

Acquisition and the Consumer Mindset

2019

Campaign sponsor

PARAGON
Customer Communications

Customer Engagement

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/ Introduction

I read a really excellent book recently called *Heartfelt*. The principle is that a football fan of one Edinburgh team (Hibs) spends a season trying to convince himself to become a fan of another Edinburgh team (Hearts). At the end of the season, during which he makes some good friends, actually enjoys some of the football and sees his new team do better than his old team, he still can't bring himself to switch. It seems that switching your football colours is pretty hard to do.

As consumers, it feels like we are being encouraged to switch all the time. The government have made it easier to move our bank accounts or energy supplier, and recently the mobile providers have agreed to a text based easy switching programme. And yet, as we have seen from other Customer Engagement research, the actual incidence of switching isn't huge. In this report we take a deep dive into switching and what drives us to make the decision to move from one provider to another.

Over 60% of the people we spoke to have switched at least something in the last year. Sometimes that's a big decision like changing energy supplier. Others a bit less life altering, such as switching shampoo. The key area of our interest is what factors have influenced the switch. In general, consumers believe that they switch because of the attractiveness of a new provider rather than the lack of service from the existing supplier. Given the efforts made to make switching easier, you would think that the opposite would be true.

There is also some useful detail in terms of who people are switching to. In general, the big brands are losing out and new suppliers are winning. This isn't always true but does show that interrupters can have an impact even in established markets.

No single brand has interrupted as much as Amazon, in the report we look again at their ongoing impact on the UK market. From our survey, over three quarters of people claim to use Amazon every month rising to nearly 90% for people with children. It shows that access, service, price and ease of use really matters and even more so to those who are pressed for time.

In addition, the report also carries on some of the research we have looked at previously around favourite engagement channels for receiving information on new products and services. As with last time we ran the report, email comes out on top with post a bit behind. However, social media is having a growing influence particularly for younger age groups. It turns out that the time and effort in building social teams is worth it after all.

Scott Logie
Chair of the DMA Customer Engagement Committee
MD at REaD Group Insight

/ Foreword – Paragon

Gaining consumer attention in a crowded market has become more science than art in recent years. This report does not signal that the race for revenue and ongoing loyalty will get easier any time soon, or that there is a strategy which delivers a silver bullet. It does, however, provide some very thought-provoking insights into when consumers want to engage with brands and the channels they trust more than others.

The good news is that consumers continue to be open to trying new brands and services. For retail and FMCG especially, this is driven by positive outcomes rather than by poor experiences. Within a service-driven sector like banking, poor customer experience remains a strong motivation to switch, but the unprecedented rise of Monzo does indicate a shift in attitudes and an increased willingness to switch to access services more suited to an individual's needs.

When considering the best means of engagement, the data indicates that trust in the media promoting the brand is becoming increasingly important. The report does nothing to dampen the 'creepy or cool' debate surrounding search-driven marketing, which continues to polarise opinion (I'm definitely in the 'creepy' camp on that one!) Interestingly, the report does suggest a rise in podcast engagement as well as growth in the trust consumers have for brand messages via this channel, indicating the value exchange expectations of consumers is still rising.

Whichever channel and for whatever reason people want to switch, you still need to make your communications timely, relevant and motivating, creating consumer trust by offering them a genuine benefit. In this way, a customer's family, friends and other influencers will complement your own marketing efforts and brand reputation through organic referrals.

In a crowded 'always on' media landscape it's difficult to assess where to deploy your resources, but the sheer variety of channels ensures that you can now put the right message in front of the right person at exactly the right time.

Nick Barbeary
Client Development Director
Paragon Customer Communications

/ Executive Summary

- Email retains top spot as consumers' most preferred marketing channel, but social gains ground among younger audiences
- TV, online, and family remain influential sources in brand discovery
- Consumers look to a range of sources to help them to trust in marketing messages they receive (in particular friends & family and reviews), but when responding directly to marketing messages of interest, consumers are most likely to search online themselves for more information (49%)
- 61% of customers had switched at least one brand in the last 12 months; among the categories researched, consumers are most likely to switch energy supplier (26%) and shampoo brand (26%)
- Brands are successfully attracting people to switch, rather than bad customer experiences pushing them away; for example, 68% of supermarket switchers changed brand because they were attracted by their new provider
- In most categories the main reasons for switching, alongside 'Price', were to find 'Better value' and brands that 'Better meet needs'
- Over a third (37%) of supermarket switchers in the sample switched to a "discounter" brand, such as Aldi or Lidl
- Some consumers are serial switchers – likely to switch brand again in the next 12 months – and are most motivated to switch by 'Price', 'Value' and 'Promotions'
- 57% of consumers have bought from start-up companies, with 'Genuine-ness' seen as something people particularly look for – 31% select a brand being genuine as something that would encourage them to try as a start-up
- 37% of respondents listen to podcasts – in particular, they tend to be male, 16-24 years old with an annual income above 25k
- Over half (57%) of those listening at least once a week trust podcast advertising
- The majority of consumers (88%) with children under 18 use Amazon at least monthly – with the more people buy from Amazon, the more they are willing to buy in new areas or products that aren't yet available from the titan brand
- Current Amazon behaviour suggests users both discover brands direct through the brand (57%), but also compare these results to other brands (65%)
- Consumer interest in buying via subscription is driven mainly by 'Convenience' (52%) and 'Cost savings' (50%), but also by the want to 'Try new brands' (32%) – It is still early days for subscriptions taking over more areas of purchasing

/ Channels for Acquisition

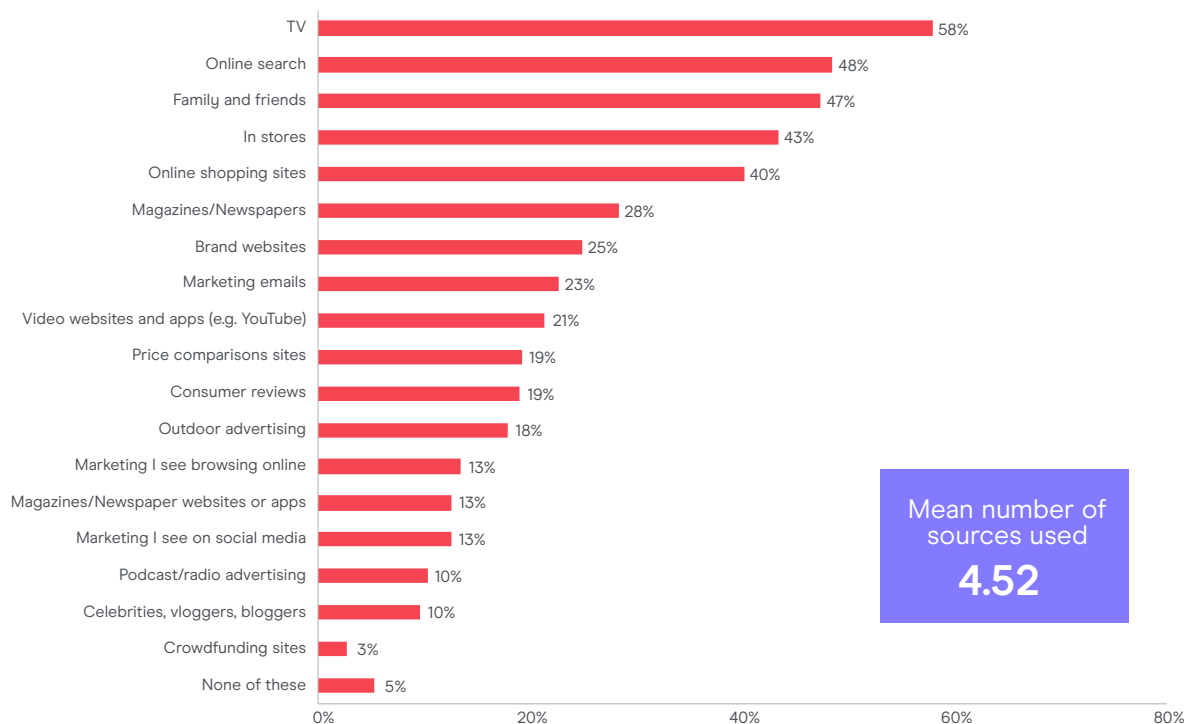
Email Remains Preferred, but Influence is Broad

Email remains one of the most trusted ways to contact customers, the channel where they deem marketing is most relevant and remains their preferred channel for receiving marketing messages.



However, when asked which sources help them to discover new products and services it is clear that a range of both digital and non-digital sources are influential in engaging consumers. TV tops the list of influences (58%), followed by online search (48%) and family and friends (47%).

How do you typically find out about new products and services?



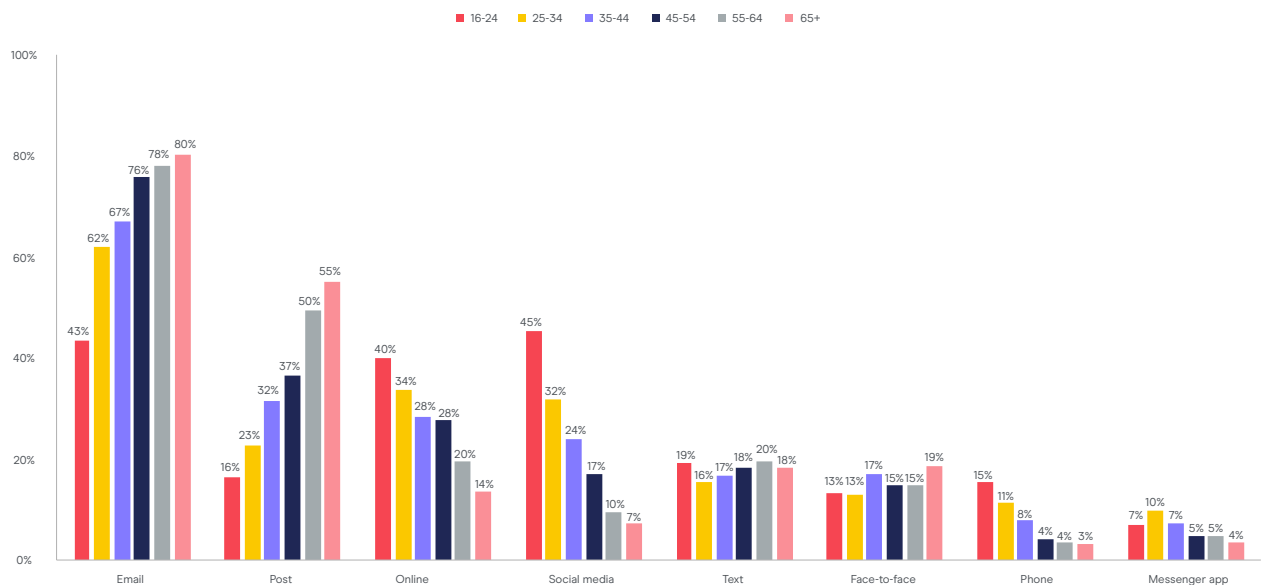
Social Gains Ground

While the mix of marketing influences is true across generations there are notable differences. Younger generations are more likely to use digital sources and engage with online and social marketing.

Over half (59%) of 16-24s agree that the adverts they see on social media are more interesting than elsewhere (vs. 30% for all respondents) and 60% of millennials claim they have discovered new brands through social media (vs. 41% overall).

In fact, 16-24s are more likely to rank 'Social media' as their preferred channel to receive marketing messages than any other channel. In contrast, 'Post' resonates much more with older generations.

What way do you prefer to receive marketing messages? (Ranked in in top 2)



Key takeaway

Marketers need to stay attuned to the multiple influences and potential acquisition routes impacting consumers and build awareness across channels. Social is growing in influence as a primary channel for younger consumers, but there are still a range of digital and non-digital touchpoints available to engage younger consumers.

Building Trust

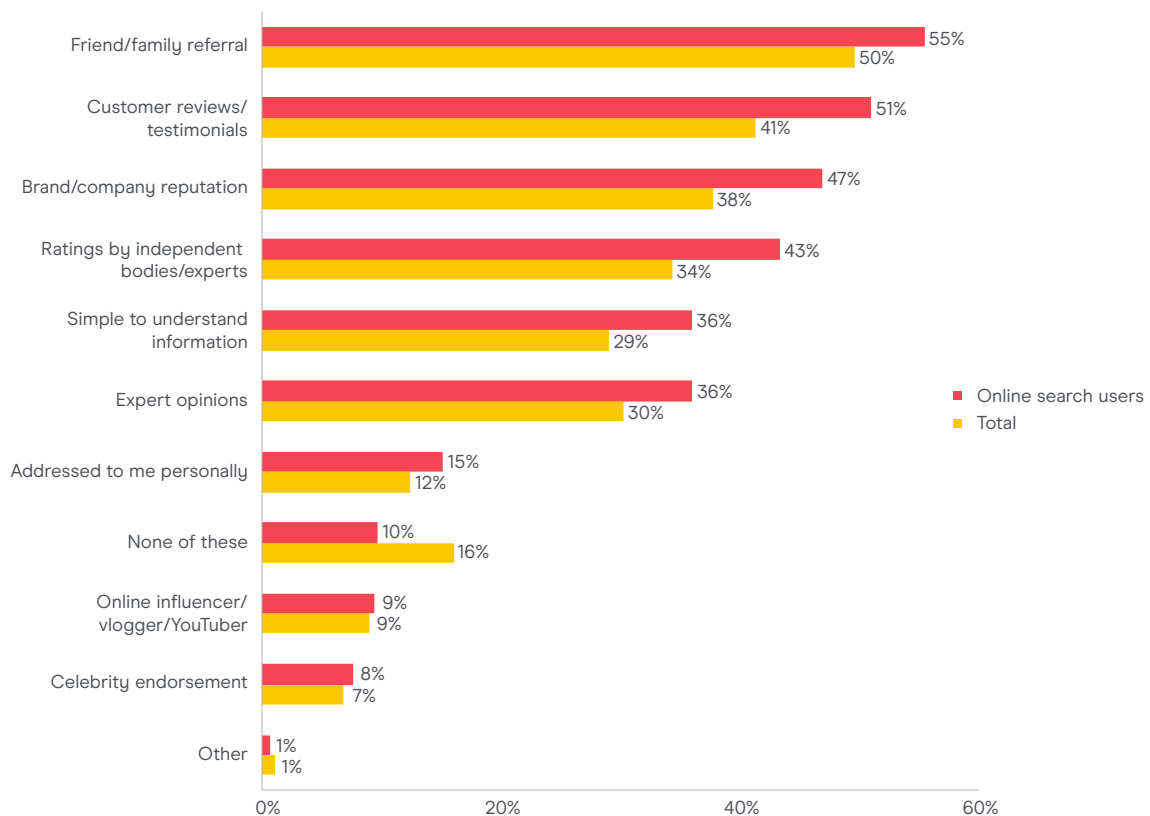
When ranking how much they trust the marketing messages they see, less than half of consumers rated this on the higher end of the scale (5-7 out of 7) regardless of the channel.

Given their muted general levels of trust, consumers look to a variety of external sources to gain trust in marketing messages from brands they haven't used before.

'Friends and family' and 'Customer testimonials' are the most commonly used, followed by 'Brand reputation' and 'Independent expertise'. Few consumers indicate that 'Influencer endorsements' impact their ability to trust in marketing, though this does rise to 23% among 16-24-year-olds.

It is interesting to note that users of 'Online search' are more likely to agree that extra assurances will help them to build trust. While consumers are happy to discover brands online, they also seek further verification that what they find online is worth trusting. Even when we asked what consumers are most likely to do when responding directly to a marketing message of interest, consumers are most likely to search online themselves (49%) preferring to take their own route to discover more about new brands.

Which of the following would help you to trust marketing messages you receive from brands/companies you have not used before?



Key takeaway

Ensure marketing is supplemented with supporting material and testimonies that consumers commonly seek to verify trustworthiness, including family and friend referrals and customer reviews.

Ensure visibility and continuity of campaigns across online search results and direct communications to ensure consumers can trust in the marketing they directly receive and information they seek themselves through search.

/ Understanding Acquisition: Switching Motivations

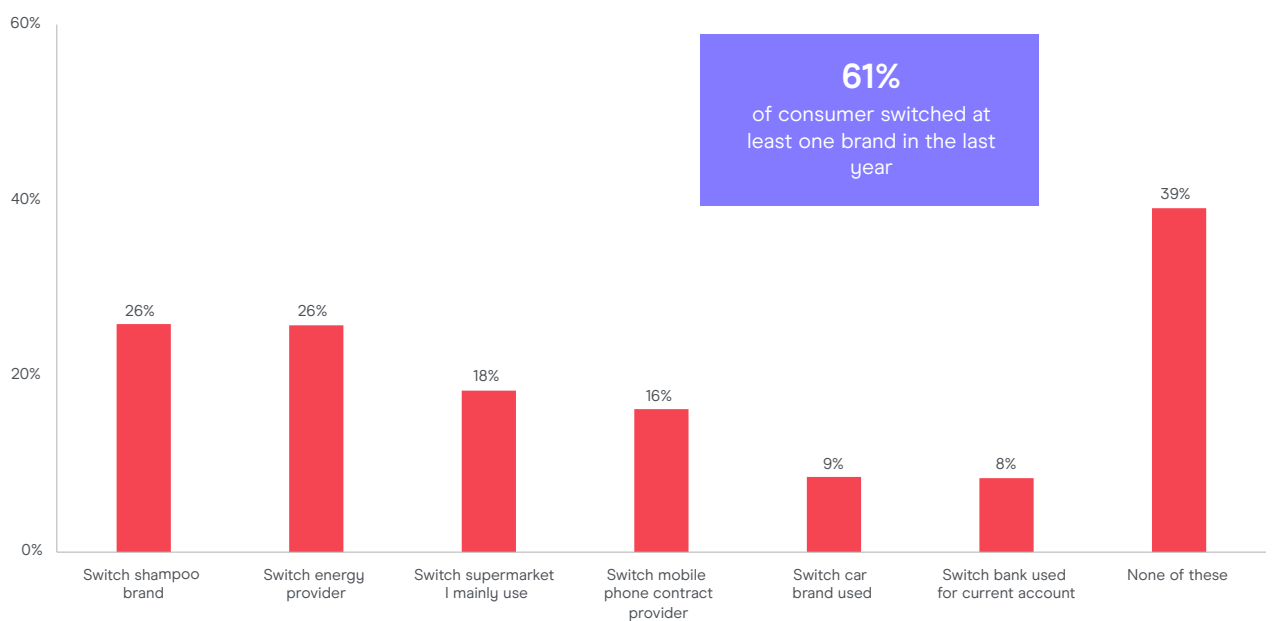
For marketers, acquiring new customers can require luring people away from their obligatory suppliers and brands. And for the consumer, switching has never been easier. Choice continues to expand, but comparison and recommendation tools help consumers to navigate offers, and new regulations and industry changes have simplified switching processes.

With the invitation to switch brands always just around the corner, we set out to better understand the consumer mindset when switching. What are consumers switching, what drives them to do so and how can brands best engage with the switcher mindset to gain – and retain – customers?

What are People Switching?

Across the brand categories we asked about, 61% of consumers had made at least one brand switch in the last 12 months. Consumers were more likely to have switched shampoo brand and energy supplier, and less likely to have switched their car or the bank they use for their current account.

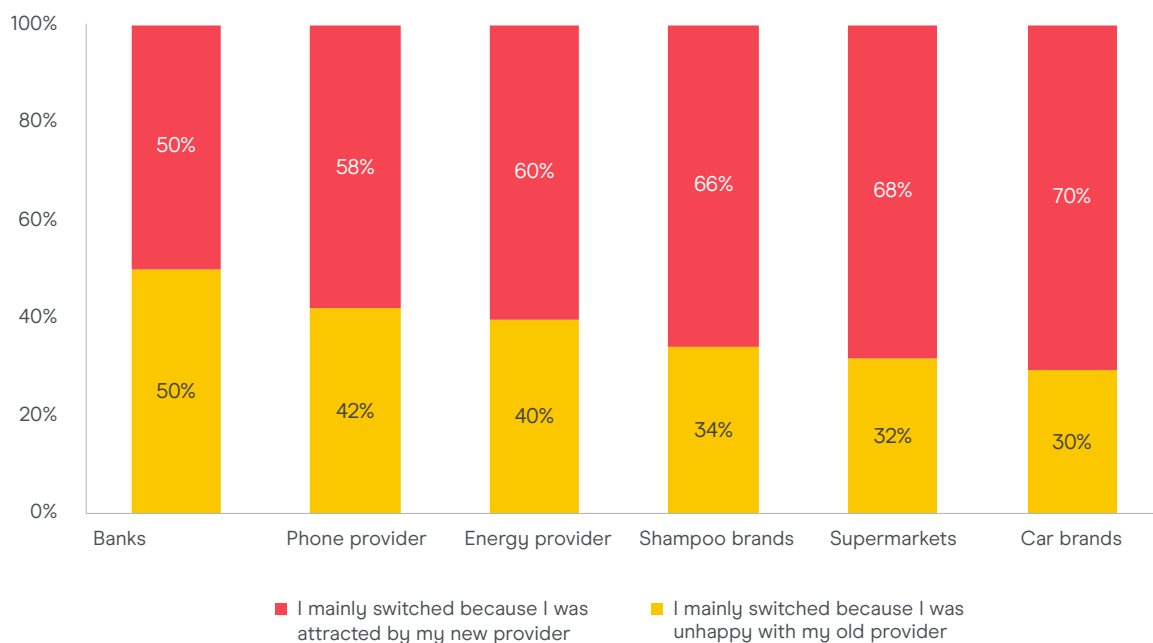
Which of the following have you done over the last 12 months?



Brands Attract

Interestingly, consumers in all categories apart from current account were more likely to feel that their switch was due to being attracted by their new supplier rather than being pushed to move by bad service from their previous supplier. Brands are enticing consumers into new relationships.

Which of these best describes your reasons for switching TO the following brands/ companies?



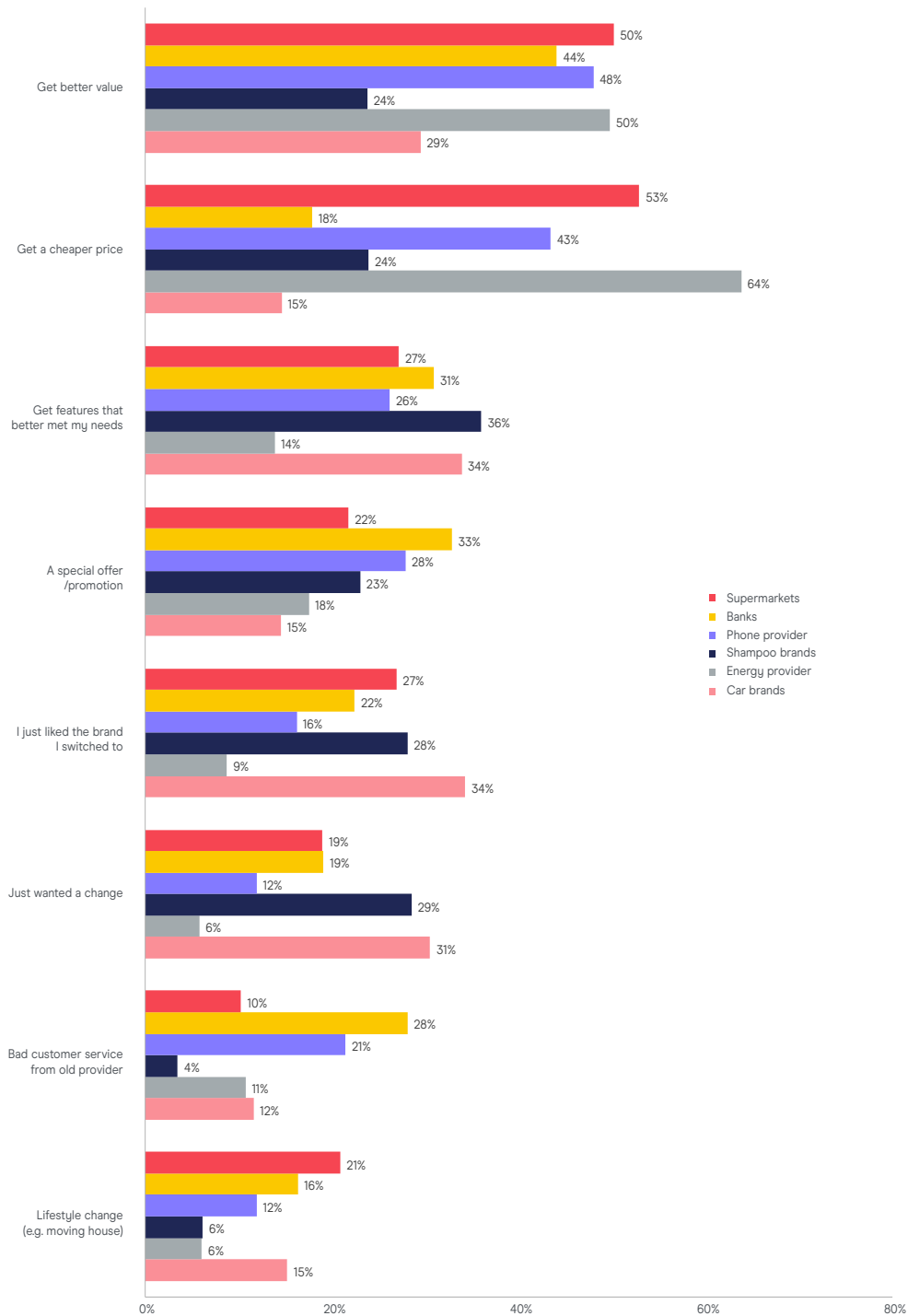
Switching For Value

Delving into more detailed reasons for switching, often the most important drivers for switching were to find better value, and to find a brand that better met their needs.

Rather than being attracted purely by offers or promotions, switchers are looking for a more rounded sense of value for money and for brands to genuinely match their individual needs.

Price drives energy, supermarket and mobile service provider switches the most. For banks and mobile service provider's switchers, 28% and 21% of switchers selected bad customer service as a driver for their move.

Which of the following were reasons why you switched TO the following brands/ companies?



Key takeaway

To acquire consumers in the switching mindset, deals will get attention but fundamentally ensuring your brand meets consumers' evolving core needs and desire for overall value are key to attracting new custom.

/ Understanding Acquisition: Brand Insights

Which Brands are Attracting Customers?

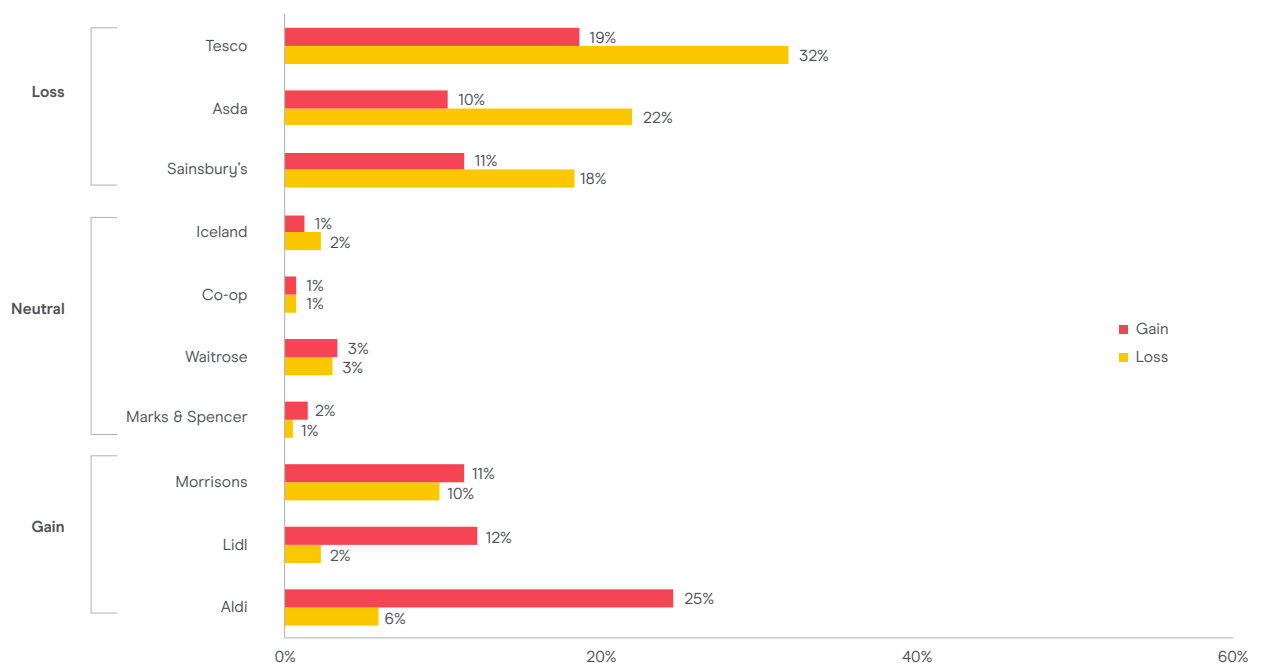
To understand where brands have made gains and losses among consumers who are moving their custom around. This analysis only reflects the sample of people who have switched within the category in the last 12 months, but we then categorised brands into the following groups:

- Gains: Where more switchers have switched to a brand than moved away
- Neutral: Where similar numbers of switchers have moved to and from a brand
- Losses: Where more switchers have left a brand than moved to it

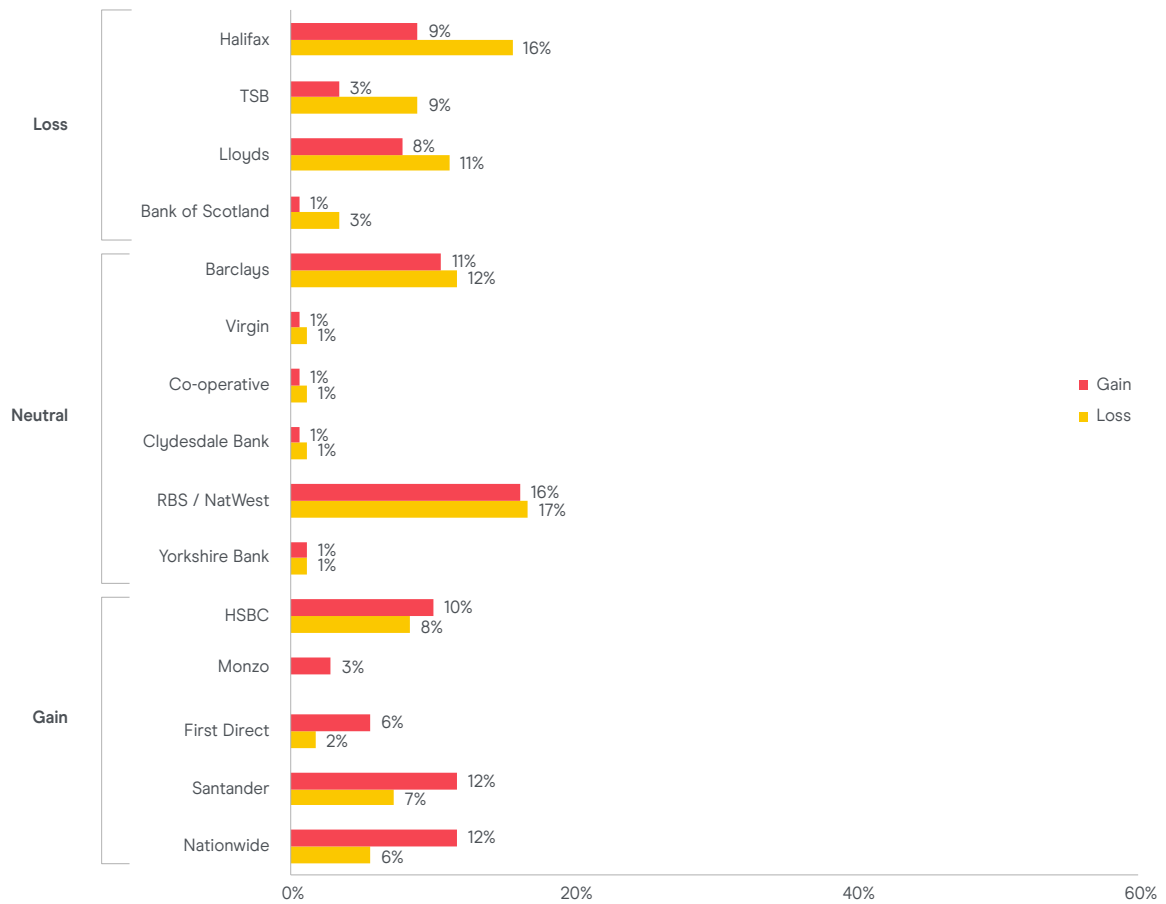
In the categories explored, there is an indication that newer entrants are disrupting and attracting new customers. Some highlights include 3% of switchers moving to Monzo, 25% of supermarket switchers moving to Aldi and 7% and 8% of mobile service provider switchers moving to Sky Mobile and GiffGaff.

If considering what these numbers reflect in term of the total the British adult population this could equate to approximately 2,356,000 people switching to Aldi, 149,000 switching to Monzo and 744,000 switching to Sky Mobile.

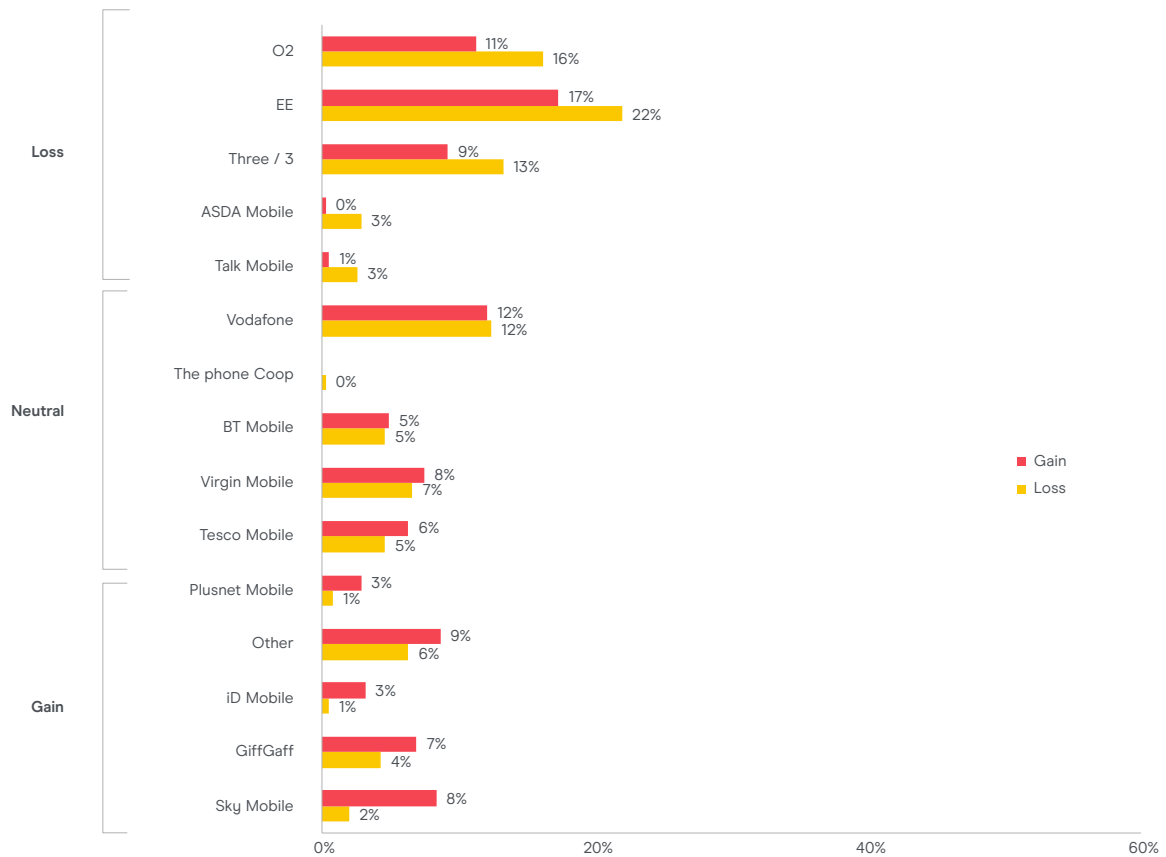
Which supermarket did you switch from and which did you switch to? (Among people who switched supermarket in the last 12 months)



Which bank did you switch from and which did you switch to? (Among people who switched bank used for current account in the last 12 months)



Which mobile provider did you switch from and which did you switch to? (Among people who switched mobile provider in the last 12 months)



Some clear patterns emerge within the supermarkets, banking and mobile service provider categories regarding which brands are particularly attracting consumers or losing them.

Of all the people who switched supermarket, more people were switching from a “Big Four” brand (82%) than switching to one (52%)

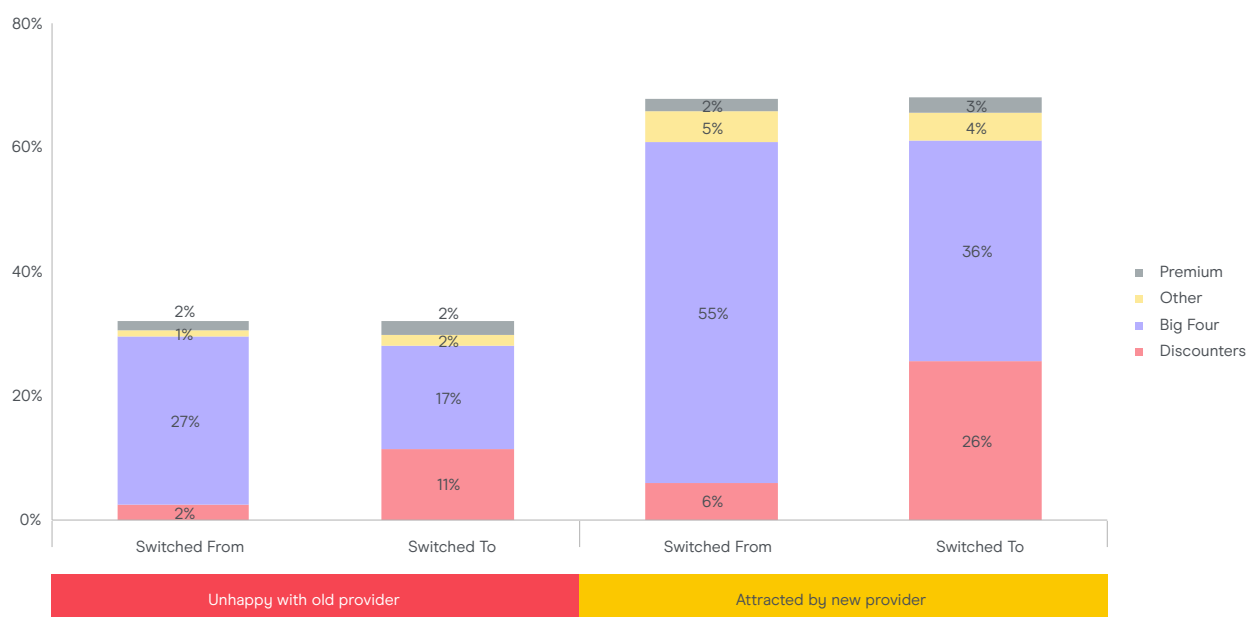
Of people who switched supermarket, 26% switched to a discounter brand and said that they switched because they were attracted by their new provider. 55% switched from a “Big Four” supermarket because they were attracted by a new brand.

27% switched from a “Big Four” supermarket because they were unhappy with the brand and 11% switched to a discounter because they were unhappy with their old supermarket.

The overall increase in custom for discounter supermarkets appears to be a result of both the appeal of the discounters and dissatisfaction with brands such as the “Big Four”.

However, most customers who switched to a “Big Four” supermarket switched because they were attracted by the brand – the majority of supermarket brand switching results from the pull of the new brand’s offerings.

Which of these best describes your reasons for switching from/to the following brands/companies? (Among those who have switched supermarket in the last 12 months)



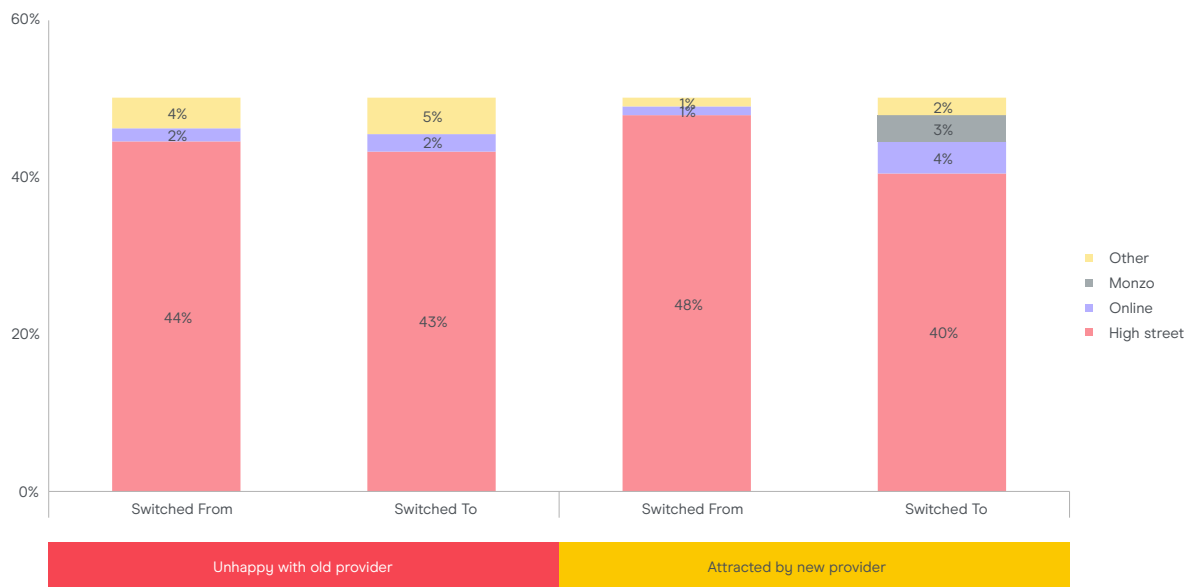
Switching bank account is relatively uncommon, just 8% of our sample had done so in the last year.

Despite most consumers unlikely to regularly switch bank account, overall, half of bank account switchers said their main reason was unhappiness with their old provider suggesting that customer service dissatisfaction is a stronger driver of switching within the sector.

Among all those who switched bank account, a lower proportion (84%) switched to a high street bank than switched from one (92%). Among bank switchers, 44% switched to a high street bank because they were unhappy.

Despite dissatisfaction driving switches in the sector, high street brands are still attracting customers, 40% of switchers to a high street brand were attracted by their new bank. However, 10% opted for online banks, start-ups or other smaller bank brands. Highlighting how new entrants are beginning to see success in offering more to draw new customers away from established high street brands.

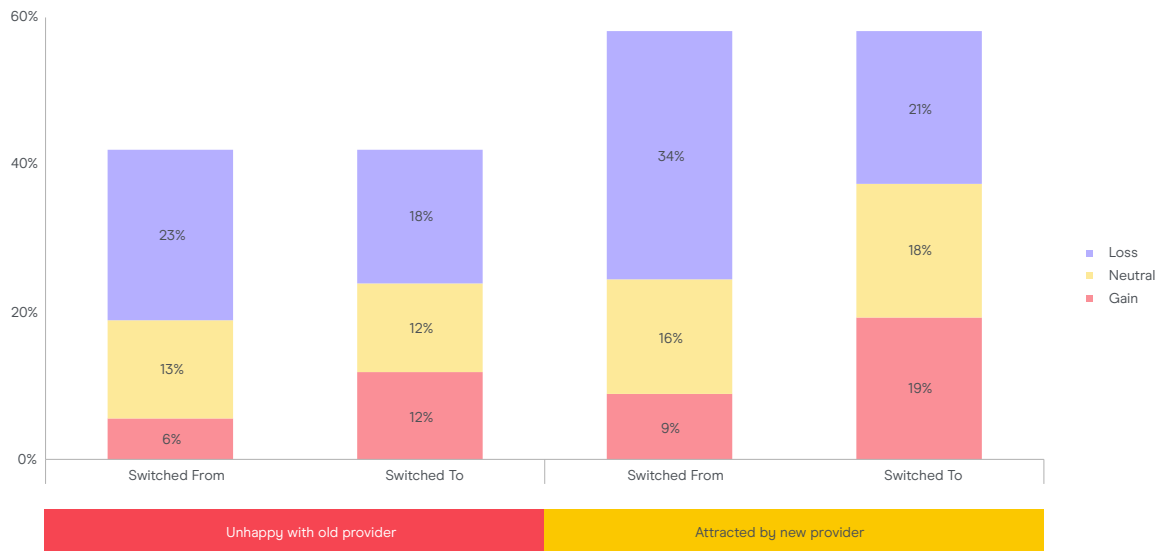
Which these best describes your reasons for switching from/to the following brands/companies? (Among those who have switched bank used for current account in the last 12 months)



'Mobile Service Provider Companies' who are losing more customers than gaining within our sample mainly see customers leaving because they are unhappy with their current provider.

Among those switching, 23% were switching from a "loss" brand because they were unhappy. Among those switching, 19% were switching to a "gain" brand because they were attracted.

Which of these best describes your reasons for switching from/to the following brands/companies? (Among those who have switched mobile phone provider in the last 12 months)



Key takeaway

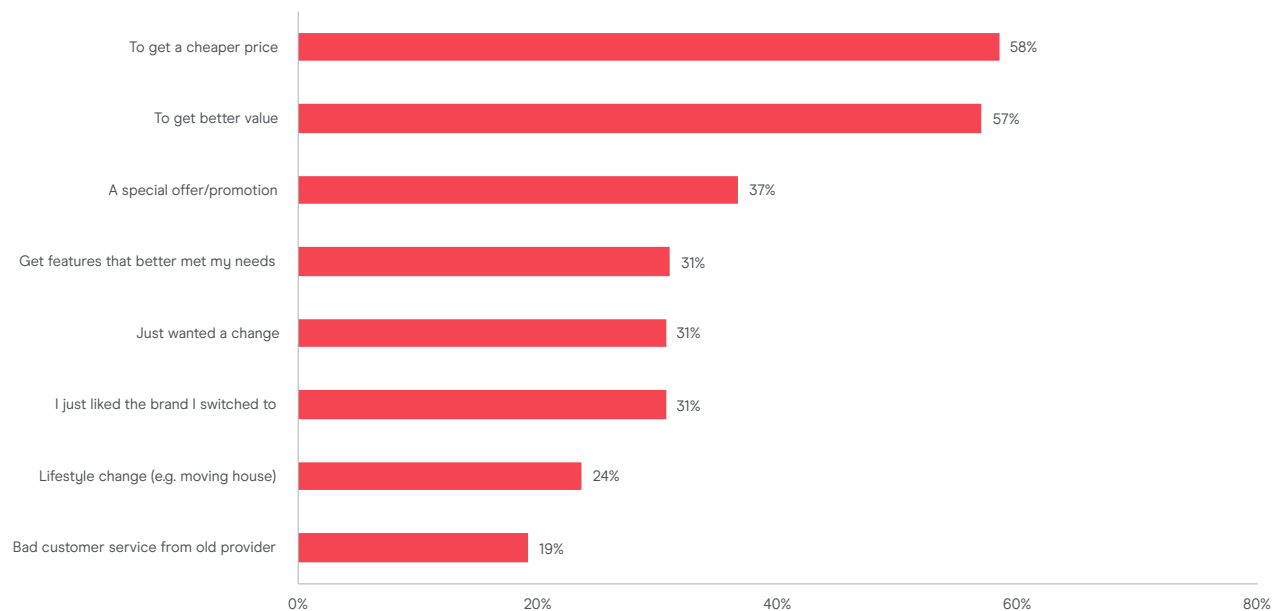
With disruptive brands entering markets, there is more to attract and engage consumers to make a switch. Is it time brands re-focus on engaging their existing customers and show they value their loyalty and not just on attracting new customers?

Serial Switchers

Are switchers already thinking about their next switch? What can we learn about the motivations of “serial switchers” – people who have switched and are planning to again?

For people who have switched in the last 12 months and are confident they will switch again for at least one product, their motivations for switching were more likely to be about ‘Price’, ‘Value’ and ‘Promotions’ – suggesting this group will focus first on competitive deals and are likely to be less passively loyal.

And which of the following were reasons why you switched to the following brands/
companies? (Among 'Serial Switchers')



Key takeaway

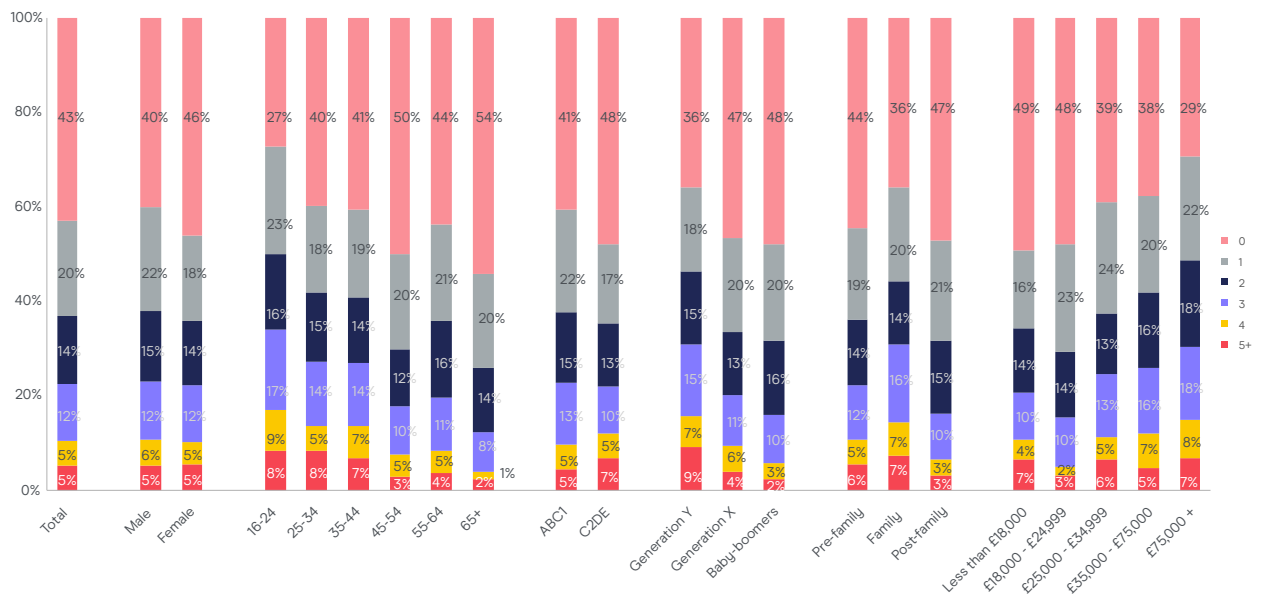
These findings underline that keeping existing customers and especially long-standing customers happy is worthwhile – new customers who are attracted by special deals may be harder to keep if they already have their eyes on their next special offer or promotion.

/ Understanding Acquisition: Trying New Brands

While the acquisition of customers who are in a switching mindset need to attract consumers within the context of them moving away from an existing brand, broader acquisition needs to engage consumers with the new in general. What attracts consumers to take a risk on a new brand? Is there a difference in what encourages consumers to try a new brand for the first time and to try brand new, start-up brands?

It seems many consumers are open to trying new brands; 57% of consumers have bought from start-up companies (across the categories we asked about). Younger consumers, those with children under 18, and those from higher-income households are more likely to have bought from start-up brands across more product/service categories.

Which kinds of products/services have you bought from a newly established or start-up brand /company? (Number of start-up categories bought from)



What Drives People to Try New Brands?

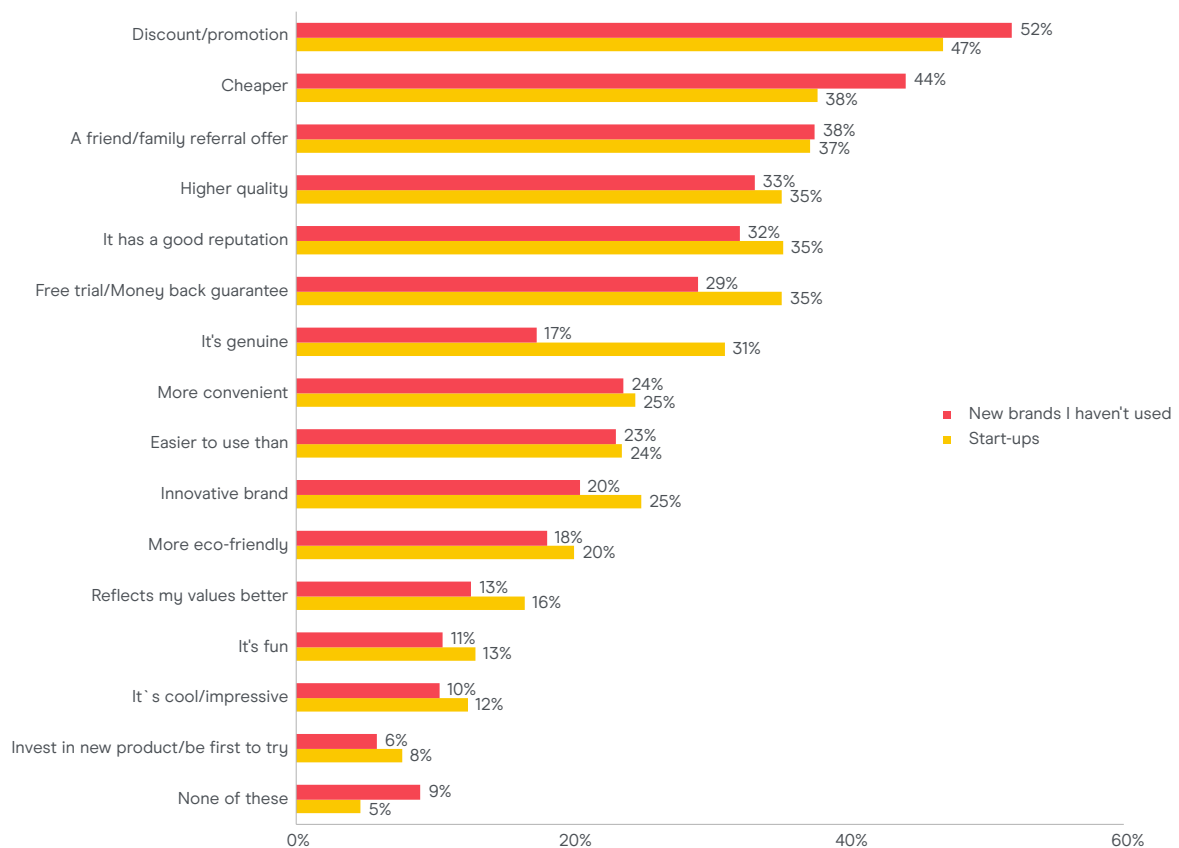
When asked what encourages consumers to try a brand for the first time or to try a start-up or new brand, a discount or price saving are unsurprisingly the most attractive incentives.

But there are also some significant differences in what drives engagement with start-ups vs. brands people haven't used before.

Consumers see a genuine brand feel as more important in encouraging them to try a start-up vs. a brand they haven't tried in general (31% vs 17%), and innovativeness (25% vs 20%) along with more emotional drivers such as reflecting a consumer's values (17% vs 13%) are also more important.

Also, a free trial or money-back guarantee is even more attractive an incentive to try a start-up (35% vs 29%); with a new reputation or new product, consumers may see this as a risk-minimising incentive.

And thinking about when you are buying products or services, which of the following have encouraged you to try new brands or companies you haven't used before? / Thinking about when you are buying products or services, which of the following would encourage you to try a newly established or start-up brand?



/ New Channels for Acquisition

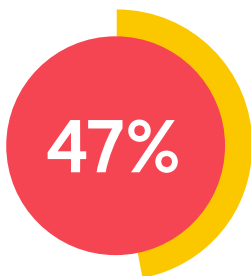
Podcasts: A Case for Caring About Context

Podcasts are a growing media channel. According to Ofcom's research, the number of weekly podcast listeners has grown from 3.2 million in 2013 to 5.9m in 2018 representing an increase from 7% to 11% of adults in the UK.

Podcast listeners span across demographics. Considering those who listen to podcasts at least monthly, a majority are either Millennials, consumers with a household income over 75K or have children under 18. Specifically, the most engaged podcast audience are consumers aged 16-34 with a household income above £25K – who are most likely to be regular podcast listeners, with 14% of this group listening daily and 29% listening several times a week.

Our research suggests that podcasts listeners engage significantly with the advertising they hear through podcasts too.

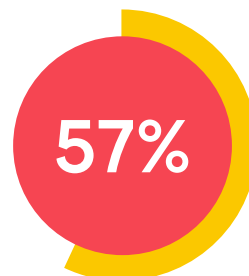
Discovered new brands through
podcast ads



Believe podcast marketing
is relevant



Trust podcast marketing



Why are podcasts able to create such strong engagement among users?

Podcasts advertising offers marketers the ability to place ads alongside a specific theme and interest-based content. And, of course, this means marketers can use the context of podcast content. Marketers can match their advertising to a relevant audience engaged in a topic that aligns with their brand or product offer.

Coupled with the familiar voice delivery of podcasts ads – often delivered by podcasts hosts themselves – and transparency that such adverts can help to support the podcasts' existence build a strong case for why podcasts advertising feels so relevant and is well trusted among consumers.

Key takeaway

Exploring the podcast landscape to find a contextual match for your brand could help to build closer engagement with key target audiences.

Amazon Rising

The DMA's previous 'Customer Engagement: How to Win Trust and Loyalty' research has highlighted the dominance of Amazon among UK shopper's preferences. In 2018's research, Amazon was the brand most likely to be the brand consumers' named – unprompted – their favourite. In fact, marketers themselves rated the online titan brand as leading the way in customer engagement campaigns and strategies in our 'Customer Engagement: Marketers' view' report too.

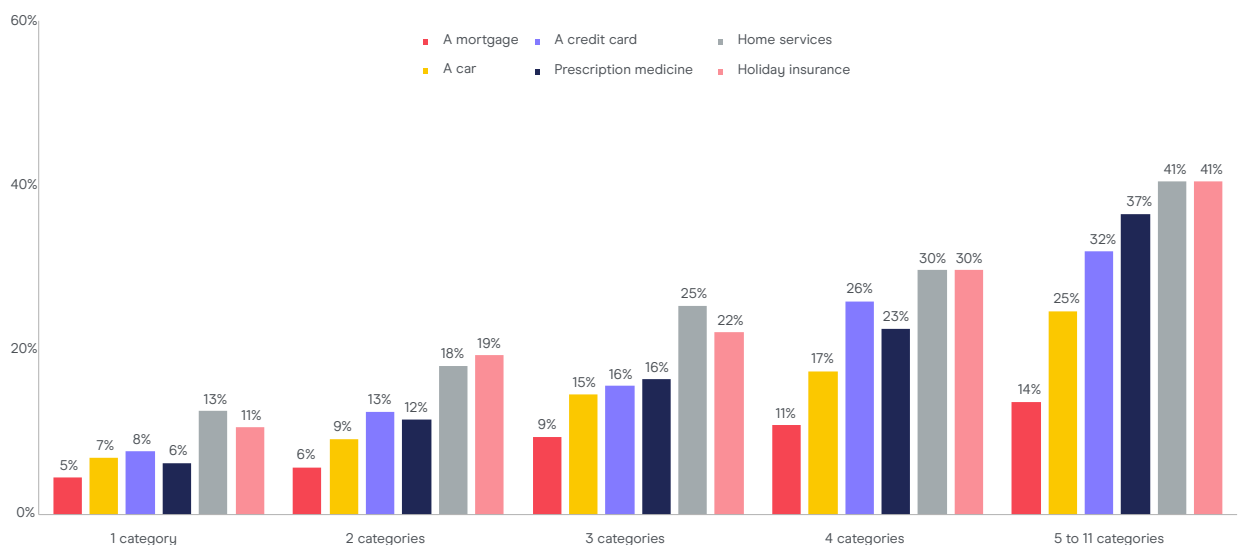
In 2019, three quarters of consumers claim to use Amazon at least monthly, rising to 88% of those with children under 18. Increasingly, the brand is becoming one of the main ways consumers filter the masses of choice available to them.

To understand more about consumers' engagement with Amazon and what potential the online retailer has to become a one-stop-shop discovery channel for all consumers' needs we asked consumers which categories they currently buy from using Amazon, and which they would be willing to buy from Amazon if they could.

It is clear that the more categories consumers currently buy from Amazon the more likely they are to want to extend their buying into other categories. In other words, the more consumers are currently discovering brands via Amazon the more they are happy to use it as their primary seller for more of their buying needs.

As Amazon continues to expand its services in new categories, it is likely that consumers' previous buying experience with Amazon will significantly help them gain new custom.

If you could buy the following from Amazon, which of the following would you consider buying? (By current usage – current number of categories people buy products from via Amazon)

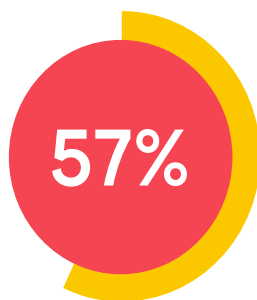


While the dominance of Amazon cannot be denied, our research shows that consumers do still consider other brands when searching for products and ultimately want to retain some control over their brand choices. Over half (57%) of Amazon users tend to use the site first when they need to buy something; brands need to have a presence on this channel to be discovered first.

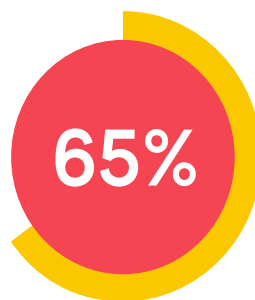
However, 65% of Amazon users agree that they always compare prices of products they find on Amazon with other sites. Price-conscious consumers will still explore outside of Amazon to get a good deal but when convenience and time pressure kicks in the Amazon shortcut wins over.

Attitudes towards Amazon among Amazon users

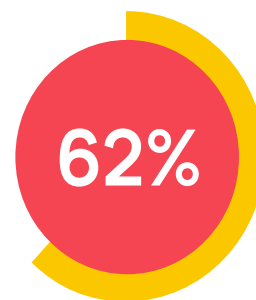
Agree "When I need to buy something, I tend to search on Amazon first"



Have discovered new brands they like by shopping on Amazon



Always compare prices of products they find on Amazon vs. other sites/shops



Key takeaway

Visibility on Amazon is increasingly becoming an essential part of acquisition strategies. However, maximising your brand presence across channels even as discovery is narrowed via Amazon platforms will ensure your brand is considered across consumers' decision-making process.

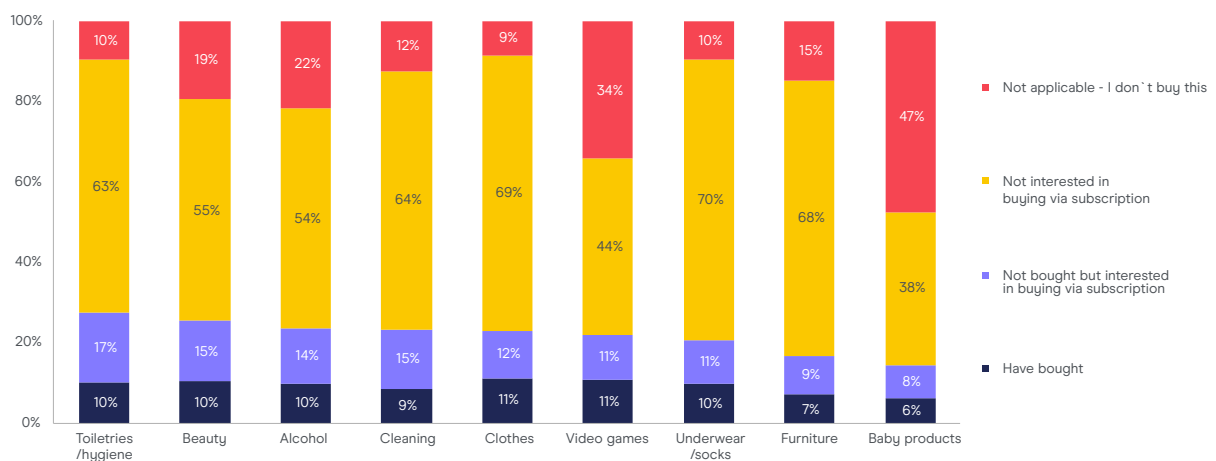
Subscriptions and Loyalty

In recent years, subscription use has grown. From media-based subscriptions – such as Netflix, Spotify and Amazon Prime – to product-based subscriptions for FMCG products, subscriptions are evolving as a new model of consumption across categories. This holds the promise for brands of an acquisition strategy that also builds in strong potential for a longer commitment from consumers. Subscriptions have also offered consumers a new way to discover new brands.

To understand the potential of subscriptions we asked which subscriptions consumers already own, and which categories of products they have bought using a subscription. Media subscriptions are the most common with 47% owning a TV or film streaming subscription. Millennials and those with children under 18 or in 75k+ households are the most likely to own a higher number of subscriptions – 56% and 54% own 2 or more out of the 5 we asked about.

Despite the potential subscription-based buying has to transform how we consume many products, subscriptions for products are reaching relatively few consumers so far. Less than 12% of consumers have bought each of the products we asked about via a subscription. When also considering those interested, the categories with the most potential are toiletries and beauty products – over a quarter of consumers are interested or have bought such products via subscription.

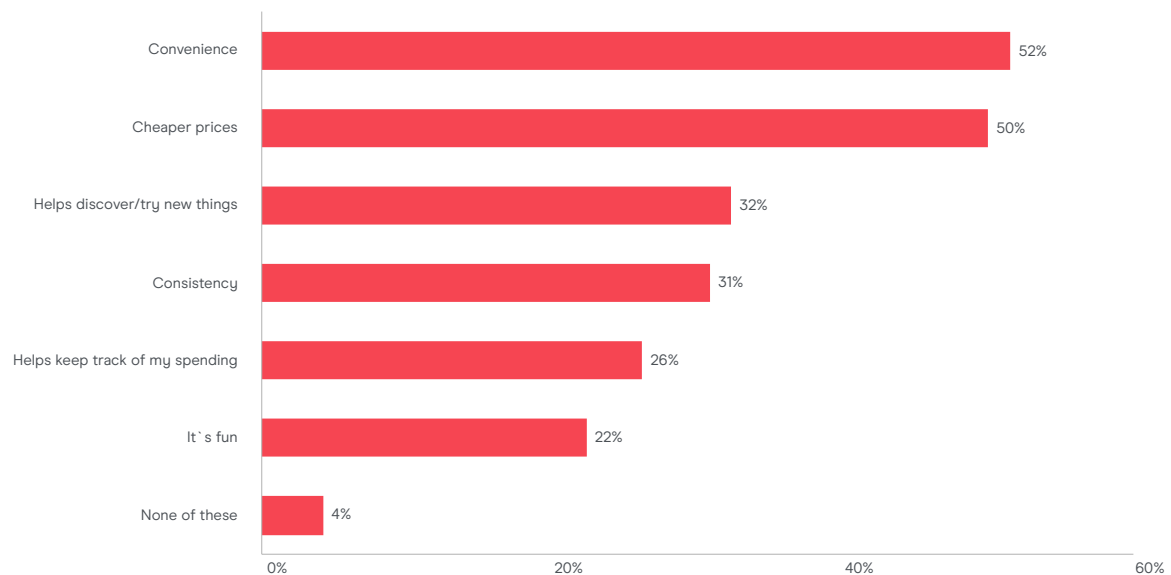
Which of the following products have you bought via a subscription or would be interested in buying via a subscription?



Among those who have bought products using subscriptions or are interested in doing so, the main reasons they give for their interest is for convenience (52%) and to get better prices (50%). This suggests that frequent purchase product types may be better suited to subscriptions models where brands can capitalise on the consumer desire not to run out of their everyday essentials and get their favourite products conveniently replenished.

However, 32% also indicate that subscriptions help them to discover new brands underpinning that there is potential for subscriptions to act as an acquisition channel. Like Amazon, subscriptions can act as a shortcut for consumers who want to streamline their decision-making and avoid choice overwhelm.

You said you have bought products / were interested in buying products via a subscription. Which of the following are reasons why you like buying/are interested in buying products in this way?



Key takeaway

Subscriptions appeal to consumers looking for convenience. Emphasise the time-saving benefits of subscription-based buying and look for opportunities to become a decision-maker on behalf of consumers, easing the process of choosing new brands by automating discovery for them.

/ Methodology

In July 2019, Foresight Factory conducted, on behalf of the DMA, a 20-minute online survey of 2,011 GB respondents aged 16+. Survey respondents were accessed using Dynata panel services. Unless referenced, all data included in this report is taken from this survey. For this research, Foresight Factory set interlocking nationally representative quotas on age, gender and region. This ensured the sample was representative of the GB population. Weighting was also applied to further ensure a nationally representative sample. The analysis of the data was conducted in-house by Foresight Factory's quantitative analysis team.

/ About our Partner

Customer Engagement Partner



Paragon Customer Communications offer a complete communications solution. We work diligently to connect our clients with their customers across every channel.

This is achieved through expertise, technical solutions and extensive, multi-channel delivery capabilities. We develop these areas and future-proof our solutions to ensure our proposition is aligned to our clients' ambitions.

Our solutions support all stages of the customer communications journey, whether our clients need data-driven customer engagement, multichannel marketing, transactional communications, or automated inbound communication workflows. We are behind the scenes helping clients to transform how they operate, digitising their customer journeys and experiences.

PCC has significant scale in the UK, France, Germany, Benelux and Eastern Europe, plus an international supply chain supported by the broader Paragon Group structure. Operating across all major sectors, we have long-lasting relationships with exceptional clients built on total delivery and complete security. Compliance and regulation are of the utmost importance to us and our clients. In this regard PCC are ahead of the curve, working constantly to develop stronger processes, adopting new standards and managing these regulatory demands across all channels and sectors.

We enable our clients' customer communications to have the biggest possible impact.

/ About the Campaign

We put the customer at the heart of everything we do – especially when it comes to our [Customer Engagement](#) campaign.

This campaign uses research and insight to help you maximise your engagement for the benefit of marketers and consumers alike.

If you build a rapport with your customers, and you have something they want, then they will buy from you again and again.

We want to know what builds this rapport. We know creativity, data and technology are factors, but we don't know how the interplay works.

This campaign aims to discover what makes brilliant engagement.

Check out our popular [Marketer Email Tracker](#) and [Consumer Email Tracker](#), and explore our engaging infographics which are breaking down key ideas.

We also run events to encourage better Customer Engagement. Keep an eye on your emails, or visit our [events page](#) to book your spot.

Tap into DMA research, insights, thought leadership, and networking events on offer by visiting the DMA online and discover how you can get involved with and get the most out of our [Customer Engagement](#) campaign.

Better engagement means better business.

/ About the DMA

The Data & Marketing Association (DMA) comprises the DMA, Institute of Data & Marketing (IDM) and DMA Talent.

We seek to guide and inspire industry leaders; to advance careers; and to nurture the next generation of aspiring marketers.

We champion the way things should be done, through a rich fusion of technology, diverse talent, creativity, insight – underpinned by our customer-focused principles.

We set the standards marketers must meet in order to thrive, representing over 1,000 members drawn from the UK's data and marketing landscape.

By working responsibly, sustainably and creatively, together we will drive the data and marketing industry forward to meet the needs of people today and tomorrow.

www.dma.org.uk

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