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rpinfo@returnpath.net

1-866-362-4577

Mobile, Webmail, Desktops: Where Are We Viewing Email Now?

Being a marketer now is more complicated than it has ever been. There are more channels than ever before for communicating with both customers and prospective customers.

Knowing where to invest your resources (time, energy, and budget) is an important element for success. Having current and relevant data is the key to making intelligent decisions.

In this second report on the impact mobile is having on email viewership, Return Path takes a look at the rapidly shifting trends and where people are viewing their email now.

What's Inside:

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Executive Summary

- Mobile platforms are gaining ground when it comes to email viewership with a 34% increase since our last study which looked at data from October 2010 through March 2011. Webmail is still the most popular platform for reading email, but mobile is showing huge growth rates whereas webmail and desktop decreased by 11% and nearly 9.5%, respectively.
- Where email is viewed is heavily influenced by when it is viewed, with desktop ruling the weekdays and mobile spiking on the weekends.
- The use of the iPad for viewing email has exploded with a 73% increase in email opens.
- If you are viewing email with installed software on a desktop, you are viewing it in Outlook or Apple Mail. All other platforms combined make up a tiny share of the total desktop views.

Where is Email Most Often Read?

It might be a little hard to believe given all the ink that gets spilled covering the mobile revolution, but webmail continues to be the dominant platform for email use, followed by desktop and mobile devices.

While mobile still represents the smallest piece of the email open pie, it is showing a pattern of increasing usage that is impossible to ignore. In fact, Return Path data shows that email opens on mobile devices is up by 34% from April 2011 through September 2011, as compared

Definition of Terms

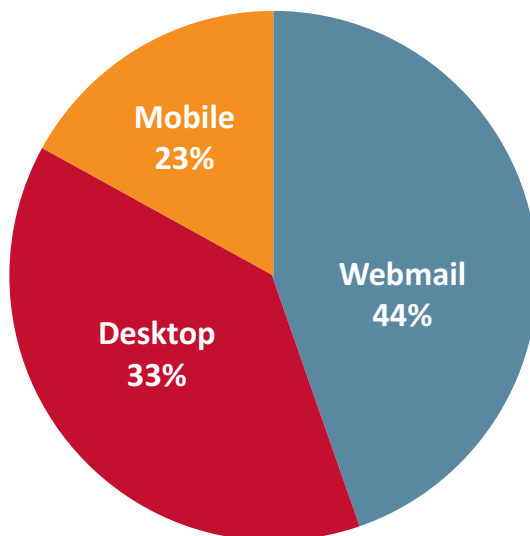
Mobile: Generally speaking, this term is pretty broad and is taken to mean SMS messaging, apps, the mobile web and more. For this report, we mean mobile email, not SMS, but those opens are recorded wherever the user is within the mobile environment. So, that includes the native email client, email opens on a mobile web browser or within an email app. This also means we include opens on both smartphones and tablets.

Desktop: This term refers to installed software that is viewed on a computer, be it a desktop or laptop computer. Does this mean these are only B2B addresses, not consumer addresses? Mostly, but not necessarily. First, there are consumers that own domains and have email addresses at those domains delivered to an installed software client. Second, some people POP their webmail (Yahoo!, Hotmail, etc.) into installed software like Outlook. In that instance, our Campaign Insight tool would count that as a desktop view, not a webmail view.

Webmail: These are emails viewed within a webmail environment like Yahoo!, Hotmail and Gmail on a computer. Our Campaign Insight tool doesn't count email viewed on the webmail viewer of a mobile device such as a smartphone or with a web browser or a tablet like the iPad as webmail, but rather as we noted above, these opens are captured as mobile.

with the previous six month period. The relative number of opens on webmail and desktop decreased by 11% and nearly 9.5%, respectively.

Where Email is Read: Webmail, Desktop and Mobile Views



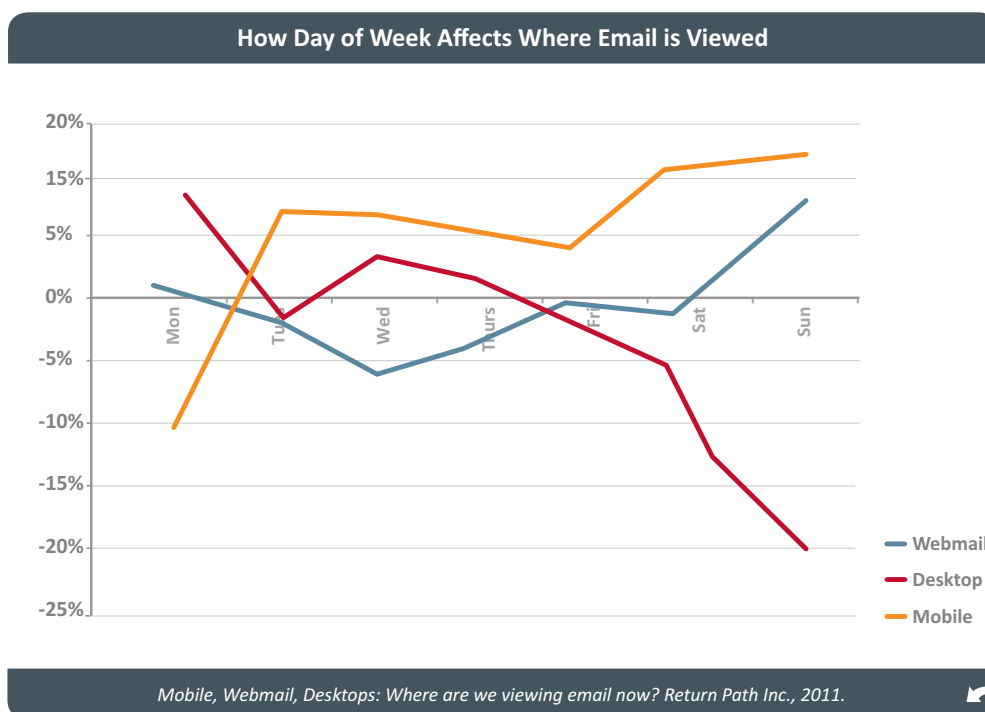
Mobile, Webmail, Desktops: Where are we viewing email now? Return Path Inc., 2011.

Prediction: Email is an important business tool, so some combination of desktop and webmail use is likely to remain dominant well into 2012. But the number of people who opt for smartphones increases each quarter, meaning email viewership on these devices will continue to grow. Add in the iPad and we predict that mobile viewership number will tick up by a measurable amount by the end of 2012.

Recommendation: Benchmarks are great for understanding the shifts in the market, but your company's marketing strategy should be dictated by specific data on your subscribers. Figure out where they are viewing email so you can send them relevant messages. Relevance is about more than just content.

How Day of Week Affects Email Usage

As with our previous version of this report, we again find that where people read their email is affected by when they are reading it. Our research finds a big dip in desktop usage over the weekend, with a corresponding rise in mobile and webmail use. However, we did see a difference in this study in weekend use – whereas we previously saw a pop in webmail use on Sunday and a dip in mobile, this time we found mobile and webmail use to be pretty consistent on both Saturday and Sunday.

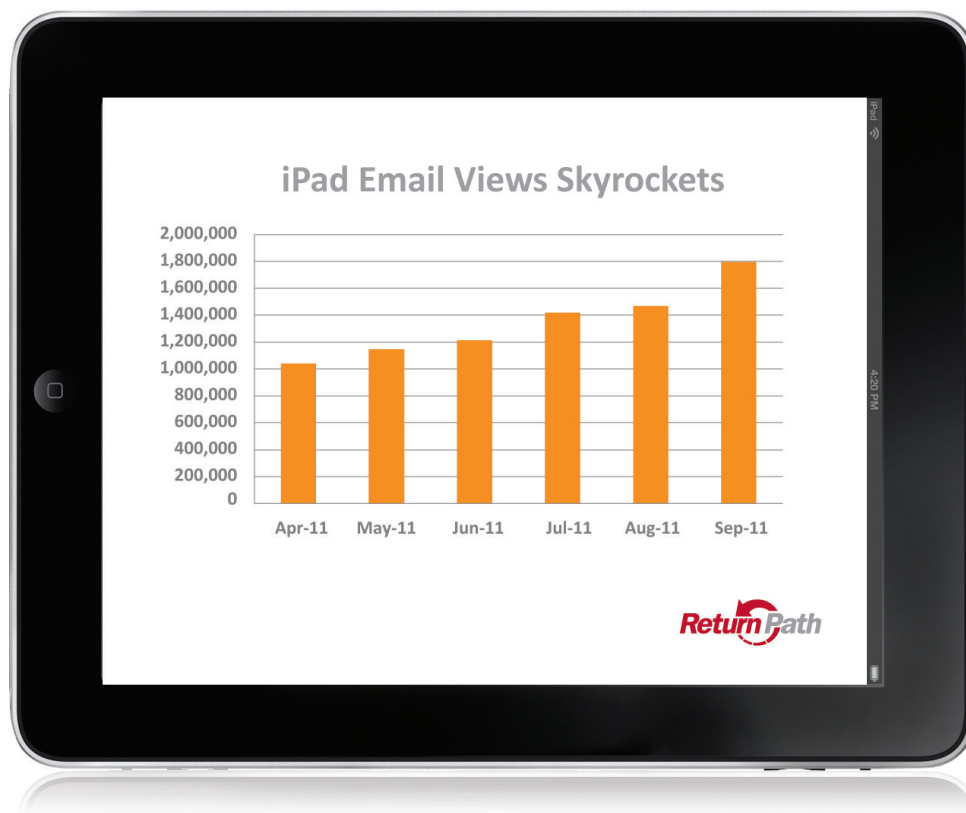


Prediction: This pattern makes a lot of sense based on how people consume email so we don't see this changing too much this year. But the overall growth of mobile could make for a bigger pop on weekends, with slightly less webmail use.

Recommendation: As many automobile industry pundits like to say, "your mileage may vary." A company with a heavy teen audience, for example, might see a pattern very different from this chart. Gather the campaign data specific to your audience, then design your sending strategy accordingly.

iPad Use Skyrockets

In our last study we reported a 15% increase in iPad use relative to iPhone use. The theory was that iPad use might be substituting for smartphone usage (using iPhone as the proxy for smartphones overall). This time, we decided to take a slightly different view and just look at the total number of opens for the 6-month period of this study. What we find is that the use of iPads has exploded – with an increase of 73% in email views on iPad devices between April and September of 2011. Email views on the iPad jumped by 12% between March, when the iPad 2 launched, and April, then continued the steady climb upward.



Prediction: More, more, more. We think this number will just keep going up as iPads continue to proliferate. The email interface is pretty slick and definitely increases the consumption of email on the go.

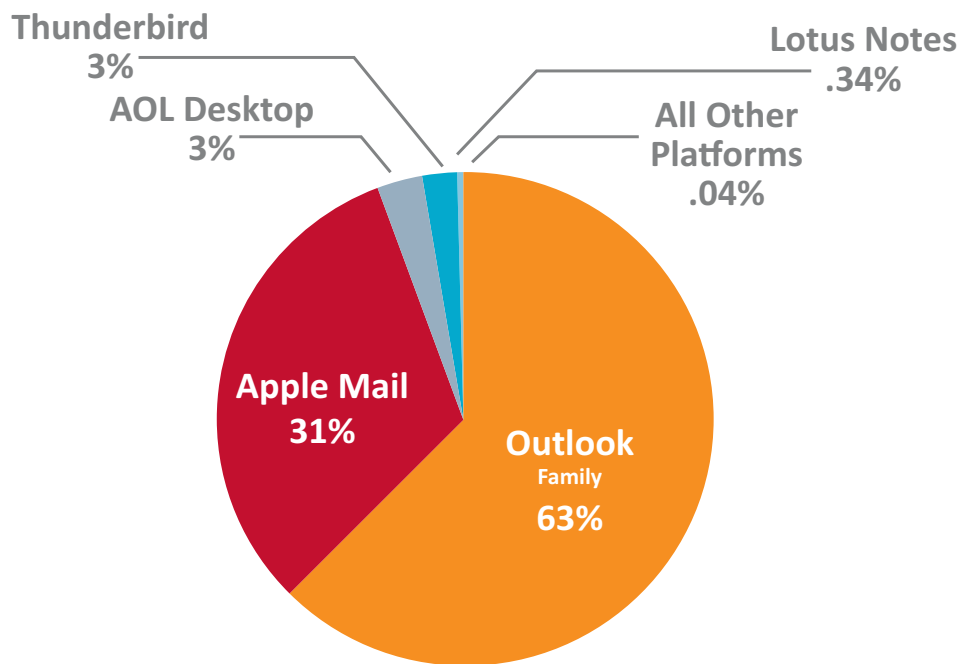
Recommendation: When you consider your mobile design strategy, don't forget about tablets. While they offer a lot more options than the small screen of a smartphone, they are still different enough from a

desktop or webmail environment to require some thought. Testing your designs on all the platforms that matter to your audience is key to success.

Outlook is King of the Desktop

Outlook has remained King of installed software for use on the desktop at 63% of email opens, with no change in the desktop landscape since our last study. Apple Mail remains the only software platform even close to Outlook with about 31% of the viewership. The next closest is Thunderbird and AOL Desktop with about 3% of email views each.

Email Desktop Access: Outlook is King



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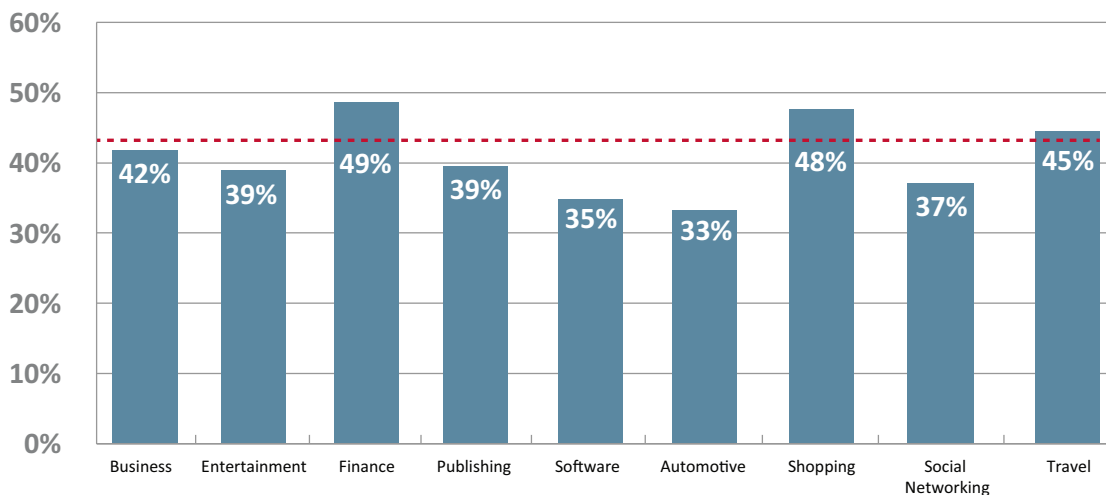
Prediction: This trend is not changing. Outlook will continue to dominate with Apple keeping a share as long as sales of their computers remain at current levels.

Recommendation: Unless you have reason to believe that you have a heavy penetration in an alternate platform (for example, Lotus Notes does still have some penetration in financial services companies) you can pretty much ignore everything except Outlook and Apple Mail. But Outlook, with its many versions and variations, will offer you enough challenges anyway.

Where Email is Read by Industry

For this study, we took a look at the data broken out by a few key vertical segments. The surprise here is that we don't see very much difference in viewership patterns by industry versus the overall average. A few exceptions were finance and shopping, which showed more webmail views; entertainment and social networking which showed slightly higher mobile views; and software and automotive which saw slightly higher desktop views.

Webmail Views by Industry

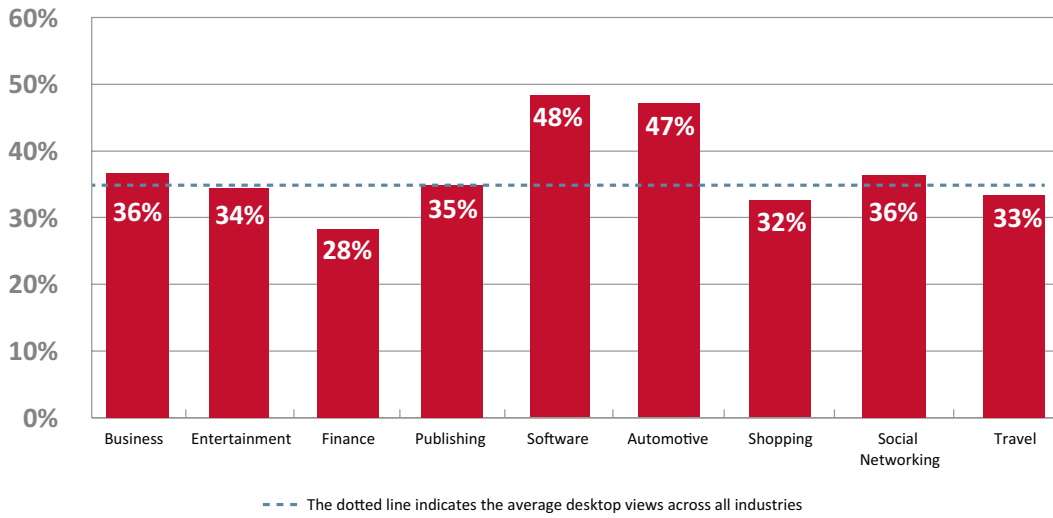


--- The dotted line indicates the average webmail views across all industries

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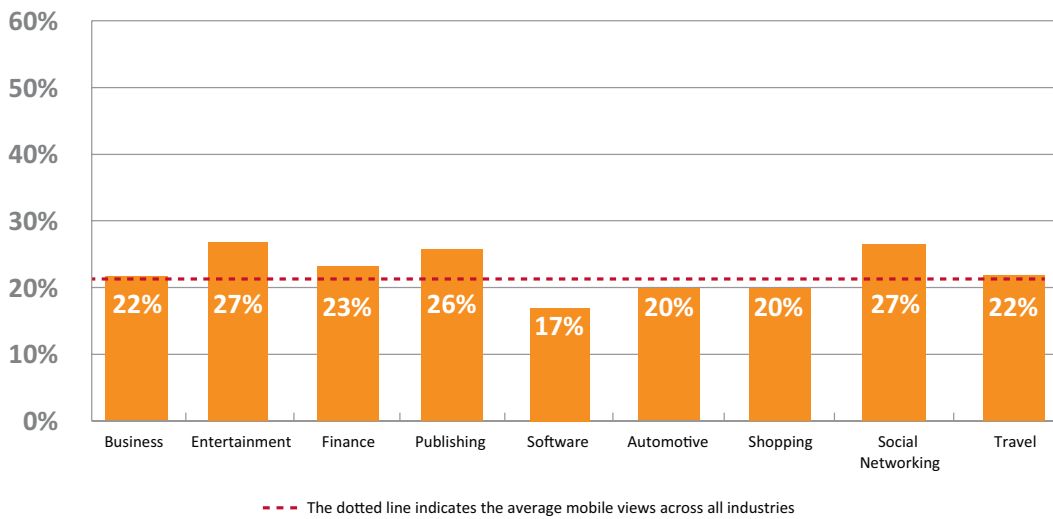


Desktop Views by Industry



Mobile, Webmail, Desktops: Where are we viewing email now? Return Path Inc., 2011.

Mobile Views by Industry



Mobile, Webmail, Desktops: Where are we viewing email now? Return Path Inc., 2011.

The Smart Marketer's Checklist:

- 1. Email is everywhere you want your message to be:** The clear message of this study is that email use is not declining as consumers gain access to more devices that encourage email consumption. People are now relying on getting email in more places and on more devices than ever before.
- 2. The medium is the medium:** You know how anyone born after 1981 looks at you funny when you talk about cable vs. broadcast ("It's just TV!")? Well pretty soon the same will be said for trying to differentiate between mobile and email. Yes, text messages are different, but the proliferation of smartphones means that SMS isn't the only way to message on the go. Today's users are "always on" when it comes to email – and they expect you to be too.
- 3. Data is more valuable than guesses:** Trying to manage your marketing strategy based on hunches is rarely a recipe for success. You need data to make informed decisions – and not just the kind of market share data that you can find in benchmark reports like this one. You need to know where and how your audience accesses your email and other content. Depending on the demographics that you are targeting, your penetration of mobile usage could be dramatically different than what you see in industry reports.
- 4. Don't discount the desk:** As exciting as mobile devices are, plenty of people spend long stretches of their day at an office or in a cubicle, interacting with email through Outlook or on webmail platforms. Don't get so enamored with your on-the-go strategies that you forget the people who are behind-the-desk. It's important to know your audience and how, where and when they interact with your messages.
- 5. Change is the new status quo:** Think about this – when the iPad launched it was ridiculed in the tech press as silly, unnecessary and unlikely to be interesting to consumers. A year later Apple has sold millions of them and they are changing how and where consumers interact with both email and the web. Two years from now we could be talking about yet another new platform or device that hasn't even been imagined yet. Like the Boy Scout motto – Be Prepared – and plan for change.

Methodology

Return Path studied data from its Campaign Insight tool which tracks which platforms and email software programs subscribers use to read email. For this study we examined data from April 2011 through September 2011 from more than 200 different clients using the Campaign Insight tool. In total, the study examined more than 400 million data points. For charts 1-4, we compared data from the 90 clients included in our [first version of this study](#) to those same 90 clients now. For the fifth chart, email views by industry, which is new data for this study, we looked at a subset of the 200 clients who currently use Campaign Insight who fit into the categories reported.

Contact Us

North America

New York
304 Park Avenue South, 7th floor
New York, NY 10010
Phone: 212-905-5500

California
100 Mathilda Place, Suite 100
Sunnyvale, CA 94086
Phone: 408-328-5000

Colorado
8001 Arista Place, Suite 300
Broomfield, CO 80021
Phone: 303-999-3100

Australia

Australia
Level 20, 201 Sussex Street
Sydney NSW 2000, Australia
Phone : +61 2 9959 1956

South America

Brazil
Rua Faria Lima, 1912, Cj. 21 São Paulo,
SP 01451-907
Phone: +55 11 3740 8300

Europe

United Kingdom
12 Melcombe Place
London, NW1 6JJ, UK
Phone: +44 (0) 845 002 0006

France
164 bis, Avenue Charles de Gaulle
92200 Neuilly sur Seine, France
Phone: +33 (0)1 78 15 38 42

Germany
Neuer Wall 80
20354 Hamburg, Germany
Phone: +49 (0)40 822 138-438