

# 2018 Deliverability Benchmark

*Analysis of Worldwide Inbox Placement Rates*



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# INTRODUCTION



The last 12 months were a busy time for email marketers. GDPR took effect May 25, requiring a thorough review of sending practices and causing many to pare down their subscriber lists. Gmail and others made it easier for their users to unsubscribe from email lists, leading to even further reductions in subscriber numbers. Yahoo and AOL consolidated their infrastructure under Verizon's Oath umbrella. And Gmail announced a new open platform and native support for AMP for Email, making emails more dynamic and interactive. While some of these have created challenges, these changes may actually benefit email marketers over the long term.

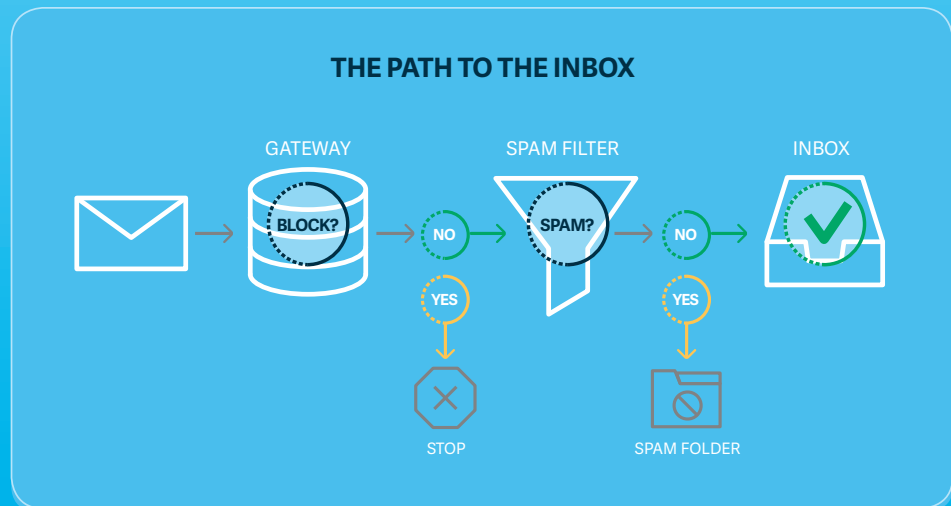
Despite these seismic changes in the email space, overall deliverability is improving. Globally, inbox placement rose five percentage points compared to the previous 12 month period. While this trend is good news for email marketers, there's more work to be done—15 percent of emails still fail to reach the inbox.

In this year's annual benchmark report, we take a look at how email gets delivered and how to measure inbox placement. We also explore the 12 month global, regional, and country inbox placement results, as well as inbox placement rates by industry and the top four mailbox providers.

## 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.

Email that is deemed malicious or untrustworthy is often blocked at the gateway, never reaching either 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 they should be placed in the inbox or the spam folder for each subscriber. Emails that make it past both gateway and spam filters are the only ones that reach the inbox.



# MEASURING INBOX PLACEMENT



At Return Path, we use two different sets of data to calculate inbox placement—seed data and Consumer Network data (often called “panel data”). Both of these data sources have their strengths and weaknesses, and each provides slightly different deliverability numbers as a result of their different inputs. [Using both together](#) provides a more complete, holistic view of your deliverability.

**Seed addresses** are one of the original methods used to measure inbox placement. Have you ever tested an email campaign’s deliverability 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. When marketers send email to these seed addresses, our software checks to see if it was delivered and reports whether it went to the inbox or the spam folder.

## Seed data:

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

**Panel data** shows placement results generated from real, actively managed email accounts. Through our [Consumer Network](#), we are able to gather this real world email data and real world information about subscriber engagement. For example, we can see if an email lands in the inbox or spam folder, whether or not the subscriber reads the email, whether they report it as spam, and many other [hidden user behaviors](#)

## Panel data:

- + More than 2 million active users
- + Measure engagement data
- Only covers Outlook, Yahoo, AOL, and Gmail
- No missing/blocked emails

Both sets of data are valuable. However, because they use different inputs, they provide different results. Specifically, inbox placement rates calculated with panel data do not factor in missing or blocked emails—so the resulting inbox placement rate will always be higher. Here’s an example using our 2018 inbox placement averages:

Panel data	Period Avg.	Seed data	Period Avg.
Global inbox placement rate	91% (see p. 15)	Global inbox placement rate	85%
Spam rate	9%	Spam rate	6%
Missing/blocked rate	N/A	Missing/blocked rate	10%

As you can see, we would get a much different seed data result if we eliminated blocked/missing emails from the calculation.

On the pages that follow, global and country specific inbox placement rates are calculated using seed data. We use seed data for these calculations because it provides excellent coverage with global and regional mailboxes, and allows us to capture information about missing and blocked email.

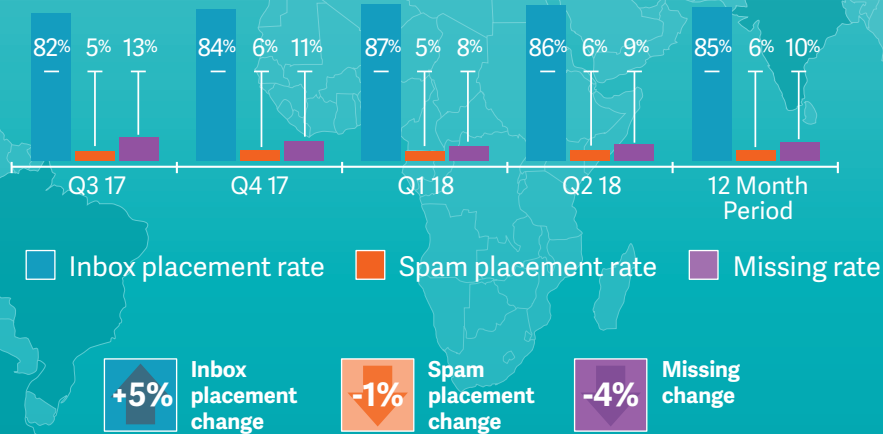
We measure mailbox provider and industry specific inbox placement rates using panel data. This data source provides a more complete view of subscriber engagement with the different mailbox providers and industries, and how it impacts inbox placement.

By using both seed and panel data, email marketers can get a clearer picture of their deliverability, including how factors like individual blocking and engagement filtering are impacting their inbox placement.

# GLOBAL INBOX PLACEMENT



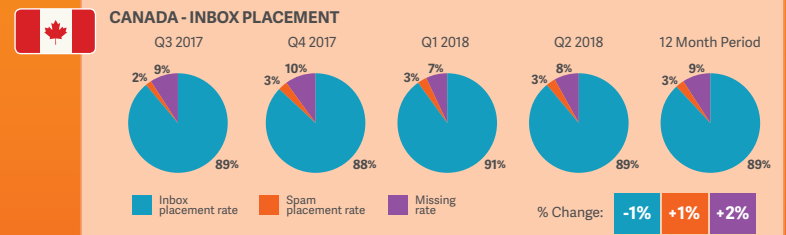
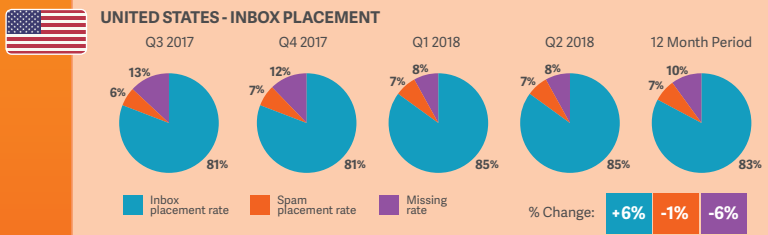
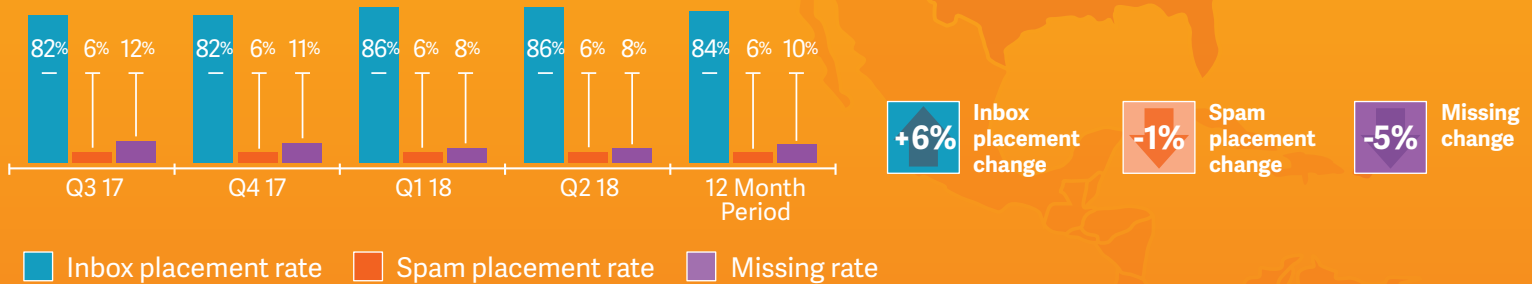
Average global inbox placement increased by five percentage points this year (85 percent versus 80 percent in the previous 12 months). This improvement was consistent throughout the year, with higher year-over-year inbox placement in each quarter of the reporting period. The most significant increase came in the second quarter of 2018, when inbox placement rose seven percentage points over the same period last year.



\*Due to rounding, some placement calculations will be slightly over or under 100%

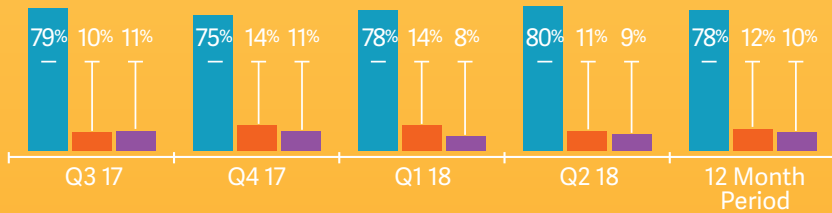
# INBOX PLACEMENT IN NORTH AMERICA

North America saw above average improvement in deliverability, although their overall results still fell short of the global average. Improved deliverability in North America was driven largely by increased inbox placement in the United States. Messages sent to US subscribers reached the inbox an average of 83 percent of the time—an increase of six percentage points over the previous period. Further north, senders experienced more challenges in reaching Canadian subscribers with a slight decline in inbox placement from the previous period. However, the average inbox placement rate to Canadian mailboxes of 89 percent exceeded the global average.



# INBOX PLACEMENT IN LATIN AMERICA

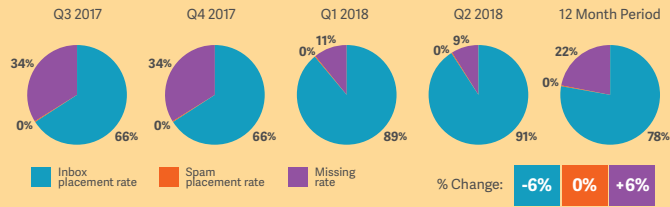
Inbox placement for countries in the Latin America region dropped three percentage points this period for an average of 78 percent. Argentina, Brazil, and Mexico all experienced declines in inbox placement from the previous period. Only Mexico was able to achieve deliverability above the global average.



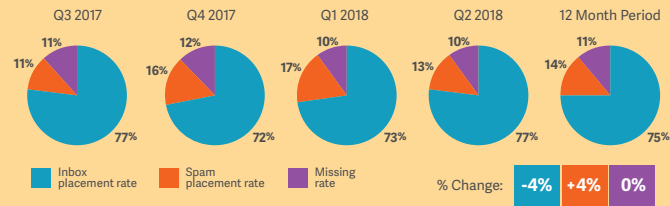
■ Inbox placement rate ■ Spam placement rate ■ Missing rate



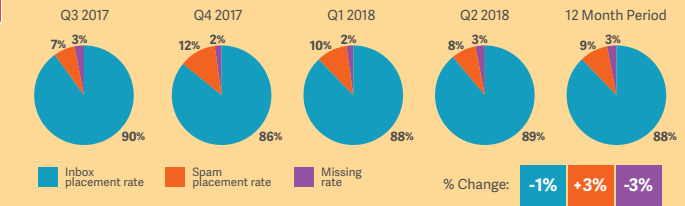
## ARGENTINA - INBOX PLACEMENT



## BRAZIL - INBOX PLACEMENT



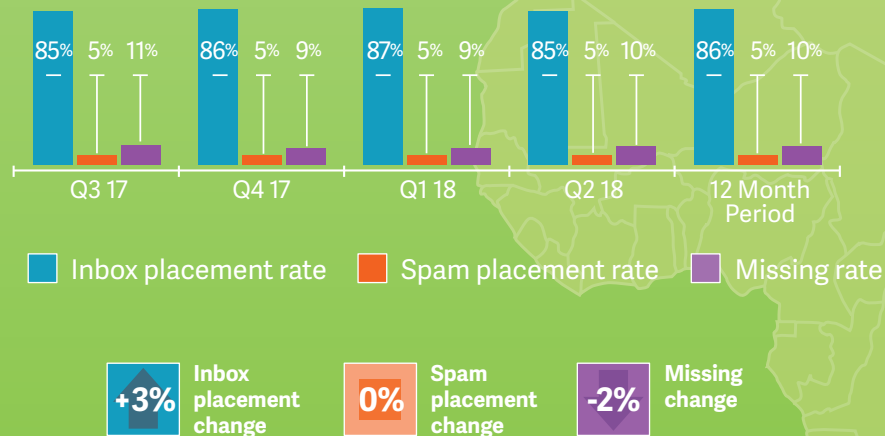
## MEXICO - INBOX PLACEMENT



## INBOX PLACEMENT IN EUROPE

Deliverability to European mailboxes rose slightly to an average inbox placement rate of 86 percent—just above the global average. Marketers sending to consumers in Greece, Portugal, and Norway had Europe’s the highest inbox placement at 93 percent, while Austrian mailboxes saw the lowest inbox placement of any European country (79 percent).

Marketers sending to mailboxes in Ireland made huge advances in deliverability with an increase of 15 percentage points for a new average of 92 percent inbox placement. Meanwhile, mailboxes in Denmark and the Czech Republic saw the largest decline in deliverability among European countries (three percentage points below the previous period).

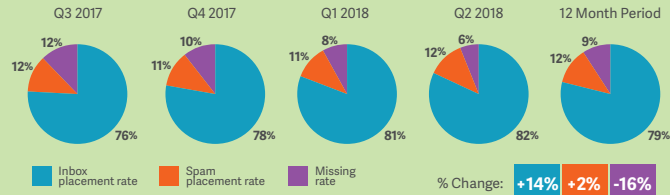




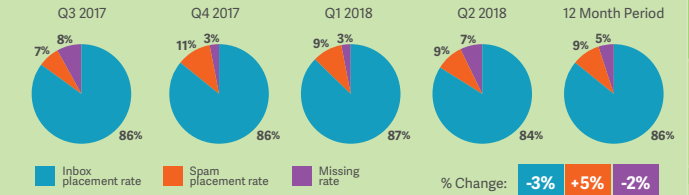
# EUROPE INBOX PLACEMENT BY COUNTRY



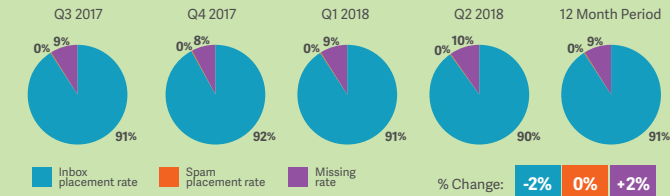
## AUSTRIA - INBOX PLACEMENT



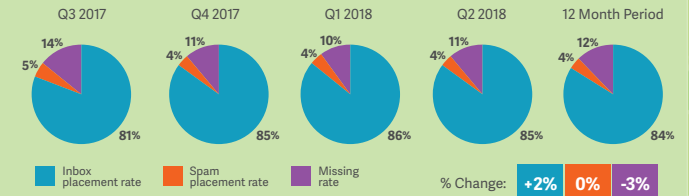
## DENMARK - INBOX PLACEMENT



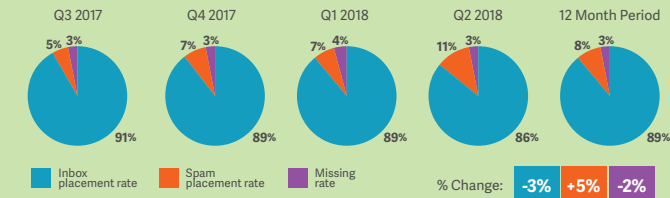
## BELGIUM - INBOX PLACEMENT



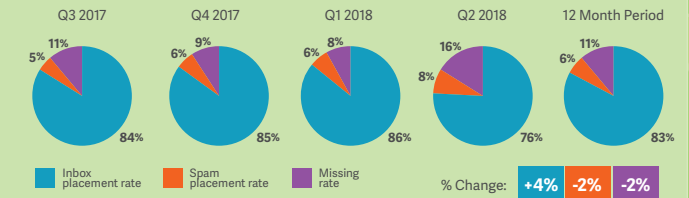
## FRANCE - INBOX PLACEMENT



## CZECH REPUBLIC - INBOX PLACEMENT



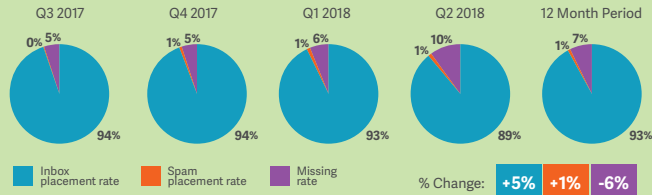
## GERMANY - INBOX PLACEMENT



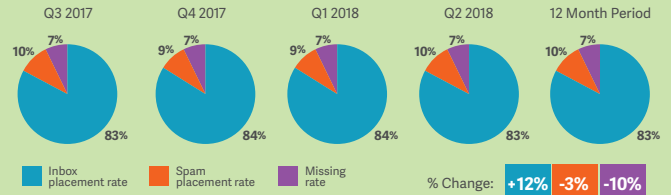
# EUROPE INBOX PLACEMENT BY COUNTRY



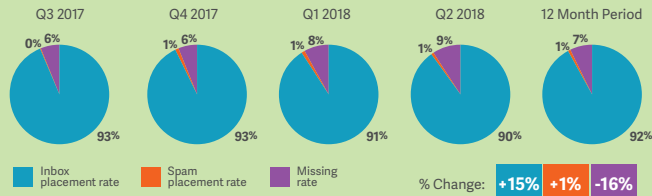
## GREECE - INBOX PLACEMENT



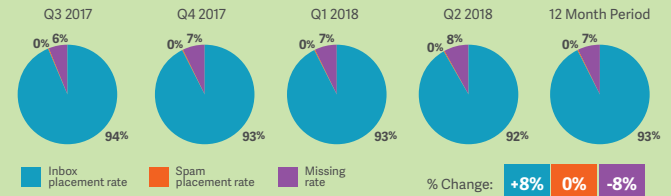
## NETHERLANDS - INBOX PLACEMENT



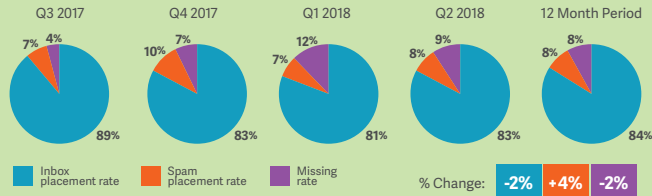
## IRELAND - INBOX PLACEMENT



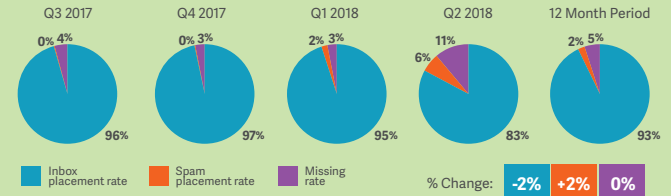
## NORWAY - INBOX PLACEMENT



## ITALY - INBOX PLACEMENT



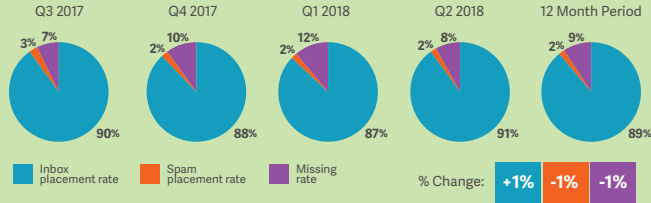
## PORTUGAL - INBOX PLACEMENT



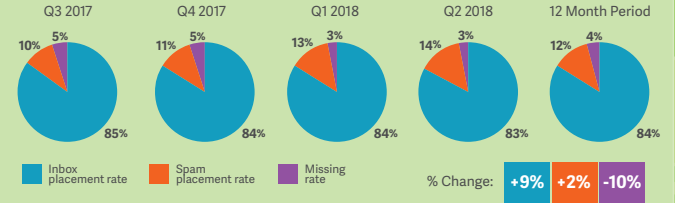
# EUROPE INBOX PLACEMENT BY COUNTRY



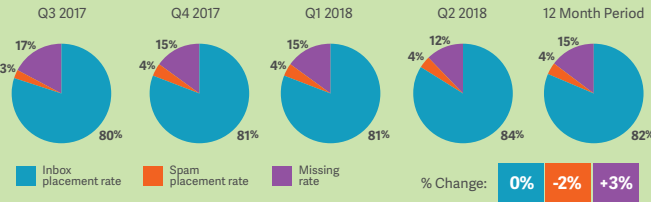
## RUSSIA - INBOX PLACEMENT



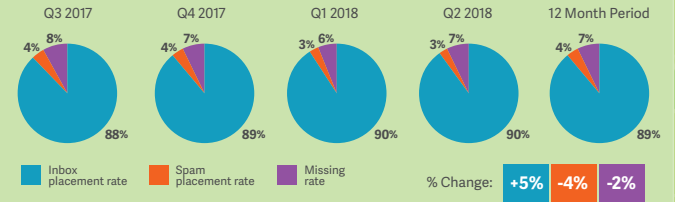
## SWITZERLAND - INBOX PLACEMENT



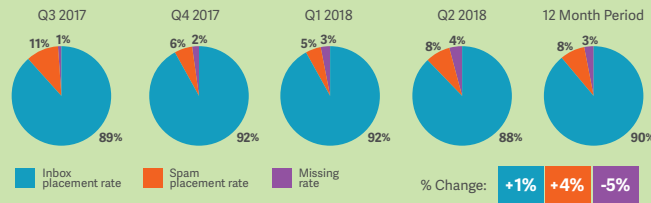
## SPAIN - INBOX PLACEMENT



## UNITED KINGDOM - INBOX PLACEMENT



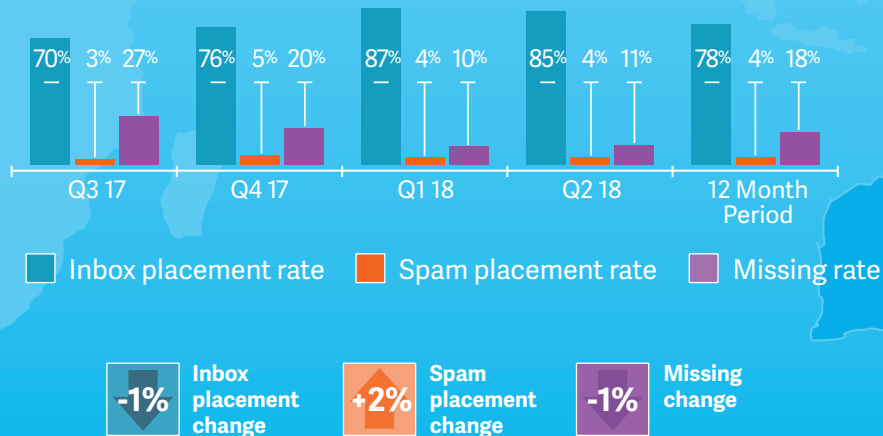
## SWEDEN - INBOX PLACEMENT



## INBOX PLACEMENT IN ASIA-PACIFIC

Marketers sending to mailboxes in the Asia-Pacific region saw a slight decline in inbox placement with an average rate of 78 percent, compared to 79 percent in the previous reporting period. This result also fell short of the global average for inbox placement.

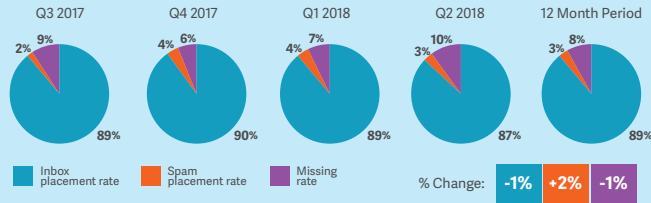
Senders in mailing to Singapore and New Zealand consumers helped bring up the regional average with inbox placement rates of 90 percent in both countries. Despite an increase of nine percentage points over the previous period, deliverability to Chinese mailboxes fell far below the global average with an average inbox placement rate of just 57 percent.



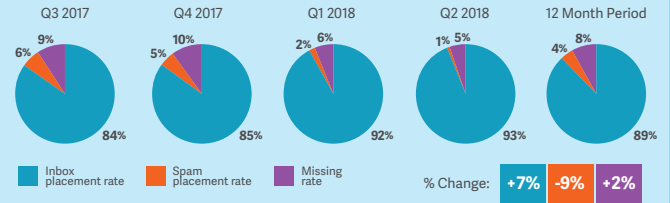
# ASIA-PACIFIC INBOX PLACEMENT BY COUNTRY



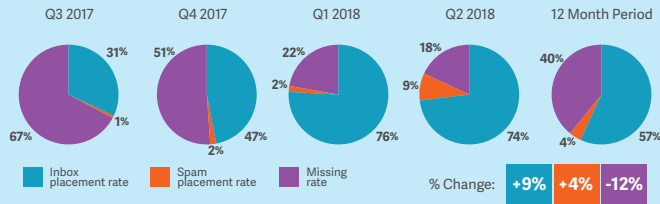
## AUSTRALIA - INBOX PLACEMENT



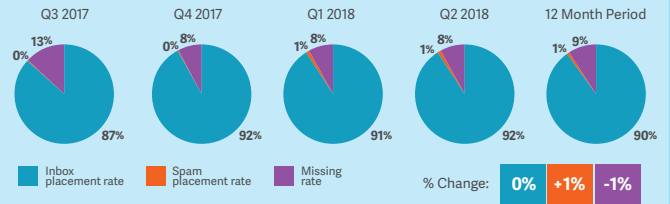
## JAPAN - INBOX PLACEMENT



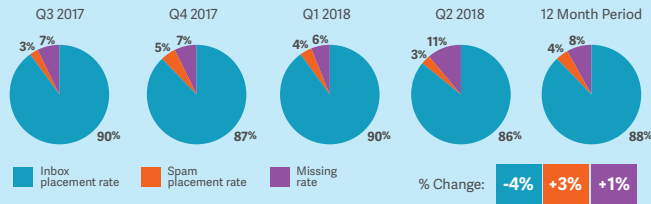
## CHINA - INBOX PLACEMENT



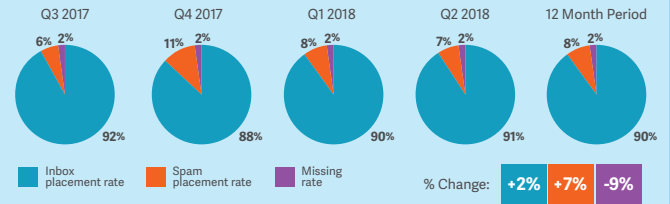
## NEW ZEALAND - INBOX PLACEMENT



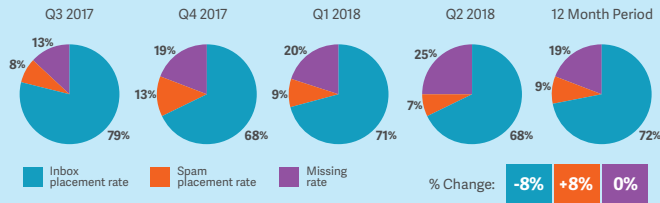
## HONG KONG - INBOX PLACEMENT



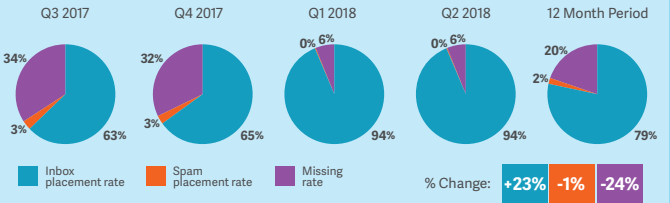
## SINGAPORE - INBOX PLACEMENT



## INDIA - INBOX PLACEMENT



## SOUTH KOREA - INBOX PLACEMENT



## CAPTURING SUBSCRIBER LEVEL DELIVERABILITY

Mailbox providers' filtering algorithms are constantly improving. In order to ensure that their users are receiving the best experience, mailbox providers are increasingly considering subscriber behavior in their placement decisions. [By tracking how subscribers interact with email](#) and how deliverability changes as a result, marketers can uncover the cause of engagement based deliverability issues.

These next two sections are calculated using panel data. While reviewing these benchmarks, remember:

1. This data only represents emails accepted at the gateway. Messages that are blocked or blacklisted aren't included. Because of this, these numbers will be higher than the results calculated using seed data, reported earlier in this whitepaper.
2. Panel data represents only the top four webmail providers: Microsoft, Google, Yahoo, and AOL.

















## GLOBAL INBOX PLACEMENT AT THE TOP FOUR MAILBOX PROVIDERS

Marketers are successfully reaching mailboxes at AOL, Gmail, and Yahoo, seeing inbox placement rates above 90 every quarter. Outlook was a challenging mailbox for marketers to reach with a period average of just 75 percent.

	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Period Average
<b>AOL</b>	96%	97%	95%	97%	96%
<b>Gmail</b>	91%	92%	92%	93%	92%
<b>Outlook</b>	78%	77%	66%	75%	75%
<b>Yahoo</b>	91%	92%	93%	92%	92%

## INBOX PLACEMENT RATE BY INDUSTRY

Across the board, every industry saw an increase in inbox placement compared to the previous period. Distribution & manufacturing and banking & finance had the highest inbox placement averages for the period at 96 percent, while education/nonprofit/government had the lowest inbox placement rate at 83 percent. The automotive industry saw the largest increase in inbox placement with 88 percent of email reaching subscribers' inboxes—an increase of 11 percentage points over the previous period.

INDUSTRY	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Period Average	Change from last period	Previous Period
 Apparel	93%	93%	92%	93%	93%	+8%	85%
 Automotive	89%	90%	87%	88%	88%	+11%	77%
 Banking & Finance	96%	96%	95%	96%	96%	+2%	94%
 Business & Marketing	87%	87%	88%	88%	88%	+6%	82%
 Computers & Electronics	93%	92%	94%	94%	93%	+7%	86%
 Deals & Rewards	91%	92%	90%	92%	91%	+5%	86%
 Distribution & Manufacturing	94%	96%	96%	96%	96%	+4%	92%
 Education/Nonprofit/Government	87%	85%	82%	81%	83%	+7%	76%
 Food & Drug	90%	88%	90%	94%	91%	+6%	85%
 Health & Beauty	91%	90%	90%	91%	90%	+7%	83%
 Household & Home Improvement	91%	93%	93%	92%	92%	+4%	88%
 Media & Entertainment	89%	90%	88%	88%	88%	+6%	82%
 Social & Dating	86%	87%	85%	83%	85%	+8%	77%
 Technology/Software/Internet	91%	91%	91%	91%	91%	+6%	85%
 Travel	94%	94%	93%	93%	94%	+4%	90%
 <b>Total</b>	<b>90%</b>	<b>91%</b>	<b>90%</b>	<b>91%</b>	<b>91%</b>	<b>+6%</b>	<b>85%</b>

# METHODOLOGY



Return Path conducted this study using a representative sample of more than 2 billion promotional email messages sent to consumers around the world between July 2017 and June 2018. Global and regional statistics are based on performance across more than 140 mailbox providers in North America, South America, Europe, and Asia-Pacific regions. Country and industry statistics are based on a subset of senders whose locations and industry classifications are identifiable.

Return Path panel data is captured from monitored email accounts controlled by real subscribers to sample user-initiated engagement based filtering decisions by mailbox providers. Panel 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.

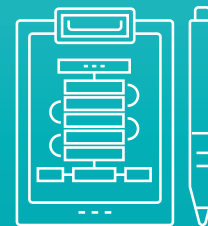
Industry results are based on global panel data consisting of more than 17,000 commercial senders, 2 million consumer panelists, and 2 billion commercial email messages sent to Microsoft, Google, Yahoo, and AOL users in the same time period.

## **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 panel data:**

Information captured from monitored email accounts controlled by real subscribers to sample user-initiated and engagement based filtering decisions by mailbox providers. Panel 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.

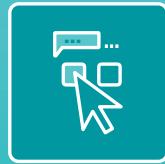




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