

A decorative graphic on the left side of the slide consisting of a grid of squares in various shades of purple and pink. The squares are arranged in a way that they appear to be floating or layered, with some squares overlapping others. The colors range from light pink to deep purple.

2018 Marketing Benchmark Report

Email and Mobile Metrics
for Smarter Marketing

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Introduction



Every day, marketers are using data to work smarter, make informed decisions, and set goals.

At IBM Watson Marketing, we believe deeply in this practice and have dedicated a large effort to provide some of this critical data to marketers.

The newest IBM Watson Marketing annual report of marketing benchmarks is bigger and better than ever with mobile marketing metrics data in addition to email marketing metrics.

This year's report includes traditional benchmark metrics such as email marketing open, click-through and unsubscribe rates, as well as email client and device data and engagement/read rates. New this year to the report are delivery and message frequency metrics for SMS and open and click-through rates for mobile push messages.

The Data: How to Interpret and Apply It

IBM Watson Marketing's 2018 benchmark study examines email and mobile marketing messages sent by several thousand brands in 2017, using a wide variety of measurements to establish benchmarks on customer engagement, delivery and subscriber churn.

Aim Higher

Many studies focus on “average” benchmarks. However, in today's hypercompetitive marketplace, “average” has become the new bottom. We encourage you to set your sights higher. Compare your company's results to those you find in the top and bottom quartiles (when provided) for each measurement as well as the mean and the median.

If you want to create a world-class email or mobile



marketing program, compare yourself to the best performers on the benchmarks that are most important to you instead of the average players.

Process vs. Output Metrics

This report examines “process” metrics which measure activity on messages. Understanding where your email and mobile programs stand on process metrics is one half of the benchmarking equation.

“Output” metrics, such as revenue, leads generated, cost savings, order size and number of downloads, measure how well your marketing campaigns

delivered against your individual company’s business goals. You need to both fully understand your marketing program’s performance.

Beyond Benchmarks

The benchmarks established in this study set a baseline you can use to determine where your email and mobile marketing program outperforms your peers and competitors and where you need to improve.

However, accurately gauging your marketing success also requires going beyond industry benchmarks to see whether your email, mobile or multichannel program met, exceeded or fell short of your own goals while adding value to the customer/prospect relationship and maximizing conversions and revenue.

Additional Resources

At the end of this report you’ll find a glossary explaining terms used in the study along with a list of resources on the [IBM Watson Marketing website](#) that can help you understand more about key issues affecting email and mobile marketing program performance. There’s also a list of industry category definitions you can use to determine which vertical group you fall into for the purposes of this study.

 Notifications

 Marketer













Marketer
Show me all marketing benchmarks.


Watson
I have found the following benchmarks.

Search for help

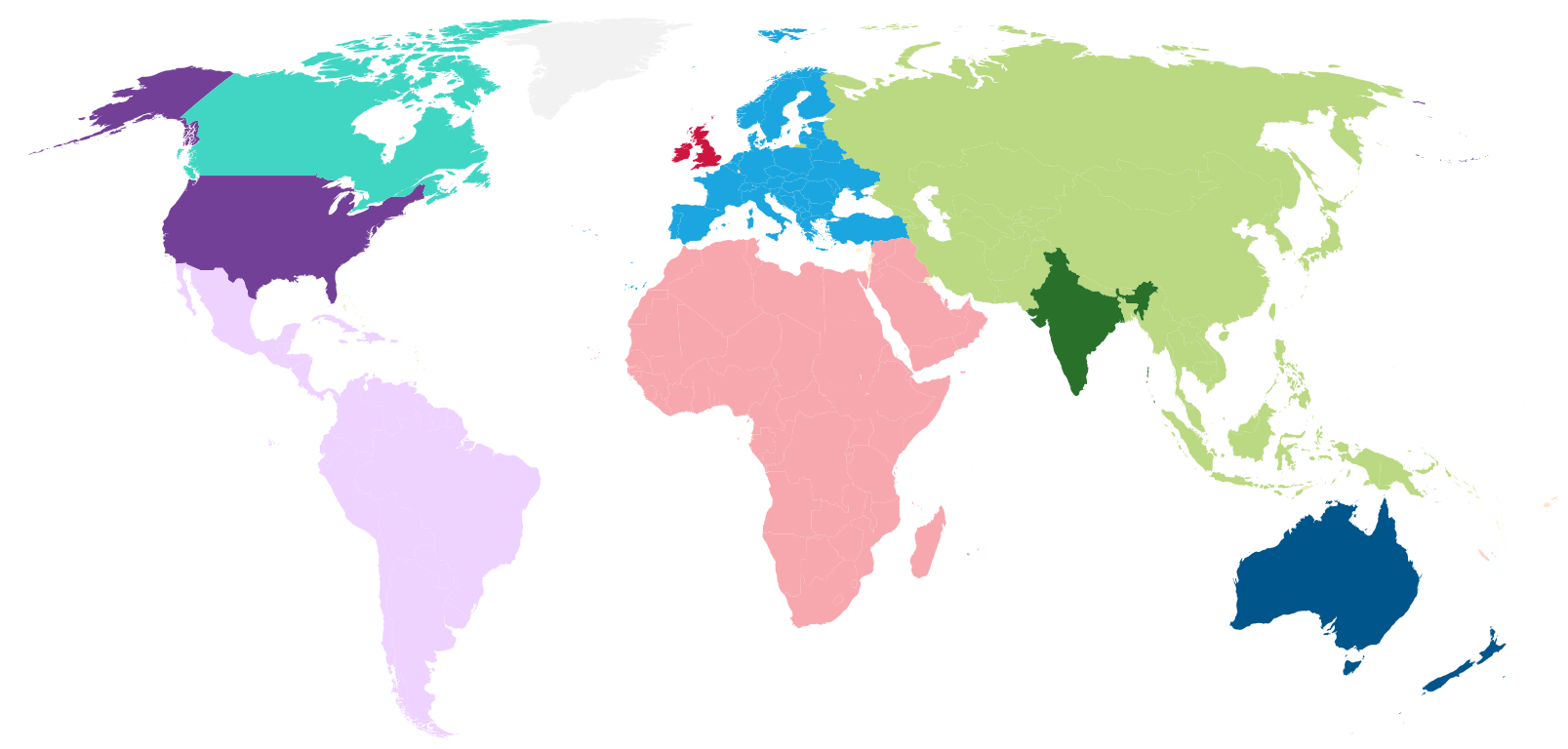
Benchmarks

- Industry: Automobile & Transportation
- Industry: Banks & Financial Services
- Industry: Computer Hardware & Telecommunications










and 27 more



Watson Assistant can be a useful tool to find and compare industry benchmarks. Follow along with these visual guides to see how easy it is to make smarter, AI-powered decisions.



Geography Legend

 United States	 United Kingdom & Ireland	 Asia Pacific
 Latin America & Caribbean	 Continental Europe	 India
 Canada	 Middle East & Africa	 Australia & New Zealand

Marketing Benchmarks
by Geography

For this study, researchers analyzed various metrics from brands based in more than 40 countries. Core email marketing and SMS metrics are reported as Overall and also by 9 geographic regions: United States, Canada, United Kingdom & Ireland, Australia & New Zealand, Middle East & Africa, Continental Europe, Latin America & Caribbean, Asia Pacific, and India.

Due to a different user base for the email client and device, and engagement/read rate metrics, these metrics are categorized into Overall and the following 7 countries/regions: United States; Canada; United Kingdom & Ireland; Asia Pacific, Australia & New Zealand; Middle East, India & Africa; Continental Europe; and Latin America & Caribbean.

Open Rates



7 Unique Open Rates
by Geography

8 Unique Open Rates
by Industry

9 Unique Open Rates
by Message Type

Overview

The open rate works best as an in-house benchmark to track over time because it can signal progress or problems with engagement. However, it is not a completely accurate metric because it doesn't capture all opens due to image blocking, connection speed and other factors.

In other words, track your open rate for comparison to your other messages over time, but don't use it as a sole measure of campaign success.

See how Watson improved open rates for these businesses:

Get more opens

Watson
Good day, Marketer, how can I help?

Marketer
Show me benchmark named Canada

Watson
I have found the following benchmark named "Canada".

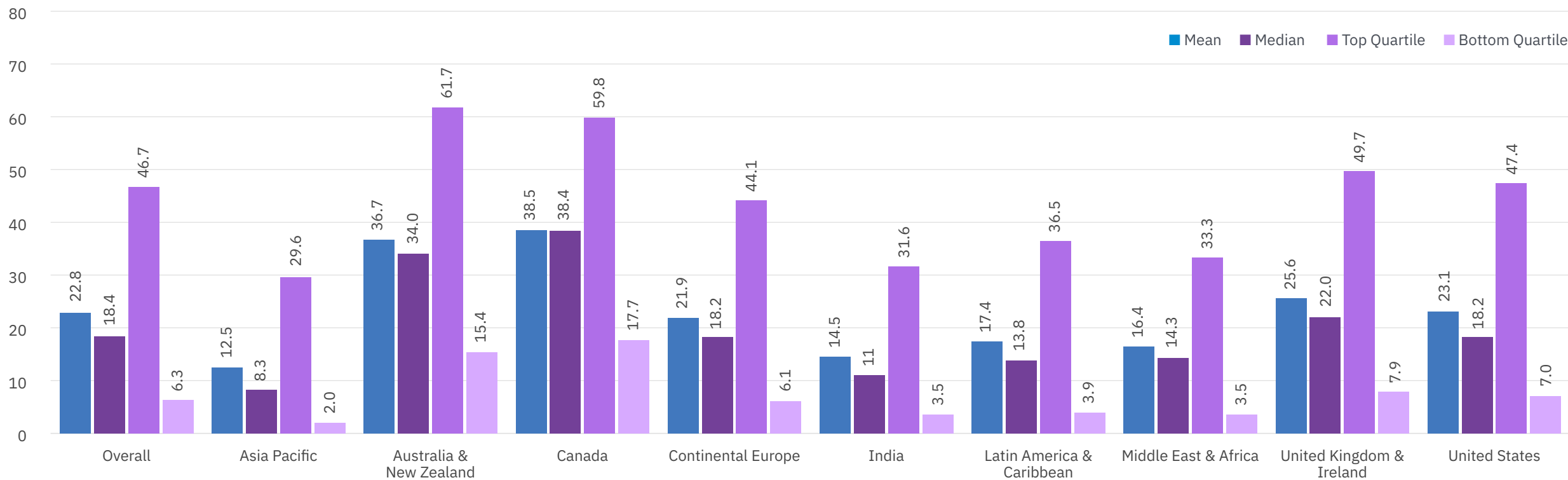
Search for help

Location: Canada

Metric	Mean	Median
CTOR	11.3%	7.90%
Click-Through Rate	4.80%	2.60%
Complaint Rate	0.01%	0%
Hard Bounce Rate	0.43%	0.02%
Open Rate	38.5%	38.4%
Unsubscribe Rate	0.12%	0.01%



Watson Marketing customers can easily find benchmark data by geography with the AI-powered Watson Assistant.



Observations

The overall mean and median unique open rates were 22.8% and 18.4% respectively. Canada (38.5% / 59.8%) and the Australia & New Zealand (36.7% / 61.7%) regions significantly outperformed all other regions for mean and top quartile unique open rates.

Canada has posted the highest mean/median open rates for several years, a likely result of companies preparing for the strict Canadian anti-spam rules (CASL) regulations that were announced in 2014 and went into effect in 2017.

As in past years, regions where digital marketing is perhaps less mature continue to see significantly lower mean and median open rates. Asia Pacific (12.5%), India (14.5%), Middle East & Africa (16.4%) and Latin America & Caribbean (17.4%) have the lowest mean unique open rates.



Open Rate (Unique)	Mean	Median	Top Quartile	Bottom Quartile
Automotive & Transportation	45.1	53.2	65.8	16.6
Banks & Financial Services	21.0	17.2	41.2	7.4
Computer Hardware & Telecommunications	30.0	24.3	60.3	9.7
Computer Software & Online Services	22.0	18.4	44.4	5.9
Consumer Products	21.5	16.9	46.6	4.6
Consumer Services	15.0	10.1	37.9	1.2
Corporate Services	18.8	15.0	39.9	4.5
Energy & Environmental	30.9	26.1	58.8	9.3
Food & Beverage	25.9	22.7	45.9	11.2
Hospitals, Healthcare & Biotech	24.7	21.2	47.9	7.6
Industrial Products	19.6	16.8	36.4	7.7
Insurance	31.4	27.6	57.5	11.2
Leisure, Sports & Recreation	19.1	15.5	39.5	4.7
Lodging, Travel Agencies & Services	25.5	20.3	53.0	7.3
Marketing & Advertising	24.2	19.9	48.8	6.3
Media & Publishing	18.9	16.1	36.0	6.7
Nonprofits, Associations & Government	28.4	26.1	49.0	11.8
Real Estate, Construction & Building Products	28.1	22.8	53.0	12.4
Retail & Ecommerce	23.4	18.5	47.8	7.2
Schools & Education	27.0	20.2	57.8	5.4

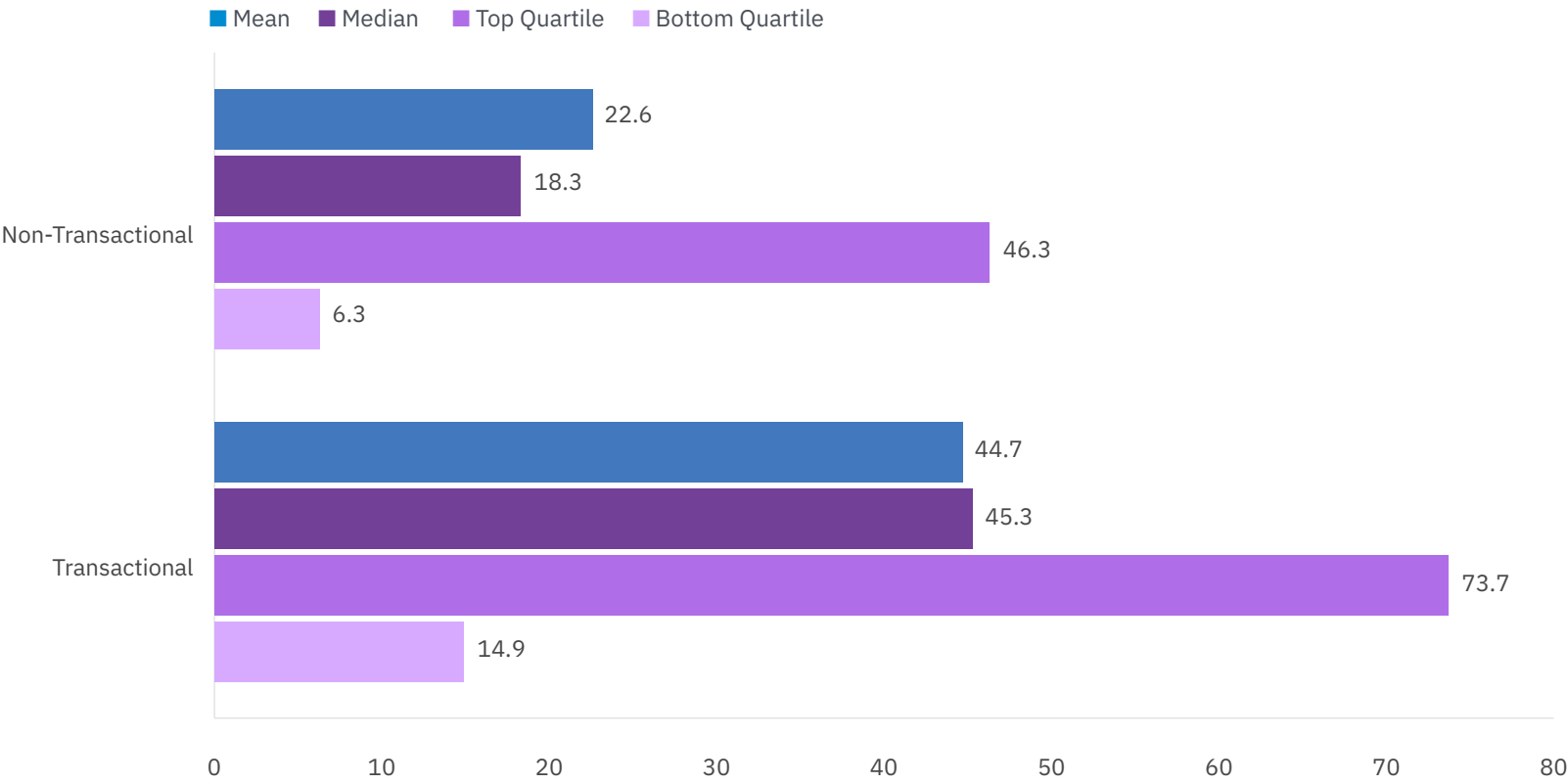
Consider This: Using mean benchmarks is a good starting point for measuring how you compare to peers. But, look at more than one industry and set your sights on achieving open rates that match the top performers in your and related industries. Most importantly, if you are underperforming, analyze the root causes such as subscriber acquisition sources and methods, frequency, design, content and value to the recipient as well as list hygiene.

Observations

Several verticals stood above the others with mean unique open rates at or higher than 30%: Automotive & Transportation (45.1%); Insurance (31.4%); Energy & Environmental (30.9%) and Computer Hardware & Telecommunications (30.0%).

Seven industries had top quartile unique open rates above 50%, and two, Automotive & Transportation (65.8%) and Computer Hardware & Telecommunications (60.3%), were above 60%.

The Consumer Services (15.0%), Corporate Services (18.8%) and Media & Publishing (18.9%) verticals have the lowest mean unique open rates. Surprisingly, Retail & Ecommerce was not one of the lowest performing industries this year with a 23.4% mean unique open rate. This might be a result of retailers adding more personalization and dynamic content to emails, but also increasing the amount of segmentation and targeting of offers rather than just increasing the frequency of sending messages in hopes of increasing revenue.



Observations

One of the greatest selling points for sending transactional messages is that recipients value them, opening them in greater percentages than any other message type. These statistics bear out that assertion, with transactional messages generating double-digit unique open rates among brands even in the bottom quartile.

In this study, transactional emails generated mean and median unique open rates of 44.7% and 45.3% respectively, and 73.7% in the top quartile.

Consider This: These emails are excellent vehicles for including cross-sell/upsell content. For example, an email receipt for a mountain bike purchase might include a promotion for a helmet or bike shoes based on like-minded purchases.

“Transactional messages generate double-digit unique open rates even among brands in the bottom quartile.”

Click-Through Rates



11 Click-Through Rates
by Geography

12 Click-Through Rates
by Industry

13 Click-Through Rates
by Message Type

14 Click-To-Open Rates
by Geography

15 Click-To-Open Rates
by Industry

16 Click-To-Open Rates
by Message Type

Overview

The click-through rate (CTR) is a process metric that measures recipient action on an email message. It’s a more revealing metric than the open rate but doesn’t substitute for output goals such as conversions, revenue or order value.

The related metric click-to-open rate (CTOR), sometimes known as the “effective rate,” sheds more light on engagement than a simple click rate because it measures click-through rates as a percentage of messages opened instead of simply messages delivered.

See how AI can help you work smarter:

Watch the video

Marketer
Show me benchmark named Consumer Products

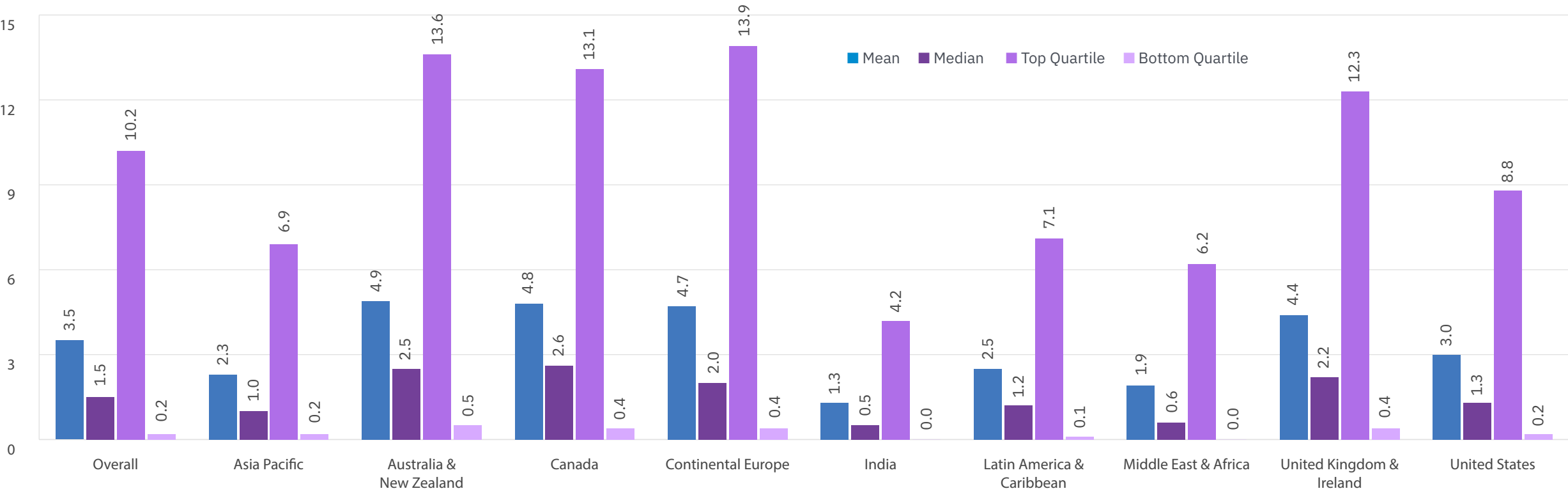
Watson
I have found the following benchmark named “Consumer Products”.

Search for help

Industry: Consumer Products		
Metric	Mean	Median
CTOR	22.3%	11.2%
Click-Through Rate	4.50%	1.60%
Complaint Rate	0.02%	0%
Hard Bounce	1.17%	0.03%
Open Rate	21.5%	16.9%
Unsubscribe Rate	0.11%	0.02%



Watson Marketing customers can easily find benchmark data by industry with the AI-powered Watson Assistant.



Observations

The top quartile click-through rate (CTR) of 10.2% is nearly 7 times higher than the overall median CTR of 1.5%, and nearly 3 times greater than the mean. In contrast, bottom-quartile performers mustered a CTR of only 0.2%.

Australia/New Zealand brands claimed the highest mean (4.9%) and second highest top quartile (13.6%). India, Middle East & Africa, and Asia Pacific had the lowest click-through rates.



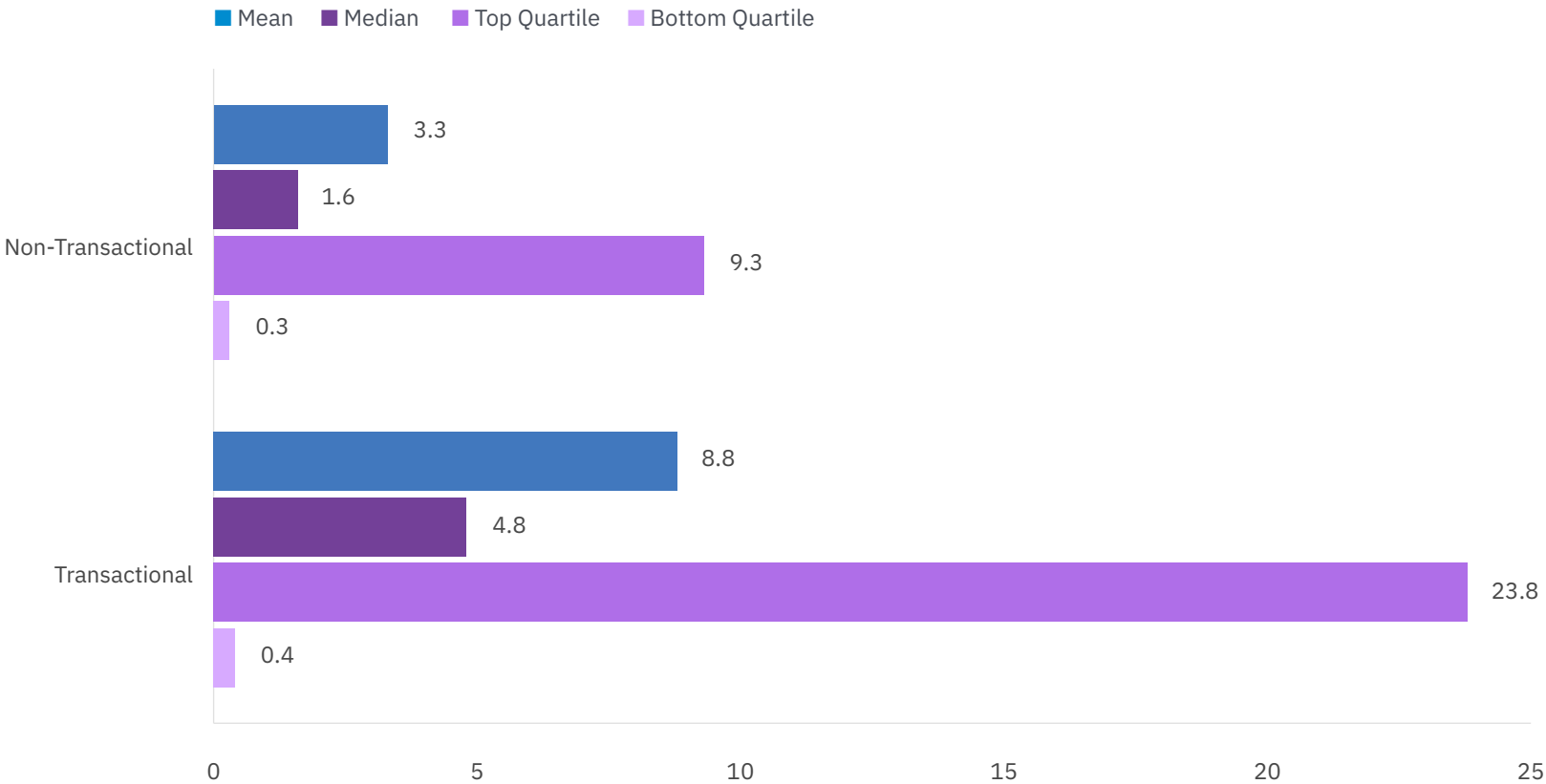
Click-Through (Unique)	Mean	Median	Top Quartile	Bottom Quartile
Automotive & Transportation	6.5	5.9	13.8	0.7
Banks & Financial Services	2.5	1.4	7.0	0.2
Computer Hardware & Telecommunications	4.7	1.3	15.2	0.2
Computer Software & Online Services	2.8	1.0	8.9	0.0
Consumer Products	4.5	1.6	14.0	0.3
Consumer Services	2.0	0.5	6.7	0.0
Corporate Services	2.8	1.0	8.7	0.1
Energy & Environmental	3.9	2.0	11.1	0.1
Food & Beverage	3.8	2.3	9.7	0.5
Hospitals, Healthcare & Biotech	3.3	1.2	10.2	0.1
Industrial Products	2.3	1.0	6.9	0.1
Insurance	4.6	2.0	13.7	0.2
Leisure, Sports & Recreation	4.0	1.5	12.3	0.2
Lodging, Travel Agencies & Services	3.8	1.3	12.0	0.2
Marketing & Advertising	3.8	1.7	11.2	0.2
Media & Publishing	2.7	1.4	7.3	0.2
Nonprofits, Associations & Government	3.2	1.4	9.5	0.1
Real Estate, Construction & Building Products	2.9	1.4	8.3	0.2
Retail & Ecommerce	3.0	1.7	7.9	0.4
Schools & Education	4.2	1.3	13.7	0.1

Observations

The highest mean click-through rates are from brands representing Automotive & Transportation (6.5%), Computer Hardware & Telecommunications (4.7%), Insurance (4.6%) and Consumer Products (4.5%). Computer Hardware & Telecommunications (15.2%) and Consumer Products (14.0%) had the highest top quartile rates.

Consumer Services (2.0% mean / 0.5% median) and Industrial Products (2.3% / 1.0%) were two of the lowest-performing industries across all CTR metrics.

Consider This: Make clicking links as easy as possible with the use of large buttons, placing text links in multiple locations, using lots of white space, and, when possible and practical, use benefit-driven calls to action on buttons rather than phrases like “click here.”



Observations

Transactional emails easily beat their non-transactional counterparts on every click-through rate metric. Given that these messages are based on a recipient’s purchase or conversion activity, it’s not a surprise to see that transactional messages generate high follow-on activity.

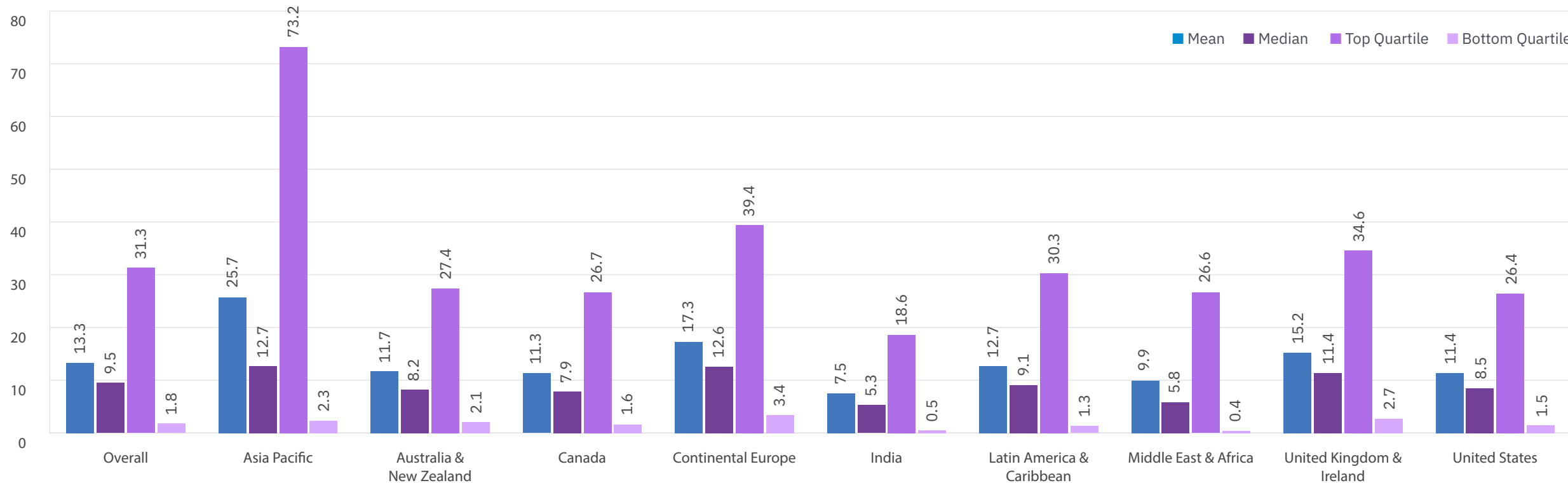
Transactional emails have a median CTR of 4.8%, exactly 3 times higher than the 1.6 percent generated by non-transactional messages.

The CTR for top-quartile transactional messages of 23.8% is more than 2.5 times higher than the non-transactional top performers.

These results suggest that smart marketers are finding ways to add value through transactional messages and are driving further engagement and action, such as purchasing a related product or service.

Consider This: To take your email engagement up a notch, consider offering an incentive for a related purchase, inviting buyers to review their purchases, join your loyalty club or user community, or linking to user information, how-to videos and other relevant information on your website.

“Smart marketers are finding ways to add value through transactional messages.”



Consider This: If your CTOR is subpar or merely average, try analyzing your actual clicks per link across several messages and look for patterns and trends. Which factors do you associate with higher clicks? Does one type of link (call to action buttons, product photos, text links), location in the email, or message design drive higher CTRs?

Combine this link analysis with overall CTOR to make and test assumptions about content, layout and offers that drive the highest engagement consistently.

Observations

Mean and median overall click-to-open rates were 13.3% and 9.5% respectively. Brands in Asia Pacific (25.7% / 12.7% / 73.2%) and Continental Europe (17.3% / 12.6% / 39.4%) took top honors on mean, median and top quartile click-to-open rates.



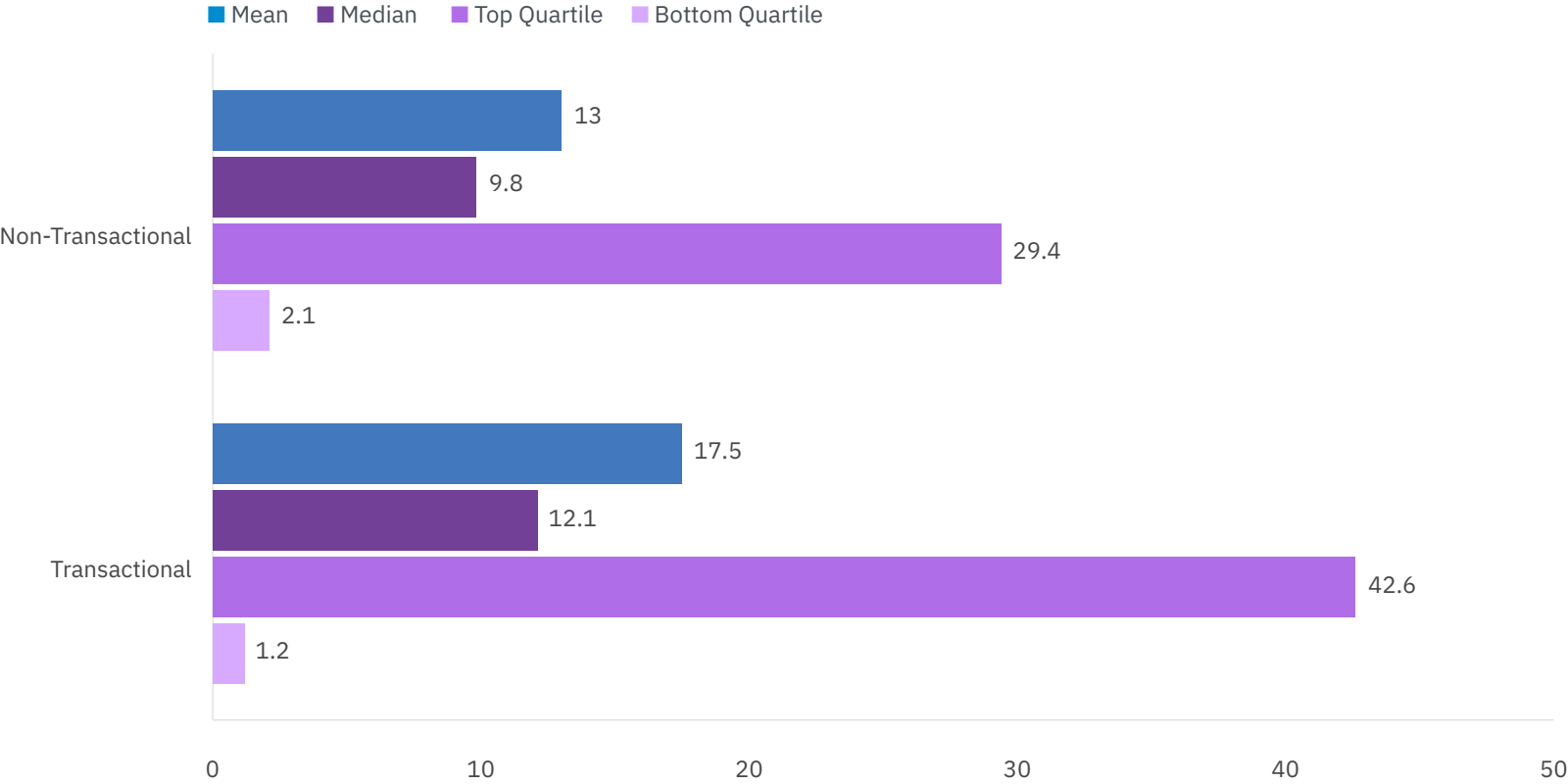
Click-To-Open Rate (Unique)	Mean	Median	Top Quartile	Bottom Quartile
Automotive & Transportation	13.1	11.9	25.4	3.0
Banks & Financial Services	10.9	8.7	24.2	1.4
Computer Hardware & Telecommunications	11.0	6.1	28.9	1.5
Computer Software & Online Services	10.6	6.8	27.3	0.5
Consumer Products	22.3	11.2	61.5	2.9
Consumer Services	8.6	4.5	24.6	0.0
Corporate Services	12.9	8.8	31.4	1.4
Energy & Environmental	11.7	7.8	28.2	1.2
Food & Beverage	13.2	10.8	27.4	3.1
Hospitals, Healthcare & Biotech	11.9	6.8	31.4	1.0
Industrial Products	10.6	6.8	26.3	0.9
Insurance	13.2	8.7	32.9	1.2
Leisure, Sports & Recreation	16.7	11.2	40.3	2.4
Lodging, Travel Agencies & Services	11.0	8.1	25.4	1.8
Marketing & Advertising	13.1	9.6	30.3	1.9
Media & Publishing	12.8	10.0	28.3	1.8
Nonprofits, Associations & Government	9.8	6.5	24.4	0.7
Real Estate, Construction & Building Products	10.2	6.9	24.6	1.0
Retail & Ecommerce	12.6	10.1	26.2	3.1
Schools & Education	11.7	7.7	29.2	1.3

Observations

Consumer Products (22.3% / 61.5%) and Leisure, Sports & Recreation (16.7% / 40.3%) had the highest mean and top quartile CTORs.

Among the underperformers were Consumer Services (8.6% / 24.6%) and Nonprofits, Associations & Government (9.8% / 24.4%).

Consider This: The CTOR is a great metric for diagnosing design and copy shortcomings in your messages. But it can also seem a bit surprising as messages with a significantly higher open rate but similar number of clicks as other messages will have a much lower click-to-open rate. As such, use CTOR to isolate and uncover opportunities to improve the percentage of clicks.



Observations

Top-quartile performers see nearly 43% of transactional messages clicked after being opened. While mean and median CTOR for transactional emails are only 4.5 and 2.3 percentage points higher, respectively, than for non-transactional messages, they are 13.2 percentage points higher for the top quartile performers.

Consider This: The click-to-open rate for transactional messages emphasizes the need to look for opportunities to create a deeper level of engagement. If you want to become a top-performing brand, consider adding helpful content or a compelling call to action (CTA) to your transactional messages. By doing so, your email will achieve more than simply confirming a transaction

or providing a receipt. The best time to interact with a customer may be when they’re already engaged.

Suggested CTAs include offers for product usage guides, personalized recommendations or a sign-up for your promotional email program. Additionally, consider promoting your other channels such as social media, SMS and mobile app if you offer one.

List Churn Metrics



18 Hard Bounce Rates
by Geography

19 Hard Bounce Rates
by Industry

20 Unsubscribe Rates
by Geography

21 Unsubscribe Rates
by Industry

22 Complaint Rates
by Geography

23 Complaint Rates
by Industry

Overview

List churn metrics reveal reader disengagement and discontent and also provide insights into your data-management practices.

Rising unsubscribe rates might indicate that your email program doesn’t match what subscribers expected when they signed up. If your unsubscribe rate rises over time or remains constant while spam complaints increase, you might have an unclear unsubscribe process. Worse yet, you may be losing the trust of your subscribers.

Higher-than-average hard bounce rates may indicate you are not eliminating bad email addresses vigorously enough at opt-in or that your operations are not practicing best-in-class, ongoing list hygiene.

See how AI can predict churn before it happens:

Try the interactive demo

Marketer
Show marketing benchmark named Asia Pacific

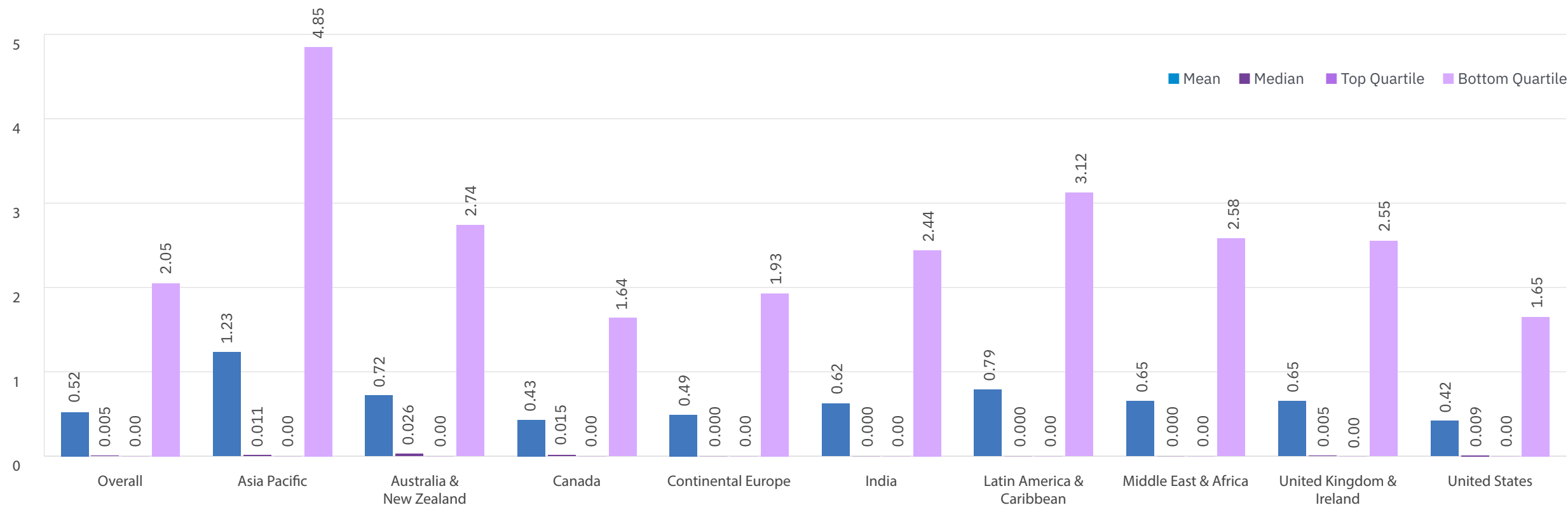
Watson
I have found the following benchmark named “Asia Pacific”.

Search for help

Location: Asia Pacific		
Metric	Mean	Median
CTOR	25.7%	12.70%
Click-Through Rate	2.30%	1%
Complaint Rate	0.01%	0%
Hard Bounce	1.23%	0.01%
Open Rate	12.5%	8.30%
Unsubscribe Rate	0.07%	0%



Watson Marketing customers can quickly find churn metrics for their campaigns with the AI-powered Watson Assistant.



Observations

Except for Asia Pacific at 1.23%, most brands in regions around the world are seeing hard bounce rates within a close range of the overall mean rate of 0.52%

Consider This: The hard bounce rate is a reasonable proxy for your list hygiene efforts, so monitor your rates closely. If you are frequently above the mean then you likely have some issues with your approach to subscriber acquisition or how you are managing your database.



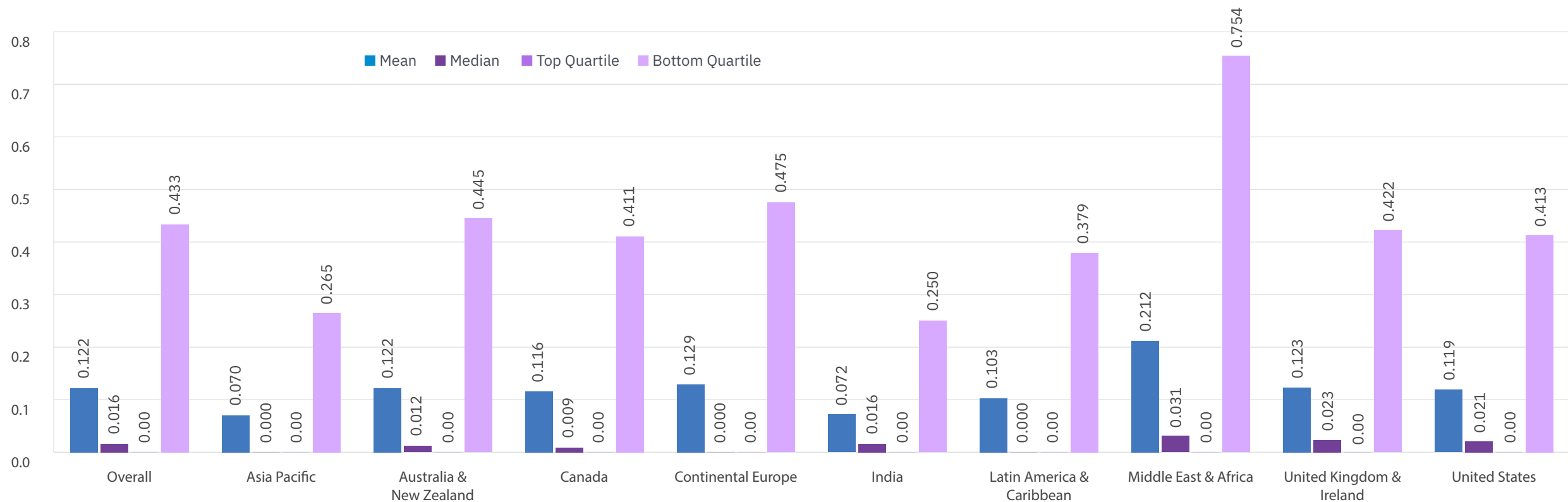
Hard Bounce Rate	Mean	Median	Top Quartile	Bottom Quartile
Automotive & Transportation	0.479	0.000	0.00	1.88
Banks & Financial Services	0.627	0.000	0.00	2.46
Computer Hardware & Telecommunications	0.858	0.052	0.00	3.22
Computer Software & Online Services	0.454	0.014	0.00	1.75
Consumer Products	1.167	0.025	0.00	4.57
Consumer Services	2.259	0.136	0.00	7.42
Corporate Services	0.921	0.076	0.00	3.42
Energy & Environmental	1.380	0.095	0.00	5.21
Food & Beverage	0.348	0.013	0.00	1.33
Hospitals, Healthcare & Biotech	0.619	0.028	0.00	2.38
Industrial Products	0.800	0.097	0.00	2.93
Insurance	0.968	0.071	0.00	3.64
Leisure, Sports & Recreation	0.565	0.000	0.00	2.24
Lodging, Travel Agencies & Services	0.297	0.015	0.00	1.15
Marketing & Advertising	0.844	0.019	0.00	3.29
Media & Publishing	0.151	0.005	0.00	0.59
Nonprofits, Associations & Government	0.206	0.004	0.00	0.80
Real Estate, Construction & Building Products	0.345	0.000	0.00	1.31
Retail & Ecommerce	0.313	0.006	0.00	1.23
Schools & Education	0.508	0.017	0.00	1.96

Observations

Unlike the regional data, mean hard bounce rates vary widely by industry, from a low of 0.15% for Media & Publishing companies to a high of 2.26% for Consumer Services organizations. These differences are likely a simple result of frequency and math.

It’s not uncommon for Media & Publishing companies, as well as Retail & Ecommerce (0.31%) and Lodging, Travel Agencies & Services (0.3%), to send core broadcast emails three to five times a week or more while services and many other industries may only send a few messages in an entire month.

When you send emails more frequently, the hard bounces your message sends generate will be processed more frequently. This reduces the number of bounces per send but not the overall amount.



Observations

The overall mean unsubscribe rate is 0.12% with India (0.07%) and Asia Pacific (0.7%) having the lowest rates. The Middle East & Africa region was the only region that was significantly higher than the overall mean rate.

Consider This: With even bottom-quartile performers averaging an unsubscribe rate well below 1%, you might be tempted to downplay this metric. However, be sure to understand how unsubscribes affect your database growth.

Improving your unsubscribe rate just 0.1% would save 1,000 subscribers every time you send to a database of 1 million people. That’s more than 200,000 contacts retained over a year if you send four emails per week.

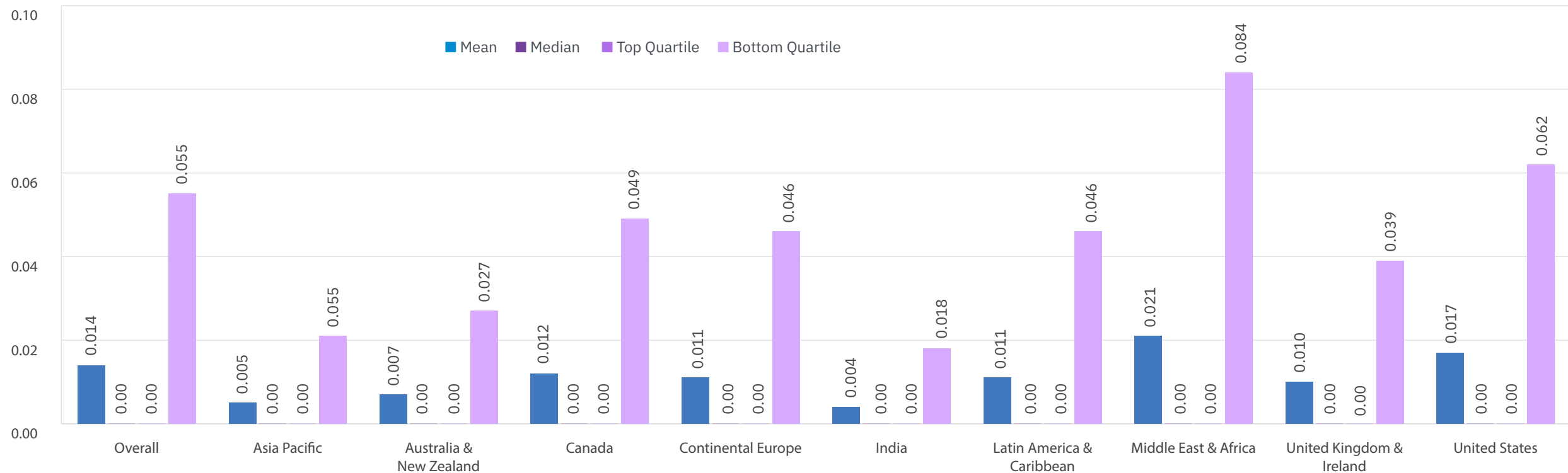


Unsubscribe Rate	Mean	Median	Top Quartile	Bottom Quartile
Automotive & Transportation	0.11	0.000	0.000	0.42
Banks & Financial Services	0.13	0.000	0.000	0.49
Computer Hardware & Telecommunications	0.12	0.020	0.000	0.42
Computer Software & Online Services	0.17	0.053	0.000	0.55
Consumer Products	0.11	0.025	0.000	0.38
Consumer Services	0.14	0.042	0.000	0.46
Corporate Services	0.18	0.026	0.000	0.62
Energy & Environmental	0.12	0.000	0.000	0.42
Food & Beverage	0.12	0.019	0.000	0.44
Hospitals, Healthcare & Biotech	0.13	0.008	0.000	0.45
Industrial Products	0.17	0.024	0.000	0.57
Insurance	0.13	0.013	0.000	0.47
Leisure, Sports & Recreation	0.12	0.000	0.000	0.43
Lodging, Travel Agencies & Services	0.10	0.040	0.000	0.31
Marketing & Advertising	0.17	0.045	0.000	0.56
Media & Publishing	0.07	0.010	0.000	0.25
Nonprofits, Associations & Government	0.12	0.020	0.000	0.39
Real Estate, Construction & Building Products	0.19	0.061	0.000	0.61
Retail & Ecommerce	0.11	0.041	0.001	0.35
Schools & Education	0.13	0.023	0.000	0.46

Observations

Mean unsubscribe rates vary widely by industry, from a low of 0.07% for Media & Publishing companies to a high of 0.19% for Real Estate, Construction & Building Products companies.

Consider This: A general best practice for keeping unsubscribe rates low is to make opting out easy and providing alternatives to unsubscribing. This includes allowing subscribers to easily change email addresses, lists and frequency, and to update their profile preferences. Most importantly, you should, of course, strive to deliver on your subscriber’s exceptions after opting in and provide ongoing value through content and relevant offers.



Observations

The mean spam complaint (“abuse”) rate ranges from a low of 0.004% in India to a high of 0.021% in the Middle East & Africa.



Complaint Rate	Mean	Median	Top Quartile	Bottom Quartile
Automotive & Transportation	0.016	0.0	0.0	0.064
Banks & Financial Services	0.016	0.0	0.0	0.062
Computer Hardware & Telecommunications	0.012	0.0	0.0	0.046
Computer Software & Online Services	0.014	0.0	0.0	0.052
Consumer Products	0.018	0.0	0.0	0.067
Consumer Services	0.021	0.0	0.0	0.082
Corporate Services	0.011	0.0	0.0	0.045
Energy & Environmental	0.016	0.0	0.0	0.064
Food & Beverage	0.014	0.0	0.0	0.054
Hospitals, Healthcare & Biotech	0.015	0.0	0.0	0.060
Industrial Products	0.008	0.0	0.0	0.032
Insurance	0.017	0.0	0.0	0.065
Leisure, Sports & Recreation	0.012	0.0	0.0	0.047
Lodging, Travel Agencies & Services	0.012	0.0	0.0	0.043
Marketing & Advertising	0.021	0.0	0.0	0.080
Media & Publishing	0.011	0.0	0.0	0.039
Nonprofits, Associations & Government	0.014	0.0	0.0	0.055
Real Estate, Construction & Building Products	0.015	0.0	0.0	0.062
Retail & Ecommerce	0.014	0.0	0.0	0.048
Schools & Education	0.013	0.0	0.0	0.050

Observations

Industrial Products (0.008%), Media & Publishing (0.011%) and Corporate Services (0.011%) companies had the lowest mean abuse rates. Consumer Services (0.021%) Marketing & Advertising (0.021%), and Consumer Products (0.018%) had the highest complaint rates.

“If your complaint rate is higher than average, consider adding an extra unsubscribe link at the top of your email templates.”

Consider This: If your complaint rate is higher than average, consider adding an extra unsubscribe link at the top of your email templates. Subscribers sometimes hit the spam complaint button when they don’t know how to opt out or simply want to stop receiving your email. Making the unsubscribe link more prominent might stave off some of these complaints.

Email Usage & Engagement



25 Client/Device Usage
by Geography

26 Client/Device Usage
by Industry

27 Engagement Rates
by Geography

28 Engagement Rates
by Industry

Overview

While we are perhaps a decade past the time when marketers needed to understand whether or not a significant percentage of their subscribers were reading emails on mobile devices, there can still be huge differences in email behavior across geographic regions and industry categories.

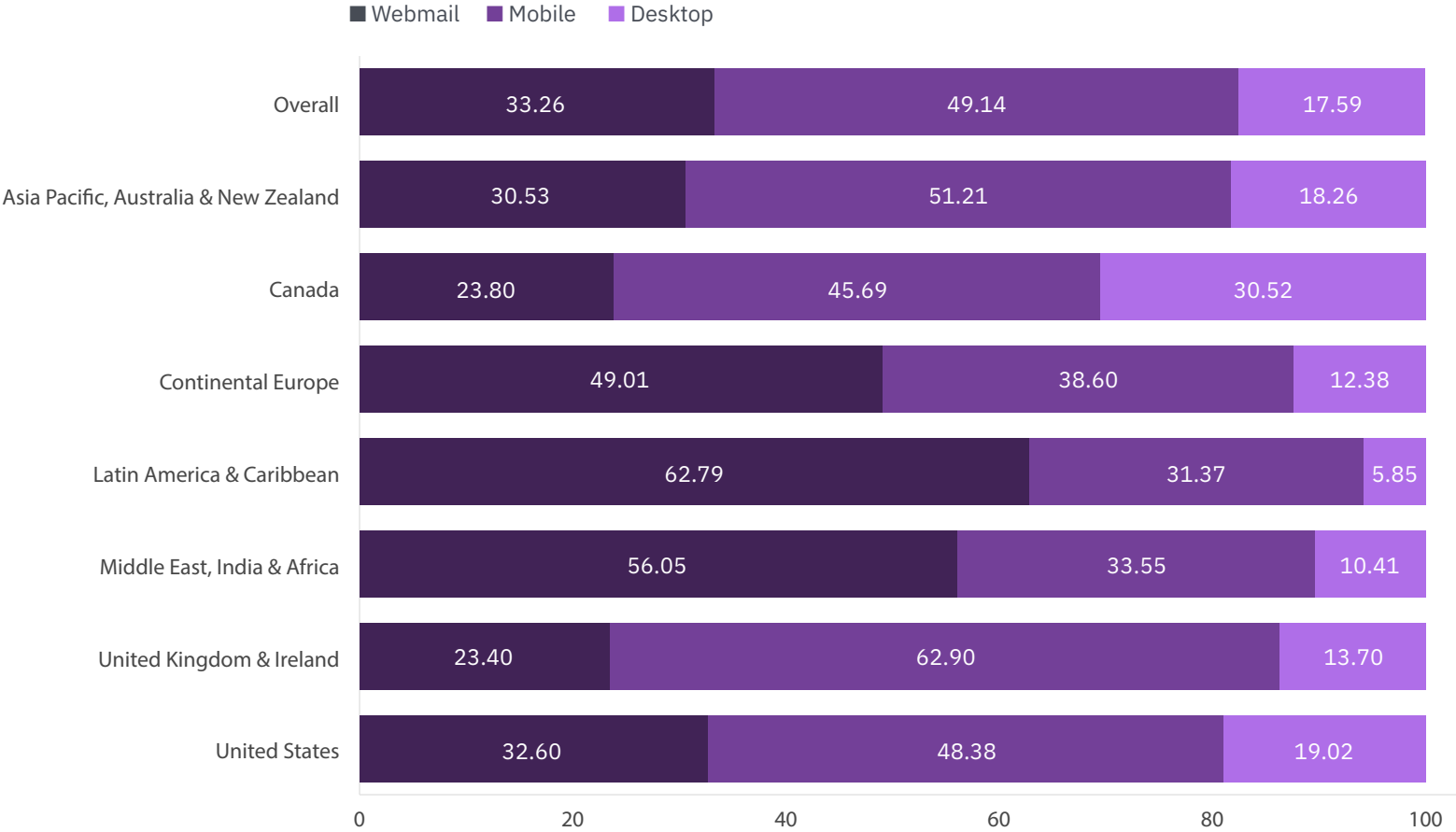
Having a detailed understanding of whether your subscriber base is a relatively higher user of desktop email clients, for example, means you may need to ensure your emails render correctly on Outlook and Lotus Notes.

Further, identifying customers based on whether they are highly engaged with your emails, e.g. in the Read rate category (8 seconds or more), can provide further opportunity for targeting or follow-on triggered messages.

Explore how personalization with Watson can drive engagement:

[View the demo](#)





Consider This: For more than a decade it has been important to optimize emails for consumption on multiple devices and email clients. However, the client/device data discussed here underscores the importance of prioritizing optimization based on targeted geographic regions. For example, United Kingdom & Ireland marketers clearly need to take a mobile first approach, and Canadian marketers need to ensure their emails view well on desktop email clients.

Observations

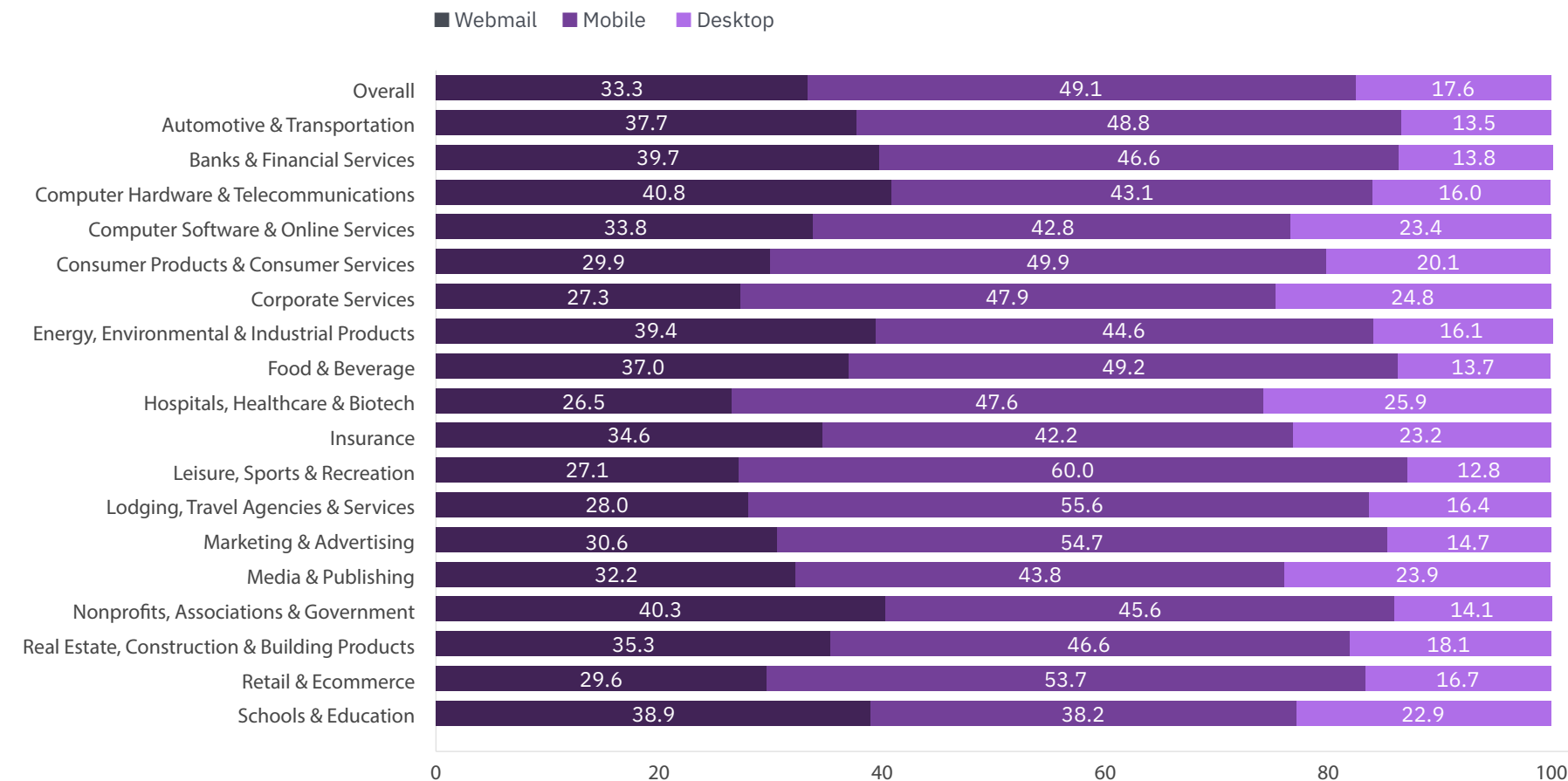
Nearly half (49.1%) of all emails are read on mobile devices throughout the world, though with some regions significantly higher and or substantially lower.

Webmail (33.3%) and desktop (17.6%) constitute the rest of the overall email readership.

Not surprisingly the United Kingdom region continues to have the highest mobile readership at 62.9%, almost double that of Latin America & Caribbean at 31.4%.

Desktop usage remains the highest in North America with Canada at 30.5% and the US at 19.0%. Latin America & Caribbean had the smallest level and a tiny share of desktop usage at 5.8%.

Webmail usage was highest in Latin America & Caribbean (62.8%) Middle East, India & Africa (56%) and Continental Europe (49%); while Canada at 23.8% and United Kingdom & Ireland (23.4%) had the lowest rates of webmail readership.

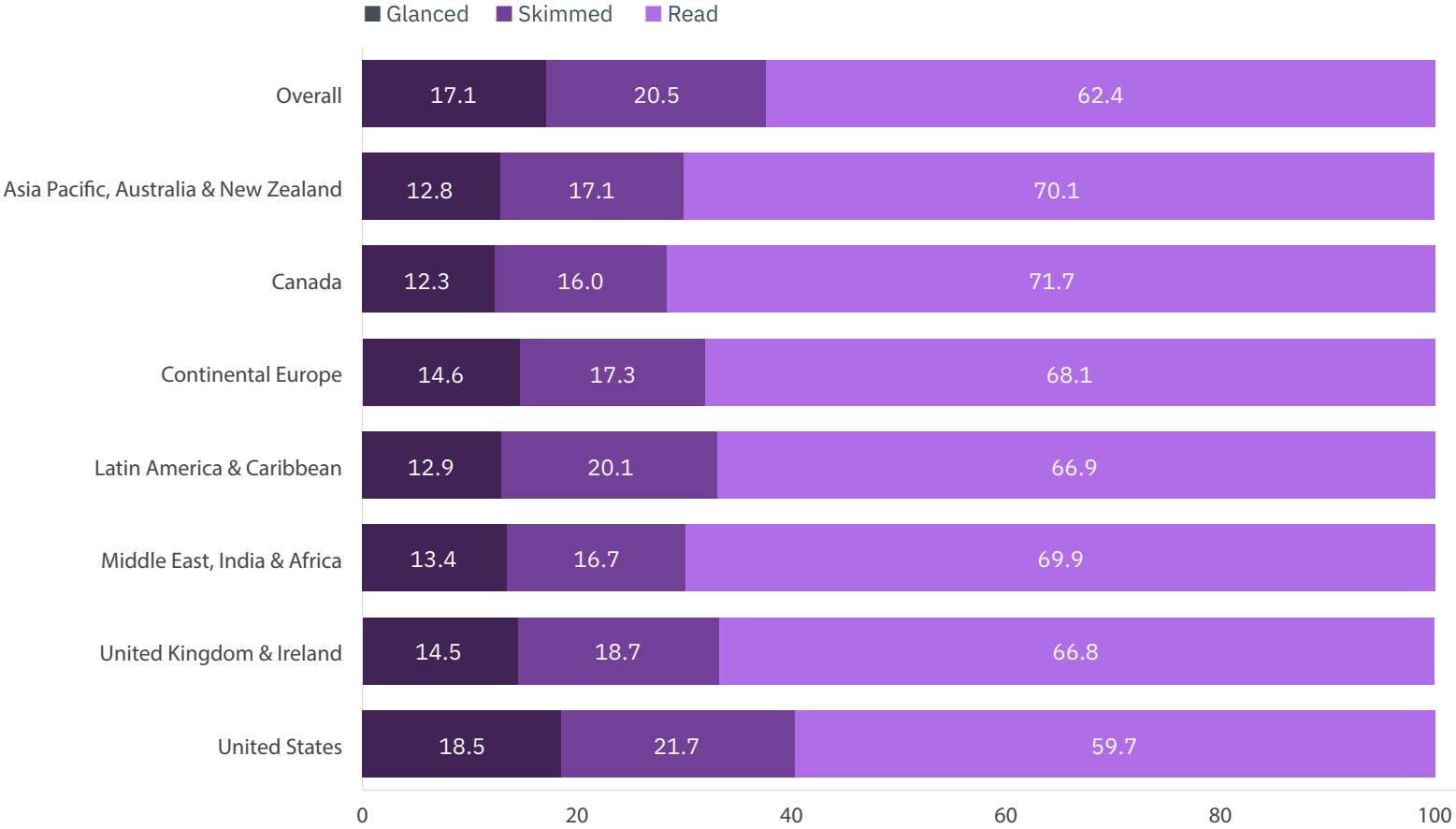


Observations

Mobile readership across industries ranged widely from a high of 60.0% for Leisure, Sports & Recreation to a low of 38.2% percent for Schools & Education. The high mobile readership makes sense for leisure industries as their very nature attracts a younger and literally mobile audience.

Hospitals, Healthcare & Biotech (25.9%) and Corporate Services (24.8%) brands had the highest desktop usage, while Computer Hardware & Telecommunications (40.8%) and Nonprofits, Associations & Government (40.3%) saw the highest use of webmail services.

Consider This: Monitor and understand the mix of devices and email clients that your subscribers are using to read emails as the mix may have changed significantly in the last few years. Understanding the nuances of email client readership levels can help you prioritize design compromises when you know, for example, that you have a much higher than average desktop client subscriber base.



Observations

Overall, more than 6 out of 10 (62.4%) emails tracked were classified as Read, followed by Skimmed (20.5%) and Glanced (17.1%).

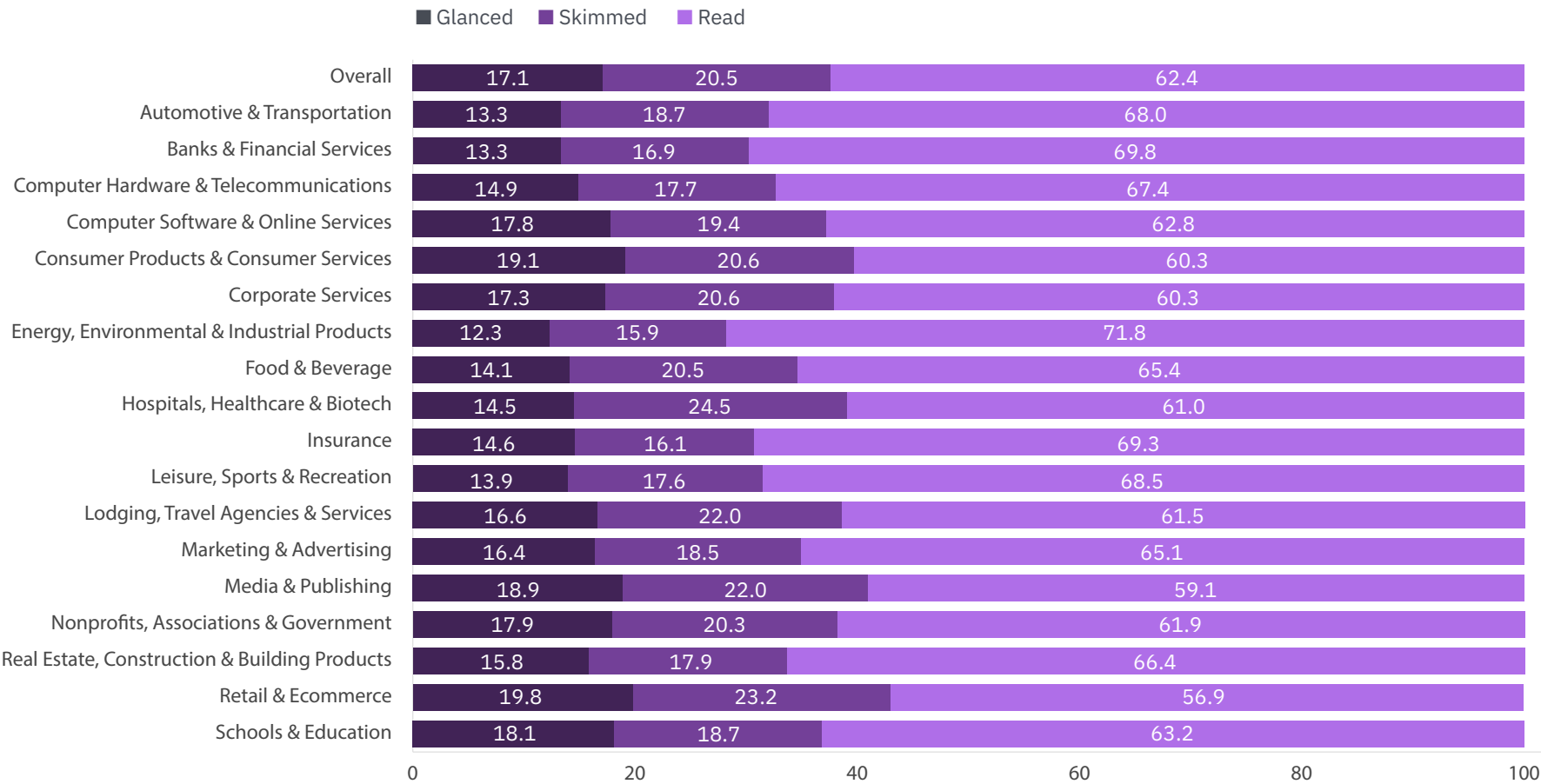
Canada (71.7%) and Middle East, India & Africa (69.9%) have the highest Read rates across the regions.

Defining Engagement Rate

Engagement rate, often called “read rate,” measures how long a recipient reviews or interacts with an email at three different time intervals:

- Read**
8 or more seconds
- Skimmed**
2 to 8 seconds
- Glanced/Deleted**
less than 2 seconds

Consider This: Email recipients in the US have the least amount of patience with emails with a read rate of only 59.7% and have the highest Skimmed rate at 21.7%. Marketers need to ensure emails contain appropriate offers and are visual, clear and focused to gain higher levels of engagement.



Observations

Energy, Utilities and Environmental (71.8%), Banks & Financial Services (69.8%) and Insurance (69.3%) had the highest Read rates respectively likely due to the complexity and regulatory aspects of these industries and the personal relevance of financial and insurance information.

Retail & Ecommerce (56.9% / 19.8%) and Consumer Products and Services (60.3% / 19.1%) have some of the lowest Read rates and conversely the highest Glance rates likely due to their product and transactional focus.

Media & Publishing has the second-lowest Read rate (59.1%) and third-highest Skimmed rate (22.0%), largely due to many of these emails using hyperlinked teaser headlines that are skimmed quickly and clicked on to navigate the reader to the full content.

Consider This: Understand how your emails are being read - are you in line with your industry or are you an outlier? Test different design and copy approaches not only to improve engagement and Read rates but, more importantly, to increase revenue and conversions.

Retail/ Ecommerce Holiday Statistics



30 Unique Open Rates

31 Click-Through Rates

32 Click-To-Open Rates

33 Hard Bounce Rates

34 Unsubscribe Rates

35 Complaint Rates

Overview

In this section we compare open, click-through and list churn rates for the Retail/Ecommerce sector sent during the “holiday season,” defined as November 22 through December 31, 2017, to “non-holiday” email metrics (e.g. the rest of the year).

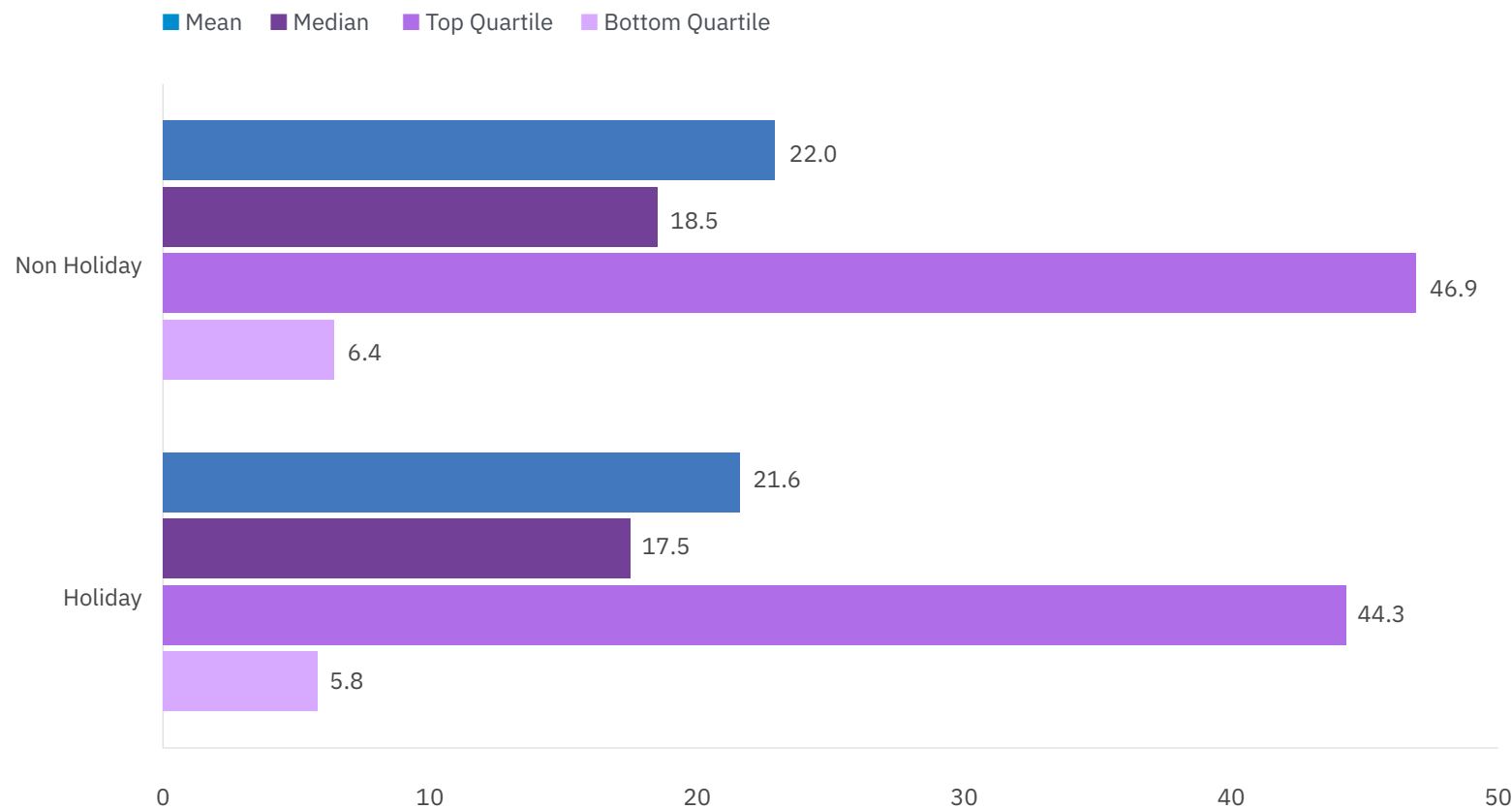
Why focus on this category? According to RJ Metrics, the holiday shopping period generates 50-100% more revenue than the rest of the year’s shopping days.

This also is the time of year when retail and ecommerce companies significantly increase their email cadences, often doubling the number of sends compared to the rest of the year.

Learn how IBM used data to find insights for retailers during the holiday season:

[Get the insights](#)



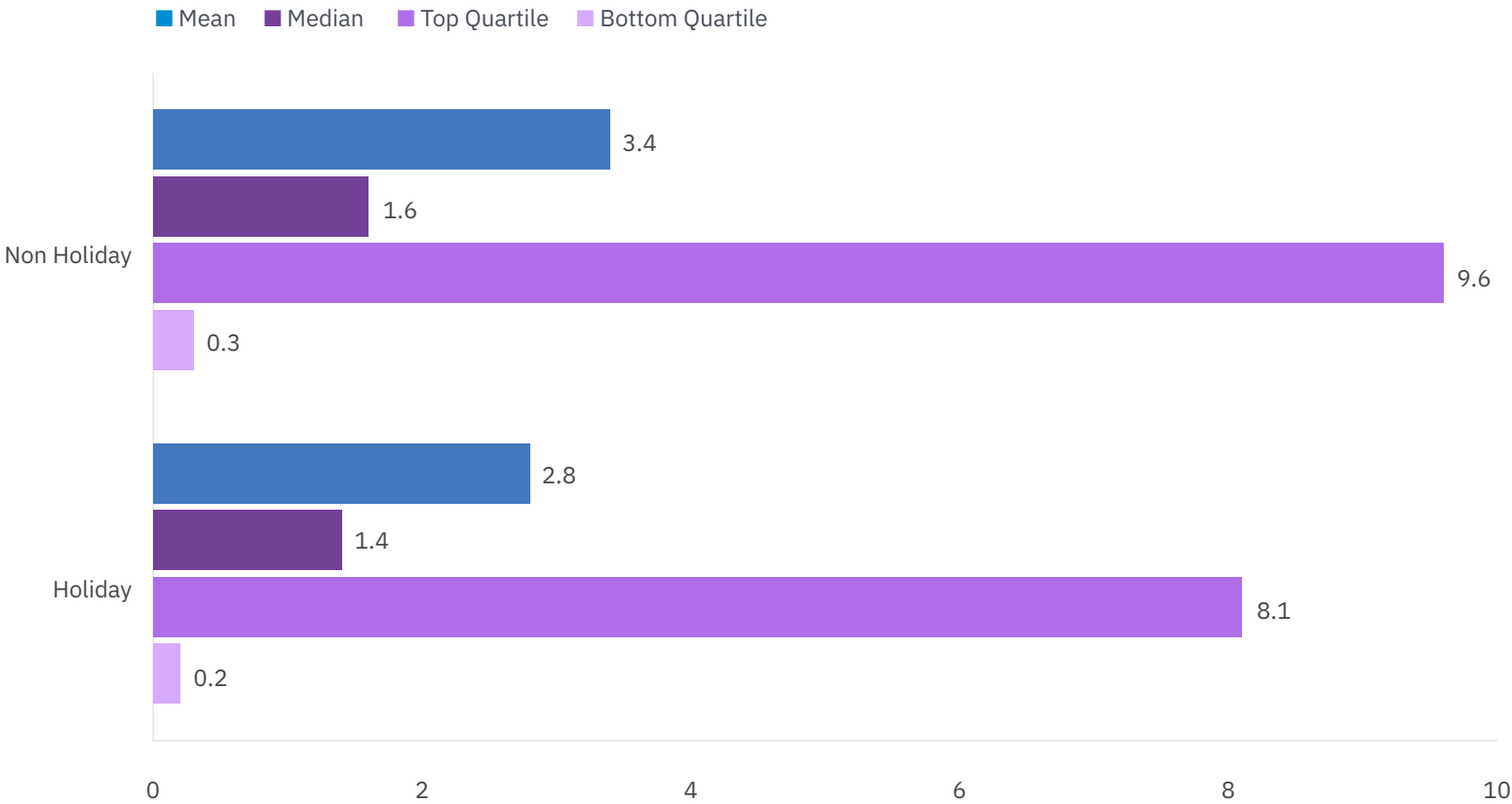


Observations

Not surprisingly, mean, median, top- and bottom-quartile open rates for Retailer/Ecommerce companies were higher during the non-holiday time of year than in the throes of the holiday shopping season. Across most of the measures, open rates are lower by about 5% or more during the holiday season.

Consider This: Although open rates are lower, total opens for the period will be considerably higher because of higher send frequency. If you hypothetically were to increase your reach by 100% and then realize lower open rates by less than 10 percent, you would still be far ahead in terms of overall engagement during this period.

“Total opens for the holiday period will be considerably higher because of higher send frequency.”



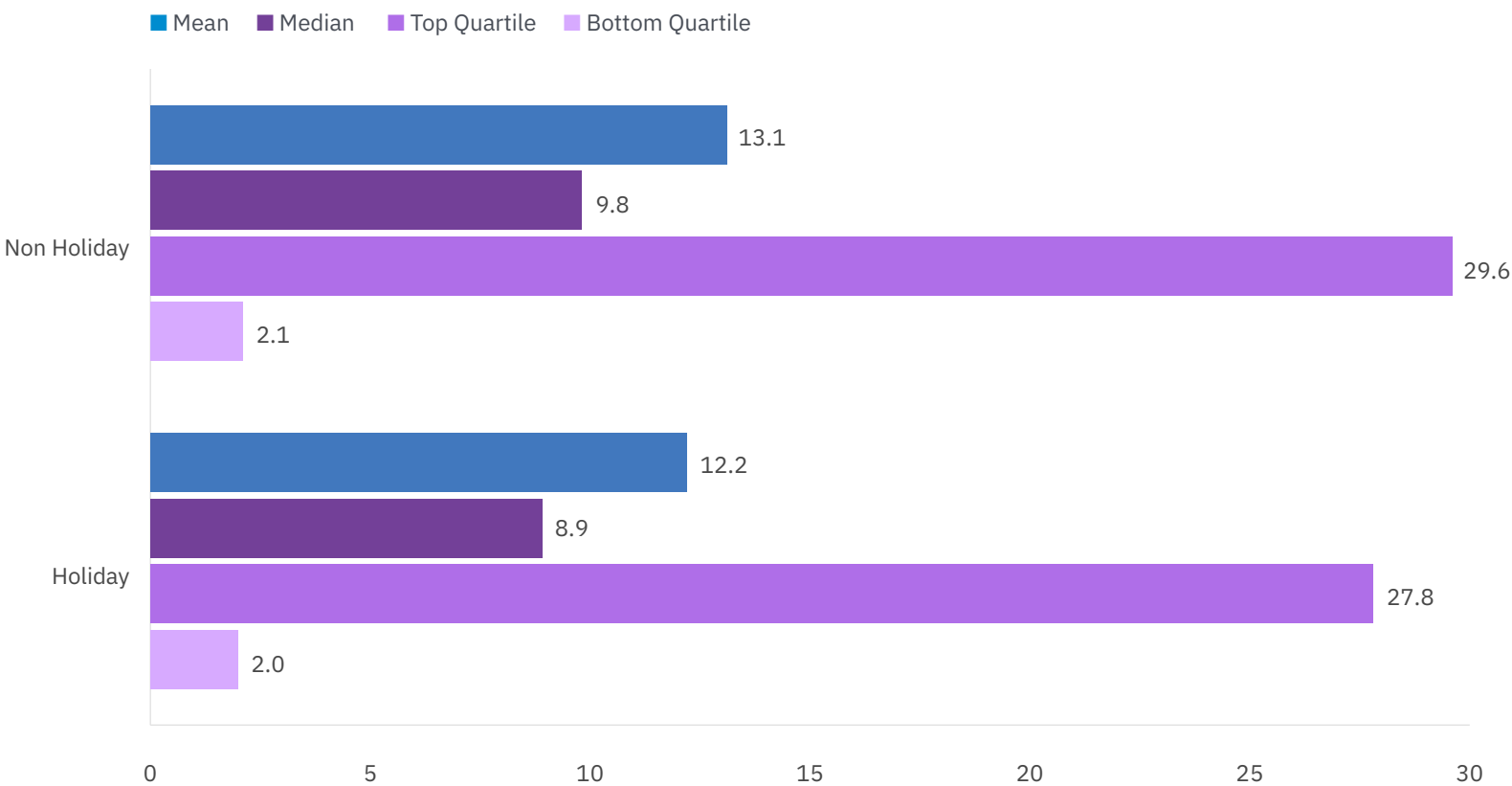
Observations

Mean click-through rates are 0.60 percentage points lower during the holiday season (a 21% decrease versus the non-holiday CTR). This is a greater disparity than the difference in open rates.

You might expect click-through rates to be higher during the holidays because of aggressive discounts, free shipping offers and urgent deadlines. However, the increased send volume spreads the click increases across many more email sends.

Consider This: Readers are likely only glancing at your holiday messages and are motivated differently based on how discounts and offers are presented. It is critical to prioritize your core calls to action (CTAs) above secondary ones and to describe any discounts as either the amount off or the percent off, the original price and the new price.

“It is critical to prioritize your core CTAs because readers are only glancing at your holiday messages.”

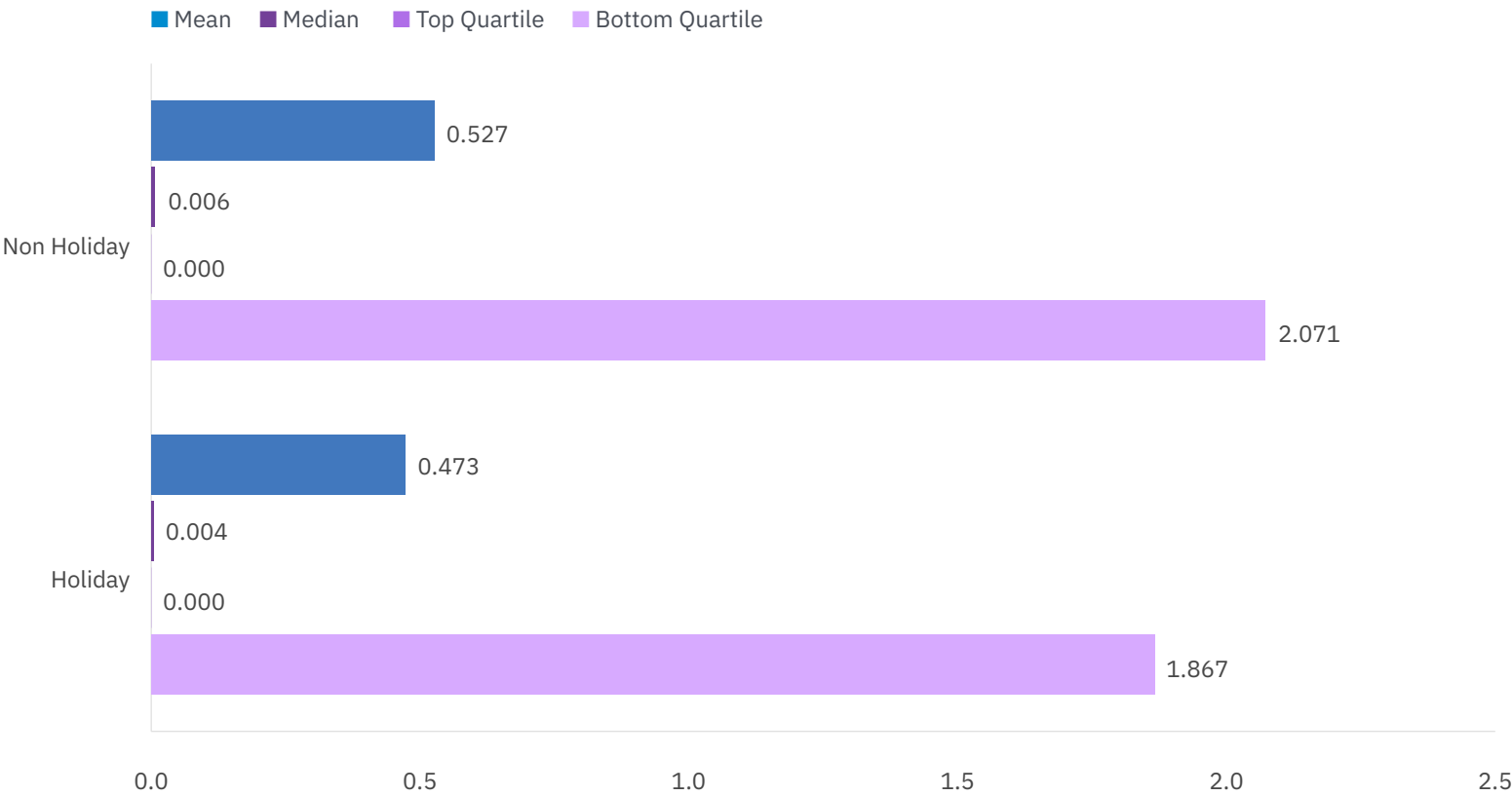


Observations

Mean and median CTORs were about 1 percentage point lower during the holidays suggesting that strong offers and calls to action perform well enough, but that retailers could improve these results. With higher purchase rates during the holidays, click-throughs in opened emails should be higher. Emails that lack personalization and those that contain undifferentiated offers are likely not motivating enough recipients to act.

Consider This: Beyond the core calls to action, consider adding high-value content, holiday buying tips, user-generated content and other approaches to drive increased engagement – especially during the holiday time period.

“Emails that lack personalization are likely not motivating enough recipients to act.”

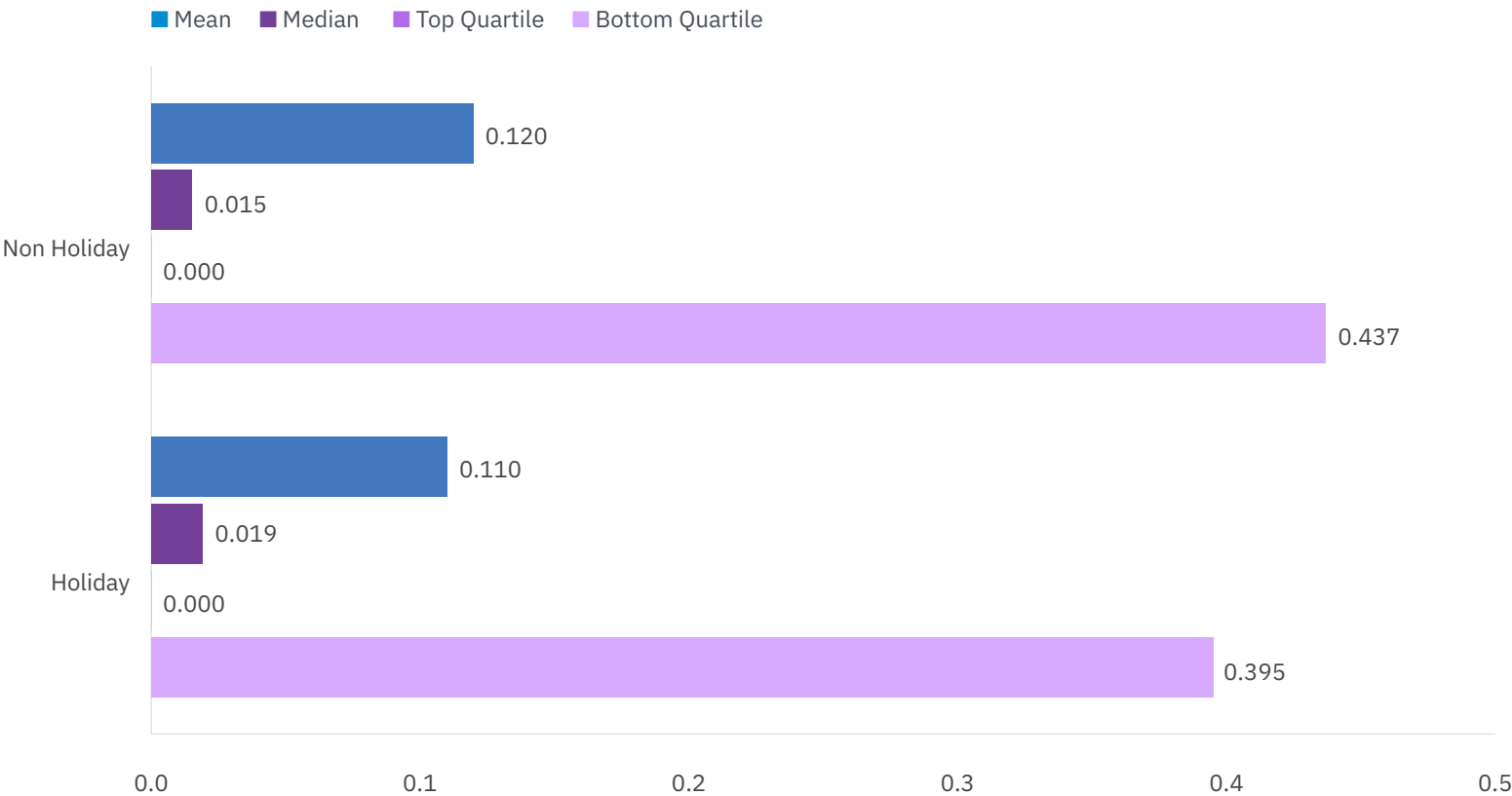


Observations

Further confirming the effect of increased cadence, the mean hard bounce rate for Retail/Ecommerce companies during the holiday season was more than 0.05 percentage points lower (or more than 11%) versus the non-holiday portion of the year.

How does that happen? Again, frequency explains it. Given that most retailers at least double the cadence of their emails during the holidays, they’re also processing hard bounces more frequently. This reduces the per-send rate.

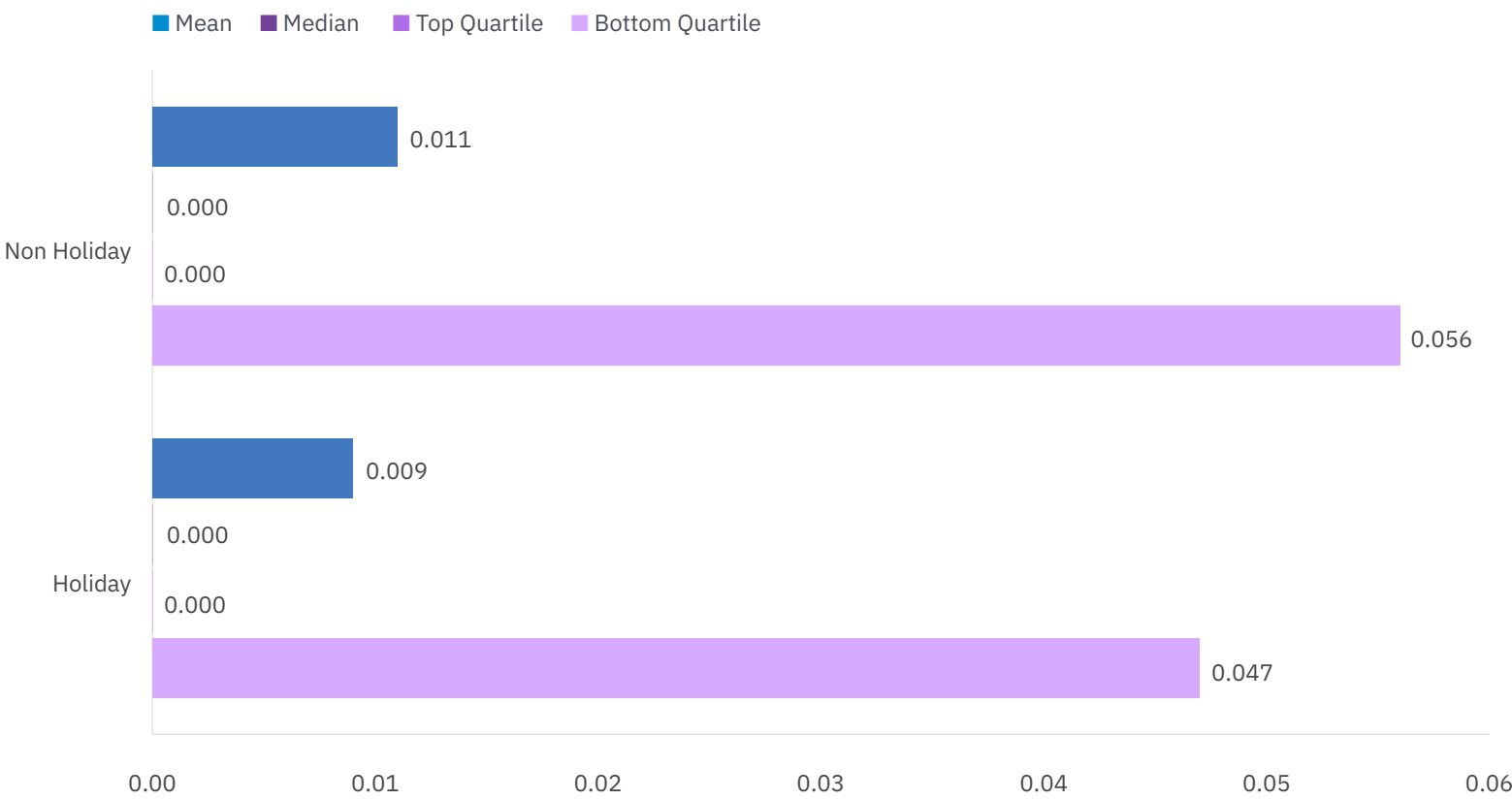
Consider This: Because your hard bounce rate likely will be lower during higher frequency periods such as the holidays, monitor these rates closely. If they are higher than during the non-holiday period, you could have an emerging issue resulting from your holiday subscriber acquisition approaches.



Observations

Holiday period unsubscribe rates are relatively close to the non-holiday period with mean and median rates flip-flopping across the two periods. This relative closeness might suggest that consumers are becoming more accepting of higher send frequencies during the holidays.

Consider This: To reduce the number of unsubscribes during the holiday period, send a holiday “welcome” message in November to inform subscribers of not only the upcoming increased send frequency, but also the value-add services and features you will offer. These may include a shipping option calendar, e-gift cards, return policy protocols, store locations, and so on. Also, consider asking subscribers to update their preferences and to provide them an option to snooze messages after clicking the unsubscribe link.



Observations

Contrary to what may seem more logical, spam complaint rates are higher per send during the non-holiday period. Because shopper inboxes typically get “pummeled” during the holiday season, conventional thinking would be that consumers are more likely to opt out of email programs during this time of the year.

Two factors may lead to a lower per email spam complaint rate. First, consumers have come to expect a material increase in emails from retailers and ecommerce providers during the holidays. As such, they have become more tolerant of this seasonal increase.

Second, the simple math-effect is at work again with a higher frequency spreading the spam complaints out across more messages. For example, sending 16 times per month (four times per week) to a list of 100,000 during the non-holiday period and generating the mean spam complaint rate would produce 176 complaints per send. Sending 28 times per month (7 times per week) during the holiday season would produce 144 complaints per send.

Consider This: Having your messages blocked during the holiday season due to exceeding an ISPs complaint rate threshold could be devastating to your revenue goals. It is especially important during the holidays to manage and meet subscriber expectations, make it simple to unsubscribe (while offering alternatives), and to personalize messages based on behavior and preferences.

Mobile & Multichannel



37 SMS Delivery Rates

38 SMS Opt Outs
as a Percentage of New Opt-Ins

39 SMS Messages Sent
per Month

40 Mobile Push Open Rates
Inbox Push vs. Simple Push

40 URL Click-Through Rates
Inbox Push vs. Simple Push

41 Average Monthly Volume
by Channel

42 Median Sends
per Month

Overview

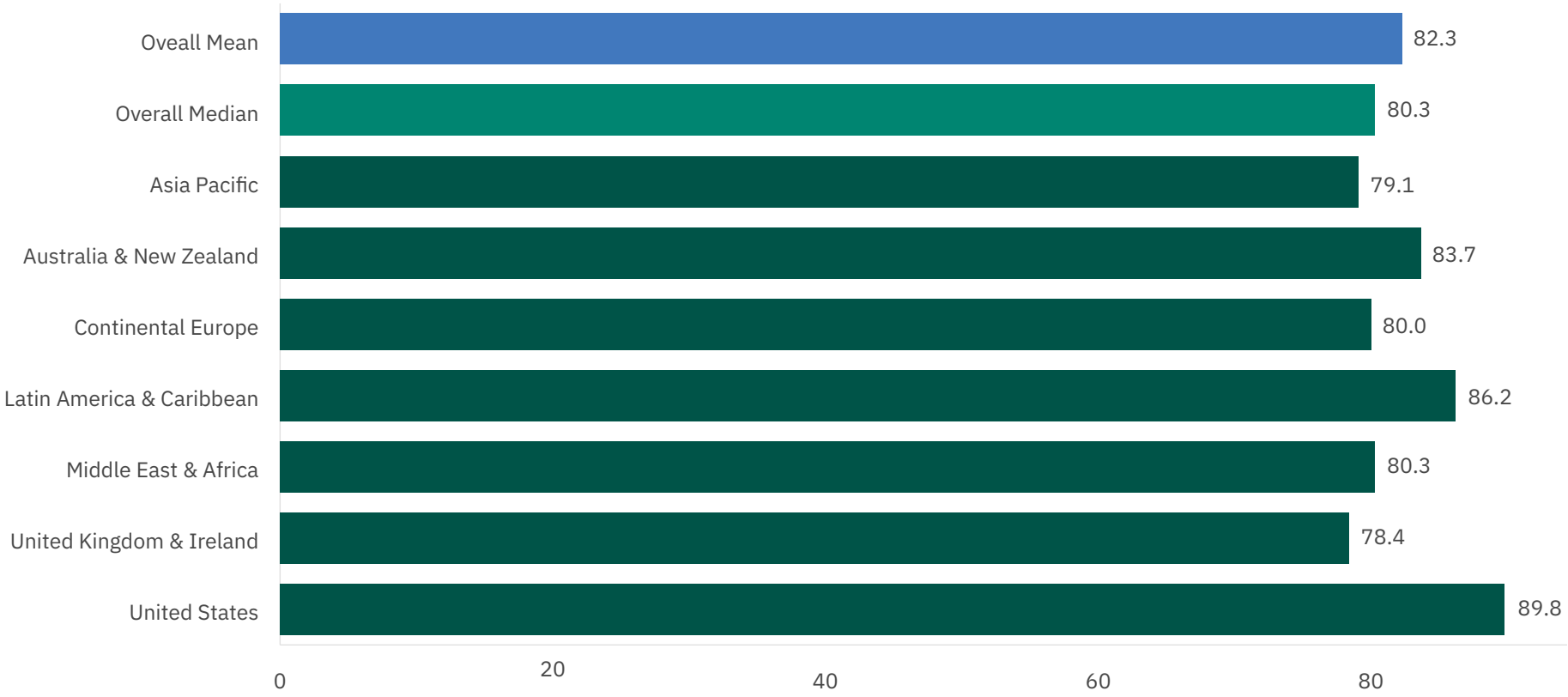
Whether you are just getting started with mobile marketing or well down the path with SMS and/or mobile push, use the benchmarks in this section to make the case for more mobile marketing resources and to help set targets for improvement in the future.

If you are focused on a single channel, use these metrics to start a conversation with peers in other channels on how to more effectively pursue a multichannel marketing approach or emphasize specific channels where individual customers may be much more engaged.

See how AI can help you drive loyalty across all touch points:

[Watch the webinar](#)



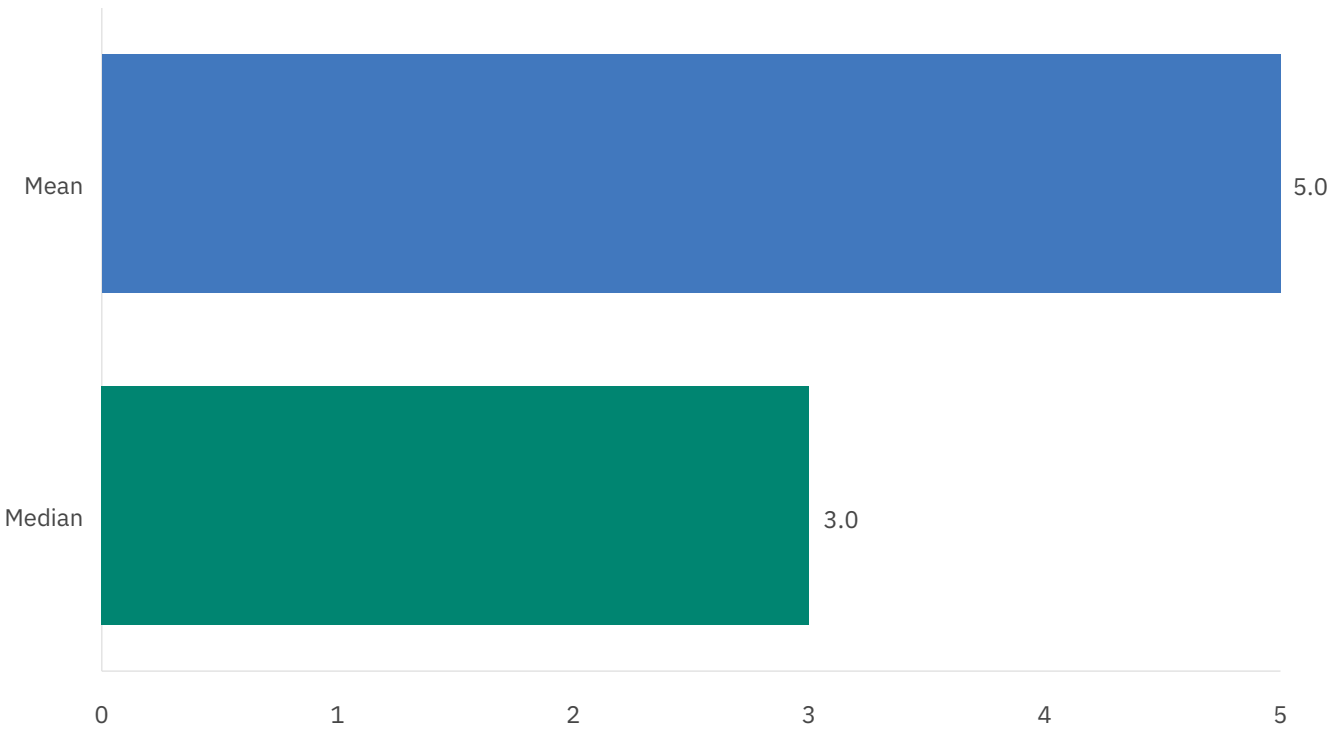


Observations

There are several factors that contribute to SMS delivery rates including carrier routing issues, carrier spam filtering, the status of a recipient’s phone (powered on or off), incorrect mobile numbers, roaming, and whether a recipient has switched carriers.

Overall, our clients are realizing average and median SMS delivery rates of around 82%. The United States has the highest delivery rate at 89.8%, whereas the United Kingdom & Ireland has the lowest at 78.4%.

Consider This: Though you can’t control carrier issues, during the opt-in process you must ensure that you convey your SMS messaging value proposition and seek to increase accuracy in obtaining a subscriber’s mobile number. Also, attempt to capture a subscriber’s email address so that you can communicate with them in the case where SMS messages are not able to be delivered. Lastly, make sure your SMS messages deliver value to your customers. You can achieve this via service updates, timely notifications, tips, and other targeted content versus only the latest discount offer.



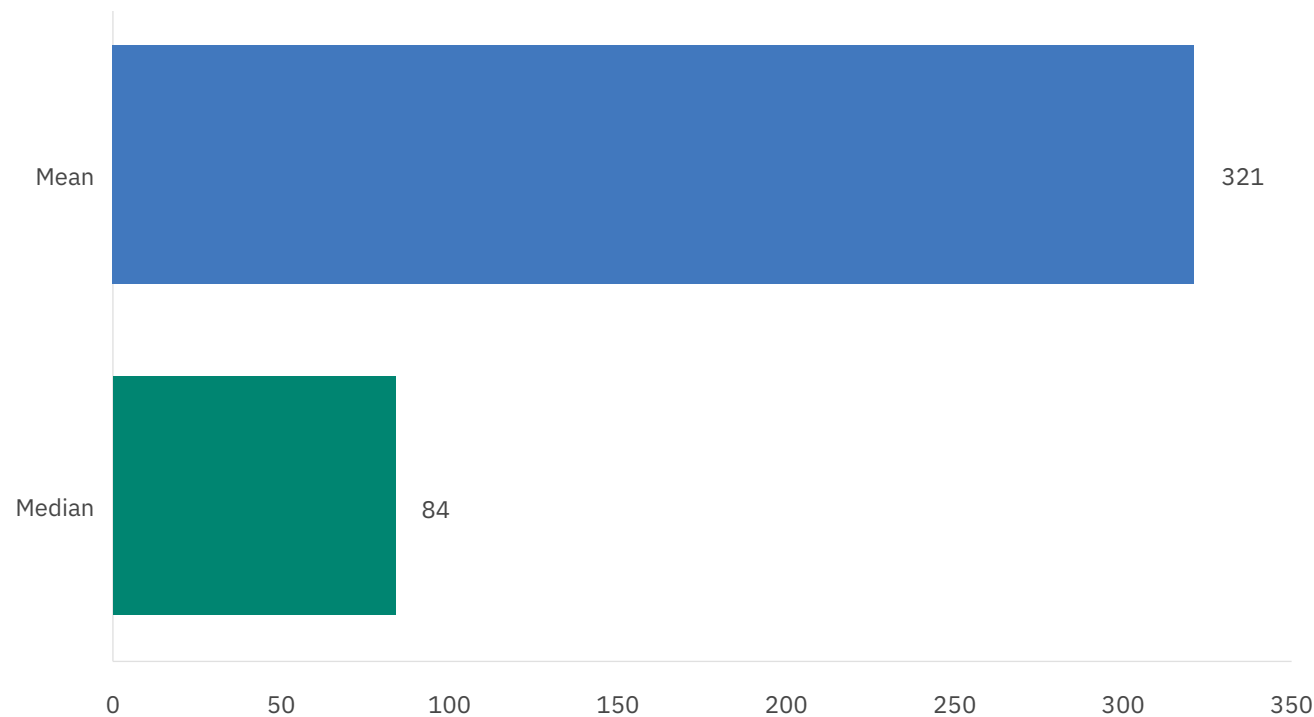
Consider This: Are you actively tracking and managing your SMS opt out rate? If you have a significantly higher-than-average percentage of opt outs versus opt ins each month, it likely means your channel value proposition is falling short. While you may be successfully acquiring many new subscribers, your frequency of message sends and/or the relevance of your content is not resonating via SMS. A best practice is to use SMS to drive subscriber opt ins to email and mobile app programs. Brands can then use a multichannel approach for their customer experiences which will be less reliant on a high frequency of SMS messages.

Observations

List growth is a key metric for any messaging channel and is a particularly vital measure of the health of an SMS marketing program. SMS can be perceived by recipients as a more invasive or “in your face” channel because of its always-on nature. As such, managing expectations and using the SMS channel appropriately is critical to growing an SMS database while minimizing out outs.

For this benchmark metric, we calculated monthly SMS opt outs as a percentage of new monthly opt in subscribers. We found a mean rate of 5% and median of 3%. This means, for example, that if you were to add 1,000 new subscribers in a month, you also lost 50 (mean) or 30 (median) subscribers to opt outs, providing a net gain of 950 or 970 subscribers for the month.

Across the data, we saw a wide range of opt out to opt in ratios, from a low of less than 1% to a high of more than 20%. The primary difference appears to be the nature of a brand’s business. Many brands with a very high number of opt ins also had a proportionally high number of opt outs, clearly attributed to aggressive opt in methods which can lead to a short-term-oriented and fickle subscriber base.



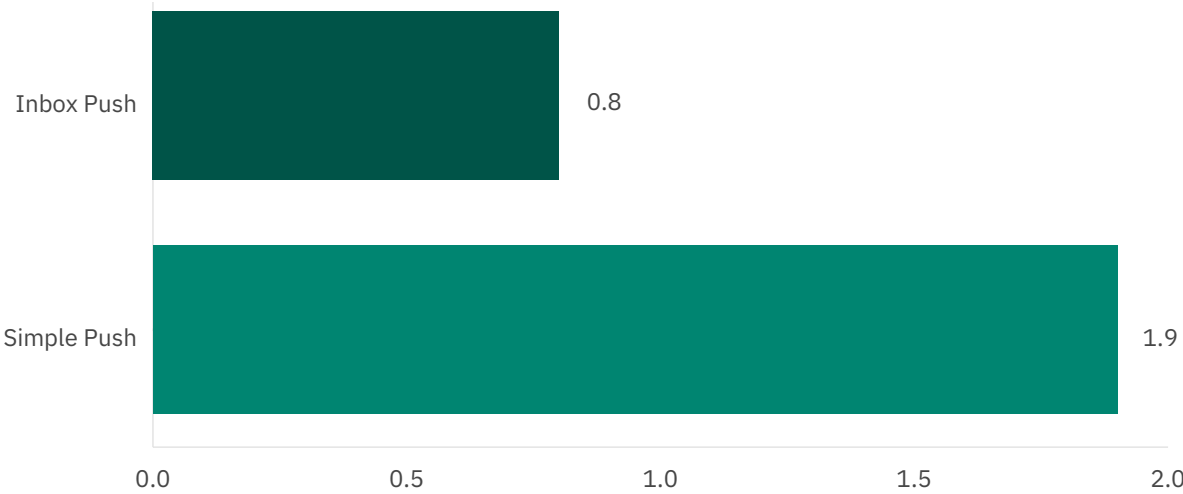
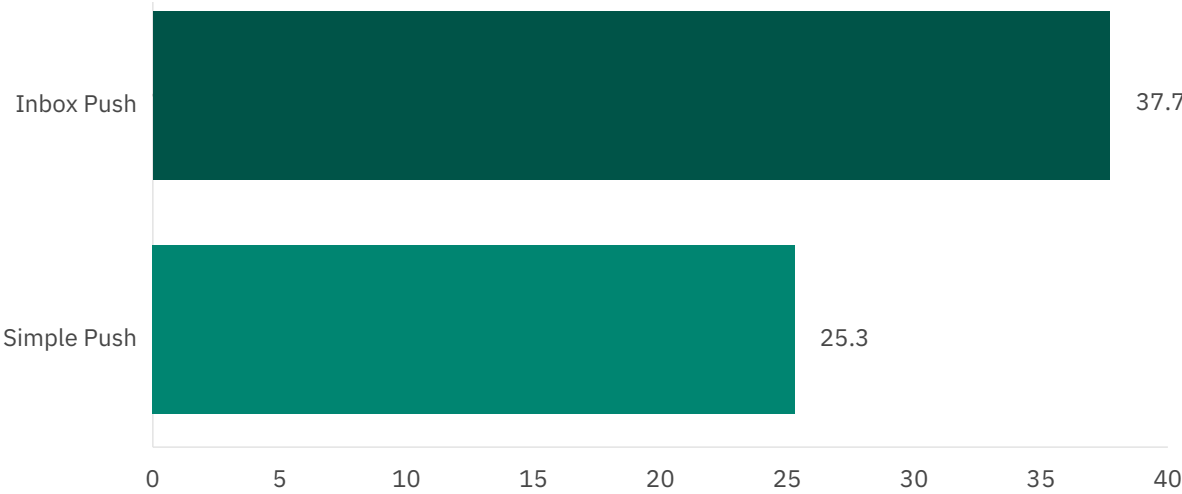
Observations

What is the optimum frequency to message subscribers and customers? This is a common question among marketers that is quite difficult to answer directly. While we were not able to analyze the number of SMS messages received on average per individual recipient, we were able to calculate the mean and median sends by brand per month.

While the actual values for SMS message sends in the chart of 321 (mean) and 84 (median) are not terribly important, their relative values provide insight. Much like email marketing, SMS marketers are taking a smarter approach by replacing a “batching and blasting” strategy with sending messages more frequently but to fewer recipients via more targeted triggered and segmented messaging.

Consider This: When creating your SMS messaging strategy, adopt a new, integrated multichannel mindset and do not focus solely on frequency. For example, ask yourselves: how can we use SMS to follow up with reminders for a webinar invite when a recipient has not responded to email?

Consumer trust expectations are greater with SMS versus email because of its immediacy on personal mobile devices. Transform your SMS campaign approach by creating greater value and adopting a multichannel mindset (and not using SMS as a means simply to blast your latest sale).



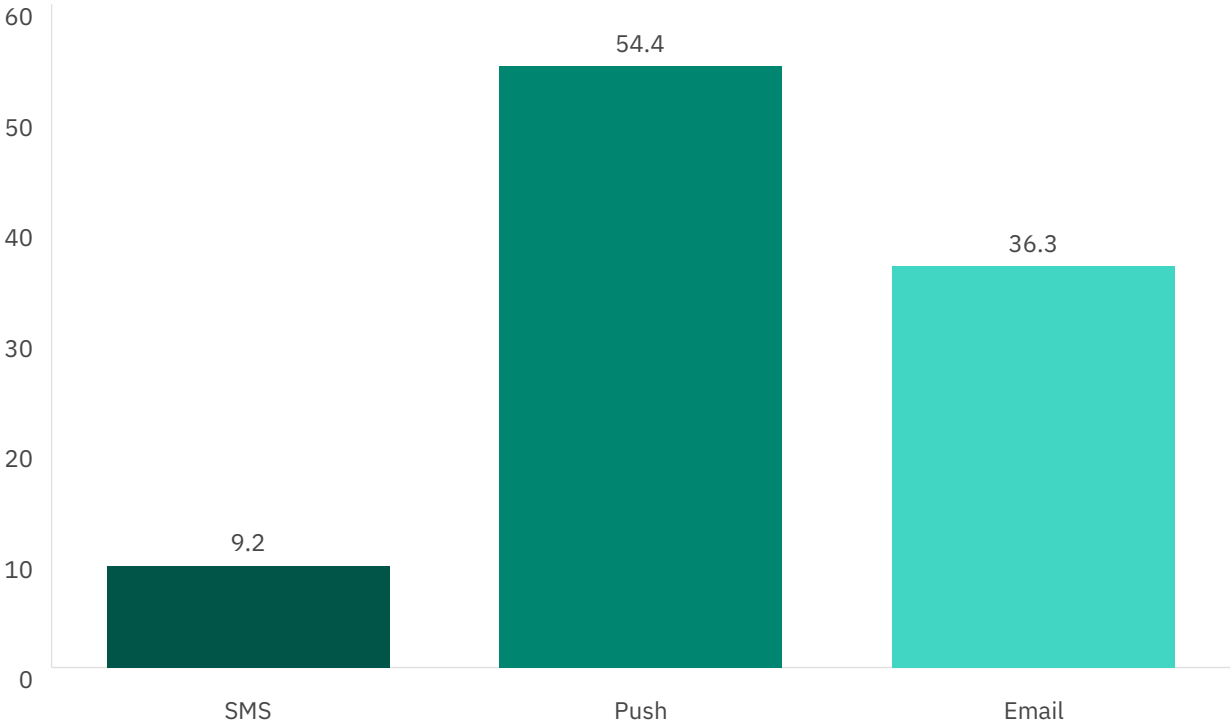
Mobile Push Open Rates

The mean inbox push open rate (app opens) was 37.7%, more than 12 percentage points higher than the 25.3% open rate for simple push messages. This is a material difference that suggests mobile app users are much more apt to open an inbox message than a simple push message.

URL Click-Through Rates

Mean URL click-through rates for both simple push and inbox messages are fairly low at 1.9% and 0.8% respectively. It is likely that simple push messages are clicked roughly twice as frequently as inbox messages because of their perceived greater sense of urgency. Inbox message links tend to be surrounded by more content which may lessen a recipient’s need to click to learn more.

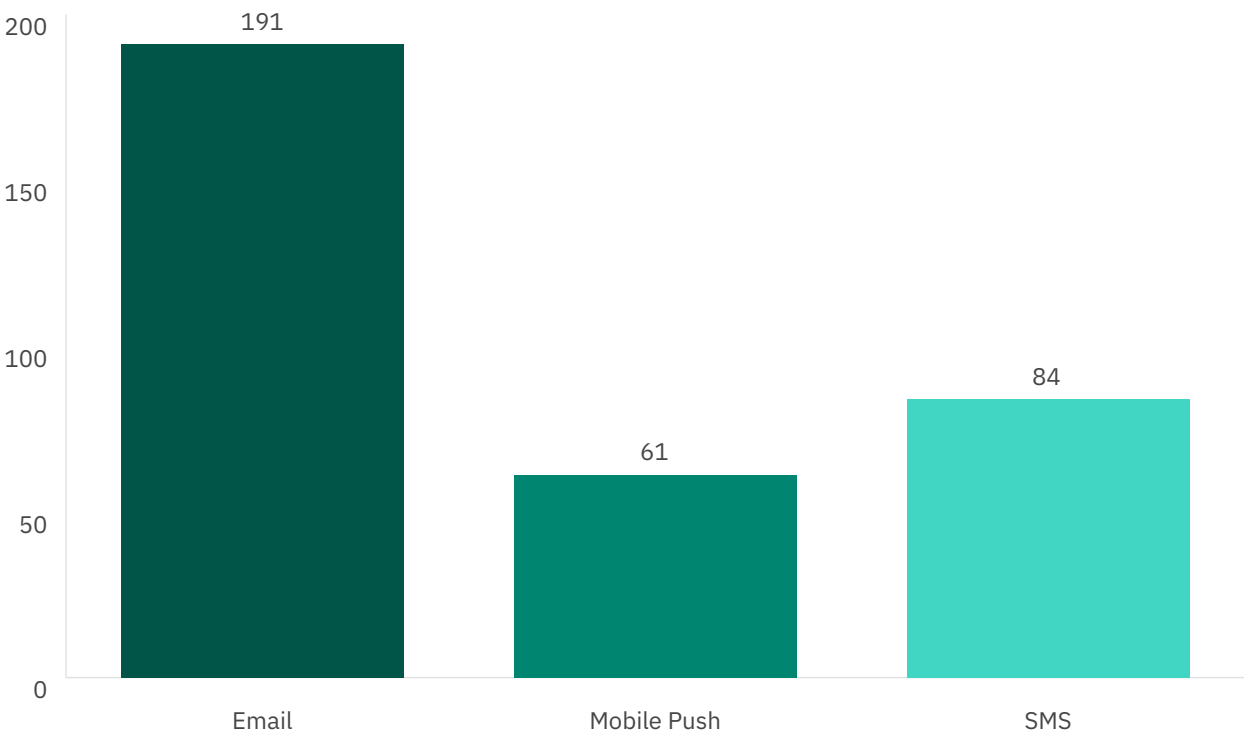
Consider This: While inbox messages are clicked less often than simple push messages, they are opened at a significantly higher rate. As such, consider focusing your inbox content on value-add and informative content whereas simple push messages might be fine to drive to a specific action or conversion.



Observations

We wanted to understand the relative volume amount brands send across different channels for those brands that deploy a combination of email, push and SMS. On average, brands send more to the mobile push channel (54.4% of total monthly volume) than via either email (36.3%) or SMS (9.2%). This result makes sense as push messages are perceived as the most service-oriented of the channels. Therefore, consumers may be more receptive to a higher cadence of messages via this channel versus email or SMS.

Consider This: When creating your messaging strategy, ensure you evaluate all available channels and consider the combined frequency impact on customers. If you observe higher opt outs and/or lower engagement than average benchmarks in one channel, consider shifting some of the content to another channel which may realize higher engagement.



Observations

What is the optimum number of email and mobile messages you should send per month? This is another one of those oft-asked but largely unanswerable questions. The response truly depends on business objectives, the nature of a brand’s business, customer interests and needs, the amount of relevant content you can produce, marketing resources, and more.

We wanted to see what the median number of messages Watson Marketing clients send across email, mobile push and SMS. The numbers in the chart include all types of messages: promotional, service-oriented and transactional.

What’s interesting is not the numbers themselves – which include brands with thousands of message sends per month – but rather the ratio between the channels. Not surprisingly, email reigns king on median monthly sends at more than 2-3 times that of push and SMS, likely due to the number of triggered message sends rather than prescheduled sends. While it is difficult to draw too much insight from these numbers, they do reinforce the observation that the majority of sent messages are done so via triggers.

Methodology, Glossary and Additional Resources



This study analyzed email and mobile marketing messages deployed by several thousand IBM Watson Marketing clients located in more than 40 countries during 2017.

For email marketing metrics, a broad set of email message types were included in the study — from promotional emails and content-based newsletters to notifications and transactional messages. SMS and push messages analyzed were primarily promotional in nature but also include transactional and customer service related notifications.

For this study, researchers analyzed various metrics from brands based in more than 40 countries. Email marketing metrics are reported as Overall and also (1) by 9 geographic regions: United States, Canada, United Kingdom & Ireland, Australia & New Zealand, Middle East & Africa, Continental Europe, Latin America & Caribbean, Asia Pacific, and India; and (2) by 20 different industries. Email client and device,

and engagement/read rate metrics are categorized into 7 geographic regions and 18 industries.

Reporting the Findings

Many (not all) charts feature statistics that include the mean, median, and top and bottom quartiles. The mean is the average of all numbers and is calculated by adding together all of the numbers in a set and then dividing the sum by the total count of numbers. The statistical median is the middle number in a sequence of numbers and is calculated by organizing each number in order by size; the number in the middle is the median.

The standard statistical definition of quartiles was used for this study. The “top quartile” is calculated by taking the median of all data *above* the overall median, and “bottom quartile” is the median of all data below the overall data median.



Glossary

Click-Through Rate (CTR)

Measures the percentage of email messages that drew at least one click. For this study, it is expressed as unique click-through rate, counting only one click per recipient. To calculate the click-through rate, divide the number of unique clicks by the number of delivered messages and multiply by 100.

Click To Open Rate (CTOR)

Measures the percentage of opened messages that recorded clicks. To calculate, divide the number of unique clicks by the number of opened messages and multiply by 100.

Engagement Metrics (“Read Rates”)

These measure the amount of time a recipient looks at a message. Although they can be classified in several ways, this study uses the following measurements:

- **Read:** 8 seconds or more
- **Skimmed:** 2 seconds or more but less than 8
- **Glanced:** Less than 2 seconds

Hard Bounce

A message that generates a permanent delivery failure because the recipient’s address doesn’t exist or the account was closed.

Hard Bounce Rate

The percentage of sent messages that failed (bounced) because the address doesn’t exist or the account was closed. To calculate, divide the total number of bounced messages by the total number of emails sent, and multiply by 100.

Holiday period

For this study, the defined holiday period began on November 22, 2017 and ended on New Year’s Eve, December 31, 2017.

Inbox Message Opens

The number of times that users open a message in a mobile app’s inbox (either by clicking a simple notification or navigating to the message from the inbox).

Open

“Open” refers to an HTML email message whose viewing is recorded by a clear 1 X 1 pixel image.

When a message is opened and images are enabled, the image calls the server and the message is then counted as an open. The number of opens counted for this research include both this direct reporting and an “implied open” on text messages that recorded a click on any link in the message or an HTML message whose viewer did not enable images but clicked on a link.

Open Rate (Unique)

The unique open rate measures one open per recipient and is expressed as a percentage of the total number of delivered email messages. To calculate the rate, divide the number of unique opens by the total number of delivered emails, and then multiply by 100 to display the percentage.

Simple Push (app) Opens

The number of times that users click on a simple notification to trigger the “openApp” action on a mobile device such as a smart phone.

Spam Complaint

A complaint registered by a recipient who indicates the email message is unwanted, whether it fits the classic definition of “spam” as an unsolicited email



or simply any message the recipient no longer wants to receive. The majority of spam complaints are received via a direct message via a “feedback” loop with an ISP.

Spam Complaint Rate

The percentage of delivered email messages that generate spam complaints. To calculate, divide the total number of spam complaints by delivered emails and multiply by 100.

Transactional Message

A message that is triggered by a customer or prospect action such as an order/subscription confirmation or shipping update. Transactional messages can be sent at any time of day, do not require opt in, and do not need to provide a call to action (CTA).

Unsubscribe Rate

The percentage of delivered email messages that generates unsubscribe requests. To calculate, divide the number of unsubscribe requests received by

delivered emails and multiply by 100.

URL Clicks - Inbox Message

The number of times that users click an inbox message in a mobile app to trigger the “url” action.

Industry Category Definitions

By segmenting the benchmark data into various industry segments, we hope that this report provides greater value in enabling comparisons to like-kind companies. The categories range from fairly narrow to broader segments that combine related but different company types.

For each segment, a minimum number of companies was required to create a segment to ensure reliable averages and to minimize the chance that a few outlying companies would skew the averages higher or lower.

Finally, as always, we believe that while these benchmarks can provide a good starting point,

always benchmark against your own program – previous years, types of emails, sister brands, and more – so that you’re performing true apples-to-apples comparisons.

Automotive & Transportation

Auto manufacturers, suppliers and dealers; airlines.

Banks & Financial Services

Banks, financial/asset management, stock brokerages.

Computer Hardware & Telecommunications

Computer hardware and telecommunications manufacturing, telecommunications providers.

Computer Software & Online Services

Business and consumer software; online services.

Consumer Products

Manufacturers of consumer products, including those that also sell direct to consumer, but primarily their own products.

Consumer Services

Personal services (e.g. spa, optometry), home, and miscellaneous services.

Consider This: Compare your organization to more than one segment in an attempt to benchmark against similar senders as well as the industry your organization falls under.



Corporate Services

Accounting, legal and consulting firms; miscellaneous business services.

Energy & Environmental

Energy companies and utilities.

Food & Beverage

Food and beverage producers and distributors; restaurant chains.

Hospitals, Healthcare & Biotech

Hospitals, health management services and biotech companies.

Industrial Products

Industrial, chemical and forest products.

Insurance

Providers of all types of insurance products.

Leisure, Sports & Recreation

Amusement parks, sports teams, casinos and gaming.

Lodging, Travel Agencies & Services

Hotels, travel agencies and cruise lines.

Marketing & Advertising

Advertising and marketing agencies. Note: This category includes messages sent by agencies both on the behalf of their clients and to market their own business.

Media & Publishing

Magazine, newspaper and online media and publishers.

Nonprofits, Associations & Government

Nonprofit organizations, charities and trusts, associations and government entities.

Real Estate, Construction & Building Products

Commercial, residential and multi-family real estate and property management companies; construction; and organizations that manufacture building products.

Retail & Ecommerce

Traditional retailers and online retailers and ecommerce companies, whether B2C or B2B.

Schools & Education

Private and public schools, universities and technical training organizations.

Additional Resources

- [Watson Marketing Blog](#)
- [Watson Campaign Automation Key Features](#)
- [WCA Product Home Page](#)
- [Forrester Wave™: Cross Channel Campaign Management, Q1 2018](#)
- [April 2018 Gartner Magic Quadrant for Multichannel Marketing Hubs](#)

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Last Thing...

You have the data – now put it into action. Schedule a 30-minute consultation and learn how to build smarter marketing campaigns.

Schedule a consultation

Watson Marketing

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