

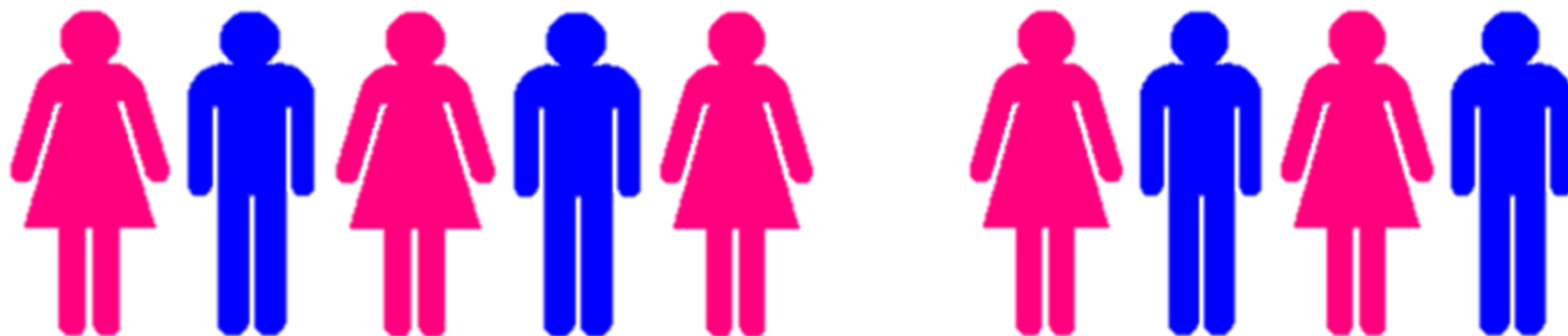


FLYER DISTRIBUTION  
STANDARDS ASSOCIATION

# **FDSA Consumer Engagement Research**



*Totum Research Inc*



**Nine out of ten adults (91%)  
reported reading, looking into or  
accessing any type of flyer.**

# Flyer Distribution in Canada

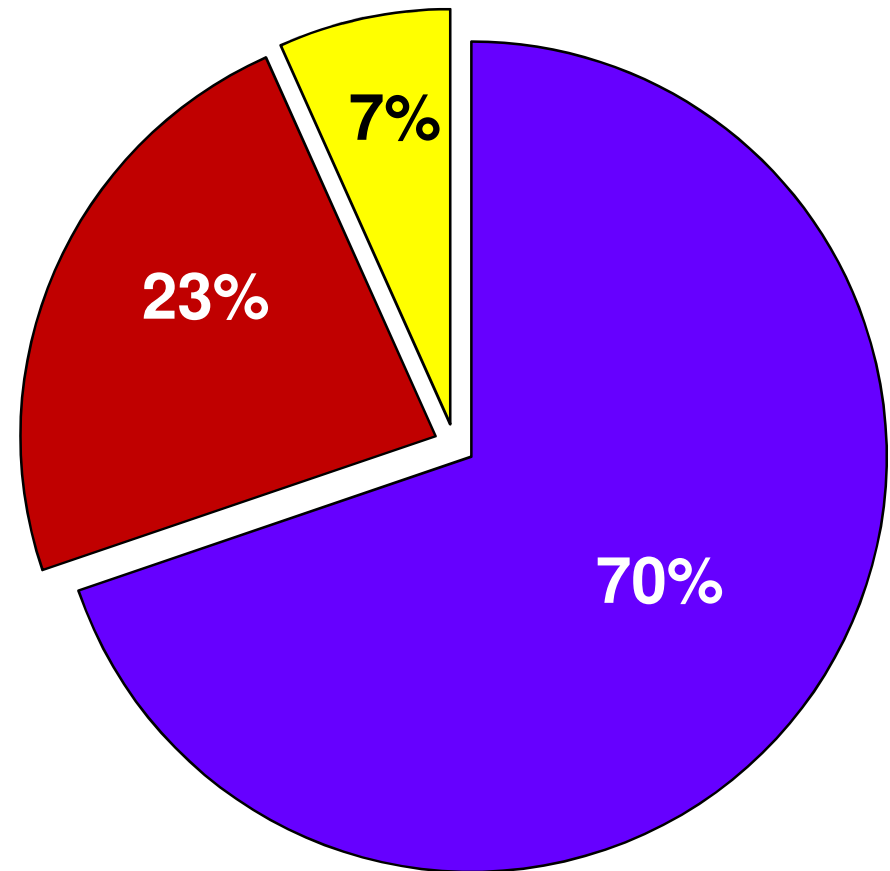
More than **16 billion** hard copy flyers were distributed in Canada in 2010.

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

# Consumer Engagement Research



## 2013 Study

- Path to Purchase (by category)
- Preferred Frequency of Receipt

## 2014 Study

- Thoroughness of Reading Flyers (by category)
- Reasons for Reading
- Preferred Method of Receipt – Printed, Online, Coupons

## 2015 Study

- Flyer Usage before Shopping (by category)
- Preferred Method of Receipt – Printed, Online, Coupons
- Frequency of Using Flyers Compared to Last Year

## All Studies

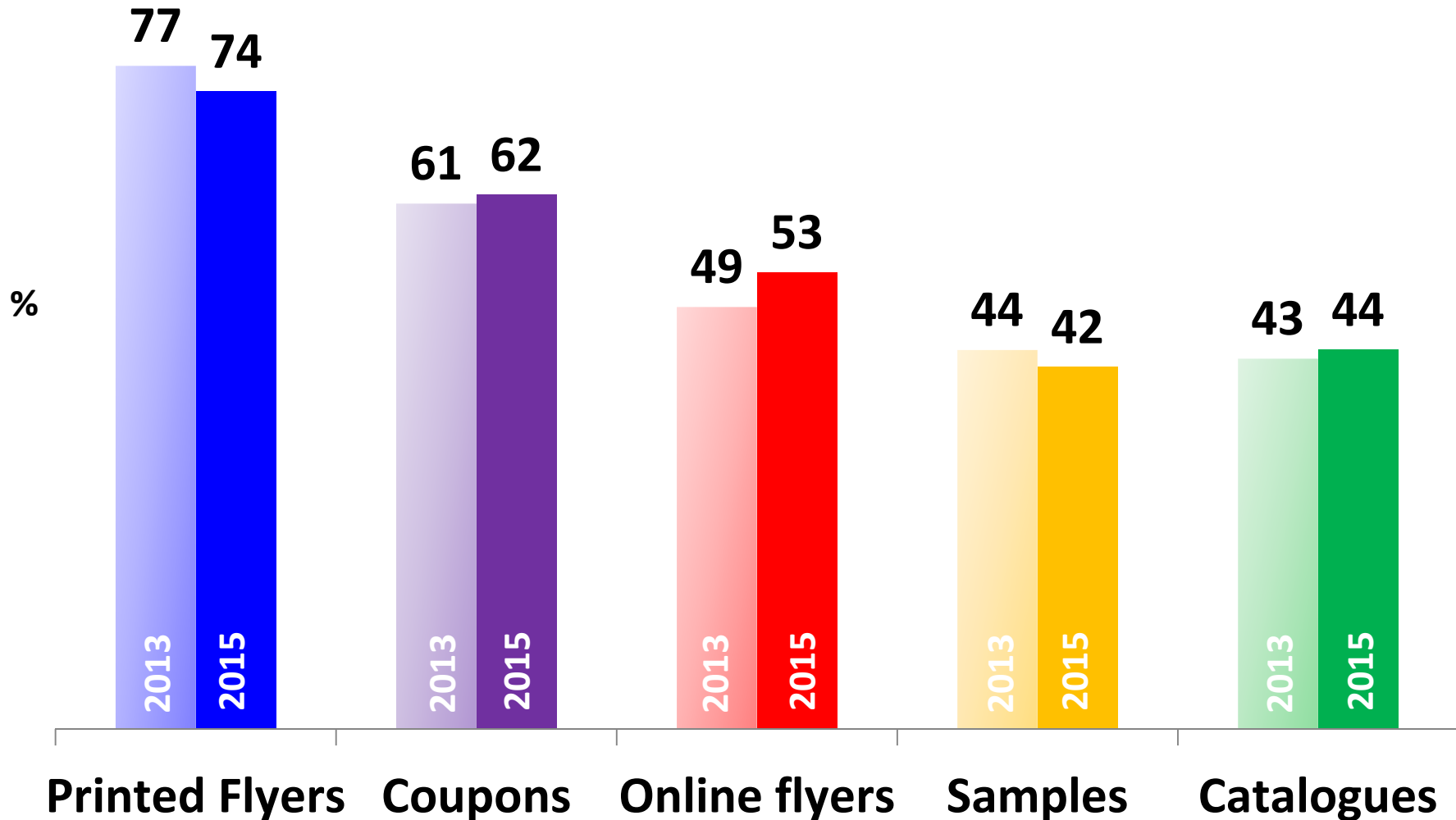
- Flyer usage by media type
- Action Taken as a Result of Flyer Exposure



## FDSA Consumer Engagement Study

# FLYER USAGE AND READERSHIP

# More People are Exposed to Printed Flyers than to other Flyer Media



Question: Which of the following do you read, look into or access?

Source: FDSA Consumer Engagement Study, Totum Research

## Flyer Duplication

Canadians reading printed flyers are also accessing other types of flyers/media.

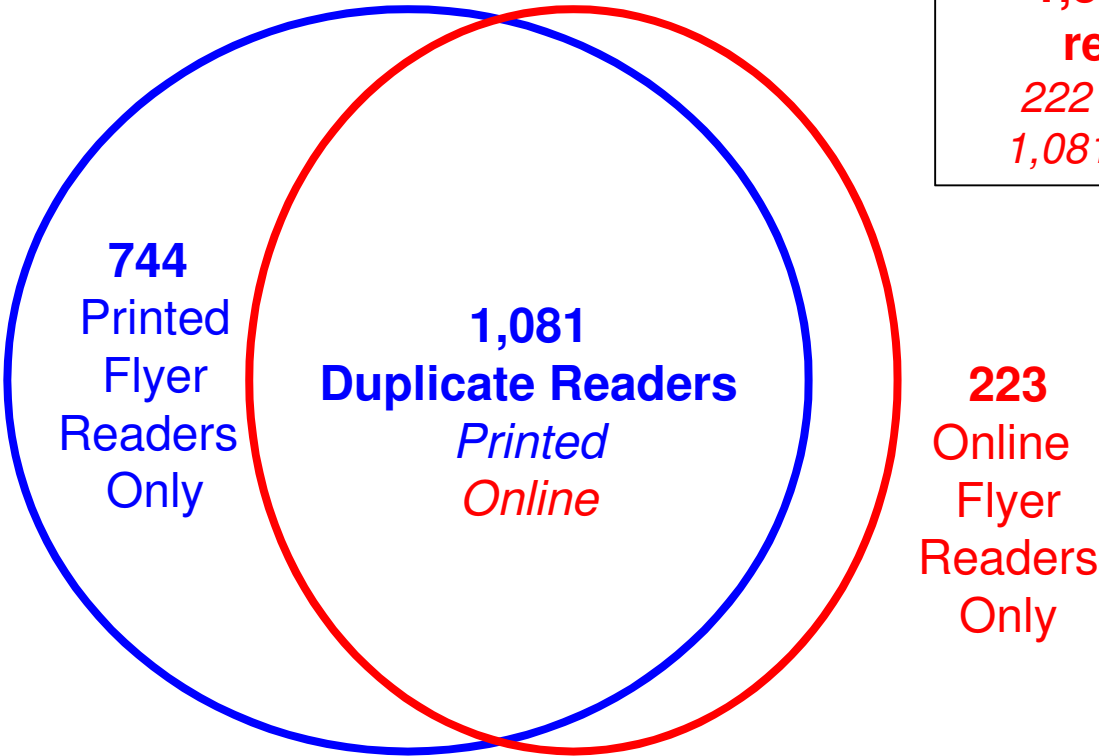
- **53%** are also accessing online flyers;
- **50%** are also reading catalogues and using samples; and
- **69%** are using coupons.

# Duplicate and Exclusive Printed and Online Flyers



**Printed Flyers**  
**1,825 total readers**  
*744 exclusive*  
*1,081 duplicate*

**Online Flyers**  
**1,303 total readers**  
*222 exclusive*  
*1,081 duplicate*



**Total Flyer Readers (Printed/Online) = 2,047**



# Flyer Usage by Region



Ontario indexes above average for online flyer usage.  
Samples index highest in Ontario and Atlantic.

%	2015 TOTAL	West	Ontario	Quebec	Atlantic
Printed Flyers	<b>74</b>	73	74	75	81
Coupons	<b>62</b>	65	65	53	63
Online flyers	<b>53</b>	46	59	51	56
Samples	<b>42</b>	41	44	42	44
Catalogues	<b>44</b>	44	42	44	55

Question: Which of the following do you read, look into or access?

Source: FDSA Consumer Engagement Study, Totum Research



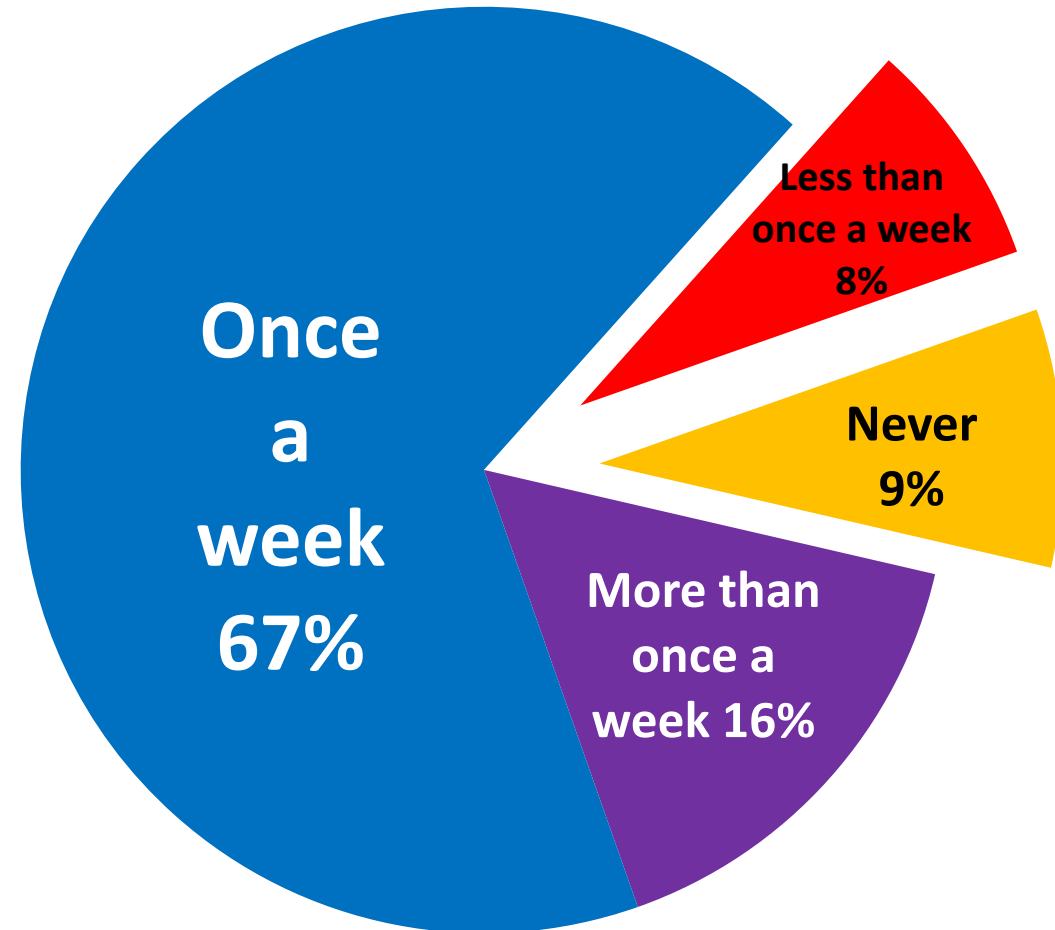
## FDSA Consumer Engagement Study

# FLYER RECEIPT – FREQUENCY AND METHOD

# Nine out of Ten Adults Like to Receive Flyers

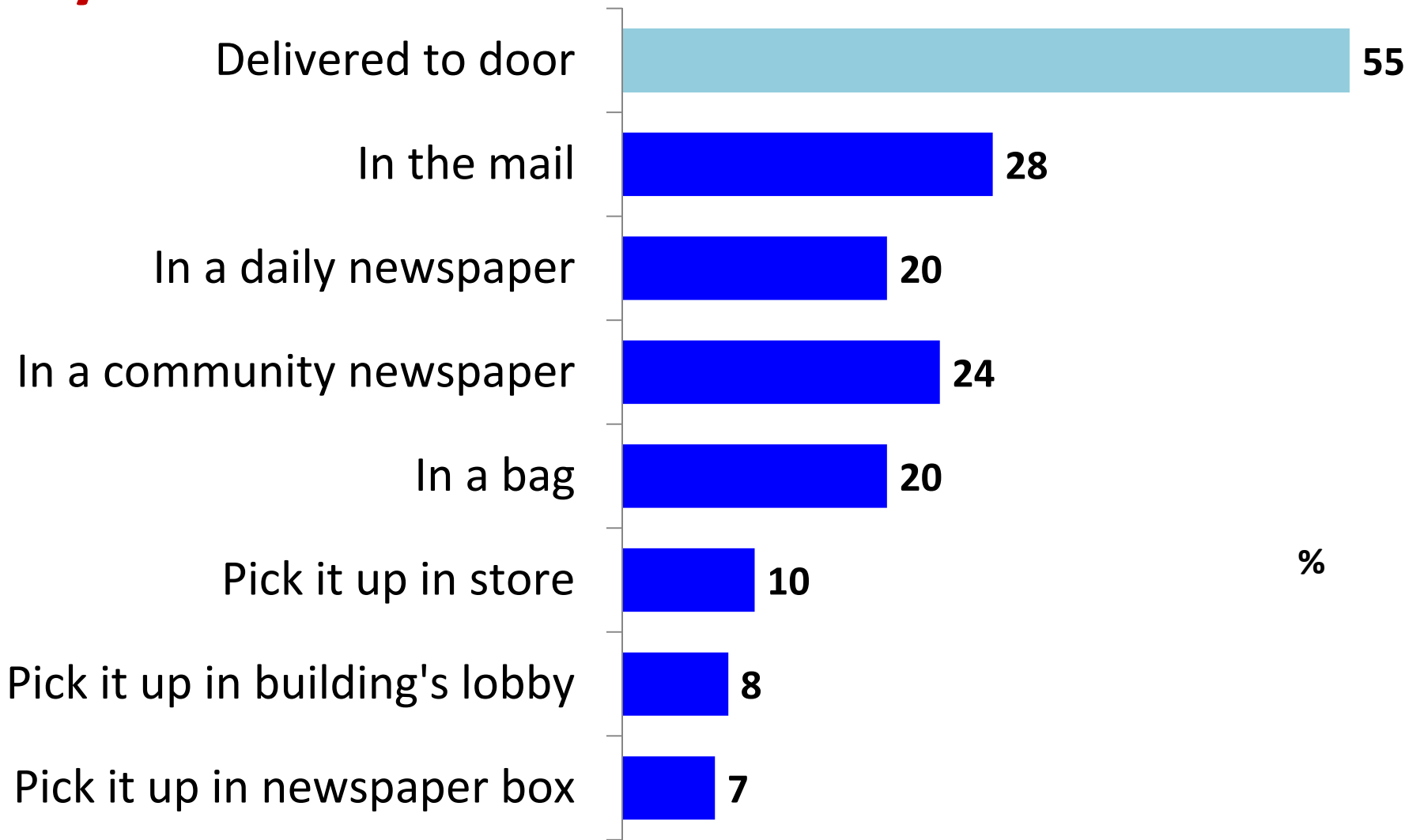


- More than **80%** indicate they would like to receive flyers once a week or more often.
- The majority of adults (**67%**) like to receive flyers once a week.



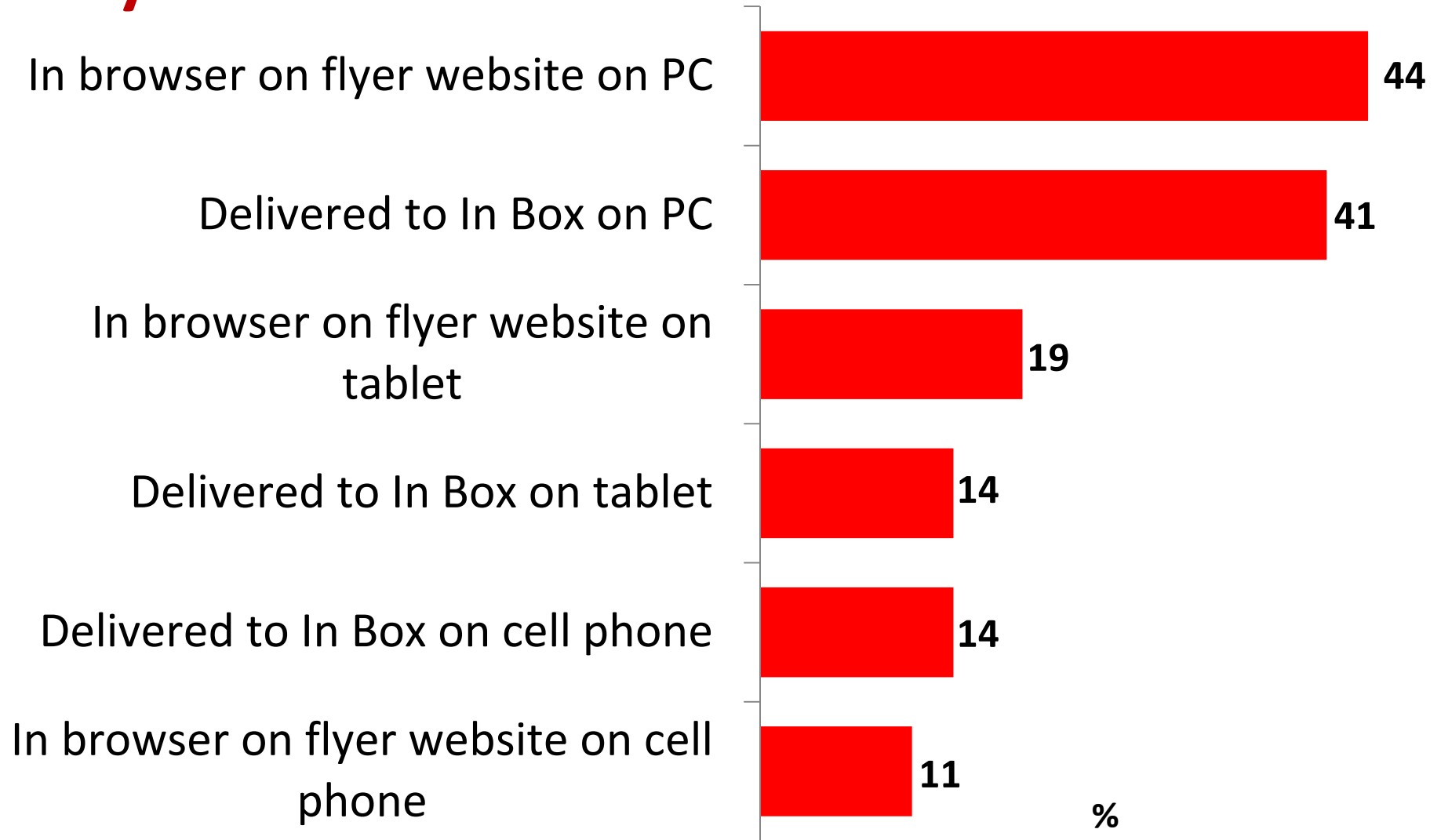
Question: How thoroughly do you personally read or look into printed flyers for the following products or services?  
Source: FDSA 2014 Consumer Engagement Study, Totum Research

# Preferred Way to Receive Printed Flyers



Question: How would you prefer to receive your printed flyers?  
Source: FDSA Consumer Engagement Study, Totum Research

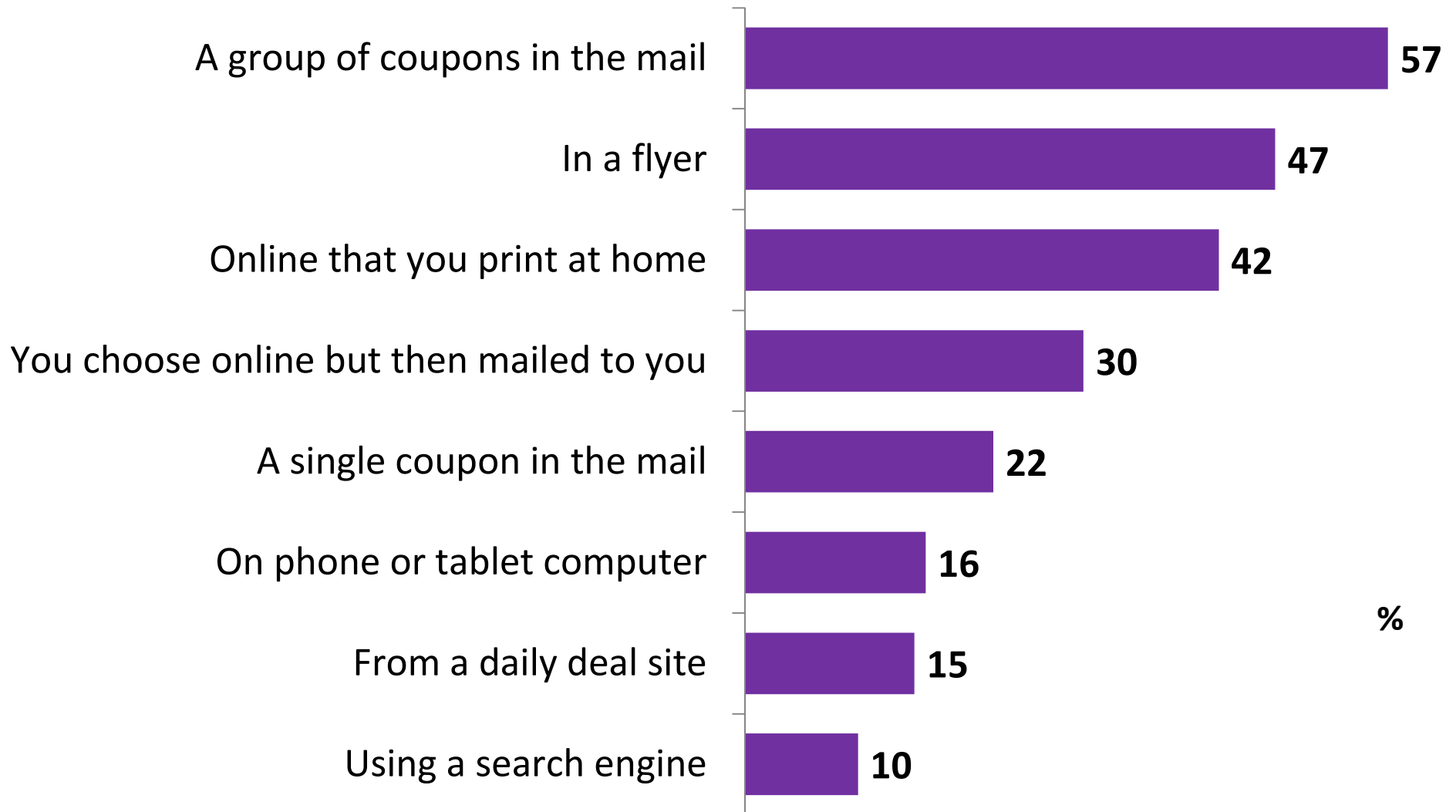
# Preferred Way to Receive Online Flyers



Question: How would you prefer to receive your online flyers?

Source: FDSA Consumer Engagement Study, Totum Research

# Preferred Way to Receive Coupons



Question: How would you prefer to receive your coupons?

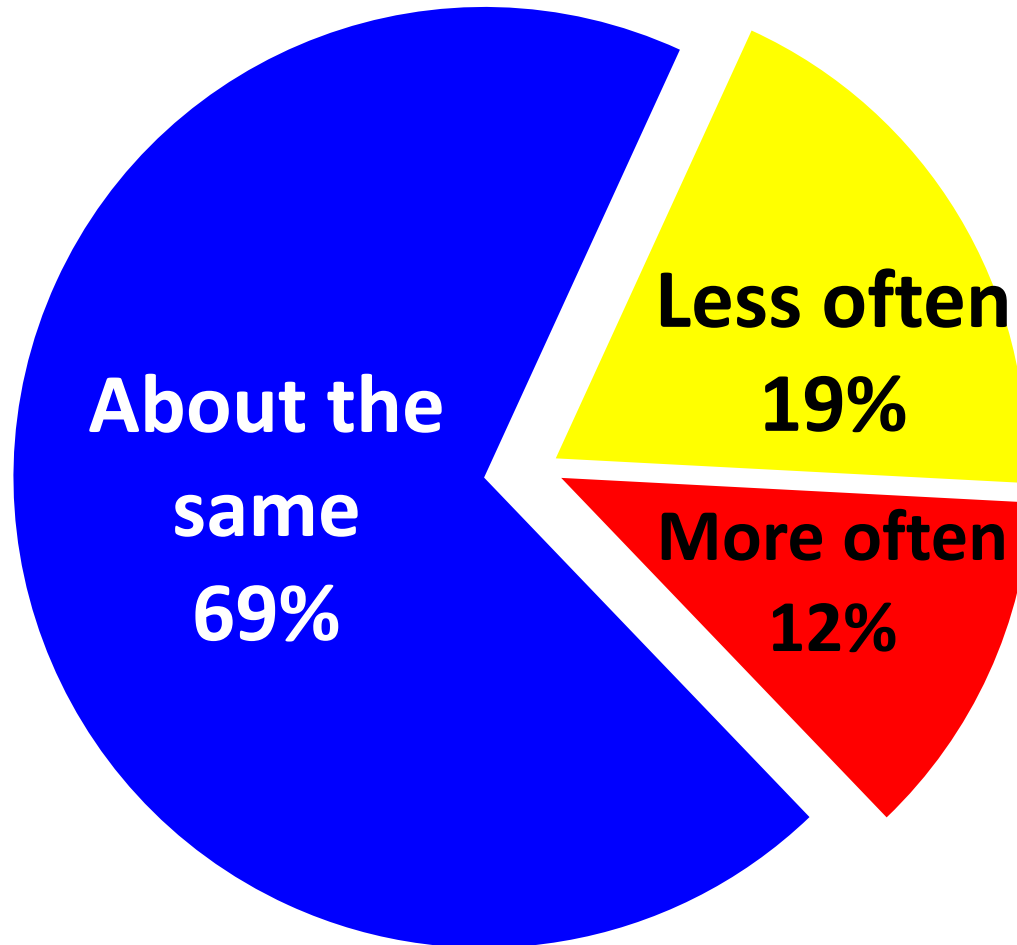
Source: FDSA Consumer Engagement Study, Totum Research



## FDSA Consumer Engagement Study

# FREQUENCY OF FLYER USAGE

# Frequency of Using Printed Flyers vs. a Year Ago

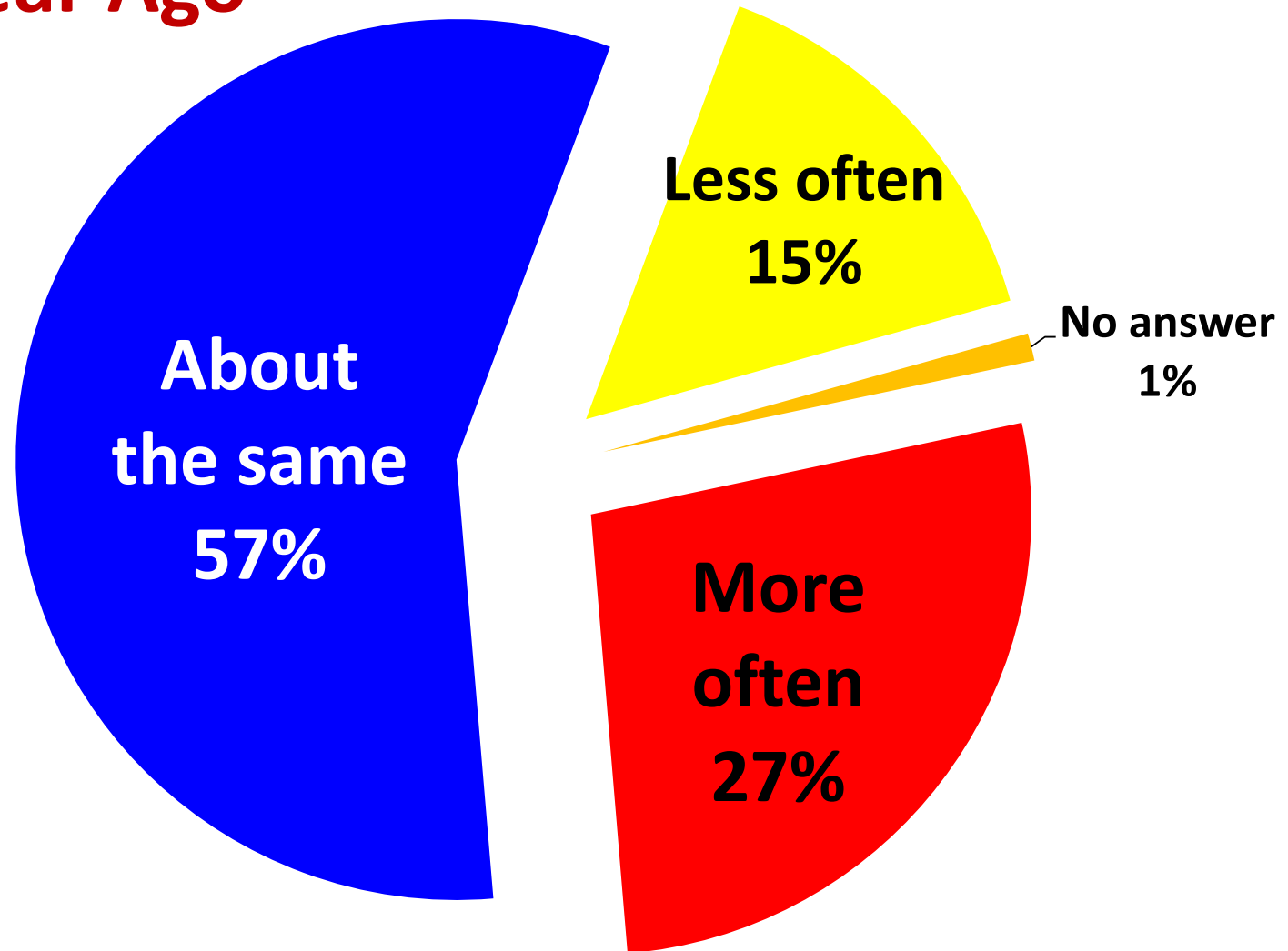


Question: Compared with a year ago are you using printed flyers more often, about the same or less often?

Source: FDSA Consumer Engagement Study, Totum Research



# Frequency of Using Online Flyers vs. a Year Ago



Question: Compared with a year ago are you using printed flyers more often, about the same or less often?

Source: FDSA Consumer Engagement Study, Totum Research



## FDSA Consumer Engagement Study

# ACTION TAKEN AS A RESULT OF FLYER EXPOSURE

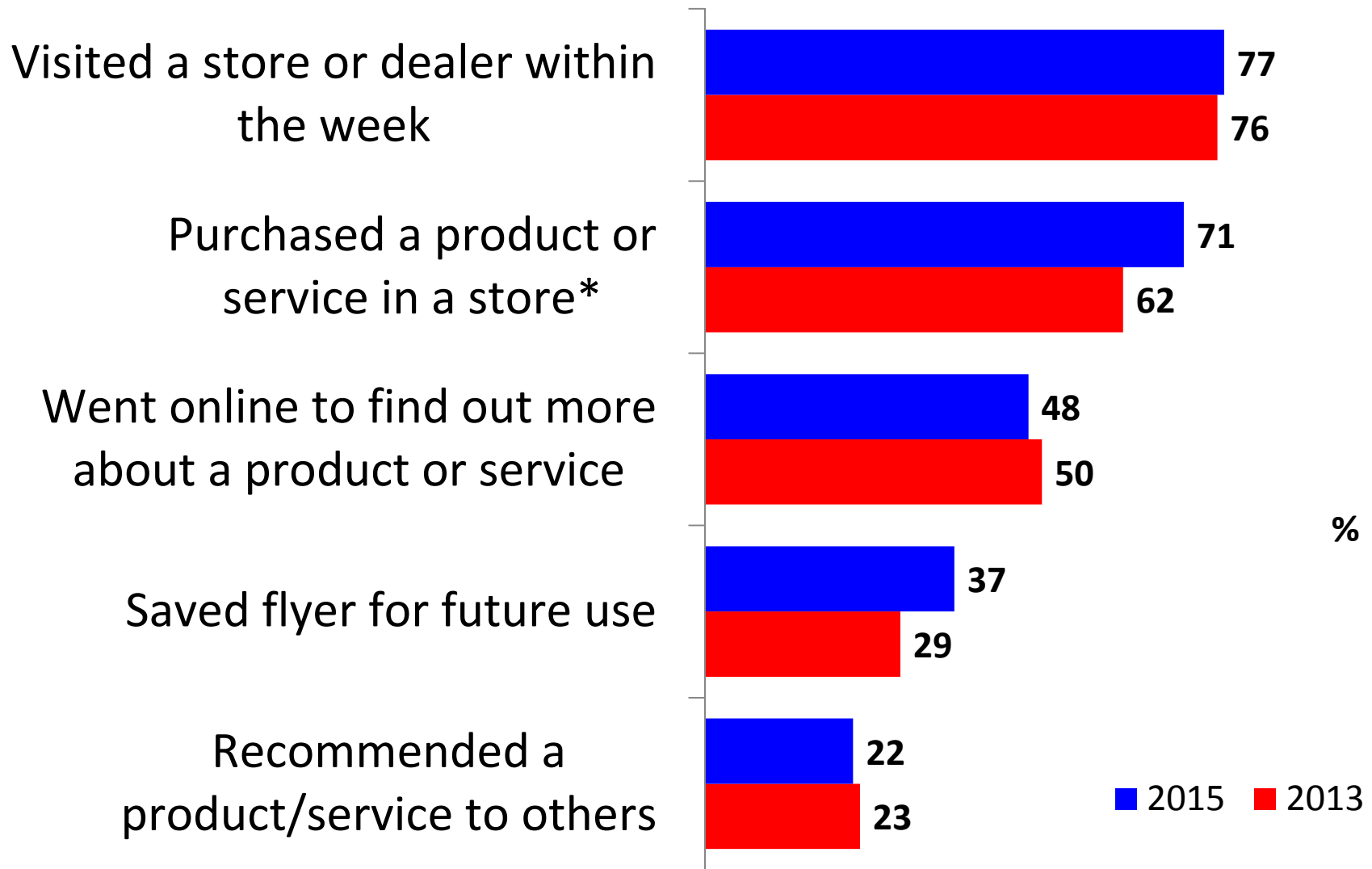
# Flyers Drive Action 2015



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

Source: FDSA Consumer Engagement Study, Totum Research

# Flyers Drive Action 2015 vs 2013



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

Source: FDSA Consumer Engagement Study, Totum Research

\* The words "in a store" were added in 2015.



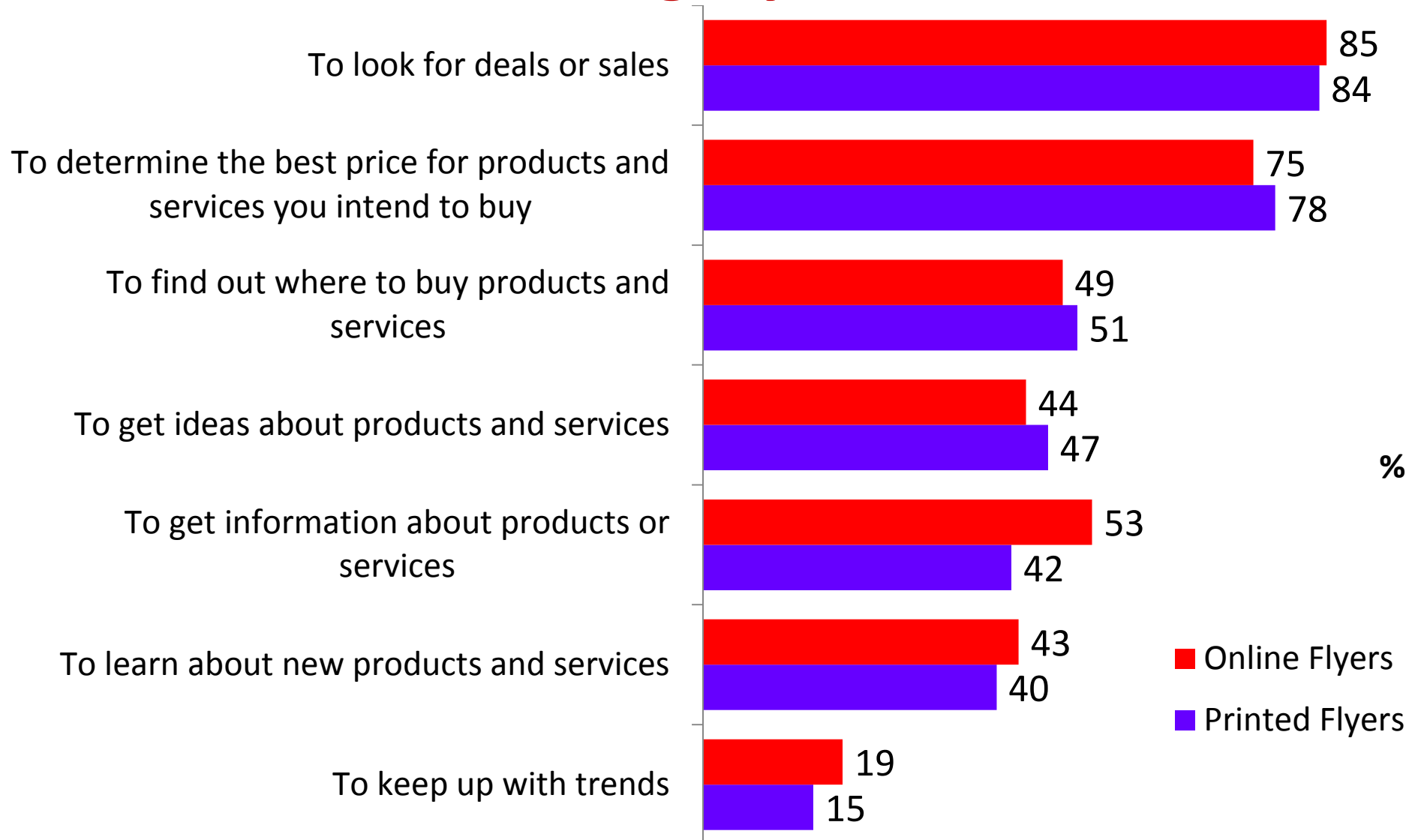
## FDSA Consumer Engagement Study

# 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: How thoroughly do you personally read or look into printed flyers for the following products or services?  
 Source: FDSA 2014 Consumer Engagement Study, Totum Research



## FDSA Consumer Engagement Study

# FLYER DATA BY CATEGORY



# Path to Purchase – Stage 1

## Looking for Information



<i>% Adults 18+</i>	Printed Flyers	Online Flyers	Catalogues	Samples	Coupons
Appliances/Furniture	53	28	22	3	5
Automotive Parts/Service	36	19	10	3	6
Clothing/Accessories	48	29	28	3	8
Computer Hardware/Software	45	36	11	3	6
Entertainment/Restaurants	37	26	4	4	25
Fitness Clubs	17	12	3	3	6
Groceries	75	30	4	17	33
Hardware Products	55	25	16	3	5
Health Care/Personal Care Items	52	21	7	17	19
Home Entertainment Items	49	31	17	3	6
Home Furnishings	52	25	25	3	5
Home Improvements Products/ Services	50	26	14	3	6
Investment/Banking Services	15	15	3	2	3
Other Products/Services	39	24	13	9	12
Sports Equipment	35	20	14	3	6
Wireless Products	35	32	9	3	5

Q: When you are looking for information about groceries/where to purchase groceries/grocery pricing information, which of the listed media do you reference? (2013)

# Thoroughness of Reading



	PRINTED FLYERS			ONLINE FLYERS		
	All/Most	A Few	None	All/Most	A Few	None
		Pages/Skim			Pages/Skim	
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

# Flyer Usage Before Shopping (%)



Category	Ever Use	All/Almost all shopping trips	Most shopping trips	Occasional trip	Never use
Appliances, Furniture, Home Furnishings	68	11	19	38	30
Automotive	53	8	14	32	44
Clothing and Accessories	73	11	23	39	25
Computer Hardware/Software	68	13	20	35	30
Entertainment/Restaurants	68	9	19	40	31
Groceries	90	48	26	16	9
Hardware Products	67	10	20	37	31
Health/Personal Care Items	75	15	25	34	23
Home Entertainment	66	12	19	36	32
Home Improvement	67	10	19	38	31
Sports Equipment	54	8	15	31	44
Travel and Tourism	51	9	15	27	47
Wireless Products	56	9	14	32	42

Question: Please indicate how often you use flyers before shopping for each of the following products categories.

Source: FDSA Consumer Engagement Study, Totum Research



## FDSA Consumer Engagement Study

# GROCERY FLYERS

# Grocery Category – Path to Purchase



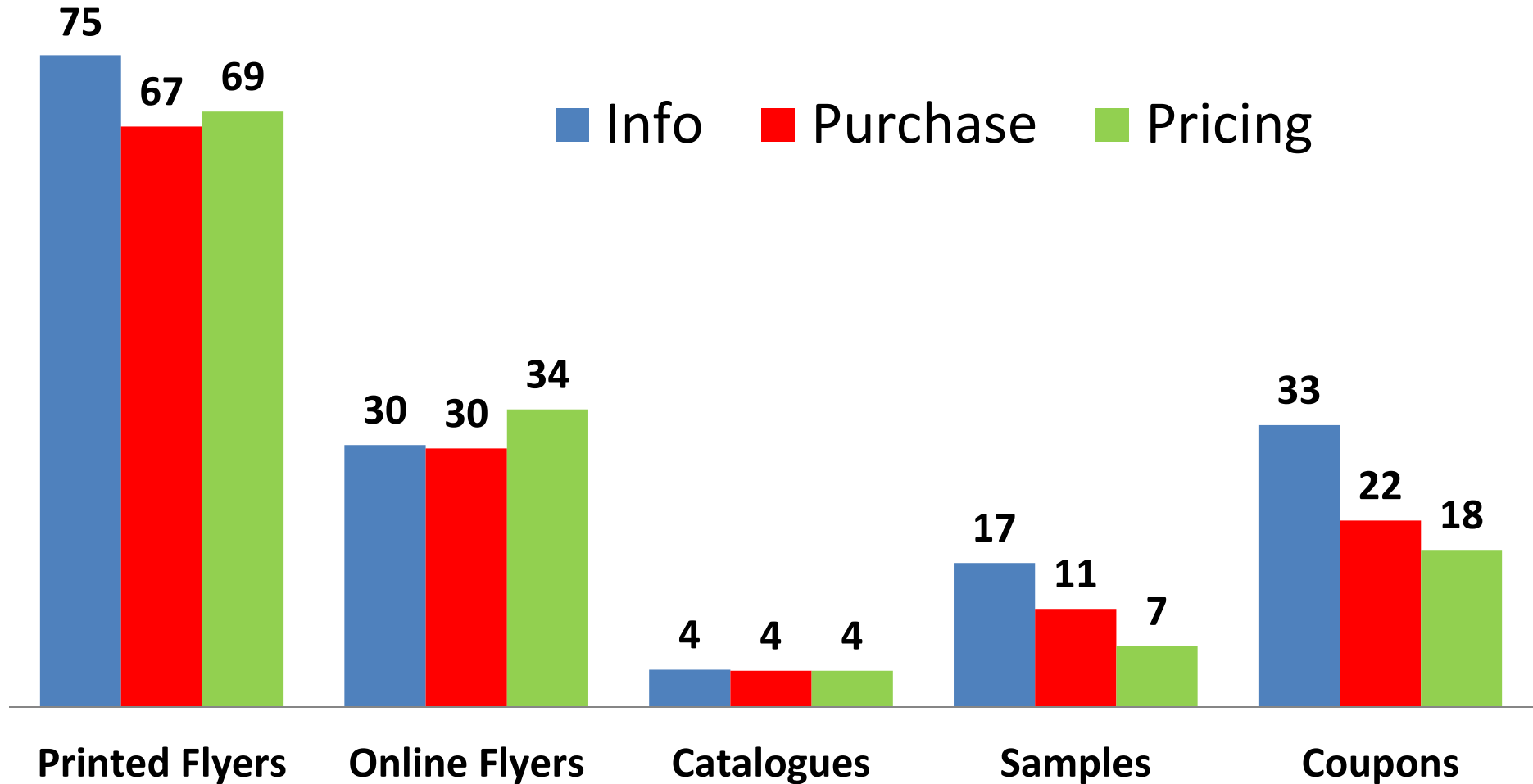
Printed flyers still dominate in the Grocery category, with **75%** usage among Canadians looking for grocery information.

More than two thirds of adults are also using printed flyers for pricing (**67%**) and store locations (**69%**).

# Path to Purchase Grocery Category



% Adults 18+



Q: When you are looking for information about groceries/where to purchase groceries and pricing information, which of the listed media do you reference? (2013)

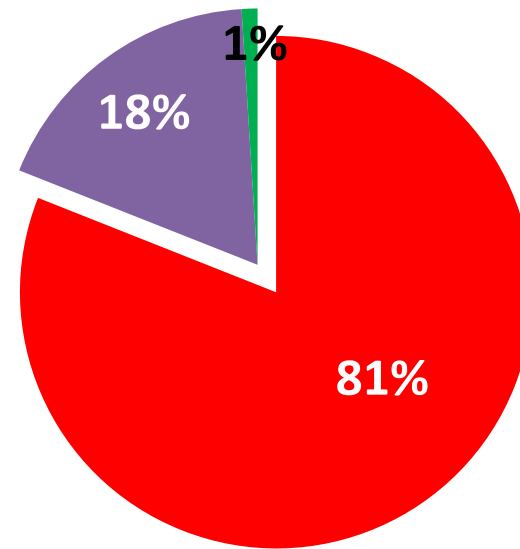
Source: FDSA Consumer Engagement Study, Totum Research

# Thoroughness of Reading

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

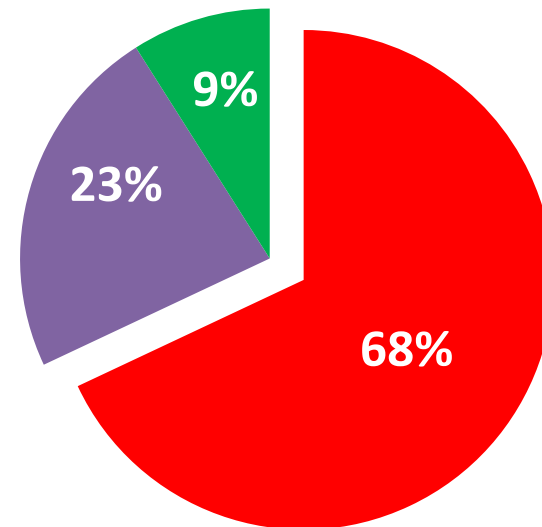
- **57%** are female.
- **70%** are married.
- **90%** are looking for deals or sales.
- **80%** are looking for the best price.
- **57%** prefer to have flyers delivered to their door.
- **88%** visited a store within the week and purchased a product.

## Printed Flyers

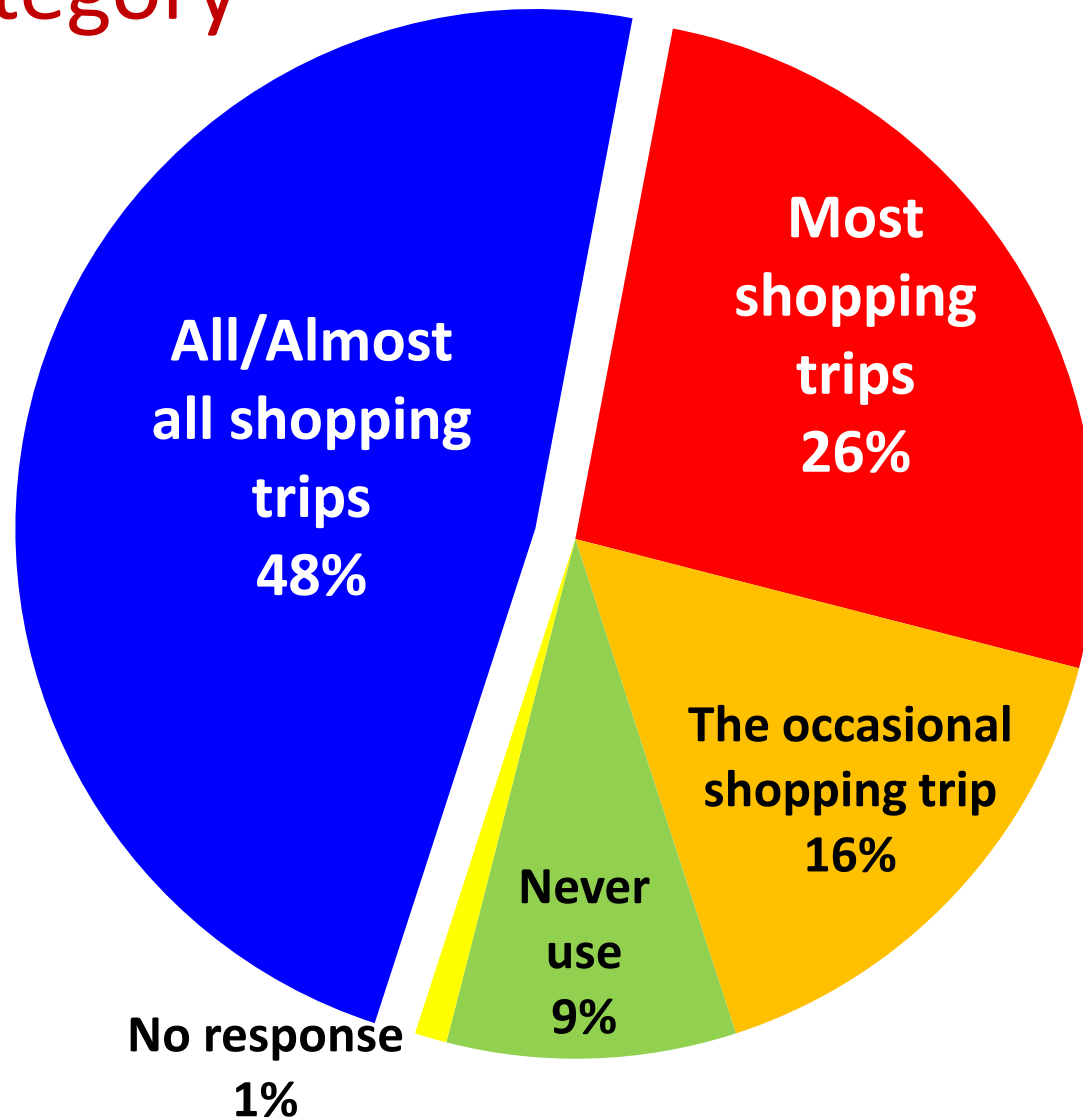


■ All/Most ■ A Few Pages/Skim ■ None

## Online Flyers



# Using Flyers before Shopping Grocery Category



Question: Please indicate how often you use flyers before shopping for each of the following products categories?  
Source: FDSA Consumer Engagement Study, Totum Research





## FDSA Consumer Engagement Study

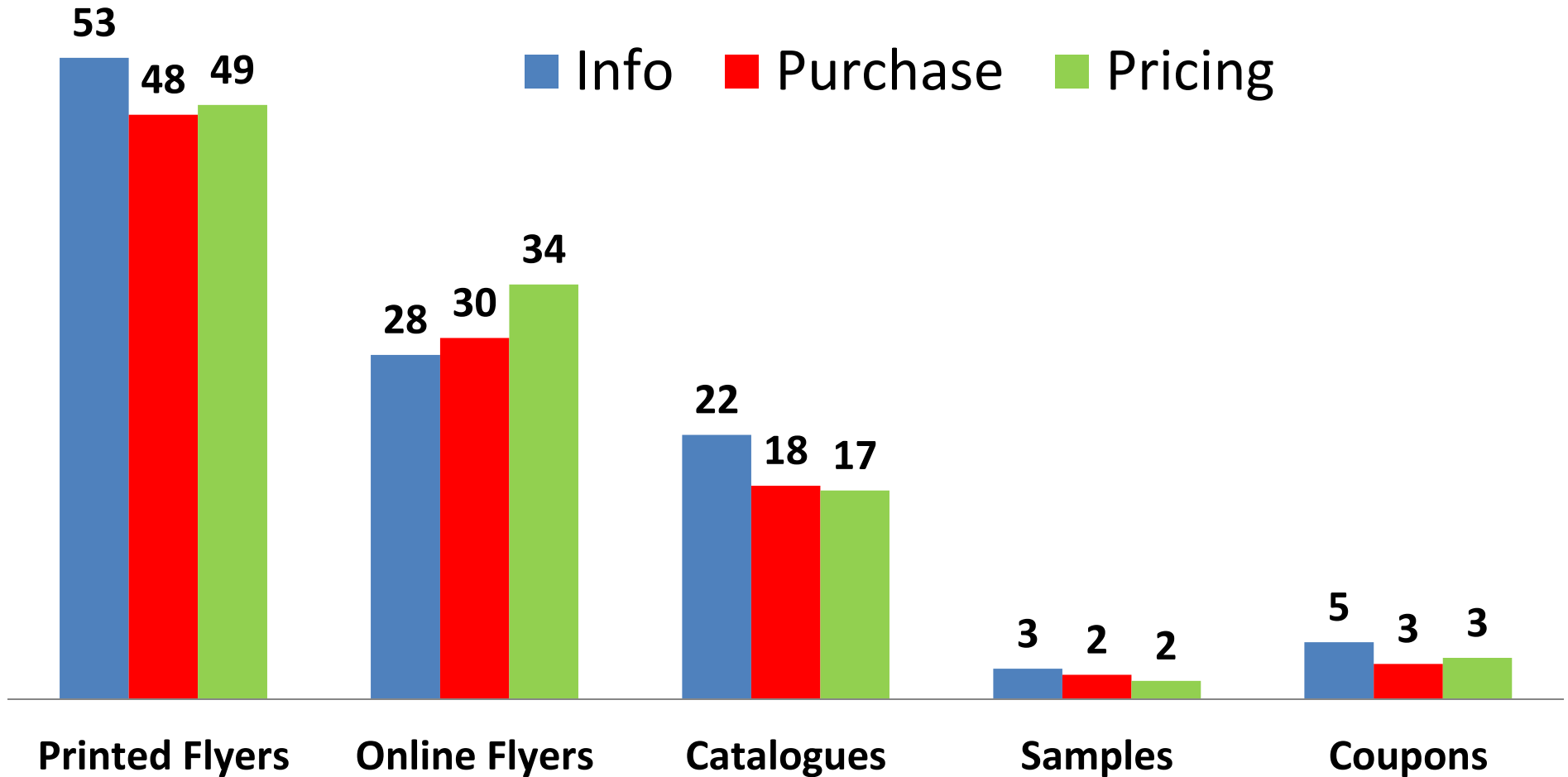
# APPLIANCES, FURNITURE, HOME FURNISHINGS

# Path to Purchase

## Appliances and Furniture Category



% Adults 18+



Q: When you are looking for information about appliances/furniture/where to purchase appliances/furniture and pricing information, which of the listed media do you reference? (2013)

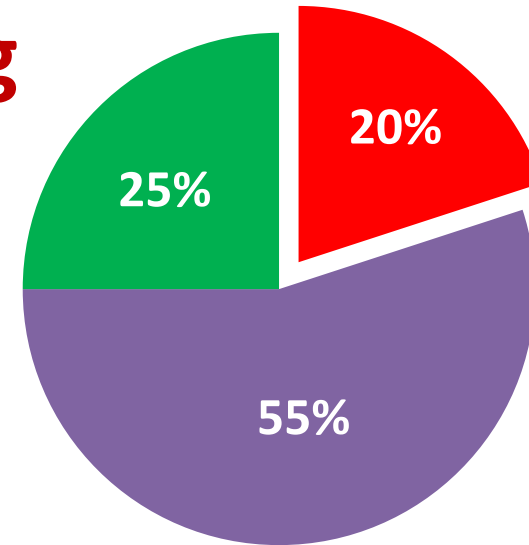
Source: FDSA Consumer Engagement Study, Totum Research

# Thoroughness of Reading

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

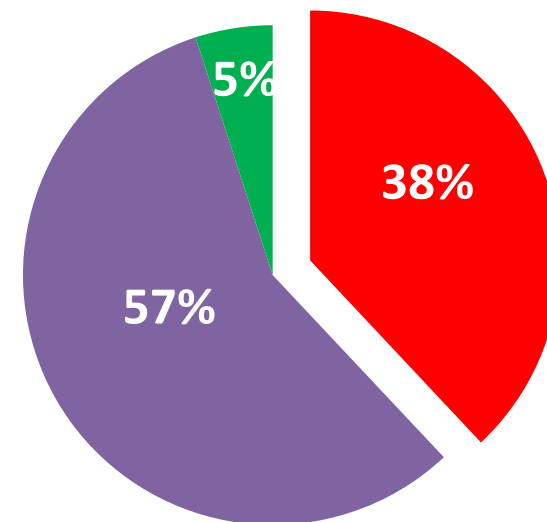
- **49%** are female.
- **78%** are married.
- **76%** are looking for deals or sales.
- **60%** are looking for information.
- **37%** prefer to have flyers delivered to their PC In Box.
- **79%** purchased a product online or in a store.

## Printed Flyers



■ All/Most ■ A Few Pages/Skim ■ None

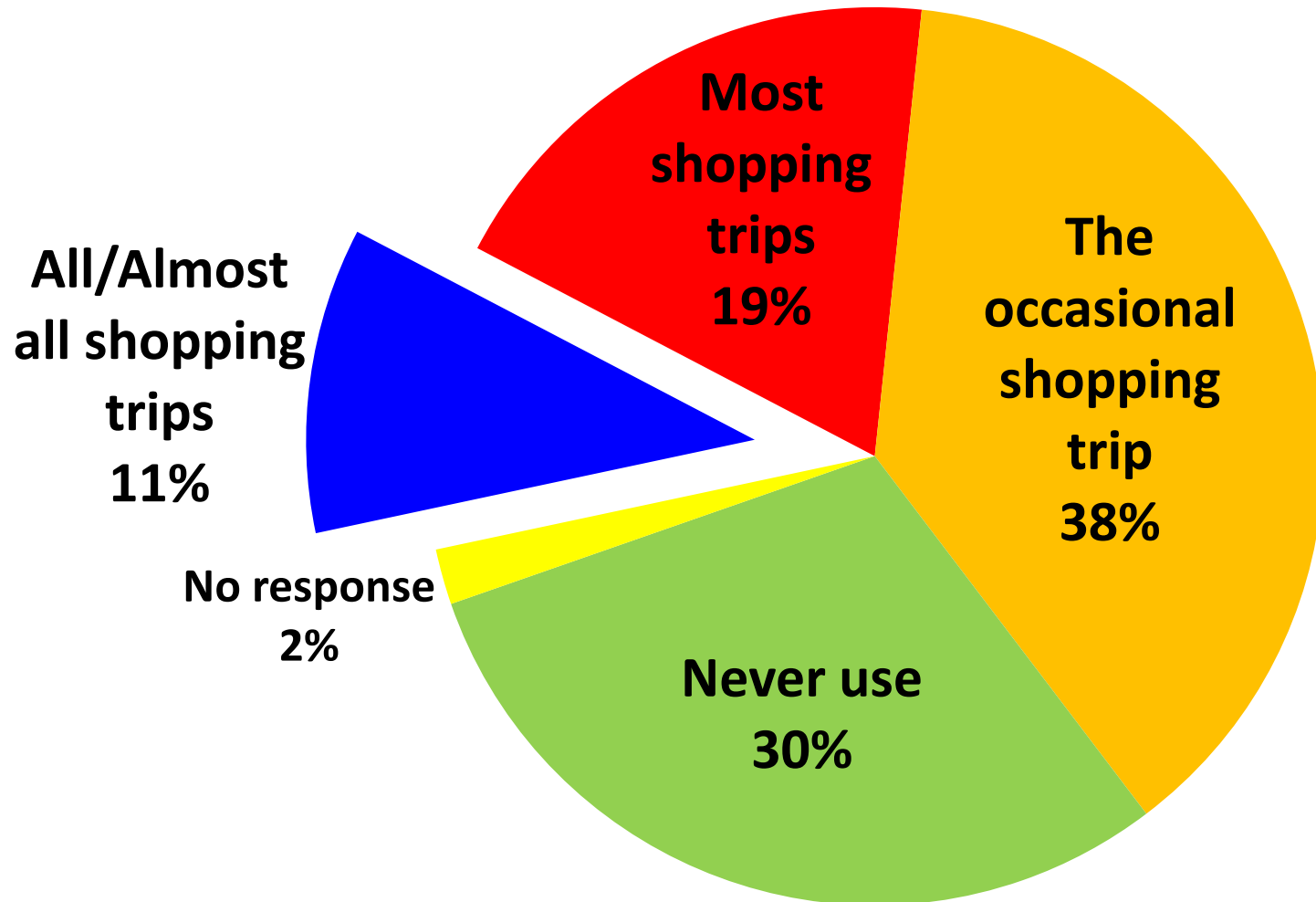
## Online Flyers





**Seven out of ten consumers (68%)  
reported using flyers before shopping  
for Appliances, Furniture or Home  
Furnishings.**

# Using Flyers before Shopping Appliances, Furniture, Home Furnishings



Question: Please indicate how often you use flyers before shopping for each of the following products categories.?

Source: FDSA Consumer Engagement Study, Totum Research



FLYER DISTRIBUTION  
STANDARDS ASSOCIATION

# FDSA Consumer Engagement Research



Totum Research Inc<sup>8</sup>