Page 16  Email produces ROI which affects budgets
Page 18  Marketers are tracking the standard metrics but may be overlooking some important ones
Page 21  Marketers are integrating email into channels but mobile is presenting a problem
Marketing Sherpa’s Email Marketing Benchmarking Report

Vocus believes in the power of email marketing to engage and retain customers and prospects. As email marketing continues to mature, however, the competition for attention in already-crowded inboxes is increasing.

To improve effectiveness and audience engagement, marketers should take a special interest in the metrics that track the success of their email marketing campaigns. Comparing your performance to industry benchmarks is also a best practice in email marketing effectiveness.

This Marketing Sherpa Benchmarking Report will give you the tactics, benchmarks and in-depth analysis you need to improve your email marketing performance for a higher ROI.

Marketing success today means creating and sharing content through email, search, social, and publicity. Vocus is here to help you deliver. We wish you every marketing success.

Enjoy!

The Vocus Team
2013 Email Marketing Benchmark Report

• The volume and reach of email being sent
• Cultural, technical and regulatory factors that will affect email marketers in the coming year
• The changing perceptions of email marketing in organizations
• The ROI of email as a marketing channel
• Email’s role in, and share of, marketing budgets for 2013
• The primary email goals and challenges facing marketers in the coming year
• Marketers’ involvement with tracking, analyzing and/or reporting email metrics
• The types of email marketing metrics tracked by surveyed organizations
• Average rates for selected email marketing metrics
• The types of automated email messages deployed by organizations
• Email list growth trends from 2012
• Expected email list growth tactics for 2013
• The difficulty and effectiveness for various list growth tactics
• Tactics used to increase and improve email engagement and deliverability
• The effectiveness of different email send times
• Other marketing channels integrated into email programs
• Customers’ mobile email adoption
• Email optimization techniques and testing practices
Use this data to gain approval, win clients, and help fellow marketers

At MarketingSherpa, our goal is to give marketers the instructions, statistics, and inspiration to improve their results. To that end, you are free to share any five (5) charts from this book in presentations to clients, business leadership, and at events as well as in blog posts, videos and other public and private venues, without written permission, as long as you attribute MarketingSherpa and link to MarketingSherpa.com (where applicable).

However, if you would like to use more than five charts, please request written permission from the publisher at research@meclabs.com or (877) 895-1717. Outside the U.S. and Canada, please call (401) 383-3131.
2013 Email Marketing Benchmark Report

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Dear Marketer,

Is email marketing more (or less) effective than social media? How often should I send an email to my prospects? What tactics are working for email list growth? How should I be segmenting my email lists? What are the most effective strategies for email copy?

These are just few of the questions addressed in the new 2013 Email Marketing Benchmark Report. Some of the most compelling findings may surprise you:

- Email produces ROI, which is affecting budgets
- Marketers are tracking the standard email metrics but they may be overlooking some important ones
- Marketers are integrating email with other channels but mobile is presenting a problem

In this 209-page report, our researchers have distilled the most essential insights from more than 1,095 surveys with companies from all over the world. There are 143 charts in total – all of which are designed to arm you with precisely what you need to run successful email marketing campaigns.

We have tried to cover the most pressing questions facing email marketing in 2013. However, we know that there is always more to learn and discover. As you read this book, I would love to hear your suggestions for our next edition. Please send us your thoughts.

Together, we can keep expanding our knowledge of this essential digital medium.

Thank you for your trust,
Flint McGlaughlin

P.S. For me, some of the most compelling findings are on pages 16, 18, and 21.
EXECUTIVE SUMMARY

Takeaway #1 Email is no longer limited to computers and workstations
Takeaway #2 Email produces ROI, which is affecting budgets
Takeaway #3 Marketers are tracking the standard email metrics... but they may be overlooking some important ones
Takeaway #4 Email lists are growing, albeit slowly... and difficulty of list growth tactics may be the culprit
Takeaway #5 Marketers are integrating email with other channels... but mobile is presenting a problem

CHAPTER 1: THE MARKET

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What volume of emails does your organization send in the average month?
Chart 1.1 All responses
Chart 1.2 Manufacturing or Packaged Goods
Chart 1.3 Marketing Agency or Consultancy
Chart 1.4 Media or Publishing
Chart 1.5 Nonprofit and Education
Chart 1.6 Professional or Financial Services
Chart 1.7 Retail or E-commerce
Chart 1.8 Software or Software as a Service
Chart 1.9 Technology Equipment or Hardware
Chart 1.10 Under 100 employees
Chart 1.11 Over 100 employees
Chart 1.12 Business-to-consumer (B2C)
Chart 1.13 By business-to-business/government (B2B and/or B2G)
Chart 1.14 By both B2B and B2C

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What new developments will affect your email marketing program in the next 12 months?
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Chart 1.16 Nonprofit and Education
Chart 1.17 Manufacturing or Packaged Goods
Chart 1.18 Marketing Agency or Consultancy
Chart 1.19 Media or Publishing
Chart 1.20 Retail or E-commerce
Chart 1.21 Software or Software as a Service
Chart 1.22 Technology Equipment or Hardware

New development with greatest overall impact on email marketing
Which new development listed previously will have the most impact on your email marketing program?
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Organization perception of email marketing ROI during budget appropriations
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Chart 1.26 By business-to-business/government (B2B and/or B2G)
Chart 1.27 By both B2B and B2C

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What is the estimated ROI from email marketing programs for your organization?

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Marketing tactics budget forecast

How do you foresee the percentage of your total marketing budget allocated to the following marketing tactics changing over the next year?

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Chart 1.31 Business-to-consumer (B2C)
Chart 1.32 By business-to-business/government (B2B and/or B2G)
Chart 1.33 By both B2B and B2C
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Chart 1.35 Marketing Agency or Consultancy
Chart 1.36 Professional or Financial Services
Chart 1.37 Retail or E-commerce
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Organization email marketing goals

Which goals does your organization want to achieve through email marketing in the next 12 months? Please select all that apply.

Chart 1.39 All responses
Chart 1.40 By business-to-consumer (B2C)
Chart 1.41 By business-to-business/government (B2B and/or B2G)
Chart 1.42 By both B2B and B2C

Barriers to top challenges

What barriers exist to overcoming your top challenges? Please select all that apply.

Chart 1.43 All responses
Chart 1.44 By business-to-consumer (B2C)
Chart 1.45 By business-to-business/government (B2B and/or B2G)

CHAPTER 2: THE MESSAGE

Points to Consider

Individual email metrics involvement

Are you involved with tracking, analyzing or reporting on email metrics for your organization?

Chart 2.1 All responses

Email analytics tracking

Which of the following email marketing metrics does your organization track?

Chart 2.2 All responses
Chart 2.3 Business-to-consumer (B2C)
Chart 2.4 By business-to-business/government (B2B and/or B2G)
Chart 2.5 By both B2B and B2C

Email marketing metrics averages

Please estimate your average rates for the following metrics for ALL of your email marketing communications?

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Chart 2.7 Business-to-consumer (B2C)
Chart 2.8 By business-to-business/government (B2B and/or B2G)
Chart 2.9 By both B2B and B2C
Organizational deployment of automated emails

What type of automated, event-triggered, lifecycle email messages does your organization deploy?

- Chart 2.10: All responses
- Chart 2.11: Business-to-consumer (B2C)
- Chart 2.12: By business-to-business/government (B2B and/or B2G)
- Chart 2.13: By both B2B and B2C
- Chart 2.14: Under 100 employees
- Chart 2.15: Over 100 employees
- Chart 2.16: Marketing Agency or Consultancy

Email message metrics averages

Please estimate your average rates for the following metrics for each type of email message?

- Chart 2.17: All responses

CHAPTER 3: THE MEDIUM

Points to Consider

Email list growth trends

Which statement best describes your organization’s email list growth trend for past 12 months?

- Chart 3.1: All responses
- Chart 3.2: Nonprofit and Education
- Chart 3.3: Marketing Agency or Consultancy
- Chart 3.4: Professional or Financial Services
- Chart 3.5: Retail or E-commerce
- Chart 3.6: Software or Software as a Service

Email list growth tactics

Which of the following tactics is your organization using to drive email list growth? Please select all that apply.

- Chart 3.7: All responses

Email list growth tactics difficulties

Please indicate the degree of DIFFICULTY (time, effort and expense) for each of the email list growth tactics your organization is using.

- Chart 3.12: All responses

Email list growth tactics effectiveness

Please indicate the degree of EFFECTIVENESS for each of the email list growth tactics your organization employs.

- Chart 3.13: All responses

Email list growth tactics difficulty and effectiveness

Please indicate the degree of DIFFICULTY (time, effort and expense) and level of EFFECTIVENESS for each of the email list growth tactics your organization is using.

- Chart 3.14: Email to a friend
- Chart 3.15: Online events
- Chart 3.16: Offline events
- Chart 3.17: Paid search
- Chart 3.18: Co-registration programs
- Chart 3.19: Registration during purchase
- Chart 3.20: Website registration page
- Chart 3.21: Blog registration page
- Chart 3.22: Social media sharing buttons in email
- Chart 3.23: Facebook registration page
**Form data collection**

Which form data do you collect in the registration process for your email program?

- Chart 3.24 All responses
- Chart 3.25 Business-to-consumer (B2C)
- Chart 3.26 Business-to-business (B2B and/or B2G)
- Chart 3.27 By both B2B and B2C

**Effective tactics for registering new email subscribers**

What has been the most effective tactic for your organization to register new email subscribers?

- Chart 3.28 All responses
- Chart 3.29 Business-to-business (B2B and/or B2G)

**Tactics utilized to improve email relevance and engagement**

Which of the following tactics is your organization using to improve the relevance and engagement of email content delivered to subscribers?

- Chart 3.30 All responses
- Chart 3.31 Business-to-consumer (B2C)
- Chart 3.32 Business-to-business (B2B and/or B2G)
- Chart 3.33 By both B2B and B2C

**Subscriber segmentation attributes**

Can you segment subscriber data into separate lists based on the following attributes?

- Chart 3.34 All responses

**Email deliverability improvement tactics**

Which of the following tactics is your organization using to improve deliverability rates?

- Chart 3.35 All responses

**Email deliverability tactics difficulty and effectiveness**

Please indicate the degree of DIFFICULTY (time, effort and expense) and the level of EFFECTIVENESS for each of the email deliverability tactics your organization is using.

- Chart 3.36 Launch reactivation campaigns
- Chart 3.37 Monitor inbox placement rate
- Chart 3.38 Measure and remove hard bounces
- Chart 3.39 Evaluate soft bounces
- Chart 3.40 Remove inactive subscribers
- Chart 3.41 Sign up for feedback loops
- Chart 3.42 Request to be whitelisted
- Chart 3.43 Subscribe to a blacklist monitoring service
- Chart 3.44 Learn reputation score
- Chart 3.45 Authenticate sender ID, SPF, or DKIM

**CHAPTER 4: THE MARKETER**

**Points to Consider**

**Daily email effectiveness**

How effective are emails sent each day of the week?

- Chart 4.1 All responses
- Chart 4.2 Business-to-consumer (B2C)
- Chart 4.3 Business-to-business (B2B and/or B2G)
- Chart 4.4 By both B2B and B2C
- Chart 4.5 Marketing Agency or Consultancy
- Chart 4.6 Professional or Financial Services
- Chart 4.7 Retail or E-commerce
- Chart 4.8 Software or Software as a Service
Email campaign use for customer lifecycle management

Which of the following types of email campaigns does your organization use to manage your customer’s lifecycle? Please select all that apply.

- Chart 4.9 All responses
- Chart 4.10 Business-to-consumer (B2C)
- Chart 4.11 Business-to-business (B2B and/or B2G)
- Chart 4.12 By both B2B and B2C

Marketing channel email integration

Which marketing channels does your organization integrate with your email program?

- Chart 4.13 All responses
- Chart 4.14 Business-to-consumer (B2C)
- Chart 4.15 Business-to-business (B2B and/or B2G)
- Chart 4.16 By both B2B and B2C

Email subscribers utilizing mobile

Approximately what percentage of email subscribers read your organization’s email on mobile phones?

- Chart 4.17 All responses

Mobile email design

Are you designing your emails to render differently on mobile devices?

- Chart 4.18 All responses
- Chart 4.19 Business-to-business (B2B and/or B2G)

Techniques utilized for email optimization

What email optimization techniques were utilized by your organization in 2012? Please select all that apply.

- Chart 4.20 All responses

Email campaign element testing and optimization

Which of the following email campaign elements do you routinely test to optimize performance? Please select all that apply.

- Chart 4.21 All responses
- Chart 4.22 Business-to-consumer (B2C)
- Chart 4.23 Business-to-business (B2B and/or B2G)
- Chart 4.24 By both B2B and B2C

Testing and optimization budget used on email

What percentage of your optimization budget is used to test and optimize emails?

- Chart 4.25 All responses

Testing practices implemented

How routinely does your organization implement the following testing practices?

- Chart 4.26 All responses
- Chart 4.27 Business-to-consumer (B2C)
- Chart 4.28 Business-to-business (B2B and/or B2G)
- Chart 4.29 By both B2B and B2C
- Chart 4.30 Under 100 employees
- Chart 4.31 Over 100 employees
2013 Email Marketing Benchmark Report

Welcome to the 2013 Email Marketing Benchmark Report. Inside, you will find the latest, most thorough collection of email marketing data and insights we’ve offered to date.

As has been discussed numerous times in MarketingSherpa articles, blog posts, Special Reports and Benchmark Reports, email is a venerable tactic that is often dismissed as being too rudimentary for today’s focus on real-time information. Yet, email continues to endure, and even thrive, under such scrutiny, continually proving its worth through better delivery practices, more advanced design, and strategic integration with other channels.

With the growth of HTML-5 video email, more sophisticated triggered sends, and better email implementation into mobile platforms, this “tried and true” tactic is not only surviving, but evolving to serve marketers’ needs.

We are excited to bring you MarketingSherpa’s annual email benchmark study in our new, streamlined PowerPoint presentation format. For those who have not yet experienced these changes in our publications, our goal is to allow you to take these slides and use them for your own email marketing efforts, adapt these findings to your own planning, and make the best possible decisions for your needs.
Additionally, as has become standard in our publications, we have included questions asked by our authors when viewing these charts. We encourage you to answer these questions when reviewing the data, and ask your own in public forums, to broaden the scope of this research, and to better learn from your peers.

We hope you find this streamlined delivery more helpful for your email marketing in the months and years to come. As always, we look forward to hearing about your success.

Best,
The MarketingSherpa Team
Email is no longer limited to computers and workstations

What new developments will affect your email marketing program in the next 12 months? Please select all that apply.

- Pervasiveness of mobile smartphones and tablets: 58%
- Social media: 57%
- Use of engagement metrics by webmail clients to deliver and place messages in users' inboxes: 40%
- Location-based marketing: 29%
- Modifications to privacy policy regulations: 20%
- Gamification of marketing programs: 10%
- Cyber attacks on corporate and ESP subscriber databases: 5%
- Other: 6%

TAKEAWAY #1

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=1,095
Email produces ROI, which is affecting budgets

Which statement best describes your organization's perception of email marketing's ROI (return on investment) at budget time?

- Email marketing is producing a ROI: 60%
- Email marketing will eventually produce a ROI: 32%
- Email marketing is unlikely to produce a ROI: 4%
- Other - Write a response below: 3%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=957

TAKEAWAY #2
Email produces ROI, which is affecting budgets

Which statement best describes your organization’s perception of email marketing’s ROI (return on investment) at budget time?

<table>
<thead>
<tr>
<th>Marketing Channel</th>
<th>Percentage Will Decrease</th>
<th>Percentage Will Not Change</th>
<th>Percentage Will Increase</th>
<th>Not Applicable or Don’t Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email marketing</td>
<td>4%</td>
<td>2%</td>
<td>30%</td>
<td>64%</td>
</tr>
<tr>
<td>Website</td>
<td>5%</td>
<td>2%</td>
<td>24%</td>
<td>69%</td>
</tr>
<tr>
<td>Social media marketing</td>
<td>10%</td>
<td>3%</td>
<td>24%</td>
<td>63%</td>
</tr>
<tr>
<td>SEO/paid search/Google Adwords</td>
<td>12%</td>
<td>4%</td>
<td>26%</td>
<td>58%</td>
</tr>
<tr>
<td>Online display ads</td>
<td>16%</td>
<td>6%</td>
<td>27%</td>
<td>51%</td>
</tr>
<tr>
<td>Live events/tradeshows</td>
<td>23%</td>
<td>12%</td>
<td>39%</td>
<td>26%</td>
</tr>
<tr>
<td>Mobile marketing</td>
<td>25%</td>
<td>2%</td>
<td>26%</td>
<td>48%</td>
</tr>
<tr>
<td>Direct mail</td>
<td>26%</td>
<td>15%</td>
<td>33%</td>
<td>25%</td>
</tr>
<tr>
<td>Print ads</td>
<td>29%</td>
<td>24%</td>
<td>35%</td>
<td>12%</td>
</tr>
<tr>
<td>Teleprospecting</td>
<td>46%</td>
<td>7%</td>
<td>29%</td>
<td>17%</td>
</tr>
<tr>
<td>Place-based advertising</td>
<td>58%</td>
<td>12%</td>
<td>23%</td>
<td>6%</td>
</tr>
<tr>
<td>Television/Radio ads</td>
<td>59%</td>
<td>11%</td>
<td>23%</td>
<td>7%</td>
</tr>
<tr>
<td>Product placement</td>
<td>70%</td>
<td>6%</td>
<td>19%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥821
Marketers are tracking the standard email metrics... but they may be overlooking some important ones

Are you involved with tracking, analyzing or reporting on email metrics for your organization?

- Yes: 83%
- No: 17%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=698
Email lists are growing, albeit slowly... and difficulty of list growth tactics may be the culprit

Which statement best describes your organization's email list growth trend for the past 12 months?

- Very positive, our list is rapidly growing: 17%
- Somewhat positive, our list is slowly growing: 50%
- Neutral, the gains balance out the losses: 26%
- Somewhat negative, our list is slowly shrinking: 6%
- Very negative, our list is rapidly shrinking: 1%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=602

TAKEAWAY #4
Email lists are growing, albeit slowly... and difficulty of list growth tactics may be the culprit

*Please indicate the degree of DIFFICULTY (time, effort and expense) for each of the email list growth tactics your organization is using.*

<table>
<thead>
<tr>
<th>Method</th>
<th>Very easy</th>
<th>Somewhat easy</th>
<th>Somewhat difficult</th>
<th>Very difficult</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website registration page</td>
<td>45%</td>
<td>40%</td>
<td>13%</td>
<td>3%</td>
</tr>
<tr>
<td>Social media sharing buttons in email</td>
<td>49%</td>
<td>37%</td>
<td>12%</td>
<td>3%</td>
</tr>
<tr>
<td>Offline events</td>
<td>19%</td>
<td>40%</td>
<td>35%</td>
<td></td>
</tr>
<tr>
<td>Registration during purchase</td>
<td>50%</td>
<td>40%</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>Online events</td>
<td>28%</td>
<td>41%</td>
<td>29%</td>
<td></td>
</tr>
<tr>
<td>Facebook registration page</td>
<td>29%</td>
<td>45%</td>
<td>24%</td>
<td>2%</td>
</tr>
<tr>
<td>Email to a friend</td>
<td>58%</td>
<td>27%</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>Paid search</td>
<td>16%</td>
<td>44%</td>
<td>36%</td>
<td></td>
</tr>
<tr>
<td>Blog registration page</td>
<td>48%</td>
<td>36%</td>
<td>12%</td>
<td>4%</td>
</tr>
<tr>
<td>Co-registration programs</td>
<td>15%</td>
<td>28%</td>
<td>49%</td>
<td></td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥47
Marketers are integrating email with other channels... but mobile is presenting a problem

Which marketing channels does your organization integrate with your email program?

<table>
<thead>
<tr>
<th>Channel</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website</td>
<td>75%</td>
</tr>
<tr>
<td>Social media</td>
<td>56%</td>
</tr>
<tr>
<td>Events (e.g. tradeshows, webinars)</td>
<td>40%</td>
</tr>
<tr>
<td>Blogs</td>
<td>35%</td>
</tr>
<tr>
<td>SEO/ PPC</td>
<td>31%</td>
</tr>
<tr>
<td>Direct mail</td>
<td>29%</td>
</tr>
<tr>
<td>Mobile</td>
<td>21%</td>
</tr>
<tr>
<td>Print/catalog</td>
<td>16%</td>
</tr>
<tr>
<td>Public relations</td>
<td>15%</td>
</tr>
<tr>
<td>Teleprospecting</td>
<td>13%</td>
</tr>
<tr>
<td>SMS (text)</td>
<td>8%</td>
</tr>
<tr>
<td>In-store advertising</td>
<td>6%</td>
</tr>
<tr>
<td>Broadcast</td>
<td>4%</td>
</tr>
<tr>
<td>Outdoor advertising</td>
<td>2%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=579
Marketers are integrating email with other channels... but mobile is presenting a problem

Are you designing your emails to render differently on mobile devices?

Yes 42%
No 58%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=145
Email Marketing Benchmark Report

CHAPTER 1
THE MARKET
Email marketing may have lost its “luster” thanks to the real-time immediacy of social media, or the ease of use offered by inbound content tactics. But, the data culled from the 2013 Email Marketing Benchmark Survey highlight just how important email is to marketers’ overall strategies for 2013.

As we learned, **marketers are not only focusing strongly on email, but are continuing to learn more about the channel, expand upon their email goals, and allocate more resources to email efforts for 2013 and beyond.**

The 1,095 professional marketers who responded to this year’s Email Marketing Benchmark Survey helped us determine the following:

- The volume and reach of email being sent, by industry and organization size
- Cultural, technical and regulatory factors that will affect email marketers in the coming year
- The changing perceptions of email marketing in organizations
- The ROI of email as a marketing channel
- Email’s role in, and share of, marketing budgets for 2013
- The primary email goals and challenges facing marketers in the coming year
The Market: Points to Consider

**HOW MUCH EMAIL ARE MARKETERS SENDING?**

When asked about email send volume, 40% of surveyed marketers indicated their organizations sent between 1-9,999 emails per month ([Chart 1.1](#)). Another 12% reported they were sending between 1,000,000-9,999,999 emails per month, and 7% reported sending more than 10 million.

Unsurprisingly, larger organizations (more than 100 employees) reported sending more emails than their smaller counterparts, with 27% indicating they send between 100,000-999,999 emails per month, and another 18% delivering between one million and 10 million messages in that same timeframe ([Chart 1.11](#)).

Even with a channel as mature as email, **marketers are still somewhat divided about the best way to use it to engage customers.** When asked about their email objectives for the coming year, one respondent said, “Continuing the revamp of our email marketing program. We've taken it a long way, from sending out blindly to a large, unsegmented list, to segmenting based on user-action/behavior/sales process. We're continuing to test and improve upon the advances we've made.”

Another anonymous respondent seemed more concerned with driving list growth, writing that the company’s goal was to, “Get more people to know our products and to our website. Get them to fill out a form (more detailed info on them) and request additional information.”
The Market: Points to Consider

Points to Consider
How many emails does your organization send per month, and what are the greatest influences on your email volume? Have you found that larger distribution has benefited your efforts? How has email volume affected your unsubscribe and deliverability rates? Do you anticipate an increase or decrease in your send volume in the coming year? How much pressure do you get from others in your organization (i.e., outside of Marketing) about your email marketing policies or practices?

What new developments will affect email marketers in 2013?
As most of us have recognized by now, email is no longer limited to computers or workstations. With the continued rise in the use of mobile devices as primary email clients, is it any surprise that the pervasiveness of mobile devices was foremost in marketers’ minds (58%) for 2013 (Chart 1.15)?

Regarding mobile marketing, one respondent said, “All of our email designs and strategies will need to be revamped for mobile compatibility. We are also launching new mobile campaigns in conjunction with our mobile websites and apps.”
The Market: Points to Consider

Social media and webmail engagement metrics were expected to be similarly important, with 57% and 40% of respondents citing these factors, respectively. Notably, **there were several business sectors that saw social media as having the most potential impact on their future email success.**

In the education, association or nonprofit categories, 71% of respondents cited social media as the top factor (Chart 1.16); 60% of media or publishing marketers (Chart 1.19) 55% of software or SaaS marketers (Chart 1.21) and 52% of technology equipment or hardware marketers (Chart 1.22) felt similarly.

One anonymous surveyed marketer said, “Social media is my primary communication tool, and the main way I engage with consumers. **Changes in the social media world will affect who I target and how I target them when it comes to my email campaigns.** It's also important to be able to share the emails when sent.”

Also notable is the relatively low number of marketers who indicated privacy and safety concerns as an impactful development. **Of the 1,095 marketers surveyed, just 20% cited “modifications to privacy policy regulations” as a key concern for the coming year,** while even fewer (5%) thought “Cyber attacks on corporate and ESP subscriber databases” would be a core concern (Chart 1.15).
Interestingly, the only two industry sub-categories that varied significantly from these figures were “Manufacturing, Construction or Packaged Goods,” for whom they were of somewhat greater concern, and “Retail, E-commerce or Wholesale Distribution,” for whom they were significantly lower, with just 1% of respondents citing “Cyber attacks...” as an important development.

Points to Consider
Has consideration of mobile factors affected the way you design your email messages, and the campaigns behind them? How about social media integration with email? Given the relative immaturity of both social and mobile as email marketing factors, are you concerned about differences in the levels of safety and privacy protection of these email client platforms?

HOW WELL IS EMAIL MARKETING PRODUCING ROI, AND IS IT AFFECTING BUDGETS?
Overwhelmingly, respondents believe email marketing is perceived by their organizations as a producer of strong ROI, with 60% indicating so, while just 4% believe email is “unlikely” to do so (Chart 1.24).

In fact, when asked to estimate their email programs’ return on investment, our surveyed marketers claimed an average ROI of 119% (Chart 1.29), with B2B and/or B2G marketers claiming the highest return at 127% (Chart 1.29).
The Market: Points to Consider

A notable disparity was found when breaking down this data by overall email volume. According to our respondents, organizations that sent more than 100,000 emails per month estimated a 94% average ROI, while those who sent fewer than 100,000 messages per month averaged 139% (Chart 1.29).

When we asked respondents how they believed budget allocations would shift for 2013, 64% indicated their organizations’ investment in email marketing was expected to increase. While more marketers cited the website as a focal point for increased spend (69%), more marketers planned to increase spending on email than on search (58%) or online advertising (51%) (Chart 1.30).

Points to Consider
Have you experienced ROI for your email spends similar to these? To what would you attribute any substantial differences? Have you noticed any discernible patterns of ROI that you’d attribute mostly to the number of messages sent?
The Market: Points to Consider

WHAT ARE MARKETERS’ GOALS — AND BARRIERS — FOR SUCCESSFUL EMAIL MARKETING IN 2013?

As a collective group, our respondents indicated a wide, fairly evenly distributed range of goals for their upcoming email programs. When asked which goals their organizations want to achieve through email marketing in the next 12 months, no one category was selected by more than 67%, and no fewer than 38%, by our surveyed marketers.

In fact, the top three selections — “Deliver highly relevant content,” “Drive additional traffic to our website,” and “Increase sales conversion and/or revenue” — were chosen by two-thirds (67%) of our respondents (Chart 1.39).

When analyzed by category, many of the goals selected were unsurprising, as B2C marketers were most focused on increasing sales conversion (73%), growing and retaining subscribers (71%) and driving additional traffic to their websites (70%) (Chart 1.40).

Their B2B and/or B2G counterparts were most focused on relevant content delivery (68%) and lead generation (67%). Prospect nurturing and brand awareness (62% each) were also commonly cited goals (Chart 1.41).
The Market: Points to Consider

To this end, one surveyed marketer stated a key goal to be, “Accelerate the sales readiness of leads while engaging with the leads on behalf of the lead owner. This way the relationship is already established and the email touches can focus on sending information to the lead as a 'trusted adviser' to move them through the buyer's journey.”

It’s interesting, in that context, that “qualify leads” was selected as a primary goal for 2013 by only 47% of respondents from the B2B and/or B2G category (Chart 1.41).

What is the greatest challenge professional marketers currently face in achieving their goals? By far (11%; the greatest margin between two adjacent), “Inadequate staffing resources and expertise” was the biggest barrier to success cited by surveyed marketers (52%) (Chart 1.43).

Interestingly, this was a concern for a greater percentage of marketers from organizations with more than 100 employees (59%) than those with 100 or fewer employees (47%) (Chart 1.47).

The barrier to success that ranked second only to inadequate staffing and resources overall was “Difficulty merging email data with other systems” (42%) (Chart 1.43).
The Market: Points to Consider

In Chapter 4 - The Medium, we’ll unpack this issue further by exploring the nature and magnitude of difficulties with instrumentation and technology.

Sometimes, even if you do have the resources, it appears problems can still arise from a lack of understanding, as illustrated by this comment: “My biggest challenge is dealing with fellow employees. They all want to email lists of thousands without any regard for consequences when you email that many people without having any prior relationship with them. Education is important moving forward.”
Chart 1.1 Volume of emails sent in average month

What volume of emails does your organization send in the average month?

- 1 - 9,999: 40%
- 10,000 - 99,999: 21%
- 100,000 - 999,999: 20%
- 1,000,000 - 9,999,999: 12%
- More than 10 million: 7%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=1095
Chart 1.2 Volume of emails sent in average month

What volume of emails does your organization send in the average month?

- 1 - 9,999: 54%
- 10,000 - 99,999: 25%
- 100,000 - 999,999: 15%
- 1,000,000 - 9,999,999: 6%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=72
Chart 1.3 Volume of emails sent in average month

What volume of emails does your organization send in the average month?

- 1 - 9,999: 49%
- 10,000 - 99,999: 22%
- 100,000 - 999,999: 15%
- 1,000,000 - 9,999,999: 9%
- More than 10 million: 5%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=255
Chart 1.4 Volume of emails sent in average month

What volume of emails does your organization send in the average month?

<table>
<thead>
<tr>
<th>Volume Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - 9,999</td>
<td>26%</td>
</tr>
<tr>
<td>10,000 - 99,999</td>
<td>15%</td>
</tr>
<tr>
<td>100,000 - 999,999</td>
<td>24%</td>
</tr>
<tr>
<td>1,000,000 - 9,999,999</td>
<td>20%</td>
</tr>
<tr>
<td>More than 10 million</td>
<td>16%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=82
Chart 1.5 Volume of emails sent in average month

What volume of emails does your organization send in the average month?

- **1 - 9,999**: 42%
- **10,000 - 99,999**: 29%
- **100,000 - 999,999**: 24%
- **1,000,000 - 9,999,999**: 4%
- **More than 10 million**: 1%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=97
Chart 1.6 Volume of emails sent in average month

What volume of emails does your organization send in the average month?

- 1 - 9,999: 41%
- 10,000 - 99,999: 23%
- 100,000 - 999,999: 20%
- 1,000,000 - 9,999,999: 11%
- More than 10 million: 5%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=128
Chart 1.7 Volume of emails sent in average month

What volume of emails does your organization send in the average month?

- 1 - 9,999: 29%
- 10,000 - 99,999: 14%
- 100,000 - 999,999: 20%
- 1,000,000 - 9,999,999: 22%
- More than 10 million: 15%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=138
Chart 1.8 Volume of emails sent in average month

What volume of emails does your organization send in the average month?

- 1 - 9,999: 37%
- 10,000 - 99,999: 26%
- 100,000 - 999,999: 20%
- 1,000,000 - 9,999,999: 12%
- More than 10 million: 5%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=150
Chart 1.9 Volume of emails sent in average month

What volume of emails does your organization send in the average month?

- 1 - 9,999: 34%
- 10,000 - 99,999: 25%
- 100,000 - 999,999: 29%
- 1,000,000 - 9,999,999: 7%
- More than 10 million: 5%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=56
Chart 1.10 Volume of emails sent in average month

What volume of emails does your organization send in the average month?

- 1 - 9,999: 52%
- 10,000 - 99,999: 23%
- 100,000 - 999,999: 14%
- 1,000,000 - 9,999,999: 8%
- More than 10 million: 3%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=625
Chart 1.11 Volume of emails sent in average month

What volume of emails does your organization send in the average month?

- 1 - 9,999: 24%
- 1,000,000 - 9,999,999: 18%
- 10,000 - 99,999: 19%
- 100,000 - 999,999: 27%
- More than 10 million: 12%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=466
Chart 1.12 Volume of emails sent in average month

What volume of emails does your organization send in the average month?

- 1 - 9,999: 31%
- 10,000 - 99,999: 13%
- 100,000 - 999,999: 20%
- 1,000,000 - 9,999,999: 22%
- More than 10 million: 14%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=225
Chart 1.13 Volume of emails sent in average month

What volume of emails does your organization send in the average month?

- 1 - 9,999: 52%
- 10,000 - 99,999: 23%
- 100,000 - 999,999: 14%
- 1,000,000 - 9,999,999: 8%
- More than 10 million: 3%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=594
Chart 1.14 Volume of emails sent in average month

What volume of emails does your organization send in the average month?

- 1 - 9,999: 52%
- 10,000 - 99,999: 23%
- 100,000 - 999,999: 14%
- 1,000,000 - 9,999,999: 8%
- More than 10 million: 3%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=254
Chart 1.15 New developments affecting email marketing programs

What new developments will affect your email marketing program in the next 12 months? Please select all that apply.

- Pervasiveness of mobile smartphones and tablets: 58%
- Social media: 57%
- Use of engagement metrics by webmail clients to deliver and place messages in users' inboxes: 40%
- Location-based marketing: 29%
- Modifications to privacy policy regulations: 20%
- Gamification of marketing programs: 10%
- Cyber attacks on corporate and ESP subscriber databases: 5%
- Other: 6%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=1,095
Chart 1.16 New developments affecting email marketing programs

What new developments will affect your email marketing program in the next 12 months? Please select all that apply.

- Pervasiveness of mobile smartphones and tablets: 64%
- Social media: 71%
- Use of engagement metrics by webmail clients to deliver and place messages in users' inboxes: 45%
- Location-based marketing: 27%
- Modifications to privacy policy regulations: 15%
- Gamification of marketing programs: 6%
- Cyber attacks on corporate and ESP subscriber databases: 5%
- Other: 8%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=97
Chart 1.17 New developments affecting email marketing programs

What new developments will affect your email marketing program in the next 12 months? Please select all that apply.

- Pervasiveness of mobile smartphones and tablets: 46%
- Social media: 38%
- Use of engagement metrics by webmail clients to deliver and place messages in users’ inboxes: 39%
- Location-based marketing: 18%
- Modifications to privacy policy regulations: 22%
- Gamification of marketing programs: 6%
- Cyber attacks on corporate and ESP subscriber databases: 7%
- Other: 7%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=72
Chart 1.18 New developments affecting email marketing programs

What new developments will affect your email marketing program in the next 12 months? Please select all that apply.

- Pervasiveness of mobile smartphones and tablets: 65%
- Social media: 64%
- Use of engagement metrics by webmail clients to deliver and place messages in users' inboxes: 40%
- Location-based marketing: 31%
- Modifications to privacy policy regulations: 20%
- Gamification of marketing programs: 11%
- Cyber attacks on corporate and ESP subscriber databases: 5%
- Other: 1%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=255
Chart 1.19 New developments affecting email marketing programs

What new developments will affect your email marketing program in the next 12 months? Please select all that apply.

- Pervasiveness of mobile smartphones and tablets: 59%
- Social media: 60%
- Use of engagement metrics by webmail clients to deliver and place messages in users' inboxes: 50%
- Location-based marketing: 32%
- Modifications to privacy policy regulations: 22%
- Gamification of marketing programs: 15%
- Cyber attacks on corporate and ESP subscriber databases: 5%
- Other: 6%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey Methodology: Fielded December 2012, N=82
Chart 1.20 New developments affecting email marketing programs

What new developments will affect your email marketing program in the next 12 months? Please select all that apply.

- Pervasiveness of mobile smartphones and tablets: 59%
- Social media: 51%
- Use of engagement metrics by webmail clients to deliver and place messages in users' inboxes: 43%
- Location-based marketing: 25%
- Modifications to privacy policy regulations: 17%
- Gamification of marketing programs: 12%
- Cyber attacks on corporate and ESP subscriber databases: 1%
- Other: 9%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=138
Chart 1.21 New developments affecting email marketing programs

What new developments will affect your email marketing program in the next 12 months? Please select all that apply.

- Pervasiveness of mobile smartphones and tablets: 53%
- Social media: 55%
- Use of engagement metrics by webmail clients to deliver and place messages in users' inboxes: 36%
- Location-based marketing: 28%
- Modifications to privacy policy regulations: 23%
- Gamification of marketing programs: 11%
- Cyber attacks on corporate and ESP subscriber databases: 3%
- Other: 7%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=150
Chart 1.22 New developments affecting email marketing programs

What new developments will affect your email marketing program in the next 12 months? Please select all that apply.

- Pervasiveness of mobile smartphones and tablets: 50%
- Social media: 52%
- Use of engagement metrics by webmail clients to deliver and place messages in users' inboxes: 30%
- Location-based marketing: 30%
- Modifications to privacy policy regulations: 23%
- Gamification of marketing programs: 11%
- Cyber attacks on corporate and ESP subscriber databases: 5%
- Other: 9%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=56
Chart 1.23 New development with greatest impact on email marketing

Which new development listed previously will have the most impact on your email marketing program?

- Pervasiveness of mobile smartphones and tablets: 36%
- Social media: 22%
- Use of engagement metrics by webmail clients to deliver and place messages in users’ inboxes: 21%
- Location-based marketing: 9%
- Modifications to privacy policy regulations: 5%
- Other: 5%
- Gamification of marketing programs: 2%
- Cyber attacks on corporate and ESP subscriber databases: 1%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=871
Which statement best describes your organization’s perception of email marketing’s ROI (return on investment) at budget time?

- Email marketing is producing a ROI: 60%
- Email marketing will eventually produce a ROI: 32%
- Email marketing is unlikely to produce a ROI: 4%
- Other - Write a response below: 3%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=957
Chart 1.25 Organization perception of email marketing ROI during budget appropriations

Which statement best describes your organization’s perception of email marketing’s ROI (return on investment) at budget time?

- Email marketing is producing a ROI [70%]
- Email marketing will eventually produce a ROI [25%]
- Email marketing is unlikely to produce a ROI [3%]
- Other - Write a response below [2%]

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=190
### Chart 1.26 Organization perception of email marketing ROI during budget appropriations

Which statement best describes your organization's perception of email marketing's ROI (return on investment) at budget time?

<table>
<thead>
<tr>
<th>Perception</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email marketing is producing a ROI</td>
<td>56%</td>
</tr>
<tr>
<td>Email marketing will eventually produce a ROI</td>
<td>35%</td>
</tr>
<tr>
<td>Email marketing is unlikely to produce a ROI</td>
<td>5%</td>
</tr>
<tr>
<td>Other - Write a response below</td>
<td>4%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=488
Chart 1.27 Organization perception of email marketing ROI during budget appropriations

Which statement best describes your organization's perception of email marketing's ROI (return on investment) at budget time?

- Email marketing is producing a ROI: 62%
- Email marketing will eventually produce a ROI: 32%
- Email marketing is unlikely to produce a ROI: 3%
- Other - Write a response below: 4%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=197
Chart 1.28 CMO perspective on value factors in email marketing programs

As CMO or the senior marketing executive in your organization, how important are the following factors in helping you determine and communicate the value of email marketing programs?

- **A/B split or multivariate test results on email and landing pages**
  - Very unimportant: 3%
  - Somewhat unimportant: 5%
  - Somewhat important: 41%
  - Very important: 46%

- **Email performance metrics like opens, clickthroughs and bounce rates**
  - Very unimportant: 2%
  - Somewhat unimportant: 7%
  - Somewhat important: 26%
  - Very important: 51%

- **Financial return on investment**
  - Very unimportant: 2%
  - Somewhat unimportant: 5%
  - Somewhat important: 68%
  - Very important: 78%

- **Post-click metrics like lead generation and sales conversion**
  - Very unimportant: 2%
  - Somewhat unimportant: 2%
  - Somewhat important: 5%
  - Very important: 31%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=280
Chart 1.29 Estimated ROI from email marketing programs

What is the estimated ROI from email marketing programs for your organization?

Overall
B2C
B2B and/or B2G
Both B2B and B2C
Over 100,000 emails per month
Under 100,000 emails per month

119%
114%
127%
108%
94%
139%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥42
**Chart 1.30 Marketing tactics budget forecast**

How do you foresee the percentage of your total marketing budget allocated to the following marketing tactics changing over the next year?

<table>
<thead>
<tr>
<th>Marketing tactic</th>
<th>Percentage will decrease</th>
<th>Percentage will not change</th>
<th>Percentage will increase</th>
<th>Not applicable or don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email marketing</td>
<td>4%</td>
<td>30%</td>
<td>64%</td>
<td>2%</td>
</tr>
<tr>
<td>Website</td>
<td>5%</td>
<td>24%</td>
<td>69%</td>
<td>2%</td>
</tr>
<tr>
<td>Social media marketing</td>
<td>10%</td>
<td>24%</td>
<td>63%</td>
<td>3%</td>
</tr>
<tr>
<td>SEO/paid search/Google Adwords</td>
<td>12%</td>
<td>26%</td>
<td>58%</td>
<td>4%</td>
</tr>
<tr>
<td>Online display ads</td>
<td>16%</td>
<td>27%</td>
<td>51%</td>
<td>6%</td>
</tr>
<tr>
<td>Live events/tradeshows</td>
<td>23%</td>
<td>39%</td>
<td>26%</td>
<td>12%</td>
</tr>
<tr>
<td>Mobile marketing</td>
<td>25%</td>
<td>26%</td>
<td>48%</td>
<td>2%</td>
</tr>
<tr>
<td>Direct mail</td>
<td>26%</td>
<td>33%</td>
<td>25%</td>
<td>15%</td>
</tr>
<tr>
<td>Print ads</td>
<td>29%</td>
<td>24%</td>
<td>35%</td>
<td>12%</td>
</tr>
<tr>
<td>Teleprospecting</td>
<td>46%</td>
<td>7%</td>
<td>29%</td>
<td>17%</td>
</tr>
<tr>
<td>Place-based advertising</td>
<td>58%</td>
<td>12%</td>
<td>23%</td>
<td>6%</td>
</tr>
<tr>
<td>Television/Radio ads</td>
<td>59%</td>
<td>11%</td>
<td>23%</td>
<td>7%</td>
</tr>
<tr>
<td>Product placement</td>
<td>70%</td>
<td>6%</td>
<td>19%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥821
### Chart 1.31 Marketing tactics budget forecast

How do you foresee the percentage of your total marketing budget allocated to the following marketing tactics changing over the next year? **B2C**

<table>
<thead>
<tr>
<th>Marketing Tactics</th>
<th>Percentage will decrease</th>
<th>Percentage will not change</th>
<th>Percentage will increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email marketing</td>
<td>4%</td>
<td>1%</td>
<td>22%</td>
</tr>
<tr>
<td>Website</td>
<td>6%</td>
<td>1%</td>
<td>17%</td>
</tr>
<tr>
<td>Social media marketing</td>
<td>7%</td>
<td>1%</td>
<td>24%</td>
</tr>
<tr>
<td>SEO/paid search/Google Adwords</td>
<td>7%</td>
<td>2%</td>
<td>23%</td>
</tr>
<tr>
<td>Online display ads</td>
<td>11%</td>
<td>6%</td>
<td>19%</td>
</tr>
<tr>
<td>Live events/tradeshows</td>
<td>44%</td>
<td>8%</td>
<td>29%</td>
</tr>
<tr>
<td>Mobile marketing</td>
<td>23%</td>
<td>1%</td>
<td>15%</td>
</tr>
<tr>
<td>Direct mail</td>
<td>31%</td>
<td>11%</td>
<td>26%</td>
</tr>
<tr>
<td>Print ads</td>
<td>34%</td>
<td>20%</td>
<td>32%</td>
</tr>
<tr>
<td>Teleprospecting</td>
<td>70%</td>
<td>3%</td>
<td>18%</td>
</tr>
<tr>
<td>Place-based advertising</td>
<td>53%</td>
<td>8%</td>
<td>26%</td>
</tr>
<tr>
<td>Television/Radio ads</td>
<td>51%</td>
<td>8%</td>
<td>26%</td>
</tr>
<tr>
<td>Product placement</td>
<td>71%</td>
<td>2%</td>
<td>18%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥166
## Chart 1.32 Marketing tactics budget forecast

How do you foresee the percentage of your total marketing budget allocated to the following marketing tactics changing over the next year? **B2B and/or B2G**

<table>
<thead>
<tr>
<th>Marketing tactic</th>
<th>Percentage will decrease</th>
<th>Percentage will not change</th>
<th>Percentage will increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email marketing</td>
<td>3%</td>
<td>2%</td>
<td>33%</td>
</tr>
<tr>
<td>Website</td>
<td>4%</td>
<td>2%</td>
<td>25%</td>
</tr>
<tr>
<td>Social media marketing</td>
<td>9%</td>
<td>4%</td>
<td>25%</td>
</tr>
<tr>
<td>SEO/paid search/Google Adwords</td>
<td>11%</td>
<td>4%</td>
<td>29%</td>
</tr>
<tr>
<td>Online display ads</td>
<td>16%</td>
<td>8%</td>
<td>30%</td>
</tr>
<tr>
<td>Live events/tradeshows</td>
<td>14%</td>
<td>14%</td>
<td>42%</td>
</tr>
<tr>
<td>Mobile marketing</td>
<td>27%</td>
<td>2%</td>
<td>31%</td>
</tr>
<tr>
<td>Direct mail</td>
<td>25%</td>
<td>17%</td>
<td>36%</td>
</tr>
<tr>
<td>Print ads</td>
<td>29%</td>
<td>27%</td>
<td>35%</td>
</tr>
<tr>
<td>Teleprospecting</td>
<td>36%</td>
<td>8%</td>
<td>33%</td>
</tr>
<tr>
<td>Place-based advertising</td>
<td>62%</td>
<td>13%</td>
<td>21%</td>
</tr>
<tr>
<td>Television/Radio ads</td>
<td>65%</td>
<td>11%</td>
<td>20%</td>
</tr>
<tr>
<td>Product placement</td>
<td>71%</td>
<td>8%</td>
<td>18%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=447
### Chart 1.33 Marketing tactics budget forecast

*How do you foresee the percentage of your total marketing budget allocated to the following marketing tactics changing over the next year? Both B2B and B2C*

<table>
<thead>
<tr>
<th>Marketing Tactics</th>
<th>Percentage will decrease</th>
<th>Percentage will not change</th>
<th>Percentage will increase</th>
<th>Not applicable or don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email marketing</td>
<td>6%</td>
<td>4%</td>
<td>29%</td>
<td>62%</td>
</tr>
<tr>
<td>Website</td>
<td>8%</td>
<td>2%</td>
<td>24%</td>
<td>66%</td>
</tr>
<tr>
<td>Social media marketing</td>
<td>12%</td>
<td>3%</td>
<td>21%</td>
<td>64%</td>
</tr>
<tr>
<td>SEO/paid search/Google Adwords</td>
<td>16%</td>
<td>6%</td>
<td>21%</td>
<td>57%</td>
</tr>
<tr>
<td>Online display ads</td>
<td>17%</td>
<td>3%</td>
<td>25%</td>
<td>55%</td>
</tr>
<tr>
<td>Live events/tradeshows</td>
<td>26%</td>
<td>10%</td>
<td>41%</td>
<td>24%</td>
</tr>
<tr>
<td>Mobile marketing</td>
<td>20%</td>
<td>3%</td>
<td>22%</td>
<td>54%</td>
</tr>
<tr>
<td>Direct mail</td>
<td>23%</td>
<td>17%</td>
<td>31%</td>
<td>30%</td>
</tr>
<tr>
<td>Print ads</td>
<td>24%</td>
<td>22%</td>
<td>36%</td>
<td>18%</td>
</tr>
<tr>
<td>Teleprospecting</td>
<td>49%</td>
<td>9%</td>
<td>29%</td>
<td>13%</td>
</tr>
<tr>
<td>Place-based advertising</td>
<td>53%</td>
<td>15%</td>
<td>26%</td>
<td>7%</td>
</tr>
<tr>
<td>Television/Radio ads</td>
<td>51%</td>
<td>14%</td>
<td>27%</td>
<td>8%</td>
</tr>
<tr>
<td>Product placement</td>
<td>66%</td>
<td>5%</td>
<td>23%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥189
Chart 1.34 Marketing tactics budget forecast

How do you foresee the percentage of your total marketing budget allocated to the following marketing tactics changing over the next year? **Nonprofit and Education**

<table>
<thead>
<tr>
<th>Marketing tactic</th>
<th>Percentage will decrease</th>
<th>Percentage will not change</th>
<th>Percentage will increase</th>
<th>Not applicable or don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email marketing</td>
<td>3%</td>
<td>47%</td>
<td>50%</td>
<td>0%</td>
</tr>
<tr>
<td>Website</td>
<td>1%</td>
<td>34%</td>
<td>65%</td>
<td>0%</td>
</tr>
<tr>
<td>Social media marketing</td>
<td>4%</td>
<td>1%</td>
<td>28%</td>
<td>0%</td>
</tr>
<tr>
<td>SEO/paid search/Google Adwords</td>
<td>13%</td>
<td>1%</td>
<td>29%</td>
<td>57%</td>
</tr>
<tr>
<td>Online display ads</td>
<td>19%</td>
<td>6%</td>
<td>27%</td>
<td>47%</td>
</tr>
<tr>
<td>Live events/tradeshows</td>
<td>26%</td>
<td>7%</td>
<td>46%</td>
<td>21%</td>
</tr>
<tr>
<td>Mobile marketing</td>
<td>26%</td>
<td>1%</td>
<td>30%</td>
<td>43%</td>
</tr>
<tr>
<td>Direct mail</td>
<td>15%</td>
<td>12%</td>
<td>45%</td>
<td>28%</td>
</tr>
<tr>
<td>Print ads</td>
<td>17%</td>
<td>18%</td>
<td>53%</td>
<td>12%</td>
</tr>
<tr>
<td>Teleprospecting</td>
<td>52%</td>
<td>4%</td>
<td>35%</td>
<td>9%</td>
</tr>
<tr>
<td>Place-based advertising</td>
<td>66%</td>
<td>8%</td>
<td>22%</td>
<td>4%</td>
</tr>
<tr>
<td>Television/Radio ads</td>
<td>64%</td>
<td>7%</td>
<td>25%</td>
<td>4%</td>
</tr>
<tr>
<td>Product placement</td>
<td>82%</td>
<td>0%</td>
<td>1%</td>
<td>16%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey  
Methodology: Fielded December 2012, N≥75
### Chart 1.35 Marketing tactics budget forecast

How do you foresee the percentage of your total marketing budget allocated to the following marketing tactics changing over the next year? **Marketing Agency or Consultancy**

<table>
<thead>
<tr>
<th>Marketing Strategy</th>
<th>Percentage will decrease</th>
<th>Percentage will not change</th>
<th>Percentage will increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email marketing</td>
<td>3%</td>
<td>3%</td>
<td>72%</td>
</tr>
<tr>
<td>Website</td>
<td>5%</td>
<td>3%</td>
<td>67%</td>
</tr>
<tr>
<td>Social media marketing</td>
<td>7%</td>
<td>8%</td>
<td>21%</td>
</tr>
<tr>
<td>SEO/paid search/Google Adwords</td>
<td>11%</td>
<td>4%</td>
<td>28%</td>
</tr>
<tr>
<td>Online display ads</td>
<td>14%</td>
<td>8%</td>
<td>31%</td>
</tr>
<tr>
<td>Live events/tradeshows</td>
<td>20%</td>
<td>12%</td>
<td>45%</td>
</tr>
<tr>
<td>Mobile marketing</td>
<td>14%</td>
<td>3%</td>
<td>26%</td>
</tr>
<tr>
<td>Direct mail</td>
<td>23%</td>
<td>19%</td>
<td>39%</td>
</tr>
<tr>
<td>Print ads</td>
<td>31%</td>
<td>31%</td>
<td>32%</td>
</tr>
<tr>
<td>Teleprospecting</td>
<td>37%</td>
<td>14%</td>
<td>36%</td>
</tr>
<tr>
<td>Place-based advertising</td>
<td>53%</td>
<td>18%</td>
<td>23%</td>
</tr>
<tr>
<td>Television/Radio ads</td>
<td>55%</td>
<td>15%</td>
<td>23%</td>
</tr>
<tr>
<td>Product placement</td>
<td>64%</td>
<td>10%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Not applicable or don’t know: 3%
Percentage will decrease: 3%
Percentage will not change: 8%
Percentage will increase: 72%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥182
Chart 1.36 Marketing tactics budget forecast

How do you foresee the percentage of your total marketing budget allocated to the following marketing tactics changing over the next year? Professional or Financial Services

<table>
<thead>
<tr>
<th>Marketing Tactics</th>
<th>Percentage Will Decrease</th>
<th>Percentage Will Not Change</th>
<th>Percentage Will Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email marketing</td>
<td>3%</td>
<td>1%</td>
<td>64%</td>
</tr>
<tr>
<td>Website</td>
<td>7%</td>
<td>24%</td>
<td>69%</td>
</tr>
<tr>
<td>Social media marketing</td>
<td>11%</td>
<td>3%</td>
<td>24%</td>
</tr>
<tr>
<td>SEO/paid search/Google Adwords</td>
<td>18%</td>
<td>6%</td>
<td>23%</td>
</tr>
<tr>
<td>Online display ads</td>
<td>16%</td>
<td>5%</td>
<td>28%</td>
</tr>
<tr>
<td>Live events/tradeshows</td>
<td>23%</td>
<td>3%</td>
<td>44%</td>
</tr>
<tr>
<td>Mobile marketing</td>
<td>29%</td>
<td>2%</td>
<td>26%</td>
</tr>
<tr>
<td>Direct mail</td>
<td>25%</td>
<td>14%</td>
<td>30%</td>
</tr>
<tr>
<td>Print ads</td>
<td>25%</td>
<td>16%</td>
<td>42%</td>
</tr>
<tr>
<td>Teleprospecting</td>
<td>44%</td>
<td>4%</td>
<td>29%</td>
</tr>
<tr>
<td>Place-based advertising</td>
<td>57%</td>
<td>7%</td>
<td>32%</td>
</tr>
<tr>
<td>Television/Radio ads</td>
<td>57%</td>
<td>6%</td>
<td>31%</td>
</tr>
<tr>
<td>Product placement</td>
<td>73%</td>
<td>4%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥95
Chart 1.37 Marketing tactics budget forecast

How do you foresee the percentage of your total marketing budget allocated to the following marketing tactics changing over the next year? Retail or E-commerce

<table>
<thead>
<tr>
<th>Marketing Tactics</th>
<th>Percentage will decrease</th>
<th>Percentage will not change</th>
<th>Percentage will increase</th>
<th>Not applicable or don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email marketing</td>
<td>5%</td>
<td>2%</td>
<td>24%</td>
<td>69%</td>
</tr>
<tr>
<td>Website</td>
<td>5%</td>
<td>2%</td>
<td>14%</td>
<td>79%</td>
</tr>
<tr>
<td>Social media marketing</td>
<td>9%</td>
<td>26%</td>
<td></td>
<td>64%</td>
</tr>
<tr>
<td>SEO/paid search/Google Adwords</td>
<td>13%</td>
<td>6%</td>
<td>20%</td>
<td>61%</td>
</tr>
<tr>
<td>Online display ads</td>
<td>15%</td>
<td>6%</td>
<td>18%</td>
<td>62%</td>
</tr>
<tr>
<td>Live events/tradeshows</td>
<td>45%</td>
<td>8%</td>
<td>24%</td>
<td>24%</td>
</tr>
<tr>
<td>Mobile marketing</td>
<td>18%</td>
<td>2%</td>
<td>19%</td>
<td>61%</td>
</tr>
<tr>
<td>Direct mail</td>
<td>33%</td>
<td>11%</td>
<td>23%</td>
<td>33%</td>
</tr>
<tr>
<td>Print ads</td>
<td>33%</td>
<td>15%</td>
<td>34%</td>
<td>17%</td>
</tr>
<tr>
<td>Teleprospecting</td>
<td></td>
<td></td>
<td></td>
<td>68%</td>
</tr>
<tr>
<td>Place-based advertising</td>
<td></td>
<td></td>
<td></td>
<td>12%</td>
</tr>
<tr>
<td>Television/Radio ads</td>
<td></td>
<td></td>
<td></td>
<td>16%</td>
</tr>
<tr>
<td>Product placement</td>
<td></td>
<td></td>
<td></td>
<td>12%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥105
## Chart 1.38 Marketing tactics budget forecast

How do you foresee the percentage of your total marketing budget allocated to the following marketing tactics changing over the next year? **Software or Software as a Service**

<table>
<thead>
<tr>
<th>Marketing Tactics</th>
<th>Percentage will decrease</th>
<th>Percentage will not change</th>
<th>Percentage will increase</th>
<th>Not applicable or don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email marketing</td>
<td>2%</td>
<td>2%</td>
<td>37%</td>
<td>59%</td>
</tr>
<tr>
<td>Website</td>
<td>3%</td>
<td>2%</td>
<td>25%</td>
<td>69%</td>
</tr>
<tr>
<td>Social media marketing</td>
<td>9%</td>
<td>25%</td>
<td>29%</td>
<td>66%</td>
</tr>
<tr>
<td>SEO/paid search/Google Adwords</td>
<td>6%</td>
<td>3%</td>
<td>29%</td>
<td>63%</td>
</tr>
<tr>
<td>Online display ads</td>
<td>16%</td>
<td>5%</td>
<td>22%</td>
<td>58%</td>
</tr>
<tr>
<td>Live events/tradeshows</td>
<td>17%</td>
<td>10%</td>
<td>32%</td>
<td>41%</td>
</tr>
<tr>
<td>Mobile marketing</td>
<td>37%</td>
<td>1%</td>
<td>31%</td>
<td>32%</td>
</tr>
<tr>
<td>Direct mail</td>
<td>41%</td>
<td>7%</td>
<td>30%</td>
<td>23%</td>
</tr>
<tr>
<td>Print ads</td>
<td>44%</td>
<td>19%</td>
<td>26%</td>
<td>10%</td>
</tr>
<tr>
<td>Teleprospecting</td>
<td>31%</td>
<td>4%</td>
<td>33%</td>
<td>32%</td>
</tr>
<tr>
<td>Place-based advertising</td>
<td>71%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Television/Radio ads</td>
<td>73%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Product placement</td>
<td>74%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥114
Chart 1.39 Organizational email marketing goals

Which goals does your organization want to achieve through email marketing in the next 12 months? Please select all that apply.

- Deliver highly relevant content: 67%
- Drive additional traffic to our website: 67%
- Increase sales conversion and/or revenue: 67%
- Increase email engagement metrics: 65%
- Grow and retain subscribers on our list: 63%
- Integrate email with other marketing tactics (e.g. mobile, social): 60%
- Increase lead generation: 59%
- Build brand awareness or reputation: 58%
- Effectively nurture prospects: 56%
- Segment the email database: 49%
- Achieve or measurably increase ROI from email programs: 47%
- Improve email deliverability and inbox placement rates: 45%
- Expand testing and optimization practices: 44%
- Improve database hygiene: 43%
- Qualify leads: 39%
- Integrate our email data with CRM, sCRM and other data systems: 38%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=832
Chart 1.40 Organizational email marketing goals

Which goals does your organization want to achieve through email marketing in the next 12 months? Please select all that apply.

- Deliver highly relevant content 67%
- Drive additional traffic to our website 70%
- Increase sales conversion and/or revenue 73%
- Increase email engagement metrics 71%
- Grow and retain subscribers on our list 71%
- Integrate email with other marketing tactics (e.g. mobile, social) 62%
- Increase lead generation 45%
- Build brand awareness or reputation 51%
- Effectively nurture prospects 47%
- Segment the email database 57%
- Achieve or measurably increase ROI from email programs 45%
- Improve email deliverability and inbox placement rates 52%
- Expand testing and optimization practices 55%
- Improve database hygiene 37%
- Qualify leads 26%
- Integrate our email data with CRM, sCRM and other data systems 39%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=175
Chart 1.41 Organizational email marketing goals

Which goals does your organization want to achieve through email marketing in the next 12 months? Please select all that apply.

- Deliver highly relevant content: 68%
- Drive additional traffic to our website: 67%
- Increase sales conversion and/or revenue: 65%
- Increase email engagement metrics: 61%
- Grow and retain subscribers on our list: 58%
- Integrate email with other marketing tactics (e.g. mobile, social): 58%
- Increase lead generation: 67%
- Build brand awareness or reputation: 62%
- Effectively nurture prospects: 62%
- Segment the email database: 45%
- Achieve or measurably increase ROI from email programs: 47%
- Improve email deliverability and inbox placement rates: 41%
- Expand testing and optimization practices: 37%
- Improve database hygiene: 45%
- Qualify leads: 47%
- Integrate our email data with CRM, sCRM and other data systems: 39%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=449
Chart 1.42 Organizational email marketing goals

Which goals does your organization want to achieve through email marketing in the next 12 months? Please select all that apply.

<table>
<thead>
<tr>
<th>Goal</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deliver highly relevant content</td>
<td>64%</td>
</tr>
<tr>
<td>Drive additional traffic to our website</td>
<td>64%</td>
</tr>
<tr>
<td>Increase sales conversion and/or revenue</td>
<td>71%</td>
</tr>
<tr>
<td>Increase email engagement metrics</td>
<td>67%</td>
</tr>
<tr>
<td>Grow and retain subscribers on our list</td>
<td>68%</td>
</tr>
<tr>
<td>Integrate email with other marketing tactics (e.g. mobile, social)</td>
<td>62%</td>
</tr>
<tr>
<td>Increase lead generation</td>
<td>56%</td>
</tr>
<tr>
<td>Build brand awareness or reputation</td>
<td>57%</td>
</tr>
<tr>
<td>Effectively nurture prospects</td>
<td>53%</td>
</tr>
<tr>
<td>Segment the email database</td>
<td>51%</td>
</tr>
<tr>
<td>Achieve or measurably increase ROI from email programs</td>
<td>48%</td>
</tr>
<tr>
<td>Improve email deliverability and inbox placement rates</td>
<td>46%</td>
</tr>
<tr>
<td>Expand testing and optimization practices</td>
<td>49%</td>
</tr>
<tr>
<td>Improve database hygiene</td>
<td>45%</td>
</tr>
<tr>
<td>Qualify leads</td>
<td>34%</td>
</tr>
<tr>
<td>Integrate our email data with CRM, sCRM and other data systems</td>
<td>38%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=192
Chart 1.43 Barriers to top challenges

*What barriers exist to overcoming your top challenges? Please select all that apply.*

<table>
<thead>
<tr>
<th>Barrier</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inadequate staffing resources and expertise</td>
<td>52%</td>
</tr>
<tr>
<td>Difficulty merging email data with other systems</td>
<td>42%</td>
</tr>
<tr>
<td>Inability to manufacture relevant content on a consistent and predictable basis</td>
<td>32%</td>
</tr>
<tr>
<td>Lack of executive support</td>
<td>31%</td>
</tr>
<tr>
<td>Insufficient testing</td>
<td>30%</td>
</tr>
<tr>
<td>Poor planning to integrate email with other marketing tactics</td>
<td>30%</td>
</tr>
<tr>
<td>Unclear objectives or constantly changing of objectives</td>
<td>28%</td>
</tr>
<tr>
<td>Lack of an effective email marketing strategy</td>
<td>27%</td>
</tr>
<tr>
<td>Inability to segment subscribers properly</td>
<td>25%</td>
</tr>
<tr>
<td>Failure to quantify email marketing ROI</td>
<td>25%</td>
</tr>
<tr>
<td>Unrealistic time frames</td>
<td>21%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=745
Chart 1.44 Barriers to top challenges
What barriers exist to overcoming your top challenges? Please select all that apply.

- Inadequate staffing resources and expertise: 54%
- Difficulty merging email data with other systems: 40%
- Inability to manufacture relevant content on a consistent and predictable basis: 25%
- Lack of executive support: 28%
- Insufficient testing: 36%
- Poor planning to integrate email with other marketing tactics: 33%
- Unclear objectives or constantly changing of objectives: 23%
- Lack of an effective email marketing strategy: 25%
- Inability to segment subscribers properly: 30%
- Failure to quantify email marketing ROI: 19%
- Unrealistic time frames: 21%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=162
Chart 1.45 Barriers to top challenges

What barriers exist to overcoming your top challenges? Please select all that apply.

- Inadequate staffing resources and expertise: 49%
- Difficulty merging email data with other systems: 39%
- Inability to manufacture relevant content on a consistent and predictable basis: 36%
- Lack of executive support: 32%
- Insufficient testing: 28%
- Poor planning to integrate email with other marketing tactics: 27%
- Unclear objectives or constantly changing of objectives: 27%
- Lack of an effective email marketing strategy: 28%
- Inability to segment subscribers properly: 24%
- Failure to quantify email marketing ROI: 28%
- Unrealistic time frames: 19%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=402
Chart 1.46 Barriers to top challenges
What barriers exist to overcoming your top challenges? Please select all that apply.

<table>
<thead>
<tr>
<th>Barrier</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inadequate staffing resources and expertise</td>
<td>55%</td>
</tr>
<tr>
<td>Difficulty merging email data with other systems</td>
<td>52%</td>
</tr>
<tr>
<td>Inability to manufacture relevant content on a consistent and predictable basis</td>
<td>30%</td>
</tr>
<tr>
<td>Lack of executive support</td>
<td>34%</td>
</tr>
<tr>
<td>Insufficient testing</td>
<td>30%</td>
</tr>
<tr>
<td>Poor planning to integrate email with other marketing tactics</td>
<td>33%</td>
</tr>
<tr>
<td>Unclear objectives or constantly changing of objectives</td>
<td>33%</td>
</tr>
<tr>
<td>Lack of an effective email marketing strategy</td>
<td>25%</td>
</tr>
<tr>
<td>Inability to segment subscribers properly</td>
<td>24%</td>
</tr>
<tr>
<td>Failure to quantify email marketing ROI</td>
<td>24%</td>
</tr>
<tr>
<td>Unrealistic time frames</td>
<td>24%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=168
Chart 1.47 Barriers to top challenges

What barriers exist to overcoming your top challenges? Please select all that apply.

- Inadequate staffing resources and expertise: 47%
- Difficulty merging email data with other systems: 38%
- Inability to manufacture relevant content on a consistent and predictable basis: 32%
- Lack of executive support: 27%
- Insufficient testing: 32%
- Poor planning to integrate email with other marketing tactics: 27%
- Unclear objectives or constantly changing of objectives: 27%
- Lack of an effective email marketing strategy: 29%
- Inability to segment subscribers properly: 22%
- Failure to quantify email marketing ROI: 25%
- Unrealistic time frames: 21%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=402
Chart 1.48 Barriers to top challenges

What barriers exist to overcoming your top challenges? Please select all that apply.

- Inadequate staffing resources and expertise: 59%
- Difficulty merging email data with other systems: 46%
- Inability to manufacture relevant content on a consistent and predictable basis: 32%
- Lack of executive support: 36%
- Insufficient testing: 27%
- Poor planning to integrate email with other marketing tactics: 33%
- Unclear objectives or constantly changing of objectives: 28%
- Lack of an effective email marketing strategy: 25%
- Inability to segment subscribers properly: 29%
- Failure to quantify email marketing ROI: 25%
- Unrealistic time frames: 21%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=321
Chart 1.49 Barriers to top challenges

What barriers exist to overcoming your top challenges? Please select all that apply. Under 100k emails sent a month

- Inadequate staffing resources and expertise: 50%
- Difficulty merging email data with other systems: 39%
- Inability to manufacture relevant content on a consistent and predictable basis: 36%
- Lack of executive support: 32%
- Insufficient testing: 31%
- Poor planning to integrate email with other marketing tactics: 30%
- Unclear objectives or constantly changing of objectives: 28%
- Lack of an effective email marketing strategy: 33%
- Inability to segment subscribers properly: 24%
- Failure to quantify email marketing ROI: 30%
- Unrealistic time frames: 19%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=457
Chart 1.50 Barriers to top challenges

What barriers exist to overcoming your top challenges? Please select all that apply. Over 100k emails sent a month

- Inadequate staffing resources and expertise: 54%
- Difficulty merging email data with other systems: 47%
- Inability to manufacture relevant content on a consistent and predictable basis: 26%
- Lack of executive support: 31%
- Insufficient testing: 28%
- Poor planning to integrate email with other marketing tactics: 30%
- Unclear objectives or constantly changing of objectives: 27%
- Lack of an effective email marketing strategy: 18%
- Inability to segment subscribers properly: 27%
- Failure to quantify email marketing ROI: 18%
- Unrealistic time frames: 24%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=288
CHAPTER TWO

The Message: Points to Consider

At the core of any successful email send is the ability to communicate a compelling message, and encourage a response. To effectively do so in an era replete with real-time social communication, marketers must be able to not only craft engaging email content, but also competently measure the elements that are – and are not – working in their sends.

This measurement can provide the insights necessary to streamline, target and improve delivery of email content.

Our surveyed marketers helped us determine:

- Marketers’ involvement with tracking, analyzing and/or reporting email metrics
- The types of email marketing metrics tracked by surveyed organizations
- Average rates for selected email marketing metrics
- The types of automated email messages deployed by organizations
The Message: Points to Consider

**WHAT EMAIL MARKETING METRICS DO MARKETERS TRACK ... AND HOW ARE THEY PERFORMING?**

As we learned in the *2013 Marketing Analytics Benchmark Report*, a majority of marketers are tracking email metrics, as indicated by 63% of respondents in that survey.

Respondents to the 2013 Email Marketing Benchmark Survey were similarly aligned, with 83% indicating they were involved with tracking, analyzing or reporting upon email metrics (Chart 2.1).

But, what types of email metrics are being tracked? When asked about different types of email marketing metrics tracked by their organizations, both “clickthrough rate” (92%) and “open rate” (90%) were selected as the primary focal points for surveyed marketers across businesses serving all customer types (Chart 2.3, Chart 2.4, and Chart 2.5).

Consumer-focused companies seemingly place more emphasis on generating revenue-per-email (53%) than their B2B/B2G counterparts (32%) (Chart 2.3).

Interestingly, despite a growth of social media integration within email – all the more notable with the recent increase in HTML-5 email sends – only 25% of surveyed marketers were tracking social sharing, overall (Chart 2.2).
The Message: Points to Consider

Also interesting is that slightly more B2B/B2G marketers (28%) tracked social sharing metrics than B2C marketers, despite social media’s strong presence on consumer-oriented emails and websites (Chart 2.4).

When asked to estimate average rates for a series of email marketing metrics, respondents were overwhelmingly confident in their delivery (84%) and inbox placement (71%) performance (Chart 2.6). The latter is somewhat surprising, considering just 17% of surveyed marketers indicated they tracked this metric.

Points to Consider

While we at MarketingSherpa believe the point of an email is to get a click, not a conversion, the data above shows a notable disparity between clickthrough and open-rate tracking, and metrics accrued following this initial engagement.

Do your organization’s email tracking efforts resemble those of our surveyed marketers? Have you seen a benefit in tracking social media metrics, or has your organization remained primarily focused on clicks and opens?

When estimating inbox placement, are your numbers based upon trackable metrics, or other determinants, such as past performance?
The Message: Points to Consider

WHAT TYPES OF AUTOMATED MESSAGES ARE BEING DEPLOYED BY ORGANIZATIONS?

Today’s email automation tools have made it possible to go beyond simple autoresponder welcome and “thank you” messages, to create a series of correspondences that are both thorough and organic in appearance.

When we asked about the types of automated, event-triggered, lifecycle emails being sent by their organizations, we found that the two most-common results were the afore-mentioned “welcome” (50%) and “thank you” (48%) sends (Chart 2.10).

Also commonly selected was automated transactional sends, such as order confirmations and receipts, selected by 40% of surveyed marketers (Chart 2.10).

However, post-purchase follow-up sends, such as satisfaction surveys, were deployed by just 25% of respondents, indicating a potentially costly gap in some marketers’ email programs.

And, if customers were lost, our surveyed marketers did not appear to commonly re-engage, as 15% indicated their organizations sent win-back emails, and just 9% sent shopping cart abandonment reminders.
The Message: Points to Consider

However, not surprisingly, our results indicated a likelihood that consumer-oriented organizations send more win-back and shopping cart abandonment emails (Chart 2.10).

Also notable was how transactional emails (receipts, order confirmations, etc.) differed based on organization size. Nearly half (46%) of marketers from organizations with more than 100 employees indicated they sent such correspondences (Chart 2.15), while just 34% of their smaller-sized counterparts did the same (Chart 2.14).

Points to Consider
Do you feel there are gaps in your email outreach to prospects and/or customers? How do you feel these lapses in communication have affected your overall conversions? Do you have plans to improve customer email interaction in the future? What types of emails do you plan to add or enhance within your current email marketing campaigns?
Chart 2.1 Individual email metrics involvement

Are you involved with tracking, analyzing or reporting on email metrics for your organization?

- Yes: 83%
- No: 17%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=698
## Chart 2.2 Email analytics tracking

*Which of the following email marketing metrics does your organization track?*

<table>
<thead>
<tr>
<th>Metric</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clickthrough rate</td>
<td>92%</td>
</tr>
<tr>
<td>Open rate</td>
<td>90%</td>
</tr>
<tr>
<td>Unsubscribe rate</td>
<td>79%</td>
</tr>
<tr>
<td>Delivery rate</td>
<td>70%</td>
</tr>
<tr>
<td>Hard bounce rate</td>
<td>67%</td>
</tr>
<tr>
<td>Soft bounce rate</td>
<td>56%</td>
</tr>
<tr>
<td>Clicks-per-email</td>
<td>49%</td>
</tr>
<tr>
<td>Post-click conversion rate</td>
<td>43%</td>
</tr>
<tr>
<td>List size</td>
<td>43%</td>
</tr>
<tr>
<td>Clicks-per-link in email</td>
<td>38%</td>
</tr>
<tr>
<td>Complaint rate</td>
<td>35%</td>
</tr>
<tr>
<td>Revenue-per-email</td>
<td>32%</td>
</tr>
<tr>
<td>Social sharing rate</td>
<td>28%</td>
</tr>
<tr>
<td>Response by list segment</td>
<td>25%</td>
</tr>
<tr>
<td>Inbox placement rate</td>
<td>17%</td>
</tr>
<tr>
<td>Average message size</td>
<td>9%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey  
Methodology: Fielded December 2012, N=578
Chart 2.3 Email analytics tracking

Which of the following email marketing metrics does your organization track?

- Clickthrough rate: 89%
- Open rate: 91%
- Unsubscribe rate: 75%
- Delivery rate: 71%
- Hard bounce rate: 61%
- Soft bounce rate: 55%
- Clicks-per-email: 51%
- Post-click conversion rate: 52%
- List size: 51%
- Clicks-per-link in email: 33%
- Complaint rate: 39%
- Revenue-per-email: 53%
- Social sharing rate: 25%
- Response by list segment: 23%
- Inbox placement rate: 21%
- Average message size: 9%
- Other: 4%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=138
Chart 2.4 Email analytics tracking

Which of the following email marketing metrics does your organization track? **B2B & B2G**

<table>
<thead>
<tr>
<th>Metric</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clickthrough rate</td>
<td>93%</td>
</tr>
<tr>
<td>Open rate</td>
<td>91%</td>
</tr>
<tr>
<td>Unsubscribe rate</td>
<td>78%</td>
</tr>
<tr>
<td>Delivery rate</td>
<td>70%</td>
</tr>
<tr>
<td>Hard bounce rate</td>
<td>73%</td>
</tr>
<tr>
<td>Soft bounce rate</td>
<td>58%</td>
</tr>
<tr>
<td>Clicks-per-email</td>
<td>48%</td>
</tr>
<tr>
<td>Post-click conversion rate</td>
<td>38%</td>
</tr>
<tr>
<td>List size</td>
<td>40%</td>
</tr>
<tr>
<td>Clicks-per-link in email</td>
<td>40%</td>
</tr>
<tr>
<td>Complaint rate</td>
<td>32%</td>
</tr>
<tr>
<td>Revenue-per-email</td>
<td>22%</td>
</tr>
<tr>
<td>Social sharing rate</td>
<td>28%</td>
</tr>
<tr>
<td>Response by list segment</td>
<td>23%</td>
</tr>
<tr>
<td>Inbox placement rate</td>
<td>17%</td>
</tr>
<tr>
<td>Average message size</td>
<td>7%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=308
Which of the following email marketing metrics does your organization track?

- Clickthrough rate: 93%
- Open rate: 87%
- Unsubscribe rate: 85%
- Delivery rate: 71%
- Hard bounce rate: 57%
- Soft bounce rate: 50%
- Clicks-per-email: 48%
- Post-click conversion rate: 48%
- List size: 43%
- Clicks-per-link in email: 38%
- Complaint rate: 38%
- Revenue-per-email: 32%
- Social sharing rate: 31%
- Response by list segment: 29%
- Inbox placement rate: 14%
- Average message size: 12%
- Other: 5%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=127
Chart 2.6 Email marketing metrics averages

Please estimate your average rates for the following metrics for ALL of your email marketing communications.

- Delivery rate: 84%
- Inbox placement rate: 71%
- Unique open rate: 22%
- Unique clickthrough rate: 11%
- Conversion rate: 7%
- Unsubscribe rate: 2%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥119
Chart 2.7 Email marketing metrics averages

Please estimate your average rates for the following metrics for ALL of your email marketing communications.

- Delivery rate: 83%
- Inbox placement rate: 66%
- Unique open rate: 22%
- Unique clickthrough rate: 10%
- Conversion rate: 6%
- Unsubscribe rate: 2%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥33
Chart 2.8 Email marketing metrics averages

Please estimate your average rates for the following metrics for ALL of your email marketing communications.

- Delivery rate: 85%
- Inbox placement rate: 73%
- Unique open rate: 22%
- Unique clickthrough rate: 13%
- Conversion rate: 7%
- Unsubscribe rate: 3%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=64
Chart 2.9 Email marketing metrics averages

Please estimate your average rates for the following metrics for ALL of your email marketing communications.

- **Delivery rate**: 84%
- **Inbox placement rate**: 69%
- **Unique open rate**: 22%
- **Unique clickthrough rate**: 9%
- **Conversion rate**: 9%
- **Unsubscribe rate**: 3%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥22
What type of automated, event-triggered, lifecycle email messages does your organization deploy? Please check all that apply.

- Welcome: 50%
- Thanks: 48%
- Transactional (e.g. bills, receipts, order confirmations): 40%
- Activation (e.g. How to use a product or service): 26%
- Post purchase (e.g. customer survey, product review): 25%
- Upsell/Cross promotional (e.g. product recommendations): 25%
- Date triggered (e.g. renewals, reorder, birthday): 24%
- Triggered based on website behavior (e.g. visits, browser history): 18%
- Event countdown: 18%
- Win-back/reengagement: 15%
- Shopping cart abandonment: 9%
- Other: 7%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=272
Chart 2.11 Organizational deployment of automated emails

What type of automated, event-triggered, lifecycle email messages does your organization deploy? Please check all that apply.

- **Welcome** 64%
- **Thanks** 49%
- **Transactional** (e.g. bills, receipts, order confirmations) 60%
- **Activation** (e.g. How to use a product or service) 36%
- **Post purchase** (e.g. customer survey, product review) 25%
- **Upsell/Cross promotional** (e.g. product recommendations) 38%
- **Date triggered** (e.g. renewals, reorder, birthday) 26%
- **Triggered based on website behavior** (e.g. visits, browser history) 21%
- **Event countdown** 21%
- **Win-back/reengagement** 21%
- **Shopping cart abandonment** 19%
- **Other** 9%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=53
Chart 2.12 Organizational deployment of automated emails

What type of automated, event-triggered, lifecycle email messages does your organization deploy? Please check all that apply.

<table>
<thead>
<tr>
<th>Message Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome</td>
<td>45%</td>
</tr>
<tr>
<td>Thanks</td>
<td>48%</td>
</tr>
<tr>
<td>Transactional (e.g. bills, receipts, order confirmations)</td>
<td>27%</td>
</tr>
<tr>
<td>Activation (e.g. How to use a product or service)</td>
<td>22%</td>
</tr>
<tr>
<td>Post purchase (e.g. customer survey, product review)</td>
<td>23%</td>
</tr>
<tr>
<td>Upsell/Cross promotional (e.g. product recommendations)</td>
<td>22%</td>
</tr>
<tr>
<td>Date triggered (e.g. renewals, reorder, birthday)</td>
<td>20%</td>
</tr>
<tr>
<td>Triggered based on website behavior (e.g. visits, browser history)</td>
<td>23%</td>
</tr>
<tr>
<td>Event countdown</td>
<td>20%</td>
</tr>
<tr>
<td>Win-back/reengagement</td>
<td>14%</td>
</tr>
<tr>
<td>Shopping cart abandonment</td>
<td>6%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=143
Chart 2.13 Organizational deployment of automated emails

What type of automated, event-triggered, lifecycle email messages does your organization deploy? Please check all that apply.

- Welcome: 50%
- Thanks: 46%
- Transactional (e.g. bills, receipts, order confirmations): 50%
- Activation (e.g. How to use a product or service): 29%
- Post purchase (e.g. customer survey, product review): 29%
- Upsell/Cross promotional (e.g. product recommendations): 21%
- Date triggered (e.g. renewals, reorder, birthday): 29%
- Triggered based on website behavior (e.g. visits, browser history): 8%
- Event countdown: 11%
- Win-back/reengagement: 15%
- Shopping cart abandonment: 10%
- Other: 8%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=72
Chart 2.14 Organizational deployment of automated emails

What type of automated, event-triggered, lifecycle email messages does your organization deploy? Please check all that apply.

- Welcome: 51%
- Thanks: 49%
- Transactional (e.g. bills, receipts, order confirmations): 34%
- Activation (e.g. How to use a product or service): 26%
- Post purchase (e.g. customer survey, product review): 27%
- Upsell/Cross promotional (e.g. product recommendations): 26%
- Date triggered (e.g. renewals, reorder, birthday): 23%
- Triggered based on website behavior (e.g. visits, browser history): 20%
- Event countdown: 15%
- Win-back/reengagement: 16%
- Shopping cart abandonment: 8%
- Other: 6%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=145
Chart 2.15 Organizational deployment of automated emails

What type of automated, event-triggered, lifecycle email messages does your organization deploy? Please check all that apply.

<table>
<thead>
<tr>
<th>Type of Email</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome</td>
<td>50%</td>
</tr>
<tr>
<td>Thanks</td>
<td>48%</td>
</tr>
<tr>
<td>Transactional</td>
<td>46%</td>
</tr>
<tr>
<td>Transactional (e.g. bills, receipts, order confirmations)</td>
<td>46%</td>
</tr>
<tr>
<td>Activation</td>
<td>28%</td>
</tr>
<tr>
<td>Activation (e.g. How to use a product or service)</td>
<td>28%</td>
</tr>
<tr>
<td>Post purchase</td>
<td>22%</td>
</tr>
<tr>
<td>Post purchase (e.g. customer survey, product review)</td>
<td>22%</td>
</tr>
<tr>
<td>Upsell/ Cross promotional</td>
<td>23%</td>
</tr>
<tr>
<td>Upsell/ Cross promotional (e.g. product recommendations)</td>
<td>23%</td>
</tr>
<tr>
<td>Date triggered</td>
<td>24%</td>
</tr>
<tr>
<td>Date triggered (e.g. renewals, reorder, birthday)</td>
<td>24%</td>
</tr>
<tr>
<td>Triggered based on website behavior</td>
<td>17%</td>
</tr>
<tr>
<td>Triggered based on website behavior (e.g. visits, browser history)</td>
<td>17%</td>
</tr>
<tr>
<td>Event countdown</td>
<td>21%</td>
</tr>
<tr>
<td>Event countdown</td>
<td>21%</td>
</tr>
<tr>
<td>Win-back/reengagement</td>
<td>15%</td>
</tr>
<tr>
<td>Shopping cart abandonment</td>
<td>10%</td>
</tr>
<tr>
<td>Other</td>
<td>8%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=126
Chart 2.16 Organizational deployment of automated emails

What type of automated, event-triggered, lifecycle email messages does your organization deploy? Please check all that apply.

- Welcome: 59%
- Thanks: 59%
- Transactional (e.g. bills, receipts, order confirmations): 32%
- Activation (e.g. How to use a product or service): 24%
- Post purchase (e.g. customer survey, product review): 24%
- Upsell/Cross promotional (e.g. product recommendations): 29%
- Date triggered (e.g. renewals, reorder, birthday): 31%
- Triggered based on website behavior (e.g. visits, browser history): 22%
- Event countdown: 19%
- Win-back/reengagement: 27%
- Shopping cart abandonment: 8%
- Other: 8%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=59
Chart 2.17 Email message metrics averages

Please estimate your average rates for the following metrics for each type of email message.

- **Delivery:**
  - Welcome email or series: 89%
  - Nurturing/Drip: 84%
  - Activation/Promotional: 83%
  - Retention: 68%
  - Transactional: 75%

- **Open:**
  - Welcome email or series: 44%
  - Nurturing/Drip: 22%
  - Activation/Promotional: 25%
  - Retention: 18%
  - Transactional: 39%

- **Clickthrough:**
  - Welcome email or series: 24%
  - Nurturing/Drip: 10%
  - Activation/Promotional: 11%
  - Retention: 8%
  - Transactional: 22%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥27
The Medium: Points to Consider

Arguably, email remains a marketer’s most effective tool in terms of content reach. But, even the widest-cast net won’t produce results if your readers aren’t compelled by your content, or, even worse, aren’t receiving it at all. **Proper list growth and management, alongside engaging, consistently delivered content, are the keys to maximizing email effectiveness.**

Our surveyed marketers helped us determine:

- Email list growth trends from 2012
- Expected email list growth tactics for 2013
- The difficulty and effectiveness for various list growth tactics
- Tactics used to increase and improve email engagement and deliverability
The Medium: Points to Consider

**WHAT ARE ORGANIZATIONS DOING TO GROW THEIR EMAIL LISTS?**

When determining which tactics organizations were using to grow and expand their email lists, we first needed to assess marketers’ perspectives about their current email program list growth. Of the 602 respondents who answered this question, an overwhelming 50% indicated their lists were on a “somewhat positive” trend, with slowly growing lists (Chart 3.1).

This is a positive sign for email marketers, especially given that just 6.5% of surveyed marketers indicated their lists were showing a negative trend. However, only 17% indicated their list growth was “very positive,” while 26% claimed no gains or losses in list growth.

When asked about the types of tactics their organizations used to drive email list growth, 77% of respondents indicated “website registration page” – nearly 30% more than the second-most selected option (Chart 3.7).

Interestingly, nearly half of respondents still seemingly found value in paper, pencil and organic word-of-mouth, as 47% saw list growth through offline events – 10% more than those who selected “online events.”
The Medium: Points to Consider

Somewhat ironically, of surveyed marketers, those from software or SaaS companies found the most value in offline events, with 59% indicating so (Chart 3.11).

Of the defined tactics presented to surveyed marketers, the least-selected option was “co-registration programs,” which garnered just 12% of responses. These programs were a major list growth tactic during the late-1990s dot-com explosion, and can still work if you find the right partner, and can justify the potentially high cost of acquiring these new subscribers. However, the cost and difficulty of co-registration programs seems to have deterred our surveyed marketers from employing this tactic (Chart 3.12).

Points to Consider
For this question, both paid search (28%) and co-registration programs (12%) performed relatively poorly in comparison to more organic list growth tactics. Do you feel these tactics have exhausted their usefulness for list quality and quantity? Is your organization employing these types of tactics? Are they continuing to perform well, or is your organization shifting to a more inbound approach?
The Medium: Points to Consider

HOW EFFECTIVE (AND/OR DIFFICULT) DO MARKETERS FIND THEIR LIST GROWTH TACTICS?

Based on survey results, there is a correlation between the top list growth tactics used by marketers, and ease of use. The two most-selected list growth tactics – “website registration page” and “social media sharing buttons in email” – were also two of the easiest to implement, as they were considered “very easy” by 45% and 49% of respondents, respectively (Chart 3.12).

However, “email to a friend” – the tactic considered by most to be “very easy” to implement for this question (58%) – was used by just 31% of respondents (Chart 3.7). Perhaps this relatively low overall usage is related to the fact that less than half (48%) of surveyed marketers found this tactic to be “very” or “somewhat” effective (Chart 3.13).

On a similar note, “registration during purchase,” a list growth tactic selected by just 41% of marketers overall, was considered either “very” or “somewhat” effective by a significant 94% of respondents (Chart 3.13).

“Co-registration programs” – the least-used tactic overall – was considered to be effective by more than two-thirds (69%) of respondents. Yet, it was also considered “somewhat” or “very” difficult by 77% of these same marketers, likely explaining the lack of use of the tactic.
The Medium: Points to Consider

It appears marketers are shifting toward streamlining the email registration process. When asked which form data was requested during registration, the majority of respondents indicated “Email address” (an obvious 100%) and “Name” (70%). Outside of these two data fields, no more than 35% of marketers selected any one of the remaining information options (Chart 3.24).

Likewise, it appears that content is king. **When asked which tactic has been most effective for registering new email subscribers, those that provided content – or access to content – were considered most effective.** Whitepapers, or similar premium content, were considered most effective by 29% of respondents, while webinars, site access and coupons for discounts on exclusive content were each selected by 19% of surveyed marketers (Chart 3.28).

Brian Reich, Managing Director, little m media believes, “*It’s not worth sending an email unless there is content worth reading, sharing and discussing.*” Our ability to source content that has value to our audience(s) and/or create that content ourselves will determine our email marketing strategy.

Conversely, **sweepstakes and gift cards – offered by many organizations to garner immediate attention from users – were considered effective by just 10% and 6% of respondents**, respectively. This is perhaps due to the nature of these offers, and how they are often unrelated to your organization’s offerings, which brings in lower-quality names, resulting in a less-targeted list.
The Medium: Points to Consider

Points to Consider
Are you satisfied with the effectiveness and ease of use of your list growth tactics? What hindrances have you faced with your tactics, and what steps are you taking to rectify them? Do you feel the results garnered from your currently used tactics justify any difficulties you may face in implementing them?

Which of your currently used tactics has been the most surprising in terms of effectiveness, or lack thereof? Have you effectively used sweepstakes-type offers to build a quality list? Or, have you had more success using incentives directly related to the value offered in your content?

How are marketers improving email engagement?
When asked to offer insights about the improvement of email relevance and engagement, we received a number of varied responses. However, one of the primary themes was a lack of capability to properly target recipients, as seen in this comment: “Our greatest challenge is time. We have been doing email campaigning for about 18 months, so we are still learning. We have a robust database but lack time and resources to mine it like we could.”
CHAPTER THREE

The Medium: Points to Consider

It must be said that email segmentation and dynamic personalization followed closely behind, at 37% and 36%, respectively. Yet, significantly more marketers used triggered emails than subscriber-controlled email preferences (21%), gamification (18%) or loyalty programs (14%) to increase relevance.

One marketer offered, “We had complaints about personalization. People wanted to forward, but didn’t want their name attached to the email. We stopped personalizing for that reason.”

Interestingly, just 12% of respondents indicated they had dedicated resources for content production, further tying into the sentiment of frustration expressed in the earlier anecdote, as these resources could allow organizations to better navigate and utilize the data residing in their lists.

While more than half of respondents indicated they could segment their lists by email engagement behavior (55%) or purchase history (53%), just 38% said the same about user-declared personal preferences. Even fewer (28%) could segment based on user device habits. This is telling, as it shows a distinct gap between marketer actions, and the wants and needs of subscribers (Chart 3.34).
The Medium: Points to Consider

One surveyed marketer felt the onus lied outside the marketing department:

“As a consultant, [our] primary challenge is actually just getting the client to care. They know email works for them, and to them that’s good enough. They are resistant to improving it because their marketing is in a state where the focus goes on things that aren’t working, rather than on things that are working. I gently and persistently try to change this mindset, but the CEO is dead-set on doing certain kinds of marketing, even though they have never earned ROI.”

Of course, it isn’t surprising to see the bottom line factor into this discussion. No matter how well you engage your audience, it is for naught if the engagement does not lead to conversion, as illustrated in the following comment:

“The most engaging content for our customers is knowledge sharing, but that tends to produce the least amount of sales leads. At the end of the day, the leadership team cares about sales leads, not engagement metrics. It’s difficult to balance long-term customer intimacy planning with short-term lead goals.”
The Medium: Points to Consider

**How are marketers improving email deliverability?**

Similarly, marketers indicated they were actively maintaining list hygiene (41%), removing inactive subscribers (39%), and requesting white list status (22%) to improve deliverability.

One marketer offered his approach, “[We] don't plan on spamming people. Which means making sure every email provides a benefit to the customer and is not simply a marketing push.”

However, it must be noted that **just 15% were checking their reputation scores, and 7% were sending repermission emails to possibly re-engage dormant subscribers.**

Perhaps this once again ties into a lack of resources or capabilities, or marketers simply choosing an easier path to follow. While a significant number of respondents found it both easy and effective to remove inactive subscribers ([Chart 3.40](#)), comparatively few felt similarly about launching reactivation campaigns ([Chart 3.36](#)).

**Points to Consider**

In general business terms, it typically costs significantly more to obtain a new customer versus retaining an existing customer. Based on the results, the “rules” may be different for email marketers.
The Medium: Points to Consider

Is this demonstrated lack of focus on engagement the result of poor marketing tactics, or are other factors in play? Have you found that personalization hasn’t achieved an ROI worthy of the time and resources involved in doing so? Have you achieved better results with auto-triggered responses?

Are you surprised that relatively few marketers were focusing on repermission or reactivation emails for dormant subscribers? In your email efforts, do you opt to grow your list and hope to improve deliverability through new subscribers? Or, do you focus more on the names you already have?
Chart 3.1 Email list growth trends

Which statement best describes your organization's email list growth trend for the past 12 months?

- Very positive, our list is rapidly growing: 17%
- Somewhat positive, our list is slowly growing: 50%
- Neutral, the gains balance out the losses: 26%
- Somewhat negative, our list is slowly shrinking: 6%
- Very negative, our list is rapidly shrinking: 1%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=602
Chart 3.2 Email list growth trends

Which statement best describes your organization's email list growth trend for the past 12 months?

- Very positive, our list is rapidly growing: 10%
- Somewhat positive, our list is slowly growing: 59%
- Neutral, the gains balance out the losses: 21%
- Somewhat negative, our list is slowly shrinking: 9%
- Very negative, our list is rapidly shrinking: 2%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=58
Chart 3.3 Email list growth trends

Which statement best describes your organization's email list growth trend for the past 12 months?

- Very positive, our list is rapidly growing (17%)
- Somewhat positive, our list is slowly growing (50%)
- Neutral, the gains balance out the losses (28%)
- Somewhat negative, our list is slowly shrinking (6%)

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=127
Chart 3.4 Email list growth trends

Which statement best describes your organization's email list growth trend for the past 12 months?

- Very positive, our list is rapidly growing: 13%
- Somewhat positive, our list is slowly growing: 48%
- Neutral, the gains balance out the losses: 31%
- Somewhat negative, our list is slowly shrinking: 7%
- Very negative, our list is rapidly shrinking: 1%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=75
Chart 3.5 Email list growth trends
Which statement best describes your organization's email list growth trend for the past 12 months?

- Very positive, our list is rapidly growing: 20%
- Somewhat positive, our list is slowly growing: 52%
- Neutral, the gains balance out the losses: 21%
- Somewhat negative, our list is slowly shrinking: 6%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=84
Chart 3.6 Email list growth trends

Which statement best describes your organization's email list growth trend for the past 12 months?

- Very positive, our list is rapidly growing: 25%
- Somewhat positive, our list is slowly growing: 44%
- Neutral, the gains balance out the losses: 25%
- Somewhat negative, our list is slowly shrinking: 6%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=84
Chart 3.7 Email list growth tactics

Which of the following tactics is your organization using to drive email list growth? Please select all that apply.

- Website registration page: 77%
- Social media sharing buttons in email: 48%
- Offline events: 47%
- Registration during purchase: 41%
- Online events: 39%
- Facebook registration page: 34%
- Email to a friend: 31%
- Paid search: 29%
- Blog registration page: 28%
- Co-registration programs: 12%
- Other: 6%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=451
### Chart 3.8 Email list growth tactics

*Which of the following tactics is your organization using to drive email list growth? Please select all that apply.*

<table>
<thead>
<tr>
<th>tactic</th>
<th>percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website registration page</td>
<td>78%</td>
</tr>
<tr>
<td>Social media sharing buttons in email</td>
<td>49%</td>
</tr>
<tr>
<td>Offline events</td>
<td>49%</td>
</tr>
<tr>
<td>Registration during purchase</td>
<td>30%</td>
</tr>
<tr>
<td>Online events</td>
<td>33%</td>
</tr>
<tr>
<td>Facebook registration page</td>
<td>38%</td>
</tr>
<tr>
<td>Email to a friend</td>
<td>39%</td>
</tr>
<tr>
<td>Paid search</td>
<td>35%</td>
</tr>
<tr>
<td>Blog registration page</td>
<td>38%</td>
</tr>
<tr>
<td>Co-registration programs</td>
<td>13%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=103
Chart 3.9 Email list growth tactics

Which of the following tactics is your organization using to drive email list growth? Please select all that apply.

- Website registration page: 64%
- Social media sharing buttons in email: 45%
- Offline events: 49%
- Registration during purchase: 36%
- Online events: 45%
- Facebook registration page: 15%
- Email to a friend: 25%
- Paid search: 26%
- Blog registration page: 23%
- Co-registration programs: 11%
- Other: 6%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=53
## Chart 3.10 Email list growth tactics

*Which of the following tactics is your organization using to drive email list growth? Please select all that apply.*

<table>
<thead>
<tr>
<th>Tactics</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website registration page</td>
<td>64%</td>
</tr>
<tr>
<td>Social media sharing buttons in email</td>
<td>45%</td>
</tr>
<tr>
<td>Offline events</td>
<td>49%</td>
</tr>
<tr>
<td>Registration during purchase</td>
<td>36%</td>
</tr>
<tr>
<td>Online events</td>
<td>45%</td>
</tr>
<tr>
<td>Facebook registration page</td>
<td>15%</td>
</tr>
<tr>
<td>Email to a friend</td>
<td>25%</td>
</tr>
<tr>
<td>Paid search</td>
<td>26%</td>
</tr>
<tr>
<td>Blog registration page</td>
<td>23%</td>
</tr>
<tr>
<td>Co-registration programs</td>
<td>11%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=53
Chart 3.11 Email list growth tactics

Which of the following tactics is your organization using to drive email list growth? Please select all that apply.

<table>
<thead>
<tr>
<th>Tactics</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website registration page</td>
<td>76%</td>
</tr>
<tr>
<td>Social media sharing buttons in email</td>
<td>42%</td>
</tr>
<tr>
<td>Offline events</td>
<td>59%</td>
</tr>
<tr>
<td>Registration during purchase</td>
<td>41%</td>
</tr>
<tr>
<td>Online events</td>
<td>58%</td>
</tr>
<tr>
<td>Facebook registration page</td>
<td>25%</td>
</tr>
<tr>
<td>Email to a friend</td>
<td>22%</td>
</tr>
<tr>
<td>Paid search</td>
<td>37%</td>
</tr>
<tr>
<td>Blog registration page</td>
<td>36%</td>
</tr>
<tr>
<td>Co-registration programs</td>
<td>14%</td>
</tr>
<tr>
<td>Other</td>
<td>7%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=66
Chart 3.12  Email list growth tactics difficulties

Please indicate the degree of DIFFICULTY (time, effort and expense) for each of the email list growth tactics your organization is using.

<table>
<thead>
<tr>
<th>Tactical Approach</th>
<th>Very easy</th>
<th>Somewhat easy</th>
<th>Somewhat difficult</th>
<th>Very difficult</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website registration page</td>
<td>45%</td>
<td>40%</td>
<td>13%</td>
<td>3%</td>
</tr>
<tr>
<td>Social media sharing buttons in email</td>
<td>49%</td>
<td>37%</td>
<td>12%</td>
<td>3%</td>
</tr>
<tr>
<td>Offline events</td>
<td>19%</td>
<td>6%</td>
<td>40%</td>
<td>35%</td>
</tr>
<tr>
<td>Registration during purchase</td>
<td>50%</td>
<td>2%</td>
<td>40%</td>
<td>9%</td>
</tr>
<tr>
<td>Online events</td>
<td>28%</td>
<td>3%</td>
<td>41%</td>
<td>29%</td>
</tr>
<tr>
<td>Facebook registration page</td>
<td>29%</td>
<td>45%</td>
<td>24%</td>
<td>2%</td>
</tr>
<tr>
<td>Email to a friend</td>
<td>58%</td>
<td>5%</td>
<td>27%</td>
<td>9%</td>
</tr>
<tr>
<td>Paid search</td>
<td>16%</td>
<td>4%</td>
<td>44%</td>
<td>36%</td>
</tr>
<tr>
<td>Blog registration page</td>
<td>48%</td>
<td>36%</td>
<td>12%</td>
<td>4%</td>
</tr>
<tr>
<td>Co-registration programs</td>
<td>15%</td>
<td>9%</td>
<td>28%</td>
<td>49%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥47

128
**Chart 3.13  Email list growth tactics effectiveness**

*Please indicate the level of EFFECTIVENESS for each of the email list growth tactics your organization employs.*

<table>
<thead>
<tr>
<th>Email list growth tactics</th>
<th>Very effective</th>
<th>Somewhat effective</th>
<th>Somewhat ineffective</th>
<th>Very ineffective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website registration page</td>
<td>39%</td>
<td>46%</td>
<td>12%</td>
<td>3%</td>
</tr>
<tr>
<td>Social media sharing buttons in</td>
<td>9%</td>
<td>40%</td>
<td>35%</td>
<td>16%</td>
</tr>
<tr>
<td>email</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Offline events</td>
<td>31%</td>
<td>51%</td>
<td>17%</td>
<td>2%</td>
</tr>
<tr>
<td>Registration during purchase</td>
<td>63%</td>
<td>31%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>Online events</td>
<td>37%</td>
<td>48%</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>Facebook registration page</td>
<td>13%</td>
<td>47%</td>
<td>24%</td>
<td>17%</td>
</tr>
<tr>
<td>Email to a friend</td>
<td>18%</td>
<td>40%</td>
<td>29%</td>
<td>13%</td>
</tr>
<tr>
<td>Paid search</td>
<td>26%</td>
<td>55%</td>
<td>17%</td>
<td>2%</td>
</tr>
<tr>
<td>Blog registration page</td>
<td>24%</td>
<td>44%</td>
<td>22%</td>
<td>10%</td>
</tr>
<tr>
<td>Co-registration programs</td>
<td>16%</td>
<td>53%</td>
<td>24%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=45
Email list growth tactics difficulty and effectiveness

Please indicate the degree of DIFFICULTY (time, effort and expense) and the level of EFFECTIVENESS for each of the email list growth tactics your organization is using.

**Email to a Friend**

- **Very effective**: 13% Very easy, 5% Somewhat easy, 0% Somewhat difficult, 0% Very difficult

- **Somewhat effective**: 23% Very easy, 11% Somewhat easy, 5% Somewhat difficult, 1% Very difficult

- **Somewhat ineffective**: 14% Very easy, 9% Somewhat easy, 3% Somewhat difficult, 3% Very difficult

- **Very ineffective**: 7% Very easy, 3% Somewhat easy, 1% Somewhat difficult, 2% Very difficult

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=115
Chart 3.15  Email list growth tactics difficulty and effectiveness

Please indicate the degree of DIFFICULTY (time, effort and expense) and the level of EFFECTIVENESS for each of the email list growth tactics your organization is using.

Online Events

<table>
<thead>
<tr>
<th>Very effective</th>
<th>18%</th>
<th>13%</th>
<th>6%</th>
<th>0%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Somewhat effective</td>
<td>9%</td>
<td>22%</td>
<td>15%</td>
<td>1%</td>
</tr>
<tr>
<td>Somewhat ineffective</td>
<td>1%</td>
<td>5%</td>
<td>7%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=150
Chart 3.16 Email list growth tactics difficulty and effectiveness

Please indicate the degree of DIFFICULTY (time, effort and expense) and the level of EFFECTIVENESS for each of the email list growth tactics your organization is using.

**Offline Events**

- **Very effective**: 13%
- **Somewhat effective**: 10%, 24%, 19%, 3%
- **Somewhat ineffective**: 7%, 5%, 9%, 1%
- **Very ineffective**: 1%, 1%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=182
Chart 3.17 Email list growth tactics difficulty and effectiveness

Please indicate the degree of DIFFICULTY (time, effort and expense) and the level of EFFECTIVENESS for each of the email list growth tactics your organization is using.

Paid Search

<table>
<thead>
<tr>
<th></th>
<th>Very effective</th>
<th>Somewhat effective</th>
<th>Somewhat ineffective</th>
<th>Very ineffective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage</td>
<td>9%</td>
<td>10%</td>
<td>7%</td>
<td>0%</td>
</tr>
<tr>
<td>Rating</td>
<td>9%</td>
<td>6%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Source</td>
<td>©2013 MarketingSherpa Email Marketing Benchmark Survey</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Methodology</td>
<td>Fielded December 2012, N=111</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Chart 3.18  Email list growth tactics difficulty and effectiveness

Please indicate the degree of DIFFICULTY (time, effort and expense) and the level of EFFECTIVENESS for each of the email list growth tactics your organization is using.

Co-registration Programs

<table>
<thead>
<tr>
<th>Difficulty Level</th>
<th>Very effective</th>
<th>Somewhat effective</th>
<th>Somewhat ineffective</th>
<th>Very ineffective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very effective</td>
<td>7%</td>
<td>5%</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>Somewhat effective</td>
<td>9%</td>
<td>23%</td>
<td>18%</td>
<td>2%</td>
</tr>
<tr>
<td>Somewhat ineffective</td>
<td>2%</td>
<td>20%</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Very ineffective</td>
<td>2%</td>
<td>5%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=44
Chart 3.19  Email list growth tactics difficulty and effectiveness

Please indicate the degree of DIFFICULTY (time, effort and expense) and the level of EFFECTIVENESS for each of the email list growth tactics your organization is using.

**Registration During Purchase**

- **Very effective**
  - 39%
- **Somewhat effective**
  - 10%
  - 15%
  - 5%
  - 1%
- **Somewhat ineffective**
  - 2%
  - 3%
  - 1%
  - 1%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=157
Chart 3.20  Email list growth tactics difficulty and effectiveness

Please indicate the degree of DIFFICULTY (time, effort and expense) and the level of EFFECTIVENESS for each of the email list growth tactics your organization is using.

Website Registration Page

Very effective: 24% Very easy, 14% Somewhat easy, 2% Somewhat difficult, 2% Very difficult

Somewhat effective: 17% Very easy, 21% Somewhat easy, 8% Somewhat difficult, 1% Very difficult

Somewhat ineffective: 4% Very easy, 5% Somewhat easy, 2% Somewhat difficult, 1% Very difficult

Very ineffective: 1% Very easy, 1% Somewhat easy, 1% Somewhat difficult, 1% Very difficult

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=311
Chart 3.21 Email list growth tactics difficulty and effectiveness

Please indicate the degree of DIFFICULTY (time, effort and expense) and the level of EFFECTIVENESS for each of the email list growth tactics your organization is using.

**Blog Registration Page**

- **Very effective**
  - Very effective: 18%
  - Somewhat easy: 6%

- **Somewhat effective**
  - Very easy: 22%
  - Somewhat easy: 18%
  - Somewhat difficult: 3%
  - Very difficult: 2%

- **Somewhat ineffective**
  - Very easy: 7%
  - Somewhat easy: 8%
  - Somewhat difficult: 7%
  - Very difficult: 1%

- **Very ineffective**
  - Very easy: 3%
  - Somewhat easy: 3%
  - Somewhat difficult: 3%
  - Very difficult: 2%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=106
Chart 3.22  Email list growth tactics difficulty and effectiveness

Please indicate the degree of DIFFICULTY (time, effort and expense) and the level of EFFECTIVENESS for each of the email list growth tactics your organization is using.

Social Media Sharing Buttons in Email

- **Very effective**: 6% Very easy, 2% Somewhat easy
- **Somewhat effective**: 16% Very easy, 20% Somewhat easy, 4% Somewhat difficult
- **Somewhat ineffective**: 17% Very easy, 11% Somewhat easy, 6% Somewhat difficult, 1% Very difficult
- **Very ineffective**: 7% Very easy, 6% Somewhat easy, 2% Somewhat difficult, 1% Very difficult

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=170
Chart 3.23 Email list growth tactics difficulty and effectiveness

Please indicate the degree of DIFFICULTY (time, effort and expense) and the level of EFFECTIVENESS for each of the email list growth tactics your organization is using.

Facebook Registration Page

- **Very effective**: 9% Very easy, 3% Somewhat easy, 1% Somewhat difficult
- **Somewhat effective**: 8% Very easy, 27% Somewhat easy, 12% Somewhat difficult
- **Somewhat ineffective**: 6% Very easy, 9% Somewhat easy, 8% Somewhat difficult, 1% Very difficult
- **Very ineffective**: 6% Very easy, 6% Somewhat easy, 2% Somewhat difficult, 1% Very difficult

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=124
Chart 3.24 Form data collection

Which form data do you collect in the registration process for your email program?

- Email address: 100%
- Name: 70%
- ZIP code: 35%
- State: 35%
- Telephone Number: 33%
- Country: 29%
- Street Address: 26%
- Other: 22%
- Age: 12%
- Gender: 12%
- Salutation: 8%
- Fax Number: 3%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=347
Which form data do you collect in the registration process for your email program?

- Email address: 100%
- Name: 72%
- ZIP code: 38%
- State: 41%
- Telephone Number: 22%
- Country: 31%
- Street Address: 25%
- Other: 10%
- Age: 22%
- Gender: 24%
- Salutation: 9%
- Fax Number: 1%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=68
Chart 3.26 Form data collection

Which form data do you collect in the registration process for your email program?

- **Email address**: 100%
- **Name**: 74%
- **ZIP code**: 31%
- **State**: 35%
- **Telephone Number**: 37%
- **Country**: 31%
- **Street Address**: 23%
- **Other**: 31%
- **Age**: 6%
- **Gender**: 4%
- **Salutation**: 9%
- **Fax Number**: 4%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=191
Chart 3.27 Form data collection

Which form data do you collect in the registration process for your email program?

- Email address: 99%
- Name: 65%
- ZIP code: 41%
- State: 32%
- Telephone Number: 38%
- Country: 24%
- Street Address: 35%
- Other: 14%
- Age: 16%
- Gender: 20%
- Salutation: 6%
- Fax Number: 4%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=79
Chart 3.28 Effective tactics for registering new email subscribers

What has been the most effective tactic for your organization to register new email subscribers?

- Whitepaper or other premium content: 29%
- Webinar: 19%
- Exclusive access/offer: 19%
- Discount or coupon: 19%
- Sweepstakes: 10%
- Gift Card: 6%
- Not applicable or don't know: 17%
- Other: 14%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=161
Chart 3.29 Effective tactics for registering new email subscribers

What has been the most effective tactic for your organization to register new email subscribers?

- Whitepaper or other premium content: 43%
- Webinar: 27%
- Exclusive access/offer: 20%
- Discount or coupon: 14%
- Sweepstakes: 7%
- Gift Card: 4%
- Not applicable or don't know: 19%
- Other: 14%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=81
Chart 3.30 Tactics utilized to improve email relevance and engagement

Which of the following tactics is your organization using to improve the relevance and engagement of email content delivered to subscribers?

- Automatically send email based on triggers: 39%
- Segment email campaigns based on behavior: 37%
- Dynamically personalize email content (e.g. first name in subject line, geo-location content): 36%
- Segment email campaigns based on sales cycle: 28%
- Allow subscribers to specify email preferences via a robust preference center: 21%
- Include surveys, trivia or games: 18%
- Use loyalty / reward programs: 14%
- Dedicate resources to produce content for each stage in the buying process: 12%
- Make use of animated GIF images or video in design: 11%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=626
Chart 3.31 Tactics utilized to improve email relevance and engagement

Which of the following tactics is your organization using to improve the relevance and engagement of email content delivered to subscribers?

- Automatically send email based on triggers: 48%
- Segment email campaigns based on behavior: 43%
- Dynamically personalize email content (e.g., first name in subject line, geo-location content): 41%
- Segment email campaigns based on sales cycle: 33%
- Allow subscribers to specify email preferences via a robust preference center: 24%
- Include surveys, trivia or games: 15%
- Use loyalty / reward programs: 21%
- Dedicate resources to produce content for each stage in the buying process: 11%
- Make use of animated GIF images or video in design: 15%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=143
Chart 3.32 Tactics utilized to improve email relevance and engagement

Which of the following tactics is your organization using to improve the relevance and engagement of email content delivered to subscribers?

- Automatically send email based on triggers: 40%
- Segment email campaigns based on behavior: 36%
- Dynamically personalize email content (e.g., first name in subject line, geo-location content): 38%
- Segment email campaigns based on sales cycle: 30%
- Allow subscribers to specify email preferences via a robust preference center: 21%
- Include surveys, trivia or games: 18%
- Use loyalty / reward programs: 10%
- Dedicate resources to produce content for each stage in the buying process: 15%
- Make use of animated GIF images or video in design: 9%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=332
Chart 3.33 Tactics utilized to improve email relevance and engagement

Which of the following tactics is your organization using to improve the relevance and engagement of email content delivered to subscribers?

- Automatically send email based on triggers: 32%
- Segment email campaigns based on behavior: 36%
- Dynamically personalize email content (e.g., first name in subject line, geo-location content): 29%
- Segment email campaigns based on sales cycle: 23%
- Allow subscribers to specify email preferences via a robust preference center: 16%
- Include surveys, trivia or games: 19%
- Use loyalty / reward programs: 15%
- Dedicate resources to produce content for each stage in the buying process: 6%
- Make use of animated GIF images or video in design: 11%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=140
## Chart 3.34 Subscriber segmentation attributes

Can you segment subscriber data into separate lists based on the following attributes?

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Yes</th>
<th>No</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email engagement behavior</td>
<td>55%</td>
<td>29%</td>
<td>16%</td>
</tr>
<tr>
<td>Purchase history</td>
<td>53%</td>
<td>30%</td>
<td>16%</td>
</tr>
<tr>
<td>Location in sales pipeline</td>
<td>38%</td>
<td>43%</td>
<td>19%</td>
</tr>
<tr>
<td>User-declared personal preferences</td>
<td>38%</td>
<td>43%</td>
<td>19%</td>
</tr>
<tr>
<td>Email viewing device habits</td>
<td>28%</td>
<td>49%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥115
Chart 3.35 Email deliverability improvement tactics

Which of the following tactics is your organization using to improve email deliverability rates?

- Provide an easy unsubscribe process: 62%
- Measure and remove hard bounces: 51%
- Clean lists regularly: 41%
- Remove inactive subscribers: 39%
- Maintain an opt-in only subscriber list: 39%
- Evaluate soft bounces: 27%
- Request to be white listed: 22%
- Authenticate Sender ID, SPF, or DKIM: 21%
- Monitor inbox placement rate: 19%
- Launch reactivation campaigns: 17%
- Learn reputation score: 15%
- Sign up for feedback loops: 13%
- Subscribe to a black list monitoring service: 11%
- Send repermission campaigns: 7%
- Seek certification: 7%
- Don't know / Not Applicable: 12%
- Other: 2%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=593
Chart 3.36 Email deliverability tactics difficulty and effectiveness

Please indicate the degree of DIFFICULTY (time, effort and expense) and the level of EFFECTIVENESS for each of the email deliverability improvement tactics your organization is using.

Launch Reactivation Campaigns

- **Very easy**: 6% Very effective, 2% Somewhat effective, 2% Somewhat ineffective, 2% Very ineffective
- **Somewhat easy**: 9% Very effective, 31% Somewhat effective, 6% Somewhat ineffective, 1% Very ineffective
- **Somewhat difficult**: 6% Very effective, 18% Somewhat effective, 13% Somewhat ineffective
- **Very difficult**: 1% Very effective, 2% Somewhat effective, 2% Somewhat ineffective

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=87
Chart 3.37 Email deliverability tactics difficulty and effectiveness

Please indicate the degree of DIFFICULTY (time, effort and expense) and the level of EFFECTIVENESS for each of the email deliverability improvement tactics your organization is using.

Monitor Inbox Placement Rate

<table>
<thead>
<tr>
<th>Difficulty</th>
<th>Very effective</th>
<th>Somewhat effective</th>
<th>Somewhat ineffective</th>
<th>Very ineffective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very easy</td>
<td>17%</td>
<td>12%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Somewhat easy</td>
<td>10%</td>
<td>33%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Somewhat difficult</td>
<td>1%</td>
<td>9%</td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>Very difficult</td>
<td>2%</td>
<td>1%</td>
<td>1%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=98
Chart 3.38 Email deliverability tactics difficulty and effectiveness

Please indicate the degree of DIFFICULTY (time, effort and expense) and the level of EFFECTIVENESS for each of the email deliverability improvement tactics your organization is using.

Measure and Remove Hard Bounces

<table>
<thead>
<tr>
<th>Difficulty</th>
<th>Very effective</th>
<th>Somewhat effective</th>
<th>Somewhat ineffective</th>
<th>Very ineffective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very easy</td>
<td>33%</td>
<td></td>
<td></td>
<td>10%</td>
</tr>
<tr>
<td>Somewhat easy</td>
<td>15%</td>
<td>21%</td>
<td>2%</td>
<td>0%</td>
</tr>
<tr>
<td>Somewhat difficult</td>
<td>3%</td>
<td>10%</td>
<td>2%</td>
<td>0%</td>
</tr>
<tr>
<td>Very difficult</td>
<td>1%</td>
<td>1%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=278
Chart 3.39 Email deliverability tactics difficulty and effectiveness

Please indicate the degree of DIFFICULTY (time, effort and expense) and the level of EFFECTIVENESS for each of the email deliverability improvement tactics your organization is using.

Evaluate Soft Bounces

<table>
<thead>
<tr>
<th></th>
<th>Very effective</th>
<th>Somewhat effective</th>
<th>Somewhat ineffective</th>
<th>Very ineffective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very easy</td>
<td>16%</td>
<td>14%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Somewhat easy</td>
<td>8%</td>
<td>22%</td>
<td>1%</td>
<td></td>
</tr>
<tr>
<td>Somewhat difficult</td>
<td>3%</td>
<td>22%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>Very difficult</td>
<td>3%</td>
<td>1%</td>
<td>1%</td>
<td></td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=143
Chart 3.40 Email deliverability tactics difficulty and effectiveness

Please indicate the degree of DIFFICULTY (time, effort and expense) and the level of EFFECTIVENESS for each of the email deliverability improvement tactics your organization is using.

Remove Inactive Subscribers

<table>
<thead>
<tr>
<th>Difficulty</th>
<th>Very effective</th>
<th>Somewhat effective</th>
<th>Somewhat ineffective</th>
<th>Very ineffective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very easy</td>
<td>27%</td>
<td>9%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Somewhat easy</td>
<td>17%</td>
<td>22%</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Somewhat difficult</td>
<td>8%</td>
<td>10%</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>Very difficult</td>
<td>0%</td>
<td>0%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=208
Chart 3.41 Email deliverability tactics difficulty and effectiveness

Please indicate the degree of DIFFICULTY (time, effort and expense) and the level of EFFECTIVENESS for each of the email deliverability improvement tactics your organization is using.

**Sign Up for Feedback Loops**

<table>
<thead>
<tr>
<th>Difficulty Level</th>
<th>Very effective</th>
<th>Somewhat effective</th>
<th>Somewhat ineffective</th>
<th>Very ineffective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very easy</td>
<td>19%</td>
<td>13%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Somewhat easy</td>
<td>19%</td>
<td>21%</td>
<td>1%</td>
<td></td>
</tr>
<tr>
<td>Somewhat difficult</td>
<td>6%</td>
<td>10%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>Very difficult</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td></td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=70
Chart 3.42 Email deliverability tactics difficulty and effectiveness

Please indicate the degree of DIFFICULTY (time, effort and expense) and the level of EFFECTIVENESS for each of the email deliverability improvement tactics your organization is using.

**Request to be Whitelisted**

<table>
<thead>
<tr>
<th>Difficulty Level</th>
<th>Very effective</th>
<th>Somewhat effective</th>
<th>Somewhat ineffective</th>
<th>Very ineffective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very easy</td>
<td>15%</td>
<td>12%</td>
<td>4%</td>
<td>1%</td>
</tr>
<tr>
<td>Somewhat easy</td>
<td>10%</td>
<td>22%</td>
<td>4%</td>
<td></td>
</tr>
<tr>
<td>Somewhat difficult</td>
<td>9%</td>
<td>9%</td>
<td>6%</td>
<td>1%</td>
</tr>
<tr>
<td>Very difficult</td>
<td>3%</td>
<td>2%</td>
<td>2%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=113
Chart 3.43 Email deliverability tactics difficulty and effectiveness

Please indicate the degree of DIFFICULTY (time, effort and expense) and the level of EFFECTIVENESS for each of the email deliverability improvement tactics your organization is using.

Subscribe to a Blacklist Monitoring Service

- Very easy: 29% Very effective, 13% Somewhat effective, 2% Somewhat ineffective, 2% Very ineffective
- Somewhat easy: 9% Very effective, 25% Somewhat effective, 7% Somewhat ineffective, 2% Very ineffective
- Somewhat difficult: 5% Very effective, 7% Somewhat effective, 2% Somewhat ineffective, 2% Very ineffective
- Very difficult: 2% Very effective

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=56
Chart 3.44 Email deliverability tactics difficulty and effectiveness

Please indicate the degree of DIFFICULTY (time, effort and expense) and the level of EFFECTIVENESS for each of the email deliverability improvement tactics your organization is using.

Learn Reputation Score

<table>
<thead>
<tr>
<th>Difficulty</th>
<th>Very effective</th>
<th>Somewhat effective</th>
<th>Somewhat ineffective</th>
<th>Very ineffective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very easy</td>
<td>32%</td>
<td>12%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Somewhat easy</td>
<td>13%</td>
<td>24%</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>Somewhat difficult</td>
<td>3%</td>
<td>3%</td>
<td>1%</td>
<td></td>
</tr>
<tr>
<td>Very difficult</td>
<td>1%</td>
<td></td>
<td>1%</td>
<td></td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=76
Chart 3.45 Email deliverability tactics difficulty and effectiveness

Please indicate the degree of DIFFICULTY (time, effort and expense) and the level of EFFECTIVENESS for each of the email deliverability improvement tactics your organization is using.

Authenticate Sender ID, SPF, or DKIM

- Very easy: 28% - Somewhat effective: 8% - Very ineffective: 1%
- Somewhat easy: 19% - Very effective: 22% - Somewhat ineffective: 2% - Very ineffective: 1%
- Somewhat difficult: 3% - Somewhat effective: 11% - Very ineffective: 5%
- Very difficult: 1% - Very effective: 5% - Somewhat ineffective: 1%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=101
Email Marketing Benchmark Report

CHAPTER 4
THE MARKETER

meclabs verified
February 2013

marketing sherpa
The Marketer: Points to Consider

When asked to offer insights learned from their own email marketing efforts, one anonymous marketer wrote, “Email marketing, even as basic[ally] as we did it in 2012, outperformed all other forms of online marketing combined. [Thus,] we are investing much more in email. It works better than PPC, better than online display ads, and provides a channel for content marketing.”

As we bring the focus of our data back to you, the marketer, we analyze the specific elements that comprise successful – or unsuccessful – email strategy and execution. Our surveyed marketers helped us determine:

- The effectiveness of different email send times
- Other marketing channels integrated into email programs
- Customers’ mobile email adoption
- Email optimization techniques and testing practices
The Marketer: Points to Consider

**What is the most effective time to send?**

Apparently, email recipients – like many of us – need a day or two to settle into their weeks. When asked how effective emails are for each day of the week, Tuesday (26%) and Wednesday (23%) were, by far, considered the most effective days to send, by surveyed marketers, overall (Chart 4.1).

Online retail appears to balance email send effectiveness, as results were much more evenly distributed for B2C companies, with no fewer than 14% and no greater than 29% of respondents indicating any one day was “most effective.” (Chart 4.2).

More specifically, companies specifically within retail, e-commerce or wholesale distribution showed even less discrepancy between days deemed “most effective,” with this distribution ranging from 17% to 28% (Chart 4.7).

Unsurprisingly, Saturday (39%) and Sunday (42%) were considered “least effective” by a significant portion of respondents (Chart 4.1).
The Marketer: Points to Consider

Points to Consider
Have you performed any testing of your current email send times? What types of variables did you test? Have you noticed any significant movement in your email deliverability and open rate by shifting to different days and/or times of day when sending?

WHAT MARKETING CHANNELS DO ORGANIZATIONS INTEGRATE WITH EMAIL?
Near the end of the 2013 Email Marketing Benchmark Survey, we asked an open-ended free response question, in hope of obtaining some honest, unique, unprompted thoughts about this channel. We noticed that one of the predominant themes we found was email integration with other marketing channels.

One marketer considered integration an area of need, saying, “[A] big concern is lack of integration with other marketing channels. Many isolated islands of activity rather than a coordinated, integrated and consistent strategy.”

Overwhelmingly, 75% of surveyed marketers indicated they integrated their websites with email, nearly 20 percentage points greater than the second-most selected option, “social media” (56%) (Chart 4.13).
The Marketer: Points to Consider

Consumer-focused organizations placed considerably more emphasis on social media/email integration, as 68% of these marketers were doing so in their email campaigns (Chart 4.14).

Only 21% of respondents currently integrate this channel with their email programs, placing mobile eight fewer percentage points behind a somewhat dated tactic, “direct mail.” (Chart 4.13). This is somewhat perplexing, considering our surveyed marketers estimated 25% of their subscribers read email on mobile devices (Chart 4.17).

One surveyed marketer offered, “Maybe it is the ‘chicken or the egg’ scenario between the pervasiveness of smartphones or social media, but I believe it is [the] nexus between smartphones and the ‘where I am now’ that is the most important factor.”

Another expressed concern with the resources necessary to adequately implement mobile into their plans, saying, “Managing to produce emails which are pleasant to look at while getting your CTA through, [and] while accounting for all the quirks of the different email clients is hard enough, let alone having to now also look at adjusting them for vastly different-sized screens and capabilities. Keeping on top of all the technical aspects is a full-time job, and reduces the abilities of being able to create suitable new templates in-house with our current resources.”
The Marketer: Points to Consider

Perhaps message delivery was a problem for organizations, as **58% of respondents indicated they were not designing emails to accurately render on mobile devices** (Chart 4.18).

One marketer indicated he was conscious of how mobile “changes how people interact with email and the formats we must use to remain effective. Much of our learning is based on desktop behavior, so we will need to make sure we do not take those insights forward without validating them for the new mobile environment.”

**Points to Consider**

What is your take on mobile email? Do you feel it is important to create new and/or modified templates to accommodate a wider range of mobile devices? If you have created more-specific templates, have you seen an improvement in open rates as a result? Has the recent growth in use of larger-screened tablets made you reconsider your mobile template design strategy?

**How are marketers optimizing their email marketing efforts?**

“Testing is key!” exclaimed one surveyed marketer, when asked to offer marketing insights. Yet, somewhat surprisingly, especially given email’s standing as a venerable marketing tactic, our respondents were fairly evenly divided on their optimization techniques. While “analysis of past metrics” was chosen by a majority of respondents (59%), only six percentage points separated the next three techniques – “testing” (47%), “optimization without testing” (43%) and “customer feedback/survey” (41%) (Chart 4.20).
The Marketer: Points to Consider

Encouragingly, just 19% of respondents indicated they performed no email testing or optimization techniques.

Of those marketers who test email efforts, a significant 86% tested subject lines. This was distantly followed by “call-to-action” (62%) and “message” (58%). After these top selections, respondents were largely divided, with no one category selected by more than 48% – or fewer than 26% – of surveyed marketers (Chart 4.21).

B2C marketers placed less emphasis on testing calls-to-action (52%) (Chart 4.22) as their B2B/B2G counterparts (66%) (Chart 4.23). And, while consumer-focused organizations tested overall email layout and images (58%) more regularly than B2B/B2G outlets (43%), both sets of marketers tested similarly for mobile layout and imagery (27% for each).

Points to Consider

What email elements are you currently testing? Do agree with our respondents in their belief that testing subject lines is paramount in email optimization? Are the messages delivered in your email imagery, content (and even subsequent landing pages) consistent with what is offered in your subject lines?
Chart 4.1 Daily email effectiveness
How effective are emails sent of each day of the week?

<table>
<thead>
<tr>
<th>Day</th>
<th>1 Least Effective</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5 Most Effective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>16%</td>
<td>21%</td>
<td>30%</td>
<td>17%</td>
<td>15%</td>
</tr>
<tr>
<td>Tuesday</td>
<td>3% 7%</td>
<td>29%</td>
<td>35%</td>
<td>26%</td>
<td></td>
</tr>
<tr>
<td>Wednesday</td>
<td>4% 8%</td>
<td>32%</td>
<td>34%</td>
<td>23%</td>
<td></td>
</tr>
<tr>
<td>Thursday</td>
<td>4% 11%</td>
<td>34%</td>
<td>33%</td>
<td>18%</td>
<td></td>
</tr>
<tr>
<td>Friday</td>
<td>19%</td>
<td>26%</td>
<td>30%</td>
<td>16%</td>
<td>9%</td>
</tr>
<tr>
<td>Saturday</td>
<td>39%</td>
<td>22%</td>
<td>18%</td>
<td>9%</td>
<td>12%</td>
</tr>
<tr>
<td>Sunday</td>
<td>42%</td>
<td>16%</td>
<td>21%</td>
<td>12%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥66
Chart 4.2 Daily email effectiveness

How effective are emails sent of each day of the week?

B2C

<table>
<thead>
<tr>
<th>Day</th>
<th>1 Least Effective</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5 Most Effective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>13%</td>
<td>17%</td>
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<td>Tuesday</td>
<td>4%</td>
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<td>24%</td>
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<td>29%</td>
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<tr>
<td>Wednesday</td>
<td>3%</td>
<td>16%</td>
<td>29%</td>
<td>31%</td>
<td>21%</td>
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<tr>
<td>Thursday</td>
<td>3%</td>
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<td>20%</td>
<td>12%</td>
<td>20%</td>
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<tr>
<td>Sunday</td>
<td>23%</td>
<td>19%</td>
<td>26%</td>
<td>14%</td>
<td>18%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥78
Chart 4.3 Daily email effectiveness

How effective are emails sent of each day of the week?

B2B and/or B2G

<table>
<thead>
<tr>
<th>Day</th>
<th>1 Least Effective</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5 Most Effective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>18%</td>
<td>23%</td>
<td>30%</td>
<td>14%</td>
<td>15%</td>
</tr>
<tr>
<td>Tuesday</td>
<td>3% 5%</td>
<td>28%</td>
<td>35%</td>
<td>28%</td>
<td></td>
</tr>
<tr>
<td>Wednesday</td>
<td>3% 6%</td>
<td>33%</td>
<td>33%</td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td>Thursday</td>
<td>4% 11%</td>
<td>34%</td>
<td>32%</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>Friday</td>
<td>22%</td>
<td>30%</td>
<td>26%</td>
<td>14%</td>
<td>8%</td>
</tr>
<tr>
<td>Saturday</td>
<td>53%</td>
<td>17%</td>
<td>13%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>Sunday</td>
<td>55%</td>
<td>12%</td>
<td>20%</td>
<td>7%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥132
**Chart 4.4 Daily email effectiveness**

*How effective are emails sent of each day of the week?*

<table>
<thead>
<tr>
<th>Day</th>
<th>1 Least Effective</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5 Most Effective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>17%</td>
<td>24%</td>
<td>24%</td>
<td>21%</td>
<td>14%</td>
</tr>
<tr>
<td>Tuesday</td>
<td>2% 7%</td>
<td>33%</td>
<td>37%</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>Wednesday</td>
<td>5% 5%</td>
<td>32%</td>
<td>39%</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>Thursday</td>
<td>4% 10%</td>
<td>37%</td>
<td>36%</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Friday</td>
<td>16%</td>
<td>20%</td>
<td>40%</td>
<td>18%</td>
<td>6%</td>
</tr>
<tr>
<td>Saturday</td>
<td>32%</td>
<td>25%</td>
<td>26%</td>
<td>6%</td>
<td>11%</td>
</tr>
<tr>
<td>Sunday</td>
<td>38%</td>
<td>21%</td>
<td>19%</td>
<td>17%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥52
Chart 4.5 Daily email effectiveness
How effective are emails sent of each day of the week?

Marketing Agency or Consultancy

<table>
<thead>
<tr>
<th>Day</th>
<th>1 Least Effective</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5 Most Effective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>19%</td>
<td>23%</td>
<td>20%</td>
<td>24%</td>
<td>14%</td>
</tr>
<tr>
<td>Tuesday</td>
<td>3% 5%</td>
<td>24%</td>
<td>45%</td>
<td>22%</td>
<td></td>
</tr>
<tr>
<td>Wednesday</td>
<td>4% 7%</td>
<td>24%</td>
<td>40%</td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td>Thursday</td>
<td>2% 16%</td>
<td>30%</td>
<td>34%</td>
<td>17%</td>
<td></td>
</tr>
<tr>
<td>Friday</td>
<td>18% 31%</td>
<td>24%</td>
<td>23%</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>Saturday</td>
<td>45%</td>
<td>21%</td>
<td>12%</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Sunday</td>
<td>49%</td>
<td>22%</td>
<td>13%</td>
<td>9%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥55
Chart 4.6 Daily email effectiveness

How effective are emails sent of each day of the week?

Professional, Personal and Financial Services

<table>
<thead>
<tr>
<th>Day</th>
<th>1 Least Effective</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5 Most Effective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>18%</td>
<td>30%</td>
<td>35%</td>
<td>12%</td>
<td>5%</td>
</tr>
<tr>
<td>Tuesday</td>
<td>3% 10%</td>
<td>32%</td>
<td>28%</td>
<td>27%</td>
<td></td>
</tr>
<tr>
<td>Wednesday</td>
<td>5% 9%</td>
<td>33%</td>
<td>29%</td>
<td>24%</td>
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<tr>
<td>Thursday</td>
<td>5% 10%</td>
<td>40%</td>
<td>34%</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>Friday</td>
<td>20%</td>
<td>37%</td>
<td>30%</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>Saturday</td>
<td>58%</td>
<td>16%</td>
<td>18%</td>
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<td>3%</td>
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<tr>
<td>Sunday</td>
<td>53%</td>
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<td>24%</td>
<td>3%</td>
<td></td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥38
### Chart 4.7 Daily email effectiveness

How effective are emails sent of each day of the week?

#### Retail, E-commerce, or Wholesale Distribution

<table>
<thead>
<tr>
<th>Day</th>
<th>1 Least Effective</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5 Most Effective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>11%</td>
<td>21%</td>
<td>20%</td>
<td>23%</td>
<td>25%</td>
</tr>
<tr>
<td>Tuesday</td>
<td>6%</td>
<td>9%</td>
<td>28%</td>
<td>28%</td>
<td>28%</td>
</tr>
<tr>
<td>Wednesday</td>
<td>6%</td>
<td>11%</td>
<td>35%</td>
<td>29%</td>
<td>18%</td>
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<td>Thursday</td>
<td>5%</td>
<td>8%</td>
<td>30%</td>
<td>38%</td>
<td>20%</td>
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<td>Friday</td>
<td>8%</td>
<td>16%</td>
<td>38%</td>
<td>20%</td>
<td>18%</td>
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<td>Saturday</td>
<td>19%</td>
<td>27%</td>
<td>27%</td>
<td>10%</td>
<td>17%</td>
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<tr>
<td>Sunday</td>
<td>20%</td>
<td>18%</td>
<td>24%</td>
<td>20%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥51
Chart 4.8 Daily email effectiveness

How effective are emails sent of each day of the week?

Software, Software as a Service or Video Games

<table>
<thead>
<tr>
<th>Day</th>
<th>1 Least Effective</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5 Most Effective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>25%</td>
<td>16%</td>
<td>29%</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>Tuesday</td>
<td>2% 7%</td>
<td>36%</td>
<td>28%</td>
<td>28%</td>
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<tr>
<td>Wednesday</td>
<td>4% 5%</td>
<td>37%</td>
<td>39%</td>
<td>16%</td>
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<tr>
<td>Thursday</td>
<td>4% 9%</td>
<td>29%</td>
<td>38%</td>
<td>21%</td>
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<tr>
<td>Friday</td>
<td>20%</td>
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<td>14%</td>
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<tr>
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<td>44%</td>
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<td>12%</td>
<td>12%</td>
<td>6%</td>
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<tr>
<td>Sunday</td>
<td>60%</td>
<td>9%</td>
<td>20%</td>
<td>11%</td>
<td></td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥35
Chart 4.9 Email campaign use for customer lifecycle management

Which of the following types of email campaigns does your organization use to manage your customer’s lifecycle? Please select all that apply.

- Nurturing: 64%
- Prospecting and qualifying leads: 53%
- Activation: 42%
- Retention: 41%
- Post-sale: 39%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=581
Chart 4.10 Email campaign use for customer lifecycle management

Which of the following types of email campaigns does your organization use to manage your customer's lifecycle? Please select all that apply. **B2C**

- **Nurturing**: 57%
- **Prospecting and qualifying leads**: 50%
- **Activation**: 56%
- **Retention**: 45%
- **Post-sale**: 53%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=153
Chart 4.11 Email campaign use for customer lifecycle management

Which of the following types of email campaigns does your organization use to manage your customer's lifecycle? Please select all that apply. **B2B and/or B2G**

- **Nurturing**: 69%
- **Prospecting and qualifying leads**: 57%
- **Activation**: 35%
- **Retention**: 41%
- **Post-sale**: 34%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=307
Which of the following types of email campaigns does your organization use to manage your customer's lifecycle? Please select all that apply. **B2B and B2C**

- Nurturing: 62%
- Prospecting and qualifying leads: 50%
- Activation: 47%
- Retention: 38%
- Post-sale: 41%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=131
Chart 4.13 Marketing channel email integration

Which marketing channels does your organization integrate with your email program?

- Website: 75%
- Social media: 56%
- Events (e.g. tradeshows, webinars): 40%
- Blogs: 35%
- SEO/ PPC: 31%
- Direct mail: 29%
- Mobile: 21%
- Print/catalog: 16%
- Public relations: 15%
- Teleprospecting: 13%
- SMS (text): 8%
- In-store advertising: 6%
- Broadcast: 4%
- Outdoor advertising: 2%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=579
Chart 4.14 Marketing channel email integration

Which marketing channels does your organization integrate with your email program?

- Website: 79%
- Social media: 68%
- Events (e.g. tradeshows, webinars): 29%
- Blogs: 36%
- SEO/PPC: 37%
- Direct mail: 26%
- Mobile: 24%
- Print/catalog: 21%
- Public relations: 12%
- Teleprospecting: 4%
- SMS (text): 13%
- In-store advertising: 14%
- Broadcast: 8%
- Outdoor advertising: 4%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=133
Chart 4.15 Marketing channel email integration

Which marketing channels does your organization integrate with your email program?

- Website: 76%
- Social media: 54%
- Events (e.g. tradeshows, webinars): 49%
- Blogs: 37%
- SEO/ PPC: 35%
- Direct mail: 32%
- Mobile: 17%
- Print/catalog: 14%
- Public relations: 19%
- Teleprospecting: 19%
- SMS (text): 8%
- In-store advertising: 2%
- Broadcast: 2%
- Outdoor advertising: 2%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=305
Chart 4.16 Marketing channel email integration

Which marketing channels does your organization integrate with your email program?

- Website: 73%
- Social media: 50%
- Events (e.g. tradeshows, webinars): 35%
- Blogs: 31%
- SEO/PPC: 21%
- Direct mail: 27%
- Mobile: 24%
- Print/catalog: 15%
- Public relations: 11%
- Teleprospecting: 8%
- SMS (text): 5%
- In-store advertising: 5%
- Broadcast: 8%
- Outdoor advertising: 2%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=131
Chart 4.17 Email subscribers utilizing mobile

Approximately what percentage of email subscribers read your organization's emails on mobile phones?

Average Percentage of Subscribers Reading Email on Mobile Devices

- **All**: 25%
- **B2C**: 27%
- **B2B and/or B2G**: 25%
- **Both B2B and B2C**: 23%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=18 to 76
Chart 4.18 Mobile email design

Are you designing your emails to render differently on mobile devices?

- Yes: 42%
- No: 58%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=145
Chart 4.19 Mobile email design
Are you designing your emails to render differently on mobile devices?

- Yes: 40%
- No: 60%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=70
Chart 4.20 Techniques utilized for email optimization

What email marketing optimization techniques were utilized by your organization in 2012? Please select all that apply.

- Data analysis of past campaign metrics: 59%
- Testing (A/B split, multivariate, usability): 47%
- Optimization without testing: 43%
- Customer feedback/survey: 41%
- Did not perform any email testing or optimization techniques: 19%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=574
Which of the following email campaign elements do you routinely test to optimize performance? Please select all that apply.

<table>
<thead>
<tr>
<th>Element</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject line</td>
<td>86%</td>
</tr>
<tr>
<td>Call-to-action</td>
<td>62%</td>
</tr>
<tr>
<td>Message (e.g. greeting, body, closing)</td>
<td>58%</td>
</tr>
<tr>
<td>Days of the week sent</td>
<td>48%</td>
</tr>
<tr>
<td>Layout and images</td>
<td>47%</td>
</tr>
<tr>
<td>Time of day sent</td>
<td>46%</td>
</tr>
<tr>
<td>Landing page</td>
<td>44%</td>
</tr>
<tr>
<td>Target audience</td>
<td>44%</td>
</tr>
<tr>
<td>Personalization</td>
<td>42%</td>
</tr>
<tr>
<td>From line</td>
<td>32%</td>
</tr>
<tr>
<td>Layout and images specifically for mobile viewing</td>
<td>26%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
</tr>
<tr>
<td>None of the above</td>
<td>2%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=264
Which of the following email campaign elements do you routinely test to optimize performance? Please select all that apply.

- Subject line: 87%
- Call-to-action: 52%
- Message (e.g. greeting, body, closing): 58%
- Days of the week sent: 52%
- Layout and images: 58%
- Time of day sent: 52%
- Landing page: 42%
- Target audience: 43%
- Personalization: 41%
- From line: 24%
- Layout and images specifically for mobile viewing: 27%
- Other: 2%
- None of the above: 1%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=264
Which of the following email campaign elements do you routinely test to optimize performance? Please select all that apply.

- Subject line: 85%
- Call-to-action: 66%
- Message (e.g., greeting, body, closing): 56%
- Days of the week sent: 47%
- Layout and images: 43%
- Time of day sent: 41%
- Landing page: 48%
- Target audience: 45%
- Personalization: 42%
- From line: 40%
- Layout and images specifically for mobile viewing: 27%
- Other: 2%
- None of the above: 2%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=121
Chart 4.24 Email campaign element testing and optimization

Which of the following email campaign elements do you routinely test to optimize performance? Please select all that apply.

- Subject line: 86%
- Call-to-action: 68%
- Message (e.g. greeting, body, closing): 63%
- Days of the week sent: 46%
- Layout and images: 41%
- Time of day sent: 47%
- Landing page: 39%
- Target audience: 42%
- Personalization: 41%
- From line: 27%
- Layout and images specifically for mobile viewing: 20%
- None of the above: 3%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=59
Chart 4.25 Testing and optimization budget used on email

What percentage of your optimization budget is used to test and optimize emails?

- All: 29%
- B2C: 32%
- B2B and/or B2G: 29%
- Both B2B and B2C: 26%
- Percentage of emails tested and optimized: 16%
- Percentage of email budget dedicated to testing and optimization: 15%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥62
### Chart 4.26 Testing practices implemented

*How routinely does your organization implement the following testing practices?*

<table>
<thead>
<tr>
<th>Testing Practice</th>
<th>Never</th>
<th>Very infrequently</th>
<th>Somewhat infrequently</th>
<th>Somewhat routinely</th>
<th>Very routinely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintain internal benchmarks</td>
<td>7%</td>
<td>12%</td>
<td>26%</td>
<td>32%</td>
<td>23%</td>
</tr>
<tr>
<td>Review test and decide on a follow-up test(s)</td>
<td>11%</td>
<td>27%</td>
<td>30%</td>
<td>18%</td>
<td>13%</td>
</tr>
<tr>
<td>Document findings at regularly scheduled times (opens, clicks, conversions)</td>
<td>5%</td>
<td>15%</td>
<td>20%</td>
<td>31%</td>
<td>28%</td>
</tr>
<tr>
<td>Define the research question, main objective and key metric before conducting a test</td>
<td>13%</td>
<td>23%</td>
<td>27%</td>
<td>25%</td>
<td>12%</td>
</tr>
<tr>
<td>Brainstorm challenges and opportunities for email optimization</td>
<td>6%</td>
<td>18%</td>
<td>33%</td>
<td>30%</td>
<td>14%</td>
</tr>
<tr>
<td>Utilize a specific testing methodology</td>
<td>15%</td>
<td>18%</td>
<td>30%</td>
<td>25%</td>
<td>11%</td>
</tr>
<tr>
<td>Track deliverability, open, clicks and conversion rates to document the entire impact of email on the marketing and sales funnel</td>
<td>2%</td>
<td>6%</td>
<td>10%</td>
<td>32%</td>
<td>50%</td>
</tr>
<tr>
<td>Segment lists to target a specific audience</td>
<td>7%</td>
<td>9%</td>
<td>18%</td>
<td>32%</td>
<td>34%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥259
## Chart 4.27 Testing practices implemented

*How routinely does your organization implement the following testing practices?*

<table>
<thead>
<tr>
<th>Practice</th>
<th>Very infrequently</th>
<th>Somewhat infrequently</th>
<th>Somewhat routinely</th>
<th>Very routinely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintain internal benchmarks</td>
<td>26%</td>
<td>35%</td>
<td>18%</td>
<td>12%</td>
</tr>
<tr>
<td>Review test and decide on a follow-up test(s)</td>
<td>21%</td>
<td>14%</td>
<td>36%</td>
<td>14%</td>
</tr>
<tr>
<td>Document findings at regularly scheduled times (opens, clicks, conversions)</td>
<td>37%</td>
<td>27%</td>
<td>16%</td>
<td>9%</td>
</tr>
<tr>
<td>Define the research question, main objective and key metric before conducting a test</td>
<td>13%</td>
<td>23%</td>
<td>25%</td>
<td>23%</td>
</tr>
<tr>
<td>Brainstorm challenges and opportunities for email optimization</td>
<td>14%</td>
<td>43%</td>
<td>23%</td>
<td>12%</td>
</tr>
<tr>
<td>Utilize a specific testing methodology</td>
<td>12%</td>
<td>30%</td>
<td>26%</td>
<td>20%</td>
</tr>
<tr>
<td>Track deliverability, open, clicks and conversion rates to document the entire impact of email on the marketing and sales funnel</td>
<td>64%</td>
<td>25%</td>
<td>4%</td>
<td>7%</td>
</tr>
<tr>
<td>Segment lists to target a specific audience</td>
<td>39%</td>
<td>19%</td>
<td>22%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥66
Chart 4.28 Testing practices implemented

*How routinely does your organization implement the following testing practices?*

<table>
<thead>
<tr>
<th>B2B and/or B2G</th>
<th>Never</th>
<th>Very infrequently</th>
<th>Somewhat infrequently</th>
<th>Somewhat routinely</th>
<th>Very routinely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintain internal benchmarks</td>
<td>7%</td>
<td>11%</td>
<td>31%</td>
<td>26%</td>
<td>24%</td>
</tr>
<tr>
<td>Review test and decide on a follow-up test(s)</td>
<td>11%</td>
<td>31%</td>
<td>25%</td>
<td>21%</td>
<td>11%</td>
</tr>
<tr>
<td>Document findings at regularly scheduled times (opens, clicks, conversions)</td>
<td>5%</td>
<td>13%</td>
<td>22%</td>
<td>34%</td>
<td>26%</td>
</tr>
<tr>
<td>Define the research question, main objective and key metric before conducting a test</td>
<td>14%</td>
<td>22%</td>
<td>29%</td>
<td>24%</td>
<td>12%</td>
</tr>
<tr>
<td>Brainstorm challenges and opportunities for email optimization</td>
<td>6%</td>
<td>21%</td>
<td>36%</td>
<td>23%</td>
<td>14%</td>
</tr>
<tr>
<td>Utilize a specific testing methodology</td>
<td>19%</td>
<td>17%</td>
<td>33%</td>
<td>18%</td>
<td>12%</td>
</tr>
<tr>
<td>Track deliverability, open, clicks and conversion rates to document the entire impact of email on the marketing and sales funnel</td>
<td>3%</td>
<td>5%</td>
<td>14%</td>
<td>34%</td>
<td>44%</td>
</tr>
<tr>
<td>Segment lists to target a specific audience</td>
<td>7%</td>
<td>11%</td>
<td>16%</td>
<td>34%</td>
<td>33%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥144
### Chart 4.29 Testing practices implemented

*How routinely does your organization implement the following testing practices?*

<table>
<thead>
<tr>
<th>Testing Practice</th>
<th>Never</th>
<th>Very infrequently</th>
<th>Somewhat infrequently</th>
<th>Somewhat routinely</th>
<th>Very routinely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintain internal benchmarks</td>
<td>4%</td>
<td>13%</td>
<td>21%</td>
<td>45%</td>
<td>17%</td>
</tr>
<tr>
<td>Review test and decide on a follow-up test(s)</td>
<td>8%</td>
<td>31%</td>
<td>38%</td>
<td>15%</td>
<td>8%</td>
</tr>
<tr>
<td>Document findings at regularly scheduled times (opens, clicks, conversions)</td>
<td>30%</td>
<td>20%</td>
<td>30%</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>Define the research question, main objective and key metric before conducting a test</td>
<td>13%</td>
<td>21%</td>
<td>25%</td>
<td>29%</td>
<td>13%</td>
</tr>
<tr>
<td>Brainstorm challenges and opportunities for email optimization</td>
<td>4%</td>
<td>14%</td>
<td>32%</td>
<td>36%</td>
<td>14%</td>
</tr>
<tr>
<td>Utilize a specific testing methodology</td>
<td>6%</td>
<td>19%</td>
<td>23%</td>
<td>43%</td>
<td>9%</td>
</tr>
<tr>
<td>Track deliverability, open, clicks and conversion rates to document the entire impact of email on the marketing and sales funnel</td>
<td>2%</td>
<td>6%</td>
<td>6%</td>
<td>52%</td>
<td></td>
</tr>
<tr>
<td>Segment lists to target a specific audience</td>
<td>2%</td>
<td>4%</td>
<td>15%</td>
<td>47%</td>
<td>32%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥47
## Chart 4.30 Testing practices implemented

*How routinely does your organization implement the following testing practices?*

### Organizations under 100 employees

<table>
<thead>
<tr>
<th>Practice</th>
<th>Never</th>
<th>Very infrequently</th>
<th>Somewhat infrequently</th>
<th>Somewhat routinely</th>
<th>Very routinely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintain internal benchmarks</td>
<td>8%</td>
<td>14%</td>
<td>26%</td>
<td>30%</td>
<td>22%</td>
</tr>
<tr>
<td>Review test and decide on a follow-up test(s)</td>
<td>12%</td>
<td>27%</td>
<td>27%</td>
<td>21%</td>
<td>12%</td>
</tr>
<tr>
<td>Document findings at regularly scheduled times (opens, clicks, conversions)</td>
<td>8%</td>
<td>17%</td>
<td>20%</td>
<td>28%</td>
<td>27%</td>
</tr>
<tr>
<td>Define the research question, main objective and key metric before conducting a test</td>
<td>14%</td>
<td>24%</td>
<td>30%</td>
<td>20%</td>
<td>12%</td>
</tr>
<tr>
<td>Brainstorm challenges and opportunities for email optimization</td>
<td>6%</td>
<td>19%</td>
<td>32%</td>
<td>30%</td>
<td>14%</td>
</tr>
<tr>
<td>Utilize a specific testing methodology</td>
<td>20%</td>
<td>19%</td>
<td>29%</td>
<td>21%</td>
<td>11%</td>
</tr>
<tr>
<td>Track deliverability, open, clicks and conversion rates to document the entire impact of email on the marketing and sales funnel</td>
<td>3%</td>
<td>7%</td>
<td>10%</td>
<td>34%</td>
<td>46%</td>
</tr>
<tr>
<td>Segment lists to target a specific audience</td>
<td>8%</td>
<td>13%</td>
<td>21%</td>
<td>29%</td>
<td>30%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥133
## Chart 4.31 Testing practices implemented

*How routinely does your organization implement the following testing practices?*

### Organizations over 100 employees

<table>
<thead>
<tr>
<th>Practice</th>
<th>Never</th>
<th>Very Infrequently</th>
<th>Somewhat Infrequently</th>
<th>Somewhat Routinely</th>
<th>Very Routinely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintain internal benchmarks</td>
<td>6%</td>
<td>8%</td>
<td>27%</td>
<td>34%</td>
<td>25%</td>
</tr>
<tr>
<td>Review test and decide on a follow-up test(s)</td>
<td>11%</td>
<td>27%</td>
<td>33%</td>
<td>14%</td>
<td>15%</td>
</tr>
<tr>
<td>Document findings at regularly scheduled times (opens, clicks, conversions)</td>
<td>2%</td>
<td>13%</td>
<td>21%</td>
<td>35%</td>
<td>28%</td>
</tr>
<tr>
<td>Define the research question, main objective and key metric before conducting a test</td>
<td>13%</td>
<td>21%</td>
<td>24%</td>
<td>30%</td>
<td>13%</td>
</tr>
<tr>
<td>Brainstorm challenges and opportunities for email optimization</td>
<td>6%</td>
<td>15%</td>
<td>34%</td>
<td>30%</td>
<td>14%</td>
</tr>
<tr>
<td>Utilize a specific testing methodology</td>
<td>10%</td>
<td>17%</td>
<td>31%</td>
<td>30%</td>
<td>11%</td>
</tr>
<tr>
<td>Track deliverability, open, clicks and conversion rates to document the entire impact of email on the marketing and sales funnel</td>
<td>1%</td>
<td>4%</td>
<td>10%</td>
<td>29%</td>
<td>56%</td>
</tr>
<tr>
<td>Segment lists to target a specific audience</td>
<td>6%</td>
<td>6%</td>
<td>15%</td>
<td>35%</td>
<td>39%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N≥125
Email Marketing Benchmark Report

METHODODOLOGY
MarketingSherpa Research Methodology

MarketingSherpa fielded the 2013 Email Marketing Benchmark Survey from December 10-26, 2012. The query took the form of an online survey, to which there were 1,095 qualified complete and partial responses from marketing and business professionals on six continents, including North America, Europe, Asia/Pacific, Australia, South/Central America and Africa.

The charts found within this Benchmark Report were selected for publication based on a combination of helpfulness of information to the marketer, and scientific validity. The number of responses, denoted on each chart with “N=”, and differentiation levels between respondent groups were both taken into account when determining the validity of charts.

Helpful insights may still be gleaned from highly differentiated but small response groups. However, each marketer should use their own judgment when interpreting charts with a low number of responses.

To ensure quality and relevance, submissions from respondents who indicated they were not engaged in marketing were excluded. On many dimensions, agency data was also broken out separately, to facilitate separate and comparative enquiries where natural differences exist. As such, the number of included responses is reported at the individual question level.
MarketingSherpa Research Methodology

The sampling method used is an incentivized non-probability voluntary sample composed of MarketingSherpa and MarketingExperiments registered subscribers having expressed the willingness (via opt-in) to receive research-related and commercial email messages from MECLABS Institute, and those responding to invitations promoted through the Facebook, LinkedIn and Twitter social media platforms.

The incentive for participating in the survey was a complimentary MarketingSherpa Special Report, *CMO Perspectives on Email Deliverability*, which was made available for download upon completion of the survey.

To request further information about the design or conduct of this survey-based study, please contact MarketingSherpa’s Director of Research at research@marketingsherpa.com.
Email Marketing Benchmark Report

DEMOGRAPHICS
Geographical distribution of respondents

North America: 75%
Europe: 13%
Asia: 5%
Africa: 1%
South America: 1%
Australia: 5%
Distribution of respondents by industry

Which single category best describes the type of organization you work for?

- Marketing Agency or Consultancy: 23%
- Software, Software as a Service (SaaS) or Video Games: 14%
- Retail, E-commerce, or Wholesale Distribution: 13%
- Professional, Personal or Financial Services including Banking: 12%
- Education, Association or Nonprofit: 9%
- Media or Publishing (online or offline): 7%
- Manufacturing, Construction or Packaged Goods: 7%
- Technology Equipment or Hardware: 5%
- Healthcare: 4%
- Travel or Hospitality: 3%
- Entertainment or Recreation: 2%
- Other: 1%
- Government and Military: 1%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=1,095
Distribution of respondents by organization size

Please select the approximate number of employees in your organization?

- More than 5,000: 9%
- 1,000 to 5,000: 10%
- 100 to 999: 24%
- 10 to 99: 26%
- 2 to 10: 21%
- I am self-employed (1 employee): 9%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=1,091
Distribution of respondents by customer type

Which best describes your organization's primary sales channel?

- We sell primarily to other businesses (B2B or B2G): 55%
- We sell to both businesses and consumers: 24%
- We sell primarily to consumers (B2C): 21%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=1,073
## Distribution of respondents by decision making authority

*Which best describes your role and marketing decision-making authority in the organization you work for?*

<table>
<thead>
<tr>
<th>Role Description</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chief marketing officer or senior executive with final marketing</td>
<td>34%</td>
</tr>
<tr>
<td>Marketing manager or supervisor with intermediate marketing</td>
<td>52%</td>
</tr>
<tr>
<td>Non-management marketing personnel with minimal decision making authority</td>
<td>14%</td>
</tr>
</tbody>
</table>

*Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey*

*Methodology: Fielded December 2012, N=248*
Distribution of email marketing facets by agency respondents

What facets of email marketing is your agency most frequently involved with to help clients succeed? Check all that apply (Agency only)

- Strategy: 81%
- Content Development: 72%
- Implementation and Deployment: 71%
- Monitoring and Reporting: 67%
- Design and Layout: 67%
- Testing and Optimization: 58%
- Other: 4%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=1,095
Distribution of respondents by average monthly email volume

What volume of emails does your organization send in the average month?

- 1 - 9,999: 40%
- 10,000 - 99,999: 21%
- 100,000 - 999,999: 20%
- 1,000,000 - 9,999,999: 12%
- More than 10 million: 7%

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=1,095
**Distribution of email marketing communicative value factors by executive respondents**

As CMO or the senior marketing executive in your organization, how important are the following factors in helping you determine and communicate the value of email marketing programs? (CMO only)

<table>
<thead>
<tr>
<th>Factor</th>
<th>Very important</th>
<th>Somewhat important</th>
<th>Somewhat unimportant</th>
<th>Very unimportant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post-click metrics like lead generation and sales conversion</td>
<td>78%</td>
<td>18%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Financial return on investment</td>
<td>68%</td>
<td>26%</td>
<td>5%</td>
<td>2%</td>
</tr>
<tr>
<td>Email performance metrics like opens, clickthroughs and bounce rates</td>
<td>51%</td>
<td>41%</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>A/B split or multivariate test results on email and landing pages</td>
<td>31%</td>
<td>46%</td>
<td>20%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: ©2013 MarketingSherpa Email Marketing Benchmark Survey
Methodology: Fielded December 2012, N=280
About MarketingSherpa LLC

MarketingSherpa is a primary research facility, wholly-owned by MECLABS, dedicated to determining what works in marketing via exclusive case studies, surveys, and results data analysis. Then we publish what we learn so our community of marketers and weekly readers can improve their results and train their teams.

Praised by The Economist, Harvard Business School’s Working Knowledge Site and Entrepreneur.com, MarketingSherpa is distinguished by offering practical, results-based marketing information researched and written by a staff of in-house reporters.

MarketingSherpa features:

- **Best Practices**: 1,000+ brand-side marketer case studies and 3,500+ creative samples
- **Research**: 2,000+ marketing and research abstracts
- **Instruction**: 800+ how-to articles
- **Newsletters**: 230,000+ marketers read weekly case studies on topics such as email, search, social, lead generation, lead nurturing, optimization and content marketing
- **Training**: 100+ live, hands-on training sessions providing practical and proven solutions
- **Summits**: 3 annual vendor-neutral, research-based marketing events

About MECLABS

MECLABS is a science lab that uses real-world research and training to help business leaders get better use out of sales and marketing technology and resources, including Internet marketing, website optimization, and lead management. We have been involved in direct research partnerships with companies throughout Europe and North America since 2001.

MECLABS deploys a rigorous methodology to conduct research. This research is compiled from:

- More than **10 years** of research partnership with our clients
- **1,300** experiments
- Over **1 billion** emails
- **10,000** landing pages tested
- **5 million** telephone calls
- **500,000** decision-maker conversations

MECLABS has consulted with companies like CISCO, Johnson & Johnson, The New York Times, 1-800-FLOWERS, and NetSuite to optimize sales and marketing processes and achieve triple-digit ROI gains.

Register for Summits and Workshops at MECLABS.com/training or contact Customer Service (available M-F, 9:00am-5:00pm ET)

service@marketingsherpa.com

1-877-895-1717 (outside the U.S. call 401-383-3131)
The Vocus Marketing Suite is the only tool you need to attract, engage and retain customers. It now includes Email campaigns and analytics, integrated with the best of Social, Search and Publicity. Powered by responsive technology, Vocus doesn’t just deliver results. We deliver marketing opportunities directly to you.