



Email Tracking Study

2011

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Introduction

Consumers are the ultimate judges of how well the email marketing industry is performing. That's why the annual DMA / *fast*.MAP Email Tracking Study provides such valuable insight for marketers: it tells us what consumers really think of the marketing emails they receive, the content they prefer, what captures their attention and what turns them off.

This year, the study will make particularly welcome reading for email marketers. The results reveal that consumer approval ratings of email marketing have surged over the past 12 months. The number of consumers reporting that 50% or more of the marketing emails they receive are of interest to them has increased over the past year from one in 10 (9%) in 2010, to one in three (30%) in 2011. Just one in four (24%) of consumers now say that only less than 10% of the marketing emails they receive are of relevance to them – down from two-thirds (64%) of consumers in 2010.

The study also reveals that consumers are signing up to receive regular emails in ever-greater numbers, with 50% of consumers reporting that they now receive 20 or more emails from brands they trust every week.

It's particularly satisfying to see that brands are applying the lessons they've learned on how best to build trust with their customers. Trust is built on more than consumer confidence in brands protecting their personal data; it's based on the confidence they have that their favoured brands understand their tastes and interests and will email them with relevant offers, promotions and product information. The techniques that underpin relevancy, such as sophisticated segmentation and well targeted content, have been finely honed by the industry and can be credited for the massive rise we've seen in consumer approval ratings of email marketing. In troubled economic times, this will be a positive sales message for businesses across the land.

I would also like to thank Alchemy Worx for sponsoring the 2011 Email Tracking Study; their support of the study is the email marketing industry's gain.

Chris Combemale
Executive Director, DMA



Sponsor perspective

Welcome to the DMA's Email Tracking Study, another fascinating collection of insights into consumers' interactions with email as a marketing channel – and with your brand.

With a range of interesting new questions added for this third wave of research, we can see that permission-based emails from trusted brands are a distinct – and distinctively valuable – class of messaging that needs to be assessed on its own terms. As a trusted brand in a consumers' inbox – an email VIP – the potential benefits are many and massive.

Marketers are not ordinary consumers. As marketers, we use email very heavily and incessantly on our tablets and smartphones, and tend to think everyone else does too. But most email users are not like this. Many (61%) don't check email at work, and any heavy email use is usually done at home. Most still use PCs and laptops to access their email.

Nor are consumers feeling overwhelmed with marketing messages. People are happy to enter email relationships with brands they trust, and show little concern about frequency or overload. At least half of them get fewer than 3 emails per day from trusted brands, and 61% have signed up to emails from 10 or fewer brands. (Not recognising the sender was the reason 22% of people said they'd mark the email as spam – not a problem for a trusted brand.)

The highlight for me – and something we've seen borne out in our work here at Alchemy Worx – is that the number of people who say that only 0-10% of the emails they receive are interesting or relevant has dropped hugely, from 65% to 24%. Better still, the number that find at least half of them relevant or interesting has shot up from 9% to 30%. Why? Because for the first time, the question focuses respondents not just on email generically but on "email from brands you trust". Brand equals relevance.

Email makes things happen in other channels and at other times too. Many consumers hold on to email to refer to for later use, which is vital for attribution and a valuable growing trend: a consumer who returns a week later to retrieve a commercial email demonstrates very high purchase propensity, for instance. And 22% of consumers will be inspired by an email to go to the company's website via another route (such as the url), as opposed to the 14% (and falling) who would be prompted to visit a comparison shopping site, showing that email plays a central part in the wider brand relationship too.

All in all, the report is powerful evidence that email marketing is coming into its own as a trusted and effective channel, both in its own right and as part of the wider marketing mix. The rewards for those brands in the trusted magic circle are clear: a strong opportunity to maintain a fruitful relationship with a qualified subscriber.

Email's success story continues to grow and develop, and I look forward to the next report with real confidence.

Dela Quist
CEO, Alchemy Worx



fast.MAP's perspective

Like all things digital, change happens quickly. And with this wave's results, we've seen some dramatic movement and all generally positive. These series of tracking studies are designed to give greater visibility and insight to marketers in addition to the standard metrics that they might get with a campaign. In email marketing the standard currency will be numbers delivered, click-throughs transactions etc. But these only tell half the story and don't give any real insight into what might be driving change. Critically, they don't tell a brand how the important measure of trust is being impacted by campaign activity.

What struck us from the results of the previous waves and the debate that was prompted at the events was that direct marketers were realising that they have an ideal medium to practice right message, right time, right person thinking and targeting. All core disciplines that underpin the industry but yet email marketing wasn't being fully exploited and was being treated in some cases as a broadcast discipline with no tangible down-side of over mailing / poor targeting.

But a number of things have happened since this tracking series started. The economy has created a proactive, deal hungry consumer who wants to save money wherever they can. The email service providers have tightened up on inbox security to actively and aggressively deal with spam. And marketers have realised that they must practice core direct marketing disciplines along with acknowledging that trust in a brand is deeply entwined with data and how it's used. These combined have driven mailers to be more focused and appropriate which has made consumers put their hands up to receiving relevant information and to continue to engage with those who get it right.

There is still much to learn however and regular engagement with customers and a hunger to constantly evolve and monitor trends will ensure marketers continue these positive trends. For example, the growth of mobile email use presents new opportunities, but also challenges. If marketers simply send the same messages but via a different channel, the learning process will be based on failure as opposed to success. A mobile device gives greater access but far less opportunities for messaging and branding.

We hope that these tracking studies prompt both debate and generate actionable ideas for marketers. They are also a unique opportunity for us to dip into consumer's digital lives, which are in general not typical to those working in the marketing industry.

Paul Seabrook
Head of Research, fast.MAP

fast.MAP is an insight partner that continuously connects clients in real-time with their customers.

As exclusive insight partner to the DMA, we run a number of tracking studies designed to give DMA members primary insight into key areas that support the direct marketing discipline.

The combined experience of our directors spans many industries, disciplines and methodologies and the solutions we provide can be executed from within the business.

Industry expertise: Financial, Automotive, Travel/Transport, Charity, Marketing Communications, Media, IT/Technology, Retail, Pharmaceutical, Travel/Transport, FMCG and more

Methodologies: Quantitative: online, telephone and face to face; Qualitative: in-depth interviews and online focus groups

For further information visit www.fastmap.com or call Paul Seabrook on 0207 242 0702 (paul.seabrook@fastmap.com)

1. Inbox habits and activity

The typical marketer is also a heavy email user, working with net-savvy colleagues with equally busy inboxes.

Collectively and individually, marketers may assume other people's email accounts are no different. Campaigns must struggle for space and attention in inboxes overflowing with personal and work email, but also with promotional and transactional messages from a host of competitors. Users invest hours in each day to keep on top of the email deluge.

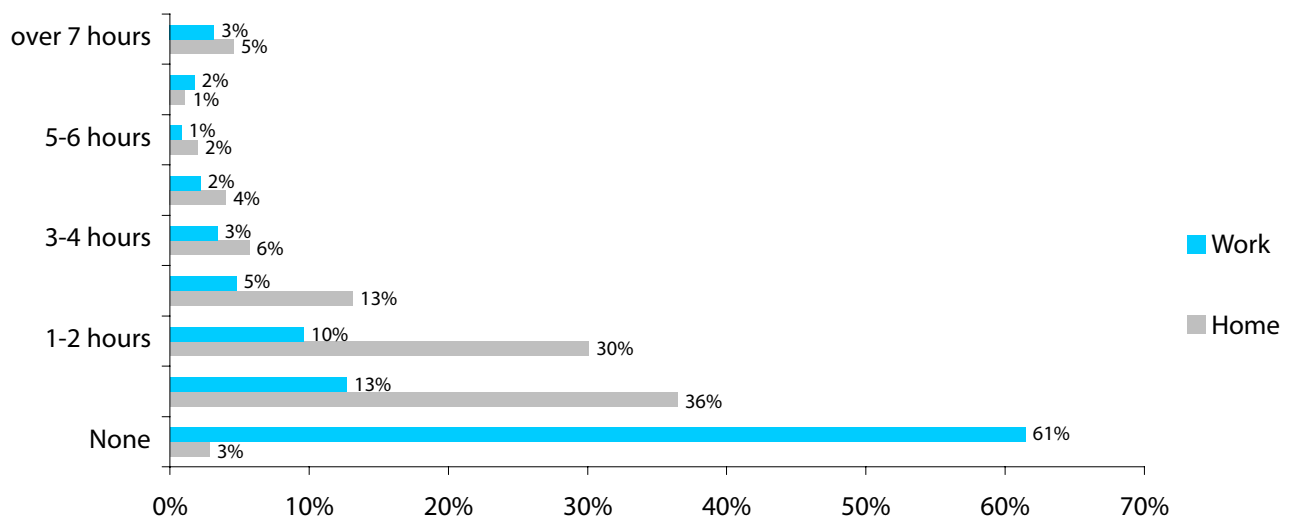
The Digital Tracker results show that this image is not an accurate one for most email users.

The discrepancy between perception and reality begins with the amount of time spent with email. Key results here are:

- 61% of respondents do not check email at work, and fewer than 1 in 6 individuals spend more than 2 hours on email during working hours.
- Almost 70% of respondents spend less than 2 hours a day on email at home

In summary, **heavy email use is relatively rare and more common at home**: almost the opposite of the beliefs held by many in the marketing industry.

Chart 1: How much time do you spend on email per day at work and home?



The actual time spent with email shouldn't be a surprise.

In the USA, for example, the Pew Internet and American Life Project has tracked online activities for over a decade. The latest survey¹ shows email as the top activity (used by 92% of Internet users, the same figure as in April 2000), but only **61% send or read email on a typical day** (it was 50% in April 2000).

Email attention becomes yet more elusive when multiple email accounts are taken into consideration. The DMA's 2011 Data Tracking Survey², for example, found over a third of consumers now have at least one email account that is checked less frequently than others.

These results suggest that timing of campaigns is perhaps more challenging than previously thought. If most people spend none of the working day and little time at home with email, then trying to time campaigns to hit the top of the inbox just when people are checking email is going to be tricky. It may not even be necessary, if people review all emails when they do check email³.

Time of day then becomes subservient to timing in terms of customer lifecycle, day of week, day of month, or simply proximity to payday.

¹ <http://www.pewinternet.org/Trend-Data.aspx>

² <http://www.dma.org.uk/toolkit/fastmap-dma-data-tracking-study-2011>

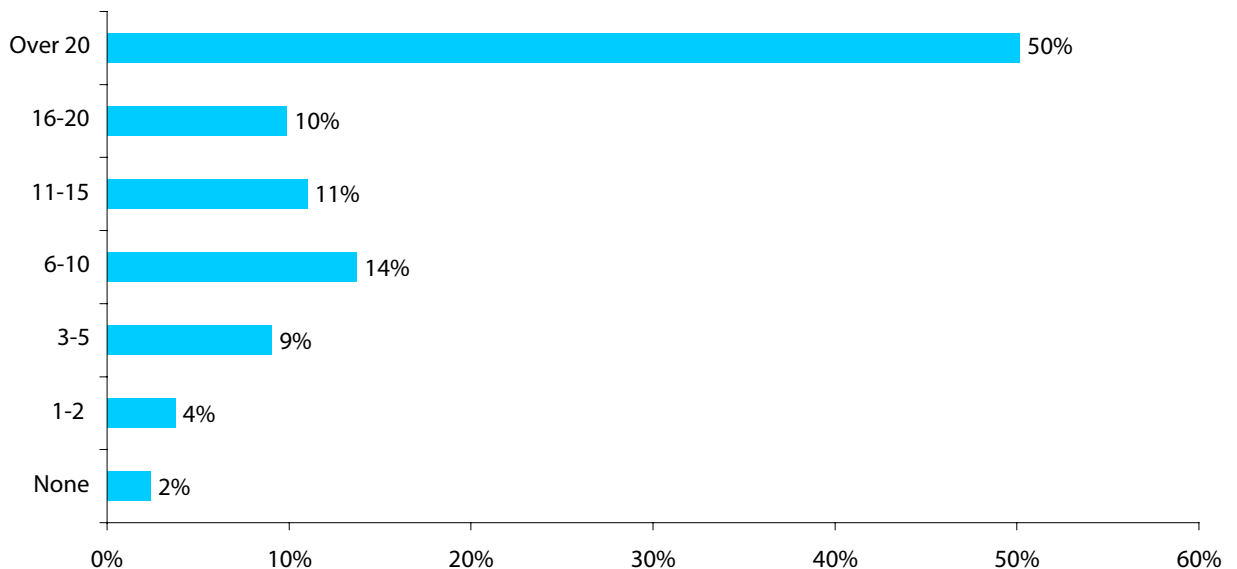
³ See <http://blog.emailvision.com/eng/campaign-send-time-isnt-important>

There are, of course, exceptions. Very granular attempts to match send times with individual or segment email habits will likely bring more success. A premise behind the value of trigger emails, for example, is that their timing is commonly driven directly by user behaviour: an order confirmation email arrives seconds after an order is placed, when the recipient is online, engaged with the sender and likely expecting the message.

Another lesson is for time-dependent emails, such as 12 hour sales, or promotions for offline events and activities tied to a particular period of the day, such as a restaurant's lunch promotion. If people spend relatively little time with email, then these need to go out early enough to ensure they get seen in time.

In the future, growth in mobile email use may also change how often, when and for how long people check their email.

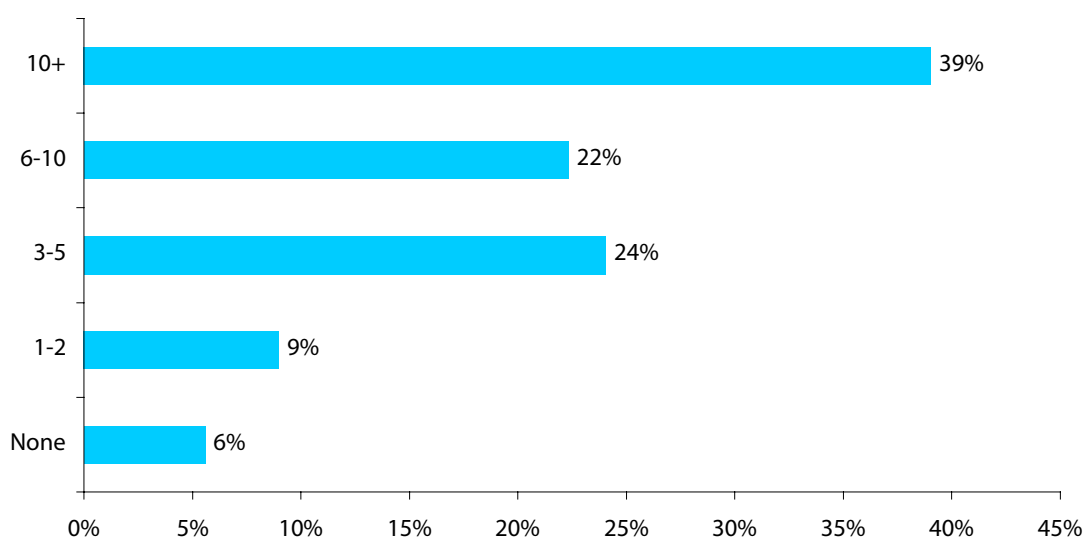
Chart 2: How many emails do you receive in your inbox on average each week from brands you trust?



Inboxes are not overflowing with commercial permission email, either. At least half of respondents get less than 3 emails a day on average from trusted brands, a number which likely includes both transactional and commercial email.

These messages also arrive from a limited number of senders: 61% of respondents have signed up to emails from 10 or fewer brands.

Chart 3: How many brands are you currently signed up to receive emails from?



There are a number of insights here.

First, **people are clearly happy to enter email relationships with brands**: 94% of respondents signed up for email from at least one brand.

This somewhat obvious statement is important, because there is a tendency among marketers to see permission-based emails as imposed, rather than requested. This can lead to a reluctance to fully embrace email as a communication channel with subscribers for fear of a negative backlash. While poor practices will inevitably produce poor results, those that signed-up for emails did so for a reason: done appropriately, the sender's emails are perceived as a service, not "marketing".

Second, **email overload from trusted brands is unlikely to be an issue for many email users**. It may therefore be worth experimenting with increasing frequencies. The DMA's latest benchmark data⁴ on UK email marketing shows email frequency at a long-term low, at around 2 messages per month per address and sender. The H2 2010 report concludes:

"UK senders are clearly not over-mailing"

The Digital Tracker results confirm this impression.

Third, **senders are not necessarily facing inbox competition from traditional competitors**. People enter relatively few email relationships with brands, when you consider the large number of brands they buy from or interact with. This has various implications.

Many senders may be the only representative from their particular market sector in the inbox. Email-only offers are therefore more likely to be evaluated in their own right, rather than in comparison with similar emails from competitors.

The proviso here, of course, is that email does not operate in a vacuum: competitive offers and messages reach subscribers through other channels, such as TV, social networks, etc. Nevertheless, the like-for-like inbox competition is perhaps less than many marketers assume.

This may also depend on the market segment. Subscribers to deal aggregators (like many travel comparison sites), for example, may be signed up to several competing lists as they look for the best offers.

Fourth, **subscribers are not signing up to unlimited lists**. Merkle have tracked the size of the email "inner circle" (the number of companies the average user gets email from that they actually read) for several years: the latest reported number⁵ is 11.3 companies. This underpins the results from this study.

This inner circle concept is both good and bad for marketers.

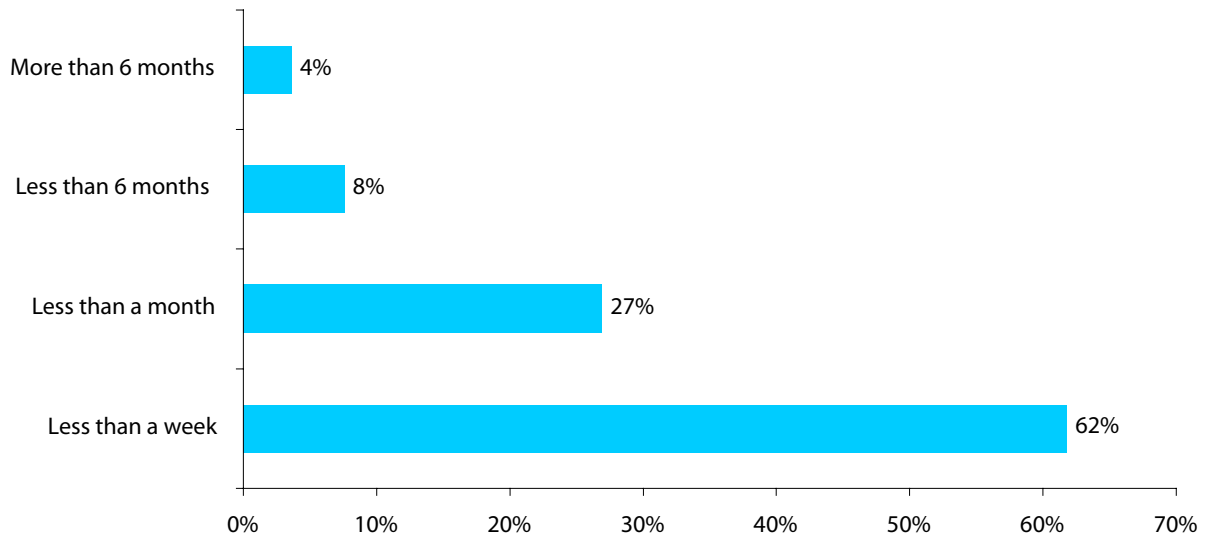
If you are one of the chosen few, then you have a strong opportunity to maintain a long and fruitful email relationship with the subscriber. If you're not, you have your work cut out to get into that inner circle.

The limited size of the inner circle suggests the decision to sign-up may be **strongly influenced by the wider brand relationship**. This reinforces the need for companies to:

- Exploit this relationship by providing sign-up opportunities at key points of contact, such as during customer service calls, at the point of sale or during the online ordering process
- Encourage sign-ups in transactional email (invoices, order confirmations, shipping notices, account summaries etc.) already going to customers
- Ensure sign-up opportunities come with a clear indication of the benefits of doing so

⁴ <http://www.dma.org.uk/toolkit/national-email-benchmarking-report-h2-2010>

⁵ See <http://www.merkleinc.com/thought-leadership/white-papers/view-digital-inbox-2011>

Chart 4: On average, how long do you keep marketing emails in your inbox?

Marketing emails that arrive in the inbox are not discarded immediately. Around 38% of respondents keep them there for at least a week and 1 in 8 keep them there for over a month.

While unique opens typically take place very quickly after delivery (one source found 77% of opens occur within 24 hours⁶), subsequent responses may be spread over a longer time. Many people file emails for later review or return to particular offers, content or promotions down the road when they have a relevant need (see also Chart 14).

This survival in the inbox is often an underestimated aspect of email. At the very least, it leads to additional “brand impressions” each time the email is viewed, whether deliberately or in passing.

It also acts as a reminder to ensure images and links in emails continue to work long-term. Images can even be updated dynamically⁷ to show, for example, a promoted product has sold out or an offer/event has ended.

Equally, the fact that most (62%) emails last less than a week in the inbox and only 12% more than a month has clear frequency implications for those wishing a “permanent” inbox presence. Biweekly, monthly or quarterly mailings (common with B2B content newsletters) are unlikely to reach that goal.

Finally, the data on email habits and activity (particularly time in the inbox and volume of emails) contrasts significantly with the busy and fleeting nature of many social network communications.

Items in the Facebook news feed or a Twitter stream face competition from a far greater volume of messages and will typically disappear off the page in a matter of minutes and hours, rather than days (as is more likely the case with email).

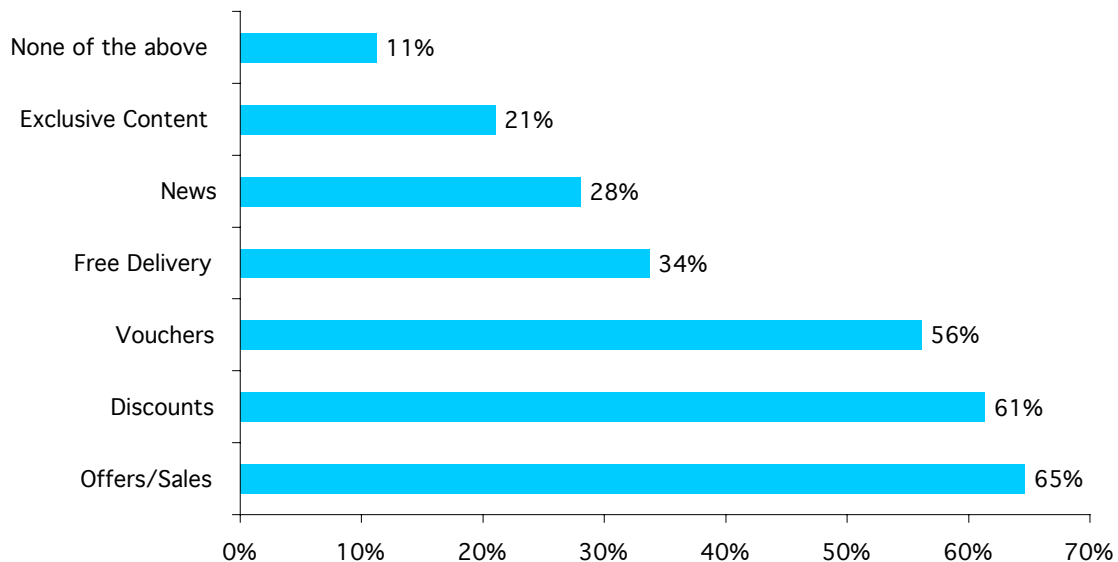
⁶ <http://www.mailermailer.com/resources/metrics/2011/open-rates.rwp>

⁷ See, for example, <http://www.retailemailblog.com/2011/02/am-inbox-boosting-relevancy-by-updating.html>

2. What subscribers want

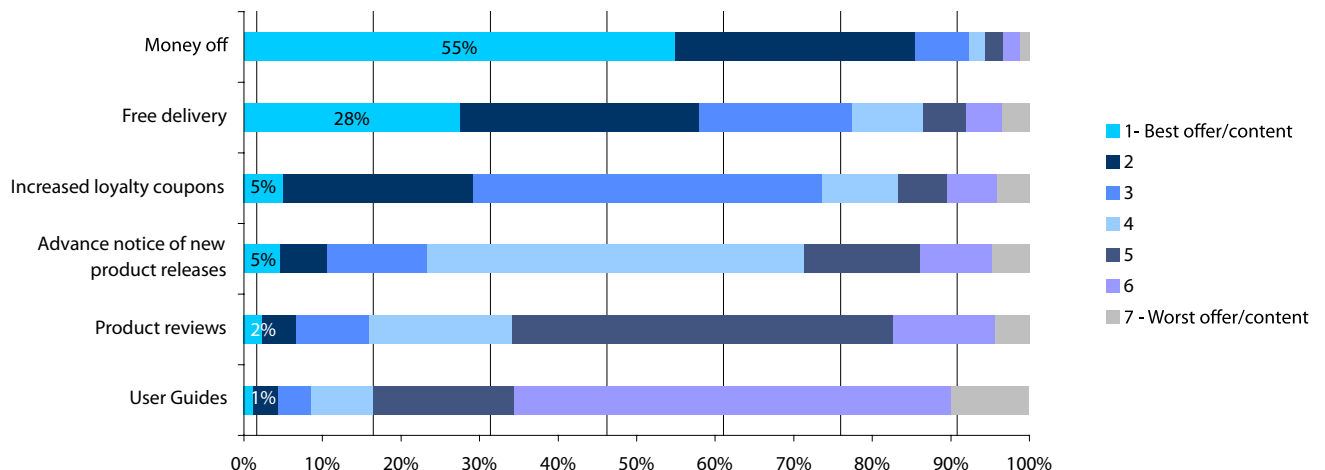
When asked why they sign up to a brand's emails, the most popular answers all concern saving money. Indeed, a full 79% of respondents mentioned at least one of vouchers, discounts and offers/sales as motivation.

Chart 5: What factors cause you to sign up to a brand's emails?



A similar response comes when people are asked about the type of content they like best, with 55% giving "money off" the best possible rating and 30% giving it the second-best possible rating.

Chart 6: What type of offer/content do you like receiving best?



These results are in line with expectations, especially in difficult economic times. Consumers will always respond to an opportunity to save money and many email marketing programmes are based around a steady stream of discount offers. This reported focus on discounts, sales or vouchers by respondents (and thus senders) does carry dangers, though.

Subscriber preferences are partly a reflection of what's available. If, for example, senders pitch their lists as a source of discounts, then people will sign up to...get the discounts. Not necessarily because that is all they want, but because that is what they can get.

Equally, preferences are not mutually exclusive. A preference for discounts or sales does not mean other types of promotions or content are actively disliked.

This simply means that senders should not immediately disregard content or promotions that do not involve “money off” offers. After all, 28% of respondents cited “news” as a reason to sign-up to a list and 21% cited “exclusive content”. Many successful lead nurturing efforts are based entirely around content-based e-newsletters.

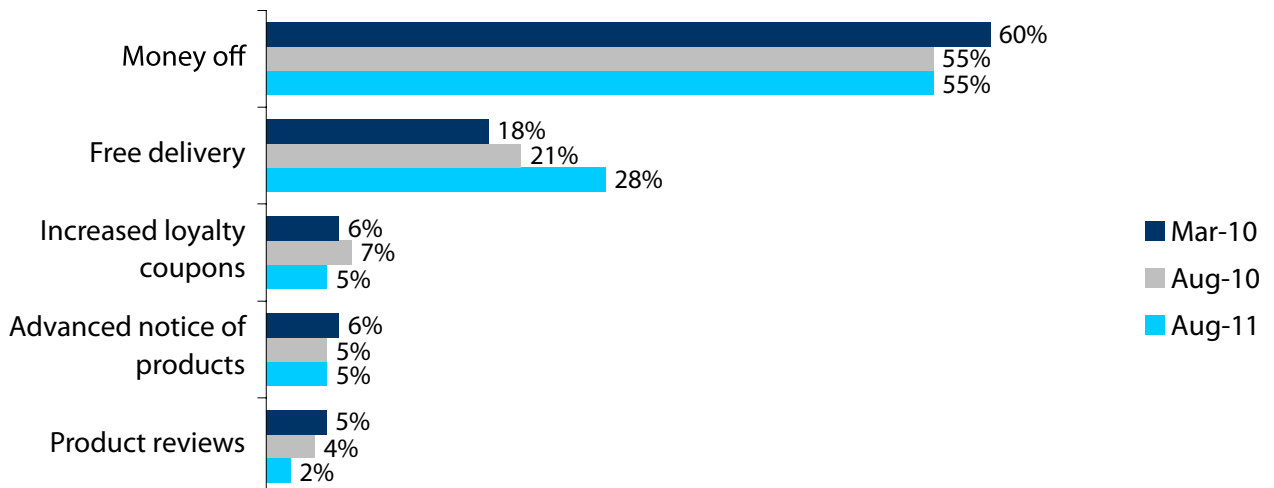
Valuable content (how-tos, behind-the-scenes stories etc.) can also be used in the retail email communications mix to engage subscribers who are not ready to buy right now, building the loyalty and mindshare that makes them more likely to do so in the future.

It’s also worth recalling the data in Chart 3, which suggests many senders may not be competing for attention in the inbox with their regular competitors. This lowers the pressure to compete on price alone. A constant stream of “money-off” content is a legitimate strategy with a successful track record, but it can also train subscribers to become discount-buyers only, delaying or abandoning full-price purchases in anticipation of the next sale, discount or voucher.

The data in Chart 6 suggests little interest in advance notice of product releases, product reviews or user guides. However, all three may still be relevant with the right target audience.

Notice of new releases may be of special interest to brand evangelists. Product reviews and user guides can play an important role for those at a relevant stage on the purchase cycle: user guides for those who have just bought a product, and user reviews for those who are close to doing so.

Chart 7: What type of content do you like receiving best (% choosing top rating, 2010 vs 2011)

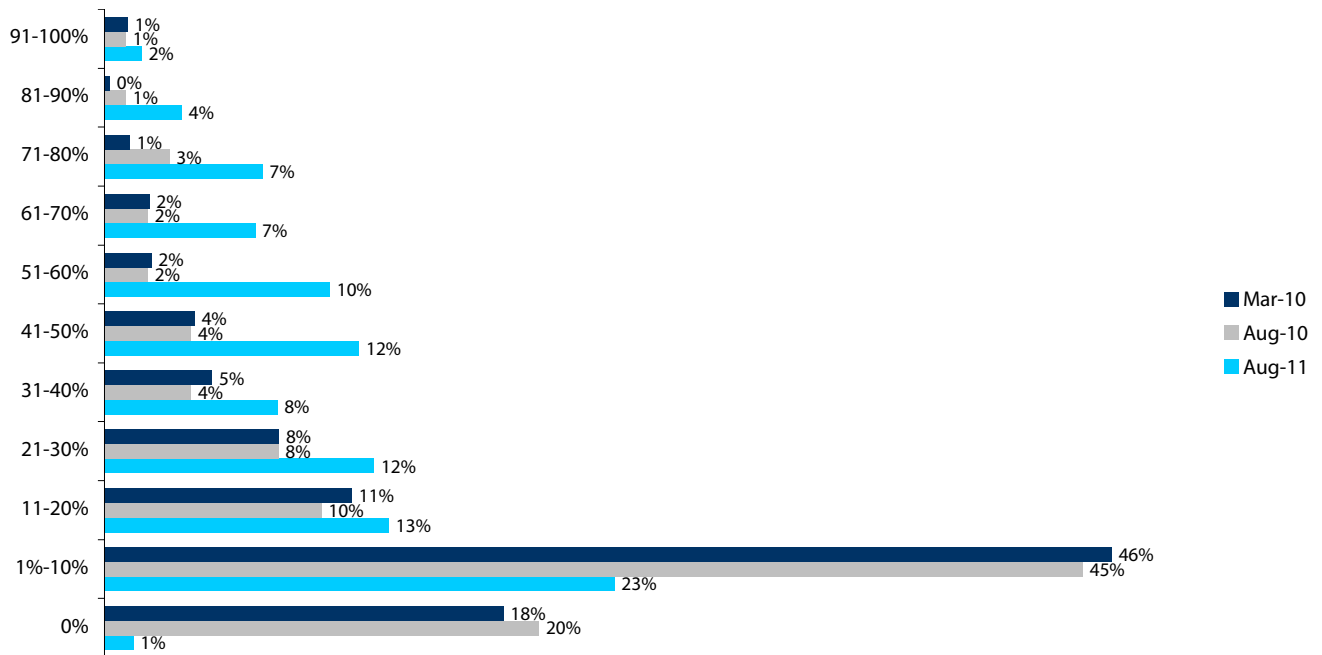


Content preferences have not shifted much since last year’s studies. There is one notable change, however: free delivery for email subscribers is rated far more highly in 2011 than in 2010. This likely reflects growing awareness of delivery costs and how they change the comparative value of an offer. In a broader sense, free delivery may be moving from a preference to an expectation, where it becomes a must rather than a differentiator.

3. Responses & reactions to commercial email

The first two sections of this report suggest the foundation for commercial email is strong. Subscribers welcome select marketing email from brands they trust, and are clear on the kind of things they like to see in those messages. But how do they rate the emails they actually get?

Chart 8: What percentage of emails from brands you trust do you consider interesting or relevant to you?



As Chart 8 shows, the perceived value of marketing email has **risen dramatically** over the past year.

For example, the number of respondents describing only 10% or less of emails as interesting/relevant **fell from 65% to 24%**, while those describing over half as interesting/relevant **rose from 9% to 30%**.

There are likely a number of factors behind this success.

- Senders are certainly improving the value they deliver via email. This can be seen in benchmark statistics, where the latest report⁸ from the DMA reveals a year-on-year increase in clickthrough rates.

The same report indicated senders made more use of simple segmentation tactics, which would contribute to improved performance. Another factor may be wider application of trigger emails and greater awareness of the value of transactional and administrative emails in driving both the email relationship and email response.

- End users may be differentiating more between legitimate communications from brands they buy from (or signed-up to) and unsolicited commercial email (i.e. spam).

This speaks again to the point raised in Section 1: people have divergent opinions about “marketing” email, but don’t necessarily include the newsletters and promotions they signed up for in this description. **The perception of the email relationship reflects the perception of the wider relationship with the sender/brand.**

- This differentiation is helped by improvements and new features in email clients and webmail services. In particular, inbox management tools (like Gmail’s Priority Inbox) allow users to focus more on wanted emails. Inboxes and ISPs are getting better at “weeding out the rubbish”.

⁸ <http://www.dma.org.uk/toolkit/national-email-benchmarking-report-h2-2010>

Improvements in inbox management are a double-edged sword for senders. Control and prioritisation tools shift inbox attention and reading time to select “important” emails: great for quality email senders who can achieve that label, bad for other senders who cannot.

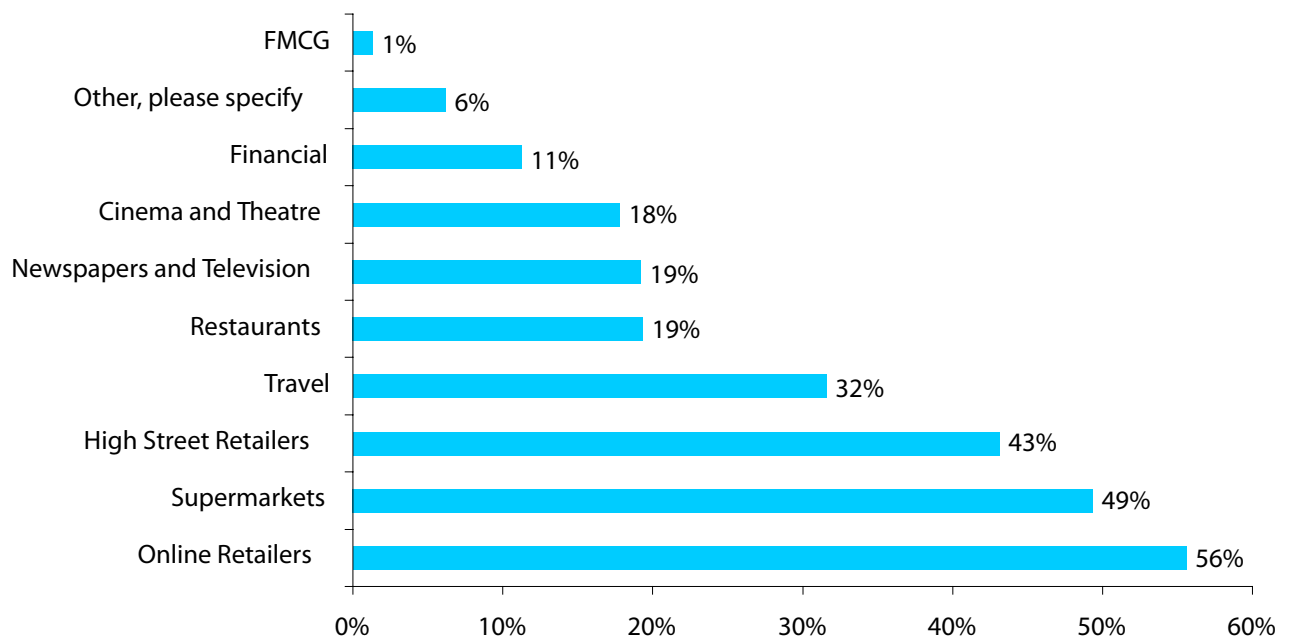
A legitimate question might be how much perceived improvements in relevancy/interest are driven by improvements in what is sent and how much by better spam filtering and inbox management so only the good emails get seen.

- The continuing poor economic climate may also encourage subscribers to better value emails offering cost savings than they might have done a year ago.

Finally, while UK marketers deserve congratulation on their email success, there is still room for improvement: **over a third of respondents still describe four out of five emails from trusted brands as not interesting or relevant.**

In terms of specific industry sectors, respondents consider online retailers, supermarkets and high street retailers do the best job of email:

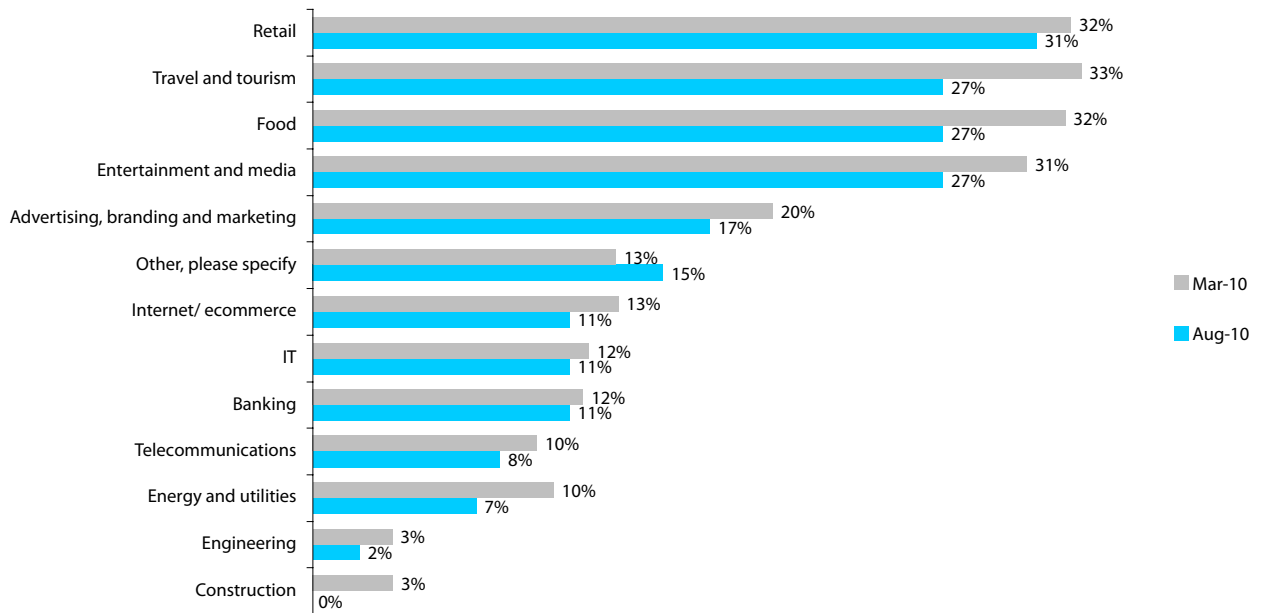
Chart 9: Which industry sectors do you think do email well?



These numbers cannot be taken entirely at face value, as they will also reflect the popularity of certain types of lists as much as people’s experiences with them. More people sign-up for marketing email from online retailers than from cinemas or insurance companies.

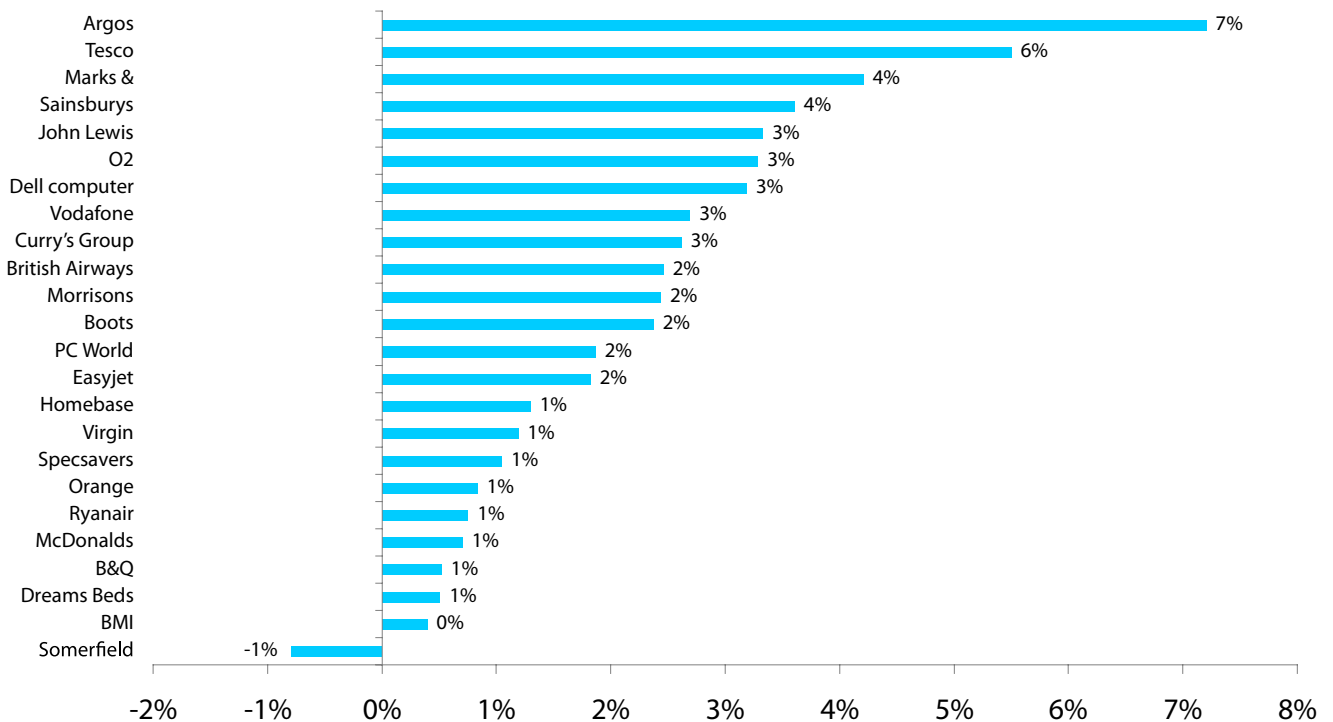
Comparisons through time are more valuable and it’s clear from Chart 10 that respondents **rate retail email more highly than in 2010**. This improvement mirrors the improvements reported in Chart 8 and offers further evidence that economic circumstances are lifting the perceived value of the promotional “money-saving” emails that are common in retail email.

Chart 10: Which industry sector do you think does email well? (2010 results)



When asked which of 24 top consumer-facing companies do email well, respondents reinforce the message that retail email in general has improved.

Chart 11: Which retailers do email well? (Difference in percentage points between March 2010 and August 2011)



Only one retailer saw their rating decline at all (and that by only one percentage point). Particularly strong improvements were recorded for Argos and Tesco. These gains in perceived email quality are despite drops in actual retailer use by respondents. Only Virgin, John Lewis and Dell were used by more respondents in August 2011 than in March 2010. Some of the drops in apparent use are quite dramatic: use of McDonalds, for example, fell by 15 percentage points or over 40%.

Chart 12: Which retailers do you use?

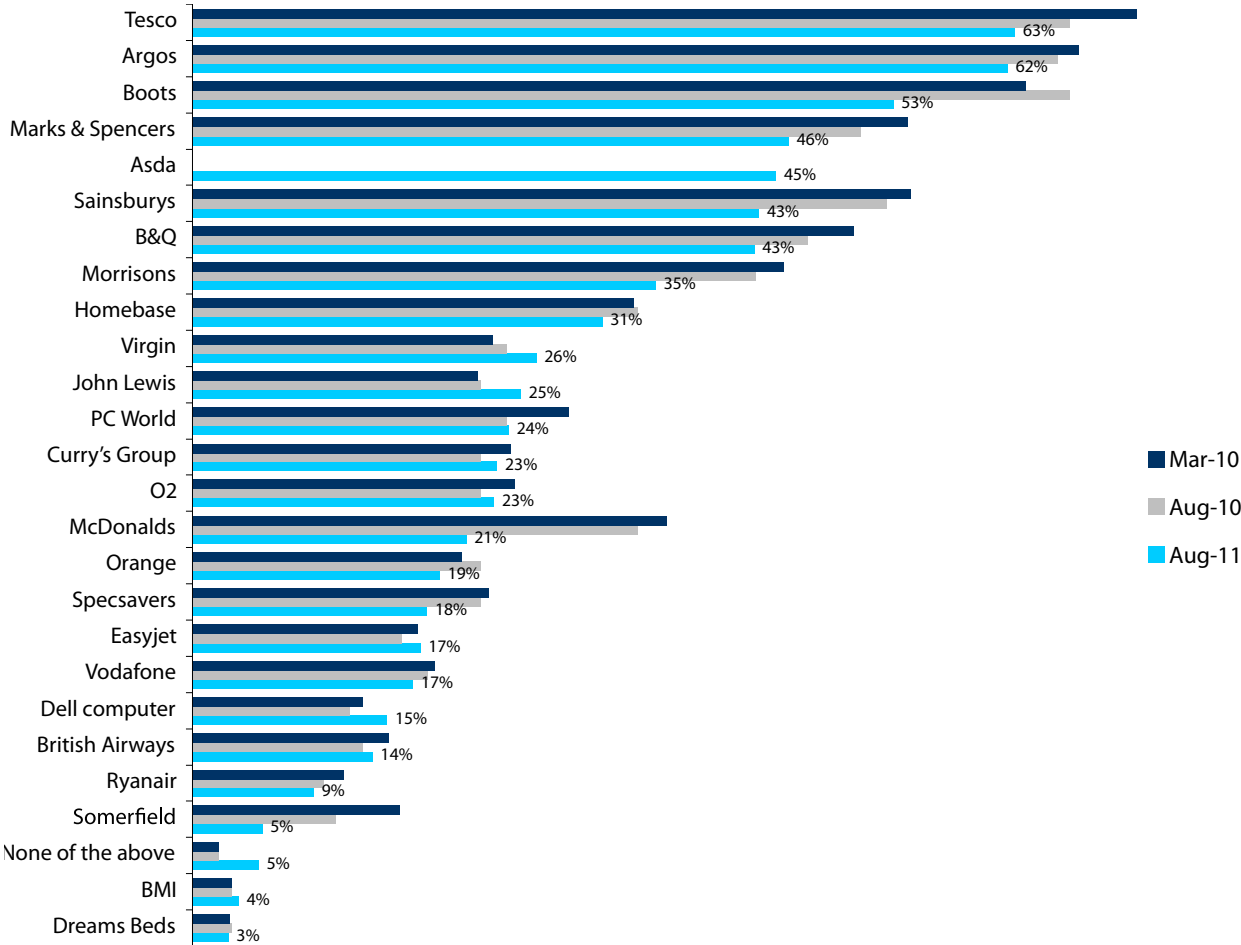
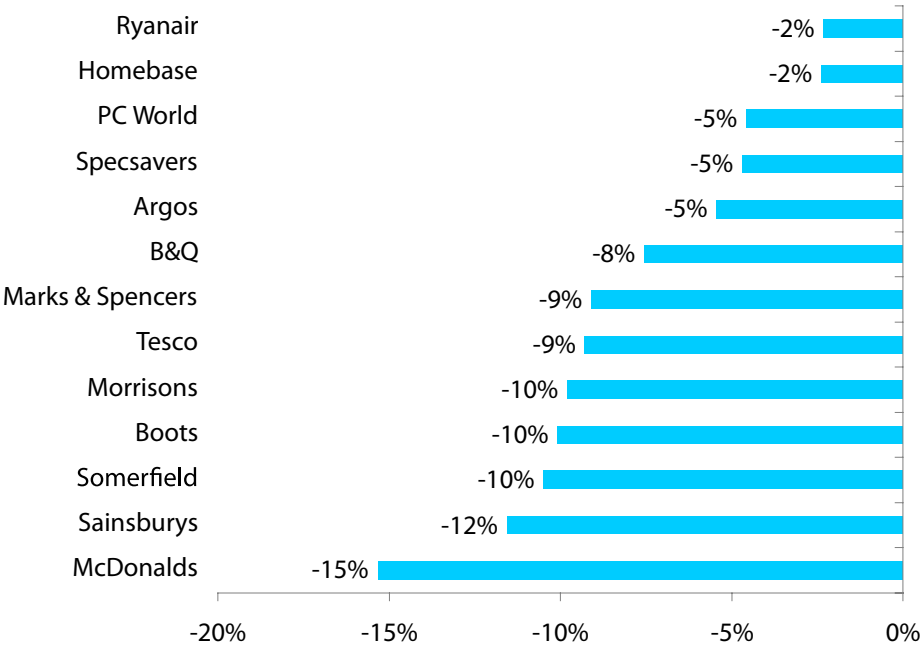
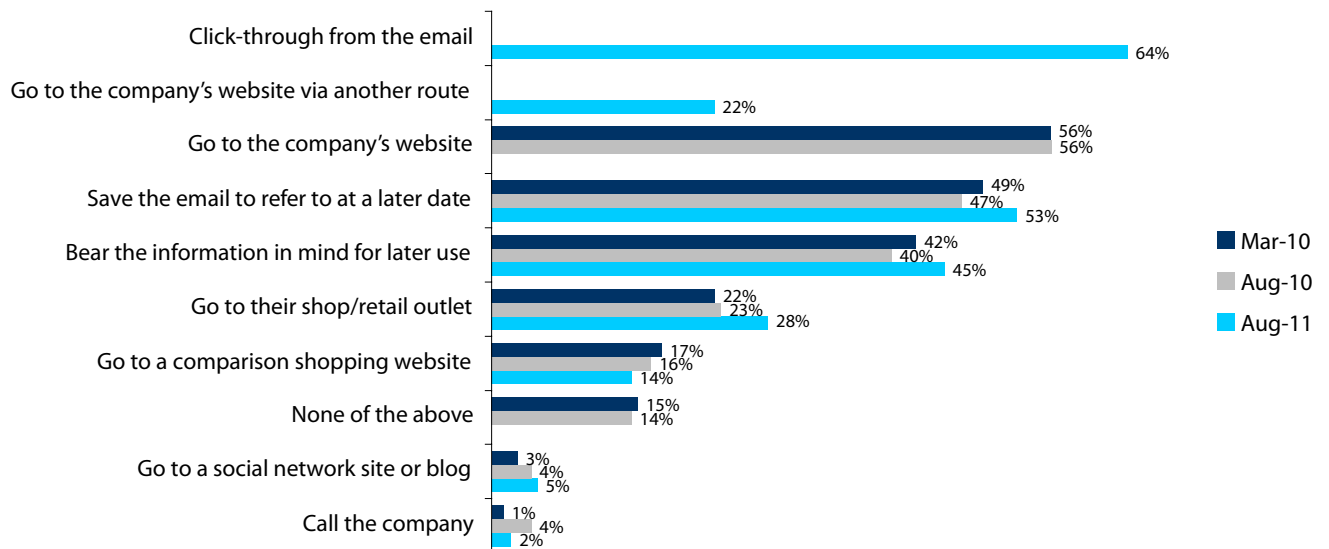


Chart 13 Which retailers do you use? (Top drops in use from March 2010 to August 2011, in percentage points)



If an email is interesting/relevant, the most likely response is, inevitably, a click to a landing page:

Chart 14: When you receive an interesting email, please select up to three most likely actions you would take from the list below



More interesting, however, is the vast number of responses that happen neither immediately nor through the medium of email. For example, 22% of respondents said they would visit the company website via another route and 45% said they would bear the information in mind for later use.

Most email marketers judge the success of a campaign on short-term results that are tied to an in-email response, e.g. open rate, CTR, sales tracked back to an email click. Chart 14 shows very clearly that this fails to capture a range of positive responses to the email.

There are three main implications of this finding.

First, email success or ROI is underestimated by most marketers. Alchemy Worx, for example, tracked⁹ purchases by email recipients and found a lift in sales from list members immediately following a send...including from list members who **did not interact with the email**.

Second, email design and content is commonly oriented to getting an immediate and direct response (open, click, conversion). Once the value of out-of-email response is accepted, then design and content strategies can be modified to account for this¹⁰.

Third, it changes how senders should define inactive subscribers. Typically, marketers will send "reactivation campaigns" to those considered inactive and/or discard them from the list. They fear unresponsive subscribers may eventually mark emails as spam or drag down engagement metrics possibly used by ISPs to define which folder the sender's emails get sent to.

These inactive subscribers are commonly defined as those who have not opened or clicked on an email over some defined period of time related to the nature of the sender's business. Chart 14 demonstrates that this definition of inactive would lead to senders discarding addresses from active subscribers...those who do respond, just not through the direct medium of email. The challenge, of course, is how to identify active subscribers when the response is not through an open or click.

What about reactions to "bad" emails? What causes respondents to mark email as spam?

Firstly, not everyone has ever taken such action. Just under a fifth (19%) of respondents had never, in fact, marked an email as spam. This number is unexpectedly high, given that every email client and webmail service has their equivalent of the "report as junk" button and anti-spam tool vendors regularly highlight how much spam is around.

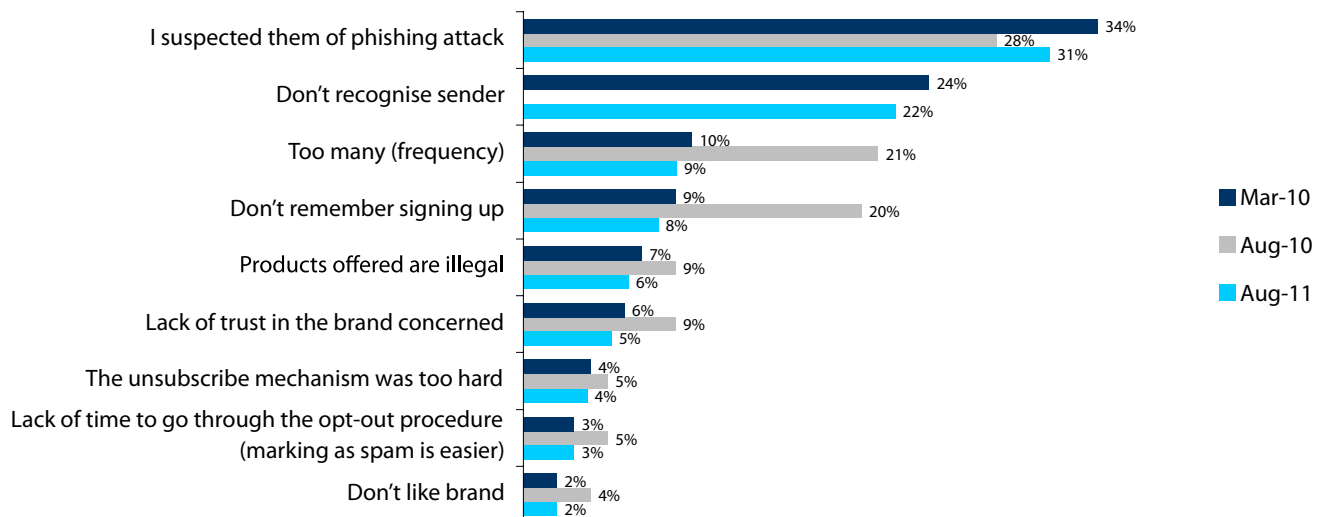
⁹http://www.alchemyworx.com/alchemy_worx/2009/newsletter/issue31/lp/lp1_the_nudge_effect.htm

¹⁰ See <http://www.smartinsights.com/email-marketing-ecrm-alerts/email-marketing-social-media-roi/>

Clearly some people simply do not see much (if any) spam in their inbox. The large webmail services in particular do an excellent job here, with spammers struggling to bypass reputation-based email filtering systems. Equally, the total volume of spam entering the email system declined across early 2011¹¹.

The interpretation of Chart 8 suggested end users may be distinguishing better between legitimate brand emails and unsolicited commercial email. Further evidence for this interpretation comes from the top reason given for marking email as spam.

Chart 15: What is most likely to prompt you to mark email as spam?



There is a clear shift in favour of “genuine” spam characteristics, like an unknown sender or suspected phishing mail, and away from email marketing practices, such as volume of messages. The number citing “too many emails”, for example, **dropped from 21% in August 2010 to 10% in the 2011 survey**. This is good news for permission-based marketers. However, there is no reason for complacency.

First, the lower emphasis on frequency as a reason for marking an email as spam may also stem from the fact that brands are sending fewer and/or better emails. It may only be perceived as an issue when it “becomes an issue”. Frequency itself needs to be seen in relation to value. **It’s rarely too many emails per se that are a problem, but too many emails that don’t deliver value**. One email a month is too much when the content is useless. One a day is no problem when the value is high.

Nevertheless, the 2010/2011 change confirms again (as we saw with Charts 2 and 3) that **over-mailing is probably not as pervasive it was once perceived to be**.

Second, respondents were asked about the **most likely** reason for marking email as spam, which means they may have picked the top one of several reasons. While, for example, too many emails may not be a **top** reason for marking email as spam, it may still be a reason. In the DMA’s 2011 Data Tracking Study¹², over half of respondents cited “irrelevant communication” and “over communication” as reasons for unsubscribing from marketing communications from a company they have a relationship with.

An unknown sender is clearly a characteristic associated with spam. But many legitimate emails can also fall foul of this factor if their mails do not contain enough recognition elements. The combination of subject line / from line / preheader / preview pane needs to contain words, logos, colours and designs that make it clear to the recipient who has sent the email. The from line is (obviously) particularly important here, especially on mobile devices where this from line often has far greater prominence than the subject.

Generic from lines like sales, office, info, marketing and service are particularly common on transactional emails, but should be avoided in favour of sender names featuring a brand, business or other name that is more recognisable. Personal names in the from field also tend to be unsuitable, unless clearly recognisable (e.g. a famous CEO, named brand character or the name of an account manager familiar to the recipient).

¹¹ See, for example <http://spamcop.net/spamgraph.shtml?spamyar> or <http://www.symanteccloud.com/globalthreats>

¹² <http://www.dma.org.uk/toolkit/fastmap-dma-data-tracking-study-2011>

4. Mobile email

A key issue in email marketing identified by many experts is the growth of mobile email use and its implications for both message design and email strategy. Data from the Digital Tracker survey suggests this growth is not as explosive as commonly thought: the number of respondents normally viewing email on a mobile or smartphone is still fairly low at 8%.

Chart 16: What device do you normally view your emails on?

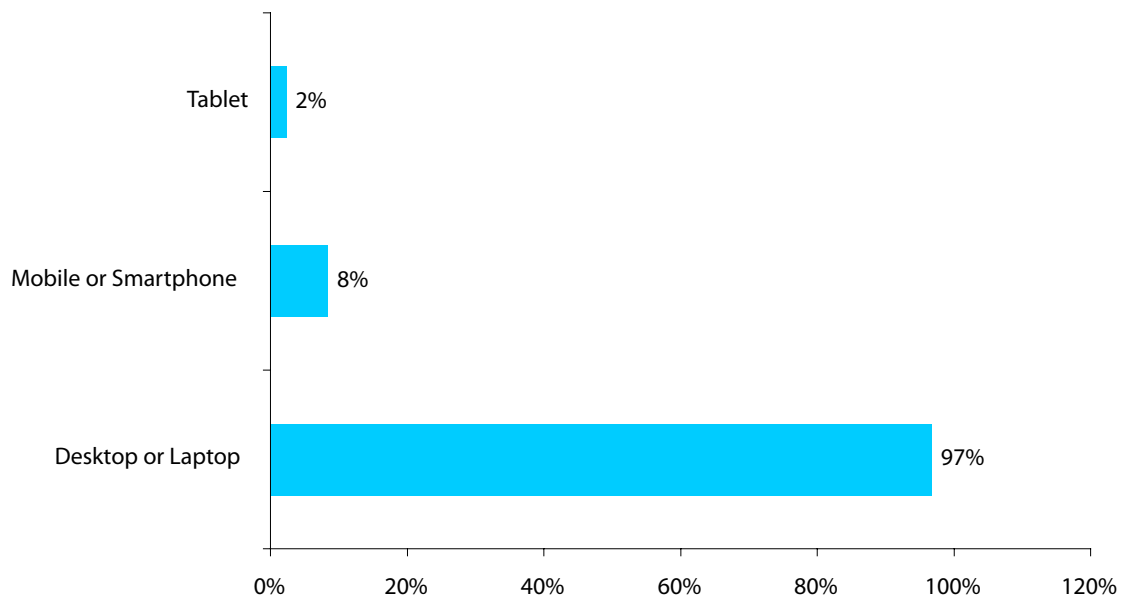
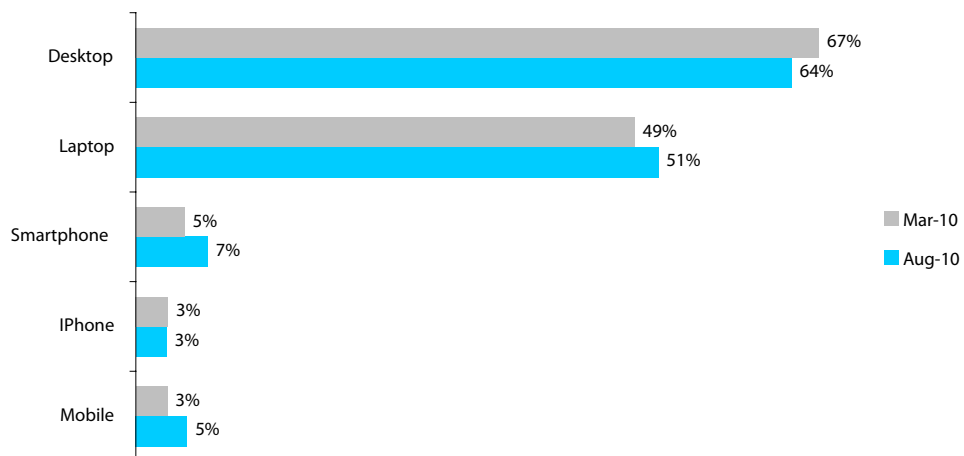


Chart 17: What device do you normally view your emails on? (2010 results)



The results are another reminder that the habits of technology- and web-savvy marketers are not necessarily representative of the wider email using population.

Indeed, given that only 3% of respondents wouldn't normally look at their emails on a laptop or desktop, it seems there is little urgency to develop a dedicated strategy for mobile email. This finding should not, however, distract marketers from developing such a mobile email strategy.

First, **mobile use may vary considerably between lists**. Those lists with a heavy B2B, technology or early-adopter bias may find mobile email use far higher than average. Email analytics services can provide data on viewing device, allowing marketers to judge the urgency of mobile email for their own particular situation.

Second, where regular mobile users can be identified, perhaps through a preference expressed on a sign-up form or through email analytics tools, **campaigns sent only to the mobile user with a design optimised for mobile viewing might drive higher responses**. This was the case for retailer New Look, where those who received the “mobile” email were three times as likely to open it as those who received an email on their PC¹³.

Third, respondents were asked where they normally view emails. Occasional viewing of emails on mobile devices **may be much higher**. There is anecdotal evidence to suggest this is the case. For example:

- comScore found¹⁴ 67% of UK smartphone users accessed email services on their mobile device in June 2011.
- According to Ofcom’s latest Communications Market Report¹⁵ for the UK, “over a quarter of adults (27%) and almost half of teenagers (47%) now own a smartphone”. Ofcom note that 15% of UK adults used their mobile phone to send/receive emails in the first quarter of 2011.

Of course, any urgency on mobile email also depends on how (or even if) people interact with email using their mobile. Traditionally, mobile email use has largely been limited to inbox triage: reading urgent, personal or business email, deleting unwanted email and saving the rest for when back at a PC or laptop.

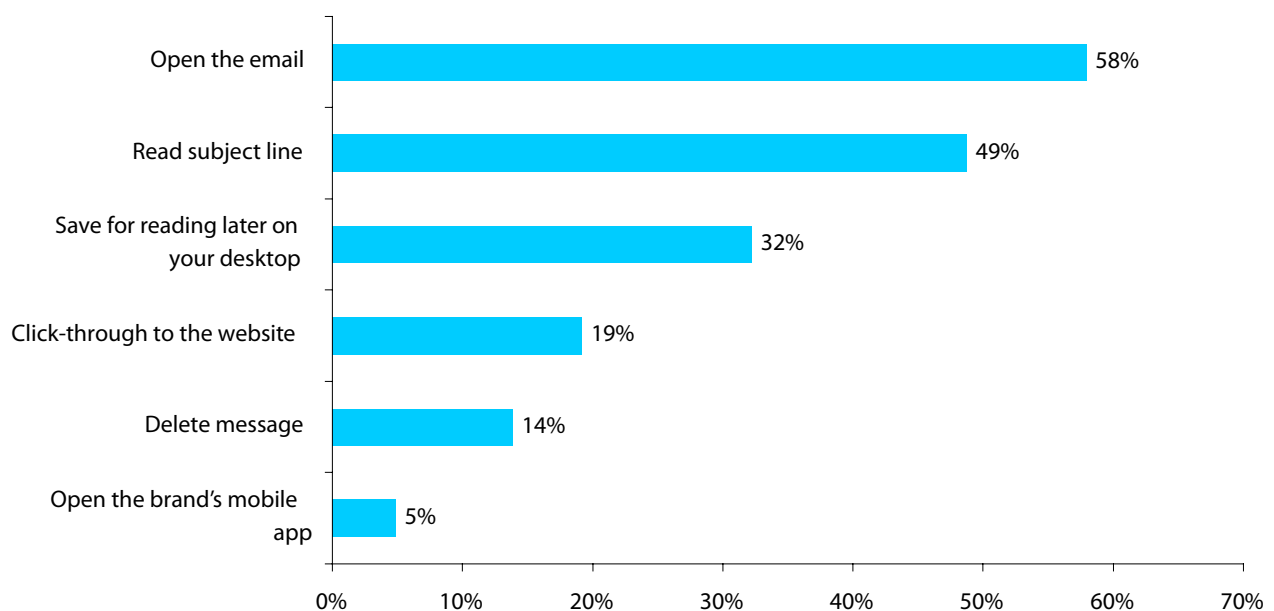
This pattern of behaviour is also changing. Almost 60% of those respondents who said they viewed emails on a mobile phone or smartphone said they would open a trusted brand’s message on their mobile device: 19% suggested they would clickthrough to the website.

As such, email marketers face several mobile-related challenges, including:

- Identifying mobile subscribers (difficult, since most people are likely swapping back and forth between desktop, laptop and mobile device)
- Designing emails that display adequately in various mobile and desktop environments, with particular attention to the problems associated with growing use of touchscreens¹⁶

Adjusting strategy to account for mobile email habits, particularly when and where emails are viewed¹⁷

Chart 18: What do you do when you receive an email from a brand you trust via your mobile?



¹³ <http://www.retail-week.com/technology/retail-bytes/how-mobile-improved-engagement-at-new-look/5028394.blog>

¹⁴ <http://www.comscore.com/2011/08/70-percent-of-male-smartphone-owners-use-email-on-the-go/>

¹⁵ <http://consumers.ofcom.org.uk/2011/08/a-nation-addicted-to-smartphones/>

¹⁶ See, for example, <http://stylecampaign.com/blog/?p=98>

¹⁷ See, for example, <http://dmaemailblog.com/2011/04/19/upwardly-mobile-email-for-the-mobile-consumer/>

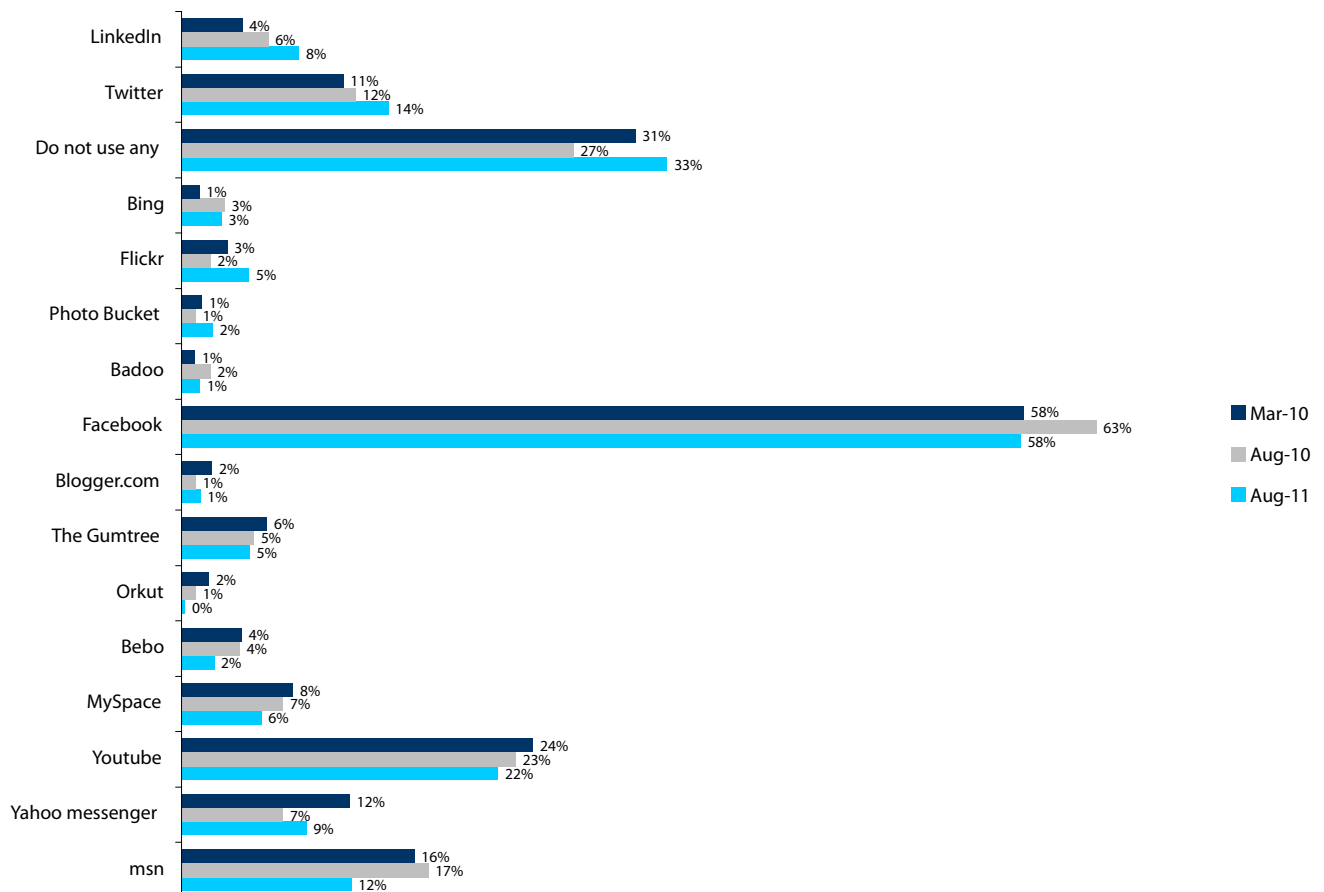
5. Email and social sharing

The debates around social networks and email have long shifted away from “social versus email” to how social and email can best combine. Various ideas continue to emerge, mostly focusing around:

- Using social networks to drive email subscriptions
- Using email to encourage social network followers and activity on pages “owned” by the sender
- Using “share with your network” (SWYN) links to encourage people to share email content/offers with their social networks
- Using content generated by one channel in another

The emphasis that should be placed on social networks in (email) marketing obviously depends on whether people use them. The 2011 survey reveals that while most respondents use at least one social network, **33% do not use any** (a small increase on the March 2010 figure).

Chart 19: Which of the following social networks do you use?



In general, **growth in social network use is stagnant**: more networks recorded a drop in use than a gain.

Only two networks recorded growth of more than two percentage points between March 2010 and August 2011: LinkedIn and Twitter¹⁸. Facebook use remained more or less constant at 58% of respondents, retaining its position as the (by far) most dominant social network.

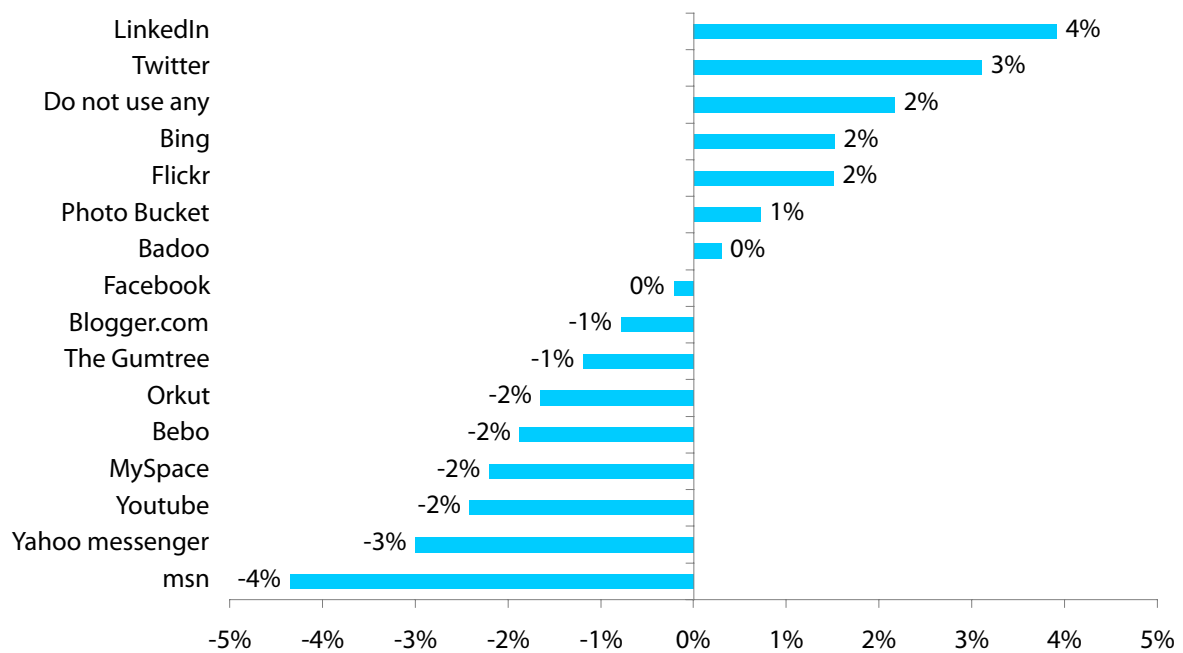
These numbers speak to the continuing advantage of email in terms of potential reach. Facebook has over 750 million active users¹⁹, a number exceeded by the combined account total of just the three biggest webmail providers²⁰.

¹⁸The Google+ launch was too late to be included in the survey

¹⁹<http://www.facebook.com/press/info.php?factsheet>

²⁰<http://www.email-marketing-reports.com/metrics/email-statistics.htm>

Chart 20: Which of the following social networks do you use? (Change in percentage points between March 2010 and August 2011)



Nevertheless, given their size, social sites like Facebook or Twitter are obvious candidates for social marketing investment. However, the statistics offer a warning to those promoting Facebook landing pages in their marketing or advertising, or those encouraging email recipients to visit / share content on social networks via in-email links or promotions.

Unless you can segment subscribers by social network activity, **you inevitably exclude a large chunk of the audience**: 42% of respondents do not use Facebook, for example. Possibilities for tagging subscribers with appropriate social network data include:

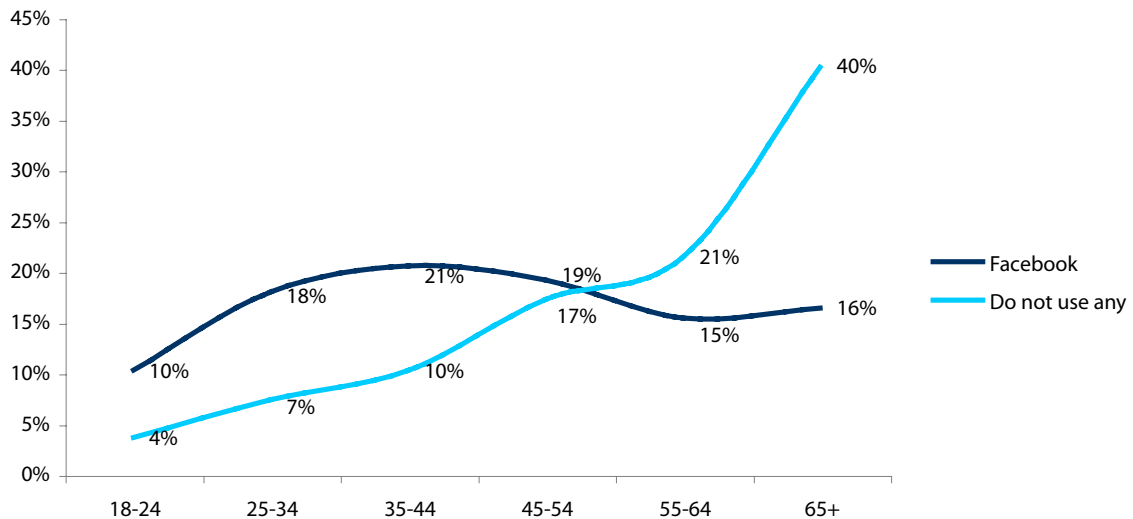
- Integrating social sign-ins to subscription forms
- Asking in preference centres and sign-up forms
- Integrating with existing customer data
- Third-party data appending tools
- Tracking clicks on social network links in past email campaigns
- Subscriber surveys

Of course, the relative potential of each individual network depends not just on its base size/reach, but also on other factors like suitability to the audience or campaign content.

A simple example might be camera retailers, whose customers are obviously far more likely to use photo-sharing sites like Flickr than the general population.

Chart 21 demonstrates how age impacts the likelihood of participating in social networks: 40% of the over-65s don't participate, but only 4% of 18-24 year-olds. A 35-44 year-old is over twice as likely to use Facebook than an 18-24 year-old.

Chart 21: Social networking age profile



Email and social marketing are different beasts, not least because of the kind of approach and content suited to each channel. Often, organisations will use social networks to interact with and engage customers, rather than take a direct selling approach. This reflects consumer preferences, where email is regularly revealed as the preferred channel for more commercial and transactional communications²¹.

These broad differences in what people expect from commercial organisations through different channels raise the issue of just how much company or product information people actually share with their networks.

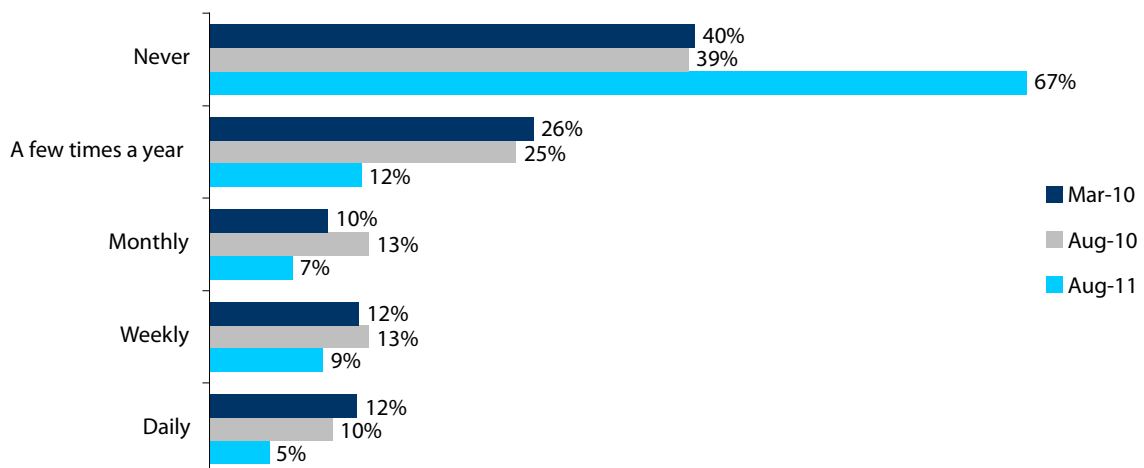
According to the Digital Tracker data, **67% share none at all**, a significant rise of almost 70% from 2010 results. This may simply reflect maturing use of social networks, where the novelty of sharing everything and anything has long faded.

Of course, a general lack of desire to **share** commercial information does not imply an unwillingness to **interact** with commercial organisations on those same networks. It does, however, suggest that organisations cannot rely on broad “social” word of mouth to spread commercial messages or information.

Equally, marketers should not dismiss the potential either: 5% of respondents did share company or product-related information on a daily basis, with another 9% doing so weekly.

Marketers can benefit in particular by identifying (by hand or using social analytics tools) two groups among their social audience: those who will share commercial information and those who do this but also have some kind of influencer status. These groups can then receive dedicated communications designed to encourage sharing. This approach may also transfer to email, where social sharing CTAs and associated messaging can be targeted at known social influencers on a list.

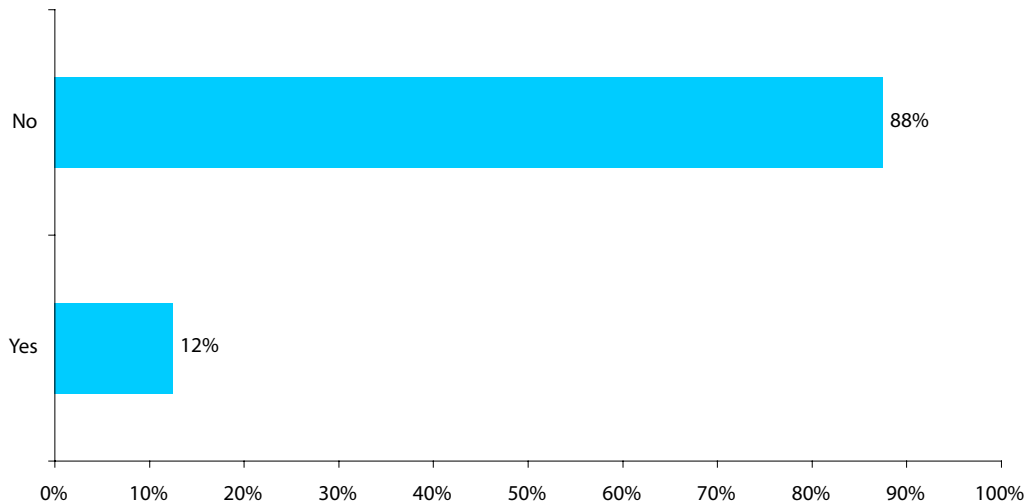
Chart 22: How often do you share company or product-related information on social networks?



²¹ See, for example, <http://www.merkleinc.com/news-and-events/press-releases/merkle-publishes-view-digital-inbox-whitepaper>

Social sharing (SWYN) links in email have received considerable attention from industry blogs and publications, with ESPs promoting new social tools that automate and track the sharing process. There is, however, little public data on response and sharing rates. Only 12% of survey respondents said they shared emails from trusted brands with their networks.

Chart 23: Are you sharing emails from brands you trust into your social networks?



This relatively low number suggests that while SWYN is a valid consideration, it does not deserve the blog/media attention it often gets. In fact, a survey²² discovered that the use of SWYN links in retail emails has actually dropped in 2011.

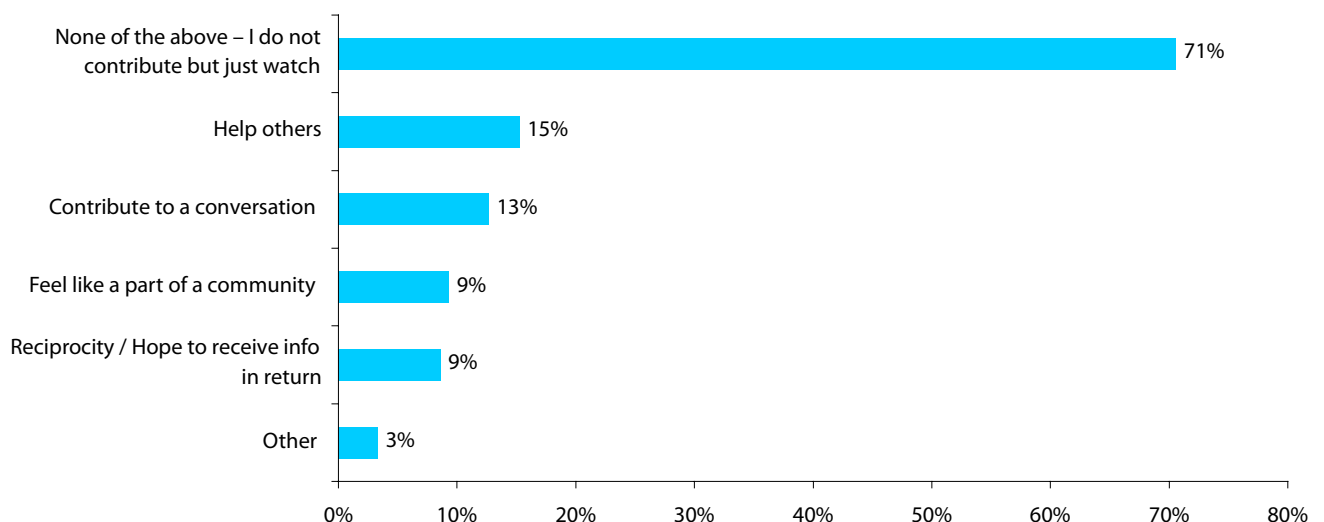
Most emails have a primary objective other than “being shared”. As such, SWYN links should not distract from the main call to action or get primary emphasis, unless in a dedicated campaign to promote social activity or targeted at known social sharers and influencers.

The focus in social sharing also needs to shift from the tools (SWYN functionality) to the motivation: the foundation of any sharing is having something worth sharing in the first place.

The top two such motivations identified by respondents were to “help others” and “contribute to a conversation”.

This does not exclude deals and offers as shareworthy material, but does suggest senders would have more sharing success with entertaining, useful or engaging content, such as contests, how-tos, photos, stories, humour, etc...

Chart 24: Why do you share emails into social networks?



²² <http://www.retailmailblog.com/2011/08/viral-community-links-in-email.html>



Methodology

- 17 questions were submitted via a self completion online survey to fast.MAP's nationally representative Consumer Voice panel
- Sample size: 2,261 (statistical confidence +/- 1.8%)
- Field work was carried out from 1 August to 8 August 2011
- Results were re-weighted by age and gender; data available for demographic analysis
- Panellists were incentivised by £250 prize draw



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