



# Q1 2015

## QUARTERLY MOBILE TRENDS

Branding Brand Mobile Commerce Index

# DATA USED

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Branding Brand powers web, app, and in-store experiences for over 200 major brands. This report contains data from a sample of clients running on its platform.

WHO:

**100 Retailers**

U.S. only

WHAT:

**Mobile Sites**

No apps

WHEN:

**Q1 2015**

January - March 2015

## Q1 2015 PERFORMANCE

100 mobile sites experienced a total of 279,325,973 visits and \$233,400,979 in revenue.



**279,325,973**

VISITS

↓ 19%

Compared to Q4 2014



**\$233,400,979**

REVENUE

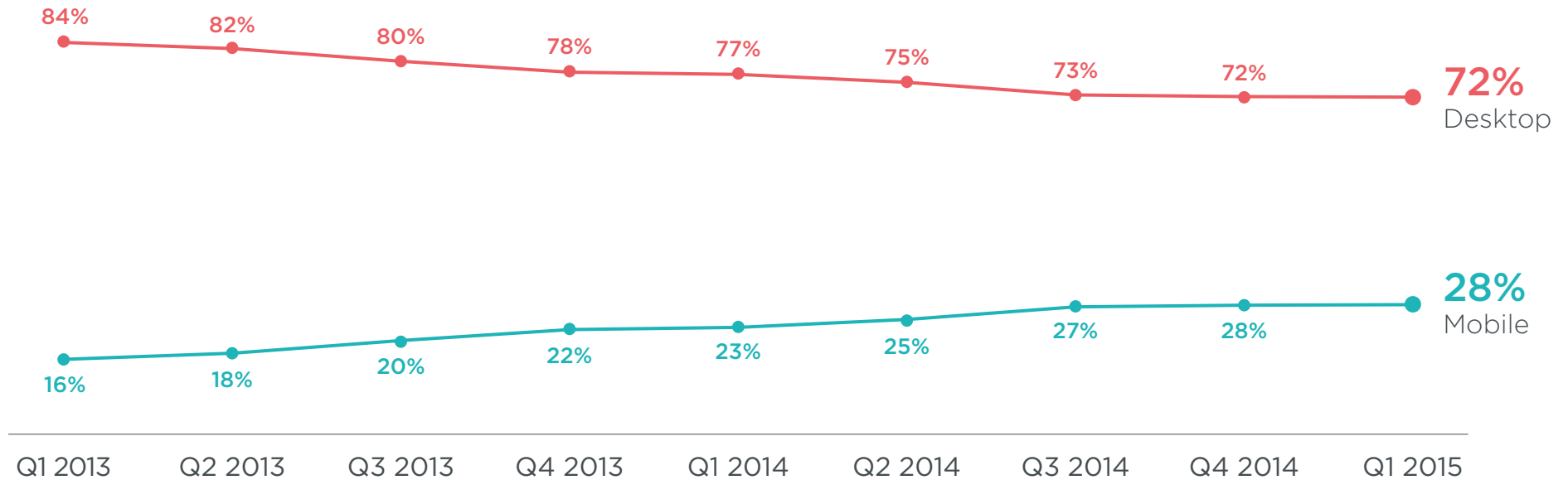
↓ 32%

Compared to Q4 2014

# REVENUE MARKET SHARE

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In Q1 2015, 28% of all online revenue was generated on a smartphone or tablet.



## QUARTER-OVER-QUARTER CHANGE IN MARKET SHARE

From Q4 2014 to Q1 2015, mobile's share of total online revenue showed no change, despite the holiday season ending.



**0%**  
Change in  
Desktop Revenue  
Market Share



**0%**  
Change in  
Mobile Revenue  
Market Share

# CONVERSION

Compared to Q4 2014, smartphone conversion decreased 4%; tablet conversion decreased 12%.

**1.03%**

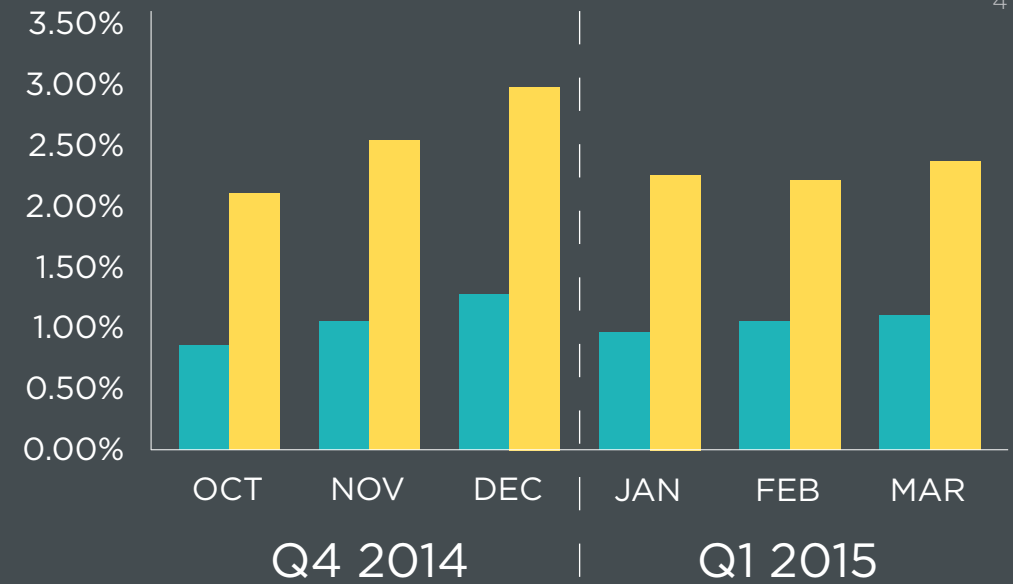
Average Q1 2015  
Smartphone Conversion

**2.27%**

Average Q1 2015  
Tablet Conversion

Smartphone

Tablet



# AVERAGE ORDER VALUE

From Q4 2014 to Q1 2015, smartphone AOV decreased 3%; tablet AOV decreased 4%.

**\$76.82**

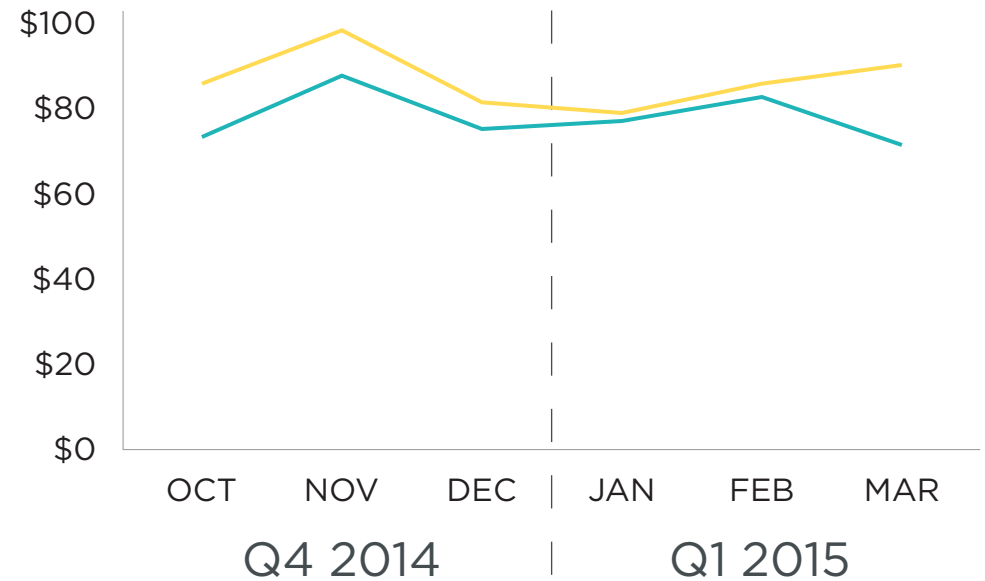
Average Q1 2015  
Smartphone AOV

**\$84.83**

Average Q1 2015  
Tablet AOV

Smartphone

Tablet

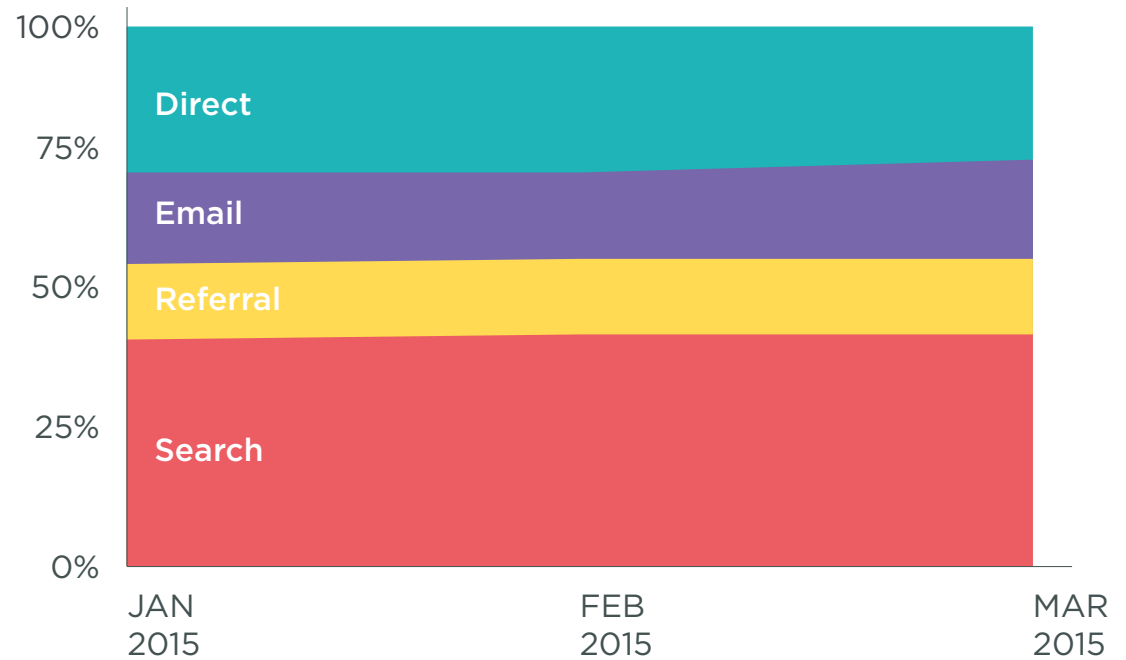


# TRAFFIC SOURCES

5

In Q1 2015, 43% of all smartphone visits arrived from Search; 27% arrived Direct.

- 27%** **Direct**  
Typing in the exact URL
- 16%** **Email**  
Landing on a page from a marketing email
- 14%** **Referral**  
Navigating from another site or advertisement
- 43%** **Search**  
Utilizing a search engine (organic and paid)



## QUARTER-OVER-QUARTER CHANGE IN MARKET SHARE

From Q4 2014 to Q1 2015, smartphone Search increased 5%; Direct decreased 7%.

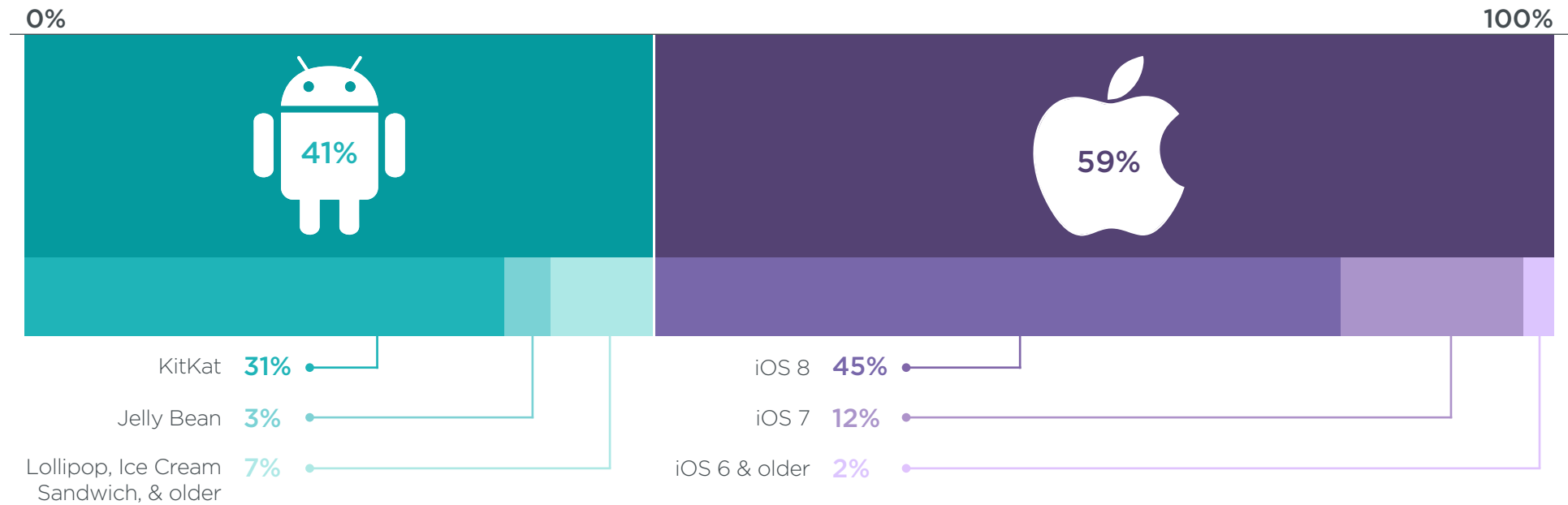


# SMARTPHONE OPERATING SYSTEM VERSIONS

6

In Q1 2015, iOS accounted for 59% of all smartphone visits; Android accounted for 41%.

## VISITS MARKET SHARE



## QUARTER-OVER-QUARTER CHANGE IN MARKET SHARE

From Q4 2014 to Q1 2015, iOS 8's share of total smartphone visits increased 30%; iOS 7's share decreased 42%.

▲ **↑ 4%**  
KitKat

▼ **↓ 25%**  
Jelly Bean

▲ **↑ 30%**  
iOS 8

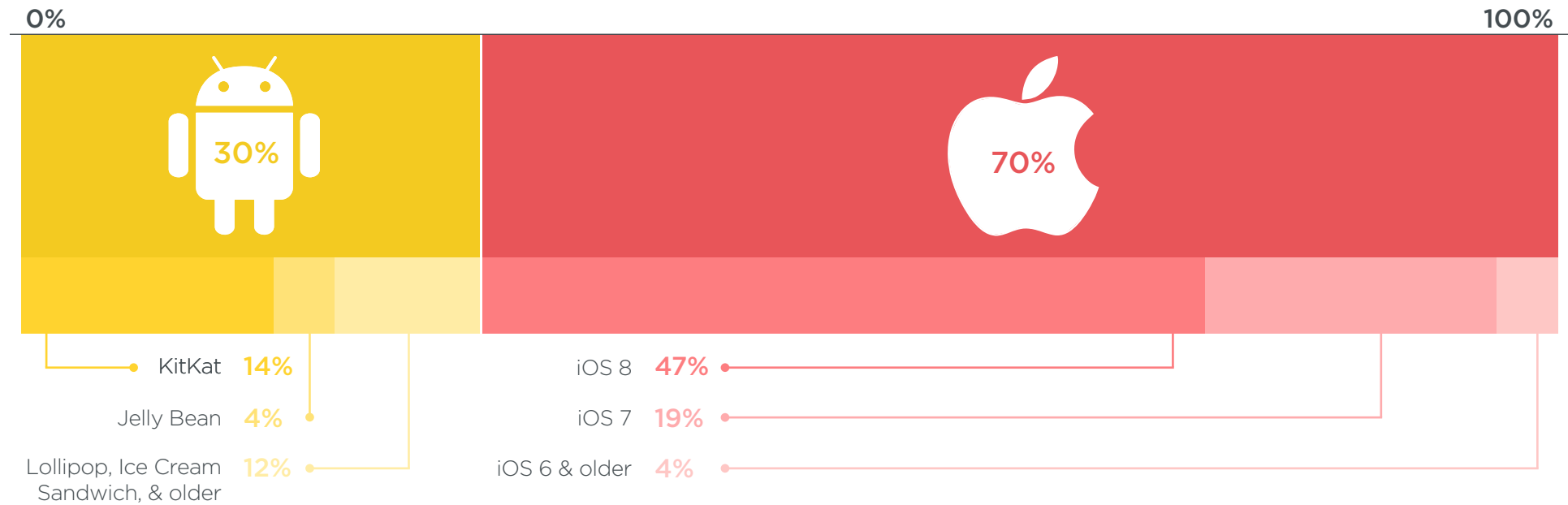
▼ **↓ 42%**  
iOS 7

# TABLET OPERATING SYSTEM VERSIONS

7

In Q1 2015, iOS accounted for 70% of all tablet visits; Android accounted for 30%.

## VISITS MARKET SHARE



## QUARTER-OVER-QUARTER CHANGE IN MARKET SHARE

From Q4 2014 to Q1 2015, KitKat's share of total tablet visits increased 38%; iOS 8's share increased 31%.

▲ **↑ 38%**  
KitKat

▼ **↓ 32%**  
Jelly Bean

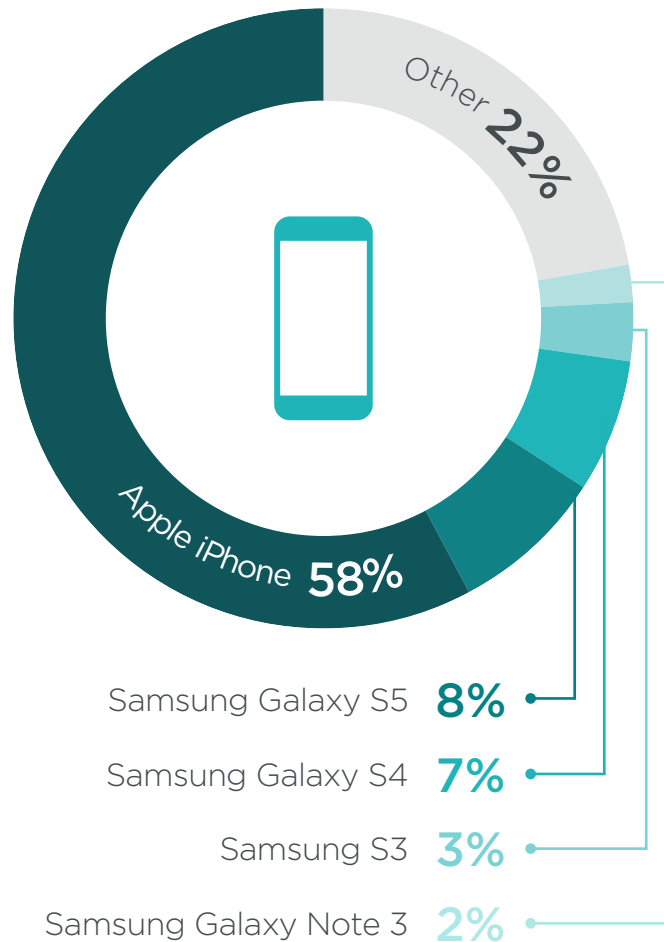
▲ **↑ 31%**  
iOS 8

▼ **↓ 37%**  
iOS 7

# TOP MOBILE DEVICES

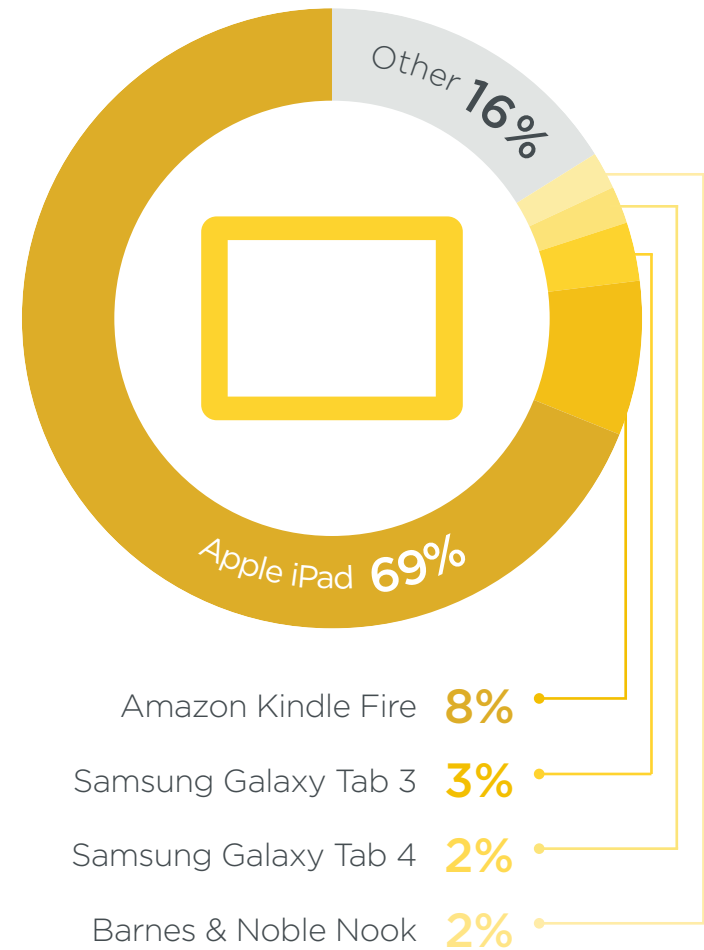
## SMARTPHONES

The top five devices accounted for 78% of total smartphone traffic.



## TABLETS

The top five devices accounted for 84% of total tablet traffic.





# QUICK FACTS

- In Q1 2015, 28% of all online revenue was generated on a smartphone or tablet. (pg 3)
- From Q4 2014 to Q1 2015, mobile's share of total online revenue showed no change, despite the holiday season ending. (pg 3)
- Compared to Q4 2014, smartphone conversion decreased 4%; tablet conversion decreased 12%. (pg 4)
- From Q4 2014 to Q1 2015, smartphone AOV decreased 3%; tablet AOV decreased 4%. (pg 4)
- In Q1 2015, 43% of all smartphone visits arrived from Search; 27% arrived Direct. (pg 5)
- From Q4 2014 to Q1 2015, smartphone Search increased 5%; Direct decreased 7%. (pg 5)
- In Q1 2015, iOS accounted for 59% of all smartphone visits; Android accounted for 41%. (pg 6)
- From Q4 2014 to Q1 2015, iOS 8's share of total smartphone visits increased 30%; iOS 7 decreased 42%. (pg 6)
- In Q1 2015, iOS accounted for 70% of all tablet visits; Android accounted for 30%. (pg 7)
- From Q4 2014 to Q1 2015, KitKat's share of total tablet visits increased 38%; iOS 8 increased 31%. (pg 7)
- The top five smartphone devices accounted for 78% of total smartphone traffic. (pg 8)
- The top five tablet devices accounted for 84% of total tablet traffic. (pg 8)

## ABOUT THE MOBILE COMMERCE INDEX

The Branding Brand Mobile Commerce Index (MCI) is the largest collection of data on retail websites specifically designed for mobile devices. Each month at [blog.brandingbrand.com](http://blog.brandingbrand.com), the Index identifies commerce and consumer trends across samples of Branding Brand clients in various industries, including apparel, health and beauty, and home goods.

In total, Branding Brand's platform powers the mobile websites and apps of over 200 major retailers around the world.