



2018 State of Email Service Providers

Understanding ESP industry consolidation, the top ESPs by sector, and the most popular ways to boost ESP functionality

A marketer's email service provider is the cornerstone of their email program. It's their most critical tool and a major budget item.

But frustrations run high. Marketers told Litmus that limitations with their ESP was third on their [list of biggest challenges for 2018](#). And 16% of brands said that changing ESPs was on their [list of email marketing priorities for 2018](#).

In our first ever State of Email Service Providers report, we take a detailed look at the ESP marketplace to better understand...

The pace of consolidation in the industry, and its causes	5
The trends that will shape the future of the ESP landscape	13
The top ESPs by geography, company size, industry, and characteristic	14
The tools and functionality provided by ESPs	22

Use the results to better understand the marketplace and your options, as well as the ways that you can boost the functionality of your current ESP.

All of this is made possible by the nearly 3,000 marketers who generously took the time to take our 2018 State of Email Survey and share their insights with the industry. For a breakdown of the demographics of our respondents, check out [A Snapshot of the Email Professional](#).

Now, let's understand the ESP marketplace better!

State of Email Survey Research Series

Now in its third year, Litmus' State of Email Survey has led to unprecedented insights into all facets of email marketing, including production, design, deliverability, budgeting, salaries, and much more. Improve your email program by learning from thousands of other brands.

[See all our State of Email research →](#)



Key Takeaways & Action Items

Email service providers are the foundation of the email industry. Here are our top tips from the 2018 State of Email Service Providers report to help you understand the industry better and get the most out of your ESP:

- 1. Learn how ESP industry consolidation is affecting companies your size and in your industry.** It isn't affecting all companies' ESP choices equally. See a breakdown of ESP consolidation across a variety of sectors on [page 6](#).
- 2. Consider moving off your homegrown email platform.** The usage of custom, in-house email platforms is declining rapidly. The percentage of brands using one has fallen 44% over the past two years to just 6%. Competitive options without the hassle of upkeep appear to be driving these users to move to traditional ESPs. See a discussion of this trend on [page 9](#).
- 3. Find out the trends that will reshape the ESP landscape.** Just like email marketing is always evolving, the ESP landscape is constantly shifting as well. In addition to functionality, pricing, expansions, and acquisitions, we highlight a few issues that will likely help determine the winning ESPs of the future. Learn about the issues on [page 13](#).
- 4. Understand the audiences that various ESPs serve best.** Simply put, every ESP is different, with different strengths and weaknesses. See which ESPs are the most popular among businesses in different regions of the world, of different sizes, in different industries, and more on [page 14](#).
- 5. Discover which third-party tools can improve your ESP.** Sending email is the core function of an ESP. Everything else is non-core, which is why most brands use third-party tools to supplement the native functionality provided by their ESP. See which kinds of third-party tools are the most popular on [page 23](#).

Litmus Works Where You Work

No matter what ESP you use, Litmus seamlessly integrates into your workflow. Join more than 250,000 marketing professionals who use Litmus to get high-performing email campaigns out the door, faster.

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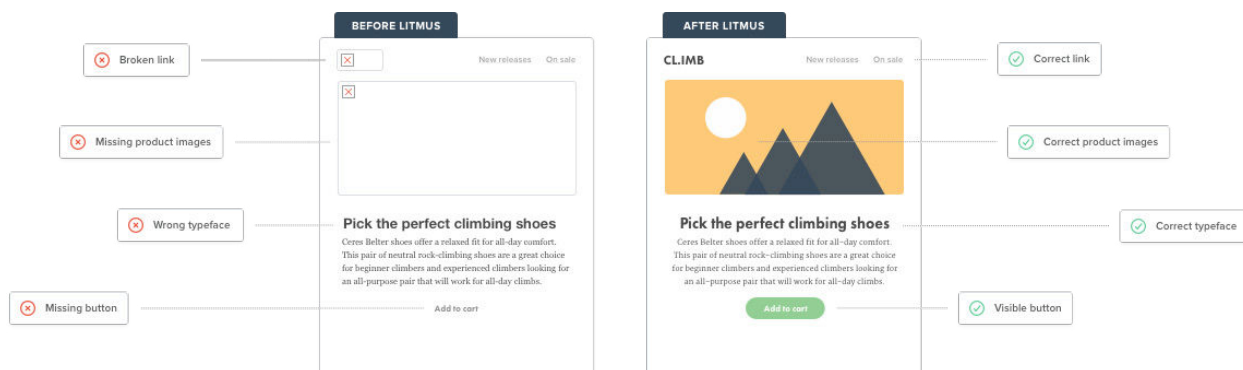


Who Is Litmus?

Litmus is passionate about email marketing research, because our mission is to help brands get access to the knowledge and tools they need to send better email. Through our industry-leading [blog](#), [Litmus Live conferences](#), [ebooks](#), [webinars](#), [Email Design Podcast](#), [Community](#), and more, we discuss best practices and explore trends to help your team stay on the forefront of the industry.

We are also passionate about software that makes creating high-performing email easy. Marketers use Litmus alongside their existing email service providers to ensure a consistently great brand experience for every subscriber, work more efficiently, accelerate campaign performance, reduce errors, and stay out of the spam folder.

Email marketing is complex. But through hands-on advice and software you can trust, we enable your team to do their best work—creating innovative, on-brand campaigns that engage and delight audiences. With the [Litmus Email Creative Platform](#), you'll have the tools and insights you need to provide your customers with an incredible email experience—and get the best results in return.



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Industry Consolidation & Its Causes

While brands continue to have over two hundred email service providers to choose from, the ESP industry continues to show clear signs of consolidation.

For example, the top 10 ESPs used by our respondents now have nearly 63% market share, up from 58% in 2017 and 56% in 2016. Also, just 21 ESPs have at least 1% market share among our respondents, down from 22 in 2017 and 27 in 2016.

At the current rate of consolidation, the top 10 email service providers will control more than two-thirds of the overall market by the end of 2019.



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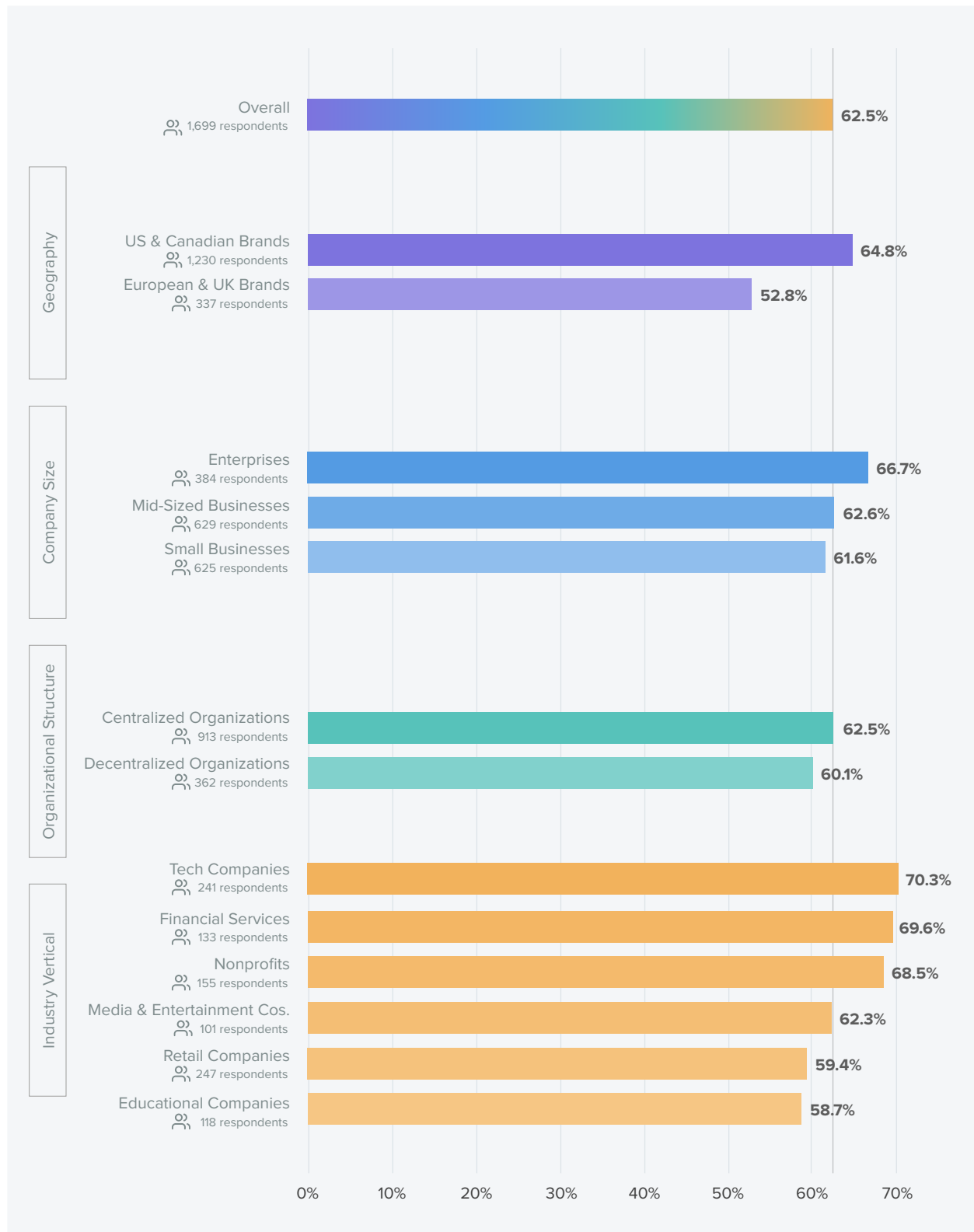
However, because different ESPs appeal to companies in different regions, of different sizes, and in different industries, the strength of consolidation varies. For instance, the European and UK market is among the most competitive, with the 10 most popular ESPs there controlling only 53% of the market.

Given the extra requirements of large enterprises, it's no surprise that the 10 most used ESPs in that market have 67% market share. Small businesses have considerably more choices that meet their requirements.

The technology industry was among the most consolidated, with the 10 most popular ESPs used by tech companies controlling more than 70% of that market. The 10 most used ESPs among financial services companies and among nonprofits had a similar level of dominance in those industries.

Market Share Controlled by Top 10 ESPs

Market share controlled by the top 10 email service providers in each of the following markets



What's Driving the Consolidation

The largest ESPs are picking up more market share because of several factors, including:

- The continuation of merger-and-acquisition activity among ESPs
- The declining use of homegrown email platforms
- The decreased usage of multiple ESPs by brands

Let's look at each of these issues...

ESP Mergers and Acquisitions

As in all industries, M&A activity is a major driver of consolidation and has been for some time. For ESPs, 2013 was a milestone year. More than \$4 billion was spent acquiring ESPs that year, including the acquisition of ExactTarget for \$2.5 billion by Salesforce, of Responsys for \$1.5 billion by Oracle, and Neolane for \$600 million by Adobe. Since then, there's been a steady flow of activity.

Since 2012, there's been roughly \$10 billion in mergers and acquisitions in the email service provider industry.



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To be fair, not all this activity has caused consolidation. Many of the acquisitions have placed ESPs in the hands of tech giants and other software companies. The best examples of this are the three acquisitions we just mentioned, plus IBM's purchase of Silverpop. This has kicked off years of cross-channel integration and advances in omnichannel marketing capabilities.

Plus, private equity groups have gotten involved, including Marlin Equity Partners, Vista Equity Partners, Vector Partners, and Insight Venture Partners. Since private equity groups don't tend to hold companies long-term, most of these ESPs will eventually be back on the market at some point.

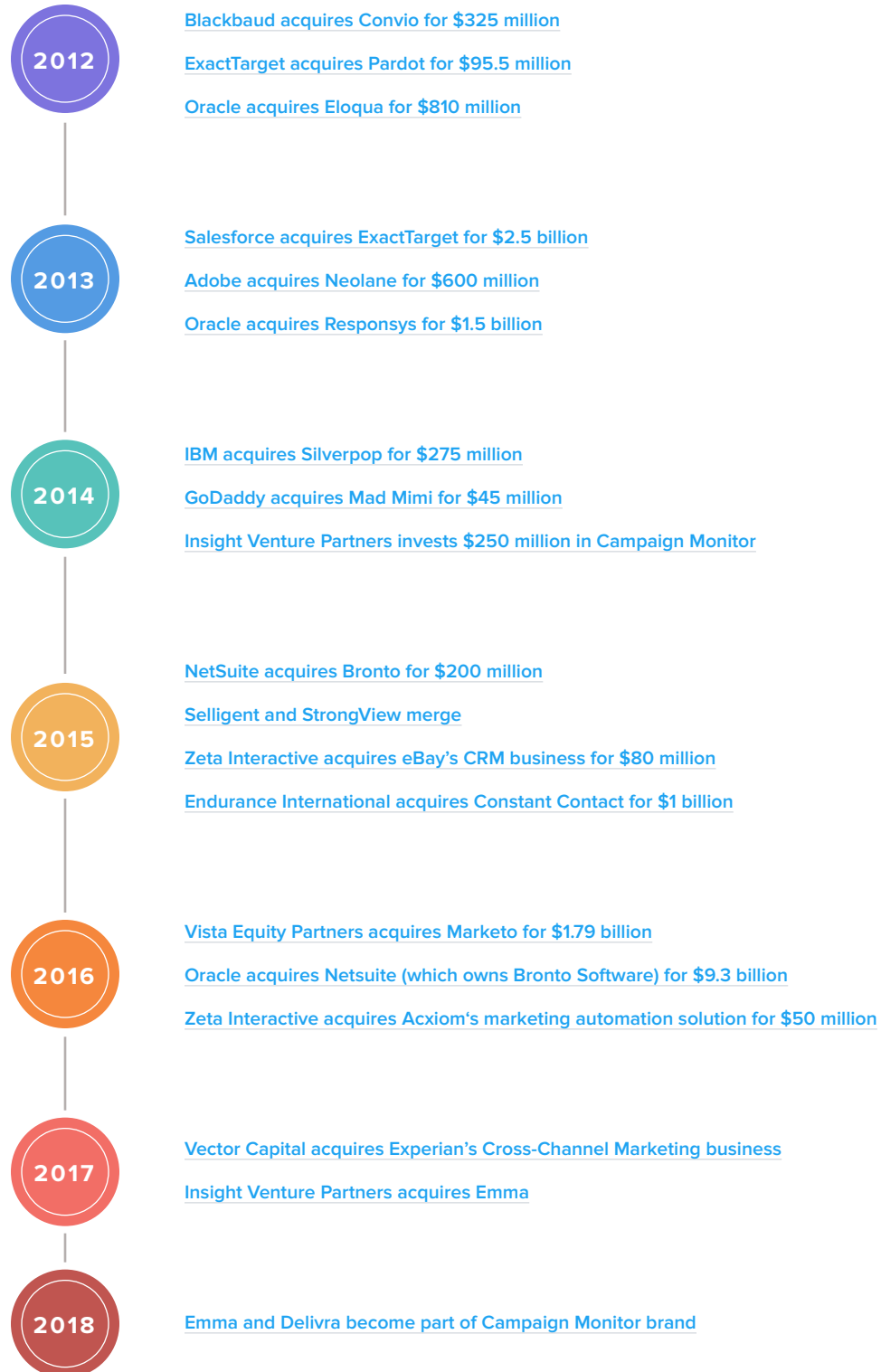
However, some of the purchases have definitely reduced the number of ESPs in the marketplace. For instance, Oracle now owns six platforms capable of sending marketing emails, all of which it acquired: Eloqua, Responsys, Bronto, NetSuite, Siebel, and Dyn.

More recently, in June of 2018, Emma and Delivra formally became part of Campaign Monitor, all three of which had been acquired or invested in earlier by Insight Venture Partners. That increased Campaign Monitor's market share from 6.2% to 8.3%, moving it from the No. 7 ESP overall up to the No. 5 spot, according to data from Litmus' 2018 State of Email Survey.

Occasionally, completely new ESPs get launched. For instance, [Squarespace entered the ESP industry](#) by releasing its own platform in June of 2018. However, doing so is increasingly rare. With so many ESPs already in existence, the buy-versus-build pendulum is very much on the buy side currently.

ESP Merger & Acquisition Activity

Highlights of major M&A activity in the email service provider industry since 2012



Declining Use of Homegrown Platforms

Part of the growth among the top ESPs has come from fewer brands using homegrown email platforms to send all or a portion of their marketing emails. Currently, 6% of brands use a homegrown, internally developed email platform. That's down from 11% in 2016.

Typically, homegrown email platforms have been used primarily to send transactional and some other automated emails, with one or more traditional ESPs then used to send broadcast, segmented, and other emails.

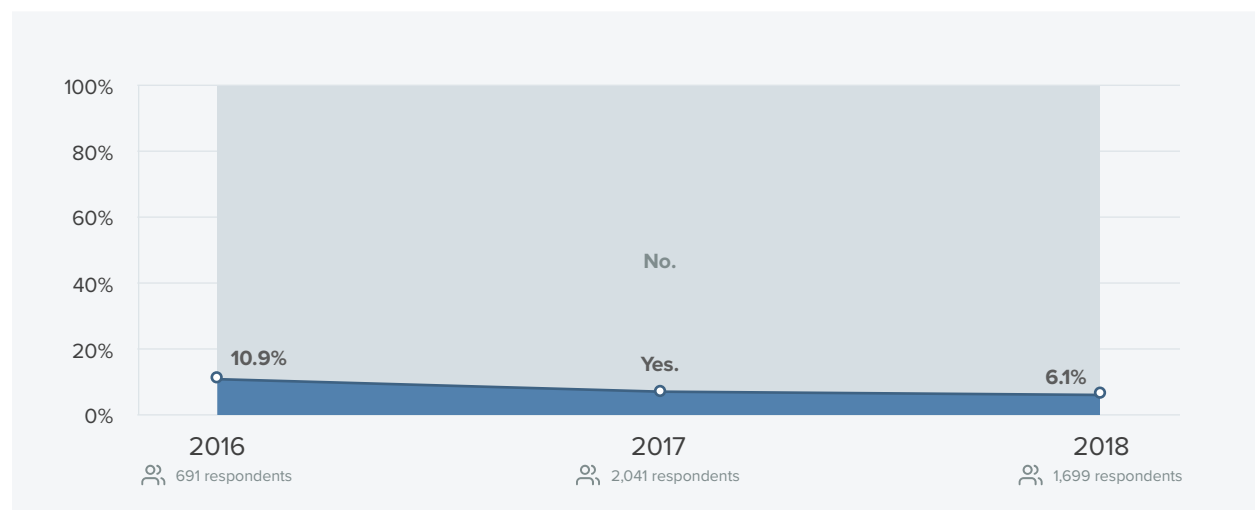
For instance, only 34% of brands that use a homegrown email platform rely on it exclusively. Brands that use homegrown platforms are 73% more likely than the average brand to use three email platforms to send their marketing emails, and 113% more likely to use four or more email platforms.

It's unclear exactly why brands are moving away from homegrown email platforms. We assumed that they would be less sophisticated than an ESP and would therefore limit success. However, our survey data doesn't indicate that brands that use homegrown platforms are any less sophisticated or successful than brands that don't. If anything, they appear to be more sophisticated and more successful. It's possible that it's the old, long-neglected homegrown email platforms that are being abandoned or replaced by traditional ESPs, so that the remaining ones are the super-sophisticated ones operated by Amazon, Uber, and similar email-savvy companies.

What is clear, though, is that brands are consolidating the number of email marketing platforms they use—because of cost, upkeep, integration, or other factors.

Use of Homegrown Marketing Email Platforms Continues to Decline

Does your company use a homegrown, internally developed email platform to send any of its marketing emails?



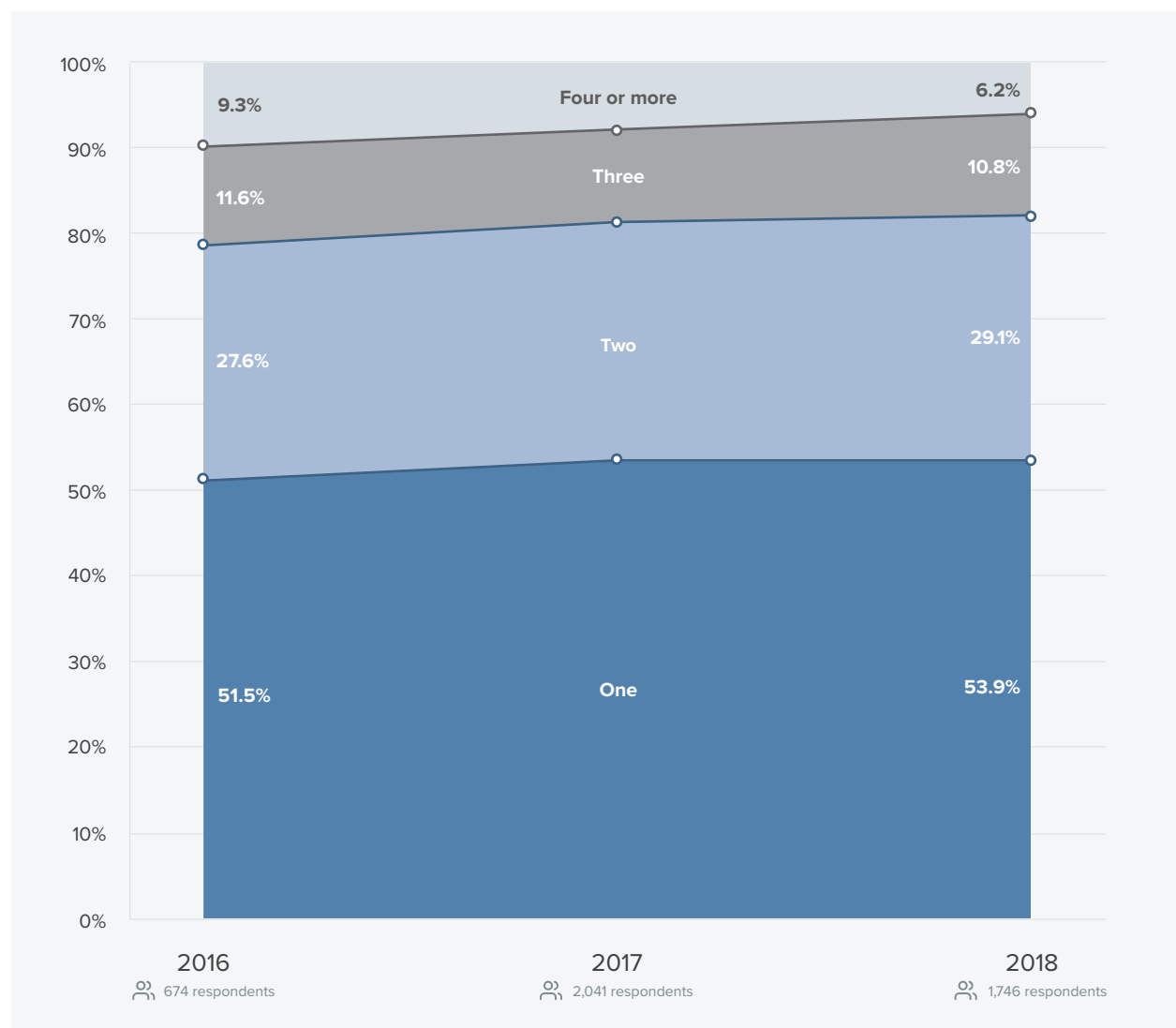
Brands Using Fewer ESPs

Brands are generally relying on fewer email platforms to send their marketing emails than they have in the past. In recent years, the number of brands using one or two email platforms has increased, while the number using three or more has decreased.

For instance, 83% of brands currently use one or two email platforms, up from 79% in 2016. At the highest end of the spectrum, the percentage of brands using four or more email platforms has fallen to 6% from 9% in 2016.

Marketers Are Gradually Relying on Fewer Email Platforms

How many email service providers (ESPs) does your company currently use to send its broadcast, segmented, triggered, and transactional emails?



What's driving the rationalization of email platforms? It's not success. Brands using one platform are just as likely as those using two or more to say that their program is successful (52% vs. 52%).

It's not resourcing. Well-resourced email programs are only slightly more likely to use three or more ESPs (17% vs. 13%).

Shockingly, it's not omni-channel integration. Brands that have email programs that are highly integrated with their other channels are actually slightly less likely to use just one ESP (44% vs. 46%).

It mostly has to do with the size and organizational structure of a company. For instance, companies with 2,000 or more employees are significantly more likely than companies with fewer than 500 employees to use two or more email platforms (49% vs. 44%).

Whether your organization is centralized or decentralized has a significant effect on ESP usage. For instance, 60% of centralized organizations use just one email platform compared to 47% of decentralized ones. Decentralized organizations are nearly twice as likely than centralized ones to use three or more platforms to send their marketing emails (21% vs. 11%).

Sometimes decentralized organizations end up using different ESPs because they have legitimately different requirements in one part of their company than in others parts. However, other times it happens because one part of the business doesn't know what the other parts are doing, or because of internal politics.

We see similar patterns here at Litmus with our own products. A large company may indicate that their Basic Litmus subscription is meeting all their needs—however, we may find multiple Basic accounts in use across several teams inside that organization. Consolidating those into a single higher-level Enterprise plan gives them more value for their money, as well as better visibility into collaboration, spending, and more.

The same can be true when you're using multiple ESPs. If you're a decentralized organization, consider doing an ESP audit, where you ask all your divisions what tools and accounts they're using to send emails to customers and prospects. Chances are that you'll be surprised by what you learn.

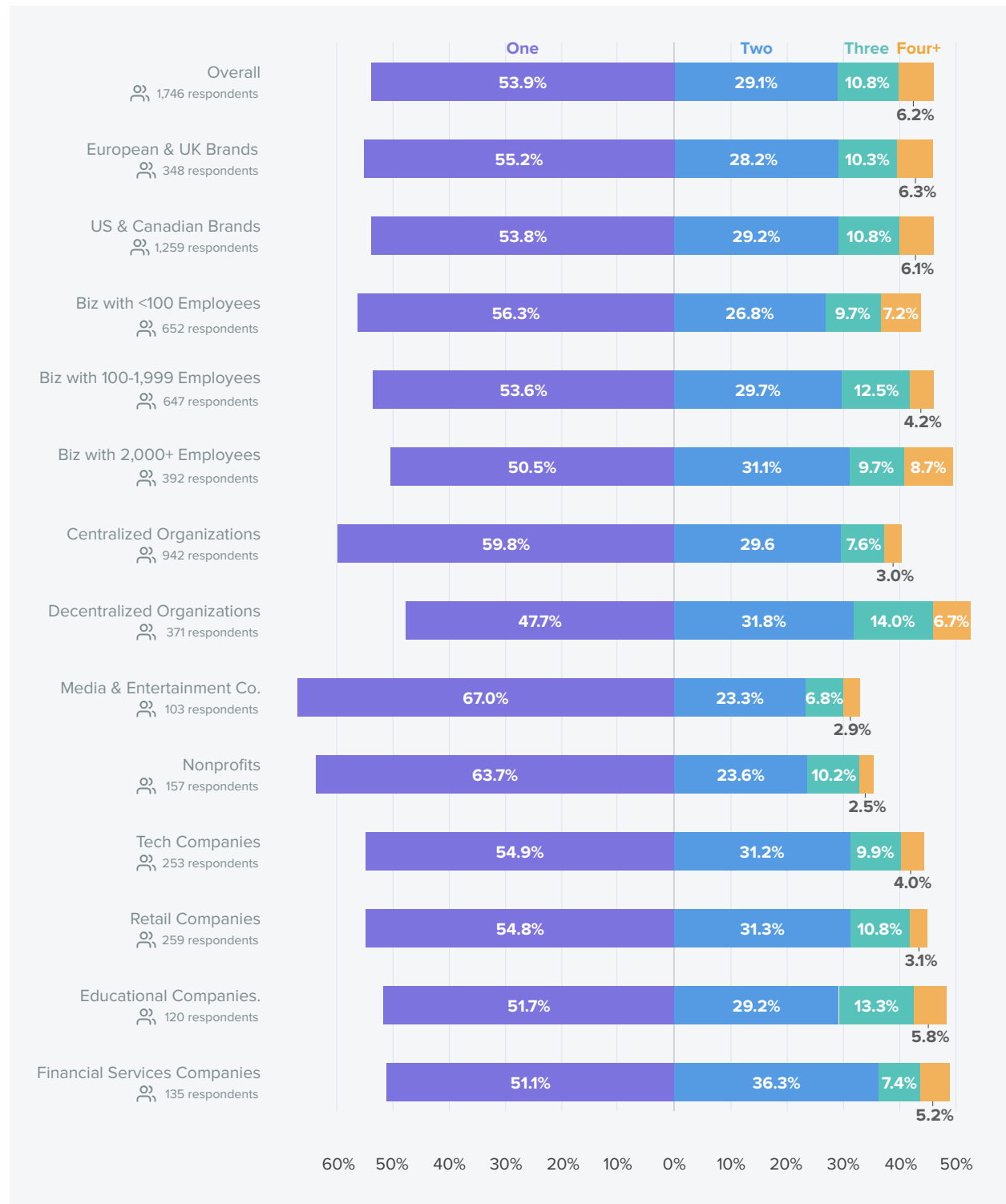


ACTION ITEMS

- ☑ Do a cost analysis of your homegrown email platform, if you have one. Also, include an opportunity cost analysis of functionality it doesn't have that you wish it did. How does that cost compare to moving that email volume to a traditional ESP?
- ☑ Do an ESP audit, especially if you're a decentralized organization. Ask all your divisions and departments how they send emails to prospects and customers. You may be able to save money or standardize the experience by reducing the number of ESPs your company uses.

More Email Platforms Used by Large, Decentralized Brands, Especially Education and Financial Services Companies

How many email service providers (ESPs) does your company currently use to send its broadcast, segmented, triggered, and transactional emails?



The Future ESP Landscape

Just like email marketing is always evolving, the ESP landscape is constantly shifting as well. Functionality, innovation, pricing, expansions, acquisitions, and other factors will determine the winning ESPs of the future. Here are a few specific issues that we think may play a role in shaping that future ESP landscape:

1. The One-Stop Shop

It started with ESPs acquiring social media marketing companies, such as when [ExactTarget bought CoTweet](#) in 2010. In time, ESPs also added the capability to create mobile apps, SMS campaigns, social media advertising, and more. The idea was to allow brands to operate and coordinate all of their marketing from a single platform.

A few years later, the idea got much bigger: to integrate marketing with sales and service and other aspects of business operations. The huge ESP acquisitions by Salesforce, Oracle, IBM, and Adobe really mainstreamed this strategy.

More recently, the push has been to unite marketing and ecommerce on a single platform. For example, [Salesforce acquired Demandware](#) in 2016 and this year [Adobe acquired Magento Commerce](#) and [Squarespace entered the ESP industry](#).

The push to fully integrate email into all channels and all aspects of a business shows no signs of slowing down. That should propel the parent companies of ESPs to make more acquisitions in the years ahead—as well as propel more tech giants to acquire ESPs—as everyone tries to become a one-stop shop for their customers.

2. GDPR

Becoming compliant with [General Data Protection Regulation \(GDPR\)](#) is no small feat for an ESP. Some ESPs that primarily do business in the US have decided not to become compliant, sacrificing some international business in the process.

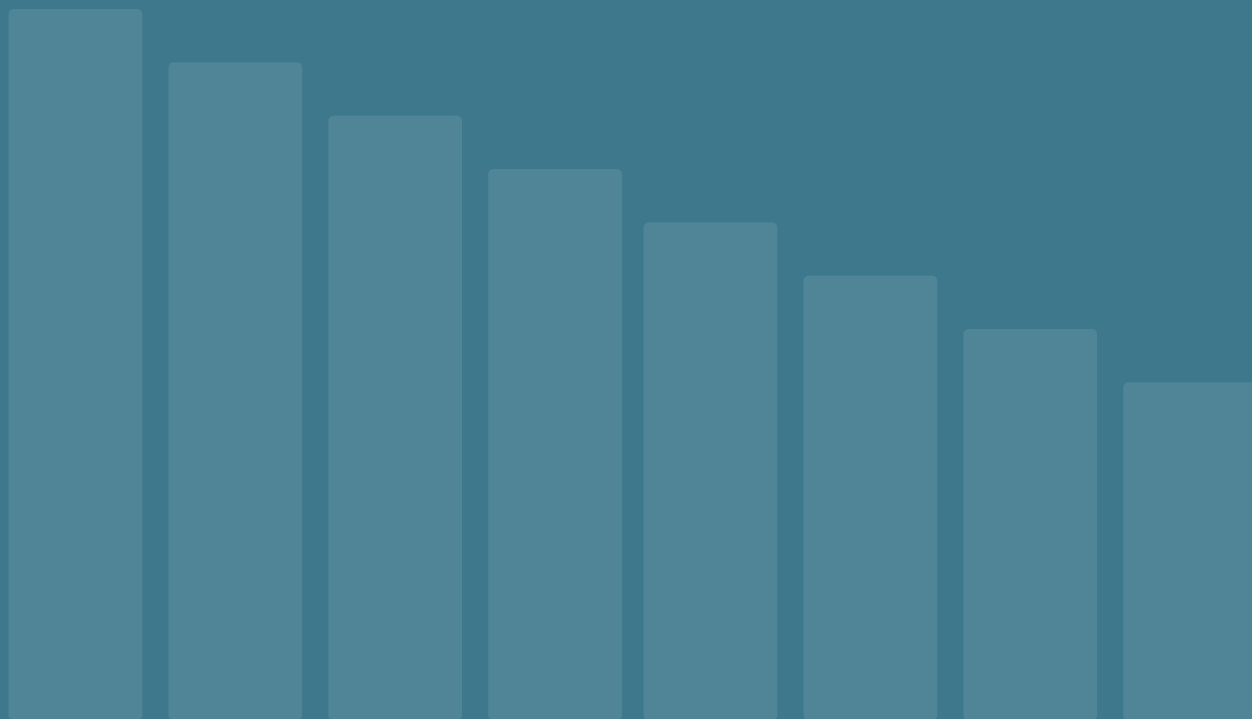
3. AMP for Email

[Google's announcement](#) that it would support AMP for Email in Gmail was exciting news. However, [marketers can't take advantage of AMP for Email](#) unless their ESP adds support for the new MIME type that Gmail requires. That's not a given.

In 2015, when Apple introduced the Apple Watch, they provided support for a new email MIME type, [watch-html](#), that allowed senders to craft a message that was tailored to the small screens of the browserless devices. But almost no ESPs added support for the new MIME type to their platforms, so adoption is effectively zero.

AMP for Email may be a very different story. That's because the Apple Watch remains a relatively small platform, with only [18 million units sold in 2017](#), and a very limited one until it supports the ability for consumers to convert by clicking through to a website. In contrast, 26% of emails were opened in Gmail in 2017, according to [Litmus' Email Client Market Share data](#). And for some B2C marketers, a much higher portion of their subscribers are on Gmail. That should spur some brands to seek out this functionality from their ESP, not all of which will offer it.

All of those issues should keep the industry competitive and dynamic well into the future. Now, let's look at the current competitive state of the ESP industry.



The Top ESPs

Brands continue to have hundreds of email service providers from which to choose. That diversity exists in large part because most ESPs specialize in some way, whether it's serving companies...

- In a certain geography
- Of a certain size
- In a certain industry
- Looking for certain functionality or characteristics

This long-tail diversity means that the top 10 ESPs can vary depending on those factors—sometimes dramatically. It also means there are lots of choices outside of the top 10, including up-and-comers, innovators, bargains, and even some vendors you may not consider to be ESPs because of the evolving definition of an email service provider. Cross-compare these top 10 lists to close in on the ESPs that are the most popular among brands that are similar to yours.

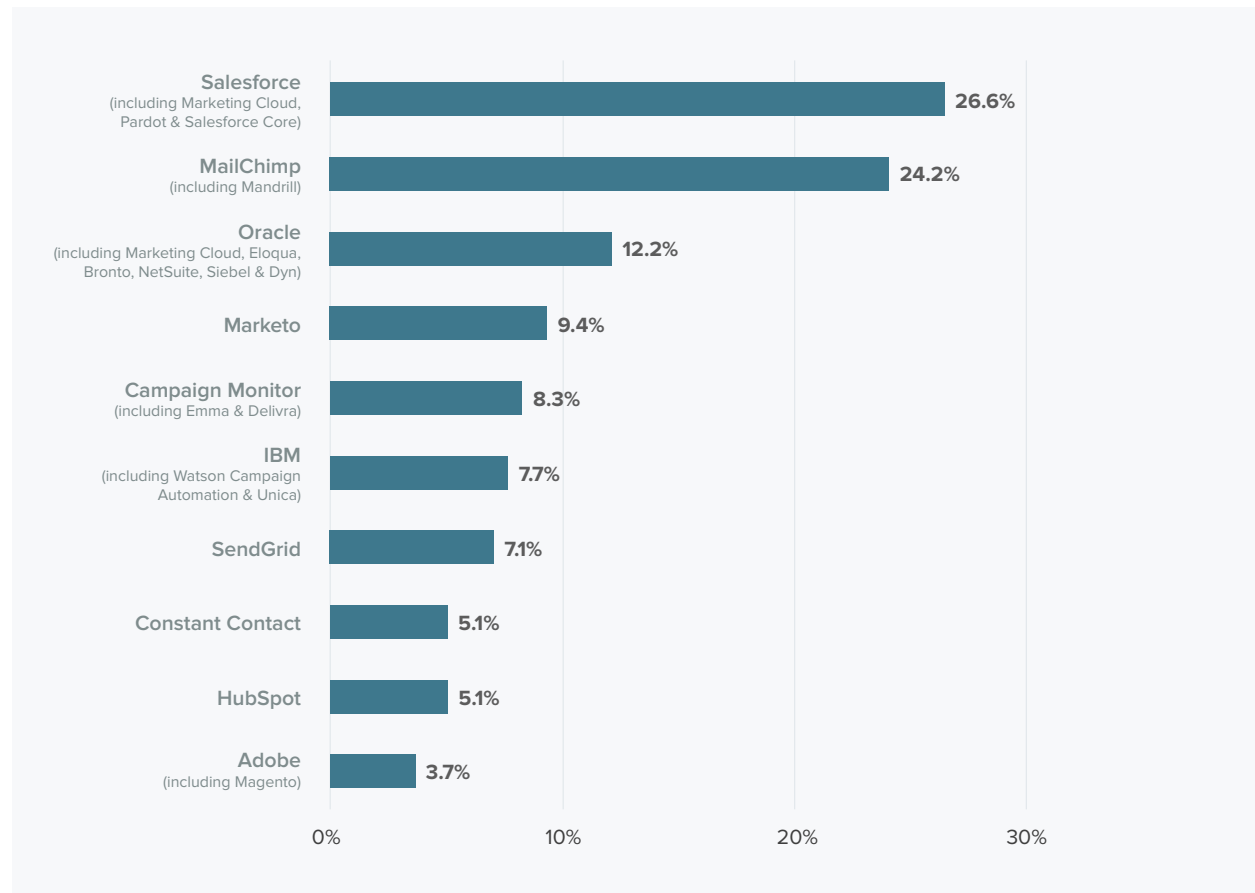
Finally, keep in mind that this report is not meant to be a substitute for a thorough ESP search or request for proposal (RFP) process. These listings are based on user market share, not user value market share. That means that the comparative market shares listed do not necessarily reflect the comparative size of these ESPs as companies. Additionally, these listings do not consider past changes in market share, the strength of future offerings, your unique business and team requirements, or a myriad other factors that may be critical to comparing or selecting an ESP. For those reasons and others, these listings should not be considered as an endorsement or recommendation of one ESP over another.

Litmus works alongside any email service provider and is proudly ESP-agnostic.

Top ESPs Overall

Which email service provider(s) does your company currently use to send its marketing emails?

1,699 respondents



Litmus Works Where You Do

Maximize your marketing technology investment, simplify your workflow, and reduce errors with Litmus ESP Syncing and the Litmus Extension. ESP Syncing lets you sync your code from Litmus Builder to your ESP with the one-time click of a button, while Extension lets you preview and test emails directly on your desktop or within your ESP.

[Learn more about ESP Syncing and Extension →](#)

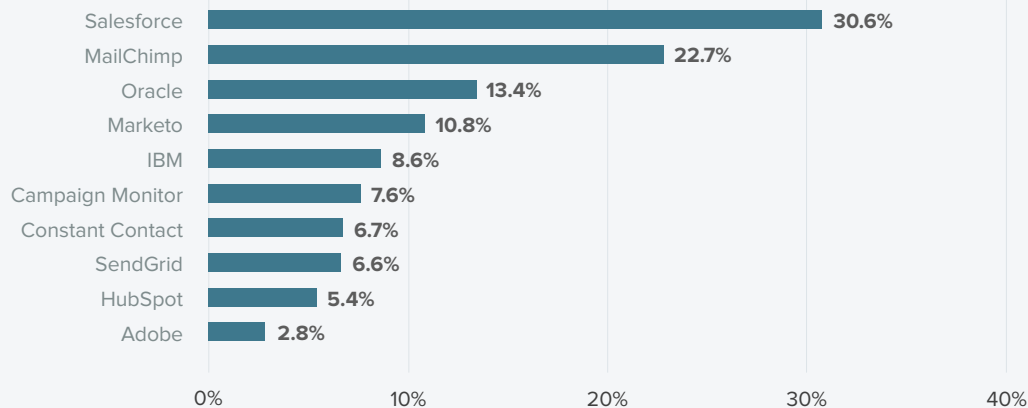


Top ESPs in US & Canada

Percentage of brands in the United States and Canada using each email service provider.

1,230 respondents

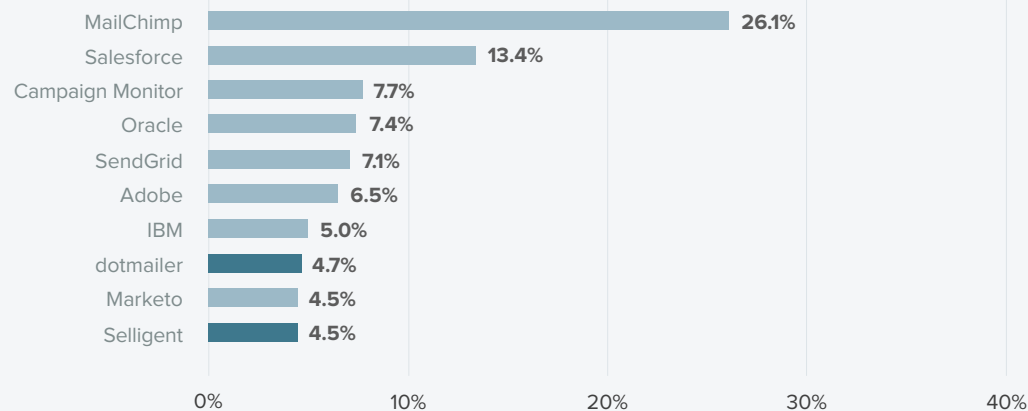
With 63% of the 2018 State of Email Survey respondents being from the US, it's no surprise that the top 10 in the US and Canada differs relatively little from the overall top 10 list.



Top ESPs in Europe & the UK

Percentage of brands in Europe and the United Kingdom using each email service provider. ESPs that have considerably more market share in this sector are highlighted.

337 respondents



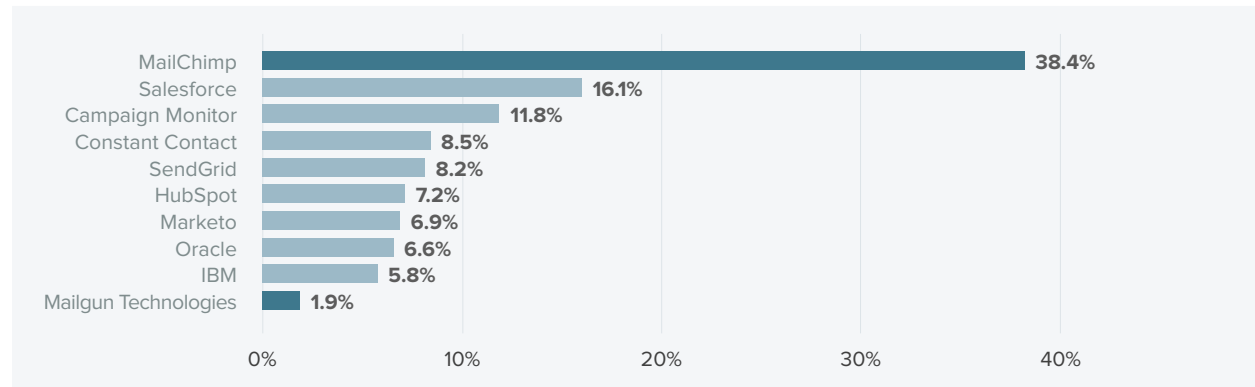
ACTION ITEM

- ☒ Read [A Snapshot of an Email Professional](#) to better understand the demographics of our survey respondents and to see how you compare to other email marketers.

Top ESPs Among Small Businesses

Percentage of brands with fewer than 100 employees using each email service provider.
ESP that has considerably more market share in this sector is highlighted.

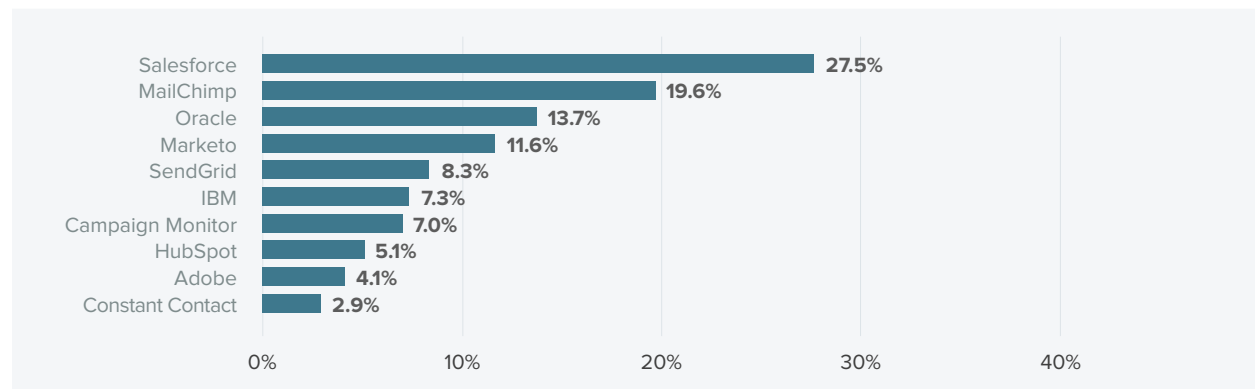
635 respondents



Top ESPs Among Mid-sized Businesses

Percentage of brands with 100-1,999 employees using each email service provider.

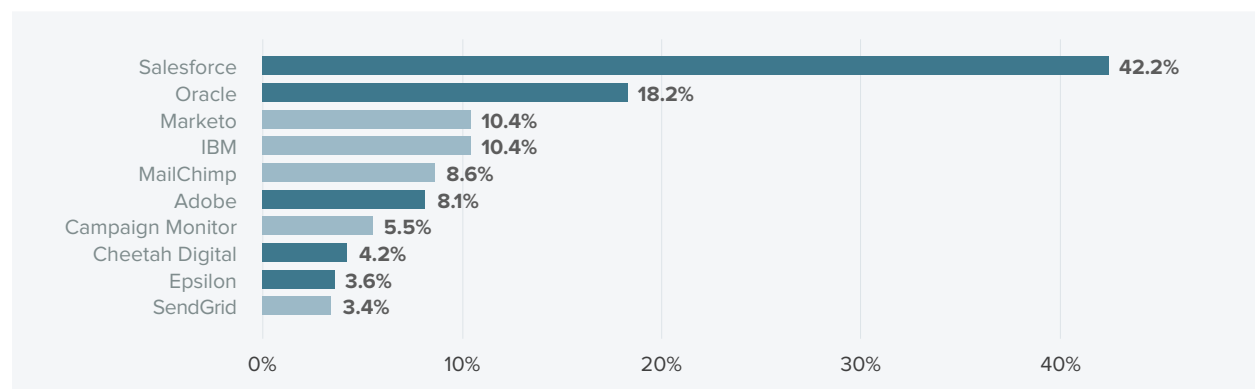
629 respondents



Top ESPs Among Enterprises

Percentage of brands with 2,000 or more employees using each email service provider.
ESP that has considerably more market share in this sector is highlighted.

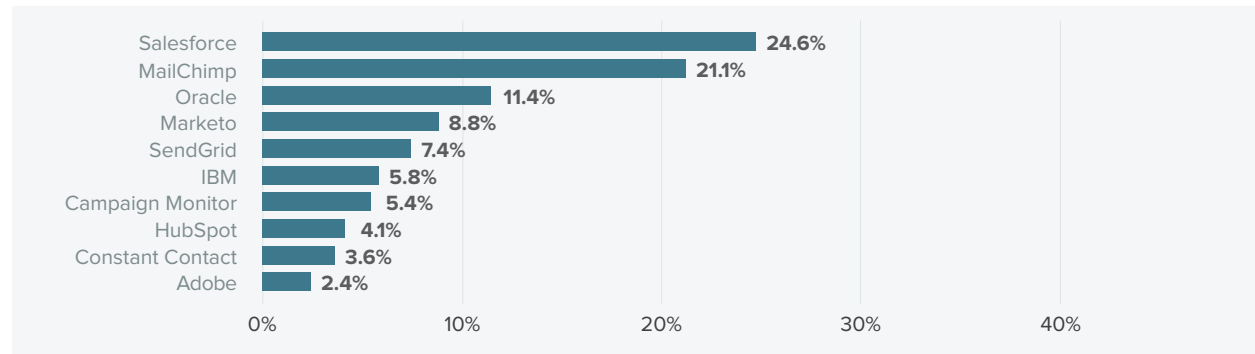
384 respondents



Top ESPs Among Centralized Organizations

Percentage of brands with centralized organizational structures using each email service provider.

913 respondents

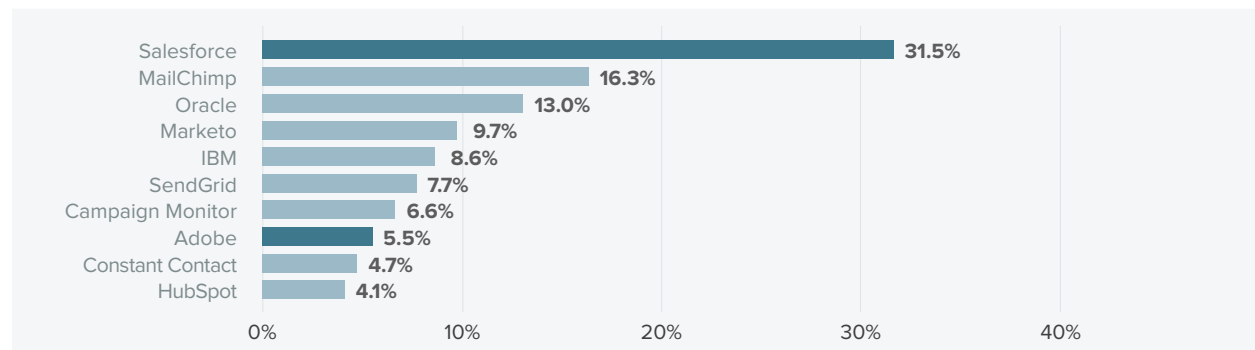


Since 69% of our survey respondents work at centralized organizations, this top 10 list varies only a little from the overall list of top ESPs.

Top ESPs Among Decentralized Organizations

Percentage of brands with decentralized organizational structures using each email service provider. ESPs that have considerably more market share in this sector are highlighted.

362 respondents



Standardize Email Creation Across Your Organization

Maintaining consistency throughout a brand's email program is hard, especially if many different teams are involved in sending email. If your organization is decentralized, Litmus can help you standardize many parts of email creation, simplify training and upkeep, and ensure brand consistency across departments.

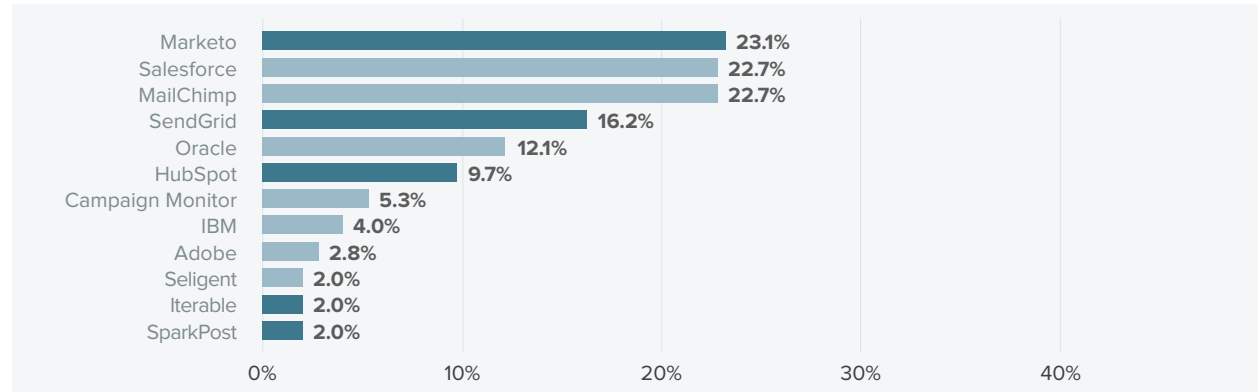
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Top ESPs Among Tech Companies

Percentage of brands in the software and technology industries using each email service provider. ESPs that have considerably more market share in this sector are highlighted.

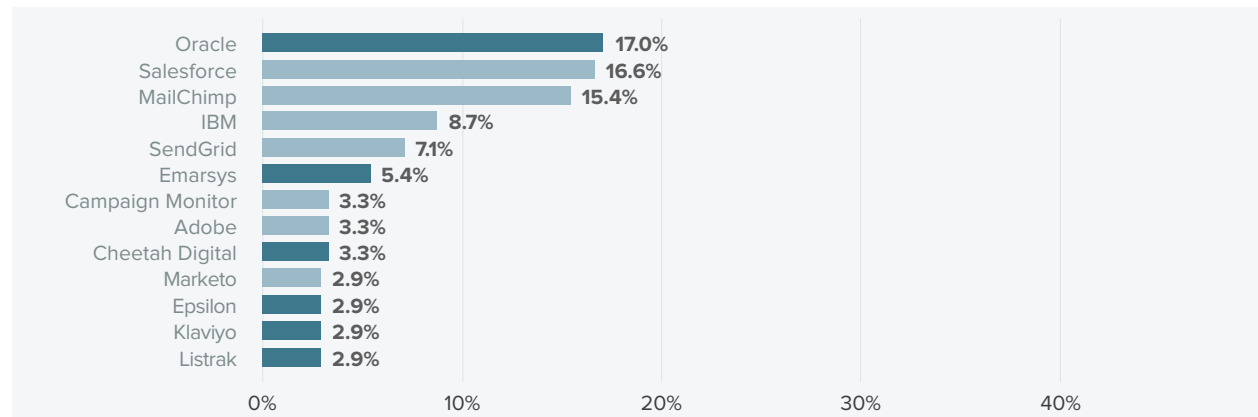
247 respondents



Top ESPs Among Retail Companies

Percentage of brands in the retail, ecommerce, and consumer goods and services industries using each email service provider. ESPs that have considerably more market share in this sector are highlighted.

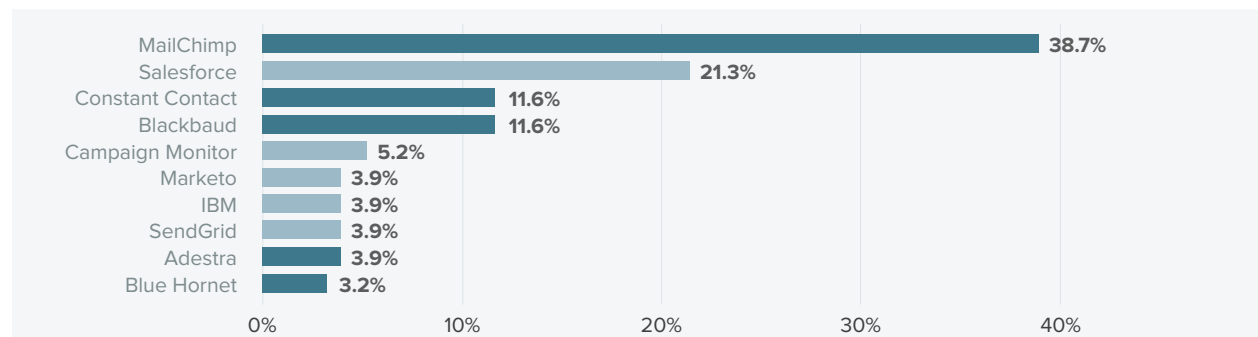
241 respondents



Top ESPs Among Nonprofits

Percentage of brands in the nonprofit industry using each email service provider. ESPs that have considerably more market share in this sector are highlighted.

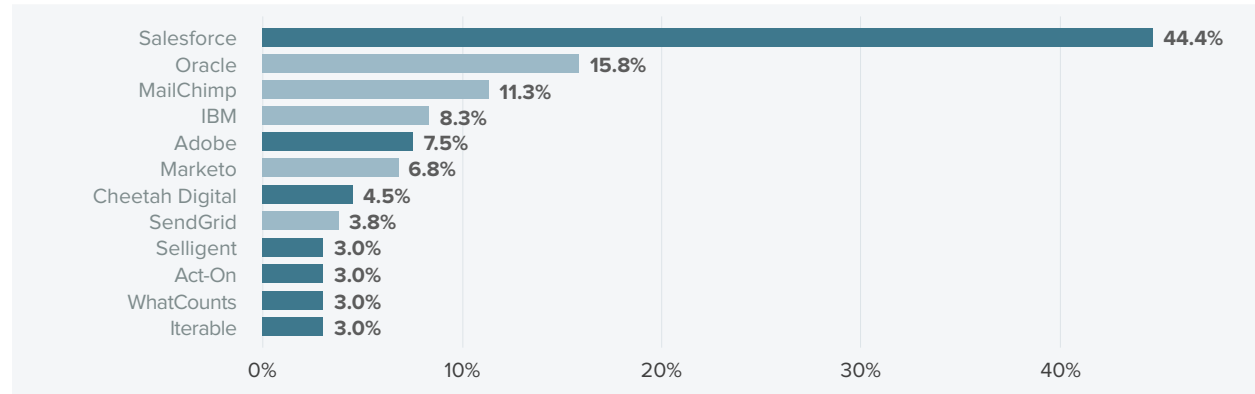
155 respondents



Top ESPs Among Financial Services Companies

Percentage of brands in the financial services and insurance industries using each email service provider. ESPs that have considerably more market share in this sector are highlighted.

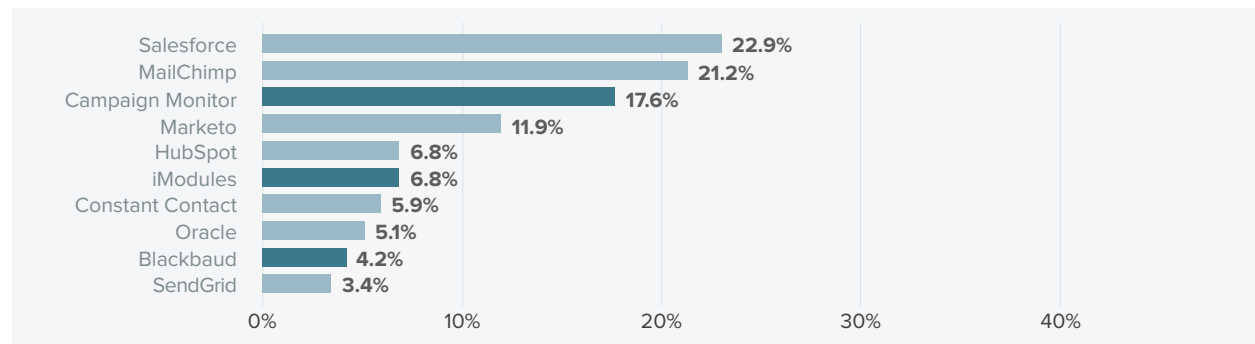
👤 133 respondents



Top ESPs Among Educational Companies

Percentage of brands in the education and training industries using each email service provider. ESPs that have considerably more market share in this sector are highlighted.

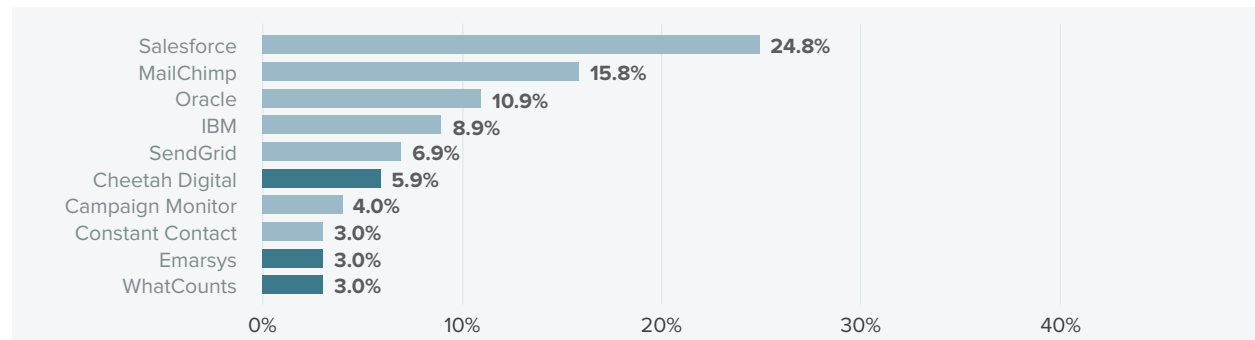
👤 118 respondents



Top ESPs Among Media & Entertainment Companies

Percentage of brands in the media, publishing, events, sports, & entertainment industries using each email service provider. ESPs that have considerably more market share in this sector are highlighted.

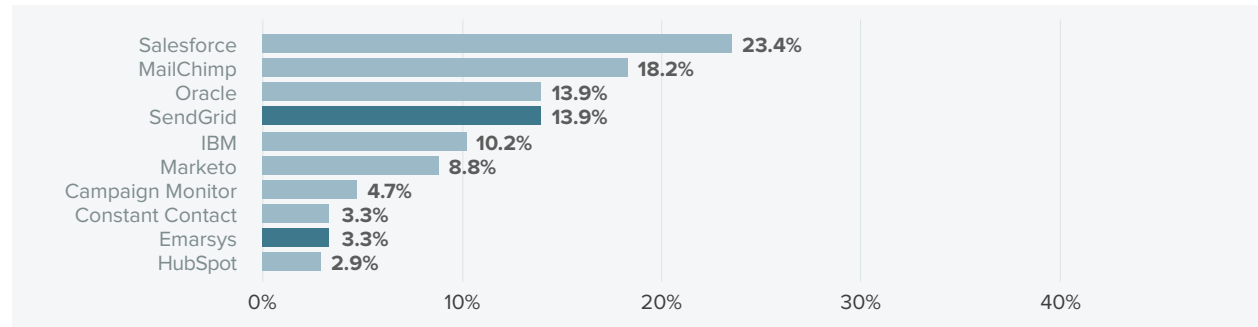
👤 101 respondents



Top ESPs Among Brands Making 25%+ of Email Revenue from Automation

Percentage of brands that generate at least a quarter of their email marketing revenue from automated emails using each email service provider. ESPs that have considerably more market share in this sector are highlighted.

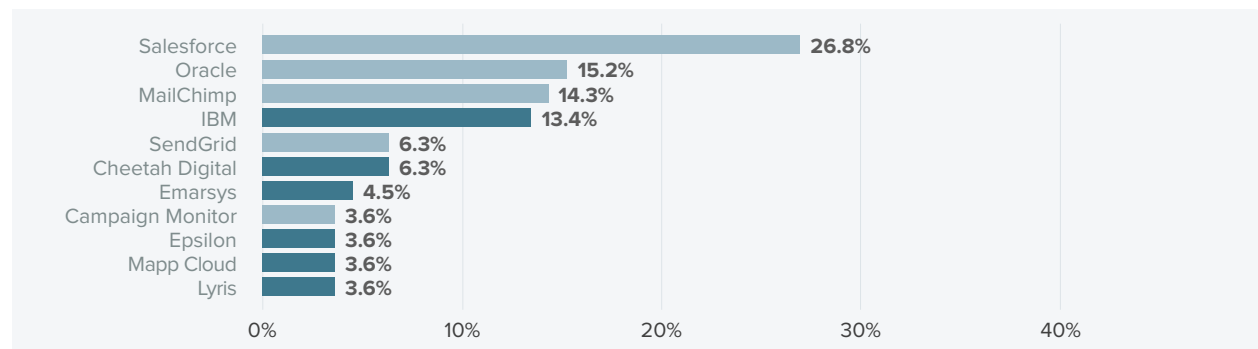
 274 respondents



Top ESPs Among High-Frequency Senders

Percentage of brands that send each of their subscribers at least 4 emails each week on average using each email service provider. ESPs that have considerably more market share in this sector are highlighted.

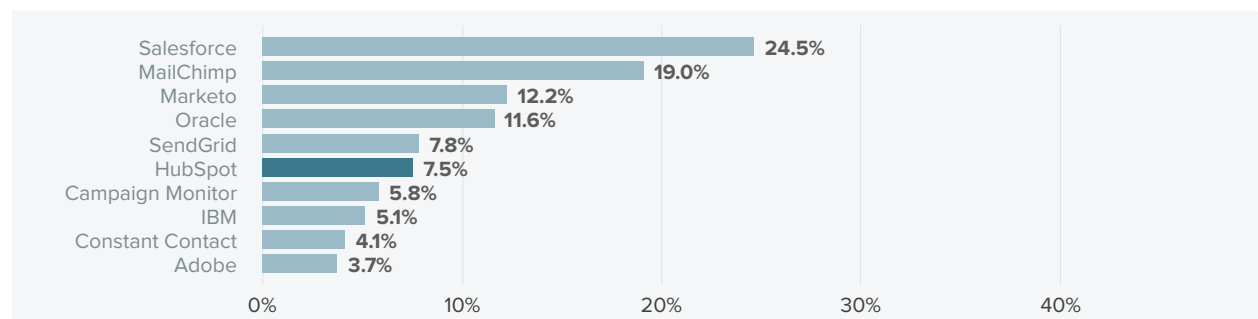
 112 respondents



Top ESPs Among Highly Integrated Email Programs

Percentage of brands that describe their email marketing programs as highly or very highly integrated into their other marketing channels using each email service provider. ESPs that have considerably more market share in this sector are highlighted.

 302 respondents





Limitations of ESPs

Of the eight potential **email marketing challenges for 2018** that we asked marketers about, the limitations of their email service provider ranked 3rd, with 14% saying it was the single biggest challenge they faced.

However, of the 11 potential **email marketing priorities for 2018** that we asked marketers about, changing their email service provider ranked 10th.

Does this mean that ESP limitations aren't really a challenge? No. It just means that marketers have no illusions about how difficult it is to change ESPs. It's a major undertaking in terms of time and cost, and involves considerable operational risks.

For instance, it takes time to migrate to a new ESP—time that could be spent on creating new automated email campaigns, optimizing existing campaigns, improving segmentation and targeting, doing more A/B testing, or other high-value activities. Training on a new ESP also takes time. **Changing ESPs can affect the rendering of your emails**, so you may need to update your templates. Plus, ESPs often calculate and report some email metrics differently, which can disrupt your analytics. It can also be expensive to change ESPs, especially if you need to hire an agency or contractor to help with the migration.

So it's a move that brands don't take lightly. Not only does an email marketer have to be very dissatisfied, but they have to convince their manager and company leadership that the change is worth the risk. Not many brands appear to be getting over that hurdle.

The Alternative to Switching ESPs

Just because you have limitations with your current ESP doesn't necessarily mean you need a new one. You may just need supplemental tools that improve your ESP's capabilities.

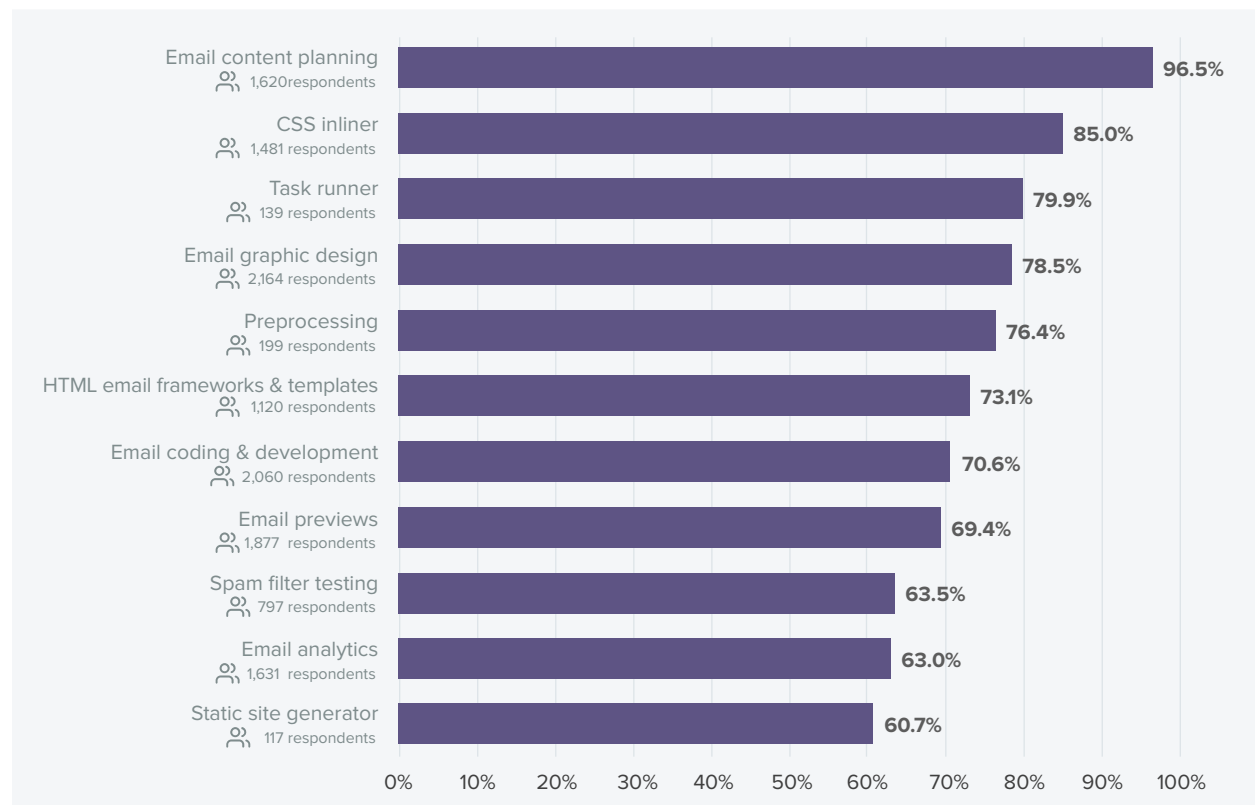
Expecting your ESP to provide all the functionality you need to plan, create, test, send, and analyze the performance of your emails is incredibly unrealistic. Very few senders expect this.

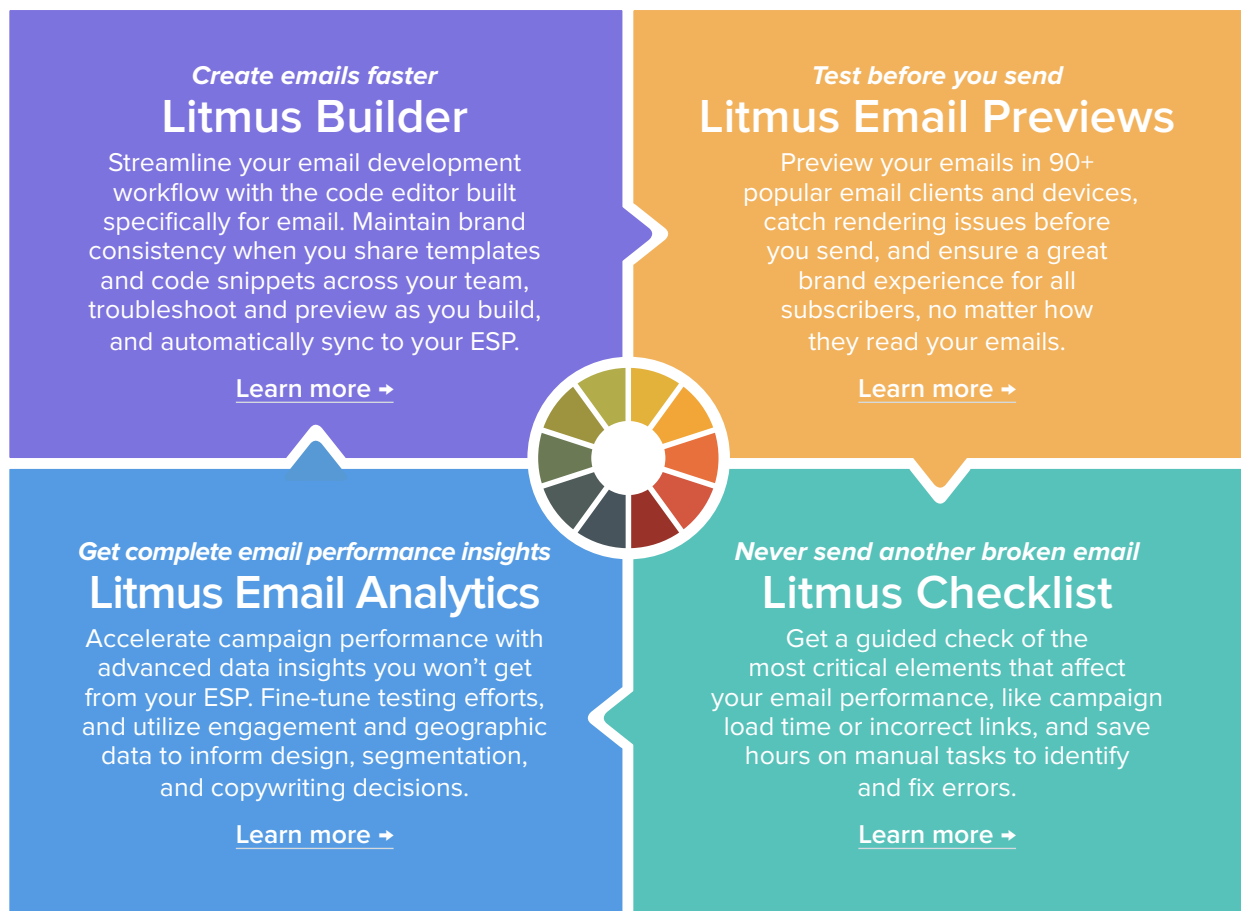


Simply put, the core functionality of ESPs is to send emails. With every function beyond that, brands have third-party options. And the majority of brands take advantage of supplemental software to improve their email creation process.

Few Brands Rely Solely on Native ESP Functionality

Percentage of brands using third-party software instead of the functionality native to their email service provider to perform the following tasks or functions, among those brands that do or use these.





Having a Well-Resourced Program

Resourcing levels correlate strongly with email program success, according to Litmus' research into [Email Marketing Staffing & Resourcing for Success](#). However, to a certain degree, the ESP a brand uses doesn't appear to have much of an effect on resourcing satisfaction. For example, well-resourced and less well-resourced programs use the top 10 ESPs at the same overall rate.

Instead, it's these add-on and supplemental tools that really make the difference in program resourcing. For example, well-resourced email programs are more than twice as likely as less well-resourced programs to use a [preprocessor](#) (19% vs. 9%), [postprocessing](#) (13% vs. 5%), and use an [extensive pre-send QA checklist](#) (36% vs. 16%), whether it's a manual list or an automated one like [Litmus Checklist](#).

Many other tools offer smaller, but still significant benefits. For example, well-resourced email programs are 30% more likely than less well-resourced programs to use third-party analytics to supplement the dashboards they get from their ESP (78% vs. 60%). They are also 23% less likely to use their ESP's code editor (27% vs. 35%), and 19% less likely to use their ESP's spam filter testing (33% vs. 41%).

That's not to say that your choice of ESP is unimportant, because it's a critical decision. However, our findings make it clear ESPs simply don't provide all of the functionality a brand needs. Your ESP is not your email process. Brands need to layer other email marketing tools on that foundation before it's truly strong enough to support a successful email marketing program.



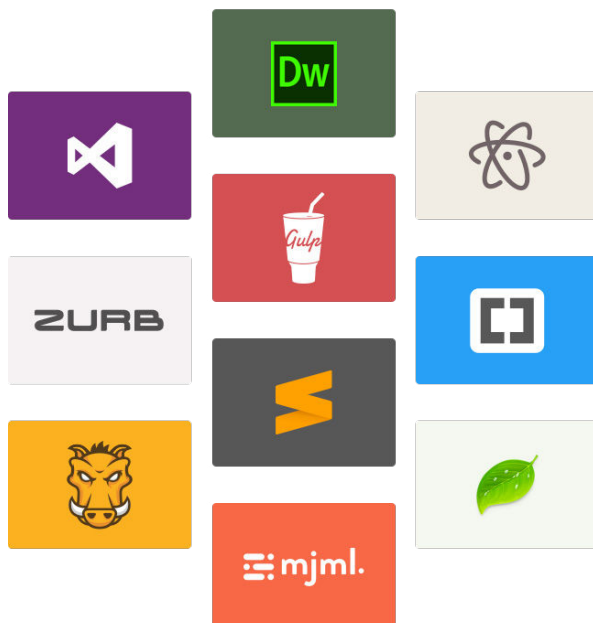
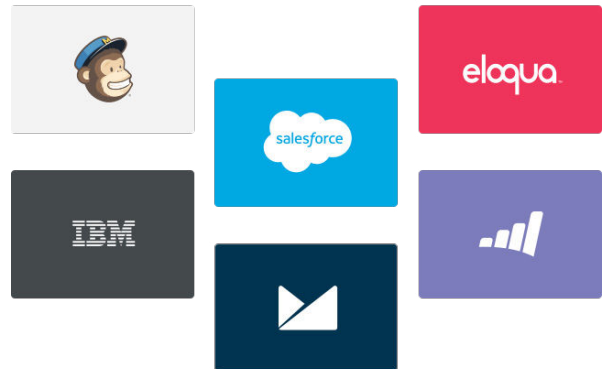
Litmus Works Where You Do

Litmus integrates with the email marketing platforms your team uses every day. Maximize your marketing technology investment, simplify processes, and reduce errors with ESP Syncing and the Litmus Extension.

ESP Syncing

Increase efficiencies and reduce email production times. Seamlessly transfer your code from Litmus Builder to your email service providers (ESPs) with a single click. Then automatically sync code changes between Builder and your ESP.

Avoid opportunity loss due to unnecessary mistakes and broken emails. Eliminate manual copy-and-paste errors that impact email performance and ensure every email conveys the best possible brand experience.



Litmus Extension

Streamline workflows and increase productivity with Litmus wherever you build. Eliminate the need to switch between tools by bringing Litmus right alongside your code editor or into your ESP. Increase efficiency and enable your team to preview, test, and troubleshoot emails right where they build.

Improve email output, while ensuring high levels of quality. Catch mistakes and avoid costly manual copy-and-paste errors by running Litmus Checklist within your ESP, and make your quality assurance process easy, fast, and consistent.

[Learn more →](#)



About Litmus

Litmus helps more than 250,000 marketers make email better. They use the Litmus Email Creative Platform alongside their existing email service provider to ensure a consistently great brand experience for every subscriber, work more efficiently, accelerate campaign performance, reduce errors, and stay out of the spam folder. For more information about Litmus and the latest email news and trends, visit www.litmus.com.



About the Author

Chad White is the Research Director at Litmus and the author of *Email Marketing Rules* and thousands of posts and articles about email marketing. A former journalist at Condé Nast and Dow Jones & Co., he has spent more than a decade researching email trends and best practices at the Direct Marketing Association, Responsys, ExactTarget, Salesforce.com, and in his current role. Chad is the Email Experience Council's 2018 Email Marketer Thought Leader of the Year.



About the Designer

Andrea Smith is a freelance designer and artist in Bluffton, SC with a passion for good software, travel, and rescue pups. With over thirteen years of professional design and digital marketing experience, Andrea is an award-winning creative professional, recognized for strengths in strategic thinking, tactical planning, and design thought leadership.