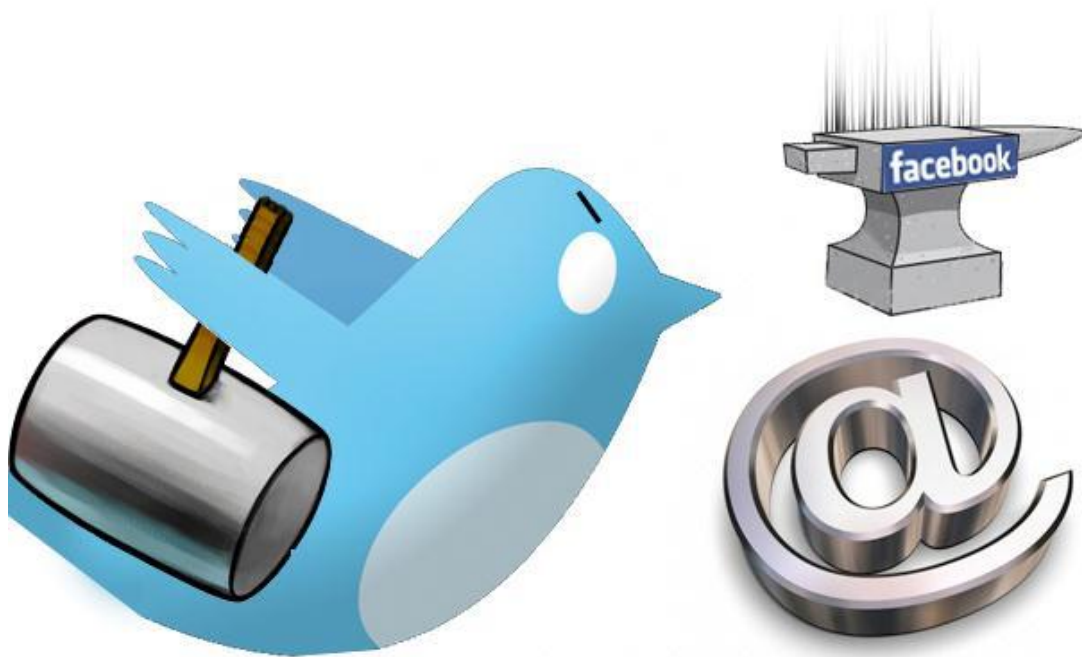


Trajection 9: The Email is Dead! Long Live the Email!



In September 2008, David Christopher of *Stop! Think Social* confidently predicted the death of email by 2018¹, to be replaced by something more collaborative as the online world became rapidly more 'social'. Just before we established Trajectory Global Foresight in early 2011, data released by ComScore (and much anecdotal evidence²) seemed to support the assertion that email was plunging headlong towards the communications scrapheap to join the likes of the fax machine and the pager (at least this was how many tech journalists interpreted it³; Comscore's press release actually provided a far more nuanced picture⁴) – over the course of 2010, the amount of time people spent using web-based email in the US declined by 8%⁵. The decline was particularly extreme for those aged 12-17 (59%), whilst there were more modest reductions for every age group up to 54 year olds. Figures were similar

¹David Christopher, 'The Death of Email', *Stop! Think Social*, <http://www.stopthinksocial.com/blog/2011/7/7/the-death-of-email-by-2018.html>, accessed 29/11/12

²For example, Atos' 'zero email initiative' - http://atos.net/en-us/about_us/zero_email/default.htm

³Alexia Tsotsis, 'ComScore Says You Don't Got Mail: Web Email Usage Declines, 59% Among Teens!', *Tech Crunch*, <http://techcrunch.com/2011/02/07/comscore-says-you-dont-got-mail-web-email-usage-declines-59-among-teens/>, accessed 29/11/12

⁴'Email Evolution: Web-based Email Shows Signs of Decline in the U.S. While Mobile Email Usage on the Rise', ComScore, http://www.comscore.com/Insights/Press_Releases/2011/1/Web-based_Email_Shows_Signs_of_Decline_in_the_U.S._While_Mobile_Email_Usage_on_the_Rise, accessed 30/11/12

⁵There was a similar picture over the course of 2011 according to ComScore's data with young people in particular reducing the time spent on web-based email – Donald Melanson, 'ComScore report finds drastic shift from web-based to mobile email among younger users in past year', <http://www.engadget.com/2012/02/11/comscore-report-finds-dramatic-shift-from-web-based-to-mobile-email/>, accessed 30/11/12

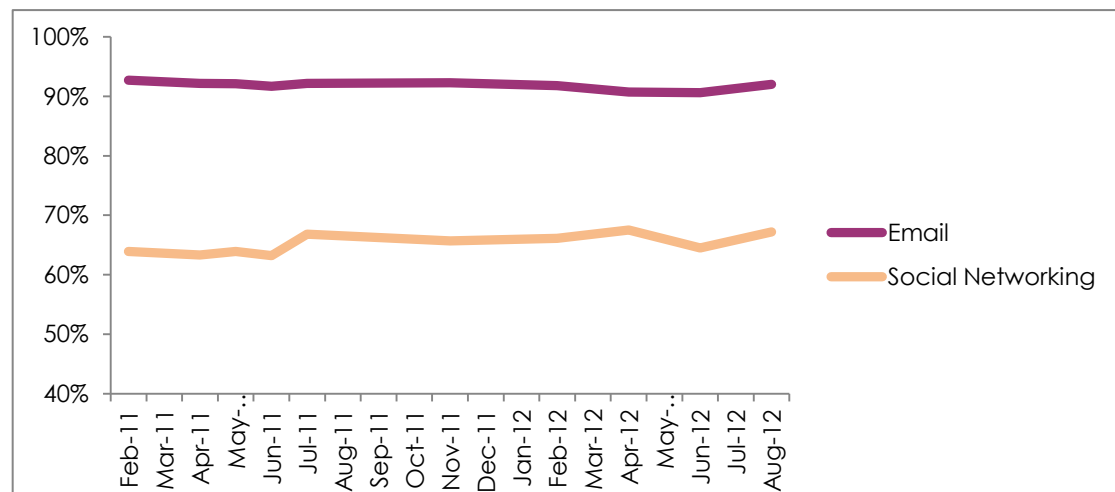
for web-based email within Europe over the same period of time, and in both USA and Europe, there were significant increases in the amount of time spent social networking.

A post-mortem?

So we decided to look at what our Trajectory Global Foresight survey has to say about email usage trends since then and to see if email is dying this supposed slow death. What we discovered painted a very different picture.

Over the past 18 months, there has been no drop in the numbers of email users around the world, despite a slight increase in numbers of social networkers in our Trajectory Global Foresight sample. Indeed this is still the case when countries are looked at individually over this time period. So just as a point of comparison with the Comscore data, it's worth highlighting that, in the USA, email user levels have remained consistent at roughly 95%.

Fig. 1: % who use the internet for email, globally

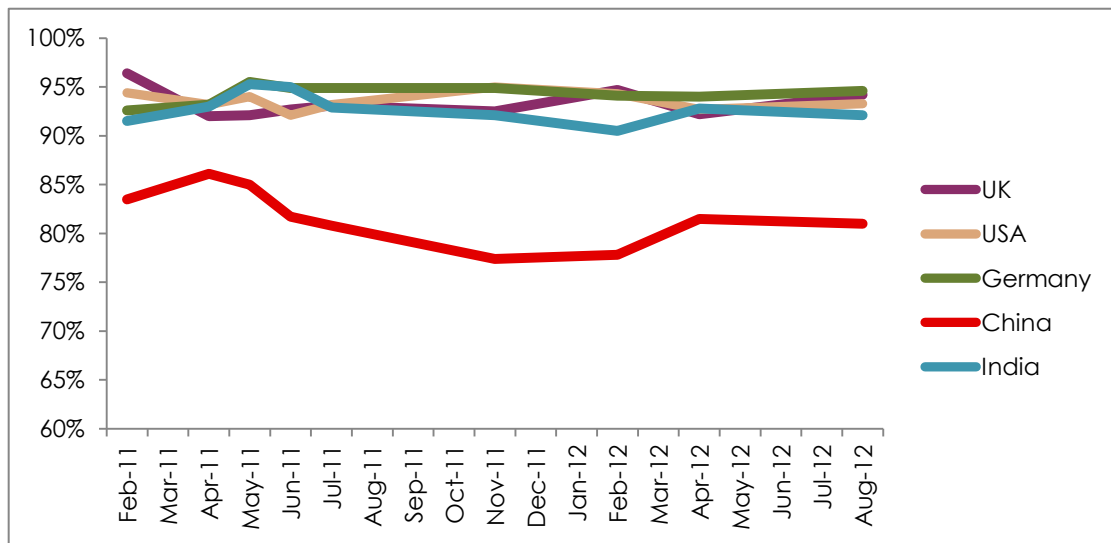


Source: Trajectory Global Foresight 2011-12

Base: 62,500 internet users

So despite increases in the number of users of social networks, an initial assessment of this data suggests that social media is not completely replacing email as David Christopher suggested it would. Indeed, if it was replacing email, we would expect groups who contain higher proportions of social media users to have lower proportions of email users. According to Trajectory Global Foresight data, this is not the case.

Fig. 2: % who use the internet for email



Source: Trajectory Global Foresight 2011-12

Base: 62,500 internet users

Who uses email?

The first and biggest of these groups is emerging market consumers. Partly due to the younger demographic of internet users in emerging markets, who have grown up in a digital age, and partly due to their tendency to leapfrog advanced markets in the way they use technology (for example, in Q2 of 2012, 40% of TVs shipped in China were smart TVs, compared to 20% in USA⁶), emerging market internet users are much more likely to use social media than advanced market internet users – in August this year, 3 in 4 (76%) of emerging market consumers who use the internet use it for social networking compared to 3 out of 5 (61%) in advanced markets, but in both emerging and advanced economies, 9 out of 10 (91% in advanced and 92% in emerging markets) internet users use it for email.

⁶ 'In China, Online Content Drives Smart TV Adoption', e-Marketer, [http://www.emarketer.com/\(S\(t1dbt545e1mlujknbacinbo\)\)/Article.aspx?R=1009463](http://www.emarketer.com/(S(t1dbt545e1mlujknbacinbo))/Article.aspx?R=1009463)

Fig. 3: % who use the internet for social networking

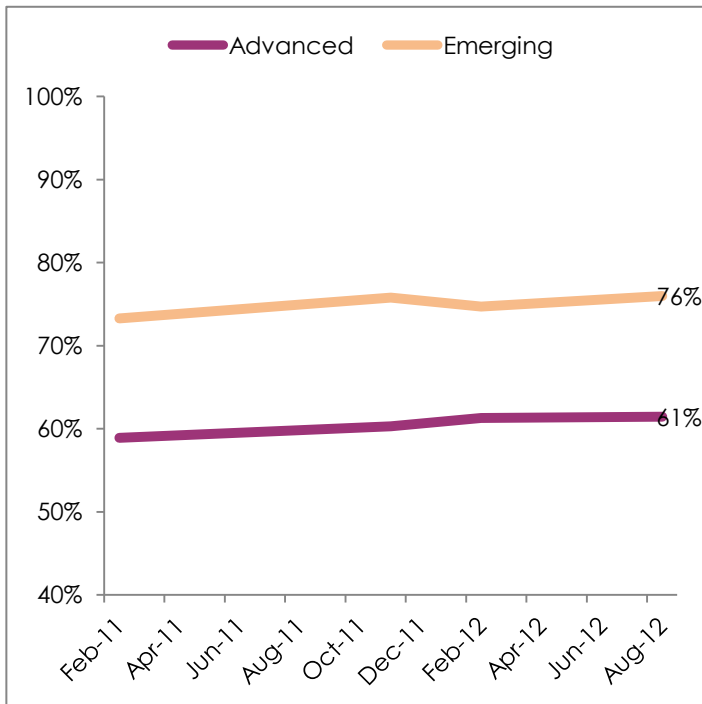
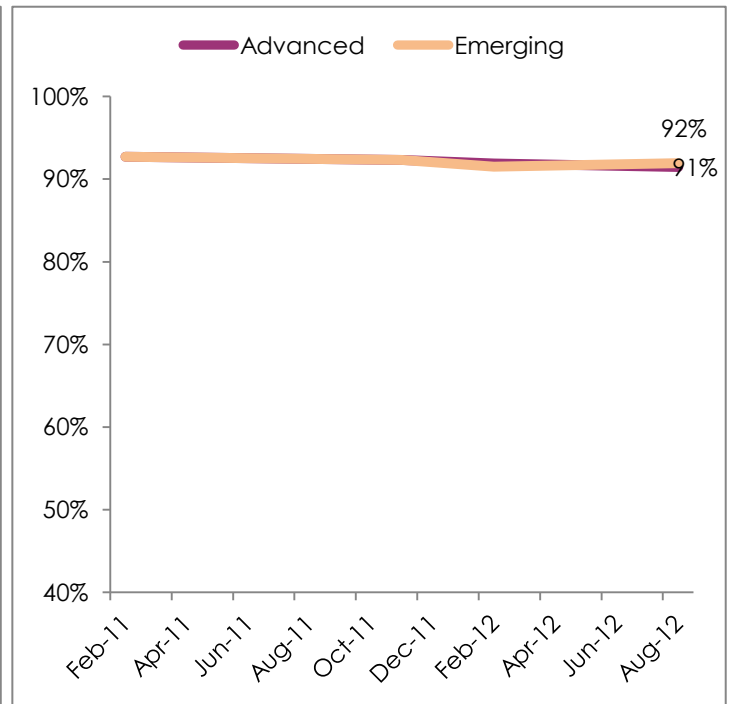


Fig. 4: % who use the internet for email

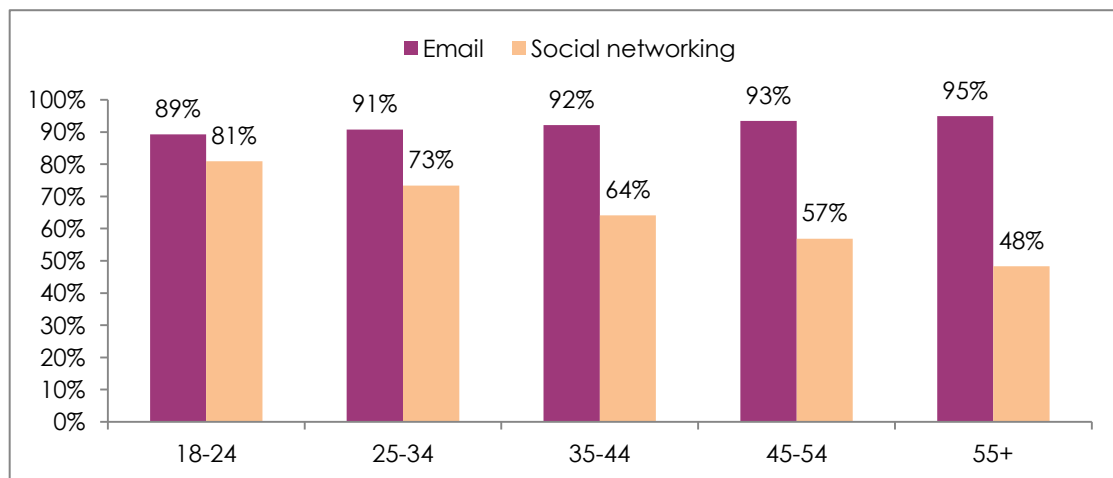


Source: Trajectory Global Foresight 2011-12

Base: 62,500 internet users

The second key group are younger internet users worldwide. As digital natives, they are also far more likely to use the internet for social networking – 4 out of 5 (81%) of 18-24 year old internet users around the world use social networks but less than half (48%) of over-55 year old internet users do. But again, this does not translate into significantly lower levels of internet use – still 9 out of 10 18-24 year old internet users around the world use email.

Fig. 5: Use of the internet by age, global



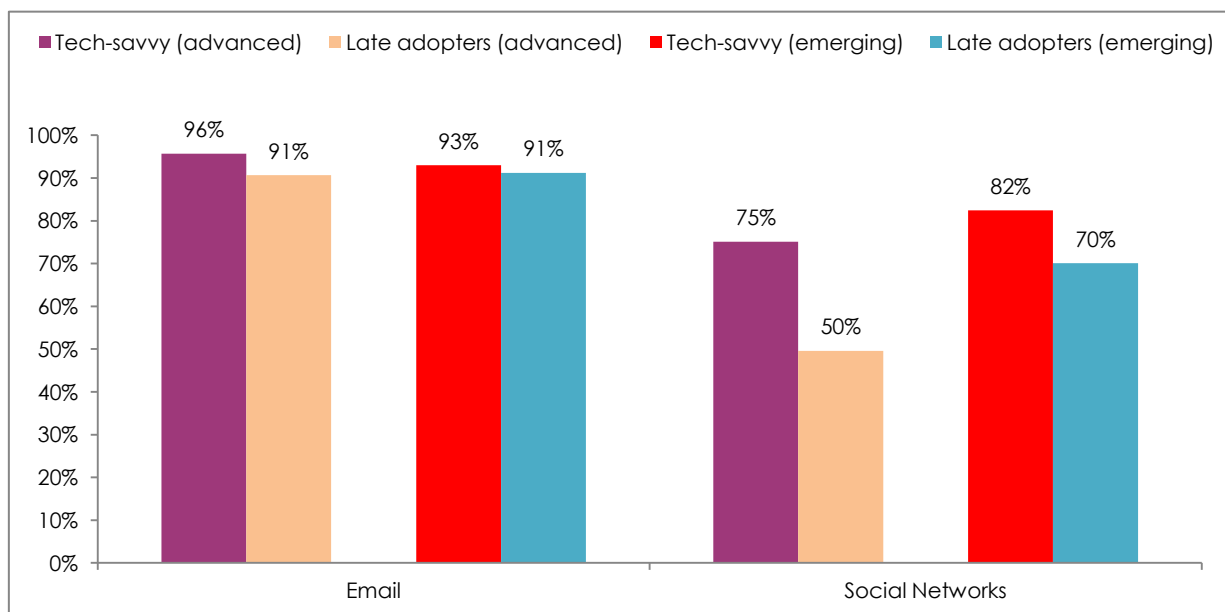
Source: Trajectory Global Foresight 2011-12

Base: 62,500 internet users

The third group which provides us with an indication for the future of email use is tech-savvy internet users of all ages. Since they're ahead of the curve, if they are beginning to stop using email, then we would expect the mass market to follow the same trajectory and gradually reduce their use of email too. If we judge 'tech-savvy' by ownership of a smartphone **and** a tablet, then it becomes apparent that the more tech savvy one is, the more likely they are to use social networks – in advanced markets, for example, 75% of tech-savvy group use social media, whilst only 50% of internet users in advanced market who don't have access to a tablet or a smartphone (what one could call late adopters) use social networks.

But, when we look at the email habits of the tech savvy it becomes apparent that they have not stopped using email. In fact, being tech savvy and having access to a tablet and a smartphone increases likelihood of email use. For example in advanced countries, 96% of our tech-savvy group are email users compared to 91% of our late adopters.

Fig. 6: Use of the internet by ownership of both phone and tablet (tech-savvy) and neither (late adopters)



Source: Trajectory Global Foresight 2011-12

Base: 62,500 internet users

Clearly then social media is not replacing email nor is it preventing people from adopting it. So why has the ComScore data referred to earlier been interpreted to tell such a different story?

So what's the story?

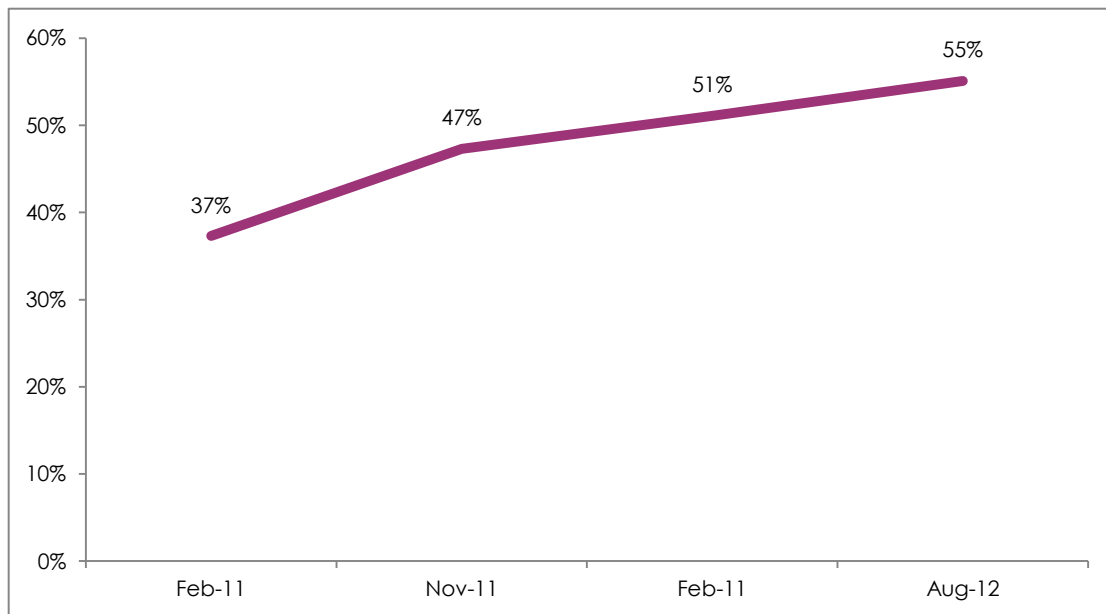
There are two key differences between the two sets of data and closer inspection reveals that the two data sources actually complement each other rather well:

(i) ComScore's data is referring to the use of web-based email. This does not include time spent using email on mobile devices. Given the proliferation of email-enabled phones in the past 3 years (see chart below) and the higher likelihood of smartphone owners using email (demonstrated in the chart above) especially given much early smartphone adoption was for business use where use of email is almost ubiquitous, it is plausible that total time spent emailing is just as high, but that use of mobile-based email has replaced much of the fall in web-based email reported by ComScore (indeed Comscore's press release which accompanied this data release also revealed an increase in accessing email through mobile devices – some tech journalists ignored this). Ofcom data⁷ supports this assertion: in the UK more than 1 in 3 smartphone owners use social networks (37%) and email (35%) less from a PC/laptop since getting their smartphone; whilst internationally⁸ between 2010 and 2011, the proportions of internet users who use their mobile phones for emails has risen to around 1 in 3 (this is still higher than use of social networks, which is between 25% and 30%).

⁷ Ofcom, *Communications Market Report 2011/2012*

⁸ Ofcom, *International Communications Market Report 2011* – covers UK, France, Germany, Italy, USA and Australia

Fig. 7: % who have access to a smartphone, globally



Source: Trajectory Global Foresight 2011-12

Base: 62,500 internet users

(ii) Arguably the more important point of difference between the two statistics is that the Comscore data which was cited in support of declining email usage is recording the amount of time spent using email whilst Trajectory Global Foresight records any use. Therefore there's every possibility that most people are still using email but just less frequently as they begin to use social media more. And it's important to remember that there a broad (and ever increasing) variety of communication channels and purposes of communication, with some channels and forms of communication better suited to these different purposes. Communication via social media could simply be replacing certain aspects of email communication, thus meaning that email has a smaller, yet more specific role within a broad portfolio of communications channels. This area needs further, in-depth investigation, but there is certainly evidence to suggest that this is the case, which can point us in the right direction in terms of discovering what email's role in this portfolio is and how it will develop over time.

The need for email

Ofcom's *Communications Market Report* for the UK distinguishes between channels of communication with friends and family and with businesses and services. The differences this research reveals convey just how much different forms of communication are used for different purposes. For communications

with friends and family, social networking has become almost as common as email (in fact in terms of daily use, even more people use social media than email (32% vs. 30%)). However, emails ranks much higher than social media as a means of communicating with businesses and services, with 1 in 4 (24%) people using it each week for this purpose – only face-to-face communication comes higher. This is in stark contrast with social networking which is only used by 6% of people each week to communicate with businesses and services.

Fig. 8: Channels of communication, UK

Rank	Means of communication	% who use each week to contact <u>family and friends</u>	Rank	Means of communication	% who use each week to contact <u>businesses and services</u>
1	Face to face	86%	1	Face to face	28%
2	Text messages	70%	2	Emails	24%
3	Voice calls on mobile phone	67%	3	Voice calls on mobile phone	21%
4	Voice calls on fixed landline	55%	4	Voice calls on fixed landline	20%
5	Emails	47%	5	Text messages	13%
6	Social Networking	41%	6	Post	13%
7	Instant messaging	34%	7	Social Networking	6%
8	Comments on websites	18%	8	Comments on websites	6%
9	VoIP (e.g. Skype)	17%	9	Instant messaging	5%
10	Micro blogging (e.g. Twitter)	11%	10	VoIP (e.g. Skype)	3%
11	Post	10%	11	Micro blogging (e.g. Twitter)	3%

Source: Ofcom Research, 2012

Base: 1,980 UK respondents

What's more, Ofcom's research actually suggests that, far from dying, email usage has been on the increase in the previous two years. The net % change in the use of email is a 17% increase over the past 2 years, whilst communication via social networks has increased by 14%. Admittedly the increase in use of email by 16-24 year olds is much lower (a net increase of 6% compared to 31% for social networks), yet the fact that email usage is still on increase for these digital natives really reinforces the assertion that email is not in terminal decline.

Clearly then, email is not in its death throes. Rather it has a more complex and evolving role in an ever-broadening portfolio of communications channels. In the UK at least, it is one of the most important means of communicating with businesses and it doesn't look like social media is about to take over any time soon. As a channel for such communication, email has a couple of distinct advantages – firstly, it allows for a flexibility and depth in marketing messages that social media does not (there are no 140 character limits in emails, for example) and secondly of it has greater perceived levels of privacy. More than half of internet users globally (54%) say concerns about the privacy of their personal information online limits the way they use the internet. Clearly, no-one wants their receipts and tickets posted on Facebook or to share every single catalogue they subscribe.

Dark Social

It's also a mistake to believe that all online social communication is made through social networks. The internet originated from a desire to exchange information more quickly, with more typical social networks not coming to the fore until decades later. Much online 'sharing' is still done through other media, including email. Once more privacy is email's strong suit here – not every social message and article or website shared is one that consumers want revealed with their entire social network. Indeed Alexis Madrigal, in a recent article in *The Atlantic*, describes such private social communications, like emails, as 'dark social' and estimates that 69% of social referrals come from dark social, whereas 20% come from Facebook. These figures suggest that social networks are merely the very visible tip of a might iceberg of digital communications – this has implications for the sort of transactions made with social networks. According to Madrigal:

'We're not giving our personal data in exchange for the ability to share links with friends. Massive numbers of people -- a larger set than exists on any social network -- already do that outside the social networks. Rather, we're exchanging our personal data in exchange for the ability to publish and archive a record of our sharing.'

What does it all mean?

The role of email clearly has practical implications for businesses. Just as direct mail and television are still huge channels for marketing communications, so is email despite claims of its demise. Most consumers prefer it as a means for getting in touch and for being contacted by businesses, but this doesn't

mean it's heading the way of postal mail, which is almost uniquely used for direct marketing and 'official' purposes – though it is probably being used less frequently as a social tool than it was in the past due to social media's proliferation, it still has a social role to play, given its perceived levels of privacy (and its convenience as a smartphone application). Its popularity will remain strong into 2013 and beyond as privacy becomes a bigger issue on consumers' radars. Marketers, then, have to consider then what digital channel will be most appropriate depending on the type of contact they want with the consumer, the audience segment and the content of their message. Social networks are still important in B2C communications relationship (just look at customer complaints that have gone viral), but given people's preference for the more private email, marketers would be wise to await a customer's consent on a social network.

This Trajectory is driven by data and thinking from Trajectory's Global Foresight service (TGF) which covers 20 countries. The service provides analysis on the trends driving consumer and citizen behaviour - what they are, why they are important and where they are heading. All of the content is supported by research amongst over 40,000 people per annum.

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