

Consumer Attitudes Toward Spam in Six Countries






December 9, 2004

Survey of 6,000 Internet Users by Forrester Data




for the

Business Software Alliance

Methodology

-  Survey questions were developed by Forrester Data in collaboration with BSA
-  Surveyed at least 1,000 online consumers in each country:
 - Brazil
 - Canada
 - France
 - Germany
 - U.S.
 - U.K.
-  Data weighted to be representative of all online consumers in each respective country
-  Survey was in the field in mid-November 2004
-  Study conducted by Forrester Data and commissioned by the Business Software Alliance

Agenda

-  How many consumers receive and read various types of spam?
-  Do consumers make purchases as a result of the spam they receive?
-  What attitudes do people have about buying commercial software from spam?

Profile of respondents in each country



Brazil

- Percent female: 51%
- Average age: 31



Canada

- Percent female: 49%
- Average age: 36



France

- Percent female: 47%
- Average age: 33



Germany

- Percent female: 42%
- Average age: 35



U.K.

- Percent female: 45%
- Average age: 34



U.S.A.

- Percent female: 51%
- Average age: 35

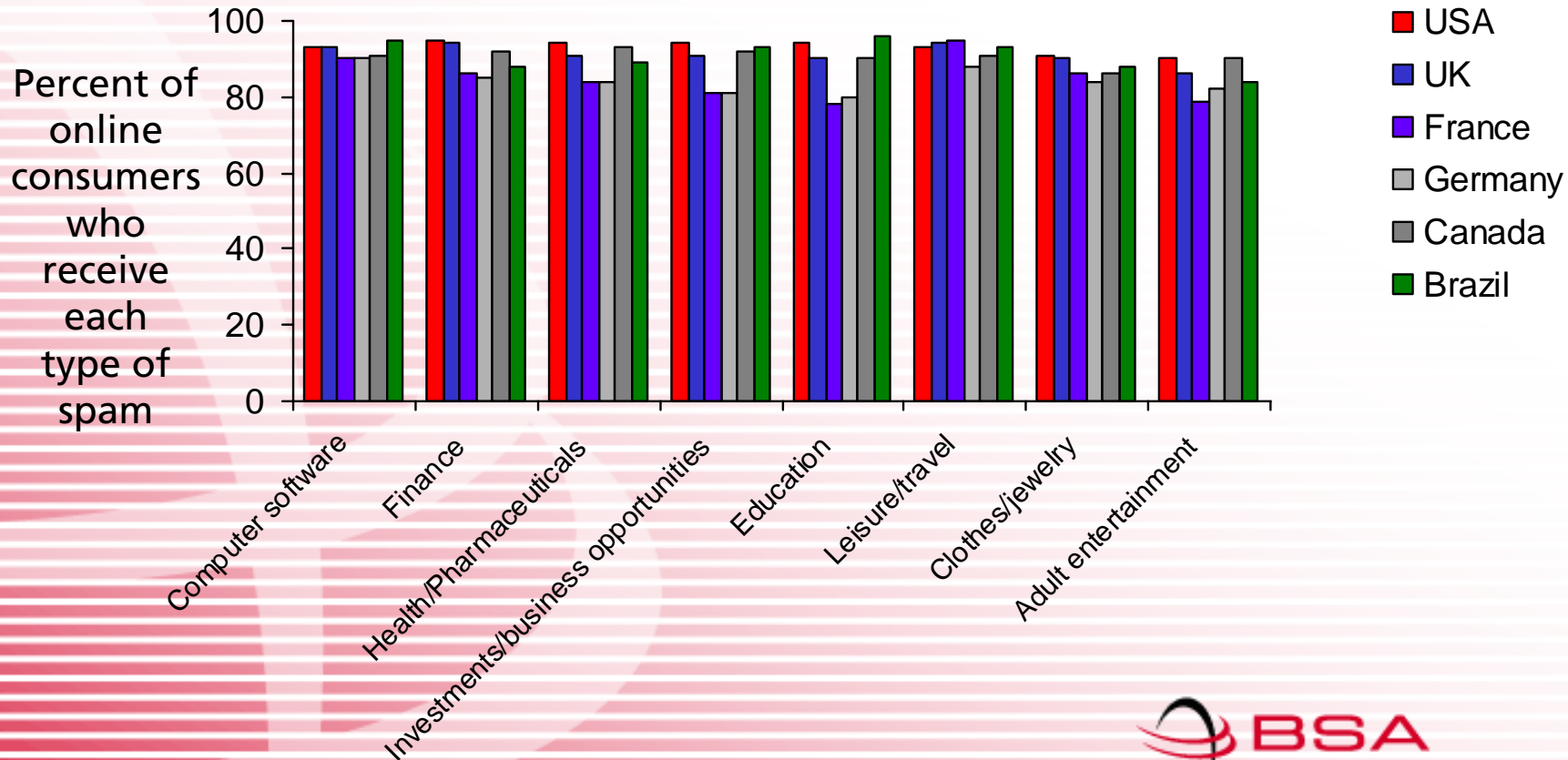
*Incomes have different scales, so should not be directly compared across different countries.



How many consumers in different countries receive and read various types of spam?

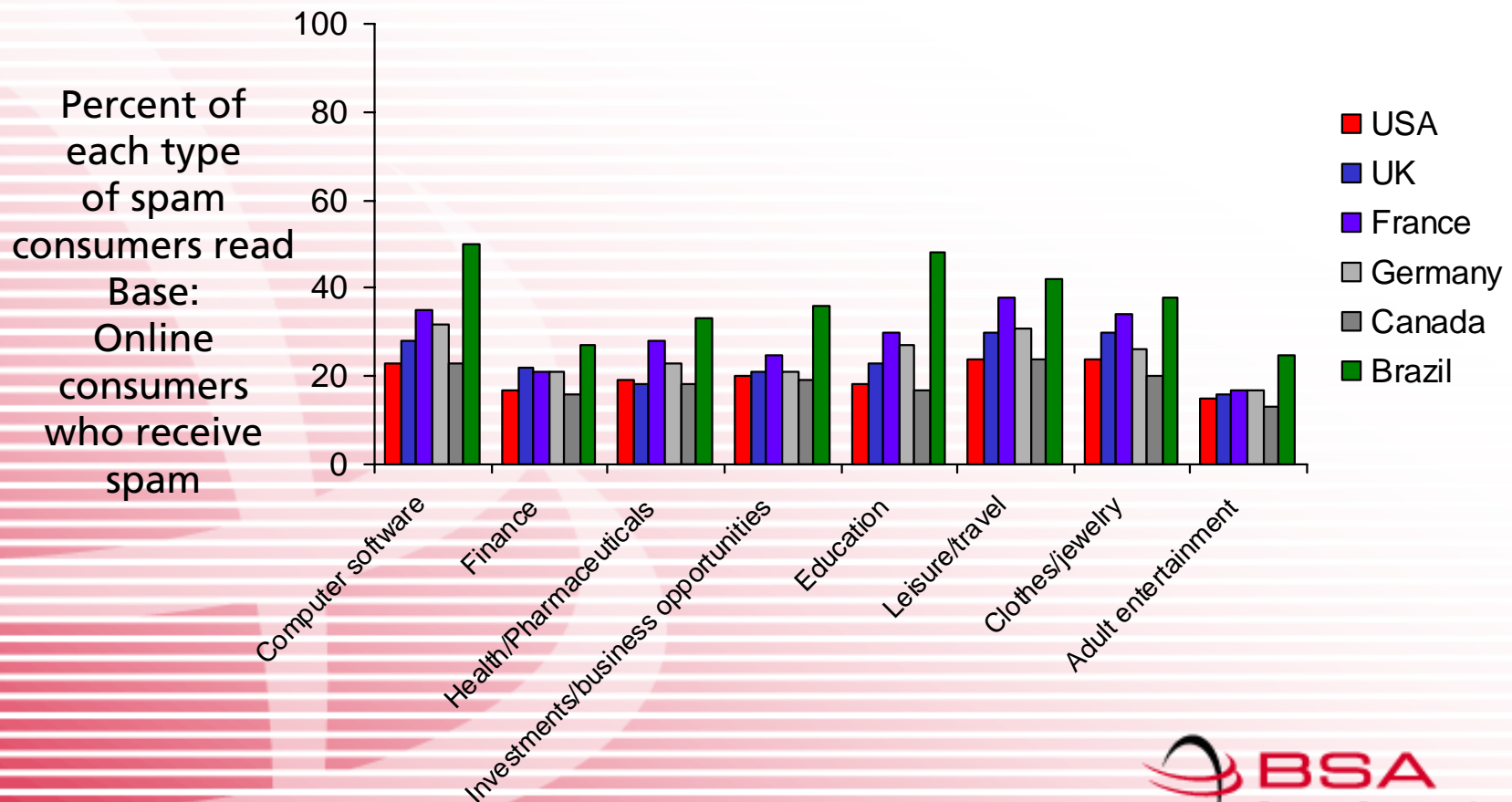
Nearly all online consumers in each country receive a wide variety of spam

“Which of the following types of commercial emails do you receive, but did not request or sign up for (also known as spam)?”



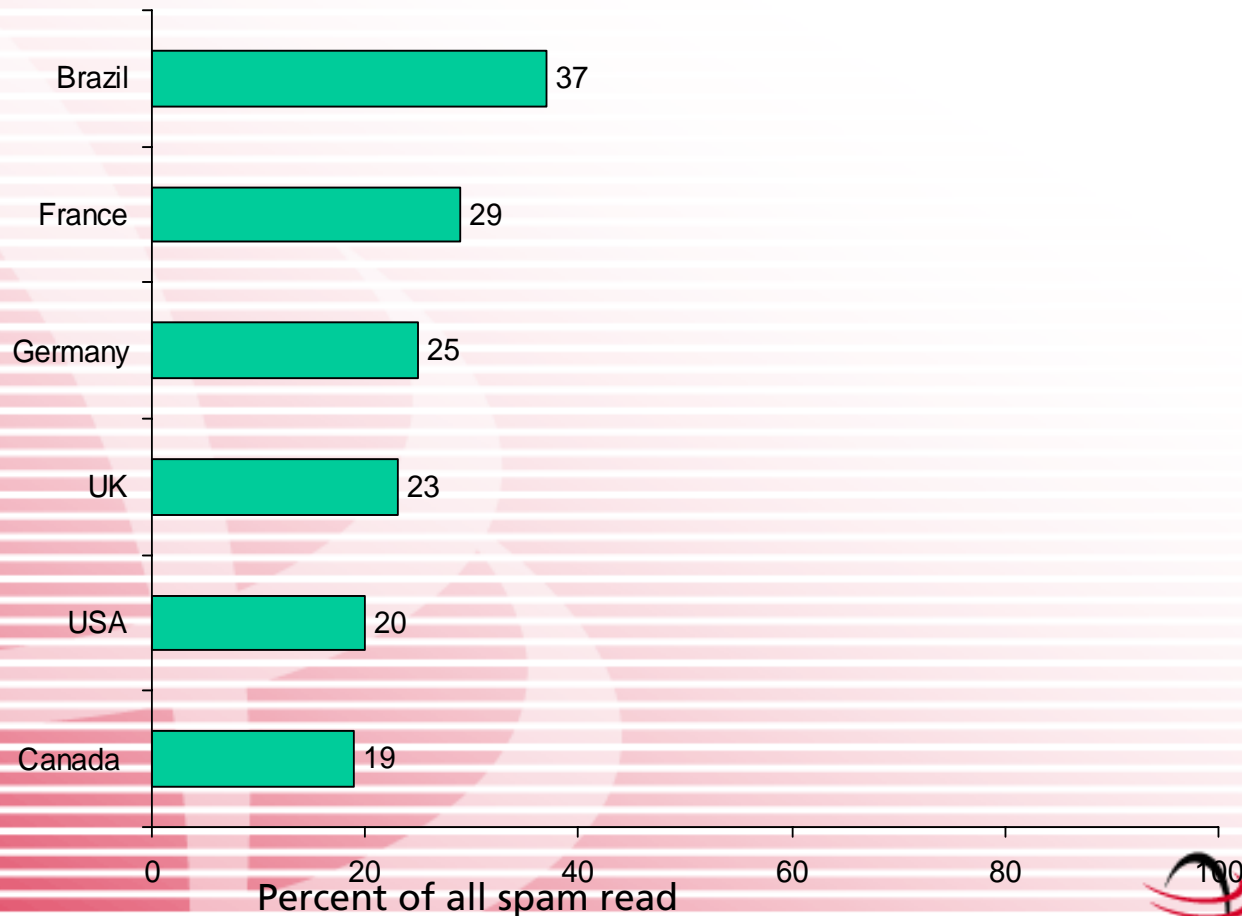
Consumers in Brazil read the greatest percent of the spam they receive

“What percent of the following types of commercial emails that you receive, but did not request or sign up for (also known as spam), do you read?”



Brazilians read just over one-third of the spam they receive

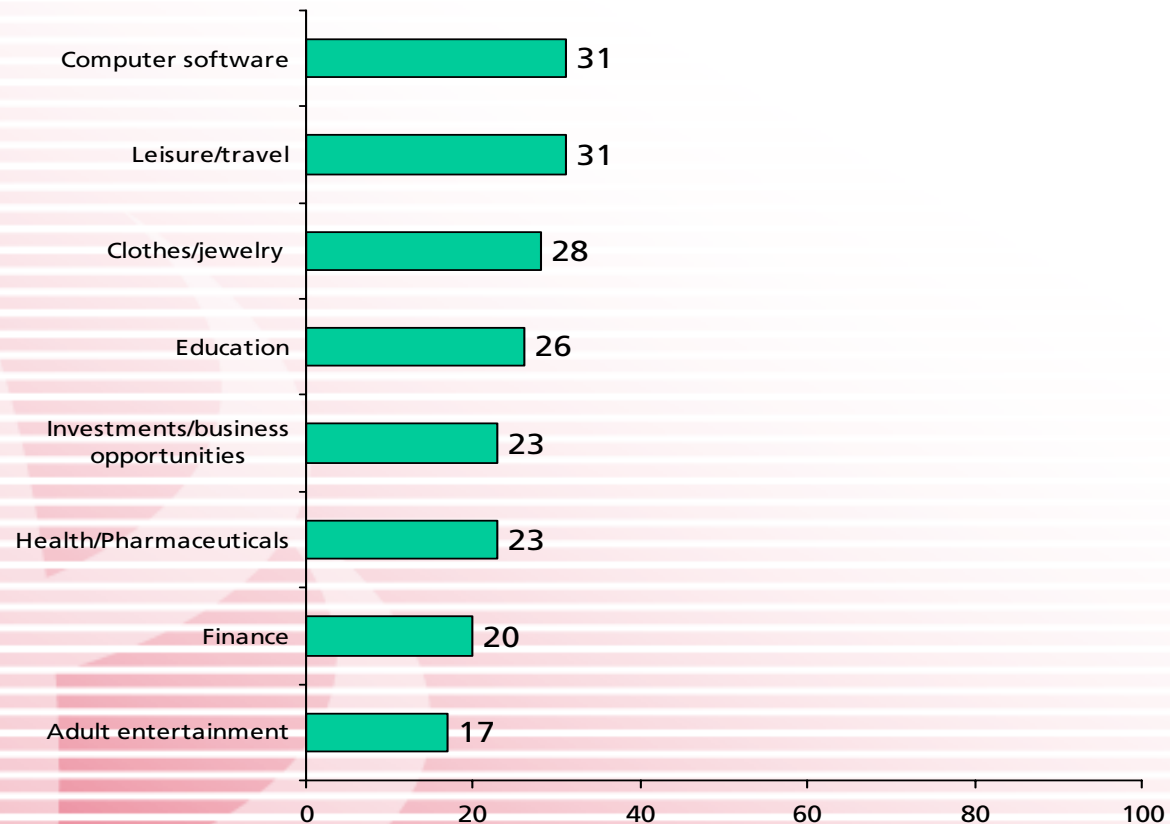
“What percent of the commercial emails that you receive, but did not request or sign up for (also known as spam), do you read?”



Base: Online consumers who receive spam


Consumers across the various countries are most likely to read software or leisure/travel spam

“What percent of the following types of commercial emails that you receive, but did not request or sign up for (also known as spam), do you read?”



Percent of each type of spam consumers read

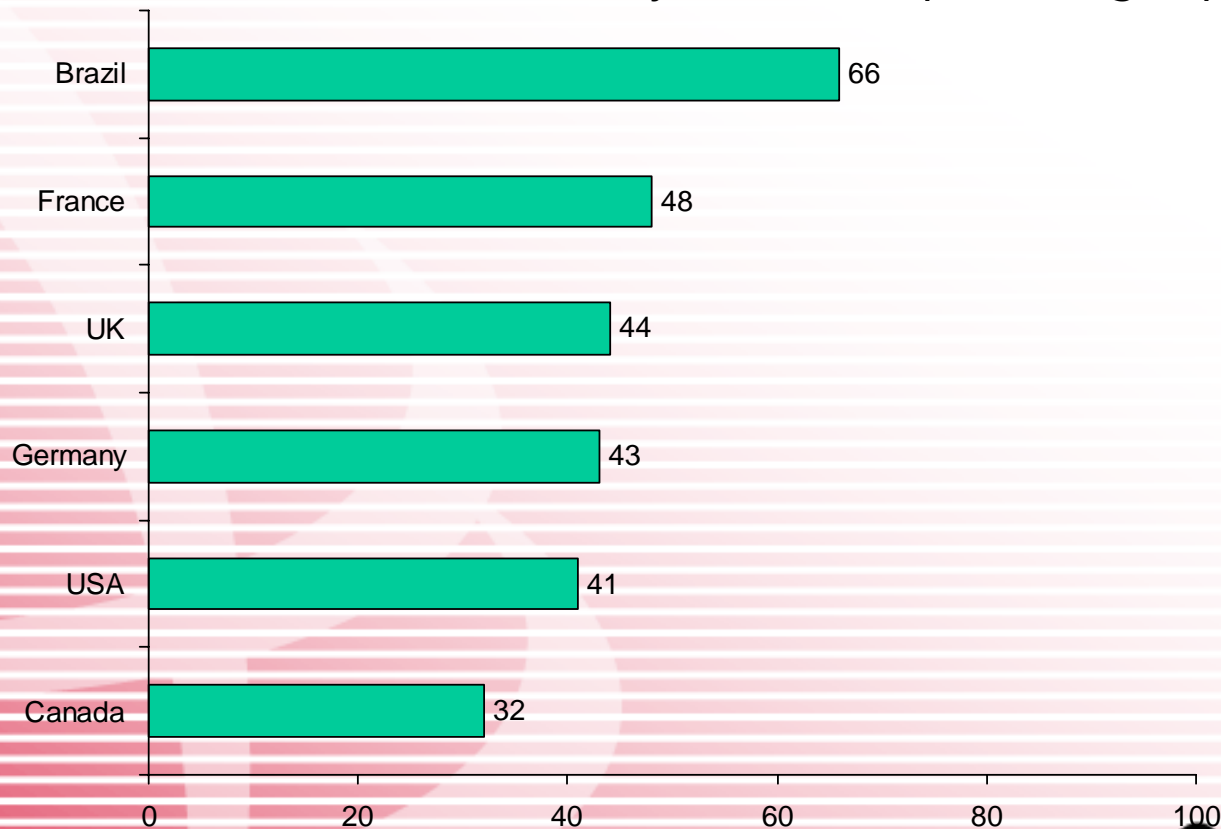
Base: Online consumers who receive spam



Do consumers in different countries make purchases as a result of the spam they receive?

Brazilians are also the most likely group to purchase a product or service from spam

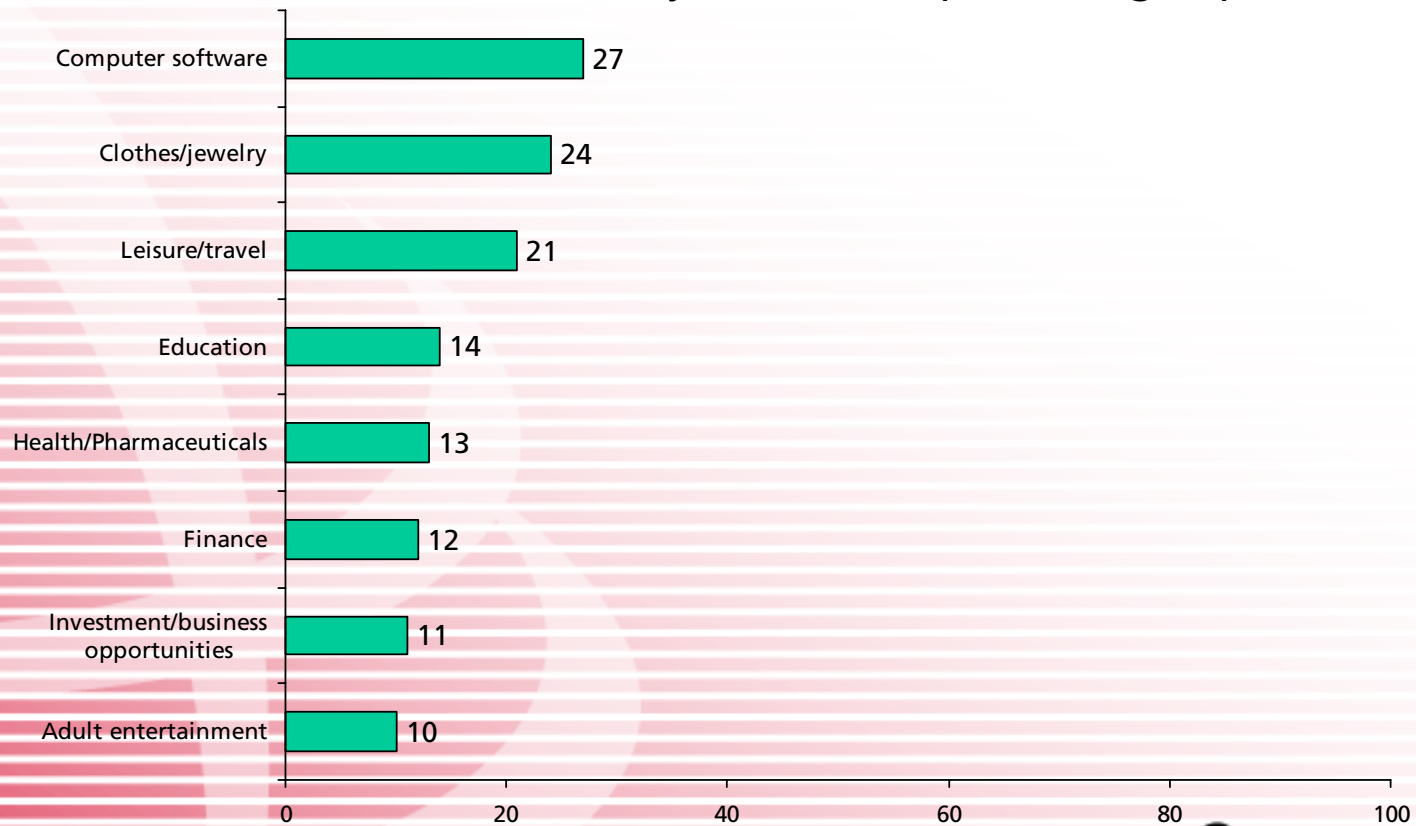
“Please indicate if you have ever purchased an item or taken advantage of an offer for a product or service from an email you didn’t request or sign up for.”



Percent of online consumers who have purchased an item through an unsolicited email

Computer software is among the most purchased items through spam

“Please indicate if you have ever purchased an item or taken advantage of an offer for each of the following products or services from an email you didn’t request or sign up for.”

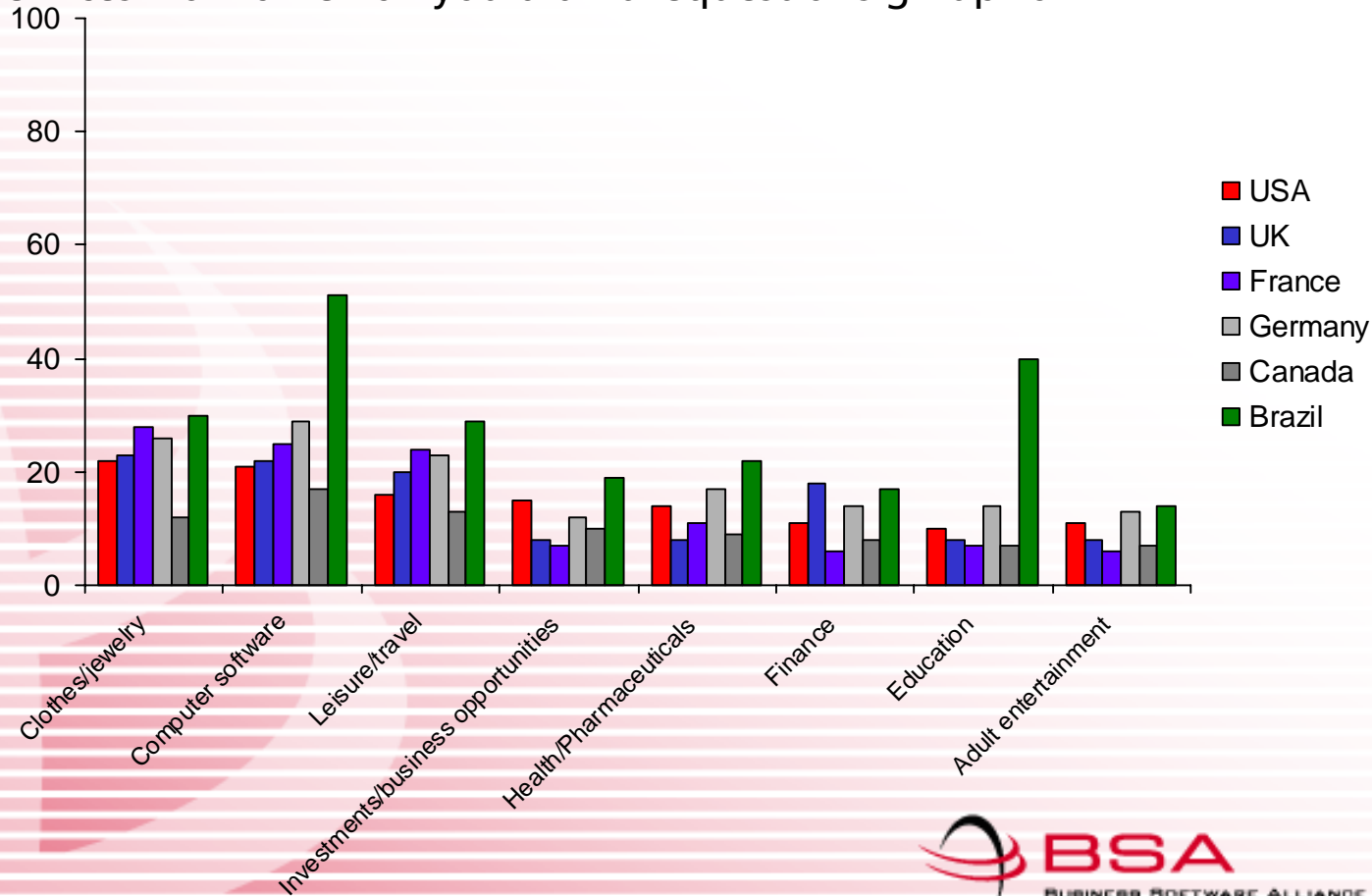


Percent of online consumers who have purchased item through an unsolicited email

Consumers are most likely to purchase software and apparel/jewelry through spam they receive

“Please indicate if you have ever purchased an item or taken advantage of an offer from each of the following types of products or services from an email you didn’t request or sign up for.”

Percent of online consumers who have purchased an item through that type of spam
Base: Online consumers

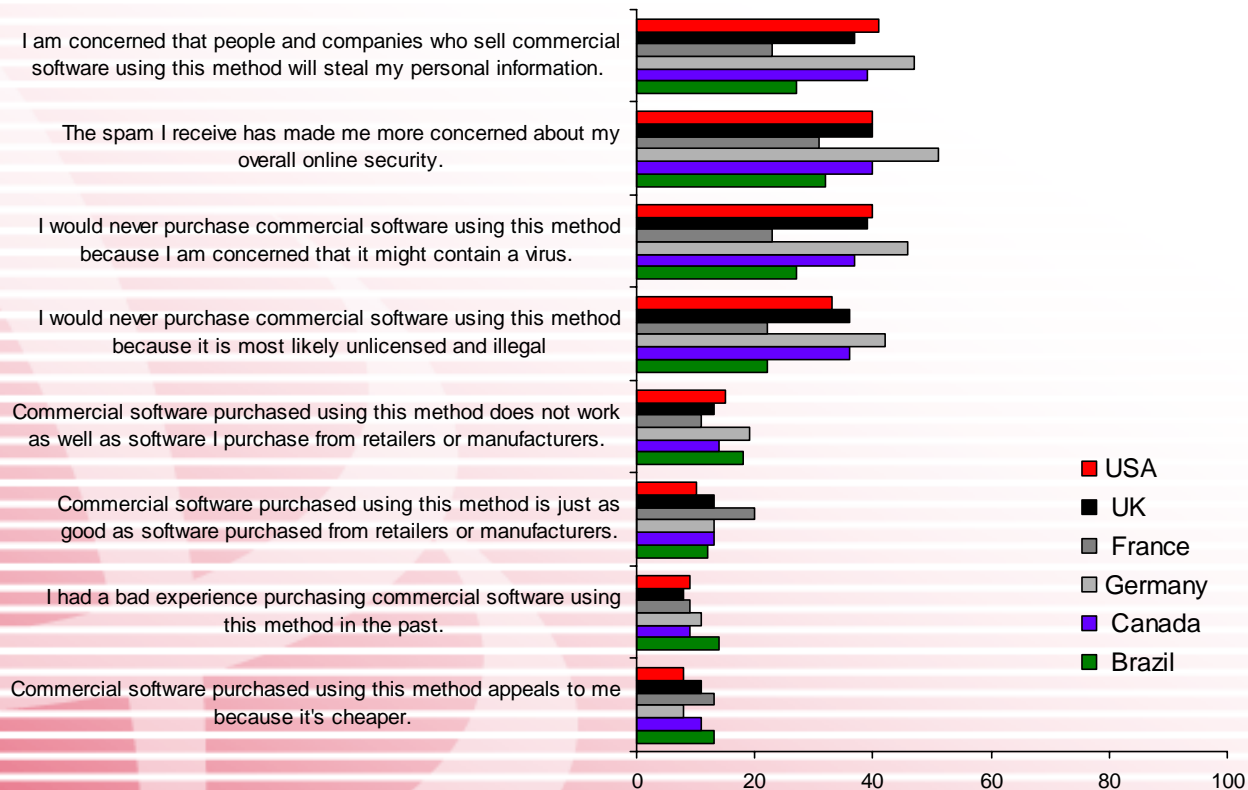




What attitudes do people in different countries have about buying commercial software from spam?

Software for sale through spam raises personal, computer, and legal security concerns

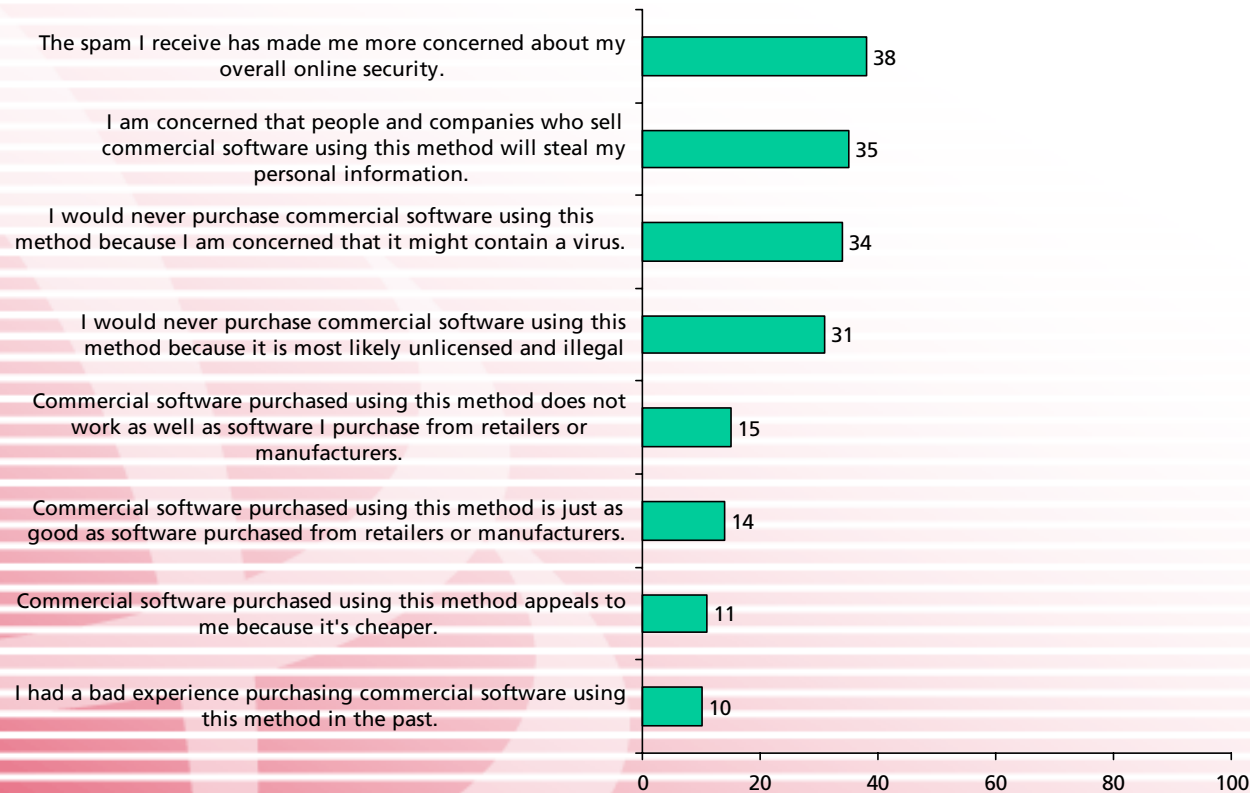
“Which of the following attitudes about buying commercial software through *an unsolicited email*, if any, apply to you?”



Percent of online consumers who agree with statement
(multiple responses accepted)




Software for sale through spam raises personal, computer, and legal security concerns

“Which of the following attitudes about buying commercial software through ***an unsolicited email***, if any, apply to you?”



Percent of online consumers who agree with statement
(multiple responses accepted)

Summary

-  Nearly all online consumers receive all kinds of spam.
-  Online consumers are more likely to read and purchase items from software spam than from other types of spam.
-  Software available through spam increases consumers' online security concerns.