

Mobile Email Opens Report

Q4 2010

By Knotice

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About This Report

Knotice (pronounced “notice”) provides efficient, effective, and highly-targeted marketing communications through today’s primary direct digital channels of email, mobile and the Web. Knotice’s on-demand software platform, Concentri®, is the only platform to natively unify the vital functions marketers need for direct, multi-channel digital marketing. As a result of Knotice’s focus and unique platform capability, the company is able to offer key insights on timely and relevant topics, in this case, the degree of email open activity occurring on mobile devices for permission-based email marketing campaigns.

Much has been written and reported on regarding the popularity of checking email on mobile devices. Convergence is clearly taking place. However, general surveys are often not actionable. And the reports that have been written on the topic have tended to be one-off snapshots with relatively small sample sizes (less than 100,000 emails sent).

Knotice will publish this report on a quarterly basis so marketers can observe trends overtime. As new mobile devices enter the marketplace they will be reported on as well.

If you are a marketer and would like to participate in the report, send an email to info@knotice.com with the subject “email mobile analysis” and we’ll provide you a snippet to include in your Q1 2011 email campaigns. We will report on your data in aggregate for the purposes of this report and we’ll also provide your results back to you. As you’ll discover in this report, having your individual results is critical. Although we look at mobile email opens overall, by industry, time-of-day, and geography, nothing has more influence on the mobile activity occurring in your email campaigns than the characteristics of your own prospects and customers.

Overall Mobile Email Opens by Device and Operating System (OS)

The following represents the percentage of all email opens occurring on a mobile device, by mobile operating system (OS) or device, based on a composite cross sampling of 155.3 million emails sent across 12 industry segments in Q4 2010. This first table also includes percentages for desktop email opens as a reference point. Subsequent tables that follow only contain mobile percentages.

	Mobile							Desktop			
	iPhone	iPad	Android	Windows	BlackBerry	Palm	Total	Windows	Mac	Linux	Total
	8.74%	2.00%	1.92%	0.31%	0.15%	0.25%	13.36%	70.27%	16.19%	0.18%	86.64%

Mobile is a dynamic environment made up of different combinations of device, OS, and browsers. Although the above is technically blending devices (iPhone and iPad) with operating systems (Android), we believe this is the most intuitive and useful way to look at the data for summary purposes. We do provide device-level detail for marketers participating in the report.

The above is not unexpected or atypical. The iPhone clearly dominates in terms of email interaction, even as the number of Android devices in-market surpasses iPhones in the latter part of 2010. With the recent Verizon announcement bringing iPhone 4 to their network, it will be interesting to see if this domination continues, or grows. The data suggests the level of email interaction from Android devices isn’t tracking with its overall market penetration. The very low email interaction rate for BlackBerry devices, surprising considering their market share and legions of enterprise users, may be a result of the default text-only email rendering BlackBerry is known for. Like traditional email open reporting, mobile opens are recorded when images are downloaded, so viewing text-only email may mask the true interaction levels.

The fact iPad already shows the second-highest level of email interaction is relatively surprising given its short time in the market and overall share compared to Android and BlackBerry devices. This may indicate that tablet users are a different animal altogether, who may be accessing email as a replacement for, not a supplement to, a desktop experience. At this time, we are not breaking out tablets as a separate category within the report.

Mobile Email Opens by Industry Segments

	Mobile						
	iPhone	iPad	Android	Windows	BlackBerry	Palm	Total
Association	6.72%	0.94%	0.94%	0.17%	0.05%	0.22%	9.05%
B2B	2.07%	0.29%	0.29%	0.24%	0.10%	0.05%	3.03%
Cable & Telco	7.99%	1.65%	1.65%	0.32%	0.16%	0.26%	12.03%
Consumer Product	9.90%	1.62%	1.62%	0.14%	0.63%	0.19%	14.11%
Consumer Service	11.38%	1.65%	1.65%	0.56%	0.11%	0.26%	15.61%
Education	7.72%	0.82%	0.82%	0.40%	0.20%	0.24%	10.21%
Entertainment	4.81%	1.09%	1.09%	0.30%	0.22%	0.13%	7.63%
Financial Services	17.58%	0.53%	0.53%	0.04%	0.17%	0.54%	19.38%
Health Care	6.50%	2.05%	2.05%	0.02%	0.00%	0.17%	10.81%
Hospitality	10.68%	2.15%	2.15%	0.30%	0.26%	0.20%	15.74%
Other	6.70%	1.51%	1.51%	0.20%	0.04%	0.06%	10.01%
Retail	11.99%	3.73%	3.73%	0.28%	0.08%	0.27%	20.08%

Above we break down the summary by specific industry segment. It's important to note how much customer behavior and the brand relationship influences the penetration of mobile in the email channel by industry segment. For example, a much smaller percentage of people read business-to-business emails from their mobile device (3.03%) as compared to emails from retailers (20.08%) or information from financial services (19.38%) where there is a deeper, more personal brand relationship. One must consider the situational context of mobile use as it pertains to brand.

Same Company, Different Brands

	Mobile						
	iPhone	iPad	Android	Windows	BlackBerry	Palm	Total
"Family" Brand	14.83%	4.95%	1.65%	0.22%	0.06%	0.35%	22.07%
"Metro" Brand	24.29%	4.42%	2.87%	0.19%	0.24%	0.38%	32.38%

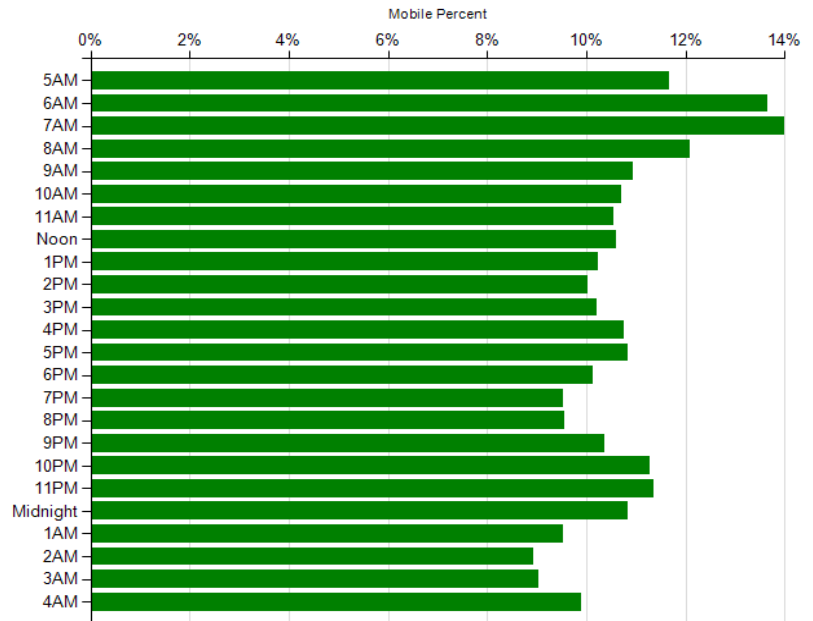
Consumer behavior and the context of the brand interaction is a key factor. Above is a comparison of two distinct brands managed by the same company. Both are considered high-end brands offering lifestyle consumer goods and home furnishings. While both brands are upscale, the brand identified as "Family" targets professional, style-conscious parents with younger children while the brand identified as "Metro" targets younger and pre-family consumers in a more metropolitan setting.

Both have seemingly high penetration of email opens via mobile. However, note the 10% difference between the two. Be aware that many factors come together to influence mobile results, but the demographic profile of the customer always plays a significant role. It's critical that marketers not only track and measure mobile interactions for their own campaigns, but do so within specific customer segments, where demographics can dramatically influence results and guide when and how email campaigns should be mobile optimized.

Mobile Email Opens by Time-of-Day

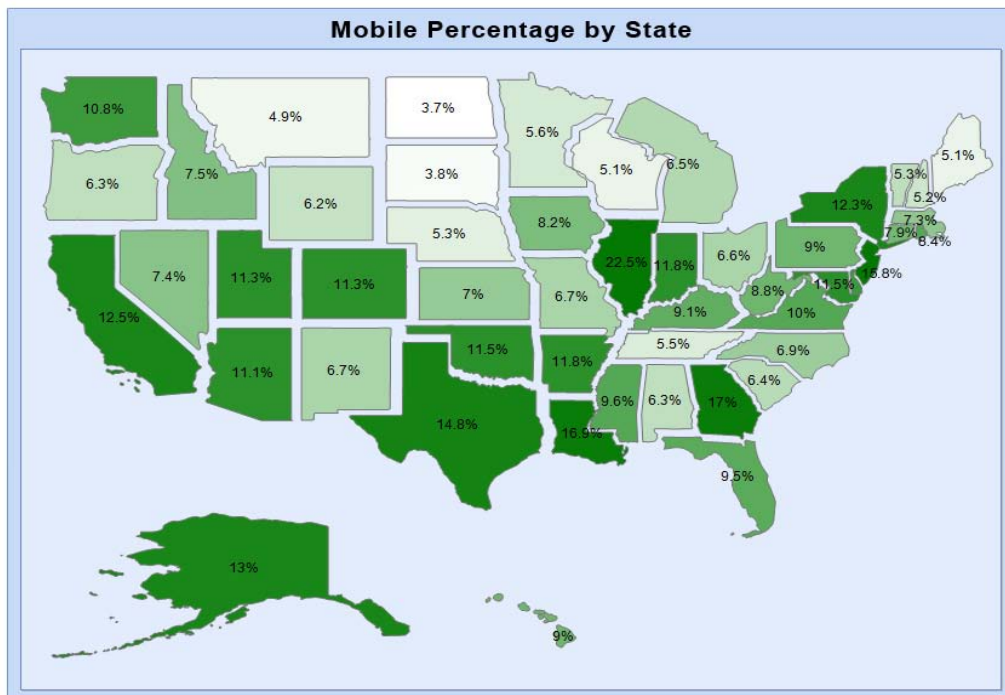
Breaking down the percentages of all emails opened by time-of-day reveals consumer behavior patterns that many readers may associate with personally. The ratio of mobile activity spikes noticeably in the early-morning hours, presumably as mobile phone users are waking up and checking email before starting their day. Many professionals can relate to this mobile phone use case, and this clearly underscores the fact that many if not most mobile phone users keep their device on, and nearby, 24 hours a day.

Not surprisingly the ratio of mobile activity drops during the traditional working hours where consumers presumably are more engaged with a desktop device, with only a slight peak in activity towards the end of the work day (4pm to 5pm). Mobile activity dips during the traditional dinner and early prime-time hours, with a final spike in the late evening.



In addition to understanding how the demographic profile of segments of the overall email list may impact decisions on how to optimize email for mobile viewing, marketers should understand how targeting certain times of day with email delivery can intentionally or unintentionally impact the ratio of mobile interactions. For instance, sending email in the very early morning, as many marketers do, may determine an increase in the ratio of mobile interactions as consumers scan their inbox first thing in the morning, in contrast to an email delivered mid-day where more consumers are more likely to view the email in a traditional desktop setting.

Mobile Email Opens by State



Breaking down the percent of all email opens occurring on mobile devices by state yields some interesting and potentially surprising results. Common sense says the ratio of mobile interaction with email may be much higher in coastal states and larger, metropolitan markets. And while that may hold true, as seen by the relatively high rates seen in states like California, Texas, Illinois, New York and New Jersey, this common sense approach may not successfully account for the equally high percentages of mobile interaction seen in states like New Mexico, Arizona, Oklahoma, Arkansas, Indiana and Alaska.

Also contributing to surprising data by geography is methodology: Identifying the location of the mobile open is based on IP address, not on explicit location data such as billing address or GPS. Geo-location by IP address – whether in a mobile or desktop context – is not 100% accurate, but can serve as a general indicator.

This data seems to challenge some of the common sense assumptions, but also calls for more granular data comparing metropolitan areas with suburban and rural to make better determinations. In either respect it is clear that marketers need to understand the demographic profile of their opt-in email list and make informed decisions on mobile-optimization of email based on this, as opposed to geography alone.

Get Your Mobile Email Opens

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About Knotice

Knotice (pronounced "notice") maximizes the ROI of direct digital marketing – interactive marketing communications that can be addressed to a specific individual – through process automation, increased relevance and improved performance. Working with clients across many industries – including retail, hospitality, restaurants, cable and telco, and many more – Knotice provides efficient, effective, and highly-targeted marketing communications through today’s primary direct digital channels of email, mobile and the Web. Whether a company is seeking a top-tier channel specific software solution, or a complete direct digital marketing solution that spans all channels, Knotice saves its customers time and money while improving content relevance and campaign performance.