

Global IT content survey

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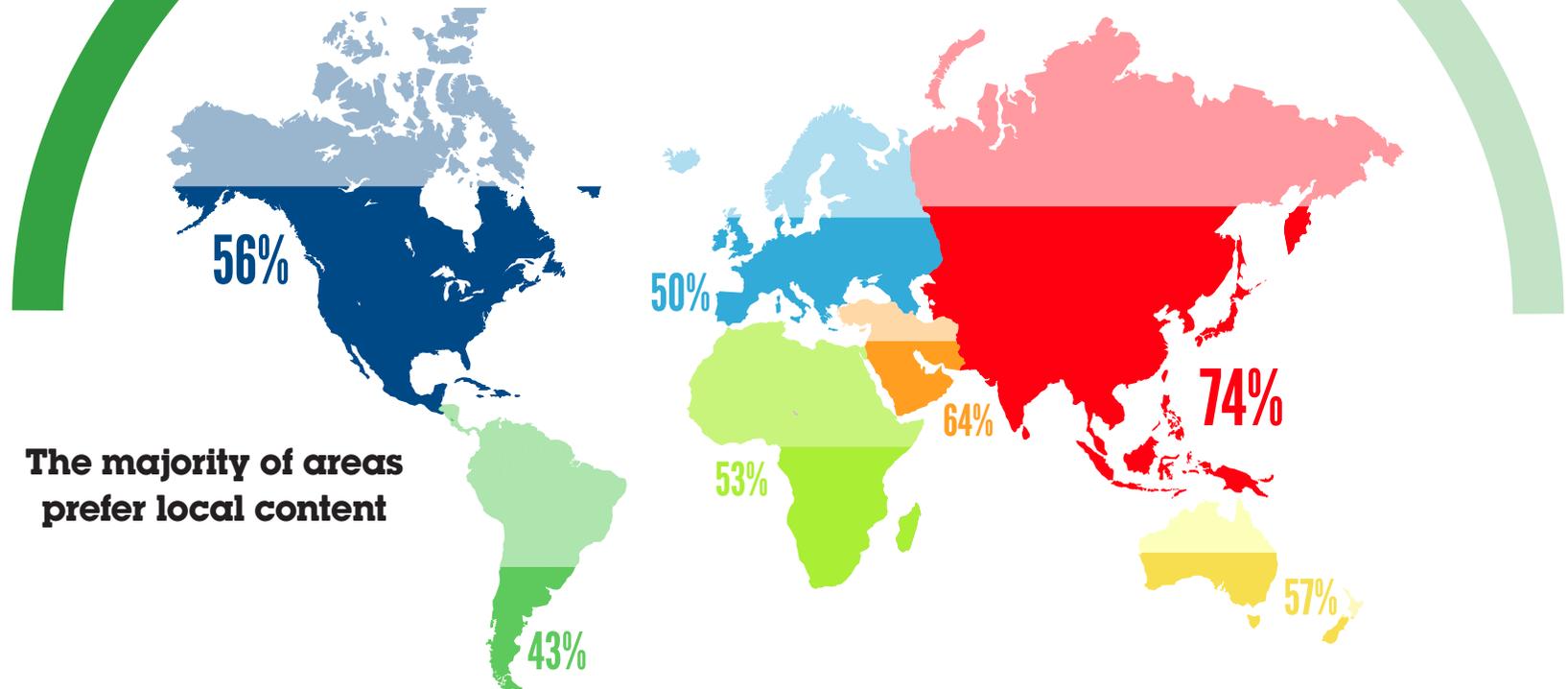
Global IT Content Survey 2011



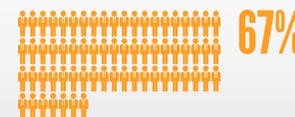
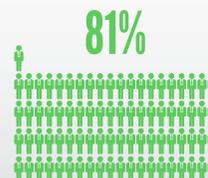
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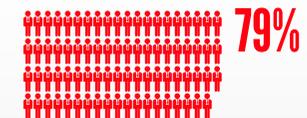
72% of global IT professionals find white papers extremely useful



The majority of areas prefer local content



High percentages still struggle to find local content



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Introduction:

The global IT content survey 2011

The technology industry is going global. Five years ago, 52% of the revenue generated by North America's largest technology companies came from beyond the Americas. Today, the proportion is 58% and rising.

Future growth will increasingly rely upon far-flung sources of dynamism. The EU is already the world's largest economy. Collectively, the BRIC nations -- Brazil, Russia, India and China -- will generate sufficient GDP to overtake the US in 2012. (1) By 2020, China alone will have outstripped the EU as a whole in terms of output. (2) Increasingly, technology marketers must become attuned to the needs of a diverse global audience.

This survey of 3,217 IT professionals in 114 territories suggests that vendor content is a remarkably powerful marketing tool.

Worldwide, 72% of IT professionals say they find content of this kind "extremely useful" or "useful". In Africa, Asia and South America, the numbers rise sharply, to encompass nearly all IT professionals.

Yet the technology industry is also failing to exploit the full potential of this much-loved medium. Outside of North America, the proportion of IT professionals who say they are "always interested in consuming IT white papers" is relatively low, in advanced and emerging economies alike.

IT professionals outside North America say they want localised studies. What they often get are white papers that are heavily influenced by North American perspectives. In Asia, 74% of IT professionals say they would prefer localised content, but 79% say they "struggle" to find it. In Europe, half of IT professionals prefer to read localised content. Yet 55% "struggle" to find it.

Are these demands for localised content a recipe for soaring costs? Not necessarily. Our research suggests that small adjustments could prove effective.

Instead of generating entire new streams of localised content, our research demonstrates that vendors should attempt to blend local perspectives with "global" (or North American-flavoured) content. The high levels of frustration experienced by rest-of-the-world IT professionals indicate that modest amounts of localisation will enhance engagement.

In order to realise the *global* potential of their messaging, marketers must become increasingly local in their approach. This white paper aims to help achieve that goal.

[Footnotes: (1) IMF, World Economic Outlook, April 2011; (2) PwC/World Bank, January 2011]

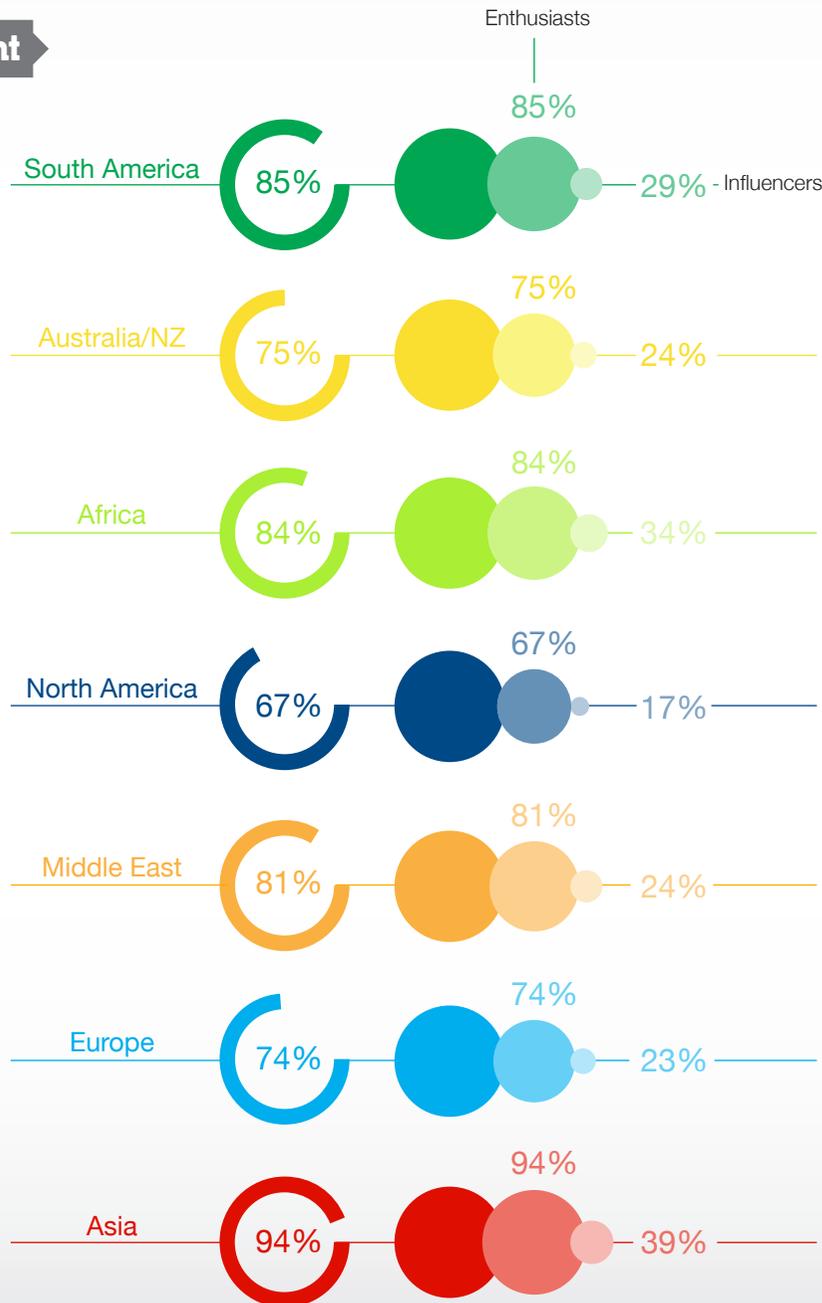


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Fig 1: Enthusiasts: % of IT professionals who call white papers "extremely useful" or "useful"

Fig 2: "% of influencers and enthusiasts in IT professionals"



Enthusiasts & influencers:

IT professionals appreciate vendor content

IT professionals really do appreciate vendor content. In every region we surveyed, a large majority of IT professionals find vendor content "extremely useful" or "useful". In this report, we're going to call this audience "enthusiasts".

The lowest proportion of enthusiasts exists in North America, where 67% say white papers are "extremely useful" or "useful". Approval ratings are higher in other parts of the world, including Europe (74%) and Australia/New Zealand (75%).

In the developing world, enthusiasts predominate. In Africa, the Middle East and South America, well over 80% of IT professionals say white papers are "extremely useful" or "useful". The highest approval ratings occur in Asia (94%).

These numbers tell us something about the context into which vendors publish white papers. In a saturated US market, large amounts of analysis are readily available. In the developing world, the output of analyst firms is scarcer and relatively expensive. This may help to explain why IT professionals in emerging economies place a higher value on access to

vendor-produced content. Yet perhaps we should be wary of these high approval ratings among self-proclaimed "enthusiasts", the majority of whom merely say that they find white papers "useful".

By narrowing down the focus to only those IT professionals who find white papers "extremely useful", we sought to isolate an inner core of enthusiasts in each region. We've described these respondents as influencers, because they almost certainly amplify the impact of vendor content via email, social media and blogs.

In which regions are influencers most numerous relative to the broad population of IT professionals? The numbers reveal a straight split between developed economies (where the number of influencers is relatively low) and emerging economies (where the number of influencers is much higher).

Conclusion: The most receptive audiences for vendor content live and work beyond the heartland of the enterprise IT industry, in the world's high-growth emerging economies and the industrialised economies of Europe and Australasia.

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Fig 3: Enthusiasts in North America:
Top content preferences

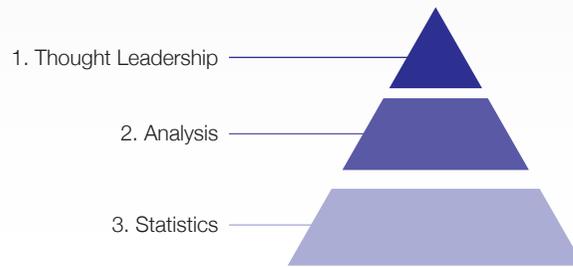


Fig 4: Enthusiasts in the rest of the world:
Top content preferences

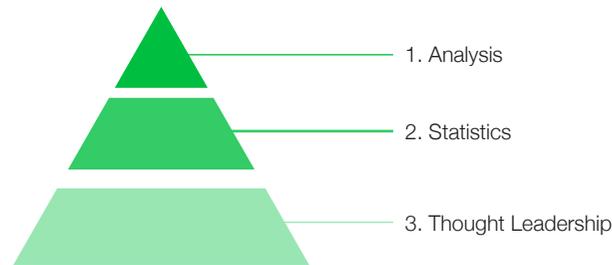


Fig 5: Enthusiasts:
Top content preferences worldwide

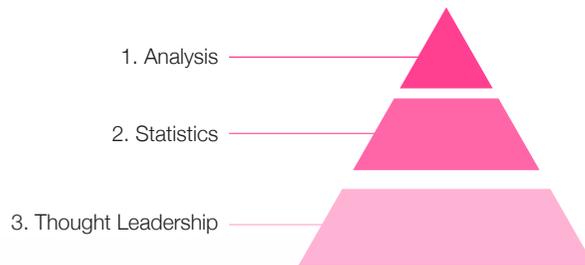
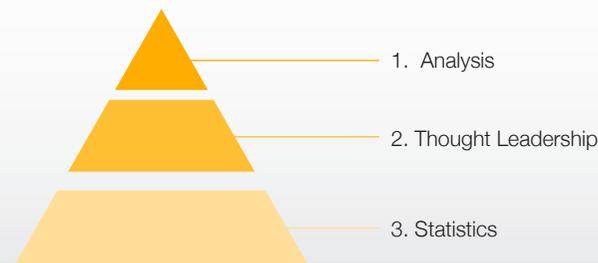


Fig 6: Influencers:
Top content preferences worldwide



Left-brain, right-brain:

IT professionals in North America are different

Asked what they find “extremely useful” or “useful”, “enthusiast” IT professionals in North America express a slight preference for thought leadership over analytical content. Statistical surveys lag behind in third place.

Besieged by statistical and analytical content, these findings suggest that IT professionals in North America crave original thinking about common dilemmas, delivered in the form of thought leadership.

What US IT professionals want most of all, the rest of the world wants least. IT professionals in Asia and the Middle East, for example, most frequently describe statistical studies as “extremely useful” or “useful”. In Africa, Australia/New Zealand, Europe and South America, white paper enthusiasts find analysis most useful.

Conclusion: IT professionals in North America differ from the rest of the world in their content preferences. While North American IT professionals crave classic right-brain content (intuitive and contextual thought leadership), IT professionals in the rest of the world appreciate left-brain content (analysis and statistics). Vendors should consider adapting white paper

content to meet the rather different preferences of IT buyers outside North America.

Does the inner core of influencers in each region feel the same way as the broad population of enthusiasts? Not quite.

In three of seven regions (Africa, Australia/New Zealand and North America), thought leadership emerges as the no.1 preference among influencers. In Asia, Europe, the Middle East and South America, influencers prefer analysis. On a global basis, it's noticeable that highly-engaged influencers, who may also be generally better informed about IT markets, rate thought leadership higher than statistical research.

Conclusion: Marketers operating on a global basis who wish to build a bridgehead with highly-engaged influencers should focus on producing analysis, supported by thought leadership. By contrast, if the aim is to move the needle within a broad global market of enthusiasts, analysis should be blended with a statistical approach. With its unrivalled global reach, IDG Connect can advise you on the most appropriate tactics for specific regions and territories.

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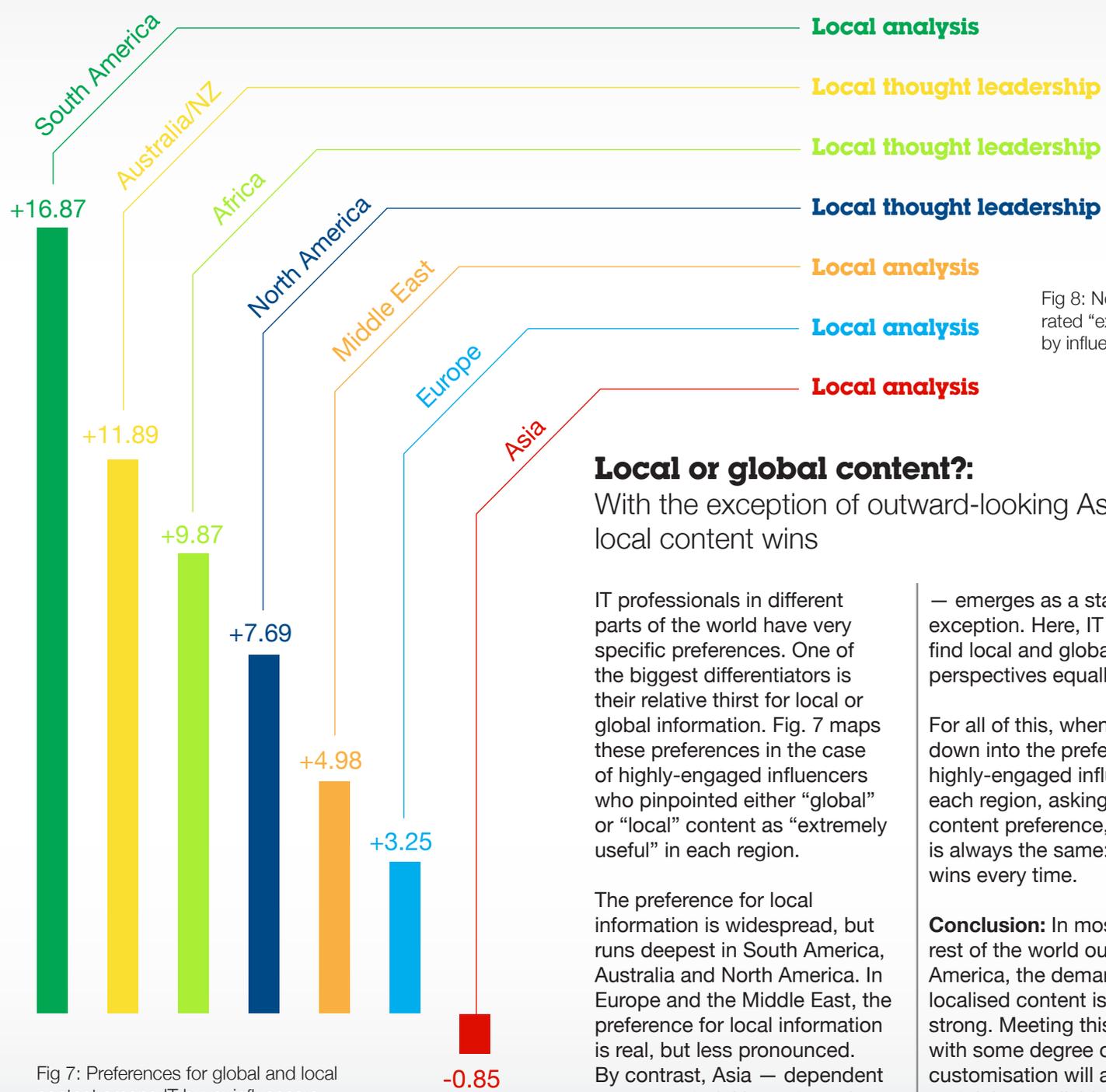


Fig 7: Preferences for global and local content among IT buyer influencers
* [Vertical scale: Plus = local; Minus = global]

Fig 8: No.1 content type rated "extremely useful" by influencers, by region:

Local or global content?:

With the exception of outward-looking Asia, local content wins

IT professionals in different parts of the world have very specific preferences. One of the biggest differentiators is their relative thirst for local or global information. Fig. 7 maps these preferences in the case of highly-engaged influencers who pinpointed either "global" or "local" content as "extremely useful" in each region.

The preference for local information is widespread, but runs deepest in South America, Australia and North America. In Europe and the Middle East, the preference for local information is real, but less pronounced. By contrast, Asia — dependent on raw material imports and the export of finished goods

— emerges as a stand-out exception. Here, IT professionals find local and global perspectives equally useful.

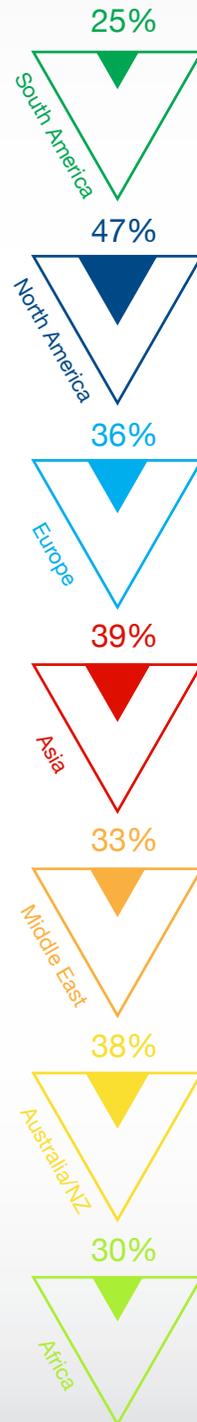
For all of this, when we drill down into the preferences of highly-engaged influencers in each region, asking for their no.1 content preference, the answer is always the same: local content wins every time.

Conclusion: In most of the rest of the world outside North America, the demand for localised content is extremely strong. Meeting this demand with some degree of local customisation will almost certainly pay dividends in terms of engagement.

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Fig 10: Mavens - A Regional View



The not-so-good news:

Outside the US, white papers attract fewer “always on” readers

IT professionals around the world demonstrate a strong appetite for white papers. But how high are levels of engagement?

We asked IT professionals whether they are “always interested in consuming IT white papers”, or whether they seek them out “when it is relevant to a specific project”. In this research report, we describe these separate groups as “mavens” and “searchers”.

Maven-like behaviour is good news for marketers because it maximises reach. However, on a regional basis, engagement levels are variable. Despite much enthusiasm for white papers in principle, the proportion of “always-on” mavens dwindles to around one-third of respondents in Europe and the Middle East, and to one-quarter in South America.

Localised content drives up reader engagement

Why are levels of reader engagement lower in some regions than others?

We wanted to test the theory that engagement is driven by the local relevance of white papers. To do so, we asked respondents two questions:

- Do you generally prefer to read IT content that is localised to your region?

- Do you struggle to find regional reports that concentrate on the IT challenges in your particular country?

The numbers reveal a correlation between high levels of (often frustrated) demand for localised content and sub-optimal audience engagement.

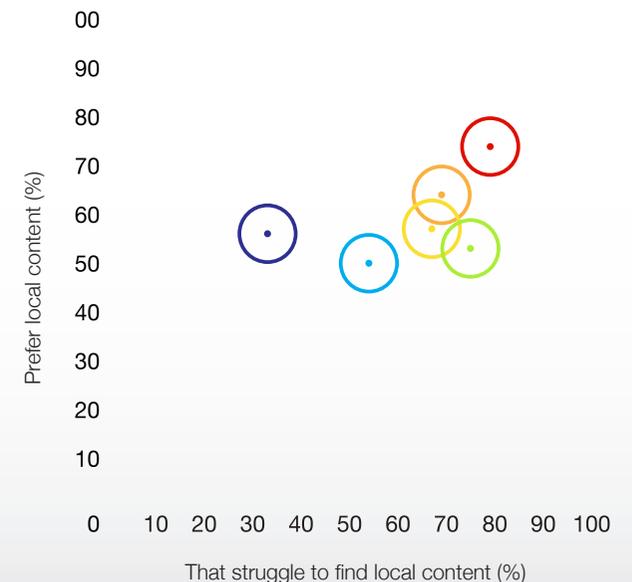
The main exception is North America, where demand for localised content is fairly high, but appears to

be largely satisfied. (Only 33% of North American respondents say they “struggle” to “find regional reports that concentrate on the challenges in my particular country”). Perhaps as a result, in North America, more IT professionals qualify as committed readers (mavens) than anywhere else in the world.

The figures for Europe support the argument. Here, demand for local content is slightly lower than in the US, but 54% of respondents say they struggle to find it (compared with 33% in North America). As a result, engagement in Europe is lower than in the US, but higher than in emerging economic regions.

Conclusion: The best way to boost reader engagement is to give readers what they want. What IT professionals around the world want more than anything else is localised content.

Fig 11: High levels of localised content results in higher reader engagement



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Fig 16: Local frustration: Supply and demand of localised content in North America & the BRIC nations

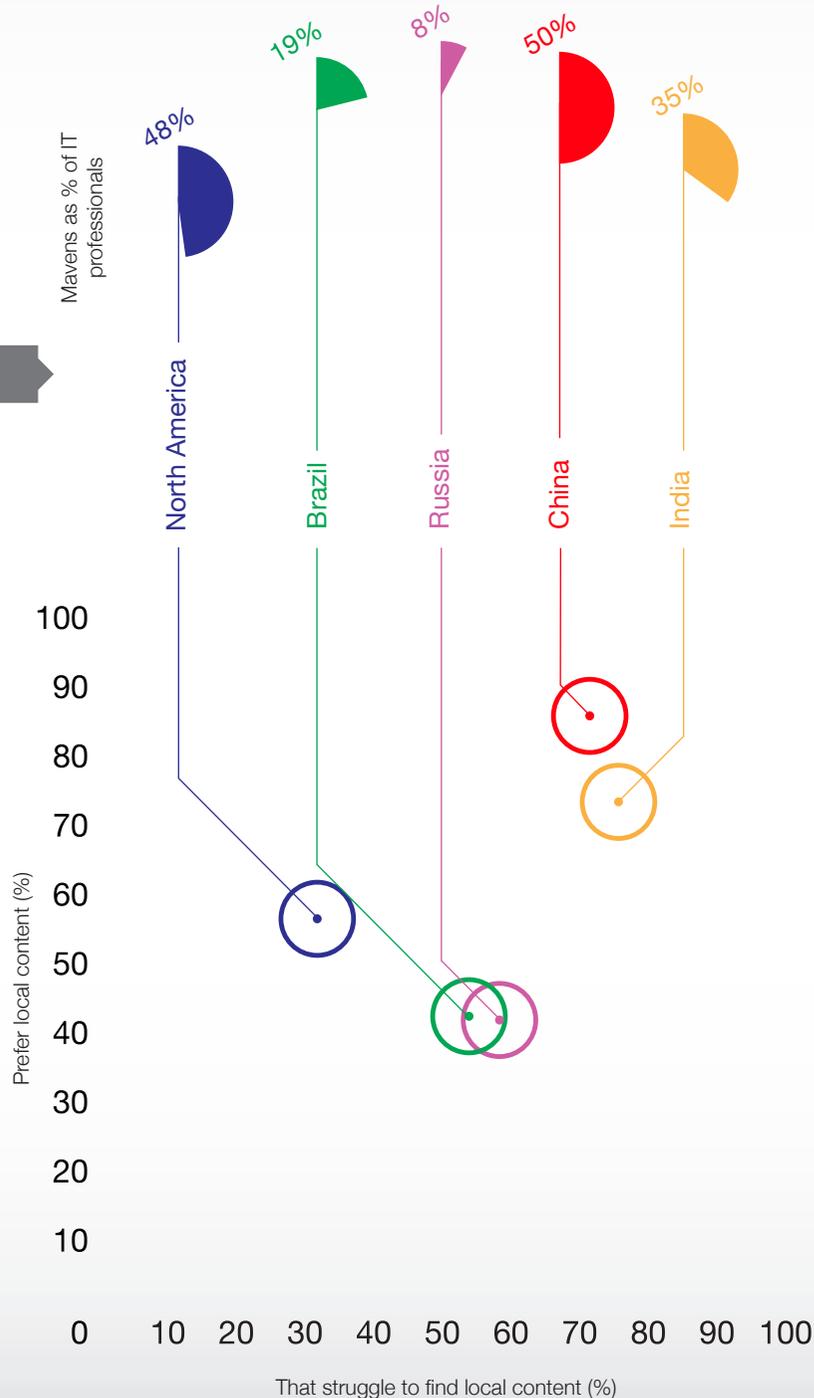


Fig.12: America's 10 largest IT companies, by revenue (2005)
(Source: Company reports, Fortune 500 2006)



Fig. 13: America's 10 largest IT companies, by revenue (2010)
(Source: Company reports, Fortune 500 2011)

Case study: the BRICs

Demand for local content in the world's fastest growing economies

Today, 58% of the revenue dollars generated by America's largest publicly-quoted technology companies come from markets beyond North America, up from 52% in 2005.

The world's largest emerging economies represent the best chance of maintaining, or improving, the industry's growth rates. Perhaps the most promising sources of growth are to be found in Brazil, Russia, India and China, collectively known as the BRICs.

Our research suggests that IT professionals in the BRICs possess a striking appetite for vendor content of *all* kinds. These audiences are eager for information about how their domestic *and* global competitors are using technology. To use an expression more commonly

applied to western companies operating in emerging markets, their approach appears to be truly global.

However, the evidence strongly suggests that in the BRICs, as in other emerging markets, IT vendors could be doing more to meet the demands of these potential customers. In the BRICs, for example, demand for localised content is extremely high. Yet by comparison with North America, very large majorities of IT professionals say that they struggle to find such content.

Conclusion: IT professionals in the BRIC nations are ready and willing to listen to IT vendors from the developed world. Vendors could, and should, be doing more to engage them in conversation.

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Fig 17: Respondents who say they would generally prefer to read IT content localised to their region (outer Ring):

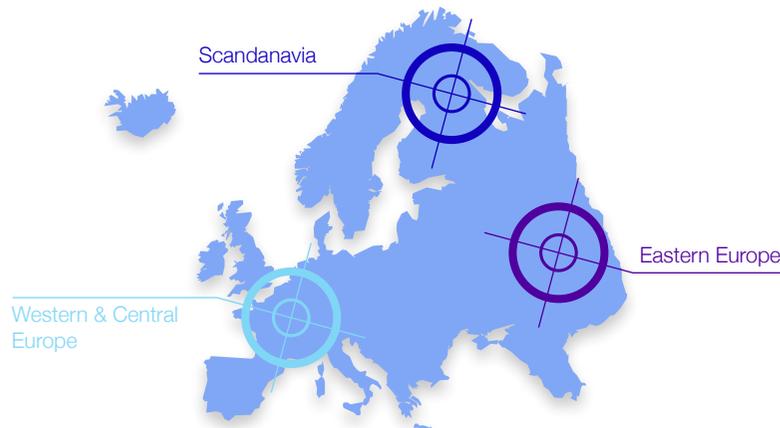
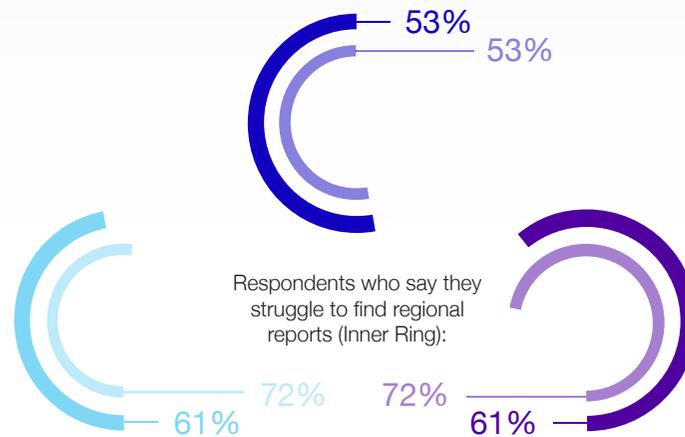


Fig 19: What European IT professionals want: by sub-region

Case study: Europe

Demand for localised content in the world's largest economies

If the tech industry's future growth path depends upon generating revenues in emerging economies, it also relies upon industrialised nations beyond North America.

Across western Europe, an average of 38% of IT professionals qualify as mavens, saying that they are "always" interested in white papers and similar content. This is significantly less than the 47% who respond similarly in the US.

The aggregate numbers for western Europe hide many local variations. In Italy, for example, only 21% are "always" interested in consuming white papers. The figures are similarly low (22%) among IT professionals in eastern and central Europe. Yet the proportion of mavens rises to 45% in the UK (similar to the US) and 67% in the Netherlands (which makes the Dutch the most avid consumers of vendor content).

Overall, a slight majority of European IT professionals (50.4%) exhibit a preference for localised, rather than global, vendor content.

Yet in Europe, as elsewhere, the proportion of IT professionals who want to read localised content but struggle to find it is extremely high. Indeed, the figures suggest that *all* of the European IT professionals who prefer to read localised IT content experience disappointment at its scarcity.

What action should vendors take in response? Our research suggests a hierarchy of content types that IT professionals in Europe find "extremely useful".

Do these preferences vary on a country-by-country basis within Europe? Yes, somewhat. However, the numbers also suggest that local analysis and thought leadership, blended with some global insights, would constitute an appealing combination for many European IT professionals.

Fig 18: Extremely useful: what European IT professionals want from vendors

- 1) Local analysis
- 2) Local thought leadership
- 3) Global analysis
- 4) Local statistics
- 5) Generic (global) thought leadership
- 6) Global statistics

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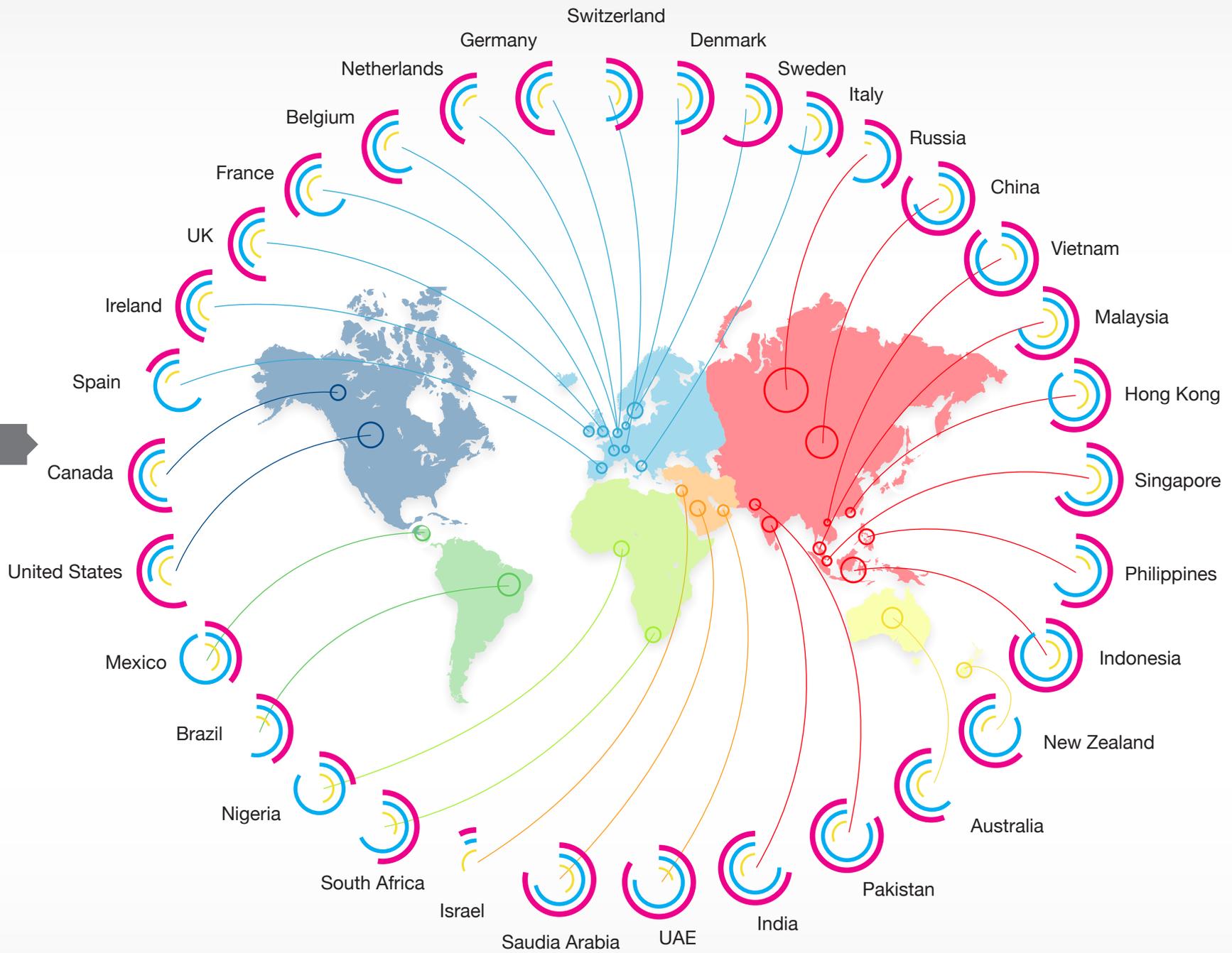


Figure 20:
The need for local IT content

- % who generally prefer to read IT content localised to their region
- % who struggle to find regional reports for IT challenges in their particular country
- % of Mavens of IT professionals

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Conclusion:

Advanced industrialised economies tend to be large, but slow-growing. Emerging economies tend to be small, but grow fast. Large economies like Germany and the US tend to be inward-looking and locally-focused. In Asia, by contrast, the degree of openness to "global" studies is striking.

The job of optimising marketing strategy in all of these environments may appear daunting. But amid the diversity, there are two pieces of good news for global IT vendors who wish to make a mark with owned content outside North America.

The first is that many respondents are satisfied with the global approach. For example, very nearly 50% of Europeans express a preference for global, rather than local, research -- a proportion that rises to nearly 60%+ in the Netherlands. Likewise, among the BRICs, for example, the IT professionals of Brazil emerge as relatively open to receiving "global" information. The numbers suggest that

many of these respondents are highly satisfied with what they're reading.

Paradoxically, as we've already noted, the second piece of good news involves the high levels of frustration that the rest of the world's IT professionals experience when faced with the scarcity of local content.

Against this backdrop, the injection of modest amounts of local content into white papers may generate a positive response.

Indeed, a modest re-balancing toward local content should allow vendors to retain the attention of "globalists" while appealing increasingly to "localists". On this basis, evolution, rather than revolution, seems like a sensible strategy, so long as it's underpinned by a willingness to respond to the preferences of IT professionals around the world who value vendor content so highly.