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DMA Insight: Marketer email tracking study 2016



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Introduction

Email is integral to most if not all modern marketing campaigns. How marketers use email is therefore crucial to the performance of those campaigns.

There is much email marketers can be happy about. Their work is recognised, and it is 'important' or 'very important' to the vast majority of businesses and brands.

This year we have made a more explicit link between this piece of research (formerly known as the National Client Email Tracker) and the preceding piece of research in this series, into consumer trends, the Consumer Email Tracker.

We have compared what consumers want to what marketers provide. These comparisons have shown some opportunities for email marketers.

We found that marketers tend to focus on their company rather than the customer in their mailings. It's understandable. But it misses an opportunity to match messaging to what really interests consumers.

This year we also saw that email marketers overestimate their abilities. There was no relation between how email marketing performed and the reported success. However, there was a relationship between performance (measured via ROI) and proficiency at testing.

Together, this shows an industry in the midst of significant change. Complexity comes from all angles – from the ways consumers manage their inboxes to the growing number of channels marketers have to contend with.

We also saw that marketers are struggling with email automation. Automation is often described as a panacea for email, but marketers still have to make the systems work. Investment in automation may yet pay off.

But both marketers and consumers agree on one thing – trust is essential. If customers, whether B2B or B2C, don't trust you then your marketing is going to be more difficult, regardless of any other factor.

Rachel Aldighieri

MD

DMA



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 DMA. 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

- WE vs YOU messaging

Marketers tend to rely on 'We' messaging - information about what your company is or does. Customers however want 'You' messages which specifically relate to them and their interests.

- Email has never been so important

Marketers increasingly rate email as 'important' or 'very important' to achieve their objectives. Those that say this have increased in proportion from 89% to 93% between 2012 and 2015. The vast majority of email marketing is carried out in-house.

- Correlation between skill at testing and ROI

Competence in email marketing does not correlate with reported email performance. But proficiency in email testing does correlate positively with reported email ROI. Either email testing increases email performance, or those campaigns that have performed well have also been tested.

- Problems with automation

Marketers talk eagerly about marketing automation. Our results suggests low uptake of marketing automation, and low returns. This may be due to investments yet to pay off, lack of competence, lack of data, difficulty in calculating ROI. Or, that automation is the Emperor's New Clothes of marketing.

- Increasing problems determining ROI

ROI is not just a problem for those engaging in automation. It's an increasing problem for the whole industry. Those able to calculate ROI has fallen steadily since 2012. In 2015 half of marketers could calculate the ROI on their marketing. For B2B marketers, the situation is worse still and the proportion unable to calculate ROI rises to 60%.

- Skills decreasing

As marketing complexity increases, so do the challenges for marketers. Email marketing is no exception. New technologies (such as automation), new targeting techniques and new ways of working mean that email marketers struggle to keep up.

1. How brands and marketers use email

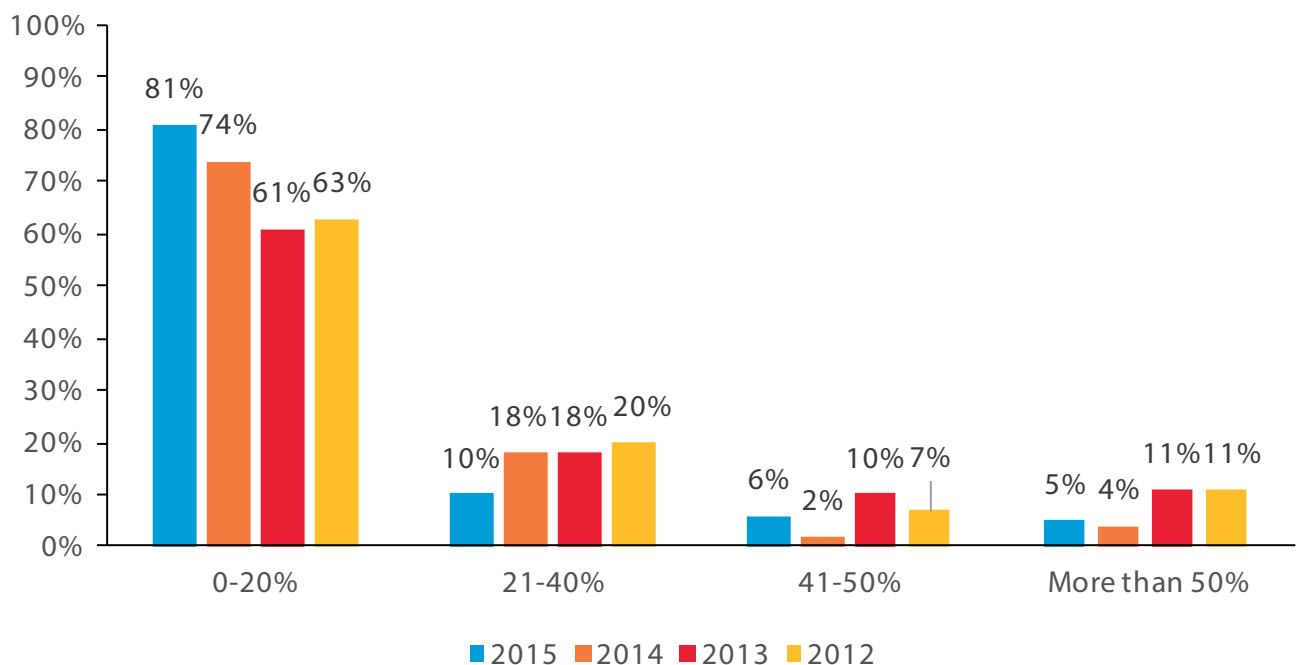
Email has grown substantially in stature as a medium since its initial development amongst military in the 1960s and the academic fraternity in the 1980s.

Today, it's almost impossible to imagine marketing without email as a key component.

But are marketers doing email well? Whilst email has become habitual, are marketers reaching their goals? Our research looked at email marketers working at the end of 2015.

Email marketers rank sales and engagement as the top two objectives for their email marketing with customer retention third.

What percentage of your marketing budget is spent on email?



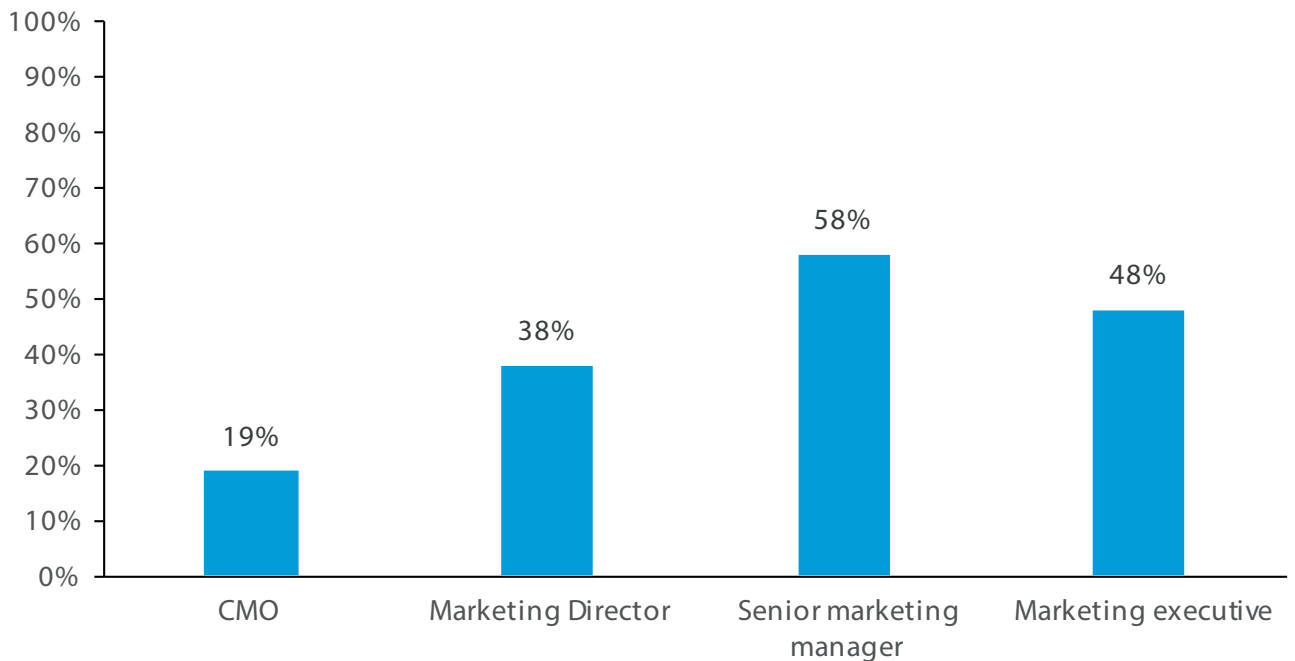
The majority of brands spend a minority of their marketing budget on email.

Email has always been relatively inexpensive and cost per thousand impressions (CPMs) have been dropping, so in 2016 59% spend between 0% and 10% of their marketing budget this way, with more than one in four (27%) spending between 11% and 25% of their budget on email.

Those spending up to 20% of their budget on email marketing has increased from 63% to 81% since 2012. Email has remained an essential part of any marketing campaign, but budgets have shifted as new media have proliferated.

One in 20 of respondents spend more than 50% of their marketing budget on email.

Who do you involve in your email marketing?



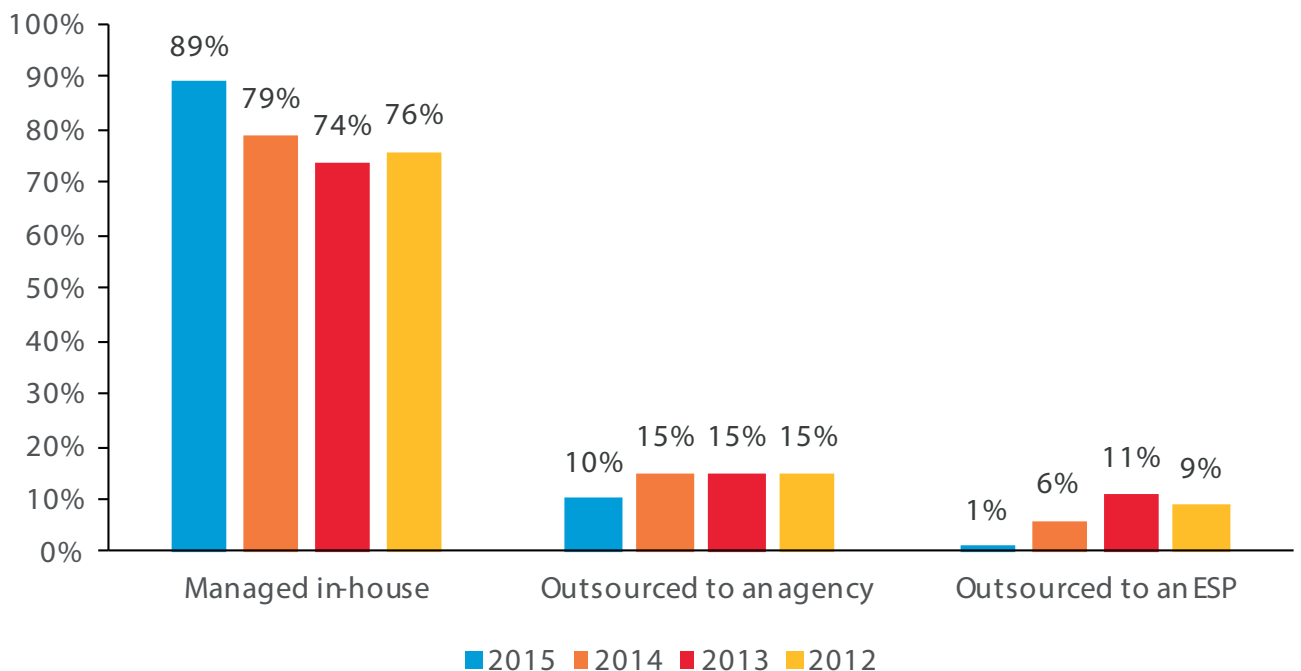
Email marketing is primarily the concern of mid-level and junior members of the marketing team. When asked who is involved in email marketing, the most popular choices are ‘marketing executive’ (48% chose this option) and ‘senior marketing manager’ (58%). Less than one in five respondents chose CMO, whilst 38% selected ‘marketing director’.

This is somewhat surprising. Email marketing has increased in importance year-on-year, according to marketers. Despite a dip in 2013, between 2012 and 2015 those who rate email marketing as ‘very important’ or ‘important’ has risen from 89% to 93% of those surveyed over that time.

Nevertheless, less than one in five of CMOs, and less than two in five of marketing directors appear to be involved in email marketing campaigns. It could be that senior marketers delegate the execution to more junior colleagues

Senior marketers will be concerned about budget. If the majority of marketers spend a minority on email marketing, those senior marketers are more likely to be involved in those areas where the majority of budget is spent.

What percentage of your email marketing programme is managed in-house or outsourced?

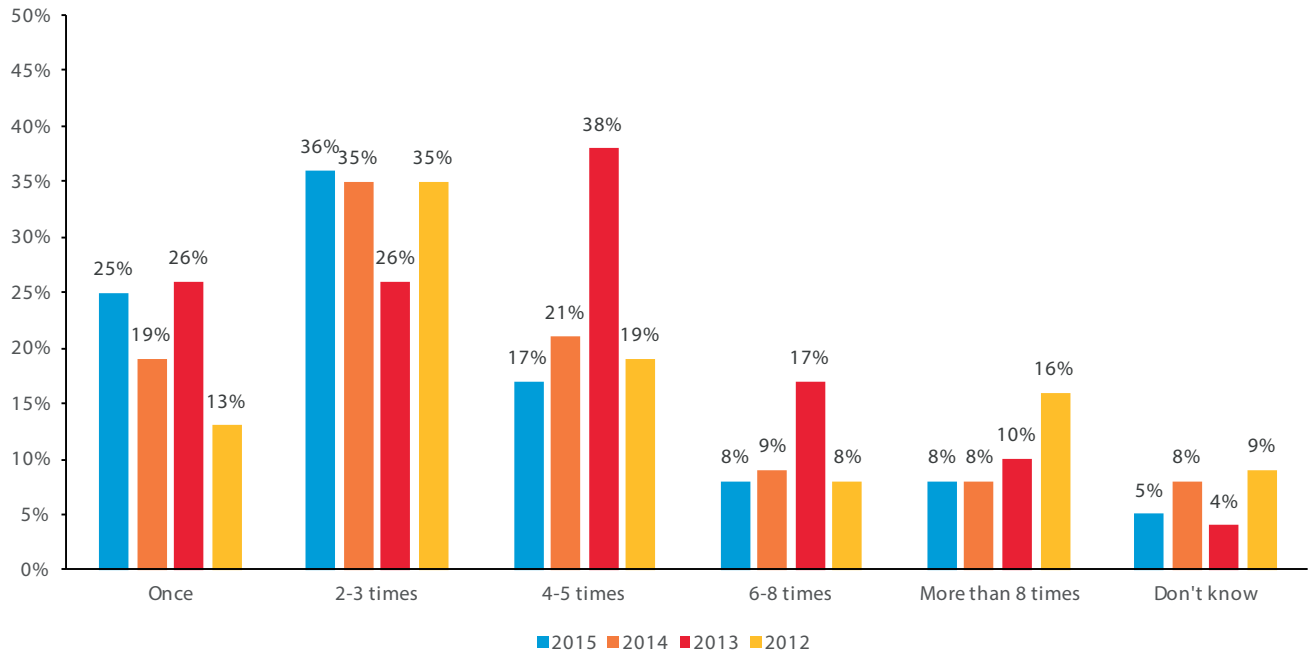


Whether B2B or B2C, the vast majority of respondents carry out their email marketing in-house, a proportion that has steadily increased to nearly 90% from a low of 74% just 2 years ago. The proliferation of easy to use web-based and Software as a Service (SAAS) solutions is a factor here.

Of the 10% who outsource to an agency, more than half (5.3%) outsource these skills to an email agency (the remainder to other agencies, such as a digital agency, or a creative agency, etc.).

A smaller proportion (1%) outsource to an ESP, a figure that has dropped from 9% in 2012 and 11% in 2013. Could ESPs be losing ground to other service providers by failing to distinguish their service?

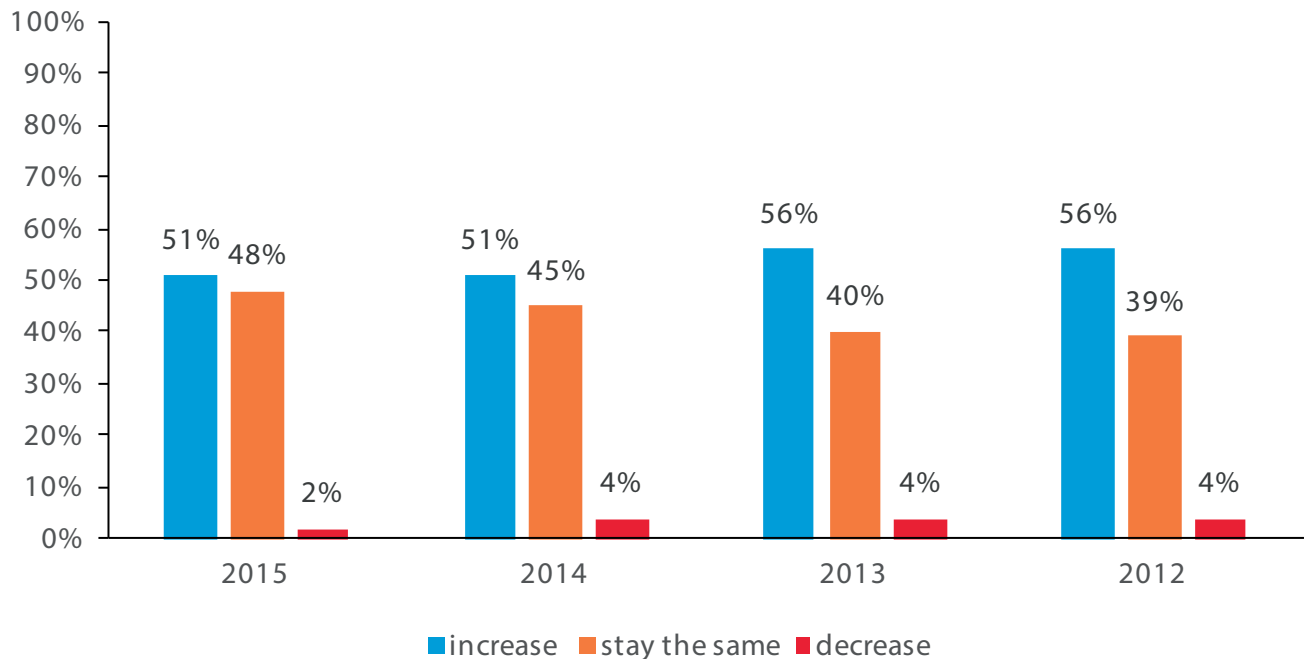
What is the maximum number of times you contact an email address in a month?



In 2015, 53% of brands sent between two and five emails per month. This suggests consumers routinely underestimate the number of emails they receive.

According to data from the DMA Consumer Email Tracker (2015), consumers sign up to an average of 9.8 brands. If each brand sends an average of 3.72 mails per month, then consumers would receive, on average, 36.46 mails. In the Consumer Email Tracker, they reported 28.8 emails per month, underestimating the total by 27%.

Looking forward, how would you expect your company's email marketing budget to change over the next 12 months?



Every year since 2012, brands and marketers have predicted that budgets will increase the following year, and this trend has continued in 2015.

The difference between those who predict an increase in budget and those who predict no change has narrowed since 2012. In 2012 56% predicted an increase in budget with 39% believing there would be no change. This has narrowed to 51% and 48% respectively.

As overall budgets have increased consistently, despite generally gloomy economic predictions, this is unlikely to be a factor of the overall economy.

The proportion predicting a decrease in budget has fallen from 4% between 2012 and 2014 to 2% in 2015.

It's important to note that the proportion of budget spent on email has decreased consistently over the past four years (see above), with those spending between 0% and 20% of their budget on email rising from 63% to 81% since 2012.

This information, taken with the information in the chart above, seems to indicate that budgets have actually fallen, despite optimistic predictions year-on-year since 2012

But overall marketing budgets have increased over this time, by 5.9% between 2013 and 2014, an estimated 6.1% for 2015 and 5.6% predicted for 2016 according to Warc¹ While the proportion of overall spend going to email marketing has decreased, email marketing budgets may well have risen over time.

1. Advertising Association/Warc Expenditure Report Q3 2015

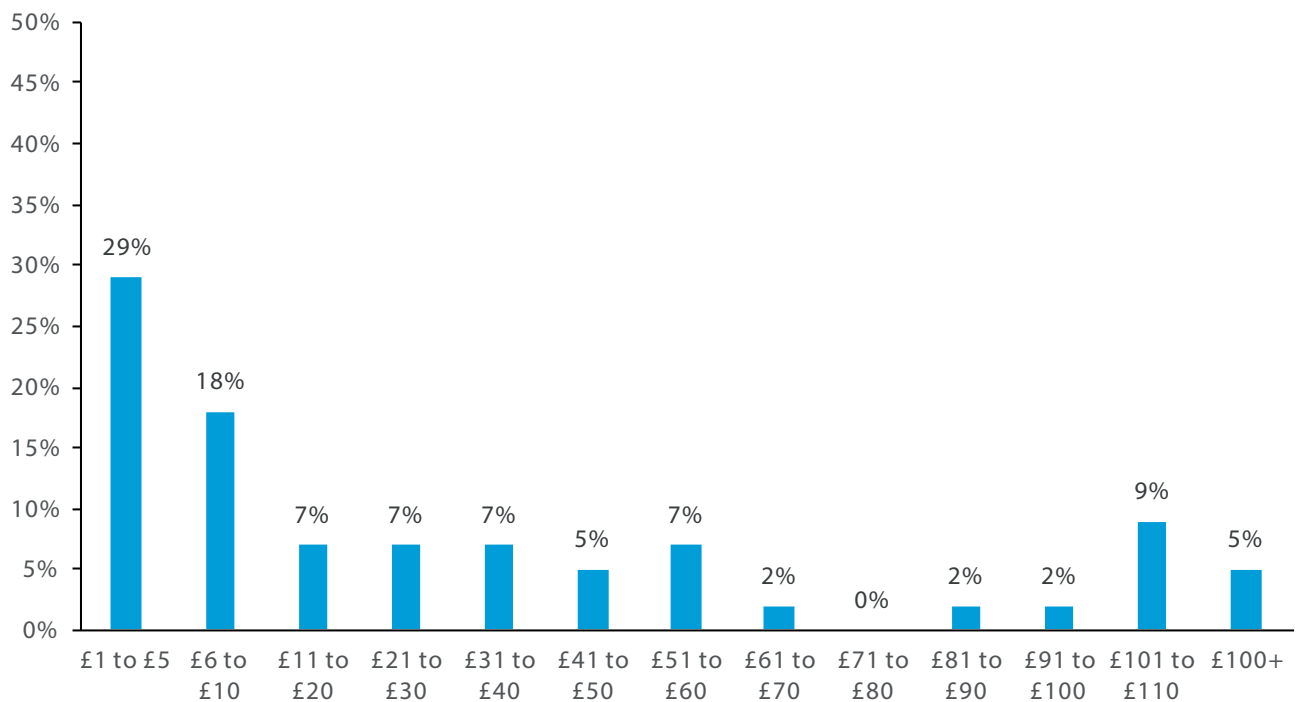
2. Email performance in 2015

Email remains a medium it's possible to make healthy returns with.

DMA's Consumer Email Tracker research from 2015 suggests that a significant proportion of consumers who receive emails that interest them will not always respond to the click offered, and instead turn to search, to social or even look in-store.

ROI from email campaigns may therefore be greater than basic metrics indicate if, for example, consumers go to a store rather than taking the click. Last click attribution is not working as well as it used to for email.

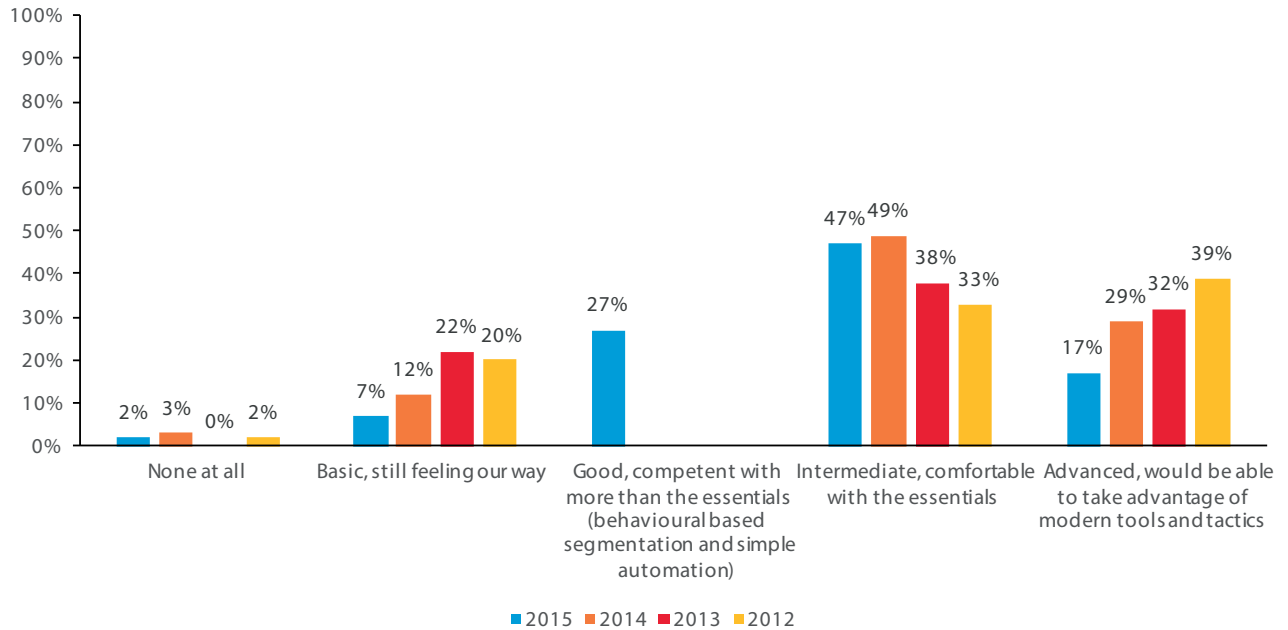
How much is the approximate return you get back for every pound spent on email marketing?



Nearly half (47%) of marketers surveyed earn between £1 and £10 for every £1 invested in email marketing; 14% earn more than £100 for each £1 invested, with 1 in 20 claiming that for every £1 invested in email they earn at least £110 back.

On average, those engaged in email marketing make a return of £29.64 for every £1 invested. For those who can measure it, email continues to represent a strong return on investment.

How would you rate your company's overall level of competence in email marketing?



Competence in email marketing has started to coalesce around the mid-scale, representing mid-ability. Fewer respondents claimed to have 'advanced', 'basic' or 'no' skills.

Since 2012, the proportion who say that their competence in email marketing is 'advanced' has dropped consistently, more than halving from 39% (two-fifths), to 17% (less than one-fifth of respondents) in 2015.

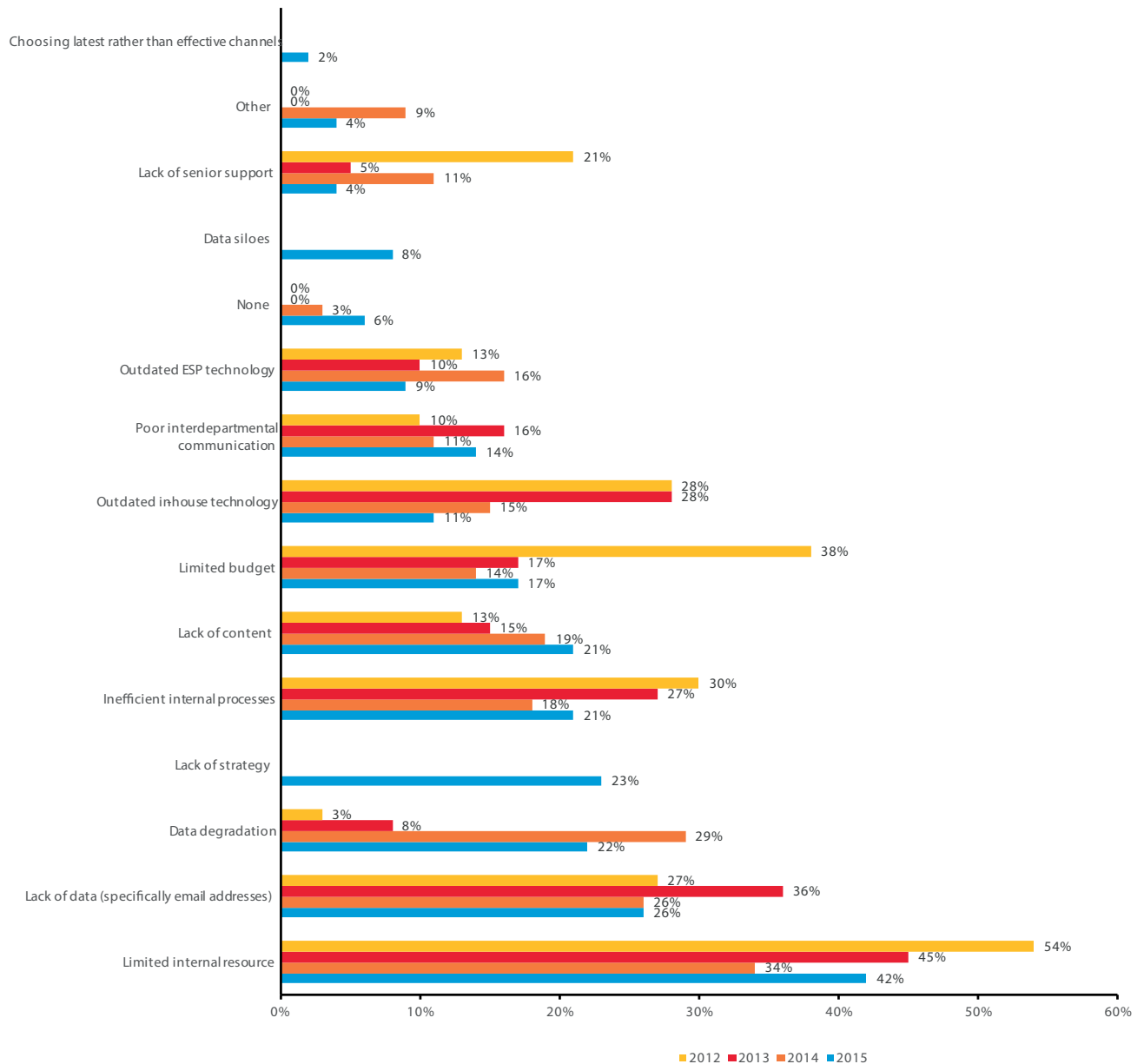
Those who classify their knowledge as 'basic' has reduced from 20% to 7% between 2012 and 2015, while the majority are in the middle of the table, with 74% (three-quarters) of respondents describing their competence as 'good' or 'intermediate'.

Worryingly for a survey of email marketers, when asked about their competence, 2% claim to have 'none at all'.

With so many campaigns run in-house it's possible that some brands miss out on sophisticated methods of targeting or execution that could come from working with an agency, ESP or email marketing specialist.

We shouldn't be surprised that it's a struggle to keep up with consumers' constantly evolving behaviour. Just to stand still requires a constant need to learn, absorb and adjust.

What are the most significant challenges to successfully executing your email marketing programmes? You can select up to 3 choices



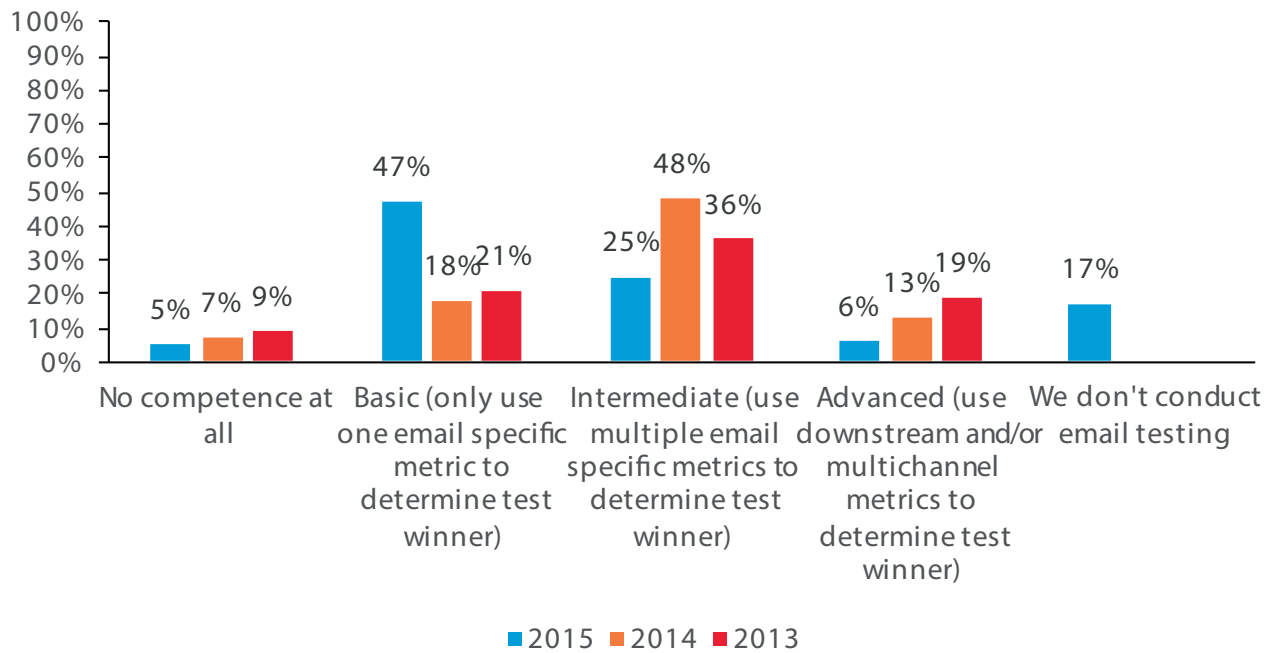
'Limited internal resource' remains the single most significant challenge to email marketers as it has done since the DMA first commissioned this survey, with 42% choosing this option. Again, as the majority of campaigns are run in-house, this may represent an opportunity for agencies or ESPs to assist.

However, if we add together those responses that explicitly relate to data: 'lack of data', 'data degradation' and 'data silos' this comes to 56% of the total. Data is therefore the single greatest challenge to email marketers in 2015, closely followed by 'limited internal resource'.

Additional concerns were: 'Lack of strategy' (23%), which could marry-up with the lack of participation by CMOs in email marketing; 'inefficient internal processes' (21%), indicating operational challenges; and 'lack of content' (21%) which may be an imagined barrier, as consumers indicate they are uninterested in content (see below).

Are marketers aware of their limitations and competencies if the majority manage their messages in-house and aren't exposed to expertise outside their organisation?

How would you rate your company's overall level of competence in email testing?



While three-quarters of respondents said their competence in email testing was 'good' or 'intermediate' overall, almost a quarter (22%) said they had 'no competence' or 'don't conduct' email testing.

Almost half (47%) said they have a basic competence in email testing and used a single metric to measure success. This demonstrates a low take-up of 'test and learn' amongst client marketers.

Testing is one way to ensure that email marketing campaigns deliver what they should. It seems that the majority of respondents have not progressed beyond 'basic' testing. This is likely to be down to one of three factors – competence in conducting more complex tests, particularly if there is an in-house bias; data issues compromising or degrading the possibility to record and observe results in the first place, or available resource.

3. Testing vs ROI

If we correlate the responses for various questions against those for ROI, we do not find any significant correlation.

With one exception – proficiency in email testing correlates positively with ROI.

- Competence-ROI correlation graph

If we correlate overall competence in email marketing with the return for every £1 invested, there is no correlation.

Email marketers may be overestimating their competence.

- Testing-ROI correlation graph

But if we compare competence at email testing with return for every £1 invested, there is a strong positive correlation.

Those marketers who are better at email testing generate the best returns. 'Testing' appears to be a more accurate predictor of proficiency in email – if we equate skill to ROI – than actually asking marketers how proficient they are. They overestimate their skills.

Please rank how the following types of emails in how much return they generate for your organisation?

Email type	Rank
Targeted email to specific segments only	1
Emails to different segments covering the whole list	2
Unsegmented email to whole list	3
Activity-based triggers	4
Lifecycle-based triggers	5

Targeted segments are the most likely to generate good ROI according to marketers, followed by tailored emails to the whole database. After this, the story becomes more complicated.

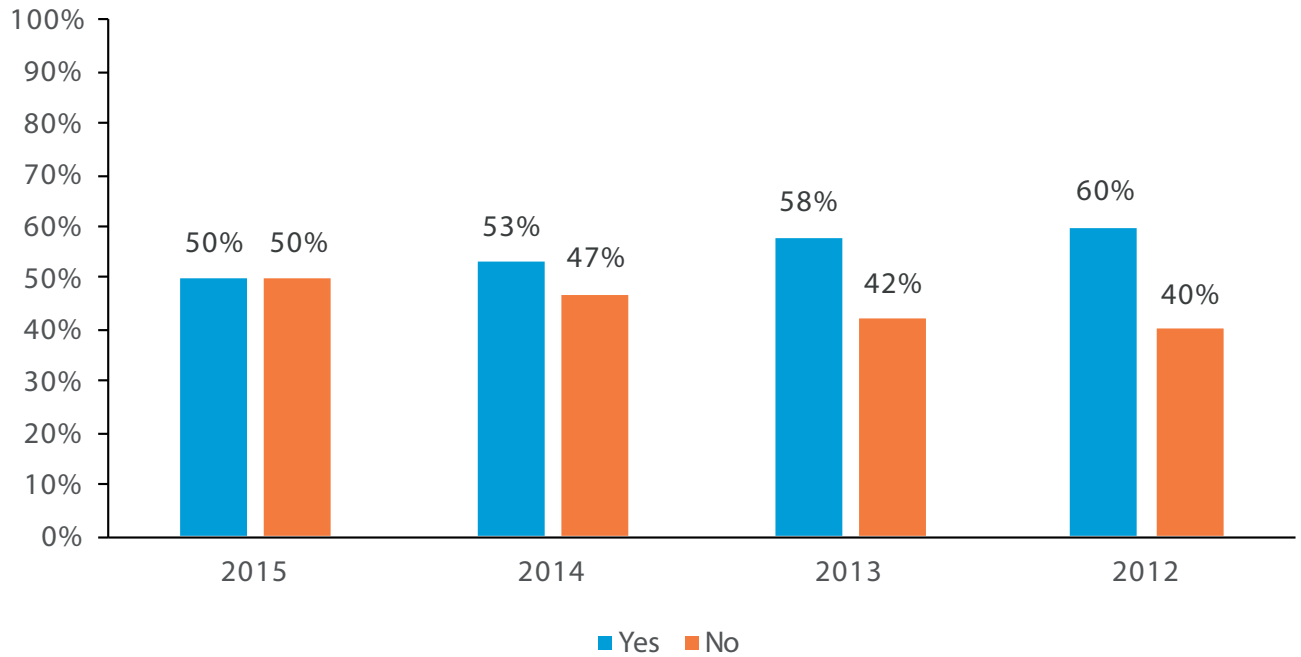
Marketers' third choice for generating good ROI is to mail to the whole database – less targeted, less personalised and more wasteful.

Below that, email marketers ranked activity and lifestyle-based triggers – both hallmarks of email automation. Automation should improve targeting, personalisation and reduce waste, and so drive-up ROI. These low rankings may point to a number of issues email marketers typically grapple with:

- Slow uptake of automation techniques or software, and so low response rate in this survey
- High investment in automation, so ROI remains low for now, but may increase later
- Lack of understanding of the benefits of automation
- Lack of competence in calculating ROI

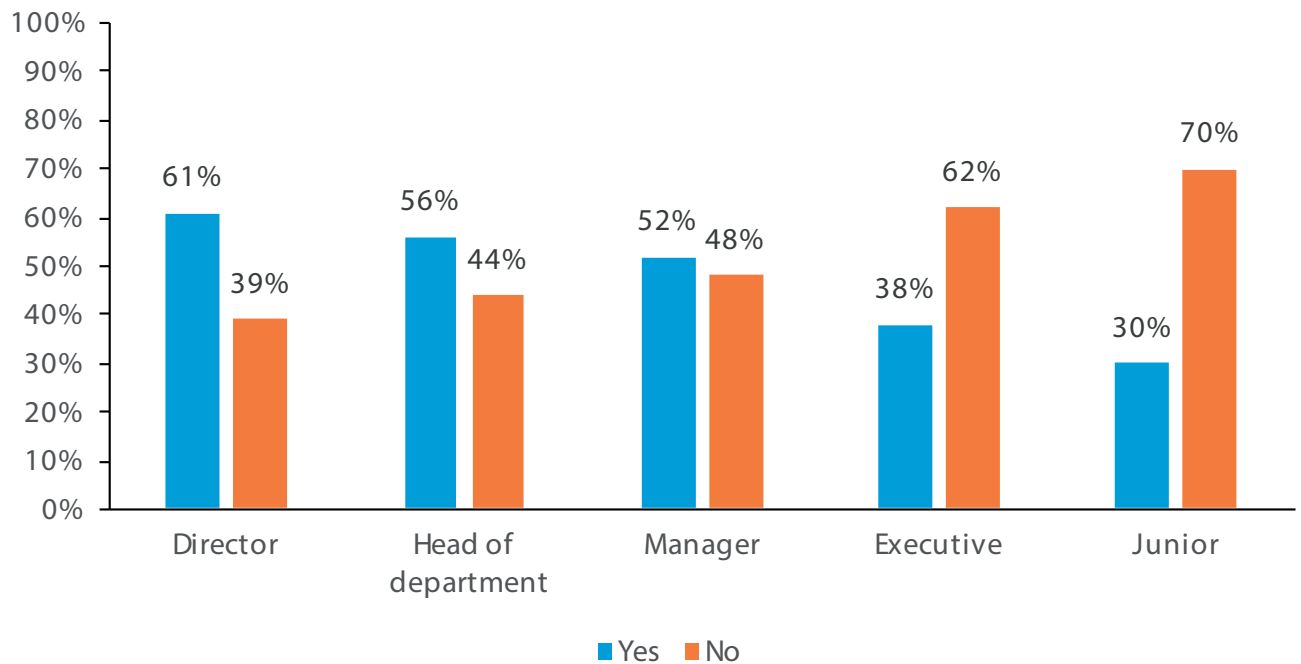
Marketers rate segmented audiences as giving the highest returns. It may be that the current operation of email campaigns – generally to segmented audiences but without behavioural or lifestyle triggers – are perceived to be sufficient.

Consumers indicated in the Consumer Email Tracker 2015 that relevant emails are attractive to them. Automation techniques, if executed correctly, should help give consumers those more relevant email and customer journey they want.

Are you able to calculate the return generated from your email marketing activities?

The more senior the position in a company, the more likely the marketer is to say they are able to calculate ROI. As we know that those involved in email marketing tend to be at the manager or executive level, those working at these operational levels and below indicate that they cannot, 32% yes to 41% no.

This could indicate one of three things – that senior managers have the capability to calculate ROI but do not pass this information down to their more junior colleagues, or that they are mistaken. Or that junior marketers may not be measured on ROI, but on metrics like open or click-through rates and they are not required to make ROI calculations.

Are you able to calculate the return generated from your email marketing activities?

ROI is one of the most useful measures of marketing success. Yet year-on-year, the proportion who can calculate ROI from email marketing has fallen.

Over the past five years the world has become increasingly complex. As was noted above, progress in technology and its corollary the online world, has made the science of attribution harder than it was already acknowledged to be.

However, econometric approaches to calculating ROI should give some basic indications of the effectiveness of campaigns that involve transactions.

Two factors may be at play here.

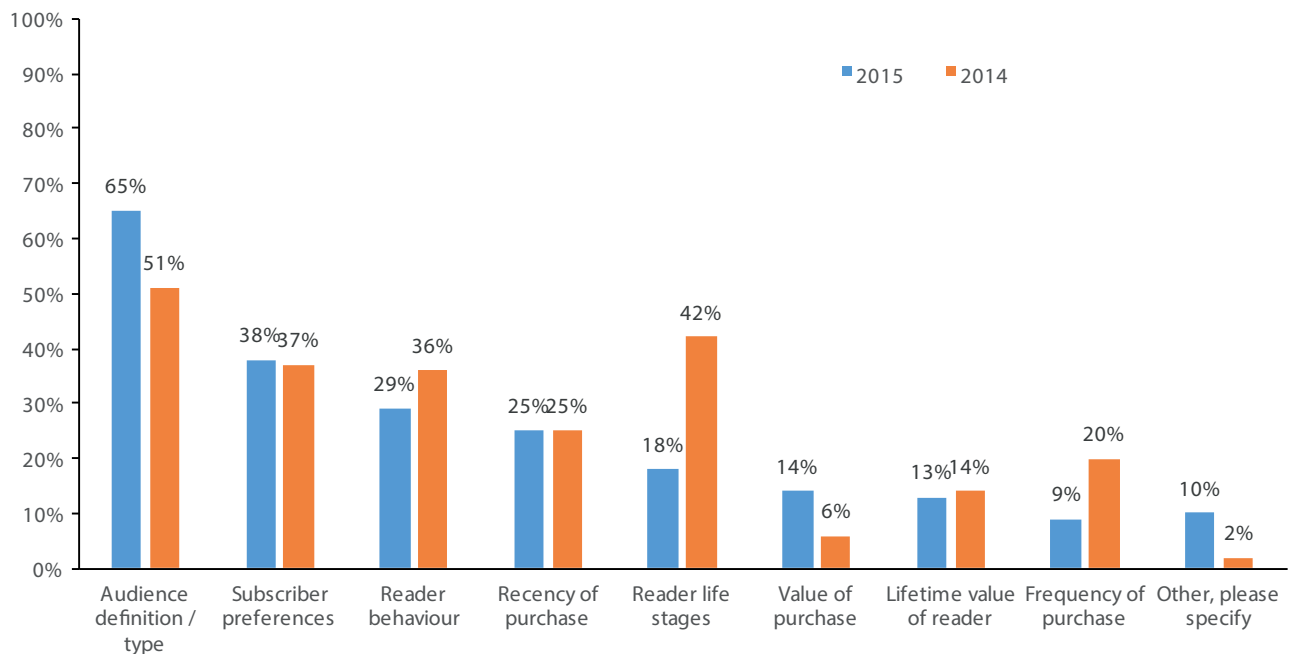
Firstly, as described above, marketers lack adequate data.

Secondly, according to the Consumer Email Tracker 2015 research, consumers frequently choose not to take the clicks offered in brand emails, and instead take to social media, to search, or take the information offline to a store. This would mean those consumers that take to search would be attributed to search, not email, those who take to social would be attributed to social and so on.

Those marketers using last-click attribution will find ROI calculations increasingly complicated. Those using other metrics will find increasingly complexity from the growing proliferation of channels and media.

Both of these factors make attribution more difficult, and impede ROI calculations. More sophisticated techniques such as automation or employing a full-service ESP may help.

What are the key contact segments you use in your email marketing programmes? You can select up to three choices.

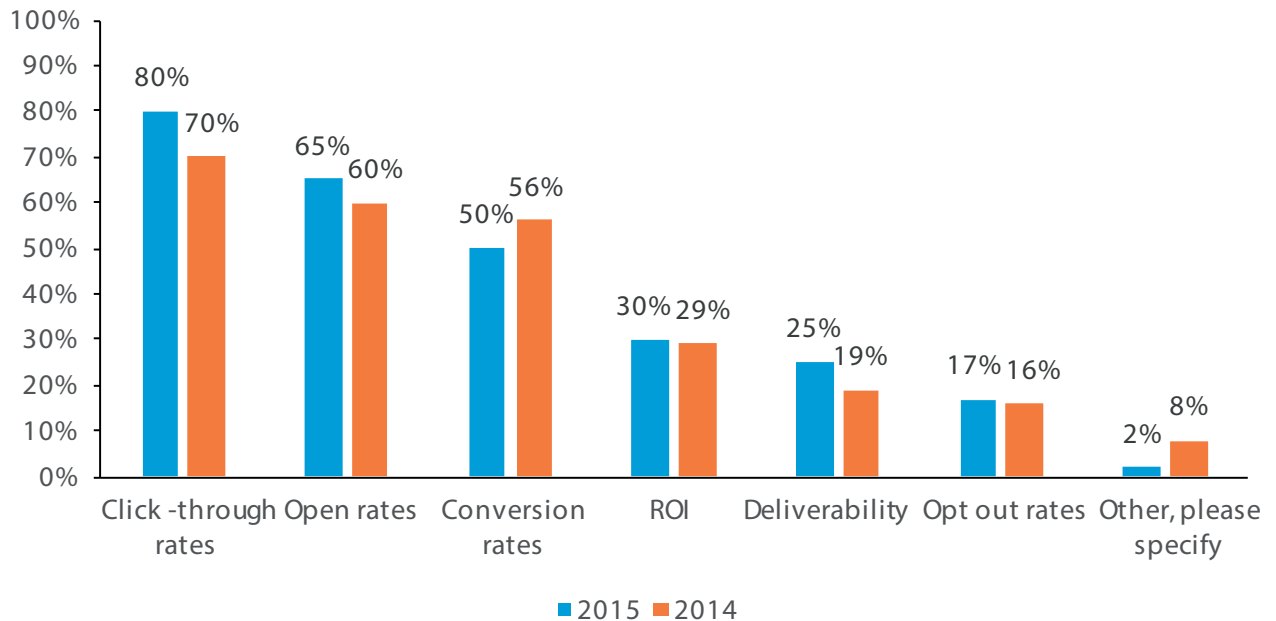


Triggers typically used for automation have fallen as segment choices over the past year from 35% to 29% for 'reader behaviour' and from 42% to 18% for 'reader life stages'.

Over the same period, defined audience segments have increased from 51% to 65%. Matched to ROI generated by different targeting methods, this suggests that marketers may be abandoning automation in favour of defined segments, which have a more reliable, greater ROI.

Alternatively, basic segmentation may be increasing in sophistication and accuracy.

What are the most important three metrics you use to evaluate the effectiveness of your email marketing programmes? You can select up to three choices.



Fewer than one in three email marketers (30%) said ROI is one of the most important metrics to measure, possibly because falling numbers of email marketers are able to calculate this figure in the first place.

The majority choose vanity or process metrics as the most important measures for campaign effectiveness, such as click-through rates (80%, up from 70% in 2014), open rates (65%, up from 60% in 2014), and conversion rates (50%, down from 56% in 2014).

4. We vs You

Copywriters will tell you that poor copywriting focuses on what 'We' (our company) is doing, rather than on what 'You' (the consumer) want or need.

This common mistake misunderstands one fundamental truth: consumers will only be interested in your company if it can do something worthwhile for them.

What types of email message / content helps you to achieve your campaign objectives? You can select up to five choices.



A We vs. You disparity emerges from the messages or content that marketers make and those messages or content consumers say are effective.

Marketers say 'content', 'advance notice of new products', 'user guides' and '% discounts' are the most effective ways to achieve campaign objectives. All except % discounts are 'We' messages – what our company and our marketing are doing.

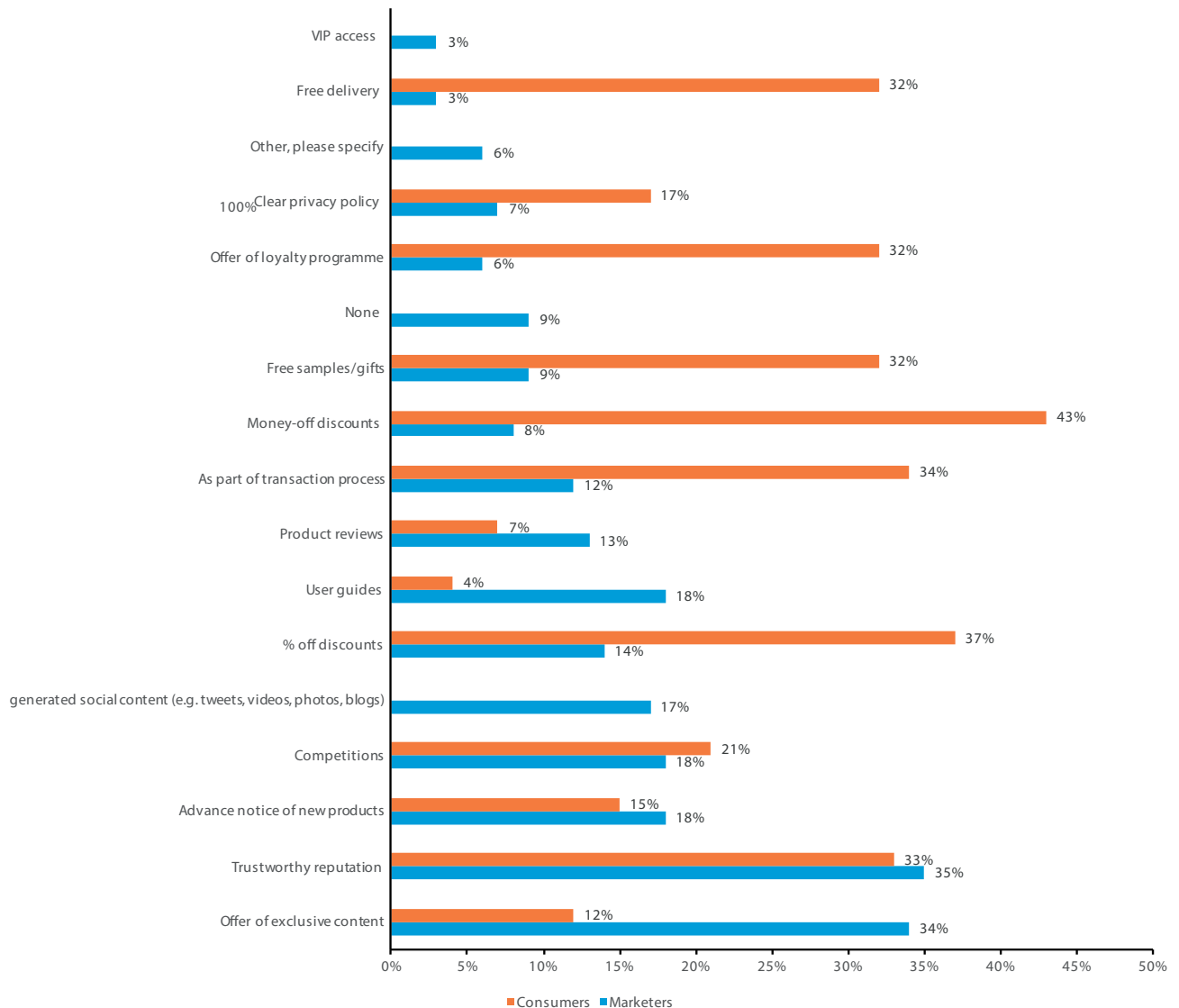
Conversely consumers disagree almost entirely (information taken from the 2015 Consumer Email Tracker report).

They have scant regard for content, new product information or user guides, although they do appreciate discounts.

Consumers have a high regard for 'money off discounts', preferring them even to % discounts, 'loyalty programme rewards' (chosen by only 11% of marketers), 'free delivery' and 'free gifts/samples', all messages that could easily switch the focus from 'We' the company to 'You' the consumer.

Marketers could find their email metrics would improve if they switched the focus of their emails from 'We' to 'You' messaging.

Considering your email marketing programme, which are most effective in encouraging consumers to sign up for your emails? You can select up to three choices.



When looking at what makes a person sign up to brand email messages in the first place, there is again a significant disparity between what marketers say is effective against what consumers say, taken from the Consumer Email Tracker 2015.

Consumers want ‘% discounts’ (37%), ‘money off discounts’ (43% - the top score), ‘free samples’ (32%), ‘loyalty points’ (32%) and ‘free delivery’ (32%). They also expect to sign up to campaigns as part of the buying transaction (34%).

Consumers want clear, tangible benefits from companies they trust.

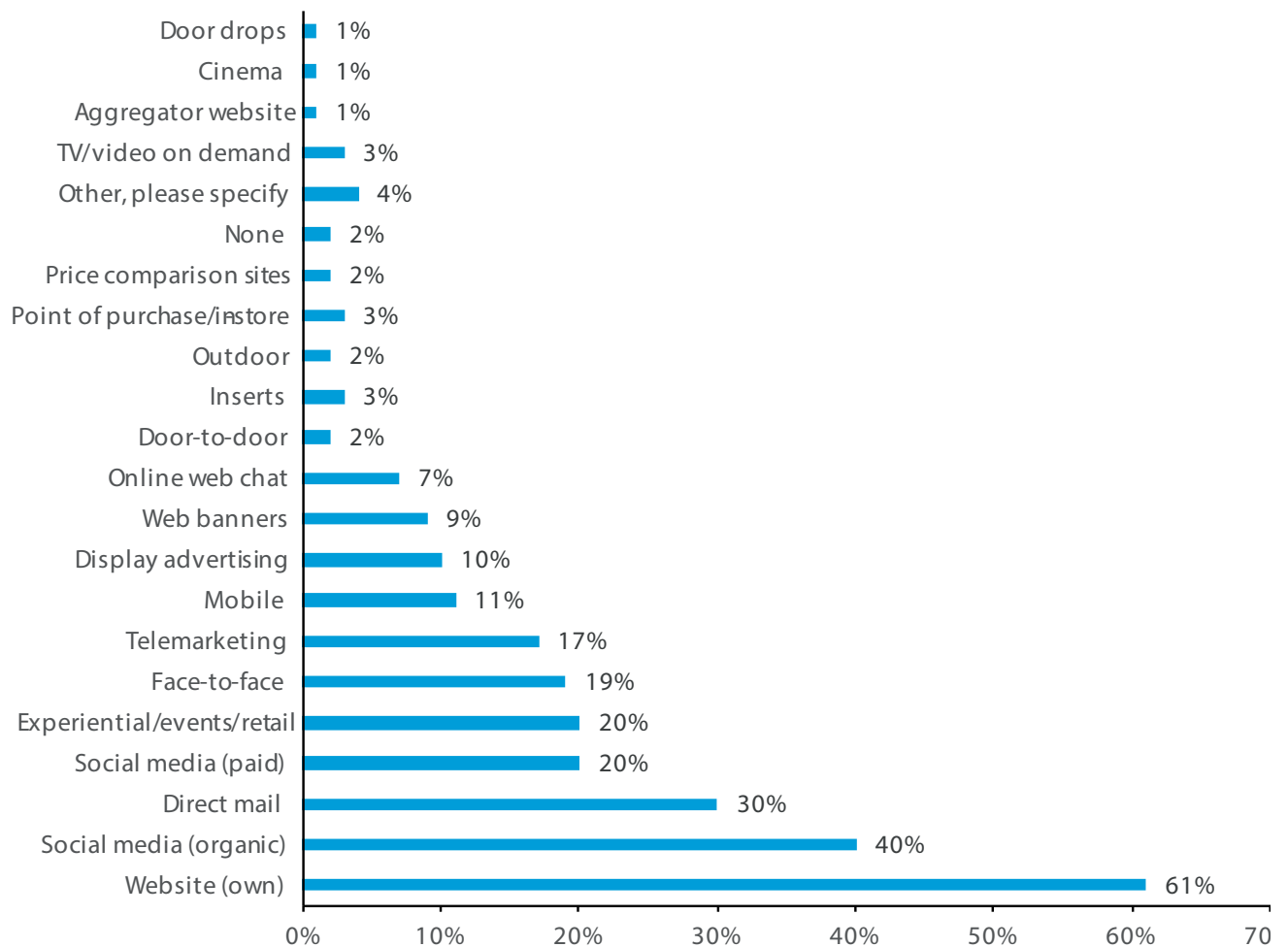
But that’s not usually what they are offered.

When asked for the most effective tactics for encouraging consumers to sign up to their emails in the first place, marketers say exclusive content (34% - consumers do not agree, only 12% said content would persuade them to sign up), notice of new products (18% to 15% of consumers) and competitions (18% to 21% of consumers).

Marketers again skew to ‘We’ messaging, rather than the ‘You’ messaging where benefits are to the consumer. This could be down to the lack of testing highlighted above.

More than one-third of both groups agree that a trustworthy reputation is essential (35% of marketers to 33% of consumers).

Considering your contact strategy, which channel(s) integrate with email most effectively to realise your campaign objectives? You can select up to three choices.



When considering what works well with email marketing, three responses stand out – brand website (61%), organic social media (40%) and direct mail (30%), with all remaining responses accounting for 20% of the total.

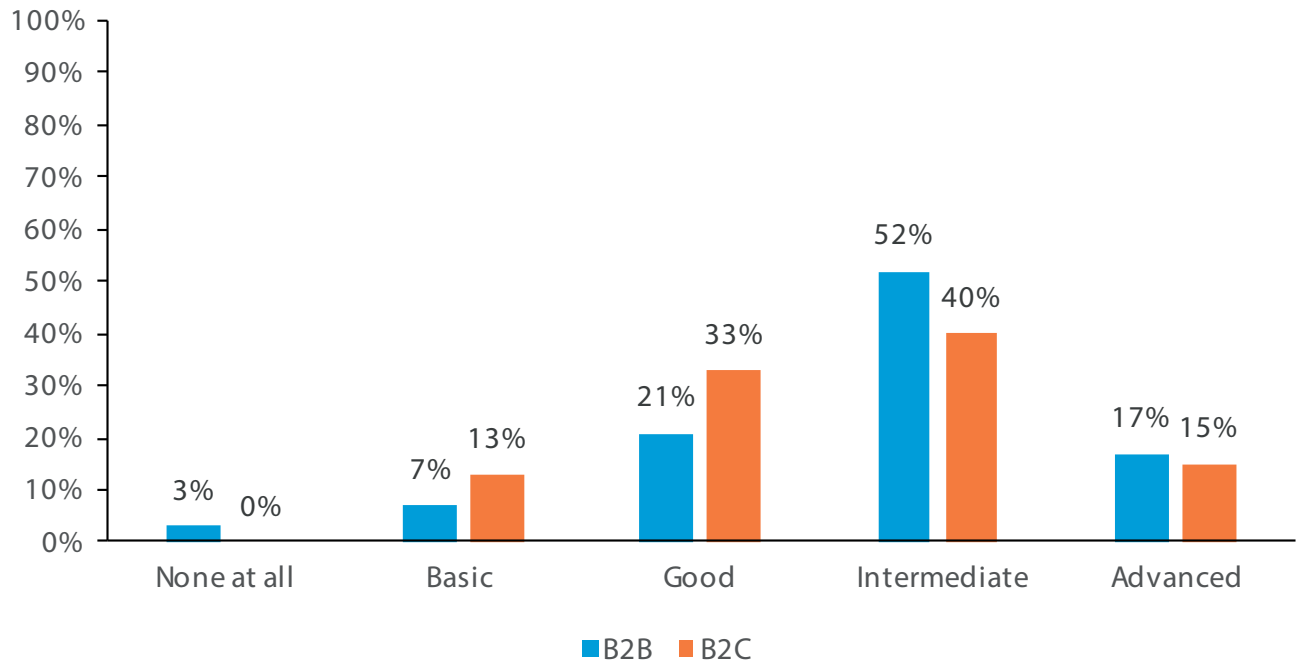
Though integrating email with their own website is the most popular choice it is perhaps surprising this proportion isn't higher than the 61% who selected it. Most email CTAs would presumably drive to a home website. Social media integration is also now routinely included in email messages.

More interesting is the third option 'direct mail', chosen by 30% of respondents, suggesting brands successfully drive consumers from offline to online, using vanity or personalised URLs, or promotional codes.

5. B2B

There are also marked differences between the approaches of B2B and B2C marketers that emerge from our research.

How would you rate your company's overall level of competence in email marketing?



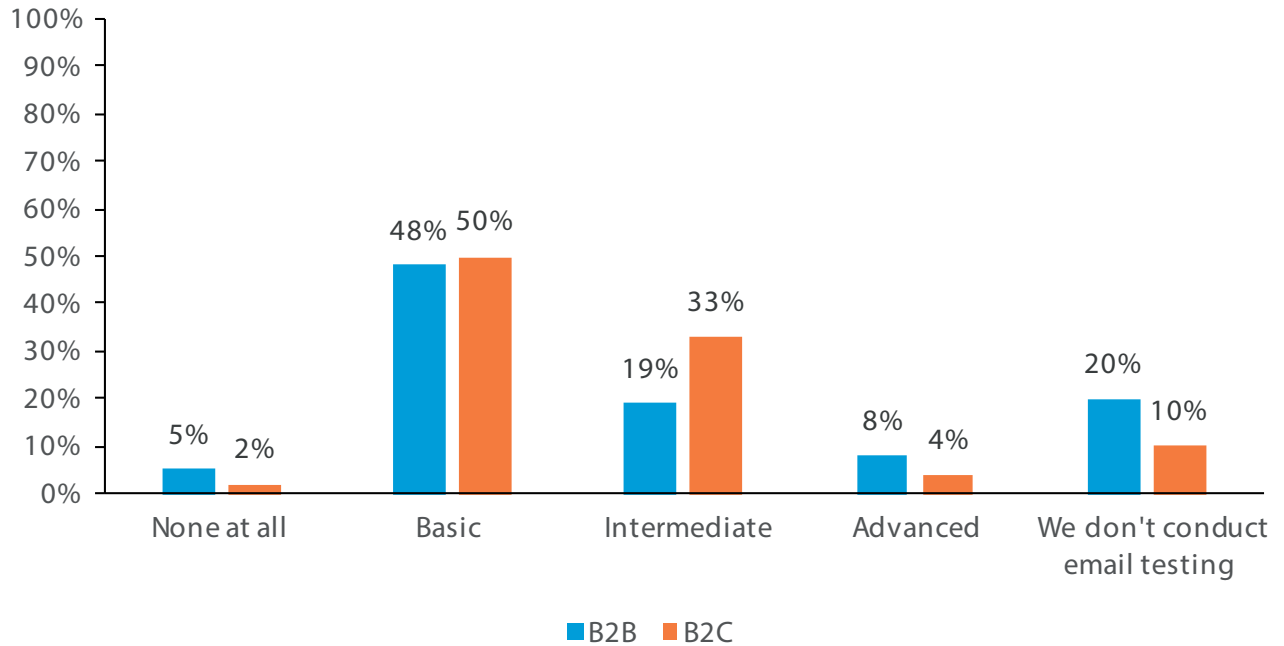
If we split the question on competence into B2B and B2C, then the B2B community rate themselves to be on average more advanced than their B2C counterparts, with 69% of B2B respondents saying they were 'intermediate' or 'advanced', compared to 55% of B2C respondents.

B2B marketers often have more tightly defined customer journeys and longer sales cycles than B2C marketers.

However, 3% of B2B marketers said they had no email marketing competence, with 46% of B2C marketers rating themselves 'basic' or 'good' compared to 28% of B2B marketers.²

² 'Good' was a new choice for marketers this year.

How would you rate your company's overall level of competence in email testing?



When we split competence in email testing by B2B and B2C, a quarter (25%) of B2B marketers either conduct no testing or claim to lack any competence. By contrast, the proportion of B2C marketers responding to this question is almost half this at 13%.

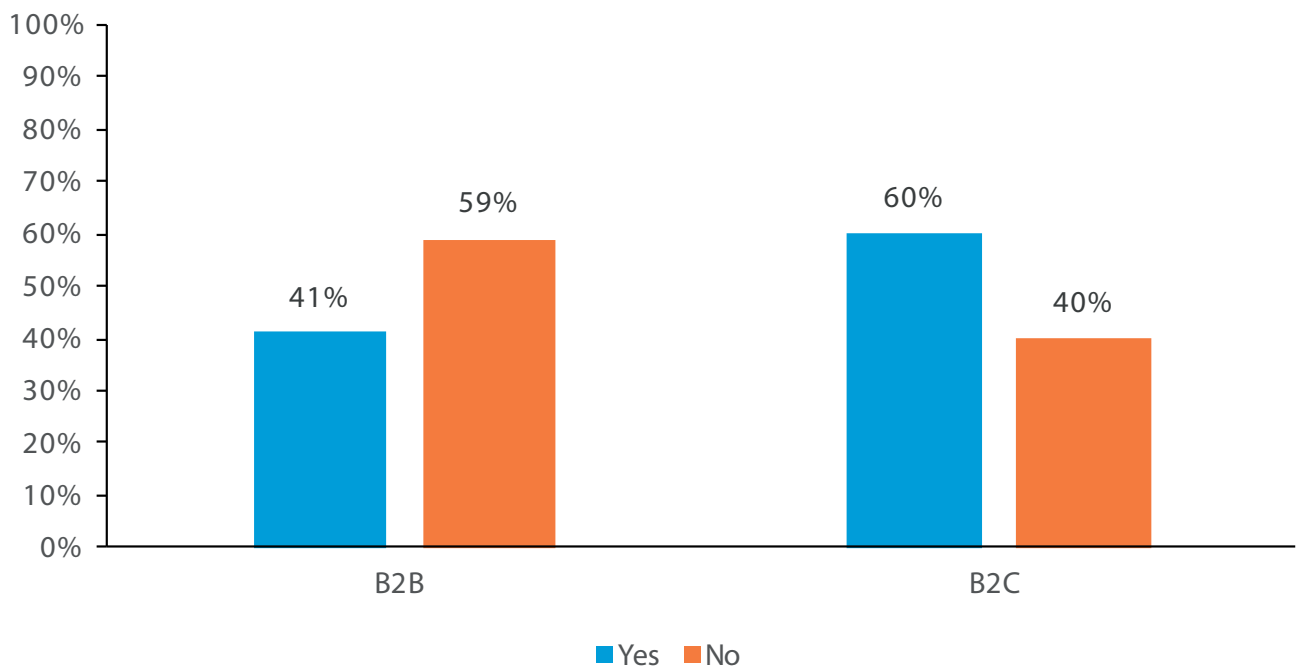
As described above, testing is a more accurate indicator of proficiency in email marketing than competency.

At the same time, the proportion of B2B marketers who say their email testing skills are advanced or intermediate is 27%, compared to 37% for B2C marketers.

B2C marketers clearly rate their targeting skills to be more advanced than their B2B cousins. More B2B marketers have more basic skills.

B2C marketers therefore report lower competence compared to B2B marketers overall, but more competence in testing. B2C marketers are 2.5 times more likely to conduct email testing than B2B marketers, despite the lack of competence reported.

Are you able to calculate the return generated from your email marketing activities?



When comparing returns on email marketing, there is another clear split.

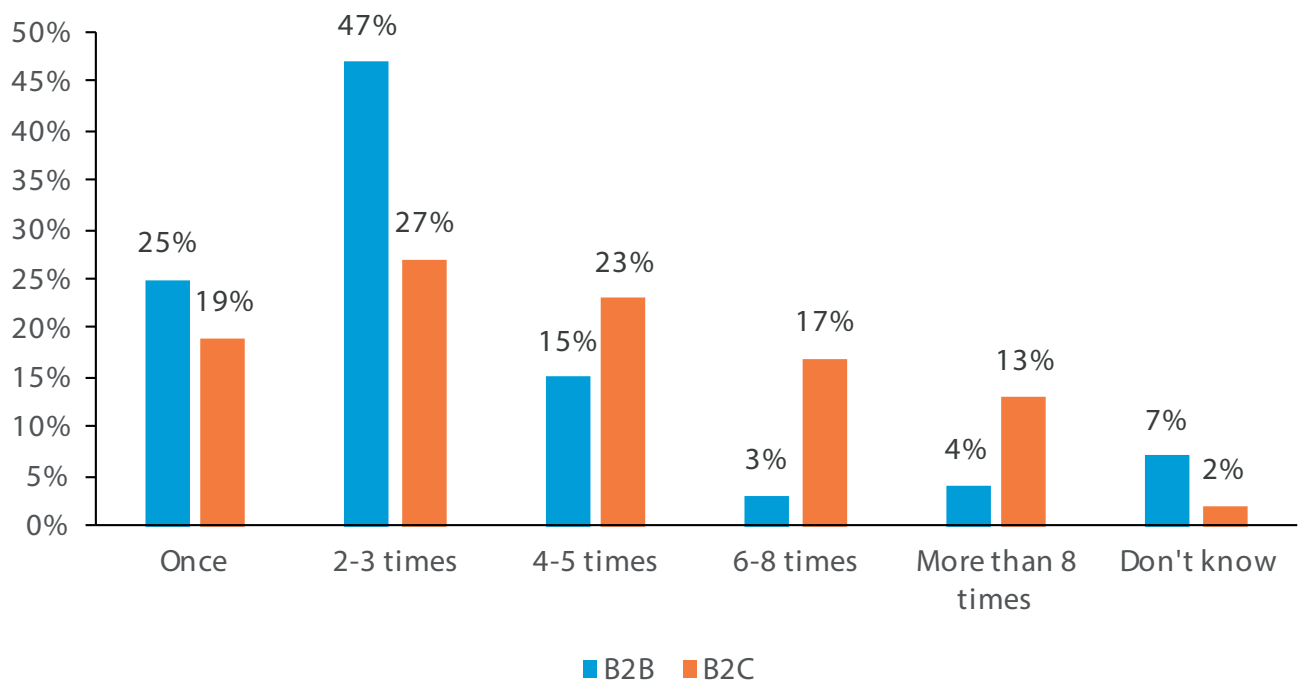
59% of B2B marketers say they cannot calculate ROI, while B2C marketers have the inverse response, 60% saying they can.

B2B marketers say their approaches are less complex, they are also less able to monitor results.

Could B2C marketers be more likely to be asked for ROI figures compares to their B2B cousins, and so endeavour to find it?

Again, there is a link between the competency of testing and overall ROI.

What is the maximum number of times you contact an email address in a month?



B2B marketers are likely to contact their targets less frequently than their B2C counterparts, with 72% contacting them one to three times in a month, dropping to 46% for B2C marketers.

Only 7% of B2B marketers contact their targets more than six times in a month compared to 30% of B2C marketers.



Methodology

The *Marketer email tracking report* is an initiative undertaken by the DMA's Email Marketing Council in conjunction/ collaboration with the Email Benchmarking Hub.

The research was conducted during December 2015 and January 2016 via a survey that was hosted online. It was promoted on the DMA home page and via various ESPs who supported the companion report. A link to the survey was added to a select number of DMA members' weekly newsletters, social networks and websites.

A wide range of both DMA members and non-members were surveyed. This sample included a cross section of company types and sizes. A wide range of UK geographical locations were also reached. The respondents also operated in a wide range of sectors. The data was collated and analysed by the DMA's Marketing and Insight department, who also wrote the report. The final report was produced in collaboration with the sponsor, dotmailer, and the DMA Email Benchmarking hub. The report was designed by the DMA's in house design team.

The survey consisted of 28 questions in total, which were a mixture of both qualitative and quantitative questions. These questions were reviewed by the DMA, dotmailer, and the DMA Email Benchmarking Hub to ensure they reflected the current market scenario. The survey had 123 respondents (75 B2B and 48 B2C). Respondents were incentivised to complete the survey by offer of the chance to win a £25 Amazon Voucher in a prize draw.

The findings were launched at an event on 16th February 2016. The report and infographic were hosted on the DMA website.



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

IMAGINATION...DELIVERED

About the DMA

A DMA membership will grow your business. Our network of more than 1,000 UK companies is privy to research, free legal advice, political lobbying and industry guidance. Our members connect at regular events that inspire creativity, innovation, responsible marketing and more. Most of them are free.

A DMA membership is a badge of accreditation. We give the industry best-practice guidelines, legal updates and a code that puts the customer at the heart. We represent a data-driven industry that's leading the business sector in creativity and innovation.

One-to-one-to-millions marketing attracts the brightest minds; individuals that will shape the future. By sharing our knowledge, together, we'll make it vibrant.

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