



DRIVING MARKETING SUCCESS

MARKETER'S PULSE

EXECUTIVE SUMMARY

- Marketers moderated their perception of business expectations and consumer confidence, anticipating more stable conditions and perceptions versus the modest optimism reported in May.
- Despite this, there is a significant increase in the number of respondents who reported 'stable/increasing' MarCom budgets, from 66% in May to 80% in September.
- Conventional budgeting based on 'historical MarCom spend levels adjusted for current year objectives' dominates.
- The vast majority of marketers indicate the use of at least one social media platform.
- Not surprisingly, the dominant choices for social media platforms mirror the dominant channels used by Canadian consumers.
- Marketers indicate an average of 3+ groups (various internal departments and/or external agencies) are involved in the management of social media.

ACA is pleased to provide you with the third 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, partners and consumers.

Thank you to the senior Canadian marketers 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.

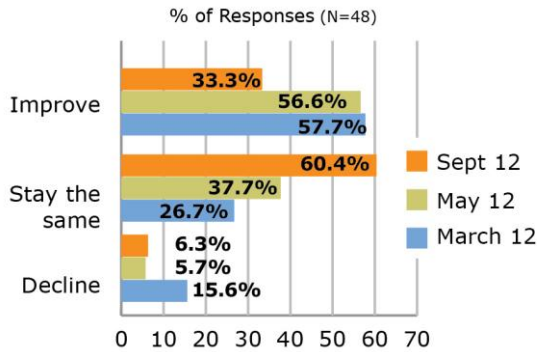
To learn more about this report and how you can realize value from your ACA membership, contact Susan Charles, Vice President, Member Services at (416) 964-1538 or scharles@ACAweb.ca.





1. Business (sales/revenue) expectations

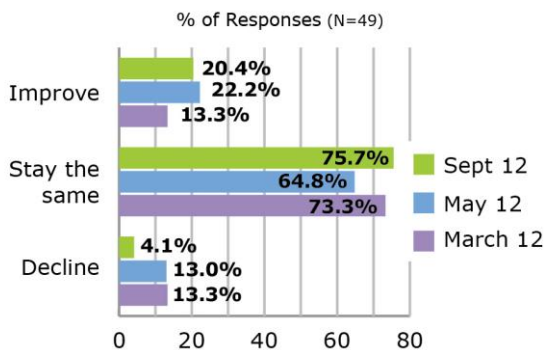
There has been a marked shift from a more positive to a more neutral outlook. 60% of respondents now indicate business expectations to 'stay the same' over the next 6 months, while respondents anticipating conditions to 'improve' eroded to 33%.



Question: Over the next 6 months, I expect my business (sales/revenue) will: Improve, Stay about the same, Decline.

2. Perspectives on consumer confidence

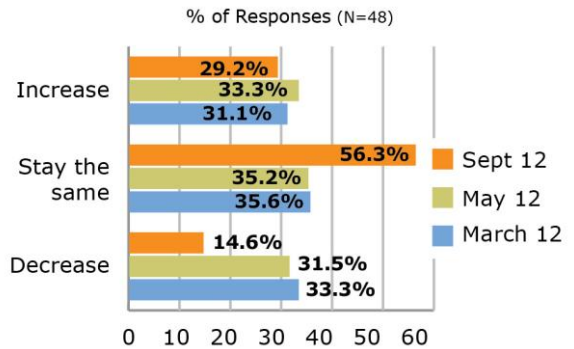
Perception of consumer confidence recorded a modest lift with more than 75% of respondents reporting their expectations for their consumers' confidence levels to 'stay the same.'



Question: Over the next 6 months I expect my consumer's confidence level will Improve, Stay the same or Decline.

3. Changes in MarCom budgets

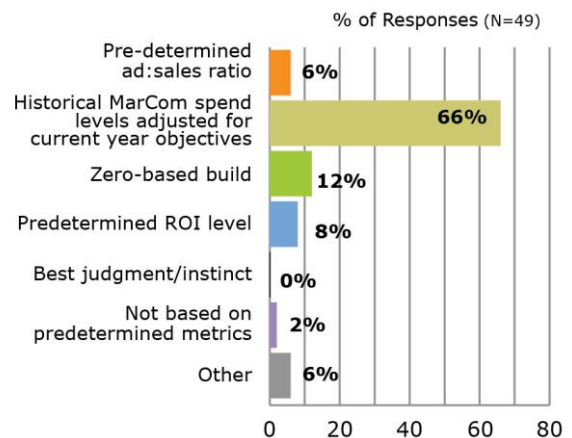
Budget expectations are more optimistic, with over half (56.3%) of respondents indicating their MarCom budgets are expected to 'stay the same.' This reflects a noticeable shift from 'decrease' (-16.9 points) to 'stay about the same' (+21.2 points).



Question: Going forward, I expect my marketing communications budget will: Increase, Stay about the same, Decrease.

4. How organizations establish MarCom budgets

Despite the heightened focus and importance being placed on marketing and MarCom accountability, almost two-thirds of respondents use an 'historical' approach for MarCom budgeting.



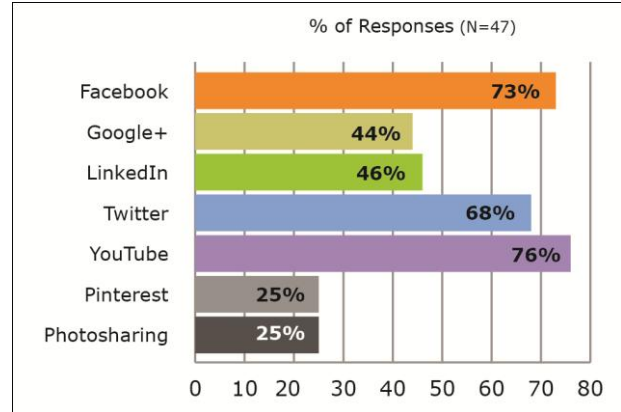
Question: Which best describes how your organization establishes its current MarCom budget level?





5. Social media platforms used by Canadian marketers

The vast majority (47 out of 51 respondents) indicate they use at least one social media platform as a MarCom channel. The most popular social media platforms are YouTube (76%), Facebook (73%) and Twitter (68%). This mirrors the use by Canadians of Facebook and YouTube as dominant platforms. (Source: Crosby Consulting Group Report, Jan 2012, millions of Canadian users active in past month)



Question: Please indicate which social media platforms your organization currently uses as a MarCom channel.

Key findings around the purpose for use of selected social media channels reveal:

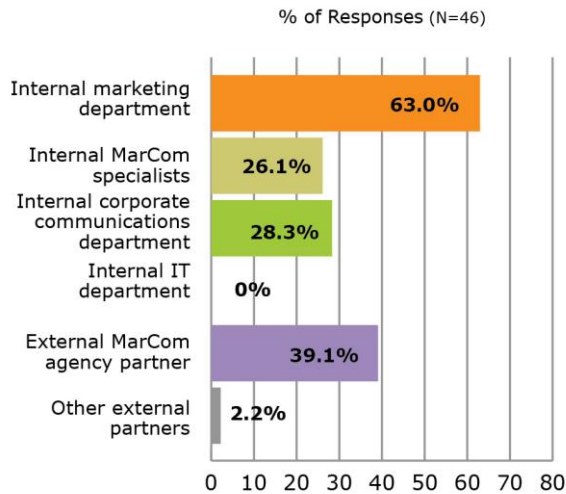
- Among the 73% of respondents who use Facebook, over 80% use it to deploy a full range of communication strategies
- Among the 76% of respondents who use YouTube, over 80% use it to deploy a narrower range of communication strategies, specifically: 'create increased brand awareness' and 'enhance brand perceptions/sentiments'

Strategy	Facebook	Google+	LinkedIn	Twitter	YouTube	Pinterest	Photosharing
	n = 41	n = 30	n = 31	n = 29	n = 42	n = 23	n = 23
Create increased brand awareness	82.4%	32.4%	17.6%	47.1%	85.3%	14.7%	17.6%
Enhance brand perceptions/sentiments	87.5%	15.0%	17.5%	62.5%	80.0%	22.5%	12.5%
Generate response to brand message	97.5%	15.0%	5.0%	65.0%	47.5%	12.5%	10.0%
Impact business results	84.6%	19.2%	11.5%	34.6%	42.3%	3.8%	3.8%
Use for other purposes	58.3%	8.3%	50.0%	16.7%	33.3%	0%	16.7%



6. Who manages the social media program(s) for your organization

Respondents indicate that social media programs are predominantly handled internally by the marketing department (63%). Almost 40% of respondents indicate they also engage external MarCom agency partners to manage their social media programs. On average, 3.45 departments or resource groups contribute to the management of the respondents' social media programs.



Question: Who manages the social media program(s) for your organization? (Select all that apply)

ACA seeks input from senior Canadian marketers to provide valuable insights into Canadian marketing dynamics. The ACA Marketers' Pulse panel, comprised of senior Canadian marketers, shares what they are thinking, planning and experiencing at their workplaces, and with their suppliers, partners and consumers. The panel is asked questions about their current business conditions, perceptions and strategic priorities. The ACA Marketer's Pulse Report provides the results of this and future surveys.

- **Panel composition**
 - The panel consists of senior marketers in Canada, representing a cross section of industry sectors and marketing/MarCom spending levels
 - More than 80 senior Canadian marketers registered to date
- September 2012 survey respondents
 - 53 (85% English, 15% French)
- **Field dates**
 - September 6 – 28, 2012
- **Methodology**
 - Survey questions developed by ACA with input from ACA members
 - Survey Monkey link e-mailed to panelists
 - All results are reported in aggregate to protect confidentiality
 - Report written by ACA



The Association of Canadian Advertisers (ACA) is a national, not-for-profit association exclusively dedicated to serving the interests of companies that market and advertise their products and services in Canada. For more than 95 years, the ACA has been the premier Canadian marketing association, with an unparalleled track record in driving marketing success for our members.

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