DUTCH EMAIL BENCHMARK 2017

The 2017 Edition

DDMA

Dutch National Email Benchmark 2017

With the increased digitalization of societies and due to the high return on investment, the use of email marketing is strategically important for many companies. In this report the Data Driven Marketing Association (DDMA) presents the Dutch annual email benchmark of 2017. The data set analysed in this research is comprised of email campaigns sent between January and December 2016. This benchmark aims to provide insight into the effectiveness of campaigns and into which drivers (e.g. time of day or a specific technique) make a campaign more effective This year's benchmark includes 4.7 billion emails sent in 185k campaigns by 2.901 companies, provided by 7 Email Service Providers (ESP's), which represents a substantial part of the total amount of campaigns that are sent in the Dutch market.

This year we introduce a new chapter: Trend analysis, which compares the changes in Confirmed Open Rate (COR), Click Through Rate (CTR) and Click To Open Rate (CTO) over past 5 years. This section highlights the differences between the 2017 and 2016 benchmarks (the latter covering campaigns sent between January and December 2015) in industry ratios and campaign characteristics, such as size, frequency, mobile usage and adoption of techniques.

Some of the main findings this benchmark has uncovered

Overall ratios. The COR has risen from 35,2% to 37,5%. CTR has declined slightly from 7,0% to 6,9%. The CTO has decreased with a drop from 17,4% last year to 16,4% this year. Since the 2012 benchmark, the CTO has been gradually decreasing from 22,1% to 16,4% this year.

Campaign size. A campaign size larger than 10.000 has a negative impact of up to -5,9% on ratios. 65% of campaigns are in the size buckets below 10.000. The smallest campaign size bucket between 500 to 1000 has the largest positive impact on COR, increasing it by +9,67% compared to average. This could be a proof that smaller campaign sizes are better targeted to their audience and thus more relevant for the reader.

Campaign frequency. Among the companies participating in the research, most, or 43,1% sent 0-10 campaigns in 2016. 35,9% sent 11-50, 10,25% sent 51-100 and 10,75% sent more than 100 campaigns. The average number of campaigns sent per company is 64. The impact of campaign frequency is positive in the 0-10 campaigns per year bucket. On average, companies sent more campaigns than in 2016.

Timing. Most industries have a strong focus on working days and hours. Of all campaigns, 72% are sent during office hours. Some industries (Retail, Leisure and Travel) have high activity in the evenings and weekend hours. These industries are related to leisure activities.

Techniques. Overall, the adoption of techniques (dynamic content, personalized email and responsive design) improves most ratios. The usage has increased for all techniques since last year. Responsive design is the most utilized technique (78%), followed by dynamic content (37%) and personalised subject line (6%). Dynamic content adoption has the highest impact on ratios. Its application increases the ratios on both desktop and mobile in the range of +0,7 to +3,0% compared to average. The industries with the highest adoption of techniques are Charity and Telecom.

Mobile usage. Of all campaigns, 40% are opened on a mobile device and 60% on a desktop. This is a +4% change compared to last year's benchmark (36%). Desktop dominates the opens during the week. However, during the weekend mobile takes over at times, with peak mobile opens at night with 56%, morning between 08:00 and 09:00 (57%) and in the evening from 19:00 to 20:00 (52%).

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Preface

Diana Janssen

Dear reader,

We herewith proudly present the 6th edition of the DDMA Dutch Email Benchmark.

In an ongoing effort to effectively communicate with customers, email is still the preferred channel for many marketers. Just like the past 5 years, the results of this study confirm the effectiveness of email as a means to create real customer engagement. The adoption of new technologies, making good use of data, creates new opportunities and further increases return on investment.

The DDMA Email Benchmark provides marketers with useful insight allowing them for instance to find out more about the effect of the use of dynamic content or to learn about the impact of campaign size or timing. In general or in specific industries. In addition, the new trend analysis compares the changes and highlights differences over the last five years.

I would like to thank the participating Email Service Providers and their clients for contributing to this year's benchmark. I also thank the DDMA Email Council for their support and feedback and of course many thanks to the team at PwC.

We hope our joint efforts will inspire you and help you achieve great email results.

Regards
Diana Janssen
General Director DDMA

CONTENT

Introduction

In this report the DDMA presents the Dutch email benchmark of 2017. The report can be used to measure the effectiveness of individual campaigns. The data includes campaigns that are held between January 2016 and December 2016, which constitutes a substantial part of the total number of email campaigns held in the Dutch market. More detailed comparisons can be made with the online tool on the DDMA-website: https://ddma.nl/nationaleemailbenchmark/

The first part of this report provides the traditional benchmark average ratios (COR, CTR and CTO) for all campaigns. The second part consists of a more detailed overview of specific campaign characteristics (size and frequency, timing, techniques and mobile usage). Thirdly, a new addition to this year's report is a chapter that describes the trends and year over year differences. Fourthly, deep dives per industry are given in the respective detailed industry pages. To navigate through the report, the menus on both sides of the pages and/or the table of contents on the previous page can be used.

This year's changes

This year's report welcomes a new trend analysis chapter that presents trends in COR, CTR and CTO over past 5 year. Furthermore it provides a comparison with the 2016 benchmark finding between the industry ratios, campaign characteristics (size, frequency and adoption of techniques) and mobile usage.

A reading guide and list of definitions can be found in the appendix and is directly accessible by clicking on the reading guide.

BENCHMARK 2017

| 7 Email Service Providers | 2901 Companies | 24 Industries | 185 Thousand campaigns | 4,7 Billion emails |

OVERALL RATIOS

This section contains the ratios for this year's benchmark, providing an overall description as well as the impact of the B2B and B2C segmentation on these ratios.

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The CTR remains steady since last year, the COR has slightly increased and the CTO has slightly decreased

	COR	CTR	CTO
Total	**37,5%**	**6,9%**	**16,4%**
B2C	37,1%	6,7%	15,7%
B2B	38,6%	7,5%	18,2%

	AR	SBR	HBR
Total	**99,1%**	**0,4%**	**0,5%**
B2C	99,3%	0,3%	0,4%
B2B	98,8%	0,6%	0,6%

The average COR of all campaigns is 37,5% increasing 2,3% compared to last year.

The average CTR of all campaigns is 6,9% which is comparable to the previous three benchmarks (7,0% in 2016, 7,3% in 2015 and 7,3% in 2014 respectively). The CTO is 16,4% which is a decrease compared to the last two years' benchmarks (17,5% in 2016 and 18,6% in 2015). Over the last few years the CTO has shown a negative trend, declining from 22,1% in 2012 to 16,4% in this year's benchmark. For B2C and B2B campaigns there are small variations in the ratios, with B2B having higher percentages than B2C campaigns. Again, it is important to note that it is hard to determine which factors have the most influence on the fluctuation of these ratios.

The AR metric, showing the email acceptance rate, has remained steady at 99,1% since last year. The same goes for the SBR ratio (0,4%) which has also remained constant.

HBR is at 0,5%, showing a steady decline over the last two years (0,6% in 2016 and 0,7% in 2015 respectively), thus implying a quality improvement of email delivery.

CAMPAIGN CHARACTERISTICS

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

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

i The graphs depict the campaign size and campaign frequency distribution across range buckets. The range split of number of emails sent per campaign by companies (campaign size), is almost the same compared to the past two years. The campaign frequency* gives an indication of how many campaigns were sent in 2016 on average per company. In contrast to the campaign size distribution, the campaign frequency distribution shows the distribution of companies among buckets, not campaigns.

Smaller campaign sizes are more prevalent, with utmost being sent in the size range of 1000-5000. The distribution of campaign size buckets between B2B and B2C alternates. In B2B campaigns there is a preference for a smaller campaign size. Similarly, the campaign frequency is rather low for both B2C and B2B. 43% of the companies have sent less than 11, and 36% of the companies have sent less than 51 campaigns in 2016. Only 21% of the companies have sent more than 50 campaigns in 2016.

Campaign size

Campaign size (x 1:000)

■ B2C ■ B2B
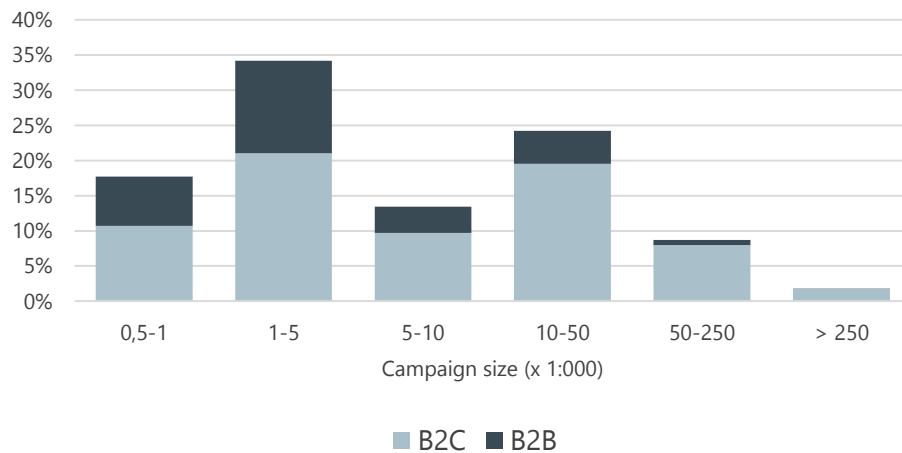
Campaign frequency (per company)

Campaign frequency (per year)

■ B2C ■ B2B
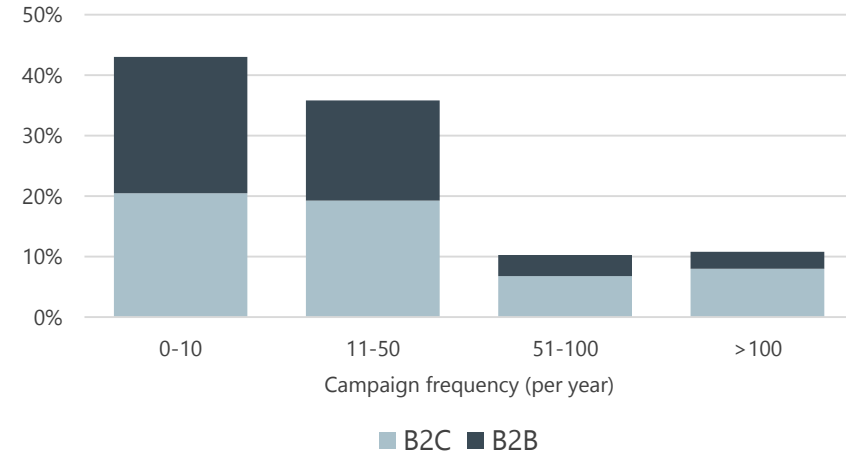
Notes:
* The calculation of the campaign frequency has been revised and differs from the calculation in the benchmark of 2016.

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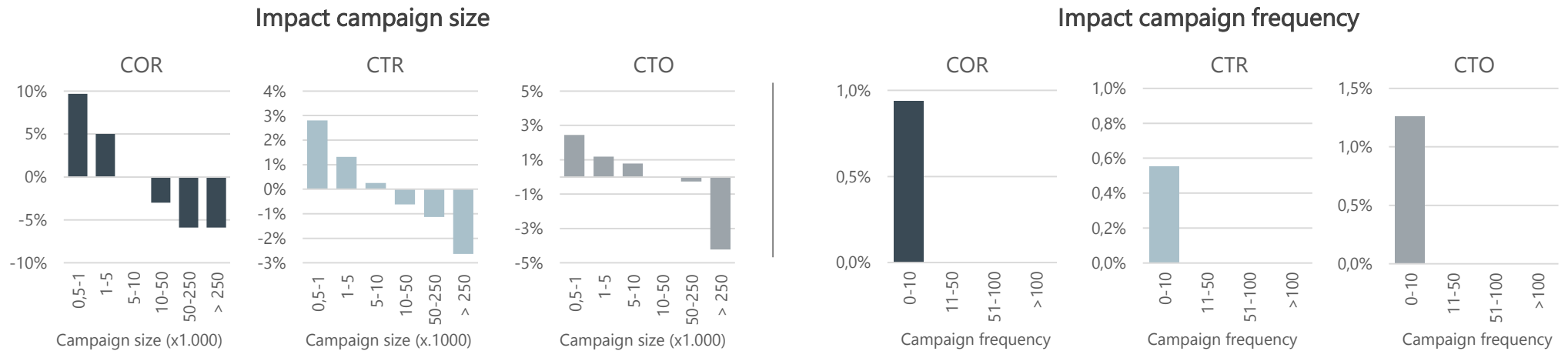
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Size and Frequency

A large campaign size has a negative impact, whilst companies that send 0-10 campaigns per year have higher than average ratios

The **campaign size** has the largest impact on the ratios of all campaign variables measured in this report. The graphs below show each of the ratios, per campaign size bucket in relation to the average ratios. For each of the ratios the smallest size bucket provides the best ratios. The larger a campaign gets, the more negative the results.

For the **campaign frequency** we see smaller effects. It seems that a smaller annual campaign frequency has a positive impact on the COR, CTR and CTO. Companies that send at most 10 campaigns per year have a higher COR, CTR and CTO compared to average. For campaign frequencies higher than 10 campaigns sent per year, the statistical analysis showed no significant result, preventing us from being able to draw conclusions about the impact. Thus these results were omitted from the graph.

Description

Impact

Impact campaign size

COR — Campaign size (x1.000)

CTR — Campaign size (x.1000)

CTO — Campaign size (x1.000)

Impact campaign frequency

COR — Campaign frequency

CTR — Campaign frequency

CTO — Campaign frequency

Notes:
1* The percentages shown in these graphs, illustrate the deviation (subtract/add) from the average ratio.
2* Only significant effects (p-value < 0,05) are shown in the graphs.

Out of all campaigns, 72% are sent during office hours *(Monday-Friday, 08:00-18:00)*

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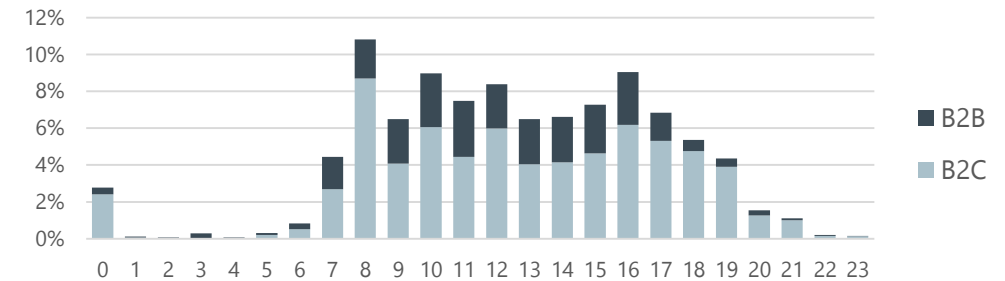The graphs on the right show the distribution of campaigns sent by hour, day and month.

Most campaigns are sent between 08:00 and 18:00 (78,4%). In the evening (18:00 to 22:00) 12,4% of the emails are sent; at night (22:00 to 06:00) 4,0% and in the early morning (07:00) the remaining 5,3% are sent.

The largest proportion of campaigns is sent during working days (89% of all campaigns). For B2B campaigns this is 97%, which indicates that there is hardly any activity during the weekends. B2C campaigns are mainly (85%) sent during the week with a small amount (15%) arriving in customer inboxes over the weekend.
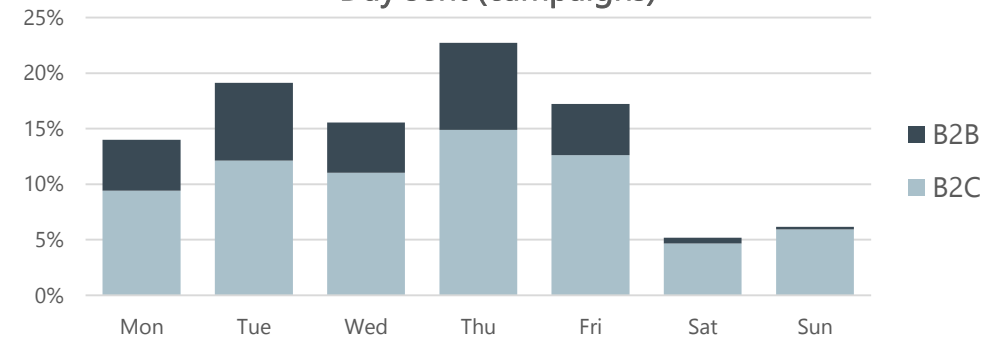
Thursday, followed by Tuesday and Friday are considerably favoured for B2C and B2B campaigns with a total 23%, 19% and 17% of all campaigns sent on these days.

The months show less variation than the hour or day, staying within the range of 7,1% to 9,9%. However, it is noticeable that in the summer holiday months of July and August less emails are sent. Similarly, January is less active as well. The busiest months are November, September and March, with small increases in campaigns sent compared to average.
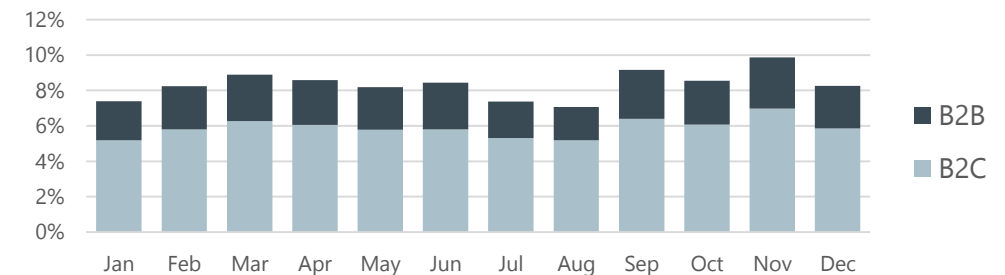
Description

Impact

Hour sent (campaigns)

B2B
B2C

Day sent (campaigns)

B2B
B2C

Month sent (campaigns)

B2B
B2C

The Number of Emails Sent Per Hour, Day and Month

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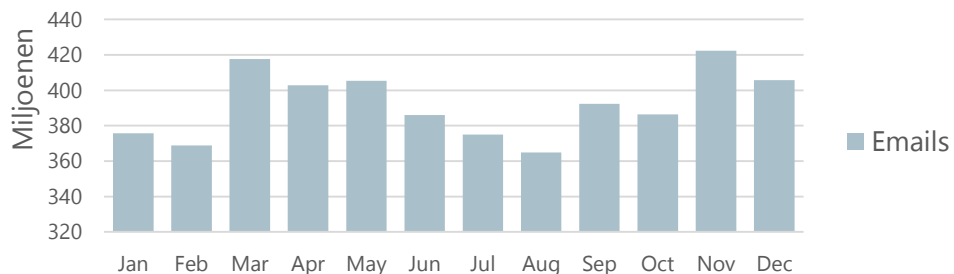Industries

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ℹ The graphs below and on the right visualize the number of emails sent per month, weekday and hour in 2016.

March, November and December were the busiest months. January, February and the summer months experienced a dip in number of emails sent.
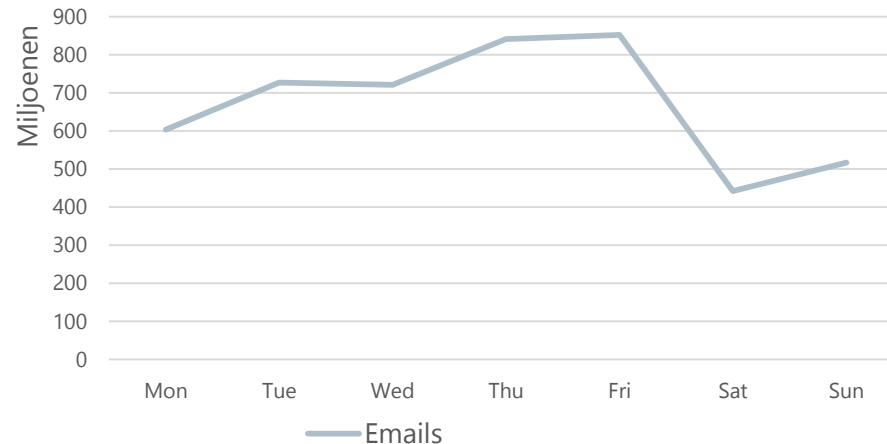
Thursday and Friday dominate as the most popular days when emails are sent whereas Saturday and Sunday have the least amount of sent email volume.

Morning hours are favoured by the companies participating in this research. The least busiest hours in terms of emails sent are between 20:00 and 07:00.
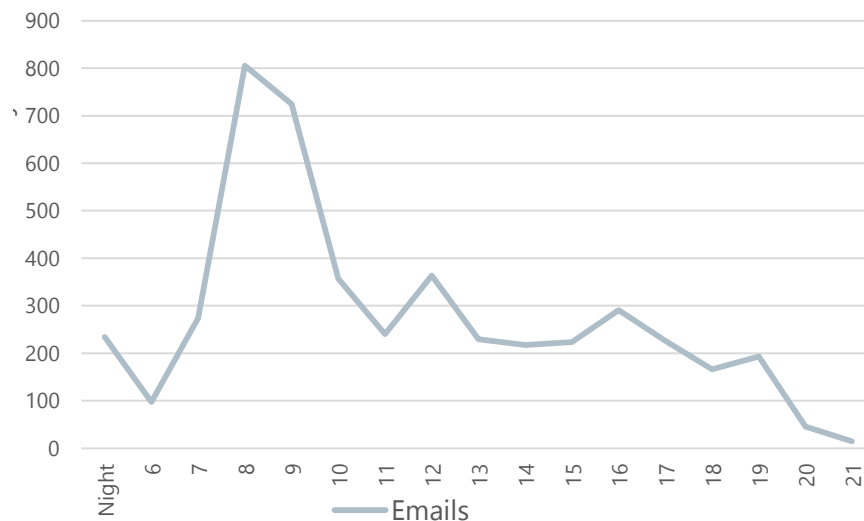
Emails Sent per Month

Emails Sent per Weekday

Emails Sent per Hour

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Mornings have a negative and evenings have a positive impact on COR and CTR

The graphs on this page show the impact of both the hour and the day on which the emails are sent on the COR and CTR.

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

Given the data set of values that proved to have significant effect, we can infer that the impact of the day on which emails are sent is relatively small, only increasing the ratios by 0,6% compared to average. For the COR there is a positive impact when an email is sent on Mondays, Wednesdays and Saturdays and it is negative on Tuesday, Thursdays and Sundays. For the CTR, there is trivial negative effect on Tuesdays, Thursdays and Fridays. When an email is sent on a Saturday, there is a 0,6% increase in the CTR compared to average.

Description

Impact

Impact hour vs. average ratios
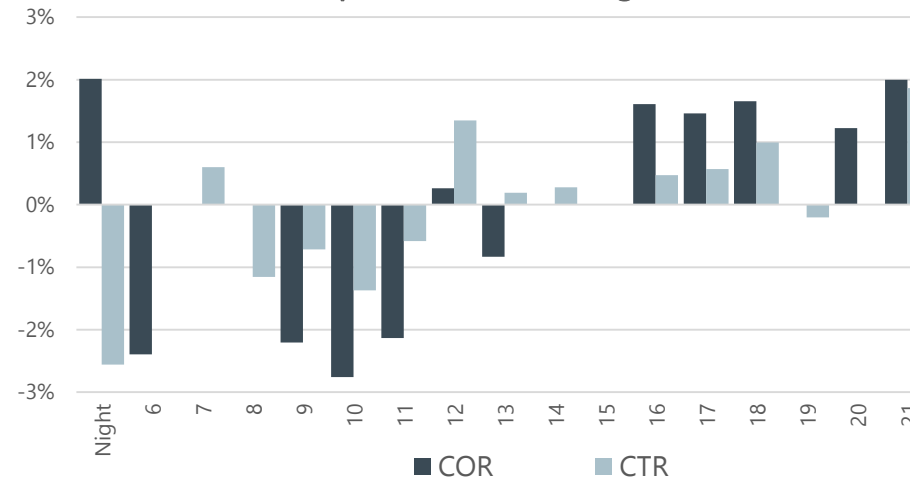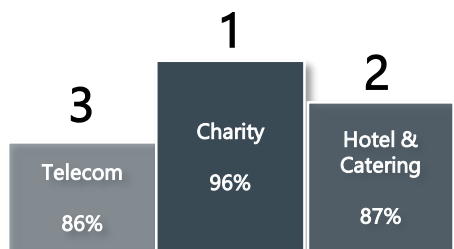
Impact day vs. average ratios
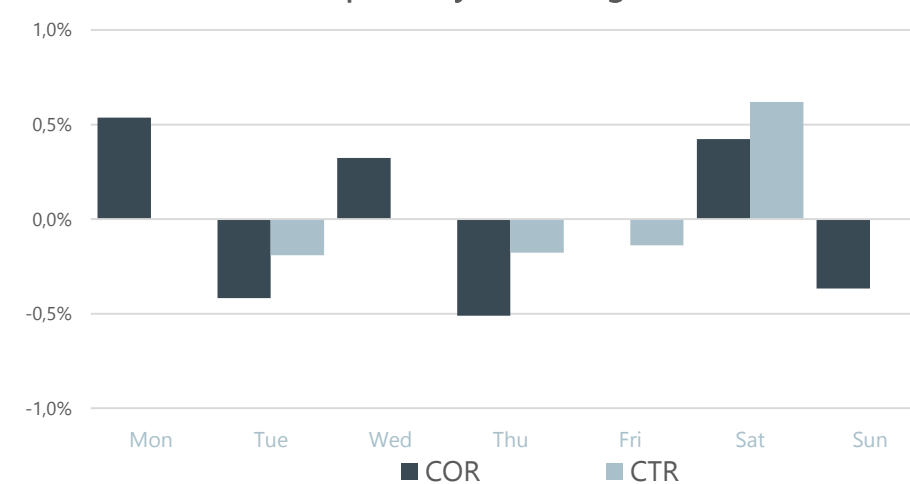
Notes:
1* The percentages shown in these graphs, illustrate the deviation (subtract/add) from the average ratio.
2* Only significant effects (p-value < 0,05) are shown in the graphs.

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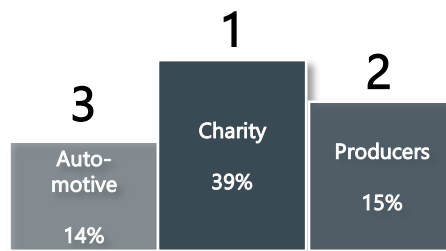# Charity is the most advanced industry in terms of overall technique adoption

Out of these three, responsive design appears to be the most frequently used technique
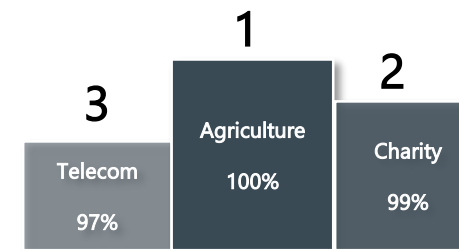
Dynamic content

3 — Telecom 86%

1 — Charity 96%

2 — Hotel & Catering 87%

Adoption

Total	37%
B2C	42%
B2B	25%

Personalised subject line

3 — Auto-motive 14%

1 — Charity 39%

2 — Producers 15%

Adoption

Total	6%
B2C	7%
B2B	5%

Responsive design

3 — Telecom 97%

1 — Agriculture 100%

2 — Charity 99%

Adoption

Total	78%
B2C	82%
B2B	68%

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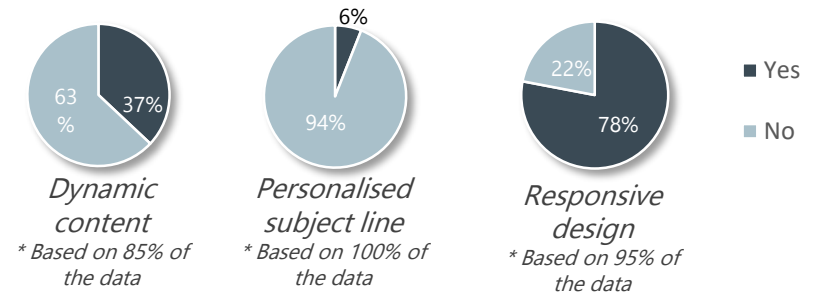# Adoption of techniques improves most ratios, especially dynamic content

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

The right table indicates that all three techniques improve most ratios, both desktop and mobile. In the case of responsive design adoption, results are slightly different, as the adoption effects COR negatively and has a trivial effect on CTR.

In more than half of the campaigns, **dynamic content** is *not* applied. However, when applied, it has the largest positive impact on all ratios. The impact on the mobile opens and clicks is notable with 2,0% and 3,0% increase. **Personalised subject lines** are only used in a small number (6%) of campaigns. The effect translates into small positive improvements of COR and mobile clicks. For CTR and mobile opens, the result did not show statistical significance and thus is not applicable for interpretation.

Responsive design is adopted in more than two thirds of the campaigns. Overall, the use of the technique positively impacts ratios, showing highest impact on mobile opens and clicks at 1,5% and 1,7% respectively. However, it has a negative effect of -2,3% on COR. Considering that responsive design is only visible after opening an email, the negative effect on COR can be attributed to the technical aspect of measuring. A responsive design does improve the ratio of mobile usage vs. desktop.

Were the techniques used in the campaigns?

Dynamic content
* Based on 85% of the data

Personalised subject line
* Based on 100% of the data

Responsive design
* Based on 95% of the data

■ Yes
■ No

Technique	COR	CTR	CTO	% Mobile opens	% Mobile clicks
Dynamic content	+ 1,9%	+ 0,9%	+ 0,7%	+ 2,0%	+ 3,0%
Personalised subject line	+ 0,4%	n/a*	- 0,1%	n/a*	+ 0,3%
Responsive design	- 2,3%	+ 0,2%	+ 0,7%	+ 1,5%	+ 1,7%

Notes:
1* The percentages shown in these graphs, illustrate the deviation (subtract/add) from the average ratio.
2*Only significant effects (p-value < 0,05) are shown in the graphs.

MOBILE USAGE

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

In 2016 40%* of all emails were opened on a mobile device

## Last year this was 36%*

Mobile

i

Mobile usage is becoming increasingly common in today's digital world. We also see this in the percentage of emails that are opened or clicked upon on mobile devices. This is based on all opens and clicks.
The mobile usage (opens) has increased from 36% in 2016 to 40% this year.

In some industries, for example in Hotel & Catering, Leisure and in eCommerce, mobile email opens has already overtaken desktop email opens with 61%, 58% and 53% respectively.

The percentage of clicks shows an increase compared to last year's benchmark with 33%. This year 36% of all clicks came from mobile.
Especially in B2C campaigns the use of mobile devices is more common, with 47% opens and 43% clicks. There is a slower adoption of mobile in B2B campaigns, with almost half the amount of clicks and opens, compared to B2C.

Description

	% Opened On			% Clicked On		
Total	**40%**	**60%**	*100%*	**36%**	**64%**	*100%*
B2C	47%	53%	*100%*	43%	57%	*100%*
B2B	25%	75%	*100%*	22%	78%	*100%*

3
eCommerce
53%

1
Hotel & Catering
61%

2
Leisure
58%
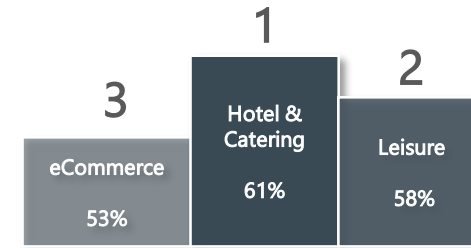
Top 3 industries in which campaigns are most often opened on mobile devices

*The method of mobile opens calculation has changed compared to last year. The 2016 figure mentioned above has been adjusted according to the new technique.
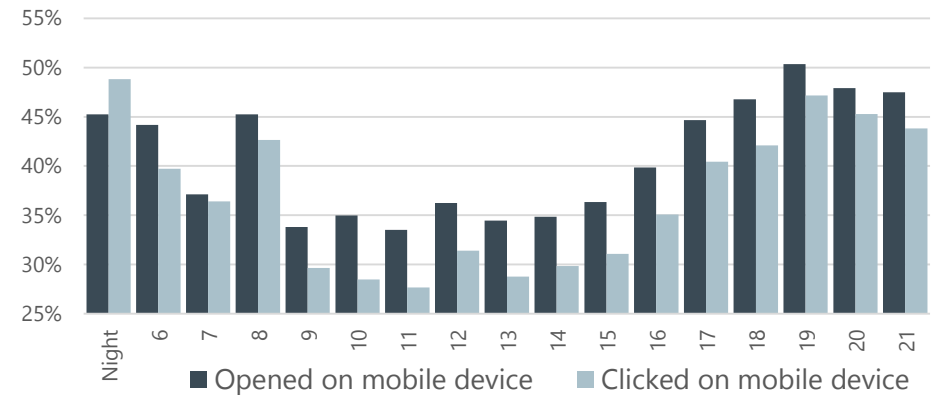
Email campaigns sent outside office hours are opened relatively more frequently on mobile devices

Mobile

These graphs show the percentage of mobile opens and clicks per campaign, by time of the day. The opens and clicks on desktop that together with mobile would add up to 100% per hour, are not depicted in this graph.
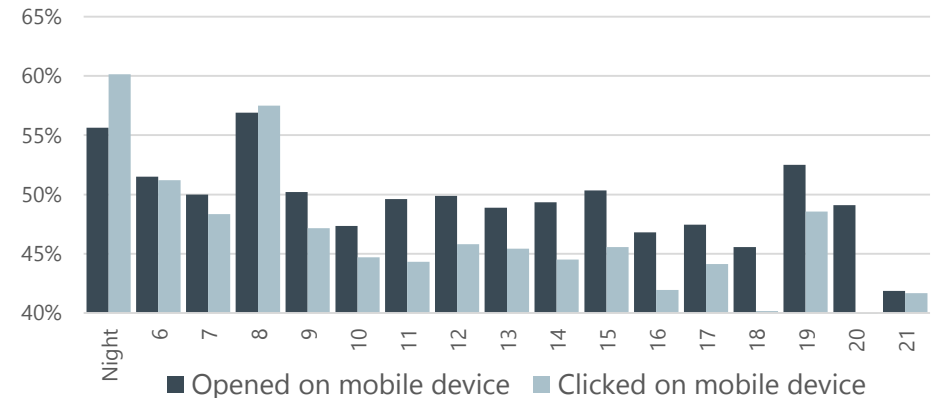
On **working days,** during office hours, desktop dominates the open and click rates. However, after working hours, the mobile open rate almost equalizes and at 19:00 even overtakes desktop opens.

On the **weekend** mobile usage is higher than throughout the week. On weekends, mobile devices are leading for opens, while desktop leads for clicks. Mobile accounted for 51% and 48% of all opens and clicks on weekends. Peak mobile usage was reached at night with 56% (opens), between 8:00 and 9:00 (57%) and between 19:00 and 20:00 (52%).

% Opened On

% Clicked On

	% Opened On			% Clicked On		
Working day	39%	61%	100%	35%	65%	100%
Weekend	51%	49%	100%	48%	52%	100%

Time of day of sending a working day campaign

■ Opened on mobile device ■ Clicked on mobile device

Time of day of sending a weekend campaign

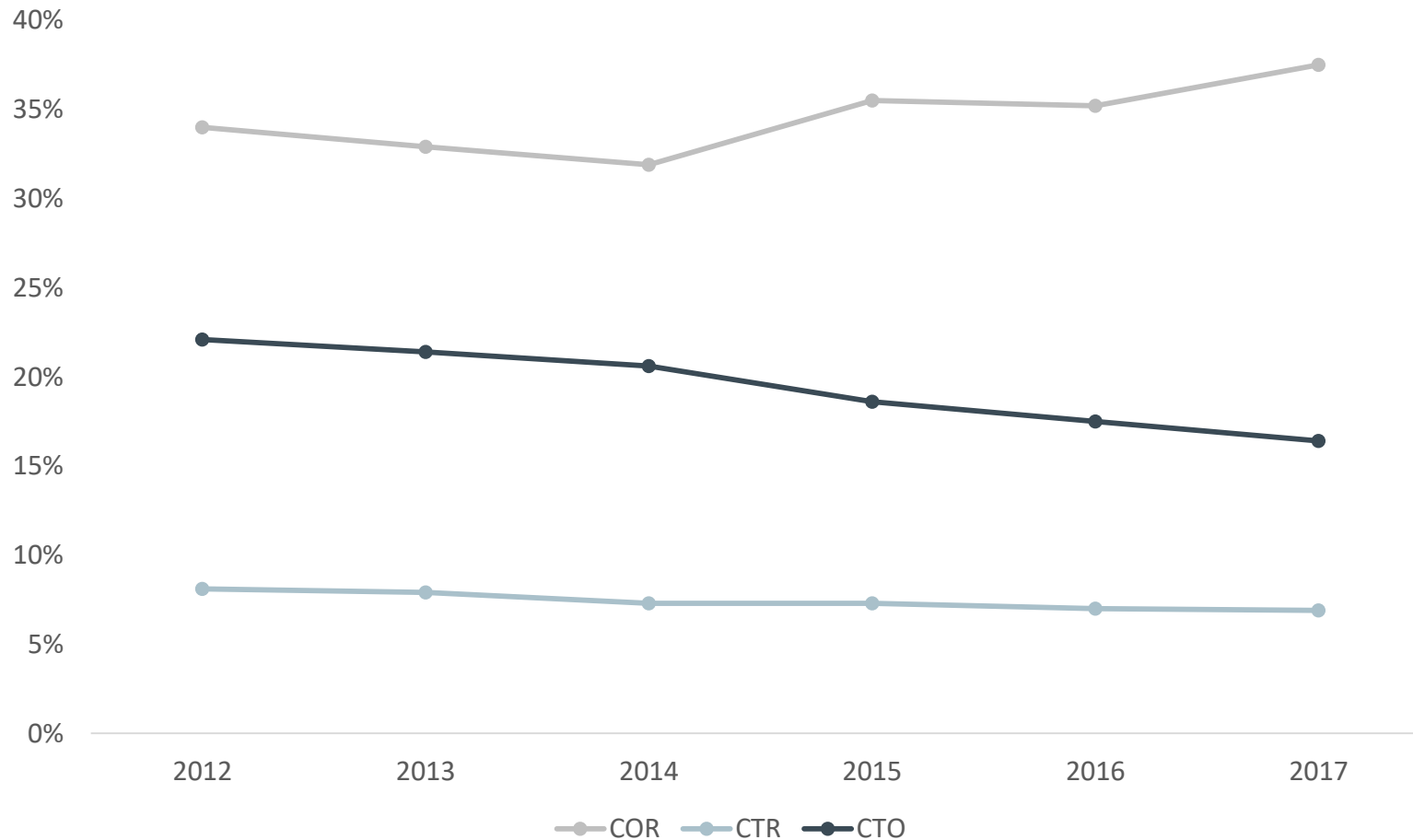■ Opened on mobile device ■ Clicked on mobile device

Trends

This section contains information on trends and the comparison of these with the benchmark of 2016.

Please note that the impact analysis and trend analysis should not be combined in drawing conclusions. The impact analysis statistically analyses the direct relationship, or impact, of one independent variable on another dependent variable. The following trend analysis shows the change in ratios and campaign characteristics, such as size and frequency, and compares these results of 2017 with the ones from the previous year. Therefor, please be cautious when drawing conclusions. For example, even though the dynamic content has a positive impact on the CTR, this does not directly conclude that the CTR should increase with an increase in dynamic content.

The COR has increased and CTO has declined over the years, whilst the CTR has remained constant

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Historic Benchmark Data (2012 -2017)

COR — CTR — CTO

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COR, CTR and CTO – Industry level comparison with 2016

Ratios - Overall

Ratios - Industry

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The Confirmed Open Rate increased slightly from 35,2% in 2015 to 37,5% in 2016. The industries with the largest (absolute) increase are Energy and Natural Resources (59,0% to 69,6%), Business services (35,2% to 44,4%) and Construction services (45,4% to 54,4%). For five industries (Hotel & Catering, Charity, Industry & Producers, Retail (mixed) and Transportation and logistics) there was a decrease in confirmed open rate.

The Click Through Rate stayed relatively constant with 7,0% in 2016 and 6,9% in 2017. For 9 industries we notice a small increase in CTR, whereas a slight decrease in CTR is observed in 15 industries. The largest increases are seen in Construction services (12,0% to 15,3%), Telecom Services & Equipment (10,4% to 12,4%) and Agriculture (7,2% to 9,1%). The largest decreases in CTR are shown in Energy & Natural resources (16,1% to 11,8%), Hotel & Catering (3,2% to 1,8%) and Charity (16,6% to 15,4%).

The CTO slightly decreased from 17,5% in 2016 to 16,4% in 2017, due to the increase in COR and the constant CTR. However, there are 6 industries for which an increase in CTO is seen relative to 18 industries which show a decrease in CTO. The largest increases are seen in Leisure (15,7% to 18,8%), Transportation & Logistics (16,4% to 19,4%) and Agriculture (18,2% to 20,9%). The largest decreases are seen in Hotel & Catering (15,9% to 6,5%), Energy & Natural Resources (24,9% to 16,2%) and Charity (27,2% to 23,7%).

Top 3 industries with the largest increases in COR, CTR and CTO

COR

1 — Energy — 59% → 70%
2 — Business Services — 35% → 44%
3 — Construction — 45% → 54%

CTR

1 — Construction — 12% → 15%
2 — Telecom — 10% → 12%
3 — Agriculture — 7% → 9%

CTO

1 — Leisure — 16% → 19%
2 — Logistics — 16% → 19%
3 — Agriculture — 18% → 21%
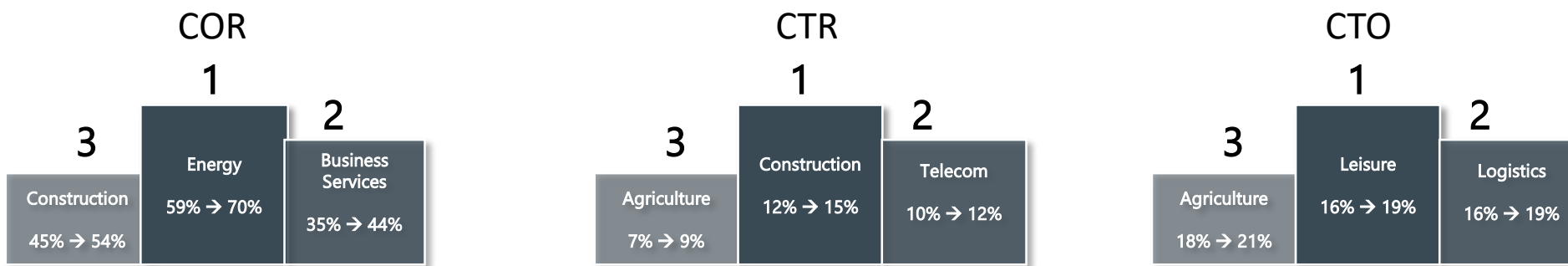
*All displayed changes in percentages are "absolute" changes and not relative changes. They are calculated as the new percentage minus the old percentage.
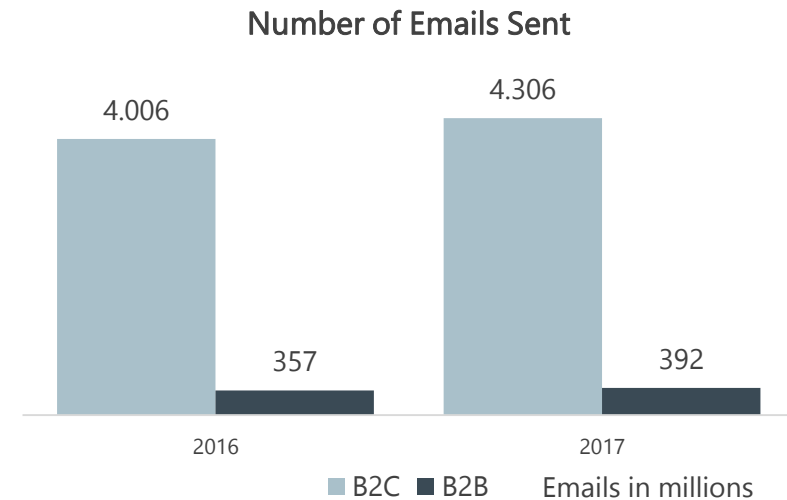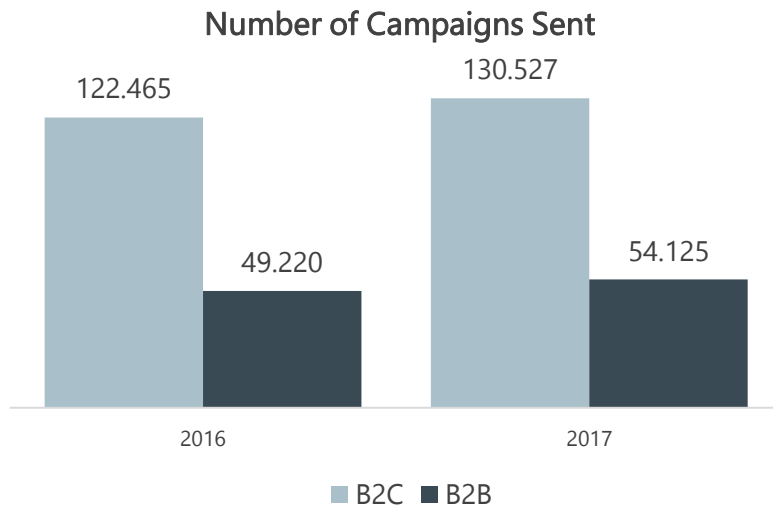
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The number of campaigns increased, the average campaign size stayed consistent

i

The number of campaigns sent by companies participating in the research **has increased by 8%,** from 171.684 in 2015 to **184.784 in 2016.** The increase in B2B of 10% is slightly larger than the increase of 7% in B2C.

The **total number of emails sent has increased** by the same 8% overall, from 4.363 million emails in 2015 towards 4.703 million emails in 2016. Consequently, the average campaign size stayed the same** (25k). Furthermore, the distribution of campaign size among the buckets has remained constant.

The number of companies that participated in the research has decreased by 3%, from 2.976 in 2015 to 2.901 in 2016. Simultaneously, the **average email frequency increased with 10%**, from 58 in 2015 towards 64 in 2016.

Number of Campaigns Sent

122.465   130.527

49.220   54.125

2016   2017

■ B2C ■ B2B

Number of Emails Sent

4.006   4.306

357   392

2016   2017

■ B2C ■ B2B   Emails in millions

* Campaigns with "missing" B2B/B2C classification are not shown in the graph

** The approach of the average campaign size differs from the one in the report of 2016.
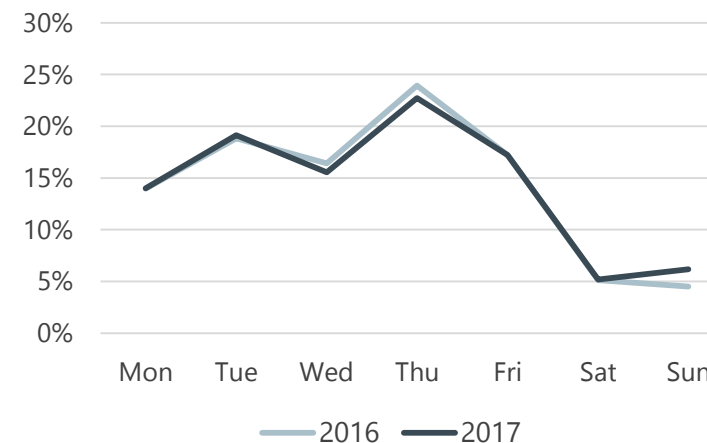For the comparison we used the same approach for both 2016 as 2017.

* Campaigns with "missing" B2B/B2C classification are not shown in the graph

The percentage of campaigns sent during office hours decreased slightly

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i In 2017, 72% of the campaigns are sent during office hours (Monday – Friday, 8.00-18.00), compared to 75% in 2016. When looking at the entire week (working days and weekend), we see a slight increase in the proportion of campaigns sent in the evening and night (18.00 – 6.00), from 14% in 2016 to 16% in 2017. The percentage of campaigns sent in the early morning (6.00 – 8.00) slightly increased from 4% in 2016 to 5% in 2017. During the daytime (8.00-18.00) it decreased slightly from 82% in 2016 to 78% in 2017.

The number of campaigns sent during working days stayed reasonably consistent, with 90% in 2016 compared to 89% in 2017.
From the months chart we observe a similar pattern in 2017 as in 2016, except for some small changes in the last 3 months of the year. In contrast to the 2016 benchmark where the period of September to December was the busiest, we now see a small drop in this year's benchmark in the months of October and December.
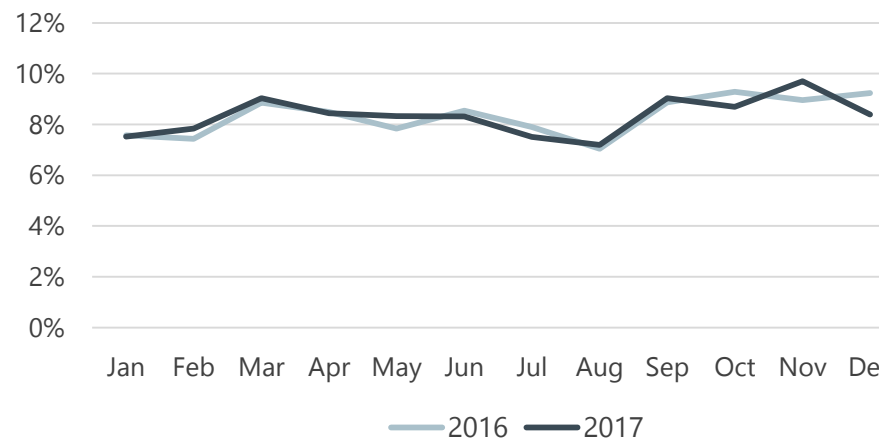
Day sent (campaigns)

2016 — 2017

Hour sent (campaigns)

2016 — 2017

Month sent (campaigns)

2016 — 2017

Overall ratios

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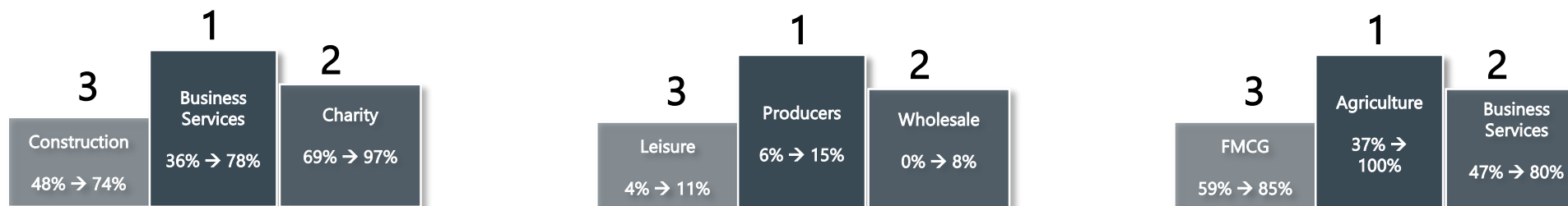
Appendix
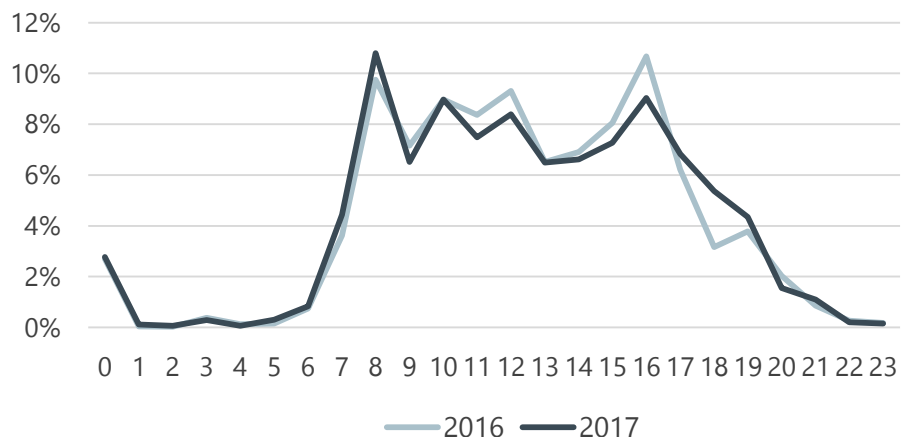
Trends

The adoption rate of all techniques has increased

i The adoption of all three techniques measured in this benchmark has increased compared to the 2016 findings.
The adoption of dynamic content slightly increased from 35% in 2016 to 37% in 2017. This increase is seen in both B2C and B2B, but a larger increase is shown for B2B. The largest increase can be observed in the adoption of personalised subject line, which rose for both B2B and B2C, resulting in an overall increase from 4% to 6%. The largest absolute growth is seen in the adoption of responsive design, which increased from 68% in 2016 to 78% in 2017. For B2B this increase is even larger than for B2C.

Dynamic content

	2016	2017
Total	35%	37%
B2C	41%	42%
B2B	18%	25%

Personalised subject line

	2016	2017
Total	4%	6%
B2C	5%	7%
B2B	3%	5%

Responsive design

	2016	2017
Total	68%	78%
B2C	73%	82%
B2B	56%	68%

Top 3 industries with the largest increases*

Dynamic content
- 3 Construction 48% → 74%
- 1 Business Services 36% → 78%
- 2 Charity 69% → 97%

Personalised subject line
- 3 Leisure 4% → 11%
- 1 Producers 6% → 15%
- 2 Wholesale 0% → 8%

Responsive design
- 3 FMCG 59% → 85%
- 1 Agriculture 37% → 100%
- 2 Business Services 47% → 80%

*All shown changes in percentages are "absolute" changes and not relative changes. It is calculated as the new percentage minus the old percentage.

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Ratios - Overall

Ratios - Industry

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Mobile usage

The mobile opens and clicks have increased

The percentage of opens on a mobile device increased from 36% in 2016* to 40% in 2017. The percentage of clicks on a mobile device increased from 33% in 2016 towards 36% in 2017. For both B2C and B2B we notice increases in mobile usage. Looking at the mobile usage per industry it is clear that the **mobile usage increased in all industries**. The industries with the largest increase in mobile usage (opens) are Hotel & Catering (45% to 61%), Telecom (41% to 51%) and Banking & Insurance (24% to 34%). The smallest increases are seen in Wholesale (37% to 39%), Industry & producers (19% to 22%) and Business services (27% to 30%). For the mobile usage in clicks we see that similar industries increased the most.

% Opened on mobile* (mobile & tablet)

	2016	2017	Change**
Total	36%	40%	*4%*
B2C	42%	47%	*5%*
B2B	23%	25%	*2%*

% Clicked on mobile* (mobile & tablet)

	2016	2017	Change**
Total	33%	36%	*3%*
B2C	40%	43%	*3%*
B2B	20%	22%	*2%*

Top 3 industries with the largest increases in mobile opens**

```
        1
  3    Hotel &      2
       Catering
Banking           Telecom
       45% → 61%
24% → 34%         41% → 51%
```
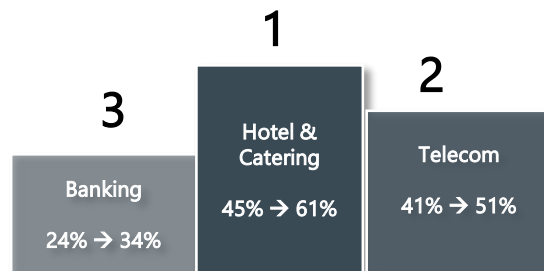
Top 3 industries with the largest increases in mobile clicks**

```
        1
  3    Hotel &      2
       Catering
Leisure           Telecom
       35% → 54%
42% → 49%         37% → 47%
```
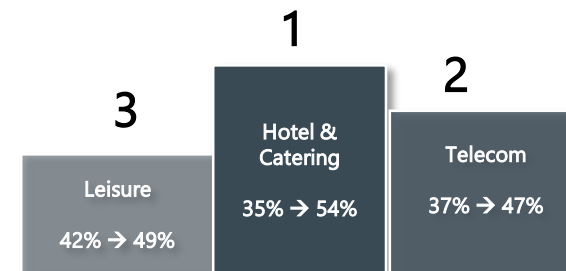
* The percentages mobile usage are based on total opens and total clicks. This approach differs from the report of 2016. For the comparison we used the same approach for both years.
** All shown changes in percentages are "absolute" changes and not relative changes. It is calculated as the new percentage minus the old percentage

INDUSTRIES

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

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Media and Publishing, eCommerce and Retail account for 49.9% of the emails sent in 2016

Media and Publishing has sent the highest number of campaigns in this study. In this sector consumers receive a relatively large amount of campaigns.

Even though eCommerce only has the second largest industry share campaign wise, it sends the most, 35,8%, of all emails. This discrepancy is explained by the very high average campaign size.

The top 3 industries featured in the research data set are Media & Publishing with 13.2%, eCommerce with 11,5% and Retail with 5,3% of all campaigns sent.

Out of the emails sent by companies in other/unknown industries, 16,6% of these industries were unidentified in the data set and 2% belong to other industries.

Industry share
Campaigns sent per year

3 Retail 5,3%
1 Media 13,2%
2 eCommerce 11,5%
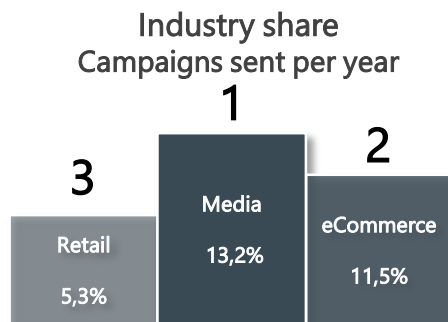
Industry	Campaigns	Emails (millions)
Media & Publishing	24.417 (13,2%)	389 (8,3%)
eCommerce	21.250 (11,5%)	1.684 (35,8%)
Retail (mixed)	9.815 (5,3%)	274 (5,8%)
Business Services	9.726 (5,3%)	107 (2,3%)
Culture & Entertainment	7.039 (3,8%)	142 (3,0%)
Education	6.034 (3,3%)	47 (1,0%)
Leisure	5.569 (3,0%)	178 (3,8%)
Telecom Services & Equipment	5.451 (2,9%)	79 (1,7%)
Banking & Insurance	3.388 (1,8%)	36 (0,8%)
Energy & Natural Resources	3.374 (1,8%)	21 (0,4%)
Hotel & Catering	2.872 (1,6%)	204 (4,3%)
Healthcare	2.428 (1,3%)	30 (0,6%)
Travel	2.339 (1,3%)	291 (6,2%)
Construction Services	2.223 (1,2%)	25 (0,5%)
Charity	2.185 (1,2%)	124 (2,6%)
Government	2.023 (1,1%)	15 (0,3%)
Automotive	1.856 (1,0%)	89 (1,9%)
Not-for-Profit	1.827 (1,0%)	23 (0,5%)
Industry & Producers	1.788 (1,0%)	9 (0,2%)
Agriculture	1.129 (0,6%)	5 (0,1%)
ICT & Internet	1.078 (0,6%)	18 (0,4%)
Wholesale	739 (0,4%)	7 (0,2%)
Transportation & Logistics	705 (0,4%)	5 (0,1%)
Fast Moving Consumer Goods	416 (0,2%)	4 (0,1%)
Other / Unknown	65.113 (35,2%)	896 (19,1%)
	184.784	4.703

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

Industries

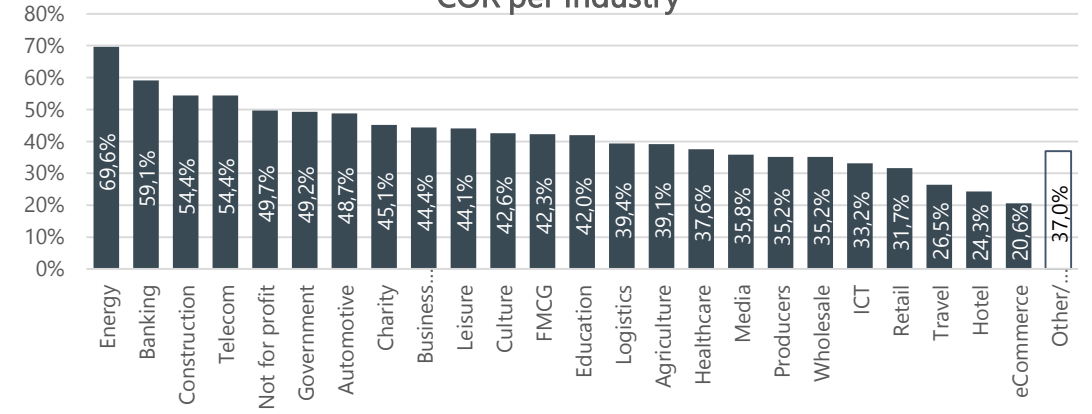## The energy and construction industries have the highest overall ratios

The graphs visualise the COR, CTR and CTO per industry, ranking each from high to low. Strong variations between industries are visible. *Construction* and *Charity* dominate for all three ratios.

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

Example: Some industries, such as the telecom and energy industries, often sell yearly subscriptions. Consumers are more likely to open or click on campaigns that are distributed around the time their subscription ends, simply because the timing makes them more relevant. In some industries, companies can anticipate this however for other industries, for example in eCommerce, this is not the case. Such industries have seasonal stock, sell multiple items a year and have a broad variety of articles in their web shops.

COR per Industry

Energy	Banking	Construction	Telecom	Not for profit	Government	Automotive	Charity	Business...	Leisure	Culture	FMCG	Education	Logistics	Agriculture	Healthcare	Media	Producers	Wholesale	ICT	Retail	Travel	Hotel	eCommerce	Other/...
69,6%	59,1%	54,4%	54,4%	49,7%	49,2%	48,7%	45,1%	44,4%	44,1%	42,6%	42,3%	42,0%	39,4%	39,1%	37,6%	35,8%	35,2%	35,2%	33,2%	31,7%	26,5%	24,3%	20,6%	37,0%

CTR per Industry

Charity	Construction	Telecom	Energy	Banking	Government	Automotive	Leisure	Agriculture	Logistics	Education	FMCG	Healthcare	Media	Business...	Culture	Not for profit	Producers	ICT	Retail	Wholesale	Travel	eCommerce	Hotel	Other/...
15,4%	15,3%	12,4%	11,8%	11,0%	10,6%	10,4%	9,1%	9,1%	8,2%	8,0%	8,0%	7,8%	7,6%	7,4%	6,5%	6,4%	5,9%	4,8%	4,5%	4,4%	3,0	2,	1	6,7%

CTO per Industry

Construction	Charity	Agriculture	Automotive	Healthcare	Telecom	Government	Media	Logistics	Leisure	Banking	Education	FMCG	Business...	Energy	Producers	Retail	Culture	ICT	Not for profit	eCommerce	Wholesale	Travel	Hotel	Other/...
25,5%	23,7%	20,9%	20,4%	20,2%	20,1%	19,9%	19,6%	19,4%	18,8%	18,0%	17,9%	17,3%	16,5%	16,2%	16,1%	13,8%	13,6%	12,3%	12,2%	11,6%	11,4%	10,8%	6,5%	16,6%

Media and publishing (1/2): small campaigns with the highest campaign frequency resulting in slightly above average ratios

The media and publishing industry includes 389 million emails sent in 24.417 campaigns.

Ratios:	Slightly above average
Average campaign size*:	Small, 16k compared to 25k on average
Campaign frequency*:	Very high, 317, five times the average of 64
Timing:	Focus on office hours, high peak between 12:00 and 01:00
Technique adoption:	Above average on DC and RD, very low on personalised subject line
Mobile usage:	Slightly above average on opens, below average on clicks

Adoption techniques	B2C	B2B
Dynamic content	47%	46%
Personalised subject line	1%	0%
Responsive design	92%	84%

	👁	🖱	🖱/👁
Total	**35,8%**	**7,6%**	**19,6%**
B2C	36,7%	7,7%	19,1%
B2B	34,6%	7,5%	20,4%

% Mobile device	B2C	B2B
Opens	47%	32%
Clicks	37%	20%
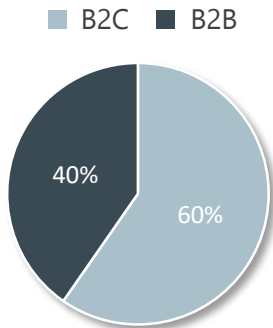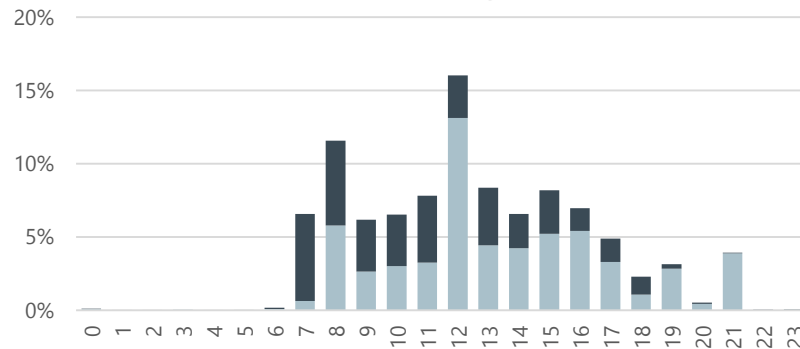
B2C ■ B2B

Pie chart: B2B 40%, B2C 60%

Hour sent (campaigns)

Day sent (campaigns)

Month sent (campaigns)

* These numbers can be found in the appendix

Industries
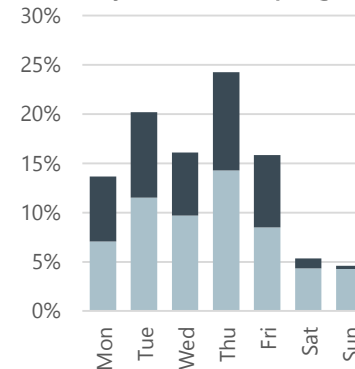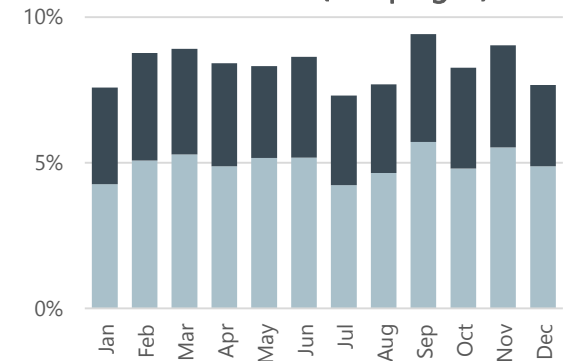
Media and publishing (2/2): Emails sent on weekends and outside office hours positively impact the COR and the CTR

For the media and publishing industry, the weekend, especially Sunday, shows the best COR and CTR. This differs from the overall benchmark where campaigns sent on Sundays have a small negative impact on the COR. Just like the overall benchmark we see a negative impact on the COR and CTR when campaigns are sent on both Tuesdays and Thursdays.

The highest impact of timing on the COR and CTR is found outside office hours, which is in line with the overall benchmark. In general, emails sent in the evening between 18:00 and 22:00, show an increase in the COR and CTR compared to average.

All techniques show either a negative or insignificant impact. This is not in line with the overall impact analysis, except for the negative impact of responsive design on the COR. 210 or 0,9% of the campaigns used a personalised subject line in the media and publishing industry. Responsive design was used by 89,2% with a -3,5% impact on COR and dynamic content was adopted by 46,4% decreasing COR by -0,5% and decreasing CTR by -1,3%. With the available data, no explanation is found for why they should perform considerably less.

Technique (% known in data)	COR	CTR
Dynamic content (53%)	- 0,5%	- 1,3%
Personalised subject line (100%)	- 1,3%	- 0,6%
Responsive design (87%)	- 3,5%	n/a*

Notes:
1* The percentages shown in these graphs, illustrate the deviation (subtract/add) from the average ratio.
2* Only significant effects (p-value < 0,05) are shown in the graphs.

Impact day vs. average ratios

COR   CTR   Emails

Impact hour vs. average ratios

COR   CTR   Emails

Industries

General Information

Media

eCommerce

Retail

Business Services

Culture

Education

Leisure

Telecom

Banking

...
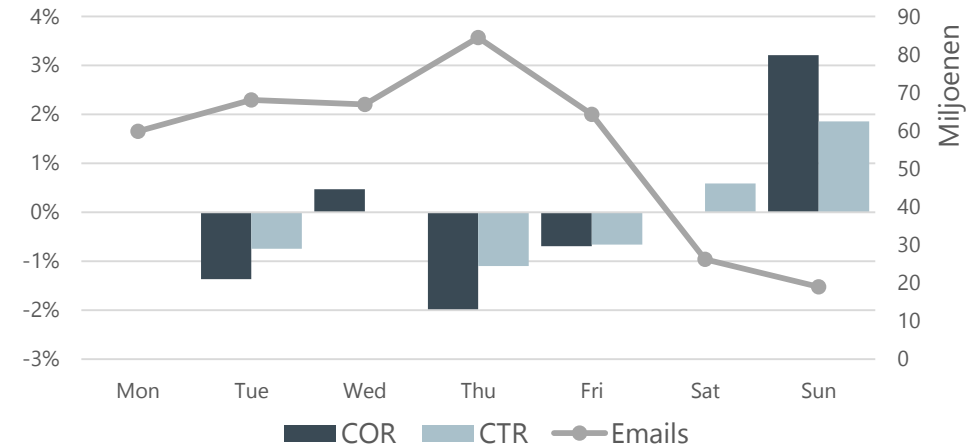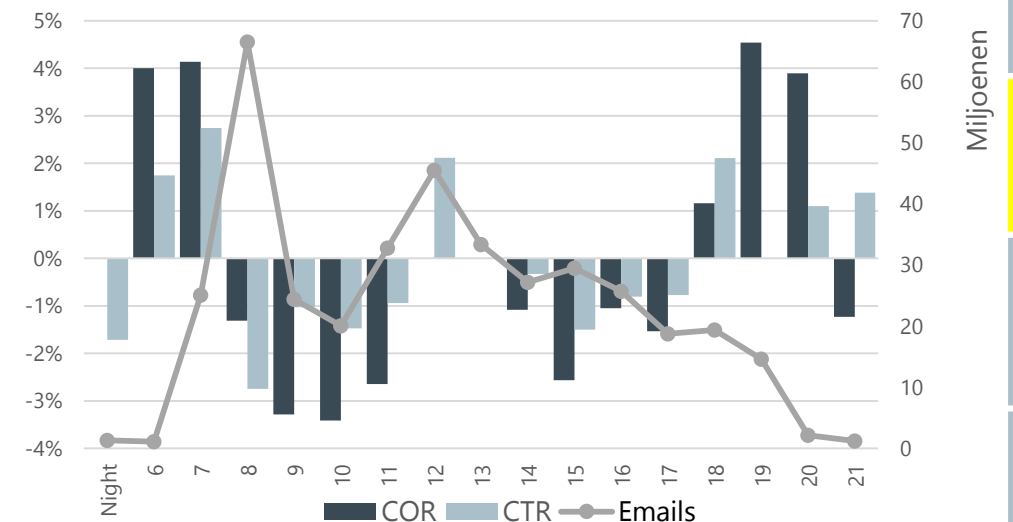
# eCommerce (1/2): Highest email volume resulting in low ratios, high mobile device usage

The eCommerce industry is big with 1,68 billion emails sent in 21.250 campaigns.

Ratios:	Low, both COR and CTR
Average campaign size*:	Very large with 79k compared to 25k on average
Campaign frequency*:	Very high, 4 times the average
Timing:	Focus on early morning hours, campaigns distributed evenly during the week, and high number is sent during weekends compared to average
Technique adoption:	The adoption of responsive design is very high, whereas personalised subject lines are hardly used.
Mobile usage:	High

	👁	🖱	🖱⃠
Total	20,6%	2,6%	11,6%
B2C	20,4%	2,6%	11,8%
B2B	27,1%	1,8%	6,0%
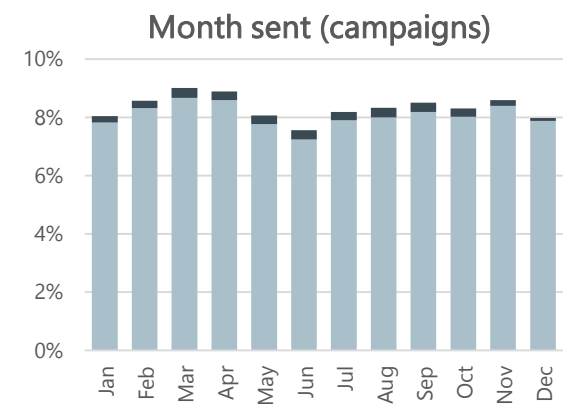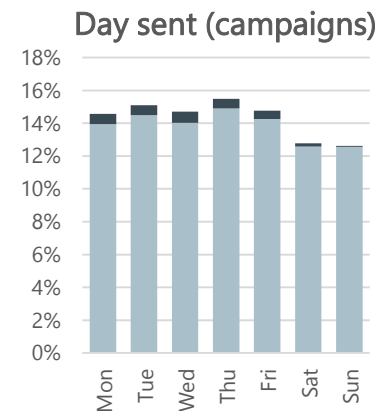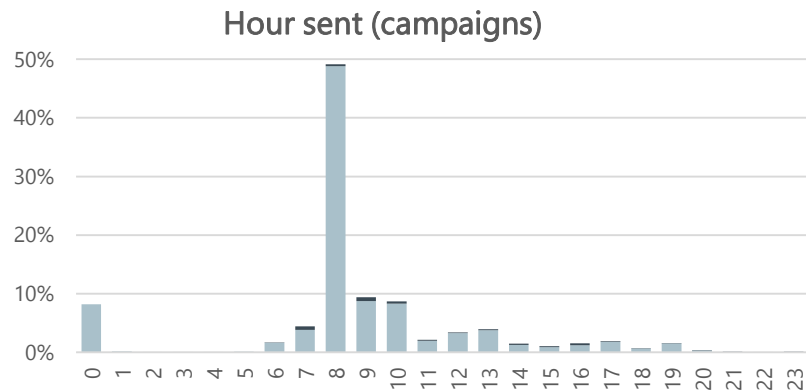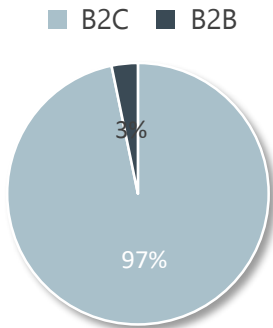
Adoption techniques	B2C	B2B
Dynamic content	54%	0%
Personalised subject line	1%	0%
Responsive design	98%	0%

% Mobile device	B2C	B2B
Opens	53%	44%
Clicks	54%	42%

B2C ■ **B2B**

(Pie chart) 3% / 97%

Hour sent (campaigns)

Day sent (campaigns)

Month sent (campaigns)

* These numbers can be found in the appendix

Industries

eCommerce (2/2): High ratios at 08:00 and at night, large drop at 06:00, 07:00 and 10:00. Sundays negatively impact ratios.

For retail (eCommerce only) we observe that the day of the week on which an email is sent has a small impact on COR and CTR. The highest impact days are Mondays and Tuesdays, on which the COR rate increases by 0,53% and 0,31% respectively compared to average. E-mails sent on Sundays experience a drop of 0.71% in the COR and of -0,12% in the CTR by in relation to the average rate.

Between 08:00 and 09:00, from 19:00 to 21:00 and at night are the best times to send email campaigns in the retail (eCommerce only) industry. Sending an email at the latter times can increase the COR and CTR rates. Additionally, according to statistical analysis, there are also three times of the day during which sending a campaign would negatively affect the open and click rates. The times to be avoided are 06:00 - 08:00, 10:00 – 11:00 (COR -6,25% and CTR at -1,13%) and 12:00 – 14:00.

Dynamic content is used in approximately half of the campaigns and lowers the COR on average by -1,6% but increases the CTR with 1,2%. A personalised subject line is rarely used in the retail (eCommerce only) industry and seems to have a small but negative effect. Responsive design is vastly used with a 95% adoption rate and works remarkably well in this industry, improving the COR by 6,1%.

Technique (% known in data)	COR	CTR
Dynamic content (99%)	- 1,6%	+ 1,2%
Personalised subject line (100%)	n/a*	- 0,2%
Responsive design (100%)	+ 6,1%	- 0,2%

Notes:
1* The percentages shown in these graphs, illustrate the deviation (subtract/add) from the average ratio.
2 *Only significant effects (p-value < 0,05) are shown in the graphs.

Impact day vs. average ratios

COR ▪ CTR ▪ Emails

Impact hour vs. average ratios

COR ▪ CTR ▪ Emails
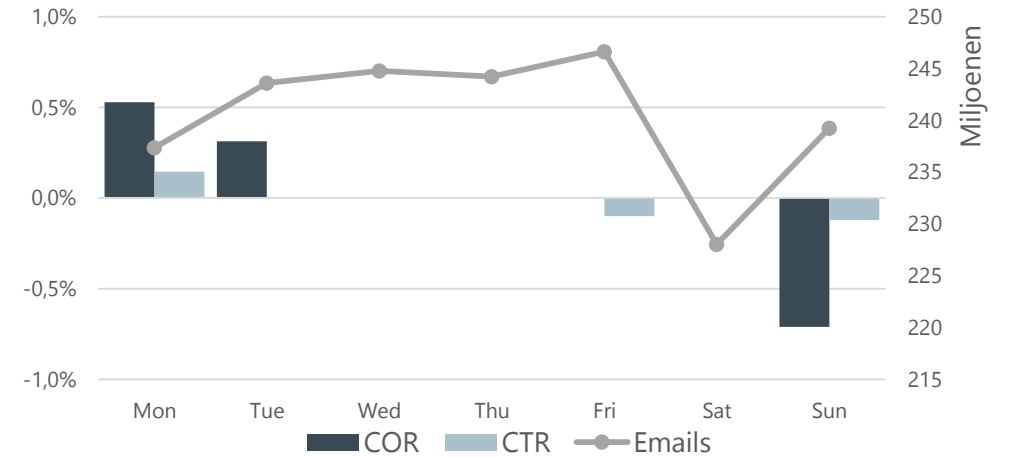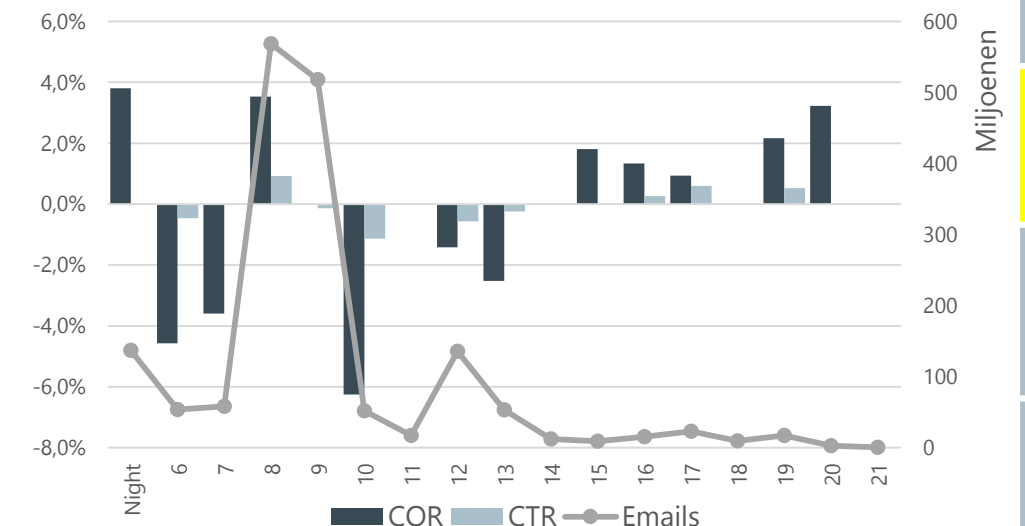
Retail (mixed) (1/2): Low CTR and 49% of campaigns sent between 16:00 and 20:00

Industries

- General Information
- Media
- eCommerce
- **Retail**
- Business Services
- Culture
- Education
- Leisure
- Telecom
- Banking
- ...

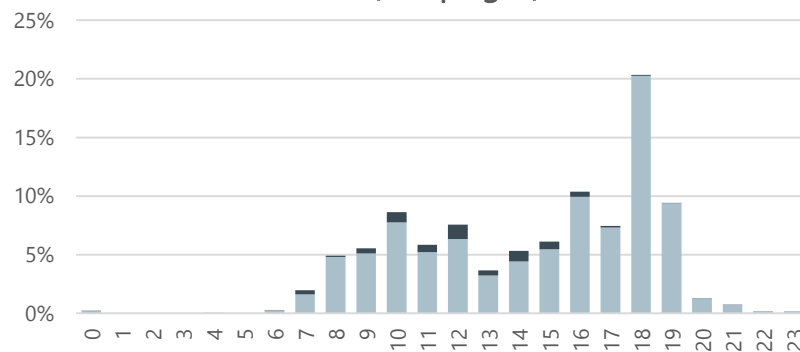*Sidebar right:* Overall ratios | Size and Frequency | Timing | Techniques | Mobile | Trends | **Industries** | Reading guide | Appendix

ℹ In the retail (mixed) industry 274 million emails are sent in 9.815 campaigns.

Ratios:	Low, especially CTR (4,5% compared to 6,9%)
Average campaign size*:	Slightly above average
Campaign frequency*:	Low
Timing:	Friday and Sunday are by far the most popular days accounting for 40% of all campaigns. In B2C, 47% of campaigns are sent between 16:00 and 20:00.
Technique adoption:	Average responsive design. Dynamic content falls below average and the personalised subject lines adoption is very low
Mobile usage:	Average

	👁	🖱	🖱̸
Total	**31,7%**	**4,5%**	**13,8%**
B2C	31,7%	4,6%	14,0%
B2B	30,7%	3,6%	10,9%

Adoption techniques	B2C	B2B
Dynamic content	34%	26%
Personalised subject line	3%	0%
Responsive design	79%	70%

% Mobile device	B2C	B2B
Opens	49%	17%
Clicks	44%	17%
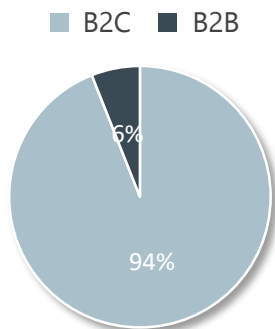
Legend: ■ B2C ■ B2B

Pie chart: 94% / 6%

Hour sent (campaigns)

Day sent (campaigns)

Month sent (campaigns)

* These numbers can be found in the appendix

Industries

General Information

Media

eCommerce

Retail

Business Services

Culture

Education

Leisure

Telecom

Banking

...
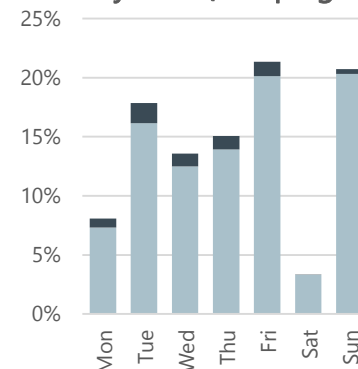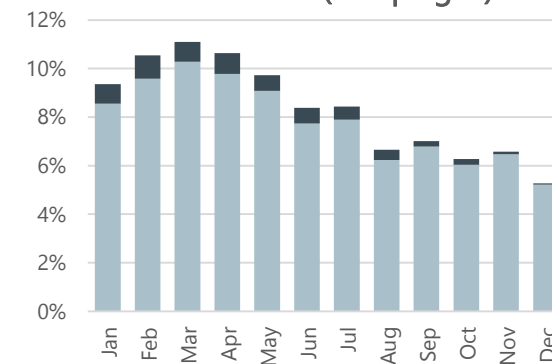
Retail (mixed) (2/2): Saturdays and early mornings (6:00 – 7:00) have a positive impact on COR and CTR.

For retail (mixed), the day of the week on which a campaign is sent has a small impact on the ratios. Many results showed no statistical significance and thus were omitted. Saturday shows the largest impact out of the weekdays on which a campaign is sent, increasing the COR by 1,23% from average. Sunday shows a -0,95% decrease on the COR, but seems to have a positive impact of 0,47%. on the CTR.

Time wise, the highest open and click rate is between 06:00 and 07:00 translating in a staggering 10,38% COR and 3,76% CTR increase. Second best is when an email is sent between 20:00 and 21:00, resulting in a 3,89% COR and 0,78% CTR improvement compared to average. Sending emails between 19:00 and 20:00 show a negative impact on the COR (-6,40%) and CTR (-1,64%).

Dynamic content is used in 33,6% of the campaigns and increases the COR by a notable 3,8% compared to average. Additionally, CTR increases with 1,8% when dynamic content is used. A personalised subject line is hardly (2,8%) used in the retail (mixed) industry and seems to lower the COR with -1,8% and the CTR with -0,3% in the case when it is. Responsive design is used in more than three quarters of the campaigns, but decreases the COR by -3,4% and the CTR by -0,9%.

Technique (% known in data)	COR	CTR
Dynamic content (80%)	+ 3,8%	+ 1,8%
Personalised subject line (100%)	- 1,8%	- 0,3%
Responsive design (97%)	- 3,4%	- 0,9%

Notes:
1* The percentages shown in these graphs, illustrate the deviation (subtract/add) from the average ratio.
2* Only significant effects (p-value < 0,05) are shown in the graphs.

Impact day vs. average ratios
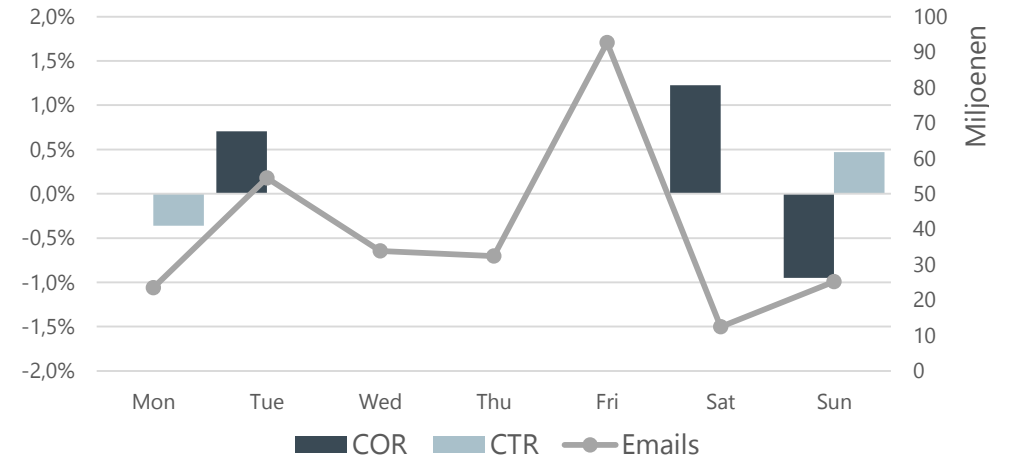
Impact hour vs. average ratios
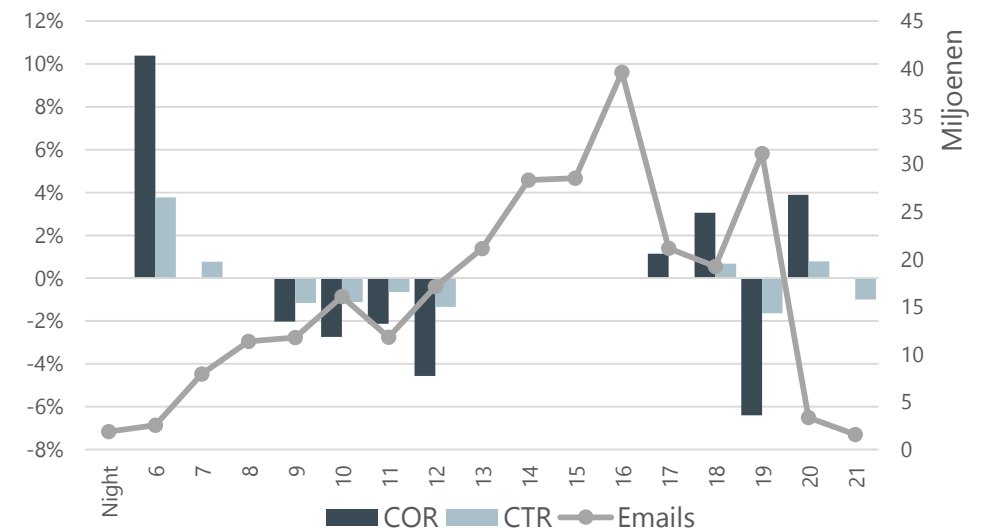
Business services(1/2): Slightly above average ratios and very small average campaign size yet high adoption of techniques

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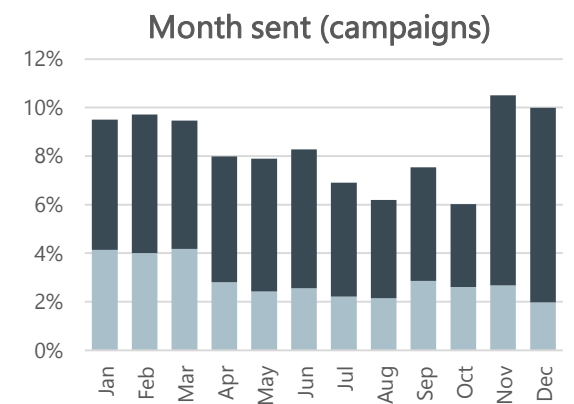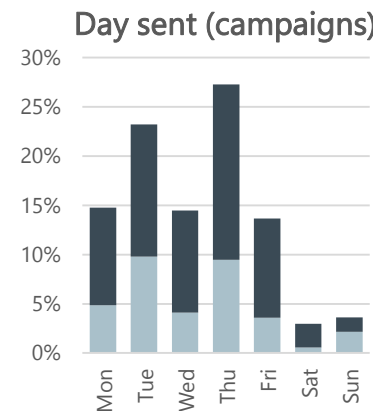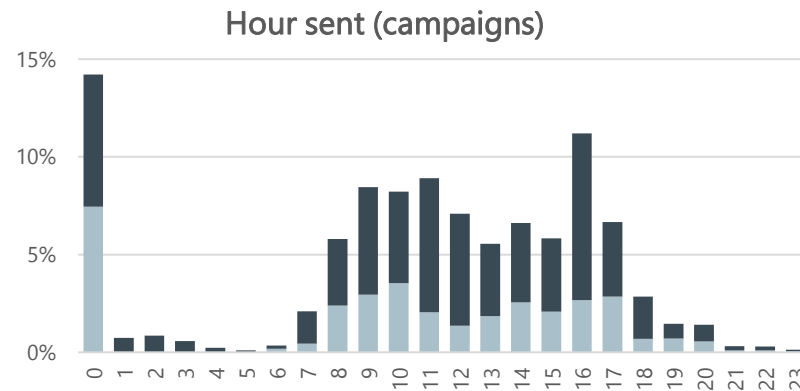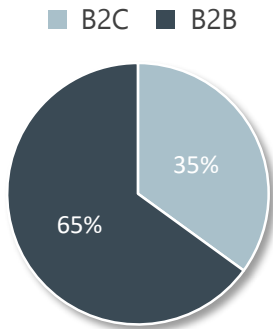**In the business services industry 107 million emails are sent in 9.726 campaigns.**

Ratios:	Slightly above average
Average campaign size*:	Very small, with 11k compared to 25k on average
Campaign frequency*:	Average
Timing:	Strong focus on office hours and a peak at midnight
Technique adoption:	Dynamic content and personalised subject (B2B) very high, responsive design slightly above average
Mobile usage:	Slightly above average on opens, Slightly below average on clicks

Adoption techniques	B2C	B2B
Dynamic content	86%	75%
Personalised subject line	3%	16%
Responsive design	89%	76%

	👁	🖱	🖱/
Total	**44,4%**	**7,4%**	**16,5%**
B2C	45,1%	7,7%	17,1%
B2B	44,0%	7,3%	16,3%

% Mobile device	B2C	B2B
Opens	39%	27%
Clicks	34%	21%

■ B2C ■ B2B

[Pie chart: B2C 35%, B2B 65%]

Hour sent (campaigns)

Day sent (campaigns)

Month sent (campaigns)

* These numbers can be found in the appendix

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Business Services(2/2): High COR and CTR after 16:00, positive impact of dynamic content use

In the business services industry we see that Mondays and Saturdays have a small but positive impact on COR, increasing it by 1,02% and 2,58% respectively. Simultaneously, Tuesdays and especially Thursdays show a negative impact on the COR, decreasing it by -1,07% and -2,78% respectively. Wednesdays have a small positive impact of 0,80% on the CTR, whilst Sundays have a negative impact of 1,70% on CTR.

The hour sent has a great positive impact on the COR between 16:00 and 21:00, while the negative impact is very large for emails sent between 6:00 and 7:00 (-14,84%) and less large, but negative, between 7:00 and 11:00. The impact of the hour sent is larger on the COR then it is on the CTR. After 16:00 a positive impact on the COR is noticed, whilst during the night and in the morning a negative impact on the COR is observed.

Dynamic content is used in over three quarters of all campaigns, a total of 7.121. This increases the CTR by 1,7%, but doesn't impact the COR. The personalised subject line is used in a small (11,1%) number of business services campaigns and negatively impacts the COR by -1,7%. The responsive design is adopted in 79,7% of the campaigns, but drops the average COR by -6,2%. As the technique is only effective after opening the email, these changes could also be due to other email technicalities.

Technique (% known in data)	COR	CTR
Dynamic content (93%)	n/a*	+ 1,7%
Personalised subject line (100%)	- 1,7%	n/a*
Responsive design (90%)	- 6,2%	- 0,3%

Notes:
1* The percentages shown in these graphs, illustrate the deviation (subtract/add) from the average ratio.
2*Only significant effects (p-value < 0,05) are shown in the graphs.

Impact day vs. average ratios

COR CTR Emails

Impact hour vs. average ratios

COR CTR Emails

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Business Services
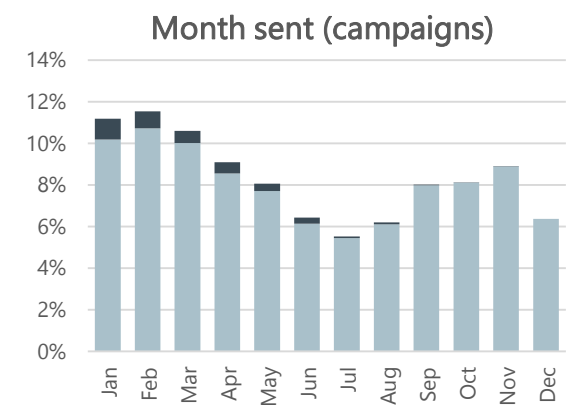
Culture

Education

Leisure
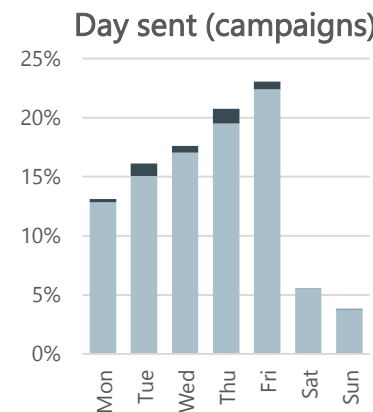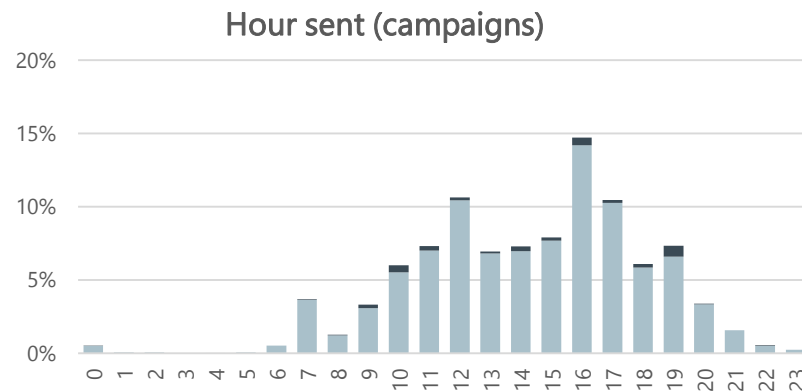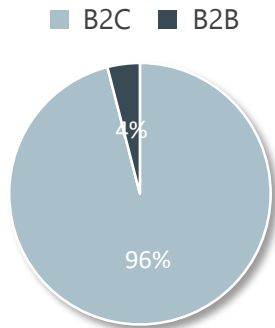
Telecom

Banking

...
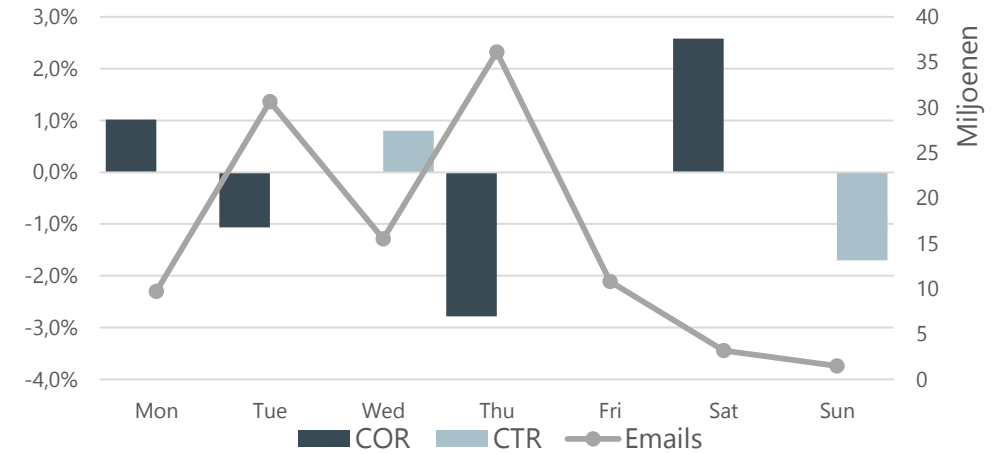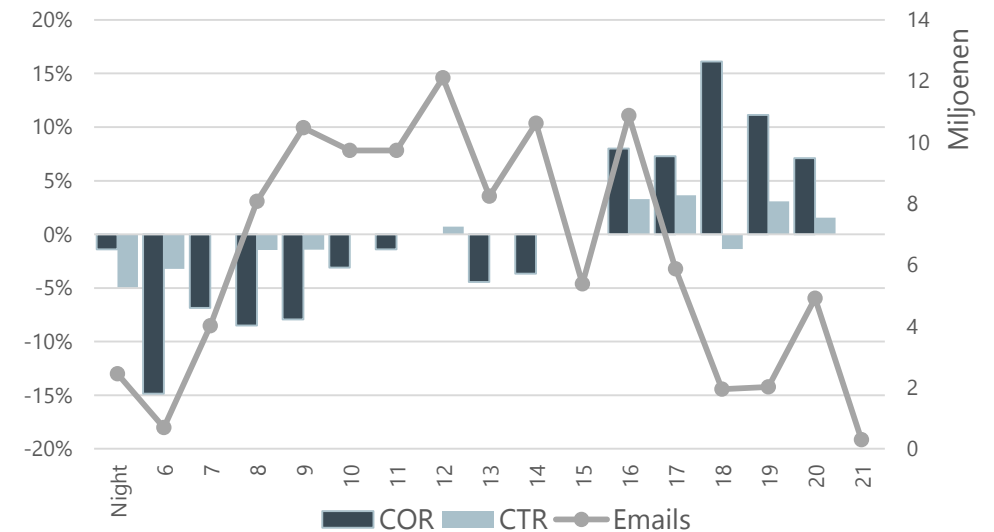
Culture and entertainment: Ratios around average, mobile usage above average

In the culture and entertainment industry 142 million emails are sent in 7.039 campaigns.

Ratios:	COR above average and CTO below average
Average campaign size*:	Below average
Campaign frequency*:	Above average
Timing:	Most campaigns sent in the work week during office hours peaking between 16:00 and 17:00
Technique adoption:	Dynamic content adoption is high for B2C and non-existent for B2B. For personalised subject line adoption is above average and low for responsive design
Mobile usage:	Above average

Adoption techniques	B2C	B2B
Dynamic content	56%	0%
Personalised subject line	8%	8%
Responsive design	60%	64%

	👁	🖱	🖱⃠
Total	**42,6%**	**6,5%**	**13,6%**
B2C	42,7%	6,5%	13,6%
B2B	38,2%	5,3%	12,4%

% Mobile device	B2C	B2B
Opens	52%	27%
Clicks	51%	34%

Legend: ■ B2C ■ B2B

Pie chart: 96% / 4%

Hour sent (campaigns)

Day sent (campaigns)
Mon, Tue, Wed, Thu, Fri, Sat, Sun

Month sent (campaigns)
Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec

* These numbers can be found in the appendix
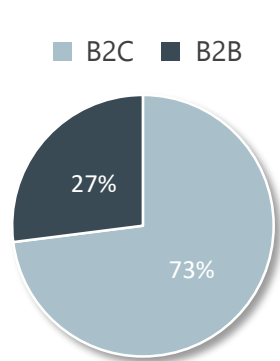
Education: Small campaigns mostly sent during office hours (90%)

i The education industry includes 47 million emails sent in 6.034 campaigns.

Ratios:	Above average
Average campaign size*:	Very small, with 8k compared to 25k on average
Campaign frequency*:	Below average
Timing:	Campaigns are mostly sent during office hours (93%), with a decrease in summer months
Technique adoption:	The adoption of responsive design is above average, use of personalised subject line is very low and use of dynamic content is average
Mobile usage:	Below average

Adoption techniques	B2C	B2B
Dynamic content	40%	41%
Personalised subject line	2%	3%
Responsive design	93%	71%

	👁	🖱	🖱⃠
Total	**42,0%**	**8,0%**	**17,9%**
B2C	43,1%	8,6%	18,3%
B2B	38,9%	6,5%	17,0%

% Mobile device	B2C	B2B
Opens	38%	29%
Clicks	28%	20%
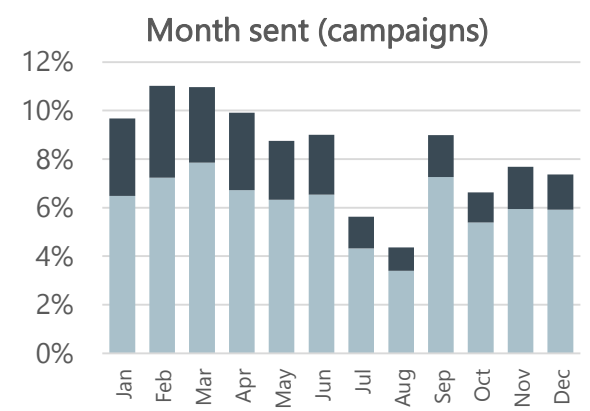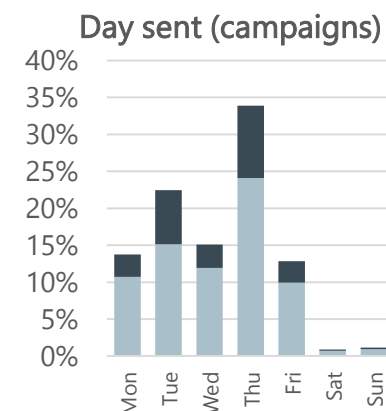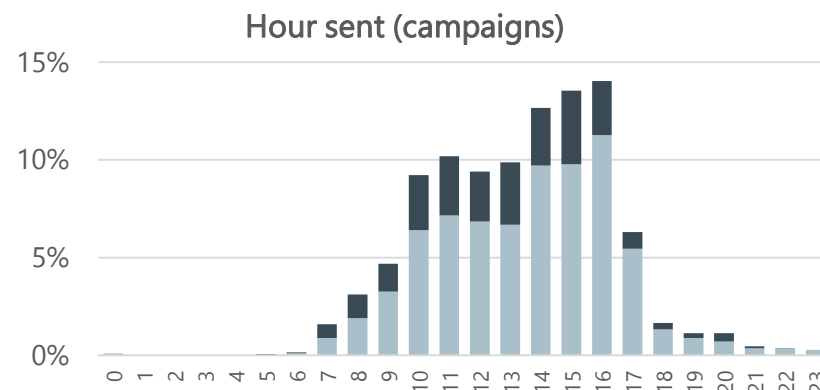
Legend: ■ B2C ■ B2B

Pie chart: 27% (B2B), 73% (B2C)

Hour sent (campaigns)
(bar chart, 0–23, y-axis 0%–15%)

Day sent (campaigns)
(bar chart: Mon, Tue, Wed, Thu, Fri, Sat, Sun; y-axis 0%–40%)

Month sent (campaigns)
(bar chart: Jan–Dec; y-axis 0%–12%)

* These numbers can be found in the appendix

# Leisure: Above average ratios, high technique adoption and above average mobile usage

ℹ️ In the leisure industry 178 million emails are sent in 5.569 campaigns.

Ratios:	Above average
Average campaign size*:	Large
Campaign frequency*:	Very high
Timing:	Focus on leisure time: before work (7:00), lunch hour (12:00), high peak between 19:00 and 20:00 and a spike again at midnight
Technique adoption:	For B2C, high for dynamic content, personalised subject line and responsive design
Mobile usage:	Above average

	👁	🖱	🖱✕
Total	**44,1%**	**9,1%**	**18,8%**
B2C	44,1%	9,2%	18,8%
B2B	43,0%	1,4%	5,5%

Adoption techniques	B2C	B2B
Dynamic content	87%	2%
Personalised subject line	11%	0%
Responsive design	84%	0%

% Mobile device	B2C	B2B
Opens	58%	27%
Clicks	49%	23%
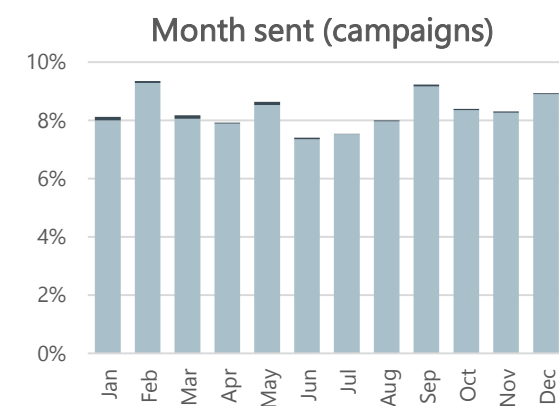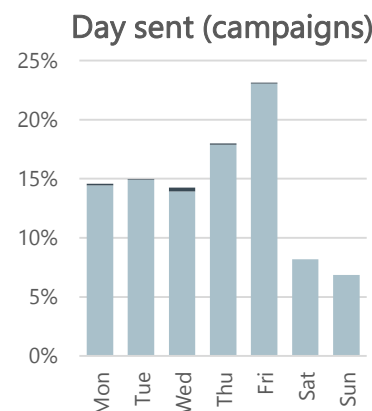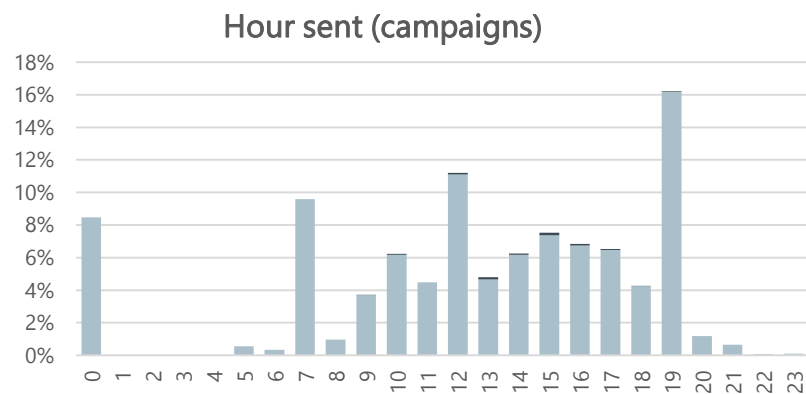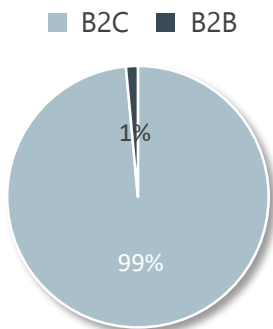
■ B2C ■ B2B

1%

99%

Hour sent (campaigns)

Day sent (campaigns)

Month sent (campaigns)

* These numbers can be found in the appendix

Industries

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

In the telecom services and equipment industry 79 million emails are sent in 5.451 campaigns.

Ratios: High, especially CTR (12,4% compared to 6,9%)
Average campaign size*:   Small with 14k compared to 25k on average
Campaign frequency*:   Very high with 248 compared to 64 campaigns on average
Timing: 85,5% of campaigns sent during office hours from 08:00 to 18:00
Technique adoption: Very high for all techniques and sectors, except in B2B for personalised subject line

Mobile usage: Above average

Adoption techniques	B2C	B2B
Dynamic content	90%	74%
Personalised subject line	15%	3%
Responsive design	98%	93%

	👁	🖱	🖱̸
Total	54,4%	12,4%	20,1%
B2C	56,4%	13,6%	21,7%
B2B	44,3%	6,4%	12,0%

% Mobile device	B2C	B2B
Opens	56%	31%
Clicks	52%	22%

■ B2C ■ B2B

Pie chart: B2B 17%, B2C 83%

Hour sent (campaigns)

Day sent (campaigns)

Month sent (campaigns)

* These numbers can be found in the appendix

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

ⓘ The banking and insurance industry includes 36 million emails sent in 3.388 campaigns.

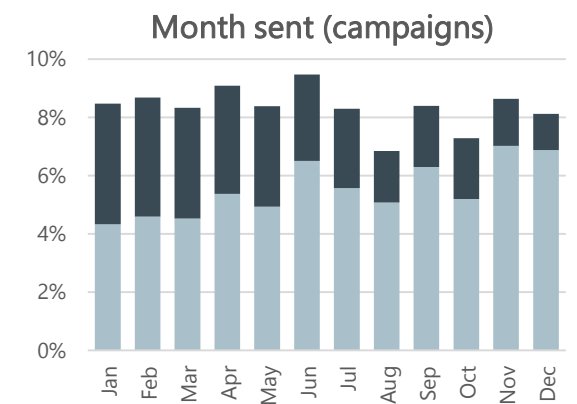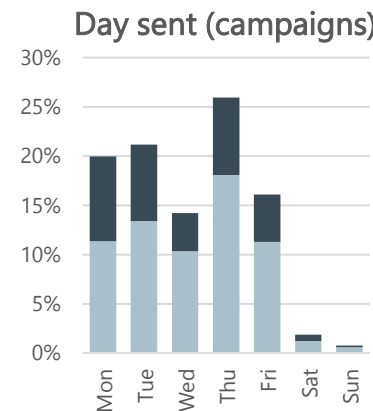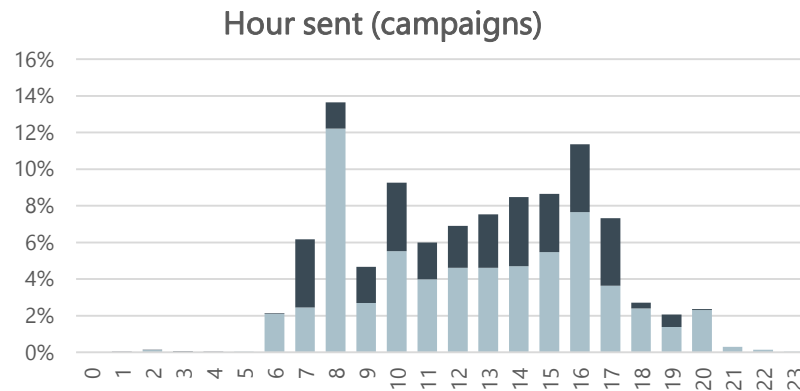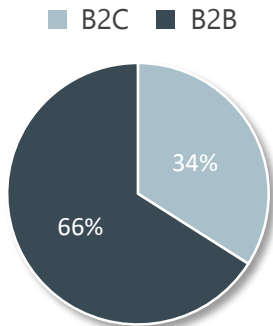|	
Ratios:	High, both COR and CTR
Average campaign size*:	Very small, with 11k compared to 25k on average
Campaign frequency*:	Below average
Timing:	Strong focus on office hours
Technique adoption:	Dynamic content is much higher in B2C, while personalised subject is much higher in B2B
Mobile usage:	Low

Adoption techniques	B2C	B2B
Dynamic content	81%	17%
Personalised subject line	5%	8%
Responsive design	98%	66%

	👁	🖱	🖱/👁
Total	**59,1%**	**11,0%**	**18,0%**
B2C	59,7%	10,6%	17,1%
B2B	58,0%	11,8%	19,7%

% Mobile device	B2C	B2B
Opens	43%	18%
Clicks	26%	14%

Pie chart (B2C / B2B): B2C 34%, B2B 66%

Hour sent (campaigns)

Day sent (campaigns)

Month sent (campaigns)

* These numbers can be found in the appendix

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Energy and natural resources: Very high ratios, very small average campaign size and high adoption of techniques
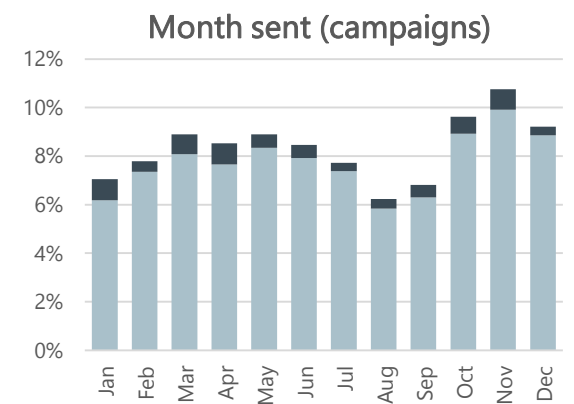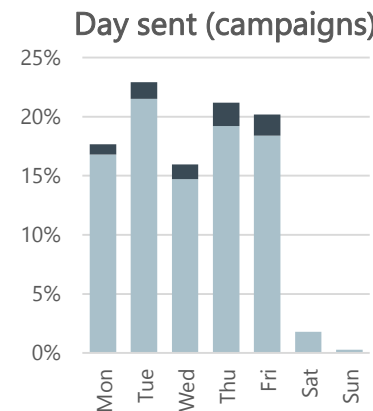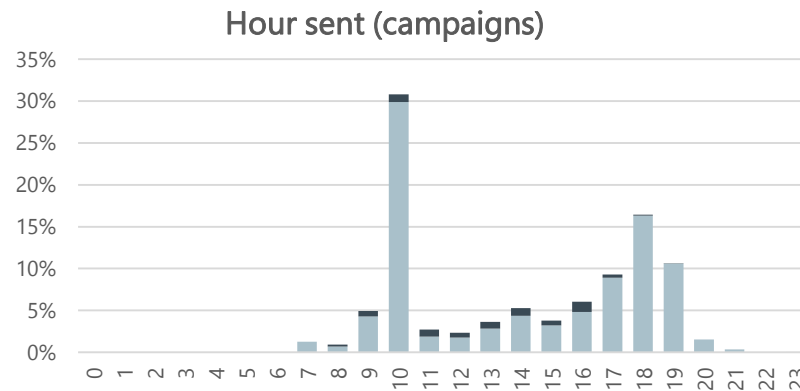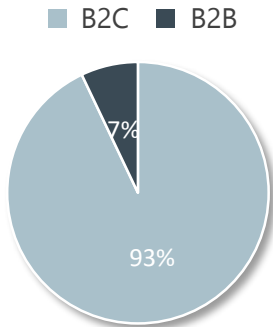
The energy and natural resources industry includes 21 million emails sent in 3.374 campaigns.

Ratios:	COR and CTR both very high
Average campaign size*:	Very small, with 6k compared to 25k on average
Campaign frequency*:	Very high
Timing:	Focus on office hours and early evenings, peak between 10:00 and 11:00
Technique adoption:	In B2C very high for dynamic content and high on personalised subject, above average on responsive design
Mobile usage:	Slightly above average on opens, slightly below average on clicks

Adoption techniques	B2C	B2B
Dynamic content	91%	6%
Personalised subject line	9%	0%
Responsive design	100%	77%

	👁	🖱	🖱✕
Total	69,6%	11,8%	16,2%
B2C	71,1%	11,9%	16,1%
B2B	51,0%	9,9%	17,6%

% Mobile device	B2C	B2B
Opens	53%	31%
Clicks	38%	12%

■ B2C ■ B2B

7%

93%

Hour sent (campaigns)

Day sent (campaigns)

Month sent (campaigns)

* These numbers can be found in the appendix

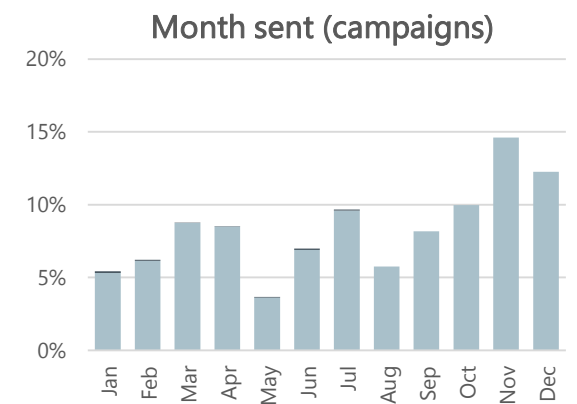# Hotel and catering: Very low ratios and a very large average campaign size, above average mobile usage

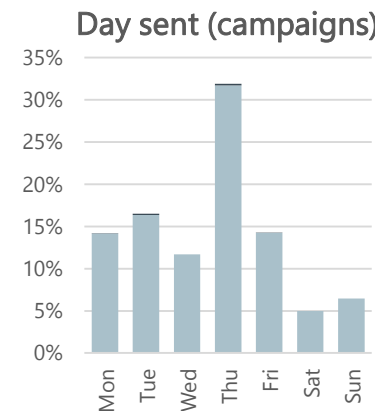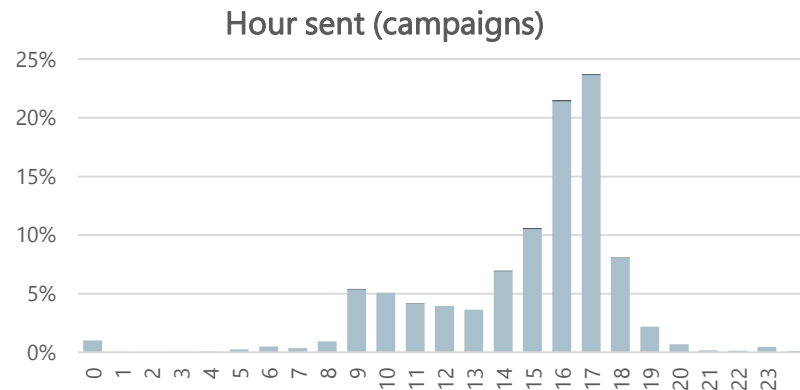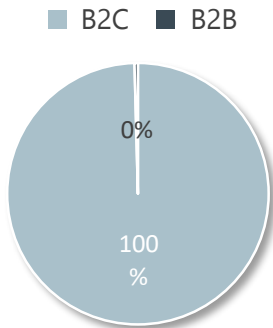**The hotel and catering industry includes 204 million emails sent in 2.872 campaigns.**

Ratios:	Very low, especially CTR (1,8% compared to 6,9%)
Average campaign size*:	Very large with 71k compared to 25k on average
Campaign frequency*:	Above average
Timing:	Strong focus on the afternoon between 14:00 and 18:00 (71%). High peak on Thursdays and declining on the weekend
Technique adoption:	B2C adoption of dynamic content is high while the adoption of the other techniques are low
Mobile usage:	High on opens, above average on clicks

Adoption techniques	B2C	B2B
Dynamic content	88%	0%
Personalised subject line	0%	0%
Responsive design	19%	100%

	Eye	Mouse	Mouse-off
Total	**24,3%**	**1,8%**	**6,5%**
B2C	24,3%	1,8%	6,5%
B2B	29,2%	2,8%	8,7%

% Mobile device	B2C	B2B
Opens	61%	29%
Clicks	54%	31%

B2C B2B

0%

100%

Hour sent (campaigns)

Day sent (campaigns)

Month sent (campaigns)

* These numbers can be found in the appendix

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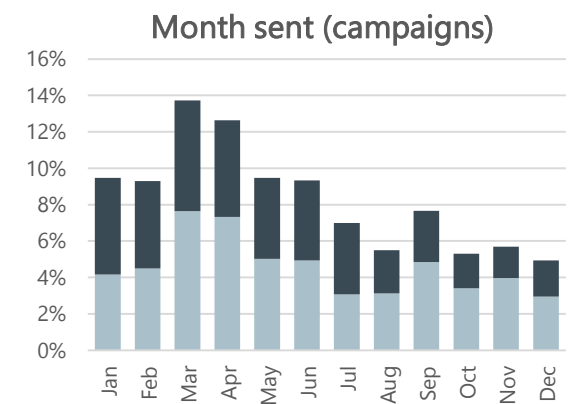# Healthcare: Ratios slightly above average and a very small average campaign size
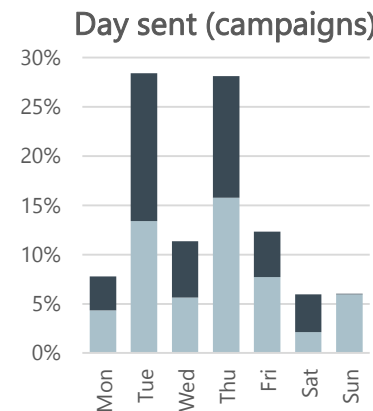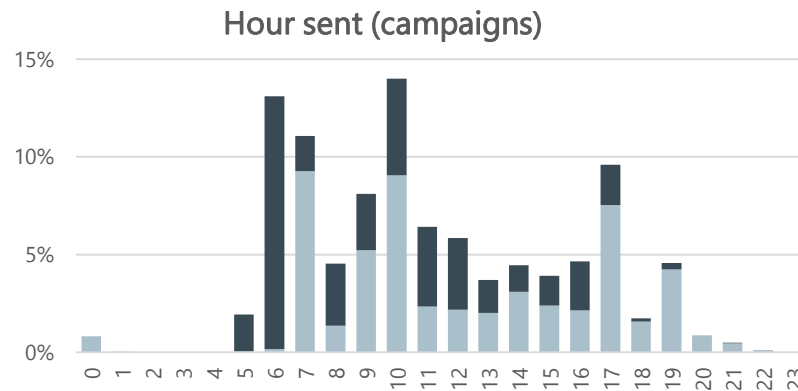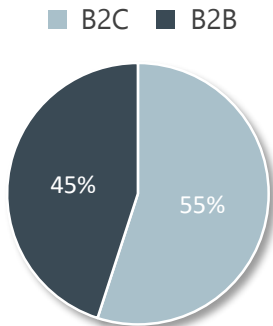
In the healthcare industry 30 million emails are sent in 2.428 campaigns.

Ratios:	Average COR, above average CTR
Average campaign size*:	Very small, with 12k compared to 25k on average
Campaign frequency*:	Low
Timing:	Tuesday and Thursday are popular days. Focus on office hours with the busiest hours from 06:00 to 08:00, 10:00 to 11:00 and from 17:00 to 18:00
Technique adoption:	Low on personalised subject and above average on responsive design. Low on dynamic content in B2C while high in B2B
Mobile usage:	Very high for B2B, average for B2C

Adoption techniques	B2C	B2B
Dynamic content	31%	50%
Personalised subject line	4%	1%
Responsive design	97%	73%

	👁	🖱	🚫
Total	**37,6%**	**7,8%**	**20,2%**
B2C	41,0%	7,0%	17,0%
B2B	33,4%	8,8%	24,2%

% Mobile device	B2C	B2B
Opens	50%	40%
Clicks	40%	35%

Legend: B2C / B2B

Pie chart: 45% / 55%

Hour sent (campaigns)

Day sent (campaigns)

Month sent (campaigns)

* These numbers can be found in the appendix

Travel: Low ratios and a very large average campaign size

In the travel industry 291 million emails are sent in 2.339 campaigns.

Ratios:	Low, especially CTR (3,0% compared to 6,9%)
Average campaign size*:	Very large, with 124k compared to 25k on average
Campaign frequency*:	Slightly below average
Timing:	Strong focus on office hours; Tuesdays and Thursdays are the most popular days for sending emails. Most campaigns are sent in spring
Technique adoption:	Very low on dynamic content and personalised subject, average on responsive design
Mobile usage:	Slightly above average

Total	26,5%	3,0%	10,8%
B2C	25,4%	2,9%	10,9%
B2B	43,1%	4,1%	9,0%
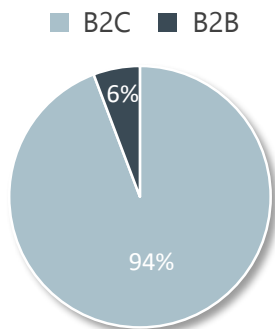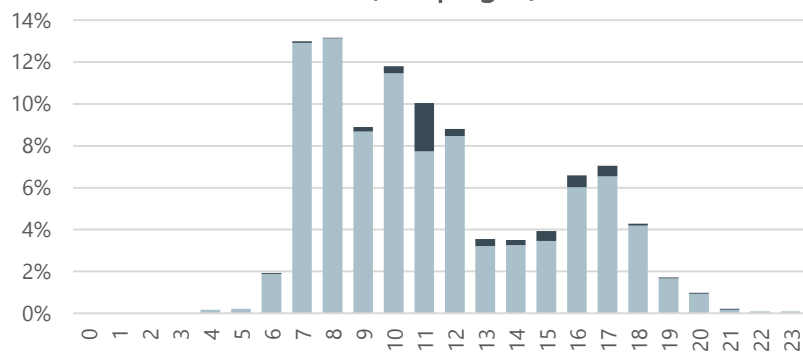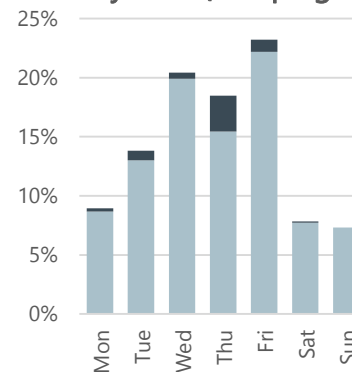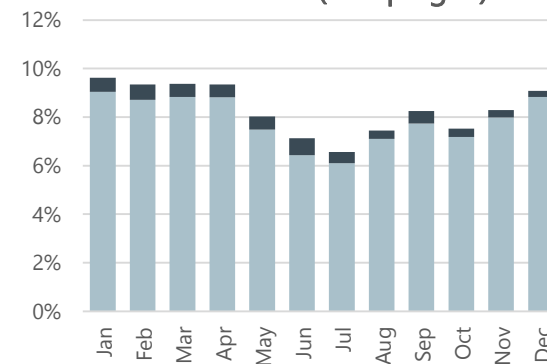
Adoption techniques	B2C	B2B
Dynamic content	6%	3%
Personalised subject line	2%	0%
Responsive design	82%	83%

% Mobile device	B2C	B2B
Opens	50%	27%
Clicks	48%	18%

B2C ■ B2B

6%
94%

Hour sent (campaigns)

Day sent (campaigns)

Month sent (campaigns)

* These numbers can be found in the appendix

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Construction services: Very high ratios and very small average campaign size, focus on working days

The construction services industry includes 25 million emails sent in 2.223 campaigns.

Ratios:	Very high, especially CTR (15,3% compared to 6,9%)
Average campaign size*:	Very small, with 11k compared to 25k on average
Campaign frequency*:	Slightly above average
Timing:	Focus on working days and office hours, except for a spike of campaigns between 03:00 and 04:00
Technique adoption:	Dynamic content very high, personalised subject very low and responsive design very low in B2C, but high in B2B
Mobile usage:	Above average (high for B2B)

	👁	🖱	🖱✕
Total	**54,4%**	**15,3%**	**25,5%**
B2C	53,2%	14,6%	26,0%
B2B	55,8%	16,3%	24,9%

Adoption techniques	B2C	B2B
Dynamic content	83%	61%
Personalised subject line	0%	0%
Responsive design	17%	85%

% Mobile device	B2C	B2B
Opens	47%	38%
Clicks	48%	33%

Legend: ■ B2C ■ B2B

Pie chart: 46% / 54%

Hour sent (campaigns)

Day sent (campaigns)

Month sent (campaigns)

* These numbers can be found in the appendix

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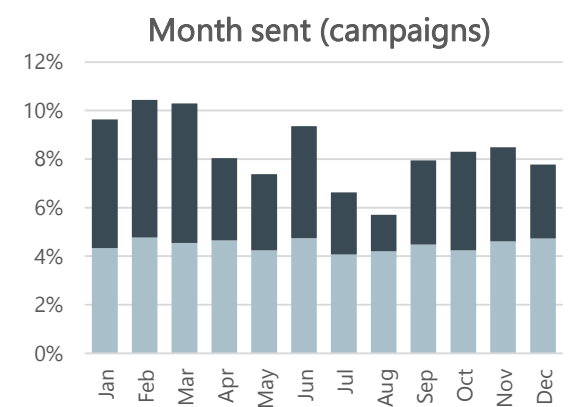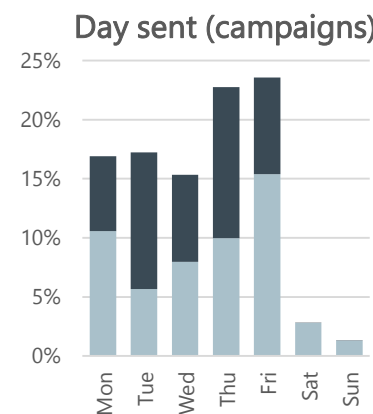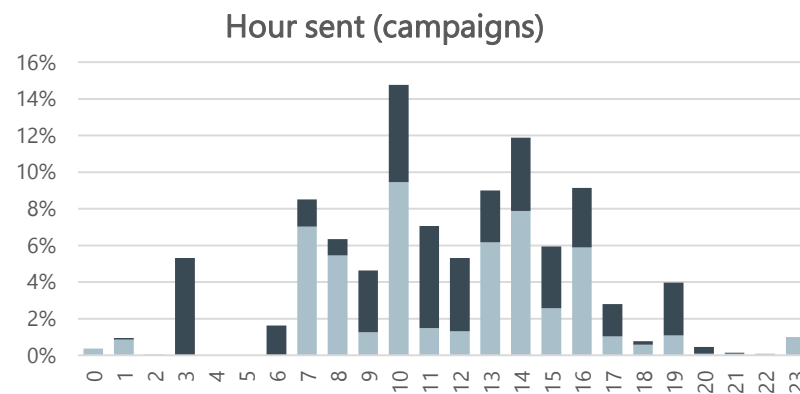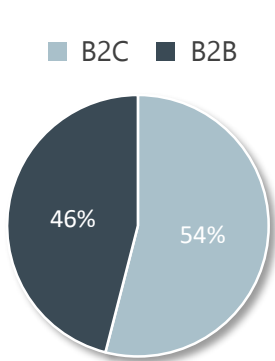
Charity: Very high CTR and very high adoption of techniques

Charity includes 124 million emails sent in 2.185 campaigns.

Ratios:	COR above average, very high CTR (15,4% compared to 6,9%)
Average campaign size*:	Very large, with 57k compared to 25k on average
Campaign frequency*:	High
Timing:	Focus on office hours, and the working week from Tuesday to Friday
Technique adoption:	Very high for all techniques (B2C).
Mobile usage:	Slightly above average on opens, slightly below average on clicks

Adoption techniques	B2C	B2B
Dynamic content	97%	0%
Personalised subject line	39%	0%
Responsive design	99%	83%

	👁	🖱	🖱⊘
Total	**45,1%**	**15,4%**	**23,7%**
B2C	45,1%	15,4%	23,7%
B2B	44,9%	13,8%	30,2%

% Mobile device	B2C	B2B
Opens	52%	20%
Clicks	41%	38%

Legend: ■ B2C ■ B2B

Pie chart: 0% / 100%

Hour sent (campaigns)

Day sent (campaigns)

Month sent (campaigns)

* These numbers can be found in the appendix

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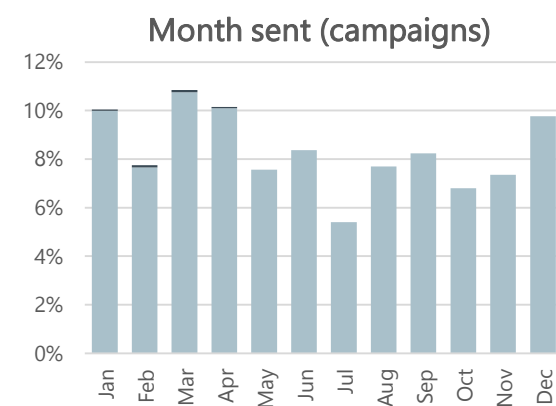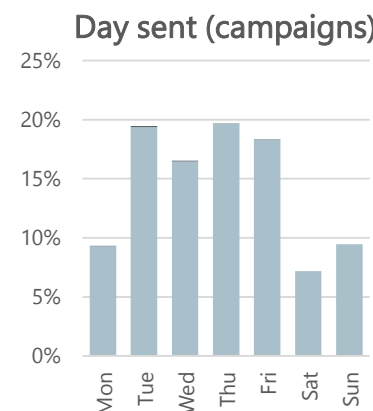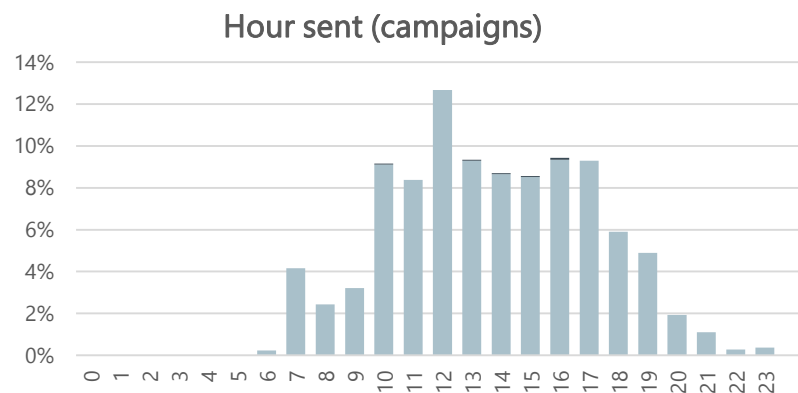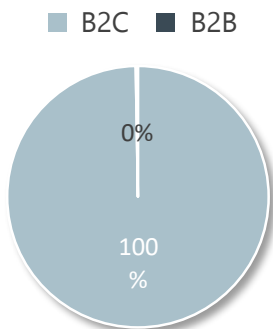
Government: High ratios with a very small average campaign size, low mobile usage

ℹ The government industry includes 15 million emails sent in 2.023 campaigns.

Ratios:	High, especially on CTR (10,6% compared to 6,9%)
Average campaign size*:	Very small with 8k compared to 25k on average
Campaign frequency*:	Slightly below average
Timing:	Strong focus on office hours with most campaigns sent on Thursdays
Technique adoption:	High adoption ratios for B2C except for personalised subject line. B2B has low adoption for dynamic content and personalised subject line
Mobile usage:	Average for B2B, low for B2C

Adoption techniques	B2C	B2B
Dynamic content	51%	7%
Personalised subject line	0%	0%
Responsive design	80%	80%

	👁	🖱	🖱⊘
Total	**49,2%**	**10,6%**	**19,9%**
B2C	58,2%	14,3%	24,1%
B2B	39,2%	6,6%	15,2%

% Mobile device	B2C	B2B
Opens	31%	28%
Clicks	21%	19%

■ B2C ■ B2B

47% 53%

Hour sent (campaigns)

Day sent (campaigns)

Month sent (campaigns)

* These numbers can be found in the appendix

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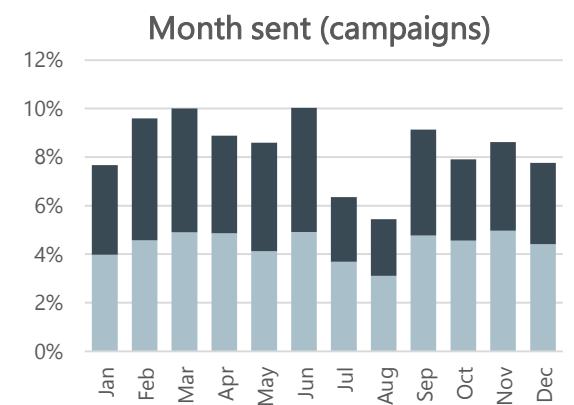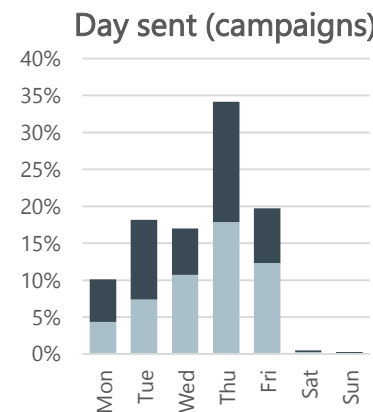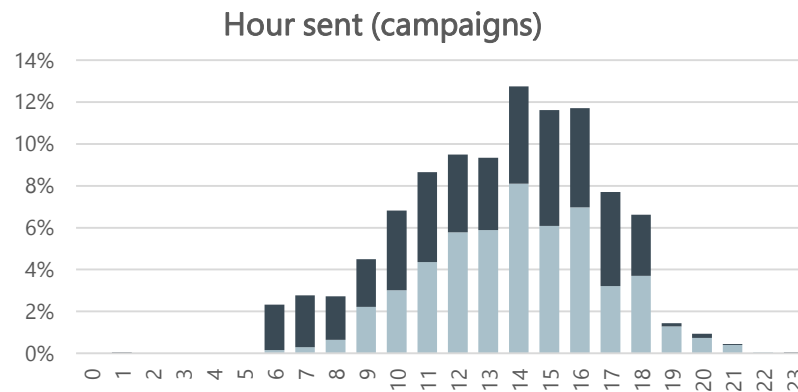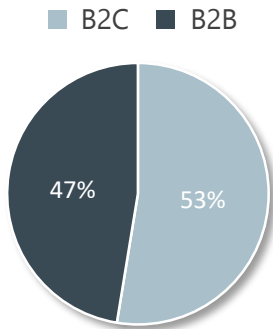
Automotive: High ratios, very large average campaign size and high adoption of techniques, especially personalised subject line

i The automotive industry includes 89 million emails sent in 1.856 campaigns.

Ratios:	High, especially for CTR (10,4% compared to 6,9%)
Average campaign size*:	Very large with 48k compared to 25k on average
Campaign frequency*:	Slightly below average
Timing:	Focus on office hours with high peak at 11:00, 16:00 and 17:00
Technique adoption:	Very high for B2C and B2B for all techniques, especially personalised subject line with 12% B2C and 24% B2B (compared to 7% and 5% respectively)
Mobile usage:	Average

Adoption techniques	B2C	B2B
Dynamic content	88%	49%
Personalised subject line	12%	24%
Responsive design	94%	66%

	👁	🖱	🖱̸
Total	**48,7%**	**10,4%**	**20,4%**
B2C	49,8%	11,0%	21,2%
B2B	43,4%	7,6%	17,0%

% Mobile device	B2C	B2B
Opens	51%	34%
Clicks	42%	28%

■ B2C ■ B2B

17%

83%

Hour sent (campaigns)

Day sent (campaigns)

Month sent (campaigns)

* These numbers can be found in the appendix

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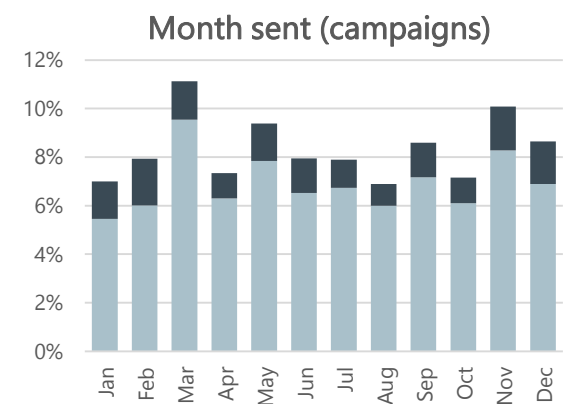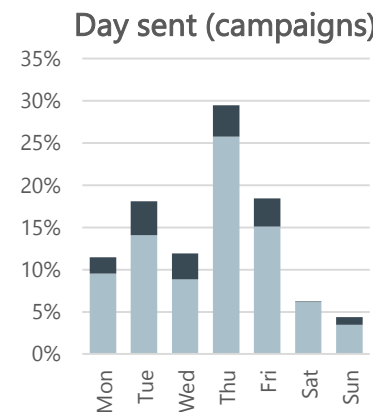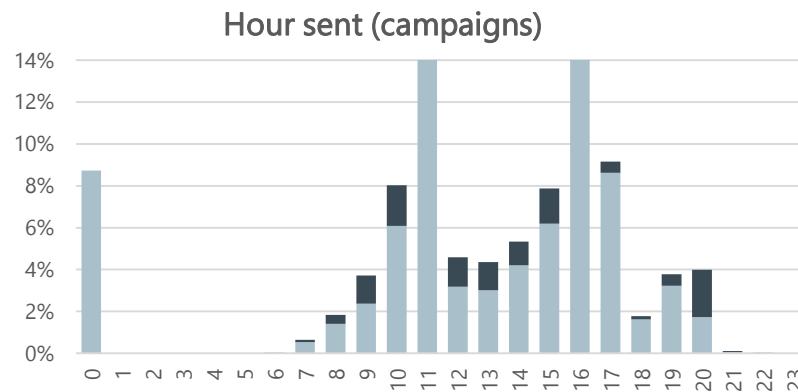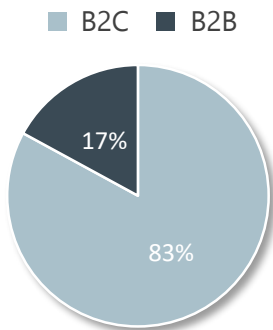
Not-for-Profit: High COR and high adoption of dynamic content and responsive design, focus on office hours

ⓘ In the not-for-profit industry 23 million emails are sent in 1.827 campaigns.

Ratios:	High COR, while CTR is slightly below average
Average campaign size*:	Small
Campaign frequency*:	Below average
Timing:	Focus on working days with a peak on Thursdays
Technique adoption:	Very high on dynamic content, very low on personalised subject and slightly above average on responsive design
Mobile usage:	Slightly below average on opens, low on clicks

Adoption techniques	B2C	B2B
Dynamic content	64%	60%
Personalised subject line	2%	0%
Responsive design	90%	79%

	👁	🖱	🚫
Total	**49,7%**	**6,4%**	**12,2%**
B2C	50,6%	6,4%	11,8%
B2B	35,0%	6,9%	17,8%

% Mobile device	B2C	B2B
Opens	44%	23%
Clicks	31%	22%

■ B2C ■ B2B

Pie chart: 94% B2C, 6% B2B

Hour sent (campaigns)

Day sent (campaigns)

Month sent (campaigns)

* These numbers can be found in the appendix

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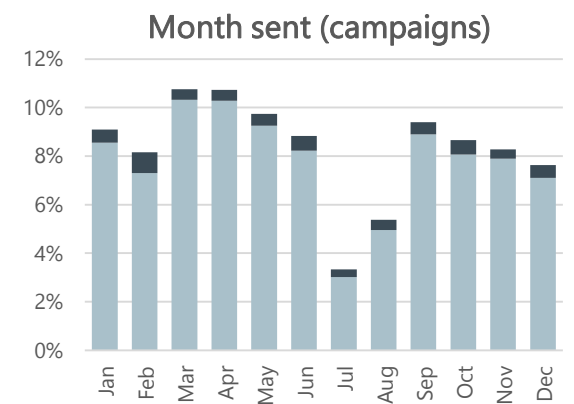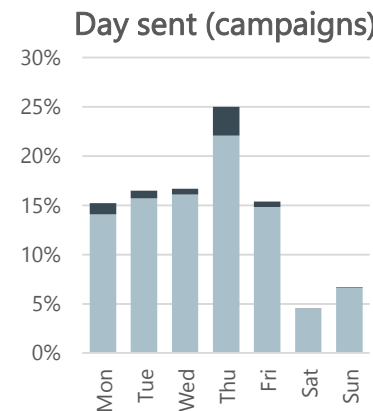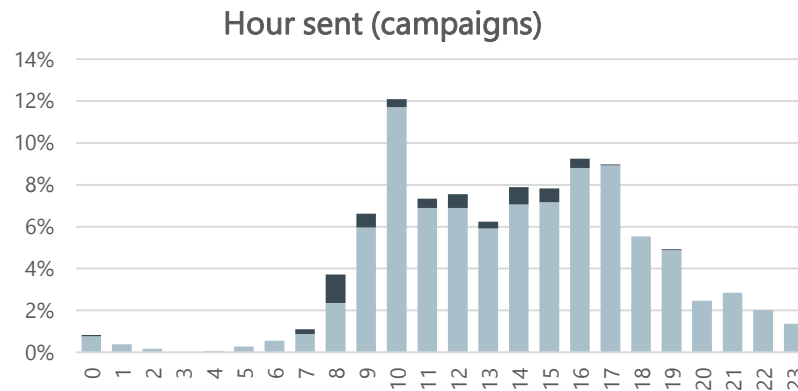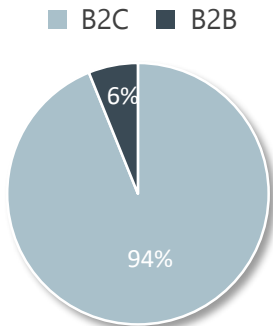
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Industry and producers: Slightly below average ratios in spite of very small campaign size, high adoption of techniques

ⓘ The industry and producers industry includes 9 million emails sent in 1.788 campaigns.

Ratios:	Slightly below average
Average campaign size*:	Very small with 5k compared to 25k on average
Campaign frequency*:	Very low with 29 campaigns compared to 64 on average
Timing:	Strong focus on office hours and working days
Technique adoption:	In B2B high on dynamic content and personalised subject, while below average on responsive design
Mobile usage:	Below average

Adoption techniques	B2C	B2B
Dynamic content	31%	53%
Personalised subject line	7%	16%
Responsive design	84%	58%

	👁	🖱	🖱/👁
Total	**35,2%**	**5,9%**	**16,1%**
B2C	33,9%	5,6%	16,3%
B2B	35,4%	6,0%	16,1%
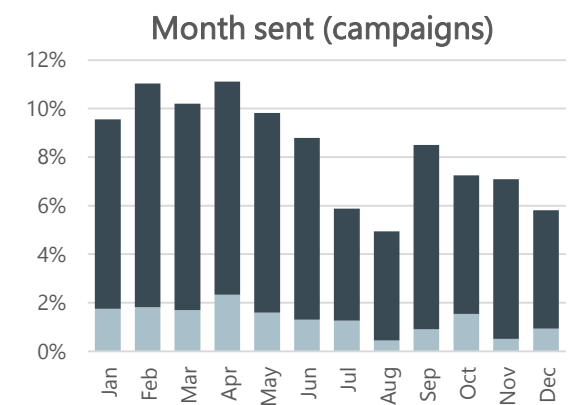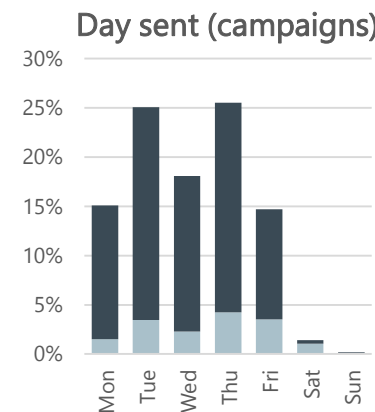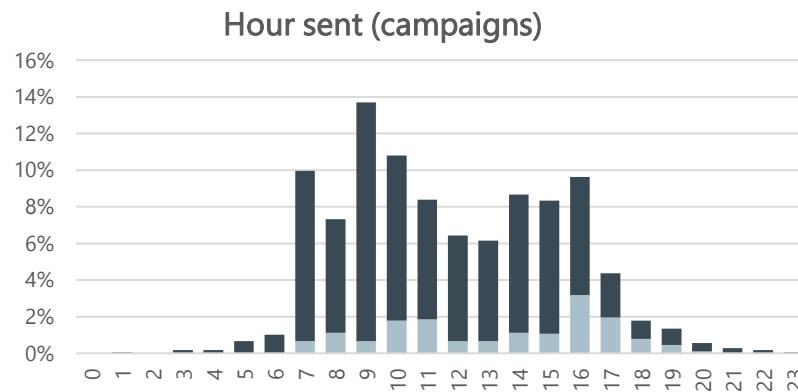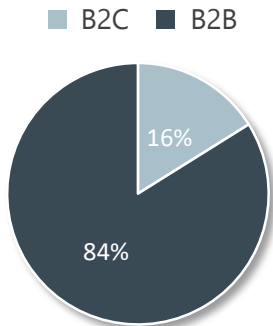
% Mobile device	B2C	B2B
Opens	30%	21%
Clicks	26%	18%

■ B2C ■ B2B

Pie chart: B2C 16%, B2B 84%

Hour sent (campaigns)

Day sent (campaigns)

Month sent (campaigns)

* These numbers can be found in the appendix

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Agriculture: Strong focus on office hours, with peak between 16:00 and 17:00, high CTR and CTO

The agriculture industry includes 5 million emails sent in 1.129 campaigns.

Ratios:	Average on COR, high on CTR and CTO
Average campaign size*:	Very small with 5k compared to 25k on average
Campaign frequency*:	Very high with 125 compared to 64 on average
Timing:	Strong focus on working days and office hours, especially between 15:00 and 17:00
Technique adoption:	Very low for personalised subject line, high for responsive design and average for dynamic content
Mobile usage:	Slightly below average on clicks, high on opens

	👁	🖱	🖱⃠
Total	**39,1%**	**9,1%**	**20,9%**
B2C	34,9%	4,2%	11,4%
B2B	39,3%	9,3%	21,2%

Adoption techniques	B2C	B2B
Dynamic content	49%	23%
Personalised subject line	0%	0%
Responsive design	98%	100%

% Mobile device	B2C	B2B
Opens	35%	38%
Clicks	42%	21%
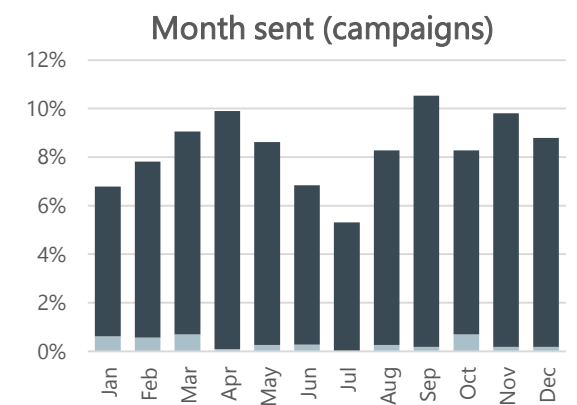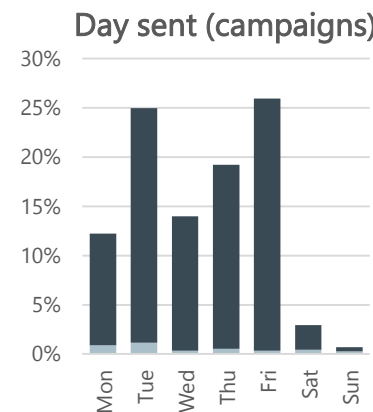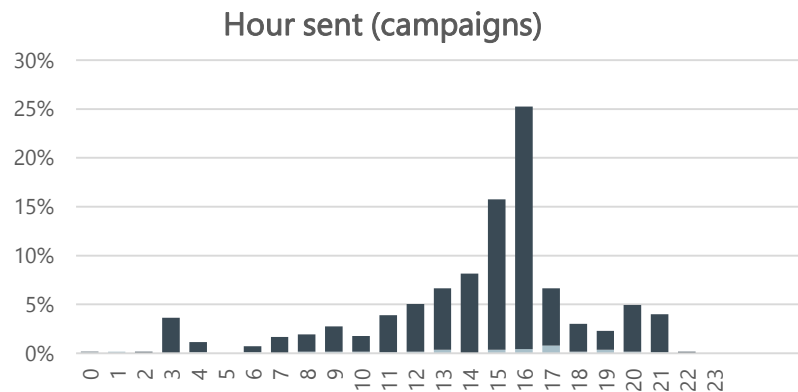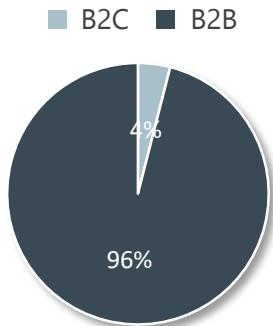
■ B2C ■ B2B

Pie chart: B2C 4%, B2B 96%

Hour sent (campaigns)

Day sent (campaigns)

Month sent (campaigns)

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ICT and internet: Below average ratios and small campaign size, strong focus on office hours

The ICT and internet industry includes 18 million emails sent in 1.078 campaigns.

Ratios: Below average on COR and low on CTR

Average campaign size*: Small with 16k compared to 25k on average

Campaign frequency*: Very low

Timing: Strong focus on office hours and spike on Thursdays

Technique adoption: The adoption of dynamic content is low but the other techniques are utilized more than on average

Mobile usage: Slightly below average

	👁	🖱	🖱̸
Total	**33,2%**	**4,8%**	**12,3%**
B2C	22,7%	2,2%	7,2%
B2B	36,8%	5,7%	14,0%

Adoption techniques	B2C	B2B
Dynamic content	13%	27%
Personalised subject line	9%	7%
Responsive design	81%	77%

% Mobile device	B2C	B2B
Opens	45%	24%
Clicks	40%	20%
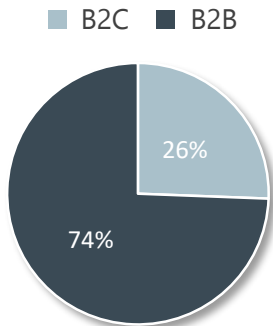
Legend: ■ B2C ■ B2B

Pie chart: 26% (B2C), 74% (B2B)

Hour sent (campaigns)
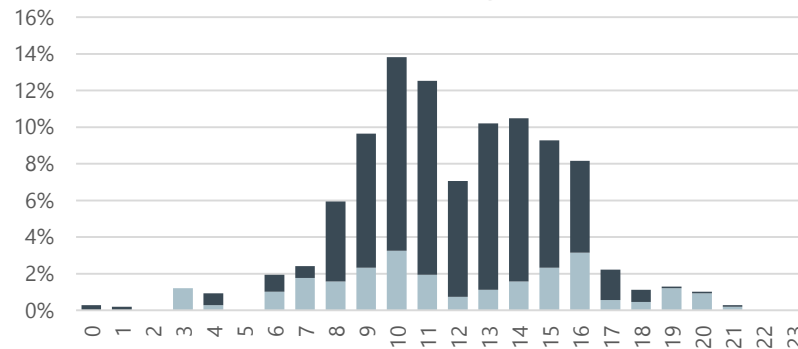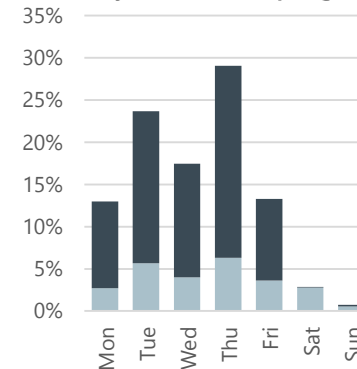
Day sent (campaigns)

Month sent (campaigns)
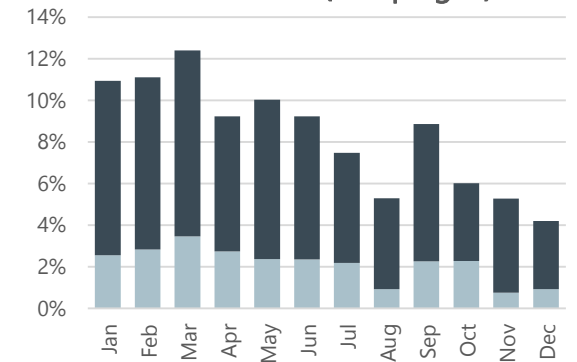
* These numbers can be found in the appendix

Wholesale: Ratios are slightly below average while the average campaign size is very small, high adoption of techniques in B2B

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ⓘ The wholesale industry includes 7 million emails sent in 739 campaigns.

Ratios:	Slightly below average on COR, low on CTR
Average campaign size*:	Very small with 10k compared to 25k on average
Campaign frequency*:	Below average
Timing:	High peak between 10:00 and 11:00, 12:00 and 13:00, as well as 19:00 and 21:00. Focus on the working week with a spike on Wednesday
Technique adoption:	The adoption of dynamic content and personalised subject line is very low (0%) in B2C campaigns. Adoption of all techniques is very high for B2B
Mobile usage:	High

	👁	🖱	🖱̸
Total	**35,2%**	**4,4%**	**11,4%**
B2C	41,6%	6,6%	15,4%
B2B	33,2%	3,7%	10,2%
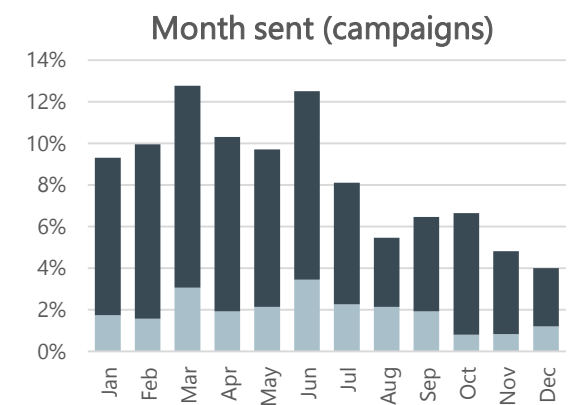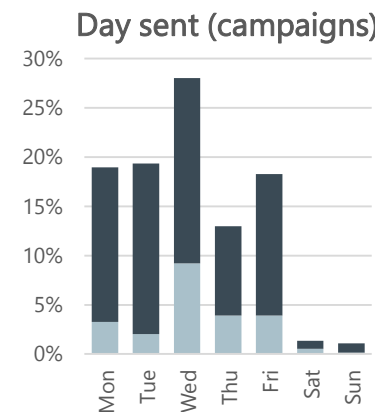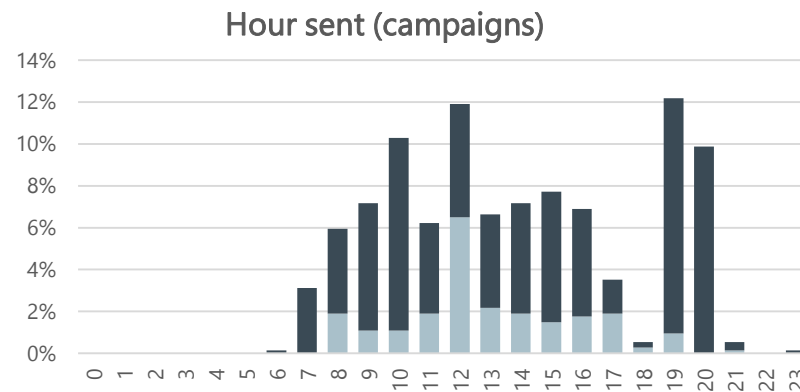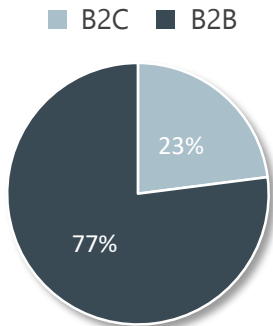
Adoption techniques	B2C	B2B
Dynamic content	0%	59%
Personalised subject line	0%	11%
Responsive design	62%	88%

% Mobile device	B2C	B2B
Opens	41%	39%
Clicks	40%	30%

■ B2C ■ B2B

23%

77%

Hour sent (campaigns)

0 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23

Day sent (campaigns)

Mon Tue Wed Thu Fri Sat Sun

Month sent (campaigns)

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

* These numbers can be found in the appendix

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Transportation and Logistics: Slightly above average ratios and high adoption of techniques (except personalised subject line)

In the transportation and logistics industry 5 million emails are sent in 705 campaigns.

Ratios:	Slightly above average on COR, above average on CTR
Average campaign size*:	Very small with 7k compared to 25k on average
Campaign frequency*:	Very low with 28 campaigns compared to 64 on average
Timing:	Strong focus on the working week and office hours with spikes between 09:00 and 11:00 as well as between 15:00 and 17:00
Technique adoption:	Low adoption of personalised subject line. High adoption of dynamic content in B2C and high adoption of responsive design
Mobile usage:	Below average

Adoption techniques	B2C	B2B
Dynamic content	68%	21%
Personalised subject line	2%	3%
Responsive design	99%	87%

	👁	🖱	🖱👁
Total	**39,4%**	**8,2%**	**19,4%**
B2C	39,1%	7,9%	19,6%
B2B	39,6%	8,6%	19,2%
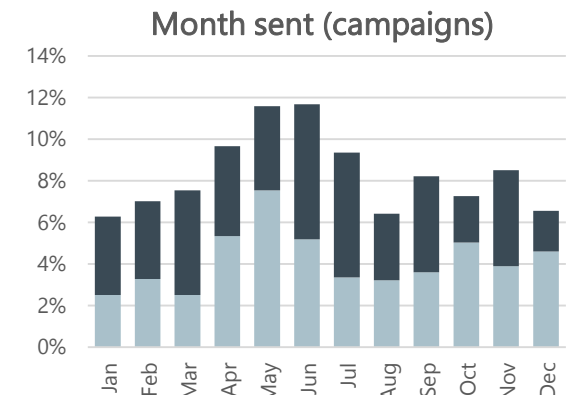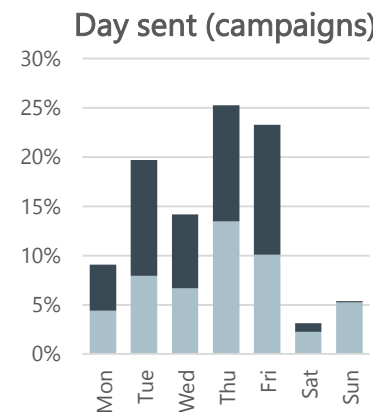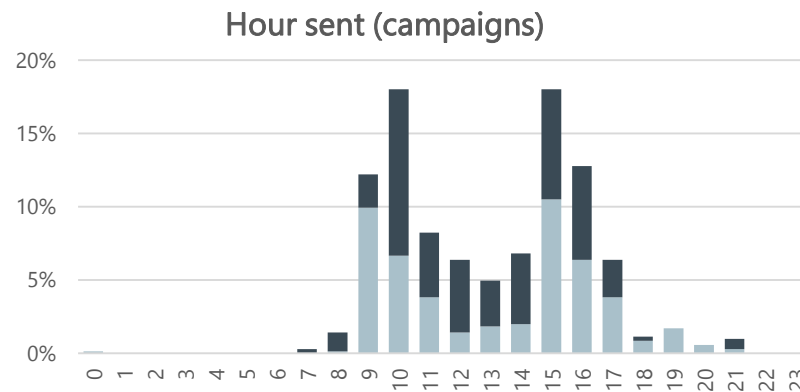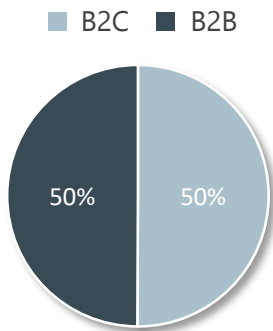
% Mobile device	B2C	B2B
Opens	41%	24%
Clicks	35%	17%

■ B2C ■ B2B

50% / 50%

Hour sent (campaigns)

Day sent (campaigns)

Month sent (campaigns)

* These numbers can be found in the appendix

Fast Moving Consumer Goods: Ratios above average with a small average campaign size, focus on office hours and late afternoon

In the fast moving consumer goods industry 4 million emails are sent in 416 campaigns.

Ratios: Above average

Average campaign size*: Very small with 10k compared to 25k on average

Campaign frequency*: Low

Timing: Strong focus on office hours, especially the afternoon from 15:00 until 19:00

Technique adoption: For B2C, high adoption of dynamic content and average adoption of other techniques

Mobile usage: Average

Adoption techniques	B2C	B2B
Dynamic content	62%	0%
Personalised subject line	5%	0%
Responsive design	85%	57%

	👁	🖱	🖱/
Total	42,3%	8,0%	17,3%
B2C	42,2%	7,9%	17,2%
B2B	43,8%	10,2%	23,7%

% Mobile device	B2C	B2B
Opens	45%	22%
Clicks	41%	25%

■ B2C ■ B2B

Pie chart: B2C 98%, B2B 2%

Hour sent (campaigns)

Day sent (campaigns)

Month sent (campaigns)

* These numbers can be found in the appendix

Sidebar navigation: Industries — General Information, ..., Agriculture, ICT, Wholesale, Logistics, FMCG, Overall

Right sidebar: Overall ratios, Size and Frequency, Timing, Techniques, Mobile, Trends, Industries, Reading guide, Appendix

Industries
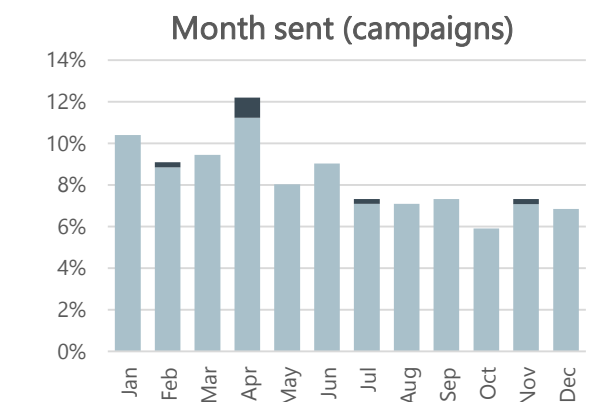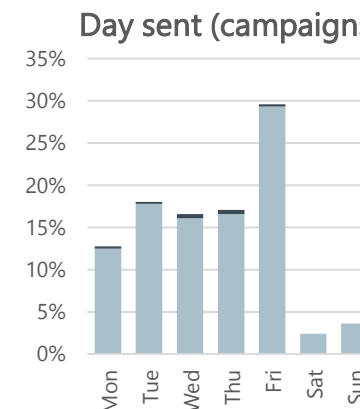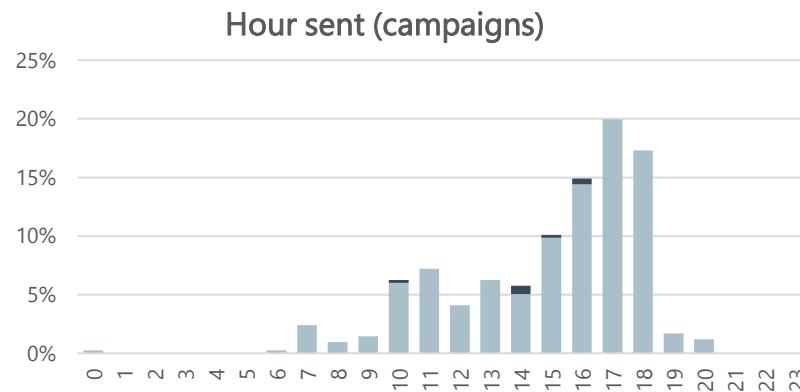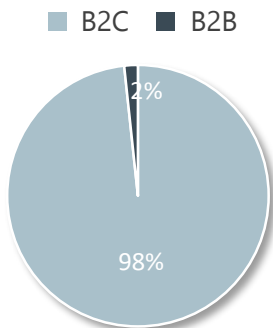
Overall (1/2): Factsheet

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

General Information

...

Agriculture

ICT

Wholesale

Logistics

FMCG

Overall

Adoption techniques	B2C	B2B
Dynamic content	42%	25%
Personalised subject line	7%	5%
Responsive design	82%	68%

	👁	🖱	🖱∅
Total	**37,5%**	**6,9%**	**16,4%**
B2C	37,1%	6,7%	15,7%
B2B	38,6%	7,5%	18,2%

% Mobile device	B2C	B2B
Opens	47%	25%
Clicks	43%	22%

■ B2C ■ B2B

29%
71%

* These numbers can be found in the appendix

Hour sent (campaigns)
(bar chart, x-axis 0–23, y-axis 0%–12%)

Day sent (campaigns)
(bar chart, Mon–Sun, y-axis 0%–25%)

Month sent (campaigns)
(bar chart, Jan–Dec, y-axis 0%–12%)
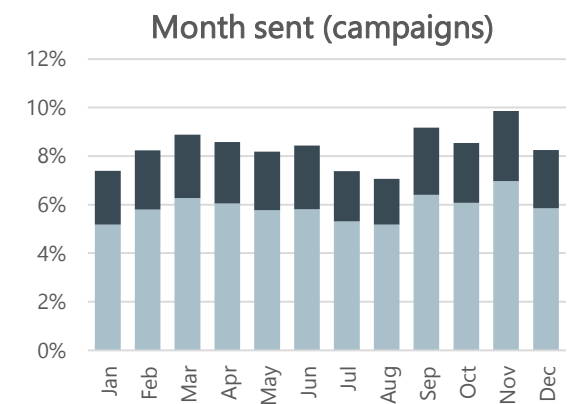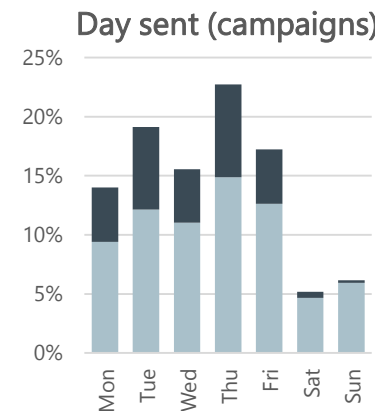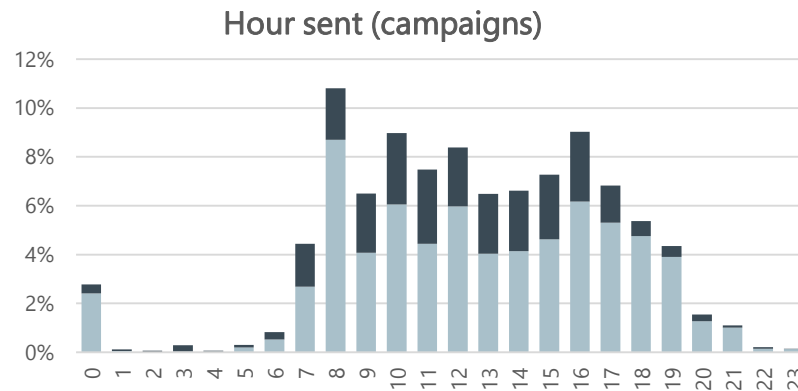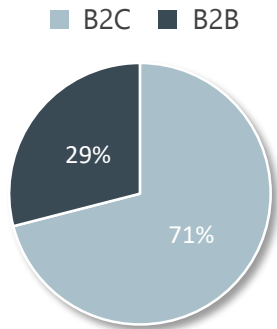
Overall (2/2): Factsheet

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

Impact day vs. average ratios

COR   CTR   Emails

Impact hour vs. average ratios

COR   CTR   Emails

Technique (% known in data)	COR	CTR
Dynamic content (84%)	+ 1,9%	+ 0,9%
Personalised subject line (100%)	+ 0,4%	n/a*
Responsive design (94%)	- 2,3 %	+ 0,2%

Epilogue

Contact details
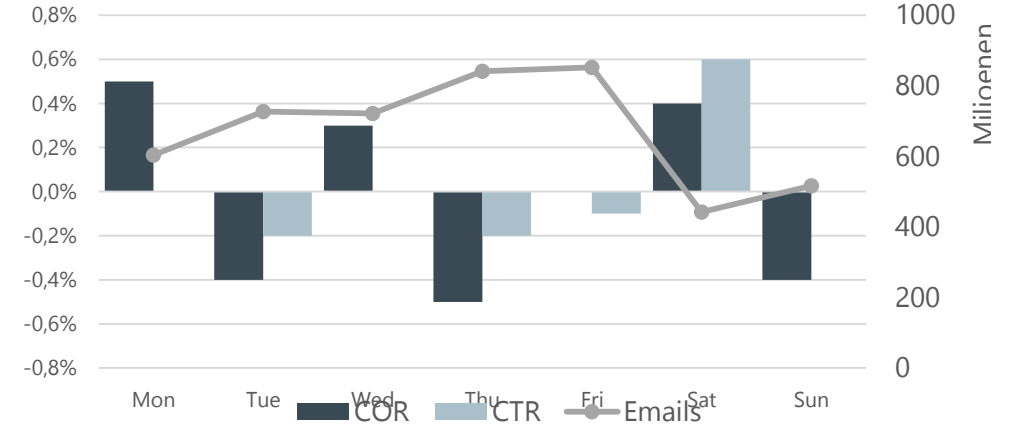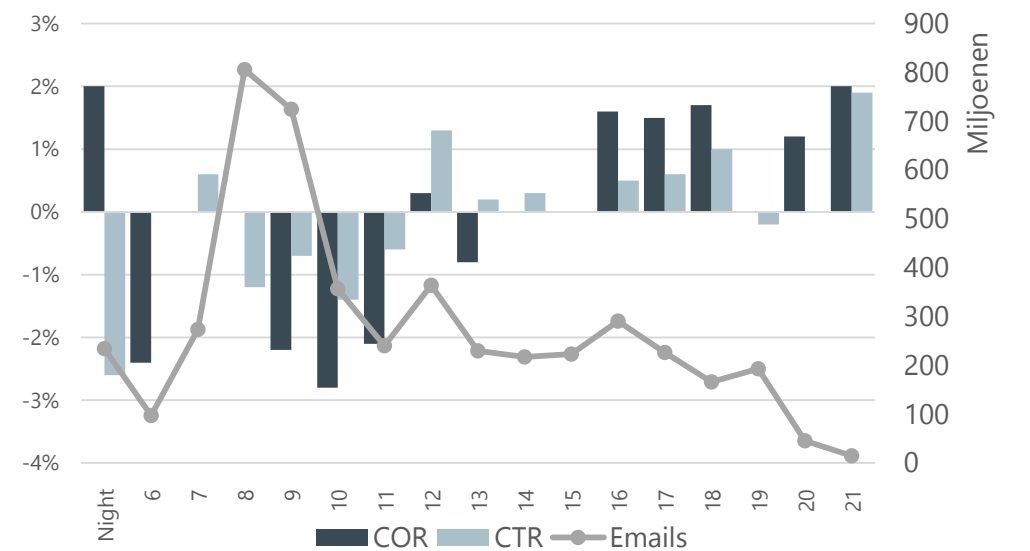
DDMA

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

DDMA
WG Plein 185
1054 SC Amsterdam

E: info@ddma.nl
T: 0031(0)204528413

The Data Driven Marketing Association (DDMA) is the cross media trade organisation for the data driven marketing industry in the Netherlands. This is one of the fast growing sectors of industry in Western Europe.
DDMA represents the interests of users, service providers and media/carriers both in the Netherlands and at a European level. The organisation also acts as a communication and knowledge platform for professionals working in data driven marketing.

ADDITIONAL INFORMATION

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

Ratios

Confirmed Open Rate (COR)

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

Click Through Rate (CTR)

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

Click to Open Rate (CTO)

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

Acceptance Rate (AR)

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

Soft Bounce Rate (SBR)

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

Hard Bounce Rate (HBR)

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

Techniques

Dynamic content

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

Personalisation subject line

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

Responsive design

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

Size and frequency

Campaign size
This is the number of emails sent per campaign.

Average campaign size
This is calculated by dividing the total number of emails sent by the total number of campaigns.

Campaign frequency
This is the number of campaigns sent per company. This is the only metric that is reported on a company level and not on a campaign level.

Average campaign frequency
This is calculated by dividing the total number of campaigns sent by the number of companies

Mobile usage

% Mobile opens
This is calculated by dividing the total number of opens on mobile + total number of opens on tablet by the total number of opens.

% Mobile clicks
This is calculated by dividing the total number of clicks on mobile + total number of clicks on tablet by the total number of clicks.

Overall ratios

Size and Frequency

Timing

Techniques

Mobile

Trends

Industries

Reading guide

Appendix

Terminology

Night vs. day
The regression analysis that specifies the impact of each hour in the day on which emails are sent, does not include all "nightly" hours. The night hours from 22:00 till 06:00 were grouped and fall under the term *night*. The reason for this grouping is that the low email activity in these hours does not produce significant results. The only real activity in this timeslot is often related to batch sending around midnight.

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

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

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

Very Low — Low — Below average — Slightly below average — Average — Slightly above average — Above average — High — Very High

Overall ratios

Size and Frequency

Timing

Techniques

Mobile

Trends

Industries

Reading guide

Appendix

Reading guide
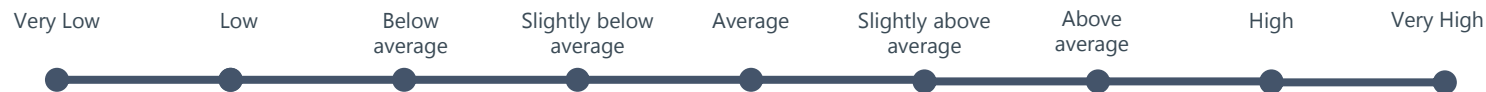
Rationale of choices

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

Campaign level vs. email level

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

As in previous years, this report focusses on option 2 due to the following reasons:

1. We aim to provide insight into the performance and effectiveness of campaigns to be used as a benchmark for campaign performance. For this purpose we argue that option 2 will give the best insights considering the campaign is the measuring unit.
2. The first option has the negative side effect of not taking the size of the campaign into account. This could result in larger campaigns, possibly containing a large amount of emails, to dominate in the calculation of the ratios. E.g. in the benchmark the largest campaign would have more influence on the overall ratio's than the 30.000 smaller campaigns.

Scope of research data

- Campaigns which contain at least 500 email addresses.
- Transactional emails, service emails and event driven emails are excluded.
- Dutch emails (Dutch senders and Dutch customers).
- Emails sent from January 2016 until December 2016.
- Data from 7 ESPs (not all ESP clients made their data available for the Benchmark and emails abroad are not included in the dataset).

Timing

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

Overall ratios

Size and Frequency

Timing

Techniques

Mobile

Trends

Industries

Reading guide

Appendix

Reading guide

Regression data

Descriptive vs. predictive

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

Regression analysis

A regression analysis is a statistical procedure that allows us to analyse relationships between variables. It provides insight into individual variables by analysing their behaviour whilst keeping other variables constant. In technical terms, a regression analysis makes use of a *dependent* variable and one or more *independent* variables. For example, suppose we want to investigate whether or not the COR is influenced by the campaign size. A regression model can be used with the COR as the *dependent* variable and the campaign size as the *independent* variable. To neutralise the effect of other variables we keep them constant, enabling us to specifically analyse the effect of the campaign size on the COR.

Regression vs. no regression

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

Assumptions for regression analysis

A regression analysis is usually performed on data that is characterized by a normal distribution. Considering the fact that the benchmark data is categorical, a normal distribution is assumed.

Reading guide

Examples

Example 1

Using the descriptive method, B2B campaigns have an average COR of 36,3% and B2C have an average COR of 34,8%. Based on this outcome, we conclude that B2B sends better quality campaigns than B2C. Several factors can explain this difference, for example campaign size, with the average campaign size of B2B-campaigns being 7.000 compared to 33.000 for B2C. Later we show that the data indicates that a higher campaign size has a strong negative impact on the COR. Using the predictive method, the impact of one variable on the COR, in this case B2B or B2C, is controlled for other variables, such as campaign size. The predictive method predicts a COR of 33,3% for B2B and 36% for B2C indicating that a campaign with similar properties performs better in the B2C market compared to the B2B market. This is contrary to what we concluded using the descriptive method, because we corrected for campaign size and all other campaign characteristics.

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

Example 2

Using the descriptive method, the *energy and natural resources* industry has a COR of 59% and the *retail (eCommerce only)* industry has a COR of 19%. Thus we conclude that the *energy and natural resources* industry performs better compared to the *retail (eCommerce only)* industry. Using the predictive method we can analyse whether individual factors could explain this difference. Similar to the previous example, we found that the campaign size is influential. On average, the *retail (eCommerce only)* industry sends approximately 83.000 emails compared to approximately 7.000 emails which are sent in the *energy and natural resources* industry. Using the predictive method, the difference between industries becomes significantly smaller with the *energy and natural resources* industry averaging at a COR of 57% and *retail (eCommerce only)* at a COR of 32%.

How to navigate the industry pages

Reading guide

In the following section a detailed overview will be provided for each of the industries. Each industry has either one or two pages describing the results. The first page, description, is based on output of the descriptive method (Figure 1) whereas the second page, impact, is based on output of the predictive method (Figure 2). The second page is not available for each industry, due to the fact that not all industries meet the minimum requirement for the regression analysis (7.500 campaigns). / However the second page is only available for those companies meeting the minimum requirements for the regression analysis.

Key points for each page have been included below as an example of how to read the following pages. For information on the regression analysis we refer to the reading guide.
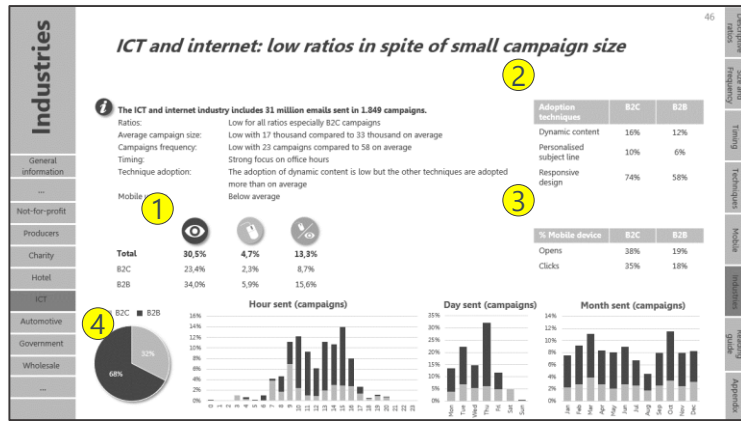
Figure 1. *This page contains General Information regarding the industry.*
1. *The different ratios are displayed with a segmentation to B2B/B2C. Due to considerably small differences we chose to exclude the segmentation for the AR, SBR and HBR.*
2. *The adoption of email techniques in the industry is shown for the B2B/B2C segmentation.*
3. *The mobile usage in the industry is shown for the B2B/B2C segmentation.*
4. *The graphs at the bottom show the distribution of campaigns sent during the day, month and hour and show the segmentation for B2B/B2C.*
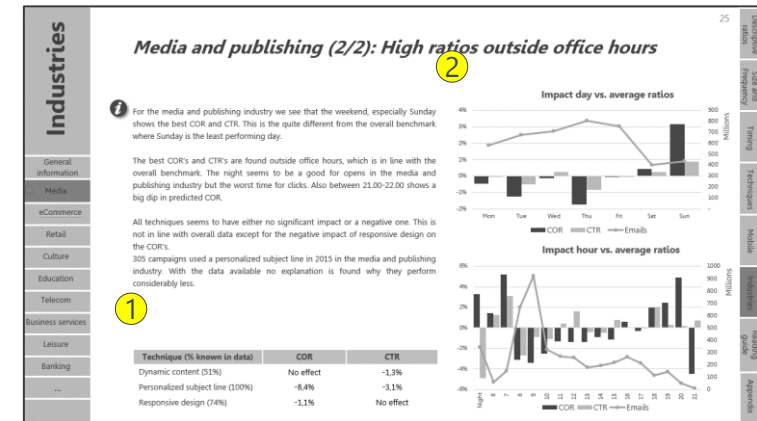
Figure 2. *This page contains information based on the predictive method.*
1. *The graphs on this page show the impact of a variable on the ratios, compared to the average ratio of the industry. The descriptive method results in a COR of xx% (page 1). The graph shows the deviation of the average for certain days or hours. If the impact is positive, this means that the COR is xx% higher than the average.*
2. *The table shows the deviation from the average for the specific email techniques. The interpretation of these values is similar to the above explanation.*

Historic benchmark data (2012 - 2016)

Ratios	Benchmark 2017	Benchmark 2016	Benchmark 2015	Benchmark 2014	Benchmark 2013	Benchmark 2012
COR	37,5%	35,2%	35,5%	31,9%	32,9%	34,0%
CTR	6,9%	7,0%	7,3%	7,3%	7,9%	8,1%
CTO	16,4%	17,5%	18,6%	20,6%	21,4%	22,1%
AR	99,1%	99,1%	98,9%	98,7%	98,5%	98,5%
SBR	0,4%	0,4%	0,5%	0,5%	0,6%	0,7%
HBR	0,5%	0,6%	0,7%	0,8%	0,9%	1,0%

Overall industry information

Industry	Campaigns	Emails (millions)	Campaign size (avg.)	Companies	Frequency (avg.)
Media & Publishing	24.417 (13,2%)	389 (8,3%)	15.919	77	317
eCommerce	21.250 (11,5%)	1.684 (35,8%)	79.241	95	224
Retail (mixed)	9.815 (5,3%)	274 (5,8%)	27.956	221	44
Business Services	9.726 (5,3%)	107 (2,3%)	11.048	158	62
Culture & Entertainment	7.039 (3,8%)	142 (3,0%)	20.122	90	78
Education	6.034 (3,3%)	47 (1,0%)	7.829	118	51
Leisure	5.569 (3,0%)	178 (3,8%)	32.027	54	103
Telecom Services & Equipment	5.451 (2,9%)	79 (1,7%)	14.467	22	248
Banking & Insurance	3.388 (1,8%)	36 (0,8%)	10.696	71	48
Energy & Natural Resources	3.374 (1,8%)	21 (0,4%)	6.180	23	147
Hotel & Catering	2.872 (1,6%)	204 (4,3%)	70.930	38	76
Healthcare	2.428 (1,3%)	30 (0,6%)	12.410	59	41
Travel	2.339 (1,3%)	291 (6,2%)	124.203	41	57
Construction Services	2.223 (1,2%)	25 (0,5%)	11.338	32	69
Charity	2.185 (1,2%)	124 (2,6%)	56.574	23	95
Government	2.023 (1,1%)	15 (0,3%)	7.586	34	60
Automotive	1.856 (1,0%)	89 (1,9%)	47.777	32	58
Not for profit	1.827 (1,0%)	23 (0,5%)	12.815	34	54
Industry & Producers	1.788 (1,0%)	9 (0,2%)	5.138	62	29
Agriculture	1.129 (0,6%)	5 (0,1%)	4.543	9	125
ICT & Internet	1.078 (0,6%)	18 (0,4%)	16.265	60	18
Wholesale	739 (0,4%)	7 (0,2%)	9.942	15	49
Transportation & Logistics	705 (0,4%)	5 (0,1%)	7.216	25	28
Fast Moving Consumer Goods	416 (0,2%)	4 (0,1%)	10.049	10	42
Other / unknown	65.113 (35,2%)	896 (19,1%)	13.766	2.112	31
Total	**184.784**	**4.703**	**25.452**	**2.901**	**64**

Ratios industries

Industry	COR	CTR	CTO	AR	SBR	HBR
Media & Publishing	35,8%	7,6%	19,6%	99,2%	0,5%	0,3%
eCommerce	20,6%	2,6%	11,6%	99,7%	0,1%	0,1%
Retail (mixed)	31,7%	4,5%	13,8%	99,5%	0,2%	0,3%
Business services	44,4%	7,4%	16,5%	98,2%	0,8%	1,0%
Culture & Entertainment	42,6%	6,5%	13,6%	99,3%	0,2%	0,5%
Education	42,0%	8,0%	17,9%	98,8%	0,4%	0,9%
Leisure	44,1%	9,1%	18,8%	99,1%	0,3%	0,6%
Telecom Services & Equipment	54,4%	12,4%	20,1%	99,0%	0,5%	0,5%
Banking & Insurance	59,1%	11,0%	18,0%	99,1%	0,4%	0,5%
Energy & Natural Resources	69,6%	11,8%	16,2%	97,3%	0,5%	2,3%
Hotel & Catering	24,3%	1,8%	6,5%	99,5%	0,2%	0,3%
Healthcare	37,6%	7,8%	20,2%	99,5%	0,2%	0,3%
Travel	26,5%	3,0%	10,8%	99,7%	0,2%	0,2%
Construction Services	54,4%	15,3%	25,5%	99,4%	0,2%	0,4%
Charity	45,1%	15,4%	23,7%	98,9%	0,6%	0,5%
Government	49,2%	10,6%	19,9%	98,9%	0,5%	0,7%
Automotive	48,7%	10,4%	20,4%	98,3%	0,6%	1,1%
Not-for-Profit	49,7%	6,4%	12,2%	99,3%	0,4%	0,3%
Industry & Producers	35,2%	5,9%	16,1%	98,2%	0,8%	1,0%
Agriculture	39,1%	9,1%	20,9%	99,4%	0,3%	0,3%
ICT & Internet	33,2%	4,8%	12,3%	98,0%	0,9%	1,1%
Wholesale	35,2%	4,4%	11,4%	99,1%	0,5%	0,4%
Transportation & Logistics	39,4%	8,2%	19,4%	98,5%	0,7%	0,9%
Fast Moving Consumer Goods	42,3%	8,0%	17,3%	98,8%	0,4%	0,8%
Other/ Unknown	37,0%	6,7%	16,6%	99,2%	0,4%	0,5%
Total	**37,5%**	**6,9%**	**16,4%**	**99,1%**	**0,4%**	**0,5%**

Ratios industries – Comparison 2016 & 2017

Industry	COR			CTR			CTO		
	2016	2017	Change	2016	2017	Change	2016	2017	Change
Media & Publishing	34,6%	35,8%	1,3%	7,8%	7,6%	-0,1%	20,7%	19,6%	-1,1%
Retail (eCommerce only)	19,3%	20,6%	1,3%	2,7%	2,6%	-0,1%	12,2%	11,6%	-0,6%
Retail (mixed)	32,2%	31,7%	-0,5%	4,8%	4,5%	-0,3%	14,5%	13,8%	-0,7%
Business services	35,2%	44,4%	9,2%	7,3%	7,4%	0,2%	18,5%	16,5%	-2,0%
Culture & Entertainment	39,1%	42,6%	3,5%	6,1%	6,5%	0,4%	14,3%	13,6%	-0,7%
Education	38,7%	42,0%	3,3%	8,5%	8,0%	-0,5%	20,1%	17,9%	-2,2%
Leisure	41,5%	44,1%	2,6%	7,4%	9,1%	1,7%	15,7%	18,8%	3,1%
Telecom Services & Equipment	48,0%	54,4%	6,4%	10,4%	12,4%	1,9%	19,5%	20,1%	0,7%
Energy & Natural Resources	59,0%	69,6%	10,6%	16,1%	11,8%	-4,3%	24,9%	16,2%	-8,7%
Banking & Insurance	53,7%	59,1%	5,3%	11,8%	11,0%	-0,8%	20,5%	18,0%	-2,6%
Hotel & Catering	26,1%	24,3%	-1,8%	3,2%	1,8%	-1,4%	15,9%	6,5%	-9,4%
Healthcare	36,1%	37,6%	1,5%	7,5%	7,8%	0,3%	19,5%	20,2%	0,8%
Travel	26,3%	26,5%	0,1%	3,6%	3,0%	-0,6%	12,9%	10,8%	-2,1%
Construction Services	45,4%	54,4%	9,0%	12,0%	15,3%	3,3%	23,5%	25,5%	1,9%
Charity	47,2%	45,1%	-2,1%	16,6%	15,4%	-1,2%	27,2%	23,7%	-3,5%
Government	46,8%	49,2%	2,5%	11,3%	10,6%	-0,7%	23,2%	19,9%	-3,3%
Automotive	47,0%	48,7%	1,8%	11,2%	10,4%	-0,8%	22,1%	20,4%	-1,7%
Not-for-Profit	43,9%	49,7%	5,8%	6,9%	6,4%	-0,5%	14,3%	12,2%	-2,1%
Industry & Producers	36,5%	35,2%	-1,3%	6,8%	5,9%	-0,9%	17,5%	16,1%	-1,4%
Agriculture	34,1%	39,1%	5,0%	7,2%	9,1%	1,9%	18,2%	20,9%	2,6%
ICT & Internet	30,5%	33,2%	2,6%	4,7%	4,8%	0,1%	13,3%	12,3%	-1,1%
Wholesale	30,9%	35,2%	4,2%	4,5%	4,4%	-0,1%	13,5%	11,4%	-2,1%
Transportation & Logistics	39,6%	39,4%	-0,2%	7,2%	8,2%	1,1%	16,4%	19,4%	3,1%
Fast Moving Consumer Goods	38,1%	42,3%	4,2%	8,6%	8,0%	-0,6%	20,3%	17,3%	-3,0%
Other/ Unknown	34,6%	37,0%	2,4%	6,6%	6,7%	0,1%	17,3%	16,6%	-0,7%
Total	**35,2%**	**37,5%**	**0,0%**	**7,0%**	**6,9%**	**0,0%**	**17,5%**	**16,4%**	**0,0%**