

The UK

Mover

Suppression Market

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1. The UK Suppression Market

There are a number of companies in the UK who specialise in gathering and publishing details of consumer and business movers in the form of suppression products. This data comes from a variety of sources and the method by which the data is gathered determines not only the level of accuracy but also the speed by which the information is made available for suppression purposes.

These suppression products are usually licensed and used by processing bureaux who provide a suppression screening service to end clients wishing to identify movers on their databases.

Many larger organisations, with in-house processing facilities, will license these products directly from the supplier for use in house rather than outsourcing suppression screening to a 3rd party.

1.1. Data Sources

Postal re-directions

The Royal Mail operates postal re-direction services for consumers and businesses that are moving. The data captured as part of the re-direction service is also used to create the National Change of Address (NCOA) and Business Changes File (BFC) gone away suppression files.

Returned Mail

Returned mail falls into 2 categories. The first is where mail is returned, by the recipient, usually marked with phrases such as “not known at this address” or “moved”.

The second is where the Royal Mail has returned the item with a sticker applied giving various options such as “addressee has gone-away”.

This source of mover data is assumed and cannot be guaranteed to be 100% accurate. It is not uncommon for consumers or businesses to return items marked as “not known at this address” simply to remove themselves from marketing lists or to avoid being chased for payment of debts.

Self Identified Movers

When a consumer or a business knows they are about to move they will usually inform organizations with whom they transact –e.g. banks, utility providers, catalogue companies etc.

Some of these organizations will make this information available to 3rd parties in the form of a suppression file – e.g. the address that their customer is moving from.

Transactional Based Information

This is similar to the self identified movers above but is mainly based on credit information and Electoral Roll changes. The accuracy of this data is quite high, being slightly more accurate than the self identified movers data mentioned above although there is still room for information to be supplied as a gone away when in fact this is not the case.

Predominantly this data will be collated and published by credit bureaux that have exclusive access to this type of data which can be used for suppression purposes and not marketing in any form.

1.2. Suppliers

There are 6 major suppliers of consumer and business mover suppression data in the UK:-

- Royal Mail
- The REaD Group
- Experian
- Equifax
- Acxiom
- Direct Marketing Association

Royal Mail

The Royal Mail operates 3 mover suppression products:-

- National Change of Address (NCOA)
- Business Changes File (BCF)
- Universal Suppression Service (USS)

As discussed above the NCOA and BCF files are created using information provided when a consumer or business relocates.

The Universal Suppression Service combines information from qualified postal returns from a pool of data contributors and address change information from notifications provided to Royal Mail by customers. It is an amalgamation of the NCOA file (confirmed movers) and postal returns (assumed movers).

Users of this suppression product can select the type of suppression they wish to screen against (confirmed or assumed movers).

The REaD Group

The REaD Group started gathering and publishing suppression data products in 1992 (movers and deceased suppressions) and quickly became the largest supplier of suppression data in the UK.

Their products are used by many businesses and their mover suppression products (listed below) have grown in volume since inception. Their products are:-

- Goneaway Suppression File (GAS)
- Business Suppression File (BSC)

The GAS file is based on credit change information sourced via a company called CallCredit. CallCredit are one of 3 licensed credit bureau in the UK and work in conjunction with their sister company – EuroDirect (both owned by The Skipton Group) – to generate the data which feeds into the GAS file.

The Business Suppression File combines data identified from Dunn & Bradstreet's complete UK business file, the REaD Group's consumer and SoHo data and a historic closed archive file derived from the OSIS data, to create a database of over 6 million companies and individuals.

These data sources allow every UK company change, including SoHos and sole traders, to be logged and added to the file. The Business Suppression File supplies information on out-of-business companies, company relocations, changes of employees, SoHo relocations, unmarketable data and employee deaths.

Experian

Experian are one of the largest data organization in the UK who specialize in all data related products and a range of services assisting companies looking to maximize the performance and understanding of their marketing information. They are also one of 3 licensed credit bureau in the UK.

Their suppression products are:-

- **Absolute Movers**
- **Experian Suppression File**

Absolute Movers is based almost entirely on changes to credit information and until recently was only available via Experian.

The **Experian Suppression File** contains gone-aways received from the Experian survey mailing program and their commercial partners. This file is created from approximately 15 million annually returned surveys. The returns are separated into three categories: No direct mail request, Gone-aways, Deceased. The file is updated as new survey data is collected.

Equifax

Equifax are similar to Experian and are also a licensed credit bureau.

Their **disConnect** suppression product is also based on credit information and they claim to have up to 50% unique movers in comparison to any other mover suppression product.

Acxiom

Acxiom are an organization who collect data on consumers via lifestyle surveys and research programmes.

Their suppression product is called **Purity** and is updated quarterly using Acxiom's 20 year long data collection program. The file has deliberately excluded any postal returns to prevent over suppression and 'false' identification of movers.

Direct Marketing Association (DMA)

The DMA are the body which represents the interests of the UK direct marketing industry and is dedicated to the protection and development of the UK direct marketing industry. They lobby against adverse legislation from government and other regulatory bodies, and promote the expansion of national and international markets.

They also promote best practice and raise industry standards through the DM Code of Practice, best practice guidelines and the DMA Awards, and provide up-to-the minute information, research and legal advice.

The DMA's suppression product is called **Xpression** and is created using data compiled through electoral role changes, notifications and postal returns. The file currently contains in excess of 21 million records and has no data older than 24 months. The data is supplied by a consortium of companies Claritas, Royal Mail, The Read Group and Tri-Direct.

1.3. Summary of Competitor Products

The table below highlights the strengths and weaknesses of each suppression product.

Competitor	Residential Product Name	Strengths	Weaknesses
Royal Mail	NCOA	100% accurate Can provide new address for some of the movers	<ul style="list-style-type: none"> Only captures circa 50% of all movers each year Updated monthly
Royal Mail	USS	Amalgamation of several products	<ul style="list-style-type: none"> Some assumed mover Mover information can take 6 months to be added to the product Updated monthly
REaD Group	GAS	Brand leader in the mover suppression market	<ul style="list-style-type: none"> Only captures credit active movers Updated monthly
Experian	Absolute Movers	Accurate file	<ul style="list-style-type: none"> Can only be used by Experian customers Captures only credit active consumers Updated monthly
Experian	Experian Suppression File		<ul style="list-style-type: none"> Survey based movers Updated infrequently
Equifax	disConnect	Can provide new address for some of the movers	<ul style="list-style-type: none"> Captures only credit active consumers Updated monthly
Acxiom	Purity	Claims to be highly accurate	<ul style="list-style-type: none"> Based on lifestyle surveys which may or may not be 100% accurate
DMA	Xpression	20% discount for DMA members	<ul style="list-style-type: none"> A combined file which has a mix of confirmed and assumed movers data

Competitor	B2B Product Name	Strengths	Weaknesses
REaD Group	BSF	1 of only 2 business mover suppression products in the market	<ul style="list-style-type: none"> Updated monthly Not all data is 100% confirmed movers
Royal Mail	BCF	100% accurate & 1 of only 2 business mover suppression products in the market	<ul style="list-style-type: none"> Only captures circa 70% of all business movers each year Updated monthly

1.4. Conclusions

The Direct Marketing industry is continually being advised to ‘clean up it’s act’ with regards to suppressions and whilst this is absolutely the right thing to do we can fully understand why many businesses do not feel in a position to do so with any degree of confidence.

In our opinion there are too many gone away suppression products for businesses to choose from and unfortunately none of these products provide a complete solution to address the issue of suppressing gone aways.

The cost of using these products is often prohibitive particularly when many businesses consider that the information contained within the suppression files is not wholly accurate to begin with.

Of most concern is the degree to which inaccurate or assumed data is being offered as a solution to suppress gone aways. This is simply not good enough in our view and from experience many of our clients no longer trust some of the more established suppression products as a result.

It is clear that a shake up of the suppression market is well overdue. Some businesses who create suppression files are falling into the same trap as the data broking industry has done for far too long now and pushed quantity over quality. It's easy to understand why – the more records they have on their files the more money they make.

What the Direct Marketing industry really needs is a single source of gone away suppression information that covers 100% of all gone aways, is updated regularly, contains accurate information and is cost effective for all to use.

If the Direct Marketing industry wants its members to take the issue of suppression seriously it must push for a comprehensive, reliable and cost effective solution? There is plenty of work to be done to regain the confidence of those who need to use suppression products the most.

By the way, it is worth mentioning that The Ark are working with a partner to bring to the market a single gone away suppression product which will cover 97% of the UK, using only 100% transactional data, made available the day following a move – watch this space.