

ESPC / Ipsos Email Survey Summary

Executive Overview:

In December 2006, the Email Sender and Provider Coalition (ESPC) conducted a survey in conjunction with marketing research firm Ipsos to provide insight into the email behaviors of today's consumers. The ESPC surveyed a random sample of 2,252 Internet users from top U.S. ISPs (AOL, MSN/Hotmail, Yahoo!, Lycos, Excite, Gmail, Netscape, Compuserve) in order to gauge consumers' behaviors and views toward spam, unsubscribe features and emerging anti-spam technologies.

The results showed that the average American is extremely email-savvy, and most have very specific opinions on email and spam and how to manage both. 73 percent of respondents have used email for six or more years and over 80 percent check their email at least once per day. Those surveyed also showed a familiarity and affinity for using "Report Spam" and "Unsubscribe" features, with over 80 percent of respondents using each of them to manage their inboxes.

Additionally, the results indicate a clear desire by consumers for greater support from ISPs, email providers, and marketers so that they can more easily control their mail experience. Most would like to see tools like "Unsubscribe" and "Report Fraud" buttons (90 percent and 80 percent respectively) added to their email programs. 53 percent of respondents claimed they would be more likely to open and read email if the sending company was certified with an icon displayed in the email inbox.

The message to senders and ISPs/mail program providers is clear. For senders, building trust and confidence are a priority, and these best practices should be followed:

- Give careful attention to the "FROM" address and "SUBJECT" line of emails.
- Make it easier to "unsubscribe" than to "report as spam."
- Use the information provided by recipients who report spam to understand WHY they are dissatisfied with your email program.
- Examine third-party options for certifying your practices.

For ISPs and mail program providers, providing more tools for consumers to control their inboxes is essential. These providers should consider:

- Adding "report fraud" and "unsubscribe" functions to the email interface. Further, consumers would support the sharing of fraud and spam data regionally and globally.
- Giving consumers the opportunity to provide more feedback on why they are reporting email as spam. Further, consider sharing that information with senders so they can reevaluate their mailing programs.
- Working with senders to provide options for notifying consumers that a sender's practices or reputation has been certified by a 3rd party in the inbox.

Results:

Both senders and receivers can walk away with important lessons from these survey results.

Reporting Spam:

The survey results indicate a high awareness and knowledge of the "Report spam" function and its purpose.

- Approximately 83 percent of respondents indicate that they have used a "Report Spam" button.
- 80 percent decide whether to click on the "Report Spam" or "Junk" button without opening the actual message;
 - 73% base the decision on "FROM"
 - 69% base the decision on "SUBJECT"
- 79 percent of panelists indicate they use the "Report Spam" button when they don't know who the sender is.
- Just 20 percent admit to using the "Report Spam" button as a quick way to unsubscribe.
- 66 percent were willing to provide additional information on why they were reporting something as spam

Unsubscribing:

Similarly, consumer responses indicate a familiarity and understanding of the unsubscribe process.

- 82 percent of panelists use the unsubscribe features provided when they want to stop receiving email from a company from which they had previously requested to receive email.
- Trust in unsubscribe is high with 71 percent of panelists indicating that they believe unsubscribe links work, and 48 percent of respondents reporting that they use unsubscribe links even when they don't recognize the sender.

Consumer views about their email programs:

Consumers clearly want more tools with which to fight spam and phishing threats.

- 90 percent of panelists indicate that they would appreciate having an "Unsubscribe" button built directly into their email program and indicated they would use such a feature if it were added to their email program
- 80 percent of panelists believe there should be a "Report Fraud" button in their email program.
- Nearly 70 percent believe that information gained from a "Report Fraud" button should be shared across North America; and further nearly 70 percent believe such information should be shared worldwide.

Consumer views about their Junk Folder:

Overall, panelists report that the mail they request to receive is not getting lost in their junk folders.

- 64 percent of panelists report that they rarely or never see messages that they've requested in their bulk boxes
- 80 percent of panelists report that 5 percent or less of their messages that they requested or wanted to receive land in the bulk folder.

Consumer views about certification of email:

Overall, consumers are looking for help in determining which senders they can trust.

- Generally, respondents would support senders having their practices and policies certified by 3rd parties.
- Respondents are considerably more likely to open and read email from senders whose practices are certified by a 3rd party and identified in the inbox with an icon. While 53 percent would be more likely to open and read such identified email, just 18 percent would not be more likely to open and read the message.

Conclusion:

Today's consumers are educated about email and, according to the results, very willing to use the functionality available to them to manage their email, and to provide specific feedback about their wants and needs for doing so. These email-savvy consumers have a strong voice and they want to make sure it gets heard when the big ISPs are developing email programs and anti-spam technologies. It is important that the industry as a whole listen to their needs to maintain their trust and ensure that email remains a viable channel for communication and commerce.

About the ESPC:

Formed in November 2002 to fight spam while protecting the delivery of legitimate email, the ESPC boasts a membership comprising many of the brightest and most innovative minds in the email industry, including Email Service Providers, Mail Transfer Agents, Internet Service Providers, application and solution developers, and deliverability solutions providers. The ESPC is composed of 75+ members including Axiom Digital; CheetahMail, an Experian Company; Constant Contact; Datran Media; ProspectivDirect; Return Path Inc. and StrongMail Systems, Inc. For more information, please visit www.espcalition.org/

About Ipsos:

Ipsos is a leading global survey-based market research company, owned and managed by research professionals. Ipsos helps interpret, simulate, and anticipate the needs and responses of consumers, customers, and citizens around the world.

Member companies assess market potential and interpret market trends. They develop and build brands. They help clients build long-term relationships with their customers. They test advertising and study audience responses to various media. They measure public opinion around the globe.

Ipsos member companies offer expertise in advertising, customer loyalty, marketing, media, and public affairs research, as well as forecasting, modeling, and consulting. Ipsos has a full line of custom, syndicated, omnibus, panel, and online research products and services, guided by industry experts and bolstered by advanced analytics and methodologies. The company was founded in 1975 and has been publicly traded since 1999. In 2005, Ipsos generated €717.9 million (\$853.8 million U.S.) in total revenues, of which 34 percent came from its North American operations. Visit www.ipsos.com to learn more about Ipsos' offerings and capabilities.