



# 2026 Email Deliverability Benchmark Report

**An Analysis of Inbox and Spam  
Placement Rates Worldwide**

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# INTRODUCTION

Year after year, email delivers the strongest ROI of any marketing channel.

Its low cost and wide reach make it ideal for businesses looking to scale and build meaningful connections with their audiences.

But even the best-designed email campaigns fall flat if they don't reach inboxes. That's why email deliverability isn't just an IT issue—it's a critical marketing and revenue challenge.

Deliverability is only getting more complicated—mailbox provider updates, AI advancements, and new privacy laws are all reshaping how marketers reach subscribers.

In this report, Validity's exclusive data network—powered by trillions of data points from global inboxes—reveals global email deliverability performance in 2025 and actionable tactics for marketers to stay ahead in 2026.

## Here's what to expect:

- An analysis of global email deliverability, including inbox placement, spam filtering, and missing emails.
- Expert advice to optimize deliverability with top mailbox providers.
- A look at global reputation metrics to see how mailbox providers view sender behavior.
- Industry-specific insights into email performance and deliverability.
- Practical steps senders can take now to boost their email success.

# KEY FINDINGS

1. Global inbox placement **improved in 2025**, as new MBP requirements and AI pushed senders to up their game.
2. Global sending volume **decreased YoY** for the first time in this report's history as marketers prioritized smaller, higher-value lists.
3. Mailbox providers are prioritizing user engagement as a primary trust signal—and brands that don't adapt their strategies **risk losing inbox visibility**.
4. Microsoft remains **the toughest MBP to send to** (for now!) with a 77.4 inbox placement rate.
5. Europe remains the **top-performing deliverability region**. South America was the most improved region.



# WHAT IS DELIVERABILITY?

Before diving deeper, let's start with the basics: What is deliverability?

[Deliverability](#) is a sender's ability to reach the inbox—not the spam folder.

Don't confuse deliverability with delivery—the two metrics are fundamentally different.

Delivery, often shown as the “delivered rate” in your email service provider (ESP) dashboard, only tracks whether an email was accepted by the recipient's mail server. It doesn't guarantee that your email reached the inbox. Emails can land in several other places—like the spam folder or blocked at mailbox provider (MBP) gateways.

The delivery rate your ESP shows is a simple “sent minus bounced” calculation—which just doesn't tell the full story. While delivery metrics show how many emails the server accepted, they don't explain where those emails landed. Did they reach the inbox or get buried in the spam folder?

Ignore deliverability, and your emails may never reach the audience you worked so hard to win—meaning your time, effort, and budget go to waste.

Validity measures deliverability with the following metrics:

## Inbox placement rate

The number of emails delivered to the inbox out of total emails sent. Inbox placement rate (IPR) is the most accurate way to measure deliverability, since it directly measures how many emails were delivered to the inbox.

## Spam placement rate

The number of emails delivered to the spam folder out of total emails sent. It shows the percentage of emails marked as unsolicited bulk email or spam by the receiving MBP's spam filtering system.

## Missing rate

The percentage of mail that did not arrive in the inbox or spam folder and was instead deferred or blocked by the MBP.



# 2025'S MAJOR EMAIL DEVELOPMENTS

2025 was another chaotic year for email senders: Microsoft introduced [stricter bulk sender requirements](#), [AI entered inboxes](#) through email summaries and agentic assistants, and we saw privacy laws like [CCPA](#) in action.

Below, you'll find a timeline of the major events that shaped deliverability in 2025.



As you might expect, 2026 is shaping up to be another year of massive industry shifts. So, how can marketers stay ahead of these changes? It all begins with a strong deliverability strategy.



# GLOBAL DELIVERABILITY

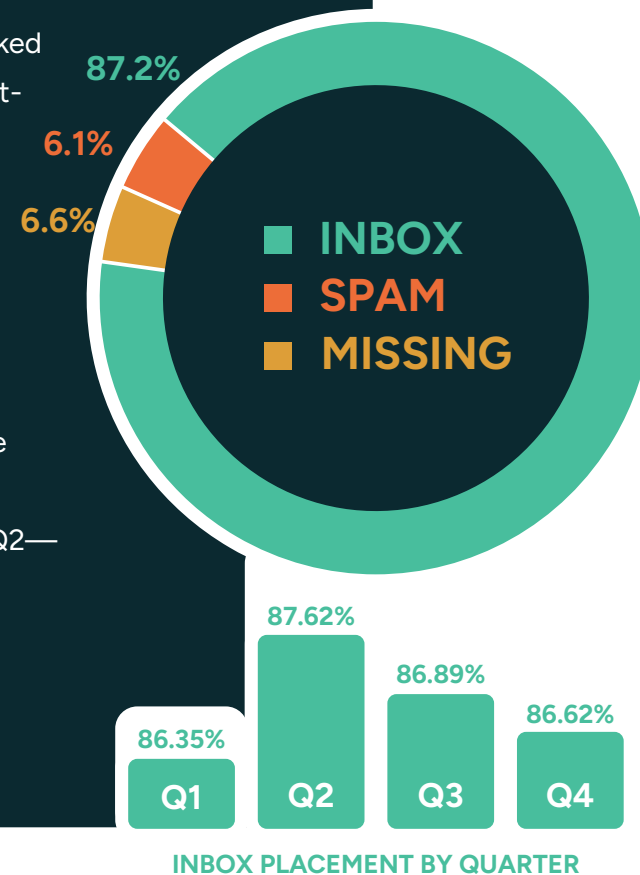
## What happened in 2025?

The average global inbox placement rate for 2025 was 87.2 percent—a 3.7 percent uplift year over year. However, performance varied significantly by MBP, region, and industry—which we'll explore later.

The overall uplift in IPR comes in part from a reduction in missing rates. Fewer emails were blocked or rejected by mailbox providers, meaning MBPs trusted more senders were legitimate and trusted recipients to decide if they wanted messages or not.

Beyond the decrease in missing rates, a range of factors contributed to better global IPR:

- **New bulk sender requirements:** Over the past two years, [Gmail, Yahoo, and Microsoft](#) introduced mandatory guidelines for high-volume email senders. These requirements include [DMARC](#) authentication, one-click unsubscribe options, and low spam complaint rates. While long considered best practices, making them mandatory has improved subscriber trust, engagement, and yes, deliverability. Microsoft's rollout explains the upswing we see from Q1-Q2—already-compliant senders benefitted as Microsoft recognized their DMARC status.



## GLOBAL DELIVERABILITY

- **New laws:** European senders benefit from a “GDPR halo effect”—a boost in reputation, trust, and data quality that comes from implementing strong data protection standards. Now, the more recent EU [Artificial Intelligence Act](#) and [European Accessibility Act](#) are making best practices into legal requirements, and we expect to see similar results. In the US, nearly half of states now have new-generation privacy laws, and new laws around practices like [misleading subject lines](#) incentivize senders to do the right thing.
- **Accessibility:** [Email accessibility](#) is on the rise—and it’s a win-win for marketers and subscribers alike. Making emails easier to engage with helps senders reach more potential customers. Plus, many accessibility-friendly tactics are also proven email best practices that boost deliverability and engagement.



Misleading subject lines carry real risk. Deceptive tactics can damage trust and expose brands to significant legal fines.

[Learn more](#)

# AI'S INFLUENCE

AI is already influencing almost every aspect of email marketing—but it's shaping deliverability in these areas specifically:

- AI helps senders [personalize content](#) at scale, using intelligent tactics such as subject line testing, behavioral segmentation, and product selections—leading to better engagement.
- MBPs are adding AI to inboxes in ways that put a greater focus on engagement. Functionality like subscriptions management and [relevance-sorted](#) inboxes reward senders whose emails get the most interaction.
- AI isn't just helping marketers—cybercriminals are using it to create more convincing fraudulent emails. This gives legitimate senders another reason to strengthen authentication and security to protect customers.

ESPs have responded swiftly to these changes. The top features [users want in new sending platforms](#) are AI-powered segmenting and targeting. A new generation of ESPs is quickly filling this need.

The AI revolution also means email senders can level up their craft in new ways. As AI automates manual tasks like data selection and copywriting, marketers have more time to focus on strategies to build lasting, profitable customer relationships.



SpamGPT is actually a real thing! Learn more about how AI has entered the inbox in this episode of the Email After Hours podcast.

Watch now

# GLOBAL SENDING VOLUME

## What is it?

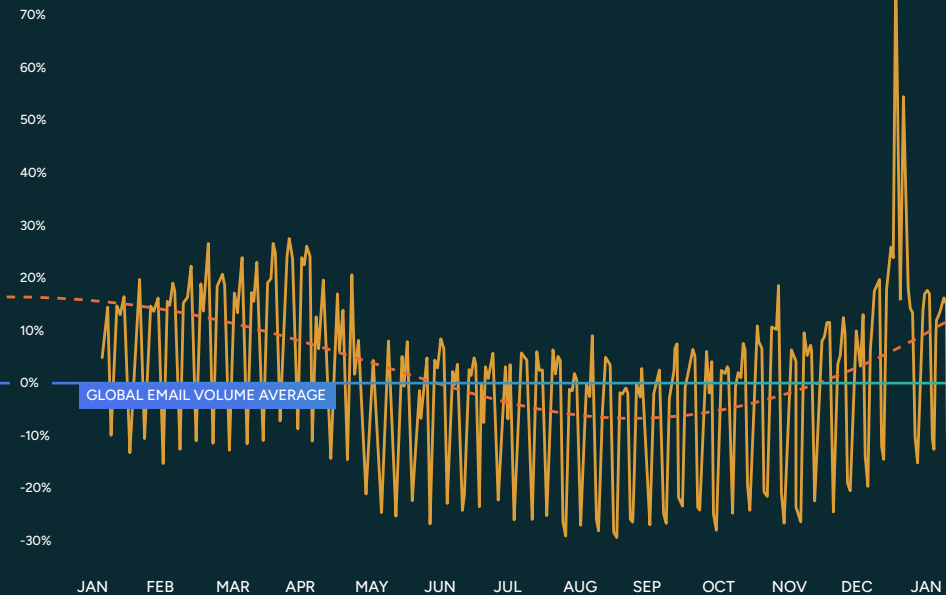
Sending volume refers to the frequency *and* quantity of global email sent. Why is it important for deliverability? MBPs pay close attention when sending behavior is inconsistent or increases suddenly.

## What happened in 2025?

In 2025, average sending volume fell between March and April, then stayed subdued through summer in the Northern hemisphere. This slowdown started when Yahoo began enforcing [new bulk sender requirements](#) and [Microsoft introduced new requirements](#) with immediate enforcement. Sending volumes then followed their typical pattern, spiking during the Q4 holiday sales season.

For the first time, there was a clear year-over-year reduction in sending volumes. This is likely due to the combination of new MBP guidelines and AI's effectiveness in helping marketers send smaller, more targeted, and higher-value campaigns.

## Global Email Volume Trend



## GLOBAL SENDING VOLUME

### Guidance for senders

When it comes to finding the right sending volume, it's not as simple as using a "less is more" strategy.

### Senders should consider:

- Average revenue per email is much higher for triggered sends like browse abandonment emails—often [10-15 times](#) higher. Last year, a mere two percent of total email volume accounted for [37 percent of all email-driven sales](#). In 2026, a new trend will arise. Senders will use "micro moments"—tiny indicators of intent like viewing a product for more than a number of seconds, changing price filters but not adding items to carts, or zooming in on product images, as triggers for automated follow-up messaging.
- [AI](#) powers better targeting, [segmentation](#), [personalization](#), and product suggestions. Focus on smaller, more relevant audiences, and revenue will follow. But remember to use AI carefully—reaching and connecting with humans is always the ultimate goal.
- Email's role in the inbox is like that of a billboard. Not all subscribers will click through—they may read the email, then visit a physical store, browse the brand's website, read product reviews, or simply remember the brand for future purchases. These are all positive actions, so don't jeopardize relationships (and revenue) by suppressing these subscribers based on metrics like opens and clicks.
- Average sending volumes are much lower over the weekends. As we'll show in the following sections, negative reputation metrics like spam complaints, unknown users, and rejected rates also trend downward on weekends. Senders should try sending more on Saturdays and Sundays, when competition is lighter, and subscribers have more time to engage.



# SPAM COMPLAINTS

## What is it?

Spam complaint rates are driven 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. But there’s a key difference: high spam complaint rates negatively impact a sender’s reputation and deliverability—unsubscribes don’t.

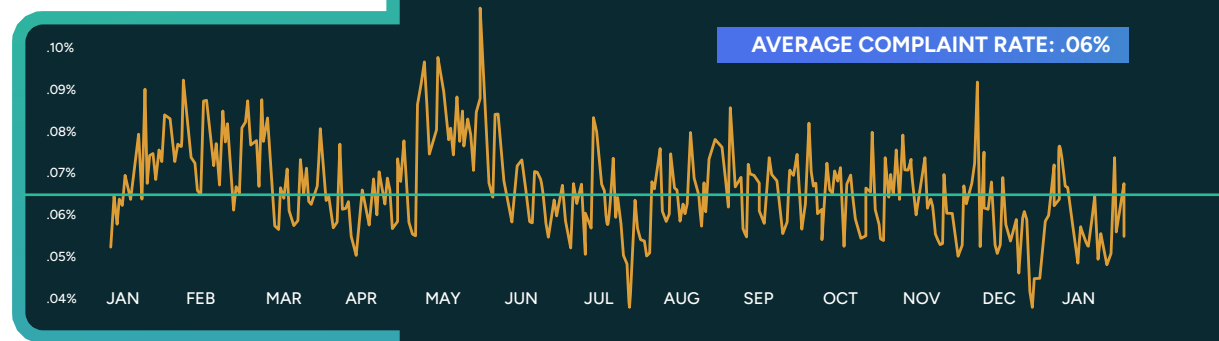
## What happened in 2025?

This is a good news story—spam complaints trended downward across the year, even during the high-pressure holiday season.

There are two primary reasons why:

- New bulk sender requirements from all major MBPs pushed senders to implement best practices like authentication and easy opt-outs.
- AI-driven targeting and segmentation helped marketers send more relevant content that resonated with subscribers.

MBPs rely heavily on spam complaint rates to make deliverability decisions, which helps explain the improved inbox placement rates we saw in 2025.



## Guidance for senders

- In 2026, spam complaint rates will continue to provide important signals for MBPs— especially now that [inboxes are sorted by relevance](#). While guidance over the years told senders to keep their spam complaint rates below 0.2-0.3 percent, under 0.1 percent is now the expectation.
- Again, spam complaint rates are lower on weekends, likely because fewer brands send emails and subscribers have more time to engage. Senders should consider testing more sends on Saturdays and Sundays to take advantage of this trend.

# UNKNOWN USERS (HARD BOUNCES)

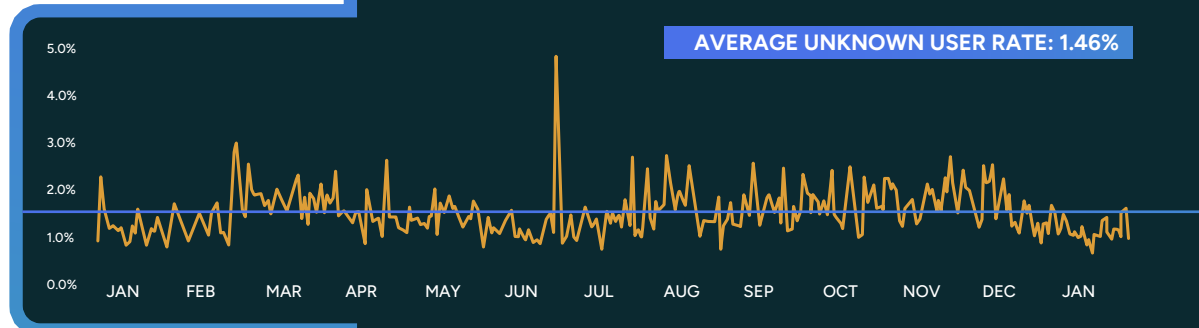
## What is it?

Unknown users are invalid addresses in a sender's database—in other words, Validity's language for hard bounces. Having high levels of unknown users on your list sends negative signals to MBPs, degrading your sender reputation and lowering your inbox placement rate.

## What happened in 2025?

Unknown user rates stayed flat throughout the year, because two opposing factors canceled each other out:

- MBPs enforced compliance with their bulk sender guidelines, leading to a rise in bounce activity.
- Senders focused more on email address quality, validating new addresses at the point of collection and throughout the subscriber lifecycle—meaning fewer bounces.



## Guidance for senders

- Monitor bounce rates, and review the codes provided in your bounce logs to help understand why they were generated. Google now includes SMTP rejection data in DMARC reports for increased visibility—and [Sender Score's bounce lookup tool](#) can also help.
- Use an email verification tool like [BriteVerify from Validity](#) to confirm that new contacts are valid and remove old addresses that have become invalid over time.
- Keep in mind that MBPs close inactive email accounts—Yahoo after 12 months and Gmail after 24 months—meaning bounces are more likely when mailing to older lists.



# REJECTED RATE

## What is it?

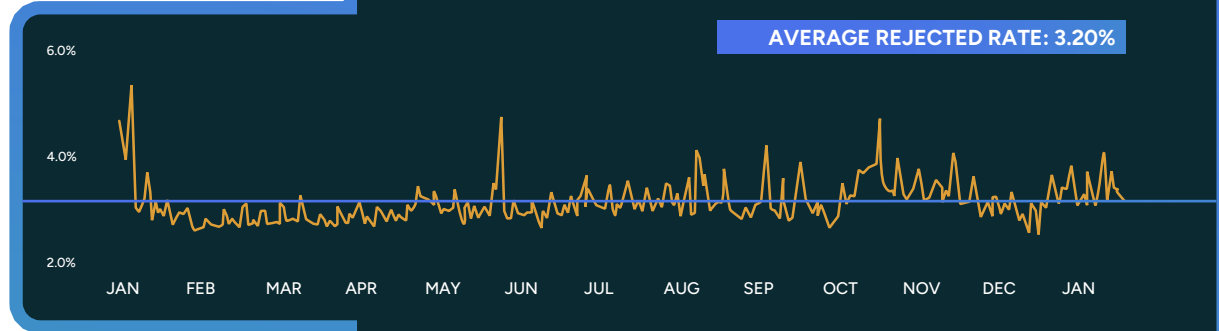
Sender rejection happens when MBPs intentionally block emails sent to their servers. These decisions are based on reputation drivers like complaint rates, spam trap hits, unknown user rates, third-party filtering, and blocklistings.

## What happened in 2025?

Rejected rates were below average for most of the year, reflecting senders' awareness of (and compliance with) Yahoo, Gmail, and Microsoft's bulk sender requirements. However, during the high-pressure holiday sales season, rejection rates spiked as senders ramped up email volume in an effort to meet revenue goals. MBPs reject senders who suddenly increase their sending volume, partly because their systems can't handle the surge.

## Guidance for senders

- During high-volume periods, MBPs prioritize senders with higher reputations—so monitor yours with Sender Score. Aim to keep your Score consistently above 90.
- Mailbox providers see 70 percent of their inbound activity during the first ten minutes of each hour. Offsetting your sending times to avoid these windows will result in faster delivery and better inbox placement.



**Note the spike in rejections at the start of the year. There are three likely explanations:**

- Many subscribers start the year by re-viewing their inboxes and deciding which emails they no longer want. They'll often use the "mark as spam" button as an easy way to opt out—so make sure unsubscribe links are prominent, and easy to use instead.
- Time-sensitive offers from December may no longer be relevant, so consider using Gmail's Annotations to remove expiry dates after a defined period.
- Subscribers tend to spend less in January, so reduce high-pressure promotional tactics during this time.



# MAILBOX PROVIDER OVERVIEW

Gmail remains the top global mailbox provider with 42.9 percent of total market share—slightly down from last year’s 47.8 percent.

Microsoft takes second in most major territories (besides the US). Yahoo’s market share stayed steady—but will increase by 3.5 percent after its acquisition of ATT and Comcast.

These numbers highlight the uniformity of a typical email list. [MAGY providers](#) (Microsoft, Apple, Gmail, Yahoo) represent over three-quarters of global mailbox users. In some respects, this makes deliverability simpler, since they have similar expectations for senders. However, MAGY’s scale also means that if senders have problems with one of the “big four,” it will have a devastating impact across their program.

Validity’s [mailbox provider partners](#) at Gmail, Microsoft, and Yahoo, always share plenty of advice for email senders—but it usually boils down to one core principle: “Send email messages your customers want to receive!” Much of their published guidance comes back to this idea.

PROVIDER	MKT SHARE
Gmail	42.9%
Microsoft	14.4%
Yahoo	15.7%*
Apple	3.6%
Other	23.4%

\* Includes all local instances of Yahoo as well as ATT and Comcast.



## MAILBOX PROVIDER OVERVIEW

There's also a set of strongly recommended elements that are nearly universal across MAGY, including:

- Use of proper headers (From, To, Subject, Message-ID), reverse DNS, and PTR records
- Use of ARC headers to preserve authentication for forwarded emails
- Only sending to opted-in subscribers, and suppressing unsubscribes and bounces promptly
- Observing all relevant RFC standards

Even their optional “nice-to have” recommendations (proper IP segmentation, consistent branding, reply-able addresses, etc.) exist for a reason—they help senders run more effective email programs. And as we've seen before, today's nice-to-have requirements have a habit of becoming tomorrow's mandates.

It goes without saying that all providers expect senders to observe all applicable legislation (CAN-SPAM, GDPR, LGPD, etc.). They also encourage senders to observe the Messaging Anti-Abuse Working Group's Senders Best Communications [Practices Version 3.0](#).

REGION	INBOX	vs MAGY
Asia	75.6%	-10.8%
Europe	79.7%	-11.4%
North America	77.4%	-9.3%
Oceania	68.5%	-19.4%
South America	62.7%	-25.3%

### Regional MBPs

Notable regional mailbox providers include Orange in France, BigPond in Australia, United Internet in Germany, and BT Mail in the UK.

Programs sending in these countries and regions should pay close attention to local providers' requirements. Today, average inbox placement at regional MBPs lags MAGY providers by roughly 10–25 percentage points.

Why? Most email senders focus heavily on maximizing deliverability with the “big four” and pay far less attention to the rest of the ecosystem. That gap represents a missed opportunity: non-MAGY providers still account for nearly a quarter of the global MBP landscape.



# GMAIL

## What happened in 2025?

Gmail's average inbox placement rate was 89.8 percent in 2025, up 2.6 percent from the previous year. Overall improvements in Gmail's IPR can likely be attributed to improvement in email program quality following the launch of new [bulk sender requirements](#).

As 2025 began, Gmail had already soft-launched [Deal Cards](#), and the on-going auto-deployment of [Gmail Annotations](#) was a regular feature in the Promotions tab.

This was just the beginning. In 2025, Gmail innovated constantly, introducing changes like:

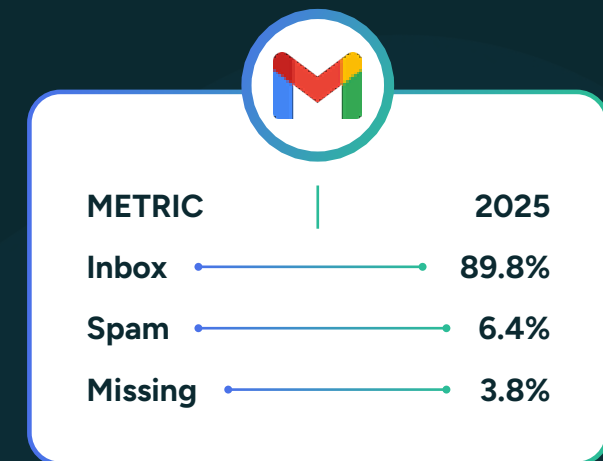
- The [Manage Subscriptions](#) feature
- The [Purchases tab](#) for online order tracking
- Engagement-sorted "Most Relevant" view of Promotions tab
- Deprecation of [Google Postmaster Tools v1](#)
- Stricter enforcement of bulk sender guidelines in November
- New "Change of Address" functionality

Gmail hit the ground running in 2026, announcing the integration of [Google Gemini into Gmail](#). This feature promises to transform the inbox,

letting users "ask anything" and get curated responses about their emails, while bringing high-priority messages to the top based on a user's existing contacts, response patterns, and engagement. (Because of privacy regulations, Gmail's AI is disabled by default in many countries outside the US.)

## 2026 Outlook

Predicting how this MBP's inbox placement rate will trend in 2026 isn't easy. Much of the new functionality is designed to reward high-engagement programs. Senders who see lower engagement will become less visible in Gmail inboxes. This, coupled with more aggressive enforcement of Gmail's sender requirements, makes it likely that overall Gmail deliverability will decline throughout the year.



# MICROSOFT

## What happened in 2025?

Microsoft (which includes Hotmail and Outlook) has traditionally been the toughest MAGY provider for deliverability. The average inbox placement rate for 2025 was 77.4 percent for 2025, a modest 1.8 percent uplift from the previous year.

However, this doesn't tell the full story—Microsoft introduced [bulk sender guidelines in 2025](#), leading to significant Q2 improvements as email programs already following Gmail and Yahoo's standards were rewarded for compliance with similar requirements.

Microsoft also had a busy year on the innovation front, introducing:

- Enhanced Smart Network Data Services (SNDS)
- Increases in Microsoft's Sender Reputation Data (SRD) rates in Q4

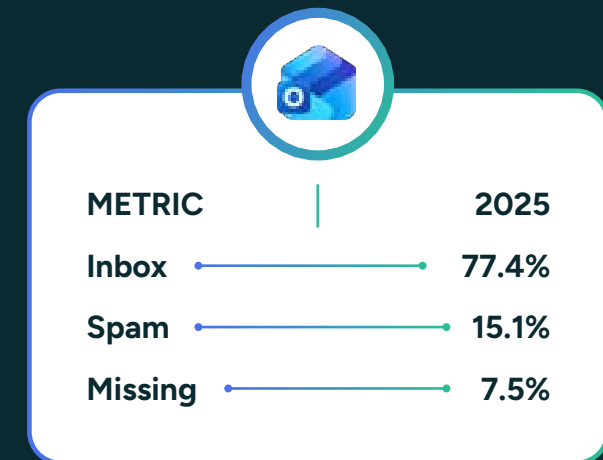
This last point merits further discussion. SRD comes from Microsoft's "Spam Fighters" program, in which participants are periodically asked if the marketing emails they receive are legitimate or junk. The percentage of negative responses forms the SRD rate and is used to calibrate Microsoft's spam filters.

In Q4, we saw an uplift in SRD rates, which may be a surprise consequence of Microsoft's improved inbox placement rates. More subscribers received SRD voting emails, but were asked to respond to emails from senders they hadn't seen for months (because of junk placement) and perhaps assumed they had already unsubscribed from.

SRD is an important engagement metric—almost like an NPS survey for email programs. Senders should pay close attention to it as engagement remains an ever-important driver of deliverability.

## 2026 outlook

We predict [Microsoft's](#) inbox placement rate will trend further upwards in 2026 as senders see the full benefits of compliance with Microsoft's bulk sender requirements.



# YAHOO!

## What happened in 2025?

Average inbox placement at Yahoo was 87.3 percent in 2025—only 1.3 percent higher than our previous report. Deliverability for this mailbox dipped in Q2, which likely coincided with the start of the migration of ATT and Comcast accounts into Yahoo.

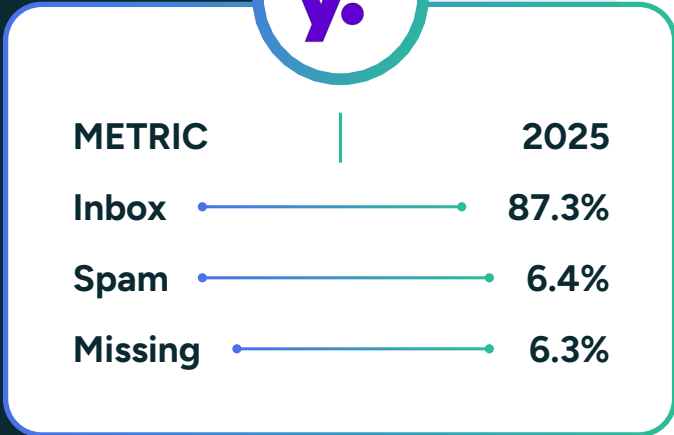
Yahoo introduced several notable developments in 2025, including:

- AI-powered [“Catch Up” feature](#) for inbox management
- Addition of “Insights” feature to the [Sender Hub dashboard](#)
- Updated desktop experience to include a “Priority” inbox tab
- Reduction of free storage limit from 1TB to 20GB
- Merger of ATT and Comcast

Senders looking to boost deliverability at this MBP should also be aware of Yahoo’s policy of permanently deleting email accounts that have been inactive for 12 months or more.

## 2026 outlook

In 2026, we predict Yahoo’s average inbox placement rates will see a short-term dip because of the ATT and Comcast merger (these providers reported deliverability of 80.3 percent and 76.8 percent respectively) followed by a recovery as these subscribers see improved inbox experiences at Yahoo.



**Looking for tips on sending to Yahoo inboxes?**  
Check out [their tips](#) and [our recommendations](#).

# APPLE

## What happened in 2025?

Apple Mail's average inbox placement rates rose to 82 percent—a 5.7 percent uplift from the previous year.

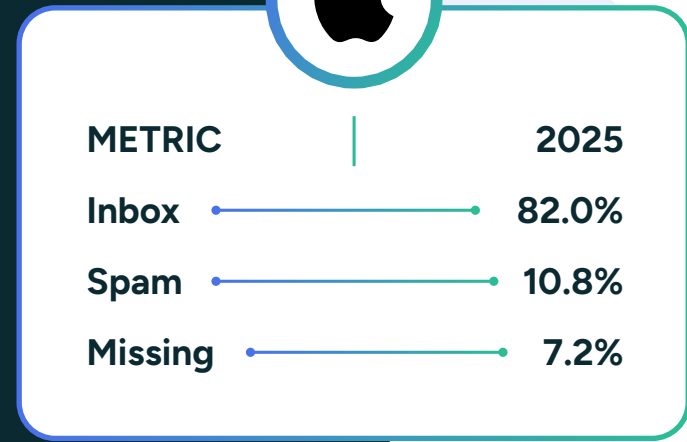
While Apple hasn't officially launched its own bulk sender requirements, it benefited from a halo effect as senders upgraded their performance to comply with other providers' new standards.

## Apple's key 2025 developments included:

- Redesigned Mail app (with inbox categories) extended to macOS and iPadOS users
- Introduced hidden "All Mail" view. The redesigned Mail app prompted plenty of feedback, including criticism over layout and inbox behavior
- Introduction of Apple Intelligence to identify priority messages, as well as enhanced sorting that pushes time-sensitive and important emails to the top of the inbox

## 2026 outlook

Apple has always emphasized the importance of generating strong user engagement. The Apple Mail [developments](#) described here, and the more general adoption of bulk sender guidelines, mean we should see inbox placement rates continue to trend upward for this MBP.



**Looking for tips on sending to Apple inboxes?**  
Check out their [best practices](#) and [our recommendations](#).





## **DELIVERABILITY BY REGION**

All the major regions we monitor for this report showed year-over-year inbox placement rate increases.

However, there are significant differences both in the scale of the changes and the underlying factors driving them.

# ASIA

Asia’s data is largely formed from email marketing activity in China and India. The current benchmark of 86.4 percent average inbox placement shows an impressive 8.3 year-over-year percent uplift, but masks big performance differences between the two countries.

## Country spotlight: China and India

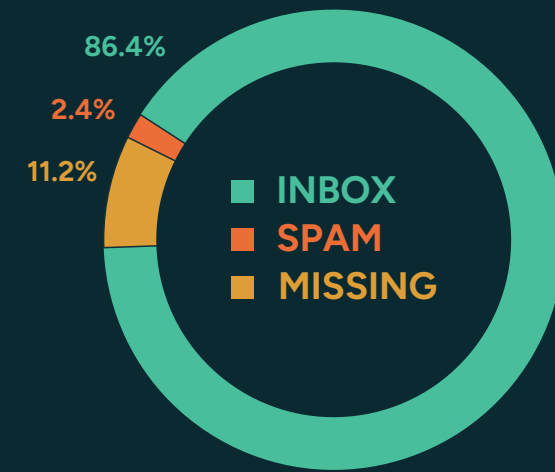
In China, most of Validity’s customers operate international programs and benefit from MAGY coverage of over 90 percent. This explains the country’s high average inbox placement rates (88.9 percent).

However, when it comes to China-specific MBPs like Tencent (QQ) and Netease (126.com, 163.com), it’s a different story—inbox placement rates average only 57.9 percent.

Reasons for this include the “The Great Firewall of China” which actively filters, throttles, and blocks international traffic, highly protective mailbox providers that use aggressive filtering to safeguard their users, and strict content and regulatory compliance requirements.

Average inbox placement rates in India are only 71 percent. This market is almost totally dominated by Gmail, with 89.7 percent coverage, followed by Russia’s Yandex with 5.0 percent. Although governed by a regulatory framework that covers consent, sender identification, and opt-out requirements, overall enforcement and structure differ significantly from EU-style privacy rules.

## INBOX PLACEMENT METRICS



## MAJOR MBPs

RANKING	MBP	MKT SHARE
1st	GMAIL	65.6%
2nd	YAHOO	15.0%
3rd	MICROSOFT	13.0%

COUNTRY	INBOX PLACEMENT METRICS			MAJOR MBPs		
	INBOX	SPAM	MISSING	1st	2nd	3rd
CHINA	88.9%	1.7%	10.7%	Gmail - 54.9%	Microsoft - 20.6%	Yahoo - 18.25%
INDIA	71.0%	13.0%	16.0%	Gmail - 89.7%	Yandex - 5.0%	Microsoft - 4.0%



# EUROPE

Europe remains the top-performing region on our list with an average inbox placement rate of 91.1 per cent—a two percent improvement from our previous report. The three biggest email markets in this region (France, Germany, and United Kingdom) all came in above 90 percent.

From a MBP perspective, this is a relatively diverse region, with MAGY only forming two-thirds of the total weighting. Regional providers like Orange in France, BT Mail in the UK, and United Internet in Germany, all have a significant presence, so email senders should pay attention to their specific requirements.

## Country spotlight: France, Germany, and the United Kingdom

France has the smallest MAGY representation of the main European countries we monitor, and a “long tail” of important local mailbox providers (e.g., Orange, SFR, La Poste) that senders must also monitor closely to ensure deliverability success.

Once again, Germany has the highest IPR of the countries we monitor—widespread use of double opt-in, mandatory requirement for “impressum” statements (privacy information), and the presence of the [CSA](#) all contribute to this country’s high performance.

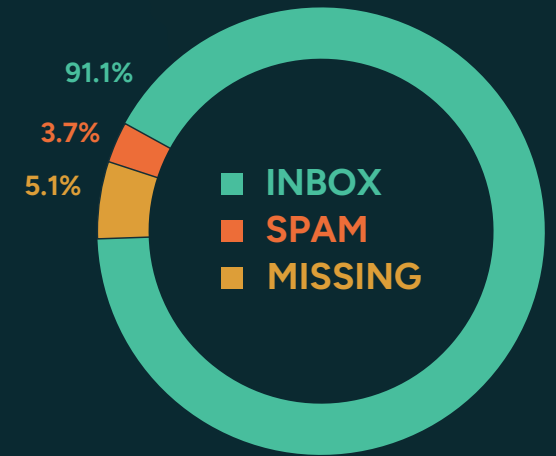
The UK still has a strong Microsoft flavor to its email lists—double the global average, which helps explain the strong improvement in inbox placement for this country following introduction of Microsoft’s bulk sender requirements.

*“Laws that govern email marketing in the UK have slowly diverged from the EU since Brexit, including the introduction of new laws such as UK GDPR. While still broadly similar to the original laws, email marketers need to be alert to potential changes. We’ve also seen the introduction of new laws such as the Data (Use and Access) Act 2025, with implications for marketers such as new definitions for legitimate interest.”*



**Guy Hanson, VP of Customer Engagement, Validity**

## INBOX PLACEMENT METRICS



## MAJOR MBPs

RANKING	MBP	MKT SHARE
1st	GMAIL	35.9%
2nd	MICROSOFT	18.2%
3rd	YAHOO	9.8%

COUNTRY	INBOX PLACEMENT METRICS			MAJOR MBPs		
	INBOX	SPAM	MISSING	1st	2nd	3rd
FRANCE	94.0%	3.7%	2.4%	Gmail - 24.3%	Microsoft - 10.5%	Orange - 7.4%
GERMANY	97.5%	1.9%	0.7%	Gmail - 38.5%	Microsoft - 10.8%	United Int. - 7.7%
UNITED KINGDOM	91.5%	1.7%	6.9%	Gmail - 42.6%	Microsoft - 27.4%	Yahoo - 13.6%



# NORTH AMERICA

North America's IPR improved 1.7 percent year over year. The region is MAGY-dominated (88.3 percent of all mailboxes) which will increase to 91.8 percent following the merger of ATT and Comcast with Yahoo.

## Country spotlight: United States and Canada

There is a three percent gap between inbox placement in the US and Canada, perhaps highlighting the performance difference created by Canada's stricter opt-out and opt-in consent models. Similar to Europe, email marketing in the United States benefits from new-generation privacy laws (which are now effective in 19 states), plus active bills in an additional [15 states](#).

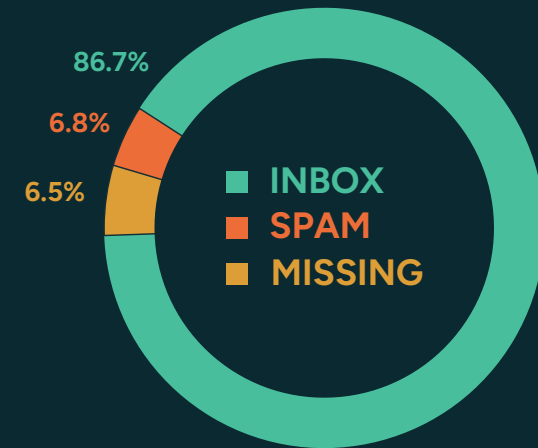
We've also seen the introduction of state-specific laws such as [Washington's Commercial Electronic Mail Act \(CEMA\)](#), which specifically prohibits commercial emails with false or misleading subject line information, or that misrepresent the sender's identity. Steep fines have already been imposed—and as these laws spread, they are likely to encourage senders to improve transparency, which will improve their programs' performance.

*"Validity's Email Strategists consistently hear how difficult it is to achieve (and maintain) Microsoft inbox placement. Microsoft's significantly larger footprint in Canada changes the challenges for marketers sending to Canadian audiences. Brands that prioritize Validity's Sender Certification will have a measurable advantage in reaching their Canadian subscriber's inboxes, as this program plays a pivotal role in mitigating risk and protecting inbox performance in this environment."*



**Danielle Gallant, Sr. Email Strategist, Validity**

## INBOX PLACEMENT METRICS



## MAJOR MBPs

RANKING	MBP	MKT SHARE
1st	GOOGLE	52.3%
2nd	YAHOO	20.1%
3rd	MICROSOFT	11.1%

COUNTRY	INBOX PLACEMENT METRICS			MAJOR MBPs		
	INBOX	SPAM	MISSING	1st	2nd	3rd
UNITED STATES	86.8%	6.9%	6.3%	Gmail - 53.7%	Yahoo - 20.9%	Microsoft - 10.5%
CANADA	89.4%	3.8%	6.8%	Gmail - 36.2%	Microsoft - 22.3%	Yahoo - 8.6%

# OCEANIA

Oceania is dominated by Australia, which represents the vast majority of this region’s email marketing activity. In 2025, the region saw an average inbox placement of 87.9 percent, a three percent year-over-year uplift. While Oceania’s mailbox profile is dominated by MAGY (86 percent coverage), it is also notable for having the biggest Microsoft coverage in this report (28.7 percent coverage). BigPond is the largest regional provider with 5.8 percent coverage.

## Country spotlight: Australia

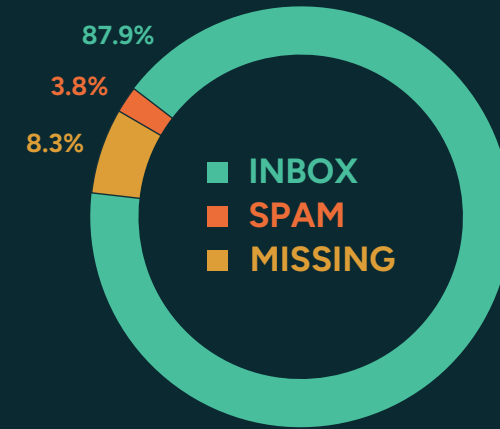
Australia reformed its [Privacy Act](#) in 2025, introducing stricter privacy protections and obligations for organizations handling personal data. New guidance emphasizes that consumer consent for sharing personal information must be specific, informed, and unambiguous. Brands must also disclose their use of automated decision-making (e.g., AI systems) in their privacy policies. The Australian regulator has also ramped up enforcement of the [Spam Act](#) with significant penalties for non-compliant email marketing. These factors have all heightened trust between consumers and marketers, contributing to this region’s improvement.

*“With Australia’s shift toward consent, we’ve seen a measurable increase in consumer trust. Combining this with the mandatory transparency around AI-driven automation and strict Spam Act enforcement, the result is a cleaner ecosystem. Marketers are no longer just sending mail; they are managing high-integrity relationships, which is the primary driver behind the region’s significant gains in deliverability and engagement.”*



**Laura Christensen, Sr. Director Professional Services & Customer Success, Validity**

## INBOX PLACEMENT METRICS



## MAJOR MBPs

RANKING	MBP	MKT SHARE
1st	GOOGLE	45.9%
2nd	MICROSOFT	28.7%
3rd	YAHOO	7.9%

COUNTRY	INBOX PLACEMENT METRICS			MAJOR MBPs		
	INBOX	SPAM	MISSING	1st	2nd	3rd
AUSTRALIA	87.8%	3.9%	8.3%	Gmail - 46.5%	Microsoft - 29.2%	Yahoo - 7.8%



# SOUTH AMERICA

South America was a star performer in 2025 with 10.6 percent year-over-year increase in inbox placement rate. The economic profile of this region is heavily dominated by Brazil, and over 90 percent of MBP coverage is shared between the MAGY providers (Gmail leads with 56.5 percent). Local mailbox providers like Terra and BOL now represent less than one percent each.

## Country spotlight: Brazil

Similar to Europe, Brazilian email marketing benefits from an [LGPD](#) "halo effect," but there are other factors at play. Economic volatility has seen brands double down on email's proven effectiveness, stiff competition with social media like WhatsApp forced email to up its game, and practitioners have become more experienced, with a clear shift away from the "batch and blast" tactics once popular in this region.

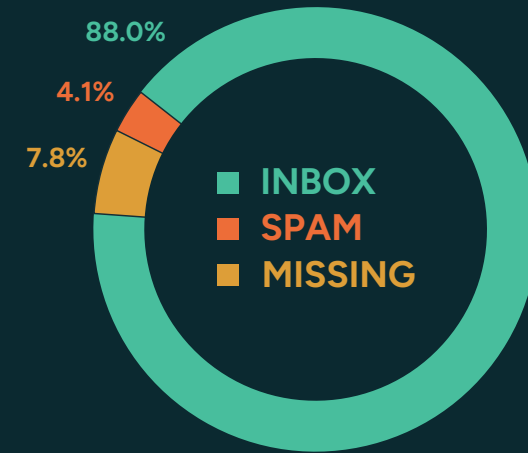
*"As the leading mailbox provider in the region, Gmail's bulk sender requirements forced Brazilian marketers to up their game. These rules pushed companies to improve list hygiene, strengthen authentication, refine segmentation, and move away from spammy tactics to reduce user-reported spam rates.*

*Even so, there is still room for improvement among our "Tupiniquim" marketers. Email remains a focus in Brazil, especially for brands that commit to best practices, protect their sender reputation, and focus on long-term engagement rather than short-term volume."*



**Rafael Viana, Senior Email Strategist, Validity**

## INBOX PLACEMENT METRICS



## MAJOR MBPs

RANKING	MBP	MKT SHARE
1st	GMAIL	56.5%
2nd	MICROSOFT	21.5%
3rd	YAHOO	9.6%

COUNTRY	INBOX PLACEMENT METRICS			MAJOR MBPs		
	INBOX	SPAM	MISSING	1st	2nd	3rd
BRAZIL	89.0%	4.6%	6.5%	Gmail - 59.7%	Microsoft - 21.7%	Yahoo - 6.2%



# B2B SENDERS

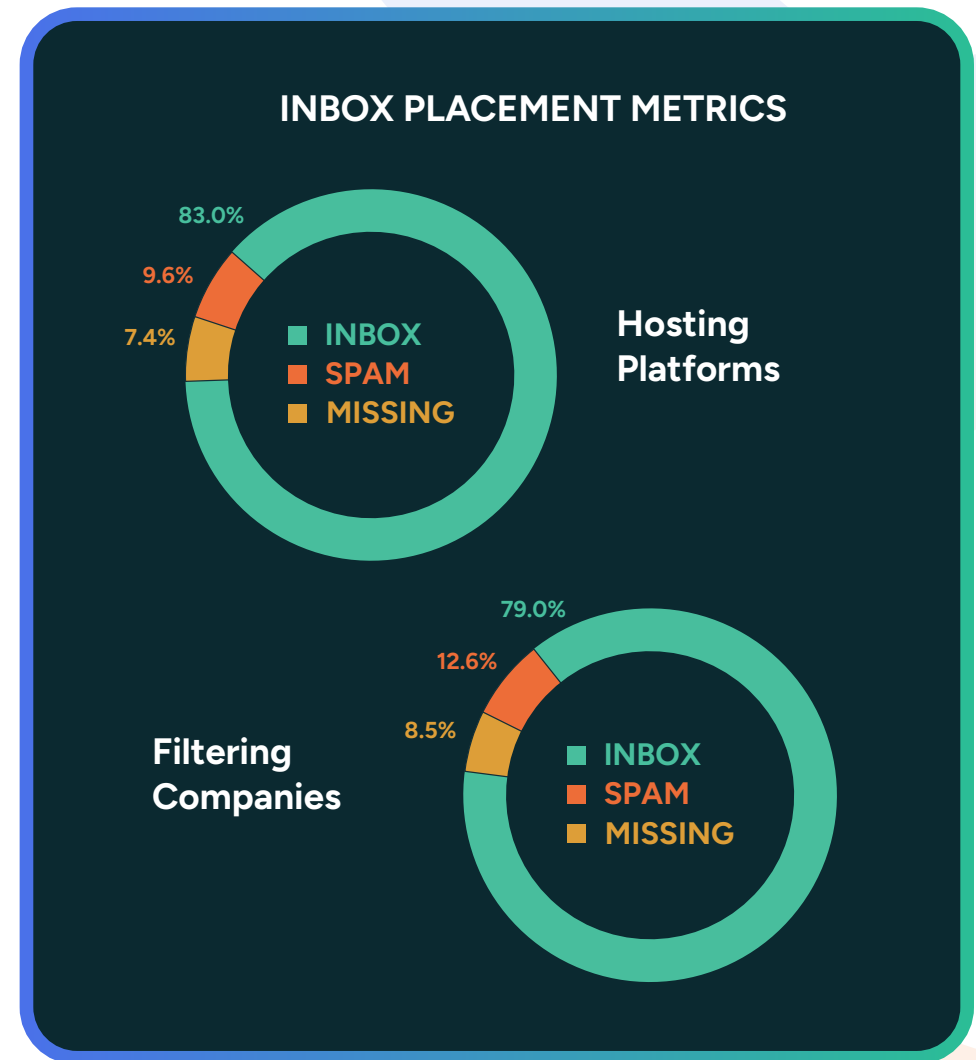
## What happened in 2025?

Deliverability got harder for [B2B senders](#) in 2025—and average inbox placement rates at hosting platforms declined by 1.3 percent. Matters were even worse at filtering companies, where average inbox placement rates dipped by 5.8 percent. Remember, the true picture is potentially more negative because most businesses use a hosting platform and a corporate spam filter, leaving B2B senders to face a “double whammy” deliverability challenge.

Office 365 and Google Apps dominate the hosting platform landscape, with over 95 percent of market share between them. This makes senders’ jobs a little easier. Behind the scenes, the filtering technology these platforms use is broadly similar to their B2C counterparts, and the same rules for deliverability apply.

[Proofpoint](#) dominates the corporate filtering landscape, with slightly over 50 percent market share. This is even greater at larger enterprises—they frequently report 75 percent to 85 percent of the Fortune 100 use Proofpoint.

Admins add additional complexity when navigating corporate filters, as they can set unique controls that define approved senders and domains, blocked senders, inbound gateway rules, spoofing protection (e.g., enhanced DMARC policies),



## B2B SENDERS

and custom spam thresholds. Admins can also define compliance settings that route spam or suspicious messages to users' spam folders, a quarantine "holding pen," or directly to admins themselves for review.

A major challenge for B2B senders is the increased importance of authentication. Because their emails often pass through a filter, authentication breaks when they are forwarded from an IP address that is not the same as their original IP.

To counter this, all senders should implement Authenticated Received Chain (ARC), an email authentication protocol (RFC 8617) that allows intermediate servers to sign an email's original [SPF](#), [DKIM](#), and [DMARC](#) results, preserving their authentication even if the intermediate servers modify the message.

### MAJOR HOSTING PLATFORMS

RANKING	VENDOR	MKT SHARE
1st	OFFICE 365	60.3%
2nd	GOOGLE APPS	35.9%
3rd	RACKSPACE	0.9%

### MAJOR FILTERING COMPANIES

RANKING	VENDOR	MKT SHARE
1st	PROOFPOINT	50.5%
2nd	MIMECAST	20.7%
3rd	CISCO	11.8%

# DELIVERABILITY BY INDUSTRY SECTOR

## High performers

With an average inbox placement rate of 97.2 percent, Transportation was the top-performing sector in 2025, followed by Energy, Utilities, & Waste and Telecommunications.

The Finance and Insurance sector also deserves a callout. Not long ago, this industry was a low performer, as it's particularly vulnerable to consumer concerns about fraudulent messages. This sector benefits more than most from the increased focus on authentication—customers now have greater confidence that the messages they receive from these senders in this sector are legitimate and trustworthy.

## Finance brand highlight: Grupo Recovery

Brazilian debt collection management organization Grupo Recovery faced significant challenges in the finance sector, operating in a region where email deliverability was particularly difficult. They struggled with a 20 percent inbox placement rate at Microsoft and were completely blocked by Gmail.

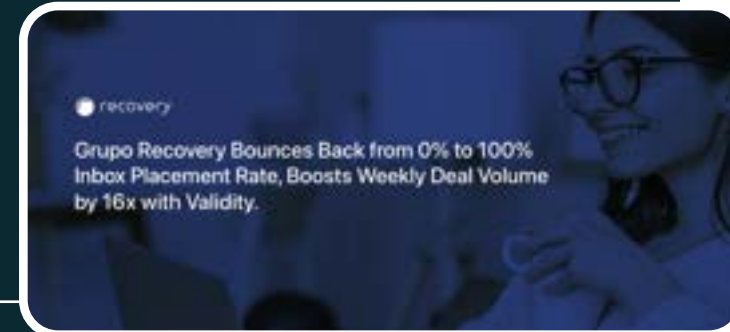
Sector	Inbox	Spam	Missing
Transportation	97.2%	1.1%	1.8%
Energy, Utilities, & Waste	95.0%	1.8%	3.1%
Telecommunications	92.6%	4.7%	2.7%
Government	91.4%	5.4%	3.2%
Travel & Hospitality	90.8%	4.1%	5.1%
Insurance	90.4%	3.6%	6.1%
Retail	90.4%	2.7%	6.9%
Holding Companies & Conglomerates	90.2%	3.3%	6.6%
Manufacturing	89.9%	5.7%	4.4%
Finance	88.8%	6.5%	4.6%
Hospitals & Physicians Clinics	88.4%	8.2%	3.4%
Media & Internet	88.1%	4.3%	7.7%
Organizations	87.7%	4.5%	7.8%
Education	87.6%	7.9%	4.5%
Construction	86.5%	10.6%	2.9%
Software	85.7%	7.7%	6.6%
Business Services	85.1%	7.7%	7.2%
Law Firms & Legal Services	82.1%	8.0%	9.9%
Consumer Services	81.2%	10.9%	7.9%
Healthcare Services	80.3%	10.7%	9.0%
Real Estate	80.1%	15.9%	4.1%



## DELIVERABILITY BY INDUSTRY SECTOR

Despite these obstacles, Grupo Recovery refused to back down. They partnered with Validity to tackle their email list hygiene, authentication issues, and sender reputation. Through their hard work and persistence, they achieved 100 percent inbox placement and increased closed business by 16x per week.

[Read the full customer story here](#)



### Low performers

Real Estate occupies the bottom of the table, along with Healthcare Services and Consumer Services.

Real Estate has struggled for several years with economic pressures dampening appetite for property transactions. Gmail spam rates sit at 20.7 percent while Microsoft missing rates are 22.4 percent. The increased mailbox provider focus on engagement means programs with long periods between transactions will find it harder to generate the positive signals that ensure high inbox placement rates.

Transportation and Business Services have also been big climbers since our previous report (both up 8.4 percent) closely followed by Energy, Utilities, & Waste (+8.2 percent). Construction (-6.9 percent) fell furthest, followed by Law Firms & Legal Services (-5.2 percent), and Government (-4.9 percent).

## DELIVERABILITY BY INDUSTRY SECTOR

### Manufacturing brand highlight: Copeland

As challenges in the manufacturing industry grow, Copeland recognized that managing two ESPs simultaneously would complicate their email deliverability efforts.

By partnering with Validity, Copeland transformed their ESP migration process from a complex undertaking into a quick and seamless experience. Validity helped validate contacts, identify duplicate records, and optimize the email-building process, ensuring users could transition smoothly without the need to learn a new tool before or after the migration.

[Check out the full story here](#)

#### COPELAND

Copeland easily switches ESPs using Validity tools.

### Travel and hospitality brand highlight: Viajar Barato

The travel and hospitality industries typically demonstrate strong deliverability, but competition for inbox attention remains fierce.

With Validity's support, Viajar Barato has consistently achieved an impressive 99-100 percent inbox placement rate for 10 years running. This success is attributed to their regular list validation, audience segmentation, and additional deliverability advantages, such as "trusted sender" status with MBPs.

[Read the full story here](#)

ViajarBarato

Viajar Barato Achieves a Decade of 100% Inbox Placement with Validity Sender Certification.



# MEASURING EMAIL PERFORMANCE IN 2026: NON-TRADITIONAL METRICS

As senders grapple with the new challenge of how to quantify engagement in the same way MBPs do, new metrics will be needed to gauge success.

Here are three emerging email KPIs Validity predicts will go mainstream in 2026:

## Disaffection index

This one isn't entirely new—it's more about making better use of established data points that may have been under-considered until now.

The "Disaffection Rate" combines all the factors that mean an email program is losing subscribers into a single metric.

Here's the formula:

$$\text{Disaffection Rate} = \frac{\text{Unsubscribes} + \text{Complaints} + \text{Bounces}}{\text{Clicks}} \times 100$$

## NON-TRADITIONAL EMAIL METRICS

Senders may be comfortable with a 0.3 percent opt-out rate, and 0.1 percent for complaints and hard bounces, but let's apply them to our equation:

For an email program sending an average of two messages per week, half of its hard-won email list will churn in less than a year. Plug in an average click-through

rate of one percent and we get a disaffection rate of 50 percent. This means that for every two positive clicks the program generates, one subscriber is lost. Then, consider the additional cost per acquisition to replace them and the future subscriber lifetime value lost. It's a classic illustration of how it's far cheaper to retain existing customers than to acquire new ones.

$$\frac{0.3\% + 0.1\% + 0.1\%}{1.0\%} = 50\%$$

When a program's disaffection rate is larger than its click rate, it means every email sent is eroding the list instead of energizing it. Even worse, the resulting spam complaints and bounces negatively impact sending reputation, affecting the performance of all campaigns. A score this high will indicate a crisis situation that requires immediate and major remediation.

## NON-TRADITIONAL EMAIL METRICS

### Reply rate

Successful senders view email marketing as a two-way channel, where subscribers can engage with brands and vice versa. MBPs are on the same page. When Microsoft launched their new requirements in April 2025, their [guidance](#) specifically told senders to “ensure the ‘From’ or ‘Reply-To’ address is valid, reflects the true sending domain, and can receive replies.” This shows replies are almost certainly one of the metrics MBPs use to measure subscriber engagement—and we predict that “Reply Rate” will become a primary KPI in 2026.

**The equation is simple:**

$$\text{Reply Rate} = \frac{\text{Replies}}{\text{Delivered Emails}} \times 100$$

Let's plug in some sample values:

$$\frac{95}{10,000 - 500} = 1\%$$



## NON-TRADITIONAL EMAIL METRICS

Say an email program sends a newsletter to 10,000 subscribers, and 9,500 are successfully delivered. Then, 95 people hit reply and write back. The reply rate is one percent.

Remember, these subscribers cared enough to respond. That response is a strong engagement signal—and a sign of the trust.

The growing importance of this metric means senders should design emails specifically to encourage replies. Emails that don't invite a response can feel incomplete to recipients, leading to lower engagement—and mailbox providers penalize that lack of interaction.

Using "reply@" addresses will become the norm, and senders will also start deploying AI agents to handle these responses, enhancing this new customer experience.

Emails will also introduce messaging to encourage these interactions. Clothing company Draper James' emails include the following on their footers: "Send questions, comments, love notes to us at [customer@draperjames.com](mailto:customer@draperjames.com) (we'll write you back, we promise!)." This will quickly become the standard all email programs must aspire to.

### **Quantifying trust**

Trust in marketing is often discussed but rarely measured. We use the following [calculation](#) to understand how to quantify trust, levers marketers can pull to build it.

## NON-TRADITIONAL EMAIL METRICS

Here's how it works:

$$\text{Trustworthiness} = \frac{\text{Credibility} + \text{Reliability} + \text{Intimacy}}{\text{Self-Orientation}}$$

- **Credibility** measures your level of believability and refers to your competence and credentials.
- **Reliability** is the consistency of your actions. Do senders follow through on their commitments and promises over time?
- **Intimacy** is the feeling of safety and security others feel when they entrust their personal or sensitive information to the sender.
- **Self-orientation** measures how much a sender appears focused on their own interests versus the needs of their audience.

Of course, variables like these are highly subjective—so how can they be quantified?

It's best to start small. Ask customers for feedback, encourage replies, actively promote preference centers, and remember trust metrics can be negative, so monitor complaint rates too.

Ultimately, senders should step back and look at their email programs from the customer's point of view. Do your emails feel trustworthy? If not, be ready to make changes.

### GUIDE TO EMAIL MARKETING METRICS

*How to Measure Effectiveness and  
Troubleshoot Problems in Your Email Program*

validity

Email measurement has changed—a lot! Check out this quick guide to help you zero in on the metrics that are most important for your program.

[Read now](#)

# 12 TIPS FOR INCREASING DELIVERABILITY IN 2026

In an industry where change is the only constant, being proactive is the best way to future-proof your email marketing performance. Based on the findings of this report, here are 12 tips you can use to improve your deliverability and stay ahead in 2026.

1

## Track your inbox placement

Knowing where your emails land can give you a competitive edge over those still relying solely on delivery rate metrics. Monitoring inbox placement helps you catch issues early and ensure your emails get seen by more people.

Track your **Sender Score** for numerical representation of your sender reputation—like a credit score for email. Scores above 85 indicate a strong reputation and better deliverability, while scores below 80 suggest issues. Regularly monitor your Sender Score and take steps to improve your practices if your score dips into the danger zone.

2

## Maintain and protect list hygiene

A marketer's email list is one of their most valuable assets—but data decay can be a silent killer. People change jobs or email addresses, inactive accounts can hurt your reputation, and sign-up errors or fake submissions can lower list quality. Regularly verify contacts and add validation at sign-up to keep your lists clean.

3

## Prioritize QA testing

Customer experience is the cornerstone of successful email marketing. Emails with slow load times, formatting issues across devices, or broken links can lead to complaints or spam folder placement. Thoroughly **test** all aspects of every email—content, design, links, and rendering—before sending to ensure the best experience.



## 12 TIPS FOR INCREASING DELIVERABILITY IN 2026

4

### Make data-driven campaign decisions based on post-send analytics

The email marketer's job doesn't end after pressing "send." Post-send analytics can reveal valuable insights for optimizing future campaigns. Join feedback loops like Google Postmaster Tools, Yahoo Sender Hub, and Microsoft SNDS to understand how your emails perform. Use this data to learn what your audience likes and where to improve.

5

### Become "machine-readable"

As AI summary tools in inboxes become more common, make sure your emails are machine-readable. The last thing you want is for **AI** to incorrectly summarize your email and confuse your audience. Make your emails more readable to AI by adopting strategies inspired by SEO, like semantic formatting, front-loading key information, and using inbox schemas like Gmail annotations.

6

### Balance AI efficiency with humanity

In 2026, the email marketer's role will evolve to include AI support for tasks like coding, subject line optimization, and content generation. While AI can boost efficiency, it's essential to maintain the human nuance that resonates with subscribers. Many audiences can identify **AI-generated content** and may be less inclined to engage with it. Implement quality control measures to ensure your campaigns strike the right balance between automation and authenticity.

## 12 TIPS FOR INCREASING DELIVERABILITY IN 2026

7

### **Lead with privacy and AI transparency**

AI will continue to advance rapidly in 2026, but audience skepticism around data privacy will remain. Some users are even seeking ways to disable AI inbox features altogether. Make transparency a cornerstone of your email strategy by promoting your preference center, sharing what data you collect and why, and staying on top of evolving data privacy laws. When in doubt, prioritize privacy—if it's not a legal requirement now, it likely will be soon.

8

### **Focus on relevance rather than send time**

In 2026, send time optimization (STO) will become increasingly outdated. AI-driven inboxes prioritize relevance over timing, often organizing emails based on user engagement rather than chronological order. For example, Gmail's promotions tab ranks emails according to the brands users interact with most. Focus on boosting meaningful engagement metrics rather than STO strategies.

9

### **Go beyond MBP bulk sender requirements**

In 2025, Microsoft joined Gmail and Yahoo in introducing bulk sender requirements. To achieve strong deliverability across mailbox providers, familiarize yourself with the nuances of each platform's regulations. Go beyond the minimum standards. For example, Yahoo and Gmail recommend keeping spam complaint rates below 0.3 percent but aim for 0.1 percent or lower to maximize deliverability results.



## 12 TIPS FOR INCREASING DELIVERABILITY IN 2026

10

### Tighten authentication measures

Authentication protocols are no longer a “nice-to-have”—they’re mandatory for mailbox providers to recognize you as a legitimate sender. Ensure that your SPF, DKIM, and DMARC records are properly configured. Authentication requirements are likely to evolve further in 2026, so take a proactive approach. For best results, confirm that your SPF and DKIM records pass validation, and set your DMARC record to at least p=quarantine, (but ideally p=reject for stricter security).

Authentication can be complex, so consider working with email experts to avoid missteps and ensure your protocols meet the latest standards.

11

### Move beyond opens and clicks

Since Apple’s Mail Privacy Protection, opens have become unreliable—and with the rise of **bot clicks**, clicks are suffering from the same fate. While these metrics still have value, they shouldn’t be the centerpiece of your strategy. Instead, focus on **meaningful engagement metrics** like conversions, site visits, and replies. True engagement builds trust, strengthens your sender reputation, and improves deliverability over time.

12

### Ditch your No-Reply

To build deeper connections and boost engagement, retire the outdated “No-Reply” address. Opening the lines of communication allows subscribers to respond directly to your emails, creating opportunities to build brand trust and improve sender reputation organically. Encourage replies and watch as meaningful interactions boost your bottom line.



# CONCLUSION

In today's email landscape, even senders who follow every best practice can't guarantee that every message will land in the inbox.

That's why Validity is here. Whether you're looking to improve deliverability, optimize campaigns, or build stronger connections with your audience, our suite of solutions and team of experts are ready to support you.

## Here's how our solutions can help:

- **DemandTools:** Clean and maintain your CRM data to power more accurate, personalized campaigns.
- **BriteVerify:** Easily validate email addresses with ease to boost sender reputation and engagement.
- **Litmus:** Build, test, and monitor flawless email campaigns—with new deliverability features to help senders reach more inboxes.
- **Validity Engage:** Streamline the email marketing process with an AI-powered platform designed to unlock more email ROI.

## Ready to take your campaigns to the next level?

[Schedule a demo](#) with our email experts to learn how Validity can help you achieve record-breaking performance.

## Methodology:

To obtain the data used in this benchmark report, we use seed data to track and measure how email is delivered. Validity's customers use these email addresses to test their campaigns at hundreds of MBPs and spam filters around the world. Each time they do so, our software checks to see if they were delivered, and whether they were placed in the receiving inboxes or spam folders. This data is aggregated into our Mailbox Provider Community reporting suite, providing the world's most comprehensive view of email inbox placement rates. Note that senders who have not approved for their data to be aggregated for this purpose are excluded from this report. This data also represents a snapshot in time, and regular Validity users may see different numbers when they view reporting.





## **ABOUT VALIDITY**

For over 25 years, leading brands worldwide have trusted Validity to achieve end-to-end marketing success—using trustworthy data as a key advantage. Our AI-powered platform—led by flagship products DemandTools, Litmus, and BriteVerify—helps teams drive stronger engagement, work smarter, cut costs, and grow faster. Learn more at [Validity.com](https://Validity.com) and connect with us on LinkedIn.

