

Domestic Smart Phone Commerce Market: Key Research Findings 2013

◆ Research Outline

Yano Research Institute has conducted a study on domestic e-commerce market using smart phone terminals with the following conditions:

1. Research period: July to August, 2013
2. Research target: Domestic companies in the business of EC services (sales of goods, services, and digital contents, application), etc.
3. Research methodologies: Face-to-face interviews, telephone/email surveys, literature research and Web services

<What is Smart Phone Commerce?>

Smart phone commerce in this research indicates those e-commerce developed only using smart phones as a channel. There are various types including sales of goods, services, digital contents, and applications.

◆ Key Findings

■ Forecast of Domestic EtoC Smart Phone Commerce Market Size Expected to Reach 1,346.9 Billion Yen in 2013, and to Exceed 2 Trillion Yen in 2015

The domestic EtoC smart phone market in 2013 is likely to reach 1,346.9 billion yen, 159.4% of the size of 2012 which was 845.0 billion yen. With transactions of EC market via smart phones became more activated, it is expected that both the domestic EC market and offline retail market (i.e., the retail market excluding EC market) are anticipated to expand. The domestic BtoC smart phone market is expected to attain 2,041.3 billion yen in 2014, and 2,667.7 billion yen in 2015, exceeding 2 trillion yen by 2014.

■ Purchase Rate using Domestic EC Market and Offline Retail Market (i.e. Retail Market excluding EC Market) Rises, While Some Areas via Feature Phones may Disappear

The domestic EC market using the channel of smart phones is expanding. The increasing number of smart phone users is boosting e-commerce of off line retail market. On the other hand, however, some areas of EC market using conventional feature phones, especially those services highly dependent upon the characteristics of feature phones like music distribution services, have been shrinking rather than moving to smart phones and other platforms.

■ Prominent Users in EC Market via Smart phones are Women in 20s, Especially Driving Purchasing of Goods

When comparing whether or not people have any experience in EC commerce through smart

phones by age group, the highest rate of having experience of such EC commerce are women in their 20s occupying 74.0 %, followed by women in their teens 55.0%. The next comes men in their 30s and women in their 30s both marking 50%. The most active users, women in their 20s, especially use EC market for purchasing goods through smart phones. Therefore, this area is very likely to be promising for the future.

◆ **Report format:**

Published report: “Smart Phone Commerce Market 2013”

Issued on: September 9, 2013

Language: Japanese

Format: 219 pages in A4 format

Price: 157,500 yen (7,500 yen of consumption tax shall be charged for the sales in Japan.)

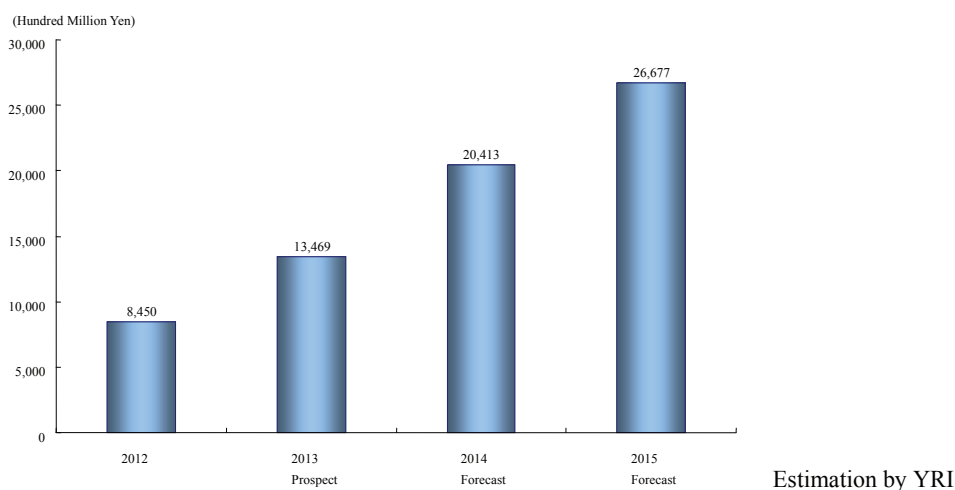
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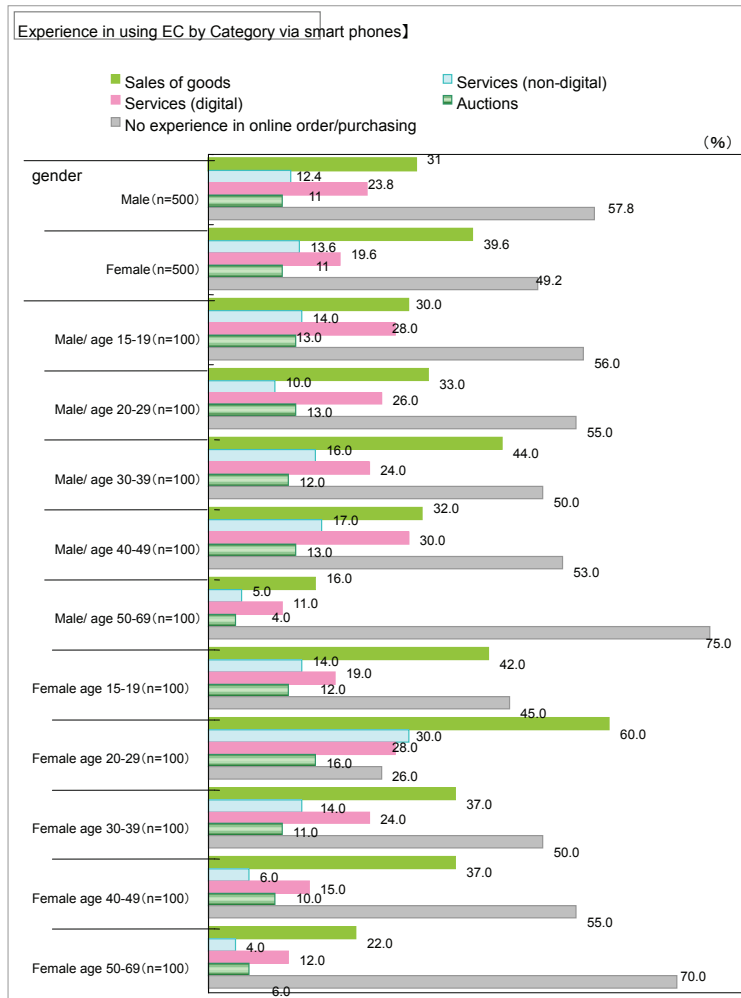
■ **Figure 1: Forecast of Domestic Smart Phone Commerce Market Size**



Notes:

1. The figures are based on sales of businesses.
2. The market size is calculated based on BtoC market (including CtoC market), but excluding BtoB market. Total market size of sales of goods, services, digital contents and applications were calculated, excluding advertisement fees and free-of-charge services.

■ **Figure 2: Experience of Using Smart Phone Commerce**



Research conducted by YRI

Notes:

- The research was done in July 2013, targeting total 1,000 of male and female smart phone users between the age of 15 and 69. The research method was online.