

When Worlds Converge: Similarities in Brand Reception and Media Consumption of IT and Personal Technology Buyers

September 2011



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Table of Contents

Executive Summary.....	2
Conclusions.....	4
Survey Methodology and Demographics.....	5
Research Analysis.....	6
About TechTarget.....	36

Executive Summary

Our most recent Media Consumption Report survey was fielded to a combined audience of both enterprise information technology (IT) and personal technology buyers. The goal of this study was to establish whether there are similarities in how IT buyers and personal consumers respond to brand advertisements as well as general content offers in online media.

Overall, the study reveals:

- There are striking similarities between IT buyers and personal technology buyers in media consumption relative to the buying stage
- Branding messages need to be topically focused in contextually-relevant environments as well as converged with social communities to achieve maximum impact
- More than 90% of both consumer and IT buyers indicate that they are likely to visit a vendor's website after viewing their advertising
- The importance of integrating website branding into branding messaging running on third-party technology sites
- Both audiences indicate willingness to save relevant offers and research vendors at later times
- While white papers remain strong, IT buyers are shifting preference toward downloads when asked to provide registration information—consumers prefer to provide registration on technology-focused websites
- Significant reduction in sales cycles compared to past years, results show:
 - IT buyers: buy cycle has reduced from 12 months to 6 months
 - Consumers: typical buy cycle is 2 months or less
- Pricing is a chief consideration for personal technology consumers when evaluating brands; due to shorter cycles and more commoditization, pricing is an up-front concern
- IT buyers look for product information in the early stages of their process, whereas personal consumers need this in all stages

- Personal email accounts are frequently used by IT buyers; this is consistent with what we have learned in previous studies, that IT buyers are “cataloguers”—personal email provides them with tools to catalogue and separate vendor offers from daily business communications and use for later follow-up
- Similar to past studies, vendor comparison content and messaging are highly effective; most usage occurs in later stages, but it is used across all buying stages by both audiences
- Consumers show consistently high usage and affinity for video-related advertising and content
- Both audiences are using social media as an integral part of their buying process; 9 out of 10 buyers visit social communities and more than half contribute to these communities

Conclusions

An increasing number of business technology users who have buying authority within their organizations, as well as personal technology buyers, are relying on independent and third-party sources for information that can be used to make more informed buying decisions for their organizations. Specifically, these buyers are gathering information from trusted review and evaluation sources, incorporating peer recommendations and insights (from discussion forums and targeted social media sites), and performing their own research via online sources as they 'self-educate' themselves to make an educated buy.

It is incumbent upon the marketer to figure out the best way to introduce his/her brand and media offers to technology users in a way that they are receptive to them. One notable conclusion from this survey is that, within the context of branding, it needs to be done within relevant environments with offers that are also topically relevant in order to maximize the impact of overall branding messages.

Also worth noting is the response indicating that 90% of users are likely to visit a vendor's website after viewing a branding ad in a third-party environment. What the user sees and hears once they do this should be of the utmost importance to marketers who are staging a branding campaign or trying to capture registrations.

This calls for a highly integrated look and feel that strongly connects the messages from the brand ad to the landing page relative to contextual offers in the branding ad. If users are willing to move from one ad venue to another and continue the educational process, the marketer needs to insure brand consistency throughout their journey.

Survey Methodology and Demographics

Methodology

- 4,252 completed survey respondents
- 3,269 IT buyers
- 983 consumers
- Online survey fielded through SurveyGizmo.com
- Respondents part of opt-in IT Research Panel

Demographics

Respondent breakdown

- Corporate IT buyers: 77%
- Technology consumers: 23%

IT buyer roles

- Sr. management: 15%
- IT management: 32%
- Developer/Administrator: 21%
- IT staff: 16%

IT buyer company sizes

- Small: 32%
- Midsized: 26%
- Large: 42%

Top IT buyer industries

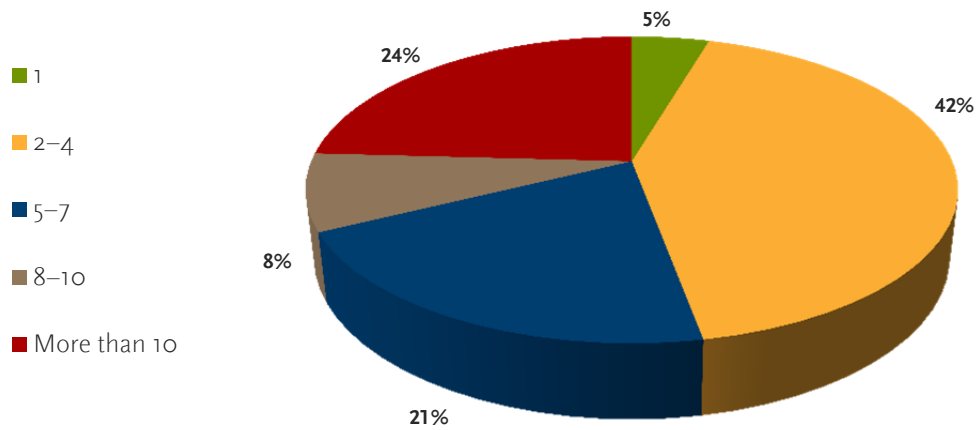
- Financial: 12%
- Education: 8%
- Government: 7%
- Healthcare: 7%

Global breakdown

- North America: 50%
- EMEA: 33%
- Asia-Pacific: 17%
- Latin America: 1%

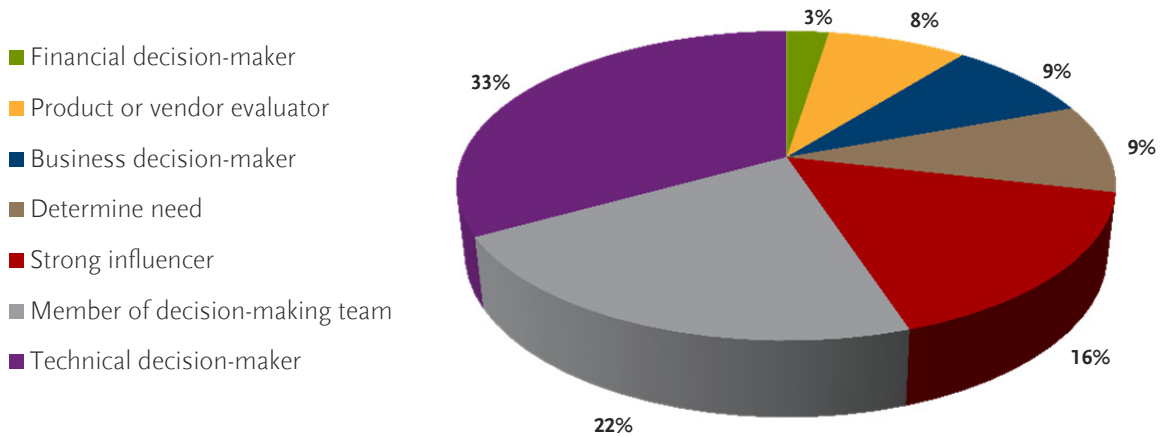
At your organization, how many people are typically involved in the technology research and decision-making process?

Team Dynamics: Corporate IT buying is a team decision-making process with 95% of IT buying teams having more than 2 members. The majority work in teams of 2-7 with a significant amount of teams having 10 or more members.



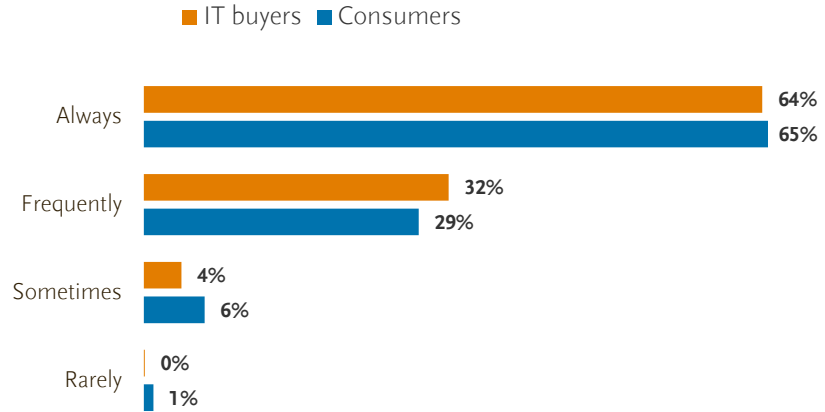
Which of the following best describes your primary responsibility regarding researching and/or purchasing technology products/solutions?

IT buyers have specific roles in the buying process and conduct role-based research—45% are decision-makers.



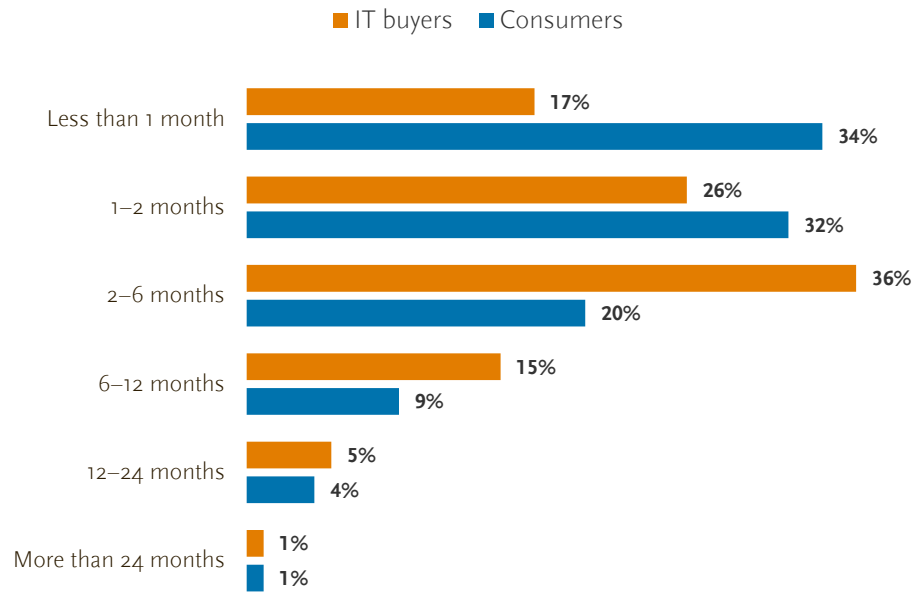
Based on your role during the decision-making process, how often do you use the internet to research information on technology products/solutions?

All buyers use the internet for researching products/solutions 100% of the time.



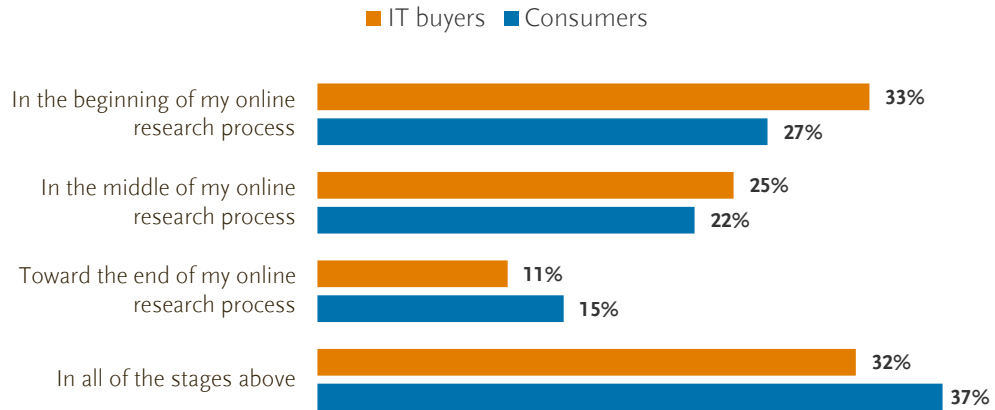
On average, how long is your timeframe from identifying your need/problem to making your purchase decision?

IT and consumer buying cycles are typically 6 months or less—Consumer cycles are typically focused to 2 months or less.



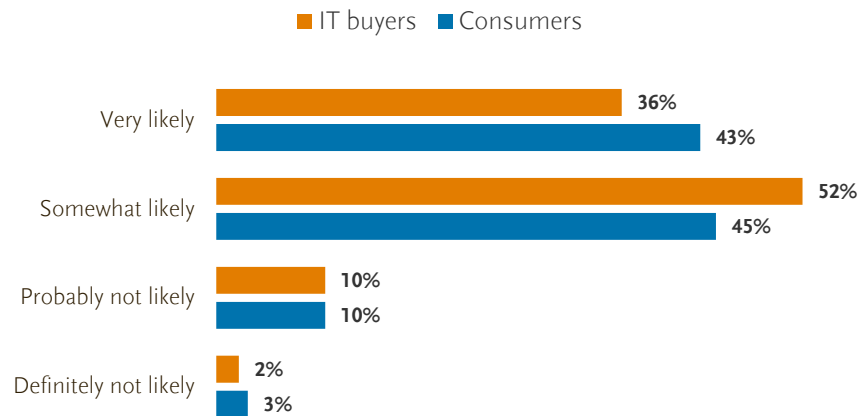
When it comes to viewing and paying attention to the messages in online advertisements for technology products/solutions, I am most receptive to them...

Buyers are influenced by online advertising in all cycles of their buying process. Concentration of influence occurs during beginning (awareness) and middle (consideration) stages.



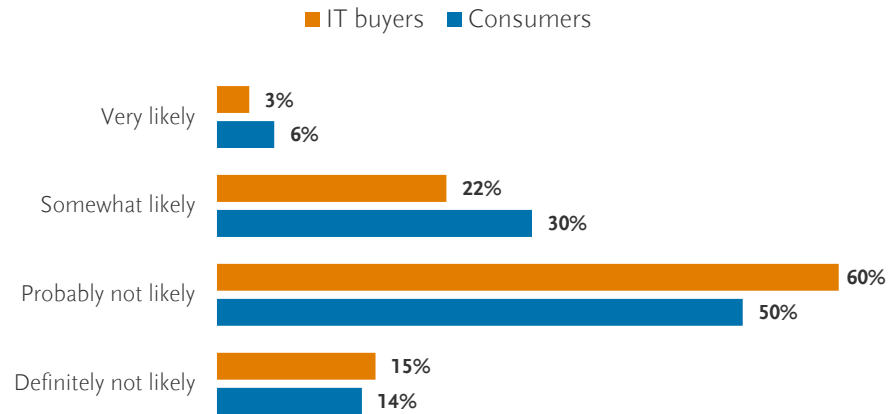
After seeing an online advertisement that relates to the content you are viewing, how likely are you to further research or consider that brand?

Contextually-relevant advertising influences technology buyers to further consider brands.



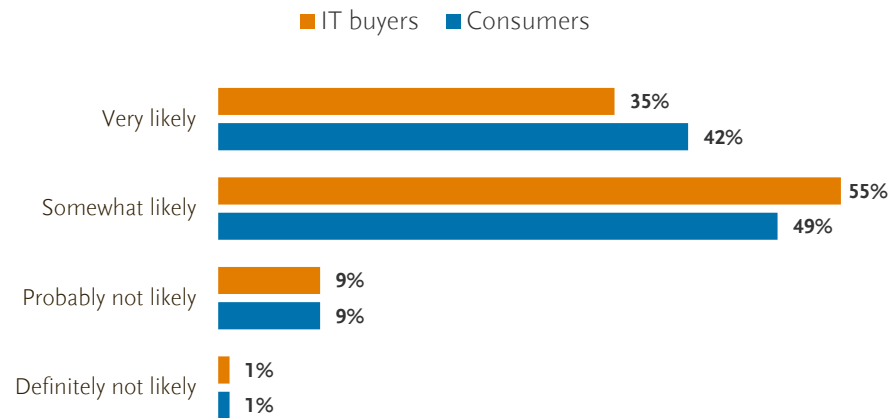
After seeing an online advertisement that does not relate to the content you are viewing, how likely are you to further research or consider that brand?

Conversely, non-contextual messaging gets less consideration from buyers.



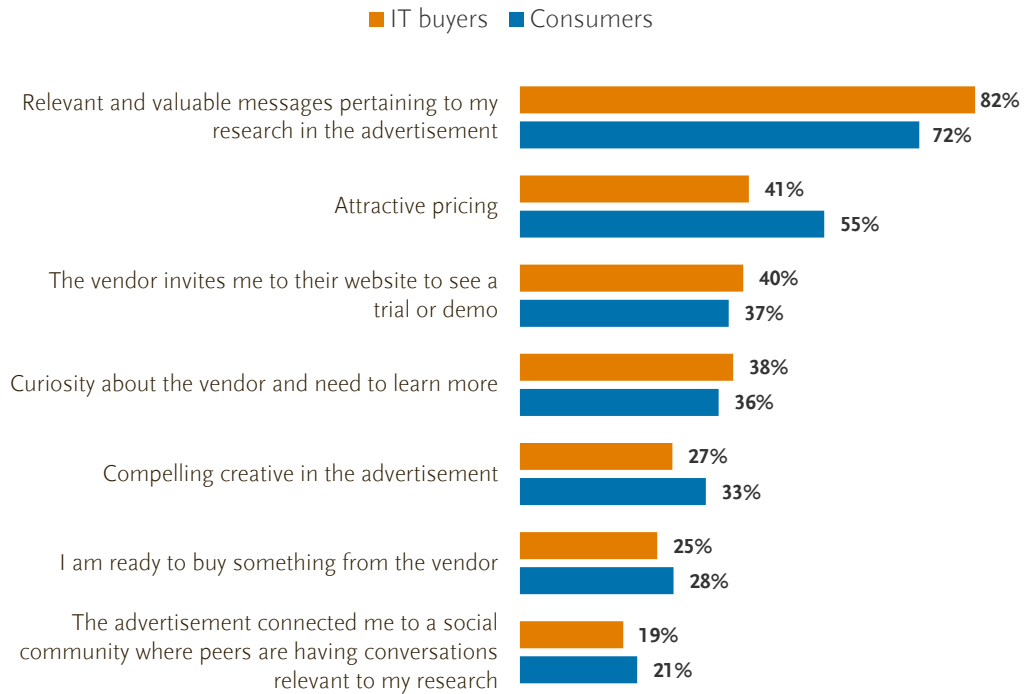
How likely are you to visit a vendor's website after viewing their online advertisement for a technology product/solution?

More than 90% of buyers will visit a vendor website after seeing an advertisement for their product/solution.



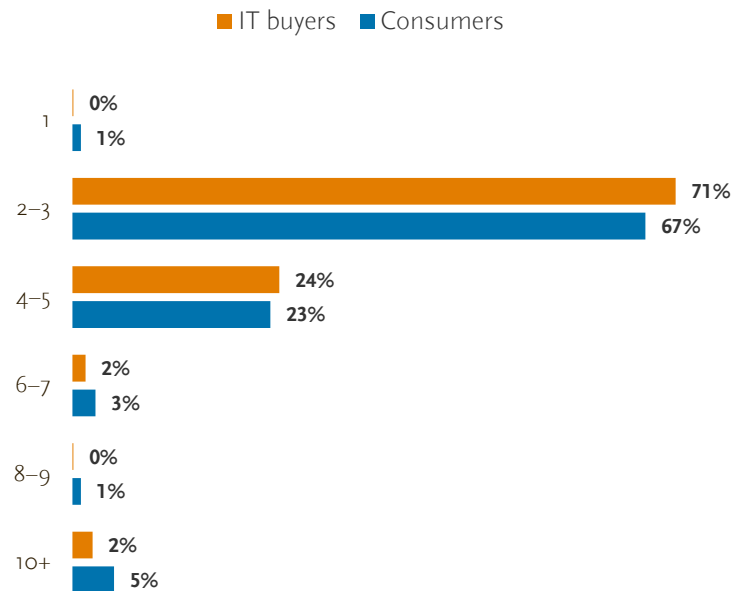
Please select which of the following aspects of an online advertisement for a technology product/solution that would compel you to visit a vendor's website.

Relevant messaging in advertising is most effective for driving vendor website visits. Pricing is almost equally effective for consumers.



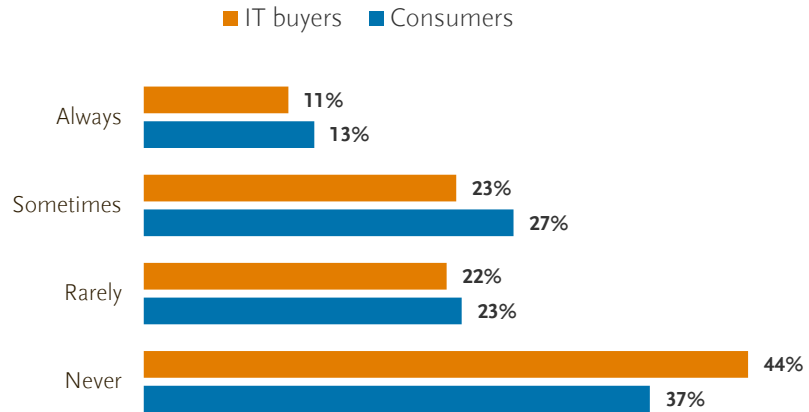
On average, how many vendors do you consider as part of your short-list when you are nearing the final stages of your research process?

Buyers universally consider 2–5 brands as part of their short-lists.



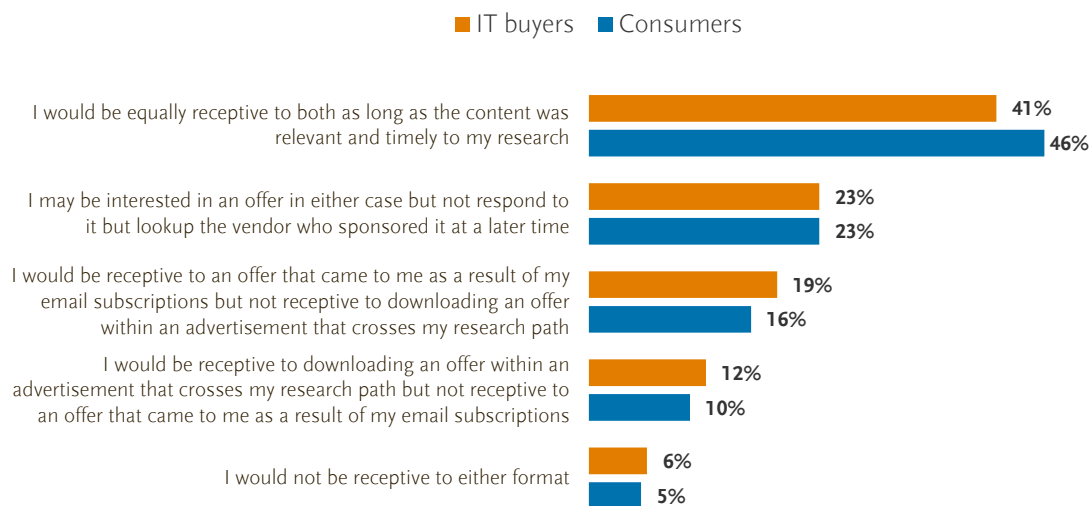
How often are you willing to read through and click on an online branding advertisement or email offer that is not in your native language?

Most prefer messaging in their own language, but will respond to non-native messaging if relevant to their research.



If you had to compare the value of an offer (i.e., white paper or trial) presented to you as a result of an email subscription or through an online advertisement that you came across during one of your searches that had identical messages, which of the following would be true?

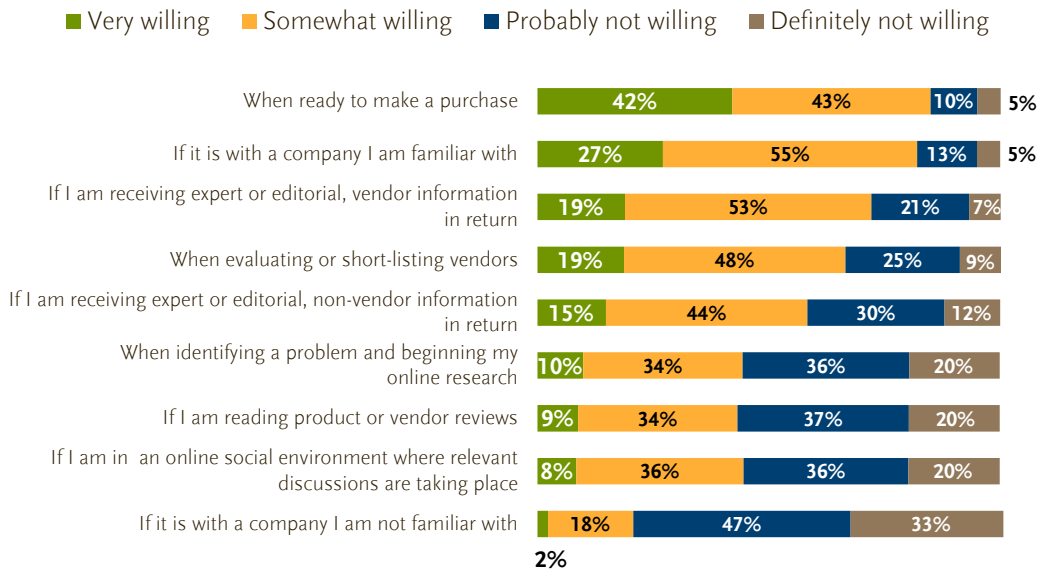
Buyers are equally receptive to offers in branding ads or email. Many also indicate a willingness to “save” offers for later response.



IT Buyer Data

At times, online advertisements for technology products/solutions will ask viewers to register and share their contact information in order to access specific content. Using the scale below, please indicate how willing you would be to share your contact information in the following scenarios:

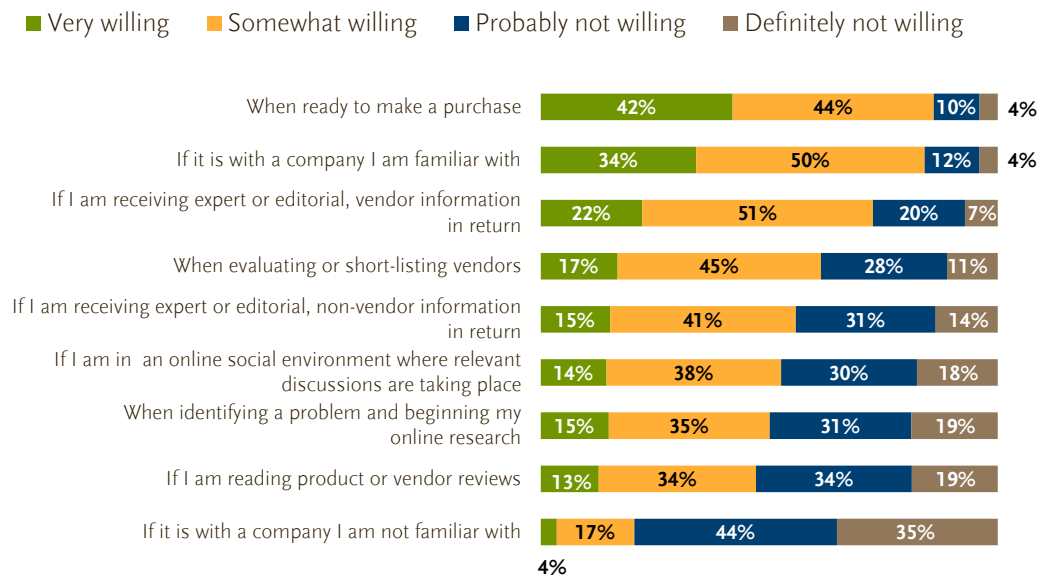
IT buyers: Readiness to buy, vendor familiarity, and information quality are the top drivers for sharing contact information with vendors.



Consumer Data

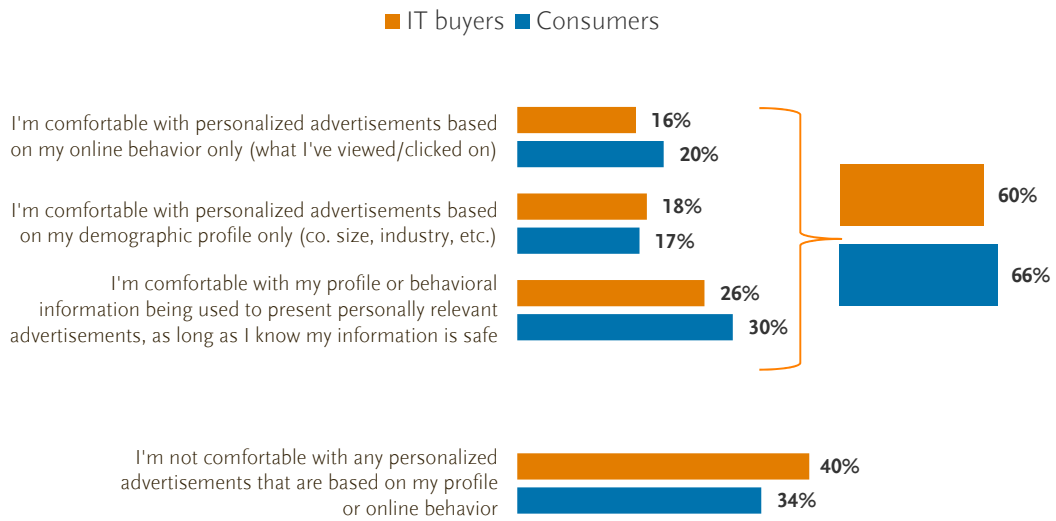
At times, online advertisements for technology products/solutions will ask viewers to register and share their contact information in order to access specific content. Using the scale below, please indicate how willing you would be to share your contact information in the following scenarios:

Consumers: Readiness to buy, vendor familiarity and information quality are also top drivers. They also show more willingness to share contact information in social and/or product review environments.



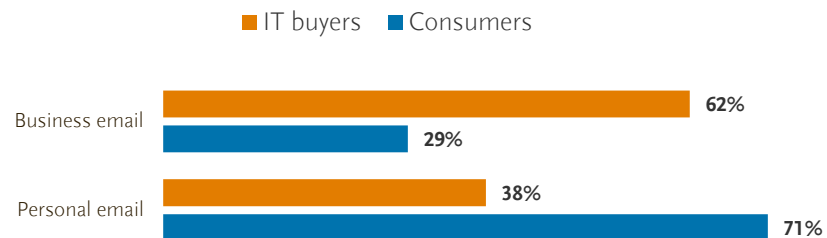
Many websites display specific online advertisements for technology products/ solutions based on the user's profile or online behavior. Please select which of the following you agree with.

The majority of buyers are comfortable with personal profile information being used as long as it is used to better tailor messaging and provide relevant offers.



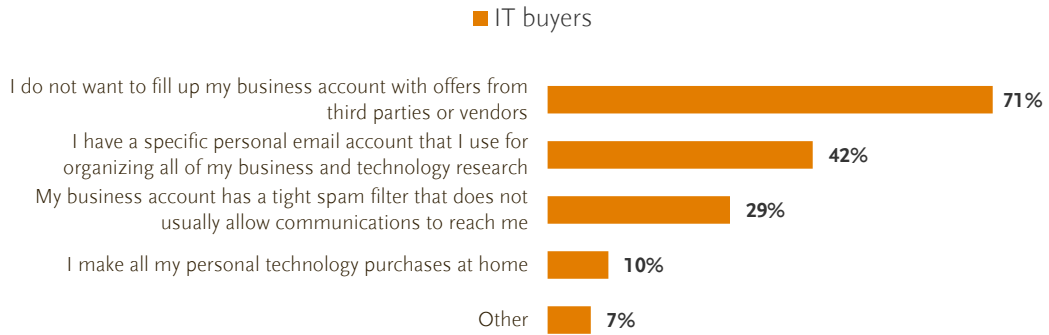
When asked to provide an email address during a registration process, do you typically use your business email address or a personal email address (i.e., Gmail, Yahoo!, Hotmail, etc.)?

When registering for vendor information, IT buyers prefer to be contacted via business email and consumers via personal email. However, more than 1/3 of corporate IT buyers indicated they use their personal email for business.



What are your reasons for using a personal email account when completing a registration form?

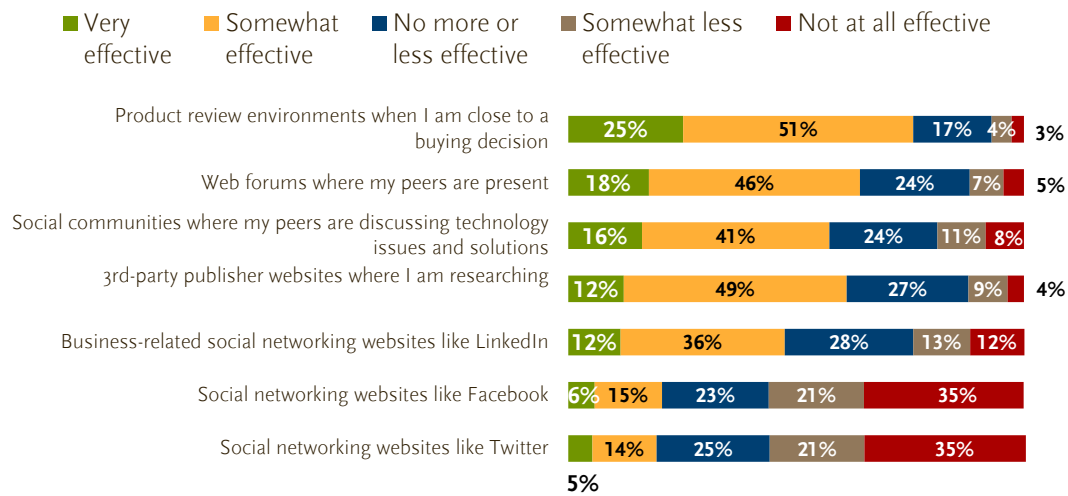
Most IT buyers purposefully use their personal emails to separate vendor offers from daily business communications and specifically organize them for follow-up.



IT Buyer Data

Please rate the general effectiveness that online advertisements for technology products/solutions have in these settings:

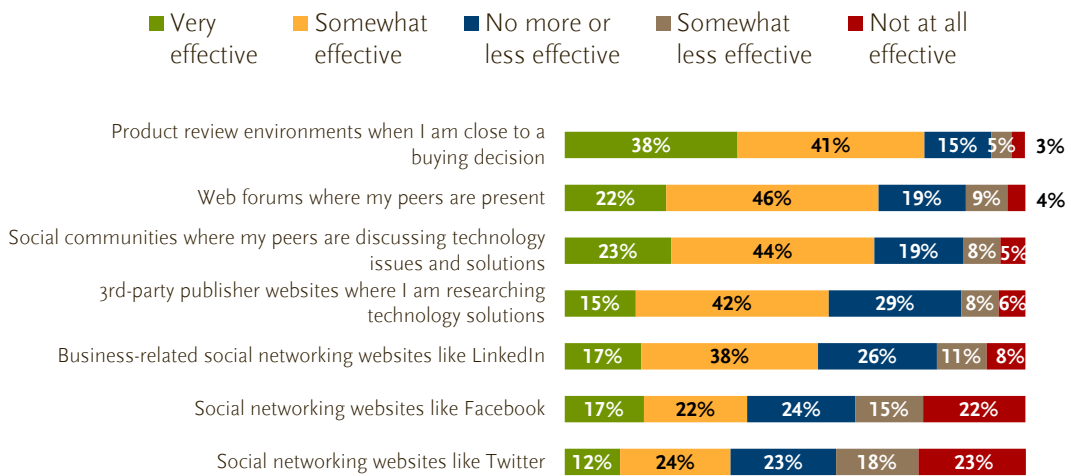
IT buyers prefer advertising within specific technology-related communities vs. general business or personal social networking environments.



Consumer Data

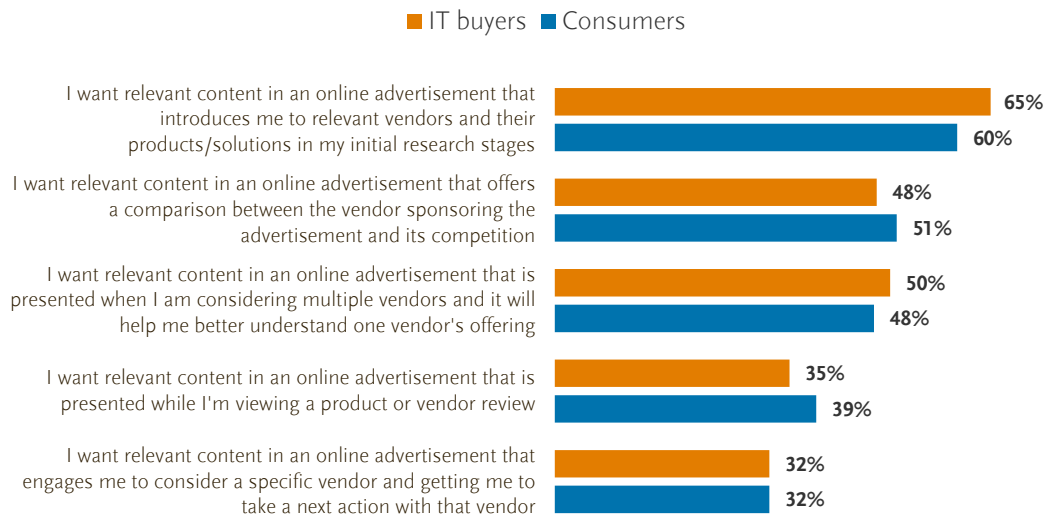
Please rate the general effectiveness that online advertisements for technology products/solutions have in these settings:

Consumers prefer advertising in product review and peer-driven technology forums.



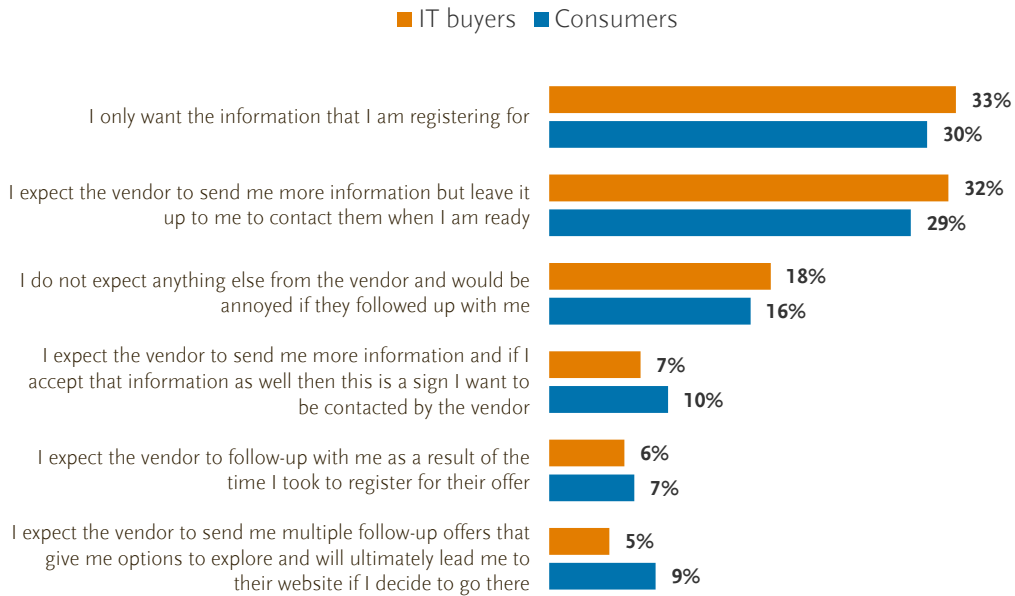
When thinking about the helpfulness of online advertisements while researching technology products and solutions, which of the following have real value for you based on the stage you are in during your buying process?

Buyers are influenced most by relevant online advertising presented during the early and middle stages of the buying process. Vendor comparison messaging is most useful to buyers as they consider providers and compile their short-lists.



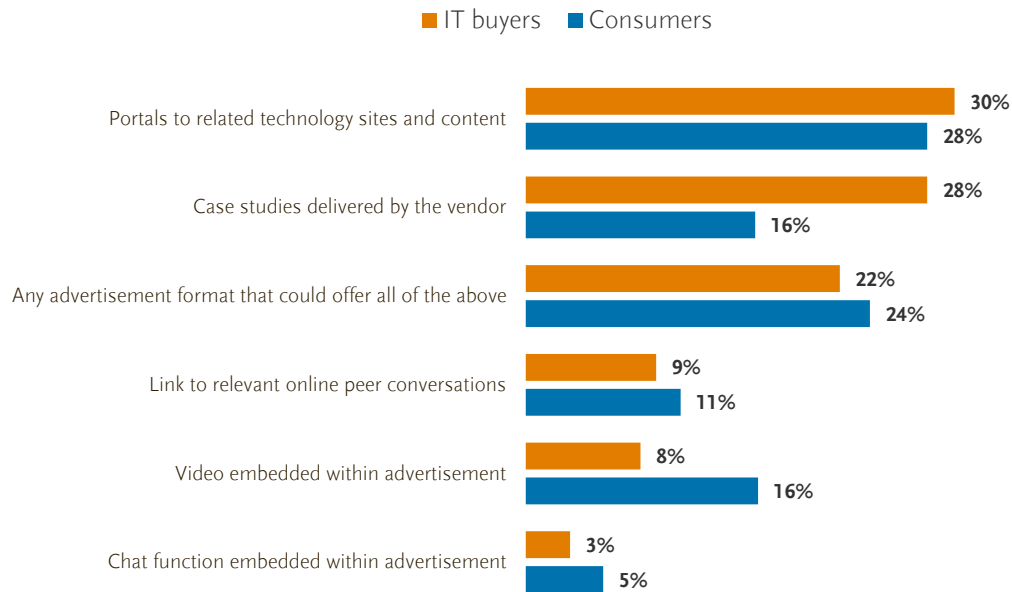
Many vendors will ask you to click on their advertisement by offering you relevant information (i.e., educational white paper, webcast, or link to their website). When a vendor does this, and you respond by clicking and downloading their offer, which of the following describes your mindset related to your actions?

Most buyers want vendors to send relevant follow-up information but prefer to contact them when they are ready to take next step.



Please indicate which of the following attributes of online branding advertisements you find most appealing.

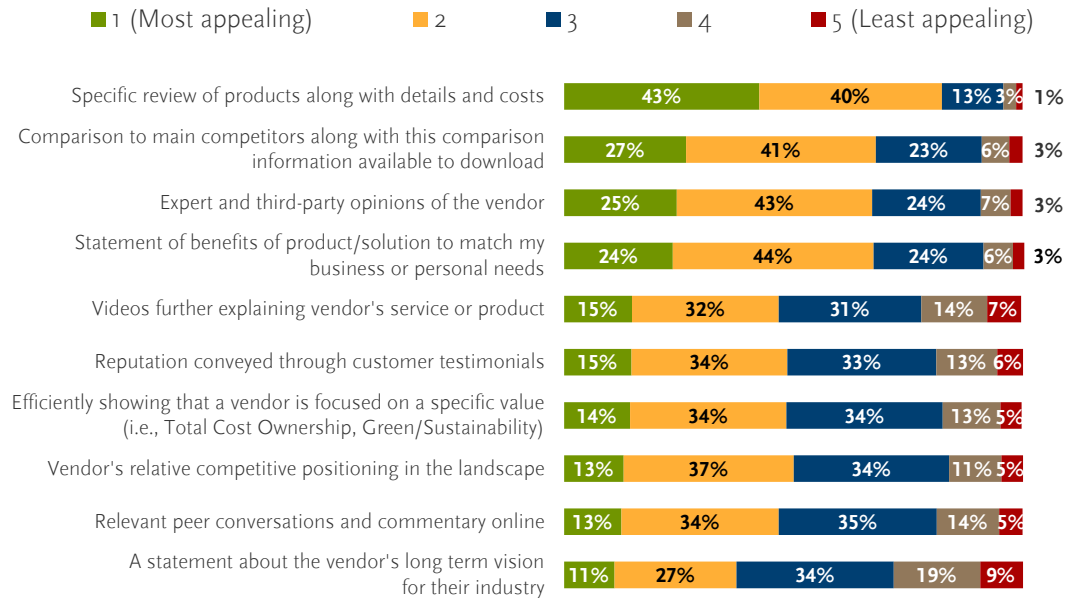
Branding ads that provide a link to related technology portals are most effective for all buyers. IT buyers also prefer case study messaging while consumers have high affinity for video advertising.



IT Buyer Data

Many technology vendors need your input as to what their branding advertisements should communicate to you. Please rank the following in terms of their appeal and value to you during your online research process.

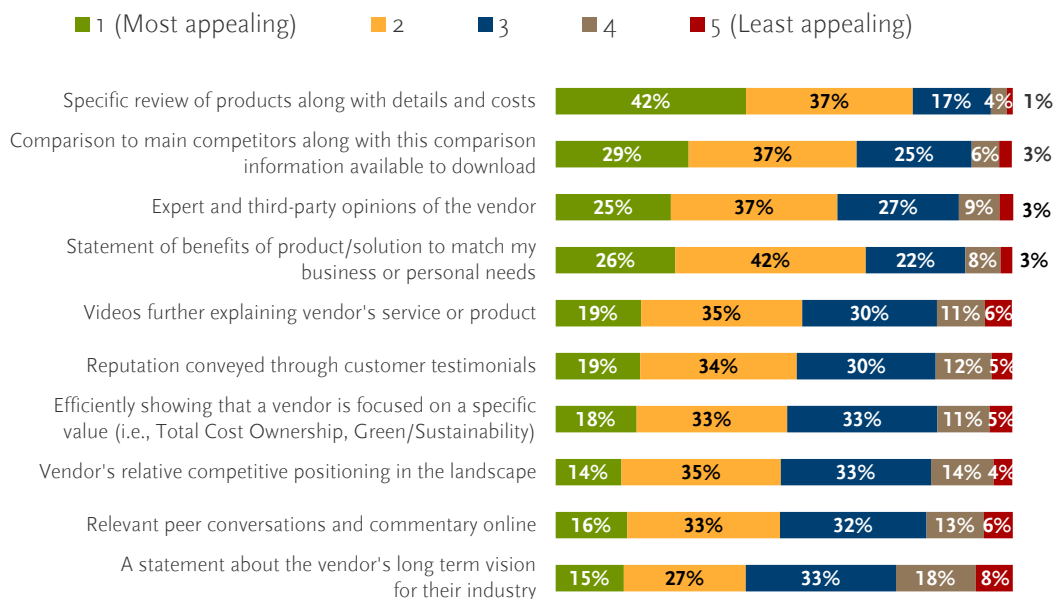
IT buyers look for branding ads to communicate specific solution benefits and values, as well as competitive positioning.



Consumer Data

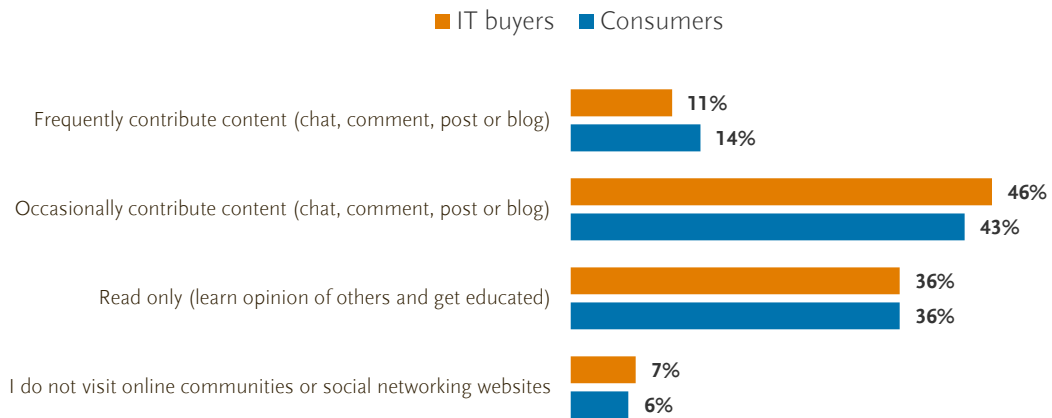
Many technology vendors need your input as to what their branding advertisements should communicate to you. Please rank the following in terms of their appeal and value to you during your online research process.

Consumers seek similar attributes in brand advertising, but gravitate more to video messaging than IT buyers.



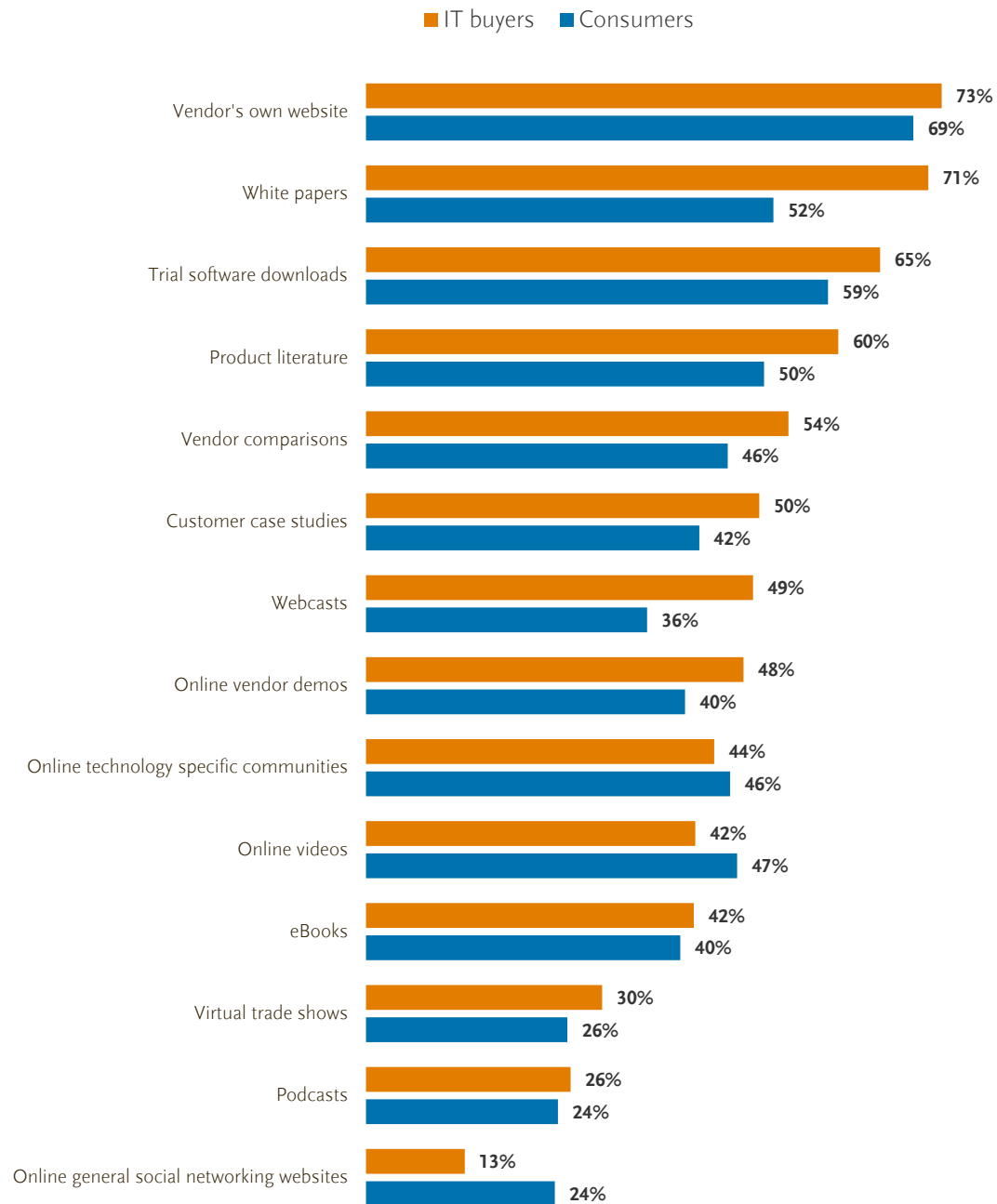
What is your level of participation in technology specific online communities (i.e., TechTarget's ITKnowledgeExchange.com) and general social networking websites (i.e., Facebook, LinkedIn, Twitter)?

93% of technology buyers visit online social communities in their research process and more than half contribute content to these communities.



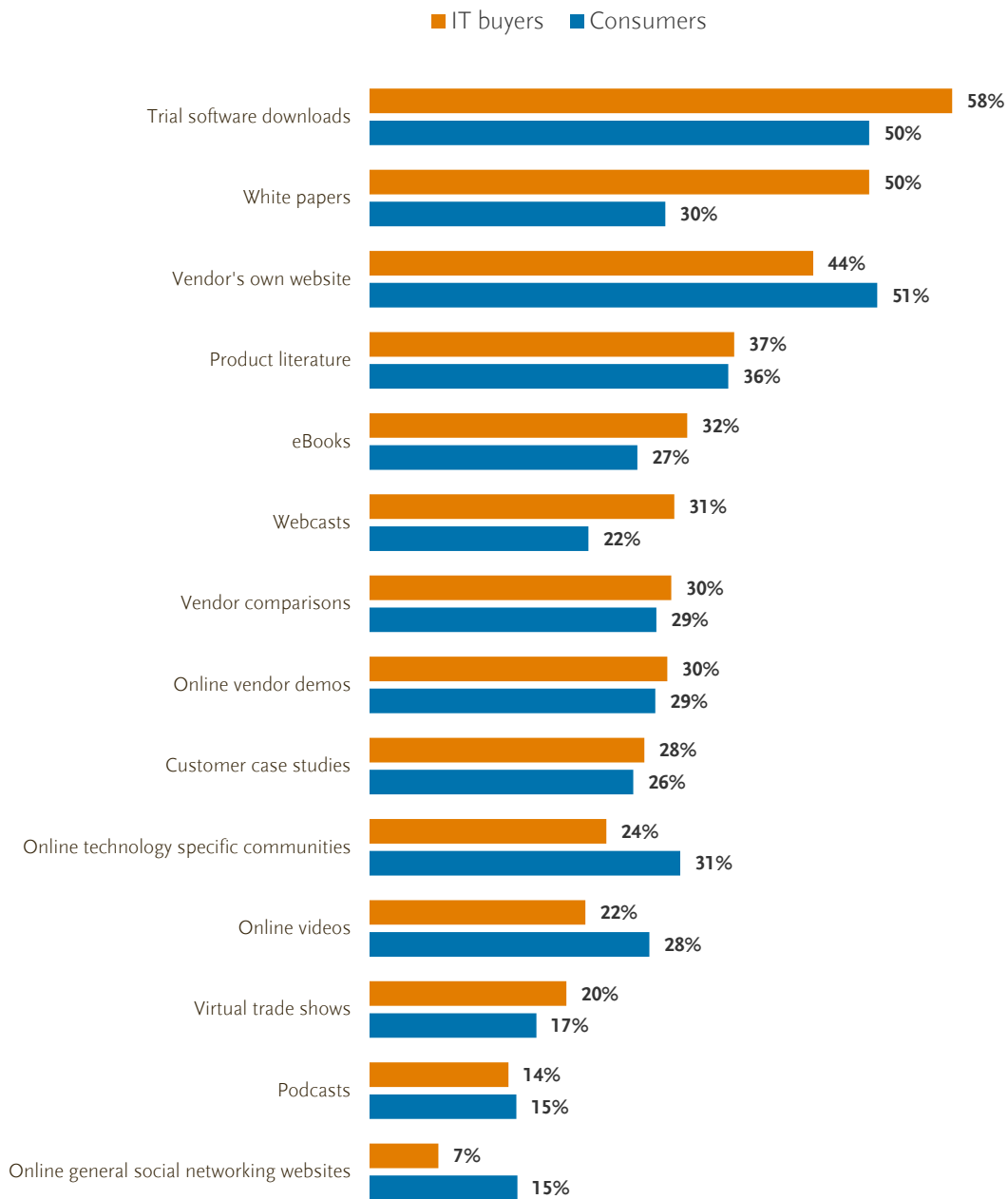
Please indicate which of these online media types or venues are appropriate for vendors to communicate their branding messages to you.

Vendor websites, white papers and product collateral are the most useful media types for communicating brand value to all buyers. Consumers are also highly influenced by video.



Please indicate which of these online media types or venues are appropriate for getting you to complete a registration form to receive more information from a vendor.

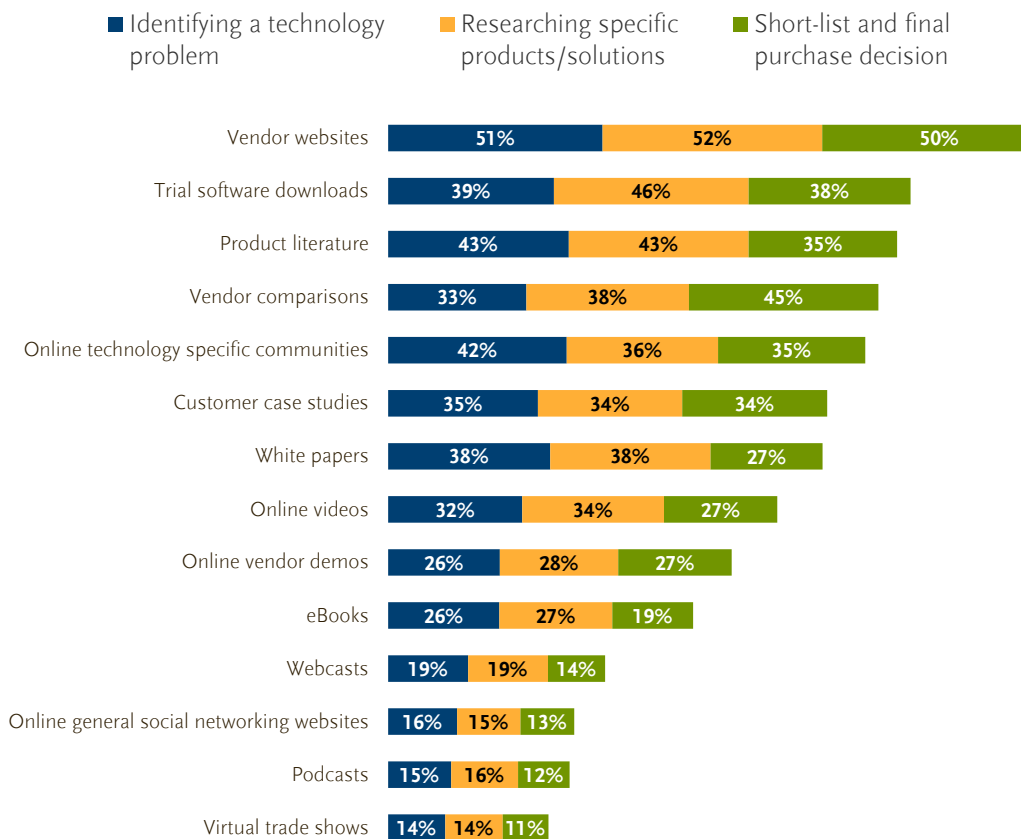
White papers remain strong, IT buyers are shifting preference toward downloads when providing registration information. Consumers prefer exchanging contact information on vendor and technology-focused websites.



IT Buyer Data

When researching and/or purchasing technology solutions, which online media types or venues are you most partial to?

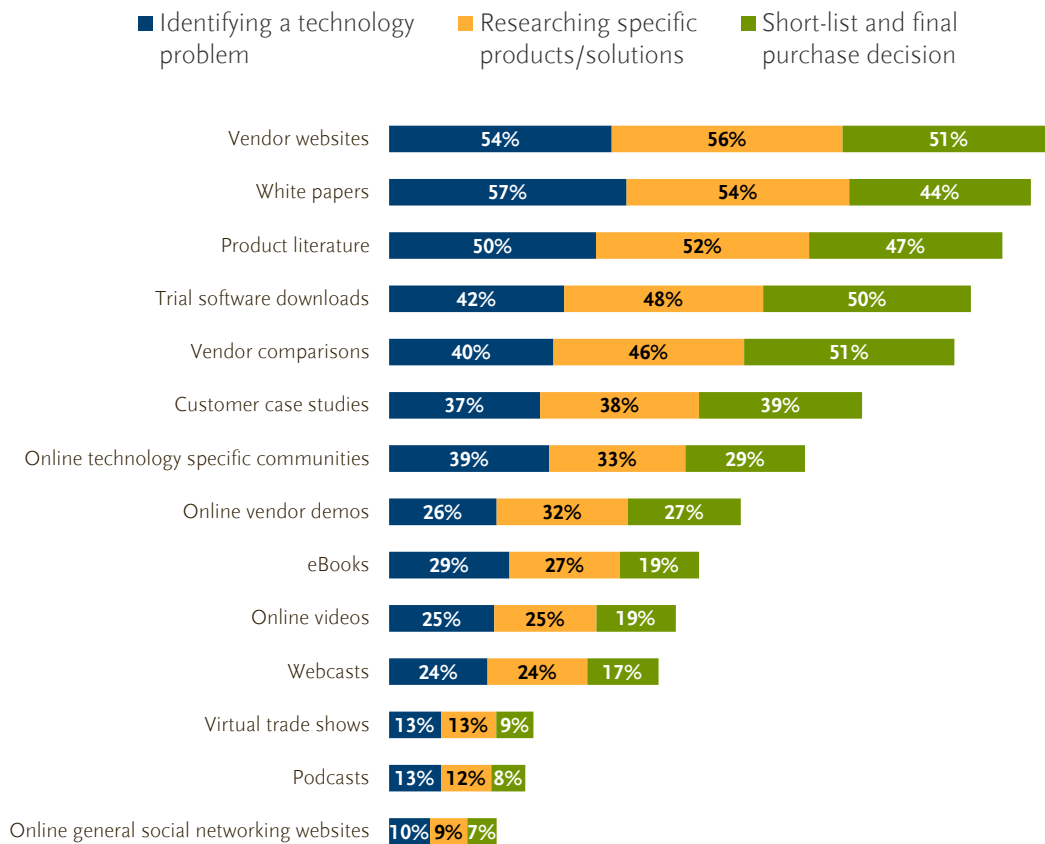
IT buyers prefer white papers and product literature as well as vendor sites and have increased use of vendor comparisons and trial downloads late stage.



Consumer Data

When researching and/or purchasing technology solutions, which online media types or venues are you most partial to?

Consumers prefer product-specific information in all stages and rely heavily on information found on vendor websites and technology-driven communities.





About TechTarget

TechTarget, Inc. (www.techtarget.com) (NASDAQ: TTGT) is a leading global technology media company with over 100 technology-specific websites, 10 million registered members, and more than 10 years of groundbreaking accomplishments. Our extensive editorial and vendor sponsored content fulfills the needs of tech pros looking for in-depth coverage of technology topics throughout their buying process and positions us to meet the needs of technology marketers targeting qualified technology audiences. Outside of North America, TechTarget runs 23 websites and has offices in London, Mumbai and Beijing.

For more questions or information about this research, contact:

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