

From bricks to clicks: Which retailers are carving out space in the m-commerce market?

RESTON, US: comScore, Inc, a leader in measuring the digital world, today released a study on US smartphone shopping behavior based on data from its [comScore Mobile Metrix 2.0](#) service.



The study found that 4 in every 5 smartphone users - 85.9 million in total - accessed retail content on their device in July. Amazon Sites led as the top retailer with an audience of 49.6 million visitors, while multi-channel retailers including Apple (17.7 million visitors), Wal-Mart (16.3 million visitors), Target (10 million visitors) and Best Buy (7.2 million visitors) also attracted significant mobile audiences.

"With nearly 86 million Americans now shopping on their smartphones, this pronounced shift in consumer behavior is simply too large for retailers to ignore, with the future of their business depending on how well they adapt to the new environment," said Mark Donovan, comScore SVP of mobile. "But adapting isn't always easy, especially when considering the complexity of the mobile environment, which requires optimising the experience across multiple platforms and for both mobile websites and apps. The retailers who best understand how consumers are engaging in mobile shopping behaviors and design their strategy accordingly will be best positioned to capitalise on these shifting market dynamics."

Amazon sites leads as the top retail destination for smartphone owners

In July 2012, 85.9 million people age 18 and older visited a retail destination via a mobile browser or app on their smartphone, representing 4 in every 5 smartphone owners (accessing from a device running the iOS, Android or RIM operating systems). Analysis of selected retailers found that Amazon Sites led as the top destination with an audience of 49.6 million unique visitors, representing 46.6% of smartphone owners, followed by eBay with 32.6 million visitors and Apple with 17.7 million visitors. Wal-Mart had the largest reach among traditional brick-and-mortar retailers with 16.3 million visitors, followed by Target with 10 million visitors and Best Buy with 7.2 million smartphone visitors.

Ticketmaster attracted 5.7 million visitors as summer concerts and performances saw fans turn to their smartphones for tickets and information, while seasonal home improvements fueled visitation to the Home Depot (4.4 million visitors) and competitor Lowes (3.2 million visitors).

As mobile becomes an increasingly important channel for retailers to reach current and potential customers, other companies are recognising the opportunity smartphones present throughout the shopping process. Shopkick, a shopping rewards app that provides points for consumers who visit retail partners' physical stores such as Target, Macy's, Best Buy, etc., saw its mobile audience reach more than 4 million visitors in July, demonstrating one way consumers are turning to their mobile devices as part of their in-store shopping experience.

<p>Selected Retail Properties by Unique Smartphone Visitors(000) (Mobile Browser and App Audience Combined) July 2012 Total US Smartphone Subscribers Age 18+ on iOS, Android and RIM Platforms (Source: comScore Mobile Metrix 2.0)</p>

	All Smartphones	
	Total Unique Visitors (000)	% Reach
Retail Category	85,905	80.6%
Amazon Sites	49,636	46.6%
eBay	32,583	30.6%
Apple	17,684	16.6%
Wal-Mart	16,295	15.3%
Target	10,041	9.4%
Best Buy	7,177	6.7%
Ticketmaster	5,699	5.3%
CVS	4,468	4.2%
The Home Depot	4,353	4.1%
Blockbuster	4,017	3.8%
Barnes & Noble	3,804	3.6%
Walgreen	3,707	3.5%
Limited Brands	3,261	3.1%
Lowe's	3,246	3.0%
Etsy	3,160	3.0%

Retailer penetration differs between iPhone and Android audiences

Mobile Metrix 2.0 provides the ability to view audience activity across smartphone operating systems for more granular insights on platform performance. Among both iPhone and Android users, Amazon ranked the top retailer attaining a reach of 43% among iPhone users and 55% among Android users, with visitation to the Amazon Appstore largely accounting for the higher reach among Android users. In contrast, Apple commanded a much stronger and expected 33.5% reach among iPhone owners compared to 7.3% among Android users. Among the majority of the selected retailers, iPhone had a higher penetration compared to Android, while in most cases Android devices delivered a larger audience due to the platform's higher overall market penetration.

Selected Retail Properties by Unique Smartphone Visitors (000) on iOS and Android Devices (Mobile Browser and App Audience Combined) July 2012 Total US Smartphone Subscribers Age 18+ on iOS and Android Platforms (Source: comScore Mobile Metrix 2.0)

	iPhone	Android		
	Total Unique Visitors (000)	% Reach	Total Unique Visitors (000)	% Reach
Retail	34,857	90.6%	47,797	82.1%
Amazon Sites	16,540	43.0%	32,010	55.0%
eBay	13,098	34.1%	18,574	31.9%
Apple	12,880	33.5%	4,261	7.3%
Wal-Mart	7,012	18.2%	8,859	15.2%
Target	4,084	10.6%	5,620	9.7%
Best Buy	3,302	8.6%	3,816	6.6%
Ticketmaster	2,676	7.0%	2,930	5.0%
CVS	1,822	4.7%	2,641	4.5%
The Home Depot	2,050	5.3%	2,169	3.7%
Blockbuster	277	0.7%	3,729	6.4%
Barnes & Noble	1,256	3.3%	2,408	4.1%
Walgreen Co.	829	2.2%	2,787	4.8%
Limited Brands	1,575	4.1%	1,586	2.7%
Lowe's	1,471	3.8%	1,730	3.0%
Etsy	1,887	4.9%	1,263	2.2%

Females account for a higher share of retail minutes on smartphones vs. desktop computers

Analysis of smartphone shoppers versus those visiting on desktop or laptop computers revealed new

insights into audience demographics. Across both smartphones and desktop computers, males and females represented nearly equal proportions of retail category visitors. However, females accounted for a higher share of time spent on retail destinations at 53.4% of minutes on desktop computers and an even greater share of retail minutes on smartphones at 56.1%.

Smartphone shoppers were also more likely to be younger than their desktop counterparts with 70.7% of smartphone retail visitors under the age of 45 compared to 61.1% of desktop users. Engagement among these audiences showed even greater disparity with visitors under the age of 45 accounting for nearly 3 in every 4 minutes spent on retail content via smartphones, compared to 61.6% of retail minutes on desktop computers.

Smartphone retail audiences were more likely to reside in higher income households compared to desktop computer users, likely as a result of smartphone ownership skewing towards higher income segments compared to an average consumer. Among smartphone audiences accessing retail destinations, nearly 1 in every 3 had a household income of US\$100k or greater, with this income segment driving a comparable 31.2% of minutes spent on retail sites and apps.

Retail Category Demographic Profile - PC and Smartphone Usage July 2012 Total US Smartphone Subscribers Age 18+ on iOS, Android and RIM Platforms, Total US Online Audience Age 18+ - Home/Work Computer Access (Source: comScore Mobile Metrix 2.0 and comScore Media Metrix)

	Desktop/Laptop Computer Visitors	Smartphone Visitors		
	% Composition of Retail Unique Visitors	% Composition of Retail Total Minutes	% Composition of Retail Unique Visitors	% Composition of Retail Total Minutes
Gender:				
Males	48.6%	46.6%	51.0%	43.9%
Females	51.4%	53.4%	49.0%	56.1%
Age:				
Persons: 18-24	15.0%	11.8%	19.3%	18.1%
Persons: 25-34	23.3%	23.3%	28.6%	33.6%
Persons: 35-44	22.8%	26.5%	22.8%	22.1%
Persons: 45-54	19.7%	19.8%	15.5%	16.3%
Persons: 55-64	12.1%	12.1%	10.3%	8.0%
Persons: 65+	7.2%	6.5%	3.6%	1.9%
Household Income:				
Less than US\$25K	15.4%	12.3%	12.1%	12.0%
US\$25k	14.1%	13.1%	9.4%	9.2%
US\$40k	22.2%	21.9%	10.8%	11.1%
US\$60k	10.1%	10.0%	19.5%	22.5%
US\$75k	14.5%	16.0%	15.5%	14.1%
US\$100k+	23.8%	26.7%	32.6%	31.2%

comScore's unified digital measurement for mobile

Mobile Metrix 2.0 utilises comScore's Unified Digital Measurement for smartphone devices, combining passive on-device measurement with census-level data to provide one of the most accurate and detailed views into actual US mobile media usage across apps and mobile browsing. comScore's tagging for mobile web and app assets is simple to implement and is available today at no cost to publishers worldwide. For more information, please contact your comScore representative. Not a client? Visit direct.comscore.com and sign up for free to start tagging today.

To learn more about comScore Mobile Metrix 2.0, please visit: www.comscore.com/MobileMetrix

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