

2<sup>nd</sup> Annual com.motion-Pollara Social Media Barometer  
December 10, 2008

**com**.**motion** 

**POLLARA**

## **Research Objectives and Methodology**

The purpose of the survey was to measure attitudes towards social media tools, and how attitudes are changing during the current economic slowdown. In total, 2,434 Canadians aged 18 and over responded to the survey.

The survey consisted of two different sets of questions. One set of questions was asked of 401 respondents whose job is best described as one of the following:

- Management
- Marketing

The 1,653 respondents (including those in management and marketing) who said they have used online social media tools, were asked another set of questions.

Results are considered accurate to 2.0% nineteen times out of twenty.

## QUESTIONS OF BUSINESS LEADERS

1. The economic slowdown is forcing some marketers to modify spending plans. Looking forward to 2009, for each of the following, do you intend to spend more, less, or about the same, compared to the amount of money you spent on them in 2008?

	More money	The same	Less money	+/- percentage points
Social Media	23%	59%	16%	+7
Public Relations	24%	55%	19%	+5
Events and Promotions	17%	59%	22%	-5
Direct Marketing	15%	61%	22%	-7
Search Marketing	11%	62%	26%	-15
Banner Advertising	6%	60%	31%	-25
Newspaper Advertising	5%	61%	32%	-27
Radio Advertising	5%	61%	33%	-28
TV Advertising	4%	57%	37%	-33
Magazine Advertising	3%	56%	39%	-36

**2. Which of the following better reflects your point of view?**

In tough economic times, marketers should cut back spending on social and digital media to focus on traditional marketing techniques.	In tough economic times, marketers should spend smarter by diverting spending towards social and digital media.
<b>30%</b>	<b>70%</b>

**3. How familiar are you with social media tools such as Facebook, YouTube, blogs, MySpace, Wikipedia and Flickr?**

	More Familiar Than Your Customers (%)	About As Familiar As Your Customers (%)	Less Familiar Than Your Customers (%)
2007	28%	46%	26%
2008	29%	53%	17%

**4. Which of the following best describes your point of view?**

	Social media tools like Facebook, YouTube and blogs have forever changed the communications landscape and are becoming more important than communications tools such as television, radio, newspapers and magazines (%)	Social media tools like Facebook, YouTube and blogs are important, but will never be as powerful a communications tool as television, radio, newspapers and magazines (%)	Social media tools like Facebook, YouTube and blogs are a fad. (%)
2007	46%	39%	15%
2008	46%	46%	7%

**5. How supportive are senior management and/or the board of your company towards greater investment in using social media to reach out to customers?**

Very Supportive 22%  
 Somewhat Supportive 55%  
 Somewhat Opposed 16%  
 Strongly Opposed 5%  
 Refuse To Answer 1%

**6. Which of the following forms of social media has your brand or organization engaged in?**

Advertising On Social Media Websites	41%
Social Networking Such As Facebook Or MySpace	39%
Monitoring Online Conversations	21%
Creation Of A Proprietary Online Community	20%
Video Sharing Such As YouTube	14%
Influencer Relations Such As Blogger Outreach	13%
Collaborative Tools Such As Wikis	13%
Photo Sharing Such As Flickr	8%
Refuse To Answer	20%

## Questions of Canadians

*The following question was asked of all respondents.*

**7. Have you ever used online social media tools such as Facebook, YouTube, blogs, MySpace, Wikipedia and Flickr?**

	2007	2008
Yes	71%	79%
No	29%	21%

**\*This table excludes those who did not answer.**

*The following questions were asked of all respondents who answered yes to question 7*

**8. In which of the following ways do you regularly access social media?**

Home Computer	96%
Work Computer	23%
Another Computer	10%
Mobile Device, Lk Blackberry/Cell Phone	12%
Refuse To Answer	<1%

**9. On average, how often do you use blogs?**

Most Days	6%
Several Times A Week	7%
Around Once A Week	8%
Once Or Twice A Month	8%
Less Than Once A Month	16%
Never	50%
No Answer/Refused	6%

**10. On average, how often do you use Facebook?**

Most Days	37%
Several Times A Week	15%
Around Once A Week	13%
Once Or Twice A Month	10%
Less Than Once A Month	12%
Never	12%
No Answer/Refused	1%

**11. On average, how often do you use YouTube?**

Most Days	9%
Several Times A Week	18%
Around Once A Week	17%
Once Or Twice A Month	18%
Less Than Once A Month	21%
Never	16%
No Answer/Refused	1%

**12. On average, how often do you use MySpace?**

Most Days	2%
Several Times A Week	3%
Around Once A Week	5%
Once Or Twice A Month	5%
Less Than Once A Month	16%
Never	61%

**13. On average, how often do you use Wikipedia?**

Most Days	8%
Several Times A Week	12%
Around Once A Week	15%
Once Or Twice A Month	16%
Less Than Once A Month	16%
Never	28%
No Answer/Refused	5%

**14. On average, how often do you use Flickr?**

Most Days	< 1%
Several Times A Week	3%
Around Once A Week	3%
Once Or Twice A Month	6%
Less Than Once A Month	12%
Never	69%
No Answer/Refused	6%

**15. On average, how often do you use Twitter?**

Most Days	2%
Several Times A Week	2%
Around Once A Week	2%
Once Or Twice A Month	2%
Less Than Once A Month	5%
Never	82%
No Answer/Refused	6%

**16. On average, how often do you use Podcasts?**

Most Days	2%
Several Times A Week	3%
Around Once A Week	4%
Once Or Twice A Month	6%
Less Than Once A Month	12%
Never	67%
No Answer/Refused	6%

**17. How important are these social media tools in developing, maintaining and nurturing friendships?**

	Very Important	Somewhat Important	Not Very Important	Not important at all
<b>2007</b>	<b>9%</b>	<b>43%</b>	<b>34%</b>	<b>14%</b>
<b>2008</b>	<b>18%</b>	<b>47%</b>	<b>25%</b>	<b>10%</b>

**18. How important are social media tools in learning about products, services, organizations and brands?**

	Very Important	Somewhat Important	Not Very Important	Not important at all
<b>2007</b>	<b>12%</b>	<b>47%</b>	<b>29%</b>	<b>12%</b>
<b>2008</b>	<b>21%</b>	<b>44%</b>	<b>26%</b>	<b>8%</b>

**19. How important are social media tools to share your own thoughts and opinions about products, services, organizations and brands?**

	Very Important	Somewhat Important	Not Very Important	Not important at all
<b>2007</b>	<b>11%</b>	<b>42%</b>	<b>34%</b>	<b>13%</b>
<b>2008</b>	<b>18%</b>	<b>45%</b>	<b>27%</b>	<b>10%</b>

**How influenced are you by positive reviews of products, services, organizations, or brands, on blogs?**

Very Influenced	3%
Somewhat Influenced	26%
Not Very Influenced	22%
Not At All Influenced	30%
Refuse To Answer	18%

**How influenced are you by negative reviews of products, services, organizations, or brands on blogs?**

Very Influenced	4%
Somewhat Influenced	25%
Not Very Influenced	23%
Not At All Influenced	29%
Refuse To Answer	19%

**How influenced are you by positive reviews of products, services, organizations, or brands, on social networking sites, like Facebook or MySpace?**

Very Influenced	4%
Somewhat Influenced	26%
Not Very Influenced	27%
Not At All Influenced	25%
Refuse To Answer	18%

**How influenced are you by negative reviews of products, services, organizations, or brands, on social networking sites, like Facebook or MySpace?**

Very Influenced	4%
Somewhat Influenced	25%
Not Very Influenced	27%
Not At All Influenced	25%
Refuse To Answer	19%

**How influenced are you by positive reviews of products, services, organizations, or brands, on discussion forums and message boards?**

Very Influenced	7%
Somewhat Influenced	35%
Not Very Influenced	21%
Not At All Influenced	18%
Refuse To Answer	18%

**How influenced are you by negative reviews of products, services, organizations, or brands, on discussion forums and message boards?**

Very Influenced	8%
Somewhat Influenced	32%
Not Very Influenced	21%
Not At All Influenced	21%
Refuse To Answer	19%