

2019 SENDER SCORE BENCHMARK



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INTRODUCTION

Reaching the inbox is always a challenge. While marketers might feel that mailbox providers are being unreasonably strict, there is a reason for this. There is a lot of bad email being sent. Last year alone saw over 600 billion emails from spammers.

Mailbox providers have these strict protocols in place not to block legitimate senders, but to keep spammers and harmful content out of their users' inboxes. To identify the "good" from the "bad," mailbox providers judge an incoming sender's reputation when determining what email to allow or block from their inboxes. A sender's reputation is calculated using a variety of metrics, and each mailbox provider has its own formula to judge whether or not to accept incoming mail and where to filter it.

Marketers who are aiming for the inbox use Return Path's Sender Score to discover and track their sender reputation and learn how mailbox providers perceive their messages. Similar to a credit score, Sender Score is an evaluation of your sending practices compared to other senders to determine the quality of your messages and your email program. A marketer's Sender Score is expressed as a number between 0 and 100. Sender Score uses data points and reputation formulas similar to what mailbox providers use to give a relatively accurate representation of how mailbox providers view your email.

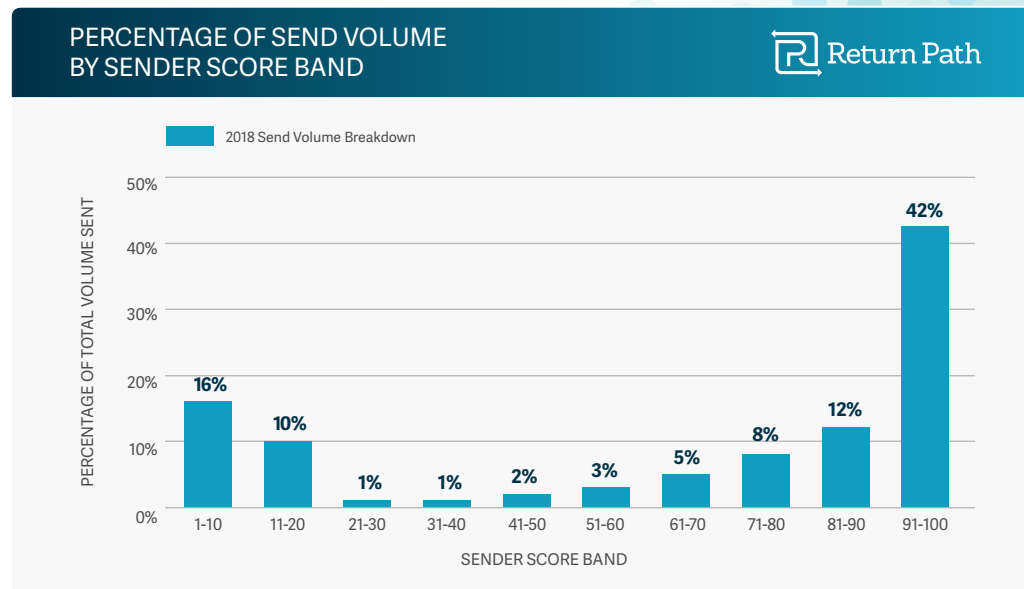
In this report, we will discuss some of the factors that go into both Sender Score and mailbox providers' reputation calculations. In addition, we'll take a look at the impact these elements on your sending reputation, and how your reputation affects your deliverability.

To get the most out of this report, look up your [Sender Score](#) and use it to understand how mailbox providers are viewing your program.



THE STATE OF EMAIL REPUTATION

The quality of email programs has improved dramatically since our first Sender Score Benchmark in 2012 when botnets ruled and spammed the world. At that time, a staggering 60 percent of messages sent came from IP addresses with a Sender Score below 11. Today, only 16 percent of email scored below 11. While the drop in spam over the last eight years can mostly be attributed to the takedown of botnets, email marketers are also more aware of reputational risks and have more tools and solutions at their disposal to monitor and solve reputation issues.



METRICS THAT INFLUENCE SENDER REPUTATION

While each mailbox provider has its own formula which assigns different weights and values to various components of sender reputation, the factors they include are generally the same. Three key metrics that factor into sender reputation are complaint rate, unknown user rate, and spam trap count.

These metrics are included in reputation calculations because they provide insight into a sender's mailing practices. Those with low complaint and unknown rates and few spam trap hits are seen as reputable senders and receive a higher reputation score. As a result, inbox placement tends to be higher for these senders.

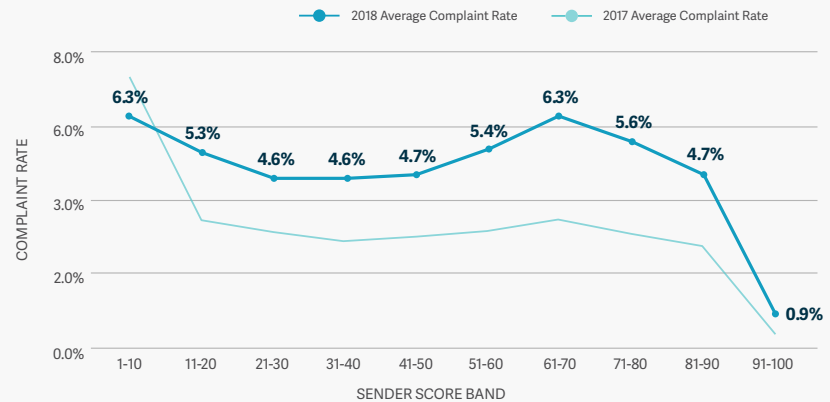
COMPLAINTS

A complaint is generated when a mailbox user marks a message as junk or spam. A high complaint rate signals to mailbox providers that users perceive the message as spam or abuse, and helps the mailbox provider to automatically detect similar spam or abuse messages in the future.

Senders with a Sender Score above 90 were the only ones who managed to maintain a complaint rate below one percent. Those with a Sender Score between zero to 90 had a sharp increase in average complaint rate, ranging from 4.6 percent to 6.3 percent.

Average complaint rates more than doubled from last year for senders scoring between 11 and 100.

AVERAGE COMPLAINT RATE BY SENDER SCORE BAND



Complaints can originate from various sources for a variety of reasons. Read the [Marketer's Guide to Subscriber Complaints](#) to understand where complaints are coming from and why.

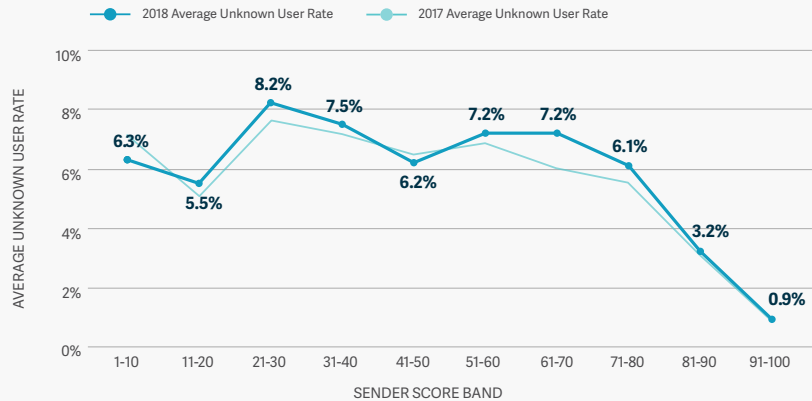
METRICS THAT INFLUENCE SENDER REPUTATION continued

UNKNOWN USERS

An unknown user is a type of bounced message indicating that an email address doesn't exist at the receiving mailbox provider. Mailbox providers return a hard bounce code (5xx) indicating when email is sent to an unknown user. Senders who not only retain unknown users but send to a high percentage of them are perceived by mailbox providers as suspicious or having poor list hygiene practices. A high unknown user rate can cause your messages to be throttled, delivered to the spam folder, or blocked.

Senders with Sender Scores above 90 tend to keep relatively clean lists, with average unknown user rates of one percent. The next highest band (81-90) saw an average of three percent, with the rest (zero-80) maintaining an average between six and eight percent.

AVERAGE UNKNOWN USER RATE BY SENDER SCORE BAND



In most cases, marketers should immediately remove addresses that return a 5xx hard bounce code. To learn about the different types of bounces and how to process them, read the [Email Marketer's Guide to Bounce Processing](#).



METRICS THAT INFLUENCE SENDER REPUTATION continued

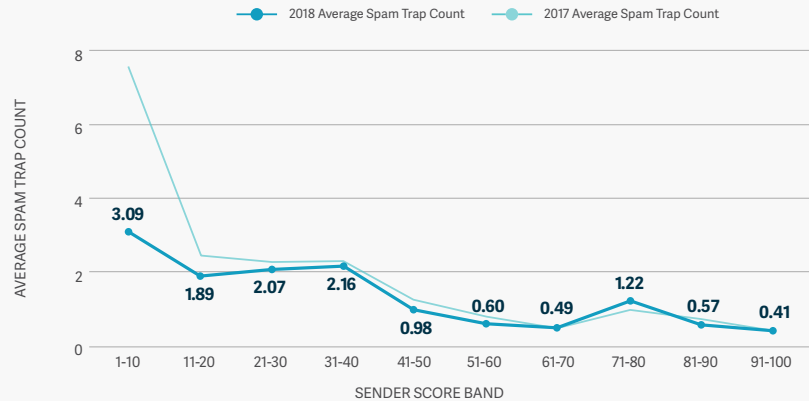
SPAM TRAPS

Spam traps are decoy email addresses used to identify spammers. There are two types of spam traps:

- Pristine spam traps are decoy accounts that aren't owned by a real person and therefore never subscribe to mailing lists. Mail received at these accounts indicates the email address was acquired without permission, and may also indicate it was acquired through illegal methods such as harvesting.
- Recycled traps are addresses that were once held by a user, but have been abandoned and converted into spam traps.

Senders with a Sender Score above 90 were the most successful at keeping their lists clean with an average of 0.41 spam traps. Senders scoring 50 and below saw an average of around one or more spam trap hits, with those scoring below 11 seeing an average of 3.09 spam traps.

AVERAGE SPAM TRAP COUNT BY SENDER SCORE BAND

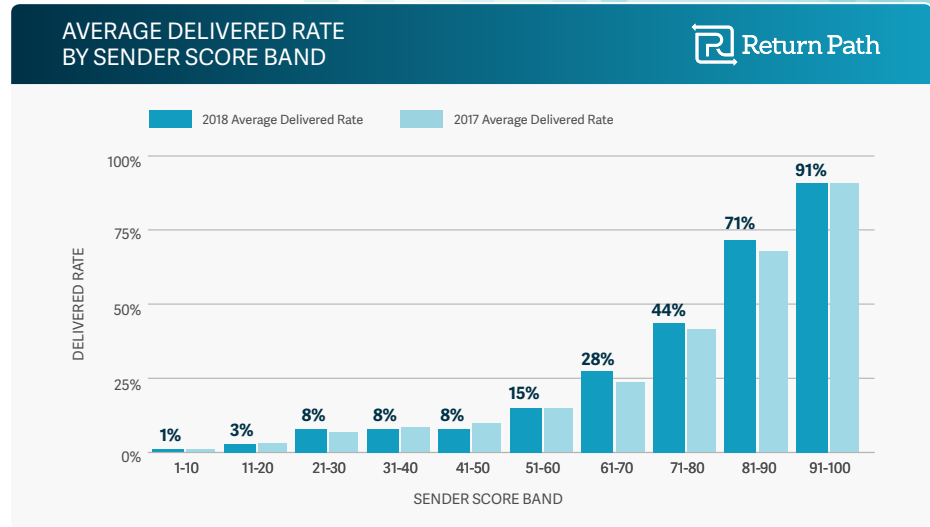


To keep your program safe, make sure you understand the different types of spam traps and how to identify and remove them. Also, consider investing in a list validation service to help you identify and remove traps on your list and avoid acquiring new ones.

AVERAGE DELIVERED RATE BY SENDER SCORE BRAND

A sender's delivered rate measures the percentage of messages that aren't bounced or rejected by mailbox providers' gateway filters. The delivered rate does not show which folder the messages were then delivered to—primarily the inbox or the spam folder—but it does factor out any messages that have no hope of being seen by subscribers.

In 2018, senders scoring above 90 had an average delivered rate of 91 percent. Those who fell one band below (81-90) saw less mail delivered, with an average of 71 percent. The remaining senders—those scoring between zero and 80—saw more than half of their messages rejected at the gateway. Those scoring above 60 also saw a slight year-over-year increase in delivered rates.

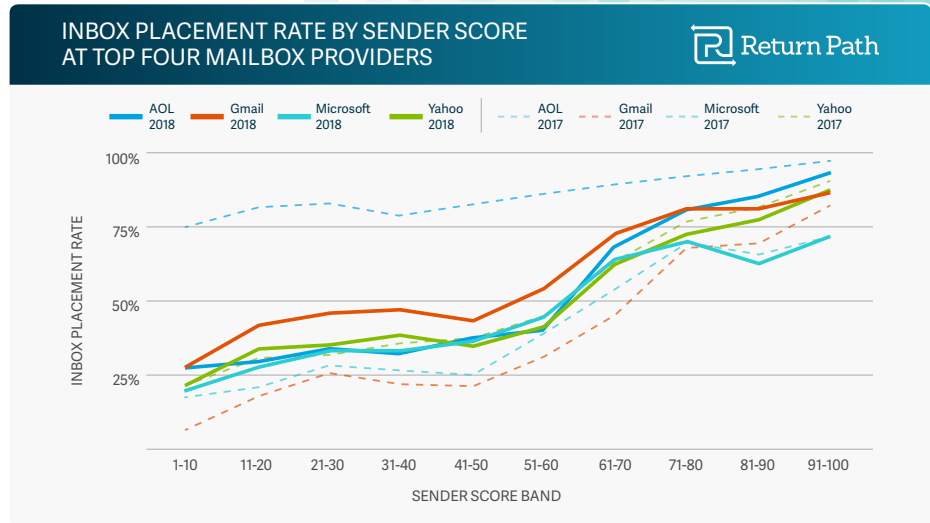


INBOX PLACEMENT AT THE TOP FOUR MAILBOX PROVIDERS

After passing the gateway (the delivered rate shown on the previous page), emails are then subjected to additional filters. These filters—including both reputation-based filtering and engagement-based filtering—determine which folder each message is finally delivered to.

As discussed previously, each mailbox provider has its own unique formula for evaluating reputation. Although, the factors that weigh into this analysis are generally the same. As a result of the different formulas, senders may experience different inbox placement rates at different mailbox providers.

In the graph on the right, you can see the impact these different filtering formulas have on inbox placement rates at Gmail, Microsoft, Yahoo, and AOL. It's worth noting that each mailbox provider's inbox acceptance generally increases with a higher Sender Score and better sending practices.



INBOX PLACEMENT AT THE TOP FOUR MAILBOX PROVIDERS continued

Microsoft remained the hardest mailbox to reach in 2018 with even the best senders only reaching the inbox 72 percent of the time. Senders did see a slight increase in deliverability compared to the previous year with most bands seeing an increase in inbox placement rates.

Senders saw slightly higher inbox placement at Gmail, with the top senders managing an average inbox placement rate of 88 percent. Senders were more successful in reaching Gmail inboxes compared to the previous year, with increases ranging from seven to 27 percentage points.

At Yahoo, the top senders had an average inbox placement rate of 88 percent. However, most senders found reaching Yahoo inboxes harder compared to the prior year with decreases ranging between one and five percentage points.

AOL remained the easiest mailbox provider to reach, with the best senders achieving an average of 93 percent inbox placement—although deliverability at AOL changed dramatically year over the year. AOL, which was acquired by Verizon Media Group, migrated its email filtering to Yahoo (also owned by Verizon Media Group) over the summer and fall of 2018. With a new filtering system in place, inbox placement rates at AOL decreased by four to 56 percentage points.

The chart on the right shows that sender reputation filtering is still important in spam filtering algorithms. However, a high Sender Score on its own doesn't translate to higher inbox placement rates. Subscriber engagement, a mailbox provider's own reputation calculations, and the content in the incoming message—none of which are included in Sender Score calculations—all factor into each mailbox provider's final filtering determinations.

INBOX PLACEMENT RATE BY SENDER SCORE AT TOP FOUR MAILBOX PROVIDERS



SENDER SCORE BAND	1-10	11-20	21-30	31-40	41-50	51-60	61-70	71-80	81-90	91-100
AOL 2018	26%	28%	34%	34%	37%	43%	68%	79%	85%	93%
AOL 2017	75%	83%	84%	80%	84%	87%	90%	92%	95%	97%
Gmail 2018	26%	41%	46%	47%	44%	54%	73%	79%	80%	88%
Gmail 2017	8%	18%	26%	22%	22%	31%	46%	67%	69%	81%
Microsoft 2018	19%	26%	34%	34%	37%	45%	63%	70%	64%	72%
Microsoft 2017	17%	21%	27%	26%	25%	38%	53%	69%	66%	72%
Yahoo 2018	22%	31%	36%	39%	36%	43%	62%	72%	76%	88%
Yahoo 2017	21%	32%	33%	36%	38%	45%	63%	76%	81%	91%

AVERAGE SENDER SCORE AND INBOX PLACEMENT RATE BY INDUSTRY

AVERAGE SENDER SCORE AND INBOX PLACEMENT RATE BY INDUSTRY				
Return Path				
INDUSTRY	2018 AVERAGE INBOX PLACEMENT RATE	2018 AVERAGE SENDER SCORE	2017 AVERAGE SENDER SCORE	DIFFERENCE
APPAREL & ACCESSORIES	87%	95	95	0
AUTOMOTIVE	86%	94	94	0
BANKING & FINANCE	91%	93	92	1
BUSINESS & MARKETING	82%	95	93	2
COMPUTERS & ELECTRONICS	89%	94	94	0
DEALS & REWARDS	86%	96	94	2
DISTRIBUTION & MANUFACTURING	89%	92	90	2
EDUCATION/NONPROFIT/GOVERNMENT	81%	93	93	0
FLOWERS & GIFTS	83%	95	95	0
FOOD & DRUG	88%	95	94	1
GENERAL MERCHANDISE	91%	95	93	2
HEALTH & BEAUTY	81%	88	90	-2
HOUSEHOLD & HOME IMPROVEMENT	87%	95	94	1
INSURANCE	91%	96	94	2
JOBBS	83%	93	93	0
KIDS & BABIES	86%	95	95	0
MEDIA & ENTERTAINMENT	85%	92	92	0
OFFICE SUPPLIES	87%	93	93	0
PETS	87%	96	94	2
REAL ESTATE	84%	94	93	1
SERVICE	89%	94	93	1
SOCIAL & DATING	83%	95	92	3
SPORTING GOODS	84%	96	95	1
TECHNOLOGY/SOFTWARE/INTERNET	87%	93	91	2
TELECOMMUNICATION	79%	75	81	-6
TOYS/HOBBIES/CRAFTS	82%	84	89	-5
TRAVEL	89%	94	93	1

To help marketers evaluate their own email program against their peers, we dug into Sender Score performance by industry. The chart on this page shows the average Sender Score and inbox placement rate for more than 17,000 commercial senders, broken out by industry. As only legitimate commercial senders are included, these numbers provide a relatively accurate reflection of how each industry is performing.

In 2018, most industries had average Sender Scores above 90, with deals and rewards, insurance, and pets achieving the highest average at 96. Telecommunication companies struggled with reputation, posting the lowest average Sender Score at 76.

Most industries saw either no change or a slight increase in average Sender Score year over year. Health & beauty, telecommunication, and toys/hobbies/gifts were the only industries to have a decline in Sender Score, with telecommunications seeing the greatest decrease of six points.



Find more information about how to reach inboxes at the top mailbox providers in the [Marketers Guide to Gmail, Outlook.com, and Yahoo.](#)

BUILDING AND MAINTAINING A STRONG REPUTATION

As you can see, your reputation is a strong factor in your ability to reach the inbox. However, many elements can cause your reputation, and (as a result) your deliverability, to decline.

To build and maintain a strong reputation, focus on the following:



Keep your list clean

The quality of your list is a big factor for your reputation. Make sure you are routinely checking your list for unengaged users who may be spam traps in disguise. Run your list through a list validation service to make sure all your emails are owned by real people and check every new email you add to your list.



Know all the blacklists and make sure you are not listed

Blacklisting is another factor to mailbox providers filtering formulas and each mailbox provider uses different ones to different degrees. Make sure you know which [blacklists are available](#) and how to get delisted. And routinely check that your IP address is not [listed anywhere](#).



Sign up for feedback loops

Feedback loops help marketers identify when subscribers complain about their messages, allowing them to resolve the complaint and avoid future ones from the same user. Most mailbox providers offer their own feedback loop services. You can learn more about the different types of feedback loops and how to set them up [here](#).



Check Sender Score

Before you send a campaign, check your Sender Score. Your Sender Score can fluctuate based on the results of your recent activity. Rather than find out after you send your campaign that you have a problem, check your latest reputation score and resolve any issues. Once your Sender Score has improved, your messages are more likely to reach subscribers.

METHODOLOGY

To conduct this study, Return Path analyzed more than 4 trillion messages sent during 2018 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, and the Return Path Consumer Network to identify the Sender Score and inbox placement rates of more than 17,000 commercial senders. Data used for this report is aggregated and anonymized, and is not limited to Return Path clients. Sender Score is a free reputation calculation service and is available at senderscore.org.



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