

2020

EMAIL DELIVERABILITY BENCHMARK

ANALYSIS OF WORLDWIDE INBOX
AND SPAM PLACEMENT RATES

2020 EMAIL DELIVERABILITY BENCHMARK

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INTRODUCTION

To give their mailbox users the best possible experience, mailbox providers have strong restrictions in place on what mail to accept into their inboxes. Because of this high threshold for acceptance, one in six messages does not reach the inbox. In addition, more than half of the messages that don't reach the inbox are not even landing in the spam folder— and are missing from subscribers' email accounts, never to be seen or interacted with.

What's even more concerning, is many marketers are unaware their messages are missing the inbox. Misconceptions about metrics and lack of data lead many marketers to fall below this average. Without even knowing they have deliverability issues, marketers will continue to miss out on building valuable relationships and achieving the highest possible ROI.

In this year's annual benchmark report, we take a look at what deliverability means, where email can get delivered, and how to measure inbox placement. We also explore the global, regional, and country inbox placement results for all of 2019 and compare it to the previous year.



What is deliverability?

Deliverability is a sender's ability to be delivered to the inbox. Your email program performance and ROI relies on your ability to reach the inbox. No matter how engaging your subject line is or enticing the offer, if the message doesn't reach the inbox, subscribers won't interact with it—costing you potential revenue.

Often, marketers rely on their delivered rate shown in their email marketing dashboards provided by their email service provider (ESP) to judge the performance of their deliverability. However, the term “delivered” can be misleading. Email, once sent, can be delivered to many different places inside a mailbox provider system. Delivered rate only measures the amount of email that was accepted and rejected by the mailbox provider due to things like invalid addresses and blacklistings. What your delivered rate doesn't tell you is if those messages landed in the inbox, the spam folder, or went missing.

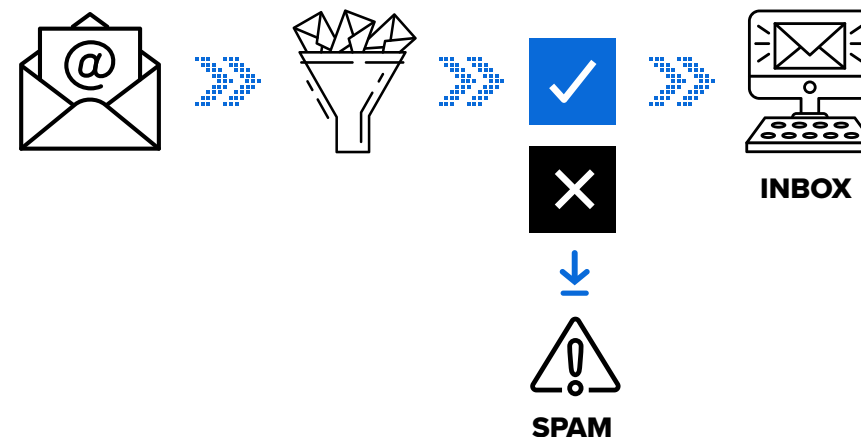
To find out if your messages arrived in the inbox, you need to look at your inbox placement rate. Your inbox placement rate is a more accurate and reliable way to measure deliverability and the success of an email campaign, since it measures how much email was delivered to the inbox versus email delivered to the spam folder in addition to messages rejected or blocked.

Did you know?

- **Inbox placement rate** is calculated as the number of emails delivered to the inbox out of total emails sent.
- **Spam placement rate** is calculated as the number of emails delivered to the spam folder out of total emails sent. Your spam placement rate shows the percentage of emails that were identified as unsolicited bulk email, or spam, by the receiving mailbox provider's spam filtering system.
- **Missing rate** is the percentage of mail that did not arrive in the inbox or spam folder but has been deferred for blocked by the mailbox provider.

What happens after you hit send?

After you hit send, there are many checks messages go through. To the right is a representation of the filters each message encounters on its journey. Email that is deemed malicious, untrustworthy, or has a poor reputation 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.



How do you measure deliverability?

In this benchmark, we use seed data to track and measure how email is delivered around the world. 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 from Validity, we have seed addresses at hundreds of mailbox providers and filters around the world. When marketers send emails 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. You can learn more about how seeds measure deliverability in our guide, ["What is a Seed?"](#)

The state of deliverability

Deliverability is not static. Shifts in the industry, adjustments to spam filtering algorithms, and changes in consumer preferences impacts inbox placement for not only one brand, but for the entire industry.

One big shift in the world over the last few years is the focus on data privacy. While GDPR came into effect in 2018, many other countries and US states have enacted or have proposed new data privacy laws since, causing marketers to reevaluate their data and marketing practices to comply.

Deliverability can also be impacted by mailbox providers who are constantly evaluating their current filtering equations to adapt to feedback from their users. For example, Gmail made some minor changes to their filtering in October of 2019 to which some marketers saw slight dips in their inbox placement, while others saw no change.

In addition to changes in the industry, any new campaign or tactic you try can have an influence on your deliverability. It's important to keep a pulse on what's happening both internally and globally that may influence your deliverability and overall performance.

In the following pages we report the average inbox placement, spam placement, and missing rates globally, by region, and by country. Take a look at the metrics and compare them against your own performance.

Note: Due to rounding, some placement calculations will be slightly over or under 100%

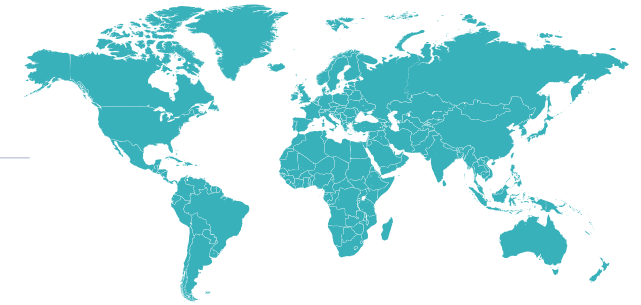


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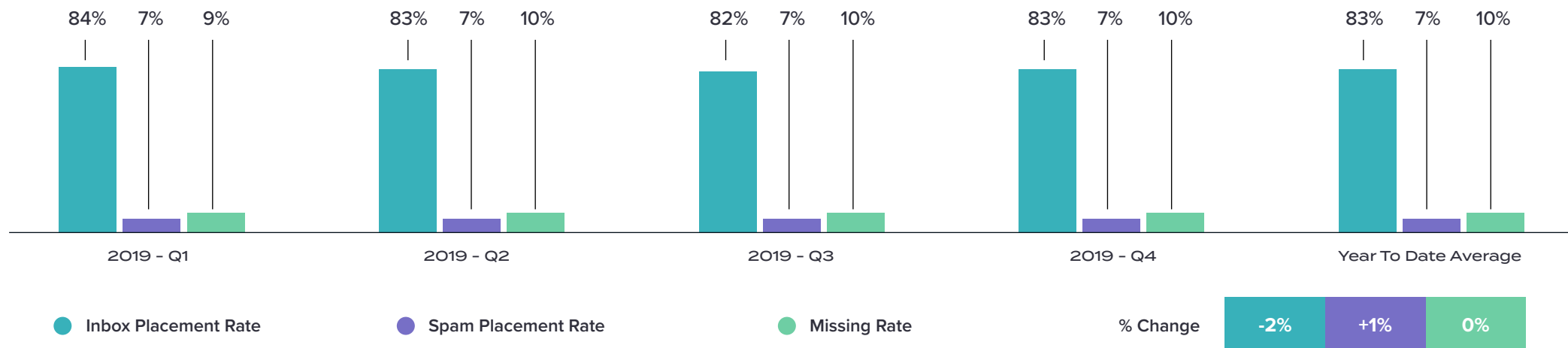
Global Inbox Placement

Globally, the average inbox placement rate was 83 percent in 2019—meaning one out of every six messages failed to reach the inbox. Global deliverability saw a slight decline of two percentage points from the 2018 average of 85 percent.

GLOBAL INBOX PLACEMENT



GLOBAL - INBOX PLACEMENT



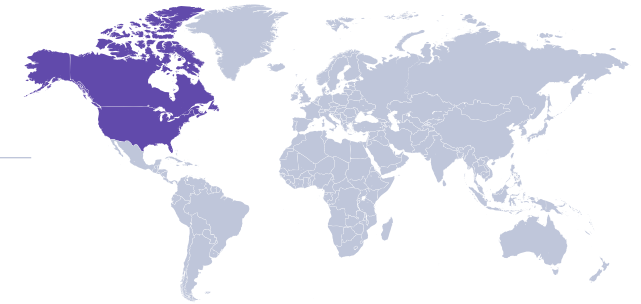
2020 EMAIL DELIVERABILITY BENCHMARK

Inbox Placement In North America

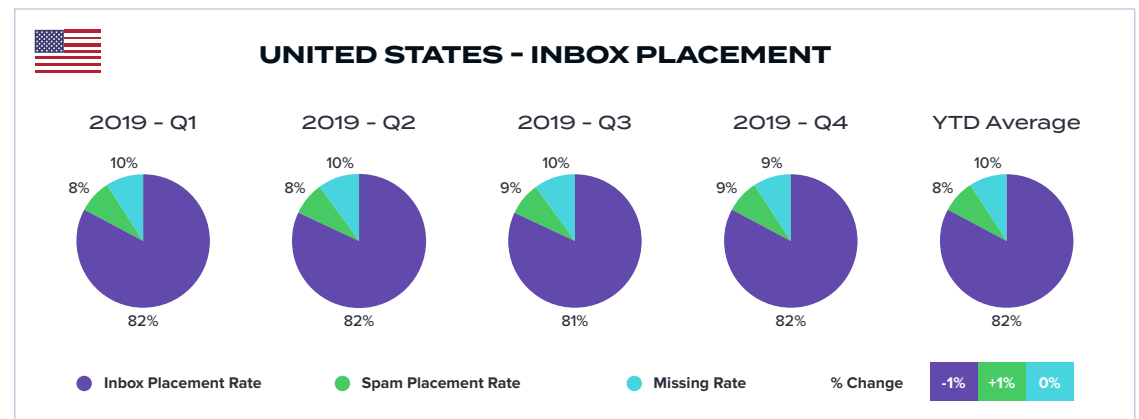
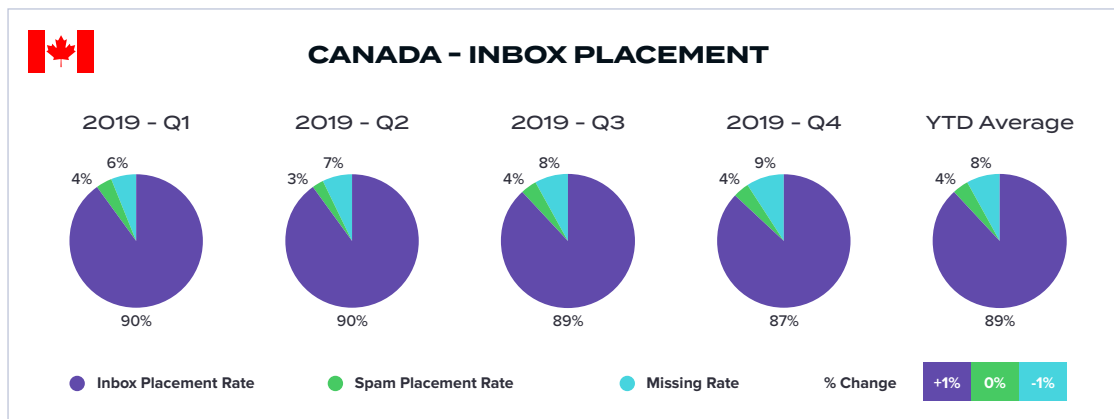
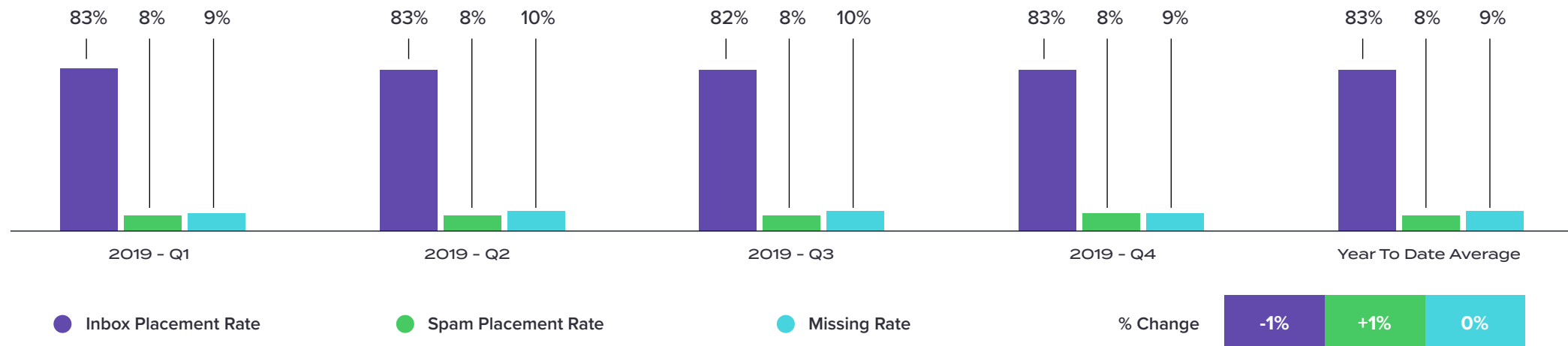
Deliverability to North American inboxes was equal to the global average in 2019, at 83 percent. United States inboxes saw an average of 82 percent inbox placement in 2019, while marketers sending to Canadian inboxes exceeded the global and regional average with an inbox placement rate of 89 percent.



INBOX PLACEMENT IN NORTH AMERICA



NORTH AMERICA - INBOX PLACEMENT



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Inbox Placement In Latin America

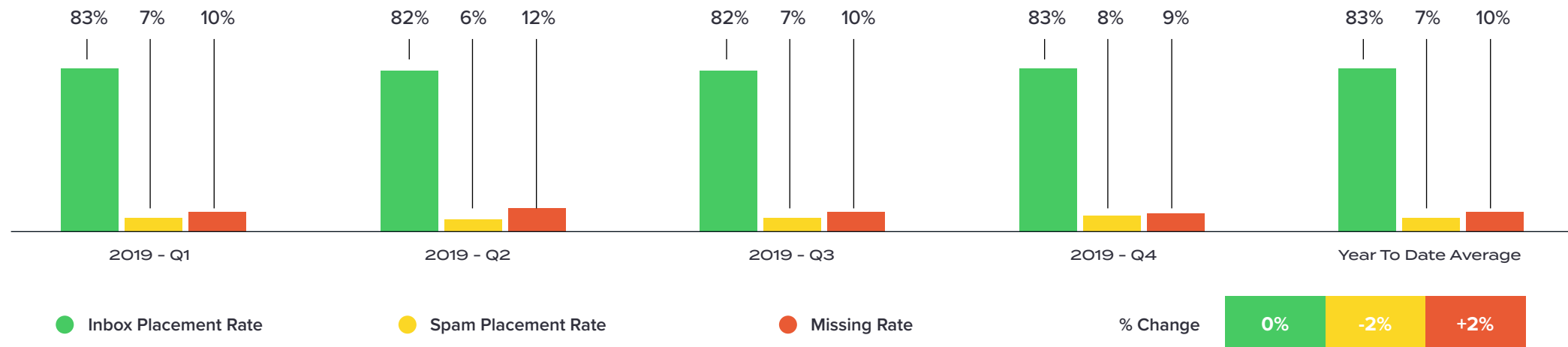
Like their northern counterpart, inbox placement for countries in Latin America matched the global average at 83 percent. Argentina led the region with an average inbox placement rate of 89 percent, while Brazil saw just four out of five messages reach the inbox (81 percent). Overall inbox placement in Latin America saw no change year-over-year. Argentina and Brazil saw slight increases in inbox placement, while Mexico saw a drop in deliverability of five percentage points.



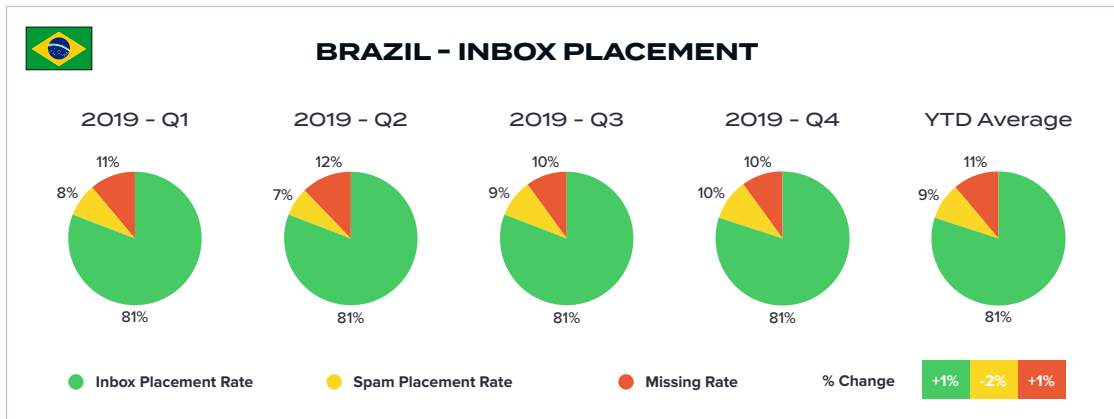
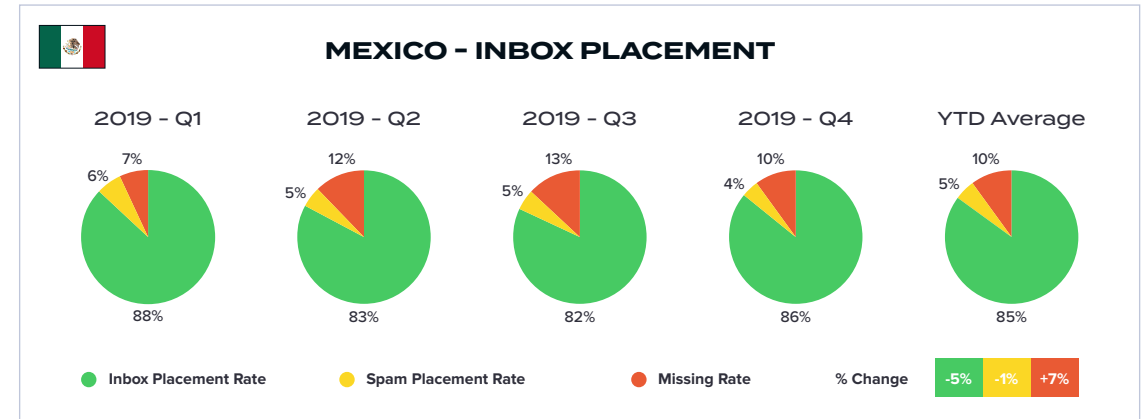
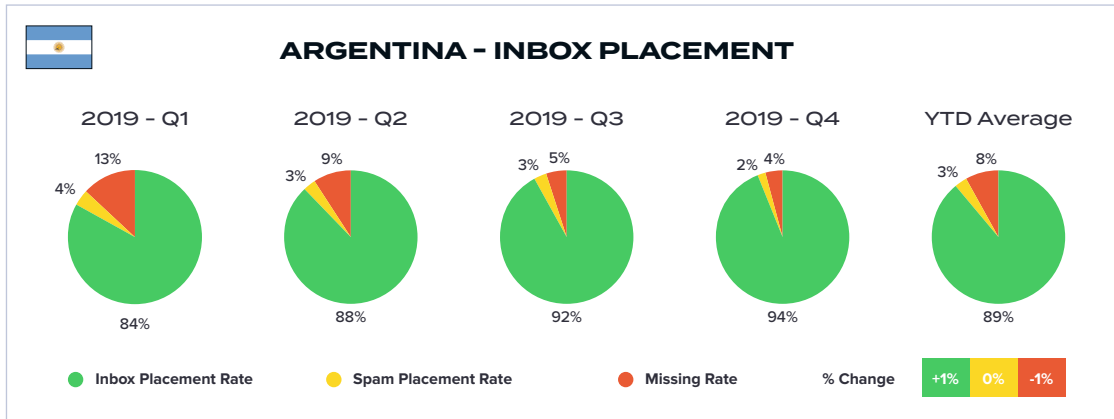
INBOX PLACEMENT IN LATIN AMERICA



LATIN AMERICA - INBOX PLACEMENT



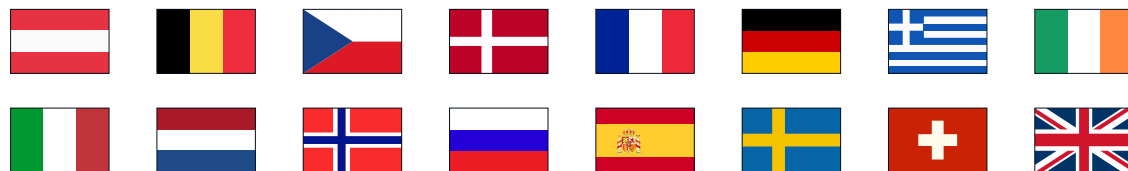
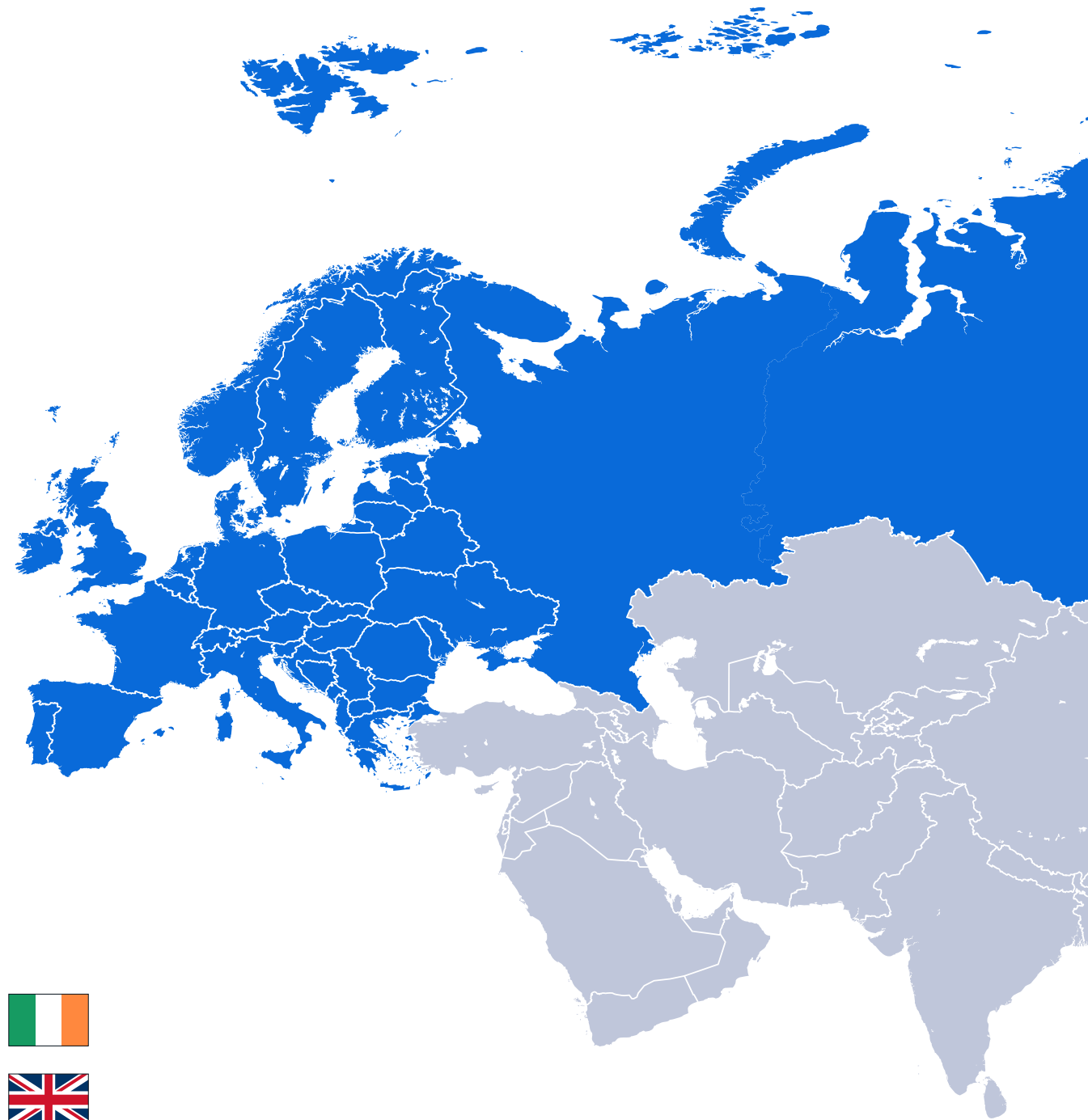
INBOX PLACEMENT IN LATIN AMERICA



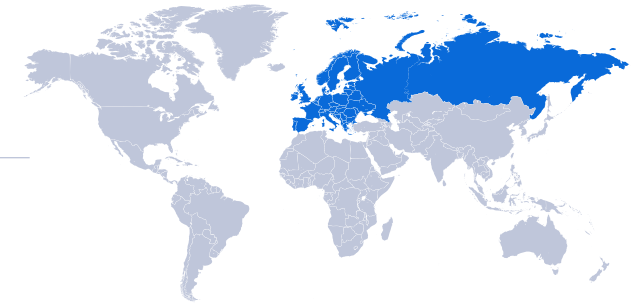
Inbox Placement In Europe

Deliverability to European mailboxes fell slightly from the previous year to an average inbox placement rate of 84 percent—just above the global average. Marketers sending to subscribers in Belgium and the Czech Republic had Europe’s highest inbox placement at 92 percent. One quarter of messages sent to German mailboxes failed to reach consumers, while messages to Swiss subscribers saw an inbox placement of just 67 percent.

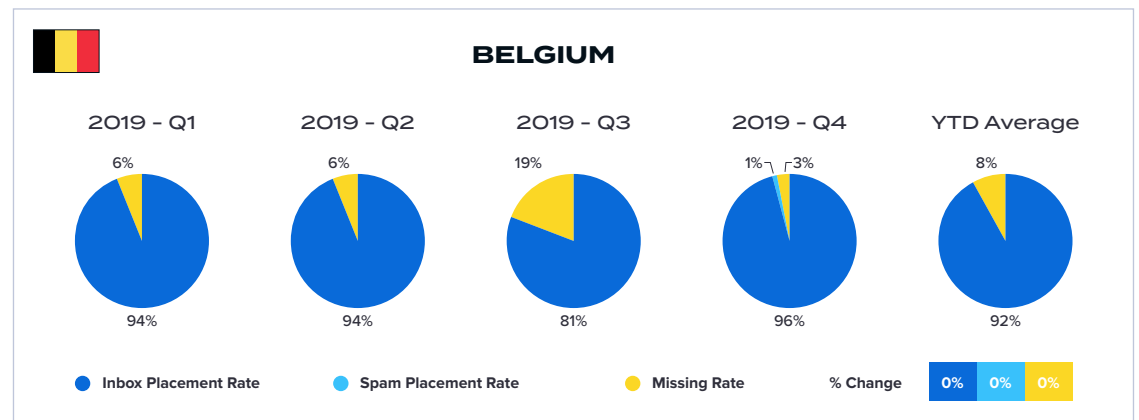
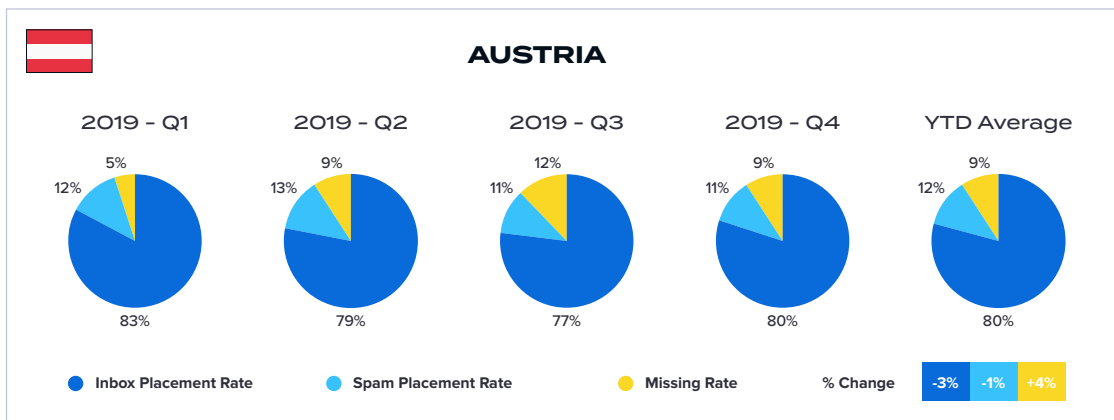
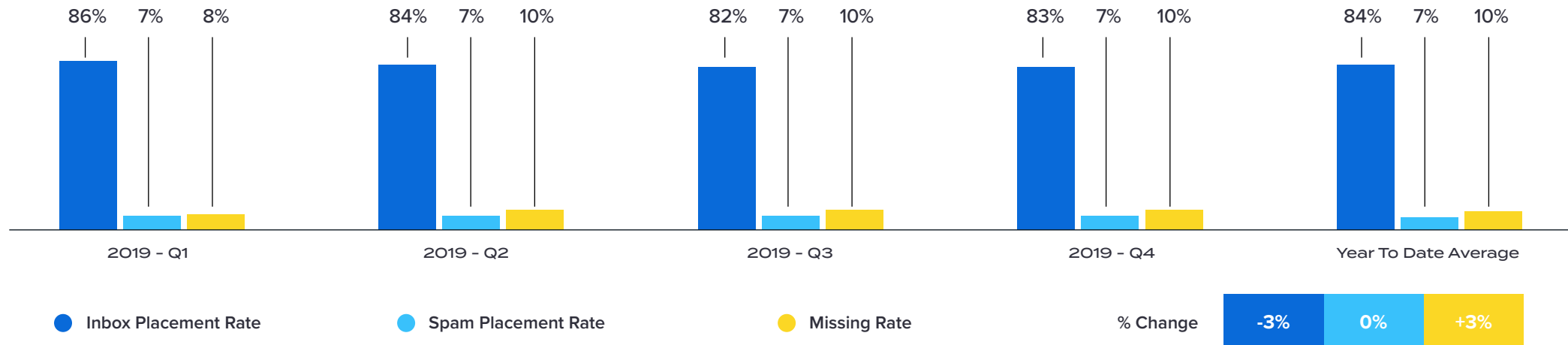
The Czech Republic and the Netherlands were the only European countries to see an increase in deliverability compared to the previous year (12 percentage points and three percentage points, respectively). Russia and Ireland saw the largest declines in inbox placement, down seven percentage points compared to the previous year.



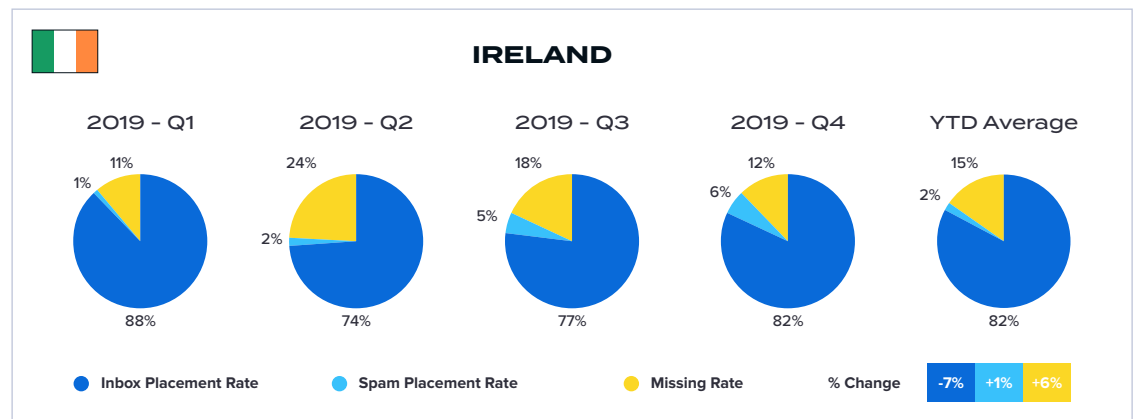
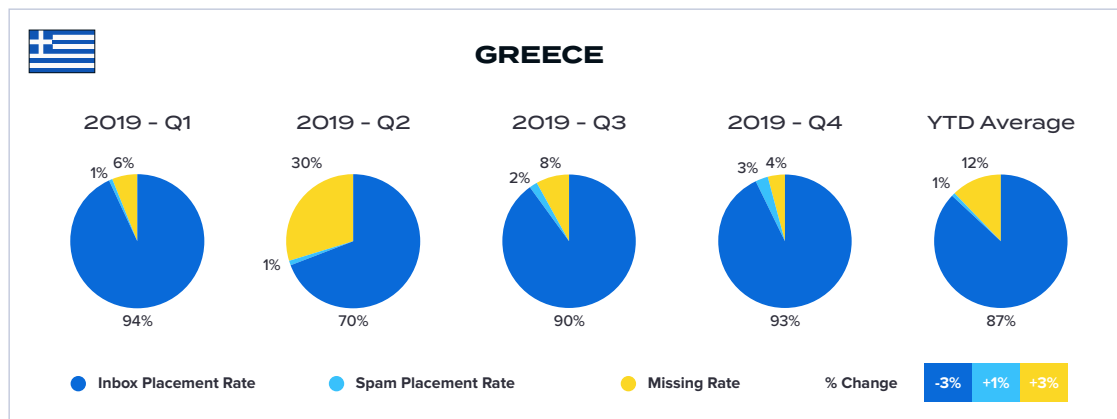
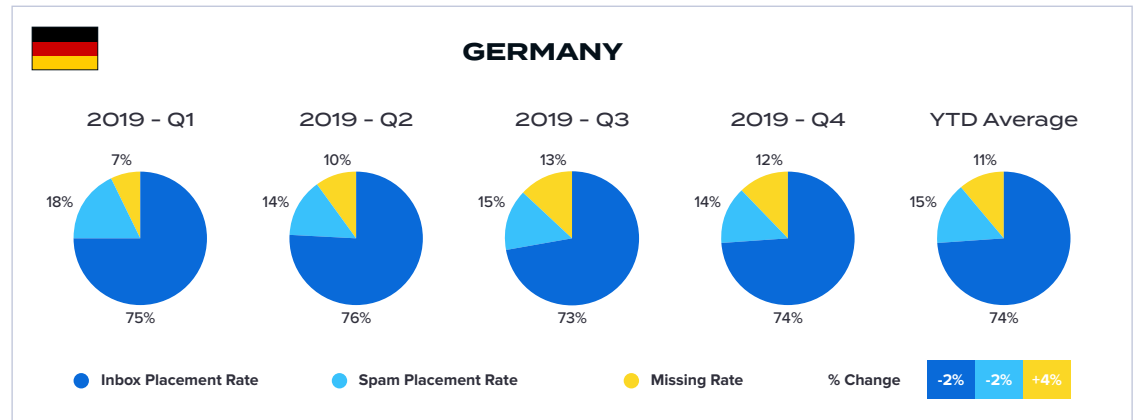
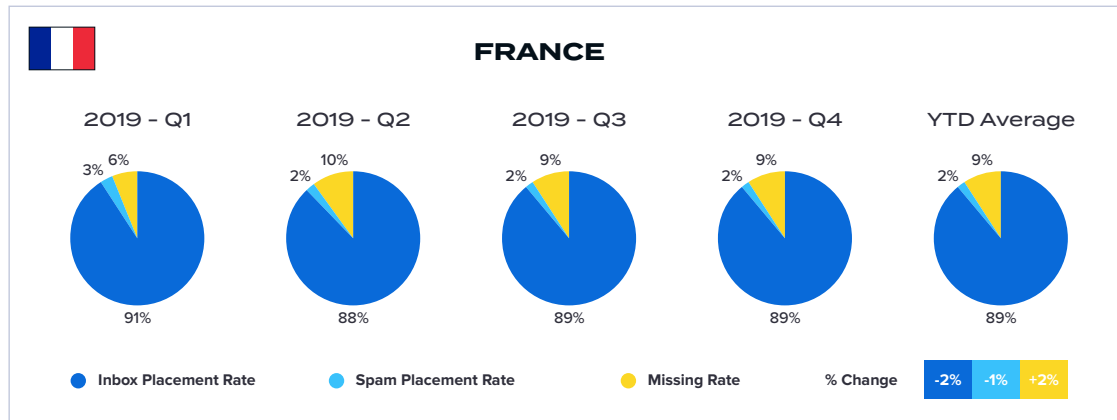
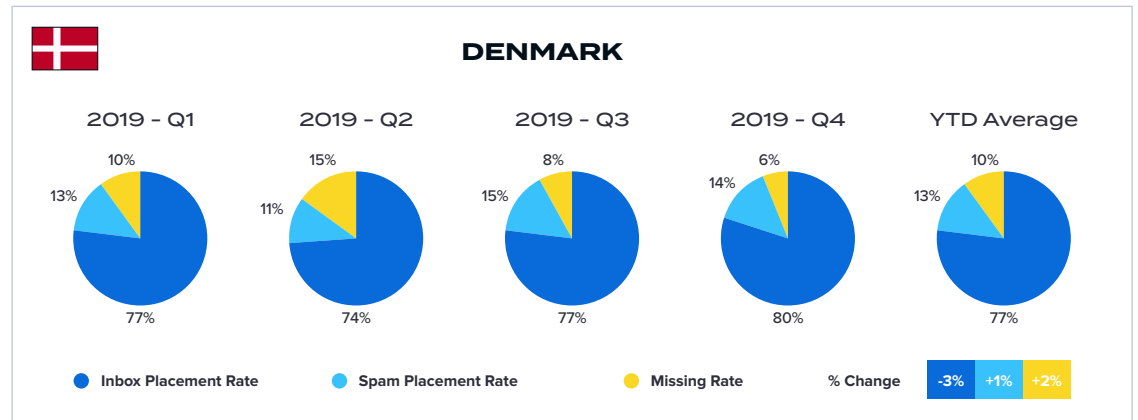
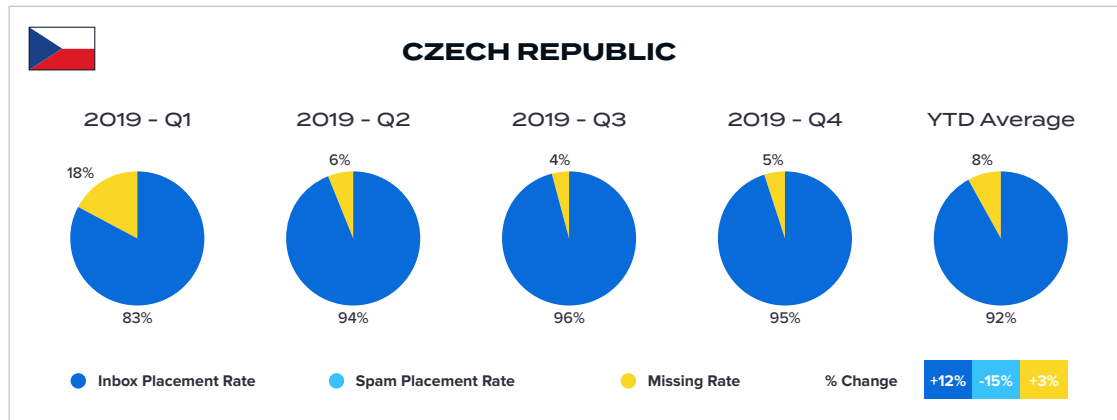
INBOX PLACEMENT IN EUROPE



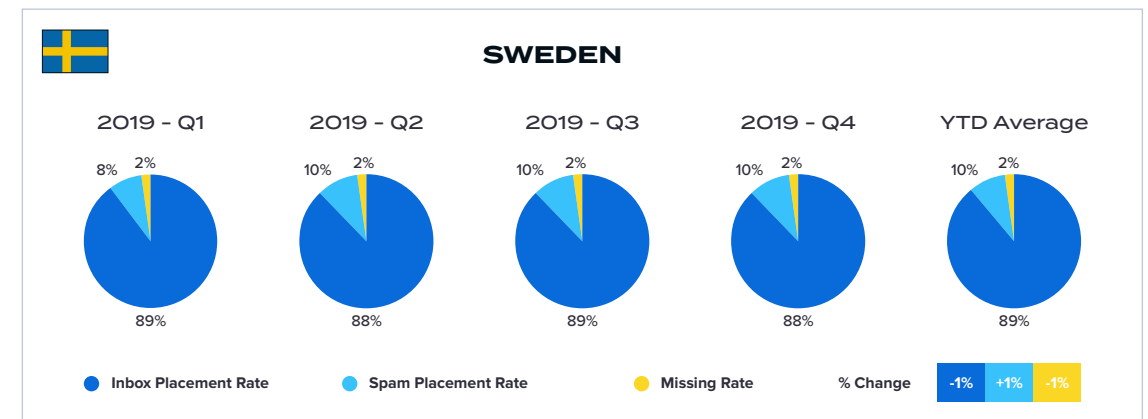
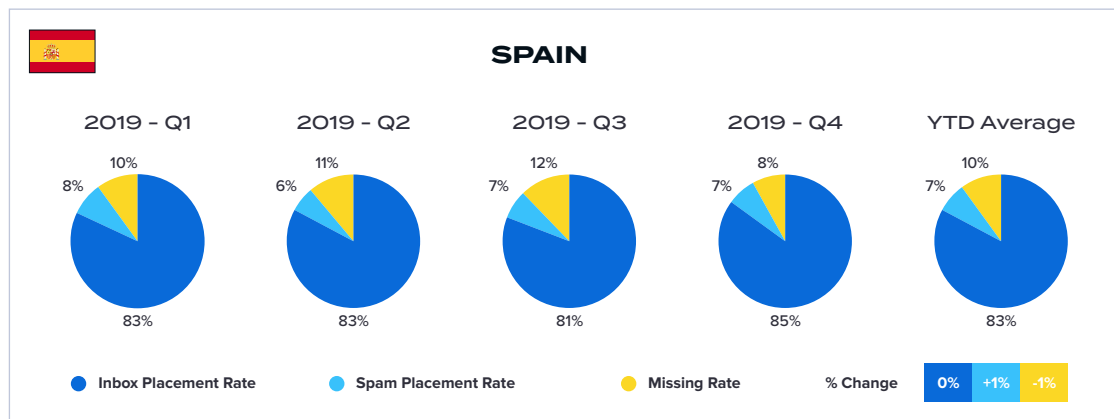
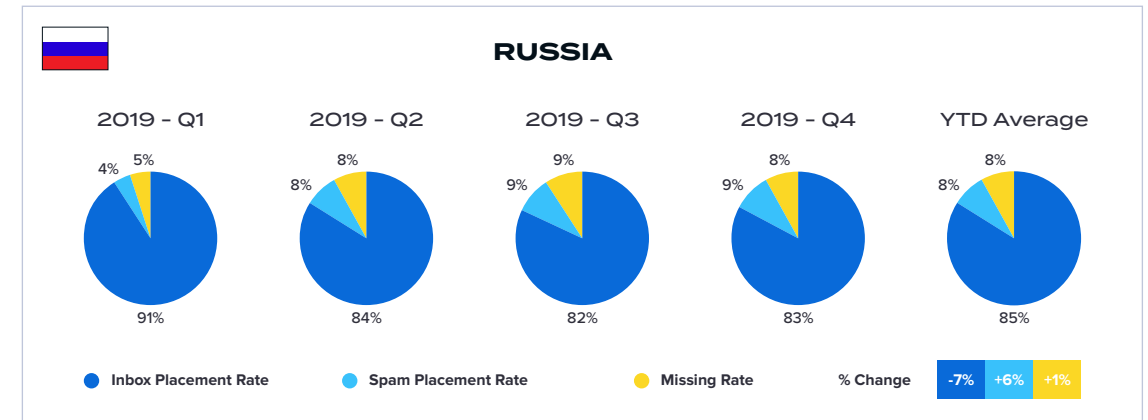
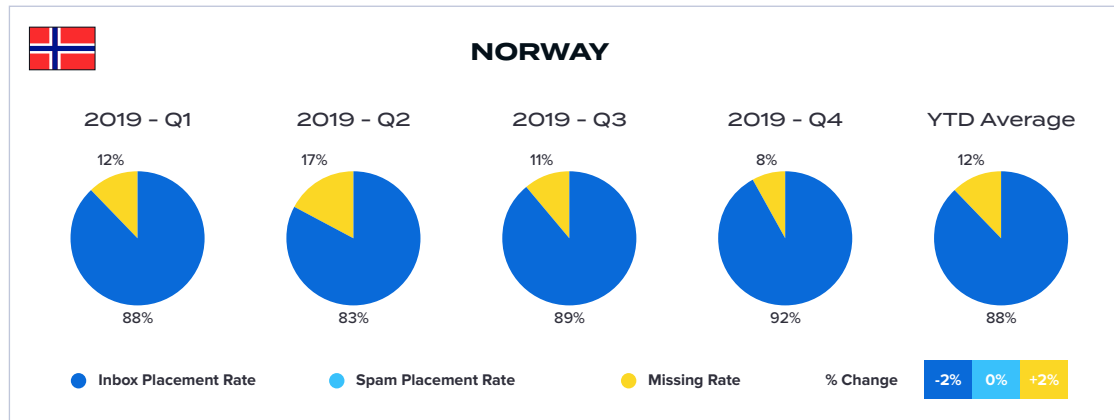
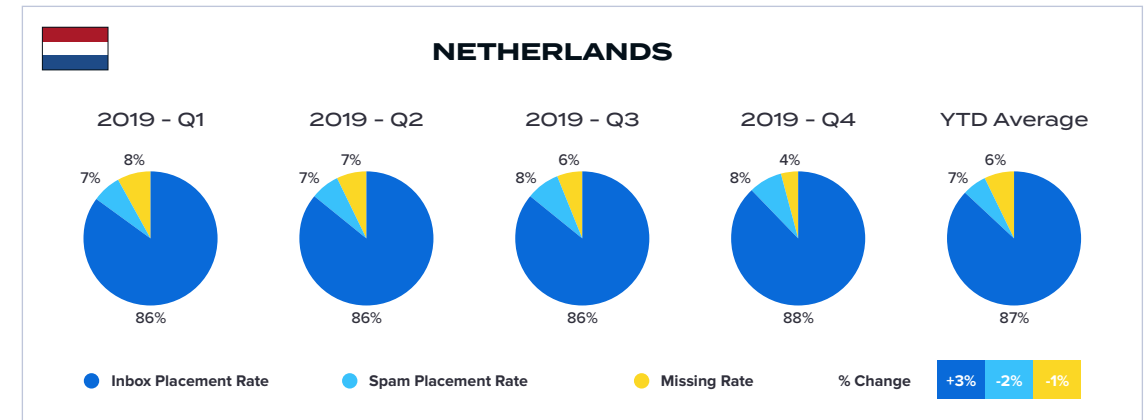
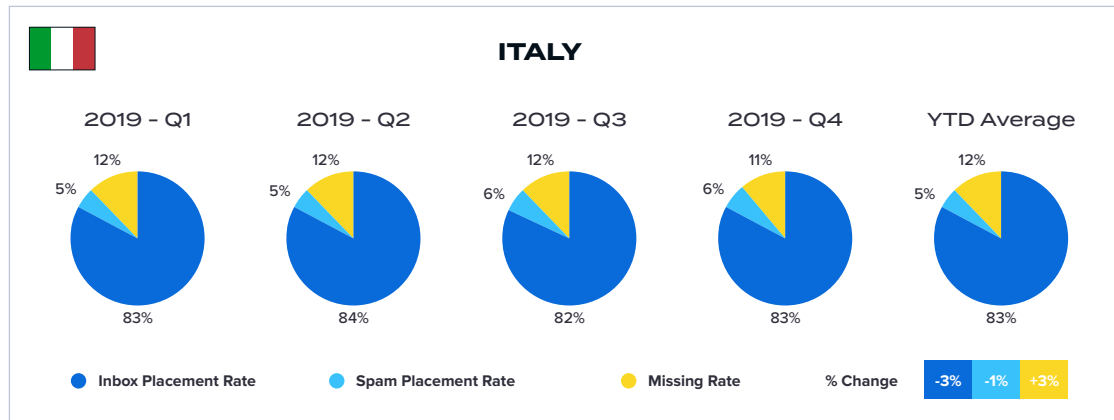
EUROPE - INBOX PLACEMENT



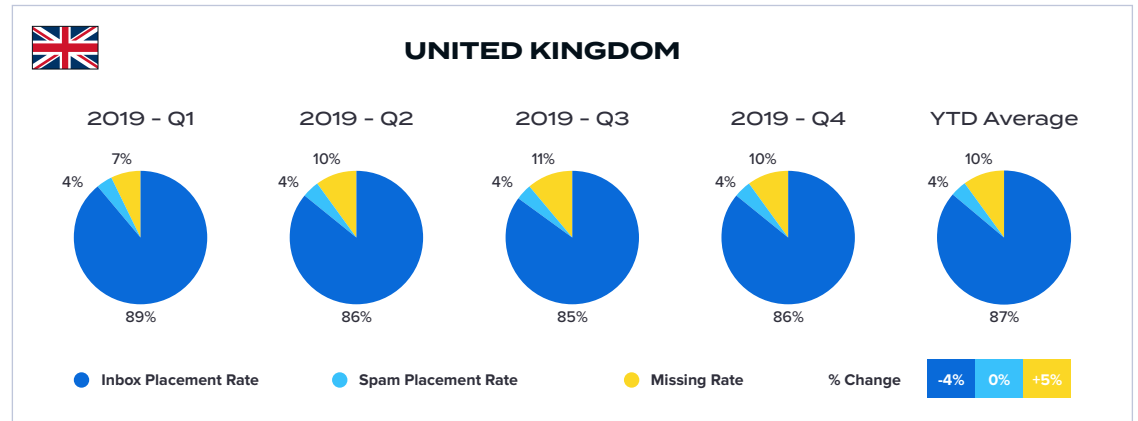
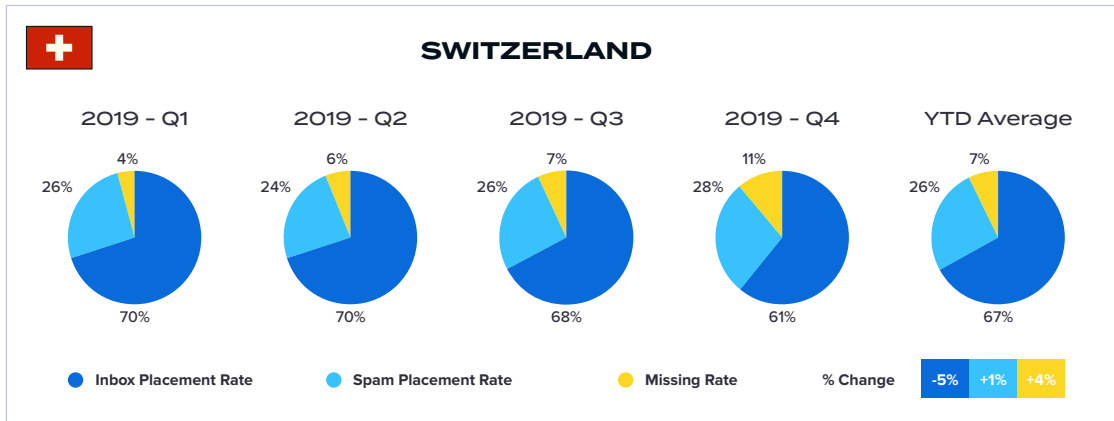
INBOX PLACEMENT IN EUROPE



INBOX PLACEMENT IN EUROPE



INBOX PLACEMENT IN EUROPE





2020 EMAIL DELIVERABILITY BENCHMARK

Inbox Placement In Asia-Pacific

Marketers sending to mailboxes in the Asia-Pacific region had an average inbox placement rate of 84 percent in 2019. Messages in Japan saw the highest inbox placement of all countries studied at 97 percent. Emails to South Korean inboxes were successfully delivered only 74 percent of the time, while in India only 69 percent of emails reached subscribers' inboxes.

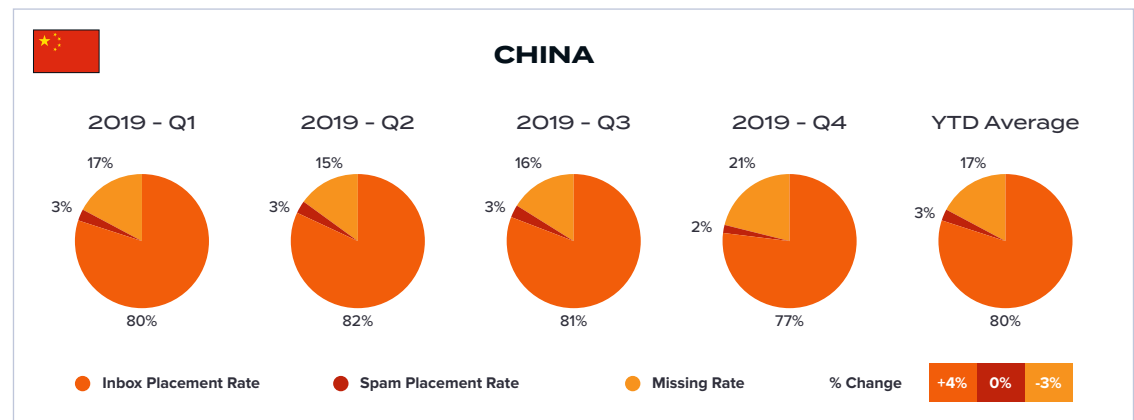
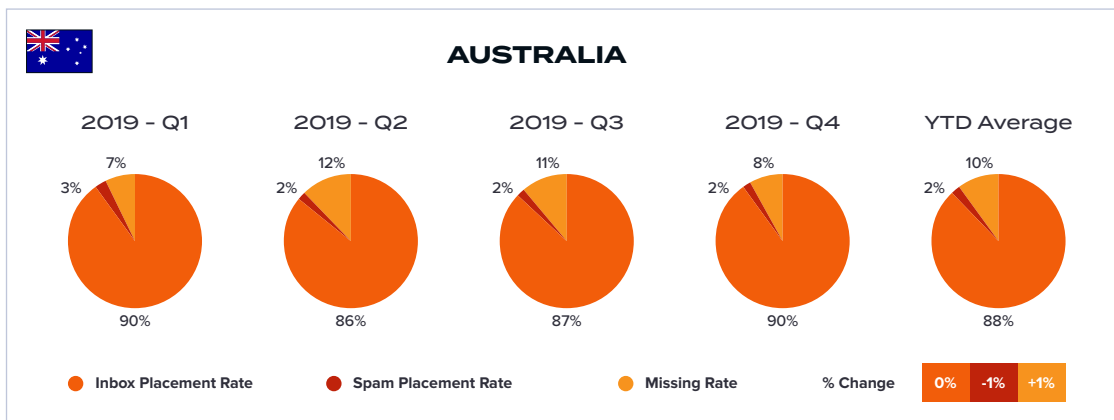
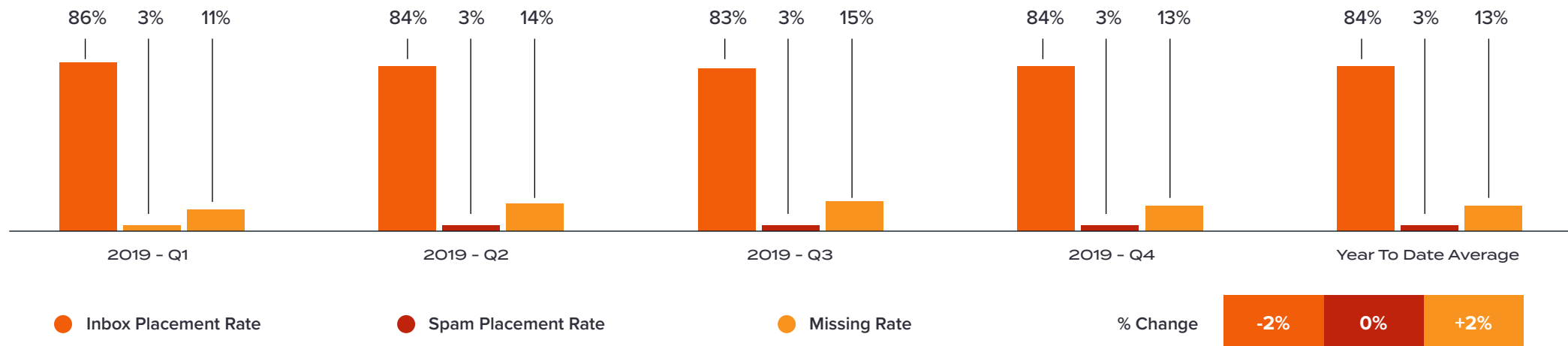
Year-over-year, inbox placement in the region dropped by two percentage points. Most countries saw inbox placement rates remain relatively stable from 2018 to 2019, but Singapore and South Korea experienced double digit dips (10 percentage points and 20 percentage points, respectively.)



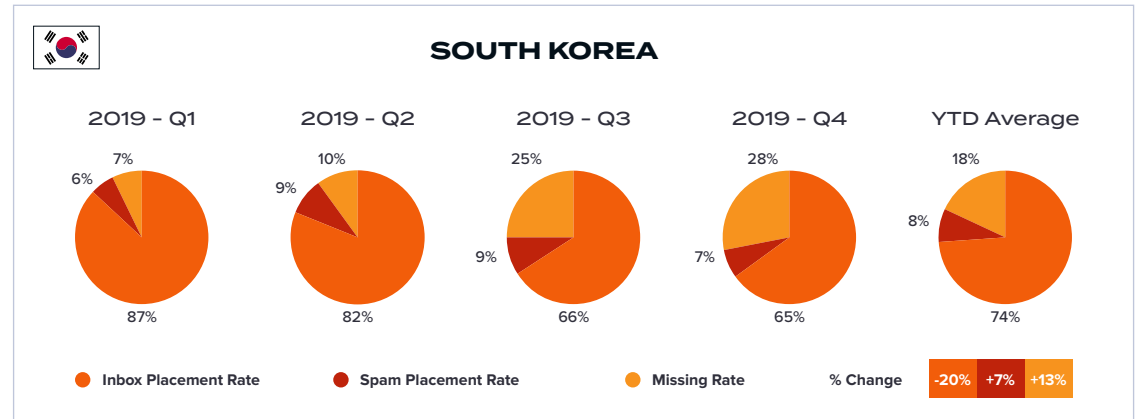
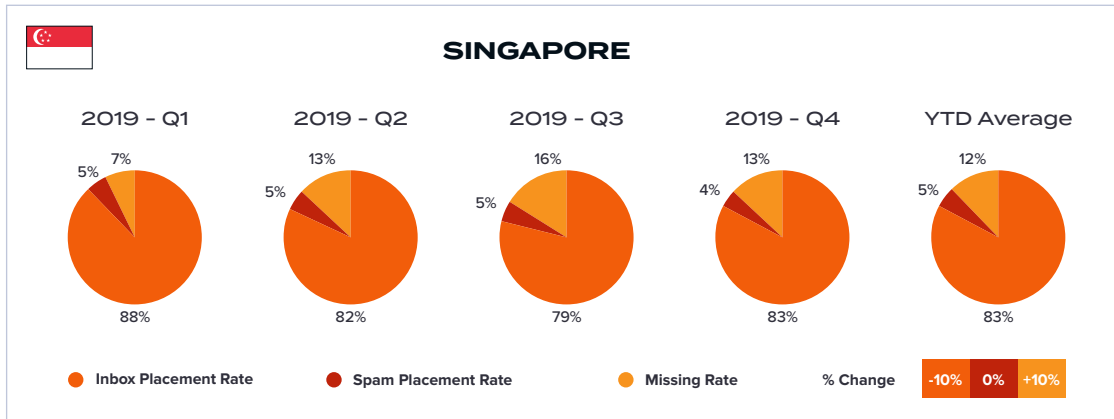
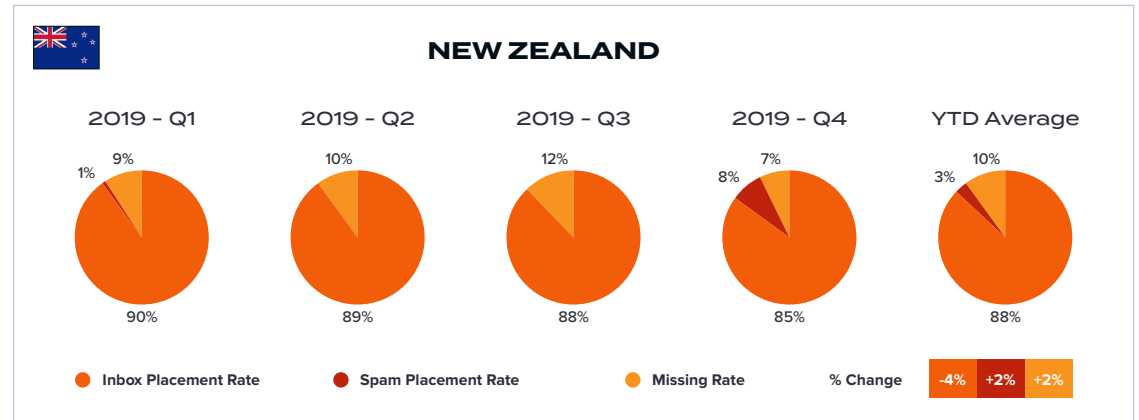
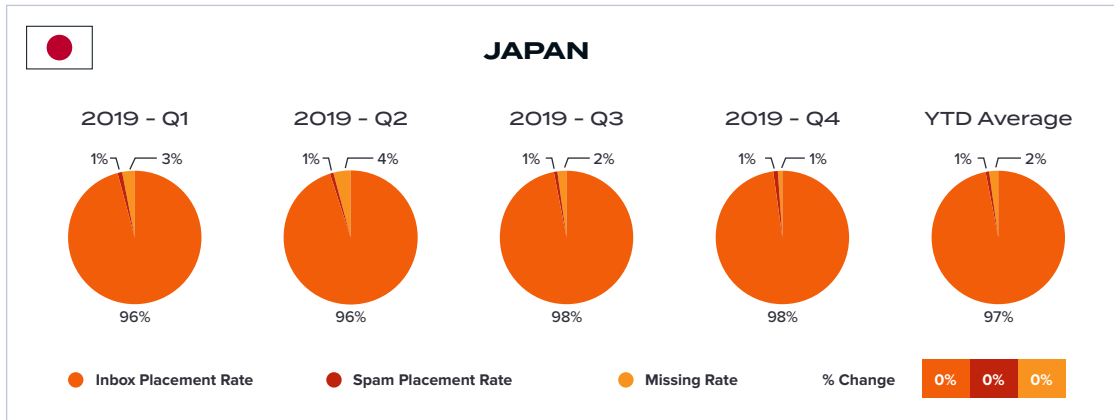
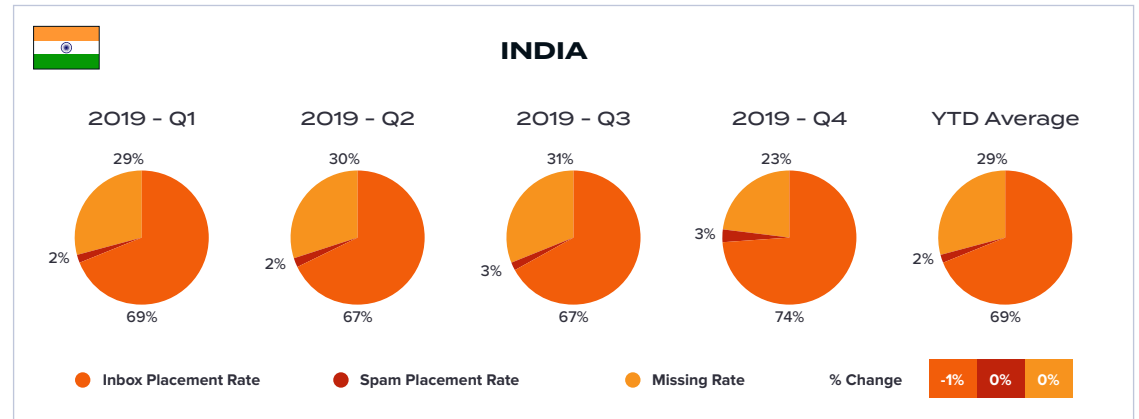
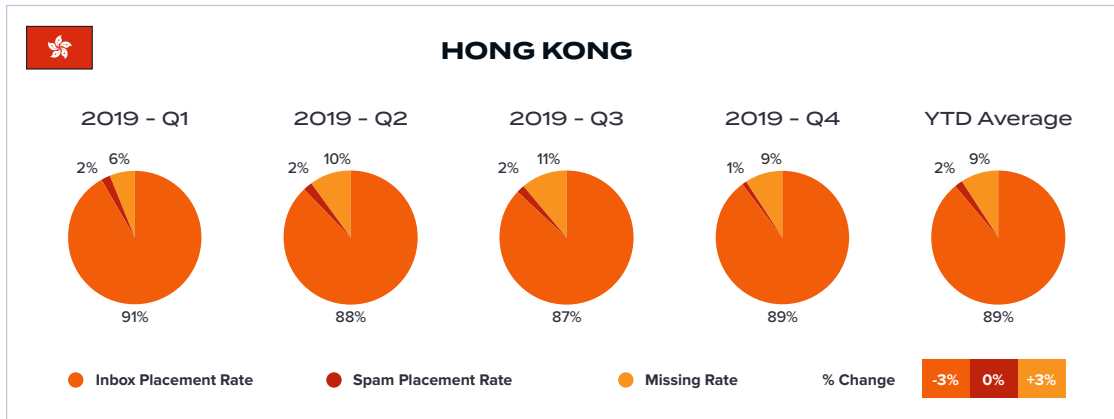
INBOX PLACEMENT IN ASIA-PACIFIC



ASIA-PACIFIC - INBOX PLACEMENT



INBOX PLACEMENT IN ASIA-PACIFIC



GETTING TO THE INBOX

One out of every six messages failed to reach subscribers in 2019—that's a lot of potential revenue marketers are missing out on. While reaching the inbox isn't an easy matter, there are a few simple steps that can increase the chances your messages will pass through filters and reach your subscribers.



Track your inbox placement

You can't fix a problem you don't know about. Having access to and monitoring your inbox placement rate will allow you to more accurately judge the health of your program and can alert you to when your messages are being blocked by mailbox providers.



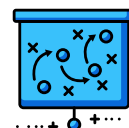
Monitor your reputation

Your reputation is one of the main factors that mailbox providers use to determine whether to place your messages in the inbox or the spam folder. Always check your sender reputation before you send a new campaign to make sure mailbox providers will evaluate your messages favorably, improving your ability to reach the inbox. You can learn more about the value of sender reputation in the **Sender Score Benchmark Report**.



Keep your list clean

Keeping a subscriber list free from spam traps, unknown users, and inactive subscribers will help boost your reputation and your ability to reach the inbox. Run your entire list through a list hygiene service and make sure any new addresses you add are verified as real, active email accounts.



Check to see if you've been blacklisted

Blacklists are lists of known spammers that mailbox providers reference when making deliverability decisions. Consult a blacklist lookup service to ensure your IP address hasn't been blacklisted. If you find that you are listed, consult that specific blacklist's delisting requirements and follow their stated procedures.

METHODOLOGY

Return Path from Validity conducted this study using a representative sample of more than 2 billion promotional email messages sent to consumers around the world between January 1, 2019, and December 31, 2019. Global and regional statistics are based on performance across more than 140 mailbox providers in North America, South America, Europe, and Asia-Pacific. Country statistics are based on a subset of senders whose locations and industry classifications are identifiable.





Businesses run better and grow faster with trustworthy data. Tens of thousands of organizations rely on Validity solutions – including Everest, DemandTools, BriteVerify, Trust Assessments, and GridBuddy Cloud – to target, contact, engage, and retain customers effectively. Marketing, sales, and customer success teams worldwide trust Validity solutions to help them create smarter campaigns, generate leads, drive response, and increase revenue. For more information visit validity.com and connect with us on LinkedIn and Twitter.

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