



FLYER DISTRIBUTION  
STANDARDS ASSOCIATION

# 2015 FDASA Consumer Engagement Study



*Totum Research Inc*

# Objectives



- Measure usage of printed flyers, online flyers, catalogues, samples and coupons.
- Find out Canadians' preferred method of receipt of printed flyers, online flyers and coupons.
- Establish actions taken as a result of viewing a flyer.
- Determine frequency of printed and online flyer usage compared with a year ago.
- Measure frequency of flyer usage by product category.
- Break out results by demographic category.

# Study Design

- An online study was conducted in Canada using the Uthink Online panel.
- Invitation blasts were sent out on 16 October 2014 and fieldwork was completed on 30 October 2014.
- 2,461 adults completed the interview.
- Regional, age, language and gender targets were applied to ensure reasonable representation.
  - Respondents were equally divided between men and women
  - Four regions were included – West, Ontario, Québec and Atlantic Canada
  - Respondents were interviewed in each of three community sizes – 400,000+, 100,000 to 400,000 and less than 100,000
  - 75% were English and 25% French-speaking
  - At least 40% of the respondents were aged 35 – 54
  - Weighting was conducted in the final analysis so the sample conformed to national representation.



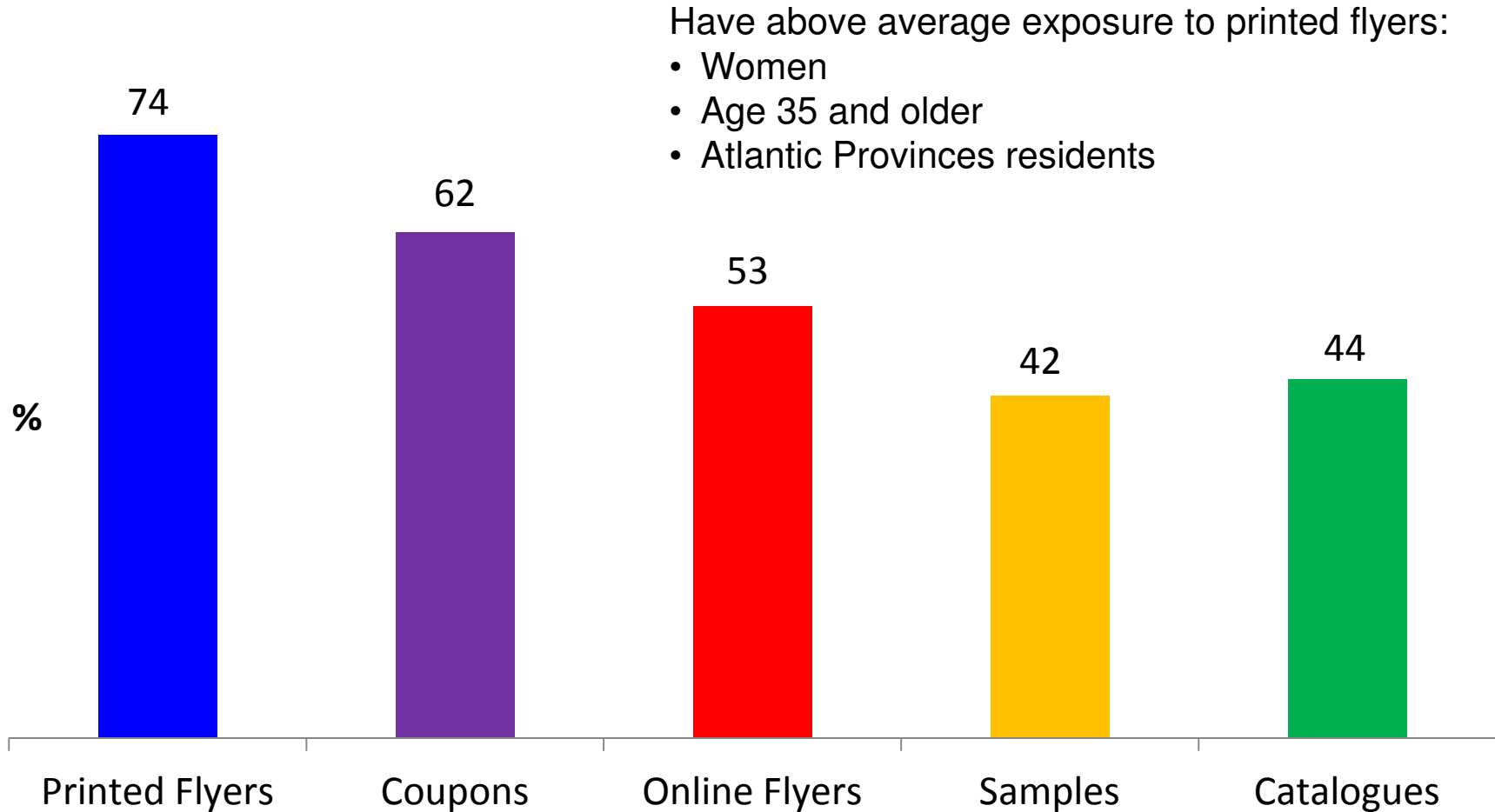
## FDSA 2015 Consumer Engagement Study

# FLYER USAGE AND READERSHIP



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

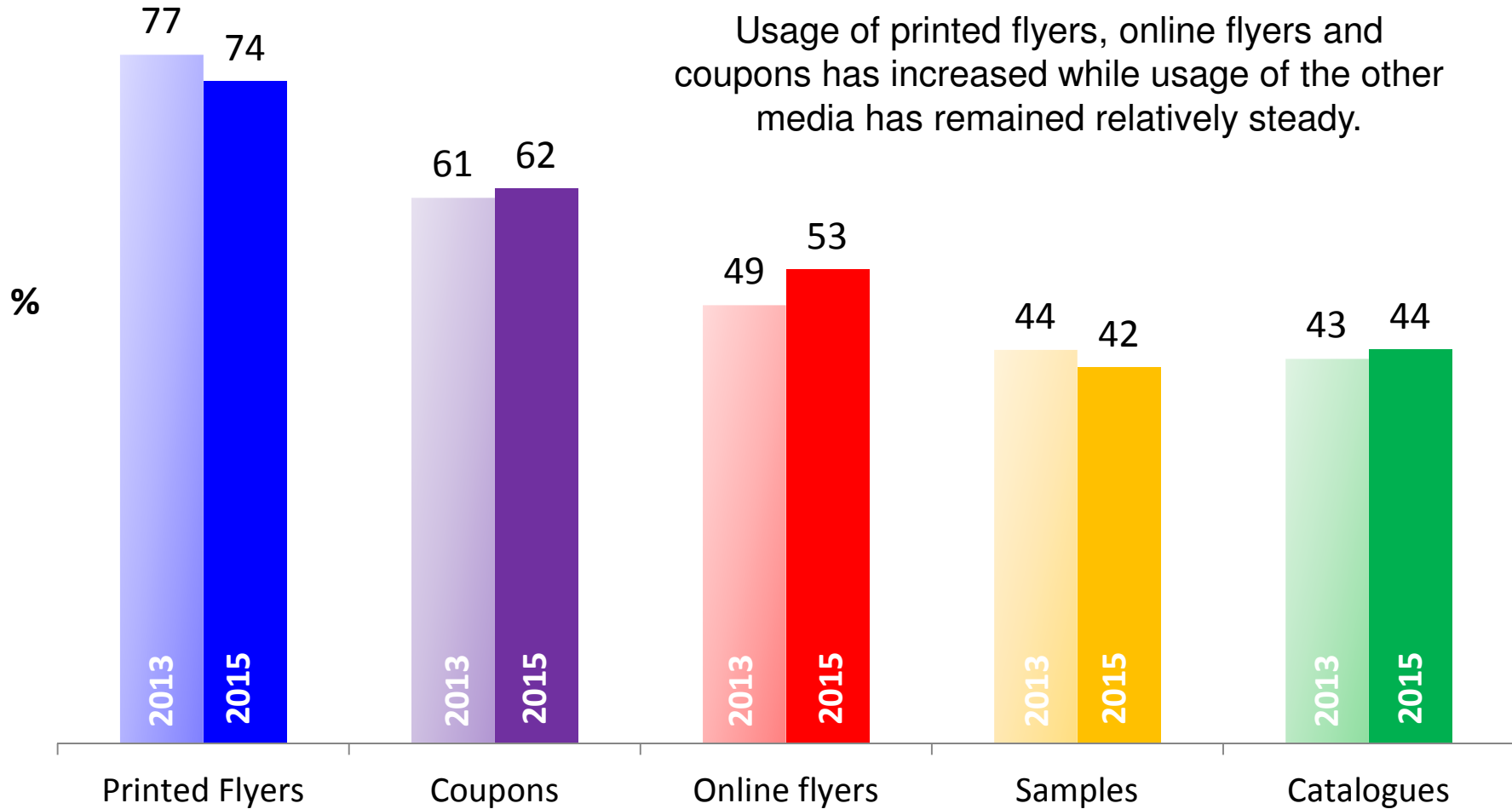
# More People are Exposed to Printed Flyers than to other Flyer Media



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

Source: FDSA 2015 Consumer Engagement Study, Totum Research

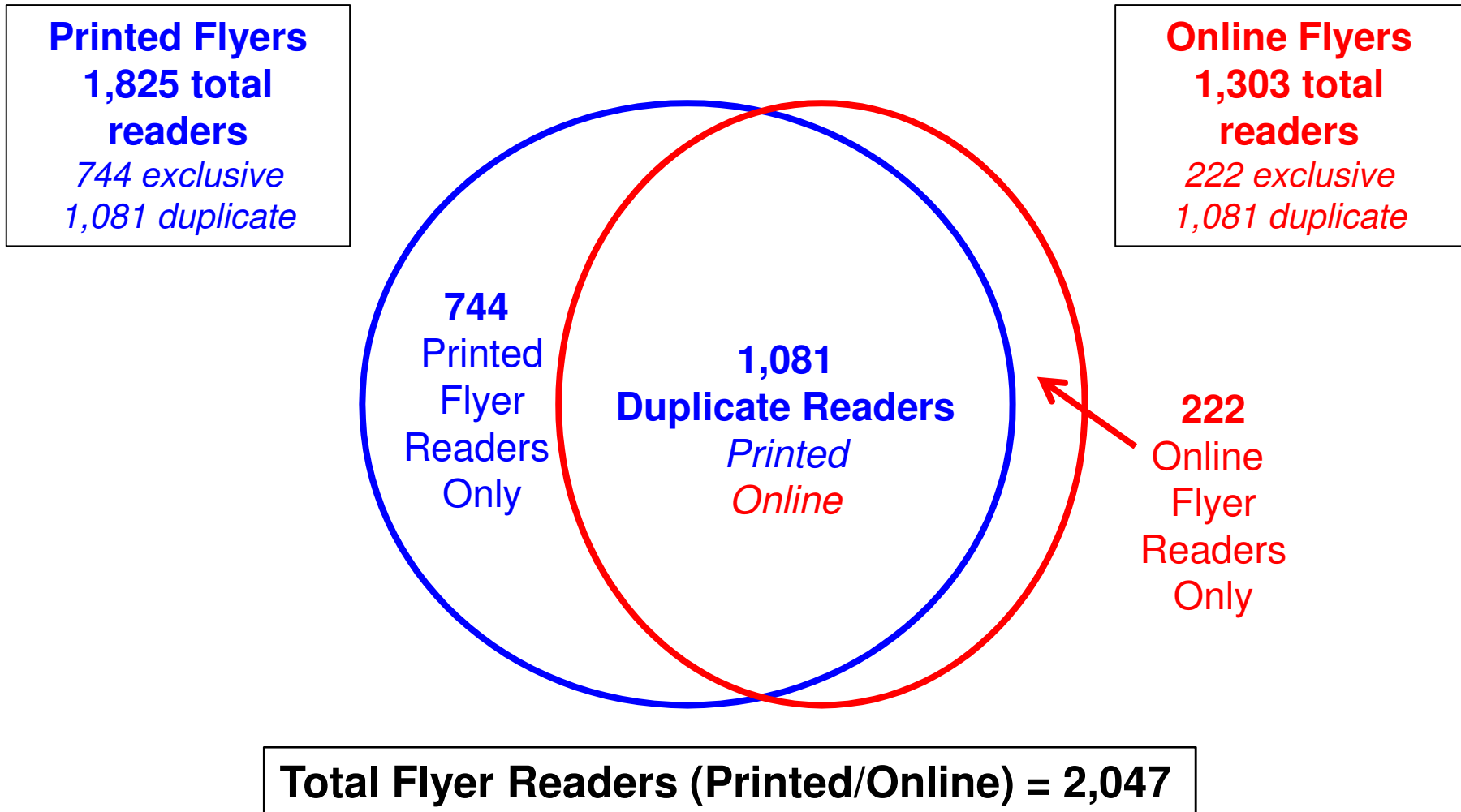
# Flyer Media Trending



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

Source: FDSA 2015 Consumer Engagement Study, Totum Research

# Duplicate and Exclusive Printed and Online Flyers





# Flyer Usage by Region



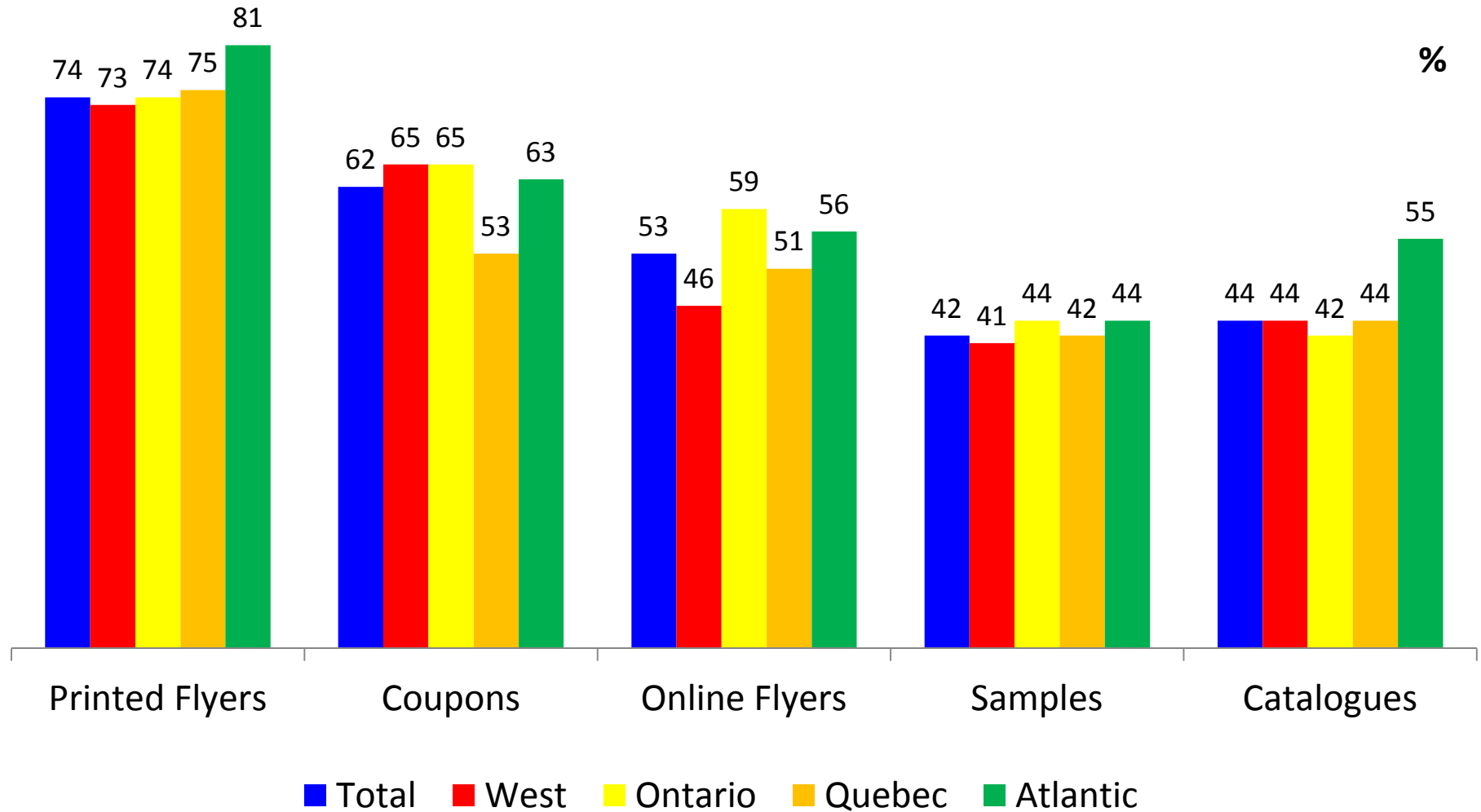
Ontario indexes above average for online flyer usage.  
Samples index highest in Ontario and Atlantic.

%	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 2015 Consumer Engagement Study, Totum Research

# Flyer Media Usage by Region

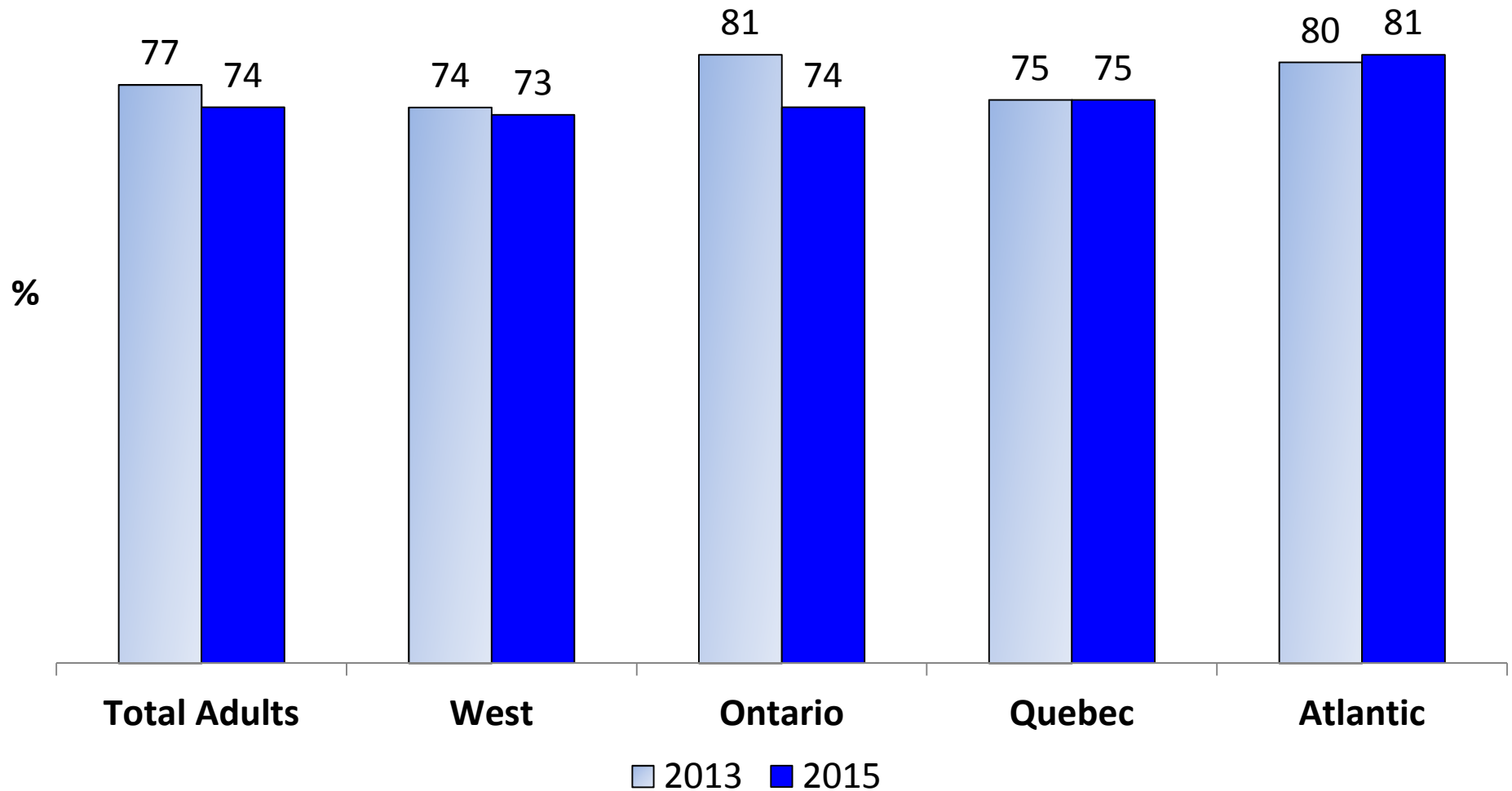


Question: Which of the following do you read, look into or access?

Source: FDSA 2015 Consumer Engagement Study, Totum Research

# Printed Flyer Usage by Region

## 2015 vs. 2013

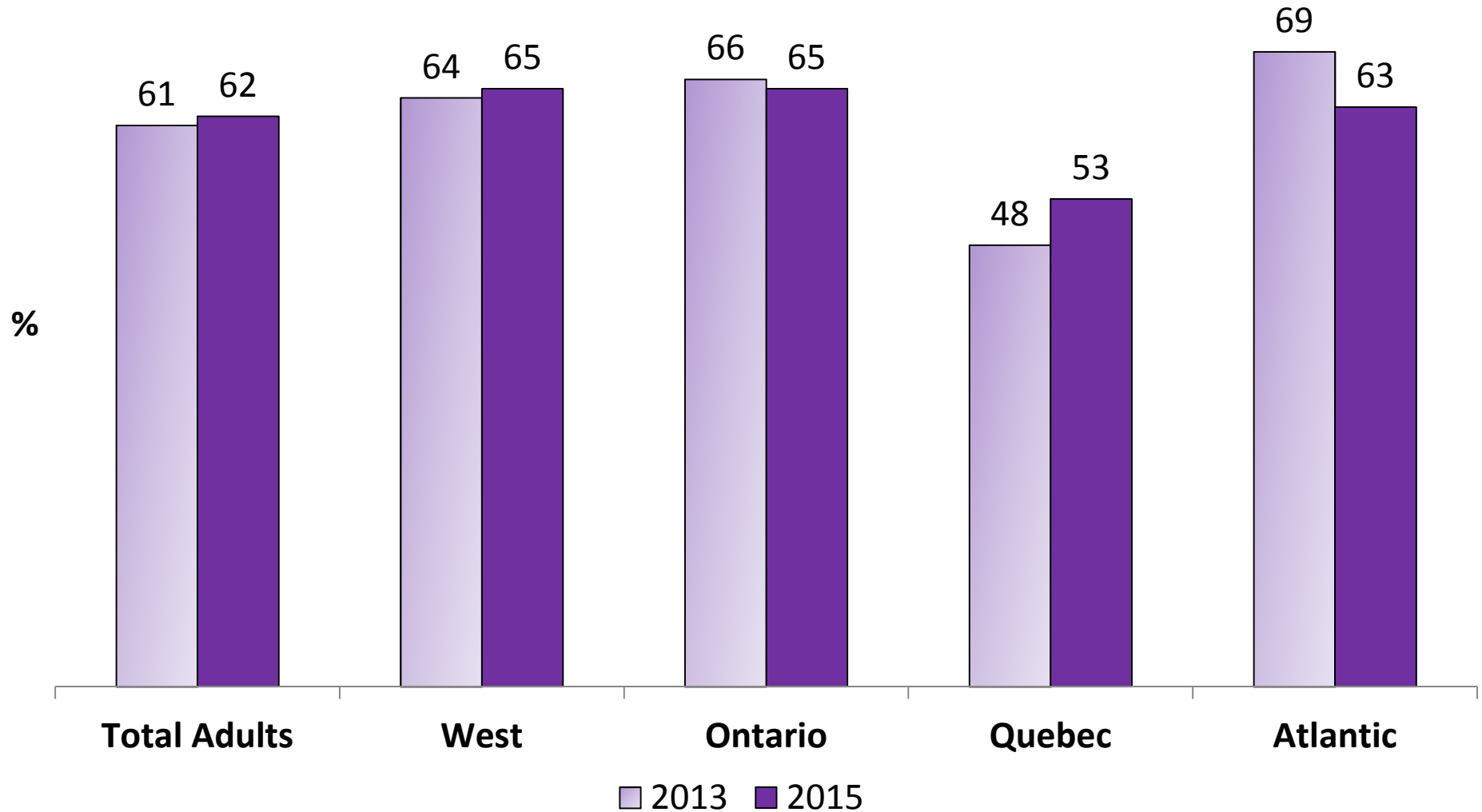


Question: Which of the following do you read, look into or access?

Source: FDSA 2015 Consumer Engagement Study, Totum Research

# Coupon Usage by Region

## 2015 vs. 2013

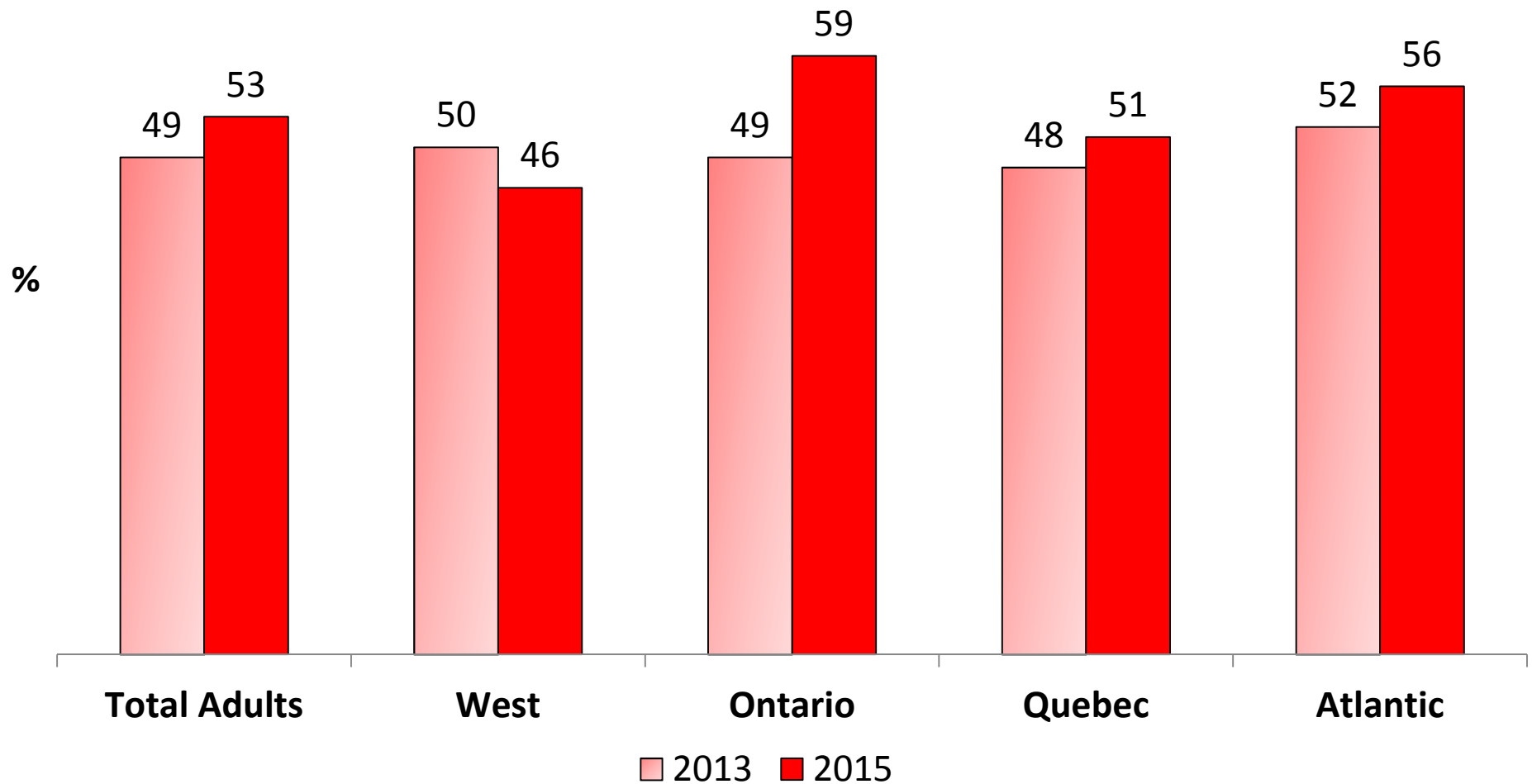


Question: Which of the following do you read, look into or access?

Source: FDSA 2015 Consumer Engagement Study, Totum Research

# Online Flyer Usage by Region

## 2015 vs. 2013

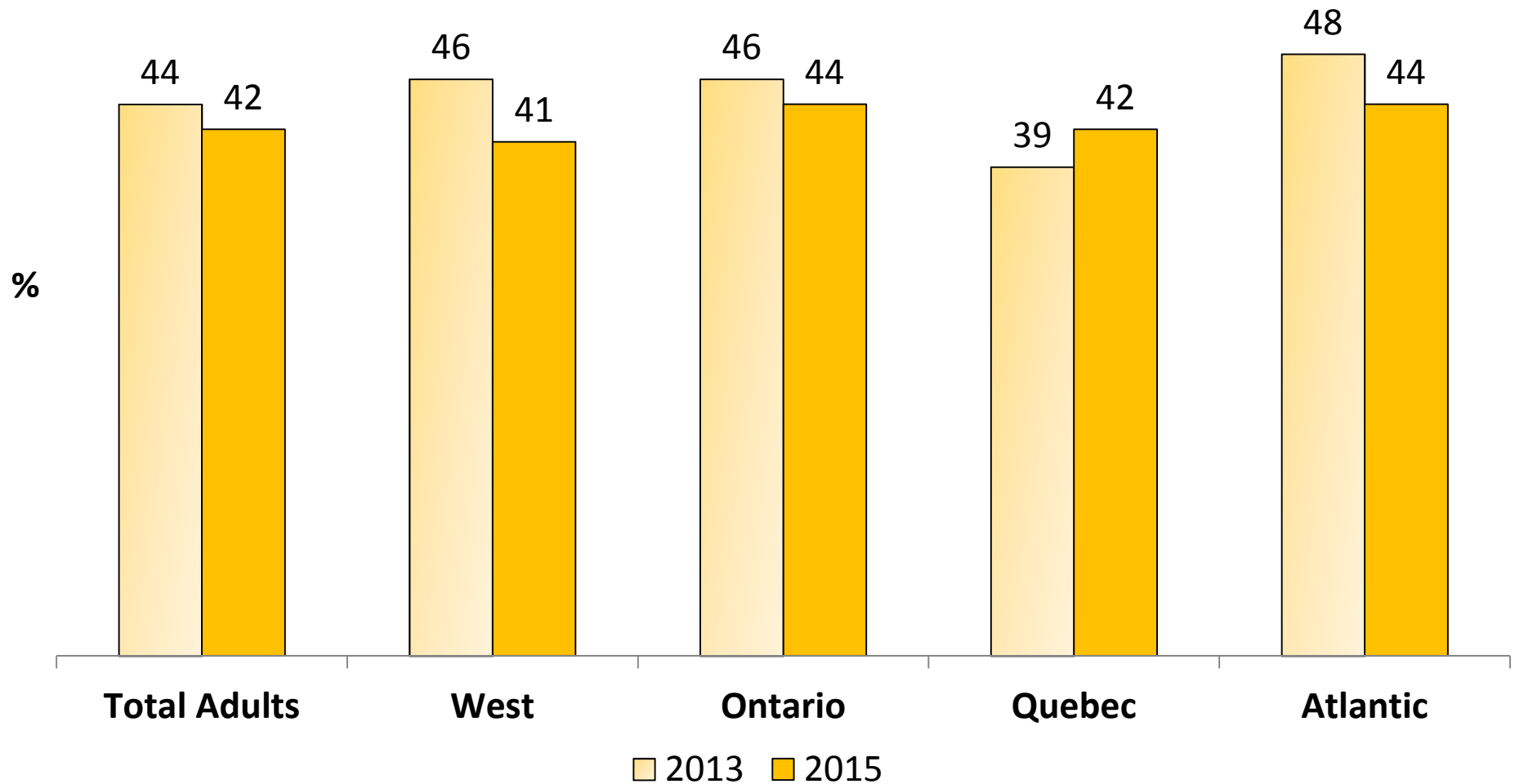


Question: Which of the following do you read, look into or access?

Source: FDSA 2015 Consumer Engagement Study, Totum Research

# Sample Usage by Region

## 2015 vs. 2013

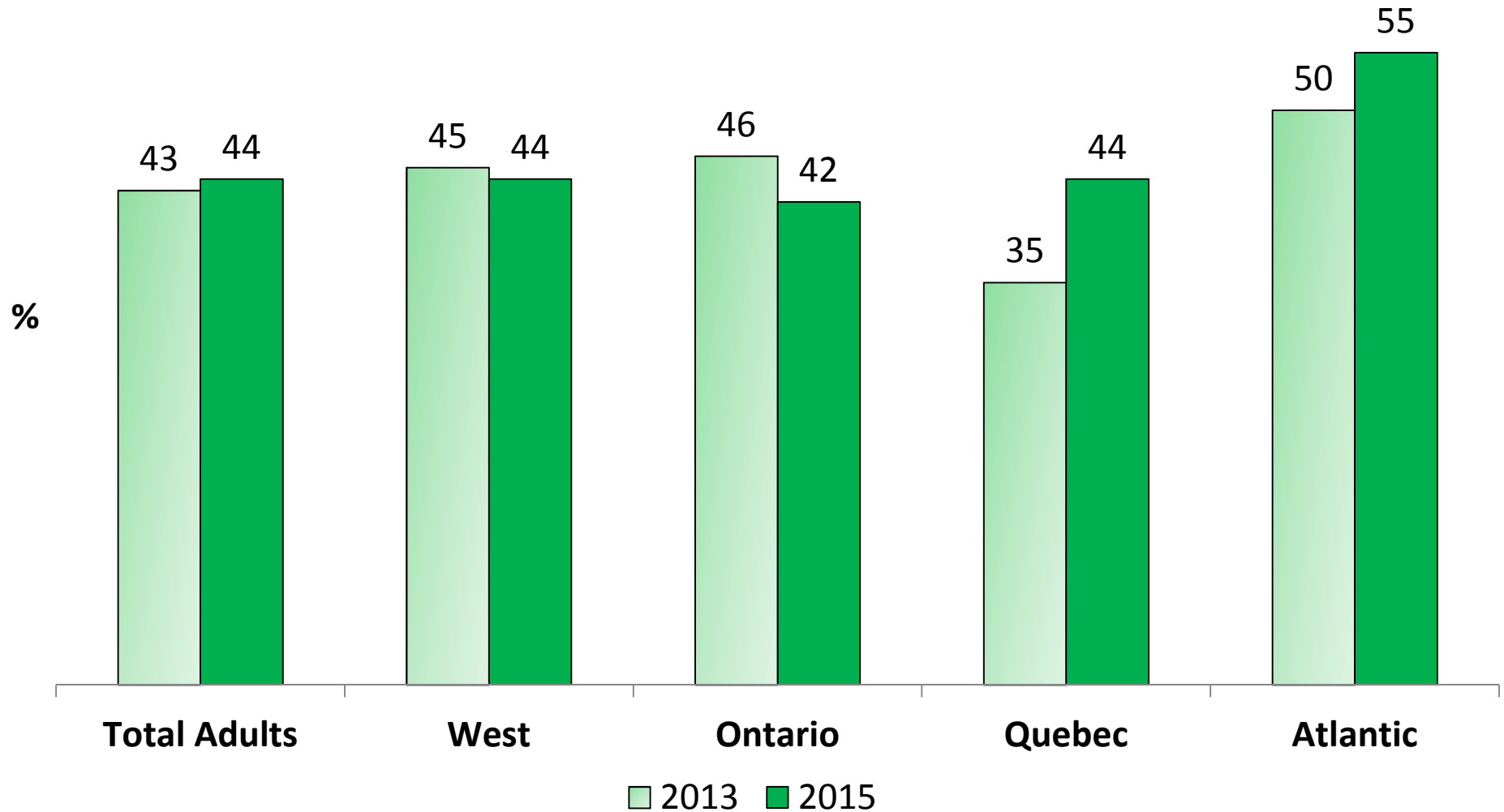


Question: Which of the following do you read, look into or access?

Source: FDSA 2015 Consumer Engagement Study, Totum Research

# Catalogue Usage by Region

## 2015 vs. 2013



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

Source: FDSA 2015 Consumer Engagement Study, Totum Research



## FDSA 2015 Consumer Engagement Study

# FREQUENCY OF FLYER USAGE

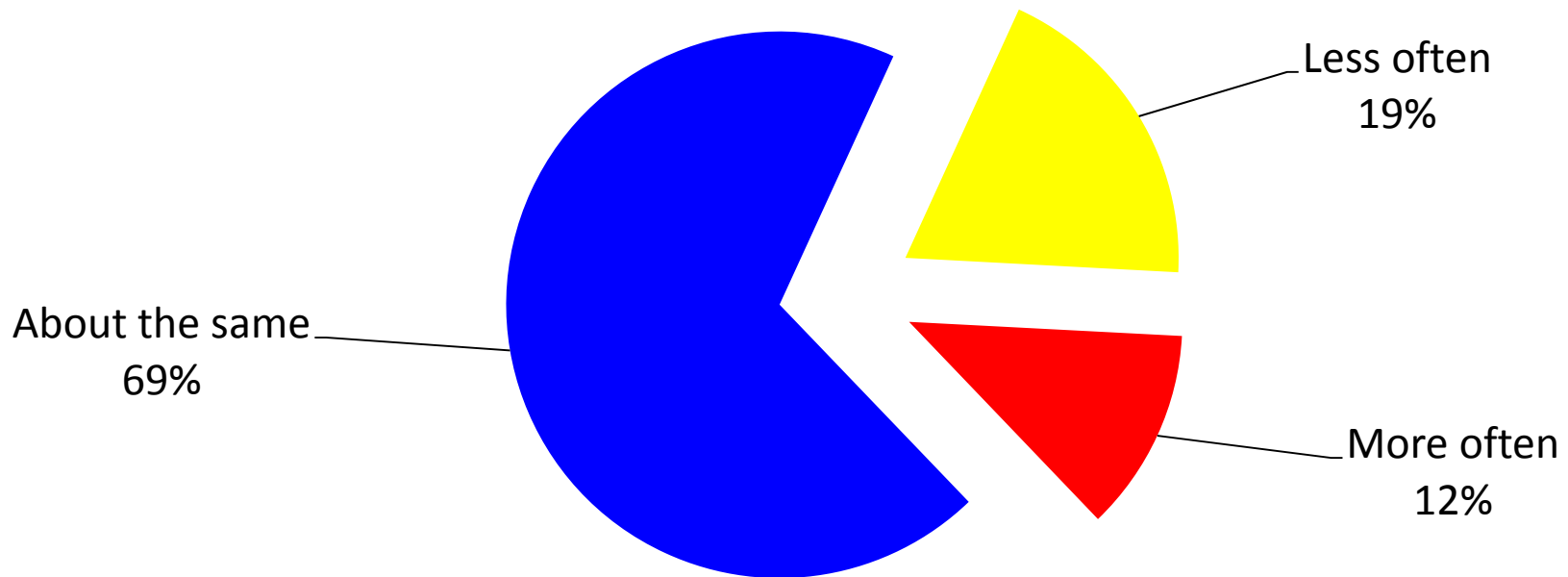


# Frequency of Using Printed Flyers vs. a Year Ago



Most likely to use printed flyers more than a year ago:

- Families
- Young adults (<35 years old)



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

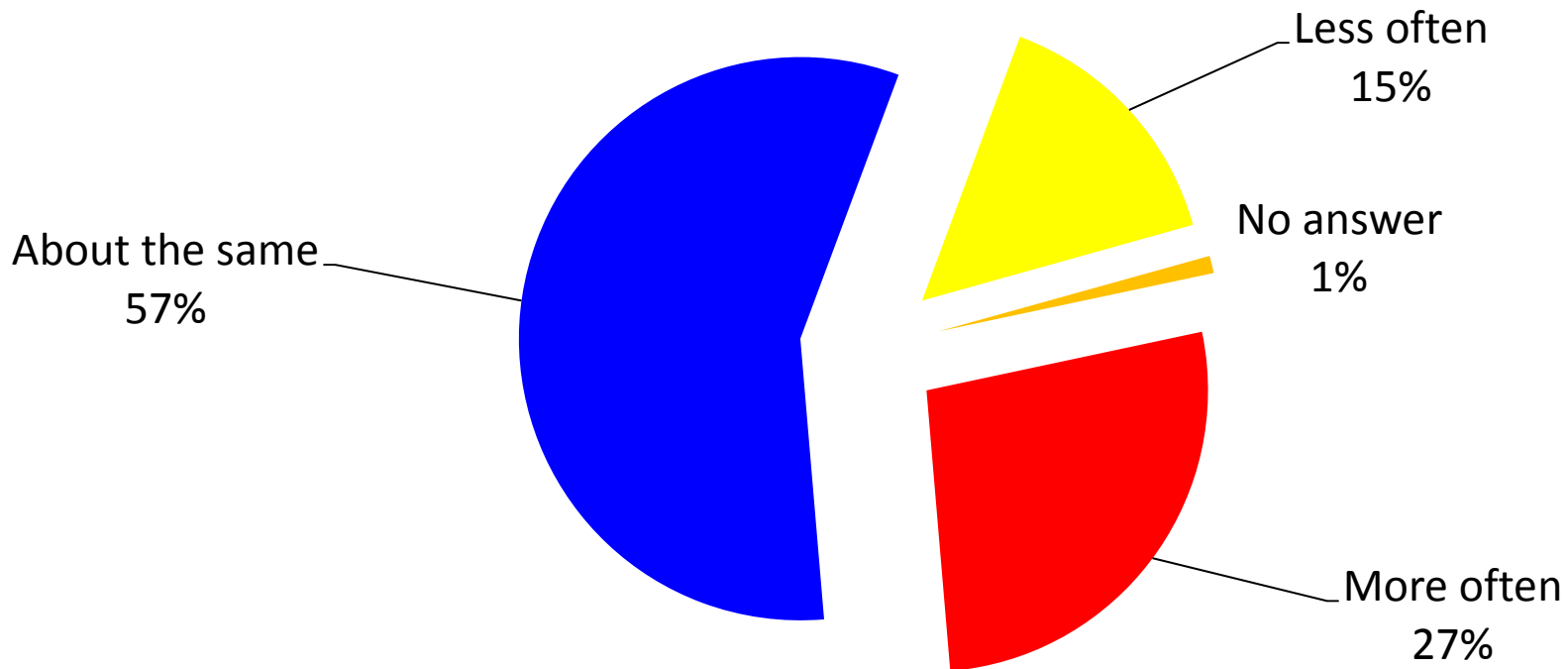
Source: FDSA 2015 Consumer Engagement Study, Totum Research

# Frequency of Using Online Flyers vs. a Year Ago



Most likely to use online flyers more than a year ago:

- English
- Women
- Families
- Employed
- Living in Ontario



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

Source: FDSA 2015 Consumer Engagement Study, Totum Research



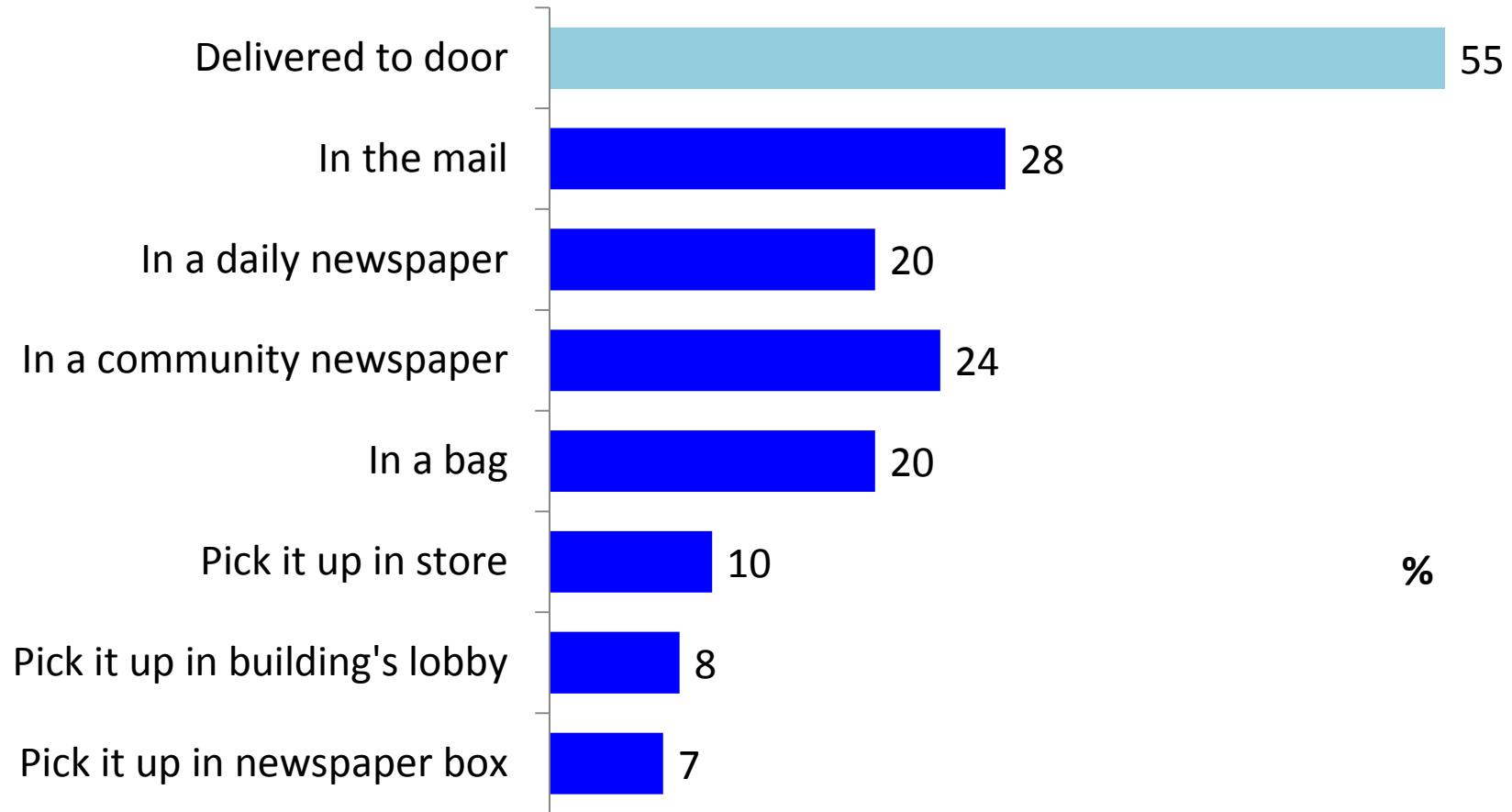
## FDSA 2015 Consumer Engagement Study

# PREFERRED METHOD OF RECEIPT

# Preferred Way to Receive Printed Flyers



The clear preference is for any method that does not involve effort on the part of the consumer.



N.B. Because duplication of response was allowed, it is likely that “Delivered to door” includes delivered to the door in a newspaper.

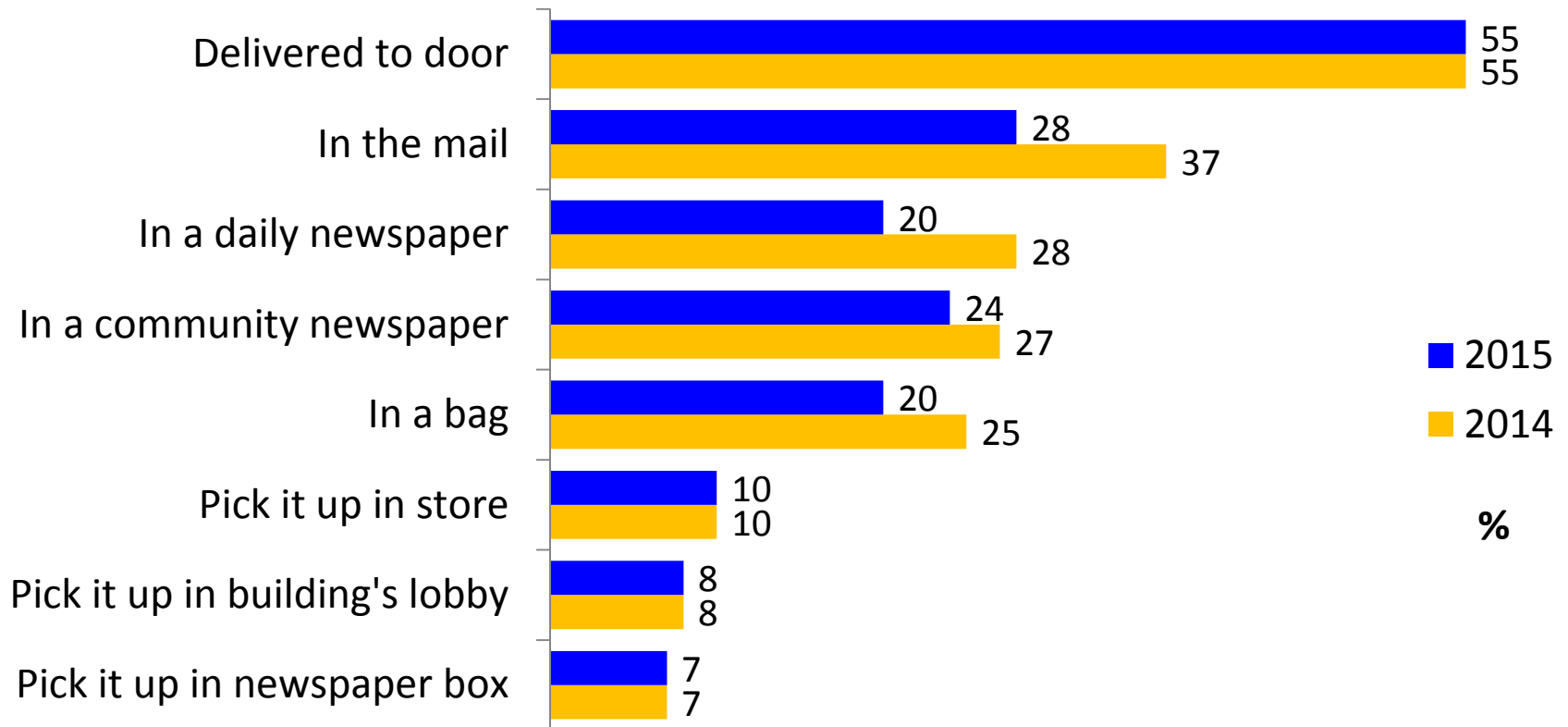
Question: How would you prefer to receive your printed flyers?

Source: FDSA 2015 Consumer Engagement Study, Totum Research

# Preferred Way to Receive Printed Flyers 2015 vs. 2014



Preference for receiving flyers in the mail, in a daily newspaper and in a bag has decreased in the past year.

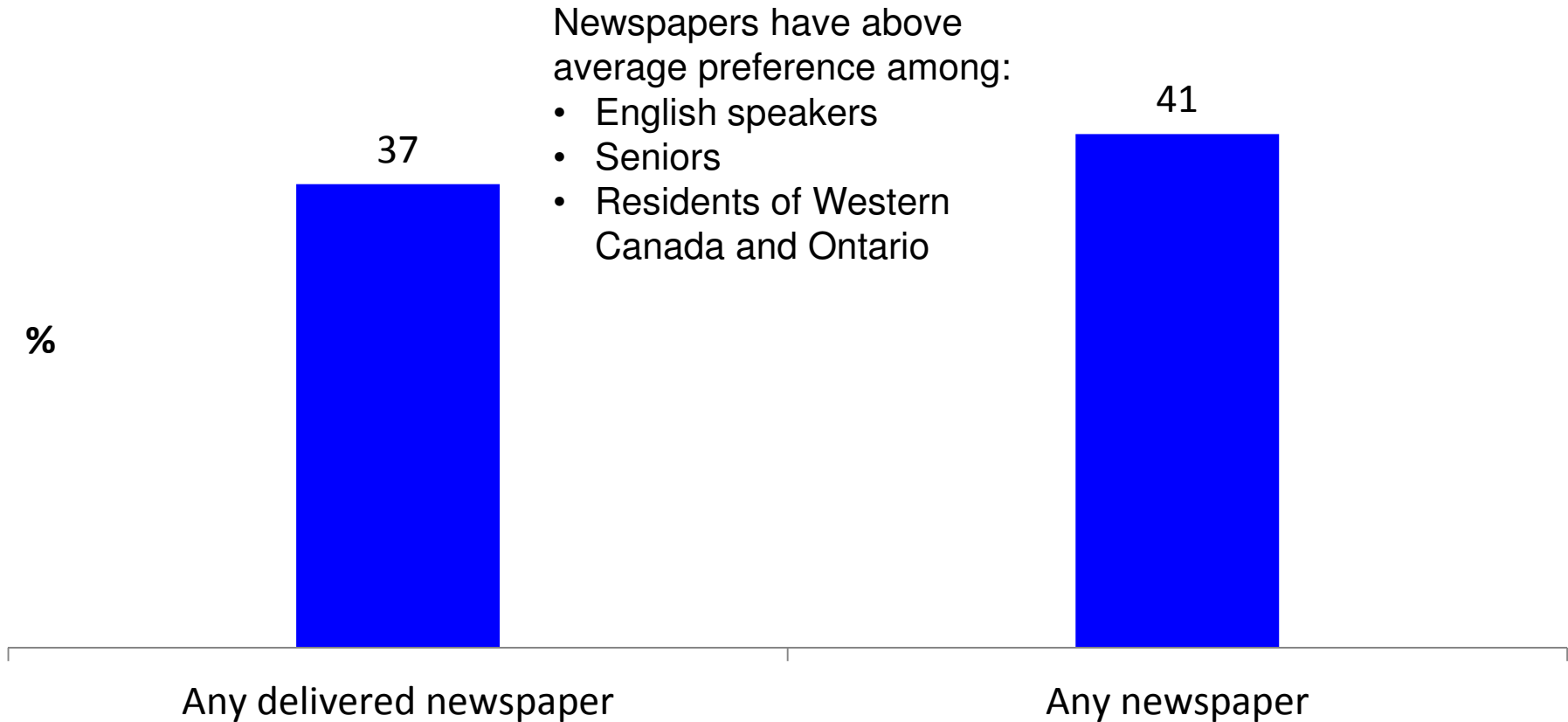


N.B. Because duplication of response was allowed, it is likely that “Delivered to door” includes delivered to the door in a newspaper.

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

Source: FDSA 2015 Consumer Engagement Study, Totum Research

# Preferred Way to Receive Printed Flyers – Newspaper Summary



Newspapers have above average preference among:

- English speakers
- Seniors
- Residents of Western Canada and Ontario

%

Any delivered newspaper

Any newspaper

“Any delivered newspaper” includes “In a community newspaper” and/or “In a daily newspaper”.

“Any newspaper” includes “In a community newspaper” and/or “Pick it up at a newspaper box” and/or “In a daily newspaper”.

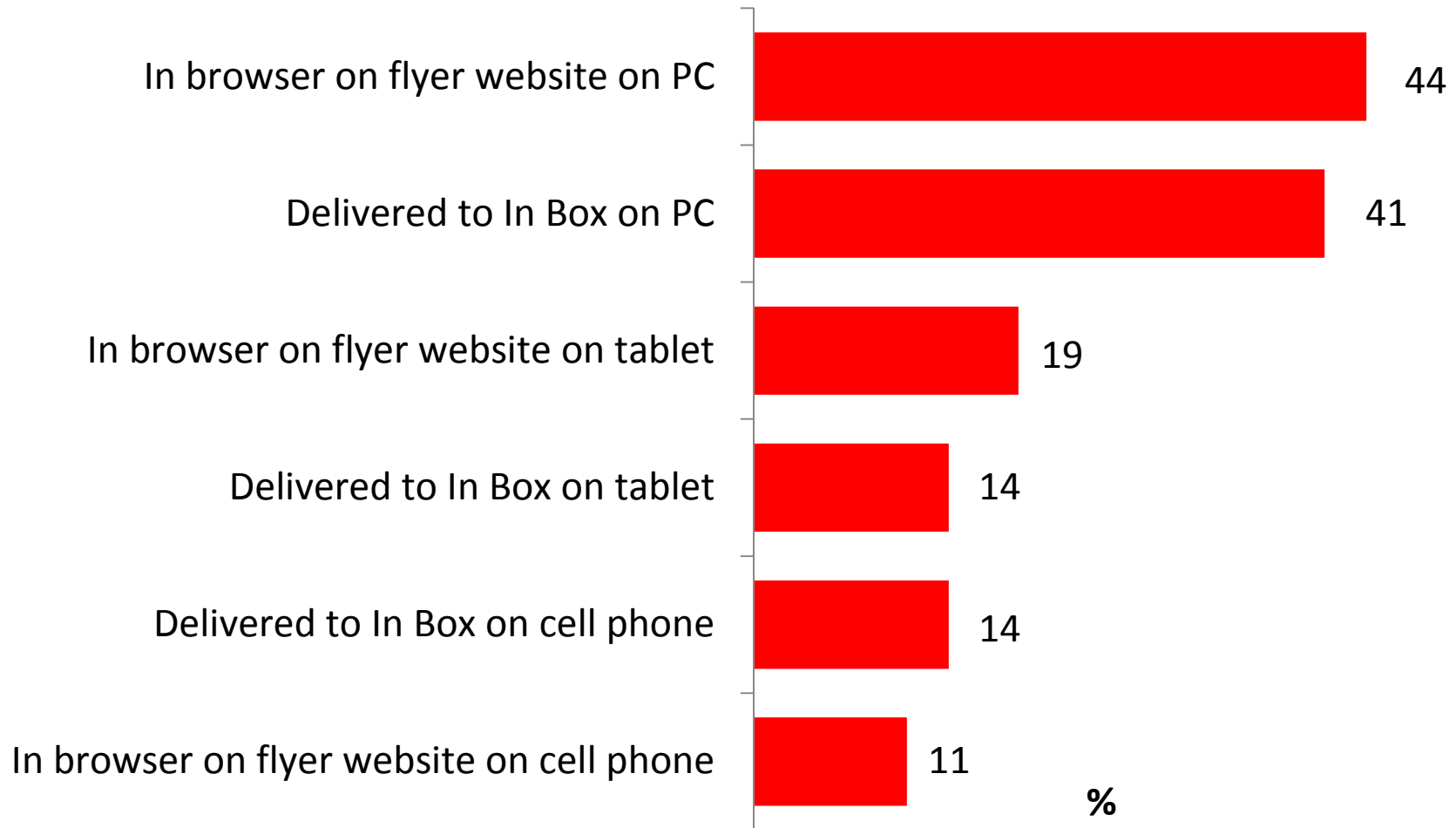
Question: How would you prefer to receive your printed flyers?

Source: FDSA 2015 Consumer Engagement Study, Totum Research

# Preferred Way to Receive Online Flyers



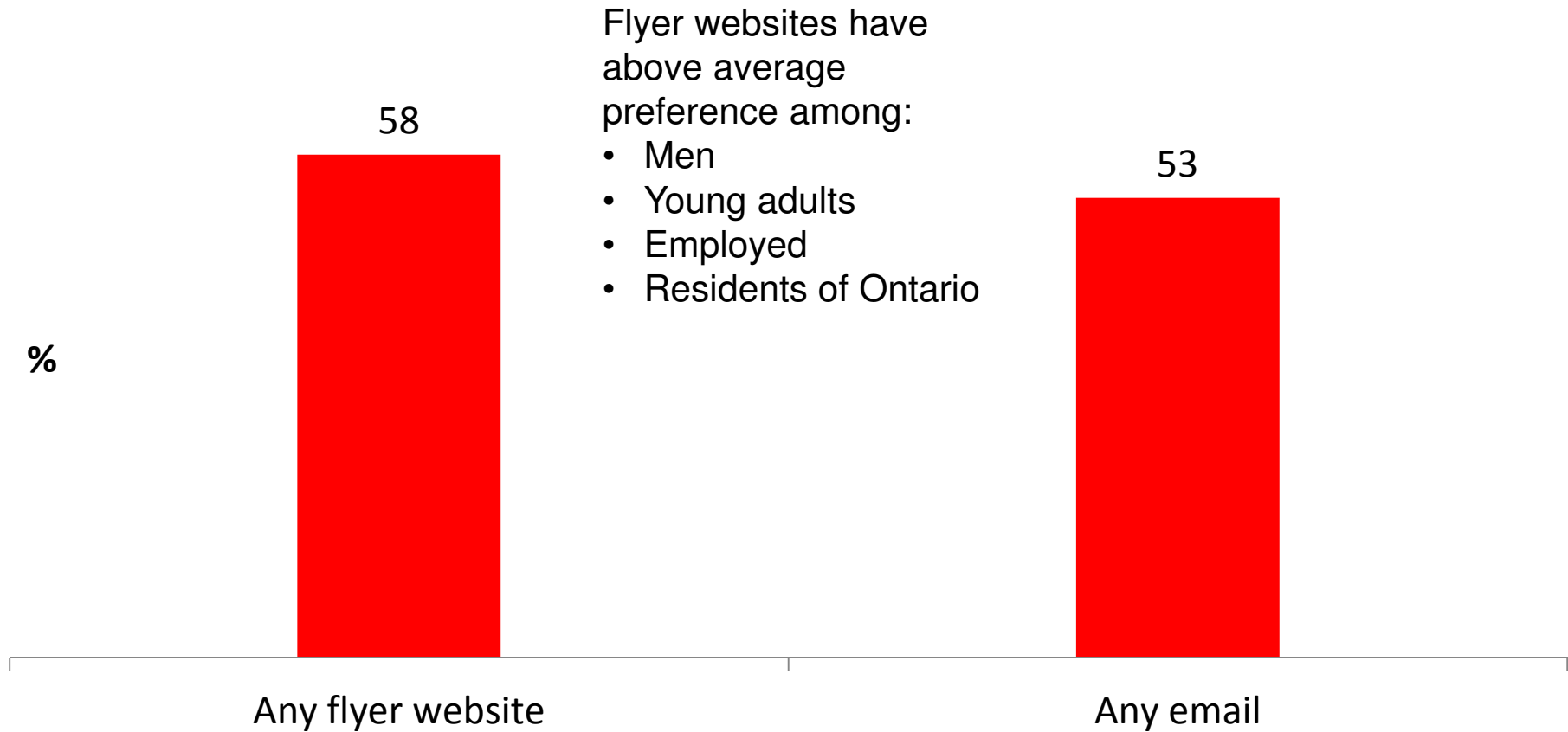
The clear preference is for receipt on a personal computer.



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

Source: FDSA 2015 Consumer Engagement Study, Totum Research

# Preferred Way to Receive Online Flyers – Media Summary



Flyer websites have above average preference among:

- Men
- Young adults
- Employed
- Residents of Ontario

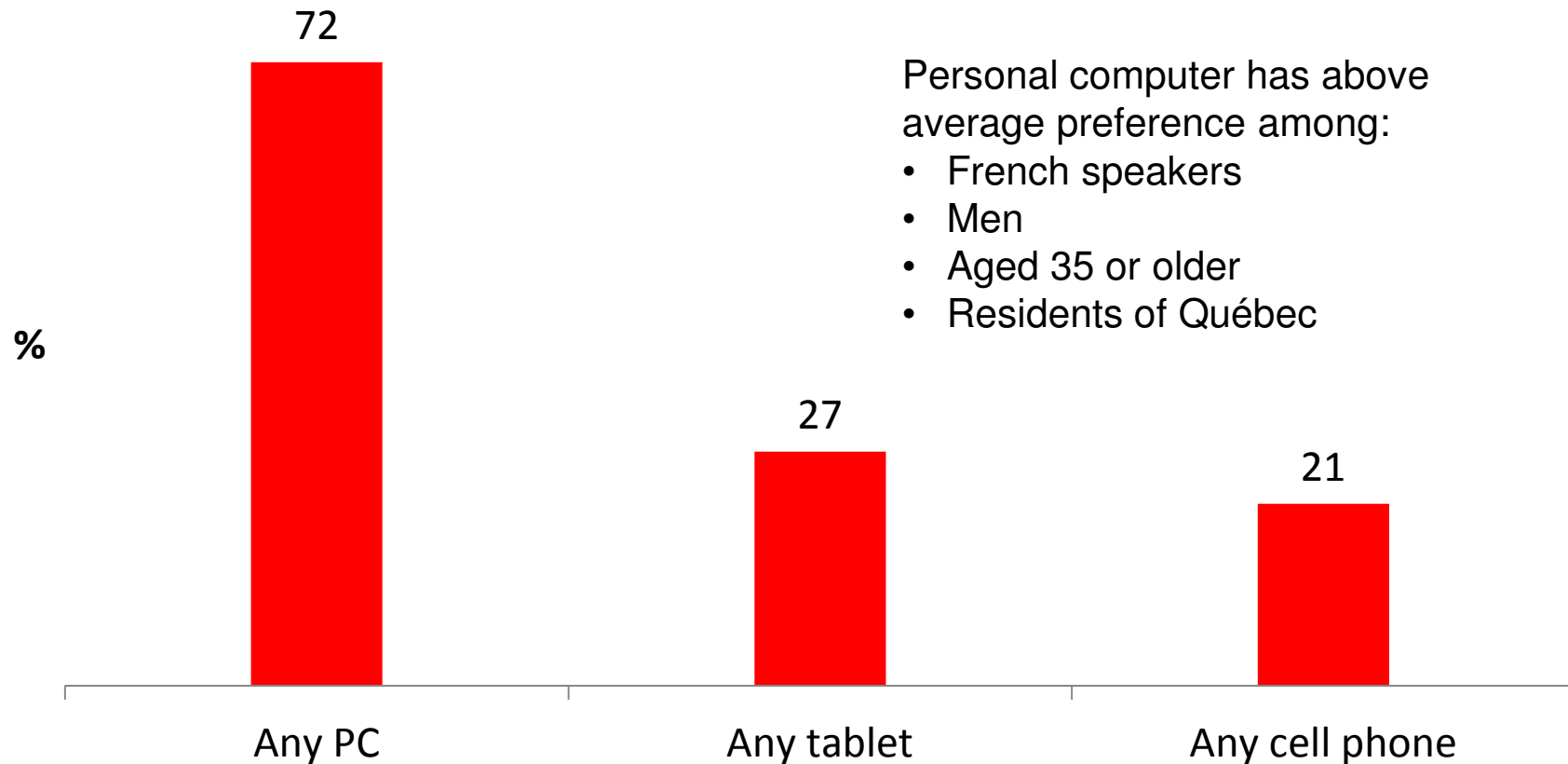
“Any email” includes “Delivered to In Box” on PC, tablet and/or cell phone  
“Any flyer website” includes “On a flyer website” on PC, tablet and/or cell phone

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

Source: FDSA 2015 Consumer Engagement Study, Totum Research



# Preferred Way to Receive Online Flyers – Device Summary



Personal computer has above average preference among:

- French speakers
- Men
- Aged 35 or older
- Residents of Québec

“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”

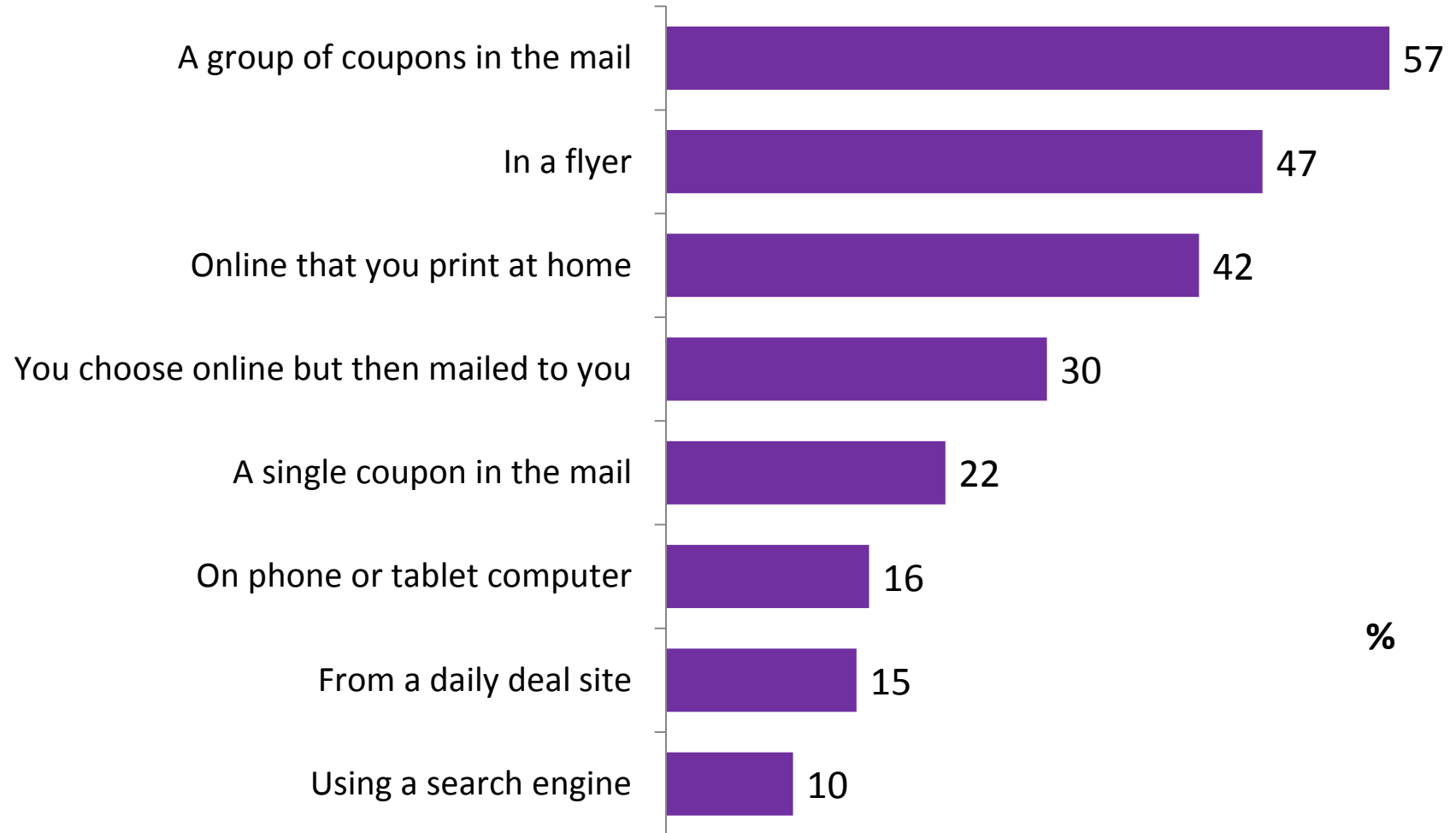
Question: How would you prefer to receive your online flyers?

Source: FDSA 2015 Consumer Engagement Study, Totum Research

# Preferred Way to Receive Coupons



Multiple coupons in print format are preferred.



Question: How would you prefer to receive your coupons?

Source: FDSA 2015 Consumer Engagement Study, Totum Research



## FDSA 2015 Consumer Engagement Study

# FLYER USAGE BEFORE SHOPPING BY CATEGORY

# Flyer Usage Before Shopping

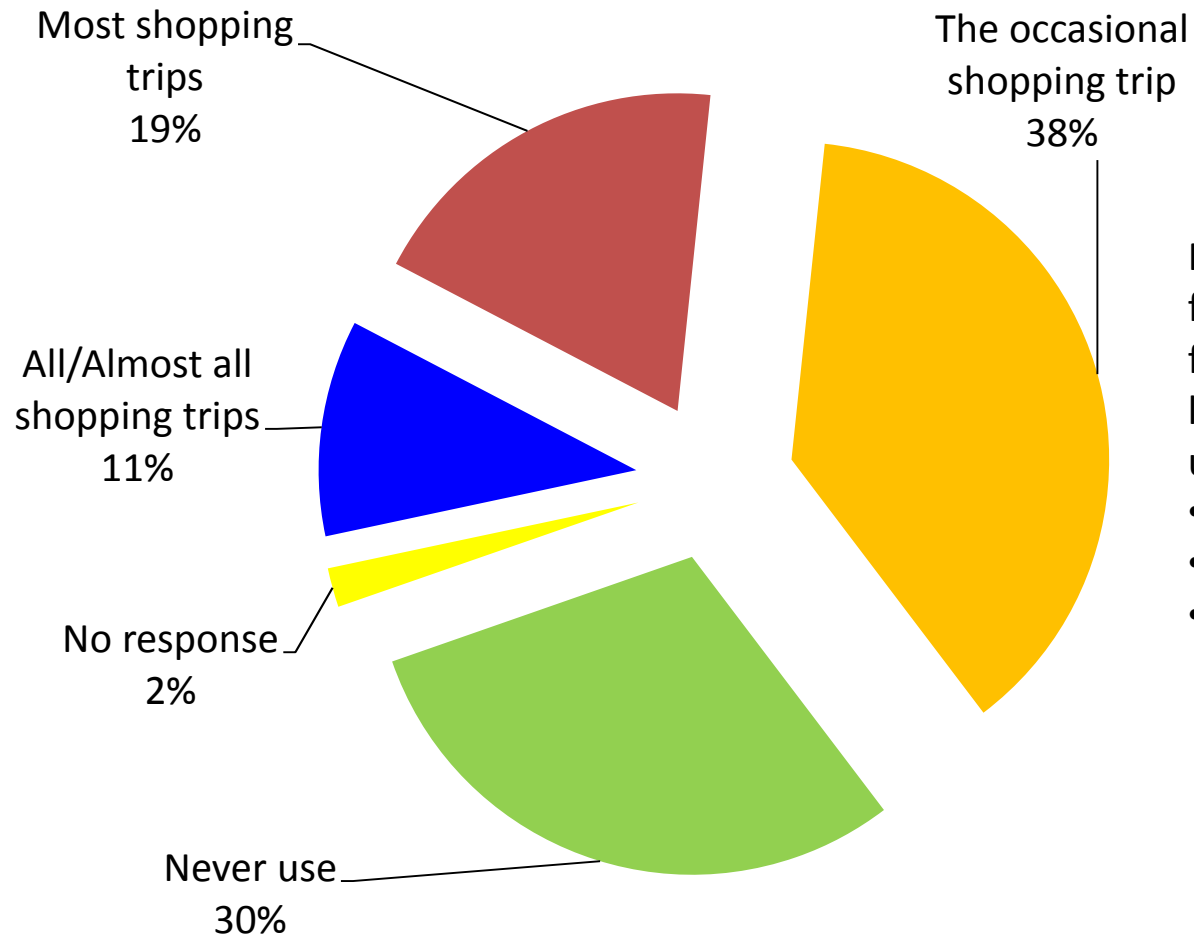


Category	All/Almost all shopping trips	Most shopping trips	Occasional trip	Never use
Appliances, Furniture, Home Furnishings	11	19	38	30
Automotive	8	14	32	44
Clothing and Accessories	11	23	39	25
Computer Hardware/Software	13	20	35	30
Entertainment/Restaurants	9	19	40	31
Groceries	48	26	16	9
Hardware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

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

Source: FDSA 2015 Consumer Engagement Study, Totum Research

# Frequency of Using Flyers Before Shopping Appliances, Furniture, Home Furnishings



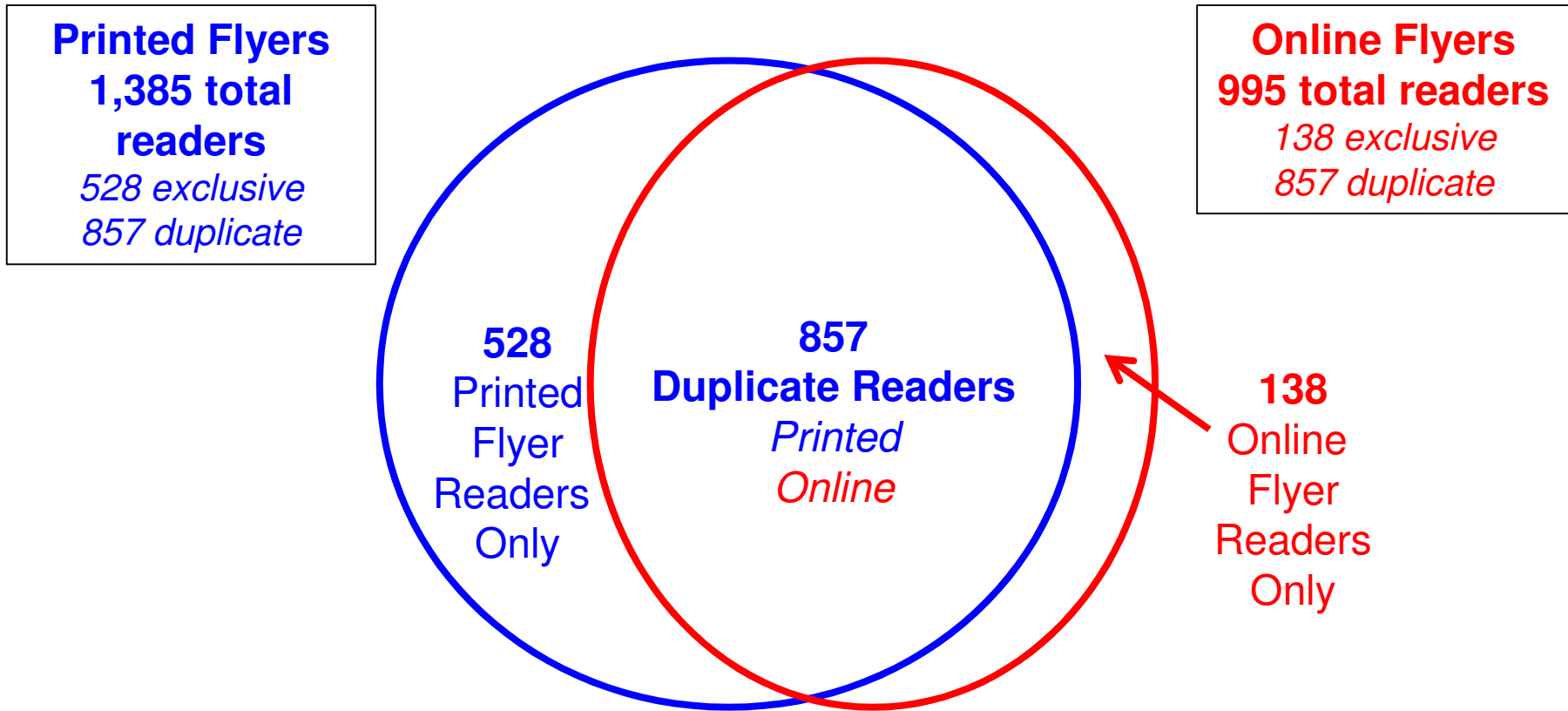
Flyers for appliances, furniture or home furnishings are more likely to be frequently used by:

- Adults in families
- Employed people
- Residents of Atlantic Canada

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

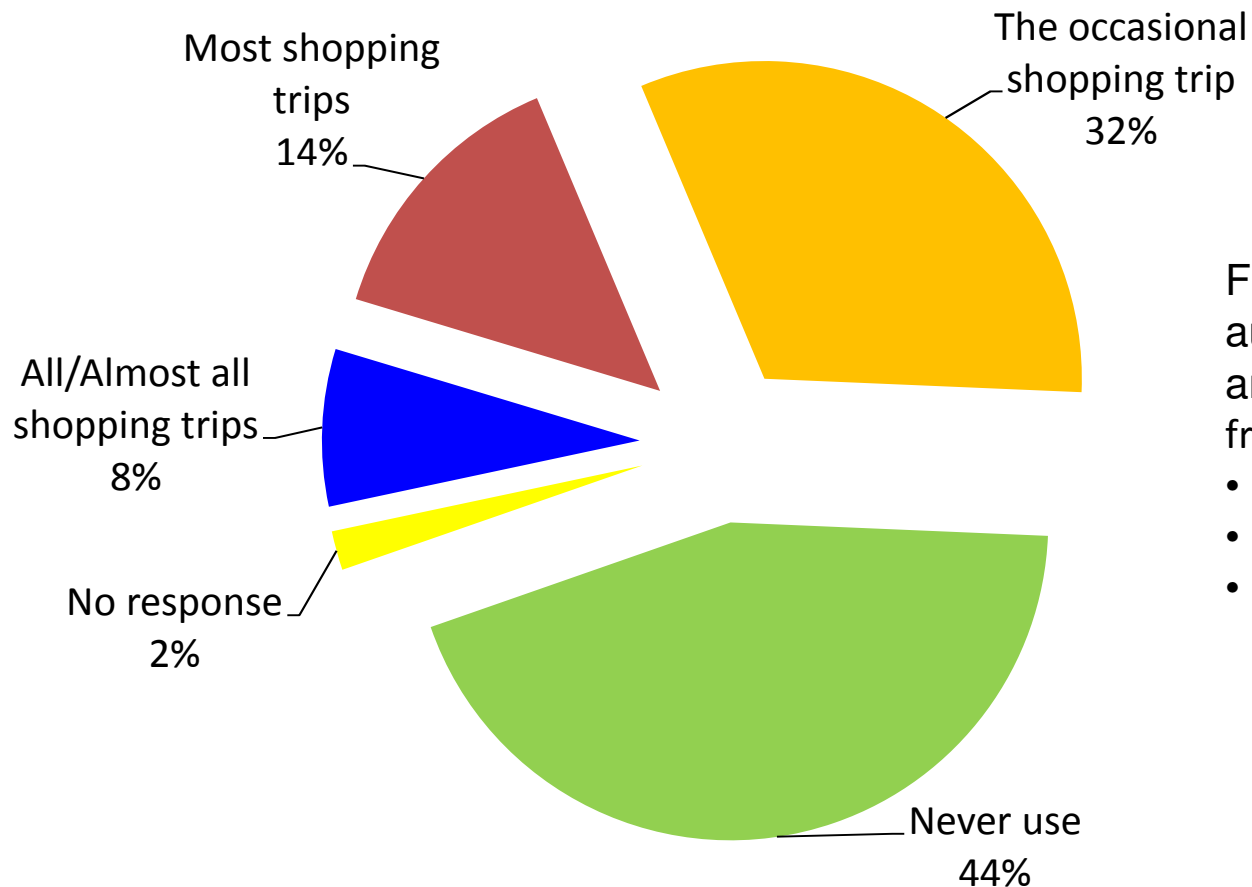
Source: FDSA 2015 Consumer Engagement Study, Totum Research

# Duplicate and Exclusive - Printed and Online Flyers Appliances, Furniture, Home Furnishings



**Total Appliance, Furniture, Home Furnishings Flyer Readers  
(Printed/Online) = 1,523**

# Frequency of Using Flyers Before Shopping Automotive



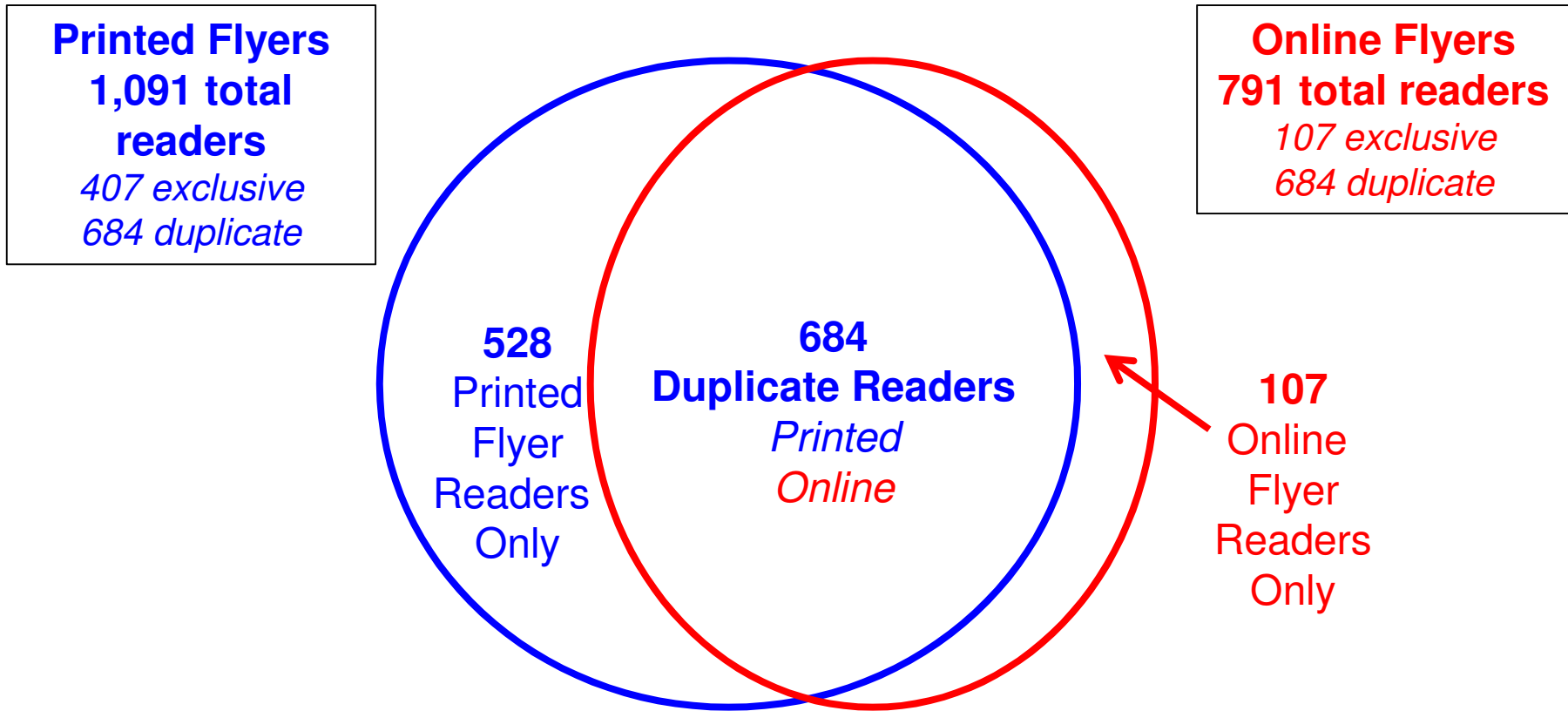
Flyers for automotive products are more likely to be frequently used by:

- Men
- Adults in families
- Employed people

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

Source: FDSA 2015 Consumer Engagement Study, Totum Research

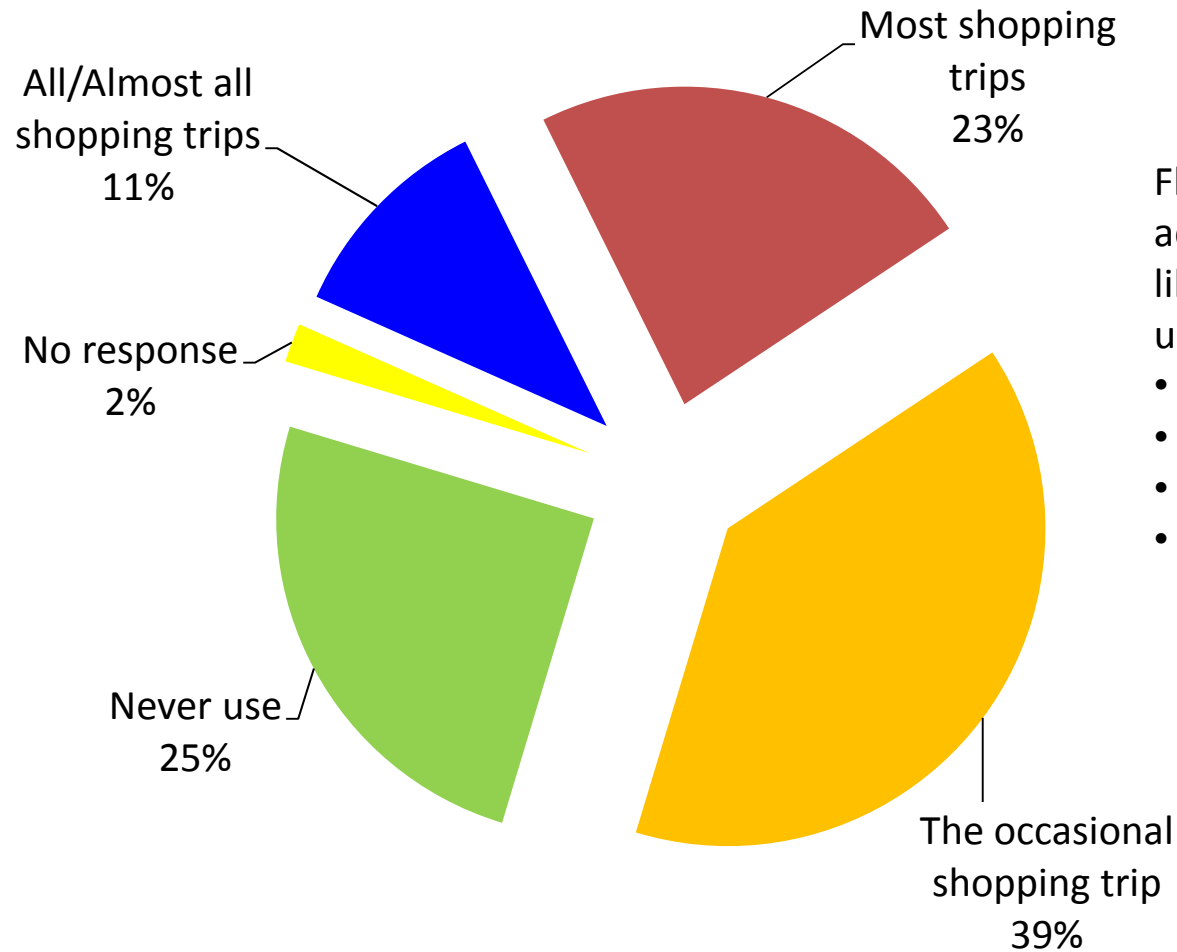
# Duplicate and Exclusive - Printed and Online Flyers Automotive



**Total Automotive Flyer Readers (Printed/Online) = 1,199**



# Frequency of Using Flyers Before Shopping Clothing and Accessories



Flyers for clothing and accessories are more likely to be frequently used by:

- French
- Women
- Adults in families
- Residents of Québec and Atlantic Canada

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

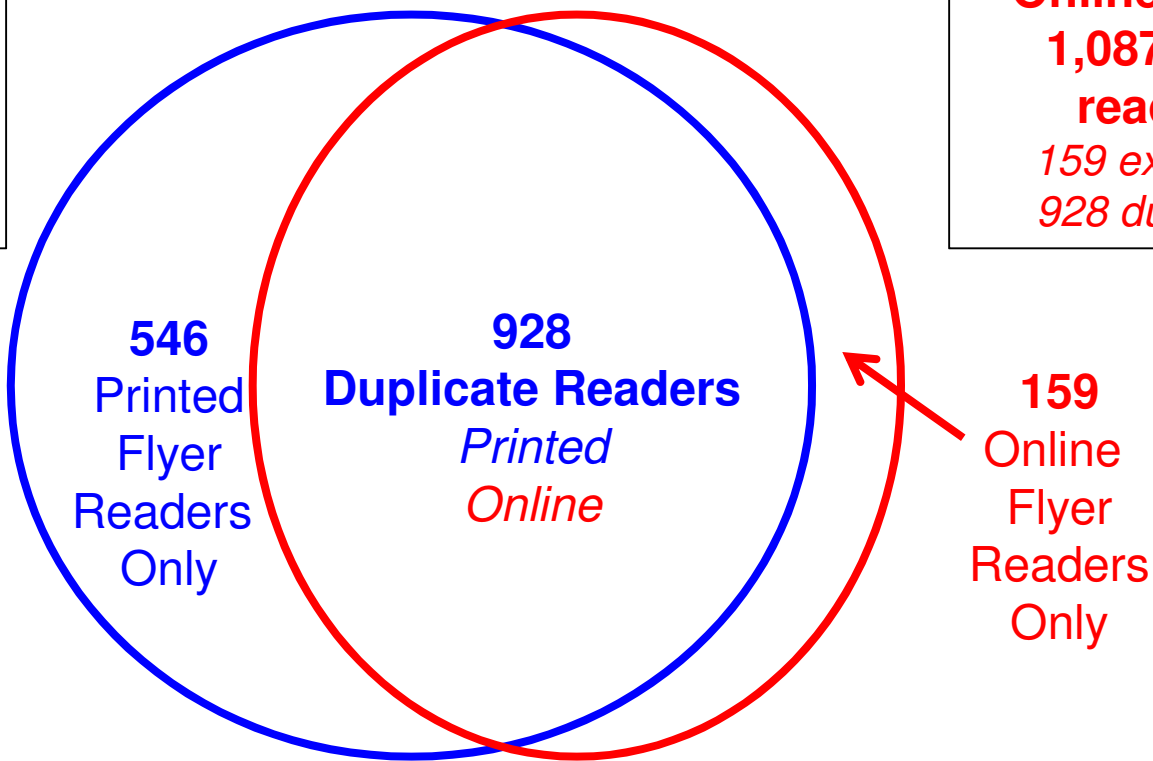
Source: FDSA 2015 Consumer Engagement Study, Totum Research

# Duplicate and Exclusive - Printed and Online Flyers Clothing and Accessories



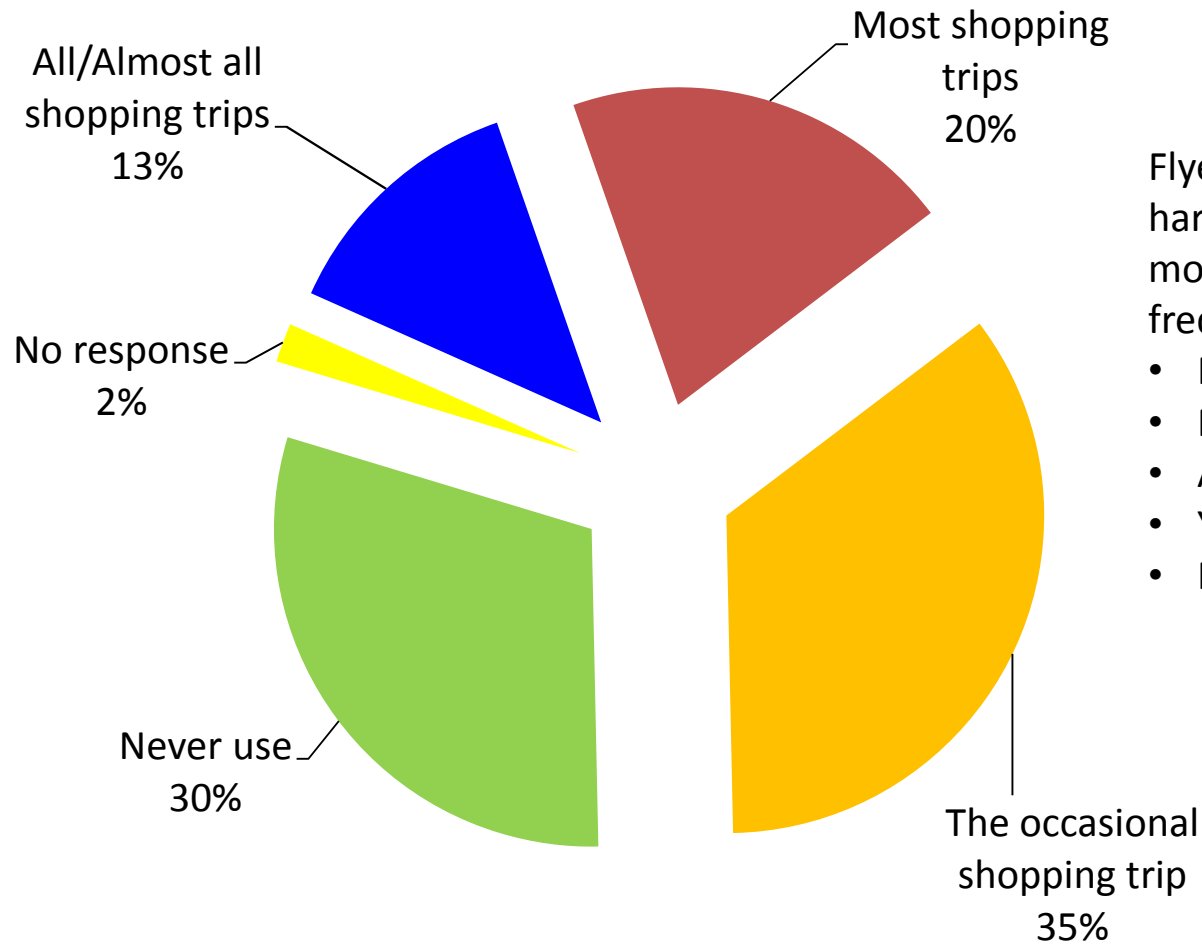
**Printed Flyers**  
**1,474 total readers**  
*546 exclusive*  
*928 duplicate*

**Online Flyers**  
**1,087 total readers**  
*159 exclusive*  
*928 duplicate*



**Total Clothing and Accessories Flyer Readers  
(Printed/Online) = 1,633**

# Frequency of Using Flyers Before Shopping Computer Hardware and Software



Flyers for computer hardware and software more likely to be frequently used by:

- French
- Men
- Adults in families
- Young adults
- Residents of Québec

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

Source: FDSA 2015 Consumer Engagement Study, Totum Research

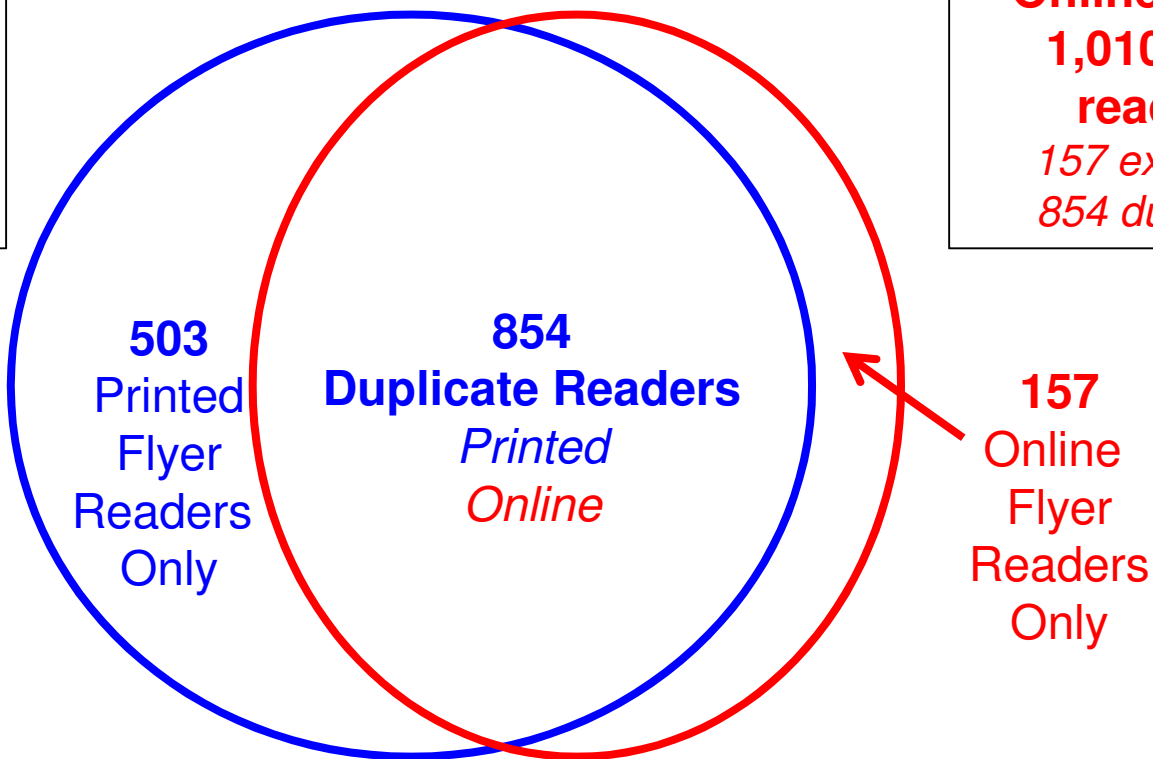
# Duplicate and Exclusive - Printed and Online Flyers

## Computer Hardware and Software



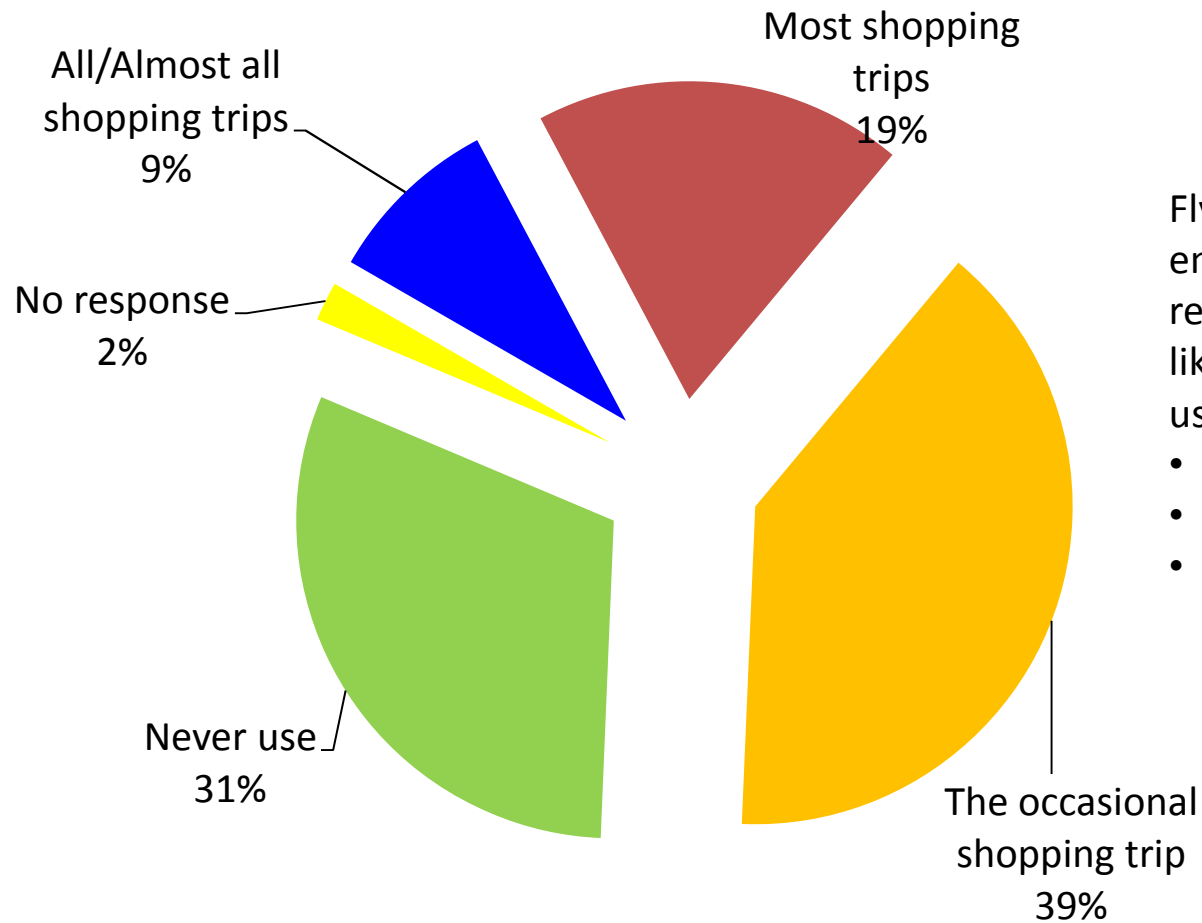
**Printed Flyers**  
**1,356 total readers**  
*503 exclusive*  
*854 duplicate*

**Online Flyers**  
**1,010 total readers**  
*157 exclusive*  
*854 duplicate*



**Total Computer Hardware and Software Flyer Readers  
(Printed/Online) = 1,513**

# Frequency of Using Flyers Before Shopping Entertainment and Restaurants



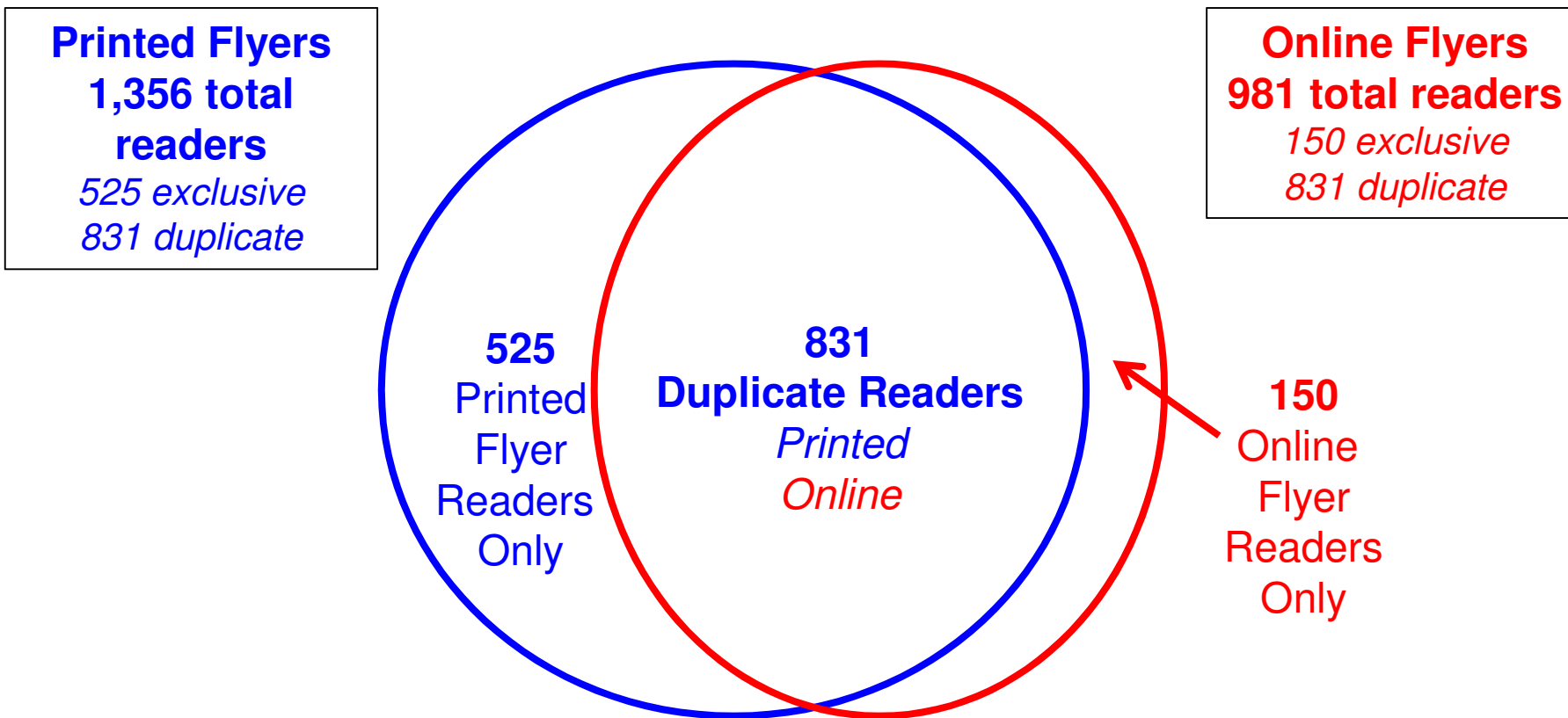
Flyers for entertainment and restaurants are more likely to be frequently used by:

- Adults in families
- Employed
- Residents of Atlantic Canada

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

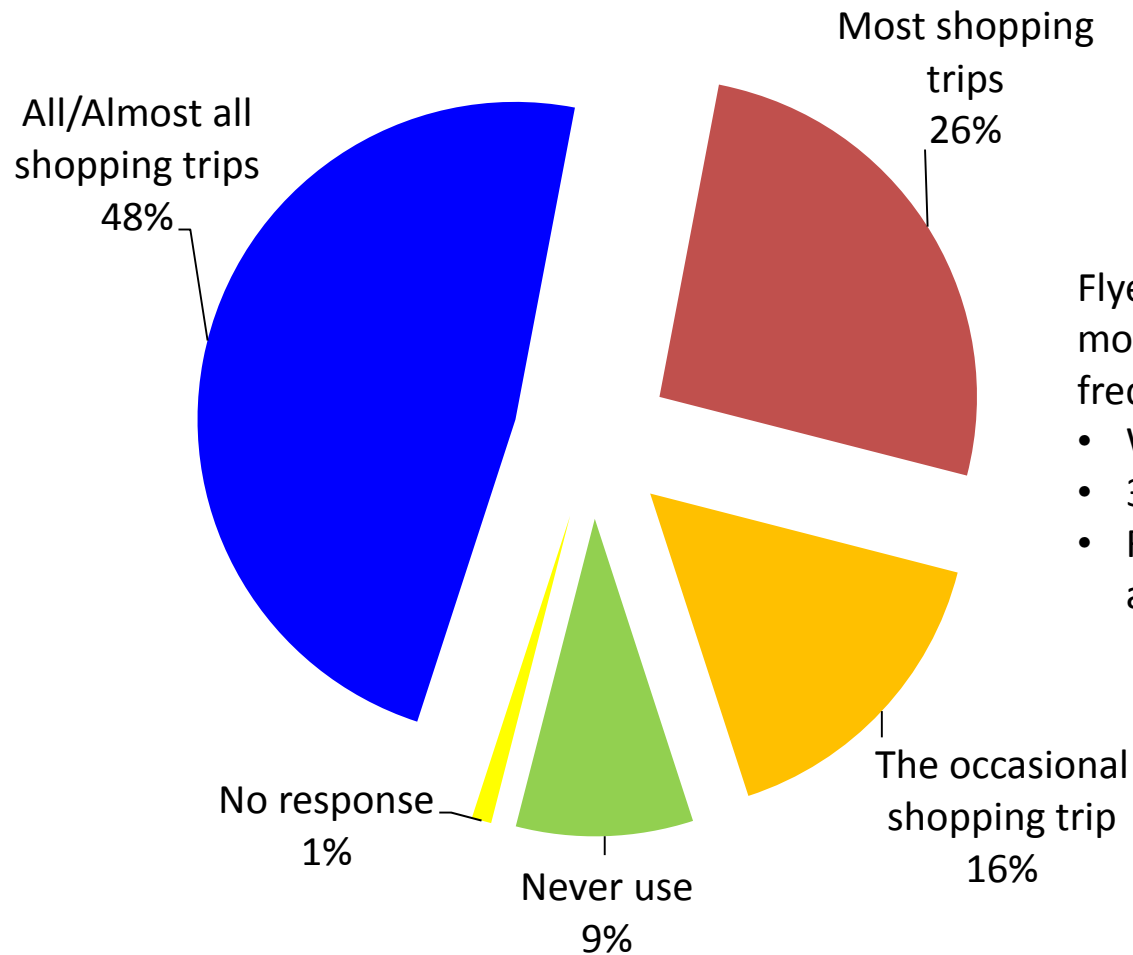
Source: FDSA 2015 Consumer Engagement Study, Totum Research

# Duplicate and Exclusive - Printed and Online Flyers Entertainment and Restaurants



**Total Entertainment and Restaurant Flyer Readers  
(Printed/Online) = 1,663**

# Frequency of Using Flyers Before Shopping Groceries



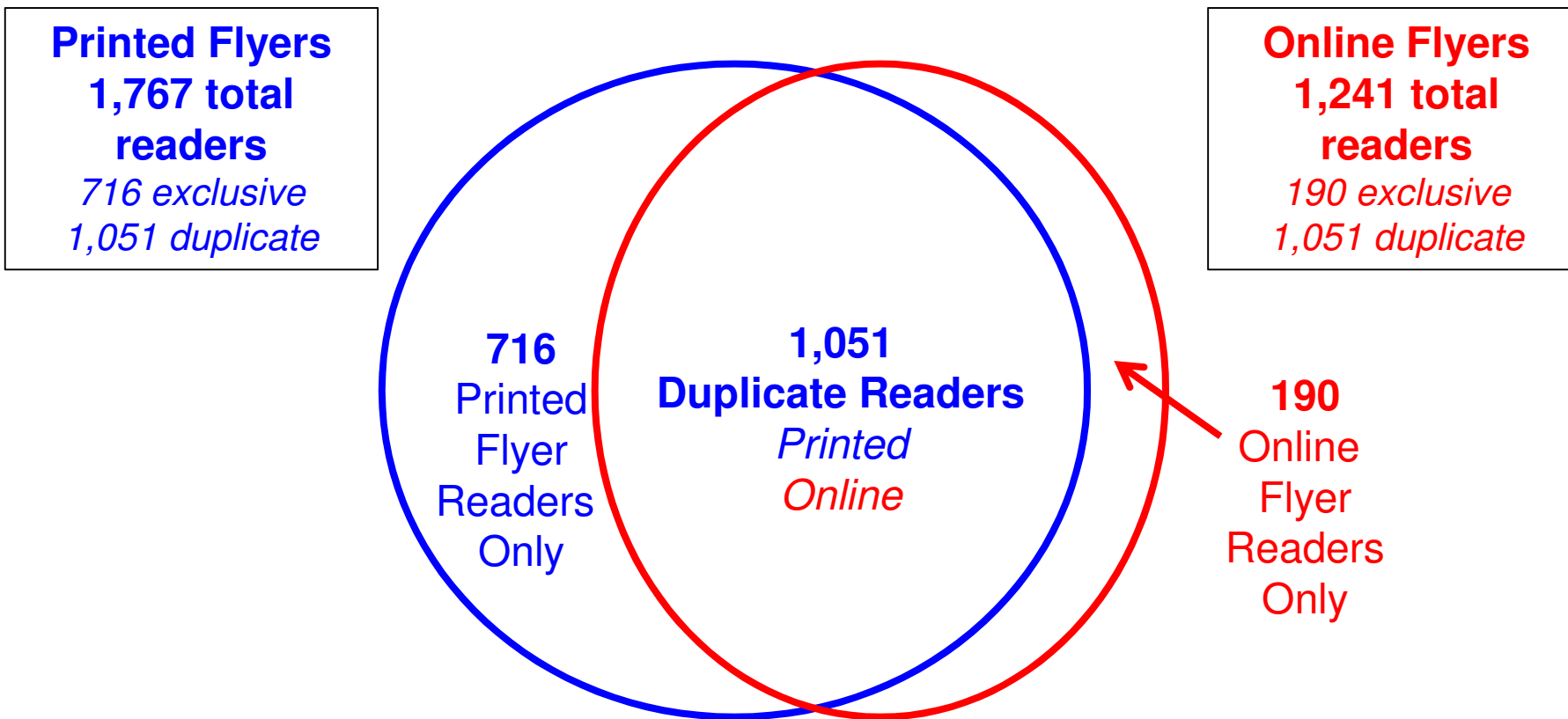
Flyers for groceries are more likely to be frequently used by:

- Women
- 35 years or older
- Residents of Québec and Atlantic Canada

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

Source: FDSA 2015 Consumer Engagement Study, Totum Research

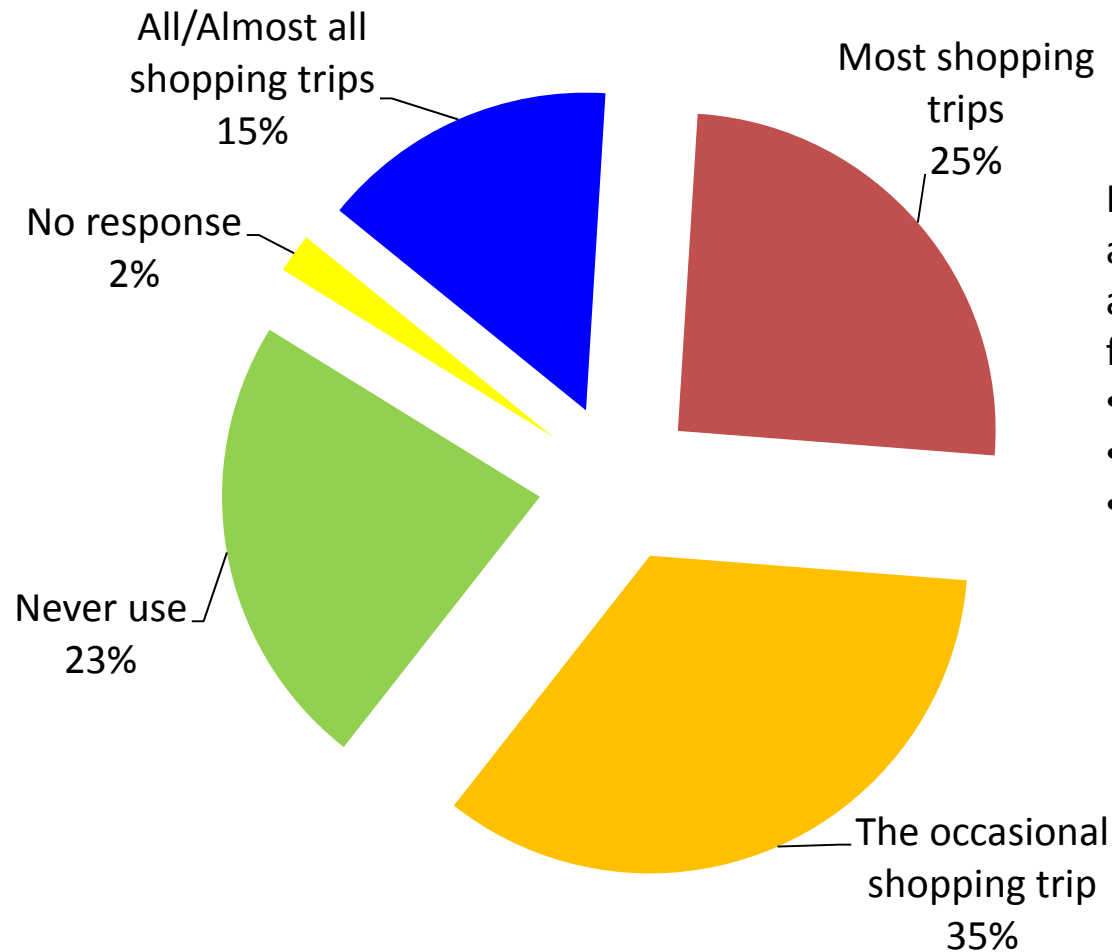
# Duplicate and Exclusive - Printed and Online Flyers Groceries



**Total Grocery Flyer Readers (Printed/Online) = 1,957**



# Frequency of Using Flyers Before Shopping Health Care and Personal Care Items



Flyers for health care and personal care items are more likely to be frequently used by:

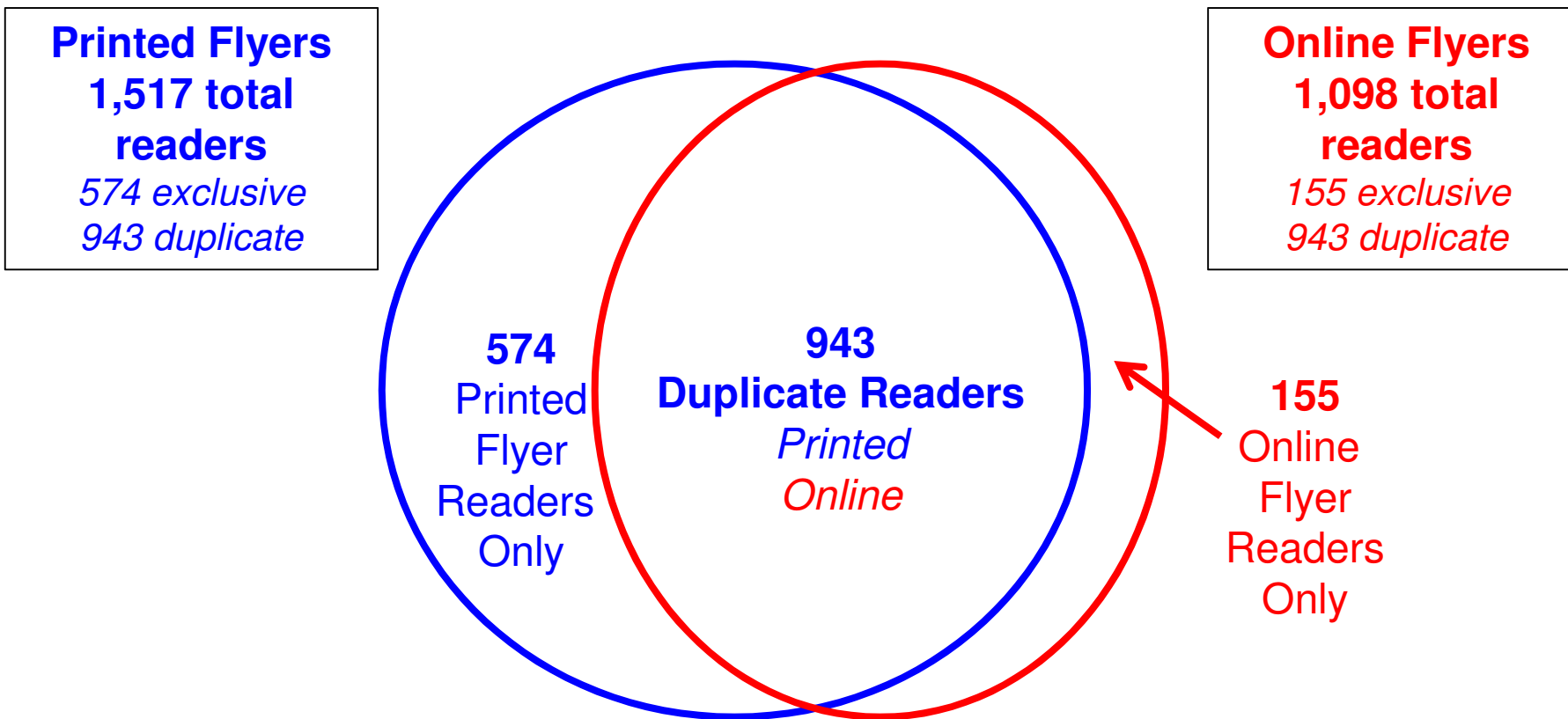
- Women
- Adults in families
- Residents of Atlantic Canada

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

Source: FDSA 2015 Consumer Engagement Study, Totum Research

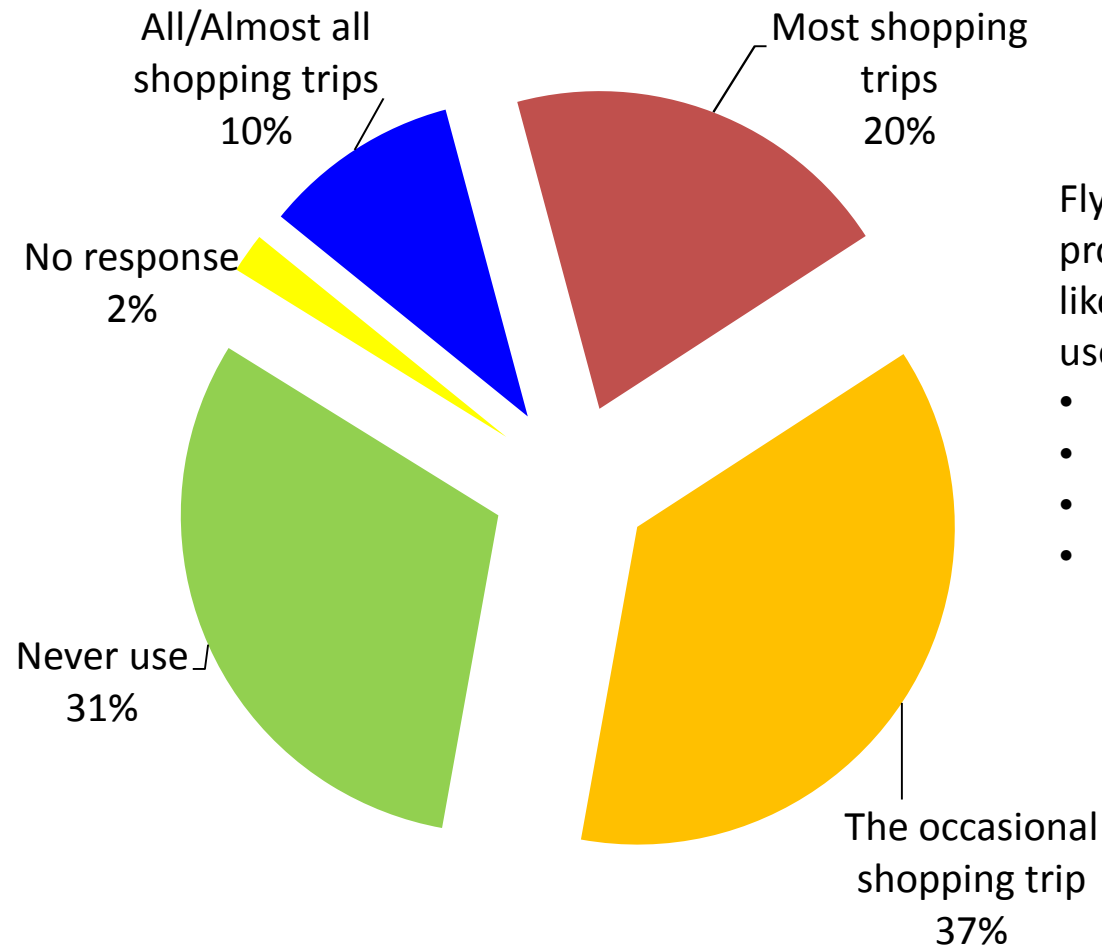
# Duplicate and Exclusive - Printed and Online Flyers

## Health Care and Personal Care Products



**Total Health Care and Personal Care Flyer Readers  
(Printed/Online) = 1,672**

# Frequency of Using Flyers Before Shopping Hardware Products



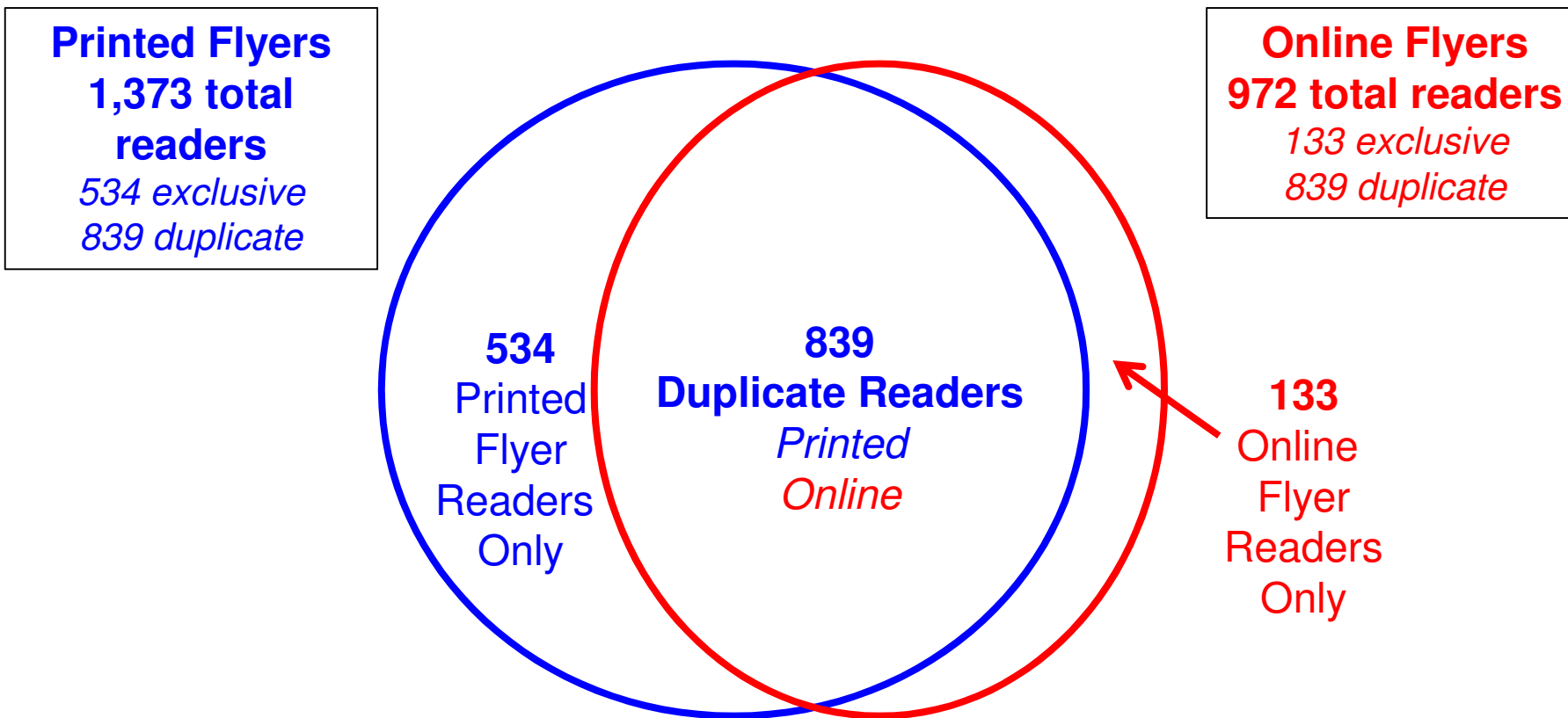
Flyers for hardware products are more likely to be frequently used by:

- French speaking
- Men
- Adults in families
- Residents of Québec

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

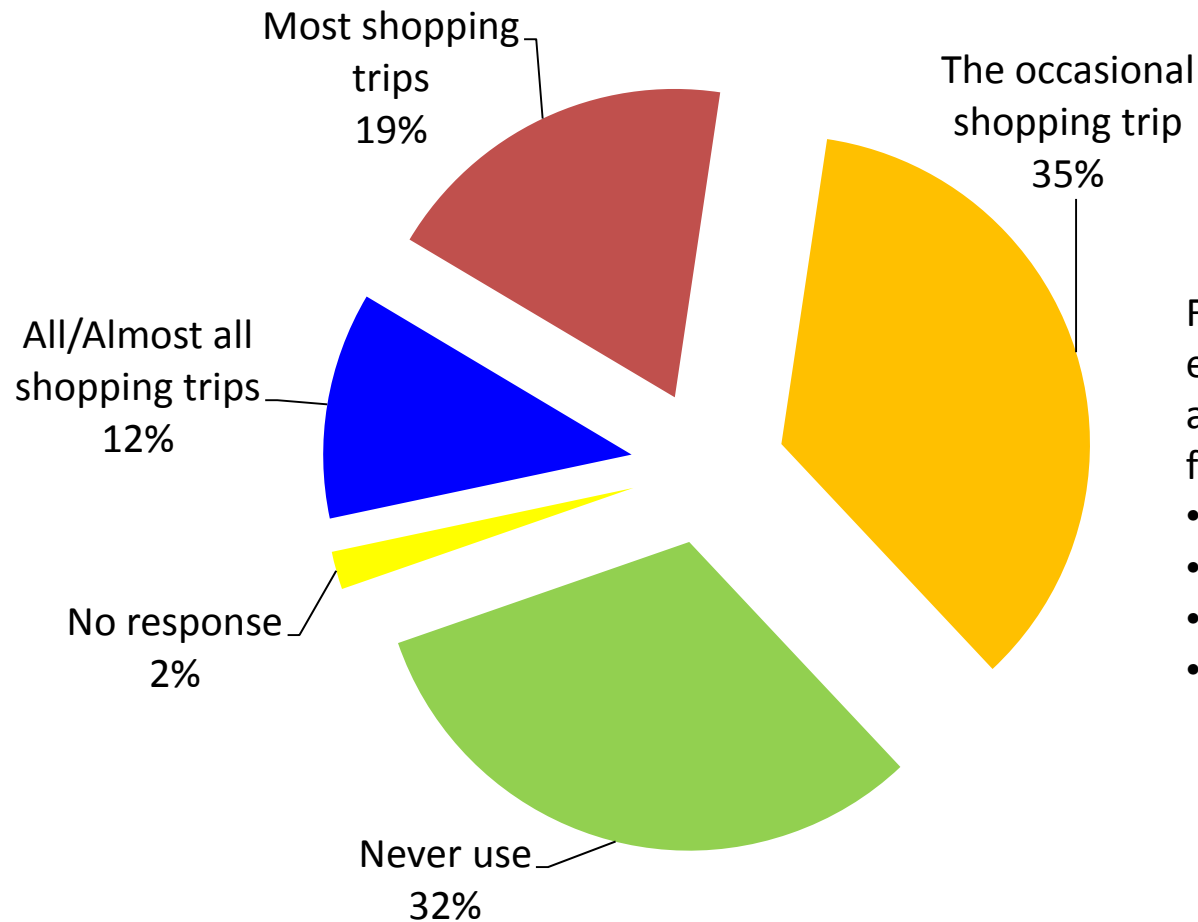
Source: FDSA 2015 Consumer Engagement Study, Totum Research

# Duplicate and Exclusive - Printed and Online Flyers Hardware Products



**Total Hardware Flyer Readers (Printed/Online) = 1,506**

# Frequency of Using Flyers Before Shopping Home Entertainment Items



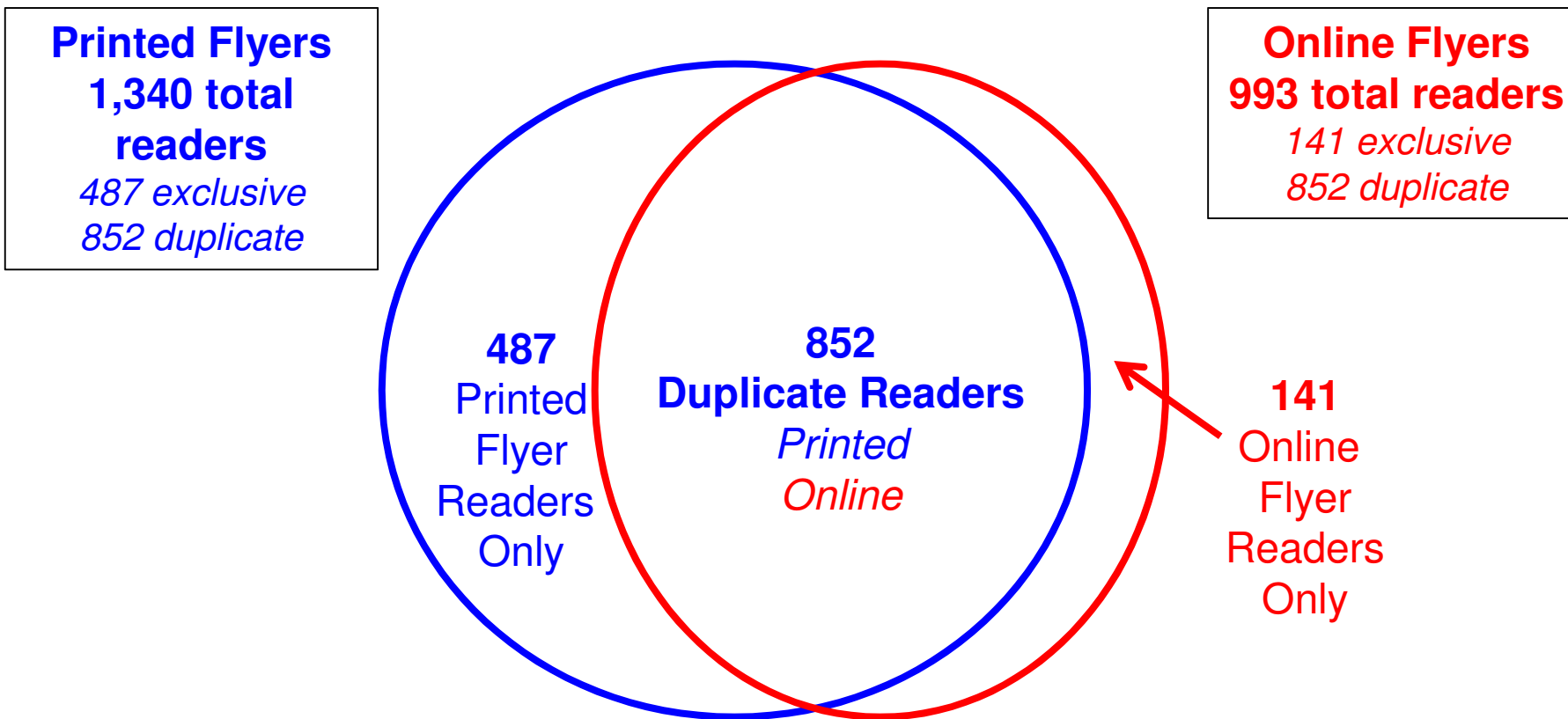
Flyers for home entertainment items are more likely to be frequently used by:

- Adults in families
- Young adults
- Employed people
- Residents of Ontario and Atlantic Canada

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

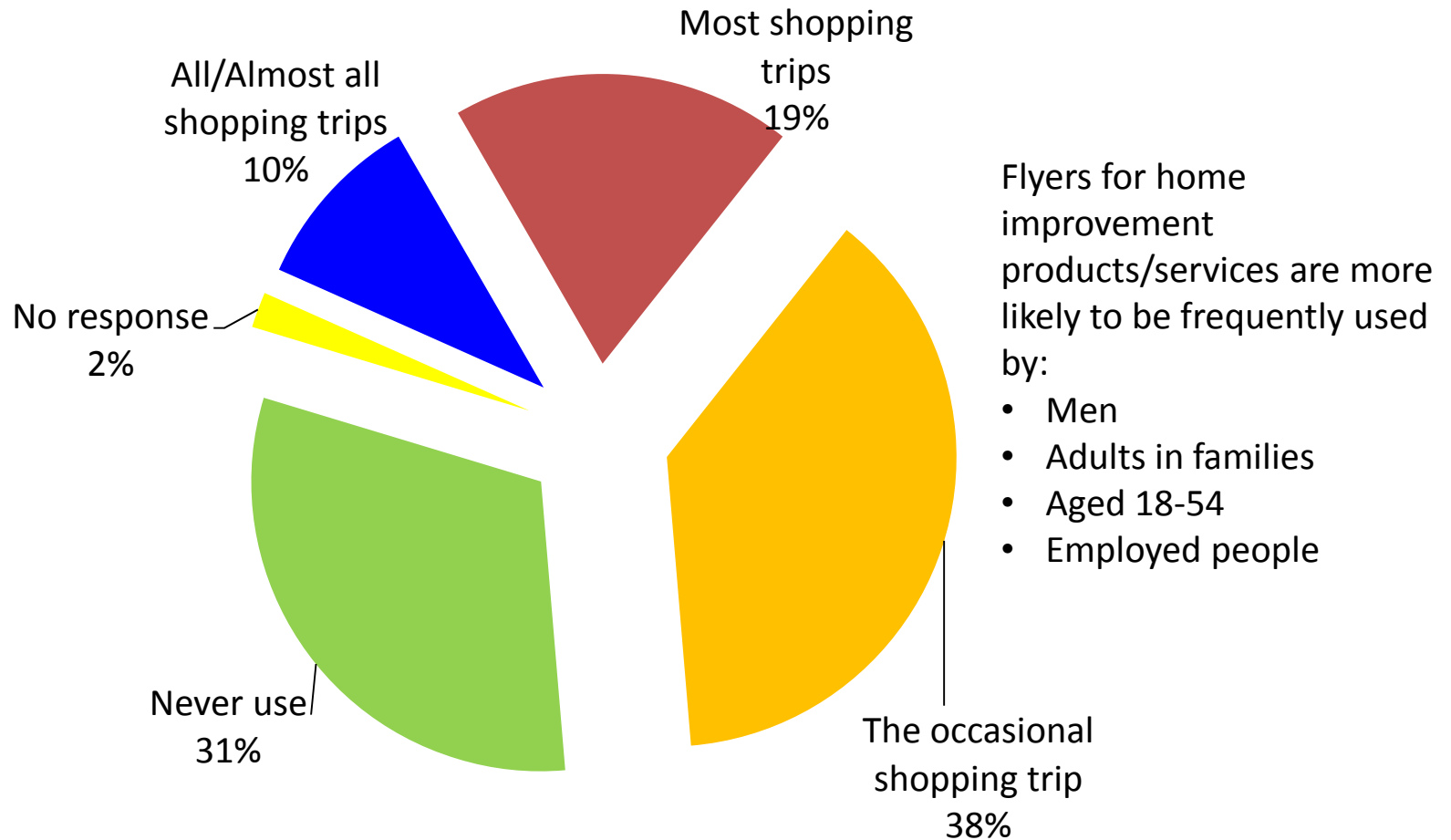
Source: FDSA 2015 Consumer Engagement Study, Totum Research

# Duplicate and Exclusive - Printed and Online Flyers Home Entertainment Items



**Total Home Entertainment Flyer Readers (Printed/Online) =  
1,481**

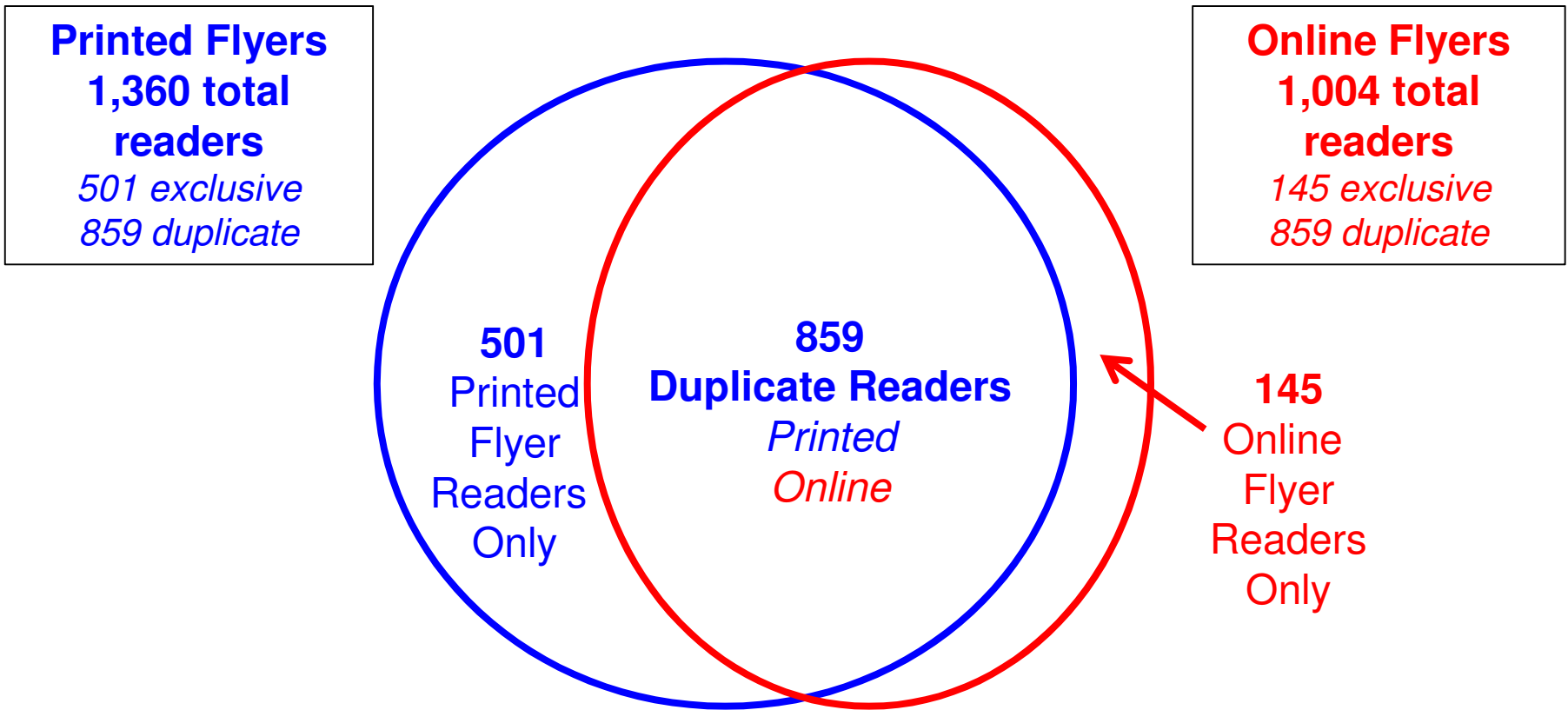
# Frequency of Using Flyers Before Shopping Home Improvement Products/Services



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

Source: FDSA 2015 Consumer Engagement Study, Totum Research

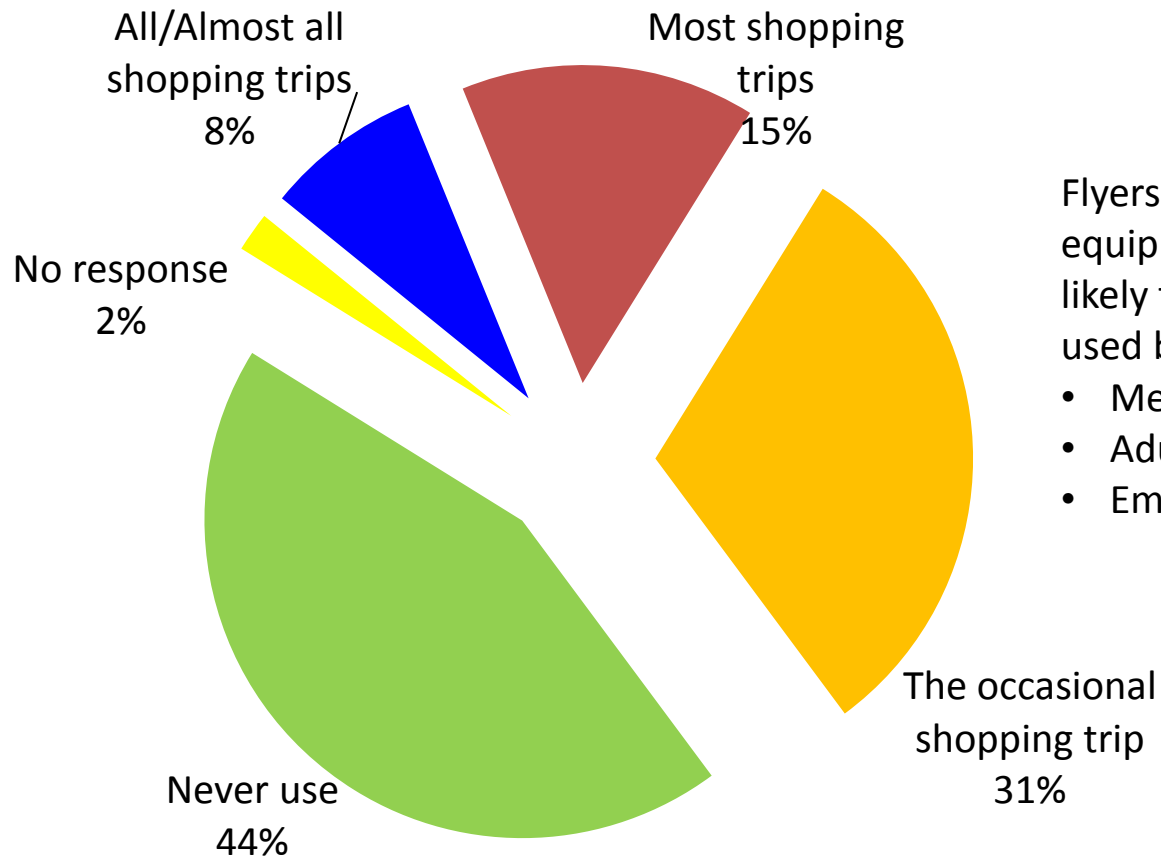
# Duplicate and Exclusive - Printed and Online Flyers Home Improvement Products/Services



**Total Home Improvement Flyer Readers (Printed/Online) = 1,505**



# Frequency of Using Flyers Before Shopping Sports Equipment



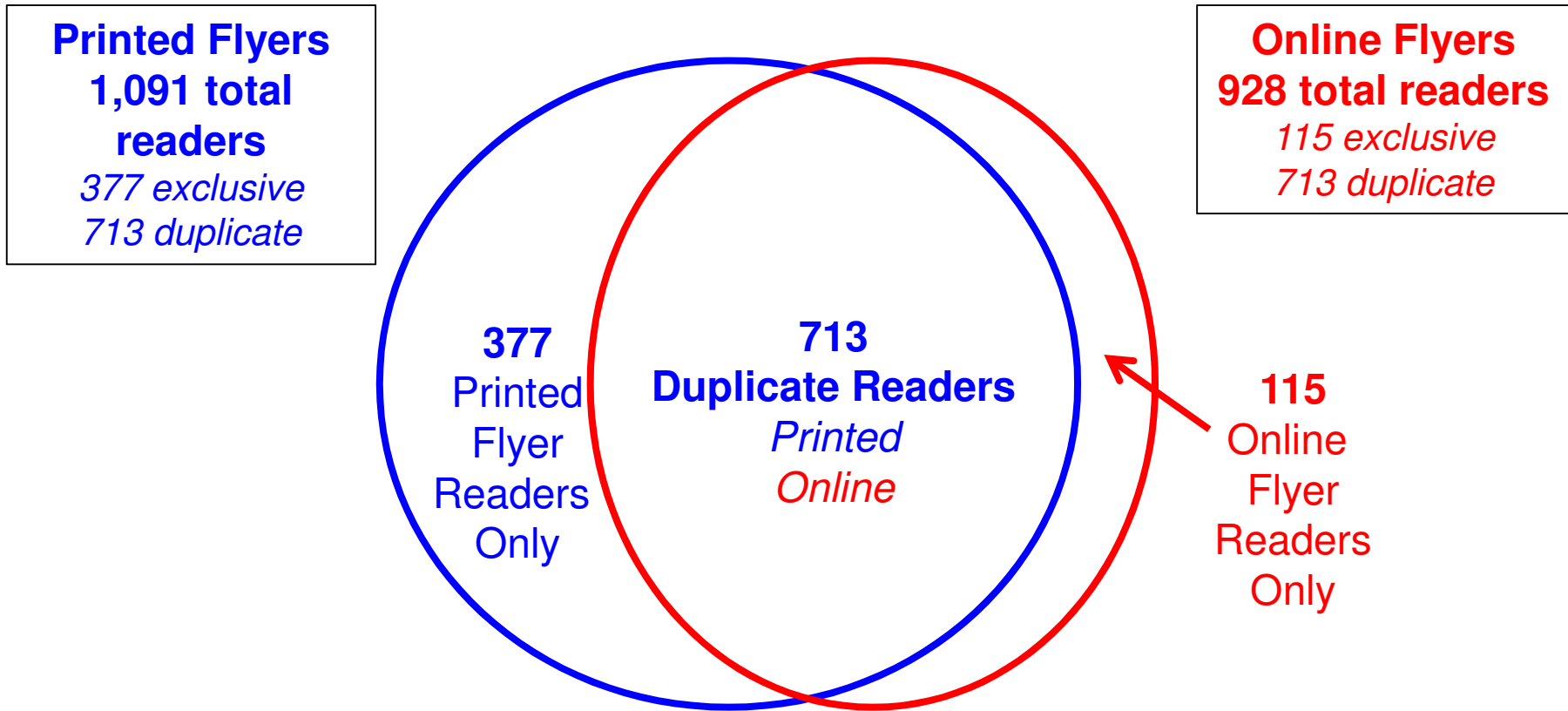
Flyers for sports equipment are more likely to be frequently used by:

- Men
- Adults in families
- Employed

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

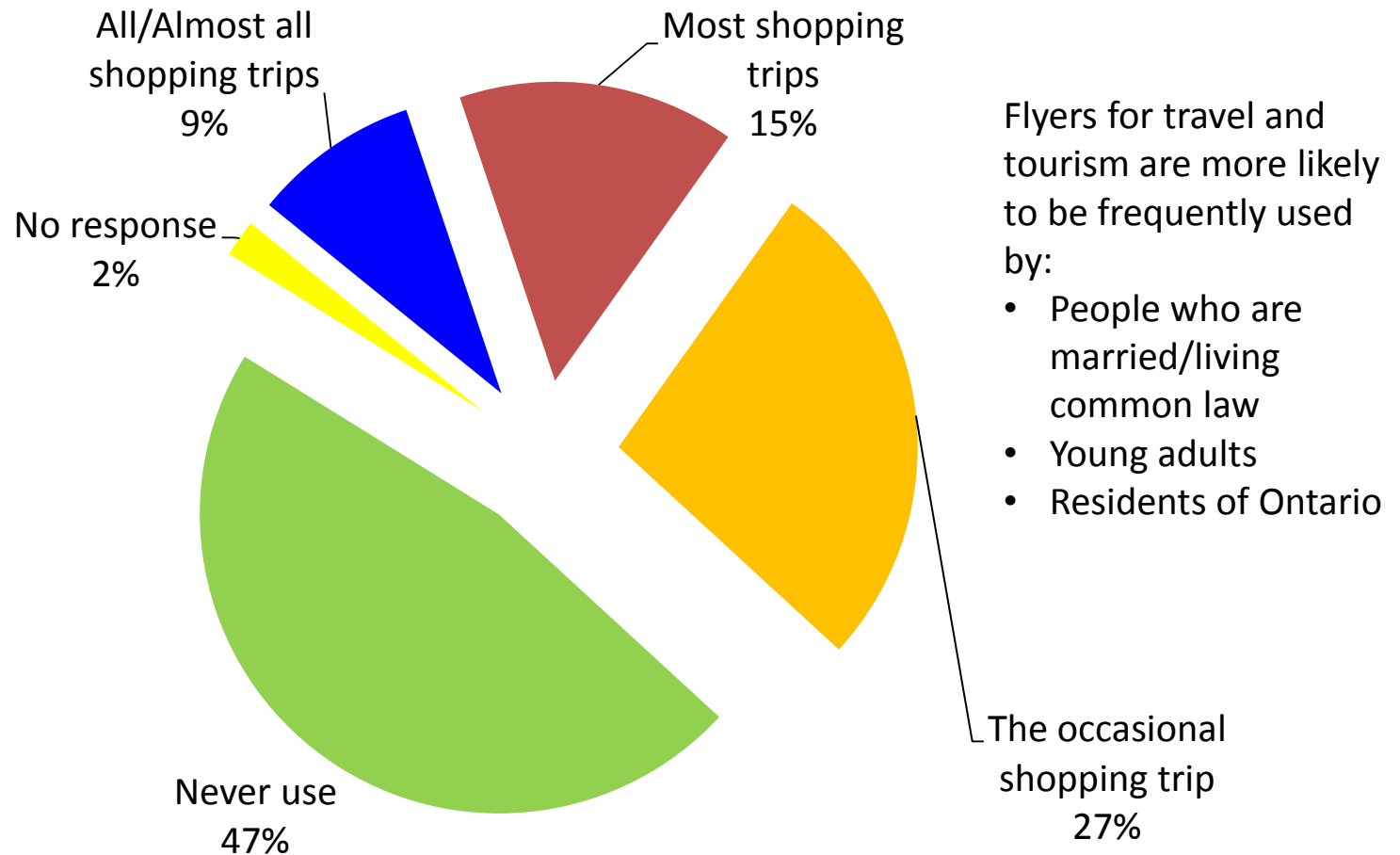
Source: FDSA 2015 Consumer Engagement Study, Totum Research

# Duplicate and Exclusive - Printed and Online Flyers Sports Equipment



**Total Sports Equipment Flyer Readers (Printed/Online) = 1,206**

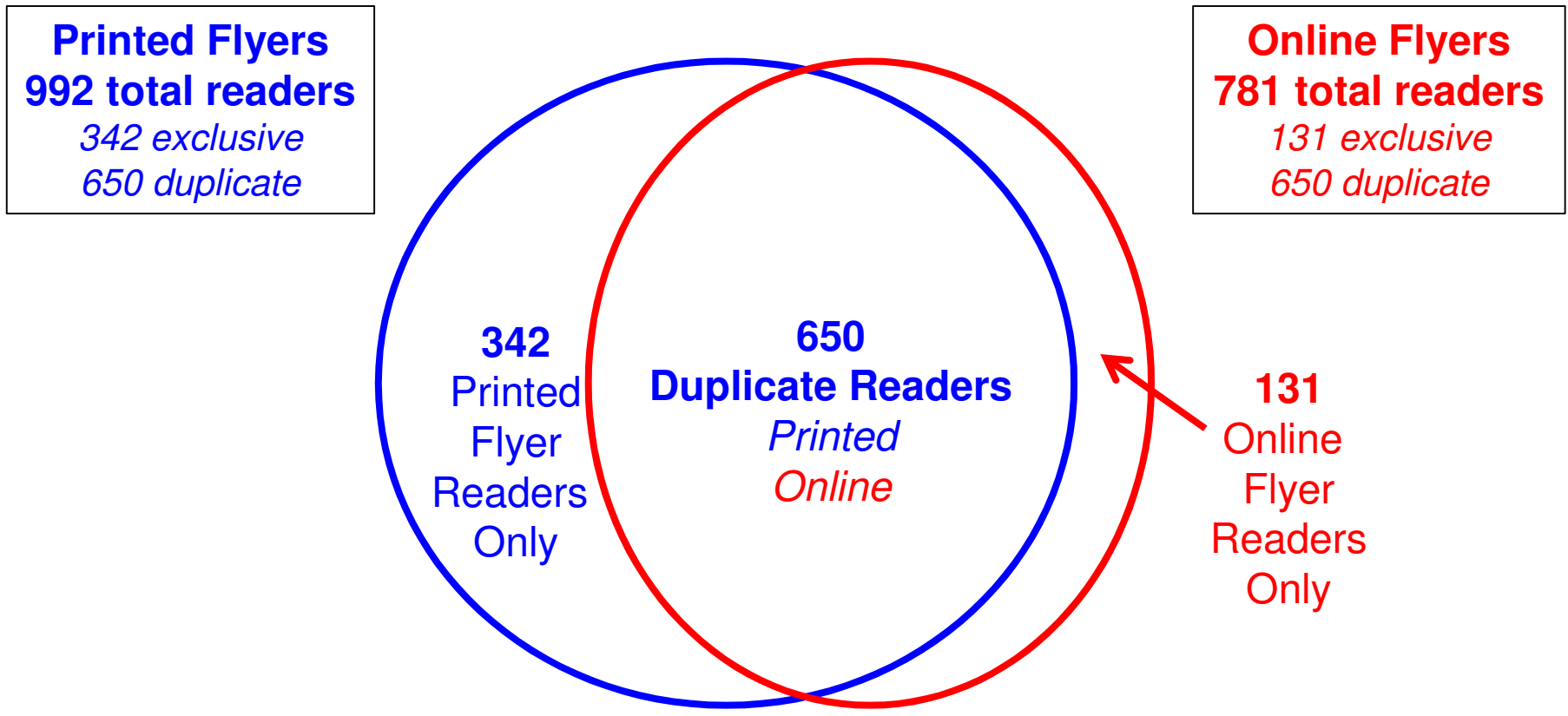
# Frequency of Using Flyers Before Shopping Travel and Tourism



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

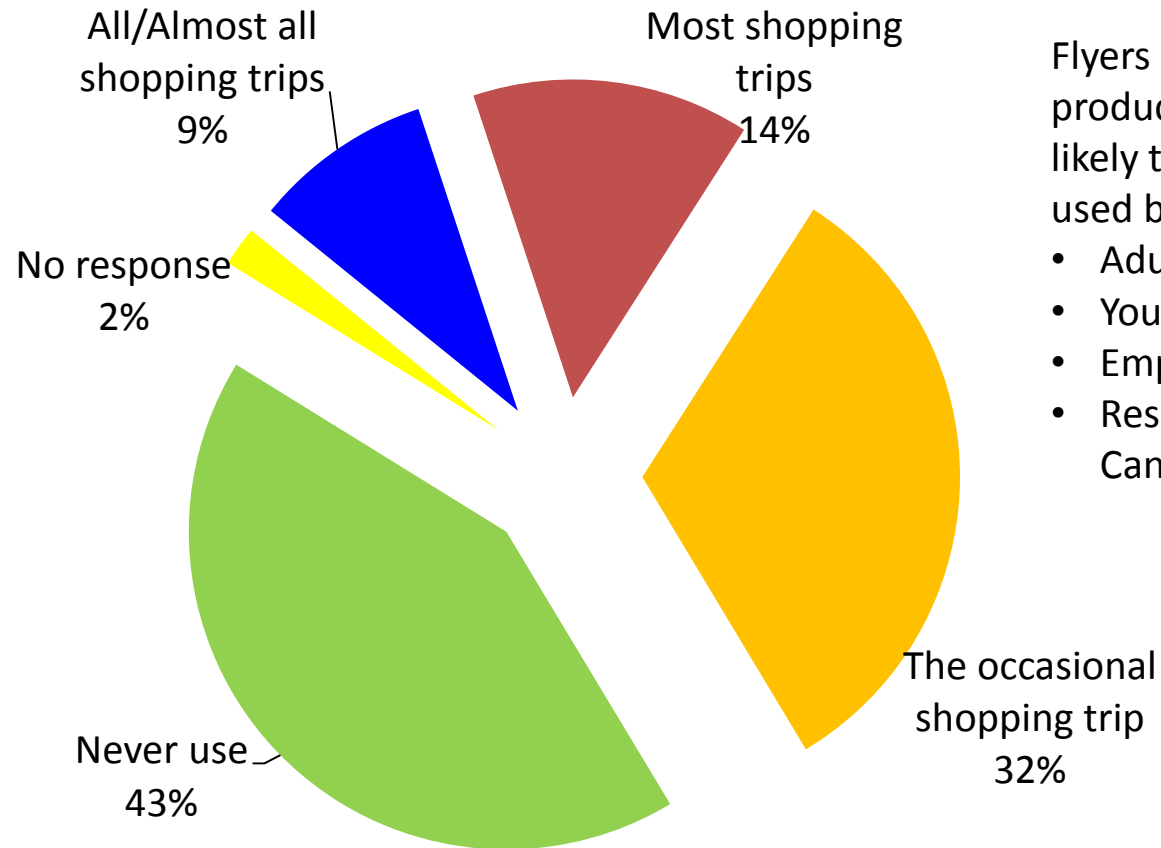
Source: FDSA 2015 Consumer Engagement Study, Totum Research

# Duplicate and Exclusive - Printed and Online Flyers Travel and Tourism



**Total Travel and Tourism Flyer Readers (Printed/Online) =  
1,123**

# Frequency of Using Flyers Before Shopping Wireless Products



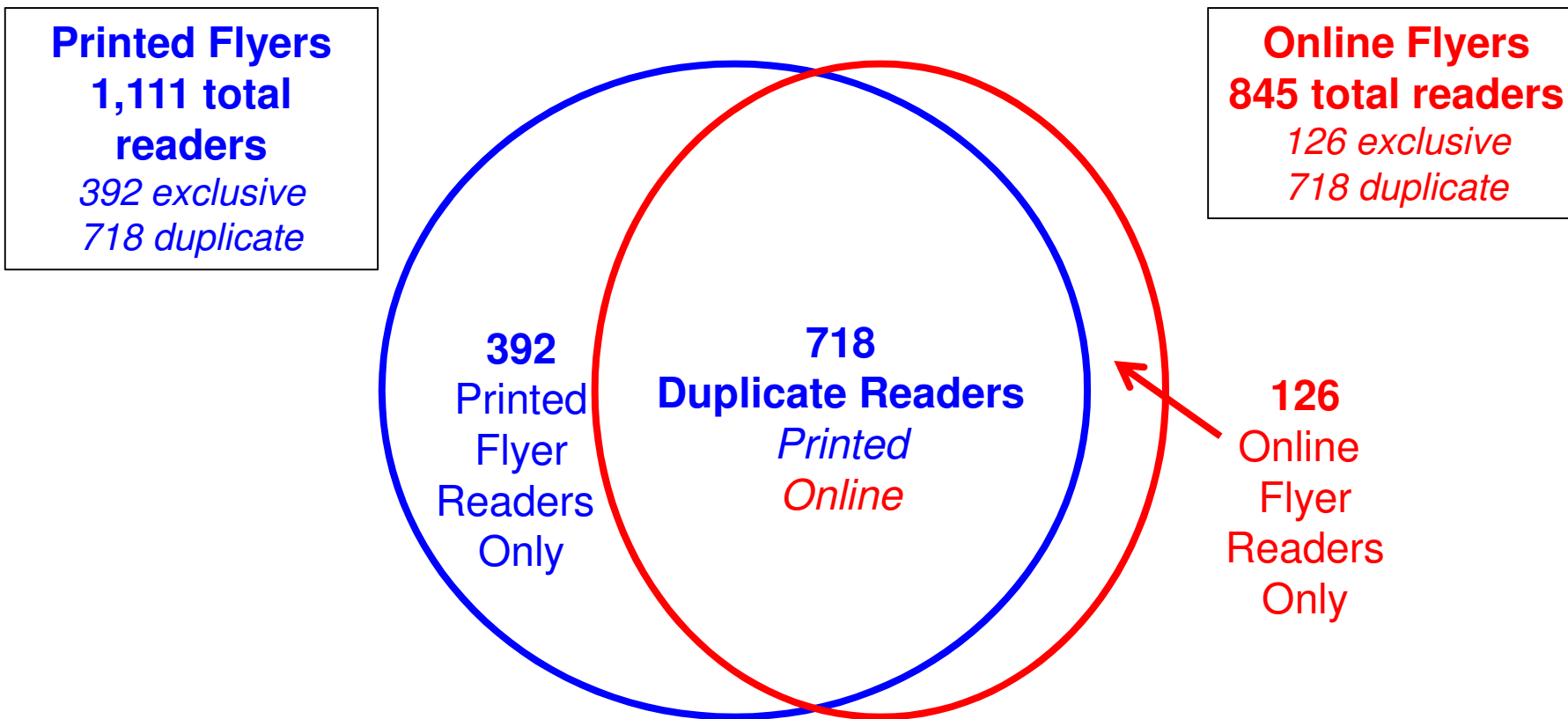
Flyers for wireless products are more likely to be frequently used by:

- Adults in families
- Young adults
- Employed
- Residents of Atlantic Canada

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

Source: FDSA 2015 Consumer Engagement Study, Totum Research

# Duplicate and Exclusive - Printed and Online Flyers Wireless Products



**Total Wireless Flyer Readers (Printed/Online) = 1,237**



## FDSA 2015 Consumer Engagement Study

# ACTION TAKEN AS A RESULT OF FLYER EXPOSURE

# Flyers Drive Action



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

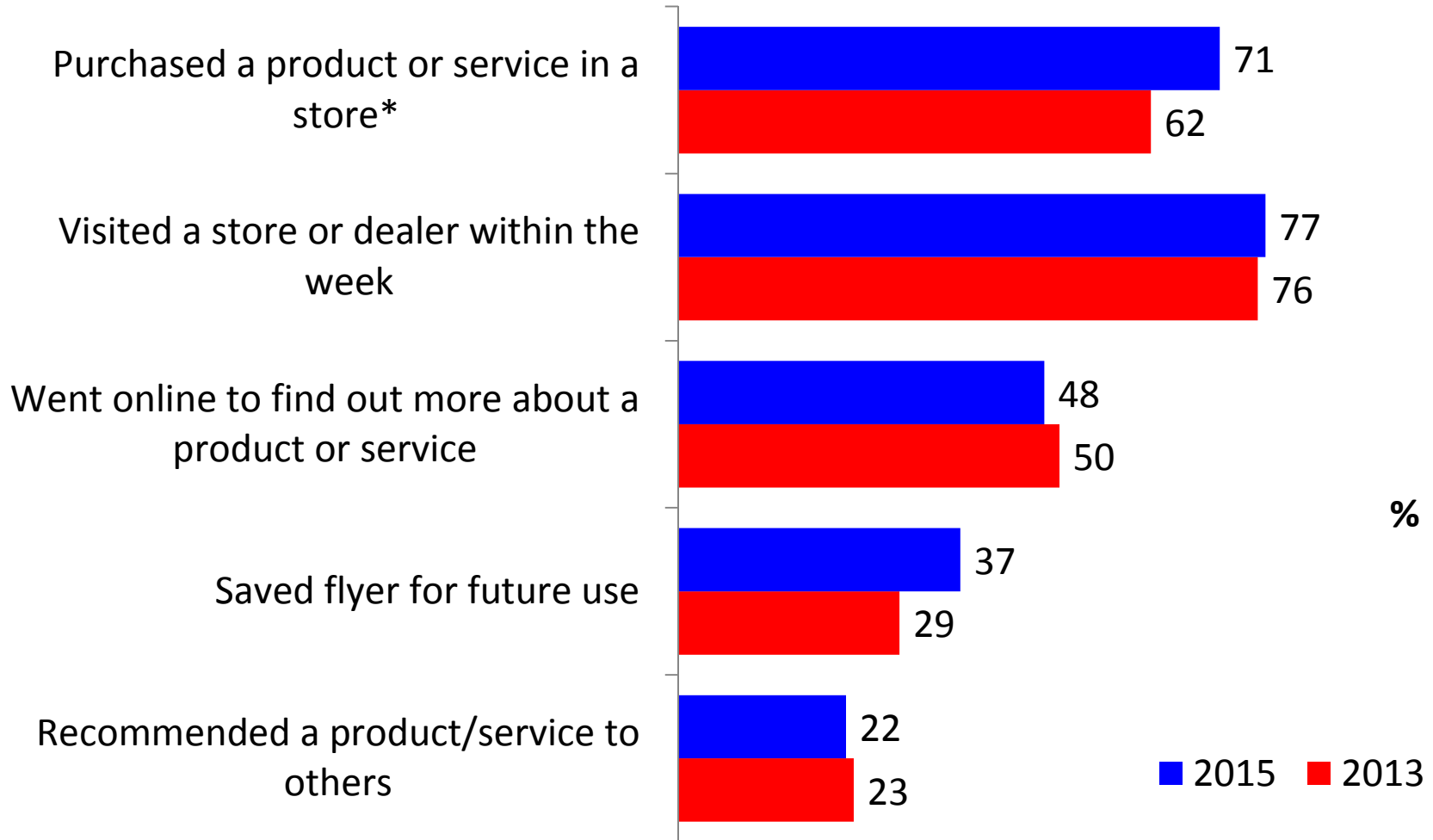
Source: FDSA 2015 Consumer Engagement Study, Totum Research



# Flyers Drive Action



Purchases increased, store visits returned to 2013 levels.



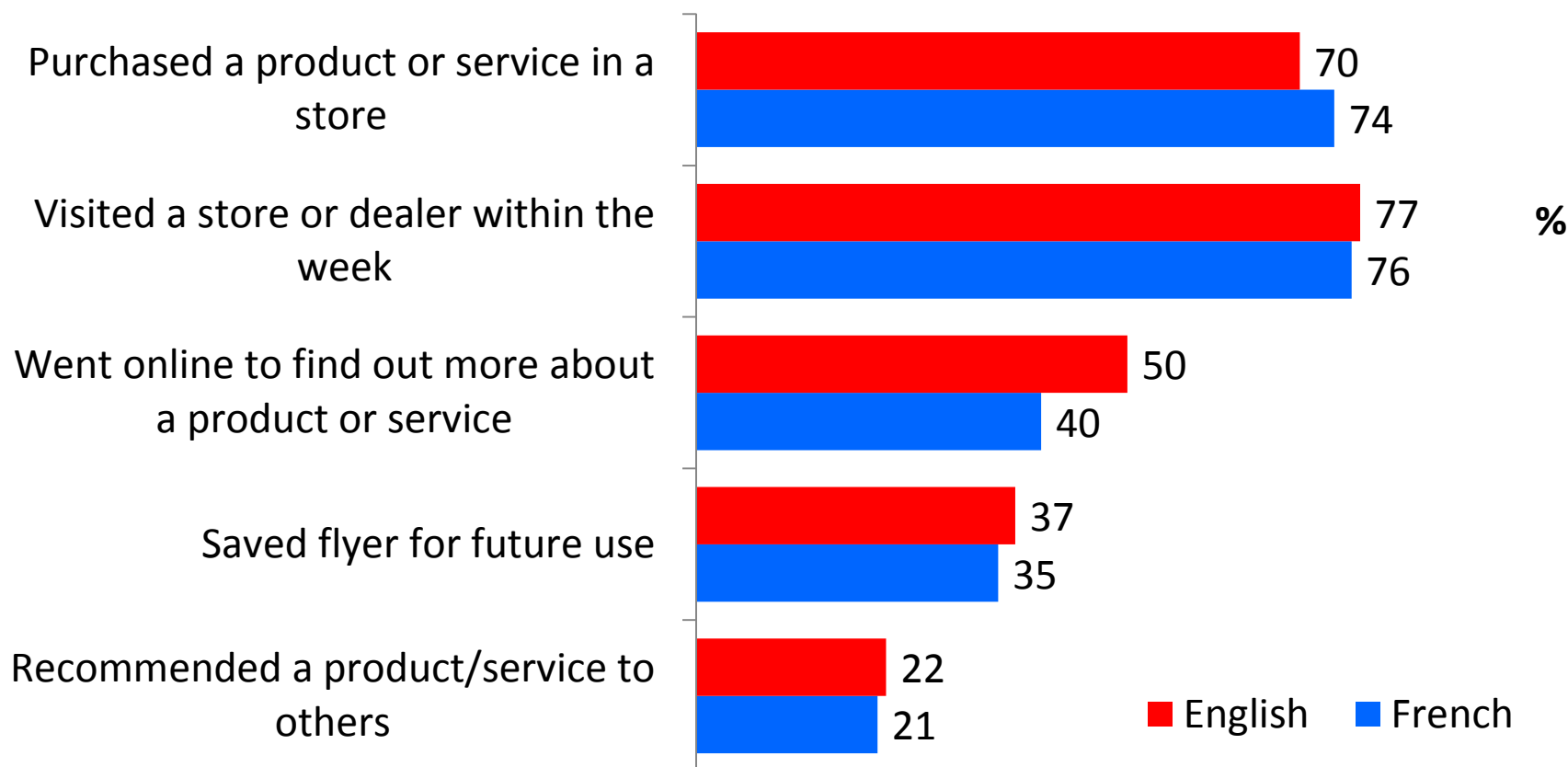
Question: Which of the following actions have you taken as a result of viewing a flyer?

Source: FDSA 2015 Consumer Engagement Study, Totum Research

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

# Flyers Drive Action

- English are more likely to go online for product information
- French are slightly more likely to buy in store
- In all other respects the two groups are similar



Questions: Which of the following actions have you taken as a result of viewing a flyer? In which language would you prefer to answer this questionnaire?

# Summary of Results

- More people are exposed to printed flyers than to online flyers, catalogues or coupons.
- There has been a slight increase in the use of printed flyers, online flyers and coupons in the past year while usage of the other flyer media has remained fairly constant.
- Most consumers perceive that they are using printed flyers about as frequently as they did a year ago while a quarter of them think they used online more frequently in the past year.
- Consumers prefer to have printed flyers delivered to their homes and online flyers delivered to their personal computers.
- They prefer their coupons in multiples and in printed format.
- The frequency of using flyers depends on the product(s) advertised.
- Consumers respond to flyers – three-quarters of them purchase products or visit stores or dealers after seeing a flyer.



FLYER DISTRIBUTION  
STANDARDS ASSOCIATION

# 2015 FDSA Consumer Engagement Study

[www.fdsa-canada.org](http://www.fdsa-canada.org)



*Totum Research Inc*