

# ISP Deliverability Report Card

## Q1 2007

### Executive Summary

Contrary to popular belief among marketers, message content is not a major cause of deliverability challenges for most email marketers. This finding is a result of testing the content of more than 1,705 unique emails, using EmailAdvisor's content scoring tool. The content scoring function is based on the content scoring rules of the widely adopted Spam Assassin open source project. The emails tested had an average content point score of 1.04 well below the filter's generally accepted spam identification level of 3.0 or higher.

Of the emails subjected to content scoring, two frequently triggered Spam Assassin rules generated content filter point scores of significance, however these should be easily correctable for most marketers. The first rule cautions against heavy use of images, which can increase spam scores up to a full point and render poorly in email clients with image blocking enabled. The second problem, sending messages with a "From Name" composed of numbers or symbols rather than an actual name, can also increase the likelihood of the message being flagged as spam and ending up in users' junk/bulk folders.

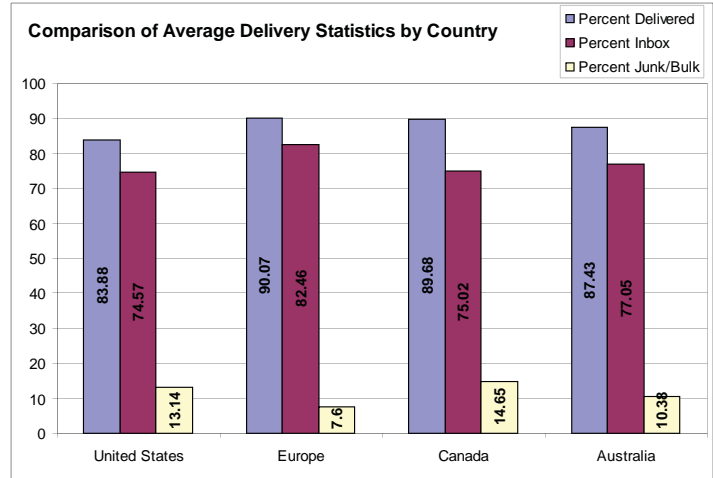
### Inbox Delivery Still a Challenge

Of the 25 U.S. ISPs tracked by the EmailAdvisor Report Card, several leading providers rank near the top of the list of domains with the highest rates of delivery to the junk folder rather than to the inbox. These include Gmail (3rd with 28 percent), Yahoo! (4th with 19 percent), and Hotmail (6th with 16 percent). Noticeably absent from the top ten ISPs with the worst inbox delivery is AOL, which ranked 14th on the list with a junk delivery rate of only 2.33 percent.

For the study's top-ten-ranked U.S. ISPs, gross deliverability was more than 90 percent in all cases, with average deliverability of 83.8 percent across the sample. CompuServe had the highest rate of inbox delivery at 88 percent, with the remainder of the top-ten-ranked ISPs achieving delivery rates of more than 81 percent in all cases. Among international ISPs, European ISPs performed the best, followed by Australian, Canadian and finally U.S. domains—although the disparities between regions were all within +/- five percentage points.

## Deliverability Comparison by Country

In this quarter, gross delivery and inbox delivery among U.S.-based ISPs still rank lower than their European, Canadian and Australian counterparts. Marketers sending to U.S.-based ISPs still have to contend with an average of more than 13% of permission-based mailings sent to junk or bulk folders.



## United States

- Of the 25 U.S. ISPs reported on, several of the leading consumer ISPs rank among the domains with highest rates of email delivery to junk/bulk folders rather than to the inbox. These ISPs include Gmail (3rd), Yahoo! (4th), and Hotmail (6th). A top ISP with much better delivery was AOL, which ranked 14th on the list with only 2.33% of email being delivered to the junk/bulk folders.
- While average gross deliverability is around 83.8% for permission-based marketing, all of the top-ten ISPs delivered more than 90% of email received. The lowest delivery rate was seen at Lycos, where only 41.7% of email was received—this is almost 29% lower than the next-worst ISP, AT&T, which delivered 70.8% of all messages.
- While marketers are struggling to improve the overall delivery of their emails, inbox delivery is still the key challenge. CompuServe which had the highest inbox delivery rate still only achieved 88% inbox delivery. The other top-ten ISPs all had inbox placements in the 80% range. Hotmail scored third from the bottom with only 58.4% of delivered messages reaching the inbox.

1 Top Ten US Domains by Gross Deliverability		
Rank	ISP Name	Percent Delivered
1	IWon	96.97
2	Yahoo!	94.80
3	Google Mail	94.65
4	XO Concentric	94.27
5	USA	93.59
6	SBC Global	92.24
7	PeoplePC	91.28
8	Earthlink	91.27
9	Bell South	90.71
10	AOL	90.06
<b>AVG</b>		<b>83.88</b>

2 Top Ten US Domains by Inbox Deliverability		
Rank	ISP Name	Percent Inbox
1	CompuServe	88.09
2	AOL	87.73
3	Juno	87.07
4	NetZero	86.72
5	Earthlink	85.75
6	PeoplePC	84.60
7	Mail.com	84.05
8	IWon	83.86
9	USA	83.26
10	Mac	81.76
<b>AVG</b>		<b>74.57</b>

## Content Not Seen to Be the Cause of Delivery Challenges

Running 1,700 messages through EmailAdvisor's content score\* feature showed the average content point score was 1.04—well below the generally used score for identifying spam of 3.0 or higher. Compared to the top ten types of content that most frequently trigger spam and their associated scores, we saw only two spam triggers with any significant point scores. These should act as guides to marketers for how to reduce the likelihood of their message being flagged as spam by content filters.

The table below displays the most frequently triggered content rules in our analysis and their associated scores. The two highlighted rules had the highest point scores and were also triggered most often.

### Most Frequently Triggered Content Scores

Name	Description	Score
HTML_MESSAGE	HTML included in message	0
ALL_TRUSTED	Did not pass through any untrusted hosts	-1
MIME_HTML_ONLY	Message only has text/html MIME parts	0.41
HTML_90_100	Message is 90% to 100% HTML	0.58
HTML_FONT_BIG	HTML tag for a big font size	0.26
HTML_TAG_EXIST_TBODY	HTML has "tbody" tag	0.28
FORGED_RCVD_HELO	Received: contains a forged HELO	0.14
HTML_IMAGE_RATIO_04	HTML has a low ratio of text to image area	1.06
NO_REAL_NAME	From: does not include a real name	0.96
HTML_WEB_BUGS	Image tag intended to identify you	0.33

Heavy use of images not only renders poorly in clients with image blocking, but increases spam scores by a full point and can be a reason that marketers see their messages delivered to junk/bulk folders particularly at corporations that filter on content more than do ISPs. The second problem, "From Names" that don't include a real name but rather numbers or symbols, can also increase the likelihood of content filters flagging a message as spam.

\* The content score feature utilizes the Spam Assassin rule set (a Bayesian filter that applies point values to multiple possible spam-related signatures and sums to an aggregated point total for decision making purposes) to determine the overall content score, indicating the likelihood that an email would be considered "spam."

## Europe

- Average deliverability at European-based ISPs ranks higher than their U.S. counterparts by almost 7 percentage points and slightly higher than Canadian and Australian ISPs by 0.5 and 2.5 percentage points respectively. (See Country Comparison Chart)
- All of the top ten ISPs delivered over 91.7% of permission-based email, with NTLWorld in the UK delivering more than 97.8% of email and 94% of that going to the inbox.
- The ISP with the lowest delivery rates was GMX from Germany, with only 71% of email being delivered.
- Average inbox delivery scores were also higher for European-based ISPs, with 82.4% of email being routed correctly to the inbox, compared to only 74.5% for U.S.-based ISPs.
- European ISPs also had the lowest percentage of junk/bulk folder delivery at only 7.6%, compared to the U.S. at 13.1%

3 US Domains with Highest Delivery to Junk/Bulk Folder Deliverability		
Rank	ISP Name	Percent Junk/Bulk
1	XO Concentric	48.34
2	Bell South	28.29
3	Google Mail	27.75
4	Yahoo!	18.61
5	SBC Global	18.22
6	Hotmail	16.16
7	MSN Network	15.83
8	IWon	13.11
9	USA	10.33
10	Verizon	7.31

**AVG 13.14**

4 Top Ten EU Domains by Gross Deliverability		
Rank	ISP Name	Percent Delivered
1	NTLWorld (UK)	97.86
2	Yahoo! (Spain)	97.69
3	BT (UK)	97.11
4	Nildram (UK)	95.87
5	AOL (UK)	95.41
6	Demon (UK)	94.51
7	T-Online (Germany)	92.97
8	Tiscali (France)	92.54
9	WEB.de (Germany)	91.87
10	Yahoo! (Germany)	91.74

**AVG 90.07**

## Europe cont.

5 Top Ten EU Domains by Inbox Deliverability		
Rank	ISP Name	Percent Inbox
1	Nildram (UK)	95.87
2	Demon (UK)	94.51
3	NTLWorld (UK)	94.00
4	T-Online (Germany)	92.97
5	Tiscali (France)	92.54
6	WEB.de (Germany)	91.87
7	Tiscali (Italy)	91.00
8	Tiscali (UK)	90.23
9	freenet.de (Germany)	89.34
10	Virgin.net (UK)	87.92
AVG		82.46

6 EU Domains with Highest Delivery to Junk/Bulk Folder		
Rank	ISP Name	Percent Junk/Bulk
1	Orange (UK)	28.82
2	Hotmail (UK)	21.68
3	Yahoo! (Italy)	18.85
4	Yahoo! (Germany)	18.52
5	Yahoo! (France)	16.57
6	Yahoo! (UK)	14.60
7	Yahoo! (Spain)	13.89
8	BT (UK)	13.68
9	AOL (UK)	9.13
10	NTLWorld (UK)	3.86
AVG		7.60

## About EmailAdvisor

EmailAdvisor from Lyris Technologies is a leading deliverability monitoring solution. Features include Inbox Snapshot which shows how emails render in more than 50 email clients; Delivery Monitor which shows what percentage of emails were delivered to the inbox or junk/bulk folder; Content Analyzer which analyzes message content against 30 different spam filters; Blacklist Monitor checks to see if a sender's IP addresses are listed on any of 300 blacklists; and ISP Monitor provides real-time information about email delivery delays at more than 30 ISPs. EmailAdvisor is integrated into Lyris ListHosting, EmailLabs and Sparklist or is available as a stand-alone service. For more information visit <http://www.lyris.com/products/emailadvisor/>.

## About Lyris

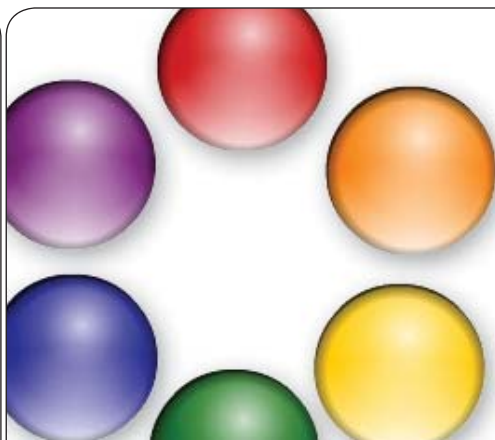
Founded in 1994, Lyris Technologies provides leading-edge email marketing software solutions to more than 5,000 customers worldwide. Our suite of products, led by our flagship product ListManager, offers powerful tools for opt-in email marketing, list management, database segmentation, and deliverability assurance. Lyris offers both hosted and software versions for publishing email campaigns, newsletters, and discussion groups. Our commitment to permission-based marketing, outstanding deliverability rates, and our extremely positive ISP relations make Lyris' solutions among the best-selling email marketing applications on the market today. Headquartered in Emeryville, California, Lyris is a subsidiary of the J.L. Halsey Corporation (OTCBB:JLHY), a leading provider of technology solutions to marketers at mid-size businesses. J.L. Halsey's other brands include ClickTracks, EmailLabs, Hot Banana, and Sparklist.

## Behind the Statistics

For the period beginning January 1, 2007 and ending March 31, 2007, the Lyris EmailAdvisor service monitored the full delivery trajectories of 440,694 production level, permission-based email marketing messages sent from 69 different businesses and non-profit organizations to multiple accounts at 54 ISP domains in the United States, Canada, Europe, and Australia.

Messages were chosen to represent a cross-section of typical email marketing and newsletter activities. Examples of email message types monitored by the study include publishing, business-to-business, retail, travel, finance, among many others. In all cases, the recipients to whom the emails were sent had made an explicit “opt-in” request to receive the messages at the specified email addresses.

It should be noted that in addition to ISP policies regarding the processing of inbound email, deliverability rates can be affected by a sender’s content, mailing history, data collection practices, use of sender authentication protocols, and other reputation factors. Senders who do not adhere to email marketing best practices may experience deliverability rates lower than those quoted in this report.



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