



European Consumer Perspectives on Leaflet Advertising

(ELMA Special Study 2025)



Quantitative insights across 10 European countries
Based on consumer responses on trust, usage and media impact



Introduction

What moves European consumers?

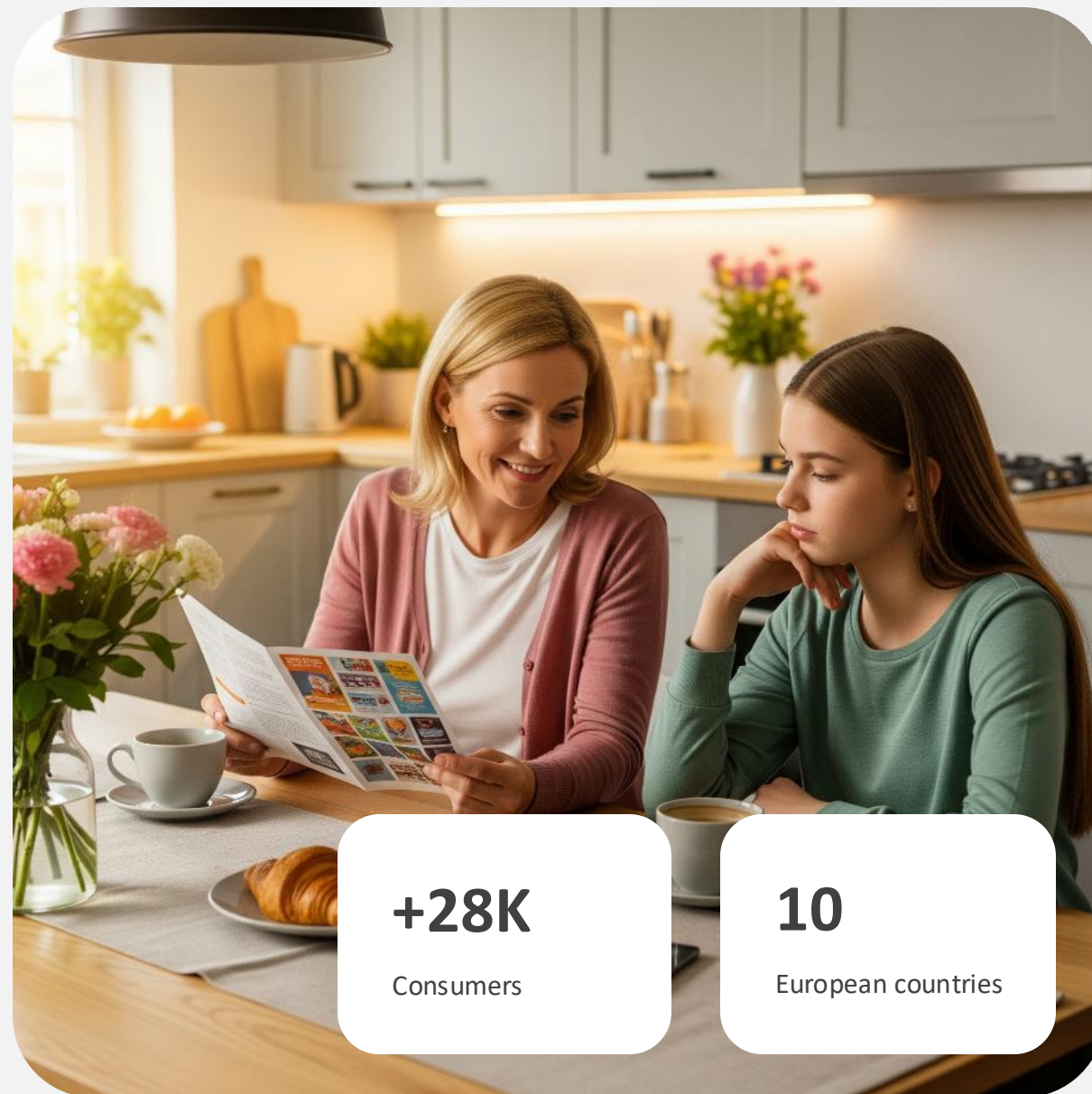
In an era of digital acceleration, one medium remains a constant in households across Europe: the printed leaflet. But how do people really feel about it?

This ELMA special study builds on the Two Sides Trend Tracker, exploring how leaflets are seen, trusted, and acted upon by 28,000 consumers in 10 European countries.

It asks one simple, powerful question:



What role does leaflet advertising play in modern consumer life?



+28K

Consumers

10

European countries



Quote

Leaflets are one of the most powerful touchpoints in retail – but we wanted to know how they are truly perceived by the people who receive them.

— Mark Davies, ELMA Chairman of the Board





+180m

Households

20+

European countries

About ELMA

Europe's Letterbox Network

ELMA – Unlocking the Power of the Letterbox Touchpoint in Europe

The European Letterbox Marketing Association (ELMA) is the voice of unaddressed print marketing across Europe - linking over 180 million households in 20+ countries through flyers, leaflets, catalogues, and samples.

Why Door Drop Works:

- Engages consumers at home, where decisions happen
- Data meets Print: Combining traditional media with geo-targeting, analytics & performance tracking
- Drives cost-effective reach and measurable impact—even in a digital world
- Integrates seamlessly with online channels and boosts campaign ROI



Print delivers: ELMA makes it smart, targeted, and future-ready.



Methodology Overview

Study Framework at a Glance

Two Sides

Trend Tracker

Comprehensive global
online survey

2025 Edition

Study design

12.400 consumer worldwide
4 additional questions by ELMA
for European consumers*

January 2025

Survey Period

Fieldwork conducted
across Europe

17 Countries

Consistent dataset

Identical questionnaire across all
regions, additional questions only
for Europe



Countries Covered

Europe:

Austria, Belgium, Denmark,
Finland, France, Germany, Italy,
Norway, Sweden, United
Kingdom

Report Commissioned

ELMA – European Letterbox Marketing
Association

Report layout & design

prospega GmbH and Pulsis Media GmbH

* supplied 4 additional questions for European consumers by ELMA Market Research Team can be found in the appendix



PERCEPTION

TRUST

USAGE

IMPACT

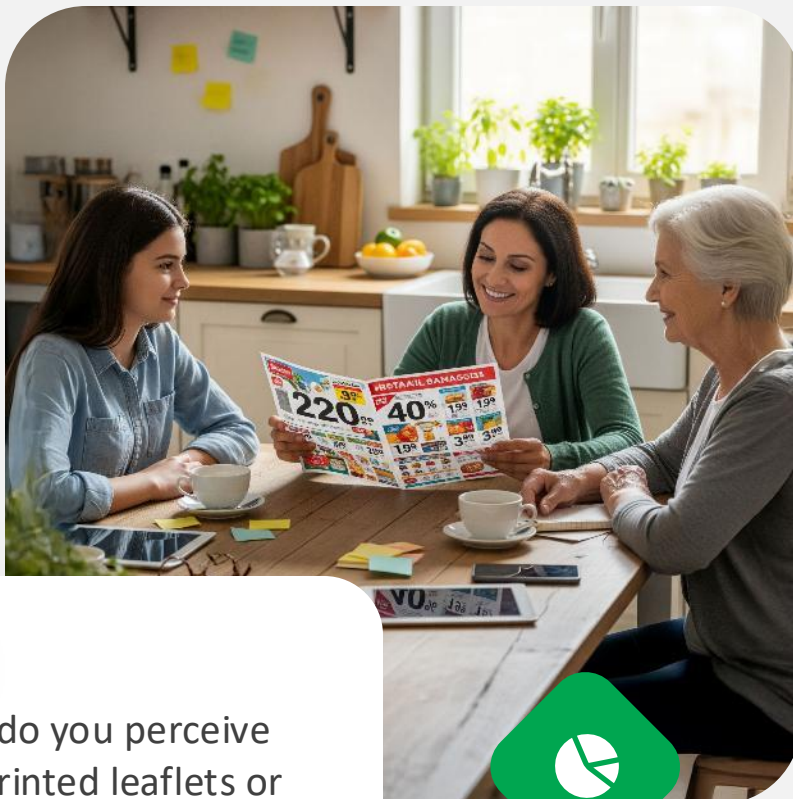
Perception

How do consumers perceive printed leaflets?



While digital media is everywhere, leaflets continue to earn consumer attention. But what do people really think about them?

This chapter explores how printed advertising is perceived in terms of usefulness, relevance, and credibility.



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How do you perceive the printed leaflets or catalogues you receive in your mailbox? *



Key Findings

Leaflets are still seen as informative, helpful – and relevant.

European consumers associate printed leaflets with positive attributes that support shopping decisions.

38%

consider them informative
Leaflets are valued for their content

33%

describe them as helpful
Supporting planning & comparison

27%

find them useful for new products
Discovery of current offers

22%

consider them relevant
Leaflets are seen as meaningful & timely



PERCEPTION

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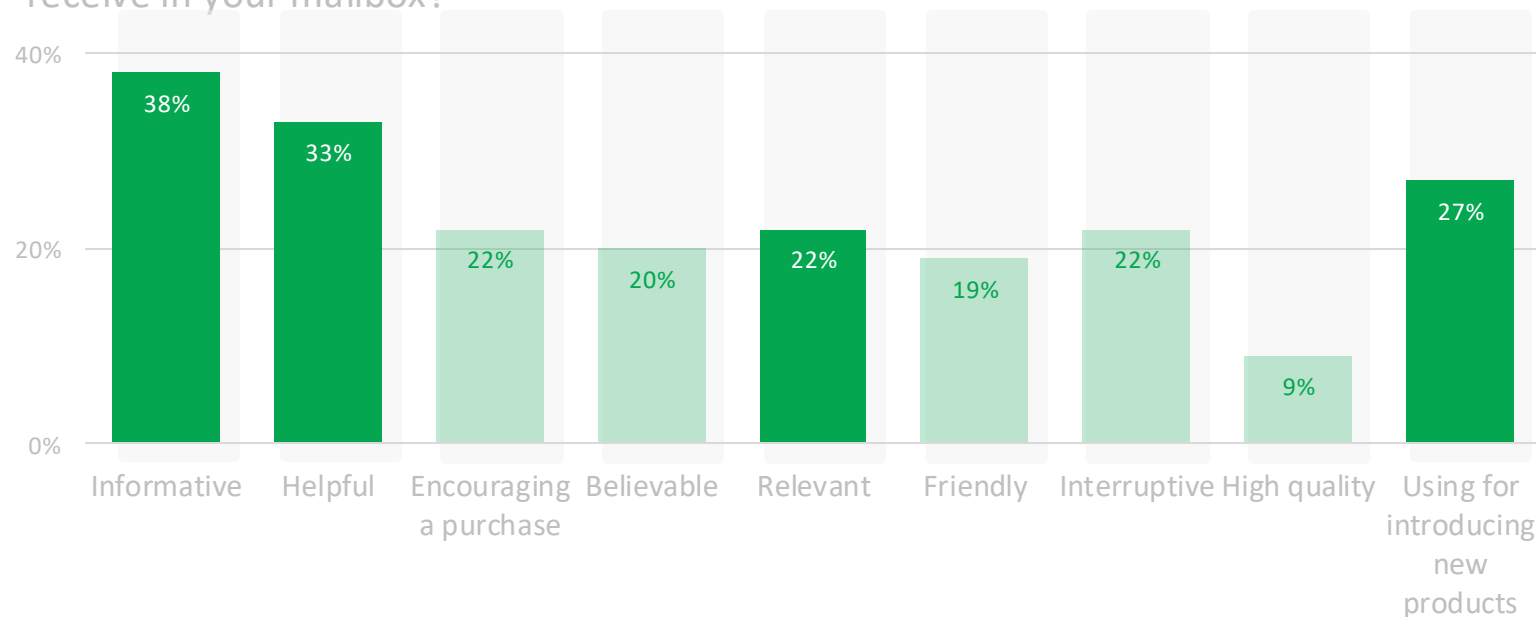
IMPACT

Consumer Perception

Full Perception Table

European Total

How do you perceive the printed leaflets or catalogues you receive in your mailbox?

☐ Selected Highlights

Top Insight

Leaflets remain useful – and trusted.

38%

Informative

Leaflets are most often described as informative – a sign of their role in helping consumers stay updated.



PERCEPTION

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Spotlight

Leaflets remain relevant.

Most Europeans find printed leaflets informative – supporting everyday purchase decisions.



PERCEPTION

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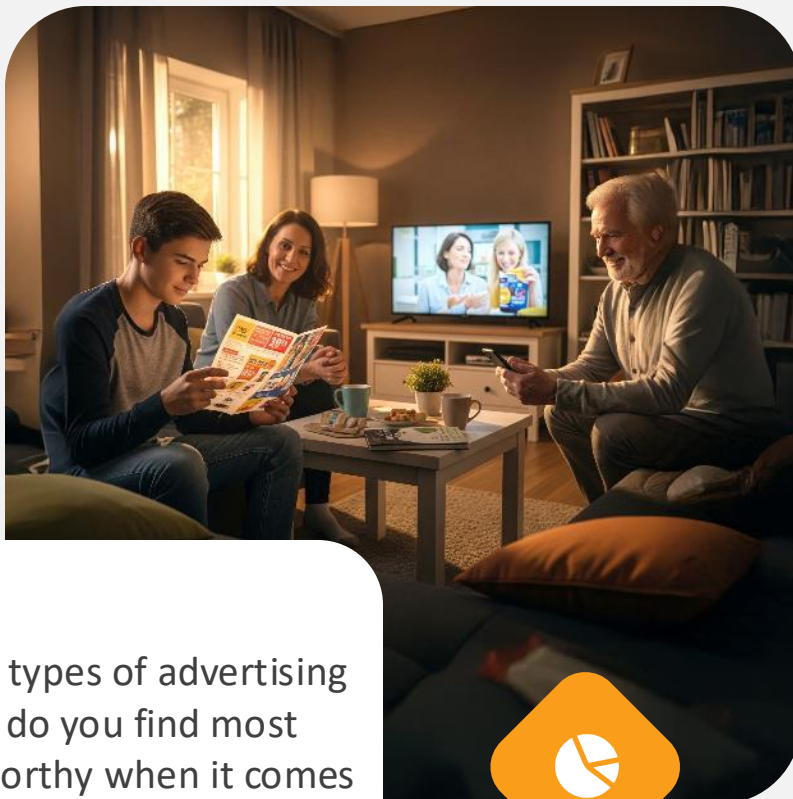
IMPACT

Trust

How much trust do consumers place in leaflets compared to other media?



While digital platforms dominate the media mix, trust remains a fragile asset. This chapter explores how printed advertising compares when it comes to consumer confidence.



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Which types of advertising media do you find most trustworthy when it comes to offers with price information? *



Key Findings

Which advertising formats earn the most consumer trust?

When it comes to trust in price-related advertising, printed leaflets clearly outperform digital formats and TV across Europe.

16%**Printed leaflets**

Most trusted by consumers for price credibility

14%**TV advertising**

Still valued, especially among older demographics

9%**Social Media**

Trust remains limited – especially for pricing

7%**Digital banners**

The least trusted format for price information

* all additional questions in the Two Sides Trend Tracker 2025 for European consumers by ELMA Market Research Team can be found in the appendix



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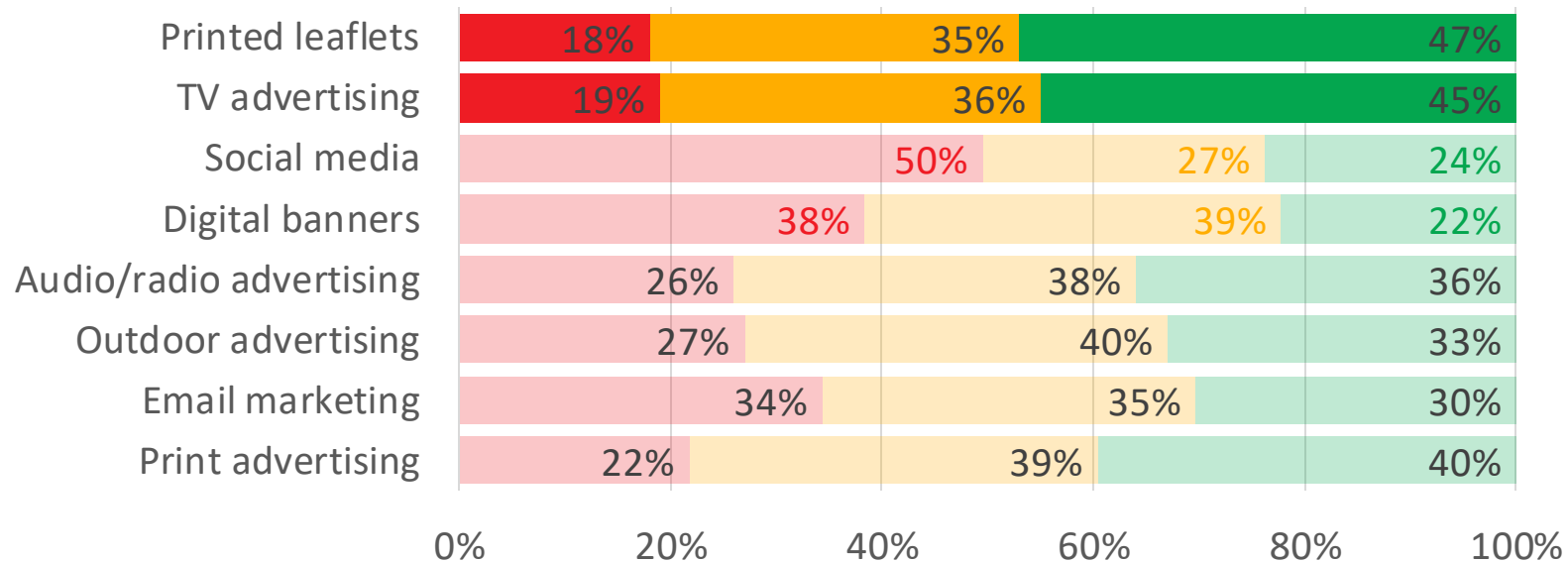
IMPACT

Trust Overview

Trust Table*

European Total

How much do Europeans trust different advertising formats? ■ low ■ moderate ■ high



Top Insight

Leaflets lead in consumer trust

47%

Rated “high” trust

Printed leaflets score the highest “4 & 5 out of 5” trust ratings across all ad formats in Europe.



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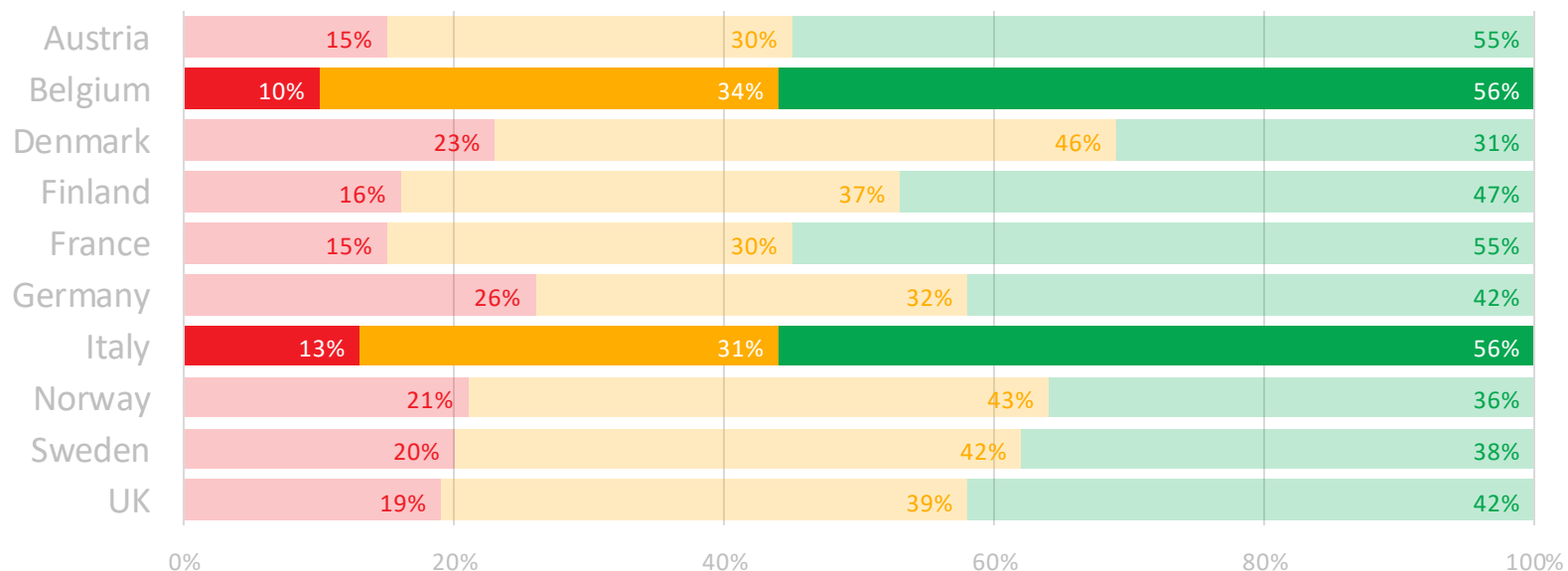
Trust by Country

In which European countries do ‘Printed leaflets’ enjoy the highest trust?

Countries

Country comparison: Trust in “Printed leaflets”

■ low ■ moderate ■ high



Simplified Version with 3 categories. Find “Full Trust Table” in the appendix



European Total

47% trust printed leaflets highly

56%

Belgium and Italy

Highest trust across Europe:
Printed leaflets are most
often rated “highly trusted”
in these countries.



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Spotlight

Leaflets lead in trust.

Printed leaflets are
trusted more than TV or
digital ads – especially
for price-related info.



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Usage

How often and how long are leaflets read?



While digital ads are often skipped or scrolled past, printed leaflets get real attention. This chapter reveals how often Europeans read them – and how much time they invest.



Key Findings

Leaflets hold attention – more than you'd expect.

European consumers don't just glance at printed leaflets – they actually read them. More than half spend over two minutes with them.

25%

2–5 minutes
Most common reading duration – not just a glance

23%

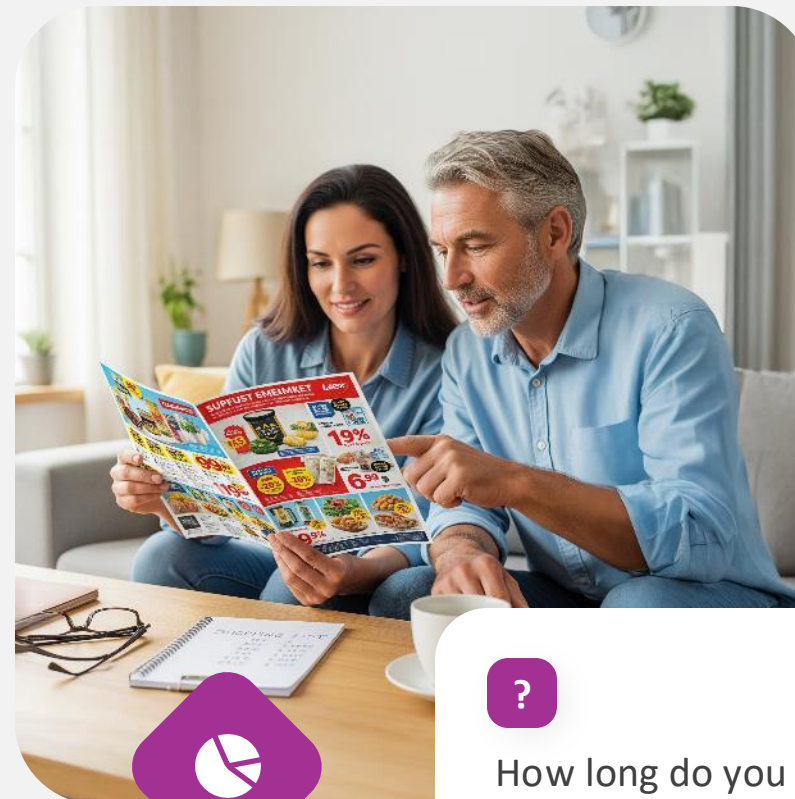
30 sec – 2 min
A short read, still with impact

16%

5–10 minutes
Almost one in five spend serious time with leaflets

12%

More than 10 minutes
A loyal core stays engaged longer than any digital ad ever could



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How long do you spend reading printed leaflets each week? *

* all additional questions in the Two Sides Trend Tracker 2025 for European consumers by ELMA Market Research Team can be found in the appendix



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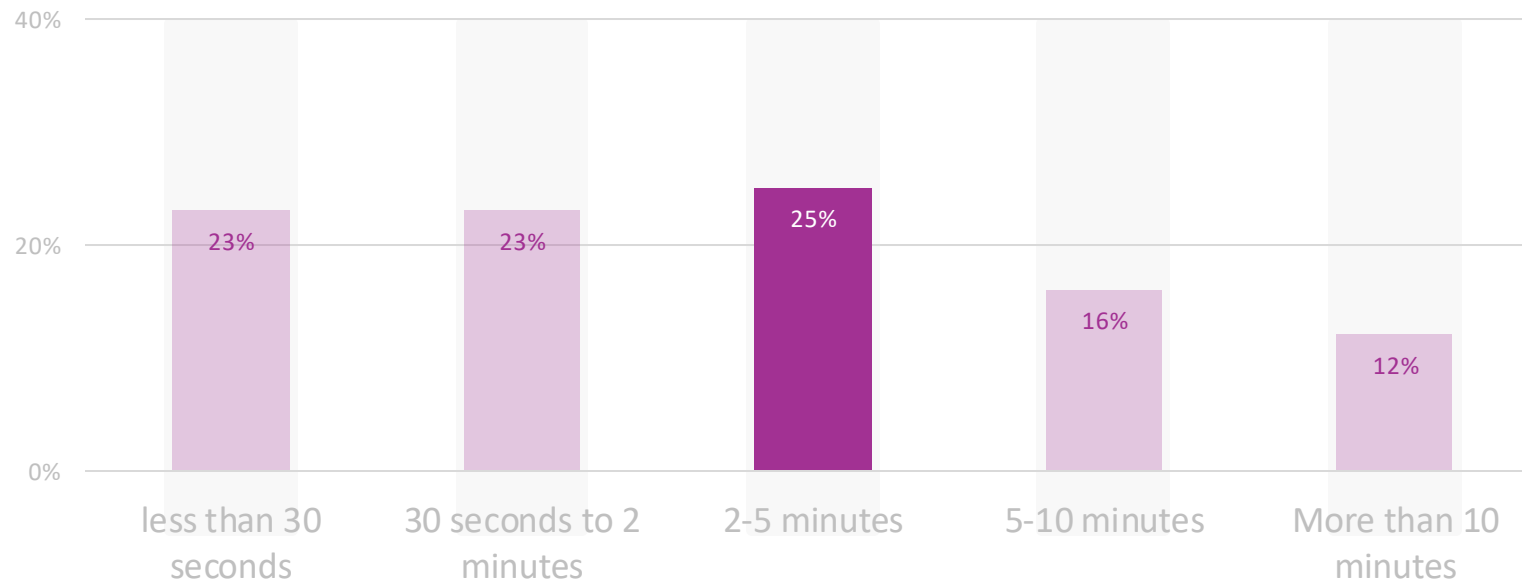
Usage Overview

Full Reading Time Table

European Total

How long do Europeans spend reading printed leaflets each week?

Top 1



Top Insight

Almost half read for more than 2 minutes

25%

2–5 minutes

This is the most common reading time for printed leaflets across Europe



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Leaflet Generations



**1922 –
1945**

Traditionalists

**1946 –
1964**

Baby Boomer

**1965 –
1979**

Generation X

**1980 –
1994**

Generation Y

**1995 –
2010**

Generation Z

**2011 –
2024**

Generation Alpha

**from
2025**

Generation Beta

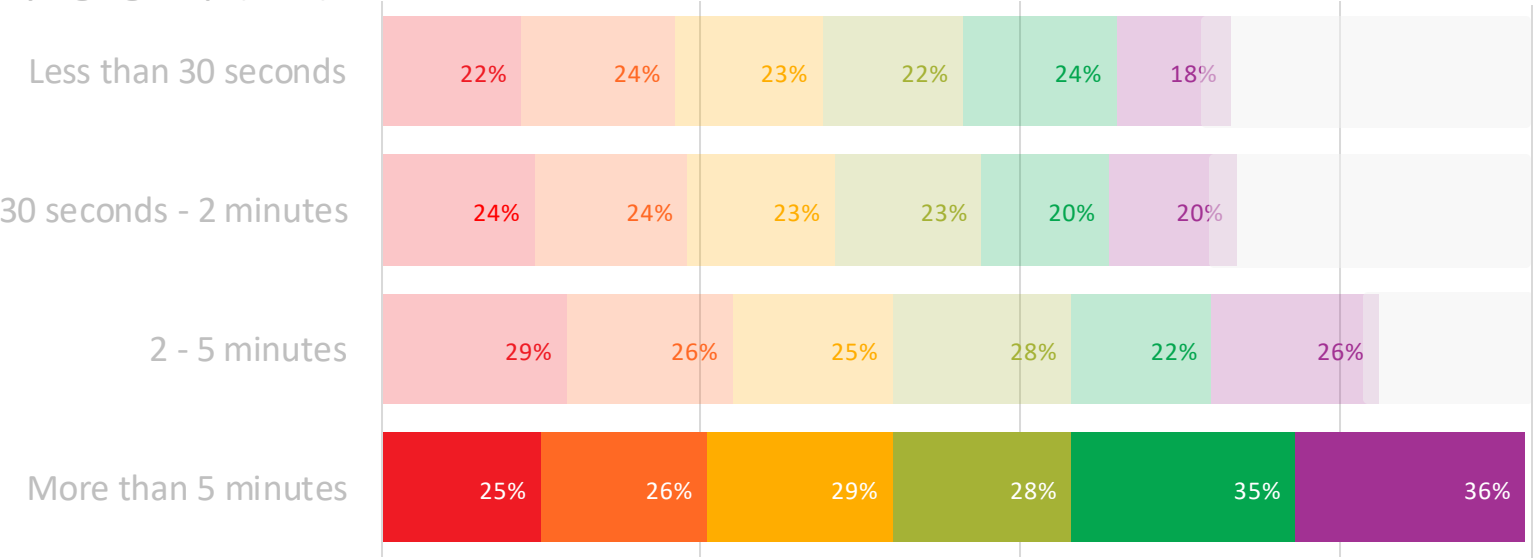


Demographic Comparison

How much time do different age groups spend reading?

Reading Time by Age Group

Weekly reading time for printed leaflets by age group (in %).



Top Insight

Leaflets are read by all age groups

3 Min.

Average Reading Time

Older Age Groups spend more reading time for leaflets than the younger generations but all generations engage



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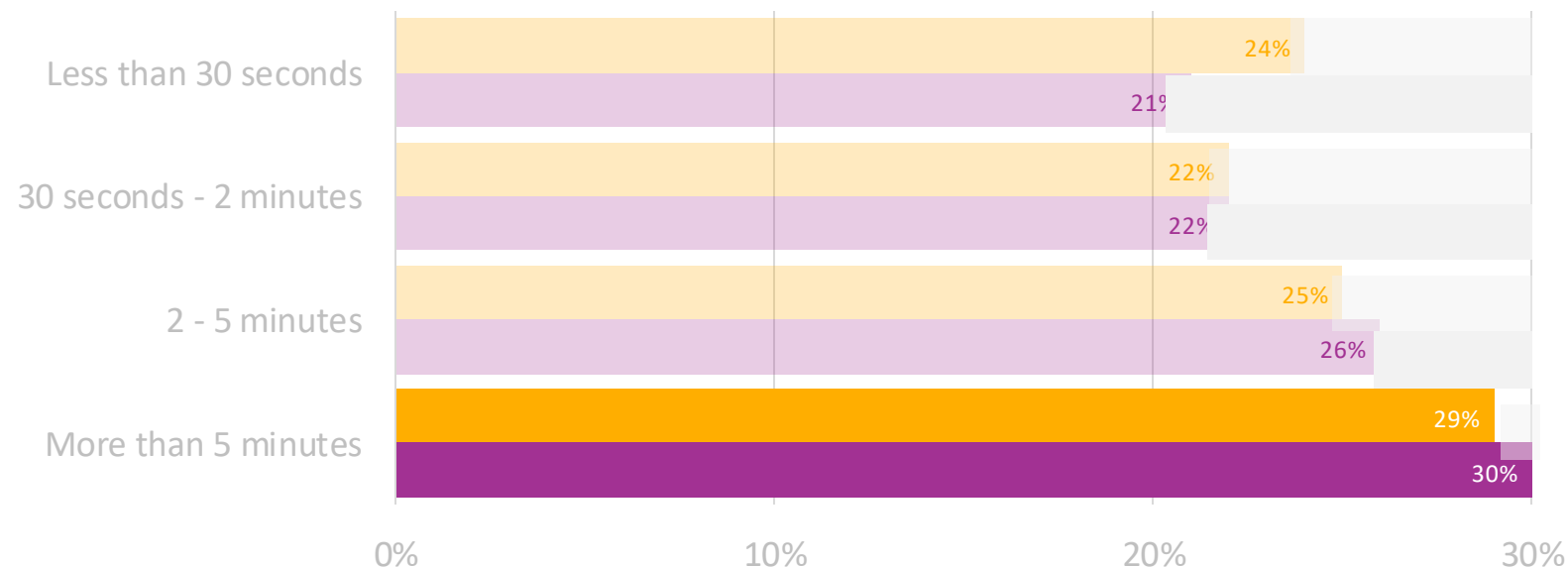
Demographic Comparison

How much time do different genders spend reading?

Reading Time by Gender

Gender comparison: Weekly reading time for printed leaflets (in %).

Female Male



Top Insight

Men spend more time reading leaflets

30%

> 5 minutes – Male

Males show the highest share in this time range – slightly ahead of females



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Spotlight

Leaflets earn attention.

Most don't just skim –
over half spend more than
2 minutes reading printed
leaflets.



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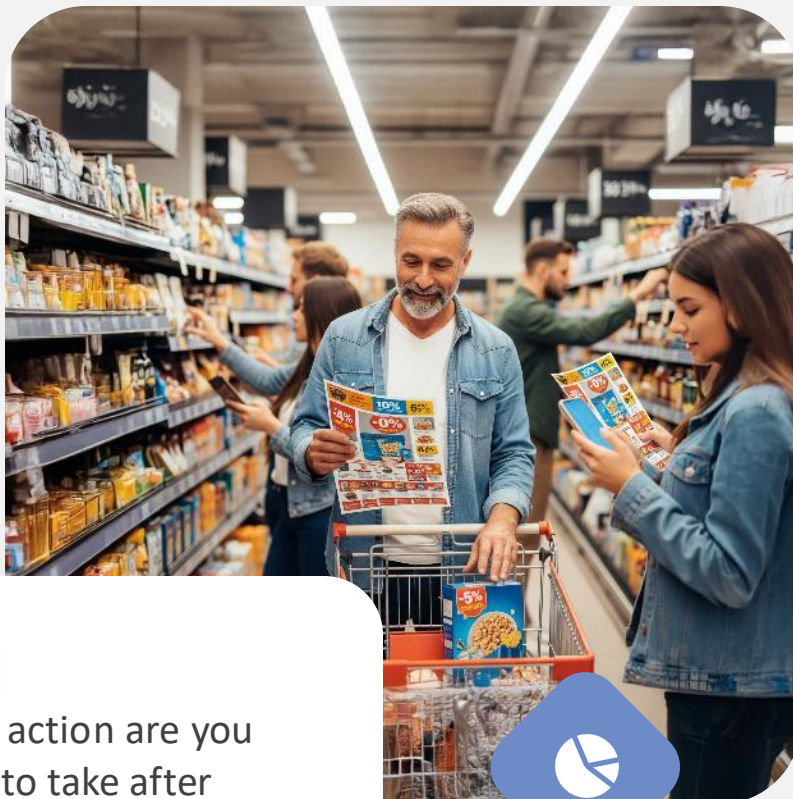
IMPACT

Impact

What actions follow after reading a leaflet?

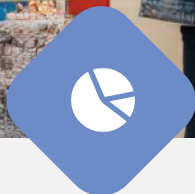


While digital ads often pass by unnoticed, printed leaflets inspire action. This chapter explores what happens after consumers read them – from searching and buying to sharing.



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What action are you likely to take after receiving printed leaflets or catalogues? *



Key Findings

What happens after reading a leaflet?

Printed leaflets spark real action – from product searches to store visits. These four key reactions show their lasting impact.

42%

Browse the leaflet
Most readers take the time to explore what's inside – attention that digital formats rarely get

31%

Visit a store
Leaflets don't just inform – they bring people into shops

27%

Plan a shop
A quarter of readers use leaflets to actively prepare their next purchases.

20%

Buy online
Leaflets drive digital action – one in five go straight to purchase

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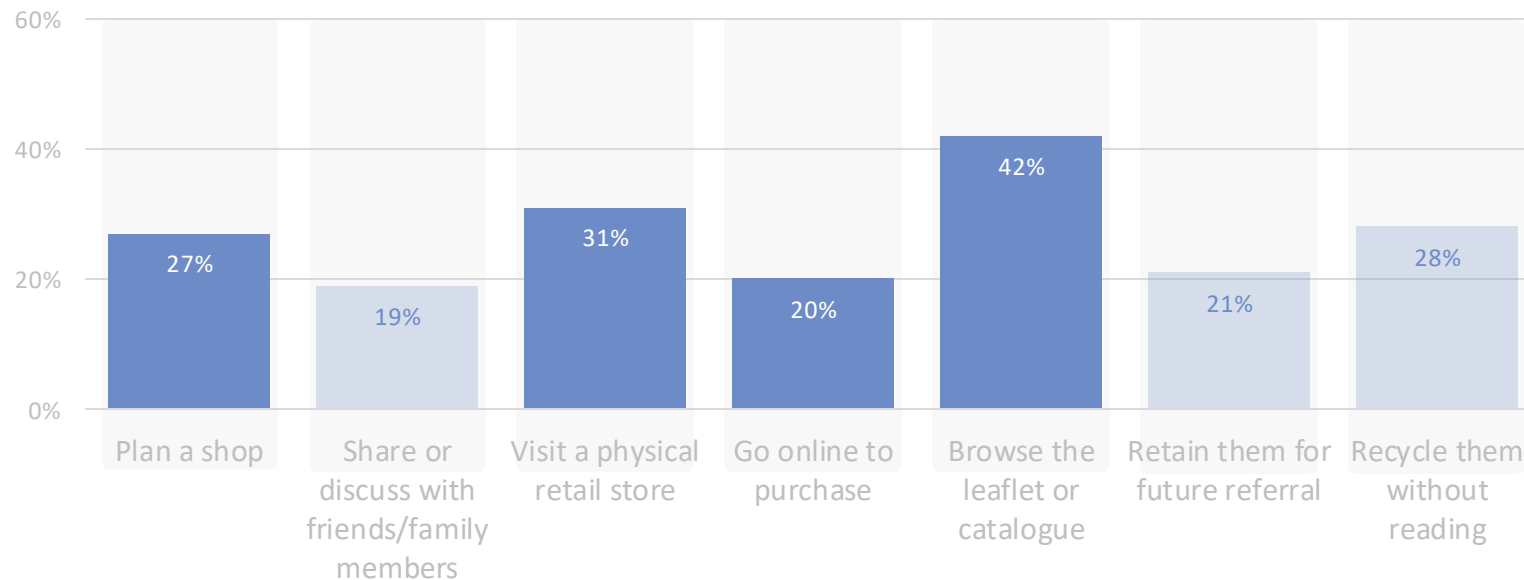
Impact Overview

How do Europeans respond after receiving a printed leaflet?

European Total

Key reactions after reading.

☐ Selected Highlights



Top Insight

Leaflets drive real action

42%

Browse the leaflet

Nearly half of Europeans explore printed leaflets in detail – showing strong attention and engagement.



PERCEPTION

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IMPACT

Spotlight

Printed. Seen. Used.

Over 4 in 10 browse the leaflet – the first step to action.



Outlook

What's next for printed leaflets in a changing media world?



While digital ads are often ignored, printed leaflets continue to deliver impact. This final chapter puts the results into perspective – and shows what they mean for retailers and brands moving forward.



Outlook

What the numbers reveal – and why they matter

Printed leaflets succeed where digital formats often fall short: they are trusted, read thoroughly, and drive action. The results are clear – skipping print means missing out on attention, credibility, and ultimately sales. Especially in price-driven communication, these effects are too important to ignore.

- 1** Trust is the new currency – and print leads
- 2** Attention isn't automatic – leaflets create focus
- 3** From browsing to action – every second person responds





Outlook

Printed advertising in a digital age

Printed leaflets are not a relic – they're a performance driver in today's media mix. They create relevance where digital formats often fall short – with high attention, real trust, and measurable consumer response. If you aim for true campaign impact, print deserves a place in your strategy – especially in offer-driven retail.



**Print delivers what many
digital formats only promise
– real response**

Thank You

For Joining This Presentation



Let's keep the conversation going.

Reach out to discuss how printed media can boost your next campaign.