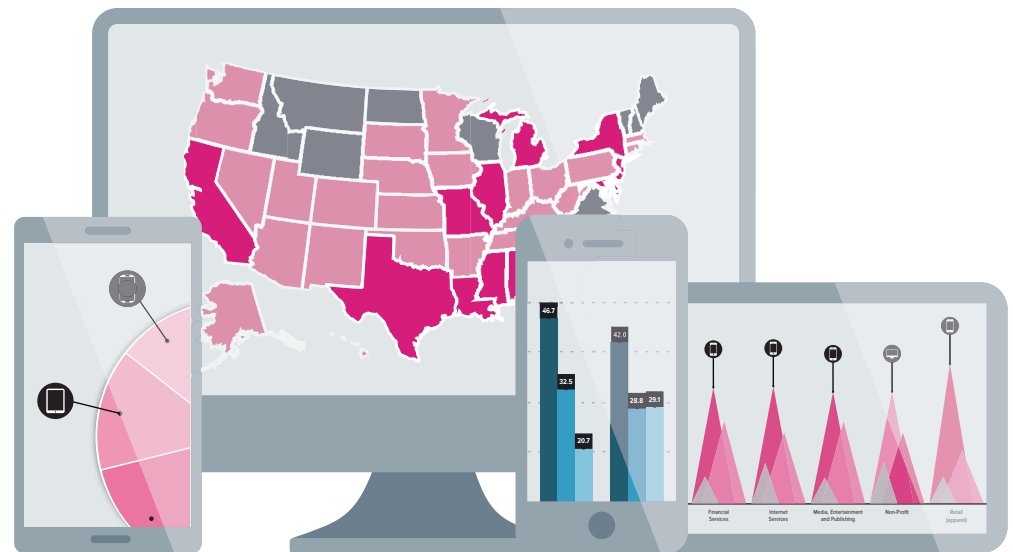




# US Consumer Device Preference Report

Q3 2015: *Mobile Opens Begin to Plateau*



# EXECUTIVE SUMMARY

Movable Ink's US Consumer Device Preference Report was first released in 2013 and provides 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 third quarter of 2015, July through September. This Q3 report shows mobile email open growth slowing down but a continuing trend towards mobile in other categories.

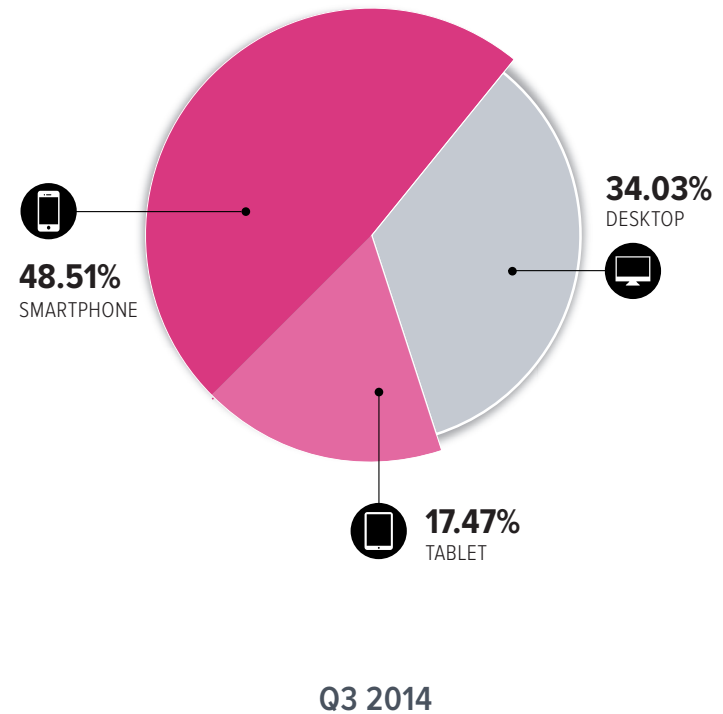
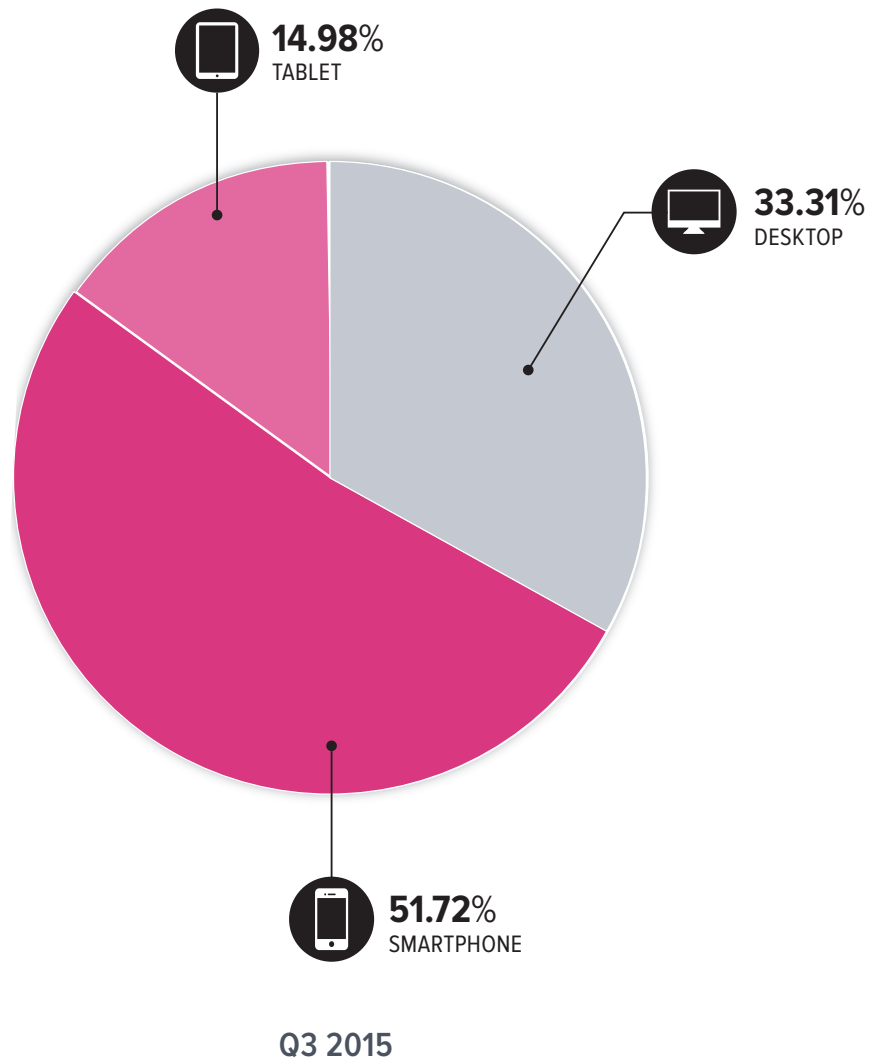
## KEY FINDINGS

- The steady growth in mobile email opens has slowed and shows signs of a plateau. We've seen consecutive quarters of increasing email opens on mobile devices over the past year, but Q3 experienced a slight dip. Mobile accounted for 67% of all opens in Q3 — a 1.08% drop from Q2.
- Only one vertical audience remains on the desktop-open preferred list. In Q3, 50% of the non-profit audience opened emails on a desktop computer. We've watched the desktop preference group shrink over the last two years and will keep an eye on the non-profit group to see if there will be an eventual shift to mobile as we expect.
- Retail apparel consumers show a significantly higher level of comfort converting on mobile devices than other industries. With 67% mobile conversions, it's the only consumer group that prefers spending money on mobile over desktop.

# OPENS BY DEVICE

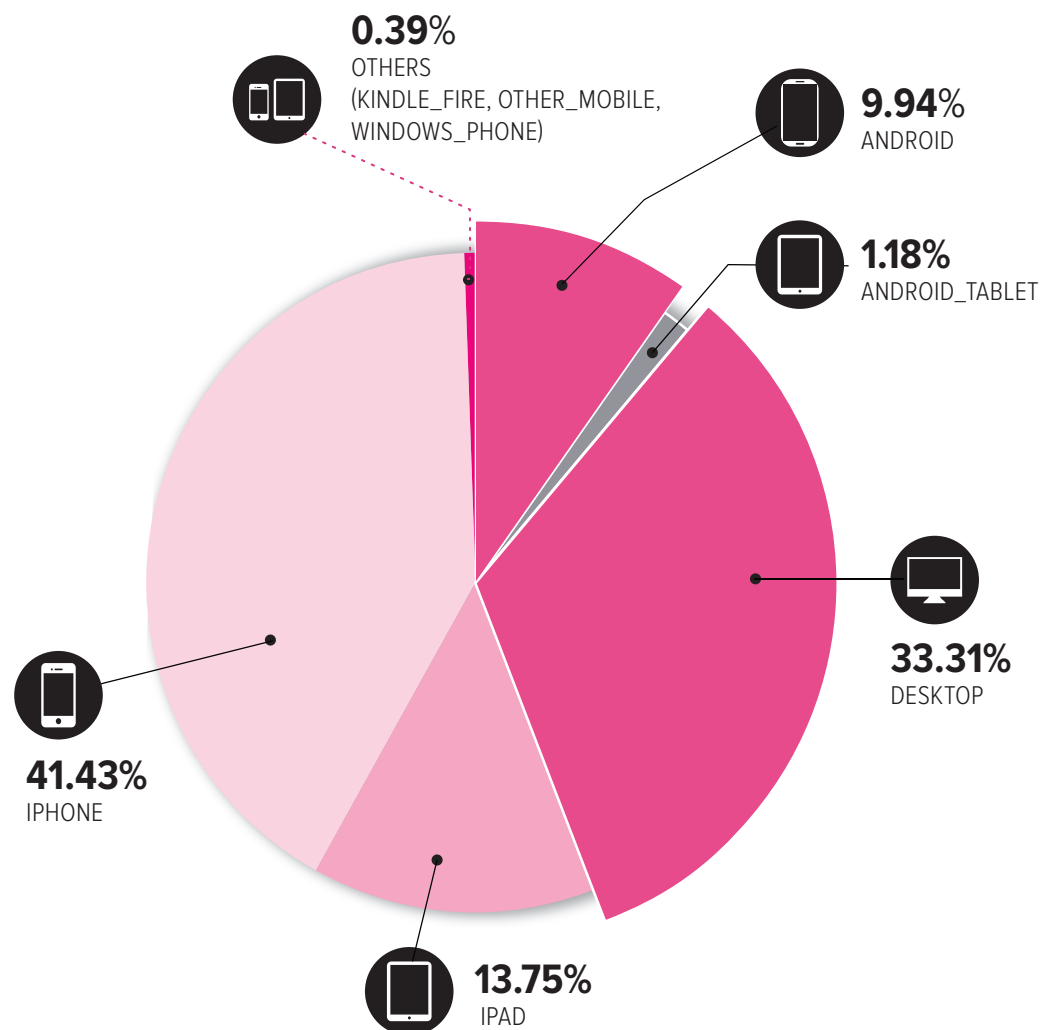
The continuous growth in mobile email opens we've seen in past quarters may be slowing down. Opens on smartphones stayed about the same at 51.72% (0.33% drop from Q2) and tablet opens accounted for 14.98% (0.75% drop from Q2).

Mobile opens are still higher than they were a year ago, although tablet opens have dropped 2.49% from 17.47%. Our reports show those opens remain in the mobile category, however, and have shifted to smartphone opens.



# OPENS BY DEVICE TYPE

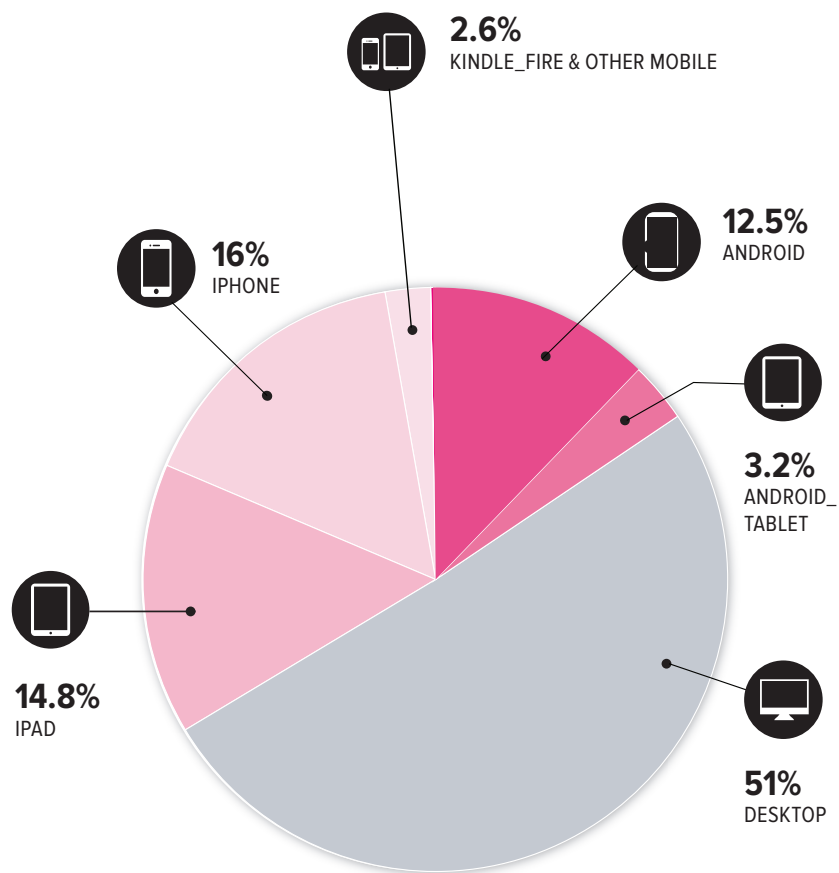
Of the 1.32 billion emails we analyzed, iOS devices accounted for most opens. iPhone opens remain about the same over last quarter at 41.43%, and 13.75% of opens happened on iPads. Desktop opens came in third at 33.31%.



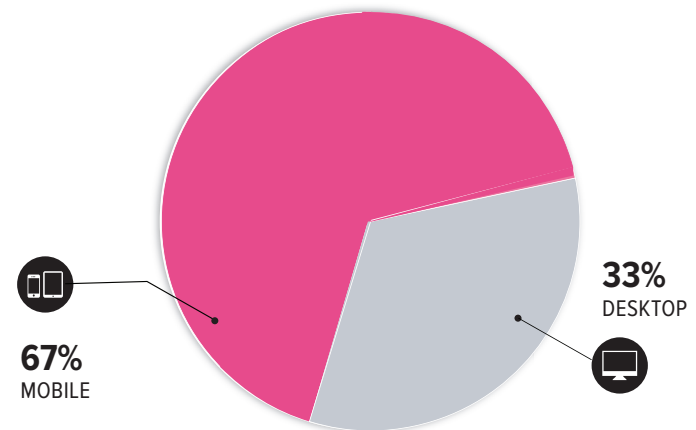
# CONVERSIONS BY DEVICE

Desktop squeaked by as the winner for email conversions at 51%. But one industry does show a significant preference for purchasing via email on mobile devices — mobile accounted for 67% of retail apparel email conversions.

While we do see a clear preference for opening emails on mobile across all verticals except non-profit (see Opens by Vertical), we consistently see a shift to desktop to convert. This may indicate a need for stronger mobile calls-to-action and improvements to mobile transactional emails that drive action and emphasize security and usability.



TOTAL EMAIL CONVERSIONS BY DEVICE

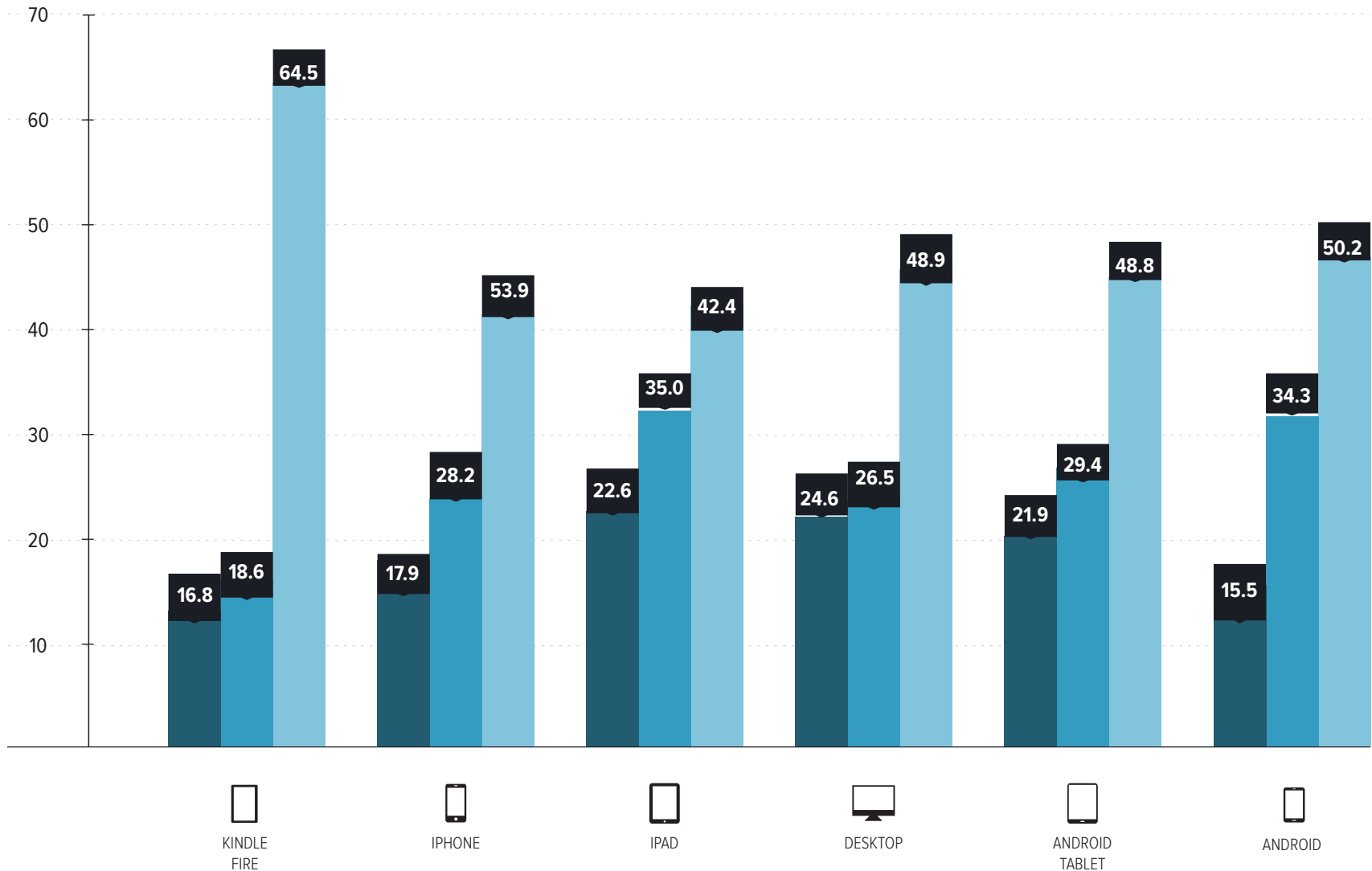


EMAIL CONVERSIONS: RETAIL APPAREL

# EMAIL READ LENGTH BY DEVICE

iOS may be the winner in many categories, but the Android tablet beat the iPad in time spent in email this quarter. And although fewer emails are opened on Amazon's Kindle Fire, its users spend significantly more time reading emails.

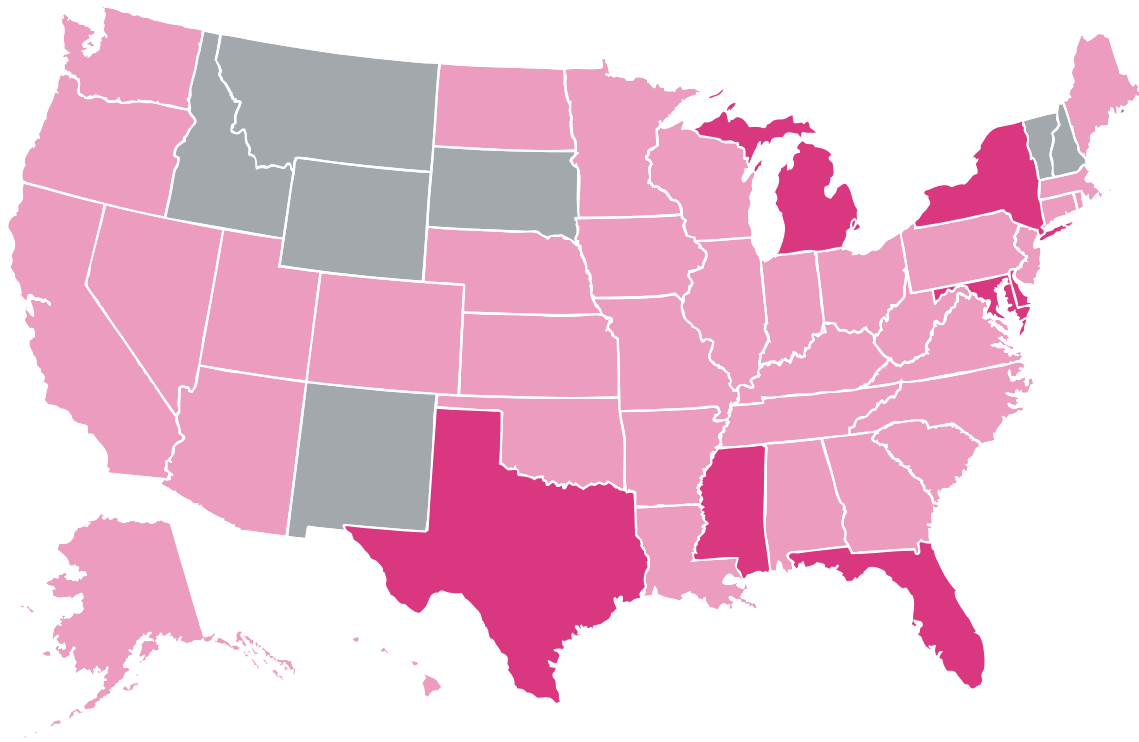
0-3 SECONDS    3-15 SECONDS    15+ SECONDS



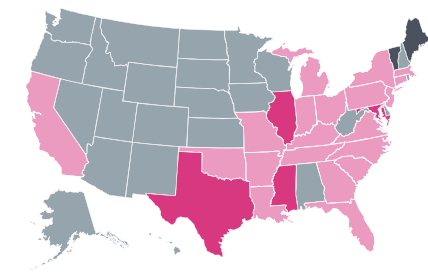
# OPENS BY STATE

Our nationwide analysis of opens by device continues to show an advancing preference for mobile. The number of remaining states more likely to use desktops when opening email is seven. But a look at the bigger picture over the past 3 years shows a significant shift away from desktop email opens.

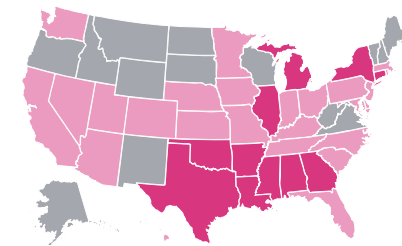
DESKTOP		vs.	SMARTPHONE	
■ Heavy	■ Leaning		■ Heavy	■ Leaning



**Q3 2015**



**Q3 2013**

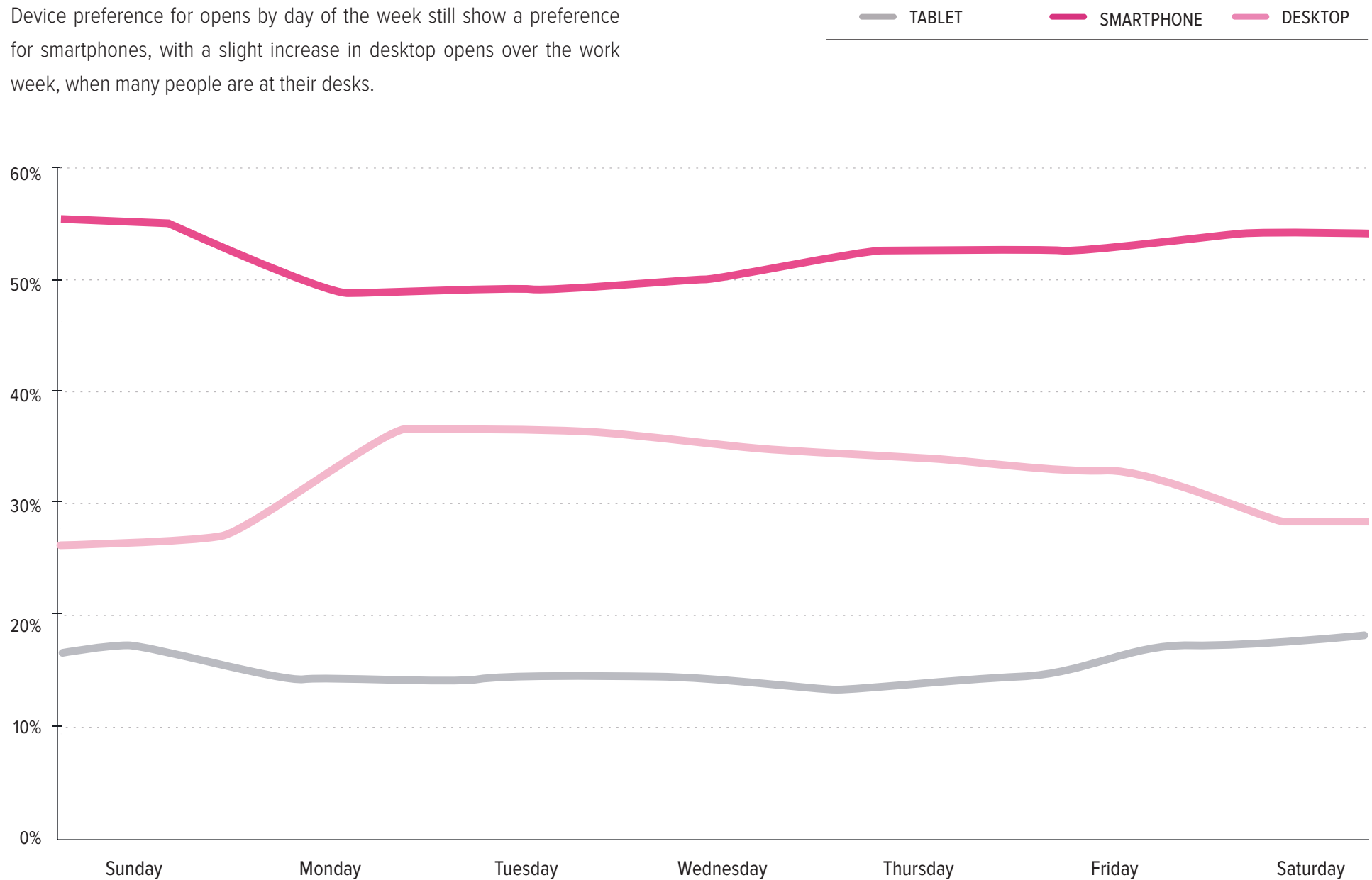


**Q3 2014**

“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.”)

# OPENS BY DEVICE: DAY OF THE WEEK

Device preference for opens by day of the week still show a preference for smartphones, with a slight increase in desktop opens over the work week, when many people are at their desks.

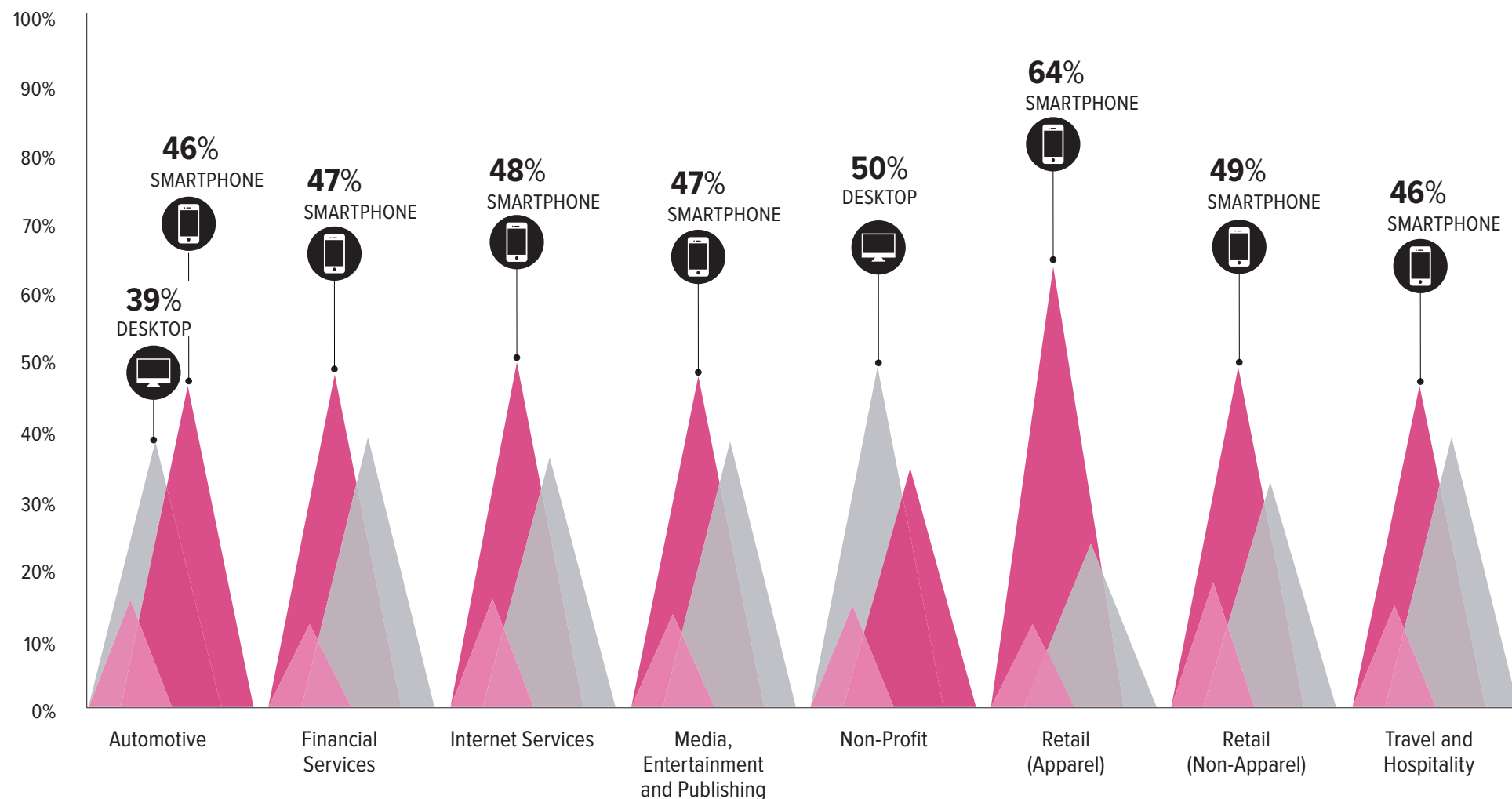




# OPENS BY VERTICAL

While consumers in most verticals prefer opening email on mobile devices, the non-profit audience remain loyal desktop users for opens. This quarter did see a new industry shift over to the mobile side. Of all automotive recipients — previously a desktop-first group — only 39% opened on desktops, a drop from 42.4% last quarter.

SMARTPHONE DESKTOP TABLET



# ABOUT THE REPORT

## METHODOLOGY

Charts are based on data collected through Movable Ink's contextual marketing platform between July 1 – September 30, 2015. They reflect aggregate statistics across Movable Ink's customer base, which includes more than 300 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 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](mailto: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 300 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 offices in London and San Francisco. For more information, please visit [www.movableink.com](http://www.movableink.com).



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