2018 Email Marketing Industry Census

In association with Adestra
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Contents

1. Executive Summary ................................................................. 5
2. Foreword by Adestra ................................................................. 9
   2.1. About Adestra ................................................................. 10
3. Methodology ............................................................................ 11
   3.1. Acknowledgements ............................................................ 11
   3.2. About Econsultancy ............................................................ 12
4. Findings .................................................................................. 13
   4.1. Approach to email ................................................................. 13
       4.1.1. Most important attributes of an email technology provider ..................................... 13
       4.1.2. Email marketing practices ................................................. 15
       4.1.3. Measuring success .......................................................... 21
   4.2. Email effectiveness and budgets ........................................... 24
       4.2.1. Email campaign performance .......................................... 24
       4.2.2. Ranking of channels for return on investment ................. 25
       4.2.3. Proportion of sales from email marketing ..................................... 29
       4.2.4. Proportion of marketing budget spent on email marketing .................................. 30
       4.2.5. Annual spend on email marketing ..................................... 33
   4.3. Place in the organisation ....................................................... 37
       4.3.1. Responsibility for email marketing ..................................... 37
       4.3.2. Time spent on email activities ......................................... 40
   4.4. Optimising for different devices ............................................. 43
       4.4.1. Strategy for optimising email for different devices ............. 43
       4.4.2. Tactics used for device optimisation ................................... 45
       4.4.3. Barriers to optimisation success ....................................... 47
   4.5. Personalisation ................................................................. 49
       4.5.1. Ability to provide personalised email campaigns ............... 49
       4.5.2. Personalisation challenges ............................................. 52
       4.5.3. What would email marketers like to improve? .................. 56
   4.6. Marketing automation ......................................................... 59
       4.6.1. Automation triggers ...................................................... 59
       4.6.2. Success with automation ................................................. 62
   4.7. Improving email marketing for the future ............................. 64
       4.7.1. Use of predictive or intelligent solutions ........................... 64
4.7.2. Innovating with email ..................................................67
4.7.3. Email marketing focus .............................................72
4.7.4. Data law changes ....................................................76
4.7.5. Use of animated or interactive modules ....................78

5. Appendix ...........................................................................80

5.1. Respondent profiles ......................................................80
5.2. Additional data .............................................................84
  5.2.1. Email effectiveness ..................................................84
  5.2.2. Email budgets .........................................................88
  5.2.3. Mobile .................................................................90
  5.2.4. Future of email .......................................................92
1. Executive Summary

This is the 12th annual Email Marketing Industry Census, published by Econsultancy in partnership with Adestra. More than 700 marketers took part in our online survey, carried out in March and April 2018. The report contains comprehensive analysis of survey data and a comparison with results from previous years, as well as insights from leading email marketing experts based in both Europe and North America.

The Email Census takes an in-depth look at email practices being adopted, and covers key topics such as marketing automation, segmentation, personalisation and optimisation for different devices. The future of email also has its own dedicated section, including questions on artificial intelligence and predictive analytics.

The research reveals the following key trends:

Email continues to be the most effective marketing channel, though fewer marketers report stellar performance

Once again, email marketing has emerged from the Email Census as the most highly rated marketing channel or discipline for return on investment, with nearly three-quarters (74%) of client-side marketers rating it as either ‘excellent’ or ‘good’ in this context. Just under a third (30%) of client-side marketers rate email as excellent for ROI, while a further 44% of respondents describe returns from email marketing as good.

However, exceptional email marketing performance is becoming harder as competition intensifies. Fewer respondents than last year rate the performance of their company’s email campaigns as ‘excellent’ or ‘good’ (48% in total, down from 52% last year and a peak of 56% in 2016), while more respondents classify email performance as ‘average’ or ‘poor’ (52%, up from 48% in 2017 and 44% two years ago).

While email continues to outperform in terms of the value it delivers to business, the gap between the proportion of marketing budget spent on email, and the percentage of sales generated by the channel, is closing slightly. The average proportion of budget accounted for by email has remained at 15%, the same percentage as in 2017 and 2016. However, the average proportion of revenues attributed to email is 19%, down three percentage points on last year.

Too many companies are relying on superficial metrics without looking at the bigger commercial picture

While more marketers than last year say they are using metrics such as conversion rate and earnings per email, many companies continue to rely solely on the most easily available reference points for performance, such as click-through rate and open rate, which don’t fully reflect the commercial impact of the email marketing channel.

The proportion of client-side marketers using click-through rate (CTR) as a metric to measure the performance of their email campaigns has remained at 91%, while 78% of responding companies now track open rate, down from 80% last year.

The failure to use more commercial metrics – and multi-touch attribution models – is having an impact on the ability to measure the true performance of email marketing as a channel. More than two-thirds (67%) of client-side respondents say they are tracking conversion rate, up from 62% in 2007. However, only a quarter (25%) of companies are tracking earnings per email, up from 23% last year.
Marketing automation is top of mind, but still a work in progress

Marketing automation is very much top of mind for marketers striving to make their email marketing more efficient and commercially effective, with 60% of respondents selecting this capability as one of the three most important attributes of an email technology solution, higher than for any other attribute. Along with segmentation, marketing automation is in joint second place – behind personalisation – as a key focus area for 2018.

- More than half (53%) of company respondents cite using automation to enable one-to-one communication as a key area of innovation where they intend to focus in 2018, up from 45% in 2017.
- There is steadily increasing use of marketing automation for a broad range of triggers or behaviours, and beyond the most obvious use cases such as in response to subscriptions or other sign-ups. Automated basket abandonment emails have seen the fastest rise, with 29% of respondents now using this tactic, up from 24% in 2017.
- From the agency perspective, there are encouraging signs of increased adoption of more sophisticated marketing automation use cases, including up-sell and cross-sell, up 12 and nine percentage points year-on-year, respectively.
- Despite the focus on marketing automation, a significant and larger proportion of in-house marketers than last year deem their automated email marketing programmes ‘not successful’ (37%, up four percentage points). The majority (55%, down four percentage points) report that their initiatives have been ‘quite successful’.

Personalisation at scale remains a tough nut to crack

- Personalisation is a top priority when it comes to improving email marketing capabilities over the year ahead. However, effective personalisation is elusive for many companies who are still struggling to put the basic building blocks in place to underpin success. Personalisation is overwhelmingly data-driven, but businesses remain challenged when it comes to integrating information from different databases.
- When asked what they ‘would like to do with their email marketing that they currently cannot do to their satisfaction’, 68% of company respondents cited better personalisation. This was two percentage points higher than in 2017, meaning that personalisation remains the most widely cited choice when it comes to respondents’ frustrated ambitions around email marketing.
- Only 13% of company respondents assert that they can now conduct email marketing campaigns at scale based on individual activities and preferences throughout the funnel, a two-percentage-point drop on 2017. Most email marketers (61%) still fall into either the bracket of having yet to begin work on personalisation or remaining in the early stages of doing so.
- Lack of resources and just finding the time to make it happen are both seen as major challenges by more than three in ten respondents, whether client- or agency-side. As was the case in 2017, most respondents cite integrating data as a key pain point.

The backdrop of GDPR looms large for email marketers

The ability to master data for areas such as segmentation, personalisation and automation increasingly needs to be seen in the context of what is legally permissible. There are encouraging signs over brands’ preparedness for GDPR. Among company respondents, 77% indicated they would be compliant with GDPR by the 25 May deadline. However, when agencies were asked about the impact of data law changes on their clients, a markedly lower proportion (66%) said they would be in a compliant position.

- Data/consent compliance (33%) is rated as the third most important attribute for an email technology solution.
However, the proportion of respondents citing list and data quality as an area of focus for 2018 has declined to 19%, from 24% in 2017.

Companies continue to wrestle with device optimisation

Despite email being increasingly consumed via smartphones, the proportion of companies optimising for different devices has declined slightly since last year. Even though mobile email usage is hardly a new trend, many marketers are still figuring out how best to adapt to it and turn it to their advantage.

Seven in ten company respondents now optimise their emails for mobile devices as part of normal practice. However, very few – only 2% – describe themselves as ‘very advanced’, strategically, in the context of device optimisation. This is a drop from previous years, reflecting how difficult it is to remain in tune with the behaviour of the modern mobile consumer.

Across a five-year timeframe, progress in this area has been slow. Far fewer respondents now deem their device optimisation strategy ‘non-existent’ (10%, down from 22% in 2014), but the tendency remains for many to see their efforts as merely ‘basic’ or ‘moderate’ (74%, versus 62% in 2014). Only 40% of respondents describe their attitude towards email campaigns as ‘mobile-first’.

Since 2017, more marketers have begun introducing shorter subject lines and tailored pre-header text for promotion, to better catch attention in mobile inboxes (59% and 49%, respectively).

Responsibility for email marketing moves to teams, with design and content sucking up more time

The trend towards email marketing being the responsibility of a team rather than an individual is continuing. In 2014, email marketing responsibility fell to a team, as part of wider marketing responsibilities for 38% of companies, but that percentage has been steadily increasing, reaching 46% this year.

Businesses with teams or individuals dedicated to the channel are nearly twice as likely to report excellent ROI from the channel than those whose teams or individuals take responsibility for it along with other marketing responsibilities (46% vs. 25%).

In terms of where companies are spending most time per campaign, the picture is similar to last year, with most time being spent on design and content. It is likely that marketers are spending this time on design and content to ensure they can deliver content that is more personalised. More advanced segmentation means that marketers need to create more types of content.

Encouragingly, the proportion of companies reporting that more than eight hours are consumed with strategy and planning has increased from 9% last year to 15% this year.

Email technology early adopters plan for future of email with artificial intelligence and predictive solutions

The potential for artificial intelligence (AI) and predictive analytics to improve the efficiency and precision of email marketing continues to capture the attention of brands and agencies, as they seek to realise the potential for scaled personalisation of customer communications.

However, only 17% of in-company respondents and 21% of agencies plan more innovation with AI in 2018, suggesting that this is still the preserve of early adopters of technology. This shows it may be some time yet before AI capabilities are widely assimilated by email marketers, accentuating the opportunities for early movers to differentiate themselves.

Among applications of AI, interest in optimisation of send times is evident. This is the most popular choice among company respondents for AI-based performance improvement, seeing support from nearly two-thirds (64%) of marketers.
- Possibilities for content optimisation – another widely-cited use case for AI – are also prominent. Interest in improving subject line copy and optimising calls to action is significantly higher than in 2017, capturing the attention of around half of those surveyed, in the cases of agency and brand respondents.

- Most company respondents have considered, trialled or implemented predictive solutions for adaptation of emails’ scheduling/frequency (69%), content (58%), or the product selection (53%) presented to recipients. Predictive adaptation of language/wording has caught the attention of nearly half (48%) of respondents.
2. **Foreword by Adestra**

We’re delighted to have been partnering with Econsultancy for 12 years now, producing what has become the definitive piece of industry research in the email marketing space. As the marketing technology landscape continues to innovate and expand in multiple directions, the email marketer’s everyday carry has responded accordingly with a rapidly expanding technology stack to ensure smart planning, smooth execution, extensive reporting and, of course, watertight compliance.

Consequently, one of our key areas of focus within this year’s census was the role of artificial intelligence and machine learning – a glance through most marketing blogs would certainly convey the impression that such tools are not only a necessity but moving ever closer into the mainstream. Our respondents suggested otherwise, however, with only small numbers of early adopters planning to innovate with AI in 2018, suggesting the options available in this area may need to develop before it becomes a viable option for many.

Marketing automation specifically, however, remains a priority, with a significant increase in implementation since 2017. Agencies and in-house teams alike are showing promising rates of adoption, as well as development of their existing strategies into a more sophisticated automation process. Whilst ultimately of considerable benefit to employee efficiency, setting up automated email programmes does require an element of planning and forethought; consequently, it is heartening to see an increase in the number of hours dedicated to strategy and planning over the past year.

Challenging areas have become apparent in various industries, too: achieving personalisation at scale remains a stumbling block for larger organisations, with device optimisation and the use of commercial metrics also flagged as areas for improvements across many companies.

It would be impossible to take the pulse of the email marketing community in 2018 without a focus on GDPR, with many of our survey respondents talking to us mere weeks ahead of its implementation. An interesting split between agency and client-side is noticeable in terms of perceived readiness, although both remained encouragingly positive and well-informed. Whilst we have been vocal proponents for years, maintaining clean data has never been more crucial, and we, like others in the space, will be keen to observe brand behaviours over the coming months.

Given such a complex and ever-changing climate surrounding this year’s census, we are extremely pleased to report that email has once again maintained its position as the most effective channel for marketers, with 74% rating its ROI yield as either ‘excellent’ or ‘good’. As the expectations placed on marketing teams increase and clients continue to demand transparency, personalisation and optimisation, 2018 is the year for marketers to step up their testing and strategy planning with a view to delivering all that is expected of them and more. Intelligent use of the right marketing technology, a sensitive awareness of client needs, and a laser-focus on the correct metrics will all play a role in helping brands stand out as truly First-Person Marketers.

*Henry Hyder-Smith*

CEO

*Adestra*
2.1. About Adestra

Adestra is a trusted provider of First-Person Marketing solutions for global and growing brands.

The company’s industry-leading email platform provides a powerful infrastructure for one-to-one, contextual messaging and marketing automation, helping marketers communicate more effectively with their customers and subscribers. Robust reporting features allow marketers to efficiently evaluate and optimise their campaign results. The flexible structure and open integration architecture allow businesses to connect disparate technology platforms to create a seamless customer journey.

Along with a best-of-breed platform that drives customer engagement and boosts ROI, Adestra was founded on the principle that marketing success takes more than technology, which is why customer service is at the heart of its business. Adestra was a winner of the 2014 and 2017 Customer Focus Award from the Customer Service Institute. It also won Bronze for Customer Service Department of the Year at the 2017 Stevie Awards for Customer Service, as well as Silver for Sales & Customer Service at the 2018 Stevie Awards. Adestra has also been awarded Customer Service Team of the Year 2017 at the Australian Service Excellence awards, as well as 2017 Supplier of the Year Award with one of its longest-standing clients, UBM.

Adestra continues to maintain one of the highest customer retention rates in the industry. It is trusted by top companies including Domino’s UK & Ireland, Greggs, and The Cheesecake Factory, among others.

Established in 2004, Adestra has offices throughout the UK, USA, Canada and Australia. For more information, please visit adestra.com.
3. Methodology

The 2018 Email Marketing Industry Census is the 12th annual edition of this report, published by Econsultancy in association with Adestra. Many of the questions have been repeated over this time period, enabling us to compare data and look at trends.

There were 704 respondents to our research request, which took the form of an online survey in March and April 2018. Respondents included both companies or in-house marketers (68%) and supply-side respondents, including agencies, consultants and vendors (32%).

Information about the survey, including the link, was emailed to Econsultancy’s user base and promoted on social media and other channels. The incentive for taking part was access to a complimentary copy of this report just before its publication. Detailed breakdowns of the respondent profiles are included in the Appendix.

If you have any questions about the research, please email Econsultancy’s Head of Commercial Research Services, Monica Savut (monica.savut@econsultancy.com).

3.1. Acknowledgements

Econsultancy would like to thank the following people for their insights included in this report:

- Rachel Aldighieri, Managing Director, DMA
- David Baker, Partner, RedPill Email
- Andrew Campbell, Martech Director, First 10
- Stephanie (Sam) Miller, Lead Advisor for Digital Transformation, Econsultancy USA
- Kath Pay, Founder and Senior Consultant, Holistic Email Marketing
- Jordie van Rijn, Founder of emailvendorselection.com and eMailMonday
- Natalie Rockall, Founder, Eleven11 Digital
- Philip Storey, Principal Email Marketing Consultant, Enchant Agency
- Rikke Thomsen, Head of Email Marketing, Sleeknote
- Jenna Tiffany, Founder and Strategy Director, Let’s Talk Strategy
- Tim Watson, Email Consultant, Zettasphere
3.2. About Econsultancy

Econsultancy's mission is to help its customers achieve excellence in digital business, marketing and ecommerce through research, training and events.


Econsultancy is used by over 600,000 professionals every month. Subscribers get access to research, market data, best practice guides, case studies and elearning – all focused on helping individuals and enterprises get better at digital.

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4. Findings

4.1. Approach to email

4.1.1. Most important attributes of an email technology provider

This year’s Email Census findings begin with our survey respondents’ view of the most important attributes of an email technology provider. Marketing automation capability is very much top of mind for marketers, with 60% of respondents selecting it as one of the three most important attributes of an email technology solution.

Put simply, marketing automation allows marketers to maintain better relationships with customers. As more complex challenges place greater demands on marketers, the ability to automate email communications is becoming essential. The gap between email marketing and marketing automation as separate solutions has continued to close as marketers strive for automated email marketing capabilities, and email vendors see an opportunity to add value for clients, while making their solutions more strategically important. Such is the importance of automation as a theme that it again has its own dedicated Email Census chapter (Section 4.6).

While 60% of client-side marketers cited user-friendly interface as an important attribute last year, this percentage has fallen by nearly a quarter to 46% for 2018, suggesting that this feature is now more widely taken for granted as email service providers (ESP) have been forced to raise their game. A poor user interface can cause untold frustration within a business, while also limiting its usage to those who are the most technically proficient.

Company respondents

Figure 1: What are the most important attributes of an email technology provider?

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketing automation capability</td>
<td>60%</td>
</tr>
<tr>
<td>User-friendly interface</td>
<td>46%</td>
</tr>
<tr>
<td>Data / consent compliance</td>
<td>33%</td>
</tr>
<tr>
<td>Ability to integrate with other best-of-breed marketing technology</td>
<td>30%</td>
</tr>
<tr>
<td>Cost</td>
<td>30%</td>
</tr>
<tr>
<td>Cross-channel marketing capabilities</td>
<td>27%</td>
</tr>
<tr>
<td>Design tools/support</td>
<td>26%</td>
</tr>
<tr>
<td>Real-time technical support</td>
<td>13%</td>
</tr>
<tr>
<td>Account management</td>
<td>10%</td>
</tr>
<tr>
<td>Part of a larger marketing software suite or cloud</td>
<td>8%</td>
</tr>
<tr>
<td>Tech roadmap</td>
<td>4%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
</tr>
</tbody>
</table>

Notes: Respondents could select up to three options. We have not shown the year-on-year comparison because this year’s list of options was expanded.
Voice of the expert: marketing automation capabilities

“The vast majority of email marketers are now demanding powerful automation tools. And there’s no wonder as to why – email marketing automation is efficient and incredibly lucrative. But there’s a major gap here, as most traditional email marketing platforms have been slow to develop capabilities in automation. This has created a temporary new marketplace where new tech companies are appearing and bridging this automation capability gap. However, we are now starting to see email service providers catch up, so that all email deployment is becoming easier to house within one technology platform, rather that working with multiple vendors.”

Philip Storey, Principal Email Marketing Consultant, Enchant Agency

Data/consent compliance, a new option for this year, is rated as the third most important attribute, with a third (33%) of respondents selecting it. With the General Data Protection Regulation (GDPR) now in effect, it will be fascinating to see its impact on email marketing over the next few months, and how this translates into next year’s Email Census survey findings.

The proportion of respondents who rate ability to integrate with other best-of-breed marketing technology as a key ESP attribute has declined since 2016. While 49% of marketers selected this option in 2016, and 37% did in 2017, just 30% did so this year. Integration between different technologies is crucial for effective joined-up marketing activities, so this lower percentage might be because this is no longer a differentiator, but rather – as with a user-friendly interface – something of a hygiene factor.

The proportion of respondents selecting real-time technical support has fallen by almost half, from 24% in 2017 to 13% in 2018. The most obvious inference here is that these marketing technologies have become more intuitive, so there is less of a need for real-time support from the provider.

Voice of the expert: the importance of data and consent in the context of GDPR

“It’s interesting to see how data and consent compliance is now the third most important attribute for email providers. With the new General Data Protection Regulation in the European Union, it’s no surprise that this is now of concern to email marketers. There’s still a lot of confusion as to how these new regulations will affect email marketing in practice, and just because it’s an important attribute, I doubt many email marketers actually know what these regulations mean, and how to be compliant.

“That’s why it’s of utmost importance for email marketers to become familiar with the regulations and how they as individual businesses comply — not just in their email marketing, but with all their data collection services (both external and internal).”

Rikke Thomsen, Head of Email Marketing, Sleeknote
4.1.2. Email marketing practices

*Figure 2 is a useful state-of-the-industry health check on the extent to which different practices are being employed. When it comes to the email marketing practices adopted by in-company marketers, the picture is similar to last year. The four most widely carried out practices – *basic segmentation* (which 82% of client-side respondents say they are currently doing), *optimising email for mobile devices* (70%), *regular list cleansing* (55%) and *encouraging sharing of content on social networks* (52%) – are the same as they were in 2017.*

Company respondents

Figure 2: Which of the following practices are part of your email marketing efforts?

<table>
<thead>
<tr>
<th>Practice</th>
<th>We do this</th>
<th>Planning this</th>
<th>We don't do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic segmentation</td>
<td>82%</td>
<td>11%</td>
<td>7%</td>
</tr>
<tr>
<td>Optimising email for mobile devices</td>
<td>70%</td>
<td>18%</td>
<td>12%</td>
</tr>
<tr>
<td>Regular list cleansing</td>
<td>55%</td>
<td>27%</td>
<td>18%</td>
</tr>
<tr>
<td>Encouraging sharing of content on social networks</td>
<td>52%</td>
<td>15%</td>
<td>33%</td>
</tr>
<tr>
<td>Re-marketing</td>
<td>44%</td>
<td>24%</td>
<td>32%</td>
</tr>
<tr>
<td>Use of video content</td>
<td>41%</td>
<td>28%</td>
<td>31%</td>
</tr>
<tr>
<td>Use of transactional emails for marketing</td>
<td>39%</td>
<td>19%</td>
<td>42%</td>
</tr>
<tr>
<td>Content personalisation (beyond just name)</td>
<td>35%</td>
<td>37%</td>
<td>28%</td>
</tr>
<tr>
<td>Lead nurturing</td>
<td>35%</td>
<td>31%</td>
<td>34%</td>
</tr>
<tr>
<td>Location-based email content</td>
<td>33%</td>
<td>18%</td>
<td>49%</td>
</tr>
<tr>
<td>Advanced segmentation</td>
<td>31%</td>
<td>43%</td>
<td>26%</td>
</tr>
<tr>
<td>Lifecycle programmes</td>
<td>29%</td>
<td>33%</td>
<td>38%</td>
</tr>
<tr>
<td>Promoting customer ratings and reviews</td>
<td>27%</td>
<td>23%</td>
<td>50%</td>
</tr>
<tr>
<td>Multichannel triggers (e.g. sales call)</td>
<td>26%</td>
<td>25%</td>
<td>49%</td>
</tr>
<tr>
<td>Behavioural targeting (based on web activity)</td>
<td>24%</td>
<td>39%</td>
<td>37%</td>
</tr>
<tr>
<td>Dynamic email content (live listings / availability)</td>
<td>19%</td>
<td>30%</td>
<td>51%</td>
</tr>
<tr>
<td>Lead scoring</td>
<td>17%</td>
<td>25%</td>
<td>58%</td>
</tr>
<tr>
<td>Dynamic social feeds</td>
<td>11%</td>
<td>18%</td>
<td>71%</td>
</tr>
</tbody>
</table>

*Respondents: 324*
This similarity with last year’s findings suggests these practices are continuing to deliver ROI. Despite email being increasingly consumed on mobile devices, the proportion of companies optimising accordingly has declined slightly since last year (Figure 3). This may be because more companies are using mobile-friendly templates provided by their ESPs, which means that some companies – misguidedly – no longer see mobile-friendly tactics as an additional requirement. Like marketing automation, this topic also has its own dedicated section (Section 4.4). There has also been a decrease in the percentage of marketers who are doing regular list cleansing since last year, though, with the introduction of GDPR, this figure is likely to rise in 2019.

It is also worth noting that marketing automation is not a panacea for marketers in terms of magically making various essential email-related tasks and processes disappear. While automation can certainly make email marketing more efficient, there is also work needed to set up the processes and data integrations required to make it work seamlessly. Companies also need to factor in the time and resource for related copywriting and creative. While some companies work on more sophisticated types of email personalisation and automation, many are still focusing on a range of more straightforward tasks such as basic segmentation.

Company respondents
Figure 3: Proportion of respondents saying these practices are part of their email marketing efforts
Figure 3 illustrates how prevalent a range of different email marketing practices are among client-side marketers. While basic segmentation is once again at the top of the table, with 82% of marketers doing it, there has been a surprising decrease in the proportion of marketers using other practices, most notably the use of transactional emails for marketing, multichannel triggers (e.g. sales call) and dynamic email content (live listings/availability).

A glass-half-full perspective on the decreases here (six, ten and seven percentage points respectively) is that companies are more focused on mastering the basics of email marketing. That said, opportunities are being missed by those who are not at least experimenting with these tactics as they are likely to yield significant benefits when deployed appropriately.

Bucking the trend of decreases in usage of these tactics, encouraging sharing of content on social networks has risen modestly from 49% to 52%, as has content personalisation beyond just name (33% to 35%) and lead nurturing (32% to 35%).

Segmentation

Segmentation essentially allows marketers to deliver more tailored messaging to customers, depending on their circumstances or behaviour. The figures suggest that segmentation is now a standard practice for marketers, with 82% now doing it, and a further 11% planning to do so in the future (Figure 2).

Basic segmentation typically covers communications that are based on a recipient’s most basic characteristics, such as gender or geography, or whether they are an existing customer. Advanced segmentation takes things a step further, by incorporating, for example, browsing behaviour, click-throughs or groupings based on statistical modelling.

Of all the email marketing practices shown in Figure 2, marketers are most likely to say they are planning to adopt advanced segmentation (43%) in the future. This is followed by behavioural targeting (based on web activity), a related tactic which 39% of client-side marketers say they are planning to undertake.

Voice of the expert: use of email marketing practices

“The popularity of different email practices appears to be more related to the amount of effort needed to deliver than the most effective best practices to follow. The data shows that sharing on social networks from email ‘share’ links is relatively ineffective whereas less popular practices, such as transactional emails, lifecycle programmes, customer ratings/reviews are all much more beneficial. Sometimes more time and focus on fewer, but highly effective tactics, is the right strategy.”

Tim Watson, Email Consultant, Zettasphere

“I find it discouraging to see that 42% of respondents don’t use or plan to use transactional emails for marketing purposes. Transactional emails have an average open rate of 48% compared to 18.3% for non-transactional emails. Besides having a high open rate, transactional emails also have an impressive average click-through rate of 8.8%.

“This is a massive opportunity for marketers to drive profit and engagement from consumers. There are many ways to optimise transactional emails, but for many marketers, the first step is simply to remove the transactional email from your developers’ table, and hand over the responsibility to an actual marketer with copywriting skills.”

Rikke Thomsen, Head of Email Marketing, Sleeknote
While there is no objectively agreed line for where basic segmentation becomes advanced segmentation, the distinction is useful for assessing email marketing maturity, and its impact on marketing performance.

The following tables show how effective segmentation is in terms of delivering ROI. Those who are doing basic segmentation are more likely to rate the ROI they get from email marketing as excellent (31%) than those who are planning to do so (21%) or do not do so (25%).

As was the case last year, advanced segmentation correlates even more strongly with ROI from email. Businesses using this tactic are more than twice as likely to rate their ROI from email marketing as excellent than those who do not (37% vs. 17%). None of the survey respondents who do advanced segmentation rate their ROI from email marketing as poor.

Company respondents
Table 1: Cross-tabulation of responses for ‘Which practices are part of your email marketing efforts?’ (basic segmentation) and ‘How do you rate the following channels (email marketing) in terms of return on investment?’

<table>
<thead>
<tr>
<th></th>
<th>Excellent</th>
<th>Good</th>
<th>Average</th>
<th>Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>We do this</td>
<td>31%</td>
<td>46%</td>
<td>20%</td>
<td>3%</td>
</tr>
<tr>
<td>Planning this</td>
<td>21%</td>
<td>33%</td>
<td>37%</td>
<td>9%</td>
</tr>
<tr>
<td>We don’t do this</td>
<td>25%</td>
<td>35%</td>
<td>25%</td>
<td>15%</td>
</tr>
</tbody>
</table>

Company respondents
Table 2: Cross-tabulation of responses for ‘Which practices are part of your email marketing efforts?’ (advanced segmentation) and ‘How do you rate the following channels (email marketing) in terms of return on investment?’

<table>
<thead>
<tr>
<th></th>
<th>Excellent</th>
<th>Good</th>
<th>Average</th>
<th>Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>We do this</td>
<td>37%</td>
<td>52%</td>
<td>11%</td>
<td>0%</td>
</tr>
<tr>
<td>Planning this</td>
<td>33%</td>
<td>38%</td>
<td>22%</td>
<td>7%</td>
</tr>
<tr>
<td>We don’t do this</td>
<td>17%</td>
<td>45%</td>
<td>31%</td>
<td>7%</td>
</tr>
</tbody>
</table>
The top four email marketing practices seen by agencies among their clients (Figure 4) are the same as those reported by in-company respondents. While 38% say their clients are doing advanced segmentation, almost the same proportion – 37% – plan on doing so. As with the client-side survey data, this is the tactic seen by agencies as most likely to be on the radar.

Agency respondents

Figure 4: Which of the following practices are part of your clients’ email marketing efforts?

<table>
<thead>
<tr>
<th>Practice</th>
<th>We do this</th>
<th>Planning this</th>
<th>We don’t do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic segmentation</td>
<td>83%</td>
<td>11%</td>
<td>6%</td>
</tr>
<tr>
<td>Optimising email for mobile devices</td>
<td>71%</td>
<td>18%</td>
<td>11%</td>
</tr>
<tr>
<td>Regular list cleansing</td>
<td>63%</td>
<td>11%</td>
<td>26%</td>
</tr>
<tr>
<td>Encouraging sharing of content on social networks</td>
<td>53%</td>
<td>16%</td>
<td>31%</td>
</tr>
<tr>
<td>Re-marketing</td>
<td>53%</td>
<td>21%</td>
<td>26%</td>
</tr>
<tr>
<td>Lead nurturing</td>
<td>53%</td>
<td>25%</td>
<td>22%</td>
</tr>
<tr>
<td>Multichannel triggers (e.g. sales call)</td>
<td>45%</td>
<td>19%</td>
<td>36%</td>
</tr>
<tr>
<td>Content personalisation (beyond just name)</td>
<td>45%</td>
<td>33%</td>
<td>22%</td>
</tr>
<tr>
<td>Use of transactional emails for marketing</td>
<td>43%</td>
<td>18%</td>
<td>39%</td>
</tr>
<tr>
<td>Behavioural targeting (based on web activity)</td>
<td>41%</td>
<td>26%</td>
<td>33%</td>
</tr>
<tr>
<td>Use of video content</td>
<td>39%</td>
<td>31%</td>
<td>30%</td>
</tr>
<tr>
<td>Advanced segmentation</td>
<td>38%</td>
<td>37%</td>
<td>25%</td>
</tr>
<tr>
<td>Lifecycle programmes</td>
<td>38%</td>
<td>28%</td>
<td>34%</td>
</tr>
<tr>
<td>Lead scoring</td>
<td>37%</td>
<td>28%</td>
<td>35%</td>
</tr>
<tr>
<td>Promoting customer ratings and reviews</td>
<td>37%</td>
<td>22%</td>
<td>41%</td>
</tr>
<tr>
<td>Location-based email content</td>
<td>31%</td>
<td>23%</td>
<td>46%</td>
</tr>
<tr>
<td>Dynamic email content (live listings / availability)</td>
<td>25%</td>
<td>30%</td>
<td>45%</td>
</tr>
<tr>
<td>Dynamic social feeds</td>
<td>17%</td>
<td>20%</td>
<td>63%</td>
</tr>
</tbody>
</table>

Respondents: 129

While the top four email marketing practices are the same for both companies and agencies, agencies are more likely to report an uplift in the use of these practices (Figure 5). This is encouraging as agencies typically have a broader view on the maturity of email marketing activities across different businesses and sectors.

While the proportion of agencies saying their clients do basic segmentation has risen five percentage points from last year (from 78% to 83%), the percentage for optimising email for mobile devices has fallen (from 75% in 2017 to 71% in 2018), as was the case with the client-side sample of respondents.
Still looking through the lens of supply-side respondents, email marketing practices that have seen an uplift since last year also include content personalisation beyond just name (37% to 45%), multichannel triggers (33% to 45%) and lifecycle programmes (31% to 38%).

In fact, according to agency respondents, of the 18 email marketing practices included in the survey, only four of them have seen a year-on-year decrease, namely optimising email for mobile devices, use of transactional emails for marketing, location-based email content and dynamic email content (live listings/availability). In each case the decrease is small.

Agency respondents
Figure 5: Proportion of agency respondents saying these practices are part of their clients’ email marketing efforts
4.1.3. Measuring success

*Figure 6* shows the range of metrics marketers use to measure the success of their email marketing activities. The proportion of client-side marketers using *click-through rate* (CTR) as a metric to measure the performance of their email campaigns has remained at 91%, so there are still some businesses that are not using this most basic of metrics to measure their success. The continued popularity of CTR and *open rate* as the metrics of choice must be in no small part due to how simple they are to measure, and the fact that they can be used for every email campaign. CTR can also be used to compare the performance of A/B tests.

Other metrics, such as *conversion rate* – the percentage of email recipients who complete a desired action after clicking on a link – are not as straightforward to measure, relying on email being properly integrated into the company’s digital analytics. However, it is metrics like these that offer marketers a clearer picture of email marketing ROI. Keeping an eye on conversion rate can also help marketers decide whether it is a good idea to dedicate more resources to a particular type of campaign.

It is therefore great to see marketers now paying closer attention to conversion rate, as well as *earnings per email* – both metrics that are directly related to commercial uplift. Each of these metrics saw a modest increase in the proportion of client-side marketers using them (62% to 67% and 23% to 25%, respectively). The proportion of those who measure conversion rate is now more in line with the percentage reported by agencies (69%), as shown in *Figure 7*.

**Company respondents**

*Figure 6: What metrics do you use to measure the success of your email marketing activities?*
Voice of the expert: measuring campaign success

“I’m surprised to see that click-through rates are of higher priority than conversion rates and email ROI. If your call to action in your email is to get prospects to purchase something, ROI should always be a higher priority than click-throughs.

“Also, email ROI should always be measured against the cost of sending this email. This includes wages for the people involved in creating the email, setting up automations, payment for the tools you use, etc. It makes it harder and more complicated to measure the success of your email marketing efforts, but you’ll also get a much more accurate result compared to if you’re only looking at open and click-through rates.”

Rikke Thomsen, Head of Email Marketing, Sleeknote

“It is refreshing to see that click-through rate has trumped open rate as the number one metric used to measure the success of email marketing. It is also inspiring for the email industry to see that the use of conversion rate as a metric has grown slightly this year too.

“The main areas of opportunities here are to be able to measure the earnings per email to arm an email marketer when approaching the problematic conversations for an increased budget for email activity. Being able to demonstrate the value that we all know email provides as a revenue-generating digital marketing channel will ensure that email gets the budget it deserves to optimise the channel truly.”

Jenna Tiffany, Founder and Strategy Director, Let’s Talk Strategy

“Despite this agreement of the importance of email and its ROI, when marketers were asked about measuring the success of their campaigns, just one in five are able to equate earnings and, therefore, an accurate value of the returns email can generate. More popular measurements continue to be click-through, open and conversion rates.”

Rachel Aldighieri, Managing Director, DMA

“It is encouraging to see even slight growth in the use of conversion rate. Email marketers can no longer stay in a silo – we must prove the value of our effort to business KPIs and overall customer experience and lifetime value. Those are the metrics that matter. Analytics-driven attribution models are increasingly being built into ESPs, so please use them!”

Stephanie (Sam) Miller, Lead Advisor for Digital Transformation, Econsultancy USA
Agencies report greater attention being paid to the bounce rate – the percentage of email addresses that didn’t receive a message because it was returned by a recipient mail server – than companies. While the proportion of agency clients who use bounce rates to measure the success of their campaigns rose from 43% to 48% this year, for client-side marketers, the proportion fell slightly, from 41% to 40%. Agencies report lower usage of CTR and open rate than client-side respondents, however, with a slightly smaller proportion of agencies saying their clients typically track these metrics.

Agency respondents

Figure 7: What metrics do your clients typically use to measure the success of their email marketing activities?
4.2. Email effectiveness and budgets

4.2.1. Email campaign performance

An important Email Census benchmark over the past few years has been the perceived performance of campaigns. Fewer respondents than last year report ‘excellent’ or ‘good’ returns from this channel (48% in total, down from 52% last year and a peak of 56% in 2016), while, correspondingly, more respondents classify email performance as ‘average’ or ‘poor’ (52%, up from 48% in 2017 and 44% two years ago).

This suggests that companies are raising their game and making it more difficult to perform strongly. Marketers must try harder when it comes to their email campaigns, and make sure that they are tracking performance effectively. If left unchecked in an increasingly competitive environment, average performance today will become poor performance tomorrow.

It is worth noting here, as we have done in previous editions of the Email Census, that self-reported mediocre performance in this area may be due to a lack of confidence about what metrics are the best indicators of campaign performance, and the challenges presented by data and attribution. There may be a case of marketers simply not knowing ‘what good looks like’, and a sense of continually striving towards good performance without reaching this goal.

Company respondents

Figure 8: How do you rate the performance of your company’s email campaigns?

2015: 600 | 2014: 693 | 2013: 834
4.2.2. Ranking of channels for return on investment

Once again, email marketing has emerged from the Email Census as the most highly rated marketing channel or discipline for return on investment, with nearly three-quarters (74%) of client-side marketers rating it as either ‘excellent’ or ‘good’ in this context.

Just under a third (30%) of client-side marketers rate email as excellent for ROI, while a further 44% of respondents describe returns from email marketing as good.

SEO (organic search), which over the years has been the closest competitor to email as the best channel for ROI, is once again the channel second most likely to be rated as excellent for ROI, with 25% describing it as such. A further 45% of marketers surveyed rate returns from organic search as good.

Paid search and content marketing are the next two most highly rated channels or disciplines, with 62% and 61% of respondents, respectively, rating them as excellent or good. From here, performance drops off quite considerably, with fewer than half of respondents rating ROI from offline direct marketing (38%), mobile marketing (45%), social media (39%), online display advertising (36%) and affiliate marketing (40%) as at least ‘good’.

Company respondents
Figure 9: How do you rate the following channels or disciplines in terms of return on investment?

Respondents: 402
As can be seen in Figure 10, nearly all the channels and disciplines have seen a decline in the proportion of marketers rating them as excellent or good – all except email marketing, paid search (PPC) and online display advertising.

The performance of email marketing in this respect seemingly contradicts what was seen in Figure 8, where we noted a decline in the proportion of marketers reporting excellent email performance. In fact, what this suggests is that, despite increased difficulty getting top performance from email campaigns, marketers still rate the channel as strongly as ever when its performance is judged relative to other channels in the marketing mix.

The decline in respondents rating social media as excellent or good may be due to the platforms becoming increasingly pay-to-play. Similarly, SEO is becoming increasingly challenging to manage effectively without significant investment in content, with much less low-hanging fruit available.

Figure 11 provides further evidence that SEO may be starting to fall from favour as a sure-fire way of getting a return on investment. While a decade ago nearly three-quarters (74%) of client-side marketers rated it as good or excellent, this percentage has fallen four percentage points to 70% this year.

The performance of SEO can be contrasted with email over this ten-year time period. The percentage of respondents rating email marketing as excellent or good for ROI has increased from 66% in 2008 to 74% in 2018. Email is perceived to be significantly more effective than it was a decade ago, bearing testament to the longevity of this channel.
Other channels or disciplines that have continued to demonstrate their effectiveness in terms of ROI, and which are adopted by a greater proportion of marketers today than they were a decade ago, are **paid search** (now rated as excellent or good by 62% of respondents, up from 57% in 2008), **online display advertising** (up from 25% to 36%), and **mobile marketing**, which has been the biggest climber over the last ten years (from 18% to 45%).

The significant rise in the percentage of marketers rating mobile marketing as excellent or good for ROI can be attributed to the explosion in the number of smartphones over that time, as well as the fact that one in four advertising pounds is now spent on mobile.¹ The rapid growth of mobile has also had a significant impact on email marketing, as we shall explore later in the report.

At the other end of the spectrum, the proportion of marketers rating **affiliate marketing** as excellent or good has fallen 16 percentage points since 2008 to 40% this year. While it can still be an effective channel for retailers, the practice has become more niche because retailers are typically seeking to become less reliant on the channel and limit commission paid to the publishers who are not adding incremental value.

**Company respondents – change since 2008**

Figure 11: Proportion of company respondents rating channels or disciplines as ‘excellent’ or ‘good’ for ROI

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Voice of the expert: email marketing is alive and kicking

“During a period of change for many in the marketing industry, with major legislative changes from the GDPR and use of personal data hitting the headlines, it’s reassuring to see that email remains the central strand for any multichannel marketing campaign, integrating seamlessly with both digital and physical channels.

“Email is and continues to be a key touchpoint and the universal identifier for any marketer. There are, however, barriers to effective use of email. For example, many of those surveyed agreed with our own ‘Marketer email tracker’ 2018 report published earlier this year that resource, time and technological limitations are key barriers to getting the most out of the channel.

“An impressive 74% of marketers rate the ROI email offers as ‘good’ or ‘excellent’, which has grown year-on-year, and highlighting that while phone numbers and postal addresses are important, the central point of contact for most marketers has coalesced around the email address.”

Rachel Aldighieri, Managing Director, DMA

“It’s no surprise that email marketing is still the marketing channel with the highest ROI. But what is noticeable, is the fact that 43% find their email marketing performance average. In this rapidly changing online market, average is just not good enough if you want to ensure continuous growth. That’s why one of the most important aspects of email marketing is continuous optimisation.

“Once you’ve set up an advanced automated email sequence, you need to keep coming back to it, and analyse your results, and then optimise based on your findings. This is where I think a lot of email marketers fall short. They spend a lot of time setting up their email marketing, and as long as the open and click rates look good (or average) they see no reason to change anything. My best advice: don’t ever stop optimising for better results. There’s always room for improvement.”

Rikke Thomsen, Head of Email Marketing, Sleeknote

“Email marketing has once again come out on top of the list of channels with the best ROI. This is great news for anyone who works in this long-standing channel, and proof that email marketing is in no way on its way out… Perhaps it’s the channel’s capacity to work successfully across the full customer lifecycle from acquisition to retention and win-back that allows it to generate return on investment time and time again.”

Natalie Rockall, Founder, Eleven11 Digital

“Marketers are still underinvesting in email marketing, despite it being the strongest performing channel for most. I believe this to be down to the problem that email marketing has created for itself – for most email marketers, even if you don’t do it so well, it creates a significant ROI. So, the marketer’s paradigm here is do you accept that and never really move forward? Or do you look at taking it to a whole new level? The choice is obvious but rarely made in favour of significant improvements to email marketing strategy through really investing in the channel.”

Philip Storey, Principal Email Marketing Consultant, Enchant Agency

“Could it really be true that so few companies think their email marketing is excellent? Are we complacent? Do we have no vision for future growth potential for this channel and so we settle for merely ‘good’? This would be discouraging, except Figure 9 and Figure 11 show email still rules comparatively on ROI and that most marketers don’t think any channel is ‘excellent’, and Figure 13 shows email can contribute up to a fifth of total revenue. Why are people still dissatisfied? I suggest a major mindset reset among marketers. Establish a new standard for performance, train people on how to get there and set new performance-based compensation targets.”

Stephanie (Sam) Miller, Lead Advisor for Digital Transformation, Econsultancy USA

“There is a continued curious dichotomy that the channel with the highest ROI is often the least invested channel. Does email continue to be seen as cheap, instead of low cost for high value?”

Tim Watson, Email Consultant, Zettasphere
4.2.3. Proportion of sales from email marketing

The chart below shows the proportion of sales attributed to the email marketing channel by responding companies. Last year, 61% of companies could attribute 20% or less of sales to email, a percentage which has now increased to 70%.

It is therefore no surprise that the average proportion of total sales that client-side marketers can attribute to their email marketing channel has dropped to 19% (Figure 13), down from 22% last year.

This decline may reflect the relative difficulty of attributing sales to email marketing. Consumers interact with email in different ways, and although they may not convert after immediately receiving an email (such as by clicking a link embedded in the email), they may decide to take an action later that will ultimately become a conversion, such as conducting a Google search or browsing the company website. These kinds of actions, however, are often not directly attributed to email.

This demonstrates the importance of selecting the right attribution model in order to determine the effectiveness of a marketing channel. Only by understanding how channels are delivering ROI is it possible to invest wisely in the right mix of marketing activities.

Company respondents
Figure 12: Approximately what proportion of your total sales can you attribute to the email marketing channel?
4.2.4. Proportion of marketing budget spent on email marketing

The following chart highlights the gap between the average proportion of total budgets email marketing accounts for, and the average proportion of sales that can be attributed to the channel.

It shows that email continues to punch above its weight in terms of the value it delivers to business, though the gap between the proportion of marketing budget spent on email, and sales generated, is not as striking as it has been in previous years. The average proportion of sales attributed to the email marketing channel is 19%, down three percentage points on last year. The average proportion of budget accounted for by email has remained at 15%, the same percentage as in 2017 and 2016.

Further analysis of the survey data shows that companies spending more than 20% of their marketing budget on email marketing are 33% more likely to rate the performance of their email campaigns as excellent’ or ‘good’ than their peers spending less than 20% (57% vs. 43%).

Furthermore, companies spending more than 20% of their marketing budget on email are nearly ten times more likely to attribute more than half of their sales to the channel (19% vs. 2%).

Company trends: 2012-2018

Figure 13: Average proportion of total marketing budgets email accounts for vs. average proportion of sales attributed to the email marketing channel

This fall in the average proportion of sales attributed to email marketing by survey respondents is likely not, as it may look, due to the channel not pulling its weight in the way it once did. It could simply reflect the difficulty associated with linking email activity to final sales, and consequently more caution in attributing sales directly to this channel.

As noted previously, email is often an important influencer channel within the customer journey, and so with a lack of multi-touch attribution, its true impact on the bottom line will continue to be missed. This will certainly be the case if a last-click attribution model is employed, as the customer’s last action may not come directly from email.
This is a problem that can snowball if companies are not careful. Marketers will be reluctant to invest in the channel if it continues to show relatively modest ROI, and could therefore be missing out on its full potential.

The gap between investment in email marketing and total sales that can be attributed to the channel is also closing from the perspective of agencies. While, on average, their clients are investing the same proportion of marketing budget on email as they were last year (19%), the average proportion of sales attributed to the email marketing channel has fallen one percentage point compared with last year, to 23%, though this is not statistically significant.

Agency trends: 2014-2018
Figure 14: Average proportion of total marketing budgets email accounts for vs. average proportion of sales attributed to the email marketing channel

Voice of the expert: a high ROI signals you could be doing more

“In high-conjecture – like the last couple of years – marketing budgets grow and the efficiency of the email channel kicks in. ROI should skyrocket. But a high ROI actually means that you are not using the channel to its full potential – there is more in the jar.”

Jordie van Rijn, founder of emailvendorselection.com and eMailMonday
Voice of the expert: the attribution problem

“As a channel, email marketing is delivering the goods. And this is, in all likelihood, with the channel being under-attributed because of how consumers use email. For example; the DMA Consumer Email Tracker Study 2017 found that the four top actions a consumer will take are: saving the email to refer to at a later date (59%), clicking on a link within the email (56%), keeping the information in mind for later use (54%) and going to the company’s website via another route, e.g. search (35%). Out of these top four actions, only one of them is being included in the email campaign attribution.”

Kath Pay, Founder and Senior Consultant, Holistic Email Marketing

“In a multichannel world, any channel-level assessment of ROI is totally dependent on a robust attribution of methodology and execution. It is no surprise to see email marketing leading the pack in this respect. However, I do suspect that slight, year-on-year falls in content marketing and social media (which are intrinsically linked) ROI performance are as much a function of measurement challenges as the underlying potential of these two channels.

“They are particularly powerful in the early stages of the purchase journey (awareness and consideration) and have a key role to play in demand generation – but this requires solid attribution modelling to recognise this. It is vital that their contribution to sales is fully recognised, quantified and reported upon to underpin good budget allocation decisions.”

Andrew Campbell, Martech Director, First 10
4.2.5. Annual spend on email marketing

For client-side marketers, there appears to be an overall reduction in spending on email marketing for companies with modest budgets, while the proportion of companies spending at least £100,000 has increased. The number of companies spending £5,001-£10,000 or £10,001-£25,000 a year on email marketing has fallen, while the figure for those spending £0-£5,000 has increased slightly. However, at the top end of the range, the proportion of companies spending at least £100,000 a year on email has climbed from 10% to 14%, matching the highest equivalent percentage in the history of the Email Census (Figure 16).

Company respondents
Figure 15: How much does your organisation spend on email marketing per year?

<table>
<thead>
<tr>
<th>Annual Spend Range</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>£0 – £5,000</td>
<td>30%</td>
<td>29%</td>
</tr>
<tr>
<td>£5,001 – £10,000</td>
<td>20%</td>
<td>17%</td>
</tr>
<tr>
<td>£10,001 – £25,000</td>
<td>17%</td>
<td>19%</td>
</tr>
<tr>
<td>£25,001 – £50,000</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>£50,001 – £100,000</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>£100,001 – £250,000</td>
<td>4%</td>
<td>7%</td>
</tr>
<tr>
<td>£250,000 plus</td>
<td>7%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Respondents 2018: 381
Respondents 2017: 652
Company trends: 2007 – 2018

Figure 16: How much does your organisation spend on email marketing per year?

![Chart showing email marketing spend by year (2007-2018)]

**Note:** The £250,000+ spending bracket wasn’t included in early versions of the Email Census, so those respondents are grouped in the £100,000+ bracket for the purposes of producing this chart.

The proportion of businesses investing up to £5,000 in email marketing on a yearly basis has risen slightly from 29% last year to 30% this year. It has been climbing slowly over the last three years, since dropping from 39% in 2015 to 28% in 2016.

On the agency side (Figure 17), the proportion of agencies reporting investment of more than £250,000 a year in their email marketing has fallen by a third, from 12% in 2017 to 8% in 2018.

As companies become more efficient at email marketing over time, they adopt more targeted strategies that deliver more pound for pound. Taking this more sophisticated approach means, in theory at least, that companies can spend less on sending big volumes of email and more on services that improve email marketing.
Voice of the expert: is email overachieving but undervalued?

“Sadly, for email, the fact remains that many brands are unable to accurately measure the business that email has generated and therefore in many instances it is incorrectly attributed and undervalued.

“Email isn’t always the last-click converting channel either and, as many reports have found, has a massive influence throughout a consumer’s journey to purchase that isn’t measured efficiently. In this report, and the DMA’s Marketer tracker, email marketers cite the lack of resources and budgets as a key challenge in optimising the channel. It’s evident from these results that more budget is needed to reap the rewards and potential of email marketing.”

Jenna Tiffany, Founder and Strategy Director, Let’s Talk Strategy

“Are brands underutilising the full power of email marketing by repeatedly assigning a low proportion of the overall marketing budget to the channel? The data seems to be showing us year after year that the proportion of sales attributed to have come from the email marketing channel is disproportionate to the proportion of budget assigned to the channel.

“Email is overachieving, but with increased budget we might argue that it’s possible to generate even more sales and increased ROI. With increased email marketing budgets brands could pay to explore opportunities like artificial intelligence and coding enhancements such as interactive modules in mobile.”

Natalie Rockall, Founder, Eleven11 Digital

“Email marketing is delivering positive ROI; however, we can’t simply rely on the innate strengths of the channel to keep in delivering the ROI. We, as marketers, need to take a step back away from the tactics and the technology, and formulate a robust strategy that is focused on our customers. The strategy, of course, involves tactics and technology – but it is not led by them, rather, it is led by the consumer’s needs. Once we develop a strategy based on these needs, we will see an uplift in ROI.

“Hopefully the C-suite will also see fit to invest more budget into this channel. With the exception of 2018, we can see that budget directly correlates to ROI.”

Kath Pay, Founder and Senior Consultant, Holistic Email Marketing
Agency respondents

Figure 17: How much do your clients typically spend on email marketing per year?

![Bar chart showing the percentage distribution of spending on email marketing per year for clients. The categories are £0 – £5,000, £5,001 – £10,000, £10,001 – £25,000, £25,001 – £50,000, £50,001 – £100,000, £100,001 – £250,000, and £250,000 plus. The chart compares the respondents in 2017 and 2018.]

Respondents 2018: 149
Respondents 2017: 275
4.3. Place in the organisation

4.3.1. Responsibility for email marketing

As can be seen from Figure 18, the trend towards email marketing being the responsibility of a team rather than an individual is continuing. In 2014, email marketing responsibility fell to a team, as part of wider marketing responsibilities for 38% of companies, but that percentage has been steadily increasing, reaching 46% this year.

Company respondents

Figure 18: Who is responsible for email marketing within your organisation?

There has been a corresponding decrease in the proportion of companies saying that email is the responsibility of an individual, as part of wider marketing responsibilities. Four years ago, 40% of businesses said that individuals took responsibility for email marketing, but that percentage is now only 27%. However, it should be noted that a not insignificant proportion of companies (11%) now have an individual dedicated to email marketing, up from 8% last year.

This trend towards email becoming a team responsibility is likely due to the multi-faceted nature of email marketing, which calls upon a lot of different skills and disciplines. As marketers face new, more complex challenges, it is becoming necessary to take a more integrated approach, which applies to marketing at large.
However, the benefit of having people dedicated to email marketing should be noted. As can be seen from Table 3, businesses with teams or individuals dedicated to the channel are nearly twice as likely to report excellent ROI from the channel than those whose teams or individuals take responsibility for it along with other marketing responsibilities (46% vs. 25%).

**Company respondents**

**Table 3: Email marketing ROI by responsibility**

<table>
<thead>
<tr>
<th></th>
<th>Excellent</th>
<th>Good</th>
<th>Average</th>
<th>Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual or team dedicated to email marketing</td>
<td>46%</td>
<td>38%</td>
<td>13%</td>
<td>3%</td>
</tr>
<tr>
<td>Individual or team, as part of wider marketing responsibilities</td>
<td>25%</td>
<td>45%</td>
<td>24%</td>
<td>6%</td>
</tr>
<tr>
<td>No-one responsible for email marketing</td>
<td>0%</td>
<td>67%</td>
<td>33%</td>
<td>0%</td>
</tr>
</tbody>
</table>

**Voice of the expert: email requires all hands on deck**

“There is a consistent shift over time to email being a collective undertaking involving a team of individuals (either as a dedicated email team or part of a wider marketing group). This reflects the increasing sophistication of email marketing efforts which inevitably involves an element of: campaign planning/journey planning; insight/analytics; copy writing; design and channel integration (on- and offline).

“This breadth is a challenging mix and one best served by a mix of disciplines and inputs. Even if you’re lucky enough to have an individual covering all these areas then you should actively look to spread the load to reduce risk.”

Andrew Campbell, Martech Director, First 10

“Nearly half (46%) of respondents stated that email marketing is part of a broader team and this is excellent news because email is multi-faceted and involves many different skill sets to make it truly successful, from strategy, analytics, UX, design, coding etc. However, it doesn’t necessarily mean that email has dedicated resources to the team.

“Many brands state they are under-resourced to support the channel efficiently and, unlike other digital channels such as SEO and PPC where there are dedicated individuals with a sole focus on optimising that channel, that is still rarely the case for email where the responsibility is often shared across an increasingly demanding digital marketing manager’s desk.”

Jenna Tiffany, Founder and Strategy Director, Let’s Talk Strategy
A similar trend can be seen from the perspective of agency respondents, with over time more teams (as part of wider marketing responsibilities) and fewer individuals (as part of wider marketing responsibilities) taking on email marketing (Figure 19).

Agency respondents
Figure 19: Who is typically responsible for email marketing within your clients’ organisations?
4.3.2. Time spent on email activities

*Figure 20* shows the average amount of time companies are spending on different email-related activities for a typical campaign. The picture is not dissimilar to last year, with responding companies saying that most time is spent on design and content. However, the proportion of companies reporting that more than eight hours are consumed with strategy and planning has increased from 9% last year (*Figure 21*) to 15% this year.

Design and content are making greater demands on marketers’ time, with 18% of respondents saying that they spend more than eight hours on it internally during a typical campaign. Although the best ESPs have made building campaigns far more straightforward, it may be the case that marketers are spending this time on design and content to ensure they can deliver content that is more personalised to the recipient. More advanced segmentation means that marketers need to create more types of content for different groups of people.

As was the case last year, companies are spending the least amount of time internally on mobile optimisation and transmission, probably because these processes are handled by their email marketing platforms, requiring less intervention from marketing teams.

Company respondents

*Figure 20*: For a typical campaign, how many hours are spent internally on the following email-related activities?

In a shift from last year, the proportion of businesses spending at least two hours on email-related reporting has risen from 25% to 30% in 2018, an encouraging development in that more marketers are seemingly paying more attention to the effectiveness of their email campaigns and whether they are delivering ROI.

Similarly, more companies are spending at least two hours per campaign on data (37% vs. 32%), an important area of focus for those seeking to make their email more relevant for customers and prospects as part of integrated – and increasingly automated – marketing activities, while remaining on the right side of the law.
### Voice of the expert: email is becoming more sophisticated

“It is surprising to see a lack of growth in optimising email for mobile devices considering the smartphone is the most used device when accessing email. The most encouraging result is the increase in time spent on strategy and planning of email campaigns.

“Historically, email has come from a very tactical place where little time was spent on strategising and planning campaigns as it was typically used as a push channel. However, now that email has a vital role to play in the customer journey, following a conversion strategy is key to keeping up with ever-changing consumer demands. The sophistication in email technology also enables marketers to spend more time planning and fewer hours spent manually creating email campaigns that are now automated.”

**Jenna Tiffany, Founder and Strategy Director, Let’s Talk Strategy**

“The increased (year-on-year) amount of time devoted to ‘data’ reflects the increasing sophistication of email as a channel, with triggering, personalisation and automation increasingly common – and data-dependent. Without strong data foundations it is impossible to achieve mature email capabilities and campaign performance.”

**Andrew Campbell, Martech Director, First 10**
When it comes to agencies and their view on where clients’ time is spent, the picture is similar to that of in-company respondents. However, a significantly greater proportion of agencies report that more than eight hours are being spent on design and content per campaign (24% vs. 18%). Agencies also report more time spent with data, with 14% of agencies saying that more than eight hours are spent on this area of activity compared with 10% for company respondents.

Agency respondents

Figure 22: For a typical campaign, how many hours do your clients spend on the following email-related activities?

![Bar chart showing time spent on various email-related activities by clients and agency respondents.](chart.png)
4.4. Optimising for different devices

4.4.1. Strategy for optimising email for different devices

One of the biggest opportunities – and challenges – that email marketers continue to face in 2018 is the proliferation of mobile devices and associated usage. More than three-quarters (76%) of UK adults now own smartphones, according to Ofcom’s 2017 Communications Market Report². Furthermore, more than four in ten (42%) internet users now view smartphones as their most important online access tool, putting them above tablets and desktops.

Email usage has increasingly gone mobile, too. Behavioural research by Ofcom in late 2016 found nearly nine out of ten (89%) smartphone users to be accessing email via their mobile devices, and greater mobile usage of email than mobile messaging, social networking or instant messaging.

This shift has brought not just greater complexity to the design and delivery of content to different mobile platforms, but also a need to understand how consumer habits have changed when developing email campaigns.

Timeliness and relevance have become critical. Google’s Think with Google content marketing team has often referenced the idea of ‘micro-moments’³ – ‘intent-rich’ instances consumers now undergo at numerous points during the day (and at night, too), where they often turn to their smartphones for information and guidance. The fleeting nature of these events makes the science behind reaching the right user at the right time all the more challenging.

Even though mobile email usage is hardly a new trend, many marketers are still figuring out how best to adapt to it and turn it to their advantage. Seven in ten company respondents now optimise their emails for mobile devices as part of normal practice (Figure 2). However, very few – only 2% – describe themselves as ‘very advanced’, strategically, when it comes to mobile optimisation (Figure 23). This is a drop from previous years, reflecting how difficult it is to remain in tune with the behaviour of the modern mobile consumer, and the technical complexities thrown up by different mobile platforms.

Across a five-year timeframe, there is a somewhat disappointing picture of progress in this vital area of the industry, contrasting with mobile’s rapid rise. Much fewer respondents now deem their optimisation strategy ‘non-existent’ (10%, down from 22% in 2014), but the tendency remains for many to see their efforts as merely ‘basic’ or ‘moderate’ (74%, versus 62% in 2014).

² https://www.ofcom.org.uk/research-and-data/multi-sector-research/cmr
Company respondents

Figure 23: How would you describe the extent to which your company has a strategy for optimising email marketing for different devices?

Note: Between 2014 and 2016, this question was phrased as follows: 'How would you describe the extent to which your company has a strategy for optimising email marketing for mobile devices?'

Respondents 2018: 361 | 2017: 635
4.4.2. Tactics used for device optimisation

Tied in with this slow gestation of mobile strategy among email marketers are signs that adoption of mobile tactics is still somewhat piecemeal. Only 40% of respondents describe their attitude towards email campaigns as ‘mobile-first’ (Figure 24). This is a rise of seven percentage points on 2017, but still indicates that most practitioners are yet to approach targeting of mobile users holistically and separately from all of their tried-and-tested, desktop-led practices.

The danger, here, is of a widening gap between email design and how users interact with their mobile devices, making change both urgent and harder to implement.

In some smartphone-dominated markets, discussion has already been turning to whether a mobile-first philosophy will soon morph to ‘mobile-only’. Randall Rothenberg, President and Chief Executive of the Interactive Advertising Bureau, said in 2017 that “you have to actually adjust to the fact that this is a mobile-only world. Already, in the USA, two-thirds of all consumers are spending the majority of their digital time on mobile devices, and in some parts of the world it is far more than that.”

There is a mixed picture when it comes to adoption of best practices for mobile-friendly email marketing. Overall, we have already seen that slightly fewer company respondents than last year report they are optimising email for mobile devices than in 2017 (70%, down from 73%, Figure 3). This suggests there remains a fixed group of companies that have been unable to update traditional approaches thus far (although the majority of the remainder at least now indicate plans to begin optimisation).

Encouragingly, though, adoption of individual, mobile-oriented techniques is steadily rising within the segment of email marketers that have moved down the road towards a mobile-first mindset (Figure 24). Since 2017, more marketers have begun introducing shorter subject lines and tailored pre-header text for promotion, to better catch attention in mobile inboxes (59% and 49%, respectively).

Most respondents also now focus on design hygiene factors, such as adapting email templates to be more responsive and dynamic, render more effectively, and offer easy-to-tap calls to action. Moreover, there is a steady increase in the proportion of marketers that are now thinking beyond the email itself, for example by instituting responsive landing pages in a bid to increase conversion rates among mobile users.

Voice of the expert: mobile optimisation

“Optimising email marketing for different devices is still a crucial factor of success for most brands. I always encourage my clients to take a look at the device data held within their email service provider, and to monitor emerging and changing patterns in this area as it can move surprisingly quickly. While it’s great to see a lot of brands have cracked responsive templates, and/or adapted their email designs and subject lines in order to optimise, I’d like to see more brands working through the journey past the email click on mobile devices. Not only are responsive landing pages important but also the ability to call a sales or service number included in an email easily and quickly, being able to find a local store to visit, or how to save a voucher on their device to be used onsite. These are all important factors in getting a conversion.”

Natalie Rockall, Founder, Eleven11 Digital

Company respondents
Figure 24: What have you done to optimise email marketing for different devices?

- Created a responsive email template: 66% (2018), 66% (2017)
- Adapted email design to have a simpler template that renders well on all devices: 59% (2018), 59% (2017)
- Shorter subject lines (key message in the first 30 characters): 52% (2018), 59% (2017)
- Responsive landing pages: 50% (2018), 55% (2017)
- Adapted email template to have easy-to-tap calls to action: 49% (2018), 53% (2017)
- Using pre-header text for promotion: 45% (2018), 49% (2017)
- Thinking ‘mobile first’, everything we do is designed for mobile: 33% (2018), 40% (2017)
- None of the above: 6% (2018), 3% (2017)

Note: Respondents could select all the options that applied.

Respondents 2018: 346
Respondents 2017: 618
4.4.3. Barriers to optimisation success

There remains a wide range of explanations for the slow nature of email marketers’ shift towards mobile-first approaches.

Optimisation is one obvious – but by no means the only – area where email marketing suffers from the ongoing mismatch in its share of budget versus its contribution to sales (Figure 13). A quarter of company respondents see lack of resources (including budget and staff) as the main barrier to progress on optimisation, making it the most prominent hurdle to overcome. Limitations on time and technology are also holding many companies back (both cited by 14% of respondents).

There is a sense that ‘softer’ factors are becoming increasingly significant as the complexity of optimising email campaigns increases. A bigger proportion of company respondents now cite lack of skills as a key barrier (11%, up from 8% in 2017).

A more fundamental lack of understanding of email optimisation and its benefits is also highlighted, particularly by agency respondents who are more likely to be in tune with higher-complexity aspects of email campaigns, such as mobile usage trends. One in five (20%) agency respondents point to this as the greatest barrier to client mobile optimisation success, a three-percentage-point-rise on 2017 (Figure 26).

Meanwhile, there is a sharp rise in the proportion of agency respondents (6% to 13%) citing difficulty measuring ROI and building the business case for optimisation as the key barrier for their clients.

Company respondents

Figure 25: What is the main barrier to success when it comes to effectively optimising your email campaigns for different devices?

![Bar chart showing the main barriers to success in optimising email campaigns for different devices.](chart.png)

- **Lack of resources (including budget and staff)**: 25% (2017), 26% (2018)
- **Finding the time to make it happen**: 14% (2017), 17% (2018)
- **Technology limitations**: 14% (2017), 17% (2018)
- **Lack of skills**: 8% (2017), 11% (2018)
- **Lack of understanding within the organisation**: 9% (2017), 10% (2018)
- **Difficulty measuring ROI and building business case**: 8% (2017), 9% (2018)
- **Organisational silos**: 6% (2017), 7% (2018)
- **Tied to tradition**: 5% (2017), 6% (2018)
- **Other**: 4% (2017), 4% (2018)

Respondents 2018: 336
Respondents 2017: 606
Agency respondents
Figure 26: Thinking about your clients, what is the main barrier to success when it comes to effectively optimising their email campaigns for different devices?

<table>
<thead>
<tr>
<th>Barriers</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lack of resources (including budget and staff)</td>
<td>24%</td>
<td>28%</td>
</tr>
<tr>
<td>Lack of understanding within the organisation</td>
<td>20%</td>
<td>17%</td>
</tr>
<tr>
<td>Difficulty measuring ROI and building business case</td>
<td>13%</td>
<td>6%</td>
</tr>
<tr>
<td>Tied to tradition</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>Finding the time to make it happen</td>
<td>11%</td>
<td>9%</td>
</tr>
<tr>
<td>Organisational silos</td>
<td>8%</td>
<td>9%</td>
</tr>
<tr>
<td>Lack of skills</td>
<td>7%</td>
<td>9%</td>
</tr>
<tr>
<td>Technology limitations</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Respondents 2018: 128  
Respondents 2017: 235

Voice of the expert: the opportunity for email vendors

“These barriers expose a huge opportunity for email delivery vendors. Optimisation, personalisation and basic device experience management have got to be built into the tools. The more tools become commoditised, which has been happening for ten years now, the more vendors need to automate activities that add value and improve productivity. Focus people on strategy and content development, enable technology to automate basic functionality.”

Stephanie (Sam) Miller, Lead Advisor for Digital Transformation, Econsultancy USA
4.5. Personalisation

4.5.1. Ability to provide personalised email campaigns

Personalisation has long been talked up as one of the key areas where email marketing has the potential to progress as a channel to communicate with users and contribute even more significantly to customer experience improvement efforts.

The promise is simple: drive increases in return on investment by giving each individual customer timely and relevant information on what is important to them, rather than pinning hopes on blanket emails that are increasingly being drowned out in the maelstrom of modern-day digital communications. With email marketing being based on a unique identifier – the email address – it starts with a foot-in-the-door when it comes to initiating one-to-one conversations with customers.

The significance of personalisation as a differentiator is shown in Table 4. Among email marketers that are most confident about their personalisation abilities – having secured the ability to send emails based on individual activities and preferences throughout the funnel at scale – more than seven in ten (71%) describe their payback from email campaigns as ‘excellent’ or ‘good’, compared to 63% of companies who are still fine-tuning these capabilities, and 41% of those who are in the early stages of personalisation implementation. Almost four out of five (79%) companies that are not even thinking about personalisation deem their email marketing efforts ‘average’ or ‘poor’.

While personalisation is not an end in itself, it seems getting to grips with it can be a key difference between delivering great email marketing and moving beyond standard fare.

Company respondents Table 4: Cross-tabulation of responses for: ‘Which statement best describes your ability to provide personalised email campaigns?’ and ‘How do you rate the performance of your company’s email campaigns?’

<table>
<thead>
<tr>
<th></th>
<th>Excellent</th>
<th>Good</th>
<th>Average</th>
<th>Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>We can send emails based on individual activities and preferences throughout the funnel at scale</td>
<td>7%</td>
<td>64%</td>
<td>26%</td>
<td>3%</td>
</tr>
<tr>
<td>We have most of the technical capabilities, but we need to fine-tune the integration and our execution</td>
<td>2%</td>
<td>61%</td>
<td>32%</td>
<td>5%</td>
</tr>
<tr>
<td>We are in the early stages of implementing personalisation in our email campaigns</td>
<td>2%</td>
<td>39%</td>
<td>48%</td>
<td>11%</td>
</tr>
<tr>
<td>We are not yet working towards this</td>
<td>2%</td>
<td>19%</td>
<td>65%</td>
<td>14%</td>
</tr>
</tbody>
</table>
Delivery on the potential of personalisation remains highly complex, however, and few marketers claim to have risen to ninja status. Only 13% of company respondents assert that they can now conduct email marketing campaigns at scale based on individual activities and preferences throughout the funnel (Figure 27). Strikingly, this is a two-percentage-point drop on 2017. Most email marketers (61%) still fall into either the bracket of having to begin work on personalisation or remaining in the early stages of doing so.

Agency respondents present a slightly more positive picture (Figure 28). A majority (54%) of supply-side research participants say their clients are typically either delivering scaled, one-to-one email marketing, or at least have the technical capabilities in place while they fine-tune execution and integration. Nonetheless, the large proportion of respondents that are yet to get into gear in this realm of email marketing is a reflection that personalisation is not an end-goal in itself, and doesn’t operate in isolation. It is a journey that requires co-ordinated planning and needs to be directed towards a clear strategic destination, fitting in with wider customer experience goals.

In terms of technology, many brands now have personalisation capabilities, but these are only the starting point. Kath Pay, Founder of Holistic Email Marketing, and one of the guest contributors to the Email Census, recently wrote on the Econsultancy blog that personalisation capabilities should not be used ‘just because you can’. Instead, email marketers need to ensure that four ingredients – strategy, data, content and technology – are in place before embarking on personalised campaigns. “When you let technology rather than strategy drive your decision-making, you can end up sending the wrong message to your customers,” she adds.

**Voice of the expert: the personalisation opportunity**

“Personalisation provides a vast and exciting opportunity to email marketers to bring to life the desired ‘right time, right message, right person’ journey. Although only 13% of respondents state that they are sending emails based on individual activities and preferences at scale, the technology has been available for some time, which demonstrates it’s being underutilised. It’s insightful to see that 45% of marketers are in the early stages of implementing personalisation into their email campaigns, which provides an exciting prospect for the future of email. Personalisation puts the sexy back in email marketing! However, it is vital that the technology doesn’t come first, and that a clear strategy is defined to ensure that the journey created is of value to the consumer as well as the brand.”

**Jenna Tiffany, Founder and Strategy Director, Let’s Talk Strategy**

“For years we’ve been predicting that personalisation within email marketing will take off in a big way. However, as with the uptake of dynamic content, it’s been slow. Considering email has the immense benefit of being able to personalise on a unique ID, i.e. the email address, whereas other channels have to reply upon a cookie or similar, which is more akin to personalisation by device than by individual, it’s hard to understand the slowness in the uptake.

“Aside from what everyone designates as being the main issue – data integration (as per Figure 29) – personalisation is an art, which very few marketers are trained in, so it’s a new skill to be learnt. But even more than this, I believe the main reason is the same reason as to why dynamic content isn’t used as much as was predicted. It’s dealing with the unknown. It means that by applying personalisation or dynamic content (a form of personalisation), marketers can’t explicitly control who gets what and are unable to track and record the results in detail, and maybe they’re fearful of this? With experience and education, personalisation should become less of an unknown.”

**Kath Pay, Founder and Senior Consultant, Holistic Email Marketing**

“The industry is still struggling with the challenge of personalised campaigns. There is no disagreement in the industry that personalisation is the goal. The fact that progress towards this feels like one step forward, two back, is a reflection on the technical integration and effort needed to really nail this. Remember that whilst the vision may be perfection in personalisation, every small imperfect step is a step forward.”

**Tim Watson, Email Consultant, Zettasphere**

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Company respondents

Figure 27: Which statement best describes your ability to provide personalized email campaigns?

- We can send emails based on individual activities and preferences throughout the funnel at scale:
  - 2016: 15%
  - 2017: 13%
  - 2018: 8%

- We have most of the technical capabilities, but we need to fine-tune the integration and our execution:
  - 2016: 30%
  - 2017: 26%
  - 2018: 23%

- We are in the early stages of implementing personalisation in our email campaigns:
  - 2016: 48%
  - 2017: 45%
  - 2018: 46%

- We are not yet working towards this:
  - 2016: 16%
  - 2017: 14%
  - 2018: 16%

Respondents 2018: 325
2017: 585 | 2016: 496

Agency respondents

Figure 28: Which statement typically describes your clients’ ability to provide personalized email campaigns?

- They can send emails based on individual activities and preferences throughout the funnel at scale:
  - 2016: 24%
  - 2017: 25%
  - 2018: 17%

- They have most of the technical capabilities, but they need to fine-tune the integration and execution:
  - 2016: 30%
  - 2017: 25%
  - 2018: 25%

- They are in the early stages of implementing personalisation in their email campaigns:
  - 2016: 33%
  - 2017: 44%
  - 2018: 34%

- They are not yet working towards this:
  - 2016: 13%
  - 2017: 14%
  - 2018: 16%

Respondents 2018: 129
2017: 219 | 2016: 220
4.5.2. Personalisation challenges

The broad range of factors that need to come together for success in personalisation of email marketing is represented in Figure 29. As always, general organisational bandwidth is a key issue. Lack of resources and just finding the time to make it happen are both seen as major challenges by more than three in ten respondents, whether client- or agency-side.

As was the case in 2017, most respondents cite integrating data as a key pain point. Personalisation is overwhelmingly data-driven, requiring reliable and useful information on individual customers in order to provide them with content that is genuinely of interest, and in alignment with company goals. However, businesses remain challenged when it comes to integrating information from different marketing databases and achieving this level of granularity.

This is especially difficult when they are wedded to clunky and outdated systems, and struggling to gain management support for an upgrade. Data challenges are often compounded, or even initiated, by inadequate technology, whether in terms of email marketing software or other IT applications and databases these systems need to interface with. Nearly a third (31%) of company respondents cite technology shortfalls as one of their main challenges – only a one-percentage-point improvement in this area since 2017.

Beyond integration headaches, some respondents anecdotally report being overwhelmed by the volume of data they have available, obscuring insights, as well as the widely-cited issue of ‘dirty data’ – being beset by information that is outdated, duplicated and/or error-ridden, and which obviously gives a flaky base on which to launch into a one-to-one conversation with customers.

Complicating things further are new obligations introduced under the European Commission’s General Data Protection Regulation in May 2018.

Specialist skills are another key facet of personalisation – whether in smoothing data integration, technically, or in having the requisite expertise to formulate strategic plans based on the best datasets to capture and exploit for insight. While lack of skills is not one of the most prominently referenced pain points, more than a quarter (26%) of company respondents cite understanding where to focus as a key hurdle. This rises to 35% among agency practitioners, when viewing their clients’ main challenges.

**Voice of the expert: overcoming personalisation barriers**

“Personalisation is no longer a nice-to-have. If you want to create great results, you need to make personalisation a fundamental element of your strategy. Choose an agency to help you explore the best platforms for you. Seek advice and you’ll quickly bridge the knowledge and technology platform gaps. Personalisation in email is so effective, ignore it at your peril.”

*Philip Storey, Principal Email Marketing Consultant, Enchant Agency*

“Both this report and the DMA ‘Marketer email tracker’ have the same results on the challenge data provides email marketers who are aiming to try to be more sophisticated in their email strategy.

“Legacy systems are a huge barrier when integrating data and continue to be a bugbear of many marketers and a hindrance to the development of email. However, as technology becomes more sophisticated, many systems can now overcome these barriers and provide alternative solutions when integrating data. The brands I have worked with that have achieved smooth data migration projects are those that are rigorously planned, with adequate resources or outsourced agencies that liaise on the client’s behalf, so the projects progress as expected. Outlining the key goals of the migration also helps to ensure that you are choosing technology fit-for-purpose, reducing the reoccurrence after migrating of having the same barrier in the future.”

*Jenna Tiffany, Founder and Strategy Director, Let’s Talk Strategy*
Voice of the expert: overcoming personalisation barriers (cont.)

“Agency respondents will be working with bigger brands, and they inevitably face greater data integration challenges due to legacy systems, larger data ecosystems and more formalised IT processes. This is where smaller businesses have an advantage over their bigger rivals. This advantage is compounded by the increasing usability and power of email platforms, which enables relatively low-cost email platforms to support sophisticated email techniques. Email therefore offers a great opportunity for challenger brands to steal a march and win sales from larger competitors.”

Andrew Campbell, Martech Director, First 10

Company respondents

Figure 29: What are the main challenges you have faced in trying to implement more email personalisation?

- Integrating data: 55% (2018), 55% (2017)
- Lack of resources: 36% (2018), 34% (2017)
- Finding time to make it happen: 33% (2018), 34% (2017)
- Understanding where to focus: 26% (2018), 28% (2017)
- Lack of skills: 16% (2018), 17% (2017)
- Organisational buy-in: 10% (2018), 12% (2017)
- Lack of budget: 8% (2018), 10% (2017)
- Other: 3% (2018), 3% (2017)

Respondents 2018: 322
Respondents 2017: 577

Note: Respondents could select up to three options.
Agency respondents

Figure 30: What are the main challenges your clients have faced in trying to implement more email personalisation?

- Integrating data: 2018: 43% (58%), 2017: 34% (37%)
- Lack of resources: 2018: 34% (37%), 2017: 35% (35%)
- Understanding where to focus: 2018: 28% (31%), 2017: 35% (35%)
- Finding time to make it happen: 2018: 25% (27%), 2017: 28% (31%)
- Establishing processes and rules: 2018: 25% (27%), 2017: 25% (25%)
- Technology shortfall: 2018: 25% (25%), 2017: 25% (25%)
- Lack of skills: 2018: 21% (31%), 2017: 25% (25%)
- Lack of budget: 2018: 14% (15%), 2017: 15% (15%)
- Organisational buy-in: 2018: 13% (10%), 2017: 15% (15%)
- Other: 2018: 1% (2%)

Note: Respondents could select up to three options.

Respondents 2018: 126
Respondents 2017: 216
Figure 31: Please elaborate on any specific challenges you (or your clients) have faced in personalising your (or their) email marketing.

Voice of the marketer: email-related personalisation challenges

“Data integration remains our main challenge, in that we collect data through various systems, and getting them to all connect to our SCV is proving a challenge.”

“Data paralysis – staff get overwhelmed by too much data and can’t seem to make it work for them. Then nothing is done. We are making progress, but it is slow-going.”

“Gathering, implementing and processing data which will be compliant with new EU privacy regulations.”

“[We] need to plan the email strategy better, understand the segments and only then we can personalise the message.”

“Our data is not currently clean enough to trust, we can’t commit to personalisation on any level as it’s deemed as a risk.”

“Our email marketing software is sub-par and our leadership does not see the value in investing in more robust software that offers features like automation.”

“Reducing latency is a key topic as well as effectiveness of data transfer from one platform to another. Given that most of our personalisation is complex, this automatically adds strain to the data platform and prevents us from sending personalised emails.”

“We currently do not have the right set of skills in the business to lead the strategy on identifying the right data to capture, and then how to utilise it to improve performance.”

“We have a terrible, clunky database which doesn’t help at all.”

“Getting a strategy plus budget to try it out and proving ROI.”

“Especially lack of resources and time to navigate through the data and determine which behavioural patterns to focus when personalising emails.”

“We’ve found our clients struggle to make the time to even put together a proof of concept to get the buy-in from top management. This has the knock-on effect of budget not being released.”
4.5.3. What would email marketers like to improve?

The ongoing gap between promise and reality on email marketing personalisation is evident in Figure 32. When asked what they would like to do with their email marketing that they currently cannot do to their satisfaction, 68% of company respondents cited *better personalisation*. This was two percentage points higher than 2017, and means that personalisation remains the most popular choice when it comes to respondents’ frustrated ambitions around email marketing.

Closely related objectives such as gaining *cross-channel data insights to see the bigger picture*, smoothing *integration with other marketing platforms*, and securing the *ability to be more agile in their marketing*, also feature prominently.

As with 2017, personalisation’s sibling – segmentation – is the second-most commonly-cited area of frustration. Both personalisation and segmentation are often presented as key reasons to invest in email marketing, and to take advantage of its inherent potential as a scalable and customisable communications channel. It is striking, therefore, that many marketers – whether held back by technology or process – are not yet meeting their objectives in these areas.

As noted earlier in this report (Figure 2), less than a third of company respondents report they are participating in *advanced segmentation* – moving beyond division of customers into basic categories such as gender or geography, and into more granular and nuanced groups, often based on behaviour. This is not down to a lack of interest. A notably large portion of marketers (43%) are planning to move into this area but have yet to firm things up.

**Voice of the expert: segmentation**

“Segmentation is thinking in groups. The first step is easy on resources and budget, be less irrelevant and don’t send email to groups and people that can’t act on them. Second is where it gets interesting, quickly. Instead of segmenting your complete database, select one identifiable group that has high improvement potential – and blow their minds with super-targeted, personalised and valuable messaging. Instead of trying to be everything for everyone, you’ll be meaning something to someone. And that type of segmentation inevitably leads to more personalisation.”

Jordie van Rijn, Founder, emailvendorselection.com and eMailMonday
Company respondents
Figure 32: What would you like to do with your email marketing that you currently cannot do to your satisfaction?

Note: Respondents could select all the options that applied.
Agency respondents

Figure 33: What would your clients like to do with their email marketing that they currently cannot do to their satisfaction?

Respondents 2018: 112
Respondents 2017: 202

Note: Respondents could select all the options that applied.
4.6. Marketing automation

4.6.1. Automation triggers

For email marketers looking to increase efficiency and squeeze more yield from their investments, marketing automation remains an area of great promise. The automated distribution of emails to customers, based on specific triggers, opens up opportunities to usher leads through the sales funnel in a way that would be impossible manually. It can also be a comparatively easy-to-grasp pitch for investment from the C-suite.

It remains clear, though, that many practitioners are yet to fully realise the potential of marketing automation tools and overcome the organisational and technical hurdles associated with them. To successfully match responses to consumer behaviour, automation tools must be fed data, but capturing and delivering this data from different parts of the organisation is notoriously challenging.

The survey results show that the lure of automation remains strong. More than half of company respondents cite using automation to enable one-to-one communication as a key area of innovation where they intend to focus in 2018 (Figure 41). Additionally, as mentioned at the start of this report, marketing automation capability continues to be seen as the most important attribute of email technology providers (Figure 1), so is considered a must-have rather than a nice-to-have by many brands and agencies, and a key differentiator for email platform providers.

Figure 34 and Figure 35 demonstrate steadily increasing use of marketing automation for a broad range of triggers or behaviours, and beyond lower-hanging fruit such as in response to subscriptions or other sign-ups. Automated emails in response to basket abandonments have seen the fastest rise, with 29% of respondents now doing so, up from 24% in 2017. On the agency side, there are encouraging signs of increased adoption of more sophisticated marketing automation use cases such as up-sell and cross-sell. Adoption of these techniques among their clients is up 12 and nine percentage points, respectively. Despite the increased uptake for some of these automated email tactics, the very low proportion of company respondents saying they automate emails for up-sell and cross-sell (14% and 17% respectively) is a missed opportunity for businesses seeking to increase their revenues. These percentages have not moved significantly since last year.

Voice of the expert: marketing automation

“Many brands have already completed a first level of automation. And for good reason: it’s an excellent strategy to layer into an integrated approach that uses both broadcast and automated emails. Be clear on how you’ll solve the biggest automation challenge: data integration. Comprehensive automations need behavioural, conversion and CRM data to be combined. Look for technology that allows the contents of automated emails to be dynamic, as the Achilles heel of automation can be having to use generic or ever-green content rather than something more relevant to the person or time of year.”

Tim Watson, Email Consultant, Zettasphere

“Automation has now become an essential tool for an email marketer who has many plates to spin. I have worked with many brands over the past year who have added automation to the very top of their technology requirement list, and I only see that trend growing and growing. There will be a point where marketing automation is no longer a requirement; it is a given necessity to be able to provide the timely and personalised email experience that all brands are striving to achieve. The critical element here is defining a robust strategy to fully utilise automation to its full potential – something which only a handful of brands have genuinely started to achieve. As the approach to email marketing becomes more sophisticated so, in turn, do the requirements of the technology, and in the future, this is likely to advance the need for automated AI.”

Jenna Tiffany, Founder and Strategy Director, Let’s Talk Strategy
Company respondents

Figure 34: Do you send out automated emails based on the following triggers or behaviour?

<table>
<thead>
<tr>
<th>Trigger</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subscription or sign-up to website</td>
<td>16%</td>
<td>19%</td>
</tr>
<tr>
<td>Automated response to website visit / sign-up</td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td>Abandoned basket</td>
<td>14%</td>
<td>17%</td>
</tr>
<tr>
<td>Lapsed customers</td>
<td>14%</td>
<td>16%</td>
</tr>
<tr>
<td>Click-through but no purchase</td>
<td>13%</td>
<td>14%</td>
</tr>
<tr>
<td>Selling complementary products (cross-sell)</td>
<td>13%</td>
<td>14%</td>
</tr>
<tr>
<td>Date notifications (e.g. birthdays, anniversaries)</td>
<td>13%</td>
<td>14%</td>
</tr>
<tr>
<td>Content downloaded (e.g. product information or white paper)</td>
<td>13%</td>
<td>14%</td>
</tr>
<tr>
<td>Timed content programme across sales cycle</td>
<td>13%</td>
<td>14%</td>
</tr>
<tr>
<td>Subscription due for renewal</td>
<td>13%</td>
<td>14%</td>
</tr>
<tr>
<td>Up-sell</td>
<td>13%</td>
<td>14%</td>
</tr>
<tr>
<td>Content viewed on site</td>
<td>13%</td>
<td>14%</td>
</tr>
</tbody>
</table>

Respondents 2018: 314
Respondents 2017: 568
Agency respondents

Figure 35: Do your clients send out automated emails based on the following triggers or behaviour?

- Subscription or sign-up to website: 55% in 2018, 51% in 2017
- Automated response to website visit / sign-up: 39% in 2018, 36% in 2017
- Content downloaded (e.g. product information or white paper): 42% in 2018, 36% in 2017
- Abandoned basket: 33% in 2018, 28% in 2017
- Up-sell: 33% in 2018, 21% in 2017
- Click-through but no purchase: 31% in 2018, 26% in 2017
- Lapsed customers: 31% in 2018, 30% in 2017
- Selling complementary products (cross-sell): 29% in 2018, 20% in 2017
- Date notifications (e.g. birthdays, anniversaries): 33% in 2018, 25% in 2017
- Subscription due for renewal: 28% in 2018, 25% in 2017
- Content viewed on site: 25% in 2018, 20% in 2017
- Timed content programme across sales cycle: 24% in 2018, 25% in 2017

Respondents 2018: 126
Respondents 2017: 208
4.6.2. Success with automation

It remains evident that many email marketers are yet to truly get to grips with automation. As with many other aspects of email marketing, data integration is a key challenge, and the automation capabilities of different platforms are seen as varying, including around issues such as dynamic content and personalisation of automated messages. Automation also requires a strategic, rather than piecemeal, approach from the start.

These complexities are evident in the rather lukewarm set of responses displayed in Figure 36. A large and increased proportion of company-side marketers deem their automated email marketing programmes ‘not successful’ (37%, up four percentage points since 2017). The majority remain in the hinterland of ‘quite successful’ (55%) initiatives.

Even among agency respondents (Figure 37), with their comparative advantages on shared resource and knowledge, many see their clients’ automated email marketing programmes as ‘not successful’ (27%). Only 14% have proved ‘very successful’, although this is a slight rise on 2017 (12%).

Company respondents
Figure 36: How successful would you say you have been in implementing automated email marketing programmes?

Voice of the expert: marketing automation strategy

“If email marketing automation isn’t successful for you, it’s highly likely that you’re missing something of a key element in your strategic approach to automation. Automating email marketing campaigns is so lucrative, but it won’t yield anything like the potential it has for you, if you don’t create a solid strategy. Think about what will drive revenue, but also start by thinking about what will make the greatest positive impact to the customer journey and experience. This is where the uplifts in revenue lie too...”

Philip Storey, Principal Email Marketing Consultant, Enchant Agency
Agency respondents

Figure 37: How successful would you say your clients have been in implementing automated email marketing programmes?

[Bar chart showing the percentage of respondents who found their clients very successful, quite successful, or not successful in implementing automated email marketing programmes for different years (2014-2018).]

Respondents 2018: 122 | 2017: 206
4.7. Improving email marketing for the future

4.7.1. Use of predictive or intelligent solutions

Predictive analytics has for some years been presented as offering significant potential to increase the efficiency and effectiveness of email marketing, alongside other enablers such as automation, segmentation and personalisation.

By identifying patterns in behavioural data, the premise is that email timing and content – as well as other variables – can be tweaked to better engage individual customers or segments, and improve acquisition, retention and conversion. As elsewhere, its promise plays into the notion that if brands and their partners can crack challenges around data and automation, email marketing still has huge room to develop as a one-to-one channel to customers, and to further build on its position as a strong generator of commercial uplift.

Our research shows a solid level of interest in predictive or intelligent solutions among email marketers (Figure 38). Most company respondents have considered, trialled or implemented predictive solutions for adaptation of emails’ scheduling/frequency (69%), content (58%), or the product selection (53%) presented to recipients. Predictive adaptation of language/wording – a nuanced task – has still caught the attention of nearly half of respondents (48%). As is natural, implementation of all these techniques is higher among agency clients.

Company respondents

Figure 38: In which of the following areas have you implemented predictive or intelligent solutions (including artificial intelligence) in place of manual marketing processes?

Note: This is a new question for the 2018 survey, so there is no trend data.
Optimisation of scheduling/frequency looks to have been identified by email marketers as a good starter use case, as a simpler proposition and something they are long accustomed to experimenting with. Among agency clients, predictive adaptation of frequency and scheduling has been fully implemented by more brands (16%) than either product selection (10%) or content (6%), despite having been investigated by a similar proportion of marketers (around two-thirds in all three cases). Emphasising its appeal as a first stop in the predictive analytics journey, a slightly higher proportion of company respondents have considered or implemented intelligent optimisation of frequency and scheduling than agency clients.

Agency respondents
Figure 39: In which of the following areas have your clients typically implemented predictive or intelligent solutions (including artificial intelligence) in place of manual marketing processes?

Note: This is a new question for the 2018 survey, so there is no trend data.
As with other areas of email marketing development, ensuring successful implementation of predictive analytics has evidently been more complex than some industry players claimed.

Currently, across all categories featured, no more than a third of email marketers have fully implemented – or partially implemented – predictive solutions for any of the use cases shown in Figure 38.

While restricted awareness of an emerging capability remains a natural barrier, reservations around ROI are also evident among those that have considered predictive and intelligent solutions (Figure 40). A third (33%) of agency respondents assert their clients are not convinced on performance uplift versus traditional methods. On the company side, particularly, the cost side of the equation is also a clear issue, with 37% citing implementation as too expensive / ROI is inconclusive.

Figure 40: Why have you (or your clients) not used any of the previous predictive or intelligent solutions?

Note: This is a new question for the 2018 survey, so there is no trend data. Respondents could select all the options that applied.
4.7.2. Innovating with email

Figure 41 shows the broad range of innovation opportunities on offer to email marketers, underscoring the ongoing possibilities for cutting-edge marketing that are still possible using what is now a well-established digital marketing channel and reliable ROI generator. While email marketing has dipped out of fashion on occasion in the past, it is by no means a cooked goose.

When asked about their innovation priorities for 2018, the collective response from email marketers has remained largely consistent with 2017, highlighting a mix of longer-standing and newer themes. *More creative uses of behavioural triggers and greater use of dynamic elements*, such as video content and GIFs, remain high on the agenda, marking email practitioners’ ongoing focus on reader engagement.

Automation is also a key innovation priority and sees the largest rise in focus from companies over the last year (53%, up from 45% in 2017). This tallies closely with the findings outlined in Section 4.6, showing that automation possibilities continue to hold strong appeal among email marketers but remain an uncracked nut, often necessitating further experimentation and development.

Mobile usage continues to be another key area of emphasis (and challenge). Nearly four in ten (39%) company respondents plan to innovate around optimisation of the mobile customer journey during 2018. Agencies (Figure 42) say their clients are less focused on this element but show rising interest in *delivering email content through messaging apps* (up from 16% to 23%), as a nod to the smartphone-driven proliferation of WhatsApp and its competitors, and opportunities around social commerce.

Company respondents

Figure 41: How do you intend to innovate with email in 2018?

![Innovating with email chart](chart_image)

<table>
<thead>
<tr>
<th>Innovation Area</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>More creative uses of behavioural triggers</td>
<td>52%</td>
<td>58%</td>
</tr>
<tr>
<td>Greater use of dynamic elements (video content, GIFs, countdown clocks etc.)</td>
<td>55%</td>
<td>52%</td>
</tr>
<tr>
<td>Using automation to enable one-to-one communication</td>
<td>45%</td>
<td>53%</td>
</tr>
<tr>
<td>Mobile-optimised customer journey (includes email and websites)</td>
<td>39%</td>
<td>38%</td>
</tr>
<tr>
<td>Use of artificial intelligence to improve performance</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>Using the email address as an identifier on external platforms</td>
<td>16%</td>
<td>20%</td>
</tr>
<tr>
<td>Delivering email content through messaging apps</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>Experimenting with different interfaces (smartwatches, IoT etc.)</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>None of the above</td>
<td>8%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Respondents 2018: 294
Respondents 2017: 548
Agency respondents
Figure 42: How do your clients intend to innovate with email in 2018?

- Using automation to enable one-to-one communication: 47% (2018) vs 42% (2017)
- Greater use of dynamic elements (video content, GIFs, countdown clocks etc.): 44% (2018) vs 42% (2017)
- Mobile-optimised customer journey (includes email and websites): 24% (2018) vs 28% (2017)
- Delivering email content through messaging apps: 23% (2018) vs 16% (2017)
- Using the email address as an identifier on external platforms: 20% (2018) vs 18% (2017)
- Experimenting with different interfaces (smartwatches, IoT etc.): 10% (2018) vs 9% (2017)
- None of the above: 14% (2018) vs 12% (2017)

Respondents 2018: 113
Respondents 2017: 202
The potential for artificial intelligence and machine learning to improve the efficiency and precision of email marketing — and marketing in general — continues to capture the attention of brands and agencies, with various use cases emerging and some even talking of a ‘rebirth’ of the channel, as possibilities around scaled personalisation of customer communications are finally unlocked.

Showing increased awareness and understanding, all use cases featured in Figure 43 are seen by more company respondents this year as having the potential to improve email marketing performance. Only 17% of in-company respondents and 21% of agencies plan to innovate with AI in 2018, however. This shows it may be some time yet before AI capabilities are widely assimilated by email marketers, accentuating the opportunities for early movers to differentiate themselves.

Among applications of AI (Figure 43), interest in optimisation of send times is evident, and consistent with the enthusiasm around this use case for predictive solutions seen earlier (Figure 38 and Figure 39). This is the most popular choice among company respondents for AI-based performance improvement, seeing support from nearly two-thirds (64%) of marketers.

Possibilities for content optimisation — another widely-cited use case for AI — are also prominent. Interest in improving subject line copy and optimising calls to action is significantly higher than in 2017, capturing the attention of around half of those surveyed, in the cases of both agency and brand respondents. Beyond these key content elements, positivity around opportunities to improve email copy in general has also risen strongly.

Company respondents

Figure 43: In what ways do you think that artificial intelligence could improve email marketing performance?

![Graph showing AI applications for email marketing performance improvement](https://business.linkedin.com/marketing-solutions/blog/b2b-beat/2017/its-not-mobile-first-its-becoming-mobile-only-says-iabs-randall-rothenberg)

Respondents 2018: 295
Respondents 2017: 547
Agency respondents

Figure 44: In what ways do you think that artificial intelligence could improve email marketing performance?

![Bar chart showing responses to the question: In what ways do you think that artificial intelligence could improve email marketing performance?]

**Voice of the expert: AI in email marketing**

“There are clear trends we are seeing in the industry that this research validates. Many marketers and agencies alike have a general lack of understanding of the fragmented machine learning (ML) and artificial intelligence (AI) offerings. Additionally, there is a general confusion as it pertains to an accurate definition of AI/ML and the delineation between what the machines can do and what the human must input and train.

“While interest and industry investment in this category is growing rapidly, the email industry still lags behind in its use. Based on the trends we see, it is clear from a macro perspective the industry is shifting to a more machine-driven automation, looking for solutions that will help create better, more unique and real-time user experiences that combine timing with content personalisation, yet need a configurable tool that is contextual to the brand and business. Product and content recommenders are not new to the industry, but we have found they require customisation and flexible controls as few out-of-the-box solutions can provide an immediate lift. Finding the best offering is the proverbial needle in the haystack.

“In the future, email marketers simply want easier tools to test. The promise of machine learning optimised email is getting closer, yet how to program, scale and still have marketer intuition driving the programme will be in conflict in change-averse organisations.”

**David Baker, Partner, RedPill Email**
Voice of the expert: AI in email marketing (cont.)

“Many consider AI as the future of email marketing, but that would be describing it as something that’s on its way. AI isn’t the future because it is already here. I’ve worked with several brands that have developed email strategies and incorporated AI to test improving their reach by optimising the subject line. In doing so, they have achieved outstanding results, in some cases delivering an ROI of five to one in the space of three months. The investment in some instances may appear to be a big step to take, but the rewards are even more significant!

“For brands that are innovative, aim to use email to develop customer relationships and want to provide value in their marketing, AI is the solution. I’m incredibly excited on how far email can go when AI is implemented because this is only the beginning. Brands that incorporate AI into the content of the email start to take email on a journey to being sophisticatedly machine-optimised at scale.”

Jenna Tiffany, Founder and Strategy Director, Let’s Talk Strategy
4.7.3. Email marketing focus

In terms of immediate priorities (Figure 45), the closely-linked areas of personalisation, segmentation and automation remain the ‘three kings’ of the current email marketing agenda, mirroring the results from the 2017 Email Census and the themes explored throughout this report. The ultimate goal of delivering relevant communications has risen up the list since 2017.

Strategy and campaign planning is again prominent, although some might be surprised that strategy development has not moved further up the priority list for more email marketers. All campaigns should be underpinned by a cohesive, long-term plan, but this remains a difficult area to master for many brands, requiring clear leadership and organisational unity across different departments.

Email marketing experts themselves see increased focus on campaign optimisation and testing, and data security, as encouraging (see Voice of the Expert box overleaf).

Company respondents

Figure 45: Which three areas of email marketing do you really need to focus on in 2018?

<table>
<thead>
<tr>
<th>Area</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personalisation</td>
<td>30%</td>
<td>25%</td>
</tr>
<tr>
<td>Segmentation</td>
<td>27%</td>
<td>25%</td>
</tr>
<tr>
<td>Automated campaigns</td>
<td>27%</td>
<td>25%</td>
</tr>
<tr>
<td>Strategy and campaign planning</td>
<td>33%</td>
<td>33%</td>
</tr>
<tr>
<td>Campaign optimisation and testing</td>
<td>22%</td>
<td>21%</td>
</tr>
<tr>
<td>Delivering relevant communications</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>Measurement and analytics</td>
<td>24%</td>
<td>20%</td>
</tr>
<tr>
<td>List / data quality</td>
<td>19%</td>
<td>17%</td>
</tr>
<tr>
<td>Lead nurturing</td>
<td>17%</td>
<td>16%</td>
</tr>
<tr>
<td>Behavioural response marketing</td>
<td>17%</td>
<td>16%</td>
</tr>
<tr>
<td>Data security</td>
<td>12%</td>
<td>9%</td>
</tr>
<tr>
<td>Dynamic content solutions</td>
<td>15%</td>
<td>10%</td>
</tr>
<tr>
<td>Design and copywriting</td>
<td>13%</td>
<td>10%</td>
</tr>
<tr>
<td>Social media integration</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Mobile-friendly emails</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>Deliverability</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Managing / effectively utilising ESP</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>SMS integration</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Specific device recognition</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Note: Respondents could select up to three options.

Respondents 2018: 296
Respondents 2017: 553
Voice of the expert: top areas of focus for 2018

“The fact that the first three (personalisation, segmentation and automation) are the three top areas of focus is not overly surprising and pretty much a repeat of last year. What is heartening to see is that testing and optimisation has risen through the ranks to become an area of focus. For far too long we email marketers have been viewing testing as a necessary evil [to the extent that] we didn’t have time nor resource for it, and so it often got swept under the mat as such.”

Kath Pay, Founder and Senior Consultant, Holistic Email Marketing

“It’s very encouraging to see the sharp rise of companies who will focus on data security this year (a jump from 3% to 12%). Perhaps led by GDPR, a renewed attention on data should serve to improve the effectiveness of email marketing campaigns and help enhance the reputation of the industry. For many brands, moving from a value-versus-volume approach may be a challenging transition, which can be eased by going back to basics and spending sufficient time and resources on the strategy and planning side of email marketing.”

Natalie Rockall, Founder, Eleven11 Digital

“While there are many exciting developments in the email space, from AI to sophisticated automation, the one remaining challenge remains the same: developing a strategic focus. Before leaping on to a new technology or testing personalisation, always start by defining the key goals, objectives and KPIs. It’s only by taking a strategic approach that a brand can identify if the new technology or technique has been successful for the brand or has been fit for purpose. Without doing this, there is a considerable risk of wasting time, resources and budget on small solutions that damage the email channel in the long term.

“It’s surprising to see that list/data quality isn’t a higher focus given the new GDPR legislation coming into force in May 2018. Brands that haven’t been adhering to email best practice may have to overcome the challenge of changing their email approach to comply, but also to put the consumer’s interest back at the heart of email.”

Jenna Tiffany, Founder and Strategy Director, Let’s Talk Strategy
Figure 46: Looking ahead five years, what do you think the single biggest change to email marketing will be?

Voice of the marketer: ‘Looking ahead five years, what do you think the single biggest change to email marketing will be?’

“AI, meaning a lot of decisions and campaign planning will become automated.”

“Brand distinction. While I saw a 23% increase in conversion using AI subject line testing, as the providers gained more clients we all began to sound alike. The increase was robust at first and began to flatline; lost momentum but not a downturn.”

“Customers will have more control over what is sent to them/customised.”

“Engagement. It will become ever more crucial to increase relevance in communications.”

“Enhanced HTML/CSS support across email clients, reducing development/testing time.”

“Far more automated and intelligent email marketing. Content will be pulled from existing sources and there will be less pressure on marketers to do it manually.”

“Focus will be on managing automated/predictive campaigns rather than building/planning.”

“GDPR and getting customers to opt into receiving emails based on their behaviour.”

“Integration of machine learning and predictive marketing into marketing automation platforms.”

“It will become almost a ‘luxury’ channel – customers’ email addresses will be reserved for highly relevant, highly personalised content and brands which fail to deliver will rarely get a second chance. It will be one of the channels with the highest and fastest growing ROI.”

“More automation across planning, execution and feedback – enabled by big data and AI being better able to identify appropriate triggers.”
Voice of the marketer: ‘Looking ahead five years, what do you think the single biggest change to email marketing will be?’ (cont.)

“Voice-based interaction. As people move away from using screens, emails copy needs to work equally well for someone reading it, or having it read to them.”

“Web-like experience within the email (shopping, purchasing, etc.) without the need to launch into a browser.”

“Automated generation of personal triggers and content based on AI.”

“Fully dynamic and personalised email communications based on behavioural, transactional and personal data – with no manual intervention.”

“The ability to stand out and build brand loyalty among this increasing volume of emails customers receive.”

“The rules around GDPR and how they’re handled will be crucial. A clean set of data to work from that is personalised and permission-based, will be the key to getting ahead.”

“With the need for opt-in and consent in Europe, I believe that we have to use AI to personalise all email campaigns almost on a one-to-one basis, to guarantee that we remain relevant for our potential customers.”
4.7.4. Data law changes

Data protection obligations remain a tricky area for email marketers to navigate, accentuated by the introduction of GDPR and associated sharpening of laws around consent, data portability and consumers’ ‘right to be forgotten’ and breach notification. There have been encouraging signs over brands’ readiness for GDPR, although with some evidence of ongoing confusion over its impact. Among company respondents, 77% indicated they would be compliant with GDPR (Figure 47). However, when agencies were asked about the impact of data law changes on their clients, a markedly lower proportion said they would be in a compliant position (66%).

Eyebrows might also be raised over the drop, seen in Figure 45, in the proportion of respondents citing list and data quality as an area of focus for 2018 (19%, down from 24% in 2017). Data cleanliness is an evidently important hygiene factor in the year of GDPR’s initiation, and as email marketers pursue improvement initiatives that rely heavily on the quality of the customer information they hold.

Encouraging, however, is an increased focus on data security, no doubt fuelled by the GDPR changes and numerous recent high-profile cases of database breaches. Among company respondents, 12% plan to focus on this area in 2018, up from just 3% in 2017 (Figure 45).

**Voice of the expert: GDPR**

“The GDPR clearly presents challenges to effective marketing across many channels, but there is an opportunity too. By placing the customer at the heart of your business, you can ensure consumers receive the timely and relevant communications they crave. In doing this, marketers will be able to go beyond simply adhering to the new rules and engage customers in an honest and transparent way. Enabling them to foster long-term relationships and increased loyalty, creating an environment where both the business and customer can benefit. If email is to continue to grow and thrive as a channel, then marketers must be ready and able to succeed in building long-term relationships with customers that are based on transparency and trust.”

Rachel Aldighieri, Managing Director, DMA
Figure 47: By May 25, 2018 (the GDPR deadline), to what extent will recent EU data law changes have impacted your (or your clients’) approach to email?

![Bar chart showing the impact of GDPR on approach to email]

- **Company respondents**: 297
- **Agency respondents**: 114
4.7.5. Use of animated or interactive modules

Beyond data-led initiatives, it remains notable that opportunities remain for email marketers to improve reader engagement by increasing the appeal of their content. There evidently remains scope for brands to invest in creative resources, as opposed to the science parts that receive most attention.

*Figure 48* shows a significant proportion of company respondents (39%) now integrating animated GIFs within their emails, and this rises to 48% among agency clients (*Figure 49*). *Simple CSS interactions* and *emails based around interactivity*, such as those with basket and checkout functionality embedded within the message, are also in relatively common use. In the latter case, nearly half (46%) of company respondents and more than six in ten (62%) agency respondents say they (or their clients) have used these, or are planning to.

Company respondents

*Figure 48: Is your company using (or planning to use) any of the following animated or interactive modules in its emails?*

![Bar chart showing usage of animated GIFs, simple CSS interactions, emails based around interactivity, and mobile-only animations or interactivity.]

- **Animated GIFs:**
  - Do this: 43%
  - Planning this: 18%
  - Don't do this: 39%

- **Simple CSS interactions (e.g., hover states on buttons):**
  - Do this: 58%
  - Planning this: 19%
  - Don't do this: 23%

- **Emails based around interactivity (e.g., basket or checkout in email, full animation or similar):**
  - Do this: 54%
  - Planning this: 28%
  - Don't do this: 18%

- **Mobile-only animations or interactivity (e.g., menu drop downs, animated logos):**
  - Do this: 80%
  - Planning this: 12%
  - Don't do this: 8%

*Note: This is a new question for the 2018 survey, so there is no trend data.*
Agency respondents

Figure 49: Are your clients using (or planning to use) any of the following animated or interactive modules in their emails?

- Animated GIFs: 33% (We do this), 19% (Planning this), 48% (We don’t do this)
- Simple CSS interactions (e.g., hover states on buttons): 41% (We do this), 22% (Planning this), 37% (We don’t do this)
- Emails based around interactivity (basket or checkout in email, full animation or similar): 38% (We do this), 33% (Planning this), 29% (We don’t do this)
- Mobile-only animations or interactivity (e.g., menu drop downs, animated logos): 58% (We do this), 23% (Planning this), 19% (We don’t do this)

Note: This is a new question for the 2018 survey, so there is no trend data.

Voice of the expert: animation

“It’s great to see many brands using more engaging email tactics such as animation. When I start working with brands on strategy I often find that some of these tactics are being used without any split testing of the value.

“Are you making sure tactics are tested to allow them to be refined? What type of animations work best? How does the animation support the email message to aid conversion rather than just add frivolity?”

Tim Watson, Email Consultant, Zettasphere
5. Appendix

5.1. Respondent profiles

Figure 50: Which of the following best describes your company or role?

- Client-side (part of an in-house team) - 32%
- Agency / vendor / consultant - 68%

Respondents: 704
Figure 51: In which country/region are you (personally) based?

Respondents: 679

Figure 52: What best describes your job role?

Respondents: 648
Company respondents
Figure 53: Are you more focused on B2B or B2C marketing?

- B2C marketing: 47%
- B2B marketing: 34%
- B2B and B2C (equally): 19%

Company respondents
Figure 54: In which business sector is your organisation?

- Retail / Mail Order (including online retail): 18%
- Technology: 9%
- Financial Services & Insurance: 9%
- Travel & Hospitality: 9%
- Professional Services (e.g. consulting): 6%
- Charities & Non-profit: 6%
- Print / Publishing: 6%
- Education: 6%
- Consumer Goods: 5%
- Healthcare & Pharmaceuticals: 5%
- Media: 4%
- Manufacturing & Engineering: 3%
- Telecoms: 2%
- Automotive: 1%
- Government: 1%
- Other: 10%

Respondents: 457
Agency respondents

Figure 55: What type of company do you work for?

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital agency</td>
<td>34%</td>
</tr>
<tr>
<td>Full-service agency</td>
<td>24%</td>
</tr>
<tr>
<td>Consultant</td>
<td>20%</td>
</tr>
<tr>
<td>Other marketing technology vendor</td>
<td>7%</td>
</tr>
<tr>
<td>Email vendor</td>
<td>6%</td>
</tr>
<tr>
<td>Specialist email agency</td>
<td>4%</td>
</tr>
<tr>
<td>Other</td>
<td>5%</td>
</tr>
</tbody>
</table>

Respondents: 202

Figure 56: What is your annual company revenue?

<table>
<thead>
<tr>
<th>Revenue Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;£1 million</td>
<td>17%</td>
</tr>
<tr>
<td>£1 – £10 million</td>
<td>35%</td>
</tr>
<tr>
<td>£10 – £50 million</td>
<td>19%</td>
</tr>
<tr>
<td>£50 – £150 million</td>
<td>9%</td>
</tr>
<tr>
<td>£150 million – £1 billion</td>
<td>9%</td>
</tr>
<tr>
<td>More than £1 billion</td>
<td>11%</td>
</tr>
</tbody>
</table>

Respondents: 410
5.2. Additional data

5.2.1. Email effectiveness

Agency respondents

Figure 57: How do you rate the performance of your clients’ email campaigns?

<table>
<thead>
<tr>
<th>Performance Level</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excellent</td>
<td>4%</td>
<td>6%</td>
<td>8%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Good</td>
<td>32%</td>
<td>41%</td>
<td>42%</td>
<td>44%</td>
<td>45%</td>
</tr>
<tr>
<td>Average</td>
<td>38%</td>
<td>40%</td>
<td>40%</td>
<td>40%</td>
<td>42%</td>
</tr>
<tr>
<td>Poor</td>
<td>12%</td>
<td>6%</td>
<td>8%</td>
<td>9%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Respondents 2018: 192 | 2017: 329
Agency respondents
Figure 58: How do your clients typically rate the following channels or disciplines in terms of return on investment?

<table>
<thead>
<tr>
<th>Channel</th>
<th>Excellent</th>
<th>Good</th>
<th>Average</th>
<th>Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email marketing</td>
<td>37%</td>
<td>42%</td>
<td>15%</td>
<td>6%</td>
</tr>
<tr>
<td>Paid search (PPC)</td>
<td>18%</td>
<td>47%</td>
<td>26%</td>
<td>9%</td>
</tr>
<tr>
<td>SEO (organic search)</td>
<td>18%</td>
<td>50%</td>
<td>27%</td>
<td>5%</td>
</tr>
<tr>
<td>Content marketing</td>
<td>14%</td>
<td>55%</td>
<td>23%</td>
<td>8%</td>
</tr>
<tr>
<td>Mobile marketing</td>
<td>9%</td>
<td>41%</td>
<td>38%</td>
<td>12%</td>
</tr>
<tr>
<td>Social media</td>
<td>9%</td>
<td>27%</td>
<td>42%</td>
<td>22%</td>
</tr>
<tr>
<td>Affiliate marketing</td>
<td>6%</td>
<td>31%</td>
<td>47%</td>
<td>16%</td>
</tr>
<tr>
<td>Online display advertising</td>
<td>5%</td>
<td>23%</td>
<td>46%</td>
<td>26%</td>
</tr>
<tr>
<td>Offline direct marketing</td>
<td>4%</td>
<td>32%</td>
<td>46%</td>
<td>18%</td>
</tr>
</tbody>
</table>

Respondents: 166
Agency respondents – change since 2017
Figure 59: Proportion of agency respondents saying their clients rate channels or disciplines as ‘excellent’ or ‘good’ for ROI

<table>
<thead>
<tr>
<th>Channel</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email marketing</td>
<td>76%</td>
<td>79%</td>
</tr>
<tr>
<td>Content marketing</td>
<td>67%</td>
<td>69%</td>
</tr>
<tr>
<td>SEO (organic search)</td>
<td>68%</td>
<td>74%</td>
</tr>
<tr>
<td>Paid search (PPC)</td>
<td>64%</td>
<td>68%</td>
</tr>
<tr>
<td>Mobile marketing</td>
<td>50%</td>
<td>47%</td>
</tr>
<tr>
<td>Affiliate marketing</td>
<td>36%</td>
<td>37%</td>
</tr>
<tr>
<td>Social media</td>
<td>43%</td>
<td>36%</td>
</tr>
<tr>
<td>Offline direct marketing</td>
<td>33%</td>
<td>36%</td>
</tr>
<tr>
<td>Online display advertising</td>
<td>28%</td>
<td>41%</td>
</tr>
</tbody>
</table>

Respondents 2018: 166
Respondents 2017: 288
Agency respondents

Figure 60: Approximately what proportion of your clients’ total sales can they attribute to the email marketing channel?

<table>
<thead>
<tr>
<th>Proportion</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-10%</td>
<td>26%</td>
<td>23%</td>
<td>22%</td>
</tr>
<tr>
<td>11-20%</td>
<td>34%</td>
<td>31%</td>
<td>29%</td>
</tr>
<tr>
<td>21-30%</td>
<td>23%</td>
<td>21%</td>
<td>18%</td>
</tr>
<tr>
<td>31-40%</td>
<td>15%</td>
<td>7%</td>
<td>9%</td>
</tr>
<tr>
<td>41-50%</td>
<td>6%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>51-60%</td>
<td>6%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>61-70%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>71-80%</td>
<td>3%</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>81-90%</td>
<td>3%</td>
<td>3%</td>
<td>0%</td>
</tr>
<tr>
<td>91-100%</td>
<td>3%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Respondents 2018: 161
2017: 284 | 2016: 277
5.2.2. **Email budgets**

Company respondents

Figure 61: What proportion of your total marketing budget does email marketing account for?

![Email budget chart]

Respondents 2018: 382

2017: 662 | 2016: 595
Agency respondents

Figure 62: What proportion of your clients’ total marketing budget does email marketing account for?

<table>
<thead>
<tr>
<th>Proportion</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-10%</td>
<td>38%</td>
<td>36%</td>
<td>44%</td>
</tr>
<tr>
<td>11-20%</td>
<td>35%</td>
<td>23%</td>
<td>29%</td>
</tr>
<tr>
<td>21-30%</td>
<td>14%</td>
<td>13%</td>
<td>17%</td>
</tr>
<tr>
<td>31-40%</td>
<td>7%</td>
<td>6%</td>
<td>9%</td>
</tr>
<tr>
<td>41-50%</td>
<td>4%</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>51-60%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>61-70%</td>
<td>2%</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>71-80%</td>
<td>2%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>81-90%</td>
<td>0%</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td>91-100%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Respondents 2018: 157
2017: 277  | 2016: 276
5.2.3. Mobile

Agency respondents

Figure 63: How would you describe the extent to which your clients have a strategy for optimising email marketing for different devices?

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Very advanced</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quite advanced</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Moderate</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Basic</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-existent</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Respondents 2018: 141 | 2017: 252
Agency respondents

Figure 64: What have your clients done to optimise email marketing for different devices?

Note: Respondents could select all the options that applied.
5.2.4. Future of email

Agency respondents

Figure 65: Which three areas of email marketing do your clients really need to focus on in 2018?

- Strategy and campaign planning: 28% (2018), 28% (2017)
- Personalisation: 25% (2018), 25% (2017)
- Segmentation: 23% (2018), 23% (2017)
- Measurement and analytics: 17% (2018), 23% (2017)
- Behavioural response marketing: 28% (2018), 21% (2017)
- Delivering relevant communications: 19% (2018), 21% (2017)
- Dynamic content solutions: 11% (2018), 17% (2017)
- Campaign optimisation and testing: 16% (2018), 17% (2017)
- Automated campaigns: 14% (2018), 20% (2017)
- Design and copywriting: 12% (2018), 10% (2017)
- Social media integration: 13% (2018), 10% (2017)
- Data security: 8% (2018), 7% (2017)
- Deliverability: 9% (2018), 6% (2017)
- Managing / effectively utilising ESP: 4% (2018), 4% (2017)
- SMS integration: 4% (2018), 2% (2017)
- Specific device recognition: 3% (2018), 1% (2017)

Note: Respondents could select up to three options.