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Email tracking report

2014

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Introduction

Welcome to the *Email tracking report 2014* jointly commissioned by the DMA, *fast*.MAP and dbsdata. This is arguably the most valuable research the DMA conducts around the channel because it investigates real-world consumers' attitudes towards marketing email. The research looks to answer questions such as why consumers are more likely to give up personal data, why they are more or less likely to respond, and even how many email addresses the average consumer holds. For the marketer some very interesting insights can be drawn from the research, confirming and confounding in equal measure some of the current perceived 'wisdoms of email'.

Some of the highlights of the report for me were:

The upward trend, since 2010, of the time consumers spend on email at work and home (even though there has been a slight decline over the last year). This reinforces the continuing need for marketers to ensure content is relevant and therefore making consumers feel the time reviewing marketing emails is of real benefit to them. The need for increased relevance is supported by respondents who felt that, although emails were getting more relevant with an overall relevancy score of 36%, there is obviously still plenty of room for improvement.

Consumers' concerns around responsible use and security of personal data remain understandably high; trust in the brand in conjunction with clear and concise data policy being the most important factors for consumers in believing data will be handled responsibly.

The ever-increasing usage of smartphones has unsurprisingly seen its impact on email rise over the last year with, for example, 29% of respondents reading the subject line by phone, up from 19% last year. However, this trend must be tempered because, although people are now more likely to interact from mobile devices than before, the humble PC or laptop is still the primary channel for accessing email for between two-thirds and three-quarters of consumers.

In addition, the multi-screen world creates more complexity for the marketer given that consumers will switch channels if they read about something in an email which they want to purchase, with 40% of consumers waiting to do so until they are at their PC or laptop and 13% going into a store - just 5% are likely to buy directly from their phone. This all adds to the customer journey and attribution challenges for email marketers.

These are just a few of the insights drawn from the report which have hopefully whetted your appetite to delve into the research further and get a deeper understanding of consumers and their attitude to email.

Finally, a few words of thanks, to *fast*.MAP for the data collection, David Reed for his excellent report writing, Yashraj Jain from the DMA for project managing, the volunteers of the Email Council Benchmarking Hub in helping develop questions and interpret the data and, of course, dbsdata for their sponsorship without which we would not be able to produce this valuable report.

Happy reading.

Matt Simons
Managing Director, eMagineBlue
DMA Email Council

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dbsdata's perspective

Live long and prosper - the email way

Email addresses have long been a central part of the digital marketing toolkit. They provide a stepping stone at many different points in the customer journey - from distant prospect with just an inferred affinity through to loyal customer making repeat purchases and on to lapsed or dormant opportunity for win-back. As such, their value is clearly significant and capturing email is central to many brands' activities.

When it comes to viewing email addresses as a valuable piece of data, a more casual attitude has sometimes been evident. Email can appear to be transient and as a result be treated almost as a throwaway item that can always be renewed or recovered by other means. The reverse is also often seen - email addresses held and used for many years after their initial purpose in the journey has been served.

What this wave of research shows beyond any doubt is that data-driven marketers in all channels need to pay close attention to the email addresses they capture, nurturing them with care and ensuring they are used with respect, relevance and as a resource which is not simply renewable. If you are fortunate to be trusted with an email address and have permission to market to it, this should be seen as the start of a long-term relationship, rather than just a rush towards short-term sales.

Take the longevity of email addresses - 81% of consumers have used the same one for more than five years. That is a surprisingly high level of stability in a channel that is often thought of as dynamic and short-lived. The good news is that stable email addresses mean you can communicate with an individual across their lifetime with the brand. But you also need to maintain that permission, perhaps by refreshing or re-acquiring it at key points, rather than assuming it remains valid forever.

A second benefit of this durability is that email addresses can form the critical match point between disparate data sets. Ensuring you recognise an existing customer in a file of prospect data, for example, will avoid the risk of upsetting an individual by offering different terms or prices to the ones they already bought at. Equally, additional variables can be used to enhance a file if you are able to identify where identical records exist across data sets via shared email addresses.

At dbsdata, we understand the value and importance of email as a channel and of the email address as a data item. That is why we are pleased to support the DMA's research programme in the belief that it will help marketers to understand this asset better and use it more effectively. We hope you enjoy reading the report.

Adam Williams
Managing Director
dbsdata

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fast.MAP's perspective

This year's *Email tracking report* illustrates how complex email marketing has become in the relatively short period since its rapid adoption almost a decade and a half ago.

Originally, email was embraced by marketers because it was relatively cheap yet achieved high response rates. There was little understanding of the science of email engagement and, to succeed practitioners took a bold, unsophisticated approach.

It's different now. Inbox competition is intense and the medium has become much more demanding. To differentiate and succeed, requires such a wide range of skills and knowledge that extended teams of experts are involved.

These include planners who can identify the different objectives, which range from brand building to sales generation; technical industry experts who, to maximise deliveries, have the very latest knowledge of the suppression and processing strategies of email distribution companies and inbox management companies and an appreciation of distinct consumer types, how they engage with email and how email fits into a typical purchase cycle. And once all that has been done, the dark arts of creativity, testing, open rates, click-through and real-time statistics must be harnessed.

Companies which strive for continual improvement and deploy a breadth of expertise will reap rewards. Email is unique - a well-established direct marketing medium in which technical innovation is burgeoning and constant - although email marketers can never rest on their laurels, they are guaranteed plenty of excitement.

David Cole
MD of online research company fast.MAP
David.Cole@fastMAP.com
www.fastMAP.com
@fastMAP

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Executive summary

Consumers spend an average of 2.01 hours per day looking at email at home and 0.95 hours per day at work. Once consumers with no email access at work are removed, that average rises to 1.7 hours.

Email has grown its share of attention at home with consumers now spending an extra 15 minutes per day on it, up from 104 minutes in 2010. The trend continues upward, despite all of the competition for time from other channels, perhaps supported by the use of multiple devices for accessing email (smartphone, tablet, PC, laptop).

The average number of email addresses used by consumers is now 2.4, with a big increase in those who have three (up to 23% from 19% last year). Yet email addresses remain stable - 81% have had their address for five years or more. That means email addresses provide an important data matching point for marketers.

While around a third of consumers (35%) have an email address which they give out to marketers, an almost equal number (34%) have just one address for everything. Even those with multiple addresses tend to use just one or two actively (22%), indicating fewer problems with getting marketing messages seen than may be assumed. A strong proof of this is that 35% of consumers who have more than five email address say they use one main address for everything.

A majority of consumers (53%) get a high volume of email (more than 21 marketing messages each week) and one-third (34%) are in the super-heavy category, getting over 41 emails weekly - that equates to more than 2,000 each year. Overall, consumers get an average of 24.7 emails from trusted brands each week.

As an opt-in channel, email has to get the consumer's permission - the average consumer gives this to 11.5 brands. However, 52% have signed up to receive email from fewer than 10, while 11% have opted-in to more than 31 brands.

Relevance of email to consumers is gradually improving with a mean score of 36.351. Although 100% relevance is an impossibility, this still indicates there is room for improvement.

Brands need to demonstrate that they will handle personal data responsibly. The strongest indicators of this are existing trust in the brand (26%) and a clear data protection policy (25%).

Consumers sign up for email if they like the brand (36%), because they are a regular customer (35%) or they trust the company (35%). But money-off discounts (38%) and free samples or gifts (35%) are just as persuasive, as are free delivery and percentage discounts (33% each).

Emails which contain free offers and discounts are, not surprisingly, the most welcome in the inbox as a result. But user-generated content is rated very low at just 3% of consumers expressing a preference for this kind of message.

Creative triggers get attention, especially interesting subject lines (mentioned by 57% of consumers), with actionable clear links in second place (38%). Long copy and social media buttons have a very limited impact (5% and 4% respectively).

Click-through from emails are declining, down to 48% from 64% three years ago. However, indirect actions are rising - 35% of consumers will visit the brand's website as a result of getting their email, but via a different route, and 30% will visit a store.

Email also has a shelf-life of 10 days on average, but this has fallen from 19.6 days in 2011, most likely as a result of consumers managing their email via smartphones and tablets and choosing to act or delete immediately. Significantly, 34% of consumers keep emails for a week, perhaps as a reference point for considered or planned purchases.

Marking email as spam when it comes from a trusted brand is usually the result of not recognising the sender (49%), receiving too many messages (36%) or not remembering having signed-up (35%). Two of those suggest marketers could do more to reflect when and where an individual chose to opt-in (or may reflect deeper data protection issues).

1. Consumers were asked what proportion of emails were interesting and relevant to them in ten percentage bands. Multiplying the mid-point of each decile by the number of consumers giving that score generated the overall mean.

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Filtering of email by ISPs may appear to be a customer service, but one in five consumers seek out brand emails from their spam box more than once a week and 16% do so once a week.

Email is being increasingly accessed by smartphone (29% read the subject line by phone, up from 19% last year) and tablet (12% read the subject line on this device, up from 6% last year). They are also now more likely to open, delete, and keep emails on these devices than before. But the PC or laptop is still the primary channel for accessing email for between two-thirds and three-quarters of consumers.

Multi-device consumers also switch channels if they read about something in an email which they want to purchase - 40% wait to do so until they are at their PC or laptop. On top of this, 13% will go into a store. Just 5% buy directly from their phone, showing it has yet to become the primary channel for purchasing and also making effectiveness tracking and attribution a major challenge for email marketers.

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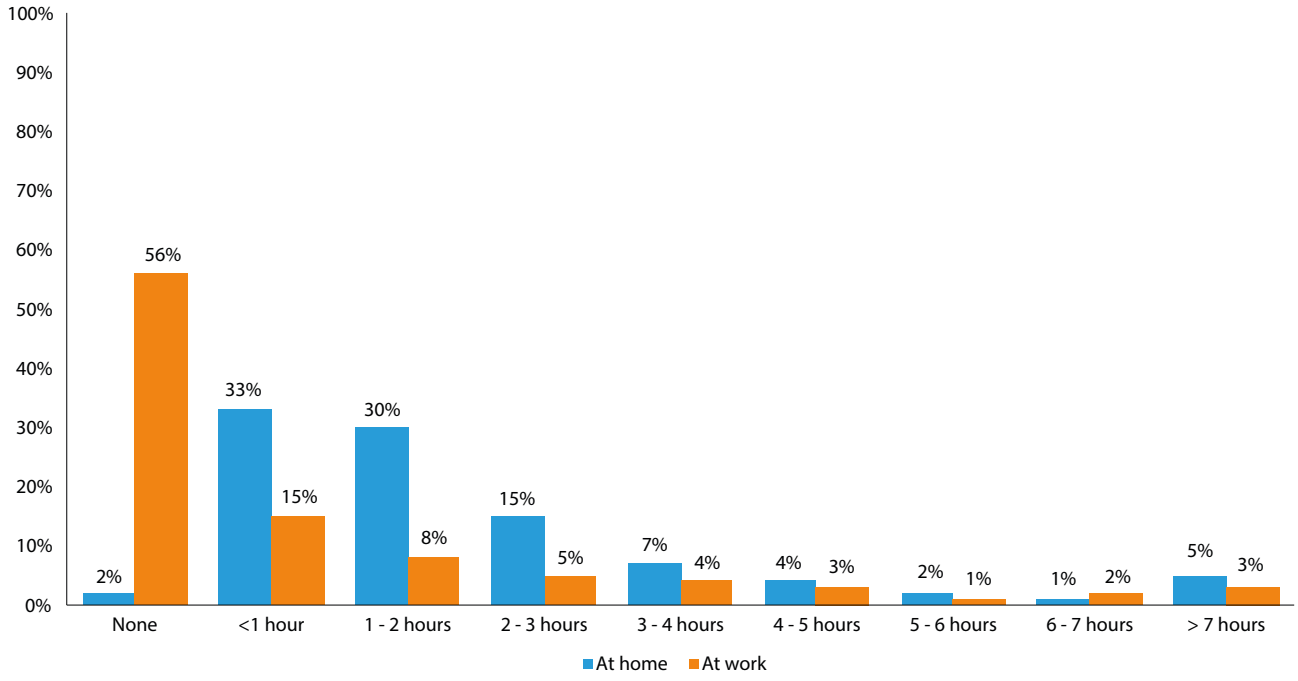
1. How consumers manage their inbox

1.1 Time spent on email



Email has become a fixture for consumers at home, with 98% spending at least some time every day reading the contents of their inbox. Three clear segments exist:

- 33% are ***casual users*** of email and spend less than an hour per day on it
- 30% are ***moderate users*** for between one and two hours
- 34% are ***heavy users***, with email taking up more than two hours

Notably, one in 20 consumers claim to be ***super-heavy users*** who spend more than seven hours each day looking at email.

At work, the picture is somewhat different - a majority of consumers (56%) have jobs where email does not play a part. Among those who do use it, four groups can be identified:

- ***casual users*** who spend less than an hour using it (15%)
- ***light users*** who spend less than a third of their working day, or between 1 and 3 hours, with email (13%)
- ***medium users*** for whom email takes up nearly half their time, or between 3 and 6 hours (8%)
- ***heavy users*** who spend virtually the entire working day (over 6 hours) on email (5%)

On average, consumers spend 2.01 hours per day using email at home and 0.95 hours at work. If those who do not access email at all are removed, the home average rises slightly (to 2.06 hours), but the work average jumps dramatically to 1.7 hours. Equally, if heavy users are also removed, the home average falls to 1.63 hours and the work average becomes 1.45 hours.

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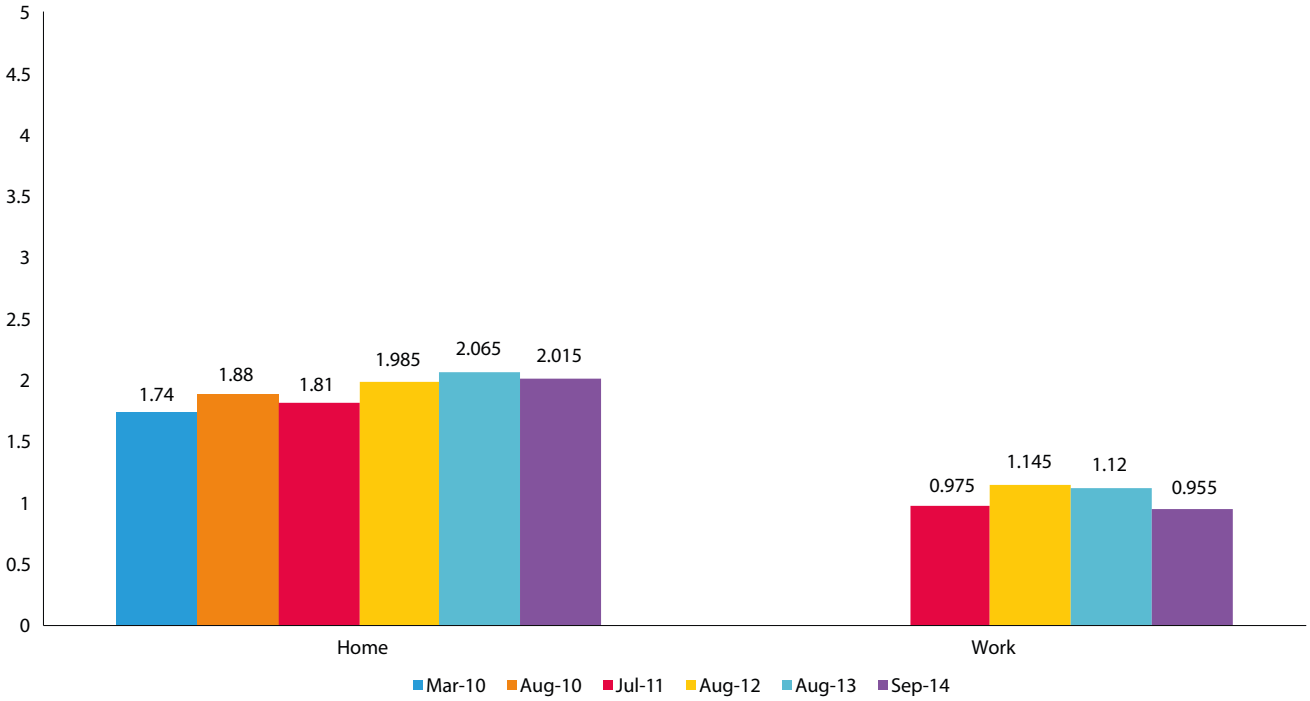
1.2 Trends in time spent on email



Email not only retains its place in the domestic life of the consumer, but has also seen a gentle upwards trend in the amount of time it is used over the last four years. Compared to March 2010, the consumer now gives an extra quarter of an hour's attention to email, a figure only marginally down on the level seen last year.

The continued adoption of tablets, alongside smartphones, is clearly helping to retain email's place in the media landscape, not least because most households have retained their PC and/or laptop in addition to mobile devices. This proliferation of access channels is clearly off-setting any dilution of involvement with email which might have been expected to result from instant messaging and social network messaging.

At work, by contrast, email remains relatively stable (or seeing a very moderate decline). Again, use of multiple devices in working life is keeping email in use as a way of connecting colleagues wherever they are located, rather than fuelling any substitution by newer, collaborative working tools.

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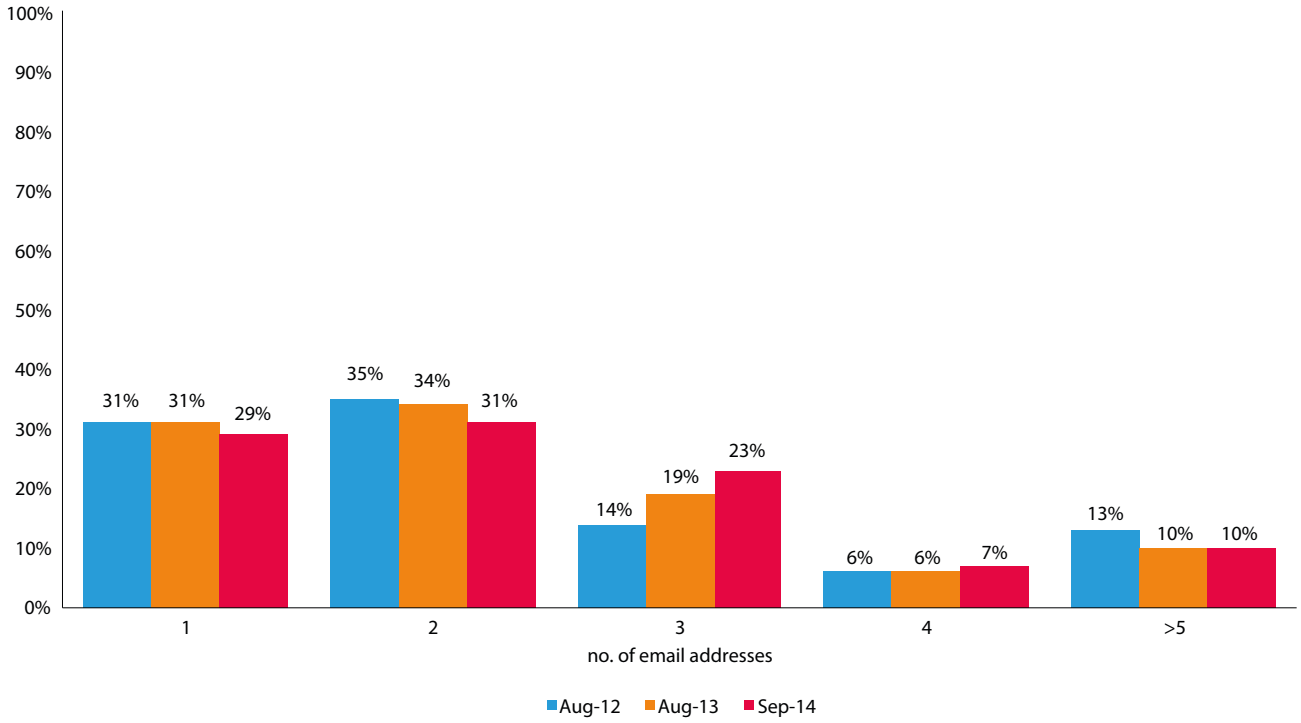
1.3 Trends in number of email addresses used



Email addresses can easily proliferate with the inclusion of a new address as part of the proposition made by a range of service providers (Google, Facebook, ISPs, mobile networks, digital TV providers, etc). As a general trend, it is clear that consumers are steadily accumulating more addresses.

While the mean number of addresses per respondent in September 2014 was 2.4, only slightly up on the August 2012 mean of 2.3, there has been much stronger growth in the number of consumers having three addresses - up to 23% from 14% in the same period. 40% of consumers now have three or more addresses in use.

What should not be overlooked is that there is a stable segment of around three in 10 consumers who still use just one email address. Since heavier users with four, five or more addresses have not significantly grown in number, the main shift can be seen in this middle ground of taking on a third email address. It may be that the extra time involved in checking multiple accounts is what is driving the rise in time spent on email at home.

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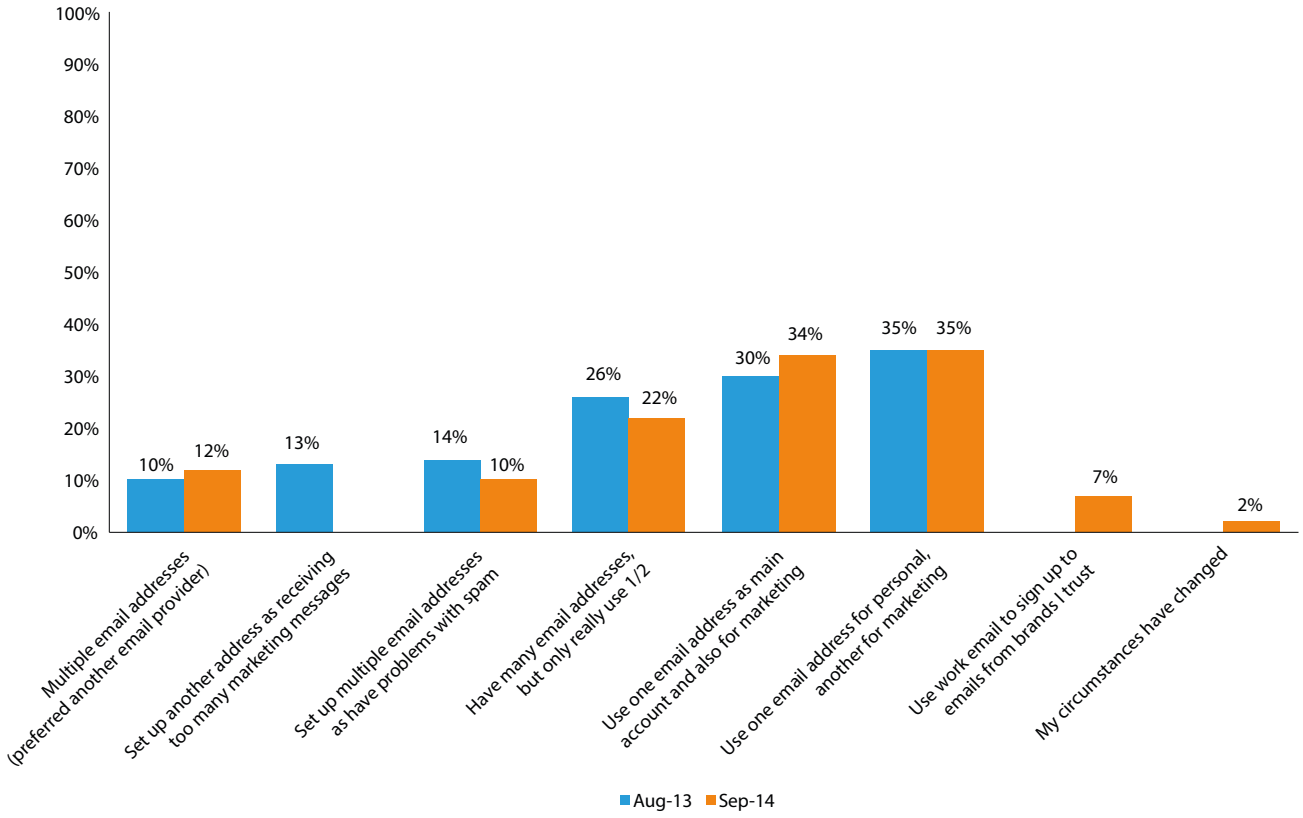
1.4 How different email addresses are used



It would be easy to assume that consumers create multiple email addresses in order to filter the type of messages they receive. Providing a secondary or tertiary address that is never checked has been identified as a behaviour by previous research. According to this survey, 35% of consumers actively do just that, maintaining separate addresses for personal and marketing purposes. Yet only one in 10 say they do this because of a problem with spam and this number has fallen by 4% in one year.

By contrast, an almost equal number (34%) use a single email address for all purposes - and this is a higher proportion than found previously. This "golden record" is clearly of significant value for marketers as access to this email virtually guarantees that email messages get seen. Understanding when the email address provided fits into this category could be the most worthwhile data profiling exercise any digital marketer undertakes. Similarly, 7% of consumers use a work email address to opt-in to email from trusted brands - this also enhances the likelihood of opening and should be carefully identified.

As might be expected from the growing use of multiple emails, there is a parallel decline in the number of consumers who say they only make use of just one or two of their addresses. For 12% of consumers, the growing number of email addresses they have is simply a function of moving from one service provider to another (and perhaps experiencing difficulties in deleting or closing inactive accounts).

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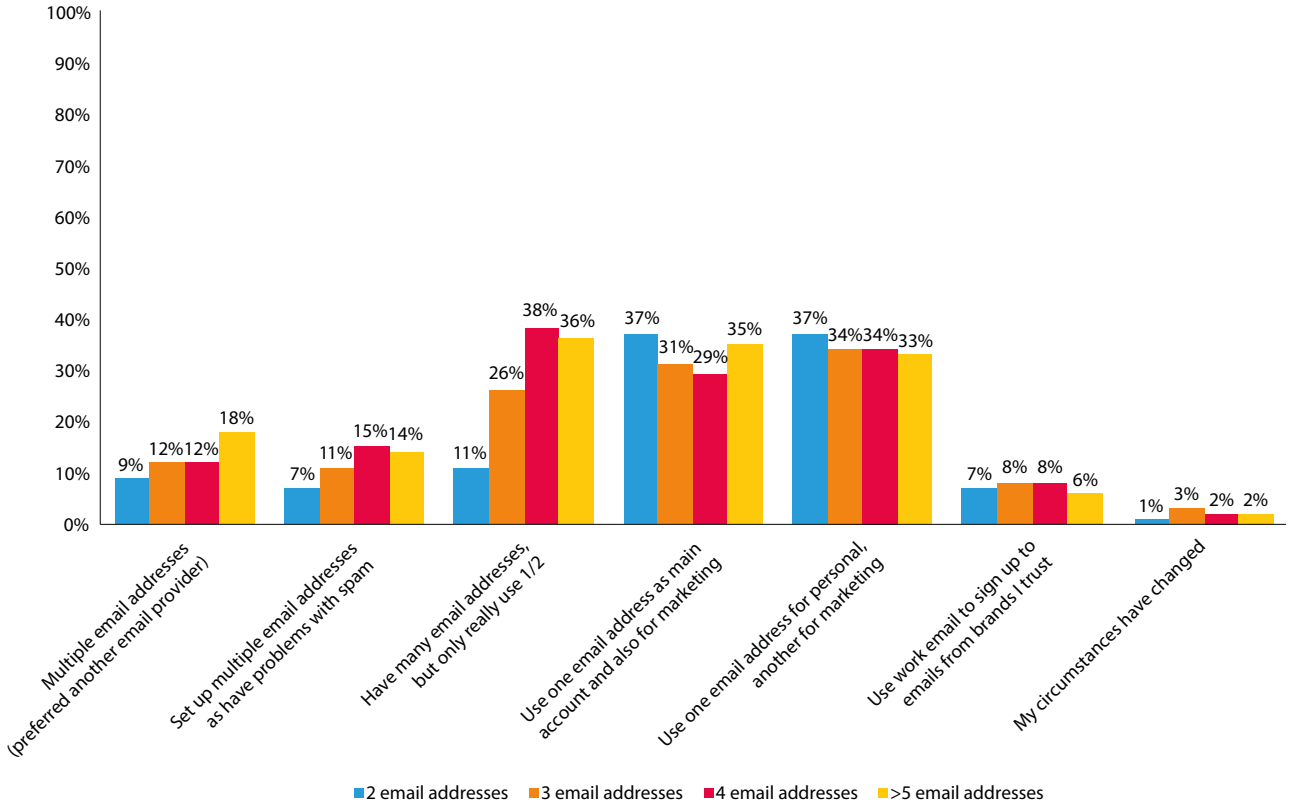
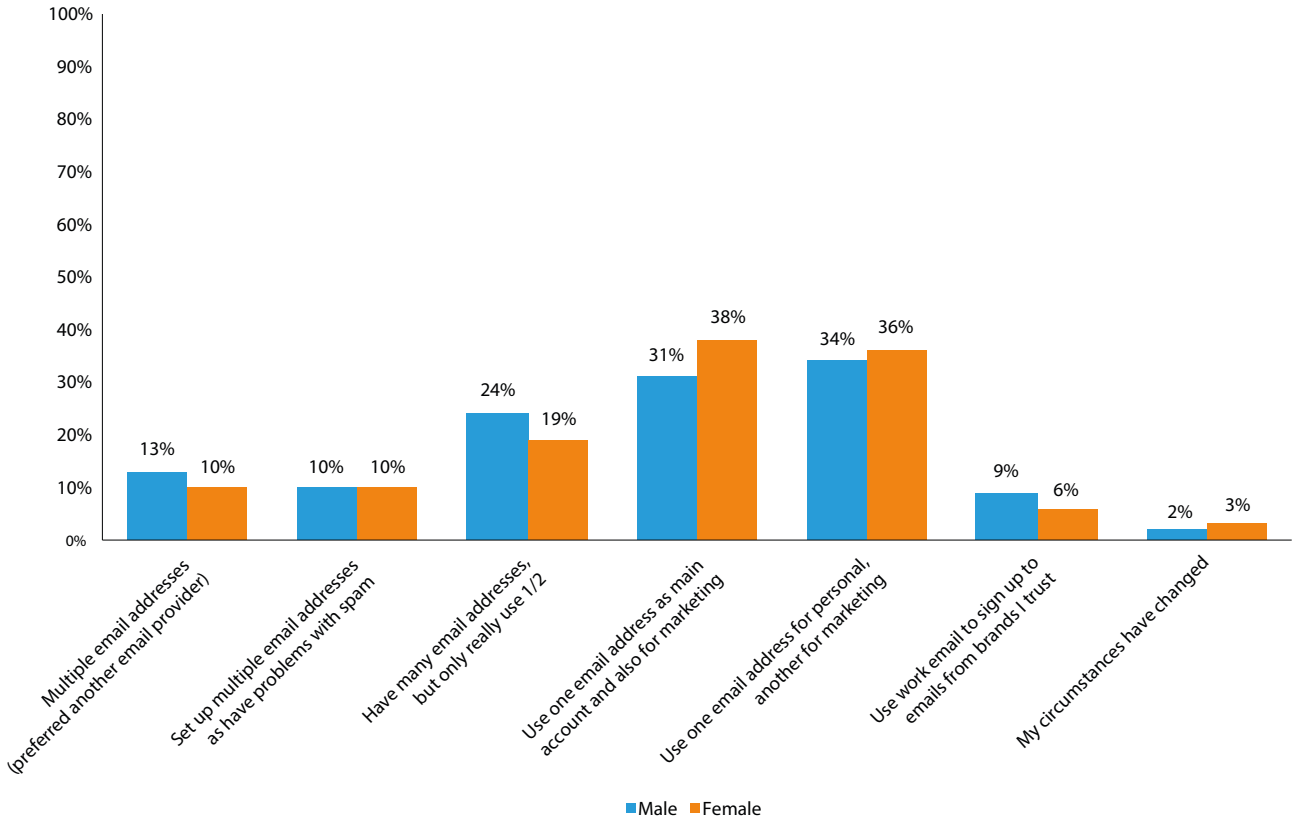
1.5 How different email addresses are used by profile





While the average number of email addresses used by consumers may be rising, the way multiple email addresses get used is - for one segment at least - fixed. One-third of consumers have a personal email address and another they give out to brands - a behaviour which is consistent across men, women and multiple email address users in this group.

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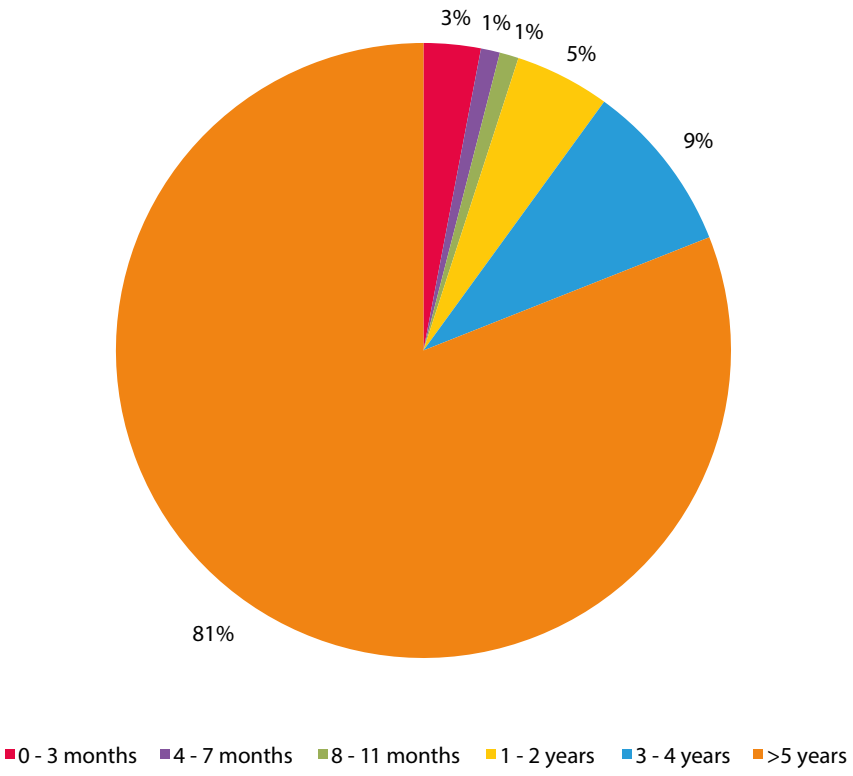
But there are significant differences in the type of person who will use just one email address for all purposes - women are the most likely to maintain this type of unified email identity (at 38%, compared to 31% of men). So, too, are consumers with over five email addresses - 35% claim to prioritise just one of them, suggesting a desire to simplify their complex inbox.

Similarly, consumers with the most email addresses are also the most likely to say they use just one or two. Men are more likely to concentrate on a core couple of addresses than women (24% v 19%). Men are also more likely to use a work email address for marketing emails than women (9% v 6%).

Significantly, the reason why consumers end up with multiple email addresses is more likely to be through changing email provider than as an attempt to filter out spam.

1.6 How long email addresses remain in use



Email addresses have long been treated with a degree of suspicion by digital marketers. While they are a vital piece of contact data (and often provide the best way to link different records), they have been thought of as having a short shelf-life and therefore as relatively transient.

Yet this does not appear to be the case since 81% of consumers say they retain their email addresses for five years or more. This should be considered in the light of the fact that average household tenure (for all types) is around eight years, according to the Department for Communities and Local Government.

If email address as a data item has longevity, this needs to be treated with care in the light of the Information Commissioner's Office using six months as a benchmark for the shelf-life of permission. Likewise, in the *DMA Customer acquisition barometer 2014* study, 49% of consumers said a company should ask for their permission to be contacted every six months. If re-permissioning becomes a legal requirement under the proposed Data Protection Regulation, at least digital marketers are likely to possess a valid email address by which to acquire it.

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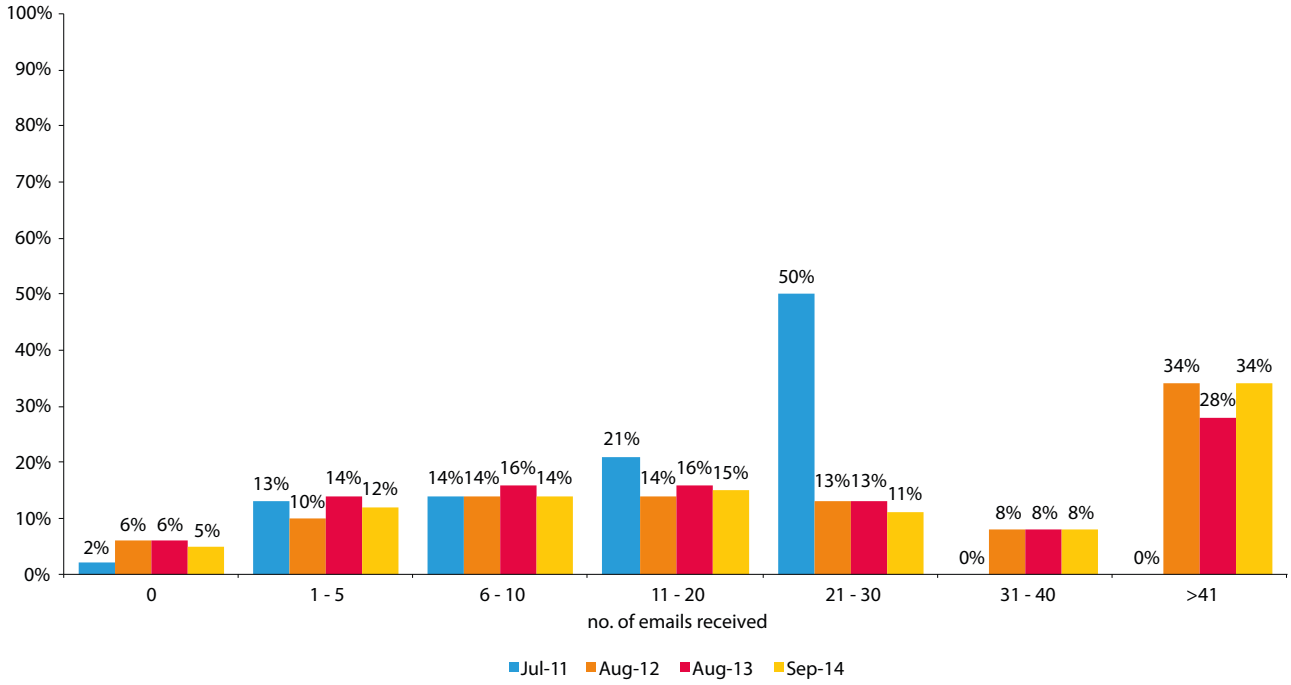
2. Relevance and engagement

2.1 Volume of email received weekly from trusted brands



The weight of email received each week by consumers differs significantly across three groups. Excepting the one in 20 who claim to receive no emails at all, these are:

Low volume - 12% of consumers are getting less than one email per day from the brands they trust. Although this number has varied between different waves of this study, it is relatively stable. Since email is an opt-in medium, it is likely these individuals have not given their email address to many companies.

Moderate volume - 29% of consumers get roughly one or two emails each day. Although in July 2011, a higher proportion (35%) of consumers said they got either six to 10 or 11 to 20 emails each week, the size of this segment now seems settled.

High volume - the majority of consumers - 53% - say they get more than three emails each day, or over 21 every week. (In 2011, the highest band was set at 21 or more emails - subsequent surveys allowed for additional, higher levels of receipt.) It is notable that fully one-third of consumers sit in the super-heavy category of 41 emails each week. That would mean more than 2,000 emails delivered to their inboxes each year - a considerable degree of clutter, but one which they must have signed-up to.

Overall, the average volume of email has reached a plateau since economic recovery has begun. While in 2011, consumers got an average of 9.4 emails each week, this rose to 25.2 in 2012, fell back to 22.6 in 2013 and was 24.7 in 2014.

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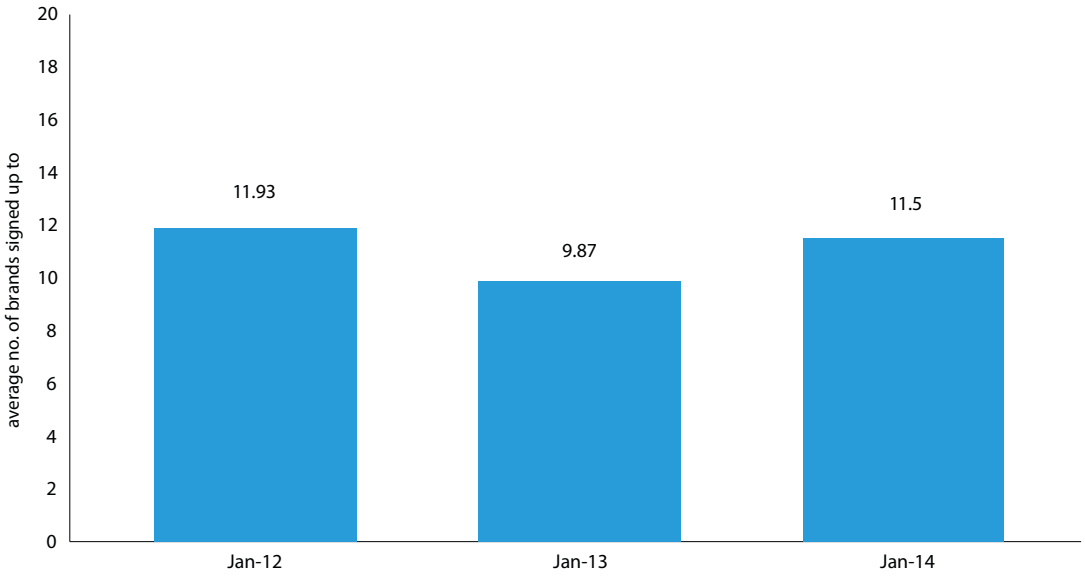
2.2 Number of brands signed up to receive email from

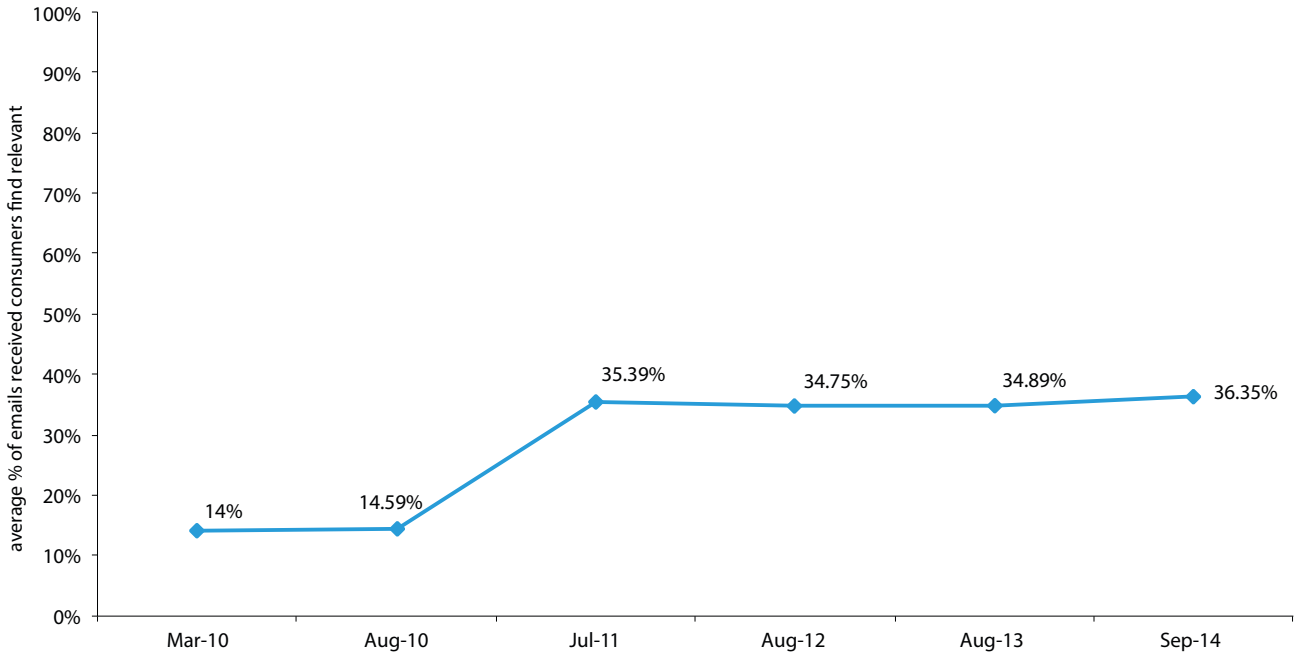


For email marketing to happen, consumers have to opt-in by providing both their email address and permission to be sent messages. Nine out of 10 consumers are happy to do just that, with only one in 10 saying they have not signed up to get emails from any brands.

On average, consumers give their email address to 11.5 brands - up from last year and close to the level seen two years ago. Within this group, 11% are ***super-heavy users*** who have signed up with over 31 different brands. Given the 34% of consumers who are super-heavy receivers of email, this suggests that many opted-in email programmes operate at high levels of contact frequency.

The majority of consumers (52%) have signed up to a below-average number of brands, giving their email address to fewer than 10. That could indicate that it is hard to get this group to sign up to email marketing, or equally it might just be a set of consumers who buy or interact with a small group of selected brands.

2.3 Trends in email relevance scores



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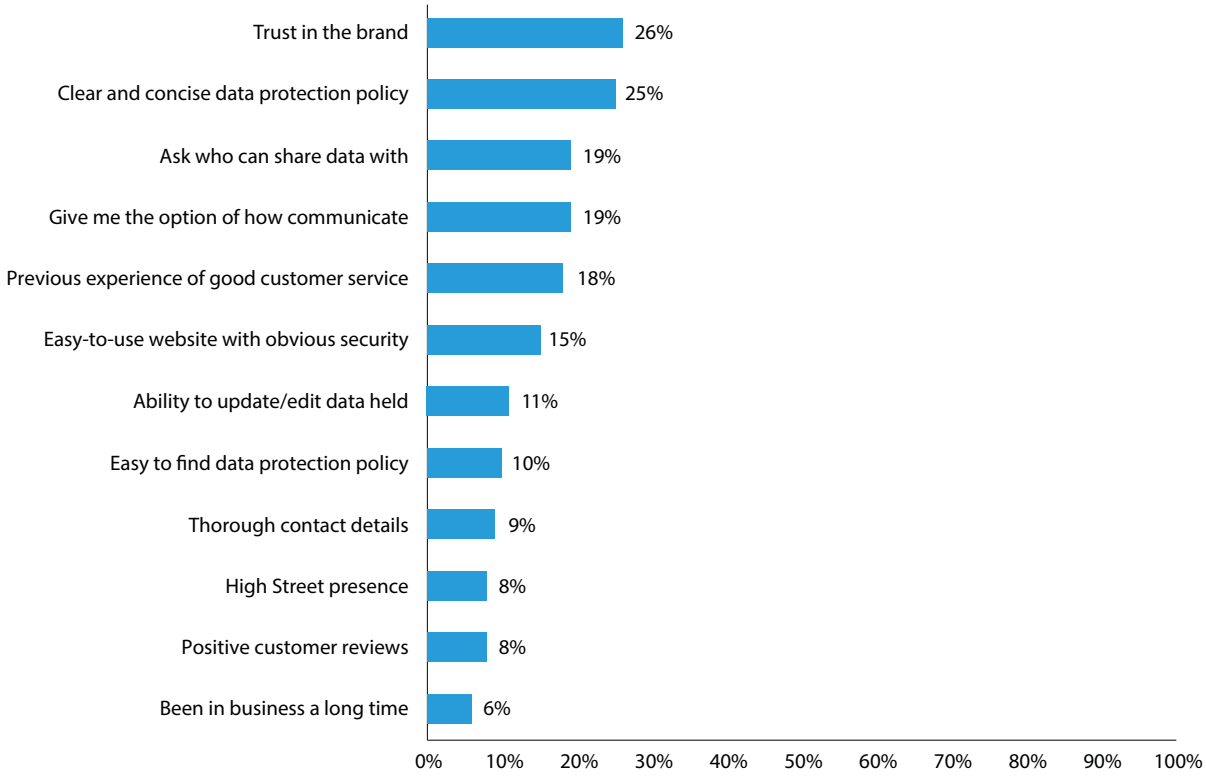
Consumers were asked to score the emails they receive from trusted brands for interest and relevance. By taking the mid-points of these deciles and the proportion of consumers rating them in each band, a relevance score has been calculated for each year of the *Email tracking report*.

What this clearly reveals is the extent to which consumers had hit the off switch during the recession, with email struggling to gain any traction during 2010. This is hardly surprising at a time when consumers were not actively seeking new products and services. Once a more normal climate returned in mid-2011, however, email saw a leap in its relevance. This has been further reinforced by the adoption of more sophisticated email systems which generate dynamic content and similar marketing techniques that drive uplift.

While an overall relevance score of 36.35 out of a possible 100 may be moderately respectable, the underlying rankings show how much headroom still exists for email marketers to improve their performance. For one quarter of consumers (23%) just one to 10% of the emails in their inbox were considered interesting and relevant in 2014, with a further 26% rating 11% to 30% positively. 23% gave the thumbs up to 31% to 50% of messages. With 2% dismissing all messages, this means that 73% of consumers find more than half of the email they get lacks relevance.

2.4 What convinces consumers a brand will handle their data responsibly?



For email marketing to happen, brands first need to win an opt-in from the consumer. In that moment of the data exchange, individuals may have concerns about what will happen to their personal information and whether the company will handle it responsibly. It is clear that a range of factors come into play to provide that reassurance:

Trust - the dominant requirement for consumers is their trust in the brand, as mentioned by 26%. This gets built by a range of factors, from the product itself, through marketing and by other influences - a positive customer experience, as mentioned by 18%, for example. Social influences are much lower than marketers might expect, however, with only 8% naming customer reviews, the same proportion as mention a high street presence.

Hygiene - brands need to show consumers that they are doing the right things about data protection in a very direct and obvious manner. This includes having a clear and concise data protection policy (at 25%, the second highest rating), having obvious security features on an easy-to-use website (15%) and ensuring the data protection policy is easy to find (10%), together with full contact details (9%). Taken together, this group of factors is actually the most important.

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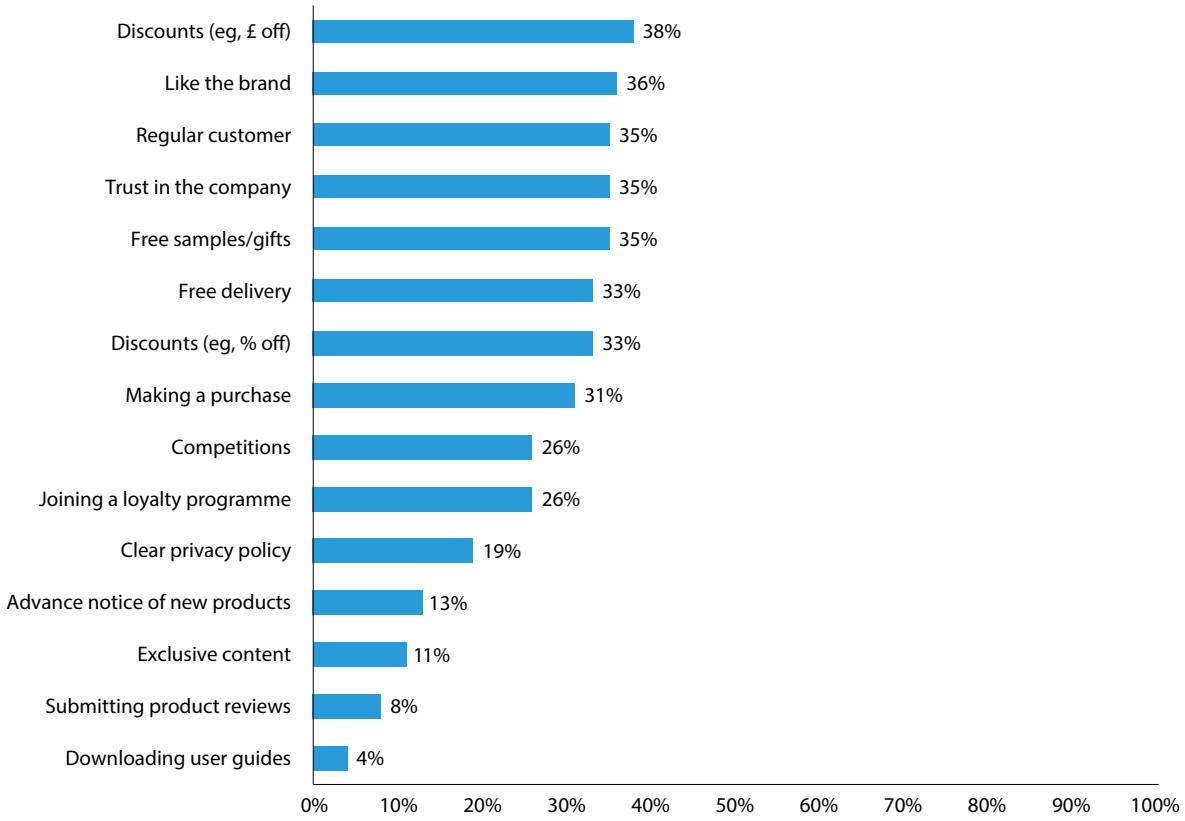
Choice - while choice is a by-word in marketing, it also comes into play during data collection. Nearly one in five consumers (19%) want to be asked who the brand can share their personal data with and the same number want options about how the brand will communicate with them. This suggests that data strategies need to become more flexible in order to win over wary consumers.

Control - it is notable that 11% of consumers want the ability to update or edit the personal information which is held on them. This right is enshrined in existing data protection law, but has been clumsy to exercise - online access and controls are clearly perceived as more persuasive that the brand is acting responsibly.

2.5 Reasons to sign up for email



Brands need to persuade consumers to opt-in to their email marketing programmes. There are a number of different ways to do this which have differing levels of impact:

Trust - just as with handling data responsibly, liking the brand (36%) and trusting the brand (35%) are in the top rank. Expressions of how that trust will be respected, such as a clear privacy policy, play a secondary role (19%).

Financial benefits - consumers are strongly persuaded by direct financial benefits, showing a very literal sense of a value exchange at play. Money-off discounts are the most-named reason to sign up for email (38%), with percentage discounts close behind (33%). Free product (35%) and free delivery (33%) show that consumers are looking for a good deal in return for their marketing permission.

Loyalty - Being a regular customer is among the top three reasons to subscribe (35%), although the specific action of joining a loyalty programme is only a second-rank motivator (26%). Consumers have a clearer recognition that they need to provide an email address when making a purchase (31%).

Marketing benefits - consumers are far less interested in non-financial benefits than marketers generally believe, with enhanced service the strongest persuaders of this sort, but still only at 13% for advanced notice of new products and 11% for exclusive content. Weaker yet is registering in order to submit product reviews (8%) or to download user guides (4%).

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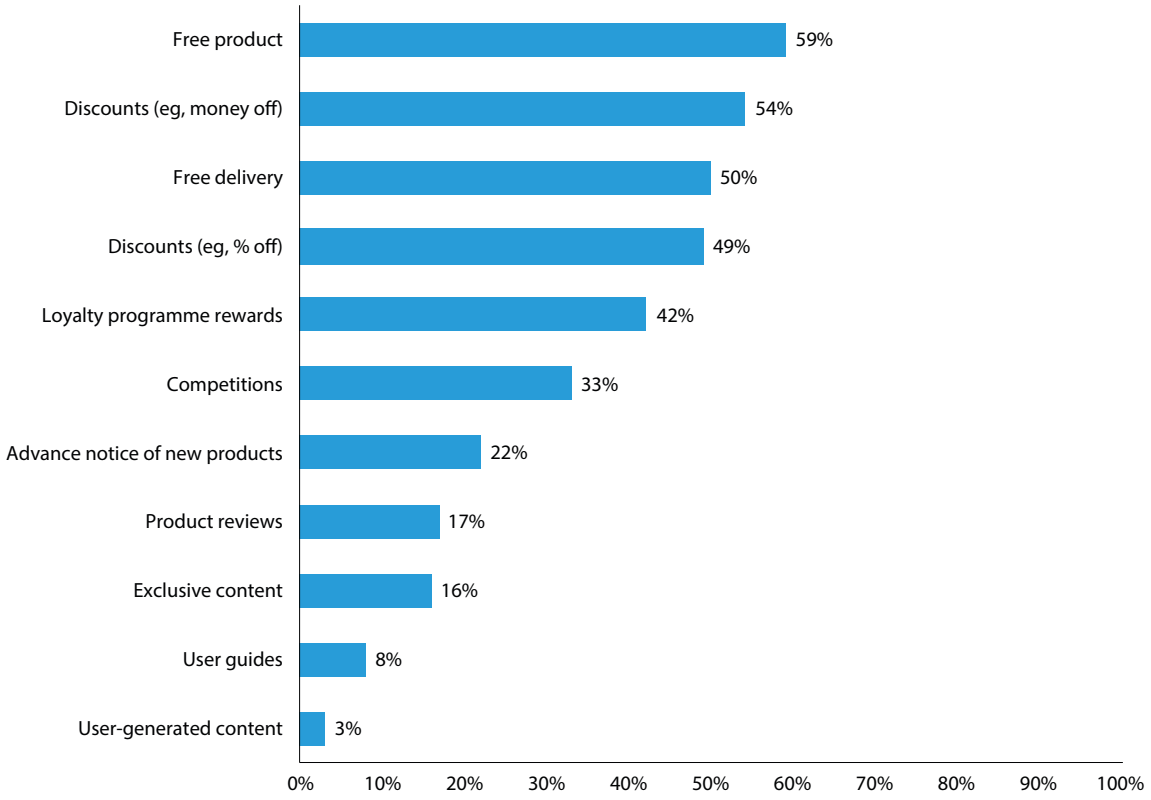
2.6 Offers and content consumers prefer to receive best



If marketers want to improve the relevance score of their email, the results show there is a simple way to do it - align its content with what consumers prefer to receive. While brands will always have messages and information which they need to communicate at specific times, such as new product releases, there are very strong content categories that grab attention:

Free - long recognised as a "magic word" in marketing, the lure of free product (59%) and free delivery (50%) are in the top three offers that consumers welcome.

Discount - straightforward money-off discounts with a clear cash value are the second most welcome type of content (54%), with nearly half (49%) happy to get percentage discounts, even if they have to work out the saving for themselves.

Reward - a loyalty scheme which builds up rewards for its members gets a positive welcome from 42% of consumers. Indeed, these programmes can become something which they look forward to receiving and are a trigger of repurchasing and upselling.

It should be noted that offers and content which have been seen as interesting by marketers, such as product reviews and user-generated content, are at the bottom of the relevance hierarchy. For any marketer or creative, the message is clear - think like the consumer.

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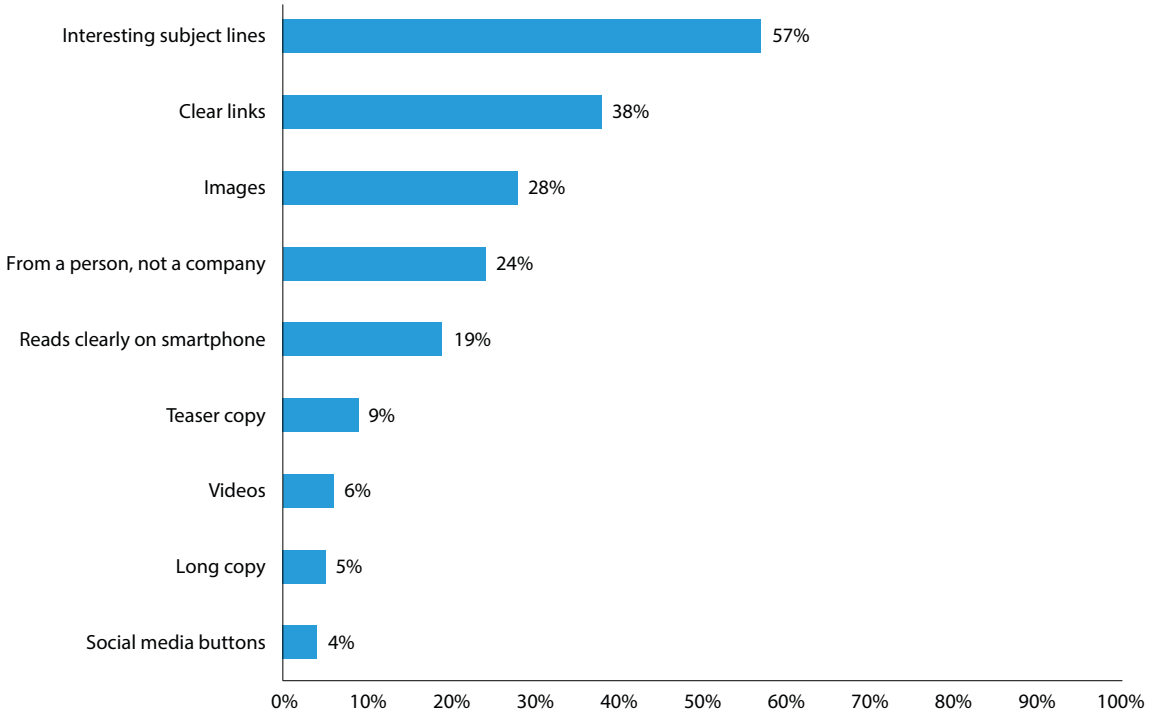
2.7 Creative features that are likely to engage



Consumers have a clear idea about that makes for an engaging email - and in many respects, it is simpler than what marketers typically focus on.

Immediacy - there is an overwhelming preference for interesting subject lines (57%). Especially for consumers who get over 2,000 emails each year, being able to grasp quickly what the message is about matters.

Actionable - nearly four out of 10 consumers (38%) see email as the starting point for a marketing journey, identifying clear links as more likely to engage them. Having a clear call to action will obviously pay dividends with this group.

Visual - images are more engaging for 28% of consumers, but only 6% mentioned videos. While this may have a correlation with download speeds and data limits, there is also a time issue - email is thought of as short-and-sweet. Emails also need to render clearly on smartphones.

Human - the most effective marketing technique which is welcomed by consumers - is the use of an individual sender, rather than a corporate identity. One quarter of consumers say this is more likely to engage them. Brands have recognised that having a human face makes them appear more authentic and brings a human touch to engagement in virtual channels (although it is worth bearing in mind the risks in this strategy, since 49% of consumers will mark an email as junk if they do not recognise the sender).

Paradoxically, consumers do not engage strongly with text in email - just 9% like short, teaser copy and only 5% prefer long body text. Social links, which have been extremely focused on by marketers in recent years, are bottom of the list for engagement - effective for some consumers, but perhaps only a limited segment.

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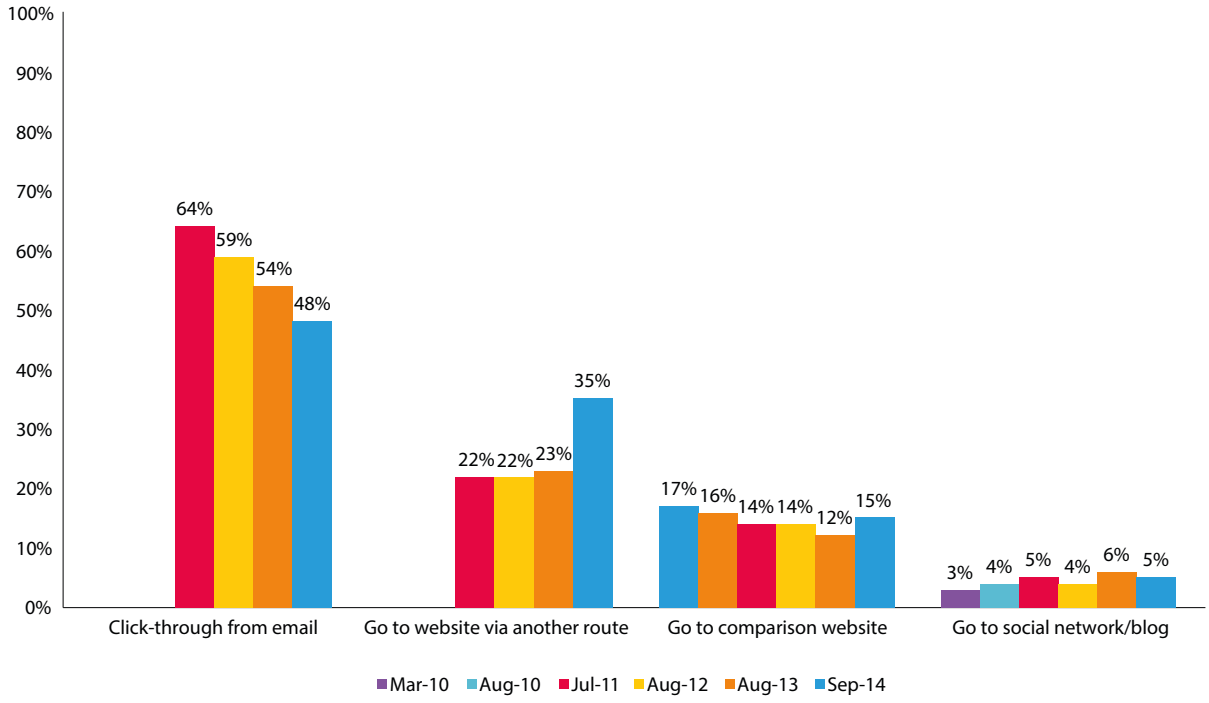
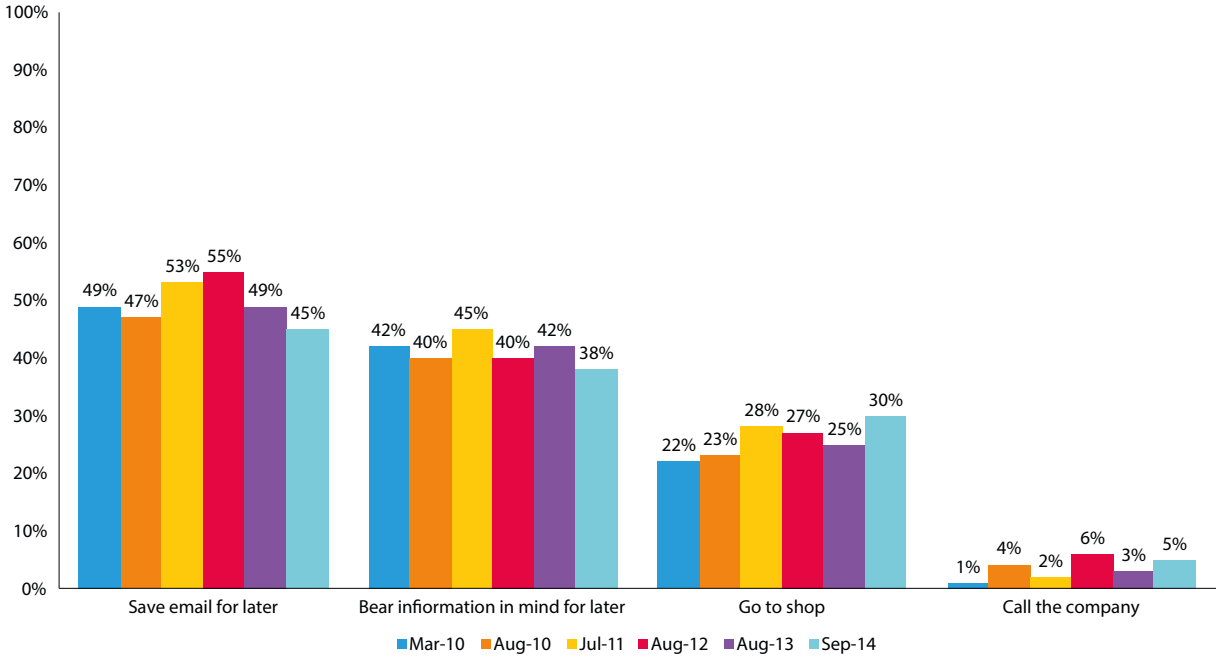
3. Engagement and action

3.1 Actions taken when receiving an interesting email





Relevance has a purpose - to drive the consumer towards the brand, whether its website, retail outlet or call centre. Interesting and relevant content is not an end in itself, but rather a tool to drive response. Measuring that response via click-through from emails has always been a strongpoint for email that allows its effectiveness to be measured.

Just under half of consumers (48%) now say they will click-through from an interesting email, compared to 64% three years ago. Using standard reporting and metrics, that would make email appear to be losing its effectiveness.

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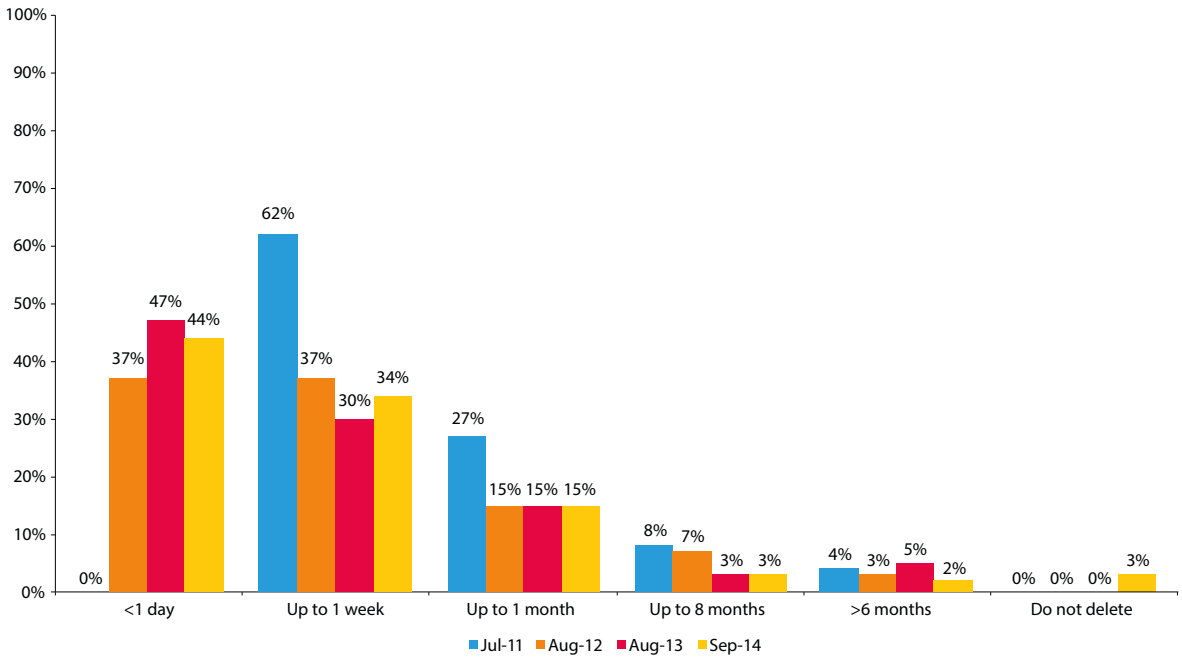
Yet that is a long way from being the full picture. Other response behaviours have risen significantly and many of them do not allow for straightforward, direct linking of the behaviour to the original email. For example, 30% of consumers now say they will go to the brand's shop, up significantly from 22% in 2010. Similarly, 35% will visit the brand's website, but not by clicking-through directly from the email. (It is likely that they will either directly enter the URL into their browser or search for the brand.)

Indirect response of this sort is closing the gap with direct click-throughs, creating an attribution challenge for email marketers. Further diffusion of email's effect comes from consumers saving an email for later reference (45%) or just bearing its information in mind for later (38%). Nor should marketers rely on viral effects - just 3% of consumers say they go to social networks or blogs after receiving an interesting email.

3.2 How long marketing emails are kept



It is tempting to assume that marketing emails have the same lifespan as a mayfly, being born and dying within 24 hours. For 44% of consumers, that holds true as they only retain marketing emails for less than a day. Although slightly fewer than in the previous survey (47% claimed this duration in 2013), this is a rise on 2012 when only 37% of consumers were this swift to deal with brands' communications. (Prior to 2012, the survey used one week as the shortest hold period available.)

What this reveals is that email actually has a shelf-life. The most interesting dimension for marketers is that one third of consumers (34%) hold onto emails for up to a week. That would seem to fit with a buying cycle based in the concept of the "weekly shop" - if the email is from a retailer, a visit may well be planned within the next seven days. Similarly, some product or service categories may only be bought monthly (perhaps around payday for indulgence items, for example), which could be why 15% of consumers keep marketing emails that long.

Where email is being retained for longer, this is most likely due to the absence of routine deletion (or possibly just a lack of time). Even so, nearly six out of 10 marketing messages live on beyond the day of their delivery - and therefore have the potential to trigger action later on. But there are strong signs this behaviour is decaying - in 2011, consumers held onto marketing emails for an average of 19.6 days, falling to 15.5 days in both 2012 and 2013. By 2014, the average retention period had dropped to 10 days.

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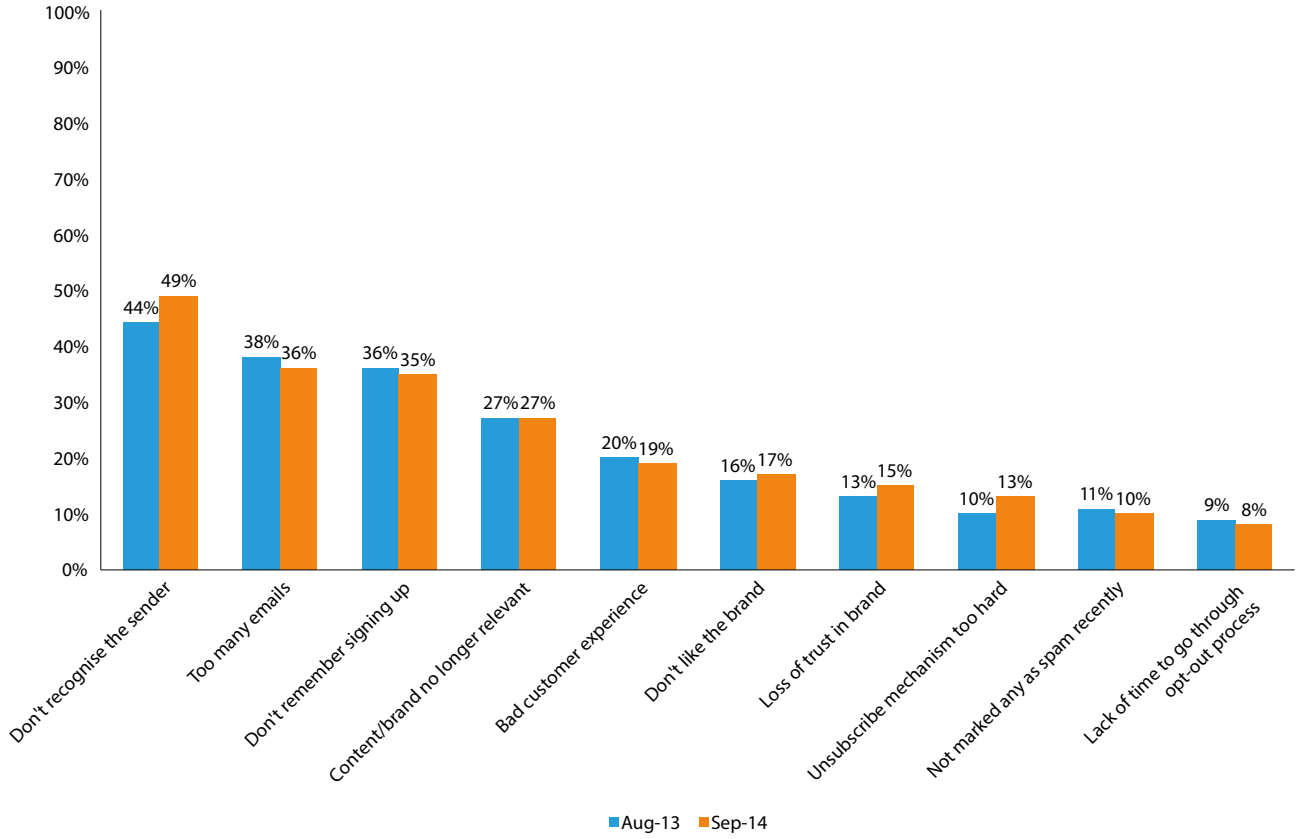
3.3 Reasons consumers mark a brand's email as spam



Hitting the spam button is a behaviour any brand wants a consumer to resist. The impact is threefold: loss of contact with the individual; reduction in the contactable universe; and risk of blacklisting by ISPs. All three bring down delivery rates.

For half of consumers (49%), the principle reason for labelling a marketing email as spam is that the sender is not recognised. From the consumer's perspective, this may be the result of (legitimate) data sharing leading to messages from companies outside of the normal sphere of engagement. (Extending reach in this way is at the very heart of direct marketing, after all.) From the marketer's perspective, it could be that certain techniques - such as using an individual in the "From" field - lead to the consumer failing to register the email's origins from within the brand.

In some cases, consumers have just had enough - through a bad experience (19%), dislike (17%) or loss of trust (15%), they decide to black label the sender. But equally, all products and services have a lifecycle and if the recipient has already purchased in (or moved out of) the category, any email will lose its relevance - that is what 27% give as their reason.

Data protection issues present a worrying theme, however. Over one-third (35%) say they do not remember signing up, which may well be true if they provided an email address a long time ago. Marketers need to be mindful of the concept of an email address having a shelf-life. Trying to reduce unsubscribe rates is also likely to backfire, since 13% hit the spam button if the unsubscribe mechanism is too hard and 8% do so if they simply lack time to opt-out.

The good news is that one in 10 consumers have not marked any marketing emails as spam recently - a positive sign that relevance is rising.

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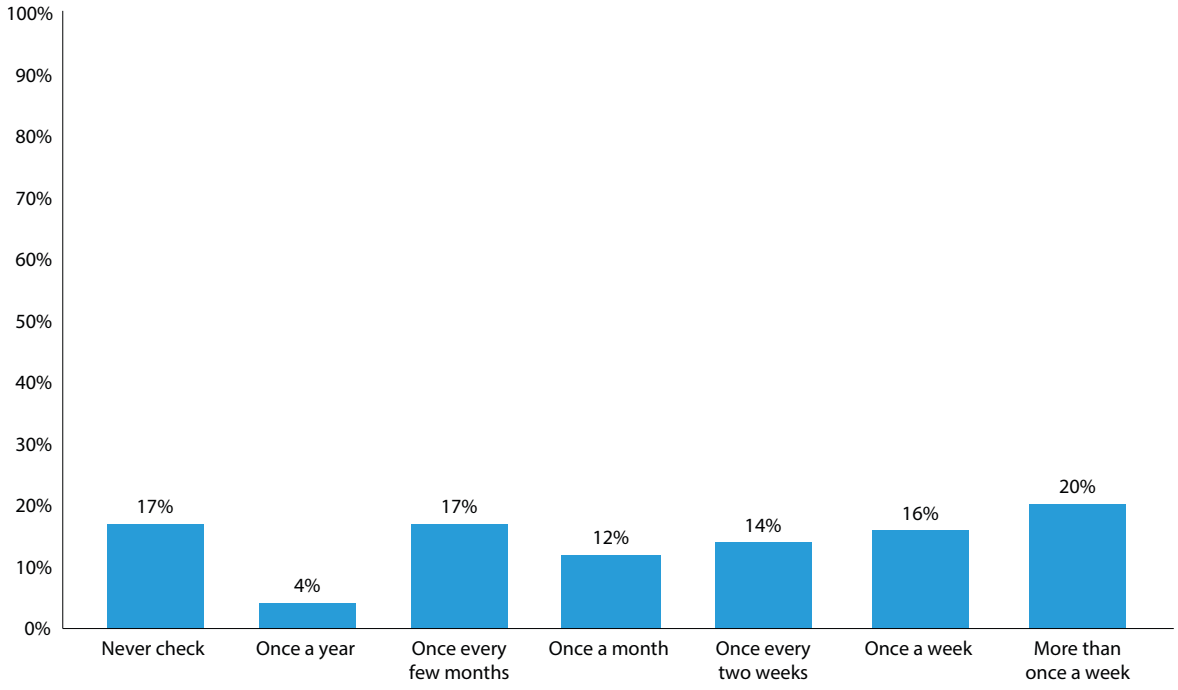
3.4 How often consumers retrieve brand emails from spam folder



Have ISPs gone too far in filtering out emails which they consider to be spam? Half of consumers routinely find messages from brands they trust have gone into a spam folder and retrieve them over the course of a week or every couple of weeks. Over a third look for these messages once a week or more. Forcing consumers to have to seek out information which they have positively requested looks both intrusive and against the interest of the ISPs' own customers.

Marketers may be pleased at the second chance they get as a result of consumers checking for what they might have missed. But the intervention of spam filters clearly disrupts the timing of email marketing campaigns - 29% of consumers only check their spam folder for messages from brands they trust either once a month or every few months.

Filtering out supposed spam in this way only works for 17% of consumers - the ones who never check this folder and are therefore not particularly worried about what they might be missing. A much smaller group take a look just once a year - it is unlikely that they find messages relevant which could be up to 365 days old.

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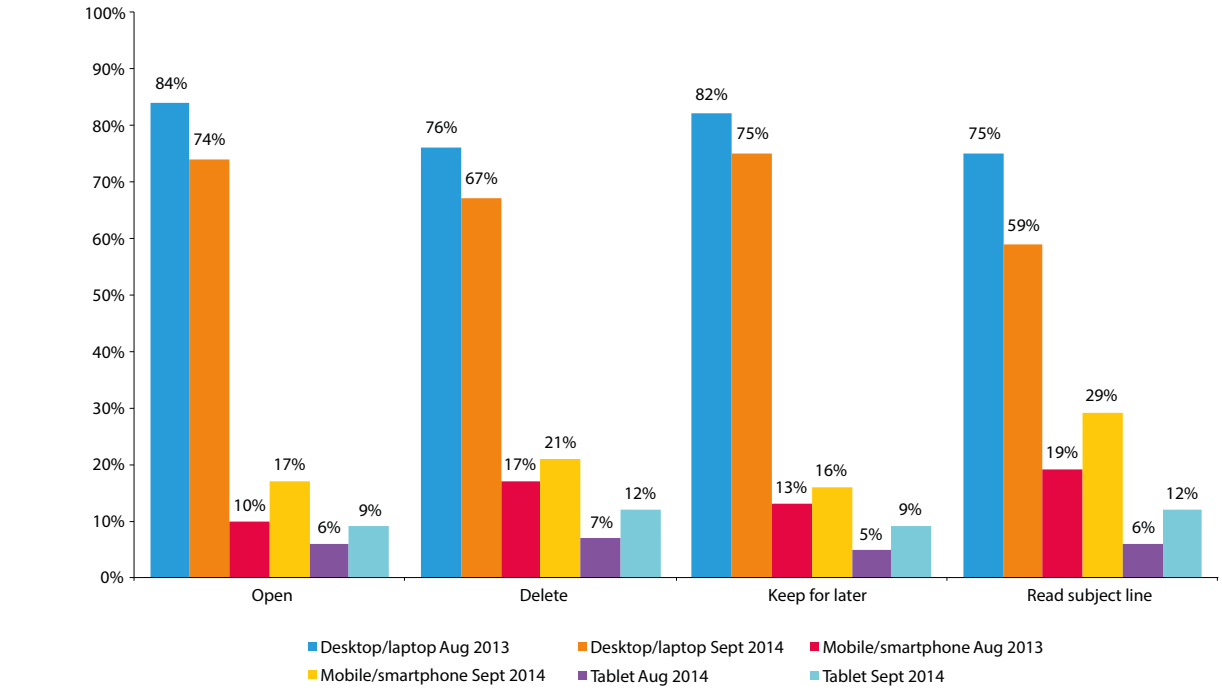
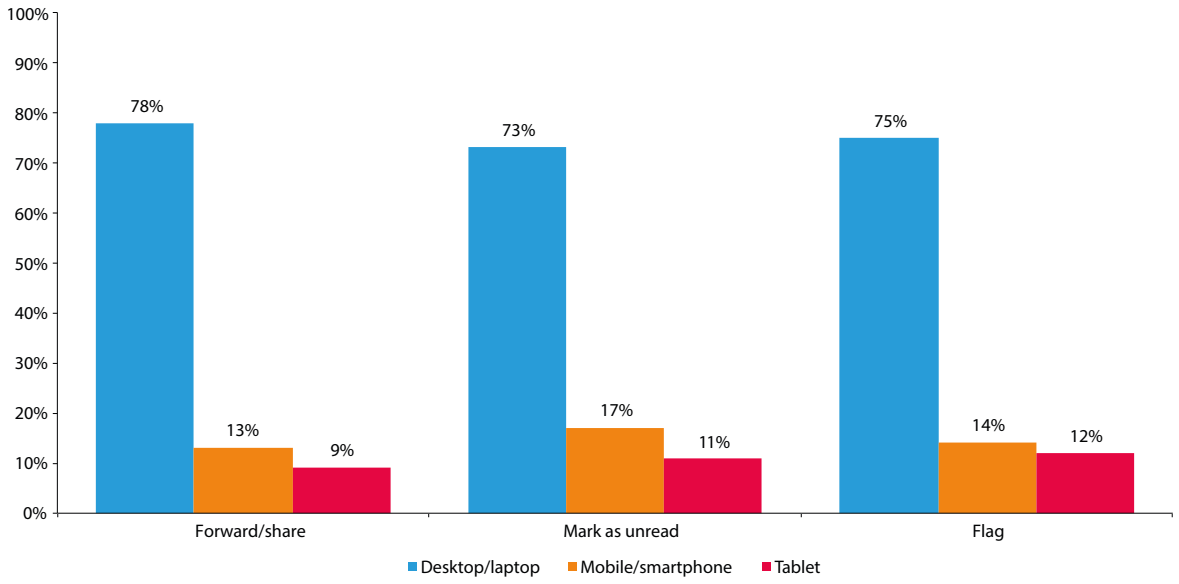
4. The multi-screen consumer

4.1 Device used most often to access email - and action taken





Tablets and smartphones are increasingly being used to manage marketing emails in the consumer's inbox - but the desktop PC or laptop are still the most commonly-used devices to deal with email. This is clear proof of the growing multi-screen nature of the consumer and the need to recognise that the customer journey happens across devices, as well as across channels.

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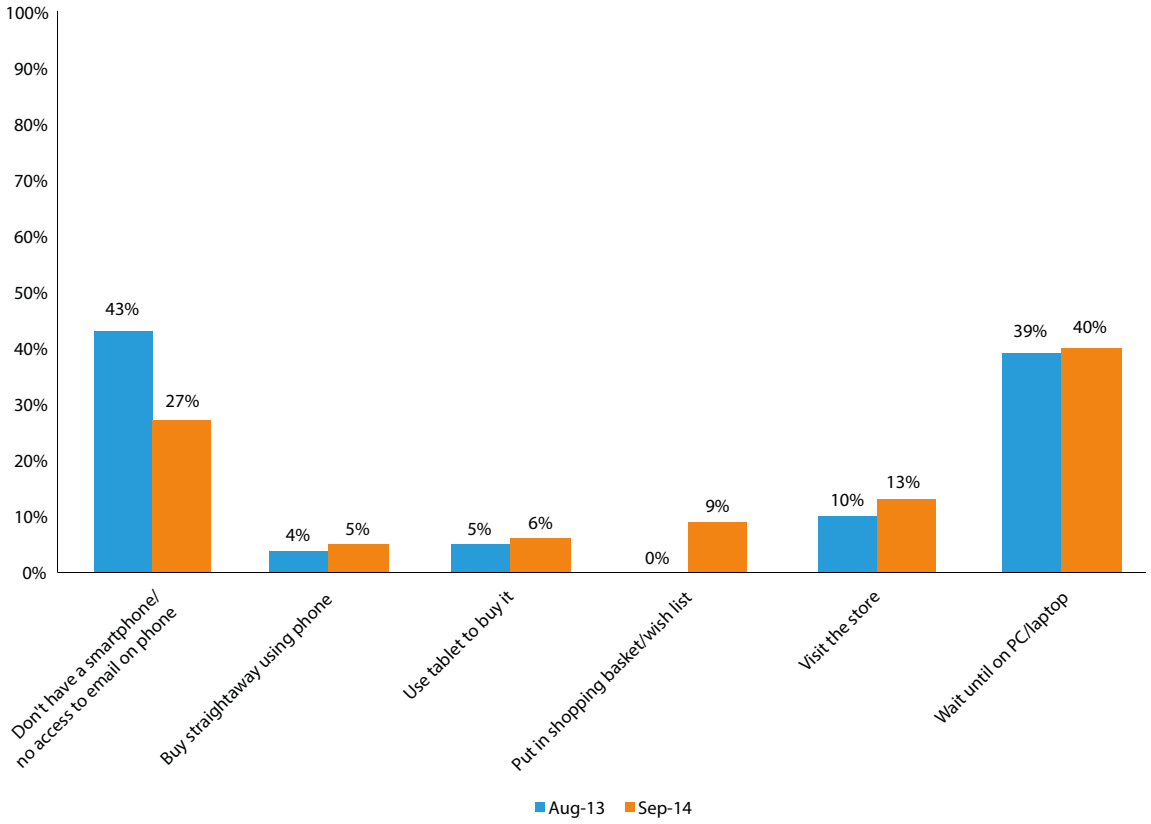
Using a smartphone to read the subject line has risen by half since last year, with 29% dealing with email this way in 2014 compared to 19% in 2013. Tablets have seen their use to read the subject line double in the same period. These mobile devices are increasingly being used to manage marketing email, either by opening (17% for smartphone, up from 10%, and 9% for tablets, up from 6%) or deleting (21% smartphone, 12% tablet). The consistent proportion of consumers reporting all types of email management on their tablet or smartphone indicates that these devices have become the main access route for a specific segment.

Yet it is the tethered device which is still primarily used for between two-thirds and three-quarters of consumers. Year-on-year this proportion has fallen by as much as 16% (for reading the subject line), indicating a high degree of switching to mobile devices for initial reading and sorting, at least. A cross-over point will no doubt be reached - but it remains some years off as consumers continue to exploit their installed technology base and the habits it has created.

4.2 Action when consumers want to purchase something in email



When a relevant email with a compelling call to action is accessed via a smartphone, consumers may decide to make a purchase. What happens next is a testament to the power of email marketing - but also a radical challenge. The multi-screen, multi-channel consumer can no longer be simply tracked from a click-through as only 5% use their phone to make a purchase straightaway, with 6% using a tablet to buy. Young consumers aged 18 to 24 are twice as likely to buy straight from their phone (12%), while the 25 to 34 age group are twice as likely to use a tablet (12%), but older consumers are the least likely to do either.

Instead, the dominant behaviour among 40% is to wait until they are at their PC or on a laptop. Between the ages of 25 and 54, nearly half of consumers say they do this, although the age groups either side are less likely to do so. This may involve finding the same email and clicking through, or it could involve finding the website directly or through search (as 35% reported in a previous question).

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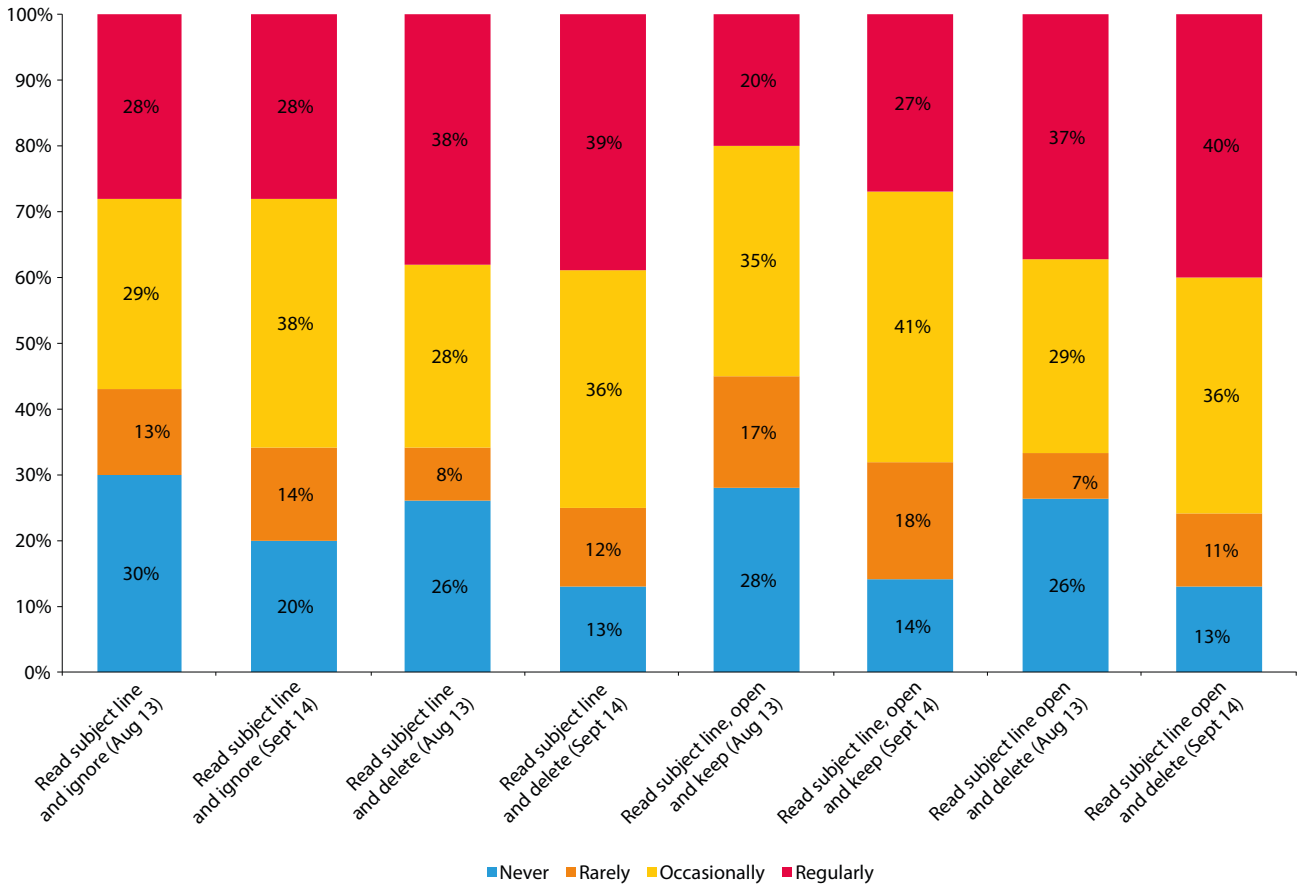
Even harder to track are the 13% who will visit the brand's retail outlet - a behaviour which is increasing. Among 18 to 24-year-olds, 23% say they are most likely to visit a store (possibly in response to offers designed to generate store, rather than web traffic). The youngest consumers are also more than twice as likely to put an item into a basket or wish list (22%).

As the penetration of smartphones rises - clearly seen in the declining number of consumers who say they do not have one - it might be hoped that the customer journey would become more seamless and therefore trackable. Instead, consumer behaviour continues to defy easy observation and management - and presents marketers with difficulties in the attribution of sales resulting from email marketing.

4.3 Action with email received on smartphone



Smartphones are now clearly part of the customer journey and also enable quicker access and action on email, whether that is to open, delete or ignore a message. Perhaps to avoid having a cluttered inbox on a device with a small screen, consumers clearly act more immediately on email that arrives on their phone than when it is accessed via other devices.

So the number who read the subject line and ignore the message has risen to 66% regularly and occasionally doing this from 57% in 2013. Likewise, reading the subject line and deleting is now done regularly or occasionally by 75%, compared to 66% previously.

Marketers have every reason for optimism, however, in the fact that the number who open emails after reading the subject line has equally risen - 68% will read, open and keep a message, up from 55% in 2013, while 76% read the subject line, open and then delete, up from 66%.

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Methodology

- The sample were randomly selected from fast.MA P's Consumer Voice panel to gain a sample that's representative of the UK population
- The panel is closed i.e. members of the public cannot voluntarily join. Members are recruited via a number of sources to demographically represent the markets based on age and gender
- Methodology = online self completion questionnaire to fast.MAP's Consumer Voice panel
- 19 questions were asked in total
- Survey despatched 25th September 2014 and stayed open until 2nd October 2014
- N = 1,061
- Results are re-weighted by age and gender
- Randomisation of answer options was activated to avoid top box bias
- An acceptable completion time for the survey was set to help remove any surveys that were completed in a quicker time
- Constant re-qualification of the panel ensures that background variables are updated. Differences from initial recruitment can result in being removed from the panel.

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About dbsdata

As a business information solutions and sales & marketing intelligence provider, high volumes of multi-channel business and consumer data sit at the heart of everything we do. We validate, enhance and make these assets available to our clients for their customer acquisition & retention, CRM, risk management and data management challenges.

We really do believe that properly targeted communications, utilising accurate and reliable data, benefits consumers and businesses alike and that good data lies at the heart of any meaningful communication.

Being creative with data is within our DNA, it's what sets us apart and drives unique solutions for you.

To find out how DBS can help you with your requirements, please get in touch with Gary Brandon (gary.b@dbsdata.co.uk). You can also visit our website www.dbsdata.co.uk

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About *fast*.MAP

fast.MAP uses the power, economy and speed of testing to help clients to create marketing messages which really sell.

Through creative and concept testing, to messages, attitudes and price-points, the quick, incisive research helps marketers make better business decisions and maximise return on investment.

We are marketers working in research and with direct client-side experience, understanding what needs to be done and focusing on results. We know your time is precious so have honed our processes to get accurate results - fast. In fact, we have never turned a project down because we can't meet the timescales.

We have our own research panel and also access to millions of consumers around the world via our strategic partners. We are proud of our service approach and love doing our best for our clients. fast.MAP's work is published by much of the UK marketing media and we are delighted that fast.MAP is Insight Partner to the IDM, IPM and DMA, as well as Research Champion of the Institute of Fundraising.

Our expertise can ensure you get the most valuable insights from your research. We have helped clients and agencies from the following industries: financial, automotive, travel/transport, charity, marketing communications, media, IT/ technology, retail, pharmaceutical, FMCG and more.

Our marketing solutions include:

- Price testing – what is the optimum price or ask level?
- Creative testing – how can creative be improved?
- Incentive testing – which incentive should I use?
- Customer profiling – where can you get more of your best profile?
- Cross-country evaluation – how do consumers in different countries react to our ideas?

We also test your new permission statements via the Data Permission Benchmark, in conjunction with Opt-4. Supported by the IDM and IOF, it enables people to maximise their consent levels, generating more income – crucial given the proposed EU Data Regulation making all marketing opt-in:
http://www.fastmap.com/data-permissions-benchmark.aspx

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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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