Consumer Email Tracker

2023

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Customer Engagement

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/ Introduction

Depending on how you view these things, the cost-of-living crisis has either presented a crisis in marketing effectiveness, or it has created an environment of profound opportunity for marketers. While squeezed consumer wallets have made it harder to elicit a specific acquisition or sale in response to marketing comms, the need to nurture customers through difficult times becomes a role of fundamental importance for brands. The email channel arguably offers unrivalled effectiveness in fulfilling this role.

Now running for its seventh year, the DMA's Consumer Email Tracker measures consumer preference for email throughout the customer journey: from pre-purchase (e.g. discounts, offers, product information or reviews); to post-purchase (e.g. receipts; order confirmations and delivery details); and from customer service messages to the delivery of additional benefits (such as competitions and events). Across the board, email is rated top by consumers.

There is arguably a confluence of perfect industry trends which have aligned to the benefit of the email channel, namely:

1. In an era of media saturation, ad avoidance is on the rise. When the likes of P&G's Marc Pritchard urge the market to think carefully about the over-delivery of marketing comms to increasingly weary consumers, marketers should realise that campaign efficiency and effectiveness are both at stake. With email occupying a discrete compartment in consumers' lives that can be logged into - and out of - at their discretion, email arguably doesn't fall foul of the same issues that more pervasive advertising does.

2. The new Data Protection and Digital Information Bill (DPDI) is the successor to GDPR that will provide businesses with additional pro-growth opportunities while maintaining a high standard of protection for customers. One of the most significant reforms is the greater clarity offered on what constitutes a legitimate interest, which will encourage more businesses to use it as a lawful basis for data processing where appropriate. This is potentially a huge opportunity for email as a tool for business growth.

3. With third-party cookies finally on their way out in 2024, there will be renewed emphasis on the use of first-party data to drive highly targeted and effective digital comms. Combined with the potential threat to the digital advertising ecosystem presented by ChatGPT's potentially game-changing partnership with Bing, email could well benefit from a surge in interest from advertisers looking for viable alternatives.

This context provides the backdrop for the DMA's Consumer Email Tracker. This year readers will notice profound shifts in the use of email at work; the use of mobile to access email; the use of separate personal and marketing email inboxes; and to the credit of email practitioners, an increase in consumer email utility.

Special thanks must go to our sponsor, Deployteq, without which this report would not have been possible, along with the DMA's Email Council research hub for their input and oversight.

We hope you enjoy the read!

Ian Gibbs
Insight and Planning Director, DMA UK

/ Foreword – Deployteq

At Deployteq, we’re incredibly honoured to have taken part in this years’ report. As a marketing automation platform with 23 years of experience, we understand the importance of data-driven marketing. The information provided over the coming pages is gold-dust to any marketer.

The Email Consumer Tracker 2023 report offers valuable insights into how consumers view email and how the data and marketing industry can improve their strategies. The report highlights the growing importance of email marketing as a preferred one-to-one channel for delivering pre- and post-purchase messaging, customer service updates, and exclusive content and events. With the memory of the Covid-19 pandemic still fresh, the report emphasises the need for brands to consider different email strategies for personal and work email addresses. The number of work email addresses has grown significantly, meaning it's more important than ever that brands and marketers consider different email strategies for personal and work email addresses to target their audience effectively.

What's evident from this year's findings is that consumers are increasingly curious about how companies acquire their email addresses—over one-third of consumers are wondering about their email addresses' source. It's now more apparent that companies need to be entirely transparent in their communications.

Mobile is more prominent than ever in this year's statistics. We see trends even more in favour of mobile as internet data becomes more accessible and the need for immediate gratification rises, (it's easier to check emails on a phone than on a laptop!) giving us deep insights into the lives and behaviour of the people we’re marketing to. Having a user-friendly platform that spans across multiple channels such as WhatsApp, mobile app, SMS and email, helps to tailor your communications directly to customer preferences in a few clicks and is now more important than ever.

The report also emphasises the importance of brand recognition and the main drivers of email open rates. Recognisable brand logos and emails from a named person at a company are particularly effective. Good personalisation that doesn't feel invasive is essential, and brands should prioritise understanding their customers to create and deliver content that genuinely resonates with them. It’s imperative for marketers to have a no-code solution that enables them to make these personal touchpoints without cumbersome technical hurdles and expensive consultation costs.

The 2023 Email Consumer Tracker report provides insightful data and analysis that can help businesses improve their email marketing strategies. The report's findings demonstrate that email marketing remains essential for delivering effective messaging to customers. We at Deployteq would like to extend our gratitude to the DMA for allowing us to contribute to the report's development and be part of the effort to understand better consumer sentiment towards email and how the industry can continue to improve. We hope this report will be valuable to you and your organisation as you strive to improve your most valuable channel: email marketing.

Pauline Buil
Marketing Director at Deployteq

/ Foreword – Email Council

My day job at Validity involves working with major brands around the world to help them maximise the inbox placement of their marketing emails. A key part of great deliverability comes from the way subscribers engage with their emails. Positive behaviours like opens, clicks, and even the use of “not spam” send a signal to mailbox providers like Gmail and Microsoft that these emails are wanted and valued.

But achieving this isn’t easy. While email marketers are often ideas-rich, they are invariably time-poor. The constant pressure to get the next campaign out the door means that while they hope their emails are relevant and engaging, they can’t always be certain their customers’ share that view! Helping them deal with this challenge is the *raison d’etre* for the DMA’s Email Council, and the Consumer Email Tracker is one of our most important outputs.

When I work with senders, my first piece of guidance is to spend some time walking in their subscribers’ shoes. To help them start the journey I show them this report. It’s one of my favourite pieces of research, and one of the things I most love is its ability to challenge long-held assumptions. For example:

- Just because you have digital proof of opt-in, don’t assume your email subscribers remember signing up for your program. They *do not*!

- A great subject line is *not* the main reason your emails get opened. Recognition of you as a trusted sender is far more important.

- Email subscribers *do* check their spam folders – regularly. Make sure your emails stand out so they can be recovered to the inbox.

A big part of email’s value is its measurability, and your performance metrics tells you exactly *how* your subscribers are behaving . . . but not necessarily *why.* That’s where this report comes into play – highlighting their motivations for signing up, how they use their email addresses and devices, and how much attention your carefully crafted messages really receive.

Better understanding of how your subscribers interact will help produce better emails that get delivered, fire up engagement, and maximise revenue for your business. Start that journey in your subscriber’s shoes today . . . by turning over to the next page.

On behalf of the Email Council team that helped prepare this report, happy reading!

Guy Hanson
Deputy Chair of the Email Council
VP of Customer Engagement at Validity
(www.validity.com)

/ Exec Summary

1. Email is still the champion for one-to-one comms: Consumers rank email first - ahead of all other marketing channels for pre-purchase (e.g. discounts, offers, product information or reviews); post-purchase (e.g. receipts; order confirmations and delivery details); customer service messages and the delivery of additional benefits (such as competitions and events).

2. Email utility is on the rise and click-through follows suit: A growing number say they find brand messages they receive via email useful: in 2021 the figure was just 15%, but it's now 32%. Click-through rates have risen across all types of email comms.

3. Blurred lines between professional and personal inboxes: In 2021, 50% of consumers revealed they did not have a work email address. That figure now stands at just 23%.

4. Consumers consciously separate branded and personal emails: Today, 37% of consumers say they keep personal and marketing emails separate by using different inboxes, a significant jump from 23% in 2021.

5. Mobile preference for checking emails: 79% of respondents use their mobile to receive email communications from brands, shops and websites - ahead of using desktop / laptops PCs, which led the way in 2021.

6. Consumers check their inboxes on their own terms: The share of consumers who check their main inbox at least daily has risen from 63% to 66% during the past two years. The proportion of consumers who check junk mail at least once a week has increased from 25% to 29%.

7. Consumers have a limited list of "best-friend" brands: Individuals are registered with an average of around 10 brands, stores or websites to receive marketing emails. Receiving discounts and promotions tops the list of reasons people register to get emails (48%).

8. Email in the era of consumer attention: Consumers are becoming more selective about which emails they pay attention to: those opening more than half the marketing messages they receive in their inbox has dropped to less than a third (32%), from 38% in 2021. However, once opened, consumers read their emails for an average of 11 seconds per email.

9. Accessibility is a critical concern for email marketers: A large majority of consumers find marketing emails easy to understand. More than a third (36%) say colour, design, fonts and headings add to the accessibility of messages they receive, so that they understand them very easily.

10. Removing the friction from unwanted subscription: A majority of consumers who unsubscribe from receiving an organisation's emails say they do so because they get too many (57%). Using an unsubscribe link is the preferred method of unsubscribing.

/ 1. Email is still the champion for one-to-one comms

For many consumers and businesses alike, the end of pandemic restrictions has been a case of out of the frying pan into the fire as the UK lurches from a health emergency to an economic crisis.

In tough times, consumers turn to brands they trust. This first post-pandemic wave of research around consumer email actions and attitudes offers key insights into the enduring power of the channel to deliver trusted messages and brand loyalty.

The survey asked about 12 different touchpoints in the customer journey, then grouped these into broader categories as follows:

- **Pre-purchase:** Discounts, offer or sales; advice, information or reviews; new products or services
- **Post-purchase:** Receipts; order confirmations or delivery updates; tutorials /user guides
- **Customer service:** Customer service (e.g. account/service information or local updates); appointments/reminders (e.g. birthdays or booked appointments/event)
- **Additional benefits:** Competitions; events (either in-person or virtual); exclusive content (e.g. articles, photos, videos); access to other brand/shop/site benefits

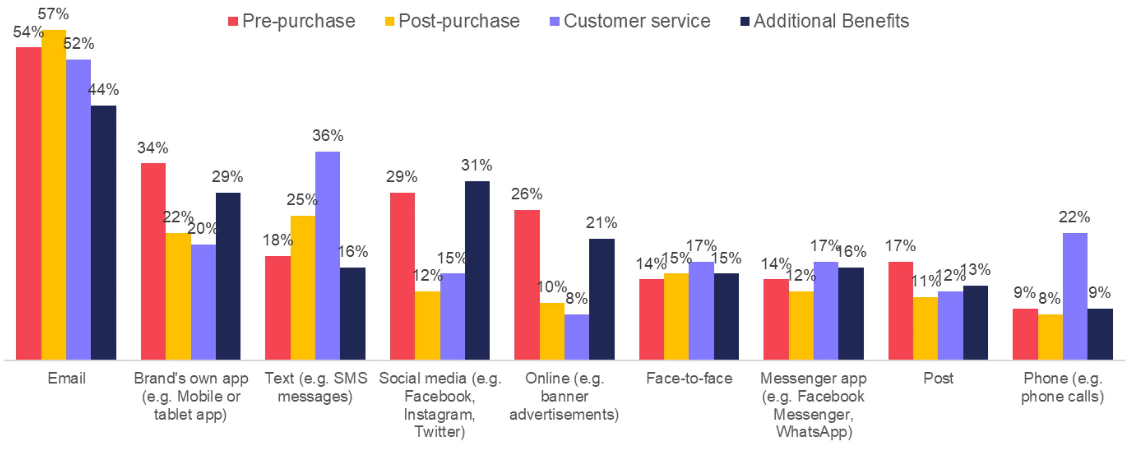
Email maintains a significant lead over other channels for both pre- and post-purchase communication. Just as in 2021, consumers rank email first for receiving marketing messages about discounts, offers and sales (64%); new products/services (53%); and advice, information and reviews (44%).

Email is consumers' preferred channel for post-purchase communications including order confirmation (69%), receipts (65%) and user guides or instructions (36%).

In addition, consumers point to email as the best channel for customer service (53%), ahead of brand apps, face-to-face interaction and text message. More than half of all consumers (52%) also want to discover additional benefits - such as exclusive content or brand competitions - via email.

Brand apps were the second preference for pre-purchase and for additional benefits, whereas text/SMS was second for post-purchase and customer service.

Which of these types of subject would you agree are best served by the following communications methods?

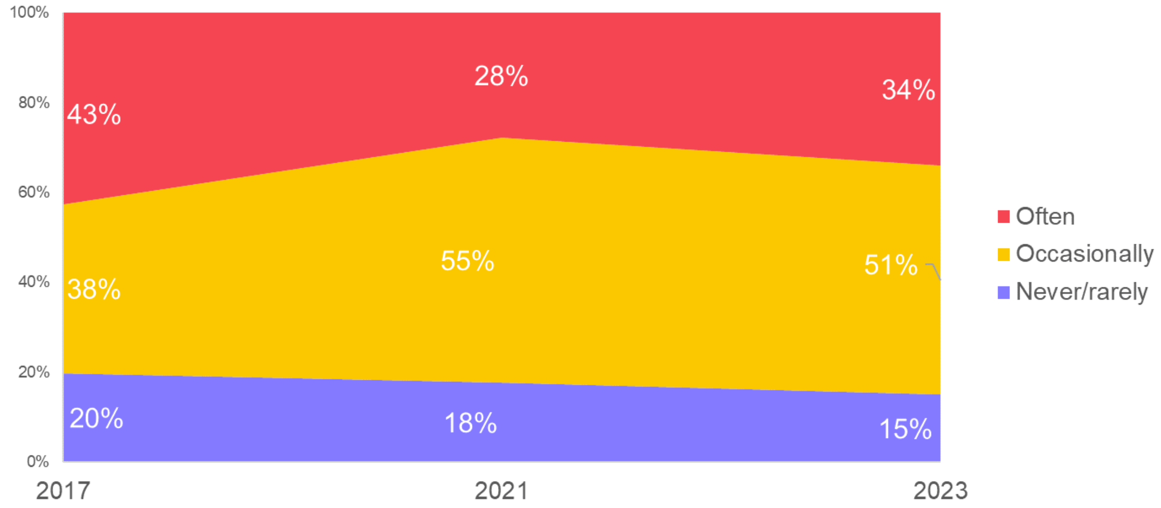


There has been an uptick since 2021 in the share of consumers who are keen to understand how brands have obtained their email address. Around a third (34%) say they often wonder about this, compared to 28% in 2021. This is potentially a consequence of "soft opt-in" processes where consent is assumed when an email address is acquired in the course of negotiations that lead to a sale. Brands should look to offer greater transparency around this process so that consumers are clear that they will receive marketing emails as a result of soft opt-in.

Additionally, it is worth noting that consumers must provide their email address and opt in to the privacy policy to gain access to free Wi-Fi in public places. This is more relevant than ever in the age of hybrid working.

Older consumers are most likely to consider how their email address was obtained. Some 30% of respondents aged from 55 to 64, and 28% of those aged 65-plus, claim they often wonder how an organisation was able to contact them. In contrast, just 14% of 18- to 24-year-olds do so.

How often do you wonder how brands / shops got your email address?



Takeaways for brands and email marketers

1. Email stands out as consumers' channel of choice at every point of the purchase journey, serving their needs across multiple contexts. But email shouldn't sit in a silo: it's most effective when used in conjunction with complementary channels that also score highly for pre- and post-purchase communication, and customer service - ranging from face-to-face contact, to apps and social media.

2. One in three consumers want to know how brands got their email address. This level of concern might have been expected in the wake of GDPR. A likely explanation is that more consumers are signing up for e-receipts and other notifications at checkout; they may not be aware they are also agreeing to opt in to email communications. It is therefore crucial for brands to review their opt-in process and be as transparent as possible in every message. Not least because the forthcoming changes to the use of third party cookies will make collecting first-party data even more important for marketers' contact strategies.

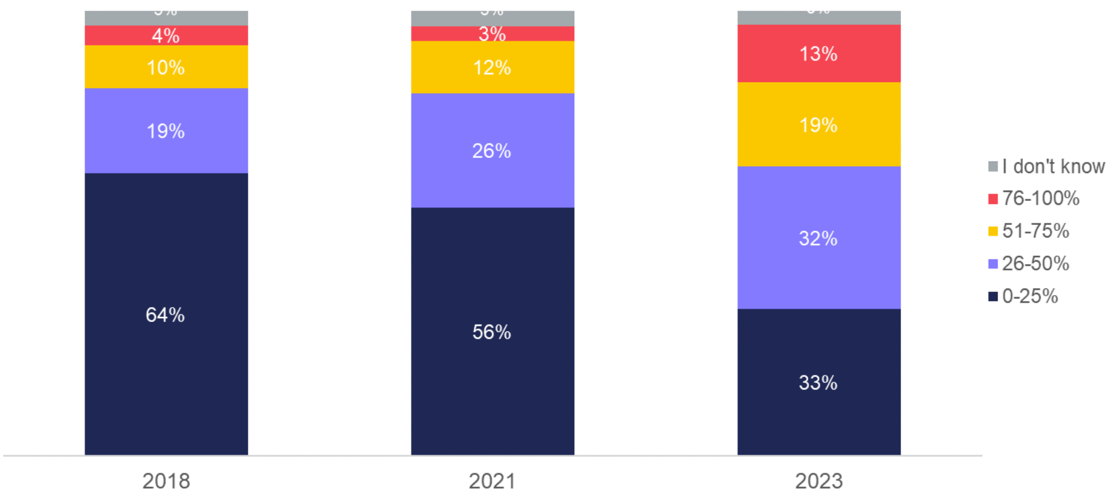
3. In addition, revised e-privacy laws are set to tighten up soft opt-in so it can *only* be used when an *actual* purchase is made (in other words, the condition relating to "in the course of negotiations that may lead to a sale" will be removed).

2: Email utility is on the rise, and click-through follows suit

While consumers are choosy about marketing emails they engage with, a growing number say they find brand messages they receive useful.

In 2021, just 15% found at least half their emails useful. Now, that figure stands at 32%.

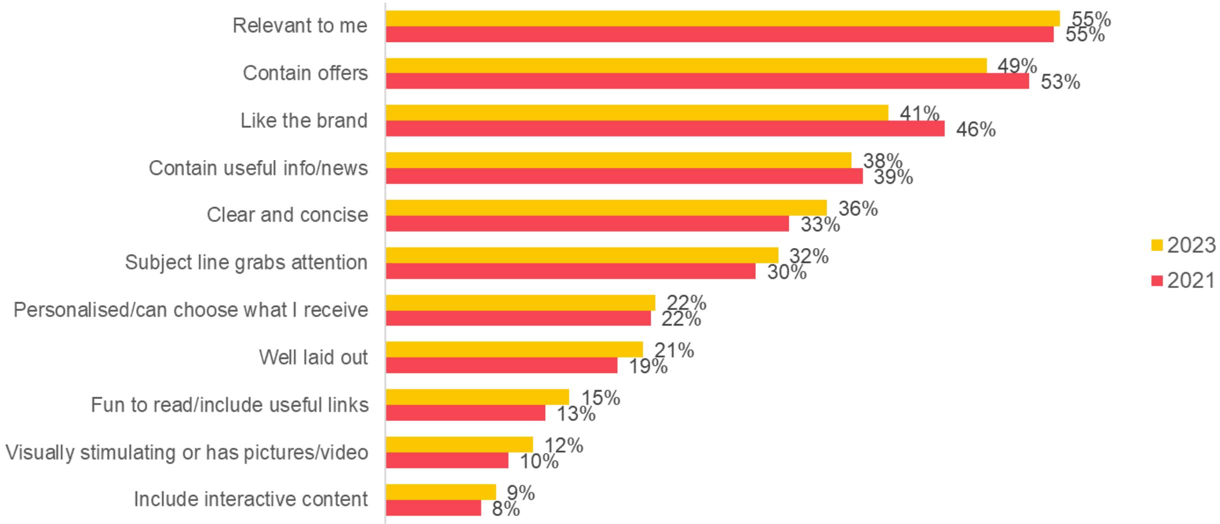
What percentage of email do you consider useful to you?



Consumers certainly value features they find useful, such as helpful information (38%) and links (15%). But relevance retains the top spot in the reasons why they like emails they receive.

This is crucial, because relevance can have a hugely positive effect on click-through rates.

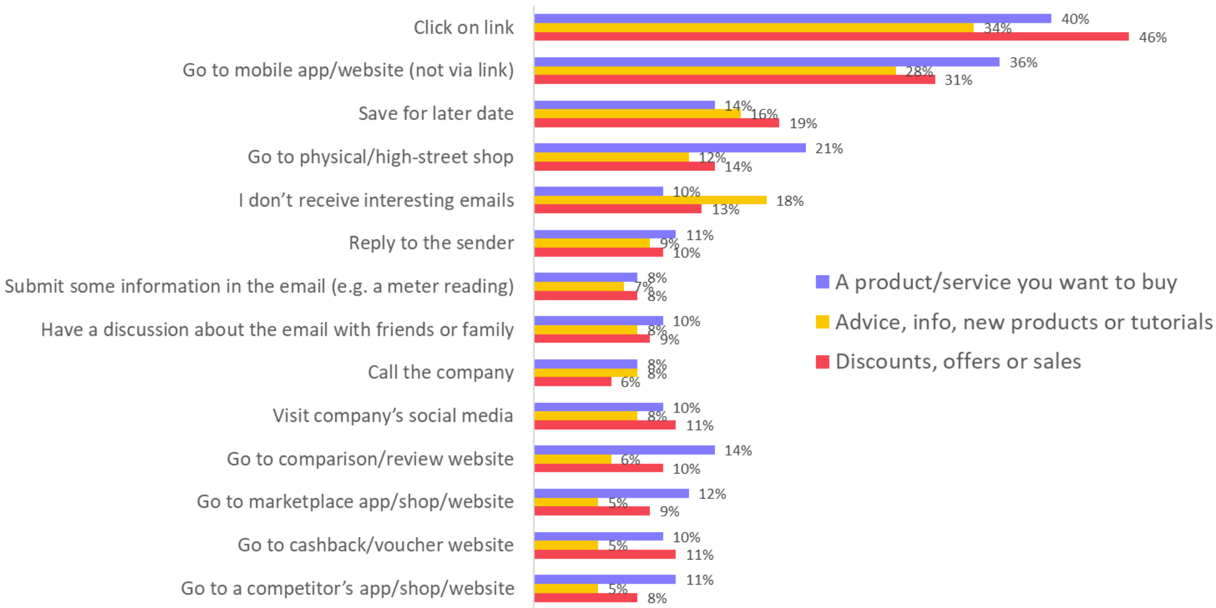
Reasons why consumers like emails received from brands / shop / websites



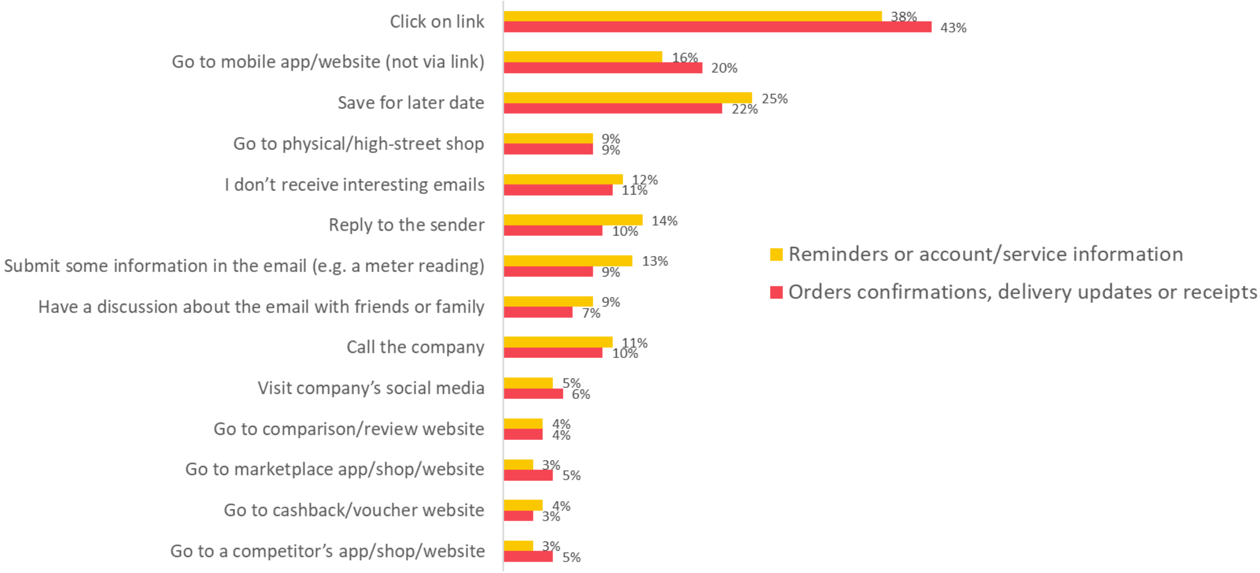
Clicking on a link in an email is the predominant action consumers take, whether they receive the message before or after a purchase. Furthermore, clicks have increased significantly year on year.

But it's by no means the only thing they do. Many consumers are eager to check out the brand's website or app on their own terms, without clicking through the emailed link. Around a fifth (21%) receiving a message from a brand that interests them are prompted to head in-store to investigate the product or offer further. Around one in 10 like to discuss the content of the email with their family or friends.

Actions most likely to take with interesting emails (pre-purchase)

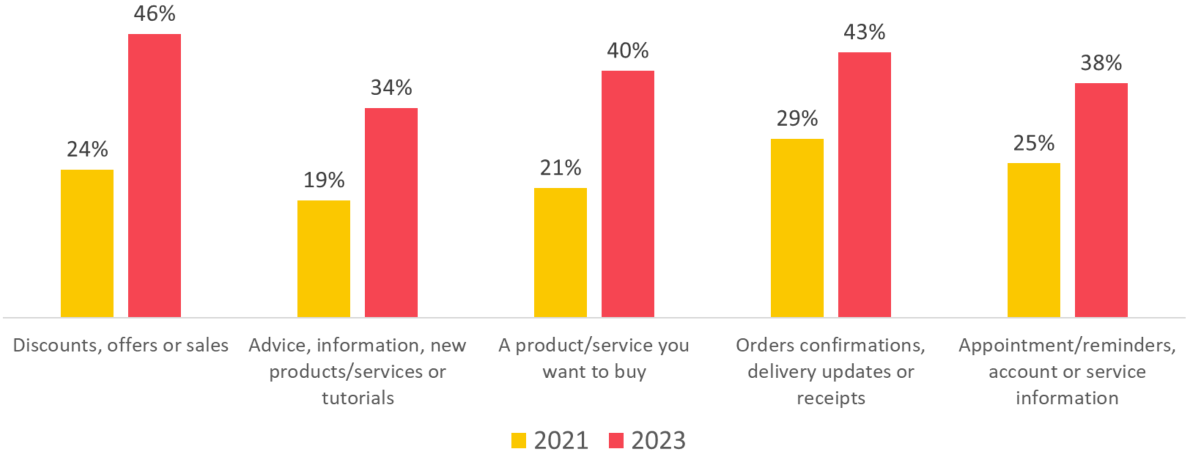


Actions most likely to take with interesting emails (post-purchase)



Apple's recent deployment of Mail Privacy Protection (MPP) has depreciated the value of open rates, leading to many senders placing a greater emphasis on clicks as their primary measure of engagement. They have achieved this by making click-through opportunities more visible; easier to use; and by including more of them in their emails. This in turn is the likely driver of the massive increase in emails found useful because clicks are a far more solid measure of engagement than opens. Simply put, optimising to the right metrics produces more meaningful results for brands and consumers.

Year-on-year increases in clicks on emails for…



Email is a key part of a consumer's omnichannel journey. It drives both digital actions and real-world activity in-store. Despite current economic headwinds high-street stores are shutting up shop at the slowest rate in a decade. Consumers still crave physical shopping experiences, and email can be a catalyst to drive footfall.

Takeaways for brands and email marketers

1. It's a tonic for marketers that a growing share of consumers feel a good proportion of emails they receive are useful. Inboxes remain crowded, so complementing utility with good design, content, offers and other added value features can help build cut-through.

2. A shift in focus from optimising away from open rates, and instead focusing on click-through rates, is a key consideration for email marketers. Click-through opportunities should be clear, visible, easy to use and have genuine utility for consumers.

3. While clicking on a link is the most popular action across emails at different stages of the purchase journey, consumers take many other actions - reflecting the influence of email in driving other positive commercial outcomes.

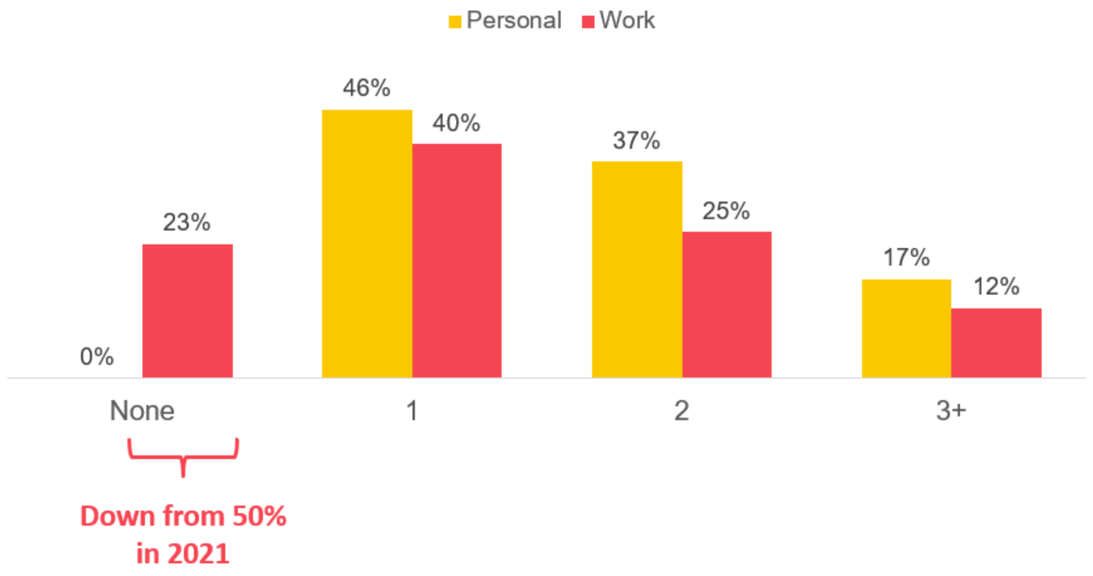
3. Blurred lines between professional and personal inboxes

The pandemic forever altered our relationship with work. Many people changed careers, some have struggled financially and taken on multiple jobs. Meanwhile, the rise of hybrid and remote working seems here to stay.

All of this has accelerated the use of professional email accounts to receive brand communications.

In 2021, 50% of consumers revealed they did not have a work email address. That figure now stands at just 23%.

How many email addresses do you have?



In addition, the volume of work email addresses per person has doubled, with consumers averaging 1.3 of these today compared to 0.6 in 2021. Digging into the data gives us a profile of the consumers who are driving the increase in usage of multiple professional email accounts:

- Consumers aged from 18 to 34 are 22% more likely than average to have multiple work email addresses
- Individuals who live in urban areas are 11% more likely - rising to 16% for those in London
- They most frequently use Apple Mail and iCloud accounts for email
- Consumers who use separate email addresses for marketing and personal messages are 65% more likely to have multiple work addresses

There appear to be three main factors behind the increase in work email accounts:

1. First, the pandemic forced - or persuaded - more workers to go freelance, take on multiple jobs and tap into the gig economy; hence the need for several email addresses.

2. Second, those going through a career change may have turned to a new email account to keep professional communications separate from their personal inbox.

3. Third, the long-term trend of the UK becoming a service economy continues, meaning more people require a professional email address as part of their role. Businesses are investing heavily in workforce data literacy because it's such an important part of modern commerce.

Takeaway for brands and email marketers

1. Only half of the UK population had a work email address in 2021; now more than three quarters do. It can only be a matter of time before the share of consumers who are comfortable receiving marketing emails to these accounts hits critical mass.

2. Furthermore, the lines between home and work emails are increasingly blurred, not least because it’s possible to access all addresses via a single app. This inevitably changes brands’ email strategies - understanding how to send to the right address, with the right message, at the right time of day.

3. Multiple professional email address users predominantly have Apple Mail and iCloud accounts. Because Apple MPP encourages a focus on clicks rather than open-rates, marketers should consider clear, actionable and relevant calls to action on this basis.

4. Consumers consciously separate brand and personal emails

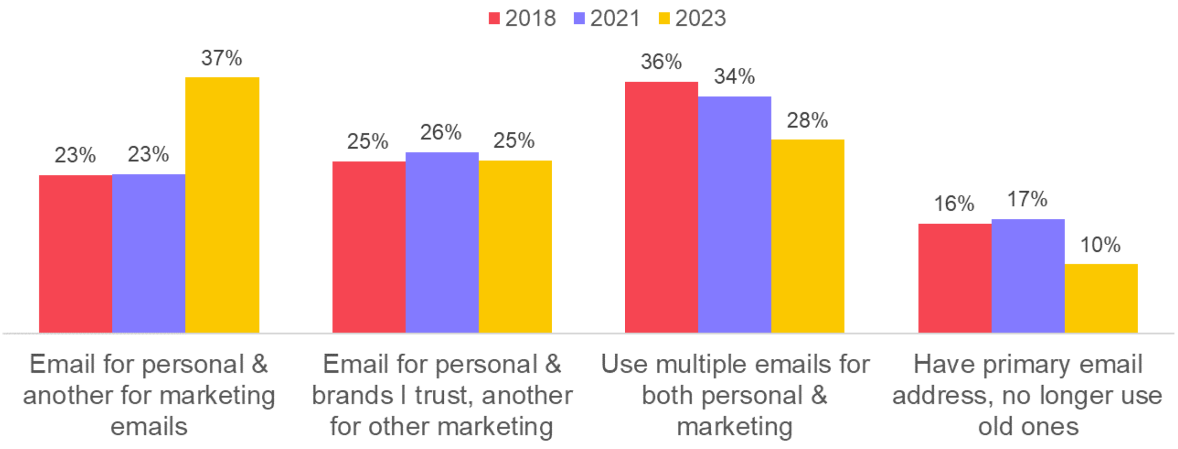
The use of different inboxes for personal emails and marketing emails is on the rise. In the age of ad saturation, avoidance of brand messages across channels is becoming more common due to consumer behaviours such as ad blocking and time-shifted viewing. Email isn't immune: ad exposure can be controlled by the consumer, switched on or off at their discretion and occupying a discreet part of their lives.

Today, 37% of consumers say they keep personal and marketing emails separate, a big jump from 23% in 2021. Half of all 18- to 24-year-olds split email addresses this way; in addition, 39% of women do - compared to 34% of men.

A quarter of consumers go even further. They use a specific email address to receive marketing emails from "best friend" brands - the ones they trust the most. Consumers aged from 25 to 34 are most likely to do this (37%).

Meanwhile, 28% of consumers reveal they use multiple email addresses to receive both personal and marketing communications. One in 10 overall (increasing to 25% of consumers aged 65 and above) have a single, primary address which they use for all emails; they have abandoned other accounts.

How do you use your different personal email addresses?



Takeaways for brands and email marketers

1. Consumers are becoming hyper-organised about where and how they filter certain types of emails, depending on their nature. They often have a primary address for information they most value; a secondary address for brands they like but wish to keep separate; and a tertiary address for "everything else". It will be vital for brands to understand not only how these findings can be combined with other insights such as frequency of checking email accounts,

and communication preference throughout the purchase journey - but also to consider how to get on the “best friend” list and potentially gain access to these primary addresses.

2. It is important to realise that while consumers say they have multiple email addresses, and each serves a different purpose, new services from email providers are changing the picture. Some - including Apple - allow infinite addresses to be used. Consumers can take advantage to effectively have one per brand, so the email marketing landscape may be more complex than it seems.

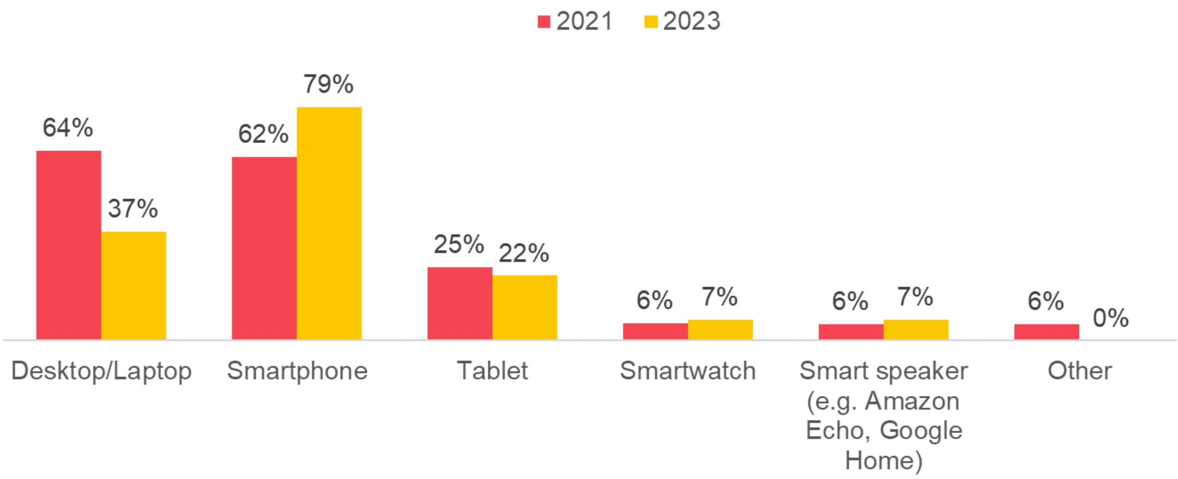
3. Additionally, it is worth noting that many marketers want to get their emails out of the Gmail Promotions tab and into the main inbox. However, consumers may be quite happy with promotional emails staying where they are as this provides a very neat solution to keeping overcrowded inboxes organised.

5. Mobile preference for checking emails

The DMA's previous Consumer Email Tracker was published mid-pandemic in 2021. Perhaps unsurprisingly with so many people working from home at that time, desktop and laptop computers were the leading method for checking emails - ahead of mobile phones.

The position has now switched: we're already well past the mobile tipping point. Today, 79% of respondents use their mobile to receive email communications from brands, shops and websites. This figure rise to 87% for consumers aged from 18 to 24. The figure stands at 83% for women compared to 75% for men (likely a reflection of women's comparatively higher time-spent accessing the mobile internet overall according to UKOM).

Devices used most often to access personal email address to receive message from brands / shops / websites



Several aspects of mobile phone use explain why they are the preferred channel for checking emails:

- The ability to consolidate multiple email addresses/accounts using apps
- User journeys have improved, and there is now less friction in the customer journey from clicking an email link to landing on the most relevant web page
- On-the-go connectivity is generally improving, such as on public transport and urban areas, meaning that it is easier to conveniently check emails
- Consumers are arguably more switched on to mobile preferences and more adept at managing alert preferences in relation to email

Takeaways for brands and email marketers

1. Brands and marketing agencies are getting better at creating unique, engaging content. But their designs will need to get even more eye-catching and mobile-ready as competition increases for email users' attention.

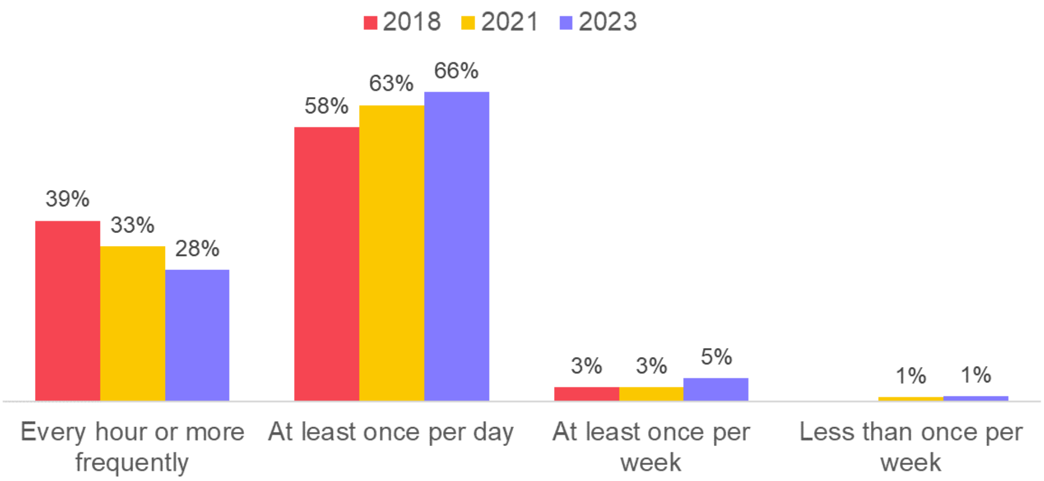
2. Phone screen size is growing, increasing the accessibility of email content. Marketers are not only better at producing more mobile-optimised content, but are also considering the needs of visually impaired readers (see Chapter 8 of this report along with the DMA's Email Accessibility Guide, which can be found here).

6. Consumers check their inboxes on their own terms

In the era of marketing saturation, email offers consumers a unique opportunity to control when and for how long they absorb messages.

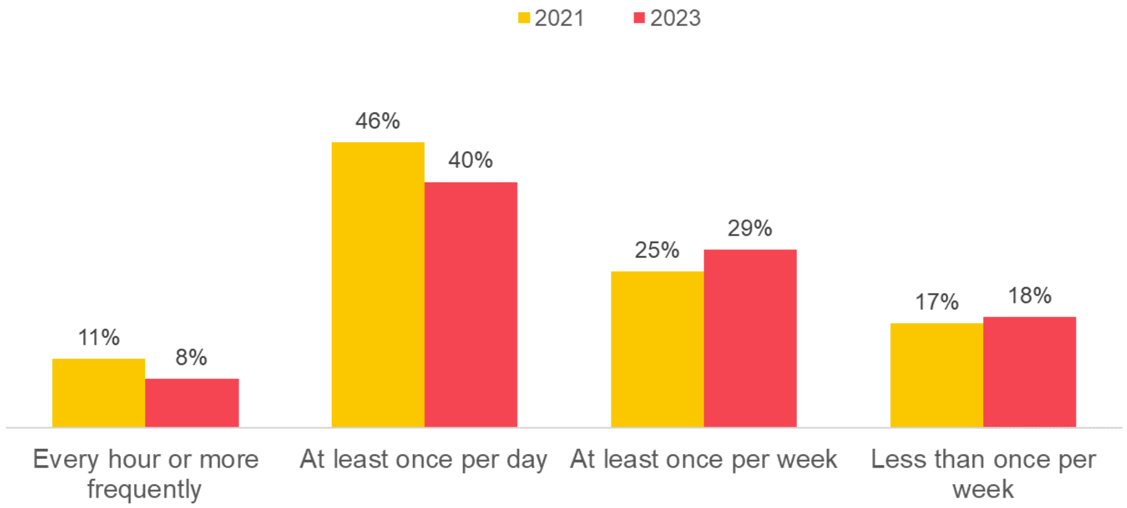
The proportion of consumers who check their main inbox at least daily has risen from 63% to 66% during the past two years. In contrast, 28% check emails in their main account every hour or more frequently, compared to 33% who did this in 2021.

How often do you check the main email inbox you use to receive personal messages?



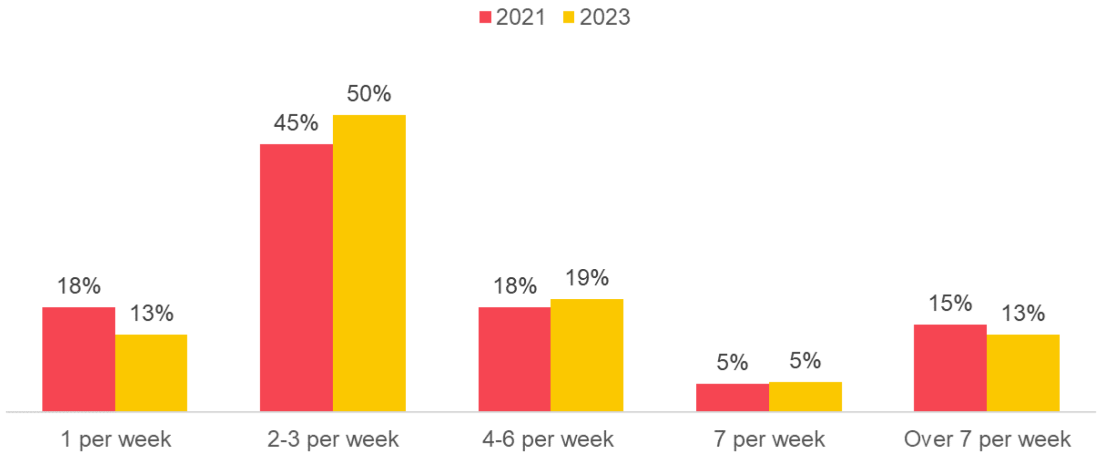
Recipients are equally in control of their junk folders, and perhaps have got wise to valuable or useful messages sometimes finding their way into spam. In its *Deliverability Benchmark Report 2023*, Validity reveals more than 15% of legitimate, permission-based email messages fail to reach recipients' inboxes. To that end, the share of consumers who check junk mail at least once a week has increased from 25% to 29%.

How often do you check the 'Junk' or 'Spam' folder of the main email inbox you use to receive personal messages?

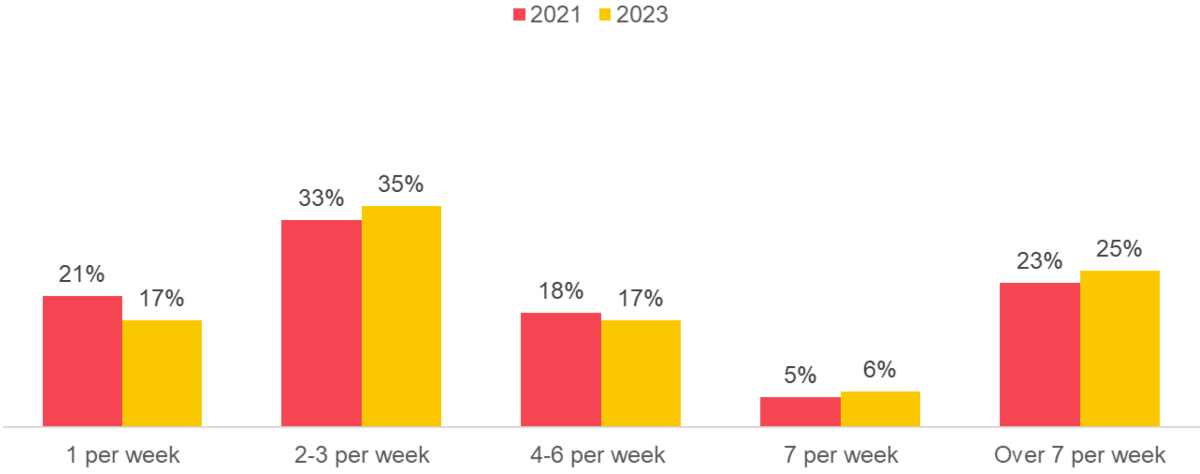


Meanwhile, half of consumers receive emails from brands, shops and sites they've opted into two or three times per week; up from 45% in 2021. Almost a fifth of consumers (19%) get four to six weekly. It's a similar picture relating to emails from brands that respondents don't explicitly recall being registered to receive emails from, with the share of consumers saying they get messages two or three times a week on the rise.

Number of emails received to personal inbox per week from single brand / shop / website **signed-up to**



Number of emails received to personal inbox per week from single brand / shop / website **not signed-up to**



Takeaways for brands and email marketers

1. Canny consumers see email as a discrete channel, logging in and out at their leisure. Reaching and engaging them via email may happen on their terms but it remains a big opportunity for brands. The trick is to assess when they check emails, and optimise send times accordingly.

2. Marketers may joke that junk folders are the “graveyard of email”, but it’s clear that curious consumers check them frequently. Perhaps this isn’t surprising when so many legitimate, permission-based marketing emails end up in spam - despite subscribers being keen to receive them. Even more reason for email design to help legitimate communications stand out from the crowd and be rescued from the flotsam of the spam filter. Senders should encourage their subscribers to use the "not spam" button when this happens. It sends a positive signal to mailbox providers because it tells them this was a false positive.

3. The frequency of marketing emails is increasing - and that presents a challenge for brands. Do consumers want so many emails or will this prompt unsubscribes? It’s also worth noting that some recipients may not realise they opted into emails when, for example, asking for an e-receipt. This may have skewed their perception of getting unsolicited emails.

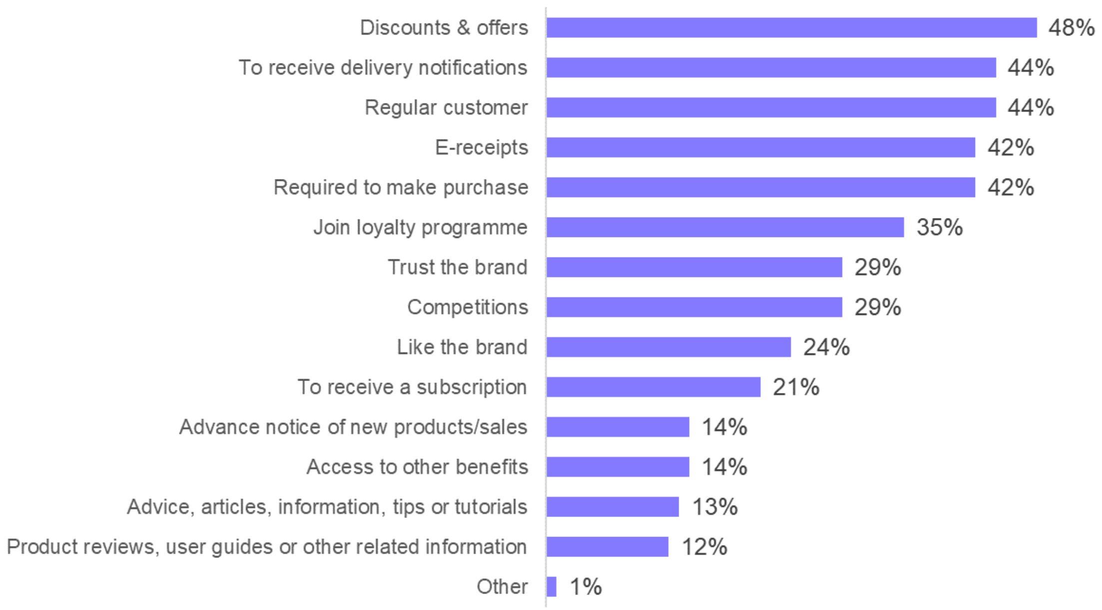
/ 7. Consumers have a limited list of "best-friend" brands

Consumers have a small basket of "best friend" brands, with sign-up volumes remaining flat since the previous study.

Both in 2021 and today, individuals claim to be registered with an average of around 10 brands, stores or sites to receive marketing emails. The mean is slightly higher for women (10.6) than men (8.9).

Meanwhile, receiving discounts and promotions is among the top five reasons people register to get emails (48%); marginally ahead of getting hygiene emails such as delivery notifications and e-receipts.

What are normally the main reasons you give your email address to a brand / shop / website?

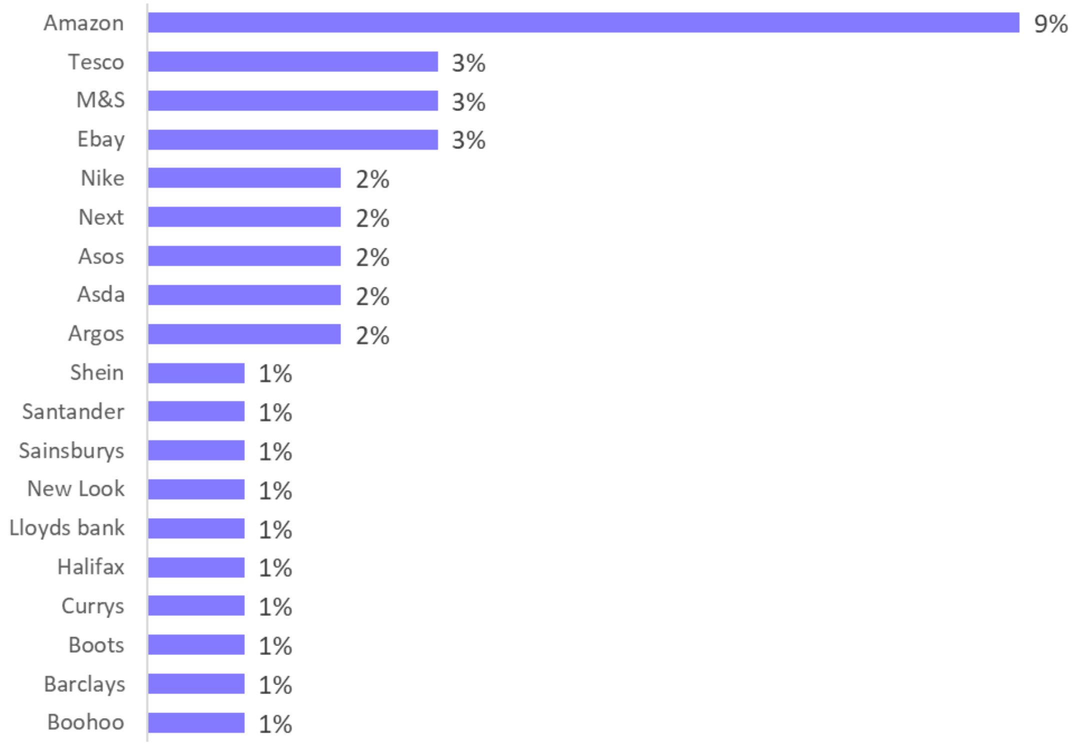


It's perhaps unsurprising that money-off promotions should be front of mind for consumers during the cost-of-living crisis. But the results also reveal insights that should give marketers food for thought.

For instance, sign-ups to join a loyalty program (35%) and respondents liking a brand (29%) have both fallen back as factors since our previous study, by 3% and 2% respectively.

This potentially suggests consumers do not feel as loyal to brands as they did in the past. Many are willing to shop around to try different options while their finances are tight.

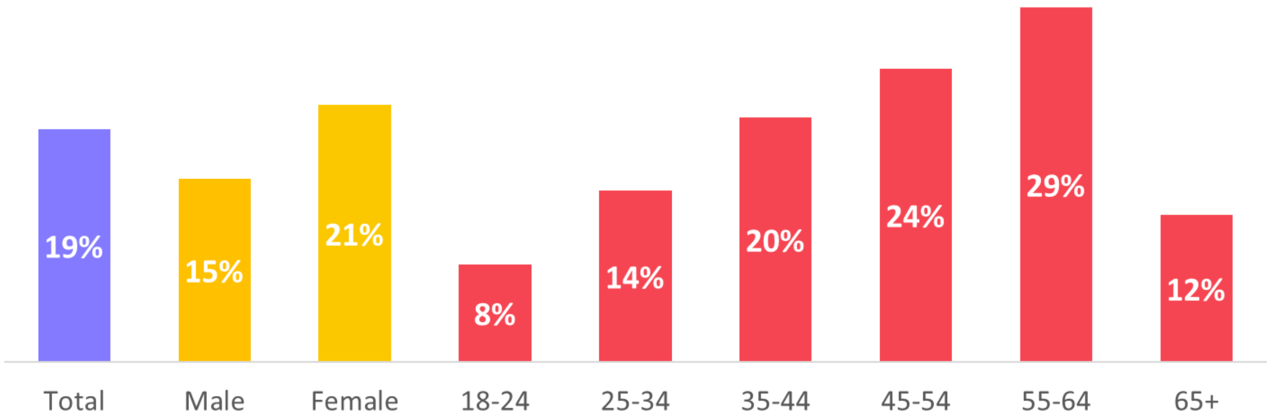
Thinking about the emails that you are signed up to receive, which of those brands/shops/sites do you think do email particularly well?



This list of best friend brands is unsurprisingly topped by Amazon, followed by Tesco M&S and eBay. Email can be a key marketing KPI driver for these organisations, with a +19 NPS score recorded as a result of receiving email on average (i.e. resulting in 19% points more brand promoters than detractors).

Women and consumer aged 45 and above are more likely to record NPS improvements following email receipt. This is a key consideration when attempting to shift the dial on this business-critical metric.

How likely are you to recommend this company/brand/website to a friend or colleague as a result of receiving an email? NPS Score (% Promoters minus % Detractors)



Takeaways for brands and email marketers

1. Consumers are discerning about which brands they let into their inbox. This chimes with the increased use of different emails addresses to keep personal and marketing communications separate. It also means brands must try even harder to get on the best friend list, which doesn't seem like it will get lengthier any time soon.

2. Promoting loyalty is an even bigger concern during inflationary times. With prices on the rise, consumers become more promiscuous about their brand choices. Email can be a vital tool in cementing these relationships and boosting loyalty. But on the flip side, the use of too many price promotions will create even more price-sensitive consumers. As with all marketing choices, a careful balancing act is required.

3. Email can also be a vital tool in boosting the Net Promoter Score for brands – a business-critical customer satisfaction metric that is linked to positive business outcomes for brands.

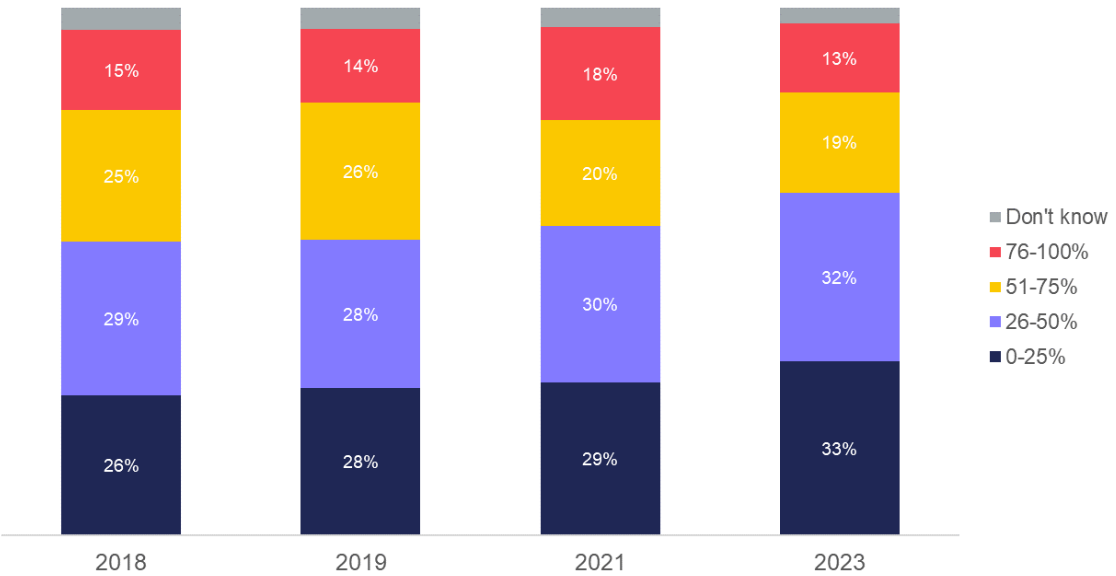
8. Email in the era of the attention economy

Consumers are becoming more selective about which emails they pay attention to. When they do, it gives marketers a massive opportunity to engage them.

Firstly, the proportion of consumers who open more than half the marketing messages they receive in their inbox has dropped to less than a third (32%), from 38% in 2021. While these numbers are in excess of average open rates observed by ESPs (a reflection of self-reported data vs passively observed analytics data), it is likely that respondents are only thinking about the emails they actually see or notice in their overcrowded inboxes.

Women (67%) are more likely than men (64%) to open fewer than half of the emails they receive from brands.

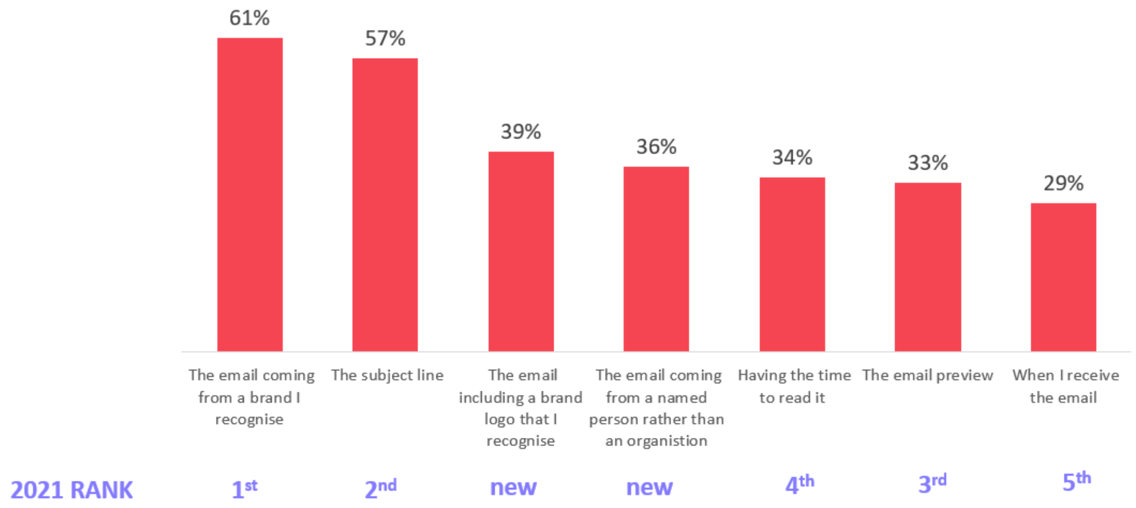
What percentage of emails from brands / shops / websites in your personal inbox(es) do you think you open and read?



However, this trend should also be viewed in the context of rising email volumes.

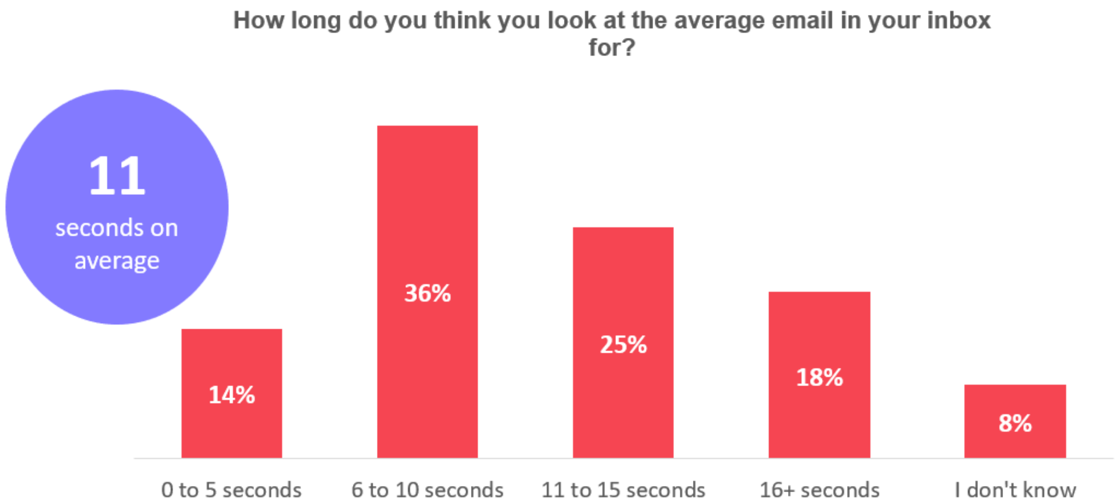
Furthermore, consumers say emblazoning an email with a well-positioned brand logo can add salience. This factor was ranked fourth by respondents in a list of features that encourage them to open a message; a list that also included recognising the brand that sent the email, and the nature of the subject line.

Importance of following factors to opening emails (% ranked 1st, 2nd and 3rd)



Secondly, the data shows that there can be big rewards for brands that persuade recipients to read their emails. A new question in this year's study has allowed us to calculate the average amount of time that consumers spend looking at an email in their inbox.

How long do you think you look at the average email in your inbox for?



Compared to attention metrics for other channels - for instance, attention to an average 15-second TV ad is just 7.5 seconds, and it's only 1.7 seconds for a digital ad impression - email (11 seconds) offers a significant amount of time brands can harness to deliver their key messages. The trick is to use these precious seconds as efficiently as possible.

Takeaways for brands and email marketers

1. Email dwell time reinforces the channel's position as the leader for creating and maintaining one-to-one customer relationships. A consumer opening an email is not the same as them watching TV when they might have one eye on another task, or passing an Out Of Home execution while on their commute. With more than a fifth (22%) of consumers also saying they like personalised emails, design and content must be on point for brands to make the most of this opportunity.

2. A majority of emails are not being opened and read. This highlights the common issue of consumers not recognising the real benefits of engaging with marketing messages - which in turn means they will fail to take further action. Context is also important - consumers need to receive emails when they are inclined to engage, and they may not always be in a buying cycle. Clearly, while the subject line remains important, thinking beyond this when designing email campaigns is key.

3. Best practice in email design is crucial: succinct copy, impactful images, and personalised and interactive - even gamified - content can boost dwell time. Viewability of email content can increase engagement: 68% of consumers scroll down past the initially visible part of an opened message; while 67% view emails beyond the first screen of their inbox. Once your email goes to the second page, the likelihood of being opened reduces.

4. BIMI - Brand Indicators for Message Identification - is one potential area of sharper focus for email marketers. It enables brand logos to pass authentication checks, an important part of the battle against brand impersonation and fraud. A more open conversation about BIMI's benefits, such as informing consumers about its mission and its practical uses, could build trust in both brands and email as a marketing channel.

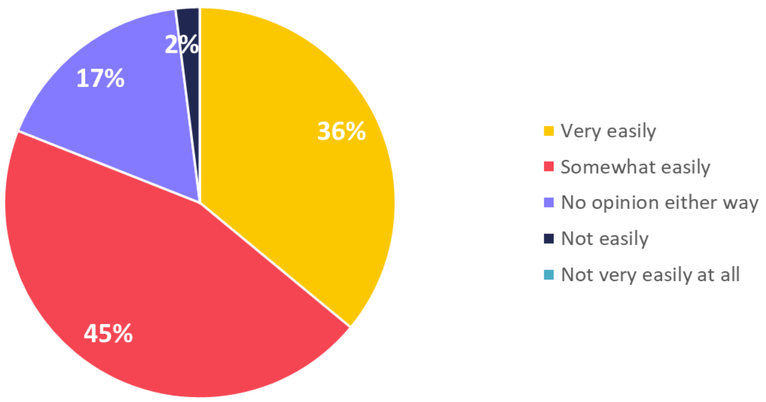
9: Accessibility is a critical concern for email marketers

A large majority of consumers find marketing emails easy to understand.

More than a third (36%) say colour, design, fonts and headings add to the accessibility of messages they receive, so that they understand them very easily. A further 45% state it is somewhat easy to understand emails.

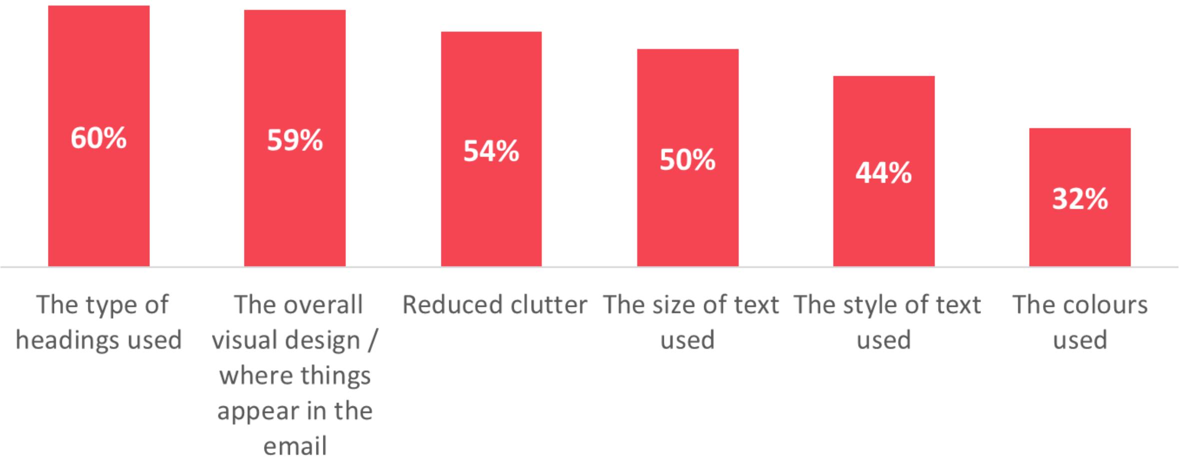
Women (38%) are more likely than men (34%) to say they find it very easy to understand emails.

How easily are you able to understand and interact with the information on the emails you receive to your personal inbox - colours, design, fonts, headings?



More specifically, the locations of where images, logos and texts are placed in an email is the key factor in message understanding (23%). But consumers also like uncluttered messages (22%) and the nature of headings that are included (22%).

Which of the following elements of how an email looks and feels do you think are most important in helping you understand it?



These insights can help brands engage a general audience with email marketing, not least with the growing preference for viewing emails on mobile devices. But, importantly, they also offer pointers on serving consumers who have accessibility issues such as those people with a visual impairment (see the DMA's Email Accessibility Guide).

Takeaways for brands and email marketers

1. A total of more than 70% of consumers are able to easily understand and engage with different elements of an email. Brands should focus on relevant heading tags, and make emails visually appealing while ensuring that their content is text-to-voice compatible - without compromising on brand guidelines, or overloading recipients with too much information.

2. Accessibility should be a high priority for email marketers. In July 2023, the Financial Conduct Authority rolls out its Consumer Duty regulations to set stricter standards around clarity of customer communications with a particular focus on vulnerable audiences. There are indications in our study about how marketers can positively respond to this issue and boost compliance, while also deepening email engagement.

3. 7% of consumers use a smart speaker to check their emails. While this may be convenient for notifications, it might not be so good for delving into the detail. However, senders do need to spend more time thinking about the audible experience their emails might produce, and unexpected surprises linked to this (for example, how would an emoji be "read"?)

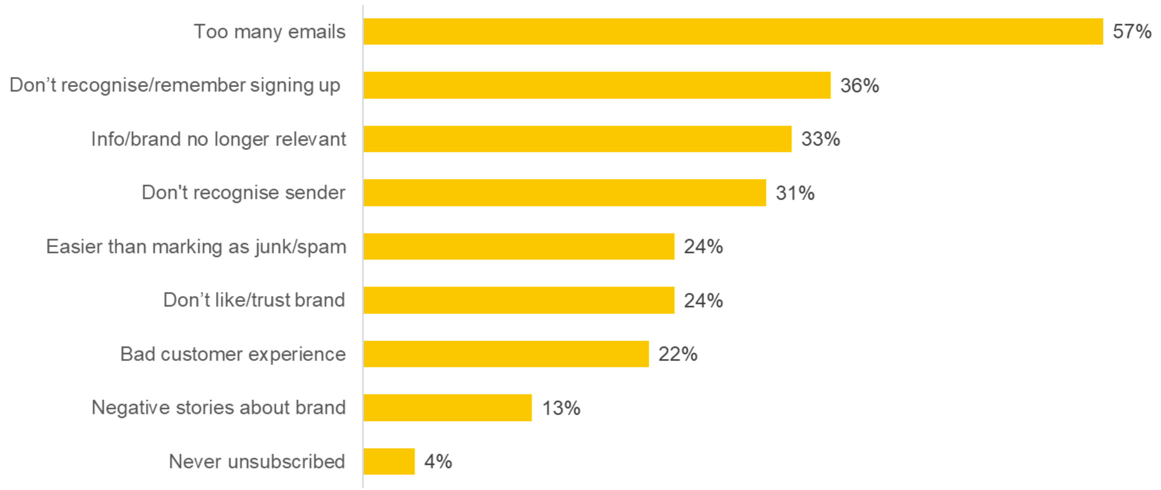
/ 10. Removing the friction from unwanted subscriptions

We’ve seen that consumers like many elements of email marketing, generally find messages easy to understand, and are prepared to spend more time absorbing marketing communications than they do in other channels.

They are also taking positive actions and enjoying slicker journeys when they click through to brand and retailer websites.

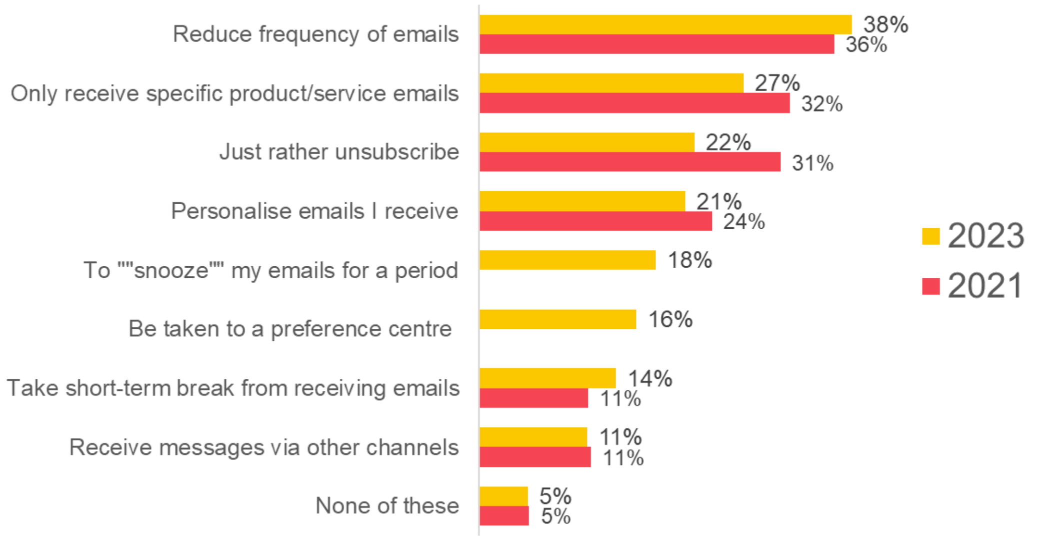
But it isn’t all plain sailing. A majority of consumers who unsubscribe from receiving an organisation’s emails feel they simply get too many (57%). Yet they have lots of other reasons to unsubscribe, too.

What makes you unsubscribe from a brand / shop / website’s emails?



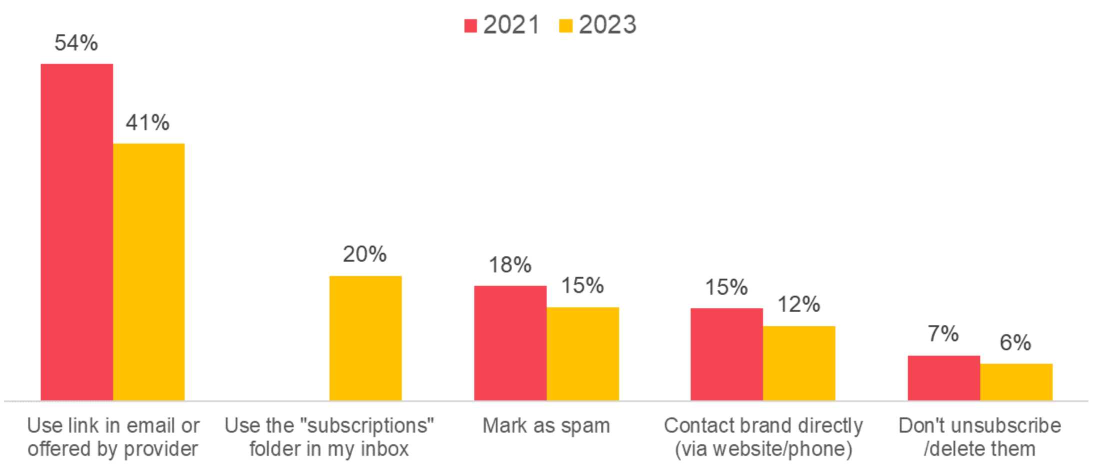
It’s not all bad news. Many consumers are willing to gives brands another chance if they introduce more controls. From reducing the frequency of emails, to sending marketing messages via other channels, there are measures that marketers can take to create more harmonious relationships.

Preferred options instead of unsubscribing



While unsubscribe links offered by providers are the most preferred route to unsubscribing, some providers such as Yahoo! allow subscription management via dedicated inbox folders – a preferred method for a fifth of consumers. Outlook's "sweep" functionality works in a similar way, and users can set up rules to automate this function.

What is the main method you use to stop receiving unwanted emails?



Takeaway for brands and email marketers

1. Unsubscribes are a reality check for email marketers: even engaged content consumers have a limit. The fact that consumers cite receiving too many emails as their main reasons for lopping a brand off their VIP list highlights the need for marketers to give individuals more control over the type and frequency of emails they wish to receive.

2. However, it should also be considered that an unsubscribe is not necessarily always a bad thing. The alternative is for the subscriber to register a spam complaint. For mailbox providers, unsubscribes are a neutral behaviour but complaints are viewed as negative and can have a significant impact on deliverability. While the findings encourage senders to offer choice as an alternative to unsubscribing, they should also make sure unsubscribing is the

preferred alternative to complaining - by ensuring opt-out links are visible (at the top of emails, not the bottom) and easy to use (single click functionality).

3. ESPs are beginning to add functionality that enables consumers to filter and unsubscribe messages. Ultimately, successful email marketing strategy is based on relevance, convenience and transparency; the right way to build trust and strengthen bonds with consumers.

Acknowledgements

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About the DMA Email Council

The DMA's Email Council is the home of email intelligence for the UK, leading the UK's marketing industry in innovative and cutting-edge email practices, breaking the mould and challenging the status quo.

The DMA Email Council exists to provide clarity and simplicity to marketers when it comes to email legislation and regulation, and to support marketers at all levels, from the classroom to the Boardroom, throughout their practical and aspirational professional development.

To help shape the future of email marketing, contribute to the discussions here or email email@dma.org.uk to find out more about the council and its work.

Get to know the Email Council here.

Find content produced by the Council here.

About the Data & Marketing Association

The Data & Marketing Association (DMA) comprises the DMA, Institute of Data & Marketing (IDM) and DMA Talent.

We seek to guide and inspire industry leaders; to advance careers; and to nurture the next generation of aspiring marketers.

We champion the way things should done, through a rich fusion of technology, diverse talent, creativity, insight – underpinned by our customer-focused principles.

We set the standards marketers must meet in order to thrive, representing more than 1,000 members drawn from the UK's data and marketing landscape.

By working responsibly, sustainably and creatively, together we will drive the data and marketing industry forward to meet the needs of people today and tomorrow.

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About Deployteq

Deployteq is an award-winning, no-code, marketing automation platform. Empowering marketers to create and deploy sophisticated, multichannel campaigns with ease. The company's core ambition is to help marketers build campaigns with the confidence that every message is delivered to their target audience.

Our best-of-breed marketing automation platform, offers SMS, WhatsApp, email, landing pages, mobile app, social and more, to help you reach your audience effectively. Deployteq seamlessly integrates into your ecosystem and is backed by first-class service, support, data and analytics. With our relational database, managing your data is has never been easier.

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For more information, visit Deployteq.com or connect with us via email at hello@deployteq.com

Methodology

The ‘Consumer Email Tracker 2023’ is an annual study undertaken by the DMA, in partnership with Validity and the DMA’s Email Council.

The research was conducted in March 2023 via an online survey of 2,004 respondents (nationally representative of UK adults). The data was collected and collated by Omnisis, then analysed by the DMA Insight department. The report was written and designed by the DMA Insight department and in-house design team.

The questionnaire was reviewed by the DMA, Deployteq and the Email Council’s Research Hub to ensure relevance to the current state of the email industry. Unless referenced, all data included in this report is taken from this survey.

If you have any questions about the methodology used in the report, you can contact the DMA’s research team via email: research@dma.org.uk

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