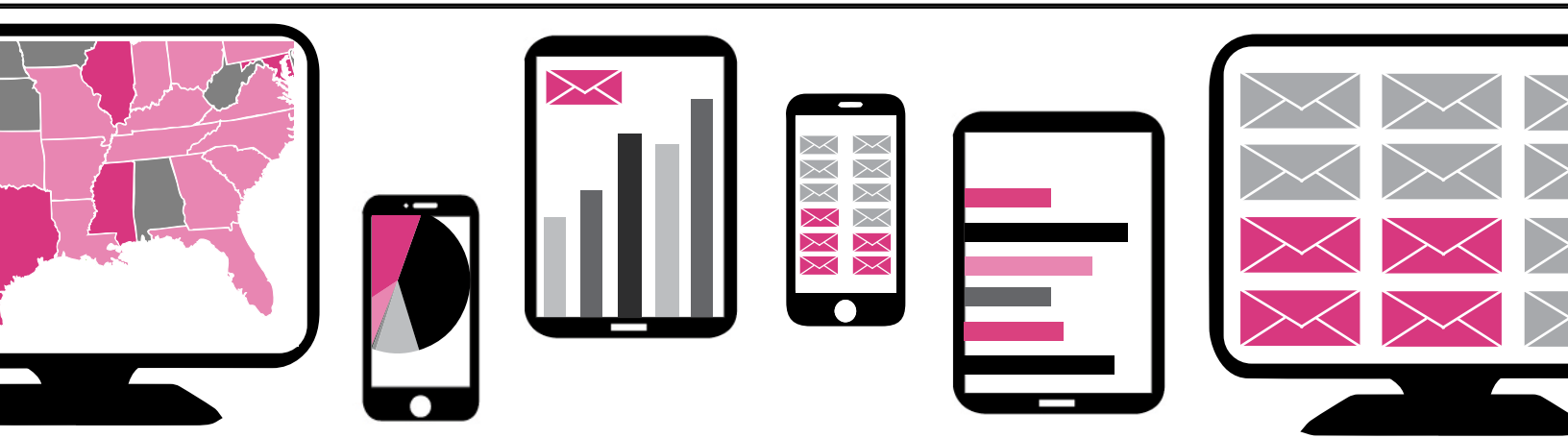


US CONSUMER DEVICE PREFERENCE REPORT

Q3 2013



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Q3 2013

Executive Summary

Growing adoption of smartphones and tablets has widespread ramifications for marketers and the way they communicate with their increasingly mobile consumers.

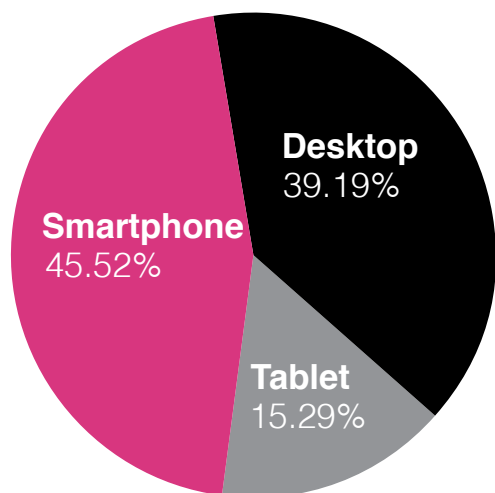
Movable Ink's *US Consumer Device Preference Report: Q3 2013* provides unique insight into the current popularity of various devices, reveals differences in email engagement across smartphones, desktops, tablets, and examines geographic trends and patterns.

Key Findings:

- **Mobile devices continue to dominate desktops.** This quarter, 61% of emails were opened on either a smartphone or tablet device. Desktop accounted for just 39% of total email opens.
- **Tablets take an upturn.** Over 15% of emails were opened on a tablet, up from a little under 14% in Q2 2013. iPad use grew 10% over the last quarter, and now accounts for 14.3% of total email opens. Although Android tablets now comprise only .9% of total email opens, this number has grown nearly 27% from the prior quarter (up from .7% of total email opens in Q2 2013).
- **iOS holds steady over Android.** The iPhone continues to reign as the most popular smartphone used for checking email, accounting for 78.7% of all smartphone email opens. Android phones accounted for 20.7% of smartphone opens and 9.4% of total email opens this quarter.
- **Android users spend the most time viewing emails.** Consistent with Q2 findings, Android users spend more time viewing emails when they are opened—50.5% spend 15 seconds or more viewing each message, compared to 39.5% of iPhone users.
- **Desktops lead in the West, while the East trends towards smartphone use.** Texas is the most smartphone friendly state, with over 53% of emails opened on a smartphone. On the whole, the majority of the East and South prefer using smartphones for email. In the Central and Western parts of the country, most states continue to trend towards desktops, with the exception of California.

EMAIL OPENS

By Device



61%

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

50%

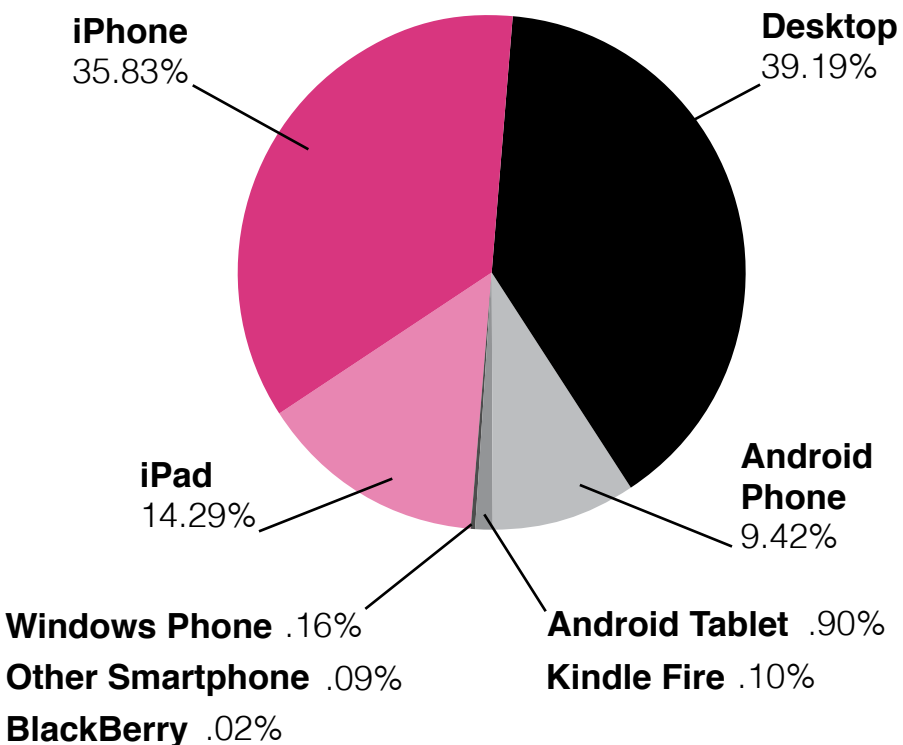


Apple smartphone or tablet

10%

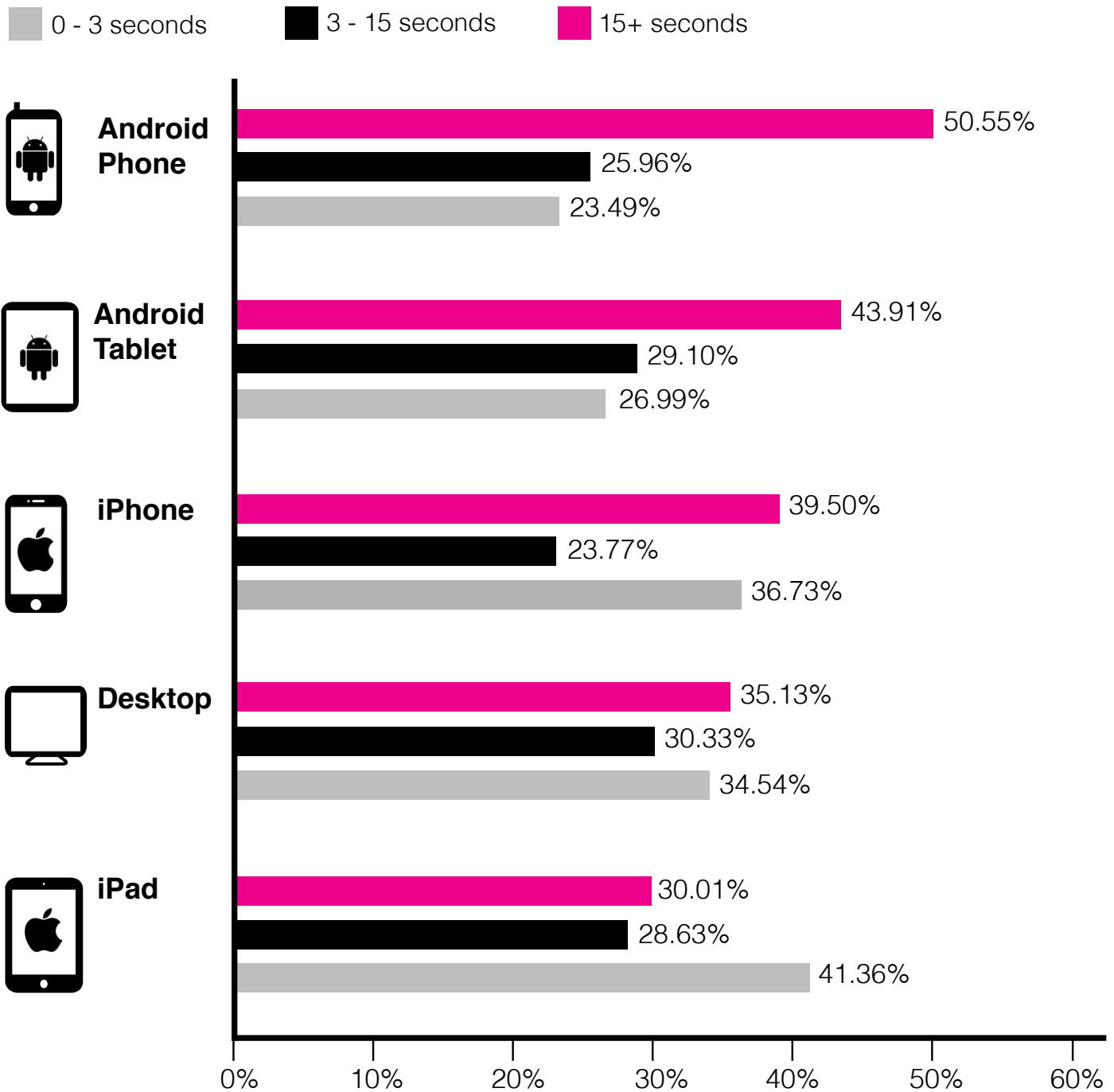


Android smartphone or tablet



READ LENGTH

By Device

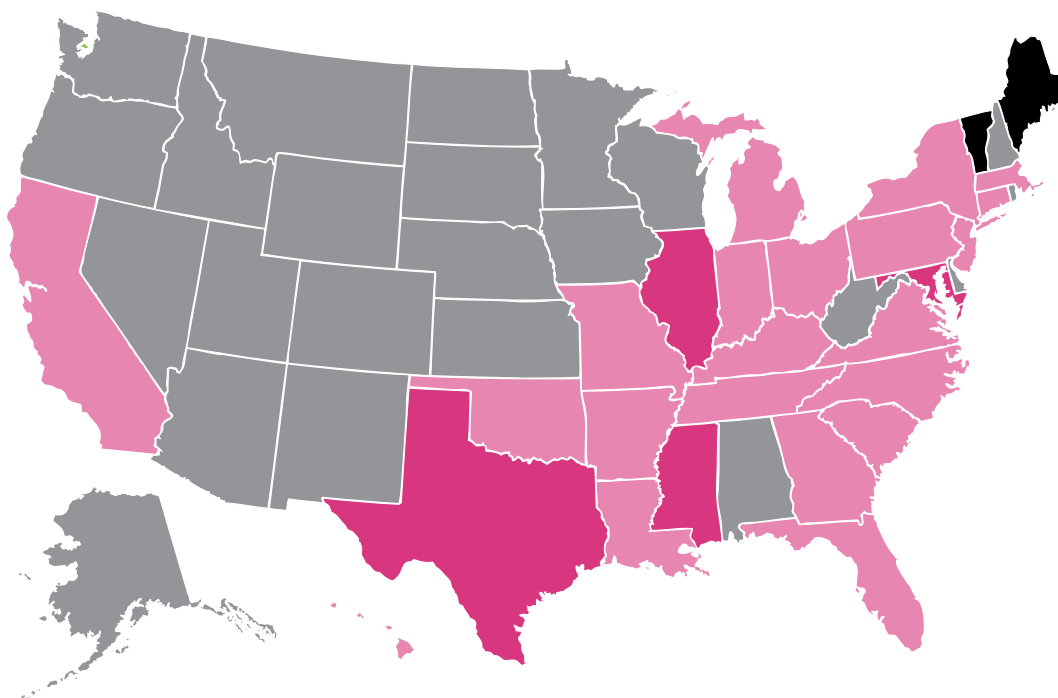


EMAIL OPENS

By US State

Desktop vs. **Smartphone**

■ Heavy ■ Leaning ■ Heavy ■ Leaning



Top 10 Desktop States

No.	State	% Desktop
1	Maine	51.46%
2	Vermont	50.32%
3	Oregon	49.53%
4	Montana	49.36%
5	Idaho	48.49%
6	Washington	48.21%
7	Wyoming	47.95%
8	New Mexico	47.63%
9	Wisconsin	47.44%
10	New Hampshire	47.12%

Top 10 Smartphone States

No.	State	% Smartphone
1	Texas	53.11%
2	Mississippi	51.78%
3	Illinois	51.19%
4	Maryland	53.20%
5	Kentucky	49.69%
6	New York	49.57%
7	Arkansas	49.49%
8	Pennsylvania	49.46%
9	Missouri	49.04%
10	Indiana	48.08%

“Heavy” means that more than 50% of recipients in the state opened email on a smartphone or desktop. “Leaning” means that fewer than 50% of recipients in the state opened email on a smartphone or desktop, but that those devices were 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 July 1 – September 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 devices 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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