2013/2014 TechTarget Media Consumption Research Brief

Content essentials for technology buying teams worldwide

How buyers are dictating content marketing and sales strategies globally

TechTarget®
Where serious technology buyers decide

Content essentials | Global study demographics | Team-driven research | Independent research process | Third-party and vendor expectations | Media type variety | Effectiveness of English content | Productive engagements | Key takeaways | Contact us

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Content essentials for technology buying teams worldwide

Identifying the needs and demands of global technology decision makers for effective content marketing

After being presented with a technology problem, IT departments around the world have teams that are tasked with conducting research, evaluating vendors and selecting the solution that will best satisfy their organization's needs. Because of the abundance and accessibility of information available online, buyers have become more independent and no longer need to rely on engaging technology vendors directly to gain an understanding of their solutions. Instead, global technology buying teams are becoming more reliant on content and media, including white papers, case studies, and online videos, to effectively compare vendors and get information on the solutions that will best solve their technology problems. As buyers arm themselves with the right tools and information to make more educated decisions, buy cycles are accelerating worldwide and marketers need to make sure their content marketing strategy is keeping pace.

About the study

Content essentials for technology buying teams worldwide aims to provide marketers with a complete understanding of how technology buying teams from different regions of the world consume content and expect to engage with technology vendors during the research and purchase process.

Fielded in over 74 countries and 6 languages, this research brief features the data and open-ended responses collected from more than 2,300 technology buyers worldwide and segments the results from North American, Latin American, European, and Asia-Pacific respondents. Each highlight from the study includes in-depth insight and suggested best practices for marketers to leverage in their future strategies.

Highlights from this study include:

- Technology buying teams frequently include a variety of titles and geographically dispersed members
- The project research and decision making process is moving rapidly for both established and emerging markets
- The need for both vendor and third-party content for a complete perspective
- The variety of media types required to move through the buy cycle
- The most effective and ineffective media types to engage non-English speaking technology buyers
- The information that technology buyers and vendors need to know about each other prior to engagement

This research brief does not include every question that was asked in our survey. To receive the full report data, please contact the *TechTarget Market Research Team*.

TechTarget's Media Consumption Report

Published annually since 2008, TechTarget's Media Consumption Report is recognized as an authoritative resource for examining global content marketing trends and investigating the research and purchase behaviors of technology buyers. Past reports can be found at *www.techtarget.com/research*.

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Global study demographics

North America

Region breakdown
United States:	89%
Canada:	11%

Company size
Small:	31%
Midsize:	24%
Large:	45%

Job titles
IT Staff:	19%
IT Management:	19%
Senior IT Management:	22%
Senior Non-IT Management:	4%

Industries
Healthcare:	17%
Financial:	10%
Education:	7%
Government:	6%

Total respondents — 249

EMEA

Region breakdown
United Kingdom:	27%
France:	14%
Spain:	12%
Germany:	11%

Company size
Small:	37%
Midsize:	23%
Large:	40%

Job titles
IT Staff:	17%
IT Management:	22%
Senior IT Management:	17%
Senior Non-IT Management:	5%

Industries
Services:	22%
Financial:	9%
Education:	6%
Government:	6%

Total respondents — 679

Latin America

Region breakdown
Mexico:	22%
Colombia:	14%
Venezuela:	10%
Argentina:	9%

Company size
Small:	32%
Midsize:	27%
Large:	41%

Job titles
IT Staff:	13%
IT Management:	14%
Senior IT Management:	20%
Senior Non-IT Management:	4%

Industries
Telecommunications:	11%
Financial:	9%
Education:	7%
Government:	7%

Total respondents — 565

APAC

Region breakdown
India:	31%
China:	20%
Japan:	15%
Australia/New Zealand:	14%

Company size
Small:	21%
Midsize:	30%
Large:	49%

Job titles
IT Staff:	19%
IT Management:	28%
Senior IT Management:	11%
Senior Non-IT Management:	5%

Industries
Financial:	8%
Education:	7%
Government:	5%

Total respondents — 900

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Technology buying teams are no longer defined by borders and locations

Over the past several years, it has been established that technology purchase decisions are made by many different members within the IT organization. Which means that multiple opinions and perspectives are required to make the most well-informed decision about a vendor's solution. Globally, 61% of technology buying teams include 5 or more people involved in the research process; 88% for companies with more than 1000 employees.

These teams continue to grow and involve members with various titles and roles within the department.

More than 93% of IT Staff members and IT Managers (97% in North America and 98% in Latin America) indicated that they are involved in this research process, either as a decision maker, influencer or implementer.

As buying teams expand, they are also becoming more global in scale. More than 50% of buying teams feature members in geographically dispersed locations contributing to technology purchases of all sizes. All members, regardless of location, are collectively researching, collaborating and comparing technology vendors and solutions related to their IT projects.

Buying teams are classified by IT project, not by location

More than half of technology buying teams include members in different geographies tasked with conducting research and making decisions about vendors and solutions

61%
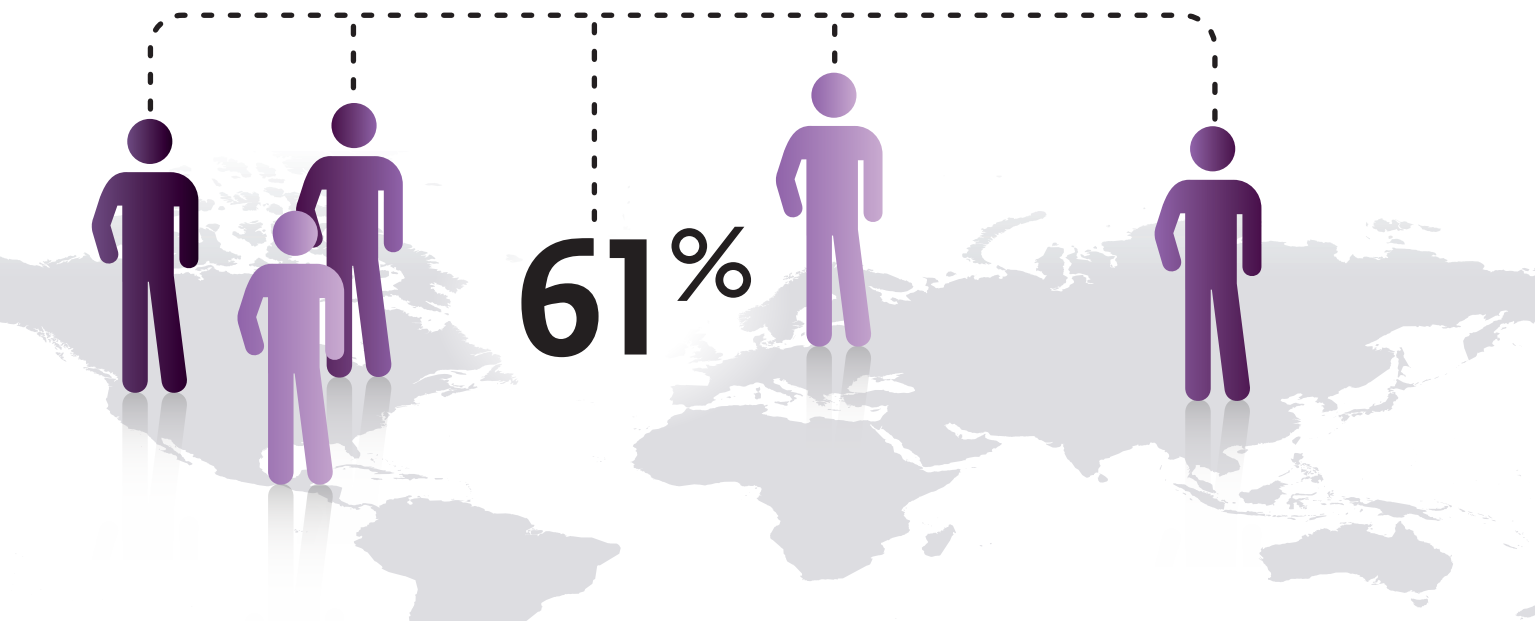
What does this mean for you?

The demand for content is coming from all directions—customize it accordingly

The IT decision-making team has expanded to incorporate more members with various roles and responsibilities, all of whom require information about your solution. You need to produce various content types and personas that speak to each member and avoid a one size fits all approach. To start, take a piece of content and repurpose it so it appeals to IT Staff, IT Management, and Senior IT Management.

Global organizations have global decision-makers

If all of your prospects from a single account are in one location, you may be missing a significant piece of the decision-making puzzle. Before passing leads to sales, look at the account and see if they have multiple locations. If so, you will want to promote your content and identify the decision makers in those locations so you can pass along complete, well-informed decision-making teams for the most effective follow-up.

Multi-regional content efforts must include consistent messaging to be effective

To maximize influence with multi-regional buying teams, it is key to maintain consistent messaging and themes as you expand content and marketing efforts to different regions. Also, be sure to *localize content* as needed to better engage in-country buyers.

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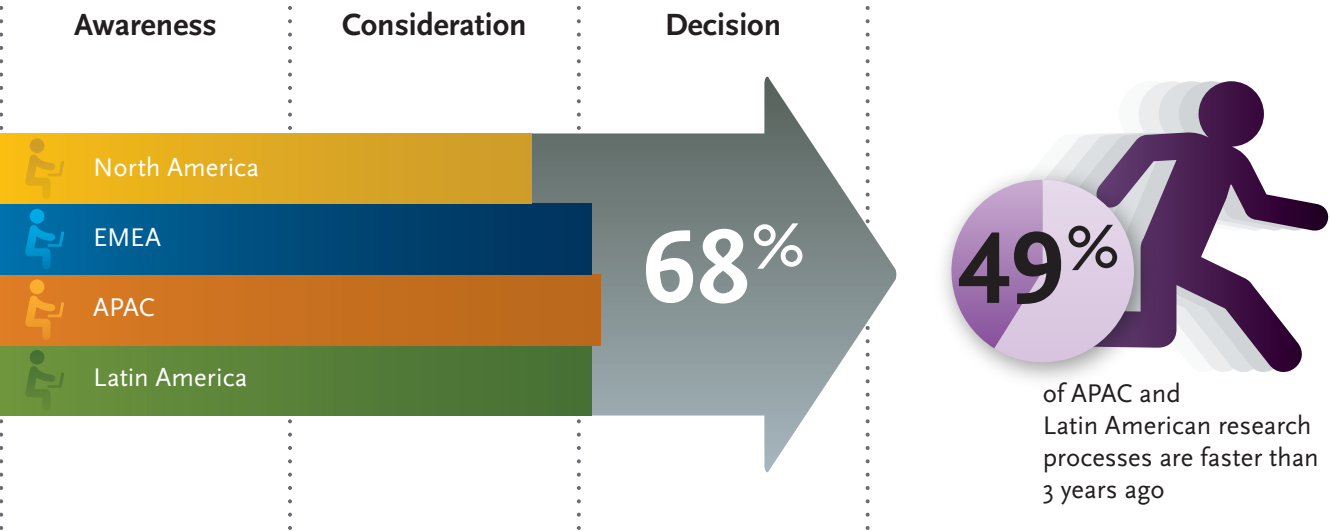
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Technology purchase decisions are made in 6 months or less for both established and emerging markets

When presented with a technology problem or need, IT professionals are tasked with the responsibility of researching solutions, comparing vendors, and making the final purchase decision before implementation. Over the years, the timeframe of this research and purchasing process has begun to shrink and the amount of time for vendors to influence those decisions has been compressed. Globally, 68% of technology purchasing timeframes are six months or less. While this has become standard in North America and EMEA, these timeframes in emerging markets in Latin America and

APAC are significantly shorter than three years ago.

With the increased use of online sources such as search engines, IT publisher and vendor websites, along with new processes implemented internally, technology buying teams are collecting this necessary information faster and more independently—without the need to engage with vendors. Globally, IT professionals prefer to discuss their IT projects with technology vendors following the completion of their initial research and once they have a better understanding of their current technology problem.

68% of technology buy cycles worldwide are 6 months or less

Emerging markets have begun to mature: APAC and Latin American technology buy cycles are now equal to more established markets in EMEA and North America

Awareness   **Consideration**   **Decision**

North America

EMEA

APAC

Latin America

68%

49%

of APAC and Latin American research processes are faster than 3 years ago

What does this mean for you?

Make sure your strategy is keeping pace with technology buyers

In the 2012 *Media Consumption Report*, the majority of vendor sales cycles were not aligned to the buy cycles of technology buyers. This leads to misaligned nurture streams. So while you're busy providing buyers with consideration stage content, they are already building their short-lists. Decisions are being made quickly; make sure your campaigns are always on and providing multiple pieces of content and information in convenient formats for technology buyers to easily access and move rapidly through the buy cycle.

Guide prospects with content, not sales reps

Technology buying teams prefer to conduct research independently and self-educate themselves by consuming the content that is readily available to them. Accelerated buy cycles give vendors less time to influence decisions and fewer opportunities for sales teams to engage prospects. Vendors must provide ample content to fuel buyers' independent research and shepherd them through the buy cycle. Monitor activity and look for signals that indicate when a buyer is ready to engage.

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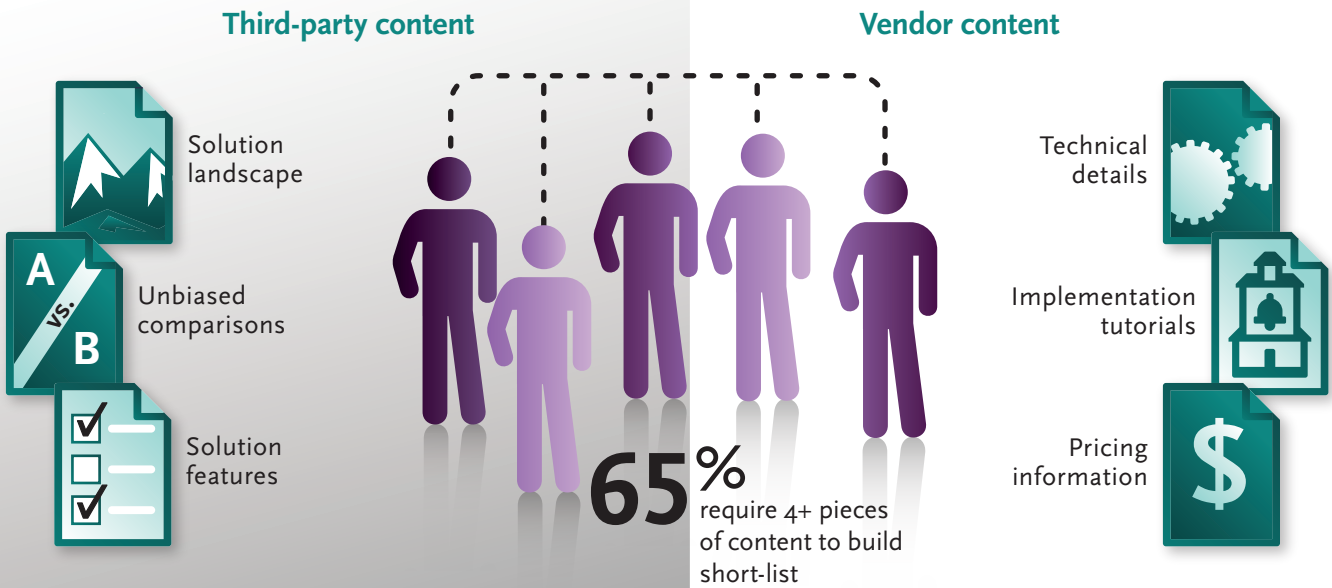
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Multiple pieces of content from both third-parties and vendors provide a complete perspective of solutions across the buy cycle

Within the aforementioned accelerated buy cycle, technology buyers actively seek content to make a well-informed decision related to their IT projects. And they are consuming a significant amount of content before they consider engaging with any specific vendor. In fact, the majority of technology buyers worldwide view a minimum of 4 pieces of content before they begin to build a short-list of vendors.

Buyers noted that they are consulting content from all sources to inform their decision-making. Over 70% indicated that they consult content that is developed by both third-party experts and technology vendors when conducting research. Independent third-party expert content is seen as very valuable because it provides unbiased opinions on the current solution landscape, honest vendor evaluations, and stories of unsuccessful adoption. To attain the complete perspective of which solutions and vendors will best meet their requirements, buyers need the technical information, pricing details and implementation guidance or tutorials that can only be found in vendor-produced content.

The insights provided in vendor content are just as necessary as third-party content for technology buyers to make technology purchases

Third-party content

Solution landscape

Unbiased comparisons

Solution features

Vendor content

Technical details

Implementation tutorials

Pricing information

65% require 4+ pieces of content to build short-list

What does this mean for you?

Create content that fills the gap left by third-party content
Third-party content can provide very useful information for technology buyers to conduct research but it does not provide all the information required to make a well-informed decision. Vendor content is very useful for buyers because it can provide technical, implementation, and cost information not featured in third-party content. Be sure to develop content that provides and emphasizes this information as your prospects move through the buy cycle.

Diversify your content portfolio and use third-party content to your advantage
Knowing that technology buyers consume third-party content to research solutions and evaluate vendors can work to your advantage. Increase your chances of making short-lists and associate your brand with trusted third-party expertise by sponsoring these content types.

Take back some control and tip the scales in your favor with more content and insights
While technology buyers are consuming vendor and third-party content to make a decision, there is no limit on the amount of each they require. Content that allows technology buyers to research independently will be consumed. Produce as much content as you can to outweigh any content they consume and the amount they consume from your competitors and third-parties.

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Technology buyers continue to consume a variety of media types in different stages of the buy cycle

While product literature, white papers and case studies are media types that technology buyers universally find effective throughout the entire research process, there are some that are more effective during particular stages of the process.

In the early stage of the process, when technology buying teams have identified a technology problem and have begun their research, online videos are one of the primary resources utilized worldwide. Other media types found effective in the early stage include: blogs in EMEA and North America; webcasts in APAC; and

virtual trade shows in Latin America.

During the middle stages of the process, buyers in all regions use trial downloads to guide vendor consideration. In addition, North American and APAC buyers consult vendor comparisons, while Latin American and EMEA buyers rely on webcasts to compare solutions.

In the final stage, vendor comparisons are the primary media type to help buying teams worldwide compile their short-lists. Latin American buyers also leverage online demos in the final stage whereas those in APAC, EMEA and North America prefer trial downloads.

Technology buyers consume white papers, case studies and product literature throughout the buy cycle
However, they show strong affinity to certain media types in specific stages

Awareness

- White papers
- Case studies
- Product literature
- **Online videos**

Consideration

- White papers
- Case studies
- Product literature
- **Trial downloads**

Decision

- White papers
- Case studies
- Product literature
- **A vs. B Vendor comparisons**

What does this mean for you?

Media is only as good as the information it provides
While technology buyers have preferences towards specific media types based on their stage of the buy cycle, the type of media is only effective if the information that it features is relevant to their research and is helpful for them during the process. Be sure your media type provides the insight and details your prospects want and require or they will turn to media types from other vendors that do.

Align media types to appropriate stage of buy cycle
Certain media types are seen as more valuable based on the stage of the buy cycle, so make sure your early stage information is featured in the preferred media type in that stage. For example, leverage online videos to help technology buyers learn more about their technology problem and what your brand can do to help address it. Videos that provide late stage information will not be as well-received as white papers, trial downloads, and vendor comparisons.

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English-language content will resonate among non-English technology buyers, except in APAC

IT professionals in non-English speaking countries are in need of content to research solutions and make purchase decisions. While many would prefer content to be localized and translated into their native language, non-English speaking buyers in EMEA and Latin America are willing to consume English-language content provided that it is relevant to their research. In fact, due to the lack of availability, more than 65% of non-English speaking EMEA and Latin American technology buyers download more English-language content than in their native language.
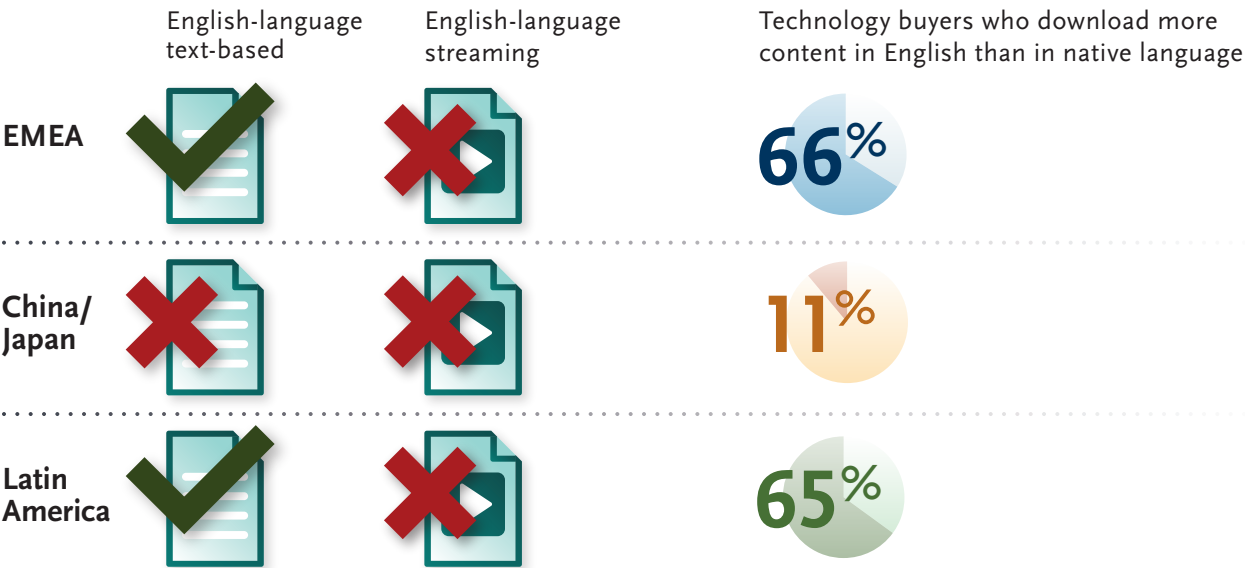
In contrast, non-English speaking buyers in APAC (primarily in China and Japan) are not receptive to content presented in English and prefer to consume content in their native language.

Regardless of region, there are certain English-language content types that non-English buyers are more comfortable with. Text-based content types such as white papers, product literature, case studies and eBooks are easier to consume for non-English speaking buyers. Streaming content types such as online videos, podcasts, webcasts, and virtual trade shows are among those that are less effective.

English content in text-based formats is more preferred than in streaming formats among non-English technology buyers
Chinese and Japanese technology buyers prefer all content to be presented in native language

	English-language text-based	English-language streaming	Technology buyers who download more content in English than in native language
EMEA	✓	✗	**66%**
China/ Japan	✗	✗	**11%**
Latin America	✓	✗	**65%**

What does this mean for you?

Enter international markets right now with successful English content
Do not avoid international markets based on the fear that you have to develop brand new content for non-English speaking prospects. You can effectively launch right now in the majority of international regions. Penetrate these markets, especially in EMEA and Latin America, with your most successful English content pieces and generate international opportunities.

Repurpose content into text-based formats for non-English speaking technology buyers
Just because streaming media types such as webcasts and podcasts may be difficult for non-English speaking buyers to consume when not available in their native language, do not miss the opportunity to leverage its information. Transcribe your webcast or podcast into a blog or white paper, in English, for these prospects to consume.

Translate and localize messaging to penetrate regions and countries more deeply
While English content will allow you to effectively enter non-English speaking EMEA and Latin American markets, translation and localization will eventually be needed to maximize impact. In China and Japan, there is a demand for only translated content, regardless of type or format. Become a more dominant brand in non-English speaking countries by translating and localizing your content and messaging.

Technology buyers expect vendors to be well-informed about their needs prior to their first engagement
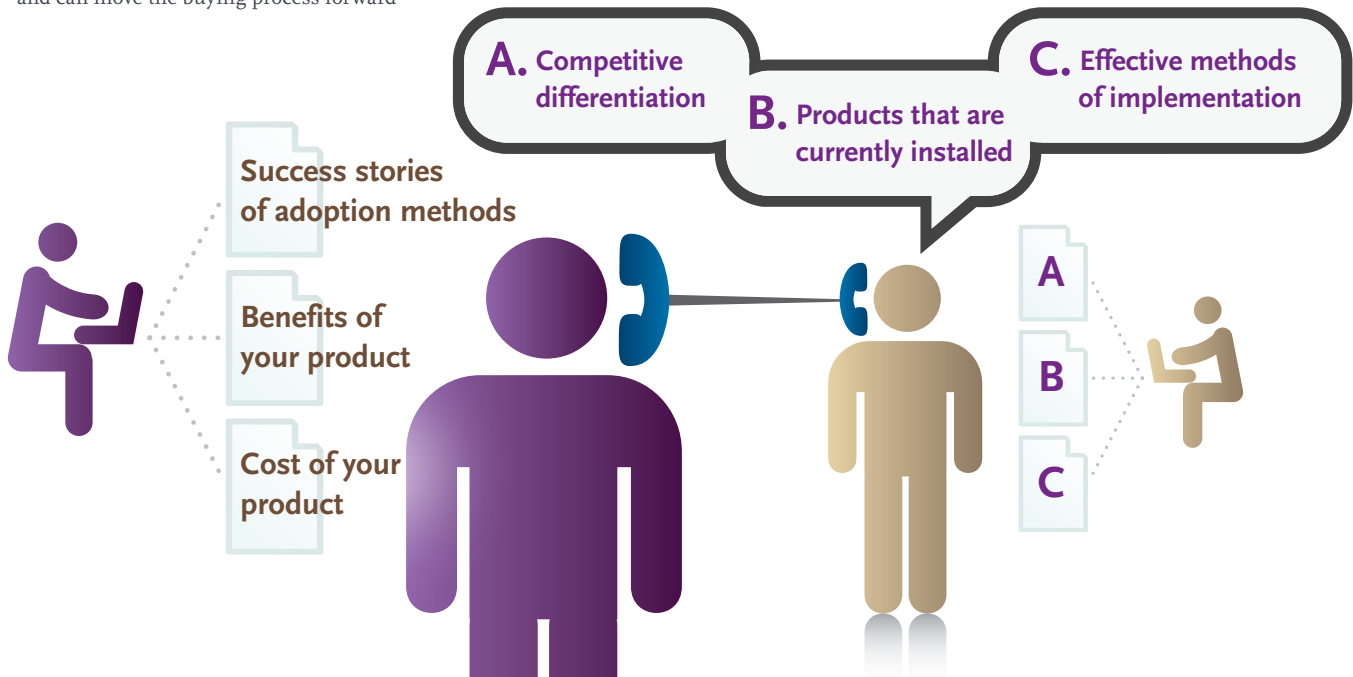
Because of the large amount of content and information technology buyers gather during the research and purchase process, they typically are well informed about the technology vendors prior to their first engagement with those vendor's sales representatives

Prior to this first engagement, technology buyers prefer to have detailed knowledge of the cost of the vendor's solution and the benefits it brings to all other parts of the organization in order to have an effective conversation with the vendor.

For sales representatives, they must do their own research on the buying team and understand their interests and needs in order to have the most effective conversation when the opportunity presents itself. Buyers worldwide believe this initial conversation with a vendor's sales team is most successful when the sales reps have knowledge of their organization and how it can effectively implement and adopt the vendor's solution. Buyers in APAC, EMEA and North America also believe that sales reps should have insight into the other vendors they are considering.

The initial discussion between buyers and vendors must be significant in order to be successful
Both technology buyers and vendors need to do their research about each other so the first engagement is meaningful and can move the buying process forward

Success stories of adoption methods

Benefits of your product

Cost of your product

A. Competitive differentiation
B. Products that are currently installed
C. Effective methods of implementation

A
B
C

What does this mean for you?

Develop content with themes that will influence buyers
Before engaging with any sales reps, buyers want enough information about you and your solution, so make sure you provide it. Your content, in any format, must nurture prospects with the technical information, implementation insights and comparative information Buyers prefer to know in preparation for their first engagement with sales. Without providing this information, your sales teams' engagement attempts will fail and opportunities will be lost.

Identify when prospects are ready to engage with sales
Monitoring the information your prospects consume during the research process can alert you to when they are ready for sales engagement. If a prospect has consumed pieces of content that feature comparative insights, technical details or cost information, they will be most receptive to engagement.

Equip your sales teams with the information required for effective engagements
With much of the research process done independently, the first engagement between your sales rep and the buying team must be as productive as possible. Make sure your sales teams have the full profile of the buying team and their interests. Information about the other vendors they may be considering and customer success stories will help sales make the most out of the opportunity.

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Key takeaways

Maximizing the impact of content marketing and sales strategies worldwide

Content fuels the research and purchasing process

To make a well-informed decision about a technology vendor and solution, technology buyers worldwide turn to various sources, primarily online, to conduct their research. Buyers will download various pieces of relevant content in order to understand the solution landscape independently with limited direct engagement from vendors and their sales teams. The information provided in content pieces such as white papers, case studies and product literature will allow technology buyers and their teams to evaluate solutions and effectively build their short-lists.

Produce content for all members of the global buying team

Technology decision-makers are no longer defined by titles, roles, or location. While each member has a unique perspective when evaluating solutions and vendors, they each influence the organization's purchase decision. This creates a new complexity for marketers when building their nurturing strategies. All team members, from the IT staff member in the organization's regional office to the Senior IT Manager in the corporate headquarters, must be nurtured with content that matches their personas to maximize impact and ensure short-list placement.

Information is more valuable than media format

Helpful information will be consumed by technology buyers when conducting research, regardless of the media format. While white papers and product literature are viewed as the most effective media types when conducting research, technology buyers are most interested in content that features comparative, technical, and implementation insights, regardless of format. Marketers should be more focused on providing the content their prospects want, and less about the format it is featured in.

When it comes to content, quantity *and* quality matter

While technology buyers require a variety of content to conduct their independent research, the content needs to feature the information that they find useful, regardless of who produces it. Technology buyers will consult content that is produced by both third-party experts and vendors if it has the information required to gain a complete perspective on the solution landscape and move through the research and purchasing process.

Leverage English text-based content to enter select non-English markets

Non-English speaking markets, especially in EMEA and Latin America, desire informative content that can help them make a well-informed purchase decision regardless if it is in English or translated into their native language. However, the content must be text-based to be most effective as non-English buyers will be able to consume it at their own pace. Marketers can leverage their successful English text-based content pieces in these markets to begin building brand awareness. For APAC, specifically China and Japan, all content should be translated in order to maximize effectiveness.

First engagement requires well-informed sales reps to be productive

Just as technology buyers conduct their research and gain an understanding of a technology vendor prior to their first engagement with its sales teams, they expect the vendor to conduct their own research as well. Understanding which other vendors the prospect may be considering and how their organization can effectively adopt the solution will make the first engagement most effective. Successful marketers will need to equip their sales reps with this intelligence.

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About TechTarget

TechTarget (NASDAQ: TTGT) is the online intersection of serious technology buyers, targeted technical content and technology providers worldwide. Our media, powered by TechTarget's Activity Intelligence™ platform, redefines how technology buyers are viewed and engaged based on their active projects, specific technical priorities and business needs. With more than 100 technology specific websites, we provide technology marketers innovative media that delivers unmatched reach via custom advertising, branding and lead generation solutions all built on our extensive network of online and social media.

TechTarget is based in Boston and has locations in Atlanta, Beijing, Cincinnati, London, Munich, Paris, San Francisco, Singapore, and Sydney. For more information, please visit: *www.techtarget.com*.

Resources for marketers

Compiled of best practices and white papers, market research reports and ROI driven case studies, TechTarget's Resources for Marketers provides technology marketers the information and insight they need to enhance their strategies.

- Understand international technology buyers and how to enter global markets effectively
- Uncover where IT budgets are being allocated year by year
- Discover the latest strategies your marketing peers have leveraged to deliver higher-quality leads
- And much more

Visit *www.techtarget.com/resources* and understand the IT buying market and how to appropriately engage with the IT audience for optimal ROI.