



# Accountants' Email Marketing Report 2024

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**33%**

Never send marketing emails

**60%**

Say email is important or very important to their strategy

**33%**

Say “knowing where to start” is their biggest challenge

Our 2024 survey of 116 accounting firms reveals that while email marketing is valued, many struggle with implementing a consistent and effective strategy.

Only a third send emails regularly, with content mostly focused on updates and client engagement.

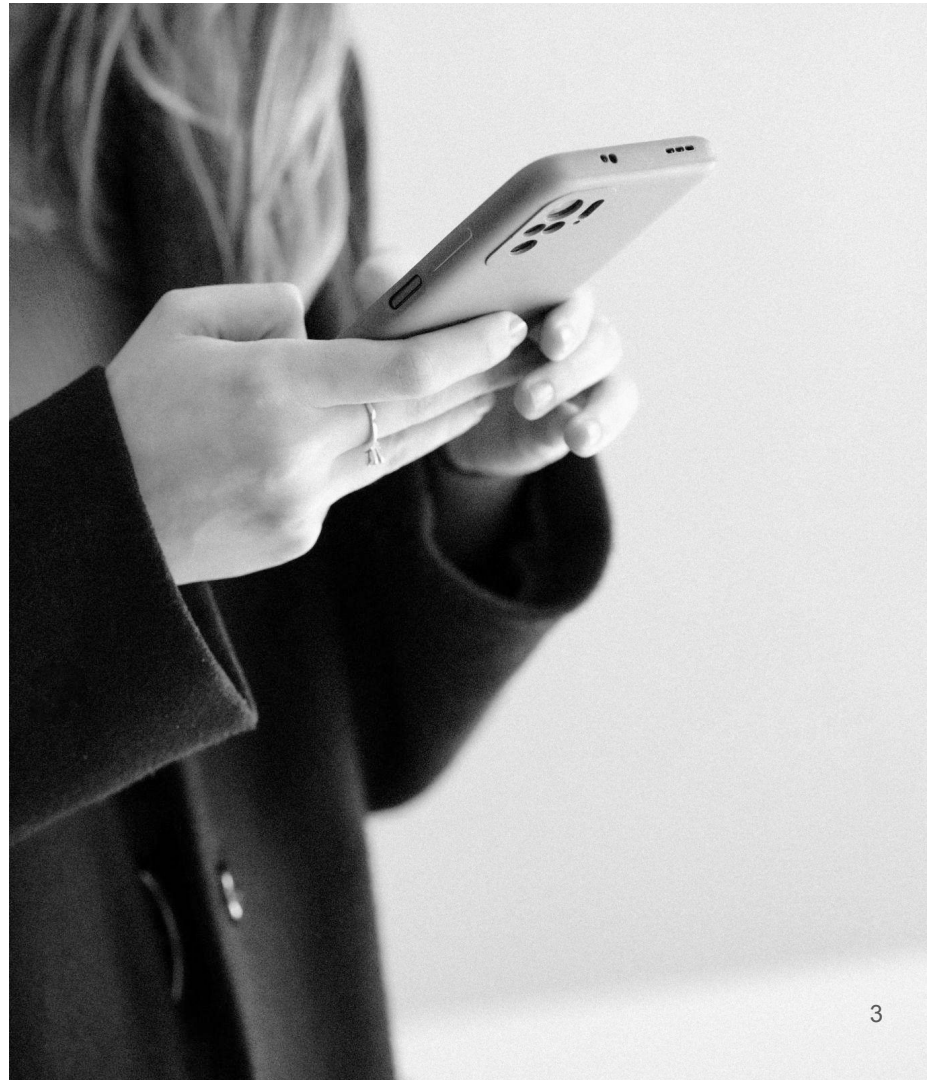
Major challenges include knowing where to start, creating engaging content, and growing email lists. The data suggests firms can benefit from increased automation, better tools and focused content to enhance client communication and drive growth.

## Introduction

Email marketing is a critical tool for accounting firms: a direct channel to communicate with clients and prospects.

This survey was conducted to gain insights into how accounting firms approach email marketing, the obstacles they face and opportunities for improvement.

With client engagement increasingly digital, email marketing is an invaluable resource for retention, client marketing and nurturing leads and prospects.

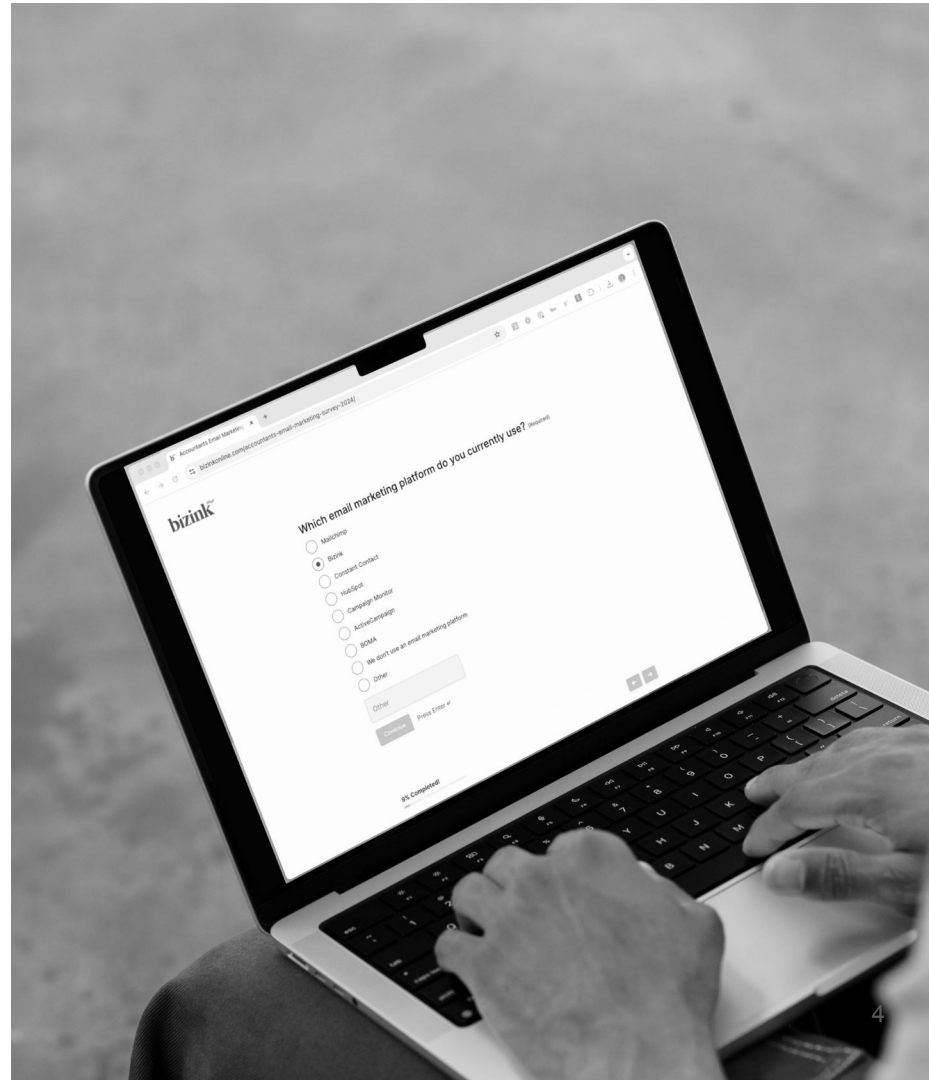


## Methodology

The report is based on responses from 116 accounting firms from all over the world.

The survey collected quantitative and qualitative data on email marketing practices, including email frequency, primary goals, platforms used, content shared, and automation.

The analysis offers a comprehensive view of how firms are currently using email marketing, as well as the main barriers to harnessing its potential.



# 01 Cadence and content



## How often do you send marketing emails to your clients?

The short answer to the question above is “rarely”.

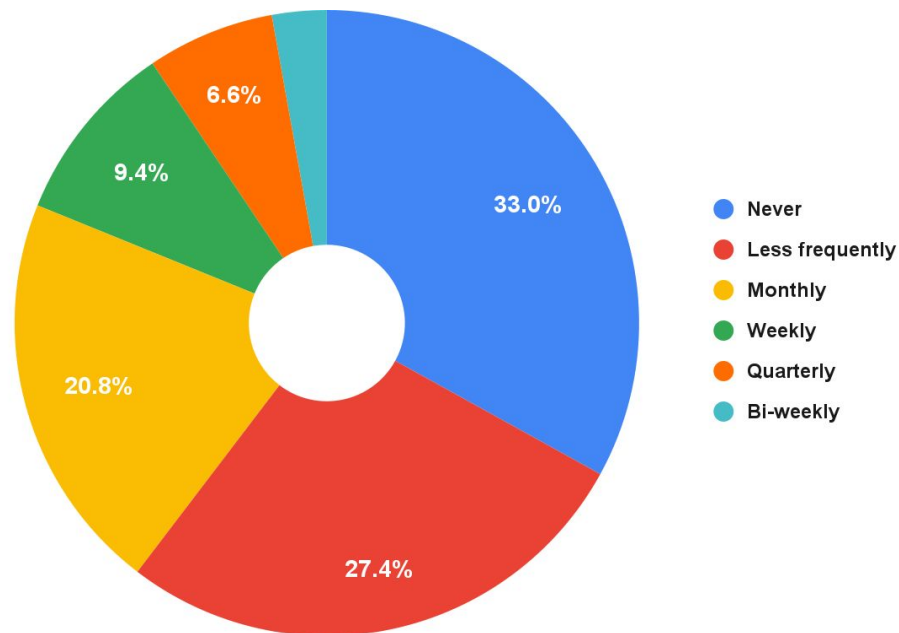
A third of firms never send marketing emails to clients and over a quarter send them less than once a quarter.

### Tip

Clients want more help from you. But many won't ask or “don't know what they don't know”.

Email is an ideal channel for cross and upselling as every business owner has an email address.

We recommend sending promotional emails monthly, segmenting your client list to target offers to the right people.



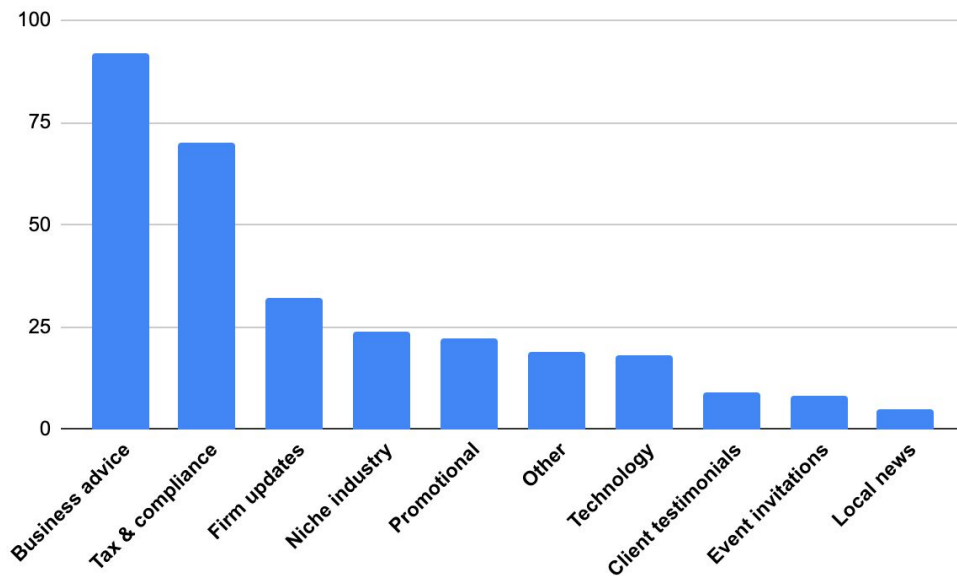
## What type of content do you most often include in your emails?

Business advice and tax compliance are the most common content types sent in emails. Unsurprising given these are the main services offered by accountants.

A fifth of firms send niche industry content. Focused content cuts through the noise and should be considered in your content plan.

Only a handful of firms send client testimonials. It may seem counterintuitive to send them to existing clients but it reinforces their decision to engage you.

Testimonials are an evergreen way to show value to prospects.



# 02 Audience





## What is your email list size?

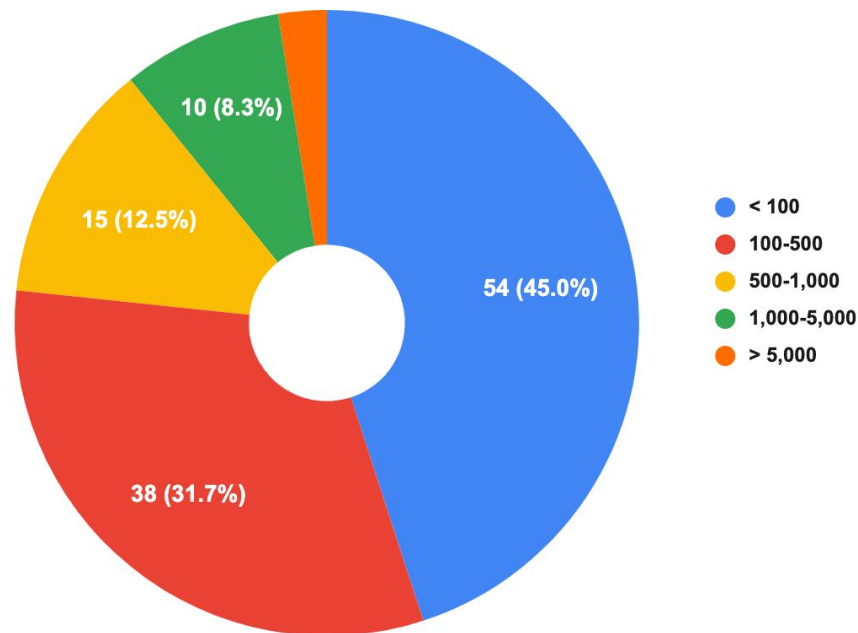
Quality trumps quantity with lists. Still, it is hard to get a marketing result with a list under 100 like 45% of the firms in the survey.

Likely, this is because most firms only have an email marketing list of clients. Only a handful of firms we speak to also maintain a prospect list.

### Tip

Being “top of mind” when a prospect is ready to engage an accountant is key and regular emails achieve this.

A targeted list such as from an industry niche will convert at a higher rate than a general list.



## Do you actively try and grow your email list?

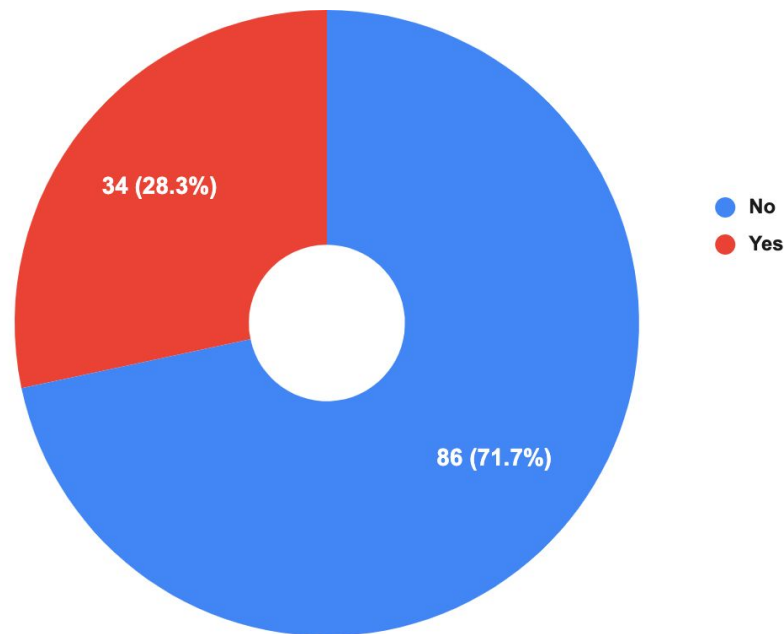
Every time you send marketing emails, people unsubscribe. If you're not actively growing your email list, you are shrinking it.

Over 70% are not so it's a problem and opportunity.

### Tip

Why does every big brand and vendor want your email address? Because email works as a sales channel.

The key to growing your list is a value exchange: what is a high-value piece of content you can giveaway to gain subscribers?



## How often do you clean and update your email list?

What is a “clean” email list?

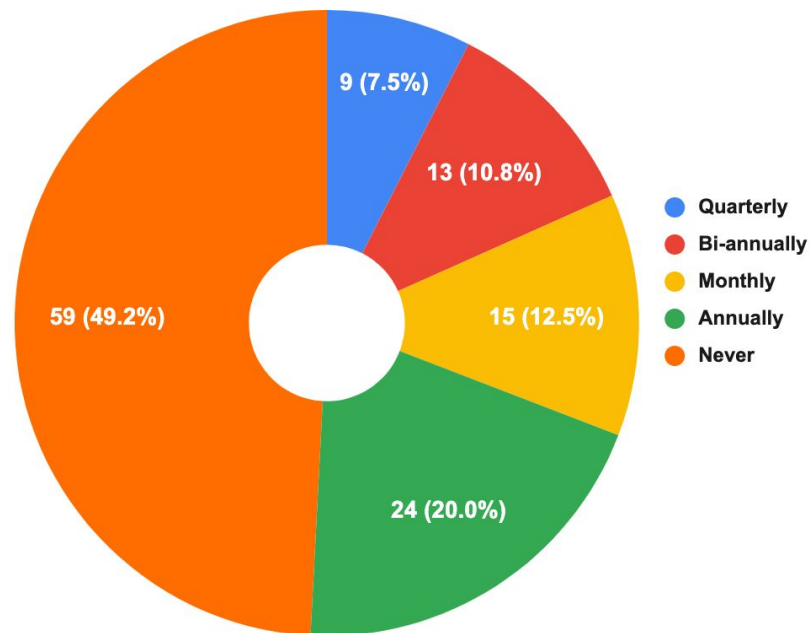
- All subscribers gave permission
- No bounced email addresses
- Unengaged subscribers removed

Almost half of firms never clean their list. It should be constant process because a clean list means:

- No SPAM or compliance issues
- Higher deliverability
- Better engagement
- Lower subscription costs

### Tip

Get explicit permission from every subscriber. Remove bounced email addresses and anyone who did not open your last 10 emails.



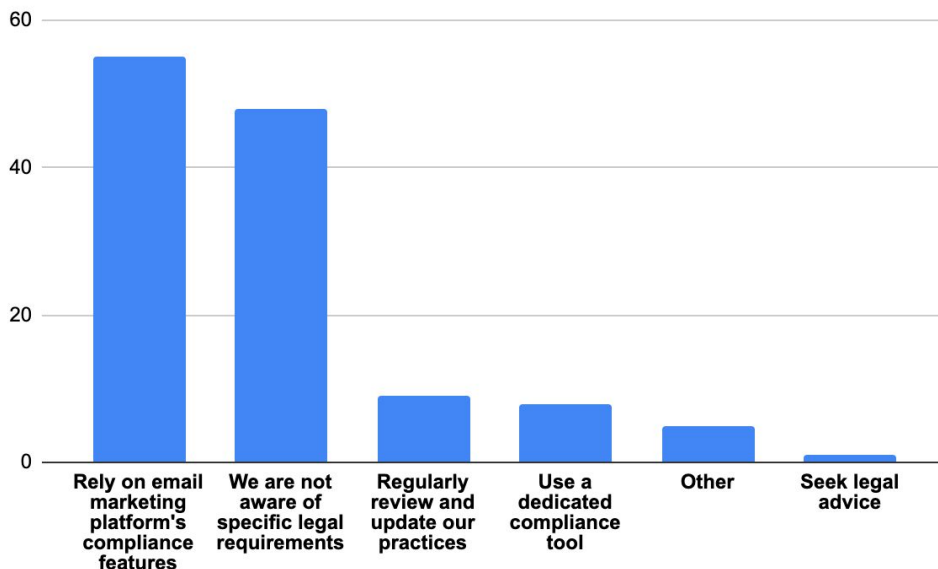
## How do you ensure your email marketing is legally compliant?

Most accountants are not trying to “Spam” anyone. But over 40% said, “We are not aware of specific legal requirements” regarding email marketing.

The laws regarding email sending and data-compliance vary globally. But the guiding principles are:

- Always have consent
- Easy to unsubscribe
- People have right to be forgotten
- People have right to their own data

Much of this is handled by popular email apps. But it's worth doing an occasional audit to ensure you are compliant.



# 03 Results



# What is your average open rate for email campaigns?

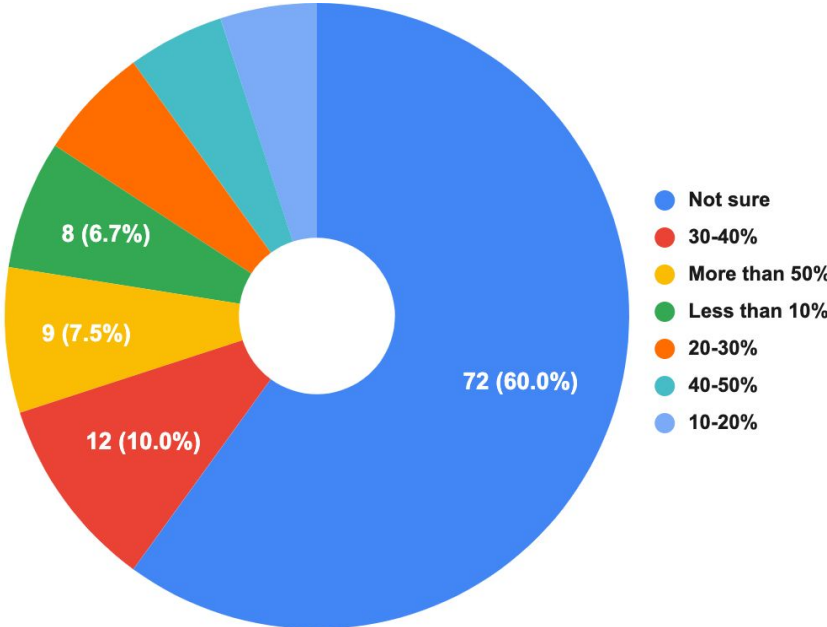
The key finding is that most accountants don't know what their email open rate is.

Most email apps will show open rate in campaign reports.

As a benchmark, Bizink sends millions of emails for accountants every year. The average open rate is just over 50%. Compare this to Mailchimp's data:

*"Our data shows that the highest average email open rate is 40.55 percent for government emails, while the lowest average email open rate is 27.34 percent for vitamin supplement emails."*

People open emails from accountants. This is why we rate it so highly as a marketing channel.



## What is your average click-through rate?

Click-through rate (CTR) is a measure of engagement being the number of people that clicked a link in your email.

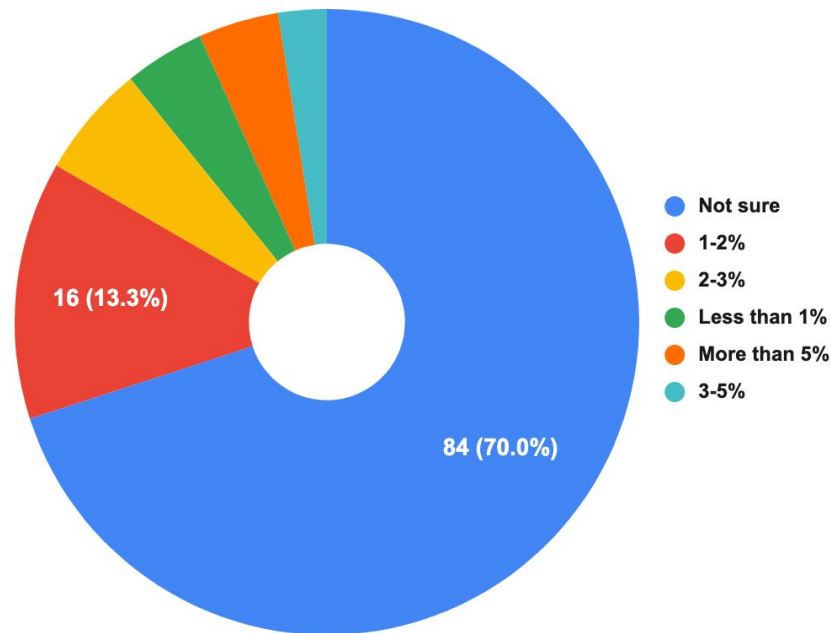
Most email apps will show click-through rate in campaign reports.

As benchmark, Bizink has found the CTR for clients to hover around 5% which compares well with Mailchimp's data:

*"The optimal CTR for an email marketing campaign is 2.66 percent, however it may range from 1-5 percent depending on the industry. The highest average CTR is 'government', with 4.58 percent."*

In short, people take action from emails sent by accountants.

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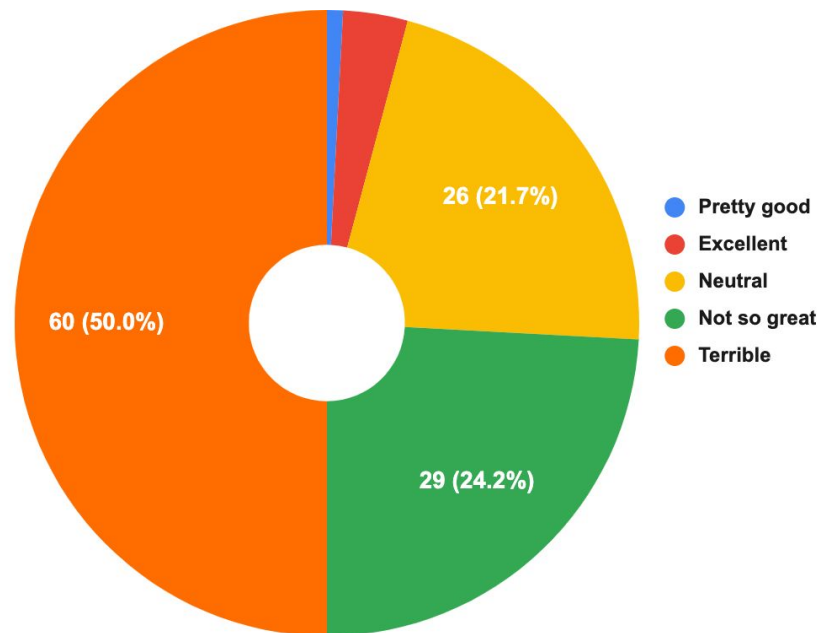
## How would you rate the email marketing efforts of your firm?

Half of the respondents rated their email marketing efforts as “terrible” and almost a quarter as “not so great”.

Only 4% marked themselves as above neutral.

We have found that accountants tend to score themselves low on their own marketing efforts. Perhaps a little harshly here.

Our summary is there is huge unrealised potential for firms in improving their email marketing game.





# 04 Tech and automation

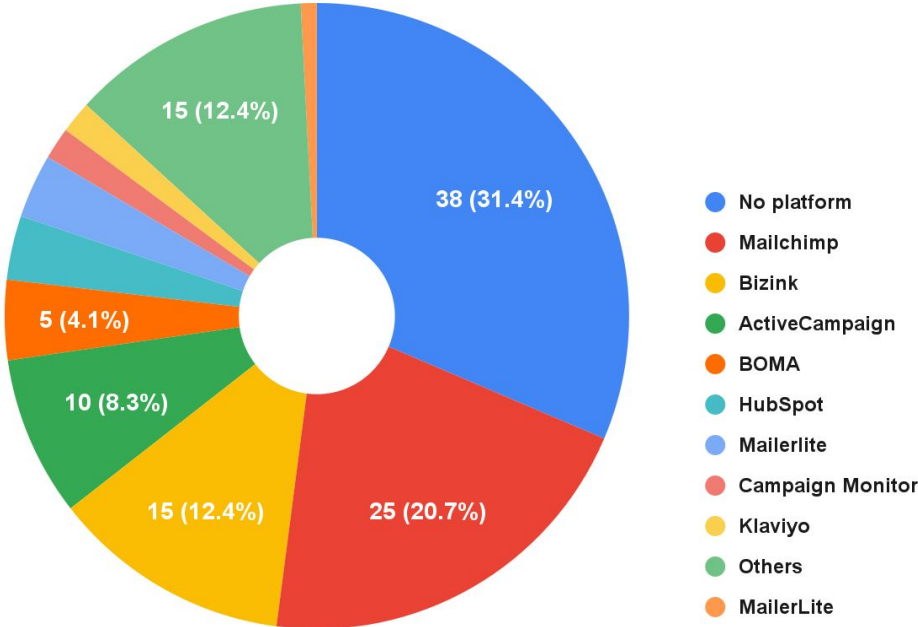


# Which email marketing platform do you currently use?

The most popular answer is “No platform” which hopefully correlates with the firms that never send marketing emails.

If they are using Outlook or Gmail that’s cumbersome at best and also not legally compliant for bulk-emailing.

A fifth of firms are using Mailchimp. This has always been a popular platform due to its free tier. Being bought by Intuit brings it further into the accounting world.



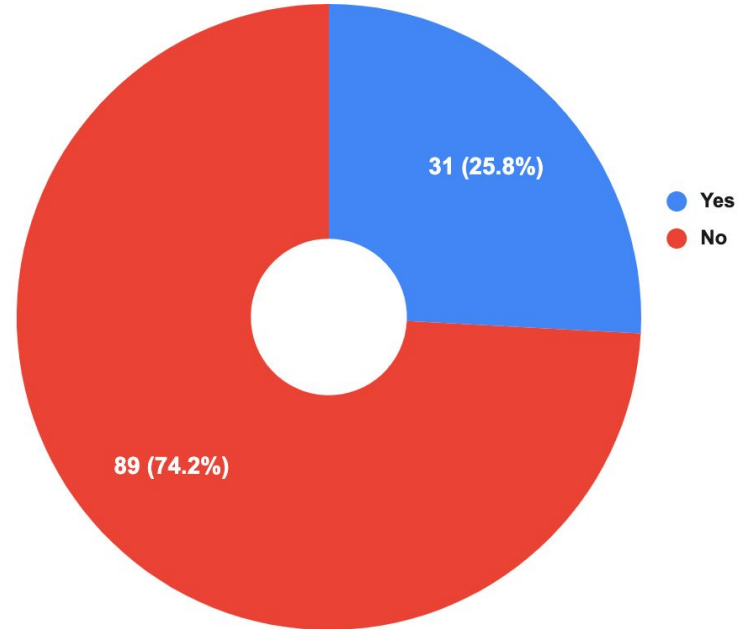
## Do you use any automation in your email marketing campaigns?

Almost three quarters of firms are missing out on email automation which is a feature of all leading email platforms.

### Tip

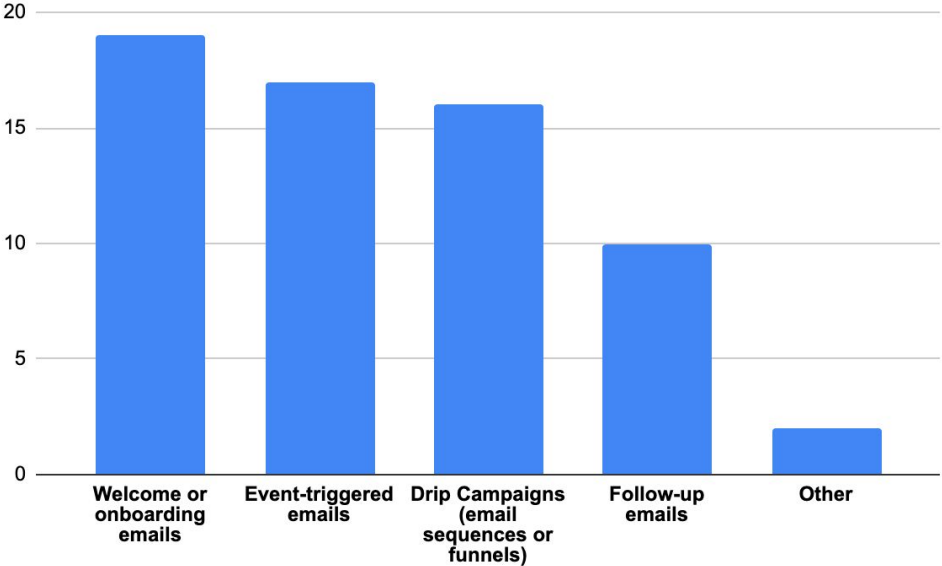
Three email automation use-cases:

1. Onboarding sequence of emails for new clients
  - Include how to get support, tech-stack logins, team intros
2. Welcome sequence of newsletter subscribers
  - Turn leads into prospects with past newsletters, testimonials and engaging content
3. Email course on a topic your ideal client would love
  - For example a "7-ways to get paid faster course for freelancers"



# What types of automation do you use?

Of the quarter of firms using email automation the use-cases were evenly split.



# 05 Goals and challenges



## What is your main email marketing goal or purpose?

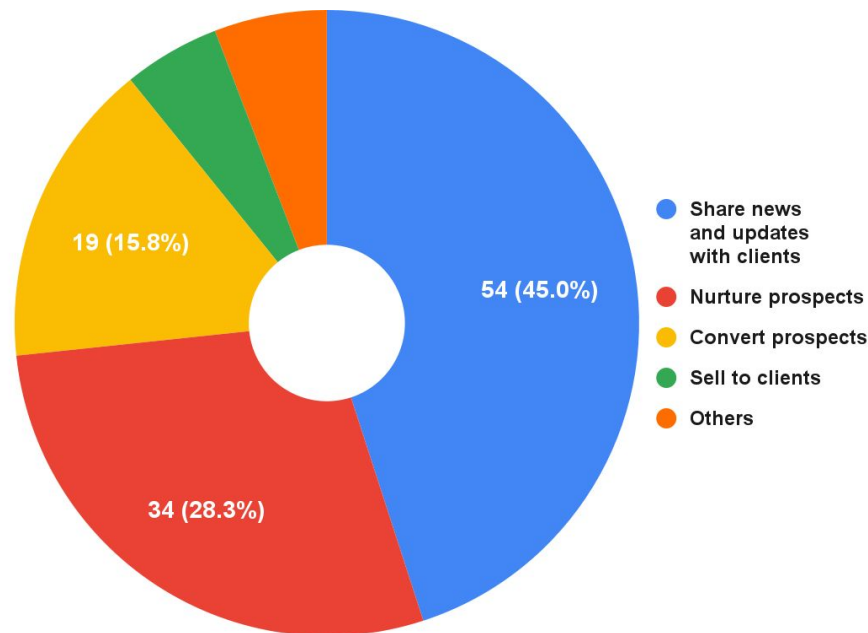
“Share news and updates with clients” was the top purpose for sending emails. No surprise here as the humble email newsletter is both popular and effective.

It’s good to see accountants value email as a marketing channel with just over half saying selling to clients or prospects was their main goal.

### Tip

Email marketing success comes from consistency and volume.

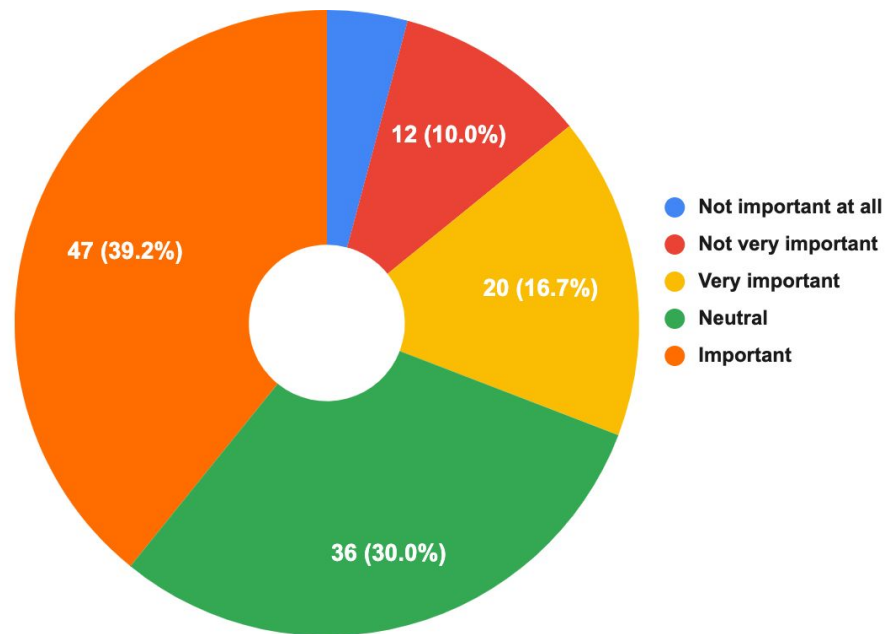
Send a mix of newsletters and promotional emails to clients and prospects and to see the best results.



## How important is email marketing is to your marketing strategy?

Well over half the accountants surveyed said email was either “important” or “very important” to their marketing strategy.

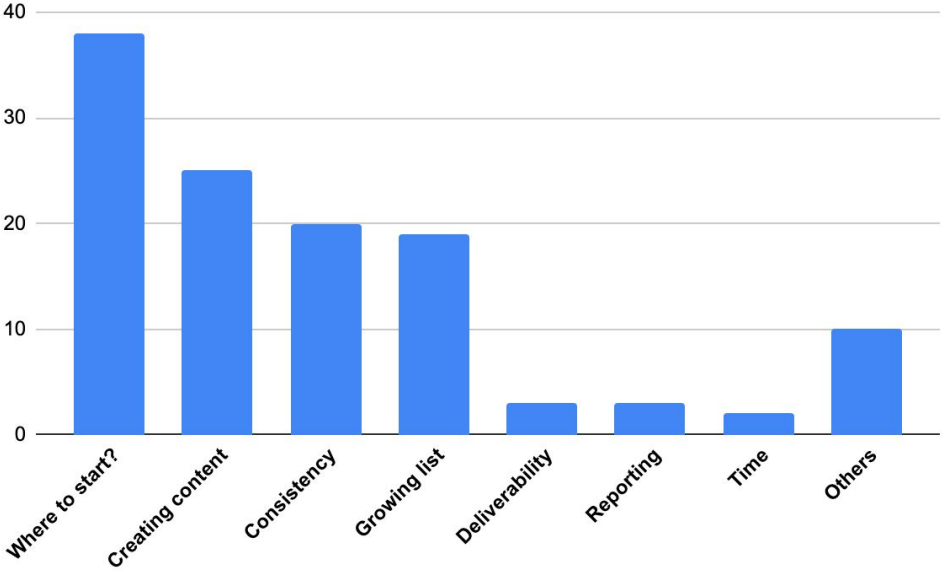
30% said they were neutral about its importance and only 15% felt it wasn’t important.



# What is the biggest challenge you face with email marketing?

A third of firms stated “Knowing where to start” as their biggest email marketing challenge.

Of those that have started, creating content, consistency and growing their list were the main challenges with only a few accountants facing other issues.



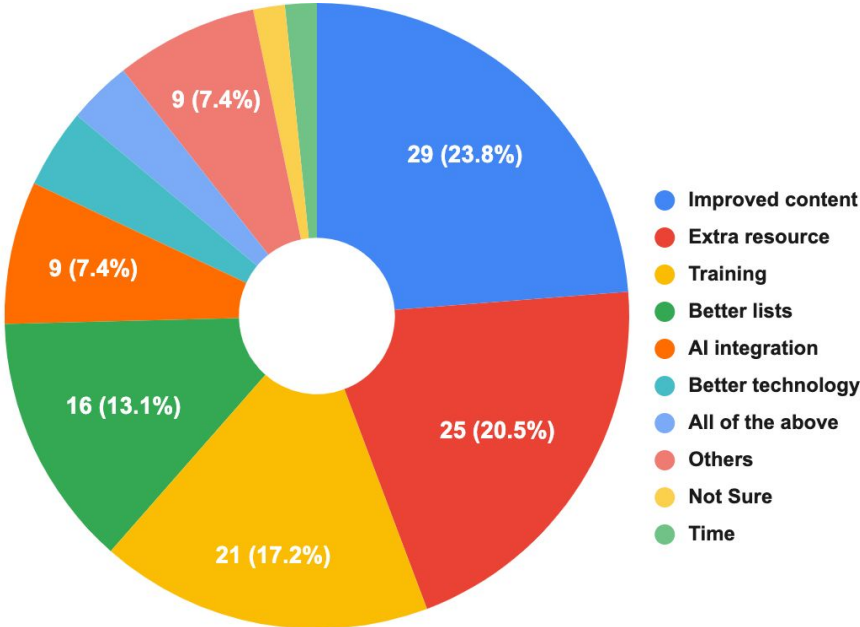


# What's one thing to take your email marketing to the next level?

This question has the widest distribution of responses across the whole survey.

Our simple summary would be: accountants need more email marketing support.

Which is what we plan to do!



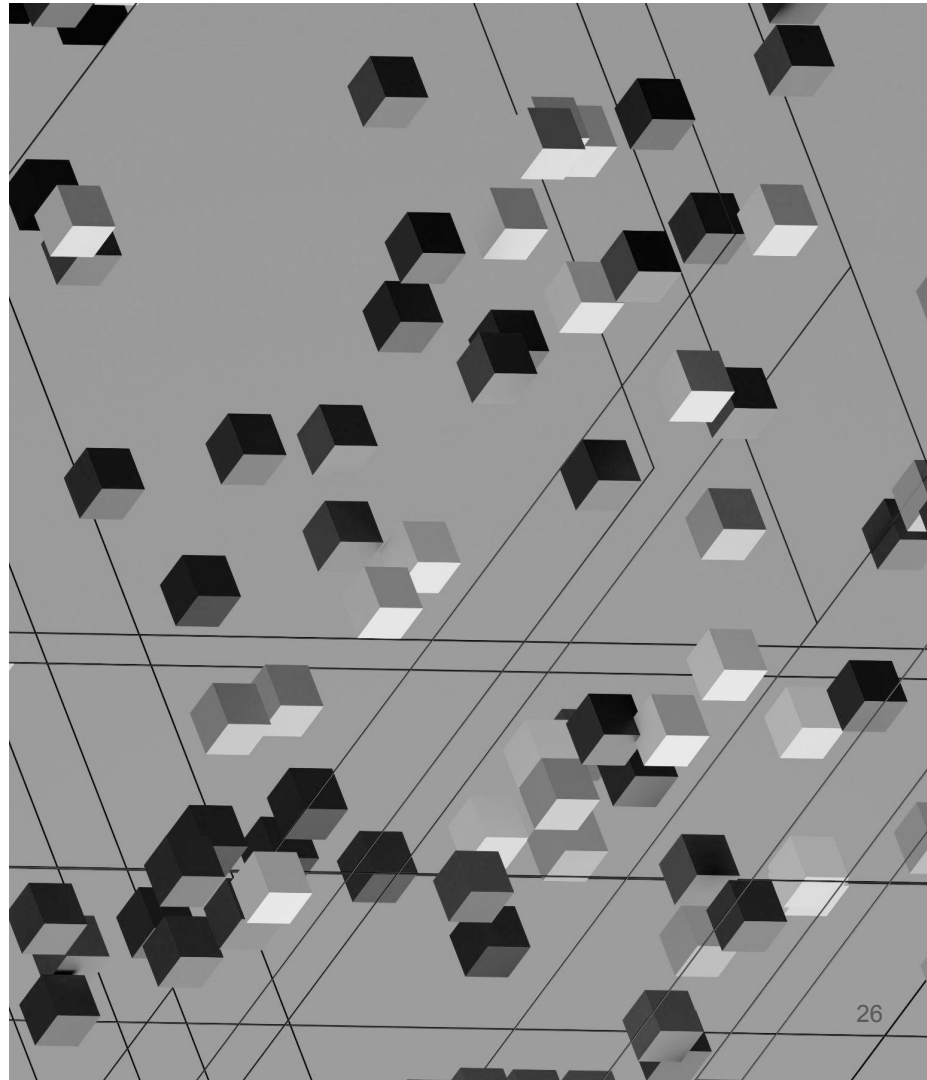
## Trends and observations

A significant number of firms (33%) never send marketing emails, indicating untapped potential.

Content is largely informational, with a focus on business advice and compliance updates. Promotional content is rare.

Many firms lack the tools or knowledge to effectively use email automation, which could help improve consistency and engagement.

Despite these challenges, over half of the respondents consider email marketing as important, suggesting a readiness for more strategic approaches.



## Recommendations

### Basic recommendations

Novice email marketer? Start here:

#### Use the right tech

Bulk emailing needs a proper app. Mailchimp is most popular or try [Bizink's Compass](#) for free.

#### Send more emails

Few firms send enough emails. What's enough? Here's our [recommended schedule](#).

#### Love your list

A growing email list is a high-value marketing asset. Don't eschew quality for quantity and remove unengaged subscribers for a "clean" list.

### Advanced recommendations

Level-up your email game with these tips:

#### Fly fish don't trawl

Segment your lists to target content and offers to the right people at the right time. Better results, less unsubscribes.

#### Niche content

A niche newsletter will vastly outperform "small business" content. Combine with the tip above for the high engagement.

#### Automate


Good email automation enhances human interaction not replaces it. Think sequences for client onboarding and lead nurturing.

## More email marketing resources

With Compass by Bizink you will grow referrals, retention and revenue with guided email marketing campaigns. No marketing skills needed.

 Bizink's email templates for accountants  
Tried-and-tested [email templates](#). Use in your favourite platform.

 Benchmarking tool  
Answer 16 quick questions and get a [personalised scorecard](#).

 **17** Email content calendar  
Suggested email cadence for accounting firms plus [ideas for campaigns](#).



Talk to a human about email?

**Let's chat!**

I'm Matt Wilkinson one of the founders of Bizink. Want to talk email, websites or digital marketing? Let's schedule a time.

## Want an email marketing platform built for accountants?

With Commpass by Bizink you will grow referrals, retention and revenue with guided email marketing campaigns. No marketing skills needed.



Proven email templates

Ask for referrals, cross-sell to clients, get Google reviews



Email newsletters

Content clients will love written for you



Email automation

Client onboarding and lead nurturing on auto-pilot



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Free for 90 days - no credit card needed.



# Thanks!

To everyone who took the time to complete this survey.

Also to our survey partners below. They are all awesome companies, helping accountants and I recommend you check them out.

