Email Marketing StatPack 2018
Benchmarks and Trends

October 2018

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This StatPack features the latest data and trends for the email marketing landscape, as well as interviews from industry experts and brands.

Consumer Email Usage

Marketers and Email

Measuring Success in Email Marketing: Benchmarks and KPIs

Email Deliverability, List Maintenance and Permission in the Wake of GDPR

Are Your Emails Mobile-Ready?

Crafting Relevant Messages with Data-Driven Strategies

Managing Email and Aligning It with the Holistic Customer Experience

Email Technology on the Horizon
Consumer Email Usage
Roughly 80% of the US population will use email by 2022

Source: eMarketer, August 2018
In 2018, **281.1 billion emails** will be sent and received daily

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**Total Emails Sent and Received Daily Worldwide, 2017-2022**

*billions and % change*

<table>
<thead>
<tr>
<th>Year</th>
<th>Emails sent and received daily</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>269.0</td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td>281.1</td>
<td>4.5%</td>
</tr>
<tr>
<td>2019</td>
<td>293.6</td>
<td>4.4%</td>
</tr>
<tr>
<td>2020</td>
<td>306.4</td>
<td>4.4%</td>
</tr>
<tr>
<td>2021</td>
<td>319.6</td>
<td>4.3%</td>
</tr>
<tr>
<td>2022</td>
<td>333.2</td>
<td>4.3%</td>
</tr>
</tbody>
</table>

*Note: includes business and consumer emails*

*Source: Radicati Group, "Email Statistics Report, 2018-2022," March 5, 2018*
The majority of US internet users check email on their smartphone most often

US Internet Users Who Use a Smartphone Most Often for Checking Personal Email (% of respondents, by age)

- 18-24: 81%
- 35+: 73%
- Total: 75%

And they tend to subscribe to a variety of marketing email lists

<table>
<thead>
<tr>
<th>Marketing Email Lists to Which US Internet Users Subscribe, Nov 2017</th>
<th>% of respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail/consumer products</td>
<td>27%</td>
</tr>
<tr>
<td>Daily deals</td>
<td>23%</td>
</tr>
<tr>
<td>Subscription services (e.g., Netflix, Birchbox)</td>
<td>19%</td>
</tr>
<tr>
<td>Health &amp; wellness</td>
<td>18%</td>
</tr>
<tr>
<td>Media &amp; entertainment</td>
<td>16%</td>
</tr>
<tr>
<td>Travel</td>
<td>15%</td>
</tr>
<tr>
<td>Banking/financial services</td>
<td>14%</td>
</tr>
<tr>
<td>Professional organizations</td>
<td>10%</td>
</tr>
<tr>
<td>Political &amp; nonprofit groups</td>
<td>8%</td>
</tr>
<tr>
<td>Other</td>
<td>14%</td>
</tr>
<tr>
<td>Don’t remember</td>
<td>18%</td>
</tr>
</tbody>
</table>

Note: ages 18+; among those who sign up for email lists
Source: Fluent LLC, "The Inbox Report: Consumer Perceptions of Email," Jan 31, 2018
After receiving a **promotional email**, roughly one-quarter of internet users take action.

### Actions Taken After Receiving a Promotional Email According to US Internet Users, by Demographic, Nov 2017

% of respondents in each group

<table>
<thead>
<tr>
<th></th>
<th>Visited a brand's store or website</th>
<th>Purchased any products or services*</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gender</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Female</td>
<td>29%</td>
<td>29%</td>
</tr>
<tr>
<td>Male</td>
<td>23%</td>
<td>22%</td>
</tr>
<tr>
<td><strong>Age</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18-34</td>
<td>26%</td>
<td>23%</td>
</tr>
<tr>
<td>35+</td>
<td>26%</td>
<td>27%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>26%</td>
<td>26%</td>
</tr>
</tbody>
</table>

*Note: in the past 6 months; *via mobile website/app, desktop/laptop or physical retail store

Source: Fluent LLC, "The Inbox Report: Consumer Perceptions of Email," Jan 31, 2018
Getting users to check and open their email can be a challenge

19% of US internet users check their personal email less than once a day

28% of US internet users rarely open marketing emails

23% of US internet users never open marketing emails

Source: Fluent LLC, “The Inbox Report: Consumer Perceptions of Email,” January 2018
Users are quick to give brands their email, but it might not be their primary account

72% of US internet users will share their email address for a shopping experience that is more tailored to their personal preferences

37% are willing to share their email address to secure an exclusive offer from a brand

31% create another email account to use when they sign up for services

Marketers and Email
Email is a **highly used and important channel for marketers**

88% of US marketers use email to interact with their customers

Another 11% plan to use email in the future

77% of US marketing execs said email is an important digital media channel

Only 6% said it was not important

Email is seen as a top ROI driver by US marketers

Digital Marketing Channel That Generates The Greatest ROI for Marketers, 2018 (% of respondents)

- Email marketing: 59%
- Social media: 21%
- Display ads: 15%
- Video: 5%
- Mobile/SMS: 1%

Source: Emma, “2018 Email Marketing Industry Report”, April 2018
The majority of in-house marketers worldwide say email is good or excellent. How do you rate email marketing as a channel in terms of return on investment? 

- **Excellent**: 30%
- **Good**: 44%
- **Average**: 21%
- **Poor**: 5%

*How Client-Side Marketers Rate ROI on Email Marketing, 2018 (% of respondents)*

*Source: Econsultancy, "Email Marketing Industry Census 2018" in association with Adestra, June 2018*
As effectiveness improves, marketers worldwide plan to spend more on email marketing.

44% of marketers said their email marketing effectiveness is improving.

37% said it is holding steady.

25% of marketers plan to significantly increase spending on email marketing in 2018.

In-house marketers worldwide saw a favorable ratio of spend on email vs. total sales.

**Total sales attributed to email channel**
- 19% in 2013
- 14% in 2015
- 19% in 2018

**Marketing budget allocation for email channel**
- 15% in 2013
- 14% in 2015
- 15% in 2018

Source: Econsultancy, "Email Marketing Industry Census 2018" in association with Adestra, June 2018
Marketers use email to **communicate** with their audience and **build brand awareness**

**Top Email Marketing Objectives for Marketing Professionals, 2018 (% of respondents)**

- Communicate with customers: 76%
- Communicate with prospects: 73%
- Build brand awareness: 70%
- Generate revenue: 52%
- Capture data on subscribers: 29%
- We don't have specific objectives: 3%
- Other: 6%

Source: Return Path, "The State of Email Marketing" in partnership with Demand Metric, June 2018
A consumer’s **email address** is a critical source of identity for marketers

“Email addresses are useful for customer identification and provide a consistent touchpoint for marketers to have a long-term connection with the recipient.”

—Stephen Driscoll, Vice President, Marketing, AARP

“A consumer’s email address is a primary identifier of identity for our clients. Couple it with CRM activity, and it is the main key in the database.”

—Justin Orgel, Director, Marketing Consulting, Cheetah Digital
Measuring Success in Email Marketing: Benchmarks and KPIs
Email KPIs defined

**Open Rate:** Total opens/emails delivered

**Unique Open Rate:** Unique opens/emails delivered

**Unique CTR:** Unique clicks/emails delivered

**Clickthrough Rate (CTR):** Total clicks/emails delivered

**Click-To-Open Rate (CTOR):** Total clicks/total opens

**Bounce Rate:** Undelivered emails/email sent
The data shows benchmark results from various email service providers by quarter.

The benchmark data presented in this section was collected from a variety of ESPs and is reflective of the activity of brands using each platform.

Our analysis will show how benchmarks vary by industry, device, geography, company size and other factors that impact email performance.
Nine in 10 in-house marketers worldwide say **CTR** is the metric used to measure email marketing success

Metrics Used to Measure the Success of Email Marketing According to Client-Side Marketers, 2018 (% of respondents)

- **Clickthrough rate**: 91%
- **Open rate**: 78%
- **Conversion rate**: 67%
- **Bounce rate**: 40%
- **Delivery rate**: 36%
- **Earnings per email**: 25%
- **List growth rate**: 21%
- **Inbox placement**: 9%
- **Brand metrics**: 9%
Open rates for six ESPs show roughly one in five consumers open an email sent by brands.

Worldwide Email Open Rates Among Select ESPs, Q1 2018 (% of emails opened)

- Epsilon: 33.1%
- Cheetah Digital: 24.9%
- IBM Watson Marketing: 22.8%
- Mailchimp: 20.8%
- SendGrid: 18.0%
- Yes Lifecycle Marketing: 14.9%

Source: Company reports from Q1 2018
CTR across six ESPs shows less than 4% of emails got clicks in Q1 2018

- Epsilon: 3.8%
- IBM Watson Marketing: 3.5%
- Cheetah Digital: 2.6%
- Mailchimp: 2.4%
- Yes Lifecycle Marketing: 2.1%
- SendGrid: 2.0%

Worldwide Email CTRs Among Select ESPs, Q1 2018 (% of emails clicked)

Source: Company reports from Q1 2018
Email Marketing Performance Metrics in North America, Q1 2017 & Q1 2018
among campaigns analyzed by Cheetah Digital

<table>
<thead>
<tr>
<th>Metric</th>
<th>Q1 2017</th>
<th>Q1 2018</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total open rate</td>
<td>27.5%</td>
<td>24.9%</td>
<td>-9.3%</td>
</tr>
<tr>
<td>—Unique open rate</td>
<td>18.0%</td>
<td>16.9%</td>
<td>-5.8%</td>
</tr>
<tr>
<td>—Click-to-open rate</td>
<td>8.9%</td>
<td>9.6%</td>
<td>8.1%</td>
</tr>
<tr>
<td>Total click rate</td>
<td>2.3%</td>
<td>2.6%</td>
<td>11.4%</td>
</tr>
<tr>
<td>—Unique click rate</td>
<td>1.7%</td>
<td>1.7%</td>
<td>0.9%</td>
</tr>
<tr>
<td>Transaction-to-click rate</td>
<td>3.4%</td>
<td>3.2%</td>
<td>-6.6%</td>
</tr>
<tr>
<td>Transaction rate</td>
<td>0.05%</td>
<td>0.05%</td>
<td>-5.5%</td>
</tr>
<tr>
<td>Revenues per email</td>
<td>$0.06</td>
<td>$0.07</td>
<td>7.0%</td>
</tr>
<tr>
<td>Average order value</td>
<td>$143</td>
<td>$152</td>
<td>6.3%</td>
</tr>
<tr>
<td>Delivery rate</td>
<td>98.3%</td>
<td>98.7%</td>
<td>0.4%</td>
</tr>
<tr>
<td>Unsubscribe rate</td>
<td>0.09%</td>
<td>0.09%</td>
<td>-1.2%</td>
</tr>
<tr>
<td>Volume</td>
<td>-</td>
<td>0.0%</td>
<td>-0.1%</td>
</tr>
</tbody>
</table>

Note: represents activity on the Cheetah Digital platform, broader industry metrics may vary
Source: Cheetah Digital, "Q1 2018 Email & Mobile Benchmark Report," July 11, 2018

From Q1 2017-2018, email campaigns sent on Cheetah Digital’s platform showed a considerable dip in open rates, while clicks, revenue per email and the average order value increased year over year. Deliverability rate remained steady with only a slight uptick.
Mobile accounts for roughly half of all opens and clicks on email, except in B2B

<table>
<thead>
<tr>
<th>Industry</th>
<th>Open</th>
<th>Click</th>
<th>Mobile</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business products &amp; services</td>
<td>76%</td>
<td>21%</td>
<td>3%</td>
</tr>
<tr>
<td>Publishers</td>
<td>50%</td>
<td>37%</td>
<td>12%</td>
</tr>
<tr>
<td>Media &amp; entertainment</td>
<td>44%</td>
<td>51%</td>
<td>5%</td>
</tr>
<tr>
<td>Consumer products &amp; services</td>
<td>44%</td>
<td>44%</td>
<td>12%</td>
</tr>
<tr>
<td>Multichannel retailers</td>
<td>39%</td>
<td>48%</td>
<td>13%</td>
</tr>
<tr>
<td>Travel</td>
<td>39%</td>
<td>43%</td>
<td>10%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>43%</td>
<td>44%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Note: represents activity on the Cheetah Digital platform, broader industry metrics may vary; numbers may not add up to 100% due to rounding.
Click share for media and entertainment and multichannel retailers is heavily mobile

<table>
<thead>
<tr>
<th>Industry</th>
<th>Desktop</th>
<th>Mobile</th>
<th>Tablet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business products &amp; services</td>
<td>88%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>Travel</td>
<td>47%</td>
<td>47%</td>
<td>6%</td>
</tr>
<tr>
<td>Consumer products &amp; services</td>
<td>45%</td>
<td>48%</td>
<td>7%</td>
</tr>
<tr>
<td>Publishers</td>
<td>41%</td>
<td>50%</td>
<td>10%</td>
</tr>
<tr>
<td>Multichannel retailers</td>
<td>34%</td>
<td>59%</td>
<td>7%</td>
</tr>
<tr>
<td>Media &amp; entertainment</td>
<td>20%</td>
<td>75%</td>
<td>6%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>39%</td>
<td>51%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Note: represents activity on the Cheetah Digital platform, broader industry metrics may vary; numbers may not add up to 100% due to rounding.

Source: Cheetah Digital, “Q1 2018 Email & Mobile Benchmark Report,” July 11, 2018

www.eMarketer.com
### Triggered messages—deployed by a consumer action—see higher performance in opens, conversions and clicks

<table>
<thead>
<tr>
<th></th>
<th>Non-triggered messages</th>
<th>Triggered messages</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Open Rate</strong></td>
<td>14.2%</td>
<td>25.1%</td>
</tr>
<tr>
<td><strong>CTOR</strong></td>
<td>8.8%</td>
<td>14.1%</td>
</tr>
<tr>
<td><strong>Conversion Rate</strong></td>
<td>3.9%</td>
<td>4.2%</td>
</tr>
<tr>
<td><strong>CTR</strong></td>
<td>1.2%</td>
<td>13.5</td>
</tr>
</tbody>
</table>

Q1 2018 email engagement metrics for non-triggered and triggered messages (among campaigns analyzed by Yes Lifecycle Marketing)

Source: Yes Lifecycle Marketing, “Q1 2018 Email Benchmarks Report,” May 2018
### Transactional vs. Nontransactional Email Marketing Performance Metrics Worldwide: Open, Clickthrough and Click-to-Open Rates, 2017

*among campaigns analyzed by IBM Watson Marketing*

<table>
<thead>
<tr>
<th></th>
<th>Transactional</th>
<th>Nontransactional</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unique open</td>
<td>44.7%</td>
<td>22.6%</td>
</tr>
<tr>
<td>Clickthrough rates</td>
<td>8.8%</td>
<td>3.3%</td>
</tr>
<tr>
<td>Click-to-open</td>
<td>17.5%</td>
<td>13.0%</td>
</tr>
</tbody>
</table>

*Note: represents activity on the IBM Watson Marketing platform, broader industry metrics may vary*

Benchmarks for opens and clicks vary by geography

### Email Marketing Performance Metrics Worldwide: Open Rate, by Country/Region, 2017
among campaigns analyzed by IBM Watson Marketing

<table>
<thead>
<tr>
<th>Country/Region</th>
<th>Open Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
<td>38.5%</td>
</tr>
<tr>
<td>Australia &amp; New Zealand</td>
<td>36.7%</td>
</tr>
<tr>
<td>UK &amp; Ireland</td>
<td>25.6%</td>
</tr>
<tr>
<td>US</td>
<td>23.1%</td>
</tr>
<tr>
<td>Europe</td>
<td>21.9%</td>
</tr>
<tr>
<td>Latin America</td>
<td>17.4%</td>
</tr>
<tr>
<td>Middle East &amp; Africa</td>
<td>16.4%</td>
</tr>
<tr>
<td>India</td>
<td>14.5%</td>
</tr>
<tr>
<td>Asia-Pacific</td>
<td>12.5%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>22.8%</strong></td>
</tr>
</tbody>
</table>

*Note: represents activity on the IBM Watson Marketing platform, broader industry metrics may vary.*


### Email Marketing Performance Metrics Worldwide: Clickthrough Rate, by Country/Region, 2017
among campaigns analyzed by IBM Watson Marketing

<table>
<thead>
<tr>
<th>Country/Region</th>
<th>Clickthrough Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia &amp; New Zealand</td>
<td>4.9%</td>
</tr>
<tr>
<td>Canada</td>
<td>4.8%</td>
</tr>
<tr>
<td>Europe</td>
<td>4.7%</td>
</tr>
<tr>
<td>UK &amp; Ireland</td>
<td>4.4%</td>
</tr>
<tr>
<td>US</td>
<td>3.0%</td>
</tr>
<tr>
<td>Latin America</td>
<td>2.5%</td>
</tr>
<tr>
<td>Asia-Pacific</td>
<td>2.3%</td>
</tr>
<tr>
<td>Middle East &amp; Africa</td>
<td>1.9%</td>
</tr>
<tr>
<td>India</td>
<td>1.3%</td>
</tr>
<tr>
<td><strong>Overall</strong></td>
<td><strong>3.5%</strong></td>
</tr>
</tbody>
</table>

*Note: represents activity on the IBM Watson Marketing platform, broader industry metrics may vary.*

Across all geographies, 62.4% of opened emails were interacted with for 8+ seconds

<table>
<thead>
<tr>
<th>Region</th>
<th>8+ seconds</th>
<th>2-8 seconds</th>
<th>Less than 2 seconds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
<td>71.1%</td>
<td>16.0%</td>
<td>12.3%</td>
</tr>
<tr>
<td>Asia-Pacific, Australia &amp; New Zealand</td>
<td>70.1%</td>
<td>17.1%</td>
<td>12.8%</td>
</tr>
<tr>
<td>Middle East, India &amp; Africa</td>
<td>69.9%</td>
<td>16.7%</td>
<td>13.4%</td>
</tr>
<tr>
<td>Europe</td>
<td>68.1%</td>
<td>17.3%</td>
<td>14.6%</td>
</tr>
<tr>
<td>Latin America</td>
<td>66.9%</td>
<td>20.1%</td>
<td>12.9%</td>
</tr>
<tr>
<td>UK &amp; Ireland</td>
<td>66.8%</td>
<td>18.7%</td>
<td>14.5%</td>
</tr>
<tr>
<td>US</td>
<td>59.7%</td>
<td>21.7%</td>
<td>18.5%</td>
</tr>
<tr>
<td>Total</td>
<td>62.4%</td>
<td>20.5%</td>
<td>17.1%</td>
</tr>
</tbody>
</table>

Note: represents activity on the IBM Watson Marketing platform, broader industry metrics may vary; read as 62.4% of emails tracked worldwide were reviewed/interacted with for 8+ seconds; numbers may not add up to 100% due to rounding

Source: IBM Watson Marketing, “2018 Marketing Benchmark Report,” June 5, 2018

Again, Canada and Australia are the regions with best email marketing performance.

The US is below average when it comes to email engagement share.
The size of your company is not a big factor in email performance across most measures.

On Mailchimp’s platform, open, click, deliverability and unsubscribe rates were relatively consistent when analyzed by company size.

Email Marketing Performance Metrics Worldwide, by Company Size, March 2018
among emails sent via MailChimp

<table>
<thead>
<tr>
<th></th>
<th>1-10 employees</th>
<th>11-25 employees</th>
<th>26-50 employees</th>
<th>51+ employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open rate</td>
<td>20.30%</td>
<td>19.74%</td>
<td>20.68%</td>
<td>22.10%</td>
</tr>
<tr>
<td>Click rate</td>
<td>2.60%</td>
<td>2.25%</td>
<td>2.56%</td>
<td>2.66%</td>
</tr>
<tr>
<td>Soft bounce</td>
<td>0.50%</td>
<td>0.54%</td>
<td>0.42%</td>
<td>0.50%</td>
</tr>
<tr>
<td>Hard bounce</td>
<td>0.30%</td>
<td>0.35%</td>
<td>0.28%</td>
<td>0.38%</td>
</tr>
<tr>
<td>Abuse rate</td>
<td>0.01%</td>
<td>0.01%</td>
<td>0.01%</td>
<td>0.01%</td>
</tr>
<tr>
<td>Unsubscribe rate</td>
<td>0.27%</td>
<td>0.23%</td>
<td>0.02%</td>
<td>0.2%</td>
</tr>
</tbody>
</table>

Note: represents activity among MailChimp clients, broader industry metrics may vary.  
Source: MailChimp as cited on company blog, March 1, 2018
When evaluating performance metrics, testing is key, but over half don’t run tests

53% of marketers said they almost never A/B test their emails

21% said they do it half the time and 11% said almost always

Source: Emma, “2018 Email Marketing Industry Report”, April 2018
By not A/B testing, marketers are missing an opportunity to learn what works

“The testing different version of an email and seeing what resonates with the audience is important. When tracking campaign benchmarks, like opens and clicks, testing helps uncover which tactics, design and language hits home with customers.”

—Amy Kilpatrick, Director, Marketing Operations, Mailchimp
Email Deliverability, List Maintenance and Permission in the Wake of GDPR
The challenges around deliverability cannot be ignored

“Deliverability is getting harder. That isn’t just being able to send email, that means keeping email out of the spam filters. Different ISPs, like Gmail, Yahoo and AOL, keep getting stricter and will block marketing messages.”

—Kyle Henderick, Senior Director, Client Services, Yes Lifecycle Marketing

“It doesn’t matter how amazing the content is, or if the segmentation strategy is great. If messages don’t get into the inbox, it is completely worthless but most brands don’t start paying attention to deliverability until it’s an issue.”

—Forest Bronzan, Executive Vice President, CRM, Email and Creative Services, Elite SEM
Marketers are using tools, like spam filters, to manage deliverability issues

68.5% of US B2C marketers are investing in email deliverability technologies

36% of marketers worldwide employ email deliverability optimization as an email marketing tactic

Overstock.com combats deliverability concerns with aggressive list hygiene practices

“Deliverability is ever-changing with inbox placement algorithms from the likes of Google becoming more complex. While we stay on top of that, we also make sure to keep our list very clean. Some retailers feel that a biyearly cleanse on their email list is satisfactory, but we clean our list every single day!”

—Brent Christensen, Director, Digital Marketing for Email and Push, Overstock.com
List cleaning practices are becoming mainstream

55% of in-house marketers worldwide do regular list cleansing

27% plan to implement regular list cleansing in the next year

Source: Econsultancy, "Email Marketing Industry Census 2018" in association with Adestra, June 2018
For AARP, list health begins with permission

“We're rigorous in permissibility. When somebody gives us their email address, the first thing we do is send out an email that asks them to click to agree that they've given us permission to use that email. That's an extra step that not all organizations take. It's one that we think, though, gives the customer a fair amount of choice and control. It also leaves us with a highly qualified list. In other words, people who are clearly interested in hearing from us.”

—Stephen Driscoll, AARP
GDPR has made permission a must; email is the most common channel used to get consent.

- **Email**: 80%
- **Online form**: 70%
- **Website notice/banner**: 48%
- **Direct mail**: 21%
- **Phone**: 19%
- **Consent management platform**: 14%
- **We don't ask for consent**: 4%
- **Don't know**: 4%
- **Other**: 3%

Channel Used by Marketers Worldwide to Obtain Customers’ and Prospects’ Consent to Use Their Data (% of respondents)

Source: Demandbase, “Data Privacy and the GDPR Benchmark Study Report” in conjunction with Demand Metric, July 31, 2018
Marketers are split on their approach to consent for GDPR

Marketers Worldwide Who Are Refreshing Consent for Customer Email Lists due to GDPR, June 2018

% of respondents

- Not refreshing consent: 30%
- Asking everyone to reconsent: 35%
- Taking a limited, country-by-country approach to refresh existing consent: 35%

Source: Demandbase, "Data Privacy and the GDPR Benchmark Study Report" in conjunction with Demand Metric, July 31, 2018
Preference centers become more common for brands aiming for permission and relevance

“Preference centers are a dynamic opportunity for brands to get their customers to self-select preferences on how they want to be messaged, what information they want and what they are interested. **It is the next level of granularity beyond opt-in and opt-out.**”

—Jason Conley, Senior Director, Sales and Solution Consulting, RRD

“**Our overall principle is to allow customer choice and control.** We offer ‘narrow subscriptions’ so subscribers can opt into very specific content and manage their preferences online or within email. **We also want their preference for email frequency.**”

—Stephen Driscoll, AARP
Are Your Emails Mobile-Ready?
Only 40% of in-house marketers say they are mobile-first; more rely on responsive design.

Steps Taken to Optimize Email Marketing for Different Devices Among In-House Marketers Worldwide, 2018 (% of respondents)

- Create responsive email template: 66%
- Adapted email design with a simple template that renders well across all devices: 59%
- Shorter subject lines: 59%
- Responsive landing pages: 55%
- Use templates with easy-to-tap calls to action: 53%
- Use pre-header test for promotion: 49%
- Thinking mobile-first in everything we do: 40%

Source: Econsultancy, "Email Marketing Industry Census 2018" in association with Adestra, June 2018
For nearly half of marketers, responsive design doesn’t mean trimming down content.

49% of marketers have a responsive design philosophy that includes the exact same content on both the desktop and mobile versions of an email.

35.3% make small changes to hide content images or design elements in the mobile version.

Source: Litmus, “The 2018 State of Email Report,” March 2018
Three ways to improve the mobile experience for email

1. Be aware of mobile's smaller screen size and tailor designs and calls to action to the mobile experience.

2. Optimize load times by limiting the amount of content that needs to render, to account for bad service or slow Wi-Fi.

3. To drive transactions and conversions, create a seamless end-to-end experience from email to web.
Crafting Relevant Messages with Data-Driven Strategies
Relevant emails result in better performance and help marketers stand out in the inbox

“If you inundate users with messages that aren’t relevant or are too broad, you won’t get good engagement or return on email. While it might seem effective in the short term, blast messages won’t get results over time. Performance metrics correlate to how relevant and valuable the information you're providing your audience is. At Vimeo, we rarely ever send the same thing to our entire list.”

—Harris Beber, CMO, Vimeo
Most in-house marketers use basic segmentation in their email marketing strategy.

82% of in-house marketers worldwide do basic segmentation.

11% are planning to implement segmentation in the next year.

Source: Econsultancy, "Email Marketing Industry Census 2018" in association with Adestra, June 2018
Segments are created based on common factors and attributes a distinct subset of the audience shares.

Popular segmentation approaches:

- Sending emails to specific groups of users based on preferences or interests
- Building user groups based on past engagement and behavioral data
Three in 10 marketers segment all of their emails, but 20% don’t do any segmentation.

What percentage of your emails are sent with a segmentation strategy?

- Almost all: 29%
- 75%
- Half: 24%
- 25%
- Almost none: 21%

Percentage of Sent Emails that Are Segmented, 2018 (% of marketers)
Producing relevant emails is impossible without data

“Data is the foundational element to understanding our email subscribers. **We want to know their behaviors, preferences and attributes so we can send relevant emails that will be relevant to them.**”

—Victoria Vaynberg, CMO, Resy

“Marketers need to have a detailed understanding of their audience data in order to use email to really move people through the journey to purchase. Data informs touchpoints, personas, and which content will resonate based on actions or demographics.”

—Amber Cooleen, Director, Marketing, IEEE GlobalSpec
Behavior-based triggers are a real-time way for marketers to send relevant emails

60% of in-house marketers worldwide will use more creative behavioral triggers to innovate their email strategy in 2018

48% of US marketers use automation to trigger email campaigns

(Half of these respondents have multiple workflows while the other half only implement a basic welcome email series)

**Personalization is happening, but still a work in progress**

- **71%** of US marketers use email content as a channel for personalized experiences.

- **53%** of in-house marketers worldwide are using automation to enable one-to-one communication.

- **35%** of global in-house marketers say doing content personalization (beyond just name) is a practice of their email marketing efforts; another **37%** plan to implement this.

- **55%** of in-house marketers worldwide say integrating data is the main challenge to implementing more personalized email.

- **39%** of US marketers say almost none of their emails are personalized, while **34%** say about a quarter of their email is personalized.

Overstock.com uses behavioral data across channels to send personalized emails

“When we have data on the customer and understand how they have been interacting with our different channels, we’re able to personalize and deliver a specific email message to that individual based on their previous engagement with us.”

—Brent Christensen, Director, Digital Marketing for Email and Push, Overstock.com
Advanced marketers are starting to experiment with **dynamic email content**

Dynamic email content, in which individual recipients receive offers or messages based on a variety of **personalized, real-time factors**, such as location, device, weather, time of day and more, at the time of the email’s open, is becoming more popular.

This sort of real-time content personalization is currently in the **experimentation phase** as there is **no standardization** across technology vendors.
Managing Email and Aligning It with the Holistic Customer Experience
Email marketers surveyed on top challenges identified several organizational issues

41% named staffing and resource constraints

17% pointed to poor coordination between other departments and channels

13% said bad strategy or leadership was the primary blocker

In-house marketers worldwide dedicate the most time to **email design and content**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Up to 2 hours</th>
<th>2-8 hours</th>
<th>8+ hours</th>
<th>None</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transmission</td>
<td>35%</td>
<td></td>
<td>46%</td>
<td>18%</td>
</tr>
<tr>
<td>Reporting</td>
<td>66%</td>
<td>14%</td>
<td>5%</td>
<td>15%</td>
</tr>
<tr>
<td>Data</td>
<td>57%</td>
<td>27%</td>
<td>10%</td>
<td>6%</td>
</tr>
<tr>
<td>Strategy and planning</td>
<td>55%</td>
<td>24%</td>
<td>15%</td>
<td>6%</td>
</tr>
<tr>
<td>Mobile optimization</td>
<td>54%</td>
<td>14%</td>
<td>2%</td>
<td>30%</td>
</tr>
</tbody>
</table>

*Note: n=362; internally
Source: Econsultancy, "Email Marketing Industry Census 2018" in association with Adestra, June 25, 2018*
Email marketing has become part of the larger marketing team's efforts

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Team, as part of wider marketing responsibilities</td>
<td>38%</td>
<td>34%</td>
<td>40%</td>
<td>45%</td>
<td>46%</td>
</tr>
<tr>
<td>Individual, as a part of wider marketing responsibilities</td>
<td>40%</td>
<td>37%</td>
<td>31%</td>
<td>30%</td>
<td>27%</td>
</tr>
<tr>
<td>Team dedicated to email marketing</td>
<td>8%</td>
<td>12%</td>
<td>11%</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>Individual dedicated to email marketing</td>
<td>10%</td>
<td>13%</td>
<td>14%</td>
<td>8%</td>
<td>11%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
<td>2%</td>
<td>3%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>None</td>
<td>2%</td>
<td>2%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Note: 2014 n=541; 2015 n=451; 2016 n=589; 2017 n=664; 2018 n=389
Source: Econsultancy, "Email Marketing Industry Census 2018" in association with Adestra, June 25, 2018
Email as a strategy and function, needs to align with the larger marketing goals

“Email is typically the center of the marketing hub. It feeds other emails and there is a tight coordination between email and display, push, SMS and more. ”

—Kara Trivunovic, Senior Vice President, Digital Solutions, Epsilon

“Email needs to fit into the larger marketing ecosystem. In order to execute good email marketing, there needs to be involvement from departments across the organization. Everything must tie back to larger company goals. ”

—Amber Cooleen, Director, Marketing, IEEE GlobalSpec
Reach the customer at the right touchpoint (HINT: it might not be email)

“Cross-channel coordination means we are thinking beyond email. It’s email, SMS, app and browser push, display and more. To give the customer the right channel and touchpoint, we have united our marketing department and strategy to reach our audience beyond the inbox.”

—Brent Christensen, Director, Digital Marketing for Email and Push, Overstock.com
Email Technology on the Horizon
More in-house marketers in 2018 see the benefits of using AI to improve performance

<table>
<thead>
<tr>
<th>How Can Artificial Intelligence Improve Email Marketing Performance According to In-House Marketers Worldwide? 2017 &amp; 2018</th>
<th>% of respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Optimize send times</td>
<td>2017: 52%</td>
</tr>
<tr>
<td>Optimize calls to action</td>
<td>2017: 43%</td>
</tr>
<tr>
<td>Improve subject line copy</td>
<td>2017: 35%</td>
</tr>
<tr>
<td>More efficient use of resources</td>
<td>2017: 35%</td>
</tr>
<tr>
<td>Improve email copy</td>
<td>2017: 29%</td>
</tr>
<tr>
<td>Other</td>
<td>2017: 1%</td>
</tr>
</tbody>
</table>

Note: 2017 n=547; 2018 n=295
Source: Econsultancy, "Email Marketing Industry Census 2018" in association with Adestra, June 25, 2018
Most aren't yet using predictive tech, but a third are trying it for scheduling/frequency

<table>
<thead>
<tr>
<th>Implementation of Predictive/Intelligent Solutions* for Select Marketing Processes According to In-House Marketers Worldwide, April 2018</th>
<th>% of respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Scheduling/frequency of email</strong></td>
<td>9%</td>
</tr>
<tr>
<td><strong>Language/wording</strong></td>
<td>7%</td>
</tr>
<tr>
<td><strong>Content</strong></td>
<td>6%</td>
</tr>
<tr>
<td><strong>Product selection</strong></td>
<td>5%</td>
</tr>
</tbody>
</table>

- Fully implemented
- Partially implemented/trialed
- Considered, but not used yet
- Not considered

Note: n=311; *including artificial intelligence
Source: Econsultancy, "Email Marketing Industry Census 2018" in association with Adestra, June 25, 2018

240533
Only a small percentage of email marketers are implementing interactive email.

Has your company ever used interactive elements in its email marketing?

<table>
<thead>
<tr>
<th>Yes, but we don't have plans to use it again soon</th>
<th>No, and we don't have plans to try anytime soon</th>
</tr>
</thead>
<tbody>
<tr>
<td>10%</td>
<td>48.9%</td>
</tr>
<tr>
<td>Yes, and we will again soon</td>
<td></td>
</tr>
<tr>
<td>No, but we plan on trying soon</td>
<td>36.8%</td>
</tr>
</tbody>
</table>

Use of Interactive Email Elements, 2018 (% of email marketers worldwide)

Source: Litmus, 2018 State of Email Report," March 2018
Most commonly implemented interactive features in email

Source: Litmus, “2018 State of Email Report,” March 2018

Interactive Features Used in Email, 2018 (% of email marketers worldwide)
Interactive email is hard to execute, but marketers see the benefits

“Kinetic, or interactive email, takes more time to design, code and QA, but it can be a way for brands to put more content inside of their email in a way that is creative and with a good interactive experience for the recipient.”

— Kara Trivunovic, Senior Vice President, Digital Solutions, Epsilon

“Creating interactive emails requires a lot more additional work which is a challenge for marketers but with Google AMP pages and similar functionality from other providers, marketers can give their audience website functionality within emails.”

— Kyle Henderick, Senior Director, Client Services, Yes Lifecycle Marketing

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Can email evolve to a transaction channel?

“Email has historically been a traffic channel but we see email moving away from that, into a transaction channel. As interactive email fully transitions, we will have seamless buy buttons and full browser-based web functionally within the body of the email, making conversions easier since everything can be done within the email and consumers don’t have to leave that experience to complete the call to action.”

— Allen Nance, Global CMO, Emarsys
Additional Resources

**Interviews**

Harris Beber, CMO, Vimeo

Forest Bronzan, Executive Vice President of CRM, Email and Creatives Services, Elite SEM

Brent Christensen, Director, Digital Marketing for Email and Push, Overstock.com

Jason Conley, Senior Director, Sales and Solution Consulting, RRD

Amber Cooleen, Director of Marketing, IEEE GlobalSpec

Stephen Driscoll, Vice President of Marketing, AARP

Tilman Eberle, Vice President, Marketing, Doodle AG

Kyle Henderick, Senior Director, Client Services, Yes Lifecycle Marketing

Jonathan Kateman, General Manager, Constant Contact

Amy Kilpatrick, Director of Marketing Operations, Mailchimp

Matt McGowan, President, Adestra

April Mullen, Director, Consumer-First Marketing Adoption, Selligent

Allen Nance, Global CMO, Emarsys

Justin Orgel, Director, Marketing Consulting, Cheetah Digital

Tom Sather, Senior Director, Research, Return Path

Linda Uslaner, Senior Director, Product Management, IEEE GlobalSpec

Victoria Vaynberg, CMO, Resy
Additional Resources

**Related Reports**

- General Data Protection Regulation (GDPR): What Companies Need to Know Now
- Customer Experience 2018: Personalization Still Elusive as Marketers Seek Answer to Single View of Customer
- Global Digital Users 2018: Over 80% of Internet Users to Log Online via Mobile Phone
- Understanding Customer Engagement: How to Map and Make Sense of the Metrics that Matter

**Related Interviews**

- Marketers’ Roundtable: Brands Need to Send Fewer Emails, So Why Aren't They?
- Marketers’ Roundtable: How Four Brands Use Data to Increase Email Open Rates and Engagement
- How AARP Uses Email to Give Consumers a Better Brand Experience
Additional Resources

Sources

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Demand Metric
Demandbase
Econsultancy
Emma
Epsilon
Evergage
Fluent LLC
IBM Watson Marketing
Kelton

Litmus
Liveclicker
MailCharts
Mailchimp
Nielsen
Radicati
Researchscape International
Return Path
SendGrid
SmarterHQ
Target Marketing
Yes Lifecycle Marketing