Consumer Email Tracker

2021

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Customer Engagement

Data & Marketing Association

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/ Introduction

This year's investigation into people's relationships with email comes after a year significantly impacted by a global pandemic that has changed the way we all learn, live, play and work. The early foray of messages from brands early in the UK's first lockdown and through 2020 has certainly changed consumer behaviours in some interesting ways.

Brand recognition has never been more important, particularly in deciding whether someone opens an email. In 2020, this brand recall is seen as more important than the subject line's content– 68% compared to 59%. The importance of relevance has increased (55%) to become the leading reason they like brand emails – even surpassing discounts and offers (53%). Simply liking the brand (46%) also turns out to be a key driver.

This year's results also have shown progress for some of the email's long-term trends. The halo effect of GDPR continues to improve key measures of the channel's success and the number of consumers wondering where brands got their email has continued to decline – from 43% in 2017 to 28% in 2020.

Most significantly, the way consumers engage with interesting emails continues to evolve. While clicking on the link remains the single most likely action (19-29%), consumers are almost as likely to engage with the brand indirectly or via another channel (19-26%) as they are to click. In other words, many attribution models may be vastly under-valuing the power of email.

Overall, email remains the best channel brands can use across the customer journey – according to over 70% of consumers. This year's study also reveals emails' role as the most popular place to save important information sent by brands as around half of consumers (48%-56%) currently use their inbox in this way.

As part of our analysis, we looked at consumer groups through a range of different lenses, including comparing cohorts according to their generation, gender and where they live. These unique insights are included throughout the report.

2020's data offers an interesting insight into consumers relationships with email and how this has changed – in both the short- and long- term, as well as between generations and genders. The insights highlight the opportunities email can offer across the customer journey and the importance of putting the consumer first when building customer engagement programmes.

Lastly, this report would not be possible without the support of Validity and the DMA's Email Council and Research Hub. Their knowledge throughout the research process has been invaluable and I'd like to thank them all for their help and insights.

Tim Bond
Head of Insight, Data & Marketing Association

/ Foreword – Email Council

This report provides a great reminder that email marketing is part of a much bigger ecosystem, and the way subscribers engage with their emails reflects this. A clear indication is seen in reasons for unsubscribing, where around a fifth of responders cite negative experiences outside of the email program – a poor in-store experience or negative publicity, for example.

Some email marketers experience this regularly – we once had the program owner for a mid-table Premiership football club as our guest at an Email Council meeting. He explained his weekly newsletter went out on Monday if they won the previous weekend, but on Wednesday if they lost, giving the negative sentiment time to dissipate.

This year has been no exception, and this report provides some great illustrations of the macro-influences that were in play during 2020:

The Covid-19 Pandemic Impact:

The arrival of Coronavirus signalled major changes for global email strategy. Almost overnight messaging focus pivoted from promotions to information, delivered with empathy, and addressing big changes in work/life balance that altered when consumers engaged with their emails. These combined adjustments have re-written the engagement playbook – for the first time ever, respondents have rated 'relevance' over 'offers' when explaining what they most like about marketing emails.

We have also seen a big shift in device usage, with desktop/laptop devices back on a par with mobile devices as consumers worked-from home more and commuted less.

The GDPR Halo Effect:

GDPR had the effect of writing many established email best practices into law, and the 'Marketer Email Tracker 2020' report showcased significant rises in deliverability, response rates and conversions as a result. These benefits are also seen in changed consumer behaviour – greater sender recognition, higher perceived usefulness, and reduced complaint activity are all identified in this tracker.

Brands perceived as 'not doing email well' have reduced by over a third since 2017, while 'lack of relevance' as a factor driving opt-outs has also reduced by a third over the same period.

The Changing Mailbox Provider Landscape:

Email marketers are highly focused on their list composition, and rightly so – there has been an 8% year-on-year swing from Microsoft to Gmail usage, driven by younger subscribers. Senders know subscribers respond in different ways depending on which Mailbox Provider (MBP) they use. This is because of clear variances in their subscriber profiles (age, gender, location, tech usage, etc.) and because the different user interfaces and functionality create behavioural differences.

This research provides a wealth of deep insights into how subscribers engage with their messages. Some engagement drivers can be influenced by senders, some can be harnessed, and some (like those above) must simply be adapted to – but nearly all are shaped by consumers' desire to receive personalised and relevant content.

This is often paraphrased as right person/right message/right time…but it's also about right context – understanding the moment subscribers are in when they receive your emails and reflecting it.

As Peter Drucker stated: "If you can't measure it, you can't improve it!" Each of the insights in this report represents an improvement opportunity. Harness some of them and next year it could be your campaign getting votes for 'Who does email really well?

Guy Hanson,
Deputy Chair of DMA
Email Council & Vice President of Customer Engagement
Validity International

/ Foreword – Validity

Value is the foundation stone of successful relationships between brands and their customers.

That's why, when email Customer Lifetime Value is a healthy £34.56 (per the DMA's own research), we're not just talking about how much those customers spend; we're also focused on the value they receive in return. This value can be tangible (discounts, free delivery), but it can also be intangible (useful information, helpful advice), and when customers believe a fair exchange of value exists their relationship with the brand is in equilibrium.

Perhaps even more important for marketers is that when this happens trust is formed, and their customers are more likely to provide their best personal data. As this report clearly demonstrates, consumers only give their primary email addresses to brands they trust. These are the addresses they use most actively, so winning that trust creates a virtuous circle of engagement, meaning stronger relationships and increased program value.

Good marketers understand this, and email's measurability provides them with an instant feedback loop, both positive (opens and clicks) and negative (opt-outs and complaints). Some critics try to position this as 'spying', but ethical senders use these data points as a force for good, using them to shape factors like content, frequency and even tone of voice to deliver the best possible experience for their subscribers.

That's why this report is so important – email metrics provide the what, but not necessarily the why. There are very few credible insights into what consumers think about the marketing emails they receive. Sometimes these findings challenge established thinking – who knew sender recognition is a bigger driver of open rates than a killer subject line? By understanding what is most important to their customers, marketers can tailor their email messages to maximise effectiveness and minimise intrusion.

That's why we are so delighted that nine out of the top ten brands named in this report as 'doing email really well' are Validity clients. More than anything else, email subscribers appreciate relevant messaging that provides genuine value, and to achieve this requires high quality data and consistently reliable delivery – that's precisely what we do.

As you read through this report, put yourself in your customers' shoes and be honest in viewing each finding through the lens of how they think about your email program. Feedback is a gift and while it's sometimes not easy to hear, it's always an opportunity to improve – reinforcing the fair exchange of value and enhancing subscriber trust and loyalty.

When you have your customers' backs, they will have yours in return.

Wayne Parslow
Executive Vice President, Validity International

/ Exec Summary

Marketing Landscape

- Consumers say 'Email' is the best channel brands can use across the customer journey (over 70%), followed by a range of other channels depending on the context
- Consumers regularly wondering how a brand got their email address has continued to reduce post-GDPR (from 43% in 2017 to 28% in 2020)

Email Ownership

- On average, UK consumers have around two personal email addresses (1.8) – mostly using Google (38%) or Microsoft (33%) to provide these personal emails – and less than one work email (0.6) – in fact, half of people do not have a work email (50%)
- One in four people (26%) use their additional email addresses to receive some or all the marketing messages sent to them, while one in five use multiple accounts for both personal and marketing emails (18%)
- Desktop/laptop (64%) and smartphone (62%) are the devices most often used to access personal emails, with one in four using their tablet (25%)

Account Behaviours and Engagement

- Nearly all consumers check their personal emails at least daily (96%) – either hourly (33%) or daily (63%) – with 3% checking once a week or more and 1% less often
- Email is the most popular place to save/store information sent by brands too, whether that's account information (48%), bills (51%), offers/marketing (56%), product/service information (53%) or receipts (55%)
- The reasons behind this use of email as an information store are primarily convenience (58%) and that it's easy to search retrospectively (55%) – with one in five (18%) also mentioning they often lose physical copies

Receiving and Opening

- The average UK consumer is signed up to receive emails from 10 brands, the main drivers for giving their email to a brand are to receive discounts and offers (48%), being a regular customer (45%), receive an e-receipt (42%), the requirement of making a purchase (39%) and joining a loyalty scheme (38%)
- One in five people (18%) estimate they open and read over 75% of the emails they receive – a slight increase on previous years – with a similar proportion (20%) estimating they read 50-75% of the messages in their personal inbox
- The most important factors in opening an email are brand recognition (68%) and the subject line (59%)

Content and Actions

- Just one in six (15%) people report that at least half the emails they receive are useful, although the one in four (26%) reporting the usefulness of 25-50% of emails, represents an increase compared to the 17% in 2019
- Relevance (55%) and offers (53%) are given as the main reasons for liking emails customers receive from brands – liking the brand (46%) and containing useful information or news (39%) are also important factors
- Amazon (12%) is the most named brand when asked which are doing email well, although over 1,200 different brands were named in total and 44% of consumers said they could not name a brand that's good at email
- Clicking on the link is the most popular action when receiving an interesting email (19-29%) – however, a similar proportion report engaging with brands indirectly or via another channel when they receive an interesting email (19-26%)

Unsubscribes

- The main driver for unsubscribing is receiving too many emails (56%), followed by information no longer being relevant (38%), not remembering having signed-up (34%) and not recognising the brand (34%)
- Most people (54%) now use the link provided to them to unsubscribe, with 15% choosing to contact the brand directly, but one in five continues to mark emails as spam (18%)
- Half of consumers (49%) expect to never receive another email from a brand once they've unsubscribed, but one in five (21%) expect to still receive transactional emails – while one in five are open to being offered options to change the emails they receive (11%) or a survey about why they're unsubscribing (8%)
- Given the option to manage the communications they receive from the brand, most would like to reduce email frequency (36%), only receive specific messages (32%) and choose to receive more personalised emails (24%) – although a third would simply rather unsubscribe (31%)

/ Marketing Landscape

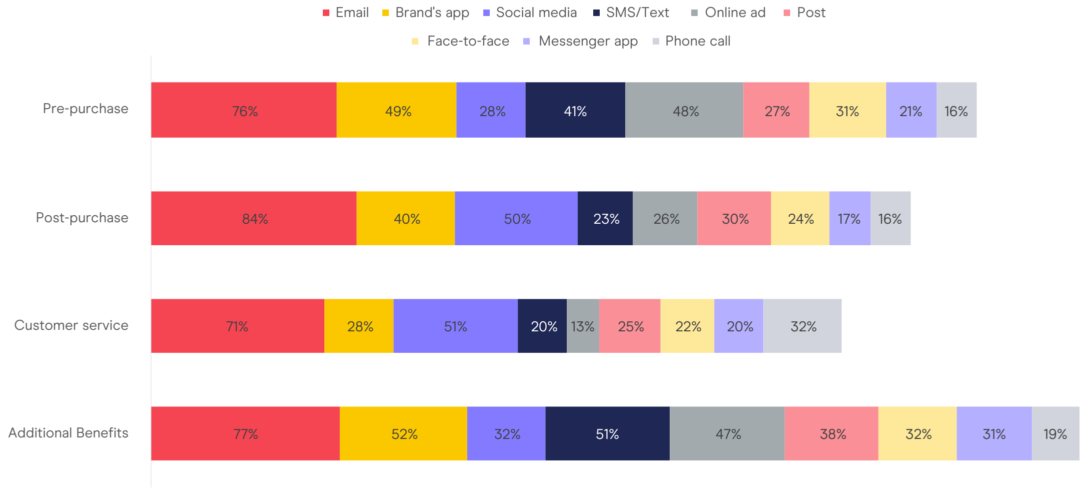
We begin with an overview of the marketing channels consumers use. How do they prefer to engage with brands across the customer journey?

We mapped customers' contact preferences from pre- to post-purchase and beyond.

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

- **Pre-purchase:** Discounts, offer or sales; Advice, information or reviews; New products or services
- **Post-purchase: Receipts;** Order confirmations or delivery updates; Tutorials /user guides
- **Customer service:** Customer service (e.g. account/service information or local updates); Appointments/reminders (e.g. birthdays or booked appointments/event)
- **Additional benefits:** Competitions; Events (either in-person or virtual); Exclusive content (e.g. articles, photos, videos); Access to other brand/shop/site benefits

Which of these types of subject would you agree are best served by the following communication methods? (Select all that apply)



Overall, email remains the most popular communication channels across the customer's journey, with over two-thirds agreeing it best serves their needs in each of the contexts we asked about. The secondary choice of channel is where we see more variance.

Pre-purchase, half of people also like to engage via a brand's app (49%), online ads (48%), or social media (41%) – all following email's lead (76%). Whereas post-purchase, email has the highest preference (84%), with SMS/text messages (50%) and brand apps (40%) also being popular. The preference for SMS/text appears to be driven by its popularity for order confirmations and updates (44%), while tutorials and user guide content are pushing engagement with brand apps (32%).

Customer Service contact is preferred through email, (71%), SMS/text (51%) and phone calls (32%). Again, its use for appointments and reminders is driven by SMS/text usage (46%) and phone calls (25%).

To find out about additional benefits, customers appear to like a variety of different ways to engage, with email (77%) followed by brand apps (52%), social media (51%), online ads (47%) and face-to-face (38%). Access to other benefits appears to be driving the popularity of online ads (28%), while events are where face-to-face is preferred (29%).

Demographically, women are more likely to say SMS/text is the best channel for order confirmation (48%), exclusive content (36%) and events (30%) – and men less so (40%, 28% and 22% respectively). Women are also more likely than men to report discounts, offers and sales are best served by email (68% vs. 61%), as well as competitions by social media (32% vs. 24%).

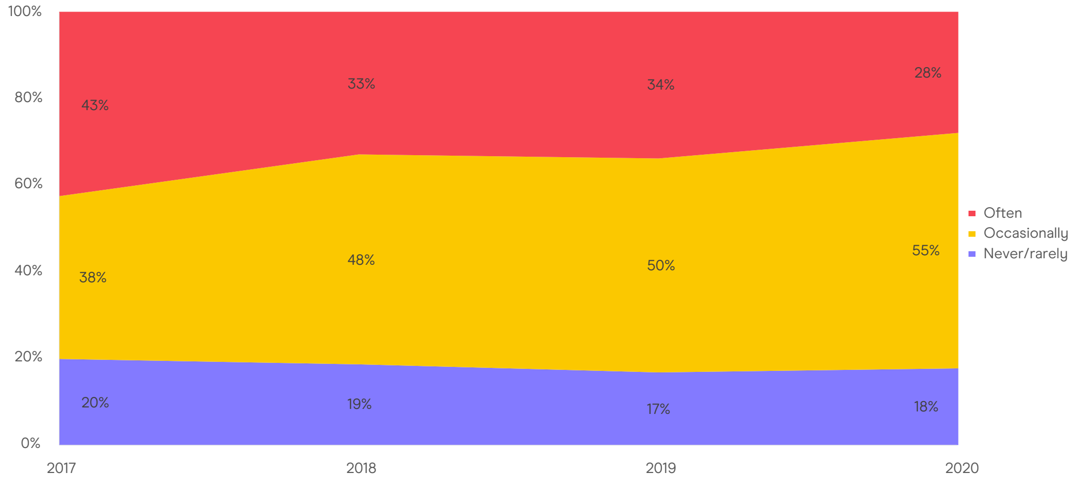
Generationally, Baby boomers are generally less likely to believe any content is best served by any channel, except for a couple of notable contexts. These are email being used to send order confirmations (78%), customer service responses (62%) and exclusive content (48%), as well as post being used to send receipts (20%), and tutorials/user guides (17%).

Furthermore, Gen X consumers are more likely to say discounts/offers and receipts are best sent via email (70% and 73%), but less likely to think customer service is best conducted via social media (9%). Millennials and Gen Z are generally more likely to welcome any content via any channel, but Gen Z is significantly more likely to believe social media best serves competitions (45%), events (41%) and customer service (28%).

The myriad of channels available for brands and consumers has only served to make the customer engagement ecosystem even more complex. However, email remains the central thread around which a multi-channel approach can and should be built. An email address offers both a unique identifier for a customer, but also a touchpoint that can trigger engagement through the other preferred channels.

In other words, the importance of email data quality is ever-increasing – something we explored in much more detail in the 'Email Data Quality: Compliant, Correct and Complete' report.

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



There's good news in terms of data protection best practices following the introduction of the General Data Protection Regulations (GDPR) in 2018. The number of consumers regularly wondering how a brand got their email address has also continued to reduce.

The latest figures show the number 'Often' wondering this has dropped from 43% in 2017 to 28% in 2020. However, this does still represent one in four consumers and the proportion of those who never or rarely feel this way has not changed significantly over the same period.

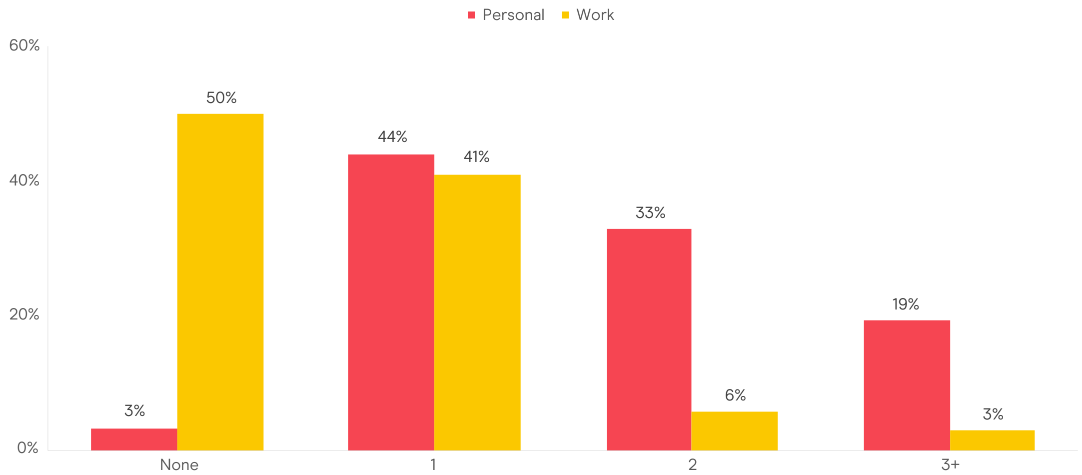
Baby boomers are significantly more likely to say they often wonder how brands got their email (35%), highlighting a possible generational difference in usage of best practice systems such as preference centres (as found in the 'Unsubscribes' chapter).

Therefore, albeit these figures continue to tell a positive story, they also point to further room for continued improvement. Brands could also benefit from being more proactive about reminding customers how and when they originally signed up.

/ Email Ownership

In this chapter, we investigate the email addresses consumers have (and don't), the providers they use and their preferred devices. We highlight some of the fundamental differences between customer cohorts, but also between marketers and 'normal' consumer.

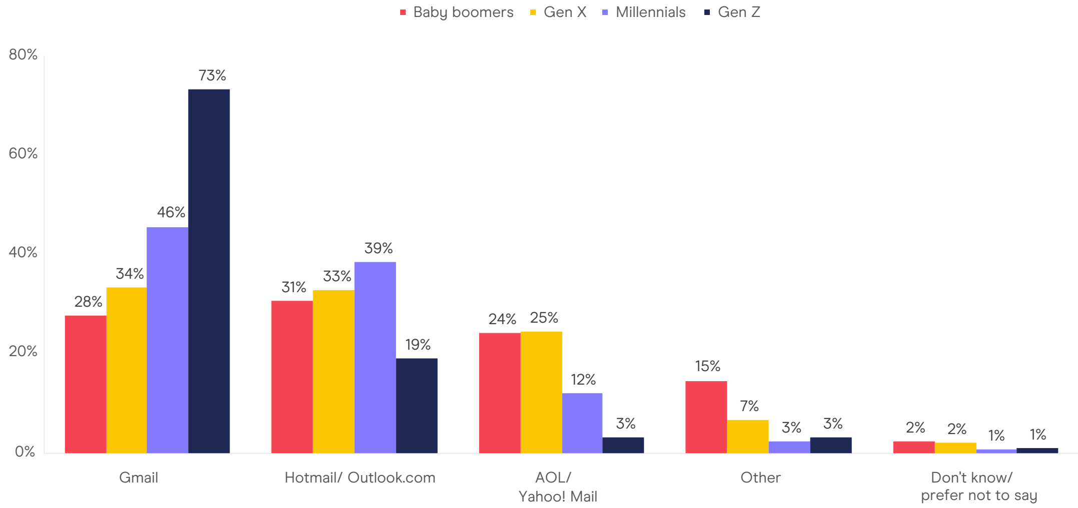
How many email addresses do you have?



The majority of consumers have one or two email addresses (77%), while one in five has three or more (19%) and just 3% have none at all. However, most significantly, half of consumers do not have a 'Work' email address (50%) – highlighting a key difference in the day-to-date relationship with email these people have and how it differs from many marketers' own experience.

Overall, the average UK consumer has around two personal email addresses (1.8) and less than one for work (0.6). Men are also slightly more likely to have multiple personal addresses (2.0) compared to women (1.7).

Thinking about the personal email address you use most, which of the following providers do you use? (Generation split)

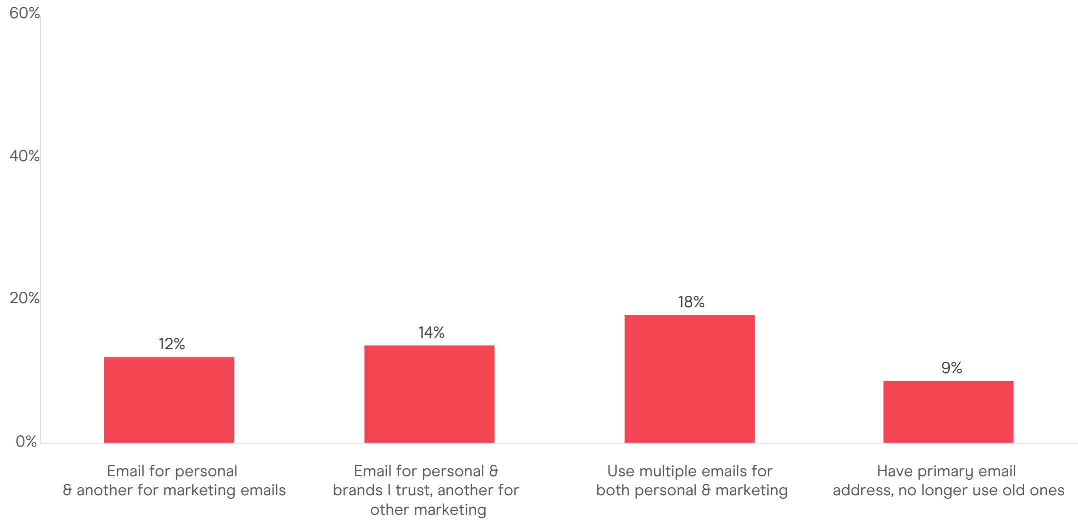


The majority of consumers opt to use Gmail (38%) or Hotmail/Outlook.com (33%) to provide their primary personal email address. Year-on-year this represents a slight increase for Google (up from 34% in 2019), which appears to have also come from its main rival in Microsoft (down from 37% last year).

The increase in those choosing Google's offering also appears to be heavily driven by younger generations, particularly Gen Z consumers (73%). Baby boomers, on the other hand, appear to be the power users for the providers beyond the 'Big 2' tech brands.

Notably, women are more likely to have a Hotmail – not including Outlook – address than men (24% compares to 19%). Finally, consumers living in more urban areas (44%) are more likely to use Gmail, while those living rurally are more likely to use one of the 'Other' providers (13%).

How do you use your different personal email addresses?



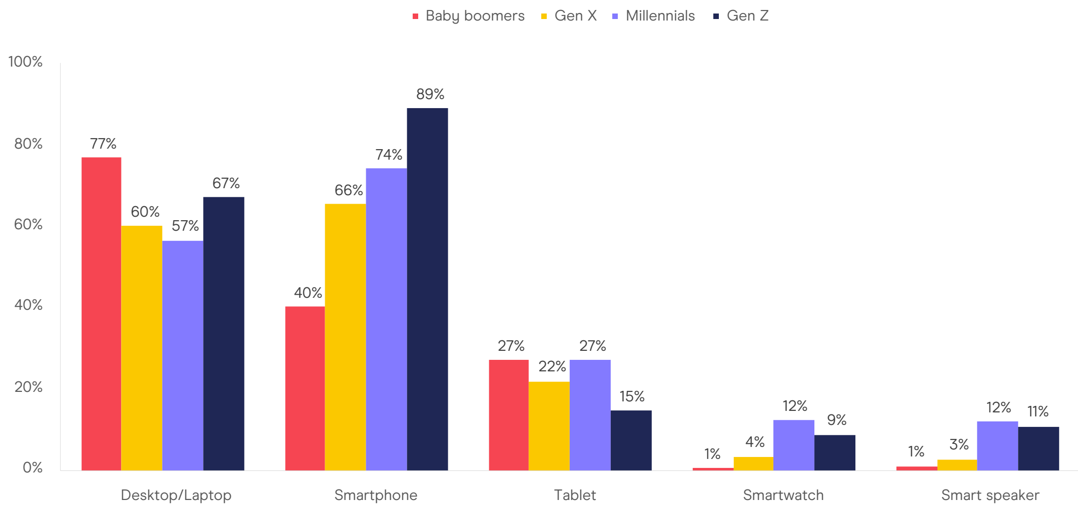
When it comes to how consumers use their email addresses, one in four (26%) have an additional address they use to receive some or all the marketing messages sent to them by brands. Whether that's having a dedicated address for marketing emails (12%) or allowing trusted brands into their primary inbox and having an alternative for others (14%).

The remaining consumers owning multiple personal email addresses (around half, as seen previously) either simply use multiple emails for personal and marketing messages (18%) or have extraneous old addresses they no longer use (9%).

This shows the importance of ensuring brands have and retain the permission to send to the correct email address. Whether that's the customer's primary, secondary, or tertiary email, marketers should note this behaviour has remained unchanged for multiple years. Consumers, indeed, expect brands messages to be where they want them to be.

However, it will be interesting to see how this behaviour changes as email providers continue to offer new ways to filter brand messages into dedicated areas of the inbox. Long-term this could mean consumers no longer feel the need to maintain a dedicated marketing email address.

Which devices do you use most often to access your personal email address to receive messages from brands you know? (Select all that apply) (Generational split)



Overall, desktop/laptop (64%) and smartphone (62%) are the devices most often used to access personal emails, with one in four using their tablet (25%). While just 6% use their smartwatch and the same proportion use a smart speaker (6%) to access emails. Men appear slightly more likely to use a PC (69%), while women to use their smartphone (66%).

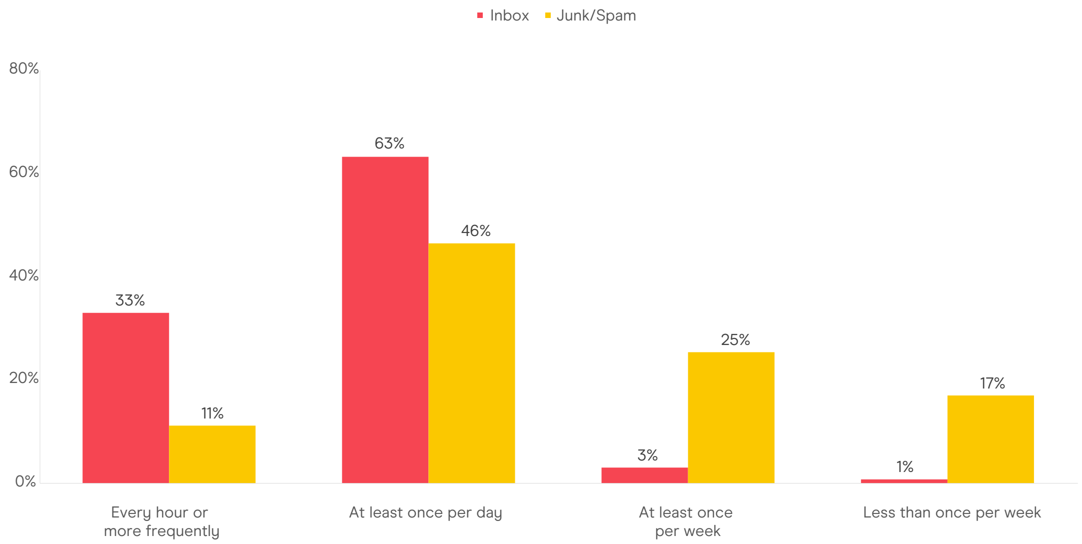
The biggest demographic shifts are found in the generational splits. Younger generations (both Millennials and Gen Z) primarily use their smartphones and occasionally their smartwatches and speakers to engage with brand emails.

These results highlight the increasingly tech-savvy interests and ability these newer generations of customers have, as well as the opportunities to use email to engage them in new and different ways in the future – if these new devices grow in popularity.

/ Account Behaviours and Engagement

In this next section, we will look at how often consumers check their email, as well as how and why they use it to store important information they receive from brands.

How often do you check the main email inbox/'junk' or 'spam' folder of the address you use to receive personal messages?

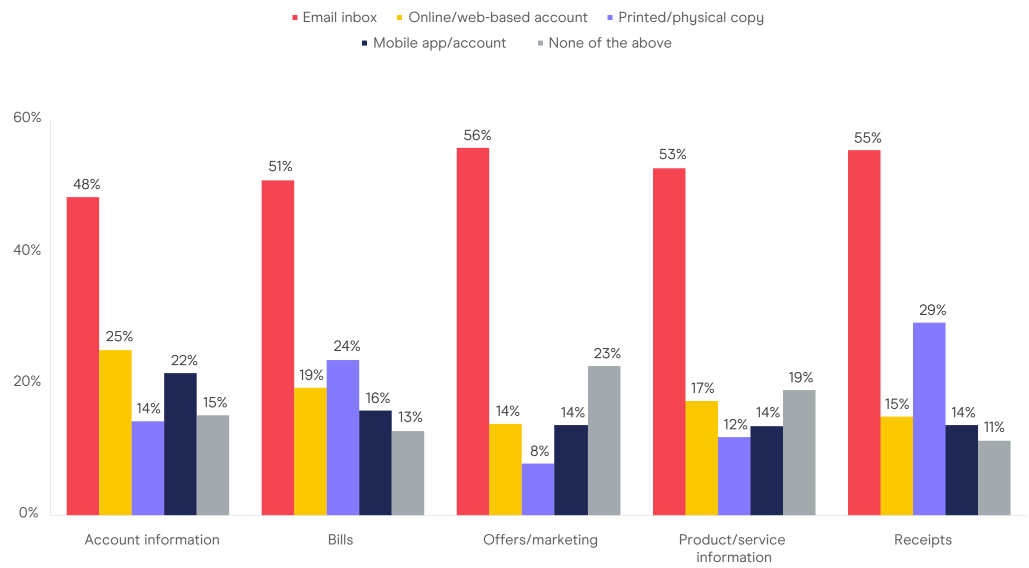


Nearly all people check their personal emails at least daily (96%) – either hourly (33%) or daily (63%) – with 3% checking once a week or more and 1% less often. Gen Z, however, is significantly more likely to only check once a week (9%).

Checking junk/spam folders is less frequent. Although one in ten (11%) still check hourly, the majority check daily (46%) or weekly (25%) – with 17% checking less frequently. Again, Gen Z is less likely to check – less than once per week (31%) whereas Millennials are more likely to check every hour (16%).

As such, whether the emails from brands end up in the inbox or junk/spam folder it's important to make sure these messages stand out. Whether that's through clear branding, personalisation or the subject line, it's only by gaining engagement that brands can then also educate customers to use 'Not spam' options to move them back to the inbox.

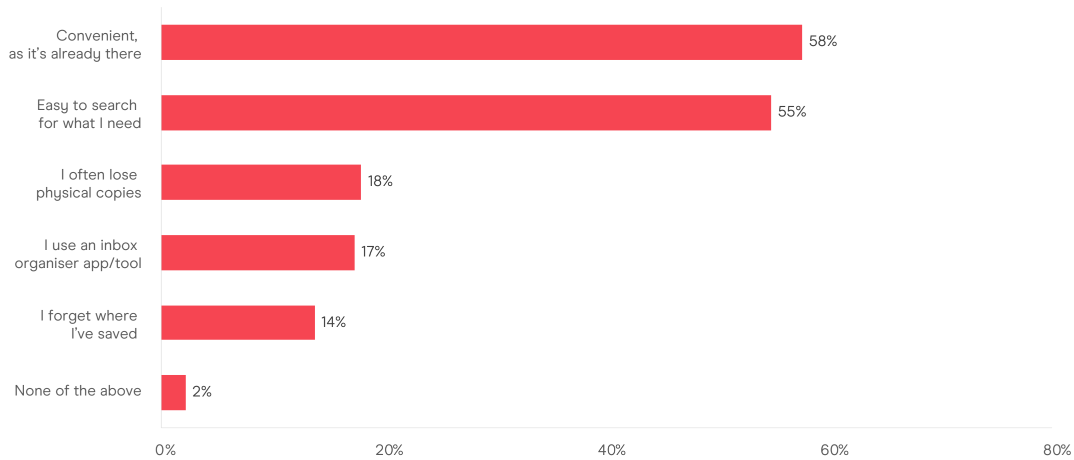
Thinking about where you save or store the following types of information you might receive from a brand, which of the following do you use to keep this? (Select all that apply)



As well as being a popular engagement channel across the customer journey (as seen in the 'Marketing Landscape' chapter), email is also the most popular place to store information sent by brands. Whether that's account information (48%), bills (51%), offers/marketing (56%), product/service information (53%) or receipts (55%), email is significantly preferred to any other option.

Gen X consumers are more likely to use email to save important brand communications, including account information (54%), bills (58%) product/service information (58%) and receipts (63%). Millennials and Gen Z, while still preferring to use email, show a little more interest in using mobile apps or accessible accounts to keep track of key information from brands.

You mentioned you use your email inbox to keep information you receive from brands in your inbox, which of the following would you say are the key reasons you do this? (Select all that apply)



When asked why they use email to store these types of information, the primary drivers were convenience (58%) and the easiness of searching for a piece of information they need later (55%). One in five cite losing physical copies (18%) and this is more often mentioned by Gen Z (31%). This youngest generation is also significantly less likely to cite easy search as a reason to store information in their email (41%).

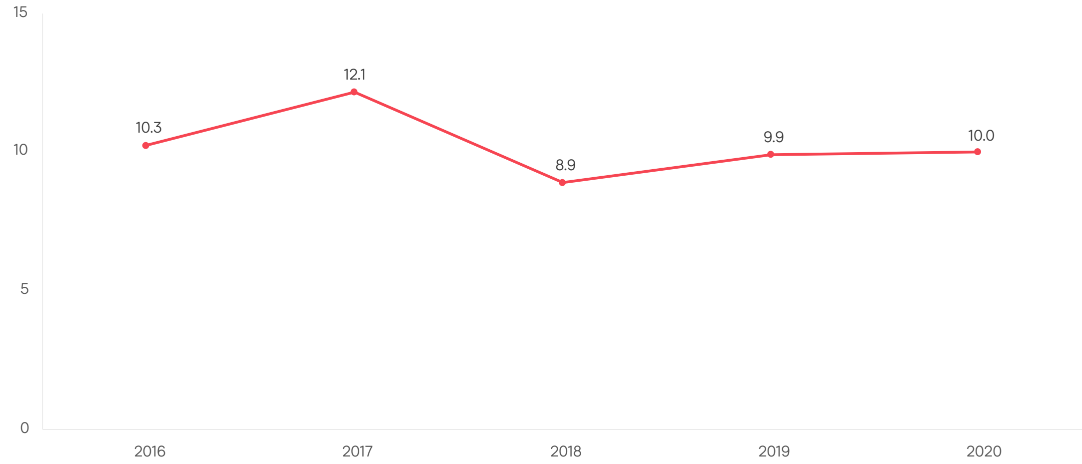
This behaviour and its drivers highlight the continuing evolution of the email inbox.

Email has fast become the historic repository for many consumers, where they can go to find previous brand engagement or messages. The evolution of Gmail's Promotions tab (and others similar) could continue to evolve further into a dedicated space in inboxes to store this type of information – making it even easier to locate later.

/ Receiving and Opening

How many brands are consumer signed-up to receive email from? Why do they sign-up? How many messages do they receive from brands? What proportion for they open and read – and why? These are the questions (and more) we answer in this chapter.

From how many brands/shops/sites are you currently signed up to receive emails on your personal email address(es)?

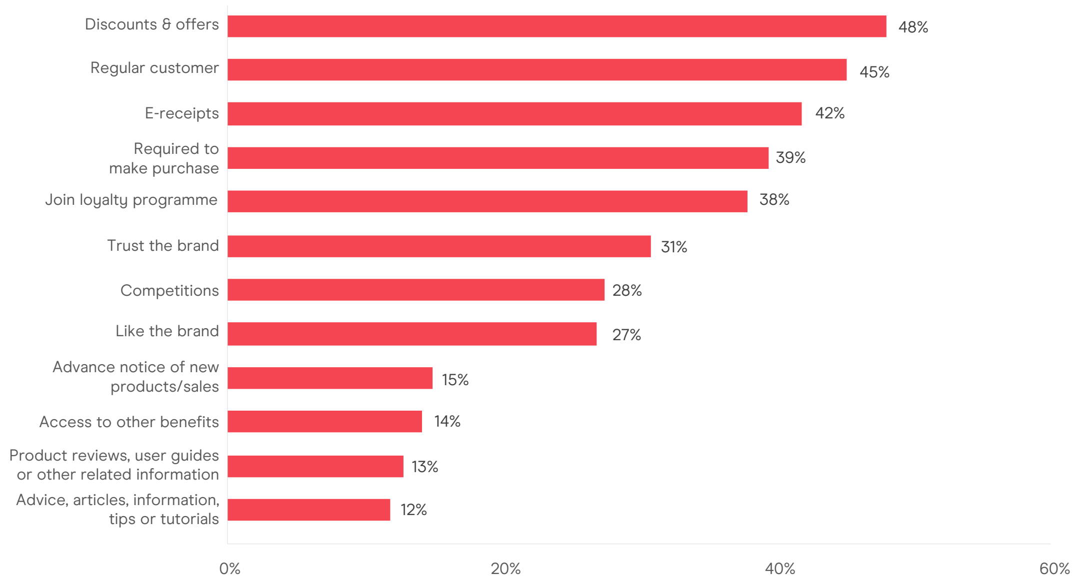


The average number of brands a consumer is signed up to receive email marketing from remains steady at around 10. This has returned to stability in recent years following some fluctuation around the introduction of the GDPR – inextricably linked to the volume of email messages sent to inform customers of the incoming new laws.

Women (10.4) tend to have signed-up to slightly more brand email programmes, compared to men (9.5). Additionally, Gen X are more likely to have signed-up (10.9) while Baby boomers (9.2) and Gen Z less so (8.6) – Millennials are around average (9.8).

Both longitudinally and demographically, these variations are relatively small, highlighting the common feeling among consumers that they have around ten brands they allow into their inbox willingly. Whether this is accurate in the data or not, it does underline the importance of having a strong proposition to both gain and retain access to your customers' inbox. This means combining brand recognition with a clear reason customers should engage with the content you're sending.

What are normally the main reasons you give your email address to a brand? (Select all that apply)



The main driver behind people giving their emails to a brands' is to receive discounts and offers (48%). Beyond this, being a regular customer (45%) or signing up for a loyalty programme (38%) are also key reasons.

Women are more likely to report offering their emails to brands in exchange for discounts and offer (52%) or to join a loyalty programme (41%) compared to men (44% and 35% respectively)

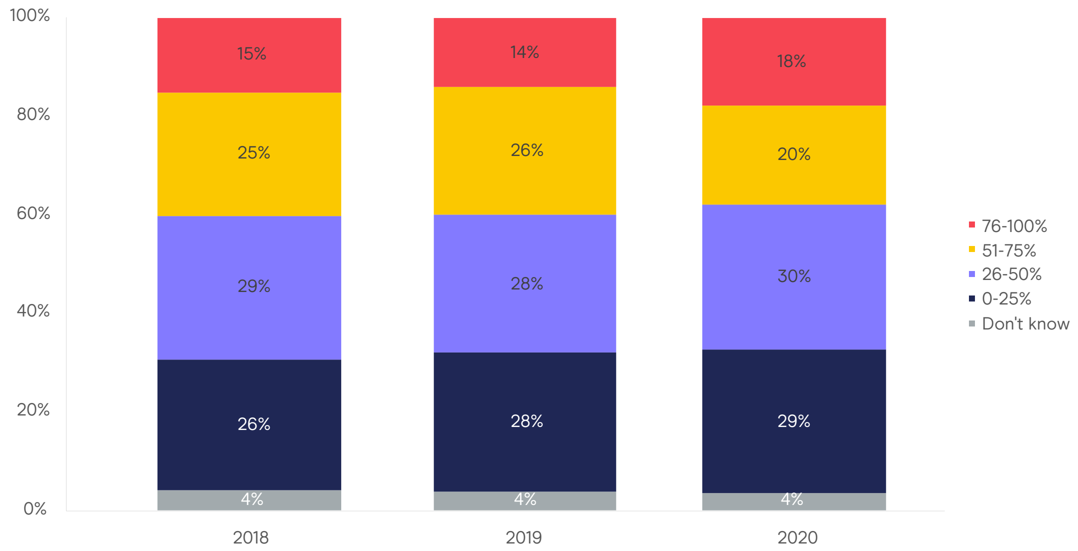
Making a purchase also appears to be important, with many benefitting from being emailed their receipts (42%) – as we saw in the previous 'Email Address Engagement' section – but there may also be several begrudging email subscribers that hand over their addresses as a requirement of making a purchase (39%). These emails are, as such, more likely to be their secondary or tertiary address, rather than their primary one. Therefore, brands must be clear about the reasons for collecting this data, as well as what the customer is signing up to receive – as otherwise, they risk souring the relationship post-purchase.

Generationally, Baby boomers are more likely to cite being a regular customer (55%), a requirement of making a purchase (52%), joining a loyalty scheme (44%) or simply trusting the brand (37%) than any other age group. Gen Z, on the other hand, is significantly more likely to require access to other benefits in exchange for their email (25%).

Almost half of consumers (45%) estimate they receive 2-3 emails per week from the brands they're signed-up to, with a further one in five (18%) believing they just receive one per week. Baby boomers are slightly more likely to believe they receive just one email a week from these brands (24%), while Gen X is more likely to state they receive daily emails (18%).

Encouragingly, just one in four people (23%) say they receive daily emails from brands they have not signed up to receive emails from – with the most (54%) receiving 1-3 per week from unknown brands.

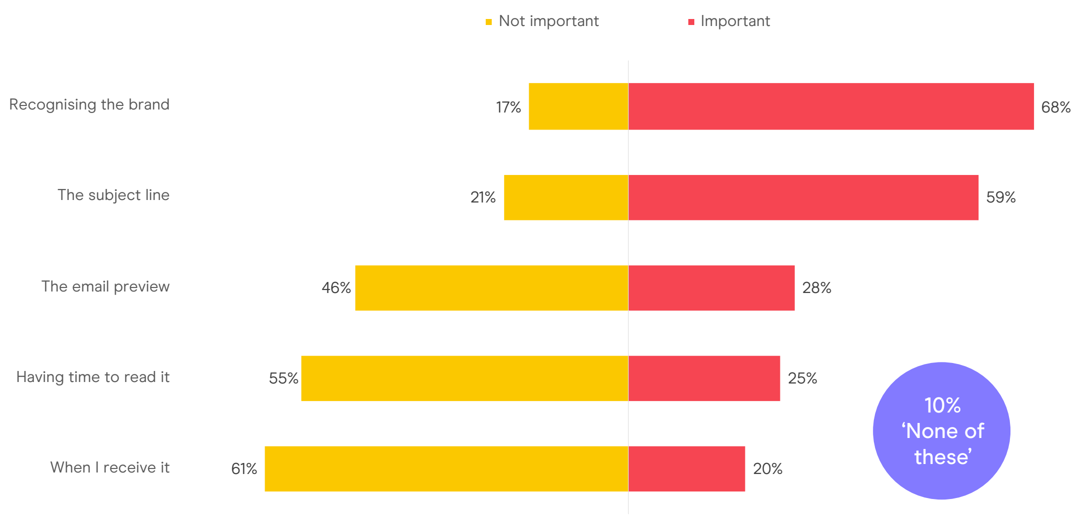
What percentage of emails from brands received in your personal inbox(es) do you think you open and read?



One in five people (18%) estimate they open and read over 75% of the emails they receive – a slight increase on previous years. A similar proportion (20%) estimating they read 50-75% of the messages in their personal inbox, meaning the remaining read less than half of the emails they receive from brands (or don't know).

Baby boomers are more likely to open and read over 75% of the emails they receive (24%), while Gen Z are more likely to engage with under 25% (37%). For brands, this means that they should consider resending important messages or build an email series, to ensure subscribers receive the information they need.

When you receive an email in your personal inbox(es), how important are the following factors for you to open it? (Rank by importance)



The most important factor in opening an email is brand recognition (68%), followed by the subject line (59%). Both have increased since 2019, when they were 55% and 48% respectively, while other factors were seen as less significant.

In fact, one in 10 consumers (10%) reported that none of these factors is important in their decision to open an email, which begs the question: What do they base their decision on? Though this is not something we were able to answer within this year's research.

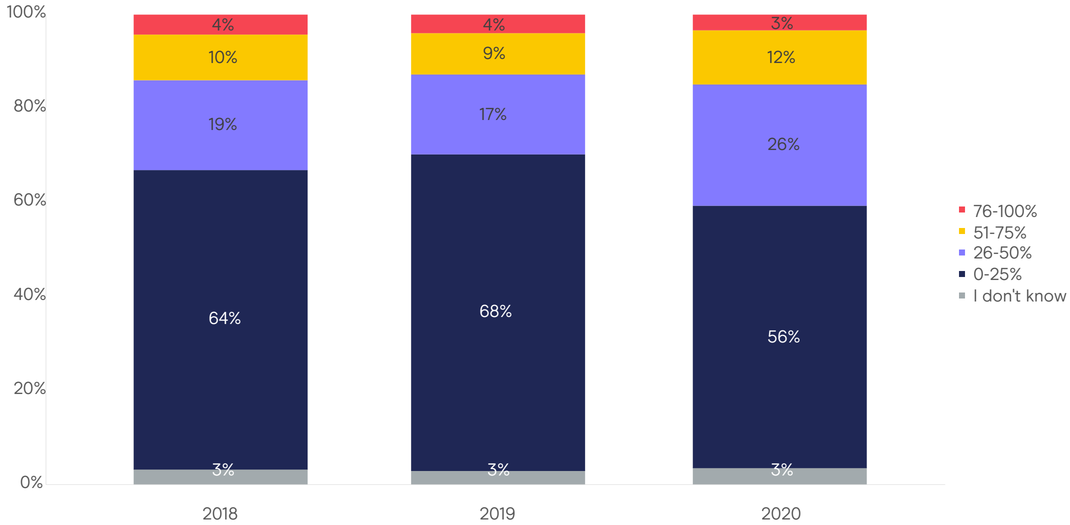
Overall, these rankings point to the renewed importance of brands being recognised, whether that's through consistent referencing of their name as part of the subject line and/or sender name.

There's also the opportunity to use emerging specifications like Brand Indicators for Message Identification (BIMI) to make it easier to get your brands' logo displayed next to your message in the inbox, for providers that support the specification. BIMI can work alongside existing sending identification and verification standards (such as SPF, DMARC, and DKIM), maybe something even easier to implement than what marketers think. Any brands that haven't yet implemented DMARC should, therefore, plan to do so too – both for the security benefits and to be ready for BIMI once it's more widely available.

/ Content and Actions

Next, we investigate the content that consumers like to receive via email, the most likely actions they will take when they receive an interesting email, and the brands they believe are using the channel most effectively. But to begin, we'll understand how useful people believe emails they receive generally are.

What percentage of the emails you open and read from brands do you consider useful to you?



The good news for brands is that consumers show a visible increase in the proportion of brand emails they engage with and find 'useful' – with the number believing this is less than one in four emails falling from 69% in 2019 to 56% this year. However, this still represents half of the respondents, with just one in six (15%) reporting that at least half the emails they receive are useful and a quarter (26%) reporting around 25-50% - which is an increase on 17% last year.

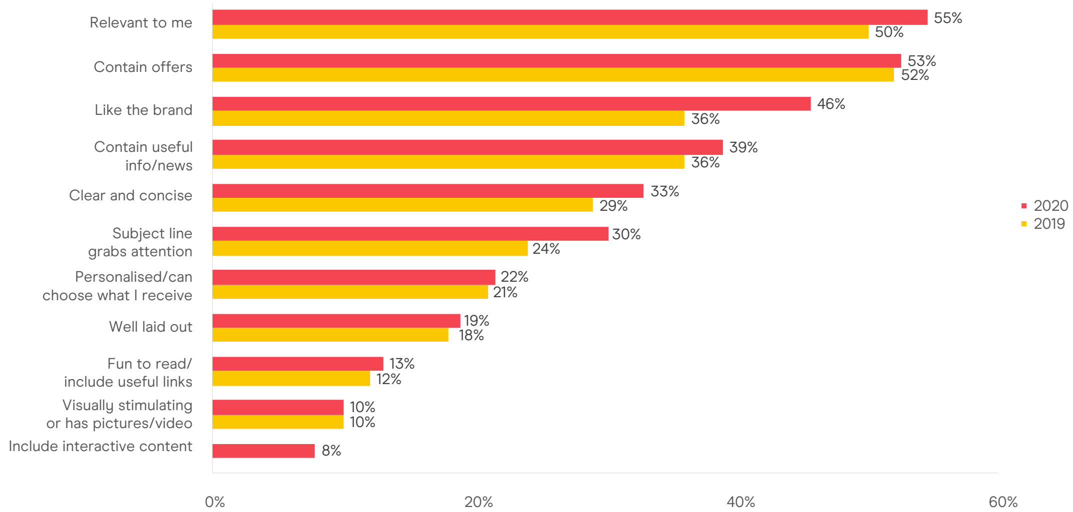
Interestingly, it's also Baby boomers that are leading the feeling of low usefulness, with significantly more believing under one in four are relevant (68%). This is despite this group being the most likely to open and read most of the emails they receive (as seen in the previous chapter), implying they are either less selective about the messages they receive and find less utility as a result. Meanwhile, under half of Millennials and Gen Z consumers agree (44% and 46% respectively), with these more likely to agree around 51-75% of the emails they get are useful (17% and 15% respectively).

Given the volume of messages consumers want and brands send via email (as seen in the 'Marketing Landscape' chapter) it is always challenging to ensure every single one is relevant and useful – before even understanding quite what that means from one person to another.

The additional messages sent amid the coronavirus pandemic to update customers on how businesses are operating within the restrictions imposed by the government has only added to this challenge.

Ultimately, it's an encouraging sign that consumers have found slightly more messages useful – or potentially relevant – compared to previous years. Reinforced by the reasons consumers say they like the emails they receive from brands (below).

Now think about the emails you like to receive from brands, which of the following best describes why you like them? (Select all that apply)



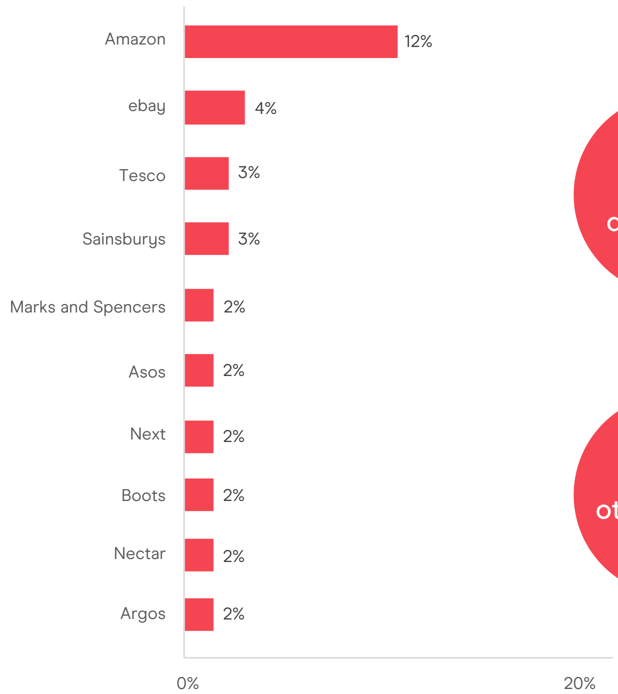
This year, for the first time, relevance (55%) overtook emails containing offers (53%) as the main reason for enjoying the messages they receive from brands. This represents one of the clearest coronavirus-related trends in this year's report, as consumers have prioritised helpful and useful information amid the pandemic – such as changes to opening hours or product availability.

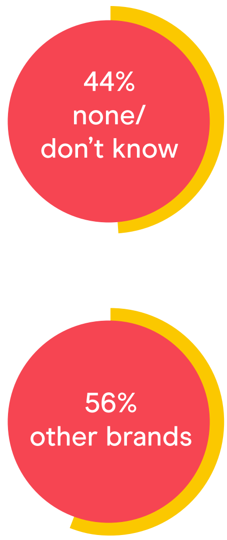
These were also joined by liking the brand (46%) and containing useful content (39%) as the key drivers of email fondness, both of which increased from just over a third (both 36%) in 2019. Women are more likely to value offers (58%) and liking the brand (49%) compared to men (47% and 43%).

Notably, Baby boomers are even more likely to prioritise relevance (65%) and usefulness (50%) – this despite them being more likely to deem less of the emails they receive as 'useful' (as seen previously). This may help to explain this cohort's demand for relevance/usefulness in the emails they receive and that anything that does not meet their high watermark is deemed not to be worthwhile communications.

Also, the younger generations (Millennials and Gen Z) are more likely to value some of the more aesthetic elements of emails – messages that are well laid out (22% and 31% respectively), fun to read (17% and 21%), visually stimulating (13% and 18%), and inclusive of interactive content (both 12%).

Thinking about the emails that you are signed up to receive, which of those brands do you think do email particularly well? For example, which do you always open, find interesting/useful or look forward to receiving? (Name as many as you like)





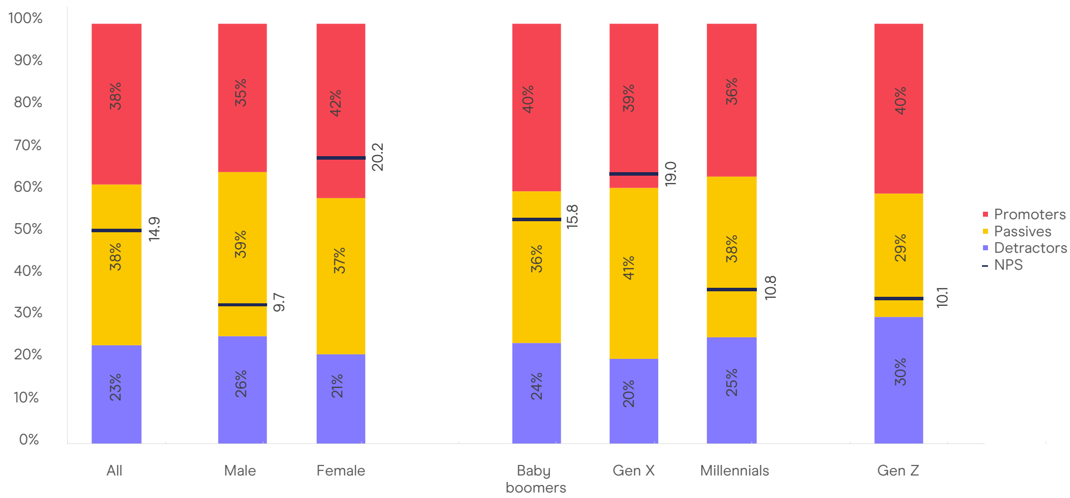
When asked about which brands they believe are utilising the email channel well, Amazon once again tops the list (12%). However, in a year where many have relied on the online retail giant more than ever, it's potentially surprising this lead hasn't extended further.

This is something we also found and discussed further in the latest 'Customer Engagement: How To Win Trust and Loyalty 2020' research where the titan brand was named as customers' favourite brand but showed little increase on previous years of research.

Beyond the tech titans of Amazon (12%) and eBay (4%), a mixture of other retailers makes up the top 10. However, more interesting is that 56% of consumers named one of over 1,200 other brands highlighting the wide range of brands that consumers feel strongly about. Also, big brand names not necessarily being as dominant as we might expect, while relevance and usefulness can be intrinsically linked to liking the brand too.

It's worthwhile noting that 44% of people said they could not name a brand they always open, find interesting/useful or look forward to receiving emails from. While this is a slight increase on 2019 (37%), it's still nowhere near the two-thirds of consumers (69%) it was in 2017 – as such this may well be a result of the additional emails sent by brands because of the pandemic. However, it does still remind of the continued challenge for all brands to successfully engage customers in a way that keeps engagement and loyalty high.

How likely are you to recommend this brand to a friend or colleague?

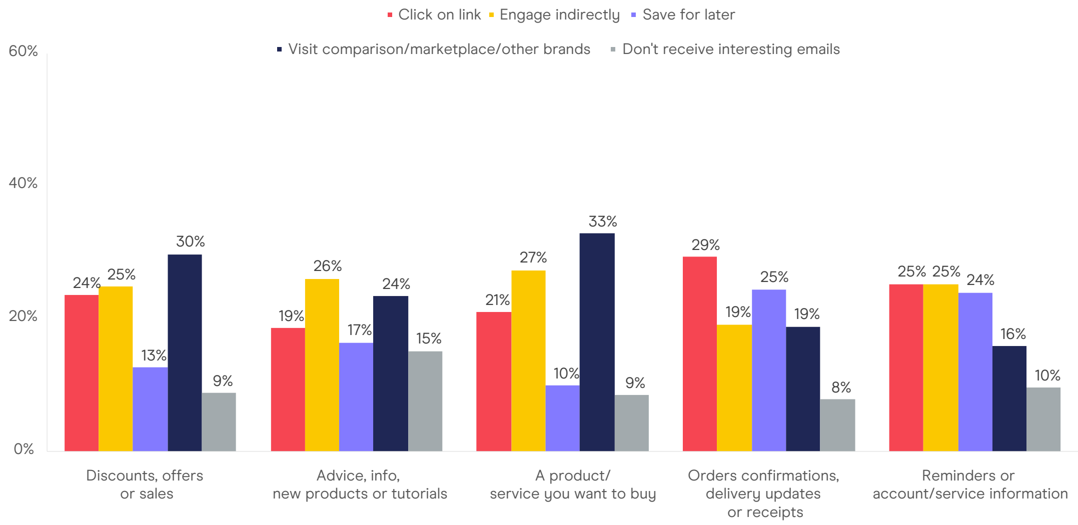


As part of this year's research, when a respondent named a brand they felt did email well, we also asked how likely they would be to recommend it to a friend or colleague. This used a Net Promote Score (NPS) methodology to identify promoter, passive and detractor groups, as well as an NPS score.

Unsurprisingly, these consumers did tend to be in the promoter or passive groups (both 38%) – meaning they scored at least seven out of ten for their likelihood to recommend. However, it's interesting to note that the NPS score for women indicates they are significantly more likely to promote brands they like (20.2) than men (9.7).

Generationally there is a notable change from Gen X (19.0) being more likely to refer brands they like, to Millennials (10.8) and Gen Z (10.1) being less likely. Something for brands to consider if they are developing referral programmes to acquire new customers – something we explored further in 'Referral Marketing: Are You Creating Customer Advocates?'.

After receiving the following types of email that you find interesting, which action are you most likely to take?



This question offered respondents 11 different actions to take when they receive an interesting email, which we have then grouped into five categories as follows:

- **Click on link:** Click on the link
- **Engage indirectly:** Got to company's mobile app/website; Go to company's physical store; Visit company's social media account; Call the company
- **Save for later:** Save email/bear information in mind for later
- **Visit comparison/marketplace/other brands:** Go to competitor's app/physical shop/website; Got to marketplace's app/store/site; Go to comparison/users reviews site; Go to cashback/voucher code site
- **Don't receive interesting emails:** I don't receive interesting emails

This highlights that while clicking on the link is the single most common action across the touchpoints we asked about – with around one in four selecting this (19-29%) – there are many more indirect actions that may be taken. This is particularly true when people receive pre-purchase messages about offers, new products or items they want to buy.

The most popular collection of actions is actually to engage the brand that has emailed you, but not through the email they've sent you (19-27%). For brands using last-click attribution, this highlights a significant flaw in this methodology and potential under-reporting of the impact their email programme may be having.

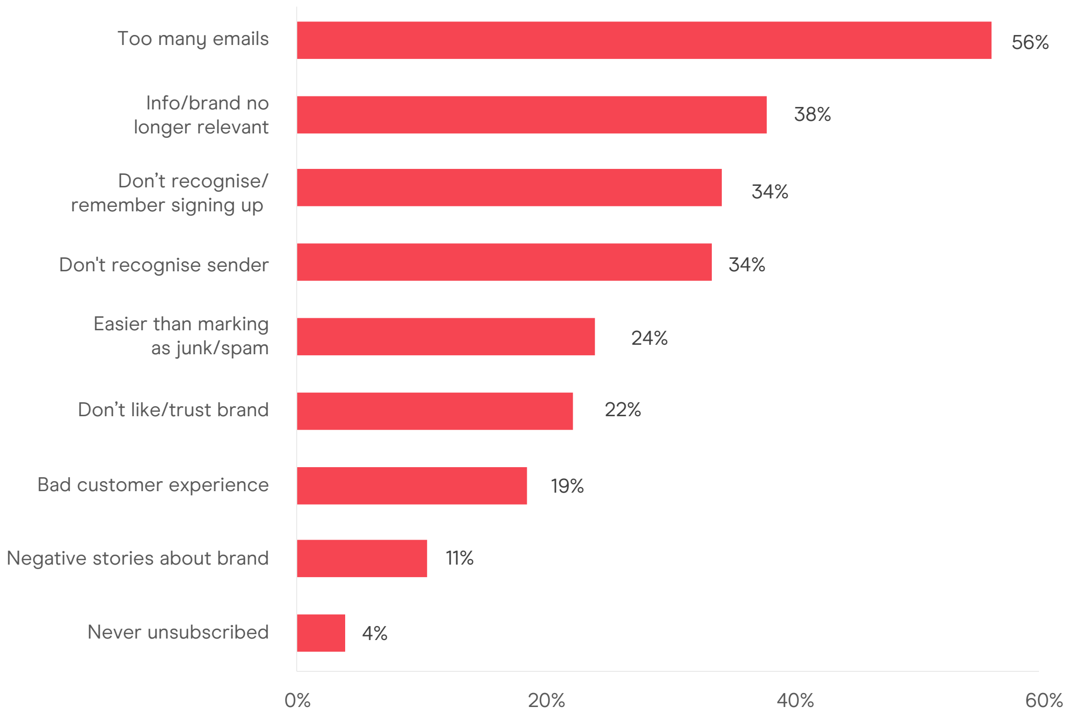
However, it's also notable that when consumers receive these pre-purchase messages they are also more likely to visit another brand altogether (24-33%) – whether that's a competitor, marketplace (such as Amazon), comparison/reviews site or some form of cashback/voucher site. That's not to say these customers won't then return to the original brand, but it does pose another challenge to any attribution model – particularly last-click.

Women are more likely to take immediate action and click the link when they receive an interesting offer or item they want to buy (27% and 24% respectively). Whereas men, on the other hand are less likely to simply click – 21% for offers and 18% for products/services they want to buy.

/ Unsubscribes

To finish, we will delve into the potential end of a brands customer relationship – through email at least. Understanding why people unsubscribe from email programmes and what their expectations are when they do so.

What makes you unsubscribe from a brand's emails? (Select all that apply)

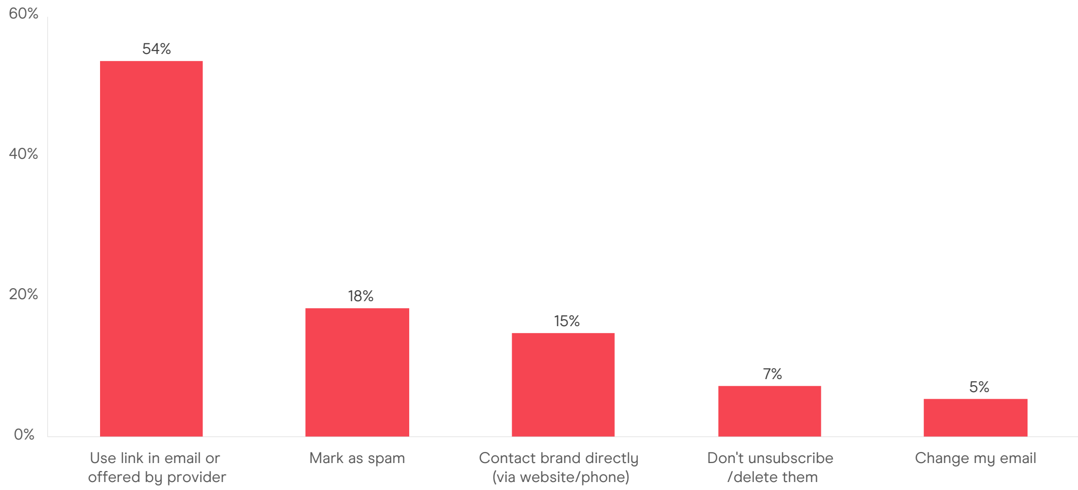


The main reason given for unsubscribing is receiving too many emails from brands (56%), followed by the information or brand no longer being relevant (38%) – although encouragingly this has reduced from 55% in 2017. Around a third of consumers also cite a lack of recognition of the brand or emails they're receiving (both 34%), something marketers have more control over than they may thing – as discussed in the 'Receiving and Opening' chapter already.

Baby boomers are more likely to cite relevance (50%), not remembering signing up (46%) and brand recognition (45%) as the reasons they unsubscribe. Potentially also explaining why these consumers feel they receive more unsolicited emails and generally find less of the messages they receive as useful (see 'Receiving and Opening' and 'Content and Actions' sections).

The issue of not remembering signing up is something brands should aim to re-address, particularly as many may not have since GDPR came into force. Brands should find new ways to reassure and reinforce how or why they signed up to receive emails in the first place.

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

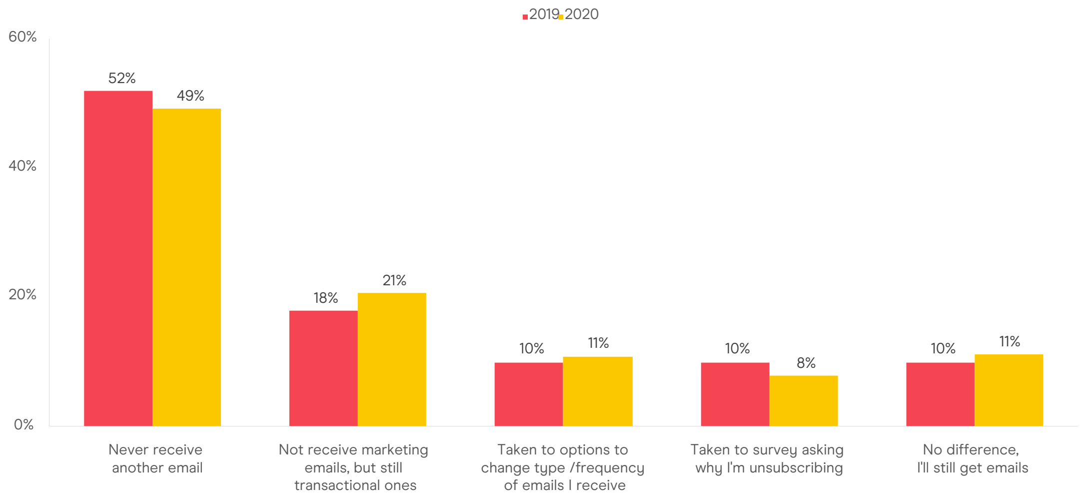


The most popular way to unsubscribe from a brand's email programme is using the link provided (54%), with 15% choosing to contact the brand in another way. One example of this alternative means may be new features within mobile apps for email (such as Yahoo Mail) that allow consumers to see 'active' email subscriptions they currently receive – as well as offering them a simple way to unsubscribe too. However, one in five (18%) still opt to mark unwanted messages as spam.

The impact on email programmes and deliverability, coupled with people's clear awareness of unsubscribe links, means it's even more important for brands to make sure these are well placed. Making them hard to locate or in a weaker font could drive more customers towards the option of using the spam button – the use of which degrades reputation and deliverability. It also misses out on the opportunity to better understand customers preferences or why they're opting out.

Men are slightly more likely to use the spam option (21%) than women (16%), while women appear more willing to use the link provided (57% compared to 51% for men). Meanwhile, Baby boomers are more likely to use the link offered to them (60%) and Gen Z is more likely to take the nuclear option of changing their email entirely (11%) – although this could well be simply down to age as they do not yet have the myriad of important information stored in their email addresses (as discussed in the 'Email Address Behaviour' chapter).

After clicking to unsubscribe from a brand's emails, what do you typically prefer to happen? (Please select one)

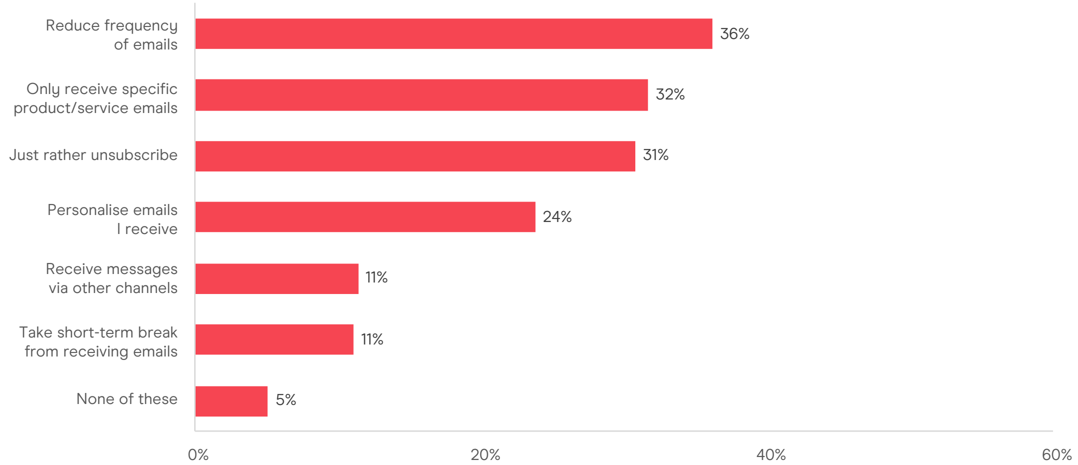


Once they have opted to unsubscribe, half of consumers (49%) expect to never receive another email from a brand – slightly down year-on-year, but not significantly. A fifth of consumers are open to being offered options to either change the emails they receive (11%) or a survey about they're unsubscribing (8%).

Meaning that brands may be missing out on valuable insights and the opportunity to keep that customer engaged with their email programme.

Somewhat concerningly, one in 10 people (11%) continue to believe unsubscribing will stop the emails they receive – this is driven by Millennials (17%). Baby boomers, meanwhile, are significantly more likely to expect to simply never receive another email from a brand (62%) – Millennials (37%) and Gen Z (32%) less so. These two more junior generations also appear more aware and open of the option of preference centres (16% and 18% respectively).

If you were able to manage the communications you receive from brands, which of the following options would you prefer? (Select all that apply)



When offered the chance to manage their emails more closely, most would opt to reduce the frequency (36%), only receive specific messages (32%) or more personalisation (24%) – unsurprising given the reasons for unsubscribing identified at the begging of this chapter.

Around a third of respondents would also simply like to be allowed to unsubscribe (31%) – particularly Baby boomers (43%) and less so Gen Z (14%). Gen Z is also more likely to opt to receive brand messages via another channel (23%) and Millennials to snooze messages for a short period (16%).

Ultimately, highlighting both the opportunity and challenge that even this potential end of the email relationship can contain. Brands must ensure their approach is clear and transparent to allow customers that want to tweak their relationship to have the opportunity to do so, while also allowing those that want to leave the ability to as well.

/ Acknowledgements

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- **Guy Hanson**, Validity International
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- **Saravanan Subburam**, Investment & Pensions Europe (IPE)

/ About the DMA Email Council

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

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

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

Get to know the Email Council here.

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/ Methodology

The 'Consumer Email Tracker 2021' is an annual study undertaken by the DMA, in partnership with Validity and the DMA's Email Council.

The research was conducted in February 2021 via an online survey of 2,026 respondents (nationally representative of UK adults). The data was collected and collated by Dynata, then analysed by the DMA Insight department. The report was written and designed by the DMA Insight department and in-house design team.

The survey consisted of a maximum of 29 questions. These questions were reviewed by the DMA, Validity and the Email Council's Research Hub to ensure relevance to the current state of the email industry. Unless referenced, all data included in this report is taken from this survey.

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

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