

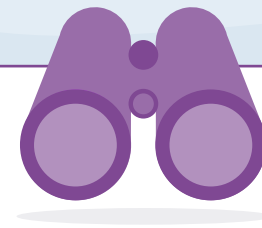


The 2023 State of

ESPs

Report

All the latest in Email Service Provider (ESP) uses, data, and trends—from marketers like you.



What to expect in

The 2023 State of ESPs Report

Welcome to the third installment in our four-part series on the state of email in 2023! Yes, livin' on a prayer or not, we are more than halfway there! Thanks for sticking with us through the nitty gritty of [email workflows](#), the beautiful flowing waterfalls of [email design](#), and now, finally, joining us for our deep forest expedition into the world of [Email Service Providers \(ESPs\)](#).

In this report, we'll cover the tools we use to send emails to our beloved subscribers and customers. An ESP, most simply, is the software or program you probably spend the most time in as an email marketer. It stores the email addresses of your audience, it hosts all the lovely emails you've built, and powers the mighty send button that we're all so fond of. It's every email marketer's best friend—or worst enemy.

It's important to have and utilize an ESP that best fits the needs of yourself, your business, and your audience. And that's why we included a look at ESPs as part of this report series. We want to shed light on what tools email marketers are using in each industry, at each company size, and whether they're happy with those choices.

With that data, we hope to empower marketers like you to choose the tools that will best suit your email-sending needs.

About this project

Just like the previous two reports, we reached out to all the very talented marketers we know to get this data. We surveyed 750+ email marketers worldwide on their email service providers (ESPs), including what they use, how they use them, and where we'd all like to see those ESPs improve.

Respondents included email marketers from the following star-studded list of companies.

There's more where that came from, but some of you were shy. We get it. Can't have anyone knowing whose secret sauce is whose. 🌮

GROUPON

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Ready to find out what's going on with ESPs?

Strap on your hiking boots, grab those binoculars, and hop in the Jeep. We're about to head out on our most serious journey yet—driving out into the vast forest of email service providers. If we're lucky, we'll set our eyes on some big, impressive email tools that you can take back to your team.

Let's get started!

Q: What is an Email Service Provider (ESP)?

A: An ESP is the software that you use to store email addresses and lists, segment audiences, and send email campaigns to your list of subscribers.

- ➔ **Insights Overview**
- ➔ **Chapter 1: The Email Service Providers**
- ➔ **Chapter 2: The ESP Users**
- ➔ **Chapter 3: Integration & Innovation**
- ➔ **Chapter 4: Personalization & Reach**
- ➔ **Chapter 5: Action Items**

Insights Overview

Here's a quick overview of the top takeaways from this year's research into the state of ESPs.

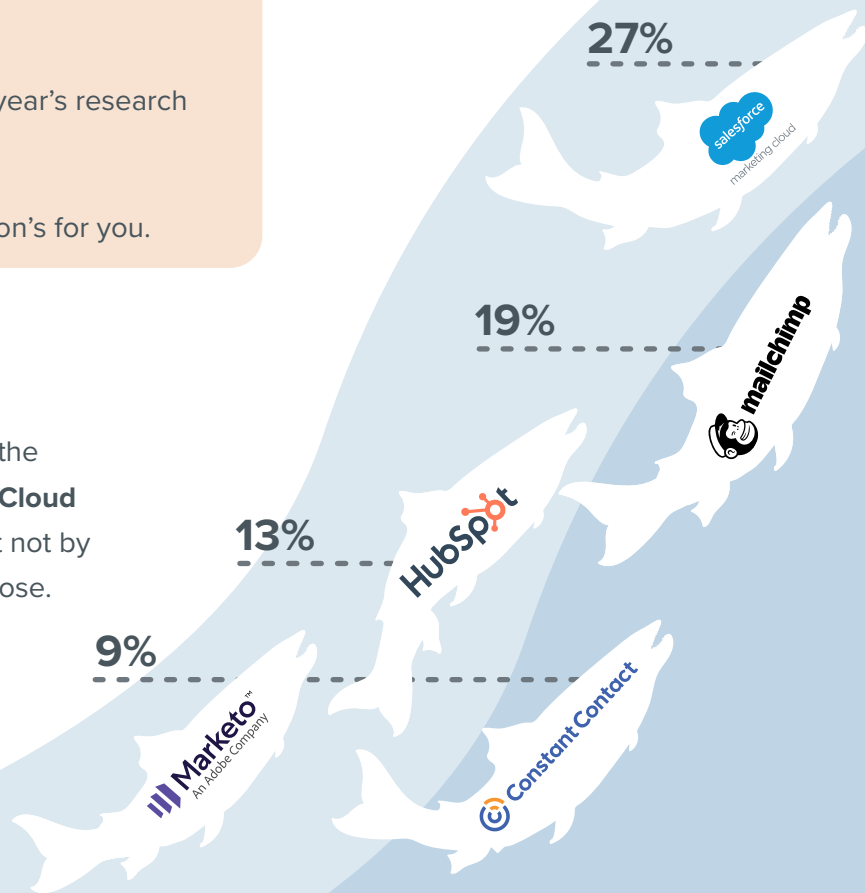
If you're in a rush and just need the highlights, this section's for you.

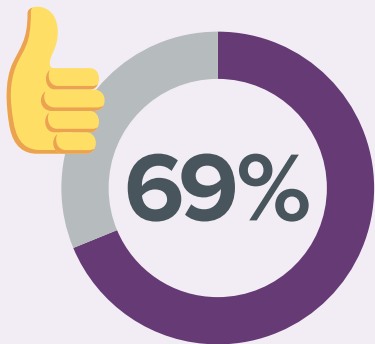
1. The most common ESP in use today is Salesforce Marketing Cloud (27%)

Out of all the marketing professionals we surveyed, the largest percentage are using **Salesforce Marketing Cloud (27%)** to run and manage their email campaigns. But not by much! The winners in this contest came out pretty close.

The top five on our ESP leaderboard are...

- Salesforce Marketing Cloud (27%)
- Mailchimp (19%)
- HubSpot (13%)
- Constant Contact (9%)
- Marketo (9%)





69% of SFMC users say they are somewhat or very satisfied with their ESP

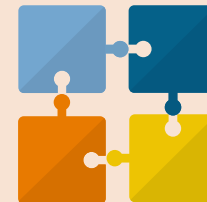
2. Out of our top five ESPs, Salesforce Marketing Cloud also had the highest satisfaction rate

Out of those top five, satisfaction rates matched up pretty similarly with popularity. **Salesforce Marketing Cloud** users are most satisfied with their ESP, with **69%** of users stating they are somewhat or very satisfied. HubSpot, Mailchimp, Constant Contact, and Marketo all got great ratings here as well, but SFMC led the pack.

3. Only 9% of email marketing leaders say their email marketing channel is very highly integrated into their other marketing channels

In the world of artificial intelligence (AI) and automation, integrated marketing is essential. We found that many folks don't feel their ESP is doing more than an adequate job at integrating with other marketing channels and tools. In fact, only **9% of email marketing leaders say their email marketing channel is very highly integrated** into their other marketing channels.

This is the biggest area where we saw ESPs having room to grow across the board.



Get more out of your email marketing tech stack with Litmus.

[Check out our integrations](#)

4. Most ESPs have robust personalization capabilities

In a world where [over 80% of customers](#) are more likely to make a purchase after a personalized experience, personalization is a must. And most ESPs have the tools to make a wide range of personalization choices a reality. In fact, we learned that when it comes to personalization in subject lines, using dynamic content, or using animated GIFs or PNGs, **more than 50%** of marketers said their ESP handled those elements ‘very well’.

This is the biggest area where we saw ESPs winning across the board—personalization is easier than ever to implement within the ESP!



That’s the short and sweet round up of our data on the state of ESPs in 2023. Hungry for more? Just keep turning pages!

CHAPTER ONE

THE EMAIL SERVICE PROVIDERS (ESPS)

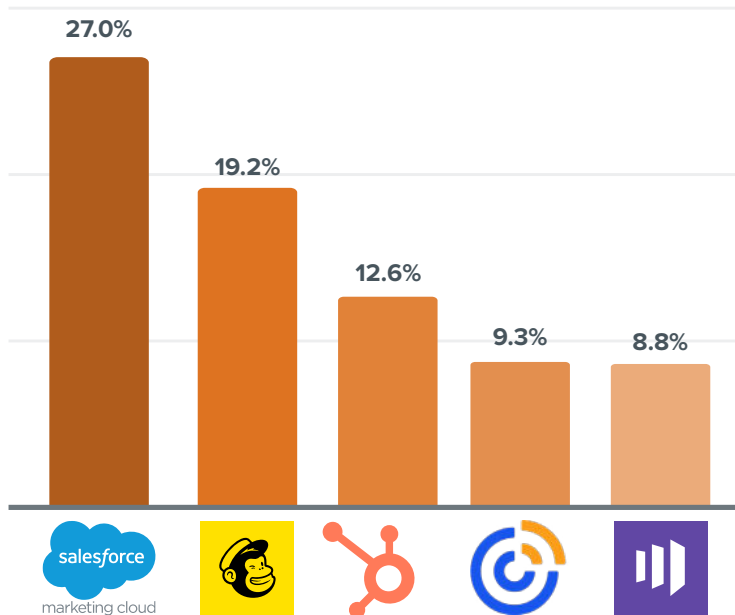
The land of Email Service Providers (ESPs) is a wild one, populated by massive beasts that require special training to use and perform many powerful functions. In this section, we'll take a look at the data we surfaced on these mighty beasts themselves, in order to learn more about how each ESP is being utilized and received by teams around the world.

We'll splice data by the most simple metric—popularity—then get into the nitty-gritty and break down that same data by industry and by user satisfaction. So if you've ever wondered if your competitors are hunting with the same tools you are? Now you'll know. 🐾

Without further ado, the moment you've all been waiting for...

The most popular ESPs in use today

We'll start by simply examining the most popular ESPs in use today. Popularity doesn't necessarily mean best or most efficient, here—we're just looking at what tools are used most often when it comes to sending emails. (So if your favorite tool isn't as high on this list as you expected, make sure to tell your friends about it!)



That said, the top five most common ESPs in use today are **Salesforce Marketing Cloud (27%)**, **Mailchimp (19%)**, **HubSpot (13%)**, **Constant Contact (9%)**, and **Marketo (9%)**. Those numbers are pretty close, with Salesforce out in the lead, but Mailchimp through Marketo within spitting distance of each other.

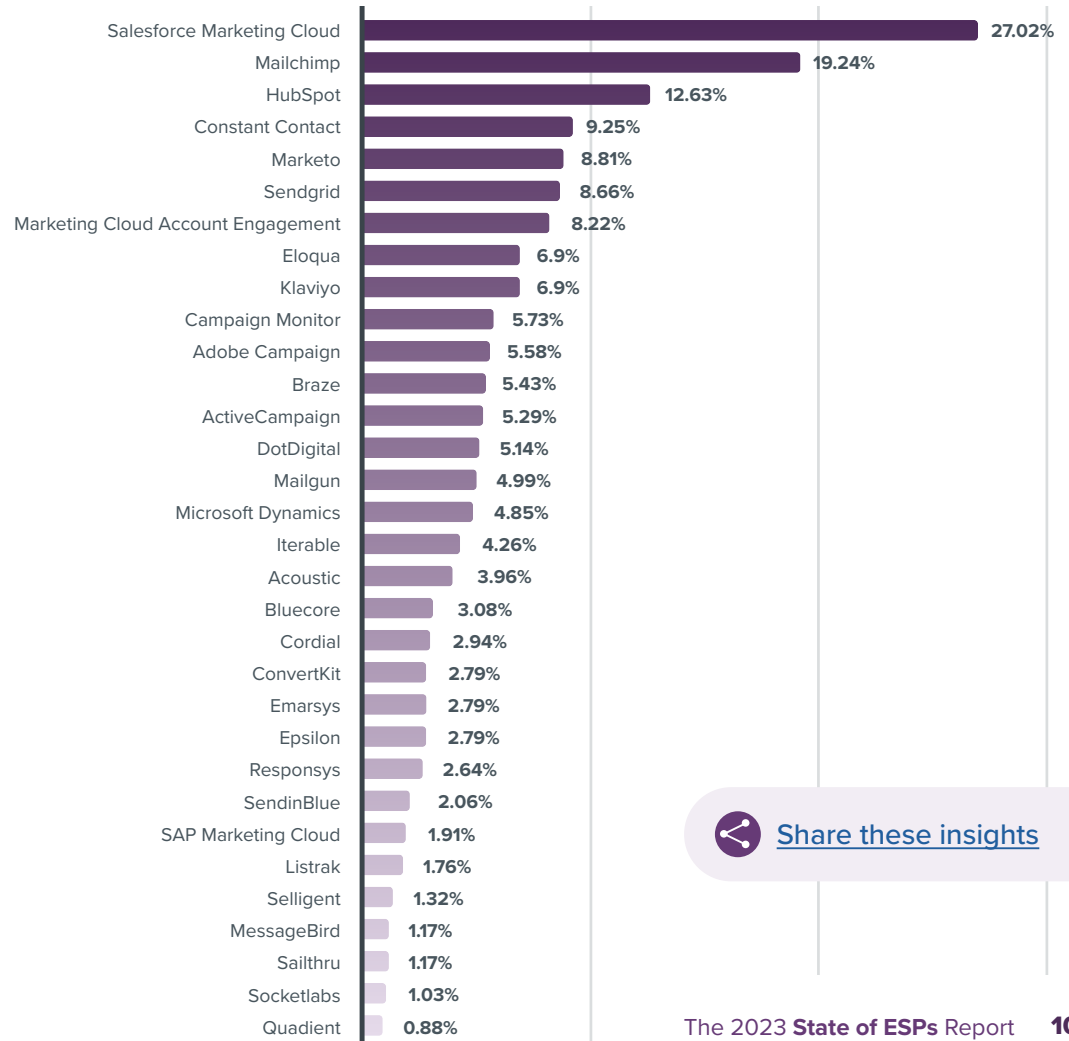


Scroll for the full data below

Which ESP(s)/MAP(s) do you currently use?

For reference, there have been some shakeups in Email's Most Popular in the last few years! In our [2021 State of ESPs Report](#), these were the top ESPs:

Salesforce Marketing Cloud (23%), Mailchimp (21%), Marketo (10%), HubSpot (10%), and Pardot (8%). While Salesforce and Mailchimp continue to hold the top spots, Marketo is falling down the list and Constant Contact is definitely gaining ground. We're excited to see how this landscape continues to change and evolve over the next few years!



[Share these insights](#)

Which ESPs are most popular per business type?

Now, let's get even more granular. We broke down the answers to the most popular ESP by industry, to see if there were any interesting distinctions to make at the industry level.

And there were! For example, marketing professionals prefer **Mailchimp (13%)**, the software world loves **Marketo (12%)**, while Salesforce Marketing Cloud continues to clean up shop in several other industries.



Agriculture, energy, mining, & commodities

Bluecore, Dotdigital, Klaviyo, and Mailgun



Automotive

Iterable and Salesforce Marketing Cloud



Consulting, legal, staffing, & business services

Hubspot



Education, higher education, & training

Salesforce Marketing Cloud



Financial services

Salesforce Marketing Cloud



Fitness, wellness, beauty

Klaviyo, ConvertKit, Braze, Sendgrid



Government, public administration, & political

Adobe Campaign, Constant Contact, Microsoft Dynamics



Healthcare, pharmaceuticals, & social services

Salesforce Marketing Cloud



Insurance

Salesforce Marketing Cloud



Manufacturing

Eloqua



Marketing, PR, & advertising agency or freelancer

Mailchimp



Media, publishing, events, sports, & entertainment

Salesforce Marketing Cloud, Mailchimp



Nonprofit

Salesforce Marketing Cloud



Software & technology

Marketo



Telecommunications & utilities

Bluecore, Dotdigital



Transport, wholesale, distribution, & logistics

Aweber, Bluecore, ConvertKit, Marketing Cloud
Account Engagement (Formerly Pardot)



Travel, airlines, tourism, & hospitality

Salesforce Marketing Cloud



Real estate & construction

Salesforce Marketing Cloud



Retail, ecommerce, & consumer goods or services

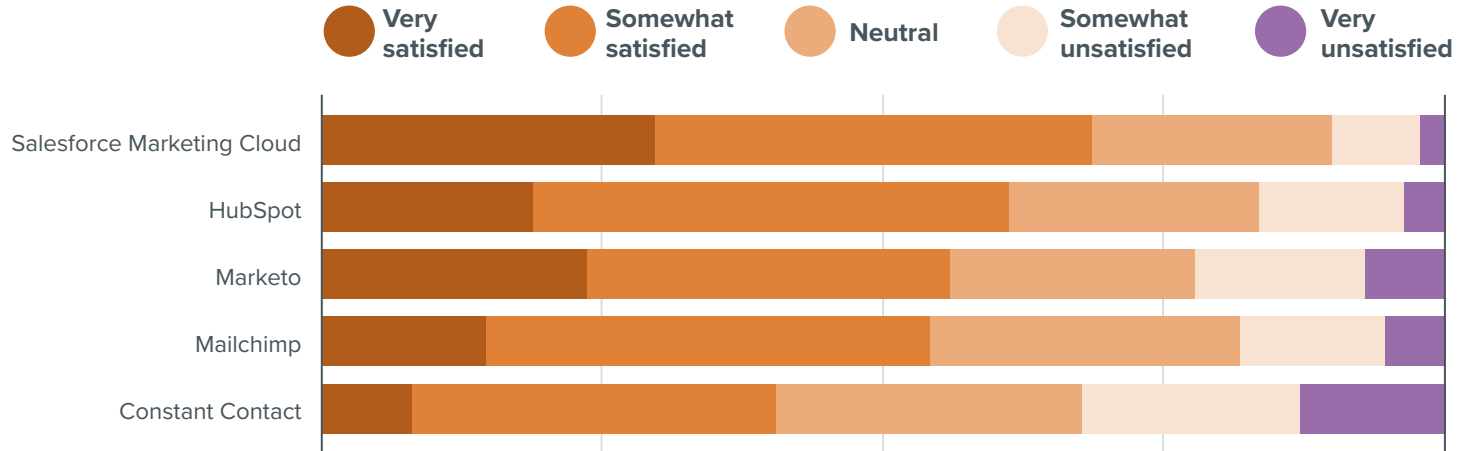
Salesforce Marketing Cloud

How satisfied are you with your ESP?

Next, we asked perhaps the most controversial question: do you actually, well, like your ESP? Out of these results, Salesforce Marketing Cloud emerges as the highest overall winner once again, with the most users rating themselves satisfied with their experience, with **30% reporting very satisfied, 39% somewhat satisfied, 22% neutral, 8% somewhat unsatisfied, and 2% very unsatisfied.**

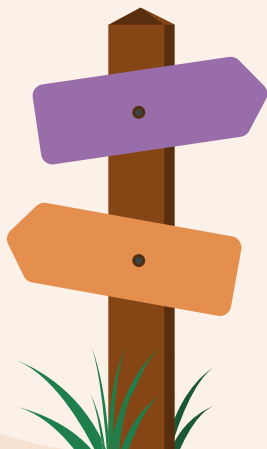


How satisfied are you with your ESP(s)/MAP(s)? Top 5 showing



Results to the satisfaction question were mixed, as expected, but the top five email service providers from the cool kid's table in the previous questions did pretty well!

Salesforce Marketing Cloud users are most satisfied with their ESP, with **69%** of users stating they are somewhat or very satisfied. **HubSpot** came in second, with **61%** of users stating they are somewhat or very satisfied with their ESP. **Marketo (56%), Mailchimp (54%),** and **Constant Contact (40%)** all ranked well here as well.



Switching ESPs

If you haven't thought about switching ESPs at least once in the last year or so, you're probably lying to yourself. We all kick around the idea! But, it's a time-consuming process, and email marketers are loath to embark on it. In fact, we learned that while **15% of email marketing leaders have switched ESP providers in the past year,** **65%** of email marketing leaders have been with their current ESP for **at least one year.**

The business type *most* likely to switch their ESP? **Business-to-business (B2B).**
The business type *least* likely to switch their ESP? **Business-to-consumer (B2C).**

So...
How's all that
going for us?

Overall, we can see that while there are a lot of ESP options—and certainly some that are more popular than others—there are also some trends per industry that are worth following. If you're in Agriculture, for example, what you'll need out of an ESP will be very different than what someone who works in Software will need from their ESP!

Ultimately, no one but your team can decide which ESP is right for you and your business needs... and you can always switch if you really need to.

“Everyone has their favourite or least favourite ESP for all sorts of reasons. Absolutely consider what platform other marketers are using, but the ESP you use needs to support your business goals. Which might not be the most popular one.”

- **Jaina Mistry**, Director of Email and Content at Litmus



CHAPTER TWO

THE ESP USERS

Yes, that means you! In this chapter, we'll go beyond the ESP itself to discuss perhaps arguably the most important part of the email ecosystem—the ESP user. We'll cover the responsibilities of email teams, the most common ESP per team size, and who owns the ESP management itself. If there's anything we've learned through years of research into marketing tools and teams, it's that while the tool is important, so is the team using it.

Because really, where would we be without our email teams? 😊

Let's dive in and look at some data on how email teams interact with their Email Service Providers!

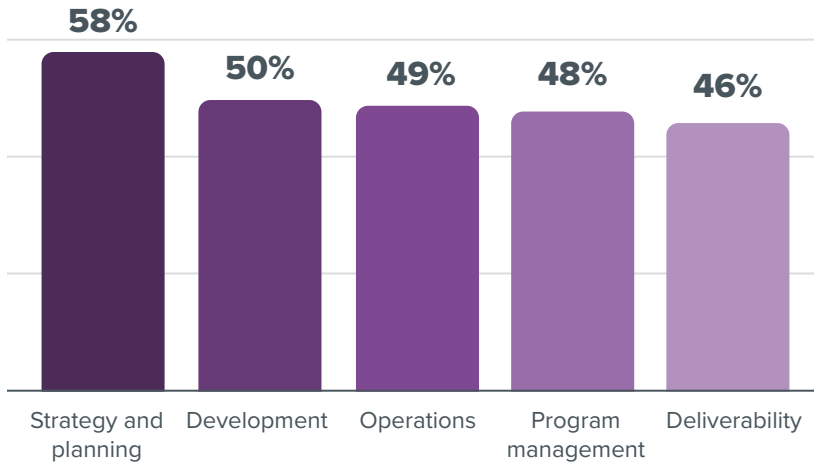


The responsibilities of email marketing teams

First, let's look at the responsibilities of email marketing teams. We can't all be designers and developers, so who else is on the docket?

Responders to our survey shared that the most common job responsibilities for email marketing teams include **Email strategy and planning (58%)**, **Email development (50%)**, **Email operations (49%)**, **Email program management (48%)**, and **Email deliverability (46%)**.

The most common email job responsibilities for email marketing teams



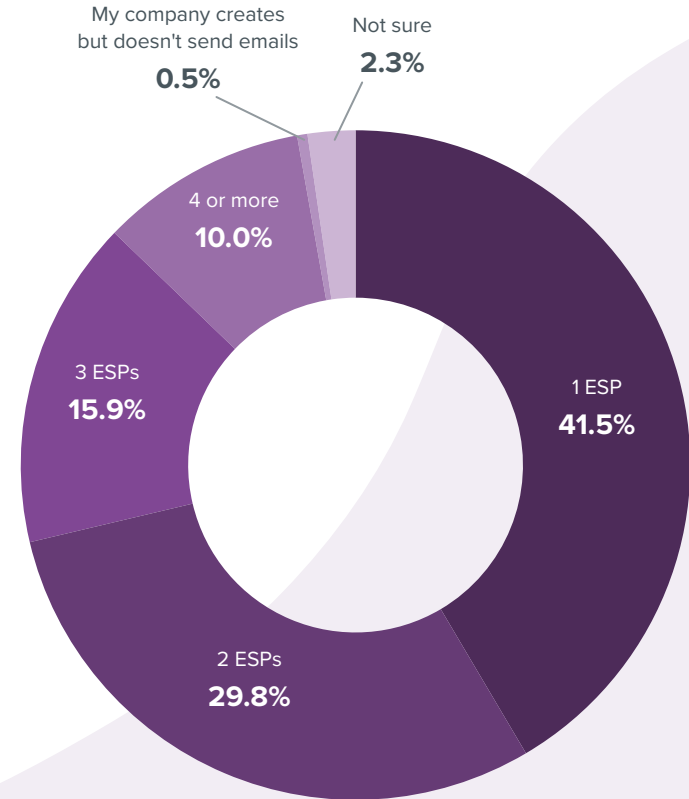
As we can see from this data, the most common email responsibility isn't necessarily email development, but is actually **Email strategy and planning (58%)**. While building emails is important, planning and executing a successful email program definitely takes priority.

The number of ESPs and MAPs in use

Next, let's consider the number of ESPs and Marketing Automation Platforms (MAPs) in use in your average marketing team. According to our data, **42% of email marketing teams use one ESP**. However, **30% use two ESPs or MAPs, 16% use three, and 10% actually use four or more**, so there's still a lot of variety in the way marketing teams are utilizing these tools.

The percentage of users using only one tool here is fairly large, which is perhaps what most would expect, but there are still quite a few using several. Those of you using four or more... We have some questions.

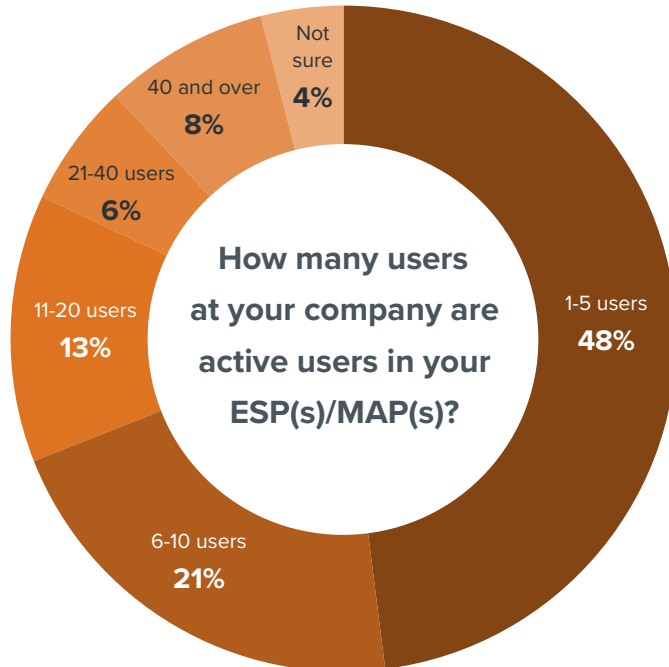
Fun fact: Out of these ESP users, we found that the business type most likely to use many ESPs was **Agencies**. This makes sense, as agencies will select the right ESP for their client. The business type least likely to use many ESPs was **B2B companies**.



Who owns the ESP management?

Especially at a larger organization, the question of who owns the ESP is a big one. We found that for over half of the organizations we surveyed, **the email marketing team owns the relationship with the ESP (51%)**. For **39% of organizations**, the marketing operations team owns the relationship with the ESP. **External partners** manage ESP relationships in only **7% of organizations**.

“ For over half of the organizations we surveyed, the email marketing team owns the relationship with the ESP.



The number of people on each team actively using an ESP or MAP

And finally, let's look at the number of individual users in each company's ESP or MAP. We found that the largest percentage of users had between **1-5 users in the ESP or MAP (48%)**, followed by **6-10 users (21%)**, **11-20 users (13%)**, **41+ users (8%)**, and **21-40 users (6%)**.

Altogether, this means that over **68% of organizations have 10 or fewer ESP users**. That's really not very many! You are the giants whose shoulders we all stand on!

So...
How's all that
going for us?

Overall, we can draw the conclusion from this data that most email teams are still fairly small and being asked to do a lot. Most organizations have one ESP, with less than 10 users in that ESP, and those users are responsible for everything from strategy to boots-on-the-ground email production.

For those using several ESPs or MAPs, this could be a symptom of another marketing trend we've observed recently, which is that email marketers are now using specific platforms for specific purposes. For example, one platform for marketing emails, one for transactional emails, or one for triggered/customer onboarding emails. Sometimes these different types of emails are even owned by different departments—all of which points towards a trend of more specialized platforms out there designed for specific needs.

“The benefits of integrating your ESP with your marketing tech stack are endless, but the heart of all those benefits is that you can better understand your audience's interests and actions. This allows you to create a more consistent experience for them, and to optimize your marketing efforts based on what you know they want, need, and respond best to.”

- Constant Contact Partner Marketing Team



CHAPTER THREE

INTEGRATION & INNOVATION

Now that we've covered the stats on the ESPs themselves and the marketing heroes who work with those tools every day, let's take a look at the future of ESPs. Whether that looks like innovations on the horizon, integration with other tools and technologies that make wild new feats of analysis or delivery possible, or some combination of the two—the future is bright.

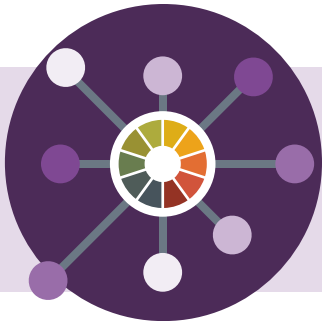
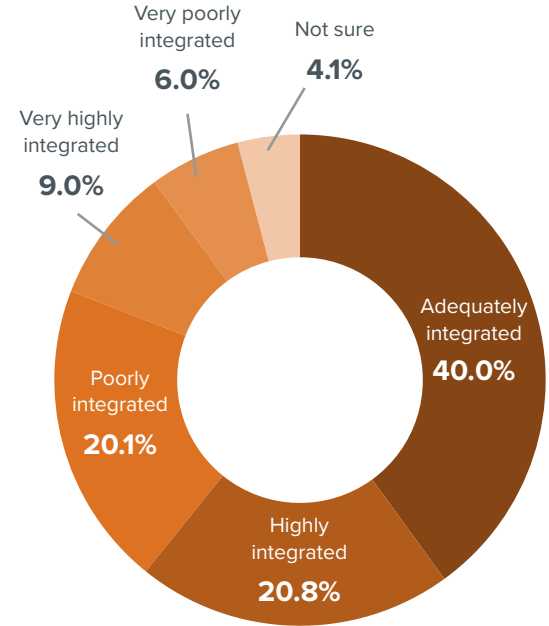
Let's take a look at the horizons of integration and innovation when it comes to your ESP!

Integration between ESPs and other marketing channels

As we all know, in marketing, [integration is the name of the game](#). And that's only more true when it comes to one of the hardest working tools in your tech stack! We asked our respondents how well their ESP was integrated into their other marketing channels, and the results were... mixed, to say the least.

The highest percentage of respondents said their ESP was only adequately integrated into their other marketing channels! And only **30% said their ESP was highly integrated or very highly integrated**.

When only **9%** of email marketers say their email marketing channel is **very highly integrated into their other marketing channels**, that sounds like an opportunity to us!



Get more out of your email marketing tech stack. Our broad range of integrations can help you better connect your email marketing tech stack—and bring your team's workflow to the next level. Litmus is here to help you get the most out of your email marketing. [Learn more](#)

Winners in the integration game

While we're here, let's take a pause to look at some standouts in the integration field.

Q: Which business type had the best integration between marketing and email marketing channels?

A: Freelance

Q: Which business type had the worst integration between marketing and email marketing channels?

A: B2C

While the B2C statistic above may not surprise you, the Freelance data certainly surprised us. There's probably an observation in there somewhere about mobility and the ability to self-manage leading to innovation and integration. But you'll have to consult with the freelancers in your life for more of their secrets.

Implementation of new features and innovations

Next, let's talk about innovation. This is often a contentious topic—just like there's always someone at your organization who hates change and still uses the oldest possible version of Outlook—but it's a big part of keeping your company at the cutting edge of email innovation.

The bad news is that many folks don't feel their ESP is actually innovating enough. In fact, nearly half of organizations say their ESP has introduced fewer than 5 innovations in the past year.

We asked our audience how many innovations their ESP had introduced in the past year. Out of those responses, **47% said 1-5 innovations, 18% said 6-15 innovations, 6% said more than 15 innovations, and 29% said they were not sure how many innovations.** (So valid, y'all.)

So...

How's all that
going for us?

When it comes to integrations and innovations, there's lots of room for improvement. In a world where half of all marketers are only adequately integrating their ESP with other parts of their tech stack, that's a lot of [time and insight left on the table](#). We can do better than adequate!

And of course, if you're an ESP looking for innovation ideas, adding more integrations or making integrations easier is a great place to start!



Integrating your ESP with other marketing tools empowers you to create seamless customer experiences, automate workflows, and boost your ROI by creating a source of truth for your customer and marketing performance data."

- **Jamal Miller**, Senior Director of Product Marketing at Intuit Mailchimp



CHAPTER FOUR

PERSONALIZATION & AI

Finally, let's cover personalization and artificial intelligence (AI) in the ESP. This is the final stage in our journey into the forest of email sending and list management, so make sure to keep your eyes peeled for the stats you can snap screenshots of and take home as souvenirs.

Wondering why these numbers on personalization look a little different than the ones in [The State of Email Design Report](#)? Well, designers and developers work with personalization elements a little differently, since designers will use personalization to serve unique products or custom images. Strategists and marketing program managers, however, may be more likely to personalize a subject line, use other personalization tokens like shopping history or birthday, or use other more program-centric dynamic elements.

With that in mind, let's look at how the Marketing Operations folks use personalization within the ESP.

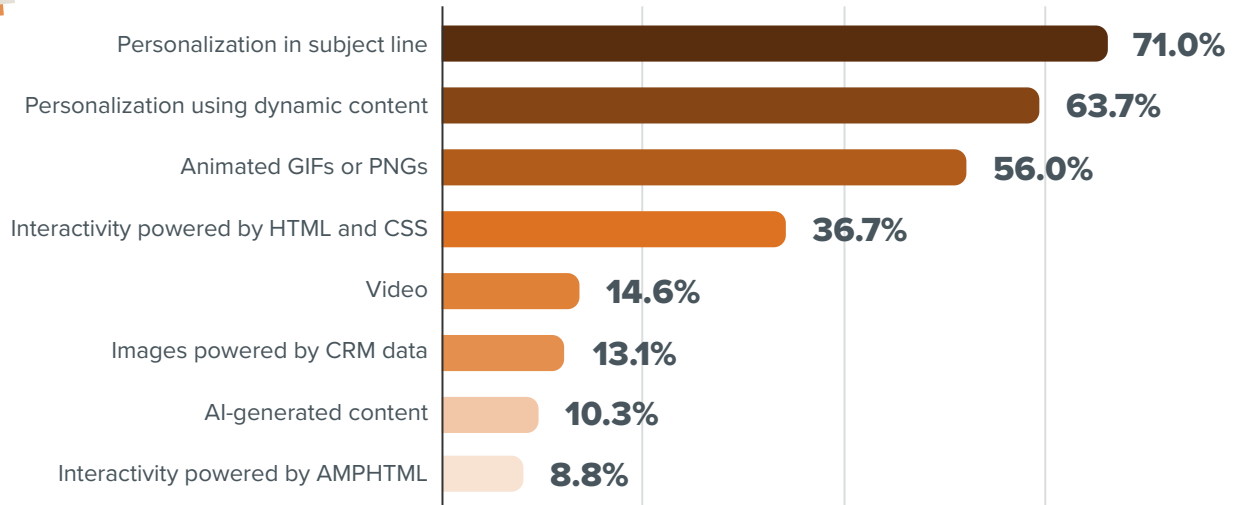




Personalization in email programs

Personalized content was a big hit with the Email Designer audience, so it should come as no surprise that the Operations crew loves it too. When we asked our audience which email elements they personalized most often, they listed **Personalization in the subject line (71%)**, **Personalization using dynamic content (64%)**, **Animated GIFs or PNGs (56%)**, **Interactivity powered by HTML and CSS (37%)**, and **Video (15%)**.

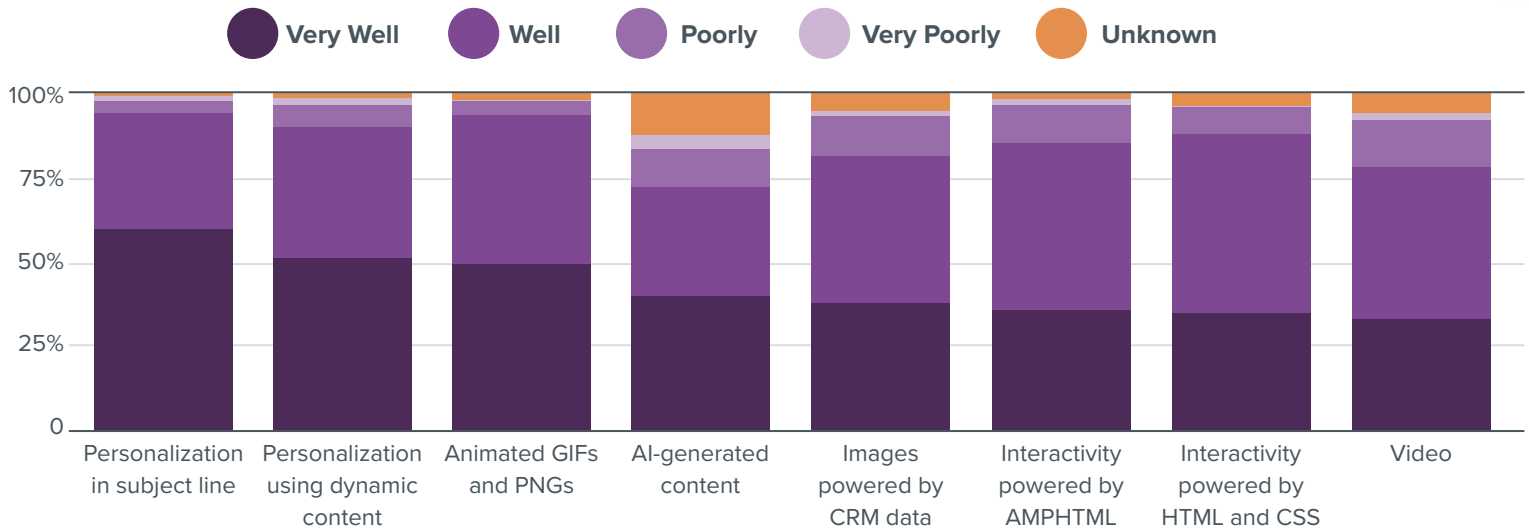
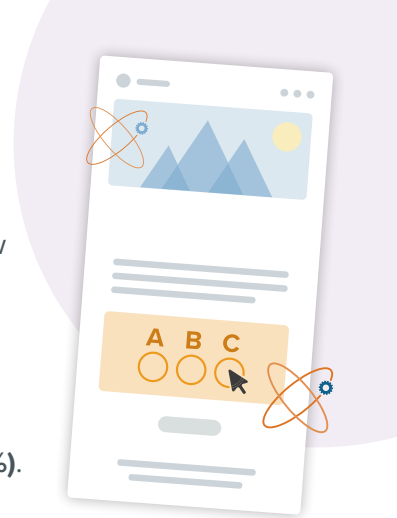
Do you regularly include the following elements in your emails?



How well does your ESP handle personalized elements?

Perhaps the next relevant question to ask after whether you use personalization elements, is whether that works out well for you or not. And in a report about ESPs, we certainly want to know whether your ESPs are helping or hindering your personalization efforts or not.

The personalization elements that email marketers said their ESP handles ‘very well’ included **Personalization in the subject line (60%)**, **Personalization using dynamic content (52%)**, **Animated GIFs or PNGs (50%)**, **Interactivity powered by HTML and CSS (35%)**, and **Video (34%)**.



Looking at the previous page's chart, we can see, we can see that most ESPs handle the common personalization elements well. We can also see some other trends here, namely that **71% of email marketing leaders use personalized subject lines**, and **64% of email marketing leaders use personalization with dynamic content**.

That's just more fuel for the personalization fire! [Personalization is the new industry standard](#) for email, whether you're in design, development, program management, or any other avenue of email.

Artificial intelligence

Last but not least, let's consider artificial intelligence. This element is relatively new to the email game, so we expected results to be a little bit more scattered—but ESPs handle AI well overall. In fact, **40% of marketers said their ESP handles AI-generated content 'very well'**!

Q: Which industry is most likely to use AI for email marketing?

A: Transport, wholesale, distribution, & logistics

Q: Which industry is least likely to use AI for email marketing?

A: Insurance

We expected there to be a little bit more resistance or at least technological roadblocks around the idea of implementing AI, but we were excited to find that most respondents shared very few challenges around AI in the ESP.

So...
How's all that
going for us?

When it comes to personalization, artificial intelligence, and other innovations in email technology that can impact the ESP, we can see a lot of progress in these areas from our beloved ESPs. The tools of our trade are pivoting to keep up with the pace of progress, and we appreciate the dedication to continuing to make it easier to use tools like AI to keep pushing the horizons of what's possible in email.

We're excited to see what the future holds!"

“*Creating personalized emails can seem daunting, but there are more tools at marketers' fingertips now more than ever before to execute personalization at scale.*”

- **Hannah Tiner**, Marketing UX Design Manager, Litmus

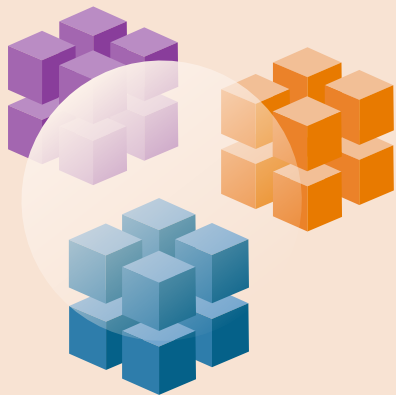


CHAPTER 5

ACTION ITEMS

This brings us to the end of our tour through the top ESPs on the market today, and how teams like yours are using them. (Thank you for keeping hands and feet inside the ride at all times.) We learned a lot about which ESPs are most popular—and which ones are quiet up-and-comers—and we hope you did too.

Before we go, however, we'll leave you with a few of our top takeaways from this data.



#1 Evaluate your needs before choosing an ESP

The best type of ESP for your needs will vary based on sector, team size, email volume, and more. As we saw in the industry breakdown section, the ESP favored by marketing teams varies widely by the industry you're operating within. So do your research, evaluate your team needs, and ask a lot of questions before [selecting an ESP](#).

And if you aren't using the right one and need to migrate? That's okay too! There are lots of resources available for [migrating ESPs smoothly](#), and your team will be grateful in the long run that they're using a tool made for the job at hand. And hey, your subscribers will probably appreciate it too.

“If you're thinking about migrating to a new ESP, look for an ESP that won't just support your current needs, but also your needs in the next 5 years. You should consider team growth and change, how you'll be using email, and even list growth.”

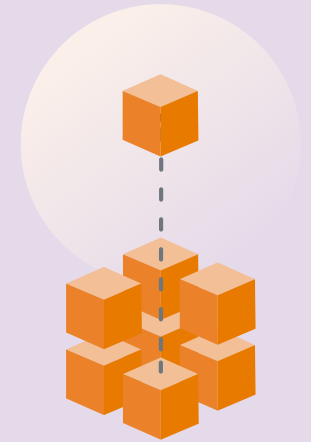
- Jaina Mistry, Director of Email and Content at Litmus



#2 Look for an ESP that integrates with other marketing channels

Integration is the future, and that's just a fact. Some of the most popular ESPs respondents to our survey shared are leaders in this space—like Salesforce Marketing Cloud—and it's worth noting that could be a reason why those leading ESPs are quite so popular! It's important to look for an ESP that [integrates with other marketing channels](#).

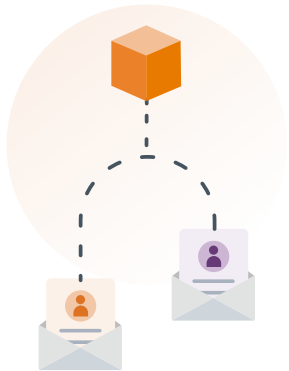
When it comes to your current ESP, be sure to look for more integration opportunities with the tech stack you already have. Are there integration opportunities you haven't taken advantage of yet that you could look to implement?



#3 Most ESPs support personalization and other interactive elements well

As we learned in our research, most ESPs support [personalization and other interactive elements](#) very well in 2023, so there's no excuse—you should be utilizing them! Whether that's through personalization tokens within the email body, dynamic content that serves custom recommendations based on preferences, or personalized images, there are [so many ways to create impactful personalization in your emails](#).

If your ESP doesn't have all the personalization options you want... we know some folks. [Litmus Personalize](#) integrates with most major ESPs and offers a wide variety of low-implementation personalization tools like countdown timers, timed images, live polls, and more!





Contact Us

Hi! We're Litmus—a complete solution for email optimization and personalization that empowers you to transform your entire email workflow. We help email marketers like you create, personalize, test, review, and analyze every email to make every send count. For more information, please check out litmus.com or connect with us on [LinkedIn](#) and [X \(formerly Twitter\)](#). Or both. We won't stop you.

