



Clackamas County

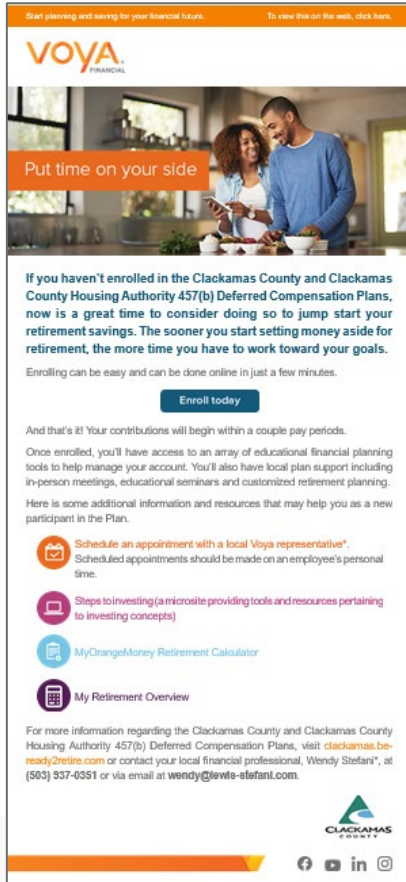
2024 COLA (Enroll/Save More) Campaign: campaign metric report



COLA email campaign

- Enrollment email: deployed 9/3/24
- Increase Deferral Amount email: deployed 9/13/24

Clackamas County – Enrollment email



September 3, 2024

Sent	Delivered	Total opens*
2162	2157	1111

*Total opens is cumulative.

Clackamas County – Enrollment

Deployment metrics

Date	Delivered	Unique opens		
		Total	Desktop	Mobile
9/3/23	2157	610 (28.3%)	595 (97.5%)	15 (2.5%)

Hyperlinks clicked

Click Activity	9/3/23
Plan enrollment information	15 / 610 (2.46%)
My Retirement Overview	9 / 610 (1.48%)
Schedule an appointment	5 / 610 (0.82%)
clackamas.beready2retire.com	4 / 610 (0.66%)
MyOrangeMoney calculator	4 / 610 (0.66%)
Steps to investing (microsite)	1 / 610 (0.16%)

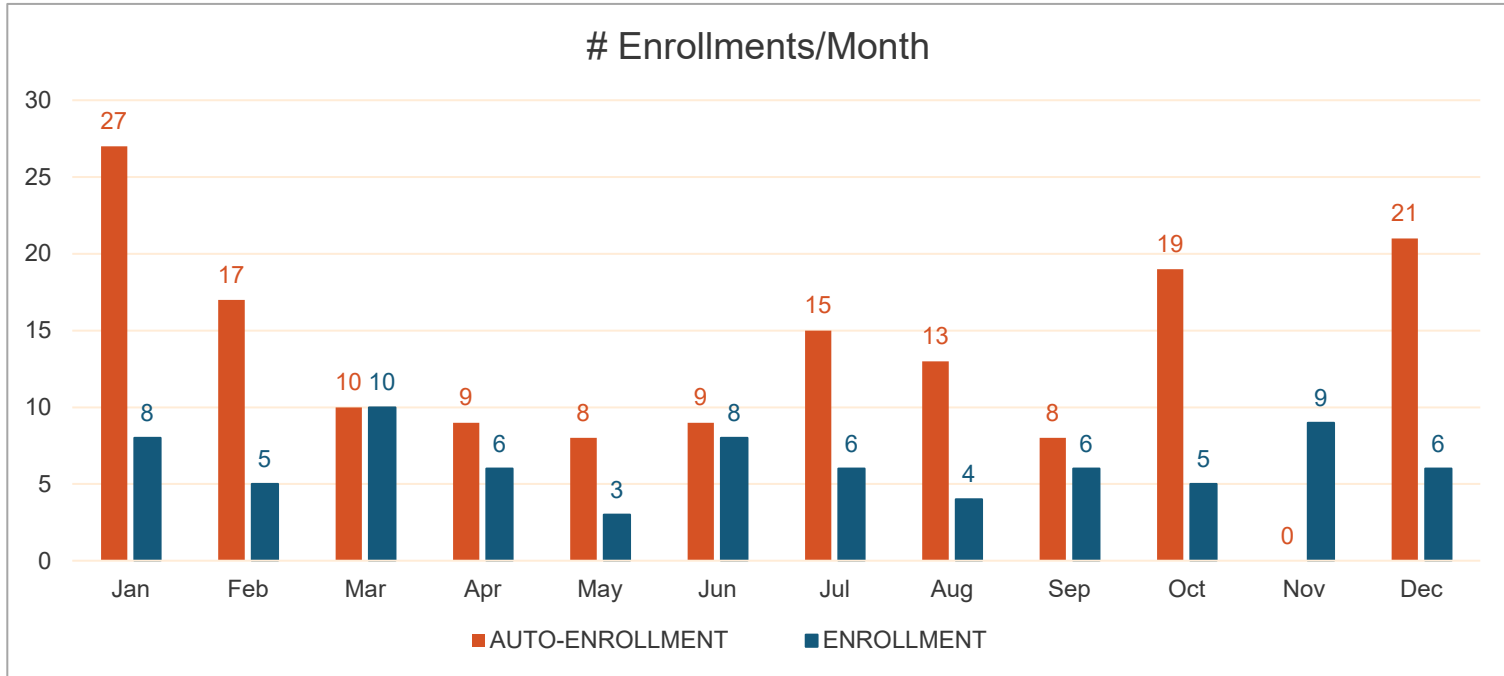
Average benchmarks (All industries) - open rate: 19.21%, click-through activity: 2.44%

Average benchmarks (Financial Services) - Unique open rate: 20.20%, click-through activity: 2.50%

Email Marketing Benchmarks for 2023:

<https://www.webfx.com/blog/marketing/email-marketing-benchmarks/>

Clackamas County – Plan metrics: Enrollment



Email deployment 1: 9/3/24

Clackamas County – Increase Deferral Amount

The screenshots show the following content:

- Age 20-29:** "Penny for your... retirement? You know the saying 'penny for your thoughts'? What if you put that penny towards your retirement savings instead? It's never too early to start saving. By investing early in your career, you'll benefit from the power of compounding and the potential benefits of tax-deferred growth and compounding of the same pennies per dollar aside and put time on your side. Any earnings your savings generate go back into your account with taxes, improving potential growth opportunities (taxes are due upon withdrawal)."
- Age 30-49:** "Penny for your... retirement? You know the saying 'penny for your thoughts'? What if you put that penny towards your retirement savings instead? Your day-to-day finances might include the costs of caring for aging relatives. However, it's important to plan for your own future. Getting ahead a few more pennies of every dollar could help you reach your retirement goal faster. Any earnings your savings generate go back into your account with taxes, improving potential growth opportunities (taxes are due upon withdrawal)."
- Age 50+:** "Penny for your... retirement? You know the saying 'penny for your thoughts'? What if you put that penny towards your retirement savings instead? If retirement is on the horizon, setting a few more pennies per dollar aside could help you be more financially prepared. If you're 50 or older this year, you're eligible to contribute an additional \$7,500 to your 401(k) account over and above the annual IRS limit. Catch-up contributions may help you reach your savings goal faster. Any earnings your savings generate go back into your account without being taxed, improving potential growth opportunities (taxes are due upon withdrawal)."

September 13, 2024

Targeted Age group	Sent	Delivered	Total opens*
20-29	108	105	97
30-49	793	790	736
50+	471	470	422

*Total opens is cumulative.

Age 20-29

Age 30-49

Age 50+



Clackamas County – Increase Deferral Amount

Deployment metrics – 9/13/24

Targeted Age Group	Delivered	Unique opens		
		Total	Desktop	Mobile
20-29	105	60 (57.1%)	59 (98.3%)	1 (1.7%)
30-49	790	434 (54.9%)	438 (97.55%)	11 (2.45%)
50+	470	244 (51.9%)	237 (97.1%)	7 (2.9%)

Hyperlinks clicked – 9/13/24

Click Activity	Targeted Age Group		
	20-29	30-49	50+
Log in (clackamas.beready2retire.com)	2 / 60 (3.33%)	12 / 434 (2.76%)	2 / 244 (0.82%)

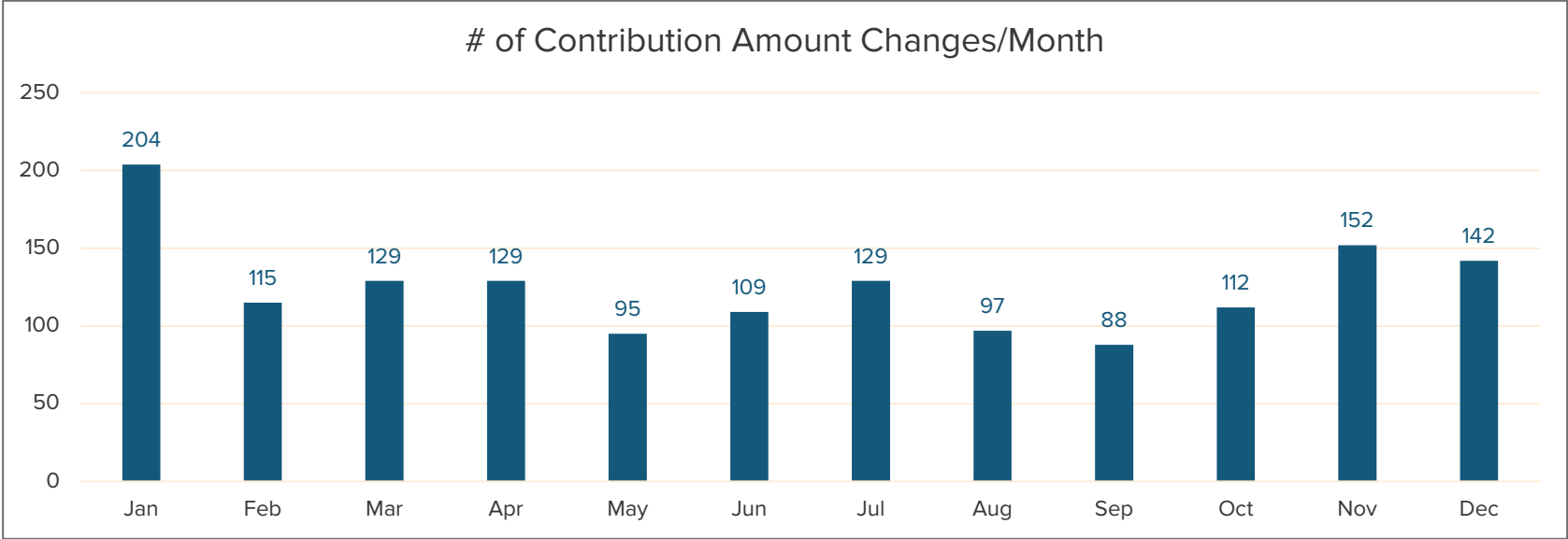
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Email Marketing Benchmarks for 2023:

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Clackamas County – Plan metrics: Deferral changes

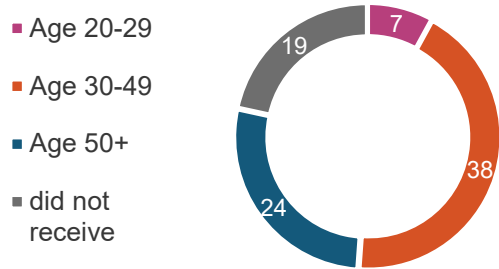


Email deployment 1: 9/13/24

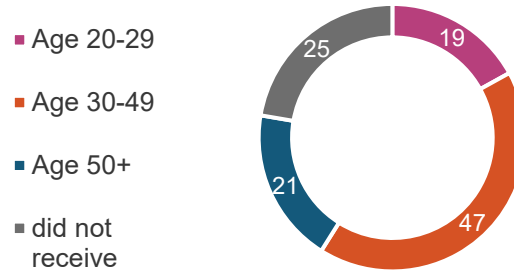
Clackamas County – Plan metrics: Deferral changes

ppt = unique participant: a ppt may have conducted a transaction in more than one month

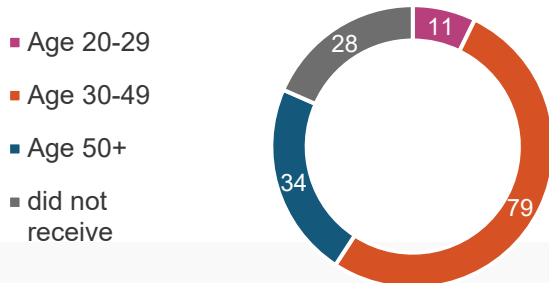
September - 88 transactions



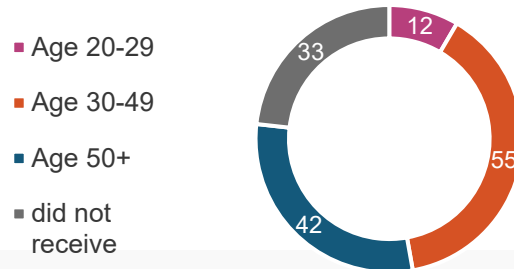
October - 112 transactions



November - 152 transactions



December - 142 transactions



Overall engagement:

Age 20-29:

18 of 105 ppts took action across all months = **17.1%**

Age 30-49:

144 of 790 ppts took action across all months = **18.2%**

Age 50+:

80 of 470 ppts took action across all months = **17.0%**

Clackamas County – Website metrics

Visits by Month:

month	visits
Jan 2024	355
Feb 2024	176
Mar 2024	157
Apr 2024	171
May 2024	172
Jun 2024	116
Jul 2024	58
Aug 2024	76
Sep 2024	143
Oct 2024	138
Nov 2024	129
Dec 2024	147

