Brits vs. Yanks

How U.S. and U.K. Fashion Brands
Compare on Email Marketing

iterable

Introduction:

Who's Winning With Email?

Email marketing in the United States and the United Kingdom has much in common, beginning with the language. But there's plenty below the surface that separates these two email marketing powerhouses.

Some surface differences exist: color/colour, cart/basket, Main Street/High Street, holiday/Christmas.

Plus, U.S. marketers haven't caught on to the "payday" or "bank holiday" promotions that are a staple of U.K. marketing, although Boxing Day (Dec. 26) is beginning to make its presence felt.

And, of course, there's one big difference: Opt-out email is just fine for U.S. marketers but prohibited in the U.K. for consumers.

Some research studies have tried to pinpoint differences between U.K. and U.S. marketers, but they often conflict in their findings or concentrate only on email activity, such as opens, clicks, unsubscribes and spam complaints.

As revealing as these basic statistical comparisons can be, they don't tell us much about the differences between the two countries in email content, strategy and practices.

To that end, Iterable partnered with London-based Holistic Email Marketing to compare 20 retail fashion brands (10 U.S. brands and 10 U.K. brands) and found distinct differences in four areas:

- **Email content**
- **Strategy**
- **Performance**
- **Inbox placement**
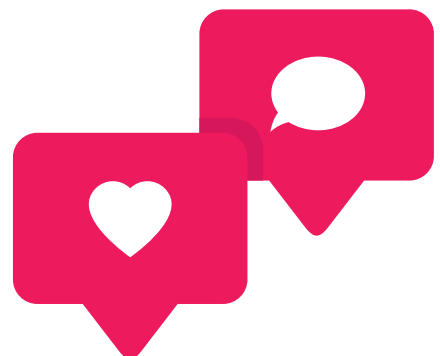
# What You'll Learn From This Study

This study expands on an Iterable User Engagement Teardown that studied how four U.K. fashion retailers addressed customer preferences and kept users engaged with their online stores.

No matter which side of the Atlantic you market from, you should study the results to learn how your email programs compare with your in-country inbox competitors and with your marketing peers across the pond.

Read on for advice on capitalizing on highlights and fixing weaknesses in your own email program. We've included notable lifecycle emails to see how other brands are putting data, automation and—in some cases—AI to create relevant and valuable messages.

However, if you're looking for a clear winner in the email game, you won't find one. U.K. email marketers excel in some areas, especially engagement and personalization of day-to-day email. Their U.S. peers have the edge in acquisition and lifecycle email personalization.

But our research shows that all brands have much work to do before their email programs can reach their full potential.
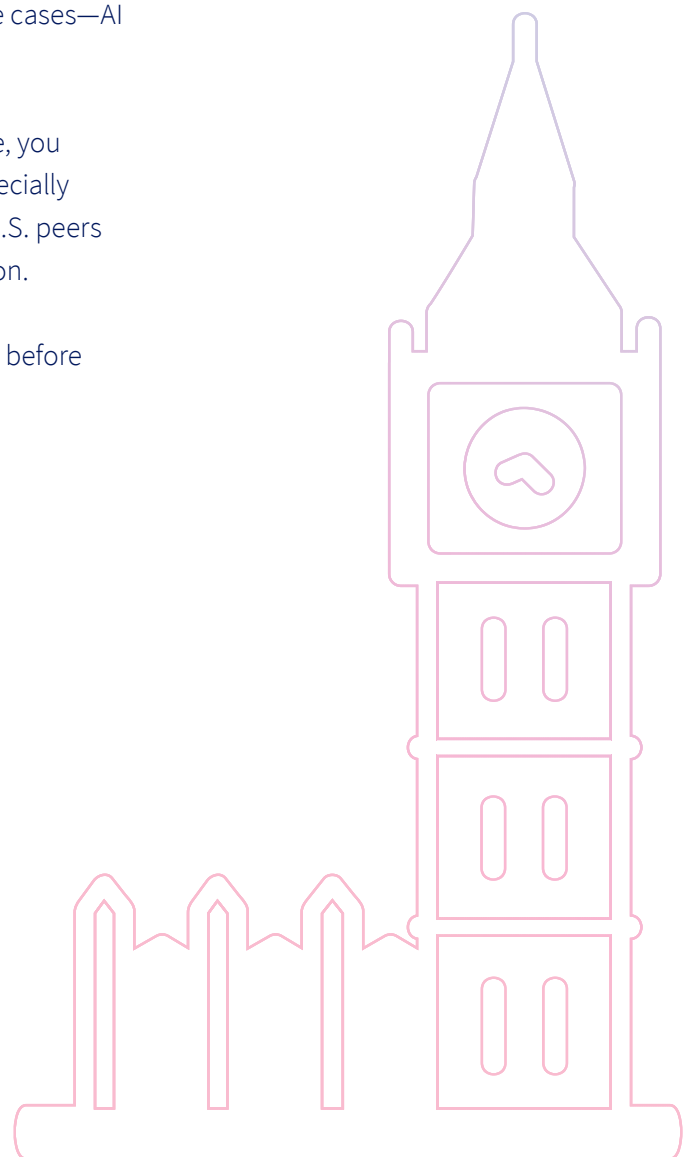
Background Information and Methodology

We studied both the promotional emails and lifecycle-based emails sent by 20 top retail fashion brands in the U.K. and the U.S. over the same 30-day period. We also used panel data from eDataSource's Competitor Tracker to study email performance and deliverability.

We used both quantitative and qualitative measurements, including the previously mentioned panel data, a qualitative content analysis, as well as research reported in earlier studies to analyze each brand and compare it on these factors:

- **Message read rates**
- **Deliverability rates**
- **Content and strategy**

U.K. Retail Fashion Brands

Alexander McQUEEN   ALLSAINTS

asos   Boden   BURBERRY

Paul Smith   PRETTYLITTLETHING

REISS   TED BAKER

TOPSHOP
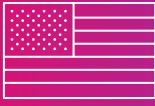
U.S. Retail Fashion Brands

Abercrombie & Fitch   ANN TAYLOR

CALVIN KLEIN   COLE HAAN

GUESS
LOS ANGELES   kate spade
NEW YORK   Levi's®

RALPH LAUREN   TOMMY ◼ HILFIGER

WHITE HOUSE BLACK MARKET

Results: Data and Content Analysis

Following are the primary results from both the data comparisons and content analysis in the 30-day study period.

Engagement

Metric used: Read rate: the percentage of delivered emails that recipients open and read.

Commentary: All of the top-ranking brands for engagement were U.K. retailers. Among U.S. retailers, Cole Haan and White House Black Market tied with read rates of 24% each. The average read rate for U.K. retailers was 22.4%; for U.S. retailers, 20%.

Rates vary widely: Although the three top U.K. brands scored higher than the highest-scoring U.S. retailer, the read rates for the 10 U.K. retailers varied more than the read rates for the U.S. retailers.

U.K. read rates ranged from 10% to 34%, a range of 14 percentage points. U.S. brands ranged a narrower 6 points, from 18% up to 24%.

Deliverability

Metric definition: Inbox placement of delivered emails

Commentary: Although deliverability rates are reported to be declining, all but one of the 20 brands in the survey scored above 90%. Brands whose inbox placement scores below 90% need to address it immediately.

For U.S. brands, emailing without permission is legal under the CAN-SPAM email regulations. However, it can put your inbox placement in jeopardy because unhappy recipients will either ignore your email or mark it as spam. For the record, all of the U.S. brands we studied use permission marketing.

Highest Read Rate

34%
Topshop (U.K.)

31%
Burberry (U.K.)

27%
Alexander McQueen (U.K.)

Highest Deliverability Rate

99%
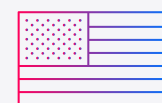Pretty Little Thing (U.K.)

98%
Topshop (U.K.), Cole Haan (U.S.)

Average Deliverability Rate

99%

98%

Personalization

Metric definition: Personalized content used in promotional and lifecycle messages (welcome, win-back, cart abandonment, browse abandonment, price drop, back in stock, repeat purchase, wish lists).

Commentary: Personalized email has become table stakes in the email marketer's quest for recipients' hearts, minds and attention. However, this study reveals that the U.S. brands are not using it to make their emails more memorable or useful in their day-to-day email messages, while U.K. brands are making a bit more of this opportunity.

More U.K. brands personalize content in promo emails, but, surprisingly, only a few used lifecycle campaigns within their program, while the majority of U.S. brands employed lifecycle campaigns to enhance their program.

Multi-lingual email

Metric definition: Email campaigns sent in languages other than English.

Commentary: In our global economy, many of the brands sell across borders or have physical locations in other countries so it can make sense to use multi-lingual content and even content localized to the recipient's country.

Subscriber acquisition practices

Metric definition: Presence and location of email opt-in invitations on brand homepage

Commentary: U.S. brand marketers have an edge for acquisition because each of the 10 had an opt-in invitation on the homepage—either a form built into the template or a temporary form that appears when the viewer either lands on the page or moves to click out of it.

Three U.K. brands had no mention of their email programs anywhere on the homepage, which is a clear failure for acquisition. Adding an opt-in form would be an obvious correction, but, as we discuss later in this paper, many marketers don't control or have a say in what goes on the homepage.

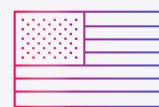### Personalization in Promo Emails

6/10
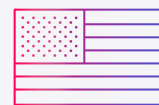
3/10

### Personalization in Lifecycle Emails

3/5[*]

9/10

* 5 U.K. brands didn't have any lifecycle programs that we could determine.

Subject line content

Metric definition: Qualitative review of the emotions that subject lines tap into.

Commentary: Both U.K. and U.S. marketers rely on fascination to pique recipient interest in opening their emails, but U.S. marketers are more likely to prod readers to open and act on their emails.

The anonymized example below is from eDataSource. The larger the circle, the more often the emotion is used. The higher the circle, the higher the read rate or engagement is for that emotion.
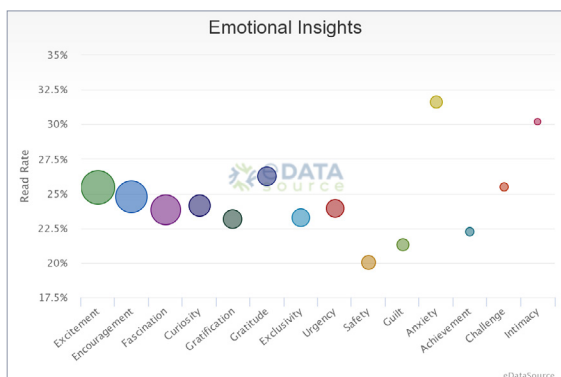
Email team composition

Metric definition: Brands that have marketing teams in other countries.

Commentary: It would appear that the U.K. is seen as the door to Europe, due to both its proximity, as well as the number of Europeans living in the U.K. The U.S. brands with only a U.S. marketing team can be explained by them primarily only selling to the U.S. using only English.

- We additionally polled other retailers who have audiences in other countries and found that the majority of them of them had teams in other countries, which are independently managed, such as Ralph Lauren and Kate Spade.

- The next popular arrangement was to have satellite teams in other countries, which are managed by the main marketing team. Third most common was one marketing team sending multiple languages with localized translations and the fourth was one marketing team sending only in English.

Primary Emotions *

😃 **Fascination**

😄 **Excitement**

Anxiety

Guilt

Urgency

Exclusivity

Gratification

* Based on 5/10 brands
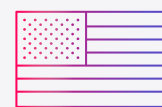
Primary Emotions **

😲 **Urgency**

😃 **Fascination**

Exclusivity

Excitement

Encouragement

Intimacy

Gratitude

Guilt

** Based on 6/10 brands

Email Team Composition

All but one were U.K.-only based
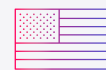
5 brands have U.K./ European teams

Lifecycle email use

Metric definition: Which emails brands use that correspond to a specific point in the customer lifecycle.

Commentary: We discovered that marketers have a long way to go to use lifecycle email to their full potential. U.S. marketers are more likely to send behavior-based emails (welcome, win-back and abandoned cart emails) while the price-drop and wish-list email is more prominent among U.K. marketers.

The lack of lifecycle marketing within U.K. brands could be explained by the high number of niche brands included in the U.K. brands reviewed. Also, marketers do more promo email personalization and offer multiple languages. Therefore, they might be lacking in resources to implement lifecycle programs.

Most Frequently Used Lifecycle Emails
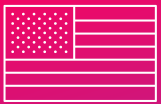
U.S.	U.K.
Welcome	Welcome
Cart Abandonment	Birthday
Win-Back	Browse Abandonment
Browse Abandonment	Cart Abandonment
Second Purchase	Price Drop
Birthday	Second Purchase
Wish List	Wish List

Major Findings

1   U.K. email engagement is higher, due in part to higher personalization

This finding draws on the higher read rates and greater use of personalized content within business-as-usual emails. The two figures are intertwined—emails with personalized content are more likely to be read, and read longer, than general broadcast email.

Dynamic content modules, which make this personalization possible, are becoming standard features on many email platforms, but brands need data to drive the personalized content. Some of the brands in this study used AI to add personalized content to their business-as-usual emails.

2   U.K. offers more multi-lingual emails than U.S.

U.S. brands' geographic isolation, compared to the U.K.'s proximity to European countries where English is not the primary language, might be one reason for the relatively low use of multi-lingual content. Or, it could be the expectation that recipients who engage with a U.S. brand will be conversant in English even if it's a second language. Or simply that some of the U.S. brands only market to the U.S.
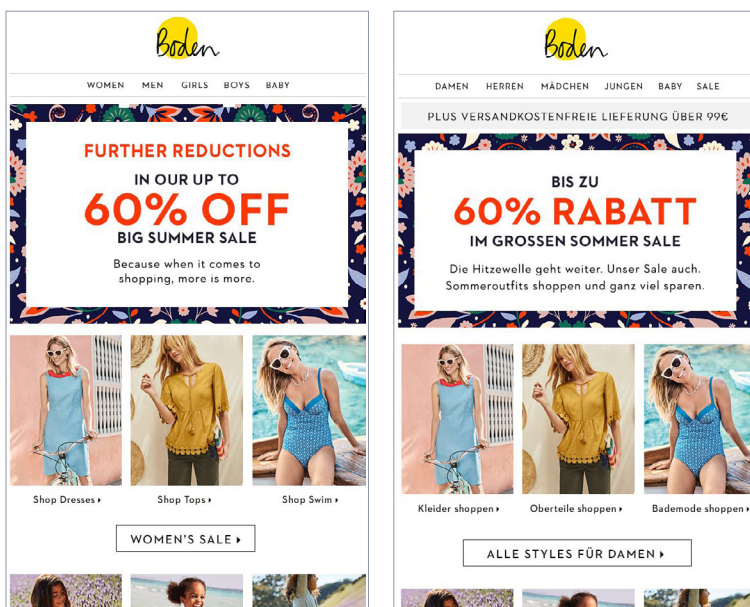
This email from Boden presents the same content in both German and English.

3 U.K. emails have higher inbox placement

With an average 96.2% inbox placement and all 10 brands registering 90% or higher, U.K. marketers enjoy a higher deliverability rate. Many factors contribute to deliverability, which is the result of complicated algorithms at the ISP level.

We know more than we used to—reader engagement and sender reputation are major drivers of higher inboxing—but the exact factors that an ISP uses to decide where to send an email remain buried in a thicket of algorithms.

U.K. marketers' higher engagement levels, lower volumes and use of personalization are likely a favorable combination for inbox placement. However, this finding is not tinder to re-ignite the blazing controversy on whether a brand should send more or less email as we did not address frequency in our analysis.

There's no exact answer because each brand has different goals, objectives, strategies and tactics to reach their own unique audiences.

With an average 96.2% inbox placement and all 10 brands registering 90% or higher, U.K. marketers enjoy a higher deliverability rate.

4 U.S. marketers have more aggressive acquisition and retention tactics

In this case, "aggressive" is not necessarily a negative. U.S. marketers were more likely to feature opt-in forms on their homepages, whether as a static form somewhere on the page or as a temporary form in a "popover."

U.S. brands are set up to gain more subscribers because more blend static web forms with temporary popover forms. Still, all brands are missing out on gaining more subscribers, which is the key to higher revenue, because few have the email opt-in form in the prime real estate at the top of the web page.

Most brands put the email form at the bottom of the page, and three U.K. brands had no opt-in invitation on their homepages.

See the discussion in the next section about why it's important for the email team either to own the web form or have a say in their design and placement, especially on the homepage.

All brands are missing out on gaining more subscribers, which is the key to higher revenue.

5 Many U.S. and U.K. brands are not taking advantage of lifecycle emails

We looked for brand use of nine kinds of emails that are tied to different stages of the email lifecycle as illustrated in this graphic depiction of a typical customer journey.

Lifecycle emails begin with a welcome program and include key points such as first and repeat purchases, cart abandonment, birthday and loyalty along with lapsing and win-back.

Once again, we were not completely surprised to find that adoption of many of these key emails is at or below 50% on all of these emails, based on previous Holistic Email Marketing research and work with clients.

U.K. brand Pretty Little Thing use a good selection of lifecycle emails and were one of the brands to have the most automated programs in place out of all 20 brands in our study.

"Automated programmes allow us to target customers based on lifecycle stage easily without daily input," said Abbie Hodgson, Pretty Little Thing's assistant CRM Manager.

Subscribers love welcome and abandoned cart emails because they're timely and relevant and can generate open and click rates well above 50% with good execution. According to Iterable's 2018 Benchmark Report, 80% of Iterable clients achieve up to 40% conversion rates on their cart abandonment campaigns.

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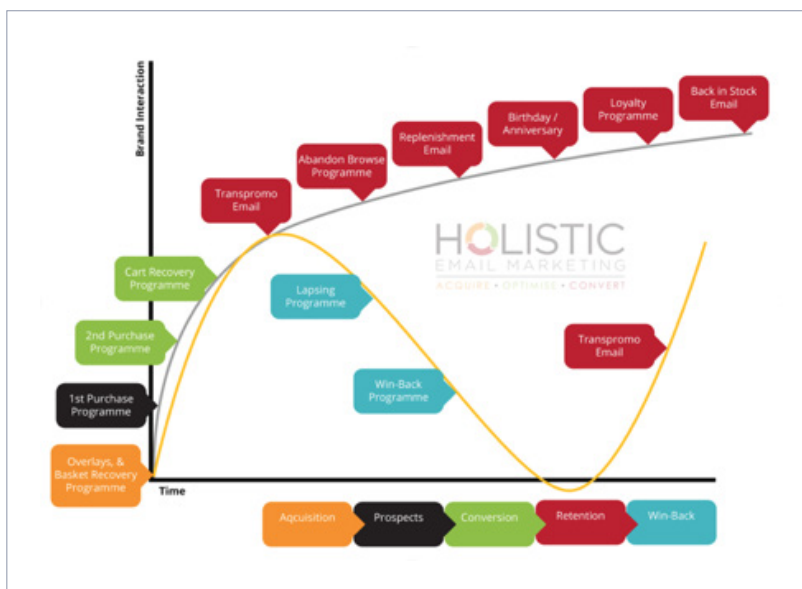
Improve Your Email Program with 3 Takeaways

1 Review your frequency plan to improve engagement

In our findings, we saw that two U.K. brands—Burberry and Alexander McQueen—had two of the three highest read rates among all 20 brands in the study. That's impressive. But it's only one side of the email coin.

Both brands also send the lowest number of emails per person in the 30-day study period. That can be a major factor explaining the high read rate. Your own inbox behavior shows you that if a brand emails you once a day, or sometimes more often even outside the holiday email season, then you know you can skip an email or two without feeling as if you might miss out.

Sending email more frequently will lower your open rate and, consequently, your read rate. But it also increases your reach and allows you to gain exposure to more subscribers over a certain period. On the other hand, emailing less frequently costs you opportunities to connect with your customers when they're in the market to buy, potentially delivering them into the arms of your inbox competitors.

Staying on top of your engagement numbers (open, click, unsubscribe, and complaint rates) and conversions can help you see whether increased frequency is reducing your email effectiveness.

Besides, emails don't have to be opened to drive action or keep your brand top of mind. The email "nudge effect" holds that just seeing your brand name in the inbox can compel a subscriber to go to your website and search for something to fill a need, as we can see from this finding from the U.K. DMA:

After receiving an interesting email, what are the 3 most likely actions you would take?

Action	2016	2017
Call the company	5%	6%
I don't receive emails I find interesting	9%	7%
Share the email	5%	9%
Go to their social network site or blog	13%	10%
Go to a competitor's website	15%	14%
Go to a comparison shopping website	22%	15%
Go to their physical/high-street shop	24%	21%
Go to the company's website via another route e.g. search online	41%	35%
Bear the information in mind for later use	40%	54%
Click on a link from the email	65%	56%
Save the email to refer to at a later date	42%	59%

Of the top five actions from an email, only one is a traditional "direct" marketing action – clicking a link from the email. It's also the only one that will show up in traditional email marketing metrics. The others are saving the email for reference; bearing information in mind; visiting the website through another route; visiting a physical outlet. The prevalence of these sorts of actions suggest that email serves a dual role as both a direct response medium and a more traditional, broadcast medium.

Worried about frequency? Move to an integrated, cross-channel approach. Stepping up frequency requires added testing and monitoring, especially during the holiday season when the email stream becomes a torrent.

If that doesn't sound like a feasible solution, consider expanding your digital reach. A growth marketing platform combines the power of email, SMS, push notifications and more to reach more of your customers where they are at the moment you want to contact them.

2   Look for strategic ways to overcome technology challenges and add personalization and expand adoption of lifecycle emails

This is a challenge for both U.K. and U.S. marketers, although in slightly different ways.

U.S. marketers need to step up their personalization game in their everyday emails, a move that can improve their open and click rates and, subsequently, improve inbox placement.

Conversely, U.K. marketers have many opportunities both to add lifecycle emails to their programs and to personalize the content that goes into them beyond mail-merging a first name into the subject line.

We expected to see a higher rate of personalization by brands in this study because multiple research reports show a majority of email marketers say they use it. Then again, maybe we're seeing the gap between what people say and what they do.

Personalization pays. We know this because a Holistic Email Marketing study (Customer Experience Email Marketing: Getting Ahead of the Customer) found 67% of brands with emails that scored higher than average on personalization, helpfulness and customer focus earned higher reader engagement than below-average emails.

One factor holding back personalization, of course, is having the technology and data to make it happen. Some marketers use email platforms that don't offer data integration and automation—the two main ingredients of a successful personalization program.

However, many others have the technology but aren't using it. The Email Vendor Satisfaction Report found that half or more of marketers are not using their email platforms to their fullest advantage, including personalization.

These two Topshop emails (next page) might appear the same. But, look closer. The subject lines and merchandise assortments are different. Most likely they are based on browse or purchase activity without calling recipient's attention to the data the brand holds on them.

Half or more of marketers are not using their email platforms to their fullest advantage, including personalization.

3 Fight for access to the website to promote email effectively

You have many channels for acquiring new subscribers, but your website is still your No. 1 source for opt-ins. So why do so many sites hide the email opt-in invitation in the virtual oblivion of the footer or less noticeable places?

Certainly not because the marketer asked the web design team to put it there. But at many companies, the web team—not the email team—owns the website and decides what goes where.

In a study of webpage ownership, we learned that email teams at 24% of the companies we studied were in charge of web forms, while web teams owned the forms at another 24% of companies.

That means that the email teams at those companies, who are charged with and rewarded on growing the marketing database, don't control the main growth tool—the web forms.

We've found that consumer brands who are winning at email subscribe forms share these traits:

- **They go above and beyond best practice, making creative use of technology.**
- **They write clear, jargon-free opt-in messaging.**
- **They sell the benefits of signing up to their lists.**
- **They use popover forms optimized for high conversions.**
- **Their web forms are prominent in every relevant location.**

Having your static web form in the top half of the homepage is the best way to get it noticed and acted on. But homepage real estate is a prized commodity. Everybody wants a piece of it.

If you can't persuade your higher-ups to give you ownership or at least a stake in what goes where, build a business case for better placement. Show by your web team and execs how email drives revenue, reduces churn and helps other departments run more efficiently.

Email teams at 24% of the companies we studied were in charge of web forms.

8 Stand-Out Lifecycle Emails

We promised you some inspirational email examples, and here they are.

You'll notice that in each of these emails some images are pixelated. That's because they include personalized information that would be visible to the recipient but not in the general eDataSource database where we found them.

Although you can't see the content, they do show you how the brands combine static and personalized content. In many cases, this creates serendipity: your customers don't see the personalization that their data helped your content algorithms choose.

They just see that the email contains content that's relevant. This also helps you avoid any situations where a highly personalized email can come off as creepy rather than cool.

1 **Welcome**

2 **Second purchase**

3 **Browse abandonment**

4 **Cart abandonment**

5 **Price drop**

6 **Birthday**

7 **Wish list**

8 **Win-back**

$79.95

ADD TO CART

1 Welcome

2 Second purchase

3   Browse abandonment

Once browsed, never forgotten?
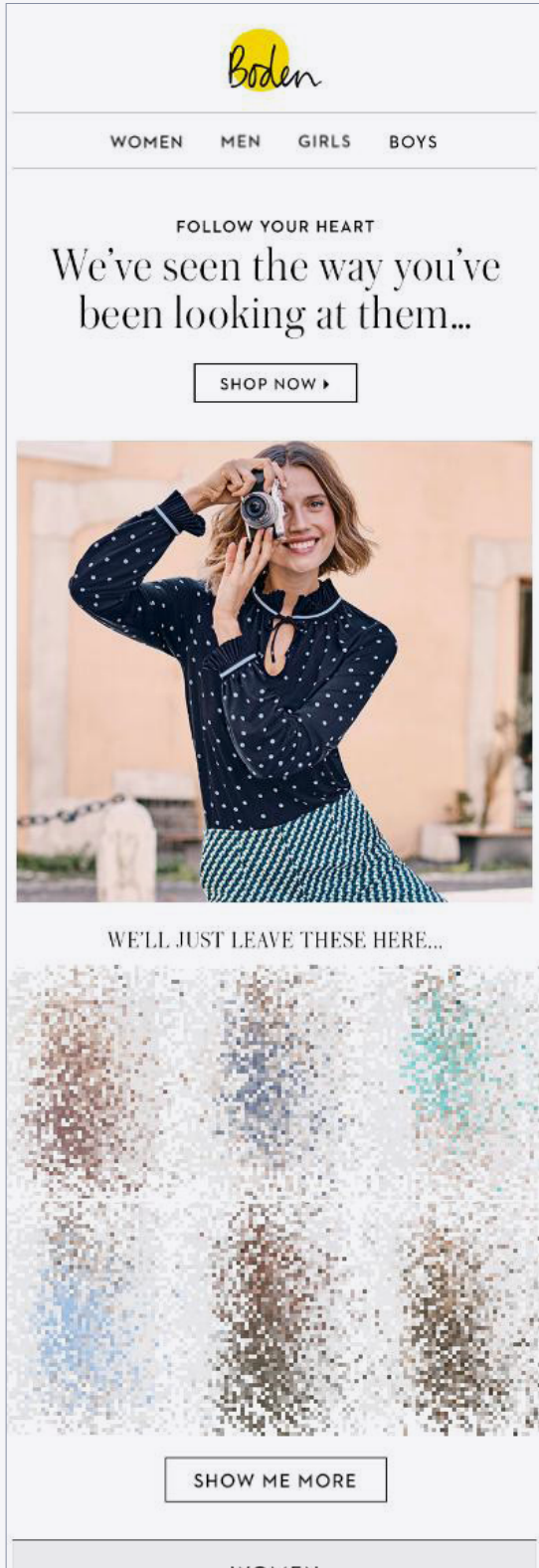
4   Cart abandonment

Shop Now, Before Your Shopping Bag Is Gone

5   Price drop

6   Birthday

7 Wish list

You've got great taste. these are selling fast…

8 Win-back

We Miss You (And You're Missing Out)

Conclusion

We hope your reaction in reading our findings and browsing our email highlight gallery is, "Cool! Let's see where we can get started!" rather than, "Yeah, that's all very interesting, but I don't have the time/budget/ resources to change anything."

None of the brands in our study started out on Day 1 with a fully developed personalization program, sending highly polished email messages that mix static and personalized content, hit all the key points on the customer lifecycle and get opened and acted on every single time.

Instead, they achieved this over time, trying something new, testing and tweaking it and adding a new trigger or program that builds on their previous successes.

You don't have to overhaul your entire email program at once. Instead, take it one small step at a time. What could you do today to update or expand on even one email that would help you serve your customers better and, thus, produce better results for your company?

Look at your email platforms and database. Chances are, you have features available to you now that you're not using because you don't know how to make them work. Are you missing data? Find a way to begin collecting that data. Then, use your platform capabilities to integrate it with your content to make it more personalized.

And if your email platform doesn't have the capability to get you where you want to go, it's time to call on Iterable.

About Iterable

Iterable is the growth marketing platform that enables brands to create, execute and optimize cross-channel campaigns with unparalleled data flexibility. Leading brands, like Zillow, SeatGeek, DoorDash, and Box, choose Iterable to power world-class customer engagement throughout the entire lifecycle.

Data Flexibility at Your Fingertips

Access real-time user, behavioral and event data to trigger personalized messaging at virtually unlimited scale. Support an audience of millions while appealing to each subscriber's unique preferences.

Unified Brand Experience

Orchestrate seamless customer engagement across email, mobile push, SMS, in-app, web push, direct mail and more throughout every lifecycle stage, from activation to re-engagement.

Agile Iteration & Optimization

Launch, measure and fine-tune campaigns with ease to deliver more relevant messaging faster than the competition. Experiment and iterate on-demand to determine the right content, channel and cadence for each user.

Customer Journey Mapping

Visualize the entire customer journey and build sophisticated, cross-channel segments and campaigns with Iterable's intuitive, drag-and-drop Workflow Studio.

If you want to learn more about Iterable, please request a demo.

REQUEST A DEMO

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SeatGeek

DOORDASH

imge.

fabfitfun

asics

Zillow