

2014 Consumer Engagement Study



FLYER DISTRIBUTION
STANDARDS ASSOCIATION

www.fdsa-canada.org

Flyer Distribution in Canada

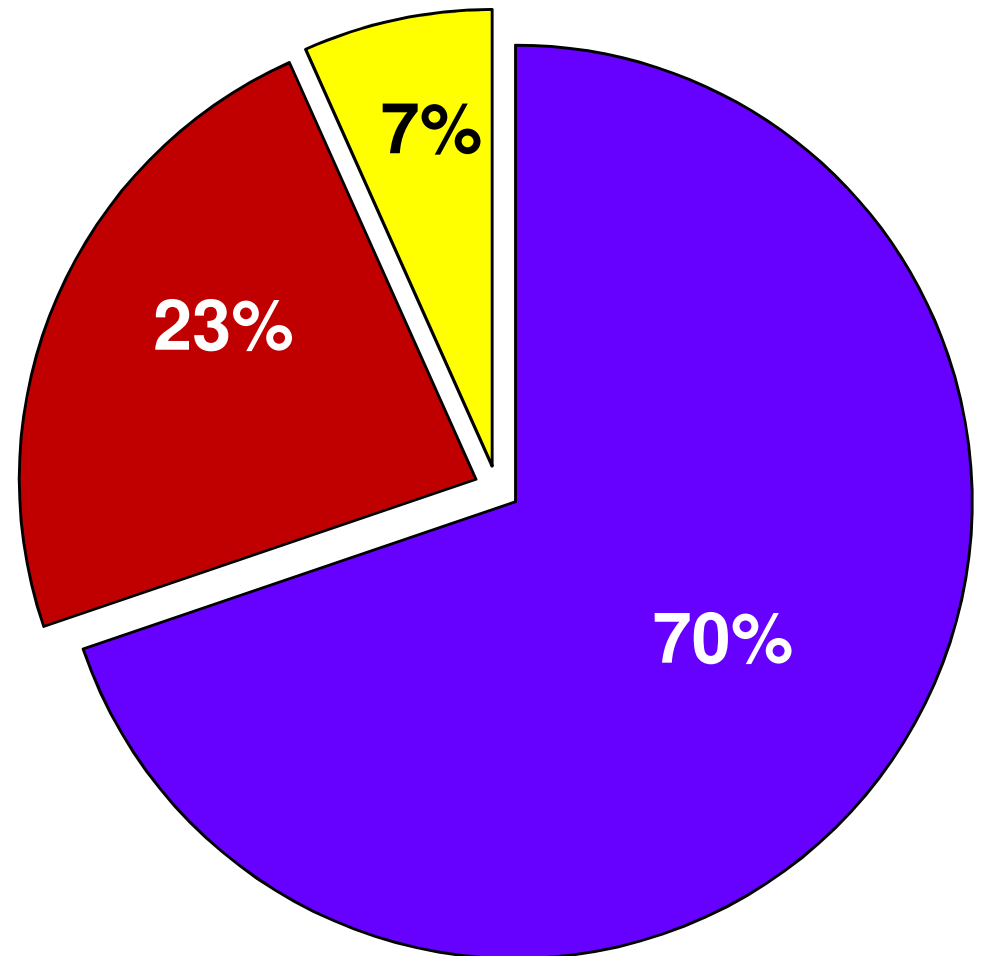
More than **16 billion** hard copy flyers were distributed in Canada in 2010.

This means Canada's 13.7 million households each received at least:

1,178 flyers in a single year

98 flyers per month

22 flyers per week



■ Newspapers

■ Canada Post*

■ Other Flyers

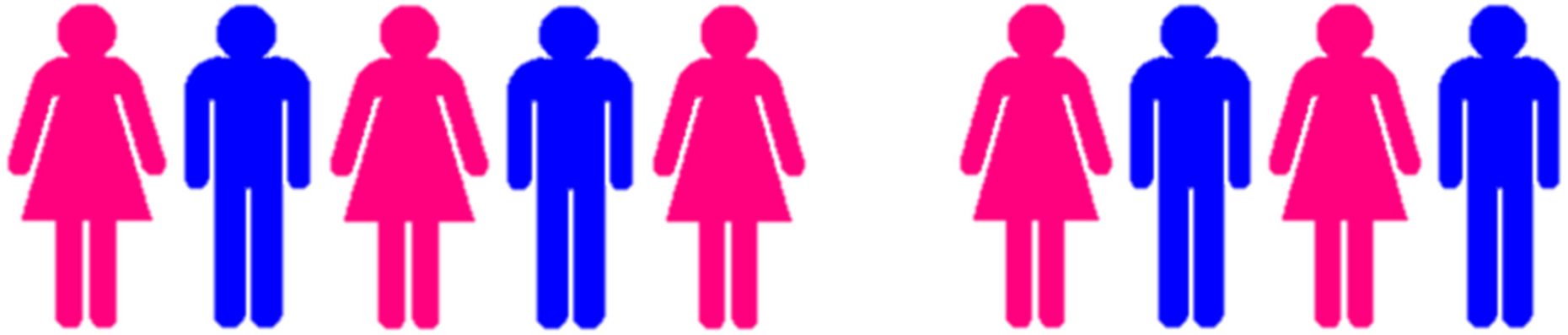
Flyers in Canada 2014

- More people still read printed flyers compared to online flyers, catalogues or coupons.
- Flyer usage strong:
 - Printed flyers and catalogues remained constant.
 - Online flyer usage has increased.
 - Usage of samples and coupons declined.
- Consumer delivery preferences:
 - Printed flyers delivered to their homes.
 - Online flyers delivered to their personal computers.
 - Coupons preferred in multiples and in printed format.

Flyers in Canada 2014

- Thoroughness of reading or looking into both printed and online flyers depends on the category.
- Consumers respond to flyers:
 - 98% have taken some kind of action
 - Eight of ten have purchased a product/service
- Printed and online flyers are primarily used to look for deals or the best prices available.

FLYER USAGE AND READERSHIP



**In 2014, nine out of ten adults (93%)
reported reading, looking into or
accessing any type of flyer.**

Flyer Usage by Region

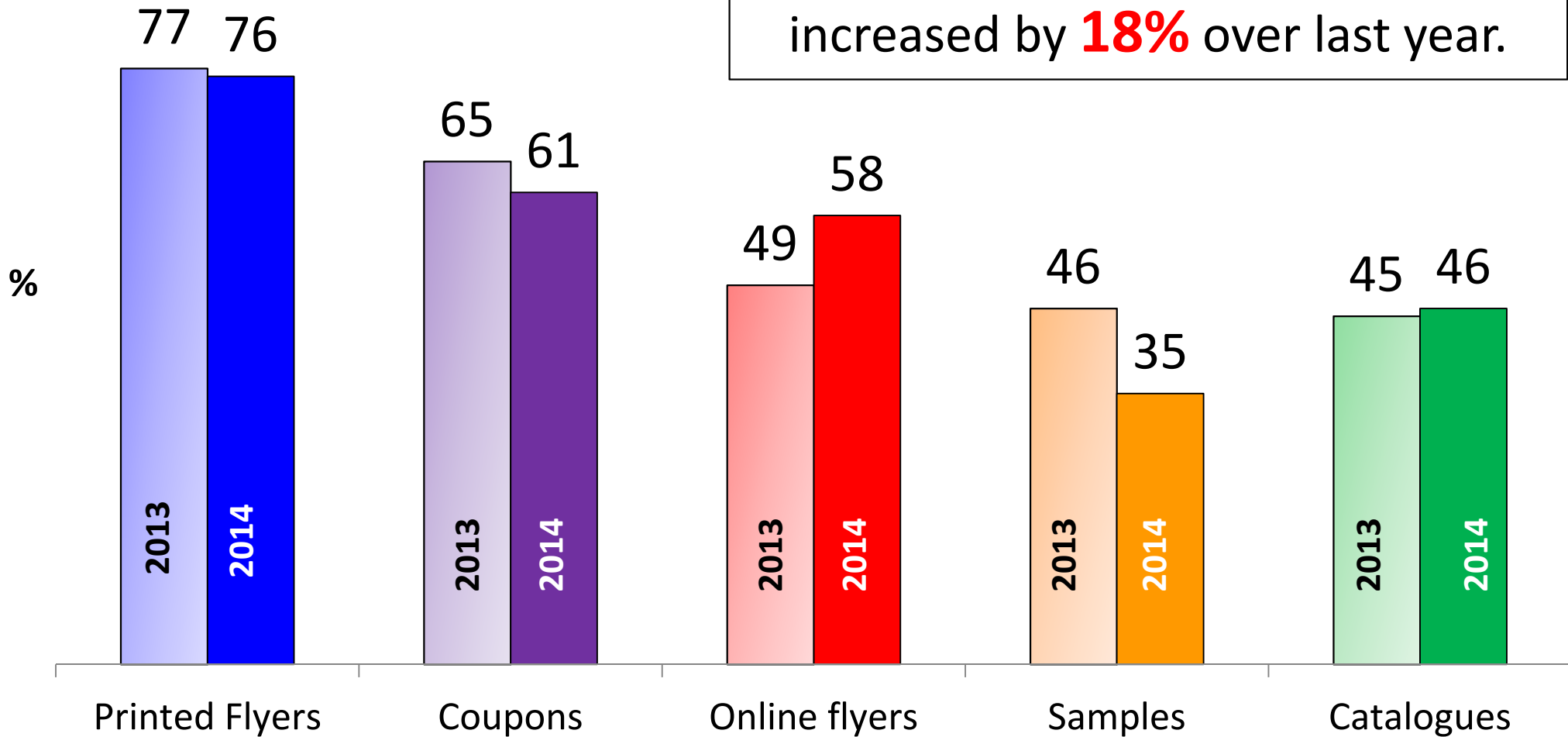
%	2014 TOTAL	West	Ontario	Atlantic
Printed Flyers	76	71	80	78
Coupons	61	58	67	59
Online flyers	58	51	62	61
Samples	35	32	41	32
Catalogues	46	32	55	51

Question: Which of the following do you read, look into or access? English only.
 Source: FDSA 2014 Consumer Engagement Study, Totum Research

Flyer Usage

2014 vs. 2013

Usage of printed flyers has remained the same in English Canada. Online flyer usage has increased by **18%** over last year.



Printed vs. Online Flyers

2013

77% read printed flyers

- 47% *printed only*
- 53% *printed + online*

2014

76% read printed flyers

- 41% *printed only*
- 59% *printed + online*

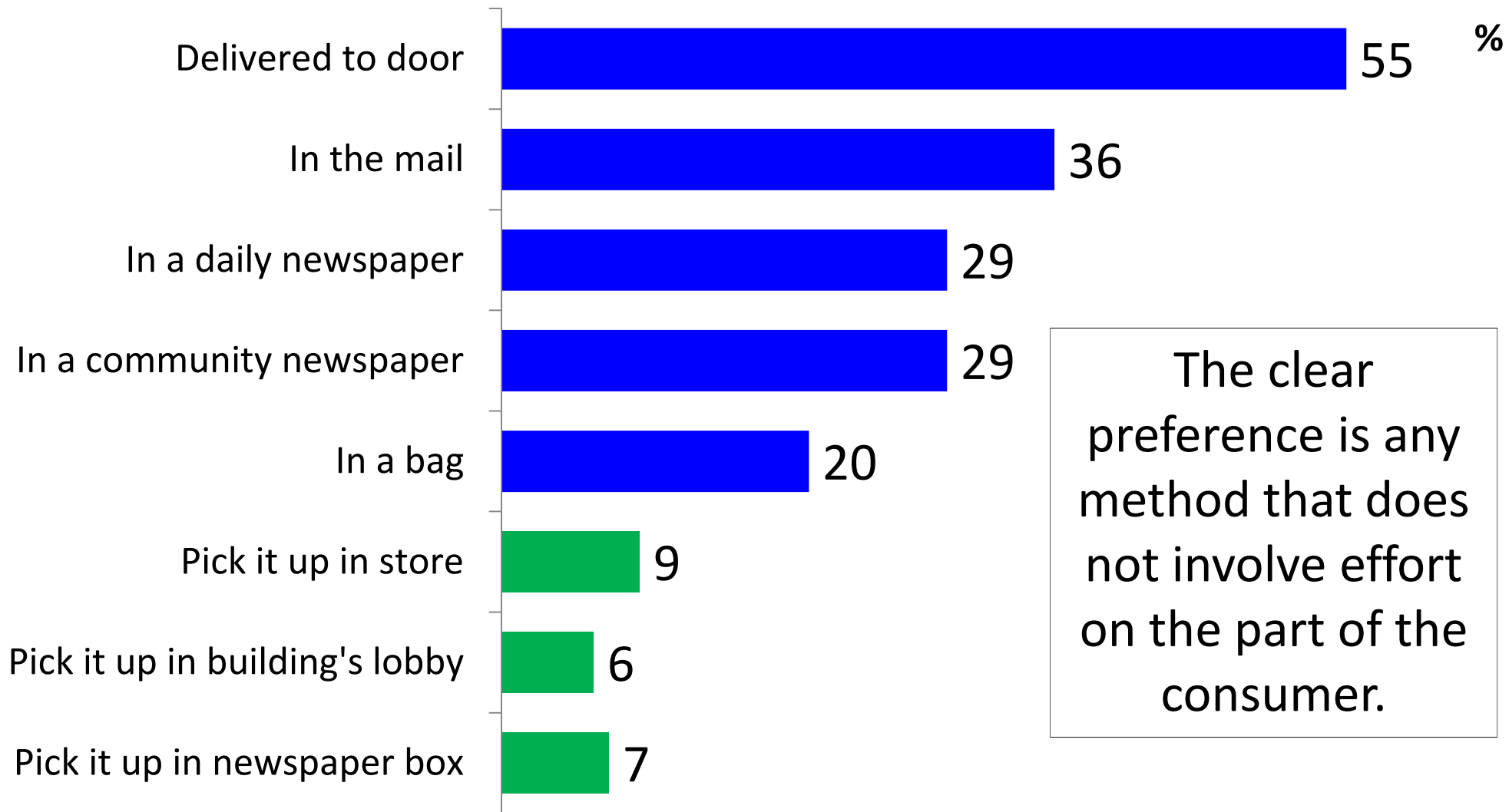
49% read online flyers

58% read online flyers

Consumers are still reading their printed flyers but ALSO adding online flyers to their reading habit.

PREFERRED METHOD OF RECEIPT

Preferred Method of Receipt Printed Flyers

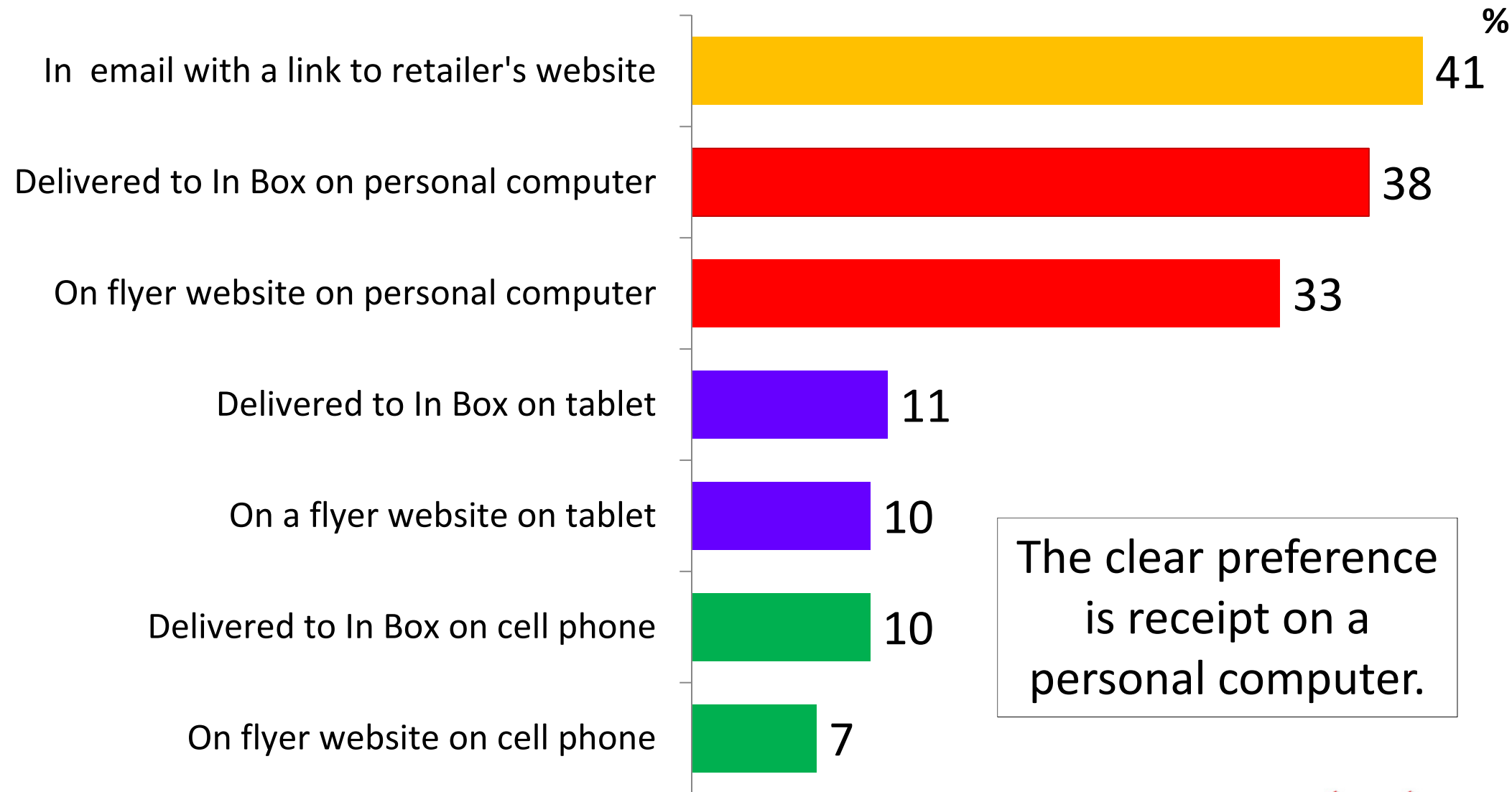


Question: How would you prefer to receive your printed flyers? English only.

Duplication of response was allowed, therefore "Delivered to door" could include delivered to the door in a newspaper.

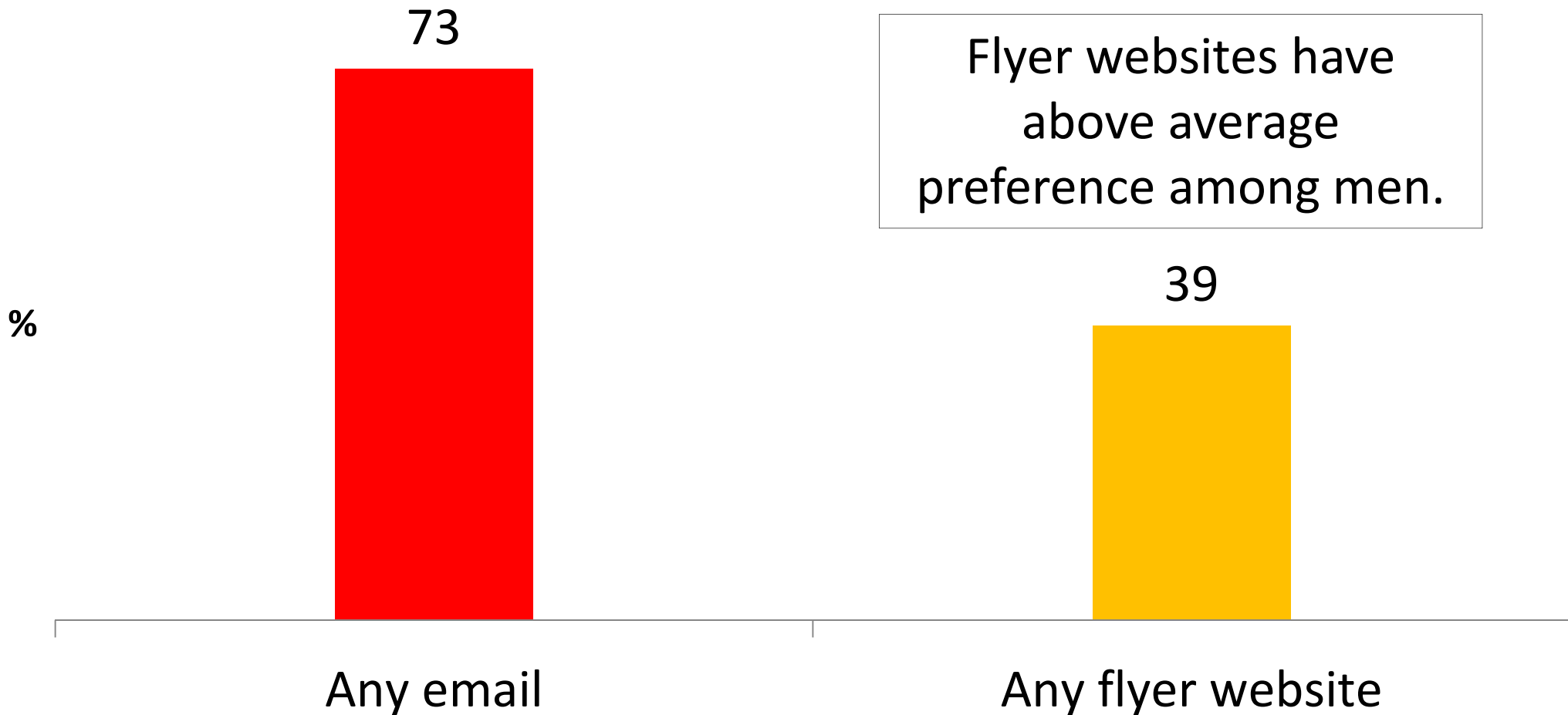
Source: FDSA 2014 Consumer Engagement Study, Totum Research

Preferred Method of Receipt Online Flyers



The clear preference is receipt on a personal computer.

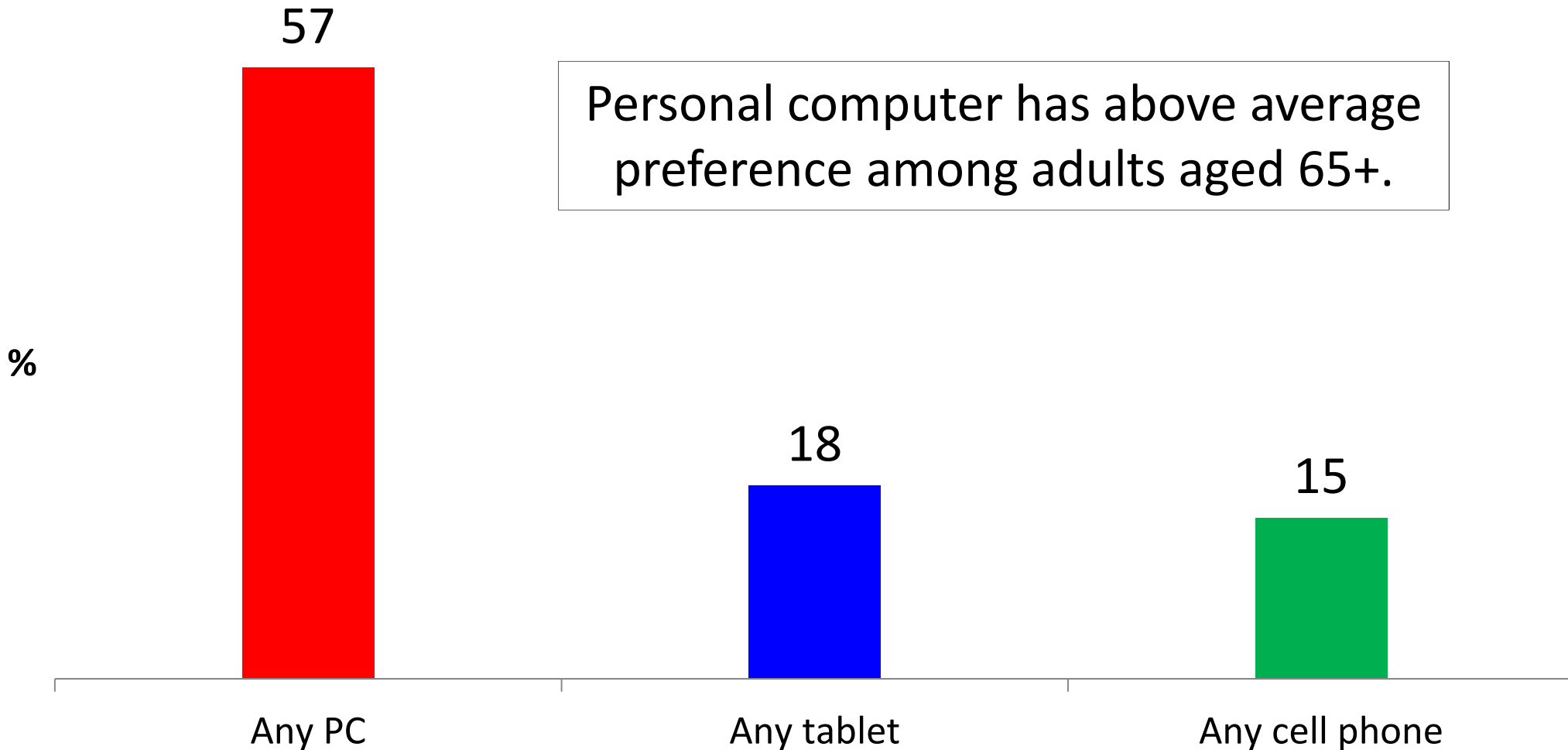
Preferred Method of Receipt Online Flyers – Media Summary



“Any email” includes “Delivered to In Box” on PC, tablet and/or cell phone”.

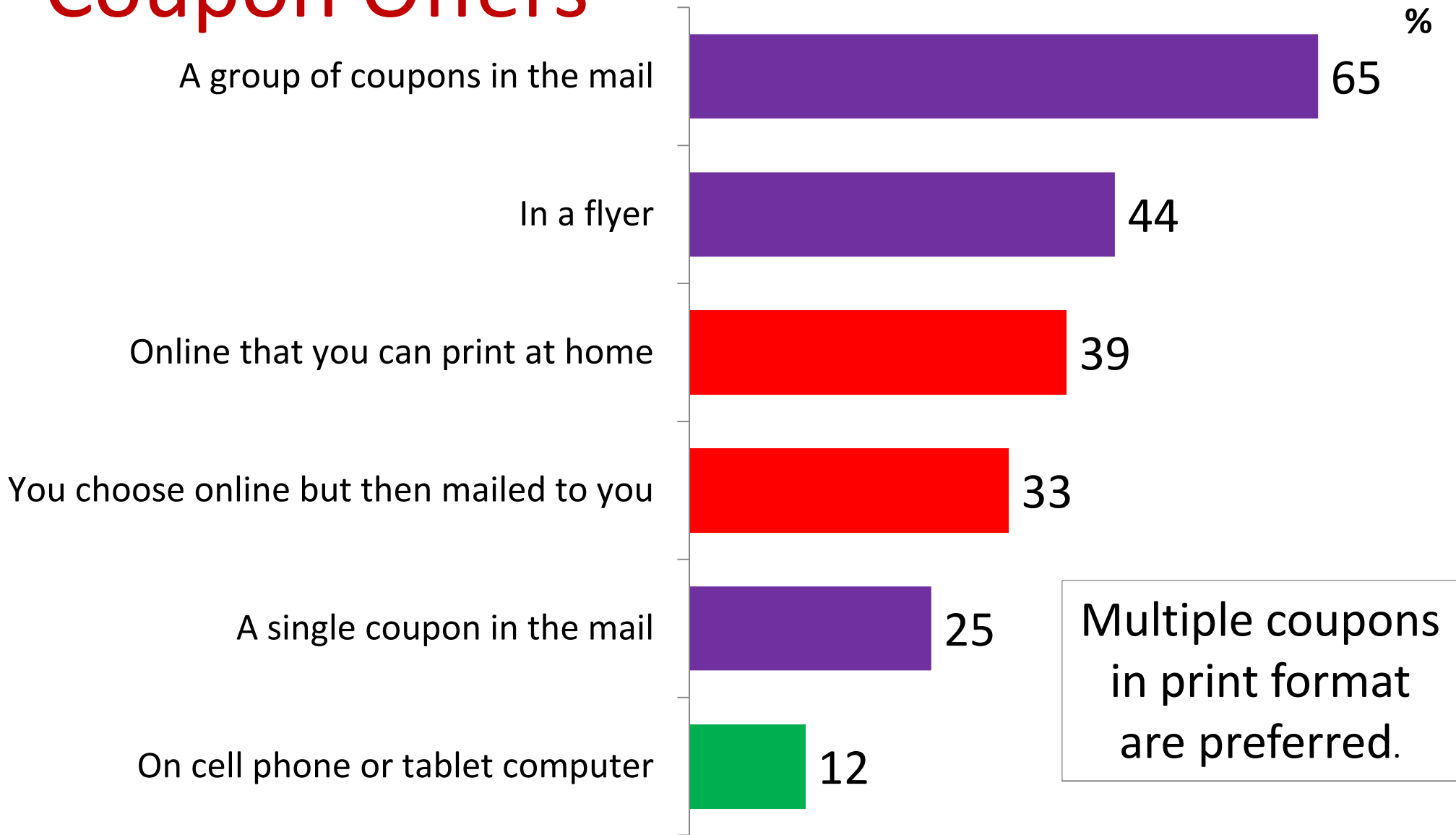
“Any flyer website” includes “On a flyer website” on PC, tablet and/or cell phone”.

Preferred Method of Receipt Online Flyers – Device Summary



“Any PC” includes “Delivered to In Box on your PC” and/or “On a flyer website on your PC”.
“Any tablet” includes “Delivered to In Box on your tablet” and/or “On a flyer website on your tablet computer”
“Any cell phone” includes “Delivered to In Box on your cell phone” and/or “On a flyer website on your cell phone”

Preferred Method of Receipt Coupon Offers



Question: How would you prefer to receive your coupons? English only.

Source: FDSA 2014 Consumer Engagement Study, Totum Research

FLYERS DRIVE ACTION

Flyers Drive Action

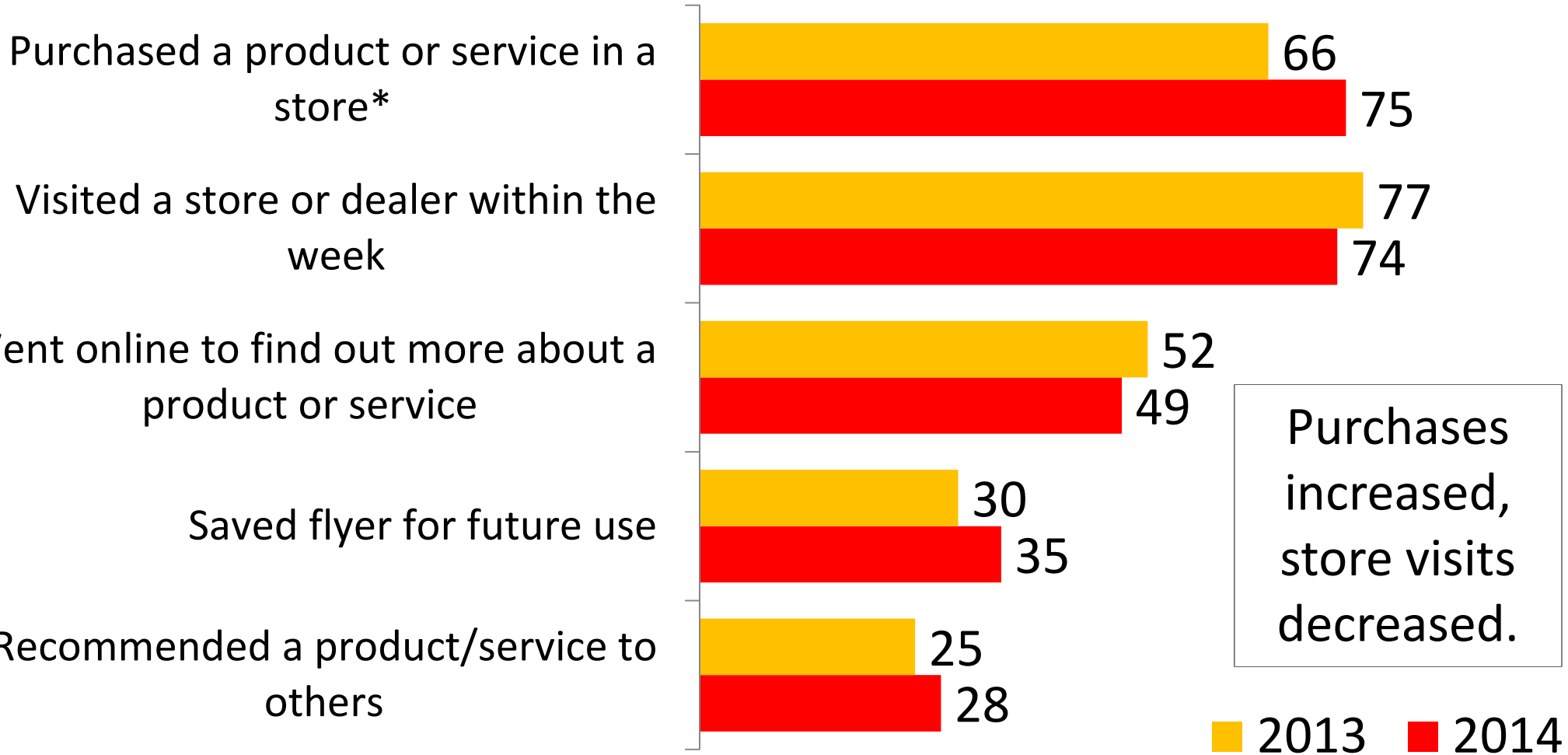
98% of adults took some kind of action after seeing flyer media

- **85%** of printed flyer readers **purchased a product/service** online or in-store
- **84%** of catalogue users **visited a store or dealer** within the week
- **63%** of online flyer readers **went online** for further research
- Sample users are **55%** more likely to **recommend a product/service** to others
- **45%** of coupon users **save them for future usage**

Flyers Drive Action

2014 vs. 2013

Actions Taken as a Result of Seeing Flyers %



Question: Which of the following actions have you taken as a result of viewing a flyer? English only.

* The words "in a store" were added in 2014.

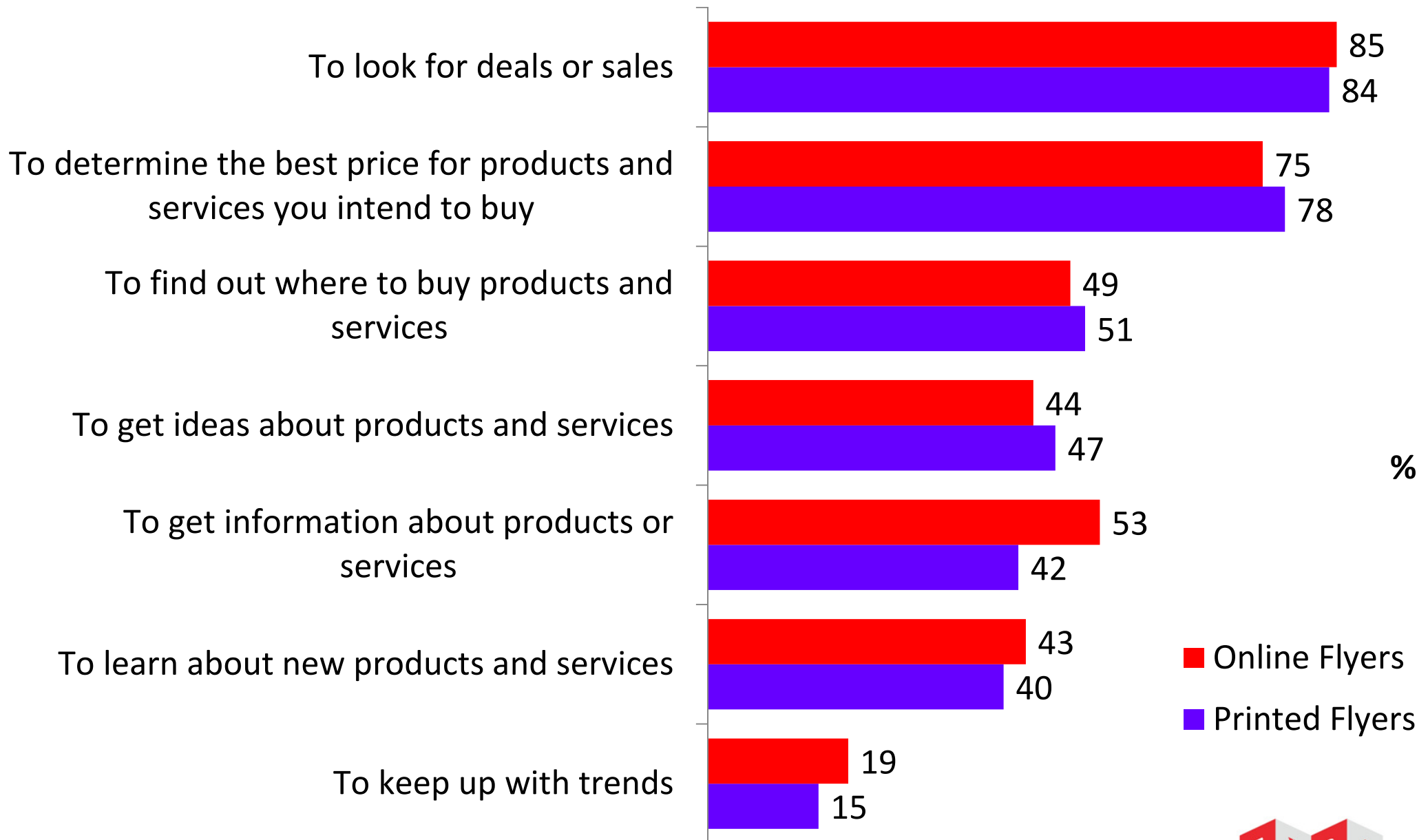
Source: FDSA 2014 Consumer Engagement Study, Totum Research

REASONS FOR READING FLYERS

Reasons for Reading Flyers

- The most frequently stated reason for reading printed or online flyers is to look for deals and sales.
- Consumers also use flyers to find the best prices for products they already intend to buy.
- Flyers are also used for:
 - information,
 - learning about new products,
 - getting ideas and
 - keeping up with trends.

Reasons For Reading Flyers



Question: Please indicate your main reasons for reading or looking into printed flyers. English only.

Source: FDSA 2014 Consumer Engagement Study, Totum Research

READERSHIP OF FLYERS BY CATEGORY

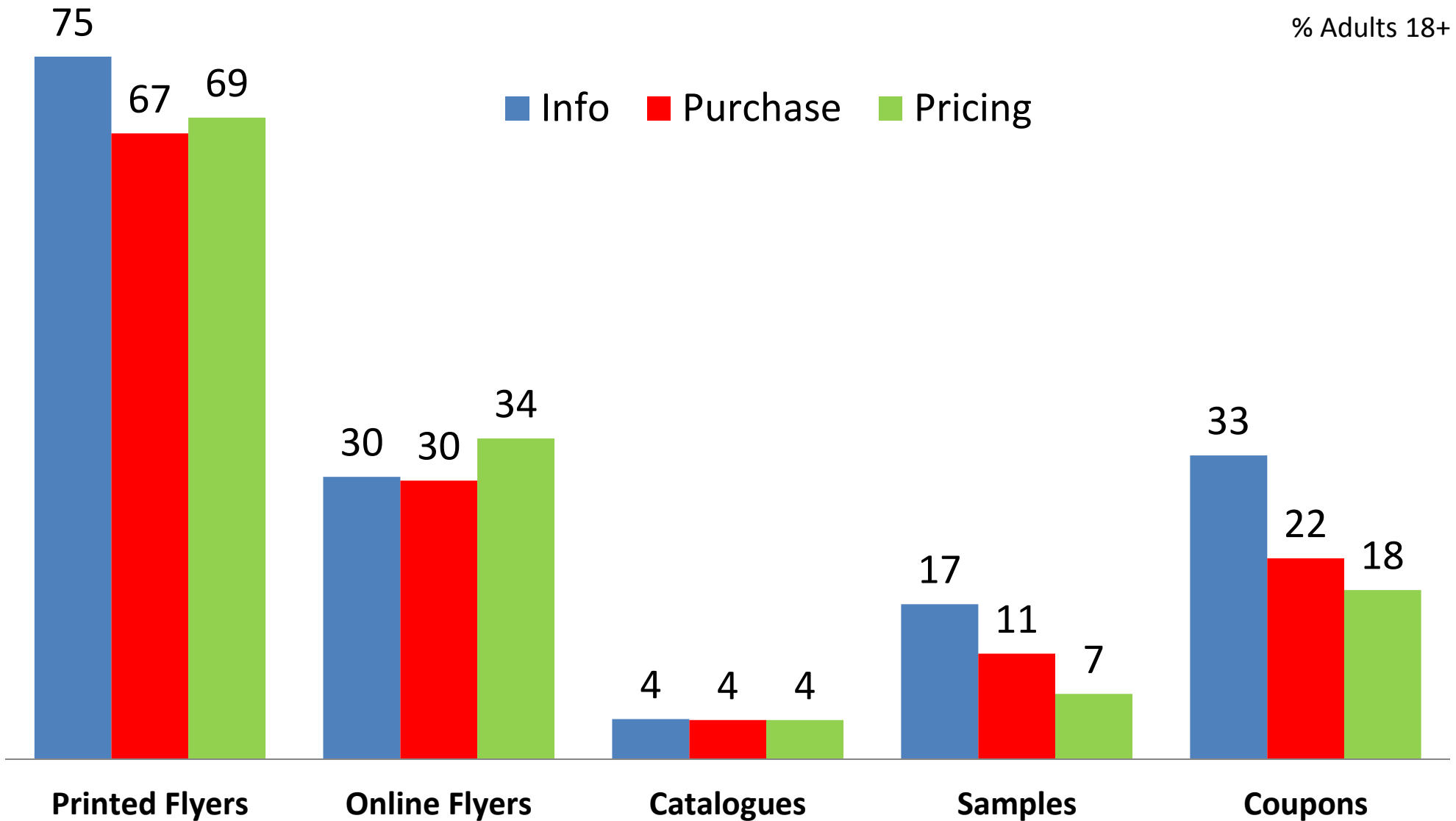
Readership of Flyers by Category

Categories Measured

Appliances, Furniture, Home Furnishings	Home Entertainment Items
Automotive	Home Improvement Products/Services
Clothing and Accessories	Hospitals, Charities, Fundraisers
Computer Hardware and Software	Investments, Banking Services
Entertainment and Restaurants	Real Estate
Groceries	Sports Equipment
Hardware Products	Travel and Tourism
Health Care, Personal Care Items	Wireless Products

Groceries – Path to Purchase

% Adults 18+



Q: When you are looking for information about groceries/where to purchase groceries/grocery pricing information, which of the listed media do you reference?

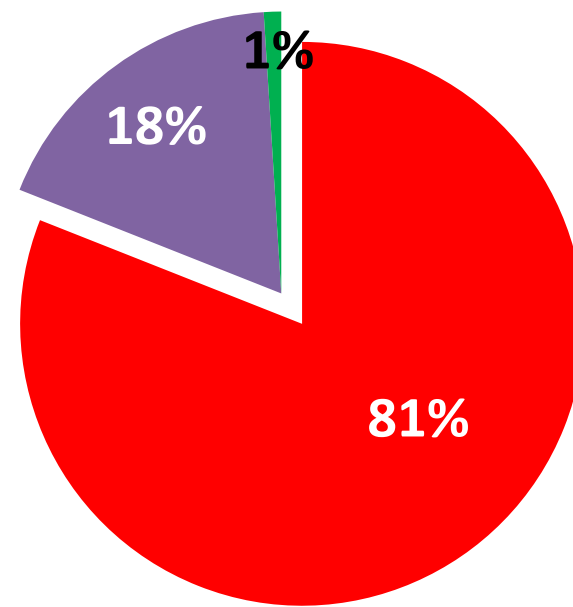
Source: FDSA 2013 Consumer Engagement Study, Totum Research

Groceries

81% read **All/Most** of printed grocery flyers.

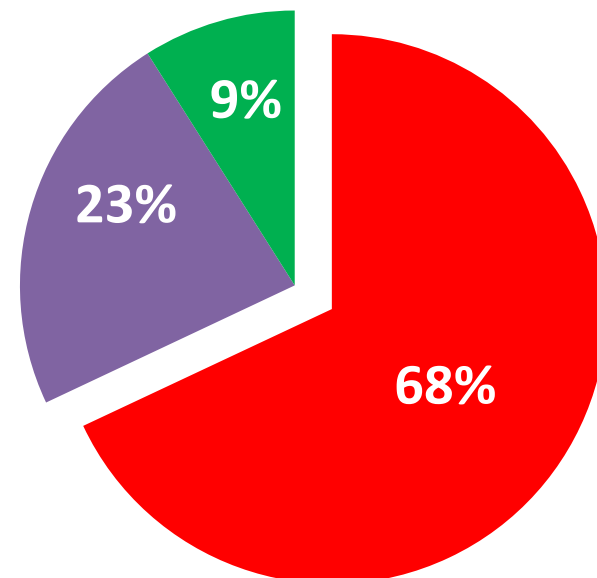
- 57% are female.
- 70% are married.
- 90% are looking for deals or sales.
- 80% are looking for the best price.
- 57% prefer to have flyers delivered to their door.
- 88% visited a store within the week and purchased a product.

Printed Flyers



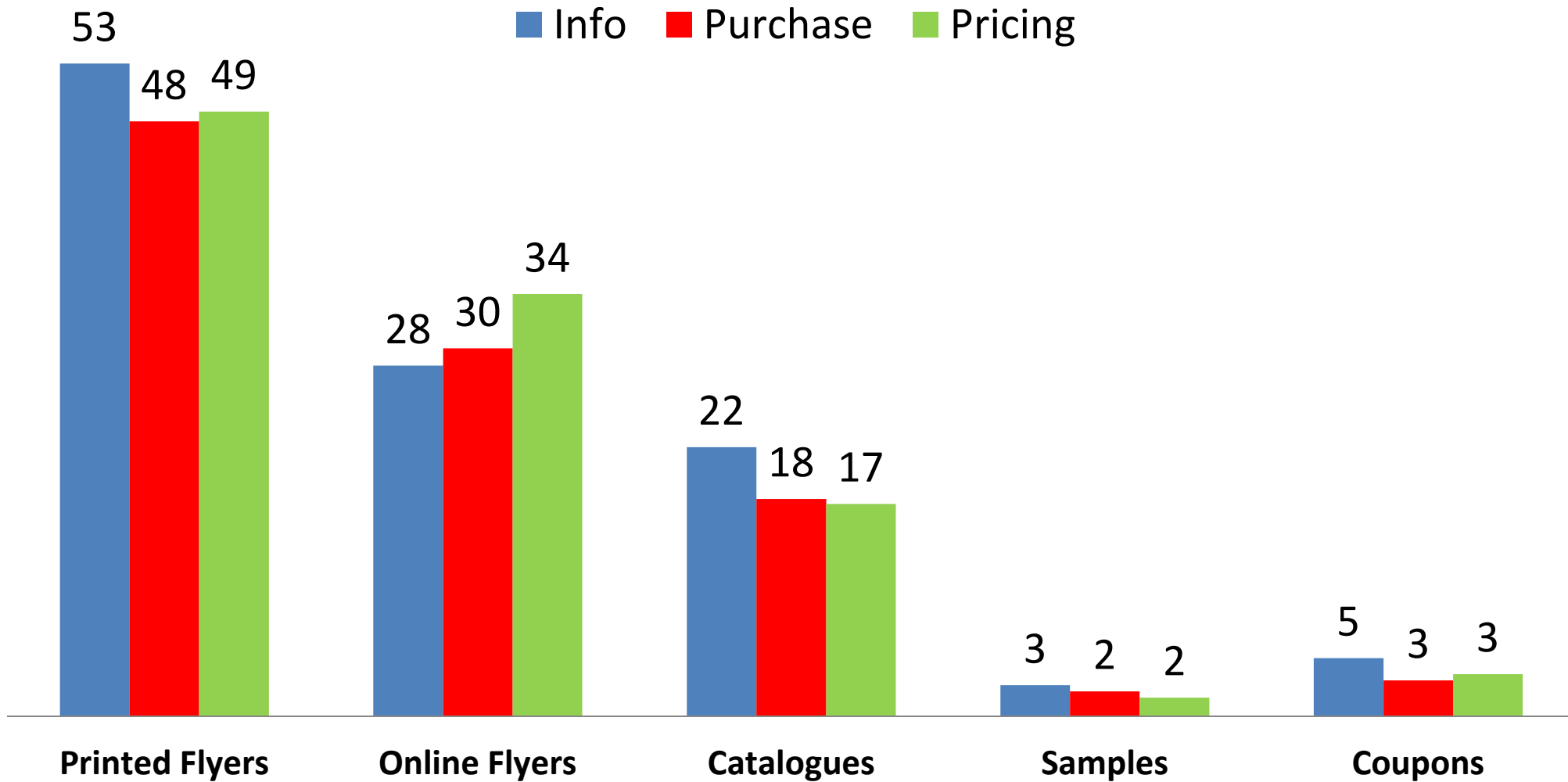
■ All/Most ■ A Few Pages/Skim ■ None

Online Flyers



Appliances and Furniture Path to Purchase

% Adults 18+



Q: When you are looking for information about groceries/where to purchase groceries/grocery pricing information, which of the listed media do you reference?

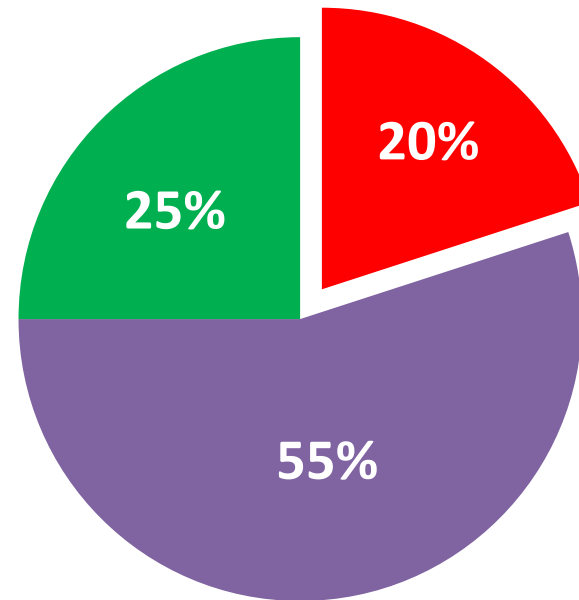
Source: FDSA 2013 Consumer Engagement Study, Totum Research

Appliances, Furniture, Home Furnishings

38% read All/Most of online appliance, furniture and home furnishings flyers.

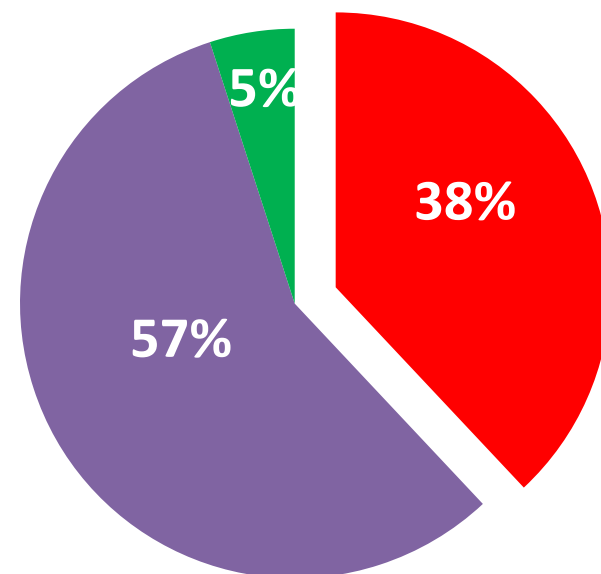
- **49%** are female.
- **78%** are married.
- **76%** are looking for deals or sales.
- **60%** are looking for information.
- **37%** prefer to have flyers delivered to their PC In Box.
- **79%** purchased a product online or in a store.

Printed Flyers



■ All/Most ■ A Few Pages/Skim ■ None

Online Flyers



Thoroughness of Reading

	PRINTED FLYERS			ONLINE FLYERS		
	All/Most	A Few Pages/Skim	None	All/Most	A Few Pages/Skim	None
Appliances, Furniture, Home Furnishings	20	55	25	38	57	5
Automotive	20	43	37	21	43	36
Clothing and Accessories	33	54	13	33	45	22
Computer Hardware and Software	26	50	24	32	38	30
Entertainment and Restaurants	32	49	19	27	48	25
Groceries	81	18	1	68	23	9
Hardware Products	37	48	15	31	41	28
Health Care, Personal Care Items	35	49	16	31	44	25
Home Entertainment Items	26	52	22	32	43	25
Home Improvement Products/Services	31	50	19	27	46	27
Hospitals, Charities, Fundraisers	7	54	39	7	45	48
Investments, Banking Services	13	44	43	15	35	50
Real Estate	13	46	41	14	41	45
Sports Equipment	13	45	42	17	40	43
Travel and Tourism	28	47	25	28	45	27
Wireless Products	16	49	35	21	43	36

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