Return Path

2014 Sender Score
Benchmark Report

SENDER SCORE: WHY REPUTATION MATTERS IN EMAIL MARKETING

55
SCORE

BLACKLIST

!
SPAM COMPLAINT

EMAIL

Every email sender has a reputation, or Sender Score. A Sender Score is a proxy for mailbox providers' view of the IPs that send commercial email – their reputation. A composite of a broad spectrum of indicators that signal how legitimate and welcome messages are, Sender Score includes spam complaints, messages sent to unknown users, subscriber engagement, industry whitelists and blacklists, and many other factors in its determination of reputation.

This global sample of more than 100 billion messages offers a view of the mailstream from the mailbox provider's perspective. Its analysis can help legitimate senders understand the deliverability landscape from the receiver's vantage and provide benchmarks to compare sending reputations not only to the full set of global senders, but to the best, most effective senders in the world.
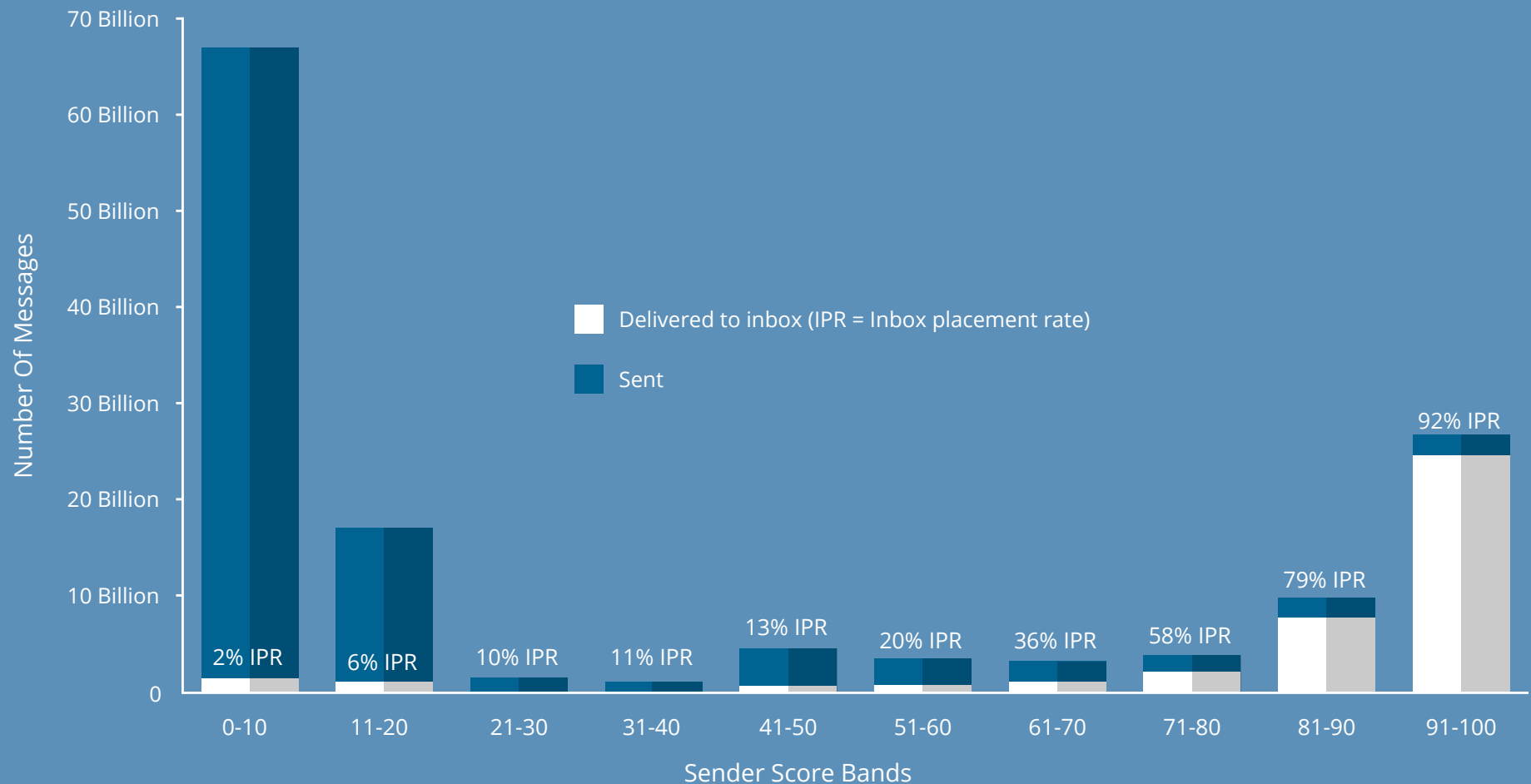
GLOBAL SENDER REPUTATION: ALL SENDERS

Most email is spam. For consumers and legitimate marketers, the good news is that messages from IPs with bad reputations rarely get to the inbox. In fact only 28% of all messages sent worldwide ever reach the inbox. For the mailbox providers whose systems face the challenge of sifting through trillions of clearly unwanted messages to deliver the valued ones, the only good news is that worst are easy to spot. These are the messages most likely to be sent to large numbers of of unknown addresses; and when they do reach subscribers, they draw complaints.

At the other end of the spectrum, nearly 30% of all messages come from IPs with Sender Scores of 71 or better; almost 20% from those in the highest range – 91-100. Mail from the best scoring senders rarely draws complaints or goes to unknown addresses. Most mail from these senders reaches the inbox, from slightly more than half (58%) for IPs scoring 71-80, to nearly 80% for IPs scoring 81-90, to a respectable 92% for those whose Sender Scores top 90.

That leaves only 10% of messages in the middle 5 scoring bands, from 21 to 70. Most of these messages don't reach subscribers – only 20% get to the inbox. When consumers do get these messages, they complain: compared to the 91-100 sender score band, messages from these middle bands are nine times is likely to draw spam complaints.

More than 60% of all messages come from ips with sender scores of 20 or worse (on a 0-100 scale); nearly half from ips with sender scores of 10 or worse. Less than 3% of this mail ever reaches the inbox.

Most Email Sent Is Spam, But Most Email Delivered Isn't

Number Of Messages

- 70 Billion
- 60 Billion
- 50 Billion
- 40 Billion
- 30 Billion
- 20 Billion
- 10 Billion
- 0

Legend:
- ⬜ Delivered to inbox (IPR = Inbox placement rate)
- 🟦 Sent

Sender Score Band	IPR
0-10	2% IPR
11-20	6% IPR
21-30	10% IPR
31-40	11% IPR
41-50	13% IPR
51-60	20% IPR
61-70	36% IPR
71-80	58% IPR
81-90	79% IPR
91-100	92% IPR

Sender Score Bands

LEGITIMATE SENDERS: TOP PERFORMING SENDER SCORE BANDS

Almost no legitimate email comes from IPs with Sender Scores below 71. Email marketers with list hygiene or subscriber engagement problems (e.g., spikes in spam complaints) may see individual IPs score below this threshold occasionally, but on a global basis most mail from Sender Score bands between 0 and 70 fails to reach consumers. "Real" senders – email marketers with permission to contact subscribers – are virtually all in the top three bands, but even within this comparatively reputable group, the disparity between them is dramatic. Only the best are succeeding.
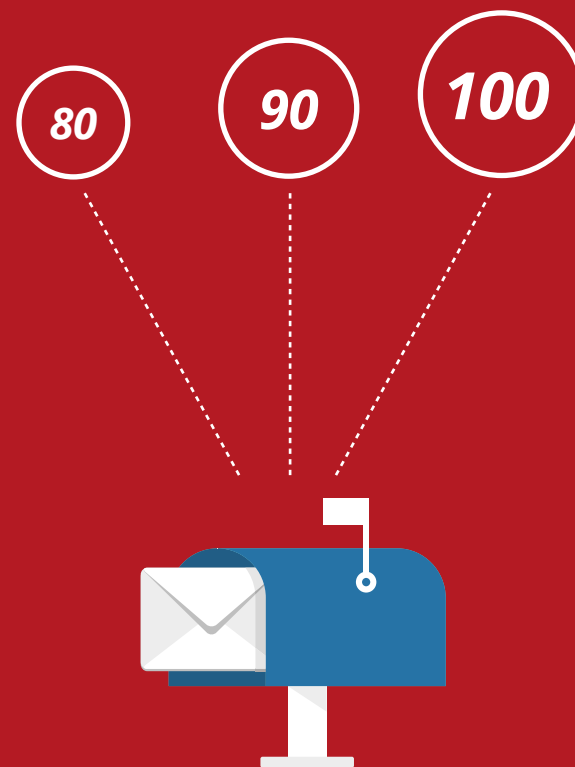
More than 20% of messages from senders with scores between 71 and 80 are blocked outright by mailbox providers, and less than 60% get to the inbox. Making it to the inbox isn't always good news for these senders, either. No Sender Score band is more prone to spam complaints: almost 2% of these messages spark spam complaints when they reach subscribers. These senders are also three times as likely to send mail to unknown addresses (a strong indication of poor list hygiene) and their mail is three times as likely to go to the spam or junk folder. Fortunately these messages represent less than 10% of legitimate email.

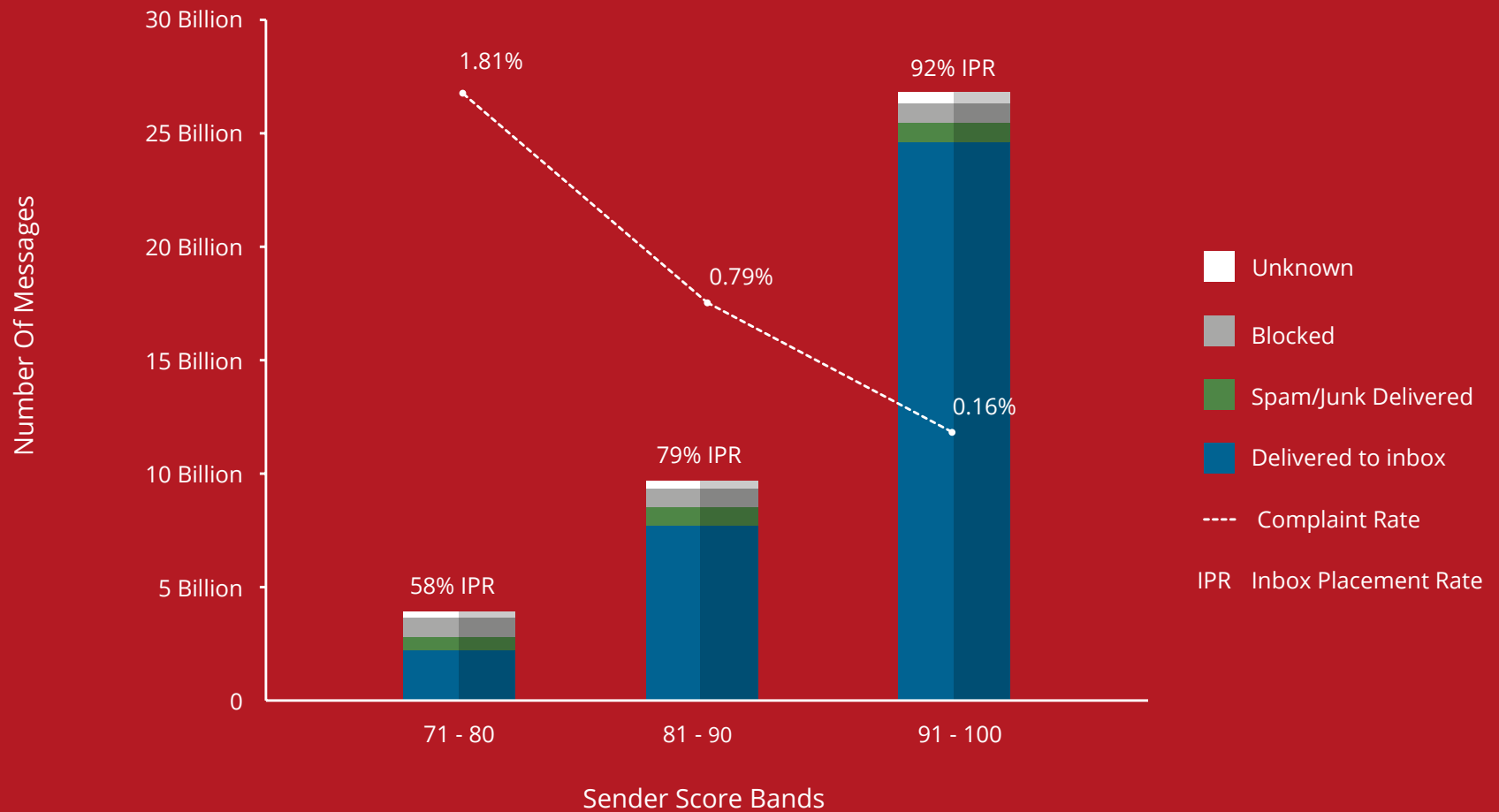**Almost no legitimate email comes from IPs with Sender Scores below 71.**

Nearly 80% of messages from the next-best tier—with Sender Scores from 81-90 - reach subscribers' inboxes, and when they do people are far less apt to lodge spam complaints. These messages are also half as likely to wind up in the spam or junk folder as those from senders in the 71-80 band. Nevertheless these senders consistently lose messages to the spam folder and blocking. Even those with Sender Scores of 90 fail more than 20% of the time to get mail to the inbox.

Only senders in the top-performing band, scoring between 91 and 100, consistently reach their targets. More than 90% of their messages make it to the inbox, and only 3% are delivered as spam or junk. The most striking point of differentiation between this group and other legitimate senders is their spam complaint rate: 0.16% of top-scorers' messages trigger complaints vs. 0.79% of the second-tier's messages – or roughly five times worse than the 91-100 band.

The top Sender Score band isn't a particularly exclusive club - it includes most of the messages sent from legitimate mailers (66%), and most of all messages delivered globally, regardless of sending reputation (62%). But even within this top-performing group, performance disparities separate clear winners from also-rans.

Spam Complaints Plague All But the Most Reputable Senders

Number Of Messages

30 Billion

25 Billion

20 Billion

15 Billion

10 Billion

5 Billion

0

1.81%

0.79%

0.16%

58% IPR

79% IPR

92% IPR

71 - 80   81 - 90   91 - 100

Sender Score Bands

Unknown

Blocked

Spam/Junk Delivered

Delivered to inbox

----   Complaint Rate

IPR   Inbox Placement Rate

GOOD-BETTER-BEST:
DIVISIONS WITHIN THE TOP SENDER SCORE BAND

Fourteen percent of all email delivered in the world comes from the best-of-the-best, mailers with Sender Scores of 99 or 100—and virtually no one complains about it. Only 0.03% of these messages (three per 10,000) trigger a spam complaint. Subscribers unequivocally want these email messages, and mailbox providers respond by delivering 98% to the inbox. Email marketers that fall into this group maintain their connections and relationships with consumers dramatically better than their peers. They deliver less than 1% of their messages to the spam or junk folder, they maximize their email response opportunity from every campaign they send, and they position their email programs to drive more revenue than their competitors'.

14%

99-100

0.03%
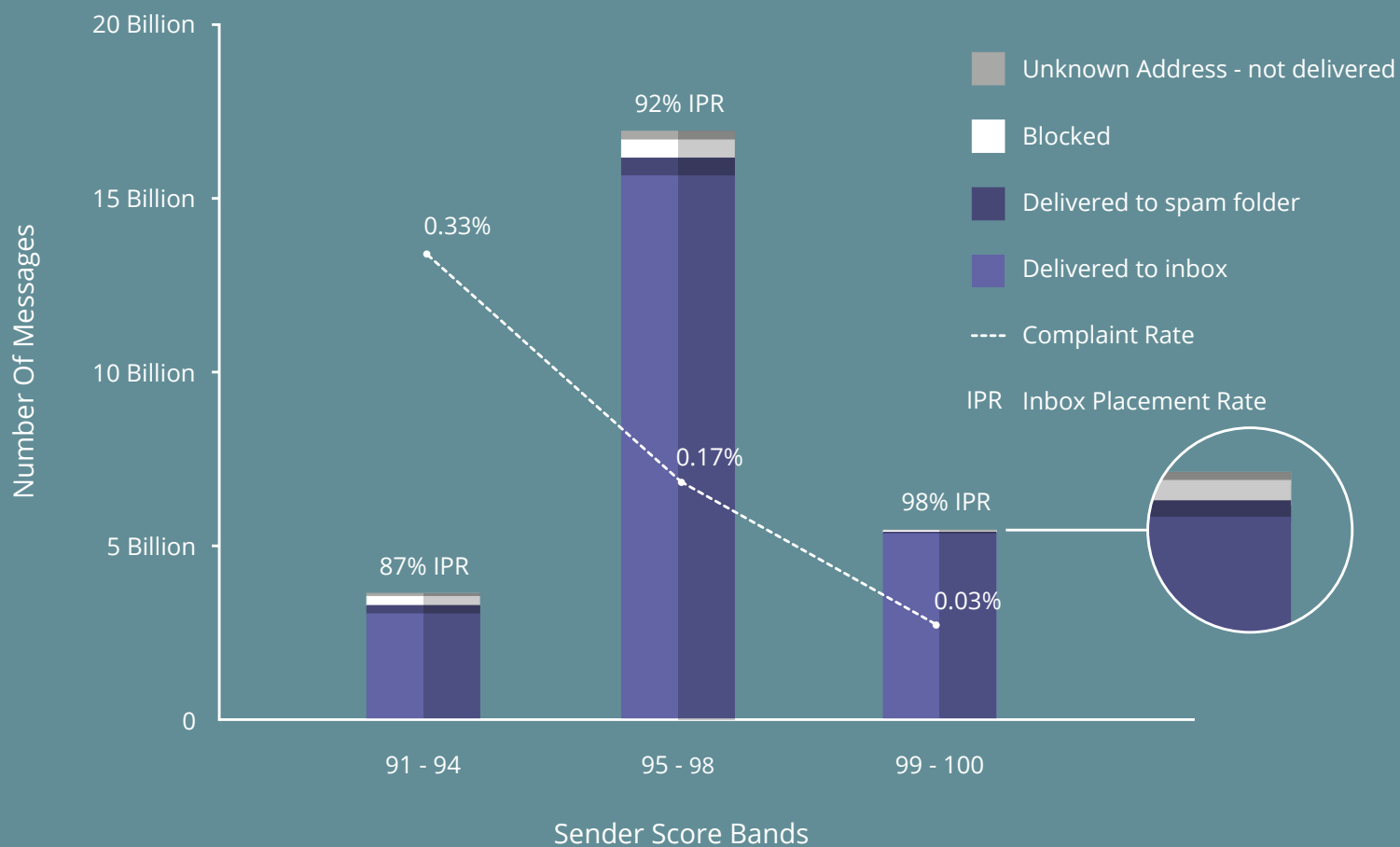
EMAIL DELIVERED

SCORE

COMPLAINTS

The bottom-of-the-top simply isn't keeping up. Mailers with Sender Scores between 91 and 94 far outperform global averages, but they lag well behind the top performers. Complaint rates tell the story here, too: 0.33% of their messages spark complaints, which is far below worldwide averages, but more than 10 times the best senders' rates. They send four times more messages to unknown addresses, signaling to mailbox providers that they have weak list hygiene or sloppy subscriber acquisition practices. The result: Nearly one message for every seven they send (13%) fails to reach a subscriber, despite a relatively strong Sender Score. For email marketers in this group attaining a Sender Score of 94 distinguishes them from middling-to-bad senders, but it places their programs well below the performance levels of their actual industry peers.

Most messages in the 91-100 band come from the middle of the bell curve - from mailers with Sender Scores between 95 and 98 - accounting for 40% of all email delivered in the world. As marketers they perform reasonably well: far ahead of those scoring 91 to 94, but also far behind those scoring 99 to 100. Their complaint rates (0.17%) are half of the 91-94 senders' but still five times higher than the best senders'. Their deliverability is good but not great: slightly more than 8% of their messages fail to reach the inbox. Although a marketer with a Sender Score of 98 is likely to outperform most legitimate competitors, advancing to the next tier represents, on average, a 6-7% performance improvement. Most "good" senders – with high Sender Scores and strong reputations – appear to be relatively adept at maintaining their email connections, but they generally trail their top-ranked peers by a wide margin.

Mailers with Sender Scores between 91 and 94 far outperform global averages, but they lag well behind top performers.

Good-Better-Best: Elite Marketers Outperform Even Reputable Senders

Number Of Messages

- 20 Billion
- 15 Billion
- 10 Billion
- 5 Billion
- 0

Legend:
- Unknown Address - not delivered
- Blocked
- Delivered to spam folder
- Delivered to inbox
- ---- Complaint Rate
- IPR Inbox Placement Rate

92% IPR

0.33%

0.17%

87% IPR

98% IPR

0.03%

Sender Score Bands

91 - 94   95 - 98   99 - 100

CONCLUSION: HOW TO GET TO THE NEXT LEVEL

Failing to reach the inbox is a fatal error in email marketing. It happens 2% of the time to even the most reputable email senders in the world (those with Sender Scores of 99 to 100). To those with Sender Scores between 91 and 98, it happens four-to-seven times more often, and more than twenty times more often to those in the 71-90 range. Everyone else fails more often than not.

Although the most reputable senders distinguish themselves in a number of areas - including sending fewer messages to unknown addresses - nothing differentiates the field like complaint rates. Messages from the best senders generate very few spam complaints; messages from the next-best senders generate a lot more. Chasing the best-performing email marketers in the world - the ones that rarely fail to deliver their messages to the inbox means reducing spam complaints.

100

90

80

70

People complain about email for a variety of reasons: they didn't give (or don't remember giving) permission to contact them, or they expected something different, or more, or less. They may find it easier to complain than to opt-out, which some senders cite as a reason to reduce the impact of complaints on their reputations. This report doesn't support their argument though: subscribers don't complain equally about all commercial messages - some senders virtually never get complaints, while others attract them in bunches.

A range of email marketing tactics, including disciplined acquisition and list hygiene, strong onboarding and subscriber feedback programs, and progressive preferences management can help to identify and reduce sources of complaints. Improving these practices will likely improve other elements of sender reputation, too, increasing Sender Scores in the process.

Mailbox providers confront an astounding number of decisions every day about which messages to deliver. Sender Scores offer insight into those decisions, but at the high end of the Sender Score spectrum it's the subscribers themselves and their interactions with messages that guide the determination. Some marketers inspire loyalty and action with every message they send. Others struggle constantly with fatal errors, frequently failing to make it to the inbox, often unable to reach the people whose response can help them get to the next level of email marketing success. In both cases, their reputations precede them.

Some senders virtually never get complaints, while others attract them in bunches

Methodology

To conduct this report Return Path studied a representative sample of 138.7 billion messages sent during 2013 from IP addresses whose Sender Score was calculated, and whose subscriber engagement and inbox placement data were available for analysis. In addition to Sender Score data, this report used data from the Return Path Reputation Network to track inbox placement rates across mailbox providers. Data used for this report were aggregated and anonymous, and not limited to Return Path clients. Service available at: **www.senderscore.org.**

Our data enables the world's leading brands to matter more

We analyze the world's largest collection of email data to show marketers how to stay connected to their audiences, strengthen their customer engagement, and protect their brands from fraud. Our solutions help mailbox providers around the world deliver great user experiences and build trust in email by ensuring that wanted messages reach the inbox while spam and abuse don't. Consumers use Return Path technology to manage their inboxes and make email work better for them.

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