The Email Subscriber Experience 2008 - 2013:

How Email Tactics and Consumer Behavior Have Evolved in Five Years

Return Path

Introduction

In 2008 a Return Path survey of top brands found that nearly half collected postal addresses during email signups, sometimes asking for even more information before adding subscribers to their email lists. Five years later, one-third of those same brands want only an email address, and most are satisfied with a name and a zip.

This is only one way in which the email subscriber experience has evolved since Return Path first signed up for 61 brands' email programs (and then later unsubscribed) to see them from the consumer point of view. In five years email standard practices and policies have shifted, sometimes radically. Today, thanks to new technological insight into consumer behavior, not only can we compare the email subscriber experience then and now, we can identify marketers' most common approaches and apply engagement metrics to see how customers respond to the latest best practices. From signup to unsubscribe this report revisits the full lifecycle of an email marketing relationship to see what's changed and what hasn't, and more important, what's working five years later.

The Beginning: Signup - Don't Ask Much, Don't Ask Twice

Subscribing to an email program is simpler today. Not only do brands request less information, they make the signup path easier to find. In 2008 roughly a quarter of the sample did not include a signup link of any kind on their homepages; today every one of them does. Moreover all but one include a subscription link in the header or footer of virtually every page of their sites. And once the form is submitted, very few ask for confirmation: Confirmed opt-in is no longer standard practice among these marketers.

What They Request, Then & Now

Just an email address:

| 20% |
| 33% |

Full name, zip, or birthday:

| 33% |
| 34% |

Additional information

| 47% |
| 33% |

► **2008**   ► **2013**

Confirmed Opt-in Policies Rarely Applied
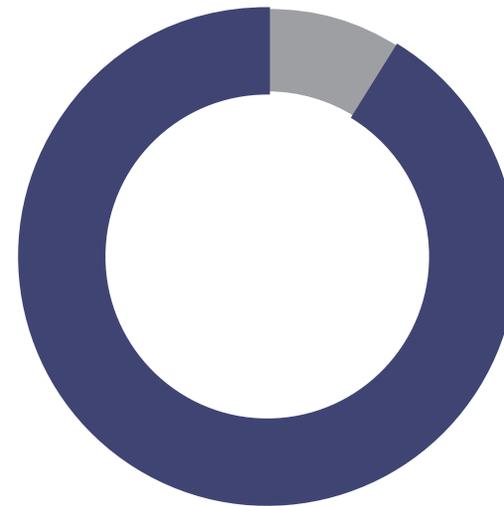
► **Require Confirmed Opt-in: 9%**

► **Don't Use Confirmed Opt-in: 91%**

The brands that still require consumers to confirm their subscriptions didn't benefit from this policy, with one exception: They got far fewer complaints. Subscribers were nearly twice as likely to launch a spam complaint against senders that don't use confirmed-opt in. Neither did the amount of information collected during signup dramatically affect subscribers' engagement levels. No matter how much information they asked for, marketers' messages were received, read, and complained about at roughly the same rates.

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Confirmed Opt-in Out of Fashion, But Still

► **Don't Use Confirmed Opt-in**

► **Require Confirmed Opt-in**

Delivered as Spam

4.1%

3.6%

Read Rate

21%

22%

Complaint Rate

0.027%

0.014%

Best Buy sign up form 2008
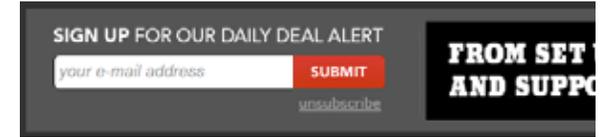
Best Buy sign up form 2013

Leaner and Meaner: Best Buy stood out in 2008 for its unusually complex email signup form. Today the company makes it remarkably easy to subscribe.

Amount of Information Collected During Signup

► **Just Email**   ► **Name, Zip, or Birthday**   ► **More Information**

Delivered as Spam

3.5%

3.7%

5.1%

Read Rate

21%

22%

22%

Complaint Rate

0.021%

0.025%

0.031%

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Starting Out: First Contact – Welcomes Work

Sending a welcome message to new subscribers is standard practice today, but most senders didn't do this in 2008. Now 80% send one, and most send it right away. Senders that skipped the welcome message altogether saw lower read rates than others, although their delivery and complaint rates weren't substantially worse. Despite how promptly most welcomes arrive, subscribers generally have to wait longer before they see regular messages: Three days after signup, only a quarter of these brands had sent standard email. Nearly a quarter still hadn't sent a regular message after two weeks, and ten percent hadn't sent anything a month after signup – although that's an improvement from 2008 when 30% sent nothing in the first month.

Whether their first email was a regular or welcome message, fewer marketers this year (39%) sweetened it with a special offer, like discounts or free shipping; five years ago 65% of the sample led with an offer.

Days Before Welcome Message Arrived

▶ **Same day: 75%**

▶ **One: 13%**

▶ **Two or three: 7%**

▶ **More than three: 5%**

You're Welcome?

Sent a Welcome Message:

40%

80%

▶ **2008**   ▶ **2013**
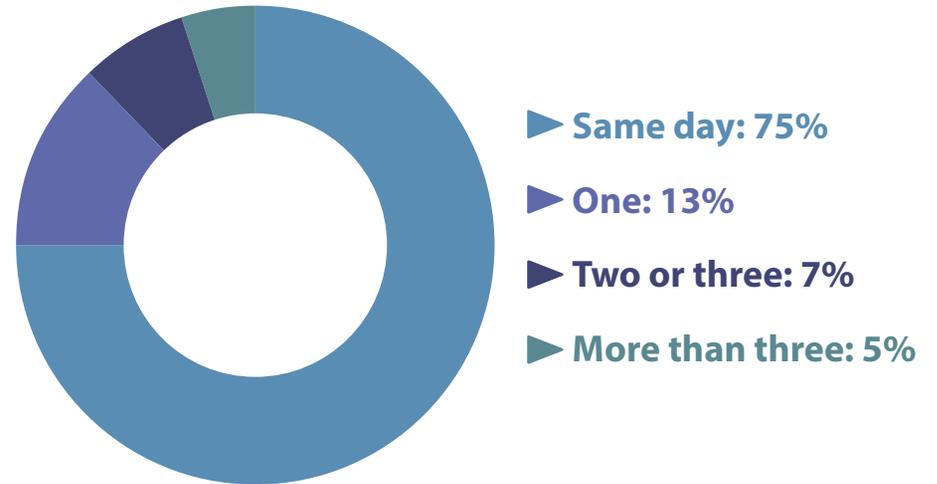
Days Before Regular Messages Began

▶ **One or less: 16%**

▶ **Two or three: 22%**

▶ **Four to seven: 36%**

▶ **Eight to 14: 12%**

▶ **More than 14: 22%**

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The Email Subscriber Experience 2008 - 2013
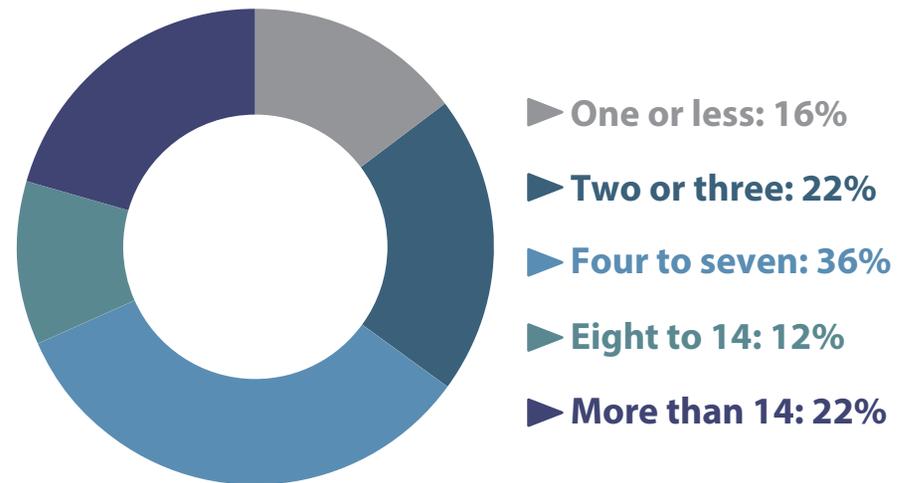
Offer Included in First Message?

Sent a Welcome Message:

65%

39%

▶ **2008** ▶ **2013**
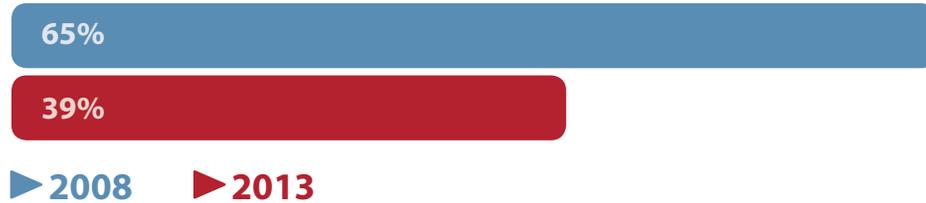
While welcome messages appear to set the tone for stronger customer interaction, waiting to start regular mailing erased some of that goodwill: Delaying the first regular message correlated with an increase in complaints. TIS (This Is Spam) rates for brands that started regular mailings within a week were half of those that waited more than two weeks to begin regular mailings.

Meanwhile those that opened their email relationships with a special offer outperformed their peers: Subscribers who got an offer with their first message received more of that brand's email in their inboxes and also read more of their messages.

Special Offers Make a Difference

Delivered as Spam

4.7%

3.0%

Read Rate

21%

23%

Complaint Rate

0.023%

0.028%
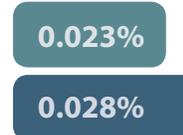
▶ **No Special Offer**
▶ **Led with Special Offer**

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The Core Experience: Regular Communications – This Time it's *Not* Personal

While most marketers continue to request information that could be used to personalize email campaigns, relatively few of the brands in this sample took advantage of this data: Only 22% referred to a name, location, or other identifying information in their messages, down from 25% in 2008. As they did then, a number of senders are still collecting personal information they don't use. It isn't hurting their subscriber engagement, though – brands that didn't personalize messages got more of their mail delivered to subscribers' inboxes and had higher read rates. Perhaps surprising, subscribers were also less likely to complain about these senders.

Subscribers were also least likely to complain about mail from the most frequent senders. TIS rates for brands sending more often than once-a-week were nearly 20% lower than for weekly senders. And while these frequent senders paid a slight penalty in inbox placement, their read rates were similar to weekly senders'. Brands that sent less frequently than once-a-week saw significantly better read rates, though, as more than a quarter of their messages were read. These less frequent senders had the easiest time reaching the inbox, too, with spam rates that were roughly half of weekly senders' and one-third of more frequent senders'.

Reaching the inbox was important enough to these brands that most reminded subscribers to add them to whitelists or safe senders lists to prevent messages from being diverted to spam folders. These efforts coincided with positive engagement indicators, but not with inbox placement: Senders that did not include a whitelist reminder in their messages actually delivered more of their mail to subscribers' inboxes. On the other hand their overall engagement was weaker, with slightly lower read rates and higher complaint rates. Reminding subscribers to actively watch for messages may reinforce their value independently of any effect on deliverability.

Personalized Messages

Delivered as Spam

13.6%

3.6%

Read Rate

16%

22%

Complaint Rate

0.031%

0.024%

▶ **Contained Personalization**

▶ **Did Not Personalize**

![Return Path logo]

The Email Subscriber Experience 2008 - 2013

Message Frequency

Delivered as Spam

4.4%

2.7%

1.5%

Read Rate

20%

20%

26%

Complaint Rate

0.022%

0.027%

0.024%
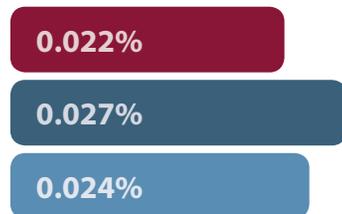
► **More than Once-a-week**

► **Weekly**

► **Less than weekly**

Whitelisting Reminder

Delivered as Spam

4.4%

3.7%

Read Rate

22%

21%

Complaint Rate

0.021%

0.027%
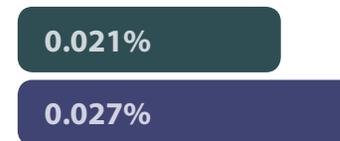
► **Included Whitelist Reminder**

► **No Mention of Whitelisting**

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Farewell: Unsubscribing – Opt-down Picking Up

Unsubscribing from reputable brands' email programs was relatively straightforward in 2008, and nearly all stopped mailing relatively quickly. Only two required subscribers to send an email message to get off their lists, and nearly 90% stopped sending within the CAN-SPAM Act's ten-day window. Now none of these brands requires email confirmation to unsubscribe, and 95% stopped sending within ten days.

While these fundamental elements of the unsubscribe process haven't changed much, marketers have shifted their approach in other areas to retain these customer relationships and gather more information. These senders have largely abandoned the post-opt-out confirmation message that 25% sent to unsubscribers in 2008—only 7% sent one this time. Instead 25% now offer opt-down alternatives like different sending frequencies or message types through preference centers, something only two senders did five years ago. Nearly twice as many offered a change of address option this year, anticipating one reason happy subscribers might opt-out. To understand other reasons, 22% asked unsubscribers for feedback; again, only two did this in 2008.

In their confirmations 25% told unsubscribers how long it would be before they stopped receiving email, setting expectations and potentially softening the negative effect of post-unsubscribe messages. In general marketers have taken steps to prevent unsubscribes, to learn from those they can't prevent, and to ensure that the experience doesn't reflect negatively on their brands.

Slow Unsubscribes Draw Quick Complaints

Sent a Welcome Message:

0.022%

0.031%

► **Stopped mailing within 10 days**
► **Mailed beyond ten-day window**

Unsubscribe Practices Then & Now

► **2008**   ► **2013**

Offer Different Frequency/Content:

3% ▬▬▬▬ **25%**

Offer Change of Address:

11% ▬▬▬▬ **20%**

Reminder of Program Benefits:

3% ▬▬ **3%**

Solicit Feedback/Reasons:

3% ▬▬▬▬ **22%**

Send Opt-out Confirmation Email:

7% ▬▬▬▬ **25%**

Stop sending within 10 days:

89% ▬▬▬▬▬▬▬▬▬▬▬▬▬▬ **95%**
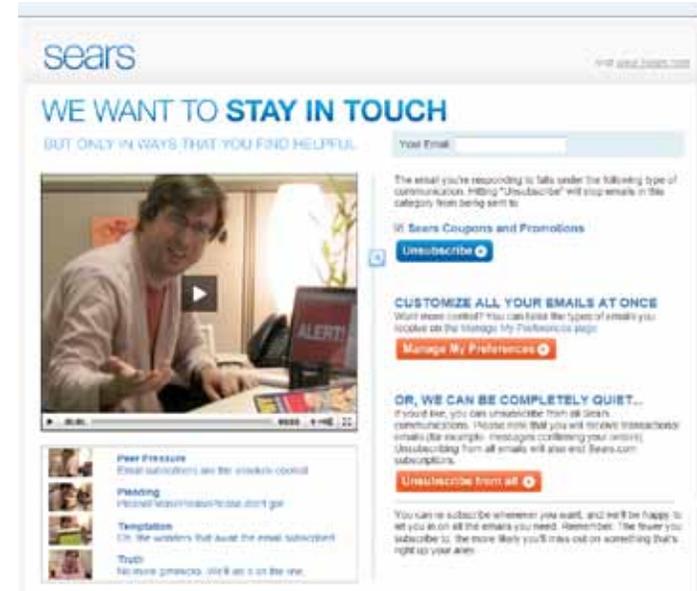
Leave 'em laughing: Sears' preference page offered unsubscribers three flavors of "please don't go" videos. They're legitimately funny and provide even the unswayed with a positive, memorable brand interaction

Next Steps: Mapping Evolving Tactics to Engagement Outcomes

What's working? Which practices are getting people to see messages and engage positively with brands?

Tracking inbox placement and consumer behavior against distinct variations in email marketing programs—especially those that have either evolved or proven themselves over a five-year span—creates a unique and potentially prescriptive view of what works. Although obviously not a clear remedy for specific marketing problems (correlation does not indicate causation), overlaying practices with results using key engagement metrics can help troubleshoot known issues and guide preliminary explorations into solutions.

This matrix compares distinct components of subscriber engagement to marketing tactics and practices evaluated in this report, showing which correlated with performance differences between brands that used them and brands that didn't.

	Inbox Placement	Read Rate	Complaint Rate
Collect only email at signup	Slightly better	No difference	Slightly better
Collect more than name, zip,	⬇ Worse	No difference	⬇ Worse
Require confirmed opt-in	Slightly better	Slightly better	⬆ Sharply better
Send welcome message	No difference	⬆ Better	No difference
Begin regular sending w/in a week	No difference	No difference	⬆ Sharply better
Open with an offer	⬆ Better	Slightly better	Slightly worse
Personalize messages	⬇ Sharply worse	⬇ Worse	⬇ Worse
Send more than weekly	⬇ Worse	No difference	⬆ Better
Send Weekly	⬆ Better	No difference	⬇ Worse
Send less than weekly	⬆ Sharply better	⬆ Better	Slightly better
Include whitelisting reminder	Slightly worse	No difference	⬆ Better

Best vs. Not-best Practices: What's Working

The most successful senders in this sample shared some common practices and avoided others that didn't work for their peers. In several cases the tactics that didn't work for these brands probably still work for others, but some commonsense advice that most followed five years may now be ineffective:

#1 Best Practice:

Start off with an offer. Brands that began relationships with a gift had an easier time reaching the inbox and getting messages read.

#2 Best Practice:

Start regular messages right away. Subscribers rarely complained when they began receiving the email they signed up for within a week.

#3 Best Practice:

Collect as little information as possible. Brands that asked the bare minimum of new subscribers saw virtually no downside.

#1 Not-best Practice:

Personalization. At least for these brands, personalized messages didn't improve subscriber engagement.

#2 Not-best Practice:

Ask lots of questions. Personalized messages provided no lift, and requiring personal information at sign-up generally hurt performance.

#3 Not-best practice:

Press for whitelisting. The senders who included these reminders didn't necessarily see weaker performance, but their peers had better luck reaching subscribers' inboxes.

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Methodology

In February 2008 Return Path subscribed to 61 email marketing programs from retailers, consumer brands, and companies in the travel industry. In August 2008, after monitoring what each sent, we unsubscribed from 45 of these programs to chart the procedures and communications during the process. In June 2013 we subscribed to 76 programs including as many of original programs as possible and a number of others in the retail, consumer brand, and travel industries. After monitoring messages from each of these, we unsubscribed in August 2013 to compare the experience to the original study.

We then analyzed engagement data derived from our panel of 3 million email subscribers, including roughly 10 million messages from the selected brands received during a 30-day period between June and July, to map key email performance indicators to senders' marketing tactics. As noted in the text, correlation is not causation, and this is a limited sample of consumer relationships – so your results may vary.

Brands included in this Report * not included in 2008 reports

Ace Hardware*
Adidas
Airfarewatchdog*
Alamo Rent A Car*
American Airlines
Avon*
Barnes & Noble
Best Buy
Betty Crocker
Bloomingdale's*
Blue Nile*
Bravo TV
Budweiser
Burpee*
Carnival*
Carter's*
Century 21 Department Store*
Chico's
Clinique

Costco*
Crate & Barrel
Cunard Cruise Line*
CVS Photo*
Disney.com
Walt Disney World
Enterprise Rent-A-Car
Expedia
Figi's
Ford Motor Company
Frontgate
Gaia Online
Gardens Alive
Gerber
Hallmark
Hawaii Tourism Authority
Hertz
Hilton Hotels and Resorts
Horchow

I Love New York
JetBlue
KAYAK
Kohl's
Kraft Foods
Levi's
Lord & Taylor
MAC Cosmetics
Marriot Hotels
Martha Stewart
Miami Dolphins
Modnique
Neiman Marcus
The New York Times
Nike
PBS
Piperlime
Priceline
PurePlay

Ritz-Carlton
Sam's Club
Sears
Sephora
Sharpie
Six Flags
Southern Living
Southwest Airlines
Sports Authority
Staples
Target
Tiffany & Company
Toys R Us
Travel Channel
Travelocity
Visit Las Vegas
Walmart
Warner Bros.
Zappos

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