**GetResponse**

# Email Marketing
# & Marketing Automation
# Excellence 2017

Global benchmarking research to support businesses
in improving their email, marketing automation,
and content marketing ROI

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#EmailExcellence2017

Research in collaboration with GetResponse, Content Marketing Institute, and Holistic Email Marketing

**GetResponse**          **Smart Insights**          **CONTENT MARKETING INSTITUTE**          **HOLISTIC EMAIL MARKETING**

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# Executive Summary

## State of email marketing 2017

### Global benchmarking research to support email marketing excellence

This research report was created by SmartInsights.com, publishers of digital marketing advice, and GetResponse, an all-in-one online marketing platform, in partnership with Holistic Email Marketing and Content Marketing Institute. It also includes commentary from email marketing experts who share their perspective on the research findings. Its purpose is to help marketers improve the effectiveness of their email marketing.

In the report, we assess the current state of email marketing based on a major research project surveying 2,510 email marketers around the world from a range of business sizes and sectors. The breakdown of marketers involved in different forms of email marketing was: 41.8% business-to-consumer (B2C) marketing, 19.1% business-to-business (B2B) marketing (B2B), with 39.1% managing both B2C and B2B. As you compare the techniques used by other businesses, you will be able to identify areas for improvement.

# Research findings:

## 1. A wide range of email marketing sophistication.

The study assesses email marketing programs on a scale of newbie, beginner, intermediate, advanced, and expert. We compare the best practices and features businesses use in their email marketing compared to personal knowledge of email marketing.

## 2. Email is rated effective compared to other digital channels.

In Section 1, we present the views of respondents on the effectiveness of email marketing. Email marketing is a clear winner, with 53.6% of respondents rating email marketing as excellent or good – higher than any other digital channel.

## 3. Investment in email marketing is growing in many businesses.

Over half of the businesses (58%) are planning to increase their email marketing budget, with only 7.5% planning to decrease their budget. Over one-quarter (35%) are satisfied with their current investment level and want their email marketing budget to remain the same in the year ahead.

## 4. Email marketing sophistication is limited in many businesses.

In Section 2, we assess best practices in seven areas recommended for strategic benchmarking of email marketing. Over half of marketers use integrated "beyond the email click" tracking from their email marketing service to track website marketing outcomes such as mid-funnel metrics like leads (31%) or lower funnel metrics like sales (21%). This is an improvement on previous surveys, but still suggests many businesses could improve tracking. More shocking is the lack of targeting, with half (50%) not using any targeting whatsoever, and less than a third (29%) using basic segmentation for targeting.

## 5. The opportunity of marketing automation is not being delivered upon in many businesses.

In Section 3, we review the value and use of automation. While the top 27.5% of companies are positive that they are using a good range of features, 17% are not using marketing automation at all and over half (54%) of businesses are at a level of moderate use of automation or below, so you can look at this as a great opportunity to improve.

## 6. Integrating content marketing and email marketing.

Despite the popularity of content marketing, responses discussed in section 4 show that a relatively small proportion of marketers are planning their use of it with only one third (35%) having a long-term strategic approach to content planning, creation, and distribution. Many businesses (39%) simply source content on an ad-hoc basis as they use it, suggesting the approach isn't strategic. Likewise, with measurement, less than one-third assess and optimize the effectiveness of different content types used within the email and just 17% can measure the ROI of each content asset and value of each email sent.

# Foreword from GetResponse

Sometime in late 1972, a computer engineer named Ray Tomlison sent the very first email. Although the message itself didn't make it to the history books, the "@" sign became a symbol of a new era for personal communication.

By the end of 2019, it's estimated that the number of email users will exceed 2.9 billion, meaning that over one-third of the world's population will be using email. In recent years, email has been predicted to become obsolete multiple times despite its continuous growth.

With the development of social media and instant-messaging apps email's original role as a medium for personal communication between family and friends has certainly diminished. At the same time, its role as a medium for exchanging information between brands and customers has grown much stronger.

We've been interested in the use of email ever since GetResponse was founded in 1998. How do brands use email to deliver value to their customers? Do they tailor the message to the readers' preferences? How do they measure the effectiveness of their campaigns? These are some of the questions we've been asking ourselves for quite some time.

In order to answer these questions, some time ago with our research partner Smart Insights we've conducted a study and published it under the name of The State of Email Marketing 2015.

Enthusiastic about our previous findings, this year, we've decided to increase the scope of the research, by involving more people in the process and looking at new areas such as: *Has the use of email changed since marketing automation technology became more available even for small and medium businesses?* or *How do marketers integrate email into their content marketing efforts?*

You'll see what we've learned when you read this report. Having surveyed more than 2,500 marketers, we're confident that these findings will benefit your everyday work and will help you make better business decisions – especially when working on your email, marketing automation, and content marketing campaigns.

We hope you'll enjoy reading this report – at least as much as we enjoyed learning other fellow marketers' insights.

*Michał Leszczyński*

**Michał Leszczyński**
Content Marketing Manager, GetResponse

Section 1

# INTRODUCTION

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From my work in training and consulting marketers, I had a strong suspicion that many businesses weren't taking full advantage of the power of email marketing. So I was interested when GetResponse approached us to team up to create a large-scale, global research report summarizing the state of email marketing and highlighting best practices.

*Dr. Dave Chaffey*

# An introduction to the report

## by Dr. Dave Chaffey

### Smart Insights

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**Dr. Dave Chaffey**
CEO and co-founder of Smart Insights

Since I help companies improve their online marketing, I pay close attention to best practices in email marketing and marketing automation. The reason? Email marketing remains one of the most powerful marketing tools available to all businesses. It's easy to start using it both as a lead-nurturing tool to support customer acquisition and as a customer communication tool to develop customer relationships and loyalty.

I read "The One-to-One Future", by Don Peppers and Martha Rogers at a time when businesses first started exploring the potential of online marketing. It was clear that email was the easiest way for businesses to deliver on their promise of the power of direct, personalized, relevant communication. However, this potential power of email marketing was only going to be delivered if businesses used the functionality to segment and target their audience.

Over ten years ago, I created one of the first training workshops on email marketing in Europe and wrote "Total Email Marketing", which explored best practices for effective email marketing. Through designing the research and editing this report, I'm delighted to share the state of the art of email marketing. This report will help marketers review and improve their approach, as part of the Smart Insights mission to help marketers plan, manage, and optimize their digital marketing.

# About this global benchmarking report on the state of email marketing

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Although email marketing is well established and popular, it remains a complex digital marketing technique to master, particularly with the introduction of powerful marketing automation features. The devil is in the detail.

From my work in training and consulting marketers, I had a strong suspicion that many businesses weren't taking full advantage of the power of email marketing. So I was interested when GetResponse approached us to team up to create a large-scale, global research report summarizing the state of email marketing and highlighting best practices.

To get marketers' opinions we involved Smart Insights members, GetResponse customers, and Content Marketing Institute subscribers around the world to create a valuable global benchmarking report. Our goal was to provide actionable insights that would help businesses compare their email marketing to others and take steps to improve it.

The aim was to go beyond questions about the adoption of various email marketing techniques; we wanted to provide scoring. And for respondents who were GetResponse customers, we wanted to (anonymously) compare the results they were achieving against benchmarks.

I'm delighted to share the results of this unique email marketing benchmarking project, thanks to the involvement of many marketers from around the world.
A big "thank you" if you shared your email marketing experiences!

Now more than ever, organizations need a sound process to keep up with ever-changing best practices and take full advantage of email marketing. So we hope this report helps you evaluate your approach, so you can plan, manage, and optimize your email marketing!

## Report goals

The aim of the research is to help email marketers and their businesses:

### Review

Review their strategic approach to email marketing by comparing their use of email marketing techniques and features to best practices

### Learn

Learn best practice email marketing techniques by assessing capabilities

### Assess

Assess the opportunity for marketing automation

### Compare

Compare techniques for better integrating content marketing with marketing automation

# Who is the report for?

We've aimed this report at two main audiences:

| 1. Managers responsible for digital marketing | 2. Email marketing & marketing automation specialists. |
|---|---|
| For this audience, we want to highlight the importance of email marketing and marketing automation today compared to other digital marketing channels and the success factors for managing email marketing. This report will enable these leaders to have detailed discussions with email specialists to improve the contribution of marketing automation to their communications goals. | Marketers with hands-on responsibility for email marketing and automation need to know which optimization techniques to focus on to improve results. Agencies and consultants who advise companies and implement marketing automation programs will also find this report useful. |

# How is the report structured?

In the first part of the report, we compare email marketing to other digital marketing channels. Next, we break email marketing down into various activities that need to be managed to improve results, and we assess the current level of use of these best practices. In the third section, we drill down to explore adoption of marketing automation and in the fourth section look at how email marketing is integrated with content marketing.

# About the survey participants

By combining the audiences of Smart Insights, GetResponse, and the Content Marketing Institute, we hoped to create one of the largest-ever reviews of the state of email marketing. This research would be the basis of a robust report in which we would break down the results by industry sectors and levels of email marketing sophistication. Typically, research reports have responses of a few hundred participants, but we were delighted to have over two thousand participants.

Many thanks, if you were one of the 2,510 participants who took time out to share their experiences and current use of email marketing!

Due to the scale of the sample, this report is a global survey representing more than 100 countries, from Albania to Zimbabwe. The breakdown of marketers involved in different forms of email marketing was: 41.8% business-to-consumer (B2C) marketing, 19.1% business-to-business (B2B) marketing, with 39.1% managing both B2C and B2B.

You can check out further details of the methodology and sample breakdown in the appendix.

## About Smart Insights

Smart Insights provides actionable learning resources to help businesses improve their digital marketing results. More than 150,000 Smart Insights Basic members use our blog, sample marketing templates, and weekly Digital Marketing Essentials newsletter to follow best practices and keep up to date with the developments that matter in digital marketing.

Thousands of Business and Individual Expert members from over 100 countries use our planning and strategy templates, guides, and video courses to plan, manage and optimize their marketing using the Smart Insights RACE Planning framework. Resources are grouped in 20 different toolkits covering key techniques to increase online sales including content marketing, email marketing and marketing automation, digital experiences, and social media marketing.

**Smart Insights**

**www.smartinsights.com**

# Recommended resources

Strategy development and planning templates

**Smart Insights have developed a series of tools for Expert members to help them plan:**

- Digital strategy toolkit. This template contains a complete workbook for creating a digital marketing strategy to Reach-Act-Convert and Engage your audience.

- 7-Step Digital Strategy guide and course. Step-by-step guidance.

- Example digital marketing plans. A sample online marketing plan and a blank template for using the Smart Insights RACE Planning framework.

**Learn more about our digital marketing strategy toolkit »**

## About the report author

Dr. Dave Chaffey is CEO and co-founder of Smart Insights, the management advice site for digital marketers. He is the author of 5 bestselling books on ecommerce, including "Digital Marketing: Strategy, Implementation and Practice" and "Total Email Marketing". In 2004, he was recognized by the Chartered Institute of Marketing as one of 50 marketing "gurus" worldwide who have helped shape the future of marketing. In 2015, he was rated as the top influencer on social media for marketing and advertising in a top 50 UK compilation by Brand Republic (a portal of publisher Haymarket brands Campaign, Marketing and Media Week).

# About GetResponse

Today, over 350,000 customers in 182 countries trust the GetResponse online marketing platform. With nearly 20 years of experience, we deliver excellent digital marketing solutions, available in 22 different languages. Our company operates globally with offices in Poland, Canada, Malaysia, and Russia. We have over 300 passionate professionals on board. Together we create inspiring technologies that empower entrepreneurs and help them grow their businesses.

GetResponse offers a complete suite of simple yet powerful features, scaled and customized for small and large companies alike. Our tools are designed for organizations that are focused on implementing high impact marketing campaigns that drive effectiveness and overall ROI.

The GetResponse online campaign management platform helps to design, implement, and track digital marketing activities. Companies can do that using marketing automation, autoresponders, webinars, landing pages, advanced analytics, and over 50 other easy-yet-powerful features.

If you're ready to improve your approach to marketing, try GetResponse free for 30 days.

Try GetResponse for free

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# About Holistic Email Marketing

Holistic Email Marketing is an email marketing consultancy. Spearheaded by Kath Pay, a recognised industry thought leader, our consultants are some of the most experienced and successful email marketers in the industry, renowned for their passion and vision for relationship-driven, holistic email marketing strategies.

Holistic Email Marketing helps companies across diverse industries to better achieve their email marketing objectives. We believe that email marketing should be based upon the customer journey, its touch points and upon the customer insights gained from data mining.

We believe that everything that happens before and after your email, affects your results. That's why we developed *The Holistic Approach*.

The Holistic Approach is about creating conversion-focused, customer-centric personalised marketing strategies, with email at the heart. And through the art of persuasion, marketing automation and cross-channel learnings, we craft a journey that converts.

So, your customers meet their goal, and you meet yours.

www.holisticemailmarketing.com

# About Content Marketing Institute

Content Marketing Institute is the leading global content marketing education and training organization, teaching enterprise brands how to attract and retain customers through compelling, multi-channel storytelling.

CMI's Content Marketing World event, the largest content marketing-focused event, is held every September in Cleveland, Ohio, USA, and the Intelligent Content Conference event is held every spring. CMI publishes the bi-monthly magazine Chief Content Officer, and provides strategic consulting and content marketing research for some of the best-known brands in the world. CMI, a UBM company, is a 2012, 2013, 2014 and 2015 Inc. 500 company.

www.contentmarketinginstitute.com

# HOW EFFECTIVE IS EMAIL MARKETING TODAY?

## How email marketing compares to other channels

Since email predates the web, it is one of the earliest digital marketing tools. It remains popular today because it's available to businesses of all sizes. Plus it's easy to get started by building a list using inbound marketing and then communicating with your subscribers using autoresponders, welcome emails, and e-newsletters. So, our investigation of the state of email marketing in 2017 starts with a top-level comparison of email marketing versus other digital marketing techniques.

## How marketers rate email marketing against other digital marketing techniques

In the introduction, we wrote about the potential and power of email marketing. Do our respondents agree with us? We asked for their views on the effectiveness of various digital media channels and offline media. The results deliver an emphatic "Yes!" For the most part, marketers agree about the potential and power of email marketing. When sorted by effectiveness ratings of excellent and good, email marketing is the clear winner with 53.6% rating email marketing positively.

### Rating of effectiveness of digital marketing channels

| Channel | Very poor | Poor | Average | Good | Excellent |
|---|---|---|---|---|---|
| Email marketing | 5.8% | 10.7% | 29.8% | 35.4% | 18.2% |
| Social media marketing | 6.6% | 12.3% | 30.3% | 33.5% | 17.4% |
| Search engine optimization (SEO) | 7.5% | 12.3% | 35.2% | 31.3% | 13.7% |
| Social PPC (paid advertising in Facebook, Twitter, LinkedIn etc.) | 8.4% | 14.8% | 35.1% | 30.0% | 11.6% |
| Content marketing | 7.5% | 11.7% | 37.7% | 32.2% | 10.9% |
| Direct mail | 14.9% | 18.4% | 33.7% | 23.0% | 9.9% |
| Affiliate marketing | 11.7% | 16.5% | 39.0% | 23.5% | 9.3% |
| Search Engine/Pay-per-click advertising | 10.2% | 17% | 38.5% | 25.2% | 9.1% |
| Display advertising | 12.9% | 20.4% | 38.4% | 20.3% | 7.9% |

Legend: Very poor, Poor, Average, Good, Excellent

It's interesting to see organic social media marketing is close behind in second place with paid social popular, too. If we had asked this question five years ago, it's likely SEO would have been in first or second place. Still, SEO remains highly rated for effectiveness alongside content marketing, which we see as the fuel that powers SEO, social marketing, and email marketing. In this report we explore the contribution of content marketing and integration with email marketing in more detail in Part 4.
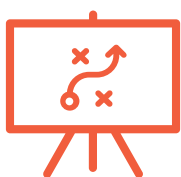
**STRATEGY RECOMMENDATION:**
Develop an integrated strategy for content and customer engagement.

We often hear marketers say they need an SEO/social/email marketing strategy (delete as applicable!) while a focus on optimization of each is needed, we recommend an integrated approach to content marketing, to engage customers and support the goals of the business across the customer lifecycle.

This visual shows how many marketing activities today are supported by content marketing, showing the importance of having a lifecycle engagement strategy.
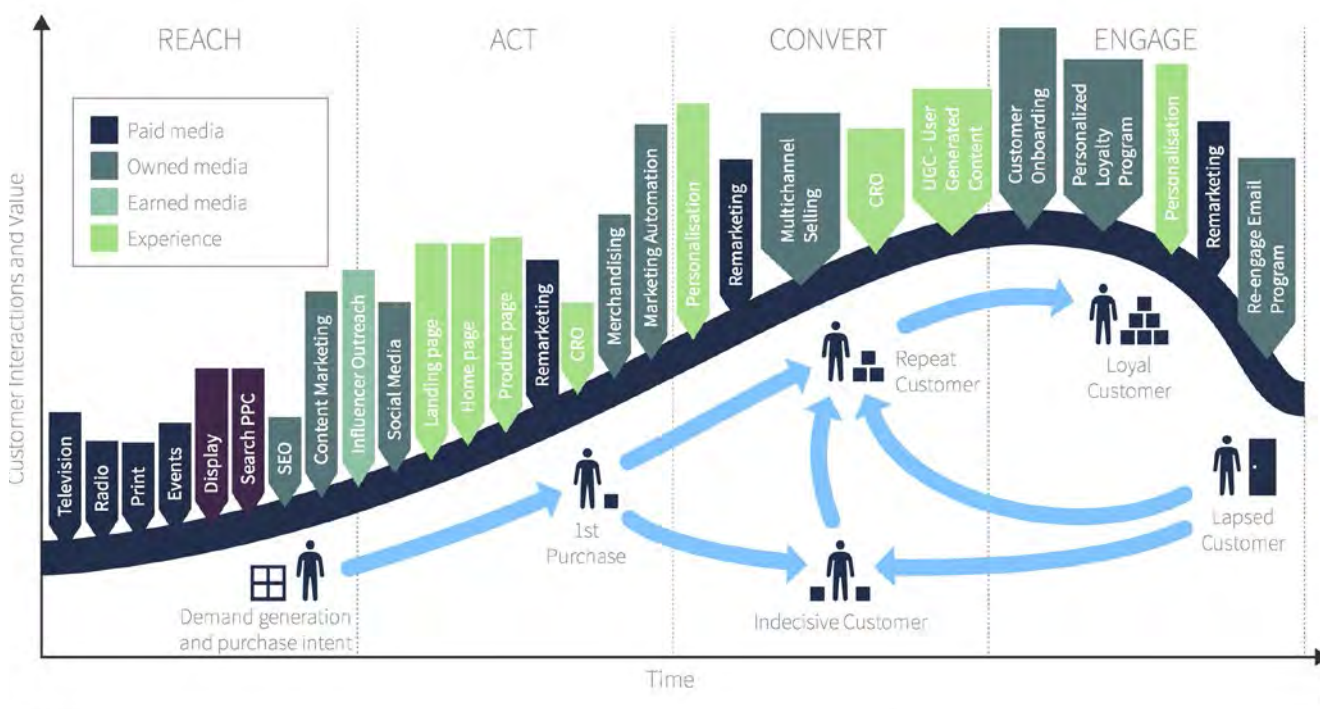
## Key benefits of email marketing

We can see that many marketers rate email marketing highly. Which benefits are they trying to achieve as they seek to improve their email marketing? We answered this question in our first benchmarking report, but didn't repeat the question this time, so we could explore other insights, since the answer and benefits are evergreen.

When asked about the number-one benefit, we expected "more sales" to rate high, yet, in fact it was second with generating more leads the highest-rated benefit. And identifying better-quality leads was also highly rated by many. This demonstrates that companies want to use marketing automation (with nurture sequences, content, offers, newsletters, and other types of campaigns) to engage contacts and develop qualified leads at the top and mid funnel as well as deeper in the funnel, to convert to sale through automated emails such as abandoned cart campaigns or following up when someone views a product on a website.

## Marketer ratings of the top benefit of email marketing



- ● Generating more leads
- ● Improved sales
- ● Improved conversion rates
- ● Reduced marketing costs
- ● Identifying better-quality leads
- ● Integrating with other media to boost response
- ● Other
- ● Shorter sales cycles

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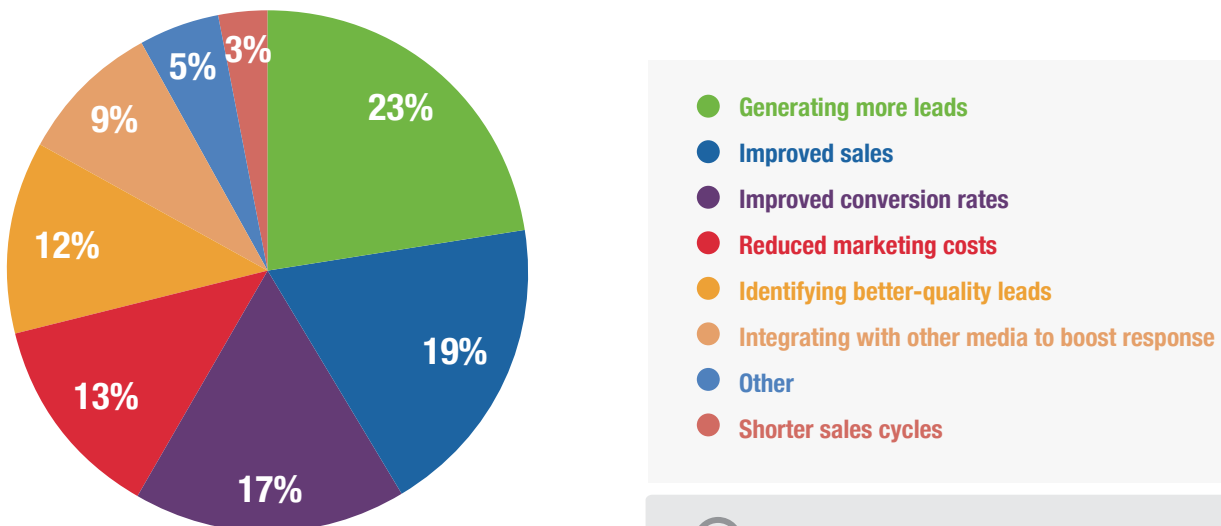
Respondents rated improving sales and conversion rates next highest. These go together since increasing conversion rates will lead directly to improved sales. Other benefits, such as media integration, reducing cost and sales cycle time, were unsurprisingly rated lower, but are seen as positive by many companies.

## Budget investment in email marketing

We found that many marketers view email marketing as a positive investment in 2017. Over half of the businesses (58%) are planning to increase their email marketing budget, with just 7.5% stating that their investment will decrease. Just over one-third (35%) are satisfied with their current investment level and want their email budget to remain the same in the year ahead.

### Changes in channel budget during 2017



Legend: Increase | Stay the same | Decrease
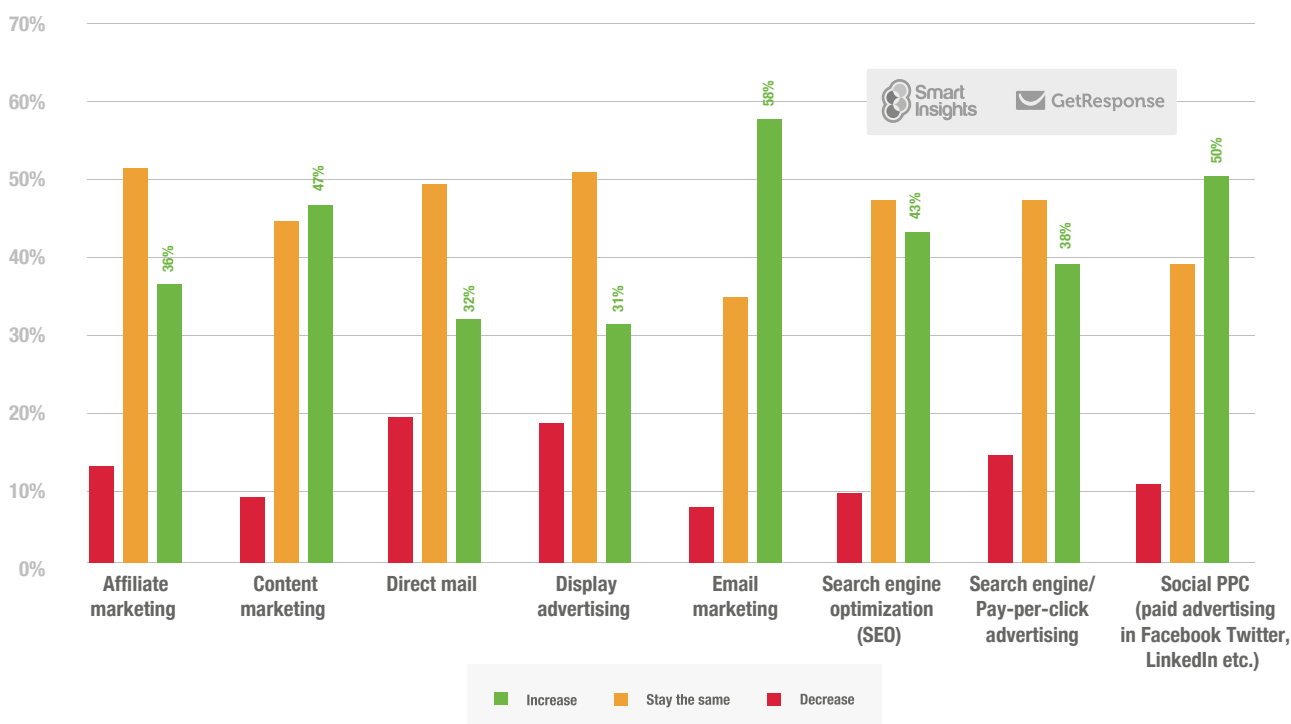
# How advanced is your email marketing?

To improve your email marketing, it helps to think through the various levers you can pull to improve response and derive value from your subscriber list. Smart Insights recommends using the simple mnemonic "CRITICAL" to review how you can improve your email marketing.

## The CRITICAL factors for email marketing:

### CONVERSATION

For today's marketing, email works best when it prompts a dialogue and encourages social media interactions, so it's not just a push channel.

### RELEVANCE
(including targeting)

We need to ensure the offer and email creative meet the needs of the recipients. Is a single message sent to all prospects or customers on the list? Or are emails sent to the various list segments with tailored creative, incentive, and copy? Do some recipients view email as spam?

### INCENTIVE
(or offer)

The recipient looks for the "What's in it for me" (WIFM) factor. What benefits do recipients gain from clicking hyperlink(s) in the email?

### TIMING

Timing refers to when the email is received – time of day, day of week, day of month, and season of year – and how it relates to events or other campaign elements. It also relates to the frequency of email communications.

## INTEGRATION

Are the email campaigns part of your integrated marketing communications? Here are some questions to ask. Are the creative and copy consistent with my brand? Do the messages reinforce other communications? Does the timing of the email campaign fit with offline communications?

## CREATIVE & COPY

This refers to the structure, style, and explanation of the offer, along with the number and location of hyperlinks and other calls-to-action in the email. These and other factors, such as the sender reputation, affect the delivery of email into the inbox.

## ATTRIBUTES
(of the email)

The message headers such as the subject line, from address, and format (HTML or text) have all been written about at length.

## LANDING PAGE
(or microsite)

The page(s) reached after the recipient clicks on a link in the email. Typically, on click-through, the recipient is presented with a form for a profile or to learn more about them. Designing the page so the form is easy to complete is sometimes neglected but can affect the overall success of the campaign.

# Reviewing your strategic email marketing capabilities

As you can see, the CRITICAL factors cover nearly all the issues you need to think about as you prepare your email campaigns to make them work harder for you.

To make this research a more structured, strategic review of email marketing capabilities, we started with the CRITICAL factors and identified email activities that marketers need to manage for success.

These appear in the visual below to help you grade your approach to email and marketing automation.

## EMAIL MARKETING AND MARKETING AUTOMATION EXCELLENCE

Take your Email marketing to the next level with our capability assessment. Use our visual checklist to audit how well your business or clients are exploiting their email marketing and then plan how to take it to the next level.

Smart Insights

| | Initial "Pray and spray" ★☆☆☆☆ | Managed "Targeted emailing" ★★☆☆☆ | Defined "Starting to automate" ★★★☆☆ | Quantified "Starting to integrate" ★★★★☆ | Optimised "Integrated lifecycle targeting" ★★★★★ |
|---|---|---|---|---|---|
| Email capabilities and evaluation | Simple ESP Response tracking | Regular report of opens/ clicks | 'Beyond the click' tracking Segment tracking | Value reporting Hurdle rates and activity levels | Response data > CRM system/warehouse |
| List quality | Not managed | List-building options increased | List quality improved | Reactivation and removal | Preference centres |
| Targeting (relevance) | None: 'Pray and Spray' | Demographics | Basic triggers | Full lifecycle sequences | Additional sequences added |
| Proposition and communications strategy | Newsletter and Eblasts | Increased frequency | Content marketing integration | Social integration | Optimised frequency |
| Creative and templates | Simple headers | Multiple template | Dynamic content | Video review Mobile optimised | Advanced techniques |
| Delivery | Not reviewed | Reported | Reported by ESP | Feedback loops and delivery service | Continuous monitoring |
| Optimisation | None | Experiments with different offers/subjects | Structured offer/subject testing | Layout reviews AB testing | Multivariate testing |

## STRATEGY RECOMMENDATION:

Audit your email marketing capabilities
and make changes to improve them.

By completing audits, you can be more strategic in your digital marketing, set
priorities, and develop a roadmap for improving processes or introducing new digital
technologies and communications.

By assessing your current level, you can then identify the gap between where you are
now and where you need to be, to help prioritize which email marketing techniques
need work.

**All members of Smart Insights can download a free larger version of this capability
chart, and charts for over other digital marketing channels here.**

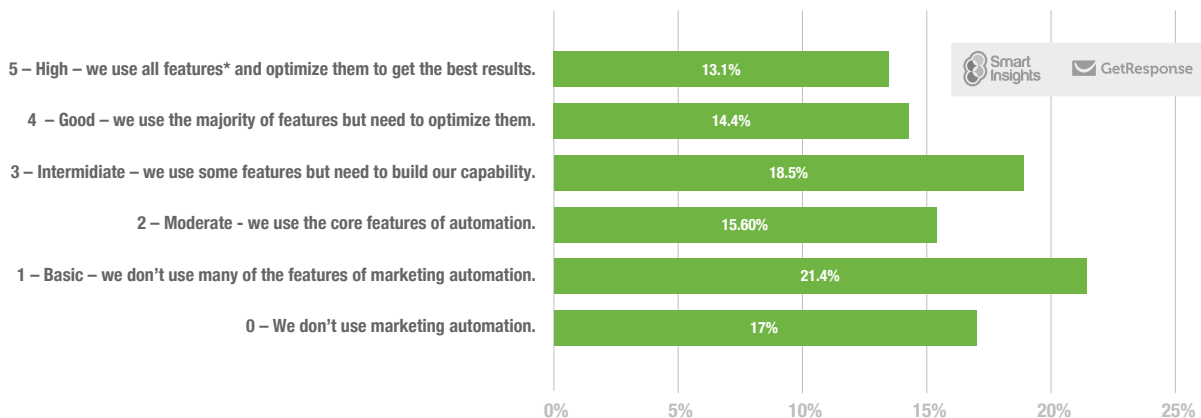## Results: The state of email marketing capabilities

In this section, we analyze the current use of email and marketing automation best practices by reviewing some of the seven key capabilities shown in the benchmarking visual above. To understand the overall response and adoption of various email marketing techniques, we asked businesses about their use of a range of email marketing techniques, from basic to advanced.

The four most important techniques for driving email marketing and automation ROI we cover in this section are:

1. **Evaluation and tracking**
2. **Targeting**
3. **Communications strategy, including frequency**
4. **Testing and optimization**

To help you compare your overall email and marketing automation capabilities with other marketers, we asked business to rate their marketing automation on a scale of 1 to 5. The results show a fairly even mix of responses. Kudos to the top 27.5% of companies at a level of good or high! If your capability is in the lower categories, at least you're not alone, 17% are not using marketing automation at all and over half (54%) of businesses are at a level of moderate use of automation or below, so you can look at this as a great opportunity to improve.

### Overall effectiveness of marketing automation

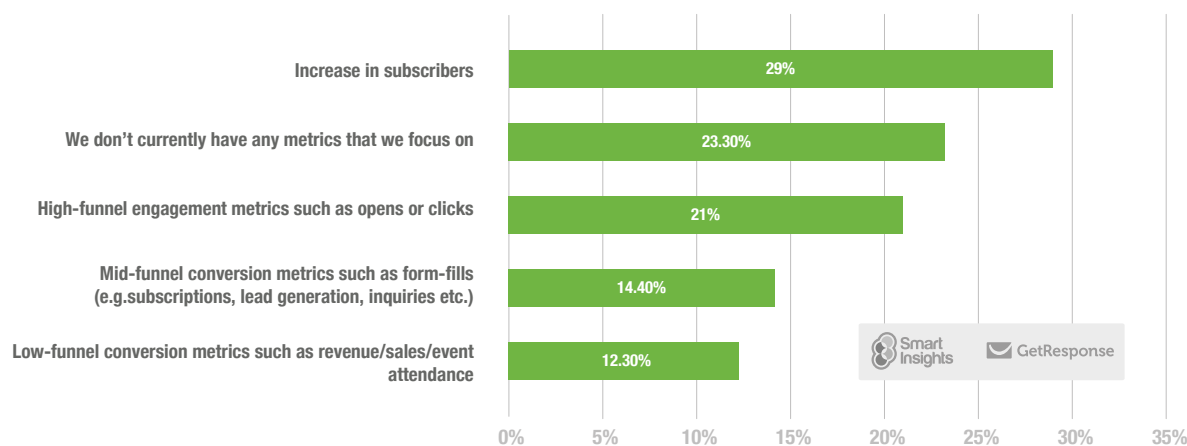| | % |
|---|---|
| 5 – High – we use all features* and optimize them to get the best results. | 13.1% |
| 4 – Good – we use the majority of features but need to optimize them. | 14.4% |
| 3 – Intermidiate – we use some features but need to build our capability. | 18.5% |
| 2 – Moderate - we use the core features of automation. | 15.60% |
| 1 – Basic – we don't use many of the features of marketing automation. | 21.4% |
| 0 – We don't use marketing automation. | 17% |

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# Capability 1: Evaluation and measurement of effectiveness

Tracking and evaluation are the foundations of reviewing and improving email marketing in any business, so that's where we started our review of capabilities.

We asked email marketers to select the single primary metric used to evaluate email marketing. We were interested to see how many marketers go beyond the high-funnel engagement metrics such as volume of opens and clicks, to review measures of quality of response, including mid-funnel conversion metrics such as form-fills for lead-generation or lower funnel value of response such as sales.

**Primary email marketing metric used**

| Metric | Percentage |
|---|---|
| Increase in subscribers | 29% |
| We don't currently have any metrics that we focus on | 23.30% |
| High-funnel engagement metrics such as opens or clicks | 21% |
| Mid-funnel conversion metrics such as form-fills (e.g.subscriptions, lead generation, inquiries etc.) | 14.40% |
| Low-funnel conversion metrics such as revenue/sales/event attendance | 12.30% |

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Responses show that relatively few marketers (less than 15%) use mid or low funnel metrics as their primary metrics, so they are unable to clearly see the business outcome of their email marketing beyond the email click. More shockingly still, nearly one quarter claim not to have a method of reporting metrics, so they are missing out on data-driven improvements to their email marketing. It was a surprise that the most popular metric was increase in subscribers, since this isn't a direct result of email marketing, although it is a success factor for gaining more responses from your email marketing.
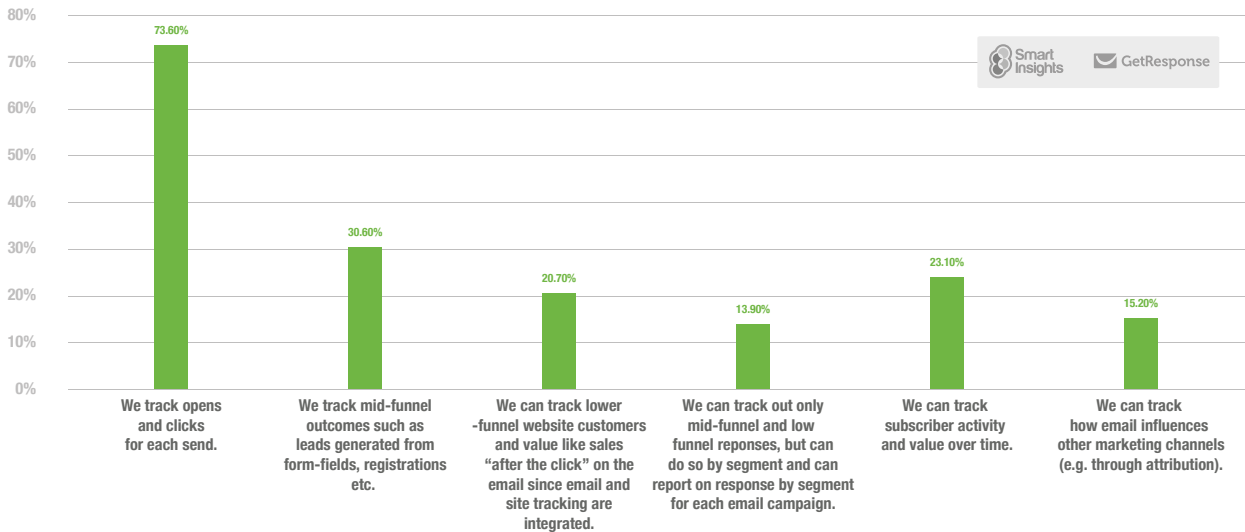
**BEST PRACTICE TIP:**

Ensure you email platform is integrated
to collect lower funnel metrics.

Often, the reason why marketers simply use email opens and clicks for measurement
is that their email system isn't integrated with their website to record outcomes
beyond the click, so ensure your system can do this by tagging marketing outcomes
that occur on the website.

Next, we asked email marketers to select which tracking metrics they used (choosing
all that applied).

## How emails sends are tracked

| Metric | Value |
|---|---|
| We track opens and clicks for each send. | 73.60% |
| We track mid-funnel outcomes such as leads generated from form-fields, registrations etc. | 30.60% |
| We can track lower -funnel website customers and value like sales "after the click" on the email since email and site tracking are integrated. | 20.70% |
| We can track out only mid-funnel and low funnel reponses, but can do so by segment and can report on response by segment for each email campaign. | 13.90% |
| We can track subscriber activity and value over time. | 23.10% |
| We can track how email influences other marketing channels (e.g. through attribution). | 15.20% |

The results show that the majority of businesses use basic response measures such as open and click rates to review email marketing effectiveness. All email services provide these metrics, so this is as we might expect.

However, over half of marketers use integrated tracking from their email marketing service to track website marketing outcomes such as mid-funnel metrics like leads (31%) or lower funnel metrics like sales (21%). Integrated tracking like this is essential for calculating the return on investment of email marketing.

Just 14% of those surveyed track responses by segment to see whether their campaigns are resonating with the audience.

Only 23% track subscriber activity over time: for example, the proportion of active and inactive subscribers across a year.

Only 15% use attribution to compare email marketing with other marketing channels.

**BEST PRACTICE TIP:**
Go beyond tracking opens and clicks across all subscribers for each campaign to evaluate and improve email effectiveness.

Options to consider include tracking marketing outcomes from the site, measuring subscriber activity through time, and measuring the activity of segments.
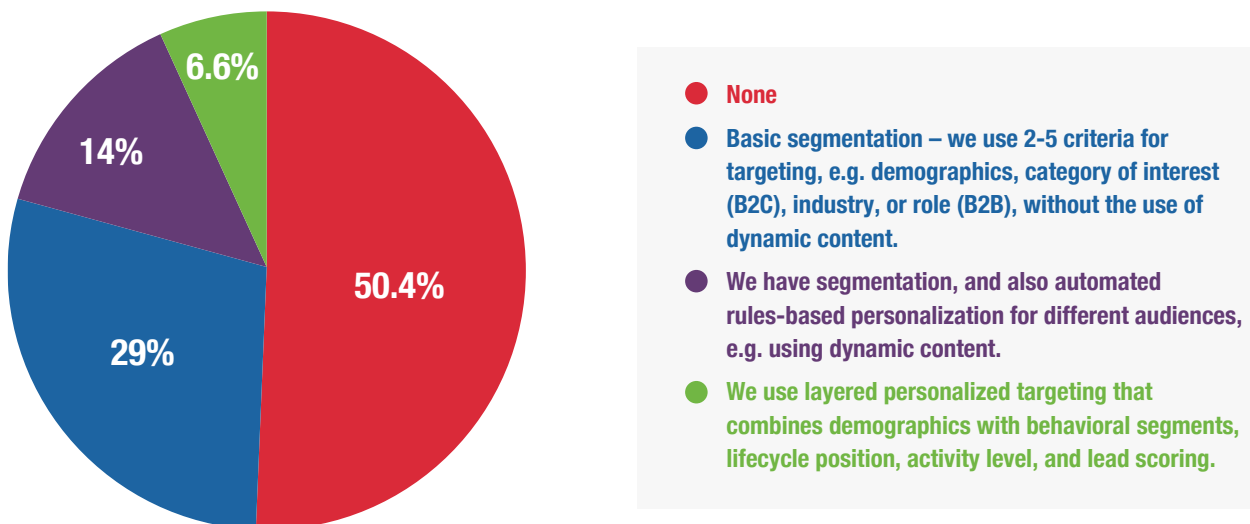
# Capability 2: Targeting

Delivering relevant content to audiences is crucial to successful email marketing. The use of targeting to tailor and personalize messages is a core email marketing technique. So we were interested in finding out how many companies use the targeting functionality of email marketing or marketing automation systems.

## Which email targeting techniques do businesses use?

We assessed segmentation and targeting of emails based on the number of criteria that are used from none at all up to dynamic content.

## Type of segmentation used



- ● **None**
- ● **Basic segmentation – we use 2-5 criteria for targeting, e.g. demographics, category of interest (B2C), industry, or role (B2B), without the use of dynamic content.**
- ● **We have segmentation, and also automated rules-based personalization for different audiences, e.g. using dynamic content.**
- ● **We use layered personalized targeting that combines demographics with behavioral segments, lifecycle position, activity level, and lead scoring.**

Half (50%) don't use any targeting whatsoever, and less than a third (29%) use basic segmentation for targeting.  These results are similar to our previous report. Just 6% use lead scoring and other more advanced segmentation metrics and less than 15% use segmentation and personalization rules to reach specific audiences within their database. The problem is that email can work well for the businesses overall without targeting since it is so effective in prompting immediate response. Still this is not satisfactory for all subscribers as they are likely to get irrelevant emails that they will consider spam.

There are various possibilities for the low use of targeting.

All email service providers offer basic targeting that enables users to select sub-groups within the list based on criteria. Perhaps these segmentation options aren't sophisticated enough. Not all email service providers offer dynamic content insertion to serve up different content or offers for different segments. And these may be difficult to use. However, this is unlikely to be only a technology limitation; it suggests that businesses don't have clear plans to segment and target. There may also be a lack of skills in understanding segmentation methods for targeting amongst marketers.

**STRATEGY RECOMMENDATION:**

If you don't have an email targeting strategy, create one.

Organizations should build email targeting into automated emails from the start. This includes communications such as welcome sequences, where different messages can go to different audiences, e.g. male versus female or various business roles. Segmenting options should also be considered in newsletters and campaigns to boost relevance and response.

We asked email marketing experts for their thoughts on the importance of targeting.

Email marketing commentator Pam Neely provides this "call-to-arms":

> The 50% of you who aren't segmenting your email messages are missing out! It is a bit more work (but not as much as you think.) The boost you'll get in results will make you glad you tried.

## SECTION II. HOW EFFECTIVE IS EMAIL MARKETING TODAY?

Jordie van Rijn – email marketing and Martech consultant at Email Vendor Selection – certainly believes it's worthwhile, based on his experience. Jordie says:

> A marketer can't serve the perfect message for each recipient all the time. You can't be 100% relevance-proof, nobody expects you to be. But, you CAN cater to individual needs, wants, motivations, and profiles (groups) by targeting well. And if you do, as I have seen time and time again, it will improve results and customer relationships. For starters, try not to send your offer to people who can't act on it, for instance because they just bought your product...

Philip Storey, Founder of Enchant, a CRM consultancy, thinks that a change in mindset can help highlight the importance of targeting from a customer experience point of view:
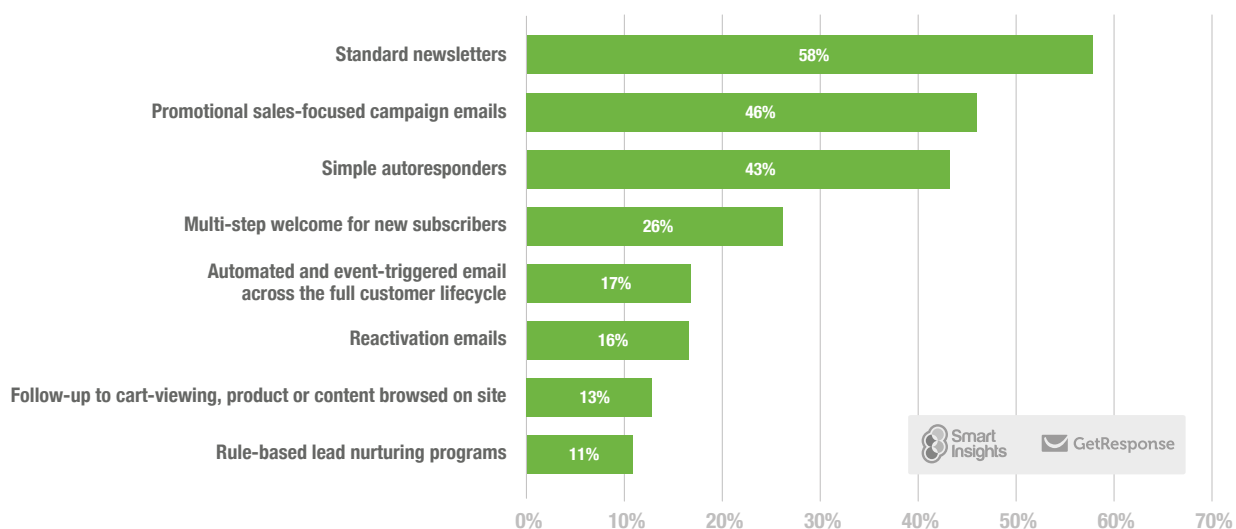
> Marketers are still thinking about campaigns as broadcasts to their entire database, instead of opportunities to create a truly valuable connection with people. Ultimately, most marketers are still using email as an advertising channel and thinking about volume instead of quality. To take things to the next level, brands must put their customer's different needs and desires at the forefront of their email communications strategy. The goal is to create the ultimate customer experience in the inbox – one that generates the highest ROI.

# Capability 3: Communications strategy

The communication strategy for email marketing involves defining the best combination of message types, targeting, and frequencies to meet marketing goals.

Let's take a look first at type of emails sent. Newsletters and solus campaign (a single promotional focus campaign) emails are the workhorses of traditional emails that are sent manually (although today some newsletters are automatically curated from blog content). So it was no surprise to see that newsletters were the most popular type of email, used by 58% of those surveyed with promotional focused campaign emails second place with 46% of responses.

**Email marketing communications used**

| Communication type | % |
|---|---|
| Standard newsletters | 58% |
| Promotional sales-focused campaign emails | 46% |
| Simple autoresponders | 43% |
| Multi-step welcome for new subscribers | 26% |
| Automated and event-triggered email across the full customer lifecycle | 17% |
| Reactivation emails | 16% |
| Follow-up to cart-viewing, product or content browsed on site | 13% |
| Rule-based lead nurturing programs | 11% |

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Automated emails such as autoresponders or a multi-step email were less popular with just 17% saying that they use automated and event-triggered emails across the full customer lifecycle. This shows there is a lot more potential for marketing automation in over 80% of businesses. Although there is much attention and hype around the use of artificial intelligence, which can be deployed for marketing automation using predictive analytics or machine learning analysis of previous campaigns to define rules for future ones, we advise businesses starting out with marketing automation to start small with welcome campaigns.

Philip Storey, Founder of Enchant, a CRM consultancy, suggests that although adoption of email automation may be thought complex, the reality is simpler:

> Many marketers still feel that automated messaging is tricky to achieve or expensive. But in fact, it's simple to achieve, and most email service providers offer this functionality right out of the box. There is so much that B2C brands can learn from the adoption of email marketing automation in the B2B world. The first step is to take a look at the most valuable moments in the customer journey and create automated experiences that customers want. Putting customers first always wins. And this is where most marketers need to refocus – how they create value propositions using email marketing automation.

Jordie van Rijn, email marketing and Martech consultant at Email Vendor Selection, believes it's worthwhile based on his experience. Jordie says:

> We talk about the customer journey as if it is something we all have taken care of with some simple autoresponders. We forget that it is not our journey but the customer's. A welcome email, for instance, is the easiest triggered email in the book. During onboarding, the foundation for the customer (email) relationship is created. The new subscriber has let you know they
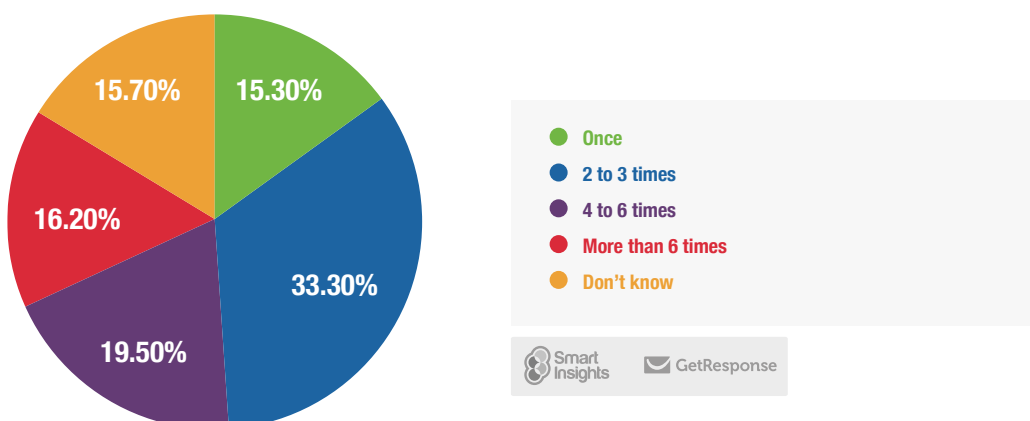
are interested in you and your brand. Be sure to make optimal use of that heightened attention. Think it through. In 99% of the cases, not everything can or should be said in one email. The beauty of automated messaging is that you set it once, and it will continue to contribute to your marketing program even if you don't optimize it further, which you should!

## Email frequency

Deciding on the best frequency for email marketing in each business is an important part of a communications strategy since there is the potential you can under-mail and miss out on sales or lead nurturing or you can over-mail and be perceived as a spammer leading to a higher level of unsubscribes.

The results of a question about frequency shows a range of approaches as expected, suggesting that those businesses that are emailing their subscribers once or twice a month could be missing out on interactions with prospects and customers since they don't have a plan or sufficient resources to contact their customers more often. At the other extreme, many would consider that more than 6 sends per month is excessive and will lead to unsubscribes. But it could make sense in some cases such as a publisher with multiple newsletter updates.

**Maximum number of times an email address is contacted in one month**



Legend:
- Once — 15.30%
- 2 to 3 times — 33.30%
- 4 to 6 times — 19.50%
- More than 6 times — 16.20%
- Don't know — 15.70%

Smart Insights    GetResponse

**STRATEGY RECOMMENDATION:**

Vary frequency by subscriber to increase relevance.

Marketing automation can be used to manage frequency in a more granular way.
As well as regular newsletters and promotions, automation can be used to overlay
other types of emails such as follow-up emails and re-engagement emails.
For example, Amazon reduces frequency for less active subscribers, but will follow up
to remind about a product or category that has been browsed on site, so providing
a more relevant email.

## Capability 4: Optimization

Our final capability we asked about involves optimization. We asked about a range
of optimization techniques, some of which related to other capability levels. Across
the range of techniques, fewer than half of businesses are using each optimization
technique with around half (51%) not proactively testing their email marketing and
fewer than 17% having a program of continuous tests for email marketing. Kudos
to this group of 17% for deploying the resources and process to achieve this! Email
marketers are most active in subject line testing, but testing of layout and rendering
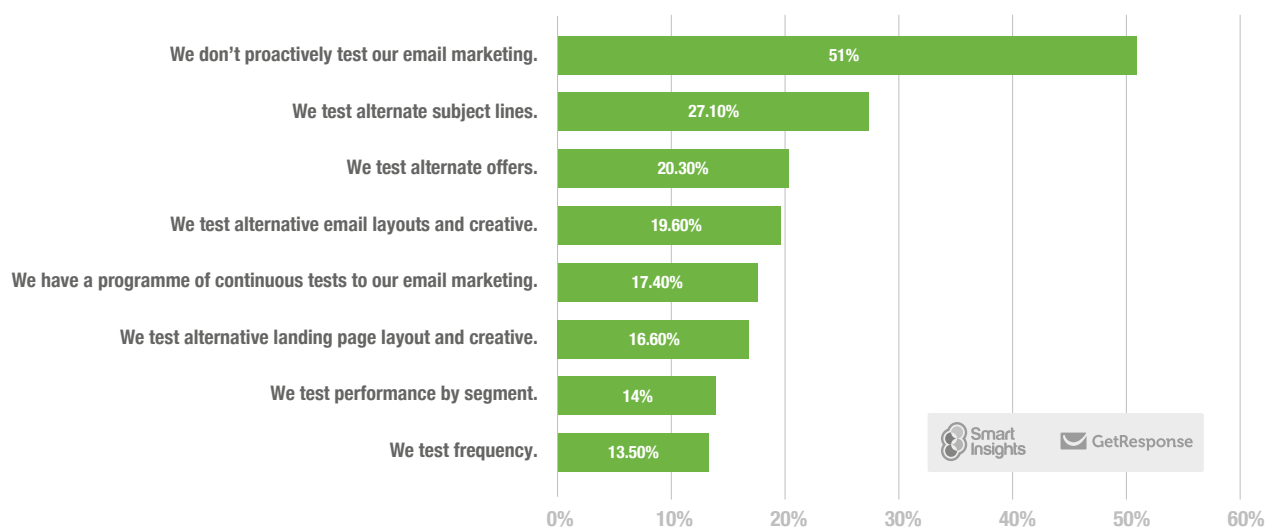in various email clients and browsers is less common than expected.

One-third didn't use any of the techniques we mentioned. So overall, there are
opportunities for more sophisticated email marketing in many businesses.

**STRATEGY RECOMMENDATION:**

Increase the range of tests you use to optimize your
email marketing.

To use email marketing to the maximum, techniques such as reviewing effectiveness
by segment and testing frequency and offers are essential, particularly if you are
using larger lists. You could be leaving a lot of money on the table.

## How email marketing communications are tested and optimized

| | |
|---|---|
| We don't proactively test our email marketing. | 51% |
| We test alternate subject lines. | 27.10% |
| We test alternate offers. | 20.30% |
| We test alternative email layouts and creative. | 19.60% |
| We have a programme of continuous tests to our email marketing. | 17.40% |
| We test alternative landing page layout and creative. | 16.60% |
| We test performance by segment. | 14% |
| We test frequency. | 13.50% |

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0%   10%   20%   30%   40%   50%   60%

**BEST PRACTICE TIP:**

Test email frequency against the value generated from your list.

It's difficult to find the sweet spot between under-mailing and over-mailing. The best practice is to test different frequencies on segments of your database. Testing will reveal the value generated versus engagement and satisfaction, measured as open, CTR, and complaint rates.

To strike the right balance between frequency and value, try varying the frequency based on the level of engagement, so loyal, high-value customers receive emails more frequently.

We asked Jordie van Rijn to explain this pattern.

> Don't be thrown off by the dip at the higher sophistication end of the spectrum. We are comparing apples to oranges here. Often the advanced senders will also have bigger (but older) databases, or are in a high-velocity industry like fashion or travel, sending more frequently. All of those have a profound impact on response rates, but still they get more traffic and sales because of their scale.
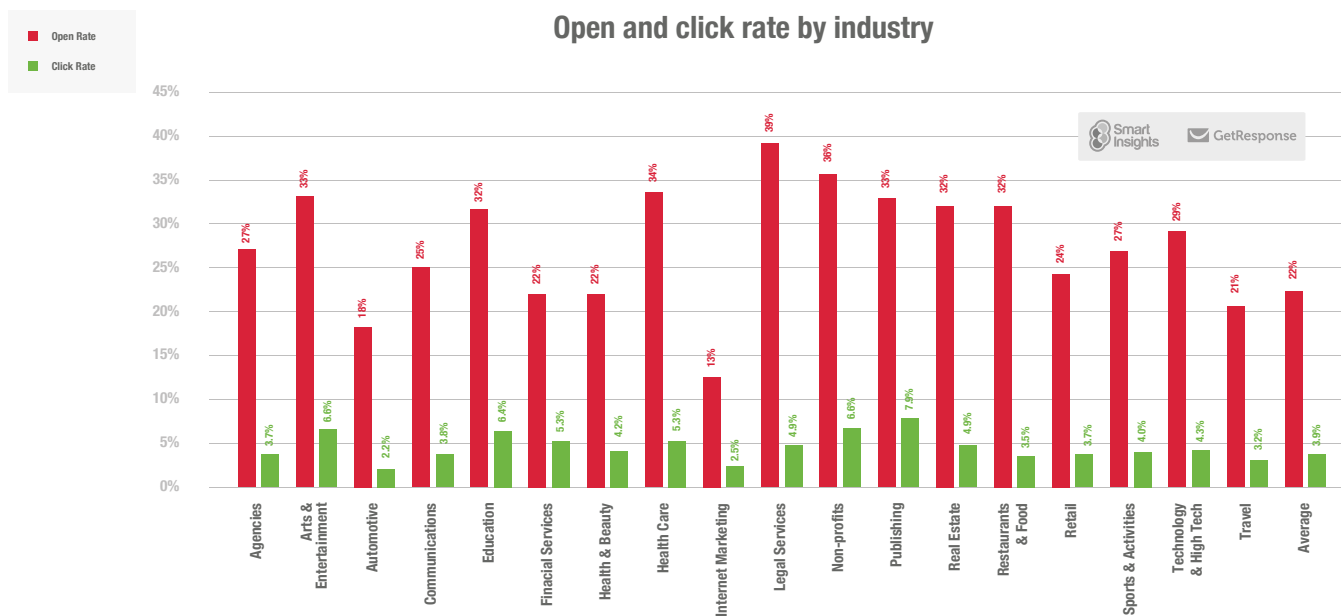
## Variation in response rates by industry

Here's another point to note about reviewing open and click rates by sophistication: the figures represent averages. Averages are dependent on the sector, and the maturity of companies in each sector is likely to vary. We often hear the question, "How does our open and CTR compare?" So we thought it would be useful to present the variation in open rates and CTR across the GetResponse customer base. The chart below shows the variation from over 7 billion emails sent.

Since these are averages, the response or engagement rate will vary greatly depending on the type of email and the lifecycle stage of the customer. For example, welcome emails and transactional emails (such as customer service emails) will gain a much higher open rate and CTR than newsletters sent to long-time subscribers. So our final recommendation to help take your email marketing to the next level is:

**STRATEGY RECOMMENDATION:**
Report email response by email type, segment, and lifecycle stage.

## Open and click rate by industry



**Legend:** ■ Open Rate  ■ Click Rate

| Industry | Open Rate | Click Rate |
|---|---|---|
| Agencies | 27% | 3.7% |
| Arts & Entertainment | 33% | 6.6% |
| Automotive | 18% | 2.2% |
| Communications | 25% | 3.8% |
| Education | 32% | 6.4% |
| Finacial Services | 22% | 5.3% |
| Health & Beauty | 22% | 4.2% |
| Health Care | 34% | 5.3% |
| Internet Marketing | 13% | 2.5% |
| Legal Services | 39% | 4.9% |
| Non-profits | 36% | 6.6% |
| Publishing | 33% | 7.9% |
| Real Estate | 32% | 4.9% |
| Restaurants & Food | 32% | 3.5% |
| Retail | 24% | 3.7% |
| Sports & Activities | 27% | 4.0% |
| Technology & High Tech | 29% | 4.3% |
| Travel | 21% | 3.2% |
| Average | 22% | 3.9% |

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Ask your email service provider or email specialist how to create a report or extract data comparing response by different types of email and segments. The insights will enable you to improve specific communications for different customer groups.
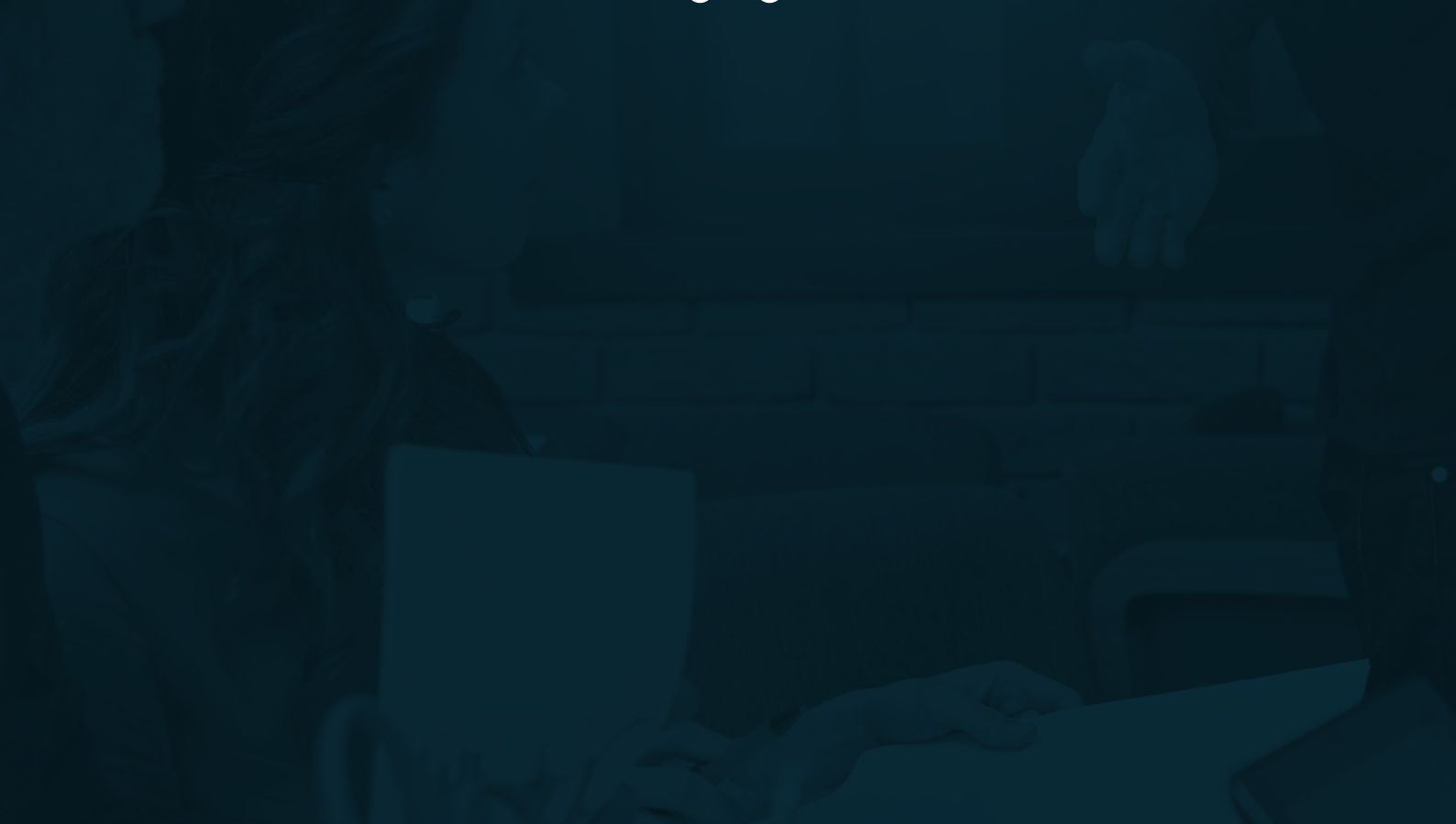
Section 3

# MARKETING AUTOMATION OPPORTUNITIES

Just ten years ago, marketing automation systems didn't exist as a category of marketing technology for business. Sure, in practice, we could automate marketing activities through email marketing broadcast, campaign management and CRM systems. Today, marketing automation and marketing cloud services are an established category of marketing technology, particularly for business-to-business (B2B) marketing. Automation has rightly gained a lot of attention as a smart method of integrating prospect and customer marketing communications across the customer lifecycle.

## What is it?

Marketing automation enables businesses to automate tasks in the marketing and sales process to convert leads to sales. It includes automated welcome and nurture email sequences, lead scoring, and personalization of email and web pages based on profile and interaction with communication and content.

We saw at the start of section 2 when we asked about business use of marketing automation capabilities that just one quarter (27.5%) of respondents rated their use of marketing automation as good or high. 17% don't use marketing automation at all, or don't use many of the features, with a further 55% not rating their use of features positively.

In this section we drill down to look at the potential and actual use of the marketing automation functionality in more detail.

## Applications of marketing automation

Marketing automation offers many opportunities to deliver engaging messages and content throughout the customer lifecycle to encourage conversion to sale. It came to prominence for B2B marketing where it is commonly used to nurture leads so they can be qualified as a marketing qualified lead that can be then followed-up using personal selling. But marketing automation applies in any industry sector
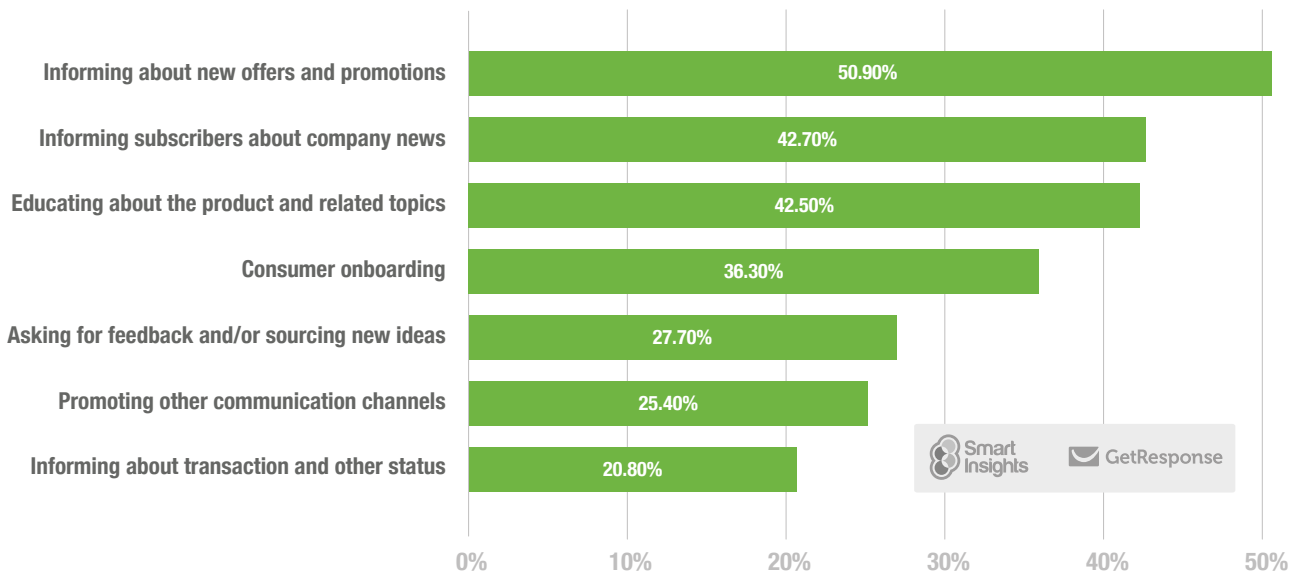
and works well in consumer businesses, too. To demonstrate the opportunities for automated emails Kath Pay of research partner Holistic Email Marketing developed this visual to show how a retailer can use email through a relationship with its customers. All types of businesses can use this visual to complete a gap analysis of types of emails they currently use across the customer lifecycle against automated emails they could deploy in the future.



Sample Lifecycle Communication

The next chart shows the popularity of different applications of marketing automation. You can see that many of the applications are not rocket science,instead they involve smarter ways to deliver more relevant content around products and promotions.

## Applications of marketing automation

| Application | Percentage |
|---|---|
| Informing about new offers and promotions | 50.90% |
| Informing subscribers about company news | 42.70% |
| Educating about the product and related topics | 42.50% |
| Consumer onboarding | 36.30% |
| Asking for feedback and/or sourcing new ideas | 27.70% |
| Promoting other communication channels | 25.40% |
| Informing about transaction and other status | 20.80% |

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Automation is also great for integration, for example by encouraging promotion of other channels. Asking for feedback is also quite a popular choice – show your customers you care by asking for feedback and then using it to improve their experience and letting them know the actions you have taken.
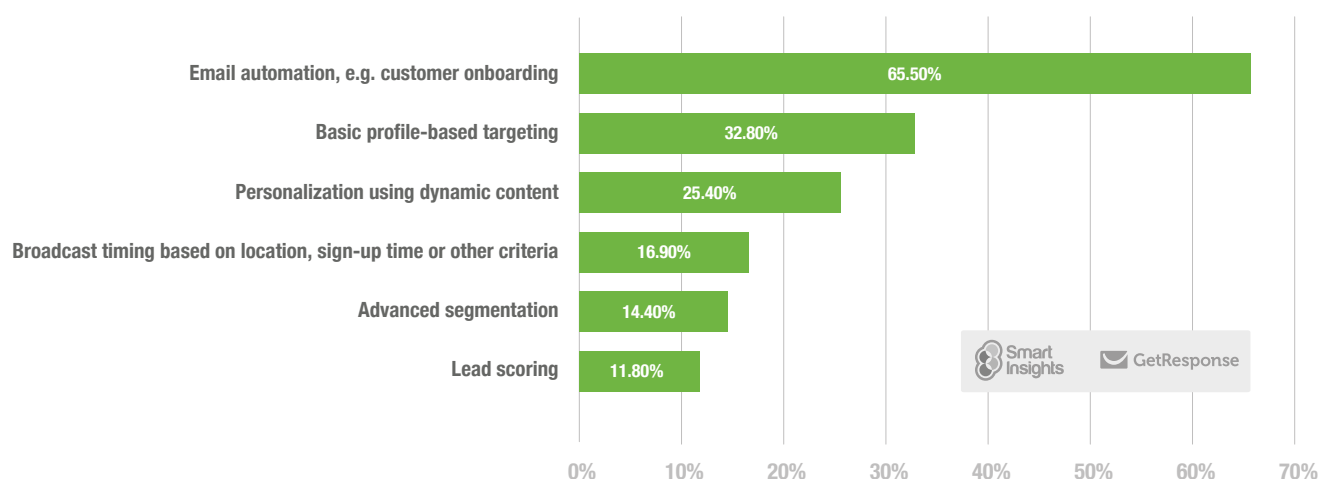
**BEST PRACTICE TIP:**

Use email automation to encourage social media engagement.

If you don't already, consider using your welcome or reactivation email sequence to promote your most important social media channels – don't just show the icon, instead automatically surface the most popular content to encourage engagement.

# Marketing automation techniques used

As we saw in the lifecycle chart at the start of this section, marketing automation gives new opportunities for email marketers to send different triggered email types that can be designed in advance. The research assessed how often different types of automated emails are used, and the use of other marketing automation techniques such as lead scoring, which automatically assesses the propensity of a respondent to convert to sale.

## Marketing automation techniques currently used

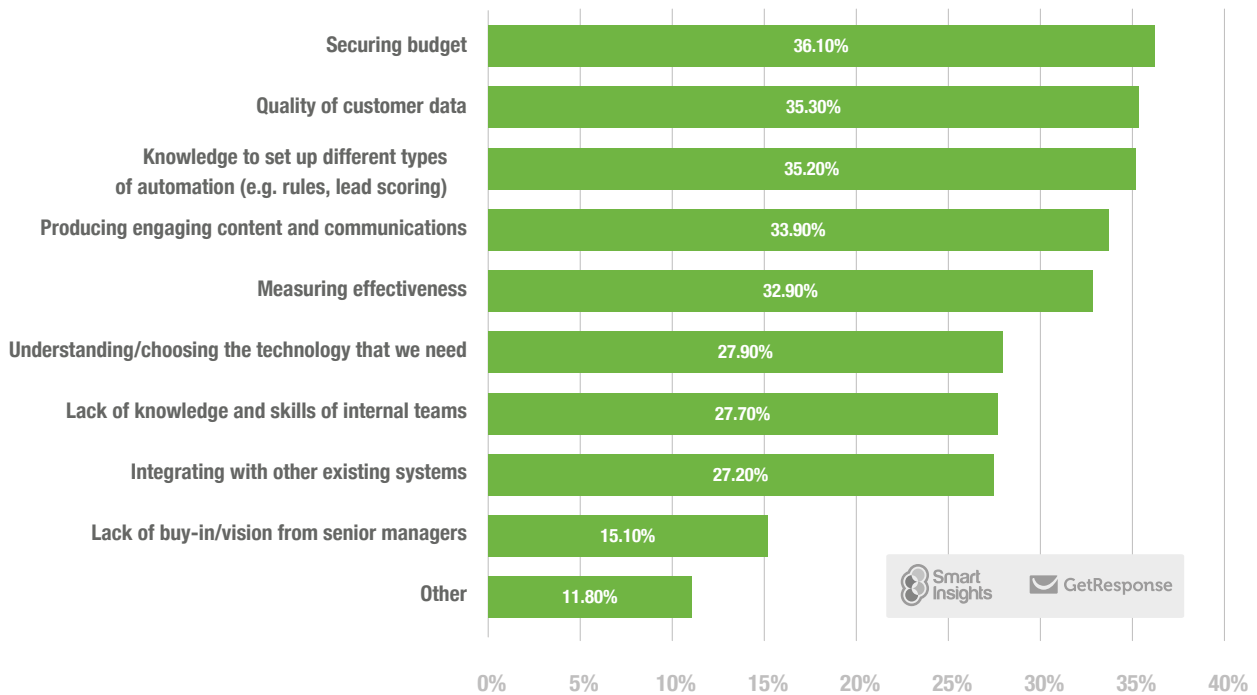| Technique | Percentage |
|---|---|
| Email automation, e.g. customer onboarding | 65.50% |
| Basic profile-based targeting | 32.80% |
| Personalization using dynamic content | 25.40% |
| Broadcast timing based on location, sign-up time or other criteria | 16.90% |
| Advanced segmentation | 14.40% |
| Lead scoring | 11.80% |

Smart Insights    GetResponse

Some form of email automation was used by nearly two-thirds of marketers, but other techniques were less popular, for example use of targeting and dynamic content.

# Challenges and barriers to adopting marketing automation features

Given that many businesses aren't yet fully exploiting the benefits of marketing automation, we wanted to know what was holding back adoption. Through knowing common barriers, marketers can look to break them down! We asked participants to select all challenges that apply, varying from strategic to practical issues. For most, the challenge isn't in the system itself (just 28% said they were held back by choosing technology or features) or skills (also mentioned by 28%).

## Top marketing automation challenges

| Challenge | Percentage |
|---|---|
| Securing budget | 36.10% |
| Quality of customer data | 35.30% |
| Knowledge to set up different types of automation (e.g. rules, lead scoring) | 35.20% |
| Producing engaging content and communications | 33.90% |
| Measuring effectiveness | 32.90% |
| Understanding/choosing the technology that we need | 27.90% |
| Lack of knowledge and skills of internal teams | 27.70% |
| Integrating with other existing systems | 27.20% |
| Lack of buy-in/vision from senior managers | 15.10% |
| Other | 11.80% |

Smart Insights    GetResponse

Although buy-in from senior management wasn't a barrier for most (mentioned by just 15%), unsurprisingly securing budget was suggesting it's difficult to make a business case for investing in setting up automation.

Indeed, this was another major barrier with 35% saying they didn't have the knowledge to set up different types of automation like automation rules or lead scoring. Finding engaging content was another significant challenge.

We also asked an open question to understand the common challenges. Here are some examples from around the world which show the challenges and how they are being overcome. At least they may help you share the pain, you are not alone!

"
Lack of digital marketing knowledge within the marketing department; technology infrastructure outdated and doesn't support marketing, i.e. no CRM and business slow to change.

*Amstelveen, Netherlands*

"
Lack of resources (two people in the marketing department). So much info – don't know where to start. Lack of time in sourcing and curating content, e.g. frequent blogs.

*Brisbane, Australia*

"
1. Taking the time to learn an automation system
2. Taking the time to understand the use and fit of the automation system in a marketing campaign
3. Developing content

*Charlottesville, United States*

"
Having time and staff to implement new and more advanced features.

*Chicago, United States.*

Having data in one place – currently it is all done manually. Our developers are struggling to integrate our email provider with our site. We are still working on segmenting customers

*Fareham, United Kingdom*

1. Lack of building strategies and planning.
2. Among the challenges we are facing is to grow our database and attract more traffic to our website.
3. Convert our visitors to hot leads and nurture them to get to the bottom of the funnel.

*Rabat, Morroco*

Selecting providers of email marketing solution; engaging our legacy subscribers / existing customers.

*Singapore*

Section 4

# INTEGRATING CONTENT MARKETING & MARKETING AUTOMATION

Content marketing is one of the major trends in marketing over the last five years, highlighted by the popularity of the advice from the Content Marketing Institute. It has proved an appealing concept to marketers since content is the fuel for inbound marketing using the channels introduced at the start of the research such as search engine marketing, social media and, of course, email marketing.

## STRATEGY RECOMMENDATION:
Create a content marketing strategy.

Devising a content marketing strategy gives a method to integrate communications around different types of customer personas so they can be engaged based on their interests and profile. At the same time, email marketing is a powerful method to deliver relevant content through the customer lifecycle.

Given the popularity of email marketing and content marketing, we were interested to assess the sophistication of the techniques used to integrate them in a planned, strategic fashion.

**Techniques used to integrate content with email marketing and marketing automation**
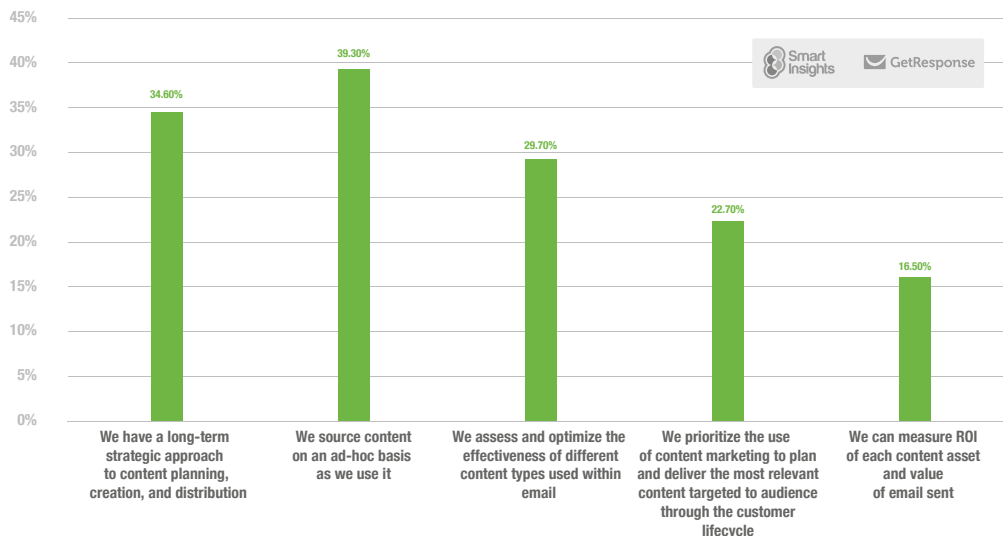
Despite the popularity of content marketing, responses show that a relatively small proportion of marketers are planning their use of it, with only one third (34.6%) having a long-term strategic approach to content planning, creation and distribution. Many businesses (39.3%) simply source content on an ad-hoc basis as they use it, suggesting the approach isn't strategic.

Likewise, with measurement, less than one-third assess and optimize the effectiveness of different content types used within the email, and just 16.5% can measure the ROI of each content asset and value of each email sent.

## What types of content should be used?

The beauty of content marketing today is that there are so many different types and formats of content that can be distributed by email marketing and other channels.

To facilitate consulting and training workshops, Smart Insights developed the Content Marketing Matrix. We recommend this matrix and the companion Content Distribution Matrix as a technique that can be used in any business to review current use of content marketing and identify new types of content. Larger businesses may want to review content mapping across the customer lifecycle for different personas.

**BEST PRACTICE TIP:**
Complete a content gap analysis for your personas.

Our matrix is structured to help you think through the dimensions of current and future content based on what your buyer personas will engage with to support the buying process and what you're trying to achieve as a business. The gap analysis including benchmarking against competitor content will show the content you are offering now against what you can offer in the future.
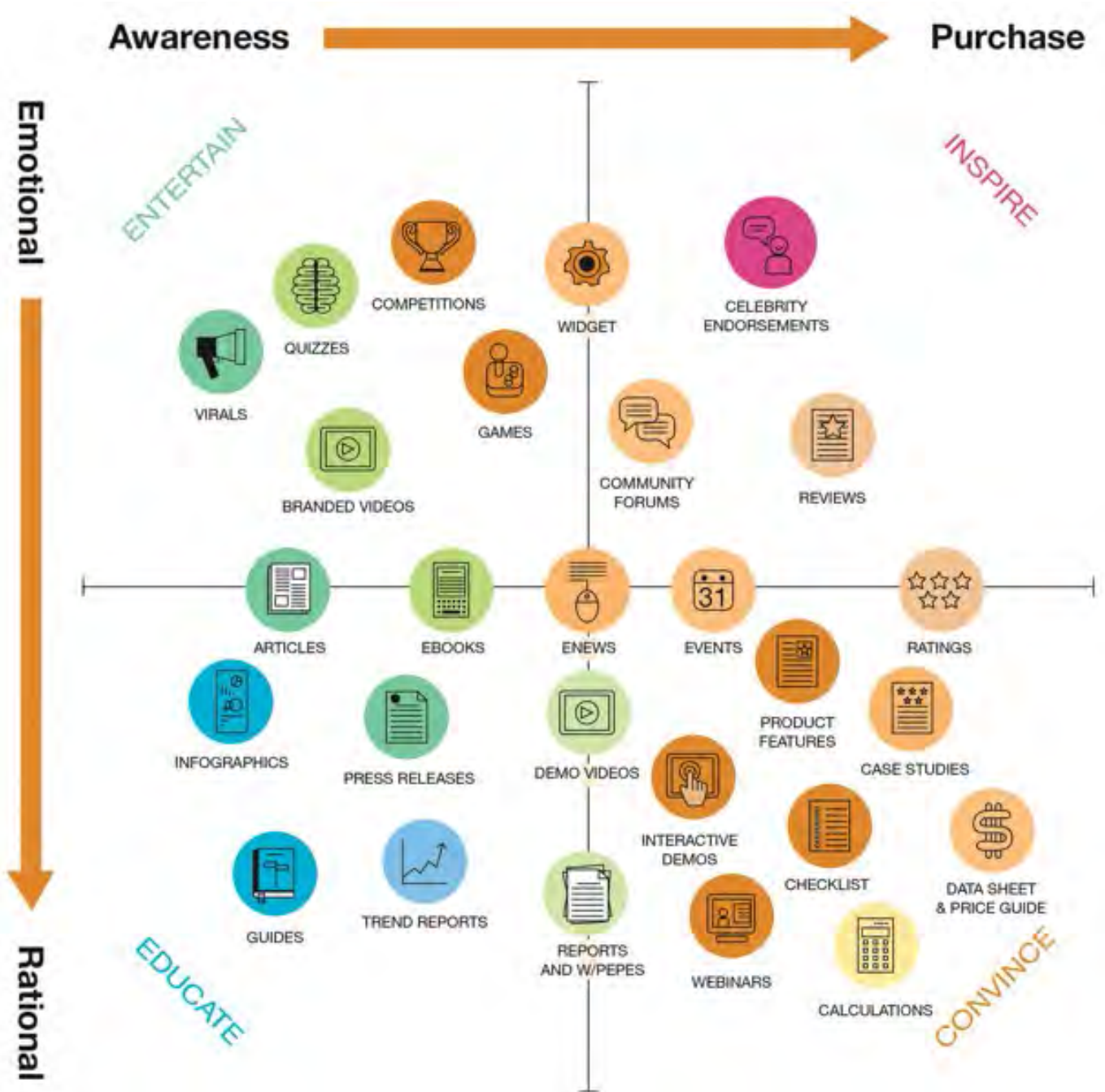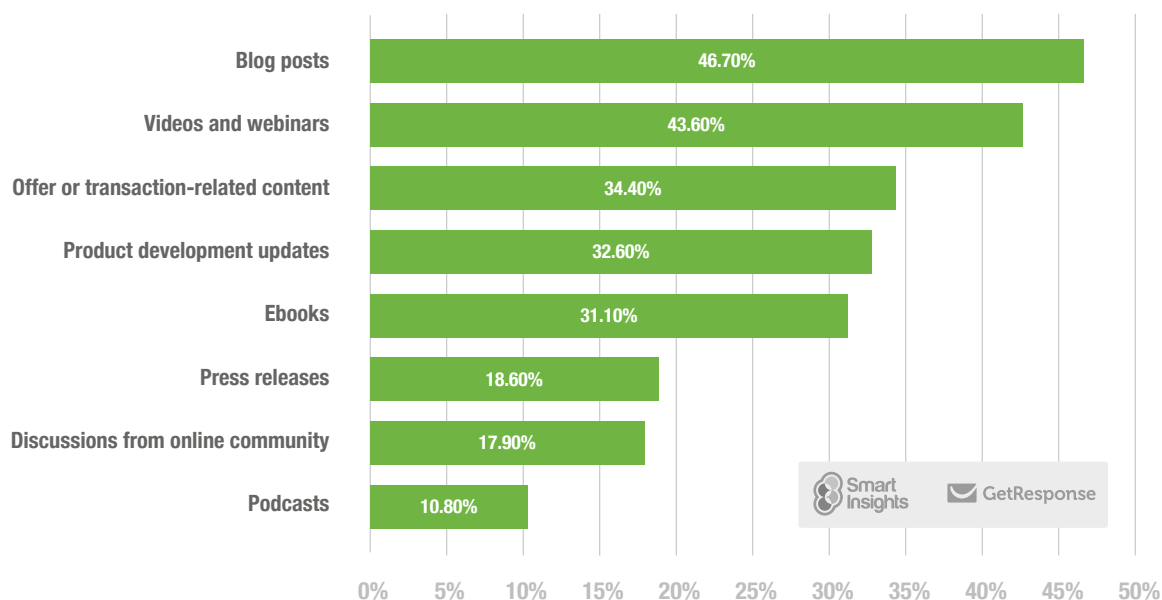
# Content distribution using marketing automation

To show the use of email and marketing for content distribution we asked about the content types shared via marketing automation. This acts as a checklist of the wide range of content types you can potentially share through automation or standard emails alike, but there are other types, too, such as automated surveys or prompts for product reviews.

## Content types distributed using marketing automation



| Content type | Percentage |
| --- | --- |
| Blog posts | 46.70% |
| Videos and webinars | 43.60% |
| Offer or transaction-related content | 34.40% |
| Product development updates | 32.60% |
| Ebooks | 31.10% |
| Press releases | 18.60% |
| Discussions from online community | 17.90% |
| Podcasts | 10.80% |

Smart Insights | GetResponse

**BEST PRACTICE TIP:**

Consider which content types you can distribute via automation.

Automating content distribution can help save time and create more relevant, more responsive emails by personalizing the content type to the individual and their position in the lifecycle.

# Conclusion

As a summary of our main suggestions in this report, here are our recommendations to help you improve your email marketing and marketing automation.

1. **Start by reviewing your capability**. What's the gap between all the marketing automation activities that you could use against those you actually use?

2. **Create an overall customer lifecycle engagement strategy based on automated messaging**. This will give you a structured communications plan to welcome, nurture, and retain customers with relevant content and promotions using email marketing, web personalization, and paid media techniques such as retargeting.

3. **Integrate with your content marketing strategy**. Don't consider email marketing or marketing automation in isolation. Without a content marketing strategy, you will limit your opportunities to engage your audiences with different content themes and formats to support your goals. You also won't be making the most of influencer outreach and organic and paid content distribution options.

4. **Start small with a single automation campaign and build on that**. While you can map out your whole automation program, you will learn on the way. So start with a single welcome email campaign, and then improve its sophistication by sending out a multi-step welcome layering on targeting.

5. **Don't miss out on the power of targeting to increase message relevance**. The report shows that many businesses use no or limited targeting, yet we know that targeted messages get better responses. Remember that you can use dynamic content to make targeted messages simpler to set up.

6. **Get your frequency of messaging right**. Without a defined communication strategy, it's all too easy to under-mail, or over-mail, and again fail to make the most of the opportunities email marketing and marketing automation can bring you.

7. **Ring fence time for implementing marketing automation**. We've seen companies fail to make the most of automation, since they've naturally been distracted by the need to manage campaigns and other activities. You need to take time to set up your automation rules, dynamic content, leads scoring and grading. Once that's done, you will benefit from tweaking them.

8. **Put the right measures in place and build in time for optimization**. We have seen that many businesses simply measure opens and clicks without thinking about response rates over time or by segment, or – most importantly – the value they generate. With more detailed tracking you will be able to do much more to improve your email marketing results.

For more strategy and practical advice on making the most of automating email marketing, see Dave Chaffey's articles and webinars on GetResponse blog or the email channel on Smart Insights.

## Your comments, please!

Thank you for taking a look at our email marketing benchmark report. We hope you have found it interesting and, most of all, useful for getting ideas on new techniques to improve your email marketing.
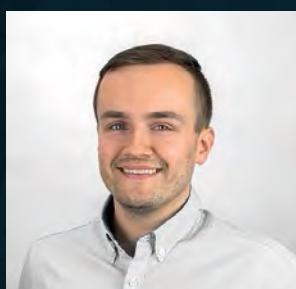
We'd love to know your thoughts. If you have any questions or comments, get in touch via our websites: Smart Insights, GetResponse, Content Marketing Institute, or Holistic Email Marketing.

Best wishes for your email marketing into 2017 and beyond!

*Dave Chaffey*

**Dave Chaffey**
Smart Insights

*Michał Leszczyński*

**Michal Leszczynski**
GetResponse

# Appendix

## Methodology

# Who participated in the research?

The survey was completed online during January 2017. The total sample size was 2,510 – a huge "thank you" if you participated!

## Respondent roles

We surveyed Smart Insights members around the world; customers of GetResponse, and subscribers to the Content Marketing Institute and Holistic Email Marketing. Smart Insights members were invited to take part through email and social media requests. GetResponse members were invited to take part via a prompt in their user control panel while they were signed in.
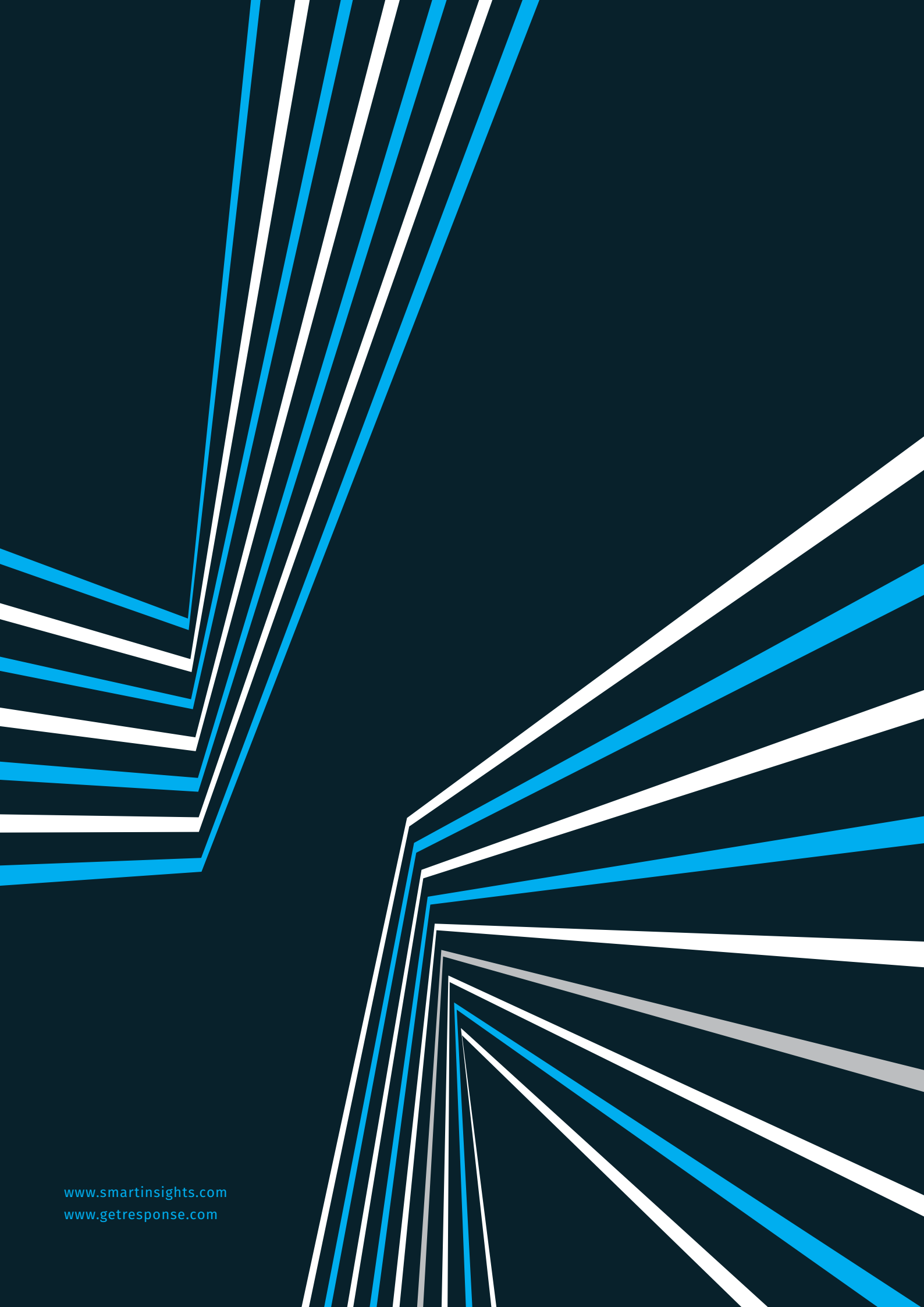
Because the focus of the survey and report was on the management of email marketing to improve results, there was a high proportion of senior respondents responsible for digital marketing. 4 in 10 (42%) of respondents were senior, with a role of CEO, director, owner, department head, or manager of marketing, digital marketing or ecommerce. Around a quarter (26%) were owners of businesses, reflecting the many smaller businesses that use Smart Insights and GetResponse.

## Types of business

Respondents were from businesses covering the full range of industry sectors. The main sectors were online marketing (23%) retailers, financial services, B2B companies and agencies, and marketing service providers.

The breakdown of marketers involved in different forms of email marketing was: 41.8% business-to-consumer (B2C) marketing, 19.1% business-to-business (B2B) marketing (B2B), with 39.1% managing both B2C and B2B.

4 in 10 (39%) have 1 to 2,000 subscribers and 15% of respondents had between 2,001 and 10,000 people in their database. Almost 3 in 10 (27%) don't have a database currently.