Thomas Ridley-Siebert

is research manager at the DMA (UK). He is responsible for developing and managing the various strands of research the DMA produces. The DMA has a network of more than 1,000 UK company members who are privy to research, free legal advice, political lobbying and industry guidance. Its members connect at regular events that inspire creativity, innovation, responsible marketing and more.

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Consumer channel preferences

Consumers checking-in

Thomas Ridley-Siebert
DMA (UK),
DMA House, 70 Margaret Street,
London W1W 8SS, UK
Tel: +44 (0)20 7291 3300
Fax: +44 (0)20 7291 3301
E-mail: thomas.ridley-siebert@dma.org.uk

Business Intelligence

DMA Insight: Consumer email tracking report 2015

Thomas Ridley-Siebert

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Abstract

The DMA with its insight partner Beautiful Insights and sponsor dotmailer has published the latest results of its email tracking research series. The results are from the seventh wave of the email tracking survey that explores consumer attitudes and trends for email marketing in the United Kingdom. This article covers findings from the new questions that were added in the most recent offering of the survey and highlights some important trends across the averages reported year-on-year.

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Introduction

Consumer expectations and habits are anything but static. Of course consumers are mobile, but their mobile–email relationship is complicated. They are increasingly happy to manage and sort emails on their smartphones, but they are still reluctant to buy on a smartphone, leaving that for the desktop or laptop. Putting the customer first means building your business around such consumer preferences.

Key findings

Email according to Ipsos is a near universal habit with 85 per cent of digitally connected consumers using the channel. This penetration of the channel into everyday life has led 6 per cent of consumers to check their email every 5 minutes, while 12 per cent check every 15 minutes and 28 per cent every hour. Although this frequency of checking email is high, the degree of engagement is still relatively low — 44 per cent of consumers use email for only less than 1 hour per day at home. Notably, however, this is up from 33 per cent in 2014.

Increasingly, this checking-in behaviour happens on the go with 39 per cent of consumers who use email for less than 1 hour each day, doing so from their mobile device. Research by Tecmark in 2014 suggested that British smartphone users check their phone up to 220 times per day. Ofcom notes that email is the most popular activity

Figure 1: Shelf life of email addresses 2015 v 2014

Figure 2: Multiple email addresses and their uses

Multiple email addresses

among 81 per cent of smartphone users. This makes the ‘mobile email twitch’ an important aspect of consumer media consumption.

If checking email is a rapid, short action, then keeping email addresses is the opposite — a long-term aspect of the consumer’s identity, which remains stable over a long period. When asked in 2014 how long they kept an email address, 81 per cent said more than 5 years — the longest period offered as an option. In 2015, this was broken down into more bands, but 51 per cent still said they kept an email address for 10 years or more (Figure 1).

The proportion of consumers who have multiple email addresses continues to rise, with 39 per cent now having two, up from 31 per cent in 2014. A significant minority of 5 per cent claim to have 10 or more email addresses. This perhaps reflects media fragmentation with specific email addresses being used for specific channels. Certainly, 18 per cent say that they have one email address that they use for social accounts and a separate one that is used for any marketing emails (see Figure 2).

Figure 3: Actions taken with email

Consumers understand that signing up their email address means more emails and so, multiple accounts can help manage this. These tactics help consumers exert their power and control over messaging. Giving control to consumers to select their messaging preferences, segmenting and personalizing these emails could do much to reduce irrelevant messages.

Actions taken with emails

After some years during which the impact of email on consumers had been declining, the good news is that all forms of action have shown a positive increase in 2015. Key measures that matter to marketers are now much more strongly evident — 58 per cent of consumers say they click through from an email, up by 10 per cent over 2014, and 47 per cent say they go to the sender's website via another route (such as searching online), up by 12 per cent over 2014 (see Figure 3).

There is also the potential for delayed response, as 57 per cent save the email to refer to later (up by 12 per cent over 2014), with 48 per cent bearing the information in mind for later use (up by 10 per cent). Going to a social network or blog has nearly doubled to 9 per cent from 5 per cent in 2014, whereas consumers are now also more willing to ring the company, with 7 per cent mentioning this action — the highest level seen in the last 5 years.

Tracking and measuring some of these actions will be challenging for marketers as they may be indirect — using search is a good example, while 23 per cent say they find the company via a comparison website (up by 8 per cent). Forty per cent of consumers will visit the company's shop or retail outlet (up by 10 per cent), which makes the use of cross-channel tracking techniques, such as coupons or loyalty cards, all the more important.

Purchasing from email

Consumers continue to show a reluctance to buy directly from an email via their mobile phone, although the proportion has risen to 7 per cent in 2015, while 10 per cent will use their tablet to make a purchase (see Figure 4). This proportion is likely to jump dramatically as mobile

Figure 4: Purchasing from email

payment systems become easier to use and more widely adopted, offering marketers a real first-mover advantage. Ten per cent are already adding an item to their shopping basket or wish list, which can be accessed at a later time (and perhaps via a different device).

An increasing proportion of consumers opt to go directly to the company's store, up to 16 per cent in 2015 compared with 13 per cent in 2014 and 10 per cent in 2013. For a sizeable proportion of consumers — 40 per cent — there is an ongoing reluctance to purchase from a mobile device and a preference to wait to complete a transaction via a PC or laptop. This behaviour has remained stable. That said, it is notable that there has been a steep drop in the number of consumers who do not have a smartphone, falling to 17 per cent from 27 per cent.

Deletion of email

In the attention economy, the key goal for marketers is to get their message seen. For 21 per cent of consumers, the subject line is sufficient, and they delete emails after reading it (see Figure 5). However, 41 per cent first read the email and then delete it — a crucial opportunity for a company to drive immediate action. From that point onwards there is a steep decay curve in the shelf life of an email: 14 per cent of consumers will delete a message within 1 day, whereas 10 per cent leave it for 2–3 days,

Figure 5: Deletion of emails

and 6 per cent delete after 1 week. Some messages linger on — 4 per cent of consumers keep emails for up to a month before deleting them, whereas 1 per cent leave it even longer, and 4 per cent never delete. (Previous research offered a more limited range of options — in 2011, there was a much greater likelihood of an email being kept for up to a month or more than is the case in 2015.)

There may be an argument that even the act of deleting an email will have an effect on the consumer, but it is more likely that once an email is out of sight, it is also out of mind. Rapid deletion could also demonstrate that the consumer is not interested. That three-quarters of emails are deleted so rapidly is a savage commentary on the overall relevance of emails sent and that emails need to be sent with the right message and at the right time for better impact.

Brand trimming

Consumers have trimmed the number of brands they follow to a manageable number. On average, people have signed up to receive email from 9.8 brands, with almost two-third of people (61.6 per cent) clustering around 6–20 brands, up from 46.9 per cent in 2014 and 43.9 per cent in 2013 (see Figure 6). The largest rise was among those who receive messages from 6 to 10 brands, up from 25 per cent last year to 32 per cent this year.

Few people sign up to receive email from only a small number of brands — just 8 per cent said they signed up to just one or two. This shows that brand messages are normal and accepted by the majority. Likewise, fewer people sign up to a very large number of brands — 6.9 per cent signed up to more than 31 brands, down from 11 per cent in 2014 and 2013, respectively, and from 12 per cent in 2012. If consumers have lost patience with brands that offer them nothing, they will get rid of them and are actively trimming the number of brands with access to their email inbox.

Figure 6: Number of brands followed

Tracking the customer journey

Implications for marketers

Marketers should consider two consequences from the research findings. First, if an email prompts an action, then multi-channel messaging has to be right or the activity is wasted. If consumers choose another route to your website, you need to make it easy for them. Email has to work as part of a multi-channel experience, including search and SEO, so that the email achieves the desired effect even if the consumer does not simply click through. This equally applies off-line. If the consumer decides to go to the shop, the same brand messages should be clearly signposted in-store or in point-of-sale material.

Secondly, if the consumer decides to not take the click, then attribution will be problematic. Knowing the consumer journey is extremely important, using consumer data to map this journey and the place email takes in it will win significant benefits. In addition, if significant numbers of people choose to bypass the email click, what should the proportion of clicks that currently go to search be correctly attributed to email? Knowing these answers may actually increase email return on investment or indicate that budget should be diverted from search to email.

Representative UK sample

Methodology

Questions for this survey were scripted in collaboration with DMA staff, dotmailer and research supplier Beautiful Insights, which conducted the consumer survey with 1,118 responses from its YouSay customer panel. This is a closed panel that members of the public cannot voluntarily join and comprises approximately 90,000 profiled UK residents, recruited through numerous sources to represent markets demographically 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. There were 23 questions in total, and results were re-weighted by age and gender. The survey opened on 10 October 2015 and closed on 23 October 2015.

The full Consumer email tracking report 2015 is available to DMA members and can be downloaded from www.dma.org.uk/research.