White paper

Customer Engagement Study 2023

Identifying the shifting content and engagement needs of generational IT buyers

FOUNDRY
an IDG, Inc. company

In an industry that seems to change weekly following the bombshell release of ChatGPT in late 2022, one of the few constants has been how IT decision-makers (ITDMs) select products and services. But even some of those tried-and-true techniques may be due for an overhaul.

Foundry's 10th Customer Engagement Study of 843 IT decision-makers (ITDMs) found some notable and even dramatic differences in the attitudes of the youngest IT buyers compared to their more senior peers. Older buyers expressed more skepticism about vendor content than their younger colleagues, who are more open to consuming vendor-supplied resources. The groups differed sharply in some areas about what forms content should take. The youngest cohorts expect vendors to respond far more rapidly to their requests than older age groups. They are also more likely to do business with companies that support causes that matter to them.

Whether these preferences will persist as the influence of these early-career buyers grows is an open question. Still, the starkly different preferences and expectations they express in some areas deserve the attention of technology marketers, who might want to consider making age a standard field in the registration forms they publish.

Over the years, little has changed about how customers evaluate, select and consume the content assets vendors provide. The good news is that customers regard technology vendors as important sources of buying advice. What's not as encouraging is that they continue struggling to find the information they need, and they generally perceive the value of that information to be modest.

The most concerning statistic for technology marketers is that ITDMs said only 44% of the work-related content they downloaded during the past 12 months provided value. That's down from 48% in

2022 although up from 41% in 2021 and 30% in 2019. While 90% said they are willing to register/share their information with a tech vendor to gain access to content, 87% said it is challenging to find the content they need. That's down slightly from 91% in 2022, but the figure has stayed stubbornly high for years despite the resources marketers have poured into search engine optimization and personalization.

87% of IT executives find it challenging to find high-quality information

Boomers	**88%**
Gen X	**89%**
Millennials	**83%**
Gen Z	**85%**

Older respondents are more likely to cite challenges to finding high-quality content and rate the content's value significantly lower than their youngest counterparts. Just 36% of Baby Boomers (born 1946–1964) said downloaded content provides value compared to 54% of Millennials (born 1981–1996) and 60% of Gen Z (born 1997–2002). Although it is tempting to conclude that this indicates greater receptivity among future generations of IT leaders, it could also reflect their relative lack of experience and greater need to educate themselves.

IT professionals are notable outliers on this question. While 44% of IT executives and 43% of business managers said finding high-quality information is extremely or very challenging, that figure was just 23% for IT pros. This may indicate that technology marketers are more adept at providing technical information than strategic business advice.

Asked what frustrates them in their quest for useful content, 39% said too much marketing hype/empty buzzwords (up from 35% in 2022 but down significantly from 50% in 2019), 35% cited lack of unbiased information, 27% said information is too general, and 24% said the information isn't relevant enough.

One encouraging trend is that 22% of respondents hesitate downloading content because they don't want sales follow-up. That figure steadily dropped from 38% in 2017 to 29% in 2022. This could indicate that tech vendors are better at targeting their outreach and applying account-based marketing tactics.

Content marketing isn't a luxury, judging by the 72% of ITDMs who said they are more likely to consider an IT vendor that educates them throughout each stage of the decision-making process, a figure that is consistent with the 74% who said that in

2022. Failure to supply educational material is perceived as a negative by 71% of respondents, which is also consistent with the previous study. Nearly two-thirds said they rely on resources from vendors to help them educate non-technical business users.

Preferred content types have changed little

Over the years, a key feature of Customer Engagement research has been identifying the content types that ITDMs find most useful throughout the buying process. The top five categories have remained unchanged since 2017: product tests/reviews, demos/product literature, technology news, vendor presentations and analyst research. While some content rated lower than others, 13 of the 17 options supplied were cited by at least 20% of respondents, including case studies, interviews with technology experts and peer presentations. This points to the value of a well-rounded marketing plan.

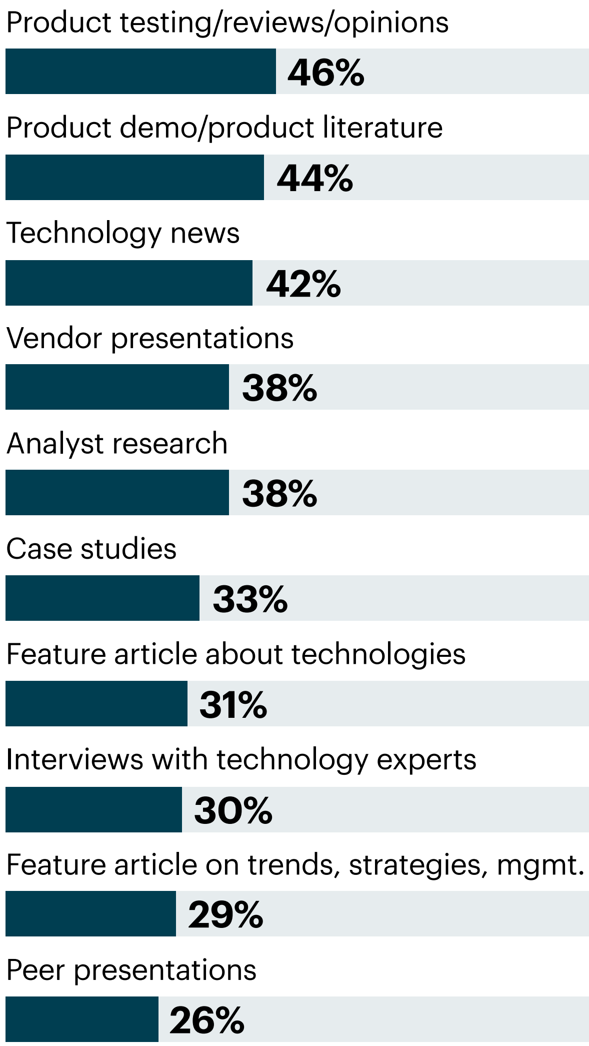
Different titles have different content preferences. For example, four times as many executive IT decision-makers rely upon technology news as business managers (24% to 6%). Conversely, nearly 10 times as many business executives said they value vendor presentations as IT managers (29% to 3%). Similarly, analyst research resonates more loudly with executive IT than people on the business side.

Broken down by age, other contrasts emerge. Just over half of Gen X respondents (born 1965–1980) said product tests and reviews are important compared to 30% of Gen Z. A similar contrast was evident with product demonstrations and literature, which are deemed valuable by 44% of Boomers and 50% of Gen Xers but just 15% of Gen Zers. The youngest cohort relies less on nearly every type of published content than their older peers.

> **71%**
> of ITDMs report that if a vendor does not supply educational content during research, it negatively impacts their impression.

Also remaining unchanged over the years is the type of content used during each of the seven stages of the technology purchasing process. When determining the business need, ITDMs rely upon technology news, trend articles, analyst research, product demos, product reviews, and feature articles

Top 10 content types most relied upon during the IT products and services purchase process



about technology. That isn't surprising during this research-intensive stage.

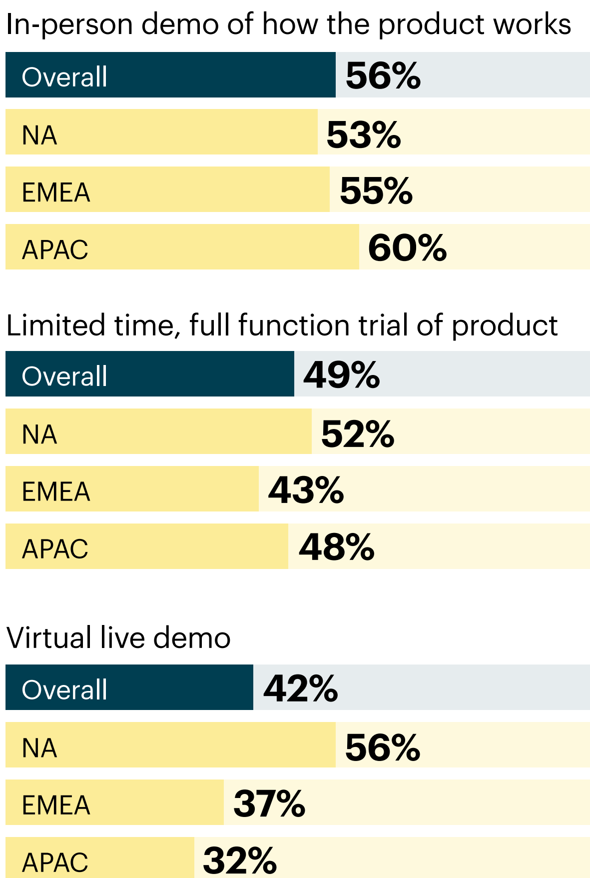
Technology demos and tests assume more value as buyers move to determining technical requirements and evaluating products. At this point, buyers must understand how a product will integrate with other products and services they already use.

When selling a chosen product internally, demos continue to top the value list, followed by analyst research, product reviews, vendor presentations, and case studies. Following the sale, other forms of content enter the picture, such as case studies and how-to information. At this point, buyers are looking for ways to maximize the value of their investments.

One encouraging dynamic of the past few studies is the growing perceived value of vendor presentations throughout the buying cycle. In this year's study, vendor presentations were ranked in the top five most valued content types in six of the seven buying stages, up from three of seven in 2019. Marketers may want to consider making PowerPoint a standard content delivery medium.

Not surprisingly, the topics that interest buyers change with the stages of the buying process. During the early phases, there is a pronounced preference for information about the skills and roles needed to deploy and support the technology, and the pain points the technology addresses. Interest in these topics drops sharply as buyers move into the recommendation and approval stages.

Product demos ITDMs receive the most value from



When evaluating products, customer case studies assume an elevated role. Buyers focus on the financial considerations of purchasing subscriptions versus capital expenses during the vendor selection process. When selling internally and approving the purchase, they seek information about business value and return on investment.

Overall, 90% of ITDMs said they are willing to share information with a tech vendor to gain access to content, a result that was almost identical to last year's 91%. They are most willing to register for product tests/ reviews and analyst research, followed closely by vendor presentations, product demos, case studies, and technology news.

The art of the demo

Because product demonstrations rate so consistently high in the value equation (98% of ITDMs say they value them), we were interested in learning how ITDMs prefer to conduct demo sessions. Globally, the most valuable context is in-person (preferred by 56% and up from 51% last year), followed by limited-time, full-function trials (49%) and virtual live demonstrations (42%).

Regional results varied significantly on this question, however. Virtual demonstrations were the number-one pick among North American respondents, while Europe/ Middle East/Africa (EMEA) and Asia-Pacific (APAC) buyers strongly prefer in-person meetings. Enterprise respondents said they favor in-person demos by a slight 60%-to-52% margin over those at small and mid-sized businesses (SMBs).

Sixty percent of respondents at technology companies ranked limited-time, full-function trials as their top demo format, far ahead of buyers in other industries.

The more technical focus of people at these companies explains the contrast.

IT executives and professionals prefer demos of all kinds more than their business-side colleagues. There were generational differences on the demo question as well; just 39% of Gen Z respondents prefer in-person demonstrations compared to 56% of Boomers, 59% of Gen X and 57% of millennials. This undoubtedly reflects Gen Z's higher overall comfort level with virtual interactions.

The two most recent surveys have also sought to understand better the dynamics of new product introductions from established and emerging vendors. Buyers said the basics are important in both scenarios: Show how the product stands out from the competition, provide detailed product information and offer reassurance that the product easily integrates with existing technology.

Getting to the shortlist

The recommended strategies for established and emerging vendors diverge from there, however. Buyers expect well-established vendors to provide insight into plans, furnish reliable ROI information, demonstrate brand advocacy from customers and employees and offer exclusive previews to customers more than emerging companies. The contrast is sharpest in offering previews to customers, with 51% of buyers expecting such an offer from well-established vendors compared to just 27% from fledgling firms.

Loyalty matters. This year, 78% of ITDMs agreed that known and trusted brands are more likely to make the shortlist, up from 73% last year and in line with the 80% who said that in 2019. Buyers at large enterprises (1,000+ company size) indicated a slightly higher preference for known and trusted brands by an 82%-to-75% margin over SMBs (<1,000 company size).

74%

of ITDMs are more likely to respond to outreach from an IT vendor if they know the technology is already being used by a peer.

To generate positive word-of-mouth, tech marketers should:

1. Provide a great customer experience ITDMs want to tell their peers about
2. Provide timely, relevant content
3. Provide content that offers "how-to" information

Peer perspectives also count. Nearly three-quarters of respondents said they're more likely to respond to outreach from a tech vendor if they know that a colleague or peer is already using the vendor's technology.

96%

of IT buyers have responded to outreach from a potential vendor.

Among Gen Z IT buyers, **89%** have responded

With peers being such an important source of information, marketers should look for ways to help generate positive word-of-mouth. Providing a great customer experience is number one, cited by 48% of buyers. That's followed closely by providing timely, relevant content (43%), furnishing "how-to" information (37%), delivering hard-to-find content (37%), and providing information about a cause that buyers and their peers care about (31%).

On that last point, there was a notable divergence between the 37% of ITDMs at enterprise organizations who said causes matter to them and the 25% of SMBs who agreed. This disparity might be explained by the greater likelihood that larger organizations have company-wide cause-focused initiatives as part of their more extensive environmental, social, and corporate governance programs.

There were also age, industry and regional variances on this question, with Boomers more than twice as focused on content value when deciding to share as Gen Z respondents (48% to 23%). Meanwhile, the youngest cohort is three times as likely as Boomers to put a premium on content that stirs an emotional reaction or has high entertainment value.

By industry, healthcare ITDMs value customer experience significantly more than those in other industries. Regionally, the 55% of North American buyers who cited customer experience as a factor was considerably higher than the 40% in the APAC and 37% in EMEA regions, who ranked timely and relevant content more highly.

Closing the deal

Sharing content also increases the chance that a vendor can obtain a meeting with a prospective customer. Overall, 96% of IT buyers have responded to outreach from a potential vendor, whether with a question, a request for more information or a meeting. The top factors sparking an outreach (tied at 47%) are that the vendor shared valuable content or information

ITDMs expect a prompt follow-up to learn more about a solution

Avg follow-up timeframe	17.5 hrs
Boomers	22 hrs
Gen X	18.7 hrs
Millennials	14 hrs
Gen Z	11.3 hrs

or demonstrated knowledge about the buyer's business or specific challenges.

Tied for third at 42% are vendors describing features or capabilities that stand out from their competitors, demonstrating honesty/transparency, and reaching out at the right time. That last factor is important because the research also showed buyers expect a response to an information request within 24 hours and a follow-up on downloaded content within three days.

There were also differences by title on this question. Executive and management respondents are significantly more likely than IT professionals to respond to a vendor that demonstrates knowledge about their business or challenge (49% vs. 25%) or shows respect for their time (41% to 19%). Just over half of North American buyers value vendors who respect their time, compared to 31% in EMEA and 33% in APAC.

Regardless of how a vendor follows up on a contact, they should do so speedily. Buyers expect to be contacted within 17.5 hours of filling out a form (15 hours in EMEA), a figure roughly consistent with previous surveys. A substantial majority (72%) want to be contacted within 24 hours. Marketing and sales organizations must have a system to speedily filter requests and prepare the sales team to respond with an informed and personalized message when ITDMs raise their hand.

The takeaway is that valued content delivered on an ongoing basis and not just when a sale is imminent furthers relationships and increases the chances that a vendor will get a prospect's attention when the time is right.

Post-pandemic events

COVID-19 changed the way we attend events, at least temporarily. The big question is whether behaviors have changed permanently. This year's study indicates that they haven't. Overall, 82% of ITDMs said they want to attend in-person events in the future. While 77% dropped into at least one virtual event over the past 12 months, that figure is down significantly from 96% in 2022. The top five most-

98%

of ITDMs take at least some kind of action after seeing an ad.

The number 1 action is to conduct additional online research **(51%)**.

attended in-person events are training/workshops (75%), one-day conferences (72%), one-day tradeshows (59%), multi-day conferences (58%), dinner meetings (56%), and roundtable discussions (56%).

The only type of event ITDMs are more likely to attend virtually than physically in the coming year is training/workshops (47% vs. 42% in-person), but the in-person format is preferred for all other event types. That is especially true for dinner meetings (45% in-person vs. 18% virtual), one-day trade shows (44% vs. 23%), and one-day conferences (51% vs. 33%). Buyers are more open to attending multi-day conferences virtually but prefer physical attendance at short-duration events.

Ads work

We were also interested in better understanding how buyers interact with ads. Do they spur action? The answer is a resounding yes. In fact, 98% of ITDMs said that they had taken some action based on an ad, with the top response being to conduct additional online research (51%). There were some title differences on this question, with IT executives and pros more likely to opt for online research while IT and business managers more often visit vendor websites to learn more.

On an age basis, Gen X respondents are more likely to reach out directly for more information than their counterparts in other generational groups. It's worth noting that 30% of millennials and 22% of Gen Zers interact with ads on social media platforms compared to only 9% of Boomers and 11% of Gen Xers. Also notable is that 26% of Gen Zers said they had purchased directly from an ad, compared to 4% of Boomers and 6% of Gen Xers.

North American decision-makers are significantly more likely to conduct online research (61% vs. 45% in APAC), visit a vendor's website (59% vs. 42% in EMEA), request additional information (46% vs. 29% in EMEA), and download a demo or trial version (41% vs. 28% in EMEA and APAC) than respondents in other regions.

Regardless of region, just over half of ITDMs engage with tech advertising if it addresses current challenges or business objectives. That's particularly true at large enterprises, which cited relevance as a factor by a 57%-to-46% margin over SMBs. North American and EMEA buyer are somewhat more inclined than their APAC peers to follow up if the topic is something they have recently searched for. Other critical follow-up criteria: The advertised product is comparable to one the company already uses, the ad promises information content, or the advertiser is a competitor to a current vendor. These are all important criteria marketers can use to craft their messages.

91%

of ITDMs prefer ads that are tailored towards them.

50% say they prefer ads tailored by their industry.

The topic of ad personalization turned up an interesting insight. Over 90% of ITDMs said they are interested in ads tailored to them, mainly if the subject is relevant to their industry. Half of all respondents (65% of business managers) prefer industry-specific content. Topics about technology platforms installed in their organization came in well behind at 39%, followed by personalization based on the content they previously searched, job responsibilities, and company size.

Technology marketers should take heed of this finding since the content they produce is typically centered on products and platforms rather than industries. The survey suggests that that mix could use some fine-tuning. There were also regional differences worth noting: 18% of North American buyers prefer personalization based on company size compared to 30% in EMEA and 32% in APAC. That finding could reflect different regulatory environments in those geographies.

Generational differences were evident here as well. Nearly 70% of Gen Z buyers and 54% of Millennials said they expect a response to their outreach within 12 hours, compared to just 21% of Boomers and 31% of Gen Xers. This indicates that the constantly connected lifestyle these young people have always known influences expectations. Text messages, which are used by people under 25 far more than other age groups, typically generate a response within 90 seconds compared to six hours for email. Marketers may consider adding a date field to registration pages to guide the form and timeliness of their responses.

Seeds of change

Some of the takeaways from this 10th study are the same as previous surveys: Buyers value information that helps them make the best buying decisions for their companies regardless of the source. Technology vendors can be as valuable a resource as publishers and even peers. Content needs change throughout the buying cycle; trust is a vendor's most valuable asset.

Some results merit further examination and reflection. The expectations, practices, and preferences of the youngest ITDMs differ from those of their elders in some dramatic ways. Marketers should consider these factors in designing their content and communication programs. The survey also showed a marked buyer preference for content specific to industries. While a single data point shouldn't trigger an overhaul of an entire marketing program, the finding merits further examination and possibly adjustment of some marketing priorities.

One of the most common terms that comes up when people discuss generative AI is "revolutionary." There is no question that marketing will be forever changed by the ability to generate personalized messaging at scale and to benefit from expert insights on customer behaviors and interactions. We don't know how AI will impact how IT decision-makers gather and ingest information, but human behavior changes far more slowly than technology. These trends will be closely watched in future Customer Engagement research.

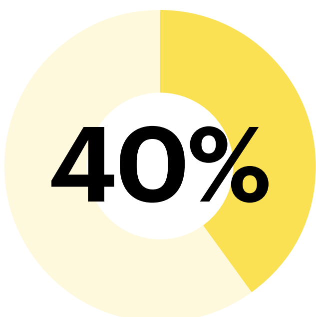
About the survey

Foundry's 10th annual Customer Engagement Study was conducted among the audience of 843 IT and business decision-makers. Foundry conducted this survey online throughout November 2023 to better understand the various types and volume of content consumed throughout the purchase process for major technology products and services. It also looks to gain insight into the preferences of IT decision-makers regarding IT vendor contact and follow-up during the purchase process. All respondents had IT or management titles, with 41% based in North America, 42% in Asia/Pacific (APAC) regions, and 14% from Europe/Middle East/Africa (EMEA).

Key global differences

For many survey questions, security leaders report similar results across all three regions surveyed. However, a few key points of difference stick out.

North America



of work-related content downloaded by North America ITDMs in the past 6–12 months has provided them with actionable information

89% say it is challenging to find enough high-quality, trusted information on major IT products and services to make informed purchase decisions.

- Mostly due to too much marketing hype/empty buzzwords, lack of truly independent, unbiased information, information is too general, and hesitant to download because they don't want the sales follow-up.

Content types North America ITDMs rely on the most throughout the purchase process

- Product demo/product literature
- Product testing/reviews/opinions
- Analyst research
- Vendor presentations
- Technology news

87% are willing to register/share their information with a tech vendor in order to gain access to valuable content.

Top three information topics of most interest throughout the purchase process

- Skills/roles information needed to deploy and support the technology
- Business value of the technology
- Pain points the technology addresses

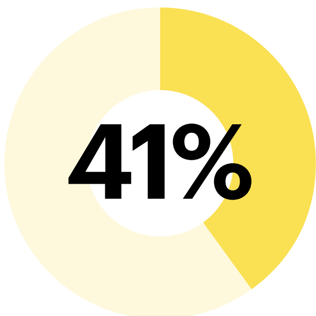
92% of North America ITDMs have taken additional actions after seeing an advertisement for technology solutions.

They prefer their ads to be tailored based on:

- Their industry **(54%)**
- The technology platform(s) already installed at their organization **(42%)**
- Content they previously searched for **(29%)**
- Their responsibilities **(29%)**

94% of North America ITDMs attended a job-related event in the past 6–12 months, with the top format being a training/workshop, followed by a one-day conference.

EMEA



of work-related content downloaded by EMEA ITDMs in the past 6–12 months has provided them with actionable information

88% say it is challenging to find enough high-quality, trusted information on major IT products and services to make informed purchase decisions.

- Mostly due to too much marketing hype/empty buzzwords, lack of truly independent, unbiased information, and content overload.

Content types EMEA ITDMs rely on the most throughout the purchase process

- Product testing/reviews/opinions
- Vendor presentations
- Product demo/product literature
- Technology news
- Analyst research

90% are willing to register/share their information with a tech vendor in order to gain access to valuable content.

Top three information topics of most interest throughout the purchase process

- Pain points the technology addresses
- Business value of the technology
- Skills/roles information needed to deploy and support the technology

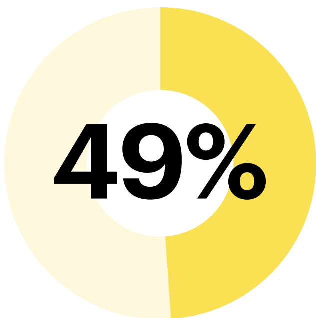
91% of EMEA ITDMs have taken additional actions after seeing an advertisement for technology solutions.

They prefer their ads to be tailored based on:

- Their industry **(49%)**
- The technology platform(s) already installed at their organization **(35%)**
- Content they previously searched for **(30%)**
- Company size **(30%)**

92% of EMEA ITDMs attended a job-related event in the past 6–12 months, with the top format being a training/workshop, followed by a one-day tradeshow.

APAC



of work-related content downloaded by APAC ITDMs in the past 6–12 months has provided them with actionable information

86% say it is challenging to find enough high-quality, trusted information on major IT products and services to make informed purchase decisions.

- Mostly due to too much marketing hype/empty buzzwords, lack of truly independent, unbiased information, and information is too general.

Content types APAC ITDMs rely on the most throughout the purchase process

- Technology news
- Product testing/reviews/opinions
- Product demo/product literature
- Vendor presentations
- Case studies

93% are willing to register/share their information with a tech vendor in order to gain access to valuable content.

Top three information topics of most interest throughout the purchase process

- Skills/roles information needed to deploy and support the technology
- Customer case studies
- Implementing new tech vs. outsourcing

96% of APAC ITDMs have taken additional actions after seeing an advertisement for technology solutions.

They prefer their ads to be tailored based on:

- Their industry **(47%)**
- The technology platform(s) already installed at their organization **(38%)**
- Company size **(32%)**

93% of APAC ITDMs attended a job-related event in the past 6–12 months, with the top format being a one-day conference, followed by a training/workshop.

Examining the marketplace

Research is an invaluable way for marketers to better understand customers and prospects, with the goal of building quality connections. At Foundry this is one way we are focused on building bridges between tech buyers and sellers. Our first-party relationships with the most important tech buyers and influencers around the world, allows us to apply value across our customers marketing stack. Our research portfolio explores our audiences' perspectives and challenges around specific technologies—from analytics and cloud, to IoT and security—and examines the changing roles within the IT purchase process, arming tech marketers with the information they need to identify opportunities.

To see what research is available, visit foundryco.com/tools-for-marketers. For a presentation of full results from any of these studies, contact your Foundry sales executive or go to foundryco.com/contact-us.

Buying process

Each year we take a deep dive into the enterprise IT purchase process to learn more about who is involved and who influences decision-making, what sources purchasers rely on to keep up to date with technology—and throughout the purchase process—and how they want to engage with the vendors they are working with. Visit foundryco.com/customerjourney for more information.

Buying process studies

- Role and Influence of the Technology Decision-Maker
- Customer Engagement

Technology insights

Each year we explore the technologies that are top of mind among our audiences to understand the business challenges, drivers, and adoption within the enterprise. These research studies are designed to help IT marketers understand what their customers are focused on and where the market is moving.

Role and priority studies

- CIO Tech Poll: Tech Priorities
- State of the CIO

Technology-specific studies

- Data and Analytics
- Cloud Computing
- Digital Business
- Security Priorities
- AI Priorities

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Foundry's vision is to make the world a better place by enabling the right use of technology, because we believe that the right use of technology can be a powerful force for good.

Foundry (an IDG, Inc. company) is a trusted and dependable editorial voice, creating quality content to generate knowledge, engagement and deep relationships with our community of the most influential technology and security decision-makers. Our premium media brands, including CIO®, Computerworld®, CSO®, InfoWorld®, Macworld®, Network World®, PCWorld® and Tech Hive®, engage a quality audience of the most powerful technology buyers with essential guidance on the evolving technology landscape.

Our trusted brands inform our global data intelligence platform to identify and activate purchasing intent, powering our clients' success. Our marketing services create custom content with marketing impact across video, mobile, social and digital. We simplify complex campaigns that fulfill marketers' global ambitions seamlessly, with consistency that delivers quality results and wins awards. Additional information about Foundry is available at foundryco.com.