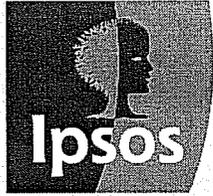


Consumer Perceptions of Email, Junk Mail, and Spam

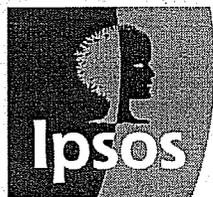
Prepared for ESPC
Prepared by Annie Pettit
December 2006



Sample

Target Group:

- i-Say Online Survey Panel
 - Random sample of US panelists who reflect the US internet population and whose email domain is one of the following:
 - AOL, MSN/Hotmail, Yahoo!, Lycos, Excite, Gmail, Netscape, CS
- Mailed surveys
 - N=7,600
- Completed surveys
 - n=2,252
- Usability Rate
 - 29.6%

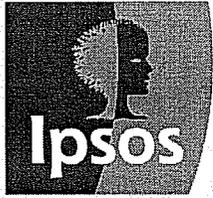


Participants

- The returning sample was reflective of the US Internet population and consisted of these demographics:

Demographic	Sample %
Age	
18 to 24	4%
25 to 34	16%
35 to 44	22%
45 to 54	28%
55 to 64	18%
65+	11%
Gender	
Male	48%
Female	52%
Household Size	
1	13%
2	36%
3 or 4	39%
5 or more	12%

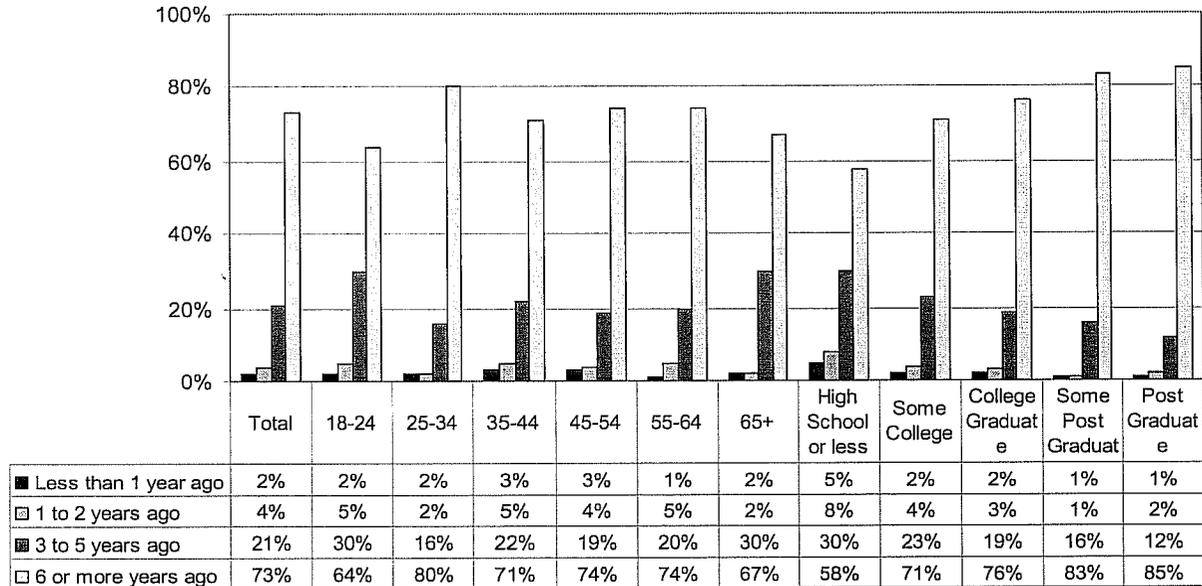
Demographic	Sample %
Education	
Up to highschool	19%
Some college	22%
College +	59%
Income	
Up to \$24,999	17%
\$25,000 to \$49,999	27%
\$50,000 to \$74,999	20%
\$75,000 +	37%
Market Size	
Non MSA (Rural)	18%
50,000-24, 999	8%
250,000-499,999	10%
500,000-999,999	11%
1 to 2.49 million	25%
2.5 million+	28%

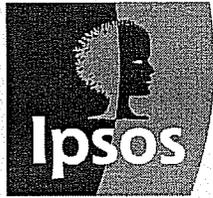


Introduction to Email

- About 73% of panelists have 6 or more years of experience with email.
- Age and education again show the strongest relationship with higher educated panelists using email for the longest time while the youngest and oldest panelists have been using email for the shortest time.
- Q1_2. Approximately when did you start to use Email?

Q1 Email Introduction by Age and Education

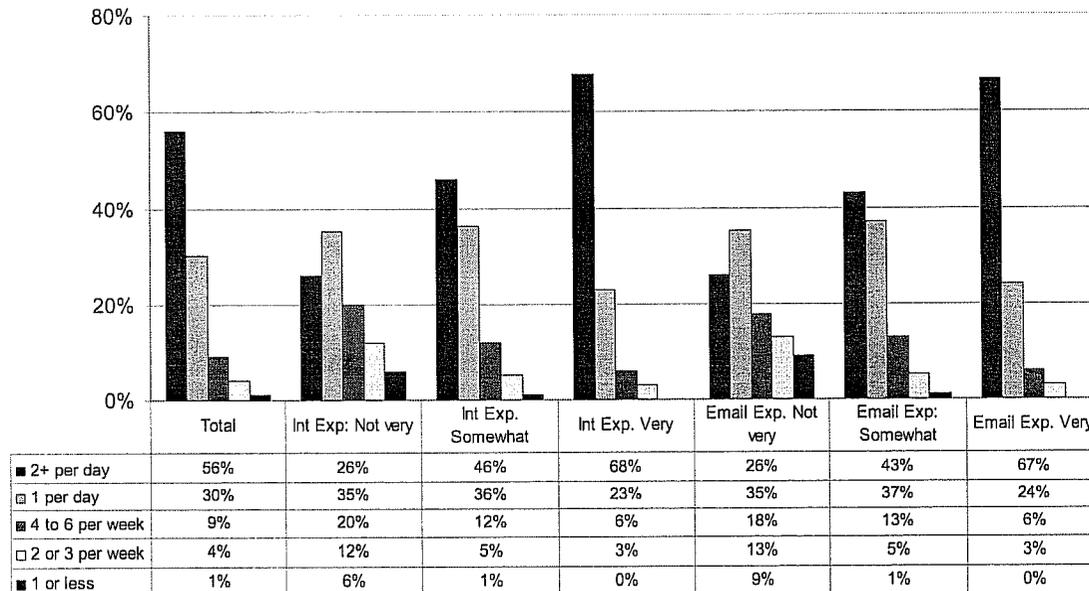


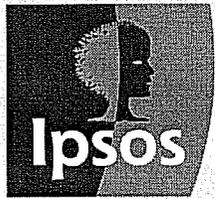


Frequency of Checking of Email

- On average, panelists check their email 1 or more times per day.
- Panelists who check their email frequently include experienced internet users, and experienced email users.
- Q6. On average, how often do you check your personal emails?

Q6 Email Checking Frequency by Demographics

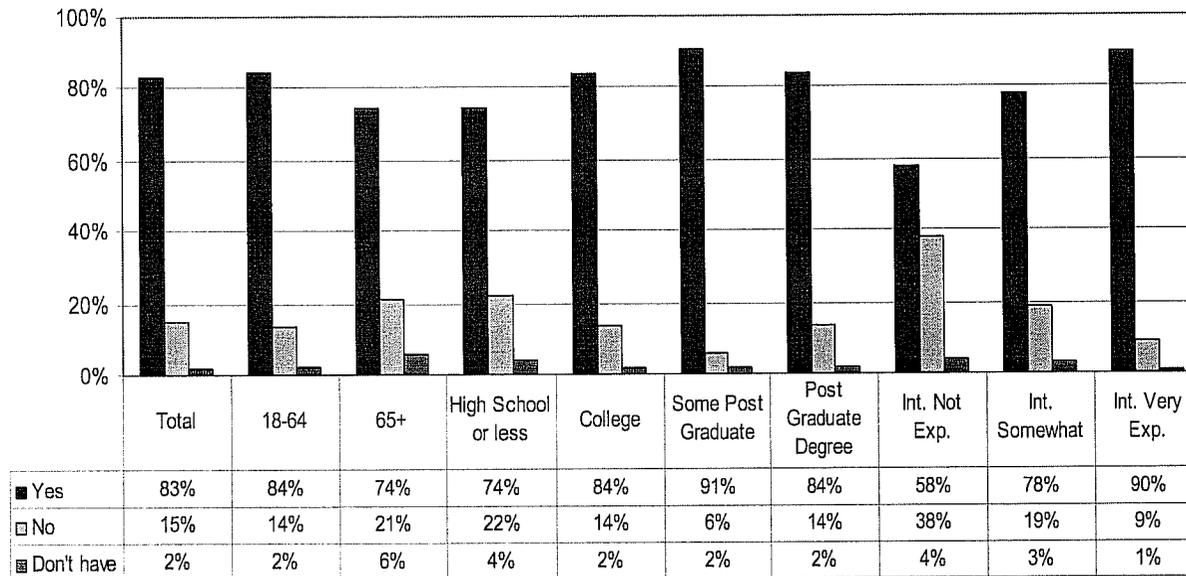


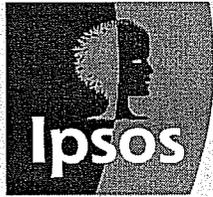


Ever Used "Report Spam" Buttons?

- On average, about 83% of panelists indicate that they have used a "Report Spam" button.
- Younger, more educated, and more experienced panelists have higher rates of using such buttons.
- Q9. Some email programs have a 'Report spam' or a 'Junk' button that you can use. Have you ever used these buttons in your email program?

Q9 Ever Used "Report Spam"?

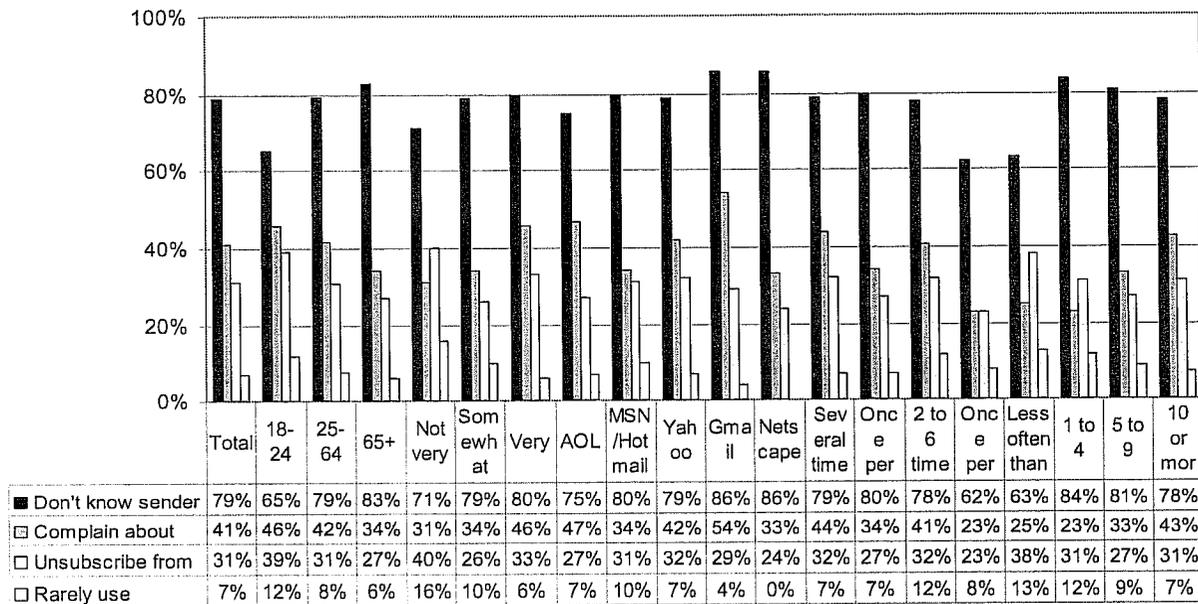


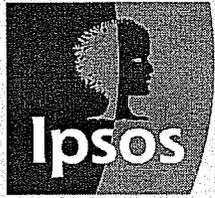


When “Report Spam” Button is Used

- About 80% of people indicate that they would use the spam button when they don’t know who the sender is. Panelists would use the spam button to complain about emails or to unsubscribe about 40% and 30% respectively.
- Q16. When would you use the 'Spam' or 'Junk' button?

Q16 When Would You Use Spam Button

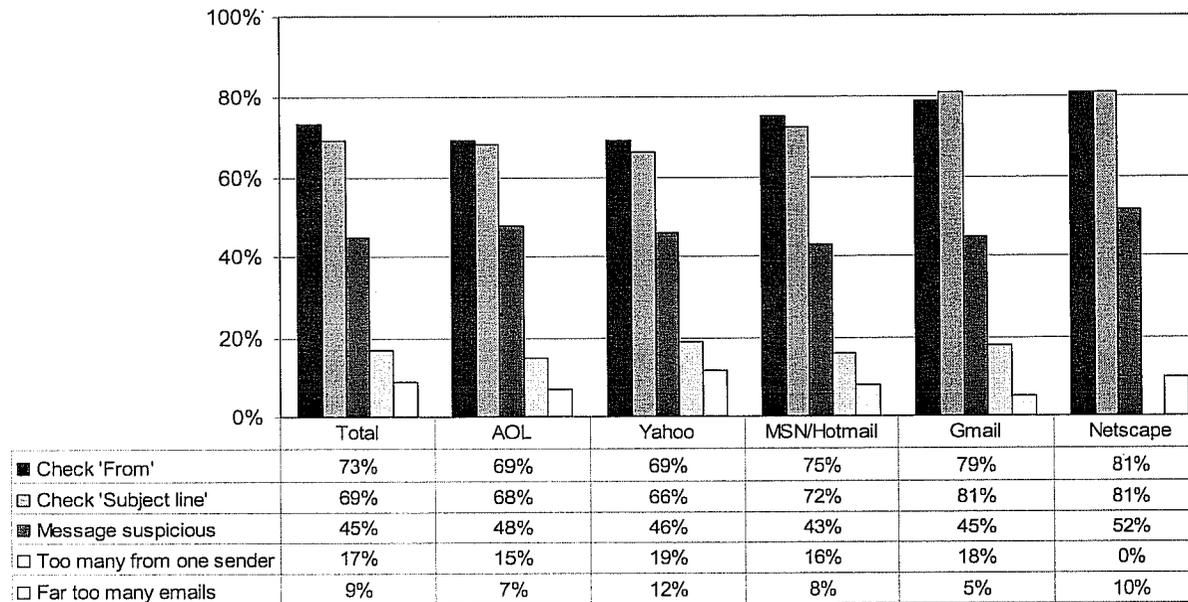


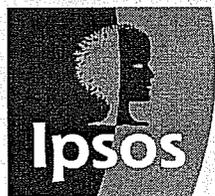


Decisions about "Report Spam" Button

- Netscape and Gmail users are more likely to check "From" addresses and subject lines to make decisions about spam.
- They are less likely to be concerned about the quantity of emails.
- Q12. How do you decide if you're going to click on the 'Spam' or 'Junk' button for an email?

Q12 Decisions about Spam Buttons

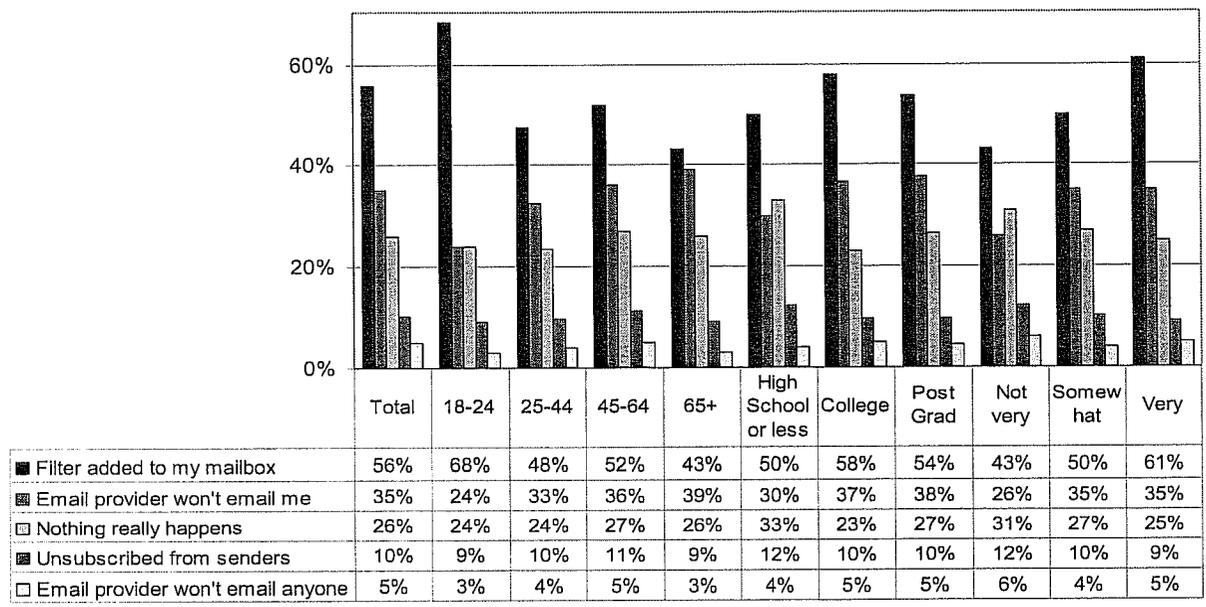


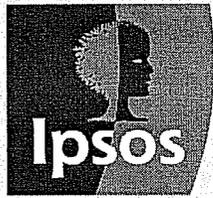


Result of Using "Report Spam" Button

- More than half of people believe that using spam button will create a filter in their mailbox. Many other people believe the email provider won't email them anymore, or that nothing will actually happen.
- Those with lower education or little experience are more likely to believe nothing will happen.
- Q17. Based on what you currently know, what do you think happens when you click on the 'Spam' or 'Junk' buttons?

Q17 What Happens With Spam Button

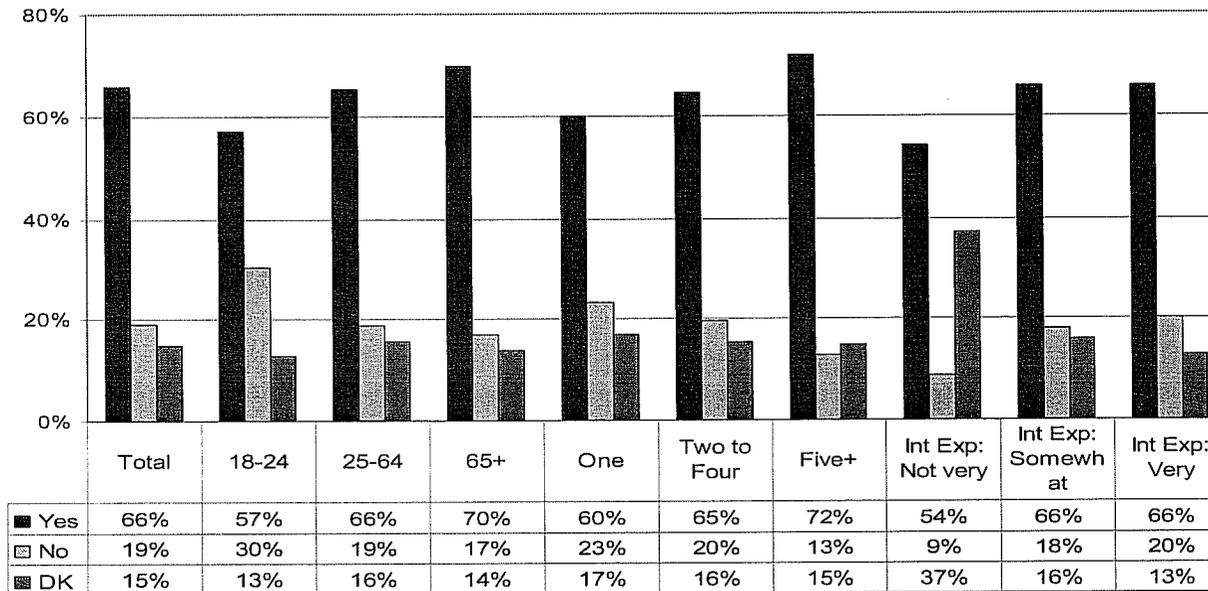


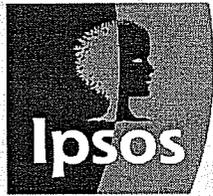


Giving Reasons for “Report Spam” Button Use

- On average, people are willing to provide a reason for clicking on a spam button. In particular, panelists who are older or from larger households are more likely to do so.
- Q18. When you click on the 'Spam' or 'Junk' button, would you be willing to also click on another box to provide a reason for identifying it as spam?

Q18 Would You Give a Reason for Spam Click

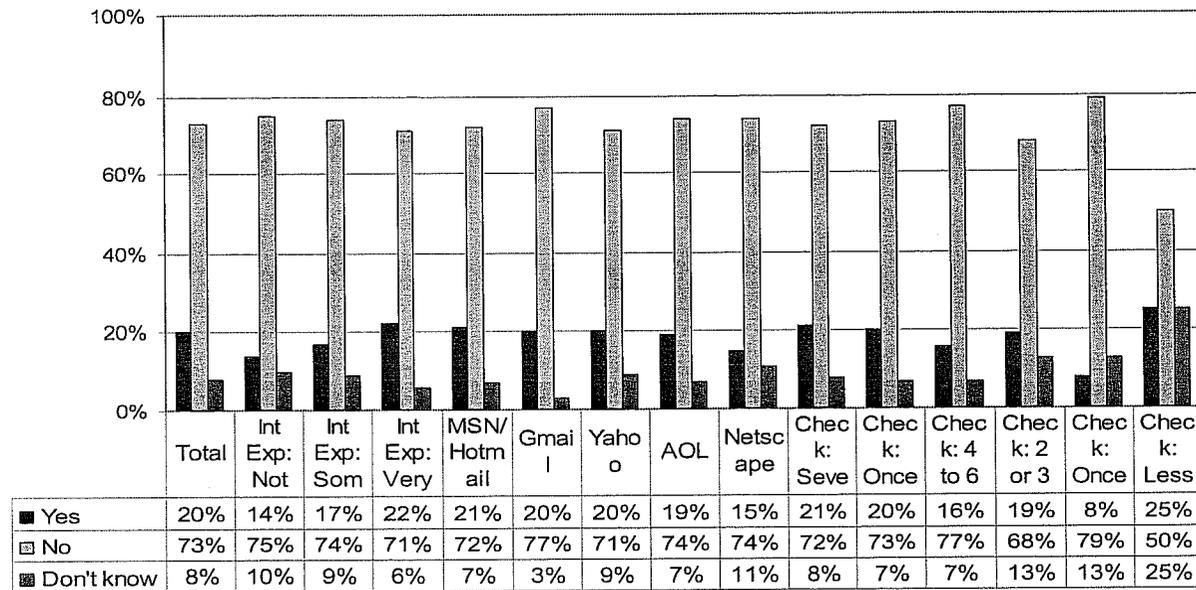


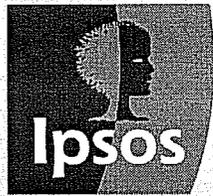


Using "Report Spam" Buttons to Unsubscribe - 2

- About 20% of panelists admit to having used a spam button as a quick way to unsubscribe. Experienced internet users and infrequent email checkers are more likely to do so, whereas inexperienced users and weekly checkers are far less likely to do so.
- Q22. Have you ever used the 'Spam' or 'Junk' button as a quick way to unsubscribe?

Q22 Use Spam Button to Unsubscribe

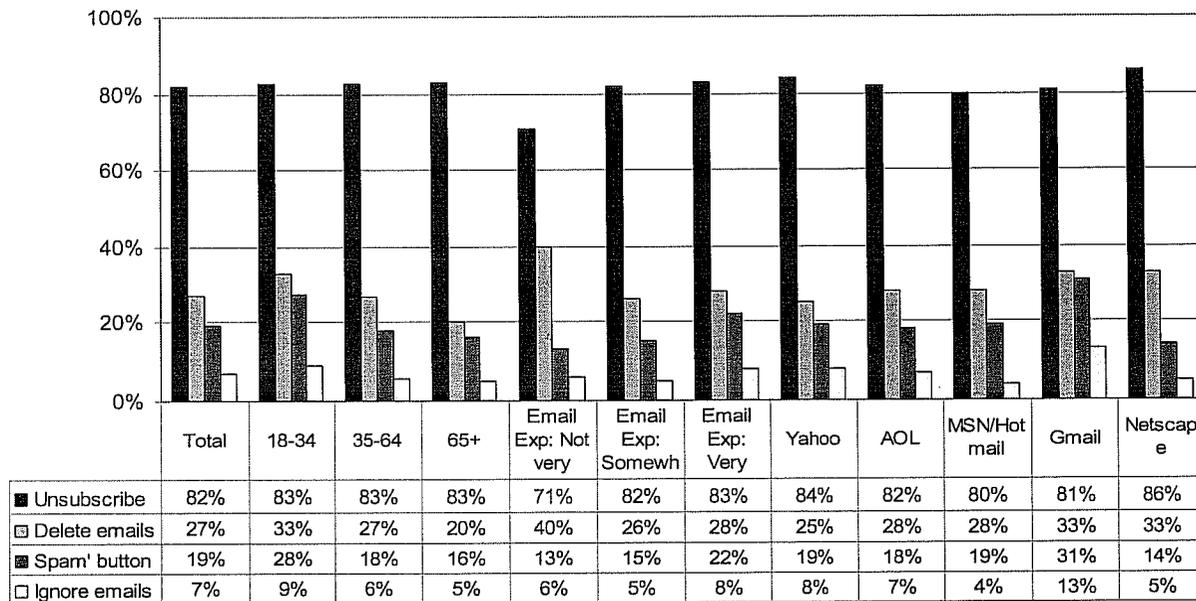


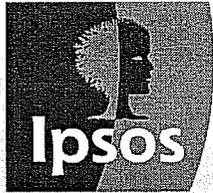


Handling Unsubscribes

- While more than 80% of people, do in fact, use the unsubscribe features provided in emails, inexperienced email users are less likely to do so, while Netscape users are more likely to do so.
- On the other hand, younger, inexperienced, and Gmail/Netscape users are more likely to just delete the email or click on the spam button
- Q14. In the past, you may have requested to receive emails from a company and then decided you no longer wanted to receive those emails. How do you deal with these emails?

Q14 Emails You No Longer Wish To Receive

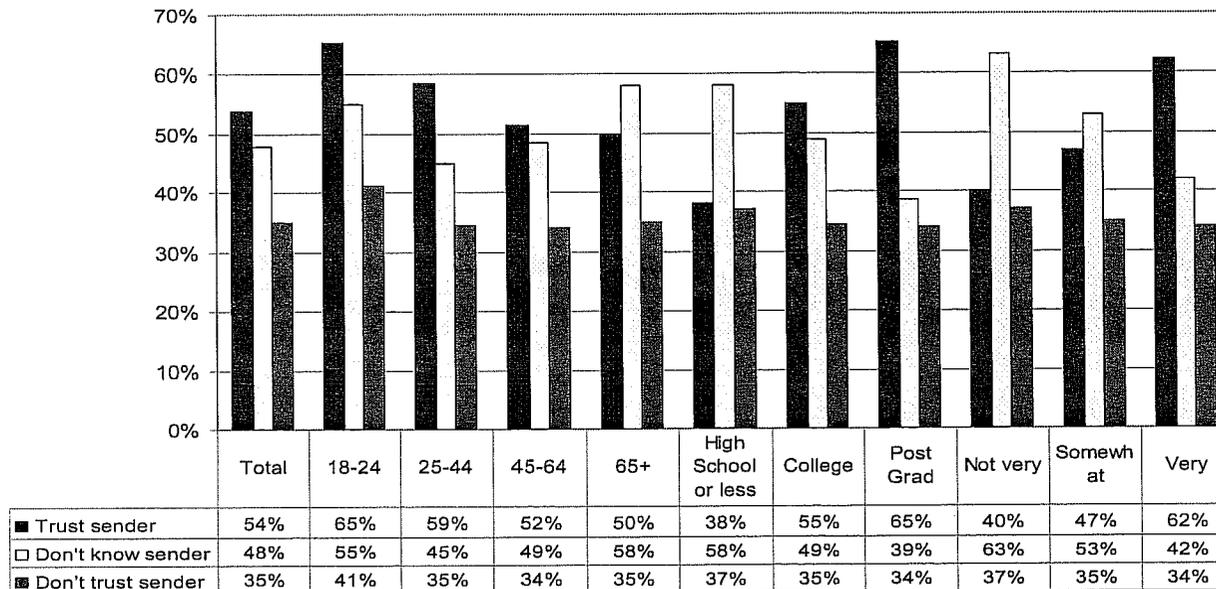


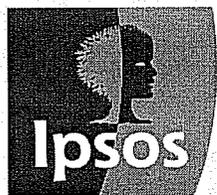


Use of Unsubscribe Links

- Though trust is significantly most important, on average, panelists are also likely to use unsubscribe links regardless of whether or not they trust the sender.
 - Younger panelists are generally more trusting of unsubscribe links.
 - Panelists with more education or more internet experience are more likely to use unsubscribe links only if they trust the sender.
- Q20. When would you use the unsubscribe link provided within an email?

Q20 When Use Unsubscribe Link

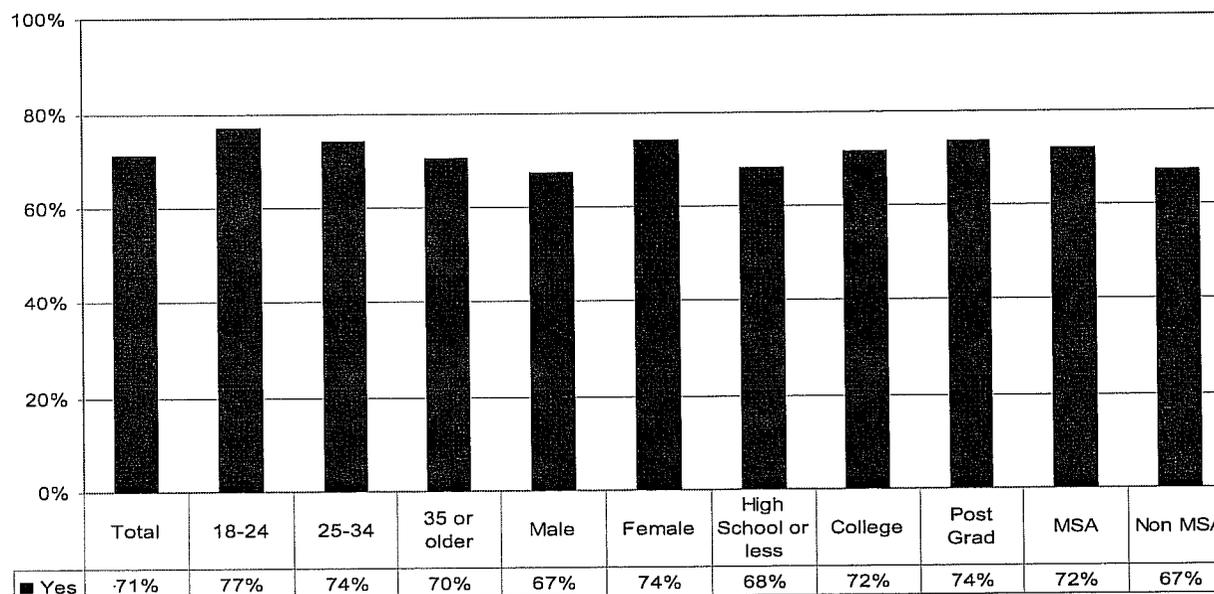


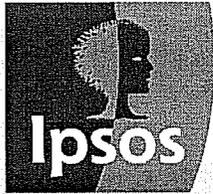


Confidence in Unsubscribing

- On average, about 71% of panelists believe that unsubscribe links work. There is little variation among these different groups with women and those from rural areas being slightly more trusting.
- Q21a. Do you believe unsubscribing from a message you've requested will work?

Q21 Will Unsubscribe Work

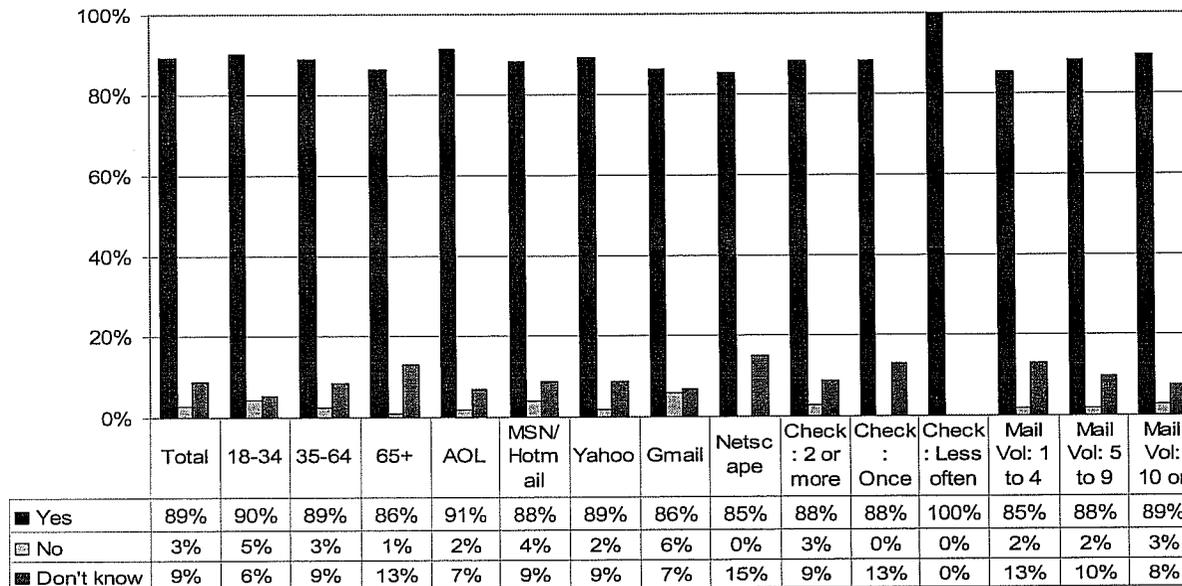


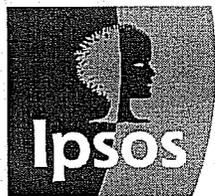


Use of Email Unsubscribe Button

- Nearly 90% of panelists indicate they would use an unsubscribe button in their email program, with infrequent checkers more likely to do so and older users, Netscape users, and low volume email receivers less likely to do so.
- Q23. If an 'Unsubscribe' button was added to your email program, would you use the 'Unsubscribe' button where appropriate?

Q23 Use Unsubscribe Button in Email Program

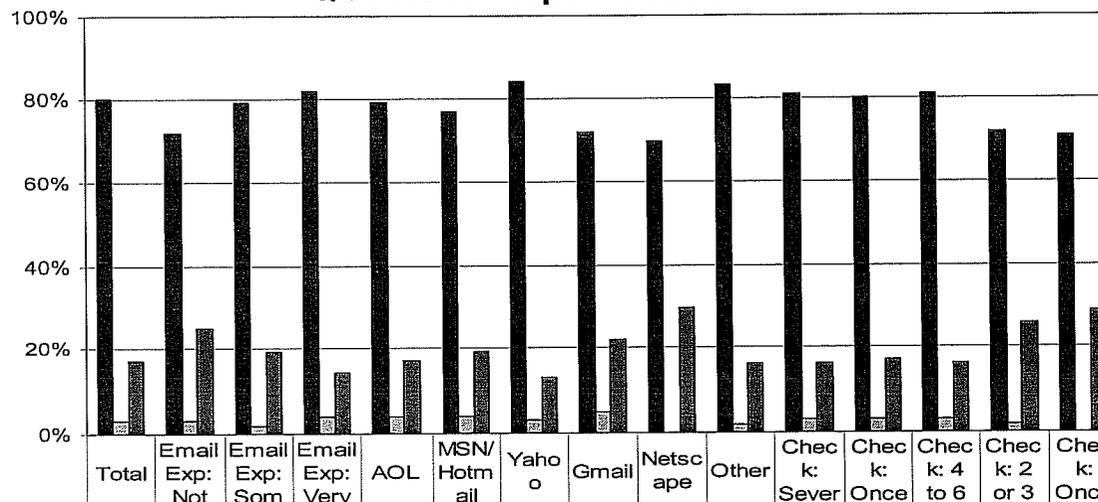


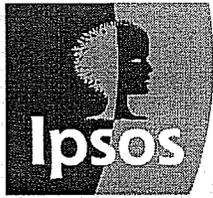


“Report Fraud” Button

- About 80% of panelists believe there should be a “Report Fraud” button with Yahoo! users more likely to agree and Gmail/Netscape users less likely to agree.
- Q24. Should there also be a 'Report Fraud' button to distinguish criminal messages from other spam/junk emails?

Q24 Need Report Fraud Button

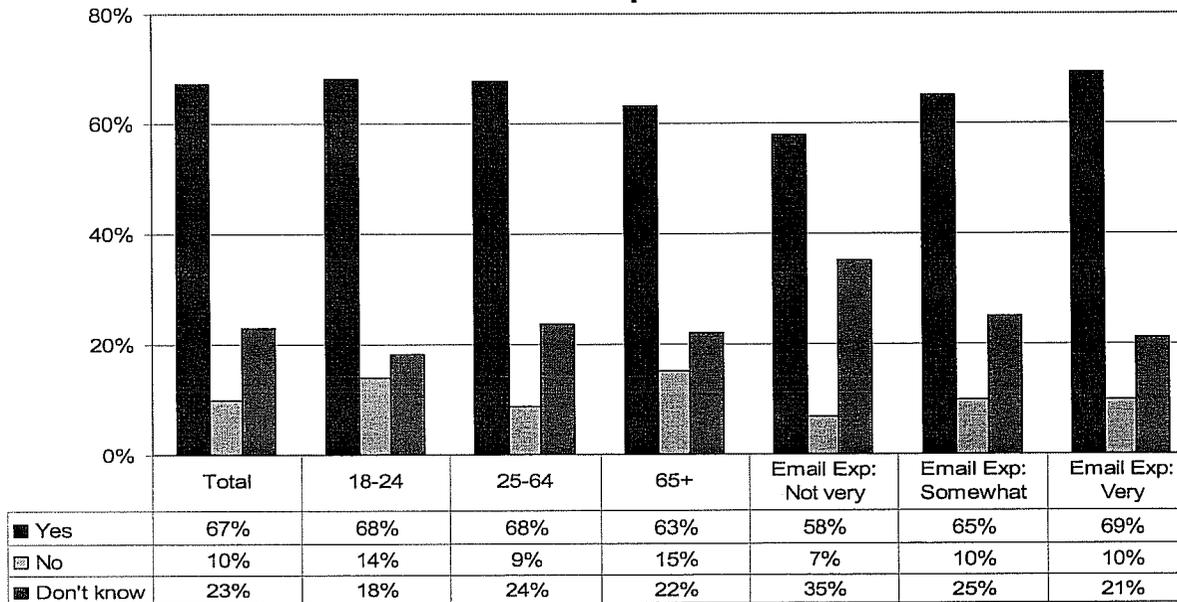


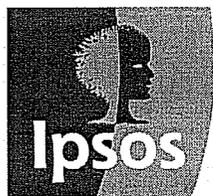


Sharing Fraud Info Across North America

- Nearly 70% of panelists believe that information gained from a Report Fraud button should be shared across North America. Inexperienced users were less likely to believe so.
- Q25. Do you think information received from the reporting buttons should be shared with trusted email senders in North America?

Q25 Share Report Fraud Button

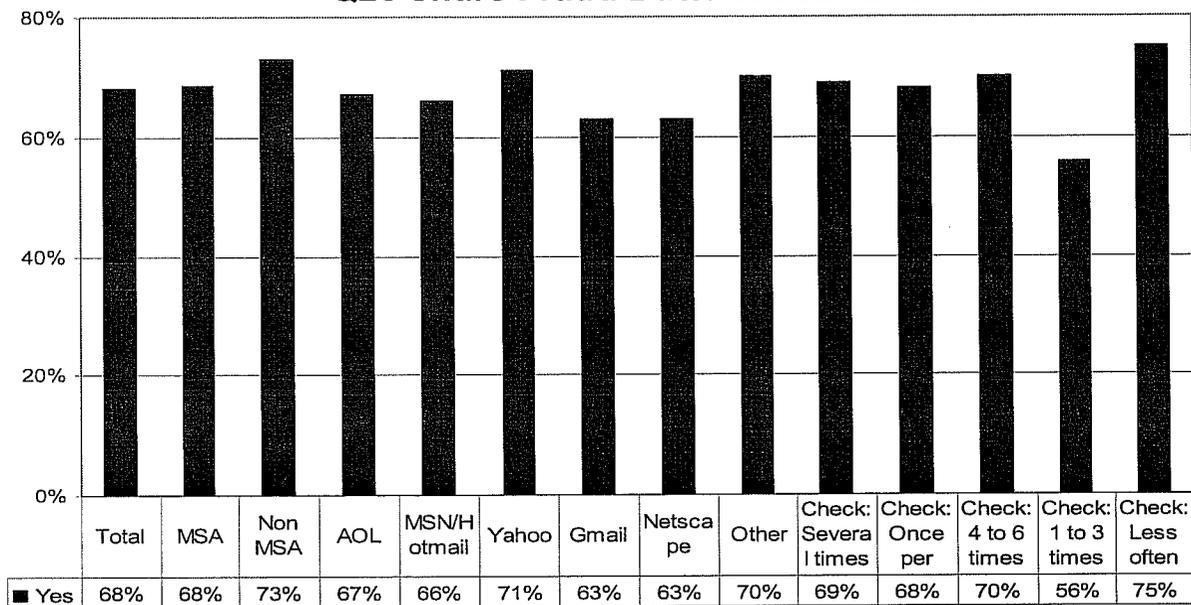


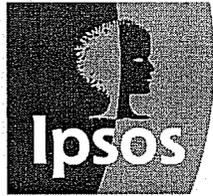


Sharing Fraud Info Around the World

- Nearly 70% of panelists also agreed that fraud information should be shared around the world.
- Q26. Do you think information received from the reporting buttons should be shared with trusted email senders around the world?

Q26 Share Fraud Button Around World

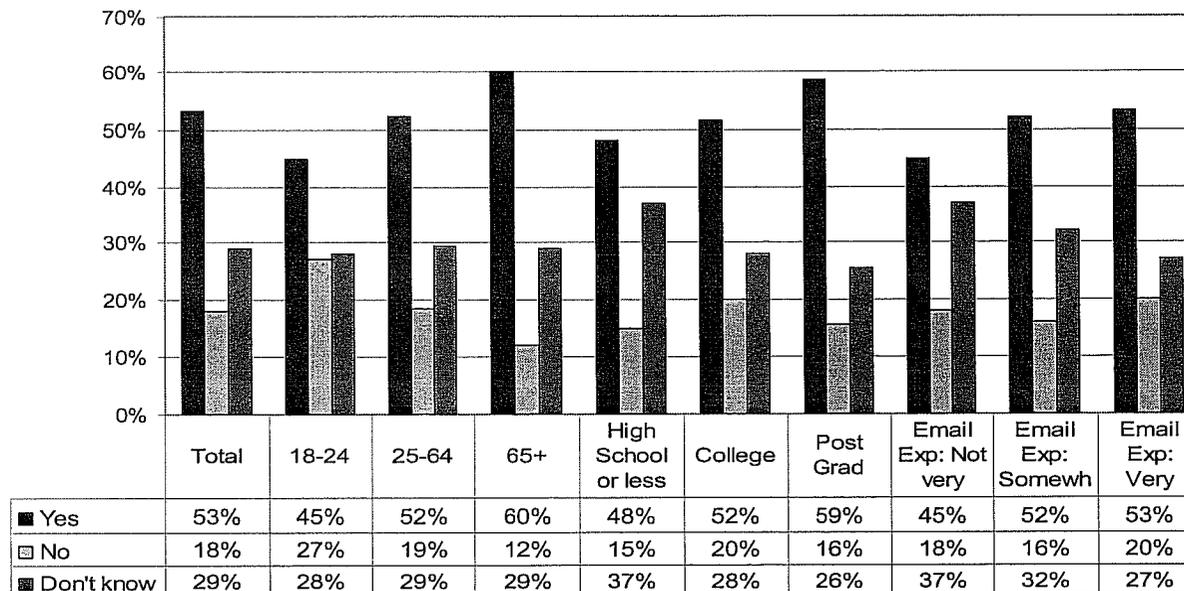


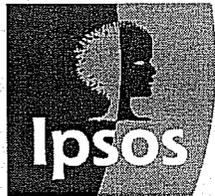


Reading Email Due to Certification Icon

- More than half of panelists would appreciate an icon in their email program indicating whether a company had certified email practices and would be more likely to open and read an email with such an icon. Older and more educated panelists were more likely to appreciate this.
- Q36. Consider a situation where a company's emailing practices were certified by a third party and that certification was indicated by your email provider with an icon in your inbox. Would you be more likely to open and read an email from them?

Open Due to Certification

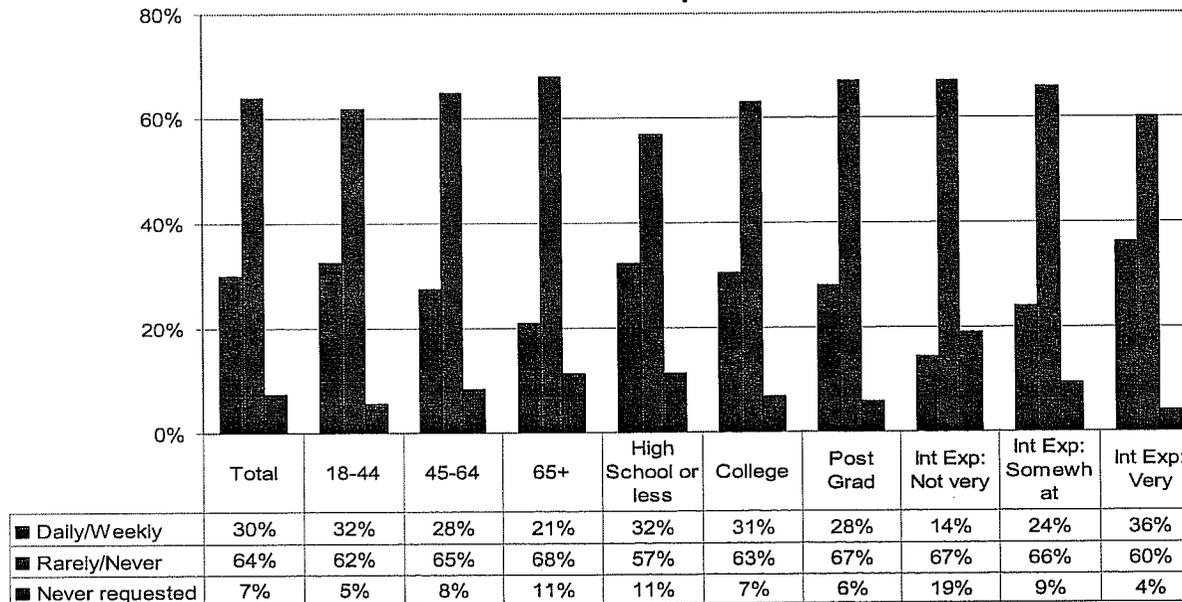


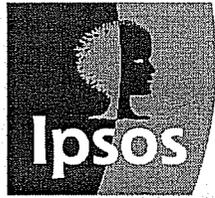


Frequency of Personal Messages in Spam Folders

- Normally, panelists rarely or never see messages that they've requested in their bulk boxes. But, more experienced internet users are more likely to see messages there.
- Q28. How often do you see messages you've requested in the spam/junk folder?

Q28 Check Spam Folder





Percent of Personal Messages in Spam Folders

- However, on the whole, most people find that they receive less than 5% of their desired messages in the spam folder. In fact, older panelists and inexperienced internet users are more likely to receive no desired emails in spam folders.
- Q29. Of all the messages in your spam/junk folder, what percentage of those messages should not be there because you requested them or wanted to receive them?

Q29 % Of Spam Folder Messages In Wrong Place

