



# US Consumer Device Preference Report

Q1 2014: *Tablets Rising*



# EXECUTIVE SUMMARY

## Q1 2014: Tablets Rising

Movable Ink's US Consumer Device Preference Report 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.

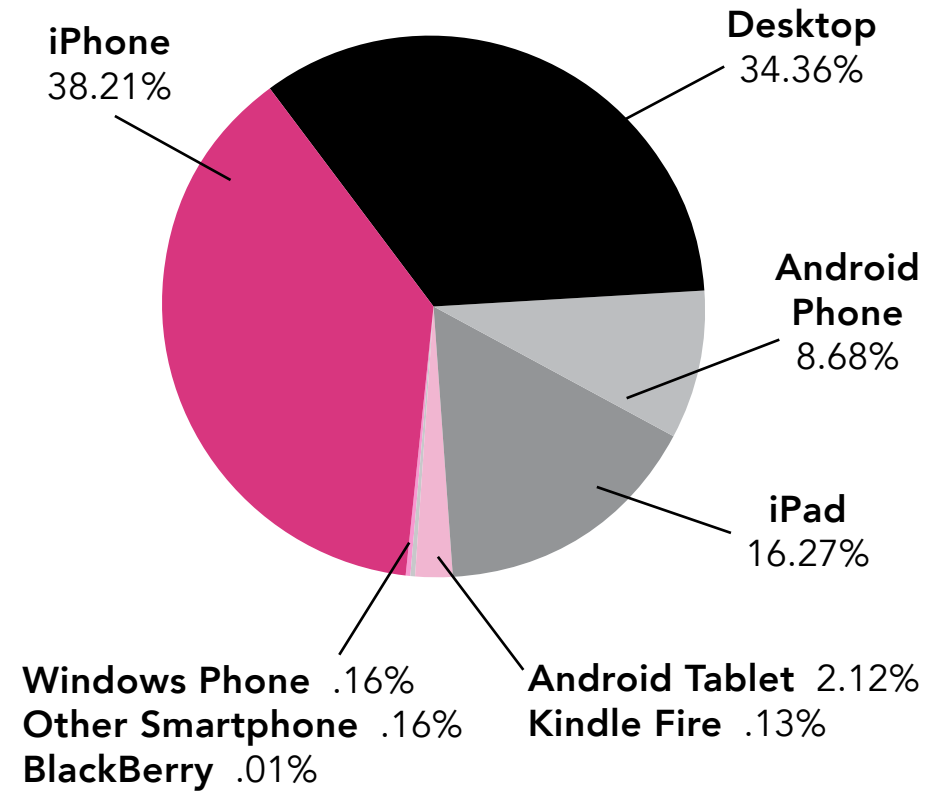
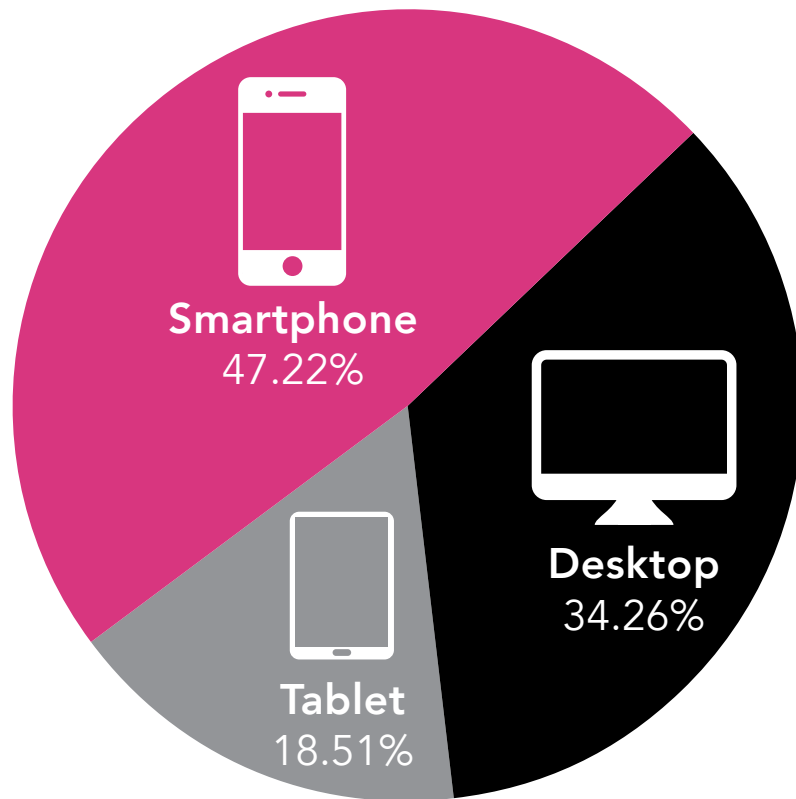
The Q1 2014 findings highlight the increasing popularity of tablets, which now account for nearly one in five email opens. In addition, Apple's iPhone and iPad products continue to widen their email dominance over Android devices. Finally, new to the Q1 report is an examination of how device use shifts based on time of day.


### Key Findings:


- **Mobile continued to grow.** Smartphones and tablets combined to account for 66% of all email opens, up from 65% in Q4 2013, and up from 62% when Movable Ink issued its inaugural US Consumer Device Preference Report in Q2 2013.
- **Tablets stole time-share from desktops – and from smartphones.** 18.5% of email was opened on a tablet in Q1, up from 16.5% in Q4 2013, and 13.8% when Movable Ink first started the research series. This marks the first time we've seen tablet use not just chip away at desktop time-share, but from smartphones as well (smartphones accounted for 47.2% of opens in Q1, versus 48.2% in Q4 2013).
- **Apple asserted its dominance over Android.** iPhones and iPads accounted for 54.5% of all opens in Q1, compared to 49.9% in Q4. Meanwhile, Android devices combined for 10.8% of opens, down from 14.4% in Q4.
- **But Android and Apple traded places when it came to time spent viewing emails.** Slightly more than 40% of Android smartphone users viewed emails for 15 seconds or longer, compared to 35% of iPhone users. In Q4, 38% of iPhone users lingered the longest on messages, compared to 35% of Android smartphone users.
- **Only 13 “desktop states” remain.** This number is down from 15 in Q4 and from 24 in Q2 2013. The “Electoral College of Email Opens” can now be described as a landslide for smartphones. In addition, in Q1 the state of Mississippi overtook Texas as the nation's top smartphone state.
- **Smartphone usage peaks in the early morning; tablets in the evening.** New data revealed how device usage varies by time of day over the quarter.

# EMAIL OPENS BY DEVICE

**66%** of emails were opened on a smartphone or tablet



**54%**   
Apple mobile devices

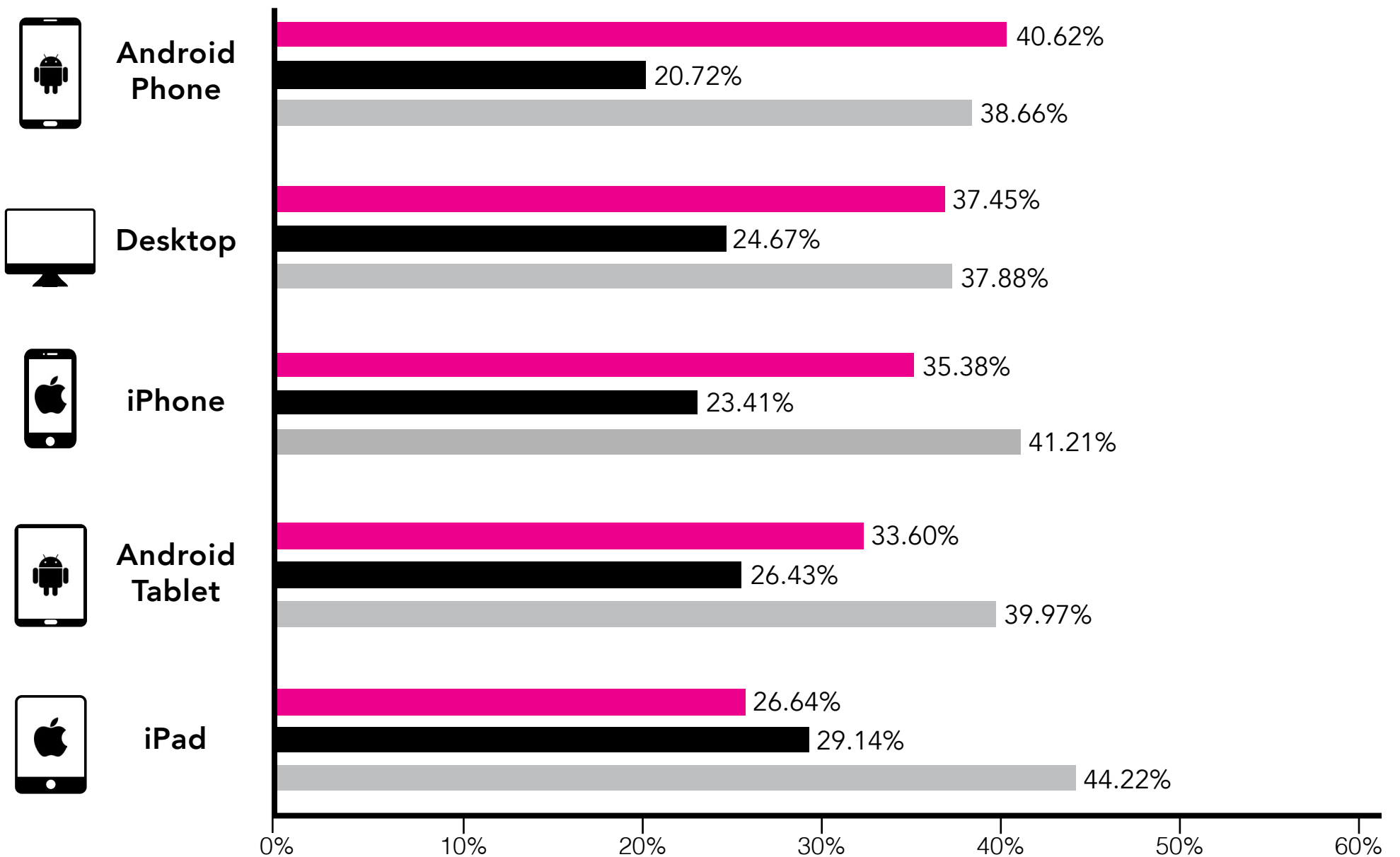
**11%**   
Android mobile devices

# EMAIL READ LENGTH BY DEVICE

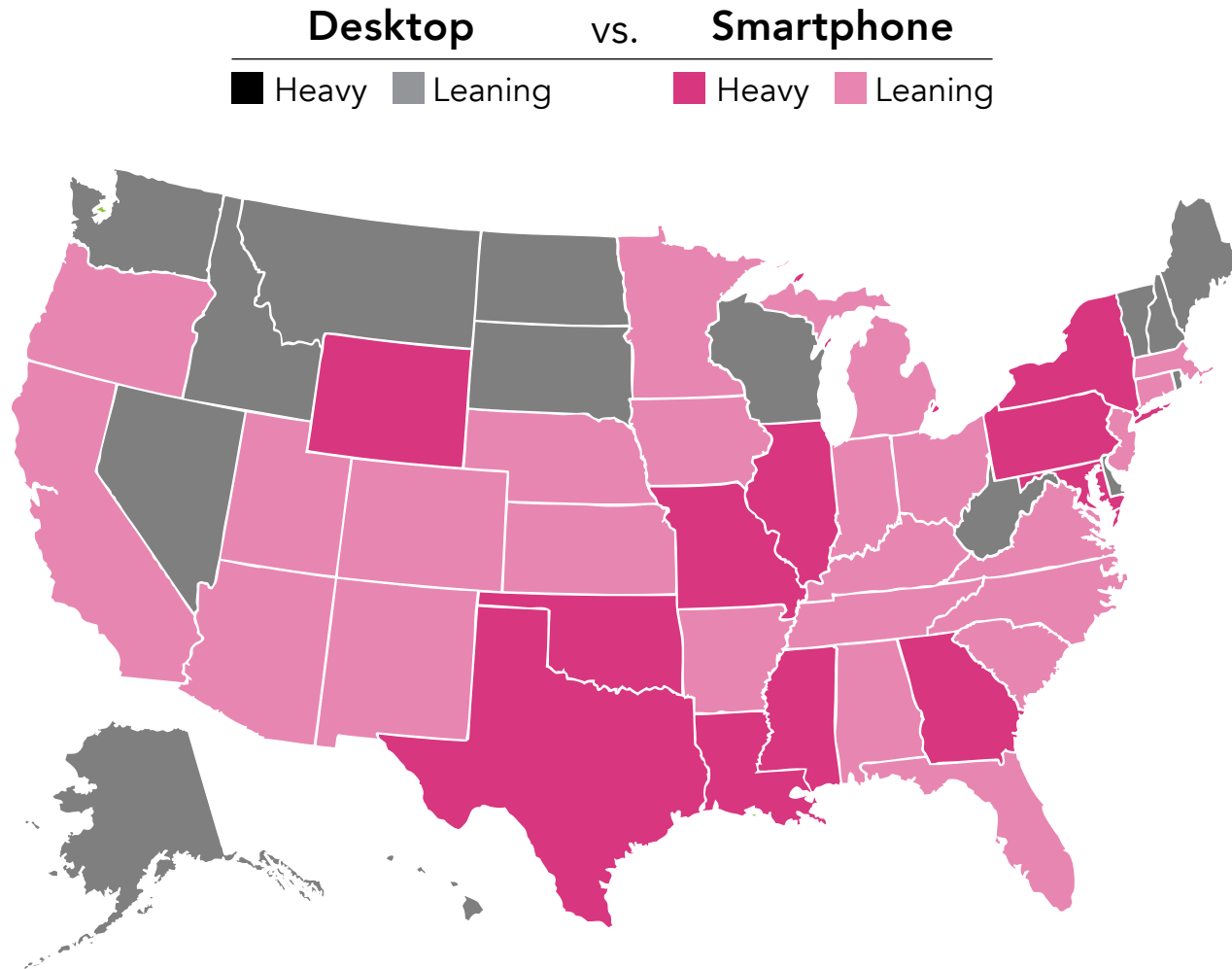
0 - 3 seconds

3 - 15 seconds

15+ seconds



# EMAIL OPENS BY US STATE



## Top 10 Smartphone States

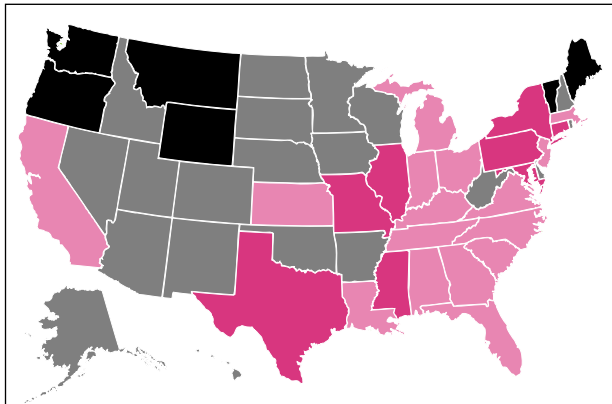
No.	State	% Smartphone
1	Mississippi	59.63%
2	Texas	56.78%
3	New York	52.97%
4	Illinois	52.70%
5	Pennsylvania	51.33%
6	Oklahoma	51.19%
7	Missouri	50.90%
8	Maryland	50.43%
9	Georgia	50.15%
10	Wyoming	50.15%

## Top 10 Desktop States

No.	State	% Desktop
1	Maine	46.58%
2	New Hampshire	44.40%
3	Vermont	44.40%
4	Montana	43.59%
5	South Dakota	41.98%
6	Nevada	41.47%
7	North Dakota	40.85%
8	Wisconsin	40.39%
9	Idaho	40.33%
10	Colorado	40.03%

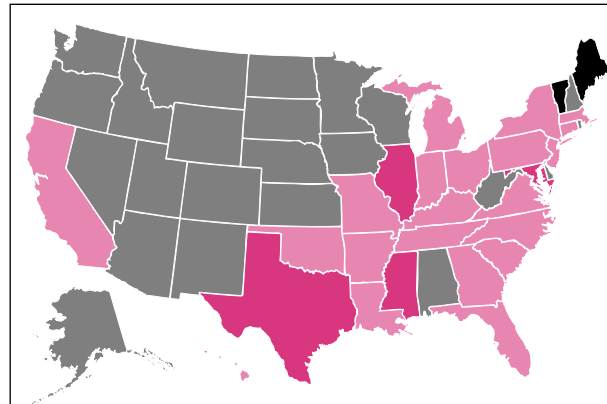
“Heavy” means that more than 50% of recipients in the state open email on a smartphone or desktop. “Leaning” means that fewer than 50% of recipients in the state open email on a smartphone or desktop, but that those devices are currently the most widely used in the state (e.g., if desktop had the highest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

# EMAIL OPENS BY US STATE



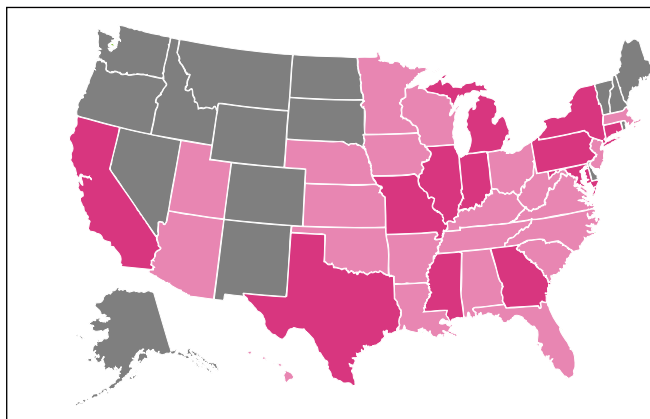
## Q2 2013

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%



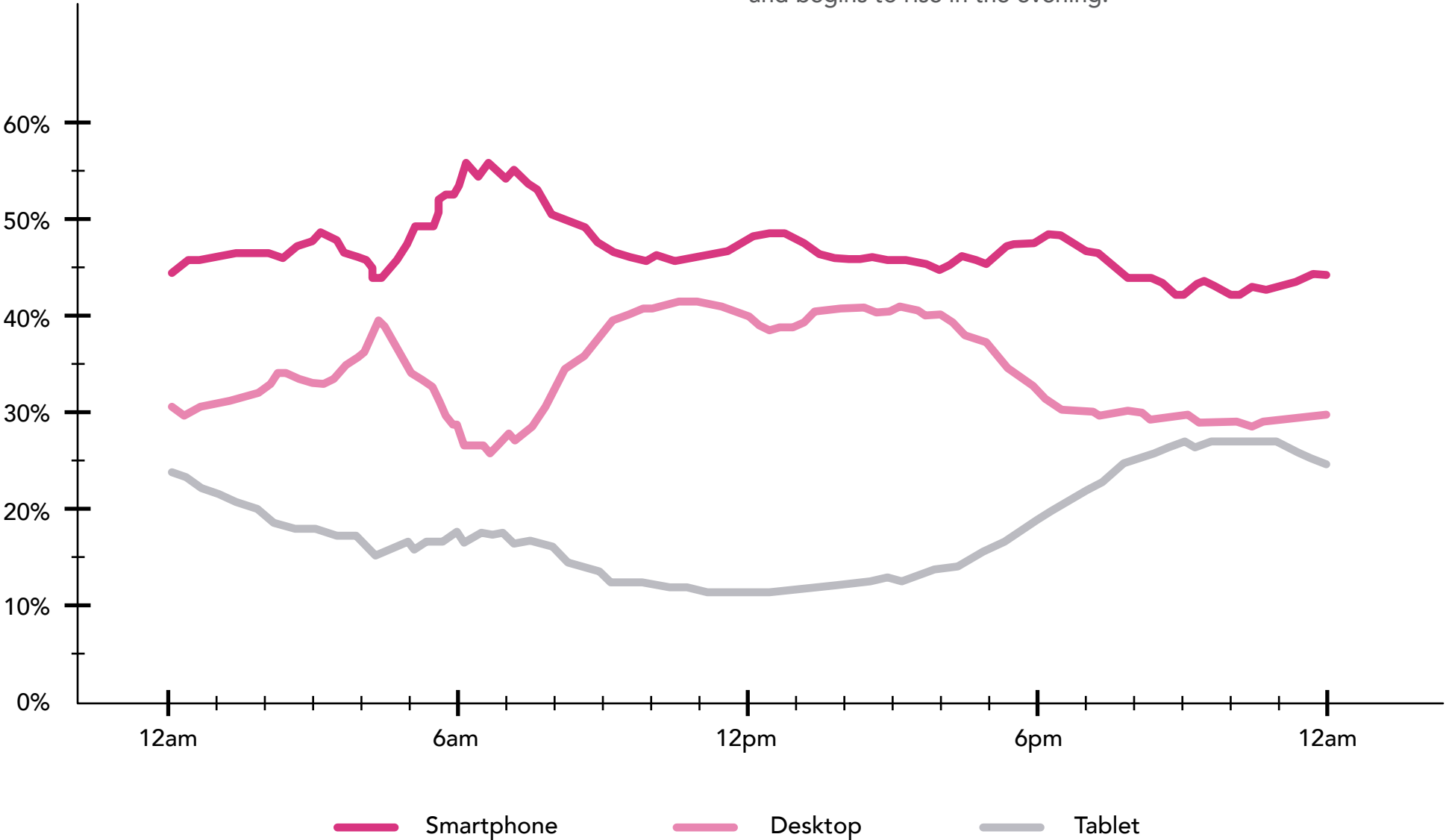
## Q4 2013

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

Our state-by-state analysis of smartphone versus desktop usage reveals the continued trend towards smartphone dominance. New additions to the smartphone family in Q1 2014 included Colorado, New Mexico, Oregon, and Wyoming. Meanwhile, West Virginia and Wisconsin moved back to the desktop-leaning column.

# OPENS OVER TIME

Smartphone usage always dominates, but peaks in the early morning hours, and gets closer to parity with desktops during the workday. Tablet use is relatively low throughout the day and begins to rise in the evening.



# ABOUT THE REPORT

## Methodology

Charts are based on data collected through Movable Ink's agileEMAIL platform between January 1 – March 31, 2014. They reflect aggregate statistics across Movable Ink's customer base, which includes more than 150 enterprise B2C marketers from the retail, travel, financial, media, and telecommunication industries. 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:

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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 agileEMAIL from Movable Ink, email can now be dynamically updated in real-time based on each recipient's time, location, device, and social context at the moment of open. Hundreds of innovative brands such as American Eagle Outfitters, Seamless, Lilly Pulitzer, and Finish Line 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 Venture Capital, Kima Ventures and email veterans such as Bob Pittman, Andy Russell, Josh Baer, and Alan Laifer.

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