



2011 EMAIL ATTITUDES REPORT:

Email Relevance and the Proliferation of Mobile Email Use

In 2010, spending on mobile advertising in the U.K. increased 116%, reaching a total of £83 million¹. If this is any indication of the increased role of mobile messaging in the marketing mix, marketers are taking notice. 88% of UK marketers will use mobile marketing techniques in 2011². 75% of marketers plan to increase spend on mobile marketing initiatives – a 59% increase over 2010. Marketers are clearly starting to understand both the reach and consumer engagement possibilities that mobile marketing offers.

Consumers are telling marketers that their overall perception of email marketing relevance is improving. While this is welcome news for marketers, further insight into audience segment profiles, consumers' mobile use and device choices reveal that there is still room to improve on email's relevance in the consumer engagement process.

The opportunity for marketers is to capitalise on these insights by focusing on enhancing consumer engagement and crafting and delivering the correct marketing message, tailoring the message for audience segments and increasing the utility of that message.

1. ClickZ, "U.K. Mobile Ad Spend Accelerates," 22 March, 2011, <http://www.clickz.com/clickz/news/2035883/survey-uk-mobile-spend-accelerated-2010>

2. Mobile Marketer, "Mobile Marketing Spend to Increase 59% in 2011," 02 February, 2011 <http://www.mobilemarketer.com/cms/news/research/8955.html>

Key Data Points

- 36% of consumers say that email marketing has become more relevant in the last 12 months.
- 56% of smart-phone users say that email marketing has become more relevant in the last 12 months, compared with only 29% of feature-phone users sighting increased relevance.
- 34% of consumers now check email on their mobile device at least once a day; 21% of consumers say that they check email on their mobile device more than once a day.
- 66% of 18-24 year olds say they check email on mobile devices more than once a day.
- The top consumer mobile email messages preferred: special offers (27%), promotions/vouchers redeemable from mobile devices (21%) and real-time updates on tracking deliveries (21%).
- Only 20% of consumers say that reading emails on mobile devices is as easy as doing so on PCs.

Key Insights

- The higher the engagement consumers have with their mobile devices, the more relevant email marketing messages become.
- Younger audience segments proved consistently to be more likely to check emails on mobile devices.
- Smart-phone owners clearly showed much higher engagement with email marketing messages than feature-phone users.
- Mobile email marketing messages that focus on delivering value (pre-purchase) and providing a utility (post-purchase) are most relevant to consumers.
- Message usability issues decrease the propensity to engage with email marketing messages.

Recommendations

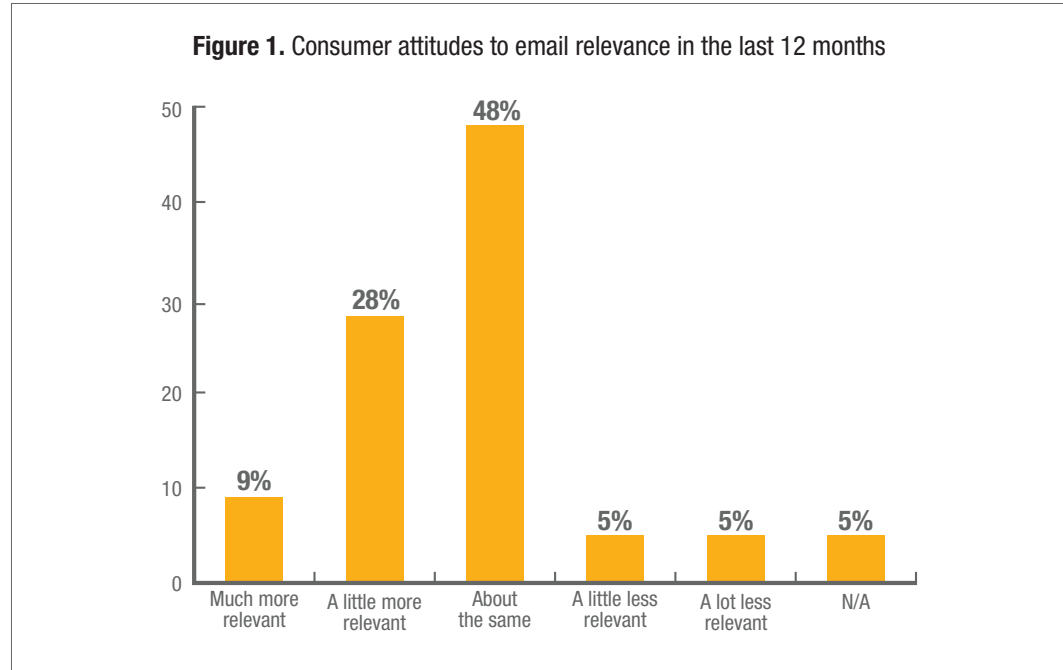
- Focus on relevance by crafting the right marketing message for the right audience segment, tailored to the individual's needs.
- Increase the propensity for increased, sustainable consumer engagement, by aligning consumer e-marketing preferences with the level of mobile usage and device ownership.
- Improve usability by developing custom templates to allow email creative to be rendered optimally across a range of mobile devices.

Research Methodology

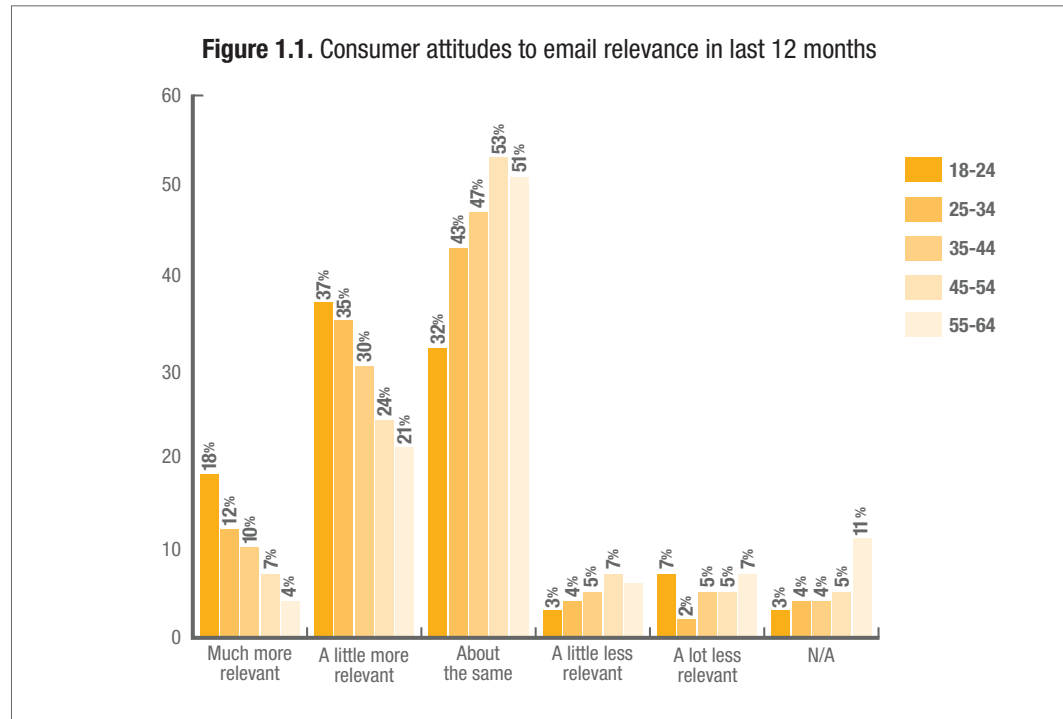
The following report is based on an independent poll of 1,002 UK adults conducted by Lightspeed Research and explores consumer behaviour and attitudes to various aspects of email marketing on mobile devices.

Consumer Attitudes to Email Relevance

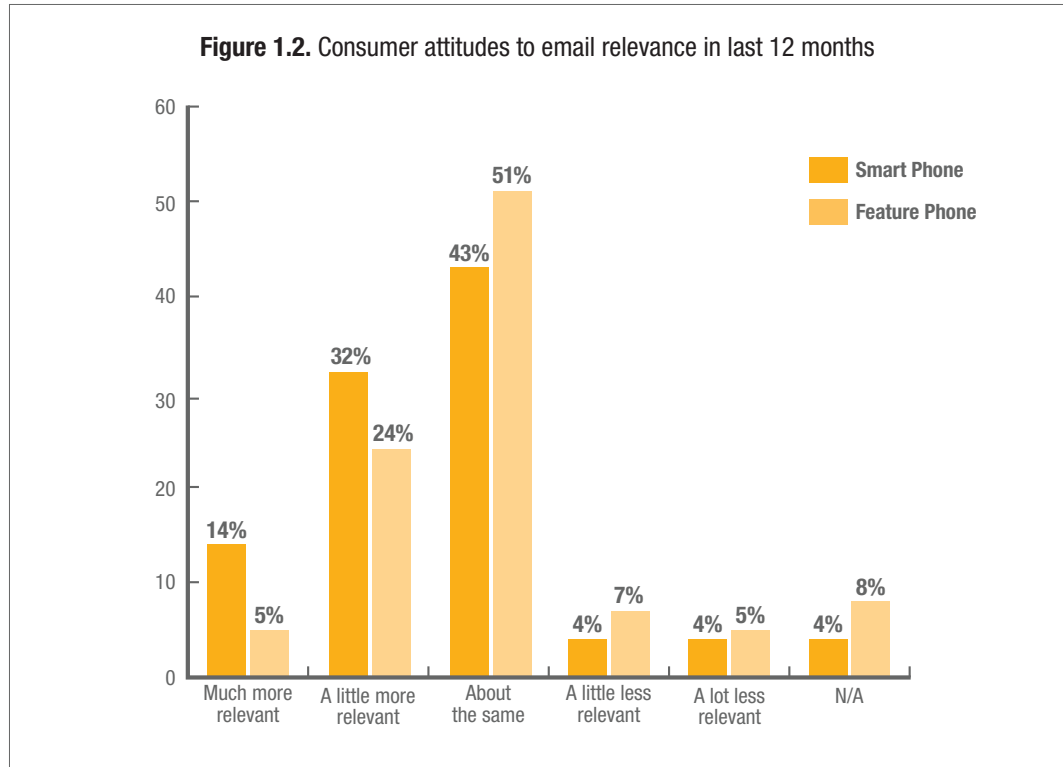
The research reveals that 36% of consumers claim that they marketing emails they have received in the last 12 months have noticeably become a little (27%) or much more (9%) relevant to them. 48% said that relevance levels have remained approximately the same while just one in ten (10%) said that they have become a little or a lot less relevant (5% each).



The data reveals that the age groups which have seen the most noticeable improvements in email relevance were 18-34 (54% - 18% and 37%) and 25-34 year olds (47% - 12% and 35%), pointing to a general trend: the younger the consumer, the more likely they are to have received noticeably more relevant marketing emails in the last 12 months.

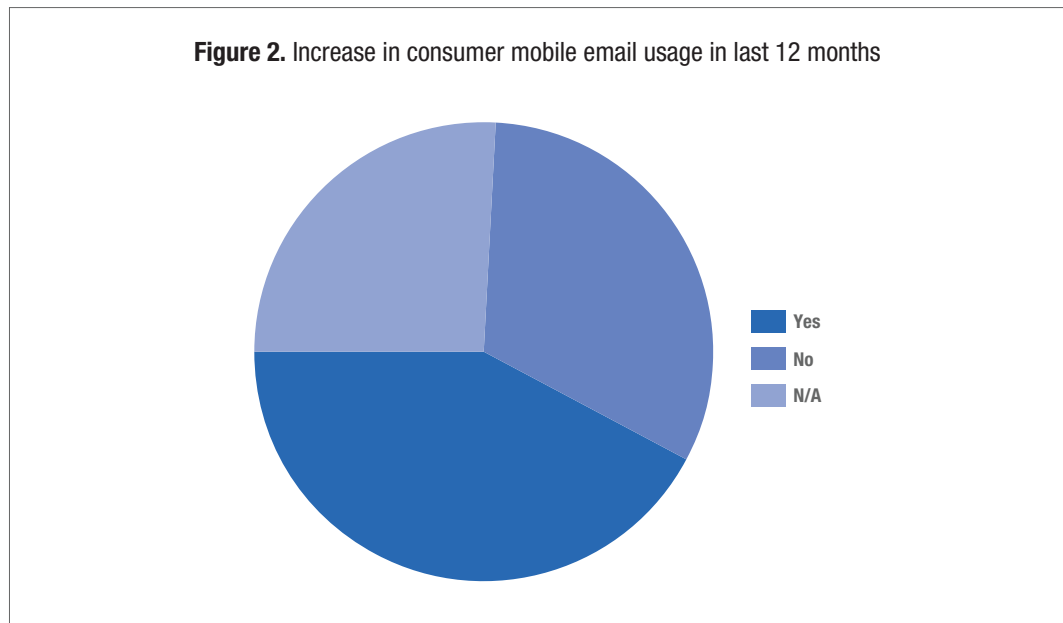


Interestingly, the percentage of smart-phone owners (42% of total respondents) who said that their emails had become more relevant in the 12 month period (46%) was significantly higher than feature-phone owners (29%).

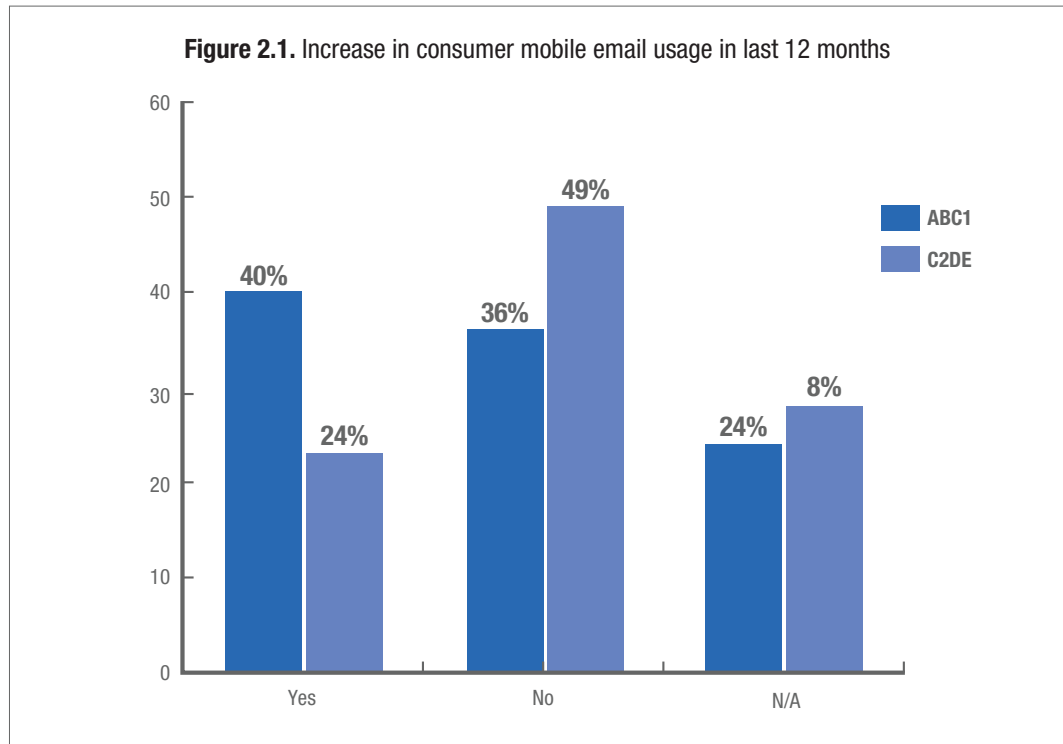


Increases in Mobile Email Usage

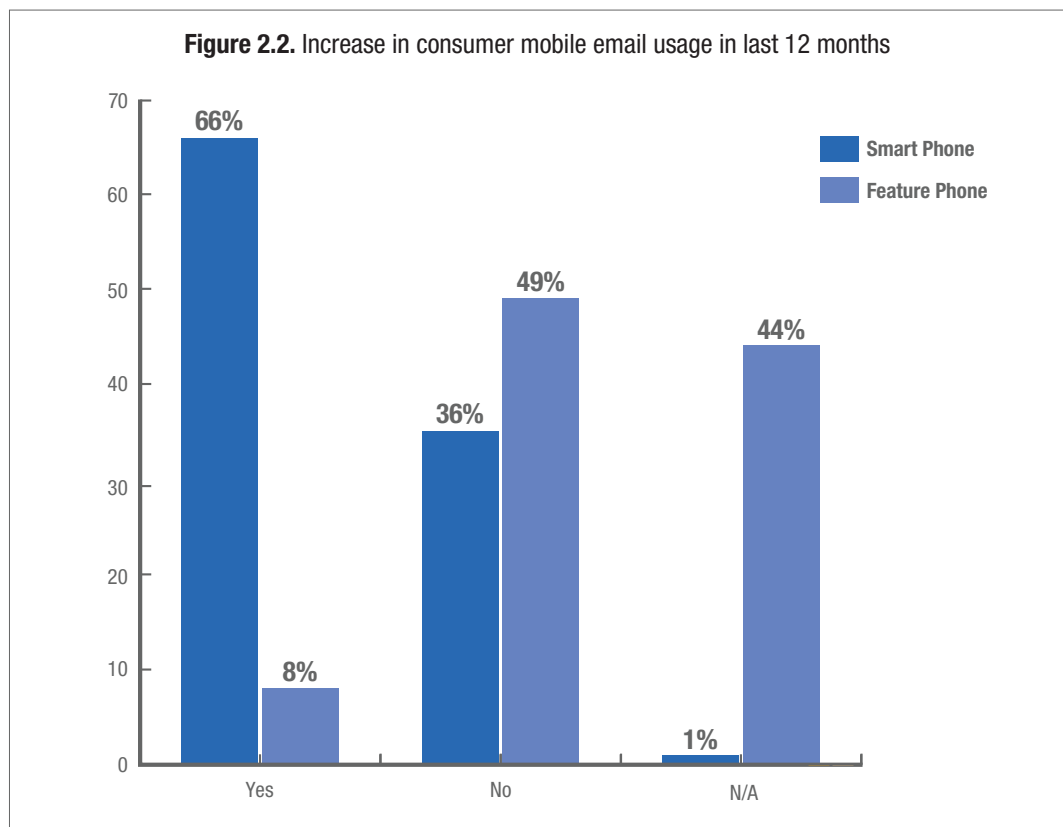
One in three (32%) consumers polled said that they had spent more time checking their emails on their mobile phone in the last 12 months. 42% said they had not while 26% said that they were unable to access emails via their mobile phone.



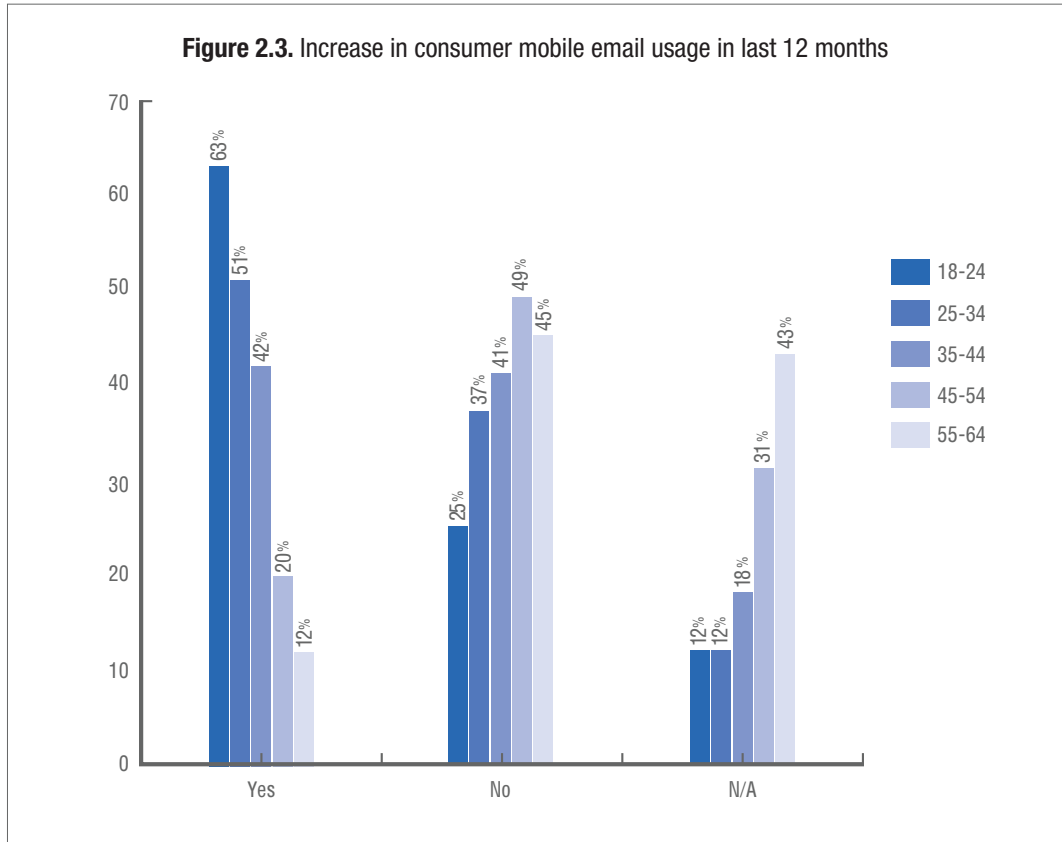
The data does reveal some significant differences between the attitudes of different social grades. 40% of ABC1s said they had increased mobile email use compared to 23% of C2DEs (49% of ABC1s were smart-phone owners compared to 36% of C2DEs).



The results also revealed that there was once again a marked difference between smart-phone owners and feature-phone owners in this regard. 66% of smart-phone owners said they had spent more time checking emails on their phones compared to just 8% of feature-phone owners.

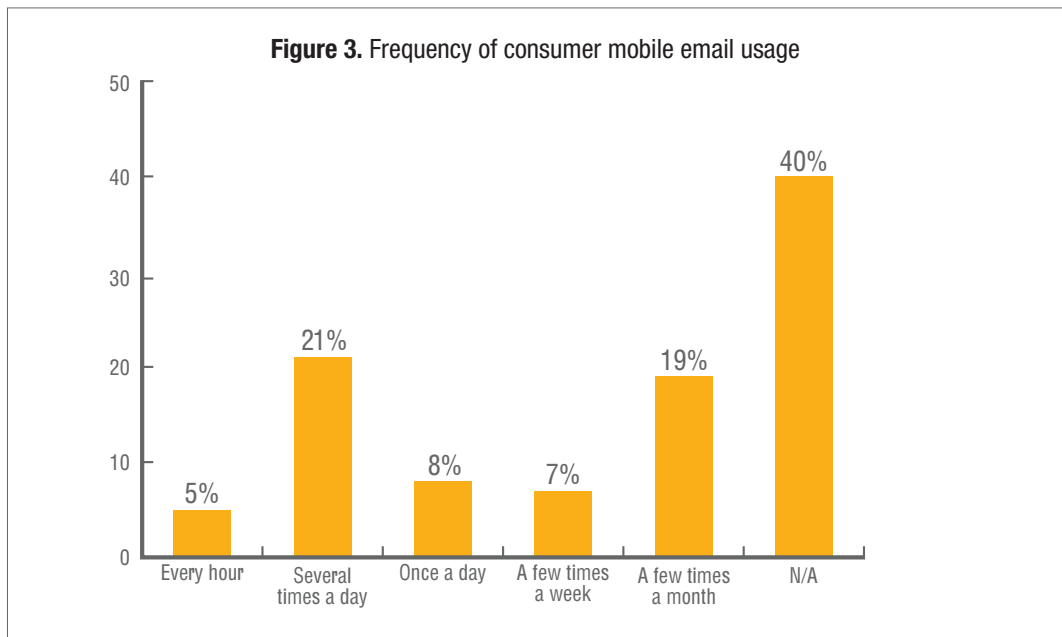


The age groups who exhibited the biggest increase in mobile email usage were 18-24 (63%), 25-34 (51%) and 35-44 year olds (41.5%), tallying the previously identified trend: the younger the user the more likely they are to be using their mobile for email and the more likely they are to have seen an increase in the relevance of marketing emails in the last 12 months.

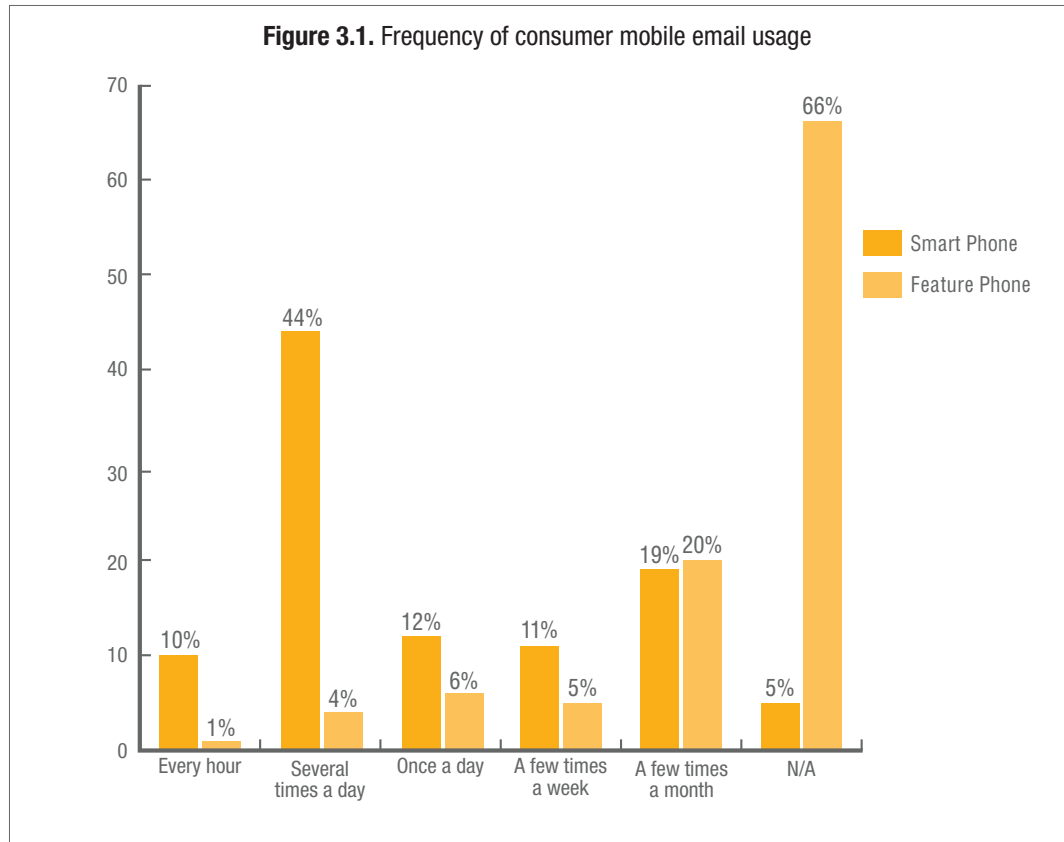


Mobile Email Frequency

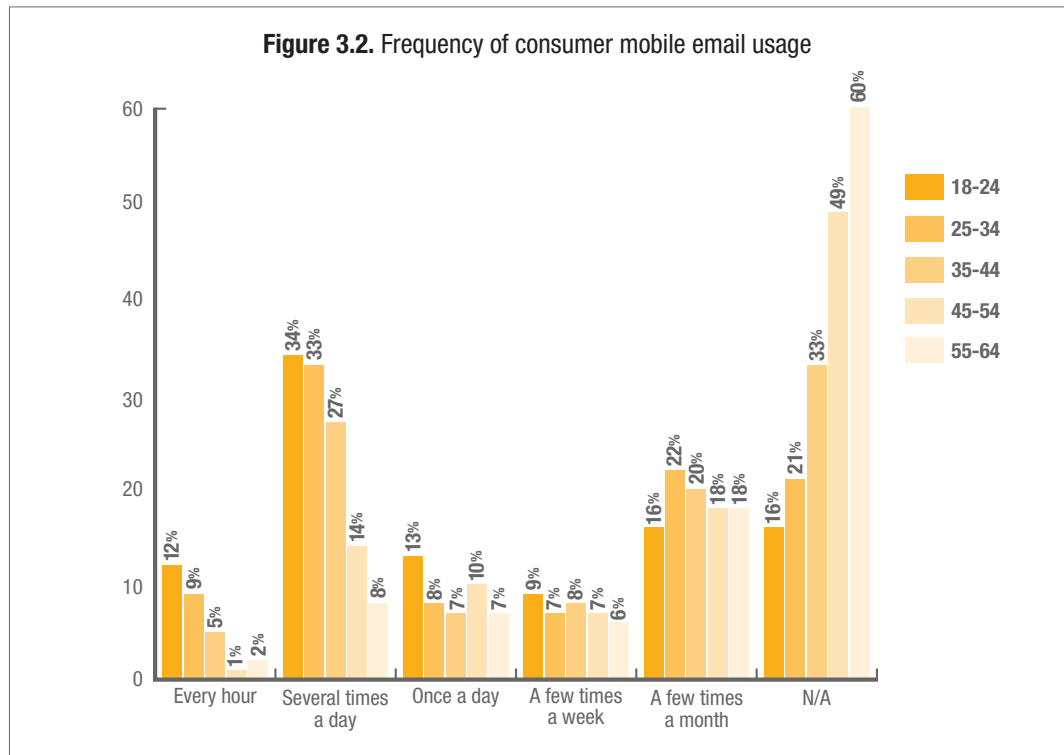
The research reveals that more than a third (34%) of consumers now access email on their mobile devices at least once a day, with 21% saying they do so several times a day and 5% checking every hour.



As might be expected, smart-phone owners were considerably more likely to check their emails regularly than feature-phone owners. More than half (54%) of smart-phone owners claimed to check email on their devices several times a day with 10% saying they check every hour.

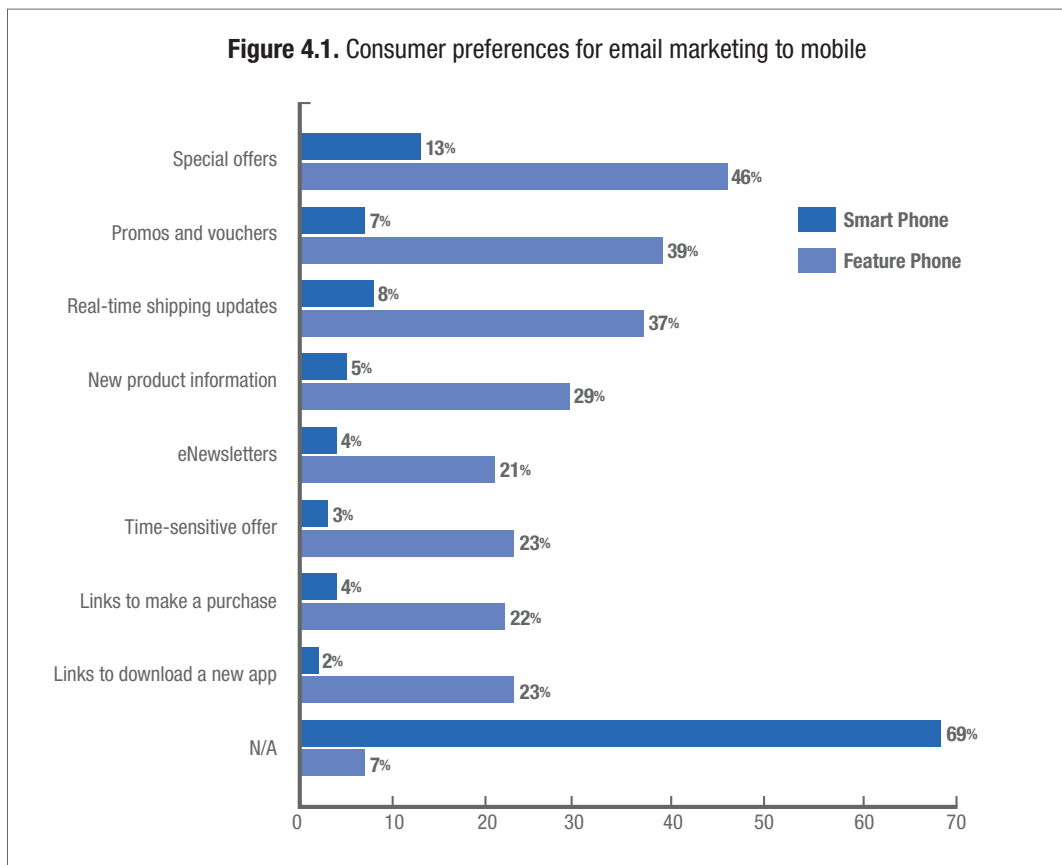
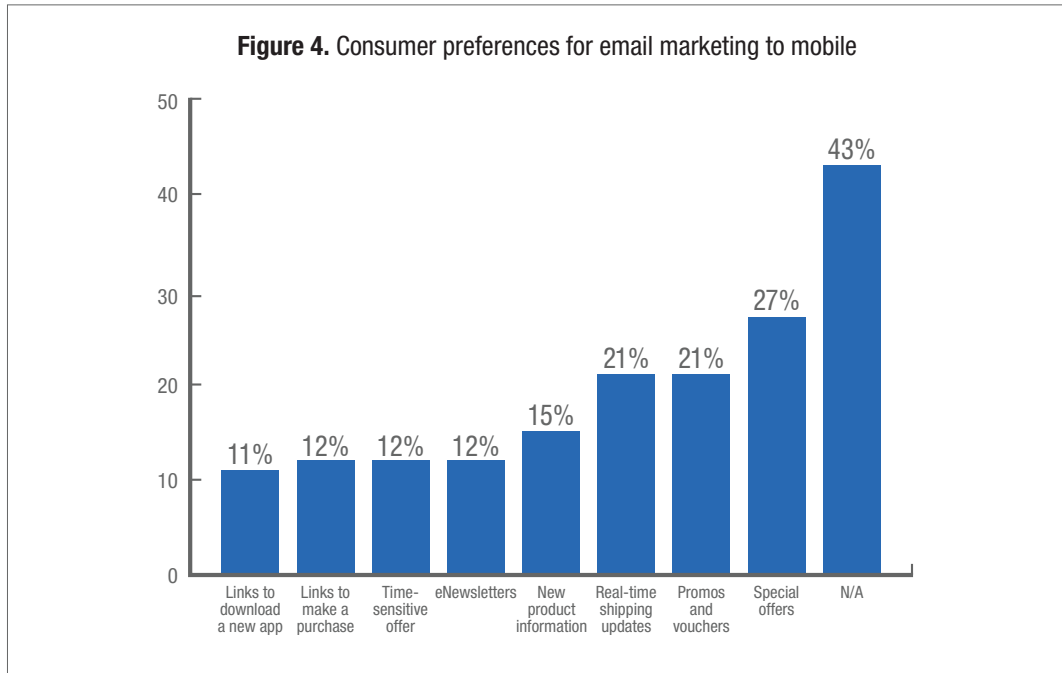


Again, younger consumers were consistently more likely to check emails on their mobile devices with 46% of 18-34 year olds and 42% of 25-34 year olds saying more than once a day.



Mobile Email Content Preferences

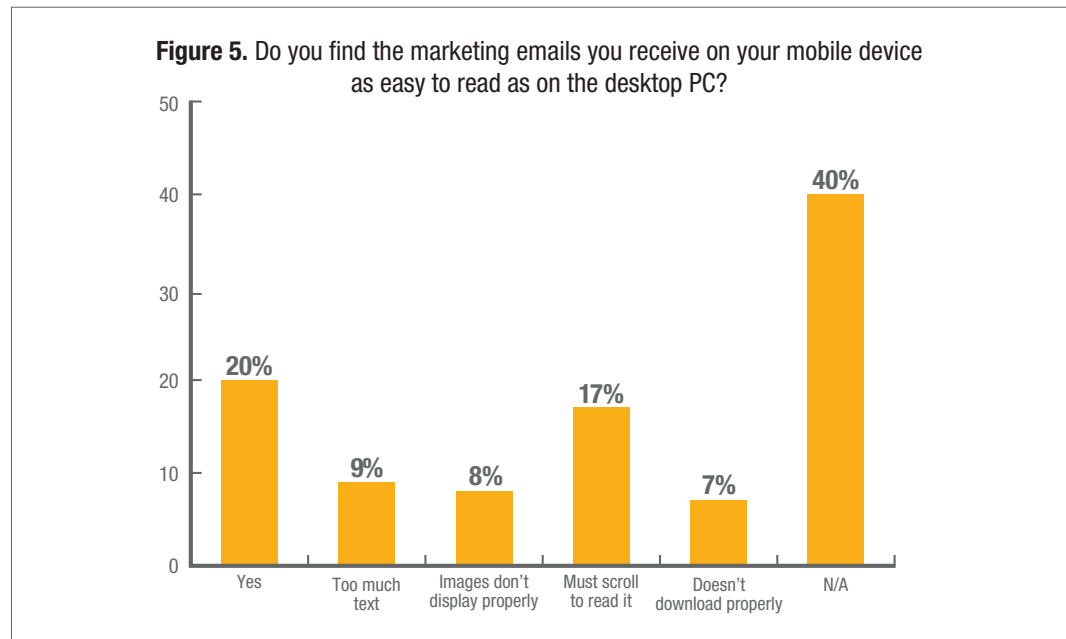
When asked what type of email marketing consumers preferred to receive on their mobile phones, the most popular formats were: news of special offers (27%) and mobile-specific promotions and vouchers (21%). However, beyond offers and promotions there was also notable demand for transactional and informational content. 21% said that they wanted to receive real-time updates on shipping/delivery times, 15% said emails containing new product information and 12% eNewsletters. Smart-phone owners also showed considerable demand for emails about new mobile applications.



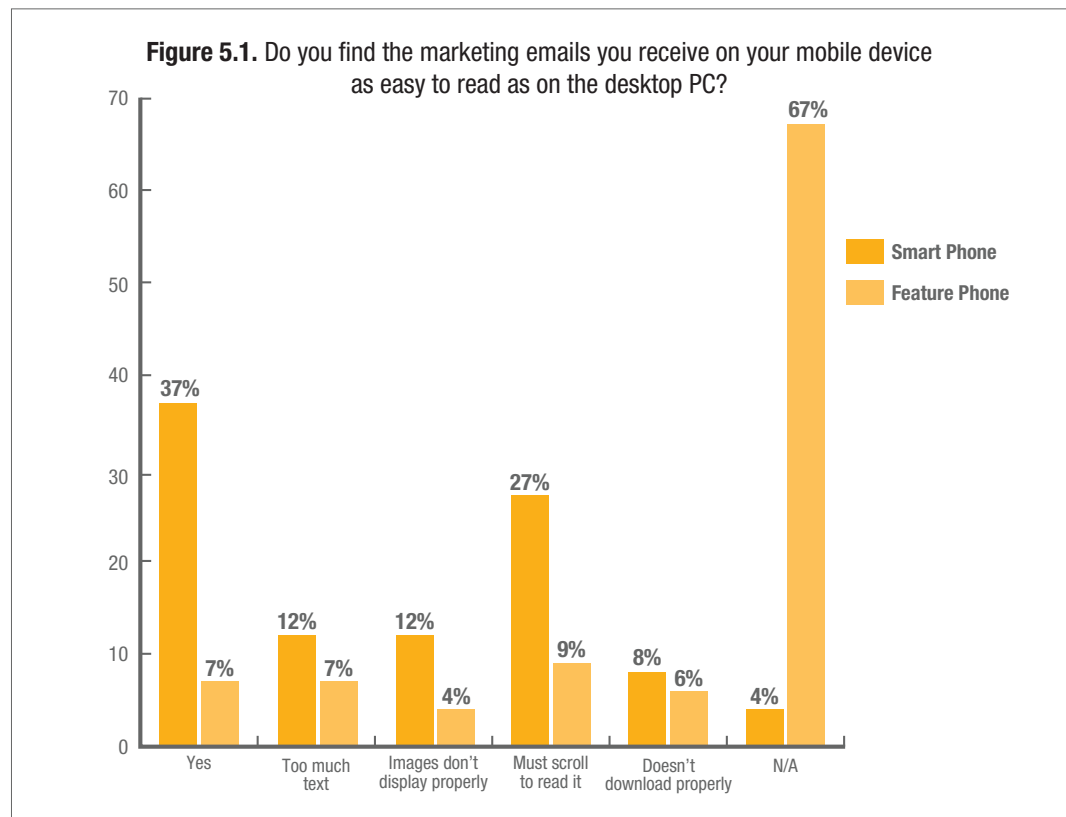
Mobile Email Usability

In spite of the demand for mobile-specific marketing emails, it is clear that usability remains an issue. Just two in ten (20%) consumers said that they found reading marketing emails on their mobile device to be as easy as reading them on their PC.

The most common complaints were: having to scroll across a page to read all the information (15%), too much textual content (9%), images not rendering properly (8%) and a failure for all the information to download (7%).



Although 37% smart-phone owners said that they did find emails as easy to read on mobile devices as PCs, as many as 63% said the opposite.



Research Methodology

This survey has been conducted using an online interview administered to members Light panel of UK individuals who have agreed to take part in surveys. All figures, unless otherwise stated, are from Lightspeed Research. Total sample size was 1,002 adults. Fieldwork was undertaken between 7th -11th March 2011. The survey was carried out online. The figures have been weighted and are representative of all GB adults.

Questionnaire

1. **Do you think that the emails you receive from brands you have asked to hear from have become more RELEVANT to you compared to 12 months ago? (i.e. after buying a book on Amazon, receiving an email recommending books which would be of specific interest to you)**
 - Much more relevant
 - A little more relevant
 - About the same
 - A little less relevant
 - A lot less relevant
 - Not applicable – I did not receive any marketing emails 12 months ago
2. **Thinking about the email addresses you have, including work emails, personal accounts (e.g. Hotmail, Yahoo, Gmail etc). In the last 12 months, would you say that you've spent more time using your mobile phone to check emails?**
 - Yes
 - No
 - I can't check my emails on my mobile phone
3. **How frequently do you check your email messages on your mobile phone? This includes all email accounts you can access via your mobile phone – work, personal, social networking accounts etc.**
 - Every hour
 - Several times a day
 - Once a day
 - A couple of times a week
 - A couple of times a month
 - I can't check my emails on my mobile phone
4. **What type of mobile specific email marketing do you prefer to receive on your phone? [please select all which apply]**
 - Emails containing promotions and vouchers which can be redeemed from your mobile device
 - Emails with links through to an app store to download a new application
 - Emails with links to a website which allow you to make a purchase online using your mobile
 - Emails with a time sensitive high-street offer just for me where I show a barcode from my device at the checkout
 - Emails to provide me with real-time updates of changes to shipping/delivery times
 - Emails with news of special offers
 - Emails containing new product information
 - E-newsletters
 - I can't check my emails on my mobile phone
5. **Do you find the emails you receive on your mobile device as easy to read there as on the desktop PC? (e.g. is the image displayed correctly, the text easy read, does the email fit the screen)**
 - Yes
 - No - there is too much text
 - No - Images don't display properly
 - No - I have to scroll across the page to read the information
 - No - Not all of the information downloads properly

About Lightspeed Research

Lightspeed Research (www.lightspeedresearch.com) is the market researcher's choice for digitally accessing and deriving insight from consumer opinions and behaviours whenever, wherever and in whatever segments needed. The industry's most thorough panellist pre-screening process and large global pool delivers business-ready results quickly and cost-effectively. From proprietary online access panels to specialty panels, custom panels and innovative mobile surveys, Lightspeed Research offers the industry's highest-quality and most complete combination of qualitative and quantitative online research. This is backed by an expert client operations team that provides a range of data.

About e-Dialog

With more than 10 years of multichannel marketing experience and many experts on our staff, e-Dialog has been providing software-as-a-service and strategic services to world-class marketers in retail, entertainment, travel, media, business-to-business, and more. We understand what it takes for our clients to be successful, which is why e-Dialog is one of the only marketing service providers consistently recognized by top analyst firms for both outstanding service and first-class technology. e-Dialog is a wholly owned subsidiary of GSI Commerce, Inc., an eBay company.



Relevance Enabled Technologies

As experts in relevant marketing, e-Dialog provides clients with advanced technology and best practices that deliver the highest degree of relevance in multichannel campaigns and programs.

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