



2025

Email Deliverability Benchmark Report

An Analysis of Inbox and Spam Placement Rates Worldwide

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Introduction

Email remains one of today's most powerful marketing channels, consistently delivering an impressive return on investment.

But even the best-crafted emails are worthless if they never reach the inbox. That's why email deliverability isn't just a technical concern: it's the foundation of every successful email strategy.

Yet, reaching the inbox is more challenging than ever. Economic uncertainty, privacy laws,

shifting consumer behaviors, and rapidly evolving technology make it harder for senders to connect with their audiences.

In this report, Validity's exclusive data network uncovers why global deliverability took a hit in 2024—and what email marketers must do to adapt.

Here's what to expect:

- **An analysis of global email deliverability, covering inbox placement, spam filtering, and missing emails**
- **Expert advice on optimizing deliverability with top mailbox providers**
- **Industry-specific insights into email performance and deliverability trends**
- **Practical steps senders can take immediately to enhance their email success**

Let's dive in.

Key findings

One in six legitimate marketing emails fails to reach the inbox (a decline from our last report).

Global spam placement rates almost **doubled** from Q1-Q4 2024.

With inbox placement rates of **75.6 percent**, Microsoft is the toughest Mailbox Provider (MBP) for deliverability.

Europe remains the best-performing global region, with inbox placement rates of **89.1 percent**.

AI is having unintended consequences on deliverability.

Gmail, which now accounts for almost one in every two consumer mailboxes globally, showed an unexpected deliverability decline of almost **five percent**.

The US has an inbox placement rate **six** percentage points lower than select countries that require double opt-in methods.

Understanding email deliverability

Before we get *too* deep into the details, let's start with the basics: What is email deliverability?

At its core, deliverability is a sender's ability to reach the inbox—not the spam folder.

Seems straightforward, right? Not so fast. Many senders rely on the “delivered” rate shown by their email service providers (ESPs) to gauge success. But here's the catch: “delivered” doesn't necessarily mean the email reached the inbox.

Emails can land in several places—the inbox, the spam folder, or even blocked at MBP gateways before reaching the recipient.

Most ESPs still report delivery as a simple “sent minus bounced” equation. Since global bounce rates for permission-based email marketing hover around 1.5 percent, delivery is often reported at ~98.5 percent. But that's only half the story. This metric tells you how many emails were accepted, not whether they reached the inbox or got buried in spam.

Senders who don't actively manage deliverability are rolling the dice on inbox placement. A strong deliverability strategy helps you avoid spam folders, maximize visibility, and ensure your emails work as hard as you do.

Validity views deliverability through the lens of 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 measures how many emails were delivered to the inbox versus the spam folder.

Spam placement rate:

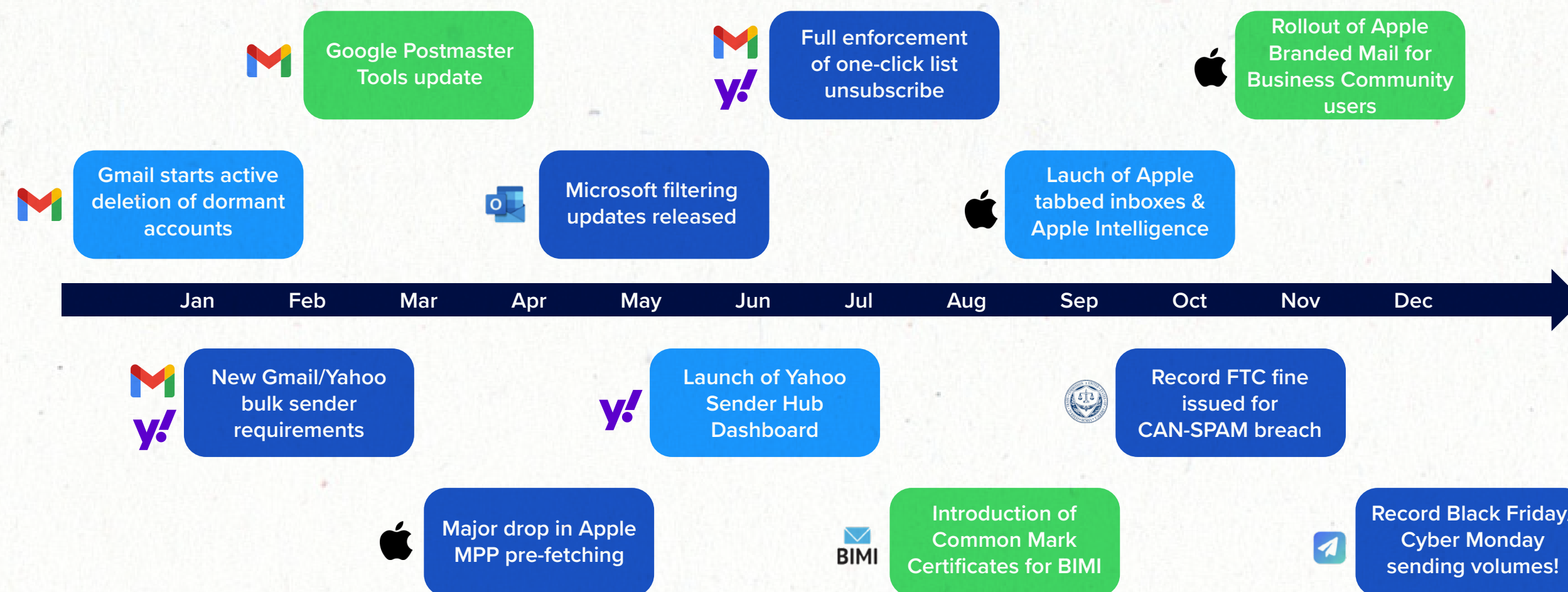
The number of emails delivered to the spam folder out of total emails sent. It shows the percentage of emails that were identified as unsolicited bulk email or spam by the receiving MBP's spam filtering system.

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.

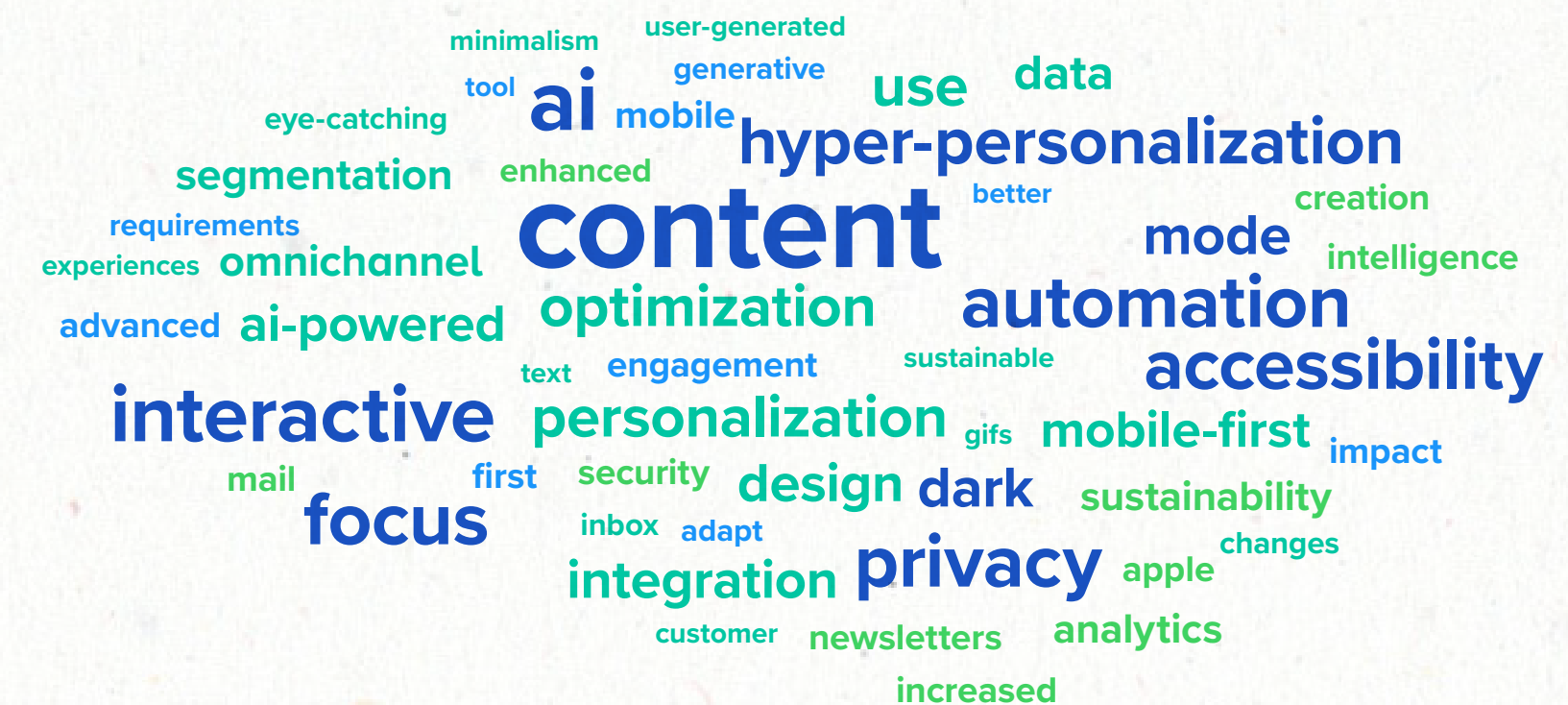
2024's major email developments

2024 was a year of relentless disruption for email marketers. The new Gmail and Yahoo sender requirements, significant changes to Microsoft filtering, and the introduction of Apple Intelligence pitched new deliverability curveballs at often unprepared senders. The following timeline shows some of the key events throughout the year.



Many of these developments had significant implications for email deliverability (both positive and negative), which we'll highlight in this report.

Unfortunately for email marketers, the rate of change in 2025 will likely be even greater. This word cloud (generated from a curation of industry news articles) illustrates the many key challenges senders now face.



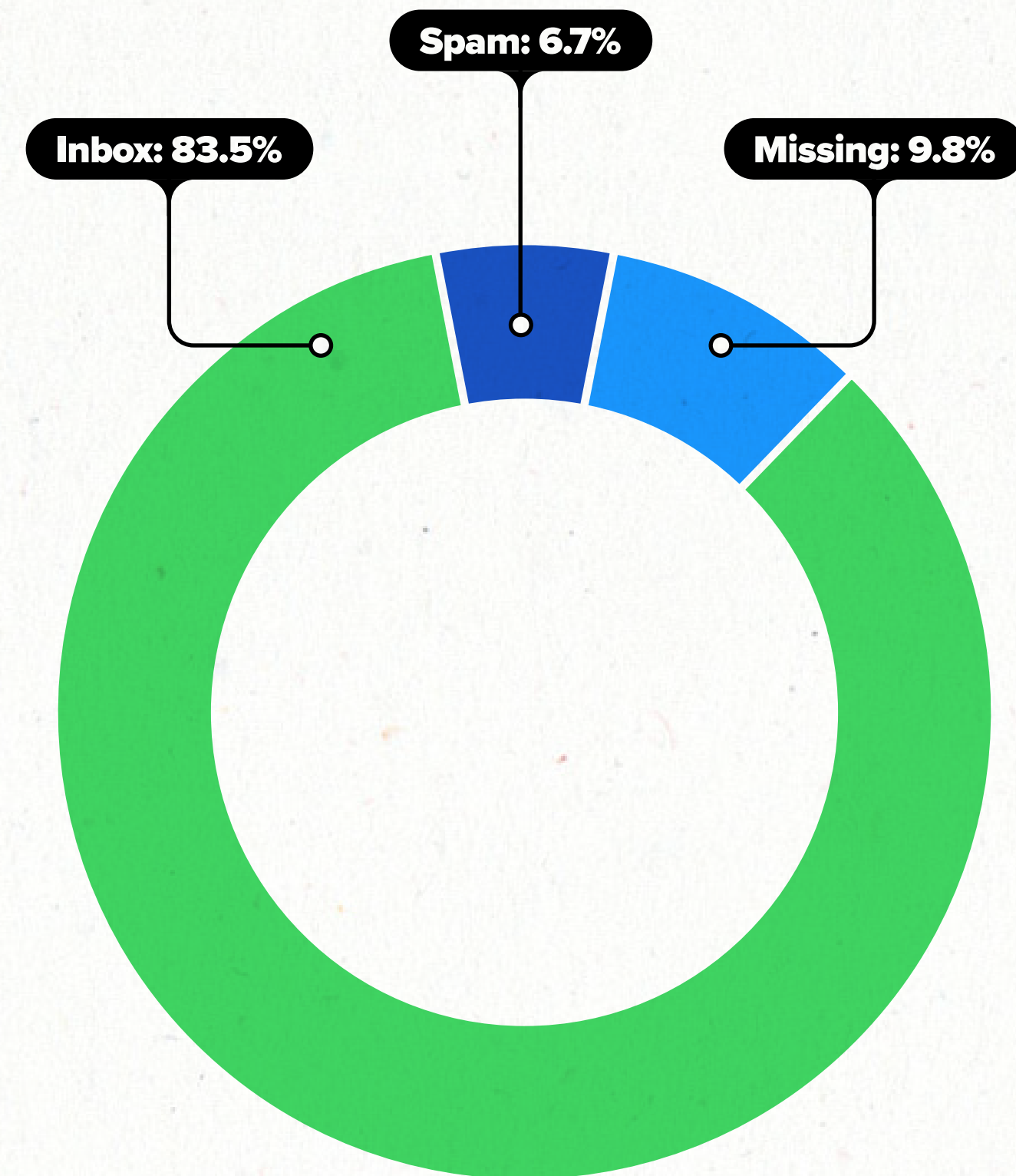
Artificial intelligence, data privacy, hyper-personalization, mobile-first design, and a renewed focus on accessibility (to name a few) will continue re-shaping email marketing this year and in years to come.

Global deliverability

At a global level, inbox placement rates (IPRs) declined slightly since Validity's previous report. In our last edition, we reported an inbox placement rate of 84.8 percent, spam placement at 6.1 percent, and a missing rate of 9.1 percent.

FIGURE 1

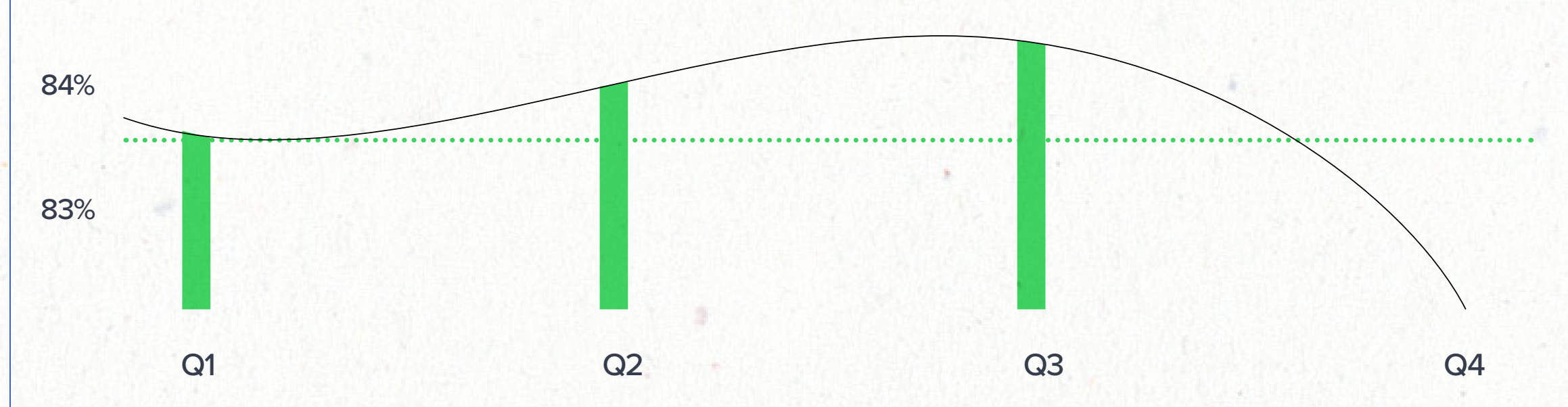
Global deliverability performance



GLOBAL DELIVERABILITY

FIGURE 2

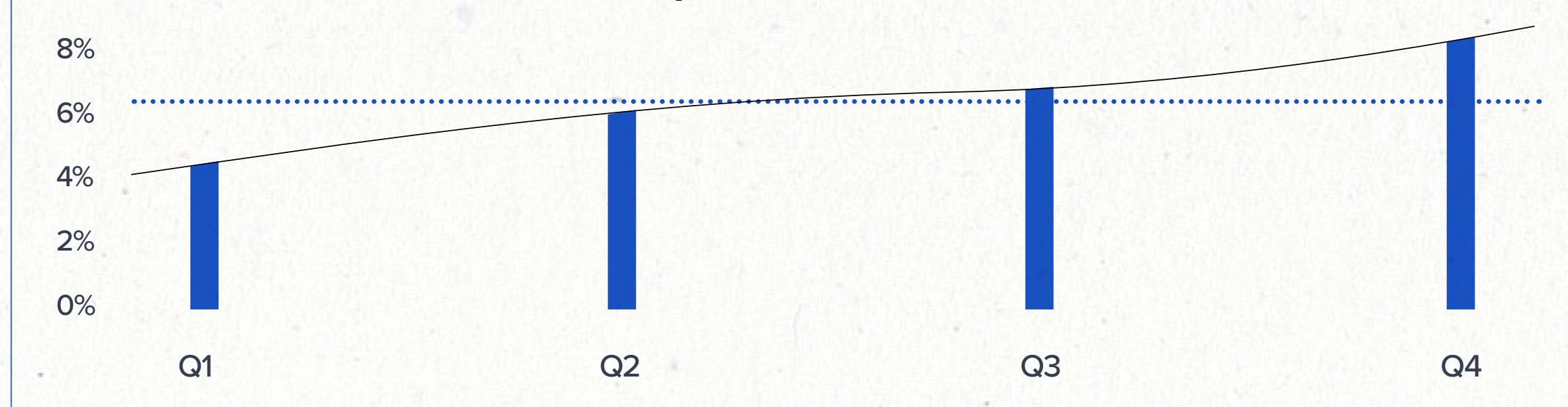
2024 Inbox Placement Rates



However, this decline doesn't tell the full story. As recently as February 2024, IPRs were just below 87 percent. Since then, they have trended downwards. During the business-critical peak sale season in Q4, they dipped to 82.3 percent.

FIGURE 3

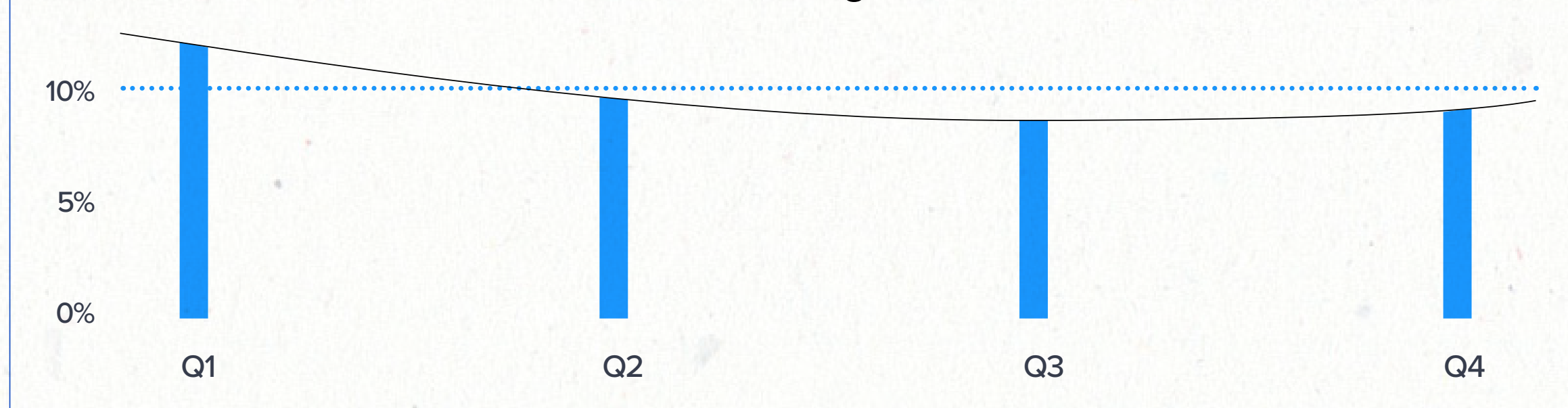
2024 Spam Placement Rates



Interestingly, spam and missing rates trended in opposite directions throughout the year. Spam placement almost doubled, growing from 4.5 percent in Q1 to 8.6 percent in Q4.

FIGURE 4

2024 Missing Rates



Missing rates moved the opposite way, declining slightly from 11.9 percent in Q1 to 9.1 percent in Q4.

What does this all mean? Email service providers have succeeded in getting fewer messages rejected or blocked by mailbox providers. But the likelihood of those accepted emails being placed in spam or junk has increased significantly.

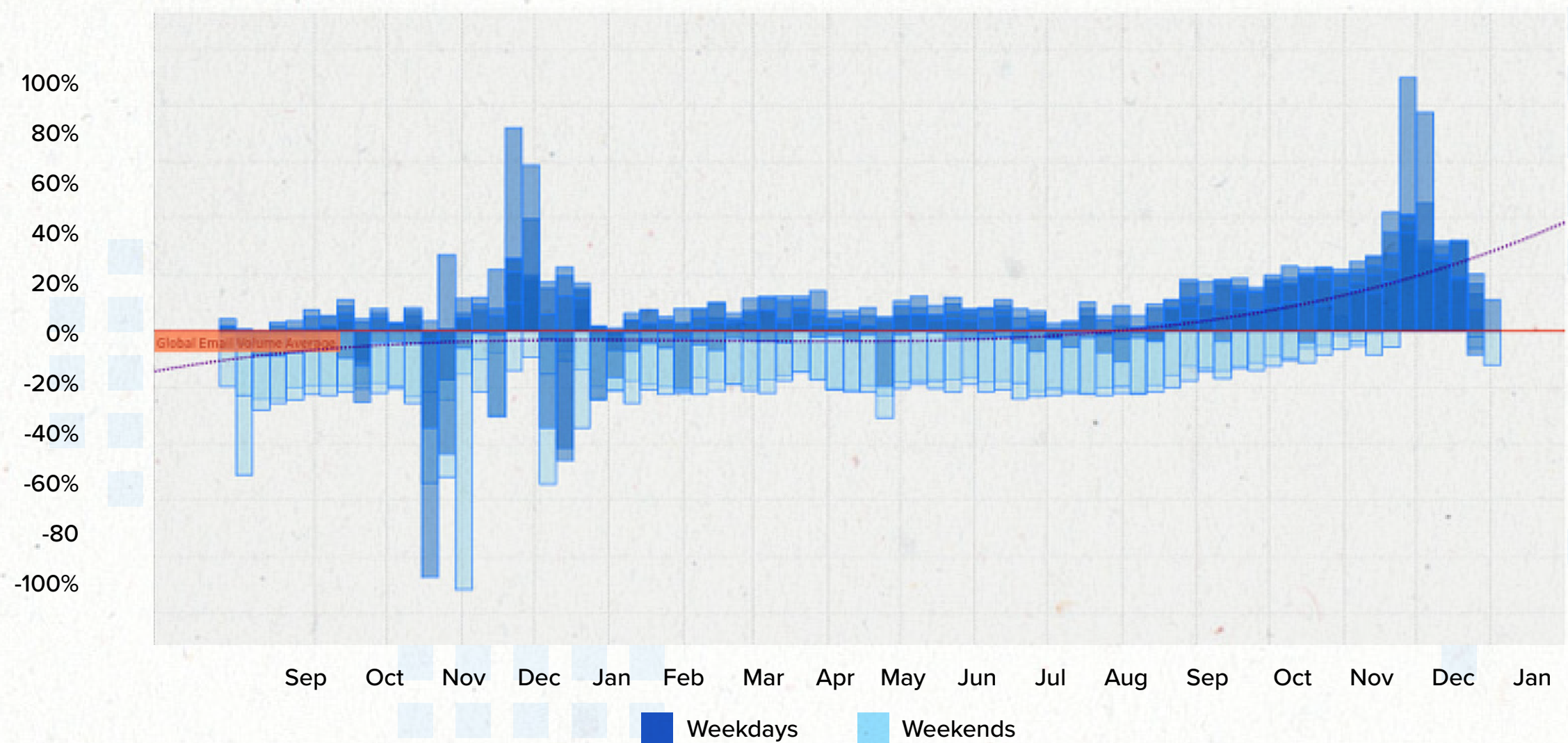
Global sending volumes

Global sending volumes increased throughout 2024, creating additional pressure on global deliverability. This chart from Validity’s *State of Email Live* webinar series shows the past 18 months, from July 2023 to December 2024. The upward trend is clearly visible.

Black Friday in particular highlights the increase—both in terms of greater volume on the day, and greater concentration of email volume in the days surrounding the event.

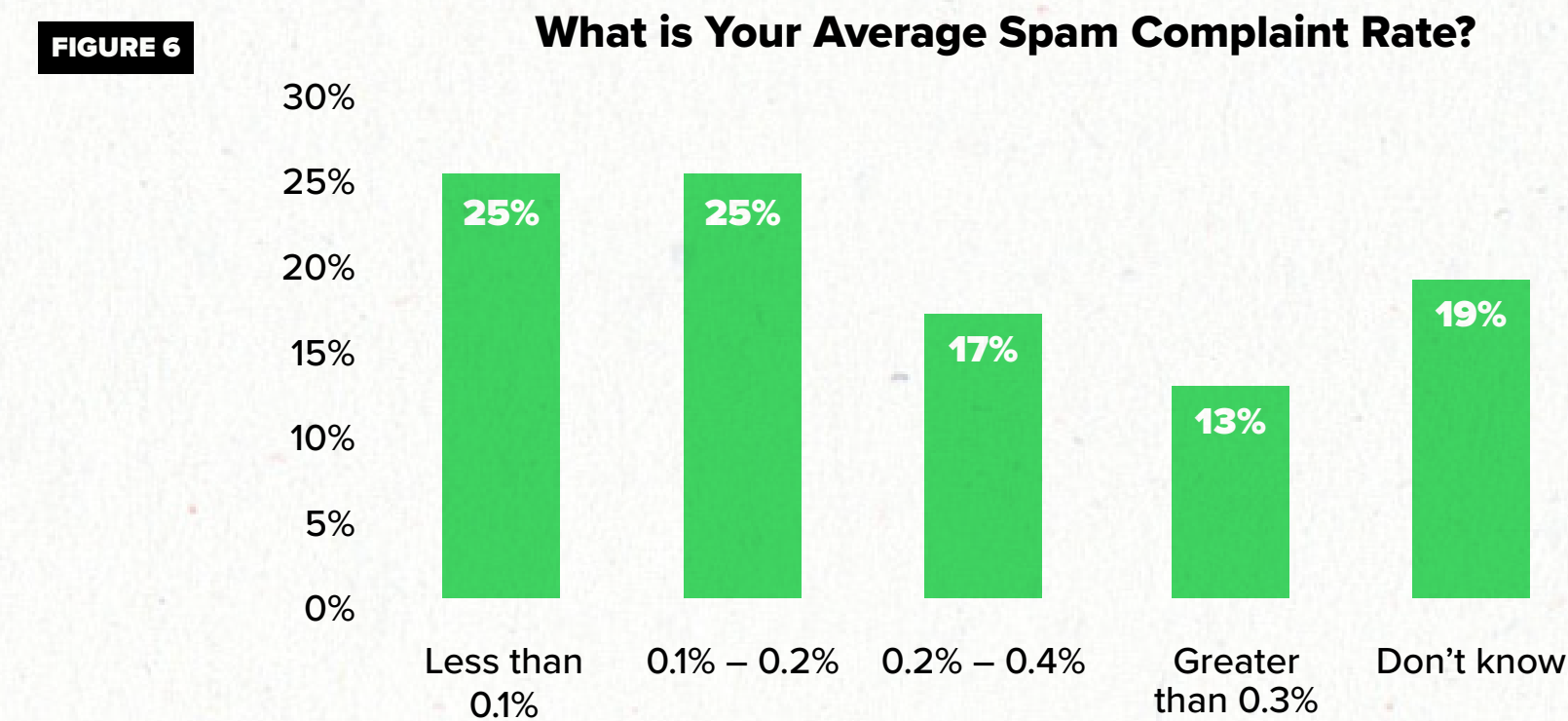
FIGURE 5

Global Sending Volumes



Spam complaint rates

As mentioned, Gmail and Yahoo’s new bulk sending requirements were a headline story in 2024. These required senders to adopt DMARC, implement a one-click list unsubscribe record, and keep spam complaint rates below 0.3 percent. While many email programs are now compliant, many more are struggling. In a recent edition of Validity’s *State of Email Live*, we asked attendees the spam complaint rates for their programs.



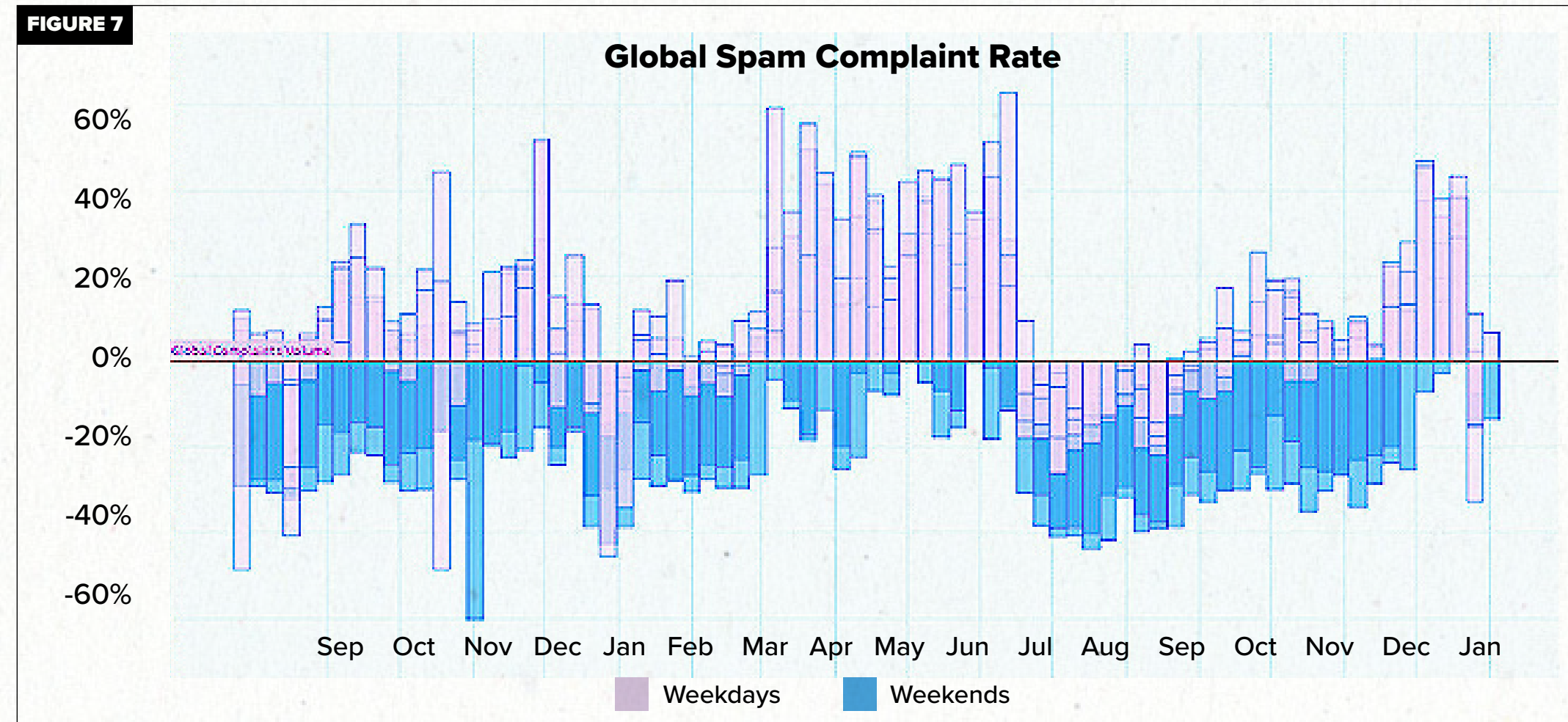
Only one quarter said they were in the <0.1 percent band associated with best practice email programs. This is a problem. Spam complaint rates are the single biggest factor to deprecate sender reputation. This means the other three-quarters of our respondents will all be experiencing some degree of deliverability challenges.

Validity’s global spam complaints data reflects this observation.

Over the course of 2024, we see an initial rise in complaint rates from March through early June, which coincides with the initial enforcement of the new

What is a spam complaint?

A “spam complaint” is when a recipient of an email manually marks it as spam or junk within their email client, essentially notifying the mailbox provider that they consider the message unwanted and undesirable.



Gmail/Yahoo requirements. After a dropoff in June, this metric trended sharply upwards over the rest of the year, mirroring the volume trend shown above.

The pink bars represent complaint rates recorded from Monday to Friday each week, while the purple bars represent Saturdays and Sundays. Senders who want to reduce their complaint rates should consider shifting more sending activity to the weekend, when overall volumes are lower and subscribers are more engaged.

The impact of AI on email deliverability

The massive rise in the use of artificial intelligence dominated most email marketing conversations in 2024. Many senders are now harnessing this technology to assist them with A/B split testing, audience segmentation, copywriting, dynamic content, hyper-personalization, image generation, product recommendations, send time optimization, and subject line generation.

However, AI has consequences on deliverability. For example:

- Mailbox providers are now deploying large language models trained on phishing/malware/spam as part of their enhanced filtering and security processes.
- AI-generated summaries do not always accurately reflect email content, leading to reduced engagement and increased spam complaint activity.
- Gmail's AI-generated annotations sometimes highlight unwanted content (e.g., expired offers) that will have negative consequences for engagement and complaints.
- We are seeing a significant increase in AI-generated spam emails, making subscribers less trustful of legitimate emails because it's harder to tell the difference.

Deliverability breakdown by mailbox provider

We use MAGY as an industry acronym for Microsoft, AOL, Gmail, and Yahoo. With AOL now merged into Yahoo, the “A” instead now refers to Apple (which includes important domains such as icloud.com and me.com).

As the table below shows, these MBPs collectively represent five-sixths of a typical email program’s total sending volume.

Mailbox Provider	Market Share	Inbox %	Spam %	Missing %
Gmail	48.5%	87.2%	6.8%	6.0%
Microsoft	16.8%	75.6%	14.6%	9.8%
Yahoo/AOL	14.0%	86.0%	4.8%	9.2%
Apple	3.8%	76.3%	14.3%	9.4%

Because of this weighting, these MBPs form an essential part of any email program’s deliverability strategy.

Let’s review the factors that senders should consider to ensure successful inbox placement at each one.

Video Series: Meet Your Mailbox Providers

To learn the nuances of deliverability at each MBP, check out our short, four-part video series.

Get the videos!



Gmail

Gmail sets high standards for email marketers and expects them to consistently follow email best practices.

Gmail has ± 2.5 billion users, meaning nearly half of all global marketing emails are sent to Gmail addresses. Because of this weighting, Gmail strongly influences the global benchmark.

In 2024, inbox placement rates at Gmail averaged 89.8 percent but declined to 84.2 percent by Q4.

Why the decrease?

Along with Yahoo, Gmail introduced new bulk sender requirements in Q1 2024 that compelled senders to implement a DMARC record, operate one-click list-unsubscribe functionality, and maintain spam complaint rates below 0.3 percent. These are all long-established industry guidelines, and we would expect a sender's deliverability to improve as they adopt these new policies (as has been the case at Yahoo).

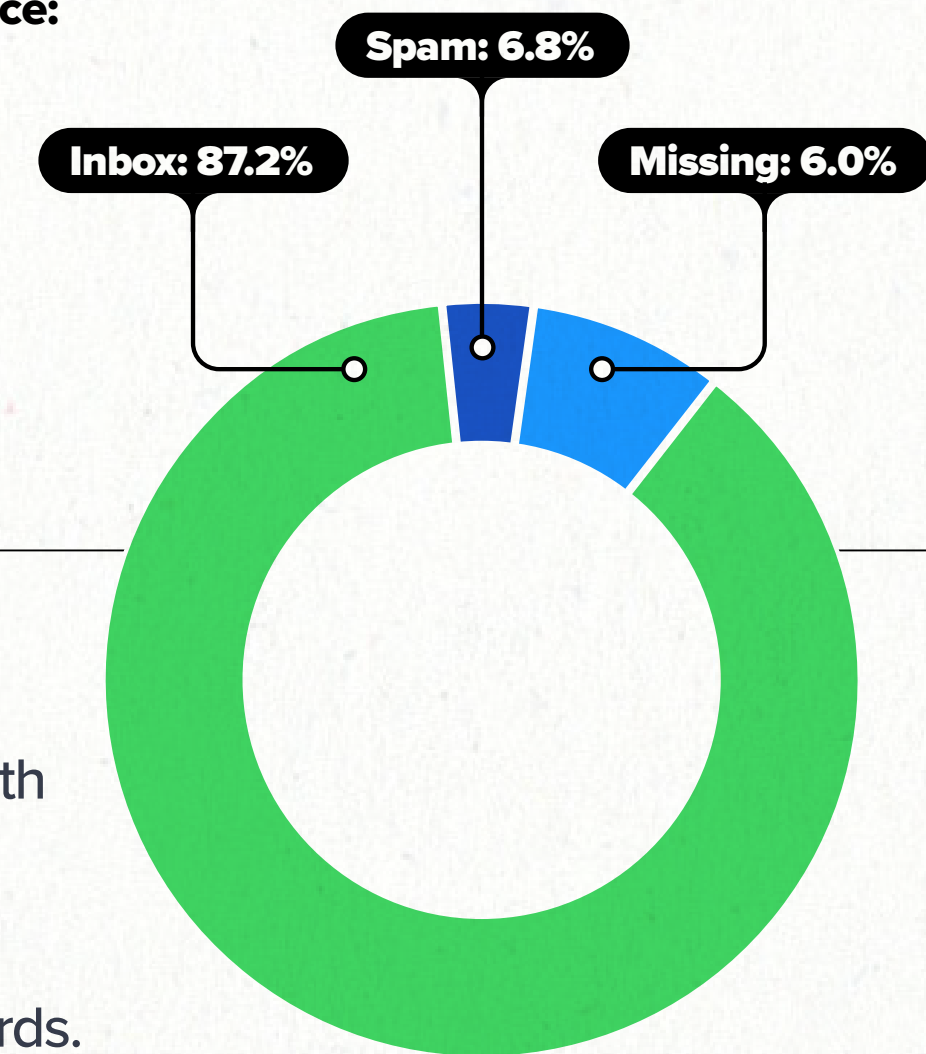
However, Gmail has also been active on many other fronts:

- Gmail updated Google Postmaster Tools (GPT) to provide senders with additional reporting around their compliance with the new bulk sender requirements.
- New soft bounce and hard bounce error codes were introduced as part of Gmail's enforcement of the new standards.
- Google is enforcing its policy of deleting dormant accounts that have been inactive for at least two years.
- Gmail is expected to introduce disposable addresses (Shielded Email) that will be similar to Apple's "Hide my Email" functionality.
- Gmail will introduce a subscription manager (already in place at Microsoft and Yahoo) to help users manage excessive emails.
- Gmail now uses AI to insert Annotation schemas into marketing emails. We have seen cases where this promotes expired offers, increasing the risk of spam complaints.

For guidance to achieve strong performance at Gmail, review Gmail's sender guidelines or visit Validity's Knowledge Center.

FIGURE 8

Deliverability performance:
Gmail



Microsoft

Microsoft remains one of the most challenging MBPs when it comes to achieving good deliverability.

Microsoft (which includes Hotmail and Outlook) remains the second-largest MBP globally and in many major markets. Like Gmail, Microsoft inbox placement rates dropped significantly in 2024.

Why?

Microsoft made significant updates to its spam filtering during Q2 2024, including the introduction of sophisticated AI models, and the impact is visible. Readers can learn more about these changes in our recent webinar with Microsoft.

While Microsoft has not yet officially aligned with the new bulk sender requirements, there are rumors that they will do so this year. Microsoft already lists the new standards in their sender guidelines as recommended best practices.

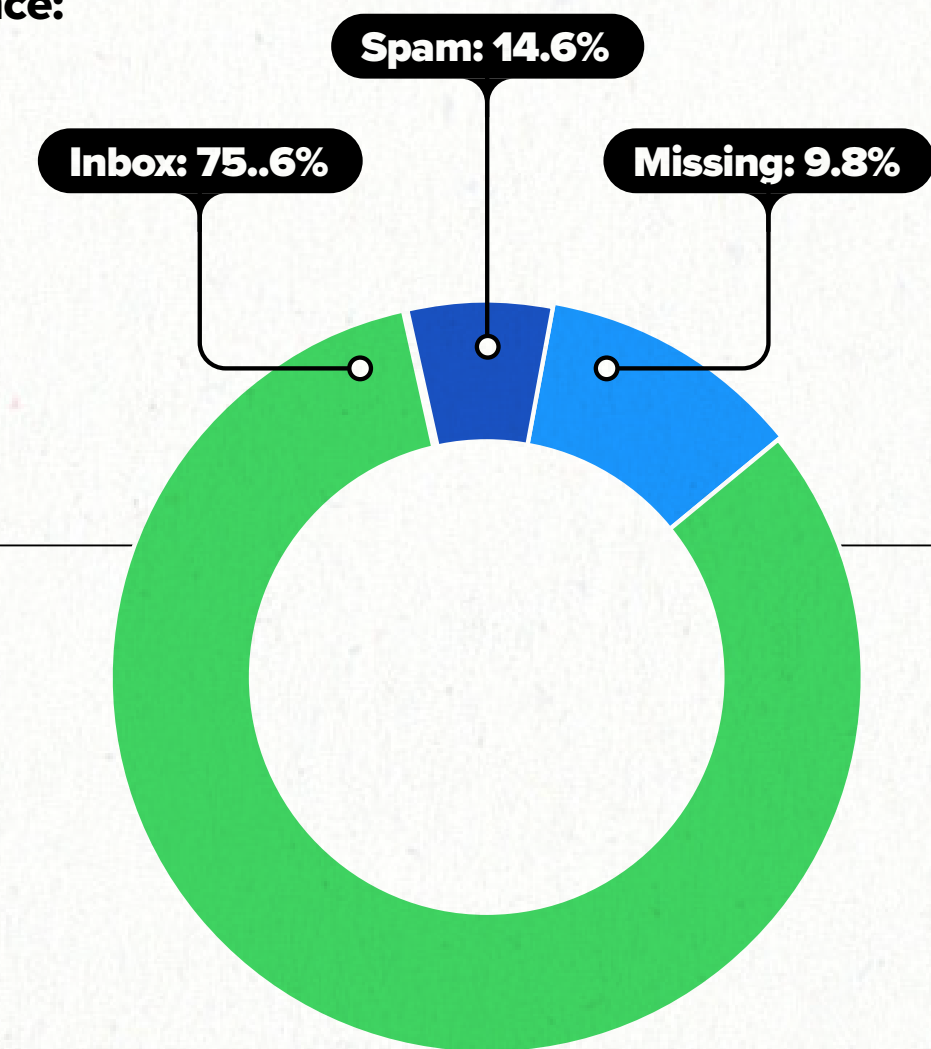
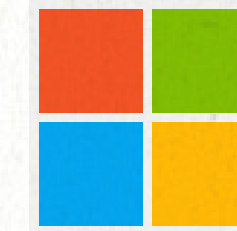
Microsoft is unique in its use of real-life subscriber feedback as part of its filtering processes, using this data to validate and train its AI processes. The global benchmark for negative votes is ± 25 percent—and programs scoring higher than this will experience deliverability challenges.

Microsoft spam complaint rates are higher than those of the other major MBPs. A potential reason for this is Outlook's Sweep functionality, which allows users to establish rules to bulk move emails into another folder (including junk).

For guidance on how to achieve strong performance at Microsoft, review Microsoft's sender guidelines or visit Validity's Knowledge Center.

FIGURE 9

Deliverability performance:
Microsoft



DELIVERABILITY BREAKDOWN BY MBP

Yahoo

Yahoo (including AOL) is the third largest global MBP, and a strong second in the United States. Unlike at Gmail and Microsoft, inbox placement rates at Yahoo improved slightly in 2024.

Notably, Yahoo did not introduce new error codes as part of its new bulk sender requirements—and it's possible senders benefitted from this “lighter touch” enforcement. Bear in mind that senders who do not comply with Yahoo's new requirements are not eligible for deliverability mitigation. (The same holds true at Gmail.)

Like Gmail, Yahoo was also active on several other fronts apart from its new requirements. Major activities included:

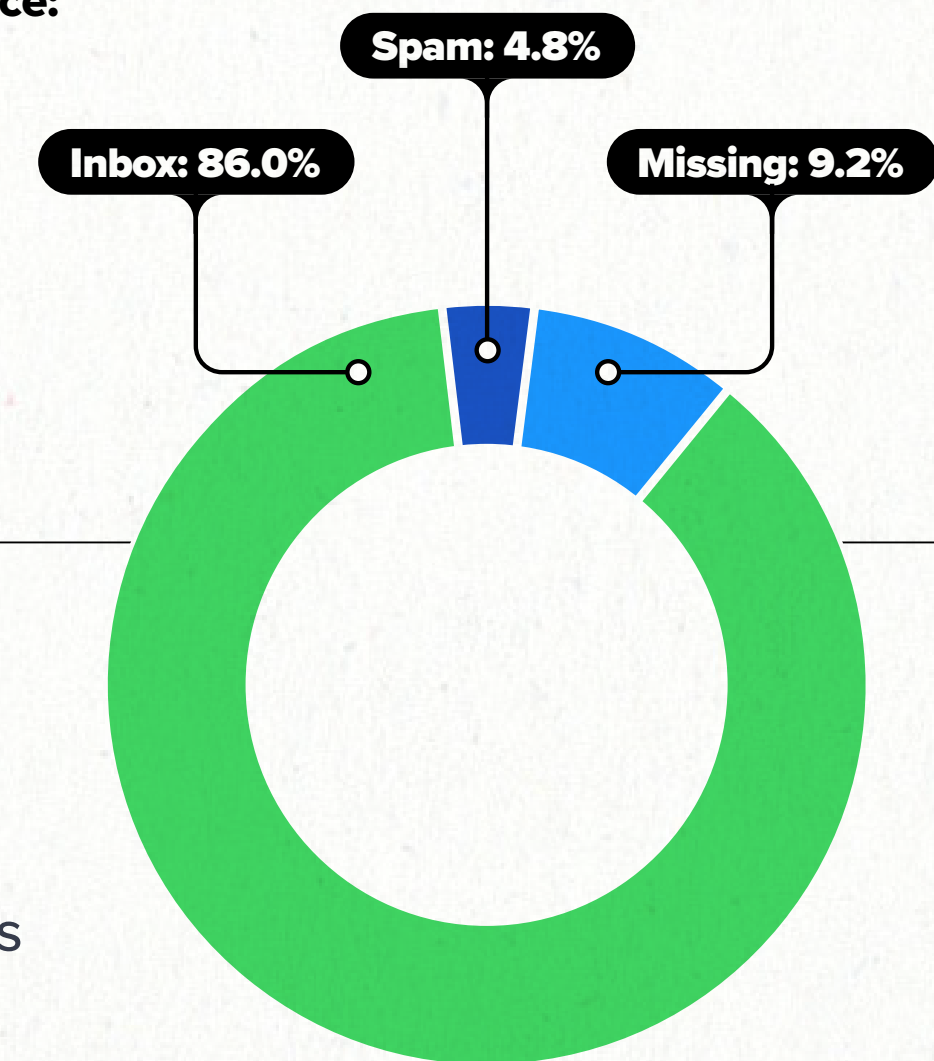
- Yahoo introduced a new sender dashboard to help email programs maintain compliance with the new bulk sender standards. The dashboard also helps senders with the implementation of Accelerated Mobile Pages (AMP), promotional schemas, and Brand Indicators for Message Identification (BIMI).

- While less publicized than Gmail's initiative, Yahoo now deletes dormant accounts that have been inactive for 12 months or longer.
- New AI-powered functionality has been introduced for Yahoo inbox users allowing them to create AI-generated summaries of their messages. Other updates include quick action buttons, starred view panels, and the ability to link to other email accounts.

For guidance to achieve strong performance at Yahoo, review Yahoo's sender guidelines or visit Validity's Knowledge Center.

FIGURE 10

Deliverability performance:
Yahoo



DELIVERABILITY BREAKDOWN BY MBP



Inbox placement rates at Apple rose in mid-2024, peaking at 78.4 percent in Q2 and dropping back to 75.6 percent by Q4.

Deliverability at Apple has been tumultuous since the introduction of Mail Privacy Protection (MPP) in 2021. While Apple’s guidelines recommend senders “periodically remove inactive subscribers,” the obfuscation of open tracking introduced by MPP made good recency management much harder to apply at this MBP.

While Apple’s global market share is the smallest of the MAGY providers, its importance is much greater than meets the eye—± 40 percent of all marketing emails are read on iPhones. Furthermore, Apple is a relentless innovator in the marketing space, with a strong focus on customer privacy. In other words, when Apple makes changes, email marketers are forced to pay attention.

Apple’s most important developments in 2024 included:

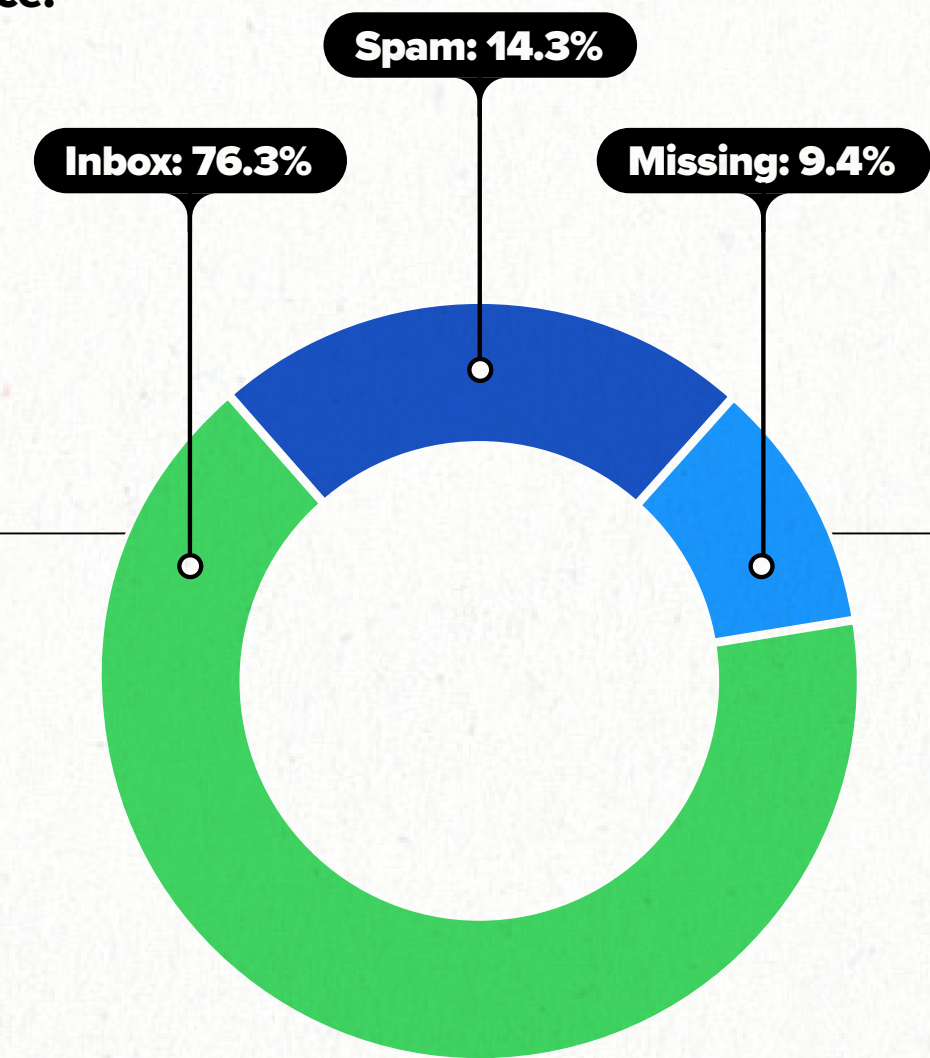
- The introduction of tabbed inboxes for Apple Mail users. Similar to Gmail tabs, emails will be categorized as Primary, Transactions, Updates, or Promotions.
- Apple Intelligence is a suite of generative AI tools to help users with writing and editing, image creation, and personal organization. A major implication for email senders is the use of Apple Intelligence to create email summaries.
- B2B users can now use Apple Branded Mail to display their official logos in a similar way to that already provided by BIMl.

For guidance on how to achieve strong performance at Apple, review Apple’s sender guidelines or visit Validity’s Knowledge Center.

FIGURE 11

Deliverability performance:

Apple



Global mailbox provider performance

Reviewing the major global MBPs shows how widely inbox placement rates vary across different countries. While one might expect standardized deliverability processes to deliver standardized deliverability outcomes, this isn't the case.

These results provide an important reminder that deliverability is not just a function of the MBPs' technology—it's also influenced by factors like language, demographics, local laws and customs, and even differences in social behavior.

We will examine these factors in greater detail in the "Regions and Countries" section of this report.

Regional providers

Outside of the MAGY providers, there is a shortlist of regional MBPs who represent the remaining 17 percent of global coverage.

This list shows the top 10, which, in combination, represent an additional 9.3 percent of total email subscribers.

FIGURE 12

Mailbox provider	Market Share	Inbox	Spam	Missing
Yahoo (UK)	1.8%	80.9%	2.6%	16.6%
Orange	1.5%	81.9%	2.7%	15.3%
AT&T	1.1%	83.1%	2.9%	11.3%
Comcast	1.1%	83.1%	2.9%	11.3%
Big Pond	1.1%	78.6%	0.5%	20.9%
GMX	0.8%	88.0%	3.1%	8.9%
BT Mail	0.7%	75.6%	2.7%	21.9%
Web.de	0.6%	85.4%	2.9%	11.7%
SFR	0.4%	82.1%	2.1%	15.8%
QQ	0.4%	74.8%	5.7%	19.5%

The average inbox placement rate for these MBPs is 81.7 percent, lower than the 84.2 percent MAGY benchmark. Note the very different ratio between “Spam” and “Missing”—for MAGY, these values are 8.4 percent and 7.5 percent respectively, while for regional MBPs they are 2.8 percent and 15.5 percent respectively.

From these variances, we can infer that senders pay less attention to deliverability with these smaller MBPs (understandably). However, we should remember that depending on where an individual email program’s audience resides, these regional MBPs may be more important. For example, Orange represents slightly over nine percent of all email marketing activity in France, while BigPond hosts nearly six percent of all Australian subscribers.

The data also tells us that filtering practices are less nuanced at these providers, and content these MBPs don’t trust is far more likely to be blocked or rejected. While global MBPs typically manage deliverability in-house, the regional providers are more likely to partner with an external filtering vendor to make filtering decisions.

Senders must pay close attention to the presence of these MBPs on their mailing lists, as they potentially indicate subscribers who do not live in the sender’s primary jurisdiction. For example, QQ (China) is a top 10 MBP for both US and UK senders, while Yahoo UK represents a similar proportion of Australian emailing.

Privacy legislation like Europe’s General Data Protection Regulation (GDPR) states that the law applies to any organization that processes personal data of individuals residing within the European Union (EU) or European Economic Area (EEA), *regardless* of where the organization is based. Senders should be laser-focused on understanding where their subscribers reside and on ensuring compliance with any regional legal obligations.

Deliverability by region

Email deliverability isn't a one-size-fits-all game—where your recipients are located can have a big impact on whether your emails make it to the inbox. Different regions have unique mailbox providers, spam filtering technologies, and regulatory requirements that shape deliverability outcomes. Understanding these regional nuances is key to optimizing global email performance and ensuring your messages reach the right audience—no matter where they are.

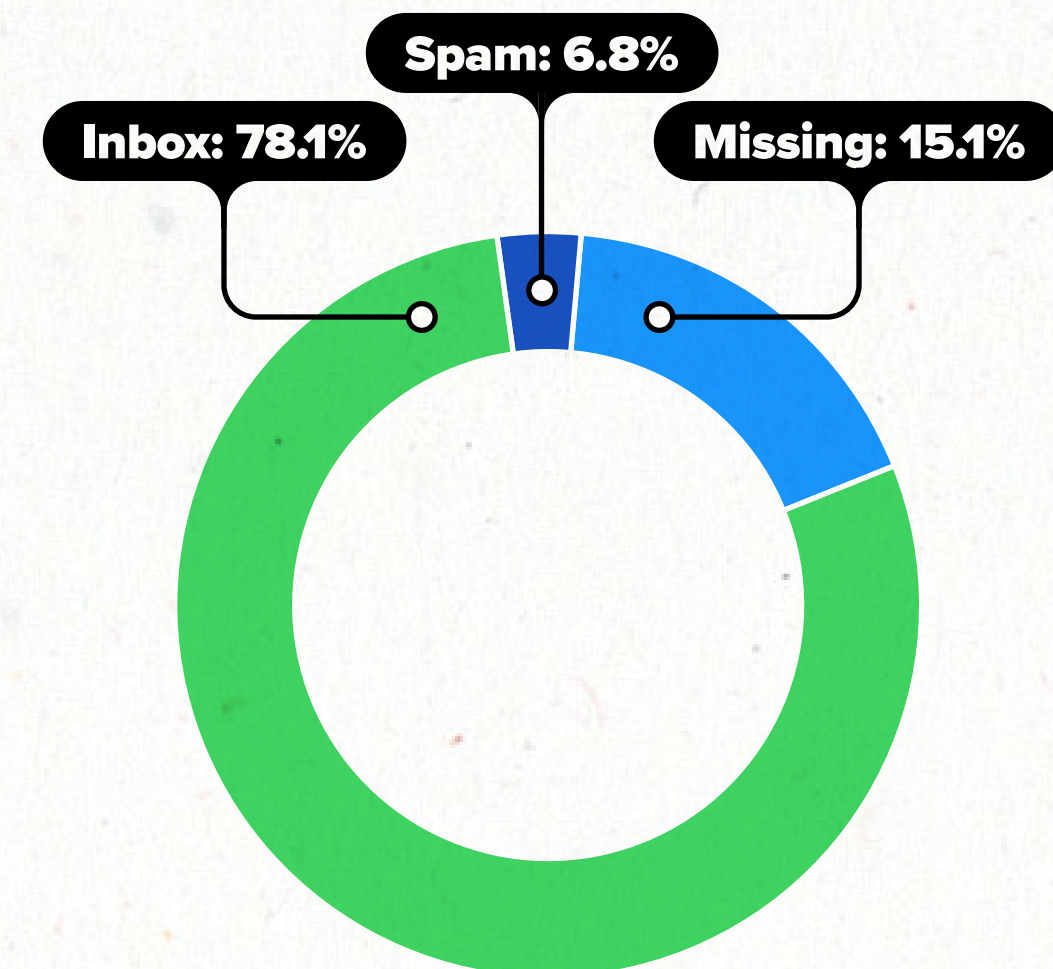
Asia

Many of Validity's customers are based in China and India, and there is also a significant concentration in Singapore. Each country poses unique challenges, which we'll consider in more detail next.

FIGURE 13



Deliverability performance:
Asia



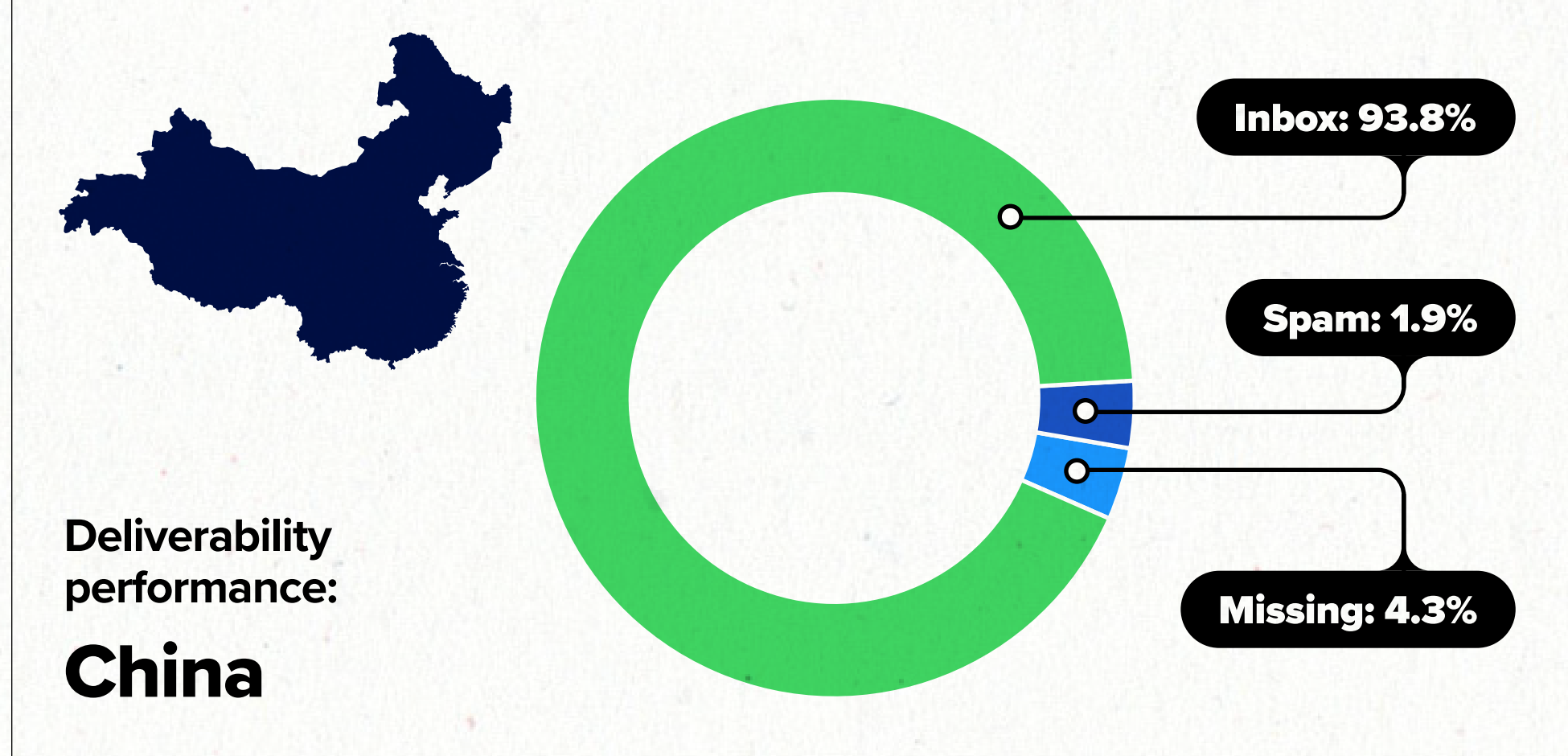
Asia
China

China’s already excellent inbox placement rates improved slightly on the results from Validity’s previous benchmark report (in which they were reported as 92.7 percent). Many of our customers in this country use Validity’s Sender Certification solution and benefit from the trusted sender status this gives them.

The major Chinese MBPs in our data set are QQ, 163.com, and 126.com, which together represent ± 80 percent of local Chinese providers. Average IPRs for these MBPs are only 64 percent, and marketers still face a major challenge dealing with their demanding deliverability requirements.

Apple’s weak performance is especially noticeable. Given its higher-than-average market share in China and the fact that Apple users are typically high-net-worth individuals, Chinese-based senders who can improve their inbox placement at Apple can unlock major revenue opportunities.

FIGURE 14



Mailbox Provider	Market Share*	Inbox %	Spam %	Missing %
Gmail	50.8%	90.1%	1.2%	8.6%
Microsoft	14.0%	89.7%	5.8%	4.5%
Yahoo/AOL	14.0%	60.7%	28.6%	10.6%
Apple	8.2%	37.4%	59.3%	3.3%
ATT	1.6%	91.7%	0.7%	7.6%

*Note that our market share values are based on the location of our customers’ marketing audiences. This set of data reflects the profile of their (multinational) marketing audiences rather than the China email market specifically.

Asia
India

Gmail dominates the Indian MBP landscape—Gmail hosts almost seven out of every eight email addresses in this country. This makes sense in a country where most consumers use Android devices. This also means that WhatsApp is a major channel for marketing activity in India.

Almost certainly related to this is the fact that India has the worst Microsoft IPRs for any of the individual countries in this report, and the second worst IPRs for Yahoo/AOL.

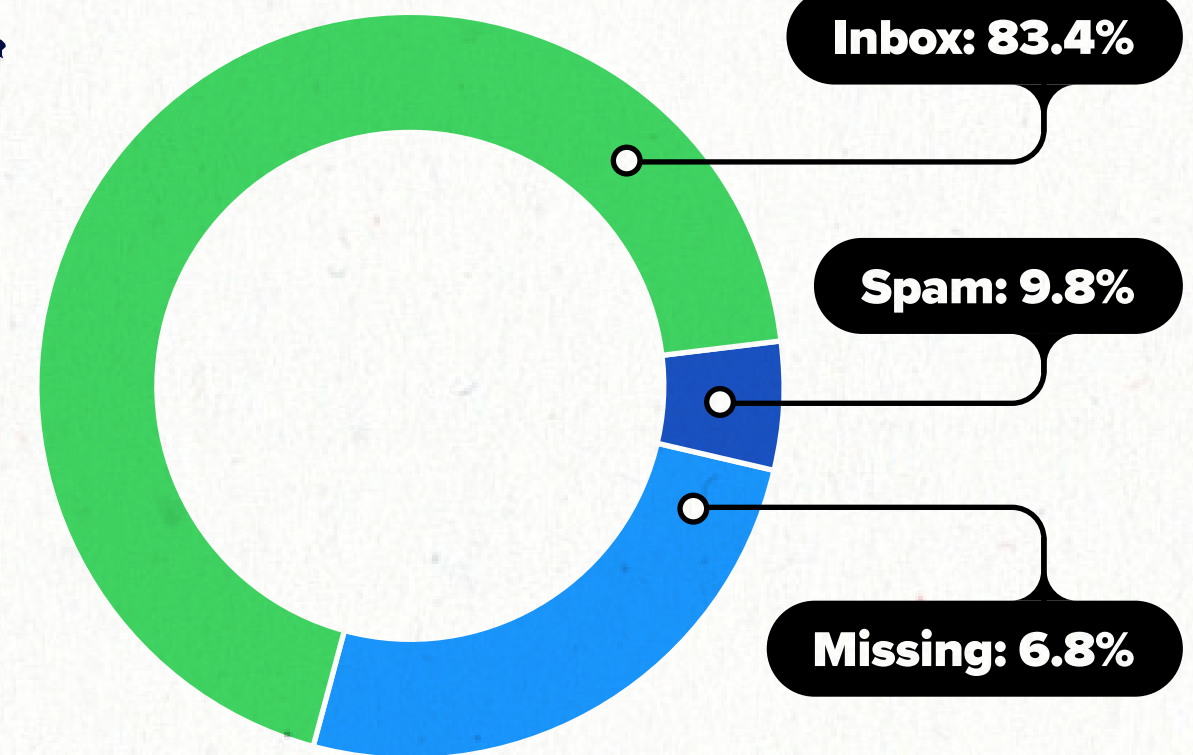
Our hypothesis is that Microsoft and Yahoo’s small percentage of total sending activity means they don’t receive the same deliverability attention from senders that we see in other major markets.

India’s Digital Personal Data Protection Act (DPDPA), which took effect in September 2023, is set to significantly influence how companies handle personal data in India. With new legal requirements for obtaining a valid reason for data processing and stricter rules on consent management, we expect this law to positively impact email deliverability this year.

FIGURE 15



Deliverability performance:
India



Mailbox Provider	Market Share	Inbox %	Spam %	Missing %
Gmail	86.7%	86.2%	11.5%	2.3%
Yahoo/AOL	5.2%	60.4%	35.6%	3.9%
Rediff	4.1%	25.7%	71.4%	2.9%
Apple	2.3%	72.5%	25.1%	2.5%
Microsoft	1.6%	48.3%	40.2%	11.5%

Europe

Europe’s average inbox placement rates show a slight decline since the previous edition of Validity’s benchmark report (which reported an average IPR of 91 percent).

Important recent developments in Europe that impacted 2024 deliverability include:

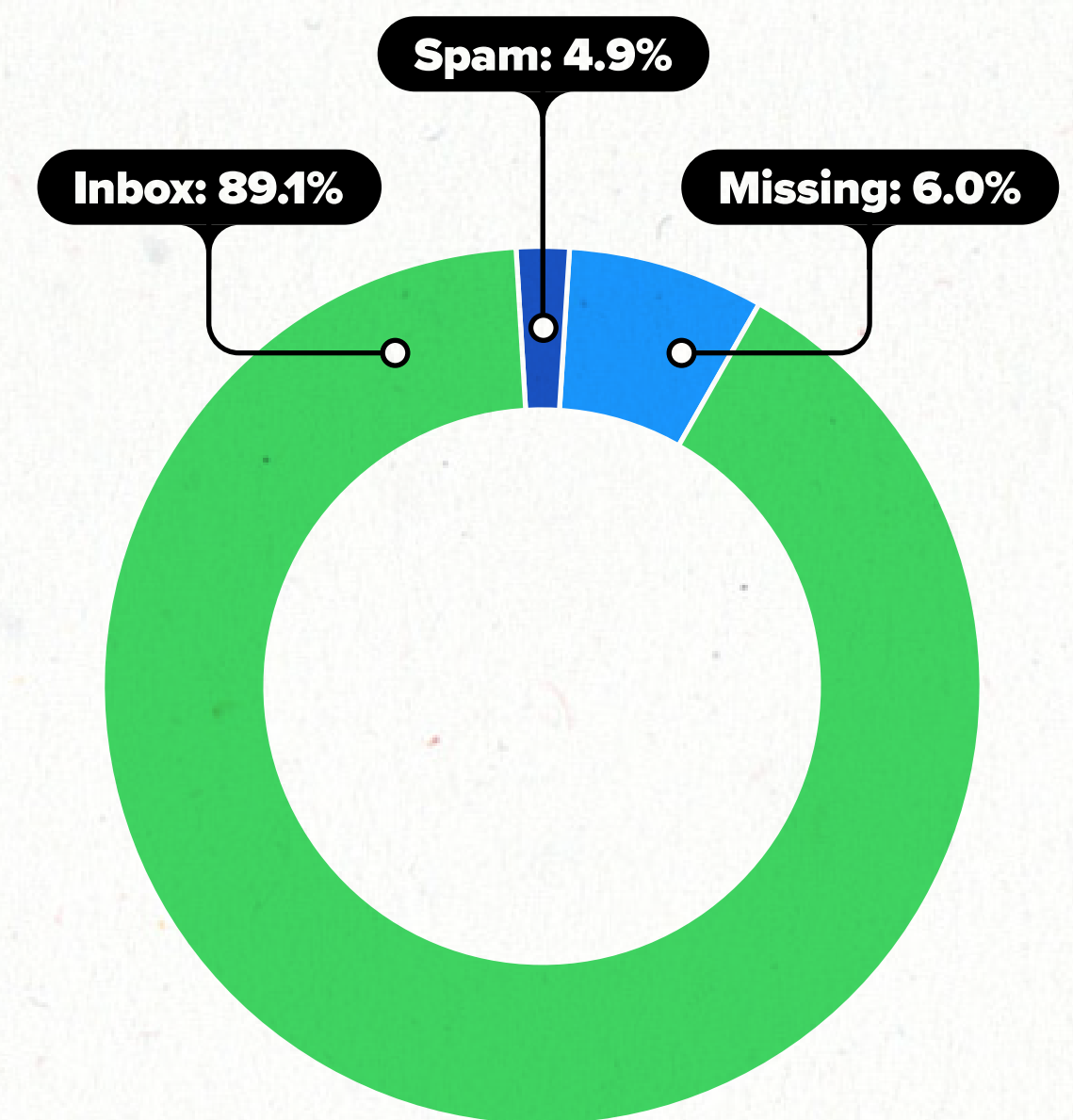
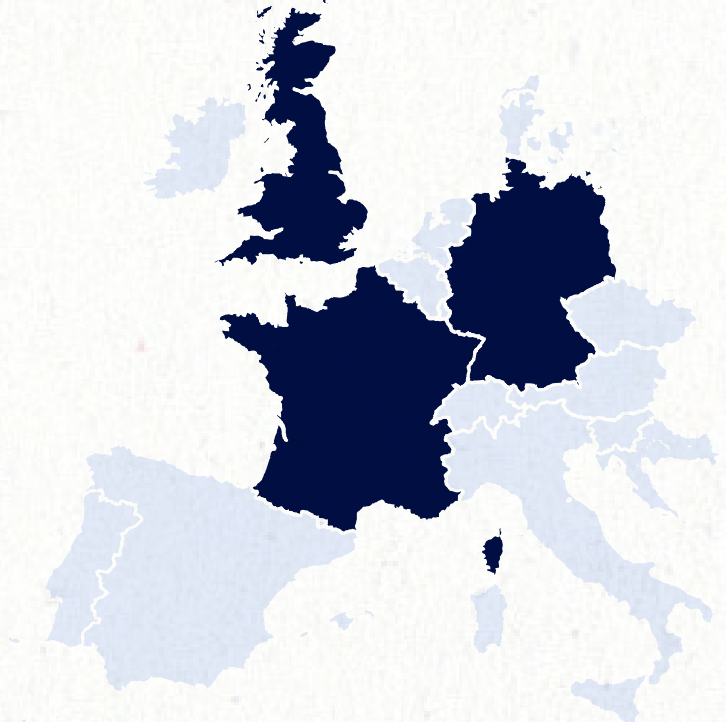
- The European Union’s [AI Act](#) came into force in August 2024, creating a comprehensive legal framework for AI use that applies to EU

organizations and consumers. Marketers everywhere should proactively assess AI-related risks in their email programs and understand how third-party tools use AI, as they’ll share liability if issues arise.

- The [email expiration date](#) project encourages senders to include a date in their email headers that instructs MBPs to delete emails when this date arrives.

FIGURE 16

Deliverability performance:
Europe



Europe

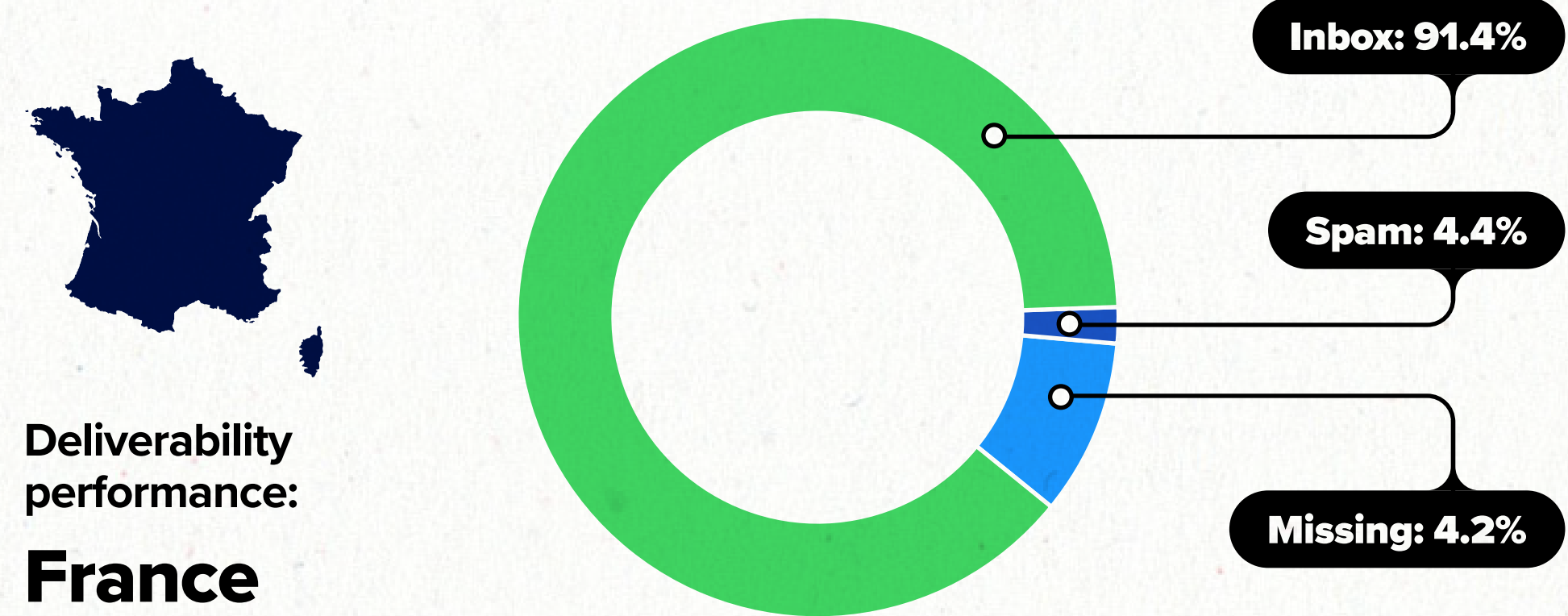
France

France experienced a significant deliverability uplift since Validity’s previous benchmark report (in which IPRs were reported at 88.7 percent). The MBP composition of this market has become more MAGY-centric in recent years, and senders are benefiting from the higher average placement at these MBPs.

[Orange](#) is the most dominant regional mailbox provider in France (and is also an important Validity partner). Other major local MBPs in France include SFR, Free, and LaPoste. Average IPRs for these local providers are 81.9 percent. When considering how to achieve strong deliverability in this country, note that many French providers partner with Vade for their filtering. Readers can learn more about this vendor’s requirements [here](#).

We should also note that in 2023, France passed laws banning the automatic printing of paper receipts. This led to increased use of e-receipts, which has created additional deliverability considerations for this region.

FIGURE 17



Mailbox Provider	Market Share	Inbox %	Spam %	Missing %
Gmail	37.7%	94.1%	4.4%	1.5%
Microsoft	18.3%	90.2%	5.9%	3.9%
Orange	9.2%	93.3%	0.2%	6.5%
Yahoo/AOL	5.9%	90.9%	4.5%	4.6%
Apple	2.4%	86.7%	8.7%	4.6%

Europe

Germany

Germany is the highest-scoring individual country in this report, although its score dropped slightly since Validity’s previous benchmark report (which reported German IPRs at 97.8 percent). Germany is also the only country with inbox placement rates above 90 percent for all major MBPs.

In addition to GMX, other important local providers include Web.de, T-Online, and Freenet. Average inbox placement rates for these MBPs are lower at 83.5 percent, which might reflect the challenges non-German senders face delivering to these providers.

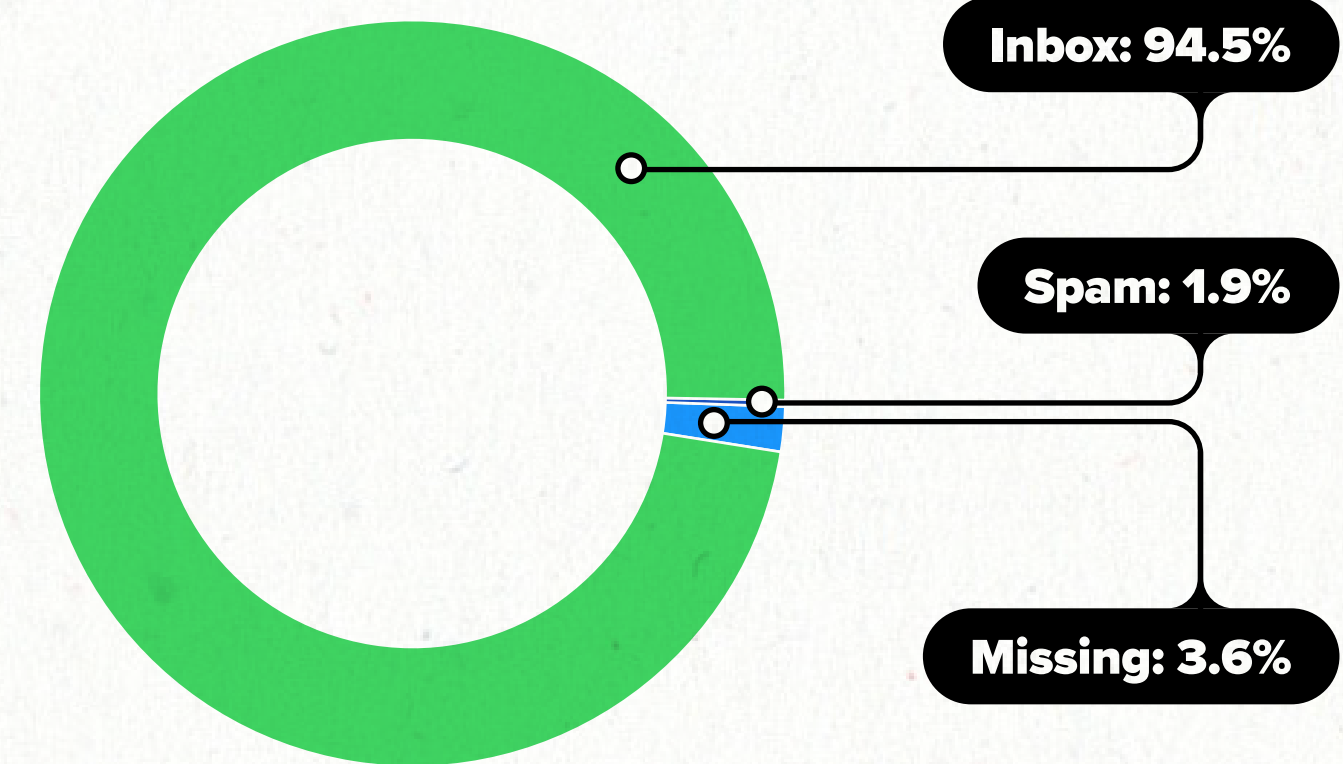
A major reason for the high IPRs in Germany is the near-universal use of the double opt-in consent mechanism. High levels of transparency exist because of the mandatory requirement to include “[impressum](#)” in the email footers. German senders must also comply with the [standards](#) set by the Certified Senders Alliance (CSA).

We explored factors that make Germany such a high-performing deliverability market in this [podcast episode](#).

FIGURE 18



Deliverability performance:
Germany



Mailbox Provider	Market Share*	Inbox %	Spam %	Missing %
Gmail	51.5%	96.7%	2.1%	1.1%
Microsoft	14.7%	90.3%	7.4%	2.4%
Yahoo/AOL	8.7%	97.1%	1.1%	1.8%
Apple	5.2%	92.4%	1.3%	6.3%
GMX	2.7%	91.6%	0.0%	8.4%

*As with China, our German market share values are based on the location of our customers’ marketing audiences. This set of data reflects the profile of their (multinational) marketing audiences, rather than the German email market specifically.

Europe

United Kingdom

The United Kingdom remains one of the world’s largest per capita MBP markets for Microsoft. Almost one-third of emails are sent to addresses hosted by this provider. The downside to this higher weighting is that Microsoft deliverability is so hard to achieve. This drags the UK’s overall IPR down by several percentage points.

Important local providers include BT Mail, Plusnet, TalkTalk, and Virgin Media, which together account for ± seven percent of the market. Average IPRs across these MBPs are 75.9 percent, suggesting their relatively small weighting means they receive less deliverability focus from senders.

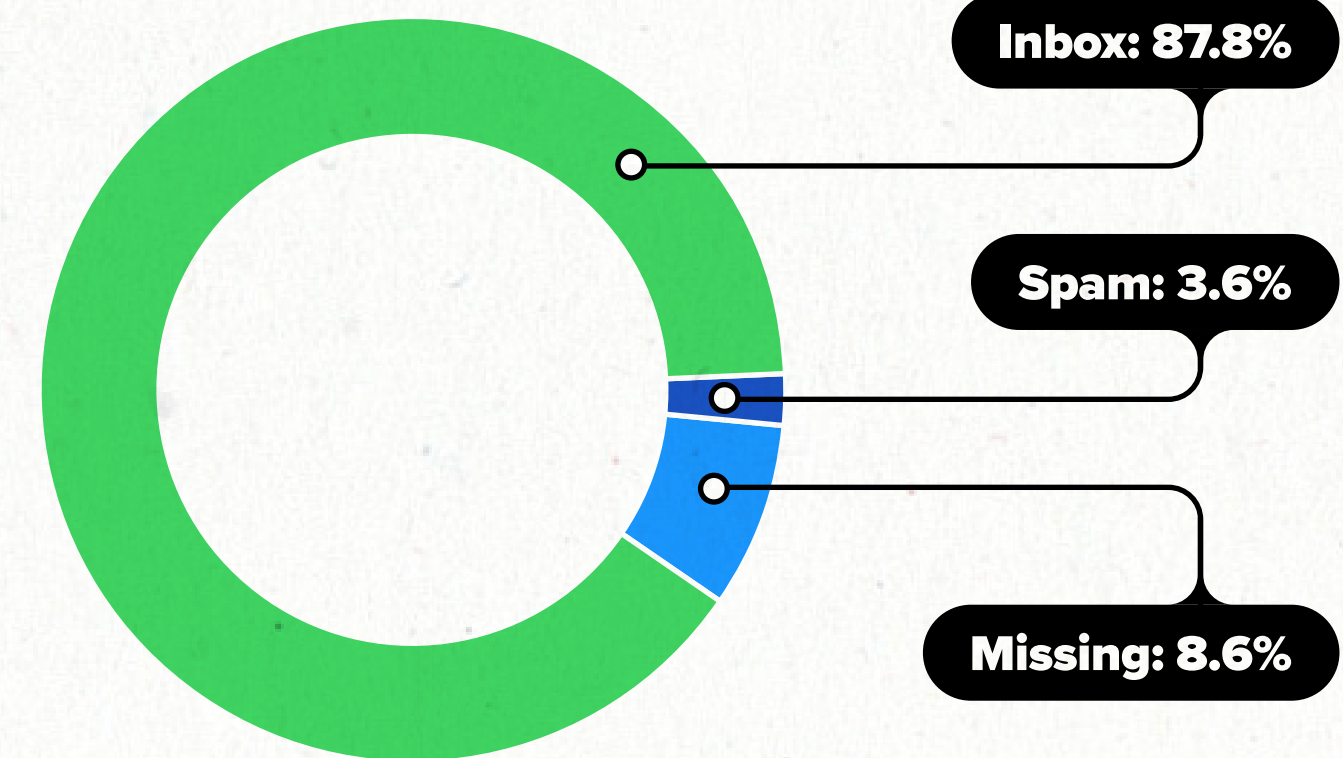
Yahoo’s performance is interesting. This MBP still operates many country-specific domains, and the split between yahoo.com and yahoo.co.uk is fairly even. We might expect deliverability to be identical for both, but we can see clear differences which could be attributable to slightly different demographics.

Another factor that could contribute to these differences is regulatory changes. The UK’s withdrawal from the European Union (“Brexit”) means it is no longer subject to GDPR. For now, it has implemented UK GDPR, which is nearly identical to the European version, but may diverge over time as new legislation passes.

FIGURE 19



Deliverability performance:
United Kingdom



Mailbox Provider	Market Share	Inbox %	Spam %	Missing %
Gmail	41.1%	91.8%	3.4%	4.8%
Microsoft	32.3%	86.9%	5.9%	7.1%
Yahoo/AOL	7.8%	90.2%	1.5%	8.3%
Yahoo UK	6.0%	88.9%	1.2%	9.8%
Apple	5.9%	88.5%	4.7%	6.8%

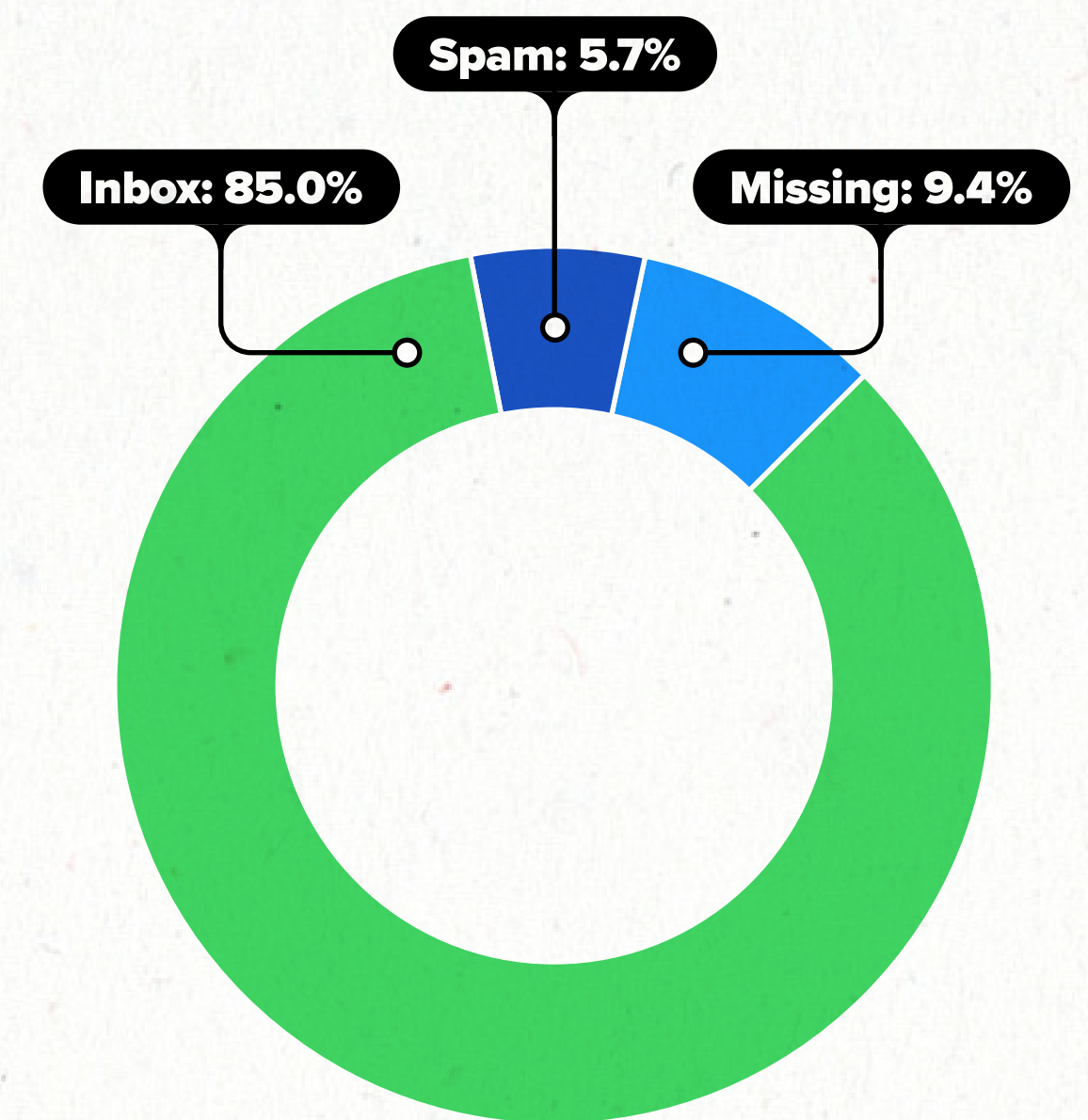
North America

Our North American data set consists of the United States, Canada, and Mexico. The region's average inbox placement rates show a slight decline since the previous edition of Validity's benchmark report, which reported average IPRs of 87.9 percent.

While this data is dominated by the US, it's interesting that Mexico performs extremely well, with average inbox placement rates of \pm 97 percent across the MAGY providers.

FIGURE 20

Deliverability performance:
North America



North America

United States

Gmail now accounts for more than half of the average US sender’s email list.

Despite the global decline in deliverability, Gmail managed to slightly improve its inbox placement in the US compared to our previous report (84.6 percent), which is an impressive feat.

This improvement coincides with the ongoing rollout of new privacy legislation across the US. In the absence of any overarching federal legislation, individual states are determining privacy requirements, and 19 states have now passed such laws. Looking at global trends, we’ve seen similar patterns with GDPR, LGPD, and other regulations, where stronger privacy protections often lead to better email performance.

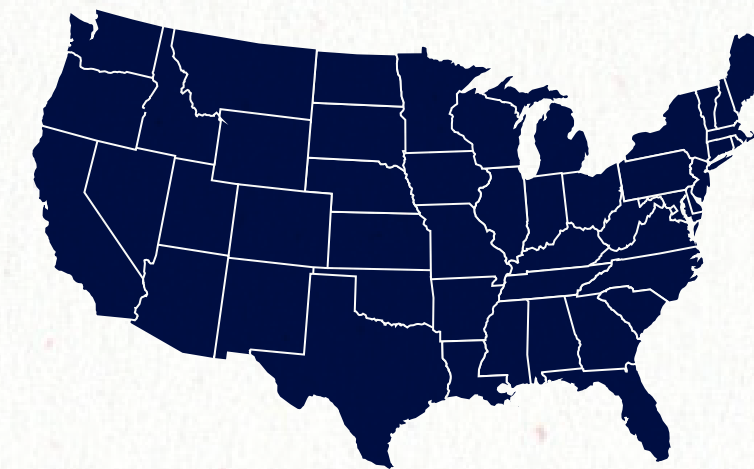
While CAN-SPAM remains the primary governing legislation for email marketing in the US, it still operates on an “opt-out” basis. This approach contrasts with countries like Australia, Canada, France, Germany, and the UK, all of which have stricter opt-in requirements. A comparison of inbox placement rates across these regions suggests that the US pays an “opt-out penalty” of six percent on average IPRs. Since industry research values the average revenue per email at \$0.11, this translates to an opportunity cost of around \$6,500 per million emails sent.

However, CAN-SPAM enforcement efforts are ramping up. In August 2024, security solutions company Verkada faced a record-breaking \$2.95 million fine

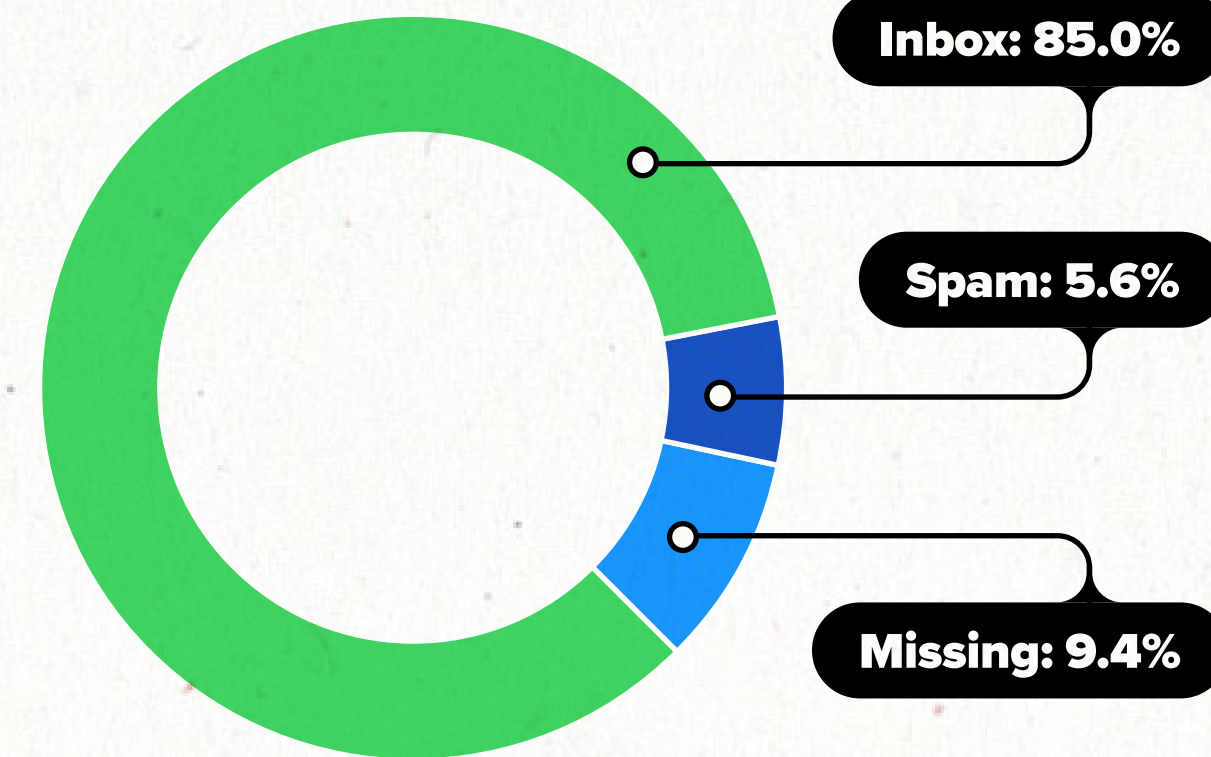
from the Federal Trade Commission for violating the law by sending unsolicited emails and mishandling personal data.

When reviewing the composition of regional MBPs, AT&T and Comcast together account for three-quarters of the US’s non-MAGY sending activity, with a combined inbox placement rate of 84.4 percent—slightly below the overall US benchmark. Notably, as of June 2024, Comcast (now rebranded as Xfinity) has stopped accepting new email subscribers. As a result, we can expect deliverability at this MBP to decline over time as its audience naturally shrinks.

FIGURE 21



Deliverability performance: United States



Mailbox Provider	Market Share	Inbox %	Spam %	Missing %
Gmail	54.4%	88.8%	5.8%	5.4%
Yahoo/AOL	21.8%	86.4%	4.7%	8.9%
Microsoft	10.8%	75.8%	14.8%	9.5%
Apple	4.1%	76.7%	14.5%	8.8%
AT&T	2.0%	87.2%	4.5%	8.2%

North America

Canada

Canada’s deliverability has declined slightly compared with Validity’s previous benchmark report (in which IPRs were reported at 90 percent). Microsoft still has a heavy weighting in Canada, so the 2024 decline will have influenced this trend.

Major Canadian MBPs include Shaw, Bell, Rogers, Videotron, and Teksavvy, which together cover most of the remaining non-MAGY percent of Canada’s email landscape. Average IPRs for these MBPs are only 84.1 percent, slightly below the country’s overall benchmark.

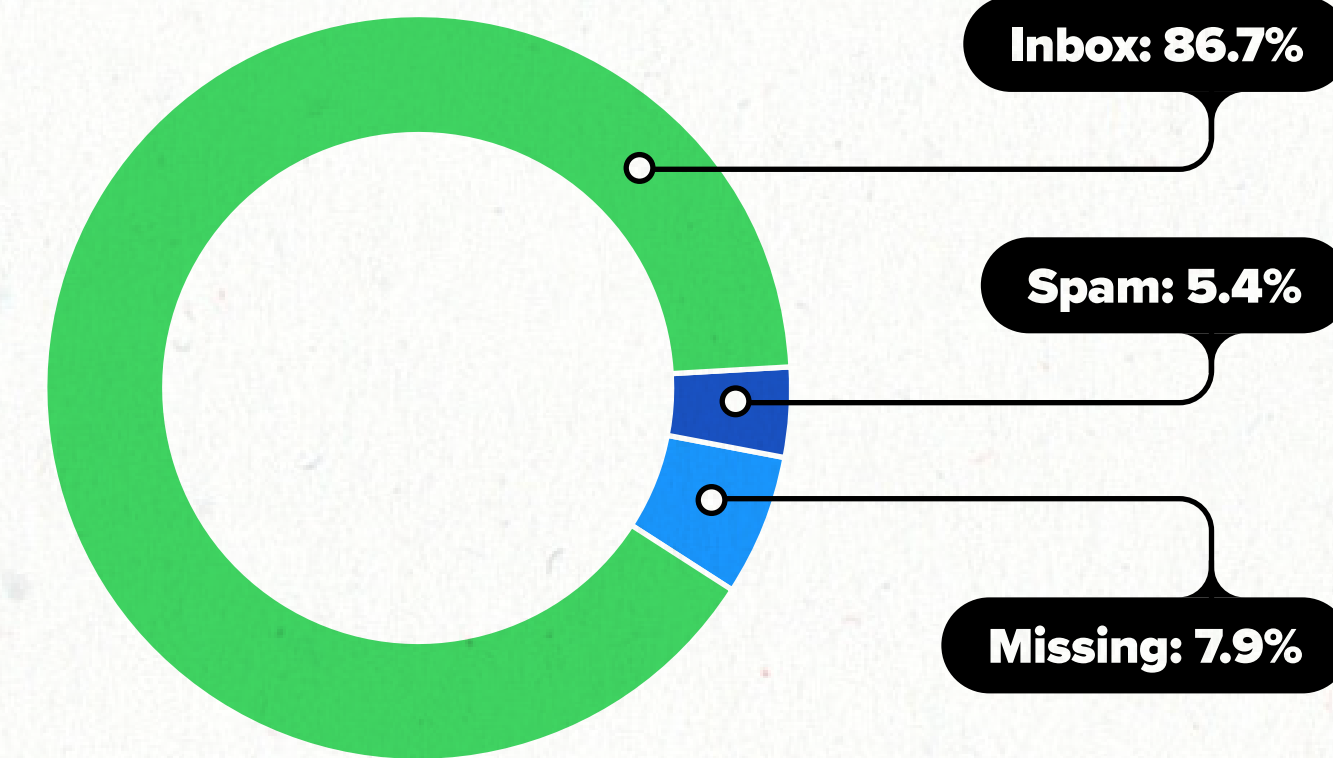
Why the decline? Canada is exploring stronger data protection measures, especially with the introduction of the [Digital Charter Implementation Act](#). This will potentially change how email marketers collect consent, manage email lists, and store subscriber data.

Political volatility may also affect Canadian deliverability. A potential change of government is imminent, and the political parties have different views on data and privacy (see above). Tariffs from across the border are also a threat, and a shift towards “support local” could have positive and negative impacts on subscriber engagement.

FIGURE 22



Deliverability performance:
Canada



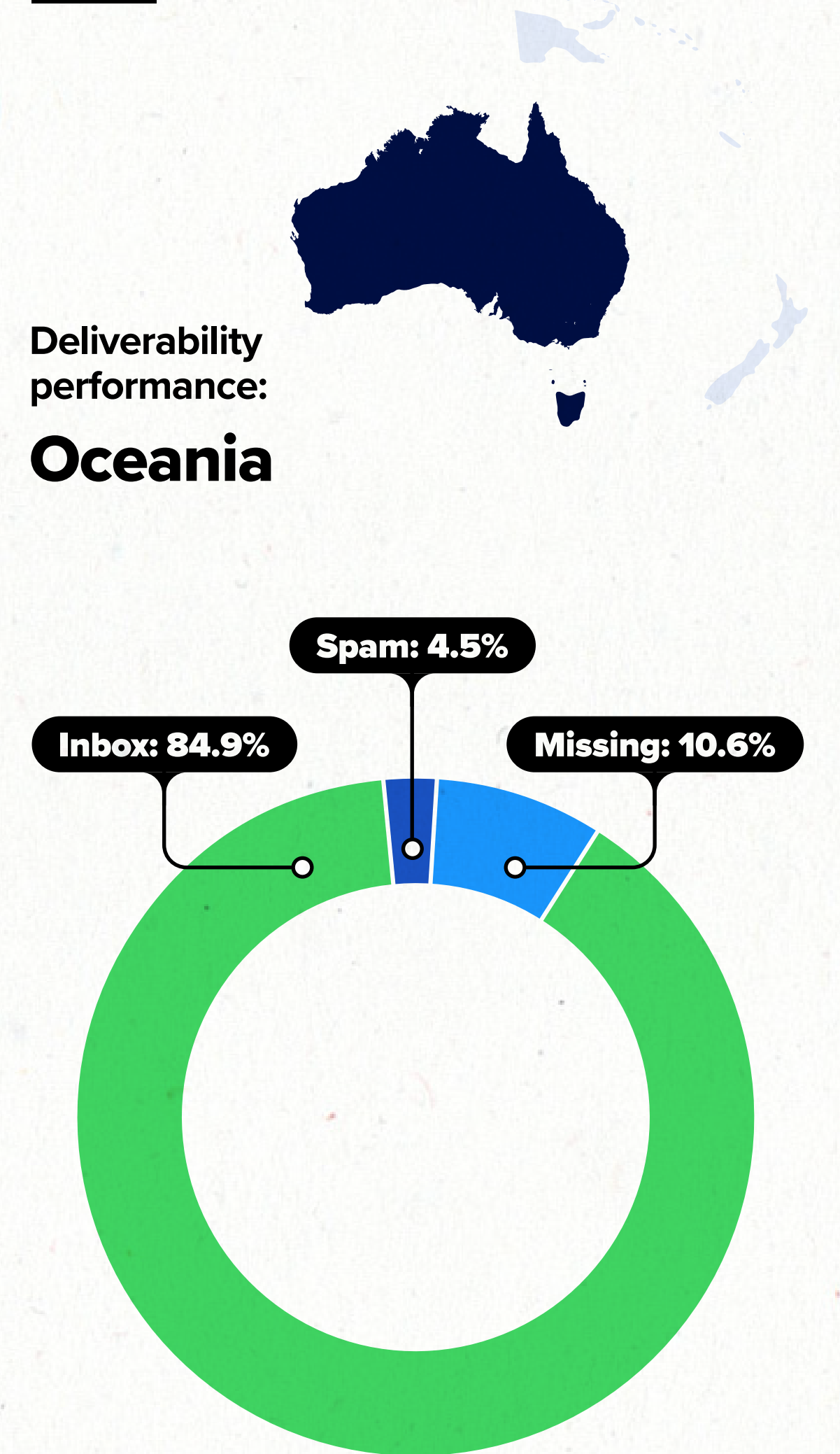
Mailbox Provider	Market Share	Inbox %	Spam %	Missing %
Gmail	45.5%	94.4%	3.7%	1.8%
Microsoft	27.9%	78.9%	10.6%	10.5%
Yahoo/AOL	12.2%	88.6%	1.4%	10.0%
Apple	5.3%	82.9%	9.2%	8.0%
Shaw	1.5%	91.8%	1.5%	6.7%

Oceania*

This Oceania region is formed primarily by senders based in Australia, New Zealand, and the Pacific Islands. It's interesting to observe the arch of this region's deliverability—strong in Q1, dipping in the middle of the year, then surging upward in Q4. In addition to Black Friday, the final quarter also includes other major regional events like Singles Day and Clickfrenzy.

*We did not treat Oceania as a separate region in Validity's previous benchmark report (it formed part of Asia Pacific), so we do not have a comparative benchmark.

FIGURE 23



Oceania

Australia

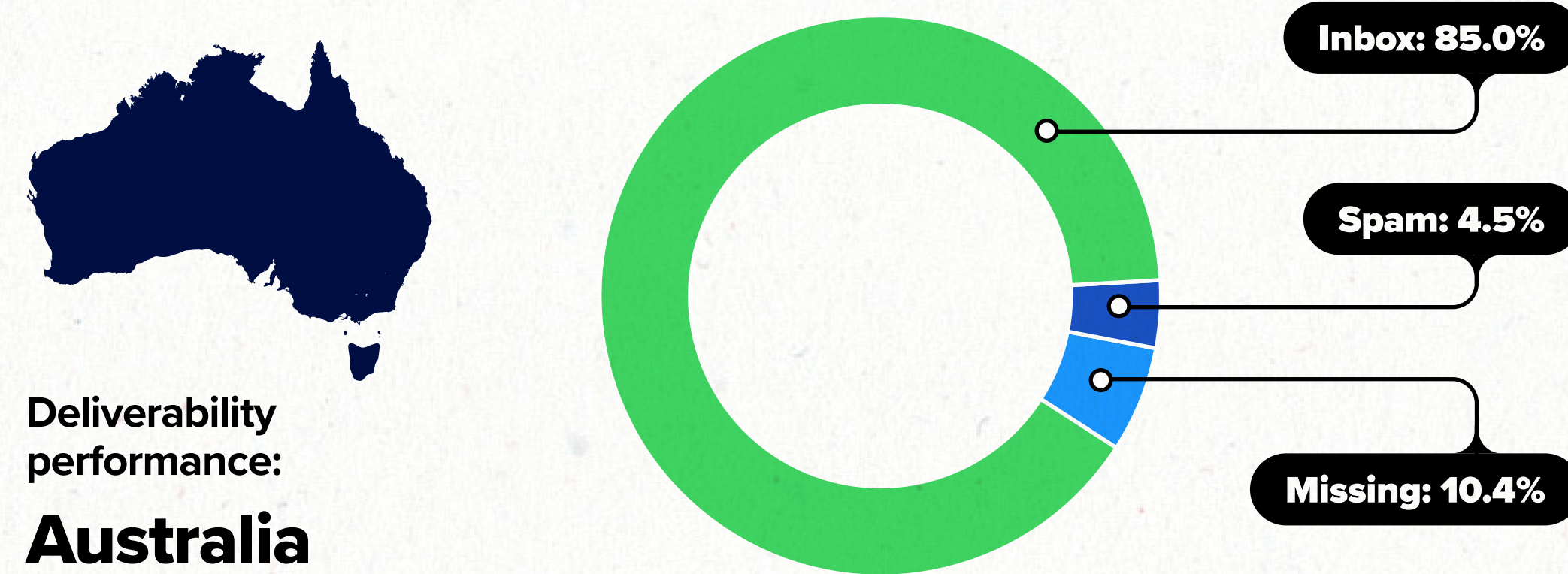
Australia’s inbox placement rates have dropped since Validity’s previous benchmark report (in which Validity reported them at 89.7 percent). This is largely due to the heavy Microsoft weighting—Microsoft inbox placement rates dropped sharply in 2024.

Significant local MBPs in this country include BigPond, iinet, Xtra, Optus, and TPG. Average inbox placement rates across these local providers during 2024 were only 75.2 percent.

BigPond implemented new spam-fighting solutions that have created stricter filtering rules for senders. This is on top of tough pre-existing connection and throughput settings.

The Message Company (owner of iinet, Optus, and TPG) posed a particular challenge for Australian senders in 2024. Mailbox owners were moved from free services to paid services, and those who didn’t want to move were deactivated. This created deliverability problems because of the high bounce rates caused by these newly inactive accounts.

FIGURE 24



Mailbox Provider	Market Share	Inbox %	Spam %	Missing %
Gmail	47.3%	92.6%	2.7%	4.7%
Microsoft	30.2%	77.7%	10.6%	11.7%
Yahoo/AOL	7.5%	86.4%	2.6%	11.0%
BigPond	5.9%	86.4%	0.1%	13.5%
Apple	3.8%	87.2%	6.1%	6.7%

South America

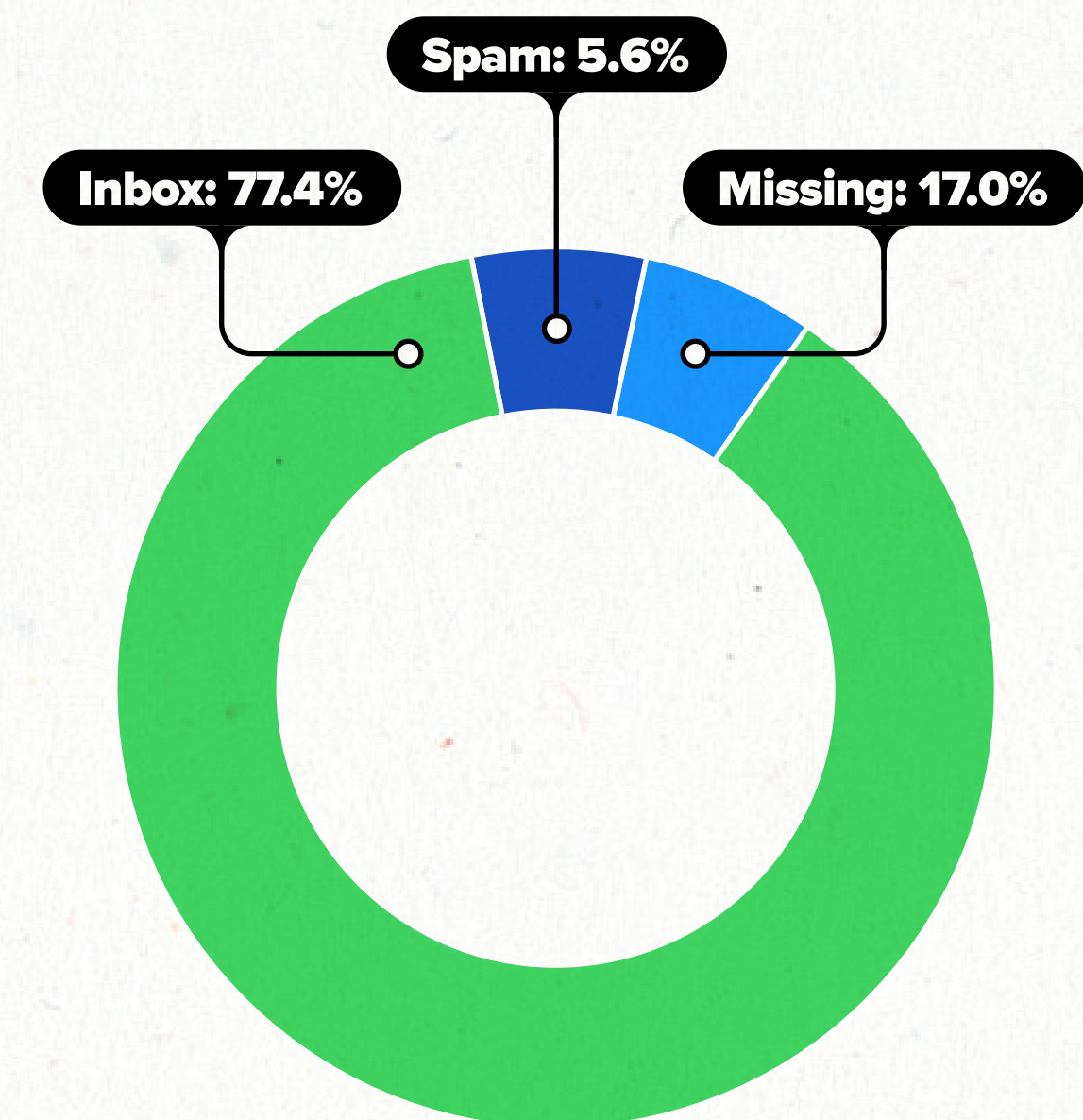
South America's average inbox placement rates have dropped by several percentage points since the previous edition of Validity's benchmark report (which reported an average IPR of 81.1 percent).

It's important to note that Brazil is the largest economy in South America, representing ± 60-65 percent of this region's total Gross Domestic Product (GDP). This makes it the dominant economic force in the region by a significant margin, but also means it exerts a significant effect on these deliverability metrics.

We'll examine some of the economic headwinds facing Brazil and their impact on marketing performance next.

FIGURE 25

Deliverability performance:
South America



South America
Brazil

Deliverability in Brazil has dropped significantly since Validity’s previous benchmark report (in which they were reported at 86.9 percent). The decline is consistent across all MBPs, suggesting a general reduction in subscriber engagement in Brazil.

Important local MBPs in this country include Terra, BOL (Brasil online), Fibertel, and Vera. The average inbox placement rate for these local providers is only 68.6 percent.

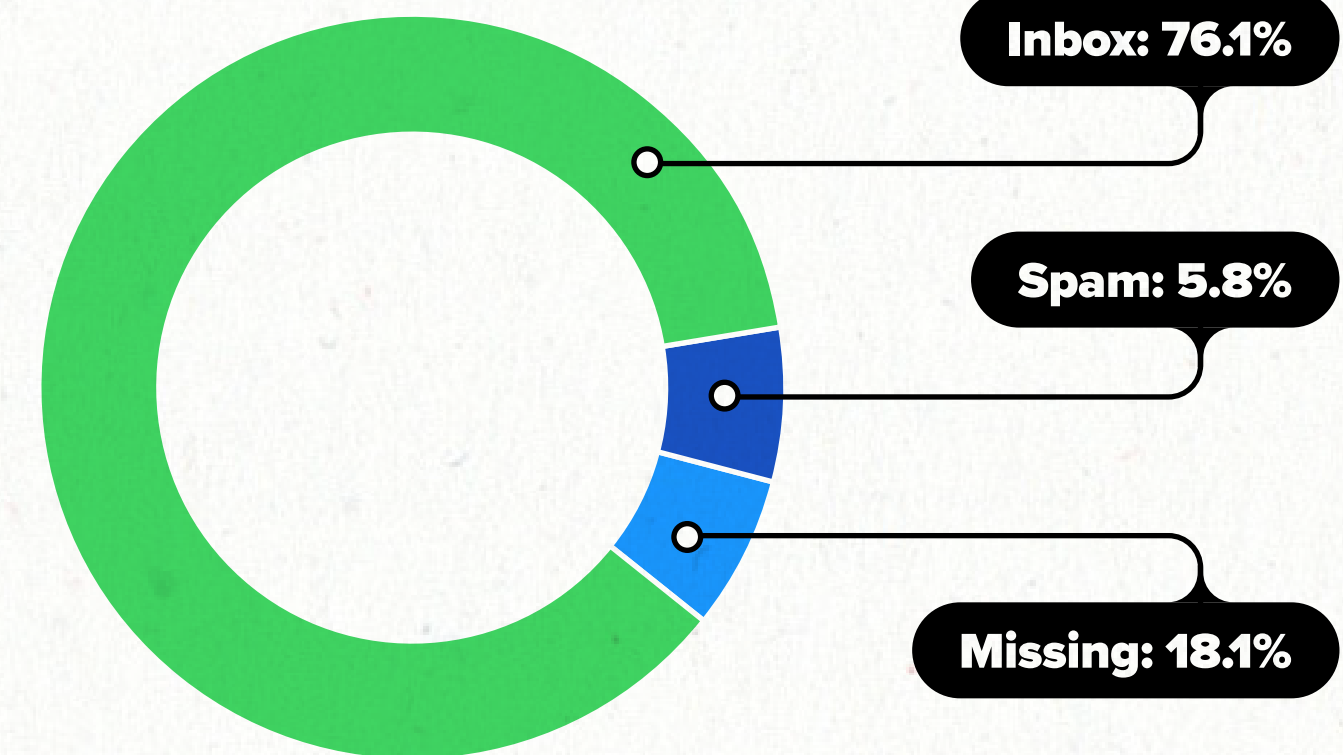
Brazil has faced severe economic pressure in recent years. The Brazilian Real declined by 33 percent against the US dollar in the past five years, placing additional pressure on MarTech investment.

In the past, Brazil was dominated by Hotmail. Now, three out of five emails are now sent to Gmail addresses. As we see with India, Apple’s market share is much smaller than in more developed markets, which highlights lower disposable income in these countries. Consumers in Brazil are far more likely to own lower-priced Android devices, which helps explain this rapid shift towards Gmail.

FIGURE 26



Deliverability performance:
Brazil



Mailbox Provider	Market Share	Inbox %	Spam %	Missing %
Gmail	59.8%	79.2%	7.4%	13.4%
Microsoft	24.5%	78.7%	3.3%	17.9%
Yahoo/AOL	5.6%	81.2%	2.5%	16.2%
Apple	1.9%	67.4%	8.8%	23.8%
Terra Brasil	0.6%	67.8%	2.4%	29.8%

B2B vs B2C deliverability

Email deliverability for B2B senders is often much harder than it is for their B2C counterparts. When it comes to subscriber acquisition, the bar for consent is typically set much lower, resulting in less engaged lists that generate lower sender reputation metrics.

B2B senders also have an additional hoop to jump through as they navigate spam filtering. While major hosting platforms typically have their own spam filtering capabilities, many businesses also use a third-party vendor to protect themselves against spam and malicious activity.

B2B hosting platforms

Office365 and Microsoft form over 90 percent of the email traffic sent by Validity's customers to hosted platforms. The good news is this simplifies the B2B deliverability challenge. There are really only two vendors to consider, and their filtering technology is similar to their B2C platforms.

We can see this similarity when we compare the average combined inbox placement for B2C/Microsoft and Gmail (84.2 percent) versus B2B/Office 365 and Google Apps (83.6 percent).

One important difference is that administrators can also define their own custom rules, which are usually stricter than the "default" filter settings. This contributes to the difference (albeit a small one) between the two environments.

Other hosting platform vendors we monitor include Rackspace, Amazon Workmail, Hover, Zoho, Network Solutions, Inbox.lv, and Gandi. The average inbox placement rate across these vendors is lower at 80.8 percent, and missing rates are noticeably higher at 15.7 percent.

Hosting Platform	Market Share	Inbox %	Spam %	Missing %
Office 365	61.4%	85.2%	3.1%	11.7%
Google Apps	35.4%	83.1%	5.9%	11.1%

Filtering companies

These four vendors represent over 90 percent of the email traffic sent by Validity customers to filtering solutions. Proofpoint alone represents just over half of this traffic, and their own [research](#) states they are used by \pm 75 percent of US's Fortune 100 companies.

Note that Proofpoint also owns and operates both [Cloudmark](#) and the [Proofpoint blocklist](#), which are two other influential players in the email deliverability space.

Proofpoint operates a very complex scoring system, taking a multilayered approach (e.g., IPs, domains, hostnames, DNS, etc.) Customers can also submit feedback. Emails need to pass all these tests, and Proofpoint's overarching guidance is simply to avoid looking spam/scam-like.

Learn more from Proofpoint's [sender guidelines](#), Validity's [Knowledge Center](#), or Proofpoint's recent [appearance](#) on State of Email Live.

Other filtering companies we monitor include Symantec, Sophos, SpamExperts, Vade Secure, and Virusfree. The average inbox placement rate across these vendors is lower at 81.9 percent, and missing rates are noticeably higher at 16.1 percent.

Filtering Company	Market Share	Inbox %	Spam %	Missing %
Proofpoint	50.4%	84.2%	4.4%	11.4%
Mimecast	21.1%	88.7%	0.0%	11.3%
Cisco	12.1%	88.3%	1.8%	10.0%
Barracuda	10.0%	77.2%	0.0%	22.8%

Deliverability by industry

Figure 27 shows a breakdown of key deliverability metrics across 23 major industries. We'll explore a few in more detail next.

FIGURE 27

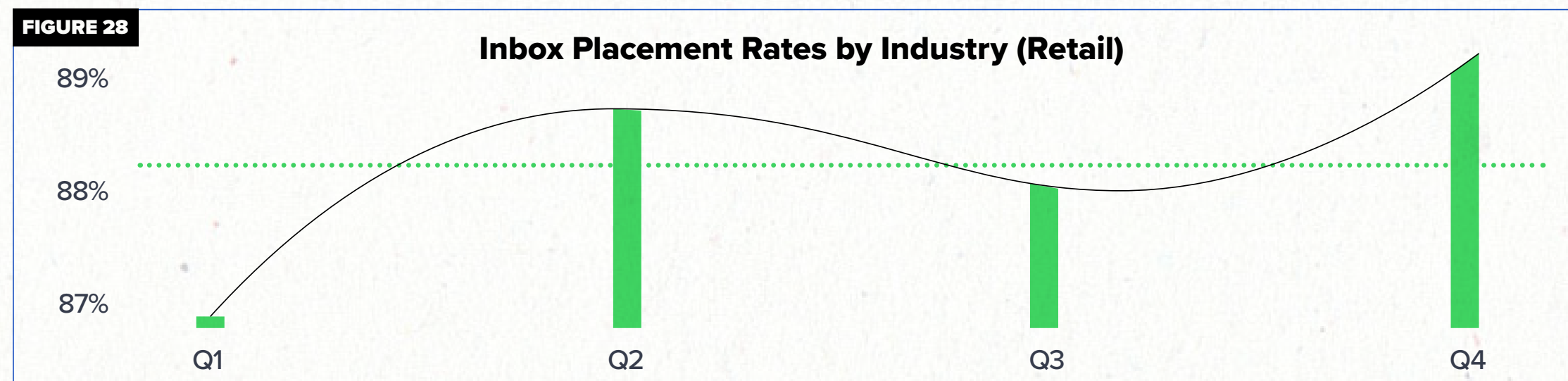
Sector	Inbox	Spam	Missing
Minerals & Mining	98.0%	1.7%	0.3%
Government	96.3%	2.9%	0.8%
Hospitals & Physicians Clinics	94.7%	4.5%	0.9%
Construction	93.4%	4.5%	2.1%
Holding Companies & Conglomerates	91.2%	2.6%	6.2%
Telecommunications	88.9%	5.0%	6.0%
Transportation	88.8%	3.1%	8.1%
Retail	87.6%	4.3%	8.1%
Law Firms & Legal Services	87.3%	4.7%	8.0%
Finance	87.3%	6.2%	6.6%
Organizations	87.0%	5.7%	7.2%
Energy, Utilities & Waste	86.8%	4.8%	8.4%
Insurance	86.7%	5.0%	8.3%
Media & Internet	86.5%	6.4%	7.0%
Hospitality	85.8%	8.1%	6.1%
Education	84.9%	10.6%	4.5%
Consumer Services	83.7%	8.5%	7.8%
Real Estate	83.3%	11.6%	5.1%
Manufacturing	82.2%	7.8%	10.0%
Software	80.9%	10.6%	8.4%
Healthcare Services	78.7%	10.5%	10.8%
Business Services	76.7%	8.4%	15.0%
Agriculture	59.8%	36.4%	3.8%

Retail

Inbox placement rates in this sector remain near-identical to those quoted in Validity’s previous benchmark report (87.7 percent).

Interestingly, retail senders bucked the 2024 trend, and inbox placement rates *improved* across the year. As a whole, retailers moved quickly to implement the new bulk sender requirements and

saw consequent deliverability benefits. The sector is also proving to be an early adopter of new AI-influenced marketing technology. Many of Validity’s biggest retail customers are also Sender Certification customers and benefit from their trusted sender status, especially during high-volume periods like the holidays.



Learn more about some of Validity’s biggest retail success stories here:

Shutterfly Achieves a 20% Inbox Placement Rate Uplift with Validity.

Princess Polly Drives a 32% Revenue Increase with Validity.

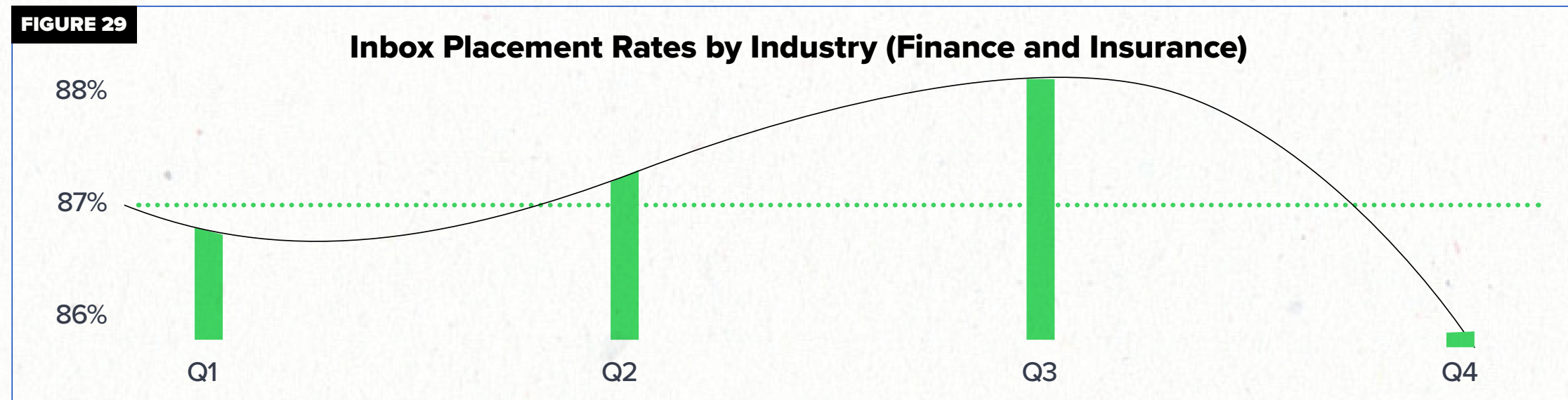
BrandAlley Reaches an Additional 100M Inboxes Per Year with Validity.

Finance and Insurance

We previously categorized these sectors together as Financial Services. Both have significantly improved since Validity's previous benchmark report (which reported IPRs for this industry at 80 percent).

These sectors have almost certainly benefitted from the push to implement more robust authentication, including DMARC. Finance has always been

particularly susceptible to email fraud, but as fraud becomes harder to execute, trust in messages from this sector is increasing. Note how deliverability declines in Q4, illustrating how even programs that aren't heavily involved with Black Friday promotions still get caught up in the broader deliverability challenge posed by this high-volume period.



Learn more about some of Validity's biggest finance success stories here:

[Binance Achieves a Multi-million-Dollar Revenue Uplift with Validity](#)

Hospitality

This sector includes both the travel and dining categories. There has been a significant drop in inbox placement rates since Validity's previous deliverability benchmark report (reported at 94.5 percent).

When we prepared Validity's previous benchmark report, much of the world was emerging from COVID-19 lockdowns and hungry to catch up on missed travel experiences. Today, tough economic conditions mean that programs highly dependent on discretionary spending (like hospitality) have had to work far harder to achieve great deliverability.

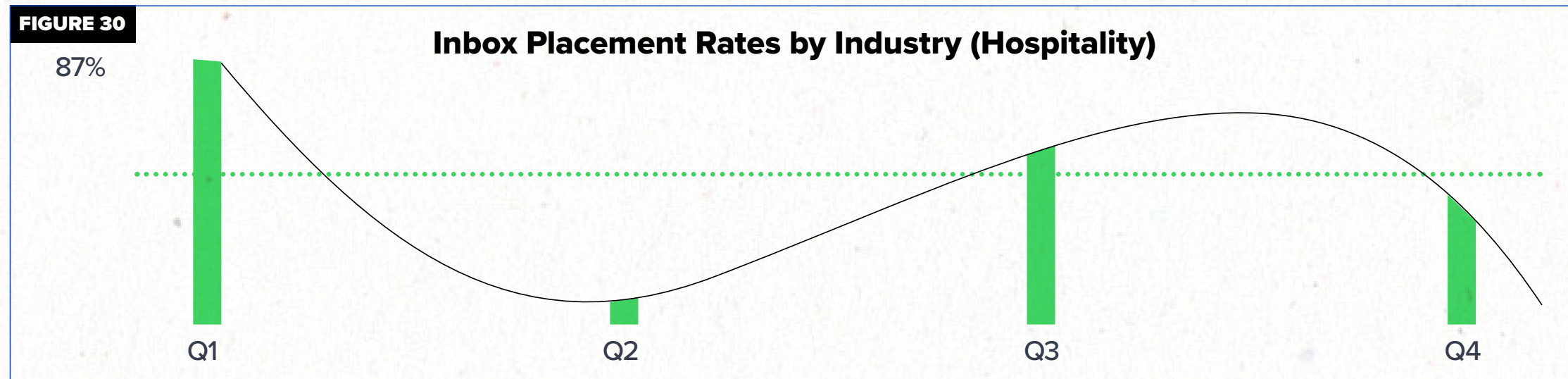


Learn more about some of Validity's biggest travel and hospitality success stories here:

Southwest Airlines Achieves First-Class Email Deliverability with Validity

Expedia Achieves a Sender Score of 99 and a 100% Inbox Placement Rate with Validity

Virgin Atlantic Airways Soars to 100% Inbox Placement Rate with Validity

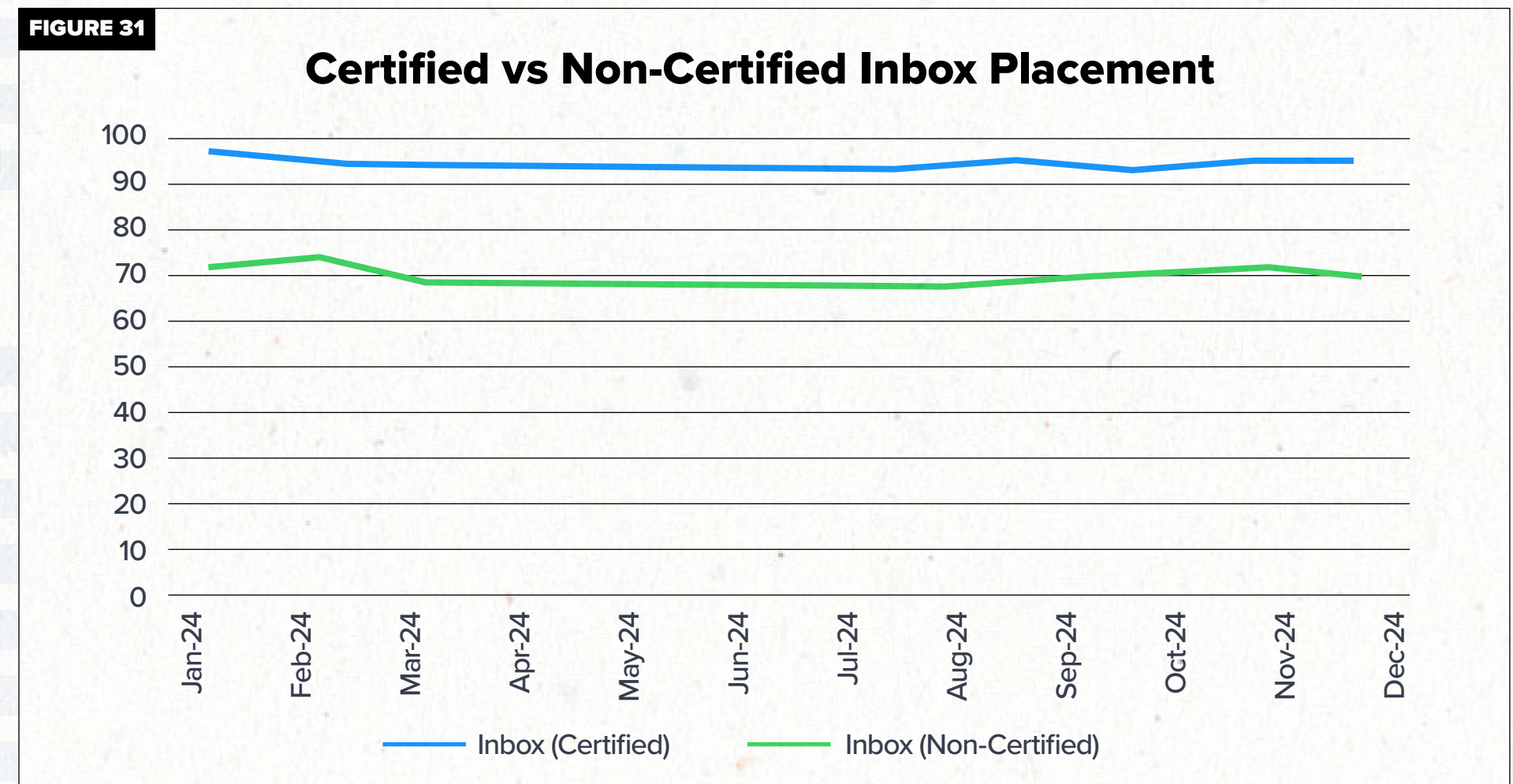


The Sender Certified advantage

Validity's global [Sender Certification program](#) provides accredited senders with a significant inbox placement advantage at over 80 global mailbox providers and spam filter vendors. These senders enjoy trusted sender status with these "email gatekeepers," meaning they benefit from faster throughput, lower levels of spam/junk placement, and reduced risk of blocking or rejection.

We analyzed the data used for this report, splitting it out by Validity customers who also use Sender Certification compared with those who don't.

One aspect that stands out is how the benefit increases during high-volume periods such as the Q4 peak sale season. At these times, even the biggest MBPs struggle with processing resources, which impacts factors such as mail flow, data storage, and client synching. When this happens, they will prioritize higher reputation senders, helping maximize the Certified benefit.



Period	Q1	Q2	Q3	Q4	Full year
Benefit	2.5%	8.9%	4.8%	15.2%	7.9%

Top 14 deliverability tips for 2025

Based on the learnings from this report, these top recommendations should form part of your email roadmap for 2025. Addressing these points proactively will help future-proof programs today, rather than forcing senders to scramble when the next big developments (inevitably) happen.

1

Upgrade DMARC policies to Quarantine/Reject

While there was a 70 percent increase in the use of DMARC authentication across Q1 2024, over 90 percent of new adopters introduced DMARC with a policy of “None.” Fraudsters have already identified this approach as a weakness, focusing their phishing and spoofing efforts on these programs. It will only be a matter of time before Gmail and Yahoo make p=quarantine/reject a mandatory requirement, and senders should introduce stronger alternatives now to stay ahead of the curve.

2

Keep spam complaint rates below 0.1 percent

Gmail and Yahoo’s current spam complaints threshold (0.3 percent) is extremely generous. Yahoo has told us any program generating this level of complaints will already be encountering deliverability issues. Best-in-class senders should aim for an average spam complaint rate that is consistently below 0.1 percent. It’s only a matter of time before bulk sender requirements tighten to mandate this lower number.

3

Implement double opt-in permissioning

MBP sender guidelines often provide clues about what’s coming next—today’s best practices have a habit of becoming tomorrow’s mandates. Gmail, Yahoo, and Apple all strongly recommend the use of double opt-in (DOI)—where an activation link in the sign-up confirmation email must be clicked—as their preferred permissioning mechanism. This isn’t a bad thing. Senders will benefit because DOI builds healthier, more engaged lists that generate more revenue.

4 Protect your sign-up forms against bot attacks

We are seeing increased denial-of-service-style bot attacks that generate thousands of fake sign-ups for email programs. The increased bounces and complaints generated can have a devastating impact on sender reputation, inbox placement, and the potential for blocklistings. Senders need to have a comprehensive strategy in place for dealing with these attacks. This should start with double opt-in mechanisms but also include tactics like email address verification, limiting the rate at which new addresses can be entered, CAPTCHA tests, and the use of additional security questions.

6 Prepare for new AI legislation

The [European Union's AI Act](#) came into force in August 2024, creating a comprehensive legal framework for AI use. Many other countries are now developing similar AI regulations. To prepare, email marketers need to re-visit several important aspects of their programs, including their legal basis for personal data processing, the risk level their AI use creates, updates to privacy policies and user preferences, and the ongoing practice of data minimization (i.e., only collecting data they'll actually use).

5 Implement Gmail annotations

A few years ago, Gmail introduced Annotations, letting marketers include a schema that exposes snippets or images *in the inbox*, meaning subscribers can respond without opening the email. Perhaps frustrated by slow adoption, Gmail is now using AI to auto-insert annotations schemas into emails not already using it. Sometimes the results are helpful—exposing an “expires tomorrow” snippet may create additional urgency to shop. However, highlighting offers that already expired will create additional spam complaints. Senders should implement annotations if they haven't already, so they have full control over what is shown in the promotions tab.

7 Re-visit email accessibility

While most marketers understand the importance of accessibility, [research](#) from the Email Markup Consortium shows over 90 percent of marketing emails still contain “critical” or “serious” issues that exclude disabled customers. This exclusion means reduced engagement for these subscribers and increased spam complaints—which hurt deliverability. Simple accessibility wins for all senders include adding meaningful alt text for images, placing greater focus on color contrast, increased use of semantic HTML, using easy-to-read fonts, and adding dark mode compatibility.

8 Anticipate AI-generated summaries

Marketers have become adept at using preheader text to complement their subject lines. The launch of AI summaries means preview text will be replaced by AI-generated summaries—often of mixed quality, and (occasionally) completely misrepresenting the email’s content. Tactics to help senders mitigate these risks include crafting “standalone” subject lines, creating “conversational” emails that readers will understand, adoption of SEO principles to ensure the right content is found, and use of descriptive “friendly froms” (e.g., “Validity Webinars” instead of “Validity”).

9 Avoid top-of-hour sends

Our MBP partners tell us they see a massive spike in email traffic during the first minute of every hour from bulk sends scheduled to start at the top of the hour (e.g., at 9 AM). This creates capacity utilization issues that impact mail flow, data storage, and client syncing. Whenever this happens, more emails get throttled, placed in spam/junk, and blocked or rejected. Senders who offset the start time of their broadcasts will have less competition and will be far more likely to reach their customers’ inboxes.

10 Delete the dormant

With both Gmail and Yahoo actively deleting dormant accounts, it’s essential to not send emails to these deleted addresses. This will result in increased unknown user rates, negatively impacting sender reputation and hurting deliverability. Especially for these MBPs (but also as a good general rule of thumb) tighten up recency rules to exclude subscribers who have not engaged with emails for 12 months or more.

11 Prioritize AI spam education

A downside of the AI revolution is that scammers are using it to up their game, too! Marketers are responsible for educating their customers about a whole new range of clues that may indicate things aren’t quite what they seem. Poor spelling and grammar seen in emails used to be a giveaway, but now it’s almost exactly the opposite. Readers also need to watch out for things like the use of generic greetings, and inconsistency in tone, style, and vocabulary. Look closely at images too, for objects that don’t cast shadows, no reflections on windows and mirrors, etc.

12 Get recognized

After strengthening their DMARC records, senders should implement Brand Indicators for Message Identification (BIMI), which shows their authorized logos next to their emails in subscribers' inboxes. This aligns with the previous tip—the use of a trusted logo and the blue checkmark will reassure recipients that the email comes from a trusted sender. Apple recently launched Apple Branded Mail, which makes similar functionality available to business users. Senders should make their customers aware that these indicators provide additional reassurance that the emails are of secure provenance and can be trusted.

14 Pull the trigger

There used to be a rule of thumb that by the time triggered campaigns formed five percent of an email program's total sending volume, they would contribute 50 percent of its revenue. More recently, we've seen research showing automations accounting for two percent of send volume are delivering [37 percent](#) of all email sales (see this recent report). One of email's biggest challenges is inbox overload, and email programs need to work smarter, not harder. Replace bulk sends to inactive subscribers with automated lifecycles and drive big revenue uplifts for a “less is more” strategy.

13 Cut out the complaints

Ensure all complaints are treated the same way as opt-out requests and suppress these accounts from receiving future emails. Additionally, make sure your program is signed up to receive feedback data from the likes of Outlook and Yahoo, as well as Validity's Universal feedback loop, which covers multiple MBPs as one service. For senders who have already implemented the Gmail Spam Feedback Loop (FBL), ensure you're also receiving feedback loop identifiers which allow you to drill down to campaign level, or individual message types.

Conclusion

In today's email landscape, even senders who follow best practices can't afford to assume their messages are reaching the inbox.

A trusted technology partner like Validity helps ensure your emails land where they belong—before you hit send.

[Validity Everest](#), the market-leading email deliverability platform, provides unmatched insights and expert guidance to help senders maximize inbox placement and boost engagement.

[Validity BriteVerify](#), the industry's most trusted contact verification solution, ensures every campaign starts with a clean, high-quality list.

For an added layer of protection, Validity [Sender Certification](#) helps senders establish a trusted reputation with mailbox providers, improving deliverability and reducing the risk of emails being filtered as spam.

To learn how Validity can help you reach more inboxes and achieve record-breaking campaign performance, schedule a demo with our email experts today.

[Schedule a demo](#)

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 Everest's 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 Everest users may see different numbers when they view their community reporting.



For over 20 years, tens of thousands of organizations throughout the world have relied on Validity solutions to target, contact, engage, and keep customers – using trustworthy data as a key advantage. The Validity flagship products – DemandTools, BriteVerify, Everest, GridBuddy Connect, and MailCharts – are all highly rated solutions for CRM data management, email address verification, inbox deliverability and avoiding the spam folder, and grid CRM applications. These solutions deliver smarter campaigns, more qualified leads, more productive sales, and ultimately faster growth. For more information, visit [Validity.com](https://validity.com) and connect with us on [LinkedIn](#) and [X](#).

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sales@validity.com

