

Mobile Retail Marketing

Advertising, Coupons & NFC Shopping 2011-2016

Mobile Commerce

[Mobile Content & Applications](#)[Handsets & Devices](#)[Mobile Markets & Strategies](#)[Networks & Technologies](#)

- Latest Mobile Retail Developments
- NFC/Coupons/Advertising Forecasts
- Mobile Retail Ecosystem Explained

This report investigates various tools, techniques and mobile channels available to mobile marketers to influence the mobile shopper. NFC Shopping, Mobile Coupons and Mobile Advertising markets are analysed and supported with regional growth forecasts for each sector. The report surveys the development of the mobile retail market from the standpoint of consumer and retailer, whether in physical or online stores.

• Benefits of this report:

Quantified revenue sizing for the mobile coupons, NFC smart posters and mobile advertising markets supported by mobile coupon redemption rates, NFC smart poster downloads and mobile advertising spend per user.

Identification of new retail marketing developments including “clicks and bricks” players, NFC shopping initiatives and mobile shopping assistant apps.

Updates on 12 significant retail marketing players together with drivers and constraints for each key retail marketing sector.

Key questions the report answers:

1. What are the key strengths of mobile as a retail channel?
2. What mobile marketing strategies are used today by leading “bricks and mortar” and online retailers?
3. What are the underlying drivers and constraints of the mobile retail market and what are the emerging “game-changers”?
4. How much is the mobile retail market worth today, by how much will it grow by 2016?
5. What is the future of mobile couponing? What sort of targeting will increase redemption rates?
6. How will NFC affect the mobile shopping experience?
7. What are the primary distribution channels for mobile advertising?

To view Reports, Briefings, Whitepapers, Databases & Forecasts and many other Market Sectors, please go to:

www.juniperresearch.com



Table of Contents

Executive Summary 10

ES1 Introduction..... 10
ES2 Mobile Coupons 12
ES3 NFC Retail Marketing 14
ES4 Mobile Advertising..... 16
ES5 Mobile Retail Market Forecasts..... 18
ES6 Recommendations 20

Mobile Retail Marketing Defined

1.1 Report Scope 22
1.2 Mobile Commerce 23
 Figure 1.1: Mobile Commerce Market Segmentation..... 23
1.2.1 Mobile Payments..... 24
1.2.2 Mobile Retail Marketing..... 24
 Figure 1.2: The Retail Customer Journey 24
1.2.3 Mobile Coupons & Vouchers and Mobile Loyalty 25
1.3 The Mobile Phone as a Retail Channel 26
1.4 The Changing Customer Mobile Experience 27
 1.4.1 The Mobile Retail Channel 28
 Figure 1.3: The Mobile Device in the Retail Customer Journey..... 28
 Figure 1.4: Mobile Location Services Applied to Retail..... 28
 1.4.2 The State of Multichannel Retail Marketing 29
 Figure 1.5: Google/Ipsos Smartphone User Study - Multichannel Retail Purchase Process 29
 1.4.3 Recent Trends in the Mobile Retail Experience 30
 i. Tablets..... 30
 Figure 1.6: River Island Tablet Shopping App 30
 ii. Mobile POS..... 30
 Figure 1.7: AisleBuyer Mobile App 31
 iii. Mobile MicroStores 31
 Figure 1.8: NFC Mobile Microstore Shopping at Leclerc, Nice..... 31
1.5 The Mobile Retail Market..... 32
 1.5.1 The Evolution of the Mobile Retail Market 32
 Figure 1.9: Mobile Retail Market Evolution 32
 1.5.2 Mobile Retail Market Forecasts 33
 Figure 1.10: The Mobile Retail Opportunity (\$m) Split by Smart Posters, Coupons & Advertising 2011-2016 33

Table 1.1: The Mobile Retail Opportunity (\$m) Split by Smart Posters, Coupons & Advertising 2011-2016..... 34

Figure 1.11: The Mobile Retail Opportunity (\$m) Split by 8 Key Regions 2011-2016 34

Table 1.2: The Mobile Retail Opportunity (\$m) Split by 8 Key Regions 2011-2016..... 35

Mobile Retail Market Development

2.1 eCommerce & mCommerce Players 36

2.1.1 eBay Mobile 36

 Figure 2.1: eBay Mobile Shopping 37

 Figure 2.2: eBay Inspiration Shop..... 37

2.1.2 Amazon..... 38

 Figure 2.3: Amazon Mobile Shopping..... 38

2.2 Mobile Marketing Agencies & Loyalty Specialists 39

2.2.1 5th Finger 39

 Figure 2.4: 5th Finger In-Store Mobile Lifecycle..... 39

 Figure 2.5: RedShop Mobile Platform 40

2.3 Smartphone App Developers 40

2.3.1 ShopSavvy 40

 Figure 2.6 ShopSavvy..... 40

2.3.2 Digby 41

 Figure 2.7: Digby Rich Retailer Branded App 42

2.3.3 Shopkick..... 43

 Figure 2.8: The ShopKick App 43

 Figure 2.9: ShopKick Store Hardware..... 43

2.4 Mobile POS Vendors..... 44

2.4.1 Square 44

 Figure 2.10: Square Card Reader..... 44

2.5 Retailers & Merchants 45

2.5.1 Nordstrom 45

 Figure 2.11: Nordstrom Mobile Website 45

2.5.2 Brooks Brothers & Digby (US)..... 45

 Figure 2.12: Brooks Brothers Mobile Site 46

2.5.3 Tesco Home plus..... 46

 Figure 2.13: Tesco Home Plus Korea QR Code Campaign..... 46

2.6 Mobile Network Operators 47

2.6.1 AT&T and Digby 47

2.6.2 Telenor, Telia Denmark and Scanbuy 47

2.7 Analysis..... 48

2.7.1 Retail Shopping Channel..... 48

 Figure 2.14: Retail Shopping Channels..... 48

Figure 2.15: Retail Shopping Channels – Impact of Mobile 49

2.7.2 Mobile Retail Players..... 50

Figure 2.16: Mobile Retail Players 50

Mobile Coupons: Market Development Trends & Forecasts

3.1 Introduction 52

3.2 The Mobile Coupon in Context 53

Figure 3.1: Mobile Coupon Roles..... 53

3.3 The Mobile Coupon Ecosystem 54

Figure 3.2: Closed Loop Couponing 54

3.4 Market Trends, Drivers and Constraints..... 55

Figure 3.3: Mobile Coupon Market Trends, Drivers & Constraints 55

3.4.1 Trends 56

The Ecosystem Opportunity 56

Brands, Merchants and Retailers getting Onboard..... 56

Enter the Payments Providers..... 56

Operators Excluded? 57

Driving Towards User Loyalty..... 57

Figure 3.4: Google Wallet Home Screen..... 58

3.4.2 Drivers..... 58

i. Economic Downturn 58

ii. Convenience..... 58

iii. Social Networking..... 58

Figure 3.5: Twitter User Coupon Service..... 59

iv. Smartphone Growth & User Experience..... 59

v. The Rise of the Mobile App..... 59

Figure 3.6: iCircular Coupons App..... 60

vi. NFC Coupons..... 60

Figure 3.7: Jiepang NFC Smartposter..... 60

vii. Tablets & eReaders..... 60

Figure 3.8: Kindle Coupon 61

viii. Enhanced Security 61

ix. Paper & Online Coupon Dissatisfaction 61

x. Cost Savings & Environmental Benefits..... 61

xi. Proximity Marketing..... 62

xii. Multiple Channel Synergies 62

xiii. Instant Campaigns..... 62

xiv. Smart Targeting..... 62

Figure 3.9: Kiip Game Reward..... 63

Figure 3.10: Coupon Targeting Platform Example..... 64

xv. Smart Offers..... 64

Figure 3.11: The ‘Scratch & Save’ Coupon 64

Figure 3.12: The ‘Countdown’ Coupon 65

xvi. Higher Redemption Rates 65

3.4.2 Constraints 65

i. Privacy 65

ii. Managing the Coupon on the Phone 66

iii. POS Redemption Technology 66

iv. Marketeer & Retailer Mindset 66

v. Retailer POS Investment 67

vi. Retailer Redemption Logistics 67

vii. Success Measurements 67

viii. Over-Success & Retail Dependency 67

ix. Rural Markets 68

3.5 Mobile Coupon Market Forecast..... 69

3.5.1 Mobile Coupon User Base 69

Figure 3.13: Mobile Coupon User Base (m) Split by 8 Key Regions 2011-2016 69

3.5.2 Mobile Coupons Issued By Mobile Marketing Channel 70

Figure 3.14: Mobile Coupons Issued (%) Split by Mobile Marketing Channel 2011-2016 70

3.5.3 Total Number of Mobile Coupons Redeemed 70

Figure 3.15: Total Number of Mobile Coupons Redeemed Per Annum (m) Split by 8 Key Regions 2011-2016 70

Table 3.1: Number of Mobile Coupons Redeemed Per Annum (m) Split by 8 Key Regions 2011-2016 71

3.5.4 Total Mobile Coupon Redemption Value..... 71

Figure 3.16: Total Mobile Coupon Redemption Value (\$m) Split by 8 Key Regions 2011-2016 71

Table 3.2: Total Mobile Coupons Retail Redemption Value (\$m) Split by 8 Key Regions 2011-2016 72

3.5.5 Redemption Rate 72

Figure 3.17: Mobile Coupon Redemption Rate (%) Split by 8 Key Regions 2011-2016 72

NFC Retail Marketing: Vendors & Smart Poster Market Forecast

4.1 Introduction 74

Figure 4.1: Suipo Smart Poster 75

4.2 NFC & FeliCa Technology 76

4.2.1 Technology 76

Figure 2.1: Typical NFC Implementation 77

4.2.2 NFC Forum Interview 78

Figure 4.2: Uses of NFC 78

Figure 4.3: N Mark Logo 79

4.2.3 NFC in the Device 79

i. Embedded 79

ii. SIM 79

- 4.2.4 Interim NFC Form Factor Solutions 80**
 - Figure 4.4: Integration Phase Comparison – NFC and Mobile Broadband 80
 - i. NFC Stickers 80
 - Figure 4.5: Twinlinx My-Max NFC Sticker..... 81
 - ii. NFC SD Card..... 81
 - Figure 4.6: Giesecke & Devrient NFC SD Card 81
 - Figure 4.7: DeviceFidelity In2Pay microSD NFC Solution..... 82
 - iii. NFC Case or Sleeve for Smartphones 82
 - Figure 4.8: NFC Case for iPhone..... 82
 - iv. SIM Card Adaptations 82
 - v. NFC POS Merchant Payment Device Adaptations 83
 - Figure 4.9: VeriFone PAYware Mobile Enterprise..... 83
- 4.2.5 FeliCa 83**
 - Figure 4.10: FeliCa to Global Mobile NFC Roadmap 84
- 4.3 NFC Retail Marketing Drivers & Constraints 84**
 - Figure 4.11: NFC Drivers and Constraints..... 84
- 4.3.1 NFC Drivers..... 84**
 - i. Customer Response..... 84
 - ii. Transaction Efficiency & Growth 85
 - iii. Infrastructure Availability 85
 - iv. MNO Plans and Successes 85
 - v. Widespread NFC Applications..... 85
 - vi. Queue Busting..... 86
 - vii. One to One Marketing..... 86
 - viii. Smartphone Growth 86
- 4.3.2 NFC Constraints 86**
 - i. Device Availability 86
 - ii. POS Acceptance 87
 - iii. User Support..... 87
- 4.4 NFC Market Development..... 88**
 - 4.4.1 Regional Prospects..... 88**
 - Figure 4.12: Market Development Prospects 2011-2012 for 8 Key Regions 88
 - 4.4.2 Selected NFC Retail Market Players 88**
 - i. Telefonica, Visa Europe & La Caixa (Spain)..... 89
 - Figure 4.13: Sitges Mobile Shopping 89
 - ii. Ingenico..... 90
 - Figure 4.14: Ingenico Tellium Pass Plus NFC POS Terminal..... 90
 - iii. VeriFone 90
 - Figure 4.15: VeriFone VX Evolution POS Device 90
 - iv. More Magic 91
 - v. Think&Go NFC 91

- vi. ViVOtech 92
- 4.5 NFC Smart Poster Market Forecast 93**
- 4.5.1 Smart Poster Product Information Download Forecast 93**
- Figure 4.16: Total Number of NFC Smart Poster Downloads (m) Split by 8 Key Regions 2011-2016..... 94
- Table 4.1: Total Number of NFC Smart Poster Downloads (m) Split by 8 Key Regions 2011-2016 94
- 4.5.2 NFC Smart Posters Total Fee Value..... 94**
- Figure 6.6: NFC Smart Posters Total Fee Value (\$m) p.a. Split by 8 Key Regions 2011-2016 95
- Table 6.4: NFC Smart Posters Total Fee Value (\$m) p.a. Split by 8 Key Regions 2011-2016..... 95

Mobile Advertising: Campaigns & Market Forecast

- 5.1 Introduction 96**
- 5.2 Mobile Advertising Campaigns 97**
- 5.2.1 SMS Advertising Campaigns 97**
- 5.2.2 MMS Advertising 97**
- i. Operators Move Towards Targeted, Opt-in Messaging 98
- 5.2.3 In-Content Download Advertising 99**
- i. In-App Video Advertising..... 99
- a. Case Study: Coke Zero Facial Profiler 99
- ii. Mobile TV and Video Advertising..... 99
- 5.2.4 On-Portal Advertising..... 100**
- i. Banner Advertising 100
- ii. Mobile On-Portal Search 100
- 5.2.5 Ringback Tone Advertising 101**
- 5.2.6 Apps as Advertising..... 101**
- 5.2.7 Mobile Internet Advertising 102**
- 5.2.8 Idle Screen Advertising..... 103**
- i. Case Study: Ford Taurus..... 103
- 5.3 Mobile Advertising Drivers & Constraints 104**
- 5.3.1 Drivers of Mobile Advertising 104**
- i. Audiences for Traditional Media Are Diminishing 104
- ii. Brands Are Increasingly Pursuing Below The Line Strategies 104
- iii. Digital Budgets Are Increasing 105
- iv. Mobile is Personal..... 105
- v. The Rise of the Smartphone 105
- vi. The Rise of the App Store..... 106
- vii. Increasing Mobile and 3G Penetration..... 107
- Table 5.1: Relative Reach of UK Media 2010 107
- viii. ...Leads to Greater Mobile Internet Adoption 107
- ix. ... And Creates Exposure Opportunities 108

- a. Case Study: Barclaycard Waterslide Extreme 108
 - Figure 2.1: Fishlab’s Barclaycard-Branded Waterslide Extreme on the iPhone 108
- x. The Rise of M-Commerce 109
- xi. The Rise of Mobile Social Networking and Web 2.0 109
- xii. Mobile Offers Location Awareness 110
- xiii. Opt-In 110
- xiv. Advanced Targeting 111
- xv. Mobile Can Offer Detailed Metrics 111
- xvi. Response Rates 111
- 5.3.2 Constraints on Mobile Advertising Growth 112**
 - i. Privacy 112
 - ii. Fragmentation 112
 - iii. Lack of Optimisation 113
 - iv. An App Is Not A Strategy! 113
 - v. Customer Retention 113
 - vi. Handset Dimensions 114
 - vii. Cost of Data Services 114
 - viii. Reach/Visibility 114
 - ix. Need for Converged/Planned Campaigns 115
 - x. Relevance 115
 - xi. Spam 115
- 5.4 The Market for Mobile Advertising 116**
 - 5.4.1 Mobile Advertising in the Economic Downturn 116**
 - i. Expectations for Mobile Advertising 117
 - 5.4.2 Market Development: Key Assumptions by Mobile Distribution Channel 117**
 - i. SMS/MMS Advertising 117
 - ii. MMS Advertising 117
 - iii. In-Content Download Advertising 118
 - iv. Mobile Internet Advertising 118
 - a. Mobile Internet Search Advertising 119
 - v. Idle Screen Advertising 119
 - vi. Ringback Tone Advertising 119
 - 5.4.3 Total Mobile Advertising Expenditure: Current Market & Forecasts 119**
 - Figure 5.9: Total Mobile Adspend (\$m) Split by 8 Key Regions 2011-2016 120
 - Table 5.2: Total Mobile Adspend (\$m) Split by 8 Key Regions 2011-2016 120
 - Figure 5.10: Adspend (\$) Per Mobile Handset per Annum Split by 8 Key Regions 2011-2016 121
 - Table 5.3: Adspend (\$) Per Mobile Subscriber Per Annum Split by 8 Key Regions 2011-2016 121
- Glossary 122**



To place your order

Product Details

Mobile Retail Marketing:
Advertising, Coupons & NFC Shopping 2011-2016

Please select your requirements	£	\$	€	PDF	Hard Copy
Single User License	1,750	2,840	1,990	<input type="checkbox"/>	
Multi User Network License (2-5 users)	2,500	4,050	2,840	<input type="checkbox"/>	
Enterprise Wide License (all organisation)	3,750	6,080	4,260	<input type="checkbox"/>	
- add additional hardback copy	190	390	280		<input type="checkbox"/>
- add trackable courier delivery*	40	60	50		<input type="checkbox"/>

Account Services - For further information contact jess.hanslip@juniperresearch.com.

Order Online or by Email:

Web: www.juniperresearch.com
Email: info@juniperresearch.com

or Post or Fax your order to:

Juniper Research Limited, Church Cottage House, Church Square, Basingstoke, Hampshire RG21 7QW England
Tel (UK): +44 (0) 1256 830001/475656
Tel (US): +1 408 716 5483
Fax: +44 (0) 1256 830093

Euro & US\$ prices are for guidance only. The exact price will depend upon your bank exchange rate (to the £) on the day of order processing. Prices do not include VAT - charged at prevailing rate in the UK.

*Standard Courier Delivery is Free

Companies included in this report

5th Finger • Aircel • Amazon • Apple • Aruba Networks • AT&T • Augme Technologies • Aurora Fashions • BBC • Belle Tire • Best Buy • Blockbuster • Blyk • BP • Brooks Brothers • BSNL • BT • Citi • Clear Channel • Coca Cola • Comet • Commidea • Coors Brewers • CouponCabin • Day's Inn • DeviceFidelity • Digby • Eagle Eye Solutions • eBay • Facebook • Fancharge • FeliCa • Fishlabs • Ford • Gemalto • Giesecke & Devrient • Google • Groupon • Hipcricket • Hypertag • IMLmobile • i-movo • Ingenico • JAGTAG • Jo-Ann Fabric and Crafts • John Lewis Partnership • JoS. A. Bank • Karen Miller • KFC • Kiip • LivingSocial • Macy's • MasterCard • Mcdonalds • Meteor • Microsoft • MillerCoors • Millicom • Milo • Mobiqua • Mobitel • Movaya Wireless • MTN • Plus many more...

Author Profile

David Snow is a Senior Analyst with Juniper Research and heads up the Mobile Commerce stream. He has over thirty years' experience in the fixed and mobile telecommunications industry and has previously worked as a Senior Analyst focusing on market, strategic and competitive intelligence, first for Marconi Corporation, and then for Ericsson AB.

David has a BSc in Physics from Bristol University and an MSc in Telecommunications Technology from Aston University.

Other reports available



Mobile Coupons
Ecosystem Analysis & Marketing Channel Strategy 2011-2016



Mobile Social Media
Networking, Dating & Virtual Goods 2011-2016



Mobile Publishing
eBooks, eMagazines & eNewspapers for Smart Devices 2011-2016



Tablet & eReader Evolution
Strategies & Opportunities 2011-2016



Mobile Network Backhaul
Challenges, Opportunities & Markets 2011-2016



Mobile Voice & Video Calling
Strategic Opportunities & Business Models 2011-2016

Our background

Juniper specialises in identifying and appraising new high growth market sectors within the mobile ecosystem. Market sizing and forecasting are the cornerstones of our offering, together with competitive analysis, strategic assessment and business modelling. We endeavour to provide independent and impartial analysis of both current

and emerging opportunities via a team of dedicated specialists - very knowledgeable, experienced and experts in their field.

Juniper's client base spans the globe, with the majority of its clients in North America, the Far East and Europe.

Juniper Research Limited

Church Cottage House, Church Square, Basingstoke, Hampshire RG21 7QW England.

Email info@juniperresearch.com

Telephone UK: +44 (0) 1256 830001/475656

US: +1 408 716 5483 (International answering service)

Fax UK: +44 (0) 1256 830093