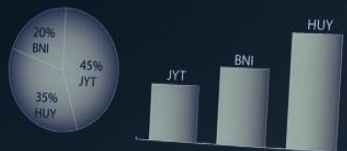


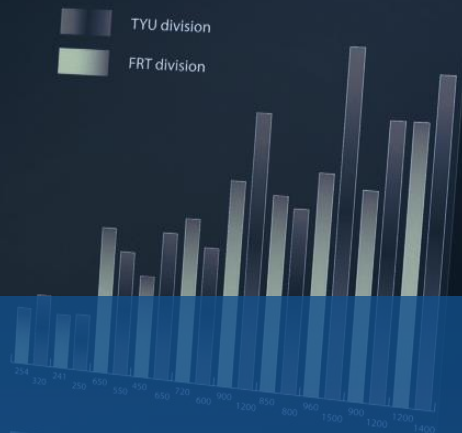
MOVR

Mobile Overview Report April-June 2014

Distribution marketing participation in the securities market.



Revenue growth divisions.



Distribution of the securities market key players



	TYU division		FRT division	
GHT	254	550	254	154
RDW	650	320	273	415
TRG	241	450	759	825
RTG	254	650	144	154
WEF	784	145	874	954
HRT	453	784	124	741

Executive Summary – Western Countries

Form Factor



- Smartphones still dominate mobile traffic (65%).

Manufacturer



- Apple (39%) and Samsung (30%) are the clear leaders in smartphones.

Top 10 Devices



- Apple's iPhone 5, 5S, 4S and 4 models hold the first, second, fourth, and sixth spots and generate 36% of smartphone traffic.
- Samsung's Galaxy S and Note products make up 5 of the top 10 models.

OS



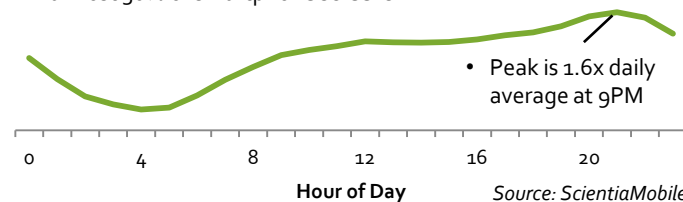
- Android represents 56% of hits, with Apple at 38%.
- Over 85% of Android hits come from release 4 or above, but they are fragmented across 5 different release versions.
- iOS has less fragmentation, with 69% of usage on a single release, iOS 7.1.

Screen



- Apple's iPhone 5, 5S, 5c screen size (640x1136) is the most popular (29%).
- High res screens (1920x1080 and 1280x720) account for almost 30% of smartphone screens.

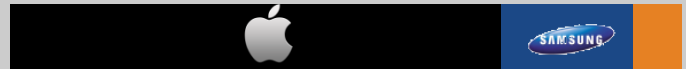
Peak Hour



- Peak is 1.6x daily average at 9PM



- Tablets are a growing source of traffic in Western Countries (33%).
- Feature phones account for the remaining 2% of traffic.



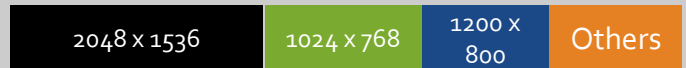
- Apple is the largest tablet manufacturer by far, with 73% of traffic.
- Samsung, with 13% of hits, is the second largest.



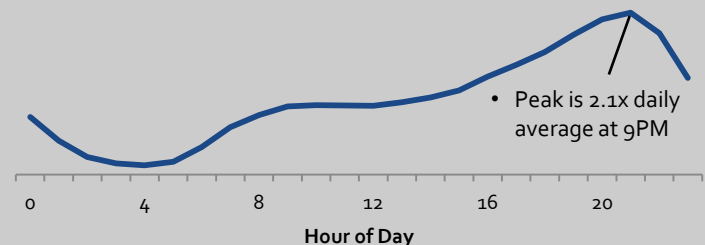
- The iPad 2 holds the top position with 14% of tablet usage. Apple holds 6 of the top model positions.
- Google's Nexus 7 is the lone competitor to Apple and Samsung to appear in the top 10.



- Apple continues its tablet dominance (73%), with Android accounting for only 26% of tablet OS.



- iPad's Retina displays (2048 x 1536) hold the top position with 42% of tablet traffic.



- Peak is 2.1x daily average at 9PM

Report Specifications

- **Purpose of Report**

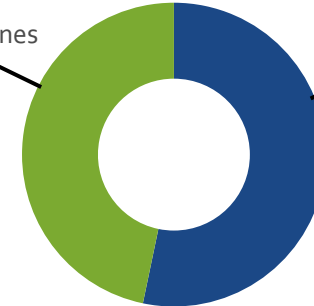
- ScientiaMobile has published MOVR to provide the mobile Web community with timely information on mobile Web device usage.
- We hope to stimulate interest in mobile device trends, device capabilities, and tools for analyzing and managing device fragmentation.

- **Sources of Data and Filtering**

- The information in this report is based on a representative sample of a larger data set. The sample size is 415 million requests from April 2014 to end of June 2014. To date, the complete data set averages at ~500 million UA requests per month.
- MOVR focuses on mobile devices, consisting of smartphones, tablets, and feature phones.
- While the dataset includes desktops, laptops, smart TVs, game consoles, apps, and robots, we have excluded them.
- To download the data files supporting MOVR, or subscribe to future publications of MOVR, please visit us at www.scientiamobile.com/page/movr-mobile-overview-report

Included

- Smartphones
- Tablets
- Feature Phones



Excluded

- Desktops and laptops
- Smart TV
- Game Consoles
- Apps
- Robots

Definitions

- **What is a Hit?** Each time a user visits a Web page and a UA is generated and tested by WURFL (through a number of mechanisms), a “hit” is recorded in the ScientiaMobile dataset. All data reported in MOVR reflects hits, **not** the count of physical devices generating the hit.
- **What is a smartphone?** A smartphone must meet several criteria, including that it should be a wireless device, have a touch screen with horizontal resolution greater than or equal to 320px, and not be considered a tablet.
- **What is a tablet?** Criteria for a tablet include: a wireless device, larger than 6”, and running a mobile or tablet OS. One exception is that a full version of Windows on running on a tablet is considered to be a laptop.

Definitions (continued)

- **What is a feature phone?** It is a wireless device that falls into one of the three categories: classic feature phones, modern feature phones, and old smartphones
 - **Classic feature phone:** Typically a bar, slide or clamshell form factor with limited possibilities to install apps and a proprietary OS. Other criteria include a physical keyboard and a low price range. Examples are Nokia Series 30 and 40 or Motorola Razr devices.
 - **Modern feature phone:** These phones also have a low price range. They are “smartphone-like”, but targeted at the classic feature phone market. They may have a smartphone OS. They borrow features from classic feature phones, such as size or screen size. Examples are Nokia Asha series or Samsung Galaxy Pocket.
 - **Old smartphones:** These smartphones are older than 3 years and were high-end devices when launched. Classic Blackberry devices and Symbian-based devices fall in this category. Likewise, more recent devices with a touch screen, but with older hardware or older versions of Android, iOS or Windows Phone also fall in this category.
- **What countries make up the Western Countries region?** North America, South America, Europe and Oceania are within our definition of Western Countries. We found that many of the dynamics of the Asian market were significantly different than most of the Western Countries. This geographic grouping provides a way to illustrate the similarities and differences between these markets.

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**Western Countries
Relative To Asia**



How Does Device Form Factor Drive Mobile Web Usage?

Western Countries

- Smartphones represent the largest contributor to hits from mobile devices, generating over 65% on most weekdays.
- In second place, tablets generate over 30% and are growing.
- Feature phones generate 2.3% of traffic.
- Tablets are growing in popularity, but their usage tends to correlate with leisure periods, on weekends and evenings.
- Usage peaks for tablets on Sunday evenings, at slightly over 37% of all mobile hits during that day.

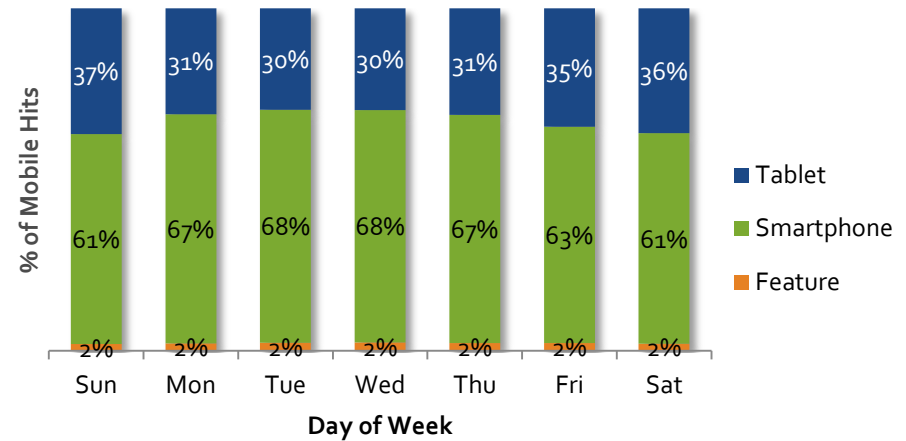
Asia

- Smartphones generate almost 90% of traffic, with tablets accounting for only 7%.
- Feature phone is 3.8% of traffic in Asia.

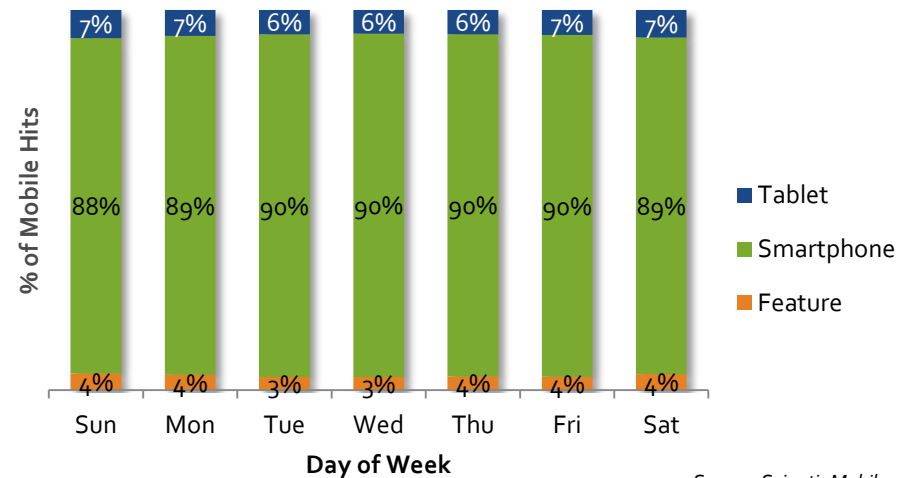
Key Comparisons

- Tablet usage in the West is over triple that found in Asia.
- Feature phones, while slightly more prevalent in Asia, remain low, below 5%.

Western Countries



Asia



Source: ScientiaMobile



Smartphone: Which Manufacturer's Devices Drive Usage?

Western Countries

- In Western Countries, Apple is the largest smartphone manufacturer by usage with 39%. This is driven primarily by its dominance in N. America where it generates over 52% of smartphone hits
- Samsung holds a considerably lower second place at 30%.
- Other smaller manufacturers fail to break 10%.

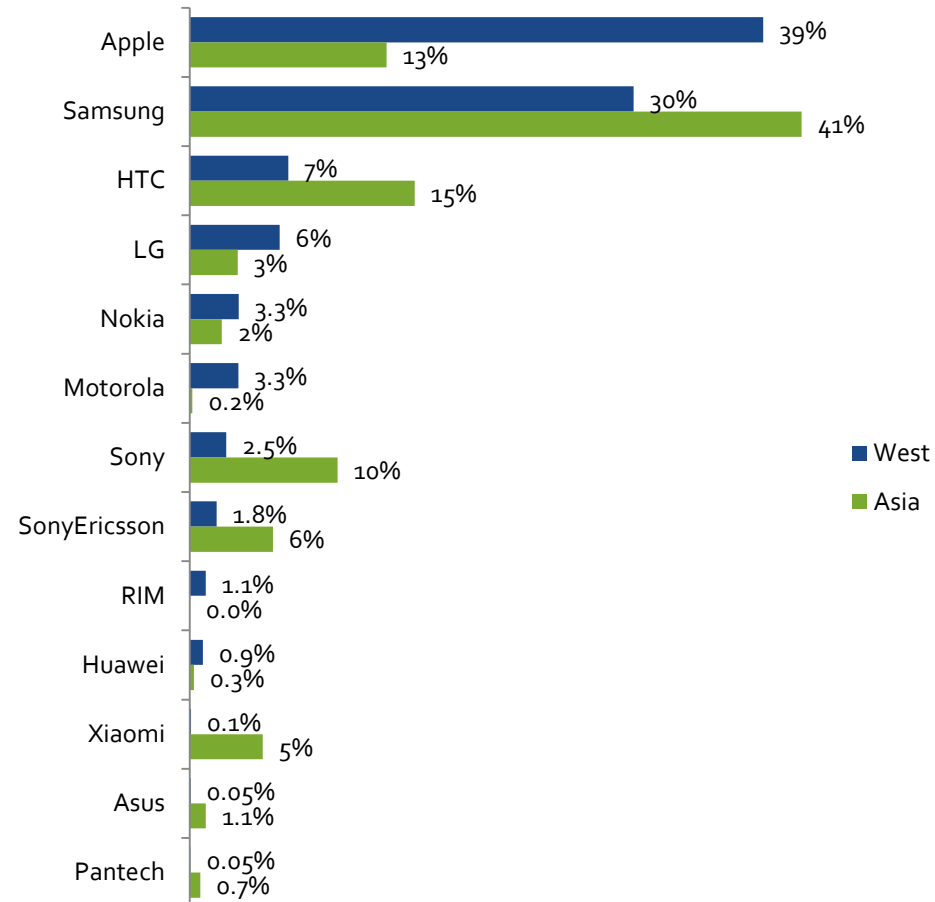
Asia

- In Asia, Samsung holds a substantial first place lead with 41%. HTC (15%), Apple (13%) and Sony (10%) compete evenly, with all of them surpassing the 10% level.

Key Comparisons

- Apple has a strong advantage in Western Countries which has not been replicated in Asia.
- Android manufacturers, as a group, hold a significant edge in Asia.
- Asian manufacturers like Xiaomi have significant shares in Asia, but have not penetrated the Western Countries.

Smartphone Manufacturer



Source: ScientiaMobile

% Smartphone Hits



Tablet: Which Manufacturer's Devices Drive Usage?

Western Countries

- Apple is the largest tablet manufacturer by far with 73% of hits.
- Samsung is a distant second with 13%.
- Several other Android device manufacturers and Microsoft tablets make up the remaining portion.
- Reader-oriented tablets from Amazon and Barnes and Noble also appear in the top 10.

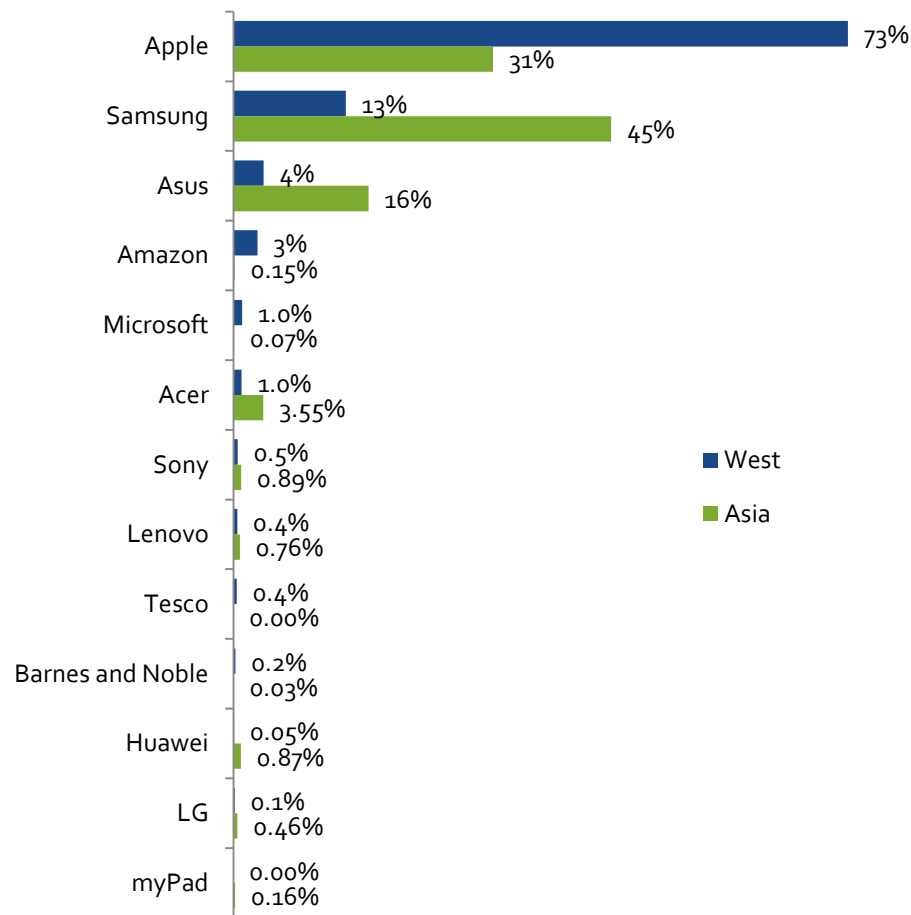
Asia

- Samsung (45%) has a lead over Apple (31%).
- In third place, Asus generates 16% of traffic from its own branded devices and Google's Nexus 7.

Key Comparisons

- Today, tablets currently have only 2-3 significant manufacturers worldwide.
- While Apple dominates the Western markets, Android tablet manufacturers, as a group, hold a lead over Apple in Asia. Nevertheless, Apple's 31% share of Asia shows a strong presence.

Tablet Manufacturer



Source: ScientiaMobile



Smartphones: What Are The Top Models By Usage?

Western Countries

- Apple's iPhone 5, 5S, 4S, and 4 models hold the first, second, fourth, and sixth spots. Collectively, they generate 36% of smartphone traffic.
- Samsung's Galaxy S and Note products make up 5 of the top 10 models.
- HTC One is the only non-Apple or Samsung model in the top 10.

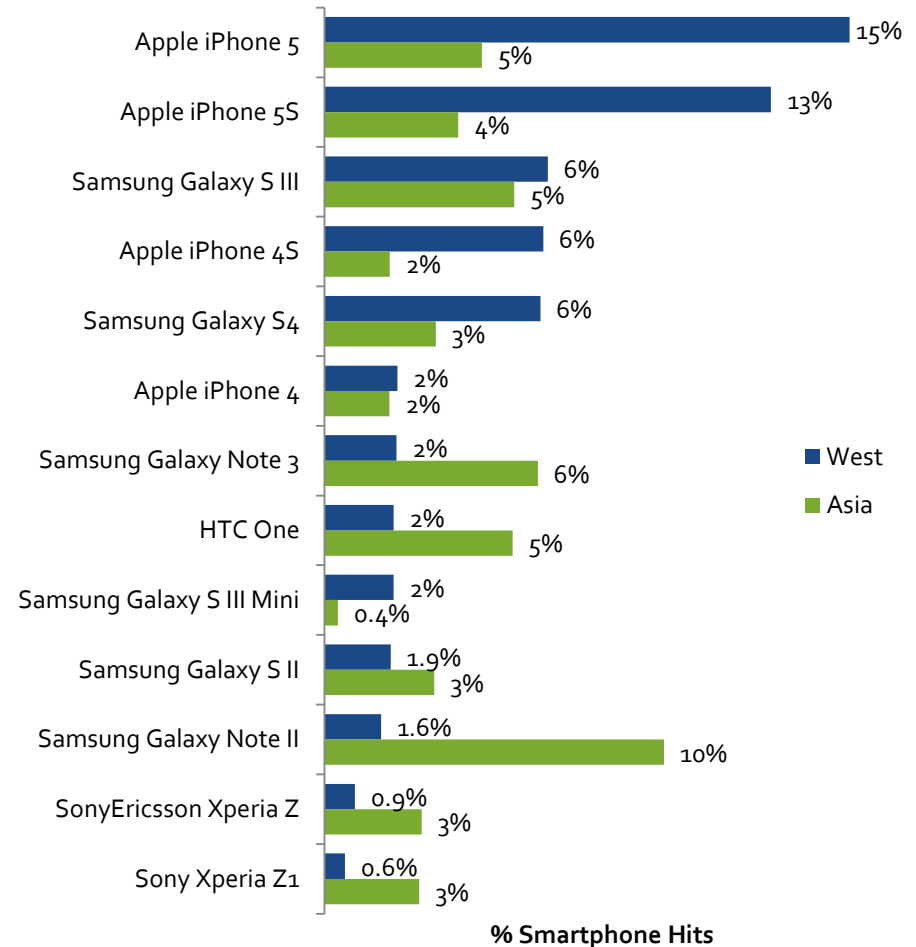
Asia

- Larger-dimension Samsung models (Galaxy Note II and Note 3) hold the top Asian positions.
- Samsung smartphones hold 4 of the Asian top 10.
- Apple iPhones (5S, 5, 4S) hold 3 of the top 10 positions.
- Sony and HTC make up the remaining positions.

Key Comparisons

- Apple's hit phones in the West are still popular in Asia, but do not dominate in the same manner.
- Asia's top devices show a preference for large handsets.
- While they are nearly shut out in Western Countries, HTC One and Sony's Xperia models fare better in Asia.

Top Smartphone Models



Source: ScientiaMobile



Tablets: What Are The Top Models By Usage?

Western Countries

- Apple's iPad models hold all of the top 6 positions, with the older iPad 2 still holding the top position with 14% of traffic.
- Samsung has 2 tablet models of different dimensions in the Top 10.
- Google's Nexus 7 is the lone competitor to Apple and Samsung that appears in the top 10. This model represents 2 generations of the Nexus 7, approximately evenly split.

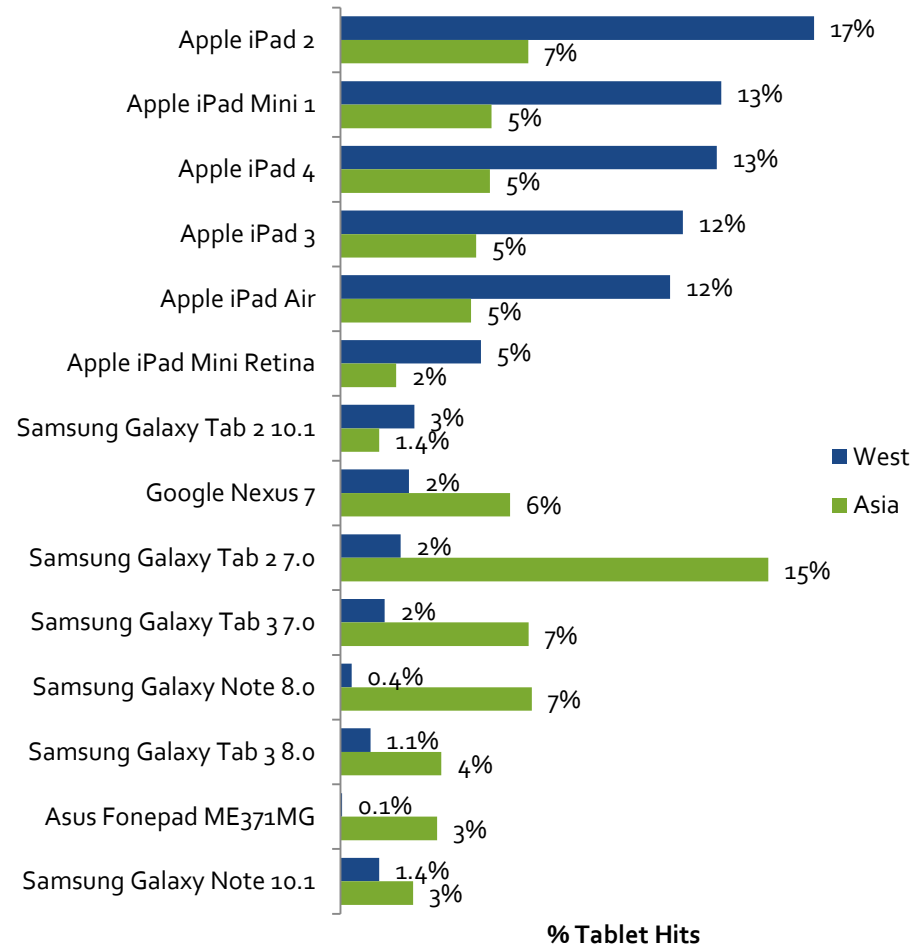
Asia

- 7 and 8 inch models from Samsung, Google, and Apple are popular, with the Samsung Galaxy Tab 2 7.0 holding the top position (15%).
- Samsung and Apple dominate the top 10 with multiple models across an array of sizes.

Key Comparisons

- Apple and Samsung have very similar arrays of models.
- Apple swaps leadership in the West with Samsung in the East.

Top Tablets



Source: ScientiaMobile



Spotlight: Apple Traffic by Model

Western Countries

- iPhone 5 and 5S models account for almost 75% of total iPhone traffic.
- The newer iPhone 5C generates only 2% of iPhone traffic currently.

Asia

- iPhone 5 and 5S models account for over 75% of traffic.

Key Comparisons

- The proportion of iPhone usage is very similar in Western Countries vs. Asia.

Western Countries

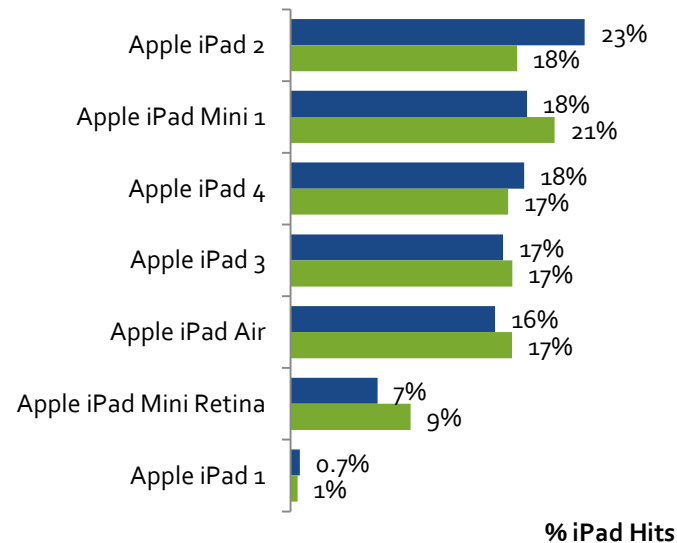
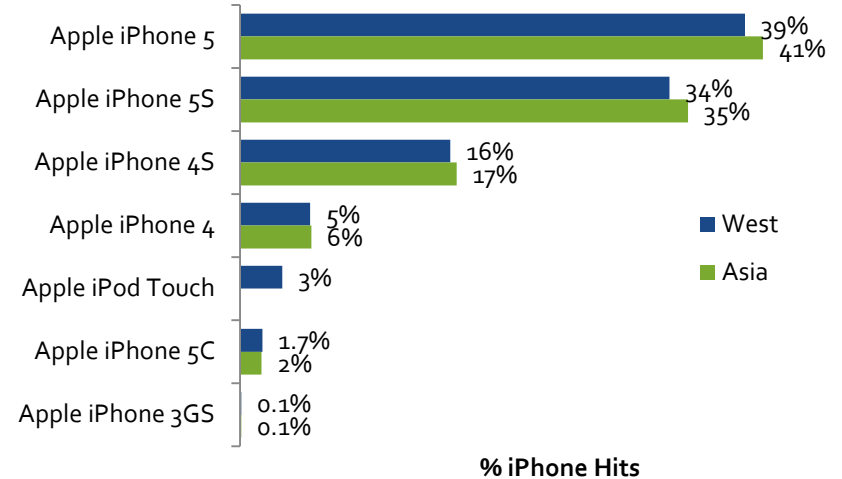
- iPad 2 generates the largest share of traffic at 23%.
- Traffic is evenly distributed over many iPad models

Asia

- iPad Mini 1 is the most popular Apple tablet, showing Asia's slight preference for using a smaller tablet.

Key Comparisons

- While the iPad2 and Mini 1 have slightly different shares in Western Countries vs. Asia, the remaining iPad usage figures are very similar across regions.

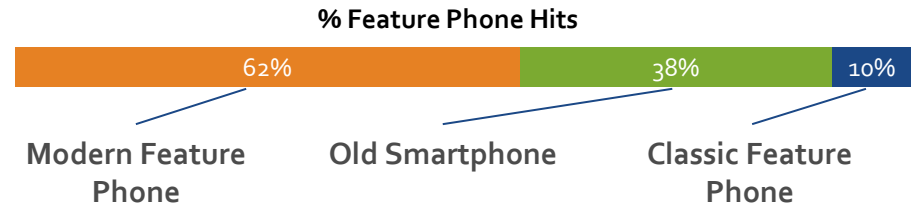


Source: ScientiaMobile



Feature Phones: Long Tail Persists

- For developers who want to ensure all mobile device users have a great experience, serving the long tail of feature phones remains important. While feature phones are a relatively small portion of overall traffic (2.3% in Western Countries and 3.8% in Asia), they contribute to the fragmented device environment that mobile Web developers must consider.
- Modern Feature Phones generate most of the Web traffic (62%).
- As the core smartphone category evolves, older smartphones are placed among the Feature Phones. These older smartphones still drive a significant amount of traffic (38%).
- Classic Feature Phone traffic is low (10%).
- In this quarter's data, we saw over 900 models feature phones using the mobile Web, with traffic very broadly distributed amongst those models.
- Comparing top models in Western Countries vs. Asia, there are very few models that recur. This reflects the regional diversity of the Feature Phone market.



Western Countries

- | | | |
|---------------------|----------------------------|---------------------|
| 1. LG Optimus Zone | 1. SonyEricsson Xperia X10 | 1. Nokia C2-01 |
| 2. LG Optimus Logic | 2. HTC Wildfire | 2. Samsung Convoy 2 |
| 3. Samsung Galaxy Y | 3. LG Optimus Dynamic | 3. Samsung Dart |
| 4. HW M835 | 4. RIM Torch | |
| 5. LG Optimus L3 | 5. RIM Curve | |

Asia

- | | | |
|--------------------------|---------------------------|----------------|
| 1. Samsung Galaxy Y | 1. Nokia XpressMusic | 1. Nokia X2-01 |
| 2. Nokia Asha 311 | 2. SonyEricsson Xperia X8 | 2. Nokia C3-00 |
| 3. Samsung Galaxy Y Duos | 3. RIM BlackBerry 9780 | 3. Nokia C2-01 |
| 4. Samsung Galaxy Mini | | 4. Nokia 206 |
| 5. Nokia Asha 501 | | 5. Nokia X2-02 |

Source: ScientiaMobile



Smartphone: Market Share by Operating System

Western Countries

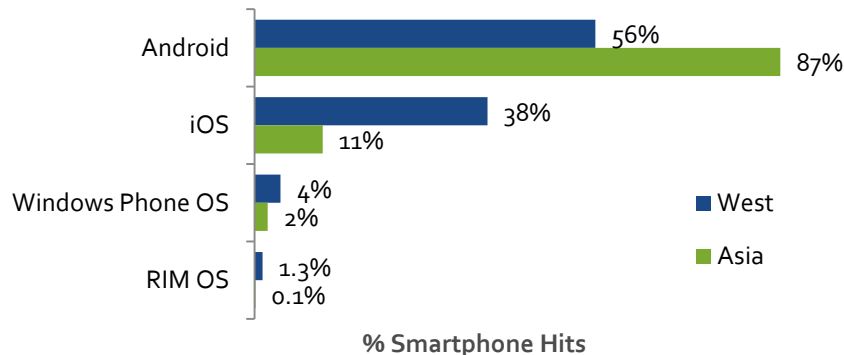
- Android has the largest share of Smartphone hits, with 56%.
- iOS is the second largest, with 38%.
- Android has a very fragmented base of releases. While over 86% of users are on at least release 4, they are widely distributed across 4.0 up to 4.4.
- iOS has less fragmentation, with 69% of usage on a single release, iOS 7.1.
- While Apple has been very successful in pushing release updates, 11% of usage still occurs on release 6.1 or before.

Asia

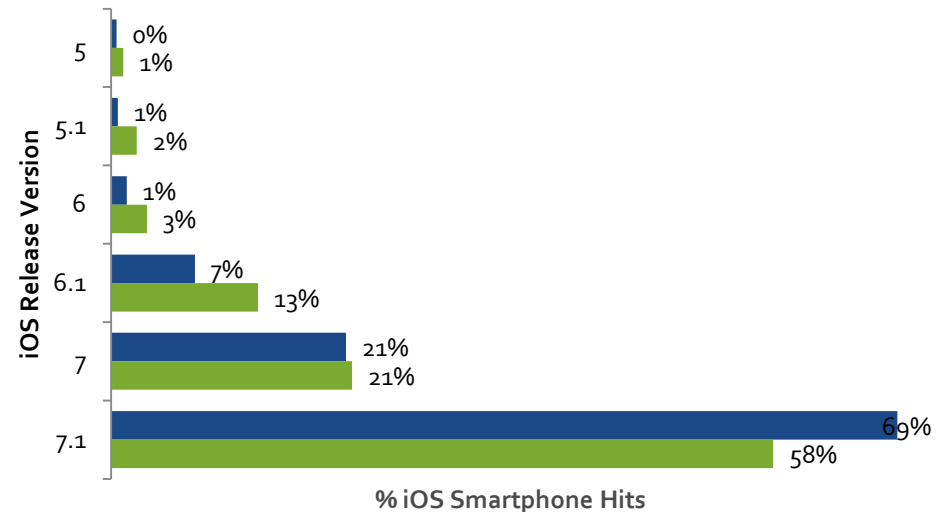
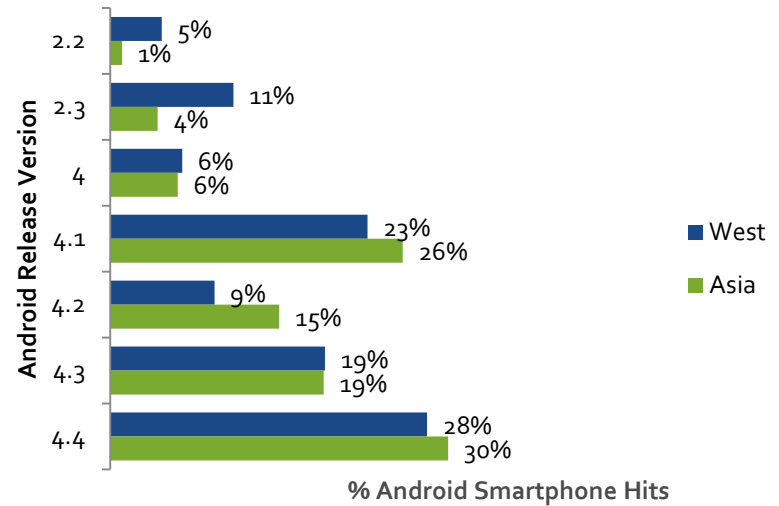
- Asia has a much stronger adoption of Android (87%) vs. iOS (11%)

Key Comparisons

- Fragmentation among release versions is similar, but fewer Asian iOS users have upgraded to version 7 or above



Source: ScientiaMobile



Source: ScientiaMobile



Tablet: Market Share by Operating System

Western Countries

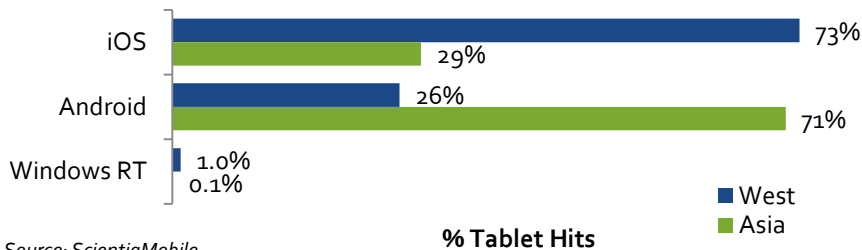
- iOS continues to dominate the OS market for tablets with 73%.
- Similar to smartphones, Apple has succeeded in pushing release updates, with 88% of users on version 7 or above.
- Android has greater fragmentation, with release 4.2 accounting for the largest share (38%).
- Only 12% of hits come from Android tablets running the most recent release 4.4.

Asia

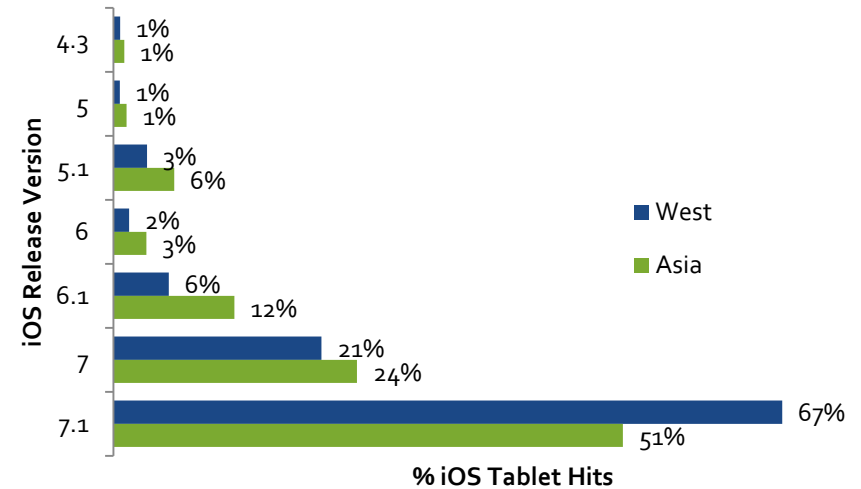
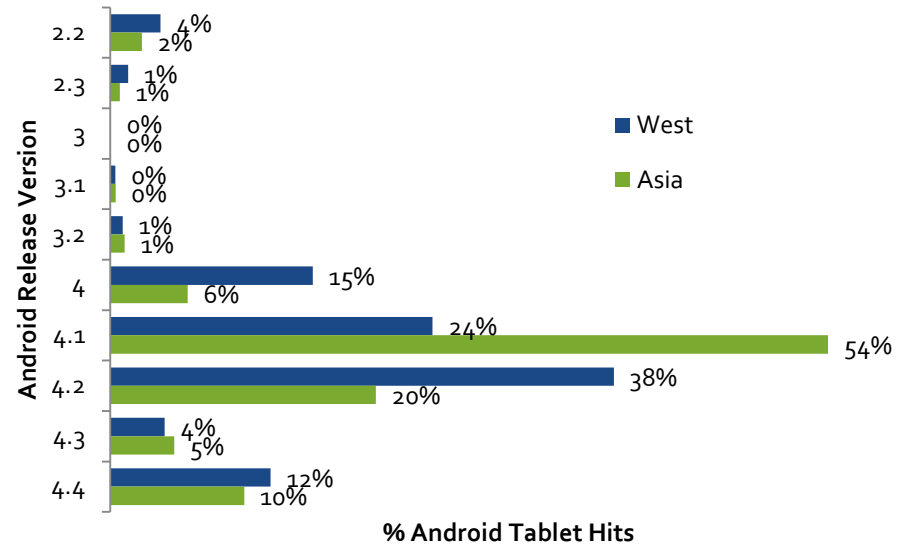
- Asia has a much stronger adoption of Android (71%) vs. iOS (29%).

Key Comparisons

- Android fragmentation in Asia is less severe, with most users on 4.2.
- Fewer Asian iOS users have upgraded to version 7 or above.



Source: ScientiaMobile



Source: ScientiaMobile



Smartphones: What Browsers are Used?

Western Countries

- The Android Webkit and Apple Safari browsers shipped on the devices are the most common browsers.
- Chrome, IE Mobile, Blackberry, Firefox Mobile, and Opera are showing up, but in much smaller numbers.

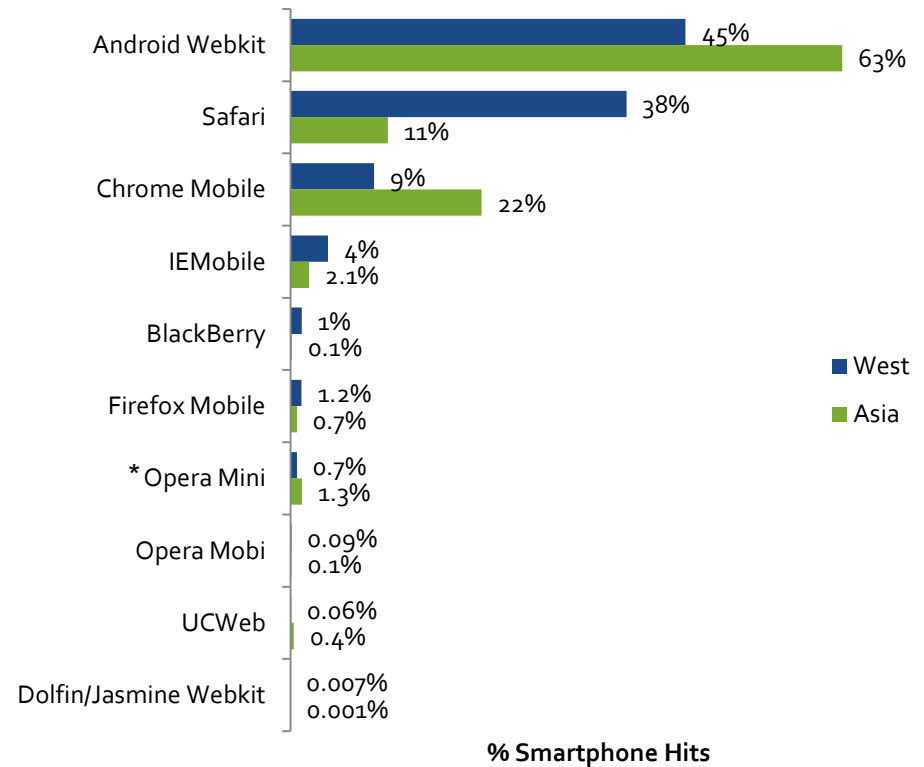
Asia

- Asia's higher Android usage drives higher Android Webkit and Chrome Mobile usage.

Key Comparisons

- In both markets, very few non-stock browsers appear.

Top Smartphone Browsers



Source: ScientiaMobile

* Due to known issues in our data sampling method, the Opera Mini statistics have a higher error margin relative to other browsers listed here. The figures for Opera Mini represent a reasonable estimate, based on a different sample than the rest of the browsers.



Tablets: What Browsers are Used?

Western Countries

- The Apple Safari and Android Webkit browsers shipped on the devices are the most common browser.
- Microsoft and Fennec are appearing, but with only 1% of traffic.

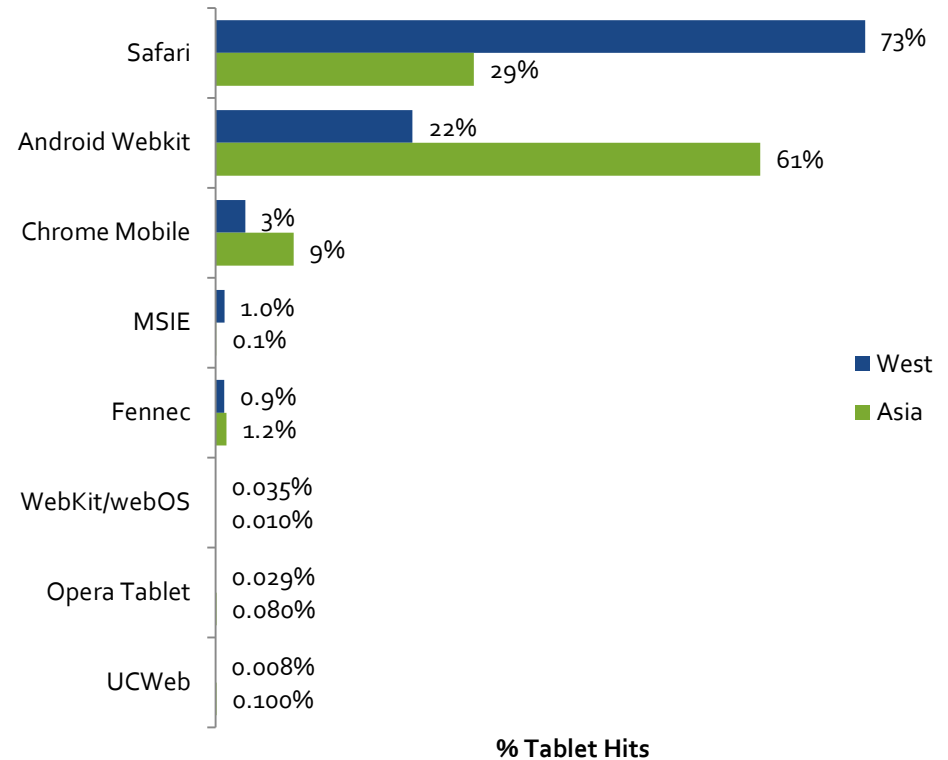
Asia

- Asia's higher Android usage drives higher Android Webkit and Chrome Mobile usage.

Key Comparisons

- In both markets, very few non-stock browsers are showing up.
- Several smaller browsers do not appear here, but total less than 0.0001%

Top Tablet Browsers



Source: ScientiaMobile



Smartphones: What Are The Most Common Screen Resolutions?

Western Countries

- Apple's iPhone 5, 5S, 5c screens drive the most popular screen size (640 X 1136).
- High res screens (1080 X 1920 and 720 X 1280) account for over 30% of smartphone screens.

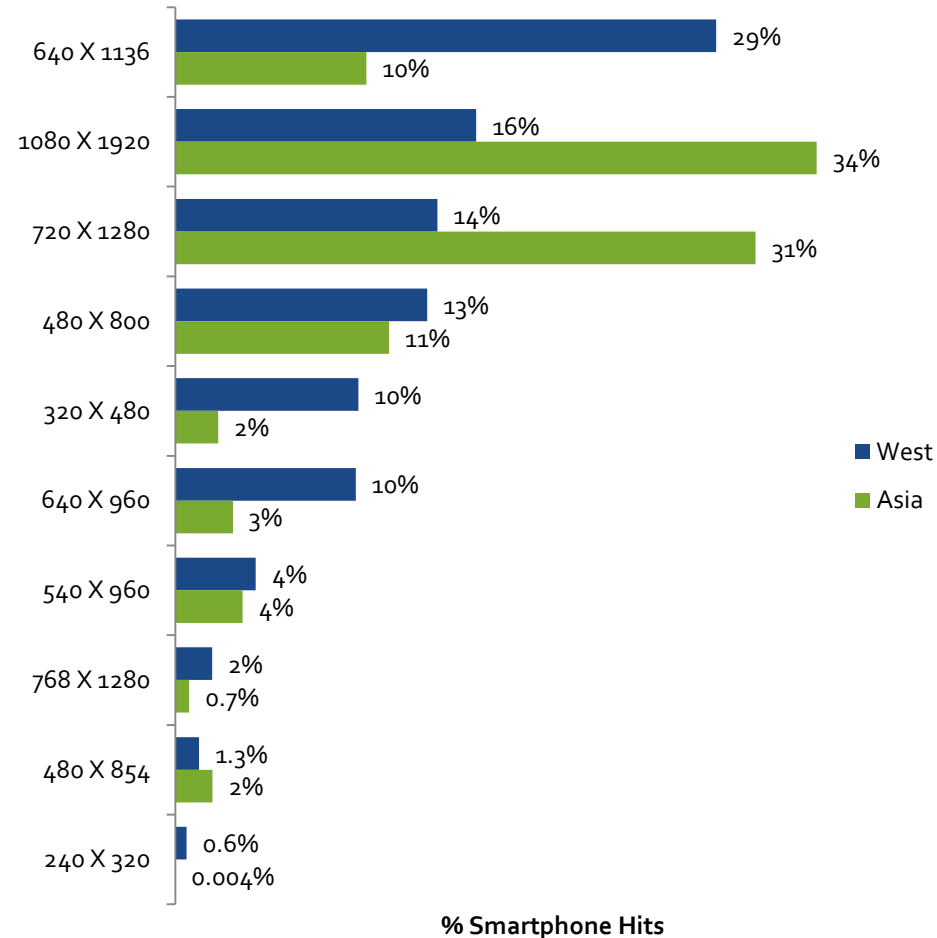
Asia

- With Asia's preference for large screen devices, the top positions go to high resolution screens. 1080 X 1920 at 34% and 720 X 1280 at 31% make up a majority of the market.

Key Comparisons

- Asia has driven a large demand for the large physical dimension, high-resolution phones.

Top Smartphone Screen Resolution



Source: ScientiaMobile



Tablets: What Are The Most Common Screen Resolutions?

Western Countries

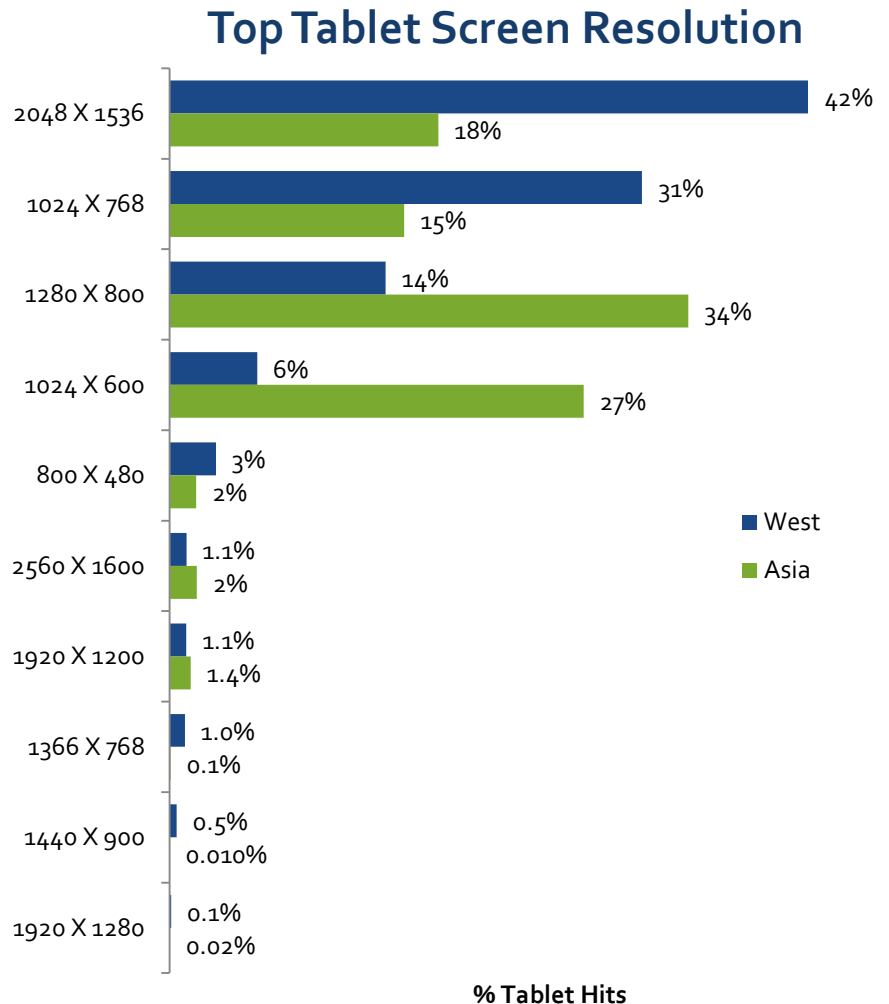
- iPad's Retina displays (2048 X 1536) hold the top position with 42% of tablet traffic.

Asia

- 1280 X 800 is the most popular resolution in Asia – driven by many of the Samsung devices.

Key Comparisons

- The popularity of 7 and 8 inch devices in Asia drives a striking difference in adoption of the 1280 X 600 resolution vs. Western Countries.



Source: ScientiaMobile



How Does Usage Vary During The Day?

Western Countries

- Traffic coming from mobile devices peaks in the evening.
- Smartphones have a more constant usage, exhibiting a peak hour at 9PM with traffic that is 1.6x the daily average.
- Tablets are used less frequently during the morning and daytime.
- Tablets' peak occurs at 21hours (9PM).
- Tablets have a more pronounced peak hour that is 2.1x the daily tablet average traffic.

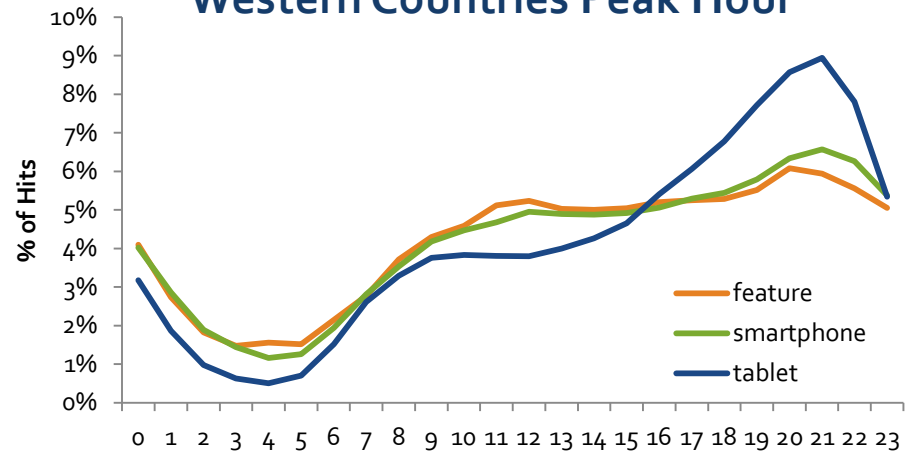
Asia

- Asia's smartphone traffic peaks at 7PM at 1.5x the daily average.
- Tablets peak at 10 PM at 1.6x the daily average.

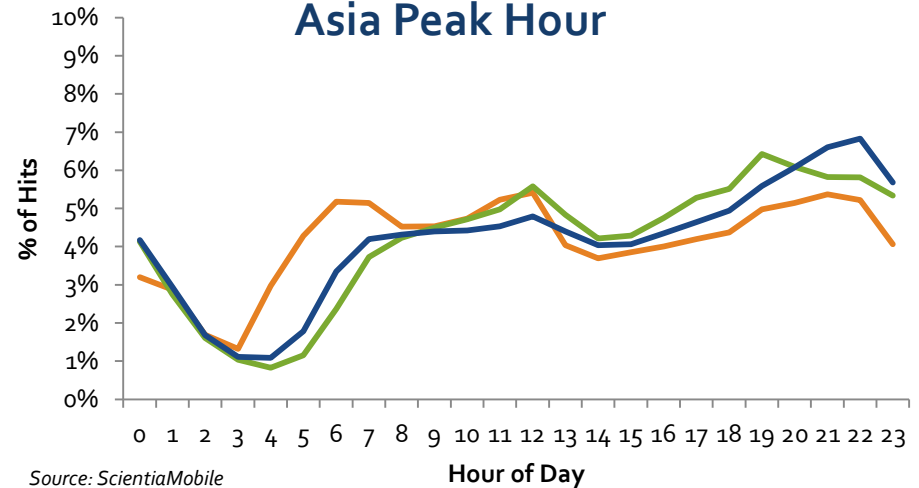
Key Comparisons

- Tablets are more pervasive in Western Countries.
- Tablet's larger late-evening peak hour suggests higher leisure usage.
- The high peak of tablets in Western Countries also indicates that they might be using them more intensely for mobile Web versus Asia at the same peak hour.
- Asian Feature Phone users also appear to start the day earlier, with a significant portion of their usage between 4 and 7 AM.

Western Countries Peak Hour



Asia Peak Hour



Source: ScientiaMobile

scientiamobile

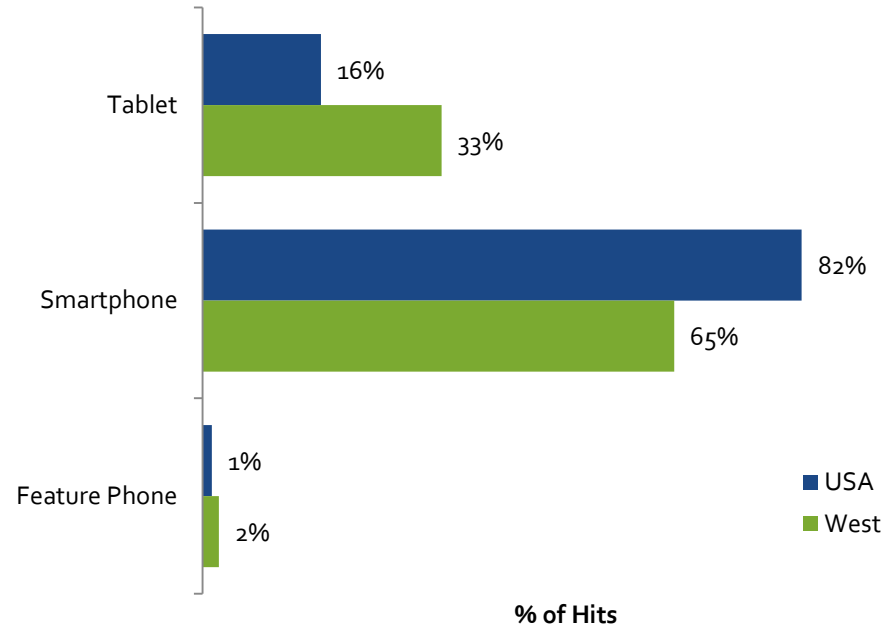
**Spotlight:
United States of America**





Percent of Mobile Hits by Form Factor

- Tablet usage in the USA (16%) is lower than the rest of the Western Countries (33%).
- Likewise, the smartphone usage is higher for the USA at 82%.



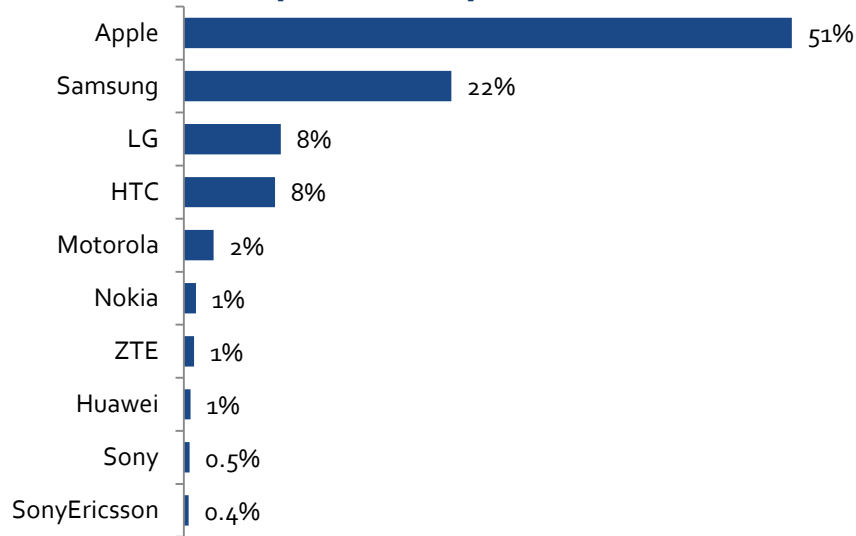
Source: ScientiaMobile



Whose Devices Drive Usage?

- For smartphones in the USA, Apple users continue to generate a majority of the traffic with 51%.
- Apple's top spot in the USA is very different from the global trend, where Apple generates only 19% and Samsung holds the top position.
- Samsung holds the second position in the USA, and after a tie for 3rd place by LG and HTC, competition drops off dramatically.
- Apple holds a clear leadership position for tablets with 72% of traffic.
- Samsung, with 12% of hits, is the second largest.
- Several reader-oriented tablets from Amazon and Barnes and Noble generate significant web traffic in the USA.

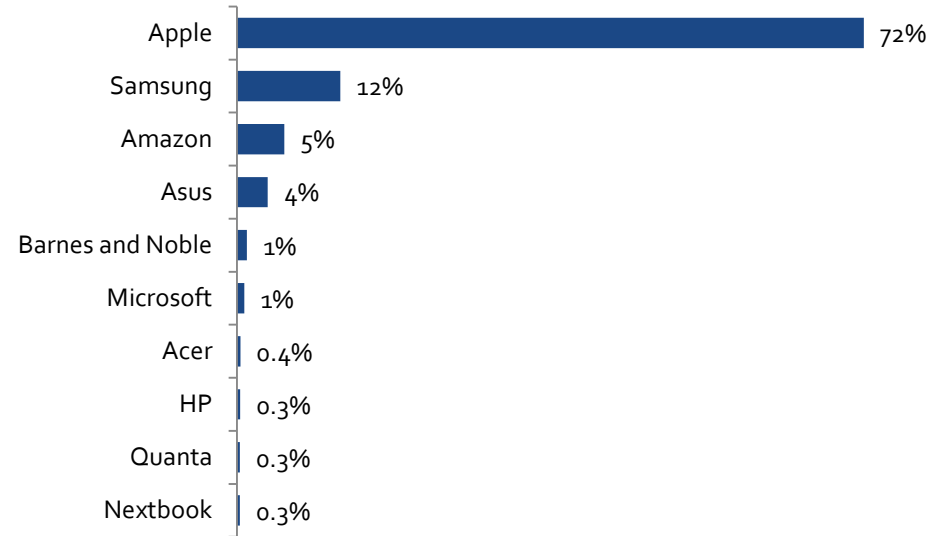
Smartphones by Manufacturer



% Smartphone Hits

Source: ScientiaMobile

Tablets by Manufacturer



% Tablet Hits

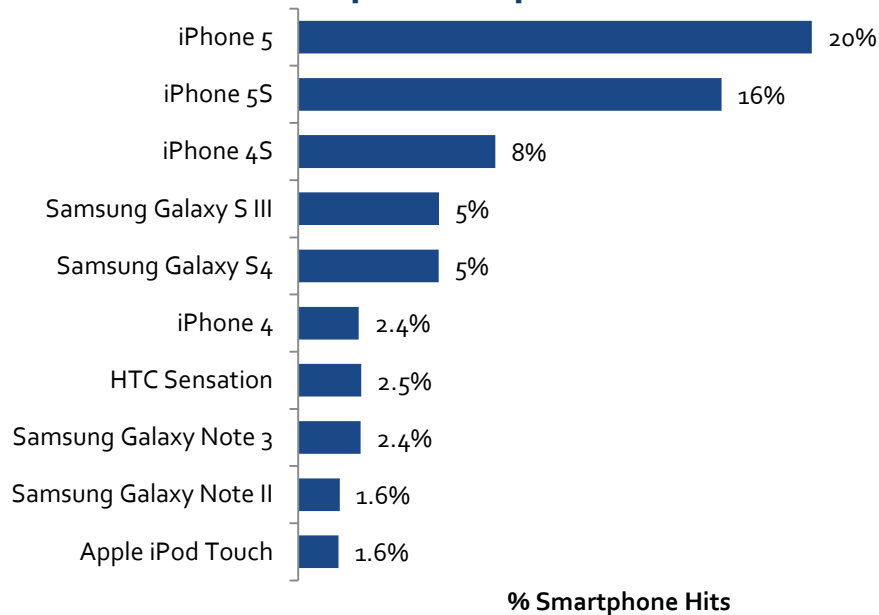
Source: ScientiaMobile



What Are The Top Models By Usage?

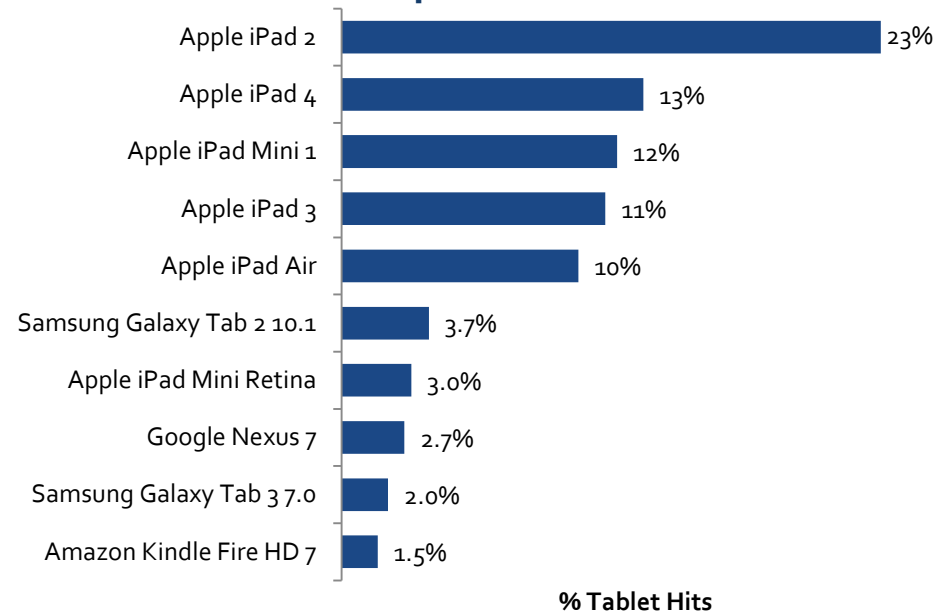
- In the USA, Apple's iPhones dominate the top spots, generating over 48% of smartphone hits.
- Samsung's older Galaxy SIII holds fourth place, but it is nearly surpassed by the newer S4, and the S5 is coming up quickly (currently in 13th place).
- HTC Sensation is the lone non-Apple and non-Samsung model.
- The older iPad 2 still generates the largest portion of USA tablet traffic (23%).
- Samsung has 2 of the top 10 tablets in the USA.
- Amazon's Fire HD readers and the Google Nexus 7 show the popularity of 7 inch readers, even when used for Web browsing.

Top Smartphones



Source: ScientiaMobile

Top Tablets

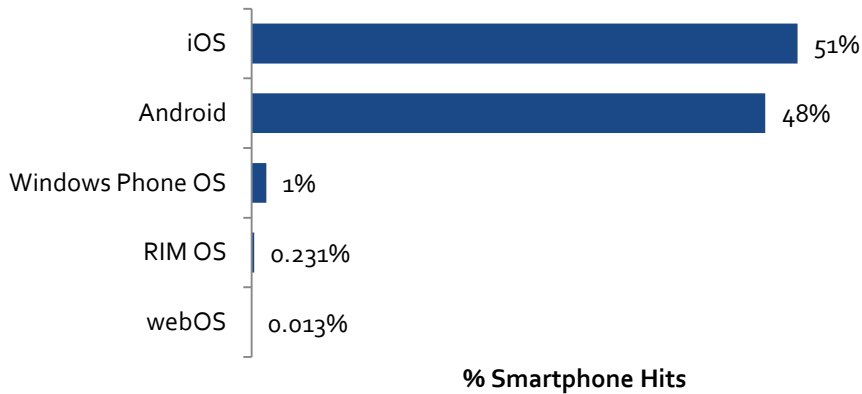


Source: ScientiaMobile

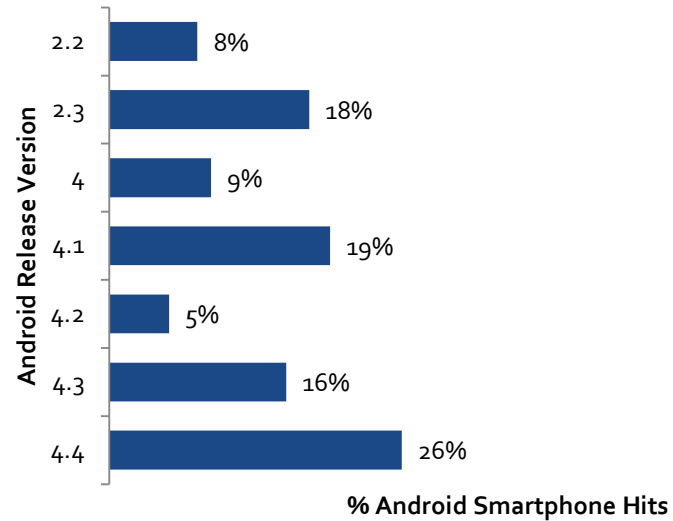
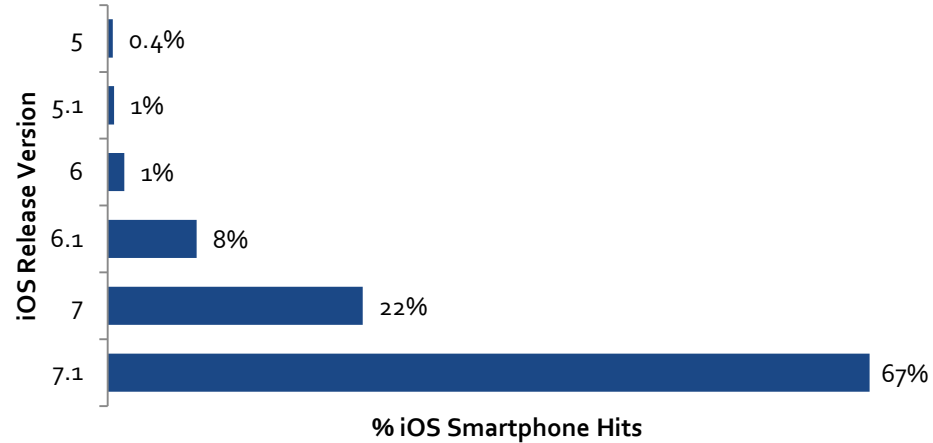


Smartphone: Market Share by Operating System

- In the smartphone traffic from the USA, iOS maintains a slight majority usage at 51%, versus Android at 48%.
- Outside of Windows Phone at 1%, no other OS breaks the 1% level.
- Android has a very fragmented base of releases, with over 26% of traffic coming from versions before release 4.
- Fragmentation is also broad for Android users on versions 4 through 4.4.
- iOS has less fragmentation, with 67% of usage on iOS release 7.1.
- Even though Apple has been very successful in pushing release updates, over 10% of usage still occurs on release 6.1 or before.



Source: ScientiaMobile



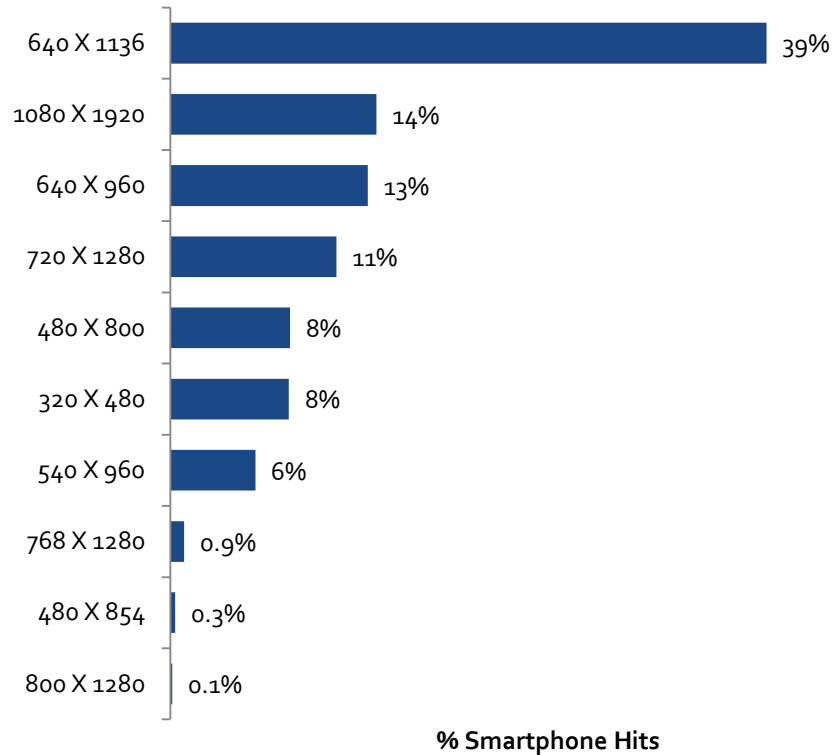
Source: ScientiaMobile



What Are The Most Common Screen Resolutions?

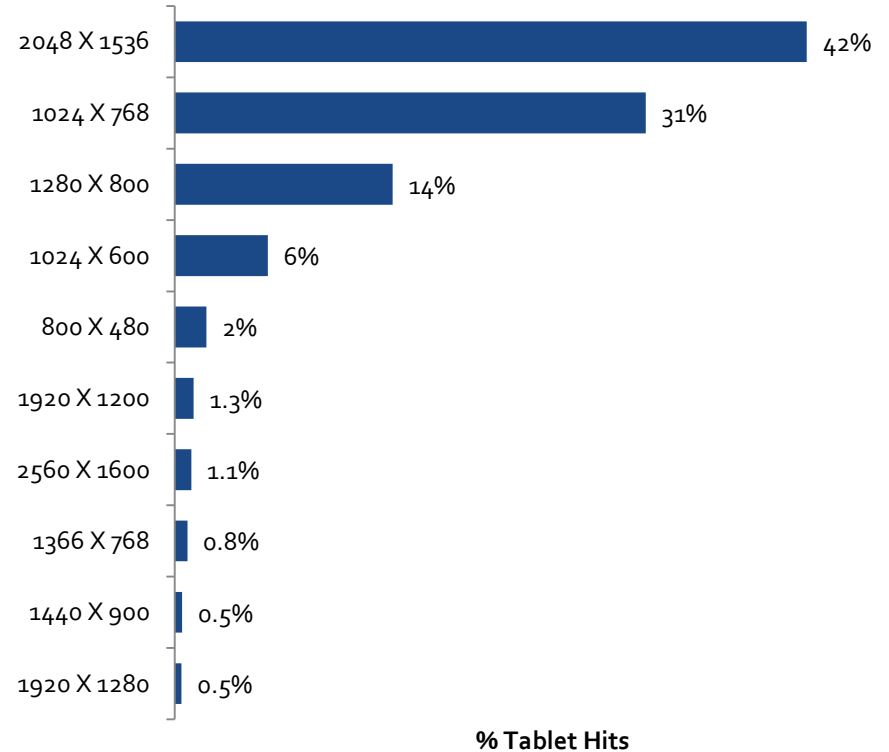
- iPhone 5, 5s, and 5c account for the most popular resolution (640 x 1136).
- iPad's Retina displays (2048 x 1536) in various models hold the top position with 42% of tablet traffic.

Top Smartphone Screen Resolutions



Source: ScientiaMobile

Top Tablet Screen Dimensions

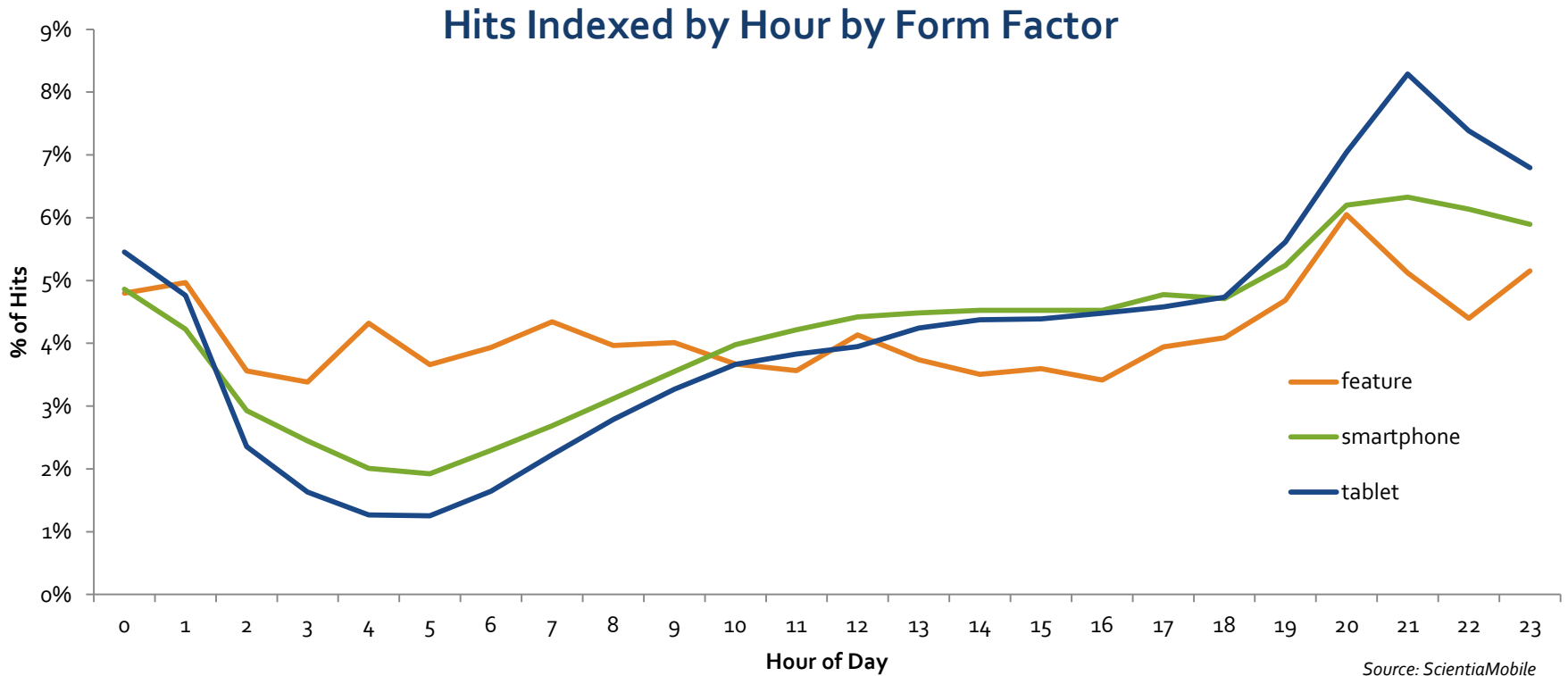


Source: ScientiaMobile



How Does Usage Vary During The Day?

- Traffic coming from mobile devices peaks in the evening.
- Smartphones have a more constant usage, exhibiting a 8PM peak hour traffic that is 1.5x the average.
- Tablets are used less frequently during the morning and daytime.
- Tablets have a more pronounced peak hour at 9PM that is 2.0x the average traffic.
- Feature phones have very consistent usage through the early morning period.



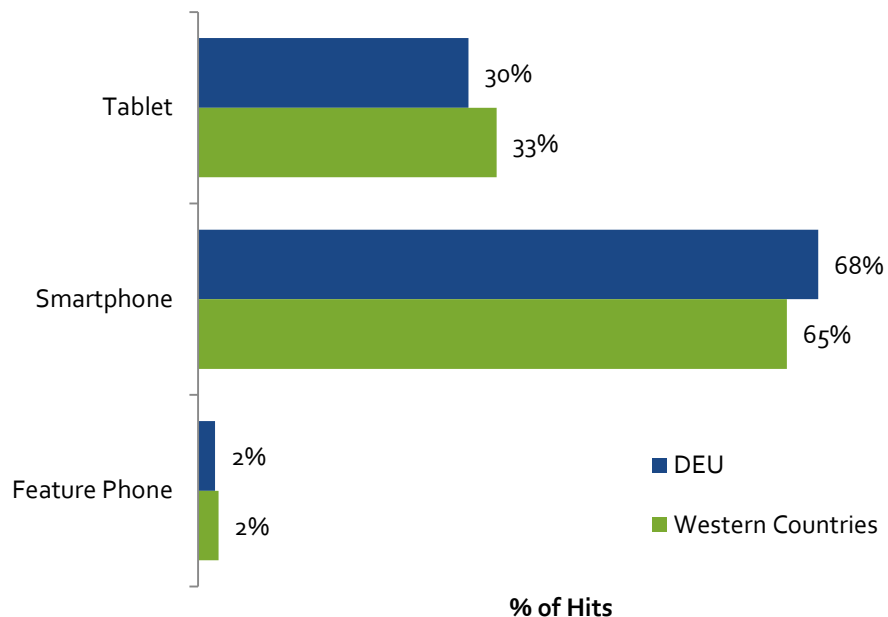
scientiamobile

Spotlight: Germany



Percent of Mobile Hits by Form Factor

- Germany has a percent of its traffic coming from tablets on par with the average of Western Countries (30%).
- Like the rest of the world, smartphones in Germany generate the majority of the traffic at 68%, but this is significantly below the global average of 80% of the traffic coming from mobile devices.
- Very little traffic originates from feature phones in Germany.



Source: ScientiaMobile

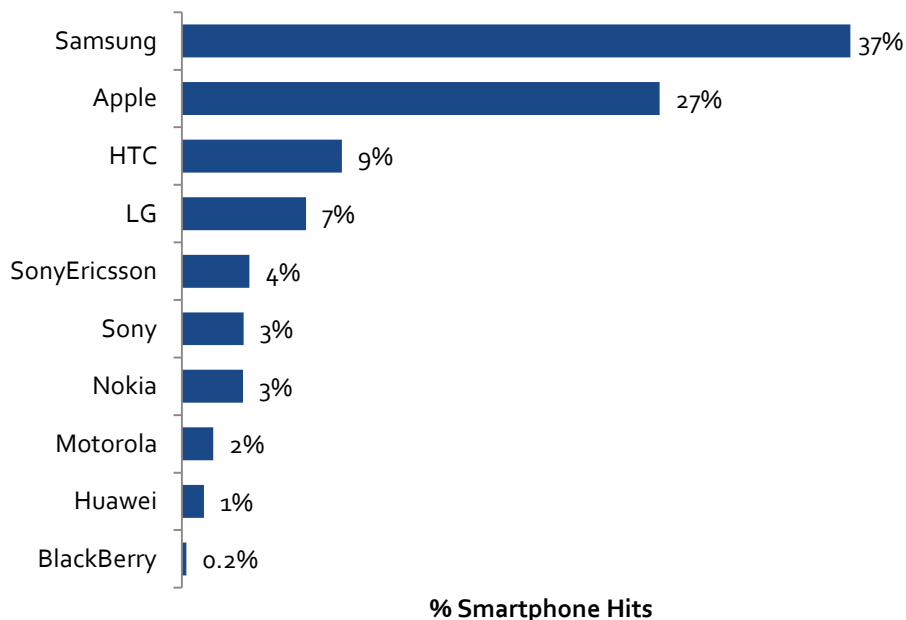


Whose Devices Drive Usage?

- For smartphones in Germany, Samsung devices continue to generate the leading amount of traffic, at 37%.
- Apple holds the second place in Germany at 27%.
- HTC (9%) and LG (7%) and a number of smaller competitors make up the remainder of the top 10.

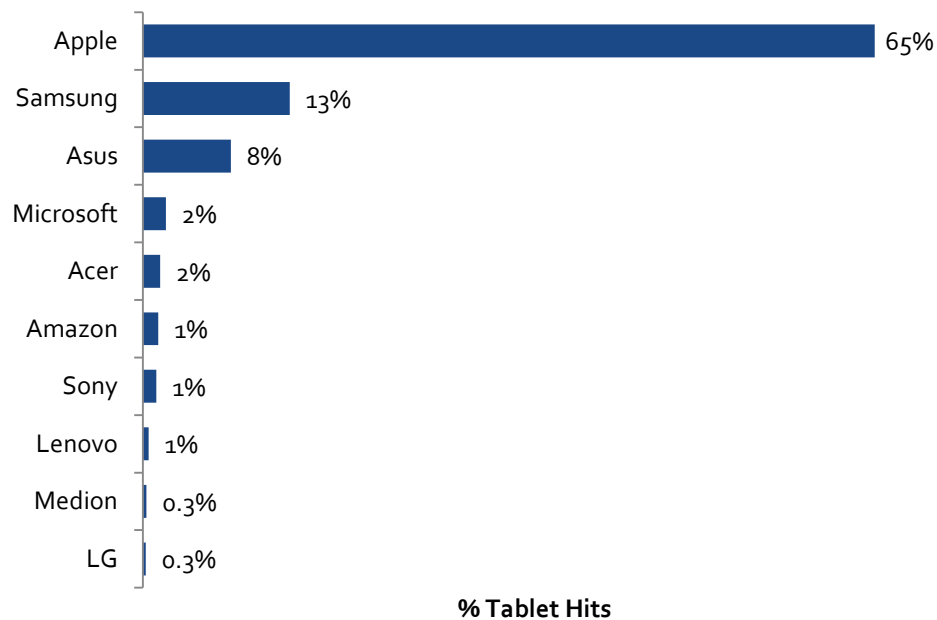
- Apple holds a clear leadership position for tablets with 65% of traffic.
- Samsung, with 13% of hits, is the second largest.
- Asus holds the third place at 8%. Asus is the manufacturer for the Google Nexus 7.

Top Smartphone Manufacturers



Source: ScientiaMobile

Top Tablet Manufacturers



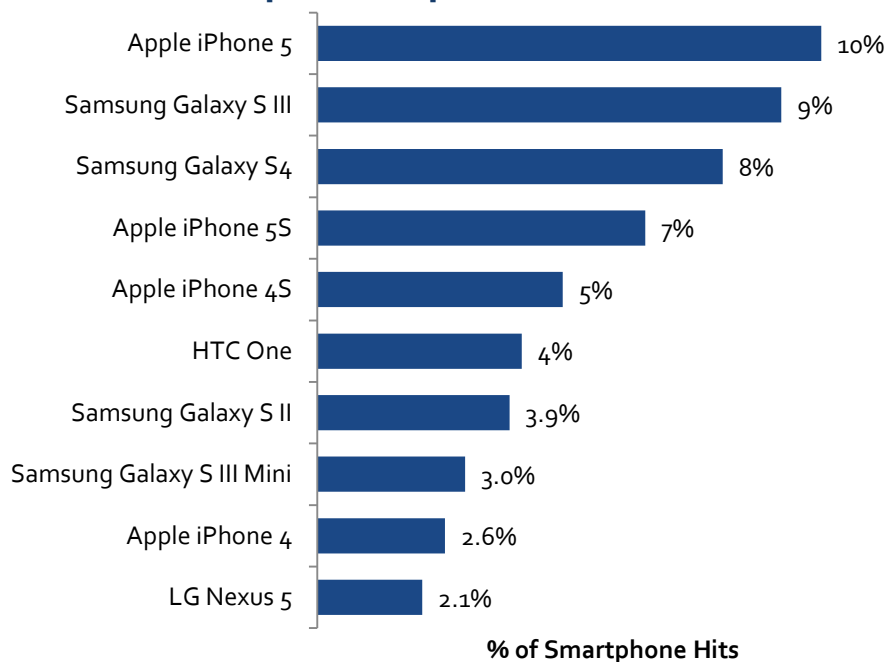
Source: ScientiaMobile



What Are The Top Models By Usage?

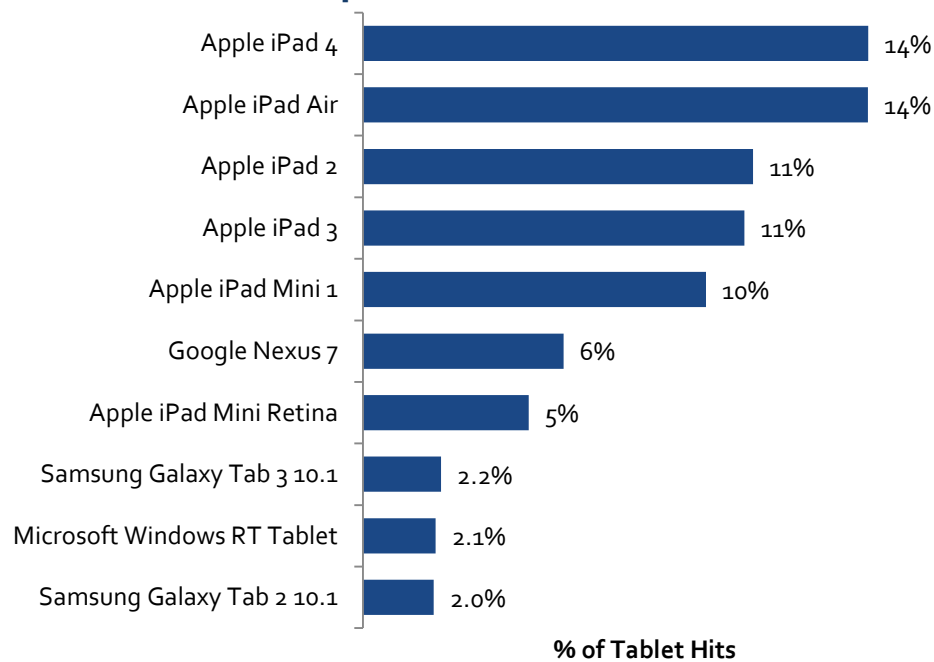
- Apple iPhone 5 holds the top position.
- Samsung's older Galaxy SIII holds second place, but it is nearly surpassed by the newer S4.
- HTC's One (4%) and the LG Nexus 5 (2%) are the only the models not built by Apple or Samsung.
- Apple's newer iPads (4 and Air) hold the top spots in Germany.
- Google Nexus 7 is the next largest non-Apple competitor with 6%.
- Samsung's 10" models also appear in the top 10.

Top Smartphone Models



Source: ScientiaMobile

Top Tablet Models

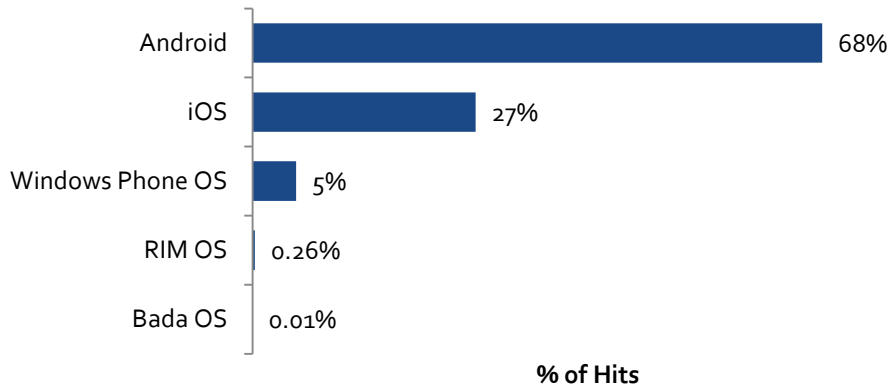


Source: ScientiaMobile

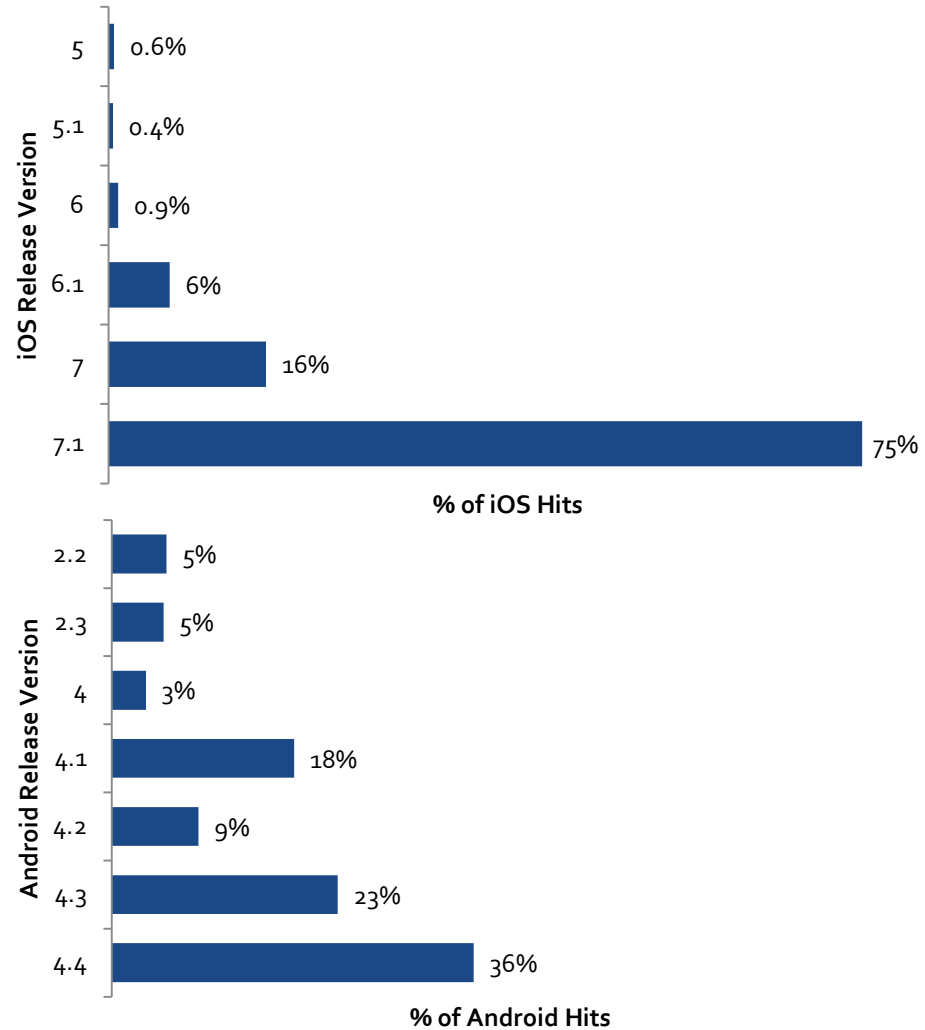


Smartphone Market Share by Operating System

- In Germany, 68% of traffic comes from Android OS.
- iOS (27%) and to a smaller extent Windows Phone (5%) are the only other competitors.
- While Android's release versions are fragmented, in Germany the largest share (36%) goes to its most recent release 4.4.
- iOS has much less fragmentation, with 75% of usage on the iOS release 7.1.



Source: ScientiaMobile



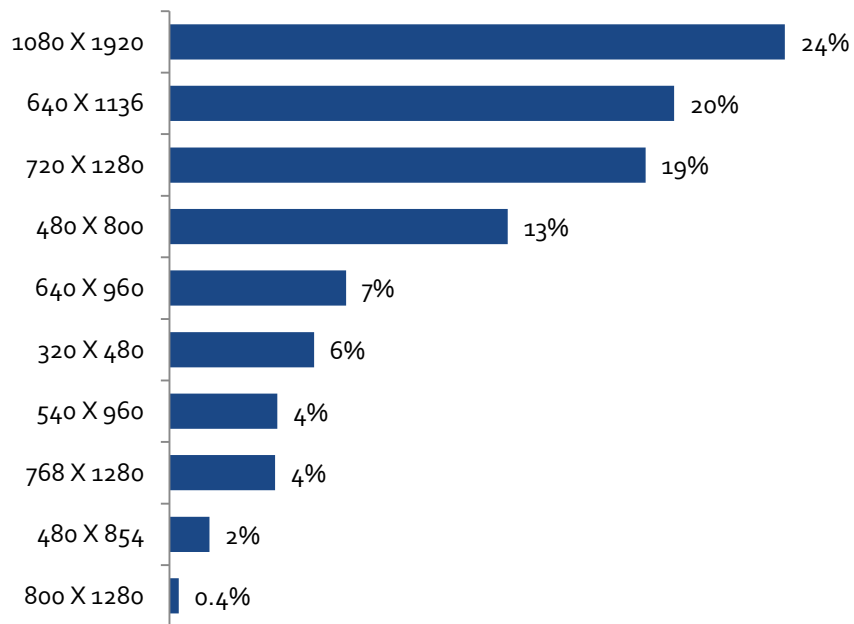
Source: ScientiaMobile



What Are The Most Common Resolutions?

- Many Android smartphones have high-definition screens (1080 x 1920), accounting for 24% of traffic.
- iPhone 5, 5s and 5c account for the second most popular dimensions (640 x 1136) with 20% of traffic.
- iPad's Retina displays (1536 x 2048) in various models hold the top position with 42% of tablet traffic.

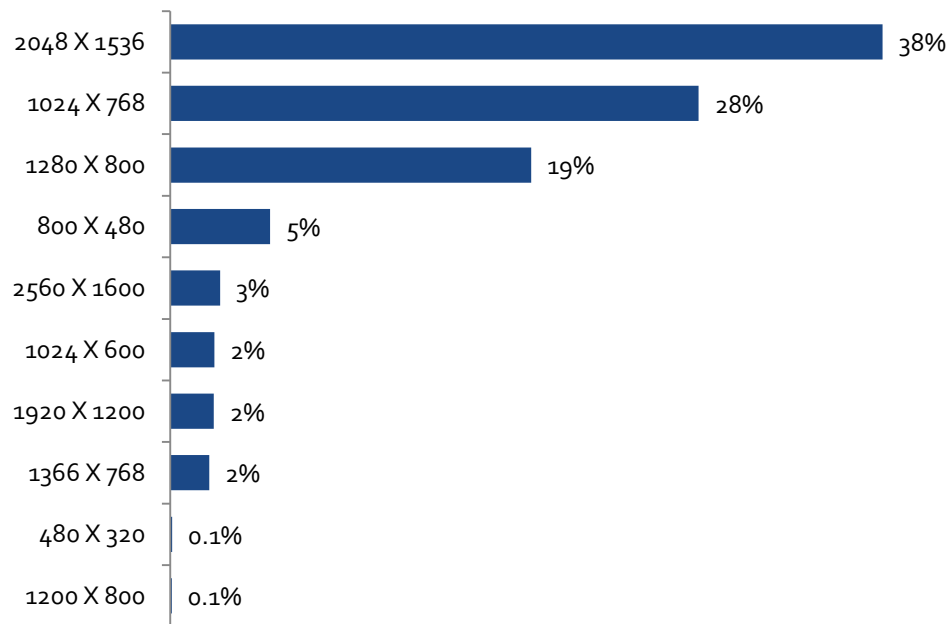
Top Smartphone Screen Resolutions



% Smartphone Hits

Source: ScientiaMobile

Top Tablet Screen Resolutions



% Tablet Hits

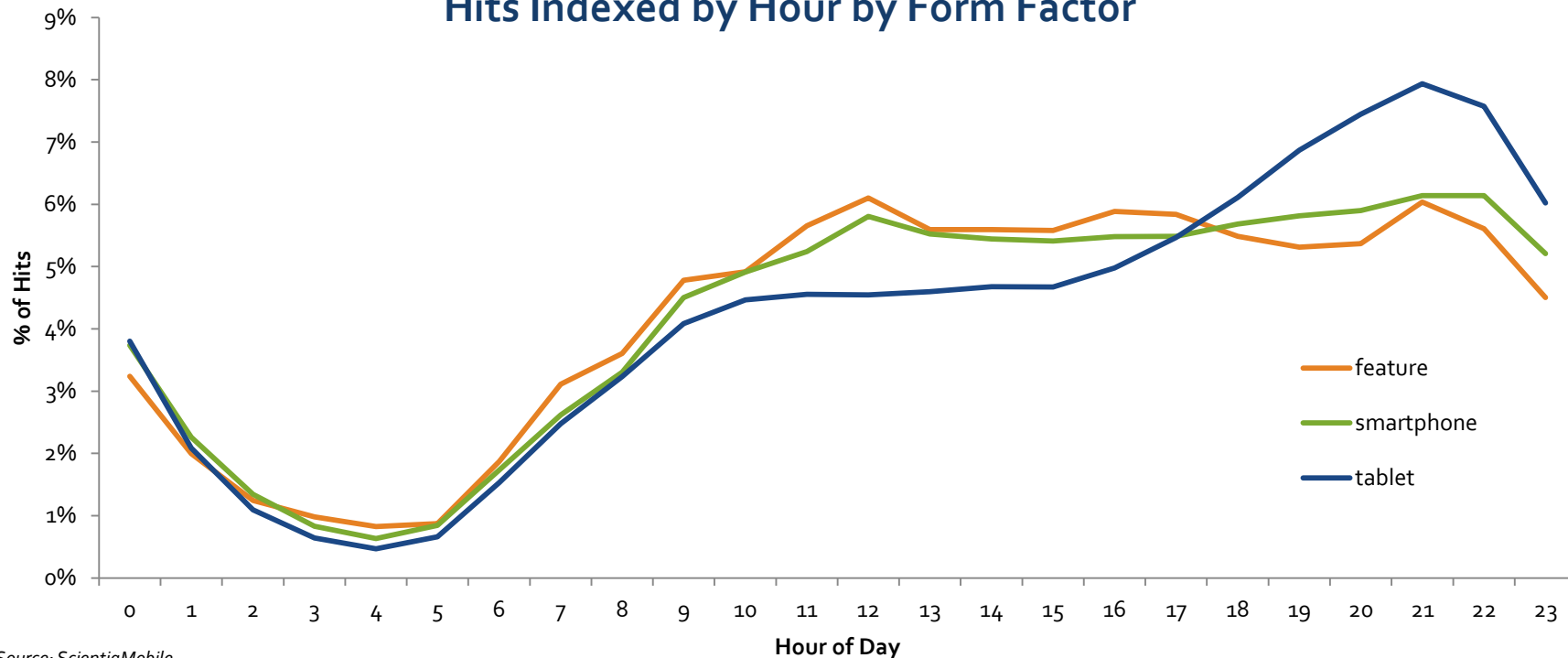
Source: ScientiaMobile



How Does Usage Vary During The Day?

- Traffic coming from mobile devices peaks in the evening.
- All device traffic from Germany exhibits a trough period in the early morning that is more pronounced than global averages.
- Smartphones have a more constant usage, exhibiting a peak hour traffic that is 1.5x the average.
- Tablets are used less frequently during the morning and daytime.
- Tablets have a more pronounced peak hour that is 1.9x the average traffic.

Hits Indexed by Hour by Form Factor



Source: ScientiaMobile

About ScientiaMobile

- ScientiaMobile provides the industry's most accurate and flexible device detection solution, helping customers deliver great web experiences and manage the increasingly fragmented mobile device ecosystem. ScientiaMobile sells WURFL, a constantly-updated repository that catalogues thousands of devices and their capabilities and provides access to them via range of API languages. The WURFL framework enables many organizations, including Fortune 500 companies, to effectively design and analyze web experiences for an ever-growing range of smartphones, tablets, smart TVs and game consoles.
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