

Global Media Consumption Trends:

Understanding Regional Distinctions of How IT Buyers Research Online

December 2010

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Executive Summary

This latest iteration of the TechTarget Media Consumption Research Study was designed to accomplish the same goals as its predecessors—to determine the extent to which information technology (IT) professionals around the world interact with the Internet; and the particular preferences they have for specific online content types and information sources based on what’s available to them and the stage they are in related to their buying process.

One of our first goals was to establish the actual usage trends of online content globally compared to what we see here in the United States. Whereas this study is meant to be especially helpful to US-based global marketers in identifying universal online consumption trends, as the findings reveal, it is not always easy to do. In some cases there are huge differences region to region in how online media is consumed by IT professionals—differences that the marketer needs to pay attention to.

However, there are some universal trends that emerge and parallel what we see here in the States and they are noted.

The Internet is the primary destination and source for all research done by IT professionals. It is also the preferred method by which IT professionals expect marketers to communicate on the value of their brand and to capture IT prospects as leads. Only Japan and France deviate from this, with respondents showing a continuing preference for print and events. As we’ve come to recognize, print publications and live events were the traditional, top outlets for IT professionals, but over the last decade their ranking has been usurped by the Internet.

*The Internet
is the primary
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Another noteworthy trend is that macroeconomic factors have impacted the research habits of the IT community. This is demonstrated by a common desire to get information online faster and for content that showcases product reliability. Interviews with panels of IT professionals have confirmed that these requests are directly related to IT teams being challenged to do more with less. They want efficient and easy access to online information as well as content that is credible. This translates to the need for vendors to provide dependable technical content and case studies of their solutions.

The demand for credibility also shows itself in the immense regard IT professionals, across all regions, report having for online social networks and online IT communities. We know from previous studies and subsequent conversations with IT pros that this has everything to do with a basic trust in the advice available from their peers online and that although other sources carry varying degrees of credibility, there is also some skepticism attached to anything coming from a third party.

As with our nine previous media consumption studies, this one confirms the strong relationship between the stage the IT professional is in related to their buying cycle and the specific content they need. Again, there are some noteworthy deviations, but these trends still emerge:

- Demand for editorial/educational material during early stage
- Streaming media during consideration stage
- Vendor comparisons and downloads during end stage

The demand for credibility also shows itself in the immense regard IT professionals, across all regions, report having for online social networks and online IT communities.

Objectives

- Using the United States as a benchmark we determine similarities and dissimilarities in online content consumption patterns of IT buyers based on geographical region.
- To generate Best Practice advice for global marketers by identifying where a common approach may be effective and where a customized approach is necessary based on a particular region.

Key Findings

- The Internet is universally used for IT research in all regions of the world
- Regardless of country, IT research is predominantly conducted online by teams of 2–7
 - A strong exception to this trend is seen in regions that have more than 10 members on a team*
- White papers are not the top content type around the world
 - In certain regions vendor comparisons and trial downloads top the list for most “frequented” or “downloaded”*
- Search, vendor websites, and IT publishers were the most popular sources on a global scale
- Most regions cite 2–5 months as the typical timeframe for a buying cycle
- In several regions, sponsored literature takes the number one slot for most downloaded content
 - This could be reflective of limited choices and what is actually available in that region vs. what is most needed or requested*

Demographics

Research methodology

- 2,425 completed survey respondents
- Fielded throughout July 2010
- Run in 6 languages and localized by market
- Online survey fielded through SurveyGizmo.com
- Respondents part of opt-in TechTarget IT Research Panel

Roles/titles within organization

- Senior management: 8%
- Management: 23%
- Developer/administrator: 22%
- Other IT staff: 47%

Company sizes

- Small: 26%
- Midsized: 31%
- Enterprise: 43%

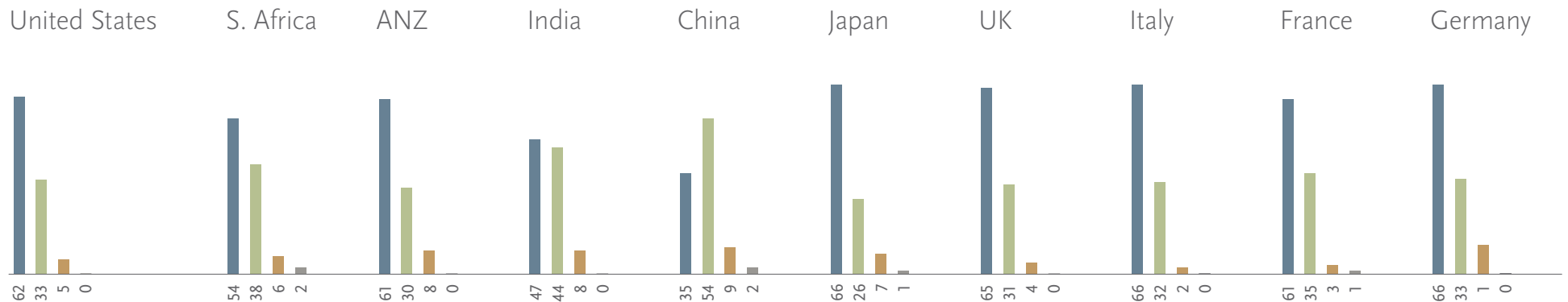
Global regions covered

- United States
- United Kingdom
- France
- Germany
- Italy
- South Africa
- Australia/New Zealand
- India
- China
- Japan

The Internet is universally used during all stages of the IT research process.

In most regions, over 90% of researchers cite “Always” or “Frequently” using the Internet when researching IT solutions.

Question: Based on your role during the decision-making process, how often do you use the Internet to research information on technology solutions?



Always %
Frequently %
Sometimes %
Rarely %

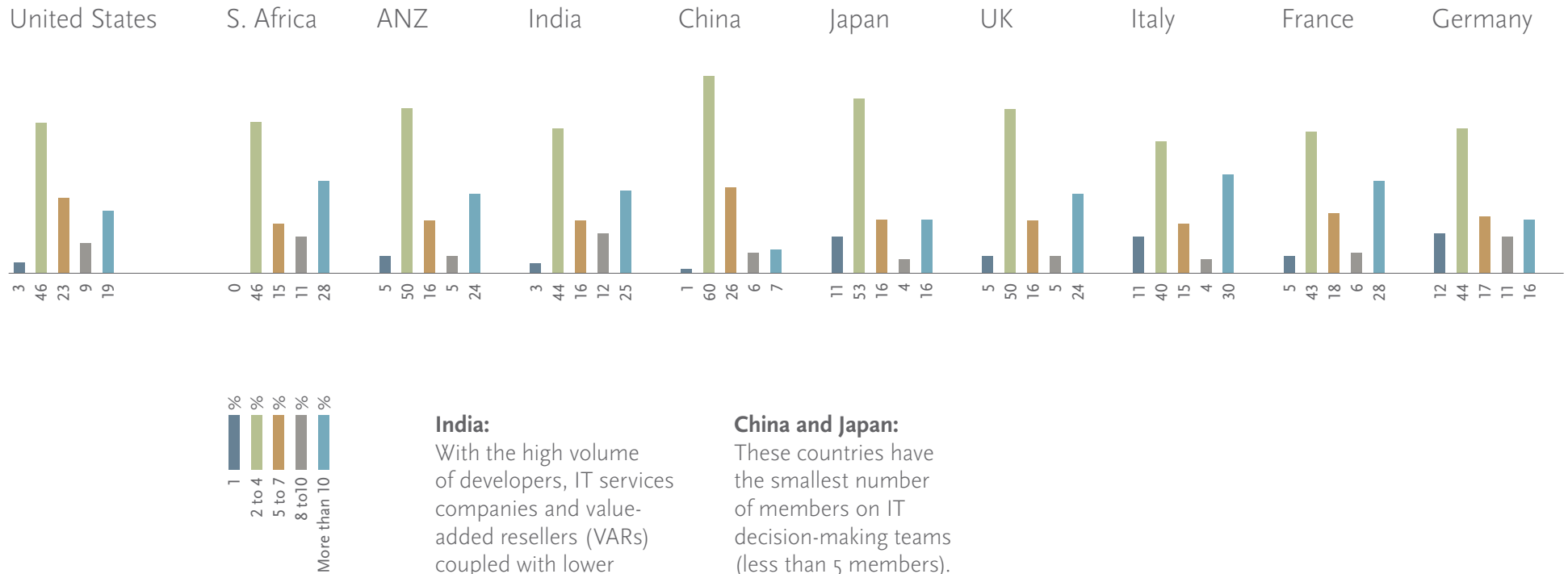
S. Africa, India and China:

Although tracking lower for “Always”, these countries still come in around 90% for “Always” and “Frequently” using the Internet.

IT buyers everywhere are working in decision-making teams.

Globally, IT buying teams tend to consist of 2 to 7 people with some countries having a larger concentration of teams with more than 10 members.

Question: How many people are typically involved in the information technology research and decision-making process?



India:
With the high volume of developers, IT services companies and value-added resellers (VARs) coupled with lower employment costs, IT decision-making teams skew larger in India.

China and Japan:
These countries have the smallest number of members on IT decision-making teams (less than 5 members).

Macroeconomic factors have impacted the way in which technology research is conducted on the Internet by different regional markets.

The majority of regions share the need to access information more efficiently and for reliable content.

Question: How has your online research process changed during these hard economic times?

	United States	UK	ANZ	India	Japan	France	Germany	Italy	S. Africa	China
Access information faster	42%	43%	49%	56%	36%	45%	30%	32%	42%	48%
Need content showcasing reliability	39%	37%	35%	49%	35%	47%	34%	54%	54%	60%
Spread research across team	29%	21%	23%	26%	10%	20%	14%	23%	28%	27%
More diverse content needs	25%	26%	27%	36%	29%	21%	24%	21%	25%	61%
More receptive to phone calls	6%	7%	8%	25%	20%	8%	5%	13%	11%	25%

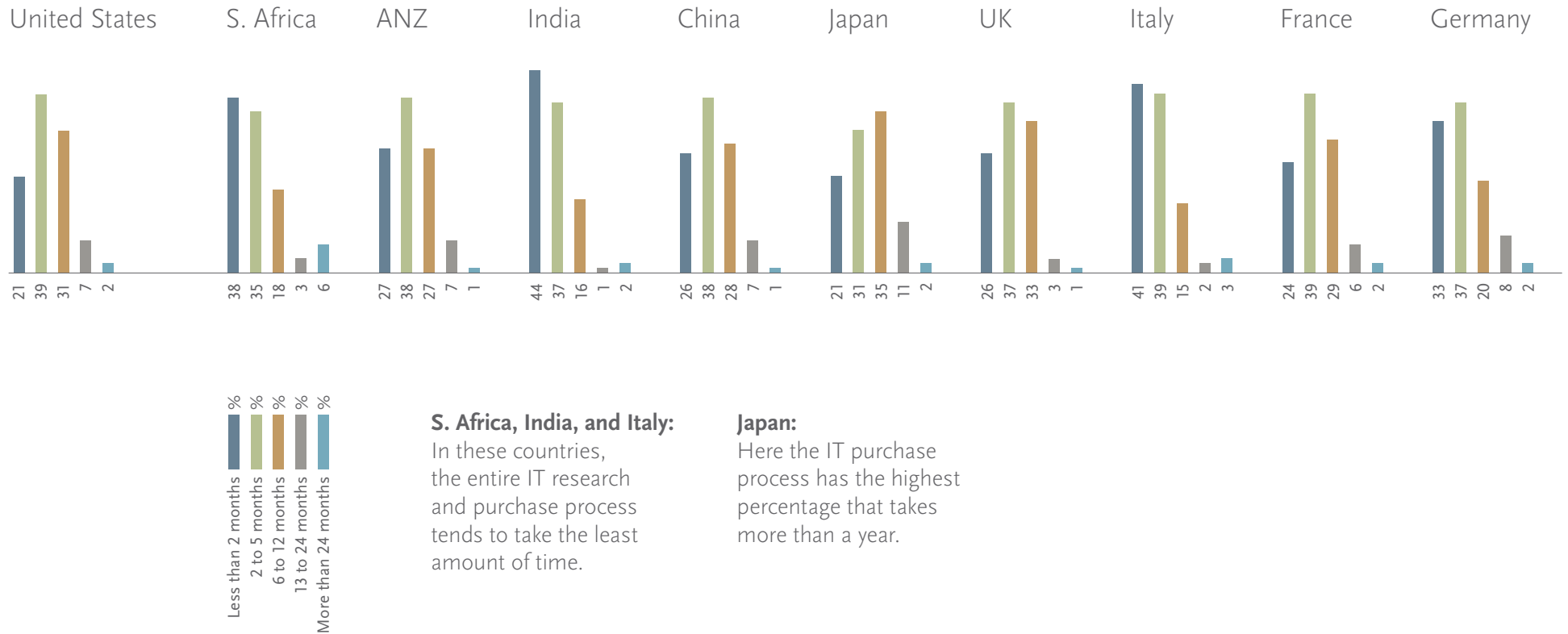
United States, UK, ANZ, India and Japan: IT decision-making teams have less time to research enterprise technology solutions and thus need the right information, faster.

China: Since marketers haven't been as willing to translate quality technical content, IT professionals in China don't have as much information to help them make informed decisions.

While the majority of regional markets see an IT purchase process of 2 to 12 months, timeframe averages can be longer in some countries.

Most regions parallel the buying cycle of the United States.

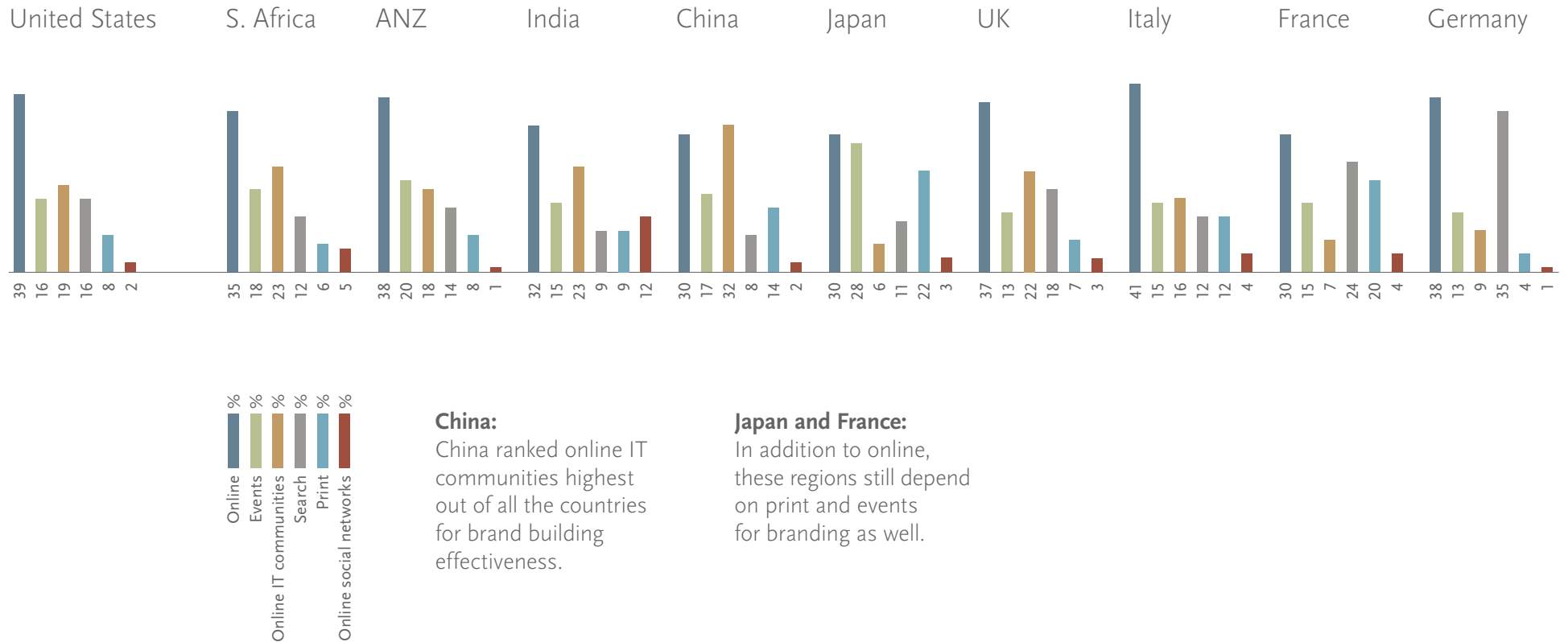
Question: On average, how long is your timeframe from identifying your problem to making your purchase decision?



Reception to brand building is most popular on traditional websites and online IT communities.

Several regions turn to the web for branding as strongly as the United States (S. Africa, ANZ, Italy and Germany).

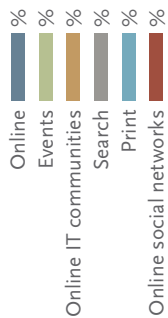
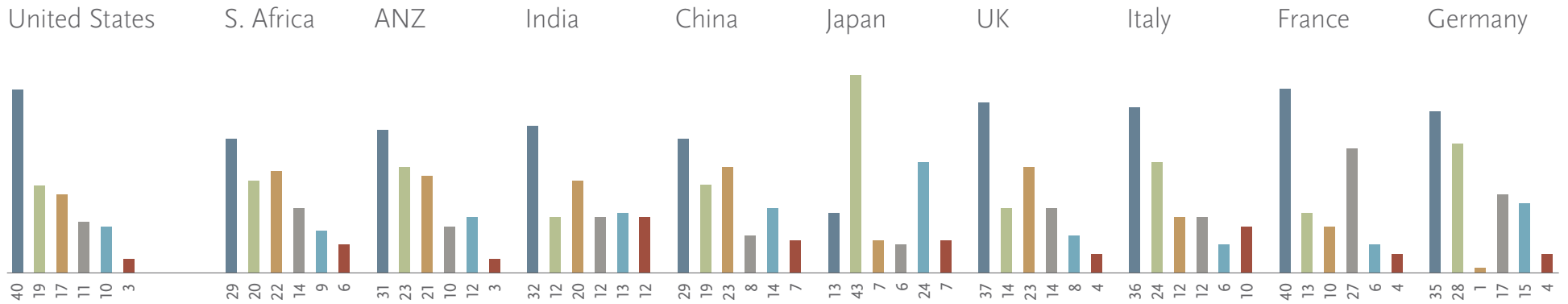
Question: If IT marketers wanted to communicate their brand's value message to you, in which form would you be more receptive to hearing their messages?



Nearly all global regions prefer traditional online websites for lead generation.

As in the United States, most regions use online predominantly—followed by events.

Question: If IT marketers wanted to capture profile information from you through registration, in which form would you be more receptive to hearing their messages and offers?



Japan:

Due to the high level of protection around personal information in Japan, events are seen as the primary media for lead generation because there are no privacy policies/personal data handling issues. Online lead generation is still becoming more main-stream here.

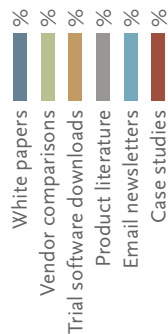
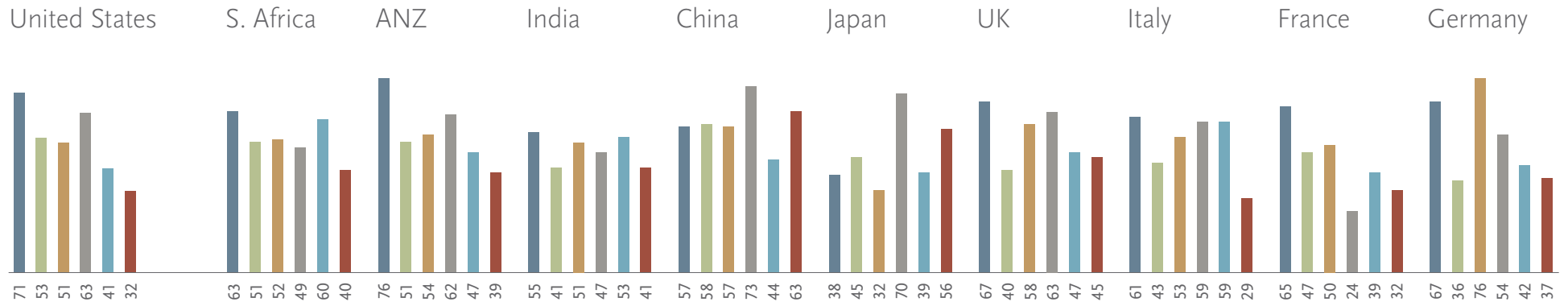
Germany:

Unlike most other countries, IT professionals are not willing to complete registrations in online IT communities in Germany.

White papers are not universally the top content type.

In most countries, product literature and trial downloads make the top 3 list of most effective content type.

Question: In the past three months, which of the following online content types have you used to get information on enterprise technology solutions?



United States, China and France:
These countries show a bias for vendor comparisons as well.

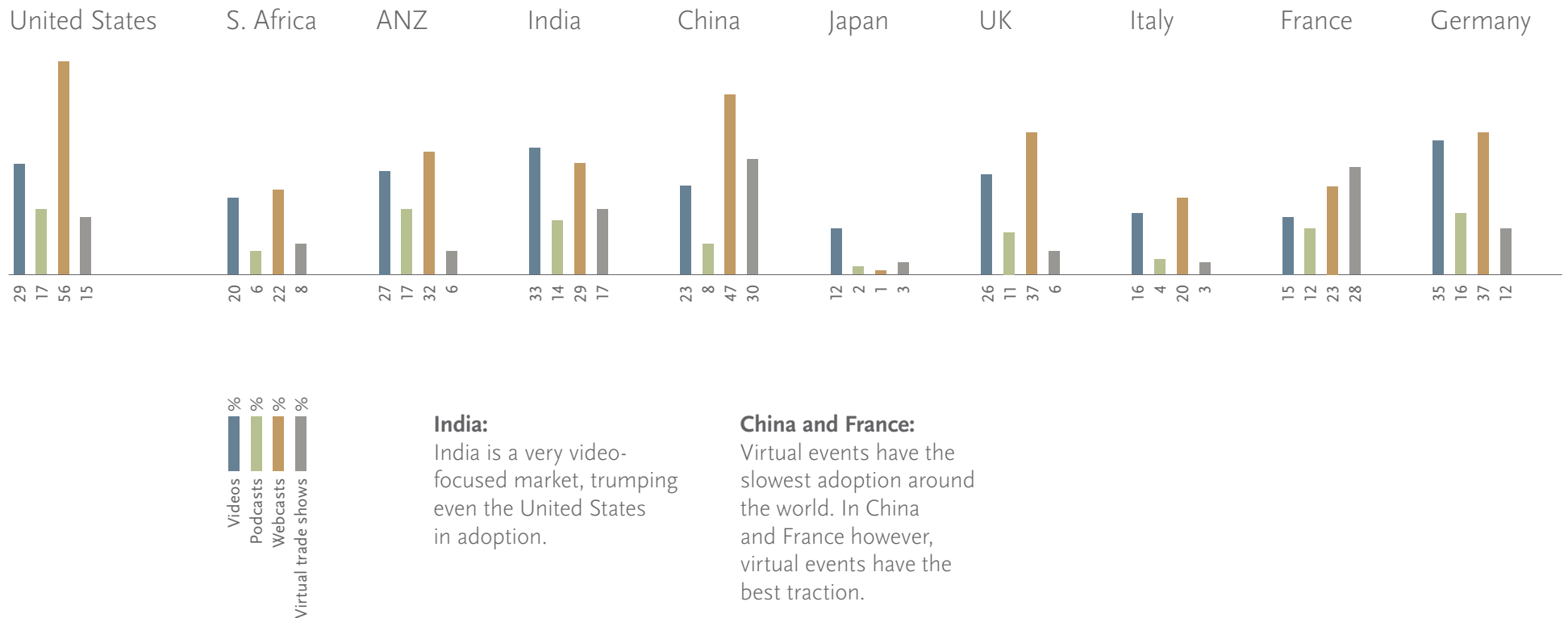
China and Japan:
In these countries, product literature, followed by case studies and vendor comparisons, top the list. Lack of localization has likely had a big impact, lowering the consumption of white papers in these non-English speaking regions.

Germany:
Next to white papers, trial software downloads are in high demand.

Streaming media, like podcasts, webcasts, videos and virtual events, often appear lower on the usage lists.

This lower consumption may be due to the lack of adoption by the marketer community or the overall complexity with production. The exception to this is the United States, with a bias towards webcasts.

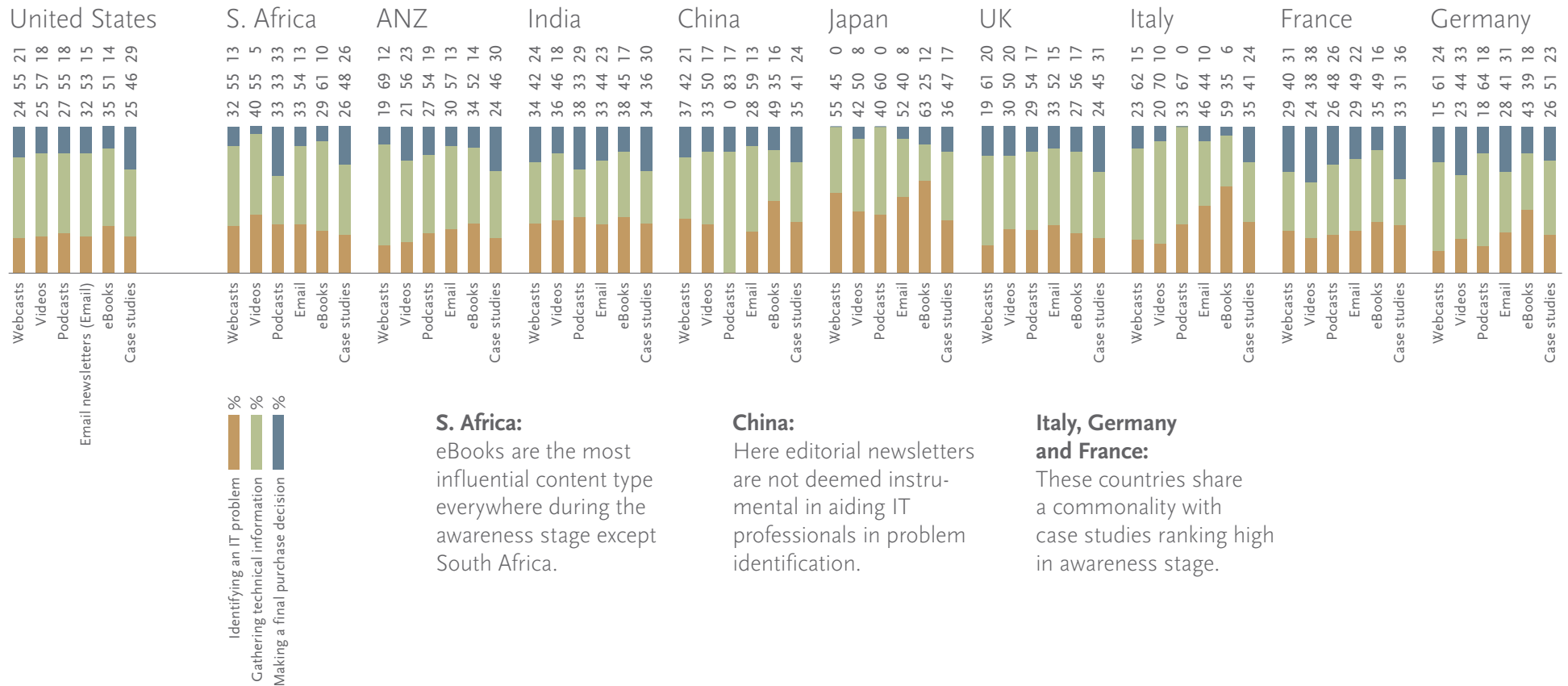
Question: In the past three months, which of the following online content types have you used to get information on enterprise technology solutions?



Editorial content plays the most instrumental role in helping IT professionals identify problems.

Most countries indicated that eBooks, webcasts, email newsletters, videos and podcasts are predominantly effective in early stages.

Question: At which stage(s) of the IT buying process are these specific online content types most effective at reaching IT buyers?



S. Africa:
eBooks are the most influential content type everywhere during the awareness stage except South Africa.

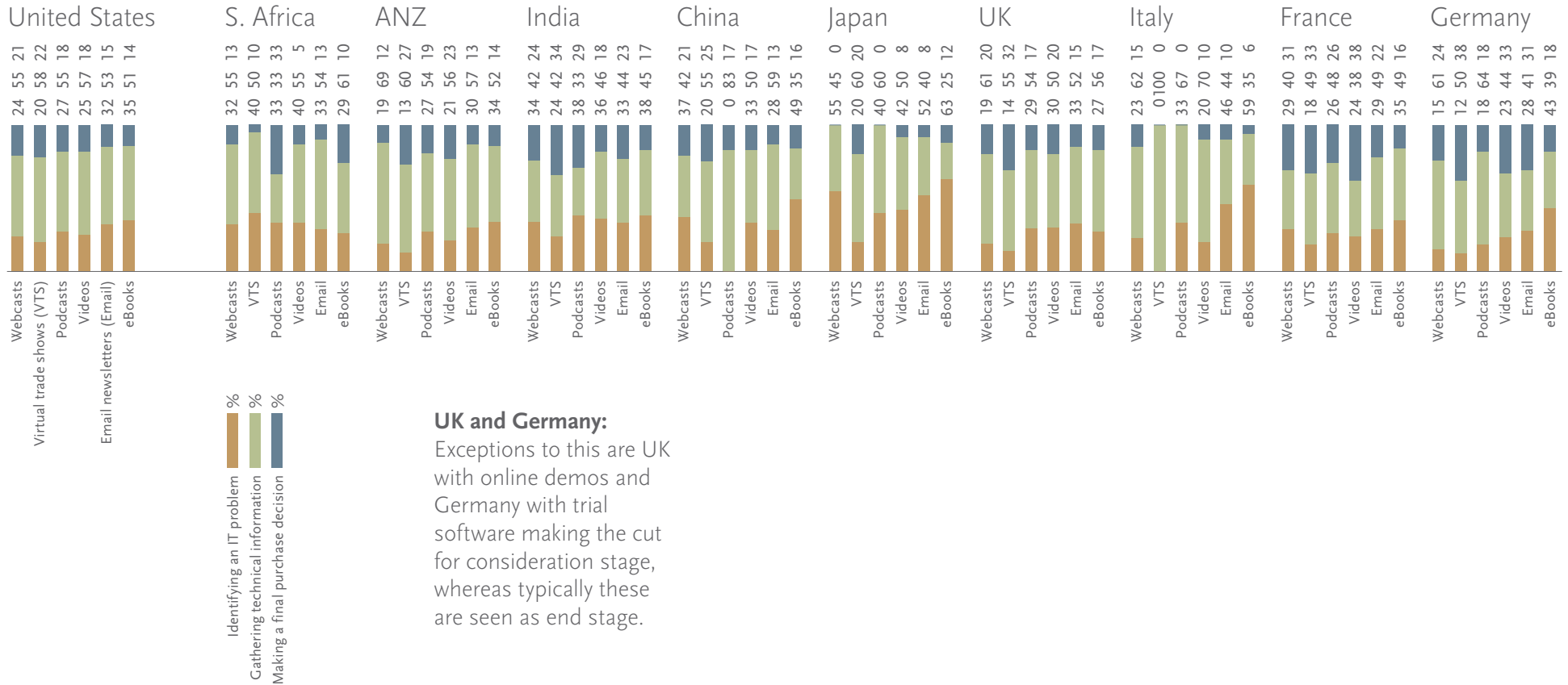
China:
Here editorial newsletters are not deemed instrumental in aiding IT professionals in problem identification.

Italy, Germany and France:
These countries share a commonality with case studies ranking high in awareness stage.

Streaming media are referred to most during the consideration stage, along with email newsletters.

These content types require an audience to become more engaged with the content as well as the sponsor behind the media.

Question: At which stage(s) of the IT buying process are these specific online content types most effective at reaching IT buyers?

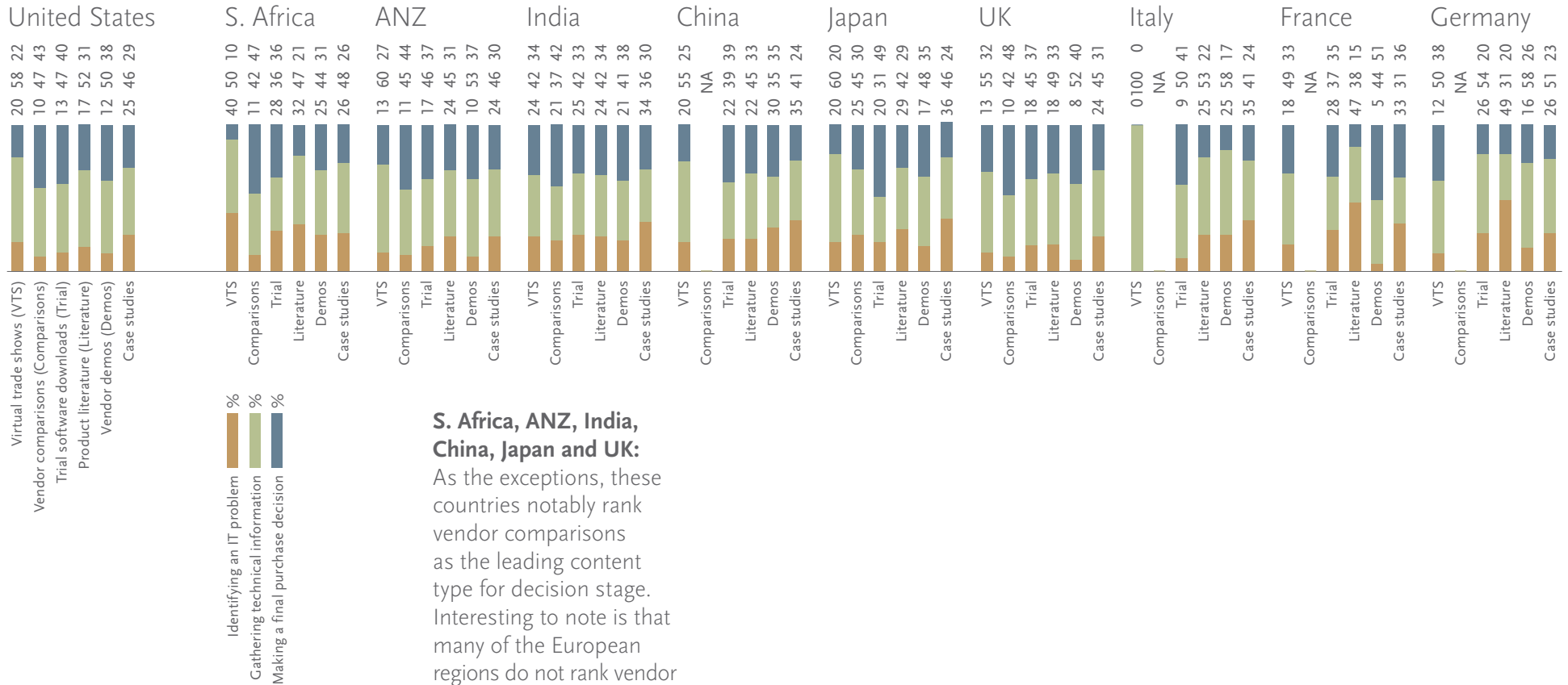


UK and Germany: Exceptions to this are UK with online demos and Germany with trial software making the cut for consideration stage, whereas typically these are seen as end stage.

There is a global consistency in content types referenced in decision making stage for IT buyers.

The top tier: vendor comparisons, vendor demos and trial downloads—Second tier: virtual trade shows, case studies and product literature.

Question: At which stage(s) of the IT buying process are these specific online content types most effective at reaching IT buyers?



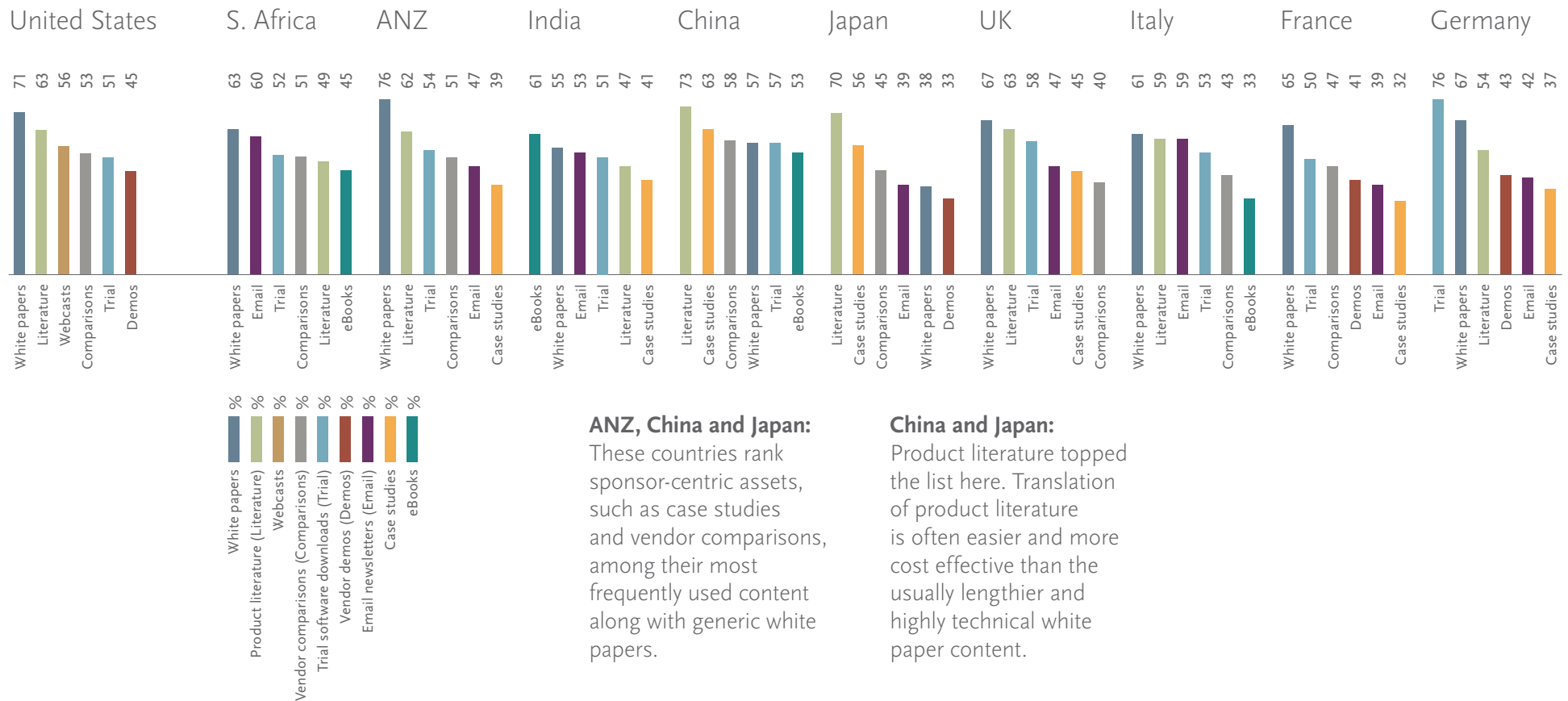
S. Africa, ANZ, India, China, Japan and UK:

As the exceptions, these countries notably rank vendor comparisons as the leading content type for decision stage. Interesting to note is that many of the European regions do not rank vendor comparisons as a top media type for this stage.

Most global regions have a fairly distributed favorability ranking for all content types.

Consumption preferences while varied by country may also be tied to other drivers for the IT buyer, such as personal preferences or stage in IT buying process.

Question: In the past three months, which of the following online content types have you used to get information on enterprise technology solutions? (Top 6 shown for each country)



ANZ, China and Japan:

These countries rank sponsor-centric assets, such as case studies and vendor comparisons, among their most frequently used content along with generic white papers.

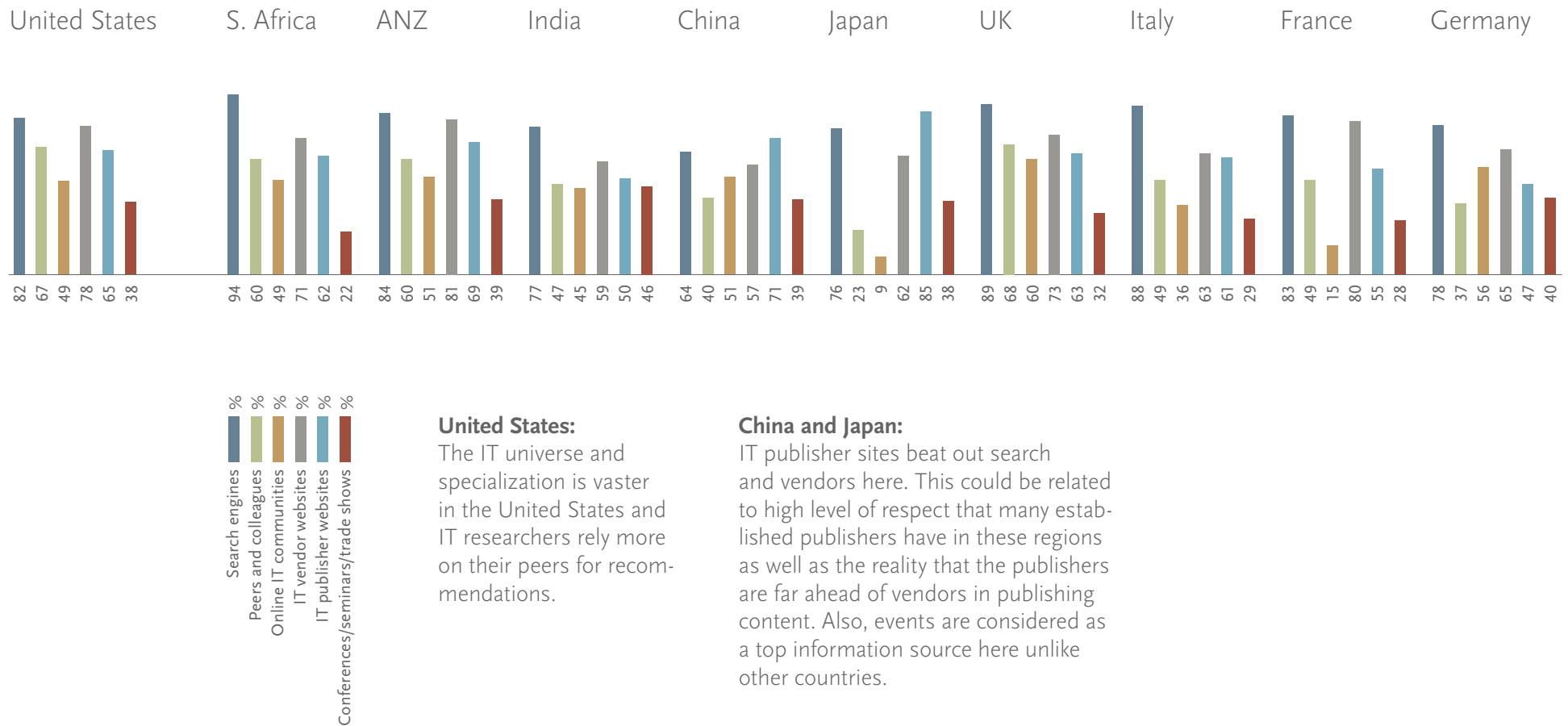
China and Japan:

Product literature topped the list here. Translation of product literature is often easier and more cost effective than the usually lengthier and highly technical white paper content.

Search, vendor websites and IT publishers were the most popular information sources on a global scale.

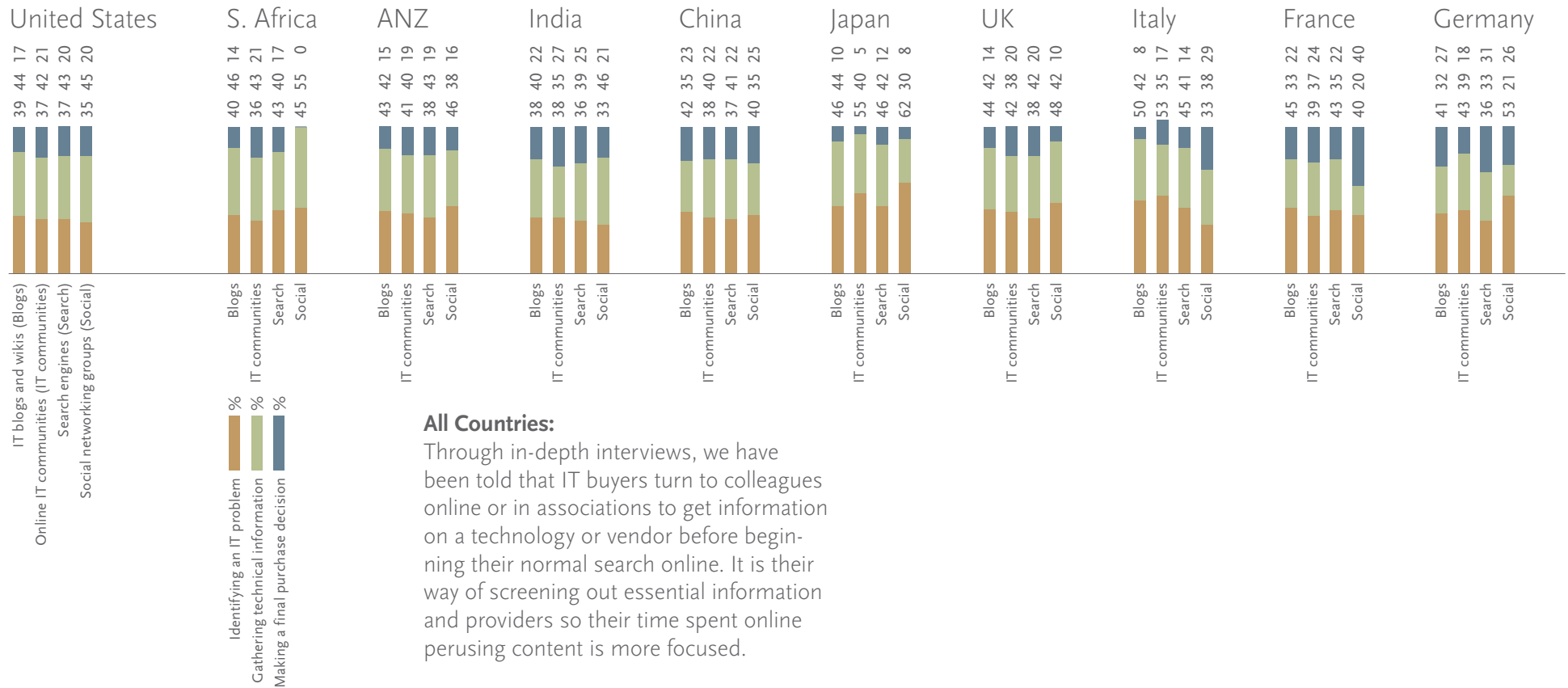
Yet at a country level, other information source popularity varies.

Question: In the past three months, where have you gone for information on enterprise technology solutions?



Social media and search are the most influential information sources when IT buyers are first researching IT problems.

Question: At which stage(s) of the IT buying process are these specific online information sources most effective at reaching IT buyers?



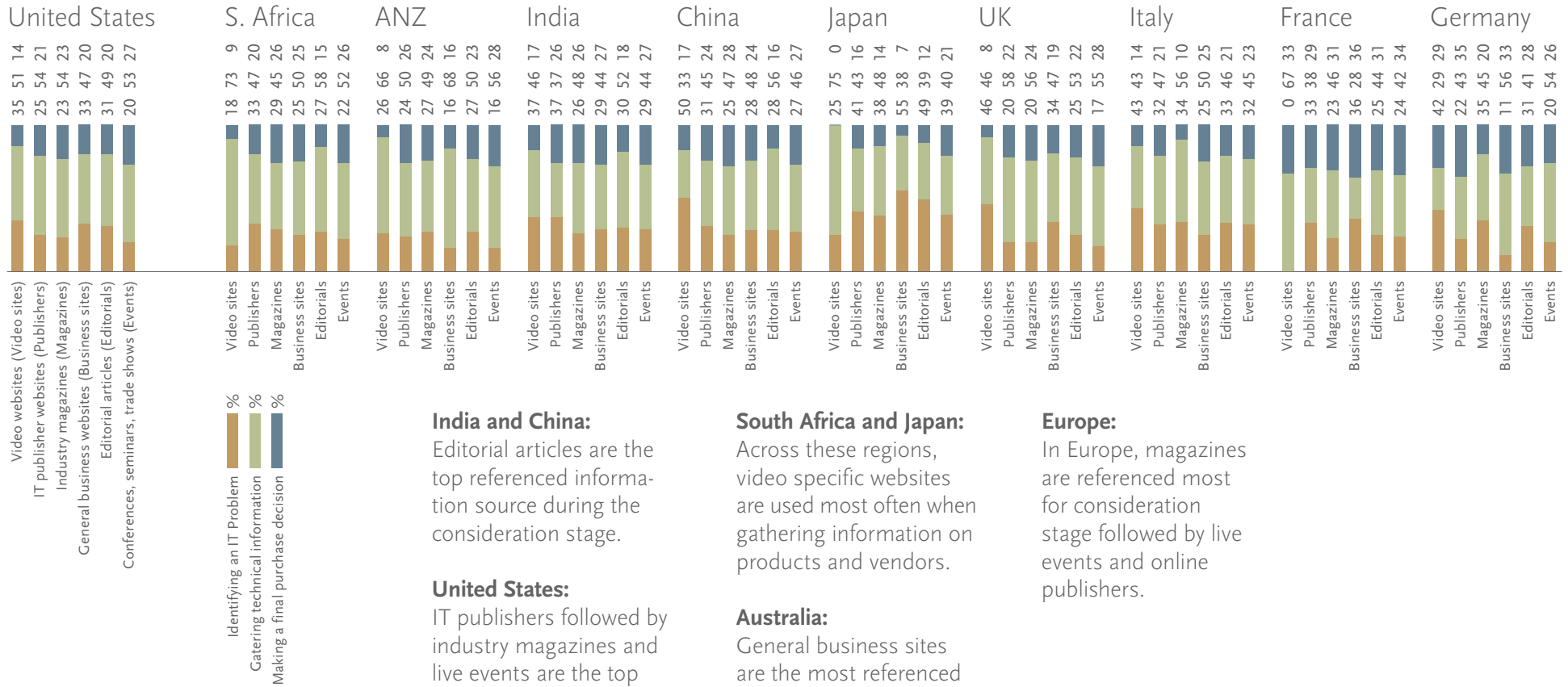
All Countries:

Through in-depth interviews, we have been told that IT buyers turn to colleagues online or in associations to get information on a technology or vendor before beginning their normal search online. It is their way of screening out essential information and providers so their time spent online perusing content is more focused.

When IT buyers are gathering information on vendors they seek third-party background information or vendor validation.

Independent content from IT publishers, editorial articles and industry publications remain consistent along with video websites noted as most influential during consideration stage.

Question: At which stage(s) of the IT buying process are these specific online information sources most effective at reaching IT buyers?



India and China: Editorial articles are the top referenced information source during the consideration stage.

United States: IT publishers followed by industry magazines and live events are the top outlets for IT buyers in their consideration stage.

South Africa and Japan: Across these regions, video specific websites are used most often when gathering information on products and vendors.

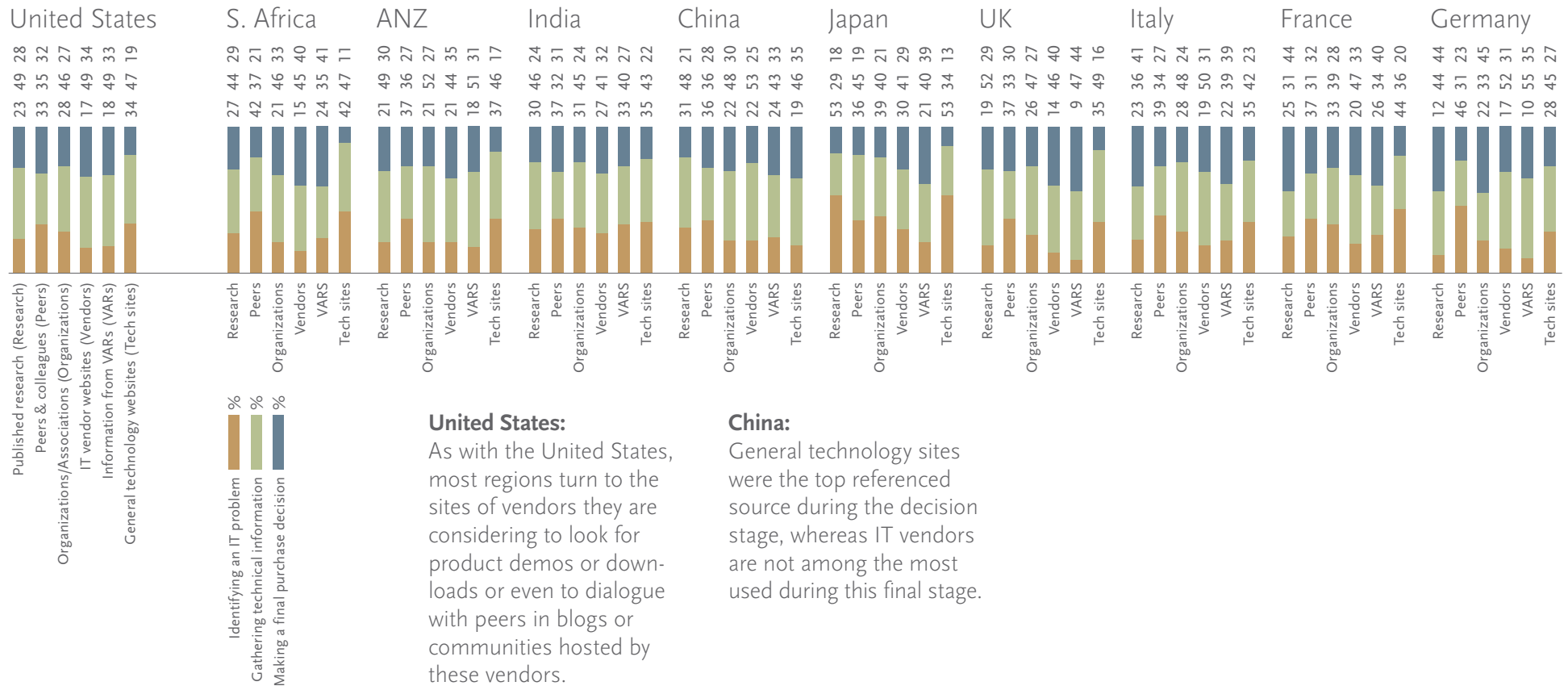
Australia: General business sites are the most referenced medium when researching products and vendors.

Europe: In Europe, magazines are referenced most for consideration stage followed by live events and online publishers.

When IT professionals are compiling their short-lists and making final decisions, they generally reference IT vendor sites and information from VARs.

At this point in their buying process, IT buyers are receptive to hear what other users have to say about possible vendors and are more willing to hear from trusted vendors and their sales organizations.

Question: At which stage(s) of the IT buying process are these specific online information sources most effective at reaching IT buyers?



United States: As with the United States, most regions turn to the sites of vendors they are considering to look for product demos or downloads or even to dialogue with peers in blogs or communities hosted by these vendors.

China: General technology sites were the top referenced source during the decision stage, whereas IT vendors are not among the most used during this final stage.

Conclusion

- Marketing budgets need to accompany the shift in research habits suggesting that marketers around the world need to invest in building diverse content portfolios and placing this content in varied information sources that IT professionals frequent.
- Global marketers, in particular, need to pay attention to the preferences IT professionals have in specific regions and beef up their arsenal of content assets to match the demands of the regions they are marketing to.
- Whereas this suggests content syndication exercises are an effective way to expose multiple media versions of content to various audiences, one approach will not suffice to cover all regional distinctions and preferences.
- Specific regions of the world will need campaigns and assets that reflect the preferences of that region based on the stage the IT buyer is in.
- This, in turn, points to the need for specialized and localized content creation based on the receptiveness (or lack of it) to non-local language content.
- There are needs for content creation/technical education in markets where English language material is least likely to be consumed (China/Japan). Where this isn't possible, alignment with editorial content, including locally produced and translated content, could make a difference in early-stage influence.

- Marketers should translate or create product spec sheets so they are readily available in local language. However, we see a real opportunity for marketers to create educational material for certain markets that talk about technical approach or problem-solving options without directly advocating for their solution set.
- Noteworthy is that with the exception of countries like Germany and Australia where vendor comparisons are not allowed, vendor comparison content is in high demand in the majority of regions and, as we have found here in the States, is the content that is especially influential in end stages. Comparing vendors is a necessary step for IT professionals and any help they can get is much appreciated as it saves them valuable time.
- In countries where comparisons aren't allowed third party analysis is a good substitute.
- Overall, the Internet is the best information source for all IT professionals around the world. It is also the best investment for IT marketers to cultivate relationships with IT professionals who are seeking advice and help on which brands or solutions to purchase.

About TechTarget

TechTarget (www.techtarget.com) (NASDAQ: TTGT) is a leading global technology media company with more than 90 technology-specific websites, 9 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.

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