



MARKETER'S PULSE

EXECUTIVE SUMMARY

With digital impacting every aspect of the industry, the ACA sought to find out how Canadian marketers are navigating this shifting landscape. ACA adapted a global study of CMOs, which identified challenges and opportunities in digital marketing, to gauge where Canada stands in relation to the global sample and to identify priorities for Canadian marketers. The following summarizes these findings.

In general, the Canadian marketplace lags global markets in the adoption of digital marketing initiatives, although it is our observation that Canada is rapidly gaining ground.

- Reports of marketer concern over lack of media transparency and the current unprecedented level of media agency searches may explain why 26% of Canadian respondents are **much less** or **somewhat less confident** in their media agencies. Overall, Canadian marketers are less confident in their agencies than the global sample.
- Compared to their global counterparts, Canadian marketers appear less concerned about the negative impact that click fraud and viewability issues have on their digital marketing efforts. It should be noted that Canada is also not as advanced in the online ad market. eMarketer reports Canada's adoption of programmatic buying for digital online campaigns trails the U.S. by about 12 months.
- Coincident with this lag, Canadian marketers have not engaged with outsourcing marketing performance functions to the same degree as the global sample. However, the traits they are looking for in external partners is similar to the global perspective.
- When asked to rank the significance of CMO challenges, Canadian marketers were consistent with the global perspective, ranking **overcoming financial constraints and demonstrating ROI** and **analyzing and exploiting consumer data** as most important.

ACA is pleased to provide you with the 10th report from the ACA Marketer's Pulse panel.

This report contains results of what Canadian marketers are thinking, planning and experiencing at their workplaces, and with their suppliers and consumers.

Thank you to the panelists who agreed to provide their perspectives and insights. The ACA will continue to monitor the pulse of the changing dynamics in the Canadian marketing environment, and to provide you with current results and trend lines as they develop.

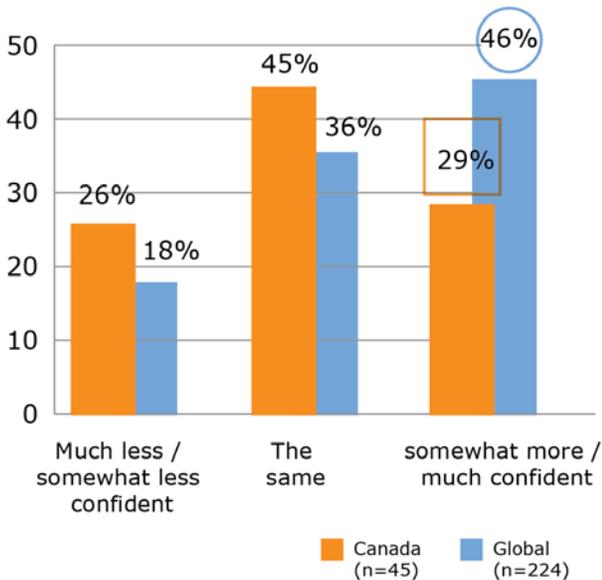
To learn more about this report and how you can realize additional value from your ACA membership, contact Ron Lund, President & CEO at (416) 964-0700 or rlund@ACAweb.ca.





1. Confidence In Media Agency

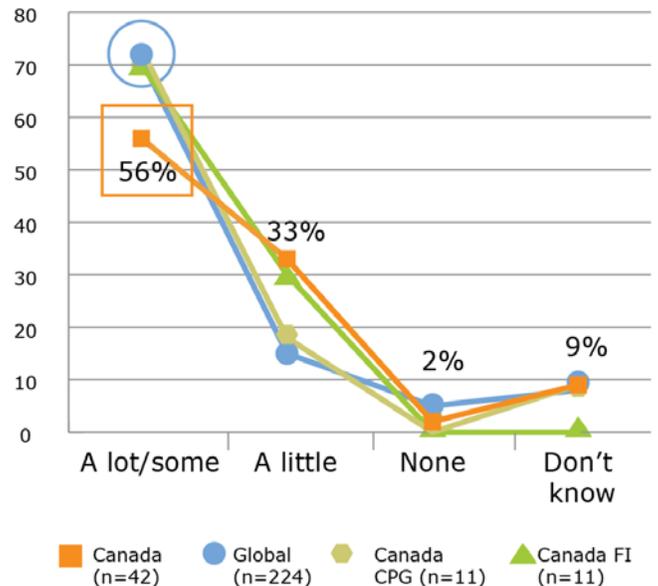
Compared to the global sample, Canadian marketers have more reservations in their confidence levels for their media agencies. Nearly half (45%) of Canadian marketers are as confident about their media agency’s ability to deliver optimal work this year as they were last year. The balance of respondents is equally divided between **less confident** and **more confident**.



Question: Compared to a year ago, how confident are you that your media agency is delivering you the optimal effectiveness and efficiency?

2. Concern About Click Fraud And Viewability

Just over half (56%) of the total Canadian marketer sample indicate they are **some** or **a lot concerned** about the negative impact click fraud and viewability issues have on their digital marketing efforts. It’s interesting to note that this level of concern is somewhat lower than the global sample. However, when segmented by industry sector, CPG and Financial Institution (FI) respondents are much more concerned compared to the total Canadian sample and on par with the global respondents.



Question: To what extent do you believe click fraud and viewability issues are undermining the effectiveness of your digital marketing activity?

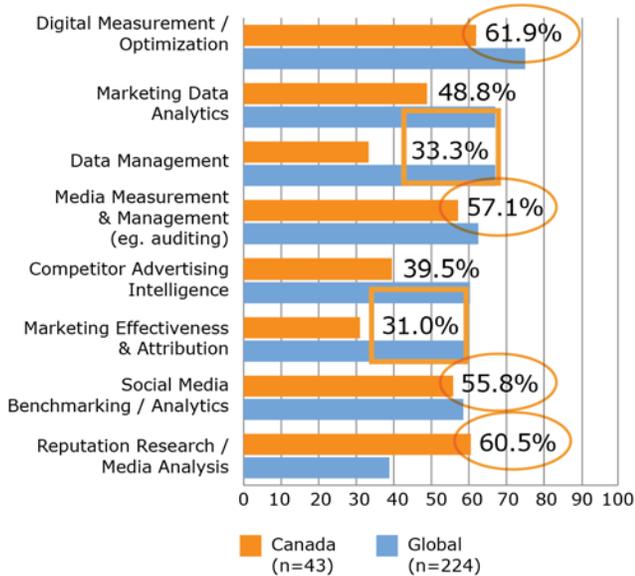
3. Use Of External Marketing Performance Partners

The majority of Canadian marketers outsource marketing performance services such as **digital measurement, reputation research, media measurement** and **social media analytics**. However, they are less likely to hire external agency partners for **attribution modeling** and **data management**.

This suggests that marketers have a tendency to manage the more proprietary customer data/information in-house.

Compared to the global sample, Canadian marketers are less likely to outsource marketing performance functions, with the exception of **reputation research**.

% using external performance partners

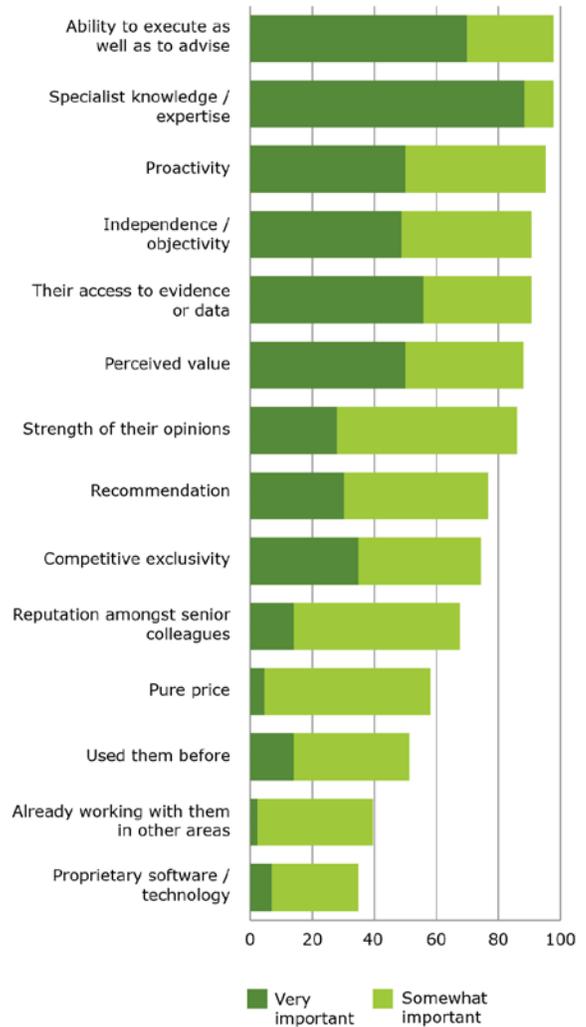


Question: Do you currently employ external marketing performance partners to help you in the following areas? (% answering YES)

4. Priority Of requirements For External Marketing Performance Partners

The majority of listed requirements are important to marketers when searching for external marketing performance partners. The Canadian results mirror the global results in terms of rank order of importance.

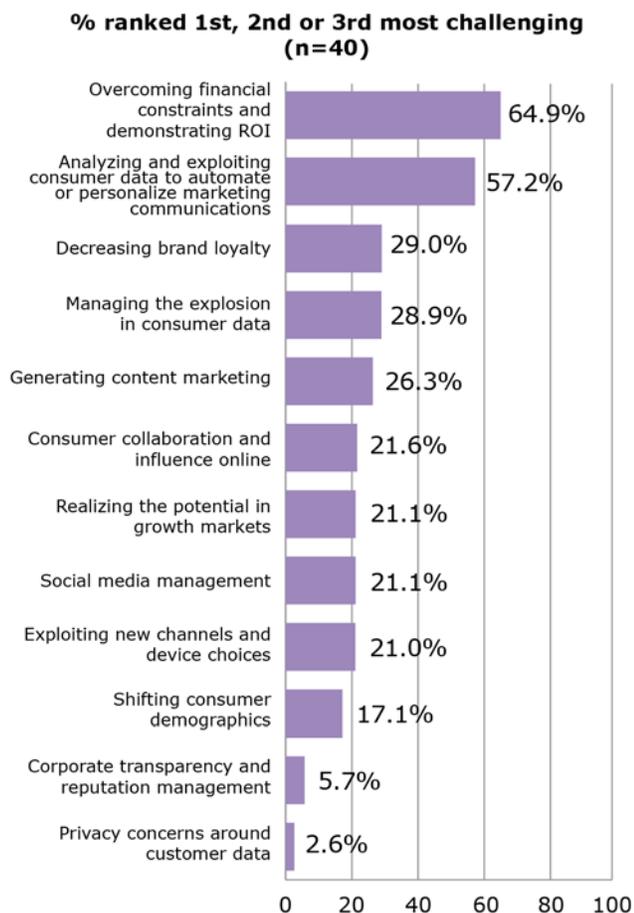
Very / somewhat important scores (n=43)



Question: How important are the following (requirements) when recruiting external marketing performance partners? (Very Important, Somewhat Important, Not Very Important, Not Important)

5. CMO Challenges

Canadian CMOs consider **overcoming financial constraints and demonstrating ROI** to be most challenging, with nearly two-thirds of respondents ranking it 1st, 2nd or 3rd. **Analyzing and Exploiting Consumer Data To Automate And Personalize MarCom** ranked as second-most challenging. This is consistent with industry headlines highlighting both MarCom ROI and Big Data as major CMO challenges.



Question: Recent research among marketing executives has identified the following challenges. Please rank from the most challenging to the least challenging.

ABOUT ACA Marketer's Pulse



ACA seeks input from senior Canadian marketers to provide valuable insights into marketing dynamics. The ACA Marketer's Pulse panel shares what they are thinking, planning and experiencing at their workplaces, and with their suppliers and consumers.

- **Panel composition**
 - The panel consists of senior marketers in Canada, representing a cross section of industry sectors and marketing/MarCom spending levels.
 - Almost 90 marketers are currently registered.
- **September 2015 survey respondents**
 - 45 (75% English, 25% French)
- **Field dates**
 - August 26 – September 22, 2015
- **Methodology**
 - Survey questions adapted by ACA
 - Survey Monkey link emailed to panelists
 - All results are reported in aggregate to protect confidentiality
 - Report written by ACA

ABOUT ACA



The Association of Canadian Advertisers (ACA) is the marketer's only independent voice in Canada. We maximize marketing communication and brand ROI by advocating for marketers' interests, driving transparency and accountability, providing insight and best practices, and facilitating professional development and networking. For more information, visit ACAweb.ca.

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