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DMA Insight: Consumer email tracking study

2015

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Introduction

The intentions of marketers and the perceptions of consumers don't always match. As email is the backbone for so many digital and one-to-one campaigns, it's crucial to consider what consumers think of it.

Our picture this year shows consumer expectations and habits are anything but static.

Of course consumers are mobile, but their mobile email relationship is complicated. They are increasingly happy to manage and sort emails on their smartphones, but they are still reluctant to buy on a smartphone, leaving that for the desktop or laptop.

We know that those companies that take steps to give consumers what they want and need will succeed. A customer-centric approach continues to go a long way.

Putting the customer first means building your business around consumer preferences. This works on many different levels – for example how you choose to run your business day-to-day, to the creative detail.

One thing we have learned from this research is that to persuade consumers to pick your email from their increasingly busy inboxes, they want interesting subject lines.

It's interesting that despite all the brilliant new tools approaches built around email, like automation and personalisation and by using data creatively, it's the craft in that email that really appeals to consumers.

This is one of the many reasons we began the campaign for great British copywriting, because creativity remains a premium resource. Something as simple as a tantalising subject line can make a significant difference, particularly when decisions to delete or keep emails are made in an instant.

One-to-one skills like copywriting remain an absolute necessity to make your emails stand out from the growing crowd, particularly when married to new technologies. Taken together, this will help marketers narrow that gap between what they plan and what actually happens, and give your customers what they want.

Rachel Aldighieri
DMA
MD

DMA Benchmarking Hub Chair opening statement

Ever since I started working in Email back in 2009, the chill wind of the statement "the death of email marketing" has swirled around the industry like a latent Freddie Krueger: by turns imposing, terrifying and almost impossible to kill.

Yet nearly 7 years later I find myself, as Chair of the DMA's Benchmarking Hub presiding over this year's 2015 Email Tracking Report – the DMA's annual survey of consumer attitudes to email marketing – clear in the knowledge that however cynical or fearful I and my peers may be of the channel's continued dominance, it is still very much at the forefront of consumers' relationship with brands.

Consumers receive many emails a day (around a third saying at least 6), from multiple brands (an average of 10) and armed with portable devices continually check for the latest messages (more than half checking at least every hour). They manage this bamboozling communication stream with multiple email addresses on multiple devices for a significant chunk of their waking hours with 80% of them loving email so much, they're happy to retrieve content from their junk folders on a regular basis.

But if consumers are still addicted to email, the landscape is a fiercely competitive one and there are enough insights here to leave many a marketer with sleepless nights: email may not be dead in the grander scheme of things but it might be for the marketer who falls short of addressing the fickle, time-poor, bargain-savvy, easily distracted and – looking at some of the pointers around the increasingly important subject of Data Protection – cynical consumer.

Consumers continue to sign up to more and more brands to receive more and more emails yet in doing so, appear to be underwhelmed with what they get (over half agreeing or strongly agreeing that most marketing communications aren't of interest to them). Given the journey to fruition in 2016 of the EU's updated Data Protection Legislation, the inevitable collateral of more media-whipped horror stories around consumer data is bound to impact on brands' customers attitudes to their data. It is up to us to make sure consumers not only get the best communications we can send but that we acquire their active consent in doing so.

As a final note, I'd like to thank all those who contributed to the report's publication: *fast*.MAP for data collection; Paul Seabrook of Beautiful Insights for his compiling and insight, Thomas Ridley-Siegert and Emma-Jayne McEwan from the DMA for assisting the volunteers of the Email Council Benchmarking Hub to develop the report and interpret the results and last but not least, Dotmailer's sponsorship: without which these insights would be lost.

Marcus Gearey
Principal Analyst, Zeta Interactive
DMA Email Council

Sponsor's Perspective

With more and more emails reaching the inboxes of consumers every year, reports like this one are invaluable to marketers who want to understand the needs and preferences of their customers and subscribers. I am comforted by the fact that this data backs up what many in the industry have been saying, namely that consumers pay attention to whom they entrust their data when they are giving it over but conversely may not recall having handed it over at the point in the future when they receive your email and last but certainly not least want relevant content.

I am concerned however, that even though we have seen these consumer attitudes over the past few years, we are not seeing a shift in their perception. That tells me that the industry is not doing a good enough job to meet the consumers' ever increasing expectations. The data would indicate that we are running just to stand still.

Following best practices and listening to consumers, highlighted throughout the study, are vital to the success of brands' ongoing marketing activity. But let's remember that this insight is also there to maintain integrity in email marketing as a practice.

As a leading provider of email and marketing automation software dotmailer is pleased to sponsor this research, undertaken by the Direct Marketing Association. We'll leave you to read the full report, and we hope you'll find the content as useful as we did.

Skip Fidura
Client Services Director for dotmailer
Chairman of the DMA Email Council

Executive summary

Mobile and curation: Half of consumers use email 'on-the-go', usually on a smartphone. Smartphone and tablet use cannibalises many email activities previously carried out on a desktop or tablet, although they return to a desktop or laptop to buy. 63% of emails are deleted immediately, 75% within 24 hours, the remainder curated for later, accessible thanks to searchable inboxes should they be needed. 39% said they spend 0-1 hours checking emails on the go every day. Emails have to be mobile-ready to be effective.

Core accounts: Users also curate with additional email addresses. These multiple accounts (5% have 10 or more email addresses) manage marketing, social or other activity. 51% have a core account they have used for at least 10 years. Like a bank account, consumers are reluctant to switch this core email address. These core accounts are therefore of significant value to both consumers and to marketers and represent a higher value for long-term account data.

Brand trimming: On average consumers sign up to 9.8 brands, with clear signs that they are managing the total number to between six and 20 brands, ejecting the extraneous. This could be down to consumers finding brand messaging less interesting or relevant – 51% believe just 1%-30% of emails are relevant or interesting, a number that has risen steadily over the past four years.

Creative engagement: Consumers are most likely to be engaged by interesting subject lines and pictures – these are the top two choices. Subject lines in particular are the most important factor to consider. They are the gateway to email content, which is in turn the gateway to your landing page, your product, etc.

Trust: The main reason a person will rely on a brand to treat their data properly is if they trust that brand (26% of the total). Other significant factors included a clear data protection policy (19%), good brand experience (17%), not recognising the sender (45%), not remembering signing up (37%) and receiving too many emails (37%).

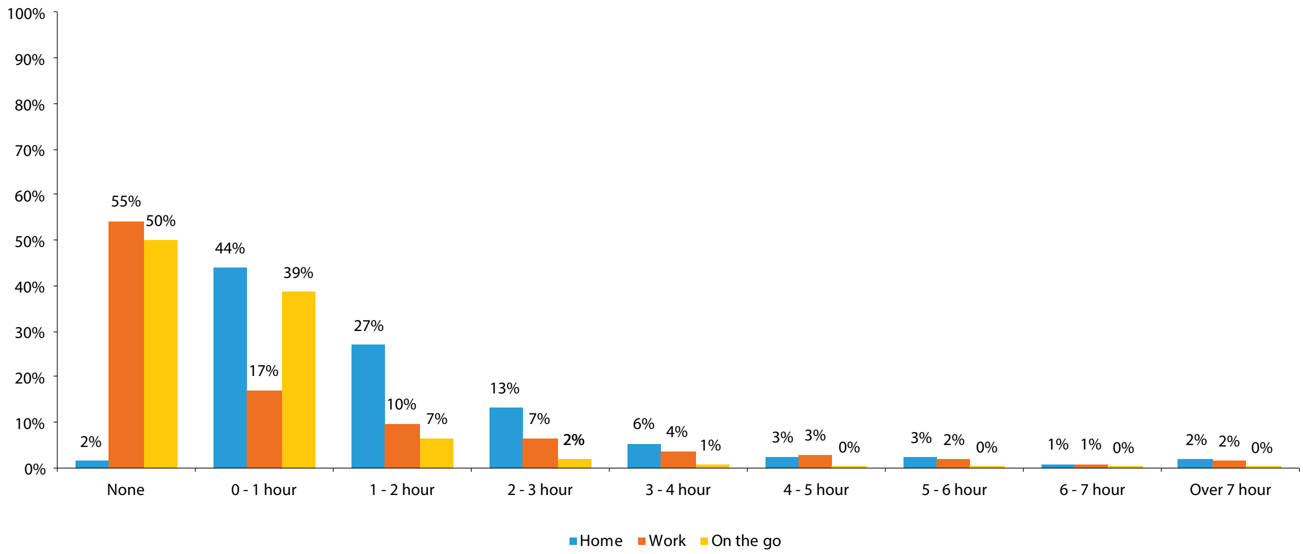
More noise: 63% agreed or strongly agreed with the statement, "Most of the marketing emails I receive include no content or offers that are of interest to me". 83% sometimes, often or always wonder why they receive brand emails. 96% have at some point wondered this. Inboxes are filled with marketing messages of little interest. But, the number of trusted emails arriving in inboxes is also on the rise, with 17% receiving more than 70 trusted emails per week. Personalising emails would clearly improve relevance.

1. Email users in 2015

Email is the oldest mass digital communication medium we have, first developed as a means for academics to exchange information in the 1960s. It emerged as a mass medium from around 1993, gaining traction in 1996 following the launch of Hotmail, the first major web-based service.

1.1 Checking in

Email's success is undeniable. It's almost impossible to imagine a person can operate without an email address. Radicati[1] estimate that there were some 2.5 billion email users active in 2014. To put into context, that is around two and a half times Facebook's global reach. Of the total number of digitally-connected people, 85% use email according to Ipsos[2].



Email's latest incarnation is mobile. Half of consumers use email 'on the go', meaning using mobile devices – primarily the smartphone.

Checking email on-the-go shows high uptake, with half of users checking email in this way, but usually dipping in and out rapidly throughout the day. Overall, the bulk of consumers use email for less than one hour per day.

Because personal email addresses represent the person to a degree, or because people fear missing out (FOMO), people feel the need to check their emails often. 6% check their email at least every five minutes, a further 12% checking every 15 minutes, and 28% around every hour. The largest proportion (40%) check their email 2-3 times every day.

Research by Tecmark[3] in 2014 suggested that British smartphone users would check their 'phone up to 220 times per day. According to UK telecoms regulator Ofcom[4], email is the most popular activity carried out on a smartphone, for 81% of smartphone users. Checking smartphones seems to an almost automatic phenomenon, and the cumulative totals for email usage on-the-go may be higher than these consumer estimates.

A majority of consumers who use email use it at home, few said they didn't. Those using email for up to one hour has increased from 33% to 44% since last year. This could be as a result of a real increase in email consumption or it could be that consumers are more conscious of their consumption. There is also the possibility, however, that consumers interact with more communications but do not differentiate email from other forms of messaging they consume on their smartphones such as social media or messaging.

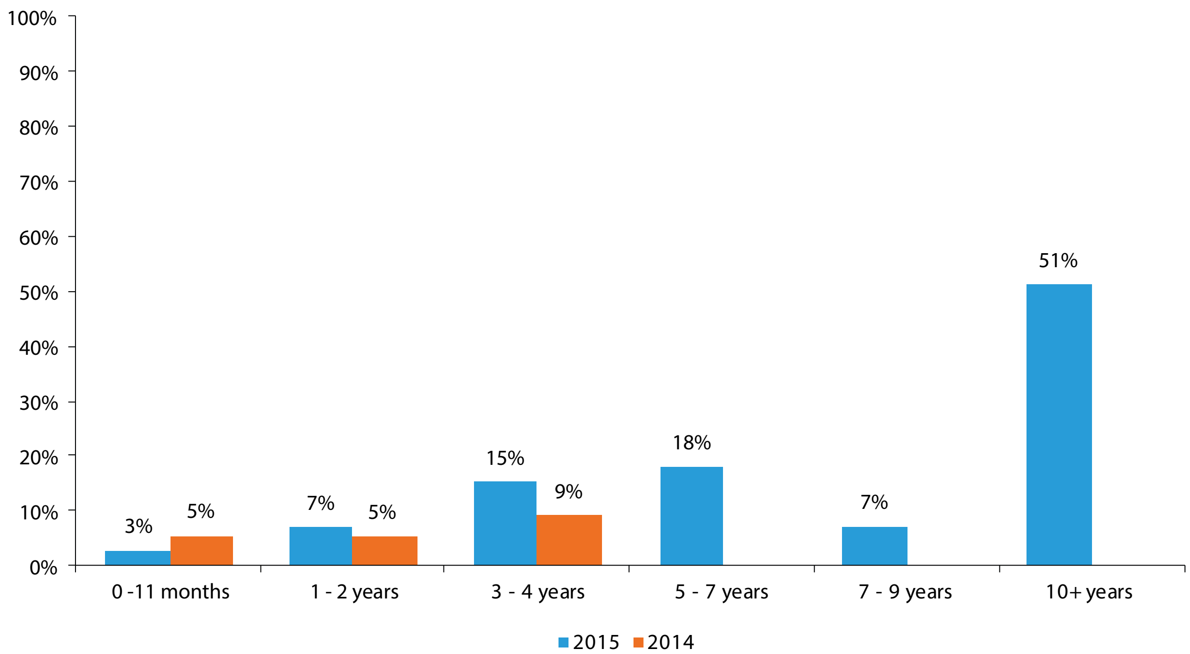
1. Radicati Email Statistics Report
2. Ipsos Press Release
3. Tecmark Smartphone Usage Report 2014
4. Ofcom Communications Market Report 2015

At work, just over half of consumers (54.5%) said they did not use email at all, with this proportion dropping steadily since 2011.

Consumers are not only drifting to smaller windows, but there are smaller windows of opportunity for brands to reach them. Each consumer subscribes to an average of 9.8 brands, in addition to personal and other emails, so messages can be lost amongst the growing noise.

Two in five (39%) of consumers have two email addresses, an increase of 8% compared to 2014. This year there seems to be a small but significant number (5%) that have 'ten or more' email addresses. This could reflect the fragmenting media available – perhaps specific email addresses for specific media.

This research backs-up much of Return Path's Frequency Matters[5] research where they identified three main types of email account. Primary , which are active and actively curated. Secondary accounts, there to receive marketing messages and are less actively used. Finally, 'dead' accounts with next to no engagement.



Note. New answer options were provided in 2015.

Just as people are generally reluctant to transfer bank accounts, people seem to be reluctant to transfer their email addresses.

While we have added more fields here compared to previous years, 51% have had the same email account for more than 10 years, with the majority of the remainder using an address for at least three years. Only 10% have had an email address for less than two years.

A minority (3%) keep an email account active for less than a year, down from 5% last year.
People use at least one core email address as an identifier – it represents them and they are reluctant to let it go. This has consequences for marketers. If a consumer allows you to mail to their core email address, you are trusted. The core email address is therefore valuable to both consumers and brands. Marketers permitted in have the ear of the consumer.

The data clearly shows that there is a higher threshold of trust, interest or both for a brand to achieve this, however. Or put another way, why would a consumer add a brand it doesn't trust or doesn't have an interest in to its core email account?

5. Return Path's Frequency Matters Report

1.2 Brand identity

How can brands convince consumers that they are responsible and able to look after their data?

The leading response is trust in the brand, for a quarter of those surveyed (26%), the same proportion as last year.

Other factors that can convince consumers include:

- Trust: asking consumers who they can share their data with was chosen by 20%, up from 19% in 2014
- Trust: clear and concise data protection policy at 19%, dropping from 25% last year
- Good brand experience: previous experience of good customer service at 17%, 18% in 2014
- Good brand experience: easy to use website with obvious security features was 17%, up from 15% in 2014
- Trust: giving consumer the option of how they can communicate with brands was 16%, down from 19% in 2014

All these factors can be seen as indicators of a responsible brand – representing trust and putting customers at the centre of your marketing, which are factors in line with the DMA Code. Although not a scientific breakdown of factors that customers want, this indicates that trust is the overriding concern for customers.

2. Email marketing (from a consumers' point of view)

There has always been a disconnect between the marketing a brand develops, and how consumer perceives that marketing. How good a brand's marketing is depends on how narrowly that gap can be closed.

The research has identified some relevant factors to marketing messages – what's 'trusted', what's 'relevant', and what's 'interesting' to a consumer.

It might seem obvious that for an email to have impact it should tick all three boxes – from a trusted brand, so they have confidence in it; interesting so they open the mail in the first place; and then relevant to that person so they find some value and click.

Without these three factors, emails are likely to be binned.

2.1 How do consumers think about brands?

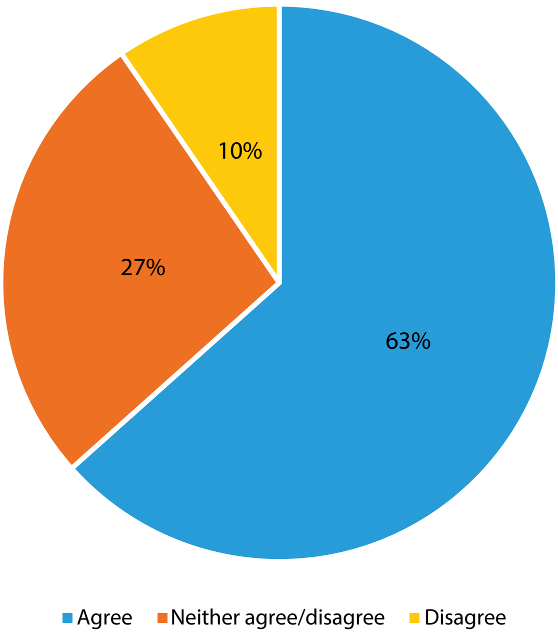
The good news for marketers is that the number of trusted marketing emails arriving in consumer inboxes is increasing. The groundwork has been done.

One-fifth (20%) receive 1-10 emails per week, the lowest number recorded since 2011, but one-third (34%) have more than 40 emails per week, with half of those - 17% receiving more than 70 emails per week.

1% said they receive no emails from trusted brands. However, it's not clear whether this means they receive marketing emails, but they don't trust the brands, or whether they don't receive the emails at all.

Nevertheless, brands face a problem – consumers face increasing clutter, and so brands must fight harder to be seen, and to find that click.

2.2 More noise



While the volume of mail is increasing, so is the noise.

When asked whether they agree with the statement, "Most of the marketing emails I receive include no content or offers that are of interest to me" – 63% agree or strongly agree.

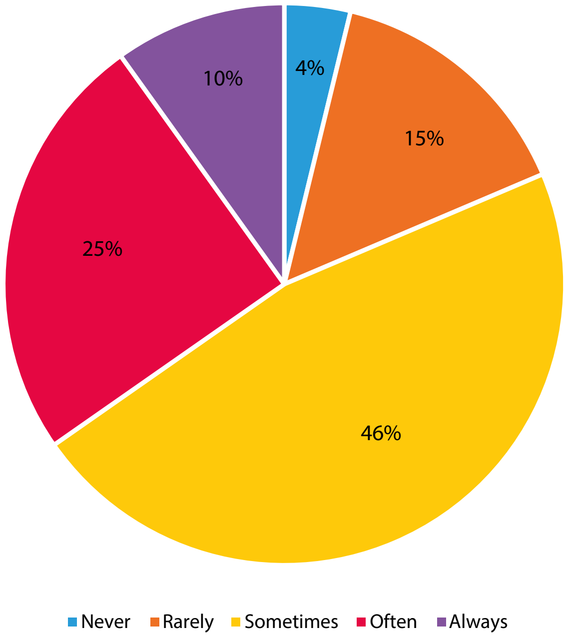
Consumers therefore consider the quality of emails to be generally poor, despite the high number of emails from trusted brands, and could explain why a similar proportion of emails (62%) are immediately deleted by the user.

Only 10% disagreed (9% 'disagree' and 1% 'strongly disagree') with the statement.

While emails may come from trusted brands, those mails do not generally contain interesting or relevant brand messages, this could be overcome by ensuring consumers receive relevant information.

The technology to make messages personalised already exists but brands are not adopting this technology, perhaps due to the perception that such systems could be relatively expensive or time consuming to set up. Clearly many brands resort to old fashioned 'batch and blast' strategies. Smarter strategies could turn this situation around.

2.3 Weak brand affinity



Consumers are often perplexed by why they receive brand emails in the first place.

Almost half of consumers (47%) sometimes wonder, "how brands got my email address", with a third (35%) often or always wondering this. This represents 83% of the total, with a minority (17%) rarely or never wondering.

At some point, 96% of consumers have wondered how a brand got hold of their email address. This is not a good message for the industry.

Brands are not using welcome programmes in their marketing to introduce themselves to their customers, which would be useful in building string relationships with consumers.

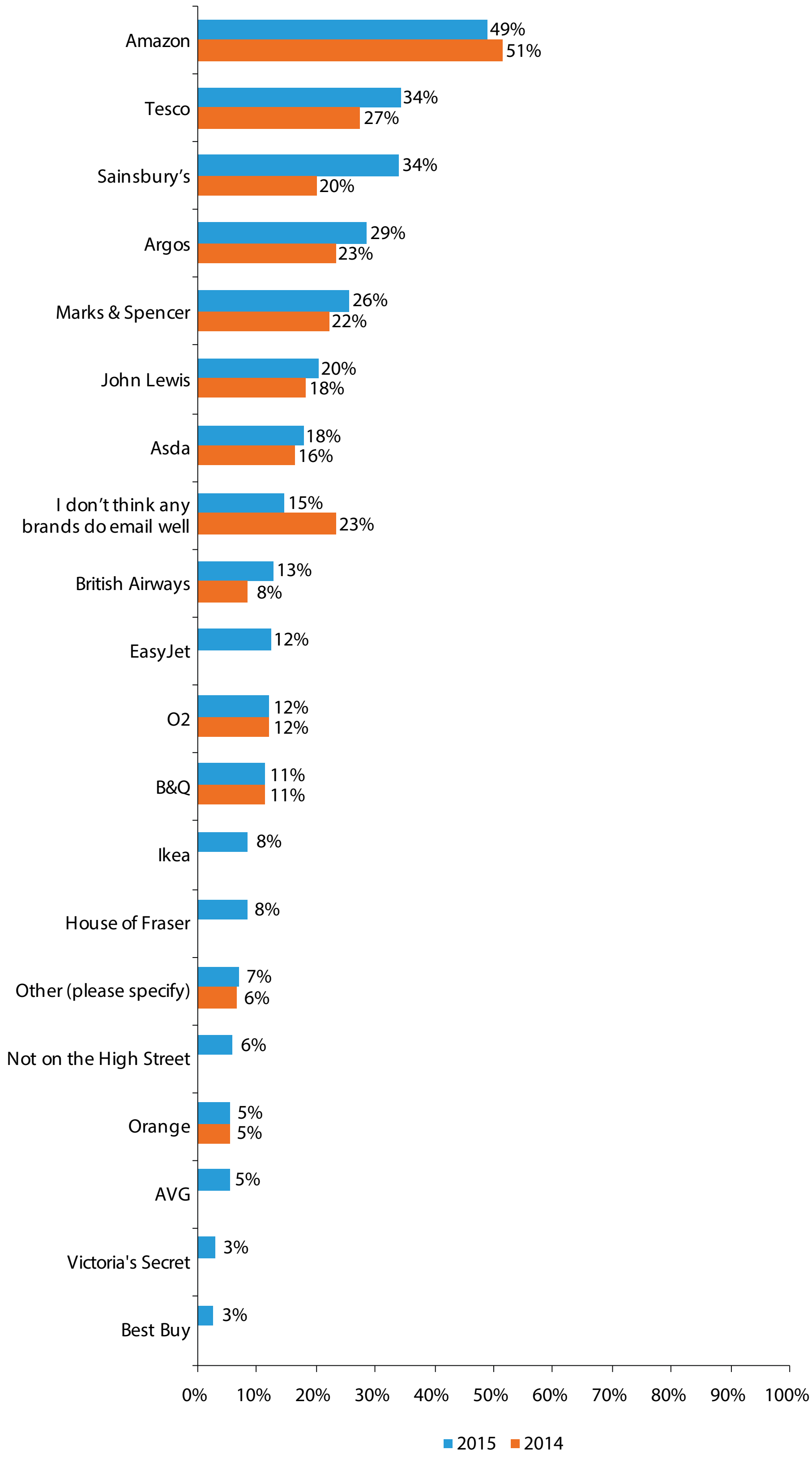
In addition, consumers will not know the difference between 'service communication' messages (such as product recalls), which may be sent wider than marketing messages, or messages to inform the consumers about the progress of a transaction. All arrive in inboxes and may be irrelevant, but consumers are unlikely to see the distinction and are likely to notice the volume and noise of messages instead.

If consumers are unsure how or why a brand holds their details and sends them emails, this could of course indicate mass-amnesia. Alternatively, it indicates a weak association with the brand at best, particularly as consumers are frequently asked for email addresses, and are often relatively happy to distribute them, but they may not have a clear recollection of this later. At worst it could indicate poor or underhand data collection.

Are brands failing to make it clear to consumers how and why they have signed up? Or, are there increasing amounts of spam email that are genuinely surprising?

If consumers do not remember signing up to receive brand messages, their affinity to a brand may be weak, and they may be on the way to unsubscribing. It's up to brands to minimise the chances of this happening in their messaging.

It may help to ensure that branding is clear and consistent, and that email addresses match the brand name to minimise any possible confusion. Messaging could also illustrate their relationship in their marketing, for example with welcome programmes or anniversary emails.



Note. New answer options were provided in 2015.

Consumers give plaudits to a selection of well-known brands, with many of the major retailers winning a positive response to their email activity compared to last year.

Perhaps more importantly, those that think no brands do email well has dropped significantly since last year, down from 23% to 15%.

3. Email curation

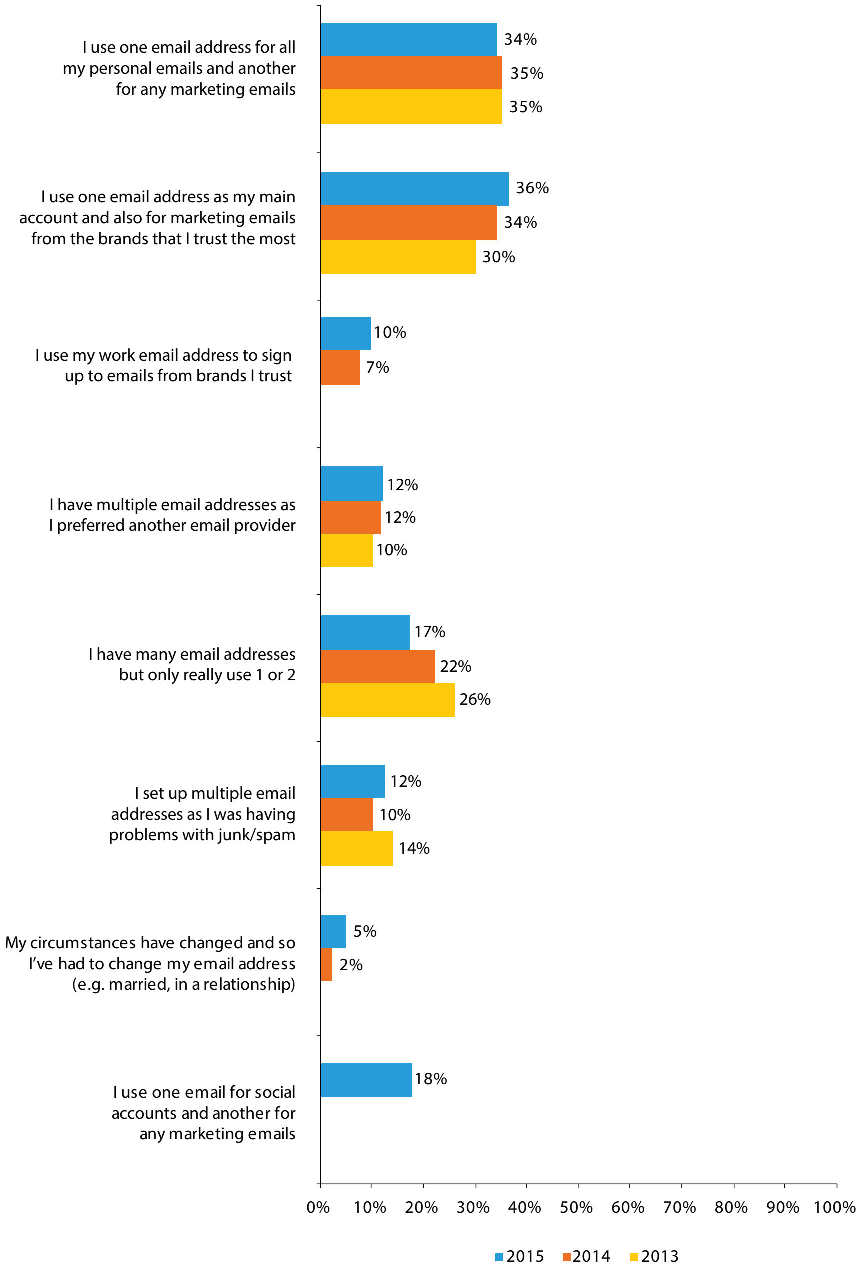
Consumers don't just use their inboxes to receive messages. Consumers actively curate their inboxes, deleting those messages they have no interest in and keeping the remainder because the information is useful or because it could be useful.

3.1 Multiple accounts

Consumers also use multiple accounts (as we have seen already, 5% have more than 10 email addresses) for different functions.

The reason is simple – consumers understand that signing up their email address means more emails, so multiple accounts can help manage this. These tactics help consumers exert their power and control over messaging.

Giving control to consumers to select their messaging preferences and segmenting and personalising emails could do much to reduce irrelevant emails.



Note. New answer options were provided in 2015.

One-third of consumers (34%) use one central email account but with a secondary account they designate for marketing emails, the same proportion as last year.

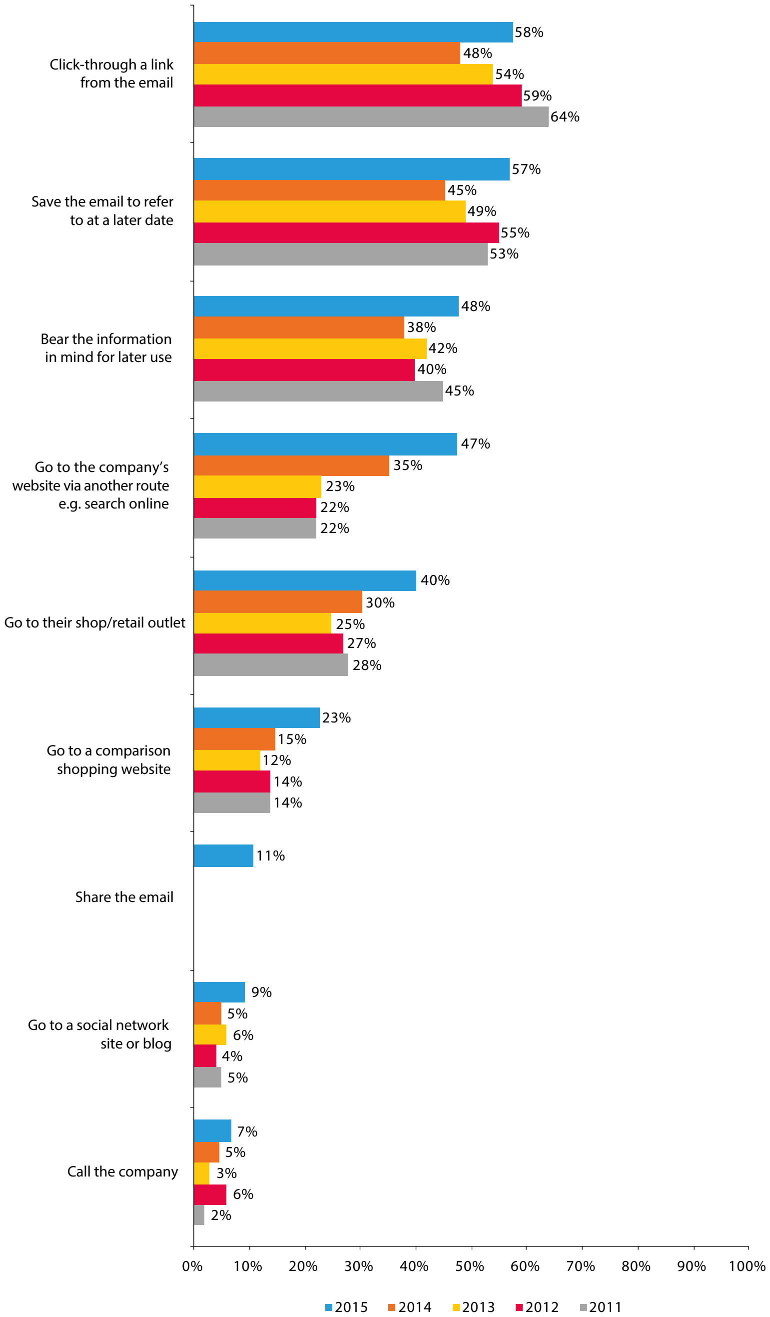
Slightly more people (36%) use a single email address to lump together their personal emails and emails from brands they trust, indicating that either these consumers value those brand messages or don't have the patience to maintain a second account.

This year a large minority (18%) use a single account to manage their social activity and yet another for marketing emails.

This year a large minority (18%) use a single account to manage their social activity and yet another for marketing emails.
As several responses indicate multiple accounts, using specific accounts for social activity may be more widespread.

3.2 Actions

While consumers report that the proportion of uninteresting or irrelevant emails is increasing, people are nevertheless predisposed to click or take another action if they receive an email that appeals to them.



Note. New answer options were provided in 2015.

However they receive emails, whether in a core account or in another account, the good news is that for those who receive an interesting email, consumers are more likely to respond positively compared to last year. All behaviours measured increased.

3.3 Actions and reactions

The three most popular choices relate to managing the email directly – the most popular reaction to an interesting email was to click through, chosen by 58%, up from 48% last year. Close behind was saving the email at 57%, up from 45% last year, and then bearing the information in mind for later on 48%, up from 38% last year.

A good email will most likely prompt a click, followed by two activities that will curate the information for later.

The next three most popular reactions to an email provoke actions using another channel, whether online or offline. 47% would go to the company's website via another route, up from 35% last year. 40% would go to the shop, up from 30% last year and 23% would go to a price comparison website, up from 15% last year.

Marketers should consider two consequences:

Firstly, if an email prompts an action, then multichannel messaging has to be right or the activity is wasted. If consumers choose another route to your website, you need to make it easy for them. Email has to work as part of a multichannel experience, including search and SEO so that the email achieves the desired effect if the consumer doesn't opt for the click, which backs-up Google's Zero Moment of Truth research.

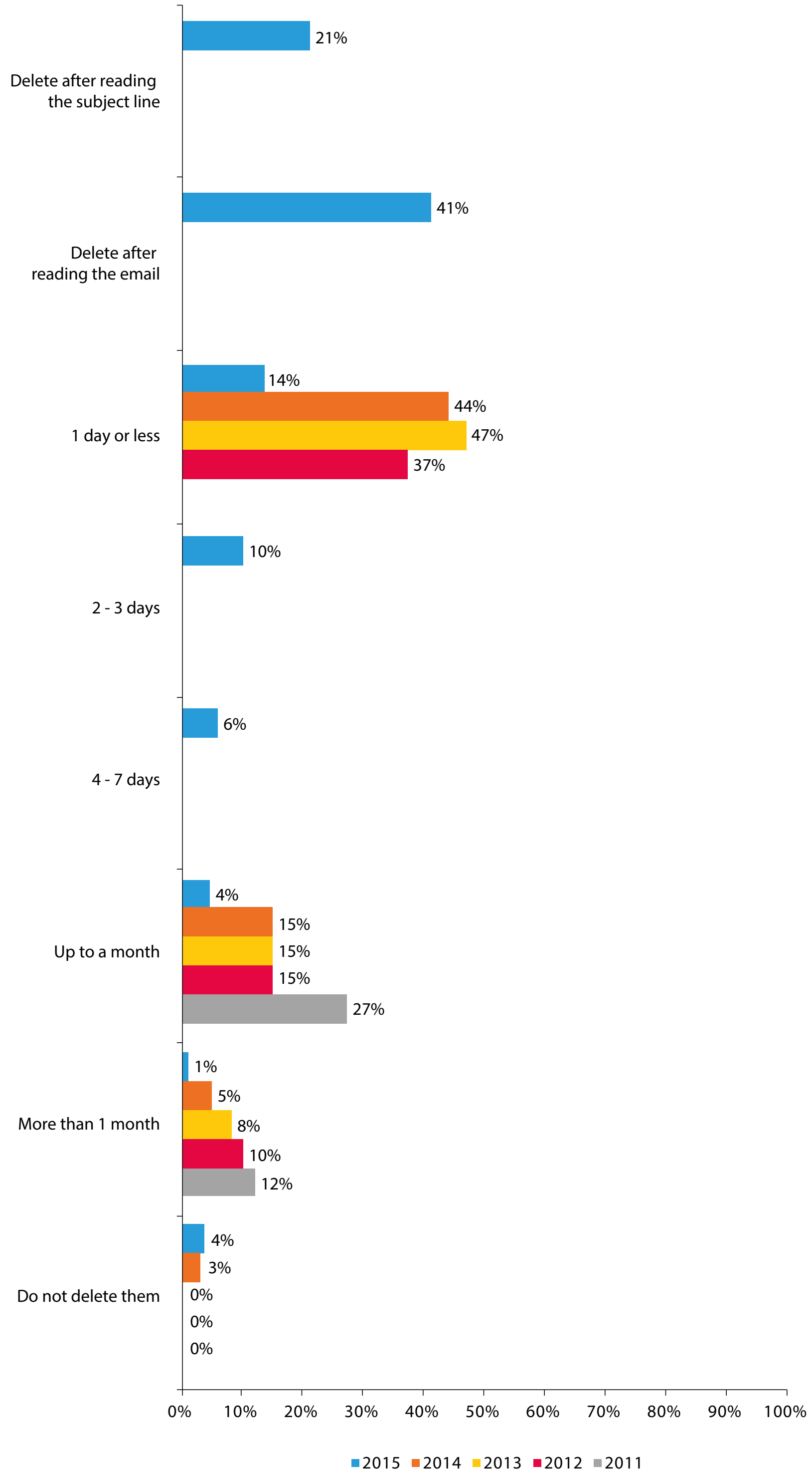
This applies equally offline. If the consumer decides to go to the shop then this should be signposted clearly in-store or in point-of-sale material.

Secondly, if the consumer decides to not take the click, then attribution will be problematic. Knowing the consumer journey is extremely important, and using consumer data to map this journey and the place email takes in it will win significant benefits.

In addition, if significant numbers of people choose to bypass the email click, then what proportion of clicks that currently go to search should be correctly attributed to email? Knowing these answers may actually increase email ROI, or mean that budget should be diverted from search to email.

Other actions on receiving an interesting email include going to a social network site or blog for 9%, up from 5% last year, and calling the company was at 7%, up from 5% last year. This shows that, at least for the consumer, brands are multichannel. How well brands cater for this need is up to them.

3.4 Deleting



Note. New answer options were provided in 2015.

When asked how long they keep emails on average, 62% of consumers will delete an email immediately, either after reading the subject line, not even opening it (21%), or after reading it (42%).

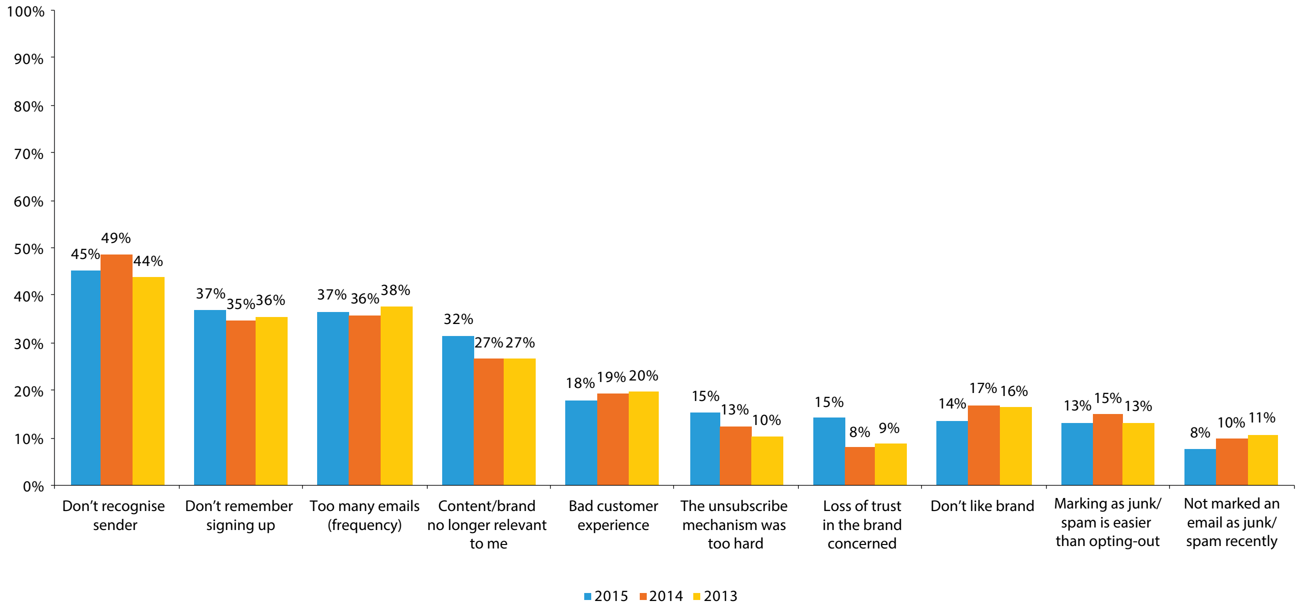
10% delete emails after 2-3 days, 6% delete after 4-7 days. Just 4% keep emails up to one month, falling to 1% keeping them more than 1 month. 4% do not delete their emails.

75% of emails are deleted within a day of delivery, up from 44% last year. Consumers are increasingly intolerant of irrelevant emails.

There may be an argument that even the act of deleting an email will have an effect on the consumer, but it's more likely that once an email is out of sight, it is also out of mind. Rapid deletion could also demonstrate that the consumers is not interested.

That three-quarters of emails are deleted so rapidly is a savage commentary on the overall relevance of emails sent, and that emails need to be sent with the right message and at the right time for better impact.

As we have seen, subject lines are the critical gateway to consumers. Making email subject lines novel or interesting (or even just an accurate reflection of the content of the email) would reduce the number of emails immediately deleted, and supports the idea that skilled copywriters would add a great deal of value to email marketing programmes.



If consumers are sick of email messaging, there are three clear options – either to mark senders as 'spam', block them, or unsubscribe.

Reasons for blocking a sender or marking an email as spam or junk have remained largely static over the past three years. Leading reasons for doing so remain an unrecognised sender (45%), followed by no recollection of signing up (37%) and too many emails (also 37%).

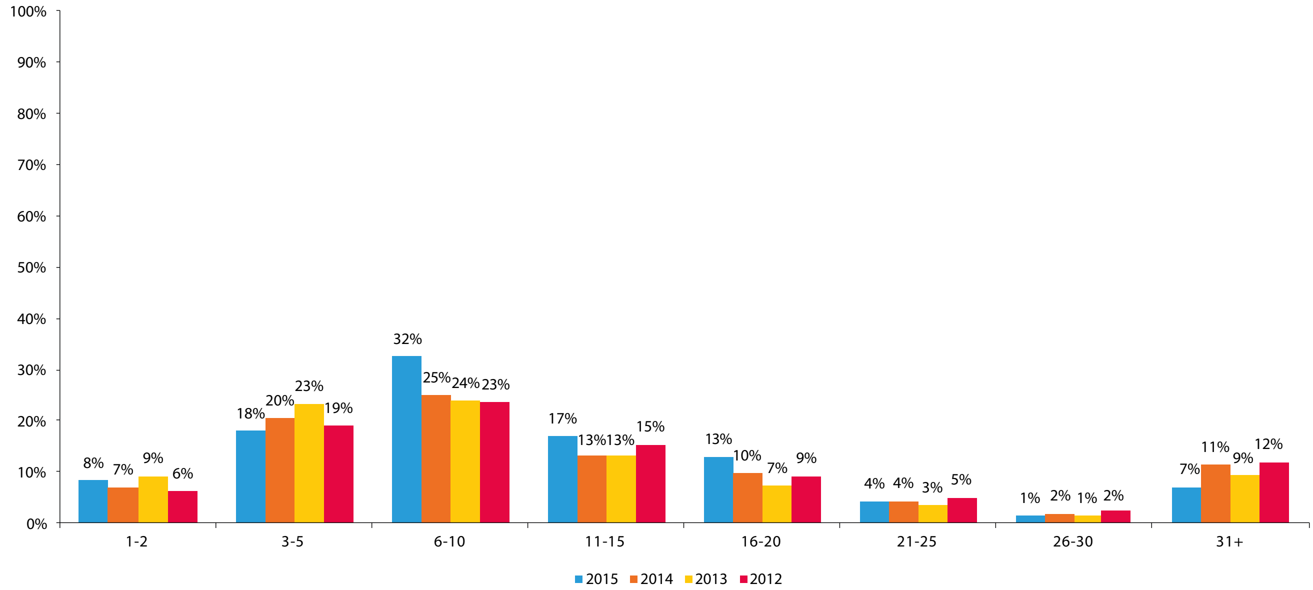
This year, consumers marking email content as junk/spam because they are concerned that the content or brand is no longer relevant has increased from 27% to 32%. Marking messages as 'spam' or blocking may be simpler than unsubscribing or even managing preferences. The feeling that the unsubscribe mechanism was too difficult has increased steadily over the past three years, picked by 15%. The same proportion said they had lost trust in the brand.

Those who have not marked an email as junk/spam recently was 8% (down from 10% last year and 11% in 2013).

From these statistics we learn that familiarity, trust, and volume are key considerations for consumers.
If messages are sent to spam folders, improvements in spam filters mean that close to one in five (17%) now never check them. Some email clients send messages to the spam folder automatically, cutting senders out through inactivity. Many consumers will never know.

If they do check their spam it's usually to remove emails, for more than half (51%) of consumers. 41% check to see if personal emails have slipped into the spam account.

3.5 Brand trimming



Consumers have trimmed the number of brands they follow to a manageable number.

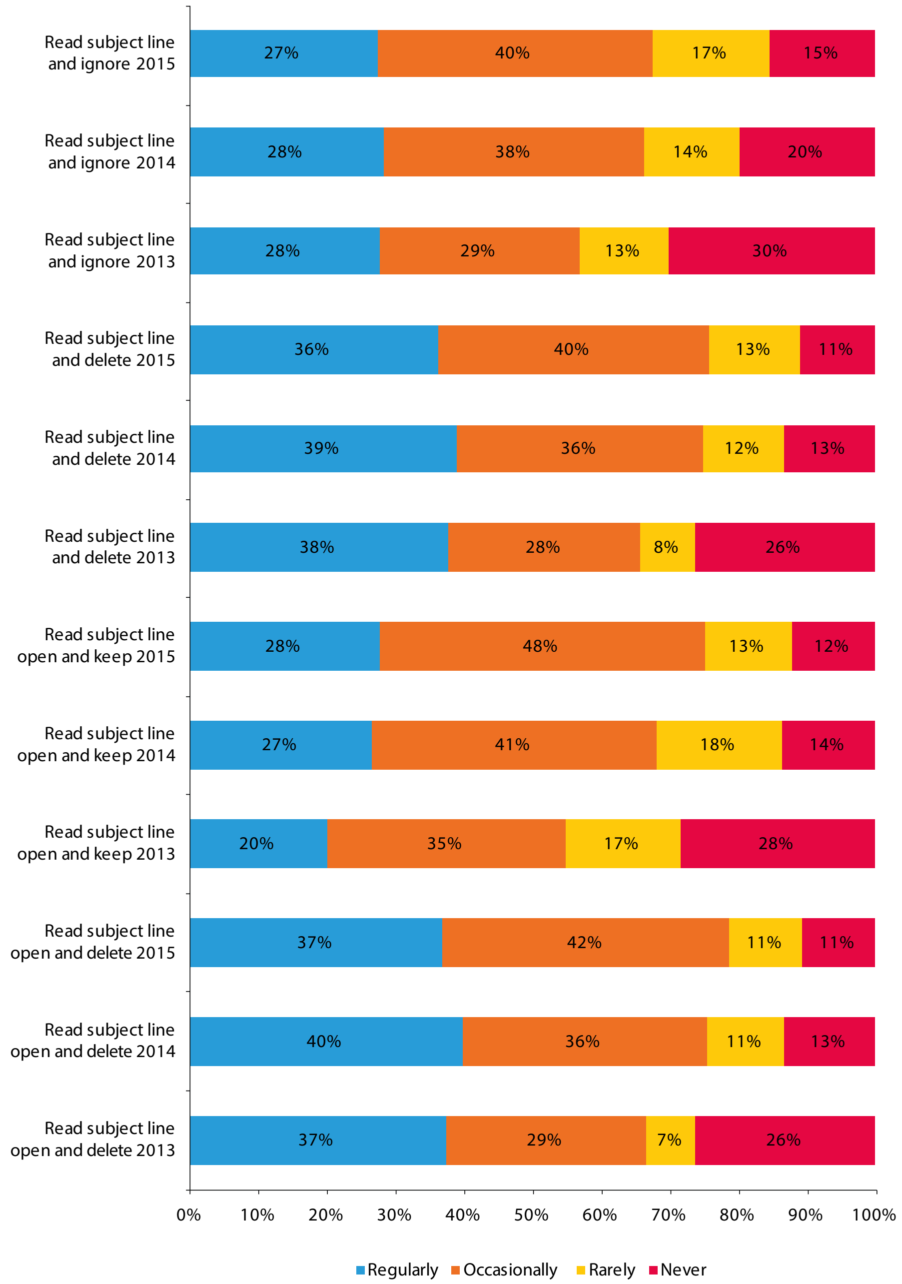
On average people have signed up to 9.8 brands, with almost two-thirds of people (61.6%) clustering around 6-20 brands, up from 46.9% in 2014 and 43.9% in 2013. The largest rise came for those who receive messages from 6-10 brands, up from 25% last year to 32% this year.

Few people sign up to a very small number of brands, just 8% said they signed up to one or two brands. This shows brand messages are normal and accepted by the majority.

Likewise fewer people sign up to a very large number of brands. 6.9% signed up to more than 31 brands, down from 11% in 2014 and 2013, and 12% in 2012.

If consumers have lost patience with brands that offer them nothing, they will get rid of them. They are actively trimming the number of brands with access to their inbox.

3.6 Mobile curation



Consumer behaviour in inboxes on mobile devices tends towards curation.

Three quarters (75.8%) go no further than reading the subject line and deleting 'occasionally' or 'regularly'. This rises to 78.8% for those who read the subject line, open and then delete.

For those who choose to read the subject line and ignore, 67.4% said they did this 'occasionally' or 'regularly'. 75.2% read the subject line, open and keep.

This clearly shows that users quickly consider what to do with emails. We know this decision is made quickly as the majority of emails are deleted within a day of receiving them.

These snap decisions send the majority of emails to the bin. Mobile users eliminate what they don't need and keep the rest as an active choice because the information could be useful.

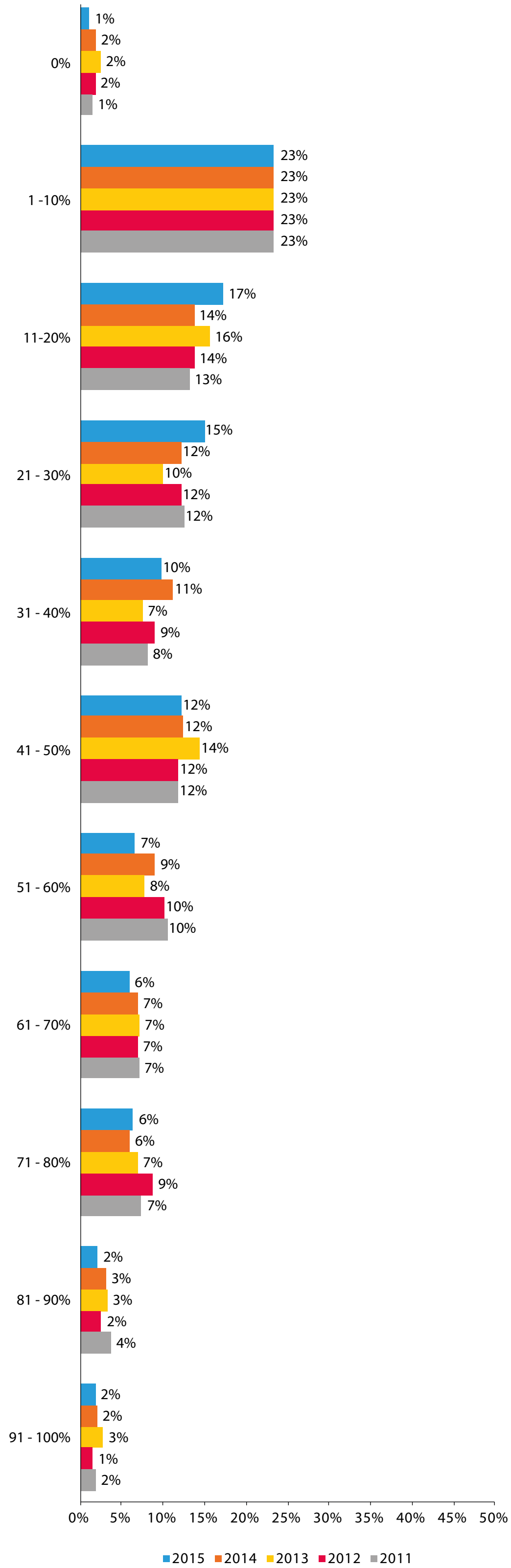
Subject lines have a clear influence on this behaviour and should be a focus for brands, and as described above, copywriters will be able to improve the performance of emails when consumers make these snap considerations.

4. How to attract customers via email

We have seen what puts consumers off, which is irrelevance. We also know how they behave, by curating their inbox. So what do they want from brands?

4.1 Be interesting

It should come as no surprise that consumers want relevant, interesting emails from brands they trust.



Brands should note that the proportion of interesting or relevant emails is moving the wrong way, increasing rather than decreasing, possibly due to the slow uptake of personalisation and segmentation.

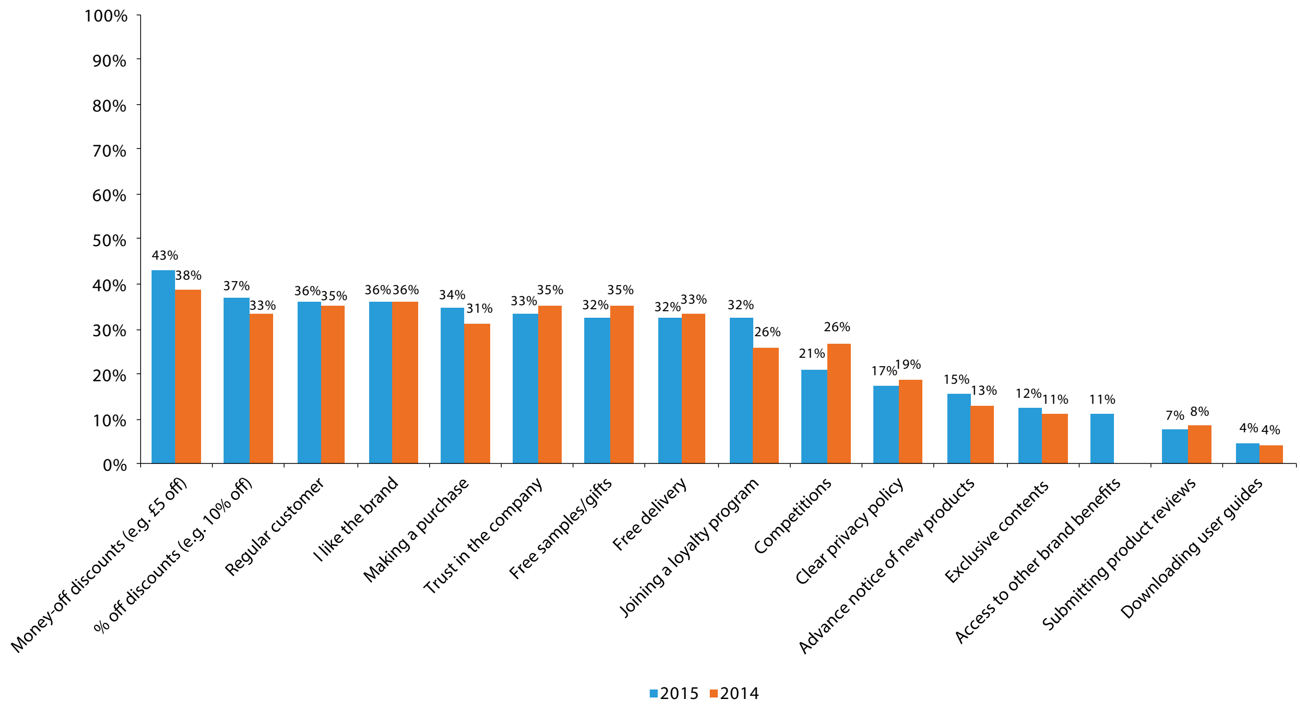
Those who say a low proportion (1%-30%) of their emails are relevant or interesting is increasing, to 51.4% this year, up from 48.1% in 2014 and 48.8% in 2013.

On the other hand, those who say a high proportion of their emails, 50% or more, are relevant/interesting is decreasing and from a low base, down to 22.3% this year, from 26.2% in 2014 and 27.1% in 2013.

The proportion who say that more than half of brand messages are 'interesting' or 'relevant' has dropped consistently, from 30% in 2011 to 22% in 2015.

This is perhaps not surprising, when 63% agree or strongly agree with the statement that, "Most of the marketing emails I receive include no content or offers that are of interest to me."

4.2 Offer real benefits



So what do consumers want from brands?

Factors that will make a consumers sign up to a brand's emails focus on real benefits.

Discounts are most popular, both vouchers for money off (43%, up from 38% last year) and a % discount increasing in popularity to 37% from 33% last year.

However, as we know that consumers find most emails to be irrelevant, it's not enough to provide offers, but the right offers to the right people. Again, segmentation and personalisation should help here.

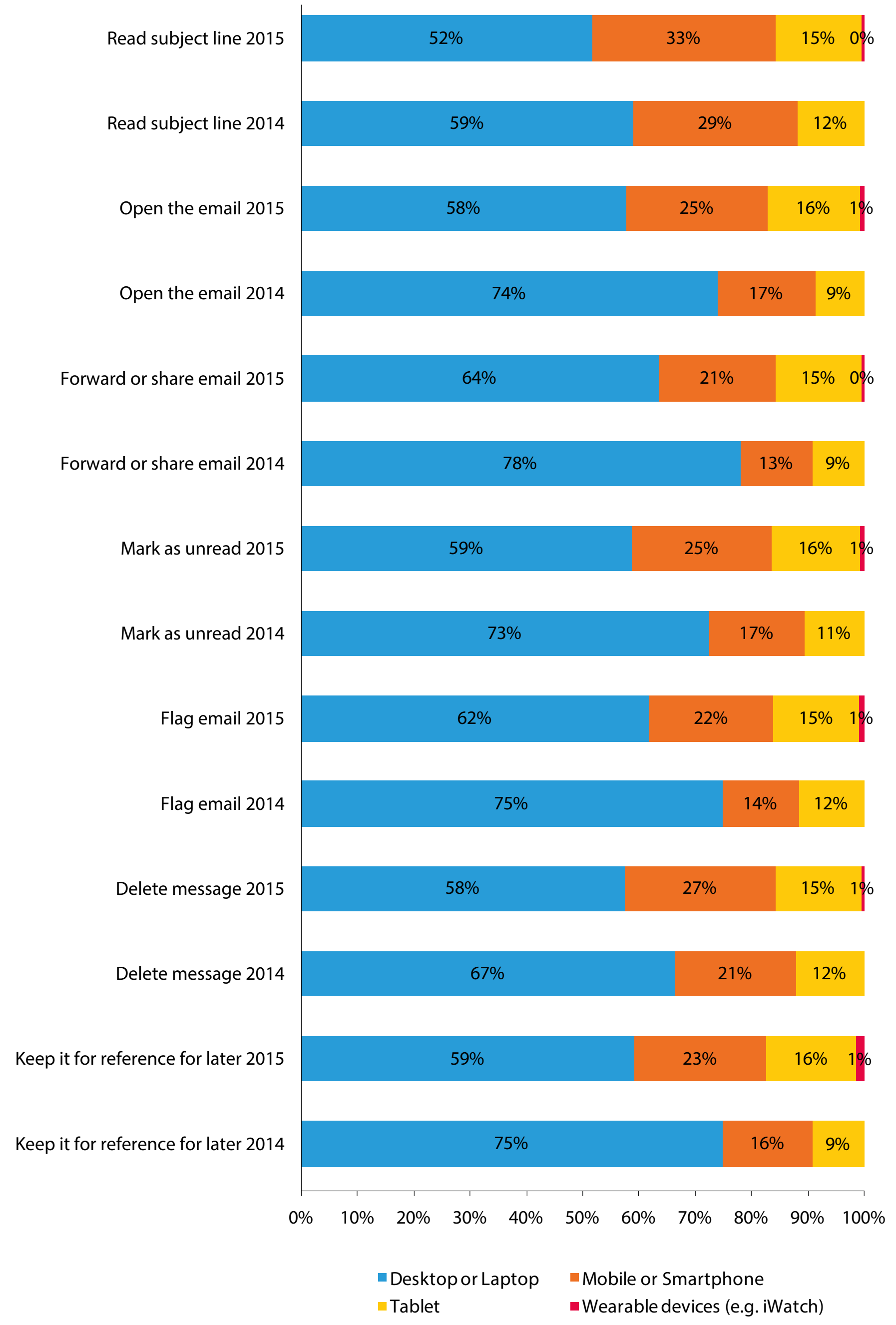
Secondary factors were about the brand itself, such as affinity for the brand at 36%, the same as last year, and being a regular customer (a good indication that the person at least trusts the brand) at 36%, up from 35% last year.

Purchase (up to 34% from 31% last year), and factors around purchase such as free delivery (32% down from 33% last year), and loyalty programmes (32%, up from 26% last year) were also significant.

Free samples/gifts were down from 35% last year to 32% this year.

Less important were competitions, which decreased in importance from 26% to 21% this year. Factors like a clear privacy policy (19%, down from 17% last year) and exclusive content, found to be unimportant in our recent Customer Acquisition Barometer research, was less important here at 12%, up slightly from 11% last year. Advance notice of new products (15%) was another less important factor.

4.3 Be mobile-ready

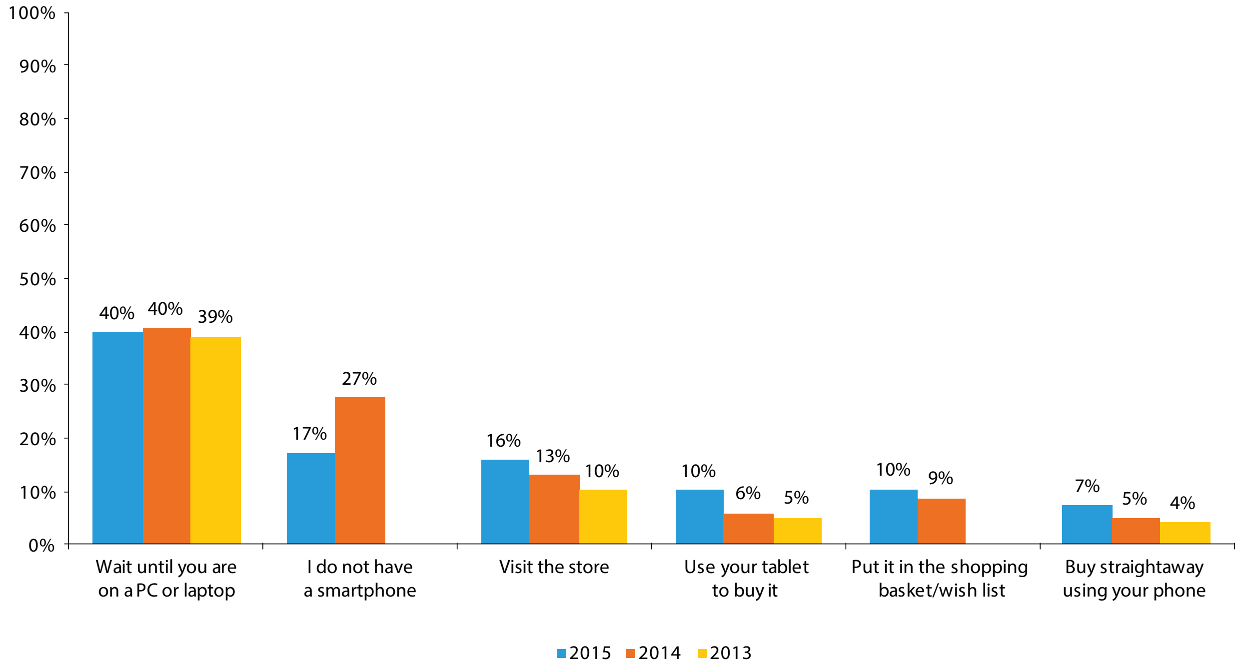


Consumers will check, and curate – that is read, open, forward, share or delete - their emails on a mobile device, and mobile curation is moving from PCs or laptops as the device of choice when consuming or managing emails. All behaviours increased on mobile devices at the expense of PCs or laptops.

Emails have to be mobile-ready, given the sharp increase in usage on mobile devices. Those that are not will find their way to the bin quickly and marketers will miss their opportunity.

Cutting through the noise has to be a focus on subject lines, which are the gateway to the email body content, the click, your landing page. Skilled copywriting will make a difference here, and there are new subject line optimisation services on the market such those by Touchstone and Phrasee.

4.4 Be multichannel



Note. New answer options were provided in 2015.

While curation is increasingly done on a smartphone or tablet however, the proportion who do not have a smartphone has decreased from 27% to 17%, the largest proportion (40%) would prefer to complete a purchase on a PC or laptop.

While 'mobile' is a catch-all term, tablets have larger screens making curation and purchase much easier than on a smartphone.

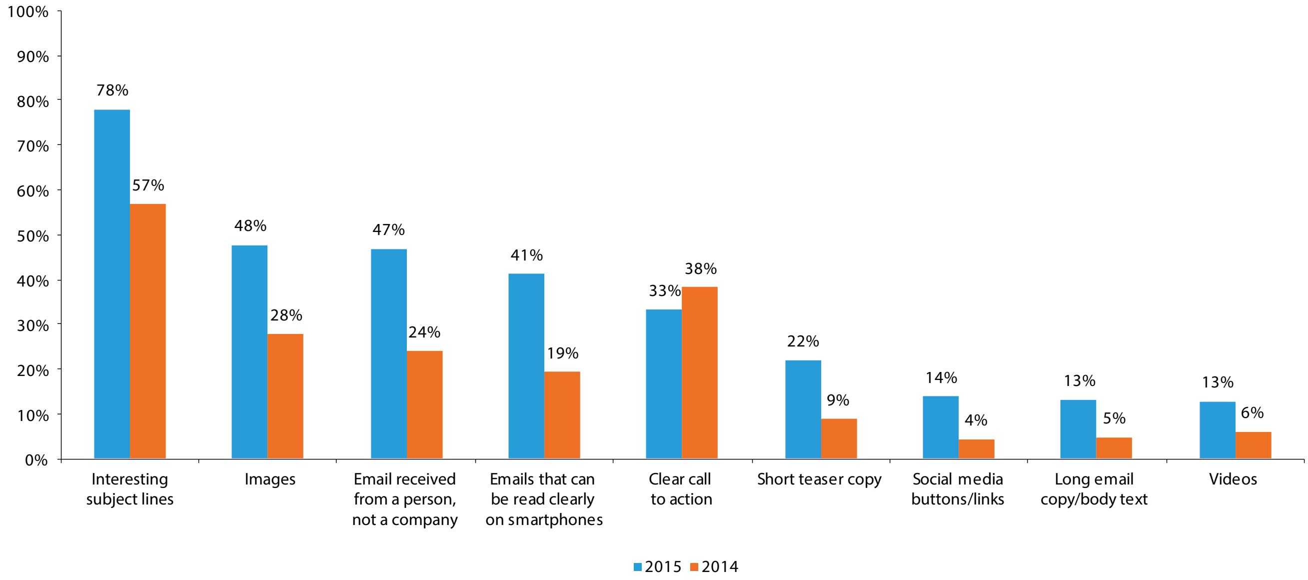
In addition, an increasing proportion (16%, up from 13% last year and 10% in 2010) opt to go directly to the store. While they are still reluctant to buy on their mobile device, this proportion is nevertheless increasing year on year, from 4% in 2013 to 7% in 2015. This will jump dramatically as mobile payment systems become easier to use and more widely adopted. There is a real first mover advantage opportunity here.

If consumers check their email on a mobile device, and 50% already do, then that email has to be mobile ready. However, they are (at the moment) unlikely to make a purchase on that mobile device, but might complete on a desktop later.

The user experience has to be good and consistent so brands to not lose business, and sites need to be easily navigable so that actions taken on a mobile can be easily completed later on a desktop. Failure to do this will inevitably result in lost sales/missed opportunities.

Perhaps emails opened on a smartphone are not the right place, or at least not yet the right place, for messages that drive readers to buy. Perhaps emails opened on smartphones should drive readers to a pre-purchase page or prompt them to mark the email as unread so it is easier to find later?

4.5 Be creative



Lastly, consumers want to be engaged.

Their preferences couldn't be more clear. They want:

- Interesting subject lines (preferred by 78% of respondents, up from 57% last year)
- Images rising from 28% last year to 48% this year)
- A personal touch (47% said and they wanted emails from a person, up from 24% last year)
- And they want all of this able to be read on a smartphone (41%, up from 19% last year).

Almost all measures increased compared to last year. There are two possible interpretations – that consumers are more aware of what engages them on email. Or, that the factors described above are indeed more attractive, possibly because consumers see less of the activities listed.

There is one exception – a clear call to action, down to 33% from 38% last year.

Possibly 'call to action' is marketing-speak so a little alien to consumers, the same with 'short teaser copy'. Or they do understand but a clear call to action is simply not interesting or engaging for them - if they are not interested, why click? However clear the call to action is?

Less important than a clear call to action were 'short teaser copy' (22%, up from 9% last year). Social media buttons/links (14%, up from 4% last year), long email copy/body text (13%, up from 5% last year) and videos (13%, up from 6%).

5. Summary

We know that email is preferred by both marketers and consumers from the recent Customer Acquisition Barometer research carried out earlier this year. But this system is not working as well as it should.

Consumers perceive brand messaging to have increased, and expanding consumer inboxes back this idea up. Fewer of these emails are interesting or relevant to consumers. Consequently the majority of these messages, so much of this work, is quickly consigned to the bin following a cursory assessment.

This curation is increasingly carried out on mobile devices - smartphones and tablets continue to cannibalise desktop and laptop email activity, although this is not true for purchasing. Consumers also manage their messages by opening multiple accounts to take their brand messaging and help them deal with the deluge.

Consumers employ a second form of curation by reducing brand messages and unsubscribing from brands to a manageable number – almost two-thirds (61.6%) have trimmed their marketing messages to between 6 and 20 brands.

Brands seem to be sending messages that are not relevant enough or not interesting enough to be valued. The majority (75%) of messages are deleted within 24 hours of arriving.

Marketers miss a significant opportunity. Consumers are better disposed to click and interact with good, relevant emails. Clearly, consumers want good creative, and skilled copywriters could help here.

Methodology

Questions for this survey were scripted in collaboration with DMA staff, dotmailer, and research suppliers. Wherever possible, questions were routed, and answer choices randomised to avoid top-box bias. In addition, an acceptable survey completion time was set and those answered too quickly were removed.

Beautiful Insights conducted the consumer survey with 1118 responses received from their YouSay customer panel. This is a closed panel which members of the public cannot voluntarily join and comprises approximately 90,000 profiled UK residents, recruited through numerous sources to demographically represent the markets based on gender and age. The online survey was then distributed to a random selection from Beautiful Insights' panel to gain a sample representative of the UK population, with a £250 prize draw as incentive. Participants were naïve to the purpose of the questionnaire prior to consenting to participate.

There were 23 questions in total, results reweighted by age and gender. The panel was constantly re-qualified to ensure current background variables.

The survey opened on 10/10/2015 and closed on 23/10/2015.

DMA staff compiled the findings presented in the present report.

In addition to the present report, the DMA produced an infographic which is live on the DMA website. The findings were launched at an event on 24th November 2015.

About dotmailer

Our mission

Put simply, our mission is to make it as easy as possible for marketers to get results that make a dramatic improvement to their business.

We continue to experience exciting growth in our business since we began in 1999. We're proud to have retained our culture and individualism over the years, and in particular our focus on making dotmailer a great place to work; we know that happy people equal happy clients and successful businesses.

Our heritage

dotmailer was founded in 1999. The aim was to enable organisations to grow their business through online channels. Made up of dotmailer, dotsearch, dotcommerce, dotagency and dotsurvey, the group's expertise covered the entire spectrum of online marketing and ecommerce.

Our future

Today, the group is solely focused on email marketing. It has grown to become a leader in the provision of intuitive Software as a service (SaaS) email marketing and cross channel tools. Even better, we've retained the people and knowledge of ecommerce and agency within our business.

dotmailer
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About DMA

The DMA provides guidance and support to help its members put their customers at the heart of their one-to-one communications to give them the rich benefits of a much more relevant, welcomed and effective relationship with each individual customer.

The DMA aspires to facilitate its members' marketing evolution with the opportunities, advice, support, networks and tools to be able to reach the sensitivity and sophistication of marketing to build their future prosperity – along with the success of the industry as a whole.

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