



Overview



The Canadian manufacturing market is experiencing a transformation from traditional to digital media – requiring CBP/ABM members to integrate digital into all aspects of their offerings to remain highly relevant and valuable to B2B marketers and decision makers

Agenda

- **Study objectives, methodology, approach, definitions**
- **Executive summary**
- **Analysis**
- **Recommendations for CBP/ABM media members**
- **Demographics**

Study objectives

ABM engaged Forrester Consulting to complete an independent analysis of the trends and impact of B2B media on both US end-users/decision makers and marketers in light of digital media growth and B2B media's potential for supporting the B2B sales process.

The analysis included a sample of manufacturing and process industry respondents from the Canadian market.

The analysis also examined:

- Which digital tactics business decision makers use – and why – and whether B2B marketers are keeping pace with these trends.
- Whether decision makers are more engaged or become more involved with industry-specific media like magazines, events, and Web sites than general business media.
- Whether decision makers find industry-specific media valuable for informing their business purchase decisions, helping them do their jobs better, and growing professionally.
- How industry-specific media influences business decision-making when used alone or together.
- How industry-specific media supports the B2B sales process at a time when it is more difficult and expensive to reach decision makers with sales interactions.
- What the future holds for digital media specifically and B2B media in general.

Study methodology

- Forrester developed questions for an online survey jointly with ABM and CBP to address the current and future state of B2B: media use, attitudes about media, media spending, and media use in purchase decision making.
- Fielded screener questions to a predetermined portion of the Global Market Insight's (GMI) panel to identify qualified respondents in the US and in the Canadian manufacturing industry segment.
 - GMI recruits panelists by email and uses a point system to encourage participation. GMI manages over a million active business panelists in NA.
- Fielded survey in English and French to qualified GMI panelists; 30 Canadian B2B Decision Makers and 30 B2B marketers completed the surveys within the Manufacturing and Processing industry.
- Developed a comparable survey and fielded it to a separate sample to assess the impact of the digital transformation on the US market. A total of 878 B2B Decision Makers and 816 B2B Marketers completed the survey. In the US manufacturing segment, 89 decision makers and 85 marketers completed the survey.

Interpreting the data

- Given the size of the Canadian sample, when comparing to the US manufacturing sample or the total US sample, the Canadian data and its comparison to the US data should be viewed as directional.

Approach taken to analyze the findings

- Assess which media business decision makers use in their jobs, use to substantiate their purchase decision making, and why.
- Determine if marketers adequately use these same tactics to meet business decision makers-expressed needs and preferences.
- Highlight gaps and opportunities where B2B marketers can:
 - Use specific media platforms to reach decision makers or help support their product/service decision making.
 - Integrate media choices to increase involvement or engagement of decision makers.
 - Enhance the B2B sales process with specific media choices.
- Determine whether marketers' future plans support the digital media shift and are consistent with the value B2B decision makers receive from B2B media.

Definitions

When the respondents completed the survey, they used the following definitions:

- Industry-specific media: publications and Web sites that focus on news and trends affecting a particular industry or profession (*Food in Canada, PrintAction, Design Engineering, Plant Engineering & Maintenance*) Survey questions used the term “industry/profession-specific”
- General business media: publications and Web sites that cover broad business issues, trends, and topics (*Canadian Business, Globe & Mail Report on Business*)
- Specialized business Web sites: Web sites targeting specific categories of business professionals like IT, design engineers, or medical professionals (*IndustryLink.com, CanBiotech.com, Electronics.ca*)
- Business decision maker: Middle managers and upper-level executives significantly involved in approving budgets and evaluating or purchasing products/services.

Agenda

- Study objectives, methodology, approach, definitions
- **Executive summary**
- Analysis
- Recommendations for Canadian ABM media members
- Demographics

Executive summary

- Canadian manufacturing business decision makers use of digital media is growing but not as rapidly as in the US.
 - They prefer to use email/newsletters and Web portals more than online events or industry-specific Web sites.
 - However Canadian manufacturing B2B decision makers plan to use more digital media in 2009 – so digital media use will continue to grow over the next two years.
- Even with the trend toward digital media use increasing, traditional industry-specific media remain highly relevant and engaging to Canadian manufacturing business decision makers.
- Canadian manufacturing marketers are adopting individual-use digital media like podcasts and video/rich media while avoiding community-oriented digital media like Web events and forums.
- While each of the key industry-specific media demonstrates unique strengths, they are *most effective when used together* in an integrated manner.
- Industry-specific media *extend the reach and effectiveness* of the Canadian manufacturing marketer's sales organization.
- Canadian manufacturing marketers plan to *underutilize* industry-specific media in their future spending compared to Canadian manufacturing business decision makers' expected use of these media.

Agenda

- Study objectives, methodology, approach, definitions
- Executive summary
- **Analysis**
- Recommendations for Canadian ABM media members
- Demographics

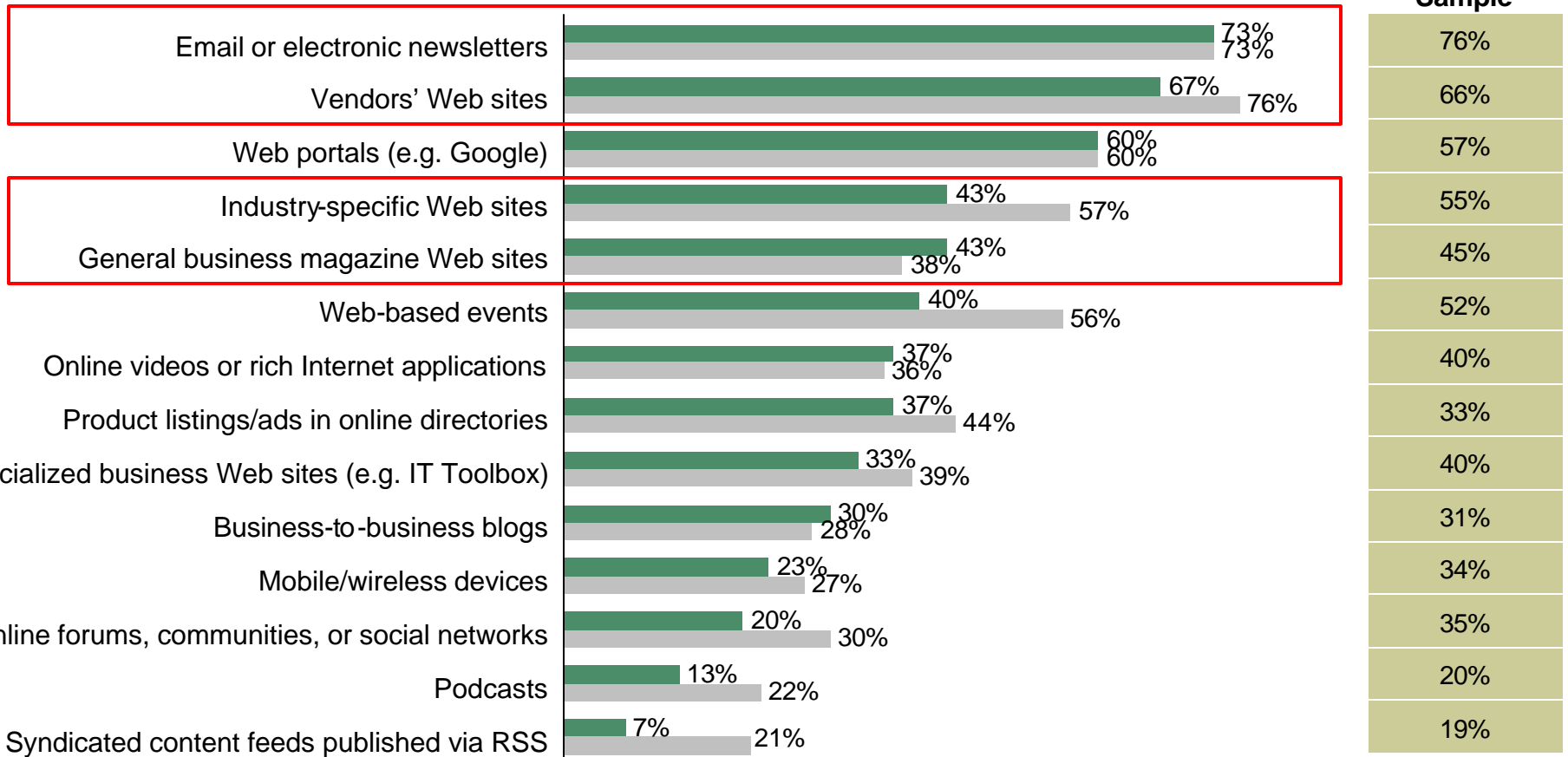
How do Canadian manufacturing decision makers use – and value– digital media?

Are Canadian manufacturing marketers taking full advantage of these trends in Canadian manufacturing business decision makers' digital media use?

Canadian manufacturing business decision makers use email and vendor Web sites more than business media – their use of industry-specific and general business magazine Web sites is similar

“Which *digital* B2B media do you use to do your job?”

■ Canadian Manufacturing B2B Decision Makers ■ US Manufacturing B2B Decision Makers



Base: 30 Canadian manufacturing decision makers; 89 US manufacturing decision makers; 878 US decision makers overall

S7A: Decision Makers survey: Which of the following types of digital B2B media do you read or interact with to do your job?”

On the job, Canadian manufacturing business decision makers rely more on Web portals and RSS feeds than their US counterparts

“Of the *digital* B2B media that you use on your job, which 3 do you rely on the most”

B2B Decision Makers	Canadian Manufacturing	US Manufacturing	US Total Sample	Can. Man.	US Man.	US Total Sample
Media	Percentage	Percentage	Percentage	Base	Base	Base
Email or electronic newsletters	82%	68%	70%	22	65	666
Industry-specific Web sites	62%	67%	70%	13	51	485
Vendors' Web sites	75%	74%	64%	20	68	582
Web-based events	25%	44%	45%	12	50	458
Specialized business Web sites (e.g. IndustryLink.com)	30%	37%	43%	10	35	354
General business magazine Web sites	39%	35%	39%	13	34	395
Business-to-business blogs	22%	60%	32%	9	25	273
Online forums, communities, or social networks	17%	30%	30%	6	27	304
Web portals (e.g. Google)	47%	28%	30%	18	53	500
Product listings/ads in online directories	36%	46%	29%	11	39	291
Mobile/wireless devices	0%	8%	24%	7	24	296
Online videos or rich Internet applications	18%	6%	24%	11	32	348
Podcasts	25%	10%	19%	4	20	174
Syndicated content feeds published via RSS	50%	11%	16%	2	19	166

Q1A Decision Makers survey: Of the following digital B2B media that you read or interact with on your job, which 3 do you rely on the most?

Canadian manufacturing business decision makers' use of industry-specific Web sites and emerging media to enhance their traditional media experience mirrors their US counterparts

Respondents who answered they were “likely or very likely” to :

B2B Decision Makers	Canadian Manufacturing	US Manufacturing	US Total Sample	Can. Man.	US Man.	US Total Sample
Statement	Percentage	Percentage	Percentage	Base	Base	Base
Visit the Web site of an industry/profession specific business magazine after I attended an event the magazine sponsored	68%	61%	61%	22	67	632
Visit the Web site of an industry/profession-specific business magazine that I read	65%	64%	64%	20	67	636
Visit the Web site of an industry/profession specific business magazine that sponsors an event that I plan to attend	53%	58%	64%	19	64	613
Participate in a Web event sponsored by a magazine that I read	48%	42%	41%	27	77	727
Participate in a Web event or listen to a podcast, instead of attending an in person event	40%	43%	43%	25	72	702
Read a blog that was mentioned in a magazine or written by an author of a magazine that I read	37%	35%	39%	27	74	741
Use social networks to keep in touch with peers that I met at an event	33%	23%	30%	27	75	740

Q15 Decision Makers survey: How likely are you to do the following activities?

Canadian manufacturing B2B marketers use rich media and podcasts more than US counterparts – but use Web-based events and online forums less

“Of *digital* marketing tactics used or sponsored in the past 12 months, which 3 did you use the most?”

B2B Marketers	Canadian Manufacturing	US Manufacturing	US Total Sample	Can. Man.	US Man.	US Total Sample
Media	Percentage	Percentage	Percentage	Base	Base	Base
Vendors' Web sites	91%	84%	87%	22	70	648
Web portals (e.g. Google)	93%	77%	71%	15	34	337
Email or electronic newsletters	60%	65%	66%	15	51	494
Web-based events	29%	51%	54%	14	35	357
Industry-specific Web sites	42%	48%	50%	12	31	316
Product listings/ads in online directories	56%	53%	47%	9	47	327
Specialized business Web sites (e.g. IT Toolbox)	43%	36%	40%	14	25	275
Online videos or rich Internet applications	50%	27%	38%	10	22	281
General business magazine Web sites	22%	27%	37%	9	22	241
Business-to-business blogs	33%	31%	35%	9	29	268
Podcasts	50%	0%	24%	4	7	141
Online forums, communities, or social networks	10%	39%	24%	10	18	201
Mobile/wireless devices	14%	31%	21%	7	16	159
Syndicated content feeds published via RSS	0%	13%	19%	4	8	143

Q2A: Marketers survey: Of the following digital B2B trade marketing tactics that your company used or sponsored in the past 12 months, which 3 did you use the most?”

Canadian manufacturing business decision makers emphasize convenience and ease when asked why they rely more on certain digital media

- Vendors' Web sites ➤ "It allows me to take my time and review their products and services without the pressure of a sales pitch. I can call when I want or email to have my questions answered."
- Web portals ➤ "They are a great resource/information gathering search tool and provide us the ability to seek out specific information related to our industry."
- Web-based events ➤ "Online events reach out to more people with less cost."
- Forums/
Social networks ➤ "I can use it at my convenience."
- Blogs ➤ "Good form of communication."
- RSS ➤ "Convenience."

Q1B Decision makers survey (open ended): "What would you say is the primary reason(s) why you rely on the following digital business-to-business media?"

Canadian manufacturing B2B marketers regard industry-specific Web sites more positively than their US counterparts

	Canadian Manufacturing	US Manufacturing	US Total Sample	Can. Man.	US Man.	US Total Sample
B2B Marketers who say . . .	Percentage	Percentage	Percentage	Base	Base	Base
Industry-specific Web sites are effective at reaching decision makers	83%	67%	68%	12	30	304
Industry-specific Web sites are effective at generating leads	91%	63%	62%	11	30	303
Industry-specific Web sites will be effective or very effective as sales and marketing tactics in 2009	71%	62%	61%	28	78	816

The gap between Canadian manufacturing B2B decision makers and marketer use of industry-specific Web sites is narrow when compared to the gap seen in the US populations.

	Canadian Manufacturing	US Manufacturing	US Total Sample	Can. Man.	US Man.	US Total Sample
	Percentage	Percentage	Percentage	Base	Base	Base
Business Decision Makers who use industry-specific Web sites on their job	43%	57%	55%	30	89	878
Marketers who used or sponsored industry-specific Web sites in the past 12 months	40%	37%	39%	30	89	816

Q4 Marketers survey: How effective are the following marketing tactics for reaching business decision-makers?

Q6 Marketers survey: How effective are the following marketing tactics for generating qualified leads?

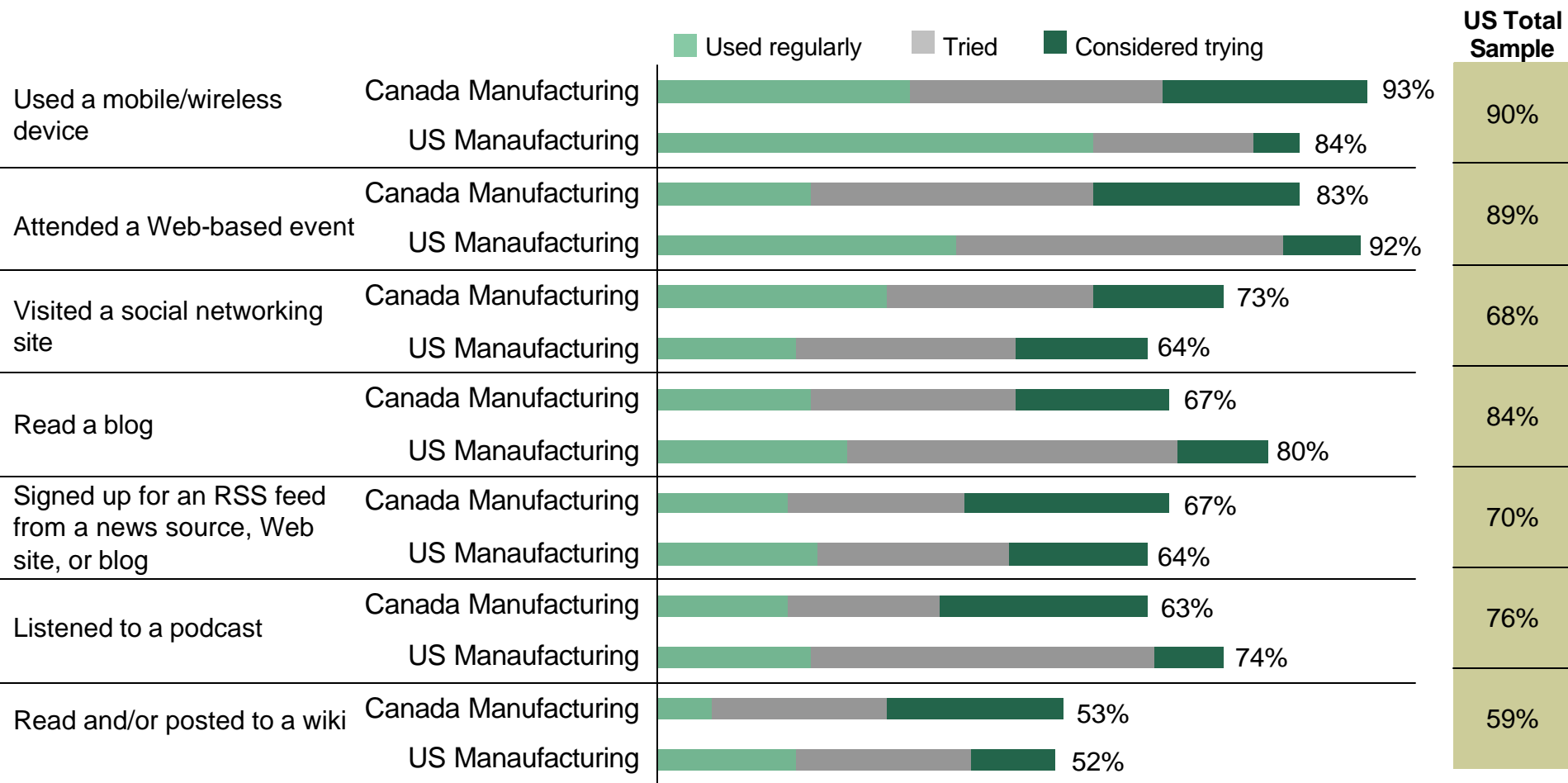
Q8 Marketers survey: "Compared with today, how effective do you think each of the following sales and marketing tactics will be in 2009?"

S7A Decision Makers survey: Which of the following types of digital B2B media do you read or interact with to do your job?

Q1B Marketers survey: Which of the following digital B2B/trade marketing tactics did your company use or sponsor in the past 12 months?

Canadian manufacturing B2B decision makers' experimentation with and use of emerging digital media follows a similar adoption pattern to US manufacturing and US total

“Which of the following activities relevant to your job or industry have you tried or considered trying?”



Base: 30 Canadian manufacturing decision makers; 89 US manufacturing decision makers; 878 US decision makers overall

Q16 Business decision makers survey: “During the past 12 months which of the following activities relevant to your job or industry have you tried or considered trying?”

Canadian manufacturing B2B decision makers are adopting emerging digital media at a greater rate than Canadian manufacturing marketers are using them – creating an opportunity for Canadian manufacturing business media providers

“Of the following digital media, which did you *rely on/use the most*?”

	Canadian Manufacturing	US Manufacturing	US Total Sample	Can. Man.	US Man.	US Total Sample
B2B Decision Makers who say . . .	Percentage	Percentage	Percentage	Base	Base	Base
Syndicated content feeds published via RSS	90%	11%	16%	10	19	166
Podcasts	82%	10%	19%	11	20	174
Business-to-business blogs	36%	60%	32%	11	25	273
Online forums, communities, or social networks	43%	30%	30%	7	27	304
Mobile/wireless devices	44%	8%	24%	9	24	296

	Canadian Manufacturing	US Manufacturing	US Total Sample	Can. Man.	US Man.	US Total Sample
B2B Marketers who say . . .	Percentage	Percentage	Percentage	Base	Base	Base
Syndicated content feeds published via RSS	0%	13%	19%	4	8	143
Podcasts	50%	0%	24%	4	7	141
Business-to-business blogs	33%	31%	35%	9	29	268
Online forums, communities, or social networks	10%	39%	24%	10	18	201
Mobile/wireless devices	14%	31%	21%	7	16	159

Q2A Marketers survey: Of the following **digital** B2B trade marketing tactics that used or sponsored in the past 12 months, which 3 did you use the most?”

Q1A Decision Makers survey: Of the following **digital** B2B media that you read or interact with on your job, which three did you rely on the most?”

However, Canadian manufacturing B2B marketers are beginning to recognize the value of emerging digital media

Web Events ➤ “New approach.” “Convenient.”

Blogs ➤ “People want to communicate with their peers within the industry and seem to give a lot of credit to blogs.”

Podcasts ➤ “Useful for getting our customers’ opinions and thoughts of how to go about changing our business to meet their needs.”

Forums/
Social
networks ➤ “They are low cost and address our target audiences directly.”

Q2B Marketers survey (open ended): “What would you say is the primary reason why you use the 3 digital business-to-business/ trade marketing tactics selected previously...?”

Canadian manufacturing marketers' positive view of digital media is reflected in their future plans that exceed their US counterparts

“Which emerging digital marketing tactics have you used in the past 12 months?
Which you likely to consider using in the next two years (through 2009)?”

Media	Canadian Manufacturing		US Manufacturing		US Total Sample	
	Currently Use	Will consider using	Currently Use	Will consider using	Currently Use	Will consider using
Advertising in industry-specific magazines with fulfillment on the Web	63%	60%	39%	47%	46%	49%
Advertising on a Web site for an event	53%	60%	49%	52%	51%	53%
Sponsoring a Web event or virtual trade show	47%	63%	25%	60%	36%	52%
Sponsoring an online discussion or community site	40%	60%	28%	45%	29%	47%
Producing online videos or rich Internet applications	40%	50%	26%	49%	39%	52%
Mobile/wireless marketing	40%	50%	14%	38%	20%	34%
Sponsoring or starting a blog or wiki for customers	17%	53%	17%	41%	24%	37%
Viral or participatory advertising	20%	47%	25%	33%	26%	37%
Advertising in virtual worlds	23%	43%	18%	33%	18%	30%

Base: 30 Canadian manufacturing marketers; 85 US manufacturing marketers; 816 US marketers overall

Q11 Marketers survey: “Which of the following emerging digital marketing tactics have you used in the past 12 months?”

Q12 Marketers survey: “Which of the following emerging digital marketing tactics are you likely to consider using in the next two years (through 2009)?”

As the use of digital media within the Canadian manufacturing industry grows, how engaged or involved are decision makers in traditional industry-specific media?

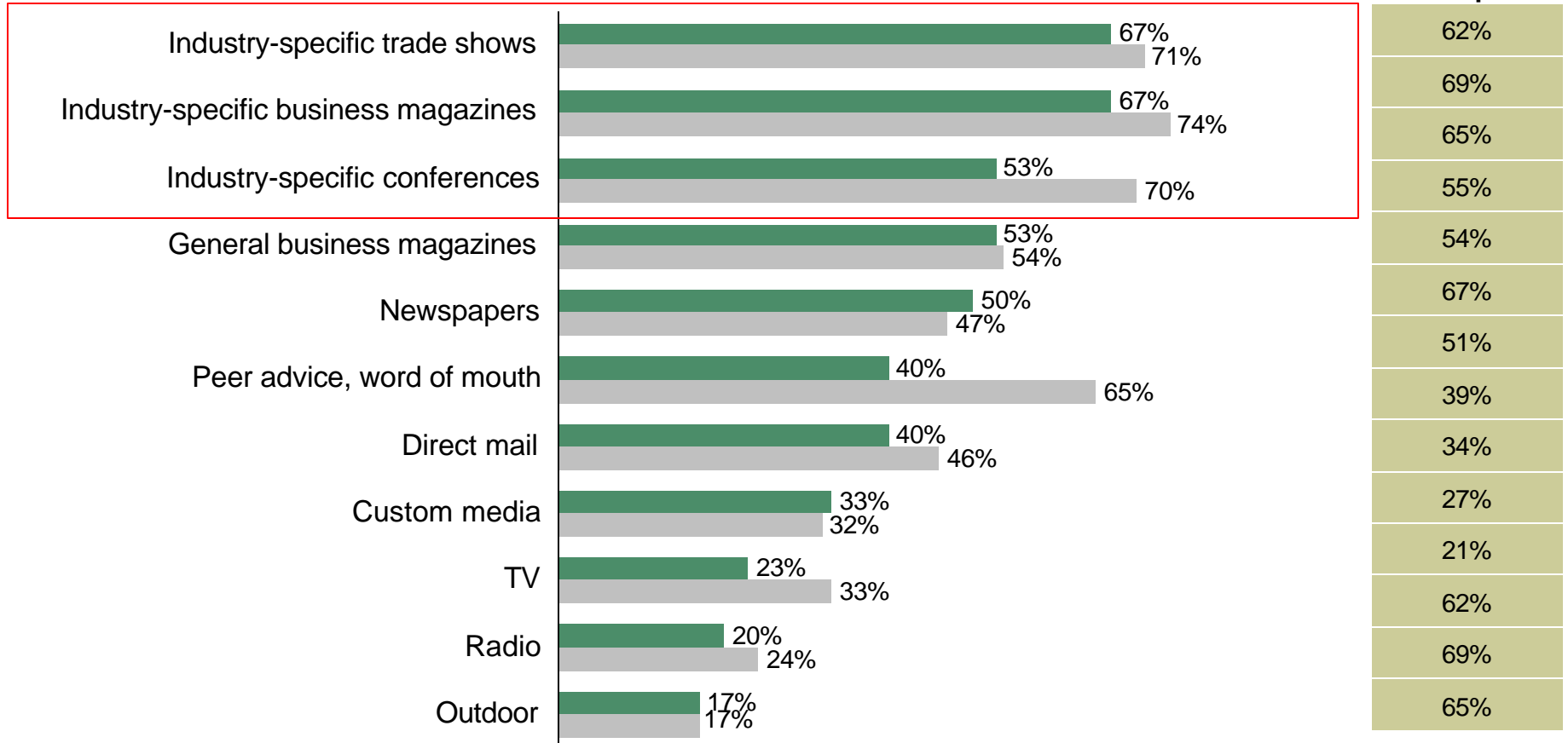
What value do traditional industry-specific media platforms offer Canadian manufacturing decision makers?

Do Canadian manufacturing marketers recognize these trends?

Similar to US counterparts, Canadian manufacturing B2B decision makers rate industry-specific traditional media #1 for on-the-job use

“Which *traditional* B2B media do you use to do your job?”

■ Canadian Manufacturing B2B Decision Makers ■ US Manufacturing B2B Decision Makers



Base: 30 Canadian manufacturing decision makers; 89 US manufacturing decision makers; 878 US decision makers overall

S7: Decision Makers survey: Which of the following types of traditional B2B media do you read or interact with to do your job?

Q11 Decision Makers survey: Please indicate which of the following media best helps you do the following activities.

Canadian manufacturing B2B decision makers are highly involved and engaged in industry-specific media, a finding similar to their US counterparts except in the case of Web-based events

B2B Decision Makers	Canadian Manufacturing		US Manufacturing	
Media involved with	Frequency	Time spent	Frequency	Time spent
Industry-specific business magazines	45% read 3 magazines or more last month	30% spent 3 hours or more reading per week	73% read 3 magazines or more last month	34% spent 3 hours or more reading per week
Industry-specific conference or trade show	46% attended 3 conferences or trade shows or more during the past 12 months	35% spent 5 days or more at conferences or trade shows during the past 12 months	44% attended 3 conferences or trade shows or more during the past 12 months	49% spent 5 days or more at conferences or trade shows during the past 12 months
Industry-specific Web sites	39% visited 5 Web sites or more last month	31% spent 3 hours or more on Web sites per week	53% visited 5 Web sites or more last month	46% spent 3 hours or more on Web sites per week
Web-based events	25% attended 3 Web-based events or more during the past 12 months	N/A	76% attended 3 Web-based events or more during the past 12 months	N/A

Q1C BDM survey: In the past month, approximately how many different industry/profession-specific business magazine titles did you read?

Q2 BDM survey: In the past week, approximately how much time have you spent reading industry/profession-specific business magazines?

Q3 BDM survey: In the past month, approx. how many different industry/profession-specific Web sites did you visit, including online editions of B2B magazines?

Q4 BDM survey: In the past week, approximately how much time have you spent visiting industry/profession-specific Web sites?

Q5 BDM survey: During the past 12 months, how many times did you attend an industry/profession-specific conference or trade show?

Q6 BDM survey: During the past 12 months, approx. how many days in total did you spend attending industry/profession-specific conferences/trade shows?

Q7 BDM survey: During the past 12 months, how many times did you attend a Web-based event (e.g., Webinars, WebEx product demos, virtual conferences)?

Also similar to US counterparts, the majority of Canadian manufacturing B2B decision makers find industry-specific *content and advertising* more engaging than general business media

Statements about engagement	Canadian Manufacturing	US Manufacturing	US Total Sample
When reading or interacting with industry/profession-specific business magazines, I find that I spend more time reading or thinking about the editorial content and product/service messages than with other general business media	80%	81%	80%
When visiting an industry/profession-specific Web site, I find that I spend more time reading and thinking about the content than with other more general Web sites or portals	70%	80%	83%

Base: 30 Canadian manufacturing decision makers; 89 US manufacturing decision makers; 878 US decision makers overall

Q14 Decision Makers survey: Please rate your level of agreement with the following statements.

Canadian manufacturing B2B decision makers favor peer advice, vendor Web sites, and blogs for informing or validating their purchase decisions

“Which business-related media are most effective at informing or validating your firm's business purchase decisions?”

B2B Decision Makers	Canadian Manufacturing	US Manufacturing	US Total Sample	Can. Man.	US Man.	US Total Sample
Media	Percentage	Percentage	Percentage	Base	Base	Base
Peer advice, word of mouth	75%	45%	48%	12	58	584
Vendors' Web sites	65%	46%	48%	20	68	582
B2B blogs	56%	36%	32%	9	25	273
Custom media	50%	29%	27%	10	28	343
Email	50%	39%	40%	22	65	666
Industry-specific trade shows	45%	51%	45%	20	63	544
Online forums, communities, or social networks	33%	44%	32%	6	27	304
General business magazines	25%	21%	27%	16	48	484
Industry-specific conferences	25%	34%	44%	16	62	569
Industry-specific Web sites	23%	47%	45%	13	51	485
Specialized business Web sites (e.g. IndustryLink.com)	20%	49%	37%	10	35	354
Industry-specific business magazines	15%	39%	40%	20	66	609
Web-based events	8%	40%	37%	12	50	458

Q9 BDM survey: For each business related media that you read or interact with, which are most effective at informing/validating your firm's business purchase decisions?”

Canadian manufacturing B2B decision makers rank industry-specific platforms as favorably as US counterparts – but select industry-specific tradeshows as the best medium overall

Percentage of business decision makers who chose the following media as *the best medium* for the following statements:

Response	Industry-specific Web sites		Industry-specific magazines		Industry-Specific tradeshow	
	Canadian Manufacturing	US Manufacturing	Canadian Manufacturing	US Manufacturing	Canadian Manufacturing	US Manufacturing
Keeps me ahead of the competition	20% (2)	21% (2)	17% (3)	23% (1)	23% (1)	14% (4)
Provides objective information	20% (1)	28% (1)	13% (3)	24% (2)	20% (1)	9% (5)
Helps me do my job better	20% (1)	15% (1)	13% (2)	15% (1)	13% (2)	11% (4)
Helps me grow my business	17% (2)	17% (2)	13% (3)	21% (1)	23% (1)	12% (3)
Helps me advance my career	17% (2)	19% (1)	10% (4)	14% (4)	20% (1)	16% (3)
Helps me become aware of new products or services	13% (3)	14% (3)	17% (2)	27% (1)	23% (1)	25% (2)
Provides information that I can trust	10% (2)	23% (2)	7% (3)	24% (1)	27% (1)	7% (5)

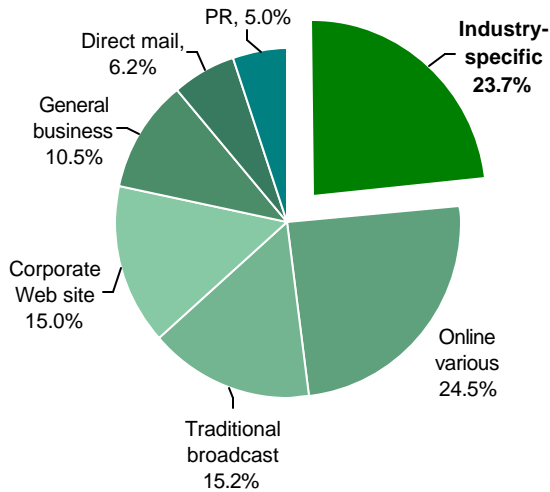
Base: 30 Canadian manufacturing decision makers; 89 US manufacturing decision makers; 878 US decision makers overall

Q11 Decision Makers survey: Please indicate which of the following media best helps you do the following activities.

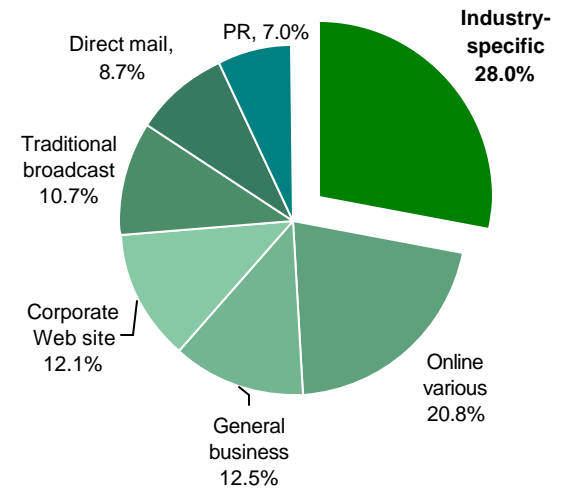
Despite the high marks given to industry-specific media, Canadian manufacturing marketers spend a significant percentage of their budgets on media that B2B decision makers use or rely on less

Reported % trade marketing budget spent on each marketing tactic in 2007

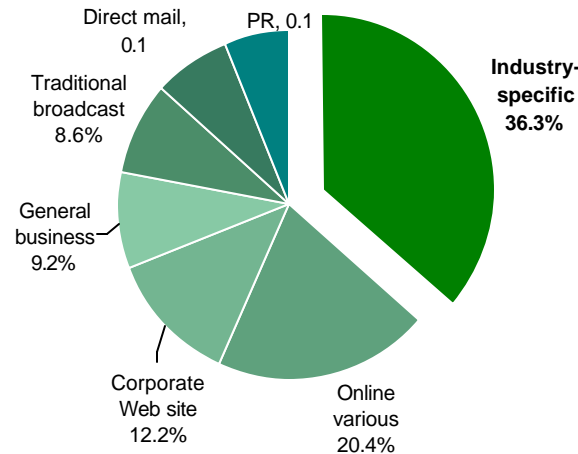
Canadian manufacturing marketers



US Total Sample marketers



US manufacturing marketers



Base: 30 Canadian manufacturing marketers; 85 US manufacturing marketers; 816 US marketers overall

Q2 Marketers survey: Estimate the percent of your B2B trade marketing budget to be spent on each marketing tactic in your company's fiscal 2007

When integrated together, do industry-specific media influence Canadian manufacturing decision makers more than when used alone?

Do Canadian manufacturing marketers agree that integrating media works better for them?

How important are digital and traditional media to Canadian manufacturing marketers' sales processes?

Integrated media help Canadian manufacturing B2B decision makers recognize brands and helps Canadian manufacturing marketers to reach buyers and stay top-of-mind.

“Please indicate your level of agreement with the following statements”

B2B Decision Makers who agree . . .	Canadian Manufacturing	US Manufacturing	US Total Sample
It is easier for me to recognize or remember a company’s brand or products/services when I see messages about it in multiple media such as magazines, online, or at events	87%	92%	90%

Base: 30 Canadian manufacturing decision makers; 89 US manufacturing decision makers; 878 US decision makers overall

B2B Marketers who agree . . .	Canadian Manufacturing	US Manufacturing	US Total Sample
Integrating our marketing messages and advertising across multiple industry/profession-specific business-to-business media allows us to reach buyers that we might not have engaged using one medium alone	100%	89%	93%
Our company or brands becomes more top of mind when buyers see our messages in more than one industry/profession-specific business-to-business medium	97%	93%	91%
Prospective buyers get more information about our company or brands when they see messages in more than one industry/profession-specific B2B medium	90%	98%	90%
Buyers and customers are more likely to consider our company’s products or services when they see messages for our company in more than one industry/profession-specific business-to-business medium	87%	91%	91%
Our firm gets more qualified buyers when we integrate industry/profession-specific business-to-business media like print and events with online media like Web ads and sponsored links.	83%	84%	85%

Base: 30 Canadian manufacturing marketers; 85 US manufacturing marketers; 816 US marketers overall

Q14 Decision Makers survey: Please rate your level of agreement with the following statements:

Q9 Marketers survey; Please indicate your level of agreement with the following statements

Industry-specific media help open doors for Canadian manufacturing sales people

B2B Decision Makers who agree . . .	Canadian Manufacturing	US Manufacturing	US Total Sample
B2B Decision Makers who say seeing a message in industry-specific media makes them more receptive to a salesperson.	90%	82%	82%

Using business media to reach buyers is very important because Canadian manufacturing B2B decision makers have less time to spend with sales reps

B2B Decision Makers who agree . . .	Canadian Manufacturing	US Manufacturing	US Total Sample
B2B Decision Makers who say the amount of time they spend with sales reps has decreased or stayed the same during the past 12 months	93%	73%	78%
B2B Decision Makers who see sales reps less than once per month	70%	64%	69%

Base: 30 Canadian manufacturing decision makers; 89 US manufacturing decision makers; 878 US decision makers overall

Q12 Decision Makers survey: During the past 12 months, how often did sales reps from product or service companies contact you?

Q13 Decision Makers survey: How has the amount of time you spend with sales representatives changed over the past 12 months?

Q14 Decision Makers survey: Please rate your level of agreement with the following statements.

Canadian manufacturing marketers overwhelmingly believe industry-specific events and media increase sales effectiveness

“Please indicate your level of agreement with the following statements”

B2B Marketers who agree . . .	Canadian Manufacturing	US Manufacturing	US Total Sample
Face-to-face events help our salespeople engage buyers more effectively	100%	93%	96%
Buyers who visit our Web site are more likely to take a call from our salespeople	97%	85%	90%
Our salespeople feel that messages in industry/profession specific business-to-business media help to build their credibility	93%	89%	91%
Messages in industry/profession specific business-to-business media makes it easier for our salespeople to call on prospect	90%	85%	88%
Web-based seminars help our salespeople engage buyers more effectively	80%	72%	75%

Base: 30 Canadian manufacturing decision makers; 89 US manufacturing decision makers; 878 US decision makers overall

Q10 Marketers survey: Please indicate your level of agreement with the following statements

Which future trends in media use by Canadian manufacturing decision makers and marketers are most important?

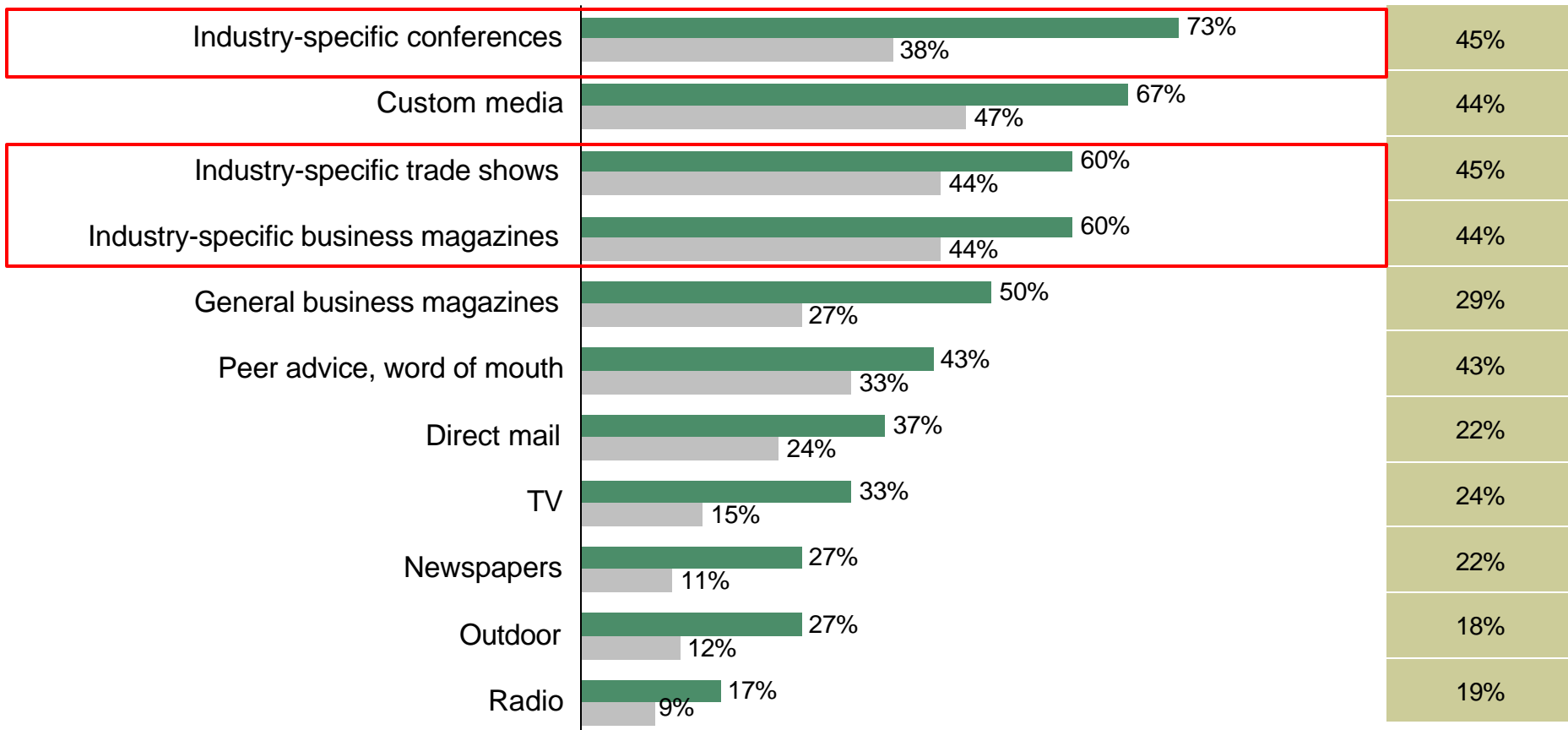
Canadian manufacturing B2B decision makers expect to increase their use of traditional industry-specific media *significantly* in 2009 – more so than their US counterparts

“How will your use of *traditional* media change in the next two years (2009)?”

% who say their use of **traditional tactics** will “increase” or “increase significantly” in 2009.

■ Canadian Manufacturing B2B Decision Makers ■ US Manufacturing B2B Decision Makers

US Total Sample



Base: 30 Canadian manufacturing decision makers; 89 US manufacturing decision makers; 878 US decision makers overall

Q10 Decision Makers survey: How will your use of traditional media change in the next two years (2009)?

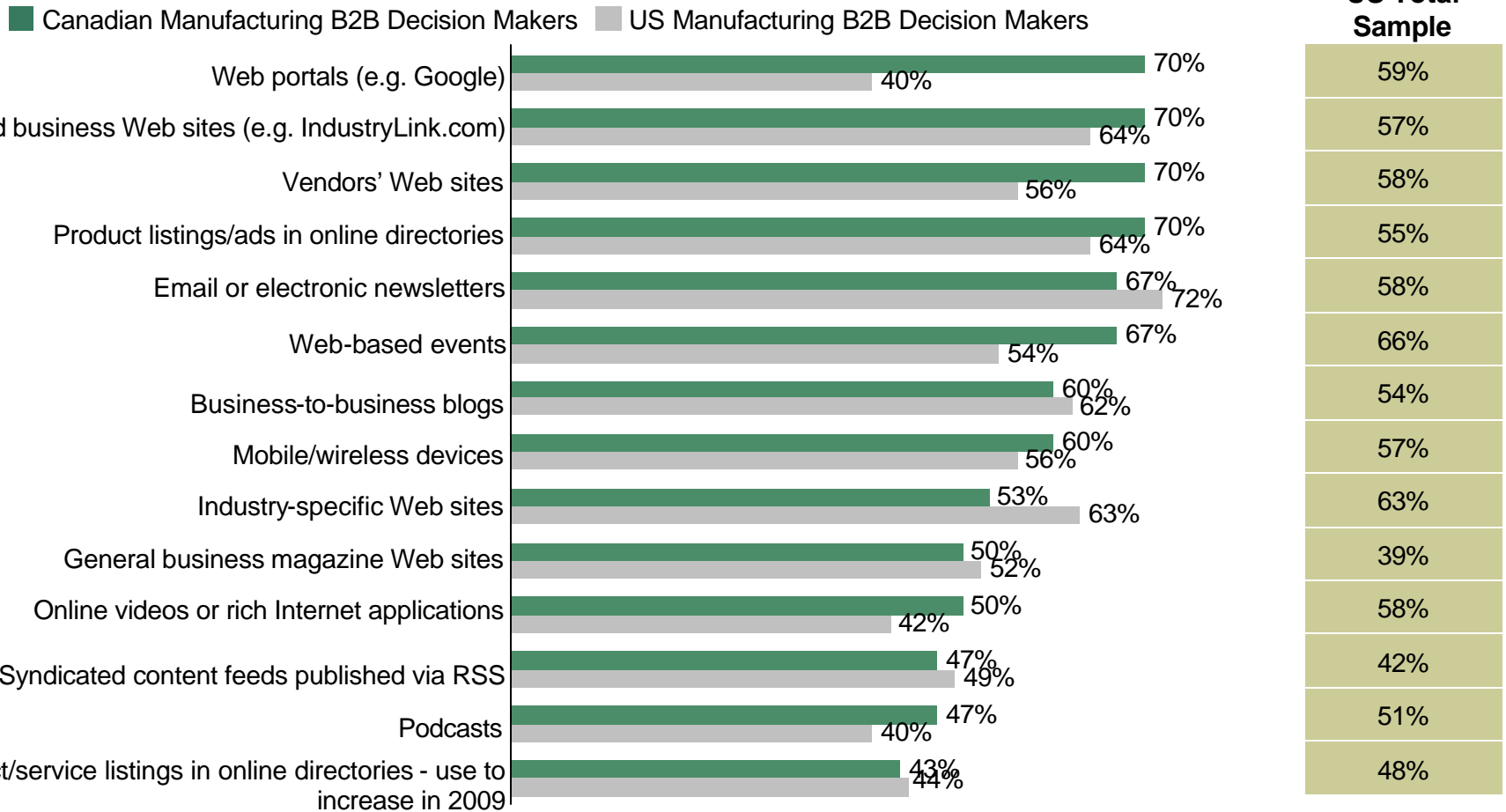
Entire contents © 2007 Forrester Research, Inc. All rights reserved.

FORRESTER

Canadian manufacturing B2B decision makers use of digital media will also increase significantly

“How will your use of *digital* media change in the next two years (2009)?”

% who say their use of **digital tactics** will “increase” or “increase significantly” in 2009.



Base: 30 Canadian manufacturing decision makers; 89 US manufacturing decision makers; 878 US decision makers overall

Q10 Decision Makers survey: How will your use of traditional media change in the next two years (2009)?

Entire contents © 2007 Forrester Research, Inc. All rights reserved.

Canadian manufacturing marketers plan to underutilize industry-specific magazines and events in their 2009 spending when compared to Canadian manufacturing B2B decision makers' planned use

“In 2009, how will your spending on the following marketing tactics to change compared with 2007?”

% who say their use of these tactics will “increase” or “increase significantly” in 2009

Media/tactic	B2B Decision Makers		B2B Marketers	
	Canadian Manufacturing	US Manufacturing	Canadian Manufacturing	US Manufacturing
Web based events	67%	72%	59%	62%
Industry specific web sites	53%	63%	61%	43%
Corporate web site	70%	64%	79%	62%
Web portals	70%	64%	63%	54%
Email	67%	54%	52%	56%
Industry specific trade shows OR conferences	80%	51%	70%	41%
Custom media	67%	47%	54%	39%
Industry specific business magazines	60%	44%	40%	37%
General business magazine web sites	50%	42%	48%	43%
Direct mail	37%	24%	21%	32%

Base: 30 Canadian manufacturing marketers; 85 US manufacturing marketers;
30 Canadian manufacturing decision makers; 89 US manufacturing decision makers

Q3: Marketers survey
Q10: BDM survey

Entire contents © 2007 Forrester Research, Inc. All rights reserved.