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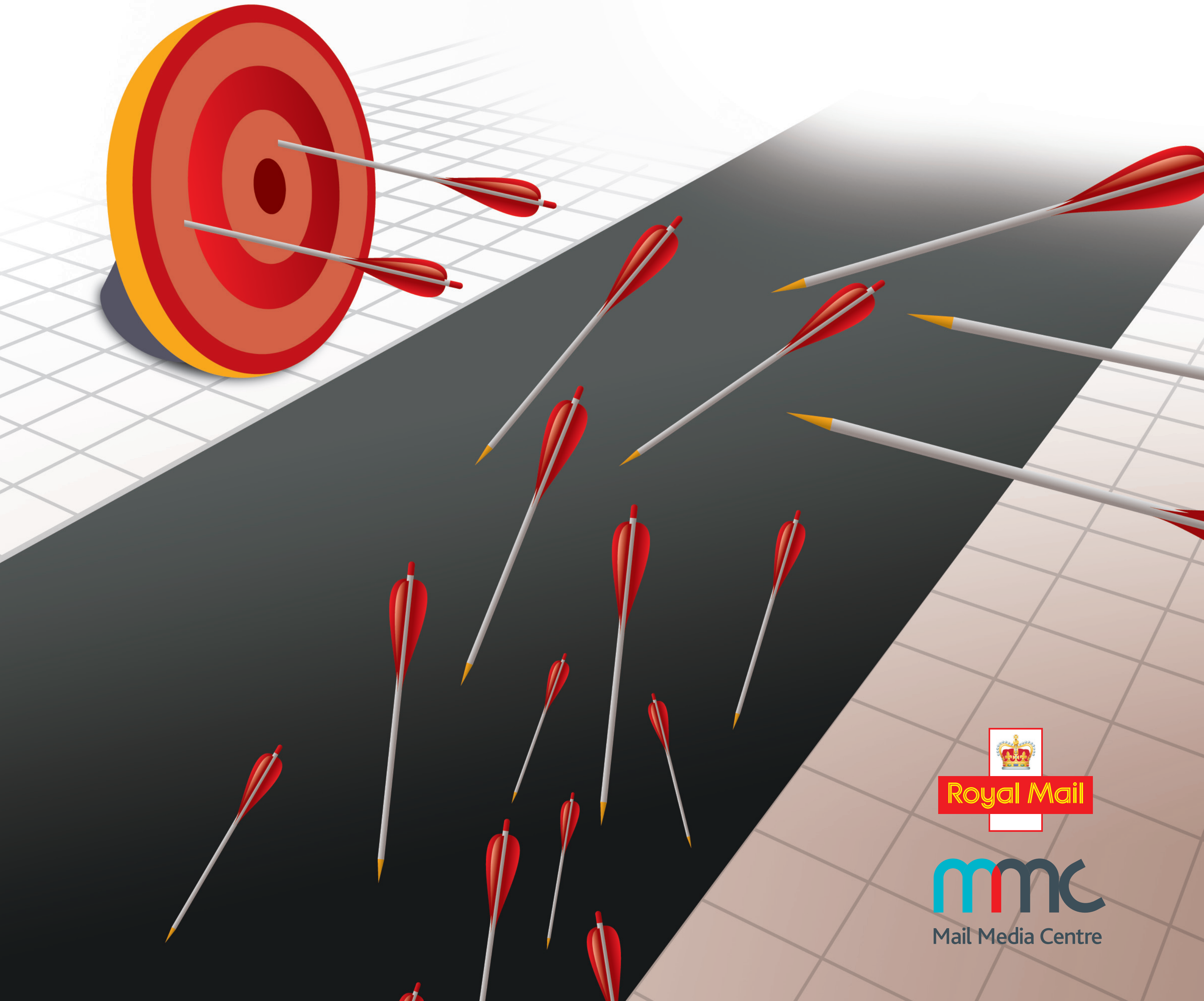
fast.MAP
Effective Marketing Insight

fast.MAP MARKETING GAP

The Inside Track on Consumer Behaviour



Royal Mail

mmc
Mail Media Centre

Contents

Filling the Marketing-GAP: An introduction from the IPM

In the IPM's last white paper, we used as the theme the Donald Rumsfeld "There are known knowns; there are things we know we know. We also know there are known unknowns; that is to say we know there are some things we do not know. But there are also unknown unknowns – the ones we don't know we don't know."

However, within that seemingly all-encompassing set of options one is missing.

Things we think we know, but we may be wrong
This report lays down facts in key areas as a basis for further research in later white papers, delivering insights for members and the community. As well as delivering a major stake in the ground for the promotions industry in the leading marketing benchmark in the UK - the *fast.*MAP/ IPM Marketing-GAP Tracking Study - the IPM partnership with *fast*.MAP brings with it much-needed long-term information on the current position in key areas, as well as the promise of tracking change as it happens.

Insight is defined as "a penetrating and often sudden understanding, as of a complex situation or problem" (Collins English Dictionary). The basis to being able to develop accurate insight rapidly has to be the constant availability of up-to-date knowledge. Sudden understanding in Promotions Marketing rarely has time to develop, since the planning timescales tend to be short. The IPM is now prepared to deliver regular updates in key areas.

In the two years since the establishment of Insights as a new Department within the IPM, we have laid down a basis for developing an understanding of promotions. Necessarily, this does spread into many allied marketing disciplines, since promotion techniques are applied very broadly. Currently, a competition is leading the media line for Cadbury, collectables are driving the sales of newspapers and within this report consumers say that a prominent reason for opening a mail shot is because they expect to find a promotion or a sample within.

Over a third of them also agree that they actively search for money-off vouchers or special offers in their post and liked advertising mail from companies that rewarded customer loyalty.

It is very important not to underestimate the strength of promotions in every area of commerce, business-to-business as well as business-to-consumer. Companies need to achieve the correct combination of incentive and message to turn the incentive into long-term action.

In this report consumers reveal that promotions and discounts have become very important to them. Since a typical promotion costs a company significantly less than a typical price discount, if there were ever a time for promotions to "come of age" then this is that time.

Using promotions is "simply" a matter of defining the most appropriate promotion or incentive for the target market and identifying the best media and creative combination to reach them. Media choices include DM techniques such as mail, email, telephone, face-to-face, on-pack, POP, posters, TV, press and doorstep.

Success lies in defining your target and then selecting and implementing the best combination of techniques to reach it. Success also lies in realising that in the view of many commentators, mixed media is better than solus. The IPA recommends three if you want to reach the heights of its award winners. It is also striking the variety that the IPM Award winners use.

Perhaps in the past it was possible to rely on experience as a guide. However, many of the leading-edge techniques, such as social media, mobile-marketing and email, are still being explored. Meanwhile, in the rush for the new, older, still-valuable, techniques may be disregarded. In this report you will see that marketers tend to overestimate the impact of the new (social media) while discounting dramatically some aspects of the old (personal recommendation, sampling and couponing).

IPM Insights have scoped out a range of research activities bringing the bright light of day into some of the darker corners of the promotion cupboard. Ongoing research is also looking at tightly-targeted delivered couponing and on-pack promotions as a direct alternative to discounting.

One twist is the involvement of the store management and supply chain in the incentive process. They are as legitimate a goal for getting behind promotions as the shopper, since the report shows that the single biggest reason for shopper coupon misredemptions against other products was that they were unable to find the brand they wanted to buy.

This result is no surprise since it was predicted in the last IPM white paper.

Media and Activity Synergy
Over the next few months, the IPM will be looking at ways to make promotions and media work better together. The IPA has just produced a ground-breaking analysis of the way its award winners reached the pinnacle. It concludes, in a white paper that is well worth the cover price, that;

1) TV is still the most effective medium for driving both hard and soft measures, but press and outdoor can play an extremely important role as a lead medium on a plan.

2) Three is the most effective number of advertising media to drive hard business measures, but the more the merrier for intermediate measures.

3) Advertising coupled with a sales conversion channel, such as direct marketing or sales promotion, is the most effective combination to drive hard business success.

4) Advertising coupled with sponsorship or PR is the most effective combinations to drive intermediate metrics, such as brand affinity.

The IPM is already planning linking promotions to media, working initially with posters. We would welcome links with press and other media to extend this.

In the modern climate, more hard results would be welcome for brands, agencies, shoppers and retailers.
Colin Harper BSc MA, Head of Insight, Institute of Promotions Marketing

The 7th Annual (2011) *fast.*MAP Marketing-GAP Tracker

This is the *Seventh Annual (2011) fast.MAP Marketing-GAP Tracker,* the only marketing study which tracks both consumer and marketer activity and opinion.

It has been tracking changes in consumers' view of the marketing industry and their reactions to marketing innovation since 2005 and simultaneously checking whether marketers have been keeping pace with these changes.

Marketers have long asserted that their goal is to reach the right people at the appropriate time with the perfect message; thereby increasing sales, improving profits and strengthening brand image – the opposite of advertising's mass market approach.

To enable marketing to achieve its goals, it needs to adopt a scientific, technical, targeted approach, by collecting customer and prospect information and generating and heeding consumer feedback to stay in tune with the marketplace.

The aim of this research is to alert marketers to changes in the shopping environment and provide them with the self-knowledge to enable them to keep pace with change and improve their performance.

The GAP

In the seven years the *fast.*MAP Marketing-GAP study has been tracking, it has repeatedly illustrated that on some issues, some marketers stubbornly cling to outmoded industry theory rather than listening to and learning from the consumers they claim to be scientifically targeting.

Meanwhile, at the other end of the spectrum, marketing's frontiersmen are enthusiastically embracing SMS, mobile marketing, Twitter and social networks, seemingly unaware that their enthusiasm is not shared by nine out of ten members of the public who say they do not want to be contacted by these routes.

It's easy to forget that text messaging was around as a viable marketing contact route before email, yet email's popularity has risen steadily to rival – and in some instances – overtake the supremacy of direct mail. Meanwhile, SMS messaging and mobile marketing have failed to spark the public's enthusiasm as marketing media.

If marketers are to ensure they make the most cost-effective use of the many promotional routes now on offer, they need to spot consumer preferences as they emerge to exploit them ahead of the herd, while simultaneously avoiding wasting budget on unpopular fads.

Executive Summary

Why nine out of ten people open direct mail

- Highest marketing-mail opening level since tracking began in 2005
- Increases in the number opening both warm and cold mail
- For seven years more than half of consumers have been most likely to open mail from a known company/brand
- Personalisation has increased in importance as a motivator and moved into second place
- Interested in product or service is almost as important
- May contain or can see it contains a coupon or voucher retain fourth and fifth positions

Why some mail is thrown away unopened

- 13% of households say they throw away mail unopened
- Two thirds of this slowly-shrinking minority do so because they are not interested in the product
- Four out of ten do so because they object to receiving marketing material
- And almost six out of ten do so because they are not interested in the company

Preferred contact routes

- Mail and email level-pegging in popularity stakes
- But each medium is favoured for the delivery of information about different types of product and service
- Demand for contact via any medium other than email and mail remains exceedingly low
- Apart from a handful of very specific exceptions, averages of less than two per cent of consumers are happy to receive marketing information via landline, mobile, SMS, Twitter or social media

The mail most likely to be opened

- Eight out of ten households open mail which is expected, requested, personalised or from a company they use
- The trend for mailed marketing to become more popular year-on-year continues
- Mail contact about all types of local shops, services and events has remained the firm favourite across all the tracking waves since the study began in 2005

Attitudes to advertising mail

- Three quarters of households do not regard direct mail they are expecting as advertising
- Six out of ten do not regard personalised marketing mail or communications from companies they are using to be advertising
- Four out of ten households don't mind receiving advertising mail
- Almost as many keep useful mail items
- A third search their mail for coupons and offers
- Two out of ten people pay more attention to mail about something they have seen advertised
- Almost as many agree direct mail increases their awareness of products and services they had not heard of

Useful mail

- Most people find marketing mail which contains discount coupons and product samples the most useful - a third more than consider Government information to be useful
- A third of householders find mailed competitions, promotions and customer magazines useful

The marketing messages which are read straight away…

- Financial, utility and supermarket mail is most likely to be read straight away

… opened later…

- Mail order catalogues and supermarket information is most likely to be set aside for later opening

… kept…

- A letter or email from a company the recipient uses is most likely to be kept

… or ignored

- Three quarters of consumers ignore and delete pop-up ads on a websites
- Six out of ten ignore door-dropped leaflets, social network invitations to become a friend and email from unknown companies

Mail effectiveness

- More than four out of ten people have used a voucher or coupon mailed to them
- Almost three out of ten have visited a website after receiving a mail pack
- Two out of ten have bought something online and 15% have visited a store

Fewer object to both cold and warm contact

- The number of people who object to both cold and warm marketing contact via all media has dropped – by a significant seven per cent for warm contact and one per cent for cold
- Preference for email contact has jumped by six per cent, more than making up for last-year's two per cent drop

Landline's slow rise back into favour

- Over the years, the trend for landline to become gradually more popular continues
- Though last year's jump in popularity has not been sustained, the gentle curve of increase over the study's waves since 2005 has now resumed
- A quarter of subscribers like to hear about competitions by landline
- Health and beauty and holidays and travel are second and third favourites
- Mobile contact continues to be only two thirds as popular as landline

The Telephone Preference Service

- Awareness of the TPS continues to grow
- Seven out of ten would prefer a more tailored opt-out service, rather than the current all-or-nothing approach
- Given the chance to opt out of selected subjects only, around half would allow calls on five key marking areas
- Around a third would allow calls on the majority of subjects
- Disturbed leisure, overseas call centres and silent calls remain the main reasons why people enrol

Demand for Text Preference Service continues to grow

- Seven out of ten people would enrol in a text preference service if one existed

COUPONS and OFFERS

Motivational power

- Number of shoppers who redeem coupons continues to grow - to a massive 88%
- Almost four out of ten will redeem a 20p coupon
- More than half will redeem a coupon worth £1 or more
- Seven out of ten shoppers redeem coupons occasionally; two out of ten regularly; only one in ten never does so
- Coupon misredemption falls still further as retails take their supervisory role more seriously
- Misredemption attempts most likely where selected retailer has no stock of featured brand

Offers that changed shopping habits

- Six out of ten shoppers participate in loyalty schemes
- Most people take advantage of several different kinds of offer, discount or promotion
- To qualify for club card offers, a third of shoppers bought more products than they'd planned
- Other offers were only a quarter as successful at motivating extra product purchase
- Four out of ten took part in a loyalty scheme
- A fifth of those who sampled a product went on to buy
- Almost eight out of ten people prompted by discounts and special offers to buy up to 30% of their weekly shop

CONSUMER BEHAVIOUR

Where shoppers go for product advice

- Almost half of shoppers took advice from a variety of sources before buying
- The majority learn about promotions online
- Around four out of ten receive promotional information in store or by mail
- Slightly fewer do so on-pack or via websites

SMS and mobile marketing acceptance improves

- A quarter don't object to marketing texts – though most only want to hear from companies they use
- 14% don't object to mobile marketing calls – one in ten from known companies only

Consumers less-dogmatic about opt-out as spam shrinks

- Increase in number who sometimes opt out of marketing contact – decrease in those who always do
- Though seven per cent now receive no unsolicited emails, twice as many receive more than 21-a-day
- Three quarters object to receiving some of this spam

FUNDRAISING

Donor loyalty high

- Of the six out of ten who donate to charity, almost half have remained loyal to a cause for more than ten years
- This year, donors have become far less coy about revealing how much they give
- In 2010, almost half of quarterly givers refused to say how much; in 2011 all but 14% provided this information
- Similarly, last year almost half of annual donors did not reveal their donation size – in this wave all but 12% responded
- Most of these newly-revealed quarterly and annual donors give modest amounts
- But the data boost has cloaked other year-on-year movement in donation-size

Why donors began to give…

- The most common reason people begin to give is that they've "always wanted to help a particular charity"
- Around half as many know someone who was helped by the charity

… keep giving…

- Six out of ten donors continue to give because they believe their charity is "a worthwhile cause"
- 11% "relate to the cause"

…and stop giving

- Since 2005, the main reason donors have stopped giving is that they can no longer afford it
- Followed by 17% who are unclear about how their money is helping

Phone contact by charities remains unpopular

- Eight out of ten of those enrolled in the TPS would not be happy for charities to phone them
- Only seven per cent of donors feel charities should be excluded from the TPS.

Conclusion

This year's ***fast*.MAP/ IPM Marketing-GAP Tracker** provides a spark of marketing joy in the midst of the seemingly endless stream of global financial gloom.

Many of last year's trends continue – and almost all of them are good.

The percentage of those who open direct mail has reached an all-time high and each year the minority who throw away mail unopened shrinks.

The popularity pendulum which swings slightly towards email one year and back to mail the next is poised between the two; and although it is still only a tiny minority of consumers who prefer to be contacted by landline, mobile, SMS, Twitter or social media, that minority has at last begun to grow.

Almost everyone redeems some of the coupons they receive and each year people become less likely to misredeem them. Fewer people "always" tick the opt-out box and more donors are prepared to reveal how much they give to charity.

What's more, the GAP, between some types of consumer activity and opinion and marketers' expectations of what that behaviour will be, has begun to narrow.

Certainly, marketers seem more in tune with the rankings of the mechanisms and motivations which people use, identifying the most and least popular – even where the percentages they hazard continue to fall wide of the mark.

It seems that marketers are rising to the tough challenges of a sluggish marketplace and consumers are more willing to make the most of any marketing opportunities on offer.

David Cole, MD, *fast*.MAP.

Illuminating the GAP

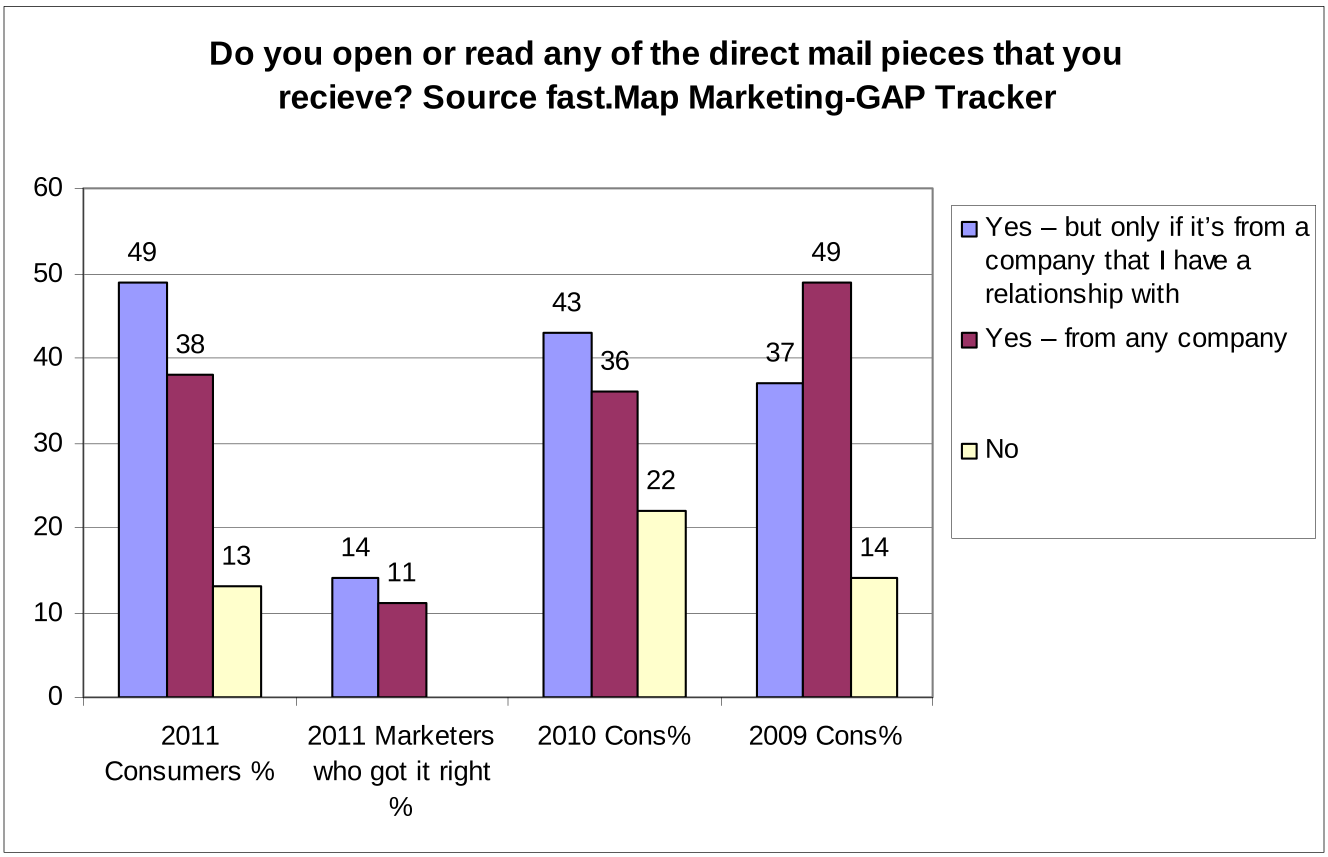
It is surprising how much consumer attitudes can change in the course of a year. But one thing does endure – the popularity of marketing mail.

Nine out of ten people open mail packs
Almost nine out of ten (87%) of UK adults open and read mail packs – up a massive eight percentage points on last year and a new record high.

This follows last year's dip from the previous high of 86% in 2008 and 2009.

Of this 87%,

- 49% – up from 43% last year and 37% in the previous two years – only open mail from companies with which they have a relationship
- 38% – up from 36% in 2010 – open communications from all companies.
- 13% – down significantly from last year's 22% – do not open promotional mail. In 2008 and 2009 the figure was 14%.
- This illustrates the massive improvement in public acceptance of marketing mail which has taken place since the very first *fast.*MAP Marketing-GAP Report in 2005, when 26% did not open promotional mail.



The GAP
Only 14% of marketers correctly judged that between 41% and 50% of consumers would open and read marketing mail from companies they use – a third optimistically presumed the figure would be higher.

Similarly, 11% of marketers anticipated the correct 31-to-40 percentile of those who open mail from any company – 56% thought it would be less.

The reasons people open promotional mail

In the seven years since the first *fast.*MAP Marketing-GAP Tracking Study, consumers have been most likely to open and read personally-addressed mail, from brands or companies they know and about products or services which interest them.

- The percentages fluctuate year–to-year, but on average, more than half – 55% in both the 2010 and 2011 waves – always place "known company or brand" as the main motivation to open and read
- Personalisation has jumped in importance since 2010, by five percentage points, to 50%
- Third most important is "interest in product or service" – 46%, one percentage point less than last year
- "May" and "can see" mail pack contains coupons remain in the fourth and fifth positions – as they have been since 2009
- In 2009, the "may contain a coupon" option was added and took the number three position until 2010. Before this there was only the "see it contains a coupon" option, which had been in fourth position since the tracker was launched in 2005.
- Interest in local services or events has remained at 21% since 2009
- The motivational value of the design aspects of mailings – interesting package; looks fun; attractive envelope; and design – have decreased in motivational power in the last year, keeping all these at the bottom of the "What makes you decide to open direct mail" table for the seventh year.
- Colour has slightly increased in importance – by one percentage point to four per cent – but not enough to raise it from the bottom of the table.

What makes you decide to open/ read a direct mail pack? Please tick all of the answers, which you think apply. Source, f*ast.*MAP Marketing-GAP Tracker	**2011 Cons %**	**2011 Mkr %**	**2010 Cons %**	**2009 cons %**	**2008 cons %**	**2007 cons %**	**2006 cons %**	**2005 cons %**
From brand/company that I know	55	64	55	50	55	56	47	51
Personally addressed to me	50	52	45	47	51	49	43	-
Interested in the product or service	46	59	47	42	50	46	42	50
May contain a coupon/voucher	**38**	55	40	44	-	-	-	-
See it contains free sample/voucher	36	56	35	38	39	40	36	43
Local services or events	21	28	21	21	27	24	21	28
Because it's a competition	18	27	19	19	21	20	18	23
Interesting package	15	34	19	15	15	19	17	21
Looks fun/ humorous	9	25	10	8	10	11	10	14
Attractive envelope	4	20	6	4	6	6	6	7
The design	4	23	7	3	6	6	6	7
The colour	4	12	3	1	3	3	3	3

The GAP

- Marketers correctly identified consumers' top five motivations to open mail
- In fact, after underestimating the power of coupons in the tracker's early years, they are now overestimating their motivational benefits
- As has been the case since the first survey seven years ago, marketers massively overestimated – by two to three times – the importance of an attractive envelope, design and colour. These have always been seen by consumers as least important. (Though not by as much as in 2010 when marketers judged them to be five or six times as important as did the consumers.)

Why people throw away unopened mail packs
Two thirds of the 13% who throw away unopened mail packs do so because they are not interested in the product; six out of ten (58%) because they are not interested in the company; and more than four out of ten (43%) because they object to being sent marketing.

Since 2005, these have been the three main motivations for disposing of mail without opening it – and this year, for the first time, all three have seen significant drops in importance since last year.

Among those who throw away marketing mail unopened, there has been a massive drop of 24% – from 67% to 43% – in the number who do so because they object to being sent marketing material. ***NB** Only the 13% who said they throw away some mail unopened were asked this further question about why they did so – so the table below does not refer to the full panel, only those already identified as disposing of some unopened mail.*

What makes you decide to throw away an unopened mail pack? Please tick all of the answers, which apply. 2011 *fast*.MAP Marketing-GAP Tracker	**2011 Cons %**	**2011 Mkr %**	**2010 Cons %**	**2009 cons %**	**2008 cons %**	**2007 cons %**	**2006 cons %**	**2005 cons %**
Not interested in the product	67	74	75	69	76	68	66	66
No interest in the company	**58**	73	75	74	66	66	59	61
Object to being sent marketing	**43**	54	67	70	63	60	66	61
Not personally addressed	**23**	59	34	39	41	40	33	33
Incorrectly addressed	8	46	12	16	-	-	-	-
Lack of time	**11**	35	8	19	20	19	17	13
The design	6	9	4	5	7	5	5	5
The colour	4	8	3	4	4	3	4	3
Other	6	7	6	5	6	4	3	7

The GAP
Until this year, marketers have massively underestimated (by an average of 23%) the strength of consumer's three main reasons for not opening mail packs – namely, 'no interest in the company', 'not interested in the product' and 'object to being sent marketing'.

They have simultaneously greatly overestimating the influence of the other – mainly aesthetic – considerations for not opening, by an average of more than 20%.

- In this 2011 wave their readings of the marketplace are more accurate when it comes to identifying the three to reasons for not opening marketing mail
- However marketers assume the lack of a personal address is more than twice as important as is the case
- Similarly, they overestimate by five times the relevance of an incorrect address as the reason for failing to open mail
- And they assume lack of time is three times as prevalent as is the case

The contact routes people favour

Mail v email

Each year the Marketing-GAP Tracker has reported on the relative popularity of email and mail – and this year they are level-pegging with an average popularity of 28%.

But closer examination of the latest findings reveals that people are most "happy" to receive communication by email rather than any other medium about the following nine marketing goods and services:

1. Books – 37%, down one percentage point on 2010
2. Competitions – 48%, no percentage change year-on-year
3. DVDs – 35%, down two percentage points
4. Events and entertainment – 37%, up one percentage point
5. Health and beauty – 30%, up three percentage points
6. Holidays – 37%
7. Home improvement/ gardening 32%, up four percentage points
8. IT/Computers – 32%, down three percentage points
9. Mobile phones/ services – 26%, down one percentage point.

Mail is favourite communication route for all the other goods and services investigated

There has been a five percentage point increase – to 30% – in those happy to hear about local restaurants and take-aways by email.

There has been an average 2.75 percentage point increase in those happy to hear about cars, local services/ trades-people/ local shops, supermarkets and utilities companies by email.

Except for the increases mentioned above, fewer people than last year are "happy" to receive marketing contact via either mail or email.

Landline, mobile, SMS, Twitter, social media

Continuing last year's trend, there is almost no consumer demand to be contacted about any marketing subjects by media other than mail and email.

In fact, less than two per cent of adults want to be contacted by any route other than mail or email about any subject except for the following ….

- Landline calls about banking and cars – both three per cent
- Mobile contact about mobile phones/ services – three per cent
- SMS messages about mobile phones and services; and competitions – five per cent; supermarkets and stores – four per cent
- Twitter messages about competitions – four per cent
- Social media messages about competitions – five per cent; supermarkets and stores; and health and beauty; local restaurants and takeaways; education and further education courses and classes; and books – all three per cent.

Consumers 2011 v 2010

Indicate all subjects you would <u>be happy</u> to receive communication about? Tick all that apply. *Source fast.MAP Marketing-GAP Tracker*	**2011 Con % Dir. Mail**	2010 Con % Dir. mail	**2011 Con % Email**	2010 Con **%** Email	**2011 con % Land -line**	2010 Con % Land -line	**2011 Con % Mob. Calls**	2010 Con % Mob. calls	**2011 Con % SMS**	2010 Con % SMS	**2011 Con % Twitt**	2010 Con % Twitt	**2011 Con % Social Media**	2010 Con % Social Media
Banking	**34**	36	**30**	30	**3**	2	**0**	2	**2**	2	**0**	1	**0**	1
Books	**32**	31	**37**	38	**2**	1	**0**	1	**1**	1	**2**	1	**3**	2
Cars	**26**	23	**23**	21	**3**	1	**1**	0	**2**	1	**1**	1	**2**	2
Charities	**26**	30	**25**	23	**1**	1	**1**	1	**2**	1	**1**	1	**2**	1
Customer magazines	**30**	30	**22**	21	**1**	1	**1**	0	**1**	1	**1**	0	**2**	1
Competitions	**37**	37	**48**	48	**2**	2	**2**	2	**5**	2	**4**	1	**5**	4
DVDs	**26**	26	**35**	37	**1**	1	**0**	0	**1**	1	**1**	1	**2**	2
Education/further ed. courses/classes	**30**	32	**25**	24	**2**	1	**0**	1	**1**	1	**1**	1	**3**	1
Events/ entertainment	**30**	34	**37**	36	**0**	1	**1**	1	**1**	2	**0**	1	**2**	4
Financial Services	**25**	25	**22**	24	**2**	1	**1**	0	**0**	1	**1**	1	**2**	1
Gym/ Health Clubs	**19**	19	**17**	20	**1**	1	**1**	1	**1**	1	**0**	1	**2**	2
Health and Beauty	**25**	27	**30**	27	**1**	1	**1**	1	**1**	1	**1**	1	**3**	2
Holidays	**32**	34	**37**	37	**1**	2	**0**	1	**1**	1	**1**	1	**2**	1
Home improvement/gardening	**29**	29	**30**	26	**0**	1	**1**	0	**1**	1	**1**	0	**1**	1
Insurance	**30**	29	**25**	27	**1**	2	**1**	1	**1**	1	**1**	1	**1**	1
IT/ Computers	**25**	23	**32**	35	**1**	1	**1**	1	**2**	2	**1**	0	**2**	1
Loans/ credit cards	**20**	20	**20**	20	**1**	1	**0**	1	**2**	1	**0**	1	**2**	1
Local Restaurants/ Take-aways	**42**	47	**30**	25	**1**	2	**1**	1	**2**	1	**1**	1	**3**	3
Local Services/Trades people/ shops	**44**	43	**29**	24	**1**	2	**1**	1	**1**	1	**1**	1	**2**	1
Mail order catalogues	**36**	35	**23**	23	**1**	1	**1**	1	**1**	1	**1**	0	**1**	1
Mobile phones /services	**21**	23	**26**	27	**2**	1	**3**	3	**5**	4	**2**	1	**2**	1
Mortgages	**18**	20	**17**	18	**1**	1	**2**	1	**0**	1	**1**	1	**1**	1
Newspaper subscriptions/vouchers /offers	**35**	37	**30**	30	**2**	2	**0**	1	**1**	1	**1**	2	**2**	2
Supermarkets/ Stores	**46**	48	**45**	42	**2**	1	**1**	1	**4**	1	**2**	1	**3**	1
Utility companies	**30**	33	**29**	28	**2**	2	**0**	1	**1**	1	**0**	1	**1**	1
Broadband / cable / landline suppliers	**28**	30	**31**	33	**1**	3	**0**	1	**1**	2	**1**	1	**1**	2

Marketers 2011

Do you think that there are some things that consumers are happy to receive communication about? If so, please state how you think they prefer to be contacted i.e. they like to receive direct mail for local restaurants, events and insurance? Source: 2011 *fast*.MAP/ IPM Marketing-GAP Tracker

	Mktrs % Direct mail	Mktrs % Email	Mktrs % Land-line	Mktrs % Mobile call	Mktrs % SMS	Mktrs % Twitter	Mktrs % Social Media
Banking	61	31	15	10	8	1	3
Books	42	42	7	2	5	7	14
Cars	44	33	7	4	5	6	12
Charities	43	33	9	4	8	6	16
Customer magazines	43	30	4	3	5	5	10
Competitions	45	50	6	4	14	12	21
DVDs	38	47	4	3	6	9	18
Education/further education courses/classes	50	35	8	3	5	7	13
Events/entertainment	44	49	5	5	16	18	25
. Financial Services	44	26	7	3	5	2	2
. Gym/Health Clubs	38	33	7	5	7	9	15
. Health and Beauty	38	37	6	4	9	13	21
. Holidays	51	46	5	3	7	8	16
. Home improvement/gardening	42	29	5	3	5	4	8
. Insurance	44	30	7	4	4	2	4
. IT/Computers	32	34	4	3	4	7	8
. Loans/credit cards	37	23	7	3	4	2	4
. Local Restaurants/Take-aways	53	32	5	3	11	13	16
. Local Services/Trades people/Local shops	47	27	5	4	8	11	15
. Mail order catalogues	48	23	5	2	2	5	7
. Mobile phones/services	33	33	8	8	14	7	11
. Mortgages	39	22	6	2	5	2	5
. Newspaper subscriptions/ vouchers/ offers	46	32	5	3	6	7	13
. Supermarkets/Stores	48	38	5	4	9	7	11
. Utility companies	41	27	7	5	3	3	5
. Broadband / cable / landline suppliers	38	34	7	5	7	5	8

The GAP

- For the first time since the study began, marketers have begun to trim their expectations about the public acceptance of marketing contact via landline, mobile phone and SMS messaging to single-figure percentages. However, these percentages are at least four times overinflated.
- And although they correctly identify that there is extra interest in contact about competitions via SMS, Twitter and Social media they gauge this at 14%, 12%, and 21% respectively – instead of five per cent; four per cent and five per cent, respectively
- Similarly, they continue to overestimate people’s willingness to welcome social media and Twitter contact – by about ten times and five times, respectively.

Direct mail on some subjects more popular now than in 2005 – despite media proliferation

- People are now happier to be contacted about most subjects via their letter-box than they were seven years ago
- People have been consistently most "happy to receive" promotional information about local events, shops and services since the first study in 2005
- Printed information about three subjects – supermarkets and stores they use; local services/ trades people/ shops; and local restaurants/ take-aways – has remained significantly more popular than that about any other marketing subjects across all the tracking waves.

Direct mail on seven DM subjects has gained in popularity **year-on-year**:

1. Cars up three percentage points to 26%
2. IT/computers up two percentage points to 25%

The following all increased by one percentage point...

3. local services/ trades people, 44%
4. insurance, 30%
5. books, 32%
6. Home improvement/ gardening, 30%
7. Mail order catalogues, 36%

Two marketing mail subjects have declined in popularity **since 2005**

1. supermarkets and stores they use – down 11% to 46% – although this is still the subject most people are happy to hear about
2. Local restaurants/ takeaways – down four percentage points to 42% – though still second favourite

DVDs, after a surge in popularity in 2009, dropped to their 2005 level of 26% last year and remained unchanged this year.

Are there some things you are happy to receive direct mail about? Source: *fast.*MAP Marketing-GAP Tracker**:**	**2011 Consumers %**	**2011 Marketers %**	**2010 Consumers %**	**2009 Consumers %**	**2008 consumers %**	**2005 Consumers %**
Supermarkets/stores they use	46	48	48	51	46	57
Local Services/Trades people/ shops	**44**	47	43	46	43	36
Local Restaurants/Take-aways	42	52	47	47	47	46
Mail order catalogues	**36**	48	35	35	30	21
Insurance	**30**	43	29	23	21	7
Books	**32**	42	31	31	30	24
Events/entertainment	30	44	34	34	37	38
Home improvement/ gardening	**30**	42	29	28	27	18
Customer magazines	30	43	30	26	24	15
Education/ further education courses/classes	30	50	32	24	25	21
Charities	26	43	30	21	20	12
DVD's	26	38	26	28	24	26
Cars	**26**	44	23	24	18	12
IT/ Computers	**25**	32	23	23	20	21
Financial Services	25	33	23	16	17	11
Mobile phones/ services	21	33	23	16	17	11
Loans/ credit cards	20	37	20	14	14	5

Percentages in plum indicate an increase in popularity since 2005

Bold type illustrates an increase on the 2010 percentage

The GAP Marketers overestimated the popularity of mail by an average of 12 % across all subjects. Last year they overestimated by an average of seven per cent.

The type of mailings most likely to be opened and read

The following advertising mail questions were added to the 2011 questionnaire at the suggestion of the Mail Media Centre. They will be tracked in future waves.

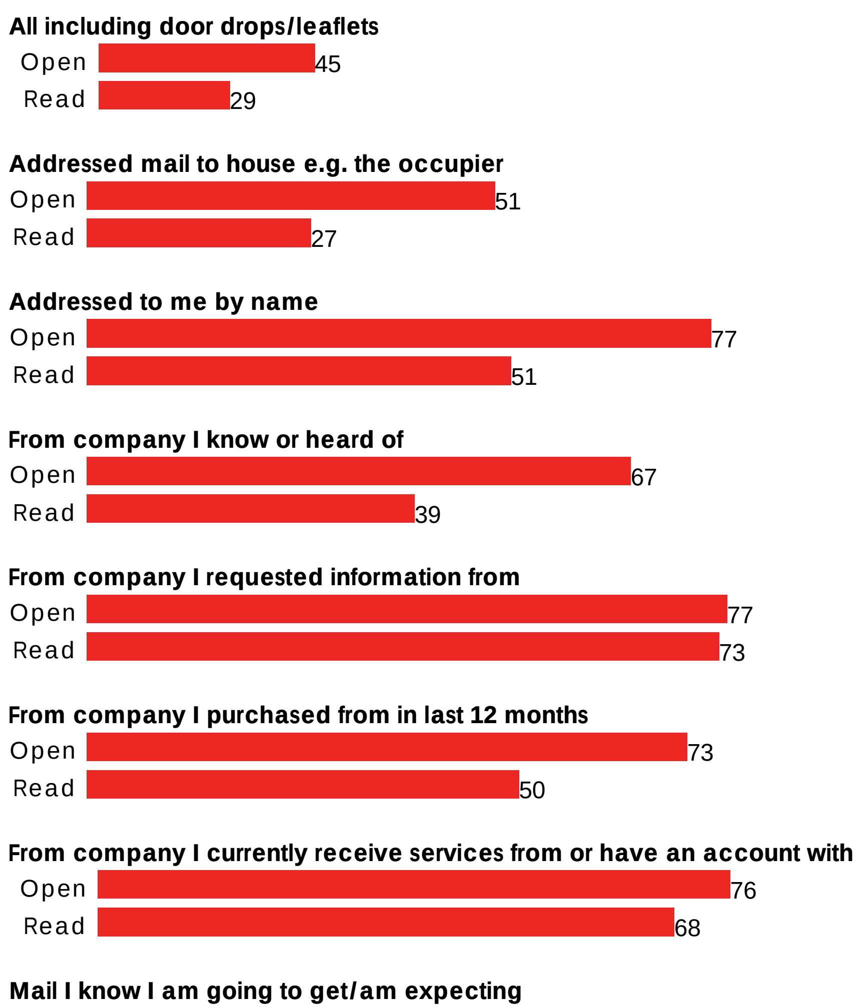
Almost eight out of ten householders will open mail

- they are expecting
- from a company from which they requested information
- from which they are receiving services
- have bought from in the last 12 months
- have an account with
- or which is addressed to them by name

Two thirds will open mail from a company they have heard of.

However, (with the exception of expected and requested mail and mail from companies with which they have an account) around a quarter of those who open mail do not read it!

Please indicate how likely you are to open and read the following types of mail? Would you open or read the following… *Source fast.MAP/ IPM 2011Marketing-GAP Tracker*



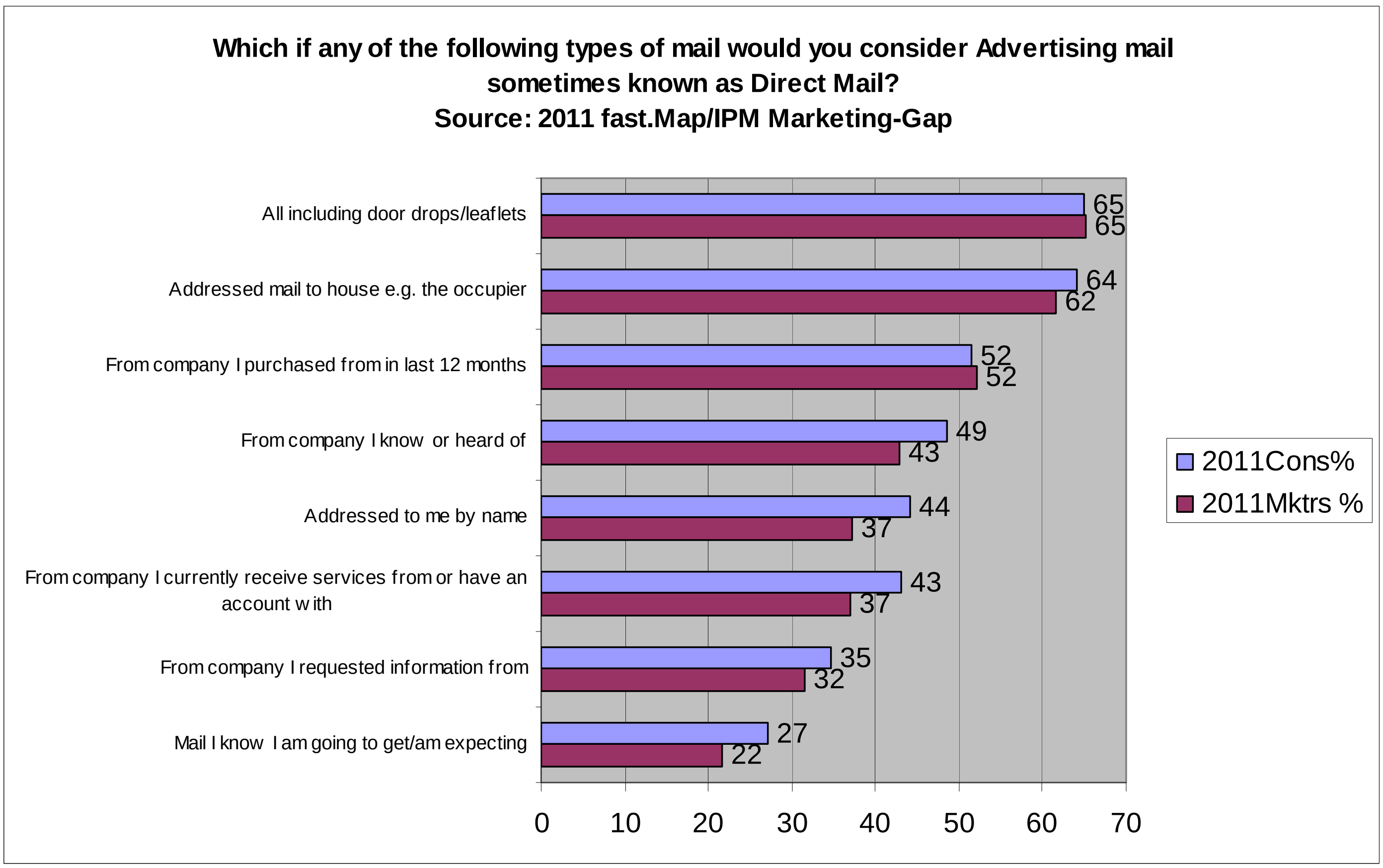

Open
75
Read
74
1,114 respondents

The things people label as advertising mail
Two thirds of householders consider all door drops, leaflets and items addressed to the occupier to be advertising mail; as do half of those who receive mail from companies they know, have heard of or have bought from in the last 12 months.

However, six out of ten do not regard marketing mail addressed to them by name or from a company they are currently using as advertising

And two thirds do not regard company information they requested as advertising.

However, almost three quarters do not regard mail they know they are going to get and are expecting as advertising.

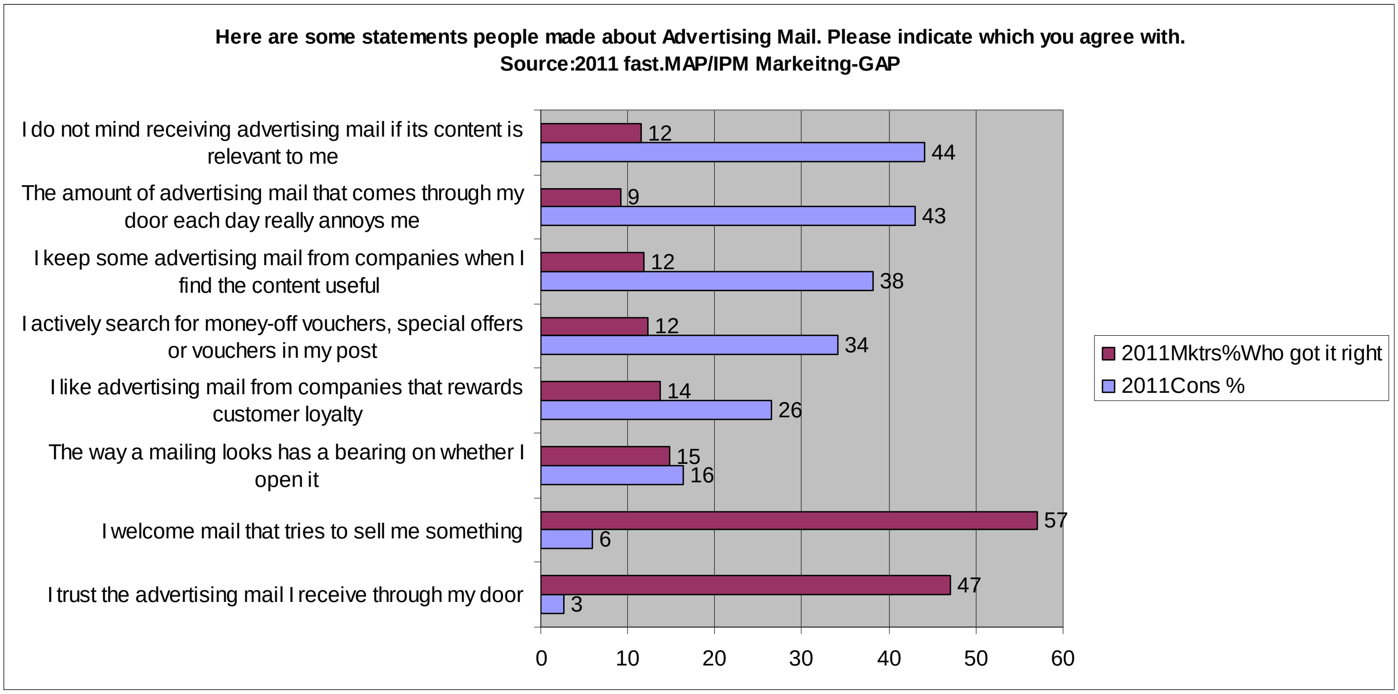


The GAP
Marketers' predictions were reasonably accurate. In fact, they selected the correct percentages of those who would regard "all including door drops and leaflets" (65%) and mail "from a company I purchased from in the last 12 months" (52%) as advertising mail.

They were only two percentage points below the correct percentage (64) of those who considered information with an "occupier" address to be direct mail.

Attitudes to advertising mail

- Four out of ten householders do not mind receiving relevant advertising mail
- The same number express annoyance at the amount they receive
- Almost as many keep items if the content is useful
- 34% search their mail for money-off vouchers or special offers
- Six per cent welcome marketing messages and half of these trust them.



The GAP

Marketers think ten times as many consumers trust and welcome advertising mail as is actually the case.

On all other issues except one, they underestimated people's attitudes – typically expecting only a half or a third of the actual level.

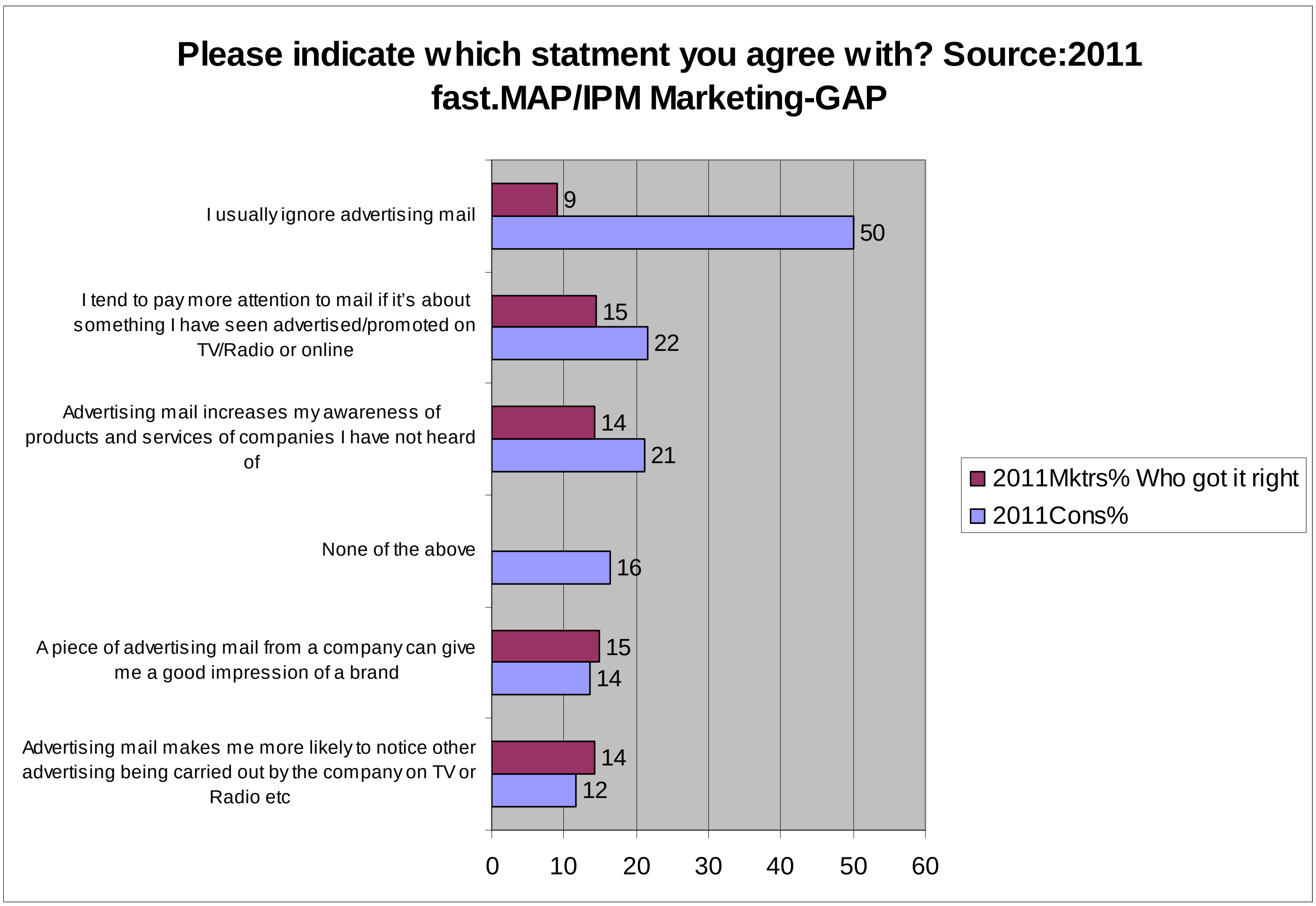
However, they were more accurate and undershot by only one percentage point on the response that the way a mailing looks has a bearing on whether 15% of recipients opened it.

Mail and media advertising

Since half of consumers say they usually ignore advertising mail, the definitions on the previous page are important.

But although there can be little doubt that people must regard mail "about something I have seen advertised on TV, radio or online" as advertising mail, nonetheless, the largest percentage (22%) agree with the statement that they "pay more attention" to this type of message. This illustrates that people regard some types of advertising mail as especially noteworthy, even while professing indifference to it.

Similarly, almost as many 21% agree that "advertising mail increases my awareness of products and services of companies I have not heard of".

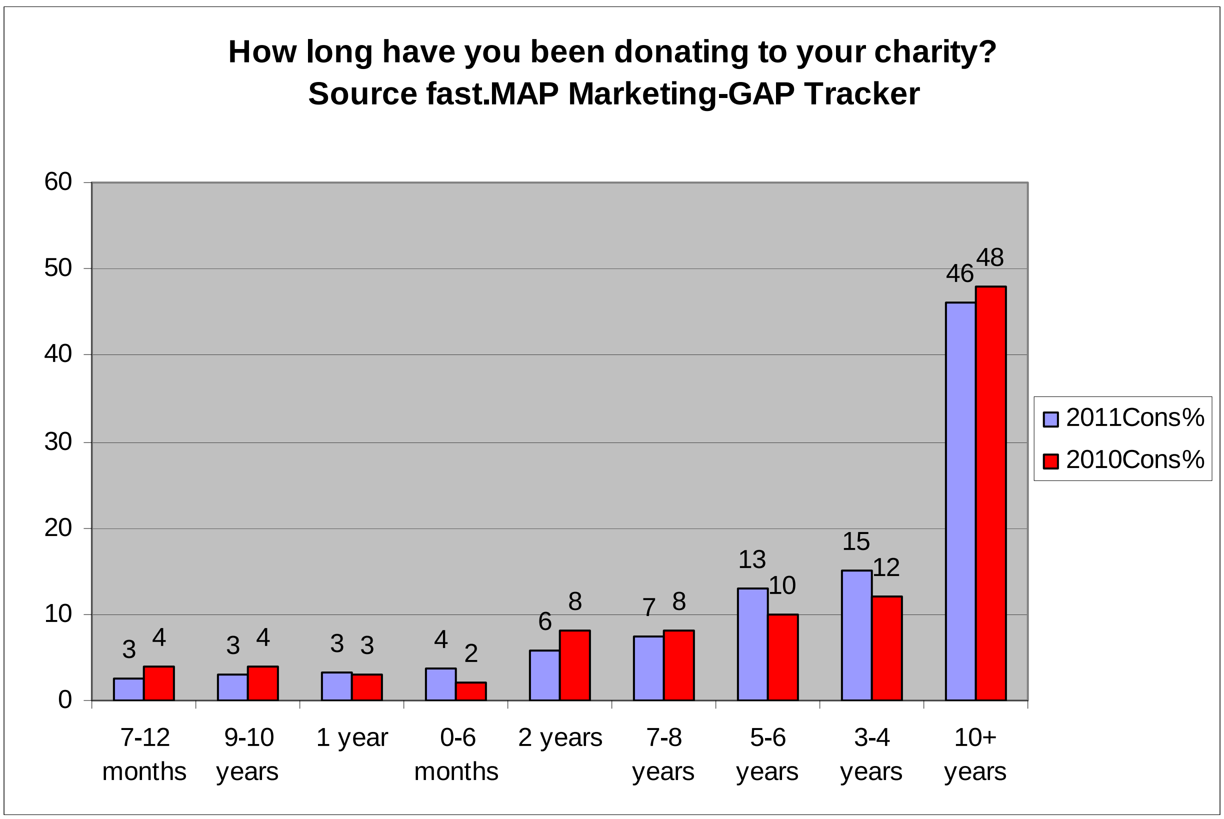


Useful mail
The type of promotional mail the majority of people welcome and find most useful contains coupons, offers or samples.

The *fast.*MAP Marketing-GAP Tracker probes people's attitudes and response to these in various different ways, all of which have confirmed that shoppers like them, open mail they suspect might contain one, save them, use them and are generally happy to receive them.

The finding that six out of ten people (a third more than find Government information useful) find samples, coupons and offers "useful" is a further affirmation of this.

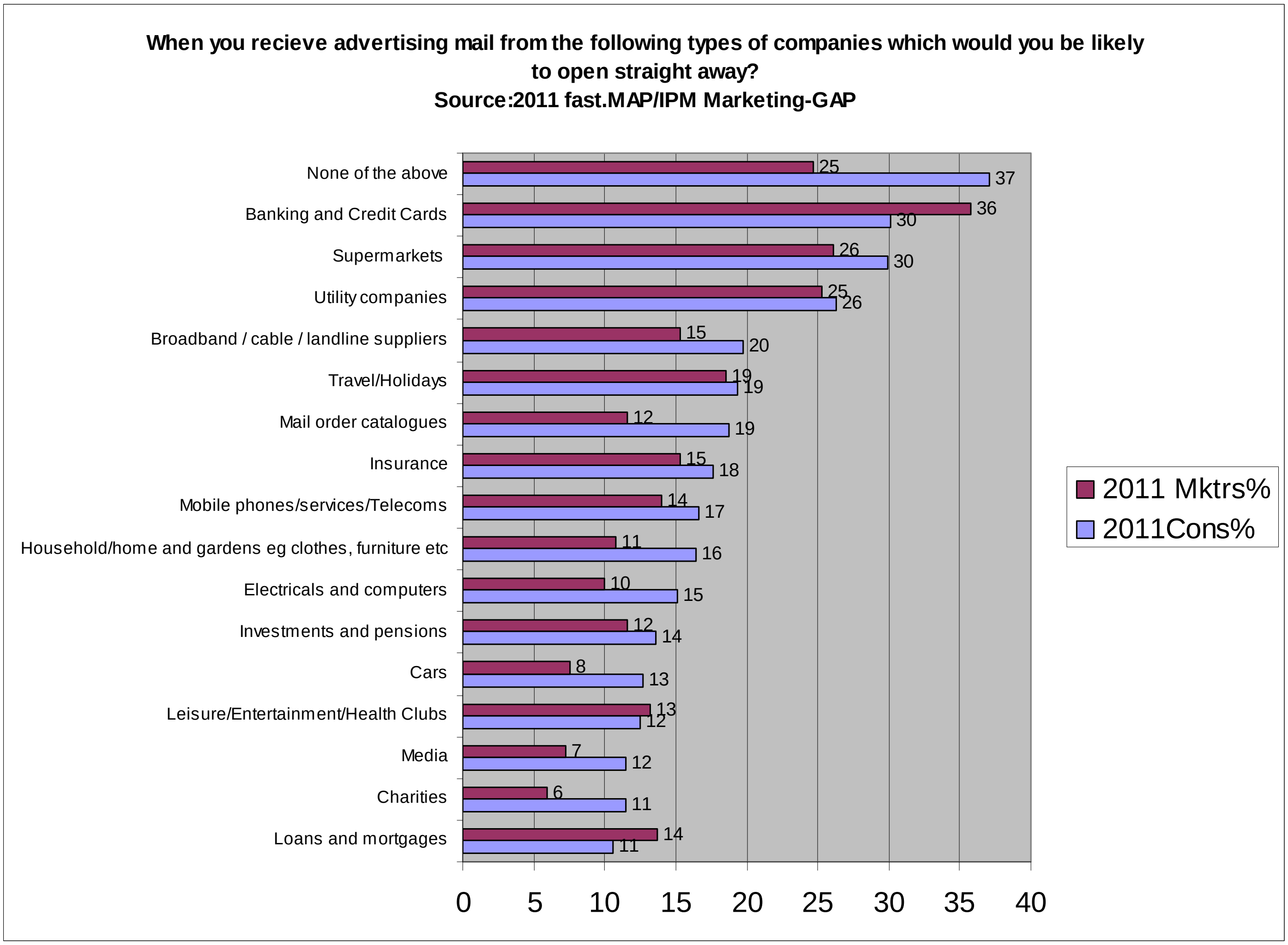
A third find competitions and customer magazines useful and a quarter use catalogues and "general information".



The GAP
Marketers exactly predicted that a third of shoppers would find mail about competitions and promotions useful.
They were almost as accurate in judging consumers' other responses. And although they overestimated the usefulness of samples and coupons, but they were aware that these were the promotions people judged to be the most useful

Financial, utility and supermarket information most likely to be read straight away

- Three out of ten people will open and read information about banking, credit cards, supermarkets and utility companies straight away
- Two out of ten do the same with mail from broadband, cable, landline suppliers, mail order catalogues, travel and holidays and insurance
- Other mail about goods and services is most commonly left until later
- Four out of ten don't open any of their advertising mail straight away

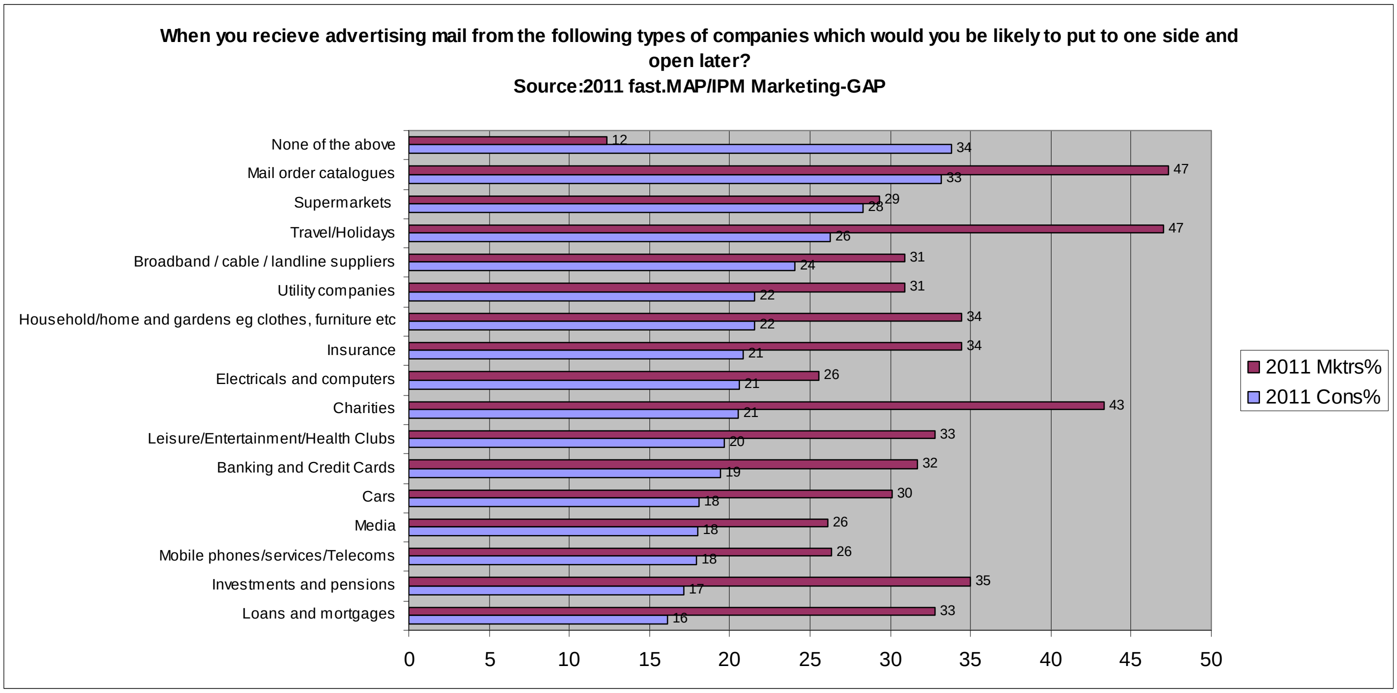


The GAP

Marketers generally underestimated the percentage of householders who would open mail straight away.

Mail order catalogues most likely to be opened later

- A third of householders set catalogues aside for later opening
- 28% do the same with supermarket mail
- 26% travel and holiday information
- 16% – 17% save mail about loans, mortgages, investments and pensions for later
- Between 18% and 24% hang onto information about other subjects

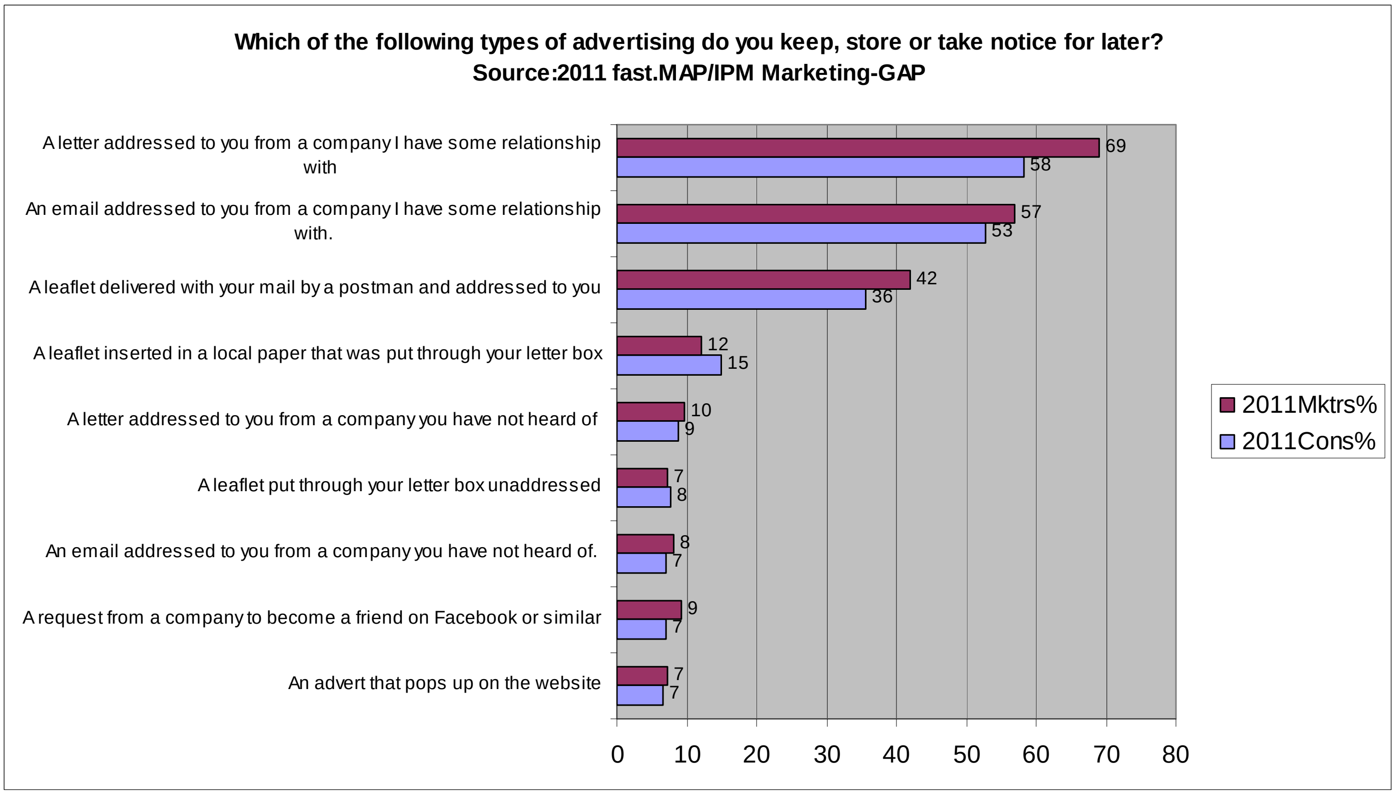


The GAP

Marketers overstated the percentages of people who would delay opening mail in each product category – in some cases by double the actual figure e.g. charities 21% (marketers expected 43%); loans and mortgages 16% (marketers 33%).

Information that's kept

- More than half of recipients keep mail and email from companies they use for later reference
- Anything which is not relevant is five times less likely to be kept – with the exception of an addressed leaflet delivered with mail, which 36% would save.
- The three types of communication which are least and equally unlikely (all seven per cent) to be noted are pop-up ads on websites; company requests to become Facebook friends; and emails from unknown companies.



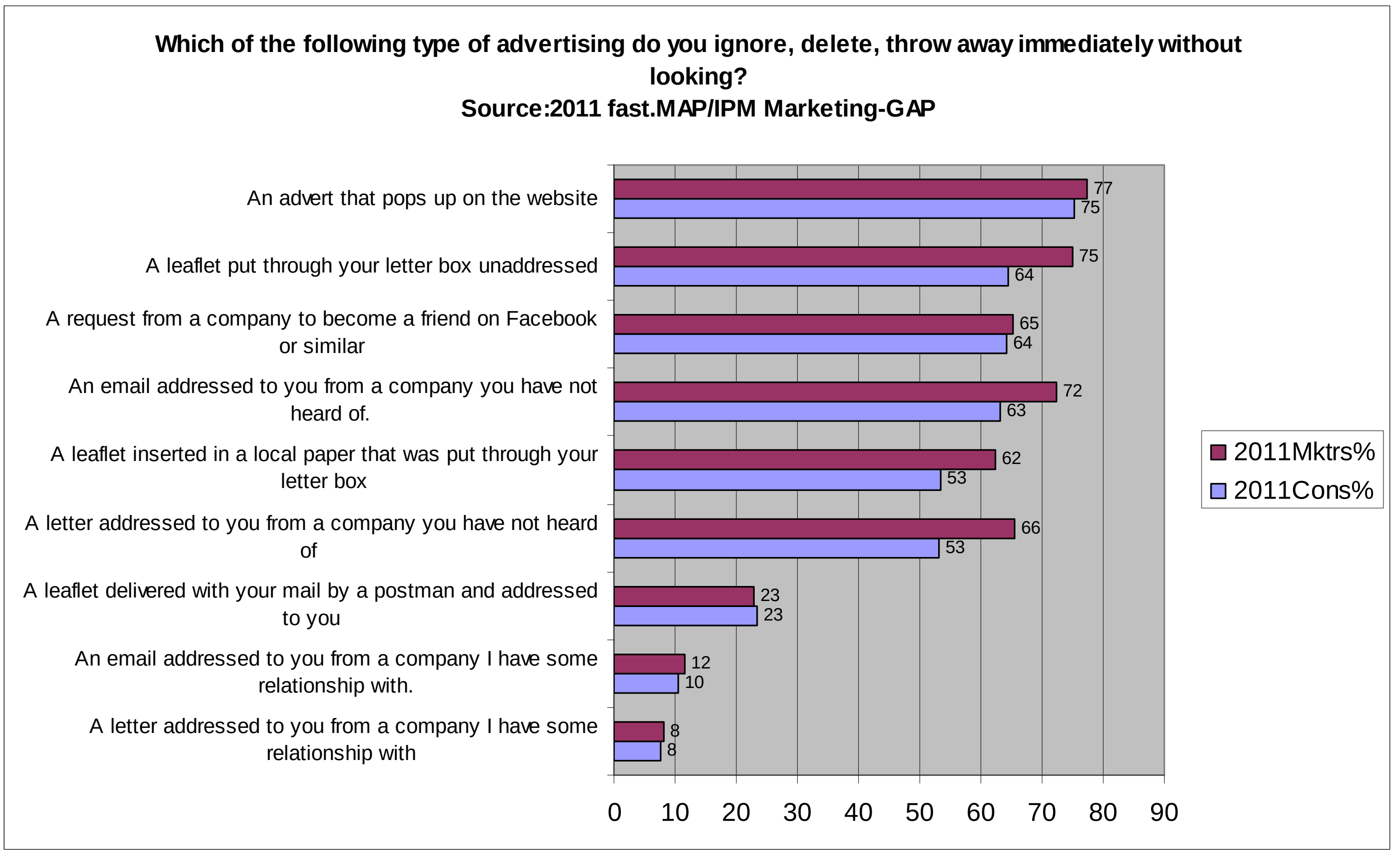
The GAP

Marketers are accurate in their knowledge of which types of communication are most likely to be kept and used later and which are not.

Website pop-ups most likely to be ignored
By asking the reverse of the above question i.e. "Which of the following to you ignore, delete, throw-away immediately without looking?" and offering the same options, it is possible to confirm the above findings.

So it is to be expected that three quarters would ignore a pop-up ad on a website when only seven per cent said they would keep it.

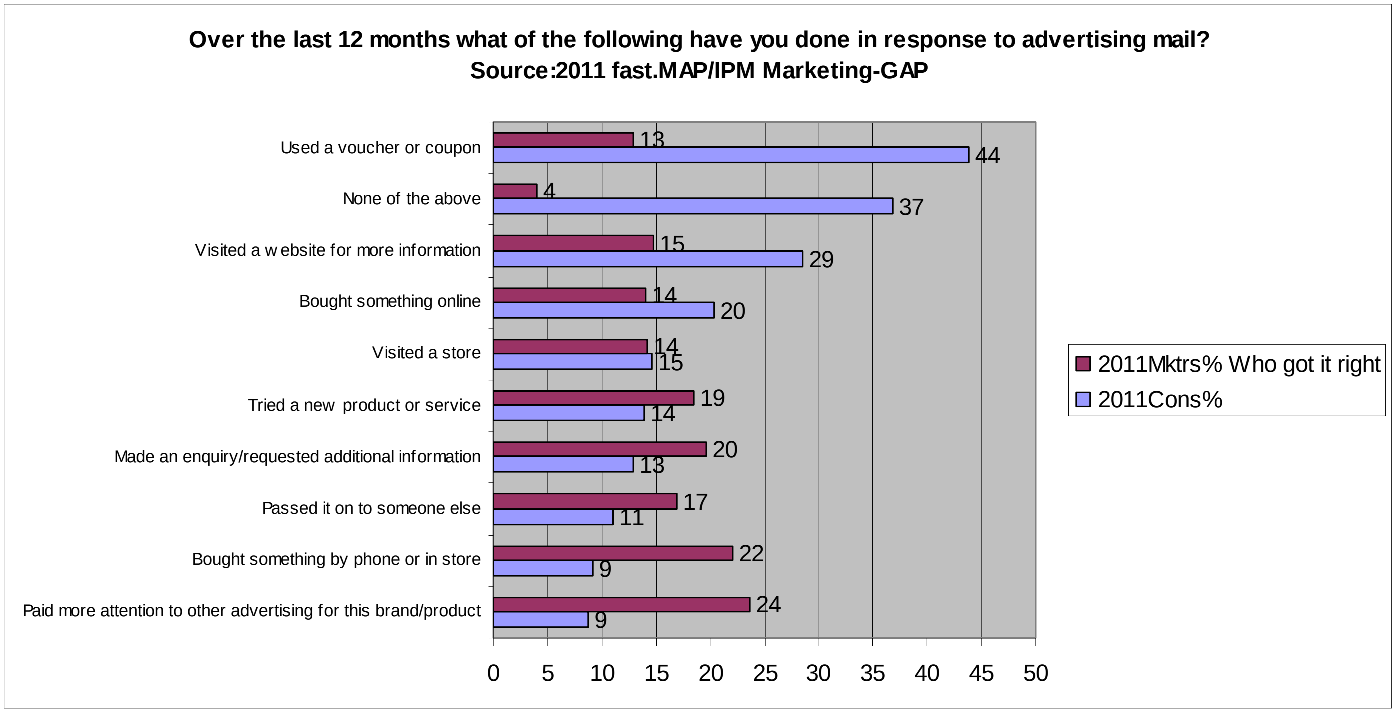
Similarly, around two thirds would throw away an unaddressed leaflet; a company's request to become their Facebook friend; and an email from an unknown company; while only eight per cent would discard a personally addressed letter from a known company without opening it.



The GAP
Marketers were very accurate in their assessment of which types of advertising they would ignore and throw away. Overall, they were likely to slightly overestimate the percentages who would discard communications.

Mail effectiveness

As would be expected in line with other findings in the tracker, the largest group of people to respond to a mailing are the 44% who used a voucher or coupon; followed by 29% who visited a website for more information; 20% who bought something online; and 15% who visited a store.



The GAP

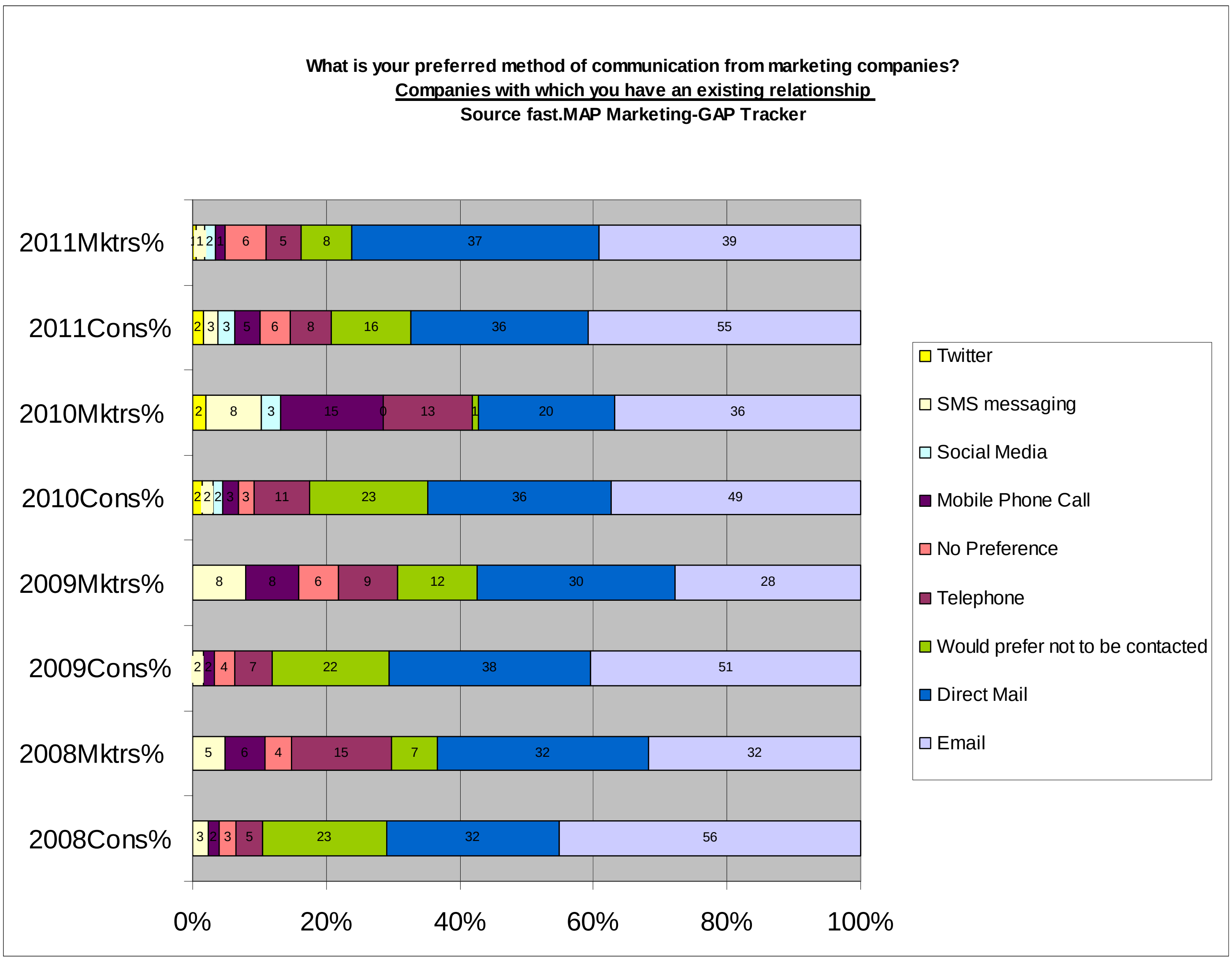
Marketers though adept at judging which types of communication are most likely to be opened or ignored, do not have the same grasp of the ways in which people are most likely to respond to them.

In fact, marketers tended to expect people's most common responses to be least likely and vice versa.

Big drop in number who prefer not to be contact by companies they use
There has been a significant drop in the number of people who would <u>prefer</u> not to receive marketing messages via any medium from both companies they use – from 23% in 2010 down to 16% now – and companies with which they have no relationship – from 67% in 2009, to 65% in 2010 and 59% now –marketers correctly identified the latter.

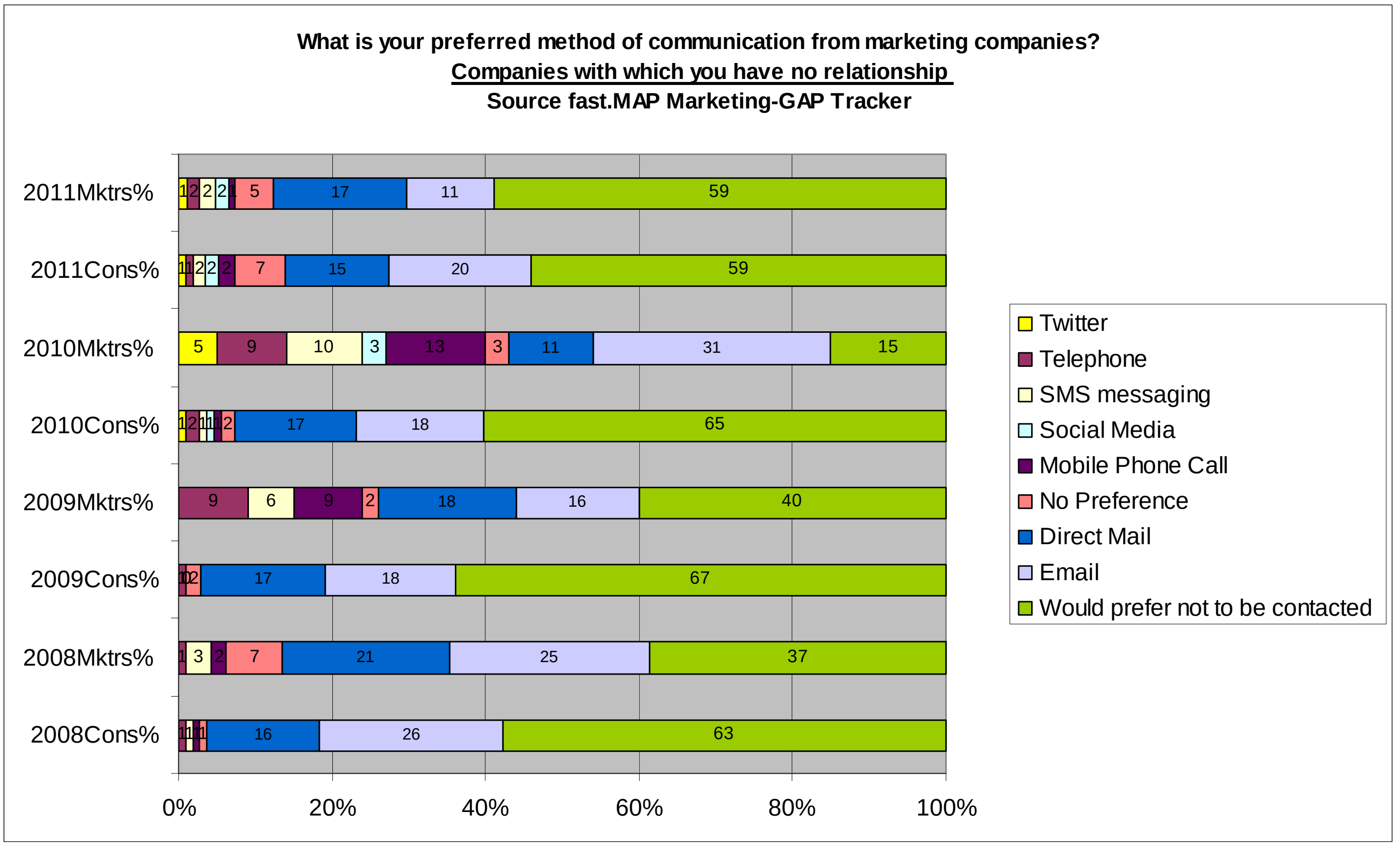
People's preference for marketing contact from companies they use via email has jumped six percentage points year-on-year to 55%, after suffering a two percentage point drop between 2009 and 2010.

There are various reasons for this leap in email popularity
- the falling price and continued improvement in broadband speed and provision
- the advent of workable mobile phone email connectivity
- people's growing familiarity with the internet.



The majority prefer not to be contacted by companies with which they have no relationship
Although 59% prefer not to be contacted by companies they don't use, this is a six percentage point improvement on 2010, when 65% preferred non communication.

A fifth prefer email contact and 15% mail. Two per cent or less prefer contact by any medium other than mail or email by unknown companies.



The GAP
Marketers are gradually beginning to gauge consumers' media preferences more accurately.

In this wave their expectation that 37% would prefer mail contact from companies with which they have a relationship is only one percentage point on the optimistic side.

And their two per cent predictions for SMS and social media were one percentage point below the actual figure – though since these figures are so low this means their judgement was a third out!

However, marketers still fail to realise the strength of people's preference for email from known companies – by 16%.

When it comes to companies where there is no relationship, marketers expected only half the actual number to prefer email. While they over-assessed the preference for mail by a mere two per cent.

Landline resumes crawl-back into favour
Last year's unexpected four percentage point increase in those expressing a preference for telephone landline contact from companies with which they have a relationship (to 11%) has proved to be a blip.

This year's three percentage point drop to eight per cent is in line with the medium's recent history of a more-gradual improvement in popularity since 2008, when only five per cent didn't mind marketing calls.

Before the creation of the Telephone Preference Service (TPS) consumer opinion of telephone marketing had reached an all-time low. Many homes were suffering from a high volume of unwanted and intrusive calls and a proliferation of ominous silent calls – the result of misuse of mechanised dialling technology.

Telemarketing has smartened up its act since then, but consumer perception tends to change more slowly – as the marketers correctly anticipated.

Since 2008, only one in ten has preferred cold contact by landline – except for a one-per-cent spike last year which mirrored the blip in contact preference from companies with which they had a relationship.

The landline calls people don't mind receiving
Around a quarter of people don't mind receiving phone calls about competitions, the most popular subject.

Are there some things that you don't mind receiving marketing phone calls about?. *Source fast.MAP/ IPM 2011Marketing-GAP Tracker*	**2011 Like %**	**2011 Dislike %**
Competitions	24	59
Health & beauty offers	16	69
Holidays/Travel	15	67
Insurance	12	78
Charity donation requests	11	77
Home improvement	11	76
Offers from other mobile phone companies	10	77
Broadband sales calls	10	76
Credit Card offers	9	84
Loans	8	85
Mortgages	8	82

But eight out of ten dislike landline contact about mortgages, loans and credit cards. Two thirds or more really dislike calls about any other subject and more than half (52%) even dislike calls about competitions.

Mobile
Preference for mobile contact from known companies has more than doubled since 2008 – though from a very low two per cent to five per cent.

It remains only two thirds as popular as landline contact.

Telephone Preference Service
Awareness of the Telephone Preference Service (TPS) has increased by one percentage point since last year, to 60% (after an increase of two percentage points in 2009).

And enrolment figures have recovered to within one percentage point of 2009 level – 29% – from 24% 2010.

Currently, the TPS takes an all-or-nothing approach to opt-out which means that if only one person in a household enrols, no one who uses that phone can receive marketing calls.

The alternative would give consumers the right to opt out of receiving messages about specific subjects, thus leaving other market sectors free to continue calling. Seven out of ten people think the TPS should be changed to this model. (Only one in ten marketers expected consumers to favour a more specific telephone opt-out service – almost six out of ten expected far fewer to do so.)

With the possibility of this more tailored service in mind, the *fast.*MAP Marketing-GAP Report has been tracking which individual subjects people would opt out of receiving if they had the opportunity.

If the TPS were tailored to market sectors/ companies, which would you register with to stop receiving unwanted marketing calls? Please tick all that apply. Source: *fast.*MAP Marketing-GAP Tracker:	2011 cons %	2011 Mktr %	**2010 cons %**	**2010 Mktr %**	**2009 cons %**	**2009 Mktr %**	**2008 cons %**	**2007 cons %**	**2006 cons %**
Loans/credit cards	**82**	**60**	83	40	89	51	88	86	80
Mortgages	**78**	**54**	80	37	85	-	85	-	-
Gym/ health clubs	**78**	**47**	74	33	81	37	79	74	66
Financial services	**76**	**60**	79	42	85	53	81	79	75
Mobile phones/services	**73**	**53**	74	33	82	45	79	75	76
Insurance	**72**	**62**	78	43	83	53	80	77	73
Utility companies	**71**	**57**	76	32	78	48	73	72	67
Charities	**71**	**53**	71	42	80	44	76	74	64
Broadband /cable /landline	**70**	**58**	73	32	73	49	72	69	60
Banking	**67**	**61**	71	50	71	52	73	67	64
Home improvement/ gardening	**67**	**42**	68	27	71	38	68	63	58
Cars	**67**	**45**	67	41	69	40	74	65	63
IT/ computers	**65**	**48**	62	35	65	38	66	60	53
Mail order catalogues	**64**	**42**	67	35	70	43	66	63	62
Newspaper subscriptions/offers	**63**	**37**	61	22	63	31	57	52	48
Customer magazines	**63**	**44**	66	42	69	37	67	64	58
Health and beauty	**62**	**37**	64	28	72	35	68	63	59
Education/further education	**62**	**38**	64	24	66	33	63	60	52
DVDs	**61**	**41**	59	33	63	35	61	55	52
Holidays	**58**	**35**	60	34	64	37	60	54	51
Books	**55**	**38**	55	38	61	35	61	53	49
Competitions	**51**	**42**	54	35	57	41	51	47	47
Local services/ trades / shops	**50**	**26**	49	17	49	25	50	42	35
Events/entertainment	**50**	**33**	48	20	55	27	49	45	40
Local restaurants/ take-aways	**49**	**29**	45	20	53	25	49	44	40
Supermarkets/ stores	**46**	**31**	44	20	49	25	47	42	38

Increases on last year are highlighted

Hearteningly for telemarketers, for the second year running, the number who would opt out of calls on most subjects has declined.

The exceptions are:

- Four per cent more people would opt out of calls on gyms and health clubs (78%) and local restaurants and take-aways (49%)
- Three per cent more would ban calls about IT and computers (65%)
- Two per cent more don't want calls about newspaper subscriptions ad offers (63%), DVDs (61%), local services, trades and shops (50%) and supermarkets (46%)

However, the problem remains that those market sectors which have traditionally invested most heavily in telemarketing are the ones the majority of people would opt out of. Around eight out of ten do not want to be called about loans and credit cards, 'mortgages', gyms and health clubs and financial services.

More than seven out of ten don't want to hear about mobile phones or services, insurance, utility companies, charities or broadband/ cable/ landline.

The GAP

Marketers' expectations were way off course – though more realistic than last year.

Why people register with the TPS

In 2005, three quarters of consumers selected 'being disturbed in a leisure period' as their main reason for enrolling in the TPS and until 2010, this had remained the primary cause.

But last year, though there was a one percentage point increase on the 2009 figure (to 68%), 71%, cited 'silent calls' which made it the main motivation for opting out of calls.

However, this year, silent calls have dropped to 67% and into third place, while leisure period disturbance leapt by six percentage points to 74% and back into first place – confirmation that the telemarketing industry is successfully addressing the silent calls issue.

Dislike of overseas call centres is now the second most common reason for people to join the TPS – 68%.

Please indicate the reasons why you enrolled in this service? Please tick all of the answers you think apply. *Source fast.MAP/ IPM 2011Marketing-GAP Tracker*	**2011 Consumers %**	**2011 Marketers %**
Being disturbed in leisure period	**74**	**52**
Overseas call centres	**68**	**51**
Silent calls	**67**	**49**
Pre-record messages	**55**	**45**
Foreign accent	**53**	**43**
Hour of the day	**46**	**41**
Disturbed TV programme	**35**	**36**
Just got in from work	**22**	**41**
Bad experience with a company	**17**	**45**
Other, please specify	**9**	**8**

The GAP

Marketers correctly identified the order in which consumers listed their main objections, however they expect more than twice as many adults to specify "just got in from work" and "bad experience with a company" as is actually the case.

Hardly anyone (seven per cent, two percentage points more than last year) patiently listens to marketing messages any more, though four out of ten wait to find out the subject before they hang up, while around the same number hang up straight away.

Demand for Text Preference Service

Overall, since 2006 when the question was first asked, there has been a steady increase in those who would opt out of receiving marketing SMS messages if there was a Text Preference Service similar to the TPS.

Though, there has been some fluctuation over the years - a four percentage point surge in 2009 and subsequent fall-back in 2010.

Five per cent – the same as last year – would not register.

Would you opt out completely if there was a Text Preference Service? Source: *fast.*MAP Marketing-GAP Tracker	**2011 cons %**	**2011 Mktr %**	**2010 cons %**	**2009 cons %**	**2008 cons %**	**2007 cons %**	**2006 cons %**
Yes	**72**	**11**	70	74	70	67	65
No	**5**	-	5	3	5	7	4
Maybe	**22**	-	25	23	24	26	31

The GAP

11% of marketers selected the correct ten percentile.

Almost five out of ten expected demand for enrolment would be higher – a third expected more than 90%.

Coupons and offers

The motivational power of coupons and vouchers
Almost nine out of ten people (88% – up from 86% in 2010) redeem coupons

- 69% occasionally
- 19% regularly

To discover what face value motivates people to redeem a coupon or voucher, consumers are asked whether they would redeem ones of various values.

Until this year, the number tempted by all values of coupons had increased steadily since 2008. (In 2007 the percentages of those who would redeem coupons of all values peaked at levels not seen before or since.)

However, in September, there was a slight decrease in the percentage motivated by a 20p coupon and a five percentage point decrease in those who would redeem a 50p coupon. This was balanced by slight increases in the number motivated by £1 and £5 coupons.

What percentage of consumers do you think nominated the following values as being the lowest they'd bother to redeem? Please tick all that apply. Source. *fast.*MAP Marketing-GAP Tracker	**2011 Cons %**	**2011 Mark. % who got it right**	**2010 Cons %**	**2010 Mark. % who got it right**	**2009 Cons %**	**2008 Cons %**	**2007 Cons %**	**2006 Cons %**
Would you redeem a								
20p coupon	**38**	4	40	8	38	37	49	17
50p coupon	**42**	11	47	13	42	41	57	23
£1 coupon	**54**	9	52	17	44	50	68	29
£5 coupon	**55**	9	52	13	47	51	70	31

The GAP

- 32% of marketers – the largest group – expected only one to ten per cent of consumers to be motivated by a £5 coupon
- 50% expected less than 30% of shoppers to be motivated by a £1 coupon
- 21%– the largest group – expected less than ten per cent to use a 50p coupon
- 58% thought fewer than 20% would bother with a 20p coupon

Marketers continue to misunderstand coupon usage
It would seem logical to expect most shoppers to occasionally use coupons; after all, almost everyone likes a bargain, but the majority of people will use coupons only when they are of specific value to them.

Earlier in this report it was revealed that coupons can be as important in motivating people to open a direct marketing pack as they are in generating redemption. This would indicate that marketers who utilise a lower-value coupon can achieve a higher impact brand message for their money.

Do you redeem coupons or vouchers i.e. money-off vouchers that you might get through the post or via email or through newspapers etc? Source: *fast.*MAP Marketing-GAP Tracker	**2011 cons**	2011 Mkr % got it right	**2010 cons**	2010 Mkr. % got it right	**2009 cons**	2009 Mkr % got it right	**2008 cons**	**2007 cons**	**2006 cons**
Occasionally	69	5	65	3	66	4	65	67	62
Regularly	19	17	21	22	26	12	26	24	26
Never	12	19	14	22	8	16	9	8	12

The GAP
But year after year, the majority of marketers expect only a minority of shoppers to regularly redeem coupons.

In September, eight out of ten marketers thought that less than half of shoppers would occasionally redeem coupons, while only five per cent (a two percentage point improvement on last year's figures) selected the correct 60-70% slot.

Marketers came closer when selecting the percentage which "regularly" and "never" use coupons. Around the same number as selected these percentage bands correctly, selected the ones directly above or below them, illustrating that overall, their expectations were not too wide of the mark.

Almost three quarters never misredeem coupons
Marketers continue to doubt shoppers' honesty when it comes to attempting to use coupons when they have not bought the products specified on them.

There has been a massive leap – from 55% last year to 72% in 2011 – in the percentage of people who never misredeem coupons, yet only seven per cent of marketers correctly selected this ten percentile band. The recent increase in willingness of retailers to prosecute misredeemers should help to further reduce misredemption.

Each year since 2005 (when 49% never misredeemed), shoppers have become increasingly less likely to misredeem coupons.

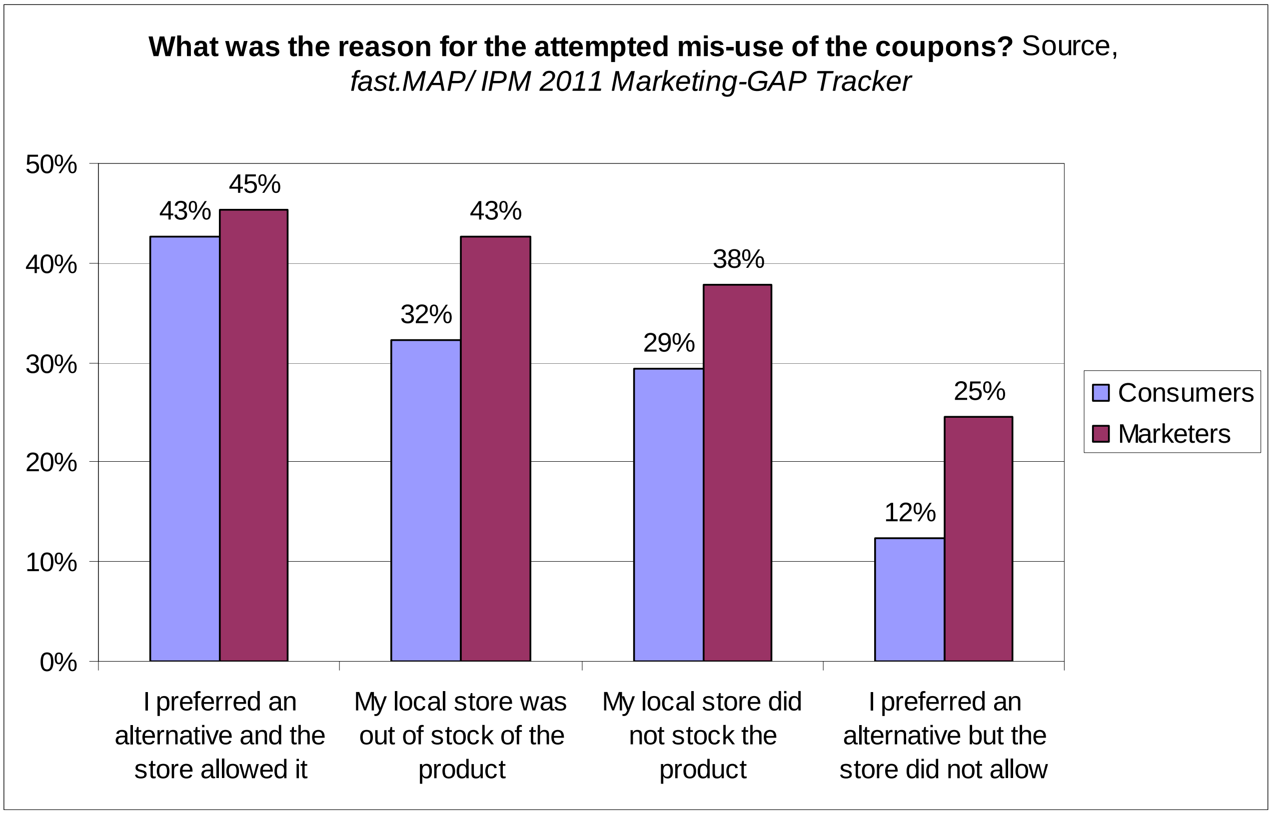
- Only four per cent regularly redeem coupons when they have not bought the products specified on them – down from six per cent in 2010. **The GAP,** 28% of marketers correctly predicted a response within this ten percentile
- 24% occasionally do so – huge reduction from last year's 38%. **The GAP,** 16% of marketers correctly selected the 21-30% slot
- Seven out of ten (72%) never misredeem. **The GAP,** only eight per cent of marketers got this right. Seven out of ten marketers expect less than 40% of shoppers to be so honest.

Do you ever redeem coupons when you have not bought the products specified on them? Source *fast.*MAP Marketing-GAP Tracker	**2011 cons**	2011 Mkr % got it right	**2010 cons**	2010 Mkr. % got it right	**2009 cons**	2009 Mkr % got it right	**2008 cons**	**2007 cons**	**2006 cons**
Never	72	7	55	5	64	4	56	49	49
Occasionally	24	16	38	20	27	20	38	43	42
Regularly	4	27	6	15	-	-	6	8	9

What influences people to misredeem?

NB only the 272 people who in response to the last question said that they misredeemed were asked the following question.

- The majority (61%) of the 24% of shoppers who reported they had tried to misredeem coupons did so because the promoted item was not available in the shop they where in
- The retailer was complicit in allowing les than half of the misredemptions
- 25% of retailers did not allow misredemption



The promotions people have used this year
Almost six out of ten consumers used a reward or loyalty scheme this year.

Marketers were correct in identifying these were the most-used type of promotion, but overestimated the amount they were used by 25%.

Consumers are least likely to have taken part in events at which free or discounted goods are available.

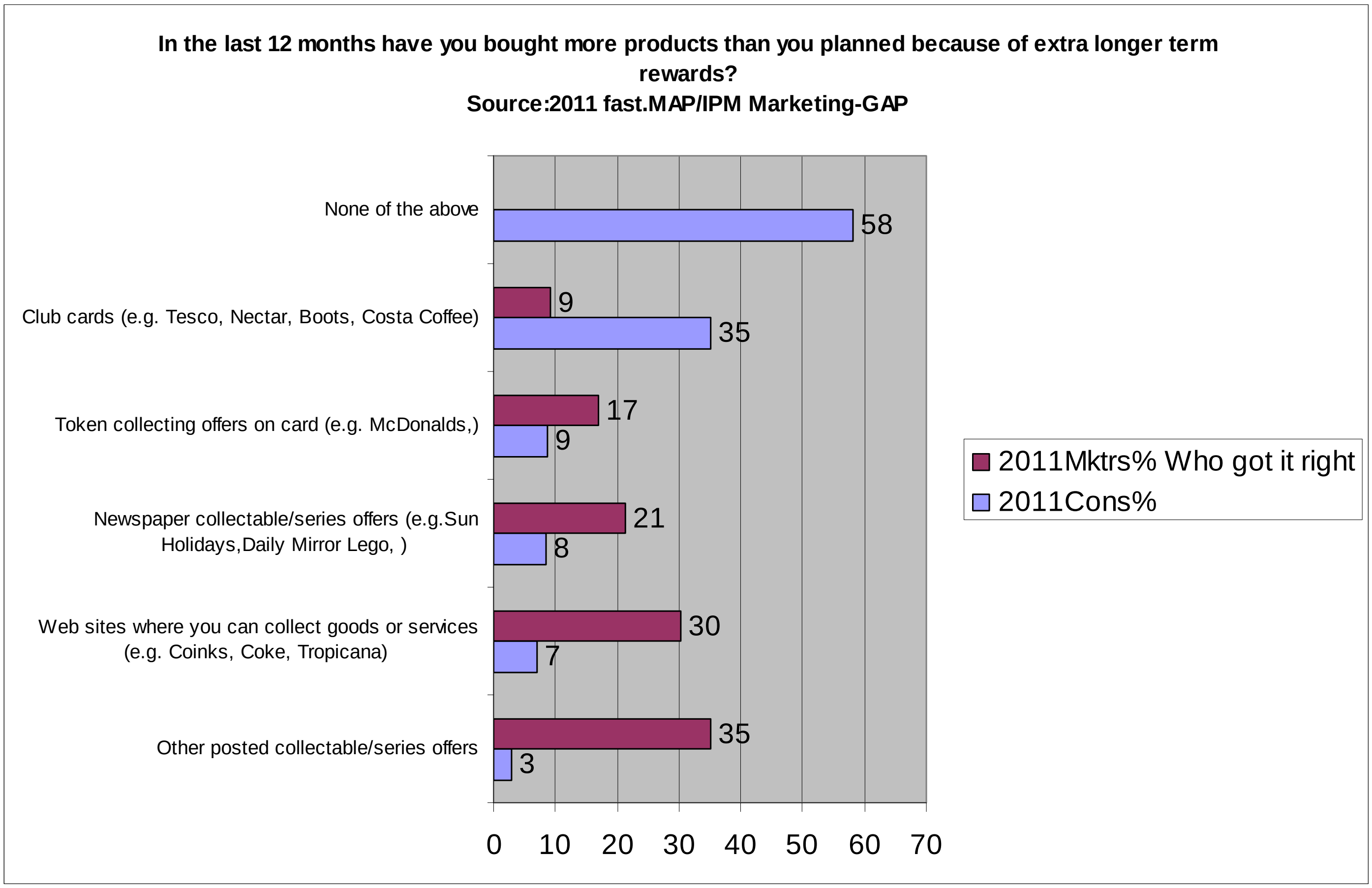
Marketers were most accurate in anticipating the heavy use of loyalty schemes and least accurate in their estimate of use of web Groupon-style couponing and events, where they overestimated consumer the response by 200%.

Have you used these kinds of promotions in the last 12 months? *Source fast.MAP/ IPM 2011Marketing-GAP Tracker*	**2011 Consumers %**	**2011 Marketers %**
Reward or Loyalty schemes (Supermarkets, Newspapers, Collectables such as McDonalds)	57	72
Printing a coupon from the internet i.e. email or website	45	63
Price discounts	44	68
Sampling where you are given or send for a sample	44	64
A coupon from a pack that you have bought	44	68
A printed coupon you received through the post addressed to you	43	63
A printed coupon from elsewhere i.e. magazine or newspaper	39	66
Free Prize Draws where you enter for a chance to win	36	46
Prize Promotions where you enter a competition to win	30	40
A printed coupon dropped through your door or given you in the street or elsewhere	27	54
A coupon website such as Groupon or Living Social	18	53
Gift with purchase or enquiry where you send away for a free gift	16	43
Events that you attend and may be given free or discounted product as well	12	36
None of the above	13	4

Offers that change shopping habits
Club cards such as Tesco, Nectar, Boots and Costa Coffee have tempted 35% of shoppers to qualify for rewards by buying more products than they'd planned – as nine per cent of marketers expected.

Other promotions were only around a quarter as successful in motivating extra product purchase.

40% of respondents took part in loyalty schemes of some kind.

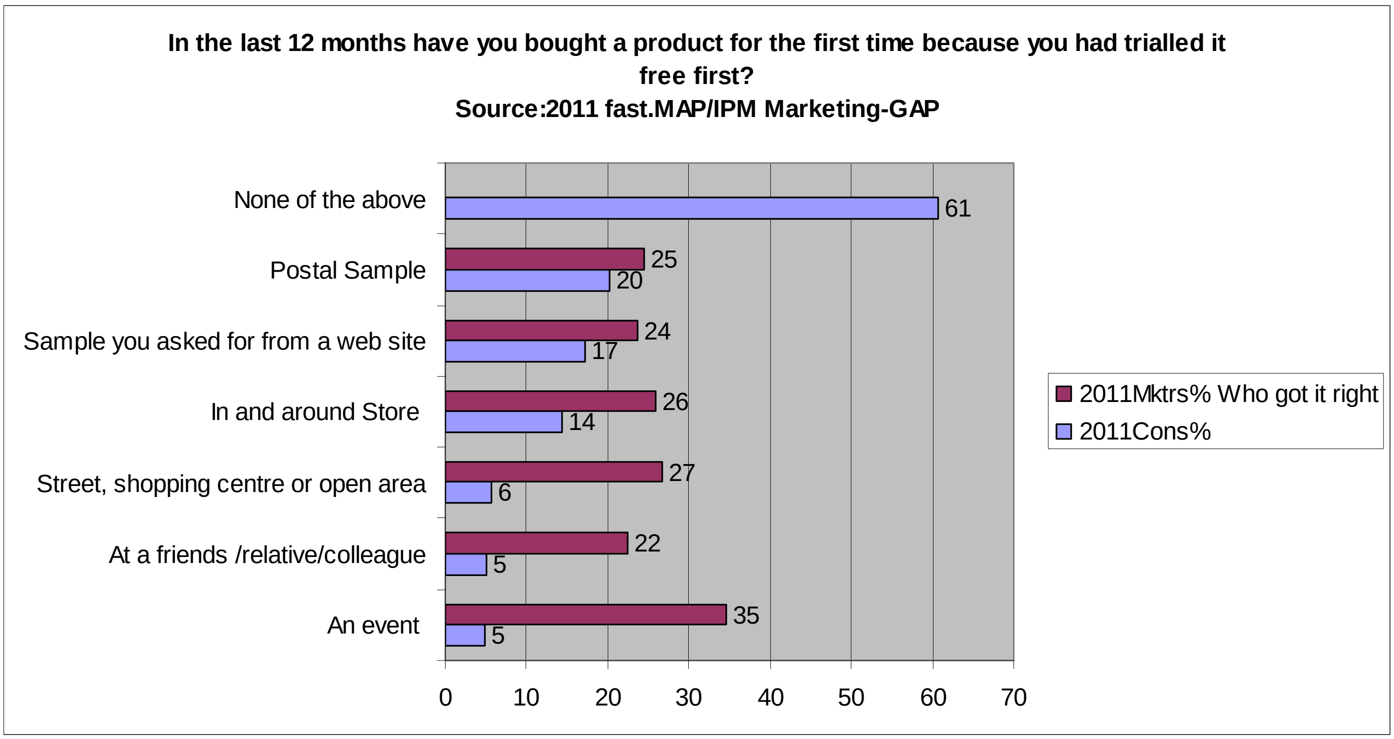


The GAP
Three out of ten marketers correctly judged that fewer than ten per cent of shoppers would be tempted to buy extra both via web sites where goods and services can be collected and using mailed collectables/ series offers.

Sampling the goods
A fifth of consumers went on to buy a product for the first time after trying a postal sample – as a quarter of marketers correctly judged.

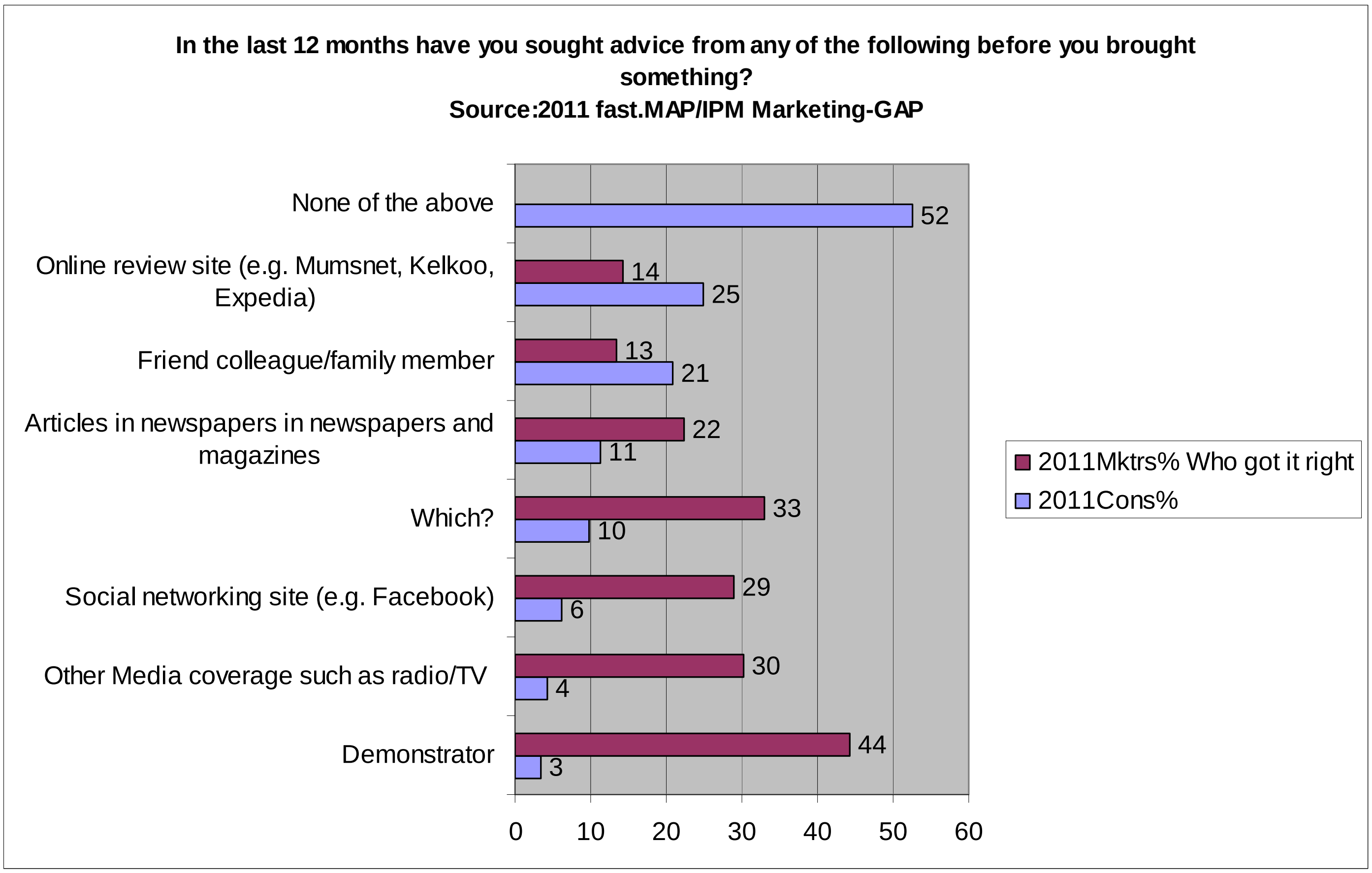
17% bought goods after requesting a sample via a website and 14% after trying something in store.

However, the majority of shoppers (61%) had either not sampled goods in the last 12 months or failed to buy the goods they'd sampled.



Where shoppers go for product advice

- Almost half of shoppers took advice from a variety of sources
- A quarter from an online review site before buying – as 14% of marketers expected
- Two out of ten sought advice from a friend or family member – as 13% of marketers anticipated
- And one in ten turned to newspapers, magazines or *Which*? – as between two and three out of ten marketers correctly identified
- Less than one in ten turned to other advice sources.



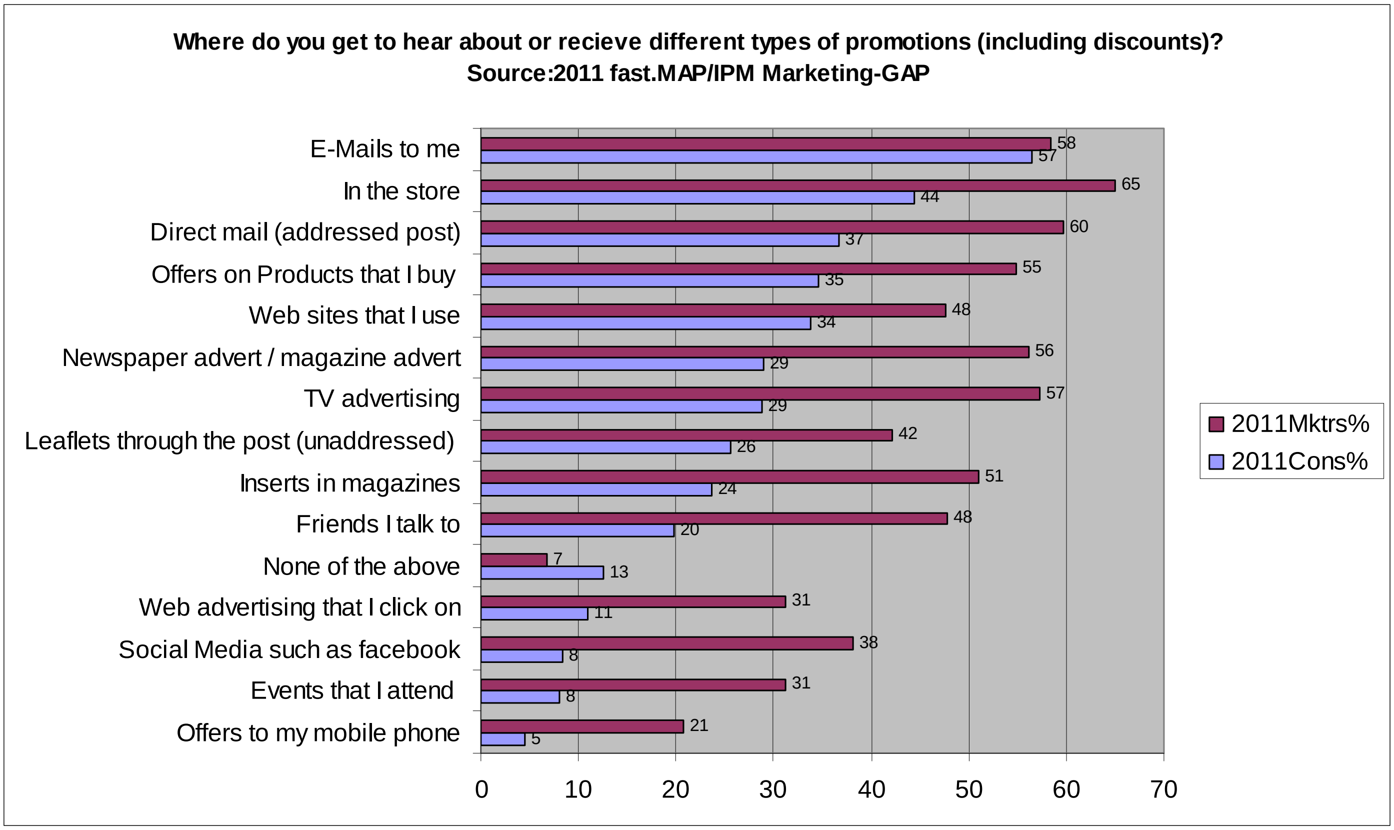
The GAP

Marketers very substantially underestimated the impact of on-line advice – the most regularly-used source of reliable information. They substantially over-estimated the impact of media such as television and social networking.

Consumers rated friends or colleagues as their second most important advice source. Marketers placed these and online review sites as the least important.

Promotions information sources

- People learn about promotions in a wide variety of ways – especially by email (57%) and in store (44%)
- More than a third find out by direct mail, on-pack offers and websites
- Three out of ten via TV, magazine and newspaper ads
- And two out of ten via door-dropped leaflets, magazine inserts and friends



The GAP

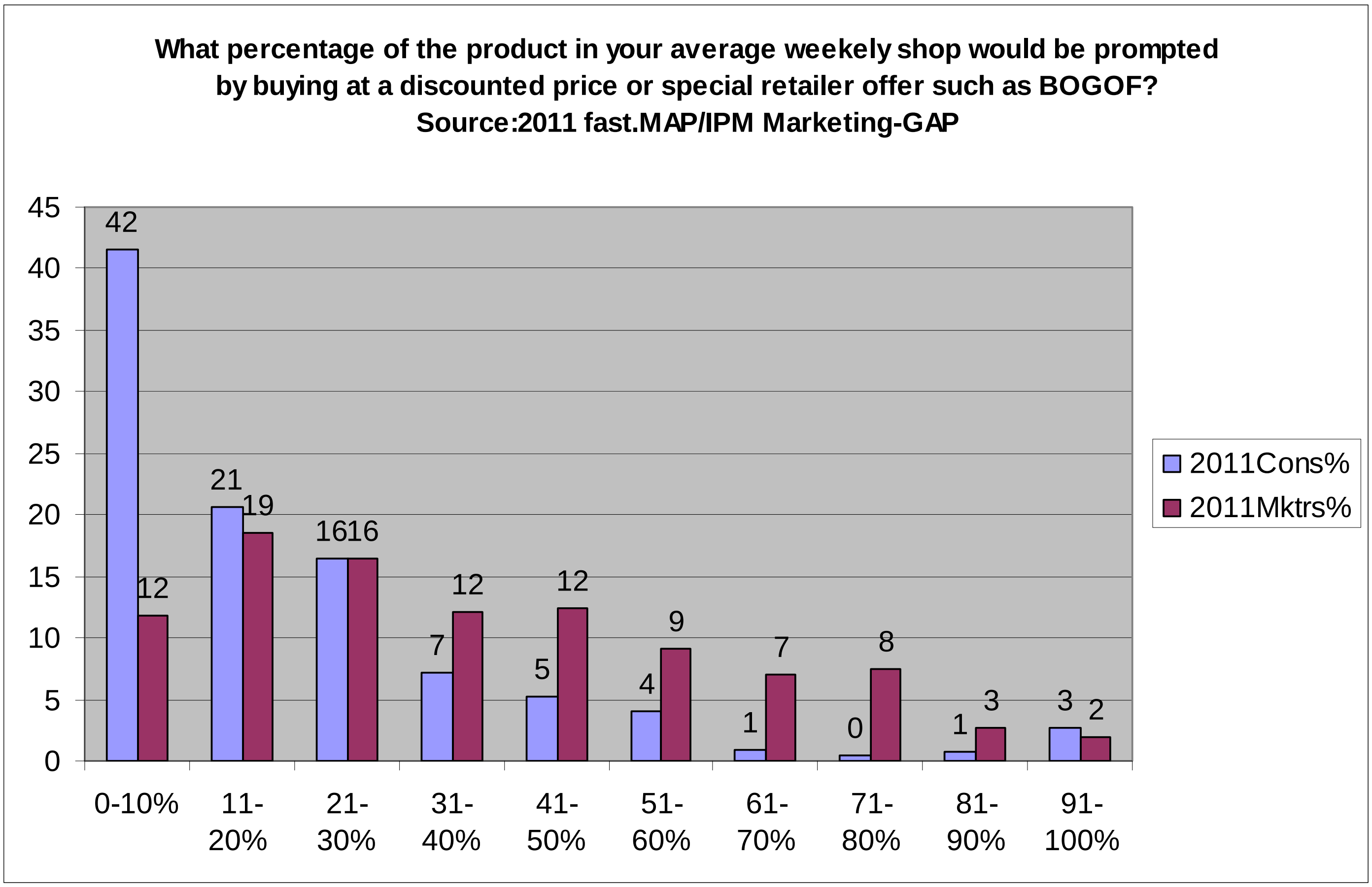
The further down the shopper list you go, the less accurate marketers' estimates become.

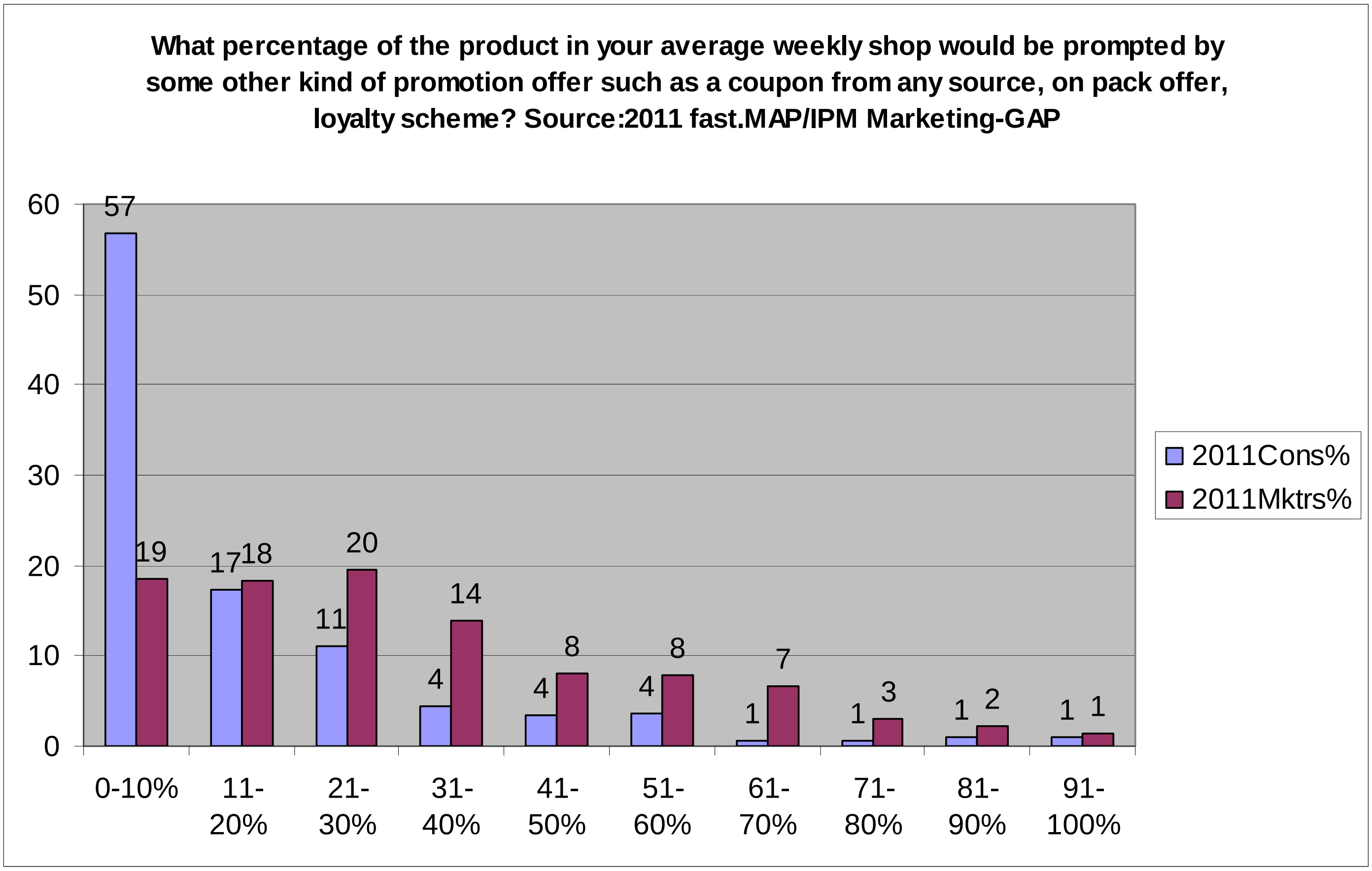
Social media, events and mobile phone are up to 300% overestimated.

Whereas, their judgement about the power or email (top of the shoppers' list, but further down the marketers') was spot on.

Discounts prompt almost a third of weekly purchases
Almost eight out of ten people (79%) are prompted to buy up to 30% of their weekly shop by discount prices and retailer offers.

Slightly more (85%) are prompted to buy up to 30% of their weekly shop by other kinds of promotion.





The GAP for Price and Promotions

The usage profiles for both price and promotions are very similar at the heavy-user end. Though slightly more people are heavy users of promotions than discounts (>41% of the basket).

The difference is more obvious among light users of both types of promotion. An offer on price moved 15% more people into the next usage bracket. Since offers on price typically cost the marketing department more than promotions, this would suggest that promotions could be used instead of price to move low users up.

Marketers underestimated the number of low users and overestimated the number of high users of both discounts and promotions.

Acceptance of SMS and mobile marketing improves slightly
Consumers are more open to receiving marketing text messages than marketing calls to their mobiles.

Seven per cent (up from five per cent in 2010) are happy to receive them from any company and 18% don't object to SMS messages from companies with which they have a relationship.

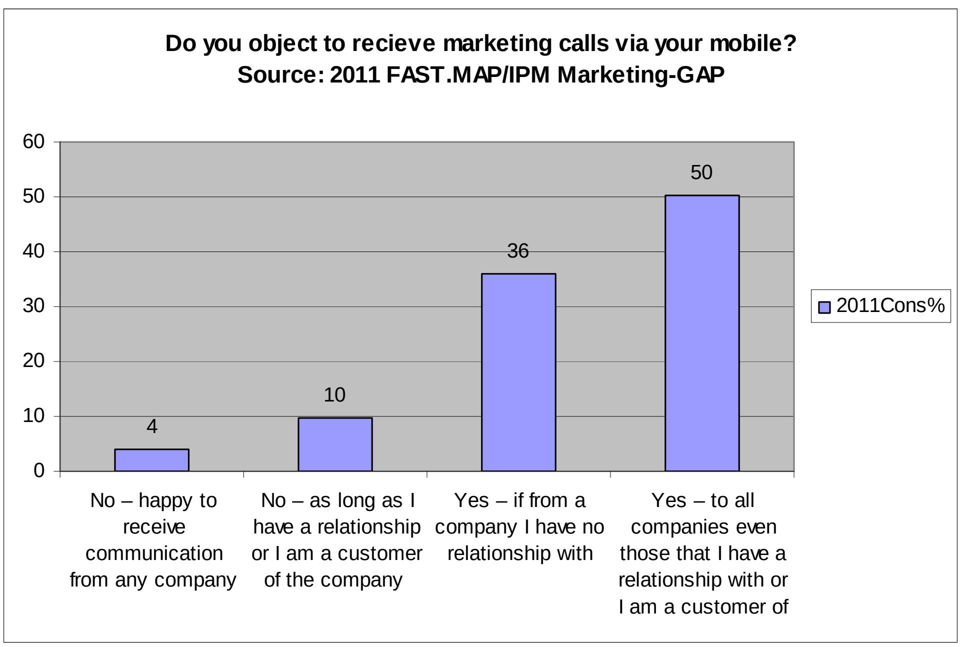
41% (down six percentage points year-on-year) do opt out of receiving texts from all companies and a further 40% (up one percentage point) from companies with which they don't have a relationship.

Only 19% never opt out of receiving texts.

Do you object to receiving text messages from companies? Source, *fast.*MAP Marketing-GAP Tracker	**2011 cons**	**2010 cons**	**2009 cons**	**2008 cons**	**2007 cons**
Object if from company where no relationship	**44**	36	32	30	33
Object to all companies	**31**	48	51	53	48
Don't object – if there is a relationship	**18**	12	13	13	15
Don't object – happy to receive texts from any company	**7**	5	3	4	3

This compares to 14% who don't object to receiving mobile marketing calls – although four per cent of these are only happy to receive calls from companies they use. However, the latter represents a doubling of last year's two per cent, which had remained unchanged since 2007.

And, while there has been a large (13%) year-on-year decrease in those who object to receiving all marketing calls via their mobile – to 50% – there has also been a seven percentage point increase in those who object to calls from companies where no relationship exists, to 36%.



The GAP
Marketers' views are diverse and generally over-optimistic.

Shoppers take a slightly less-dogmatic approach to opt-out
Each year since 2008, people have gradually become more reluctant to share their personal details with companies – especially with third parties.

But this year they are displaying a slightly more relaxed attitude by exercising more discretion about which companies they allow to keep in touch. There has been a decrease in the number who "always" tick the opt-out box, but an increase in those who sometimes do.

Although seven out of ten always tick the box to ban third party contact – this is eight percentage points fewer than last year, while the percentage who sometimes tick it has increased by five to 23%.

Similarly, there has been a five percentage point drop in the number who always ban further contact from the company with which there was initial communication – to 22%, but an increase of three percentage points, to 73%, who sometimes do.

Do you tick the box to stop the company which sent the communication and other third parties from contacting you again? Source *fast.*MAP Marketing-GAP Tracker		**2011 cons.**	**2011 Mkr % got it right**	**2010 cons.**	**2010 Mkr % got it right**	**2009 cons**	**2009 Mkr % got it right**	**2008 cons**	**2008 Mkr % got it right**
Company which sent the communication	Always	22	9	27	28	25	20	18	4
	Sometimes	73	85	70	71	70	69	79	94
	Never	4	6	3	1	4	11	3	1
Third parties	Always	71	27	79	33	77	36	68	38
	Sometimes	23	65	18	63	20	55	30	59
	Never	5	6	3	4	4	10	2	3

This slightly more relaxed attitude is not the result of a corresponding drop in awareness of the opt-out box, almost nine out of ten continue to look for it – only one percentage point less than last year.

In fact, since the first survey in 2005 when 82% always looked for the box, consumer awareness of their data protection rights has remained high – by 2006 it had risen to 86% and then 90% in 2009.

When providing details about yourself do you always look for the opt out boxes so your details are not passed on to a third party or used for marketing purposes? *Source fast.MAP Marketing-GAP Tracker*	**2011-cons. %**	**2011-Mkr % got it right**	**2010 cons. %**	**2010 Mkr % got it right**	**2009 cons. %**	**2009 Mkr % got it right**	**2008 cons. %**	**2008 Mkr % got it right**
Yes	87	5	88	6	90	7	86	9

Similarly, almost everyone is aware of the Data Protection Act (96%) – although 17per don't understand it.

Ever since the inaugural Marketing-GAP questionnaire in 2005, around eight out of ten consumers have understood it and only a tiny minority have not known about it.

Are you aware of the Data Protection Act? *Source fast.MAP Marketing-GAP Tracker*	**2011 cons**	**2011 Mkr % got it right**	**2010 cons**	**2010 Mkr % got it right**	**2009 cons**	**2009 Mkr % got it right**	**2008 cons**	**2008 Mkr % got it right**	**2005 cons**
Yes - understand it	79	9	81	5	79	7	81	6	78
Yes - don't understand it	17	11	16	10	20	11	17	7	19
No	4	33	3	30	1	23	1	17	3

The GAP

However, marketers are almost stubborn in their refusal to acknowledge how savvy people are about their privacy rights.

In fact, marketers' predictions have become steadily less accurate since 2008 – and even then only nine per cent correctly judged that between 80% and 90% of consumers always looked for the box.

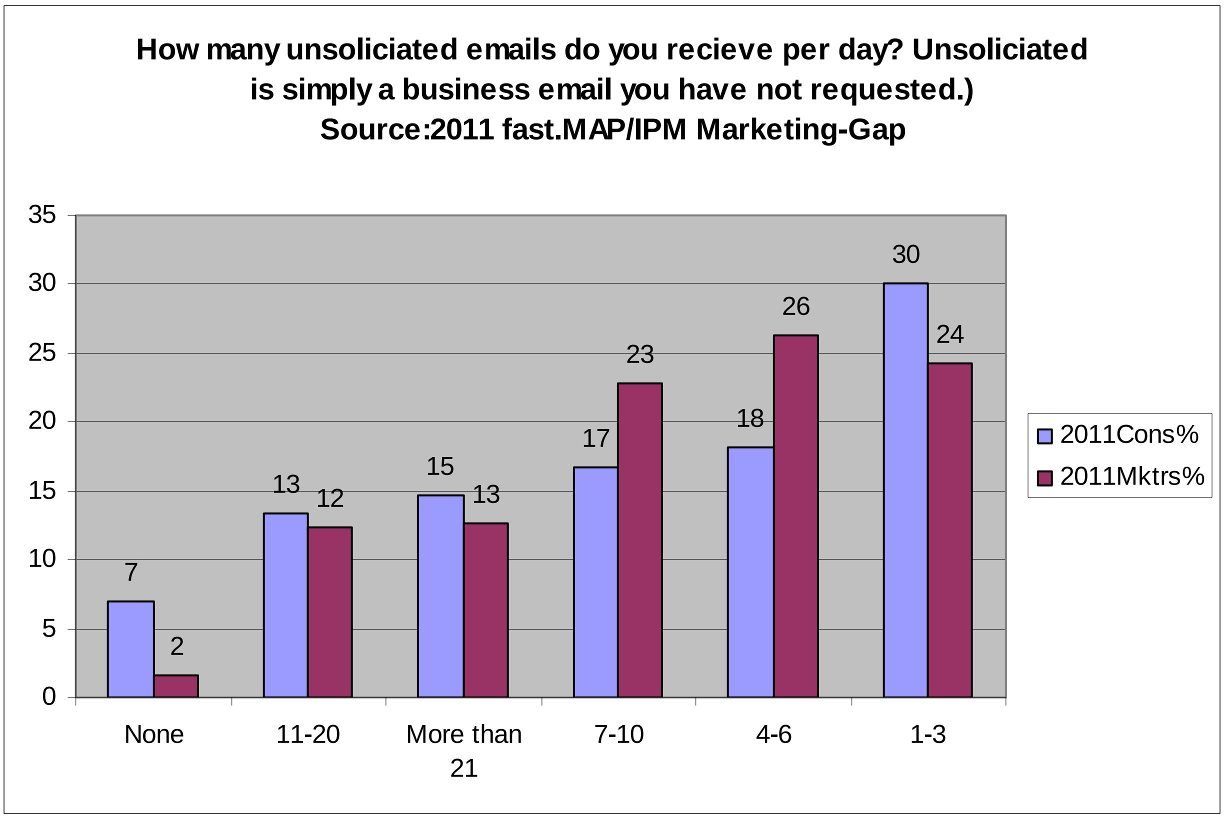
In September, only five per cent accurately selected this correct ten percentile.

(It should be noted that the miss-by-a-mile 2008 judgement mentioned above, represented a nine-fold improvement on 2005 when the question was first posed and only one per cent of marketers selected the correct slot.)

Decrease in spam
Though unsolicited email contact is considered less intrusive than unsolicited landline and mobile contact and 20% (up from 18% last year) prefer to receive their cold marketing information by this route, the spam problem, though decreasing, has not gone away.

15% (down from 21% in 2010) receive more than 21 unsolicited emails a day, while 30% (up from a quarter last year) receive between one and three a day.

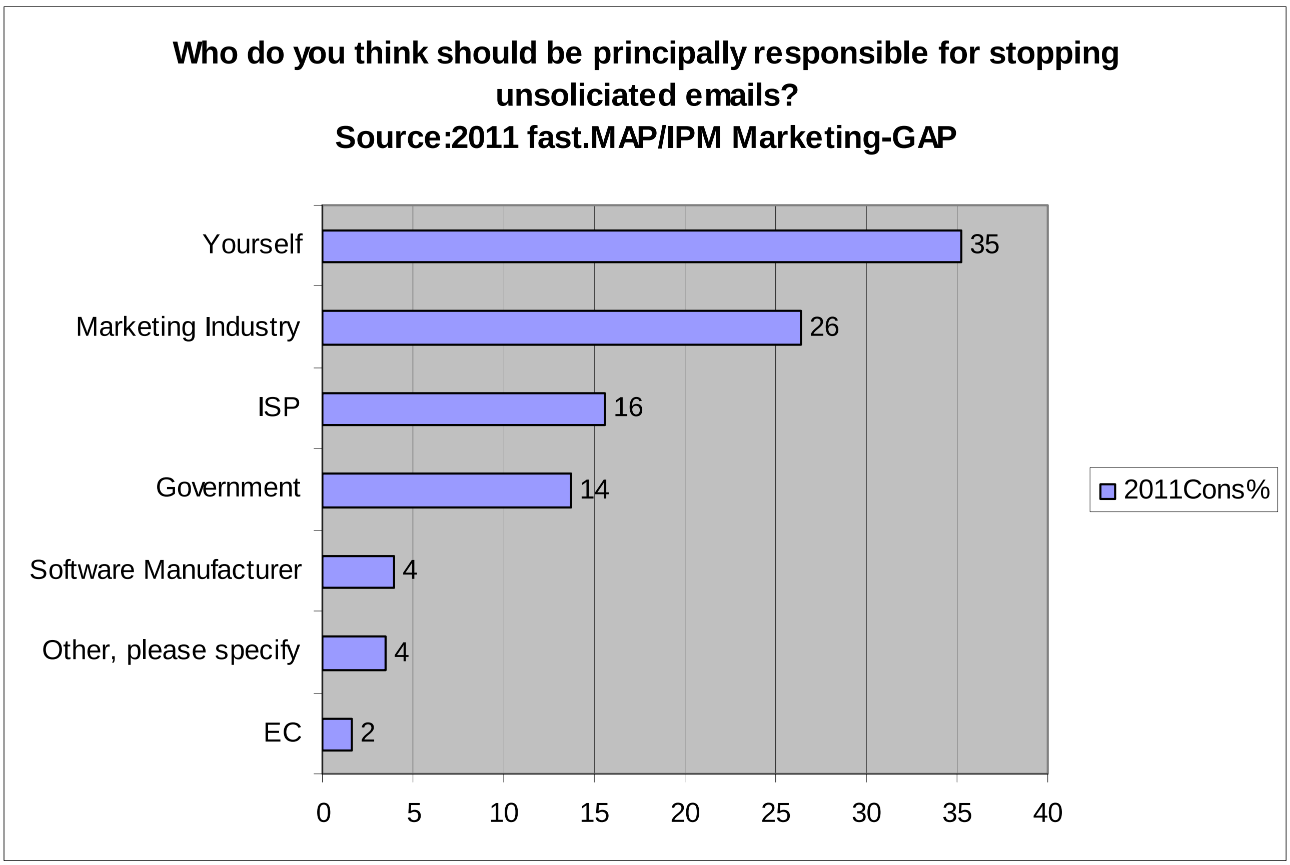
Only seven per cent – a two percentage point improvement on last year – don't receive any.



The GAP
Seven out of ten marketers expect people to receive between one and ten unsolicited emails a day.

Unsurprisingly, three quarters (eight out of ten last year) object to receiving some of this spam – though a third of these (up from 29% in 2010) blame themselves for the level of unsolicited emails they receive.

Do you object to receiving some of these email messages? *Source fast.MAP/ IPM Marketing-GAP Tracker*	**2011 consumers %**	**2011 Marketer % got it right**
Yes	**75**	15
No	**25**	-



Fundraising

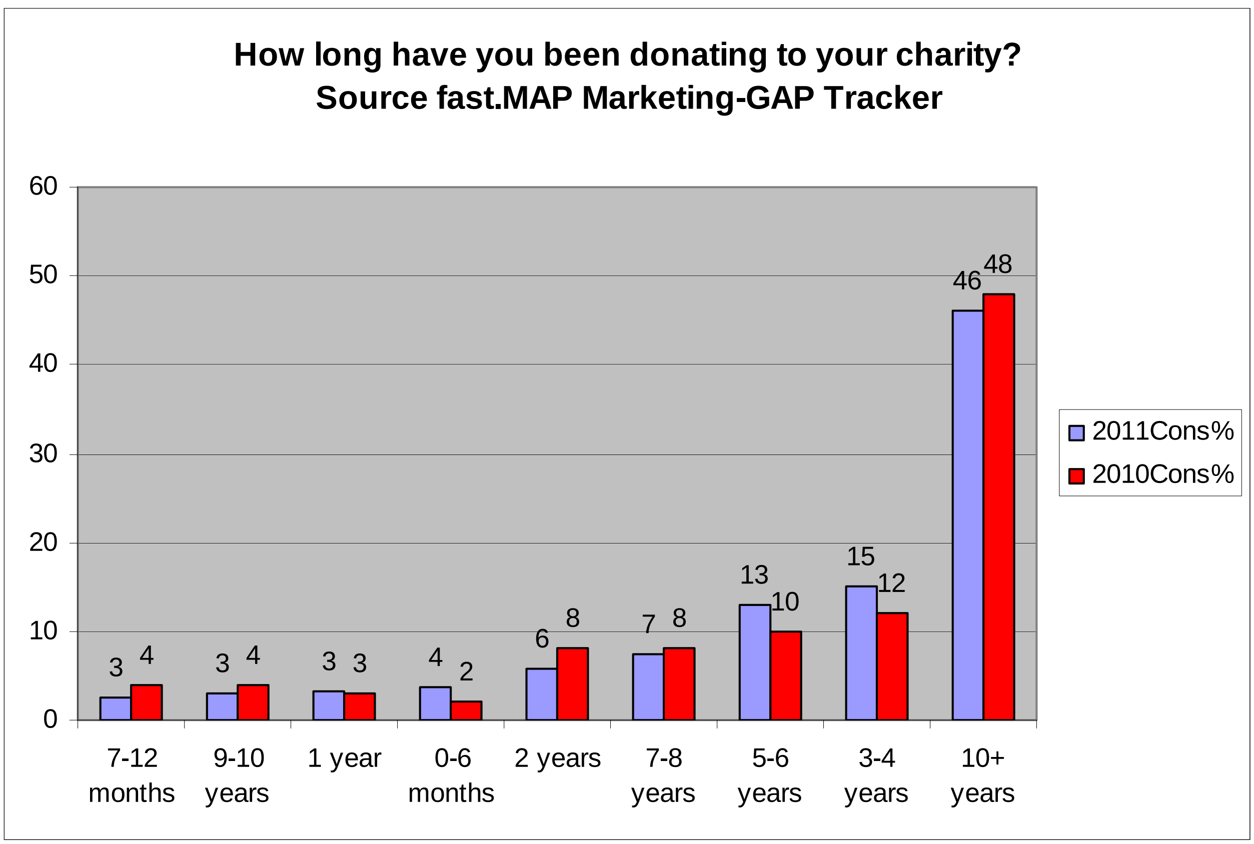
Six out of ten adults donate to charity.

- 44% of them monthly (up from 41% in 2010)
- 42% on an ad-hoc basis (down four percentage points year-on-year)

46% have been donating to their charity for more than ten years (down two percentage points)

- 15% for three to four year (three percentage point increase)
- 13% for five to six years (three percentage point increase)

How often do you donate? *Source fast.MAP Marketing-GAP Tracker*	**2011 cons %**	**2010 cons %**
Monthly	**44**	41
Quarterly	**6**	6
Annually	**7**	7
Ad-hoc	**42**	45



Massive increase in number willing to reveal how much they donate

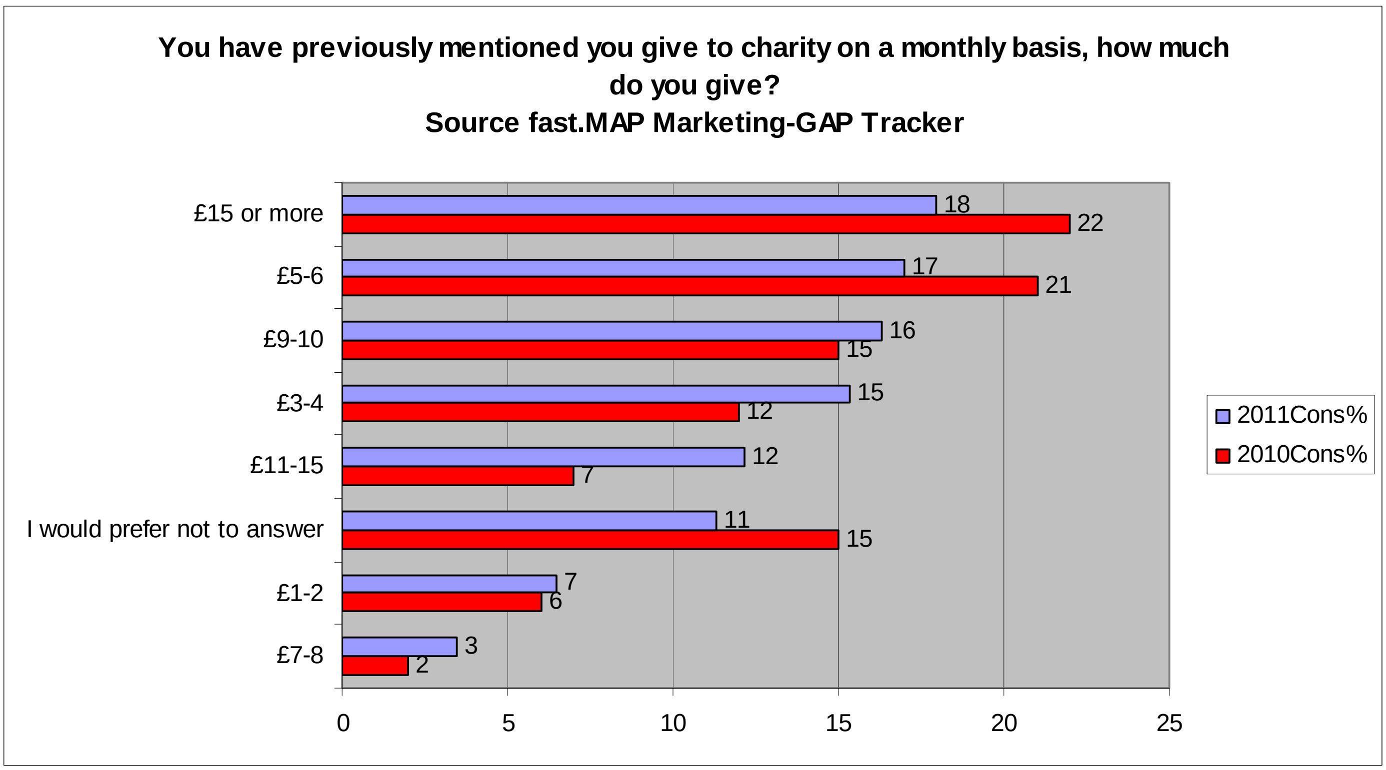
There has been a massive increase in the number of people willing to reveal how much they give to charity.

Last year almost half of quarterly and annual donors preferred not to reveal how much they gave. This year almost nine out of ten revealed the level of their gift, bringing them in line with the more open attitude previously displayed only by monthly donors.

Monthly givers were less coy in the first place. 15% did not reveal their gift level in 2010; by September 2011, this had dropped to 11%.

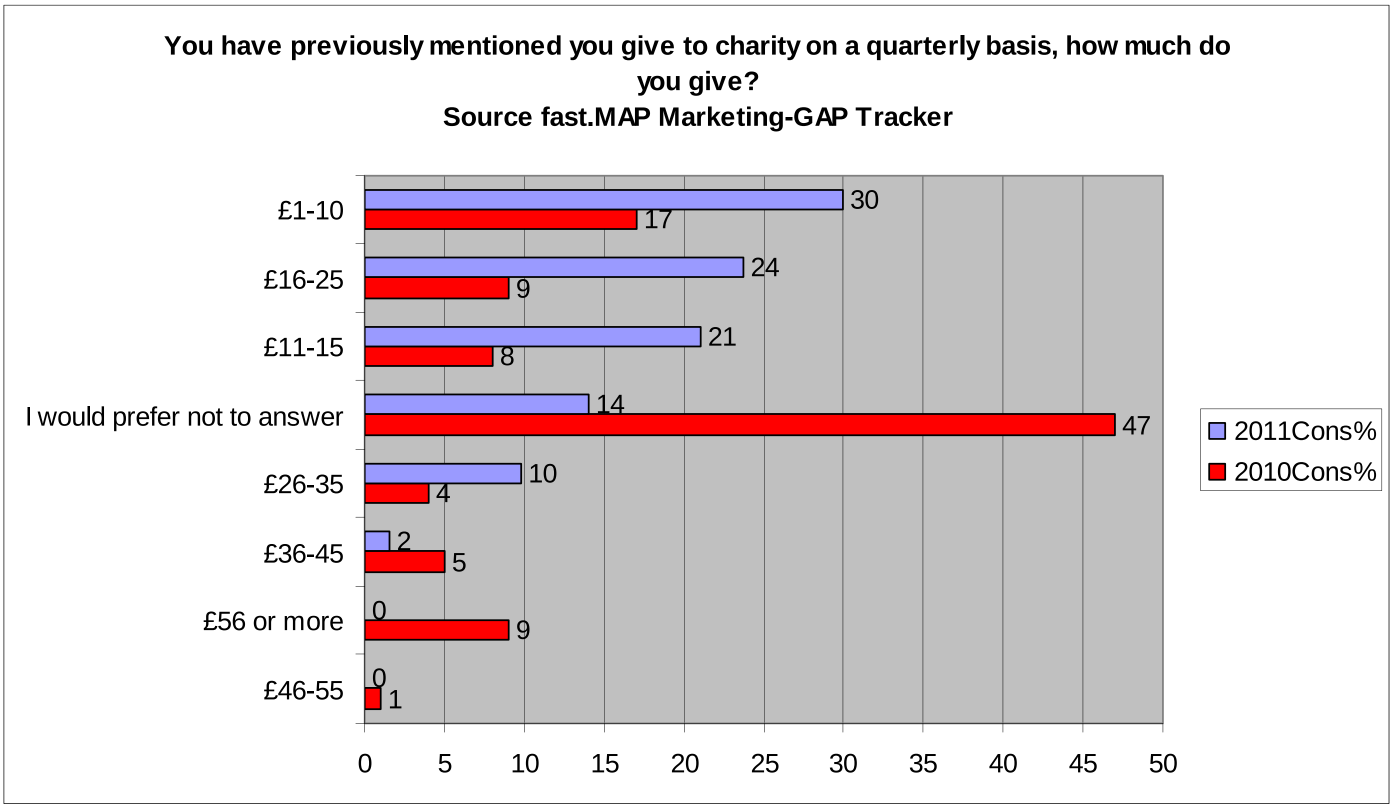
Among monthly donors there was a year-on-year…

- drop of four percentage points in those who give £15 or more and between £5 and £6
- increase in donations at all other levels.
- biggest increase – five percentage points, to 12% – in those giving between £1 and £2.

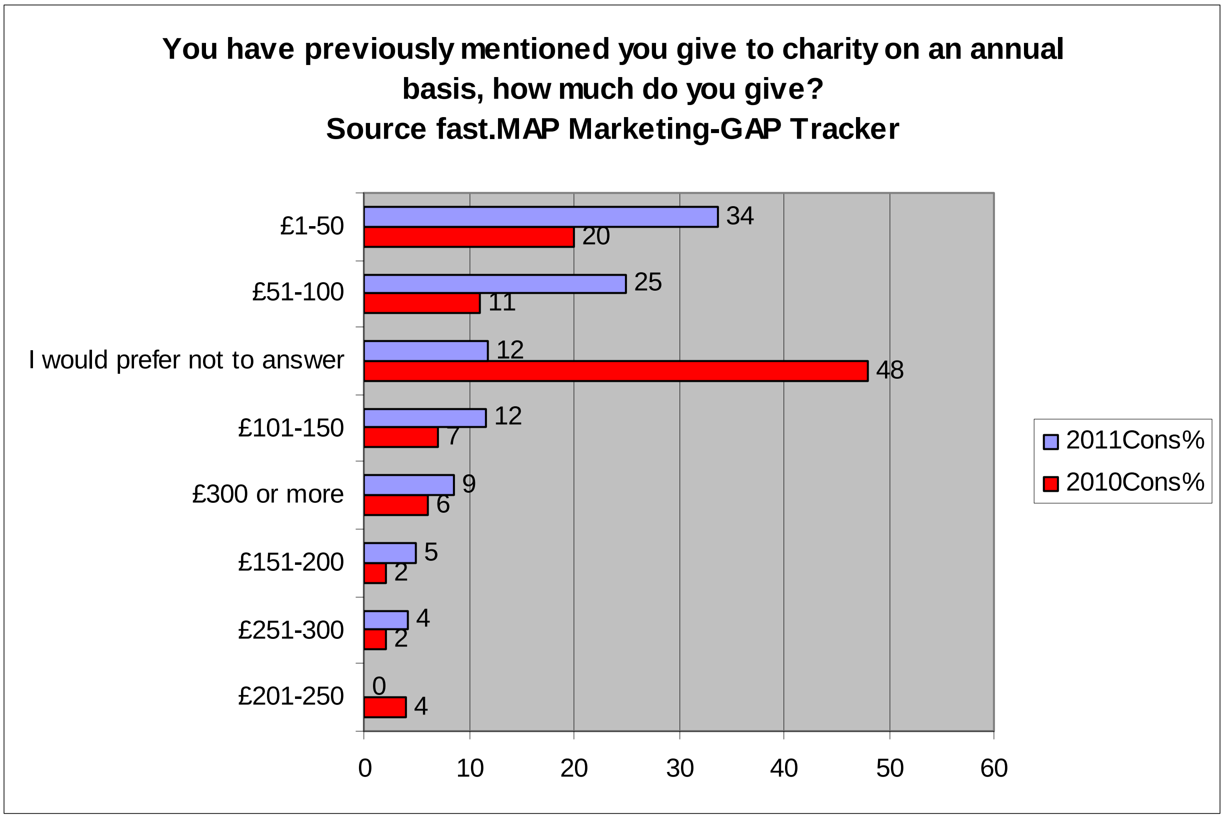


Among quarterly donors the 33% increase since last year in the number revealing how much they give masks year-on-year movements between donation levels. However, it is evident that many of those previously more reticent donors give between £1 and £25, because this is where the largest percentage increases have taken place.

- However, a significant drop in the number giving more than £36-a-quarter is evident
- The percentage giving more than £46 has dropped from one to zero
- Last year nine per cent gave £56 or more – this year, none did.



The number of annual donors who give between £1 and £150 has increased from four to seven out of ten. Since the increase mirrors the drop (from 48% to 12%) in the percentage who last year refused to reveal their gift level, it is logical to assume that it is they who are swelling the numbers in these categories.
However, apart from within the £201 to £250 band (see below), there were also significant increases in the smaller number of donors who give larger amounts.
The exception is that last year, four per cent donated between £201 and £250 annually – this year none did.



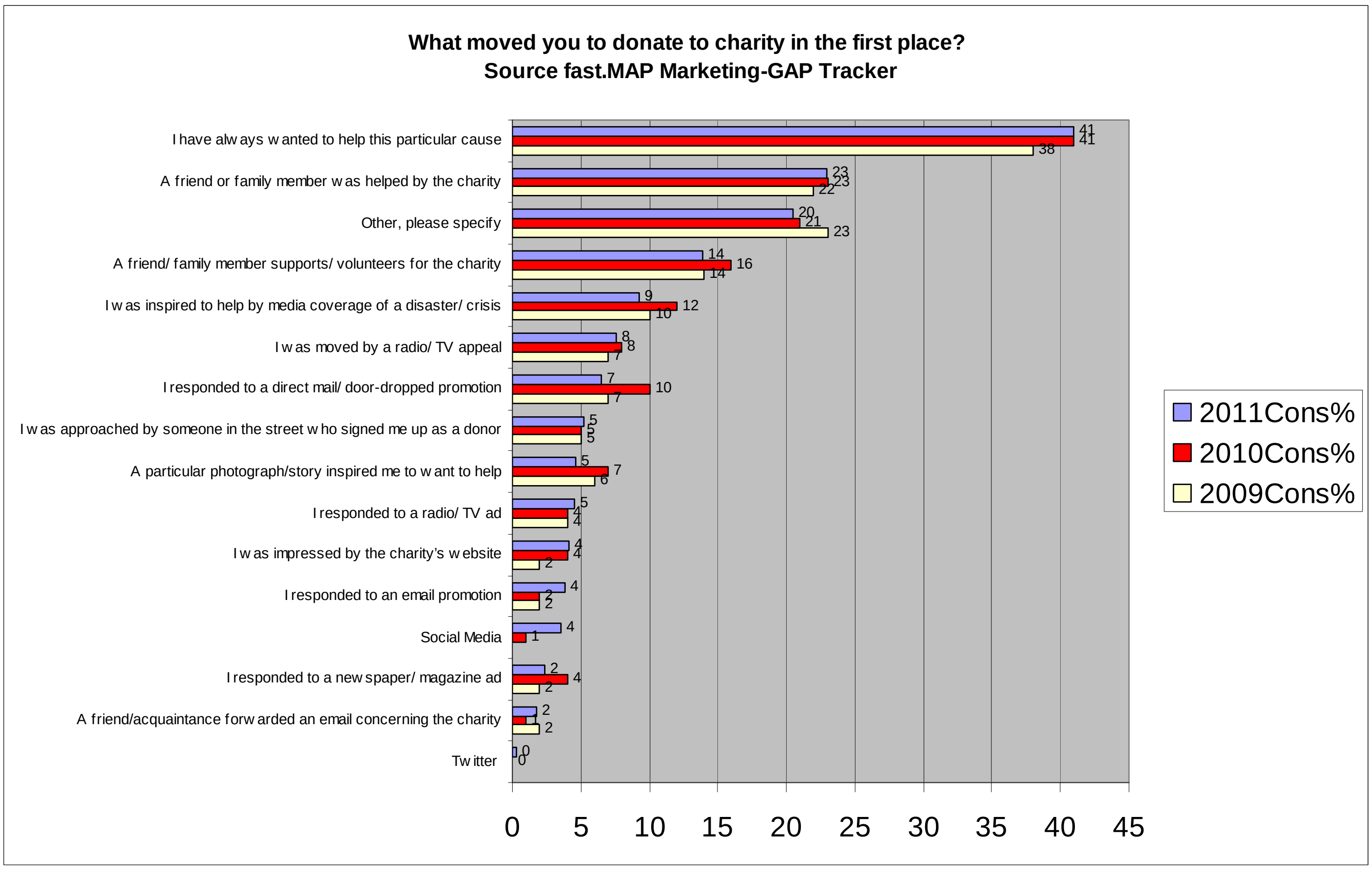
Why people start to donate

The 'What moved you to donate?' question was added in 2009, at the suggestion of *Fundraising* magazine.

After three years it is clear that donors are most likely to start giving for personal reasons rather than in response to appeals and promotions. In fact, the figures are remarkably stable.

41% in both 2011 and 2010 have always wanted to help a particular cause and 23% – up from 22% in 2009 – have a friend or family member who was helped by the charity.

These two, along with the 14% who have a friend or family member who supports the charity, are the reasons why three quarters of donors start giving to charity.



Why donors keep giving
Almost six out of ten (56%, which includes serial one percentage point year-on-year increases since 2009) continue to donate because they believe it's a worthwhile cause; followed by 11% (down one percentage point) who "relate to the cause".

These have remained the main motivations for continued donation since 2005.

Although the second and third most important influences for people to start donating were because friends or relations either worked for or had benefitted from a charity, these are the least influential reasons for staying. This demonstrates that people's motivations change as their support of a charity continues.

Why do you still donate? Source: *fast*.MAP Marketing-GAP Tracker	**2011 Cons %**	**2011 Mktrs %**	**2010 Cons %**	**2010 Mktrs %**	**2009 Cons %**	**2008 Cons %**	**2005 Cons %**
I believe it's a worthwhile cause	**57**	43	56	46	55	53	63
I can relate to the cause	**11**	21	12	11	15	20	14
They need my money	**10**	5	8	3	10	6	6
The charity keeps in regular contact with me and explains how my money helps	**9**	6	8	8	8	6	9
A relative or friend has benefitted from the charity	**6**	17	7	7	6	7	5
I work for the charity or I know someone that does	**4**	5	3	3	3	3	1

The GAP
Marketers correctly identified that "worthwhile cause" and "I can relate to the cause" would be the main reasons why donors continue to support their charity.
But they failed to realise that though people often start giving because they know someone who has benefitted from the charity, this is not one of the main reasons why most continued to donate. Marketers put this in third place.

Why people stopped donating
A third of donors stopped giving to a specific charity in 2011, the same number as in 2009, but three percentage points more than in 2010.

The main reason for these defections (45% in both 2010 and 2011) has remained unchanged since 2005, "couldn't afford it anymore".

- 17% felt it wasn't clear how their money was helping
- 12% decided to support a different charity
- Nine per cent decided another charity was a more worthwhile cause
- Eight per cent felt another charity needed the money more

No one stopped donating because another charity was getting a lot of media attention or because they favoured another charity which had approached them in a more personal way.

Please state the reasons why you stopped giving to a specific charity? Source: *fast*.MAP Marketing-GAP Tracker	**2011 Cons %**	**2010 Cons %**	**2009 Cons %**	**2008 Cons %**	**2005 Cons %**
Couldn't afford it anymore	**45**	45	51	41	36
It wasn't clear to me how my money was helping	**17**	22	15	22	12
I decided to support a different charity sector	**12**	12	12	-	-
Another charity seemed like a more worthwhile cause	**9**	13	12	14	-
Another charity needed my money more.	**8**	8	8	7	17
Lack of communication from the charity that I was donating to.	**6**	8	5	7	5
Because I gave money instead to a recent disaster/ appeal	**4**	1	2	2	1
I moved house and the charity did not contact me	**3**	1	1	1	0
I was moved by the picture on another charity's envelope/mailing	**2**	0	0	0	**-**
Another charity offered a free gift/incentive	**1**	0	0	0	-
A lot of media attention about the cause I decided to support instead	**0**	0	1	2	-
When another charity contacted me, I liked its more personal approach	**0**	0	1	1	-
Other, please specify	**23**	23	20	29	17

Charity telephone contact remains unpopular
Fundraisers have been arguing that when people enrol in the TPS they are not aware that as well as stopping marketing calls this also bans charities from calling them.

Some fundraisers argue that most people would prefer charities to be excluded from the TPS. However, only seven per cent would want charity calls to continue – more than double last year's figure, but still less than one out of ten.

The overwhelming majority of those enrolled with the TPS – 84%, down four percentage points on 2010 – do not want to receive telephone calls about charities.

Even though you are enrolled in the Telephone Preference Service would you be happy for a charity to still be able to contact you if it wasn't against the law. *Source fast.MAP Marketing-GAP Tracker*	**2011 cons %**	**2011 Mkr % got it right**	**2010 cons %**
Yes	7	41	3
No	84	-	88
Don't know	9	-	9

The GAP
Four out of ten marketers correctly identified that fewer than ten per cent of TPS subscribers actually want charity calls.

Only one per cent "happy" to receive landline, mobile or Twitter contact about charities
In response to the opposite question, 'Which subjects are you happy to receive communication about?' only one per cent of consumers (the same as last year) want home telephone calls about charity.

Similarly, one per cent is happy to receive charity information by mobile or Twitter and two per cent via SMS and social media (both one percentage point up on last year).

Direct mail contact remained favourite, with 26%, down four percentage points on 2010; followed by email – 25%, up two percentage points.

The report is downloadable from the *fast.*MAP website, www.fastmap.com **.**

Methodology

Each year, the same questions are asked of similarly-constructed, online consumer and marketer panels.
However, to extend the boundaries of the study and ensure the survey stays abreast of technological advances, over the years some new questions have been added, e.g. as emerging media have moved into the marketing mainstream, for example, Twitter and Social Networks..
Each panel responded to a separate survey.
Both surveys contain the same questions, but while consumers are asked to express their own views, the marketers are asked to use their experience and judgement to predict how the consumers will have respond to that question.

The consumer panel

57 questions were submitted into a *fast*.MAP online self completion survey broadcast during August/ September 2011.The panellists were entered into a prize draw to win £250

- ***Randomisation*** *of images and answer options to avoid top box bias / creative skew*
- ***An acceptable minimum completion time*** *was pre-set and surveys completed more quickly were not included in the results*
- ***Intelligent Routing*** *ensured panel members would experience a high-quality survey experience, because respondents are only presented with relevant questions*
- ***Constant re-qualification*** *of the panel to ensure that background variables are updated. Differences from initial recruitment can result in being removed from the panel*

The consume panel comprised ***1,140 adults*** *recruited from the 30,00 fast.MAP wholly-owned, closed panel whose profile echoes that of the UK's population profile in age and gender.*
Demographic data, collected via online lifestyle survey, made it possibly for only people who are both mail and internet responsive to be selected for the panel.
This pre-existing data also makes it possible for fast.MAP to examine in detail the demographics of a group of people who respond to a question in a specific way. For example, it might choose to investigate their age, sex, income, family or marital status to establish whether there are any significant similarities.
The advantage of the fast.MAP panel – which has been running for more than nine years and has achieved accurate results for marketers within sectors including automotive, charity, finance, catalogue and mail order, telecomm, internet, fast moving consumer goods and medical – is that it is extremely representative of a direct marketing-responsive audience.
It is used by direct marketing, marketing, advertising and sales promotion agencies and brands to gain feedback on marketing, advertising (print/ web/ mail/ video/ radio) or sales activity, e.g. testing different creative treatments, scripts or envelopes; list selection; data planning and purchase and media planning.
Online research offers many benefits. Two of these are overwhelmingly important for the fast.MAP Marketing-GAP study. One is the availability of the wealth of demographic and lifestyle data on panel members, which allows the profiling of cluster groups of those who respond in specific ways. By relating these profiles back to the database, it is possible to identify and quantify the number of other individuals who fit the same profile.
The second benefit is that the research is done in real-time to gain fast, continuous feedback. This means, for example, if people change their views following, say, a Government announcement, a disaster, a product recall, or a rise or fall in the interest rate, it is possible to instantly track this change and factor its effect into the findings.

The marketer research panel

The second panel comprised 350 marketers, drawn from the *fast*.MAP marketing professionals' panel and the IPM's membership.

Validity

When looking at the validity of research findings four things are of prime importance – recency; sample size (that a statistically relevant number of people took part in the survey); whether the respondents form a representative sample; and the manner in which the question is posed.
The representative sample and statistical relevance aspects have been covered above. The research was conducted among a very large sample of ***1,140*** *consumers and is therefore more statistically relevant than similar research done among a smaller sample: The bigger the panel, the more accurate the results.*
Since the order in which multiple choice answers appear can influence response (it has been shown that for some individuals items higher up a list are more likely to be selected than those lower down) the order items appearing on all multiple choice lists was randomly changed throughout the survey, to avoid bias.

Results can also be biased by the way in which responses are collected. A very obvious example would be for a face-to-face interviewer to ask the question: "Do you donate to a charity at least once a month?" Or even worse, for the question to be asked by someone easily identifiable as being connected with a charity, In such cases guilt will become a factor and people are likely to lie to save face, rather than admit they've not given to charity recently.
With an online, anonymous survey, people are more likely to give honest answers to awkward questions.

Recency
One of the greatest benefits of online research is that it takes place in "real time" so that at any moment it is possible to monitor response levels and observe progress. Since answers have been input by the respondents, the delay which occurs because written data has to be entered by a third party is avoided.
Also, it has been shown that data entry errors are less likely to occur when people enter their own responses online. This is partly because a third party may make a data-entry error if they have difficulty in deciphering someone else's writing and partly because if an individual takes the trouble to fill in an online questionnaire, they are likely to enter the data more accurately than a keyboard operator whose attention may wander during monotonous, repetitive data-entry work.
Using face-to-face surveys or paper questionnaires, it would take two or three months to achieve responses to 57 multiple-choice, complex questions from 1,140 people who mirror the UK population profile – because, it would be necessary to first identify individuals with the right demographic profiles and persuade them to participate. Then, either the questionnaires would have to be mailed or delivered or a qualified, nationwide research team would have to be assembled to do the interviews. Responses would be returned to base for input and data processing before results could be presented in a useable form.
The fast.MAP Marketing-GAP Research was carried out in September and statistically-relevant results representing an accurate "snapshot" of topical UK consumer opinion were available within days.

Comparison of marketer and consumer respondent findings
In the marketers' questionnaire it was necessary to collect responses in a slightly different way from the consumer questionnaire. So that one set of findings could be compared with the other, it was necessary to organise responses into class intervals.
For example, if consumers are asked to provide a yes or no response to the question: "When providing details about yourself do you always look for the opt out boxes so your details are not passed on to a third party or used for marketing?" 82% may answer "yes".
The corresponding marketer question would be: "What proportion of consumers do you think always look for the opt-out box when providing details about themselves, so their details are not passed on to a third party or used for marketing purposes?" and their responses may be as follows:

Proportion	*Response*
0 – 10	*7*
11 – 20	*13*
21 – 30	*22*
31 – 40	*16*
41 – 50	*16*
51 – 60	*7*
61 – 70	*13*
71 – 80	*5*
81 – 90	*1*
91 – 100	*0*

The above findings can be reported in several ways, for example, that one per cent of marketers correctly predicted that more than 80% of consumers look for the opt out box, or that 99% of marketers are more optimistic than reality suggests, or that, on average, marketers are over–optimistic in thinking that only 37.5% of consumers opt out compared to a reality of 82%.
If 50% of marketers had underestimated and 50% had overestimated, then the overall assessment of consumer attitudes by marketers would have been correct.

About *fast.*MAP

fast. MAP uses the power, economy and speed of Web testing to help clients to create marketing messages which really sell.

It provides consumer insights which help companies to win new business pitches and pre-tests all formats of marketing creative message – print, direct mail, DRTV, radio or TV – to discover which treatments really work.

David has 25 years of experience in the marketing industry. David has a Business Degree, a CIM diploma and the BDMA Diploma in Direct Marketing. He has worked in marketing agencies, a database bureau and was Head of Database Marketing at The Telegraph Group. Whilst at The Telegraph, David launched the UK's first newspaper reader panel, and went on to co-found CCB providing online research to a wide range of high profile clients. David is widely quoted in the media as pioneering a practical straightforward and cost effective use of online research. David is co-founder and managing director of fast.MAP.

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About the IPM

The Institute of Promotional Marketing represents the interests of brands, agencies and service partners engaged in promotional marketing.

The IPM defines promotional marketing as any marketing initiative, the purpose of which is to create a call to action that has a direct and positive impact on the behaviour of a targeted audience by offering a demonstrable, though not necessarily tangible, benefit.

Promotional marketing is all about using marketing communications to get people to do something. That something could be buying a product or service. It could be giving to a charity or supporting one in some other way. It could be voting for a favourite act. Promotional marketing can even involve getting people to stop doing things – like smoking, for example, or eating unhealthy foods.

Promotional marketing content can be delivered through various channels, including broadcast, print and digital advertising, direct marketing, in-store, experiential, coupons, competitions, value-added and price promotions, and employee and retailer engagement and incentive programmes.

Our services:

- We promote promotional marketing and its benefits to organisations and to the regulatory authorities.
- We run a world-renowned education programme and the UK's leading promotional marketing awards programme, both of which promote best practice and marketing effectiveness.
- We provide a specialist Legal Advisory Service and we promote responsible self-regulation in line with the CAP Codes.
- We have a ground-breaking research programme which analyses the relative value of different promotional techniques in order to help clients and agencies understand the real return on investment.
- We operate a consumer-facing accreditation scheme, the IPM Seal.
- We provide regular social and networking events.

The IPM is a member of the Advertising Association, and works closely with other marketing trade bodies and with the Advertising Standards Authority and the Committee of Advertising Practice to ensure the smooth and efficient running of the self-regulatory system which governs marketing and advertising communications in the UK.

The Institute of Promotional Marketing was originally formed in 1933, and was until May 2010 known as The Institute of Sales Promotion Limited (ISP).

About the Mail Media Centre (MMC)

Mail still has a valuable role to play in campaigns as brands increasingly adopt an integrated approach to marketing. In fact, research has shown that incorporating mail in your campaigns can lift return on investment by up to 20%.

The Mail Media Centre is dedicated to championing the value of mail, demonstrating its effectiveness with the latest case studies, research and insight from industry experts.

By simply registering on the site, www.mmc.co.uk, you can gain access to all this invaluable content. By additionally opting in for the monthly newsletter you'll be kept up to date with the latest industry trends and developments to help you to plan campaigns for maximum impact.

As well as being an online resource you will find a series of events and training held at the Mail Media Centre headquarters in Covent Garden to help keep your skills up to date with new developments in direct mail and multi-channel marketing. At this central location you will also find experts and consultants on hand to help you to make the most of your marketing efforts.

Within this building there is also the Infobank resource which offers free expertise to help you to plan and improve your integrated media campaigns. It provides advertisers and their agencies with a physical place to go for free information when researching their marketing campaign and pitches.

For more information or to book in for any of the above please visit www.mmc.co.uk