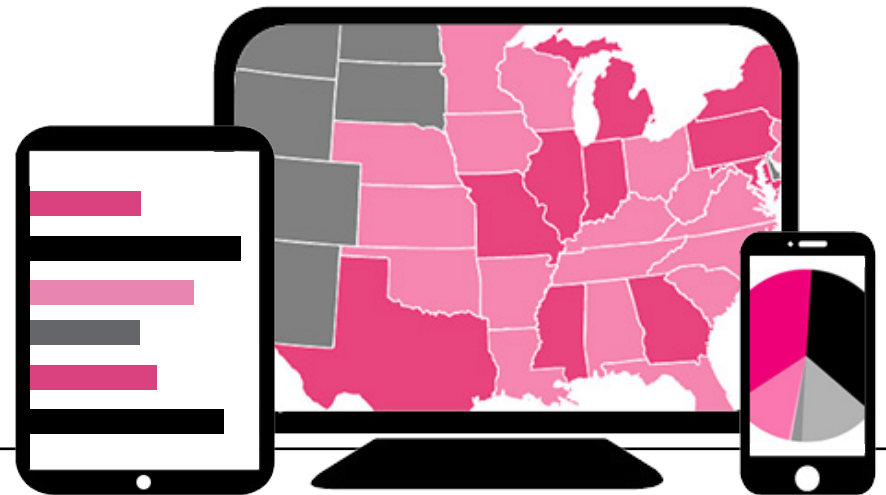




US Consumer Device Preference Report

Q4 2013: *The Mobile Takeover*



EXECUTIVE SUMMARY

Q4 2013: The Mobile Takeover

Movable Ink's US Consumer Device Preference Report provides deep insight into the current popularity of various devices, examines differences in consumer engagement based on the devices they use, and shows how preferences vary across the nation. This quarter's report also includes an exclusive look at device usage over the course of the critical 2013 holiday shopping season.

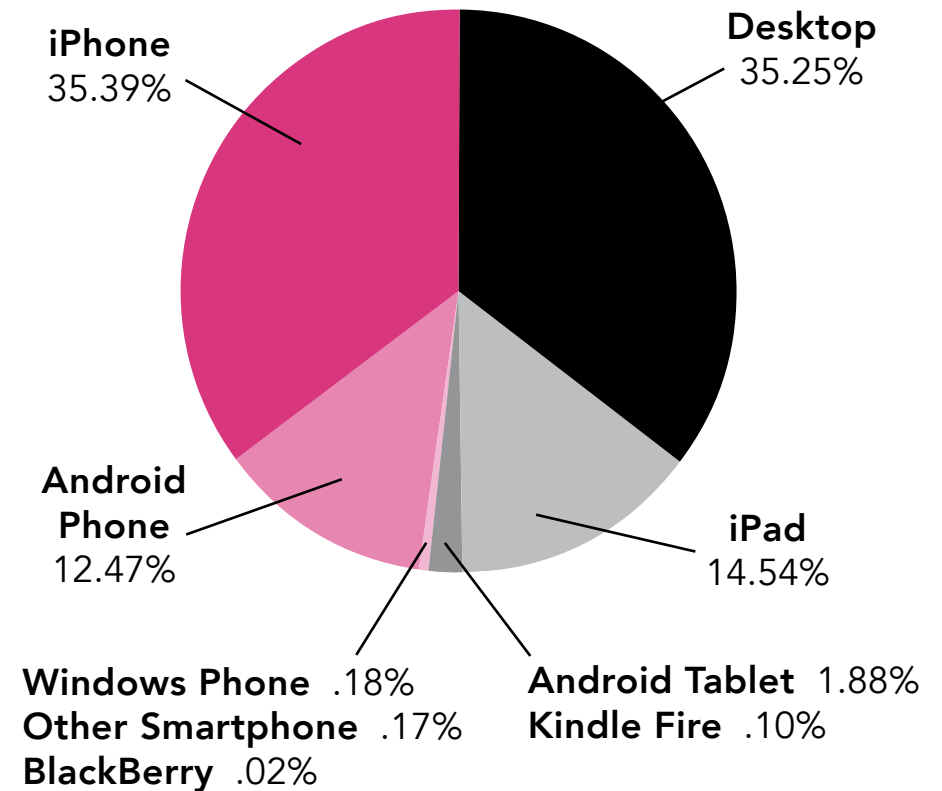
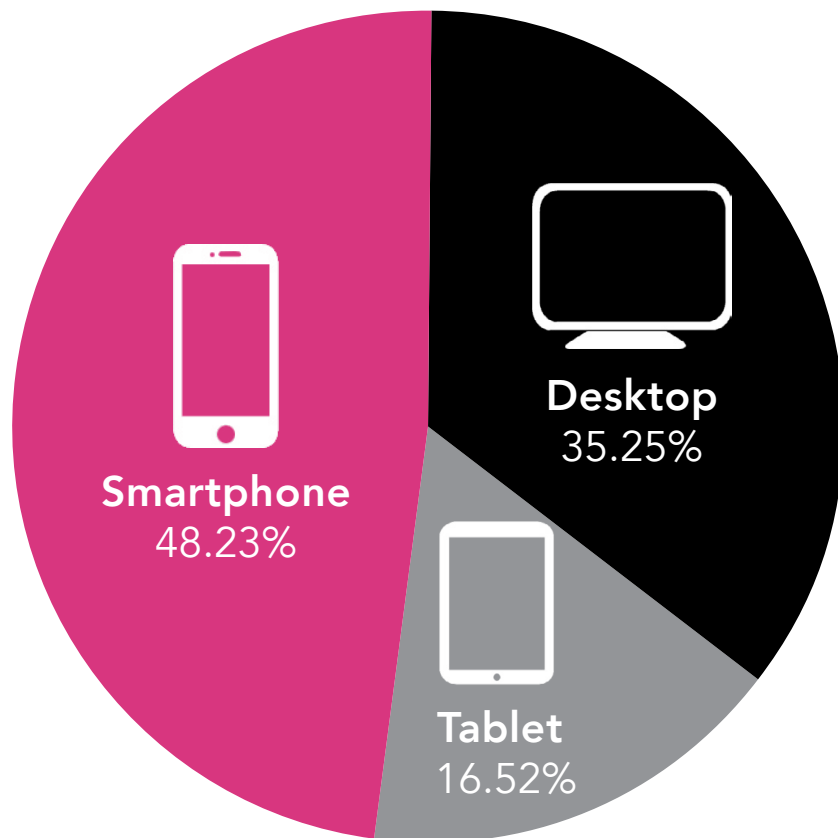
The Q4 2013 findings reveal that consumers are rapidly moving from desktops to mobile devices when it comes to opening and interacting with brand marketing emails. The mobile takeover can no longer be considered mere speculation. Smartphones and tablets aren't just dominating over desktops, but have shown consistent quarter-over-quarter growth.

Key Findings:

- **Nearly two-thirds of all email opens took place on mobile devices.** 65% of emails were opened on either a smartphone or tablet device, up from 61% in Q3 2013. Desktop accounted for just 35% of email opens, a decline from 39% in the previous quarter.
- **Tablet popularity continued to grow.** Over 16% of emails were opened on a tablet, up from 15% in Q3 2013, and slightly under 14% in Q2 2013. Although Android tablets comprise only 1.8% of total email opens, this figure was twice as high as the previous quarter when they accounted for .9% of total email opens.
- **Android gained market share.** Consistent with Q3, Apple smartphones and tablets accounted for 50% of total email opens. But Android smartphones and tablets represented 14% of all email opens, up from 10% in the previous quarter.
- **iPhone users spent the most time viewing emails.** 38% of iPhone users spent 15 seconds or more viewing each message. Android smartphone users came in at a close second, with 35% spending 15 seconds or more viewing an email.
- **This is the first time that no US states were "heavy" desktop users.** Texas remained the most smartphone friendly state, now with over 57% of emails opened on a smartphone (up from 53% last quarter). Although Maine and Vermont maintained their positions as the top two states for desktop use, the percentage of total emails opened on desktops in these states declined to under 50%, as smartphone popularity continued to spread across the nation.
- **Thanksgiving was the biggest day for smartphone use over the holiday season, whereas Cyber Monday was the biggest day for desktops.** On Thanksgiving, nearly 60% of marketing email opens occurred on smartphones. While still beat by smartphone opens (45.5%), Cyber Monday showed the strongest showing for desktops, with 40% of all marketing email opens.

EMAIL OPENS BY DEVICE

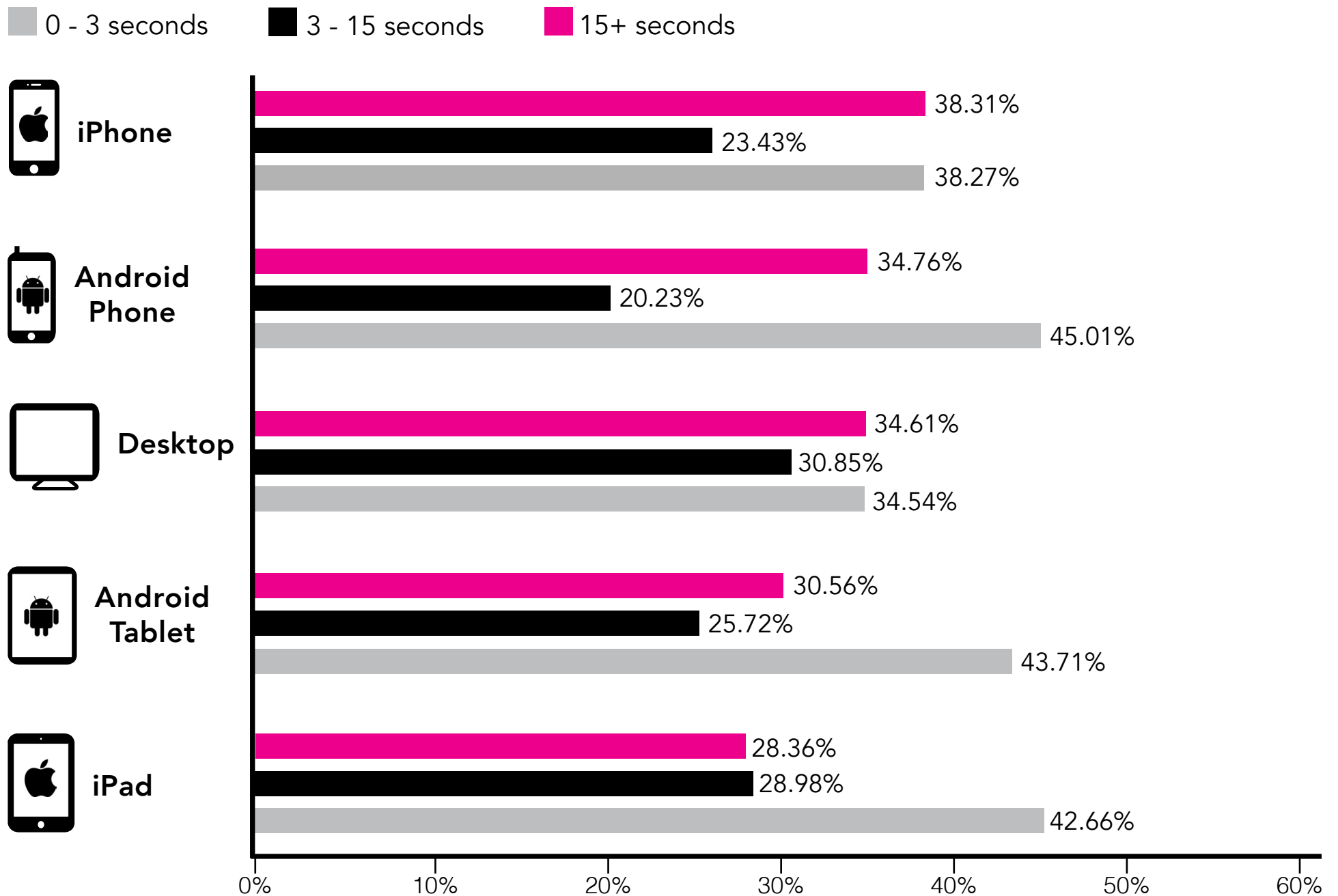
65% of emails were opened on a smartphone or tablet



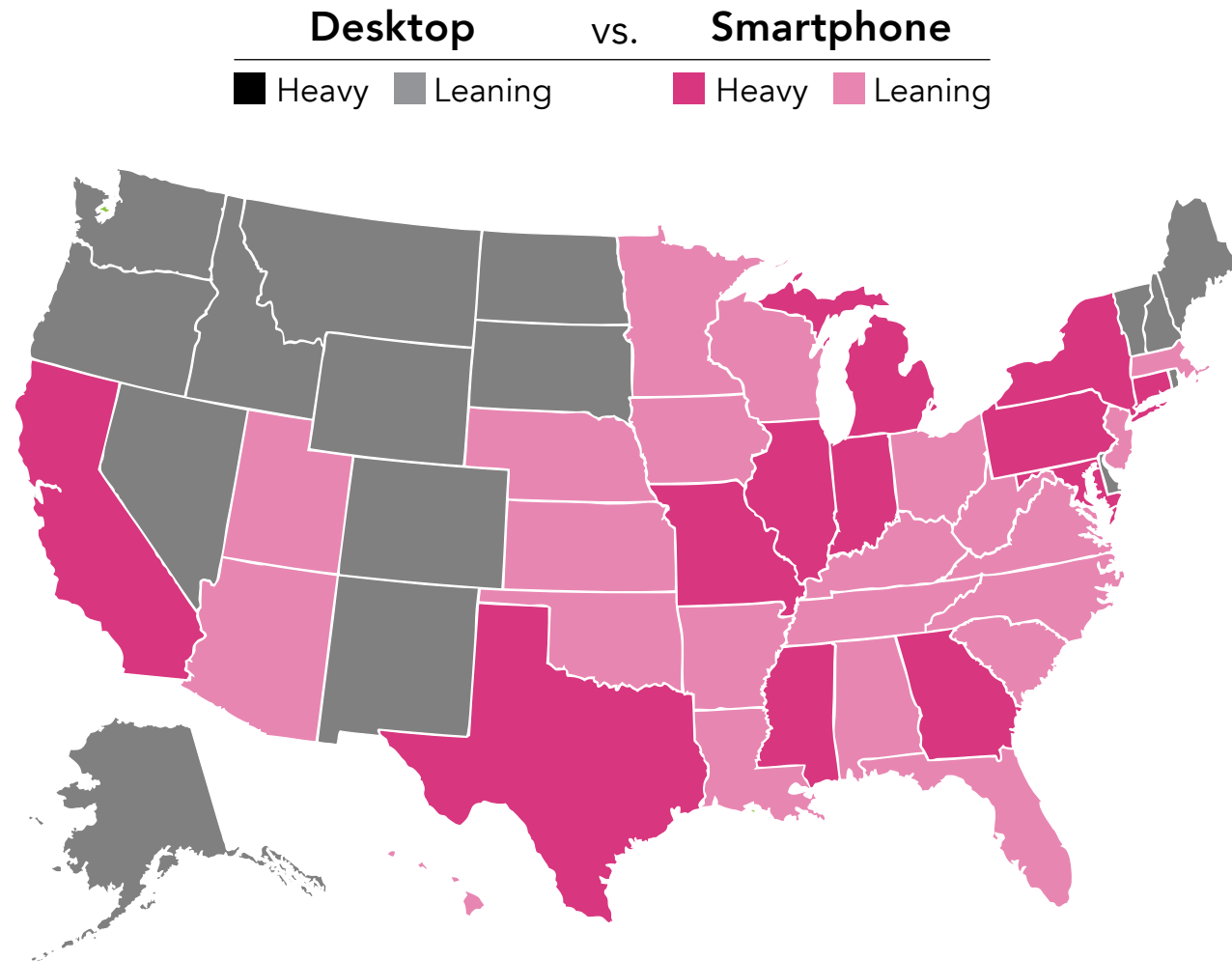
50%  Apple mobile devices

14%  Android mobile devices

EMAIL READ LENGTH BY DEVICE



EMAIL OPENS BY US STATE



“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.”)

Top 10 Smartphone States

No.	State	% Smartphone
1	Texas	57.60%
2	Mississippi	57.27%
3	Indiana	56.22%
4	Maryland	53.35%
5	New York	52.95%
6	Missouri	52.14%
7	Georgia	51.83%
8	Pennsylvania	51.34%
9	Illinois	51.29%
10	Connecticut	50.89%

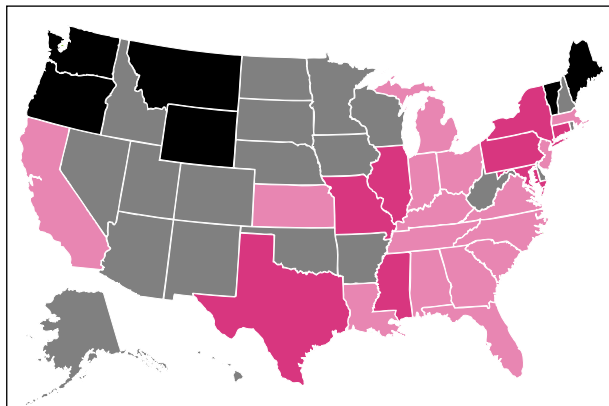
Top 10 Desktop States

No.	State	% Desktop
1	Maine	48.85%
2	Vermont	47.23%
3	Washington	47.19%
4	New Hampshire	45.37%
5	Montana	45.16%
6	Delaware	43.30%
7	Wyoming	43.13%
8	Nevada	42.94%
9	Rhode Island	42.82%
10	Idaho	42.66%

EMAIL OPENS BY US STATE

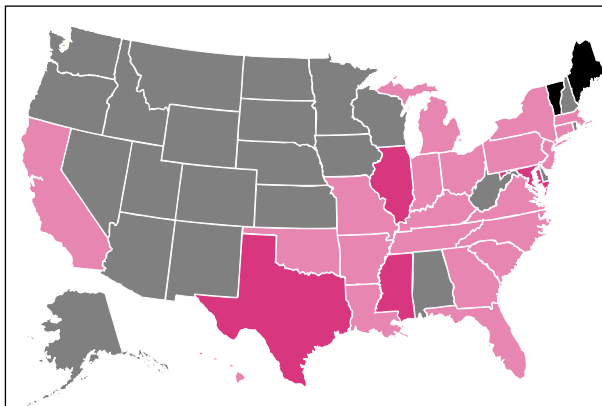
Desktop vs. Smartphone

■ Heavy ■ Leaning ■ Heavy ■ Leaning



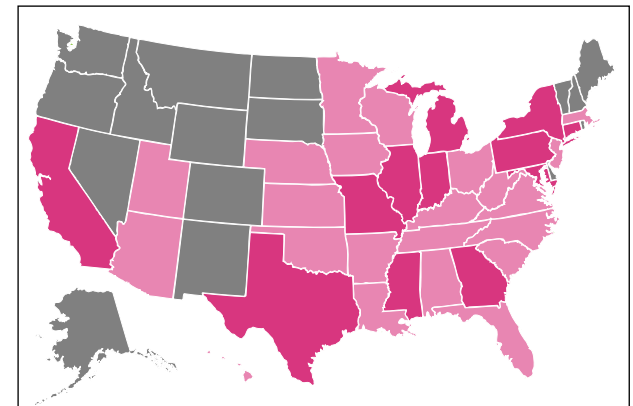
Q2 2013

Device preference	% of US states
Heavy desktop	12%
Leaning desktop	40%
Heavy smartphone	16%
Leaning smartphone	32%



Q3 2013

Device preference	% of US states
Heavy desktop	4%
Leaning desktop	46%
Heavy smartphone	8%
Leaning smartphone	42%



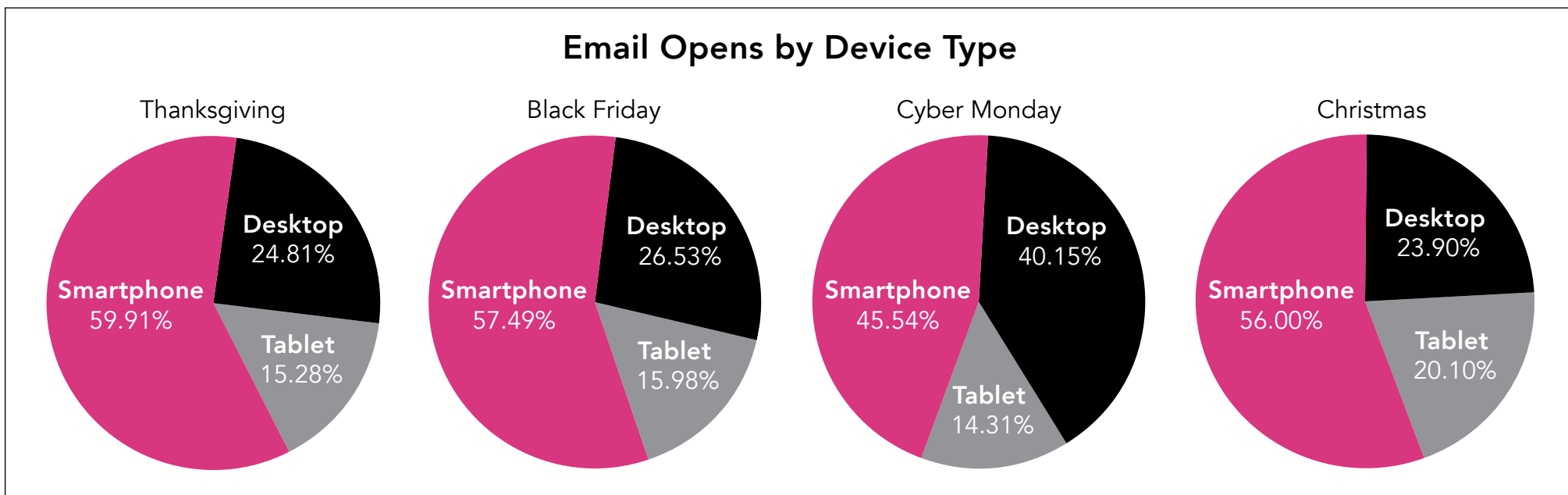
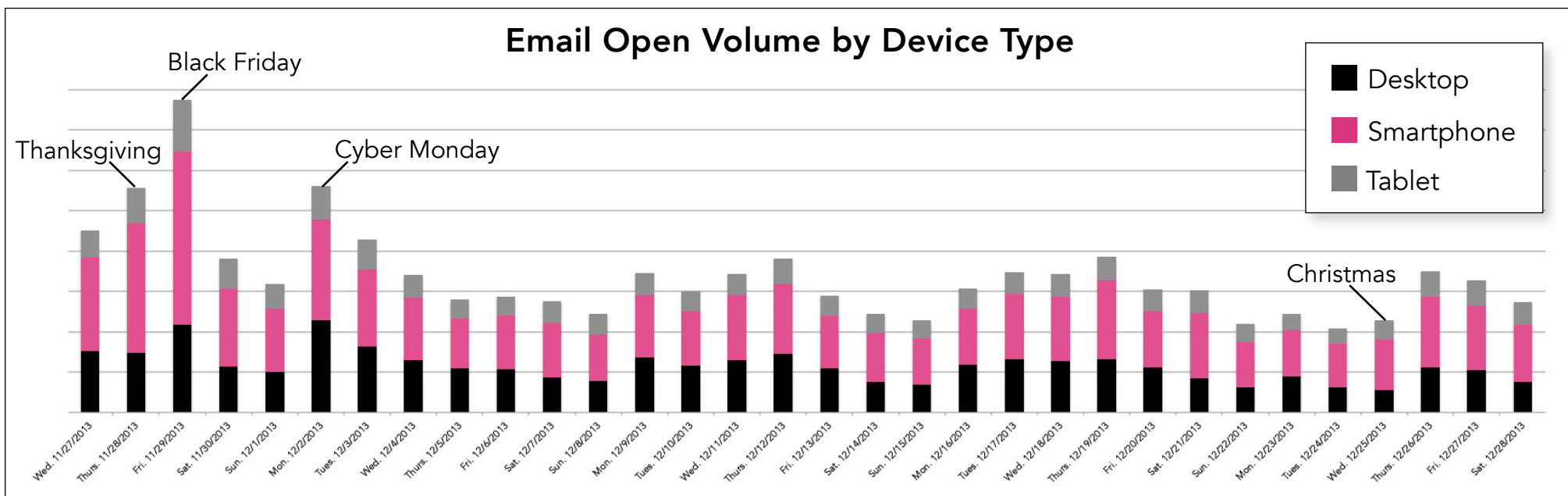
Q4 2013

Device preference	% of US states
Heavy desktop	0%
Leaning desktop	34%
Heavy smartphone	24%
Leaning smartphone	42%

By observing how this map has changed over the past three quarters, it is apparent that smartphones have made steady gains against desktops across the country.

In Q2 2013, six states (Maine, Montana, Vermont, Washington, Oregon, and Wyoming) exhibited "heavy" desktop use, meaning that more than 50% of recipients in each state opened email messages on desktops. The pool of desktop-dominant states narrowed in Q3 2013, to include only Maine and Vermont. By Q4 2013, desktop use did not surpass 50% of total email opens in any of the 50 states.

2013 HOLIDAY SEASON EMAIL OPENS



ABOUT THE REPORT

Methodology

Charts are based on data collected through Movable Ink's Agile Email Marketing platform between October 1 – December 31, 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.

Contact

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ABOUT MOVABLE INK



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

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