Business to Business Marketing:

BDC VIEWPOINTS STUDY – September 2013

Research and Market Intelligence at BDC

BDC Entrepreneurs first

Canada

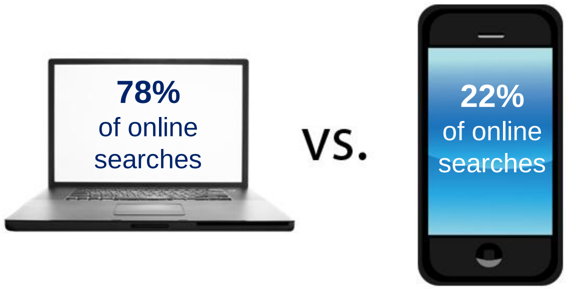
Executive summary: B2B marketing survey

SEARCH

Most influential sources of information:
- Company websites
- Business network
- Employees or business partners
- Customer review sites
- Trade shows

Website content perceived as a **must**:
- List of products and services offered
- Contact information and coordinates
- Clear description and potential use of products and services

Other valuable content:
- Reliability of a product, service or company
- Excellence of customer service
- Ability of company employees to diagnose, understand and resolve issues



DECISION-MAKING

> People complete **57%** of the purchase decision-making process before contacting a sales representative

> **Gut feeling** is an important component of the decision-making process

> The **higher the risk** associated with a purchase, **the more information people seek** before contacting a sales representative

> Entrepreneurs have a slight preference for a sales representative who **comes to visit** them at their office, store or plant

> The larger the company, the more likely it is that a **decision will be made by a group** rather than an individual

> Brand is an important decision factor for **only certain products and services,** such as technological devices, financial services, and equipment and machinery

CONTENT & CONVERSION

> **Business owners** are the main **content developers** for both the company website and social media postings

> **53%** of respondents **track** and **analyze** online visits

> **30%** of clients became customers as a result of **Internet** (influenced by the company website or by content available online)

> **57%** of respondents believe they **lose** potential customers in the **two first steps** of the buying journey (i.e., initial consideration and active evaluation)

> **54%** do **not** conduct any **post-mortem** evaluation of their integrated marketing campaigns

> **Ecommerce**, at this point in time, is more common in **certain industry sectors,** such as technological devices, Internet services and office supplies

Context and methodology

Context and methodology

> BDC emailed 2,906 invitations to complete the survey to members of the BDC ViewPoints panel. The survey was available online between August 27 and September 9, 2013. A total of 438 entrepreneurs completed the survey.

> The responses from entrepreneurs were weighted according to region and company size. The BDC Research and Market Intelligence team analyzed the results.

B2B or business-to-business marketing differs from the more common B2C or business-to-consumer sales process. Through this study, the BDC ViewPoints team wanted to better understand the B2B client journey by looking at such aspects as:

- The purchase decision-making journey
- Content development, tracking and conversion
- Online activities

Purchase decision-making journey

Sources of information

Internet sources have become the go-to and most influential sources of information

Go-to sources of information

> More than four out of five respondents use **Internet search engines** (87%) and **company websites** (81%) when seeking information about a product, service or company.

> Going online may be among the first steps business leaders take to get informed. From there, respondents seem to consult their **business network (**i.e., contacts and associations) (61%), as well as their **employees and business partners** (44%).

> In a B2B environment, **trade and business-related magazines** and publications also seem to play an important role (38%), especially among businesses with fewer than five employees (44%).

> One-third of respondents (33%) mentioned **trade shows.** This proportion climbs to 51% among businesses with 50 or more employees.

Most influential sources of information

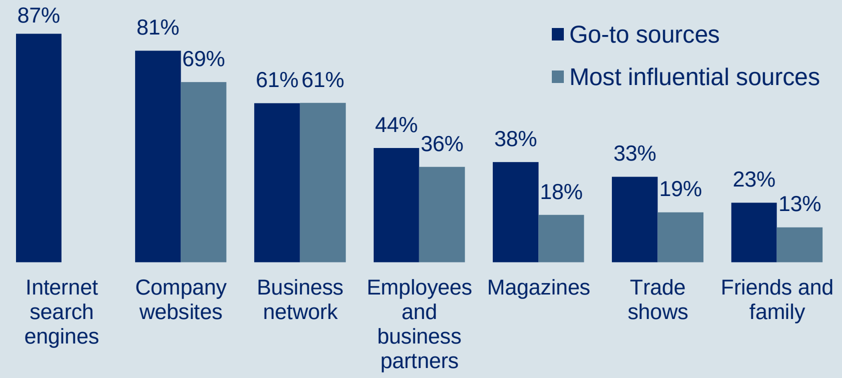
> The most influential sources of information resemble the most prominent go-to sources. **Company websites** (69%) top the list, followed by the respondent's **business network** (61%) and **employees** (36%).

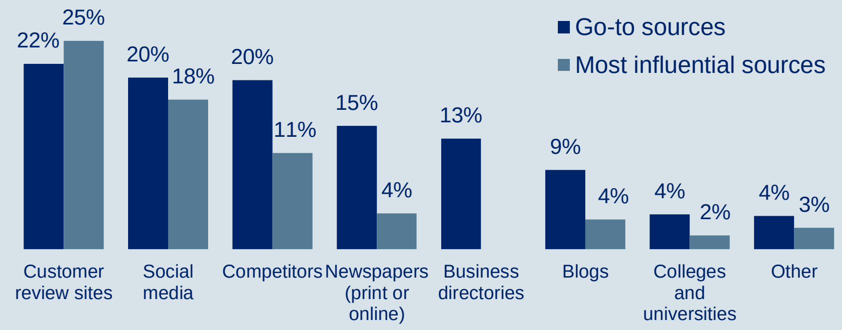
> It is worth noting than one-quarter of respondents indicated that **customer review sites** (25%) are among their most influential sources of information.

Key take-away:

> **Overall, 99% of respondents use at least one online source of information and 82% of them consider at least one of these sources quite influential. Businesses that operate in the B2B realm must not only be present online but must also provide value-added information, and get online and offline users to talk about them favourably.**

Top sources of information
Multiple answers allowed (n=438)





Base: All respondents.

Content available on a company website

Not all content available on a company website has the same value or impact

> Respondents were presented with a list of 20 elements usually found on a company website and asked to determine whether the element was a must, a good addition, a nice-to-have item or of little value.

Content perceived as A MUST

> Three distinct items were perceived as musts:

- A list of products and services offered (a must for 86% of respondents)
- Contact information and coordinates, such as names, titles, phone numbers, emails and a physical address (a must for 82% of respondents)
- A clear description and potential use of products and services (a must for 78% of respondents)

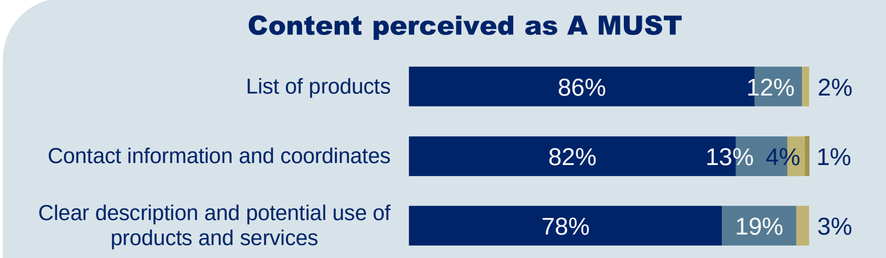
Content perceived as A GOOD ADDITION

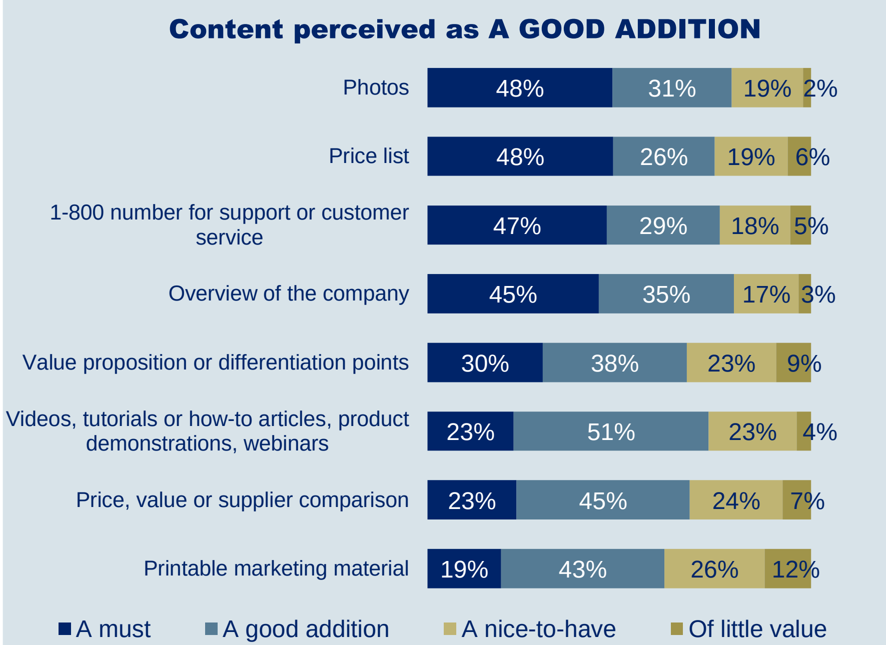
> Several elements were deemed good additions that should appear on a company website:

- Photos
- A price list
- A 1-800 number for support or customer service
- An overview of the company (e.g., years in business, market, organizational structure, business experience, etc.)
- Value proposition or differentiation points
- Videos, tutorials or how-to articles, product demonstrations, webinars
- Price, value or supplier comparison
- Printable marketing material

Key take-away:

> **By default, all websites should include the elements perceived as musts and these elements should be easily accessible. A mobile-friendly or condensed version of the website should focus on accessibility. Elements perceived as good additions can really make a company and website stand out from the crowd.**





Base: Respondents who use Internet search engines or company websites when they are seeking information about a product, service or company. Due to rounding, the sum of the results may not equal 100%. (n=428)

Content available on a company website (cont’d)

Elements perceived as nice-to-have items should only be further developed once elements of greater impact have been included

> Although elements perceived as nice-to-have items do not influence viewers to the same extent as other elements, this does not mean they should be ignored. In fact, a significant proportion of respondents perceived some of the items we put in the nice-to-have category as musts. The relative importance of these elements depends on the industry, the level of information required to make a decision and the level of risk associated with a purchase.

Content perceived as NICE-TO-HAVE items

> Most of the following elements help interested parties make decisions by providing concrete examples, reassurance and insight:
- Testimonials or case studies
- Online support and chat functions
- White papers, research reports, ebooks, tips, best practices, self-diagnostics, etc.
- A list of clients and business partners associated with the company
- Social media links

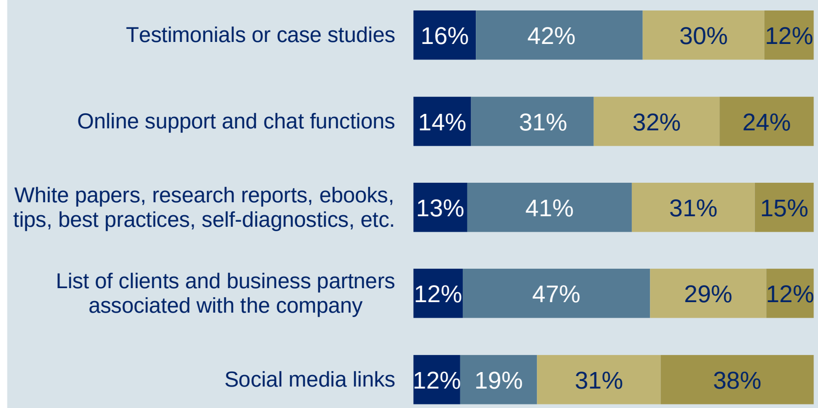
Content perceived as being OF LITTLE VALUE

> These elements enable a company to show other facets of their business:
- Loyalty program: Description, benefits, newsletter and registration process
- Company awards, recognition and media citations
- Community involvement and corporate social responsibility information
- Company blog

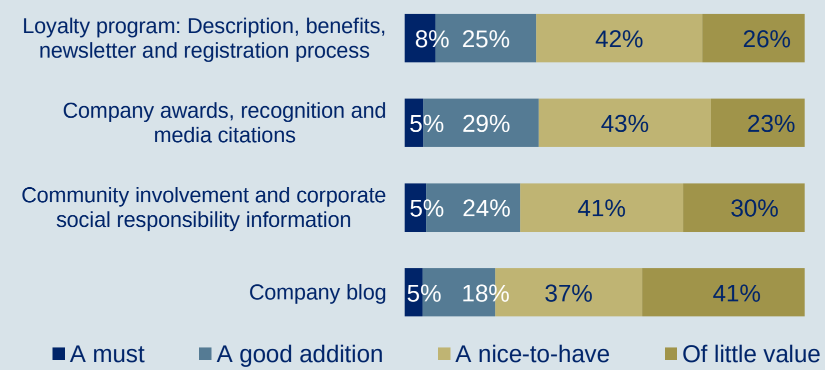
Key take-away:

> **Ideally, a business leader should have a good sense of his or her target customers—the content they consume online, the types of questions they need answered, and the step at which the firm is most likely to convert or lose them—in order to develop appropriate online content.**

Content perceived as NICE-TO-HAVE items



Content perceived as being OF LITTLE VALUE



Base: Respondents who use Internet search engines or company websites when they are seeking information about a product, service or company. Due to rounding, the sum of the results may not equal 100%. (n=428)

B2B or B2C online searches using a smartphone or tablet

The proportion of online searches conducted via smartphone is growing. Thus, it is smart to develop a mobile-friendly website.

> In most cases, people tend to conduct more local searches when using their smartphones. This is very important for businesses that serve a consumer base (B2C).

> However, more and more businesspeople are viewing their email via their smartphone. If the content of the email then redirects them to a company website, the interaction may stop there if the website is not mobile friendly…and the email may be deleted altogether!

> Tablets have also gained a lot of momentum in recent years, as more businesspeople use them as an alternative to laptops. Some sales representatives are now using tablets to give presentations and to showcase their offerings.

Smartphone and tablet usage

> On average, respondents conduct just over one-fifth (22%) of their online searches using their smartphone or tablet.

> Although one-quarter of respondents (26%) never conduct online searches with a smartphone or tablet, three-quarters of them do so to some extent.

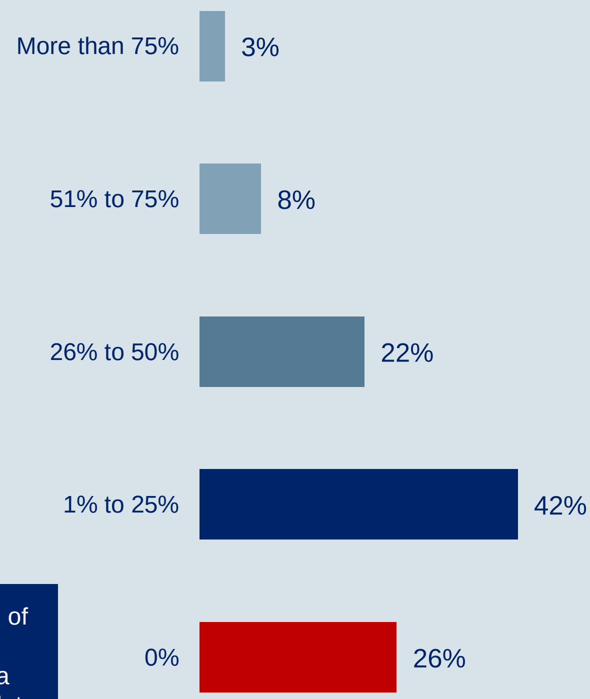
Key take-aways:

> **Given that people may conduct searches in various locations and want quick answers, it is important that the first page of a website include or have easy access to such information as a physical address, contact phone numbers or emails, and a clear description of the product or service.**

> **Companies may also want to include certain functions, such as a one-touch phone call function, or even limited promotional offers that can enhance quick conversions.**

> **Mobility has momentum. The proportion of smartphone users is increasing; so, too, is the adoption of tablets in the business environment. Therefore, mobility has become very important for firms in the B2C realm and will become more important for those in the B2B one.**

When seeking information about a product, service or company, what percentage of the time do you conduct an online search using a smartphone or tablet?
(n=436)



On average, **22%** of searches are conducted using a smartphone or tablet

Base: All respondents. Due to rounding, the sum of the results may not equal 100%.

Additional valued input

Information pertaining to reliability, to the excellence of customer service and to the abilities of company employees can improve a referral or review

Most valued additional input

> When interacting with dynamic sources—such as individuals, customer review sites or online communities—most business leaders find comments related to the following beneficial:
- The reliability of a product, service or company (78%)
- The excellence of customer service (pre- and post-purchase) (73%)
- The ability of company employees to diagnose, understand and resolve issues (67%)
- Experience with a product, service or company (63%)

Value of additional input

> To a lesser extent, quite a few respondents mentioned that they value information regarding:
- Willingness to do business with a company again (53%)
- Price (48%)
- Contact details (44%)

Key take-aways:

> **Word of mouth and referrals are often the best publicity for a company. The statistics above provide some guidance as to the type of information that can best influence the decision-making process.**

> **When revisiting the company's sales pitch, asking for a referral or having someone post a review online, it is important to highlight the elements that the entrepreneurs surveyed value the most.**

When interacting with a dynamic source such as individuals, customer review sites or online communities, what type of information is most beneficial to help you along in your decision-making process? Multiple answers allowed (n=429)

Base: All respondents. Those who preferred not to answer were excluded from the calculation base.

Decision-making process in the buying journey

Before contacting a supplier sales representative, business leaders have completed, on average, 57% of the purchase decision-making process

> Half of those surveyed (52%) mentioned that they had completed over half of their purchase decision-making process before contacting a supplier.

– Since most business leaders will have done some preliminary research on a given product, service or company before contacting a supplier, it is important to provide pertinent information to remain in the running and increase the likelihood of a potential client moving to the next stage in the journey.

Information needs to resonate on two levels

> **Logos:** Information provided can be **factual** and appeal to **rational** evaluation. This is the case for specifications, product applications and comparisons. Respondents said that the higher the risk associated with a purchase decision, the more information they seek before contacting a supplier sales representative directly (69% totally agreed). This highlights the importance of value-added information.

> **Pathos:** The vast majority of purchase decisions also have an **emotional** element. The overall look and feel, first impression, and wording of a website can significantly change the potential client's actions. Overall, gut feeling is important to more than four out of five respondents (84%) and very important to one-third of them (32%).

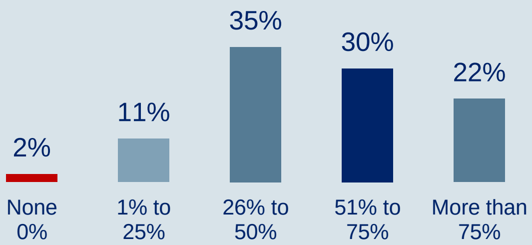
Key take-aways:

> **To increase the likelihood of a prospect becoming a client, information provided online and offline must have both logical and emotional appeal. The balance will vary depending on the type of product or service, industry sector, and individual preference, but both need to be addressed to a certain extent.**

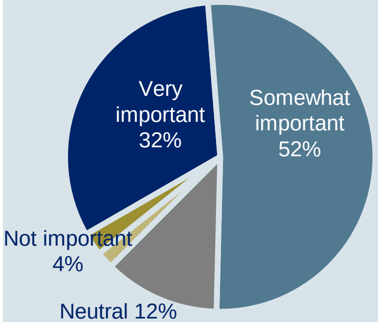
> **Gaining a good understanding of the elements that make a customer chose one business over its competitors is critical. Emphasizing those elements can help a company develop a competitive advantage.**

On average, what percentage of the purchase decision-making process have you completed before contacting a supplier sales representative directly for a given product or service? (n=411)

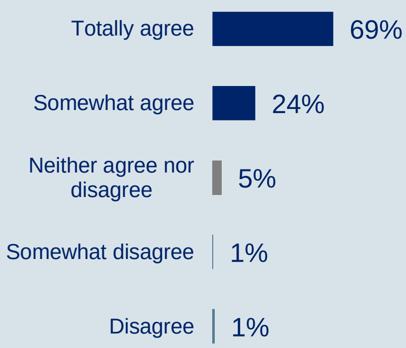
On average, people have completed **57%** of the purchase decision-making process before contacting a sales representative



Importance of gut feeling in the decision-making process (n=438)



"The higher the risk associated with a purchase decision, the more information I seek before contacting a supplier sales representative directly." (n=438)



Base: All respondents. Those who preferred not to answer were excluded from the calculation base.

Face-to-face meeting with a supplier

Most business leaders prefer meeting a supplier face to face in their office, store or plant

> Generally speaking, respondents (**39%**) **prefer that suppliers come to visit them** in their office, store or plant. This tends to be the case for companies with more than five employees.

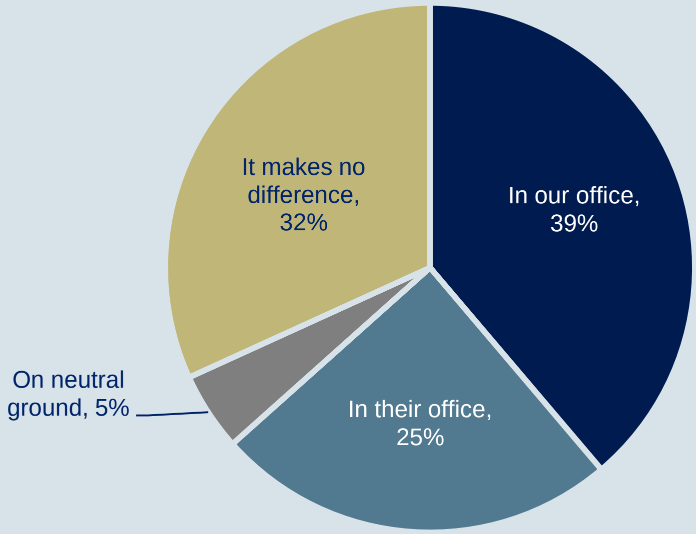
> Among respondents from businesses with fewer than five employees, preferences for meetings are almost evenly distributed among three options: in their own office, store or plant (29%); at the supplier's office, store or plant (31%); and it makes no difference (34%). However, compared with respondents from firms with more than 20 employees, they clearly prefer visiting a supplier in their office, store or plant.

Key take-aways:

> **If a business operates in the B2B realm and its potential clients are larger firms, then chances are that potential clients would prefer that a sales representative visit them. Therefore, it may be a good idea to offer to do so. Be prepared to meet with more than one person when visiting a larger firm.**

> **Conversely, if the potential clients are smaller firms, it is preferable to let them decide where the meeting should take place.**

Which of the following scenarios do you tend to prefer when meeting face to face with a supplier sales representative?
(n=437)



Base: All respondents. Those who preferred not to answer were excluded from the calculation base. Due to rounding, the sum of the results may not equal 100%.

Single decision-maker vs. group decision-maker

The larger the company, the more likely it is that decisions are made by a group rather than an individual

> Overall, respondents said that 68% of the time, an individual makes a purchase decision. Conversely, group decisions (a.k.a. buying centre) occur 32% of the time.

> For almost one-quarter of respondents (23%) over half of the decisions are made by a group. However, all decisions are made by an individual for one in five respondents (21%).

> Interestingly, the larger the company, the more likely it is that decisions will be made by a group:

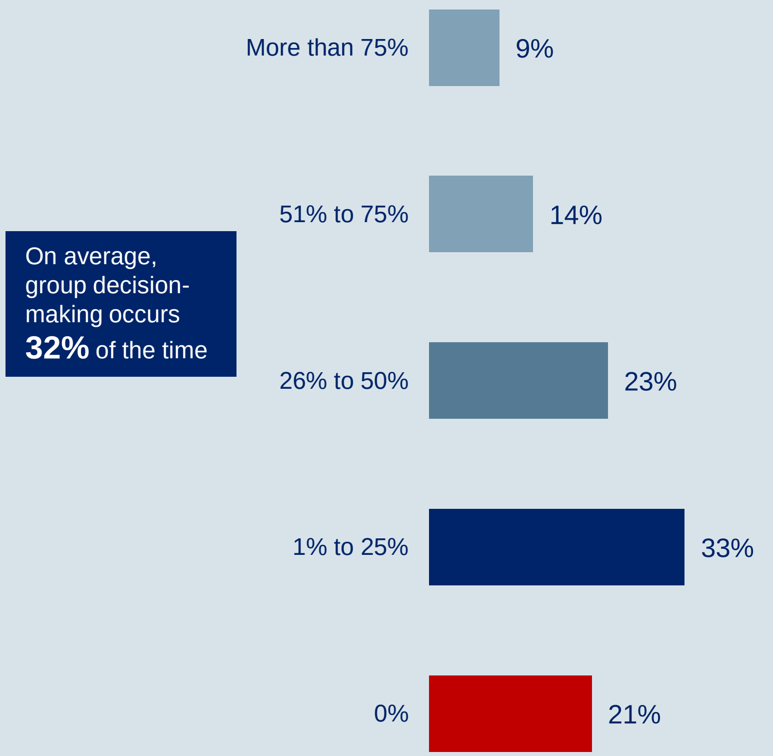
- Fewer than 5 employees (28%)
- Between 5 and 19 employees (33%)
- Between 20 and 49 employees (43%)
- 50 employees or more (52%)

Key take-aways:

> **Once again, results highlight the importance of understanding the target market. The likelihood of a purchase decision being made by a group rather than an individual has direct implications on the information and marketing material made available.**

> **Example: Although the end user may be the one visiting a company's website to gain information and better understand the offering, he or she may not be the one making the final decision. This may mean that the business needs to develop marketing material with different components to help the end user make a business case for using the company, product or service. Not only is it important to convince the end user of the advantages of using the company; one must also help the end user convey this internally.**

Generally speaking, in your company, what percentage of the time is a purchase decision made by a group? (n=438)



Base: All respondents.

Brand or name of a supplier as a decision factor

The brand or name of a supplier tends to be more important in relation to technological devices and components, equipment and machinery, and financial services

> Roughly three out of five respondents (59%) consider the brand or name of a supplier as a decision factor when shopping for **technological devices** and components, such as hardware, software and telephones.

> This is also the case for such **financial services** as banking and insurance (57%), and **equipment and machinery** (57%).

> The proportion decreases to one-third of respondents in categories such as professional services (32%), and Internet and technological services (30%).
– Companies with 50 or more employees (48%) are much more likely to consider the brand or name of a supplier as a decision factor when choosing a professional services provider. The fact that decisions are made by a group rather than an individual may partly explain this result.

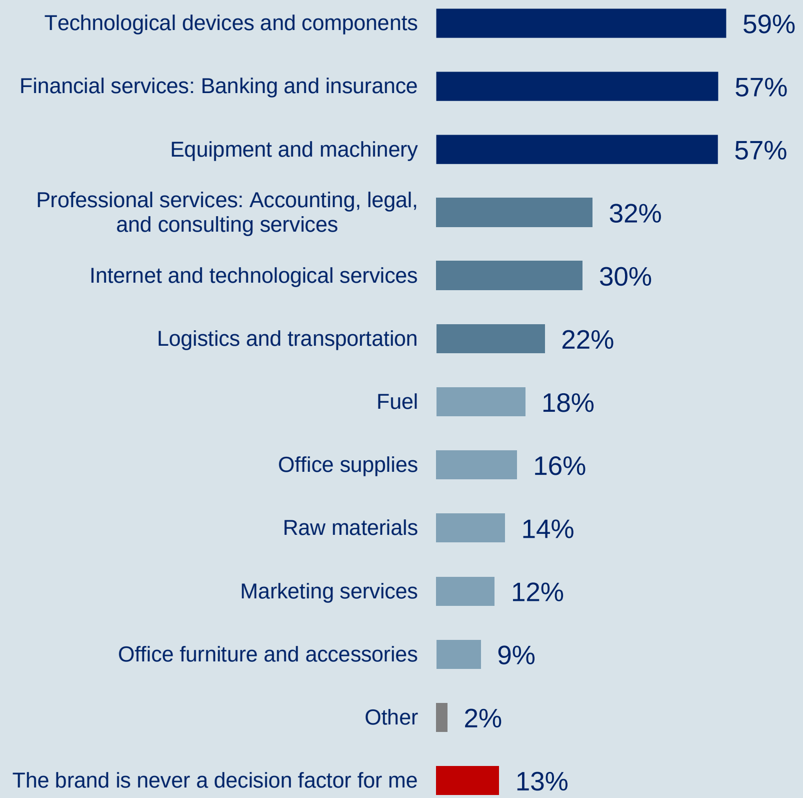
> Notably, **13%** of respondents indicated that **brand is never a decision factor** for them.

Key take-aways:

> **Unless a B2B business offers technological devices, financial services, or equipment and machinery, the brand or name of a supplier is unlikely to be a critical component in the buyer's decision-making process.**

> **This also means that businesses must highlight key differentiation points in their offering, since name alone will not suffice.**

For what types of products or services does the brand/name of the supplier represent a decision factor for you?
Multiple answers allowed (n=431)



Base: All respondents. Those who preferred not to answer were excluded from the calculation base.

Content development, tracking and conversion

Content development and social media

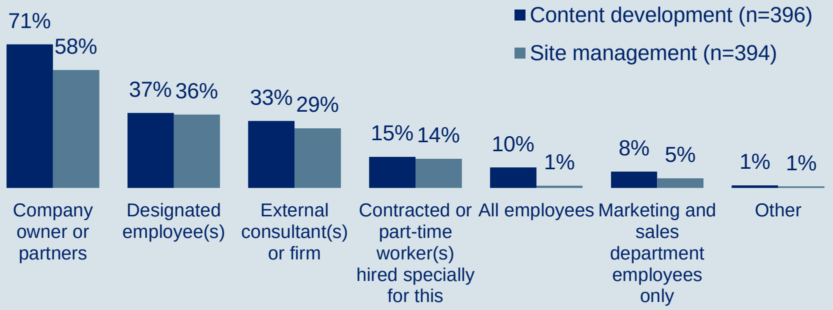
Most entrepreneurs help develop and manage content on their website and in social media

- **Company owners play an integral role in content development,** whether it be for the company's website (71%) or social media postings (70%).
  - There is a sharp contrast between businesses with fewer than 5 employees and those with 50 or more employees. In fact, 76% of owners of very small businesses participate in content development for the website versus 46% among firms with 50 or more employees. In terms of development of content for social media postings, the ratios are 80% versus 36%.
- When it comes to **management** of the corporate website, 58% of owners play a role. They are even more involved in managing their social media presence (64%).
- Once again, it is no surprise that we see a significant contrast and steady decline between very small firms and larger ones:
  - Owner involvement in corporate website management is more common in firms with fewer than 5 employees (68%) than in firms with 50 or more employees (29%). Owner involvement in social media management is also more common in firms with fewer than 5 employees (76%) than in firms with 50 or more employees (24%).
- Interestingly, a relatively high proportion of businesses call on **external consultants or firms** to develop and manage their corporate online content, particularly in Quebec.

Key take-aways:

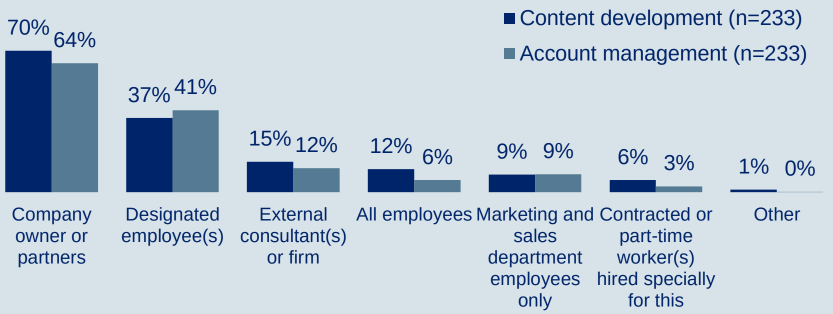
- **Company owners often know more about the business than anyone else in the firm. However, as the company grows, the owner's time might be better invested elsewhere.**
- **Assigning pertinent employees from different units (including the owner) to collaborate in developing content and postings should be part of a medium- to long-term strategy.**
- **External consultants or firms can bring a fresh, timely perspective on these initiatives.**

Involvement in the company's website
Multiple answers allowed



Base: Respondents who have a company website. Those who preferred not to answer were excluded from the calculation base.

Involvement in social media postings
Multiple answers allowed



Base: Respondents who use social media. Those who preferred not to answer were excluded from the calculation base.

Online tracking

Over half of respondents track visits to their website

> The great thing about web analytics tools is that many of them are quite affordable. This may explain why they are equally common in small and large companies. However, only half of the respondents surveyed (53%) analyze the types of visitors who access their website. Many businesses could benefit from basic analytics.

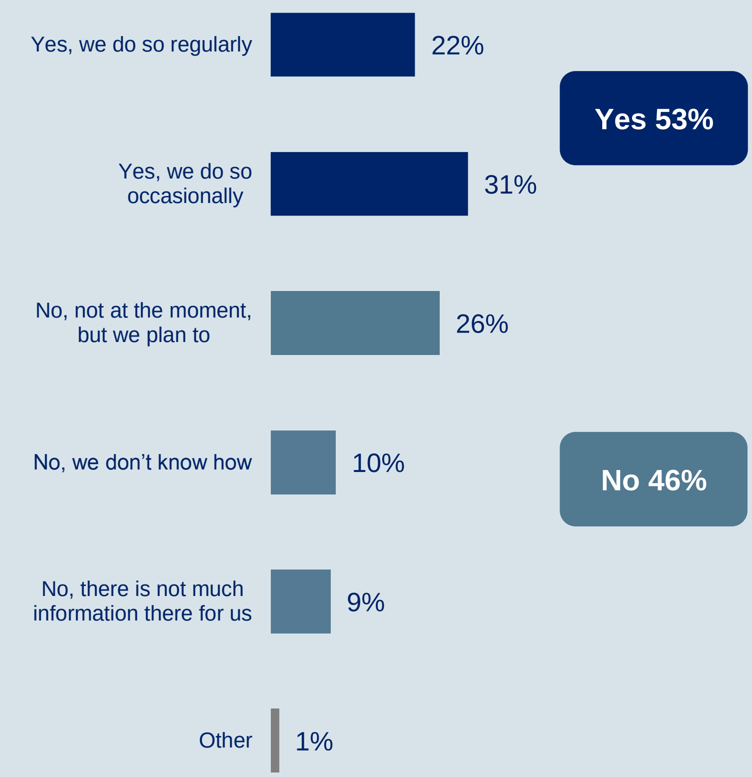
> Several tools (e.g., Google Analytics, Reinvigorate, KISSmetrics, Mint) can help companies track online visits. **These tools can provide invaluable insights** about the types of content and layout that resonate with website visitors.

Key take-away:

> **As mentioned earlier, online content is consumed by a large number of people. Not everyone can afford to conduct focus groups or usability testing to improve their website. Adding some analytics tools to the back end of a website can help any business improve its online presence.**

BDC has developed a comparison chart that can help you do a high-level analysis of some of the free and low-cost web analytics tools available.

Do you regularly analyze the types of visitors who access your website, and the content viewed and time spent?
(n=392)



Base: Respondents who have a company website. Those who preferred not to answer were excluded from the calculation base. Due to rounding, the sum of the results may not equal 100%.

Influence of online presence

The virtual world has an influence on the real world!

> When asked to estimate the proportion of their clients who became customers as a result of their website or who were influenced by content available on the Internet, on average, respondents said that 30% of their clients became customers as a result of the company's online presence.

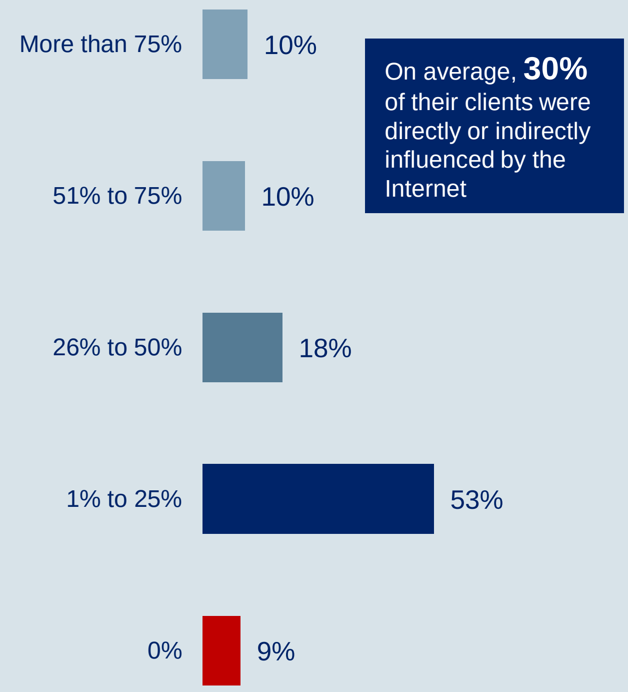
- Although it is not statistically significant, it is interesting that firms with fewer than 5 employees said that one-third of their clients (33%) were influenced by online content. This percentage is larger than that of any other group.

Key take-aways:

> **Fundamentally, the many elements that companies can use to market themselves can be categorized into two broad segments: advertising (initiatives for which one has to pay) and publicity (initiatives that can be free). It is important for a business to really understand what its clientele values, emphasize those aspects of the company and get others to do the same on its behalf.**

> **Example**: ***A business can pay for search engine optimization (SEO) services to help increase awareness of the company and make sure that potential clients can find it; this is an advertising expense. Once they find and access the company's website, potential clients may tentatively believe that the firm truly offers superior customer service and that its products are reliable. If this is important to them, they may want to verify the claim by reading statements about the company on blogs, on customer review sites and in the media—in other words, publicity. When advertising and publicity work in tandem, a business increases its chances of success.***

In your opinion, what proportion of your clients became customers as a result of your website or were influenced by content available on the Internet (e.g., paid searches, SEO and the company website)? (n=386)



Base: All respondents. Those who preferred not to answer were excluded from the calculation base.

From potential customer to actual client and back

Understanding a company's strengths and weaknesses is critical to improving conversion rates

> The buying journey can be viewed as a funnel for one-time purchases or as a cycle of repeat purchases. A business must to try to excel during all four steps of the decision-making process to remain relevant and top of mind.

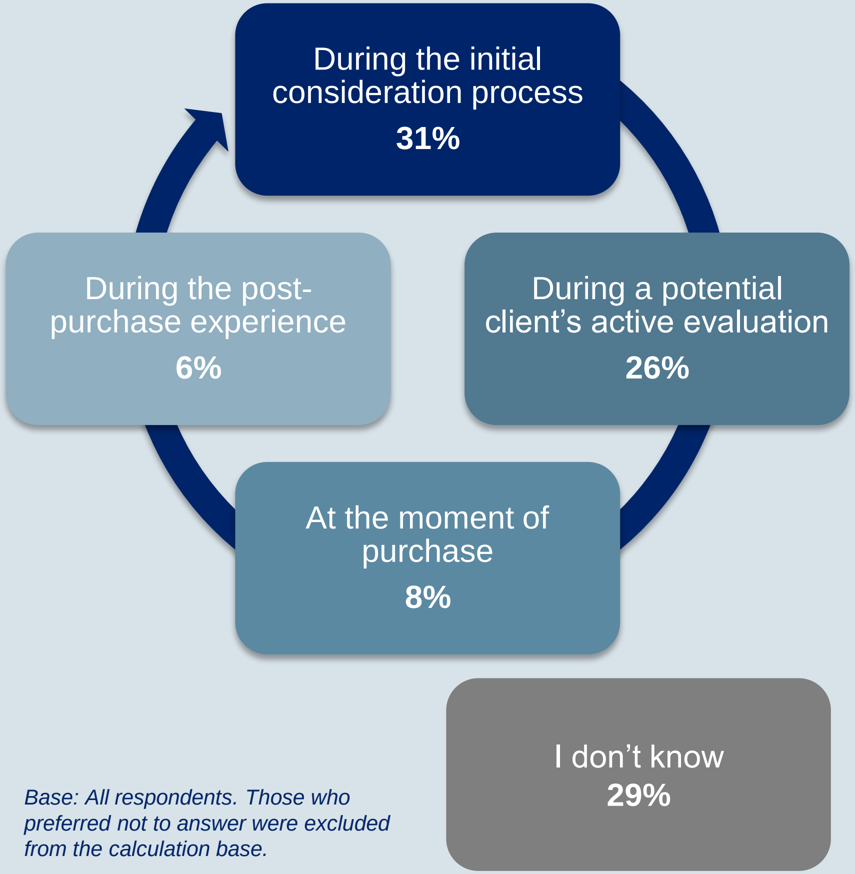
> The **initial consideration process** is the step at which a company should try to raise awareness of, interest in, and knowledge of the company and its offering. Three out of 10 respondents (31%) believe that it is at this moment that they lose potential clients, because people can't find the firm or the company doesn't stand out from the crowd.

– **Companies can use several techniques rooted in advertising and publicity to increase the likelihood of a potential customer moving to the next step. For example, they can improve their SEO positioning; target advertising rather than using a "spray and pray" approach; and leverage media by writing an article about the company and sending it to a local newspaper or trade magazine.**

> The second broad step that a potential client goes through is the **active evaluation** of a company as a supplier or vendor. One quarter of respondents (26%) believe potential clients exclude them during this process. During this step, the company wants to convince potential clients that it is the right choice.

– **To do so, a company must help potential clients match their wants and needs to its offering, and remove as much uncertainty as possible. To do so, the firm can encourage word-of-mouth referrals, invite influencers to blog about the company, have current customers post comments on review sites, enable product comparison on the company's website and provide a clear value-added proposition to differentiate the business.**

Generally speaking, where in the decision-making process do you think you are losing potential customers or repeat clients?
(n=401)



Base: All respondents. Those who preferred not to answer were excluded from the calculation base.

From potential customer to actual client and back (cont'd)

The buying journey is not linear and potential clients may move back and forth

> The **moment of purchase or order** is the target! The good news is that fewer than 1 in 10 respondents (8%) believe that this is the point at which they are losing potential customers. If a company is not converting or closing the sale, it may need to revisit certain aspects of its price, product or promotion.

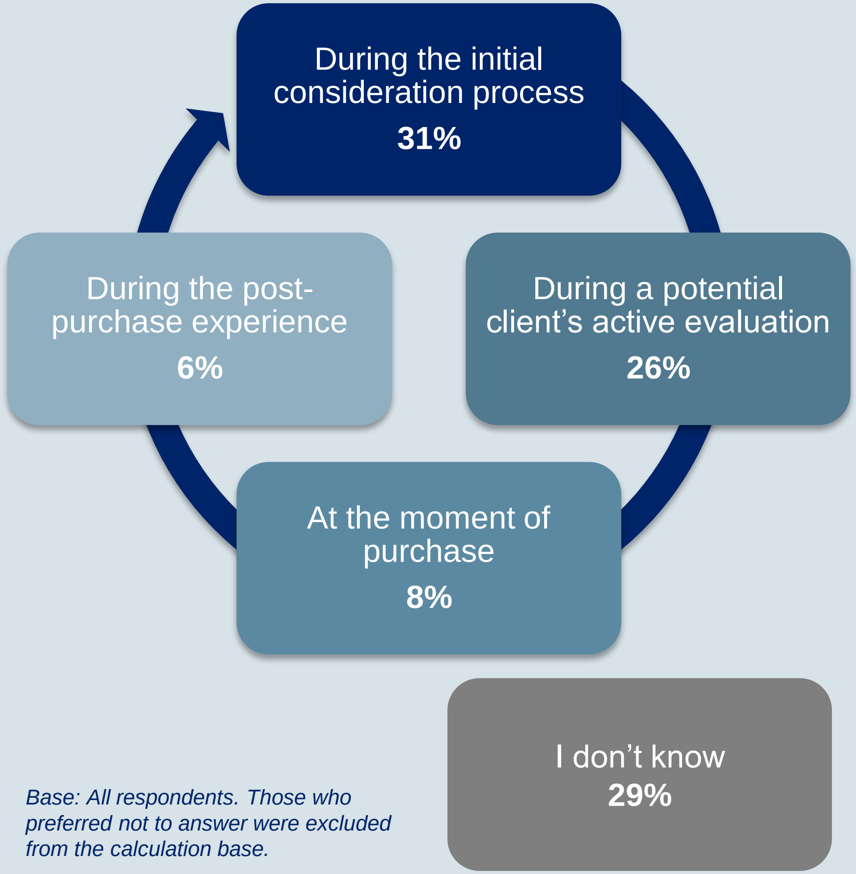
– **For example, competing on price may not be the best strategy, since the client will switch to another vendor the next time if its price is lower. The key is to get potential clients to internalize the company's value proposition and buy into it. Offering credit can help sway certain customers. Free trial offers or money-back guarantees can also play an important part in convincing potential clients. If a company has a list of current clients who are willing to act as ambassadors, it may be a good idea to invite potential customers to reach out to them and discuss the offering and expertise.**

> The **post-purchase experience** is as important as the actual sale. Most businesses operate in an environment where repeat purchases are possible. Repeat purchases and increased share of wallet are often perceived as holy grails. The post-purchase experience is what strengthens a brand and helps build a reputation. Very few respondents believe they are losing their clients at this stage (6%)

– **Once again, it is important for a company to try to leverage word of mouth and overall publicity. Furthermore, it is critical to survey clients on their overall experience with all facets of the business. Gathering information, analyzing it and acting on it is key. It is a good idea to listen to what is being said about the company, product or service, online and offline. Whenever possible, a business should proactively address those issues and complaints.**

> Three out of 10 respondents (29%) were **unable** to pinpoint the moment when they are losing customers.

Generally speaking, where in the decision-making process do you think you are losing potential customers or repeat clients?
(n=401)



Base: All respondents. Those who preferred not to answer were excluded from the calculation base.

Integrated marketing campaign post-mortem

Many business leaders could get a better return on their investment in B2B marketing activities

> Overall, two out of five respondents (41%) said that they **conduct a post-mortem** of their marketing initiatives.

> Intuitively, business leaders may know what works and what does not. However, taking the time to really evaluate all of their marketing initiatives based on pre-set goals, objectives and metrics may yield a different picture.

> Taking the time to gather all of the parties involved in the various marketing initiatives helps in a number of ways:

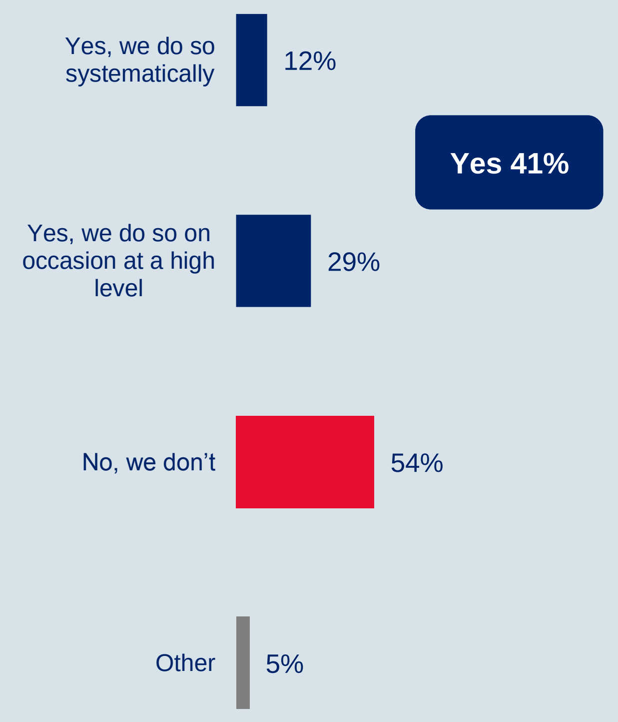
- Showing that a company values the input of the individuals involved in its marketing initiatives can increase overall engagement.
- These individuals may have some insights that have not been captured anywhere else.
- These meetings often lead to new ideas. They can certainly help firms develop best practices and lessons learned that can improve future efforts.

Key take-aways:

> **An annual marketing plan is more than a nice-to-have item. Clearly defining objectives and metrics to measure performance helps companies craft better strategies and tactics to reach pre-set goals.**

> **To continuously improve and increase return on investment, it is invaluable to conduct quarterly or biannual meetings to review actual figures versus forecasts.**

Do you conduct a comprehensive post-mortem of each integrated marketing campaign (i.e., all marketing and sales initiatives) to extract best practices, lessons learned and process improvements? (n=427)



Base: All respondents. Those who preferred not to answer were excluded from the calculation base.

Online activities

Customer online activities

Certain industry sectors are clearly more receptive to ecommerce

> Ecommerce is expected to continue growing in the coming years. The results of this survey clearly show that certain industry sectors are more receptive than others to ecommerce.

> As technology progresses and matures, customers may feel more at ease conducting online transactions. The table on the following page does, however, serve as a good benchmark for understanding the current state of affairs and future potential.

> Here are a few **statistical differences** worth noting:

– Respondents in **professional, scientific and technical services** are more likely than other respondents to conduct online transactions (searching, ordering and paying) pertaining to Internet and technological services.

– Companies with **5 to 20 employees** are significantly more likely to order and pay online for office supplies as well as office furniture and accessories.

– Companies with **20 to 49 employees** are significantly more likely to order logistics and transportation services online.

Base: All respondents. Those who preferred not to answer were excluded from the calculation base. (n=432 to n=438)

Customer online activities (cont'd)

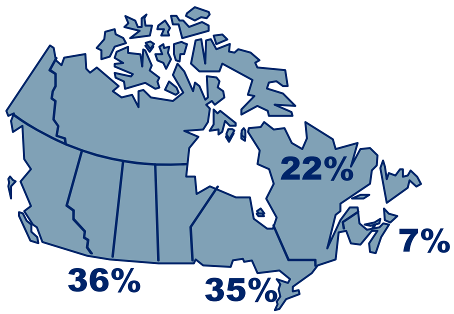
	Search online	Order online	Pay online	Do not search, order or pay online	Not applicable
Technological devices and components: Hardware, software, telephones, etc.	77%	41%	36%	17%	3%
Equipment and machinery	72%	21%	17%	17%	10%
Internet and technological services	67%	31%	31%	20%	5%
Office furniture and accessories	67%	29%	16%	23%	6%
Office supplies	62%	55%	38%	23%	3%
Marketing and printing services	49%	27%	20%	36%	9%
Logistics and transportation	44%	20%	13%	27%	24%
Financial services: Banking and insurance	40%	14%	20%	42%	8%
Raw materials	37%	17%	12%	23%	35%
Professional services: Accounting, legal and consulting services	32%	3%	5%	52%	15%

Base: All respondents. Those who preferred not to answer were excluded from the calculation base. (n=432 to n=438)

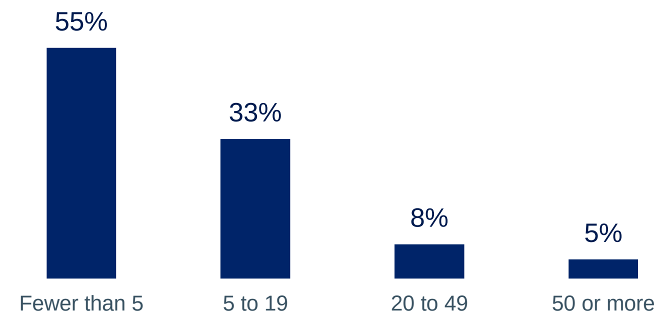
Respondent profile

Respondent profile: Business

n=438

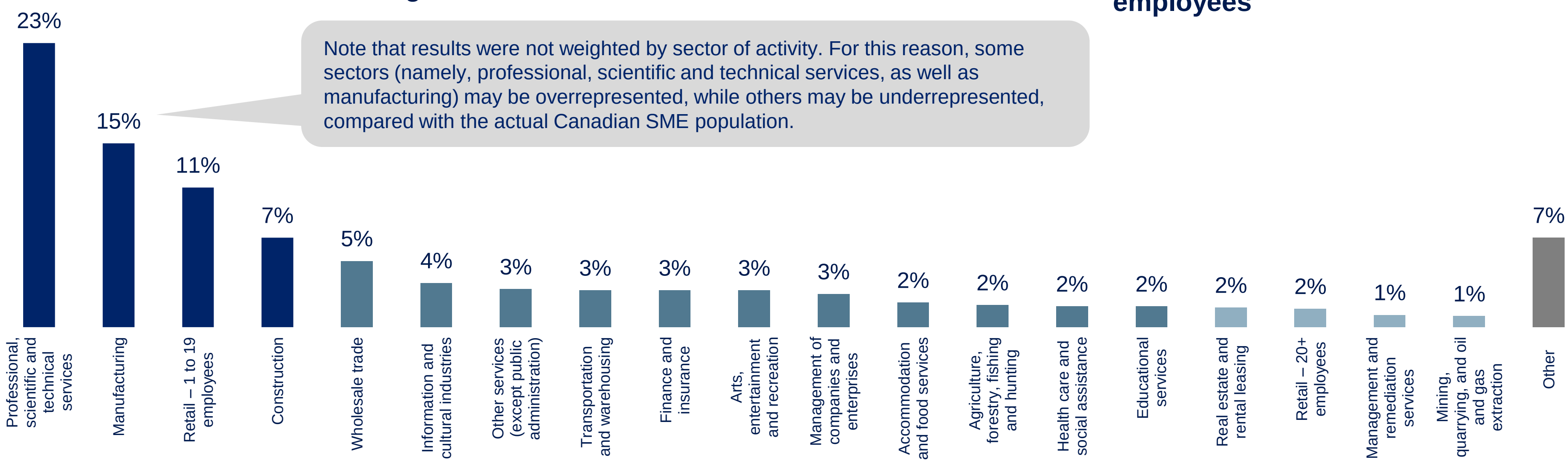


Region



Number of employees

Note that results were not weighted by sector of activity. For this reason, some sectors (namely, professional, scientific and technical services, as well as manufacturing) may be overrepresented, while others may be underrepresented, compared with the actual Canadian SME population.



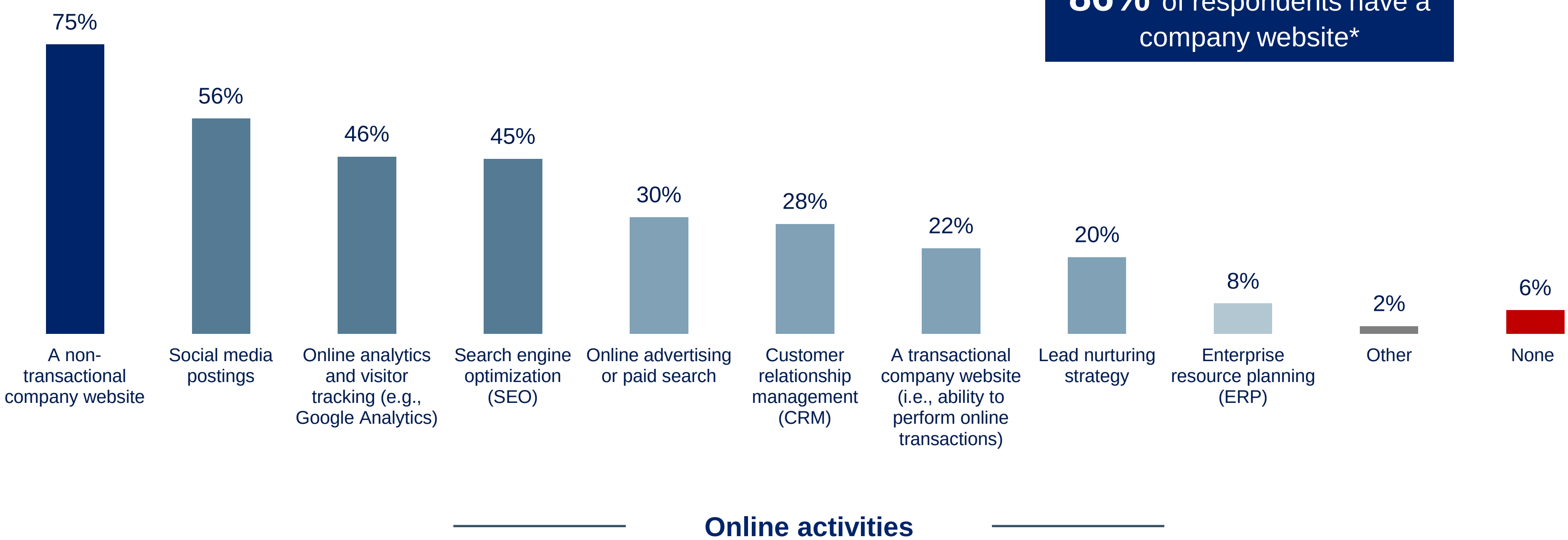
Sector or industry

Base: All respondents. Note that results have been weighted by region and business size.

Respondent profile: Online activities

n=438

86% of respondents have a company website*



** Although one may intuitively think that a business has either a transactional or a non-transactional website, these two aspects may not be mutually exclusive. For example, some businesses have two separate websites: a corporate website and a second website for online transactions. We calculated that 86% of respondents have a website by combining the numbers of people who said their firm has a transactional* **or** *a non-transactional website.*

Base: All respondents.

Appendix

Go-to sources of information

As a business leader, what are your go-to sources when seeking information about a product, service or company?
Multiple answers allowed.

	Total (n=438)	Atlantic Canada (n=47)	Quebec (n=112)	Ontario (n=125)	Western Canada (n=154)
Internet search engines	**87%**	85%	79%	91%	89%
Company websites	**81%**	74%	87%	78%	81%
Business network (for instance, contacts and associations)	**61%**	63%	58%	64%	59%
Employees or business partners	**44%**	46%	42%	42%	46%
Magazines (industry or business-related magazines)	**38%**	36%	34%	32%	47%
Trade shows	**33%**	36%	29%	35%	33%
Friends and family	**23%**	35%	15%	20%	27%
Customer review sites	**22%**	24%	13%	22%	26%
Social media	**20%**	21%	21%	23%	17%
Competitors	**20%**	28%	23%	14%	22%
Newspaper (print or online)	**15%**	17%	**21%**	**7%**	17%
Business directories	**13%**	16%	8%	10%	19%
Blogs	**9%**	8%	12%	11%	7%
Colleges and universities	**4%**	**13%**	7%	4%	**1%**
Other	**4%**	0%	4%	3%	6%

Base: All respondents.
*Numbers in **red** and **green** highlight statistically significant differences between sub-groups.*

Go-to sources of information (cont'd)

As a business leader, what are your go-to sources when seeking information about a product, service or company?
Multiple answers allowed.

	Total (n=438)	Fewer than 5 employees (n=145)	5 to 19 employees (n=171)	20 to 49 employees (n=69)	50 or more employees (n=53)
Internet search engines	**87%**	90%	86%	80%	83%
Company websites	**81%**	79%	82%	87%	82%
Business network (for instance, contacts and associations)	**61%**	59%	63%	59%	66%
Employees or business partners	**44%**	40%	48%	47%	42%
Magazines (industry or business-related magazines)	**38%**	**44%**	**29%**	37%	43%
Trade shows	**33%**	**28%**	34%	46%	**51%**
Friends and family	**23%**	25%	20%	23%	13%
Customer review sites	**22%**	23%	22%	20%	8%
Social media	**20%**	22%	19%	17%	13%
Competitors	**20%**	19%	21%	22%	17%
Newspaper (print or online)	**15%**	15%	12%	16%	24%
Business directories	**13%**	13%	12%	16%	12%
Blogs	**9%**	10%	10%	4%	6%
Colleges and universities	**4%**	4%	3%	3%	8%
Other	**4%**	6%	1%	0%	2%

Base: All respondents.
*Numbers in **red** and **green** highlight statistically significant differences between sub-groups.*

Most influential sources of information

What are the top three most influential sources when seeking information about a product, service or company?
Maximum of three answers allowed.

	Total (n=438)	Atlantic Canada (n=47)	Quebec (n=112)	Ontario (n=125)	Western Canada (n=154)
Company websites	**69%**	62%	76%	67%	68%
Business network (for instance, contacts and associations)	**61%**	59%	56%	58%	66%
Employees or business partners	**36%**	28%	37%	35%	39%
Customer review sites	**25%**	13%	17%	35%	21%
Trade shows	**19%**	23%	18%	21%	17%
Magazines (industry or business-related magazines)	**18%**	11%	22%	16%	19%
Social media and online communities	**18%**	26%	14%	19%	17%
Friends and family	**13%**	**34%**	**10%**	**11%**	**13%**
Competitors	**11%**	15%	12%	11%	11%
Newspaper (print or online)	**4%**	5%	10%	3%	2%
Blogs	**4%**	2%	4%	4%	3%
Colleges and universities	**2%**	4%	3%	0%	2%
Other	**3%**	0%	2%	3%	4%

Base: All respondents.
*Numbers in **red** and **green** highlight statistically significant differences between sub-groups.*

Most influential sources of information (cont'd)

What are the top three most influential sources when seeking information about a product, service or company?
Maximum of three answers allowed.

	Total (n=438)	Fewer than 5 employees (n=145)	5 to 19 employees (n=171)	20 to 49 employees (n=69)	50 or more employees (n=53)
Company websites	**69%**	67%	71%	67%	71%
Business network (for instance, contacts and associations)	**61%**	59%	60%	69%	71%
Employees or business partners	**36%**	**29%**	**44%**	45%	**51%**
Customer review sites	**25%**	27%	24%	15%	15%
Trade shows	**19%**	16%	21%	22%	27%
Magazines (industry or business-related magazines)	**18%**	17%	18%	22%	20%
Social media and online communities	**18%**	21%	14%	14%	16%
Friends and family	**13%**	16%	10%	11%	9%
Competitors	**11%**	10%	14%	9%	8%
Newspaper (print or online)	**4%**	5%	3%	6%	8%
Blogs	**4%**	3%	4%	3%	0%
Colleges and universities	**2%**	3%	1%	0%	2%
Other	**3%**	4%	1%	0%	0%

Base: All respondents.
*Numbers in **red** and **green** highlight statistically significant differences between sub-groups.*

Content available on a company website
Total

	A must	A good addition	A nice-to-have	Of little value
List of products and services offered	86%	12%	2%	0%
Contact information and coordinates	82%	13%	4%	1%
Clear description and potential usage of products and services	78%	19%	3%	0%
Photos	48%	31%	19%	2%
Price list	48%	26%	19%	6%
1-800 number for support or customer service	47%	29%	18%	5%
Overview of the company	45%	35%	17%	3%
Value proposition or differentiation points	30%	38%	23%	9%
Videos, tutorials or how-to, product demonstrations, webinars	23%	51%	23%	4%
Price, value or supplier comparison	23%	45%	24%	7%
Printable marketing material	19%	43%	26%	12%
Testimonials or case studies	16%	42%	30%	12%
Online support and chat	14%	31%	32%	24%
White papers, research reports, e-books, tips, best practices, self-diagnostics, etc.	13%	41%	31%	15%
List of clients and business partners associated with the company	12%	47%	29%	12%
Social media links	12%	19%	31%	38%
Loyalty program: description, benefits, newsletter and registration process	8%	25%	42%	26%
Company awards or recognition and media citations	5%	29%	43%	23%
Community involvement and corporate social responsibility information	5%	24%	41%	30%
Company blog	5%	18%	37%	41%

Base: Respondents who use internet search engines or company websites when they are seeking information about a product, service or company. (n=428)

Content available on a company website
Atlantic Canada

	A must	A good addition	A nice-to-have	Of little value
Contact information and coordinates	85%	8%	5%	2%
List of products and services offered	85%	4%	9%	2%
Clear description and potential usage of products and services	80%	19%	1%	0%
Price list	48%	26%	14%	11%
1-800 number for support or customer service	42%	39%	9%	10%
Photos	38%	37%	25%	0%
Overview of the company	38%	33%	25%	4%
Price, value or supplier comparison	33%	36%	22%	10%
White papers, research reports, e-books, tips, best practices, self-diagnostics, etc.	20%	26%	37%	17%
Loyalty program: description, benefits, newsletter and registration process	17%	24%	30%	29%
Testimonials or case studies	15%	35%	38%	12%
Printable marketing material	14%	43%	28%	15%
Online support and chat	13%	36%	43%	9%
Videos, tutorials or how-to, product demonstrations, webinars	12%	57%	29%	2%
List of clients and business partners associated with the company	12%	46%	26%	16%
Value proposition or differentiation points	11%	54%	27%	8%
Social media links	10%	28%	24%	38%
Community involvement and corporate social responsibility information	10%	13%	36%	41%
Company blog	5%	15%	32%	48%
Company awards or recognition and media citations	4%	39%	39%	19%

Base: Respondents who use internet search engines or company websites when they are seeking information about a product, service or company. (n=45)

Content available on a company website *Quebec*

	A must	A good addition	A nice-to-have	Of little value
List of products and services offered	80%	18%	1%	1%
Clear description and potential usage of products and services	78%	19%	3%	0%
Contact information and coordinates	75%	21%	2%	2%
Photos	55%	34%	11%	0%
1-800 number for support or customer service	50%	29%	17%	4%
Price list	46%	31%	16%	7%
Overview of the company	40%	40%	17%	4%
Value proposition or differentiation points	33%	36%	22%	10%
Videos, tutorials or how-to, product demonstrations, webinars	26%	46%	25%	3%
Printable marketing material	18%	44%	29%	9%
Price, value or supplier comparison	17%	46%	27%	9%
Online support and chat	12%	28%	28%	32%
Social media links	12%	18%	27%	43%
White papers, research reports, e-books, tips, best practices, self-diagnostics, etc.	10%	43%	22%	24%
List of clients and business partners associated with the company	9%	56%	22%	12%
Testimonials or case studies	9%	45%	32%	14%
Company awards or recognition and media citations	5%	38%	40%	18%
Loyalty program: description, benefits, newsletter and registration process	5%	36%	32%	27%
Community involvement and corporate social responsibility information	5%	16%	48%	32%
Company blog	2%	15%	36%	47%

Base: Respondents who use internet search engines or company websites when they are seeking information about a product, service or company. (n=108)

Content available on a company website
Ontario

	A must	A good addition	A nice-to-have	Of little value
List of products and services offered	87%	11%	2%	0%
Contact information and coordinates	84%	13%	4%	0%
Clear description and potential usage of products and services	81%	16%	3%	0%
Price list	48%	25%	21%	6%
Photos	46%	24%	29%	1%
Overview of the company	45%	29%	25%	1%
1-800 number for support or customer service	45%	28%	22%	6%
Value proposition or differentiation points	30%	41%	22%	6%
Videos, tutorials or how-to, product demonstrations, webinars	23%	50%	22%	6%
Printable marketing material	21%	43%	23%	13%
Price, value or supplier comparison	19%	50%	22%	9%
Testimonials or case studies	16%	44%	30%	11%
List of clients and business partners associated with the company	15%	49%	28%	9%
White papers, research reports, e-books, tips, best practices, self-diagnostics, etc.	14%	47%	32%	8%
Social media links	13%	19%	30%	38%
Online support and chat	12%	36%	29%	24%
Loyalty program: description, benefits, newsletter and registration process	9%	21%	48%	23%
Community involvement and corporate social responsibility information	6%	25%	45%	24%
Company blog	5%	21%	35%	39%
Company awards or recognition and media citations	4%	21%	46%	29%

Base: Respondents who use internet search engines or company websites when they are seeking information about a product, service or company. (n=123)

Content available on a company website
Western Canada

	A must	A good addition	A nice-to-have	Of little value
List of products and services offered	90%	10%	1%	0%
Contact information and coordinates	83%	9%	7%	1%
Clear description and potential usage of products and services	75%	21%	4%	0%
Price list	51%	25%	20%	5%
Overview of the company	49%	39%	8%	5%
Photos	48%	35%	12%	4%
1-800 number for support or customer service	48%	29%	18%	5%
Value proposition or differentiation points	32%	32%	25%	12%
Price, value or supplier comparison	29%	42%	25%	5%
Videos, tutorials or how-to, product demonstrations, webinars	22%	54%	22%	2%
Printable marketing material	20%	42%	27%	13%
Testimonials or case studies	20%	39%	28%	13%
Online support and chat	18%	26%	34%	21%
White papers, research reports, e-books, tips, best practices, self-diagnostics, etc.	14%	38%	34%	15%
List of clients and business partners associated with the company	12%	39%	35%	14%
Social media links	11%	18%	35%	36%
Loyalty program: description, benefits, newsletter and registration process	6%	24%	43%	27%
Company blog	6%	17%	40%	37%
Company awards or recognition and media citations	5%	29%	43%	23%
Community involvement and corporate social responsibility information	4%	28%	34%	34%

Base: Respondents who use internet search engines or company websites when they are seeking information about a product, service or company. (n=152)

Content available on a company website
Fewer than 5 employees

	A must	A good addition	A nice-to-have	Of little value
List of products and services offered	86%	13%	2%	0%
Contact information and coordinates	80%	13%	6%	1%
Clear description and potential usage of products and services	78%	20%	3%	0%
Price list	56%	21%	19%	4%
Photos	47%	31%	19%	3%
1-800 number for support or customer service	44%	32%	19%	5%
Overview of the company	43%	36%	19%	3%
Value proposition or differentiation points	30%	36%	26%	8%
Price, value or supplier comparison	26%	41%	25%	7%
Videos, tutorials or how-to, product demonstrations, webinars	23%	51%	24%	2%
Online support and chat	18%	30%	31%	22%
Testimonials or case studies	17%	41%	31%	11%
Printable marketing material	16%	46%	29%	9%
White papers, research reports, e-books, tips, best practices, self-diagnostics, etc.	15%	43%	28%	14%
List of clients and business partners associated with the company	14%	45%	27%	14%
Social media links	13%	18%	32%	36%
Loyalty program: description, benefits, newsletter and registration process	11%	21%	43%	25%
Community involvement and corporate social responsibility information	6%	24%	41%	29%
Company awards or recognition and media citations	5%	29%	47%	19%
Company blog	4%	21%	40%	35%

Base: Respondents who use internet search engines or company websites when they are seeking information about a product, service or company. (n=143)

Content available on a company website
5 to 19 employees

	A must	A good addition	A nice-to-have	Of little value
List of products and services offered	88%	10%	1%	1%
Contact information and coordinates	84%	13%	2%	1%
Clear description and potential usage of products and services	81%	15%	4%	0%
Photos	52%	31%	17%	1%
1-800 number for support or customer service	48%	26%	20%	6%
Overview of the company	45%	36%	15%	4%
Price list	40%	34%	17%	10%
Value proposition or differentiation points	30%	39%	21%	10%
Videos, tutorials or how-to, product demonstrations, webinars	25%	49%	22%	4%
Printable marketing material	24%	38%	22%	17%
Price, value or supplier comparison	18%	53%	21%	8%
Testimonials or case studies	16%	39%	31%	14%
List of clients and business partners associated with the company	11%	48%	31%	10%
White papers, research reports, e-books, tips, best practices, self-diagnostics, etc.	11%	42%	34%	13%
Online support and chat	10%	34%	32%	24%
Social media links	10%	20%	28%	42%
Company blog	6%	14%	32%	48%
Community involvement and corporate social responsibility information	4%	23%	39%	35%
Loyalty program: description, benefits, newsletter and registration process	3%	32%	39%	26%
Company awards or recognition and media citations	3%	26%	37%	33%

Base: Respondents who use internet search engines or company websites when they are seeking information about a product, service or company. (n=169)

Content available on a company website
20 to 49 employees

	A must	A good addition	A nice-to-have	Of little value
Contact information and coordinates	87%	13%	0%	0%
List of products and services offered	83%	13%	4%	0%
Clear description and potential usage of products and services	72%	22%	4%	2%
1-800 number for support or customer service	56%	29%	10%	5%
Overview of the company	53%	32%	13%	3%
Photos	40%	34%	24%	2%
Price list	38%	32%	22%	8%
Value proposition or differentiation points	30%	36%	22%	13%
Printable marketing material	19%	45%	23%	13%
Price, value or supplier comparison	19%	43%	33%	6%
Videos, tutorials or how-to, product demonstrations, webinars	14%	56%	22%	9%
Online support and chat	13%	29%	26%	32%
White papers, research reports, e-books, tips, best practices, self-diagnostics, etc.	12%	30%	36%	22%
Testimonials or case studies	10%	51%	26%	14%
Social media links	9%	22%	37%	32%
List of clients and business partners associated with the company	8%	54%	27%	11%
Community involvement and corporate social responsibility information	8%	23%	41%	28%
Loyalty program: description, benefits, newsletter and registration process	7%	21%	46%	26%
Company awards or recognition and media citations	6%	35%	39%	20%
Company blog	3%	15%	36%	47%

Base: Respondents who use internet search engines or company websites when they are seeking information about a product, service or company. (n=466)

Content available on a company website
50 or more employees

	A must	A good addition	A nice-to-have	Of little value
List of products and services offered	86%	14%	0%	0%
Contact information and coordinates	77%	16%	8%	0%
Clear description and potential usage of products and services	74%	24%	2%	0%
Photos	49%	29%	18%	4%
1-800 number for support or customer service	54%	27%	13%	6%
Overview of the company	51%	27%	16%	6%
Value proposition or differentiation points	37%	44%	15%	4%
Price list	34%	29%	35%	2%
Price, value or supplier comparison	27%	40%	22%	11%
Printable marketing material	27%	31%	27%	16%
List of clients and business partners associated with the company	16%	41%	39%	4%
Testimonials or case studies	14%	49%	28%	9%
Videos, tutorials or how-to, product demonstrations, webinars	12%	55%	26%	6%
White papers, research reports, e-books, tips, best practices, self-diagnostics, etc.	9%	40%	27%	24%
Social media links	8%	20%	28%	44%
Company awards or recognition and media citations	6%	38%	40%	16%
Online support and chat	6%	27%	43%	24%
Loyalty program: description, benefits, newsletter and registration process	3%	39%	39%	20%
Community involvement and corporate social responsibility information	0%	24%	53%	23%
Company blog	0%	21%	35%	44%

Base: Respondents who use internet search engines or company websites when they are seeking information about a product, service or company. (n=50)

Online searches using a smartphone or tablet

When seeking information about a product, service or company, what percentage of the time do you conduct an online search using a smartphone or tablet?

	Total (n=436)	Atlantic Canada (n=46)	Quebec (n=112)	Ontario (n=124)	Western Canada (n=154)
More than 75%	**3%**	1%	7%	2%	3%
51% to 75%	**8%**	14%	7%	10%	5%
26% to 50%	**22%**	**37%**	**28%**	**14%**	22%
1% to 25%	**42%**	26%	33%	49%	42%
0%	**26%**	23%	25%	25%	27%

	Total (n=436)	Fewer than 5 employees (n=145)	5 to 19 employees (n=171)	20 to 49 employees (n=68)	50 or more employees (n=52)
More than 75%	**3%**	4%	1%	5%	10%
51% to 75%	**8%**	7%	10%	8%	4%
26% to 50%	**22%**	18%	26%	24%	25%
1% to 25%	**42%**	42%	41%	43%	43%
0%	**26%**	29%	22%	21%	18%

*Base: All respondents. Those who preferred not to answer were excluded from the calculation base. Due to rounding, the sum of the results may not equal 100%. Numbers in **red** and **green** highlight statistically significant differences between sub-groups.*

Additional valued input

When interacting with a dynamic source such as individuals, customer review sites or online communities, what type of information is most beneficial to help you along in your decision-making process? *Multiple answers allowed.*

	Total (n=429)	Atlantic Canada (n=45)	Quebec (n=110)	Ontario (n=122)	Western Canada (n=152)
Reliability of a product, service or company	**78%**	88%	77%	75%	79%
Excellence of the customer service (pre- and post-purchase)	**73%**	75%	75%	65%	80%
Ability of the company's employees to diagnose, understand or resolve an issue	**67%**	73%	57%	66%	74%
Prior experience with a product, service or company	**63%**	73%	54%	64%	65%
Willingness to do business again with a company (repeat)	**53%**	**69%**	**36%**	54%	**60%**
Price-related information	**48%**	50%	51%	45%	49%
Contact information	**44%**	**60%**	**27%**	46%	**50%**
Willingness to refer the company, product or service	**42%**	44%	33%	42%	47%
Cases when the product, service or company is a good choice and when it is not	**32%**	34%	33%	30%	32%
Other	**2%**	0%	3%	1%	3%

Base: All respondents. Those who preferred not to answer were excluded from the calculation base.
*Numbers in **red** and **green** highlight statistically significant differences between sub-groups.*

Additional valued input (cont'd)

When interacting with a dynamic source such as individuals, customer review sites or online communities, what type of information is most beneficial to help you along in your decision-making process? *Multiple answers allowed.*

	Total (n=429)	Fewer than 5 employees (n=144)	5 to 19 employees (n=167)	20 to 49 employees (n=67)	50 or more employees (n=51)
Reliability of a product, service or company	**78%**	**81%**	73%	80%	**63%**
Excellence of the customer service (pre- and post-purchase)	**73%**	73%	73%	78%	70%
Ability of the company's employees to diagnose, understand or resolve an issue	**67%**	68%	68%	63%	56%
Prior experience with a product, service or company	**63%**	64%	62%	63%	57%
Willingness to do business again with a company (repeat)	**53%**	57%	49%	55%	44%
Price-related information	**48%**	50%	47%	44%	39%
Contact information	**44%**	48%	42%	38%	32%
Willingness to refer the company, product or service	**42%**	45%	44%	27%	26%
Cases when the product, service or company is a good choice and when it is not	**32%**	33%	30%	22%	43%
Other	**2%**	2%	2%	0%	4%

Base: All respondents. Those who preferred not to answer were excluded from the calculation base.
Numbers in ***red*** *and* ***green*** *highlight statistically significant differences between sub-groups.*

Decision-making process in the buying journey

On average, what percentage of the purchase decision-making process have you completed prior to contacting a supplier sales representative directly for a given product or service?

	Total (n=411)	Atlantic Canada (n=42)	Quebec (n=101)	Ontario (n=119)	Western Canada (n=149)
More than 75%	**22%**	39%	19%	24%	18%
51% to 75%	**30%**	27%	30%	29%	31%
26% to 50%	**35%**	23%	38%	34%	37%
1% to 25%	**11%**	10%	12%	10%	12%
0%	**2%**	0%	0%	3%	3%

	Total (n=411)	Fewer than 5 employees (n=136)	5 to 19 employees (n=161)	20 to 49 employees (n=64)	50 or more employees (n=50)
More than 75%	**22%**	20%	26%	19%	22%
51% to 75%	**30%**	32%	27%	23%	31%
26% to 50%	**35%**	35%	35%	44%	28%
1% to 25%	**11%**	10%	12%	14%	14%
0%	**2%**	3%	1%	0%	4%

Base: All respondents. Those who preferred not to answer were excluded from the calculation base.
Due to rounding, the sum of the results may not equal 100%.
*Numbers in **red** and **green** highlight statistically significant differences between sub-groups.*

Importance of gut feeling in the decision-making process

How important is gut feeling in your decision-making process?

	Total (n=438)	Atlantic Canada (n=47)	Quebec (n=112)	Ontario (n=125)	Western Canada (n=154)
Very important	**32%**	26%	31%	36%	30%
Somewhat important	**52%**	53%	49%	50%	55%
Neither important, nor unimportant	**12%**	16%	15%	9%	13%
Somewhat unimportant	**2%**	4%	4%	1%	1%
Not important at all	**2%**	1%	2%	3%	2%

	Total (n=438)	Fewer than 5 employees (n=145)	5 to 19 employees (n=171)	20 to 49 employees (n=69)	50 or more employees (n=53)
Very important	32%	33%	34%	29%	23%
Somewhat important	52%	52%	49%	54%	63%
Neither important, nor unimportant	12%	12%	13%	10%	10%
Somewhat unimportant	2%	1%	2%	5%	2%
Not important at all	2%	2%	3%	1%	2%

Base: All respondents.
Due to rounding, the sum of the results may not equal 100%.

Risk associated with a purchase decision

To what extent do you agree with the following statement?
"The higher the risk associated with a purchase decision, the more information I seek prior to contacting a supplier sales representative directly."

	Total (n=438)	Atlantic Canada (n=47)	Quebec (n=112)	Ontario (n=125)	Western Canada (n=154)
Totally agree	**69%**	74%	59%	70%	72%
Somewhat agree	**24%**	26%	25%	24%	24%
Neither agree, nor disagree	**5%**	0%	**13%**	4%	**3%**
Somewhat disagree	**1%**	0%	2%	0%	0%
Disagree	**1%**	0%	2%	2%	1%

	Total (n=438)	Fewer than 5 employees (n=145)	5 to 19 employees (n=171)	20 to 49 employees (n=69)	50 or more employees (n=53)
Totally agree	**69%**	68%	71%	70%	63%
Somewhat agree	**24%**	26%	23%	20%	26%
Neither agree, nor disagree	**5%**	5%	4%	7%	11%
Somewhat disagree	**1%**	1%	1%	2%	0%
Disagree	**1%**	1%	1%	2%	0%

Base: All respondents. Due to rounding, the sum of the results may not equal 100%.
*Numbers in **red** and **green** highlight statistically significant differences between sub-groups.*

Face to face meeting with a supplier

Which of the following scenarios do you tend to prefer when meeting face to face with a supplier sales representative?

	Total (n=437)	Atlantic Canada (n=47)	Quebec (n=111)	Ontario (n=125)	Western Canada (n=154)
I prefer meeting the sales representative **in our offices**, store or plant	**39%**	46%	49%	36%	34%
I prefer meeting the sales representative **in their offices**, store or plant	**25%**	30%	18%	24%	28%
I prefer meeting the sales representative **on neutral ground**	**5%**	0%	4%	6%	5%
It makes no difference	**32%**	25%	29%	34%	33%

	Total (n=437)	Fewer than 5 employees (n=145)	5 to 19 employees (n=170)	20 to 49 employees (n=69)	50 or more employees (n=53)
I prefer meeting the sales representative **in our offices**, store or plant	**39%**	**29%**	**47%**	**60%**	**59%**
I prefer meeting the sales representative **in their offices**, store or plant	**25%**	**31%**	18%	**13%**	**11%**
I prefer meeting the sales representative **on neutral ground**	**5%**	6%	5%	3%	0%
It makes no difference	**32%**	34%	30%	24%	30%

Base: All respondents. Those who preferred not to answer were excluded from the calculation base.
Due to rounding, the sum of the results may not equal 100%.
*Numbers in **red** and **green** highlight statistically significant differences between sub-groups.*

Group decision

Generally speaking, in your company, what percentage of the time is a purchase decision made by a group decision?

	Total (n=438)	Atlantic Canada (n=47)	Quebec (n=112)	Ontario (n=125)	Western Canada (n=154)
More than 75%	**9%**	6%	8%	10%	9%
51% to 75%	**14%**	8%	21%	14%	10%
26% to 50%	**23%**	19%	22%	27%	22%
1% to 25%	**33%**	41%	30%	30%	37%
0%	**21%**	26%	19%	20%	23%

	Total (n=438)	Fewer than 5 employees (n=145)	5 to 19 employees (n=171)	20 to 49 employees (n=69)	50 or more employees (n=53)
More than 75%	**9%**	9%	7%	12%	15%
51% to 75%	**14%**	12%	15%	16%	25%
26% to 50%	**23%**	19%	27%	31%	35%
1% to 25%	**33%**	30%	40%	39%	23%
0%	**21%**	**31%**	**12%**	**2%**	**1%**

Base: All respondents. Due to rounding, the sum of the results may not equal 100%.
*Numbers in **red** and **green** highlight statistically significant differences between sub-groups.*

Brand / name of supplier as a decision factor

For what types of products or services does the brand/name of the supplier represent a decision factor for you?
Multiple answers allowed.

	Total (n=431)	Atlantic Canada (n=47)	Quebec (n=112)	Ontario (n=121)	Western Canada (n=151)
Technological devices and components: hardware, software, telephones, etc.	**59%**	58%	61%	59%	58%
Financial services: banking and insurance	**57%**	43%	54%	58%	62%
Equipment and machinery	**57%**	63%	55%	58%	57%
Professional services: accounting, legal, and consulting services	**32%**	41%	32%	28%	34%
Internet and technological services	**30%**	31%	32%	28%	30%
Logistics and transportation	**22%**	21%	27%	17%	24%
Fuel	**18%**	12%	11%	23%	19%
Office supplies	**16%**	14%	16%	18%	16%
Raw materials	**14%**	12%	23%	11%	12%
Marketing services	**12%**	15%	14%	14%	8%
Office furniture and accessories	**9%**	12%	10%	8%	10%
Other	**2%**	0%	0%	1%	5%
The brand is never a decision factor for me	**13%**	12%	14%	13%	13%

Base: All respondents. Those who preferred not to answer were excluded from the calculation base.

Brand / name of supplier as a decision factor (cont'd)

For what types of products or services does the brand/name of the supplier represent a decision factor for you?
Multiple answers allowed.

	Total (n=431)	Fewer than 5 employees (n=144)	5 to 19 employees (n=168)	20 to 49 employees (n=67)	50 or more employees (n=52)
Technological devices and components: hardware, software, telephones, etc.	**59%**	61%	57%	56%	62%
Financial services: banking and insurance	**57%**	58%	56%	57%	65%
Equipment and machinery	**57%**	52%	61%	71%	70%
Professional services: accounting, legal, and consulting services	**32%**	34%	**25%**	35%	**48%**
Internet and technological services	**30%**	33%	26%	21%	29%
Logistics and transportation	**22%**	25%	16%	25%	29%
Fuel	**18%**	19%	16%	23%	20%
Office supplies	**16%**	20%	14%	9%	8%
Raw materials	**14%**	13%	13%	24%	23%
Marketing services	**12%**	14%	**9%**	8%	**24%**
Office furniture and accessories	**9%**	9%	10%	5%	8%
Other	**2%**	3%	1%	2%	4%
The brand is never a decision factor for me	**13%**	13%	16%	10%	2%

Base: All respondents. Those who preferred not to answer were excluded from the calculation base.
*Numbers in **red** and **green** highlight statistically significant differences between sub-groups.*

Content development – Company's website

Who develops content to be integrated into your company's website? *Multiple answers allowed.*

	Total (n=396)	Atlantic Canada (n=44)	Quebec (n=96)	Ontario (n=116)	Western Canada (n=140)
Company owner or partners	**71%**	72%	74%	68%	72%
Designated employee(s)	**37%**	32%	36%	35%	41%
External consultant(s) or firm	**33%**	15%	46%	25%	37%
Contracted or part-time worker(s) hired specially for this	**15%**	11%	11%	20%	14%
All employees	**10%**	4%	7%	12%	12%
Marketing and sales department employees only	**8%**	4%	9%	7%	9%
Other	**1%**	10%	0%	0%	2%

	Total (n=396)	Fewer than 5 employees (n=123)	5 to 19 employees (n=157)	20 to 49 employees (n=64)	50 or more employees (n=52)
Company owner or partners	**71%**	76%	70%	56%	46%
Designated employee(s)	**37%**	26%	43%	67%	68%
External consultant(s) or firm	**33%**	31%	33%	45%	36%
Contracted or part-time worker(s) hired specially for this	**15%**	16%	14%	18%	19%
All employees	**10%**	8%	14%	7%	8%
Marketing and sales department employees only	**8%**	6%	9%	14%	11%
Other	**1%**	1%	1%	2%	2%

*Base: Respondents who have a company website. Those who preferred not to answer were excluded from the calculation base. Numbers in **red** and **green** highlight statistically significant differences between sub-groups.*

Site management – Company's website

Who manages your company's website? *Multiple answers allowed.*

	Total (n=394)	Atlantic Canada (n=44)	Quebec (n=96)	Ontario (n=114)	Western Canada (n=140)
Company owner or partners	**58%**	53%	52%	61%	59%
Designated employee(s)	**36%**	30%	35%	36%	39%
External consultant(s) or firm	**29%**	23%	37%	22%	33%
Contracted or part-time worker(s) hired specially for this	**14%**	8%	15%	17%	13%
Marketing and sales department employees only	**5%**	1%	3%	6%	6%
All employees	**1%**	2%	1%	1%	1%
Other	**1%**	**9%**	0%	**1%**	0%

	Total (n=394)	Fewer than 5 employees (n=122)	5 to 19 employees (n=157)	20 to 49 employees (n=63)	50 or more employees (n=52)
Company owner or partners	**58%**	**68%**	**51%**	**45%**	**29%**
Designated employee(s)	**36%**	**25%**	**43%**	**54%**	**78%**
External consultant(s) or firm	**29%**	28%	30%	35%	31%
Contracted or part-time worker(s) hired specially for this	**14%**	18%	10%	9%	11%
Marketing and sales department employees only	**5%**	3%	7%	9%	5%
All employees	**1%**	0%	3%	0%	2%
Other	**1%**	1%	1%	3%	2%

Base: Respondents who have a company website. Those who preferred not to answer were excluded from the calculation base. Numbers in ***red*** *and* ***green*** *highlight statistically significant differences between sub-groups.*

Content development – Social media

Who develops content to be integrated into your social media postings? *Multiple answers allowed.*

	Total (n=233)	Atlantic Canada *(n=27*)*	Quebec (n=47)	Ontario (n=67)	Western Canada (n=92)
Company owner or partners	**70%**	*69%*	79%	66%	69%
Designated employee(s)	**37%**	*36%*	37%	33%	40%
External consultant(s) or firm	**15%**	*13%*	24%	9%	17%
All employees	**12%**	*11%*	7%	13%	13%
Marketing and sales department employees only	**9%**	*11%*	4%	10%	9%
Contracted or part-time worker(s) hired specially for this	**6%**	*4%*	4%	7%	6%
Other	**1%**	*10%*	3%	0%	0%

	Total (n=233)	Fewer than 5 employees (n=80)	5 to 19 employees (n=96)	20 to 49 employees (n=31)	50 or more employees *(n=26*)*
Company owner or partners	**70%**	**80%**	**61%**	**52%**	*36%*
Designated employee(s)	**37%**	**25%**	**44%**	**69%**	*84%*
External consultant(s) or firm	**15%**	13%	16%	19%	*27%*
All employees	**12%**	10%	15%	10%	*4%*
Marketing and sales department employees only	**9%**	6%	13%	9%	*14%*
Contracted or part-time worker(s) hired specially for this	**6%**	5%	6%	7%	*12%*
Other	**1%**	2%	0%	2%	*0%*

*Base: Respondents who use social media. Those who preferred not to answer were excluded from the calculation base. Numbers in **red** and **green** highlight statistically significant differences between sub-groups.*
** Due to a small number of respondents, numbers in italic should be interpreted with caution.*

Account management – Social media

Who manages your social media account and postings? *Multiple answers allowed.*

	Total (n=233)	Atlantic Canada *(n=27*)*	Quebec (n=47)	Ontario (n=67)	Western Canada (n=92)
Company owner or partners	**64%**	*55%*	71%	63%	62%
Designated employee(s)	**41%**	*34%*	38%	39%	44%
External consultant(s) or firm	**12%**	*11%*	14%	7%	16%
Marketing and sales department employees only	**9%**	*9%*	4%	9%	11%
All employees	**6%**	*4%*	3%	8%	6%
Contracted or part-time worker(s) hired specially for this	**3%**	*0%*	6%	2%	3%
Other	**0%**	*2%*	0%	0%	0%

	Total (n=233)	Fewer than 5 employees (n=80)	5 to 19 employees (n=96)	20 to 49 employees (n=31)	50 or more employees *(n=26*)*
Company owner or partners	**64%**	**76%**	**52%**	**44%**	*24%*
Designated employee(s)	**41%**	**28%**	**49%**	**76%**	*91%*
External consultant(s) or firm	**12%**	10%	15%	15%	*7%*
Marketing and sales department employees only	**9%**	8%	10%	9%	*11%*
All employees	**6%**	7%	6%	0%	*9%*
Contracted or part-time worker(s) hired specially for this	**3%**	2%	3%	4%	*8%*
Other	**0%**	0%	0%	2%	*0%*

*Base: Respondents who use social media. Those who preferred not to answer were excluded from the calculation base. Numbers in **red** and **green** highlight statistically significant differences between sub-groups.*
** Due to a small number of respondents, numbers in italic should be interpreted with caution.*

Online tracking

Do you regularly analyze the type of visitors who access your website and the content viewed and time spent?

	Total (n=392)	Atlantic Canada (n=43)	Quebec (n=95)	Ontario (n=116)	Western Canada (n=138)
Yes, we do so regularly	**22%**	17%	25%	19%	26%
Yes, we do so occasionally	**31%**	24%	31%	30%	33%
No, not for the moment but we plan to	**26%**	22%	32%	31%	19%
No, we don't know how	**10%**	22%	9%	8%	10%
No, there is not much information there for us	**9%**	14%	3%	11%	10%
Other	**1%**	0%	1%	1%	2%

	Total (n=392)	Fewer than 5 employees (n=123)	5 to 19 employees (n=154)	20 to 49 employees (n=63)	50 or more employees (n=52)
Yes, we do so regularly	**22%**	22%	24%	16%	27%
Yes, we do so occasionally	**31%**	28%	33%	43%	26%
No, not for the moment but we plan to	**26%**	30%	22%	24%	26%
No, we don't know how	**10%**	11%	9%	8%	16%
No, there is not much information there for us	**9%**	9%	11%	9%	5%
Other	**1%**	2%	1%	0%	0%

*Base: Respondents who have a company website. Those who preferred not to answer were excluded from the calculation base. Due to rounding, the sum of the results may not equal 100%. Numbers in **red** and **green** highlight statistically significant differences between sub-groups.*

Influence of online presence

In your opinion, what proportion of your clientele became a customer as a result of the Internet or was influenced by content available on the Internet (i.e. paid searches, SEO, and company website)?

	Total (n=386)	Atlantic Canada (n=39)	Quebec (n=97)	Ontario (n=110)	Western Canada (n=140)
More than 75%	**10%**	2%	8%	11%	13%
51% to 75%	**10%**	12%	13%	7%	10%
26% to 50%	**18%**	21%	13%	19%	20%
1% to 25%	**53%**	57%	55%	53%	52%
None 0%	**9%**	8%	11%	10%	6%

	Total (n=386)	Fewer than 5 employees (n=126)	5 to 19 employees (n=152)	20 to 49 employees (n=63)	50 or more employees (n=45)
More than 75%	**10%**	12%	10%	0%	10%
51% to 75%	**10%**	12%	7%	9%	3%
26% to 50%	**18%**	17%	21%	21%	11%
1% to 25%	**53%**	48%	56%	63%	75%
None 0%	**9%**	11%	6%	7%	1%

Base: All respondents. Those who preferred not to answer were excluded from the calculation base.
Due to rounding, the sum of the results may not equal 100%.
*Numbers in **red** and **green** highlight statistically significant differences between sub-groups.*

From potential customer to actual client and back

Generally speaking, where in the decision-making process do you think you are losing potential customers or repeat clients?

	Total (n=401)	Atlantic Canada (n=41)	Quebec (n=101)	Ontario (n=115)	Western Canada (n=144)
During the initial consideration process of potential suppliers	**31%**	33%	25%	33%	34%
During a potential client's active evaluation of our company as a potential supplier	**26%**	13%	29%	32%	20%
At the moment of purchase	**8%**	12%	**17%**	8%	**3%**
Post-purchase experience	**6%**	2%	1%	5%	9%
I don't know	**29%**	40%	29%	23%	34%

	Total (n=401)	Fewer than 5 employees (n=129)	5 to 19 employees (n=160)	20 to 49 employees (n=64)	50 or more employees (n=48)
During the initial consideration process of potential suppliers	**31%**	30%	35%	28%	27%
During a potential client's active evaluation of our company as a potential supplier	**26%**	28%	20%	30%	31%
At the moment of purchase	**8%**	9%	7%	11%	12%
Post-purchase experience	**6%**	3%	8%	11%	7%
I don't know	**29%**	31%	30%	20%	22%

Base: All respondents. Those who preferred not to answer were excluded from the calculation base.
Due to rounding, the sum of the results may not equal 100%.
*Numbers in **red** and **green** highlight statistically significant differences between sub-groups.*

Integrated marketing campaign post-mortem

Do you conduct a comprehensive post-mortem of your integrated advertising campaign (i.e. all marketing and sales initiatives) to extract best practices, lessons learned and process improvements?

	Total (n=427)	Atlantic Canada (n=45)	Quebec (n=109)	Ontario (n=122)	Western Canada (n=151)
Yes, we do so systematically	**12%**	5%	13%	13%	12%
Yes, we do so on occasion at high level	**29%**	43%	26%	24%	33%
No, we don't	**54%**	48%	53%	60%	49%
Other	**5%**	4%	8%	2%	6%

	Total (n=427)	Fewer than 5 employees (n=139)	5 to 19 employees (n=168)	20 to 49 employees (n=68)	50 or more employees (n=52)
Yes, we do so systematically	**12%**	12%	14%	9%	5%
Yes, we do so on occasion at high level	**29%**	28%	28%	36%	33%
No, we don't	**54%**	54%	52%	54%	58%
Other	**5%**	6%	6%	2%	4%

Base: All respondents. Those who preferred not to answer were excluded from the calculation base.
Due to rounding, the sum of the results may not equal 100%.
*Numbers in **red** and **green** highlight statistically significant differences between sub-groups.*

Customer online activities
Total

For each of the following elements, please indicate if you search for it online, order it online, and/or pay for it online?
Multiple answers allowed.

	Search Online	Order Online	Pay Online	No, We Do Not Search, Order or Pay for it Online	Not applicable
Technological devices and components: hardware, software, telephones, etc.	77%	41%	36%	17%	3%
Equipment and machinery	72%	21%	17%	17%	10%
Internet and technological services	67%	31%	31%	20%	5%
Office furniture and accessories	67%	29%	16%	23%	6%
Office supplies	62%	55%	38%	23%	3%
Marketing and printing services	49%	27%	20%	36%	9%
Logistics and transportation	44%	20%	13%	27%	24%
Financial services: banking and insurance	40%	14%	20%	42%	8%
Raw materials	37%	17%	12%	23%	35%
Professional services: accounting, legal, and consulting services	32%	3%	5%	52%	15%

Base: All respondents. Those who preferred not to answer were excluded from the calculation base. (n=432 to n=438)

Customer online activities
Atlantic Canada

For each of the following elements, please indicate if you search for it online, order it online, and/or pay for it online?
Multiple answers allowed.

	Search Online	Order Online	Pay Online	No, We Do Not Search, Order or Pay for it Online	Not applicable
Technological devices and components: hardware, software, telephones, etc.	77%	47%	52%	16%	3%
Equipment and machinery	67%	25%	26%	16%	9%
Internet and technological services	65%	30%	32%	24%	3%
Office supplies	58%	50%	40%	30%	2%
Office furniture and accessories	55%	21%	24%	34%	5%
Logistics and transportation	34%	19%	11%	37%	23%
Raw materials	33%	27%	16%	20%	34%
Marketing and printing services	33%	21%	14%	54%	7%
Financial services: banking and insurance	26%	6%	27%	39%	16%
Professional services: accounting, legal, and consulting services	10%	1%	3%	68%	20%

Base: All respondents. Those who preferred not to answer were excluded from the calculation base. (n=47)

Customer online activities
Quebec

For each of the following elements, please indicate if you search for it online, order it online, and/or pay for it online?
Multiple answers allowed.

	Search Online	Order Online	Pay Online	No, We Do Not Search, Order or Pay for it Online	Not applicable
Technological devices and components: hardware, software, telephones, etc.	76%	41%	32%	14%	5%
Equipment and machinery	71%	20%	14%	12%	16%
Office furniture and accessories	65%	39%	21%	19%	10%
Internet and technological services	65%	33%	24%	17%	12%
Office supplies	64%	55%	32%	13%	5%
Logistics and transportation	46%	20%	11%	20%	28%
Financial services: banking and insurance	45%	19%	24%	31%	13%
Marketing and printing services	40%	24%	16%	35%	18%
Raw materials	38%	22%	12%	18%	36%
Professional services: accounting, legal, and consulting services	33%	2%	1%	39%	27%

Base: All respondents. Those who preferred not to answer were excluded from the calculation base. (n=109 to n=112)

Customer online activities *Ontario*

For each of the following elements, please indicate if you search for it online, order it online, and/or pay for it online?
Multiple answers allowed.

	Search Online	Order Online	Pay Online	No, We Do Not Search, Order or Pay for it Online	Not applicable
Technological devices and components: hardware, software, telephones, etc.	79%	43%	38%	18%	1%
Office furniture and accessories	71%	27%	12%	22%	2%
Equipment and machinery	71%	20%	17%	17%	9%
Internet and technological services	66%	36%	39%	22%	3%
Office supplies	63%	59%	43%	23%	2%
Marketing and printing services	51%	32%	21%	35%	7%
Logistics and transportation	41%	19%	13%	25%	27%
Financial services: banking and insurance	39%	15%	18%	42%	9%
Professional services: accounting, legal, and consulting services	34%	3%	7%	49%	15%
Raw materials	33%	13%	8%	25%	39%

Base: All respondents. Those who preferred not to answer were excluded from the calculation base. (n=123 to n=125)

Customer online activities
Western Canada

For each of the following elements, please indicate if you search for it online, order it online, and/or pay for it online?
Multiple answers allowed.

	Search Online	Order Online	Pay Online	No, We Do Not Search, Order or Pay for it Online	Not applicable
Technological devices and components: hardware, software, telephones, etc.	74%	37%	34%	19%	5%
Equipment and machinery	73%	20%	16%	18%	8%
Internet and technological services	69%	27%	27%	19%	3%
Office furniture and accessories	66%	26%	15%	24%	6%
Office supplies	61%	51%	37%	26%	3%
Marketing and printing services	54%	26%	21%	36%	5%
Logistics and transportation	47%	21%	13%	32%	17%
Raw materials	41%	15%	13%	26%	30%
Financial services: banking and insurance	40%	10%	18%	50%	2%
Professional services: accounting, legal, and consulting services	33%	5%	5%	58%	8%

Base: All respondents. Those who preferred not to answer were excluded from the calculation base.
(n=151 to n=154)

Customer online activities
Fewer than 5 employees

For each of the following elements, please indicate if you search for it online, order it online, and/or pay for it online?
Multiple answers allowed.

	Search Online	Order Online	Pay Online	No, We Do Not Search, Order or Pay for it Online	Not applicable
Technological devices and components: hardware, software, telephones, etc.	78%	38%	34%	18%	3%
Internet and technological services	71%	30%	30%	18%	4%
Equipment and machinery	68%	22%	18%	19%	12%
Office furniture and accessories	66%	22%	11%	26%	5%
Office supplies	59%	42%	32%	31%	2%
Marketing and printing services	47%	30%	21%	38%	8%
Logistics and transportation	42%	18%	15%	27%	27%
Financial services: banking and insurance	40%	11%	18%	42%	7%
Raw materials	33%	15%	10%	25%	38%
Professional services: accounting, legal, and consulting services	33%	4%	5%	52%	14%

Base: All respondents. Those who preferred not to answer were excluded from the calculation base. (n=142 to n=145)

Customer online activities *5 to 19 employees*

For each of the following elements, please indicate if you search for it online, order it online, and/or pay for it online?
Multiple answers allowed.

	Search Online	Order Online	Pay Online	No, We Do Not Search, Order or Pay for it Online	Not applicable
Equipment and machinery	78%	21%	18%	14%	7%
Technological devices and components: hardware, software, telephones, etc.	74%	47%	43%	17%	4%
Office supplies	69%	71%	48%	13%	3%
Office furniture and accessories	69%	36%	24%	20%	6%
Internet and technological services	65%	31%	33%	23%	5%
Marketing and printing services	51%	25%	20%	36%	8%
Logistics and transportation	46%	21%	11%	26%	22%
Financial services: banking and insurance	42%	17%	22%	43%	8%
Raw materials	42%	17%	12%	21%	33%
Professional services: accounting, legal, and consulting services	32%	1%	4%	51%	16%

Base: All respondents. Those who preferred not to answer were excluded from the calculation base. (n=168 to n=171)

Customer online activities
20 to 49 employees

For each of the following elements, please indicate if you search for it online, order it online, and/or pay for it online?
Multiple answers allowed.

	Search Online	Order Online	Pay Online	No, We Do Not Search, Order or Pay for it Online	Not applicable
Technological devices and components: hardware, software, telephones, etc.	78%	42%	31%	15%	3%
Equipment and machinery	76%	17%	10%	12%	9%
Office furniture and accessories	68%	39%	23%	16%	4%
Office supplies	64%	73%	50%	10%	4%
Internet and technological services	55%	39%	28%	23%	11%
Logistics and transportation	52%	37%	13%	30%	8%
Marketing and printing services	50%	25%	16%	30%	12%
Raw materials	43%	21%	13%	20%	27%
Financial services: banking and insurance	34%	21%	27%	43%	9%
Professional services: accounting, legal, and consulting services	31%	4%	7%	55%	13%

Base: All respondents. Those who preferred not to answer were excluded from the calculation base. (n=68 to n=69)

Customer online activities
50 or more employees

For each of the following elements, please indicate if you search for it online, order it online, and/or pay for it online?
Multiple answers allowed.

	Search Online	Order Online	Pay Online	No, We Do Not Search, Order or Pay for it Online	Not applicable
Technological devices and components: hardware, software, telephones, etc.	72%	36%	24%	12%	10%
Equipment and machinery	67%	13%	8%	17%	10%
Office furniture and accessories	58%	35%	15%	16%	12%
Internet and technological services	57%	31%	23%	22%	10%
Office supplies	53%	57%	30%	15%	6%
Marketing and printing services	43%	16%	5%	34%	17%
Logistics and transportation	38%	15%	4%	29%	31%
Raw materials	35%	17%	18%	26%	28%
Financial services: banking and insurance	31%	9%	8%	46%	18%
Professional services: accounting, legal, and consulting services	23%	5%	7%	45%	31%

Base: All respondents. Those who preferred not to answer were excluded from the calculation base. (n=52 to n=53)

Online activities

Which of the following does your company have and utilize? *Multiple answers allowed.*

	Total (n=433)	Atlantic Canada (n=46)	Quebec (n=110)	Ontario (n=123)	Western Canada (n=154)
A non-transactional company website	**75%**	74%	65%	80%	76%
Social media postings (e.g. Facebook, Twitter, LinkedIn, Pinterest, Instagram, etc.)	**56%**	55%	48%	59%	57%
Online analytics and visitor tracking (e.g. Google Analytics)	**46%**	31%	44%	44%	51%
Search engine optimization (SEO)	**45%**	36%	50%	41%	49%
Online advertisement or paid search	**30%**	29%	29%	29%	32%
Customer Relationship Management (CRM)	**28%**	21%	20%	29%	34%
A transactional company website (i.e. ability to perform online transactions)	**22%**	26%	28%	19%	21%
Lead nurturing strategy	**20%**	23%	23%	19%	17%
Enterprise Resource Planning (ERP)	**8%**	2%	6%	8%	10%
Other	**2%**	2%	4%	2%	1%
None of the above	**6%**	4%	11%	4%	6%

Base: All respondents. Those who preferred not to answer were excluded from the calculation base.

Online activities (cont'd)

Which of the following does your company have and utilize? *Multiple answers allowed.*

	Total (n=433)	Fewer than 5 employees (n=142)	5 to 19 employees (n=170)	20 to 49 employees (n=69)	50 or more employees (n=52)
A non-transactional company website	**75%**	72%	77%	78%	77%
Social media postings (e.g. Facebook, Twitter, LinkedIn, Pinterest, Instagram, etc.)	**56%**	57%	57%	45%	47%
Online analytics and visitor tracking (e.g. Google Analytics)	**46%**	44%	49%	47%	37%
Search engine optimization (SEO)	**45%**	42%	50%	53%	36%
Online advertisement or paid search	**30%**	27%	35%	31%	36%
Customer Relationship Management (CRM)	**28%**	**22%**	**36%**	35%	39%
A transactional company website (i.e. ability to perform online transactions)	**22%**	22%	**20%**	22%	**40%**
Lead nurturing strategy	**20%**	17%	21%	29%	23%
Enterprise Resource Planning (ERP)	**8%**	**6%**	**7%**	**12%**	**34%**
Other	**2%**	3%	1%	2%	0%
None of the above	**6%**	8%	4%	7%	0%

Base: All respondents. Those who preferred not to answer were excluded from the calculation base.
*Numbers in **red** and **green** highlight statistically significant differences between sub-groups.*

Research and Market Intelligence at BDC marketingresearch@bdc.ca

Business Development Bank of Canada

Head Office 5 Place Ville Marie, Suite 300, Montreal QC H3B 5E7

BDC

Entrepreneurs first