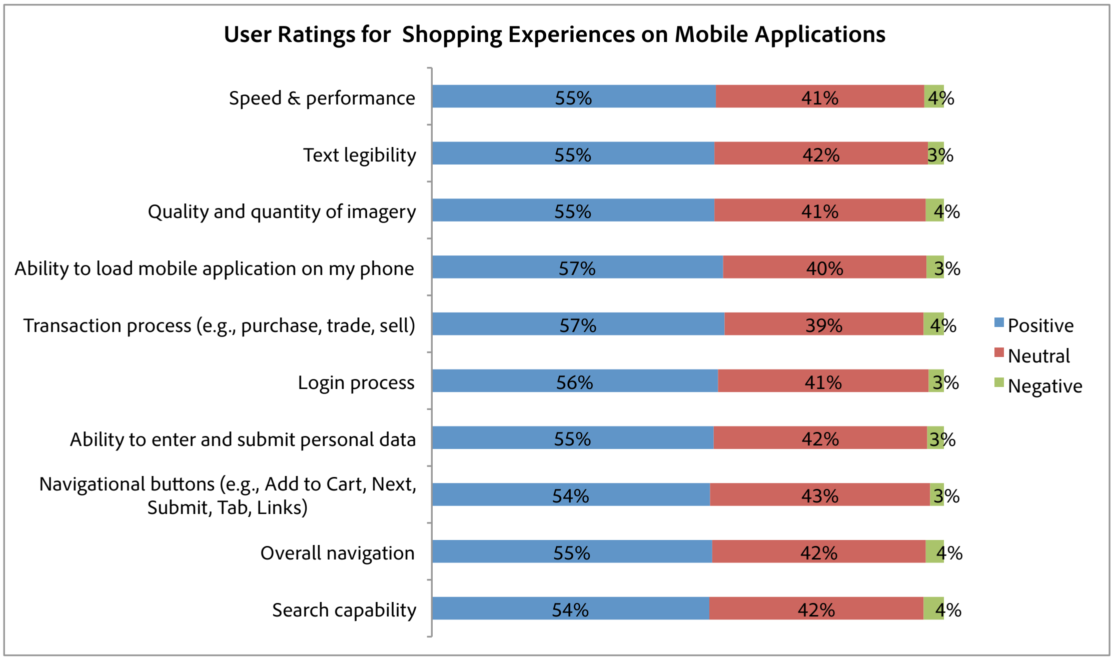


- Among device owners, satisfaction differences are more pronounced. Android and iPhone users appear most satisfied with their app experiences, likely due to the greater maturity of their app stores, which offer greater choices. Among iPhone, Android and Blackberry users, between 85 and 90% of them rate their mobile web shopping experience above average (i.e., above a score of four); when it comes to shopping apps, iPhone users are most satisfied, with more than 90% ranking their app experience above 4. For details, please see Appendix 3.

Respondents appear satisfied across a broad range of experiences on mobile shopping sites and apps.

- From load times to search, the majority of respondents rate their mobile shopping experiences positive; the percentage of users rating their experiences negative numbered in the low-single digits.

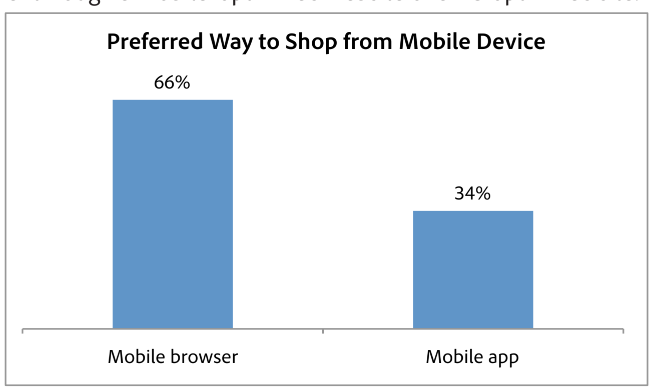




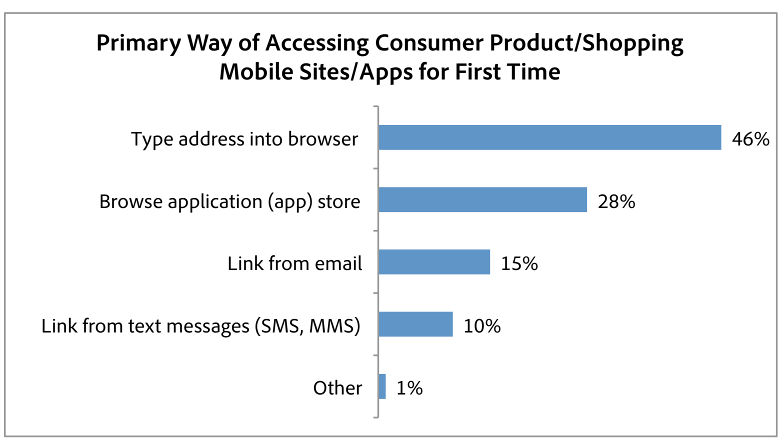
What do shoppers want? Do they want to shop with apps or browsers? What shopping features sway them to purchase?

In general, users prefer the browser experience for shopping-related activities.

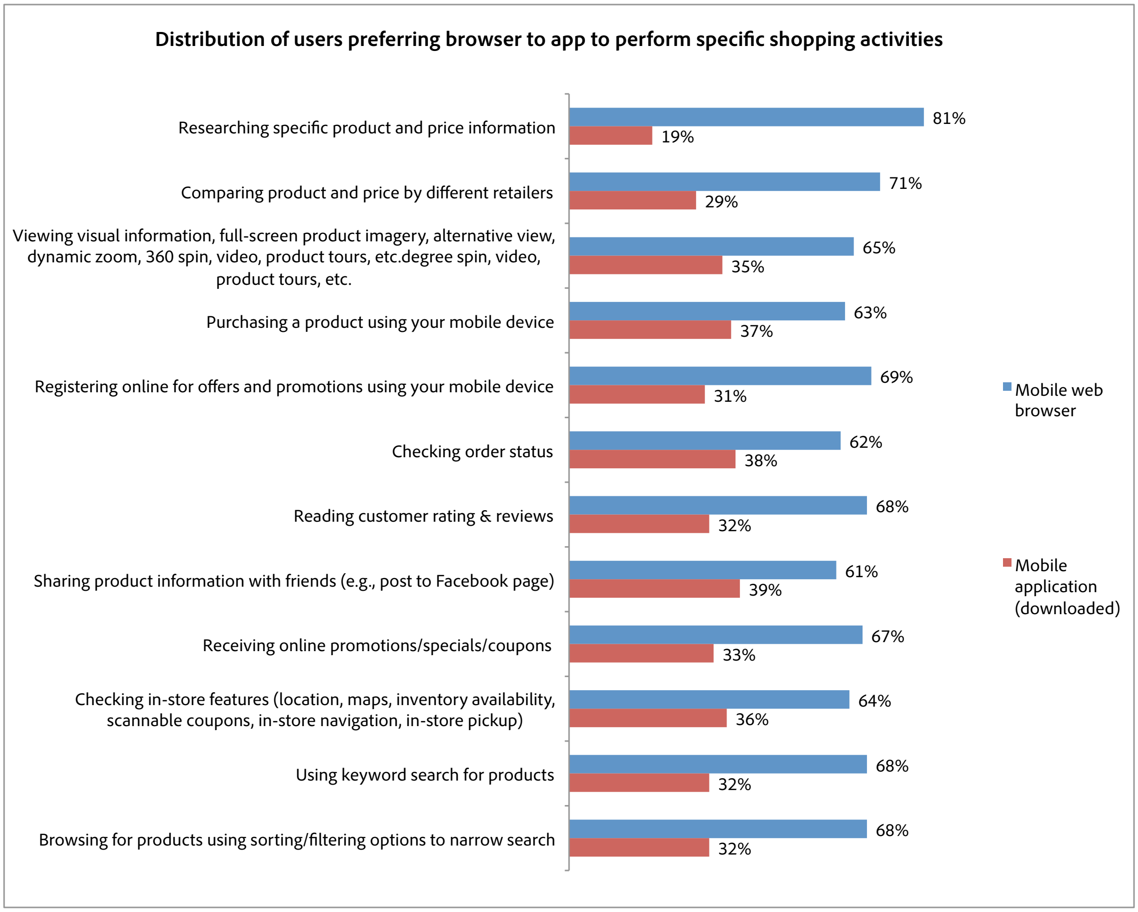
- Respondents were asked to choose from three methods with which they prefer to shop on their mobile devices: A mobile app, a browser to access a regular website or a browser to access a mobile-optimized website. Preferences split three ways equally, with two-thirds preferring to use the browser to interact with shopping content, either through a mobile-optimized website or a PC-optimized site.



- The greatest number of respondents (46%) say the browser is their primary means of accessing consumer product or shopping content for the first time.



- Across the 12 shopping-related activities measured, a majority of users prefer the browser experience, particularly for open-ended, cross-domain activities like researching specific products and pricing information. This is why mobile shoppers make browsers their first stop—apps do not allow them to browse cross domain.

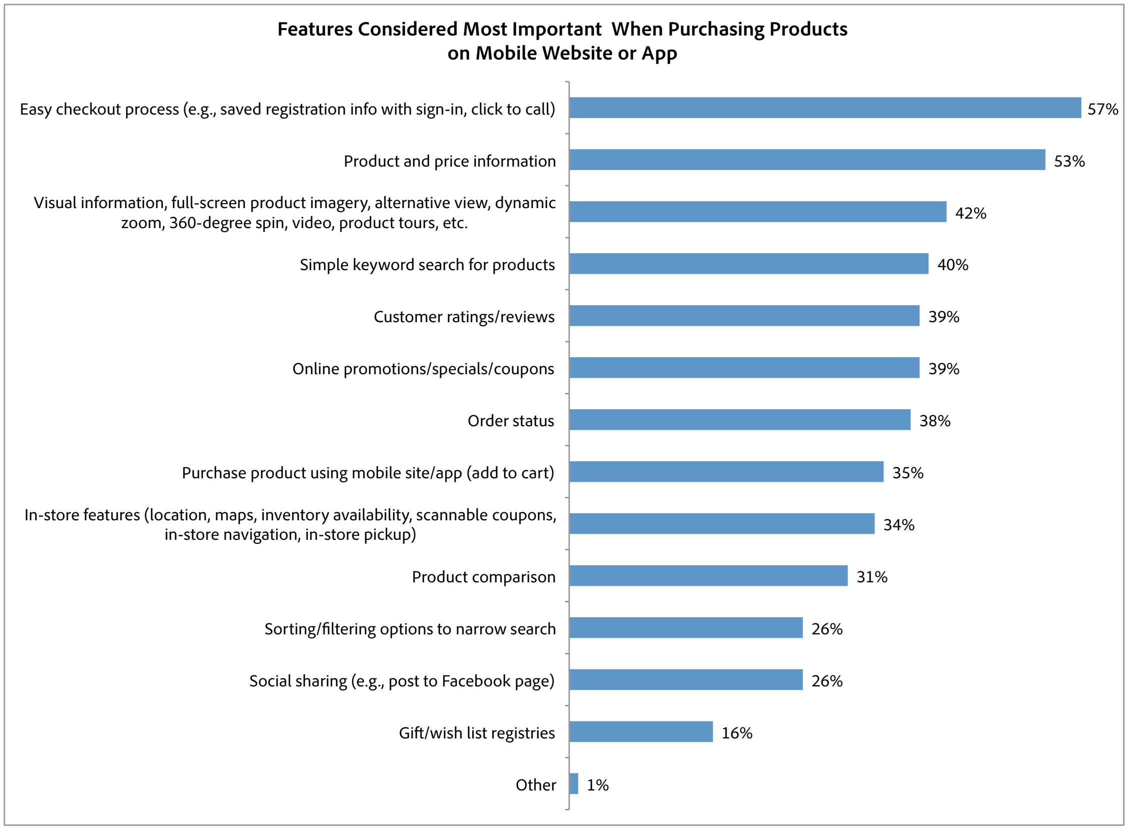


- While the browser prevailed as the preferred experience for shopping, when users are segmented by device and age, preferences for downloadable mobile apps are more pronounced. As a group, more iPhone and Android users prefer apps compared to their peers. We believe these users have a stronger app preference because the iPhone and Android platforms have a more mature apps market, offering many more apps compared to other platforms.
- Additionally, 18-29 year-olds were more likely to access the app store than older adults, as would be expected.

For details on browser versus app preferences segmented by age and device, please see Appendix 4.

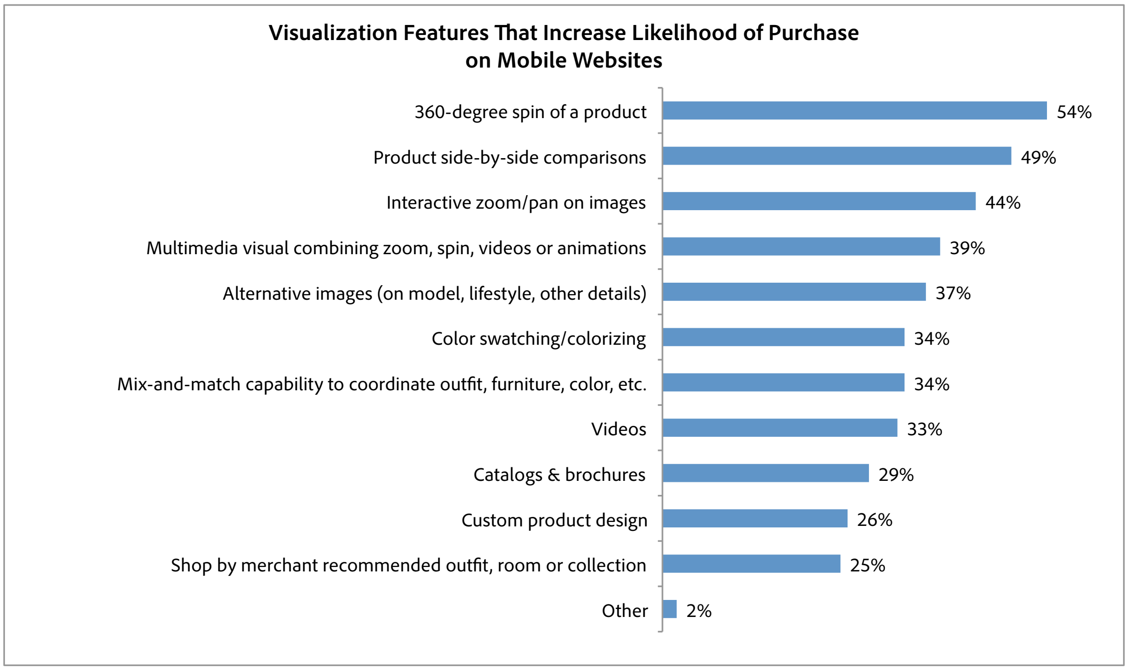
A majority of respondents rate easy checkout and product & pricing information as the most important shopping features.

- Users were asked to choose any number of features they regard most important when purchasing a product on either a mobile website or application. Easy checkout was the top feature, chosen by 57% of the respondents, followed by product and pricing information, selected by 53% of the respondents. Visual information, including full-screen product imagery, alternative views, 360-degree spin, video, product tours, ranked the next highest, selected by 42%, closely followed by simple keyword product search (40%). Customer ratings and reviews (39%) and online promotions/coupons (39%) and order status (38%) were not far behind.



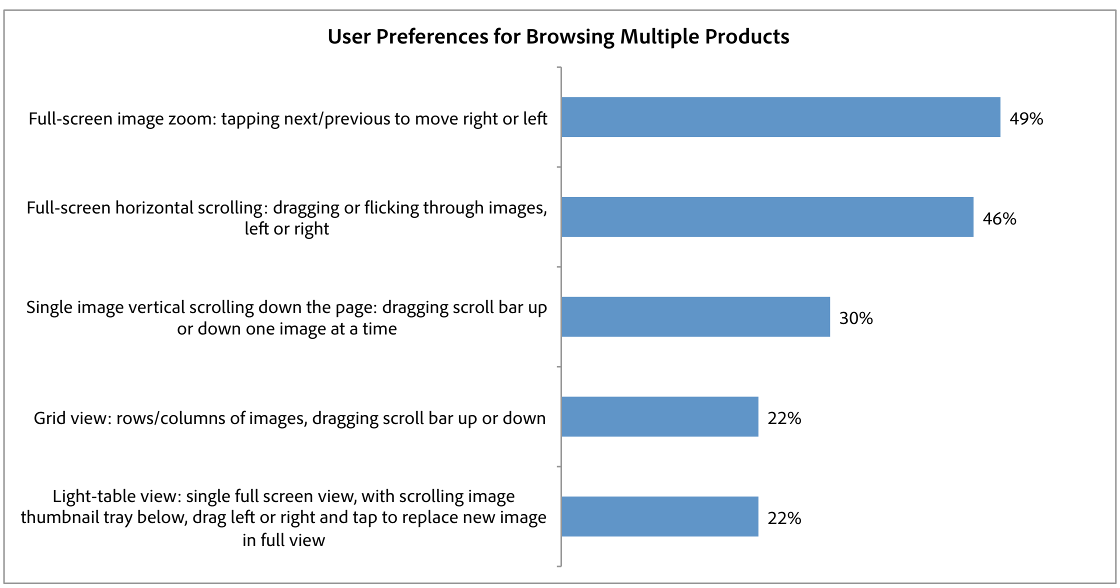
360-degree spin is cited by the most respondents as the feature most likely to influence their purchase.

• Shoppers want sophisticated features like 360-degree spin and side-by-side product comparisons in their mobile shopping experience. A majority (54%) cite 360-degree spin as most influential, followed by product side-by-side comparison, selected by nearly half of the respondents. These features are closely followed by interactive zoom/panning on images, selected by 44% of the respondents.



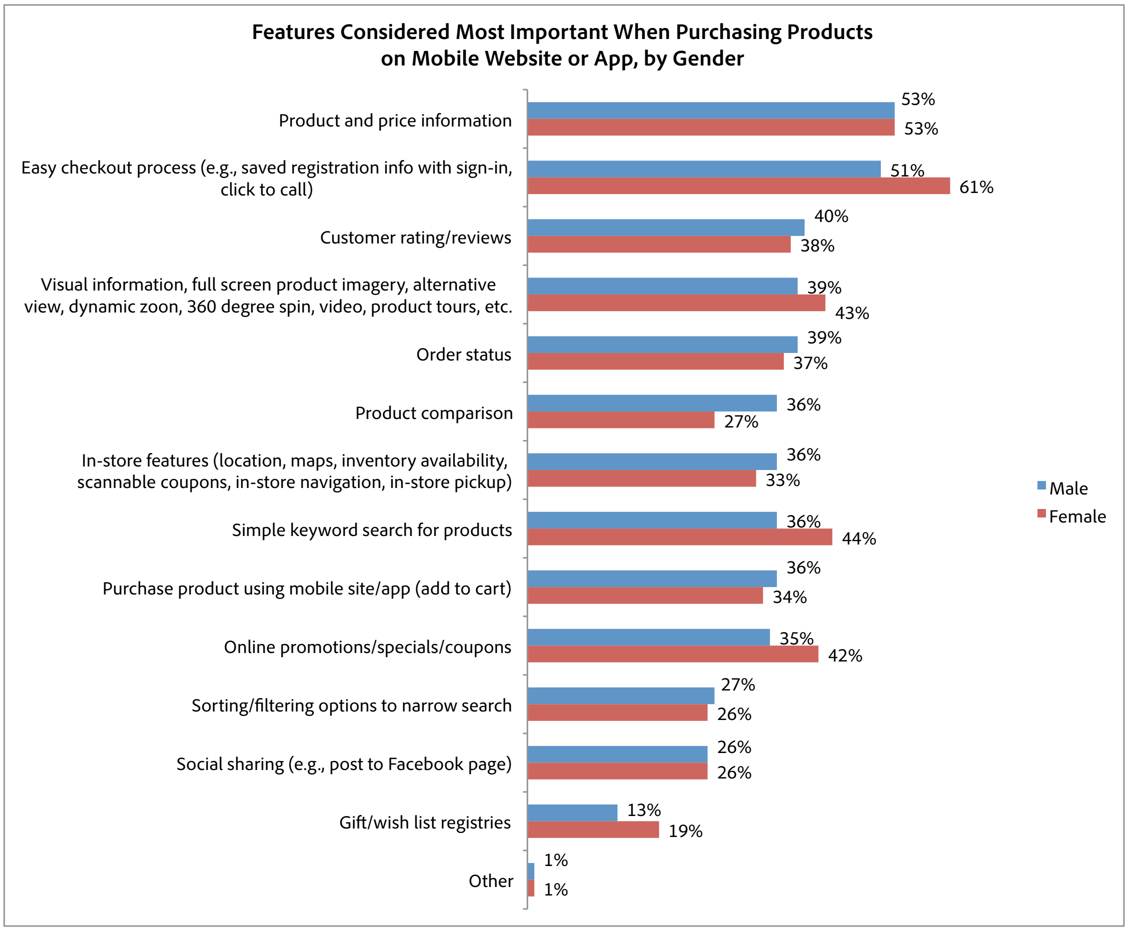
Users want full-screen images when browsing multiple products.

- The rule of thumb in online commerce is that bigger is better when it comes to product images—shoppers want as much visual information as merchants can provide.
- 49% prefer full-screen image zoom with the ability to tap on the screen to navigate left and right to see the next or previous products.
- 46% of the respondents prefer full-screen horizontal scrolling, dragging the images left and right with touchscreen gesturing.



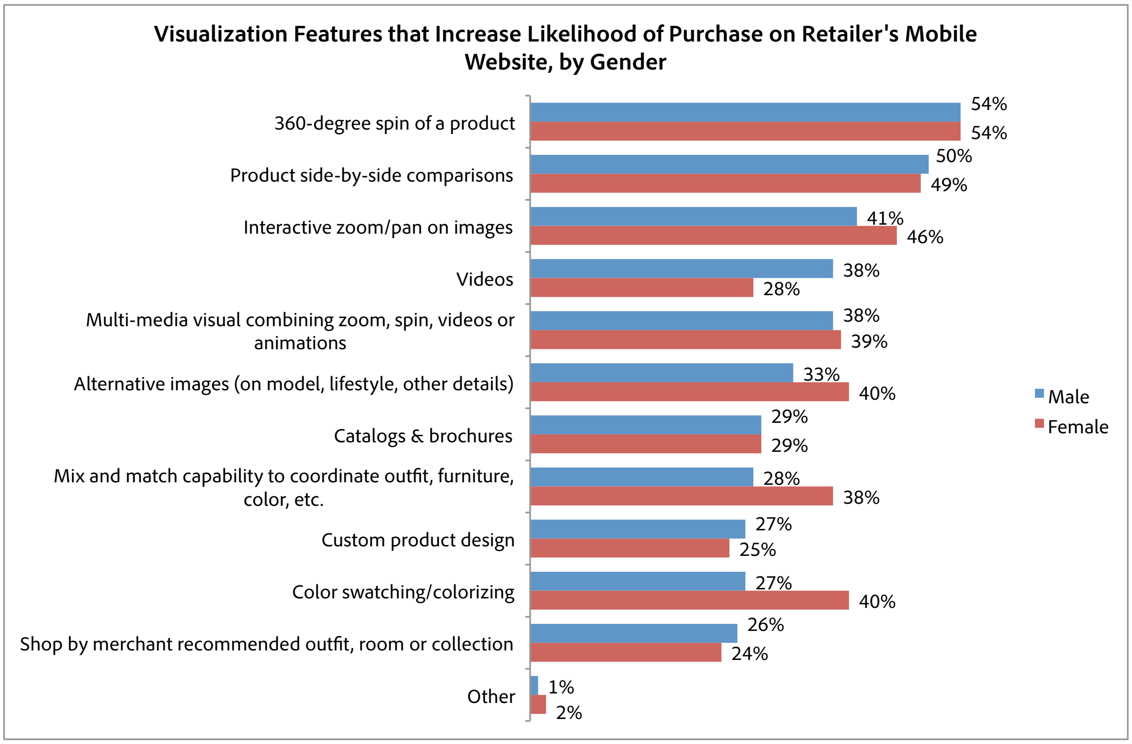
Women value more mobile shopping features than men.

- More mobile shopping features were rated important by female respondents than male respondents. For example, easy checkout was identified as important by 61% of females versus 51% of males; 44% of women identified search important versus 36% of men. More women than men consider coupons and promotions important (42 versus 35%); similarly for gift registries and wish lists (19% versus 13%). More men, however, deemed product comparisons more important.



- With regards to visual and merchandising tactics, women also tend to place a premium on more features, including color-swatching, mix-and-match, interactive zoom and alternative images (such as on-model, lifestyle images).

- Video is one area where men prevailed over women: More men than women (38% versus 28%) say video would influence their likelihood of purchase.

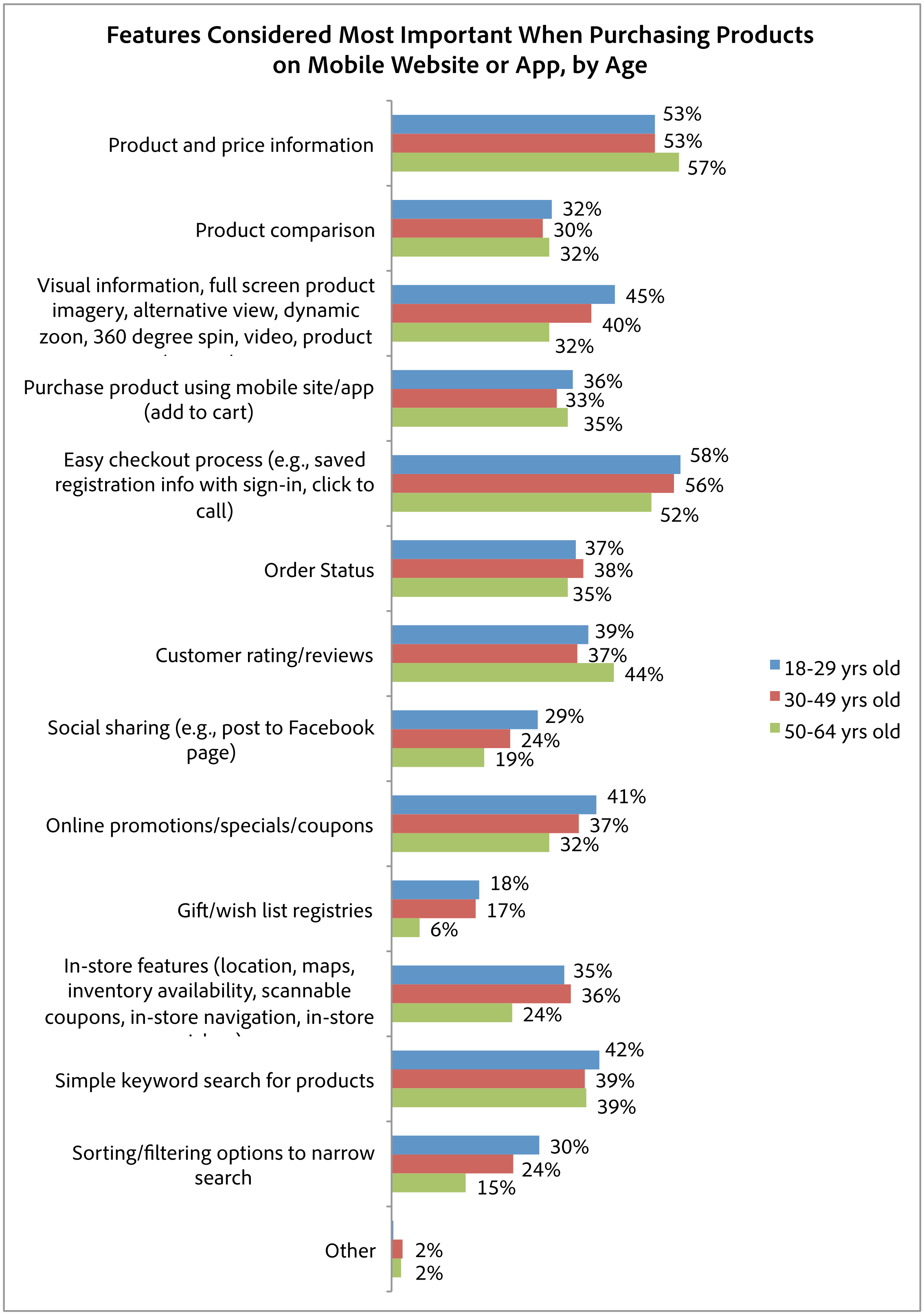


These results are not inconsistent with women's dominance in online shopping. Even though they represent just under half of U.S. Internet users, women account for 58% of eCommerce revenues.[7] Women's more frequent interactions with online shopping make them well-informed and savvy shoppers; accordingly, they will also have higher expectations.

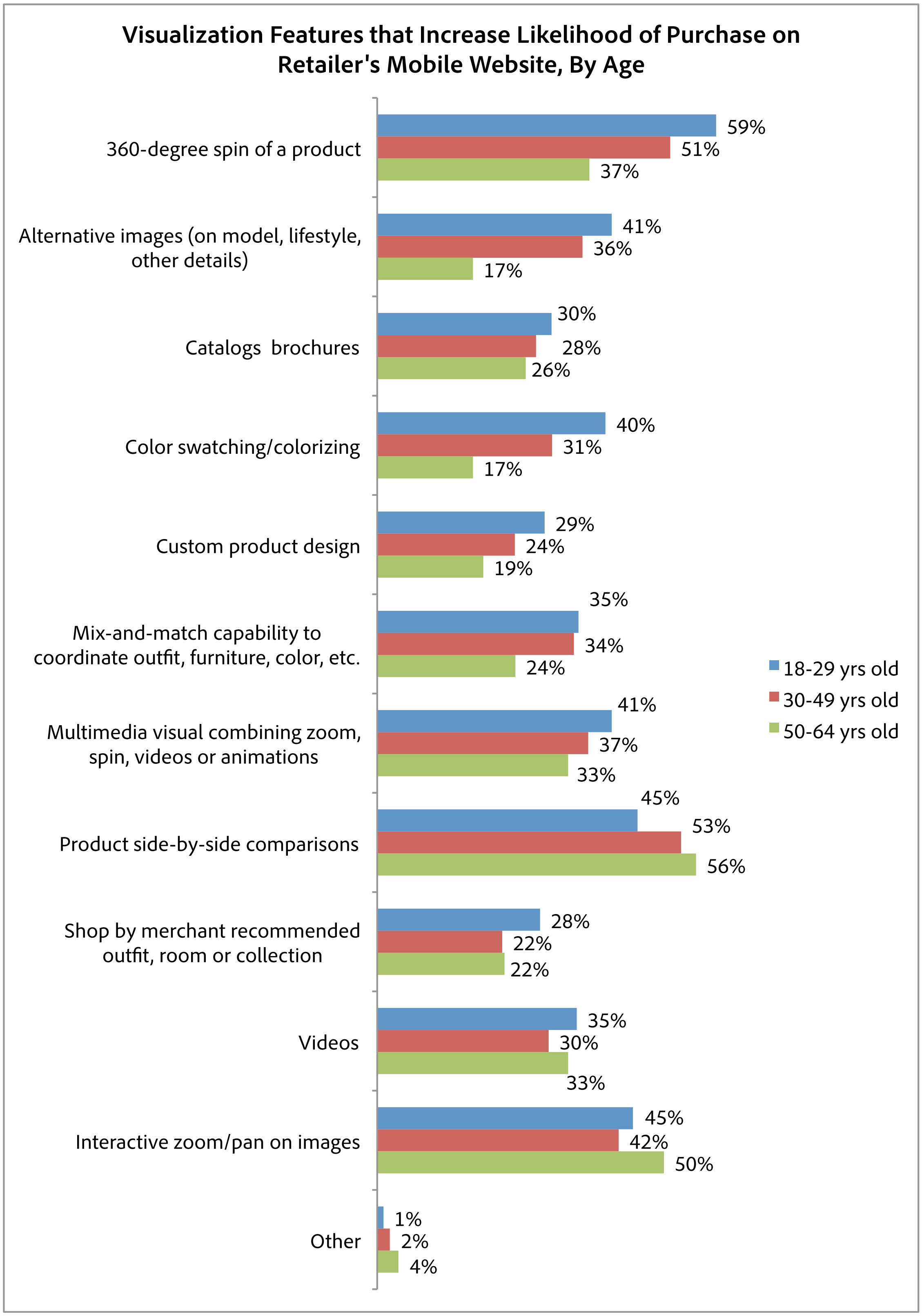
7 comScore, Women on the Web, June 2010

Social sharing and sorting/filtering options to narrow search results were ranked by younger shoppers as important shopping features.

- With a few exceptions, 18-29 year olds tend to place greater importance on visual information than their older peers. As a group, they regard features like alternative images and 360-degree spin as important in greater proportion than older age groups.



Please note that the 50-64 year-old age group constitutes an insufficient sample size from which to draw statistically significant conclusions.



Please note that the 50-64 year-old age group constitutes an insufficient sample size from which to draw statistically significant conclusions.

Appendix 1 – Survey Participant Profile*

	% of Total	Gender distribution by age		
		18 -29 yr old	30 – 49 yr old	50 – 64 yr old
Male	45%	43%	46%	10%
Female	55%	53%	42%	5%

Age distribution		
18-29 yr old	30-49 yr old	50-64 yr old
49%	43%	7%

Device ownership by gender and age							
	Android	Blackberry	iPhone/iPad	Palm	Symbian	Windows Mobile	Other
% of Total	19%	22%	44%	3%	2%	3%	7%
Male	21%	21%	48%	3%	2%	3%	3%
Female	17%	24%	41%	4%	2%	3%	9%
18-29 yr old	24%	21%	42%	3%	2%	2%	6%
30-49 yr old	15%	23%	50%	3%	1%	3%	6%
50-64 yr old	11%	32%	22%	9%	4%	9%	13%

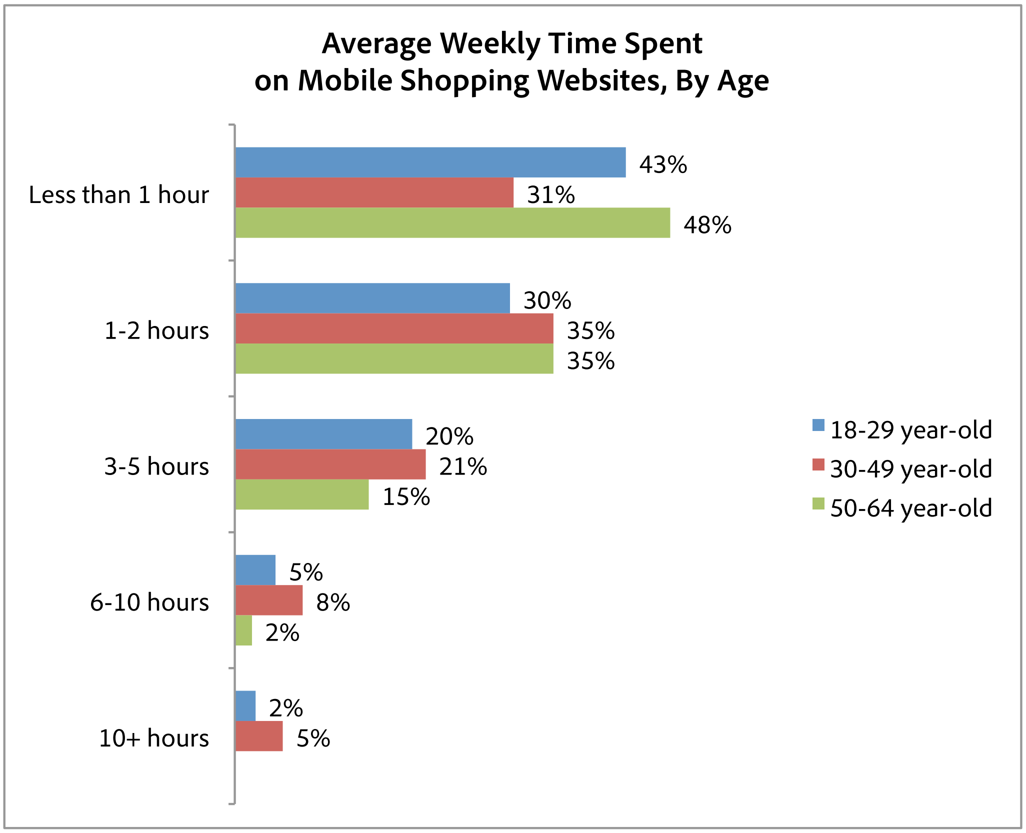
Percentage of participants owning touchscreen devices		
82%		
Male	Female	
82%	81%	
18-29 yr old	30-49 yr old	50-64 yr old
84%	82%	69%

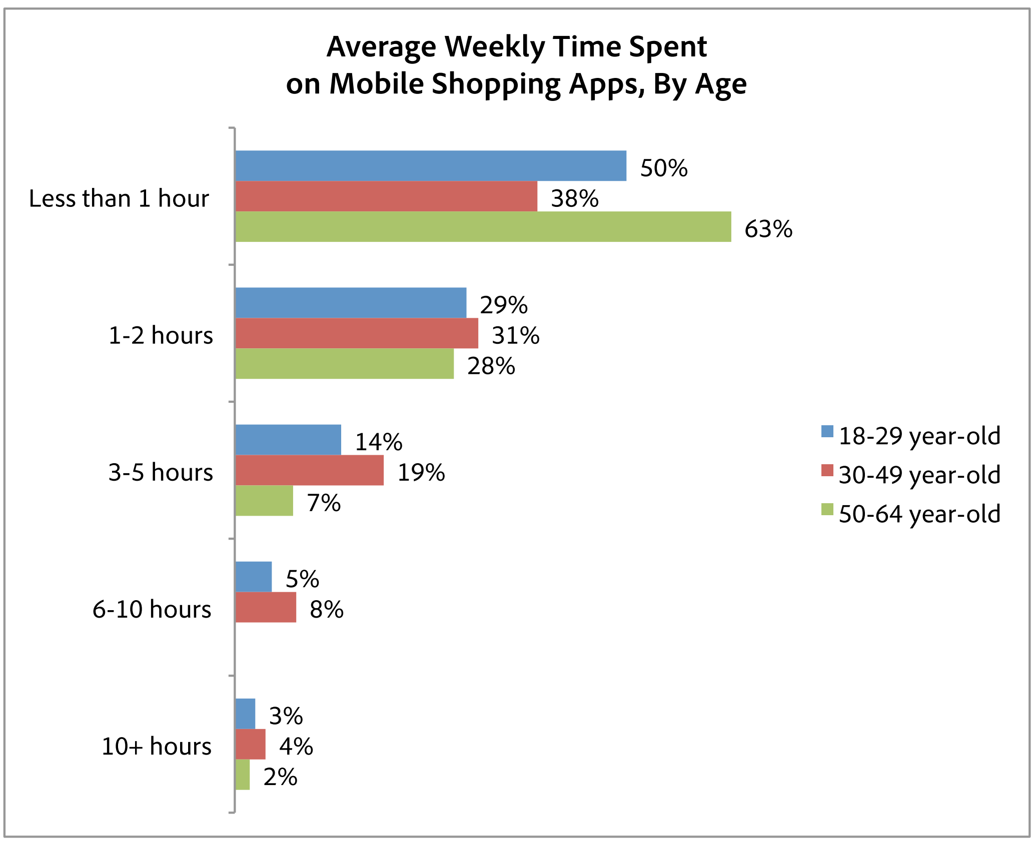
*Measures profile of 739 participants who have engaged in mobile commerce in the last 6-12 months from the date of the survey.

Please note that the 50-64 year-old age group constitutes an insufficient sample size from which to draw statistically significant conclusions.

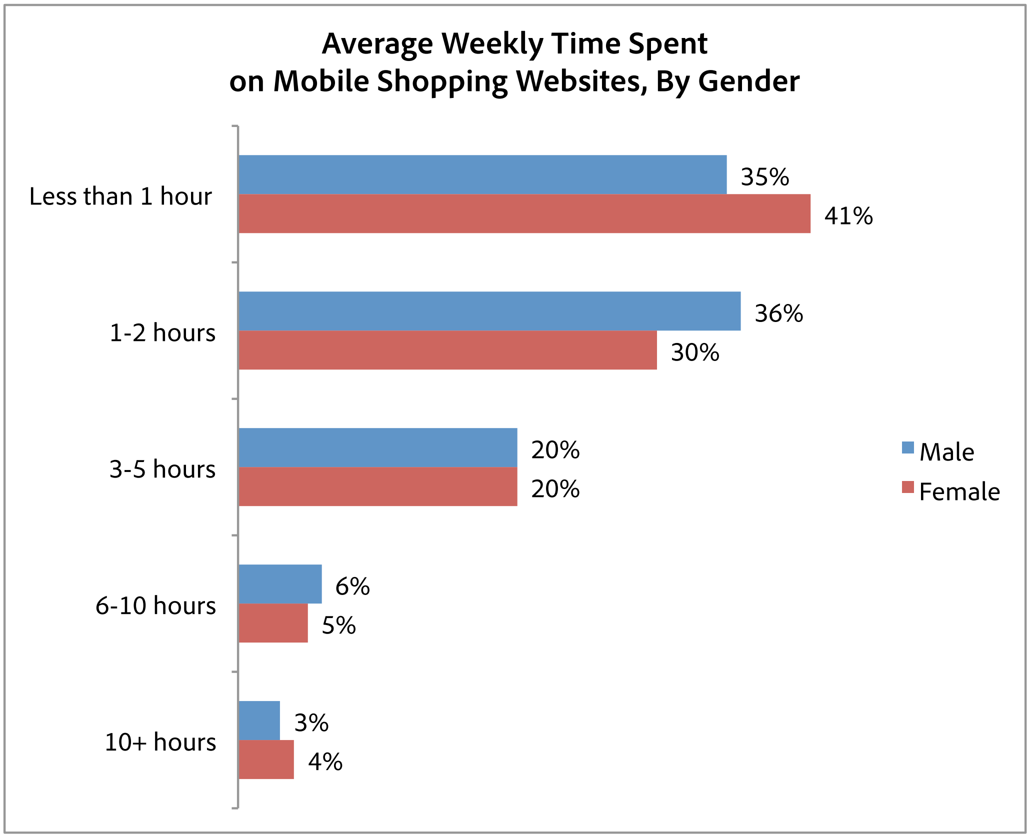
Appendix 2 –Mobile Shopping Behavior by User Segments

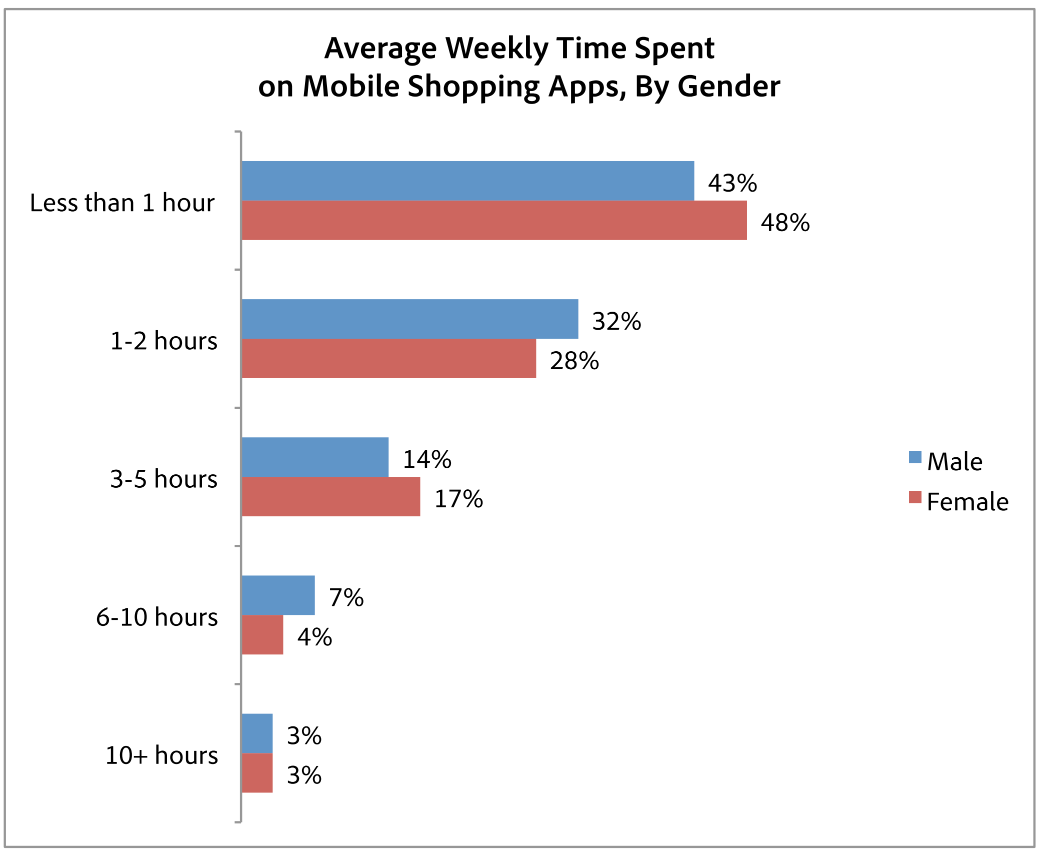
The amount of time users spend on mobile shopping varies by gender, age and device.

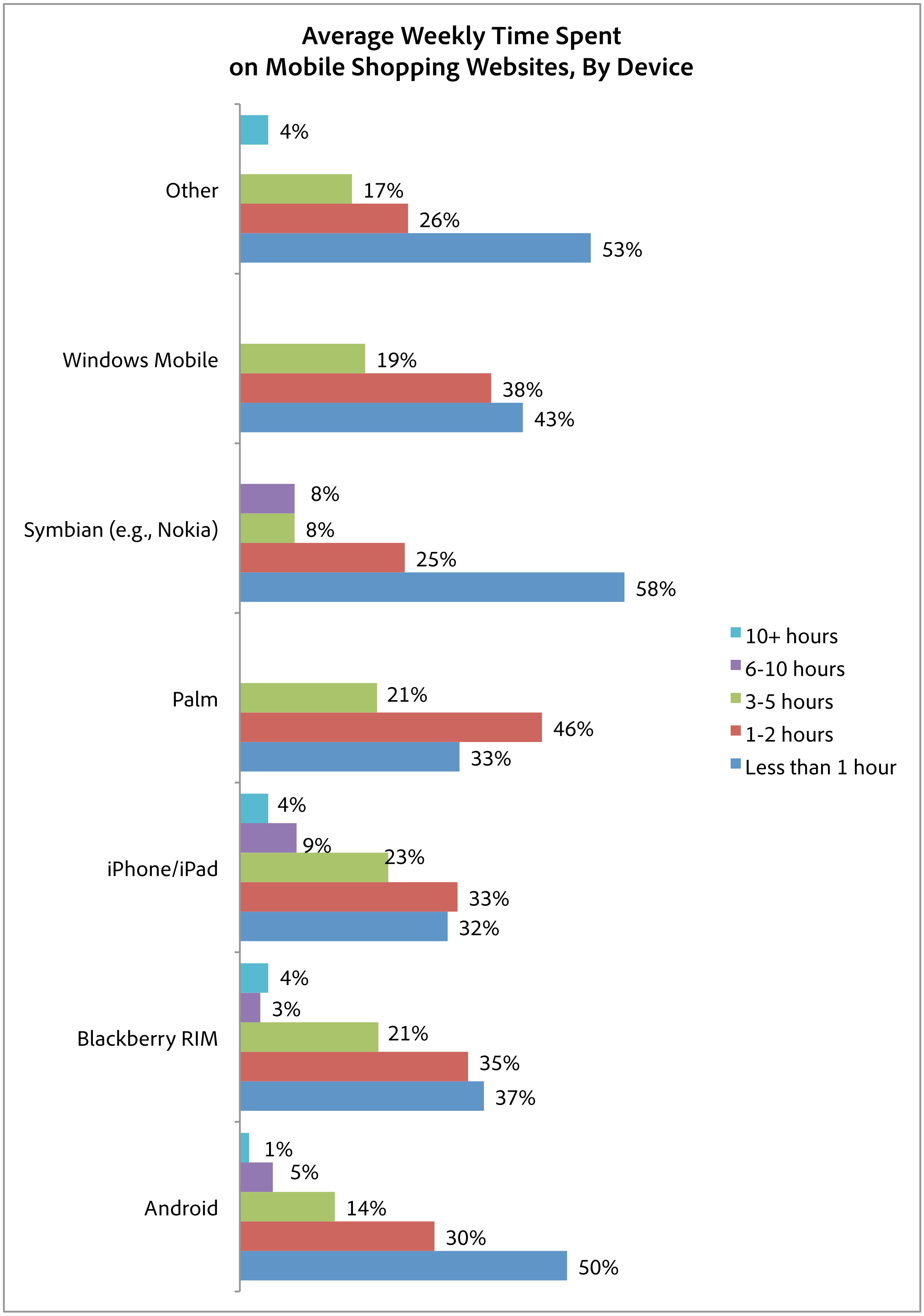


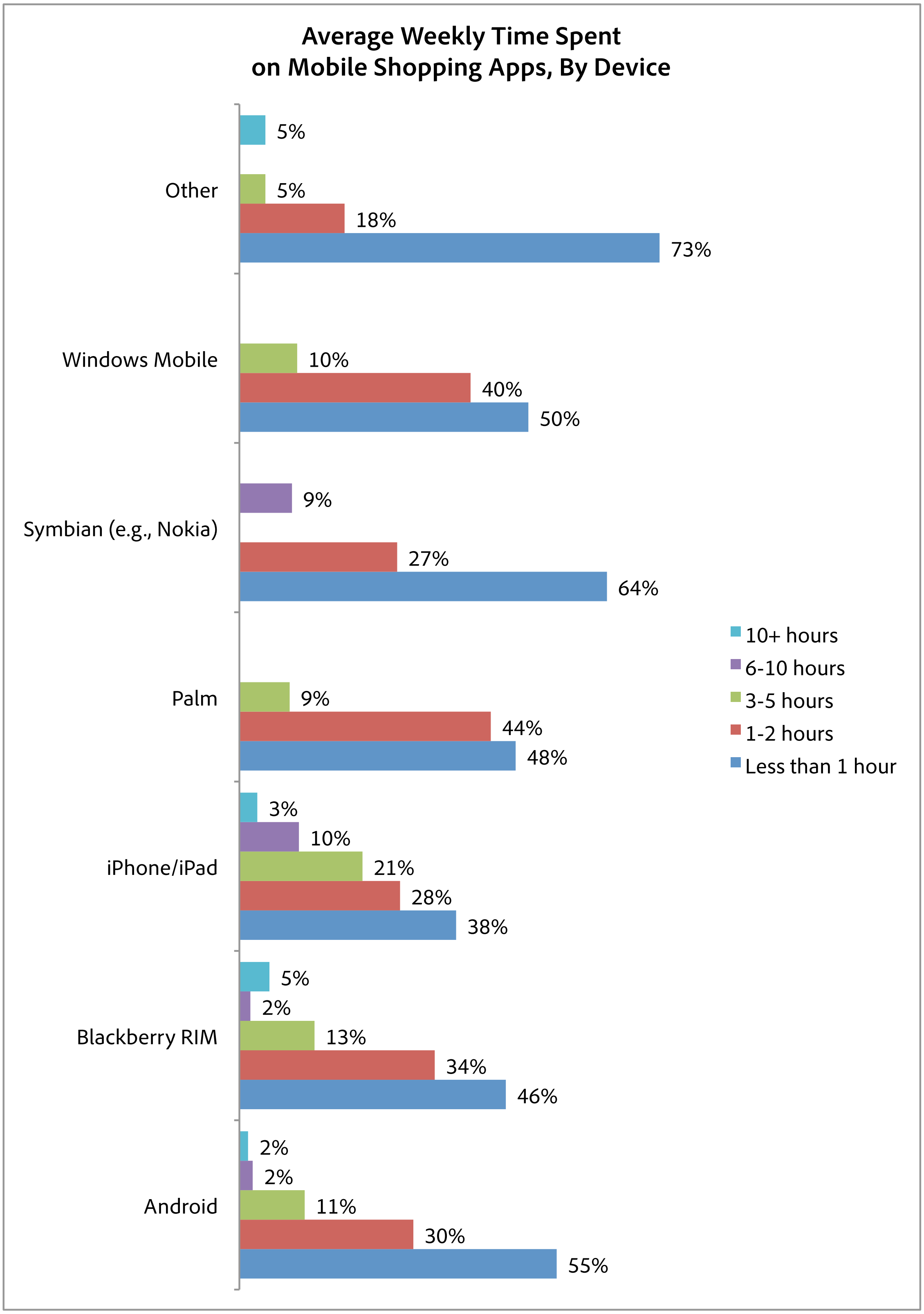


Please note that the 50-64 year-old age group constitutes an insufficient sample size from which to draw statistically significant conclusions.


Average Weekly Time Spent
on Mobile Shopping Websites, By Gender
Less than 1 hour
1-2 hours
3-5 hours
6-10 hours
10+ hours
35%
41%
36%
30%
20%
20%
6%
5%
3%
4%
Male
Female


Average Weekly Time Spent
on Mobile Shopping Apps, By Gender
Less than 1 hour
1-2 hours
3-5 hours
6-10 hours
10+ hours
43%
48%
32%
28%
14%
17%
7%
4%
3%
3%
Male
Female


Average Weekly Time Spent
on Mobile Shopping Websites, By Device
Other
4%
17%
26%
53%
Windows Mobile
19%
38%
43%
Symbian (e.g., Nokia)
8%
8%
25%
58%
Palm
21%
46%
33%
iPhone/iPad
4%
9%
23%
33%
32%
Blackberry RIM
4%
3%
21%
35%
37%
Android
1%
5%
14%
30%
50%
10+ hours
6-10 hours
3-5 hours
1-2 hours
Less than 1 hour


Average Weekly Time Spent
on Mobile Shopping Apps, By Device
Other
5%
5%
18%
73%
Windows Mobile
10%
40%
50%
Symbian (e.g., Nokia)
9%
27%
64%
Palm
9%
44%
48%
iPhone/iPad
3%
10%
21%
28%
38%
Blackberry RIM
5%
2%
13%
34%
46%
Android
2%
2%
11%
30%
55%
10+ hours
6-10 hours
3-5 hours
1-2 hours
Less than 1 hour

Appendix 3 – Mobile Shopping Satisfaction by User Segments

Satisfaction levels with mobile shopping on apps or websites tend to show the greatest variation when users are segmented by device.

Distribution of Satisfaction Ratings, Mobile Shopping Websites.

Ranked from 1 to 7 (7 = Very Satisfied), By Device

	Android	Blackberry RIM	iPhone/iPad	Palm	Symbian (e.g., Nokia)	Windows Mobile	Other
7	28%	27%	32%	24%	25%	19%	22%
6	36%	32%	36%	36%	0%	14%	29%
5	22%	27%	21%	24%	50%	48%	29%
4	12%	7%	6%	4%	8%	10%	6%
3	1%	4%	3%	0%	8%	10%	6%
2	0%	1%	0%	0%	8%	0%	2%
1	1%	1%	0%	8%	0%	0%	2%
Never used	0%	2%	1%	4%	0%	0%	4%

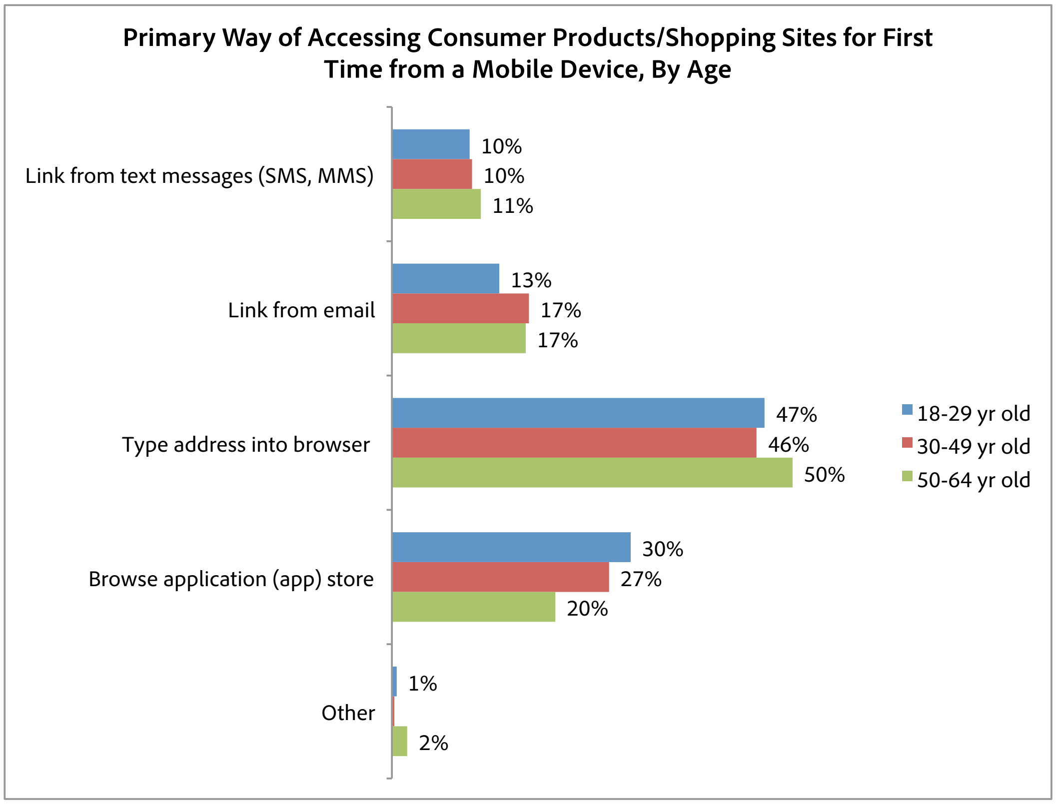
Distribution of Satisfaction Ratings, Mobile Shopping Apps.

Ranked from 1 to 7 (7 = Very Satisfied), By Device

	Android	Blackberry RIM	iPhone/iPad	Palm	Symbian (e.g., Nokia)	Windows Mobile	Other
7	32%	31%	35%	24%	17%	10%	16%
6	30%	31%	36%	44%	33%	38%	25%
5	20%	18%	21%	12%	17%	33%	29%
4	10%	8%	4%	4%	17%	5%	8%
3	1%	2%	2%	0%	0%	5%	8%
2	0%	1%	0%	4%	8%	0%	2%
1	1%	1%	0%	4%	0%	5%	2%
Never used	4%	7%	2%	8%	8%	5%	10%

Appendix 4 – Browser vs App Preferences by User Segments

Whether consumers prefer to use a browser or an app to shop on their mobile devices tend to vary by age and device.



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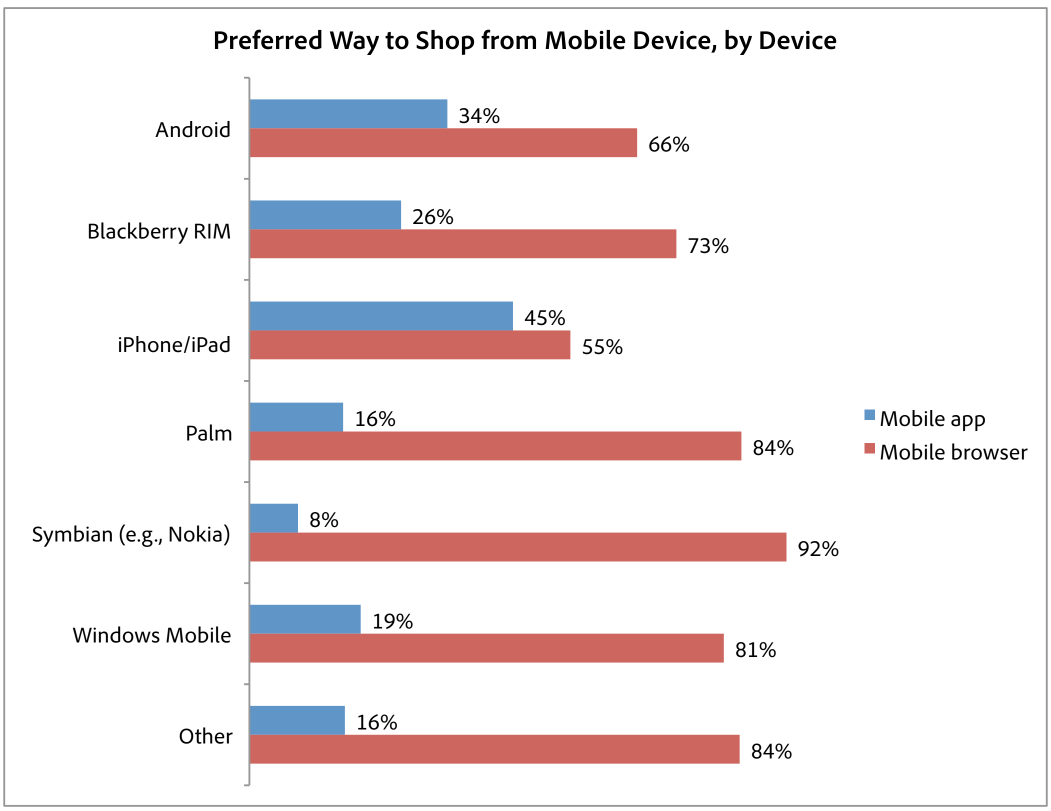

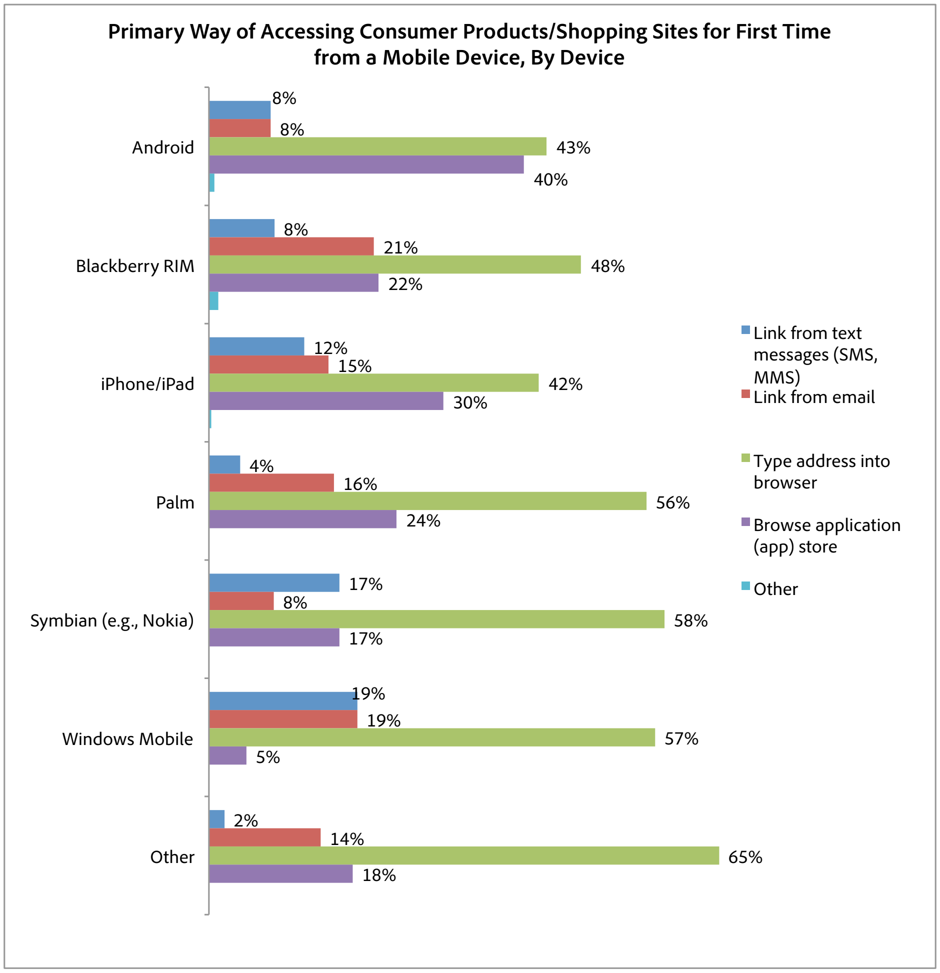

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The Adobe Scene7 cross media publishing platform is the industry-leading solution for delivering dynamic content to any channel – web, email, print and mobile. With Scene7, businesses can improve the entire selling and marketing cycle from attracting customers, to guiding them to the right products and services, to successfully converting them into loyal buyers. Scene7 is performance optimized to dynamically generate and deliver unlimited variations from master imagery—shortening time to market and drastically reducing costs. Solutions for managing, enhancing and delivering dynamic media include Scene7 Publishing System, Media Portal, Dynamic Imaging, Dynamic Banners, eCatalogs, eVideos, Visual Configurators, Web-to-Print, Web & Social, Email & Print, and Mobile & Multi-Screen. Leading companies using Adobe Scene7 solutions include QVC, Harrods, Macy's, Office Depot, Polo Ralph Lauren, La-Z-Boy, Blockbuster, VF Corporation and Levi Strauss & Co. For more information about the Adobe Scene7 cross media platform, visit www.scene7.com.

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