



2016 DELIVERABILITY  
**BENCHMARK**

---

REPORT

*Analysis of Worldwide Inbox Placement Rates*

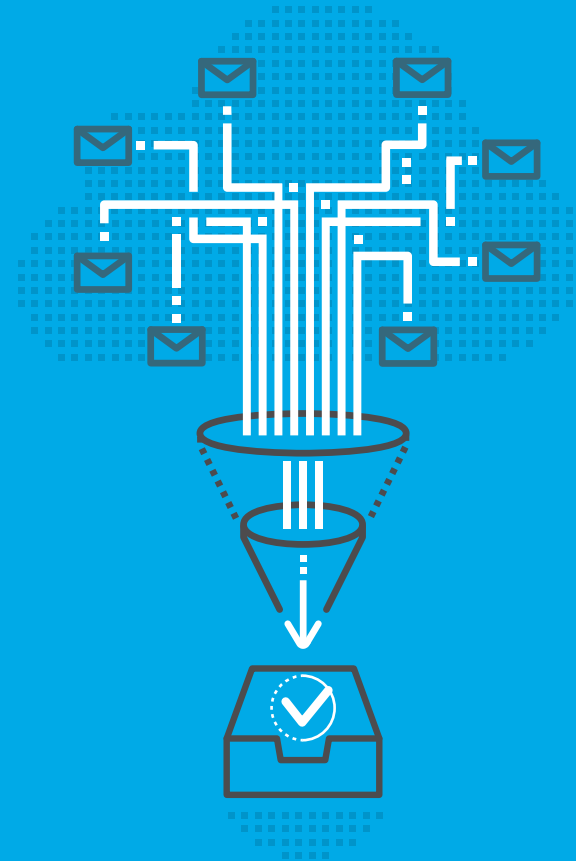
# INTRODUCTION

In 2016, email turns 45 and shows no signs of slowing down. In fact, it's one of the most widely used and trusted channels for people to communicate today. It's helped elect world leaders and has been the secret ingredient for many startups to grow into multi-billion dollar companies.

But the dark side of email is spam. While today's spam filters do a good job of keeping junk out of our inboxes, many organizations also get caught in the crossfire of the war on spam when their emails end up in the spam folder. If your subscribers don't see your emails, then they can't open, click, and convert.

While the importance of reaching customers' inboxes is undeniable, the reality is that many messages are missing the mark. This year, on average, one in five messages failed to reach the inbox. Global deliverability also experienced a slight but steady decline quarter over quarter, with 24 percent of messages missing the inbox in the last quarter studied.

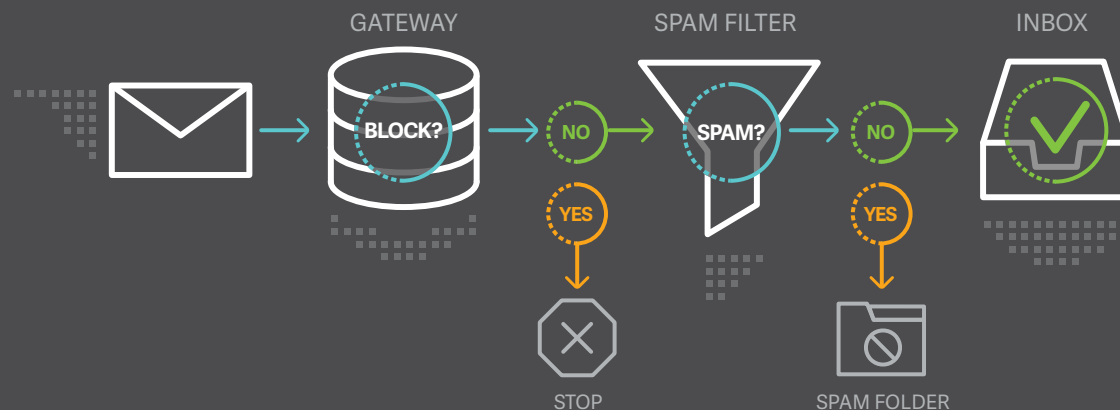
With deliverability declining, marketers are missing out on building valuable relationships and achieving the highest possible ROI. In this year's annual benchmark report, we take a look at how email is delivered and how to measure inbox placement, followed by global and regional benchmarks broken out by quarter.



# THE PATH TO THE INBOX

Getting to the inbox entails more than hitting the send button. Below is a representation of the filters each message encounters on its journey.

Emails that are able to make past both gateway and spam filters are delivered to the inbox. Emails that are deemed malicious or untrustworthy are often blocked at the gateway, never reaching the inbox or the spam folder. For messages that make it past the gateway, spam filters look at the reputation of the sender, subscriber engagement, and content to decide if it should be placed in the inbox or the spam folder.



# MEASURING INBOX PLACEMENT

There are many different ways to measure deliverability. In this report, we will focus on one important source: seed data

Seed addresses were one of the first ways Return Path and email marketers measured inbox placement rates. Have you ever tested an email campaign's deliverability rate by sending it to your personal email address? That's similar to how seed addresses work. But at Return Path, we have seed addresses at hundreds of mailbox providers and filters around the world, and we provide multiple addresses per mailbox provider. When marketers send email to the seed addresses, our software checks to see if it was delivered, and if so, reports whether it went to the inbox or the spam folder.

## Seeds:

- + 140+ global and regional mailbox providers
- + Measure missing/blocked emails
- No engagement data
- Smaller sample

Another way to measure deliverability is by monitoring the activity of real consumer inboxes. This is possible through our [Consumer Network](#). Consumer Network data is different from seed data in that the data is generated from real email accounts that are actively owned and managed by real subscribers at AOL, Gmail, Outlook.com, and Yahoo. Through our Consumer Network, we are able to gather real world data and real world email behaviors. For example, if an email lands in the inbox or spam folder, we can see whether or not people read an email, reported it as spam, or many other [hidden user behaviors](#).

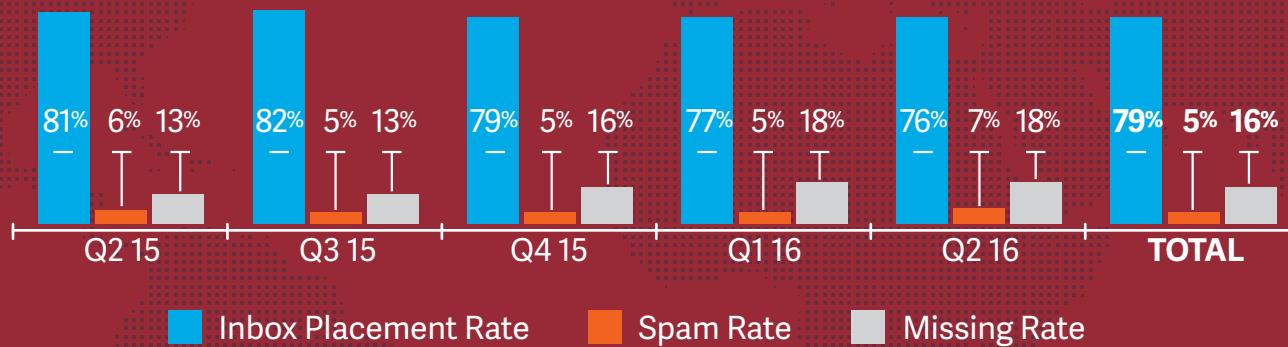
## Consumer Network:

- + Over two million active users
- + Engagement data
- Current coverage includes Outlook, Yahoo, AOL, and Gmail only
- Cannot measure missing/blocked mail

Both of these sources of data have their strengths and weaknesses, and each will provide slightly different deliverability numbers as a result of their different inputs. Using [both together](#) provides a more complete, holistic view of your deliverability.

# GLOBAL INBOX PLACEMENT

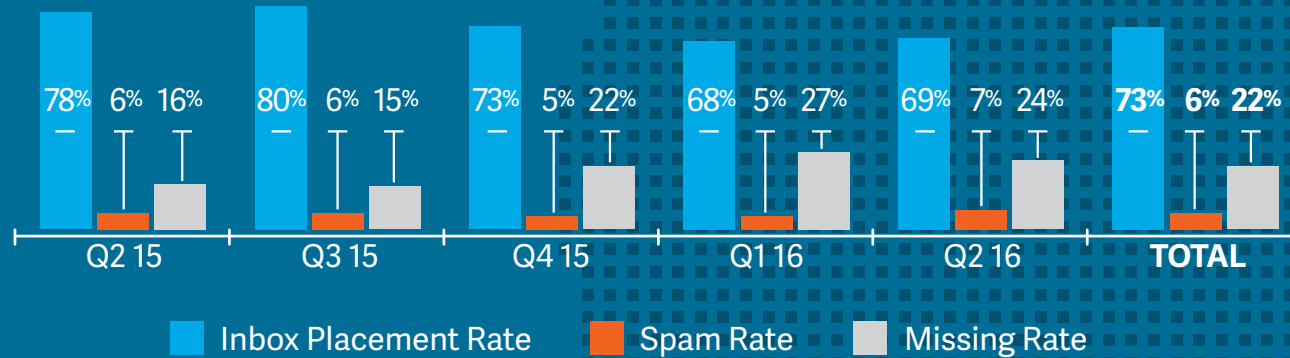
Globally, the average inbox placement rate stood at 79 percent, but declined from 82 percent in the third quarter of 2015 to 76 percent in Q2 of 2016.



# UNITED STATES

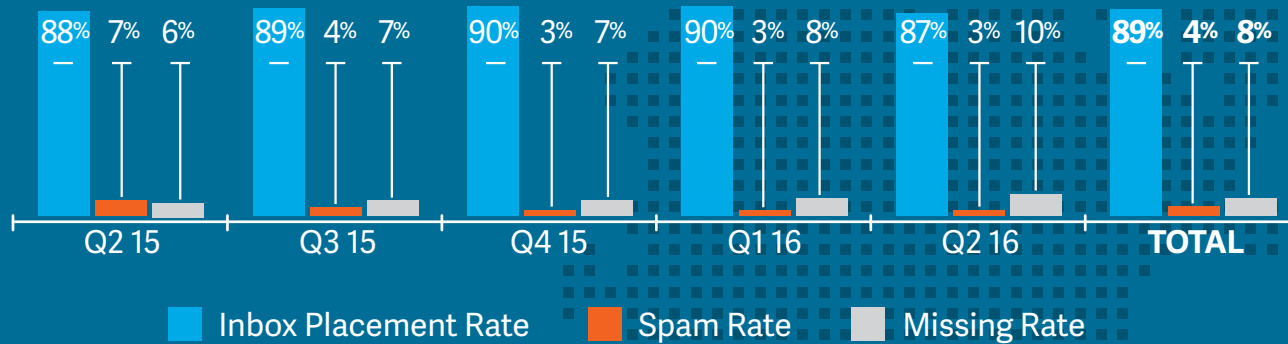


Marketers in the United States struggled to reach the inbox compared to the global average, seeing only 73 percent of messages delivered to the inbox. This low number is the result of senders' difficulties in the beginning of 2016, when inbox placement dropped below 70 percent.



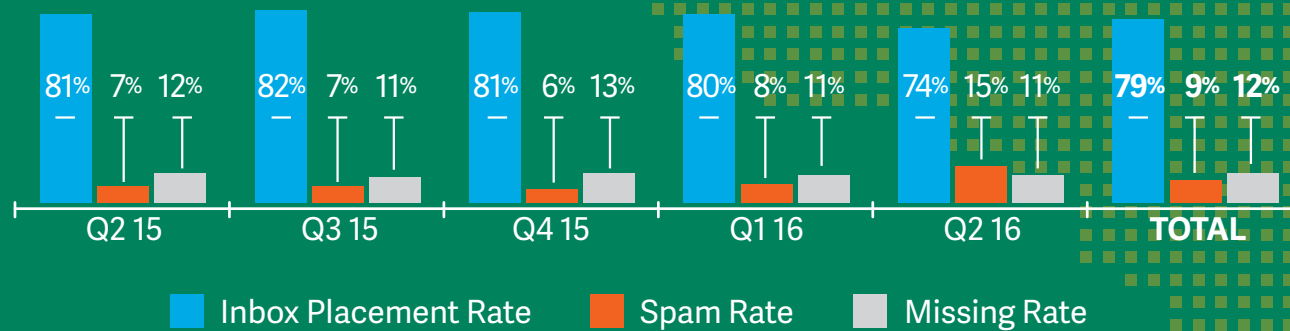
# CANADA

Canadian email marketers consistently remained above the global average—ranging from 87 to 90 percent—with a period average of 89 percent inbox placement.



# BRAZIL

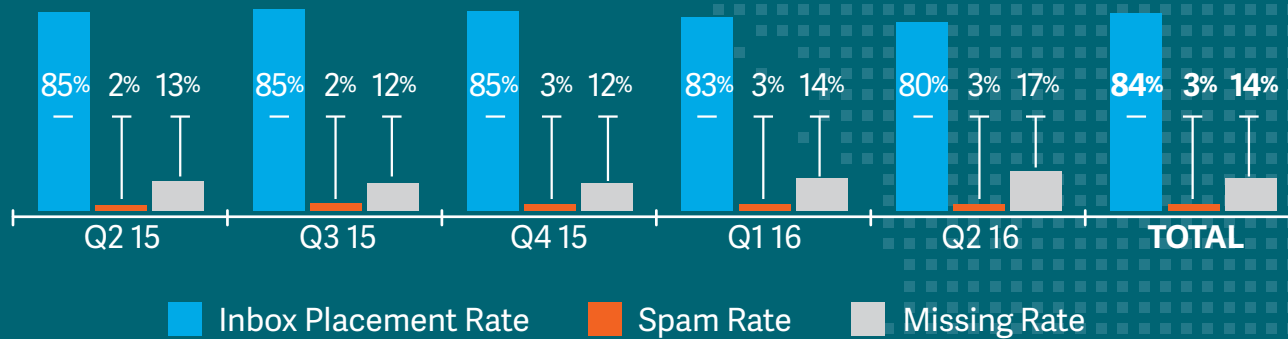
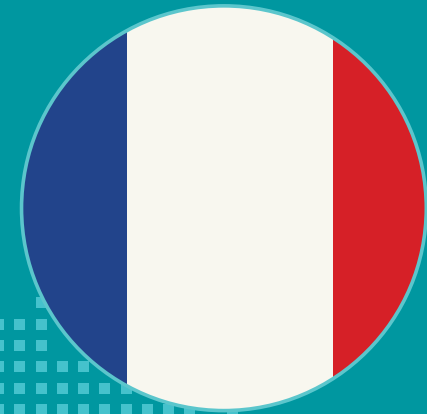
In Brazil, the inbox placement rate for the year was 79 percent. While Brazil saw inbox placement rates range from 80 percent to 82 percent during the first four quarters analyzed, a sharp decline to 74 percent in Q2 2016 dragged their average inbox placement rate down.





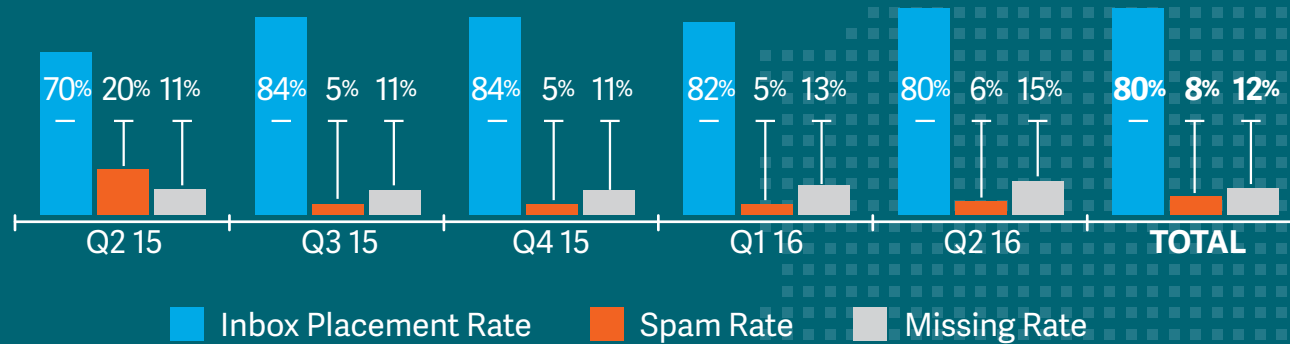
# FRANCE

Email marketers in France saw inbox placement fluctuate between 80 and 85 percent, with an average inbox placement rate of 84 percent.



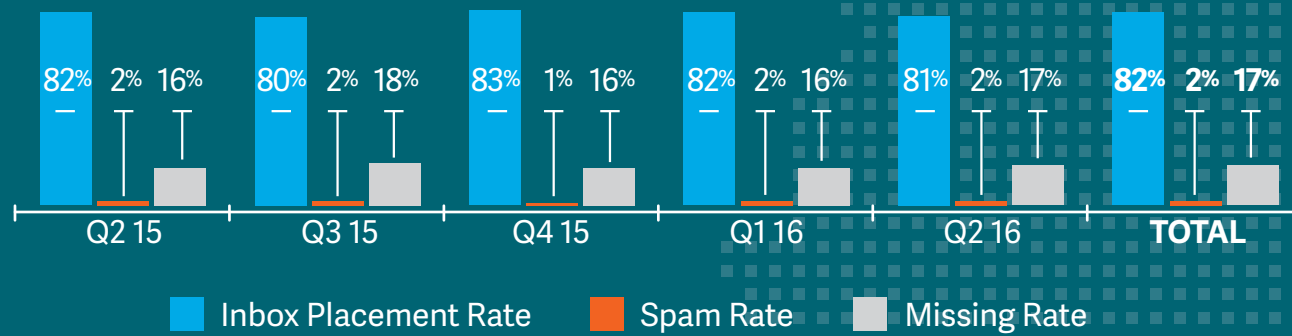
# GERMANY

In Germany, marketers saw a stronger spring in 2016 with a 10 percent increase in inbox placement over the same time period in 2015.



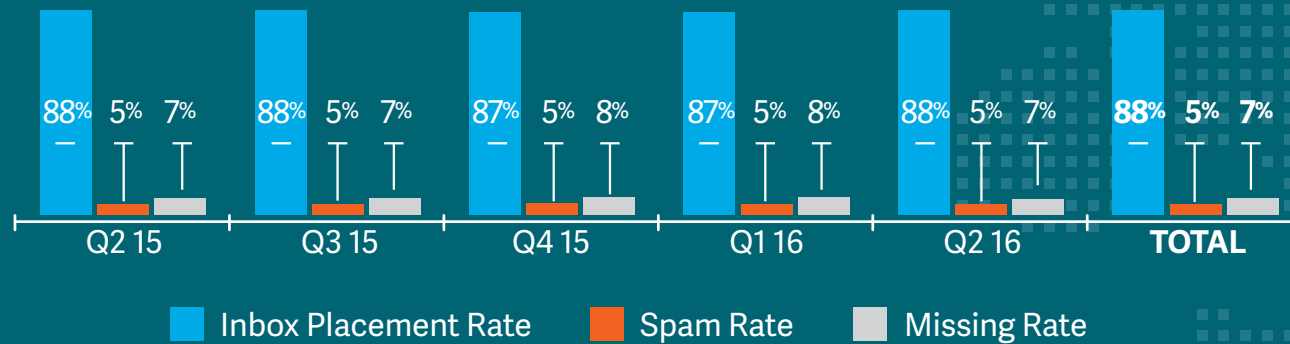
# SPAIN

Marketers in Spain saw fluctuations in deliverability slightly above and below its average inbox placement rate of 82 percent.



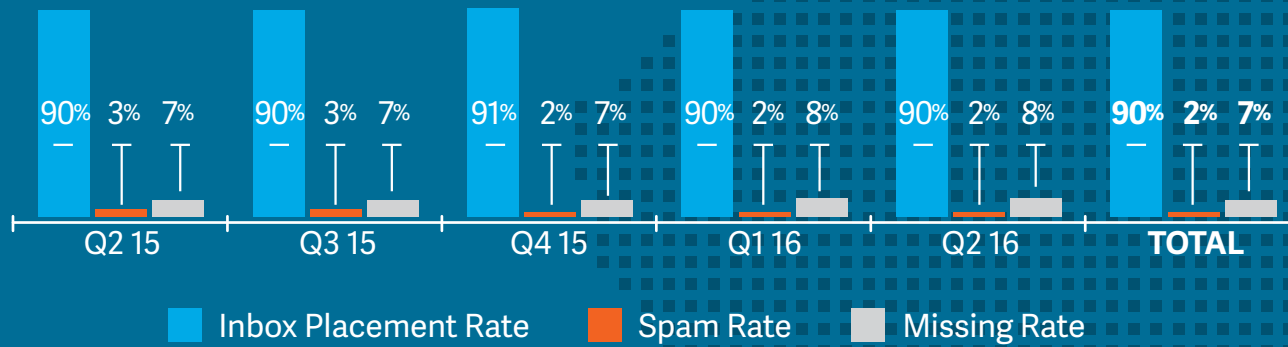
# UNITED KINGDOM

In the United Kingdom, marketers saw messages delivered to the inbox 88 percent of the time. Inbox placement rates held steady at 88 percent through the year, only slightly dipping to 87 percent in Q4 2015 and Q1 2016.



# AUSTRALIA

Australian marketers maintained 90 percent or better inbox placement rate over all five quarters.



# INCREASING YOUR DELIVERABILITY

Getting into the inbox is essential for a successful email program and achieving the highest possible ROI, however this year's metrics show there is much room for improvement. Marketers looking to boost their own deliverability need to focus on four major elements in their email program.

## Deliverability basics

Earlier in this report we discussed a simplified version of an email's path to the inbox and the filtering process they're subjected to. For a full understanding of how email deliverability works—the process, elements, and solutions—read our [Ultimate Guide to Deliverability](#).

## Building and maintaining reputation

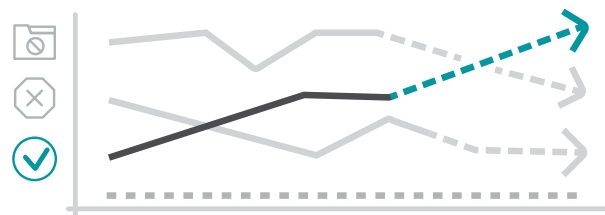
If you send email, whether you know it or not, you have a sender reputation. Your sender reputation is a rating that helps mailbox providers and spam filters determine whether your emails are trustworthy, safe, and wanted. Look up your sending reputation, or Sender Score, for free at [senderscore.org](#) and then read our [2016 Sender Score Benchmark](#) to understand how your reputation impacts your ability to reach the inbox.

## Acquiring and maintaining quality subscriber data

An unclean list has severe consequences on your deliverability. Every spam trap, unknown user, and inactive account on your list can damage your reputation, your deliverability, and potentially can land you on a blacklist. Download our ebook, [50+ Ways to Grow Your List](#), for new ways to collect quality email addresses. You might also consider investing in a [list validation service](#) to ensure each address you add will maintain the quality of your list.

## Generating subscriber engagement

Mailbox providers like Microsoft, Yahoo, AOL, and Gmail, are focusing more and more on subscriber engagement in their filtering decision process. Marketers who frequently generate high positive engagement from their subscribers are more likely to reach the inbox, while marketers that generate low or negative engagement from their subscribers find their emails landing in the spam folder. For an understanding of the different engagement signals mailbox providers look for, check out the [Hidden Metrics of Email Deliverability](#).



# METHODOLOGY

Return Path conducted this study using a representative sample of more than 2.5 billion promotional email messages sent to consumers around the world between April 2015 and June 2016. Global and regional statistics are based on performance across more than 140 mailbox providers in North America, South America, Europe, and Asia-Pacific regions.

## Defining seed data:

Information captured from high volumes of monitored email accounts (seeds) controlled by senders to sample mailbox providers' placement decisions irrespective of user-initiated or engagement-based filtering. For new programs with little or no history of subscriber interaction, seeds can provide an accurate assessment of inbox placement.

## Defining Consumer Network data:

Information captured from monitored email accounts controlled by real subscribers to sample user-initiated and engagement based filtering decisions by mailbox providers. Consumer Network data can uncover behavior-based factors and thresholds that influence inbox placement at large mailbox providers, and can't be identified by non-interactive seeds.

