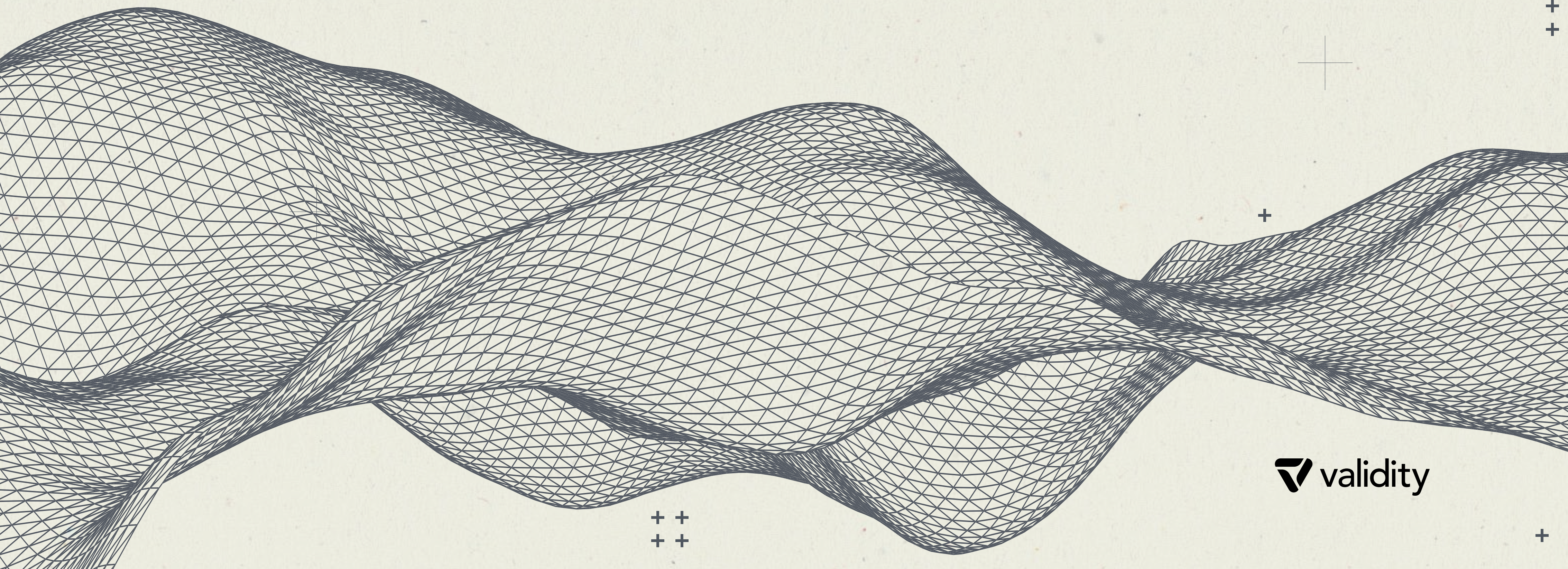


STATE OF EMAIL 2022:

Mastering the New Email Landscape



Introduction

Email marketers are always hungry to reach the next level of email performance. But it’s tough to do when the playing field changes this quickly.

Over the past year alone, COVID-19 threw new curveballs, adoption of Apple’s Mail Protection Privacy (MPP) accelerated, and new consumer privacy laws blocked go-to personalization techniques.

Making matters worse, even tried-and-true performance metrics (like open rates) began to lose their value.

Fear not: Just as humans walked on the moon, explored the ocean floor, and scaled Everest, it is possible for email marketers to navigate—and master—the never-before-seen territory of this new landscape.

Validity created *State of Email 2022: Mastering the New Email Landscape* to be your one-stop guide. This report harnesses the full power of the **Validity global data network**, which pulls data from 2.5 billion mailboxes around the world.

Here’s what to expect:

- ➔ An analysis of global email performance in 2021 (and 2020 when relevant) across nine major performance indicators
- ➔ Expert forecasts for what’s coming to the world of email in 2022
- ➔ Actionable tips for senders to get ahead of the game

Still with us? Good.

Join Validity as we set out to explore the new email landscape—and determine how senders can reach peak email performance in 2022.

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Chapter 1.

External Forces and Industry Shifts

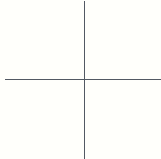




EXTERNAL FORCES AND INDUSTRY SHIFTS

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Global Email Volume



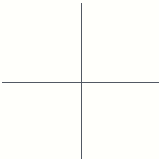
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It’s easy to become laser-focused on one’s own email program. But smart marketers know the impact the larger email ecosystem has on their success.

Unsurprisingly, the onset of the COVID-19 pandemic in early 2020 had a massive impact on global email volume.

As consumers pivoted to online shopping and many sought resources to help them adapt to pandemic life, companies around the world realized the true value of the email channel.

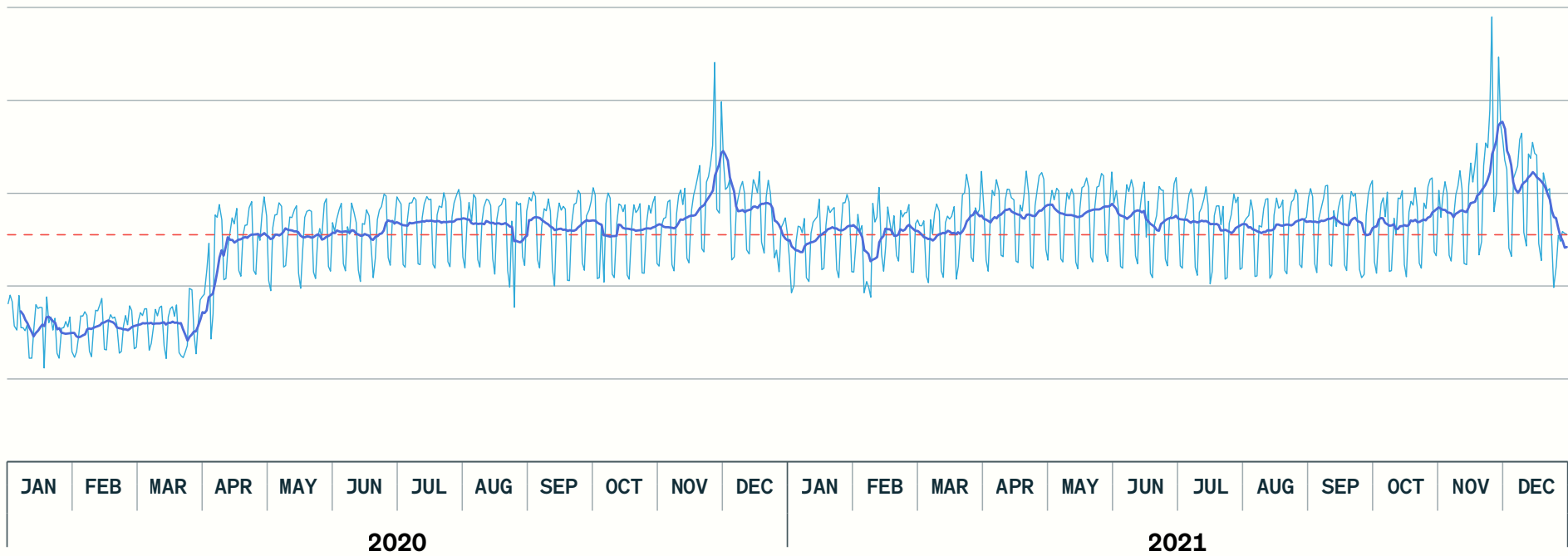
The result? **Global email volume rose by 14 percent from 2020 to 2021.** This initial disruption created a “new normal” for email activity, which has persisted since.



EXTERNAL FORCES AND INDUSTRY SHIFTS: GLOBAL EMAIL VOLUME

What Happened in 2020-2021

[Figure 1]



Validity reviews global email volume on a relative basis, evaluating all movements by their positive/negative variance from the long-term average (the dotted red line in figure 1).

Email activity increased by approximately 60 percent from March-April in 2020. Global email volume remained at this elevated volume throughout 2021.

Although a slight dip occurred in January, this was not as pronounced as the post-holiday slumps seen in prior years.

Events like Valentine’s Day, Easter, Mother’s Day, and even Amazon Prime Day all contributed to robust email performance during the first half of 2021.

Global volume then subsided slightly as summer arrived in the Northern Hemisphere. Warm weather, along with a (temporary) relaxation of COVID-19 restrictions, meant email subscribers could spend more time outside and less time at their computers.

Towards the end of the year, email volume picked up steam as businesses pushed to achieve strong end-of-year performance and offset sales lost during the pandemic. Consumers bolstered this trend by starting their holiday shopping earlier than usual, due to widely publicized supply chain issues.

As expected, global email volume skyrocketed over Black Friday/Cyber Monday weekend.

Global email volume over Black Friday/Cyber Monday weekend:

- ➔ 70 percent above the 2021 average
- ➔ 5 percent higher than the Black Friday/Cyber Monday weekend in 2020

This strong performance continued throughout the traditional holiday season and other peak sales season events like Click Frenzy, Singles’ Day, and Diwali.

The light blue line on figure 1 shows **daily** movements in global email volume. The upper limit of the range generally represents Monday to Friday activity, and the lower end represents weekends. In 2021, email volume decreased by 25 percent on weekends.

IS PEAK SALES SEASON CAUSING YOU HEADACHES?

Maintaining momentum during peak sales season while managing subscriber fatigue, complaint rates, and dwindling engagement is no small task.

Validity has your back. Read **Peak Sale, Peak Performance**—the ultimate sender’s survival guide to peak sales season.

READ THE EBOOK



Forecast for 2022

In short, this new normal is here to stay. Global email volume will continue to increase in 2022.

The good news is that the email channel is proving to be more relevant than ever. However, high sending volume means added pressure on deliverability and increased competition in subscribers’ inboxes.

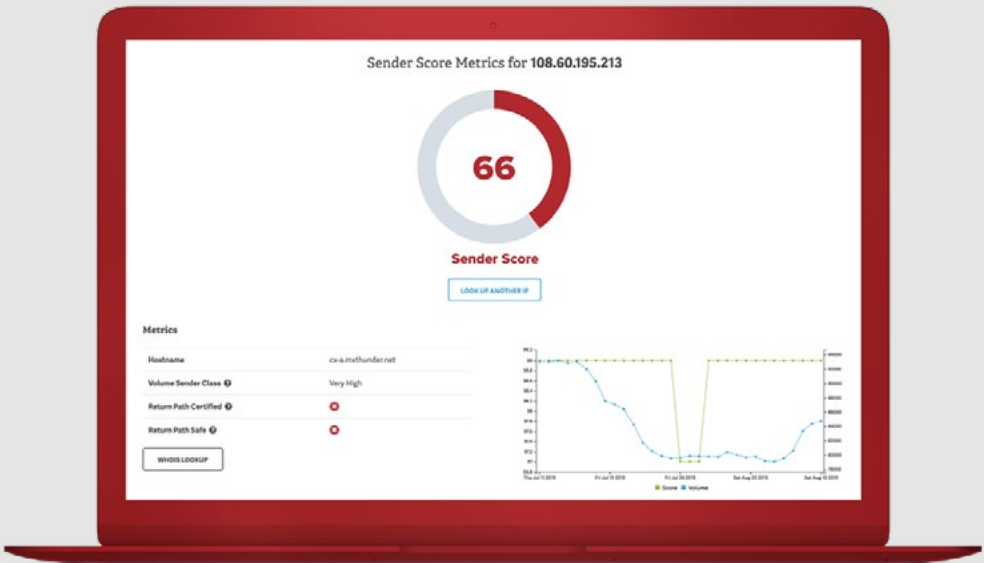
How to Adapt

- ➔ **Maintain a top sender reputation.** Increased email volume means a solid sender reputation is vital for deliverability. Mailbox providers (MBPs) use sender reputation to inform their delivery and throughput decisions—and decide who gets blocked, junked, or throttled. Senders should consistently monitor their sender reputation to identify problem areas quickly.
- ➔ **Offset scheduled sending times.** A major MBP partner revealed to Validity that **70 percent of all email traffic occurs within the first 10 minutes of every hour** (since bulk sends usually start at the top of the hour). Shifting sends by 10 or 15 minutes means your messages will encounter less competition for bandwidth and processing capacity, and less-congested inboxes.
- ➔ **Use the weekend window.** Given that email volume is 25 percent higher during weekdays, weekends are a prime opportunity to communicate with customers in less-busy inboxes.

WHAT’S YOUR SENDER SCORE?

A low Sender Score leads to big deliverability problems. But many email senders don’t monitor their score at *all*—and they’re stuck operating in the dark.

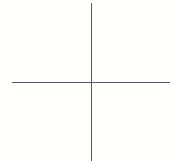
Check your Sender Score in minutes and learn how to improve it.



GET YOUR SCORE

+

“The email channel is proving to be more relevant than ever.”



EXTERNAL FORCES AND INDUSTRY SHIFTS

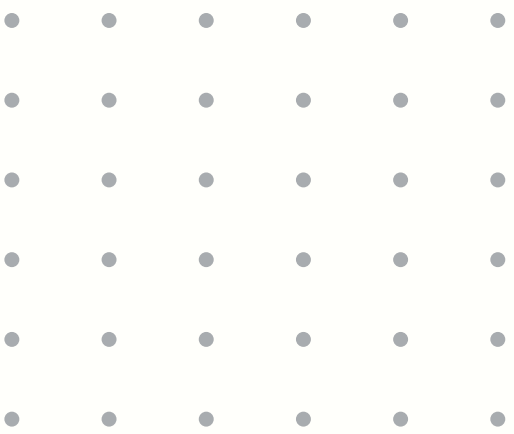


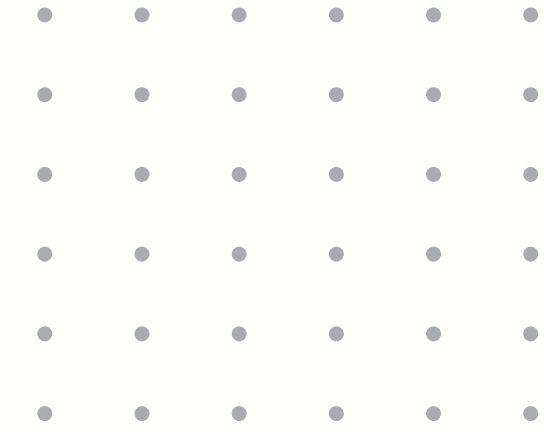
Email Reading Platforms



Recipient device usage is often measured using an engagement tracking pixel, which functions like an open tracking pixel. This is how Validity gathers information about device usage, subscriber location, and email dwell time. Where image caching makes it impossible to accurately identify the devices used, Validity reports on the “proxies” (Apple, Gmail, Yahoo).

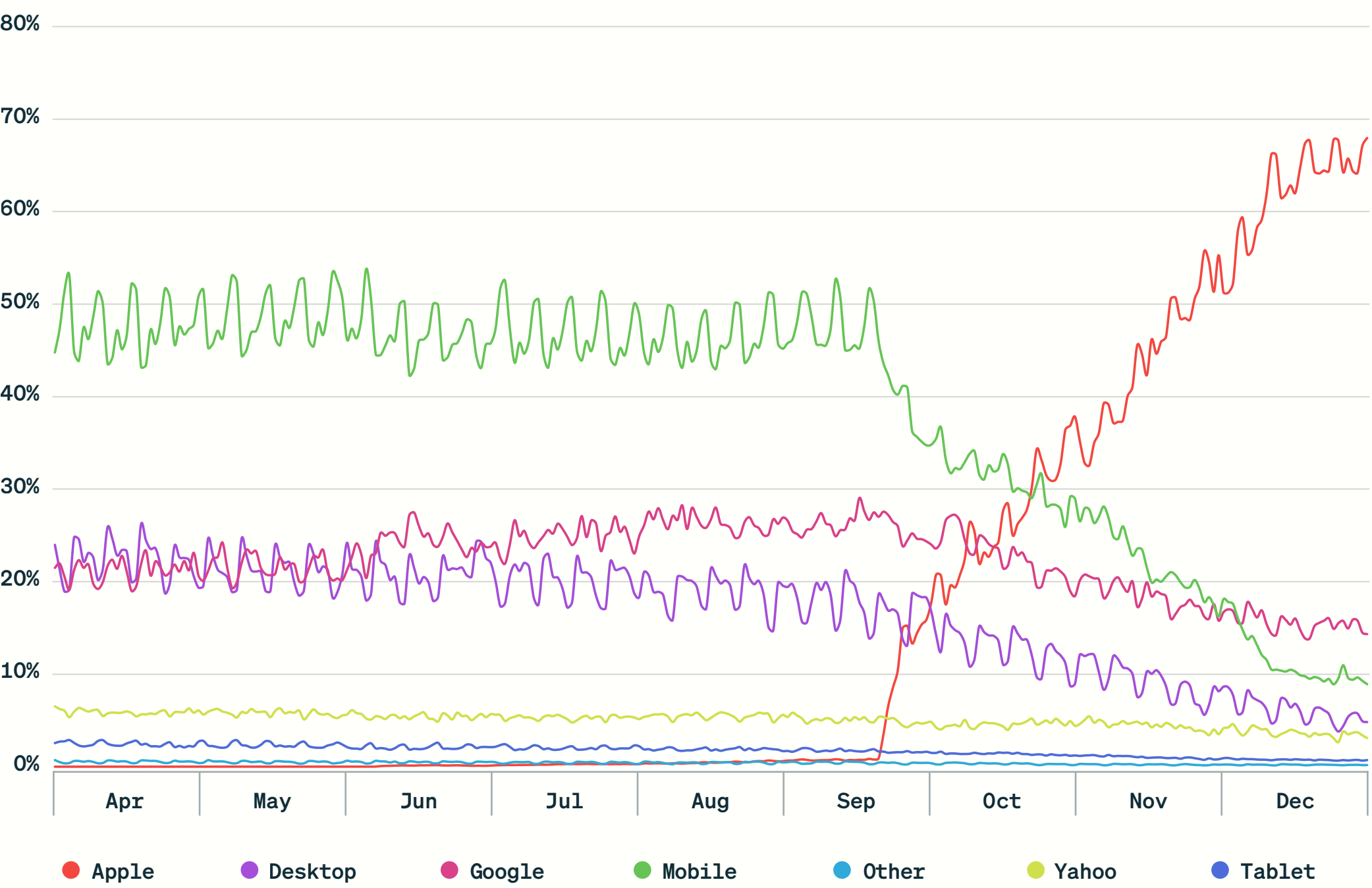
For the remaining users, we report on the device category (mobile, tablet, desktop). It’s important to note that Apple downloads images at the point of delivery—unlike Gmail and Yahoo, which download images when emails are opened.





What Happened in 2021

[Figure 2]



For the first eight months of 2021, trends in subscriber device usage were fairly predictable.

Almost half of all subscriber interactions occurred on mobile devices (see figure 2). Gmail (Google) users represented another quarter of total interactions (and were trending upwards). Desktop users represented another fifth (and were trending downwards).

Apple’s MPP changed everything.

From the rollout of MPP on September 20th through December 31st, pixel fires from the Apple proxy rocketed to ~70 percent of the total. Over the same period, pixel fires from mobile devices, desktops, tablets, and non-Apple proxies (Google and Yahoo) shrunk to a combined ~30 percent of the total.

Figure 2 highlights the clear measurement challenges MPP creates for email marketers, as many Microsoft, AOL, Gmail, and Yahoo address owners read email using the Apple Mail client.



Forecast for 2022

How high can this Apple proxy chart theoretically climb as we near full MPP adoption in 2022?

Most estimates suggest Apple represents about 40 percent of mobile users. So, we can assume that before MPP, about 40 percent of all email opens were already generated by Apple users. This figure is heavily informed by marketing audiences in North America and Europe. In developing nations like India and Brazil, Android devices are far more prevalent, and Gmail usage is well over 80 percent since it is pre-installed on Androids.

Let's assume Apple Mail users generate 80-100 percent open rates. Remember, not all Apple users opt in to MPP—we can see the Apple proxy rate is headed to a peak of around 75 percent. Also, while tracking pixel images are automatically downloaded at the time of email delivery, this does not happen if devices are offline, disconnected from a power source, or if emails are placed in the junk folder.

So, if 40 percent of mobile users are at that higher open rate and the other 60 percent of non-Apple users continue to generate 25 percent true open rates, we can assume the number we're seeing here is already close to saturation point.

How to Adapt

- ➔ **Source zero-party data.** Because first-party data (inferred from online behavioral metrics like open rates) is becoming less accurate, focus on sourcing zero-party data (information customers explicitly share with your brand) to create relevant messaging.
- ➔ **Update recency algorithms.** Emails to Apple Mail users will almost always generate a pixel fire, meaning these addresses give the impression of being permanently active. In reality, they may be inactive or even dormant. Rely on other signals of engagement, like last clicked, as well as signals from outside the email program, including last website visit or last purchase, to know when to suppress non-responders.

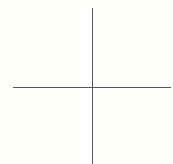
TAKE YOUR MARKETING PROGRAM FROM ZERO TO 100

Zero-party data finally makes it possible for email personalization and consumer privacy to coexist.

To learn how to implement a winning strategy for zero-party data and see examples from leading brands, check out our eBook, **Zero-ing in on Zero-Party Data**.

READ THE EBOOK





EXTERNAL FORCES AND INDUSTRY SHIFTS

Inbox Placement Rate vs. Spam Placement Rate



When most email service providers (ESPs) talk about **deliverability**, they’re referring to **delivery rate**—the percentage of sent emails that don’t generate soft or hard bounces.

At Validity, we measure *true* deliverability by **inbox placement rate (IPR)**—the percentage of sent emails that successfully reach recipients’ inboxes, where they can be seen and clicked.

MBPs may accept lower quality emails but place them in recipients’ spam folders if they fail one or more filtering checks. Poor-quality emails may be rejected at the MBPs’ gateways. These emails are referred to as “missing.”

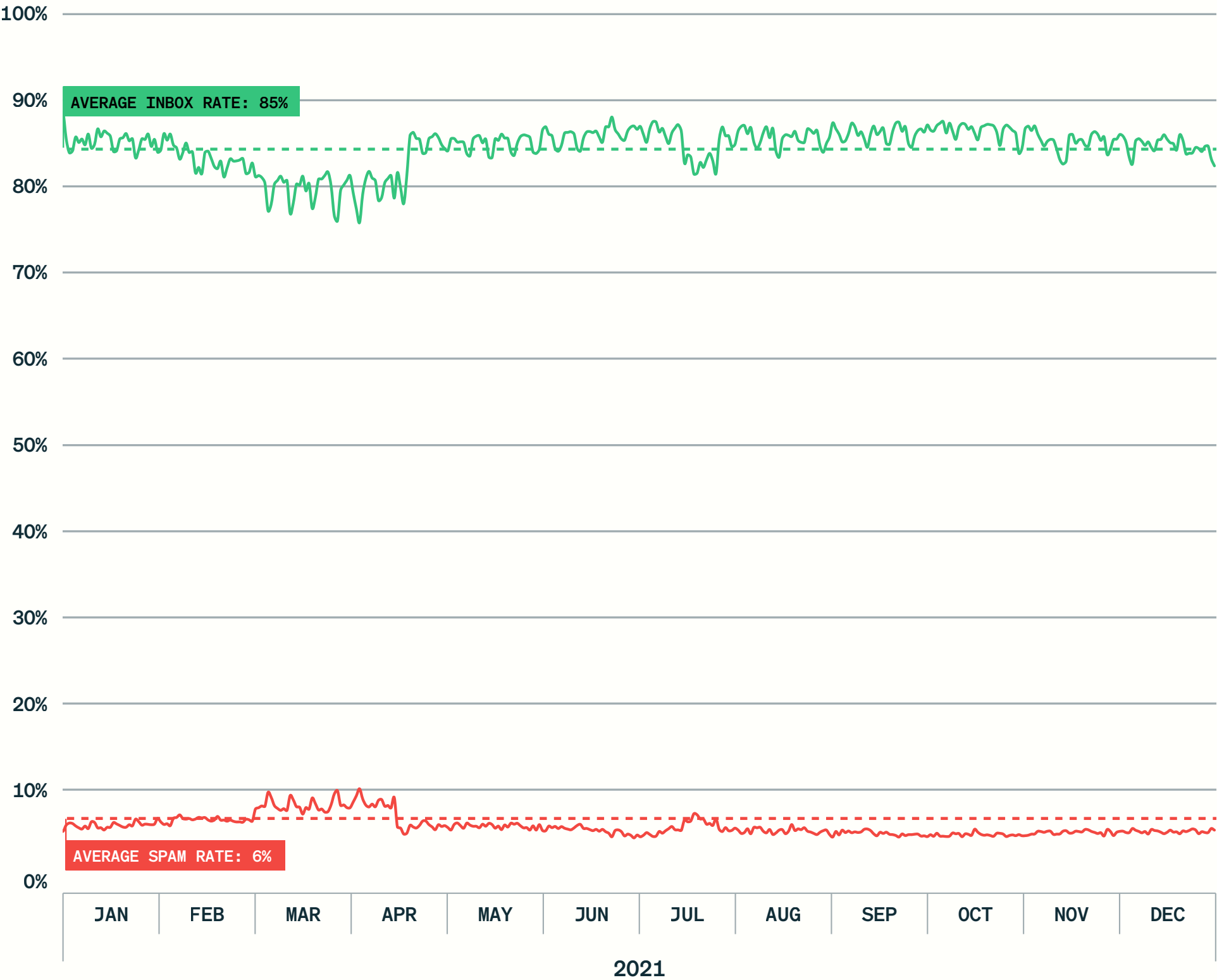
Senders should monitor all of these metrics to accurately measure deliverability.



EXTERNAL FORCES AND INDUSTRY SHIFTS: INBOX PLACEMENT RATE VS. SPAM PLACEMENT RATE

What Happened in 2021

[Figure 3]



In 2021...

- ➔ Average inbox placement rate was 85 percent.
- ➔ Average spam placement rate was 6 percent.
- ➔ Average missing rate was 9 percent.

Despite the pressure created by increased sending volume, global IPRs remained consistent in 2021.

The slight dip in early 2021 can be partially attributed to a change in Gmail’s filtering algorithms: Complaint rates are now calculated against inbox volume, not total volume. This decrease in placement rate also reflects how COVID-19 negatively impacted subscriber sentiment. Many senders dug deep into their subscriber lists during COVID-19, using pandemic-related communications to re-engage inactive contacts. Subscribers quickly grew weary of this tactic.

As spring arrived in the Northern Hemisphere and public mood lifted, IPRs trended upward and spam placement fell.

After peaking around 87 percent in October, global IPRs declined to slightly below the year-to-date benchmark. This dip reflects deliverability pressures caused by the high-volume peak sales period, and is consistent with prior years’ trends.

The introduction of MPP in September 2021 also played a role. Senders found it more difficult to measure subscriber recency as the quality of open rate data from Apple Mail users decayed.

EXTERNAL FORCES AND INDUSTRY SHIFTS: INBOX PLACEMENT RATE VS. SPAM PLACEMENT RATE



Figure 4 shows how inbox placement rates vary by industry sector. Unsurprisingly, the healthcare/insurance sector achieved the strongest IPRs in 2021—COVID-19 concerns made recipients more apt to engage with this type of messaging. The media/entertainment sector fared far worse due to widespread cancellations of concerts and sporting events.

Forecast for 2022

Around 40 percent of all global emails are read in the Apple Mail client (including many sent to Outlook/Yahoo/Gmail addresses). Less accurate email recency will mean degraded list hygiene practices. As a result, **global deliverability will trend downwards in 2022.**

How to Adapt

- ➔ **Measure sender reputation.** All major MBPs measure sender reputation and use this information like a credit score to determine when to accept emails and where to place them (inbox, spam, junk, etc.). Measure your reputation daily using [Sender Score](#) and proactively address any issues before they sabotage program performance.
- ➔ **Monitor inbox placement.** Inbox placement is different from delivery rate and requires specialized monitoring to provide accurate reporting. Oftentimes, the best way to achieve this visibility is with the right software. [Everest](#), the email success platform from Validity, offers insights from over 100 MBPs tailored to the composition of each sender’s list, so senders can prioritize areas that will have the greatest impacts on their programs.
- ➔ **Use Microsoft SNDS and Google Postmaster Tools.** Some major MBPs provide useful functionality to help senders understand precisely how their email activity is perceived and what levers (volume, complaints, bounces, trap hits, authentication, etc.) can be pulled to improve this view.

MAXIMIZE YOUR INBOX PLACEMENT WITH EVEREST, FROM VALIDITY

Users of Everest, the email success platform from Validity, benefit from its **Reputation module** to gain a single view of key reputation touchpoints such as Microsoft SNDS and Google Postmaster Tools. Everest offers insights from over 100 MBPs tailored to the composition of your list, so you can maintain a strong reputation and get more messages to more people.

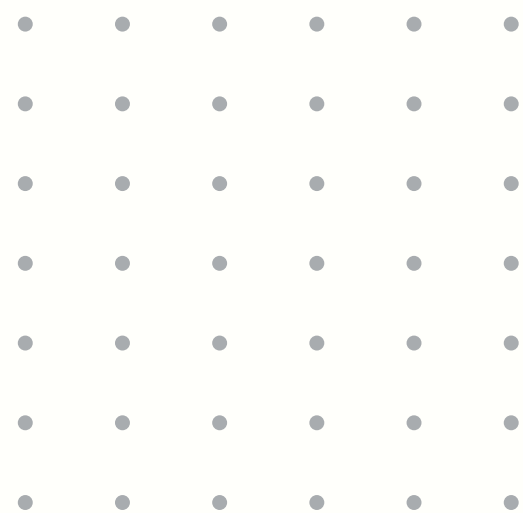


GET A DEMO

Chapter 2.

Reputation





REPUTATION

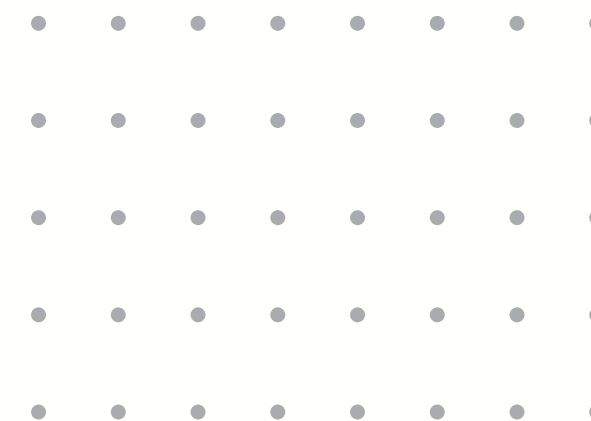
+ Bounce Rate

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Monitoring bounce rates is an important part of a good email hygiene strategy. High levels of unknown users have a negative impact on sender reputation and make it harder to achieve strong deliverability. Bounce rates are also an important driver of list churn. These percentages may seem small, but as they compound year-over-year, the impact becomes significant.

The lifetime value of a customer's email address is approximately \$50, highlighting the opportunity cost of poor bounce management.

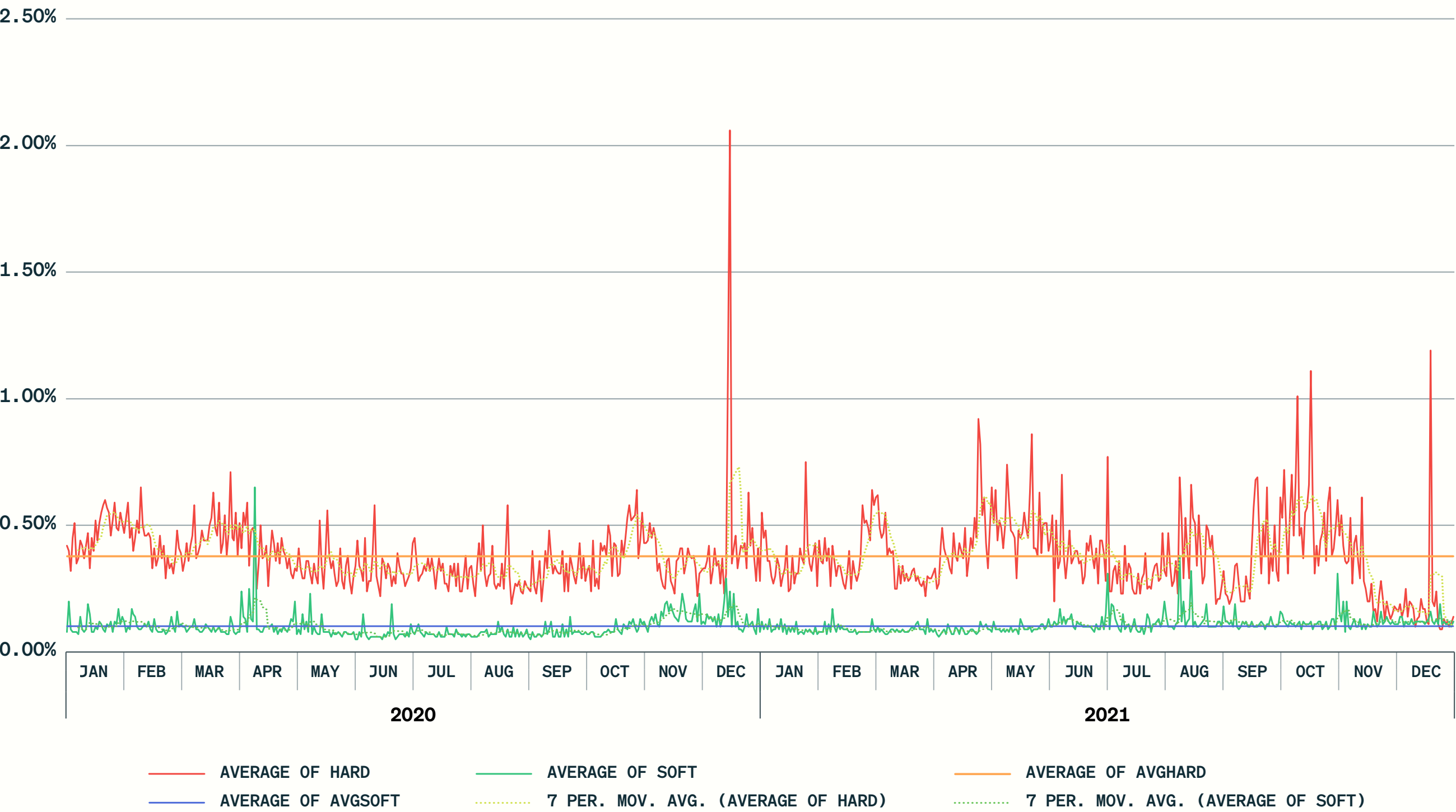
We measure hard bounces, which typically indicate permanent conditions (e.g., the email address doesn't exist), and soft bounces, which typically indicate temporary conditions (e.g., the recipient is out of office).





What Happened in 2020-2021

[Figure 5]



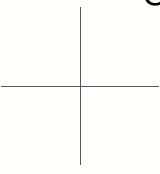
In 2021...

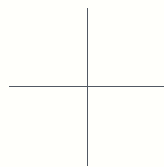
- ➔ The average hard bounce rate was 0.4 percent.
- ➔ The average soft bounce rate was 0.1 percent.

Although average hard bounce rates for 2020 and 2021 were nearly identical, they were visibly more *volatile* in 2021.

Why? COVID-19 pushed less tech-savvy businesses online, and their traditionally offline customers were forced to follow. As the pandemic’s impact slowly diminishes, it’s possible many of these digital immigrants are starting to disengage.

Soft bounce rates in 2021 were far more consistent. However, it’s notable that soft bounce rates increased during vacation periods, when out-of-office activity is greater.





Forecast for 2022

Some bounces result from factors like poor reputation. Unfortunately, Apple’s MPP will make it harder for senders to measure subscriber recency. Apple Mail accounts that appear active will generate more bounces as they actually become inactive or dormant. Senders should prepare for Apple’s “hide my email” functionality to generate additional bounce activity as subscribers deactivate their temporary addresses rather than unsubscribe.

How to Adapt

- ➔ **Review bounce logs.** When emails can’t be delivered, they typically generate a bounce code in the format “4.x.x” for temporary failures or “5.x.x” for permanent failures. Senders base their bounce suppression strategies on these codes. However, since MBPs can be inconsistent—i.e., rejecting emails with a permanent code, but where the bounce message indicates a temporary cause—review your bounce logs on a regular basis to identify these mismatches. Then, you can implement rules to correctly process these rejections.
- ➔ **Harness MPP.** Although MPP has created new challenges for email senders, it also provides some advantages. For example, the automatic download of tracking pixels will only happen for valid addresses. Senders can use reporting functionality like the [Everest Engagement module](#) to identify these data points and assimilate them as part of a complete data hygiene strategy.

“Monitoring bounce rates is an important part of a good email hygiene strategy.”

TURN MPP INTO A WIN FOR YOUR EMAIL PROGRAM

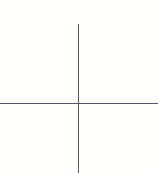
Mail Privacy Protection (MPP) is Apple’s latest consumer privacy feature. MPP means huge changes for email senders. With limited insight into who is opening emails and how to tailor the consumer experience after the fact, it’s time to throw out old playbooks and implement new strategies.

To get up to speed quickly, read our eBook, **What the Heck is Mail Privacy Protection?**



READ THE EBOOK





REPUTATION

Microsoft SRD Rate

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Sender Reputation Data (SRD) comes from Microsoft’s Spam Fighters program. In this program, participants are periodically asked if the marketing emails they have received recently are legitimate or junk.

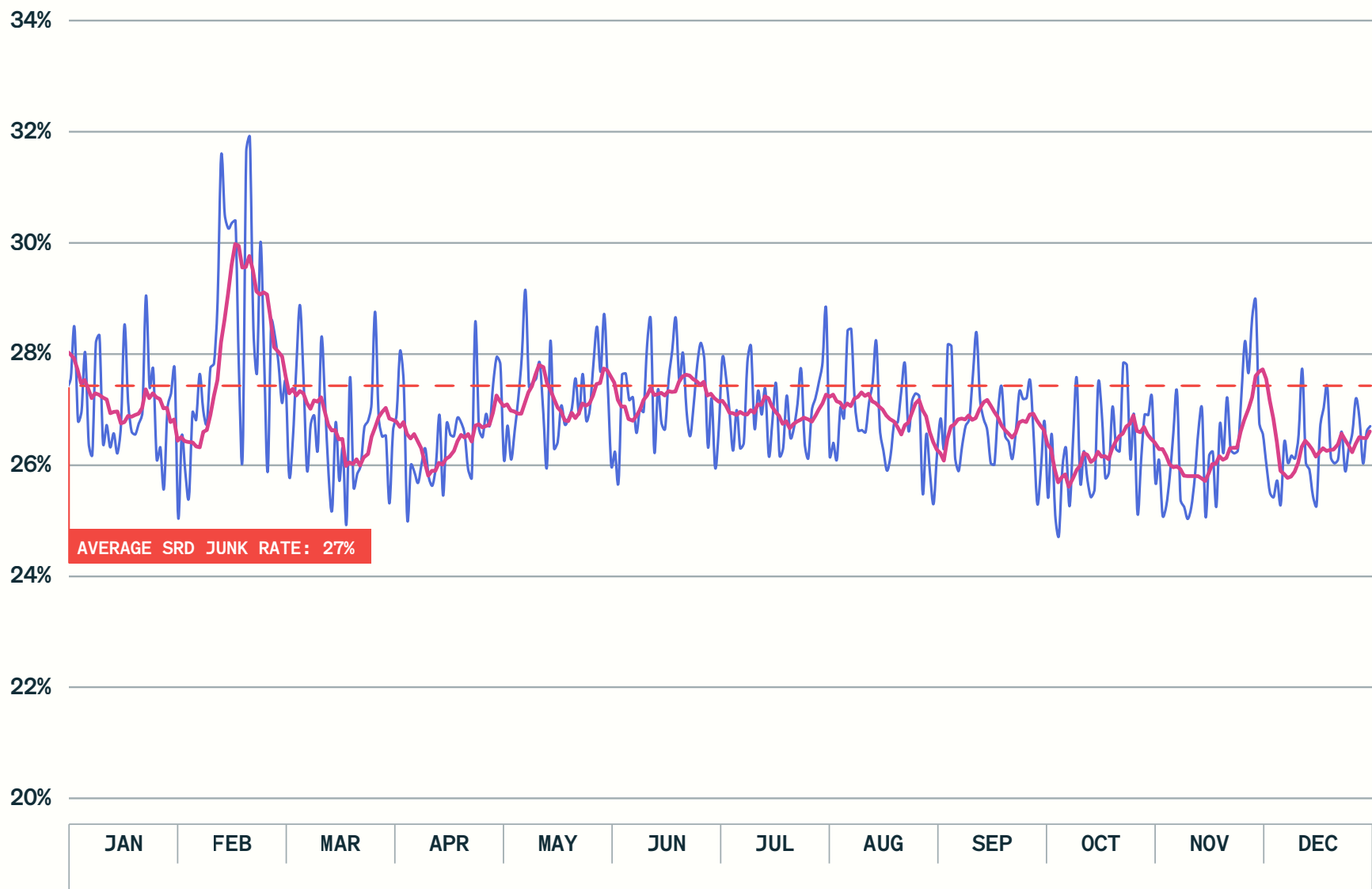
The percentage of negative responses forms the SRD rate. This number is used to calibrate Microsoft’s spam filters and serves as a compliance metric for the Validity Sender Certification program. Smart senders use this feedback to improve their subscriber experience.

+



What Happened in 2021

[Figure 6]



In 2021, the average SRD rate was 27 percent.

The SRD rate trended downward throughout 2021. This shows marketers are taking important steps to create relevant, personalized emails that encourage engagement.

The biggest spike in the SRD rate occurred on Valentine’s Day. What caused the rise in complaints? We can hazard a few guesses. Due to COVID-19 restrictions, many consumers were unable to spend the day with loved ones. Others lost loved ones during the pandemic. Emails that failed to display appropriate awareness and empathy saw much higher levels of negative voting.

This data also demonstrates a correlation between global email volume and global SRD rates. As volume increases, so does SRD. Why? Because the relevance of the channel as a whole decreases when subscribers are flooded with additional volume. The spike in the SRD rate towards the end of November (during the influx of Black Friday/Cyber Monday promotions) clearly illustrates this correlation.

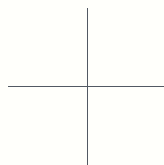
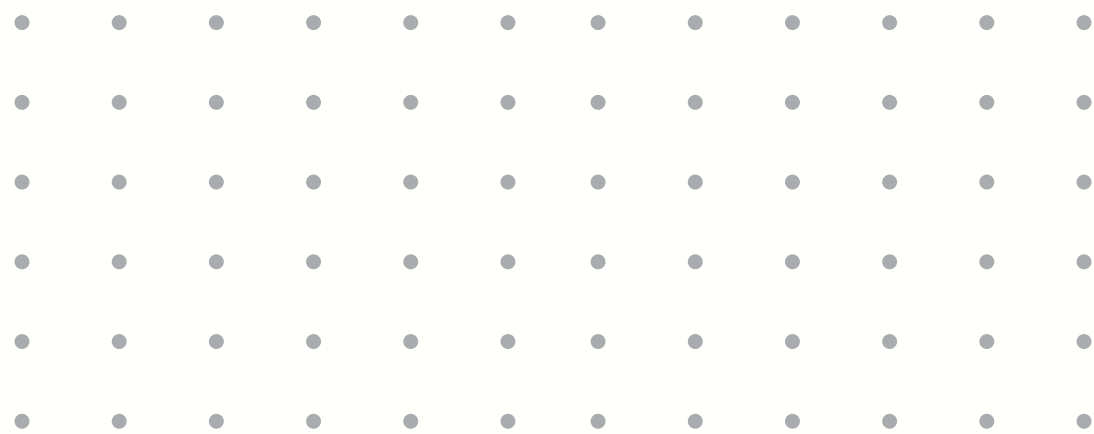
Forecast for 2022

The pandemic inspired many senders to improve their programs by sending more relevant, empathetic messages. As many continue this approach, the long-term SRD rate will continue to trend downward.

Nonetheless, email marketers should still be mindful of best practices during high-volume sending periods.

How to Adapt

- ➔ **Embrace criticism.** Senders should view SRD through a more positive lens. SRD is like having a Net Promoter Score survey run on your behalf. If the responses indicate high levels of detractors, use this powerful signal to identify and fix the problem.
- ➔ **Seek customer feedback.** To ensure high email relevancy, implement ongoing feedback mechanisms. Functionality like “rate this email” provides a quick way to gain visibility into what subscribers want.
- ➔ **Remember frequency matters.** Validity research shows negative SRD rates increase as Microsoft volume increases (and relevance decreases). Less-engaged Microsoft subscribers are also more likely to register negative votes. Following email best practices around frequency and recency will result in lower SRD rates and improved program performance.



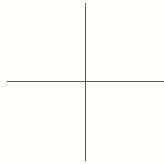
REPUTATION

Spam Complaint Rate



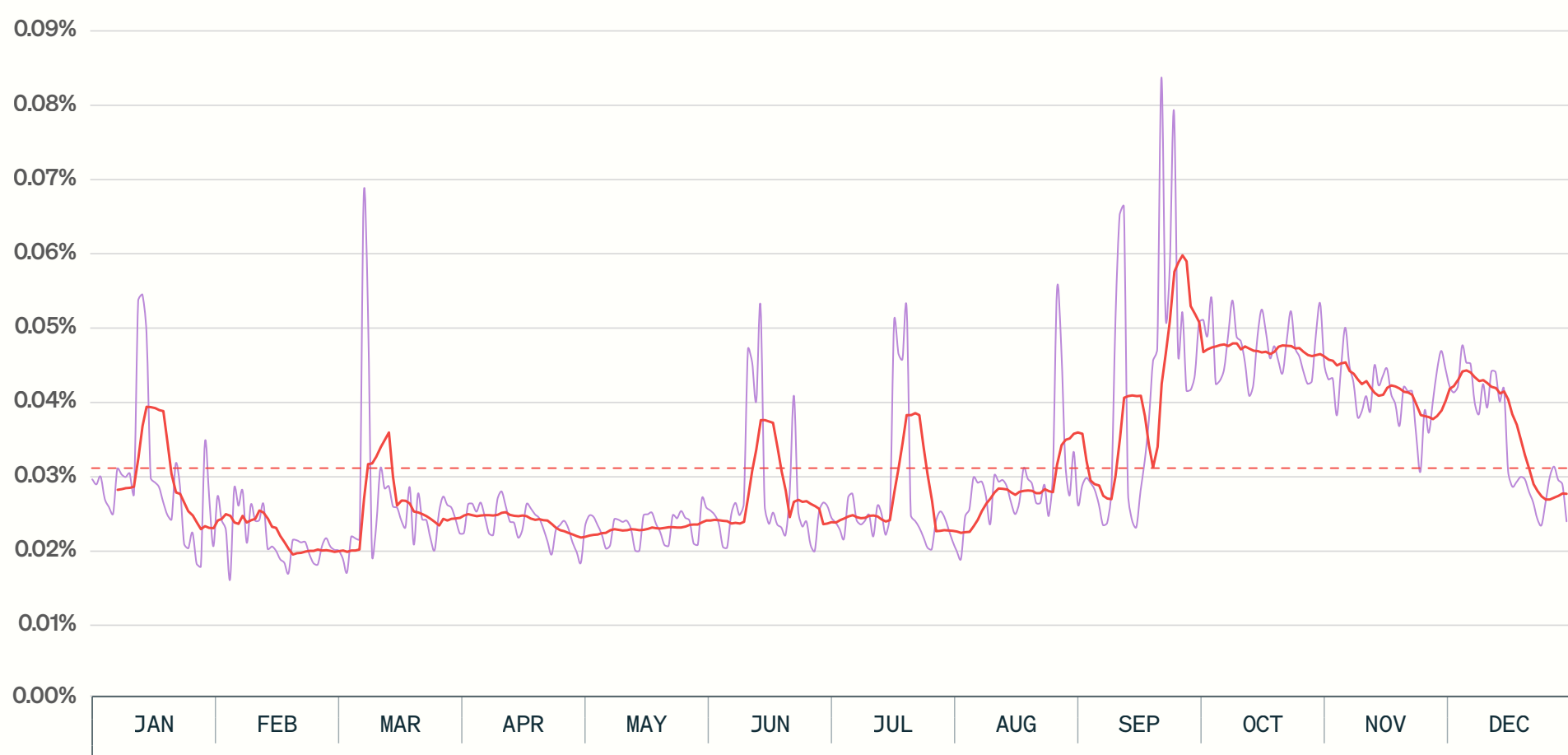
Spam complaint rates are determined by subscribers who click “this is spam” or “mark as junk” buttons in emails they no longer wish to receive.

Subscribers often use this approach interchangeably with unsubscribing to stop receiving emails. But there’s a key difference: High spam complaint rates have negative implications on sender reputation and deliverability—unsubscribes don’t.



What Happened in 2021

[Figure 7]



In 2021, the average spam complaint rate was 0.03 percent.

Spam complaints spiked in mid-January, coinciding with [Blue Monday](#) (supposedly the most miserable day of the year). Complaints then dropped rapidly before creeping back upward during high-volume sending periods like Mother’s Day.

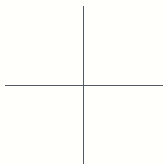
Interestingly, spam complaints increased significantly during the last week of September, doubling from the 0.03 percent benchmark to 0.06 percent. This data in hand, we must question if the spike is related to the introduction of MPP. While the connection isn’t immediately obvious, the corresponding drop in unsubscribe rates (more on this later) suggests a relationship.

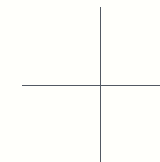
Forecast for 2022

Spam complaints are closely related to email volume and frequency. As global email volume rises, spam complaint rates will continue to trend upward in 2022. However, many senders are now committed to delivering more relevant messages, which will offset the full impact.

How to Adapt

- ➔ **Use all available feedback loops.** Senders should sign up with all available feedback loops (FBLs) so they can suppress complainers from future mailings.
- ➔ **Remove friction from unsubscribing.** Email recipients are three times more likely to unsubscribe from an email program than they are to make a spam complaint. This is good news. However, subscribers generally take the path of least resistance—which in many cases is to mark emails as spam. To prevent unnecessary complaints, senders should simplify the unsubscribe process. Provide a genuine, one-click opt-out process, and ensure all emails contain a list-unsubscribe record in their headers.
- ➔ **Make unsubscribe links more visible.** Instead of hiding unsubscribe links in email footers, make them prominent. Some senders even place these links in pre-header text. Unsubscribe rates may increase, but complaint rates will decrease. This transparent approach will also engender consumer trust.



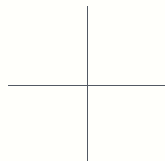


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REPUTATION

Spam Traps

+

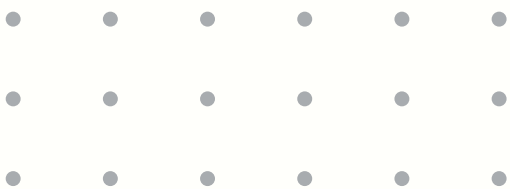


Mailbox providers, filtering companies, and blocklist operators use spam traps to identify senders who don't follow email best practices.

There are three common spam trap categories:

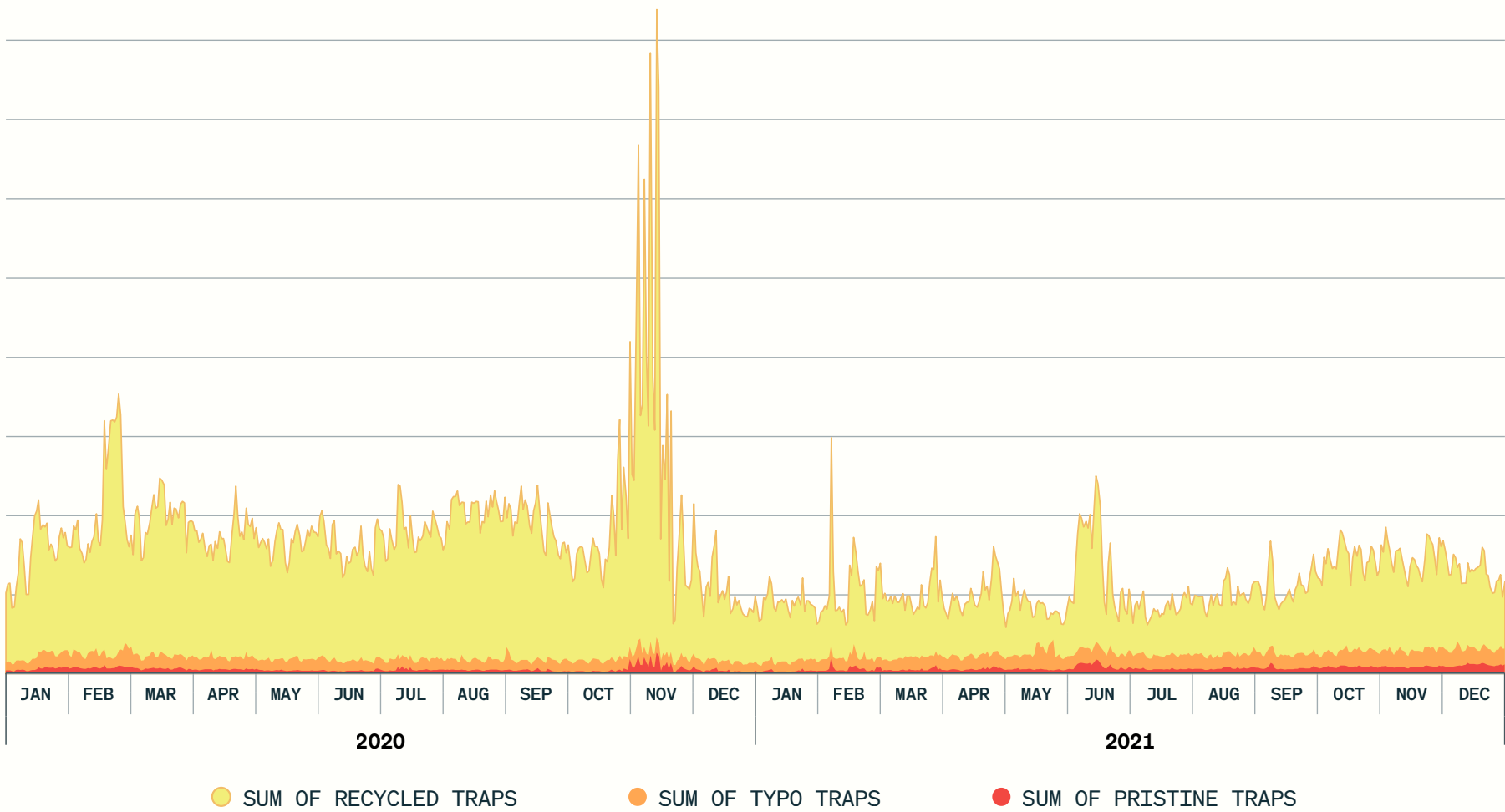
- ➔ **Recycled:** Email addresses that were once valid, but were reassigned to identify spam after they fell dormant
- ➔ **Typo:** Emails with common typos (e.g., "gmial" instead of "gmail") that were repurposed as spam traps
- ➔ **Pristine:** Created by MBPs and antispam vendors with the intention of identifying non-permissioned senders

Validity's 2021 data (see figure 8) shows recycled addresses represent ~72 percent of total trap hits. Typo traps represent an additional ~20 percent, and pristine traps (the most damaging in terms of reputation and deliverability) represent the remaining eight percent.



What Happened in 2020-2021

[Figure 8]



Overall, trap hits in 2021 decreased from 2020 levels. Recycled trap hits in particular dipped by ~40 percent.

One possible reason for this decline is that when COVID-19 hit in March 2020, many businesses used every email address they had in a desperate attempt to communicate with their customers. Since then, improved awareness of best practices has led to improvements against this metric.

Trap hits increased throughout 2021 but remained lower than 2020 levels. A ~23 percent rise in typo traps and (more worryingly) a ~25 percent rise in pristine traps drove this upward trend.

There is one notable variance between the two years: The Black Friday/Cyber Monday skyscraper of 2020 did not repeat in 2021. Instead, the broader but flatter increase in trap hit activity across Q4 suggests senders intentionally implemented “scrubbing” campaigns before the big event to reduce the impact when it counted most.

Forecast for 2022

MPP will make it more difficult to manage recycled traps. Subscribers will appear to regularly open their emails, but in reality, may become increasingly disengaged. As this signal becomes progressively unreliable, more dormant addresses will be converted into recycled traps and deliverability will become more difficult.

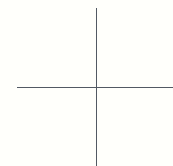
How to Adapt

- ➔ **Monitor spam trap hits.** Less than one-third of senders monitor their spam trap activity, according to [research from the DMA](#). But if you don’t measure it, you can’t manage it.
- ➔ **Prevent traps during acquisition.** Prevention is often the best cure. Poor permissioning practices make your reputation more vulnerable to pristine traps. Robust opt-in models, like confirmed opt-in and double opt-in, will significantly reduce the likelihood of pristine traps. As will solutions like CAPTCHA, which prevent bot-driven sign-ups.
- ➔ **Practice good recency management and list hygiene.** Robust recency management calls for dormant addresses to be suppressed when they exceed a pre-determined threshold. This significantly reduces the risk of recycled traps. On average, senders suppress addresses after five months of inactivity. You should do so sooner now that Gmail prompts subscribers to opt out after 30 days of inactivity.

Chapter 3.

Engagement





ENGAGEMENT

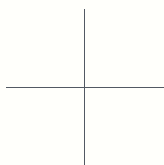
Open Rate and Click Rate

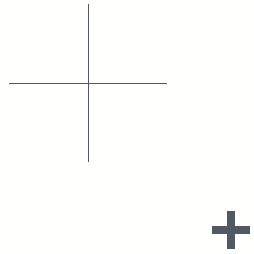


Historically, senders have measured subscriber engagement using open rates and click rates.

Over the past few years, the accuracy of open rates has come into question. Factors like image caching, spam filter testing, and even bot-driven registrations can skew this metric significantly. The arrival of Apple’s MPP made open rates even less reliable. Most emails received by Apple Mail users now register as “opened” due to automatic downloads of the open tracking pixels.

Nevertheless, opens from non-MPP sources continue to provide rich behavioral data about these subscribers. And even MPP “opens” are useful to confirm if email addresses are valid.





What Happened in 2020-2021

[Figure 9]

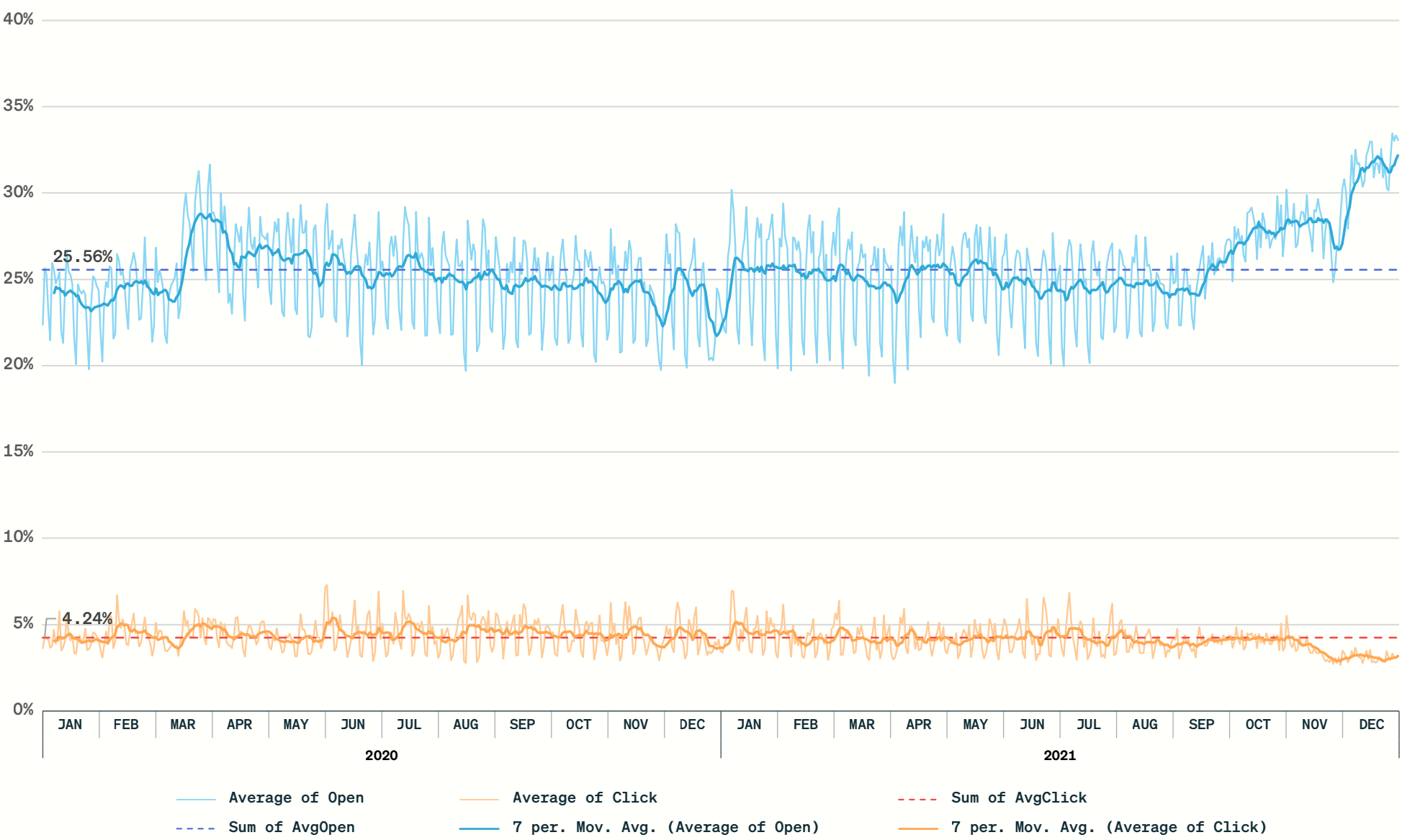


Figure 9 shows unique opens and clicks. By “unique,” we mean that no matter how many times a subscriber clicks or opens an email, their interaction is represented as a single event. Both metrics are then calculated using the base of total emails sent.

In 2021...

- The average unique open rate was 25.5 percent.
- The average unique click rate was 4.2 percent.

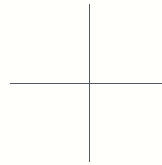
Of course, the headline story for open rates in 2021 was the introduction of Apple’s MPP in September.

Pixel tracking images suddenly downloaded automatically at the time of email delivery, which significantly inflated open rates—open rates increased by one-third in Q4 alone.

The Black Friday/Cyber Monday dip in open rates is notable. Increased sending volume contributed to this decrease in part, but this movement also suggests subscribers moved back to more traditional devices (desktops and laptops) to make purchases.

Click rates in 2021 were less volatile than open rates, averaging 4.3 percent from January to September. However, there was a marked decline towards the end of the year: Average clicks dropped to 3.6 percent. This can be attributed to the higher sending volume during Black Friday/Cyber Monday and throughout the holiday season.

In 2020, click rates bounced back quickly after Cyber Monday. But 2021’s impact appears to be more permanent. This may be an early warning of subscriber fatigue—and an unforeseen consequence of MPP.



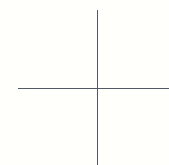


Forecast for 2022

As MPP adoption continues, average open rates will increase and likely level out between 35-40 percent. To get a true picture of open rates, senders will need to separate MPP and non-MPP data.

Furthermore, Clicks appear to be under pressure, and senders will have to work harder just to maintain parity with prior years' performance.

“Email marketers should spend more time analyzing how subscribers engage with email content—including subscribers with disabilities.



How to Adapt

- ➔ **Implement BIMl.** Brand recognition in the inbox is critical: [DMA research](#) reveals “recognizing the brand” is the most important driver of email opens (even more than subject lines). Senders should implement [BIMl](#) (Brand Indicators for Message Identification) to display brand logos next to their emails in subscribers' inboxes.
- ➔ **Drive more clicks.** MPP means many senders are pivoting from opens to clicks as their preferred indicator of subscriber engagement. The challenge is, the average opens-to-clicks ratio is ~6:1. Suddenly, that 10k email test send is only giving you about 400 clicks to make decisions on instead of 2,500. So, tactics like A/B split testing will require larger sample sizes to provide statistically significant results.
- ➔ **Think accessibility.** Email marketers should spend more time analyzing how subscribers engage with email content—including those with disabilities. To make emails accessible to every audience, senders should consider factors like plain text, generous use of white space, and color contrast using dark mode.

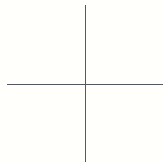


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ENGAGEMENT

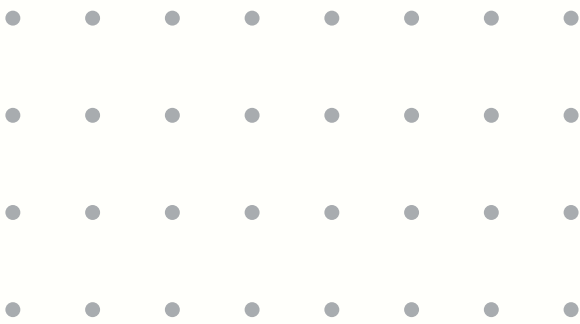
Unsubscribe Rate

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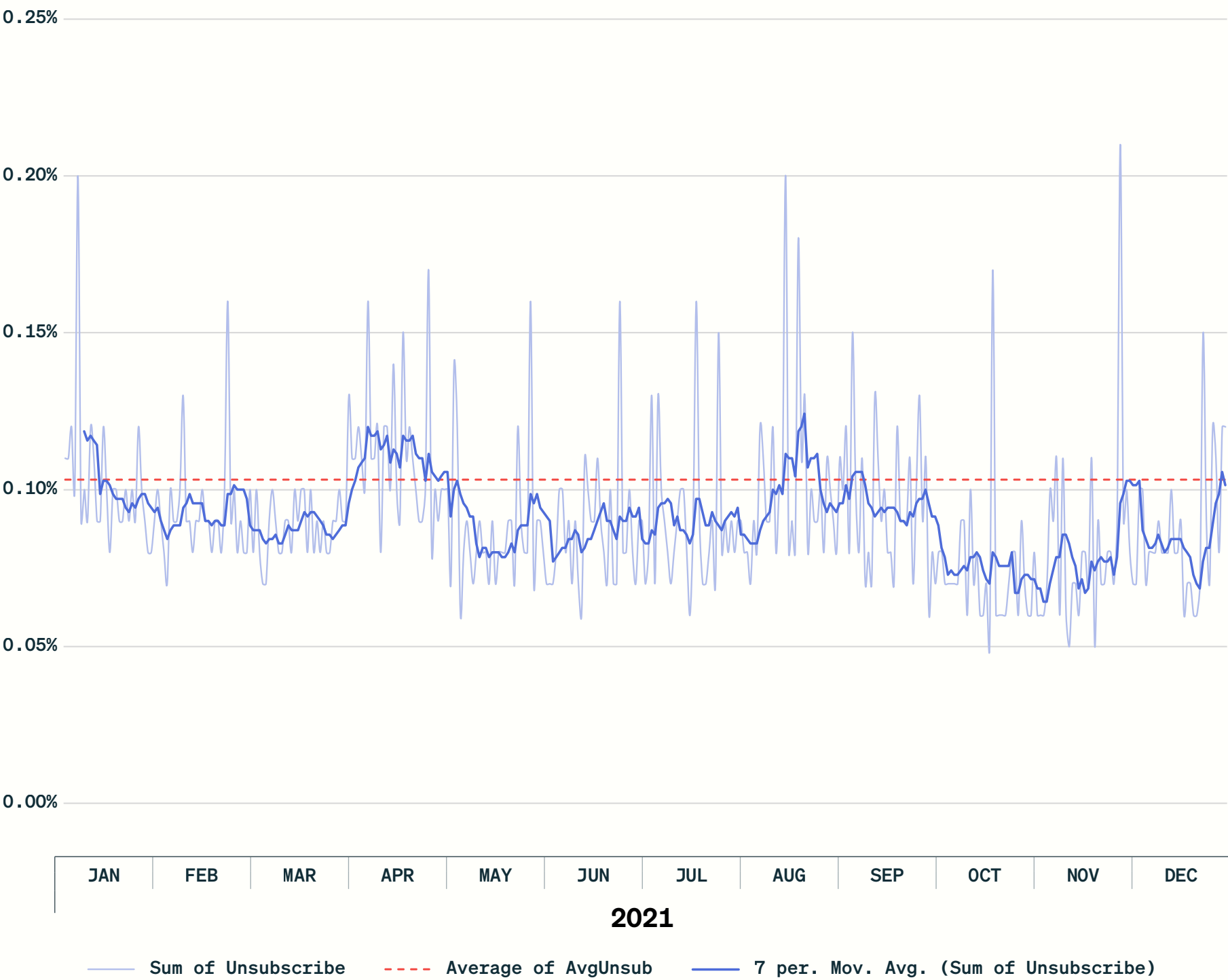
Consumers unsubscribe from email programs for many reasons. The DMA (UK)’s [Consumer Email Tracker 2021](#) report (sponsored by Validity) shows the biggest driver is “too many emails,” followed by “lack of relevance” and “failure to recognize sender.” Interestingly, around 20 percent of unsubscribes result from external factors, such as negative press or a poor in-store experience.

Email marketers often view their unsubscribe rate as a negative metric. In reality, unsubscribes are a natural part of the subscriber lifecycle and far preferable to receiving spam complaints.



What Happened in 2021

[Figure 10]



In 2021, **the average unsubscribe rate was 0.1 percent.**

When Gmail introduced prompts encouraging subscribers to opt out of irrelevant programs, senders grew concerned that unsubscribe rates would spike. Fortunately, the opposite happened: The increased visibility engendered higher levels of consumer trust, and even prompted subscribers to revisit email programs they hadn’t looked at in a while.

Unsubscribe rates trended downward throughout the year, illustrating email marketing’s broad shift towards greater relevance and empathy.

It’s noticeable that two peaks occurred during periods when COVID-19 restrictions loosened. This may be because the travel industry went into overdrive to promote summer holidays. Since many consumers were still nervous about travel, messages about overseas holidays were far less relevant.

One of the biggest spikes in unsubscribe rates occurred at the beginning of 2021, which suggests many subscribers re-evaluated their email subscriptions as part of their New Year’s housekeeping. This includes those who subscribed to a program solely to receive holiday promotions.

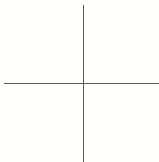
Spikes on other key dates like Valentine’s Day and Mother’s Day highlight the risk of sending less-relevant content during high-volume periods.

Forecast for 2022

The unsubscribe rate dropped sharply in September 2021, coinciding with the introduction of Apple’s MPP. At first glance, this is a positive shift, but may be offset by the increase in the spam complaint rate (see prior section).

It’s possible that automatic loading of images means more scrolling to find the unsubscribe link, which is usually located in the email footer. Senders may see this metric continue to decrease—but this isn’t necessarily a good thing.

“Unsubscribes can be a valuable learning opportunity.”



How to Adapt

- ➔ **Prioritize frequency and relevance.** Don’t guess what your subscribers want from your program—ask them! Build a preference center that empowers subscribers to control the topics and frequency of emails they receive. Links to this center should be clearly visible and regularly promoted.
- ➔ **Take a snooze.** Sometimes subscribers want a temporary break from email—for example, if they aren’t in a relationship on Valentine’s Day. This is where “snooze” functionality is key. Research shows senders who provide a “snooze” option in their preference centers see unsubscribes decrease by 82 percent.
- ➔ **Learn from mistakes.** Unsubscribes can be a valuable learning opportunity. Include an exit survey in the opt-out process to gain valuable subscriber feedback about what went wrong. Then, tailor your program accordingly.
- ➔ **Consider external sentiment.** Factors outside the email program drive unsubscribes —and senders should respond appropriately. For example, scale back on email activity if your business was featured in an unflattering news report.

Chapter 4.

Conclusion



CONCLUSION

Key Takeaways



1. Email's new normal is here to stay

- Global email volume will continue to increase, meaning added pressure on deliverability and more competition in subscribers' inboxes. In this email climate, it's critical to maintain a top sender reputation and observe established best practices.

2. Senders haven't yet seen the full impact of MPP

- While nearly all senders saw inflated open rates following the September rollout of MPP, they experienced limited actual impact on their email performance. As a result, many senders have been complacent about MPP.

Unfortunately, the negative trends in complaints, opt outs, and SRD detailed in this report signal that MPP may have unexpected consequences. Senders should be on the alert for signals like these as MPP adoption increases. It's like watching Jaws: You haven't seen the shark yet, but the eerie music is starting.

3. Relevant, empathetic messaging matters

- The COVID-19 pandemic taught senders important lessons about achieving the right balance of commercialism and empathy in email.

Senders who failed to adopt the appropriate tone saw high complaint rates and unsubscribes in 2021. As competition in the inbox increases, senders need to find ways to give their emails a human element and sell with sensitivity.



CONCLUSION

How Validity Can Help

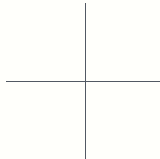


Despite a turbulent few years, the email channel is proving more relevant than ever.

While this is good news for email marketers, this resilience is one of the reasons why email is so challenging. The ongoing quest for greater relevance, stronger engagement, and larger ROI means the channel innovates at a ferocious pace. It’s difficult to keep on top of what’s happening today, never mind tomorrow.

For some, the best way to stay ahead of the curve is to find a technology partner like Validity.

The Validity suite of email solutions helps senders achieve best-in-class performance across all areas mentioned in this report.



Everest, our email success platform, provides unparalleled insights and deliverability guidance to help senders increase engagement and achieve maximum program performance.

BriteVerify, the industry’s longest standing contact verification solution, provides secure, scalable list validation, so senders can reach more people and communicate more effectively.

To learn how Validity can help you master the new email landscape, [talk to our team of experts today.](#)

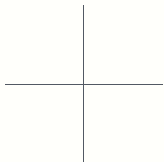




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CONCLUSION

Methodology



State of Email 2022: Mastering the New Email Landscape

draws from the Validity global data network, **the largest email data network in the industry.**

Validity has assembled a rich email heritage—built from the combined forces of BriteVerify, Return Path, and 250ok. We partner with over 100 mailbox providers and security companies to obtain data on 2.5 billion mailboxes around the world. As a result, we analyze over 3 trillion data points per year (10 billion per day).

The Validity data network is augmented by a deep bench of internal email experts. With decades of email experience under their belts, the experts at Validity infused their continuous learning into this report.



CONCLUSION

Glossary



BLOCK

A refusal by a mailbox provider or mail server to accept an email message for delivery. Many mailbox providers block email from IP addresses or domains that have been reported to send spam or viruses, or have content that violates email policy or spam filters.

CLICK-THROUGH RATE

Click-through rate is calculated by dividing unique clicks by the volume of email delivered. It is typically expressed as a percentage.

CLICK-TO-OPEN RATE

This rate is measured by calculating the ratio of unique clicks to total unique opens. Click-to-open provides valuable insight into the effectiveness of your email content and design.

COMPLAINT RATE

Complaint rate shows how often subscribers complain to mailbox providers about receiving email from a brand. It is calculated by dividing the number of spam complaints by the number of emails delivered. Complaints are a strong indicator of negative engagement, and this metric is useful for identifying patterns and sources of complaints.

CONVERSION RATE

Conversion rate is the percentage of subscribers who follow the call to action in an email message. It is calculated by dividing the number of conversions by the number of visits. Although a strong indicator of subscriber engagement, this metric typically speaks more to the quality of landing page or website content than email content.

DELIVERABILITY

Email deliverability refers to the number of emails delivered to the subscriber’s inbox. This key metric helps marketers understand the efficacy of their email program and whether they are maximizing brand visibility to drive conversions.

Email deliverability should not be confused with emails delivered. Delivered refers to emails that were successfully accepted by the mailbox provider. It does not represent the rate or number of emails placed in the inbox or spam folder.

FEEDBACK LOOP (FBL)

A feedback loop (FBL) is a service offered by mailbox providers, in which they provide copies of complaints generated when subscribers report a sender’s messages as spam. While there are some differences in the way mailbox providers administer their FBLs, they generally operate in the same way by sending a copy of the offending email with full email headers.

GLOSSARY

HARD BOUNCE

Message sent to an invalid, blocked, or nonexistent email account. Typically, hard bounced emails can be identified with a 500 series SMTP reply code.

INBOX PLACEMENT RATE (IPR)

Inbox placement rate (IPR) is the rate of emails that were delivered to the inbox rather than the spam or junk folder. IPR is calculated by dividing the number of emails delivered to the inbox by the total number of emails sent.

INACTIVES

Also referred to as “non-responders.” Defined as the email recipients who have not taken any action on a sender’s emails (opens, clicks) within a certain amount of time.

LIST HYGIENE

The process of cleaning email address files to ensure the removal of invalid, inactive, and unsubscribed email addresses, as well as subscribers who have reported messages as spam (spam complaints).

LIST-UNSUBSCRIBE

The List-Unsubscribe header is an optional email header senders can add to messages. It allows subscribers to see an unsubscribe button they can click if they would like to automatically stop receiving that sender’s email. List-Unsubscribe is currently being used by Gmail, Outlook.com/ Hotmail, and Cloudmark.

MAILBOX PROVIDER (MBP)

A mailbox provider (MBP) is an organization that provides users with email accounts and accepts and delivers large amounts of email.

Types of MBPs include:

- **Internet Service Providers (ISPs):** Comcast, CenturyLink, and Verizon are examples of mailbox providers that provide internet access as their core business. Because it is not their focus, their email service may lack some of the interesting features that are typically offered by MBPs who focus primarily on email.
- **Web-based MBPs:** AOL Mail, Outlook.com Mail, Yahoo Mail, and Gmail are the most popular web-based email providers. They attract users because they are free and can advertise their services on every message.
- **Premium, or hosted, email services:** Tucows and Rackspace are two of the major paid email services typically used by small organizations and businesses.

OPEN RATE

Open rate is calculated by dividing the number of emails opened by the number of emails delivered.



GLOSSARY

PRISTINE SPAM TRAPS

Email addresses created solely to capture spammers (sometimes referred to as honey pots). These email addresses were never owned by a real person, do not subscribe to email programs, and, of course, will not make purchases. Many spam trap operators will post (seed) pristine traps across the Internet on various participating websites. They are usually hidden in the background code of webpages and are acquired by a spambot scraping email addresses. If you're hitting pristine traps, this typically indicates you have a bad data partner.

SENDER REPUTATION

Sender reputation is how mailbox providers measure the trustworthiness of an email program. Mailbox providers use sender reputation to determine if emails should be delivered to the inboxes, the spam folder, or blocked completely. A poor sender reputation results in fewer emails delivered to your subscribers' inboxes, which can reduce conversions and, ultimately, ROI.

SOFT BOUNCE

Email sent to an active (live) email address, but which is turned away before being delivered. Often, the problem is temporary (e.g., the server is down or the recipient's mailbox is full). The email might be held at the recipient's server and delivered later, or the sender's email program may attempt to deliver it again. Typically, soft bounced emails can be identified with a 400 series SMTP reply code.

SPAM TRAP

A spam trap is an email address or server specifically designed, maintained, and monitored to catch abusive email traffic. A high spam trap rate will result in a low sender reputation.

SPAM RATE

Also known as the complaint rate, this is the rate of emails that are marked as junk/spam by recipients, typically expressed as a percentage over total number of emails delivered.

SUBSCRIBER

A person who allows a brand to send email messages to them.

THROTTLING

The practice of regulating how many email messages are sent to one mailbox provider or mail server at a time. Some mailbox providers bounce email if they receive too many messages at once.

UNKNOWN USER

Bounce error code generated by a mailbox provider when an email address is invalid or unrecognized.

UNSUBSCRIBE RATE

Unsubscribe rate is calculated by dividing the number of unsubscribes by the number of emails delivered.





Businesses run better and grow faster with trustworthy data. Tens of thousands of organizations rely on Validity solutions – including Everest, DemandTools, BriteVerify, and GridBuddy Connect – 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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