

TechTarget 2009 Media Consumption Report: Mindset of the IT Pro During the Recession



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Key Findings

Summary

This study of more than 1400 IT professionals confirms that IT buyers continue to rely on the web and countless online content assets related to where they are in their purchase cycle. Consistent with previous studies, 99% of our respondents indicate they rely on the web and search engines as their primary activity for information gathering. As a result, it seems logical that there should be a complementary relationship between a comprehensive keyword buy and a fully stacked arsenal of content. Since individual IT buyers are members of buying teams searching and downloading content in parallel and/or at different times, there is potentially no end to the extent of their media consumption when it comes to an online environment. In fact, based on in-depth analysis of IT buyers actual perusal and consumption of TechTarget information sources, we have come to recognize that most IT professionals are “hyperactive” in their interaction with the web.

Impact of “Recessionary Times”

Indicative of how the recession has impacted their online research process, IT buyers are asking for content that showcases reliability and proven product success, which reinforces why they also indicate case studies and vendor comparisons as a favorite for overall preferences. They are asking that their research process be faster and more efficient, implying that marketers and online publishers alike, must think of what to do to accelerate their search process.

This study also confirms that IT buyers rely on myriad online content types during their purchase process and that they have different preferences for different assets based on where they are; identifying an IT problem, gathering technical information, or making a short list or decision for a certain vendor solution.

The implications around these findings suggest marketers should have a comprehensive content strategy that maps to the exact stage the buyer is in and to the goals of the

Key Findings (continued)

IT vendor. Assets that serve to generate leads are different from assets that create awareness around a brand, and this study strongly validates that very specific assets can influence an actual purchase decision.

In terms of overall effectiveness, peers and colleagues beat out all other sources for delivering information needed to make informed decisions. This finding remains consistent with our previous studies and other third party research on IT buyer preferences.

Lastly, this study validates that online media serve as an environment equally capable of building awareness for a vendor's solution as it does for creating demand for its products. It is this unique property of online media that makes it the most efficient yet scalable marketing campaign; a true balance of branding and lead generation.

Highlights

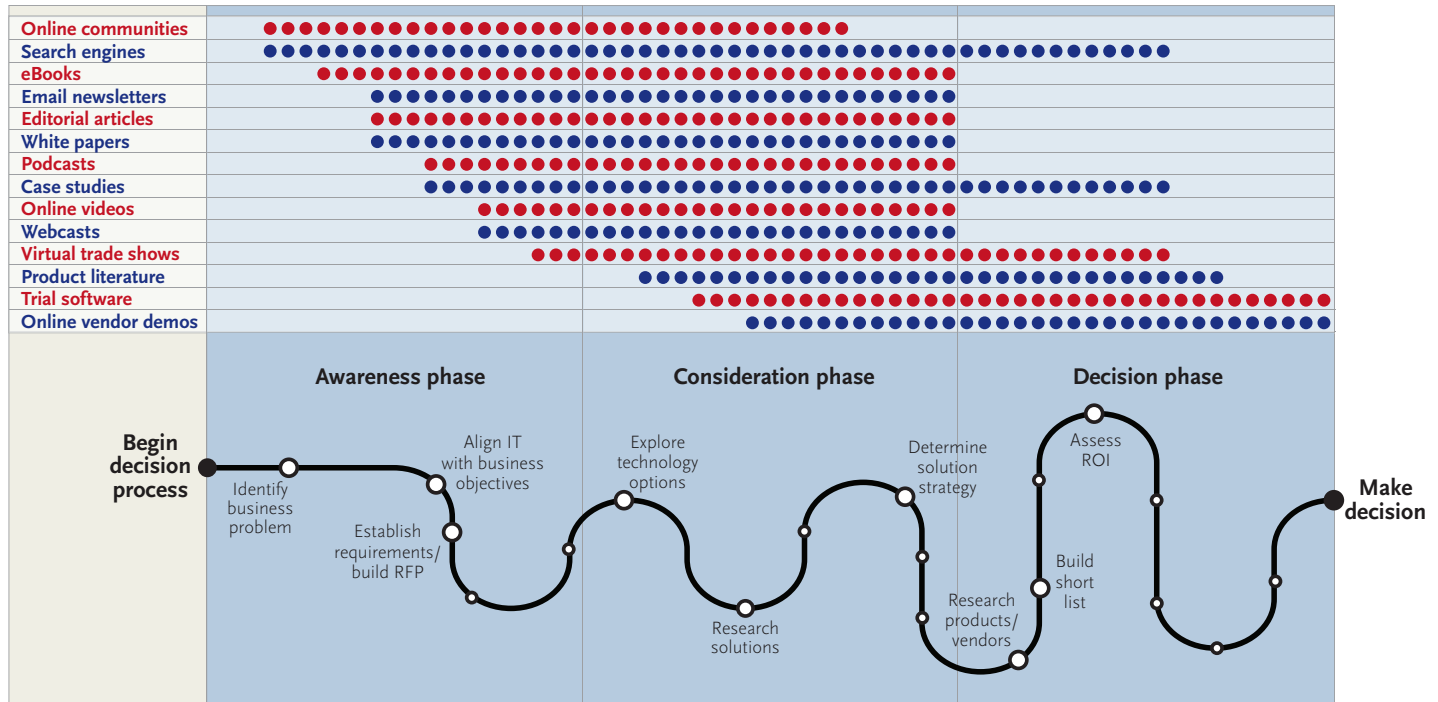
Specifically, The following data points are the highlights from this study:

- During the early stages of their buying process, IT buyers turn to ebooks, emails and editorial articles to help them solve problems.
- Some of the newer media types, such as online videos and virtual trade shows, rank high when IT buyers are gathering technical information.
- Media such as trial software, vendor demos, vendor product literature and case studies are used predominantly at end stages of the buying process. 88% of IT buyers indicated they will evaluate between 2-5 pieces of trial software during the evaluation periods.
- IT buyers indicate that online is where they are receptive to both branding messages and lead registration.

Key Findings (continued)

- Respondents indicate that most of their time online is spent researching and shopping the competition, and that the windows of opportunity for early stage and late stage activity are much shorter.
- Specific to trial software, it is clear that IT buyers will spend many hours trialing software and will be highly likely to make a decision as to which solution they want to buy as the next step.
- Past survey results have validated the rapid growth of interest and usage of online video. This study drills down to specific preferences buyers now have for video, especially related to the value of video quality versus video content.

Online media consumption throughout the IT buying process



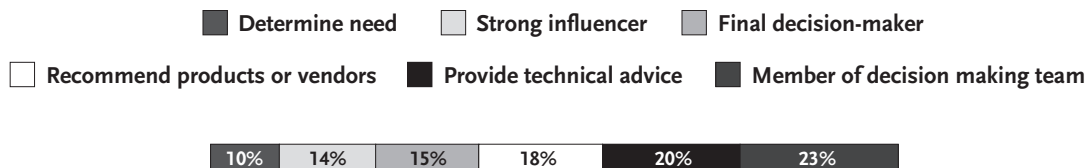
Research Analysis

As verified through past research, the use of the web has become the primary medium for information gathering with nearly all IT pros using it frequently, if not always. Also confirmed here, the research process is not being conducted by a single individual but rather by an entire research team.

How often do you use the internet to research information on technology solutions?



Which of the following best describes your responsibility regarding the purchase of information technology solutions?

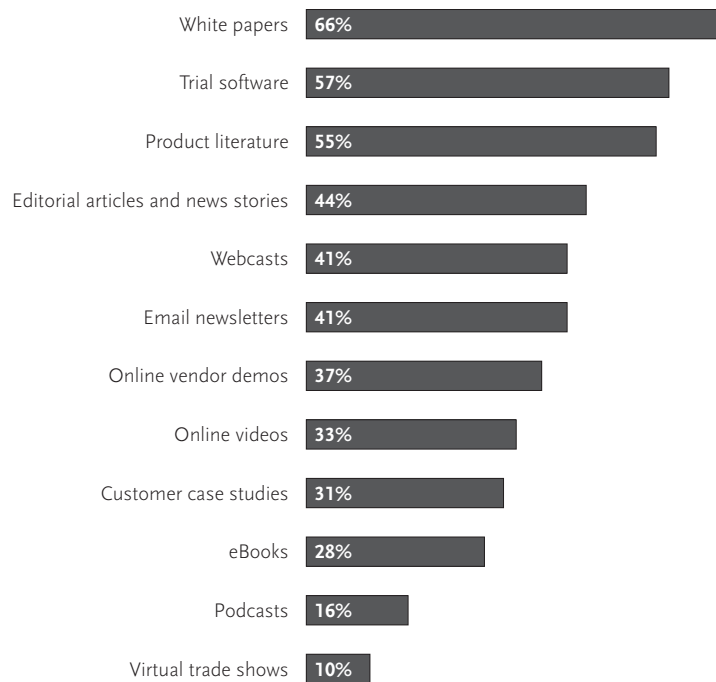


How many people are typically involved in the information technology research and decision-making process?



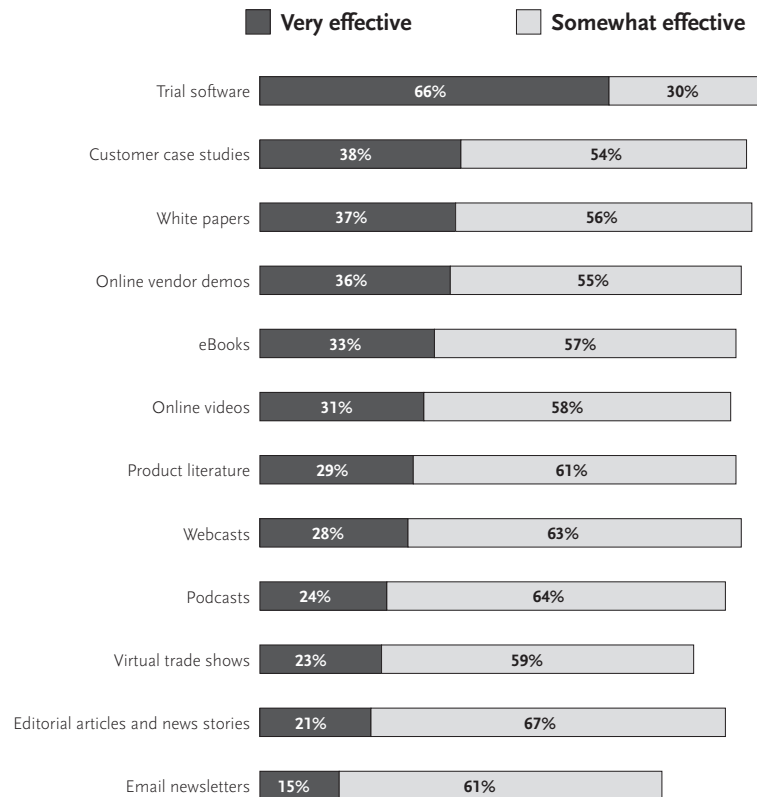
Trial software and white papers are the most utilized, along with being among the most effective, forms of content for researching IT problems and solutions. However, there is a gap between what IT pros find effective and what marketers are making available to them, especially with case studies, vendor demos and ebooks.

Which of the following online content types have you utilized to evaluate new technology information in the past three months?



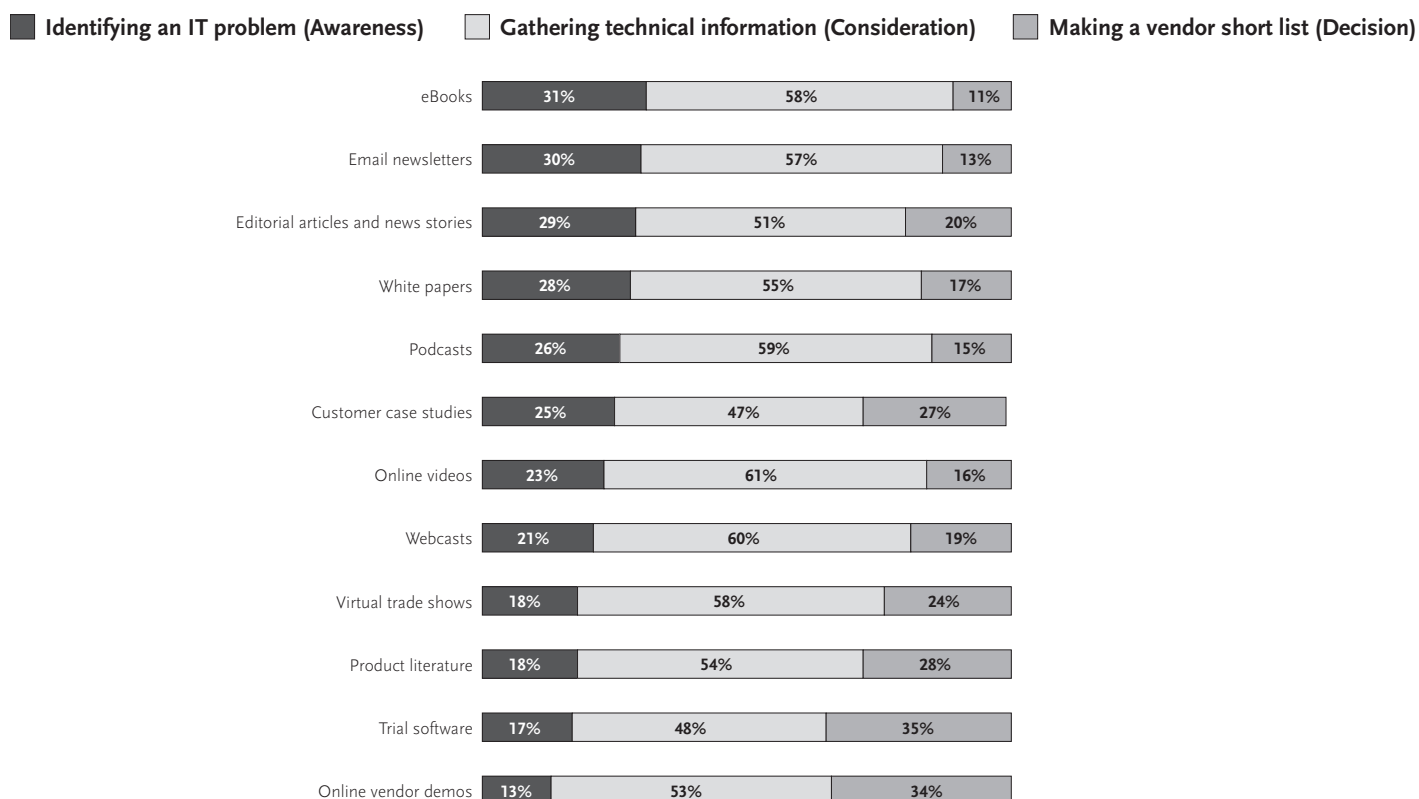
Content effectiveness data
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How effective are the following online content types in delivering information needed to make enterprise technology purchase decisions?



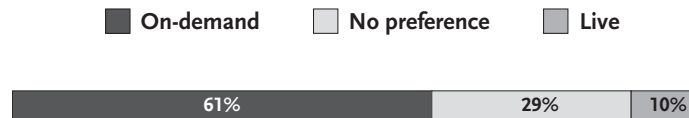
Although all the content types are used throughout the buying process, trial software, vendor demos and vendor product literature are favored towards the later stages of the purchase process. During the beginning stages, however, ebooks, emails and editorial articles are predominately used for problem and technology research, and most likely viewed as third party assets, and consequently unbiased toward specific vendors.

At which stage(s) of your buying process do you use these specific content types?



A majority of online video/webcast viewers prefer the convenience of watching them on-demand. However, for those that prefer the live version, most take full advantage of participating in the live Q&A with the presenters.

Do you have a preference for live or on-demand webcasts/online videos?



Of those who indicated preference for on-demand webcasts/videos, we asked this additional question.

Why do you prefer live webcasts/online videos over on-demand webcasts/online videos?



Online video watchers believe the video quality does affect their perception of the vendor (76%) and somewhat impacts the overall usefulness of the video (78%). However, the video content has more value to IT pros than the video production quality.

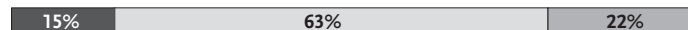
Does the production or viewing quality of an online video impact your perception of the vendor?

- ☒ High quality production creates a positive perception of the vendor
- ☐ Low quality production creates a negative perception of the vendor
- ☐ The quality of production has no effect on the perception of the vendor



Does the production or viewing quality of an online video impact the content's usefulness to you?

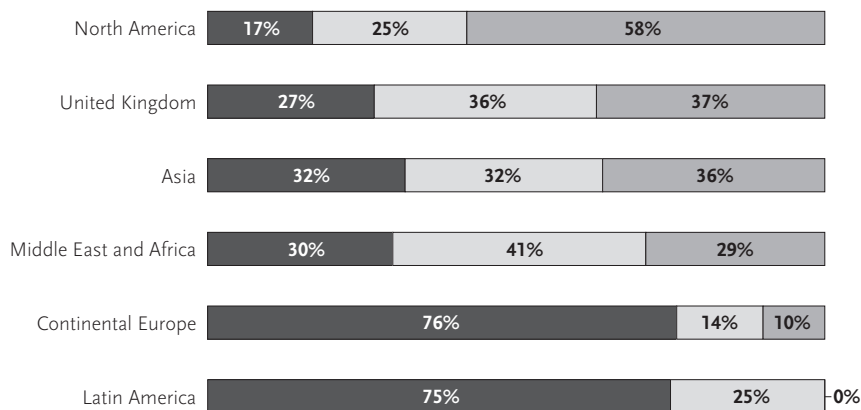
- ☒ Absolutely, I only find online videos useful when they have a high production value
- ☐ Somewhat. I expect a minimum amount of production value to online videos
- ☐ Not at all. As long as the content is relevant then I'll watch anything



Within most countries, online video watchers are willing to read subtitles of a video if they find the content useful. However, in the United States and United Kingdom, viewers expect to have the video produced in English if marketers want to catch their attention.

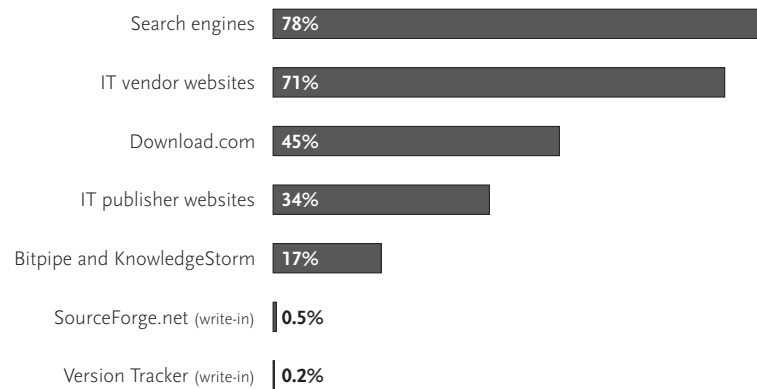
Are you willing to watch an IT-related online video that is not in your native language?

- ☒ Absolutely, If I find the content useful then I have no problem reading subtitles
- ☐ Somewhat. I'll watch a video in a different language but only if I have some spare time and the content is very useful to me
- ☐ Not at all. If a vendor wants me to watch their video then it should be produced in my native language as well

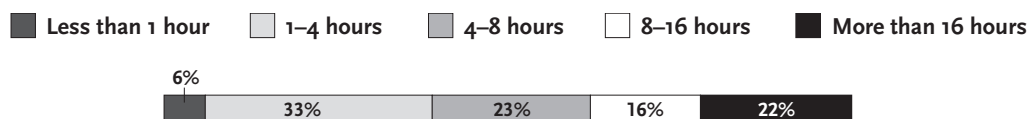


IT pros are looking for trial downloads on either general search engines or going directly to the vendor's website. When evaluating solutions, nearly all will download trial software from more than a single vendor and will spend up to, and even more than, a full day using each of the trials. After downloading a vendor's trial software, the IT pro is more likely to purchase the solution.

Which of the following websites do you visit to search for and download trial software?

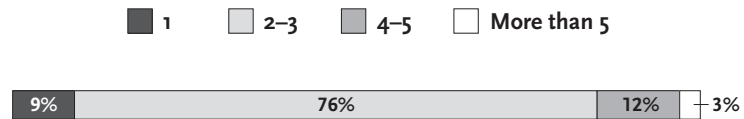


How long do you spend actively using the trial software and evaluating the solution?

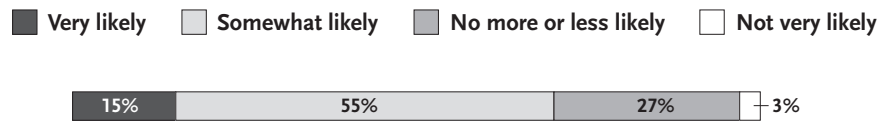


Trial software data
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How many pieces of trial software will you install when evaluating a specific IT solution?

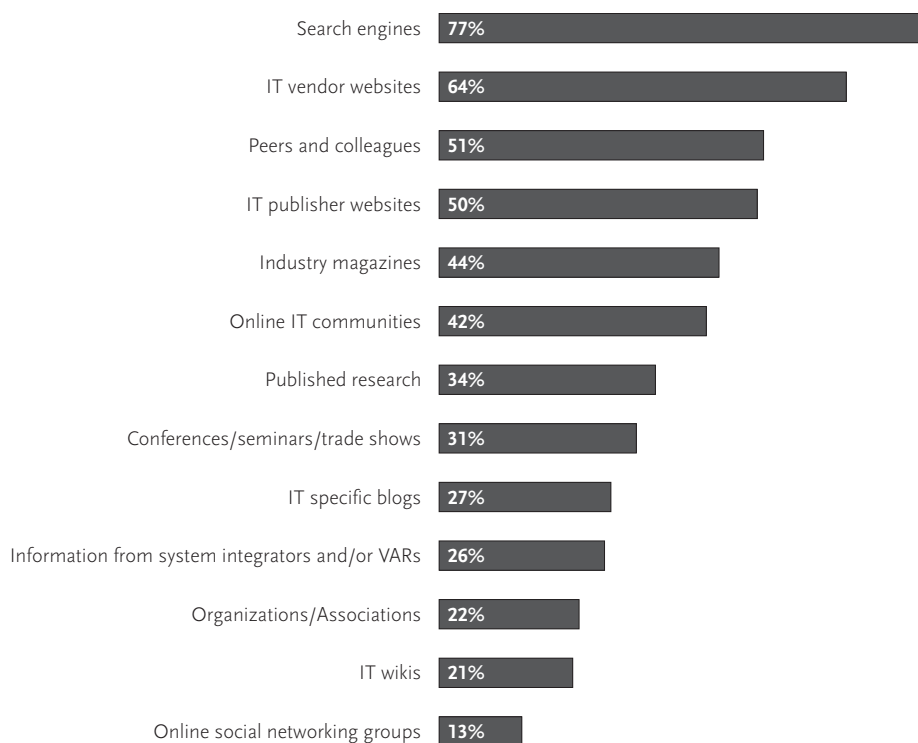


How much more likely are you to purchase the solution after using the trial software?



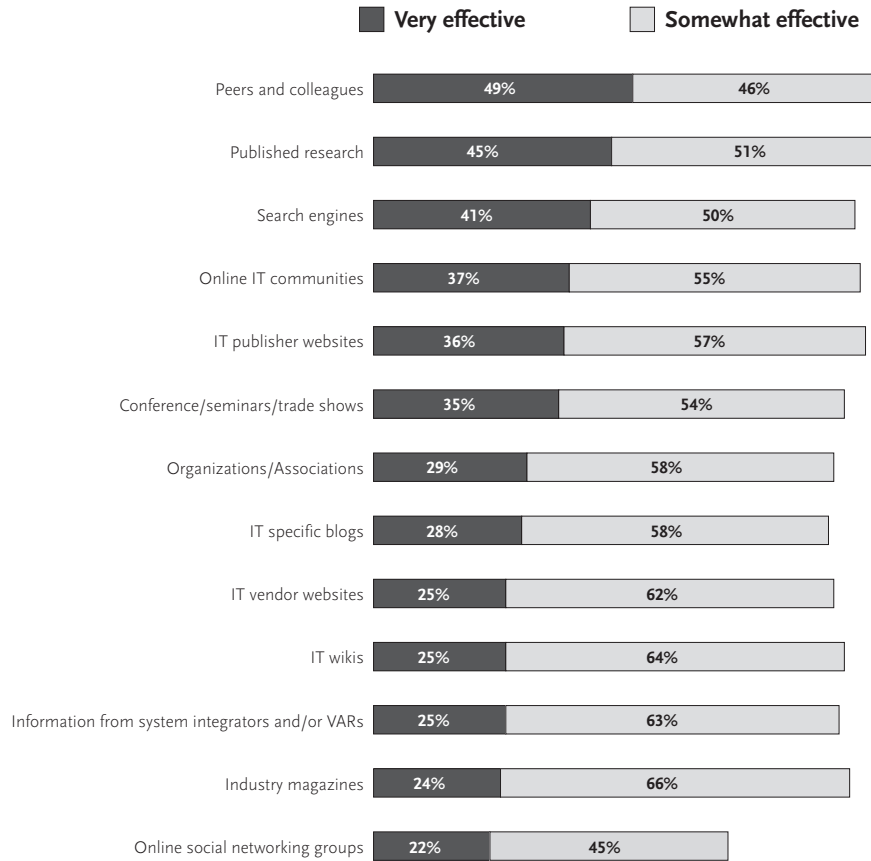
As in the past few years, search engines remain the most used information source during the purchase process. However, more IT pros are turning towards – and trusting – the input of their peers and colleagues along with online communities. There is a large gap between what marketers are offering and what IT pros find useful in the availability of published research. Another interesting point here is that vendor websites are one of the most utilized information sources, although they are not found to be very effective. It seems that IT pros are looking for a more unbiased information source.

Which of the following information sources have you viewed to evaluate new technology information in the past three months?



Information source data
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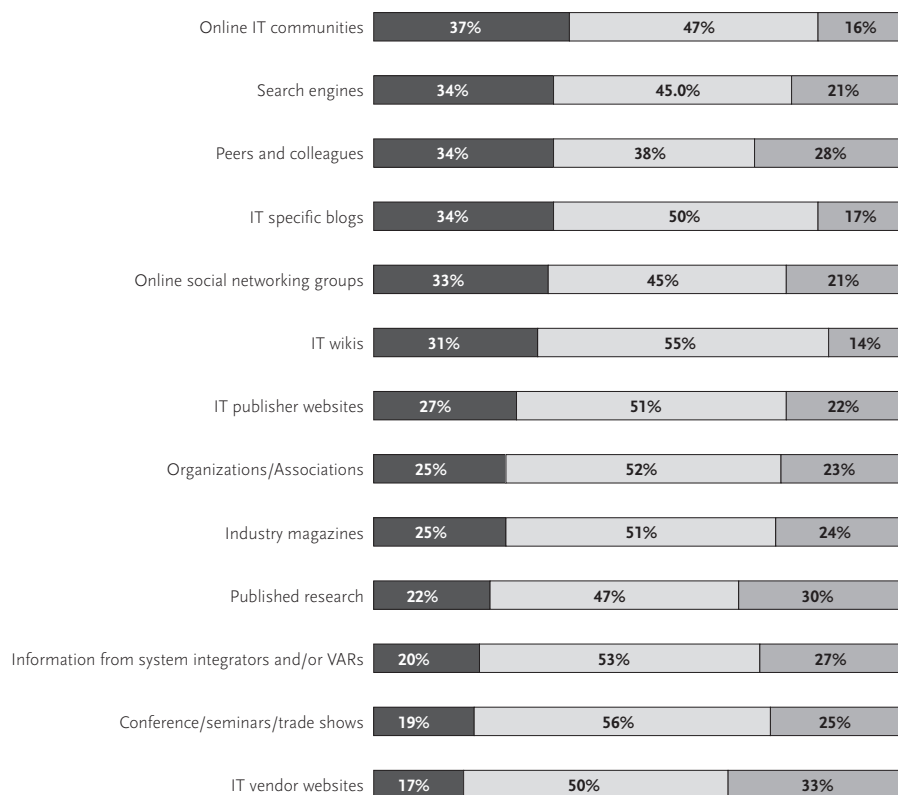
How effective are the following information sources in delivering information needed to make enterprise technology purchase decisions?



All information sources are used throughout the buying process. However, gaining unbiased information from peers and colleagues via online communities, blogs and networking groups is favored during the beginning stages. Whereas the information found on vendor websites is sought after in the later stages, closer to making a final decision.

At which stage(s) of your buying process do you use these specific information sources?

Identifying an IT problem (Awareness)
 Gathering technical information (Consideration)
 Making a vendor short list (Decision)



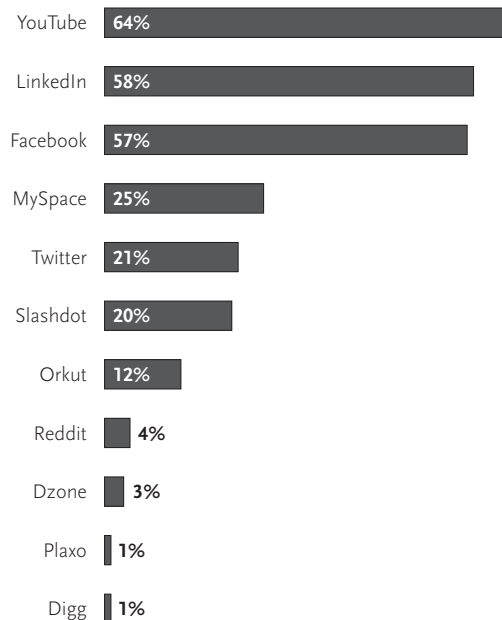
By participating in collaborative websites, IT pros are not only interested in networking with other IT pros, but are also looking for peer-to-peer information without a bias spin. The most popular collaborative websites are YouTube, LinkedIn and Facebook.

What is your primary objective of participating in a collaborative website?

- ☒ Learn more from others about specific companies/products
 ☐ Take part in a knowledgeable community
 ☐ Hear opinions from peers
 ☐ Obtain third-party expert information
 ☒ Post comments or content



Which of the following general online collaborative websites have you visited in the past three months?



With this year's economy, the information gathering process needs to be efficient and there is a need for resources that save time and accelerate the consideration of solution providers – case studies, comparisons, expert analysis – any information that will prove out that the vendor's solution will solve the IT problem at hand.

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

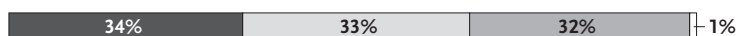
- ☒ Look for content that showcases reliability and proven product success
- ☐ Became more efficient and want information faster
- ☐ Became more receptive to hearing sooner from short listed vendor sales reps
- ☐ None of the above



Of those who indicated they are looking for content that showcases reliability and proven product success, we asked this additional question.

In what format do you prefer to evaluate content that showcases reliability and proven product success?

- ☒ Recommendations from industry analysts
- ☐ Vendor comparisons
- ☐ Case Studies
- ☐ Peers and online forums (write-in)



While the entire purchase process can take up to a full year, the Awareness stage (identifying and researching a problem) generally takes less than 2 months. Whereas the final Decision stage (contacting a short list of vendors) takes less than 4 weeks. This leaves IT pros with most of their time spent in the Consideration stage (researching and shopping the competition).

How long do you spend researching a technology problem?

☒ Less than 2 weeks
 ☐ 2 weeks to 1 month
 ☐ 1 to 2 months
 ☐ 2 to 6 months
 ☒ More than 6 months



How long before you contact a specific vendor for their product information once you've finished your research?

☒ Less than 2 weeks
 ☐ 2 weeks to 1 month
 ☐ 1 to 2 months
 ☐ 2 to 6 months
 ☒ More than 6 months



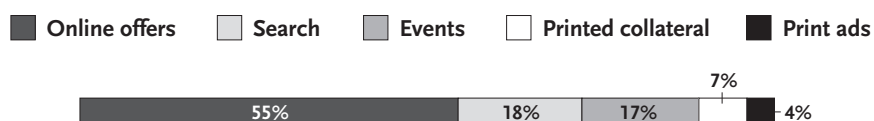
How long is the timeframe from identifying your problem to making your purchase decision?

☒ Less than 2 months
 ☐ 2 to 5 months
 ☐ 6 to 12 months
 ☐ 13 to 24 months
 ☒ More than 24 months

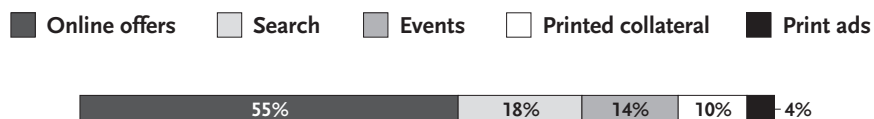


Online is by far the most preferred form of communication for both branding and lead generation.

In which form would you be more receptive to hearing an IT marketers brand value message?



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



IT Buyers Respondent Profile

- 1474 IT professionals from the TechTarget double opt-in IT Research Panel were surveyed.
- All respondents indicated they were involved in the IT decision-making process within their organization.
- The respondents represented a variety of different-sized organizations from within multiple industries.
 - The median company size of the respondents is between 500 and 1,000 employees.
- More than 30% of the respondents hold management titles or higher.
- Most respondents hold either a technical or a combined technical/business role.
 - 46% technical, 8% business, 46% combined role
- The median organization represented had an annual IT budget of about \$5 million.
- Most respondents are located in North America.
 - 58% North America, 9% Asia, 15% Europe, 8% Pacific, 3% Africa, 3% South America, 4% Middle East.

About TechTarget

TechTarget, a leading online Information Technology (IT) media company, provides IT companies with ROI-focused marketing programs to generate leads, shorten sales cycles, and grow revenues. With its network of 56 technology-specific websites and over 7.5 million registered members, TechTarget is a primary Web destination for IT professionals researching which products to purchase. The company is also a leading provider of independent, peer and vendor content, a leading distributor of white papers, and a leading producer of vendor-sponsored Webcasts and Podcasts for the IT market. Its websites are complemented by numerous invitation-only events. TechTarget provides proven lead generation and branding programs to top advertisers including Cisco, Dell, EMC, HP, IBM, Intel, Microsoft, SAP and Symantec.

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