DISLOYALTY

FAST AND FICKLE EUROPEAN CONSUMERS ARE...

1 ADDICTED TO NEWISM

Cheating and Flirting with Brands

33% Love trying new things, actively search for the latest brands & products

BRAND BRAND BRAND BRAND BRAND

56% More conventional, preferring to stick with the known, but can be moved to experiment

Consumers are playing the field, looking for new and novel, as the risk of trial nears zero.

Provide frequent, relevant refreshes & new, unique choices to keep consumers attached to your brand.

2 MULTIPLYING THEIR BRAND LIAISONS

Considering & Admitting More Brands Into Their Repertoires

Consumers are aware and engaged with broader competitive sets.

Identify how consumers rank and stack attraction attributes, to get onto their radar and into their basket.

40% More likely to try new or different brands than 5 years ago

29% Choose across more brands, but prefer to stay with those they've tried before

Active Explorers

Conscious Considerers

3 LESS ROOTED IN THE RECOGNIZED

Loosening the Ties With Those They Trust

12%

Firm loyalists (11,6%) are a minority, preferring not to take risks and seldom buy new products.

Over a quarter (27,5%) are stuck in the past or **lazy loyalists**, buying the same as before and staying with their favorites.

Consumers are less likely to be lured by brand halos.

Retention, extension and innovation propositions must be compelling beyond the rare loyalists, to maximise gains from new, experimenting consumers.

4 PREJUDICED BY PRICE

But It's Not Just About the Money

CHOICE DRIVERS

hold great sway in tempting consumers to try or switch

35% **Value for Money**

29% **Price/Promo**

SUCCESS DRIVERS

are significant physical features shaping selection behavior

22% **Superior Quality/ Function**

22% **Ease/ Convenience**

LONGER TERM, TANGIBLE TRAITS WILL KEEP CONSUMERS CONTENT

Consumers are enticed by price, but more likely to commit for the tangibles.

Quantify how physical product properties (quality, function, convenience) outweigh purely price.

5 DUBIOUS ABOUT BRAND POWER

But Expect Brands to Have Better Presence and Purpose

Heritage and recognition still provide slight advantages.

Define your brand's relevance in the context of solving consumers' needs, and role within the larger environment.

17%

The strength of large, well known and trusted brands holds strong for consumers, who are drawn to offerings from those they are familiar with, and have established confidence.

14%

Intangible product purpose, those that are socially responsible (12%) and trading with transparency (16%) will be successful in resonating with consumers.

6 SCREEN SURFERS AND SHOPPERS

Choosing Brands Because They're Accessible

12% enticed by brands available for purchase online, a clear sign that digital touchpoints and places are coaxing consumers to try and buy.

Consumers are racing towards ease and automation.

Combine omni-channel information discovery, to enrich physical shopping paths, and incorporate seamless digital purchase connections.

7 LEANING TO LOCAL

Nationalists - Homegrown Is Important, for Some

7% of consumers are deeply devoted, only buying local products.

49% mostly buy local but will consider those from other countries as well.

TOP FIVE MARKETS ONLY BUYING LOCAL

Italy	14.8%
Serbia	13.9%
Greece	10.0%
Bulgaria	10.0%
Turkey	10.0%

Consumers assess products based on origin.

Leverage local origin sourcing and taste preferences as an advantage in relevant categories & countries.

8 MANIPULATED BY MEDIA AND MESSENGERS

Influenced by Advocacy, Together With Advertising

16% Brands with earned presence via recommendation (17%) and reviews (15%) have the ability to prompt disloyal actions.

7% Marketing investments (TV, radio, print, OOH, online/mobile) and store activation, in isolation, will prove to be less persuasive.

Consumers value independent opinion, but advertising is still the start of the 'reach' journey, prompting follow up action.

Open your brand to social engagement & interaction, invite feedback. Multi-layered trust building tactics are vital.