

Email Marketing

Benchmark Guide 2008

272 Charts & Tables
+ 9 Heatmaps

Note: This is an authorized excerpt from the full 328-page Email Marketing Benchmark Guide. To download the entire Guide, go to: <http://www.SherpaStore.com> or call 877-895-1717

Editor's Letter

We speak with marketers using email every day and have yet to find someone who is 100% satisfied with their current programs and campaigns. All admit that they could do better.

Maybe they've been putting off a template redesign. Maybe they need to do a few more A/B tests. Maybe they simply need to raise their heads above the daily grind and seek some inspiration. Maybe a new reader survey might help them create more pertinent newsletter issues. Everyone has something they'll admit they could do better.

That's why we publish this annual Benchmark Guide ... to help the working marketer do better by providing useful data for budgeting, forecasting, results comparisons and tactical decisions.

If you're willing – and able – to do a better job than average, your results will show for it. It's not impossible for your email campaigns to stand out in those crowded in-boxes. Strong writing skills, better graphic design, an obsession with permission email and a willingness to test regularly will result in higher response rates. Yes, even if your budget is tiny compared to your competitors.

Remember, email success is still more about marketing brains than technology. Great technology can help – especially for segmented and auto-triggered campaigns, but your own skills and passions are what really counts.

This Guide is a result of years of research and email tests by thousands of professionals. In it, you'll find:

- 260 charts, 12 images and nine heatmaps filled with real-life data as reported by 1,210 marketers in our official annual Email Benchmark Survey, conducted in October and November 2007.
- More real-life data as reported by thousands more marketers in other MarketingSherpa studies of various niches, including mobile, advanced B-to-B and affiliate marketing.

- Commissioned private studies conducted by MarketingSherpa in conjunction with top email service providers, including Eyetools and KnowledgeStorm, with real-life aggregate data across hundreds of clients.
- ‘Best of’ data from published third-party studies and other researchers, such as EmailLabs, ReturnPath, Quris and Worldata.

Plus, this year’s Guide features several Special Reports, including:

- A look at the impact of segmentation
- Eyetracking results of how to optimize ad positions in email newsletters
- How false positives are affecting your email
- How emailers are managing email: what they like (and don’t like) about their email management systems
- Plus, all the stats on delivery, open, clickthrough and conversion rates

If your results don’t match the averages reported in this Guide, don’t despair. Sometimes, given the offer, the frequency and the list, a 10% open rate may be great. Sometimes, 50% may be lousy.

If you aren’t achieving what you think you should be getting, we recommend that you immediately put your email program through an audit. Delve into lifetime value per name, average name lifetime, creative test results, database practices, etc. You may find that you’re doing better than you thought.

Finally, contact us if you have a question about anything in this Guide or if you have ideas for data that you would like us to research for next year’s edition. Email us at Feedback@MarketingSherpa.com, and, yes, live human beings reply to that email address every business day.

The best of luck in your email marketing in 2008!



Tad Clarke
Editorial Director, MarketingSherpa Inc.

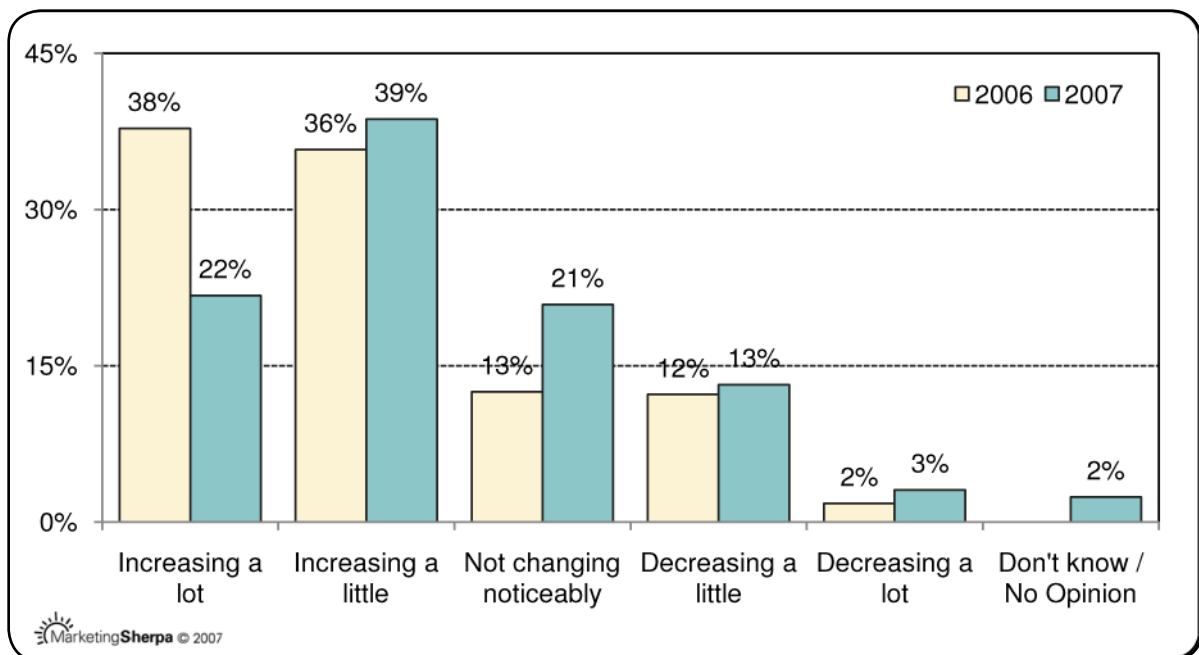
Executive Summary

2008 Key Email Marketing Alerts for 2008

Before you dive into the 260 charts and tables, 12 images and nine new eyetracking heatmaps included in MarketingSherpa's Email Marketing Benchmark Guide 2008, here is a quick overview of some the key studies and findings contained in the book.

Alert #1. Emailers Are Still Enthusiastic, But ...

Chart 1: Impact of Email Marketing, 2006 vs. 2007



Source: MarketingSherpa, Email Marketing Benchmark Survey, November 2007

Methodology: This fifth annual survey was opened to selected MarketingSherpa reader lists on Oct. 23, 2007, and closed on Nov. 2, 2007. 1,210 total responses were collected from in-house email marketers and employees at agencies/ESPs working with email. Any respondents not directly involved with email marketing were screened.

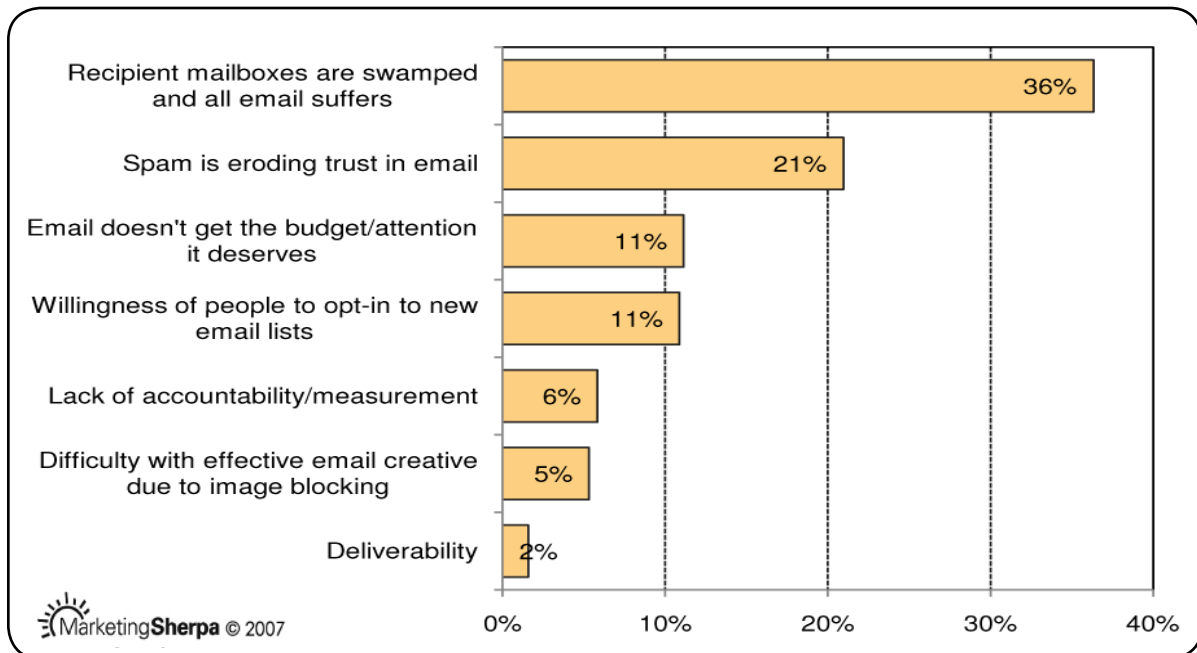
In each of the last five years, we've asked the email marketing industry high-level opinion questions designed to take its temperature. Generally speaking, marketers are bullish about email. But this year we saw a real drop in those who are seeing email's effectiveness 'increasing a lot' and a bump in those who say it's 'not changing noticeably.' Optimism in 2007 was more guarded than in previous years.

Why? Inbox overload. That's the No. 1 concern on the minds of marketers — dwarfing factors like delivery and tracking. There's also a general impression that email is getting left behind in the media mix — that it can't maintain its dominance in digital communication in the face of so many competitors for user attention and marketing dollars.

Those who see email as static or getting worse are 50% more concerned about inbox overload — while concerns on the part of those who are more positive are spread around among spam, image blocking, tracking and budgets. Those who are positive are far more likely to see their organization's ability to track and measure email's impact in a positive light — 70% say this capability is improving compared to only 38% of those who are bearish. Those who are negative also are twice as likely to say that their deliverability is getting worse.

Alert #2. Competition Is Healthy ... Isn't It?

Chart 2: Biggest Challenges Facing Email Marketing



Source: MarketingSherpa, Email Marketing Benchmark Survey, November 2007

Methodology: This fifth annual survey was opened to selected MarketingSherpa reader lists on Oct. 23, 2007, and closed on Nov. 2, 2007. 1,210 total responses were collected from in-house email marketers and employees at agencies/ESPs working with email. Any respondents not directly involved with email marketing were screened.

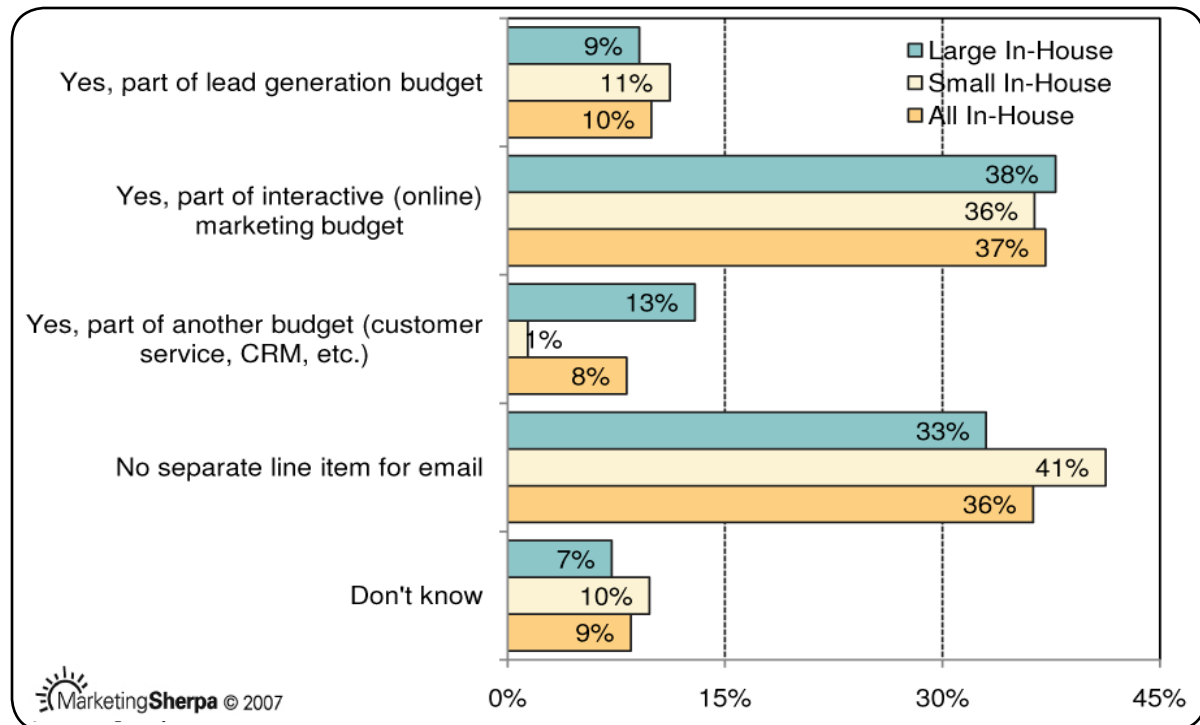
Despite all the noise about deliverability of email, a mere 2% of email marketers rated it as the biggest challenge facing them. Overwhelmingly, the intertwined issues of too-full email inboxes and a lack of trust among

email recipients due to spam are the issues keeping email marketers up at night. The obvious take-away for email marketers faced with this scenario is that your subject line is probably the most important part of your email and deserves quite a bit of attention.

The not-so-obvious take-away is that increasing trust is central to increasing open and conversion rates. Increasing trust is a little bit art and a whole lot of science, but it starts with listening to your customers. Consumer research in this year's Benchmark Guide points repeatedly to the benefits of gaining trust and the dangers of losing it.

Alert #3. More Than One-Third of Organizations Lack an Email Line Item

Chart 3: Where Does the Email Budget Live?



Source: MarketingSherpa, Email Marketing Benchmark Survey, November 2007

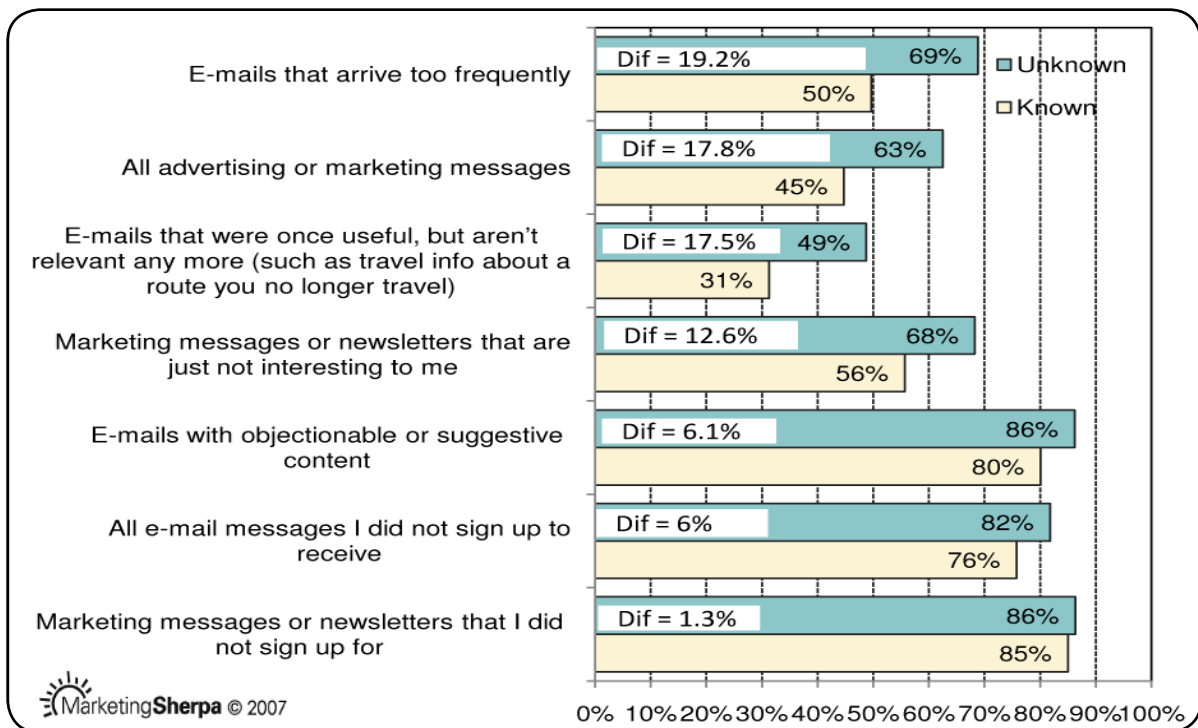
Methodology: This fifth annual survey was opened to selected MarketingSherpa reader lists on Oct. 23, 2007, and closed on Nov. 2, 2007. 1,210 total responses were collected from in-house email marketers and employees at agencies/ESPs working with email. Any respondents not directly involved with email marketing were screened.

Email is the most used of the online marketing tactics and routinely garners the highest return on investment. It's remarkably important and, yet, more than one-third of in-house emailers don't have a separate line item for email marketing.

Those with no separate line item aren't necessarily the small companies you might suspect. Almost 68% are organizations with more than 100 employees, and 23% are organizations with more than 2,000 employees. Those with defined budgets in online marketing or lead generation are 30% more likely to say that their ability to measure and prove the impact of email marketing is improving. They're also much more likely to say the impact of email marketing is increasing.

Alert #4. Spam Is in the Eye of the Beholder – Your Customer

Chart 4: What Consumers Consider to Be Spam, Known vs. Unknown Senders



Source: MarketingSherpa and Q Interactive, September - November 2007

Methodology: 3,063 responses were collected from consumers who had recently reported spam (complainers), 1,118 responses were collected from a random sample of consumers (control).

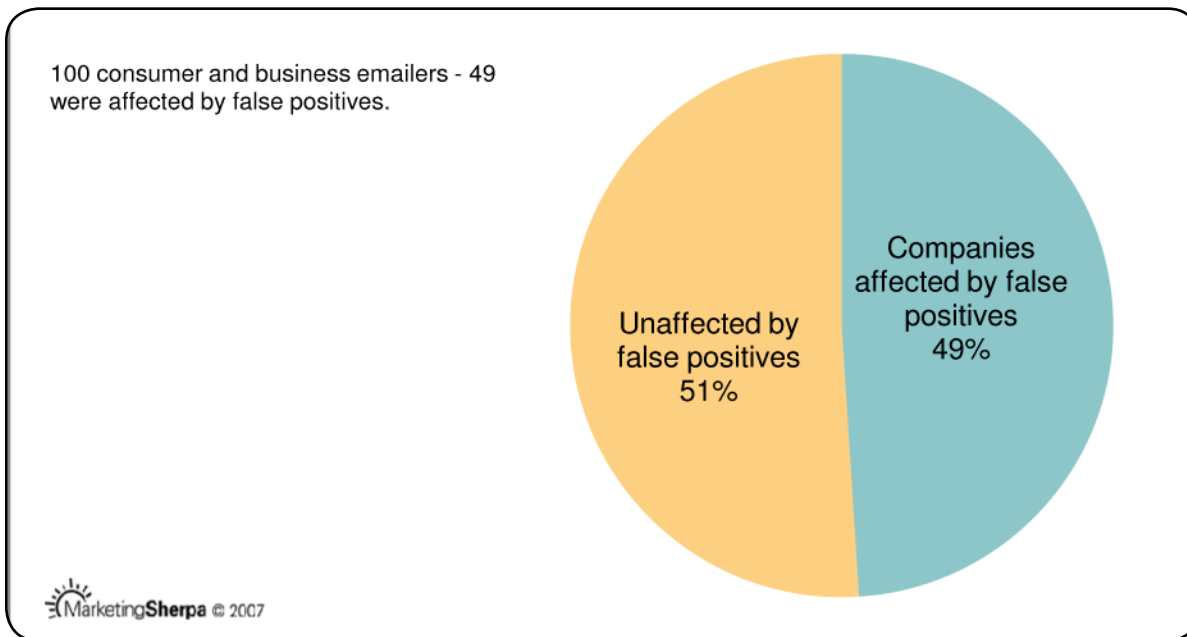
One of the special reports we conducted this year was a survey of more than 3,000 consumers who had recently hit the 'spam' button in their free email clients. This group was compared to free email users as a whole.

The previous chart shows what makes consumers report an email as spam and has been sorted by the difference, or delta, between known vs. unknown senders. You can clearly see that consumers judge companies they are familiar with less harshly than those that are new to them. That said, even

among emailers they know or have found useful in the past, if the emailer crosses a certain line, they become a spammer in the eyes of their customers.

Alert #5. Good Reputation Scores No Cure-All for False Positives

Chart 5: Percentage of Companies Affected by False Positives



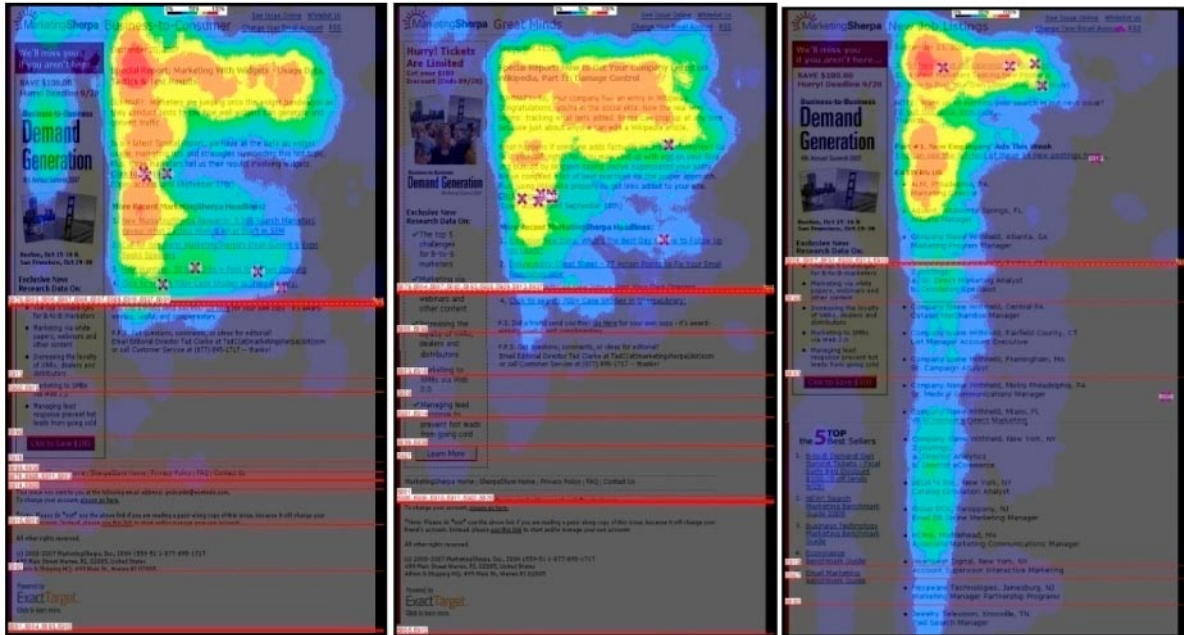
Source: MarketingSherpa and Pivotal Veracity, *Emailer Practice and False Positive Study*, November 2007
 Methodology: The emails of 100 top publishers, retailers and business-to-business companies were monitored for 90 days via seeds accounts established with Yahoo!, AOL and Hotmail/WindowsLive.

In this updated study of how false positives (emails mistakenly identified as spam by ISPs and free email clients) affect top emailers, we were disappointed to see that there hasn't been any improvement since the original study back in 2005. We were expecting that the move toward reputation-based filtering would have a positive affect for top emailers with stellar reputations. Unfortunately, that wasn't the case.

Positive reputation scores weren't necessarily a ticket to delivery, nor was the use of one or more authentication protocols. ISPs, it seems, continue to use distinct and unique formulae to determine delivery. Reputation is vital, but 'unique' in the eye of the service provider, and content continues to play a role in filtering.

Alert #6. Ads Get Stale Fast, but Don't Have to Stay That Way

Heatmaps: Declining Attention After Repeat Views of Similar Ads



Source: MarketingSherpa and Eyetools, Email Eyetracking, Year Three, November 2007

In this year's round of email eyetracking tests, we wanted to explore how people view ads in newsletters and the different elements that could positively (and negatively) affect their attention. We led test groups through several rounds of newsletter changes, each time trying to introduce variations to test their effect on how people view and move through the page.

One of the most telling visual findings is illustrated above — in the heatmaps from the first round of testing. In these unmodified emails, attention on the top left ads dropped steadily each time the audience viewed them. By the third viewing, attention had dropped to almost zero. We're all aware of 'banner blindness' but it's telling that this occurred so quickly, and to ads that were highly relevant to the context of the surrounding content.

Fortunately, there are methods to positively change attention, and we explored a number of them. The bottom line is to change things up. Ad rotation isn't necessarily enough — if ads are in the same location and are the same size, blindness occurs quickly. In several subsequent tests, we found that changing ad position and format can jumpstart attention.

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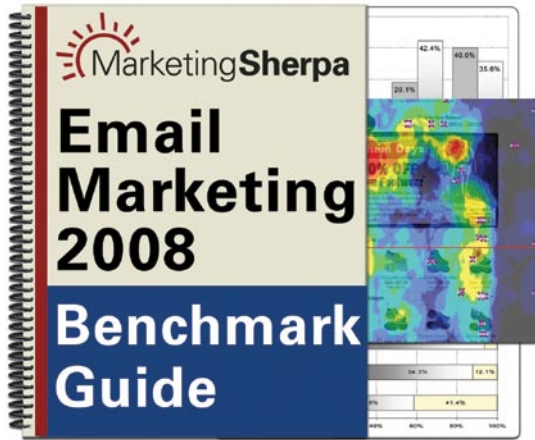
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