

# **2003 SURVEY ON UNSOLICITED E-MAILS**

## **KEY FINDINGS**

### **INTRODUCTION & METHODOLOGY**

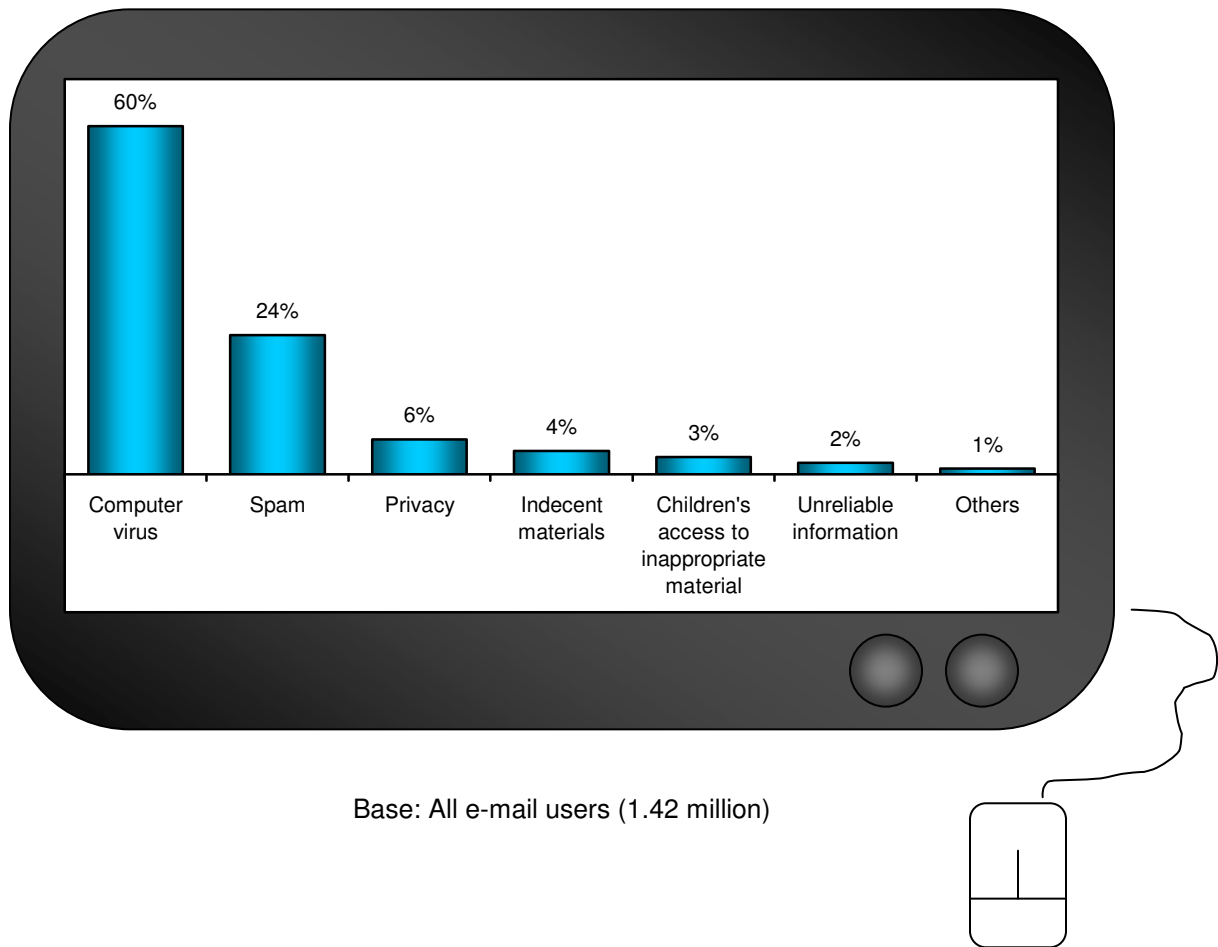
1. The Survey on Unsolicited E-mails was an ad-hoc survey commissioned by IDA to Precision Research in October 2003 to understand the nature and extent of e-mail spam in Singapore. For the purpose and intent of this report, "Unsolicited E-mails" is referred to as "Spam".
2. The target respondents of the survey were Singapore citizens and PRs aged 15 years and above, who were e-mail users at the time of the survey.
3. A total of 1,005 e-mail users from 1,549 households were interviewed face-to-face at their homes. Fieldwork was conducted between 17<sup>th</sup> October 2003 and 17<sup>th</sup> November 2003. The findings were extrapolated to the whole resident population of Singapore aged 15 years and above.

## EXTENT OF THE PROBLEM OF E-MAIL SPAM

4. It is estimated that there are a total of 1.4 million e-mail users in Singapore aged between 15 years and above. Almost all e-mail users have received spam (94%). For the average spam recipient<sup>1</sup>, spam accounted for almost 1 out of every 3 e-mails received per day.

60% of e-mail users cited computer viruses as their most important concern when using the Internet, while 24% of e-mail users cited spam as their most important concern.

**Figure 1: Most Important Concern When Using The Internet**



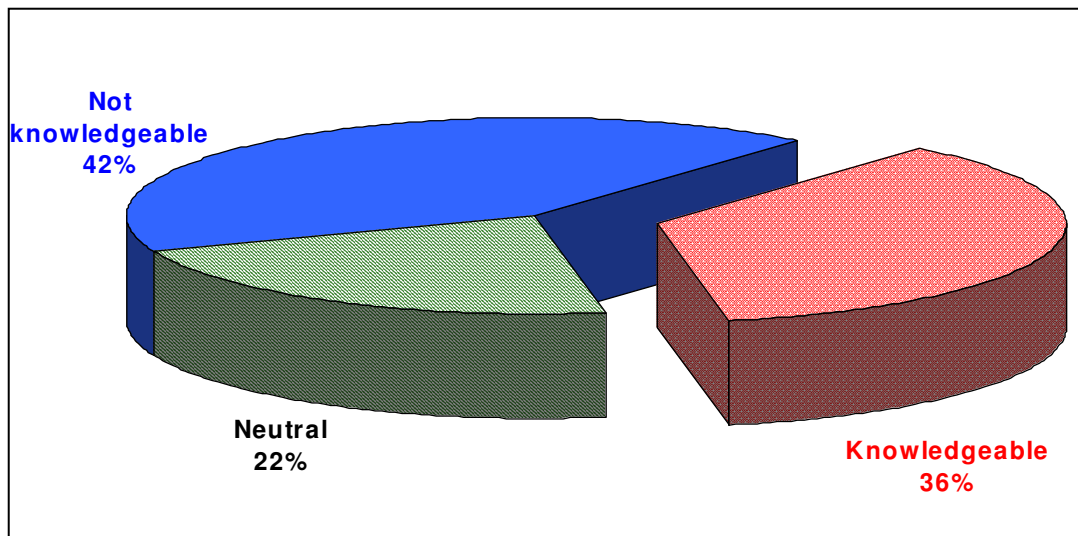
<sup>1</sup> Spam recipients are e-mail users who have ever received spam. The number of spam recipients in Singapore is estimated to be 1.33 million (or 38.7% of Singapore resident population).

5. The majority of spam recipients (71%) spent less than 5 minutes per day on handling spam.
6. The annual productivity loss due to handling spam (e.g. opening the spam e-mails and deleting them) by e-mail users in Singapore is estimated at about \$1.9 million per month or approximately \$23 million per year<sup>2</sup>. This works out to \$16 per e-mail user per year.
7. On average, spam from overseas-based companies formed about 77% of the total spam received.

### MANAGING SPAM

8. Slightly over half of spam recipients claimed that they had knowledge of how to protect their e-mail against spam, 36% claimed that they were knowledgeable while 22% said that they had adequate knowledge only.

**Figure 2: Extent of Knowledge to Protect Against Spam**

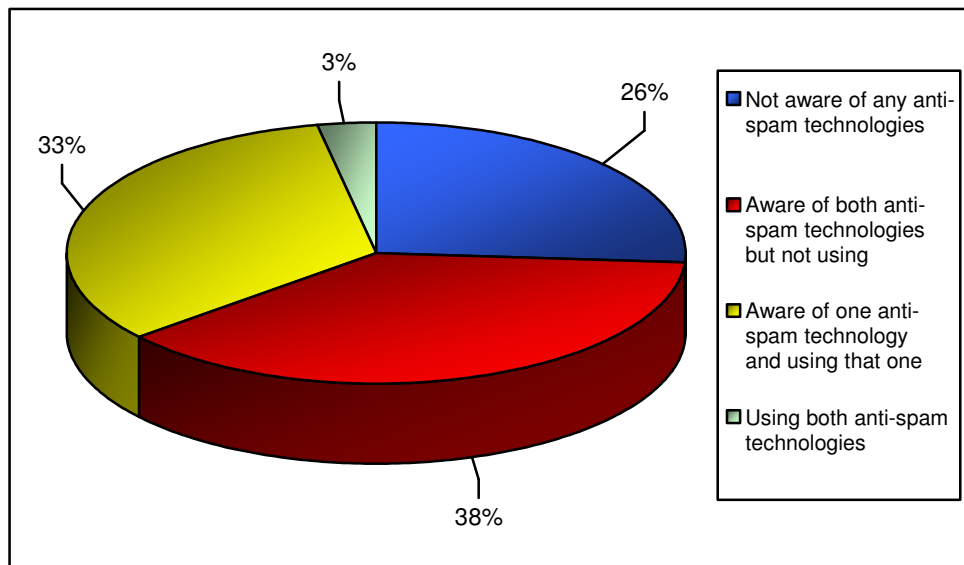


Base: All spam recipients (1.33 million)

<sup>2</sup> Cost of spam = Time spent on handling spam x salary per hour.

9. The majority of spam recipients (74%) were aware of at least one anti-spam technology i.e. filtering function<sup>3</sup> or independent anti-spam software<sup>4</sup>. Of this percentage, spam recipients who were aware of filtering function outnumbered those who were aware of independent anti-spam software by 3 to 1 (72% versus 24%). However, only about one-third of spam recipients who were aware of anti-spam technology (36%) used at least one of the technologies.

**Figure 3: Awareness and Usage of All Anti-Spam Technologies**



Base: All spam recipients (1.33m)

10. 58% of spam recipients who claimed that they were not knowledgeable about protecting their e-mails against spam were also unaware of anti-spam technologies. In comparison, only 16% of spam recipients who claimed they were knowledgeable about protecting their e-mails against spam were unaware of anti-spam technologies.

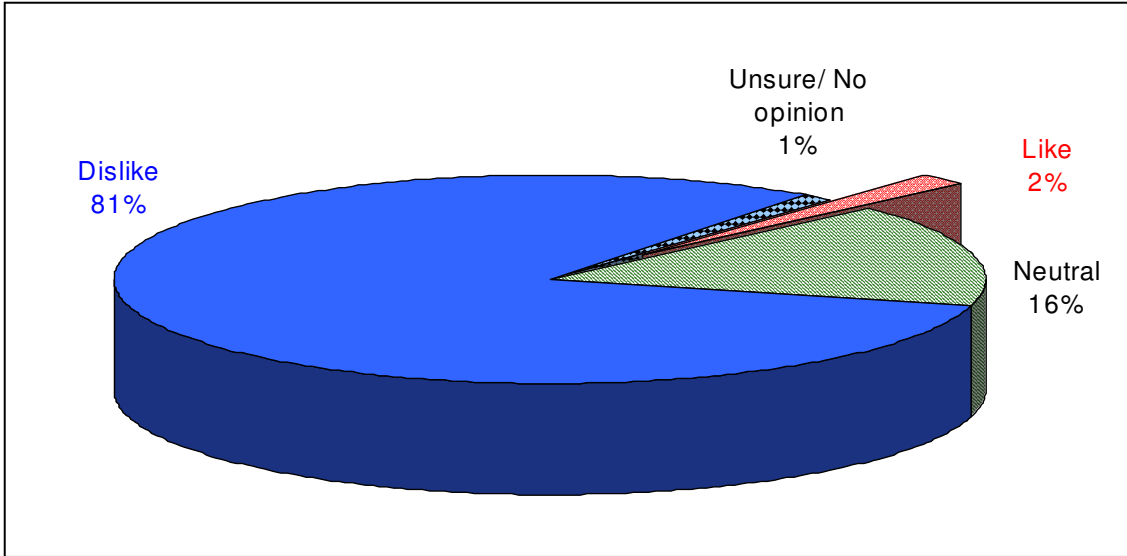
<sup>3</sup> Filtering function refers to a service provided by e-mail service providers along with your e-mail account, which automatically filters unsolicited e-mail when you select to use it.

<sup>4</sup> Independent software refers to commercial software that helps filter unsolicited e-mails, e.g., Cloudmark Spam Net, Mailwasher, Spamkiller.

## ATTITUDE TOWARDS SPAM

12. The majority of e-mail users (81%) disliked receiving spam.

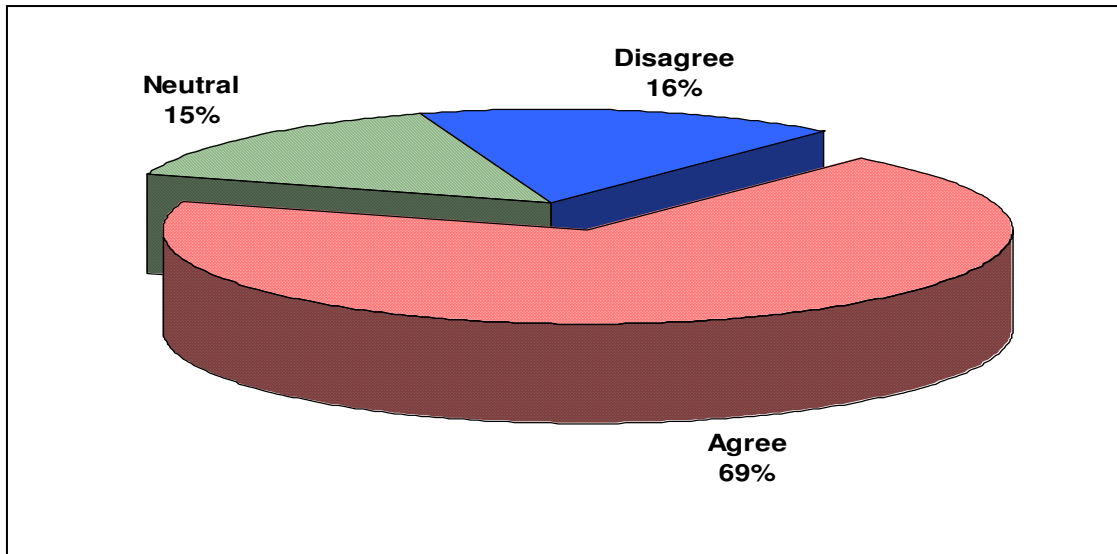
**Figure 4: Sentiments on Receiving Spam**



Base: All e-mail users (1.42m)

13. The majority of e-mail users (69%) perceived that the number of spam they received has been increasing over the years.

**Figure 5: Number of Spam Received Is Increasing Over the Years**



Base: All spam recipients (1.33m)

14. The majority of e-mail users (80% - 1.14m e-mail users) believe it spam or non-spam recipients felt that the sending of unsolicited e-mails should be prohibited unless it takes place within an existing customer-business relationship or these e-mails provide a genuine unsubscribe option.

15. In summary, spam is becoming a major problem in Singapore affecting 94% of e-mail users. Spam is costing Singaporean e-mail users as much as \$23 million per annum in productivity loss. The public awareness on how to protect their e-mail against spam is low. Majority of e-mail users dislike spam and perceived spam to be a growing problem.