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[Newsletter](#) > [Asia Pacific](#) > [2009](#) > [Aug](#) > [Headline Feature](#)

**Are you really talking a language your customers can understand? Epsilon's recent Global Consumer Email Study highlights the need for localised, customer-centric, rather than campaign-centric marketing.**

It should come as no surprise that, according to Epsilon's Global Consumer Email Study, consumers around the world are using online communication tools and responding to permission-based email (PBE) in varying ways depending on where they come from.

Just as logical is the evidence that ever-increasing volumes of global marketing expenditure are migrating away from traditional advertising and into digital: Zenith Optimedia's most recent report concludes global advertising revenues will slump 8.5% in 2009, yet predicts 10.1% growth in Internet-based marketing. The overall digital sector is forecast to move up to over 15% of total advertising revenues by 2011.

So far, so predictable. What is surprising, however, is the very significant differences in national habits and preferences when it comes to online communications - and particularly the strong regional variance between Asia Pacific on the one hand and Europe and the United States on the other (although, reasonably enough, Australasia tends to align more with the North American model).

The survey, conducted by ROI Research in April 2009 and based on responses from over 4000 consumers in 13 countries, shows that email remains the mainstay communication worldwide. However, North American (87%) and European (74%) respondents are more likely than their peers in APAC (58%) to use email as their primary online communications tool.

Instant messaging (IM) scores very high in APAC as the principal online communication medium with 28%, while text/SMS and social networking remain consistently low across all regions. Most consumers continue to manage one primary inbox for the programs they subscribe to, however mobile phones and PDAs are gaining popularity for time-sensitive alerts such as news, weather and finance/stock information.

Email is also progressively replacing other channels of communication. Over one-third of respondents have replaced traditional channels with email for

communications from banks (40%), promotional postal mail (38%) and telemarketing (34%), and there is a clear tendency for email to continue to displace offline coupons (14%) and telemarketing (28%).

Permission-based email (PBE) is particularly effective in Asia Pacific. PBEs are more likely to elicit actions from APAC respondents, including clicking on a website, signing up for more information, watching a video clip, clicking on an advertised link or making on- or offline purchases. APAC also leads in reported usage of a PDA or Smartphone for email with 32%, significantly more than North America (9%) and Europe (7%).

Drilling down into the findings for individual APAC countries, the survey reveals some fascinating local variations, all of which are potentially extremely valuable to marketers:

- In Singapore, instant messaging and SMS are very popular (31% and 23% respectively), although email remains the primary online communication tool for 43% respondents. Singapore respondents also receive far more business and work related emails than respondents from other APAC countries.
- Hong Kong has the region's highest usage of mobile devices for email, at 37%, an increase of over 25% from last year's result (29%). However, respondents from Hong Kong are less likely than other APAC respondents to say they frequently purchase online (6% vs 21% of other APAC) and offline (9% vs 24% of other APAC) as a result of receiving coupons/offers, although over one-third say they would do so occasionally for both online and offline.
- China has the highest use of IM as a primary online communications tool, at 44%, running neck and neck with email on 45%: this contrasts with an average 71% of respondents from other APAC countries nominating email as the prime tool, with only 12% predominantly using IM. In terms of their likelihood to open a commercial email, the "Who" (the sender) and "What" (the subject line) are equally important in influencing Chinese consumers, as opposed to strong preferences for the "From" line in other regions. Chinese respondents from are also more likely to respond to "Subject" lines that contain discount and free product offers.

Respondents from China are more likely to purchase online (74%) and offline (62%) as a result of opening commercial emails than respondents in other APAC countries.

- In India, the "Subject Line" is more important than "From" for consumers in determining whether or not to open a commercial email. In Europe, North America, Japan, Hong Kong and Australia, for example, recognising who the sender is ranks as far more influential. Only 52% of the respondents from India said they would purchase online as a result of opening commercial emails, far less than the 70% from other APAC countries.
- Only 25% of Malaysian respondents use mobile device for email, while over half use text/SMS as their primary online communication tool. Many Malaysians don't make purchase online (70%), or offline (61%), with e-coupons.

- The reported PDA/Smartphone usage for email in Japan is 11%, which on the surface appears surprising considering Japan has one of the highest mobile phone penetration rates (75%) in the world. However we believe this has more to do with the definition of PDA and Smartphones in Japan than a lack of mobile email activity. Japanese consumers and business executives alike have been using their clam shell form factor mobile phones to manage email for over a decade and have always had mobile phones with 'smart' features. But with the introduction of the iPhone the market is now starting to redefine what makes a device a SmartPhone.

Japan also has the highest rate in APAC (84%) of the respondents who use email as their primary personal online communications tool, yet only 12% said they have forwarded email to friends after opening a commercial email. Japanese respondents receive the highest volume of emails among all APAC countries, at nearly 300 per week - on a par with North American levels.

- Australia has the lowest PDA/smartphone usage of all the surveyed countries for accessing emails, but the second highest percentage of respondents in the APAC region after Japan for using email as the primary online personal communication tool.

Overall, the survey also suggests very strongly that digital marketers need to move from campaign-centric planning and execution to customer experience/lifecycle marketing. Email continues to prove itself a highly effective marketing tool, but should no longer be viewed as an isolated channel: consumers are interacting with brands and suppliers across multiple channels, consequently databases must also be multi-channel and "network" aware.

This makes measurement of results by channel not only more important, but also more difficult, especially when it comes to allocating investment by segment across channels. Another key factor is the inherently time-sensitive nature of responses to digital marketing: when we communicate is as now just as important as what we communicate. It really is time to break out of the marketing campaign calendar mode.

By far the most important takeaway from Epsilon's 2009 Global Consumer Email Study is the value of studying and responding to local cultures, habits and preferences. Fine tuning the marketing model to individual user bases may take a little more time and effort, but it will make the vital difference in terms of success. And maybe it's comforting after all to be reminded that in this age of globalisation, one size certainly does not fit all! ■

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*Epsilon's 2009 Global Consumer Email Study was conducted in April 2009 by ROI Research, of Lancaster, PA in the US, and compiles data from 4084 responding consumers in 13 countries: US, Canada, China, Singapore, Hong Kong, Australia, India, Malaysia, Japan, UK, France, Germany and Spain. The study builds on similar research conducted in the US from 2002-2005 and APAC in 2008. Additional in-depth information about the Global Consumer Email Study can be found at [www.epsilon.com/globalemailstudy](http://www.epsilon.com/globalemailstudy).*