

DUTCH EMAIL BENCHMARK 2016

The 2016 Edition

DDMA

Dutch National Email Benchmark 2016

In the face of a fast changing and uncertain environment email marketing is for many companies strategically important. In this report the Data Driven Marketing Association (DDMA) presents the Dutch annual email benchmark of 2016. This benchmark aims to provide insight into the effectiveness of campaigns and which drivers (e.g. time of day or a specific technique) make a campaign more effective. This year's benchmark includes 172k campaigns and 4.4 billions emails, provided by 7 Email Service Providers (ESP's), which represents a substantial part of the total amount of campaigns that are sent in the Dutch market.

This year we introduce a new impact analysis through which we can address the impact of specific campaign characteristics on the Confirmed Open Rate (COR), Click Through Rate (CTR) and Click To Open Rate (CTO).

Some of the main findings this benchmark has uncovered

Overall ratios. The COR and CTR have remained steady when compared to last year. Both the COR and CTR show a -0,3% change; from 35,5% last year to 35,2% this year for the COR and from 7,3% last year to 7,0% this year for the CTR. The CTO shows a -1,1% change; from 18,6% last year to 17,5% this year. The CTO has shown a substantial decrease in the last couple of years from 22,1% in the 2012 benchmark to 17,5% this year.

Campaign size. There is a negative relationship between the campaign size and the COR, CTR and CTO. The larger size buckets have a lower COR, CTR and CTO compared to the average. We expect that smaller campaign sizes are better targeted to their audience and thus more relevant for the reader.

Campaign frequency. The campaign frequency shows a clear trend; the more campaigns sent by a company per year, the lower the COR, CTR and CTO. Although, lower ratios indicates that relatively less emails are opened and clicked upon when looking at a single campaign, this does not mean that the less emails are opened in absolute numbers.

Timing. Of all campaigns, 75% is sent during office hours. This varies across industries. Some industries (Retail eCommerce only, Leisure, Travel) prefer evenings and weekend hours more than others. These industries are related to leisure activities.

Techniques. From the techniques that are used in campaigns, both dynamic content and a personalised subject line significantly improve the COR, CTR and CTO. This is especially evident in industries like Charity and Telecom, which make good use of these techniques.

Mobile usage. Of all campaigns, 41% is opened on a mobile device and 59% on a desktop. This is a +10% change compared to last year's benchmark (31%). During the weekend half of the campaigns are opened on a mobile device. The percentage of clicks on a mobile device is 34%, which is slightly higher compared to last year (31%).

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The DDMA Email Research and the Email ESP's Commission



PwC



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Partners

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Dear reader,

The numbers tell the tale. When done well, email stands out as one of the most effective ways to reach target audiences. Marketers are always looking for statistics that express customer engagement towards their brand, marketing- or media channel. The DDMA Email Benchmark 2016 provides statistics for measuring engagement for open, click through and delivery rates, ideally within their sector of industry.

This year the benchmark is released in collaboration with PwC. This has resulted in a more extensive and in depth analyses of the data. For the first time we do not only describe the ratios and technique's used throughout the various campaigns and sectors of industry. We also use regression analyses to predict specific campaign metrics.

The response ratios remain more or less unchanged when compared to previous editions. However the regression analyses shows that variables like dynamic content, time sent or personalised subject lines can significantly influence the ratios. So a smart email marketer can immediately use the results in his own business strategies.

I would like to thank everybody who contributed to this year's benchmark. Foremost the participating Email Service Providers and their clients. I'm also grateful for the continuous input and feedback on the report from the DDMA Commissions Email Research and ESP's. Last but not least many thanks to the PwC team for their excellent work. Our joint efforts have led to a great result.

Diana Janssen
Director
DDMA

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In this report the DDMA presents the Dutch email benchmark of 2016. The report can be used to measure the effectiveness of individual campaigns. The data includes campaigns that are sent between January 2015 and December 2015, which is a substantial part of the total amount of campaigns sent in the Dutch market. More detailed comparisons can be made with the online tool on the DDMA-website: www.nationaleemailbenchmark.nl.

The first part of this report provides the traditional benchmark average ratios (COR, CTR and CTO) for all campaigns. The second part consists of more detailed overview for specific campaign attributes (size and frequency, timing, techniques and mobile usage). Thirdly, deep dives per industry are given in the respective detailed industry pages. To navigate through the rapport, the menus on both sides of the pages and/or the table of contents on the previous page can be used.

This year's changes

The report contains the standard ratios that have been used in the previous years (CTR, COR and CTO). However, we make use of two methods to calculate these ratios. Both methods serve a different purpose and are thoroughly explained in the appendix.

1. **Descriptive method:** What happened? (e.g. 4% of all campaigns used a personalised subject line)
2. **Predictive method** : What might happen next? (e.g. the use of a personalised subject line increases the COR with 1,8%)

For the second part of this report each of the attributes has a descriptive (description) page and a predictive (impact) page. For the third part of this report this is similar, each of the industries has a descriptive and predictive page.

A reading guide and list of definitions can be found in the appendix and can directly be accessed by [clicking on the reading guide](#).







BENCHMARK 2016




OVERALL RATIOS

This section contains the ratios for this year's benchmark. We provide an overall description of the ratios and of the impact of the B2B and B2C segmentation on the ratios.

The COR and CTR remain steady at the high levels of last year, the COR still shows a negative trend

	 COR	 CTR	 CTO
Total	35,2%	7,0%	17,5%
B2C	34,8%	6,8%	16,9%
B2B	36,3%	7,4%	18,9%
	 AR	 SBR	 HBR
Total	99,1%	0,4%	0,6%
B2C	99,2%	0,3%	0,5%
B2B	98,7%	0,6%	0,7%

 The average COR of all campaigns is 35,2%, this is slightly lower compared to last year (35,5%). Last year the COR increased after several years of a decreasing COR.

The average CTR of all campaigns is 7,0% which is comparable to the previous two benchmarks (7,3% and 7,3% respectively). The CTO is 17,5% which is slightly lower compared to last year's benchmark (18,6%). Over the last couple of years the CTO has shown a negative trend, declining from 22,1% in 2012 to 17,5% in this year's benchmark. For B2C and B2B campaigns there is a small variation in these ratios, with B2B having higher percentages than B2C campaigns. Again, it is important to note that it is hard to determine what factors have most influence on the fluctuation of these ratios.

The AR shows that 99,1% of emails is accepted which is higher compared to last year (98,9%). Both HBR (0,6%) and SBR (0,4%) dropped in comparison to last year (respectively 0,7%, 0,5%). Hence, the overall quality of delivery can be regarded as improved.

CAMPAIGN CHARACTERISTICS

This section contains the description of campaign characteristics and their impact on the ratios. We will touch upon campaign size and frequency, timing and techniques. For most of these characteristics two pages are included; the first page includes descriptive information and the second page the impact of each characteristic on the ratios.

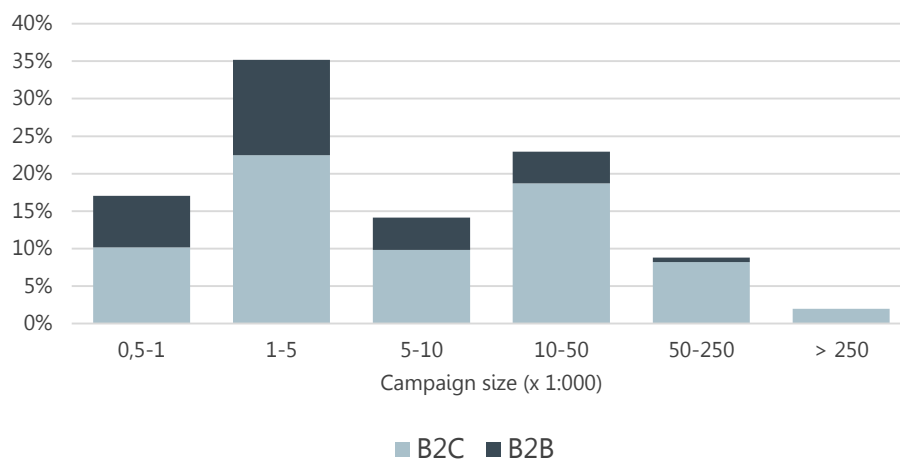
Smaller campaign sizes are more often applied, lower campaign frequency is favoured



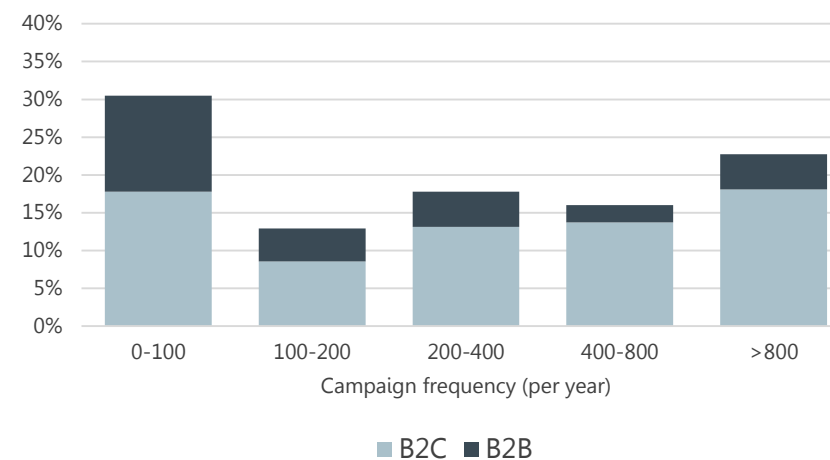
The graphs illustrate the campaign size and campaign frequency distribution across size buckets. The campaign size buckets are similar compared to last year. This year the concept of campaign frequency is newly introduced. The campaign frequency is simply the total amount of campaigns divided by the number of companies that send these campaigns. This gives an indication of how many campaigns customers receive.

It seems that smaller campaign sizes are more prevalent, with a peak in the size bucket 1-5. The distribution of campaign size buckets between B2B and B2C fluctuates. In B2B campaigns there is a preference for a smaller campaign size. Similarly, a smaller campaign frequency is favoured when sending B2B campaigns, whereas B2C is more evenly distributed across size buckets.

Campaign size



Campaign frequency (average per company)



Description

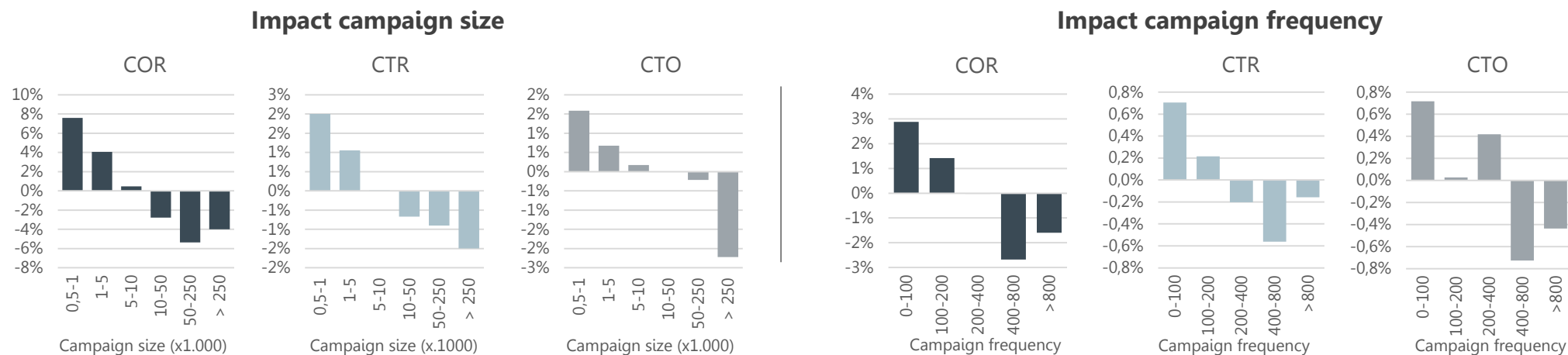
Impact

A large campaign size and a high frequency have a negative impact on the COR, CTR and CTO



The **campaign size** has the largest impact on the ratios of all campaign variables measured in this report. The graphs below show each of the ratios, per campaign size bucket in relation to the average ratios. For each of the ratios the smallest size bucket provides the best ratios. The larger a campaign gets, the more negative the trend. The COR shows a deviation from this trend for its largest size bucket, which we cannot explain.

For the **campaign frequency** there is a similar downward trend. This indicates that when a company is sending more campaigns this has a negative impact on the COR, CTR and CTO.



Note: The percentages shown in these graphs, illustrate the deviation (subtract/add) from the average ratio.

Of all campaigns, 75% is sent during office hours (Monday-Friday, 08:00-18:00)



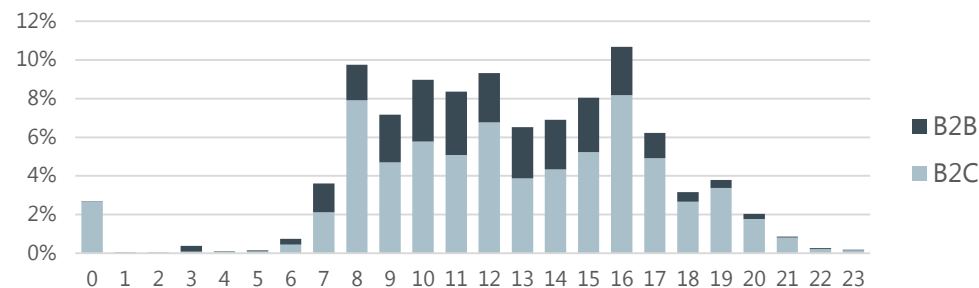
The graphs on the right show the distribution of sent campaigns by hour, day and month.

Most campaigns are sent between 08:00 and 18:00 (87%). In the evening, 10% of the mails are sent and at night (22:00 to 06:00) the remaining 3% is sent.

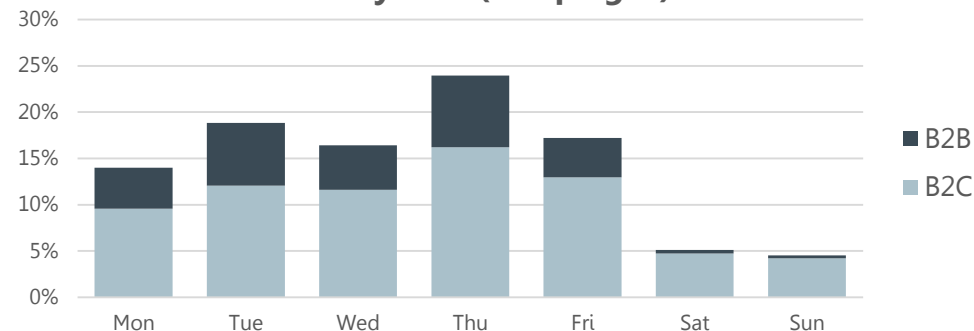
The largest part of campaigns is sent during working days (90% of all campaigns). For B2B campaigns this is 98%, which implies that there is hardly any activity during the weekends. B2C does show activity during the weekends, although this is significantly lower than during the week. Thursday is by far the most popular day for B2C and B2B campaigns with a total 24% of all campaigns that are sent.

The months show less variation than the hour or day. But we do notice that during the summer holiday months, July and August, less emails are sent. Similarly, May is less active as well, which is most probably related to the four national holidays and one or two weeks of school holidays. September to December is the most active period, which is probably a result of the Year-End campaigns. Accordingly, we see a small drop in activity around January as a follow up for this period.

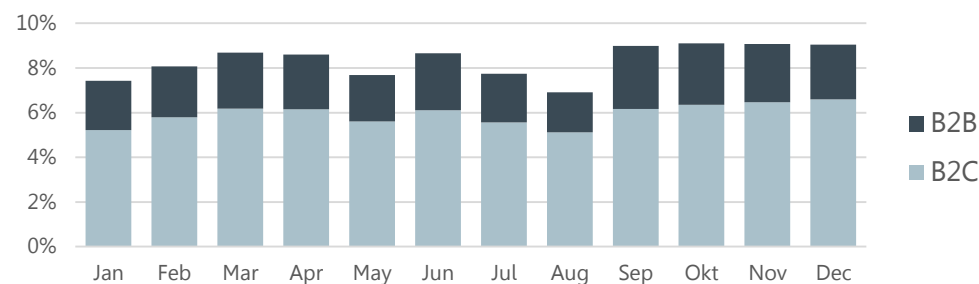
Hour sent (campaigns)



Day sent (campaigns)



Month sent (campaigns)



Total emailing volume has a negative impact on COR and CTR

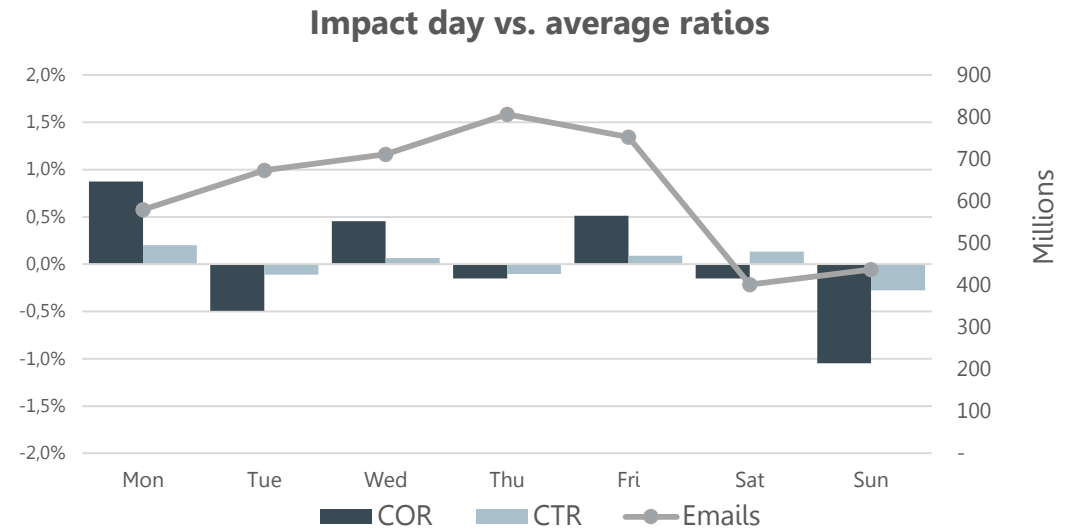
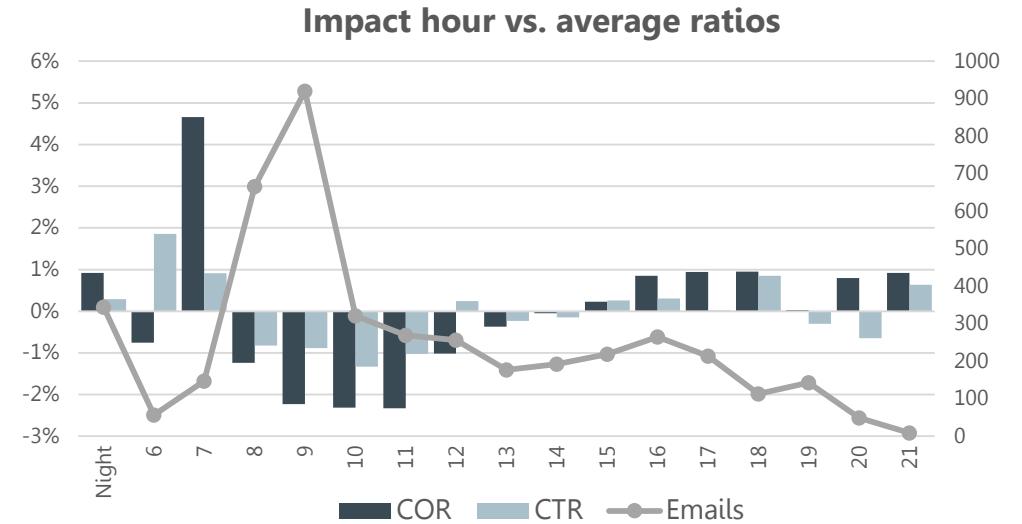


The graphs on this page show the ratios compared to average ratios, per hour and per day. The number of emails that are sent during the day is also visualised in the graph using a secondary axis on the right. The total emailing volume indicates how many emails are received at a specific time or day by consumers.

During the day the COR and the CTR behave quite similarly. We notice an increase in the COR and CTR around 07:00. Between 08:00 and 12:00 we notice a drop in both ratios, and at the end of the day there is an upward trend again. This is true for both ratios. Based on this information it could be argued that these moments are popular for sending an email, since the COR and CTR are high.

The number of emails that are sent during the day show opposite behaviour compared to the ratios. This suggests that the larger the number of emails that customers receive, the likelihood of opening/clicking declines. This means that there is something to gain in planning the moment of sending emails.

For working days we see a similar relation between the amount of emails sent and the ratios. Most emails are sent on Thursday, which is one of the least performing days to send a campaign. The least amount of emails are sent on a Monday, while the ratios are the highest. During the weekend, the ratios are lower, which is most evident on Sundays.



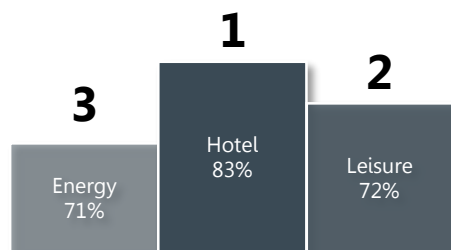
Note: The percentages shown in these graphs, illustrate the deviation (subtract/add) from the average ratio.

Charity is the most advanced industry in terms of overall adoption of techniques

Of these three, responsive design appears to be the most often used technique



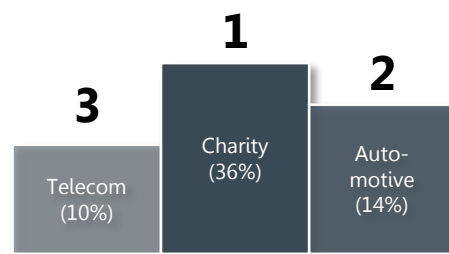
Dynamic content



Adoption

Total	35%
B2C	41%
B2B	18%

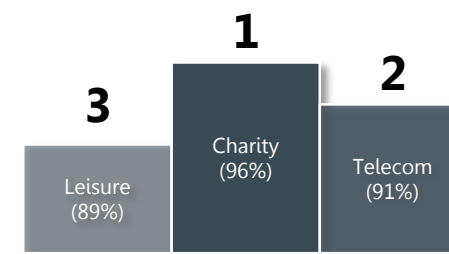
Personalised subject line



Adoption

Total	4%
B2C	5%
B2B	3%

Responsive design



Adoption

Total	68%
B2C	73%
B2B	56%

Description

Impact

Dynamic content and a personalised subject line significantly improve all ratios

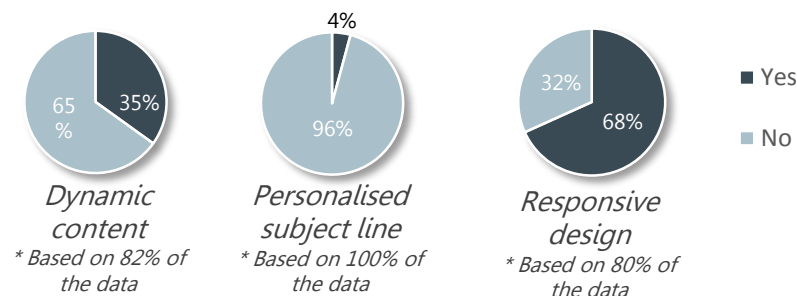


Email marketing has many techniques of which several are used frequently. Dynamic content, personalised subject lines and responsive design are measured in this report. Here we show how frequent these techniques are used and their impact on the COR, CTR and CTO. The effect of each of the techniques is identified separately. The percentage shown in the table is the average impact a technique has on the average ratios and the mobile vs. desktop distribution.

The right table indicates that most techniques improve all ratios and mobile usage. For responsive design this is slightly different, where no effect was found on the CTR and CTO (not significant) and a little effect on the COR.

In more than half of the campaigns, **dynamic content** is not applied. This while it has the largest positive impact on all ratios. The impact on the COR is profound, a 4,8% increase. **Personalised subject lines** are only used in a few campaigns. It also has a positive effect on all three ratios when used. **Responsive design** is applied in more than half of the campaigns. However, it appears to have a negative effect on the COR and no significant effect on the CTR and CTO. Considering that responsive design is only visible after opening an email, it is expected that the negative effect on COR has to do with a technical aspect of measuring. A responsive design does improve the ratio of mobile usage vs. desktop.

Were the techniques used in the campaigns?



Technique	COR	CTR	CTO	% Mobile opens	% Mobile clicks
Dynamic content	+ 4,8%	+ 1,82%	+ 2,88%	+ 2,7%	+ 2,5%
Personalised subject line	+ 1,8%	+ 0,87%	+ 1,31%	No effect	+ 1,3%
Responsive design	- 0,97%	No effect	No effect	+ 0,7%	+ 1,74%

Note: The percentages shown in the table, illustrate the deviation (subtract/add) from the average ratio.

Description

Impact

MOBILE USAGE

This section describes the mobile usage in this year's benchmark. The difference between mobile usage and desktop usage is highlighted. Additionally, we show the impact of time (hour and day) on mobile usage.

In 2015 41% of all emails were opened on a mobile device

Last year this was 30%

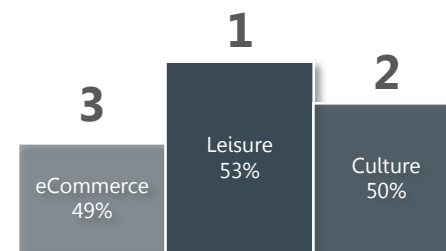


Mobile use is becoming more and more common in today's digital world. We also see this in the percentage of emails that are opened or clicked upon on mobile devices. This is based on all opens and clicks. Last year's benchmark indicated that 30% of all emails were opened on mobile devices. This year's benchmark, containing data for 2015, shows an increase of 11%, with a total of 41% of emails opened on mobile devices. In some industries mobile use has already overtaken desktop use with 53% of all opens on a mobile device.

The percentage of clicks also shows an increase compared to last year's benchmark. This year 34% of all clicks came from mobile. The CTO is still higher for desktops compared to mobile devices in 2015. Our expectation is that next year will be the tipping point, where mobile devices will outweigh the desktop usage in the B2C market.

Especially in B2C campaigns the use of mobile devices is more common, with 46% opens and 41% clicks. There is a slower adoption of mobile in B2B campaigns, with half the amount of clicks and one-third the amount of opens.

	% Opened on			% Clicked on		
	Mobile	Desktop	Total	Mobile	Desktop	Total
Total	41%	59%	100%	34%	66%	100%
B2C	46%	54%	100%	41%	59%	100%
B2B	31%	69%	100%	20%	80%	100%



Top 3 industries which campaigns are most often opened on mobile devices

Mobile devices are used more outside office hours



These graphs show the percentage of mobile opens and clicks per campaign, by time of the day. The other percentage that is not shown is opened on a desktop, combined it adds up to 100%.

During office hours on a working day, a desktop is used more than average. Outside office hours the usage of mobile is a lot higher, especially at night. The averages are shown in the table below.

In the weekends the mobile usage is a lot higher than during the week with 50% off all opens on mobile and 48% of all clicks. In the weekend the evening and nights again performs better than average. These are the times when people are more often found sitting on the couch watching television or lying in bed. Places where desktops are usually not found

% Opened on

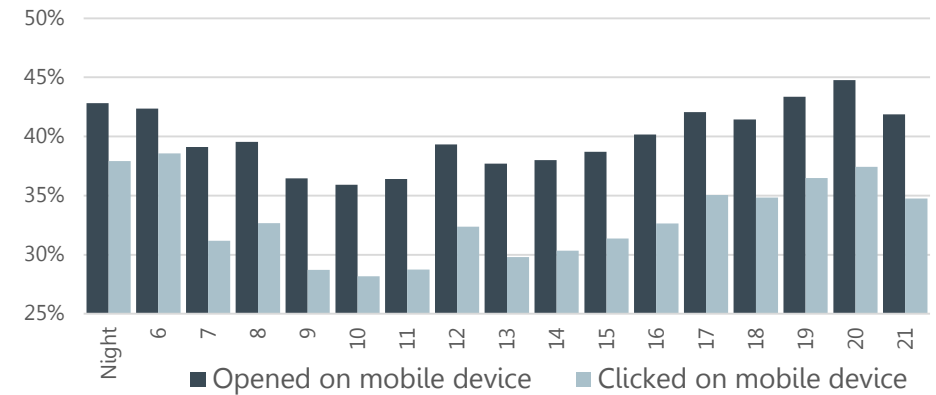


% Clicked on

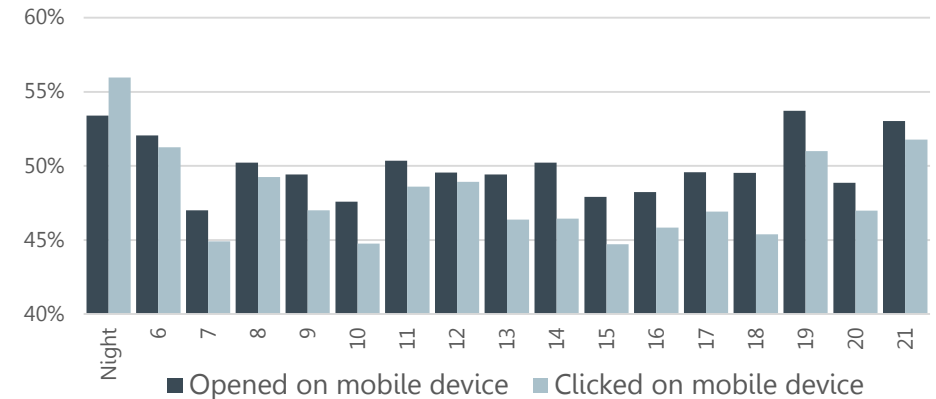


	Mobile	Laptop	Total	Mobile	Laptop	Total
Working day	40%	60%	100%	33%	67%	100%
Weekend	50%	50%	100%	48%	52%	100%

Time of sending a campaign on a working day



Time of sending a campaign on a weekend day



INDUSTRIES

This section contains industry specific information. First, we show the differences between the industries in size and ratios. Second, for each industry we discuss descriptive information on the first page. For the five largest industries, a second page is included in which we discuss the impact of variables on the ratios. The second page is not included for all industries due to small sample sizes. We refer to the reading guide for more detailed information on how to read this section.

Media and publishing and Retail are responsible for approximately half of the emails that are sent

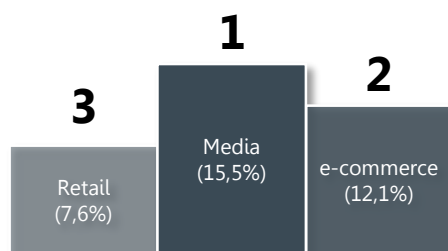


Media and publishing has the highest number of campaigns. This is a result of the high campaign frequency. In this sector consumers receive a relatively large amount of campaigns.

Even though retail (ecommerce only) has the second largest industry share campaign wise, it sends almost 40% of all mails. This is explained by the high average campaign size.

Retail (mixed) has the third largest industry share and has the largest number of companies that are sending campaigns.

Industry share



Industry	Campaigns	Emails (millions)
Media & Publishing	26.679 (15,5%)	413 (9,5%)
Retail (eCommerce only)	20.689 (12,1%)	1.727 (39,6%)
Retail (mixed)	13.011 (7,6%)	312 (7,1%)
Culture & Entertainment	10.423 (6,1%)	190 (4,3%)
Education	7.870 (4,6%)	60 (1,4%)
Telecom Services & Equipment	7.265 (4,2%)	201 (4,6%)
Business Services	6.021 (3,5%)	56 (1,3%)
Leisure	4.683 (2,7%)	119 (2,7%)
Banking & Insurance	4.128 (2,4%)	45 (1,0%)
Healthcare	3.692 (2,2%)	36 (0,8%)
Travel	3.527 (2,1%)	199 (4,6%)
Energy & Natural Resources	3.495 (2,0%)	25 (0,6%)
Construction Services	2.736 (1,6%)	26 (0,6%)
Not for profit	2.639 (1,5%)	30 (0,7%)
Industry & Producers	2.597 (1,5%)	12 (0,3%)
Charity	2.058 (1,2%)	81 (1,9%)
Hotel & catering	1.936 (1,1%)	145 (3,3%)
ICT & Internet	1.849 (1,1%)	31 (0,7%)
Automotive	1.791 (1,0%)	89 (2,0%)
Government	1.760 (1,0%)	12 (0,3%)
Wholesale	1.241 (0,7%)	15 (0,3%)
Agriculture	974 (0,6%)	5 (0,1%)
Transportation & Logistics	684 (0,4%)	4 (0,1%)
Fast Moving Consumer Goods	422 (0,2%)	7 (0,2%)
Other / unknown	39.515(23,0%)	523 (12,0%)
	171.684	4.363

* Additional information on industry level can be found in the appendix.

General information

Media

eCommerce

Retail

Culture

Education

Telecom

Business services

Leisure

Banking

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Overall ratios

Size and Frequency

Timing

Techniques

Mobile

Industries

Reading guide

Appendix

The charity and energy industry have the highest overall ratios



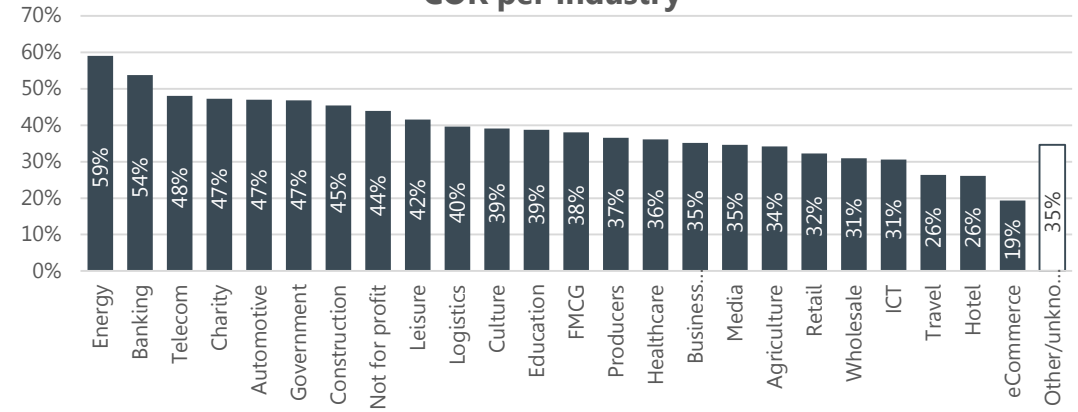
The graphs visualise the COR, CTR and CTO per industry ranking from high to low. We notice quite some variation between the industries. *Energy and utility* and *Charity* dominate for all three ratios.

If an industry has lower ratios, it does not indicate that the industry is performing worse than others. It could be explained by factors that are not measured in this benchmark, an example of this is given below.

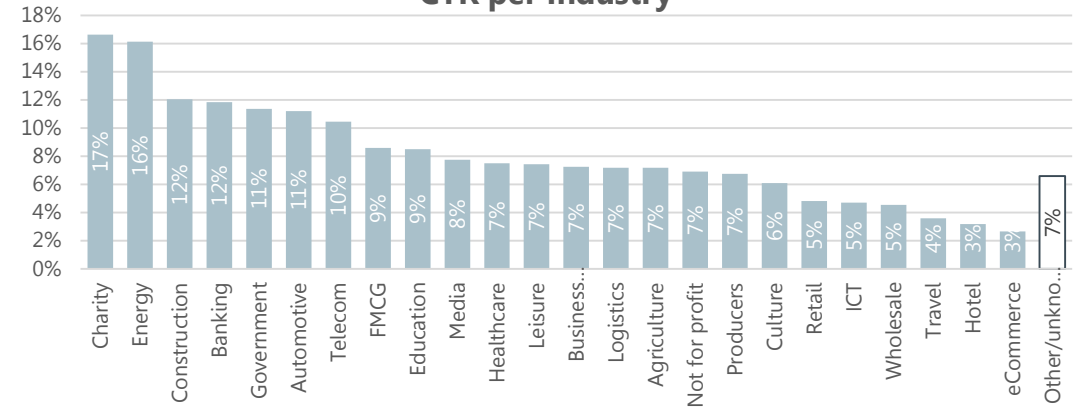


Example: Some industries often sell yearly subscriptions such as the telecom and energy industry. Consumers are more likely to open or click on campaigns that are distributed around the time their subscription ends, simply because the timing makes them more relevant. In some industries, companies can anticipate on this but this is not the case for each industry, for example in retail (eCommerce only). Such an industry sells multiple items a year and has a broad variety of articles in their web shops. Their campaigns can be individually tailored to the customer's preference, demographics and online behaviour during previous web visits.

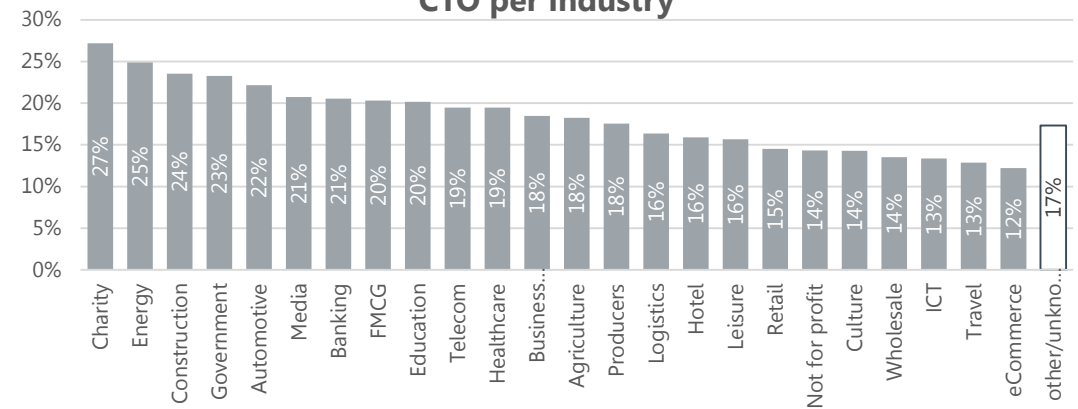
COR per Industry



CTR per Industry



CTO per Industry



Media and publishing (1/2): Highest campaign frequency but small campaigns resulting in average ratios



The media and publishing industry includes 413 million emails sent in 26.679 campaigns.

Ratios: Average
 Average campaign size*: Low
 Campaign frequency*: Very high
 Timing: Focus on office hours, high peak between 12:00 and 01:00
 Technique adoption: High (except personalised subject line)
 Mobile usage: Below average

Adoption techniques	B2C	B2B
Dynamic content	69%	11%
Personalised subject line	2%	0%
Responsive design	69%	71%

General information

Media

eCommerce

Retail

Culture

Education

Telecom

Business services

Leisure

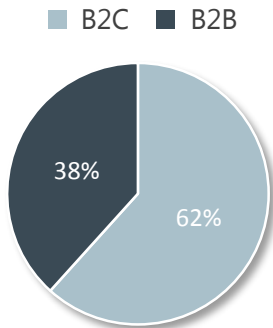
Banking

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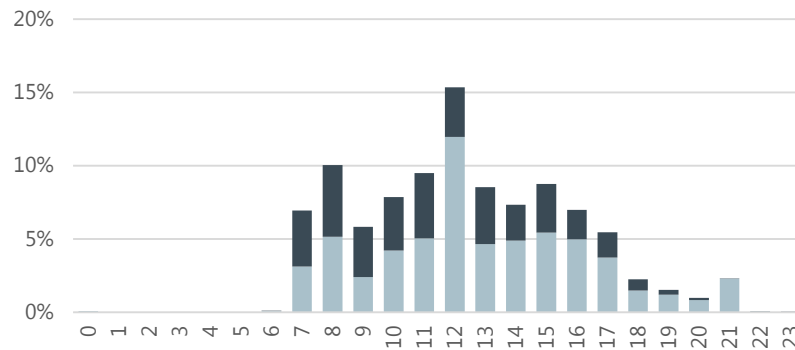


	B2C	B2B	Mobile device
Total	34,6%	7,8%	20,7%
B2C	35,3%	7,6%	19,7%
B2B	33,4%	8,1%	22,3%

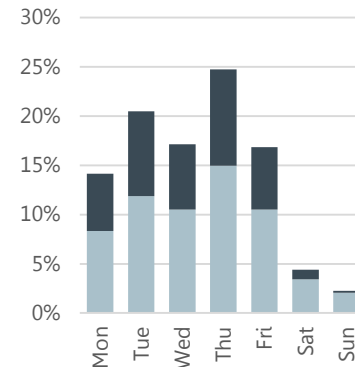
% Mobile device	B2C	B2B
Opens	39%	27%
Clicks	31%	18%



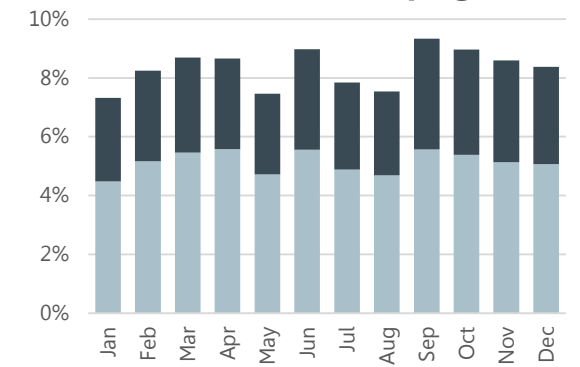
Hour sent (campaigns)



Day sent (campaigns)



Month sent (campaigns)



* These numbers can be found in the appendix

Media and publishing (2/2): High ratios outside office hours



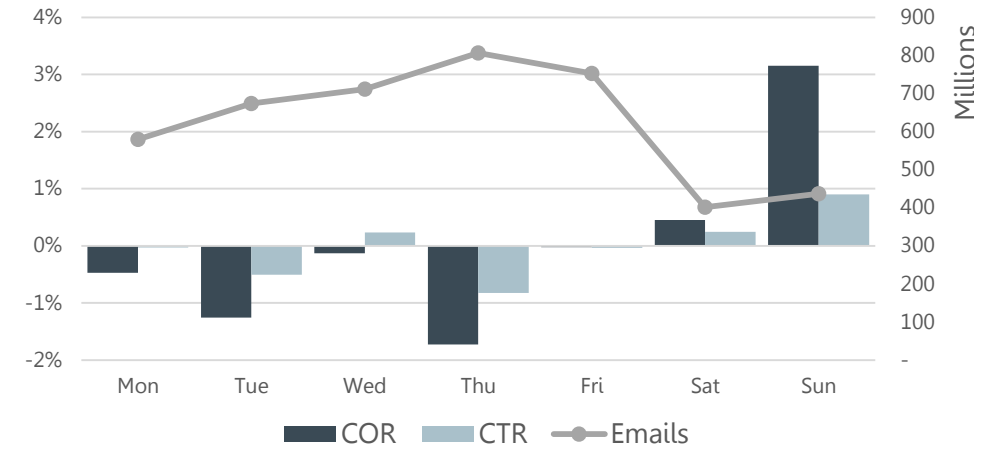
For the media and publishing industry we see that the weekend, especially Sunday shows the best COR and CTR. This is quite different from the overall benchmark where Sunday is the least performing day.

The best COR's and CTR's are found outside office hours, which is in line with the overall benchmark. The night seems to be a good time for opens in the media and publishing industry but the worst time for clicks. Also between 21:00-22:00 there is a big dip in predicted COR.

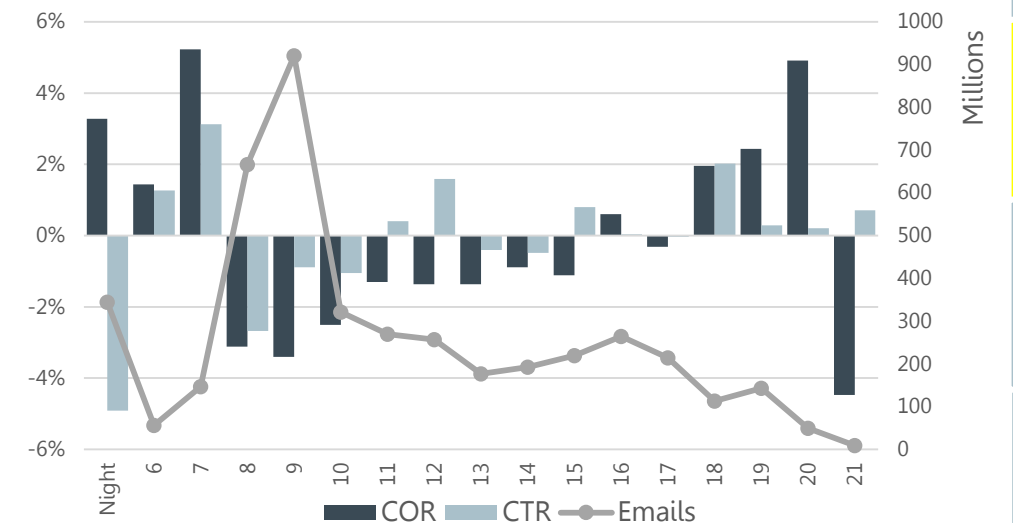
All techniques seems to have either no significant impact or a negative one. This is not in line with overall data except for the negative impact of responsive design on the COR's. 305 campaigns used a personalised subject line in 2015 in the media and publishing industry. With the data available no explanation is found why they perform considerably less.

Technique (% known in data)	COR	CTR
Dynamic content (51%)	No effect	-1,3%
Personalised subject line (100%)	-8,4%	-3,1%
Responsive design (74%)	-1,1%	No effect

Impact day vs. average ratios



Impact hour vs. average ratios



Retail (eCommerce only) (1/2): Highest email volume resulting in low ratios



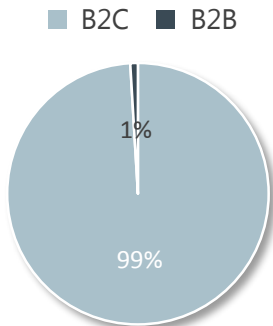
The retail (eCommerce only) industry is big with 1,7 billion emails sent in 20.689 campaigns.

Ratios: Below average. Especially the CTR is low with 2,7% compared to 7%
 Average campaign size*: High
 Campaign frequency*: High
 Timing: Focus on early morning, weekend high compared to average
 Technique adoption: The adoption of responsive design in B2C is high with 89%. Personalised subject lines are hardly used with 1%
 Mobile usage: High with almost 50%

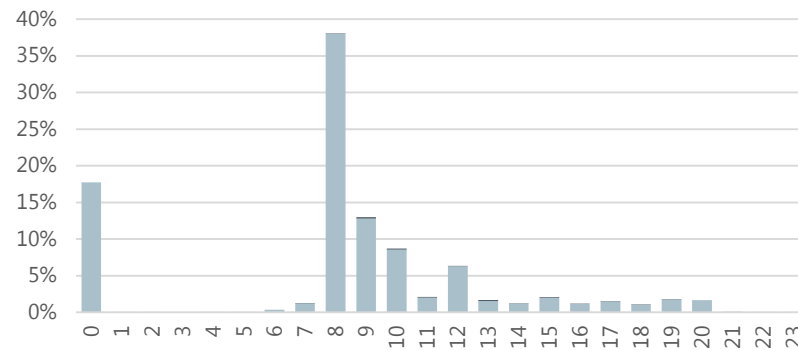
Adoption techniques	B2C	B2B
Dynamic content	53%	0%
Personalised subject line	1%	1%
Responsive design	89%	3%

% Mobile device	B2C	B2B
Opens	49%	38%
Clicks	49%	39%

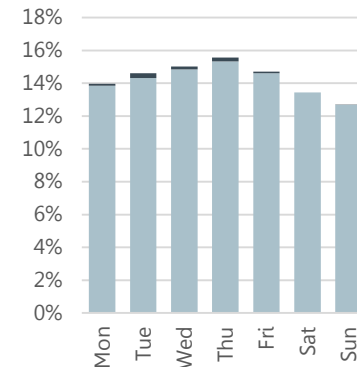
Total	19,3%	2,7%	12,2%
B2C	19,2%	2,7%	12,2%
B2B	30,0%	3,0%	9,5%



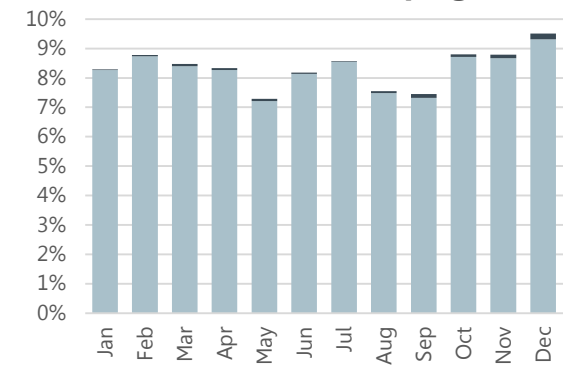
Hour sent (campaigns)



Day sent (campaigns)



Month sent (campaigns)



* These numbers can be found in the appendix

Retail (eCommerce only) (2/2): High ratios at 08:00 in the morning and 17:00 in the afternoon



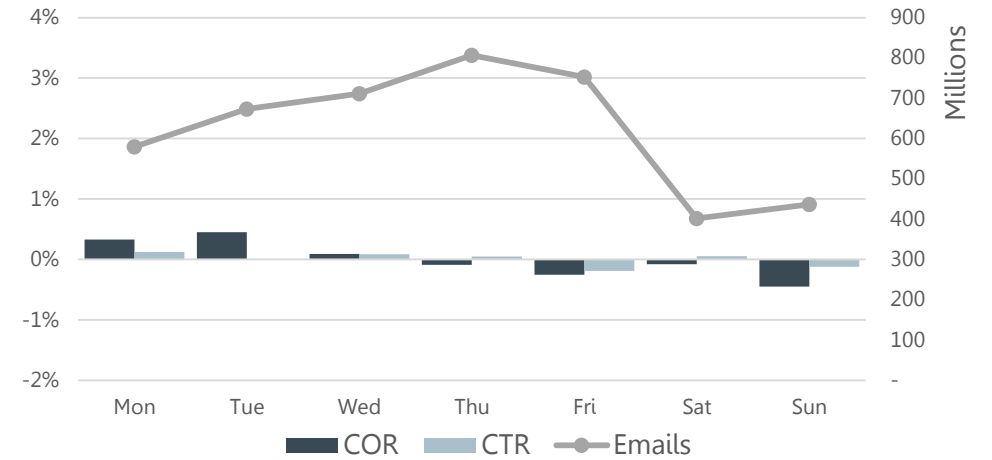
For retail (eCommerce only) we see that the weekday a campaign is sent has a small impact on the COR's and CTR's. Monday and Tuesday perform slightly better and Friday and Sunday slightly worse.

Between 08:00 and 09:00 is the best time to send an email in the retail (eCommerce only) industry which is the only hour that considerably scores above average. As can be seen in the previous slide, 38% of the campaign in this industry are send at this hour which make all other hours perform under average.

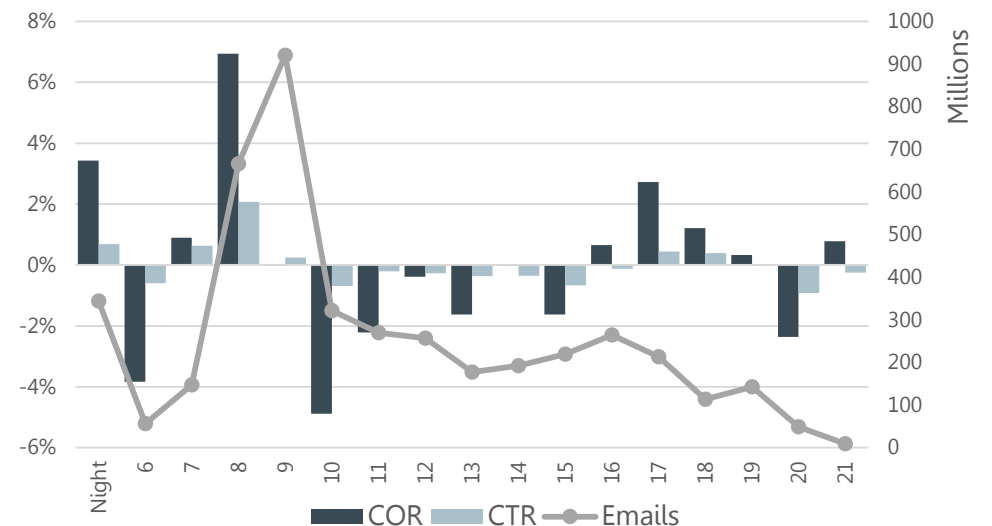
Dynamic content is used in roughly half the campaigns and on average lowers the COR with -3,4% but increases the CTR with 1,0%. A personalised subject line is hardly used in the retail (eCommerce only) industry and when it is done it seems to have a negative effect. Responsive design is widely used with 88% adoption and works well in this industry with higher COR of 2,1% and higher CTR of 0,7%.

Technique (% known in data)	COR	CTR
Dynamic content (99%)	-3,4%	1,0%
Personalised subject line (100%)	-2,1%	-0,7%
Responsive design (98%)	2,1%	0,7%

Impact day vs. average ratios



Impact hour vs. average ratios



- General information
- Media
- eCommerce**
- Retail
- Culture
- Education
- Telecom
- Business services
- Leisure
- Banking
- ...

- Overall ratios
- Size and Frequency
- Timing
- Techniques
- Mobile
- Industries**
- Reading guide
- Appendix

Retail (mixed) (1/2): Low CTR and a strong focus on 16:00 till 17:00



In the retail (mixed) industry 312 million emails are sent in 13.011 campaigns.

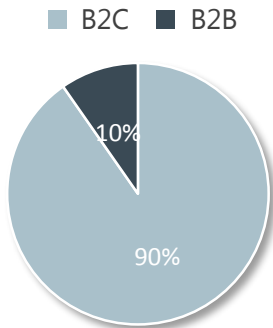
Ratios: Below average. The CTR is especially low with 4,8% compared to 7%
 Average campaign size*: Below average
 Campaign frequency*: Average
 Timing: Thursday is by far the most popular day with 36% of all campaigns. Between 16:00 and 17:00 is extremely popular with 33%
 Technique adoption: The adoption of dynamic content in B2C is low with 13% compared to 41% on average in other industries. Personalised subject lines adoption is low too
 Mobile usage: Slightly below average



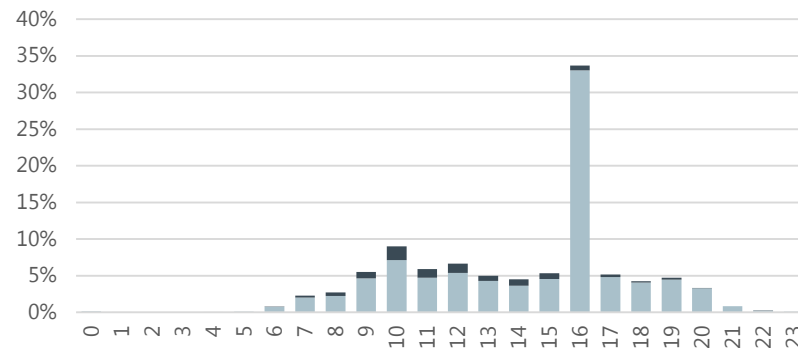
	Total	32,2%	4,8%	14,5%
B2C	32,2%	4,9%	14,8%	
B2B	32,1%	4,1%	11,9%	

Adoption techniques	B2C	B2B
Dynamic content	13%	20%
Personalised subject line	2%	0%
Responsive design	73%	53%

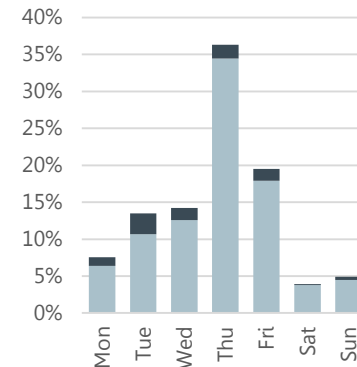
% Mobile device	B2C	B2B
Opens	42%	18%
Clicks	40%	19%



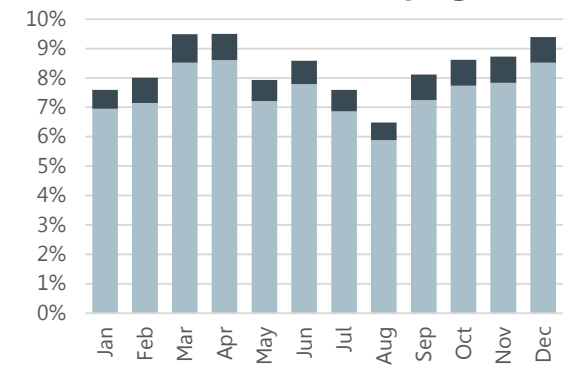
Hour sent (campaigns)



Day sent (campaigns)



Month sent (campaigns)



* These numbers can be found in the appendix

Retail (mixed) (2/2): High ratios between 15:00 and 22:00, day has low impact



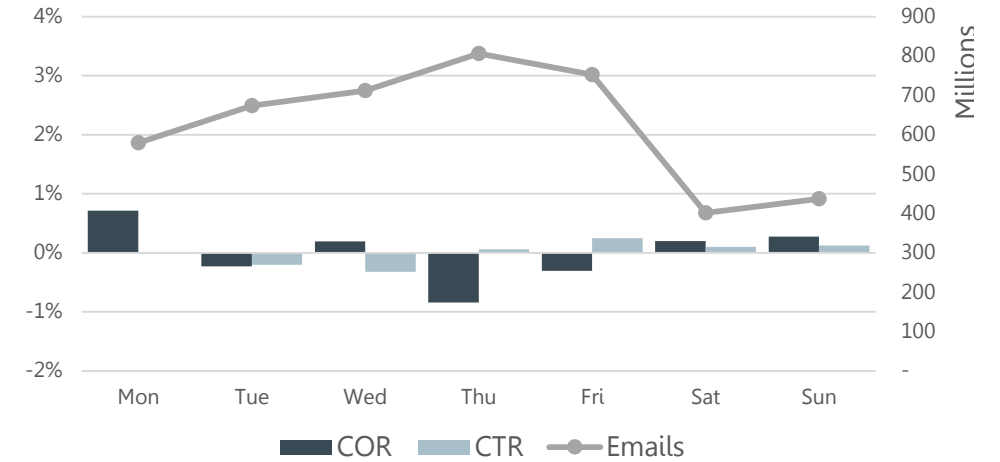
For the retail (mixed) we see that the weekday on which a campaign is sent has a small impact on the COR's and CTR's. Monday and the weekend have better COR's while Friday has the best CTR.

Before 12:00 the ratio's are below average and after 12:00 scores better than average.

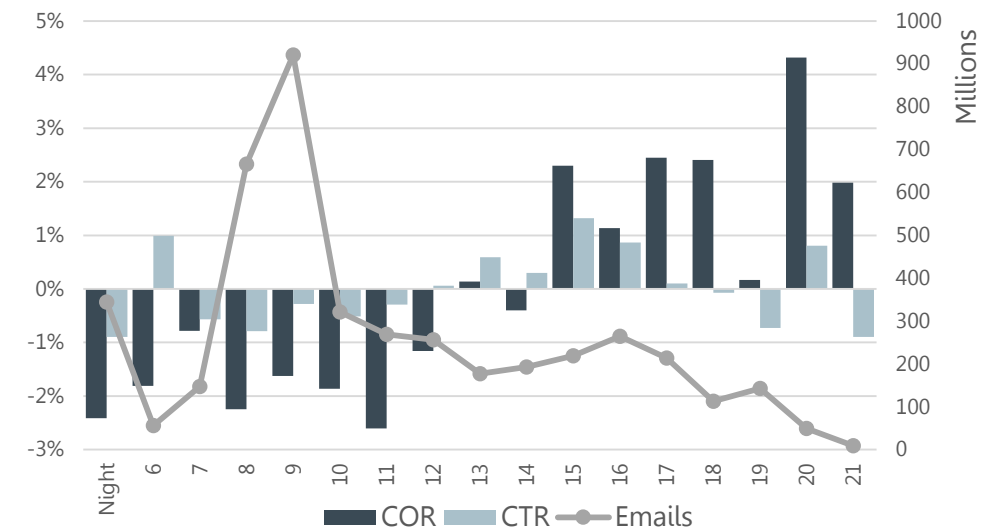
Dynamic content is used in only 14% of the campaigns but increases the COR with 5,6%. Also the CTR increase with 1,0% when dynamic content is used. A personalised subject line is hardly used in the retail (mixed) industry and when it is done it seems to lower the COR with -1,4% but increase the CTR with 1,5%. Responsive design is used in almost three quarters of the campaigns but lowers the COR with -2,2%. The CTR however, increases with 0,6%.

Technique (% known in data)	COR	CTR
Dynamic content (83%)	5,6%	1,0%
Personalised subject line (100%)	-1,4%	1,5%
Responsive design (76%)	-2,2%	0,6%

Impact day vs. average ratios



Impact hour vs. average ratios



- General information
- Media
- eCommerce
- Retail**
- Culture
- Education
- Telecom
- Business services
- Leisure
- Banking
- ...

- Overall ratios
- Size and Frequency
- Timing
- Techniques
- Mobile
- Industries**
- Reading guide
- Appendix

Culture and entertainment (1/2): COR is higher than average, the CTR and CTO are lower



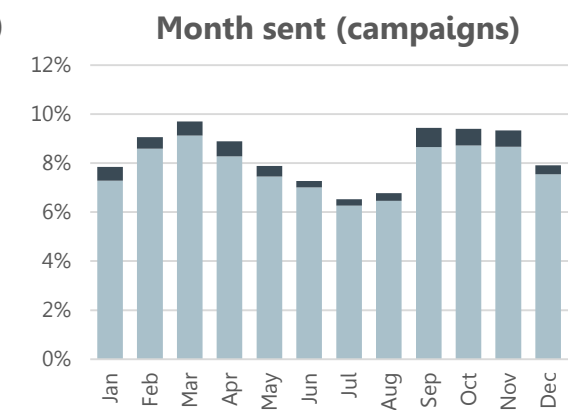
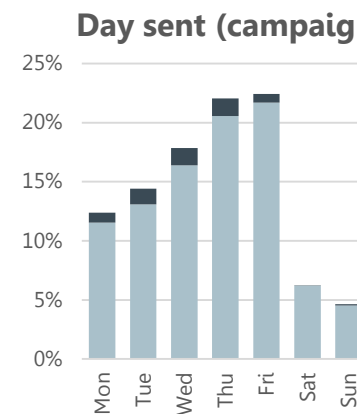
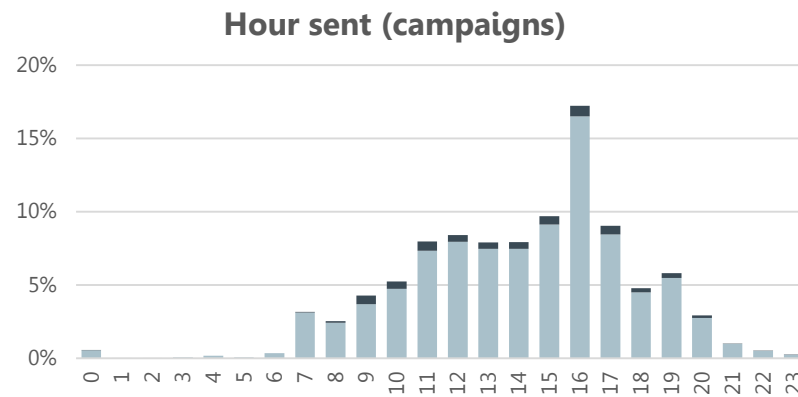
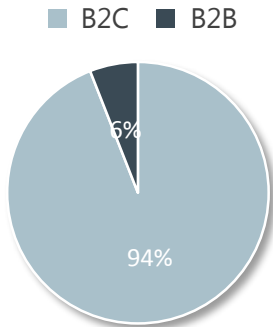
In the culture and entertainment industry 25 million emails are sent in 3.495 campaigns.

Ratios: Above average (COR) and below average (CTR, CTO)
 Average campaign size*: Below average
 Campaign frequency*: Above average
 Timing: During office hours with a peak between 16:00 and 17:00
 Technique adoption: Dynamic content adoption is high for B2C and very low for B2B. For personalised subject line it is higher and for responsive design lower
 Mobile usage: Average

Adoption techniques	B2C	B2B
Dynamic content	53%	1%
Personalised subject line	6%	13%
Responsive design	38%	38%

% Mobile device	B2C	B2B
Opens	46%	27%
Clicks	46%	27%

Total	39,1%	6,1%	14,3%
B2C	39,3%	6,1%	14,3%
B2B	35,3%	5,3%	13,6%



* These numbers can be found in the appendix

Culture and entertainment (2/2): High COR on Monday, low ratios between 08:00 and 09:00 in the morning.



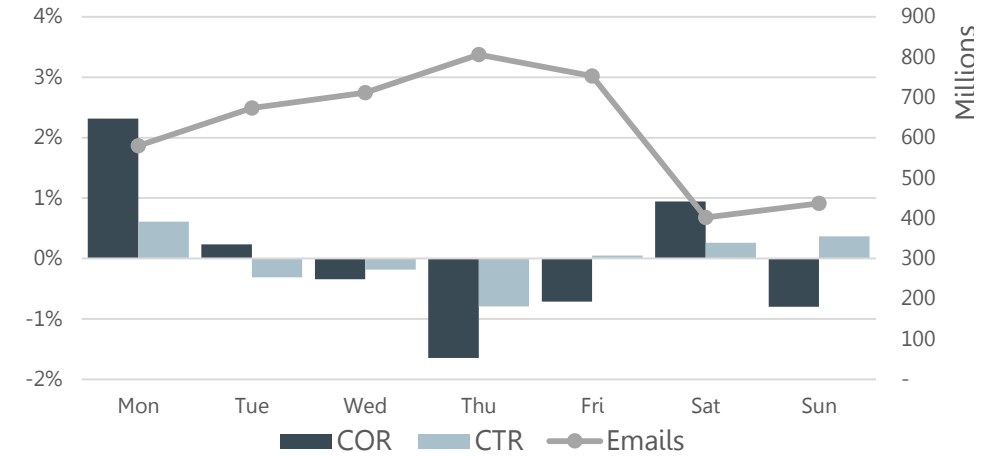
For the culture and entertainment industry we see that Monday works really well with the highest COR's and CTR's Saturday is the next best day. Thursday performs least with -1,6% COR and -0,8% CTR.

The hour sent has an a great positive impact between 07:00 and 08:00 with 14% higher COR and 2% higher CTR. The following two hours between 08:00 and 10:00 are the worst performing with again high delta's. The remaining hours are all near the averages.

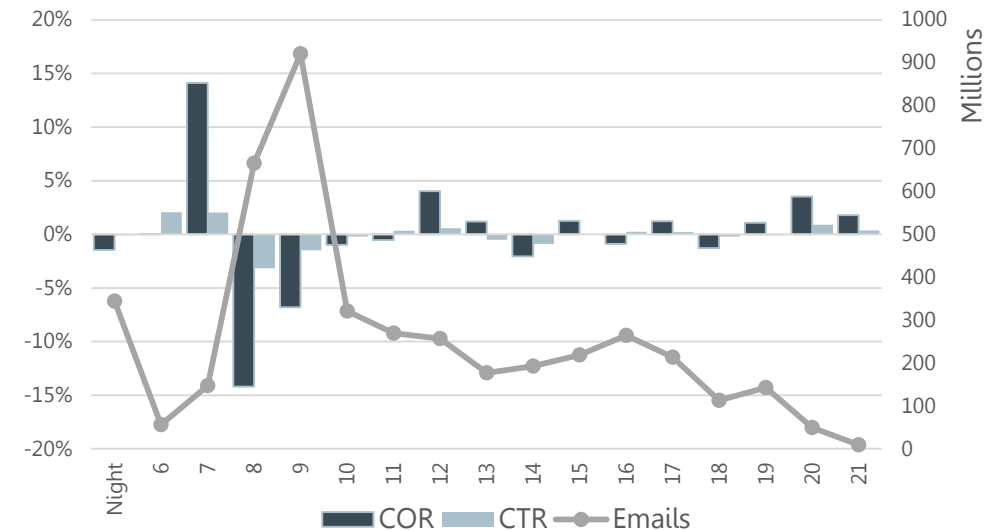
Dynamic content is used in half of the campaigns and increases the COR with 4,1%. Also the CTR increase with 2,6% when dynamic content is used. A personalised subject line is hardly used in the culture and entertainment industry and when it is done it seems to increase the COR with 1,2%. Responsive design is used in 38% of the campaigns and lowers the COR with -0,6%.

Technique (% known in data)	COR	CTR
Dynamic content (96%)	4,1%	2,6%
Personalised subject line (100%)	1,2%	No effect
Responsive design (86%)	-0,6%	No effect

Impact day vs. average ratios



Impact hour vs. average ratios



- General information
- Media
- eCommerce
- Retail
- Culture**
- Education
- Telecom
- Business services
- Leisure
- Banking
- ...

Education (1/2): Small campaigns with a high focus on office hours



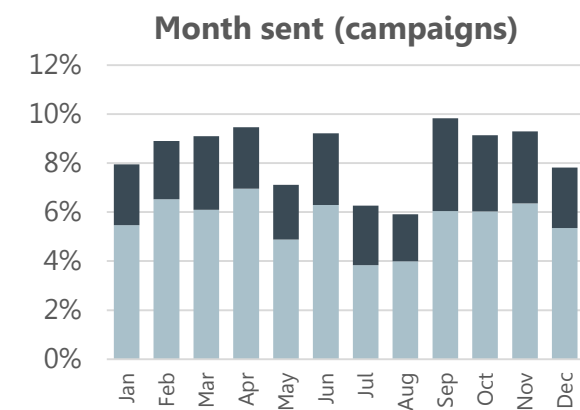
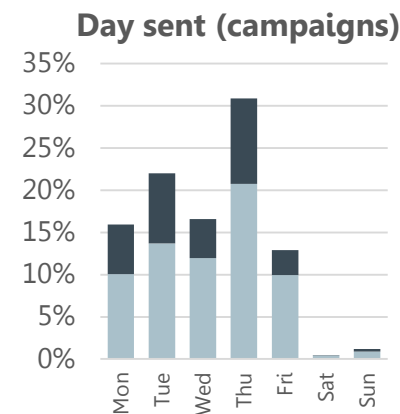
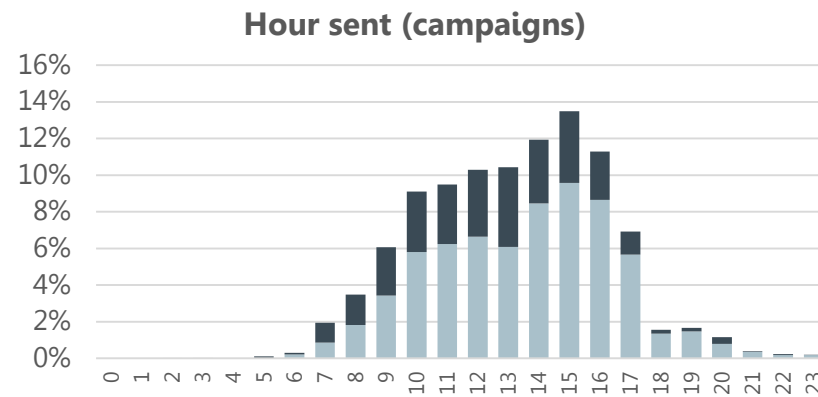
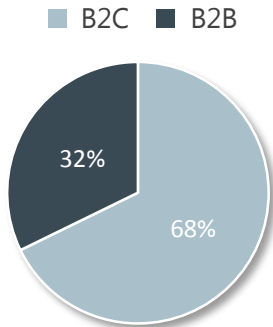
The education industry includes 60 million emails sent in 7.870 campaigns.

- Ratios: Above average
- Average campaign size*: Small with 7k compared to 33k on average
- Campaign frequency*: Average
- Timing: High focus on office hours
- Technique adoption: The adoption of responsive design is high for B2C
- Mobile usage: Below average

Adoption techniques	B2C	B2B
Dynamic content	38%	16%
Personalised subject line	3%	3%
Responsive design	82%	57%

% Mobile device	B2C	B2B
Opens	34%	25%
Clicks	27%	20%

Total	38,7%	8,5%	20,1%
B2C	40,5%	9,0%	20,1%
B2B	34,9%	7,4%	20,3%



* These numbers can be found in the appendix

Education (2/2): High ratios on Sunday, higher ratios between 13:00 and 18:00



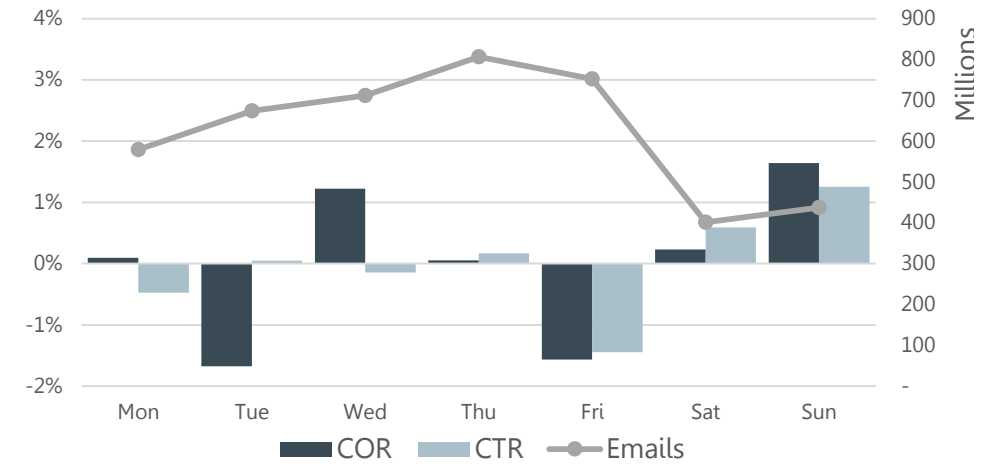
For the education industry we see that Sunday works really well with the highest COR's and CTR's. Saturday is the next best day. This is different from average where Sunday is the least performing day

Educational campaigns are best opened in the afternoon and evening and best clicked upon in the afternoon between 13:00 and 16:00. The evening and night perform below average.

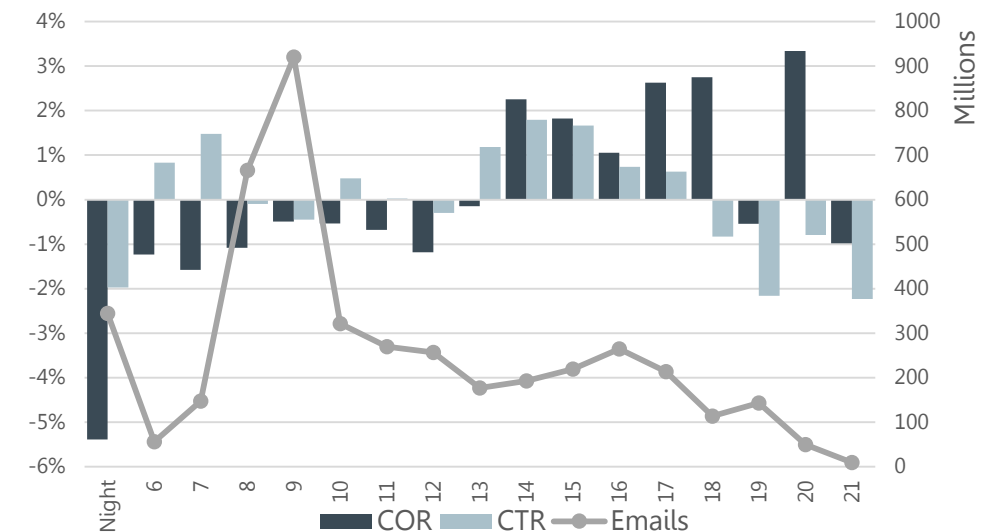
Dynamic content is used in only 30% of the campaigns but increases the COR with 3,0%. Also the CTR increase with 1,0% when dynamic content is used. A personalised subject line is hardly used in the education industry and when it is done it seems to increase the COR with 3,4%. Responsive design is used in three quarters of the campaign and lowers the COR with -4,5%.

Technique (% known in data)	COR	CTR
Dynamic content (73%)	3,0%	1,0%
Personalised subject line (100%)	3,4%	No effect
Responsive design (72%)	-4,5%	No effect

Impact day vs. average ratios



Impact hour vs. average ratios



- General information
- Media
- eCommerce
- Retail
- Culture
- Education**
- Telecom
- Business services
- Leisure
- Banking
- ...

Telecom services and equipment: High ratios and high adoption of techniques



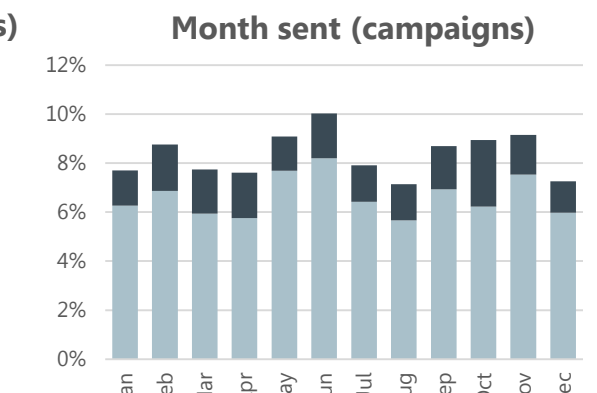
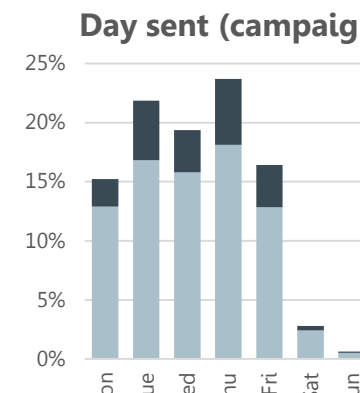
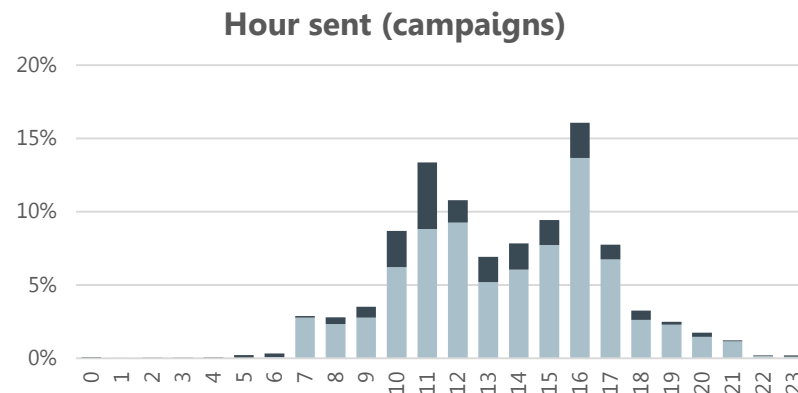
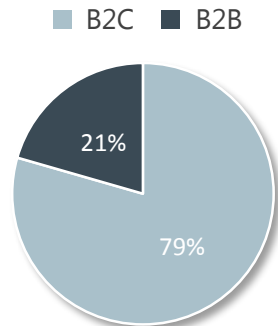
In the telecom services and equipment industry 202 million emails are sent in 7.265 campaigns.

Ratios: High, especially the COR, which is 51% compared to 35% on average
 Average campaign size*: Average
 Campaign frequency*: High with 227 compared to 58 campaigns on average
 Timing: Strong focus on office hours
 Technique adoption: Very high, especially for B2C campaigns
 Mobile usage: Average

Adoption techniques	B2C	B2B
Dynamic content	74%	59%
Personalised subject line	12%	1%
Responsive design	99%	58%

% Mobile device	B2C	B2B
Opens	46%	22%
Clicks	42%	18%

Total	48,0%	10,4%	19,5%
B2C	50,5%	11,8%	21,3%
B2B	38,5%	5,4%	12,3%



* These numbers can be found in the appendix

- General information
- Media
- eCommerce
- Retail
- Culture
- Education
- Telecom**
- Business services
- Leisure
- Banking
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- Overall ratios
- Size and Frequency
- Timing
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- Industries**
- Reading guide
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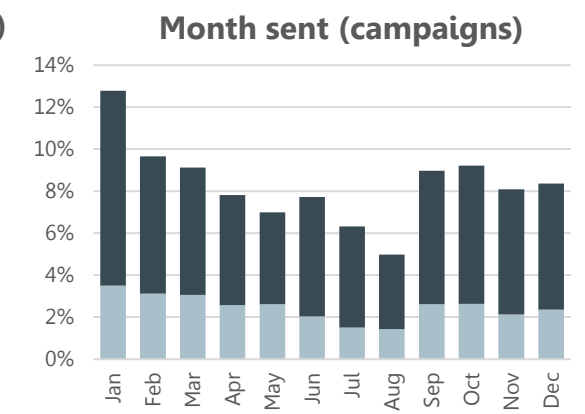
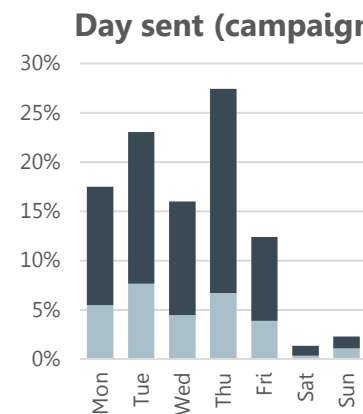
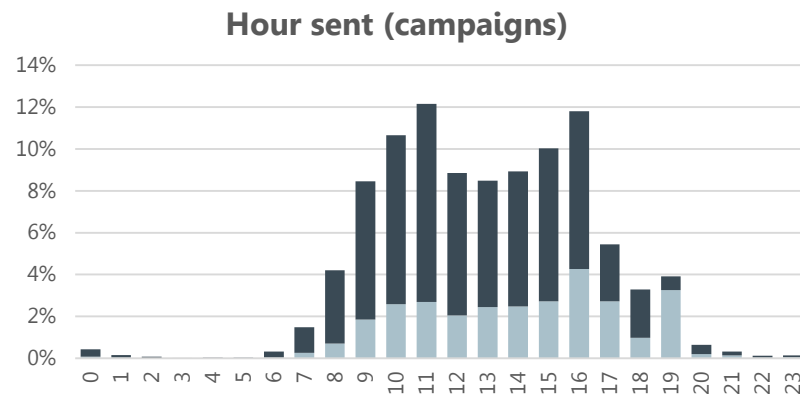
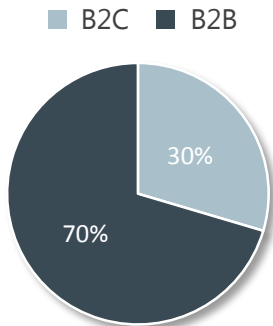
Business services: Average overall ratios while average campaign size is small



In the business services industry 56 million emails are sent in 6.021 campaigns.

Ratios: B2C campaigns perform better for all ratios, especially the COR
 Average campaign size*: Low with 9k compared to 33k on average
 Campaign frequency*: Below average
 Timing: Strong focus on office hours
 Technique adoption: Dynamic content adoption is high for B2B with 35% compared to 18% on average. Personalised subject adoption in B2C is higher than average 13% vs. 5%. Responsive design is less adopted
 Mobile usage: Below average

Total	35,2%	7,3%	18,5%
B2C	41,0%	8,8%	18,9%
B2B	32,7%	6,6%	18,2%



Adoption techniques	B2C	B2B
Dynamic content	38%	35%
Personalised subject line	13%	2%
Responsive design	56%	43%

% Mobile device	B2C	B2B
Opens	37%	23%
Clicks	35%	21%

* These numbers can be found in the appendix




Leisure: High COR, technique adoption and mobile usage

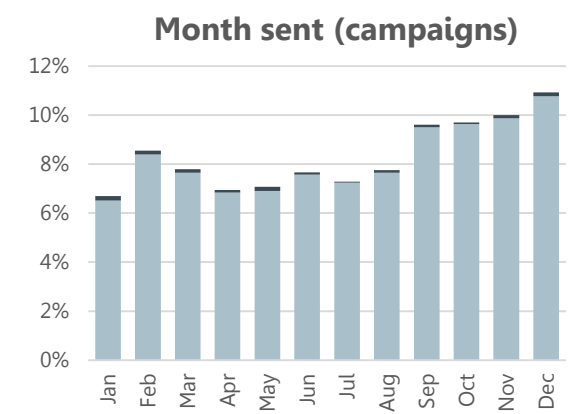
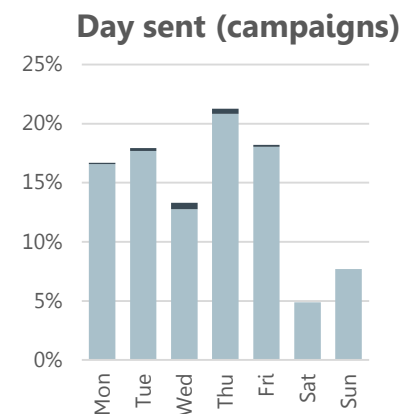
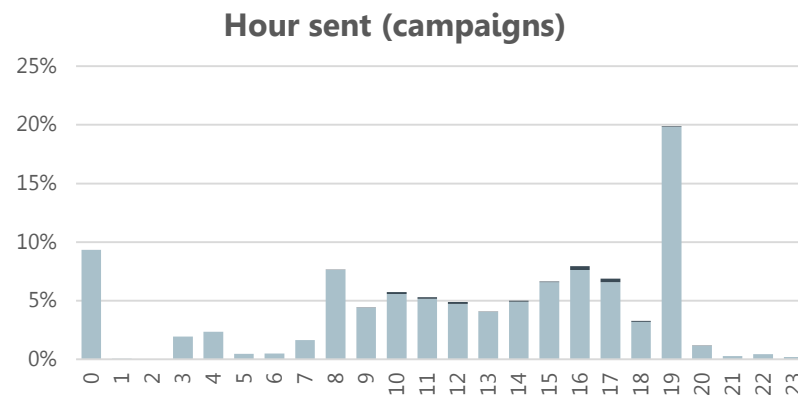
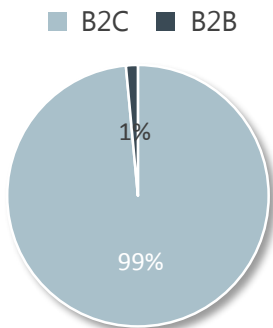
i In the leisure industry 119 million emails are sent in 4.683 campaigns.

Ratios: Above average, especially the COR
 Average campaign size*: Average
 Campaign frequency*: Above average
 Timing: High peak between 19:00 and 20:00
 Technique adoption: High for dynamic content and responsive design
 Mobile usage: High

Adoption techniques	B2C	B2B
Dynamic content	73%	9%
Personalised subject line	4%	9%
Responsive design	90%	0%

% Mobile device	B2C	B2B
Opens	51%	22%
Clicks	43%	23%

			
Total	41,5%	7,4%	15,7%
B2C	41,5%	7,5%	15,8%
B2B	44,9%	3,1%	8,8%



* These numbers can be found in the appendix

- General information
- Media
- eCommerce
- Retail
- Culture
- Education
- Telecom
- Business services
- Leisure**
- Banking
- ...

- Overall ratios
- Size and Frequency
- Timing
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- Mobile
- Industries**
- Reading guide
- Appendix

Banking and insurance: Small campaigns with high ratios and strong focus on office hours



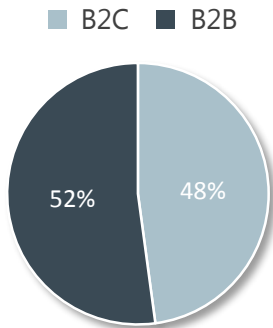
The banking and insurance industry includes 45 million emails sent in 4.128 campaigns.

Ratios: High for all ratios
 Average campaign size*: Small with 10k compared to 33k on average
 Campaign frequency*: Average
 Timing: Strong focus on office hours
 Technique adoption: The adoption of dynamic content and responsive design is high for B2C campaigns, whereas B2B adoption is low for these techniques
 Mobile usage: Below average

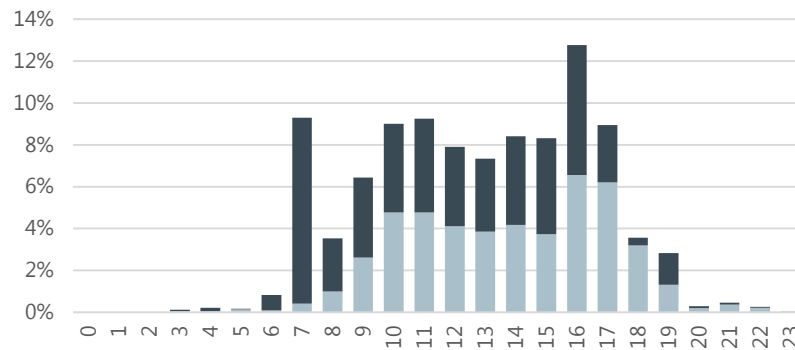
Adoption techniques	B2C	B2B
Dynamic content	60%	15%
Personalised subject line	3%	8%
Responsive design	86%	43%

% Mobile device	B2C	B2B
Opens	38%	14%
Clicks	30%	11%

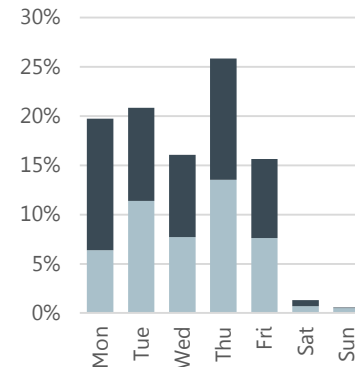
Total	53,7%	11,8%	20,5%
B2C	49,5%	11,7%	21,4%
B2B	57,6%	11,9%	19,7%



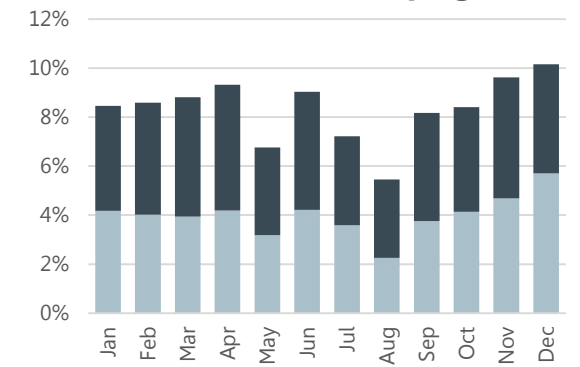
Hour sent (campaigns)



Day sent (campaigns)



Month sent (campaigns)






* These numbers can be found in the appendix

Healthcare: Ratios slightly above average and a small average campaign size

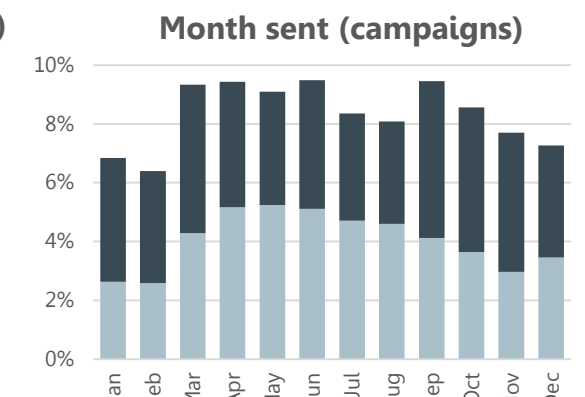
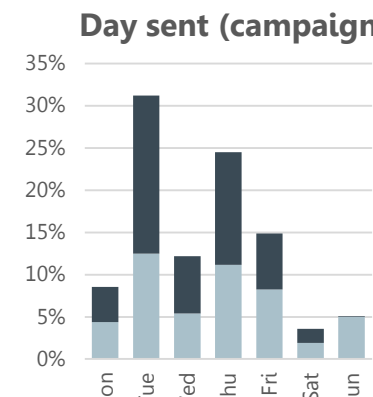
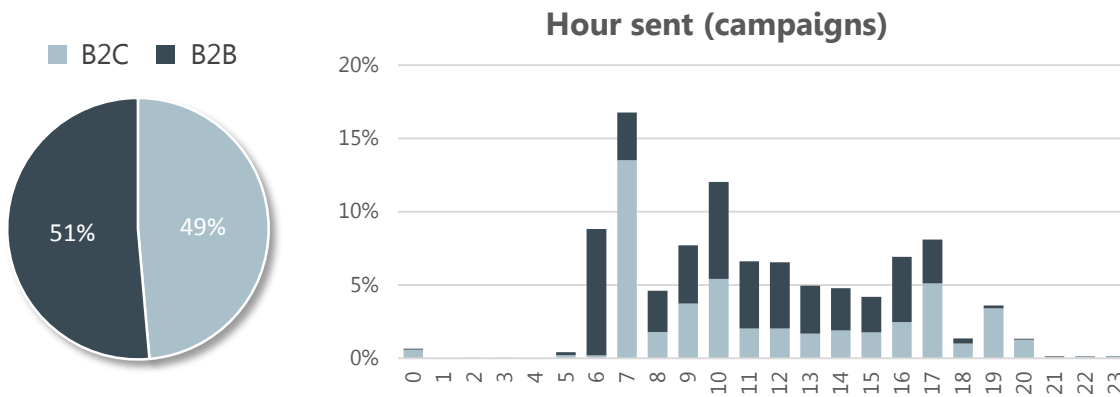
i In the healthcare industry 16 million emails are sent in 1.898 campaigns.

Ratios: Slightly above average
 Average campaign size*: Small with 11k compared to 33k on average
 Campaign frequency*: Average
 Timing: Tuesday and Thursday are popular days. The busiest hour is between 07:00 and 08:00
 Technique adoption: Average
 Mobile usage: Average

Adoption techniques	B2C	B2B
Dynamic content	15%	27%
Personalised subject line	3%	0%
Responsive design	70%	57%

			
Total	36,1%	7,5%	19,5%
B2C	38,2%	6,9%	16,8%
B2B	34,1%	8,1%	21,9%

% Mobile device	B2C	B2B
Opens	40%	35%
Clicks	38%	31%



* These numbers can be found in the appendix

Travel: Low ratios and a large average campaign size



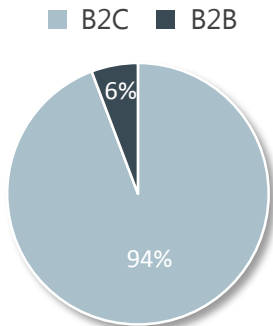
In the travel industry 199 million emails are sent in 3.527 campaigns.

Ratios: Low
 Average campaign size*: Large with 56k compared to 33k on average
 Campaign frequency*: Above average
 Timing: Wednesday is the most popular day for sending emails, while Monday scores below average
 Technique adoption: Dynamic content is hardly used in B2C with 8% compared to 41% on average
 Mobile usage: Average

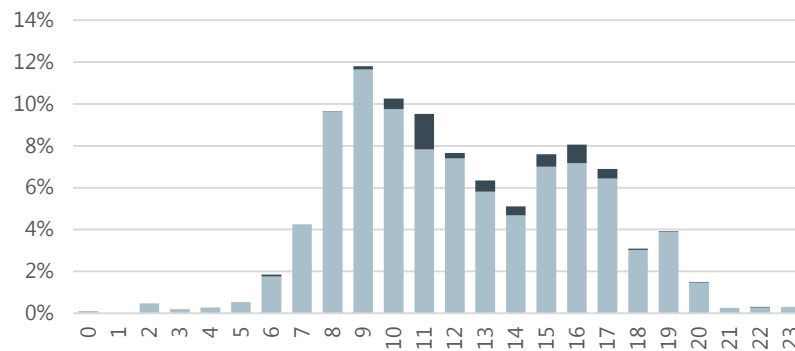
Adoption techniques	B2C	B2B
Dynamic content	8%	35%
Personalised subject line	2%	0%
Responsive design	76%	67%

Total	26,3%	3,6%	12,9%
B2C	24,9%	3,5%	12,9%
B2B	49,2%	5,9%	11,4%

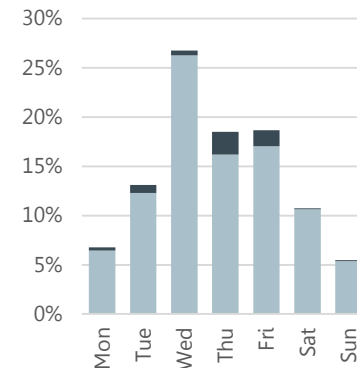
% Mobile device	B2C	B2B
Opens	45%	29%
Clicks	41%	25%



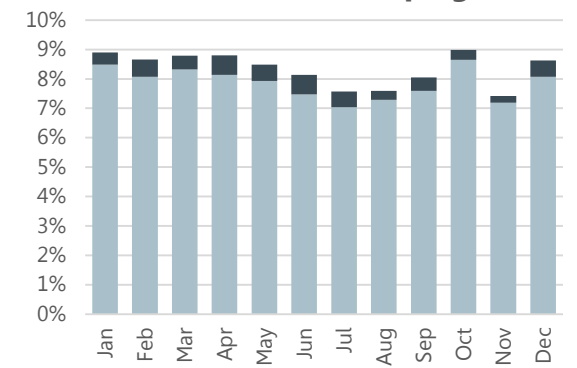
Hour sent (campaigns)



Day sent (campaigns)



Month sent (campaigns)



* These numbers can be found in the appendix

General information

...

Leisure

Banking

Healthcare

Travel

Energy

Construction

Not-for-profit

Producers

...

Overall ratios

Size and Frequency

Timing

Techniques

Mobile

Industries

Reading guide

Appendix

Energy and natural resources: High ratios, small average campaign size and high adoption of techniques



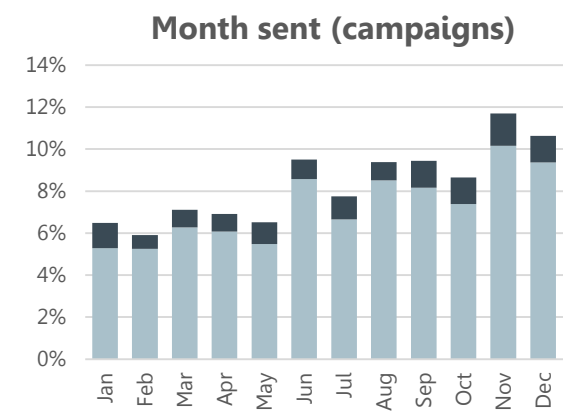
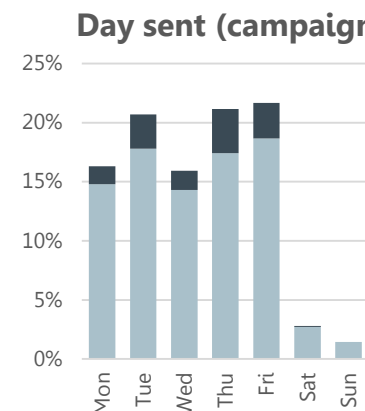
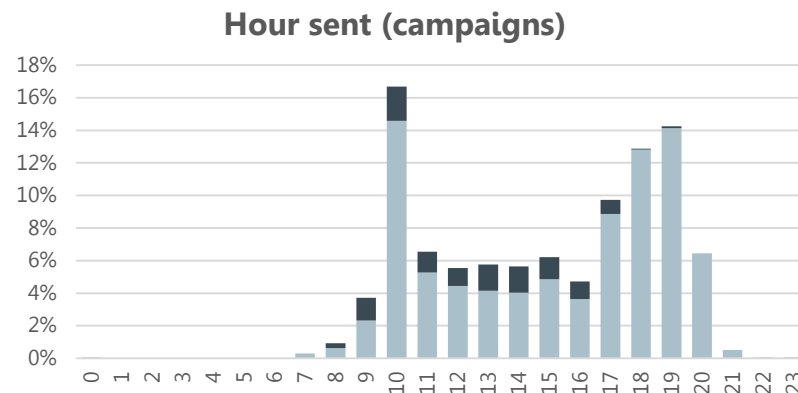
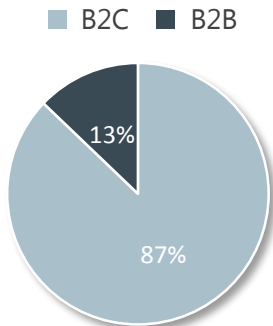
The energy and natural resources industry includes 25 million emails sent in 3.495 campaigns.

Ratios: Very high
 Average campaign size*: Small with 7k compared to 33k on average
 Campaign frequency*: High with 121 campaigns compared to 58 on average
 Timing: Focus on office hours and early evenings
 Technique adoption: High
 Mobile usage: Below average

Adoption techniques	B2C	B2B
Dynamic content	81%	11%
Personalised subject line	8%	0%
Responsive design	91%	63%

Total	59,0%	16,1%	24,9%
B2C	61,1%	17,2%	25,9%
B2B	44,6%	9,0%	17,7%

% Mobile device	B2C	B2B
Opens	45%	22%
Clicks	33%	12%



* These numbers can be found in the appendix

Construction services: High ratios and a small average campaign size



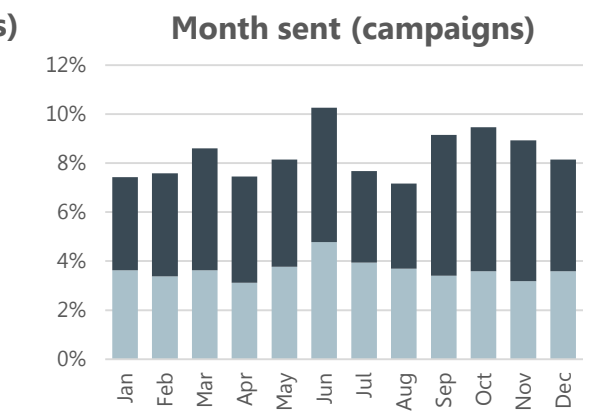
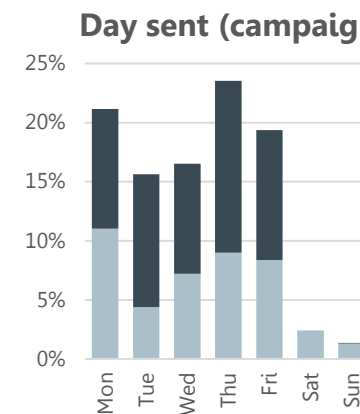
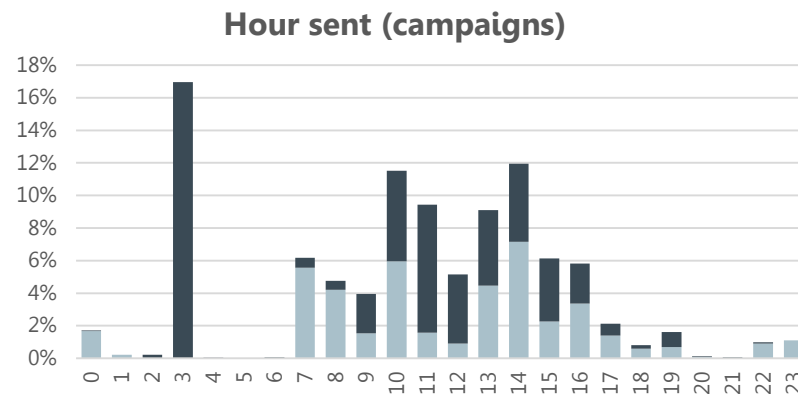
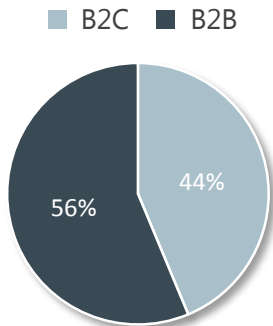
The construction services industry includes 26 million emails sent in 2.736 campaigns.

Ratios: High for all ratios
 Average campaign size*: Small with 10k compared to 33k on average
 Campaign frequency*: Average
 Timing: Focus on office hours, except the peak of B2B-campaigns between 03:00 and 04:00
 Technique adoption: High for dynamic content, whereas personalised subject line adoption is low. Responsive design is low in B2C, although it is much higher than in B2B.
 Mobile usage: Average

Adoption techniques	B2C	B2B
Dynamic content	79%	21%
Personalised subject line	4%	1%
Responsive design	23%	73%

Total	45,4%	12,0%	23,5%
B2C	54,1%	15,9%	27,6%
B2B	38,7%	9,0%	20,4%

% Mobile device	B2C	B2B
Opens	42%	30%
Clicks	43%	28%



* These numbers can be found in the appendix

Not-for-profit: High COR and high adoption of dynamic content



In the not-for-profit industry 30 million emails are sent in 2.639 campaigns.

Ratios: COR is quite high with 44% compared to 35% on average. The CTR is average resulting in a low CTO

Average campaign size*: Small with 11k compared to 33k on average

Campaign frequency*: Average

Timing: Slightly more focus on office hours than average

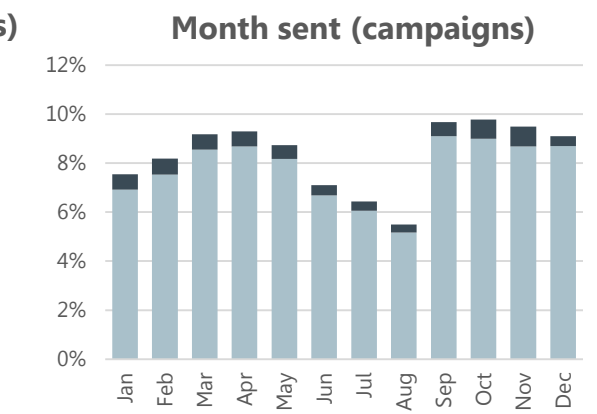
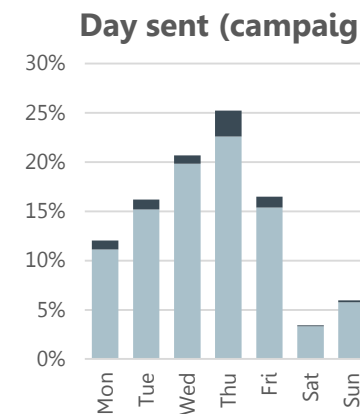
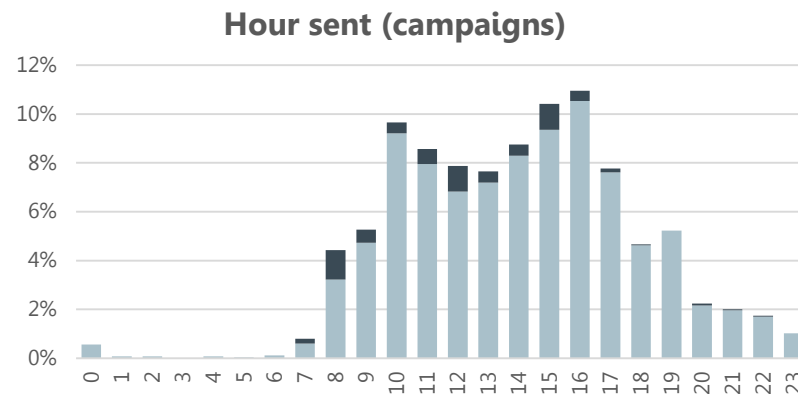
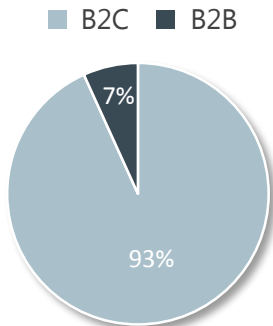
Technique adoption: High adoption of dynamic content

Mobile usage: Slightly below average

Adoption techniques	B2C	B2B
Dynamic content	44%	51%
Personalised subject line	1%	1%
Responsive design	89%	42%

Total	43,9%	6,9%	14,3%
B2C	44,3%	6,9%	14,0%
B2B	38,6%	7,6%	18,4%

% Mobile device	B2C	B2B
Opens	38%	23%
Clicks	30%	19%



* These numbers can be found in the appendix

Industry and producers: Average ratios in spite of very small campaign size



The industry and producers industry includes 12 million emails sent in 2.597 campaigns.

Ratios: Average
 Average campaign size*: Very small with 5k compared to 33k on average
 Campaign frequency*: Low with 30 campaigns compared to 58 on average
 Timing: Strong focus on office hours
 Technique adoption: The adoption of the techniques is low compared to the average in B2C campaigns. The B2B market adopts techniques much better with the exception of responsive design

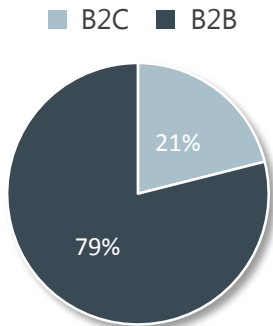
Mobile usage: Low



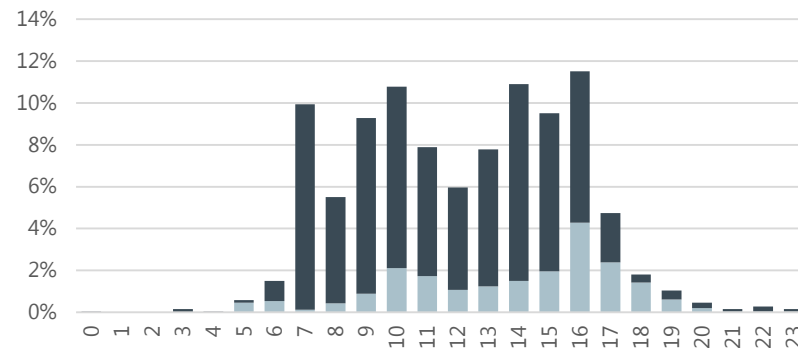
	Total	B2C	B2B
Total	36,5%	6,8%	17,5%
B2C	36,3%	7,2%	19,1%
B2B	36,6%	6,6%	17,1%

Adoption techniques	B2C	B2B
Dynamic content	32%	39%
Personalised subject line	1%	7%
Responsive design	57%	41%

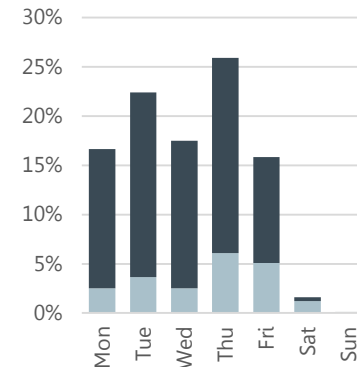
% Mobile device	B2C	B2B
Opens	23%	18%
Clicks	21%	16%



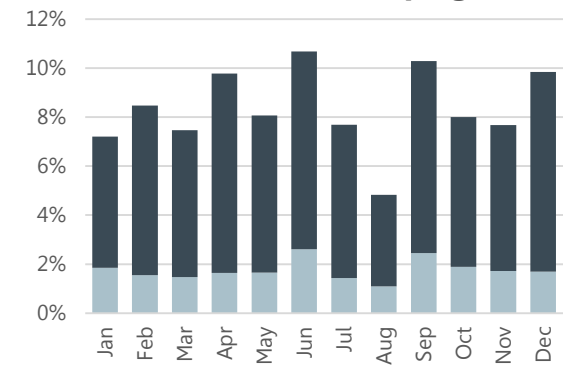
Hour sent (campaigns)



Day sent (campaigns)



Month sent (campaigns)



* These numbers can be found in the appendix

Charity: Very high ratios and high adoption of techniques



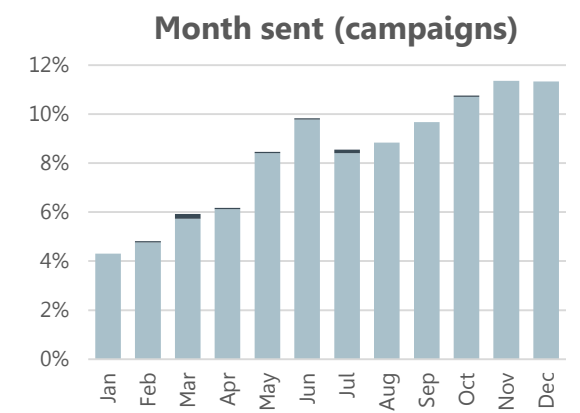
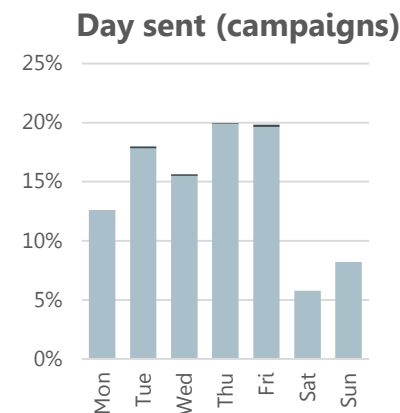
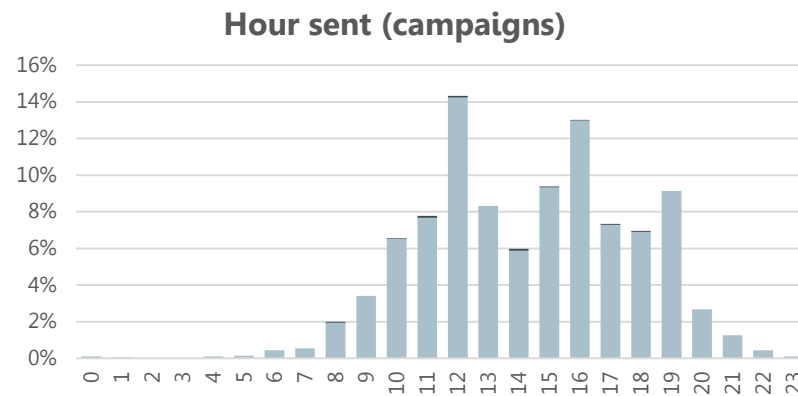
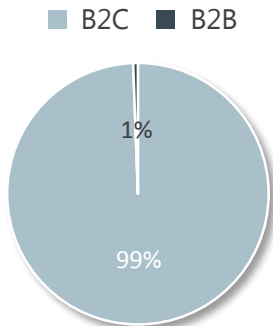
The charity includes 81 million emails sent in 2.058 campaigns.

Ratios: Very high in spite of above average campaign size and campaign frequency
 Average campaign size*: Slightly above average
 Campaign frequency*: Above average
 Timing: Focus at the end of the year
 Technique adoption: Very high for all techniques
 Mobile usage: Average

Adoption techniques	B2C	B2B
Dynamic content	69%	8%
Personalised subject line	36%	0%
Responsive design	96%	88%

% Mobile device	B2C	B2B
Opens	44%	27%
Clicks	38%	28%

Total	47,2%	16,6%	27,2%
B2C	47,3%	16,7%	27,2%
B2B	32,0%	8,8%	24,1%



* These numbers can be found in the appendix

Hotel and catering: Low ratios and a large average campaign size



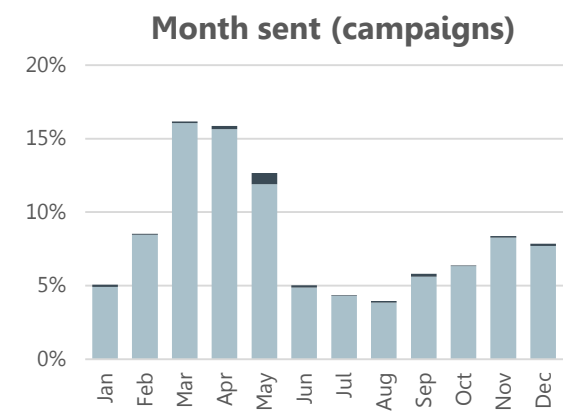
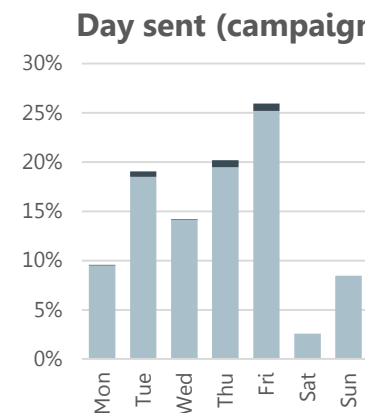
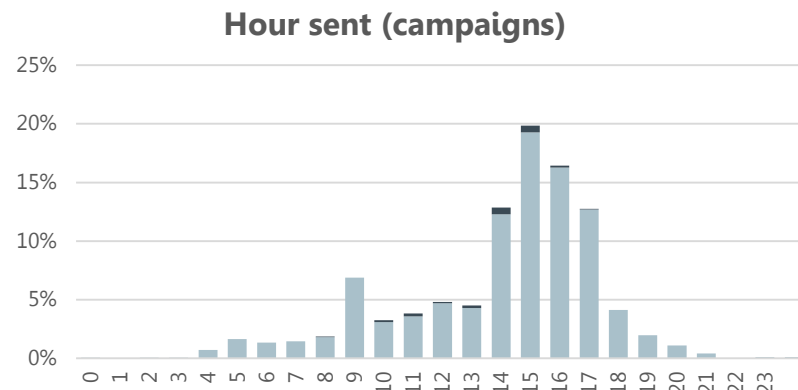
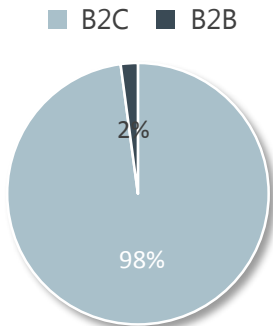
The hotel and catering industry includes 145 million emails sent in 1.936 campaigns.

Ratios: Very low
 Average campaign size*: High with 75k compared to 33k on average
 Campaign frequency*: Below average
 Timing: Strong focus on the afternoon between 14:00 and 18:00 and spring months
 March, April and May
 Technique adoption: The adoption of dynamic content is high and the other techniques low
 Mobile usage: Average

Adoption techniques	B2C	B2B
Dynamic content	84%	39%
Personalised subject line	0%	0%
Responsive design	28%	50%

% Mobile device	B2C	B2B
Opens	47%	18%
Clicks	36%	18%

Total	26,1%	3,2%	15,9%
B2C	26,0%	3,2%	15,9%
B2B	31,7%	4,1%	13,9%



* These numbers can be found in the appendix

ICT and internet: Low ratios in spite of small campaign size



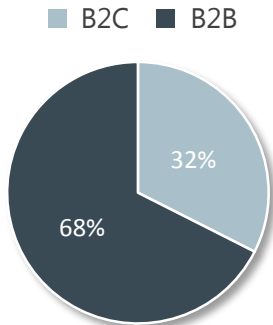
The ICT and internet industry includes 31 million emails sent in 1.849 campaigns.

Ratios: Low for all ratios especially B2C campaigns
 Average campaign size*: Low with 17k compared to 33k on average
 Campaign frequency*: Low with 23 campaigns compared to 58 on average
 Timing: Strong focus on office hours
 Technique adoption: The adoption of dynamic content is low but the other techniques are adopted more than on average
 Mobile usage: Below average

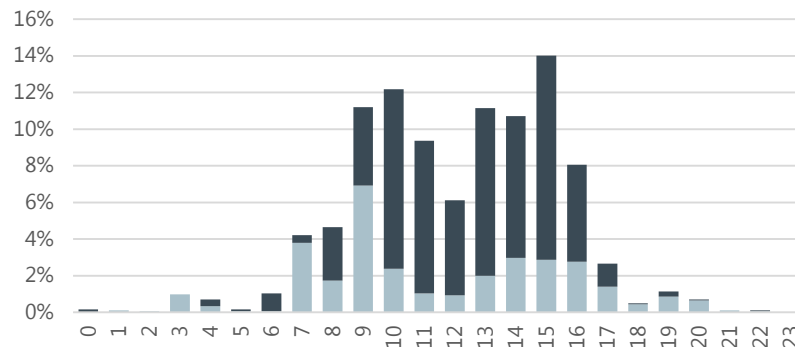
Adoption techniques	B2C	B2B
Dynamic content	16%	12%
Personalised subject line	10%	6%
Responsive design	74%	58%

% Mobile device	B2C	B2B
Opens	38%	19%
Clicks	35%	18%

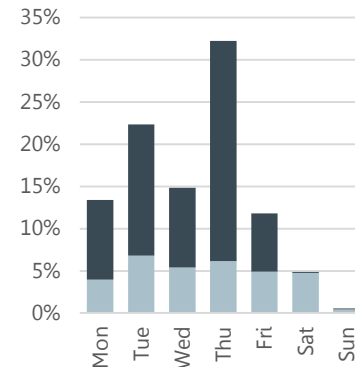
Total	30,5%	4,7%	13,3%
B2C	23,4%	2,3%	8,7%
B2B	34,0%	5,9%	15,6%



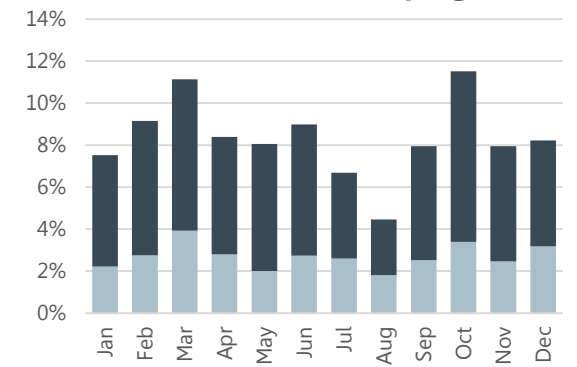
Hour sent (campaigns)



Day sent (campaigns)



Month sent (campaigns)



* These numbers can be found in the appendix




Automotive: High ratios and techniques well adopted

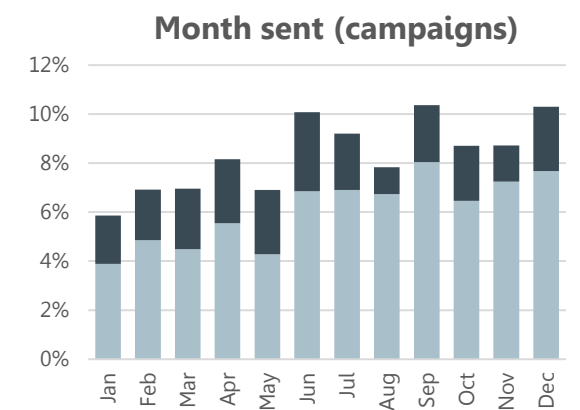
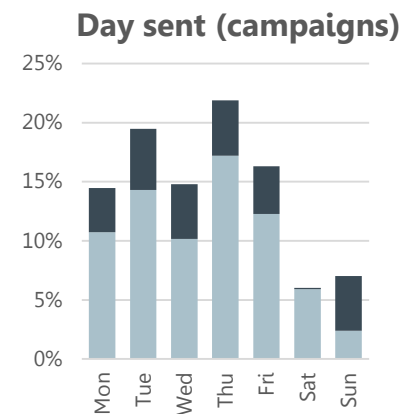
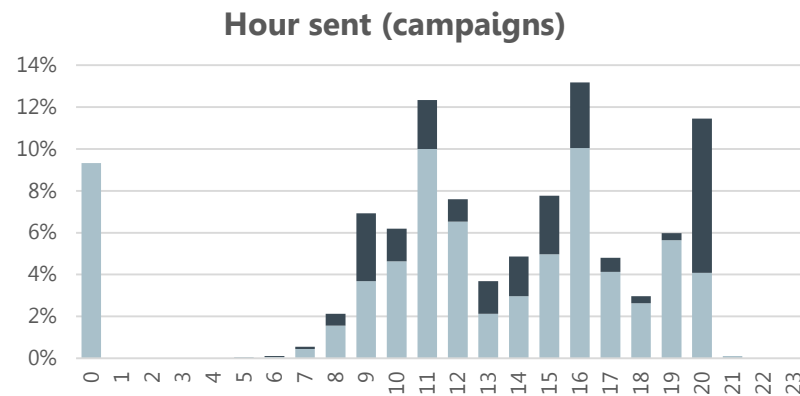
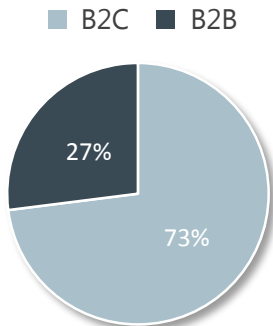
i The automotive industry includes 89 million emails sent in 1.791 campaigns.

Ratios: High for all ratios
 Average campaign size*: Large with 50k compared to 33k on average
 Campaign frequency*: Average
 Timing: High peak at 11:00, 16:00 and 20:00
 Technique adoption: High for all techniques
 Mobile usage: Below average

Adoption techniques	B2C	B2B
Dynamic content	75%	38%
Personalised subject line	9%	29%
Responsive design	94%	63%

% Mobile device	B2C	B2B
Opens	43%	28%
Clicks	37%	25%

			
Total	47,0%	11,2%	22,1%
B2C	49,0%	12,2%	23,2%
B2B	41,5%	8,6%	19,3%



* These numbers can be found in the appendix




Government: High ratios with a small average campaign size, low mobile usage

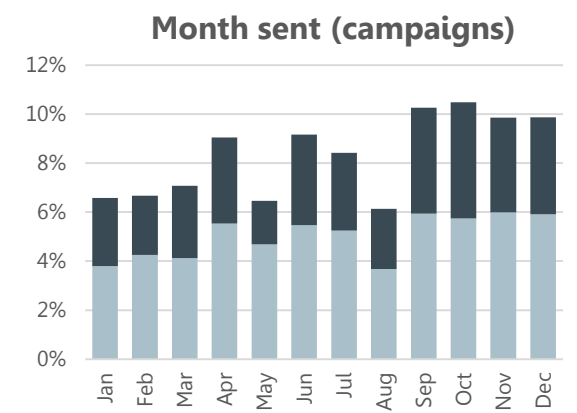
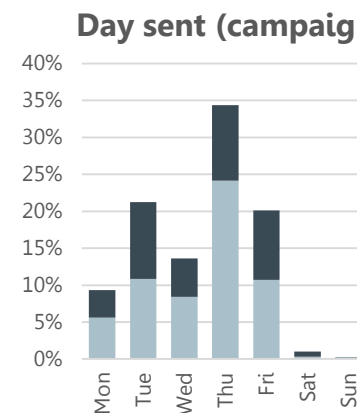
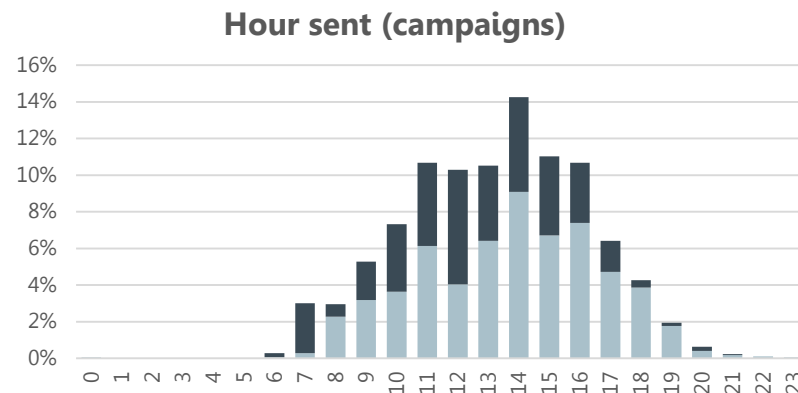
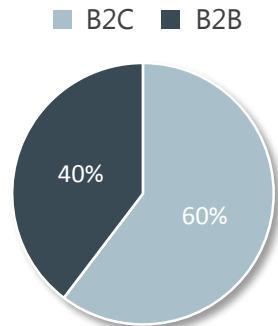
i The government industry includes 12 million emails sent in 1.760 campaigns.

Ratios: High for all ratios
 Average campaign size*: Small with 7k compared to 33k on average
 Campaign frequency*: Below average
 Timing: Strong focus on office hours
 Technique adoption: Low adoption except for dynamic content in B2C campaigns
 Mobile usage: Low

Adoption techniques	B2C	B2B
Dynamic content	63%	1%
Personalised subject line	0%	1%
Responsive design	68%	45%

% Mobile device	B2C	B2B
Opens	30%	22%
Clicks	23%	16%

			
Total	46,8%	11,3%	23,2%
B2C	50,8%	12,8%	24,7%
B2B	40,6%	9,2%	21,0%



* These numbers can be found in the appendix

Wholesale: Ratios are below average while the average campaign size is small



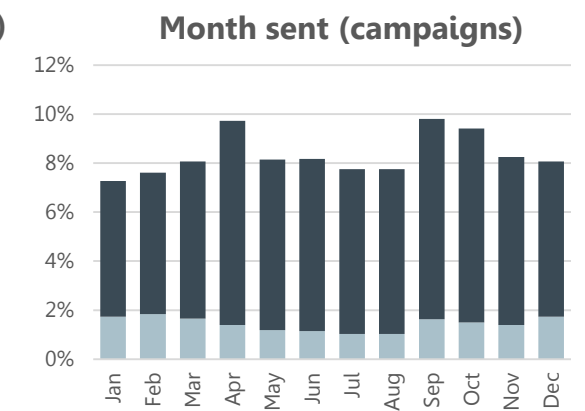
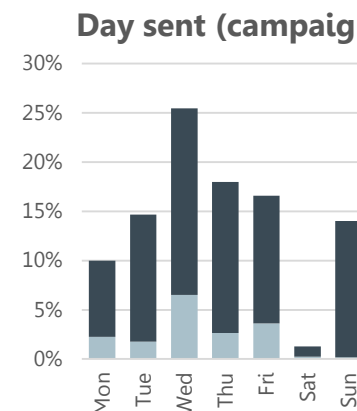
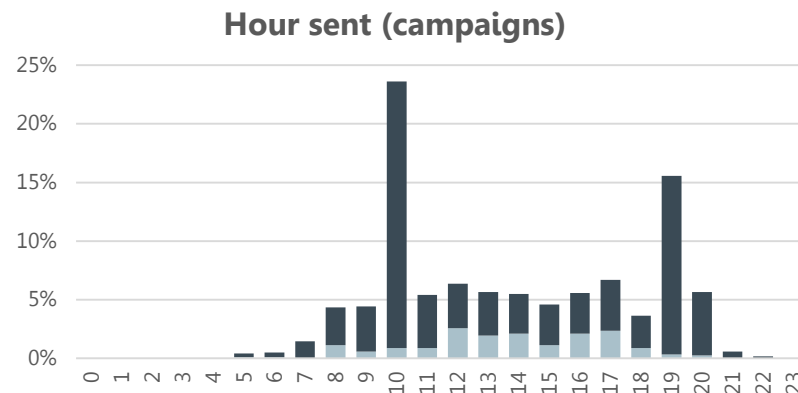
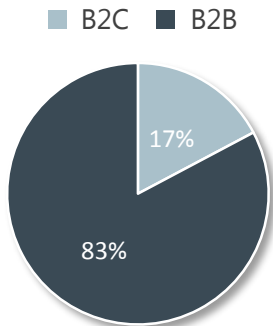
The wholesale industry includes 15 million emails sent in 1.241 campaigns.

- Ratios: Below average for all ratios
- Average campaign size*: Small with 12k compared to 33k on average
- Campaign frequency*: Average
- Timing: High peak between 10:00 and 11:00 and 19:00 and 20:00 and a surprisingly active Sunday
- Technique adoption: The adoption of dynamic content is low in B2C campaigns and high in B2B campaigns. Responsive design adoption is high, especially in B2B campaigns
- Mobile usage: Below average

Adoption techniques	B2C	B2B
Dynamic content	4%	76%
Personalised subject line	2%	0%
Responsive design	77%	87%

% Mobile device	B2C	B2B
Opens	40%	36%
Clicks	38%	29%

Total	30,9%	4,5%	13,5%
B2C	38,9%	5,7%	13,7%
B2B	29,2%	4,3%	13,5%



* These numbers can be found in the appendix

Agriculture: Very low adoption of techniques



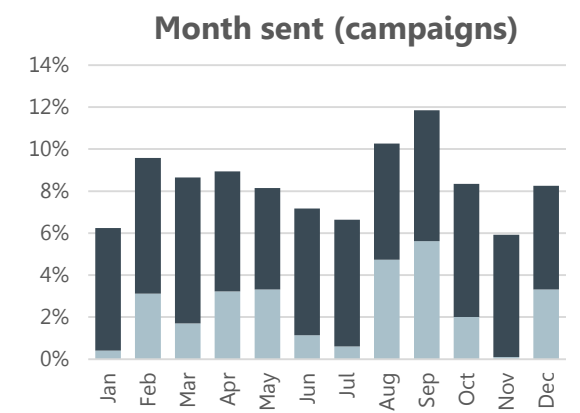
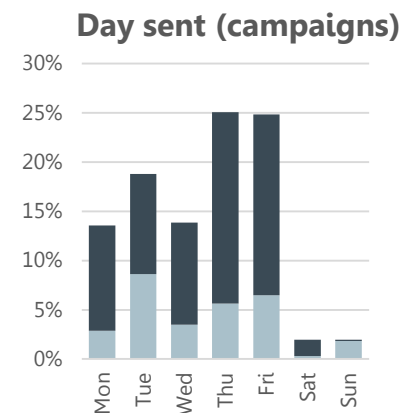
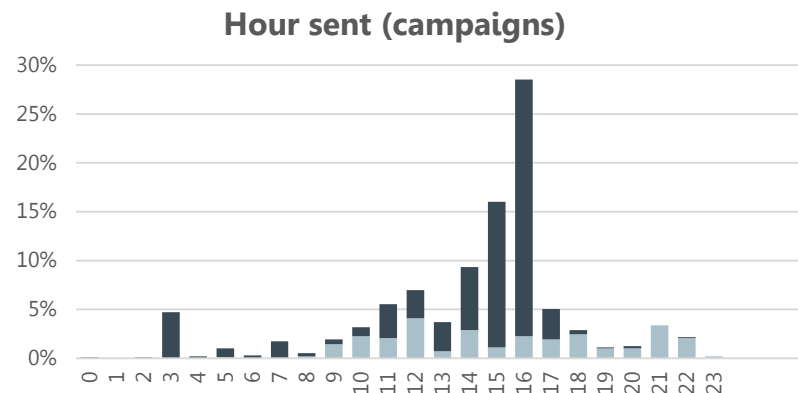
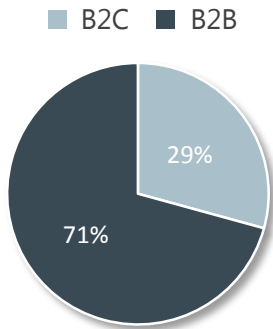
The agriculture industry includes 5 million emails sent in 974 campaigns.

Ratios: Average for all ratios
 Average campaign size*: Small with 5k compared to 33k on average
 Campaign frequency*: Above average
 Timing: Strong focus on office hours, especially between 14:00 and 16:00
 Technique adoption: Very low
 Mobile usage: Below average except mobile opens in B2C campaigns which is far above average

Adoption techniques	B2C	B2B
Dynamic content	18%	28%
Personalised subject line	0%	0%
Responsive design	34%	42%

% Mobile device	B2C	B2B
Opens	62%	24%
Clicks	21%	14%

Total	34,1%	7,2%	18,2%
B2C	23,4%	1,0%	3,8%
B2B	38,6%	9,7%	24,2%



* These numbers can be found in the appendix

Transportation and logistics: COR for B2C campaign above average and high adoption of techniques



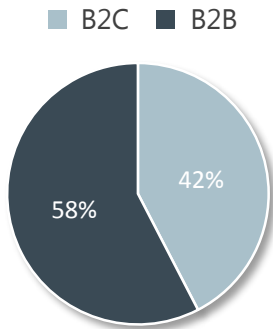
In the transportation and logistics industry 4 million emails are sent in 684 campaigns.

Ratios: High COR for B2C campaigns
 Average campaign size*: Small with 6k compared to 33k on average
 Campaign frequency*: Low with 24 campaigns compared to 58 on average
 Timing: Strong focus on office hours
 Technique adoption: High adoption of dynamic content and responsive design
 Mobile usage: Below average

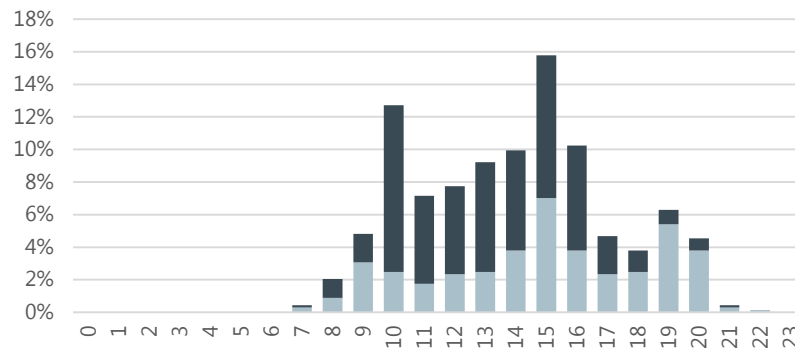
Adoption techniques	B2C	B2B
Dynamic content	64%	25%
Personalised subject line	2%	6%
Responsive design	80%	80%

% Mobile device	B2C	B2B
Opens	36%	19%
Clicks	35%	16%

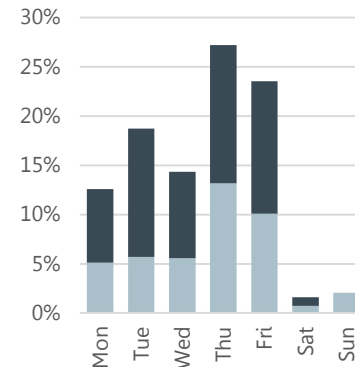
Total	39,6%	7,2%	16,4%
B2C	45,7%	7,1%	14,6%
B2B	35,2%	7,2%	17,7%



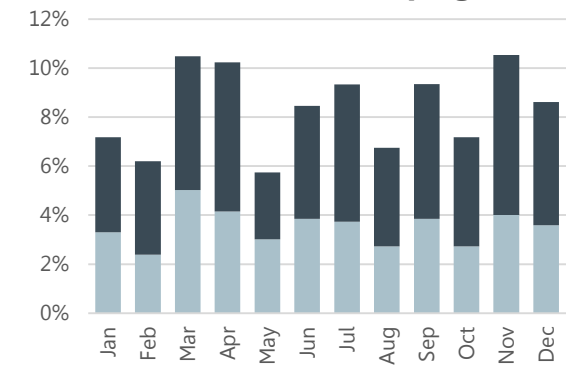
Hour sent (campaigns)



Day sent (campaigns)



Month sent (campaigns)



* These numbers can be found in the appendix

Fast moving consumer goods: Ratios above average with a small average campaign size



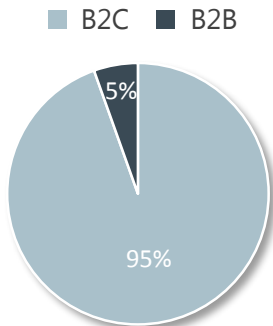
In the fast moving consumer goods industry 7 million emails are sent in 422 campaigns.

Ratios: Above average
 Average campaign size*: Small with 6k compared to 33k on average
 Campaign frequency*: Low with 28 campaigns compared to 58 on average
 Timing: Strong focus on office hours, especially the afternoon between 14:00 and 19:00
 Technique adoption: High adoption of dynamic content
 Mobile usage: Slightly below average

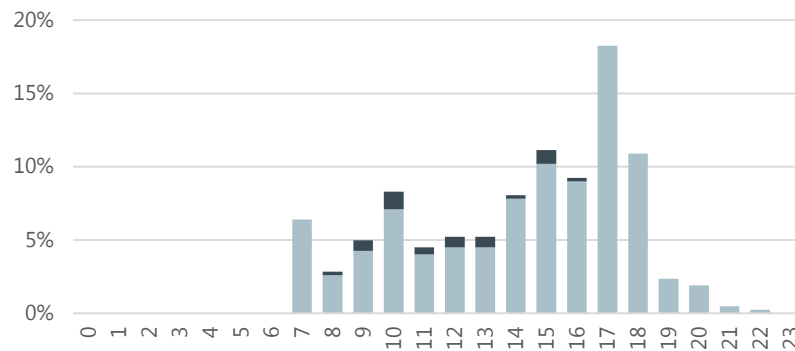
Adoption techniques	B2C	B2B
Dynamic content	73%	0%
Personalised subject line	2%	0%
Responsive design	61%	7%

% Mobile device	B2C	B2B
Opens	41%	18%
Clicks	41%	21%

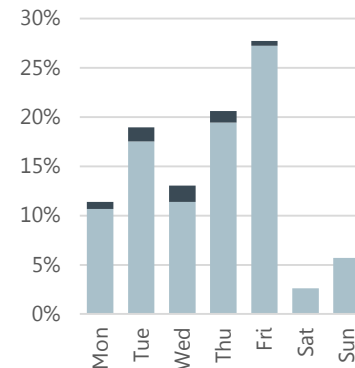
Total	38,1%	8,6%	20,3%
B2C	37,0%	7,8%	19,3%
B2B	55,4%	23,2%	38,0%



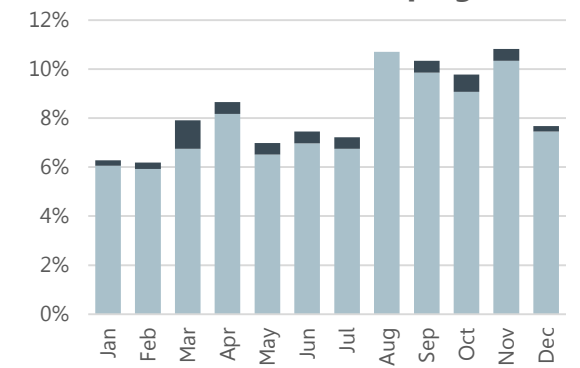
Hour sent (campaigns)



Day sent (campaigns)



Month sent (campaigns)



* These numbers can be found in the appendix

- General information
- ...
- Government
- Wholesale
- Agriculture
- Logistics
- FMCG**
- Overall

- Overall ratios
- Size and Frequency
- Timing
- Techniques
- Mobile
- Industries**
- Reading guide
- Appendix

Overall (1/2): Factsheet



This slide is to be used as a reference for a specific Industry. It contains the ratios of the overall benchmark.

General information

...

Government

Wholesale

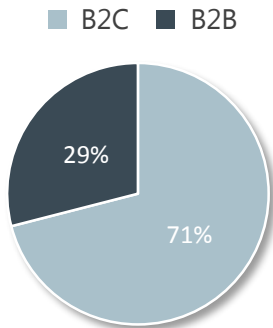
Agriculture

Logistics

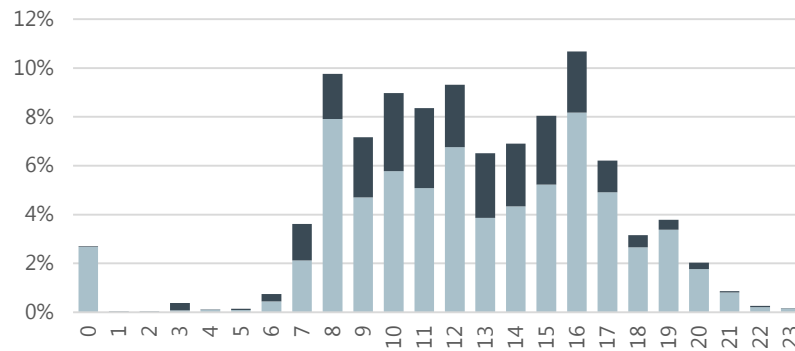
FMCG

Overall

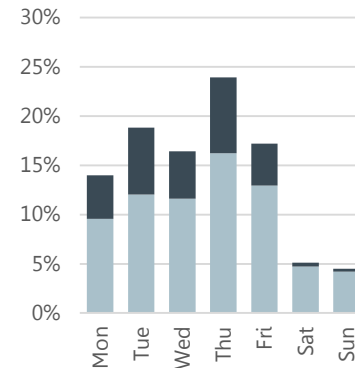
Total	35,2%	7,0%	17,5%
B2C	34,8%	6,8%	16,9%
B2B	36,3%	7,4%	18,9%



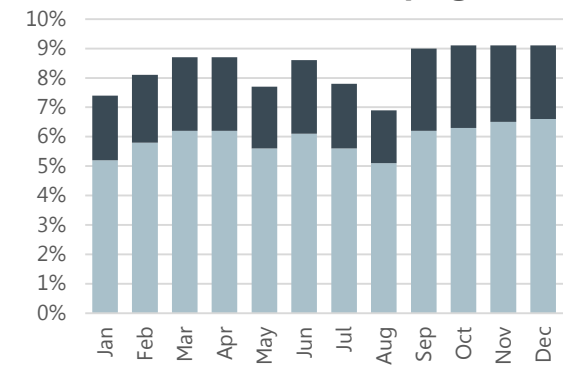
Hour sent (campaigns)



Day sent (campaigns)



Month sent (campaigns)



Adoption techniques	B2C	B2B
Dynamic content	41%	18%
Personalised subject line	5%	3%
Responsive design	72%	56%

% Mobile device	B2C	B2B
Opens	46%	31%
Clicks	41%	20%

* These numbers can be found in the appendix

Overall (2/2): Factsheet



This slide is to be used as a reference for a specific Industry. It contains the ratios of the overall benchmark.

General information

...

Government

Wholesale

Agriculture

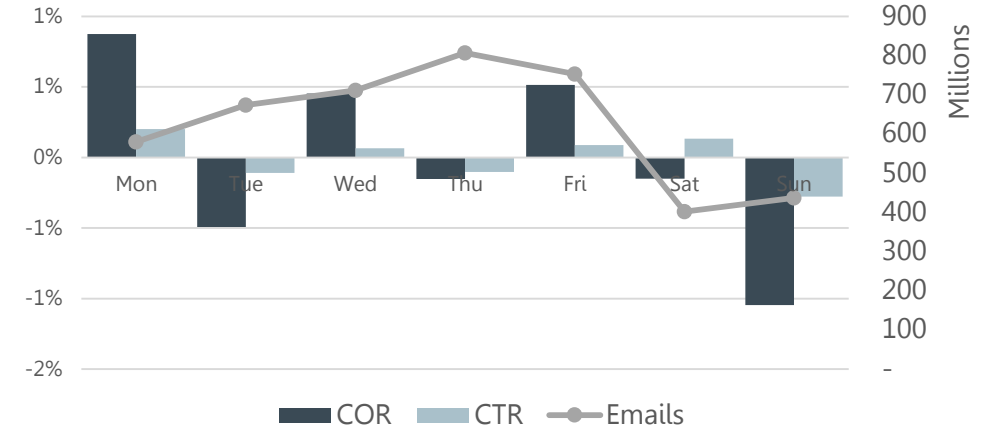
Logistics

FMCG

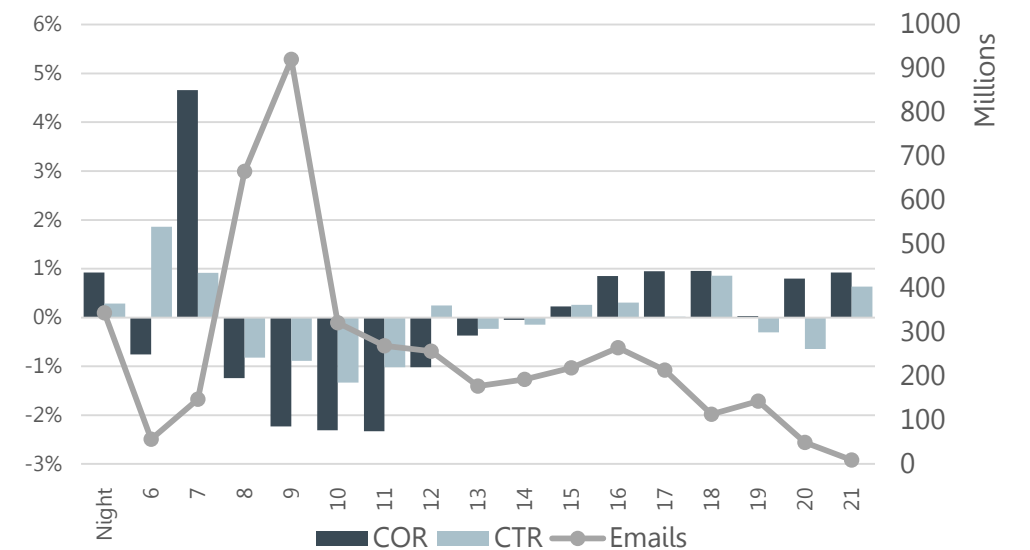
Overall

Technique (% known in data)	COR	CTR
Dynamic content (51%)	+ 4.8%	+ 1.82%
Personalised subject line (100%)	+ 1.8%	+ 0.87%
Responsive design (74%)	- 0.97%	No effect

Impact day vs. average rates



Impact hour vs. average rates



Thank you for reading this benchmark. If you have any comments, please contact the DDMA

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The Data Driven Marketing Association (DDMA) is the cross media trade organisation for the data driven marketing industry in the Netherlands. This is one of the fast growing sectors of industry in Western Europe.

DDMA represents the interests of users, service providers and media/carriers both in the Netherlands and at a European level. The organisation also acts as a communication and knowledge platform for professionals working in data driven marketing.

ADDITIONAL INFORMATION

This section contains the reading guide and the appendix. The reading guide is divided into several parts which will guide the reader through the report. It considers definitions, terminology and the technological and methodological background. The appendix contains additional information that has not been presented in the report. It considers a historic overview of the ratios, industry ratios and a data description.

Ratios



Confirmed Open Rate (COR)

Number of unique people who opened an email divided by the total number of successfully delivered emails.



Click Through Rate (CTR)

Number of unique people who clicked on the link in the email divided by the total number of successfully delivered emails.



Click to Open Rate (CTO)

Number of unique people who clicked on the link in the email divided by the total number of unique confirmed opens.



Acceptance Rate (AR)

Number of emails that has been successfully delivered divided by the number of sent emails.



Soft Bounce Rate (SBR)

Temporary rejected emails divided by the total number of sent emails.



Hard Bounce Rate (HBR)

Permanently rejected emails divided by the total number of sent emails.

Techniques

Dynamic content

Refers to variations in the content of emails based on a set of predetermined rules. These rules usually refer to personal characteristics or a profile of the email receiver, for example behaviour, preferences or purchase patterns. Dynamic content thus results in the display of a specific variation of an email that is considered most relevant for a receiver.

Personalisation subject line

Refers to variations/ personalisation in the 'headline' or subject line of an email based on a set of predetermined rules. These rules usually refer to personal characteristics or a profile of the email receiver.

Responsive design

Approach where the appearance of an email is dynamically changed, depending on the screen size, opening system and orientation of the device being used to view it.

Terminology



Night vs. day

The regression analysis that specifies the impact of each hour in the day on which emails are sent, does not show all “nightly” hours. The night hours were grouped from 22:00 till 06:00 in the morning and are mentioned with the term *night*. The reason for grouping the hours together is that the lower email activity in these hours do not result in significant results. The only real activity in this timeslot is often related to batch sending around midnight.

No effect

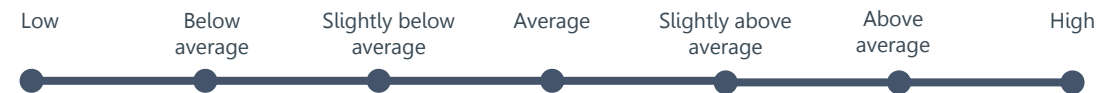
The regression analysis does not always show a significant output, in such cases the term *no effect* is applied.

Mobile device

The term mobile device represents the use of mobile phones and tablets. This is related to the fact that the distinction between mobile phone and tablets is not provided for all campaigns.

Scale

When comparisons between ratios are made, for example on the industry specific pages, several terms are used. These terms vary from low to high and are scaled as stated in the image below.



Rationale of choices



Throughout the report certain choices were made. In this section we provide the rationale for these choices.

Campaign level vs. email level

1. **Email level:** All individual emails are taken into consideration. For the COR this implies that all opened emails are divided by the total number of sent emails.
2. **Campaign level:** All individual campaigns are taken into account. For the COR this implies that a weighted average is taken over the COR per campaign. This means that all campaigns are weighed equally.

In this report we focus on option 2 as we did in previous years, because:

1. We aim to provide insight into the performance and effectiveness of campaigns to be used as a benchmark for campaign performance. For this purpose we argue that option 2 will give the best insights considering the campaign is the measuring unit.
2. The first option has the negative side effect of not taking into account the size of the campaign. This way larger campaigns, which can contain a considerably large amount of emails, will dominate in the calculation of the ratios. E.g. in the benchmark the largest campaign would have more influence on the overall ratio's than the 30:000 smallest campaigns.

Scoping of research data

- Campaigns which contain at least 500 email addresses.
- Transactional emails, service emails and event driven emails are excluded.
- Dutch emails (Dutch senders and Dutch customers).
- Emails sent from January 2015 until December 2015.
- Data from 7 ESPs (not all ESP clients made their data available for the Benchmark and emails abroad are not included in the dataset).

Timing

The data includes the time that an email was sent and whether or not an email is opened/clicked upon. It does not include time when an email is opened or clicked upon. So only conclusions can be drawn whether the time a mail is sent results in a higher or lower opening/clicking rate.

Regression data



Descriptive vs. predictive

The descriptive method is applied to describe high level information. E.g. "What is the average COR of an industry?". The predictive method is used to isolate the impact of one variable. E.g. "What is the impact of the campaign size on the COR?". The descriptive method does not adjust for the effect of specific variables, whereas the predictive method is based on a regression analysis and can isolate each variable individually. This means, that specific properties of a campaign can be taken into consideration.

Regression analysis

A regression analysis is a statistical procedure that allows us to analyse relationships between variables. It provides insight into individual variables by analysing its behaviour while keeping other variables constant. In technical terms a regression analysis makes use of a *dependent* variable and one or more *independent* variables. For example, suppose we want to investigate whether the COR is influenced by the campaign size. A regression model can be used with the COR as the *dependent* variable and the campaign size as the *independent* variable. The other variables are kept constant, such that the effect of other variables is neutralised. This way we are able to analyse specifically the effect of the campaign size on the COR.

Regression vs. no regression

A regression analysis requires the inclusion of a large data set. With smaller sets of data the regression analysis becomes less accurate. For this reason not all industry pages include information provided by the regression analysis. The threshold that was applied to determine whether or not a regression analysis would be included, was 7.500 campaigns. Hence, industries with a smaller amount of campaigns will not have an industry specific regression analysis.

Assumptions for regression analysis

A regression analysis is usually performed on data that is characterised by a normal distribution. Considering the data of the benchmark is categorical a normal distribution is assumed.

Examples



Example 1

Using the descriptive method, B2B campaigns has an average COR of 36,3% and B2C has an average COR of 34,8%. Based on this outcome, we conclude that B2B sends better quality campaigns than B2C. In reality several factors can explain this difference. For instance, the size of the campaigns could be of influence. The average campaign size of B2B-campaigns is 7:000, whereas for B2C this is 33:000. Later we show that the data indicate that a higher campaign size has a strong negative impact on the COR. Using the predictive method the impact of one variable on the COR, in this case B2B or B2C, is corrected for other variables, such as campaign size. The predictive method predicts a COR of 33,3% for B2B and 36% for B2C. This means that a campaign with similar properties performs better in the B2C market compared to the B2B market. This is opposite to what we concluded with the descriptive method, because we corrected for campaign size and all other campaign characteristics.

	Descriptive COR	Predictive COR
Total	35,2%	35,2%
B2C	34,8%	36,0%
B2B	36,3%	33,3%

Example 2

Using the descriptive method the *energy and natural resources* industry has a COR of 59% and the *retail (eCommerce only)* industry has a COR of 19%. We conclude that the *energy and natural resources* industry performs better compared to the *retail (eCommerce only)* industry. Using the predictive method we can analyse whether individual factors could explain this difference. Similar to the previous example, we found that the campaign size is influential. The *retail (eCommerce only)* industry sends approximately 83:000 emails on average compared to approximately 7:000 emails in the *energy and natural resources* industry. Using the predictive method the *energy and natural resources* industry has an average COR of 57% and *retail (eCommerce only)* a COR of 32%. The difference is now significantly smaller.

How to read the industry pages



In the following section a detailed overview will be provided for each of the industries. Each industry has either one or two pages to describe the results. The first page is based on output of the descriptive method (Figure 1). The second page, impact, is based on output of the predictive method (Figure 2). The second page is not available for each of the industries, because not all industries meet the minimum requirement for the regression analysis (6.000 campaigns).

To give an idea of how to read these pages we have provided some key points for each of the pages. For information on the regression analysis we refer to the reading guide.

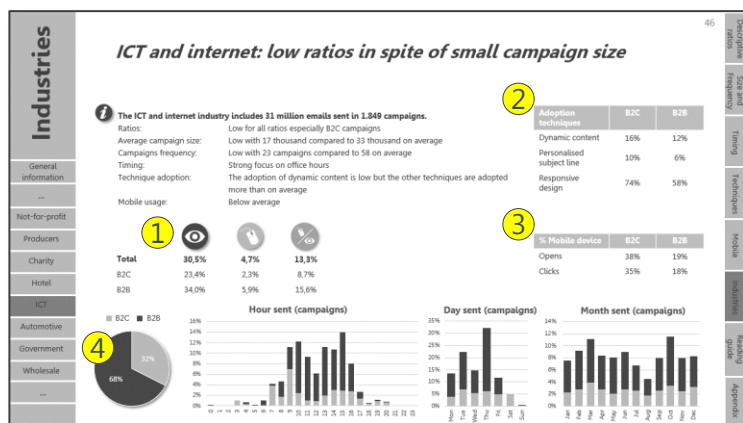


Figure 1. This page contains general information regarding the industry.

- The different ratios are displayed with a segmentation to B2B/B2C. Due to considerably small differences we chose to exclude the segmentation for the AR, SBR and HBR.
- The adoption of email techniques in the industry is shown for the B2B/B2C segmentation.
- The mobile usage in the industry is shown for the B2B/B2C segmentation.
- The graphs at the bottom show the distribution of campaigns sent during the day, month and hour and show the segmentation for B2B/B2C.

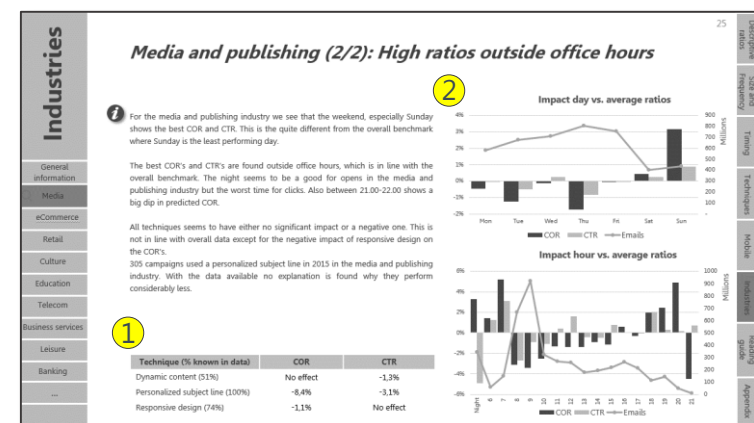


Figure 2. This page contains information based on the predictive method.

- The graphs on this page show the impact of a variable on the ratios, compared to the average ratio of the industry. The descriptive method results in a COR of xx% (page 1). The graph shows the deviation of the average for certain days or hours. If the impact is positive, this means that the COR is xx% higher than the average.
- The table shows the deviation from the average for specific email techniques. The interpretation of these values is similar to the above explanation.

Historic benchmark data (2012 - 2016)

Ratios	Benchmark 2016	Benchmark 2015	Benchmark 2014	Benchmark 2013	Benchmark 2012
COR	35,2%	35,5%	31,9%	32,9%	34,0%
CTR	7,0%	7,3%	7,3%	7,9%	8,1%
CTO	17,5%	18,6%	20,6%	21,4%	22,1%
AR	99,1%	98,9%	98,7%	98,5%	98,5%
SBR	0,4%	0,5%	0,5%	0,6%	0,7%
HBR	0,6%	0,7%	0,8%	0,9%	1,0%

Historic data

Overall industry information

Ratios industries

Erratum

Overall industry information

Industry	Campaigns	Emails (millions)	Campaign size (avg.)	Companies	Frequency (avg.)
Media & Publishing	26.679 (15,5%)	413 (9,5%)	15.486	85	314
Retail (eCommerce only)	20.689 (12,1%)	1.727 (39,6%)	83.456	89	232
Retail (mixed)	13.011 (7,6%)	312 (7,1%)	23.954	271	48
Culture & Entertainment	10.423 (6,1%)	190 (4,3%)	18.181	105	99
Education	7.870 (4,6%)	60 (1,4%)	7.629	138	57
Telecom Services & Equipment	7.265 (4,2%)	201 (4,6%)	27.729	32	227
Business Services	6.021 (3,5%)	56 (1,3%)	9.326	181	33
Leisure	4.683 (2,7%)	119 (2,7%)	25.465	57	82
Banking & Insurance	4.128 (2,4%)	45 (1,0%)	10.784	100	41
Healthcare	3.692 (2,2%)	36 (0,8%)	9.824	74	50
Travel	3.527 (2,1%)	199 (4,6%)	56.537	48	73
Energy & Natural Resources	3.495 (2,0%)	25 (0,6%)	7.101	29	121
Construction Services	2.736 (1,6%)	26 (0,6%)	9.617	40	68
Not for profit	2.639 (1,5%)	30 (0,7%)	11.314	38	69
Industry & Producers	2.597 (1,5%)	12 (0,3%)	4.758	87	30
Charity	2.058 (1,2%)	81 (1,9%)	39.468	27	76
Hotel & catering	1.936 (1,1%)	145 (3,3%)	74.887	41	47
ICT & Internet	1.849 (1,1%)	31 (0,7%)	16.618	79	23
Automotive	1.791 (1,0%)	89 (2,0%)	49.736	39	46
Government	1.760 (1,0%)	12 (0,3%)	6.669	40	44
Wholesale	1.241 (0,7%)	15 (0,3%)	12.167	18	69
Agriculture	974 (0,6%)	5 (0,1%)	4.880	10	97
Transportation & Logistics	684 (0,4%)	4 (0,1%)	6.290	28	24
Fast Moving Consumer Goods	422 (0,2%)	7 (0,2%)	16.618	15	28
Other / unknown	39.515(23,0%)	523 (12,0%)	13.227	1.334	30
	171.684	4.363	33.010	2.976	58

Ratios industries

Industry	COR	CTR	CTO	AR	SBR	HBR
Media & Publishing	34,6%	7,8%	20,7%	99,1%	0,5%	0,4%
Retail (eCommerce only)	19,3%	2,7%	12,2%	99,8%	0,1%	0,1%
Retail (mixed)	32,2%	4,8%	14,5%	99,5%	0,2%	0,3%
Culture & Entertainment	39,1%	6,1%	14,3%	99,2%	0,3%	0,5%
Education	38,7%	8,5%	20,1%	98,7%	0,4%	0,9%
Telecom Services & Equipment	48,0%	10,4%	19,5%	98,4%	0,5%	1,0%
Business Services	35,2%	7,3%	18,5%	98,1%	0,7%	1,2%
Leisure	41,5%	7,4%	15,7%	99,3%	0,2%	0,4%
Banking & Insurance	53,7%	11,8%	20,5%	98,9%	0,4%	0,7%
Healthcare	36,1%	7,5%	19,5%	99,3%	0,3%	0,4%
Travel	26,3%	3,6%	12,9%	99,5%	0,3%	0,3%
Energy & Natural Resources	59,0%	16,1%	24,9%	97,5%	0,5%	2,0%
Construction Services	45,4%	12,0%	23,5%	99,4%	0,2%	0,4%
Not for profit	43,9%	6,9%	14,3%	99,1%	0,4%	0,5%
Industry & Producers	36,5%	6,8%	17,5%	98,0%	0,9%	1,1%
Charity	47,2%	16,6%	27,2%	98,7%	0,5%	0,8%
Hotel & catering	26,1%	3,2%	15,9%	99,3%	0,2%	0,5%
ICT & Internet	30,5%	4,7%	13,3%	98,4%	0,6%	1,0%
Automotive	47,0%	11,2%	22,1%	98,4%	0,6%	1,0%
Government	46,8%	11,3%	23,2%	98,9%	0,4%	0,7%
Wholesale	30,9%	4,5%	13,5%	98,8%	0,7%	0,5%
Agriculture	34,1%	7,2%	18,2%	99,2%	0,3%	0,5%
Transportation & Logistics	39,6%	7,2%	16,4%	98,4%	0,6%	1,0%
Fast Moving Consumer Goods	38,1%	8,6%	20,3%	98,1%	0,7%	1,1%
Other / unknown	34,6%	6,6%	17,3%	99,1%	0,3%	0,6%
	35,2%	7,0%	17,4%	99,1%	0,4%	0,6%

Historic data

Overall industry information

Ratios industries

Erratum

Changes since the first version

Graph 'Impact day vs. average ratios' (p.13)

The number of emails sent per day have been corrected, therefore the grey line in the graph slightly shifted and the labels on the secondary axes changed. In addition, there have been some minor changes in the last paragraph on this page to anticipate on this shift. This was changed at June 29th 2016.

Text of 'Culture and entertainment industry (2/2)' (p.29)

There have been some minor changes in the last paragraph of this page. This was changed at June 16th 2016.

Text of 'Education industry (2/2)' (p.31)

There have been some minor changes in the last paragraph of this page. This was changed at June 16th 2016.

New DDMA logo (p.1, p.3)

This was changed at July 14th 2016.

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Size and Frequency

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Mobile

Industries

Reading guide

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