



July – December 2010
Email Marketing Metrics Report
Australia



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About the author

Vision6 is an Australian owned and run company, founded in 2001 by friends and colleagues Evan Fortune and Mathew Myers.

Together they identified that marketing professionals needed an easier way to create, send and track email messages; and to integrate e-messaging into the marketing mix. As a result the duo formed Vision6.

Today we have grown to become a team of more than 30 developers and professionals and are passionate about all things e-messaging.

We empower thousands of businesses to achieve great marketing results with our e-messaging platform. It brings together a mix of database, email, mobile and social media messaging tools in an easy-to-use system.

We actively contribute to the marketing community by writing whitepapers, providing free training and producing the Email Marketing Metrics Report.

We're also the organisers of Australia's only email marketing summit (EMSA) and are always on the lookout for new ways to make our clients happy.

Contact Vision6 for a **FREE 30 DAY TRIAL**

ground floor 47 warner street fortitude valley qld 4006 australia

e contact_us@vision6.com.au p +61 7 3257 3906 f +61 7 3257 3907

w www.vision6.com.au/free-trial

Overview

This report is the ninth in a series of reports produced by Vision6 every six months on the Australian email marketing landscape.

This report aims to:

1. Help marketers gauge and improve their email marketing results by providing comparative benchmarks.
2. Uncover trends, provide observations and identify factors that could have the biggest impact on the success of your email campaigns.

Data Source

This report includes data from over 253 million messages which were distributed via 181,472 sends by predominantly Australian based companies during the second six months of 2010.

We have excluded campaigns with less than five email addresses to minimise data distortion. We also excluded all emails sent by our stand alone resellers and corporate networks.

WHAT WOULD YOU LIKE TO SEE IN FUTURE REPORTS?

We are always looking at ways to improve the Email Marketing Report Australia. So, if you have any new statistics you'd like to see in this report contact us at contact_us@vision6.com.au.

What is included in this report?

To make this data as useful as possible to professionals implementing email marketing, we have focused on a number of key metrics that are both informative and useful, including:

Open Rate	General, Industry, Send Volume Categories
Click Through Rate	General, Industry, Send Volume Categories, Relative to Open
Industry	Open, CTRs, Send Volume Categories
Domain	Open, CTRs, Industry
By Day	Open, CTRs
By Hour	Open
Bounce & Deliverability	General, Industry
Email Clients	Used to open

Although we cannot promise to include everything, we will do our best to include your suggestions where possible.

(In this report we've added in some new statistics on page 22.)

Key Findings Summary

Measurement	2007 H2	2008 H1	2008 H2	2009 H1	2009 H2	2010 H1	2010 H2
Overall Open Rate	20.24%	20.99%	22.52%	23.73%	25.16%	23.48%	22.34%
Open Rate By Send Volume	5-499: 35.41% 500-999: 31.65% 1,000+: 19.64%	5-499: 34.66% 500-999: 31.38% 1,000+: 20.16%	5-499: 34.36% 500-999: 31.04% 1,000+: 21.95%	5-499: 34.62% 500-999: 31.68% 1,000+: 23.22%	5-499: 34.96% 500-999: 31.49% 1,000+: 24.74%	5-499: 34.24% 500-999: 30.30% 1,000+: 22.98%	5-499: 34.27% 500-999: 30.56% 1,000+: 21.73%
Top 3 Industries with Highest Open Rates	Insurance/Super Real Estate & Property Manufacturing Ops.	Govt./Defence Accounting Manufacturing Ops.	Govt./Defence Accounting Call Centre/Cust Serv	Govt./Defence Primary Industry Accounting	Govt./Defence Mining/Oil/Gas Primary Industry	Mining/Oil/Gas Legal Govt./Defence	Mining/Oil/Gas Govt./Defence Transport/ Logistics
Overall Click Through Rate	4.16%	4.45%	4.81%	4.59%	5.46%	4.77%	4.67%
Click Through Rate By Send Volume	5-499: 8.11% 500-999: 6.67% 1,000+: 3.95%	5-499: 8.8% 500-999: 7.4% 1,000+: 4.2%	5-499: 8.82% 500-999: 7.34% 1,000+: 4.63%	5-499: 8.87% 500-999: 7.86% 1,000+: 4.39%	5-499: 8.86% 500-999: 7.74% 1,000+: 5.32%	5-499: 8.54% 500-999: 7.70% 1,000+: 4.59%	5-499: 8.26% 500-999: 6.60% 1,000+: 4.51%
Top 3 Industries with Highest Click Through Rates	Primary Industry Manufacturing Ops. Govt./Defence	Govt./Defence Manufacturing Ops. Engineering	Call Centre/Cust Serv Govt./Defence Primary Industry	Call Centre/Cust Serv Mining/Oil/Gas Primary Industry	Mining/Oil/Gas Call Centre/Cust Serv Accounting	Call Centre/Cust Serv Mining/Oil/Gas Govt./Defence	Transport/ Logistics Call Centre/Cust Serv Govt./Defence
Click Through Rate Relative to Open Rates	20.31%	21.22%	21.37%	19.34%	21.72%	20.34%	20.92%
Overall Bounce Rates	10.23%	10.34%	8.90%	7.22%	6.29%	5.75%	5.77%
Bounce Rates by Send Volume	5-499: 7.07% 500-999: 8.03% 1,000+: 10.41%	5-499: 7.29% 500-999: 8.09% 1,000+: 10.52%	5-499: 7.25% 500-999: 7.68% 1,000+: 8.98%	5-499: 6.82% 500-999: 6.94% 1,000+: 7.24%	5-499: 6.52% 500-999: 6.77% 1,000+: 6.27%	5-499: 6.10% 500-999: 6.19% 1,000+: 5.73%	5-499: 5.89% 500-999: 6.19% 1,000+: 5.75%
Top 3 Industries with Lowest Bounce Rates	Community & Sport Legal Science & Technology	Community & Sport Legal Science & Technology	Legal Call Centre/Cust Serv Mining/Oil/Gas	Legal Call Centre/Cust Serv Mining/Oil/Gas	Legal Accounting Call Centre/Cust Serv	Accounting Call Centre/Cust Serv Legal	Administration Call Centre/Cust Serv Transport/ Logistics
Most Popular Day for Email Sends	Friday	Friday	Friday	Wednesday	Wednesday	Thursday	Thursday

Our Observations and Interpretations

Summary Findings

1. Small recipient lists continue to outperform large recipient lists.
2. Bounce rates have steadied following a long period of decline.
3. People use a variety of email clients to read emails, including mobile devices.

1. *Small recipient lists continue to outperform large recipient lists.*

Finding

The data in this metrics report reinforces a noticeable trend observed since 2007. That is, emails sent to under 1000 recipients achieve higher open rates and click through rates compared to emails sent to over 1000 recipients.

Although H2 2010 reports a second and consecutive decline in overall open rates, the open rates by send volumes have remained steady (and have actually reported small increases) for emails sent to less than 1000 recipients.

Why

It is common belief that focusing on the needs of the few is easier than it is the needs of the many. Therefore, when building their email campaigns, email marketers who focus on smaller groups of subscribers are able to deliver content that is more relevant to their subscriber's needs, and therefore generate better responses.

What it means to you

Irrespective of your database size, your open rates are heavily influenced by the relevancy of your campaigns. Whilst it may be easier to deliver relevant campaigns when focusing on a small list of recipients, relevancy is something all email marketers should strive for.

To help improve your own open and click through rates, begin by focusing on your subscribers and ensure you always deliver content that is valuable, timely and interesting. Your emails should communicate a clear message to recipients and offer something of value, whether it be something they'll gain access to (promotional), learn from (educational) or find interesting (relational).

Our Observations and Interpretations (cont.)

2. Bounce rates have steadied following a long period of decline.

Finding

Since a reported bounce rate of 10.34% in H1 2008, we've since seen consistent and significant declines in reported bounce rates over each metrics report. This appears to have now settled with H2 2010 reporting a bounce rate of 5.77%.

Why

Quite simply, email marketers have gotten better at maintaining clean and up-to-date databases. Now more than ever, email marketers understand the importance of maintaining a clean and up-to-date database not only for cost benefits, but for improved deliverability.

Coinciding with this greater level of awareness, more email marketers have turned towards automated bounce management features such as those offered by Vision6 that make it easier to maintain databases.

What it means to you

Given the dynamic nature of email user information, you can always expect some degree of bounced emails in your campaign reports. This can't be avoided as people change their email addresses over time and sometimes simply mistype them when subscribing.

However, you should be maintaining a clean and up-to-date database as a matter of standard practice. If you're experiencing bounce rates significantly higher than 5.77% then take this as a sign that you need to clean up your database.

In addition to removing permanent bounces from your database after each email campaign, you can easily maintain a clean and up-to-date database by including an update profile option in each of your email campaigns. If you have new subscribers joining your database with invalid email addresses, use Vision6's auto-responder feature to apply a double opt-in process that confirms the validity of their email address.

Our Observations and Interpretations (cont.)

3. People use a variety of email clients to read emails, including mobile devices.

Finding

For the first time this report includes information on the specific email clients people are using to read their emails. The most popular email client people used in H2 2010 was Outlook 2003 with 23.80%. Second was Hotmail with 16.52%, followed closely by Outlook 2007 with 14.64%. (See page 22.)

Although it is the first time this information is being reported, it's also worth noting that over 10% of opened emails were read on mobile devices (iPhone 9.32% and iPad 1.34%). With the increasing popularity of mobile devices, it is reasonable to expect this figure to rise in the future.

Why

Consumer and business email users both utilise a variety of email clients to read their emails. The popularity of Outlook is consistent with its preference for use by businesses, as Hotmail is for consumers.

What it means to you

Email clients such as Outlook, Hotmail and Gmail all have different ways of handling your email. This means your email may look different when viewed in Outlook than it does when viewed in Hotmail or other email clients. With people using a variety of email clients to read their emails, be sure to test your email in the most popular email clients to ensure it looks as you intend, before sending to your entire list.

With Vision6, you can test how Outlook 2003 and Gmail handle your email for free with our Email Testing feature. This makes it very easy for you to identify any potential issues before sending to your recipients.

Unique Open Rates

What

This chart displays the total number of unique emails opened for the first time (as opposed to being opened multiple times by the same recipient) as a percentage of the total number of emails sent.

Findings

Unique Open Rates for H2 2010 were lower (1.14%) than the first half of 2010.



GET YOUR EMAIL OPENED

Coming up with the right subject line to get your email opened can be tricky. If you would like to learn how to write the perfect subject line visit our blog:

www.vision6.com.au/blog/writing-good-email-subject-lines

Unique Open Rates by Send Volumes

What

To remove any bias associated with large sends we have broken the Send Volumes into three categories based on the number of contacts:

- 5 - 499
- 500 - 999
- 1,000+

Findings

Unique open rates have remained very much the same since the last metrics report. The only noticeable change is that the open rates of bigger databases (1000+) has again dropped (by 1.25%) which appears to be a continuing trend over the past two years.

Interpretation

The continued downward trend in open rates of large databases seems to indicate that taking a less targeted approach to email has a negative effect on open rates.



Half 1 - 2010	Half 2 - 2010
5 - 499: 34.24%	5 - 499: 34.27%
500 - 999: 30.30%	500 - 999: 30.56%
1,000+: 22.98%	1,000+: 21.73%

Unique Open Rates by Industry

What

This table displays Unique Open Rates for emails sent by key industry sectors for H1 2010 and H2 2010.

Findings

In this report 16 industries have experienced decreasing open rates while only 11 industries have experienced increasing open rates.

The industries with the highest Unique Open Rates for H2 2010 were Mining/Oil/Gas (31.36%) followed by Govt./Defence (30.70%).

The industry that has most improved since the last report is Construction (+9.09%).

The industry with the biggest decrease in Unique Open Rates was Mining Oil Gas (-6.65%).

Half 1 - 2010: Left Column

Half 2 - 2010: Right Column

Open Rates Increase: 

Open Rates Decrease: 

Industry	Open Rate H1 2010 (%)	Open Rate H2 2010 (%)	% Change H1 2010 to H2 2010
Mining/Oil/Gas	38.01	31.36	-6.65
Legal	32.54	28.61	-3.93
Government/Defence	30.37	30.70	-0.30
Accounting	30.28	25.12	-5.16
Insurance and Superannuation	29.81	27.56	-2.25
Call Centre/Customer Service	28.07	28.98	+0.91
Primary Industry	28.43	27.40	-1.03
Manufacturing/Operations	28.39	24.87	-3.52
Banking and Financial Services	27.68	28.53	+0.85
Real Estate and Property	26.09	24.88	-1.21
Trades and Services	25.22	26.04	+0.82
Retail and Consumer Products	25.01	24.79	-0.22
Education and Training	23.85	22.64	-1.21
Engineering	23.49	25.25	+1.76
Advertising/Media/Entertainment	22.86	20.76	-2.10
Transport and Logistics	22.81	29.84	+7.03
IT and Telecommunications	22.38	23.23	+0.85
Hospitality and Tourism	22.26	20.29	-1.97
Administration	22.09	19.69	-2.40
Other	21.69	22.79	+1.10
Community and Sport	21.49	22.91	+1.42
Consulting and Corporate Strategy	20.91	17.09	-3.82
Health care and medical	19.97	20.23	+0.26
Human Resources and Recruitment	18.79	19.50	+0.71
Science and Technology	18.24	20.83	+2.59
Sales and Marketing	18.21	13.64	-4.57
Construction	14.45	23.54	+9.09

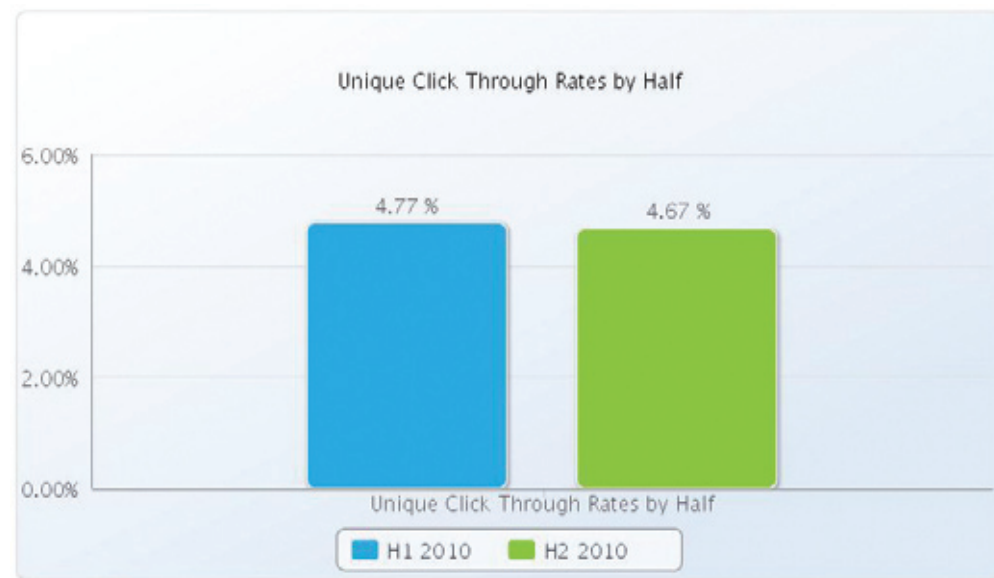
Unique Click Through Rates

What

This chart displays the total number of 'unique link' clicks as a percentage of the total number of emails sent.

Findings

Unique CTRs across all industries, domains and send volumes were lower than the first half of 2010 by 0.10%.



Half 1 - 2010: 4.77%

Half 2 - 2010: 4.67%

FURTHER INFORMATION

For further information about how email design can help you to improve your click through rates check out our "The A-Z of Email Design" whitepaper.

This may be downloaded for free from:
www.vision6.com.au/resources/whitepapers/

Unique Click Through Rates by Send Volumes

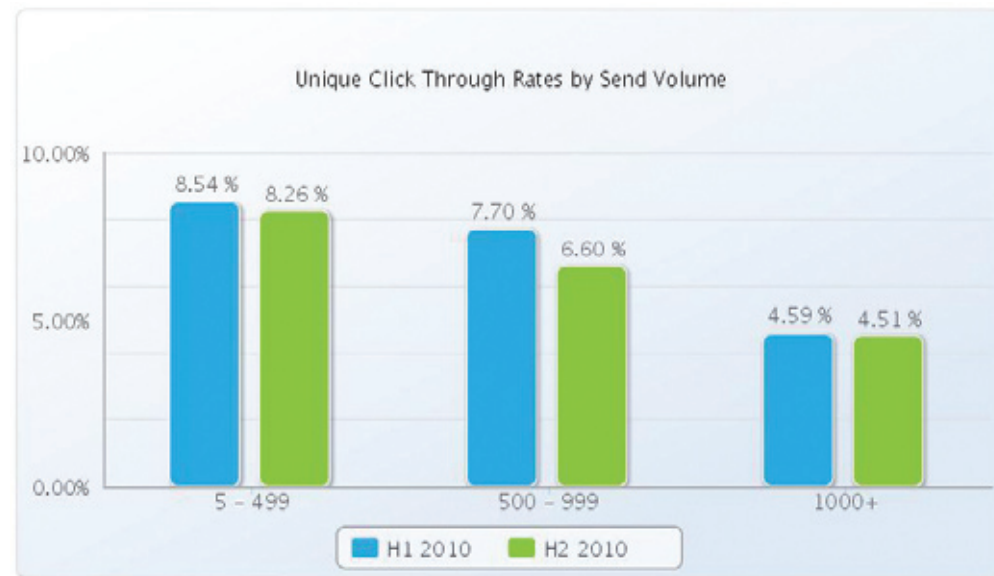
What

This chart displays unique link clicks as a percentage of the total number of emails sent, whereby send volumes are broken into three categories based on the number of contacts:

- 5 - 499
- 500 - 999
- 1,000+

Findings

Unique CTRs were mostly unchanged in the smallest and largest send categories. However the CTR for send volume 500-999 experienced a drop of 1.1%.



Half 1 - 2010	Half 2 - 2010
5 - 499: 8.54%	5 - 499: 8.26%
500 - 999: 7.70%	500 - 999: 6.60%
1,000+: 4.59%	1,000+: 4.51%

Unique Click Through Rates by Industry

What

This table displays the Unique Click Through Rates experienced by each industry for H1 2010 and H2 2010.

Findings

Reflecting the general downward trend of Open Rates and CTR's over the last two years more industries are seeing a decrease in CTR (17) than those seeing a rise (10).

The industry with the biggest decrease in CTR was Accounting (-4.50%) however this appears to be seasonal.

For the first time in the history of this report the industry showing the greatest improvement was Transport and Logistics (+4.53%) this may in part be related to the improvement in bounce rates for this industry. See page 18.

Half 1 - 2010: Left Column

Half 2 - 2010: Right Column

CTR Increase:



CTR Decrease:



Industry	Open Click Through Rate H1 2010 (%)	Open Click Through Rate H2 2010 (%)	% Change H2 2009 to H1 2010
Call Centre/Customer Service	9.49	9.60	+0.11
Mining/Oil/Gas	9.17	7.78	-1.39
Government/Defence	8.86	8.08	-0.78
Accounting	8.66	4.16	-4.50
Insurance and Superannuation	8.04	6.47	-1.57
Education and Training	7.74	6.68	-1.06
Primary Industry	7.48	5.97	-1.51
Legal	6.26	6.16	-0.10
Manufacturing/Operations	5.81	4.38	-1.43
Transport and Logistics	5.48	10.01	+4.53
Sales and Marketing	5.35	4.34	-1.01
Engineering	4.87	6.34	+1.47
Retail and Consumer Products	4.79	5.42	+0.63
Hospitality and Tourism	4.75	4.26	-0.47
IT and Telecommunications	4.74	3.78	-0.97
Trades and Services	4.68	2.91	-1.77
Other	4.67	4.36	-0.31
Real Estate and Property	4.66	5.42	+0.76
Community and Sport	4.46	4.72	+0.26
Advertising/Media/Entertainment	4.24	3.88	-0.32
Health care and medical	4.02	3.53	-0.49
Banking and Financial Services	3.62	4.79	+1.17
Administration	3.47	2.01	-1.46
Consulting and Corporate Strategy	3.46	2.70	-0.76
Human Resources and Recruitment	3.11	3.68	+0.57
Science and Technology	2.66	4.34	+1.68
Construction	2.18	3.35	+1.17

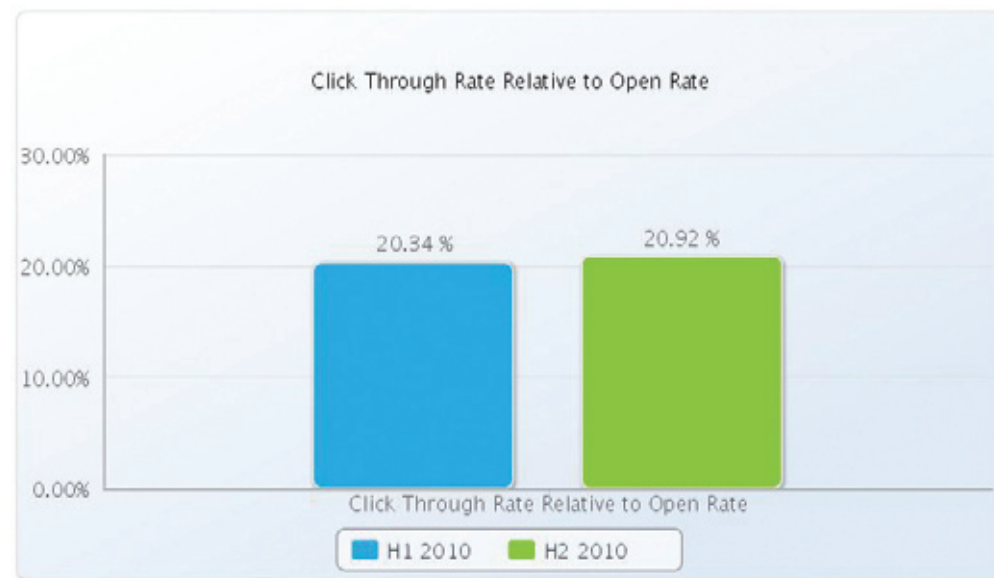
Click Through Rate Relative to Open Rate

What

This chart displays average unique CTR as a percentage of the total number of unique opened emails.

Relevance

This figure indicates how responsive the recipients who have opened an email are, giving a direct measure of the effectiveness of the email's links and calls to action.



Half 1 - 2010: 20.34%

Half 2- 2010: 20.92%

Bounce Rates

What

This chart displays the total number of bounced emails as a percentage of the total number of emails sent. Bounce rates are often used as a key measure of deliverability and include permanent and temporary bounces.

Findings

There has been a consistent trend of bounce rates gradually decreasing since the beginning of these reports in 2006 when the average bounce rate was 12.29%. In this half the bounce rates have plateaued and currently sit at 5.77%.

Key Messages

To minimise bounce rates (increase deliverability) keep a clean database.

Update or delete any permanently bounced addresses.
Implement double opt-in for new subscribers to confirm the validity of their email addresses.

Use a content analysis tool, such as the one offered for free by Vision6 to test your emails against Spam Filters.



Half 1 - 2010:	5.75%	■
Half 2 - 2010:	5.77%	■

FURTHER INFORMATION

Learn how to improve your email deliverability. Download the Vision6 whitepaper “Understanding & Improving Email Deliverability” for free: www.vision6.com.au/resources/whitepapers

Bounce Rates by Send Volumes

What

This chart displays the total number of bounced messages as a percentage of the total amount of emails sent. Send volumes are broken into three categories based on the number of contacts:

- 5 - 499
- 500 - 999
- 1,000+

Findings

H2 2010 saw a further decrease in bounce rates in the smaller category of 5-499 whereas the larger categories remain approximately the same.



Half 1 - 2010	Half 2 - 2010
5 - 499: 6.10%	5 - 499: 5.89%
500 - 999: 6.19%	500 - 999: 6.19%
1,000+: 5.73%	1,000+: 5.75%

Bounce Rates by Industry

What

This table displays Bounce Rates by industry.

Findings

Administration achieved the lowest bounce rate (2.67%), well under half of the overall average bounce rate.

Transport and Logistics showed the greatest improvement reducing their bounce rate by 3.87%.

Transport and Logistics has made its debut in the top 3 lowest bounce rates with only 2.96% of emails bouncing.

Engineering bounce rates are also improving with a drop of 3.81%.

The worst performing industries were: Construction (13.24%), Science and Technology (12.32%) and Trades and Services (12.14%).

Half 1 - 2010:  Left Column

Half 2 - 2010:  Right Column

Bounce Rate Increase: 

Bounce Rate Decrease: 

Industry	Bounce Rate H1 2010 (%)	Bounce Rate H2 2010 (%)	% Change H1 to H2 2010
Accounting	2.56	6.62	+4.06
Call Centre/ Customer Service	3.40	2.68	-0.72
Legal	3.64	4.58	+0.94
Hospitality and Tourism	5.05	4.67	-0.38
Administration	5.07	2.67	-2.40
Real Estate and Property	5.25	4.67	-0.58
Advertising/ Media/ Entertainment	5.32	5.64	+0.32
Other	5.50	7.79	+2.29
Retail and Consumer Products	5.70	4.04	-1.66
Community and Sport	5.84	6.06	+0.22
IT and Telecommunications	6.15	8.08	+1.93
Government/ Defence	6.48	4.69	-1.79
Mining/Oil/Gas	6.61	5.46	-1.15
Primary Industry	6.68	5.70	-0.98
Transport and Logistics	6.83	2.96	-3.87
Consulting and Corporate Strategy	7.22	8.39	+1.17
Trades and Services	7.42	12.14	+4.72
Insurance and Superannuation	7.48	7.26	-0.22
Healthcare and medial	7.56	8.42	+0.86
Education and Training	7.62	8.85	+1.23
Sales and Marketing	7.87	10.10	+2.23
Banking and Financial Services	8.10	8.44	+0.34
Manufacturing/ Operations	8.53	8.12	-0.41
Engineering	8.95	5.14	-3.81
Construction	10.07	13.24	+3.17
Human Resources and Recruitment	10.59	8.36	-2.23
Science and Technology	11.71	12.32	+0.61

Send Volumes, Open & CTR for the Top 15 Domains

What

These charts display the top 15 domains by send volume and their associated Open Rates and CTRs.

Findings

The top 15 domains are all web and ISP based accounts. No business or government domain was listed in the top 15.


hotmail.com once again received almost five times as many emails as any other domain (22.14%).

gmail.com (6.98%) and yahoo.com (4.38%) have overtaken optusnet.com.au and bigpond.net.au since H1 2010.

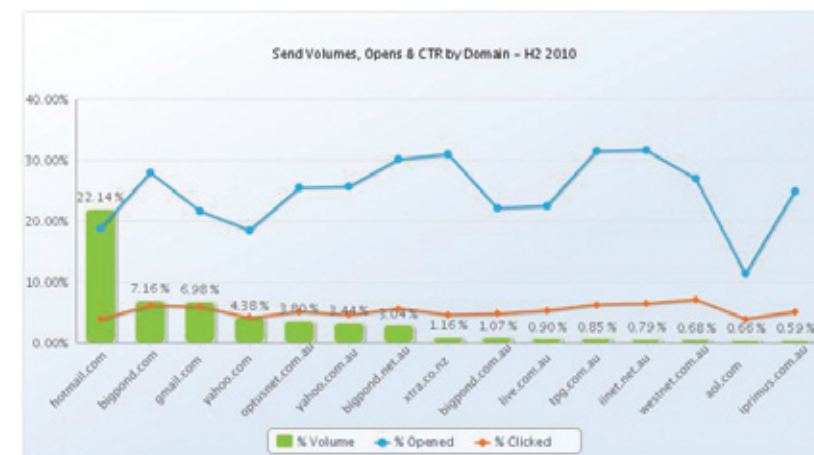
tpg.com.au and iinet.net.au achieved the highest open rates of any domain with rates of over 30%.

% Volume 2010 H1 

% Volume 2010 H2 

% Opened 

% Clicked 



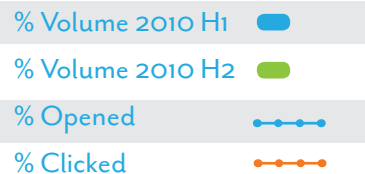
Open, CTR & Emails Sent by Day

What

These charts display the average Open Rates and CTRs by day, and the total amount of emails sent on each day for the first and second half of 2010.

Findings

- Monday led as the weekday with the highest percentage open rate at 23.10%, however overall open rates throughout the week have continued to flatten out considerably.
- Weekdays continue to see fairly even send rates with the exclusion of Mondays. This may be due to senders recognising Monday as a very high volume day for people who do not check emails on the weekend.
- Thursday was the day on which the most emails were sent, despite having fairly average open and click through rates. In comparison Monday and Sunday continue to show good CTR rates.



Time Taken to Open Emails

What

This chart displays the amount of time it takes for recipients to open the email after it has been received.

Findings

- 58.85% of all opened email is opened within 8 hours of delivery.
- 78.21% is opened within 24 hours. This is the highest number since these reports began in H2 2006.
- 87% of recipients email is opened within two days of delivery.

Half 1 - 2010:



Half 2 - 2010:



Key Message

Generally, most recipients who open your email will do so within the first 24 hours. Therefore, be prepared to receive the majority of responses to your email campaign within the first few days after delivery.

However, some recipients may not open your email for several weeks. Therefore, it is important to keep landing pages and associated campaign media active during this period.



Email Clients (NEW)

What

This chart shows the popularity of the different email clients people use to first open their emails.

For example, emails sent to hotmail.com accounts can be opened on iPhone or in Outlook, not just through Hotmail's web interface.

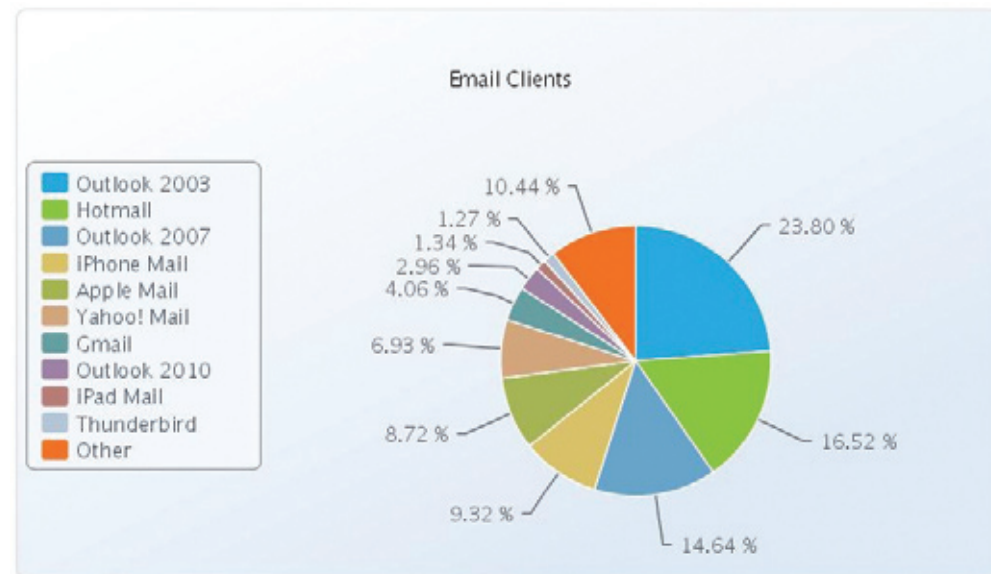
Email clients can be categorised as the following:

- **Desktop application:** Outlook 2003, Outlook 2007, Apple Mail, Outlook 2010 and Thunderbird.
- **Web-based interface:** Hotmail, Yahoo! Mail and Gmail.
- **Mobile device:** iPhone Mail or iPad Mail.

Findings

The most popular email clients used in H2 2010 were Outlook 2003 (23.80%), Hotmail (16.52%) and Outlook 2007 (14.64%).

Over 10% of opened email was read on mobile devices (iPhone 9.32% and iPad 1.34%). With the increasing popularity of mobile devices, it is reasonable to expect this figure to rise in the future.



Glossary & Acronyms

CTRs

Click Through Rates.

EDM

Electronic Direct Marketing.

ISP

Internet Service Provider, e.g. BigPond.

Open Rate

Measures the number of times an email is opened by a recipient as a percentage of the total number of emails sent.

CTR Relative to Open

Measures the CTR as a percentage of the total number of unique opened emails.

Permanent Bounce

Usually means the email address is incorrect or is no longer in operation – sometimes referred to as a Hard Bounce.

Temporary Bounce

Usually means the email address is temporarily unavailable. The most common Temporary Bounce reasons are 'Server Time Expired' (for receiving ISP), 'Delivery Time Expired' (for sending ISP) and 'Mailbox Full' – sometimes referred to as a Soft Bounce.

Unique CTR

Measures the first time a link is clicked by a recipient as a percentage of the total number of emails sent.

Unique Open Rate

Measures the first time an email is opened by a recipient as a percentage of the total number of emails sent.



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