

 DEMAND METRIC

PRESENTS:

THE STATE OF

# EMAIL MARKETING

2019

AN INDUSTRY BENCHMARK REPORT

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What separates high-performing email marketers from the rest of the pack?

# THE STATE OF EMAIL MARKETING

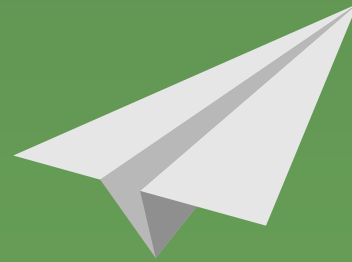
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## Introduction



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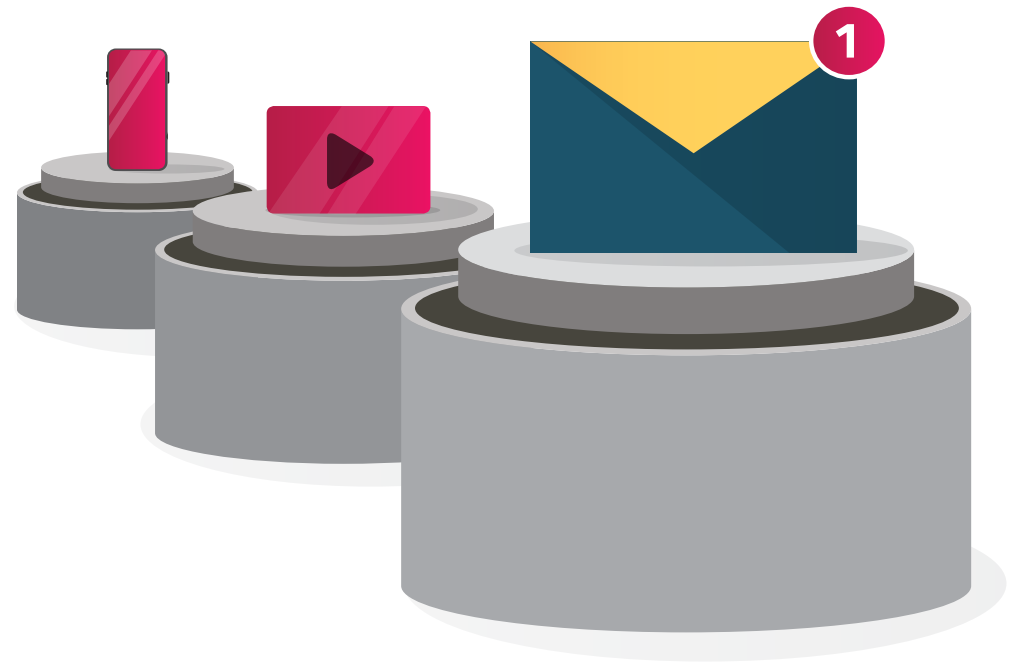
## Introduction

**Email remains one of the most important marketing channels.** Recent Demand Metric studies confirm that it is one of the most-used channels, and that it ranks high on the list of best ways to reach certain groups, such as sales and marketing and technical audiences. Significant variance, however, exists in the results marketers get from using email.

Demand Metric and Return Path by Validity continue to partner to understand which email tactics marketers are using, how well they are working, and what challenges prevent greater success with email.

The most recent edition of this research continues to pursue answers to the key question:

**What separates high-performing email marketers from the rest of the pack?**



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## Executive Summary



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## Executive Summary

This report shares the results of the 2019 research study, providing insights and data useful for benchmarking, planning, and improving email marketing effectiveness.

### Some of the key findings from this study include:



The top email marketing objectives are communicating with customers (74 percent), building brand awareness (64 percent), and communicating with prospects (63 percent).



Over one-third of study participants (37 percent) report that email marketing effectiveness is increasing, down from 44 percent in 2018.



Firms that report increasing email marketing effectiveness are more likely to also report annual revenue growth.



The biggest email marketing challenge is competition for attention in the inbox (45 percent).

For more detail on the survey and the participants that contributed to the research, please refer to the [Appendix](#).



Email deliverability ranked third on the list of challenges and saw a 12 percent increase compared to the 2018 study.



Email personalization was the top email marketing tactic in use (72 percent), a slight increase from the 2018 study.



One-third of study participants have no formal subject-line optimization process.

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## Email Marketing Objectives



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## Email Marketing Objectives

The objectives in place for email marketing show subtle changes from 2018 to 2019, as **Figure 1** summarizes.

The top three objectives are unchanged from last year, but in a different rank order:

- **Communicate with customers**
- **Build brand awareness**
- **Communicate with prospects**

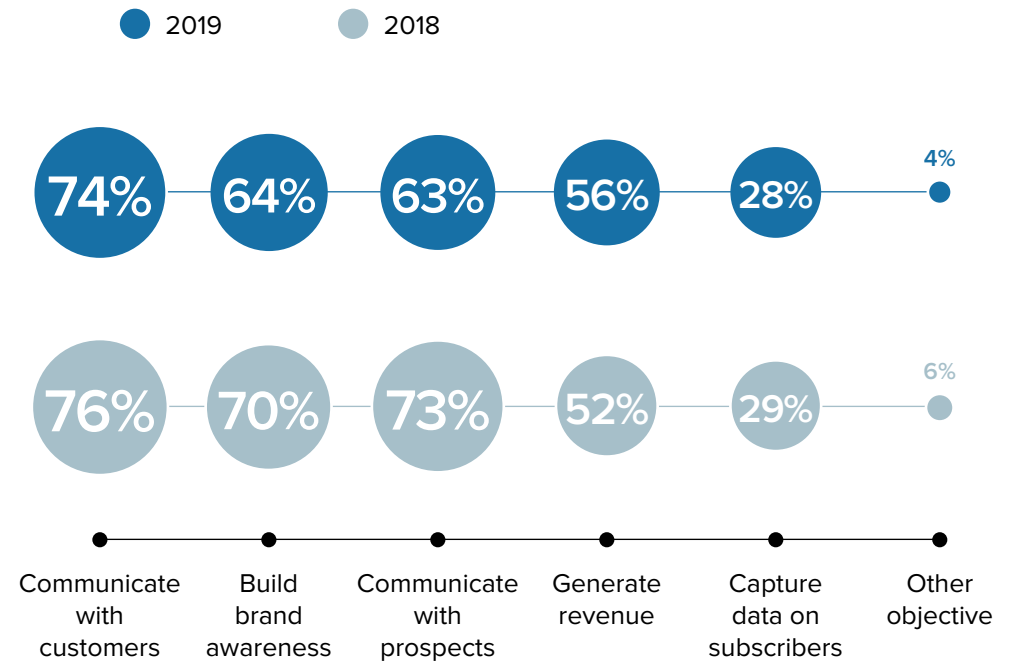
These top objectives parallel the overall marketing mission. The 2019 results don't show a significant shift in objectives, but perhaps **reflect a more pragmatic orientation through the increase in the revenue generation objective.**



**FIGURE 1**

### Email Marketing Objectives

Communicating with customers, prospects, and building brand awareness are the top email marketing objectives.



Segmenting the email objective data from Figure 1 allows some differences to emerge based on organization type, which **Figure 2** shows.

**B2C organizations list revenue generation as the top objective, while B2B firms place communicating with customers at the top of the list.**

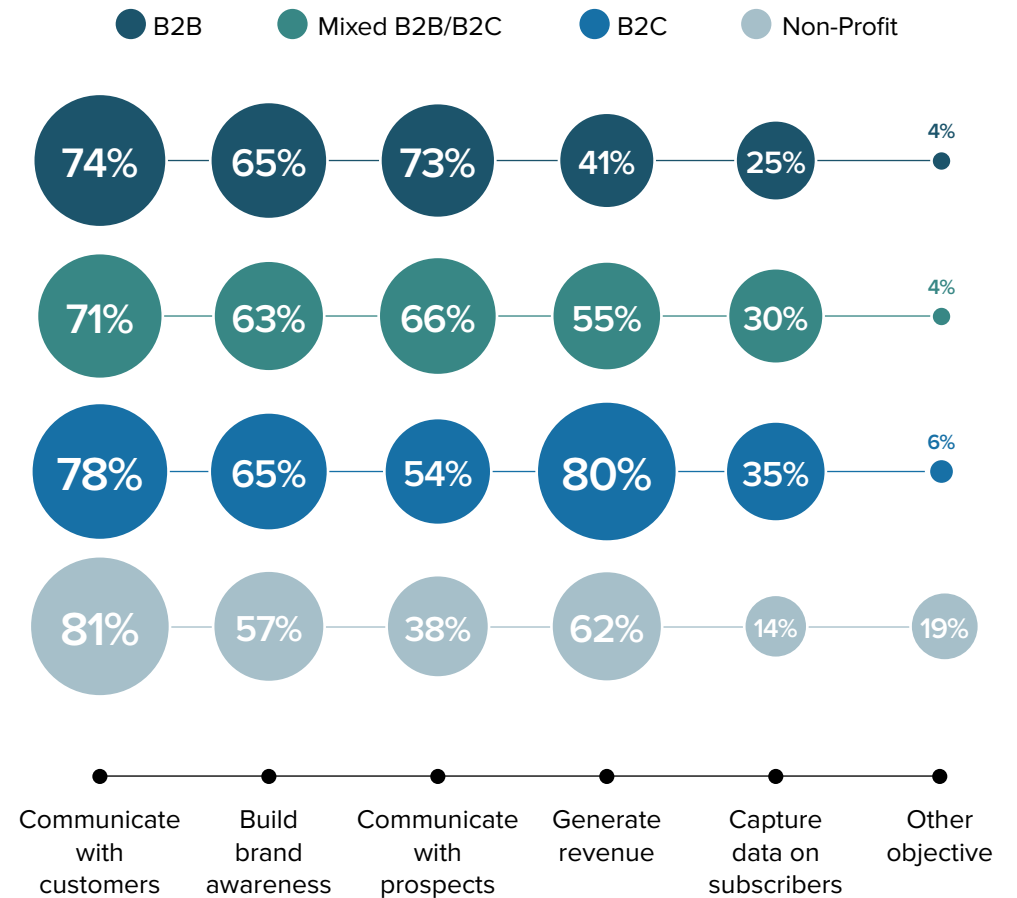
Non-profits had the highest percentage of the “Other objective” response option, and write-in comments indicate that these objectives include donations, member engagement, retention, and advocacy.



**FIGURE 2**

**Email Marketing Objectives by Organization Type**

The order of priorities for email marketing changes based on an organization’s focus.



**Experienced marketers understand that ensuring email effectiveness requires constant vigilance and maintenance.** Many, dynamic factors influence email marketing success.

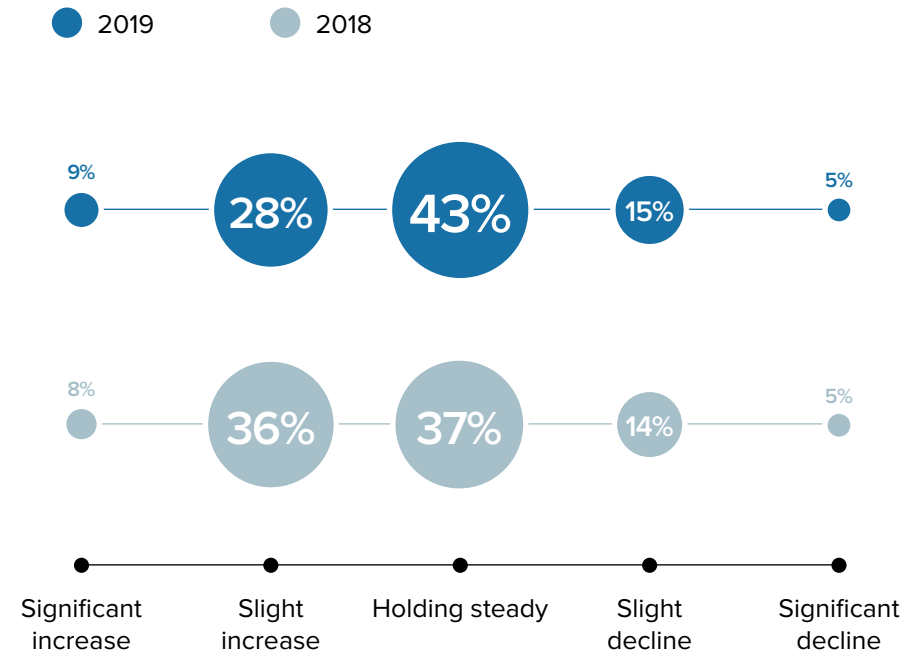
The implication is that rarely is its effectiveness holding steady: for most marketers it is either improving or declining. Study participants share in **Figure 3** how they rate the effectiveness of email as a marketing channel.

The effectiveness of email as a marketing channel did not show improvement year-to-year in this study. This lack of increased effectiveness, however, did not apply equally to all study participants.



**FIGURE 3**  
**Email Marketing Effectiveness**

Fewer participants in the 2019 study report in increase in email effectiveness.



This email marketing effectiveness data lets us segment objectives by effectiveness. This segmentation was presented in the 2018 report, and **Figure 4** presents it using the 2019 data.

In all cases, a much higher percentage of organizations that report increasing email effectiveness cite having the email objectives listed in Figure 1.

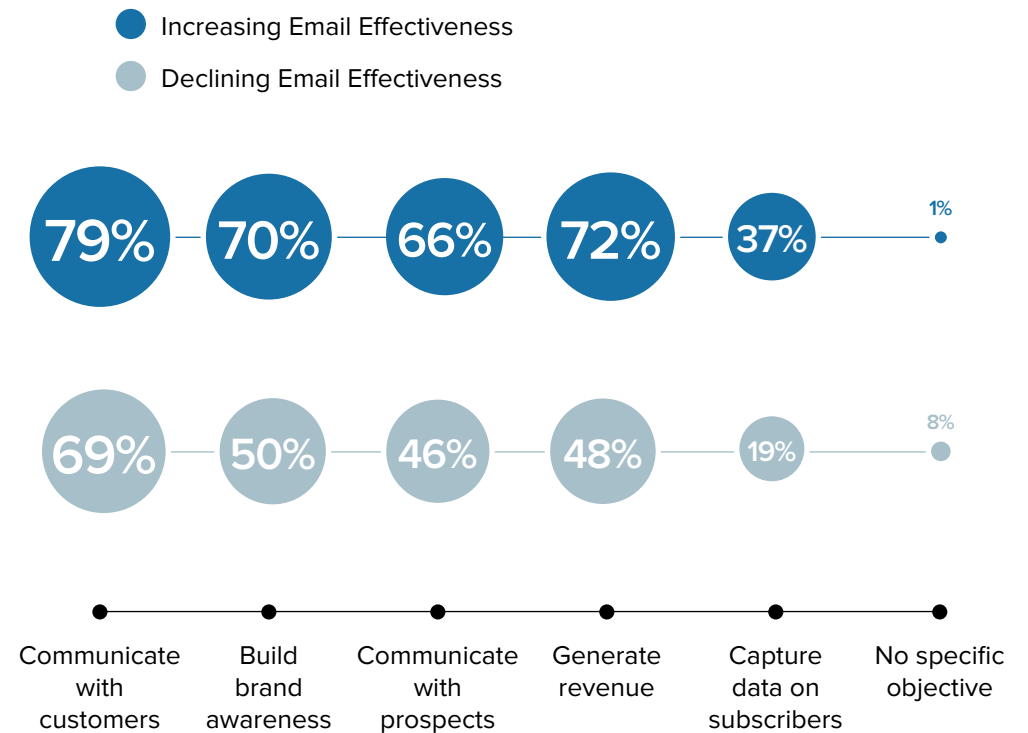
In fact, the difference between the effectiveness segments for these email objectives averages **18 percent, with the greatest delta resulting from the “Generate revenue” email objective.**

In the 2018 study, the average difference between these segments was only 10 percent. This study did not look for the reasons why firms that report increasing email effectiveness have loftier objectives for email than those that report declining effectiveness.

But we can speculate; **where email effectiveness is on the rise, it’s likely the result of an investment in time, tools, or acquiring skills to use email effectively.**

**FIGURE 4**  
**Email Marketing Objectives and Effectiveness**

Those who are having success with email have more objectives for its use.



When analyzing this email effectiveness data, an interesting relationship came to light between revenue growth and email effectiveness.

Study participants were asked to characterize their organization’s revenue growth during the most recently completed fiscal year, using the following categories:

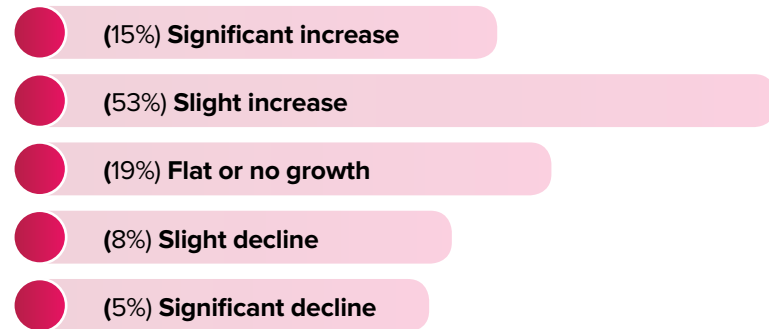


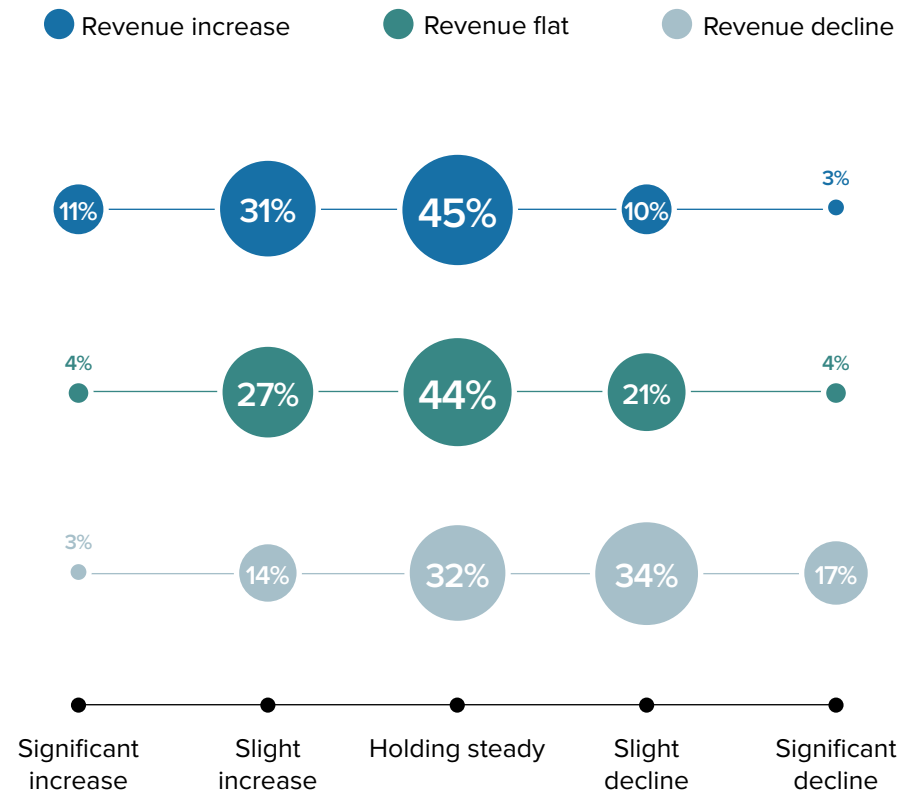
Figure 5 displays this relationship between revenue growth and email marketing effectiveness.

There are certain cautions to note when looking at correlations in data. Statisticians and marketing research analysts are always quick to point out that “correlation is not causation” and that adage applies here. It is an oversimplification to imply that investing to increase email marketing effectiveness guarantees revenue growth.

Managing an effective email marketing program isn’t a guaranteed cure for all revenue ills, but this data shows it clearly can serve as a component in driving growth. **This relationship between email marketing effectiveness and revenue growth should cause marketers to sit up and take notice.** Their efforts to curate an effective email marketing program can play a key role in driving revenue growth.

**FIGURE 5**  
Email Marketing Effectiveness and Revenue Growth

Revenue growth in the past year is related to increased email marketing effectiveness.



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## Email Marketing Challenges



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# Email Marketing Challenges

The study inventoried the challenges of marketing through the email channel, as **Figure 6** summarizes.

**FIGURE 6**  
**Email Marketing Challenges**

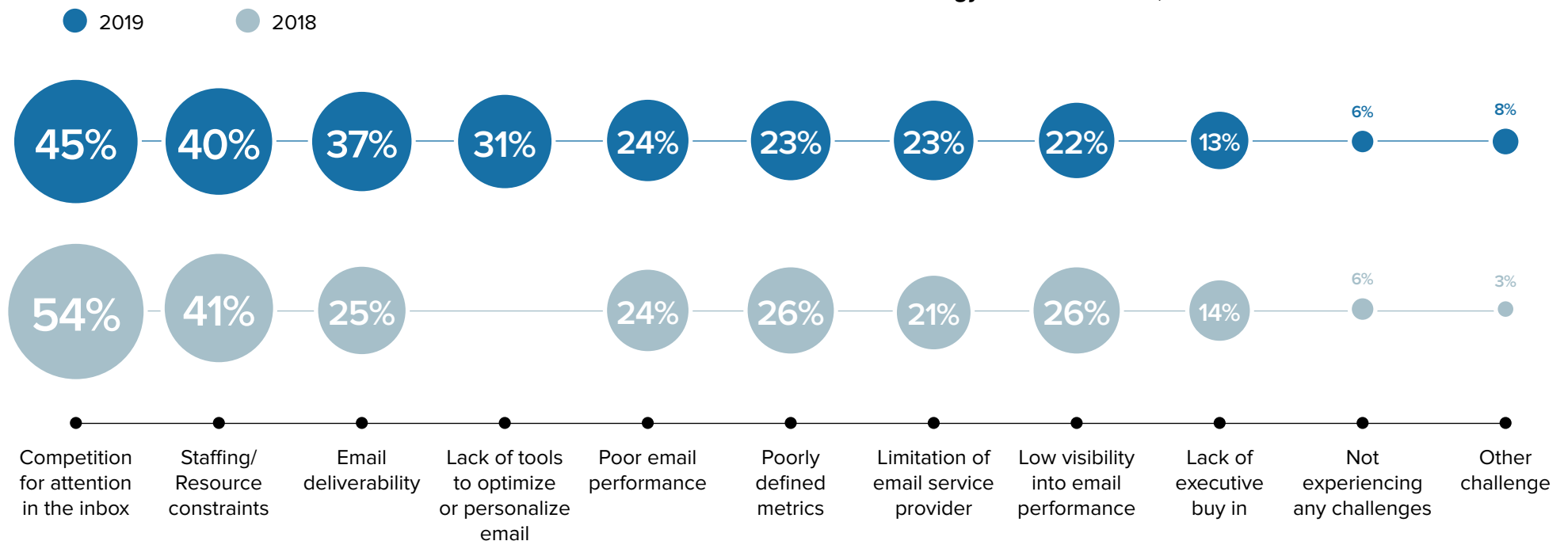
Competing for attention in the inbox remains the top email marketing challenge.

**The top challenge for 2019 remains the same, although at a lower severity than in 2018.** Deliverability, however, has surged as a problem, up 12 percent year-over-year.

A new challenge appears as a response option in the 2019 survey: “Lack of tools to optimize or personalize email,” and it ranks fourth in the 2019 list of challenges.

The “Other challenge” response option elicited some insightful write-in comments, which we summarize here:

- **Lack of engagement, list growth, data quality, email copywriting, technology stack limitations, internal silos.**



While some debate may exist about the quality of open rate as a metric, the reality is that no other actions can occur that matter to email marketers unless emails are opened.

**Figure 7** compares open rates from the 2018 study with 2019 study data.

The greatest change in the 2019 study comes in the middle of the range shown in **Figure 7**. In 2018, 39 percent of participants reported open rates between 11 and 20 percent.

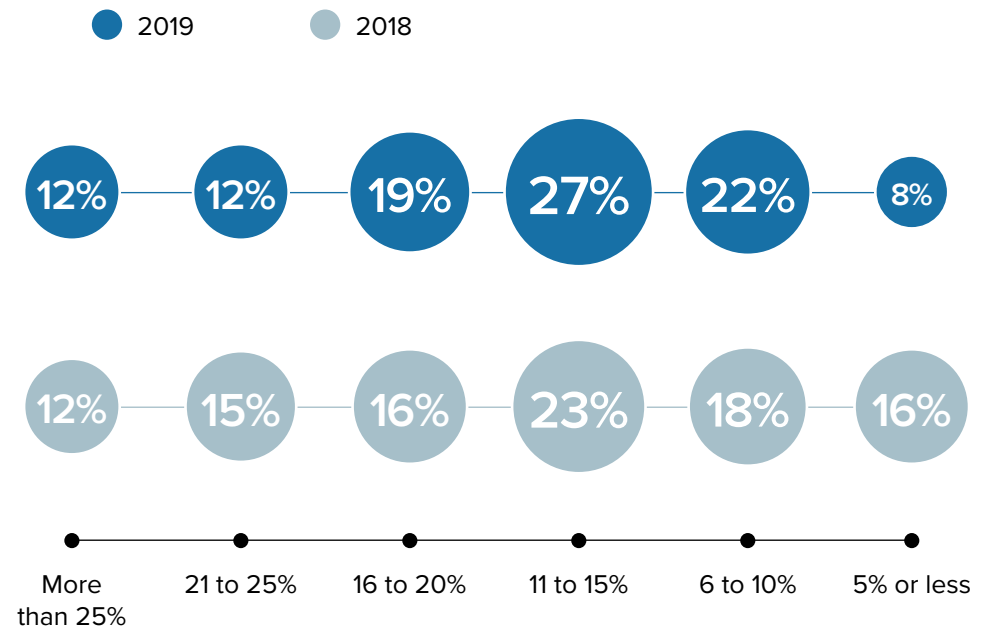
In 2019 that figure is 46 percent, and the increase comes from both ends of the range: **fewer participants reported open rates of 5 percent or less, and fewer also reported open rates of more than 21 percent.**



**FIGURE 7**

**Average Email Open Rates for Bulk Sends**

The average email open rate for the 2019 study skews higher than in 2018.





Open rates correlate to email marketing effectiveness, and **Figure 8** shows how strong the relationship is between reported effectiveness and open rates.

The relationship between open rates and email marketing effectiveness is intuitive, and **Figure 8** shows exactly what logic suggests we should see. Seeing the actual comparison numbers, however, is impactful.

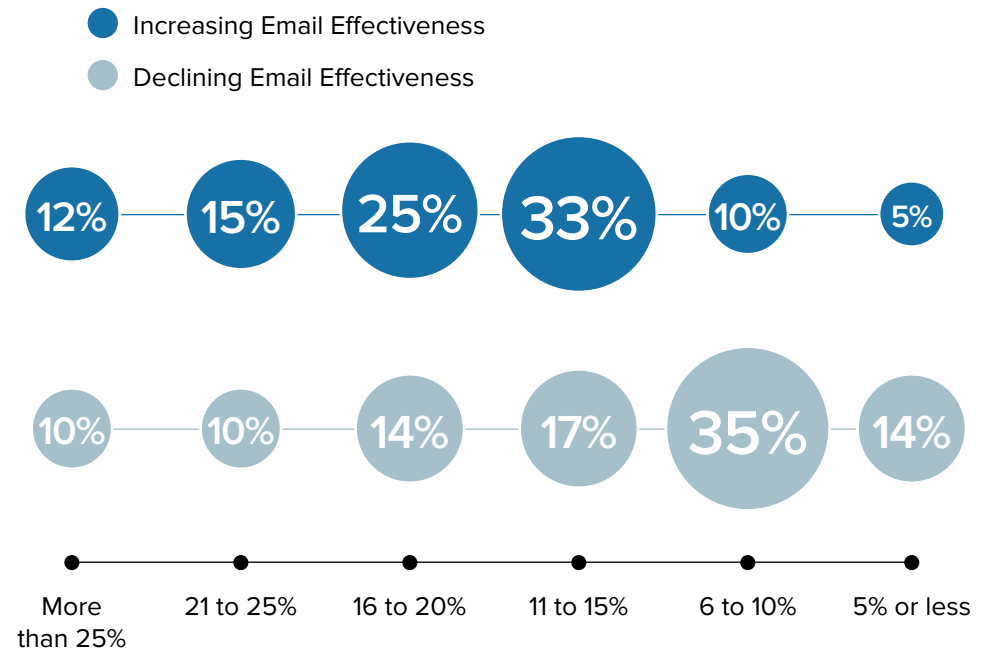
Over half of participants whose email marketing effectiveness is increasing enjoy open rates of 16 percent or more. Barely one-third of those whose email marketing effectiveness is decreasing report the same open rates.

**Investing to increase email marketing effectiveness will pay dividends in higher open rates.**



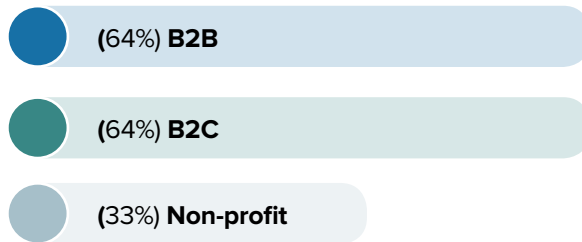
**FIGURE 8**  
**Average Open Rates & Email Effectiveness**

Study participants that report greater email marketing effectiveness also report higher open rates.



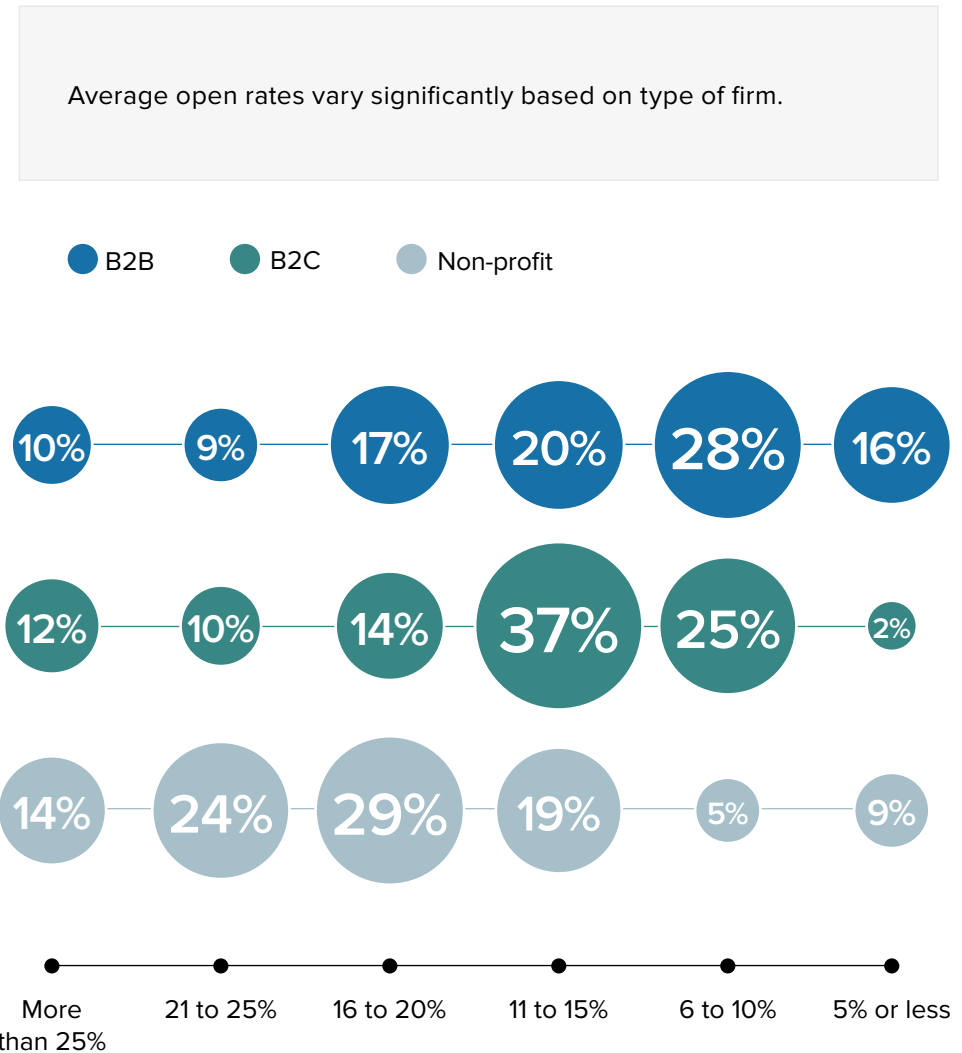
Open rates showed a correlation to the type of firm that was using email for marketing. **Figure 9** shows this relationship.

B2B and B2C firms have a greater struggle with open rates than do the Non-profit organizations in the study. Using an average open rate of 15 percent or less, the differences are evident:



It was outside the scope of this study to explore why non-profit organizations enjoy higher open rates. What is clear is that B2B organizations see the lowest percentage of their bulk email sends opened.

**FIGURE 9**  
Average Open Rates by Type of Firm



The objective of an email send may influence the open rate for those sends. The data about open rates and email marketing objectives results in the graph shown in **Figure 10**.

**Figure 10** should encourage marketers to employ less subtlety in crafting their marketing email messages.

**This study's data shows that when generating revenue is one of the objectives for email marketing, the average open rates are better.**

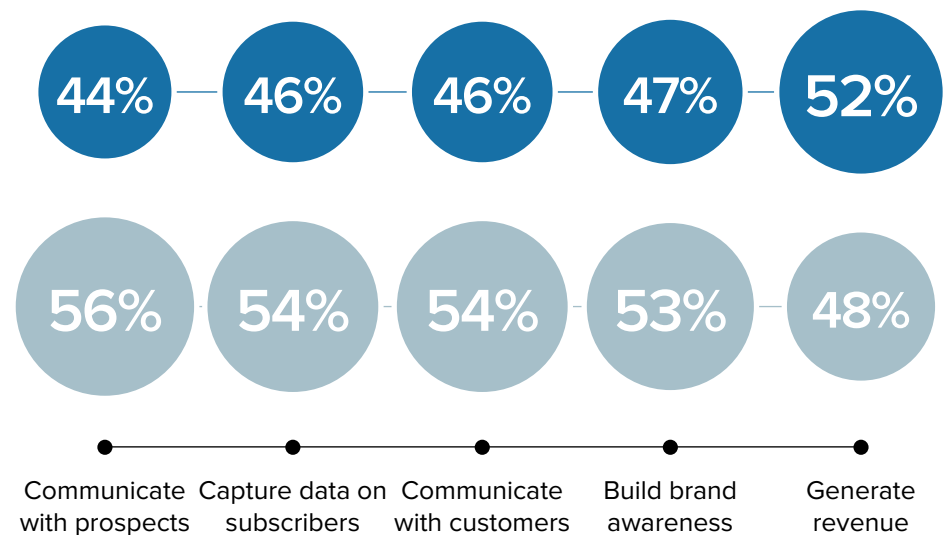
When the objective is communicating with prospects, average open rates are the worst. While just speculation, the absence of a relationship between sender and receiver may underpin the reason for the latter.



**FIGURE 10**  
**Average Open Rates and Objectives**

When one of the email marketing objectives is generating revenue, open rates are better.

- Open rates 16% or more
- Open rates 15% or less



As was the case in 2018, staffing and resource constraints pose a challenge to email marketing success. **Figure 11** shows a summary of the resources study participants use to support their email marketing efforts.

**Firms in the 2019 study showed a marked increase in using outside resources and expertise, either through outsourcing or through blending resources with in-house email marketing efforts.**

The resource mix for email marketing showed some major differences based on the B2B or B2C orientation of the firm:

- B2B firms:** 75% in-house only; 24% both in-house & outsourced
- B2C firms:** 48% in-house only; 50% both in-house & outsourced

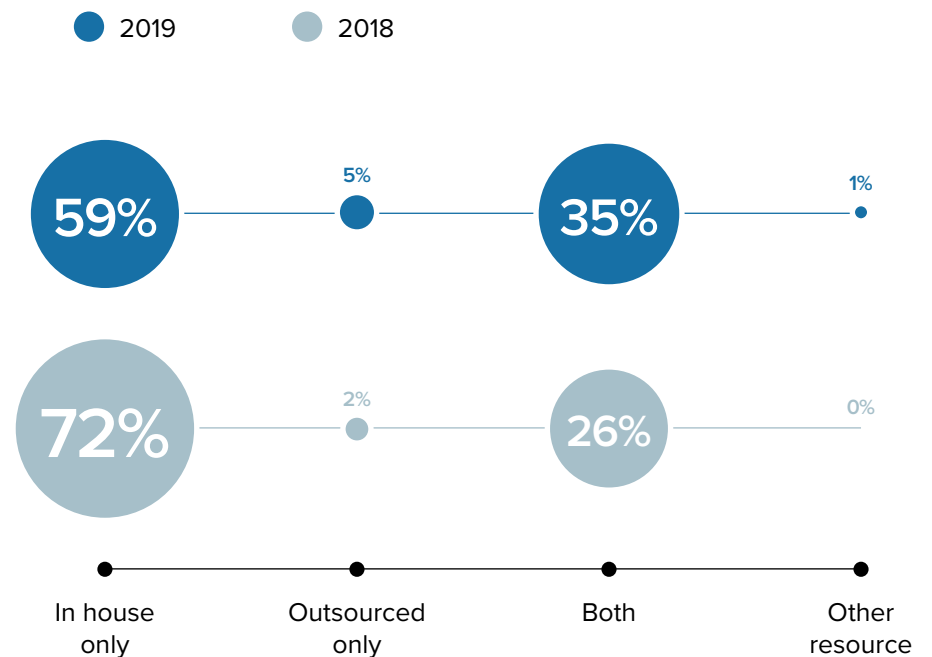
B2C firms are more willing to invest in outside resources to help with their email marketing efforts.

Looking at the use of resources from Figure 9, using the average open rates in Figure 7 revealed no significant difference in which resources were in use. **In other words, lower open rates were not associated with heavier reliance on one type of resource over another.**

The resource use mix was virtually identical for open rates of 15 percent and below, and for 16 percent and above. Clearly, concerning open rates, other disciplines and best practices come into play.

**FIGURE 11**  
**Email Marketing Resources in Use**

There's a greater tendency to use outside resources to support email marketing efforts in 2019.



Third on the list of challenges in this year's study was email deliverability. Over one-third of the study participants have this challenge, compared to just one-fourth in 2018.

**A way that some organizations attempt to address this challenge is by changing their email service provider (ESP) or adding a new, dedicated IP address. Figure 12 shows the frequency that study participants resorted to this remedy.**

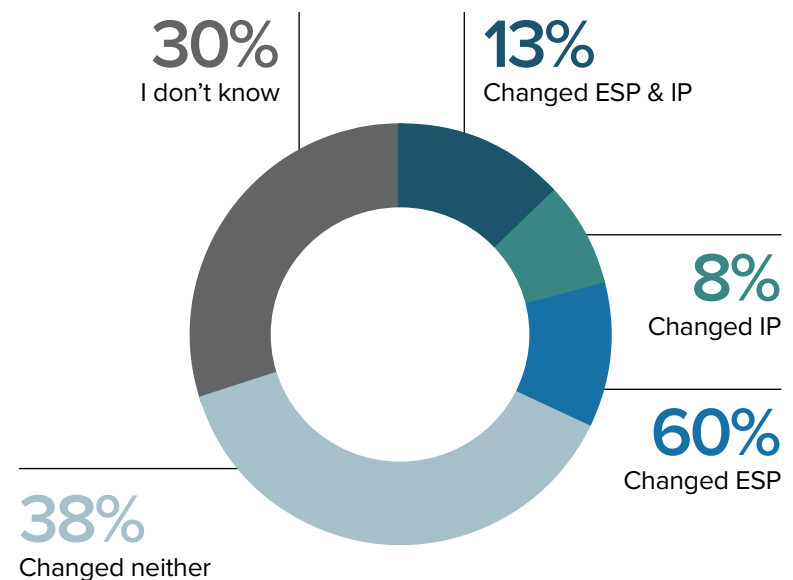
In the 2018 study, the survey simply asked participants a "yes" or "no" question about making a change to their ESP or IP. The 2019 survey made this question more granular to identify the specific type of change.

A comparison is still possible: in 2018, 57 percent changed neither, 24 percent made one or both changes, and 19 percent didn't know.

The increase in the email deliverability challenge in this year's study corresponds to an increase in making ESP, IP, or both changes in an effort to deal with this challenge.

**FIGURE 12**  
**Changes to ESP or IP**

Almost one-third of the firms in the study made a change.

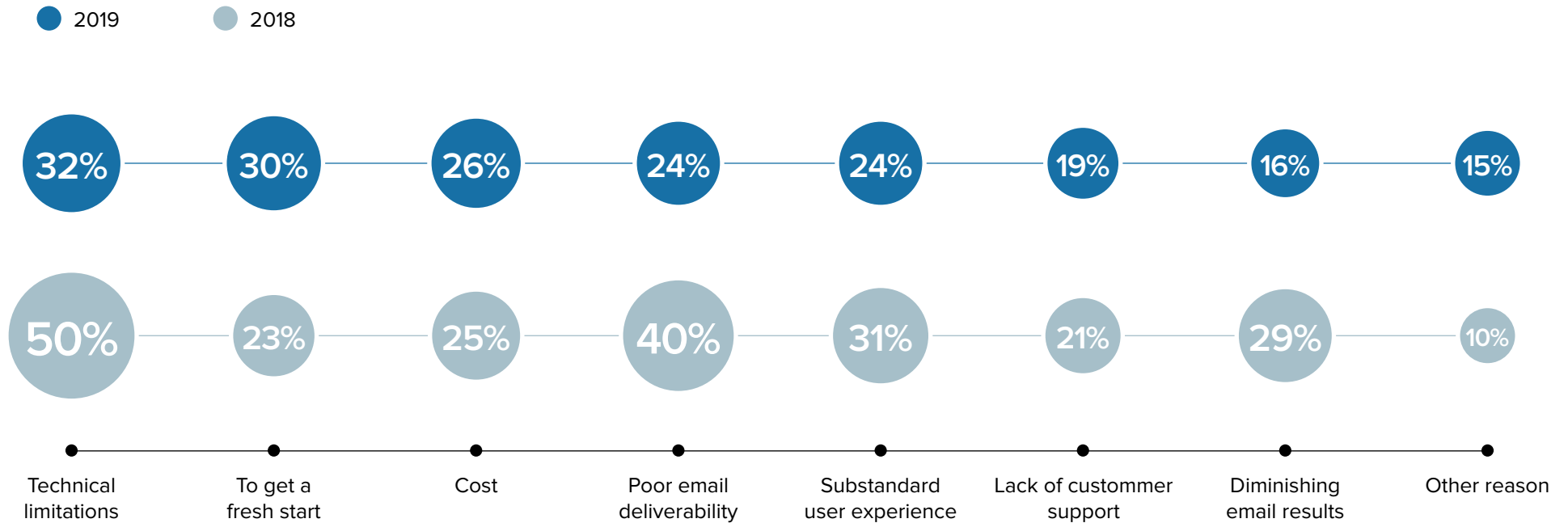
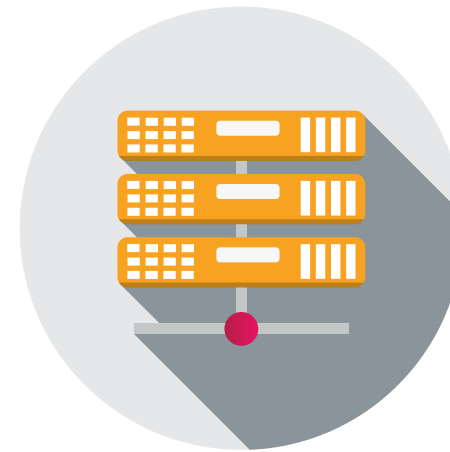


The reasons study participants gave for making an ESP or IP change are shown in **Figure 13**.

**FIGURE 13**

**Reasons for Changing ESP or IP**

No, single reason for changing dominates the list.



Perhaps the most important question to answer regarding changing the ESP, IP, or both is, does this strategy work? **Figure 14** shows the relationship between these changes and average open rates, which correlated in this study.

**Figure 14** suggests that changing ESPs or dedicated IP addresses is a bad idea: the firms in this study that did experienced noticeably lower average email open rates.

However, when considering these results, readers should understand that:

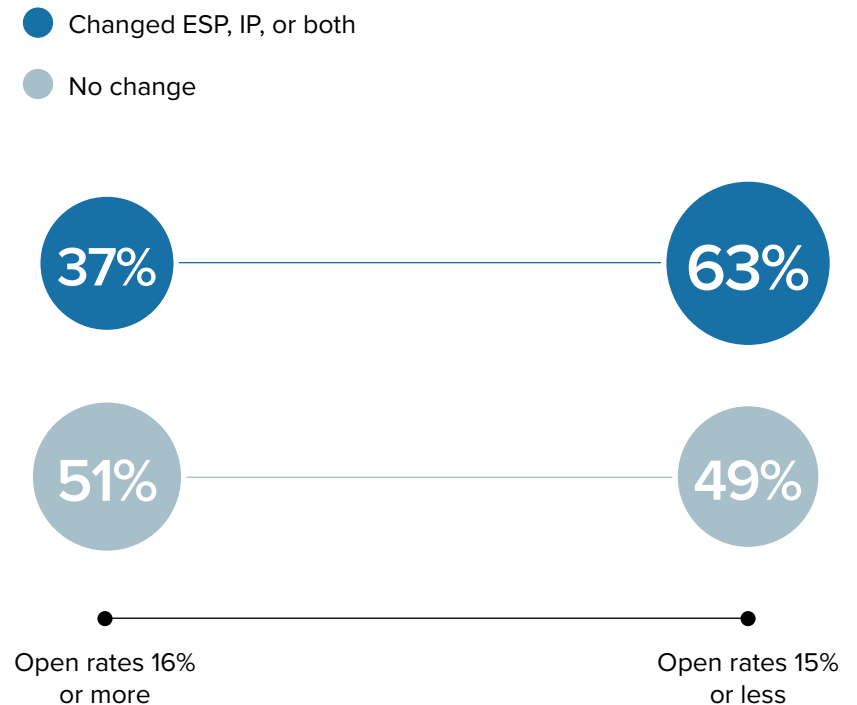
- 1 **Poor results are a leading cause of making a change in the first place.**
- 2 **The benefits of making a change are not immediately realized.**

**The lesson in this data is that marketers should ideally follow email marketing practices that eliminate the necessity to change ESPs or dedicated IP addresses.**

When it is necessary, however, some patience is required to allow the changes time to heal the online reputation damage that precipitated the change.

**FIGURE 14**  
**ESP/IP Changes and Open Rates**

Organizations that made no changes had higher, average open rates.



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## Email Marketing Tactics & Technology



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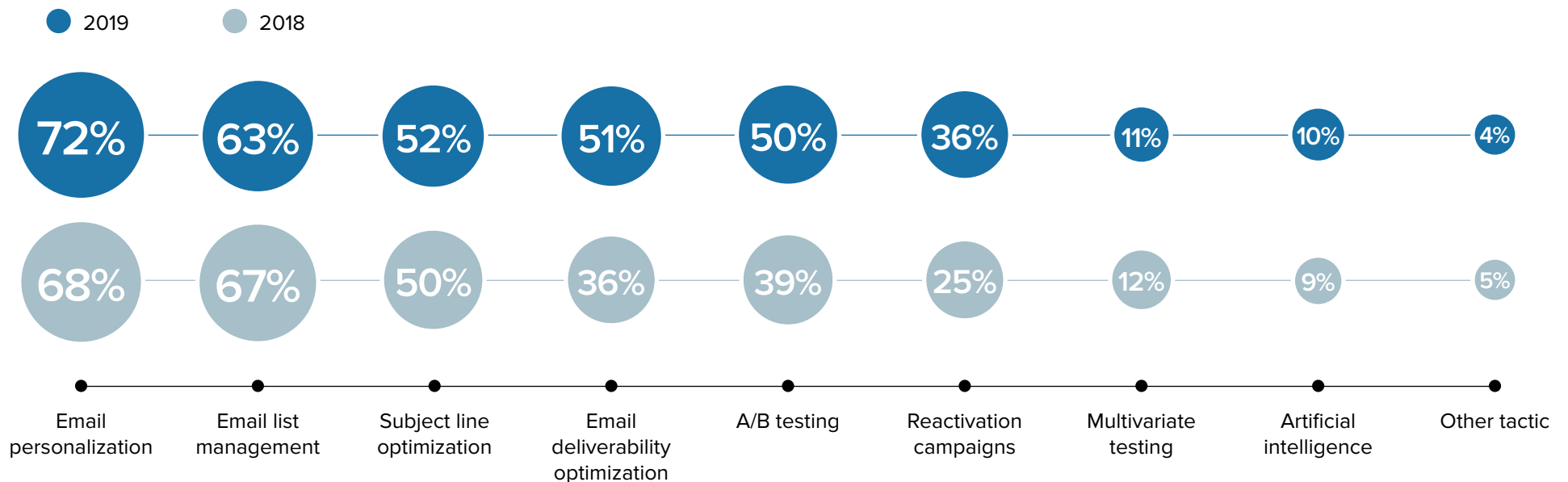
# Email Marketing Tactics & Technology

In the pursuit of increased email marketing effectiveness, marketers use a number of tactics. This study continues to measure the use of known email marketing tactics, and results from this year and the 2018 survey are shown in **Figure 15**.

The order of the three most popular tactics remains unchanged year-to-year, while the usage percentage shows slight changes. **The big changes from last year come in greater adoption of email deliverability optimization and A/B testing.**

**FIGURE 15**  
**Email Marketing Tactics**

Almost half of the study's participants report open rates of 15 percent or less.



Of tremendous interest are the tactics in use by those in the study who enjoy the highest, average open rates for their bulk email sends. **Figure 16** shows this view.

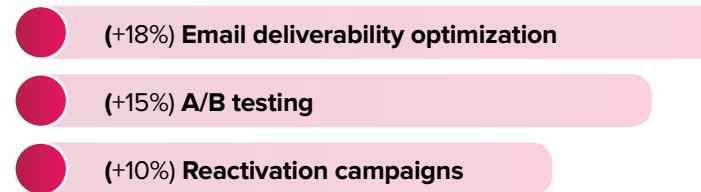
It seems obvious that those who enjoy higher average open rates are getting them because they use tactics that boost those rates.

**FIGURE 16**  
Tactics in Use with Highest Average Open Rates

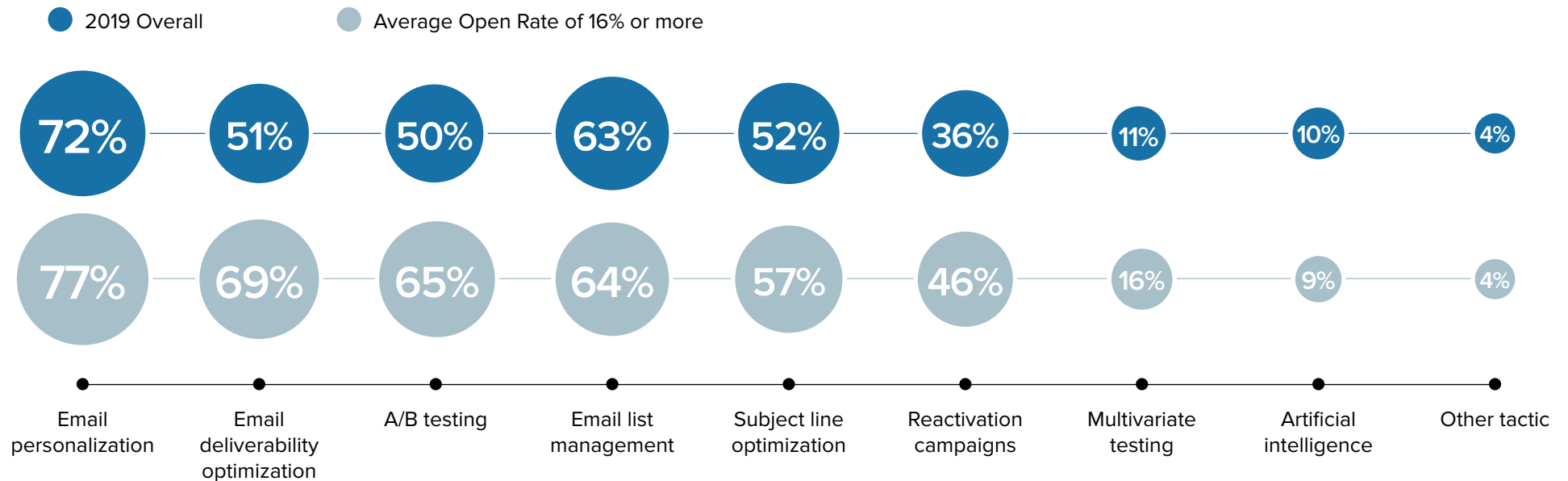
Almost every tactic sees greater use by those with higher, average open rates.

**Study participants that reported average open rates of 16 percent or greater also have higher adoption rates of the email marketing tactics, save one: AI, where the difference in usage is negligible.**

Of particular note are the tactics that show much higher adoption:



Email marketers with higher average open rates are doing something different to get those opens, and **Figure 16** provides insight into what they are doing differently.



A top tactic in both years of this study was email list management. **Figure 17** shows some of the actions study participants take to manage their email lists.

The one area of noticeable change, and a very healthy one, is lower use of purchasing email addresses as a list management action. **Email marketing pundits agree that the risks from adding purchased email addresses to lists far outweigh the benefits.**

**FIGURE 17**  
**Email List Maintenance Actions**

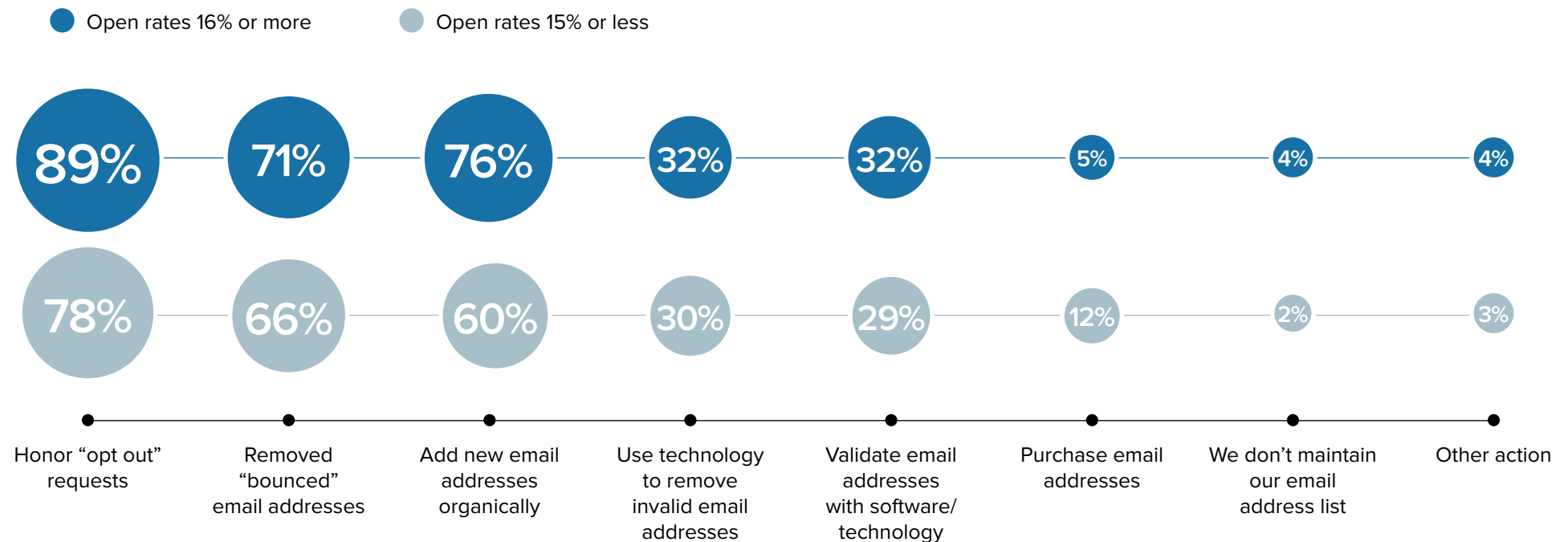


Segmenting these list maintenance actions by average email open rates reveals some insights, shown in **Figure 18**.

**Figure 18** confirms the conventional wisdom that marketers have had long exposure to: honoring opt out requests and growing email lists organically are keys to better email marketing performance. These actions are in far greater use by those who enjoy higher average email open rates.

**FIGURE 18**  
**Email List Maintenance and Average Open Rates**

Some email list maintenance actions are associated with higher average open rates.

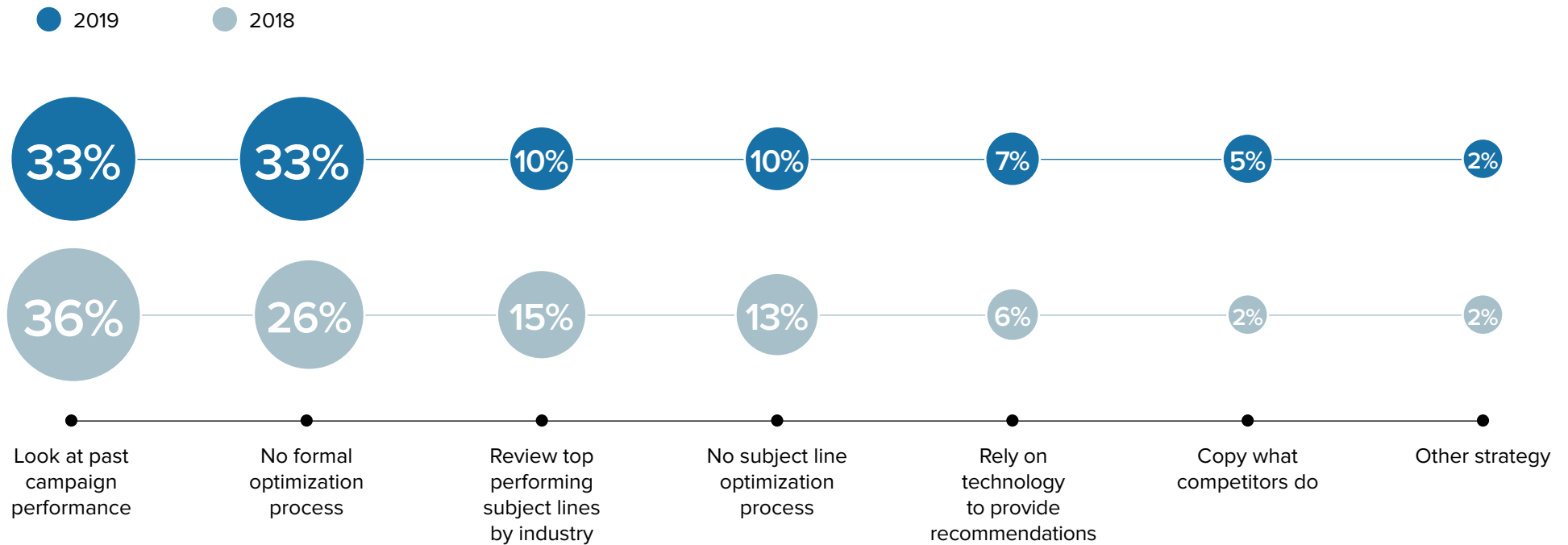


Another top email marketing tactic in both years of this study is subject line optimization. Various levels of formality around this process exist, which are summarized in **Figure 19**.

Comparing data across years, it seems that subject line optimization is a lower priority in the 2019 study. **Over 40 percent either have no process at all, or no formal process for this critical element of email marketing.**

**FIGURE 19**  
**Subject Line Optimization**

One-third of study participants have no formal subject line optimization process.

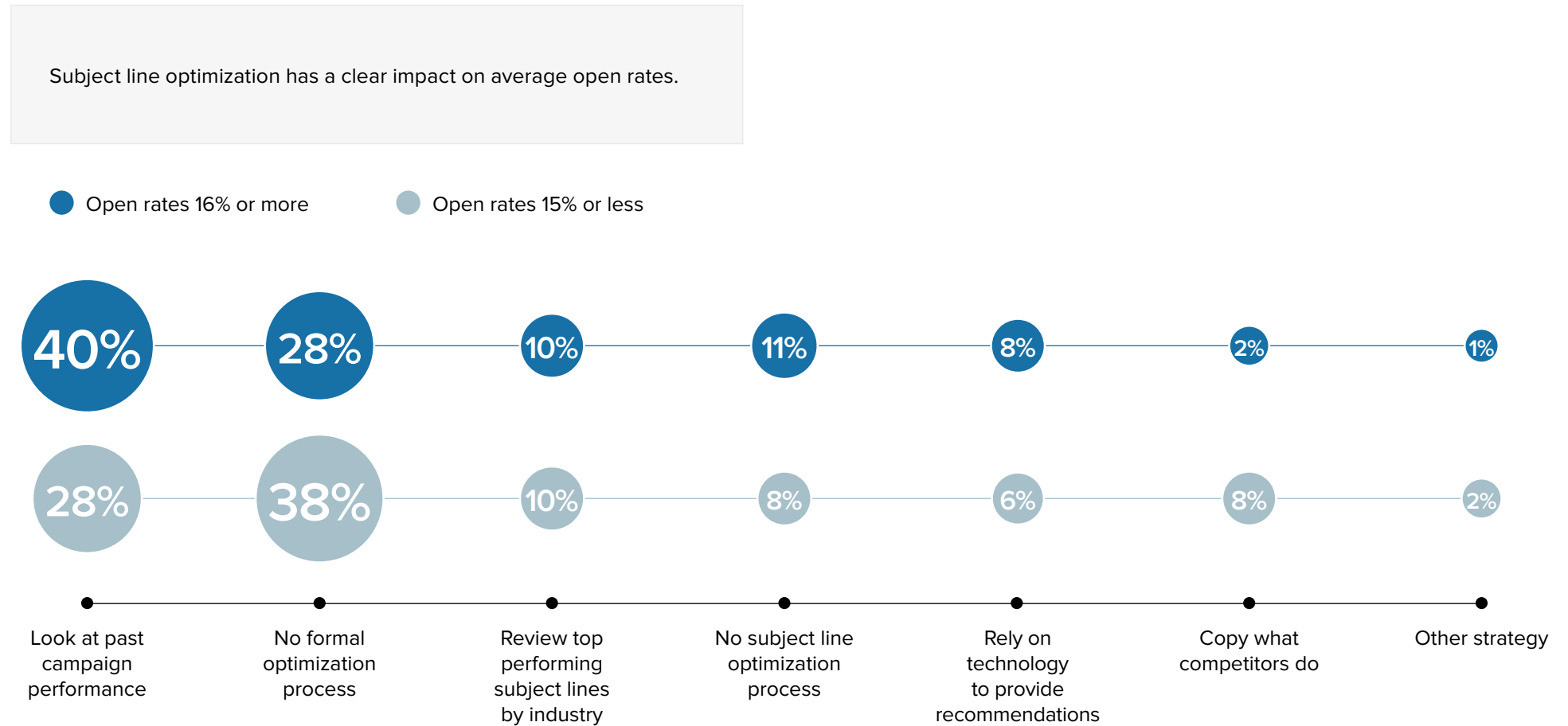


Open rates will again serve as a filter to understand the potential impact of subject line optimization practices on open rates. **Figure 20** compares low and high average open rates segments in the study.

What **Figure 20** makes obvious is that having a formal optimization process helps boost average email open rates, and that simply looking at past campaign performance does much to drive open rates in the right direction.

These relatively simple differences in behavior separate the segment with lower average open rates from the segment that enjoys higher rates.

**FIGURE 20**  
**Subject Line Optimization and Average Open Rates**



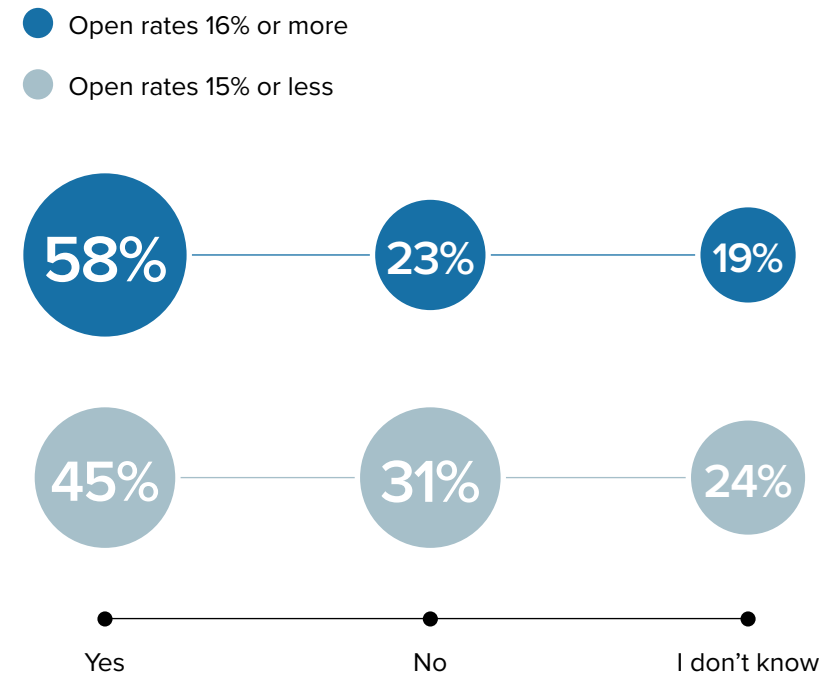
Inbox placement technology can provide marketers with an understanding of where their emails are really going. **In this year's study, 50 percent of the participants report using this technology, up substantially from 33 percent in 2018.**

**Figure 21** uses high and low average email open rate segments to show the impact this technology can have.



**FIGURE 21**  
**The Use of Inbox Placement Technology and Average Open Rates**

Inbox placement technology has greater adoption among those with higher average email open rates.



Sender Score is a measure of reputation for email marketers. It ranges from zero to 100, with higher scores related to better email deliverability. **In 2018, just 19 percent of firms in the study were using technology such as Sender Score to determine how mailbox providers rated them. This year, the figure jumps to 45 percent.**

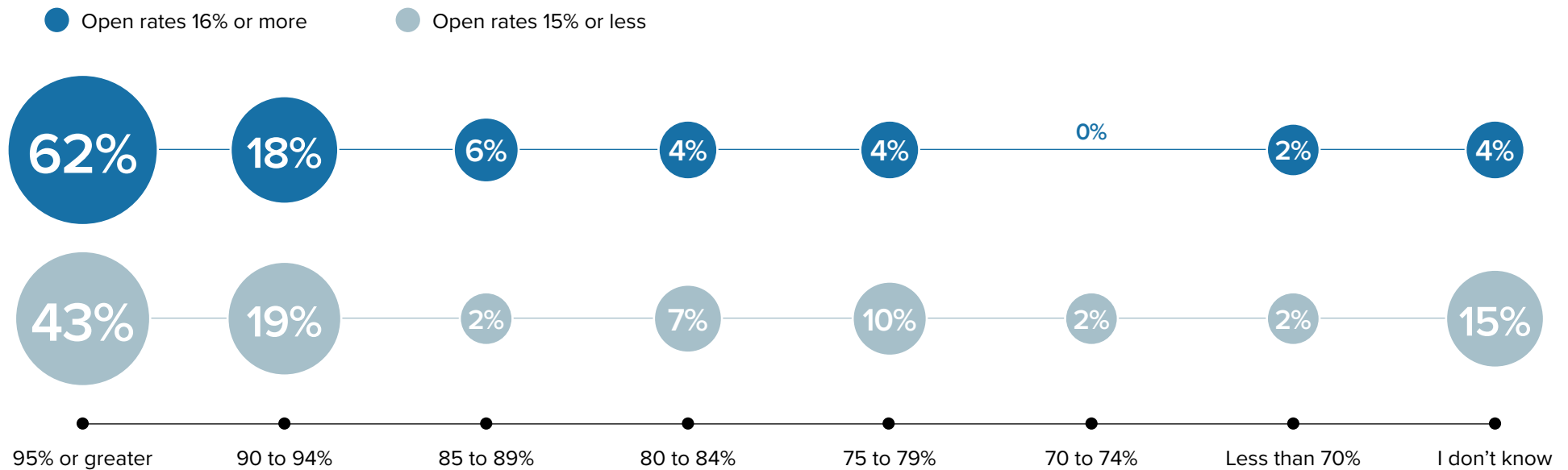
Average Sender Score ratings are shown in **Figure 22**, segmented by high and low average email open rates.

Consistent with other segmentations of this study’s data around average email open rates, the expected outcome appears in **Figure 22**. The practices that lead to higher Sender Scores have their desired result: higher average email open rates.

**FIGURE 22**

**Use of Technology to Monitor Sender Score and Average Open Rates**

Organizations with low average open rates have lower Sender Scores, or don’t know their score.





Blacklist technology is yet another tool available to marketers to help them continuously monitor the IP addresses associated with their email sends. This technology alerts users if a monitored IP address lands on a blacklist, enabling taking action to remedy this problem.

**Almost half (46 percent) of the study’s participants say they are using blacklist technology, a 19 percent increase over reported 2018 usage.**

As **Figure 23** shows, those who use this technology are more likely to enjoy higher average open rates for their bulk email sends.

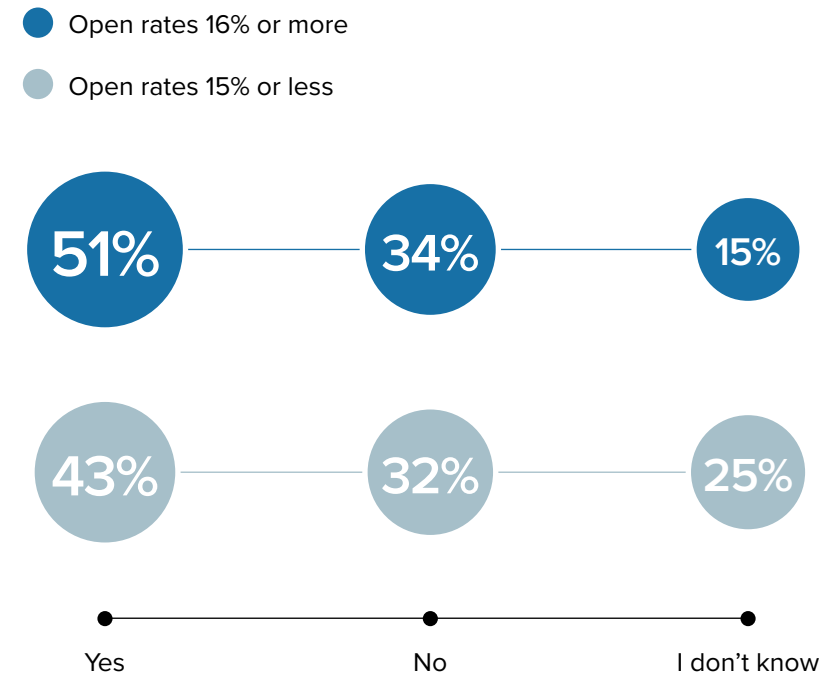
The reason blacklist technology helps drive average email open rates higher is because it addresses the deliverability issue. Many emails sent from blacklisted IP addresses may never hit the recipients’ inbox, and therefore are never opened.

Using this technology helps ensure emails land in inboxes, where opening them becomes a possibility.

**FIGURE 23**

**Use of Blacklist Technology and Average Email Open Rates**

Blacklist technology users report higher average email open rates.



Better than avoiding having an IP address blacklisted is working to have your company appear on certified whitelists. Less than 30 percent of organizations in this study know if they are on a certified whitelist, roughly the same level reported in the 2018 study.

**Figure 24** compares high and low average email open rates for appearing on certified whitelists.

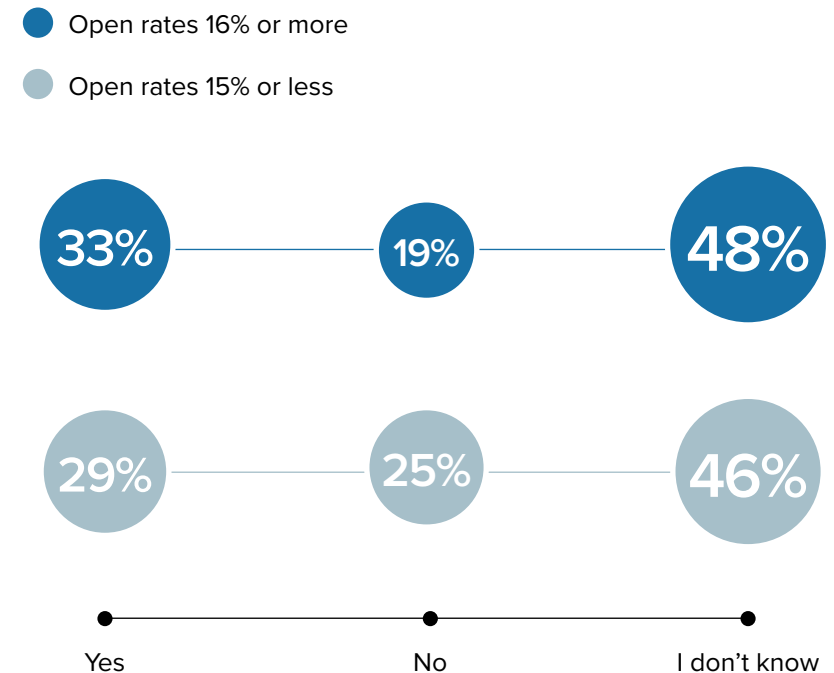
To appear on a certified whitelist is a very good thing for an email marketer. However, this data suggests that **it is more important to not be identified as a bad email actor than it is to gain recognition for being a good email citizen by virtue of appearing on a certified whitelist.**

Supporting this premise is the fact that over two-thirds of study participants have not taken any email training or certification.



**FIGURE 24**  
**Certified White Lists and Open Rate**

The differences in average open rate segments are slight.



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## Email Marketing Subscribers



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## Email Marketing Subscribers

It's possible for email marketers to know a great deal about their subscribers if they choose to exploit the data that is at their disposal.

**Figure 25** summarizes what study participants say they know about major subscriber preferences.

The year-to-year differences for known subscriber preferences are negligible. Comparing the high and low average email open rate segments reveals two preferences with noticeable differences:

- 1 **How long subscribers spend reading emails:** a 14-point delta.
  - 20 percent for open rates of 15 percent or lower
  - 34 percent for open rates of 16 percent or higher
- 2 **Which mobile device subscribers use to read emails:** a 11-point delta
  - 56 percent for open rates of 15 percent or lower
  - 67 percent for open rates of 16 percent or higher

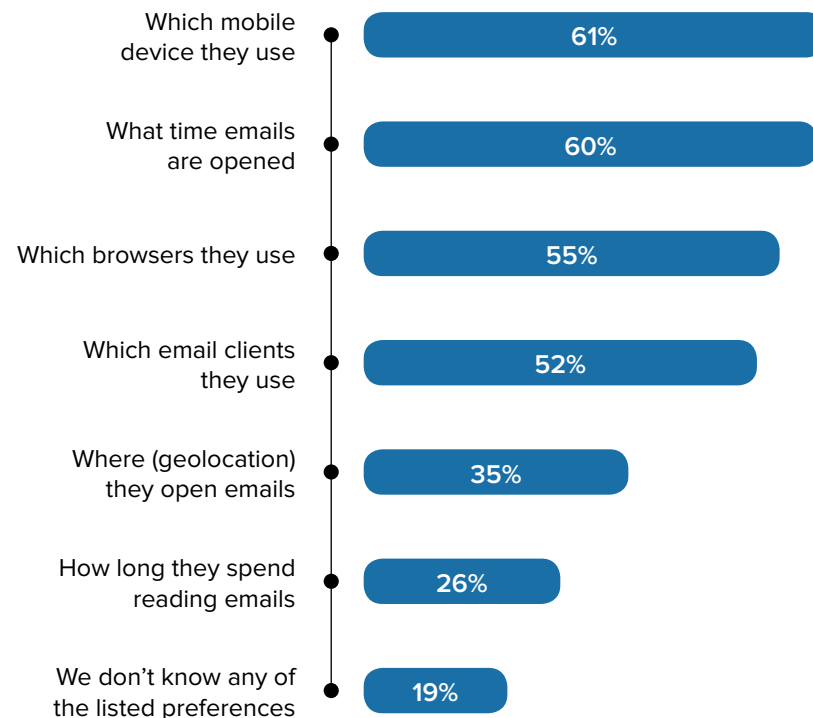
**The delta for these two preferences is not coincidental. Time spent reading email is one of the best engagement indicators.**

Furthermore, other studies report that most email is now read on a mobile device, and it stands to reason that marketers should want to understand which devices their subscribers use to enable message optimization.

**FIGURE 25**

### Known Subscriber Preferences

Many marketers know a great deal about subscribers.



Marketers that wish to create a great customer experience must focus on every single touchpoint that customers have with brands, and that includes email.

**Just over 70 percent of study participants use technology to preview email campaign sends across various devices and clients before sending, a slight increase from 2018.**

**Figure 26** displays the differences between average email open segments.

Generating previews is yet another example from this study of technology that is available to help email marketers improve campaigns. Plenty of technology advantages are available to marketers who choose to use them.

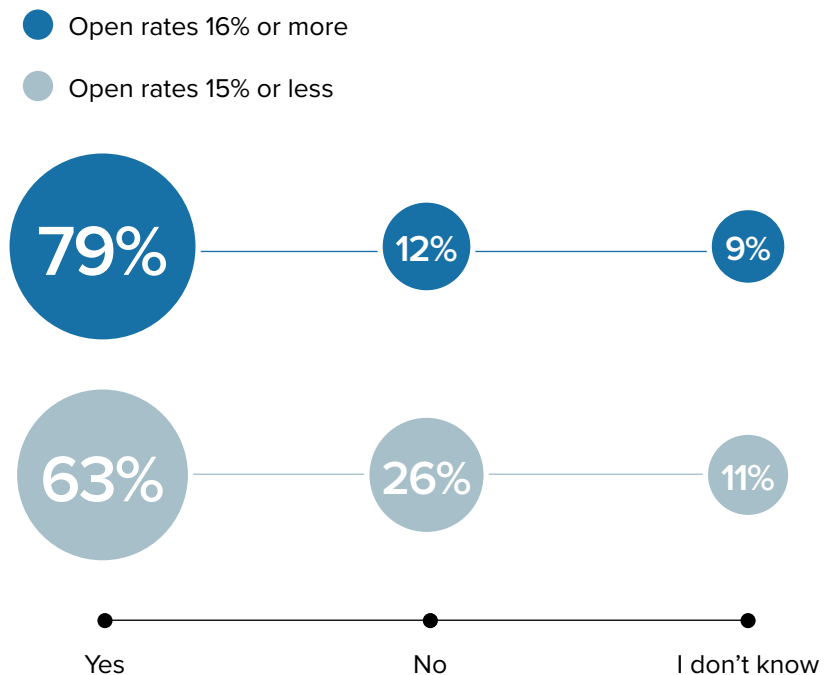
A comprehensive email marketing plan includes having more advanced intelligence about the subscriber base:

- Which competing brands are also emailing subscribers
- Which days of the week are busiest for subscribers
- What competitor email campaign metrics are

Over half (53 percent) of the participants in this year’s study have no visibility into these items, down from two-thirds in 2018.

**FIGURE 26**  
**Using Technology to Preview Emails Prior to Sending**

Using preview technology is associated with higher average email open rates.



Monitoring competitor email activity is an in-depth aspect of monitors that, in 2018, 57 percent of study participants failed to do.

The percentage is lower in the current survey year, with barely half who monitor competitor email activity. There are several forms that such monitoring might take:

- **Subscribe to their lists using an alias**
- **Subscribe to their lists under a true identity**
- **Use 3rd party software or technology to monitor**
- **Monitor through cooperative partners or customers**

**Figure 27** shows the difference in average email open rates based on competitor monitoring.

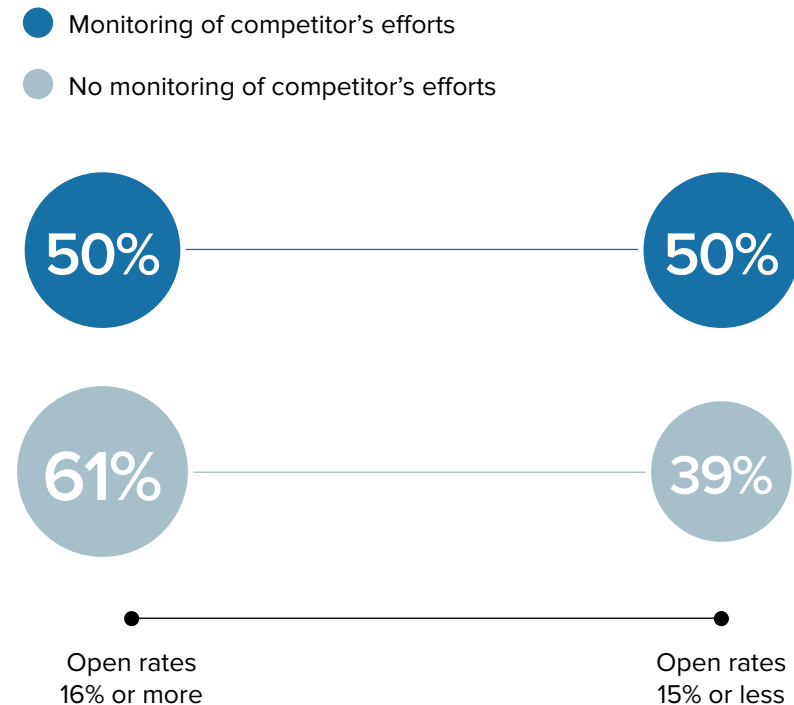
Assuming that marketers exploit the insights that come from monitoring competitor activity, doing so appears to impact average open rates.



**FIGURE 27**

**Competitive Email Monitoring and Average Open Rates**

Those who practice competitor monitoring also enjoy higher average email open rates.



# THE STATE OF EMAIL MARKETING

2019



# Email Marketing Performance



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## Email Marketing Performance

It's possible for email marketers to know a great deal about their subscribers if they choose to.

As this and many of the graphs in this report show, many factors influence average email open rates. **Open rates are an important metric because the actions that marketers hope for from a bulk email send require that recipients open messages.**

However, the act of opening an email isn't the end game—a conversion is, and that conversion is quite often a click.

A strong correlation exists between open and click rates, and **Figure 28** shows this relationship using the now familiar high and low average email open rates.

The relationship between open and click rates is not as intuitive as some may conclude. **A message with a compelling subject line, sent from a company on a certified whitelist, may fail to generate clicks due to poorly written email body copy.**

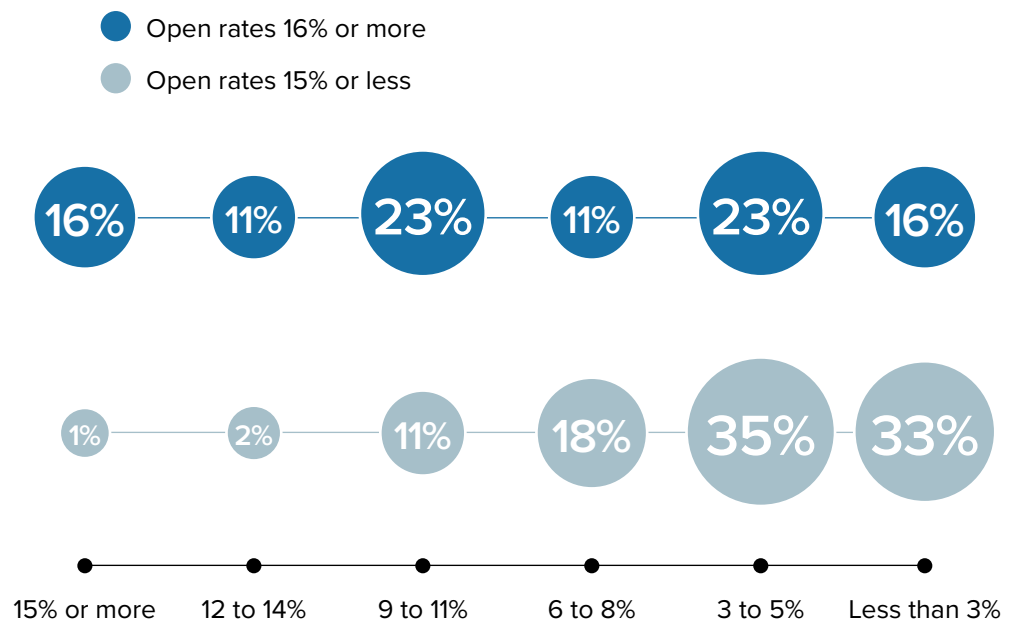
Conversely, a brilliant email message is easily foiled through a bad subject line or failure to test.

This relationship between open and click rates suggests, more than anything, that marketers that follow best practices to ensure email opens apply that same level of care to crafting messages that generate conversions.

**FIGURE 28**

### Relationship Between Open and Click Rates

Higher open rates lead to higher click rates.





One final correlation will bring this report to a conclusion. The presence of an organization on a certified whitelist (Figure 24) correlates to revenue growth. **Figure 29** summarizes this relationship.

What the data from **Figure 29** affirms is that where email marketing is concerned, an ounce of prevention is worth a pound of cure.

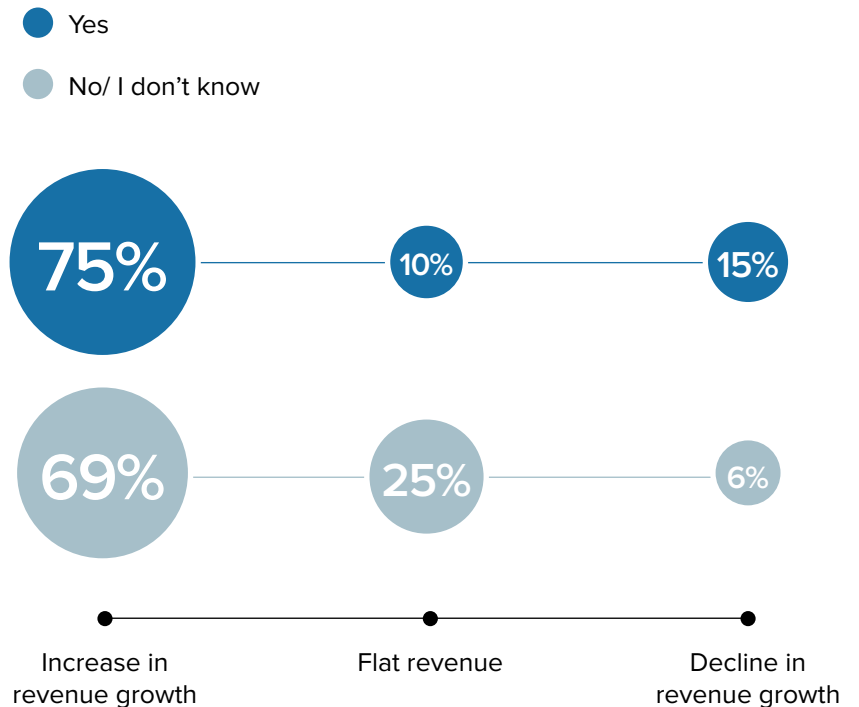
**The characteristics of organizations that are intentional about ensuring that their email marketing practices earn them a place on a certified whitelist are the same characteristics that lead to revenue growth.**

Perhaps this is obvious, much like saying that a person who goes to the gym regularly is in better physical shape. But the relationship between email marketing and revenue growth (Figure 5) emerged in the 2018 study, and appears again in this year’s study.



**FIGURE 29**  
**Certified Whitelist Appearance and Revenue Growth**

Organizations that appear on certified whitelists are more likely to experience revenue growth.



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## Analyst Bottom Line and Recommendations



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## Analyst Bottom Line

Marketers should strive to achieve high levels of email marketing effectiveness.

The cost of email is low relative to other channels, and when compared to the potential return on email marketing, the ROIs are often high.

Despite the volume of data this report shares, the email marketing strategy is simple:

- 1 **Ensure that emails have the highest possible inbox placement rate**
- 2 **Craft subject lines and use tactics that generate the highest possible open rate**
- 3 **Construct messages and use tactics that generate as many clicks (conversions) as possible**



# Recommendations

A number of recommendations come out of this study to help marketers execute this strategy at the highest level of effectiveness:

**1**

## Set bold objectives.

Like any initiative, email marketing needs direction. Setting bold objectives for an email marketing program helps drive the action and attention to detail that lead to greater effectiveness.

In this study, participants with the highest average email open rates were more likely to have revenue generation as one of their email objectives.

**2**

## Use the right tactics.

Figure 16 lists a number of email tactics, and the use of any of them is associated with higher average open rates. Specifically, email deliverability optimization, A/B testing, and reactivation campaigns were particularly strong at driving more opens.

**3**

## Maintain your list.

It's far too easy to forget about maintaining your subscriber list, but failing to do so steadily erodes open rates.

This study shows that honoring "opt out" requests, adding new email addresses organically, and removing bounced email addresses are the maintenance actions that have the greatest influence on open rates.

**4**

## Optimize your subject lines.

Perhaps no other aspect of an email message has more to do with generating an open than the subject line. Yet, creating a subject line is often a last-minute task to which little thought is given.

Where subject lines are concerned, simply looking at past campaign performance and learning from it was the single practice having the biggest impact on open rates.

5

**Leverage technology.**

This study references a number of technologies, and the use of any of them – inbox placement, Sender Score, blacklist, preview, and certified whitelist technology – relate to higher average open rates.

6

**Know your subscribers.**

Failing to learn subscriber preferences compromises the effectiveness of email marketing efforts. The study found that two preferences in particular relate to higher average open rates: knowing how long subscribers spend reading emails, and knowing which mobile device subscribers use to read emails.

7

**Know your competitors.**

The study shows that monitoring competitor email activity, either as a subscriber or using third-party technology, relates to higher average open rates.

What's important for marketers to understand about achieving greater email marketing effectiveness is that **the study identifies no single “game changing” practice that yields exponentially better results.**

Instead, it is through the adoption of all the recommended practices and technologies that in aggregate will help marketers attain the highest possible performance from their email marketing efforts.



## Acknowledgements

Demand Metric is grateful to ReturnPath for sponsoring this research, and for those who took the time to complete the study survey.



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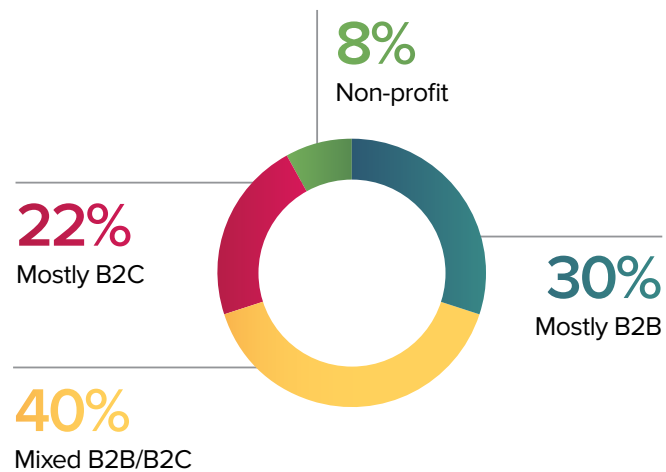
## Appendix: Survey Background

This 2019 Email Marketing Benchmark Study survey was administered online during the period of June 27 through July 19, 2019. During this period, 315 responses were collected, 293 of which were qualified and complete enough for inclusion in the analysis. Only valid or correlated findings are shared in this report.

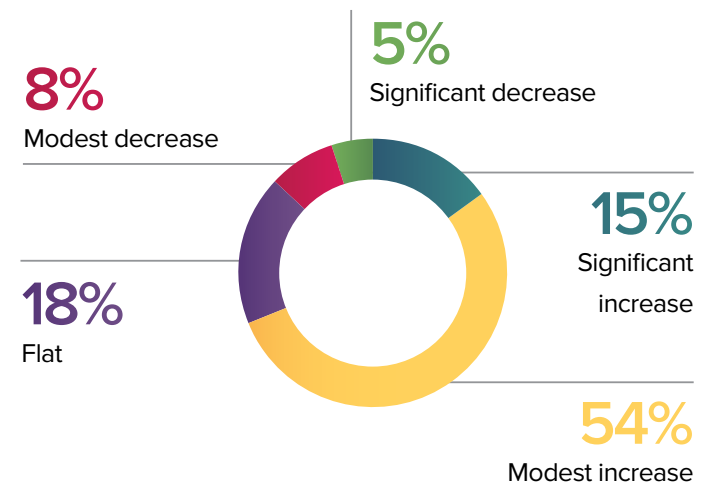
The representativeness of this study's results depends on the similarity of the sample to environments in which this survey data is used for comparison or guidance.

Summarized below is the basic categorization data collected about respondents to enable filtering and analysis of the data:

### TYPE OF BUSINESS/MARKET FOCUS



### REVENUE GROWTH ENVIRONMENT IN MOST RECENT FISCAL YEAR





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