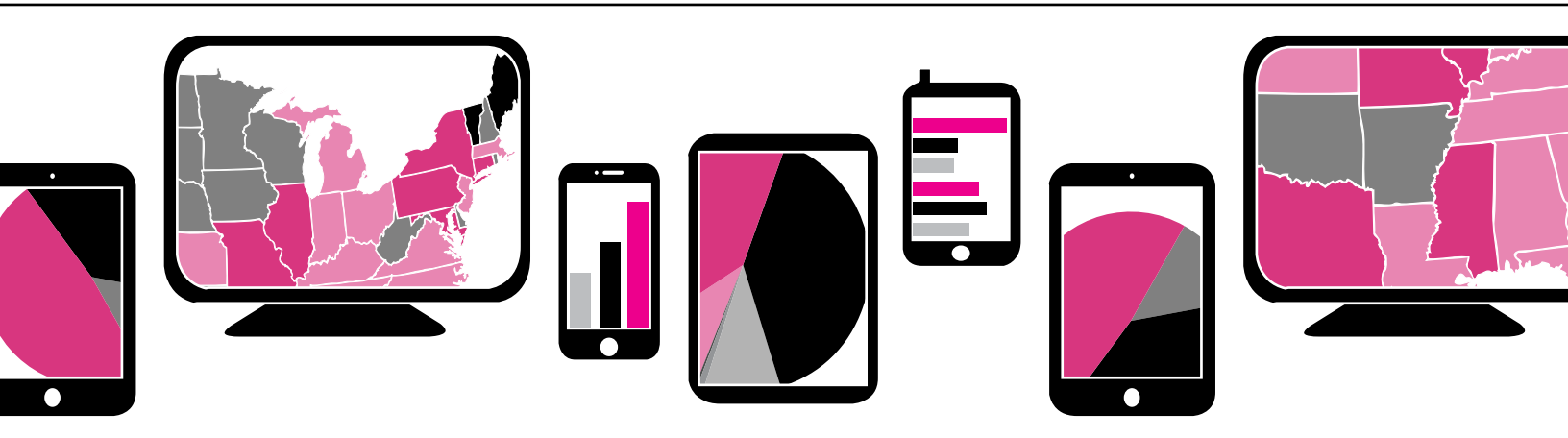


US CONSUMER DEVICE PREFERENCE REPORT

Q2 2013



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Executive Summary

The devices that consumers use to receive and interact with email directly impacts email marketing effectiveness, and should inform the tactics and strategies that marketers adopt as the landscape continues to evolve. Movable Ink's *US Consumer Device Preference Report: Q2 2013* provides deep insight into the current popularity of various devices, reveals clear differences in consumer behavior and engagement based on the devices they use, and provides a never before seen look into how device preferences vary by geographic location.

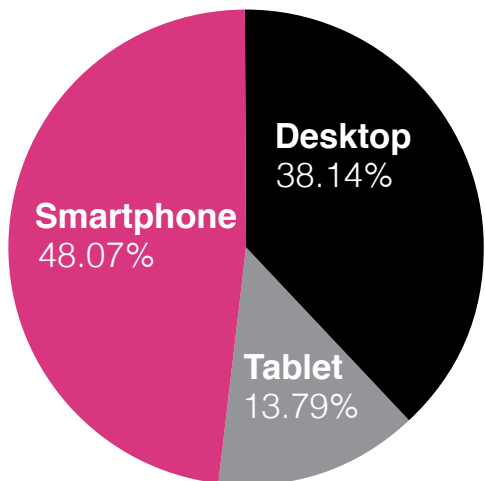
Key Findings:

- **Mobile devices have surpassed desktops.** 62% of emails were opened on smartphone or tablet devices, with just 38% of email opens recorded on desktops.
- **iOS is more widely used for email than Android.** Although the Android operating system captured 80% market share of global smartphone shipments in Q2 2013*, the iPhone continues to reign as the most popular smartphone for checking email. iPhones accounted for 38.5% of total email opens this quarter, compared to just 9.3% for Android smartphones.
- **Android users spend the most time viewing emails.** Android users spend more time viewing emails when they are opened— 53% spend 15 seconds or more viewing each message, compared to just 41% of iPhone users.
- **The East trends towards smartphone use, while desktops dominate in the West.** Texas is the most smartphone friendly state, with over 55% of emails opened on a smartphone. On the whole, the majority of the East and South prefers using smartphones for email, whereas large states in the Central and Western parts of the country still trend towards desktops.

*Source: IDC Worldwide Mobile Phone Tracker, August 7, 2013

EMAIL OPENS

By Device



62%

of emails were opened on a **smartphone or tablet**

51%

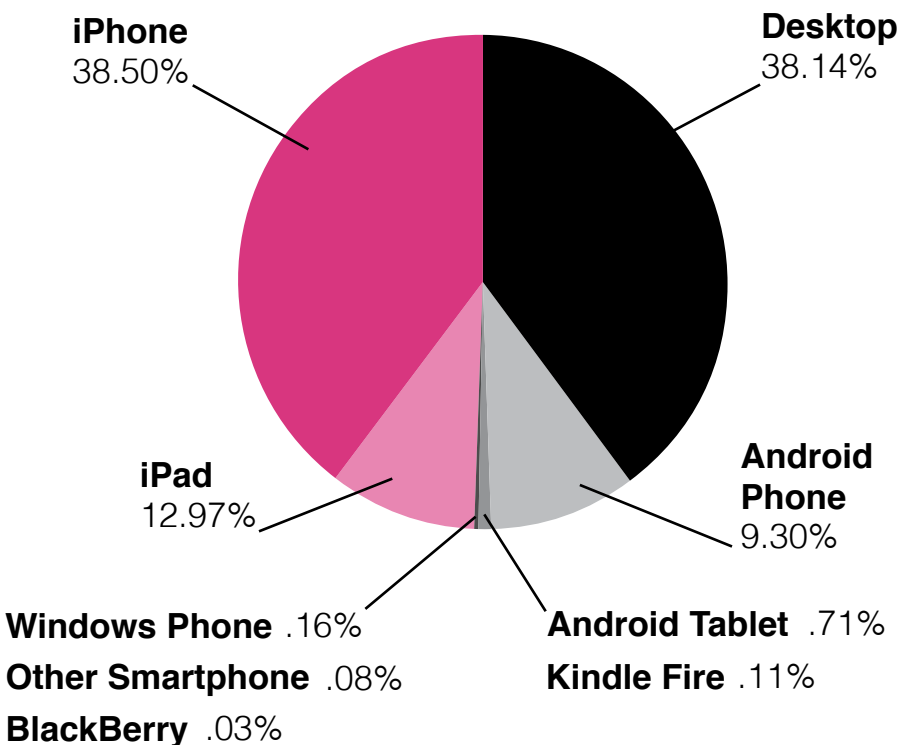


Apple smartphone or tablet

10%

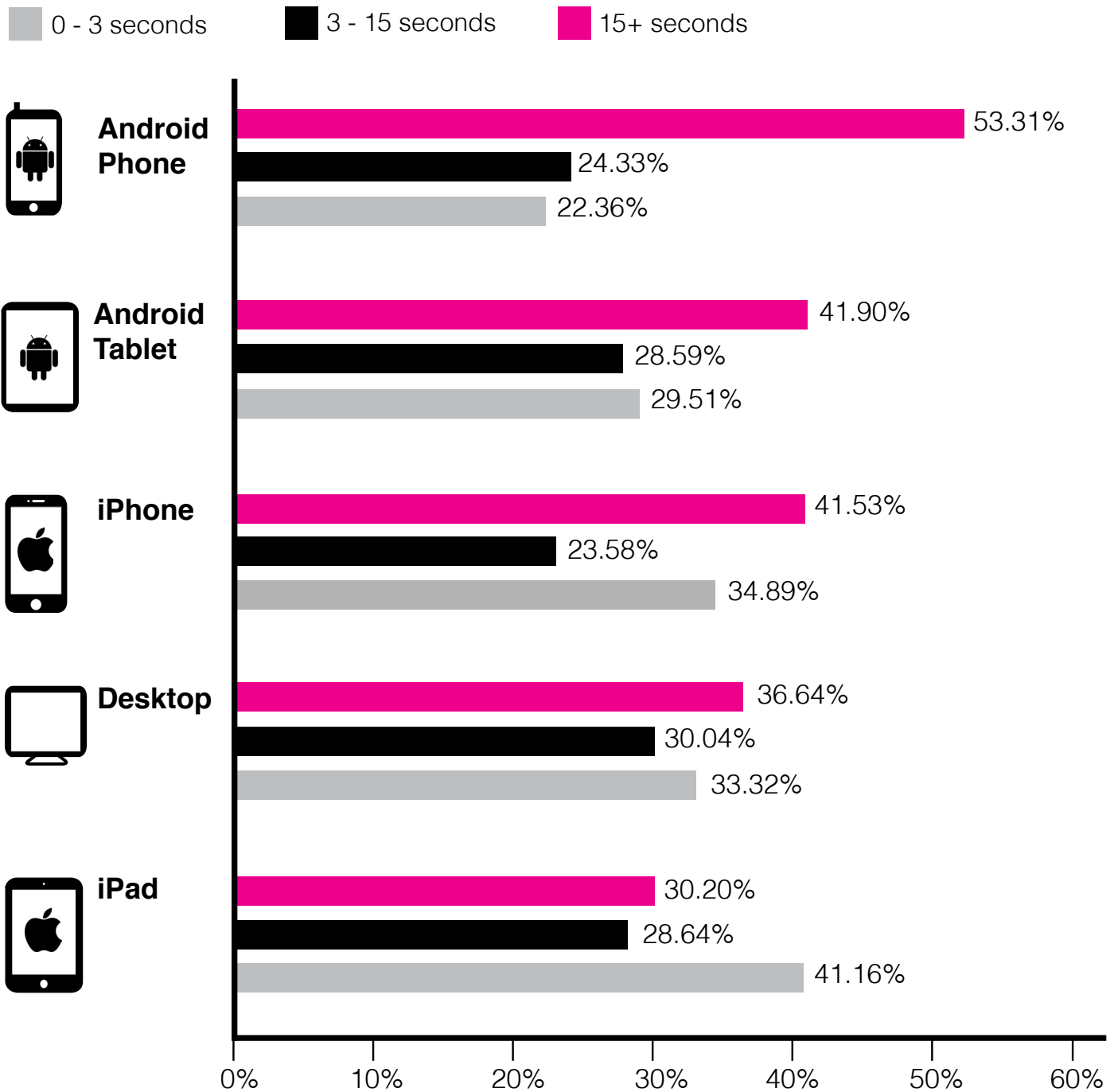


Android smartphone or tablet



READ LENGTH

By Device



EMAIL OPENS

By US State

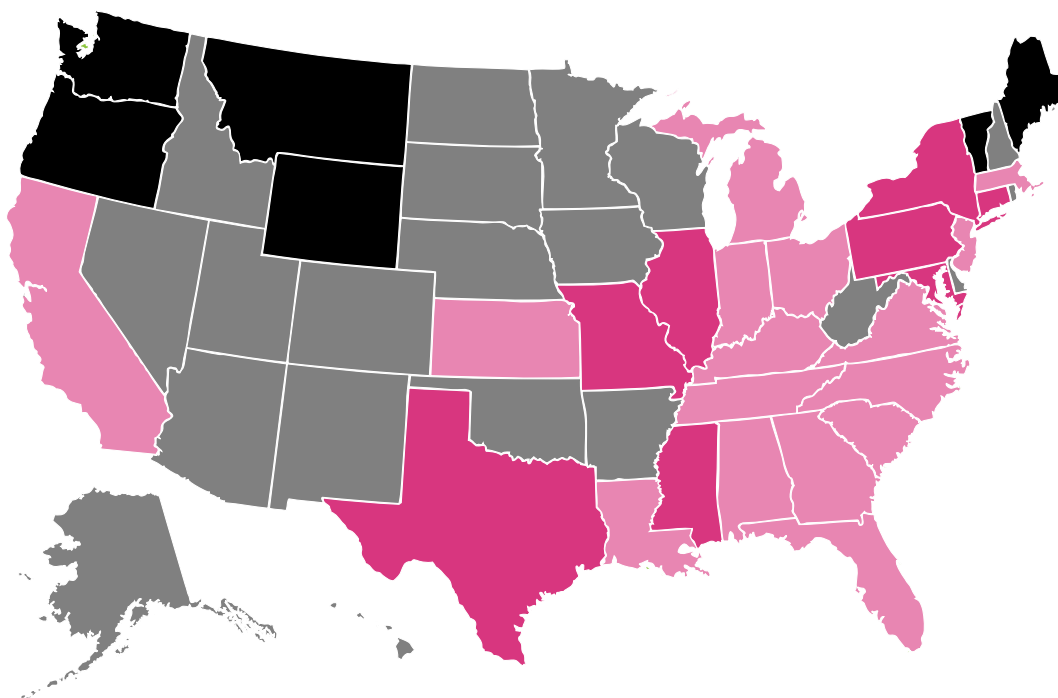
Desktop

vs.

Smartphone

■ Heavy ■ Leaning

■ Heavy ■ Leaning



Top 10 Desktop States

No.	State	% Desktop
1	Maine	53.94%
2	Montana	52.98%
3	Vermont	52.94%
4	Washington	52.14%
5	Oregon	51.32%
6	Wyoming	50.09%
7	Idaho	49.74%
8	Wisconsin	48.79%
9	New Hampshire	48.67%
10	North Dakota	47.36%

Top 10 Smartphone States

No.	State	% Smartphone
1	Texas	55.08%
2	Maryland	53.80%
3	Illinois	53.27%
4	New York	52.15%
5	Mississippi	51.73%
6	Pennsylvania	50.96%
7	Connecticut	50.85%
8	Missouri	50.12%
9	Florida	49.67%
10	Georgia	49.54%

“Heavy” means that more than 50% of recipients in the state open email on a smartphone or desktop. “Leaning” means that fewer than 50% of recipients in the state open email on a smartphone or desktop, but that those devices are currently the most widely used in the state (e.g., if desktop had the highest percentage of opens when compared to smartphones and tablets, but not the combination of the two, the state is labeled as “Leaning desktop.”)

Methodology

Charts are based on data collected through Movable Ink's Agile Email Marketing platform between April 1 – June 30, 2013. They reflect aggregate statistics across Movable Ink's customer base, which includes more than 100 enterprise B2C marketers from the retail, travel, financial, media, and telecommunications industries. Because determining email opens requires images to load, the percentages for some device-types and platforms might be over or underrepresented.



Movable Ink is the leading provider of Agile Email Marketing technology. Since the channel's inception, email has been frozen in time at the moment when a marketer hits the "Send" button. With Agile Email Marketing from Movable Ink, email can now be dynamically updated in real-time based on each individual recipient's time, location, device, social context, and even the weather. Innovative brands, such as American Eagle Outfitters, Seamless, Finish Line, and Lilly Pulitzer use Movable Ink to enhance customer engagement and increase marketing ROI.

The company is based in New York City and is backed by Intel Capital, Contour Venture Partners, Metamorphic Ventures, ff Ventures, Kima Ventures and email veterans such as Bob Pittman, Andy Russell, Josh Baer, and Alan Laifer.

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