

Apple User Experience & Branded Mail

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ESPC Spring Meeting



Moderator & Panelists



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 **Zillow**[®]



Agenda

Apple User Experience – 20 minutes

- Why are we talking so much about Apple?
- What does all this mean for performance and conversion for our clients?
- What to do about it: recommended next steps

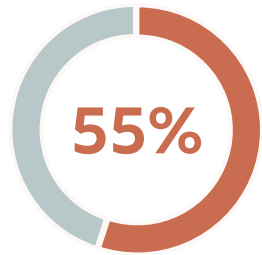
Apple Branded Mail & BIMi – 20 minutes

- What's the difference between BIMi and Apple Branded Mail
- Do you really need both?
- Adoption trends & implementation challenges



Why are we talking so much about Apple?

Market share & performance declines

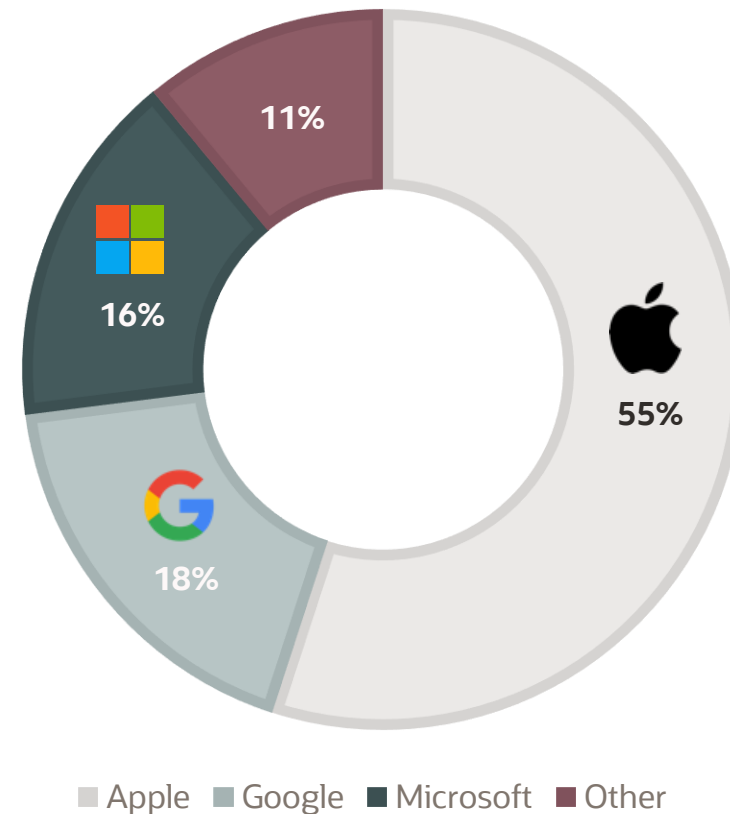


The average engagement rate among OS vendors is 55%.



The changes to the Apple Mail App are significant enough that the industry is asking if email performance is dipping due to Apple iOS 18 and Apple Intelligence

Average Engagement by OS Vendor



Source: Average for Responsys Oracle customers as of March 2025

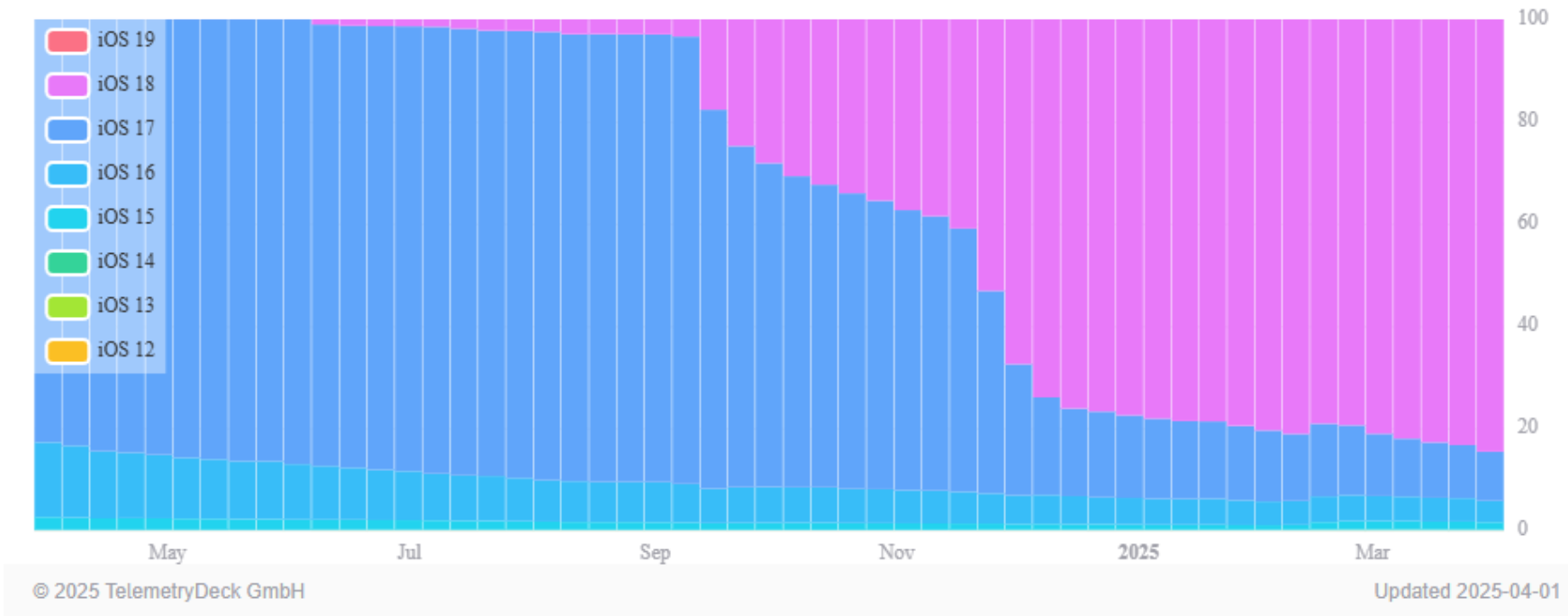


iOS 18 Market Leader

Adoption of iOS 18 happened relatively quickly

After its launch in September 2024 iOS 18 has by far become the version with the highest share. It was at 84.64% at the end of March 2025.

iOS Major Versions



Source: <https://telemetrydeck.com/survey/apple/iOS/majorSystemVersions/#:~:text=After%20its%20launch%20in%20September,of%20end%20of%20March%202025.>



iPhone User Poll

**Do you have iOS 18.2 or newer
installed on your phone?**

And do you like it?



iOS 18 Apple Mail Experience Updates

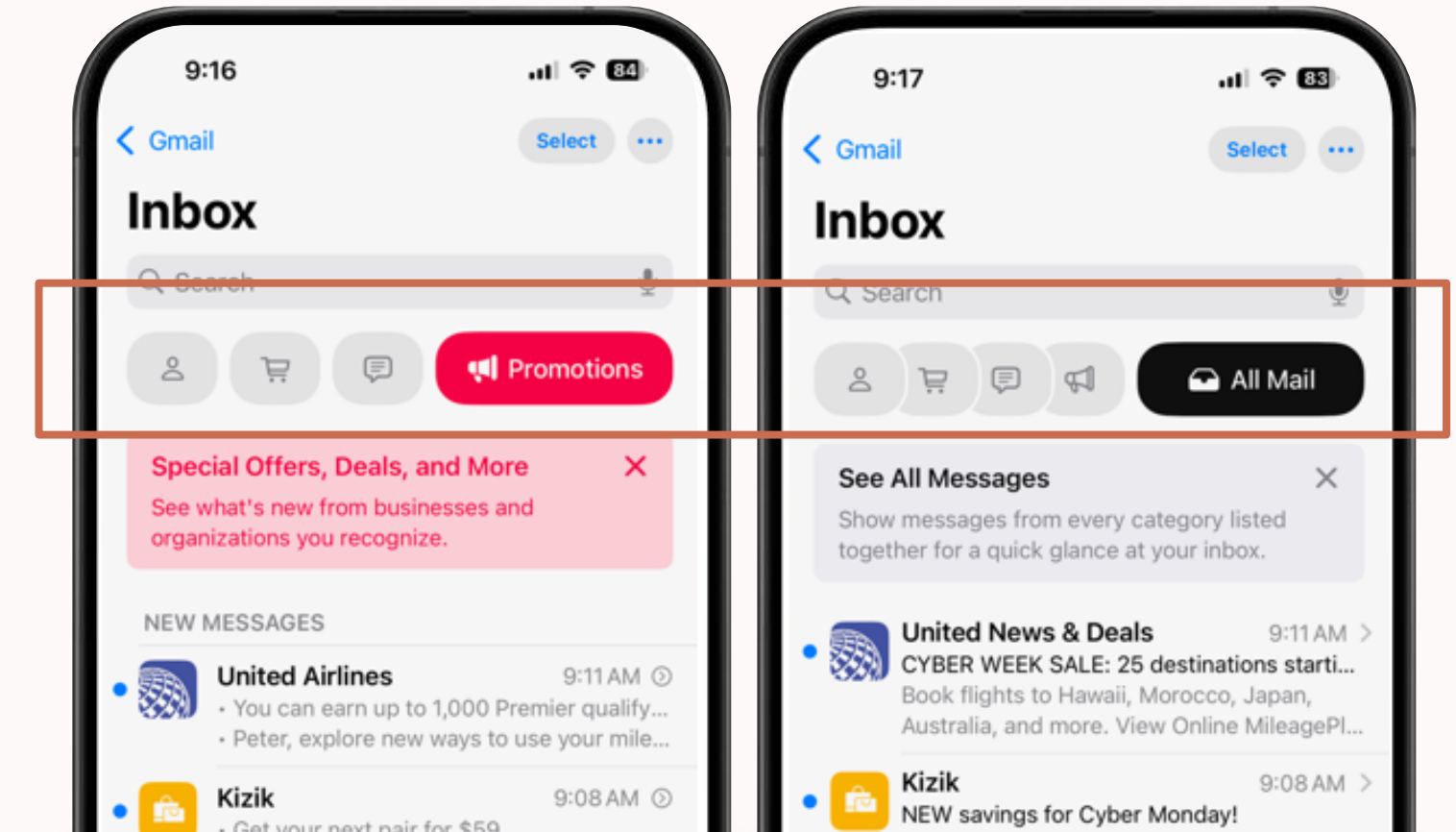
Summary of changes impacting email



Apple Mail Changes: Tabs

Overview

- Gmail was the first to debut a tabbed inbox in 2013
- Apple Mail now has four tabs: Primary, Promotions, Updates, and Transactions
- "All Mail" option – shown (right)
- We expect this could impact open rates but have a much more muted impact on down-funnel KPIs like responder rates and conversions
- Users can turn them off, but they're on by default. Roughly half of Gmail users keep tabs on



Apple Mail Changes: Messages

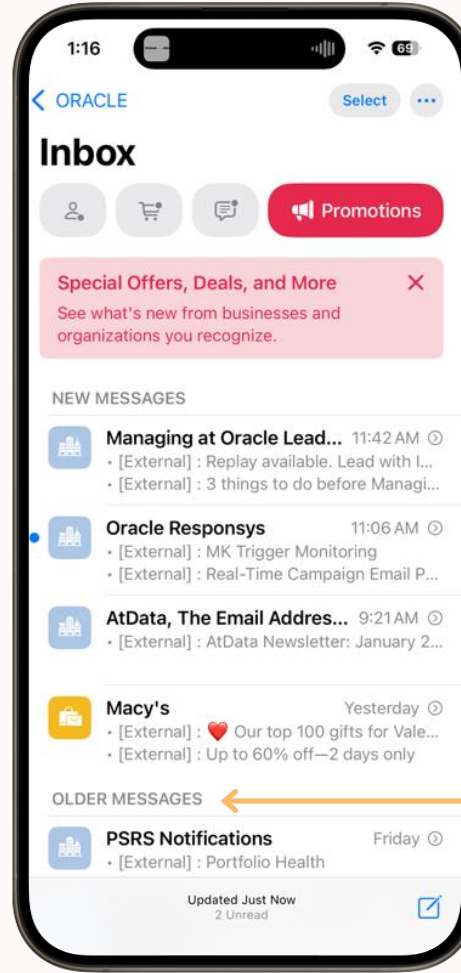
Overview

Most brand emails will likely appear on the 'Promotions' Category (Similar to what we see on Gmail Promotions Tab).

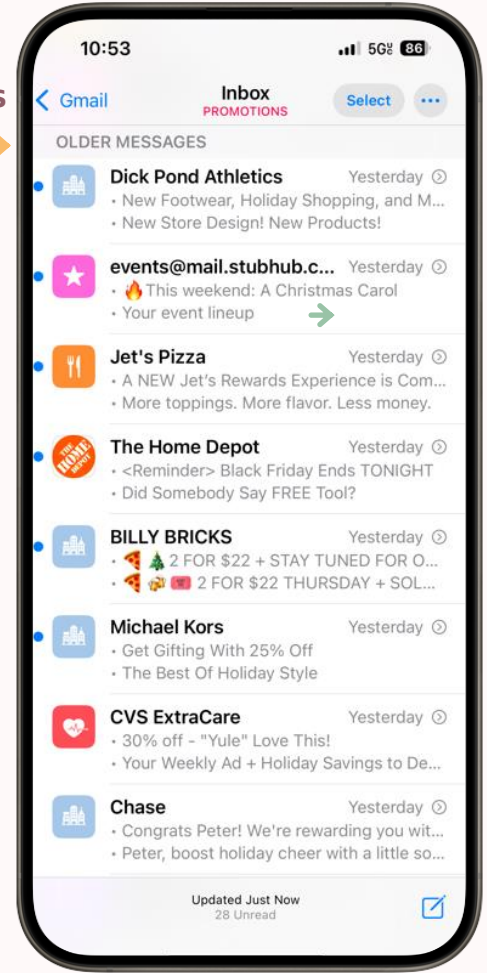
'New messages' which have not been seen previously will be pushed/grouped near the top of the inbox across each category.

Even if previous messages went unread, if they have been "seen" via an inbox opening, they are pushed down to 'Older Messages' upon the next inbox open

New Messages



Older Messages



Older Messages



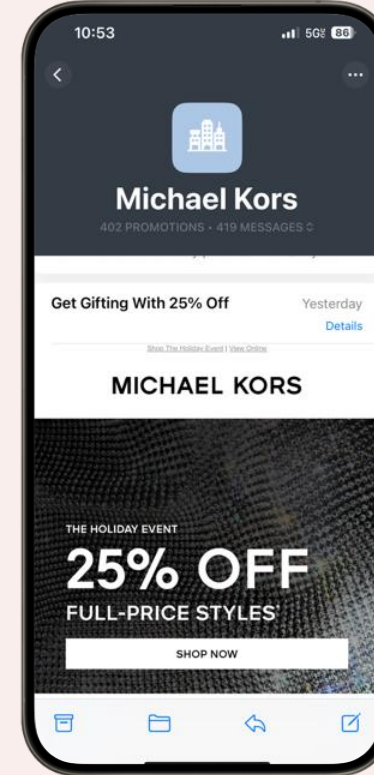
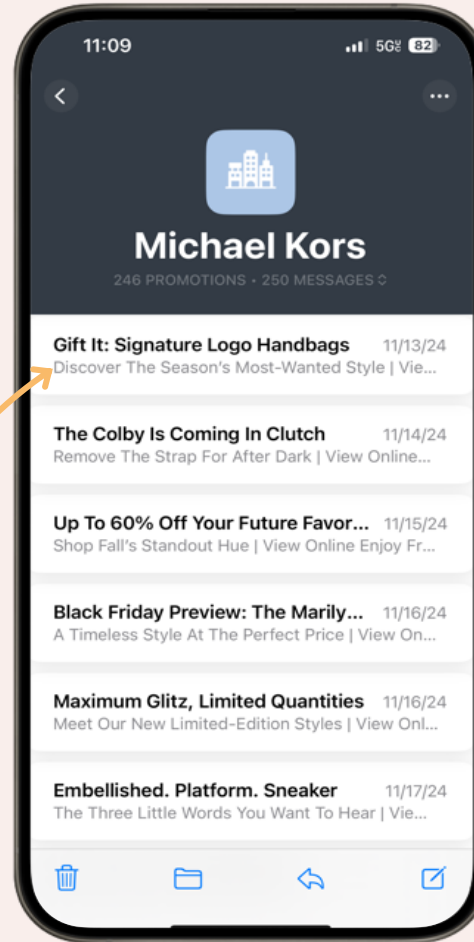
Brand Message Grouping

Message Grouping' buckets all emails from a sender into single location (you will no longer see multiple emails from a brand when scrolling your inbox).

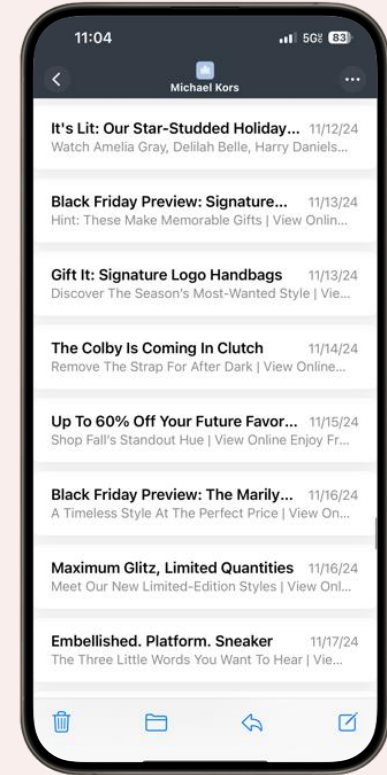
When opening an email from that brand, you can scroll down to see/view the recent email or swipe up to see a historical list of emails from that same Brand (going back years).

The very top of the Brand Group also has stats around the number of brand messages (varies based on email type- showing promotions or transactions).

This feature pushes email content down further "below the fold" and also adds an additional click to the experience in order to see email content.



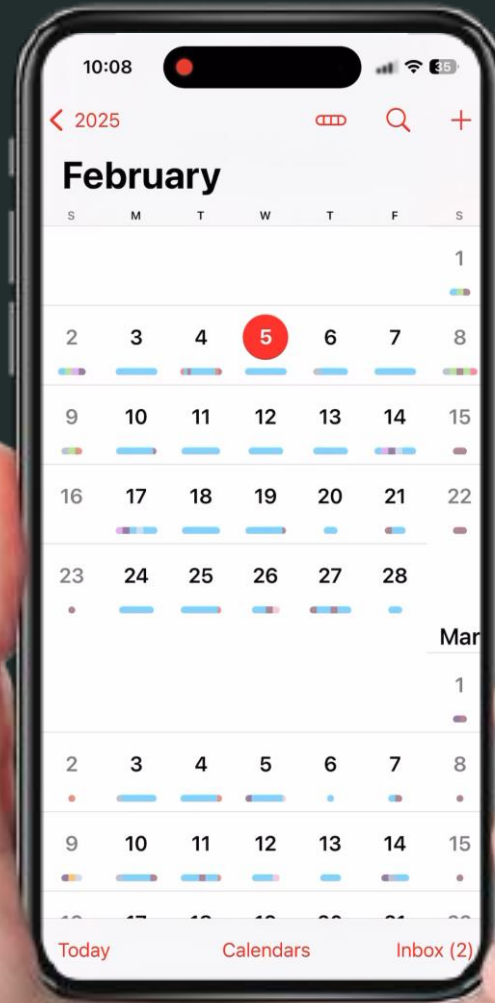
Brand grouping shrinks after scroll, turning into a sticky header throughout further navigation



The brand grouping opens/defaults back to the last time you engaged with that brand—meaning initial content seen could be days, weeks, or even months old—one of the most concerning aspects of this feature which impacts the subscriber experience



Message Grouping Functionality



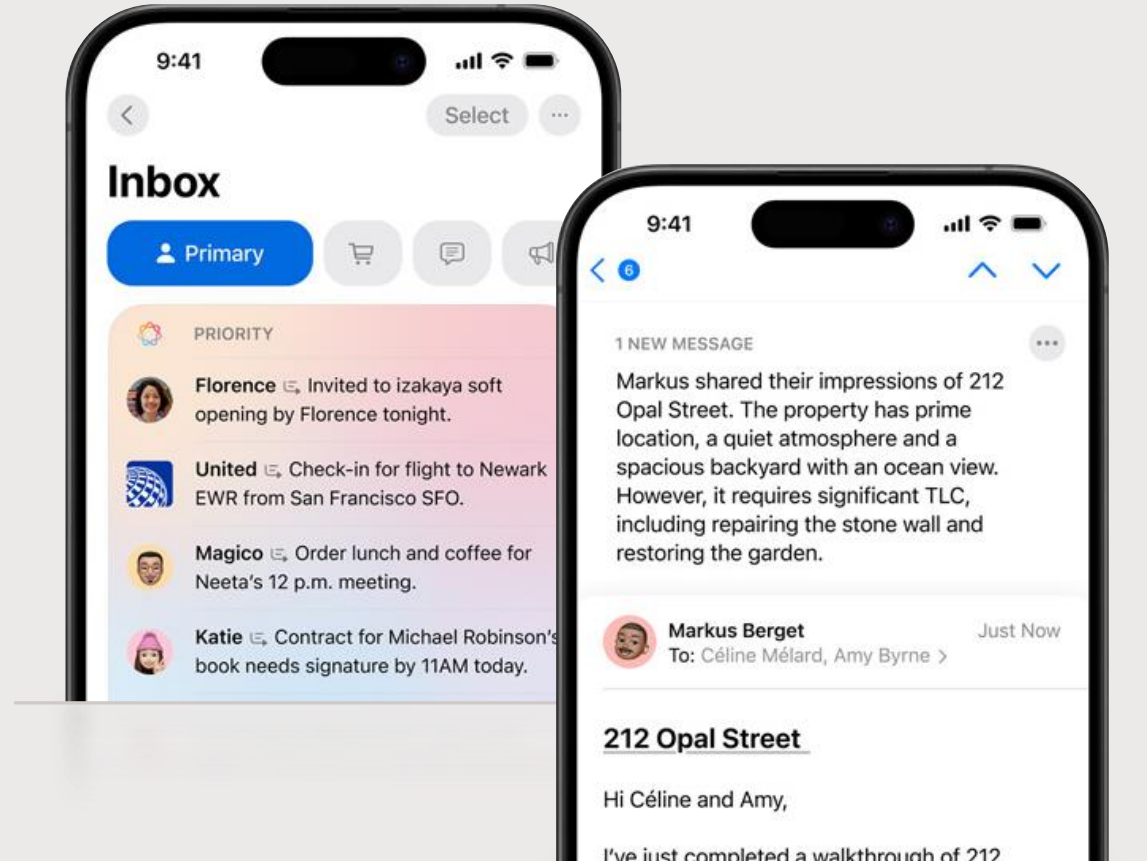
Apple Mail Changes: AI Summaries

Apple Intelligence functionality in the Mail app can provide a quick summary from the list view without even having to open the email.

This appears to be on by default and will replace marketer-written preview text.

Opened emails can also be summarized with a click of a button.

Unread emails in each category will float to the top, while read emails will get buried.



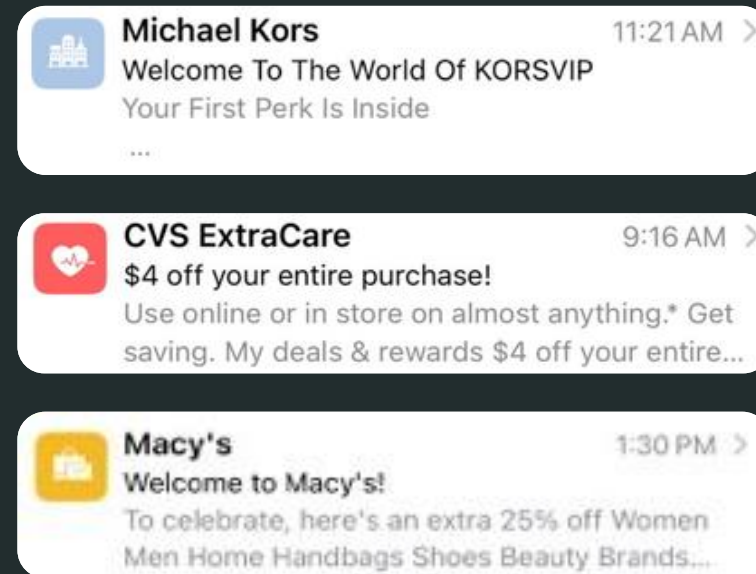
AI Summary Replaces Pre-Header

AI summaries will be enabled by default on the pre-header for the newer Apple devices (15+) who have access to Apple Intelligence.

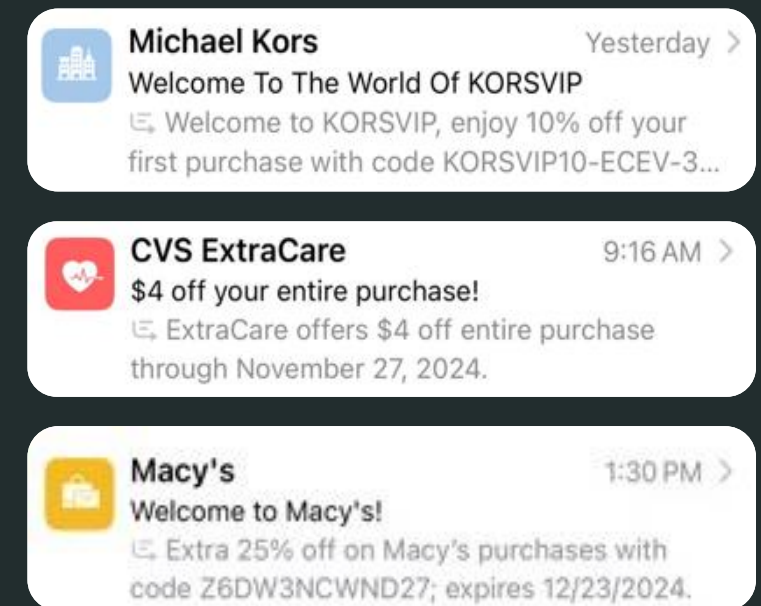
This AI summary will replace the text in the pre-header, which could have a bigger impact on marketers who rely on the pre-header for important content.

In the example at right, the AI summary of the pre-header essentially duplicated the Subject Line Messaging.

Standard Pre-Header:



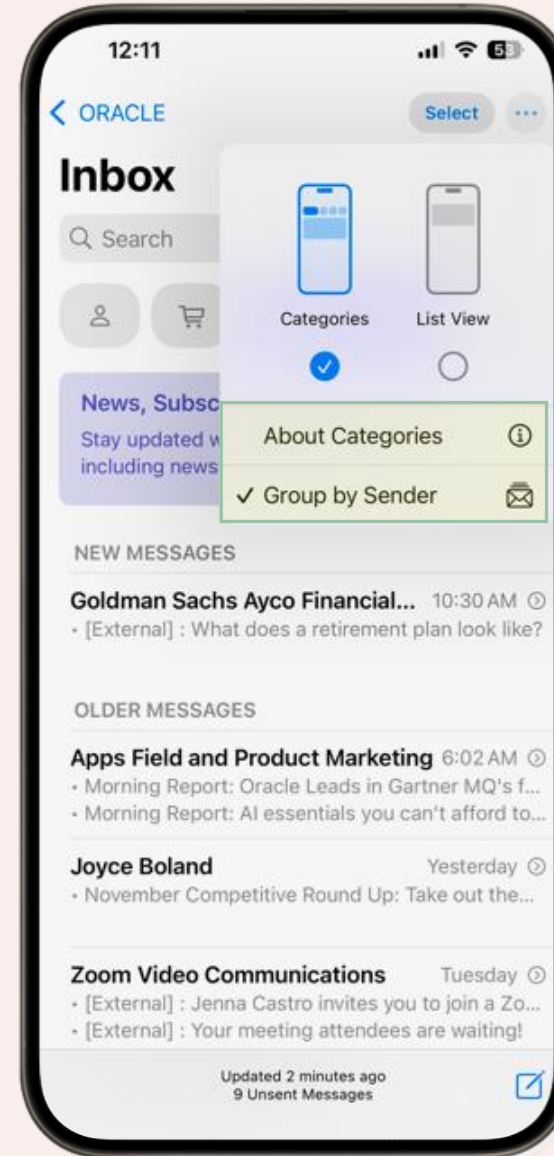
AI Summary:



Good News

iOS 18.5 makes “disabling” or “change back” easier

- Message grouping is turned on by default for all users. But if users don't necessarily “love” Apple category (tabs) or message grouping they can turn it back to list view
- Before these options were only available in the Settings App, now in Mail App itself making it easier to find
- Includes disabling categories/tabs, hide contact photos, AI priority messages, and grouping by sender.
- Turning off Group by Sender only applies to the inbox you're currently in.



“More Options” Menu

“Group by Sender”



Apple Mail Performance Implications and Concerns

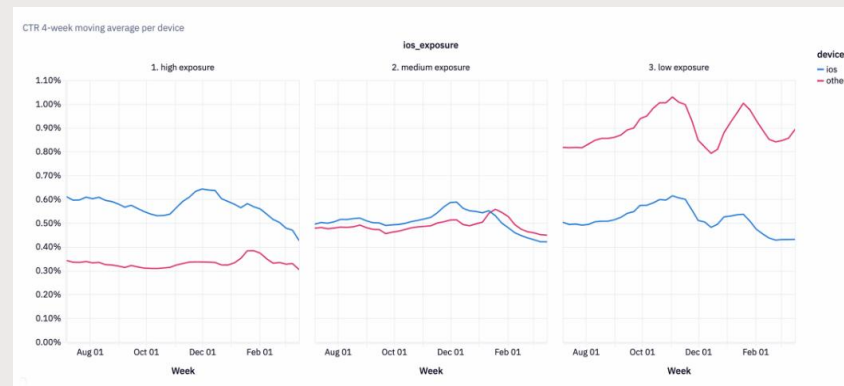
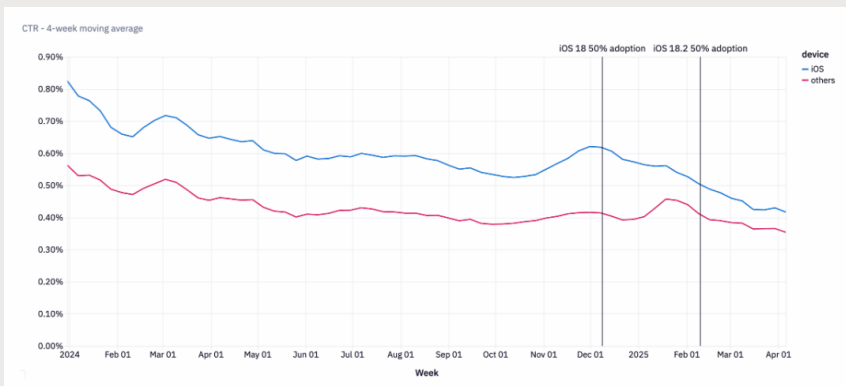
Is iOS 18 impacting email performance given it's marketshare?



High iOS Exposure, Big Email Loss

Across a sample of 100's of senders, they were segmented into 3 groups by their percentage of iOS clicks over total clicks prior to the iOS 18 launch

1. High exposure - over 60% of iOS clicks
2. Medium exposure - between 40% and 60% of iOS clicks
3. Low exposure - less than 40% of iOS clicks



Recommendation # 1

Activate BIMl and Apple Branded Mail Profile (via Apple Business Connect) - this will ensure your logo replaces the generic icon next to your emails and will help emails stand out

Source: <https://www.linkedin.com/pulse/ios-18-impacting-emailits-trade-war-marketers-matters-ryan-deutsch-2nkzc/?trackingId=NXGqP3AKSiqQd7U92lv86A%3D%3D>

“ iOS 18 is impacting email...it's no trade war, but for marketers it matters...”

“ ...driving traffic from the email channel down by as much as 25%.”



Recommended Next Steps

1

Implementation of Apple Mail Branded Logo

Work with Apple Business Connect to insert your 'Branded Mail' logo within the Apple Mail Client



2

Continue Following Creative Best Practices

While it remains to be seen what the penetration will be for 'AI summary' in email, ensuring all emails use HTML text allow for AI summary translation will ensure a positive subscriber experience



3

Augment Subject Line + Pre-Header Strategies

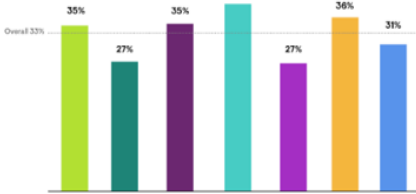
AI Summary in Pre-Headers will be turned on by default so will see a higher initial usage & impact. Ensure subject lines are clearly focused on the email value prop and aren't reliant on the pre-header for understanding



4

Ongoing Performance Monitoring

Recommend monitoring / comparing performance by Operating System to better see granular performance impact(s)



BIMI & Apple Branded Mail

Do you really need both?





QUESTION

What are they?

ANSWER

Email branding techniques that display a sender's logo in the inbox to enhance brand visibility and recognition.





QUESTION

Why should we implement them?

ANSWER

Implementing both provides comprehensive branding and security benefits and improved open rates.



In today's digital landscape,
email security and authenticity
are more important than ever
for consumer trust.



Overview: BIMI was here first...

On average, a person receives approximately 121 + emails per day.

The email landscape is continuously getting hammered with phishing attempts and spam, and marketers are always trying to find ways to rise above the fray.

The email industry and marketers got their wish with BIMI (Brand Indicators for Message Identification) and Apple's Branded Mail.

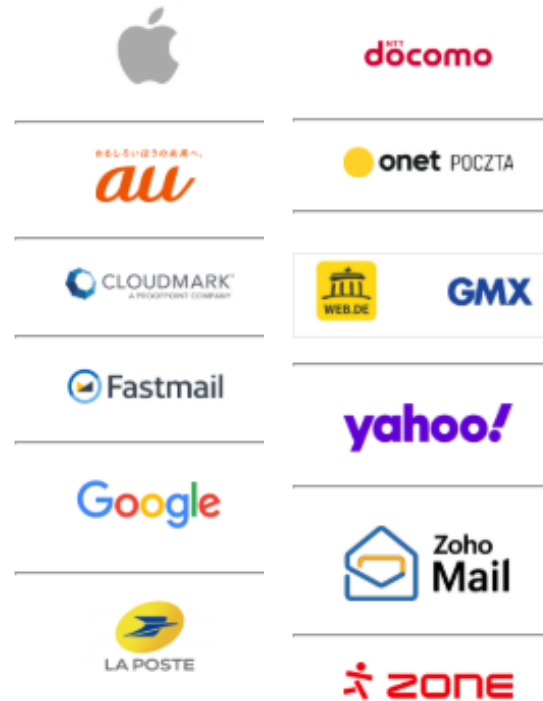
- For the email industry, it is a method to help Marketers adapt email authentication such as DMARC
- For Marketers, it allows their email to stand out
- BIMI and Apple's Branded Mail helps users distinguish genuine emails from impersonators



BIMI requirements & who participates

- Authenticate your sending domains with SPF, DKIM, and DMARC
- At a minimum set your DMARC policy to “quarantine”
- Produce a SVG Tiny PS version of your company’s official logo
- Acquire a Verified Mark Certificate (VMC) or a Common Market Certificate for your logo
- Publish the BIMI record for your domain in DNS

Supports BIMI:



Considering:



No Support:



Apple “ecosystem” branding

Verified Brand Logos

Verifying your logo in your Apple Business Connect account enables not only Apple branded Mail but also verified logo branding within Apple’s entire ecosystem

Apple Business Connect

Apple’s method of increasing consumer trust by verifying logos with legitimate companies so incoming calls, payments and emails all have trusted logo vs. fraudulent versions of phishers pretending to be a brand



BIMI vs. Apple Branded Mail

BIMI: alone is not enough

BIMI (Brand Indicators for Message Identification) is a broader industry standard since 2019 to promote DMARC adoption

Email receivers/platforms that participate: Gmail, Yahoo, small senders

A way for brands to publish their logo next to their authenticated emails in hopes of boosting open rates

BIMI helps users distinguish genuine emails from impersonators

Gmail and Yahoo make up 76% of a typical B2C list.

Apple Branded Mail: both are needed

Apple Branded Mail is specific to Apple Mail App and integrates with Apple's Business Connect ecosystem...it's just Apple

Apple's Branded Mail ensures that your logo is visible directly in the inbox, enhancing brand visibility and recognition right from the start.

Apple's Branded Mail is free to use once you register for Business Connect, allowing you to set up and customize your brand at no additional cost.

Much like BIMI, early adopters will reap the benefits.

Embracing Apple's Branded Mail can enhance your brand visibility and foster stronger relationships with your customers, positioning your business for success in a competitive landscape.

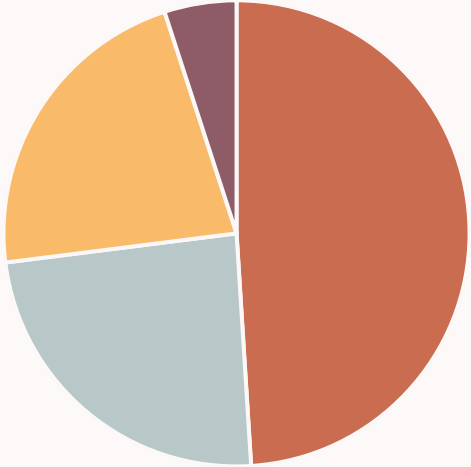


Scope of impact

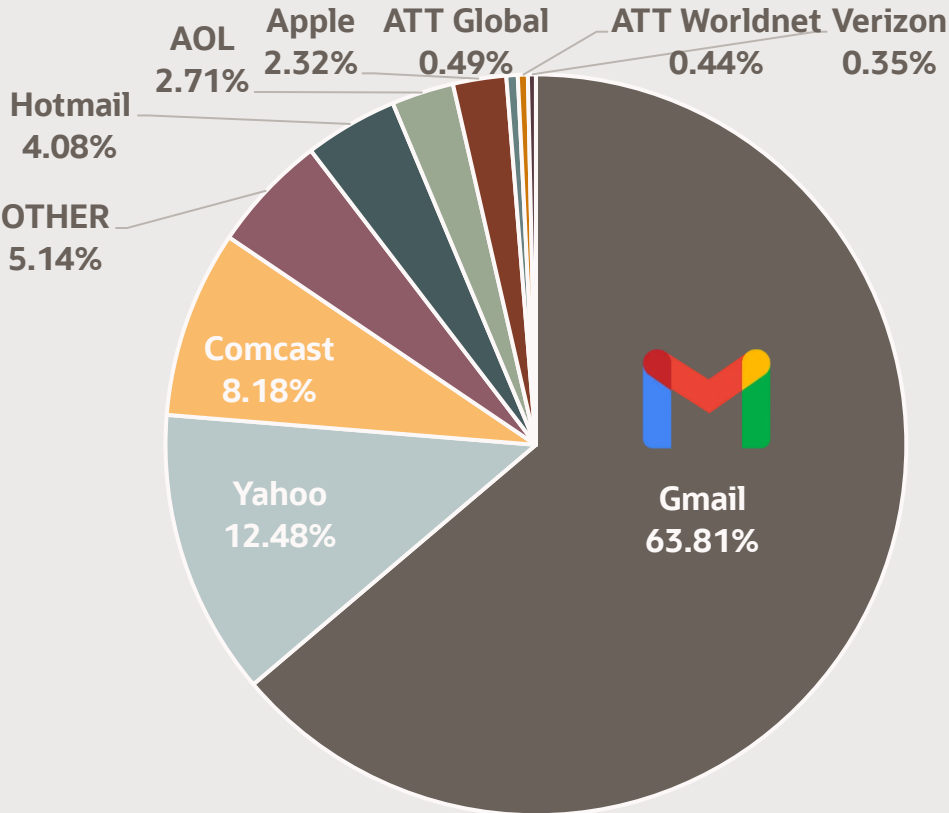
Boosted Brand Visibility

Apple Branded Mail and BIMl implementation would increase verified logo brand exposure for 76% of a typical B2C file (Gmail + Yahoo) when recipients view emails in their Apple Mail App

Engagement Share by Operating System



■ Apple ■ Google ■ Windows ■ Other



Requirements

BIMI Requirements

2019

- Authenticate your sending domains with SPF, DKIM, and DMARC. At a minimum set your DMARC policy to “quarantine”
- Produce a SVG Tiny PS version of your company’s official (trade marked) logo
- Acquire a Verified Mark Certificate (VMC) or a Common Market Certificate for your logo
- Publish the BIMI TXT record for your domain in DNS

Apple’s Requirements

2024

Company verification:

- Company ID / Government ID. Require company’s federal taxpayer identification number (in the US) or business license
- Domain verification: add a TXT record to corporate domain or brand domain
- Produce a SVG, HEIF, JPEG, or PNGs logo or photo
- It can take 5 business days or more for Apple approval

Part 2: Branded Mail

- Each domain or subdomain must have either MX, A or AAAA
- DMARC with “p” value set to “quarantine” or “reject”
- Publish new TXT record for sending domain/ subdomain - verify within 14 days
- Each domain and/ or subdomain must be approved by Apple
- Limits: A brand cannot have more than 100 domains, subdomains, and email addresses

Brand Concerns

Adoption is slow because:

- Do I understand all the requirements?
 - What are the steps and the order of the steps?
- Approval for which logo to use
- Do I need to involve Legal? Do I need to involve Finance? or Both?
- Which IT departments handles DNS? How many times do I need to keep going back to them?
- Do I need to involve the Design department?
- Who else do I need to involve?



Business Connect Location

Adding a location allows customers to find your business in Maps.

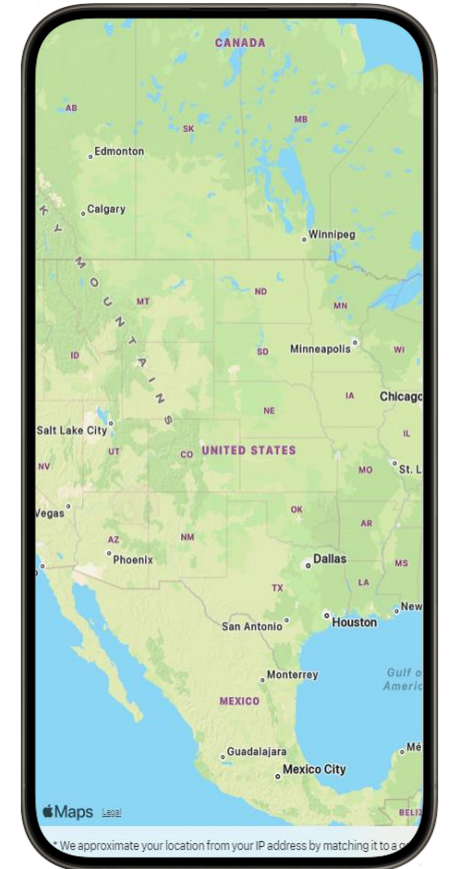
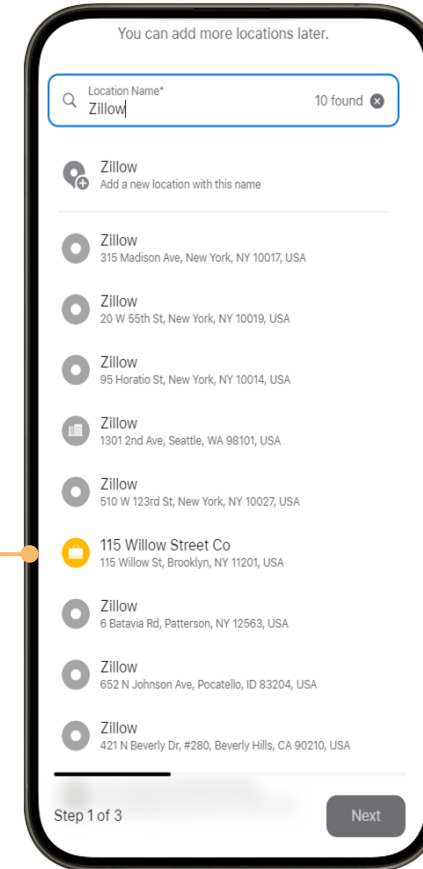
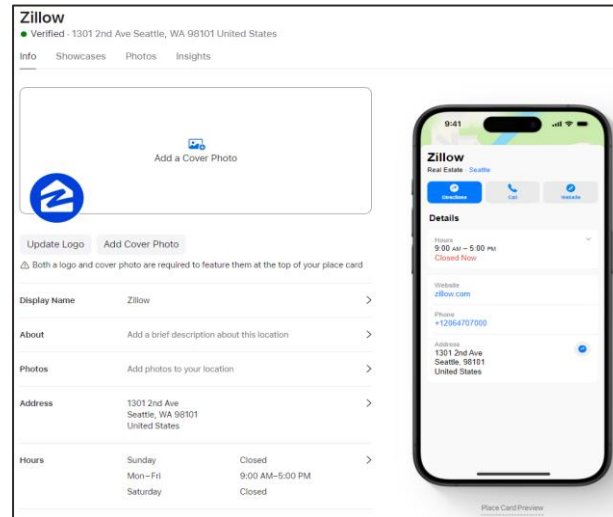
This feature is best for business that operate a physical location.

Adding a location is a 4 step manual process for each location:

- Location name
- Confirm address
- More detail information such as website or hours of operation
- Choose Brand

Logos will be dropped if location and brand categories don't match.

Apple approximate the location based on IP address by mapping it to a geographic location.



Issues experienced by Brands with Apple Business Connect

Little to no support

Documentation is vague, and confusing. “Brands” and “Branded Mail” are not clearly defined.



Many believe they require a separate Apple Business Connect account for each of brand.







Sudden unexpected failures

Apple claims you can match subdomains to another brand or brand logo.

No transparency if an issue is a bug or if it is intentional.

Support is very difficult to find and may takes a long time to get a response that is helpful and effective

Brands		
Status	Access	
Name ↑	Status	Access
 Zillow	● Verified	Not Shared
 Zillow Home Loans	● Verified	Not Shared

Branded Mail			
Status	Brand	Type	Access
Domain/Email ↑	Status	Brand	
lendingteam@zmail.zillowhomeloans.com	● Verified	 Zillow Home Loans	
mail.zillow.com	● Verified	 Zillow	
update.zillowhomeloans.com	■ Not Approved	 Zillow	
zillow.com	● Verified	 Zillow	
zillowhomeloans.com	■ Not Approved	 Zillow	
zmail.zillowhomeloans.com	■ Not Approved	 Zillow	



Tap to Pay on iPhone

- This feature allows your brand to display your brand in the Tap to Pay on an iPhone.
- This feature is not for every business.
- Reduces the need for card readers and terminals.
- Customers can pay with debit/credit cards, Apple Pay and other digital wallets.

Implementation:

Enable Tap to Pay in the payment app of your choosing on your iPhone



Apple Business Connect Requirements

It is all about customization

- Add your locations
 - Allows you to customize the information that displays your location to map users
- Set it up Branded Mail
 - Display your brand logo for one or more domains
- Show your brand on tap to pay on iPhone

The image displays two screenshots of the Apple Business Connect interface. The top screenshot shows the 'Branded Mail' settings page with a list of domains and their verification status. The bottom screenshot shows the detailed view for a verified domain, including a mobile phone preview of the branded email.

Domain/Email	Status	Brand
lendingteam@zmail.zillowhomeloans.com	Verified	Zillow Home Loans
mail.zillow.com	Verified	Zillow
update.zillowhomeloans.com	Not Approved	Zillow
zillow.com	Verified	Zillow
zillowhomeloans.com	Not Approved	Zillow
zmail.zillowhomeloans.com	Not Approved	Zillow

Branded Mail

lendingteam@zmail.zillowhomeloans.com
Verified

Email: lendingteam@zmail.zillowhomeloans.com

TXT Record: TXT records are not needed for email addresses.

Brand: Zillow Home Loans (Go to Brand)

Remove: Remove

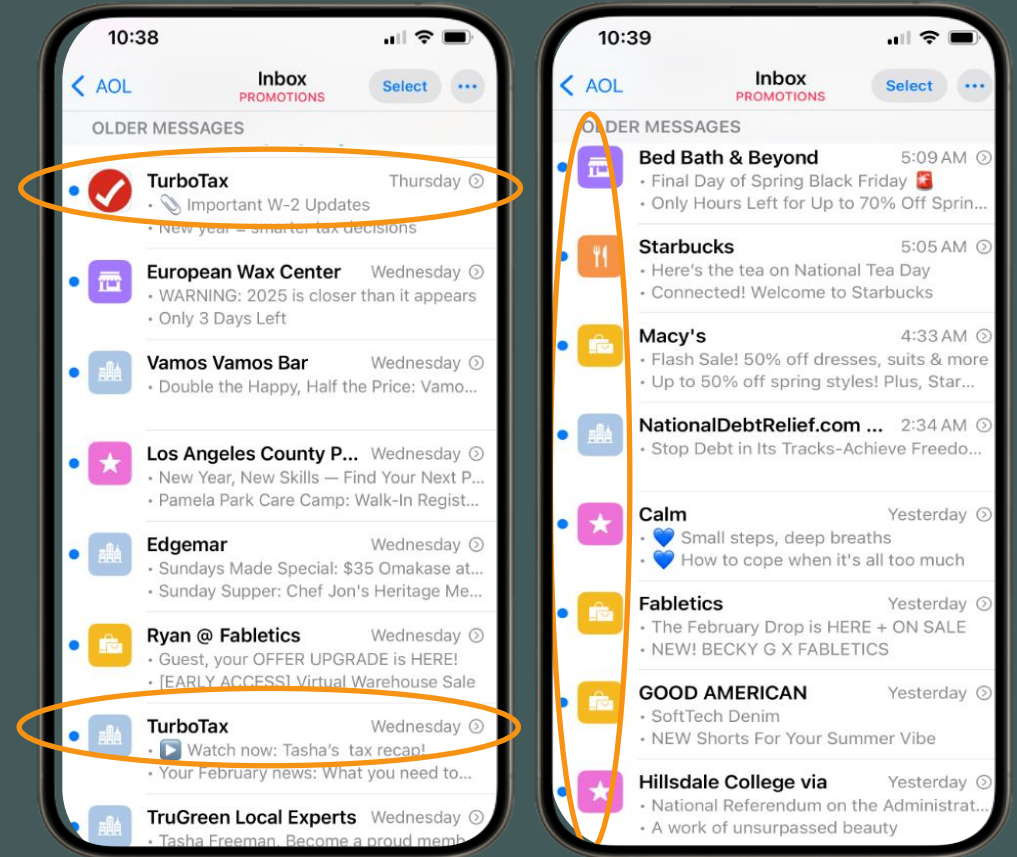
Branded Mail Preview



Challenges with Apple Branded Mail Implementation

Many brands have reported several issues with getting Apple branded Mail set up

- Finding the person within your organization that has access to Apple Business Connect can be a challenge in and of itself
- Apple requires proof you are in fact the company you say you are by providing a utility bill etc.
- Once you verify a domain or email address and upload the logo, it doesn't always work
- And sometimes it works and then stops working
- Support is very difficult to find and then takes a long time to get a response that is helpful and effective



Sample of Turbo Tax using Apple branded Mail up top but then down below another Turbo Tax email without the logo? Which one should recipient "trust" is Turbo Tax?

Being an early adopter could help your email stand out and rise above the generic logo's seen for everyone in the inbox.




Summary: Give it a try

Despite the challenges...implement BIMl and Apple Branded Mail

In today's digital landscape, email security and authenticity are more important than ever for consumer trust.

Implementing both provides comprehensive branding and security benefits and improved open rates.



“We’re excited to offer all businesses — including those without a physical location — the ability to create a brand that appears across the Apple apps that over a billion people use every day. We designed Business Connect to empower businesses to present the best, most accurate information to Apple users. With today’s updates, we’re helping even more businesses reach customers, build trust, and grow.”

David Dorn

Apple’s Sr. Dir. of Internet
Software and Services
Product



Q & A



Thank You

ORACLE

