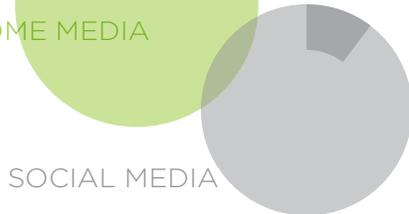


# MARKETING COMMUNICATIONS EXPENDITURE SURVEY 2012



**Summary Report**  
February 2013

Online survey platform and data work provided by Forum Research



# ABOUT THE ASSOCIATION OF CANADIAN ADVERTISERS

For more than 90 years the ACA has been Canada's association of record for marketers, with an unparalleled track record in driving marketing success for our members. Four key factors make up The ACA Edge that sets the association in a class apart from other industry groups.

-  **For Marketers Only.** Membership in the ACA is only open to client marketers. This is a crucial point of difference between the ACA and other associations whose members can include agencies, the media and other suppliers. By restricting membership to marketers only, it means the ACA has no other vested stakeholder interests that might compromise or mitigate our efforts on behalf of marketers.
-  **ROI Focused.** At the ACA we are driven to assist our members in maximizing the value of their investments in all forms of marketing communications.
-  **Insights & Intelligence.** The ACA sets the industry standard for its ever-expanding suite of products and services that give our members the necessary tools to enhance their MarCom understanding and expertise.
-  **Issues Leadership.** The ACA is unrelenting in its defense of the right of marketers to commercial free speech, and in its demand for a media marketplace that is accountable for the services purchased. While other associations are often absent in front of government and regulatory bodies, the ACA is always there to ensure the voices and priorities of marketers are heard, understood and acted on.

For more information, visit [www.ACAweb.ca](http://www.ACAweb.ca).

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# MARKETING COMMUNICATIONS EXPENDITURE SURVEY

**Summary Report**  
February 2013

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# BACKGROUND / PURPOSE

This study's purposes are to provide insight into the current use of media and other MarCom channels, and to identify areas where media and other MarCom channels are changing within budgets and will continue to change in the near future.

## With these objectives the study:

-  **measures** media expenditures in the context of their use as marketing and communication channels
-  **tracks** changes in MarCom channel choices
-  **examines** attitudes to traditional and new media and their impact, if any, on expenditure patterns
-  **examines** individual company use of social media platforms as a marketing tool.

We trust you will find this summary report to be a useful resource when planning your MarCom programs.

# DATA COLLECTION

**Methodology** Link to online survey was e-mailed to a senior marketer at each ACA member company, and to other major Canadian advertisers.

**Response** 76 respondents participated in the online survey.  
72 respondents provided complete budget information.

**Fieldwork** Survey was in field from October 11, 2012 -  
December 14, 2012

# IMPORTANT NOTATIONS / CAVEATS

The following analysis is intended to provide a reference for marketers interested in assessing their decisions for MarCom budget allocation against a sample of industry marketers.

Data analyses were conducted by the ACA. The data collected and analyzed does not represent a statistically significant sample base. While respondent organizations reflect a full range of industries, the Packaged Goods category, followed by the Services category, are more highly represented. This data cannot be projected to the total Canadian universe of marketers.

If other analysis is required, please contact:

## Susan Charles

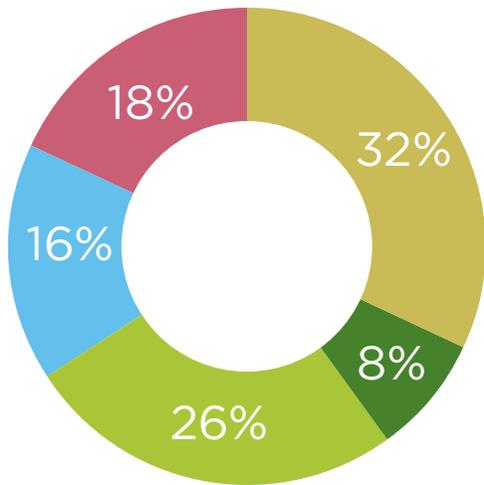
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# SAMPLE PROFILE

The respondent base represents a cross section of industry categories with approximately one-third of the sample falling within the Packaged Goods category.

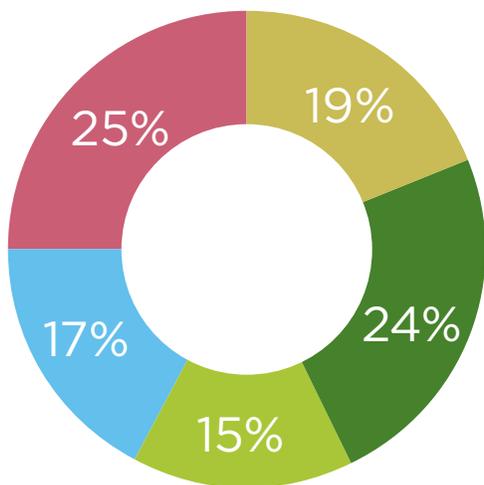


**Sample By Industry Category (N=76)**

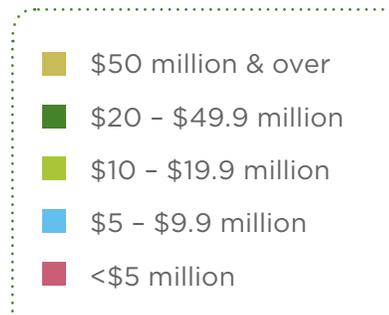


# SIZE OF MARCOM BUDGETS

For analysis, budgets are classified into one of five spending ranges, from a low of \$1 million to a high of \$200 million. The total MarCom budget for the sample base is \$2.3 billion, with an average MarCom budget of \$32.1 million. Size of MarCom budget for the respondent sample is distributed across the spectrum from <\$5 million to over \$50 million.



**Sample By Size of MarCom Budget (N=72)**



# EXECUTIVE SUMMARY

The results of this survey highlight the use of the various MarCom channels by the survey respondents in terms of overall budget allocation, inclusion within MarCom programs on a per respondent basis, and the relative confidence in the specific channels to deliver against MarCom objectives. Depending on the bases for the analysis, the perspective can vary. For example, TV received the greatest overall allocation of budget, yet the internet is the MarCom channel used by the greatest number of respondents.

Overall, TV is still alive and continues to dominate the MarCom programs for the majority of respondents. However, the migration of MarCom budgets to digital channels (primarily internet) continues, and the internet has surpassed TV to become the channel included in the most number of respondent MarCom programs.

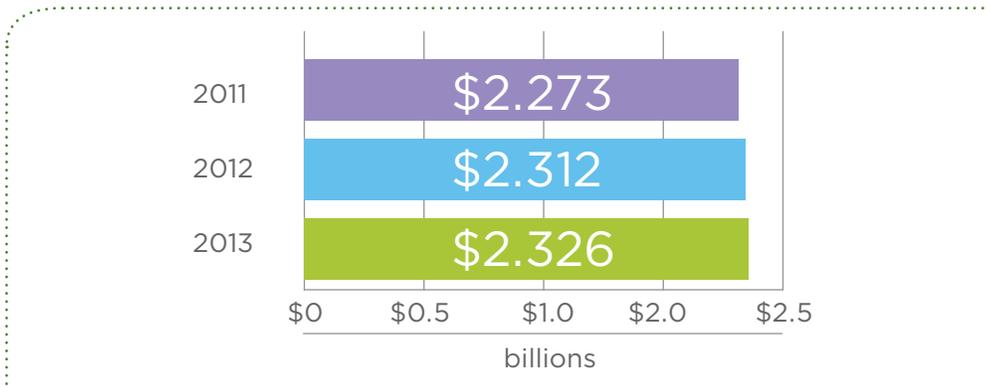
- Overall, total MarCom budgets tend to be stable with over 85% of respondents reporting budget changes falling within +/- 10%.
- TV continues to dominate, receiving over a third of total MarCom budget allocations. Its share of spending (by respondent sample base) is over 3 times greater than the internet, which attracts the second highest share of total MarCom budgets.
- Respondents indicate an average of 7.3 MarCom channels used in current-year programs. There is a positive correlation between the size of MarCom budget and the number of MarCom channels.
- In contrast to the dominant share of total MarCom budget allocation to TV, the internet surpassed TV with highest number of respondents including it in their MarCom programs. 82% and 86% of respondents, respectively, included internet in programs for current- and next-year, versus 80% and 78% for TV.
- However, when analyzing the number of respondents who have a dominant share (>30%) of MarCom budget allocated to a single MarCom channel, 45% of respondents use TV, versus only 2 out of 72 respondents who use the internet as a dominant channel.
- TV is the MarCom channel that received the highest confidence ratings for delivering against MarCom objectives. Search was ranked second, followed by the internet.

# SUMMARY OF FINDINGS

## 1 Year-Over-Year Change in MarCom Budget

Overall, total MarCom spending reported is projected to be flat in 2013.

### Total MarCom Expenditure



### Total MarCom expenditure claimed by 72 respondents

Previous Year (2011)	Current Year (2012)		Next Year (2013)	
Total (\$000)	Total (\$000)	% chg	Total (\$000)	% chg
\$2,272,610	\$2,311,750	1.7%	\$2,325,728	.06%

The vast majority of respondents report their change in MarCom expenditures within a range of +/- 10%.

### Number of respondents by % change in MarCom budget (BASE=76)

Variation	ACTUAL (2012 vs 2011)		PROJECTION (2013 vs 2012)	
	Count	%	Count	%
>10% increase	7	9%	4	5%
No change (+/- 10% range)	64	84%	67	88%
>10% decrease	5	7%	5	7%

The changes in MarCom budget levels by industry category are detailed in the following table. Of note:

- Retail and Packaged Goods categories report constant budget levels with respondents falling within the +/- 10% range for 'next' versus 'current' year.
- Consumer Durables category represents the greatest degree of budget volatility, although only on a very small sample base.

Number of respondents by % change in MarCom budget (BASE=76)

	Variation	>10% increase	No Change (+/- 10% range)	>10% decrease
Packaged goods (32% of respondents)	ACTUAL	13%	88%	0%
	PROJECTION	4%	96%	0%
Consumer Durables (8% of respondents)	ACTUAL	33%	50%	17%
	PROJECTION	0%	67%	33%
Services (26% of respondents)	ACTUAL	5%	85%	10%
	PROJECTION	10%	85%	5%
Retail (16% of respondents)	ACTUAL	8%	92%	0%
	PROJECTION	0%	100%	0%
Other (18% of respondents)	ACTUAL	0%	86%	14%
	PROJECTION	7%	79%	14%

# 2

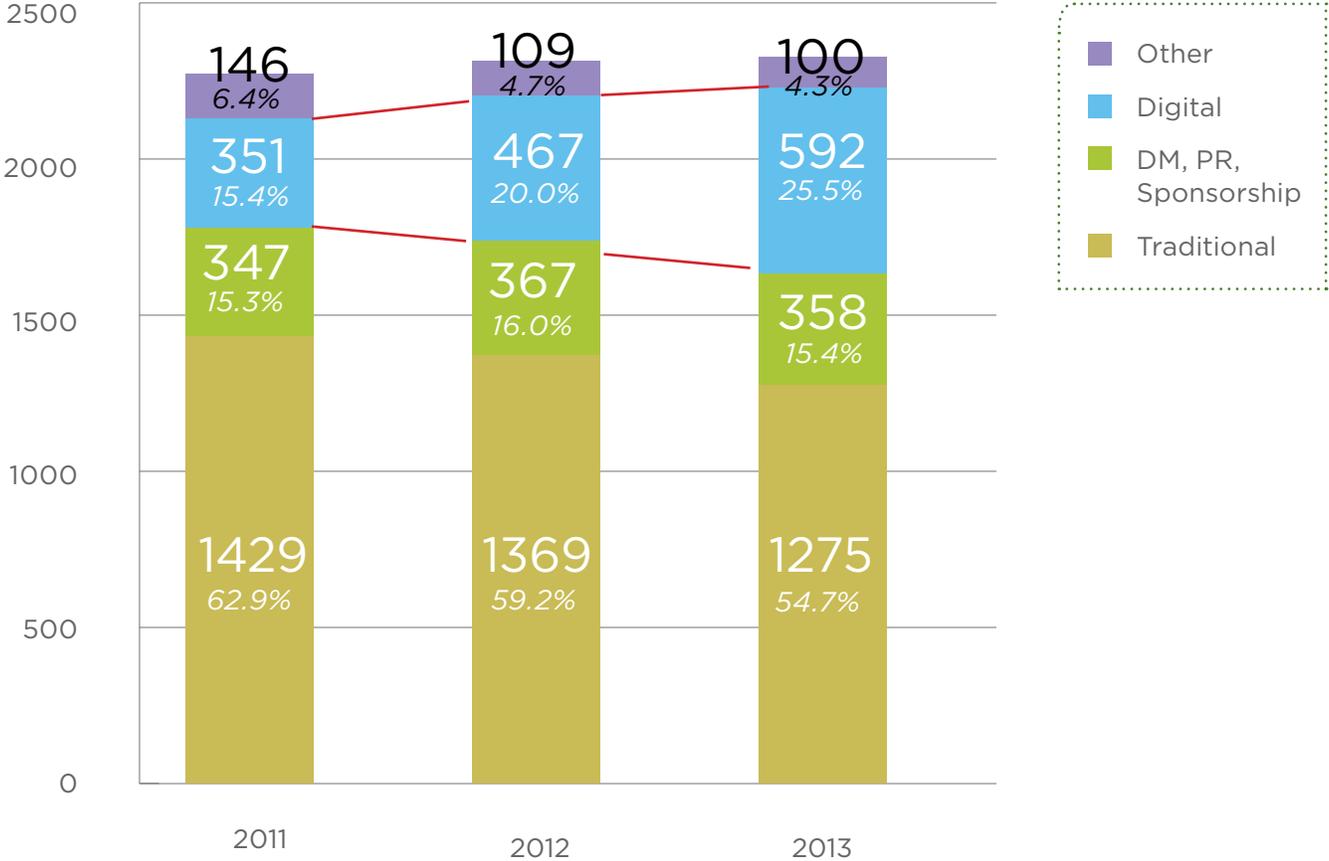
## Total MarCom Budget Allocation by MarCom Channel

Respondents were asked to report their MarCom budget allocation across 13 identified MarCom channels. Total MarCom budget allocation across MarCom channels has seen marginal shifts when viewed in the context of total expenditures for the 72 respondents.

TV continues to dominate (36.1%) followed by the internet (11.1%). They account for the largest share of dollars in 2012 and are projected to do so in 2013. As expected, digital MarCom channels are gaining share of total MarCom budgets at the expense of the traditional mass channels. Over the three-year period, the four digital channels have gained collectively 10.1 share points. Conversely, the traditional mass MarCom channels have experienced a collective share decline of -8.2 share points over the 3-year survey period.

For detailed results, please see table on the following page.

**Total Expenditure by MarCom Channel (\$000)**



Total expenditure by MarCom channel (N=72)

	Previous Year (2011)		Current Year (2012)		Next Year (2013)		Share point change over 3-year period
	Total (\$000)	Share (%)	Total (\$000)	Share (%)	Total (\$000)	Share (%)	
<b>Total Expenditure</b>	<b>2,272,610</b>	<b>100.0%</b>	<b>2,311,750</b>	<b>100.0%</b>	<b>2,325,728</b>	<b>100.0%</b>	
TV	867,128	38.2%	835,611	36.1%	791,879	34.0%	
Radio	133,732	5.9%	137,908	6.0%	126,632	5.4%	
Magazines	79,045	3.5%	62,831	2.7%	51,590	2.2%	
Newspapers	214,531	9.4%	206,137	8.9%	175,180	7.5%	
Out-of-Home	135,057	5.9%	126,390	5.5%	129,758	5.6%	
<b>Subtotal - Mass MarCom Channels</b>		<b>62.9%</b>		<b>59.2%</b>		<b>54.7%</b>	<b>-8.2 pts</b>
Direct Marketing	83,794	3.7%	100,574	4.4%	95,364	4.1%	
PR	57,996	2.6%	61,428	2.7%	64,877	2.8%	
Sponsorship	204,623	9.0%	205,030	8.9%	197,611	8.5%	
<b>Subtotal</b>		<b>15.3%</b>		<b>16.0%</b>		<b>15.4%</b>	<b>+0.1 pts</b>
Internet Advertising (display/video)	200,758	8.8%	257,198	11.1%	298,218	12.8%	
Social Media	86,784	3.8%	118,771	5.1%	149,369	6.4%	
Search	49,812	2.2%	71,707	3.1%	104,390	4.5%	
Mobile	13,002	0.6%	18,936	0.8%	40,994	1.8%	
<b>Subtotal - Digital MarCom Channels</b>		<b>15.4%</b>		<b>20.0%</b>		<b>25.5%</b>	<b>+10.1 pts</b>
Other	146,347	6.4%	109,232	4.7%	99,866	4.3%	

### 3 Number of MarCom Channels Used by Respondent

MarCom budgets are fragmented. Respondents used an average of 7.3 MarCom channels in the current year indicating a minor increase over the previous year, and are predicting almost the same average number of MarCom channels for 2013.

There are a declining number of respondents using 1-4 channels, with 5-8 channels becoming the choice for 50% of respondents for next year's programs. Almost 40% of respondents use 9-12 MarCom channels.

#### # MarCom Channels Used Per Respondent



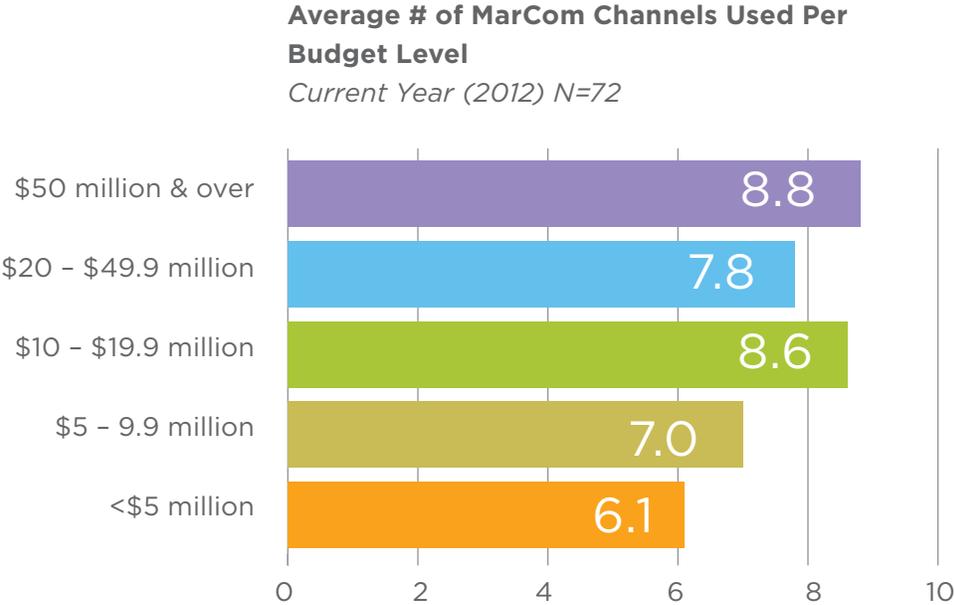
For more details, refer to the chart below.

# MarCom channels used per respondent (N=76)			
	Last Year (2011)	Current Year (2012)	Next Year (2013)
1	11%	5%	5%
2	1%	4%	3%
3	4%	3%	1%
4	5%	5%	4%
<b>Subtotal 1-4</b>	<b>21%</b>	<b>17%</b>	<b>13%</b>
5	5%	7%	12%
6	14%	11%	11%
7	22%	17%	16%
8	8%	9%	11%
<b>Subtotal 5-8</b>	<b>49%</b>	<b>44%</b>	<b>50%</b>
9	17%	12%	9%
10	4%	13%	13%
11	5%	9%	8%
12	3%	5%	8%
<b>Subtotal 9 - 12</b>	<b>29%</b>	<b>39%</b>	<b>38%</b>
<b>Average:</b>	<b>6.6</b>	<b>7.3</b>	<b>7.4</b>

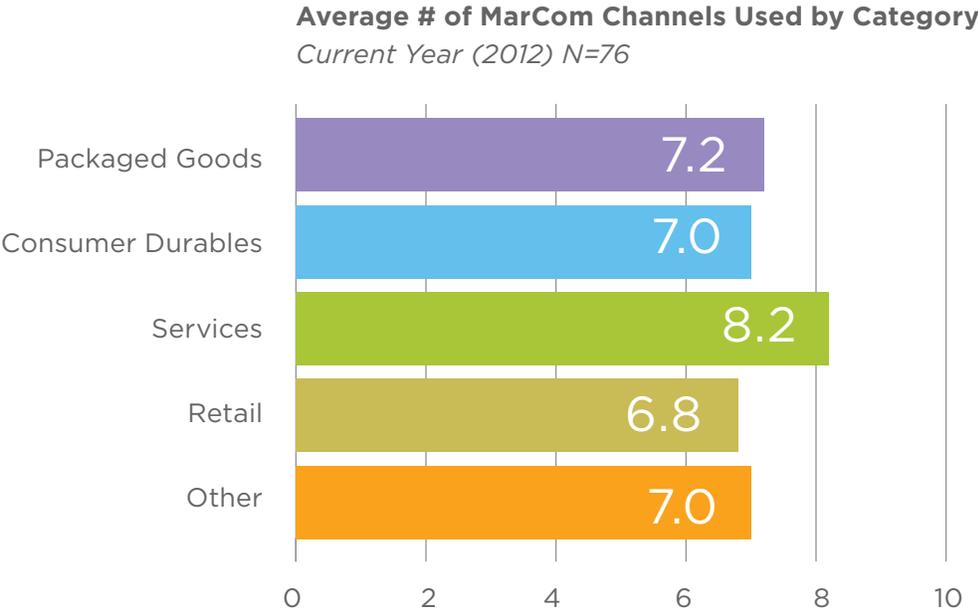
# 4

## Number of MarCom Channels Used per Budget Level and by Industry Category

As expected, respondents with larger MarCom budgets use a greater number of MarCom channels.



Respondents within the Services category indicate using the highest average number of MarCom channels (8.2).



## 5

## Choice of MarCom Channels Used per Respondent

In current and next year, more respondents indicate use of internet versus TV.

Albeit at lower numbers versus TV and the internet, there was an increase in the number of respondents using social media, search, sponsorship, direct marketing, PR and mobile in 2012 versus 2011. There is also a noted increase in the number of respondents projecting the use of mobile in 2013. Conversely, there is virtually no change in the number of respondents projecting to use the traditional mass MarCom channels, such as radio, magazines, newspapers and out-of-home, for 2013.

Choice of MarCom channels used per respondent (N=76)

	% of respondents	% of respondents	% of respondents
	Last Year (2011)	Current Year (2012)	Next Year (2013)
TV	78%	80%	78%
Radio	51%	55%	51%
Magazines	55%	57%	55%
Newspapers	51%	51%	49%
Out-of-Home	55%	57%	54%
Direct Marketing	37%	46%	47%
PR	49%	54%	55%
Sponsorship	51%	57%	55%
<b>Internet advertising (display/video)</b>	<b>78%</b>	<b>82%</b>	<b>86%</b>
Social Media	58%	72%	72%
Search	50%	62%	64%
Mobile	13%	25%	41%
Other	36%	37%	36%

## 6

## Number of Respondents Allocating >30% of MarCom Budget by Channel

45% of respondents allocate a dominant share (>30%) of their MarCom budgets to TV over the three survey years.

It is interesting to note that the internet has only reached a dominant level of budget allocation by 2 of the 76 respondents, in spite of the fact it is used by more respondents than any other MarCom channel.

Number of respondents allocating >30% of MarCom budget by channel (N=76)

	Last Year (2011)	Current Year (2012)	Next Year (2013)
TV	33 (43%)	34 (45%)	34 (45%)
Radio	4	3	2
Magazines	4	3	1
Newspapers	6	5	3
Out-of-Home	1	1	1
Direct Marketing	1	2	2
PR	1	1	1
Sponsorship	5	5	5
Internet advertising (display/video)	2	2	4
Social Media	1	1	2
Search	0	0	0
Mobile	0	0	0
Other	7	4	4
No dominant channel	11 (15%)	15 (20%)	17 (22%)

*Note: "Dominant Channel" has been arbitrarily pegged at >30% share of respondent's total MarCom budget.*

# 7

## Use of Social Media Platforms as a Marketing Tool

Facebook is the dominant social media platform used by survey respondents in all three years of the survey period. YouTube inclusion in MarCom plans is increasing and projected to match Facebook in 2013. All other platforms are at much lower numbers but all are increasing year over year.

The number of respondents not using a social media platform is projected to fall to 5% in 2013.

Use of social media platforms as a marketing tool						
	Last Year (2011)		Current Year (2012)		Next Year (2013)	
	N=70		N=76		N=75	
	# of Resp	% of Resp	# of Resp	% of Resp	# of Resp	% of Resp
<b>Facebook</b>	59	<b>84%</b>	65	<b>86%</b>	66	<b>88%</b>
Google +	16	23%	25	33%	32	43%
LinkedIn	12	17%	19	25%	27	36%
Photo Sharing (Instagram, Tumblr, Imgur, etc.)	4	6%	18	24%	24	32%
Pinterest	3	4%	23	30%	31	41%
Twitter	34	49%	47	62%	55	73%
<b>YouTube</b>	45	64%	60	79%	65	<b>87%</b>
Other	8	11%	11	14%	12	16%
Do not Use	6	9%	6	8%	4	5%

## 8

## Confidence Ratings by MarCom Channels

On a 10 point scale (1 = not at all confident, 10 = extremely confident), respondents were asked how confident they are that each of the following media can deliver against advertisers' MarCom objectives. The following table shows the distribution of respondents' ratings for each MarCom channel.

Confidence ratings by MarCom channels										
	1 =not at all confident	2	3	4	5	6	7	8	9	10 = extremely confident
<b>TV</b> (N=69)	3	0	0	0	3	3	20	35	20	16
<b>Radio</b> (N=68)	0	4	4	12	9	12	25	21	10	3
<b>Magazines</b> (N=63)	0	6	5	11	19	17	21	17	2	2
<b>Newspapers</b> (N=65)	0	3	11	9	18	15	17	18	6	2
<b>Out-of-Home</b> (N=68)	1	1	4	3	12	18	35	21	3	1
<b>Direct Marketing</b> (N=67)	1	4	0	3	7	18	24	22	10	9
<b>PR</b> (N=66)	2	5	3	5	11	12	29	26	2	8
<b>Sponsorship</b> (N=69)	0	3	4	7	16	23	23	17	3	3
<b>Internet Advertising (display/video)</b> (N=72)	0	0	1	4	6	17	25	32	11	4
<b>Social Media</b> (N=71)	1	6	4	6	7	11	28	20	10	7
<b>Search</b> (N=71)	1	1	4	4	1	7	25	27	20	8
<b>Mobile</b> (N=65)	6	0	3	9	9	9	20	31	6	6

Of the 12 identified MarCom channels, TV followed by search, internet and direct marketing are rated highest with average confidence scores of 8.0, 7.4, 7.2 and 7.0, respectively. 8 of the 12 channels do not achieve an average confidence level higher than 7.0. Magazines are ranked lowest, preceded by sponsorship.

The number of respondents who rate TV in the top 3 box scores is significantly higher than the next highest number of respondents rating search in the top 3 confidence box scores.

# of respondents by top box scores for confidence ratings						
	Top 2 Box Scores	Ranking	Top 3 Box Scores	Ranking	Average Rating	Average Ranking
TV	<b>36%</b>	<b>1</b>	<b>71%</b>	<b>1</b>	<b>8.0</b>	<b>1</b>
Radio	13%	6	34%	8	6.5	8
Magazines	3%	12	21%	12	5.9	12
Newspapers	8%	9	26%	9	6.0	11
Out-of-Home	4%	11	25%	10	6.5	8
Direct Marketing	19%	3	41%	5	7.0	4
PR	9%	8	36%	7	6.6	5
Sponsorship	6%	10	23%	11	6.2	10
Internet Advertising (display/video)	15%	5	47%	3	7.2	3
Social Media	17%	4	37%	6	6.6	5
Search	<b>28%</b>	<b>2</b>	<b>55%</b>	<b>2</b>	<b>7.4</b>	<b>2</b>
Mobile	12%	7	43%	4	6.6	5

# APPENDICES



## Verbatim Responses

What are the main reasons for your change in MarCom expenditure patterns?

New tv campaign	Shift away from sponsorship marketing (not seeing returns), reduction in media that have not demonstrated a return.
Shift from print to online/exchange based on proven brand strategy html mobile site from app	Shifting focus to digital. Overall budgets are reduced, as organization is focusing on profitability for 2013.
Focus on acquisition via social channels	Strategy shift for f13
Plus de place aux réseaux sociaux	Move to search and ooh for recency
Growth in digital/mobile	Shift to digital/social with rise in new vehicles
Accélération de la culture digitale au sein de l'entreprise et investissements dans de nouveaux outils de crm	Media fragmentation and competitive environment
New entertainment venue coming online next fiscal	Shift to digital channels
Addressing changes in consumer media consumption habits	Less tv, switch to mobile and digital messaging to reach our younger target audience
Greater shift to digital media; declining sales affecting ad budgets	Need to divert money into advertising to enhance awareness of sponsorships
To take advantage of online and social	Moins de web traditionnel pour aller plus sur les réseaux sociaux qui connaissent une meilleure pénétration chez le groupe cible. Augmentation des panneaux extérieurs qui ont générés une bonne augmentation de trafic sur les catégories touchées cette année
Consumer media consumption habits continue to shift and guide where we can be most efficient and effective, and digital tracking measures continue to evolve.	Required program support as well as more vehicles at our disposal
Digital, social, search - all increasing due to changes in how consumers spend their time	Allocation being more aligned to a north american strategy.
Augmentation des dépenses média pour s'aligner sur la concurrence	Impossible pour moi d'évaluer la portion commandite. Les dépenses publicitaires diminuent d'année en année.
Une coupure énorme de budget en 2012 a forcé une approche totalement différente des années précédentes. Un retour à la normale ou presque est anticipé pour 2013	Tv still an important kpi for market share growth (shift from magazine) 2. Evolution of social media > increase in on-line (please note that internet includes display/video/social//mobile) most of the shift in this area is going towards social+mobile)
Plus dans le digital, en particulier les moteurs de recherche et vidéo online. Devons avoir une meilleure présence pour influencer le ZMOT et aussi le digital permet de couvrir plus grand géographiquement.	Mieux répondre aux habitudes médias de nos consommateurs
Pour aller rejoindre nos consommateurs de plus en plus mobile et intégrer des stratégies encore plus 360	Ramping up social media when marketing budgets falling. Less money for traditional advertising. (Category) highly influenced by peers using social media, so appropriate medium and cost effective. Still best when integrated with traditional mix of media.
Retailer is using digital more and we must be there	Suivre les tendances web et médias sociaux. Moins de promotions.

Research indicators	Incrementally invest to support new/growth businesses.
Testing and measuring results in communications best against our targets	Better database technology means we have better direct marketing opportunities. Print providing lower returns, social is a low percentage but also low cost
Getting better results using search, social, and online compared to traditional	Évolution des stratégies et du nombre de marques soutenues.
Shift towards digital and social media	La situation politique nous invite à revoir nos stratégies pour faire des placements plus responsables.
Plus de concentration et emphase tv pour bâtir l'image de marque	Search has been more effective than other digital. Magazines have been difficult to track effectiveness.
Need for greater measurability	We are focusing much more on tactical, regional efforts over awareness. The more targeted the better - online allows us to not only do this but also provides better tracking.
Improved e-delivery of services allow for more resources for online, mobile and social media	We want to focus more on the customer through social media.
In oct 2011 we launched a new brand and creative platform, which required significant marcom expenditure.	



## Questionnaire

### Marketing Communications Expenditure Survey

Thank you for participating in this 2012 Marketing Communications Expenditure survey.

Please note that all information will be treated with complete confidentiality and the final report will be presented in aggregate. No information will be attributable to any respondent. The summary report will be available to all respondents and ACA members. If you have any questions please contact Susan Charles at 416 964-1538 or [scharles@ACAweb.ca](mailto:scharles@ACAweb.ca).

**Q1.** Please provide your name and e-mail address so that we may forward the final report to your attention. Please note that your participation will be held in confidence.

Name: \_\_\_\_\_

E-mail address: \_\_\_\_\_@\_\_\_\_\_

**Q2.** Please send me the final report in:

- English
- French

**Q3.** Please indicate which category best describes your business.

- Packaged Goods (food & household products, health & beauty, beverages, clothing, etc.)
- Consumer Durables (household furnishings & appliances, electronic products, automobiles, etc.)
- Services (financial & insurance, communications, travel, utilities, etc.)
- Retail (restaurants, department stores, gas stations, specialty stores, etc.)
- Other

**Q4.** What is your current fiscal year total MarCom expenditure?

\$\_\_\_\_\_million

**Q5.** Your current MarCom budget represents what percentage of your company's sales?

\_\_\_\_\_ % of sales

**Q6. a)** Please indicate any change in your total MarCom expenditure levels for current year versus previous year:

- Increase
- Stay about the same
- Decrease

**b)** Please indicate % change.

\_\_\_\_\_ %

**c)** Please indicate any change in your total MarCom expenditure levels for next year versus current year:

- Increase
- Stay about the same
- Decrease

**d)** Please indicate change.

\_\_\_\_\_ %

**Q7.** Please indicate your percent allocation of MarCom budget by MarCom channel, by fiscal year.

MarCom Channel	Previous %	Current %	Next %
TV			
Radio			
Magazines			
Newspapers			
Out-of-Home			
Direct Marketing			
PR			
Sponsorship			
Internet Advertising (display/video)			
Social Media			
Search			
Mobile			
Other			
	100 %	100 %	100 %

**Q8.** Please provide the reasons for any change in your MarCom expenditure patterns.

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**Q9.** Please indicate your company's use of the following social media platforms as a marketing tool. (Check all that apply)

Social Media Channel	Previous Fiscal Year	Current Fiscal Year	Next Fiscal Year
Facebook	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Google +	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LinkedIn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Photo Sharing (Instagram, Tumblr, Imgur, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pinterest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Twitter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
YouTube	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Q10.** On a 10 point scale, please indicate your confidence in each MarCom channel to deliver against your MarCom objectives.

*Scale: 1 = not at all confident 10 = extremely confident*

<b>MarCom Channel</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>
TV										
Radio										
Magazines										
Newspapers										
Out-of-Home										
Direct Marketing										
PR										
Sponsorship										
Internet Advertising (display/video)										
Social Media										
Search										
Mobile										

ACA would like to thank you for completing this questionnaire. If you have any questions please contact Susan Charles at 416 964-1538 or [scharles@acaweb.ca](mailto:scharles@acaweb.ca).