



GLOBAL DELIVERABILITY BENCHMARK 2019



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Introduction

Over the last year, we've seen an ongoing evolution within the email industry, including large acquisitions of email service providers (ESPs) like Epsilon and analytics companies like Tableau, the emergence of new email providers (Acoustic, formerly known as Watson Marketing Cloud, and Silverpop), the completion of major mailbox provider (MBP) migrations at Verizon Media and Microsoft, and the ongoing growth of the email standards DMARC and BIMI.

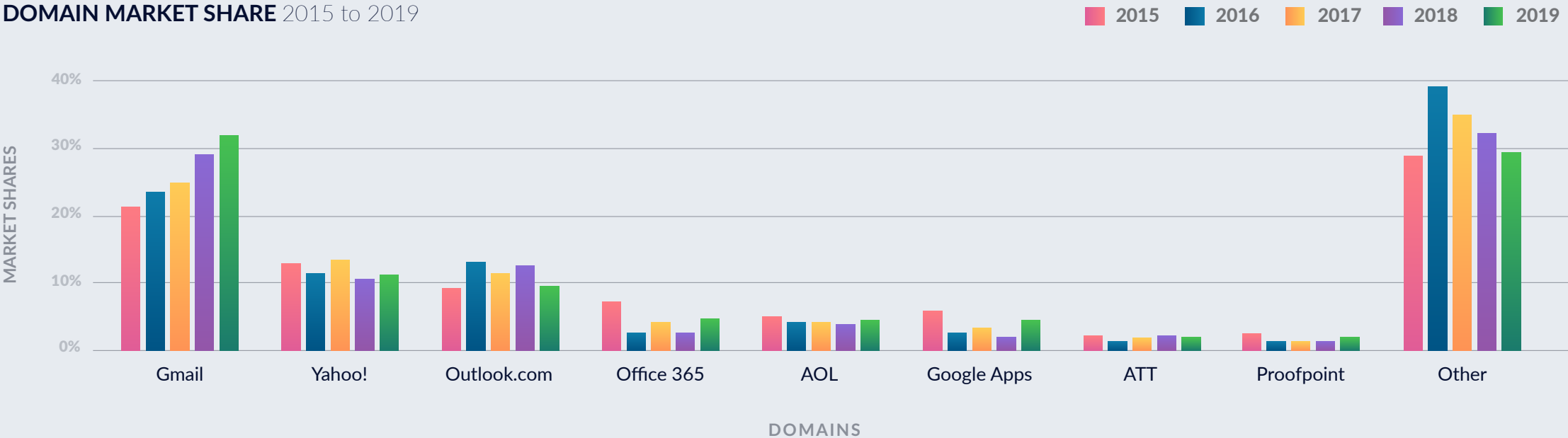
We're eager to benchmark global inbox placement rates (IPR) between 2016 and the second quarter of 2019, to identify how inboxing has fluctuated over the years, and to dig in to potential causes of any meaningful change.

Domain Market Share

Based on 250ok seedlist optimizer results, we see the ongoing emergence of Gmail's dominance in the marketplace, growing from 21% of the average marketing email list to a very dominant 31% in 2019, more than every other MBP outside of the top eight. Yahoo has been battling Outlook.com for

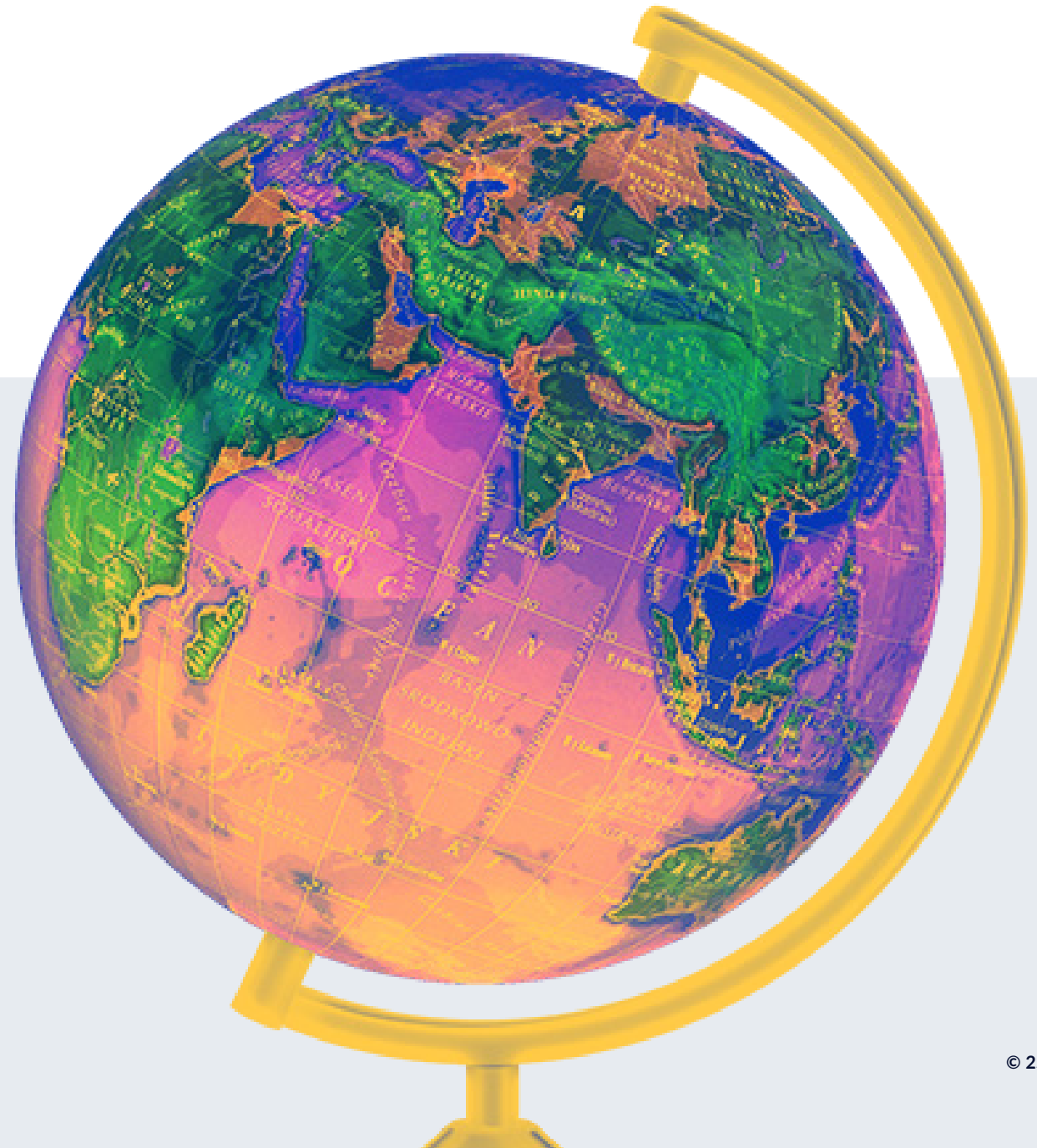
second place for the last five years. Office 365, Google Apps, and AOL are currently in a three-way tie for fourth place with an equal market share of 4%, followed by AT&T and Proofpoint at 2% market share.

DOMAIN MARKET SHARE 2015 to 2019



Deliverability

Global
Big 4
United Kingdom
North America

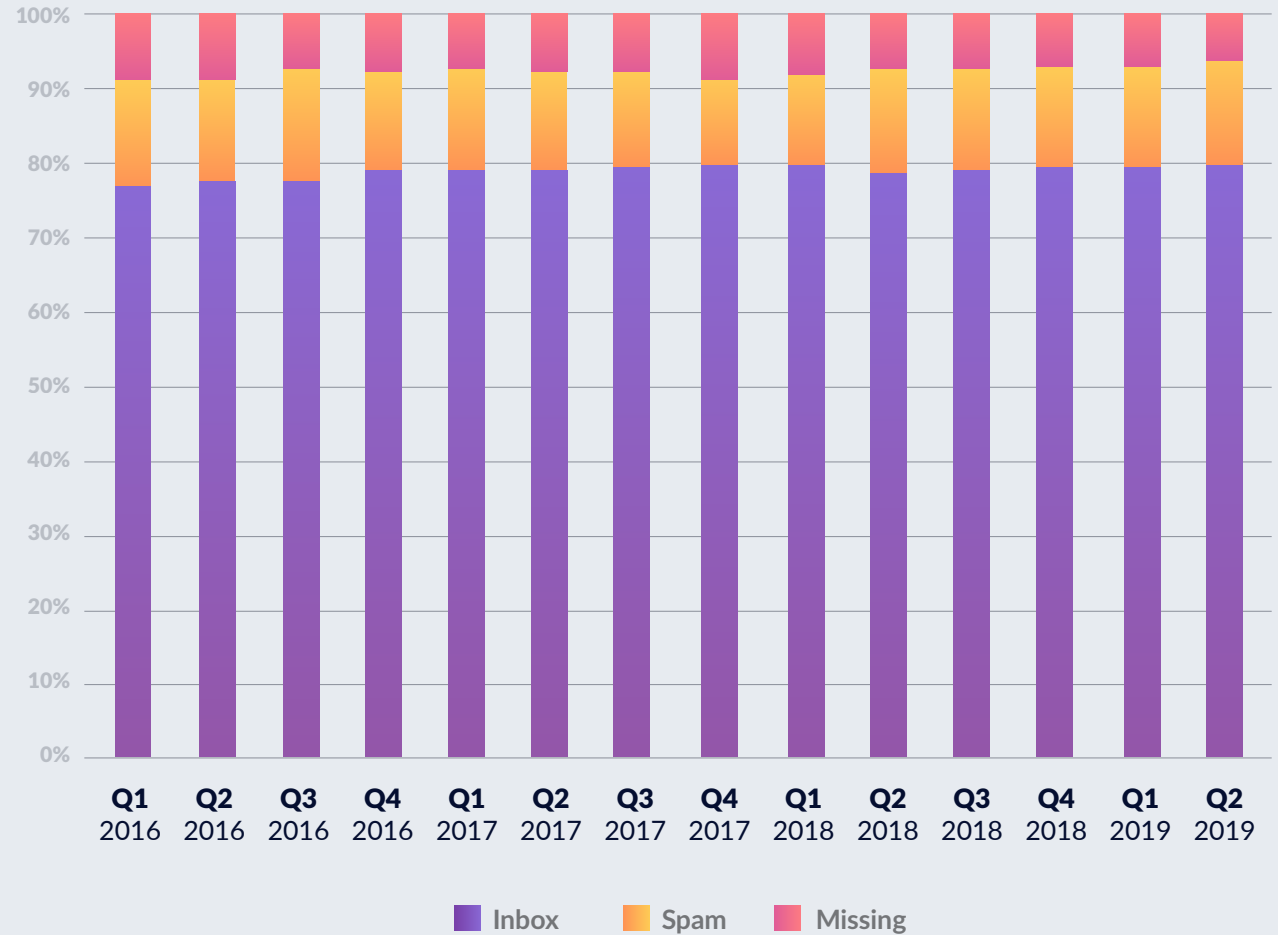


Global

The email landscape is constantly changing, and reputation systems continue to evolve everywhere, yet the global average inbox placement rate remains steady at 80%. Inbox placement rates rose for the third year in a row when comparing the second quarter of the year from 77.9% in 2016 to 79.8% in 2017, yet declined slightly to 78.4% in 2018 and rose again to 80.6% in 2019.

This upward trend shows a slow maturity of commercial emails requiring a consent-based practice demanded by mandates like Canada’s Anti-Spam Legislation (CASL) and European Union’s General Data Protection Legislation (GDPR). Also, we continue to see the evolution of email software building in automation and artificial intelligence to help with traffic shaping, encryption, authentication, and the centralization of large email service providers (ESPs) with marketing automation platforms building interfaces for their sending infrastructure.

GLOBAL QUARTERLY IPR SINCE 2016



Big 4

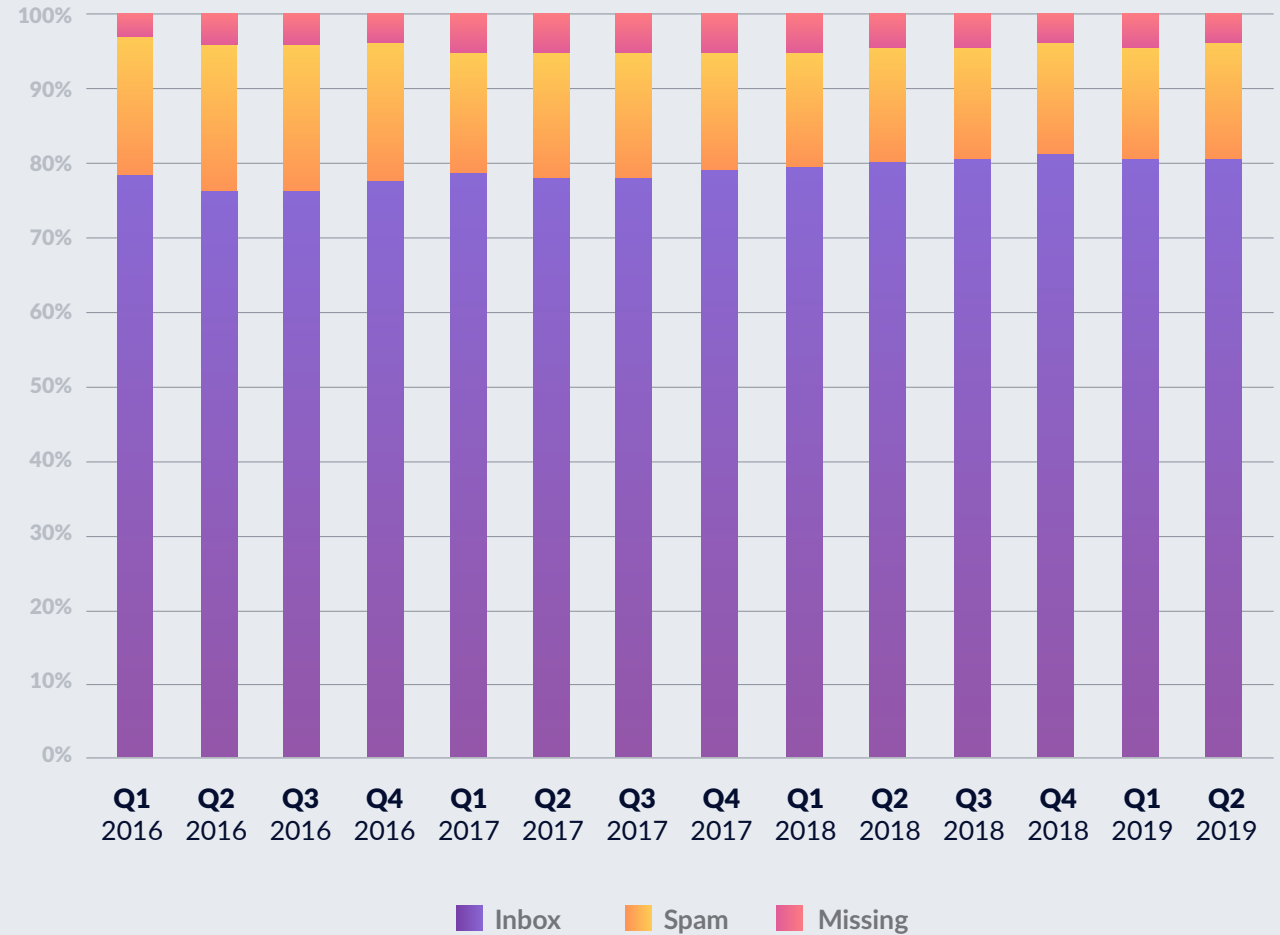
EMAIL, AOL, OUTLOOK.COM, APPLE

We've witnessed a lot of turmoil with the Big 4 in the last two years, with infrastructure mergers of Outlook.com and Office 365 (Hotmail), and of Yahoo, AOL, and Verizon Media. Even so, the delivery rates of these providers maintain consistent, and grow more accurate in separating wanted and unwanted messages within consumers' inboxes.

In 2019, Gmail introduced TensorFlow, a new machine learning-powered spam filter identifying 100 million more unwanted messages per day, and successfully diverting them from users' inboxes. While this is a significant change, we did not observe a meaningful downturn in delivery metrics for most senders using best practices.

This is the fourth year of inbox placement growth overall, with messages being delivered to the inbox at a constant 80% for the last four quarters, up from 74.3% in Q2 2016 to 80.4% in Q2 2019.

BIG 4 QUARTERLY IPR SINCE 2016



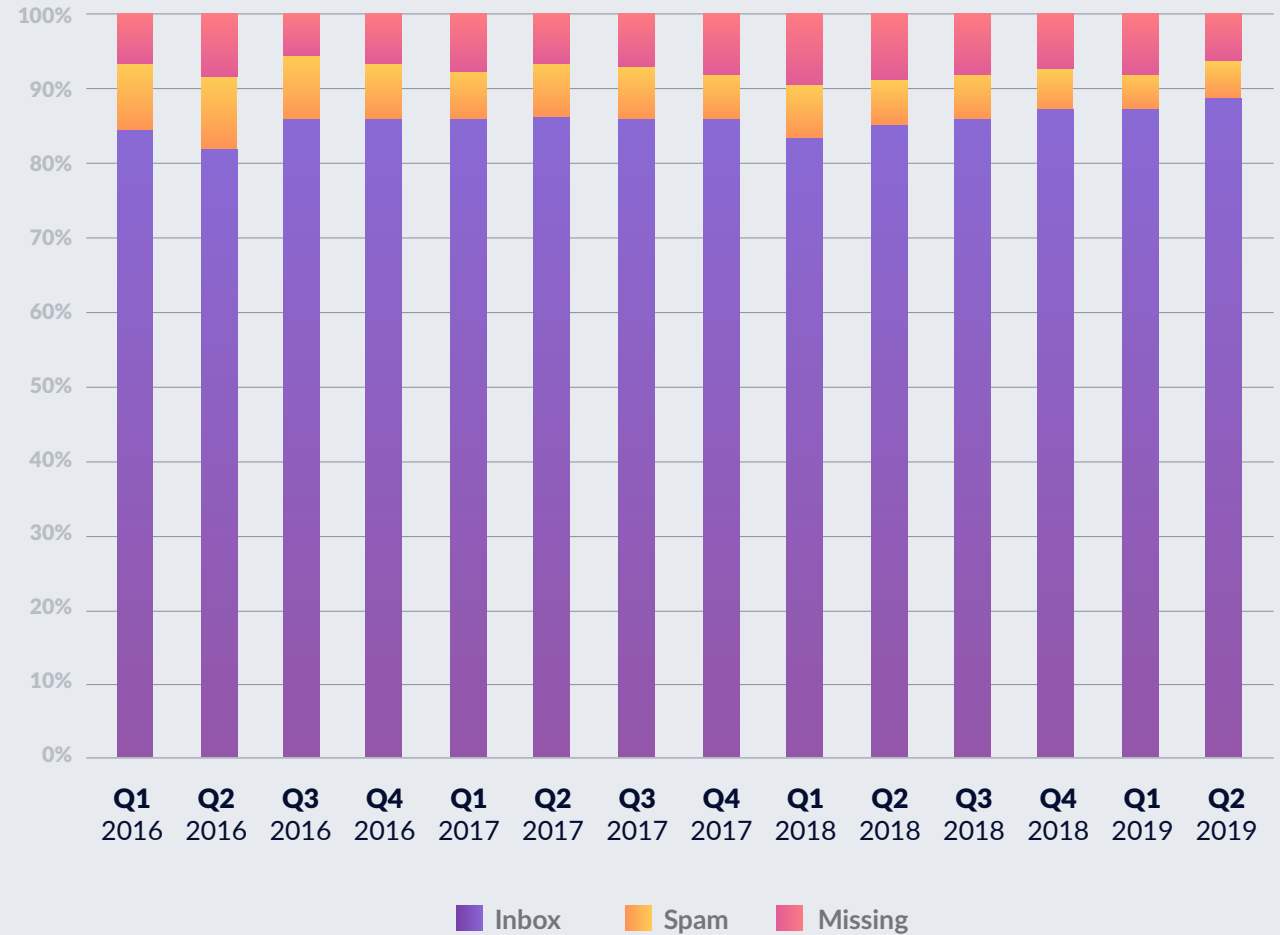
North America

CANADA, USA, MEXICO (EXCLUDING BIG 4 MBPs)

Once known as the “Wild West of Email,” where anything goes when sending commercial emails to consumers (even without consent), times have changed and the North American email space is settled and tamed. Marketers are spending more time on optimization, targeting, building cleaner lists, and focusing on building stronger relationships with consumers.

The four-year trend shows delivery improvements almost every quarter. The prevailing trend is inbox placement rates at North American ISPs rising from 80.8% in Q2 2016 to 88.9% in Q2 2019.

NORTH AMERICA QUARTERLY IPR SINCE 2016

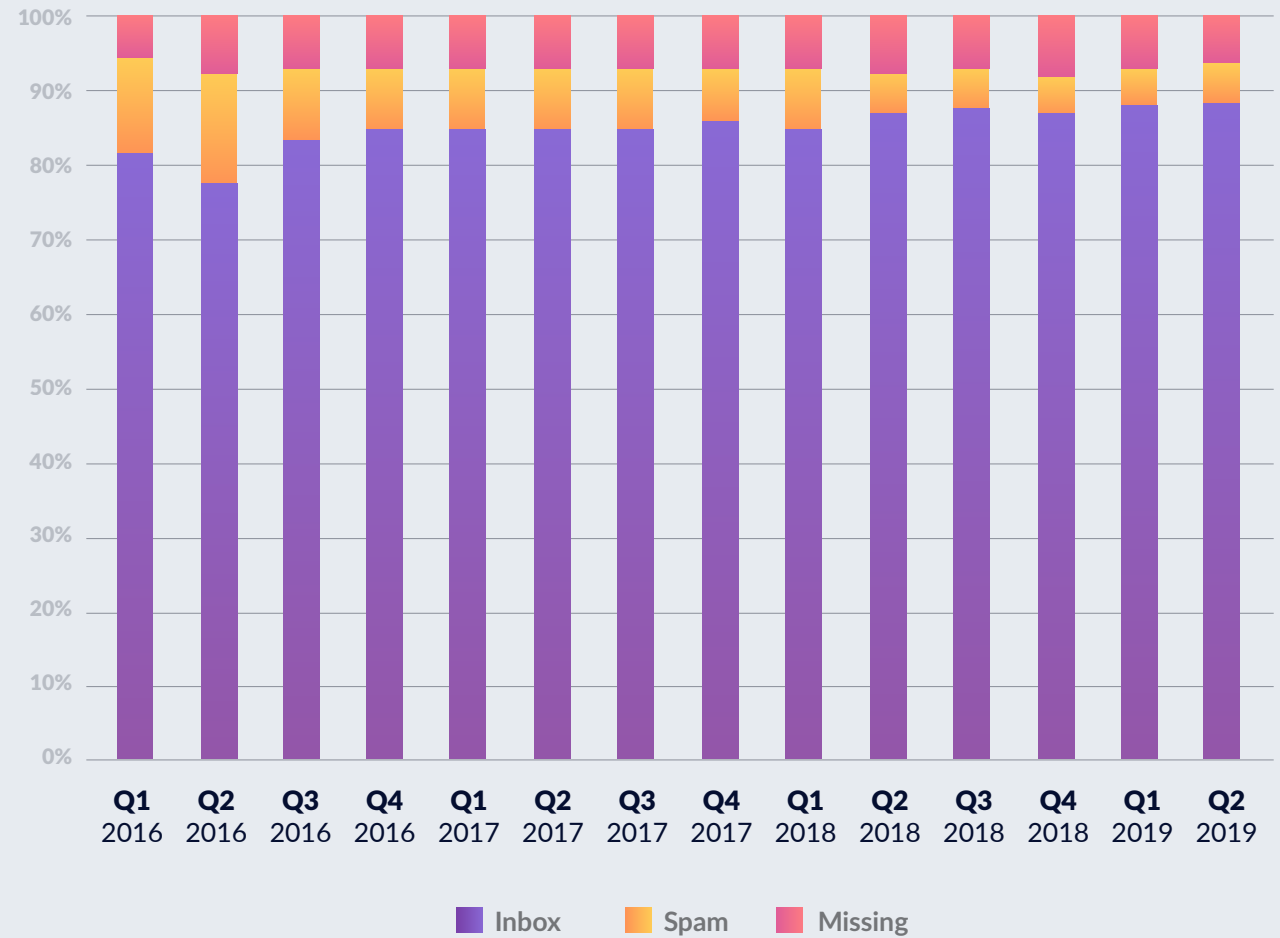


NORTH AMERICA

USA

Following the trend across North America, inbox placement rates in America saw a general improvement over the last four-year period, ending the second quarter of 2019 with a respectable 88.3% IPR, up significantly over the last three quarters.

USA QUARTERLY IPR SINCE 2016



NORTH AMERICA

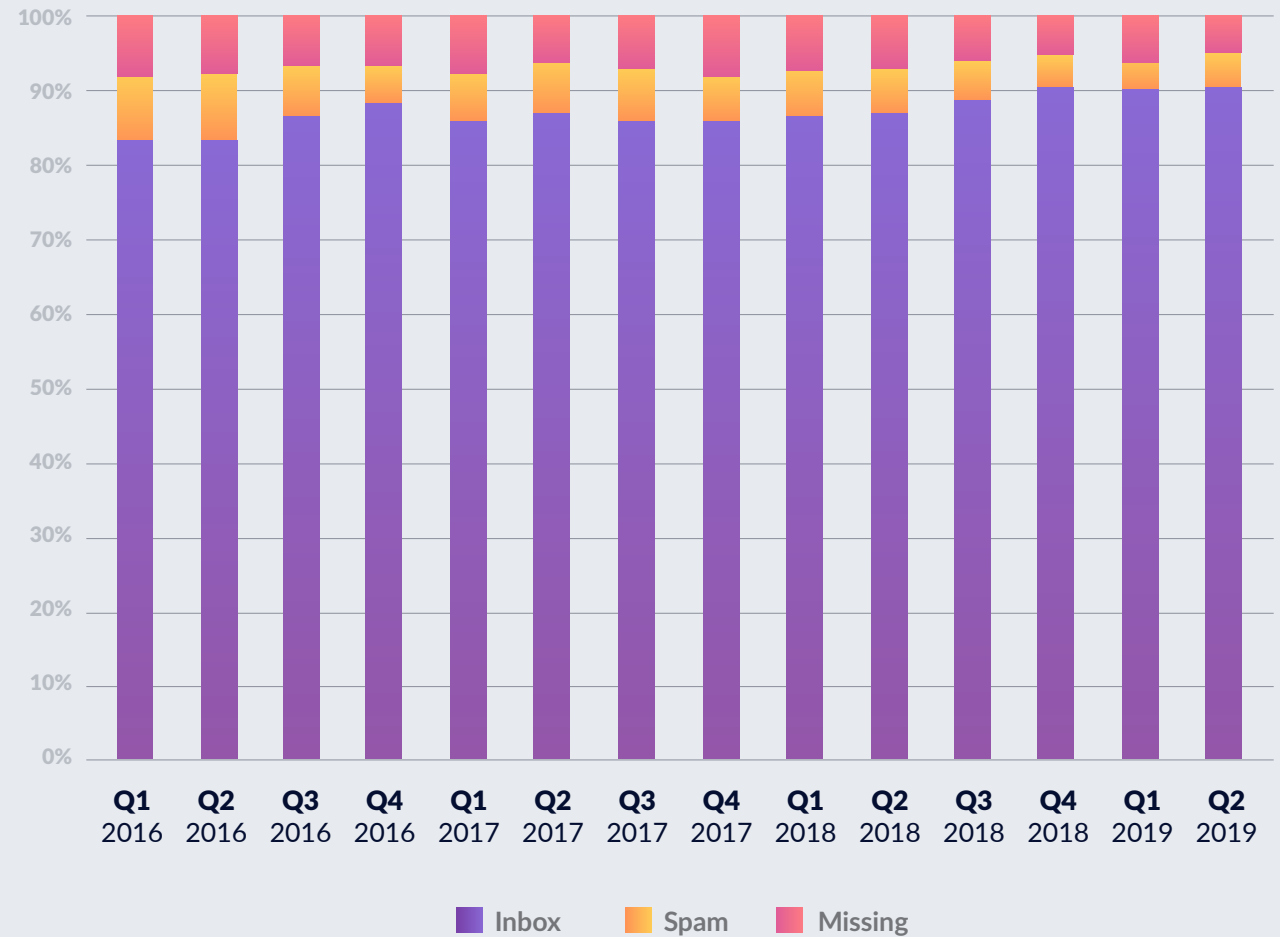
Canada

Canadian ISPs lead the way in getting mail to consumer inboxes, filtering less mail into users' spam folders. Ever since Canada's anti-spam legislation (CASL) came into force in 2014, marketers are diligent about their collection of recipients' consent. Remember CASL has two types of valid consent for sending commercial emails to consumers:

1. Implied consent resulting from an existing business relationship (sale, purchase of goods or services), or an existing non-business relationship (donation or volunteering).
2. Express consent collected from the individual in which the conditions of the legislation Sec 10 (1) are properly met.

Inbox placement rates for Canadian recipients reached an all-time high in the second quarter of 2019, peaking at 90.4% when compared year-over-year at 86.5% in Q2 2018, 87.4% in Q2 2017, and 85.2% in 2016.

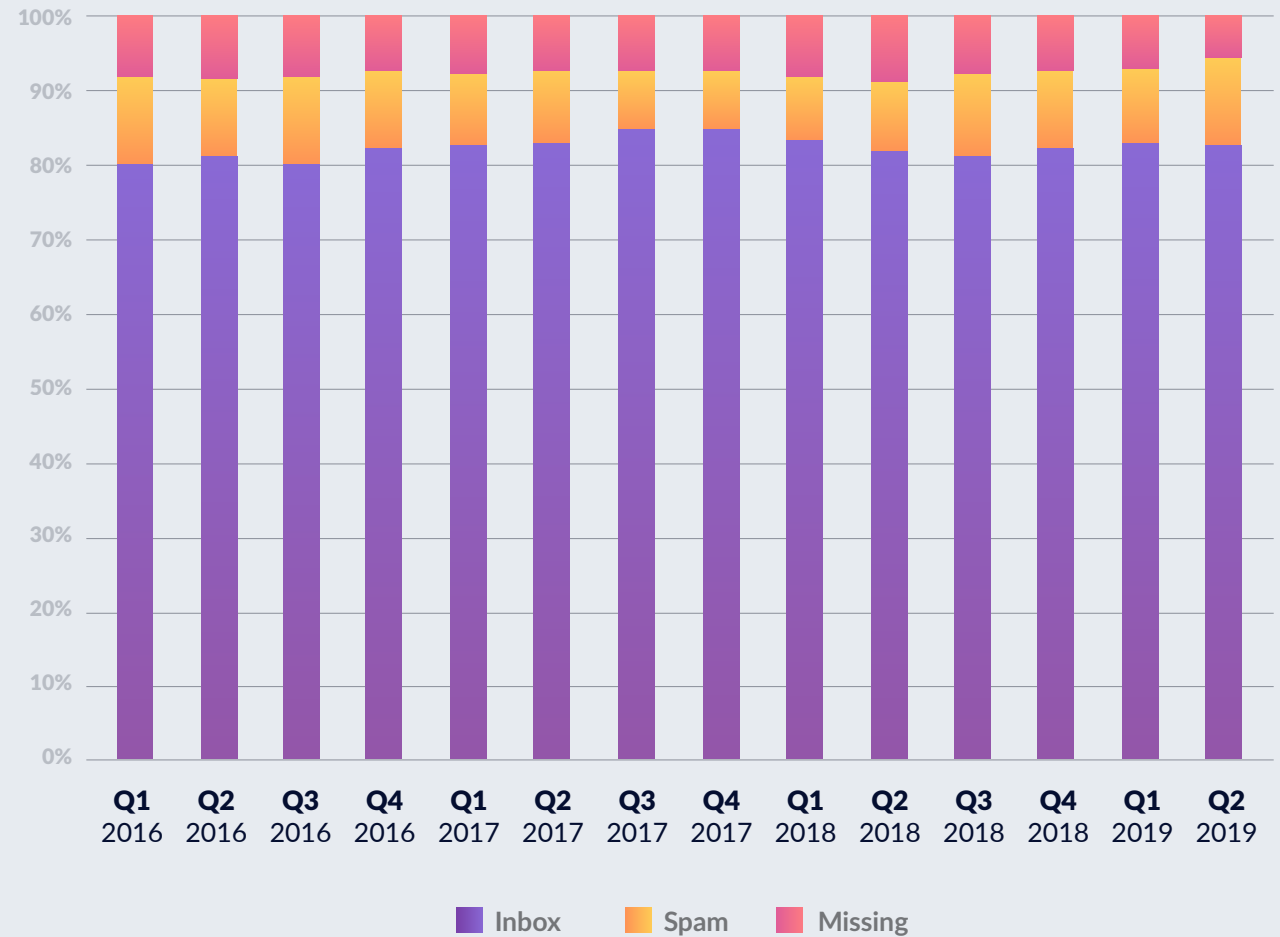
CANADA QUARTERLY IPR SINCE 2016



Europe

The first half of 2018 was a time of turmoil and uncertainty for many marketers as GDPR enforcement knocked on the door. Countless marketing companies sent emails requesting new or upgraded consent from their subscribers, whether necessary or not. The quarter following shows a noticeable dip in IPR to 82.5% in Q2 2018, following GDPR, but we've seen a recovery to 82.9% in Q1 2019.

EUROPE QUARTERLY IPR SINCE 2016



Conclusions

Inbox placement rates are generally strong for marketers, with improvement across much of North America and only a small decline in the European Union. Are these fluctuations the result of changes in legislation, such as CASL and GDPR, effecting sending practices in regions affected by stricter guidelines?

Google's ongoing dominance of the consumer inbox continues to put pressure on marketers to follow Gmail's marketing best practices and reputation guidelines. Similarly, strengthening legislation also may be driving better adoption of consent practices, which could, in turn, spur better delivery and performance. Couple this improvement in practices with stronger email authentication, and global deliverability seems poised to continue to grow.

About the Authors



Alexander Heinz

250ok, Product Manager

Alexander is the Product Manager at 250ok with nearly a decade of experience in the industry (Adobe Campaign and Vistaprint). All of his time spent in the email world has been in roles focused on solving deliverability issues and developing tools and strategies to optimize clients' inbox performance.



Matthew Vernhout

250ok, Director of Privacy and Industry Relations

Matthew Vernhout is a digital messaging industry veteran and Certified International Privacy Professional (Canada) (CIPP/C) with nearly two decades of experience in email marketing. Matthew is 250ok's Director of Privacy, the Vice Chair of the Email Experience Council (eec), director at large with the Coalition Against Unsolicited Commercial Email (CAUCE) and the founder of the Canadian Email Summit. He is a trusted industry expert, recognized as the 2019 eec Thought Leader of the Year, speaking frequently at email marketing and technology conferences around the globe.

About 250ok



250ok is a SaaS platform bringing marketers advanced insights into email deliverability, design, sender reputation, fraud protection, and consumer engagement—the ultimate intelligence add-on to any ESP. Headquartered in Indianapolis, Indiana, 250ok’s platform provides data and insights for a large and growing number of businesses in categories ranging from travel, publishing, tech, and retail—including four of the top six US retail eCommerce companies by sales share in 2018. For more information, visit 250ok.com.

