Digital marketing is a rapidly growing market. Recent reports from eMarketer have predicted that this year digital marketing budgets will reach $39.5 billion in the US, a figure higher than that predicted for more traditional marketing channels (forecasted at $33.8 billion). The multiple channels marketers can use to engage with consumers - from SMS, Facebook, email to Twitter - make the digital offering an accessible, affordable and attractive proposition.

However, as the levels of investment in this space rise, so do the numbers of promotional messages reaching consumers across all of these channels. The massive inflation of global advertising impressions over any digital device - up from 172 billion in 1996 to over 5 trillion today - have decimated click through rates from an average of 7% in 1996 to less than 0.1% today. Consumers seem to be reaching a point of saturation.

The remedy to this bombardment mostly comes in the form of targeted advertising based on mining consumer data. People however are becoming increasingly protective of their personal data and willing to be proactive in punishing companies that violate their trust.

In this landscape, companies must consider how they can increase their share of voice in an environment where consumers are bombarded with marketing communications, without invading their private data.

We commissioned the 2012 Digital Advertising Attitudes Report as the secondary edition to our 2011 research. Given the developments in the digital environment, we want to better understand the evolving behaviour and attitudes of digitally empowered consumers and to discover which marketing methods, channels and devices elicit the most positive responses from them.

We hope that the results will promote a clearer understanding of consumer trends and deliver useful insights on how best to communicate with consumers within a crowded and converged digital context.

Marco Veremis, Chairman, Upstream
More than 5 trillion ad impressions per year frustrate consumers and escalating use of personal data worries them.

Upstream solves this problem of saturation vs. invasive targeting with its unique technology.

Our marketing technology platform, MCS, processes big data, provides profound analytics in real time and uses machine learning algorithms to improve consumer purchase rates by 100% on average, adding more than $500 million to our clients’ revenues in 40 countries.

24 billion marketing messages have been exchanged through MCS with hundreds of millions of consumers in 23 languages. We’ve built the strongest knowledge base in the industry and the ability to drive better content, context and real-time adjustments that result in more convincing sales messages.

We offer global coverage with offices in London, Redwood City, Rio de Janeiro, Singapore, Dubai, Athens, Bucharest and Rome.
The following report is based on an independent poll of 2,054 UK and 2,105 US adults, conducted by YouGov. The results show a strong indication that the majority of consumers surveyed feel they are reaching a marketing saturation point. The data reveals signs of digital bombardment, with two thirds (66 per cent) of adults in the UK and US saying they receive too many promotions and are exposed to too many adverts.

The research also investigates the consequences of this digital bombardment and finds that the most common response from consumers following excessive promotions is to switch off from the brand in question. Approximately two-thirds of respondents across both regions stated that they would unsubscribe from a brand’s promotions if they thought the messages they were receiving were too frequent. The message back to marketers is to speak less and to take an approach centered on quality rather than quantity, in digital campaigns.

The research also shows consumers to be evermore digitally empowered, using a range of digital devices to access multiple digital channels. In fact, the data indicates that a multi-device era has arrived, with 80 per cent of US and 77 per cent of UK consumers using more than one device to view electronic messages. Additionally, text-based promotions over different channels – SMS promotions (52 per cent), Email marketing (42 per cent) and Ads in mobile apps (37 per cent), have been identified as the preferred method of advertising communication by consumers.

The report concludes that businesses need to consider time, location and personalisation to optimise marketing engagement. In an age of excessive digital promotions, to be heard above the marketing clamour, brands must tailor their messages to their audience. Around a quarter of the consumers questioned would be more likely to respond to promotional messages tailored to their interests and similarly, 21 per cent in both countries would be more inclined to respond if the message was contextually relevant to what they were doing. However, none of the above would be effective if the relevant data were not voluntarily provided, and therefore perceived to be a violation of consumers’ privacy.

Investigating domains like the very content of the message, or game-like mechanics, where effectiveness in cut through is achieved without solely relying on mining personal data, should become a priority.

In conclusion, the research indicates that ensuring marketing messages are relevant, succinct and engaging should be at the crux of any digital marketing campaign.
part 1
DIGITAL BOMBARDMENT
**1.1 CONSUMER VIEWS ON DIGITAL MARKETING SATURATION**

**Total audience breakdown:** Many consumers feel they are reaching a marketing saturation point with two thirds (66 per cent) of adults in the UK and the same percentage in the US reporting that they receive too many promotions and are exposed to too many adverts.

In fact, only 2 per cent of US consumers and 1 per cent of UK consumers believe they are subjected to too few promotional/advertising messages. Such results urge businesses to decrease the frequency of their marketing communications.

Fig 1: Which ONE of the following statements BEST reflects how you feel about the total amount of advertising and promotions you currently receive via digital channels (e.g. email/ SMS/ websites/ apps etc.)?

**Age group breakdown:** The data reveals that the age groups which feel most digitally bombarded by advertising within both the US and UK are the older communities (age 55+). The results show that 74 per cent of UK adults in this category feel they are subjected to excessive numbers of promotions, showing a striking similarity to the responses from US respondents within this age group, where 75 per cent agreed with this statement.

59 per cent of UK young adults (18 -34 year olds) feel digitally bombarded, a trend that is mirrored in the US where 44 per cent of consumers within this age bracket feel the same way.

**Social grade breakdown:** Particularly in the UK, more affluent consumers feel more bombarded: 70 per cent of ABC1 consumers say they are subjected to too much advertising in contrast to 62 per cent of C2DE consumers.
Fig 2: Which ONE of the following statements BEST reflects how you feel about the total amount of advertising and promotions you currently receive via digital channels (e.g. email/ SMS/ websites/apps etc.)?

Total audience breakdown: The research findings have shown us that 69 per cent of adults in both regions are happy to receive marketing messages via digital channels from brands they are interested in. This indicates that consumers are not generally dismissive of digital marketing and are happy in principle to receive messages, understanding that it can be useful when used in a limited fashion.

However, in light of the current levels of digital marketing communications and the negative responses they prompt, how often is too often when contacting consumers? The results indicate that in most cases, consumers ask to be targeted once a month or less with promotional messages, across all digital channels.

Fig 3: Approximately how often, if at all, do you think it is appropriate for a company that you have subscribed to/are interested in to send you advertising and promotional messages via digital channels?

1.2 ACCEPTABLE LEVELS OF CONSUMER ENGAGEMENT
23 per cent of consumers both in the UK and the US never want to be targeted by companies with advertising and promotional messages. No UK consumers like to be targeted more than once a day, however 2 per cent of US consumers believe this to be an acceptable rate.

**Age breakdown:** Around one in five (20 per cent) of 18-24-year-old UK and US consumers find it appropriate for companies they are interested in to target them once a week.

**Total audience breakdown:** The research has found that digital bombardment prompts consumers to switch off from the brand in question, with two thirds of consumers across the UK and US stating they would unsubscribe from a brand’s promotions if they thought the messages they were receiving were too frequent.

Following this, close to a third (32 per cent) of UK consumers and 28 per cent of US respondents answered that they would be less likely to ever respond positively to a message from the brand in question if they felt that they were being bombarded with promotional messages, even if they had previously shown interest or subscribed to them.

Perhaps most worrying of all is that consumers are becoming increasingly turned off by digital advertising, to the point of damage in the relationship between businesses and consumers. In fact, 27 per cent of UK and 20 per cent of US consumers said that too frequent advertising or promotional messages would result in them not using the product of the brand in question at all. 10 per cent of UK and 11 per cent of US consumers would go a step further and use social media such as Facebook or Twitter to complain about it online. Only 1 per cent of UK and US consumers say excessive messages cause them to use the related products more often.

**Fig 4:** A company that you have subscribed to/ are interested in was sending you advertising and promotional messages that you consider as too frequent. Which, if any, of the following reflects how you would react?
**Age breakdown:** Young people (18-24) in both regions are less likely to use official customer services channels to complain about excessive advertising. Only 9 per cent of consumers in this age bracket surveyed in both countries would do so. However, this group of young consumers will use other channels to complain about being overloaded with promotions from brands. 18 per cent in the UK and 14 per cent in the US would use social media platforms such as Twitter or Facebook to do so. In a context where peer reviews and social networks provide increasingly trusted sources of information, this consequence could be potentially very harmful to businesses.

In contrast, silver surfers in both the UK and US are unlikely to complain about brands via social networks, with just 4 per cent of UK and 7 per cent of US consumers surveyed in the 55+ age bracket doing so.

**Gender breakdown:** 24 per cent of US males are much more likely to stop using a product or service following excessive promotional messages. 32 per cent of them are also much less likely to respond positively to a brand in the future if they felt bombarded by advertising. In comparison, only 16 per cent of female respondents in the US said they would stop using a product or service, while 24 per cent stated they would be less inclined to respond positively following excessive marketing communications.

However, a higher proportion of UK males (32 per cent) would stop using a product or service in face of too many marketing interactions, while 22 per cent of UK women provided the same response. Correspondingly, 35 per cent of men in the UK are much less likely to respond positively to a brand in future interactions, compared to 29 per cent of women.
part 2

CROSS CHANNEL CONSUMER
2.1.1 CONSUMER ATTITUDES TO DIGITAL DEVICE MARKETING

**Total audience breakdown:** As the monetization of the mobile channel increases, the data indicates that consumers are feeling increasingly frustrated with the rising numbers of messages reaching them via their mobile devices. The data shows that 64 per cent of UK consumers and 67 per cent in the US find it most unacceptable to receive promotional messages over their phones. This provides a strong warning signal to brands to take extra care when launching promotions over the mobile channel, as consumers reveal that excessive unwanted advertising on smartphones is the biggest turn off.

![Figure 5: Which ONE of the following electronic devices would you find it MOST unacceptable to receive unwanted advertising on?](image)

However, despite this apparent backlash against mobile marketing, the data has also found that consumers are increasingly less conscious as to which platform they receive digital promotions over, with more than a third in the UK (36 per cent) and 29 per cent of US respondents stating they don’t know or don’t mind which device they are contacted through. 44 per cent of consumers in the US and 34 per cent in the UK prefer to receive marketing promotions on their PC, while 24 per cent of consumers in the US and 23 per cent in the UK prefer their laptop.

These results support the fact that the more personal a device is to the consumer, the more unacceptable it is to market over these media. The results reveal this problem to be more pronounced in the mobile space. Only 3 per cent of consumers in the US and 5 per cent in the UK prefer to receive marketing communications on their smartphone.
**2.1.2 CONSUMER INTERACTION WITH MOBILE BANNERS**

**Total audience breakdown:** The results reveal consumers to be increasingly frustrated by brands’ use of mobile banner ads. In fact, 55 per cent of UK consumers claimed to find them irritating in 2012, compared to only 32 per cent in 2011. In the US, this number reached 47 per cent.

The effectiveness of this type of advertising can be called into question, given that only 1 per cent of UK and US respondents stated that they have followed up on banner ads they saw on their mobile.

**Age breakdown:** Young consumers across the UK and US get more irritated by banner ads than older consumers. 67 per cent of UK 18-24-year-olds claim to be infuriated by them, compared to 46 per cent of those aged over 55. In the US, 54 per cent of young people expressed a similar frustration, compared to 40 per cent of those aged over 55.

**Gender breakdown:** It is apparent that mobile banner advertising makes men more irate than women. Higher percentages of UK and US males reported being angered by them (59 per cent in the UK, 49 per cent in the US). Still representing over half of respondents, 52 per cent of UK females reported being annoyed by mobile banners, while this number reached 45 per cent for female US respondents.
Total audience breakdown: When looking at what achieves successful cut through, the research has been able to identify that 26 per cent of consumers both in the US and the UK say they are more likely to respond to messages tailored to personal interests, while 22 per cent say they are more likely to respond to promotions that are specific to their location.

Ensuring that messages are contextually relevant is also important, as the data shows that such messages are likely to generate positive responses from 21 per cent of respondents. All of these results reveal that businesses should consider time, location, personalisation and phrasing to optimise marketing engagement.

It should be duly noted, however, that interests, location, personalisation and contextual relevance are relatively harmless data, voluntarily provided by the consumers themselves. It is not coincidental that truly sensitive private data, such as biographical or life-stage information does not show up in consumers’ responses.

Fig 8: Which, if any, of the following would make you MORE likely to respond positively to marketing messages?

![Bar chart showing responses from UK and US]
With regards to the most effective marketing channels, the research has found that 37 per cent of consumers in the US and 31 per cent in the UK prefer a detailed email. At an impressive second place, we find 14 per cent of consumers in the US and 15 per cent in the UK preferring a short text-only message, like a Tweet, a Facebook message, or an SMS.

Despite the promise of new marketing technologies such as QR codes and Augmented Reality, these marketing techniques are failing to make their mark with consumers. Only 8 per cent of US consumers and 10 per cent of UK consumers respond positively to QR codes and a mere 3 per cent of US consumers and 2 per cent of UK consumers said they would respond positively to Augmented Reality messages.

Fig 9: Which, if any, of the following types of message would you be likely to respond positively to if you received these adverts or promotions?

These results are indicative of the rising popularity of the ubiquitous, short text-based message as a very powerful carrier of digital sales propositions.
Total audience breakdown: The research results indicate that the multi-device era has clearly arrived. Currently, 63 per cent of UK consumers check email or browse the internet on more than one device, a figure that stands slightly higher in the US, at 65 per cent.

In fact, the results show consumers increasingly using multiple devices for many different activities. Almost half of US consumers (46 per cent) and 42 per cent of UK consumers use more than one device to visit social media sites. Furthermore, 43 per cent of US consumers use multiple devices to play games.

Age breakdown: Younger UK and US consumers are the early adopters of the multi-device society. Currently, 74 per cent of UK consumers between the ages of 18 and 35 surf the internet on more than one device, with a similar figure in the US for respondents in the same age bracket (71 per cent).

Fig 10: Which, if any, of the following do you ever do on more than one type of device?

Only 20 per cent of US consumers and 23 per cent in the UK use just one device to view electronic messages. These results suggest to brands and businesses that they should focus less on siloed digital channels when it comes to marketing engagement.
One of the definitive conclusions we can draw from the research is that consumers have reached a point of saturation in relation to digital marketing communications. Two-thirds of consumers already claim to be exposed to too many adverts or promotions and this figure is only likely to increase, given both the multiple channels and devices leveraged by advertisers and a new breed of mobile consumer.

The data initially presents this as a massive problem for digital marketing, revealing the damaging consequences of digital bombardment. As the research shows, 66 per cent of consumers in the US and 65 per cent in the UK would unsubscribe from a brand’s promotions if they thought the messages they were receiving were too frequent. Furthermore, 28 per cent of consumers in the US and 37 per cent in the UK would respond negatively to future messages from that brand. These results go a long way in explaining why there has been a dramatic decrease to the click-through rates we currently see. Click-through figures have dropped from 7 per cent in 1996, to less than 0.1 per cent today.

The research therefore prompts us to consider the devices consumers would actually like to receive marketing communications on and which of those devices are the most effective. It becomes apparent that devices such as PCs are the preferred choice for consumers in both regions (US 44 per cent, UK 34 per cent), with laptops following closely at second place. It must be observed that only 3 per cent of consumers in the US and 5 per cent in the UK prefer their smartphone.

The fact that 67 per cent of consumers in the US and 64 per cent in the UK say they are turned off by unwanted advertising on their mobile, indicates that consumers have different tolerance levels on different devices. This signals that the more personal a device is to the consumer, the more unacceptable it is to market over these media.

The results have also yielded some useful insight into the most effective channels for marketing. Detailed emails are the preferred consumer channel for receiving offers in both regions, followed by short text-only messages (e.g. Tweets/Facebook messages). This means that text-based communications are more favoured than new marketing technologies such as QR codes or Augmented Reality.

Furthermore, in an environment of excessive digital promotions, the drive for businesses to create a compelling proposition which achieves true cut through, should carefully consider factors like time, location, and personalisation when engaging with consumers. Around a quarter of UK and US consumers would be more likely to respond to promotional messages tailored to their interests and similarly, 21 per cent in both countries would be more inclined to respond if the message was contextually relevant to what they were doing. The importance of making communications relevant to each individual cannot be understated, as long as this relevance does not constitute a violation of the consumer’s privacy. People do not mind receiving tailored messages based on harmless information that they themselves have provided, but it is quite indicative that such information, as it shows up in their answers, is never truly personal, like biographical or life-stage data. Domains where effectiveness in cut through is achieved without solely relying on mining personal data, like the very content of the message, or game-like mechanics, should be more rigorously investigated.

The results also show that on any given day, consumers access their favourite communication channels through various devices, providing a strong indication that device-specific marketing is becoming less relevant. Most consumers across the UK and US use more than one device to check email, browse the internet and visit social media sites. It is telling that 29 per cent of US consumers and 36 per cent of UK consumers don’t mind or even know which platform they prefer to receive promotional messages on.
The research shows that brands, businesses and digital marketers alike must make a shift in attitude when targeting consumers over digital platforms and devices. The insight provided by the results is that a strategy based on marketing in volume is no longer effective and can in fact be potentially harmful. Instead, marketers should embark on a quest for effectiveness if they are to successfully engage this new type of device-neutral consumer.

The key takeaway is that in an age of marketing saturation, any digital marketing communication must be contextualised, relevant and engaging to consumers, in order to encourage a response. Specialised device marketers will find themselves needing to adapt to new mobile consumers who interchange between channels and devices seamlessly. Given this convergence between different devices, marketers who remain entrenched in one space alone, who do not redefine themselves to address real consumer use of digital channels, will most likely become obsolete.

The true challenge is to develop marketing technologies that will effectively drive click through and consumer purchase rates, while simultaneously managing not to bombard consumers or invade their privacy.
This survey has been conducted using an online interview to administered members of the YouGov Plc GB panel of 350,000+ individuals who have agreed to take part in surveys. An email was sent to panellists selected at random from the base sample according to the sample definition, inviting them to take part in the survey and providing a link to the survey. (The sample definition could be "GB adult population" or a subset such as "GB adult females"). YouGov Plc normally achieves a response rate of between 35% and 50% to surveys however this does vary dependent upon the subject matter, complexity and length of the questionnaire. The responding sample is weighted to the profile of the sample definition to provide a representative reporting sample. The profile is normally derived from census data or, if not available from the census, from industry accepted data.

This survey has been conducted using an online interview to administered members of the YouGov Plc USA panel of just over 1 million individuals who have agreed to take part in surveys. An email was sent to panellists selected at random from the base sample according to the sample definition, inviting them to take part in the survey and providing a link to the survey. (The sample definition could be "USA adult population" or a subset such as "USA adult females"). YouGov Plc normally achieves a response rate of between 35% and 50% to surveys however this does vary dependent upon the subject matter, complexity and length of the questionnaire. The responding sample is weighted to the profile of the sample definition to provide a representative reporting sample. The profile is normally derived from census data or, if not available from the census, from industry accepted data.