Sponsored by dotmailer EMAIL MARKETING

DMA Insight: Consumer email tracking study

2016

Contents

Introduction

While phone numbers and addresses are important to marketers, the central point of contact has coalesced around the email address.

Email is not just a popular channel for marketers to build and maintain relationships with prospects and customers, according to our research, it's also the channel that consumers prefer to receive brand communications through. On top of that, email addresses are the key to social media accounts, apps, web accounts and the 'single customer view' that marketers are so keen to develop.

Last year we painted a picture of email in robust heath, provided brands and agencies don't abuse their customers' trust.

Unfortunately, this year customers feel they have been subjected to too many emails, too many irrelevant emails, and too many emails from companies they don't recognise. Their faith in the channel has been shaken.

This is bad news for brands, for marketers using email and for the medium itself. We know that consumers like brand messages to be about them, for them and relevant to them.

Fortunately, there remains residual consumer goodwill towards email. Despite potential overuse of email by brands, consumers still recognise its intrinsic value and happily agree that a wide variety of tasks are 'best served' by email.

A special focus on younger consumers and so-called Millennials shows new behaviours emerging. It's a generation who are phone-first, savvy about what brands can offer them, but are happy to abandon email addresses that become unmanageable.

Marketers have to prepare and adapt to these emerging behaviours as they will be the norms of the future and help them prepare for new and emerging behaviours of the future.

Our annual snapshot is just that – a glimpse at the way consumers use email today. These behaviours are evolving as email and marketing evolve but to make sure your messages reach your audience and have impact, then please remember our mantra from the 2015 research: be interesting, offer real benefits, be mobile-ready, be multichannel and be creative.

Rachel Aldighieri
MD
DMA

Email council benchmarking hub perspective

Though the first ever email was sent in 1971 a perhaps even more significant anniversary occurred exactly 20 years ago with Microsoft's launch of Hotmail.

Now gloriously rebranded with the exciting moniker, Outlook – just in case you thought Windows 10 and Surface was seriously threatening Apple's hipster market share – a hyperbolic evolution has occurred since the American company arguably kickstarted the biggest adoption of email in the medium's history and a significant proportion of the people grabbing an account then, have hung onto it today, (as this research shows).

This latest consumer email research from the DMA illustrates not only areas that would have seemed like science fiction – "I can buy stuff from an email sent to a box I keep in my pocket – whilst on the Tube!?!" but also how basic terminologies have twisted in the fierce technological wind blowing in the last two decades: the beast that was spam in the 90s is certainly not what it is today and this report shows Consumers have altered their perceptions accordingly.

Where once unwanted Viagra offers clogged their inbox, successful spam filter technology has instead diverted the consumer to the "legitimate" marketer's attempts to grab your attention. With 38% saying they receive more than 41 messages from brands per week, email fatigue is a growing problem.

Email has been transformed and as a medium continues to do so at bewildering speed: marketers can send heretofore unimaginable volumes, personalised to the nth degree with offers somebody in sales came up with that morning straight to a device at a time designed to land at the precise moment the prospect goes for their cigarette break to talk about that holiday they were thinking of going on and – "ooh: I've never been to Mexico: that looks amazing…"[*open, click, buy, promotion to Head of Marketing*].

Yet with this amazing power - to reclaim a phrase – comes amazing responsibility: catch that person at the wrong time or on a dormant account (nearly half our respondents), with a beach holiday suggestion when you know they said they preferred city breaks having tried to get them to buy car hire 10 times that week and it's just as easily [*don't open, don't click, don't buy, unsubscribe, P45…*]. The good news is email is still the dominant, most effective form to talk to consumers. They like it, (mostly) trust it and more importantly buy stuff using it. Even if it's true the number of people who think their email content is interesting or relevant has halved in the last five years you don't have to be the Marketer making them think that. If the brand provides the expected value once a consumer has exchanged their email address you won't lose their interest.

Email can and should still be cool – and don't let Microsoft make you think differently.

Marcus Gearey
Analytics Manager
Zeta Global & Chair of the DMA Email Benchmarking Hub

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Lead Digital Marketing Strategist
Communicator & member of the DMA Email Benchmarking Hub

Sponsor's perspective

If I had a pound for every time some 'expert' said that email is dead, I would be writing this intro from a warm beach rather than rainy London. Year after year we hear that email is dead or dying and year after year the stats show that email is going from strength to strength.

Consumers across all age groups regularly call out email as their preferred channel for maintaining relationships with brands. Similarly, marketers prefer email as it delivers the highest ROI of any channel.

That said, this report should resonate as our recipients launching a shot across our bow. Some of the stats in this year's tracker report are difficult to read. We are not delivering on our promise of delivering targeted relevant messages in all cases. In a bid to push out more content and cut through the noise, brands appear to be alienating their customers.

This study highlights that consumers still see the value in email and prefer it as a marketing communications medium; however, if companies continue to 'abuse' it, it may no longer be viewed as favourable.

It is time for brands to truly understand their customers' wants and needs, and then leverage the potential of the technologies available to them. With easy-to-use email segmentation, marketing automation and personalization tools widely available, there is no excuse for brands to continue blasting their contacts with inappropriate content.

We hope, as ever, that you find this piece of research useful and as insightful as we do.

Skip Fidura
Client Services Director
dotmailer

Executive summary

1. Almost half (45%) of consumers have 'ghost' accounts that are active but no longer used, which translates to at least 19.5 million ghost accounts in the UK alone
2. Only a small minority of consumers say that a variety of brand activity is not 'best served' by email, with 65% saying they would click through to buy from an email, up from 58% last year
3. The top reasons for consumers to share their details with brands are money off discounts (for 45% of the total), % discounts (for 41%), free samples and free delivery (both for 35%)
4. Consumers use smartphones to access email more for every measure compared to last year, opens increasing from 25% to 40%. One third (31%) said they used smartphones as the main device to click-through and buy. For younger people, including 'Millennials', the smartphone is the primary device for accessing emails, overtaking desktop use which is the norm for older consumers.
5. 62% have abandoned an email address or would consider doing so because of receiving too many emails. Younger people are more likely to have abandoned email addresses due to too many emails (58%) compared to older consumers (27%).
6. While almost half (48%) of consumers say they receive messages from between six and 20 brands, two-thirds (68%) of consumers 'agreed' or 'strongly agreed' with the statement 'Most of the emails from brands/shops/sites I receive include no information of offers that are of interest to me'. Three quarters (74%) of emails are deleted after one day in any inbox.

1. Email use in 2016

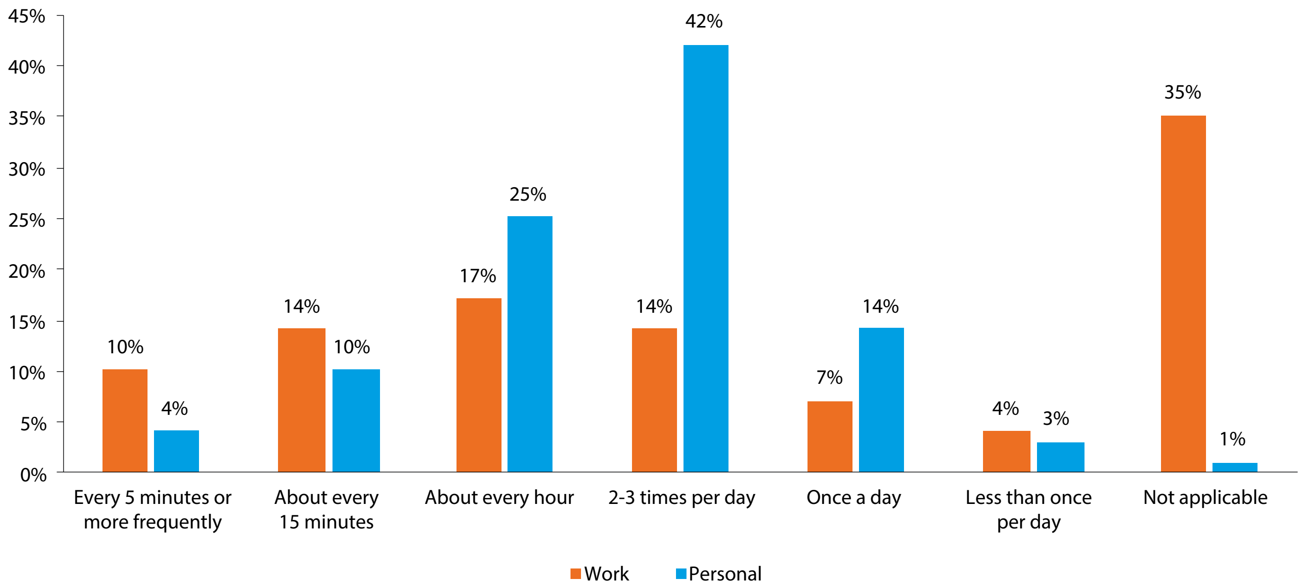
Email remains an essential part of every consumer's day. Not just a part of their digital day, it is as much a part of their daily routine as brushing their teeth.

According to our research, consumer email use has increased compared to last year, and it remains an activity predominantly conducted at home, with just 2% of people not using email at home. Three quarters (74%) of consumers use email at home for up to two hours per day with 91% using email at home for up to four hours per day.

At work those using email has increased from 45% to 59% of the total, a 31% increase compared to last year.

In 2016 we began to measure those who use email 'on the go', meaning those who use email while out and about, usually on a smartphone and while commuting. This has risen from 50% to 51% of the total since last year, with the majority of those (44% of the total) accessing email for up to two hours per day 'on the go', although younger consumers gravitate strongly to the smartphone (see section on younger consumers below).

How often do you check your email inbox?



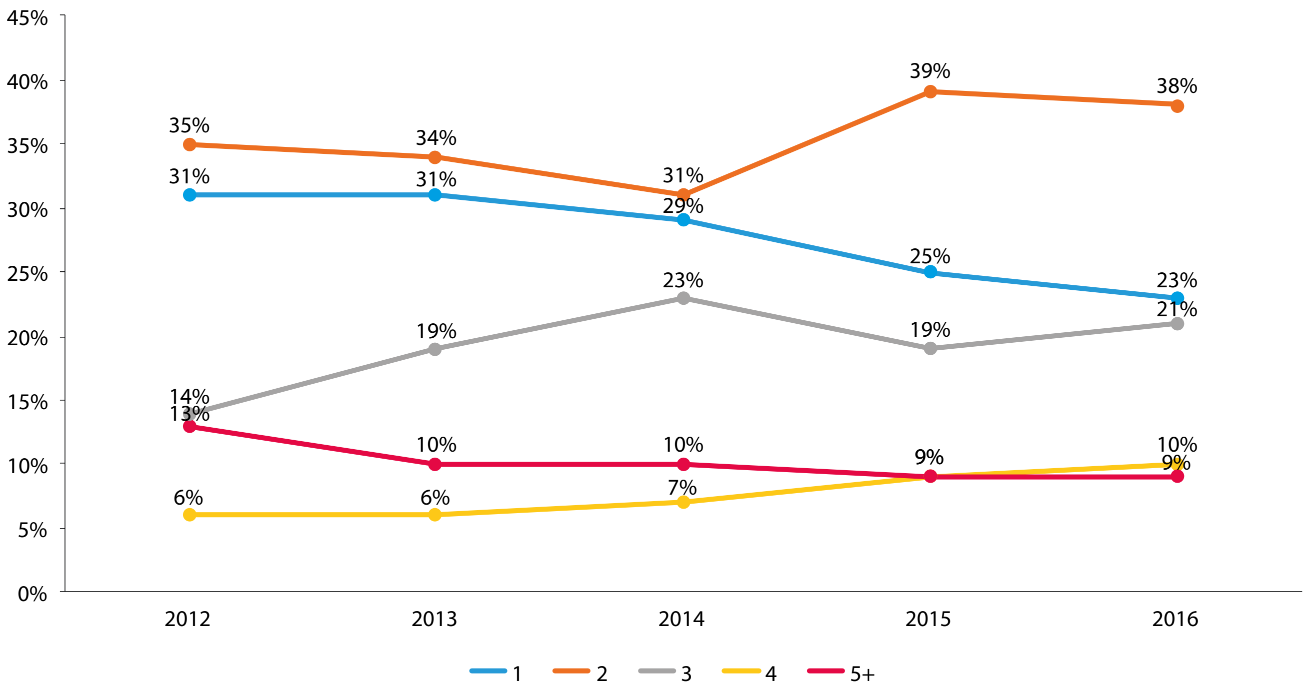
When looking at how often consumers check their email during the day, the split between work and non-work is significant according to our representative sample of the UK population. It's easy to imagine most people at work checking their email regularly, but many are unable to do this. For example, if consumers work for the NHS or drive for a living then email may not be readily accessed and many service jobs do not have email at all.

More than one third (35%) said frequency of checking email was not applicable to them, presumably either because they cannot easily check their email at work or because they don't have work email.

For those that do use email at work, more than two in five (41%) check their inboxes hourly or more frequently. A quarter (25%) check their inboxes less frequently than that. At work people monitor their email diligently and regularly where possible.

For personal email the pace is more leisurely. Those checking their email every five minutes or more frequently drops to 4%, with 42% checking two to three times per day, up from 40% last year. The majority of consumers dip into their personal email sporadically.

How many email addresses do you have?



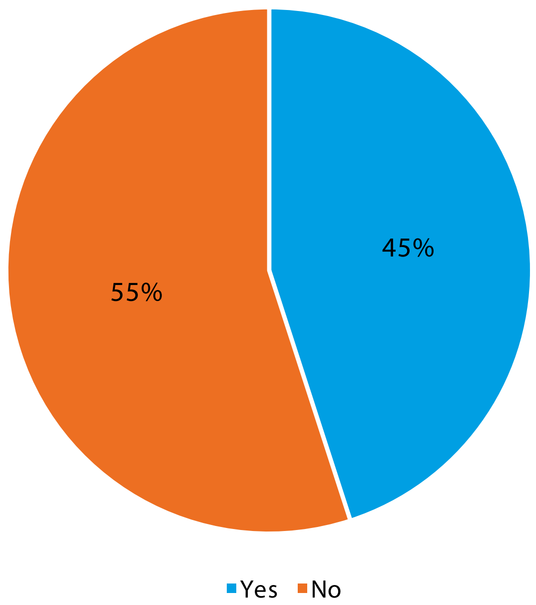
People generally have a couple of email addresses, although this includes both work and personal email addresses. The proportion with just one email address continues to fall, while those with two email addresses remains the most popular response (38%, down from 39% last year). Those with three or four addresses have increased to 31% from 28% last year.

This pattern makes life more difficult for marketers, with consumers using different addresses for different purposes, making a single customer view more difficult.

2. 'Ghost' accounts

Marketers know that consumer email accounts lie dormant. This could be due to switching accounts to another supplier, setting up a compulsory new account when you join a broadband supplier or abandoning accounts that become unmanagable or undesirable. Marketers do need to maintain good list hygeine and root out unused accounts. The *DMA's email marketing council best practice guide*[1] can help.

Do you have any personal email addresses that are inactive/you don't use anymore? E.g. old email addresses, or email addresses given to you when setting up broadband.



We reveal that close to half (45%) of consumers admit to having live but dormant 'ghost' email accounts they no longer use. Those ghost accounts will continue to receive marketing messages. Despite 79% of respondents using special accounts for marketing messages, a significant number of additional ghost accounts remain in circulation.

In 2014, the Office of National Statistics[2] estimated that 87% of the adult population, or 43.5 million people, used the internet. If we assume all of these users use email then a rough rule of thumb would indicate that 19.58 million people have at least one 'ghost' account in the UK.

This is significant because it shows that marketers are highly likely to have ghost accounts on their databases.

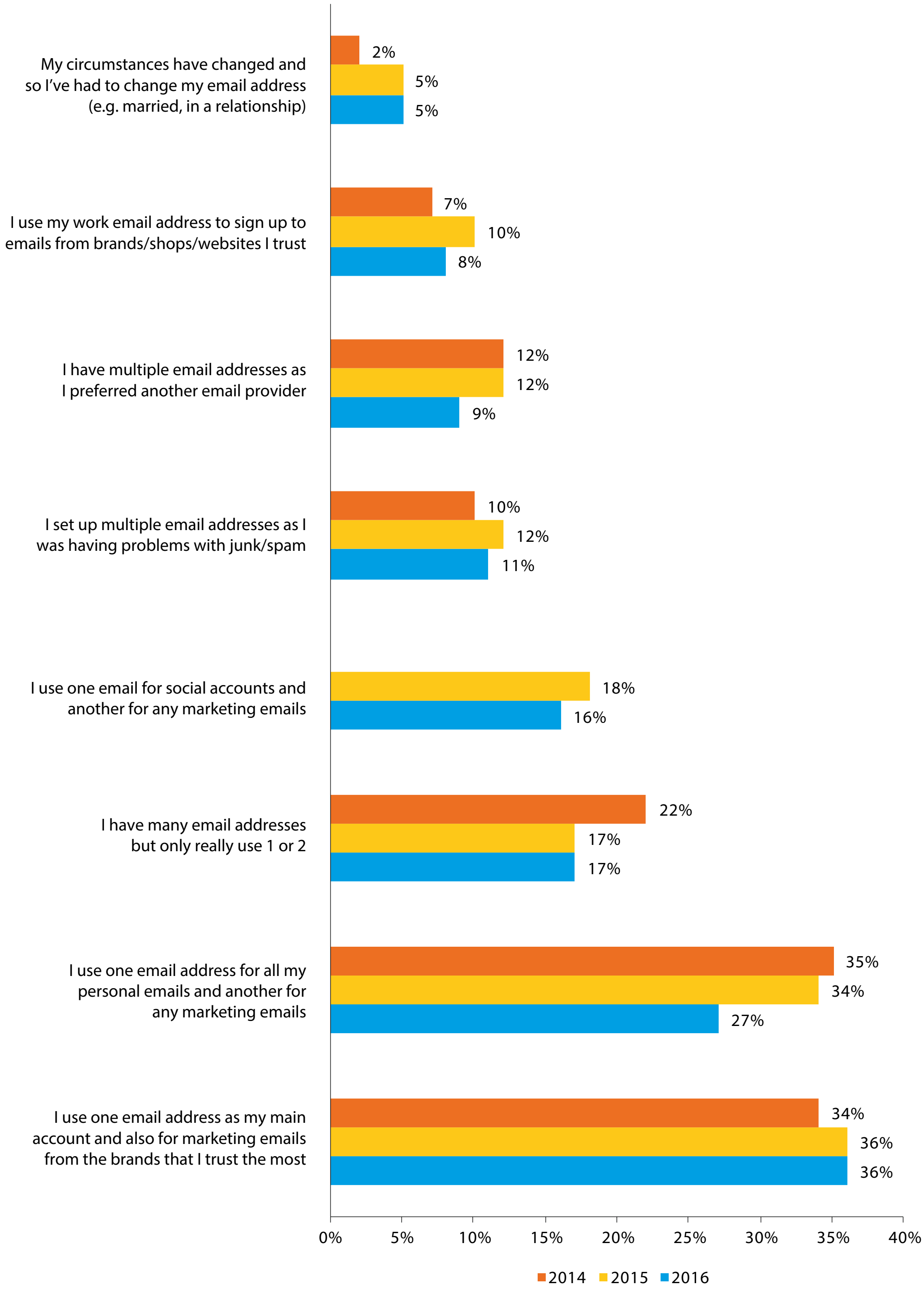
Consumers take time to manage their inboxes as described in detail in the *Consumer Email Tracker 2015*[3], which includes using multiple accounts.

As almost half of consumers have at least one ghost account in addition to active and tactical accounts then marketers have to work hard to root out these ghost accounts.

1. DMA's email marketing council best practice guide: https://dma.org.uk/uploads/NEW_email_18%20July_53c8d94d437ea.pdf
2. Office of National Statistics: http://www.ons.gov.uk/peoplepopulationandcommunity/householdcharacteristics/homeinternetandsocialmediausage/bulletins/internetaccesshouseholdsandindividuals/2014-08-07#tab-Computer-and-Internet-Use
3. Consumer Email Tracker 2015: https://dma.org.uk/research/three-reasons-you-should-look-again-at-your-email-campaigns

3. Tactical accounts

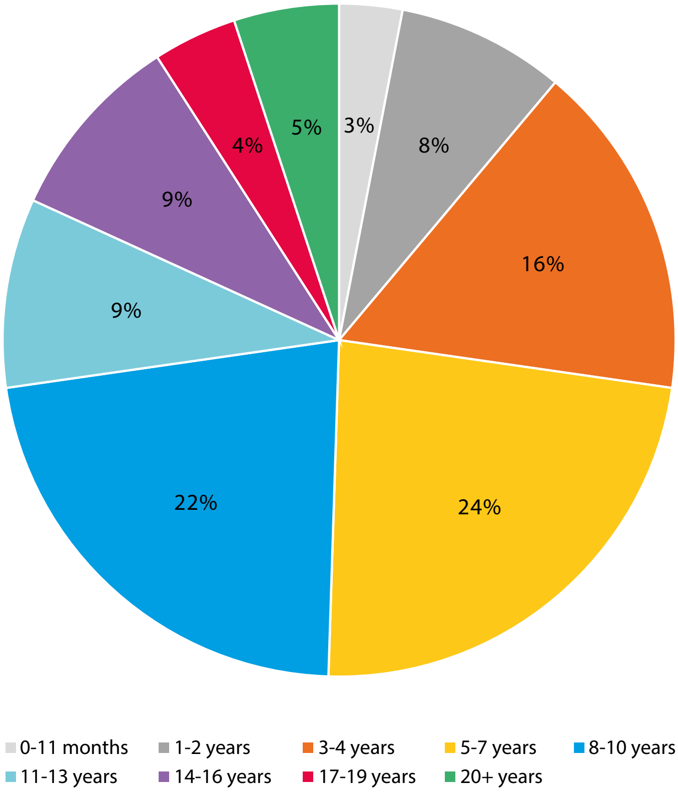
Most consumers have more than one active email address, but with a significant minority (36%) continuing to use a single address for both marketing and personal emails. Anecdotally, we understand that marketers assume that the proportion of email users who use a single account is well below 36%.



Those choosing two email addresses, one for personal emails and another for marketing emails, had dropped from 34% to 27% of the total since last year's research.

As the bulk of consumers use more than one email address, as described above this situation creates problem for those keen to develop a single customer view.

How do you use your different email addresses?

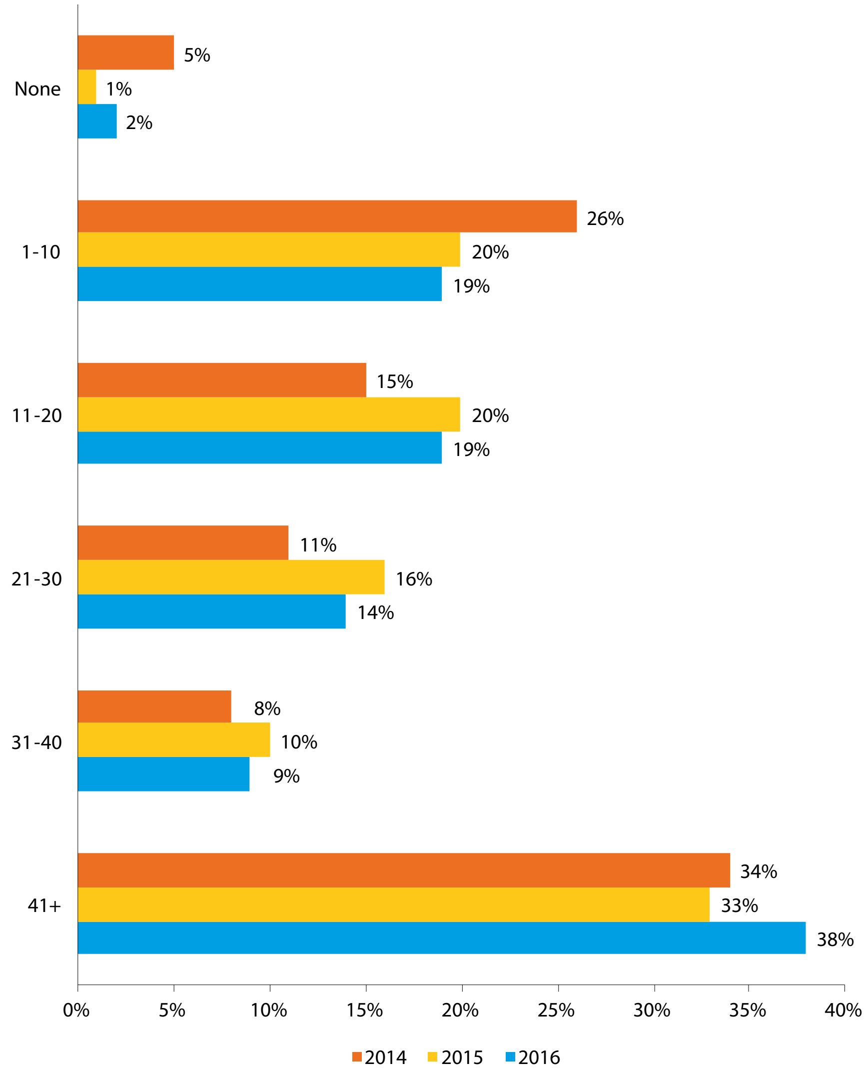


Consumers hold onto their email addresses for a significant period of time, with more than a quarter (27%) holding their address for more than 10 years and one in 20 retaining their email addresses for 20 years or more.

With the first major web-based service, Hotmail, founded in 1996 (Yahoo! mail launching the following year), this shows the early adoption and continuous use of email. Many others would have later acquired email addresses when signing up for broadband or other services.

4. More messages, fewer relevant messages

Consumers claim to receive more emails then in previous years. Almost two in five (38%) say they receive more than 41 messages from brands per week, up from 33% in 2015.



Correspondingly, those who said they received fewer messages reduced across the board. Consumers say they receive more emails than ever before.

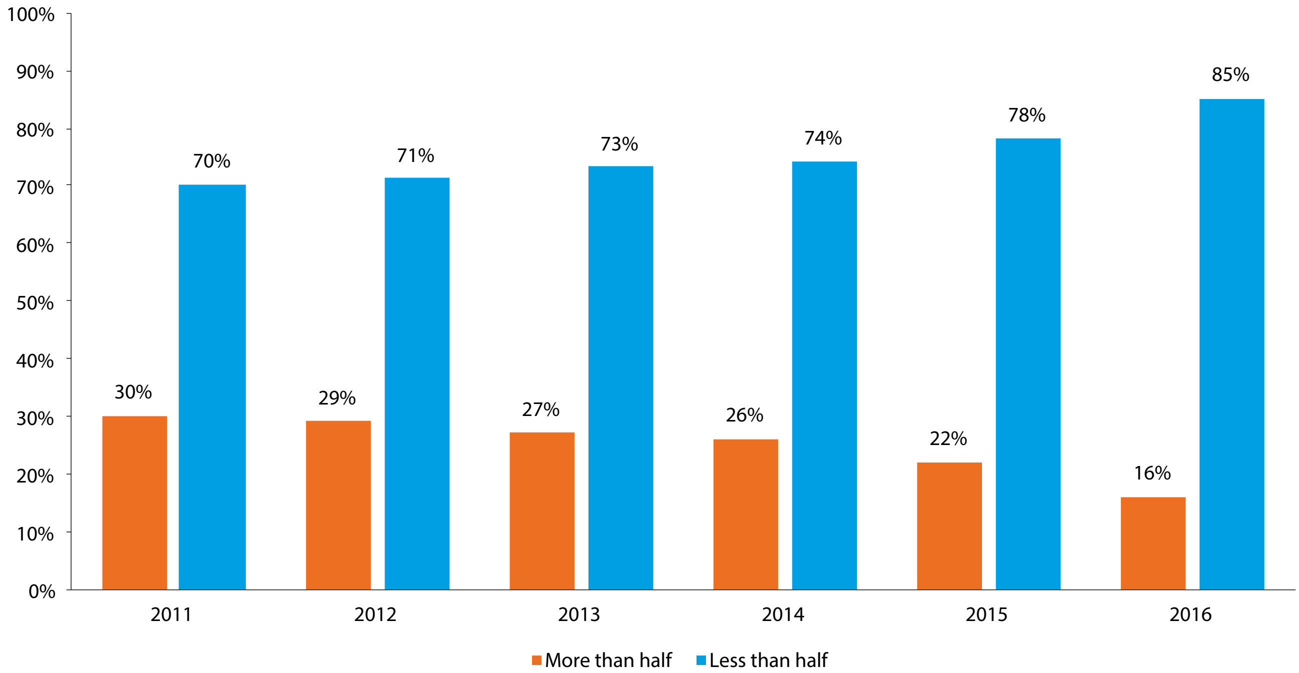
We asked consumers how many brands they signed-up to. The responses were banded making averages difficult to work out but we estimate that brands will sign-up to between 14.6 and 16.2 brands each. [NOTE – Estimate based on what the average number of brands would be for those who selected 31+. If we say 31 then the average is 14.6. If we increase this to 45 them the average is 16.2].

If brands send an average of 3.72 emails to each consumer per month (*DMA Marketer email tracker 2016*) then this translates to between 54 and 60 messages per month, or 13 to 15 marketing messages per week. 61% of respondents claim to receive 30 or more messages per week.

Consumers perceive that they receive more messages than brands send, on average, indicating that either consumers have signed up to more brands than they can remember, they overestimate how many messages they receive, or the mistake other messages for marketing messages.

Marketers are waging an increasingly competitive 'battle for the inbox' against rival brands for the attention of consumers, and against the consumers themselves who are increasingly savvy, using a variety of different strategies to minimise the messages they receive (see *DMA Consumer Email Tracker 2015*).

What percentage of the emails that you receive do you consider interesting or relevant to you?



The proportion of consumers who say they find more than half of messages 'interesting or relevant' has declined to 16%. This proportion has declined steadily over the years and stands at almost half the figure reported in 2011.

Those 84% of consumers who said they found less than half of their emails 'interesting or relevant' shows the huge volume of waste email accumulating in inboxes, whether active or ghost accounts.

The *Consumer Email Tracker 2015* warned that email works as an effective medium for as long as it is trusted. Clearly, email marketers are not heeding these warnings.

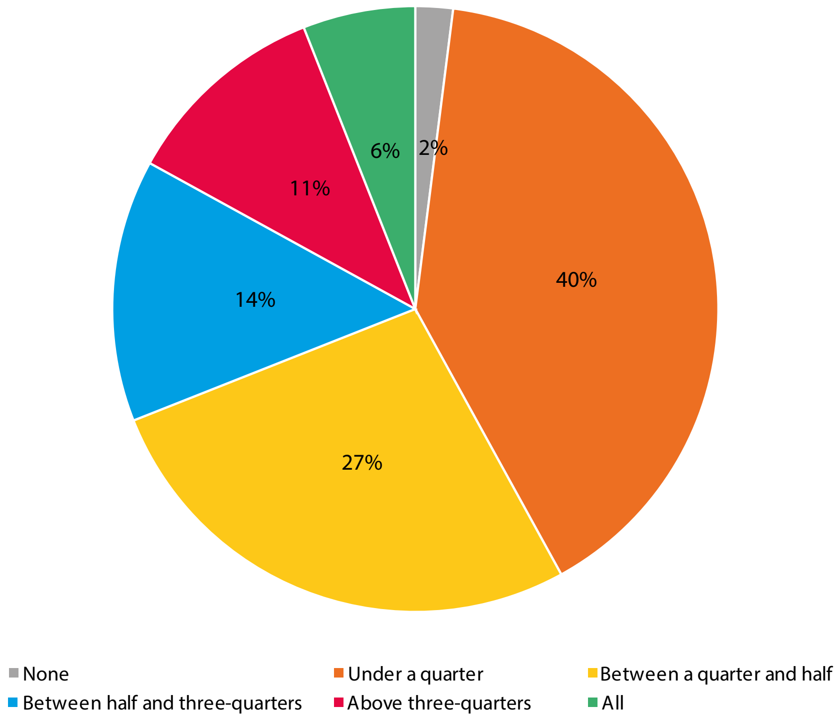
According to this year's results, fewer consumers receive consistently relevant or interesting mails, and this should be seen as a warning for marketers to raise their game and make sure emails are sufficiently interesting and well targeted to make sure consumers maintain trust in your brand.

Should this trend continue, consumers may decide to move to other channels.

5. Consumer dissatisfaction with marketing

As we discovered last year, consumers receive more emails, but more irrelevant emails. Consumers have a weak affinity for brands, shown by those who do not remember signing up to receive emails in the first place.

What proportion of emails do you think you open and read the full email?

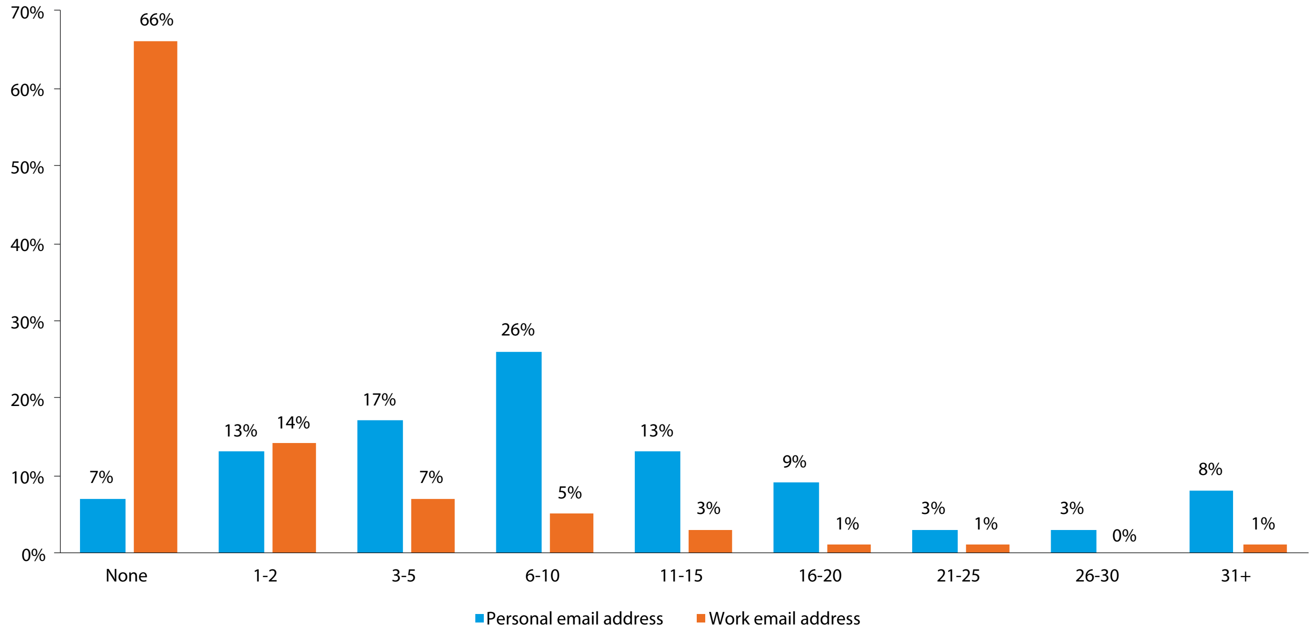


Consumers' attention spans are low. Few consumers open and read all their emails, only 6% saying they did this in 2016. Two in five (40%) said they opened and read fewer than a quarter of the emails they received, rising to more than two thirds (67%) who read fewer than half of their messages. Perhaps this is unsurprising, considering consumers' perception that the majority of the emails they receive are irrelevant.

Fewer than one third of consumers (31%) open more than half their emails, but as 84% find less than half of the emails their receive to be irrelevant, this group is regularly disappointed by what their find, which will explain the increasing dissatisfaction with email.

Brands clearly need to work harder to appeal to consumers and persuade them to open and read their emails. If email becomes the channel perceived to be a stream of irrelevant information, then this will be bad for the marketing community.

How many brands/shops/sites are you currently signed up to receive emails from?



Consumers generally use their personal rather than work email to sign up to brands, with more than a quarter (26%) signing up to between six and ten brands, but 8% signing up to more than 31.

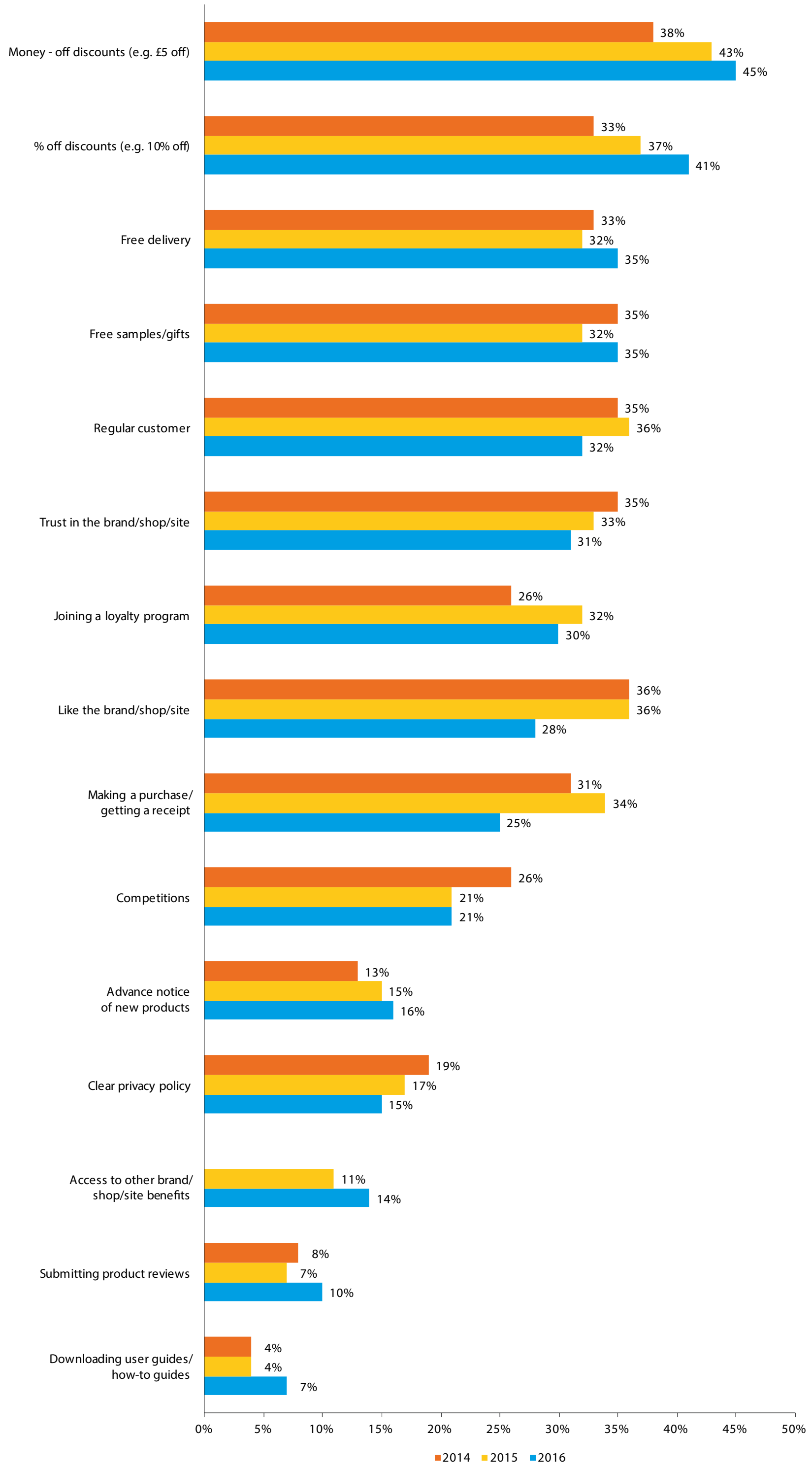
For those using their work emails, 66% do not sign up to any brand, but 5% sign up to between six and ten brands. Work emails are used to track brands sparingly. Those opting to follow a brand using their work email address may value that brand highly.

Of the brands consumers say 'do email well', almost one in five (19.4%) of those who named a brand named Amazon. EBay (8.7%), Tesco (5.4%), John Lewis (2.8%), ASOS (2.9%) and Asda (3.1%) also feature prominently, but Amazon remains the star performer.

Amazon has always been an online business, despite some experiments with bricks and mortar stores. Business touchpoints remain the website, app and email. This is also true for ASOS, but Amazon's breadth of products, now including food, mean the store retains very broad appeal, hence the wide admiration.

When asked what consumers mean by 'did email well', the top reasons are 'interesting' and 'relevant'. In email body, consumers like pictures and text equally, with other add-ons of more marginal interest.

What persuades you to give your email address to a brad/shop/website?



As last year, money-off discounts and % discounts remain the top reasons for consumers to share their email address with a brand, both increasing compared to last year to 45% and 41% respectively from 43% and 37% last year. Free samples and free delivery were also popular, both increasing from 32% to 35% compared to 2015.

Consumers remain attracted to discounts, clearly still love a deal, and are savvy about using their data to secure a deal.

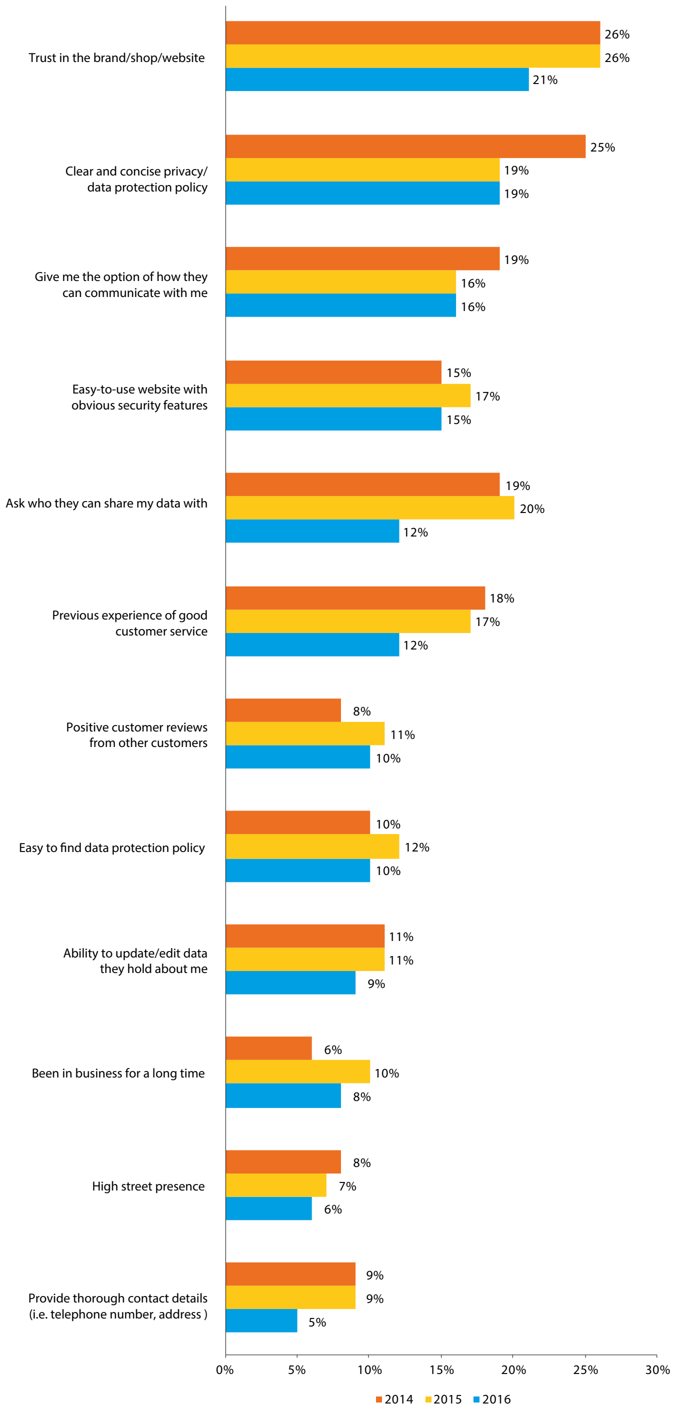
This is mirrored in what consumers like to receive from brands once they have signed-up, with money off favoured by more than half (51%) and %-off discounts by 50%, followed by free samples (43%) and free delivery (38%).

Consumers are less interested in 'content', with the exception of newsletters (of interest to 19%), which shows marketers should take care to ensure that emails are relevant to the recipient. However, this finding contrasts with those from the *Marketer email tracker 2016*[4] research, which showed that marketers rated 'exclusive content', 'new product notifications' and 'user guides' as their top drivers to meet their campaign objectives.

While consumers say they dislike content, marketers say it works. Reasons why a consumer will share their email address with a brand fell significantly since last year, in particular those who simply 'like the brand', which fell as a measure from 36% to 28%, and those who are 'making a purchase', from 34% to 25%, which suggests that loyalty may be waning amongst consumers, or that loyalty holds less allure than in previous years.

Both of these decreases should be of concern to marketers. If consumers are dissatisfied with the messages they receive, they will be disinclined to sign up to further messages or unsubscribe, and we have some evidence to show this is already happening (see below).

Which of the following options are most likely to convince you that a brand/shop/website will handle your personal data responsibly? Please select 2 answers only



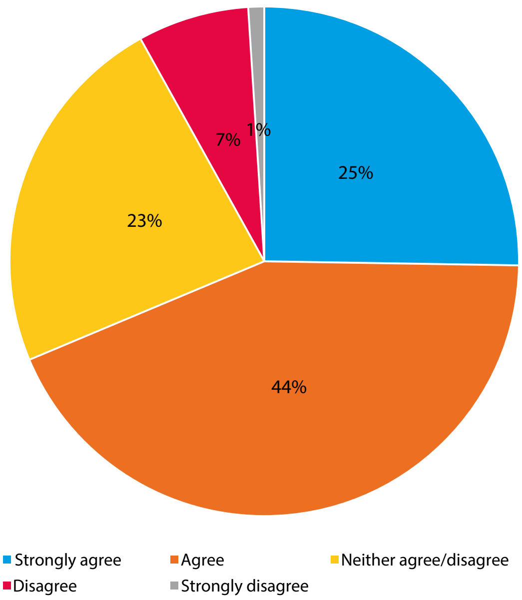
4. Marketer email tracker 2016: https://dma.org.uk/research/marketer-email-tracker-2016

Consumers are less likely to be convinced that a brand, shop or website will handle its data responsibly compared to last year, with numbers down across every measure except 'clear and concise data protection policy', which remained unchanged.

This finding mirrors results from the *DMA Data Privacy: what the consumer really thinks 2015*[5] research, where consumers were found to have privacy expectations that brands are failing to meet. Those brands that meet these rising expectations should expect to stand out. Trust will be a key differentiator for consumers.

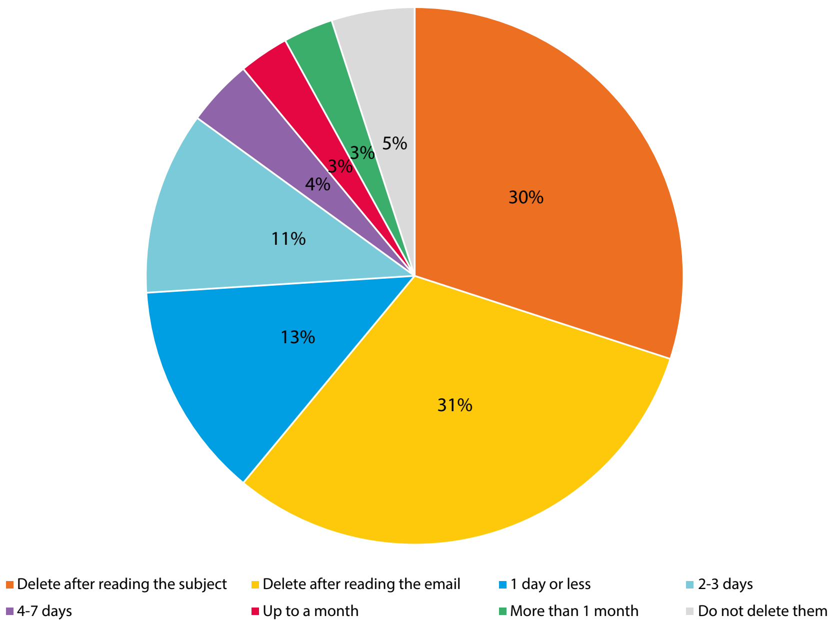
Declining trust by consumers reflects bad news about data breaches and hacks, such as those experienced by Yahoo! or Talk-Talk in the past year, in addition to irrelevant messages.

How much do you agree with the following statement: "Most of the emails from brands/shops/sites I receive include no information or offers that are of interest to me."



Worse, 68% 'agree' or 'strongly agree' that emails 'include no information or offers that are of interest', up from 63% last year, showing that consumers believe marketing messages to be increasingly irrelevant.

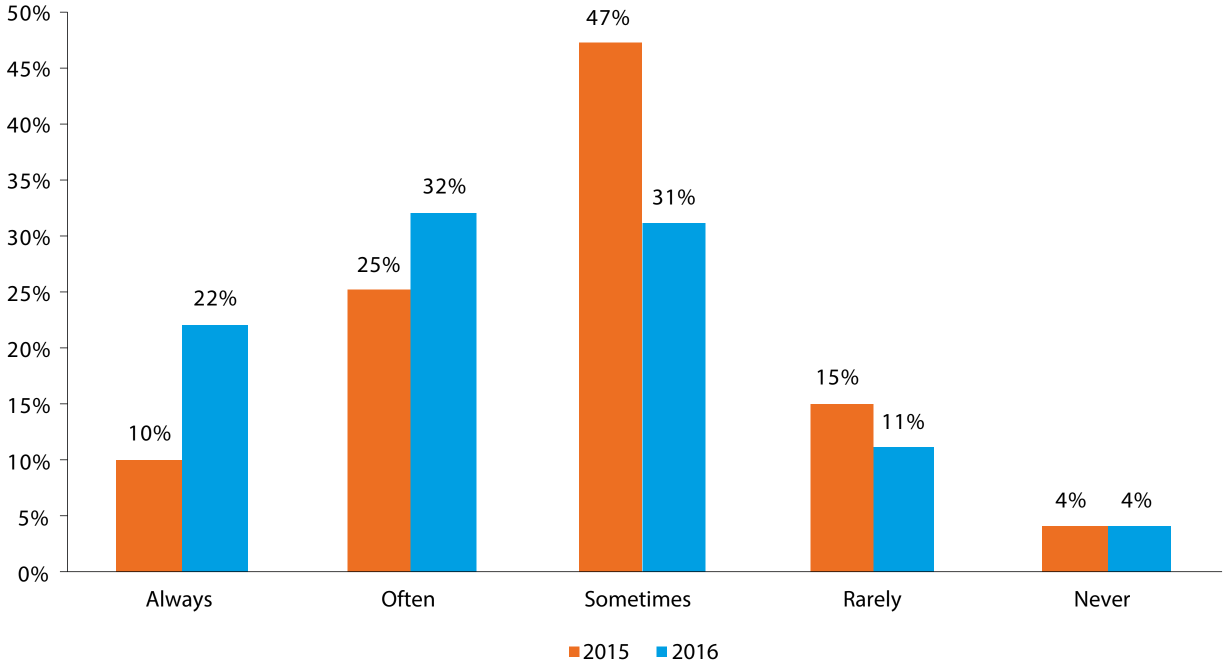
On average, how long do you keep a brand/shop/site's emails before deleting them?



5. DMA Data Privacy: what the consumer really thinks 2015: https://dma.org.uk/research/data-privacy-2015-what-the-consumer-really-thinks

This failure to resonate with consumers is the reason why emails remain ephemeral. Three in five emails (61%) are deleted after the consumer has read the subject or the whole email. Three quarters of emails (74%) are deleted after a day in any active inbox.

How much do you agree with the following statement: "I wonder how brands/shops/sites got me email address"



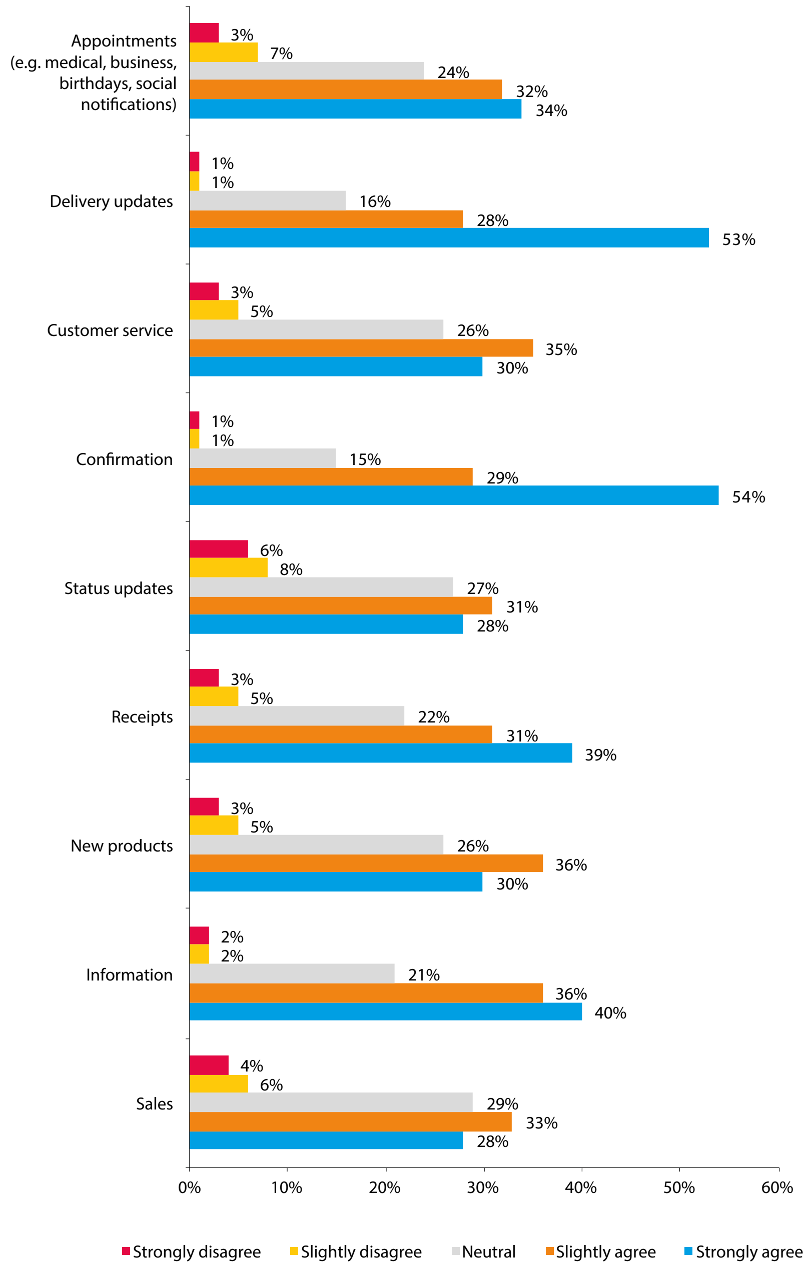
Consumers are more likely to wonder how brands got their email addresses compared to last year, with those 'sometimes' or 'always' wondering this increasing from 35% to 54%. As shown in the *Consumer Email Tracker 2015*, trust is critical. Reminding consumers when they shared their details with brands can help build trust and ensure your campaign emails are opened and read.

As the new GDPR legislation comes into force in 2018, the onus will be on brands to make sure consent is clear and unambiguous, which should reduce this loose affinity with brands.

6. The good news: consumers still like email

Despite falling consumer satisfaction with email messages, consumers continue to rate email highly, with only 2% disagreeing that email is the best medium for confirmations, up to just 14% disagreeing that email is the best medium for status updates.

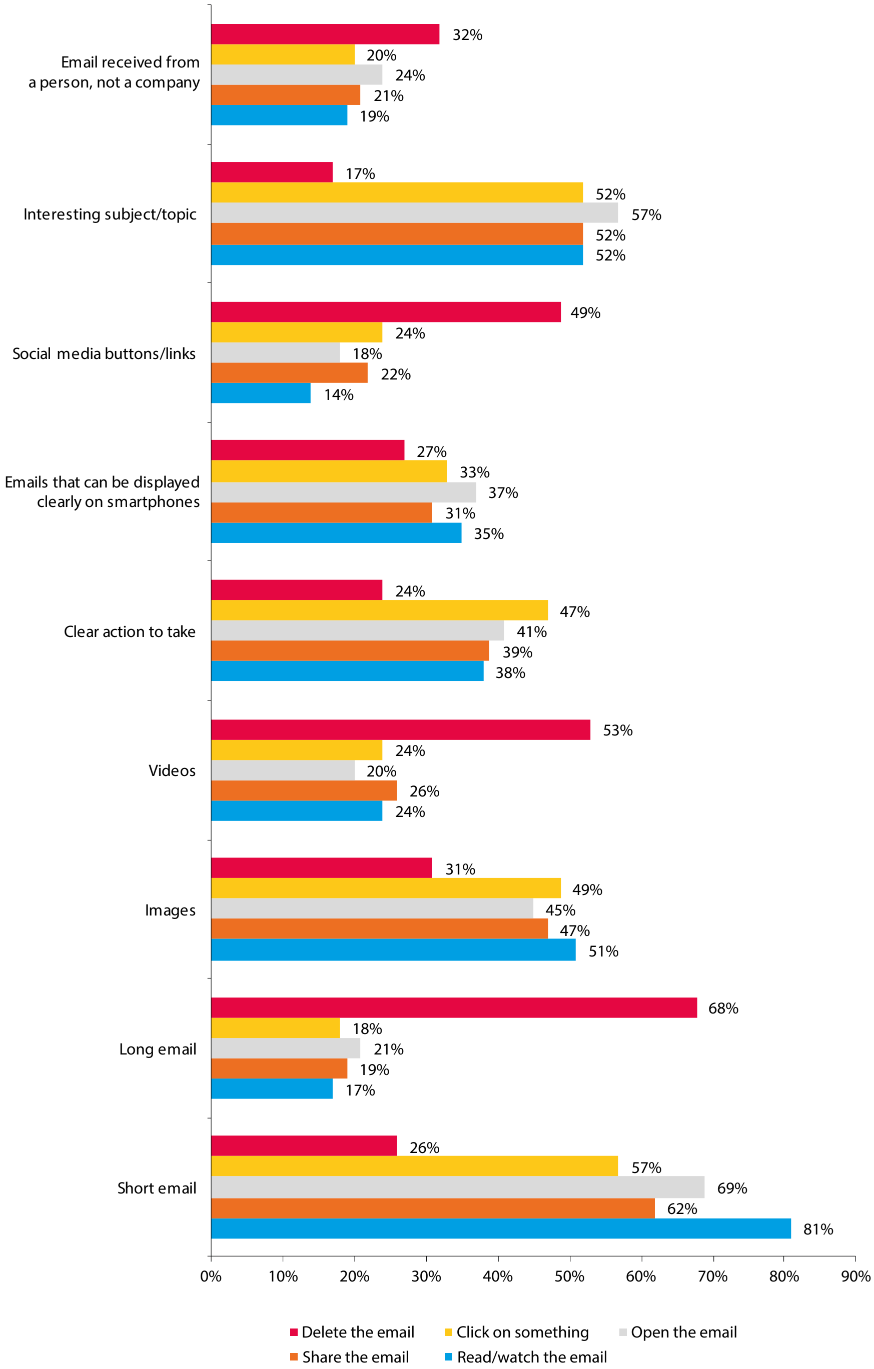
Which of these types of subjects would you agree are best served by email?



This shows the versitility of email: regardless of the topic, a substantial majority prefer email as the contact method. The worry for marketers should be that marketers are abusing this goodwill.

Furthermore, we know what consumers say makes for an attractive email.

Which of the following email characteristics are more likely to encourage you to take one of the following actions: Please select the top 3 for each action:

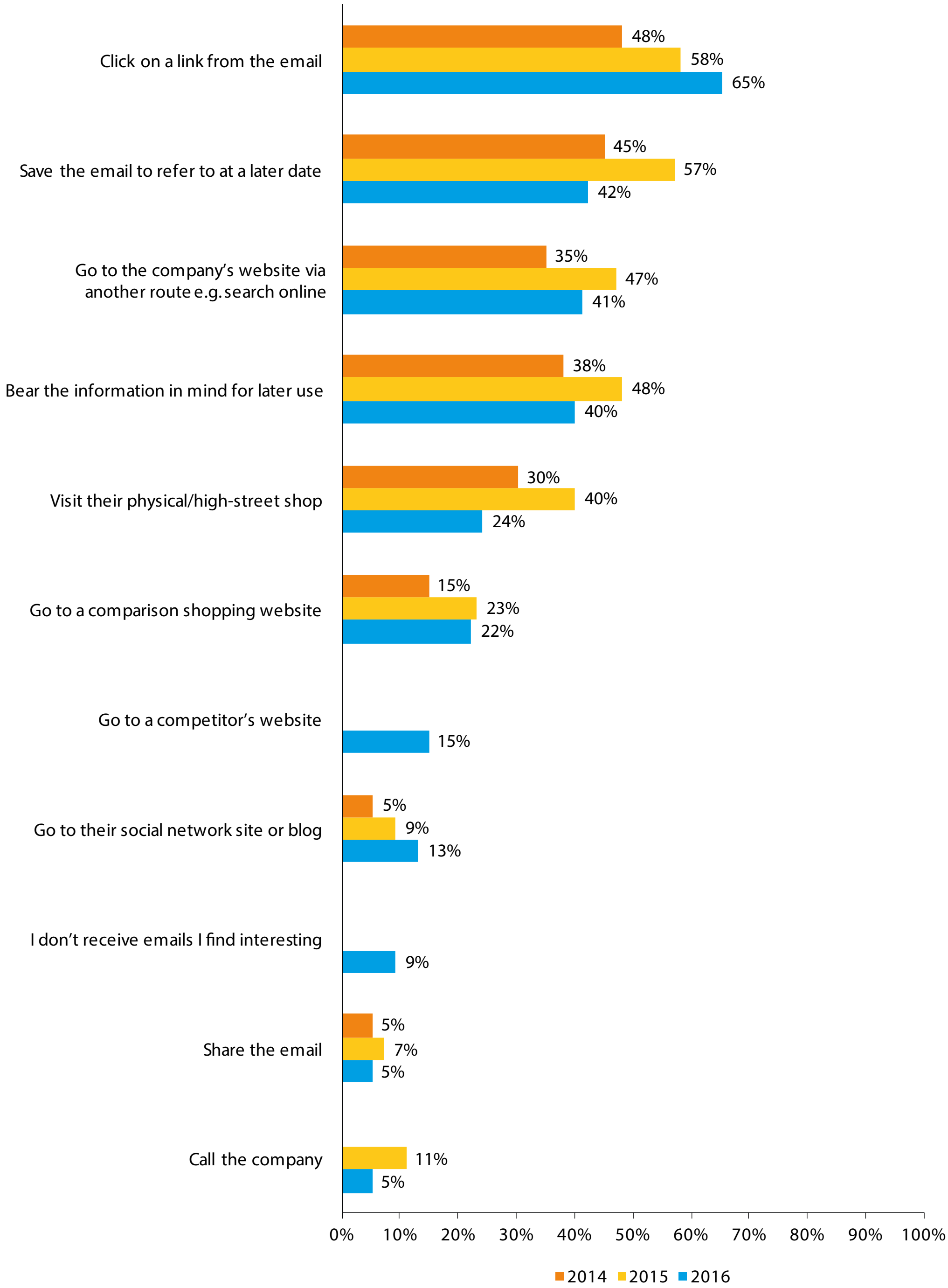


Consumers show a clear preference for short emails. They say they are more likely to take all actions mentioned except delete in the email if it's short.

Conversely, longer emails increased the chance of deletion. As mentioned above, consumers have low attention spans when it comes to email, most likely due to the volume of email

After length of email, consumers want an interesting subject or topic and images. Emails with a clear action and easily displayed on a smartphone were also popular. These preferences could be used as a guide to successful email.

After receiving an interesting email, what are the three most likely actions you would take?



In addition, should an email be sufficiently interesting, consumers are more likely than ever to click through, with two thirds (65%) choosing this option, which is significantly up on 2014, when this number was less than half (48%) of the total. Consumers are willing to engage with brands via email but it is essential that those emails are in the right format and contain information they want.

Fewer consumers would take options other than click-through compared to last year, although significant numbers would still go to a shop (24%), to a comparison website (22%), a competitor website (15%). This shows the difficulty of correctly attributing email campaign effectiveness.

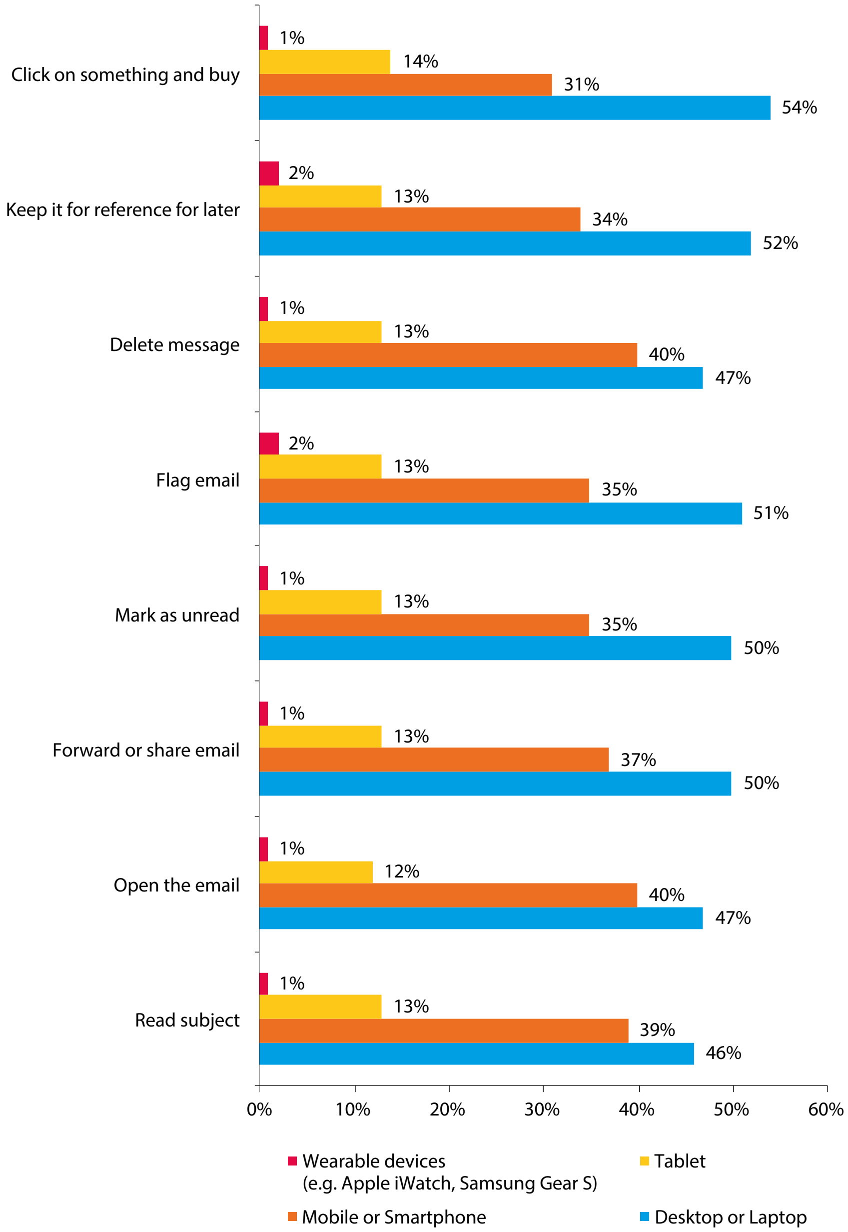
Consumers usually take these different options to check pricing, and shows that consumers really do like a deal. This matches *Talking the consumers' language: retail*[6] research which found that more than three quarters (76%) of consumers are willing to spend time shopping around in order to get the best value.

6. Talking the consumers' language: retail - https://dma.org.uk/research/the-new-rules-of-engagement

7. Smartphone

The smartphone continues to be incredibly important for email. The share of smartphone usage remains significant, although still at a level below desktop usage.

Please select the device you use most often to access emails from the brands/shops/sites you trust in the following ways:



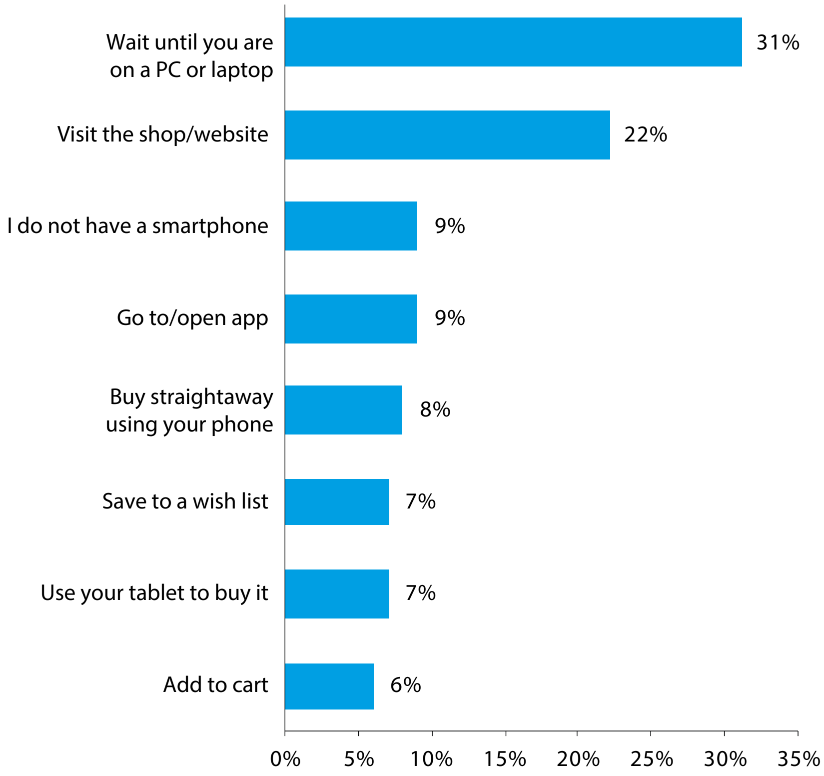
Despite the rise in smartphone use, desktop continues to have the edge over the smartphone for email usage, despite just 9% of respondents claiming to not have a smartphone. Together, desktop and smartphone use dominate email usage, with tablets coming in a distant third. Desktop use exceeds mobile use for every email measure, except for younger users where this is reversed (see below).

However, smartphone use has increased since last year for almost every measure of email usage. Those reading emails on a smartphone has risen from 33% to 39%, those opening on a smartphone has increased from 25% to 40%, forward an email on a smartphone from 21% to 37%, mark as unread from 25% to 35%, flag email from 27% to 35%, delete message from 27% to 40%, and to keep for future reference from 23% to 34%.

Almost one third (31%) say they use smartphones as the main device to click through and buy. As more websites cater to mobile users with responsive and mobile ready websites, this proportion will continue to increase.

In 2015 we advised brands to be mobile ready in their email messaging. Ten years on from the launch of the iPhone, this is even more important in 2017, with half of email usage carried out on a mobile device.

If you see something you want to buy in an email on your smartphone, you are most likely to…



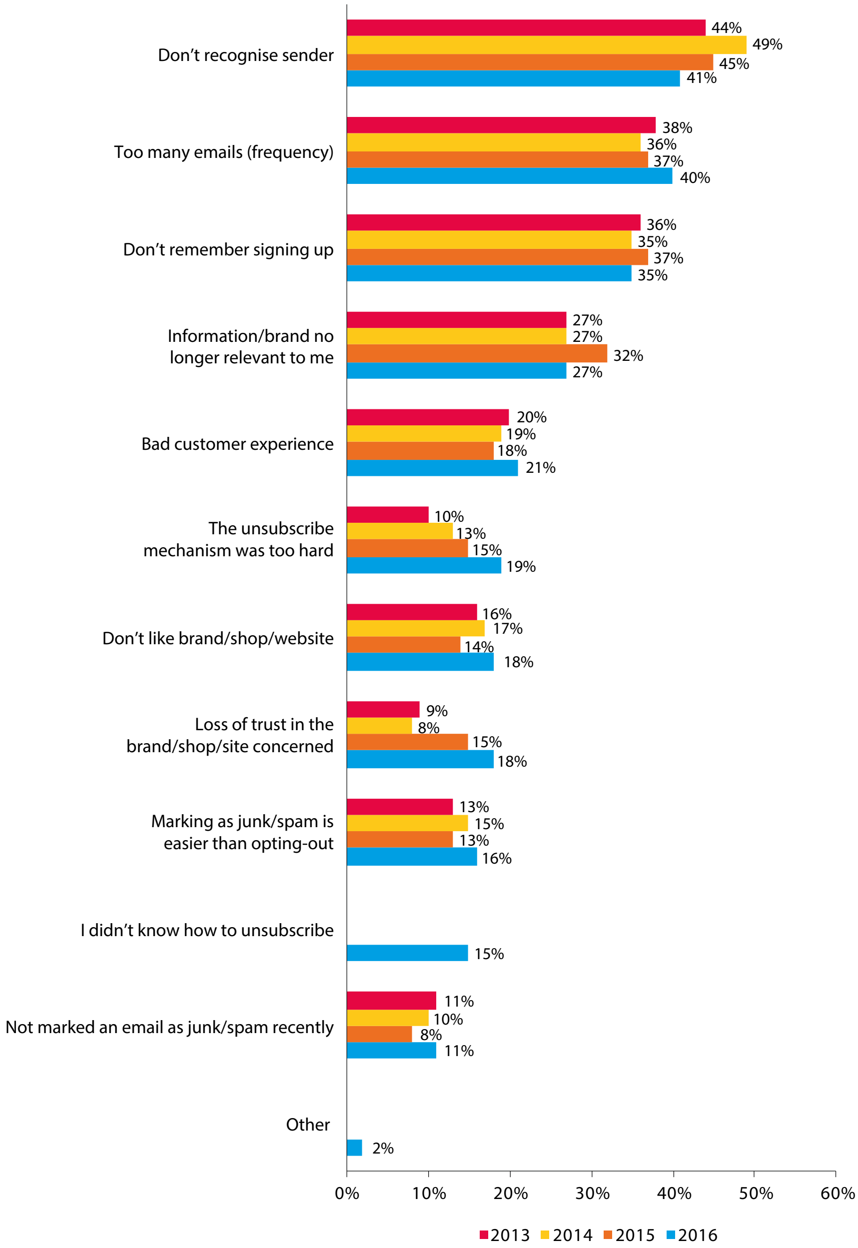
Despite the clear shift towards greater smartphones usage, smartphones remain tricky for completing various tasks that are simple on a desktop. This idea is reinforced by consumer behaviour. If a consumers sees something he or she want to buy on a smartphone, the top behaviour remains waiting until they are on a PC or laptop (31%), followed by going to the shop or website (22%).

Only 8% would buy immediately on the phone. Clearly mobile design continues to lag behind email design.

8. Spam/Unsubscribes

This year we feature a special focus on consumer attitudes to spam and use of unsubscribes. As obtaining consumers' main email addresses remains crucial, marketers need to understand why consumers go on to unsubscribe.

What is most likely to prompt you to mark an email from a brand/shop/site you trust as junk/spam? Please select up to 3 reasons:



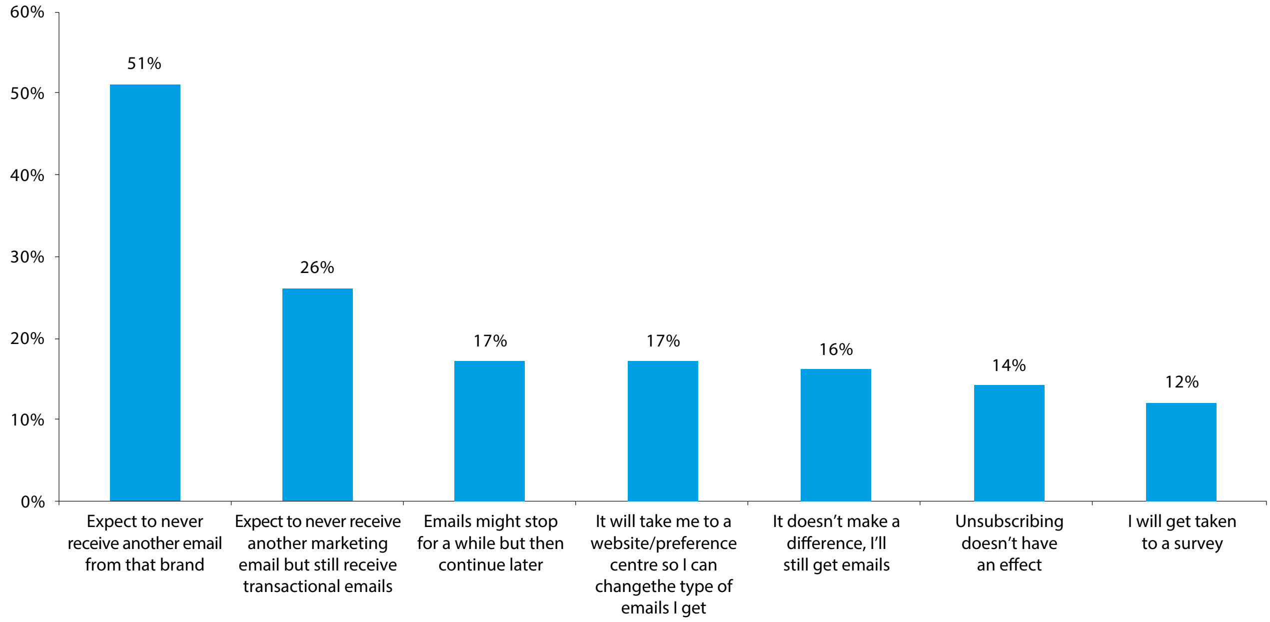
The top reasons to label a sender as spam is when consumers don't recognise the sender (41%, down from 45% last year) and could result from brands buying email lists; too many emails (40%, up from 37% last year); and not remembering signing up (35%, down from 37% last year) – these are all factors a brand could manage easily by reminding consumer how and when they signed up or by moderating the volume of emails.

Remaining options focus on a dislocation between the consumer and brand, whether that's because the brand has become irrelevant (27%, up from 32% last year, but comparable to previous years), or whether the consumer has lost trust in the brand (18%, doubling from 9% in 2013).

Interestingly, there are two ways a consumer could mark a sender as spam rather than unsubscribe: 'the unsubscribe mechanism was too hard' (19%, rising from 10% in 2013), and 'I didn't know how to unsubscribe' (15% - a new question this year), together totalling 35% of the whole. Problems with unsubscribe mechanisms then emerges as the third most popular option overall and shows that brands need to make sure the unsubscribe mechanism is easy to find and use.

When we then look at reasons to unsubscribe rather than mark as spam, two reasons stand out - receieving too many emails (65%), exceeded by brand unfamiliarity ('don't remember signing up' at 35% plus 'don't recognise sender' at 41%), making 80% of the total. Relevance and like/dislike of the brand were also significant factors.

What do you expect to happen when you unsubscribe?



The unsubscribe option remains problematic for some consumers, with 30% saying either they still receive emails or unsubscribing doesn't have an effect. Just over half (51%) are confident they will not hear from a brand again.

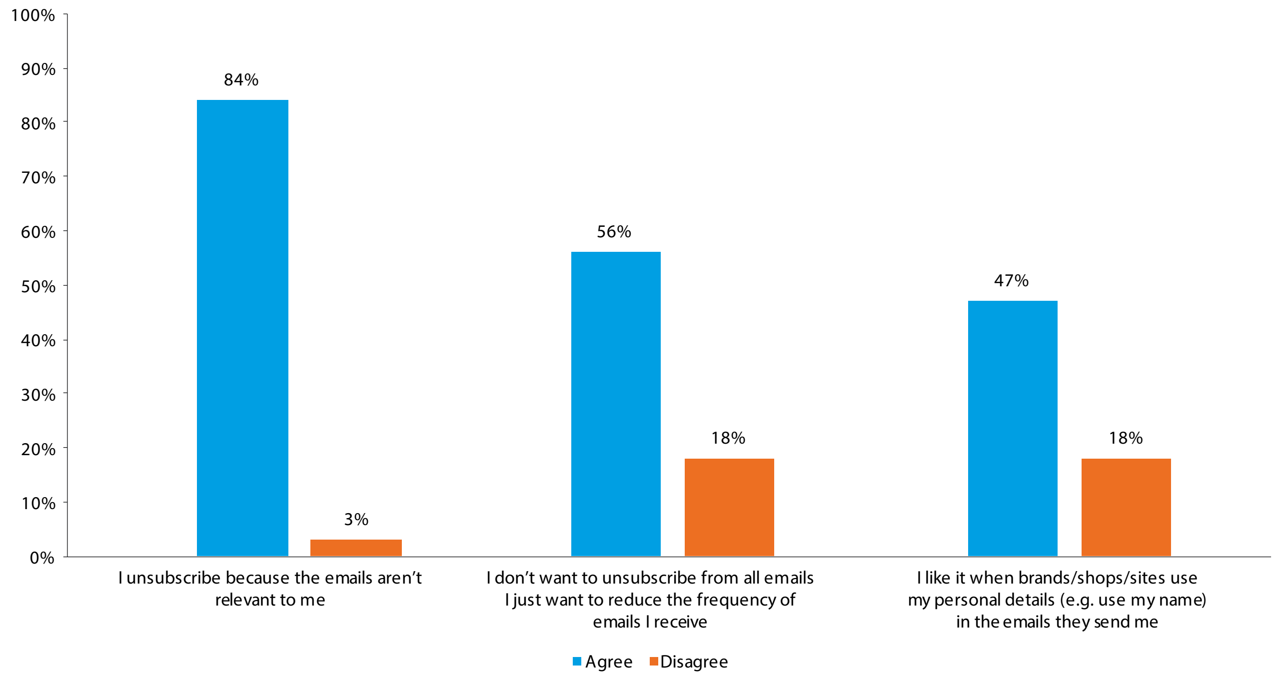
Unsubscribes may not prevent emails concerning transactions, but there is no guarantee that consumers will be aware of the distinctions between different types of email.

Only 17% say they are taken to a preference centre to manage their messaging, which remains best practice. An equal number say emails will stop before starting again. Clearly the unsubscribe option is not working correctly for many consumers, or at least this is what consumers perceive.

In May 2018 the EU *General Data Protection Regulation*[7] will come into force, which will cede more control of consumer data back to consumers. Brand will need to have features in-place to allow consumers to take this control should they want it. Preference centres are one of the main tools for brands to best manage what emails your recipients receive.

7. GDPR - https://dma.org.uk/gdpr

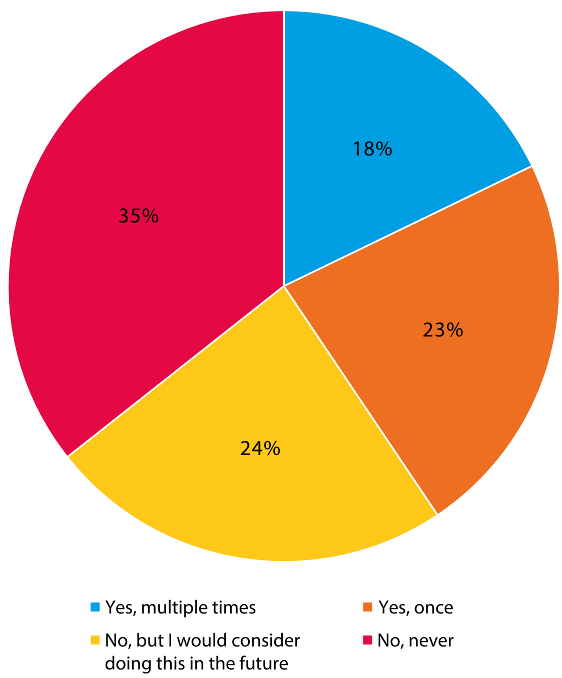
How much do you agree with the following statements:



Consumers are more likely to unsubscribe if emails are irrelevant (84% 'strongly' or 'slightly' agree), while a smaller proportion would like to reduce the frequency of emails (56% 'strongly' or 'slightly' agree).

Personalisation was not as important as relevancy for consumers. Only 47% 'slightly' or 'strongly' agreed that they like personal details in brand emails. This mirrors *Talking the consumers' language: retail*[8] research which shows that relevancy was more important to consumers than personalisation.

Have you ever stopped using your main personal email address due to the number of emails you received from brands/shops/sites?



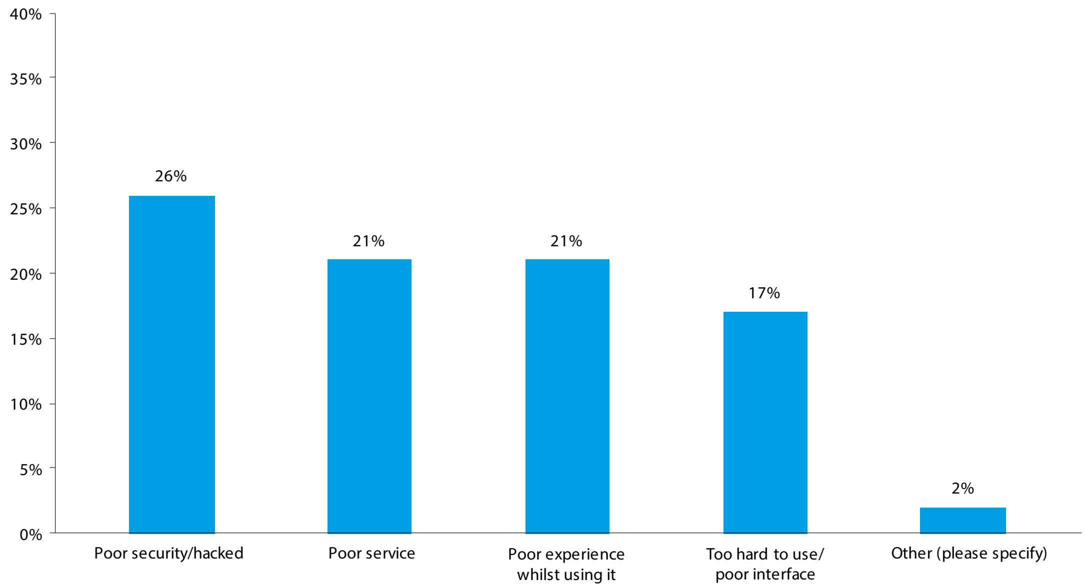
8. Talking the consumers' language: retail - https://dma.org.uk/uploads/misc/575ad63572ed4-talking-the-consumer's-language---retail_575ad63572e3b.pdf

Too much email may become more of a concern.

Two in five (40%) have already stopped using an email address because of too much email. Another 24% would consider doing this. In total this represents two thirds (64%) of the total, and can't be a good message for marketers using email. Marketers have a duty of care to those who subscribe: respect the inbox or lose access to it.

Choosing to stop using an email address is, as we estabilshed above, a rather drastic measure because people invest heavily in their email address and may have used it for a long time. Abandoning an email address demonstrates an extreme level of irritation and frustration.

Why have you stopped using a personal email address?



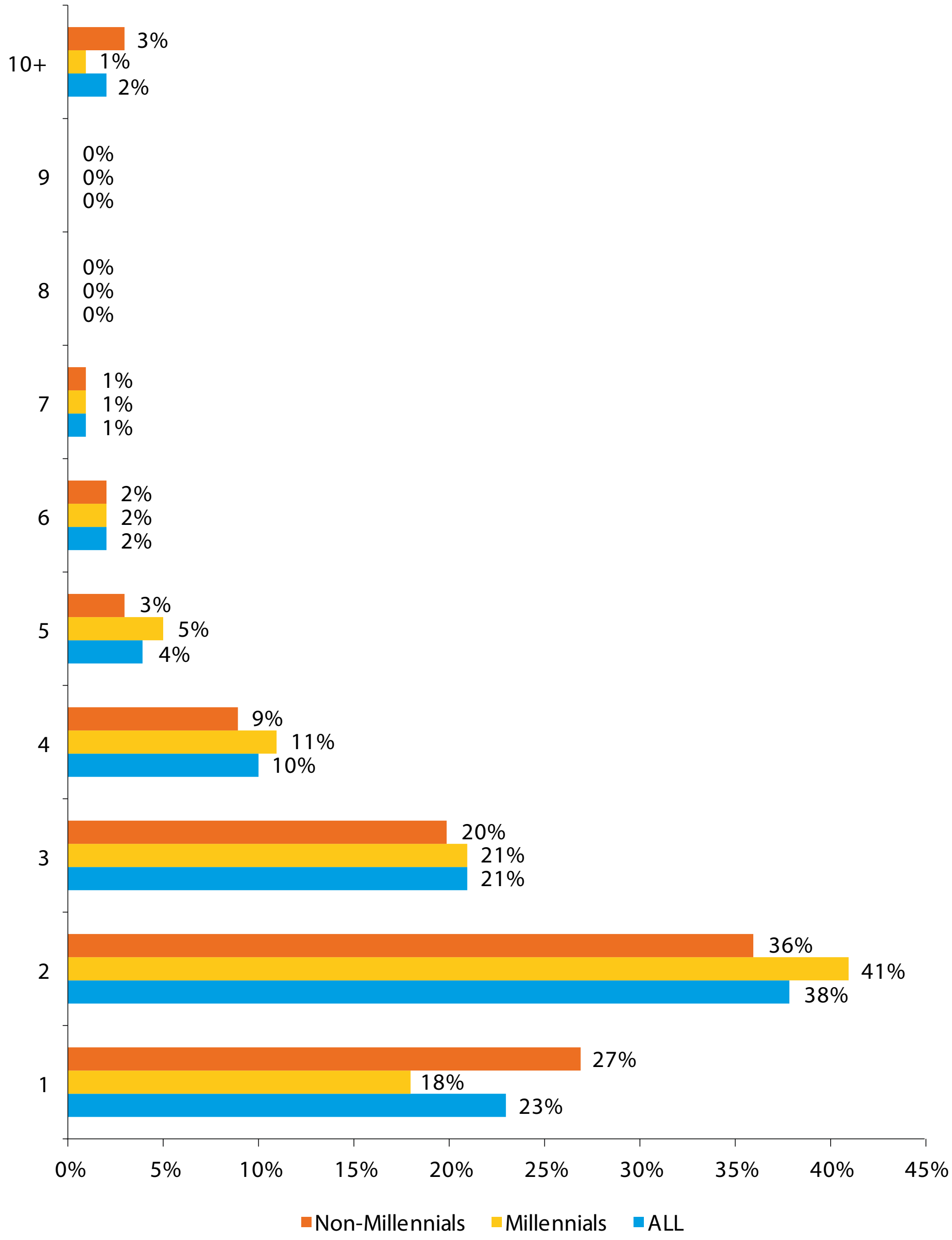
Perhaps predictably, the top reason for abandoning an email address is too many emails, for more than half (57%) of those who have abandoned an address in the past. Of course this could be due to too much spam or too many messages, but modern spam filters generally work well. Factors relating to the email service provider were, taken together, more significant with poor security (26%), poor service (21%), poor experience (21%) and poor interface (17%) also important.

9. Youthful email usage

Marketers talk enthusiastically about 'Millennials' but this term has become controversial. We monitored the email related behaviour of people aged 36 and younger, which includes the whole 'Millennial' or 'Generation Y' population, plus those aged down to 18.

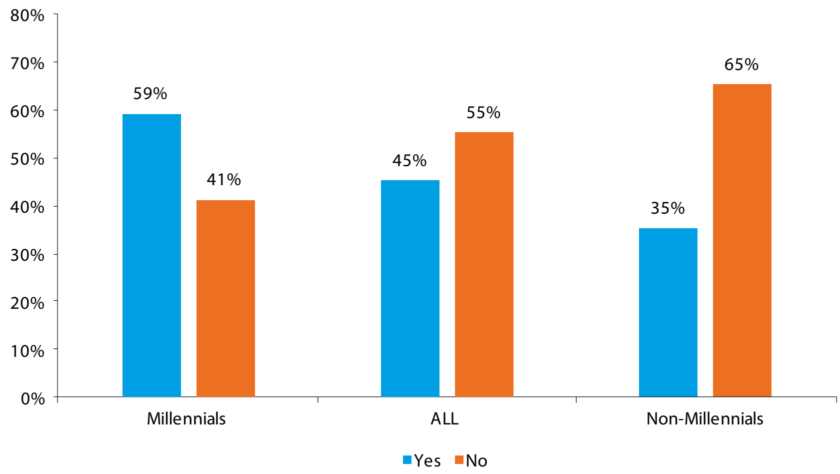
According to our research, younger people are more likely to have two email addresses – 41% have two email addresses compared to 36% of non-Millennials. This group is also also more likely to have a dormant account. Three fifths (59%) of younger people will have a ghost account compared to one third (35%) of older consumers.

How many email addresses do you have? Please think about work and personal



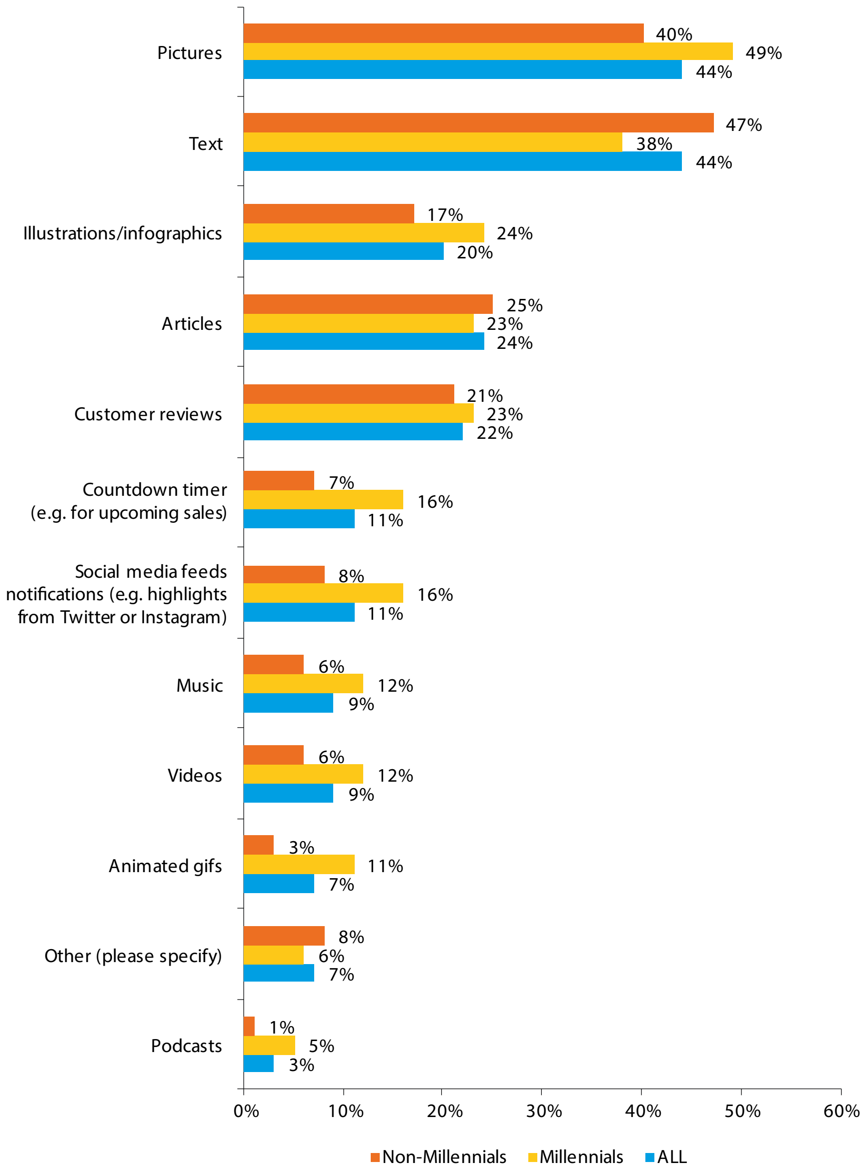
If consumers have strong attachments to their email addresses, younger consumers may not yet have formed that attachment and so choose more than one. This may also demonstrate the abandonment of email addresses due to email overload.

Do you have any personal email addresses that are inactive/you don't use anymore? E.g. old email addresses, or email addresses given to you when setting up broadband.



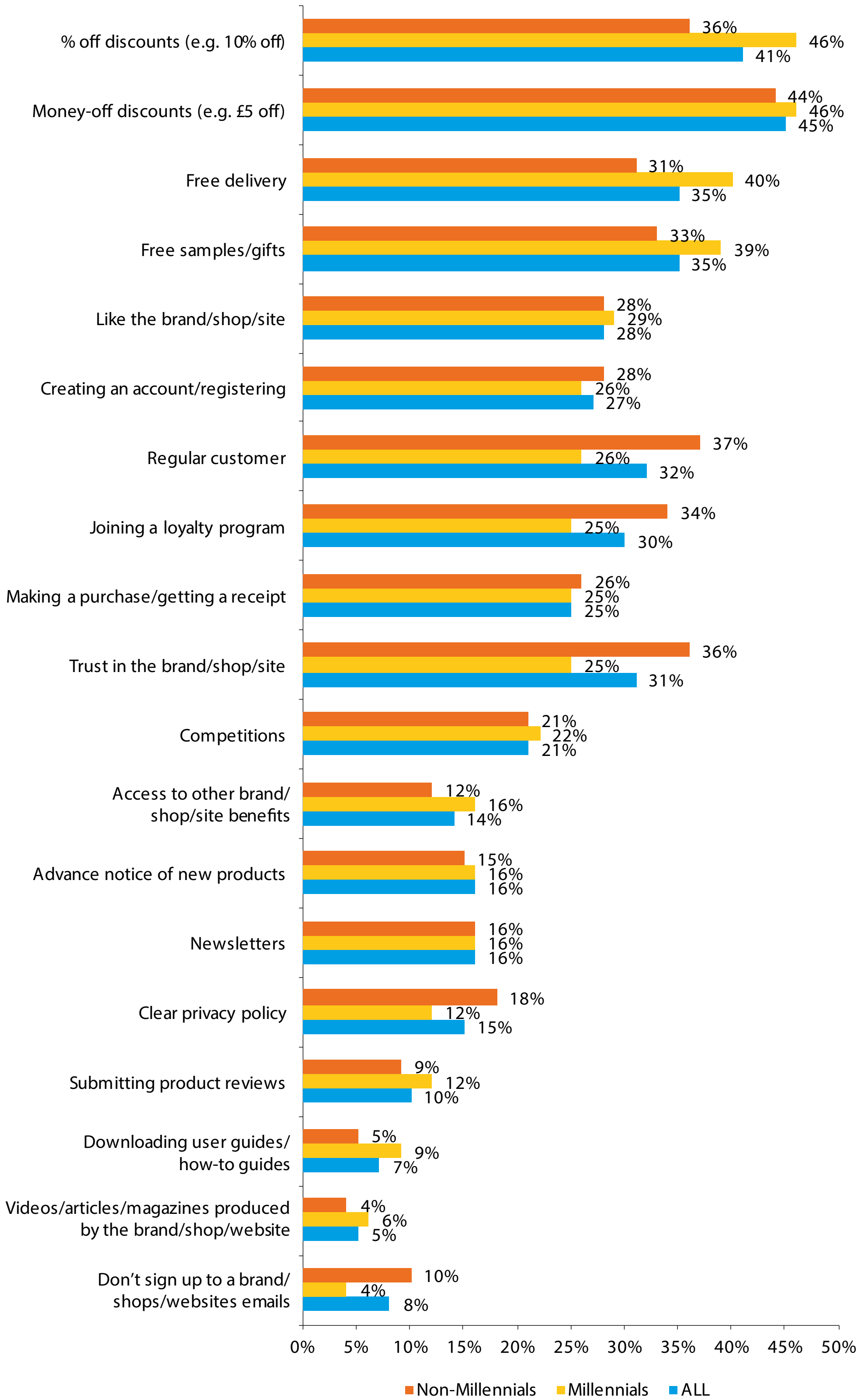
For email content there are some differences. Younger people prefer pictures in emails - 49% of younger people prefer pictures compared to 40% of older consumers. They are correspondingly less enthusiastic about text in emails. Just 38% of younger people prefer text compared to 47% of older consumers.

What do you like best in emails?



Younger people are savvy shoppers, conditioned to shop around for the best deals, and are more likely to find free delivery a good reason to share their details (40%, compared to 31% of the whole sample). However, younger people found many other reasons less persuasive: only a quarter (26%) of younger people found being a regular customer a good reason to share data compared to 37% of older consumers; a similar proportion (25%) of younger people were persuaded by loyalty programmes compared to 34% of older consumers; and 25% were convinced by trust in the brand compared to 36% of older consumers.

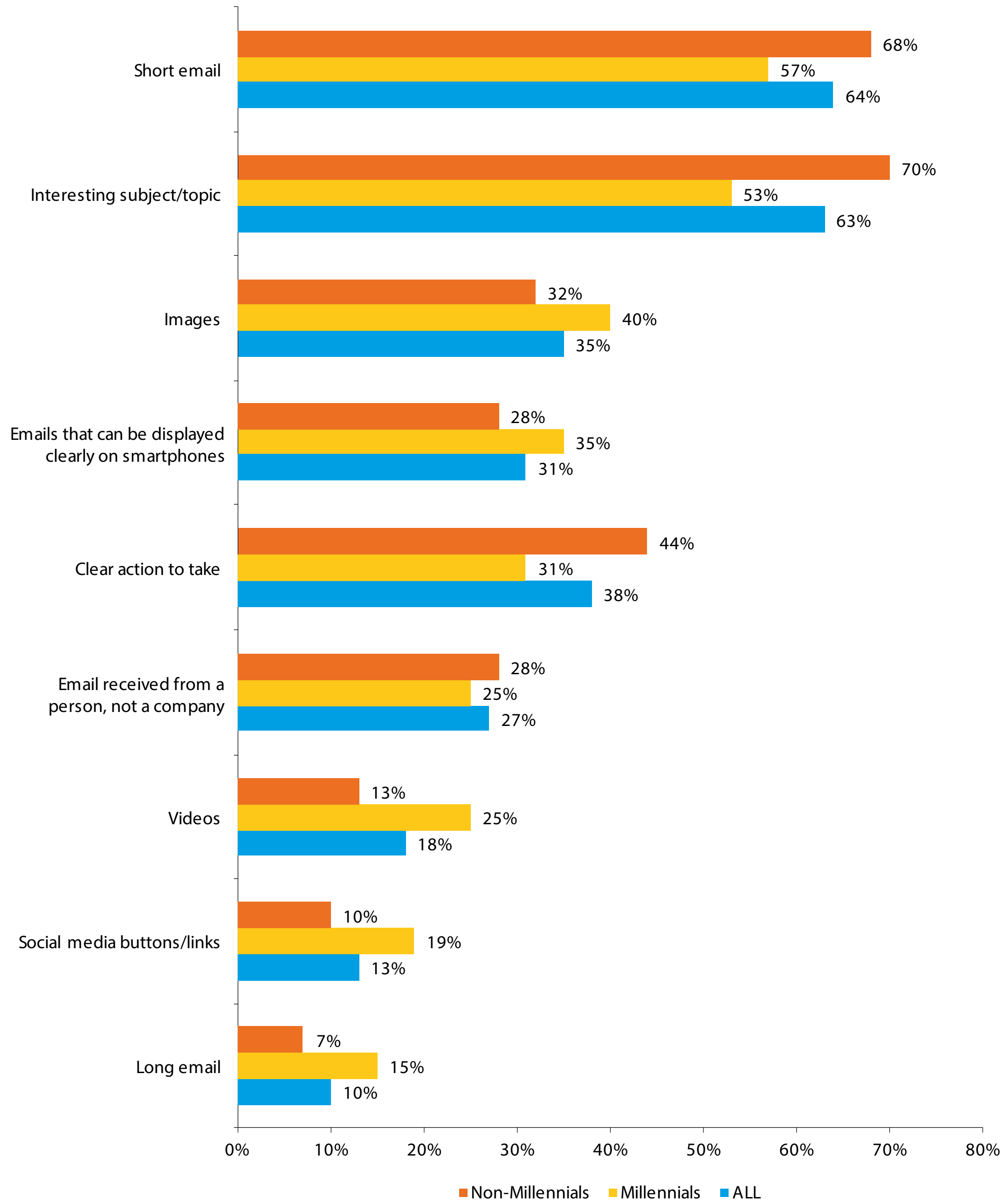
What persuades you to give your email address to a brand/shop/website?



This last point ties to *DMA Consumer Attitudes to Privacy* research (2015) which suggests Millennials are more likely to be unconcerned about how their data are used by brands, but according to this research, trust in the brand is less of a factor, trumped by factors to do with convenience, like free shipping.

Despite assurances that 'Millennials' have a shorter attention span, our research suggests that younger people are twice as likely to read long emails; 15% would read a long email compared to 7% of older consumers. They are converselay slightly less enamoured with short emails, 57% preferring them compared to 68% of older consumers.

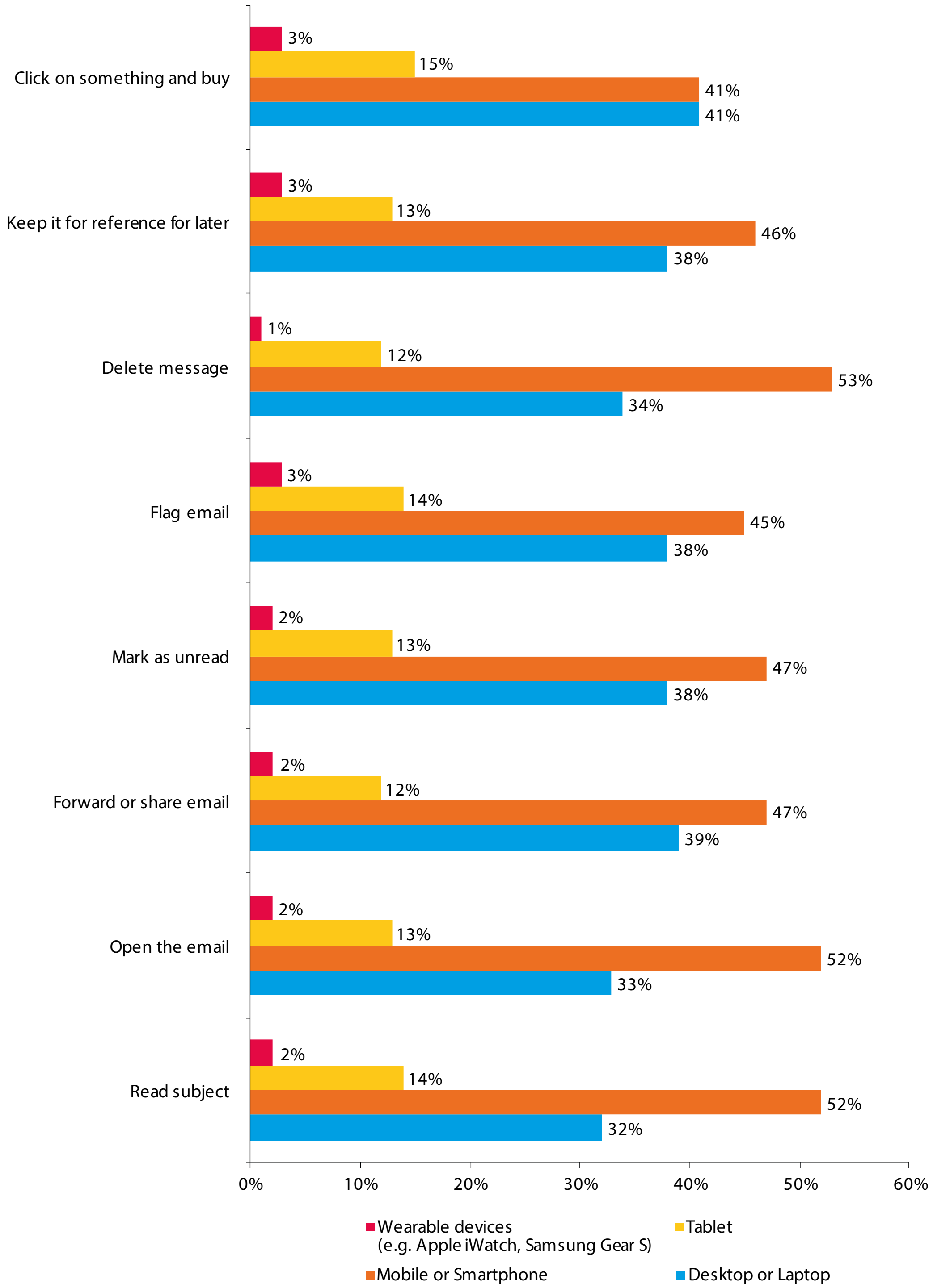
Which of the following email characteristics are more likely to encourage you to take one of the following actions? Please tick the top three which are most likely to encourage you to read/watch the email:



Mainly smartphone

Younger people are more likely to manage their email accounts on a smartphone. In fact for younger people the smartphone is the default device for most tasks, including email, overtaking desktop for every activity except clicking to buy, which remains at the baseline level. Older consumers tend to focus on desktops more than the general population.

Please select the device you use most often to access emails from the brands/shops/sites you trust in the following ways:



Tolerance/realistic view

Young people are more likely to be tolerant of senders they don't recognise, with 34% saying this was a factor in marking a sender as spam, compared to 46% of older consumers.

They are also less likely to unsubscribe from brand emails, with fewer younger people saying they would unsubscribe if they didn't recognise the sender (33% vs 42%), if information was no longer relevant (29% vs 42%) or if the brand was no longer relevant (19% vs 30%).

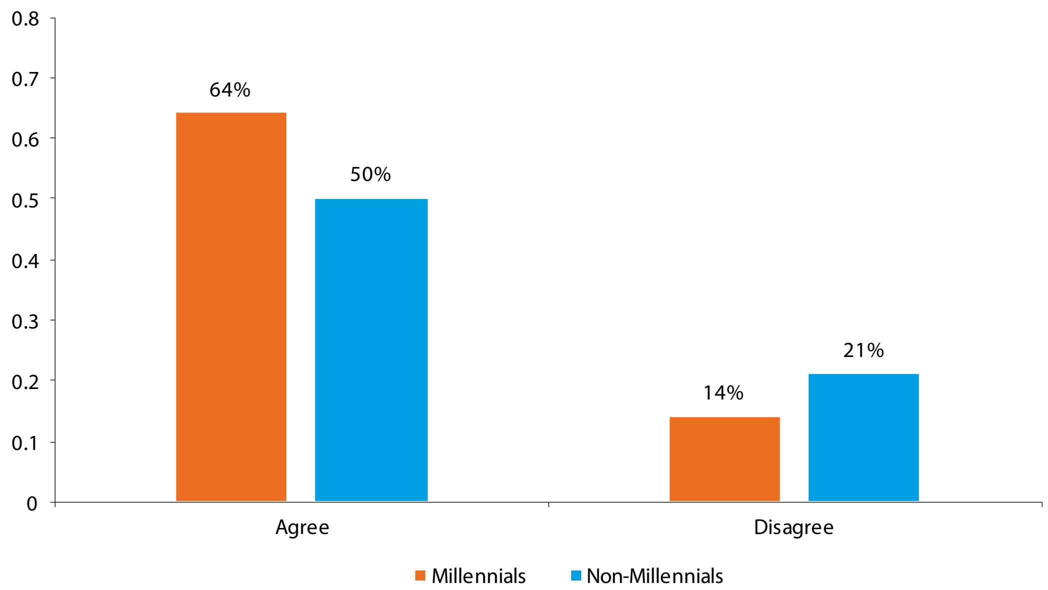
Younger people also have lower expectations about what happens if they unsubscribe. More than two in five (42%) expect to never hear from a brand again if they unsubscribe, compared to 57% of older consumers.

Younger people would prefer to reduce the level of emails rather than unsubscribe, 64% agreeing with the statement, "I don't want to unsubscribe from all emails I just want to reduce the frequency of emails I receive" compared to 50% of older consumers. This shows how important preference centres can be, particularly for younger consumers.

The whole sample identified problems with unsubscribing. Increasing the prominence of a preference centre may help keep younger consumers engaged.

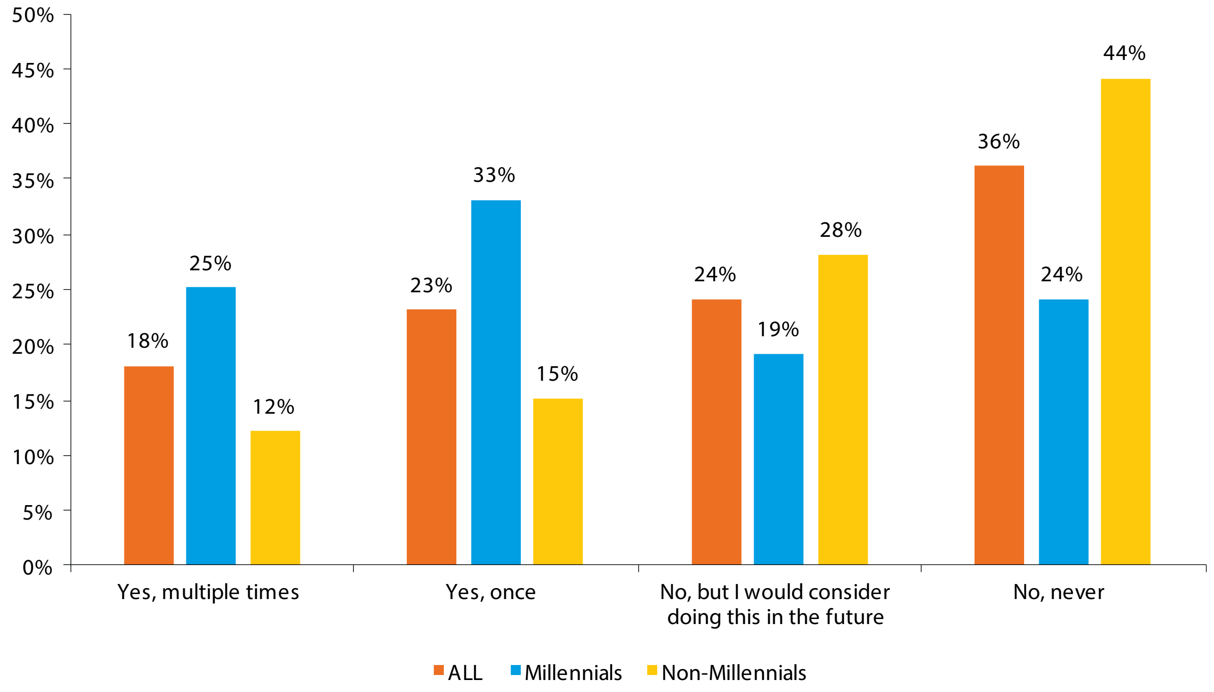
Younger people are better disposed to personalisation too, with 58% agreeing with the statement, "I like it when brands/shops/sites use my personal details (e.g. use my name) in the emails they send me" compared to 39% of older consumers.

I don't want to unsubscribe from all emails I just want to reduce the frequency of emails I receive



But their tolerance only goes so far. Younger people are more likely to abandon an email address compared to older consumers. 58% have abandoned an email address due to email overload compared to 27% of non-millennials.

Have you ever stopped using your main personal email address due to the number of emails you received from brands/shops/sites?



Marketers need to know their audience well, and adapt campaigns for younger and older audiences, adapting messaging accordingly.

Methodology

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

Beautiful Insights conducted the consumer survey with 1239 responses received from their YouSay customer panel. This is a closed panel which members of the public cannot voluntarily join and comprises approximately 90,000 profiled UK residents, recruited through numerous sources to demographically represent the markets based on gender and age. The online survey was then distributed to a random selection from Beautiful Insights' panel to gain a sample representative of the UK population, with a £250 prize draw as incentive. Participants were naïve to the purpose of the questionnaire prior to consenting to participate.

There were 40 questions in total, results reweighted by age and gender. The panel was constantly re-qualified to ensure current background variables.

The survey opened on 23/08/2016 and closed on 31/08/2016.

DMA staff compiled the findings presented in the present report.

The findings were launched at an event on 10th November 2016.

About dotmailer

Our mission

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

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

Our heritage

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

Our future

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

dotmailer
EMAIL MARKETING

About the DMA

A DMA membership will grow your business. Our network of more than 1,000 UK companies is privy to research, free legal advice, political lobbying and industry guidance. Our members connect at regular events that inspire creativity, innovation, responsible marketing and more. Most of them are free. A DMA membership is a badge of accreditation. We give the industry best-practice guidelines, legal updates and a code that puts the customer at the heart.

We represent a data-driven industry that's leading the business sector in creativity and innovation. One-to-one-to-millions marketing attracts the brightest minds; individuals that will shape the future. By sharing our knowledge, together, we'll make it vibrant.

www.dma.org.uk

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