



DRIVING MARKETING SUCCESS

MARKETER'S PULSE

EXECUTIVE SUMMARY

- The Panel has reported on three key indicators over the past four surveys. In January 2013, the levels of optimism for business expectations and consumer confidence bounced back following a marginal dip reported in the September 2012 survey.
- Mobile has reached a level of ubiquity, and is being considered (or employed) in over 90% of MarCom programs. Interestingly, while social media (presumably including mobile) struggles to demonstrate a ROI, gaining senior management support – or budget approvals – does not appear to be an issue.
- We are in early days of managing 'Big Data.' Despite generating a high level of industry buzz, Big Data has yet to emerge as a top priority for marketers. Neither do marketers have a high level of confidence in their organizations' ability to manage it.
- The ability to address the MarCom ROI issue continues to top the CMO's list of challenges.

ACA is pleased to provide you with the fourth 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 provided 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.



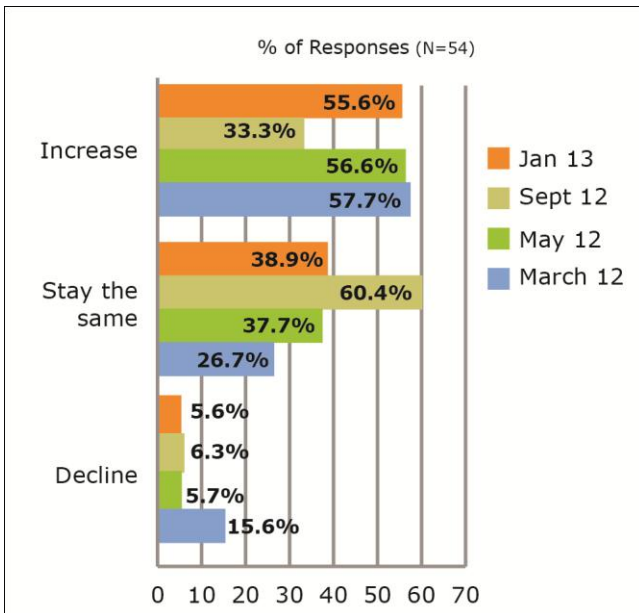


1. Business (sales/revenue) expectations

The Marketer's Pulse panel of senior marketers has reported on three key indicators in each of the 4 surveys undertaken since February 2012. The results provide a trend line for business expectations, perspectives on their consumer confidence levels and anticipated changes in MarCom budgets.

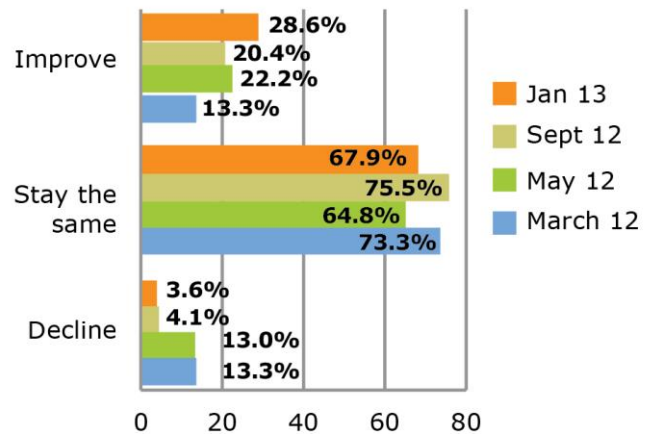
In January 2013, there is a return to the higher levels of optimism for 'business to increase' and 'consumer confidence levels to improve'.

Question: Over the next 6 months, I expect my business



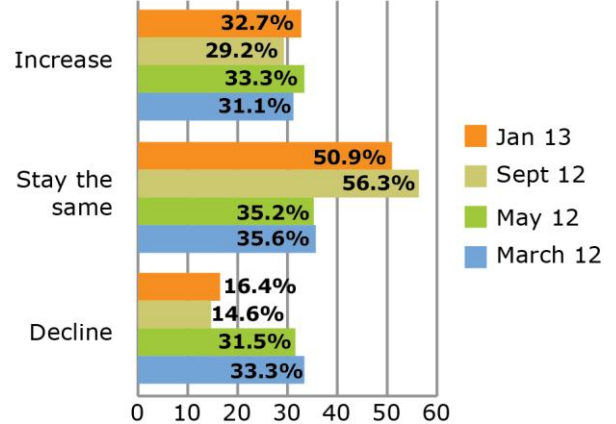
(sales/revenue) will: Increase, Stay about the same, Decline.

% of Responses (N=56)



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

% of Responses (N=55)



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

2. Rank Order of CMO challenges

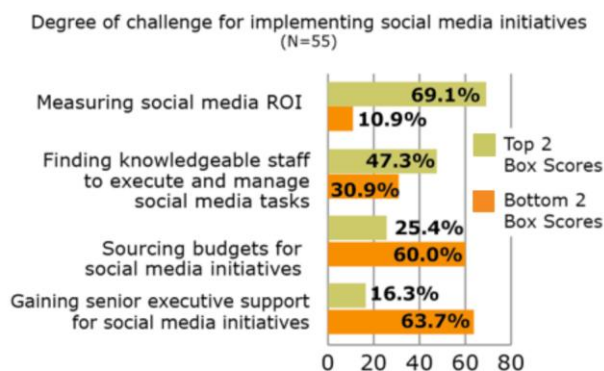
ROI continues to top the list of the CMO challenges. It is interesting to note that marketers are polarized on “planning within a volatile market...” Respondents bookended the spectrum by ranking its importance either at the high or low end. ‘Understanding the changes in the consumer decision journey’ is also ranked as a high priority.

Question: The following CMO challenges have been identified. Please rank from top down the following statements in order of importance to you and your organization. (1 = most important; 2 = second most important, etc. Select a position/rank number for each statement.)

CMO Challenge (N=55)	1 = most important	2 = next most important	3	4	5
Demand for ROI is high but lack necessary tools to figure it out	30.9%	12.7%	25.5%	21.8%	9.1%
Planning within the volatile market and economic conditions	25.5%	21.8%	9.1%	10.9%	32.7%
Understanding the changes in the consumer decision journey due to their increased access to information and transactional touch points	21.8%	25.5%	18.2%	27.3%	7.3%
Managing the increasing organization and partner complexity	14.5%	27.3%	25.5%	16.4%	16.4%
Big Data opportunities but lack resources for analysis	7.3%	12.7%	21.8%	23.6%	34.5%

3. Challenges for marketers implementing social media initiatives

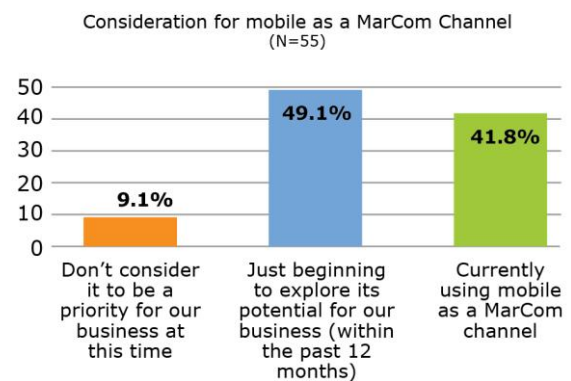
The major challenge for marketers implementing social media initiatives is measurement. Over two-thirds of respondents rated this activity the highest degree of challenge, based on top 2 box scores. Interestingly, in spite of this there is only a low degree of difficulty in gaining senior executive support and sourcing budgets for these initiatives.



Question: On a scale of 1 - 5 (1 = extremely low, 5 = extremely high) rate the degree of challenge your organization faces when implementing social media initiatives.

4. Use of mobile as a MarCom channel

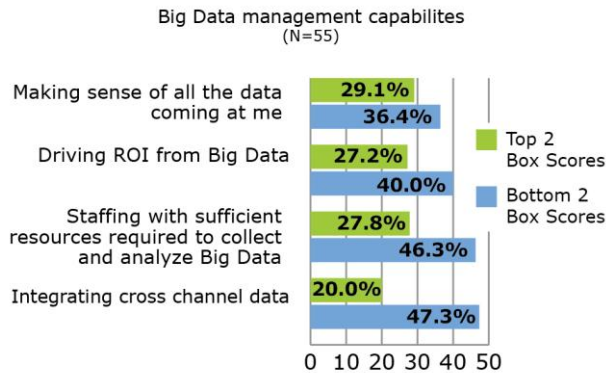
The use of mobile as a MarCom channel is widespread. Almost 50% are beginning to explore its potential, and more than 40% are using it now.



Question: Does your organization currently use mobile as a MarCom channel to enhance your MarCom programs and the customer experience with your brand?

5. 'Big Data' capabilities

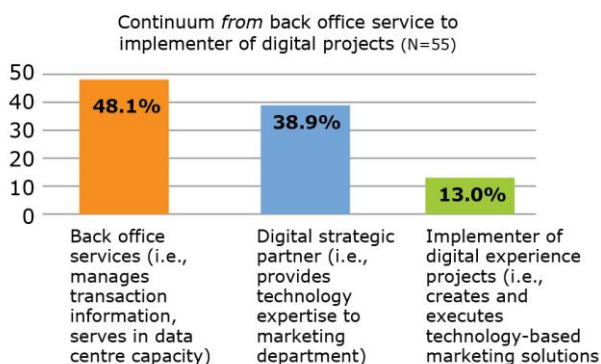
Overall, there is not a high level of confidence in respondent organizations' ability to manage Big Data as applied to marketing, with approximately 40% scoring in the bottom 2 boxes across all dimensions.



Question: *Big Data, applied to marketing, is transforming how marketers attempt to reach consumers. On a scale of 1 - 5 (1 = extremely low, 5 = extremely high) rate your organization's data management capabilities.*

6. IT Department's relationship with marketing

Very few organizations have begun integrating their IT and marketing functions. Only 13% of respondents indicated IT as the resource which creates and executes technology-based marketing solutions.



Question: *Organizations need to/are transforming IT from a back office commodity to a strategic marketing advantage. How far along this continuum is your organization? (Select the option that best describes your organization's IT relationship with the marketing department.)*

ABOUT ACA MARKETER'S PULSE

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 90 senior Canadian marketers are registered to date
- **January 2013 survey respondents**
 - 56 (84% English, 16% French)
- **Field dates**
 - January 7 - 31, 2013
- **Methodology**
 - Survey questions developed by ACA with input from ACA members
 - 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 premier Canadian marketing association. As Canada's only association exclusively representing client marketers, the ACA is dedicated to helping its members maximize the value of their investments in all forms of marketing communications.

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