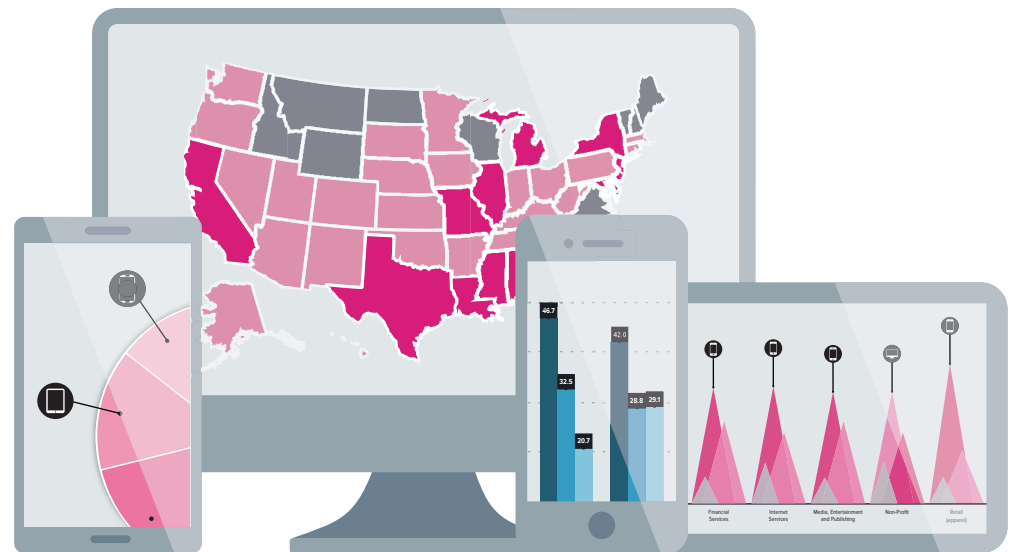




US Consumer Device Preference Report

Q2 2015: *Desktop Conversions Rebound*



EXECUTIVE SUMMARY

Movable Ink's US Consumer Device Preference Report was first released in 2013 and provides deep insight into consumers' adoption and use of smartphones, tablets, and desktop computers, and how they engage with email while using their preferred devices.

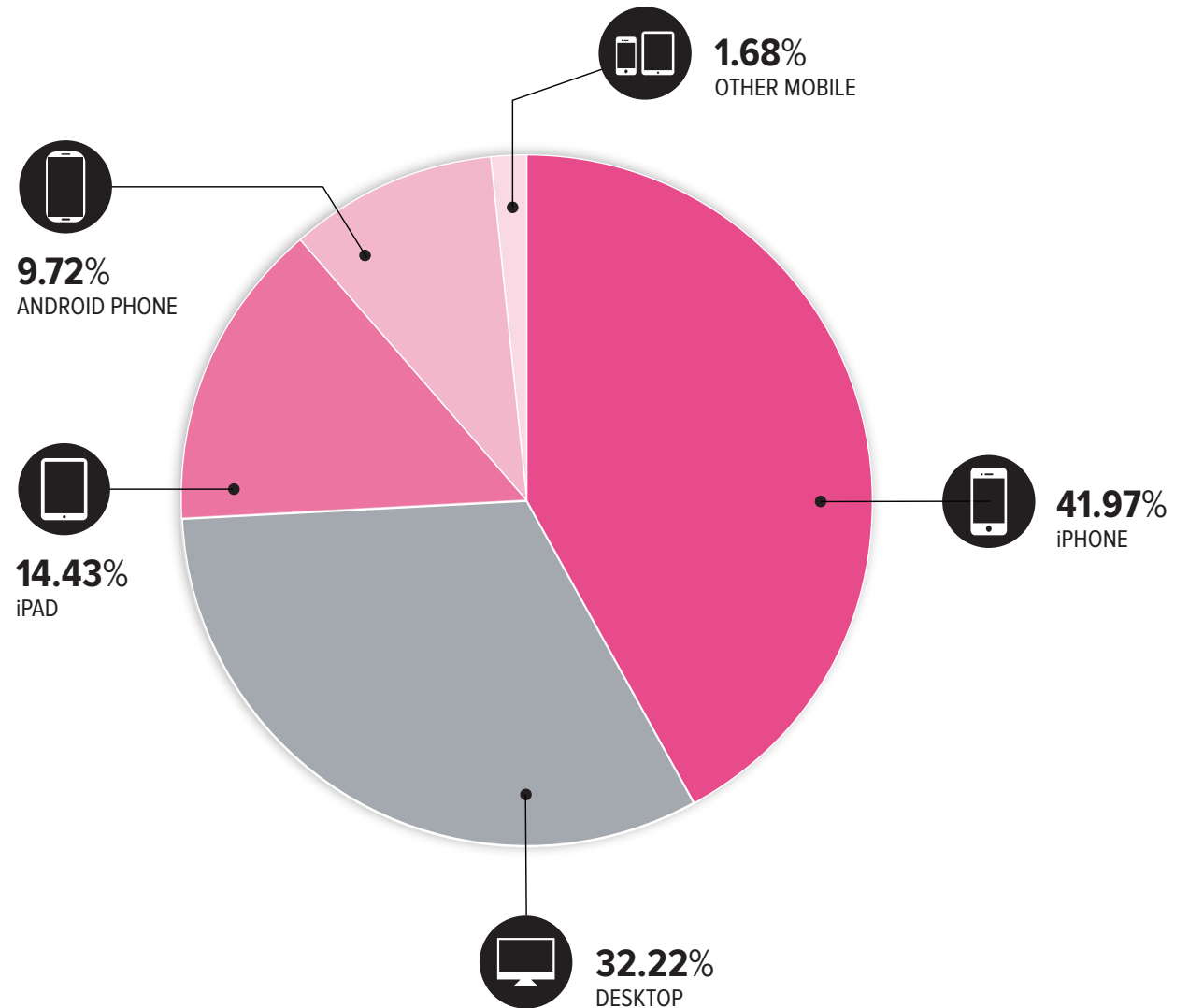
This edition of the US Consumer Device Preference Report is based on data collected in the second quarter of 2015, April to June. This Q2 report shows that although mobile dominates device preferences when it comes to opening emails, desktops still play an important part in the overall email experience.

KEY FINDINGS

- **Desktop Conversions Spike Again.** In our Q1 report, we noted that mobile email conversions (phone and tablet) surpassed desktop conversions for the first time ever. In Q2, we expanded the sample size and analyzed 267,000 conversions driven by email and discovered that desktop conversions rebounded. Desktop conversions increased from 37% in Q1 to 52.6% of all conversions in Q2. Smartphone conversions made up 29.3% of the total and tablet conversions made up the remaining 18.1% of conversions.
- **Mobile Opens Inch Upward.** Last quarter, we saw mobile email opens reach 67% and, in Q2, that number is still inching upwards, with 67.8% of all emails now opened on mobile devices.
- **Tablet Users Spend Less Time in the Inbox.** We've noticed that iPhone users have shorter attention spans than Android users, but can you guess who's less captive than both? Tablet users. Over 75% of iPad users and 58% of Android tablet users spend an average of 15 seconds or less, reading an email on their tablet.

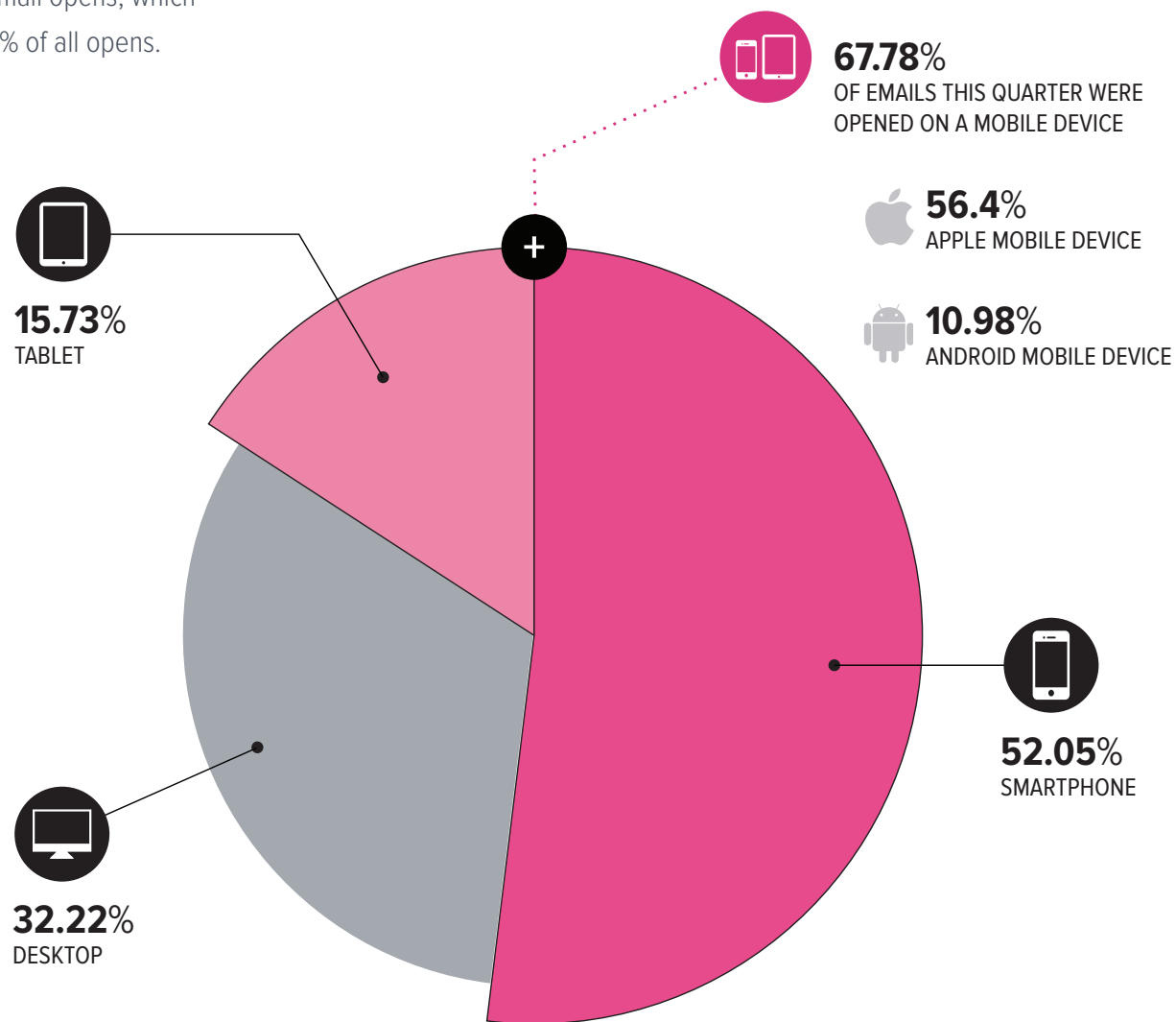
EMAIL OPENS BY DEVICE TYPE

In our complete analysis of 1.32 billion emails, we found that iPhones accounted for 41.97% of all opens, compared to 9.72% on Android phones. It's obvious that Apple remains the leader in the US tablet market as well, evidenced by iPads accounting for 14.43% of all email opens (versus 1.26% on Android tablets).



EMAIL OPENS BY DEVICE

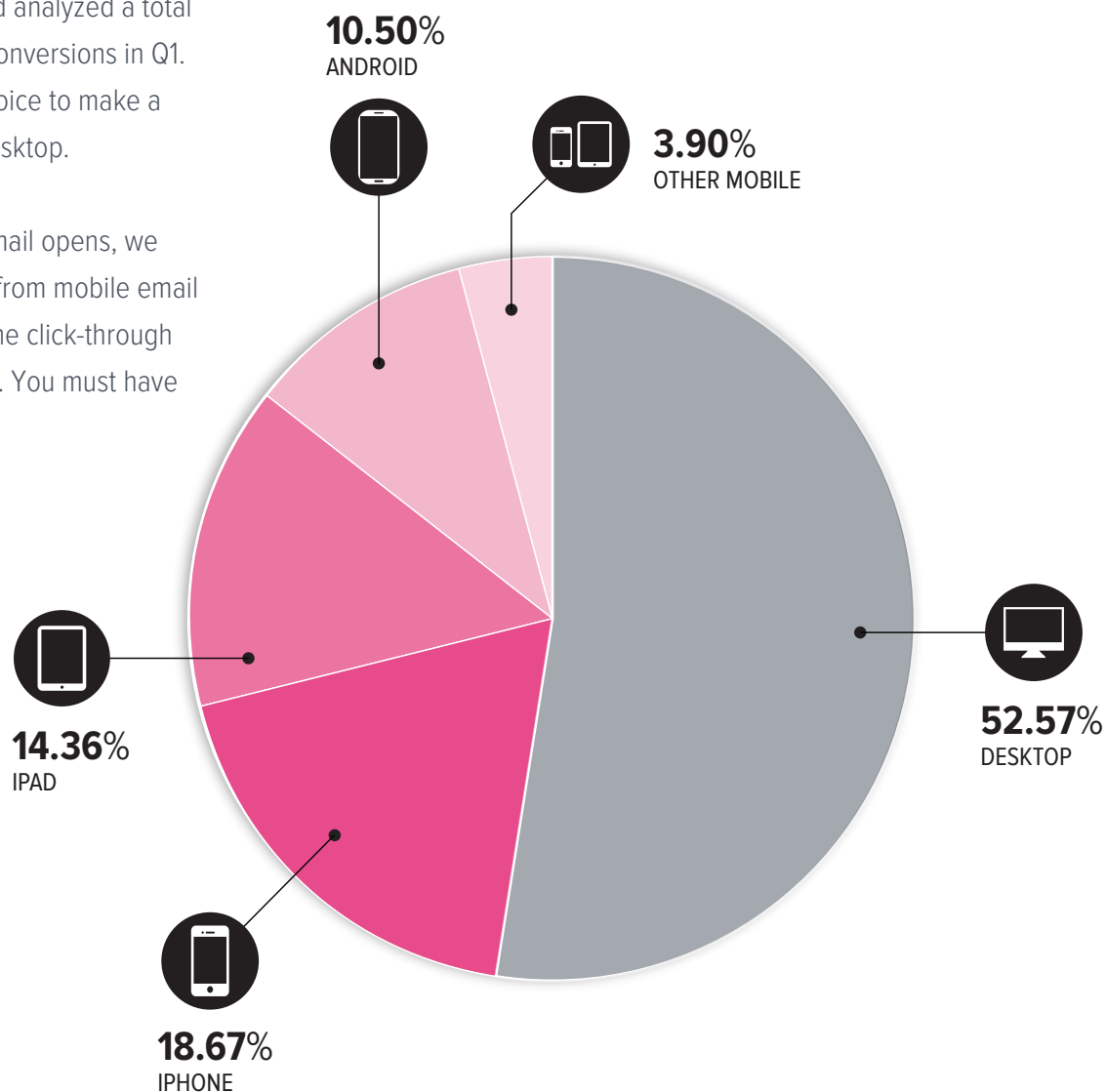
This quarter, the rapid growth of mobile email opens we saw in Q1 of 2015 has slowed down, but we haven't seen a plateau yet. Mobile email opens, which include both smartphones and tablets, accounted for 67.78% of all opens.



EMAIL CONVERSIONS BY DEVICE

Earlier this year, we conducted our first-ever analysis of conversions driven by email that took place on mobile devices and saw that 68.9% occurred on mobile devices. This quarter, we expanded the sample and analyzed a total of 267,000 conversions from email, compared to 57,000 conversions in Q1. Although it appears that desktops remain the device of choice to make a purchase, the split is almost equal between mobile and desktop.

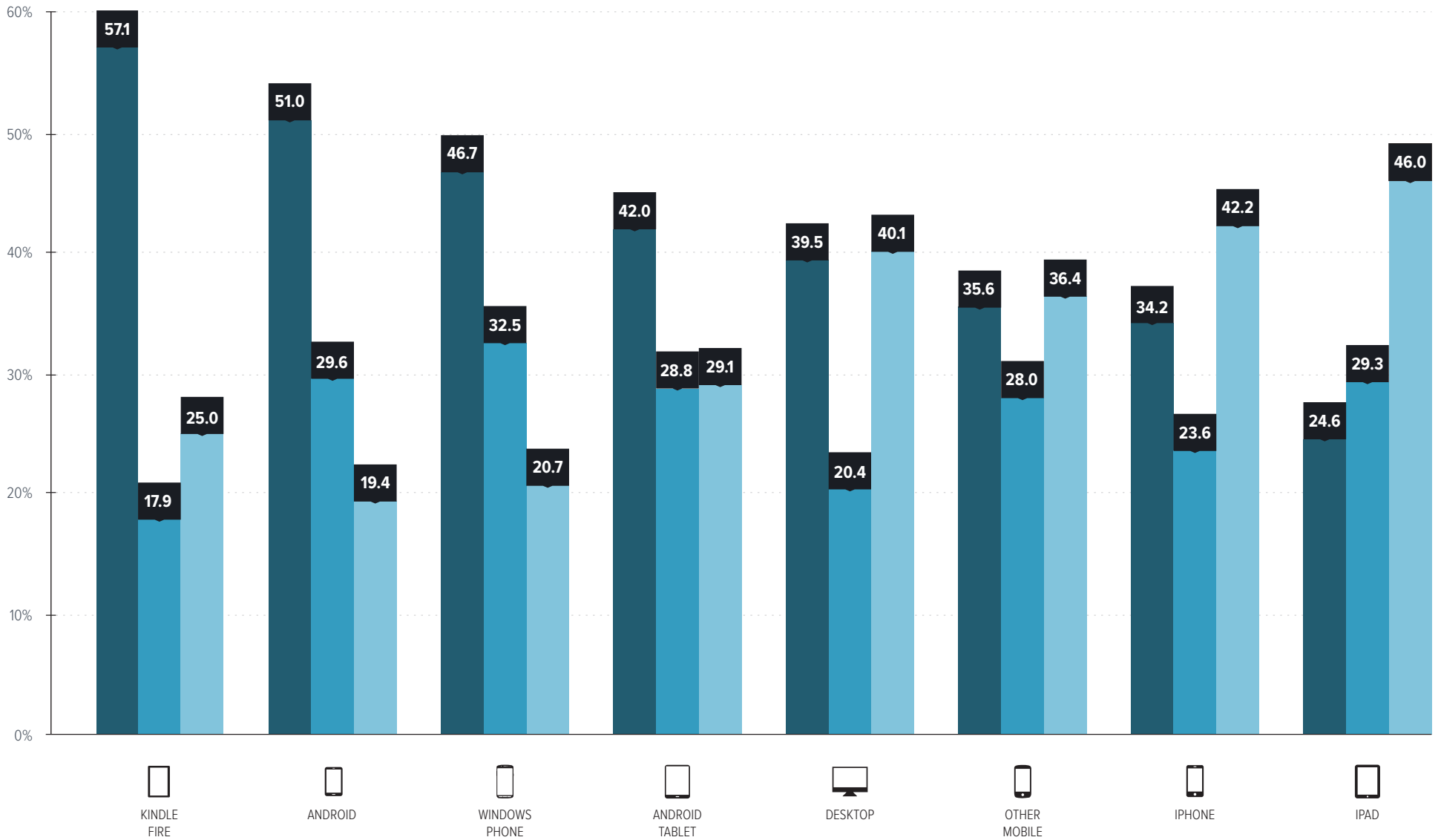
When you look at the device preference breakdown for email opens, we see that mobile wins at almost 70%. Why are conversions from mobile email not at the same level? We believe it to be an indicator of the click-through experience. It's not enough to build mobile-friendly emails. You must have a mobile-friendly site to complete the experience.



EMAIL READ LENGTH BY DEVICE*

0-3 SECONDS 3-15 SECONDS 15+ SECONDS

*Blackberry devices omitted because statistically insignificant

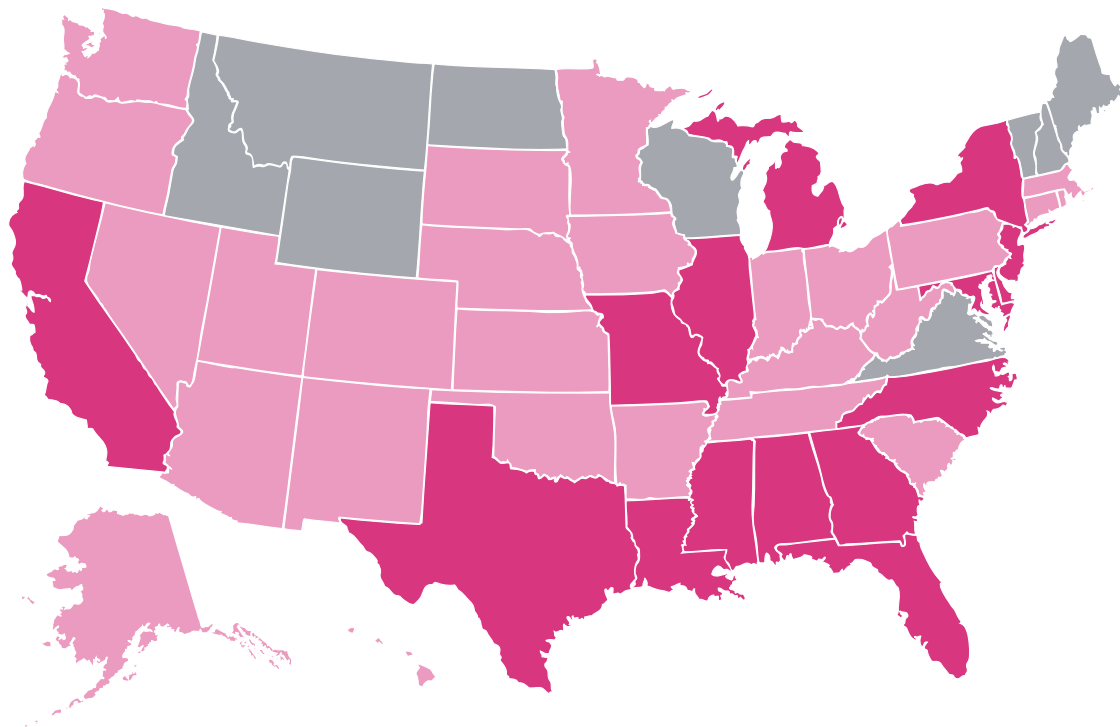


EMAIL OPENS BY US STATE

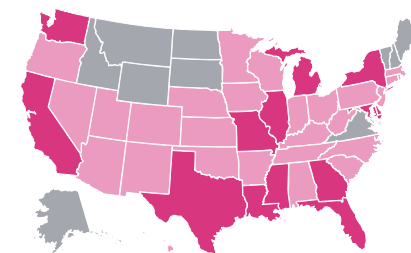
Every quarter, we analyze which devices are favored when it comes to opening emails. As seen in the maps below, the shift towards mobile continues. Since Q2 2014, there has been a dramatic reversal, and there are no heavy desktop using states and only 9 leaning desktop states.

DESKTOP vs. **SMARTPHONE**

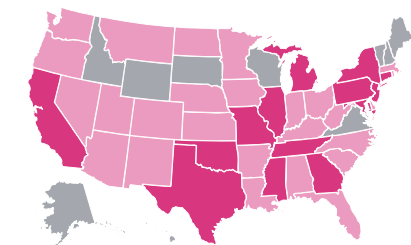
■ Heavy ■ Leaning ■ Heavy ■ Leaning



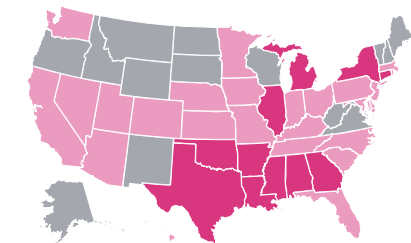
“Heavy” means that more than 50% of recipients in the state open email on a smartphone or desktop. “Leaning” means that fewer than 50% of recipients in the state open email on a smartphone or desktop, but that those devices are currently the most widely used in the state (e.g., if desktop had the highest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



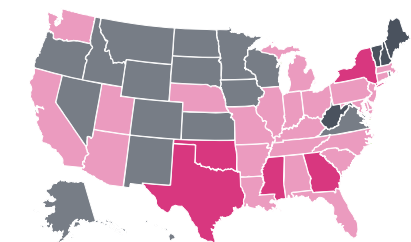
Q1 2015



Q4 2014

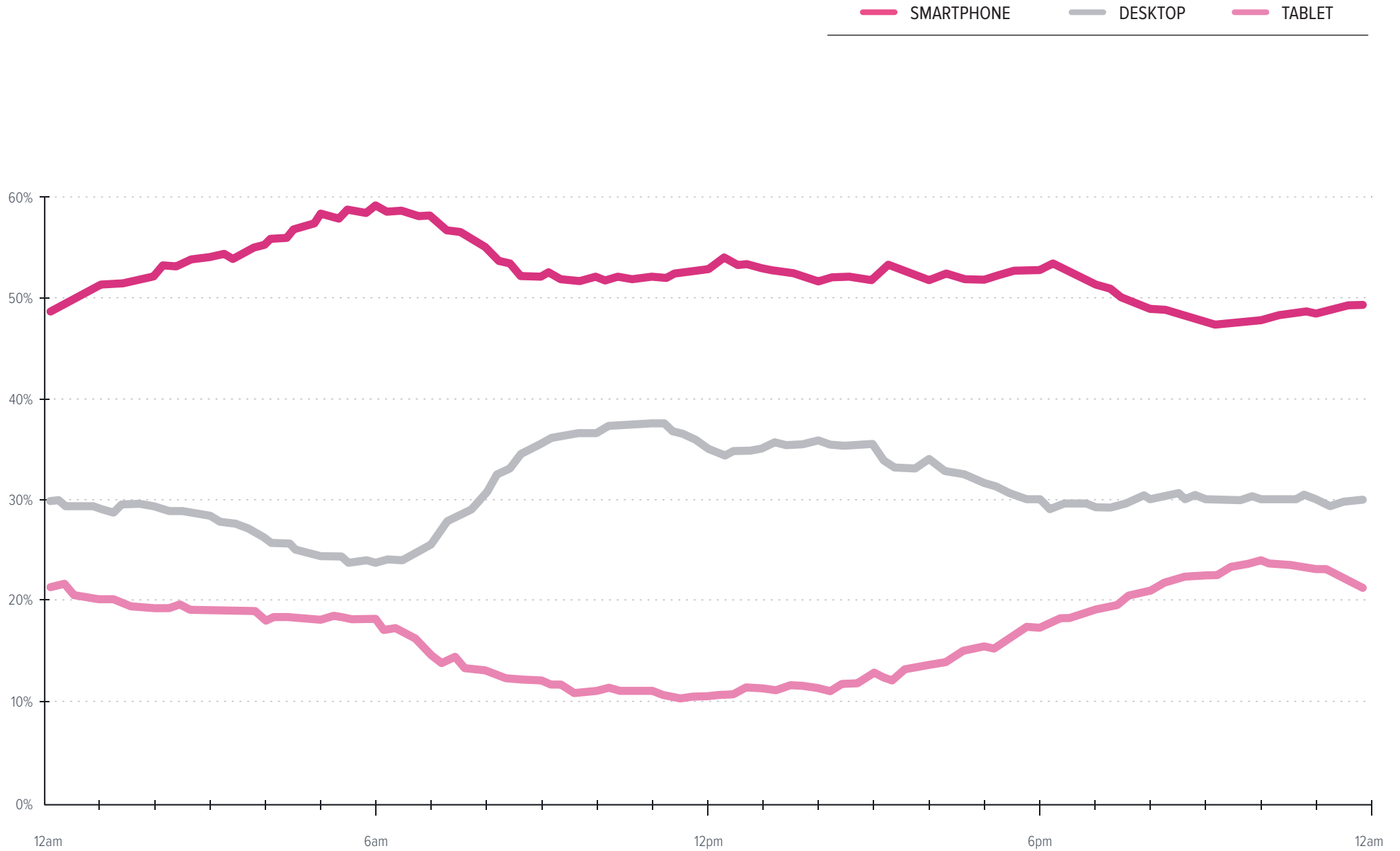


Q3 2014



Q2 2014

EMAIL OPENS BY TIME OF DAY

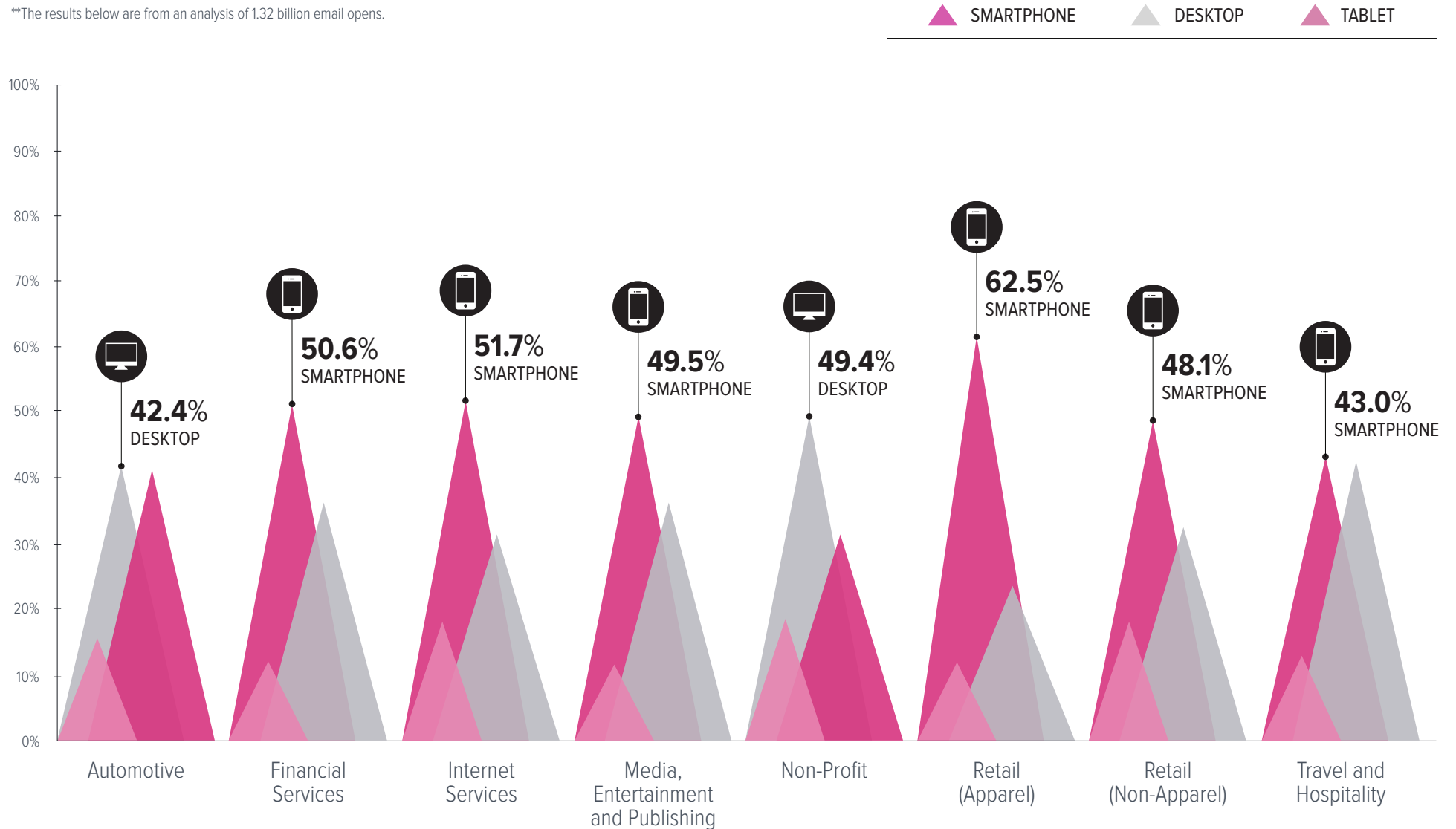


EMAIL OPENS BY VERTICAL

DEVICE PREFERENCE BY VERTICAL

The data last quarter showed that some verticals are far less mobile-friendly than others. But, when we analyzed email opens on tablets and smartphones against desktop opens this quarter, every single industry is mobile-first, except for Automotive and Non-Profit.

**The results below are from an analysis of 1.32 billion email opens.



ABOUT THE REPORT

METHODOLOGY

Charts are based on data collected through Movable Ink's contextual marketing platform between April 1 – June 30, 2015. They reflect aggregate statistics across Movable Ink's customer base, which includes more than 250 brands from the retail, travel, financial, media, and telecommunications industries and account for 1.32 billion email opens across the country unless otherwise stated. Because determining email opens requires images to the load, the percentages for some devices might be over or underrepresented.

CONTACT

For media inquiries, questions, or feedback on this report, please contact our research team at research@movableink.com.



ABOUT MOVABLE INK

Founded in 2010, Movable Ink pioneered the application of contextual marketing to email. Movable Ink clients can use any email service provider to deliver dynamic content that changes, in real-time, according to the context of each individual customer. More than 250 innovative brands including The Wall Street Journal, eBay, Finish Line, and Saks Fifth Avenue use Movable Ink to Market in the Moment and optimize their email campaigns to drive ROI. The company is headquartered in New York City with an office in London.

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