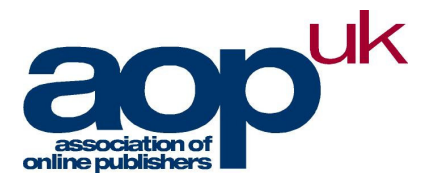




B2B Digital Content Research



Content

- Objectives
- Method
- Sample profile
- Usage of B2B websites vs. other media
- Usage of B2B websites in detail
- Role of B2B websites in PDM process
- Summary of findings

Objectives

- Innovation in digital content has radically changed the range of information sources available for work related purposes
- Researched the role of digital content in the B2B environment to help AOP promote B2B online publishing
- Research objectives:
 - To measure usage of digital content
 - To understand role and value in fulfilling work related information needs
 - To establish positioning against other types of information sources

Method

Methodology	Online self-completion
Sample source	Ipsos Online Access Panel and approved subcontractor Ciao
Fieldwork period	Friday 9 th – Monday 19 th May 2008
Sample definition	Business Decision Makers in GB – defined as: <ul style="list-style-type: none">• ABC1 full time working adults aged 18+• With input in purchase decision making for organisation
Sample size	751
Weighting	Data weighted by organisation size and region to be nationally representative of all business decision makers in GB (Source: CAPIBUS 2008)

NB: CAPIBUS is Ipsos MORI's F2F omnibus - interviewing 2,000 GB adults 15+ every week

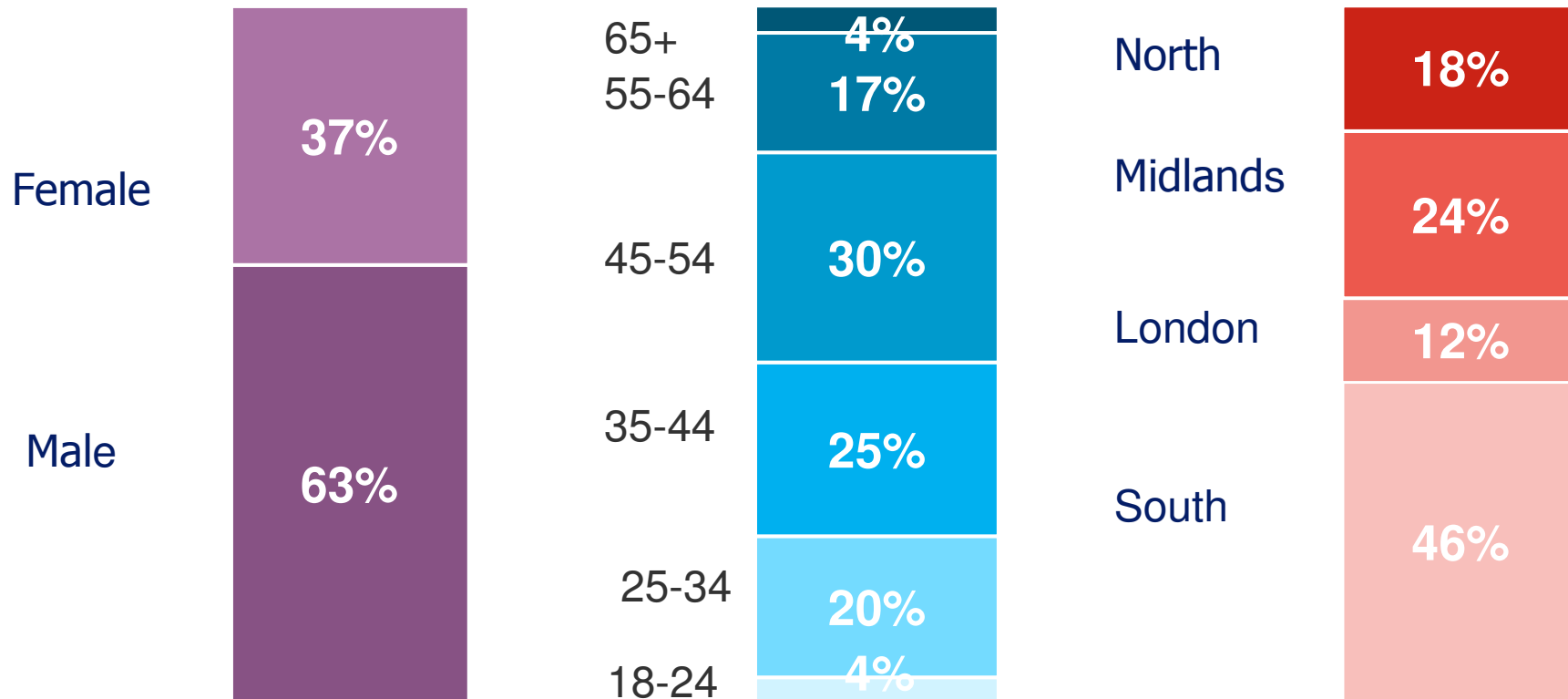
Sample profile

Sample Profile – Summary

- Our sample of Business Decision Makers is nationally representative of all BDM 18+ in GB in terms of demographics and organisation
 - Predominantly male (63% men vs. 37% women) – Q29
 - Aged 44 on average – Q30
 - Majority live in the South of England (58%) – Q31
 - 87% with managerial status – though the 13% who are not of managerial status are still involved in PDM process – Q1/Q2
 - 73% with final sign-off or significant responsibilities in PDM process - Q2
 - 80% budget holders – Q15
 - Work across a wide range of industry sectors, organisation size and area of work – Q4

Demographics

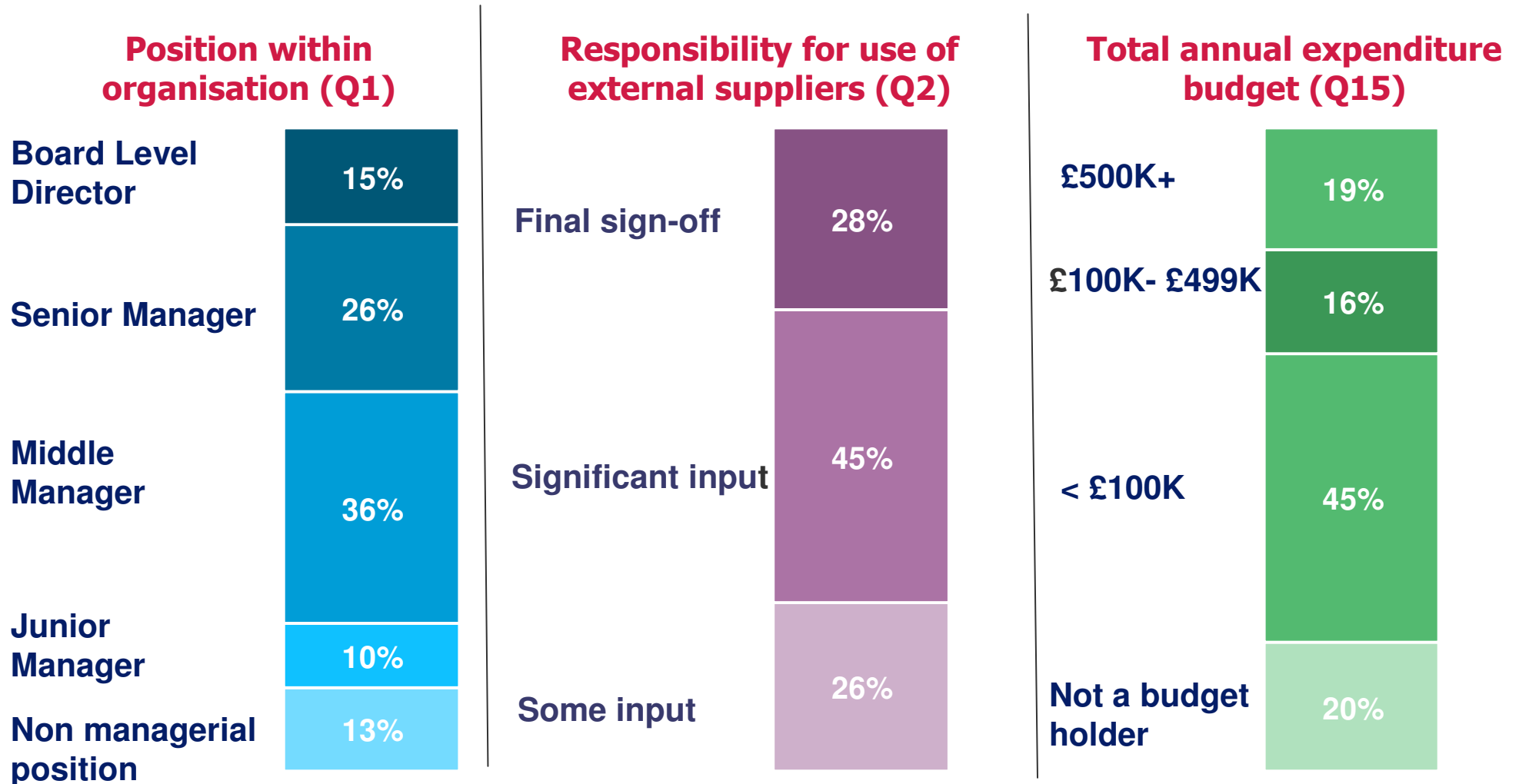
Our sample of BDM is nationally representative of all BDM in GB in terms of broad demographics – predominantly male, aged 44 on average and most living in the South of England



Base: 751, all respondents – Q29 (Gender) / Q30 (age) / Q31 (Region)

Seniority

Broadly representative of all BDM in terms of seniority and level of involvement in PDM

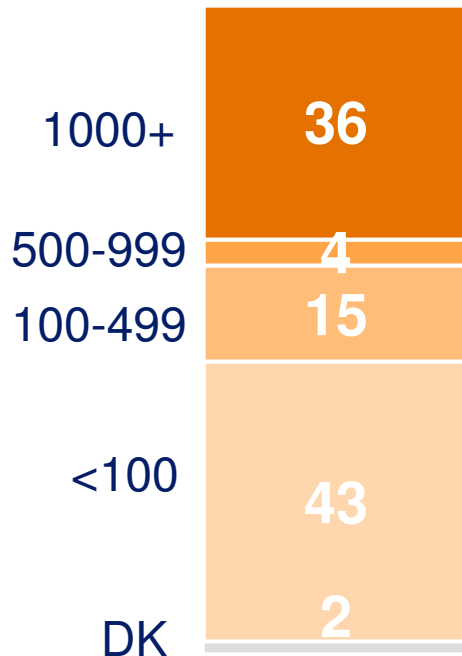


Base: 751, all respondents – Q1 / Q2 / Q15

Organisation

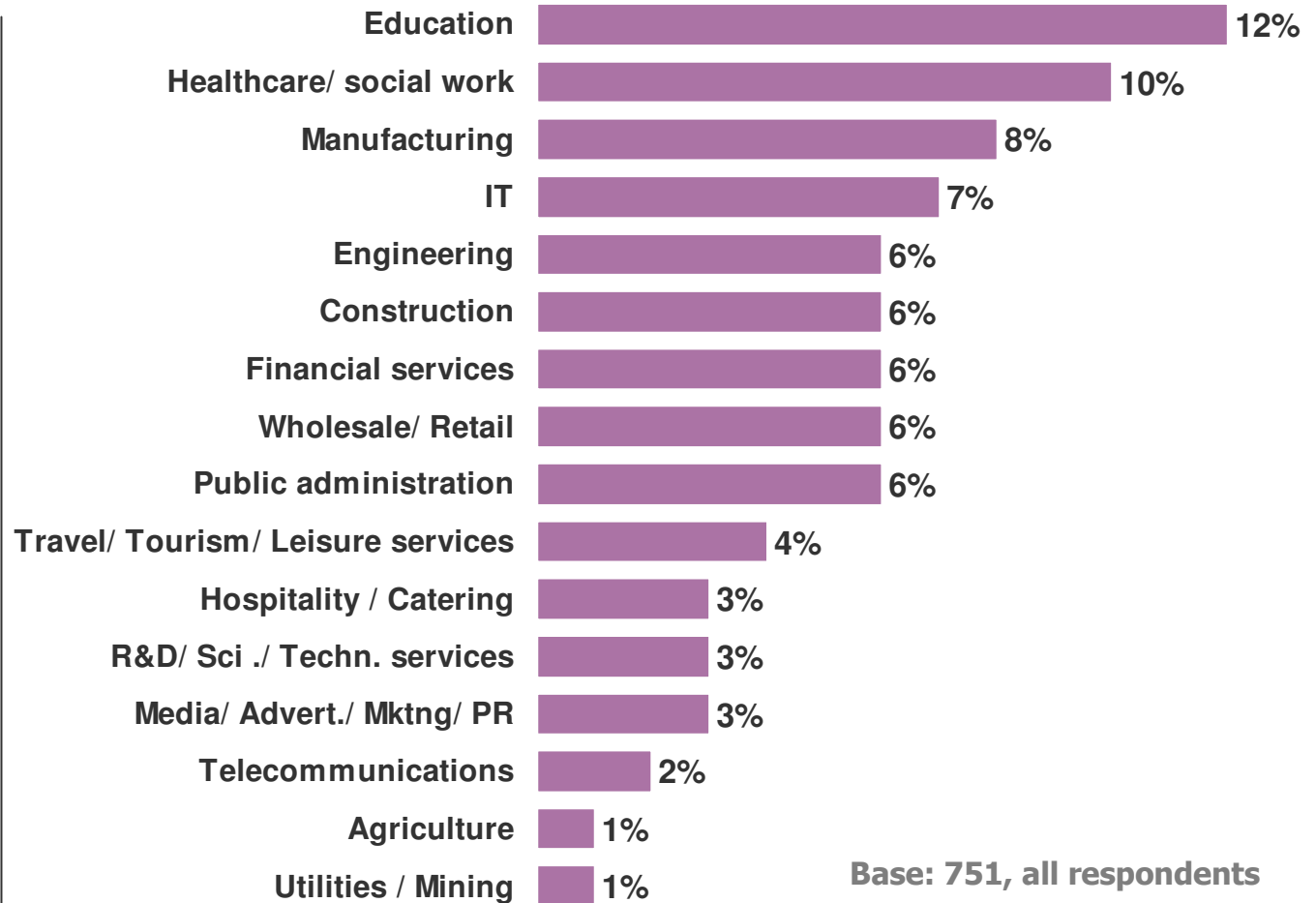
Good spread of organisation size (rep of all BDM in GB) and industry sectors

Size of organisation in the UK (Q5)



Average annual turnover (Q6) = £983M

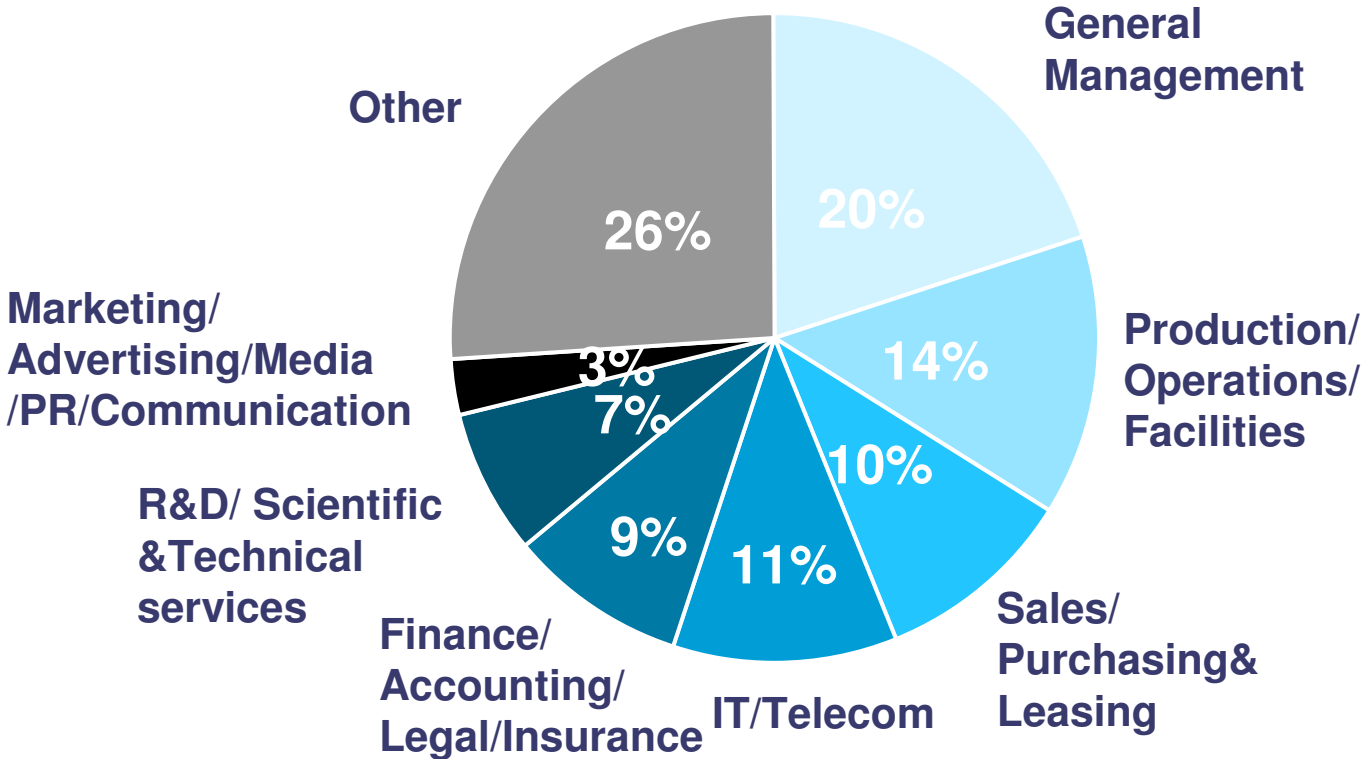
Industry sector (Q4)



Base: 751, all respondents

Area of work

Good spread of occupations with 1 in 5 in general management



Base: 751, all respondents – Q3 (Which one of the following best describes your main area of work?)

Usage of B2B websites vs. other media

Key findings (see notes)

- B2B websites are essential for doing business - Q7 (slide 14)
 - Most used and preferred source of information for most work related activities – Q9/Q12 (slide 14)
- B2B websites and B2B magazines complement each other – Q28 (slide 21)
- Perceptions of B2B websites are similar to that of B2B magazines (slide 19/20)
 - Seen as useful, insightful, trustworthy and authoritative – Q11
 - With the additional benefits of being accessible, modern, easy to use and up to the minute – Q11

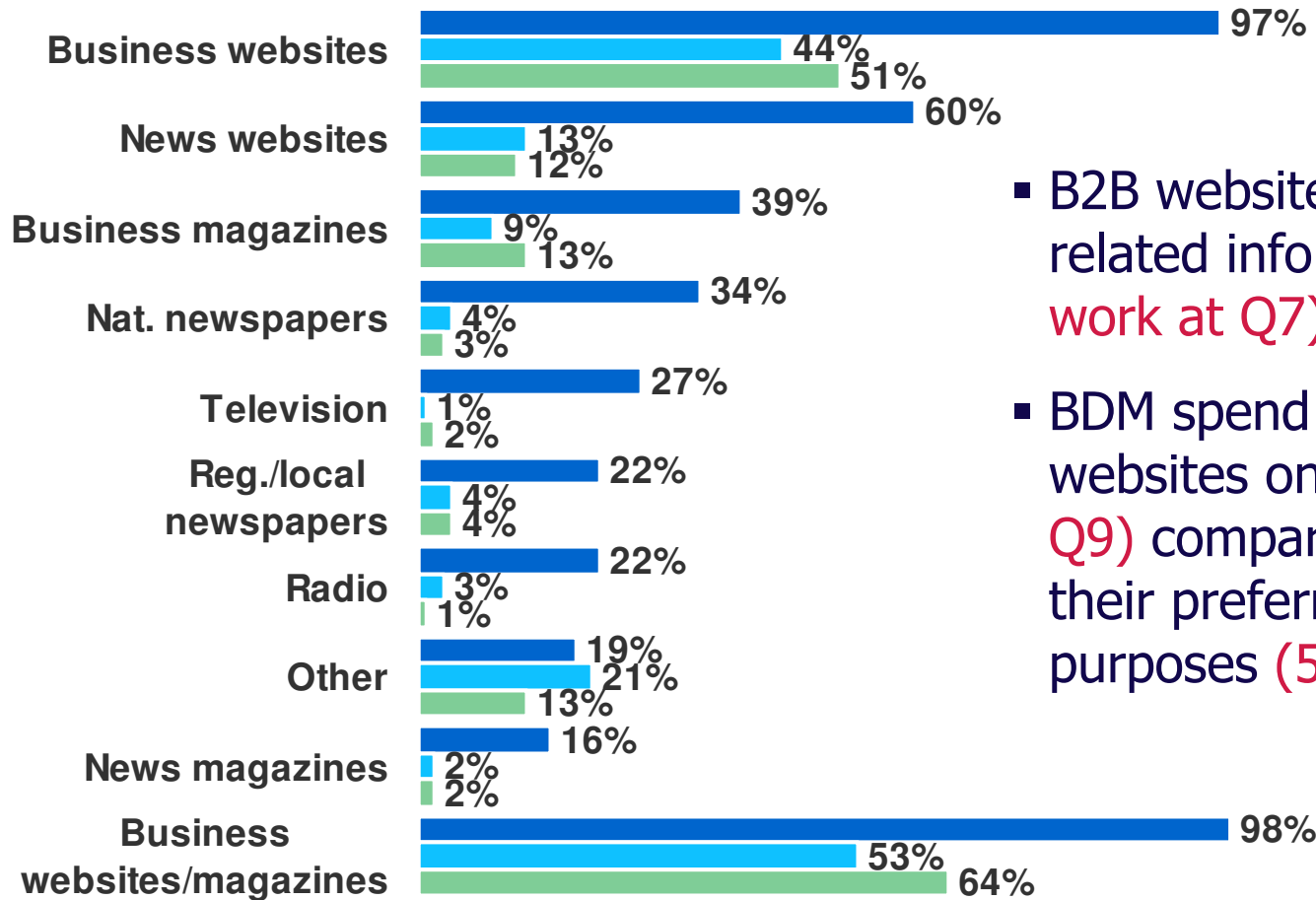
Definitions of media used for work purposes

Definitions used at Q7 - Which of the following media do you use for work purposes - whether you're at work, at home or on the move?

News websites	Websites or portals that provide general news and information, such as bbc.co.uk/news , timesonline.co.uk , google.co.uk/news etc.
Business websites	Websites that provide news, information, products or services relevant to your work and business needs e.g. websites specific to your industry, profession or job role such as: <ul style="list-style-type: none"> • general and trade news websites e.g. computerweekly.com, zdnet.co.uk, accountancyage.com etc. • industry organisations or professional bodies websites e.g. icaew.co.uk (Institute of Chartered Accountants in England & Wales) etc. • suppliers or manufacturers of products & services • retailers/brokers websites • product review/comparison websites • clients/competitors websites etc.
News magazines	The Economist, The Spectator, The Week etc.
Business magazines	Magazines that provides news and information relevant to your work and business needs e.g. magazines specific to your industry, profession or job role such as Accountancy, ComputerWeekly, MarketingWeek, Financial Director, Personnel Today etc.
National newspapers	Financial Times, The Times, Daily Mirror etc.
Regional/local newspapers	Manchester Evening News etc.
Television	Terrestrial and digital channels including news and business channels such as CNN, CNBC, Bloomberg etc.
Radio	Analogue and digital radio stations, including news and business stations such as BBC Radio 4, World Service, LBC News etc.

B2B websites preferred media for work

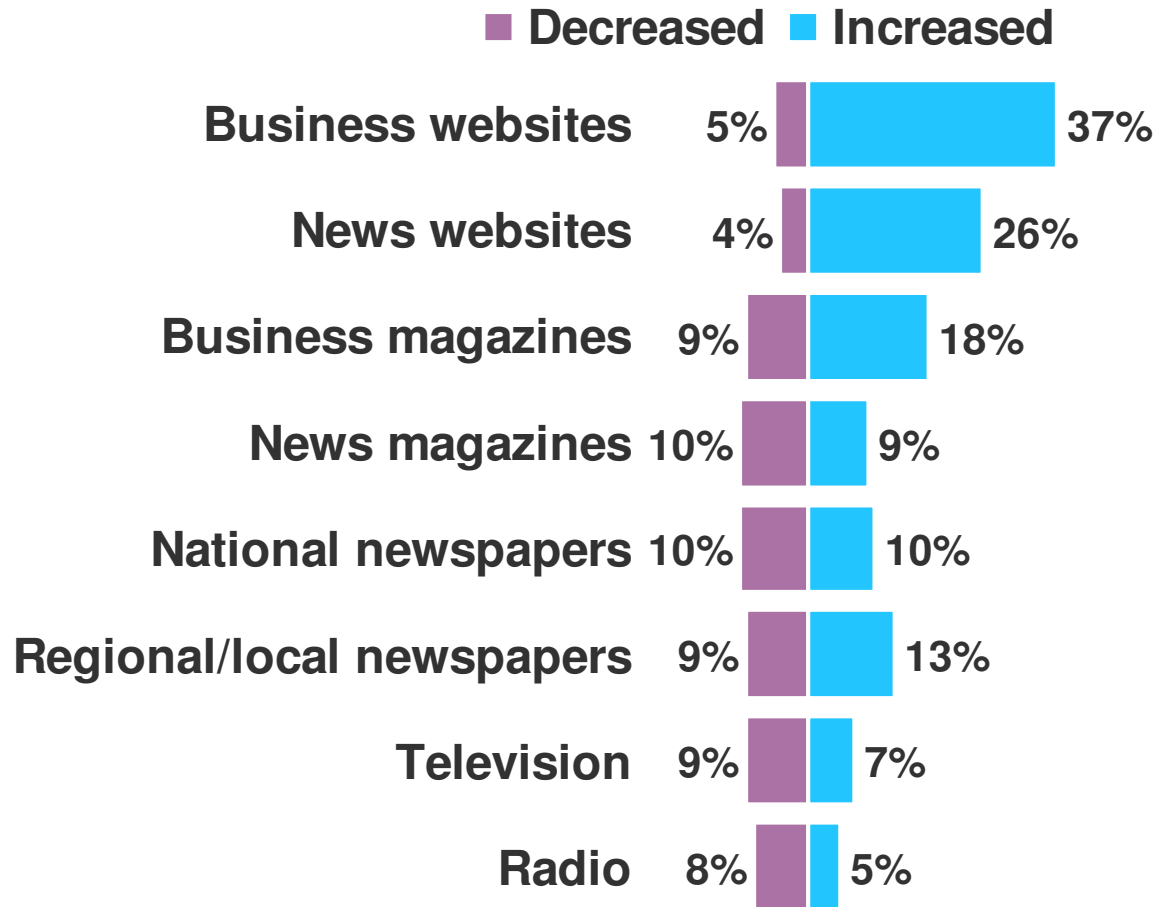
- Media used for work (Q7)
- Spend most time using for work on average day (Q9)
- Preferred source for work (Q12)



- B2B websites are a key source of work related information (97% use it for work at Q7)
- BDM spend the most time using B2B websites on an average day (44% at Q9) compared to other media and it is their preferred media for work purposes (51% at Q12)

Base: 751, all respondents - Q7 / Q9 / Q12

Change in usage for work over last 12 months



- Significant increase in usage for B2B websites, followed by news websites (37% increased usage)
 - especially among middle managers (44% increased usage) and budget holders (43% increased usage amongst £100+ budget holders)
- Usage of business magazines has also increased in the past 12 months (18% increased usage)

Base: 751, all respondents

Q10 How has your usage of the following media changed over the last 12 months for work purposes?

Increased/, decreased or stayed the same

Media used by activity – Summary table

- B2B websites and magazines are the top sources of information for key business related activities
- News websites are most used for general news
- For recruitment and looking for a job, national and local newspapers compete with B2B media

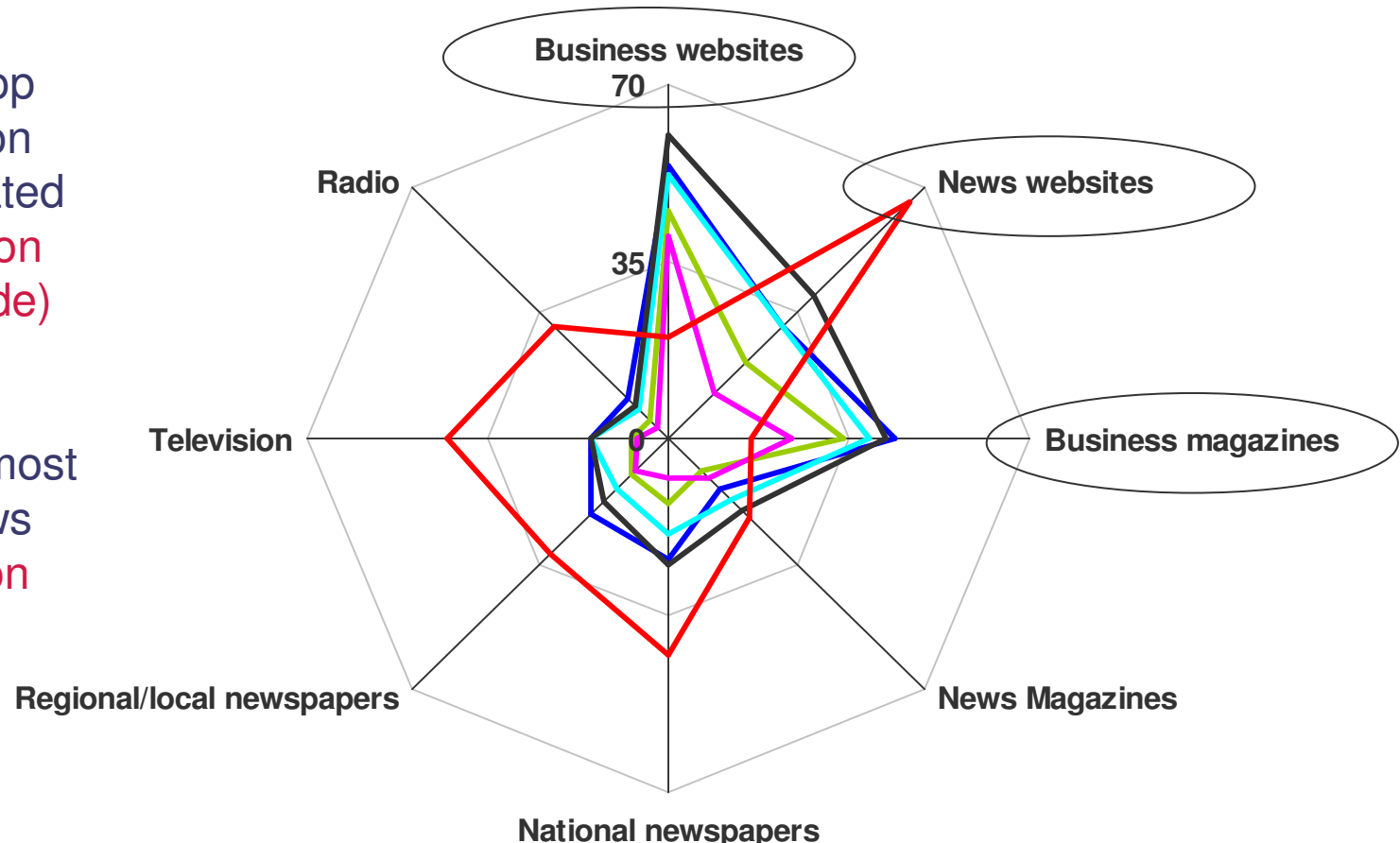
	Business websites %	News websites %	Business magazines %	News Magazines %	National newspapers %	Regional/local newspapers %	Television %	Radio %	Other %
Sector news	54	31	44	14	24	21	15	11	14
Sector data reports	45	21	34	9	13	10	7	5	14
Research/inform business decisions	56	29	39	16	16	12	10	7	15
Research/inform purchase decisions	55	21	33	12	12	11	10	6	21
Interact with people in industry/sector	40	13	24	11	8	9	6	3	25
Find business opportunities	48	20	36	13	18	19	8	5	15
Conduct market analysis	36	19	25	11	16	14	8	4	13
Look for job	42	14	28	9	30	36	4	3	20
Recruit new staff	29	7	22	6	21	38	3	3	24
Practical tips/advice	52	31	39	17	19	14	15	8	15
As reference source	60	40	42	20	25	18	15	9	20
General news	20	66	16	22	43	32	43	31	6

Base: 751, all respondents – Q8 (Thinking about your role at work and all elements that it involves, please indicate which of the following media you use for different work activities?)

Media used by activity (1)

- Sector news
- Interact with people in industry/sector
- As reference source
- Sector data reports
- Practical tips/advice
- General news

- B2B websites and magazines are the top sources of information for key business related activities (as shown on table on previous slide)
- News websites are most used for general news (as shown on table on previous slide)

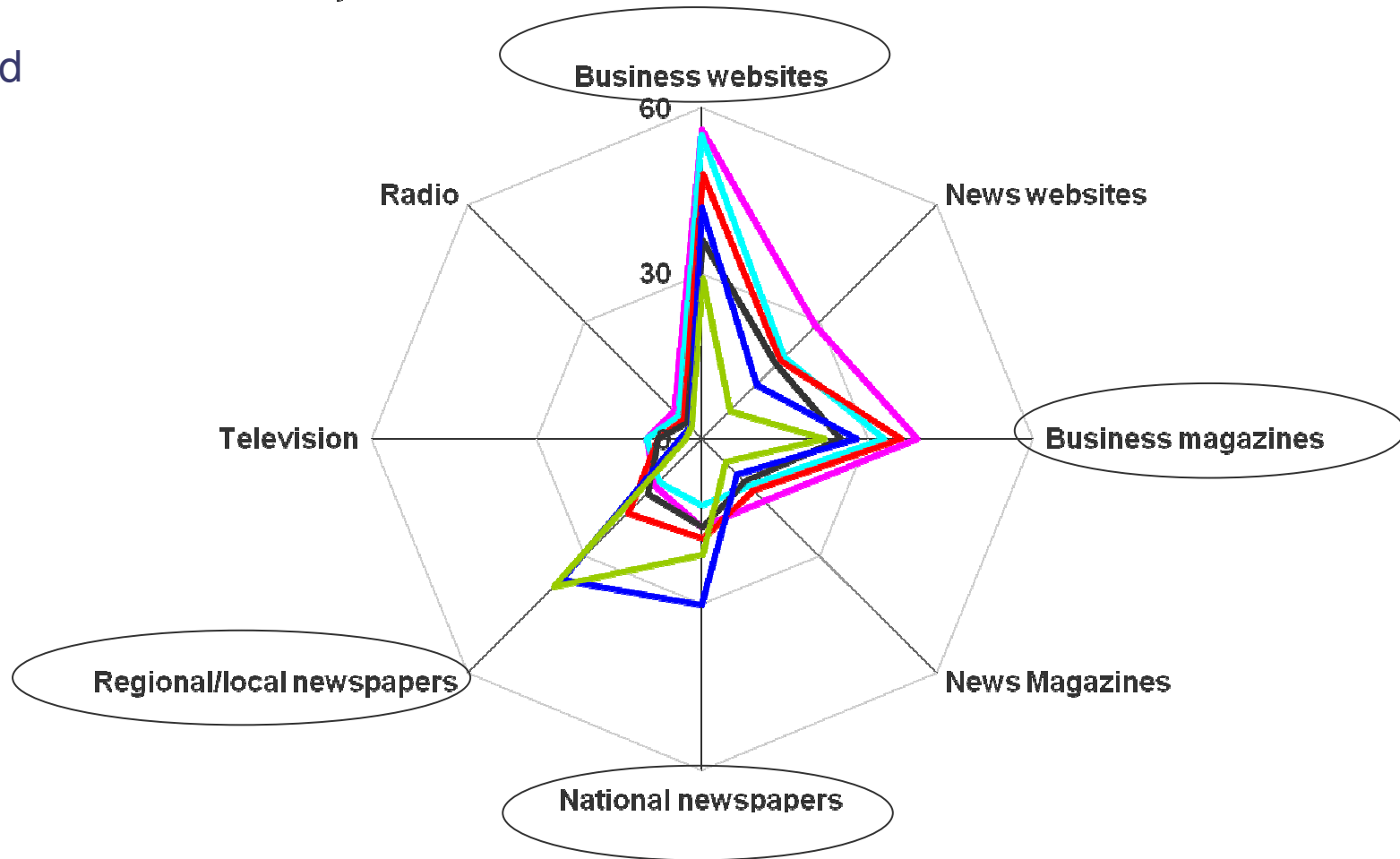


Base: 751, all respondents – Q8 (Thinking about your role at work and all elements that it involves, please indicate which of the following media you use for different work activities?)

Media used by activity (2)

- Research/inform business decisions
- Find business opportunities
- Look for job
- Research/inform purchase decisions
- Conduct market analysis
- Recruit new staff

- For recruitment and looking for a job, national and local newspapers compete with B2B media (as shown on table on previous slide)



Base: 751, all respondents – Q8 (Thinking about your role at work and all elements that it involves, please indicate which of the following media you use for different work activities?)

Brand perceptions – Summary table

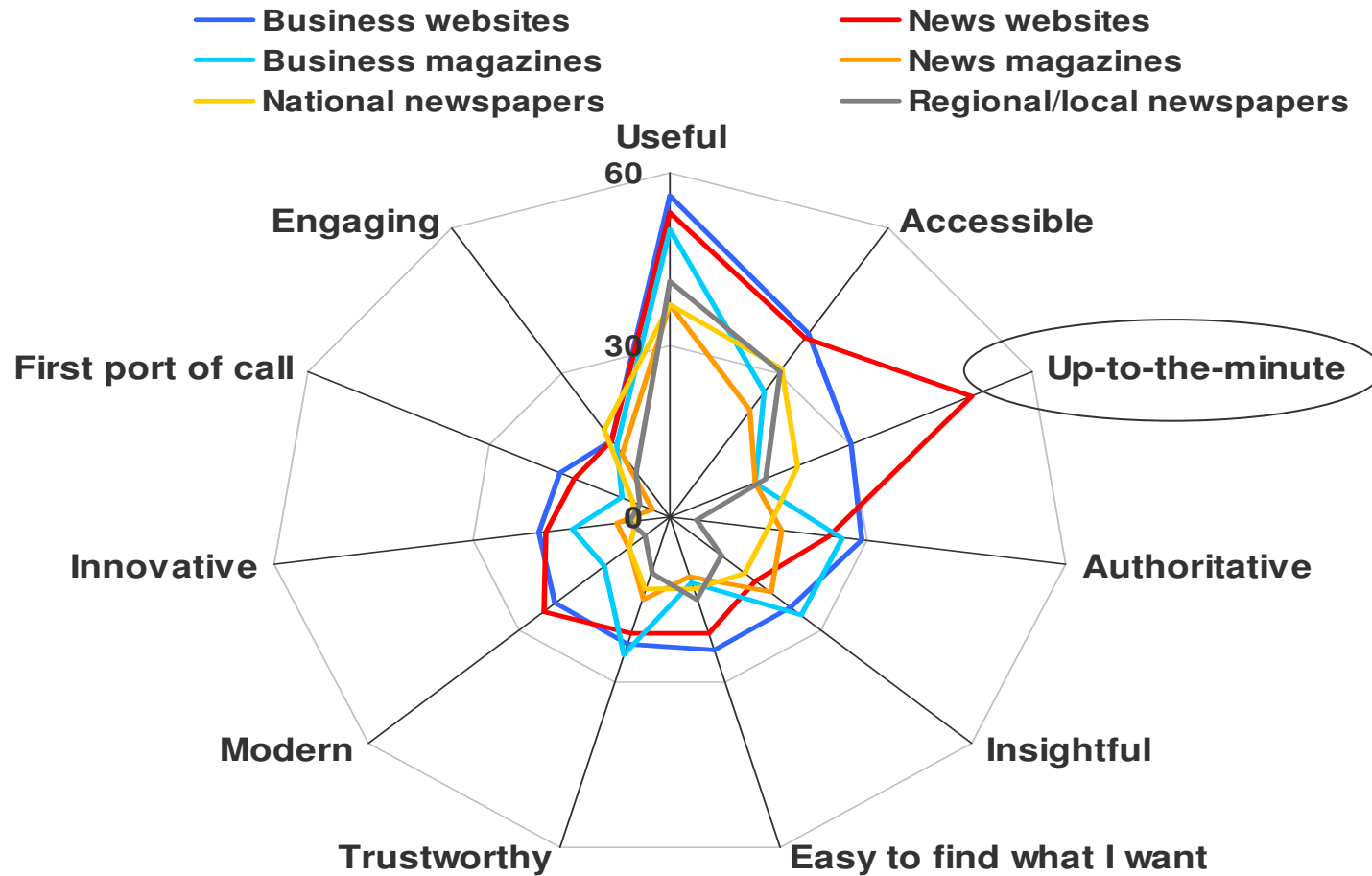
- B2B websites and news websites have the best image (scoring best on most characteristics), followed by B2B magazines
- Regular users of B2B websites and users of delivery mechanisms are more likely to find B2B websites engaging (see notes)

	Business websites %	News websites %	Business magazines %	News magazines %	National newspapers %	Regional/local newspapers %	Television %	Radio %
Useful	56	53	50	37	37	41	36	31
Accessible	38	37	26	22	31	30	32	32
Up-to-the-minute	30	50	14	14	21	16	33	27
Authoritative	29	24	26	17	15	4	11	10
Insightful	24	17	26	20	15	10	12	11
Easy to find what I want	24	21	12	11	13	15	9	4
Trustworthy	23	21	25	15	13	10	9	14
Modern	23	25	13	8	8	5	19	9
Innovative	20	19	15	8	5	6	11	6
First port of call	18	16	8	3	6	5	7	5
Engaging	16	16	15	13	18	9	30	18

Base: 751, all respondents – Q11 (Thinking about the different media that you use for work purposes, which of the following attributes would you say best apply to each medium?)

Brand perceptions – all media

- B2B websites and news websites have the best image (scoring best on most characteristics), followed by B2B magazines
- Regular users of B2B websites and users of delivery mechanisms are more likely to find B2B websites engaging (see notes in previous slide)

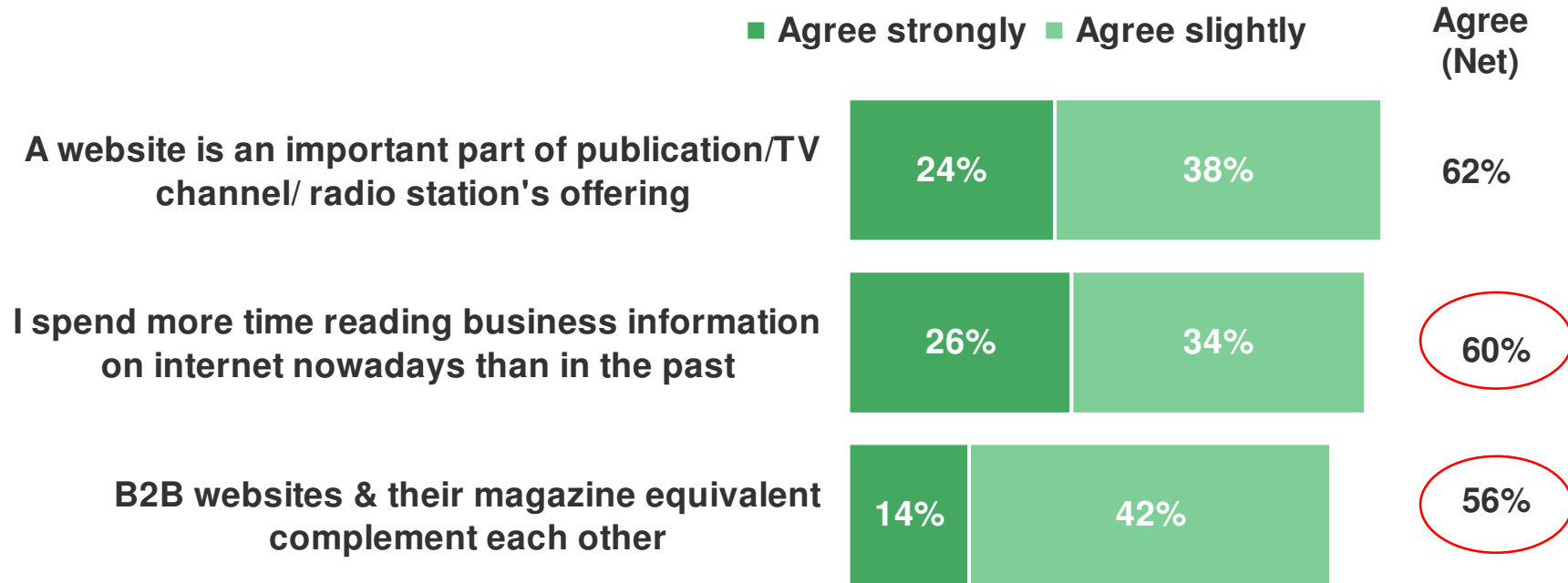


Base: 751, all respondents – Q11 (Thinking about the different media that you use for work purposes, which of the following attributes would you say best apply to each medium?)

B2B online and offline are complementary



- As shown below, although 60% spend more time reading business information online nowadays, 56% agree that B2B websites and magazines complement each other - and this is also the case among regular B2B website users (65% agree vs. 56% all BDM).



Base: 751, all respondents – Q26/28 (Please indicate how strongly you agree or disagree with each of the following statements about your use of business websites for work purposes)

B2B online and offline – Summary tables

Usage (Q8)

- Of those who use both, BDM use B2B websites slightly more than B2B magazines for various work purposes – especially to interact with peers.

	Business Websites %	Business Magazines %
As reference source	75	67
Research/inform business decisions	71	66
Practical tips/advice	69	65
Sector news	68	73
Research/inform purchase decisions	67	56
Sector data reports	61	56
Find business opportunities	59	52
Look for job	57	46
Interact with people in industry/sector	54	37
Conduct market analysis	45	36
Recruit new staff	38	33
General news	23	23

Brand perception (Q11)

- Users of both B2B magazines and websites have a similar perceptions of both platforms – useful, authoritative, trustworthy, insightful
- B2B websites seen as more accessible, up-to-the minute, modern, easy to use and a first port of call
- B2B magazines are seen as engaging as the websites by those who use both

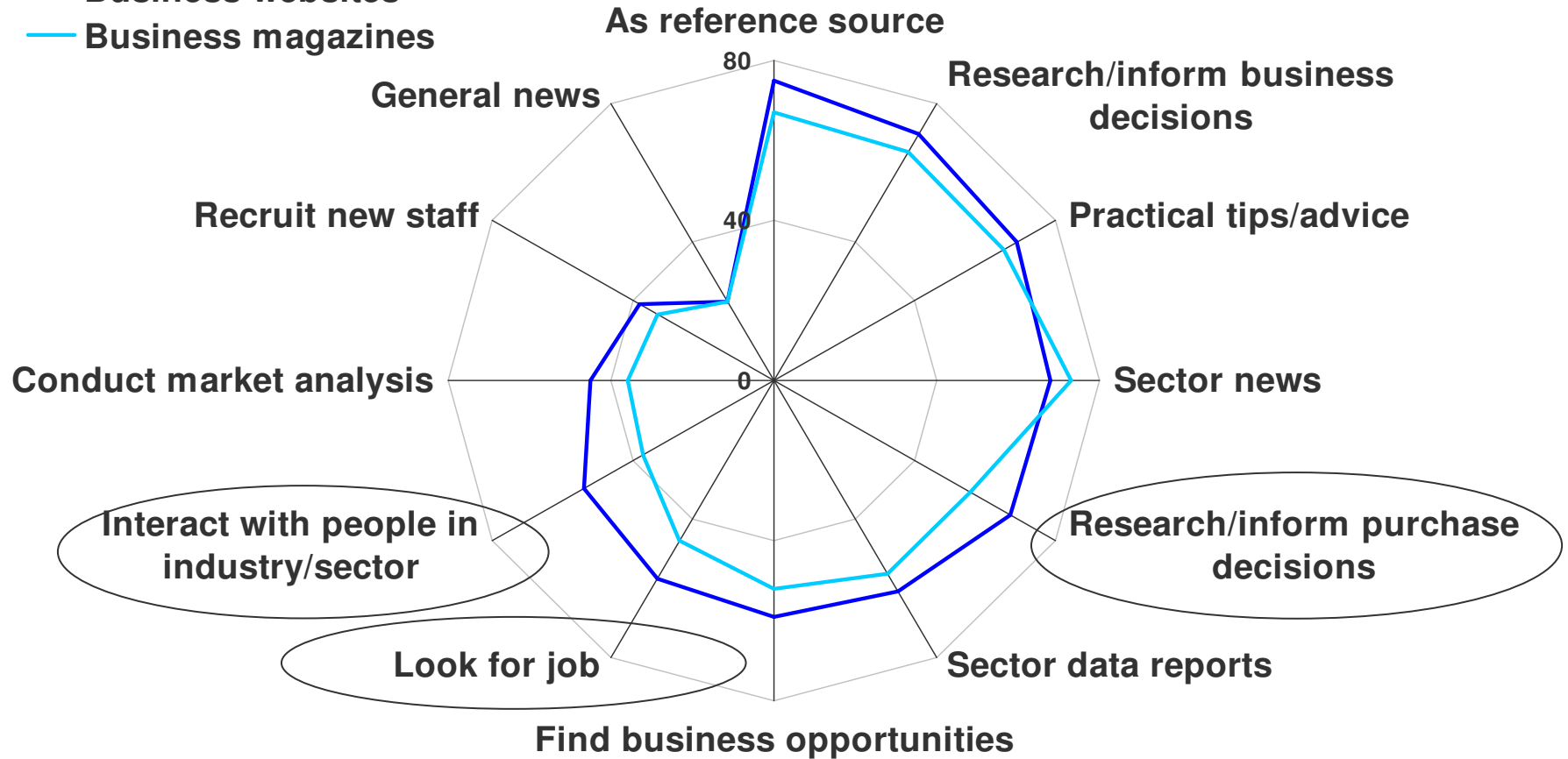
	Business Websites %	Business Magazines %
Useful	70	66
Accessible	52	40
Authoritative	45	43
Up-to-the-minute	42	21
Trustworthy	32	39
Modern	30	17
Easy to find what I want	30	17
Insightful	28	34
Innovative	25	20
First port of call	24	15
Engaging	21	21

Base: 295, Those who use both B2B websites and magazines – Q8 (Thinking about your role at work and all elements that it involves, please indicate which of the following media you use for different work activities?) / Q11(Thinking about the different media that you use for work purposes, which of the following attributes would you say best apply to each medium?)

B2B online and offline – usage

- Of those who use both, BDM use B2B websites slightly more than B2B magazines for various work purposes – especially to interact with peers.

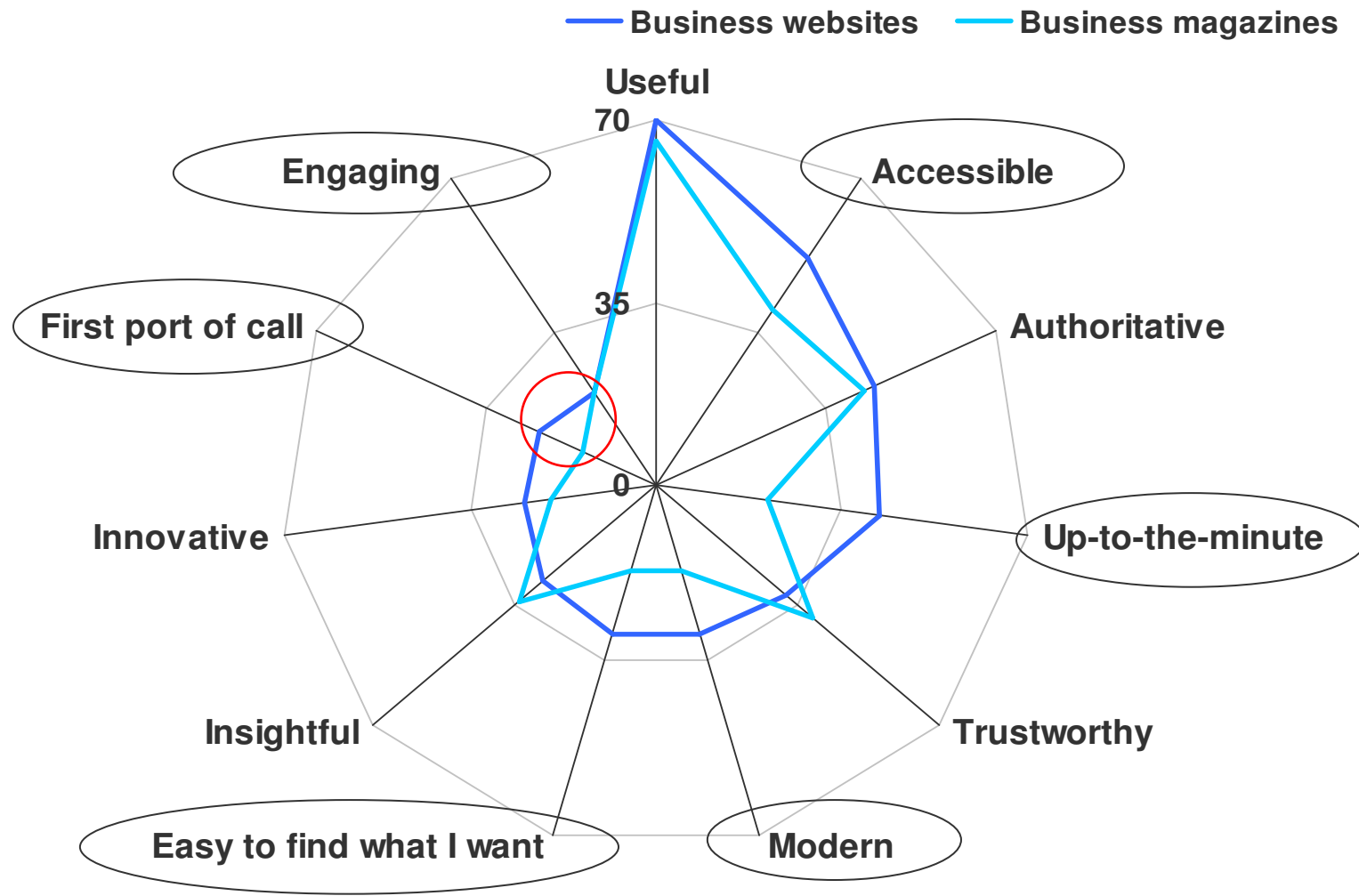
- Business websites
- Business magazines



Base: 295, Those who use both B2B websites and magazines – Q8 (Thinking about your role at work and all elements that it involves, please indicate which of the following media you use for different work activities?)

B2B online and offline – brand perception

- Users of both B2B magazines and websites have a similar perceptions of both platforms – useful, authoritative, trustworthy, insightful
- B2B websites seen as more accessible, up-to-the minute, modern, easy to use and a first port of call
- B2B magazines are seen as engaging as the websites by those who use both



Base: 295, Those who use both B2B websites and magazines – Q11(Thinking about the different media that you use for work purposes, which of the following attributes would you say best apply to each medium?)

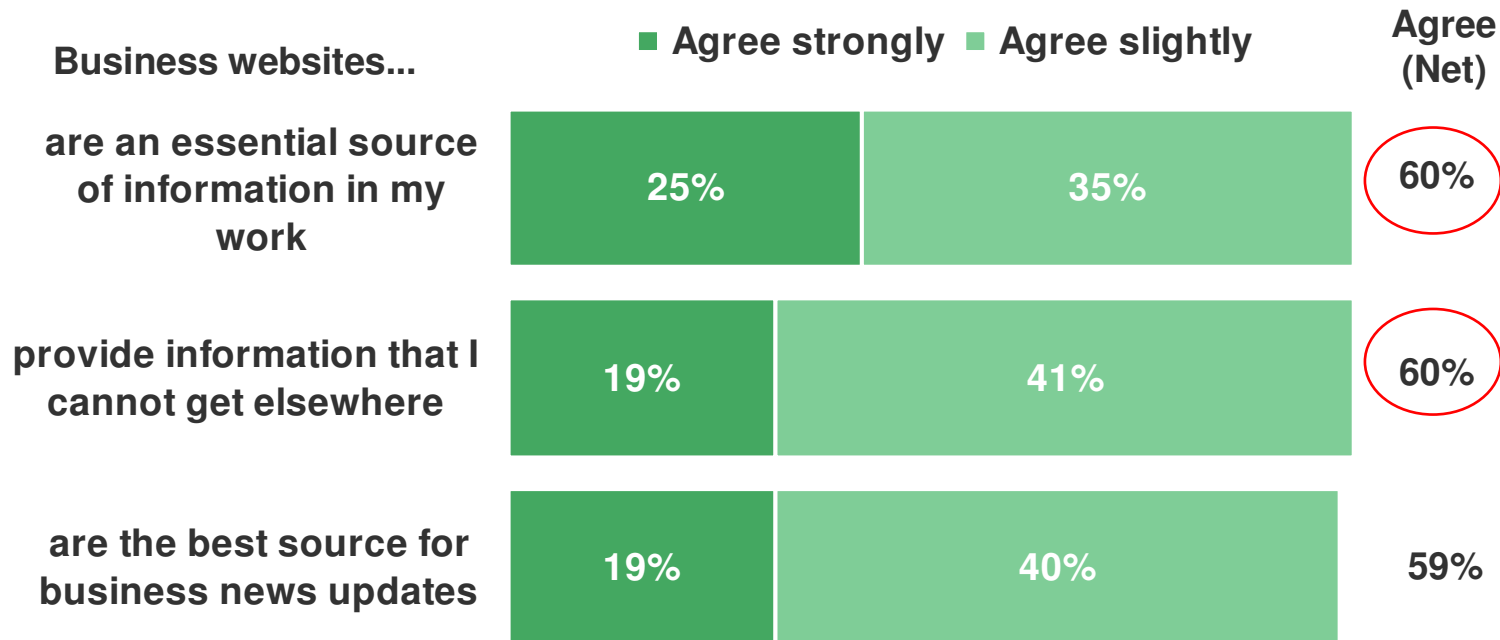
Detailed B2B website usage

Key findings (see notes)

- B2B websites are seen as an essential source of information for work (60% agreeing with this statement at Q26/28 – slide 27)
 - 74% of all BDM use B2B websites at least once a week – Q21 (slide 28)
 - 38% are regular users (at least once day) and have similar profile to all BDMs – Q21
 - 82% use some form of digital delivery mechanisms on B2B websites – Any at Q22 (slide 30)
- Most used tools are e-mail alerts/newsletters, peer reviews, job boards and community/forums/discussions - Q22 (slide 30)
- B2B websites offer instant access to information, save time, offer innovative and engaging ways to access information and allow BDM to interact with peers more efficiently – % agreeing with different statements at Q26/28 (slide 35)
- Usage of delivery mechanisms has had a very positive impact on perceptions of B2B websites. B2B websites are found to offer more engaging content and advertising than other business information sources. – 52% agree with statement at Q26/28 – slide 35
- 39% expect their usage of innovative delivery mechanisms to grow in the future – Q25 (slide 33)
 - Alerts, peers reviews, RSS feeds, online seminars, virtual exhibitions and blogs & forums/communities have the most potential for growth – Q22

B2B websites are seen as essential for work

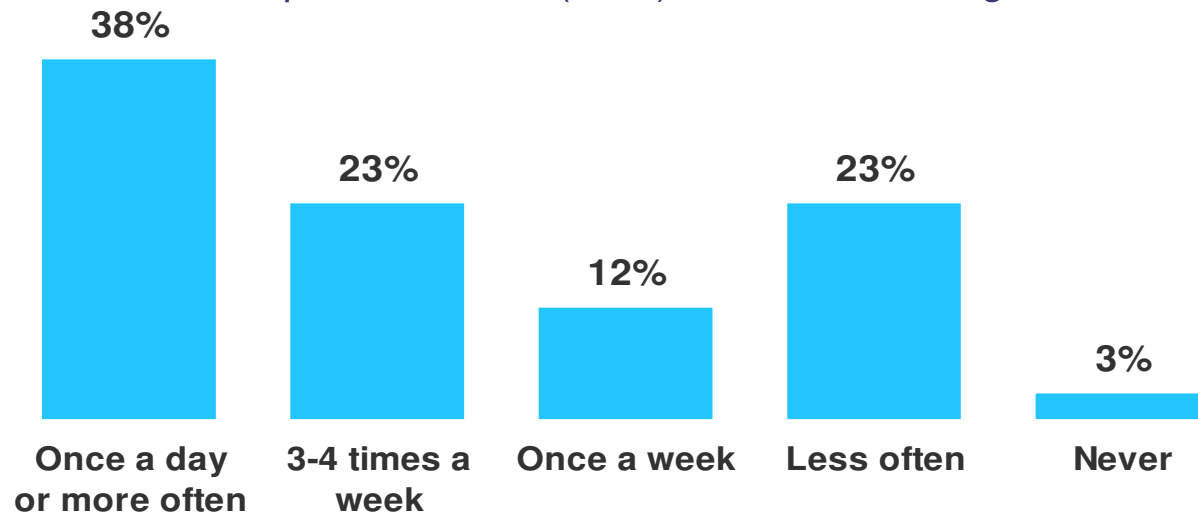
- 60% of BDM consider B2B websites an essential source of information for work, and this increases among those who use B2B sites at least once a day (76% agree)
- B2B websites also provide info that BDM cannot get elsewhere (60% agree)



Base: 751, all respondents – Q26/28 (Please indicate how strongly you agree or disagree with each of the following statements about your use of business websites for work purposes)

Frequency of visiting B2B websites

- Most BDM use B2B websites at least once a week (74%) with over a third using them at least once a day. Usage is more frequent among:
 - Senior BDM (47% of board director level use B2B sites at least once a day)
 - Those who work in medium sized organisations (50%)
 - Those in sales/marketing/PR/Adv occupations (48%)
 - Those involved in PDM process for IT (44%) and Financial/legal services (48%)



Base: 751, all respondents – Q21 (On average, how often would you say you visit business websites for work purposes?)

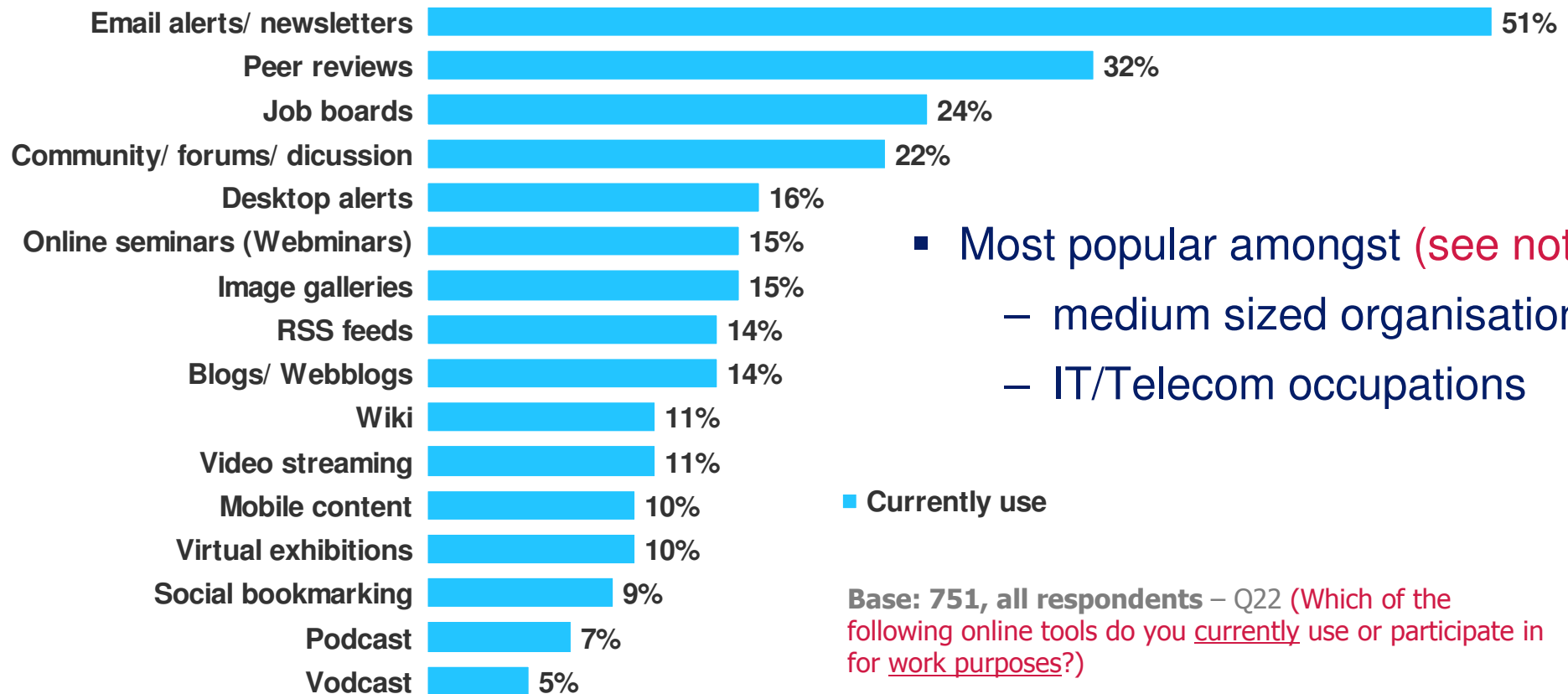
Profile of regular users of B2B sites

- Regular B2B website users are very similar to all BDM, though :
 - Slightly younger (av. age 42 vs. 44) and more likely to be 35-44 (31% vs. 25% all) – Q30
 - More likely to be Managers or above (92% vs. 87% all BDM) – Q1
 - More likely to be involved in making purchase decisions for (Q13):
 - IT products/services (52% vs. 46% total)
 - Financial/legal products/services (30% vs. 24%)
 - Similar spread of industry (Q4), occupations (Q3) and organisation size (Q5) than all BDM

NB: Regular users of B2B websites defined as using B2B websites at least once a day – Q21

Current usage of B2B delivery mechanisms

- 82% of all BDM use **at least one** B2B digital delivery mechanism for work (Q22 – Any) - rises to 91% among regular B2B websites users
- Email alerts/newsletters are the most popular digital mechanisms (51%), followed by platforms which provide feedback/interaction with peers (Peer reviews 32%, job boards 24%, Community /forums/ discussion 22%)



- Most popular amongst (see notes):
 - medium sized organisations
 - IT/Telecom occupations

■ Currently use

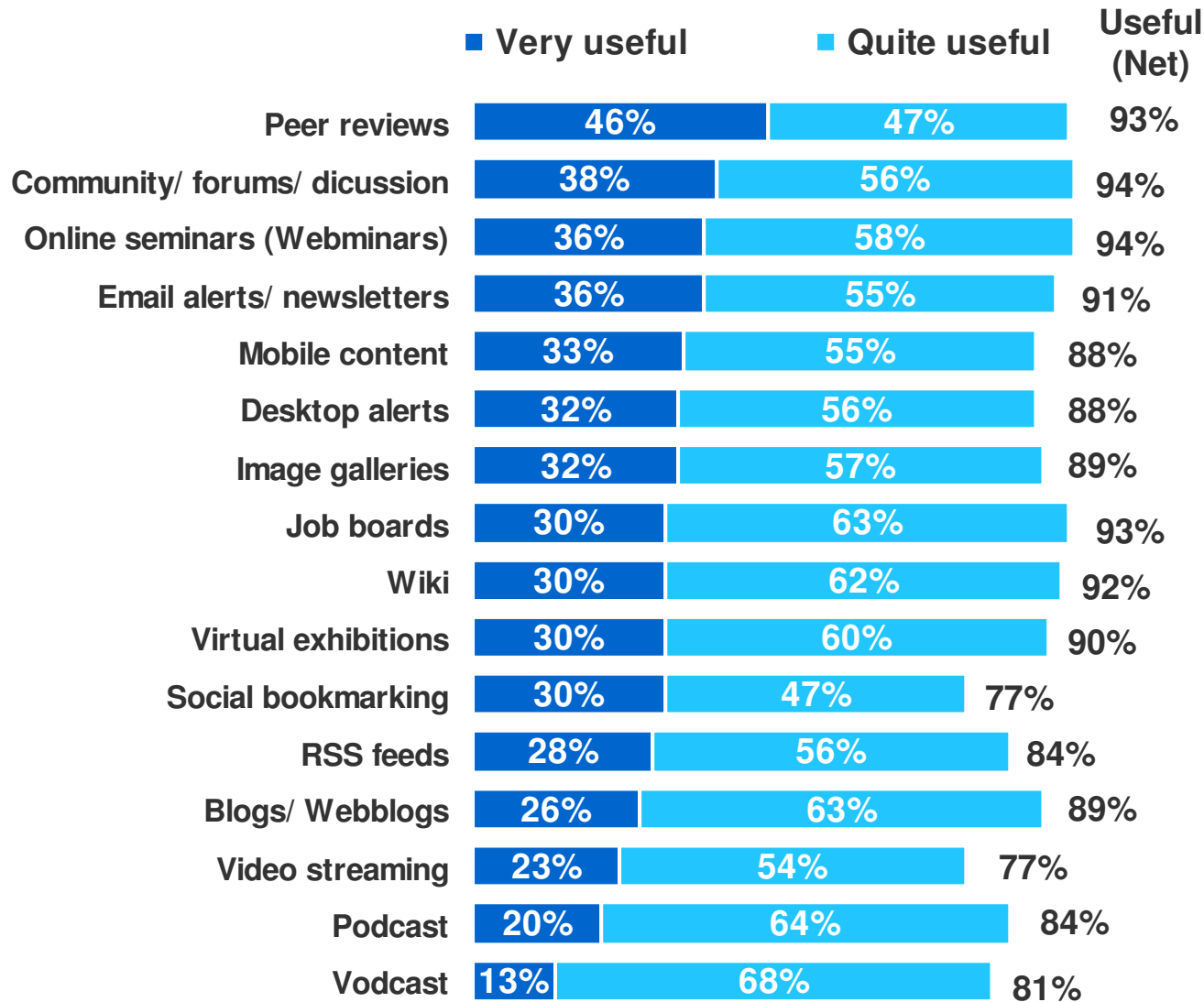
Base: 751, all respondents – Q22 (Which of the following online tools do you currently use or participate in for work purposes?)

Profile of users of B2B delivery mechanisms

- A core minority (17%) are currently using five or more of these delivery mechanisms – Q22
- Those early adopters tend to be more female (41% vs. 37% all BDM – Q29), slightly younger (61% under 45 – Q30) and more likely to live in London (21% vs. 16% all BDM – Q31). Also more likely to :
 - Work in the IT or Education sector – Q4
 - Work in an IT/Telecom occupation (23% vs. 11% of all BDM) – Q3
 - Have final sign off on purchases (34% vs. 28%) – Q2
 - Work in medium sized organisations – Q5

NB: Regular users of B2B websites defined as using B2B websites at least once a day – Q21

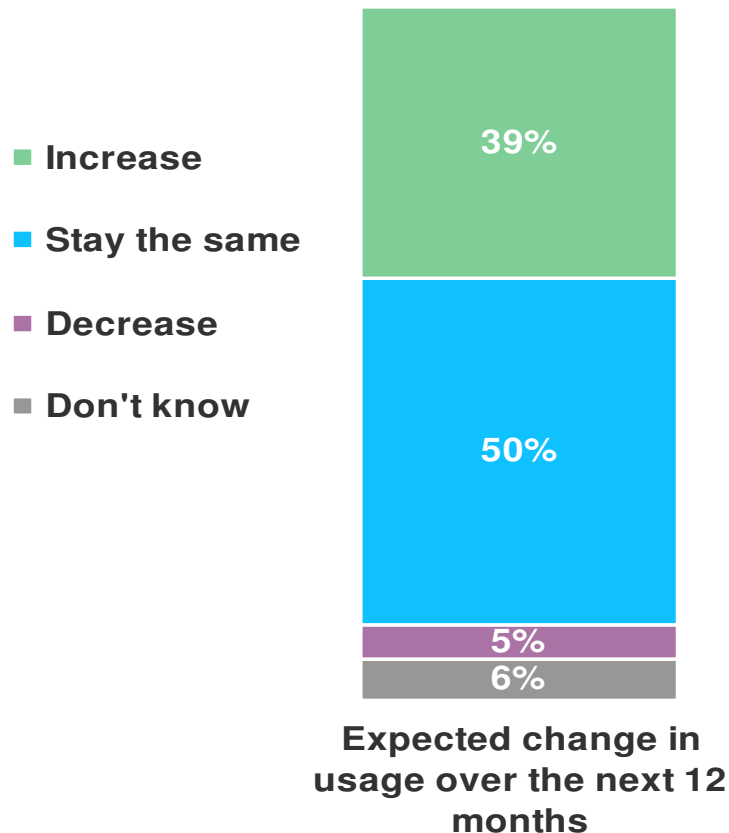
Usefulness of B2B delivery mechanisms



- Peer reviews and networking mechanisms (community/forums/discussion and Webinars) are most useful
- Although usage of some mechanisms is still low (e.g. 11% use wikis, 10% use mobile content and 10% use virtual exhibitions at Q22), they are found useful

Base: All who currently use the digital mechanism/platform – Q24 (How useful do you find each of the online tools that you currently use for your work?)

Future usage of B2B delivery mechanisms



- BDM are keen to use these new delivery mechanisms in the future (89% will increase their use or use them as much as before)
- 2 in 5 BDM expect their usage to increase – this rises to 53% of those who regularly use B2B websites (at least once a day at Q21)
- Expect their usage to increase (see notes for %):
 - Medium / large organisations – Q5
 - Sales/Marketing/Media/Advertising/PR/Com - Q3
 - Large expenditure budget holders – Q15
 - Involved in PDM for IT and vehicles/premises categories – Q13

Base: 751, all respondents – Q25 (How do you think your usage of these online tools for work purposes will change over the next 12 months?)

Future usage of B2B delivery mechanisms

- As well as desktop alerts, online seminars and virtual exhibitions are tools that appeal to BDM and their usage is expected to increase in the future.



- Those who regularly use B2B websites (at least once a day at Q21) and these mechanisms (Use any at Q22) are more likely to expect to use the following :

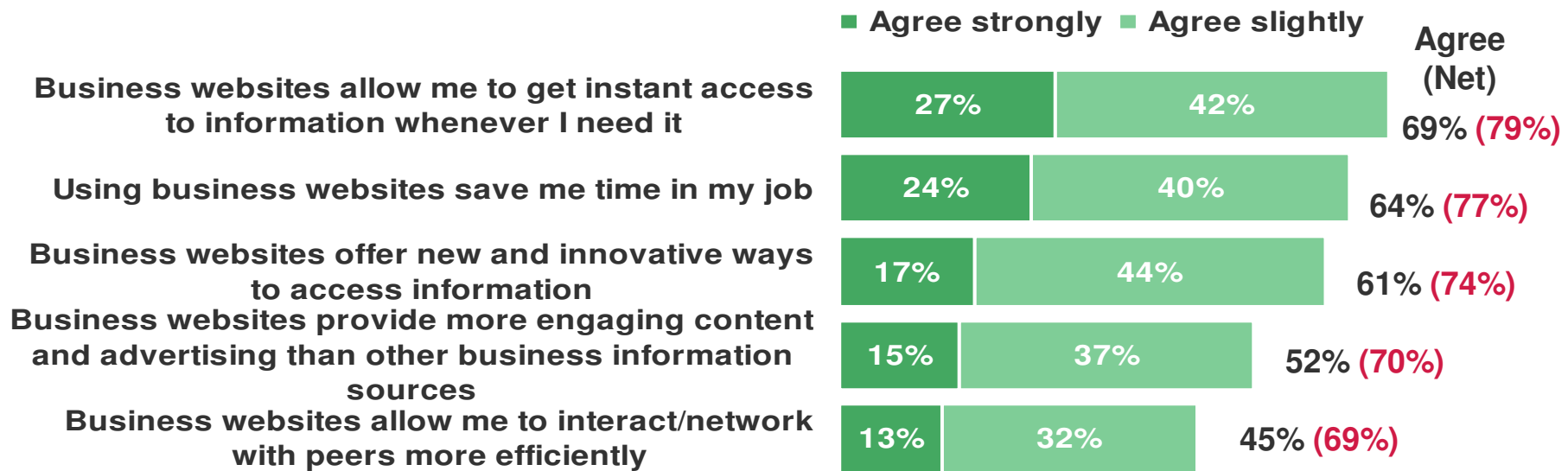
- Online seminars
- Virtual exhibitions
- RSS feeds
- Blogs
- video streaming, podcasts & vodcasts

■ Expect to use but not currently

Base: 751, all respondents – Q23 (Which of the following do you expect to use or participate in the next 12 months, for work purposes?)

Key benefits of B2B websites

- Instant access, time saving and ability to interact are key benefits of using B2B websites (see statements below)
- Regular users of B2B sites and delivery mechanisms are even more likely to agree (notes and % in brackets)
- Those working in sales/marketing/media/PR are more likely to agree strongly that B2B websites offer more engaging content and advertising and allow them to interact more efficiently (see notes for %)



Base: 751, all respondents – Q26/28 (Please indicate how strongly you agree or disagree with each of the following statements about your use of business websites for work purposes) (in brackets - use 5+ delivery mechanisms)

Role of B2B websites in PDM process

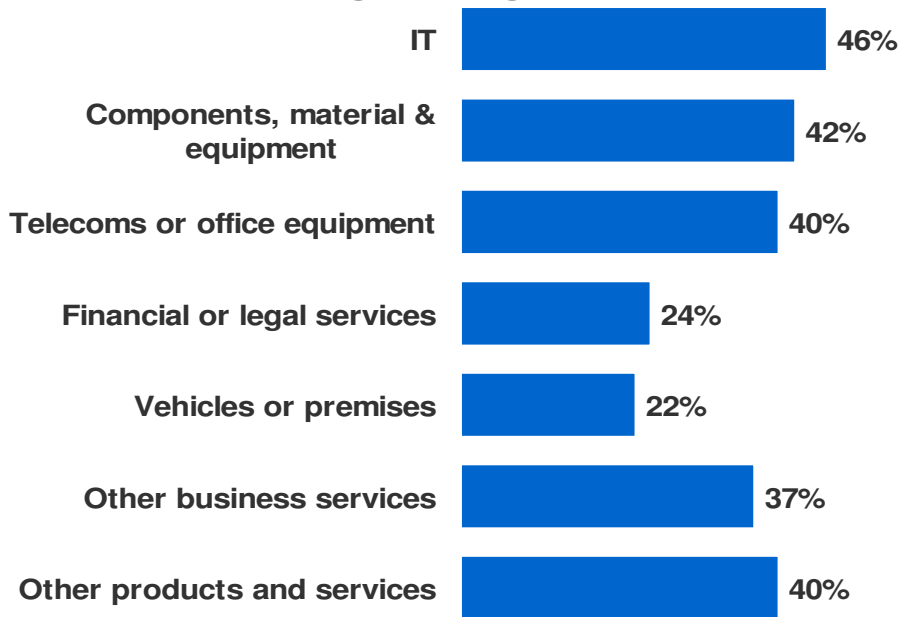
Key findings

- Most BDM have taken action as a result of visiting B2B websites –Q27 (slide 39)
- B2B websites are the most used source of info in PDM process – Q20 (slide 40)
 - Not only used at the initial research stage but throughout the PDM process
- Nearly half of BDM use advertising as a source of info in PDM process Q16 (slide 41)
- Trust, credibility and reliability are most important factors when choosing a source of information – Q19 (slide 44)
- B2B websites are seen as objective, trustworthy and relevant – agree with statements at Q26/Q28 (slide 45)
- BDM more likely to respond to advertising on B2B websites than in other media – agree with statements at Q26/Q28 (slide 45)

PDM responsibility

- Our sample of BDM is involved in making purchase decisions at all levels of the process and for all categories of products and services.

Purchase decision making categories (Q13)



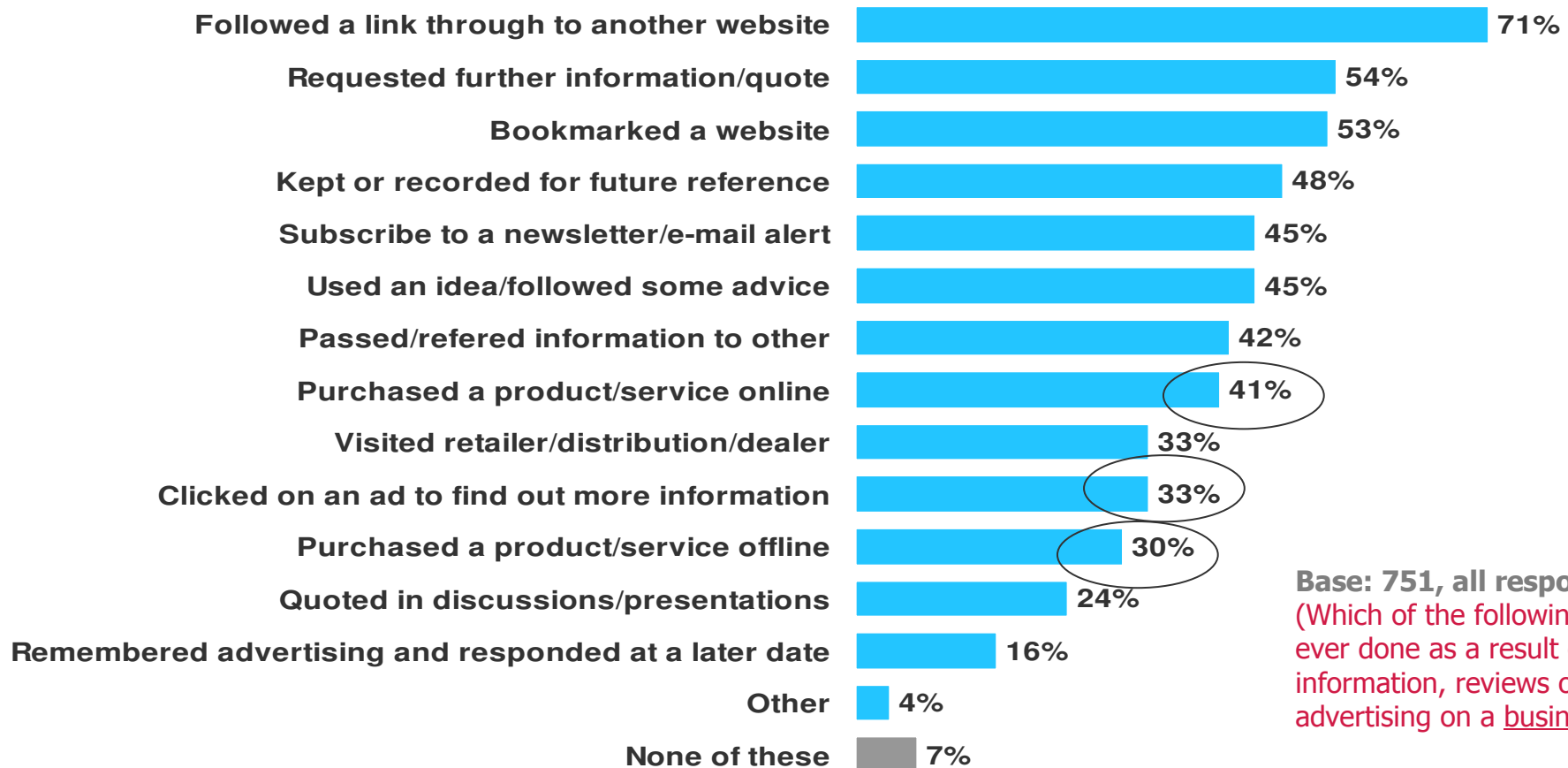
Level of involvement in decision making process (Q14)



Base: 751, all respondents – Q13 (In which of the following categories are you involved in making decisions about the purchase, lease or use of products and services?) / Q14 (In which of the following areas of the decision making process are you personally involved in?)

Actions taken as a result of using B2B sites

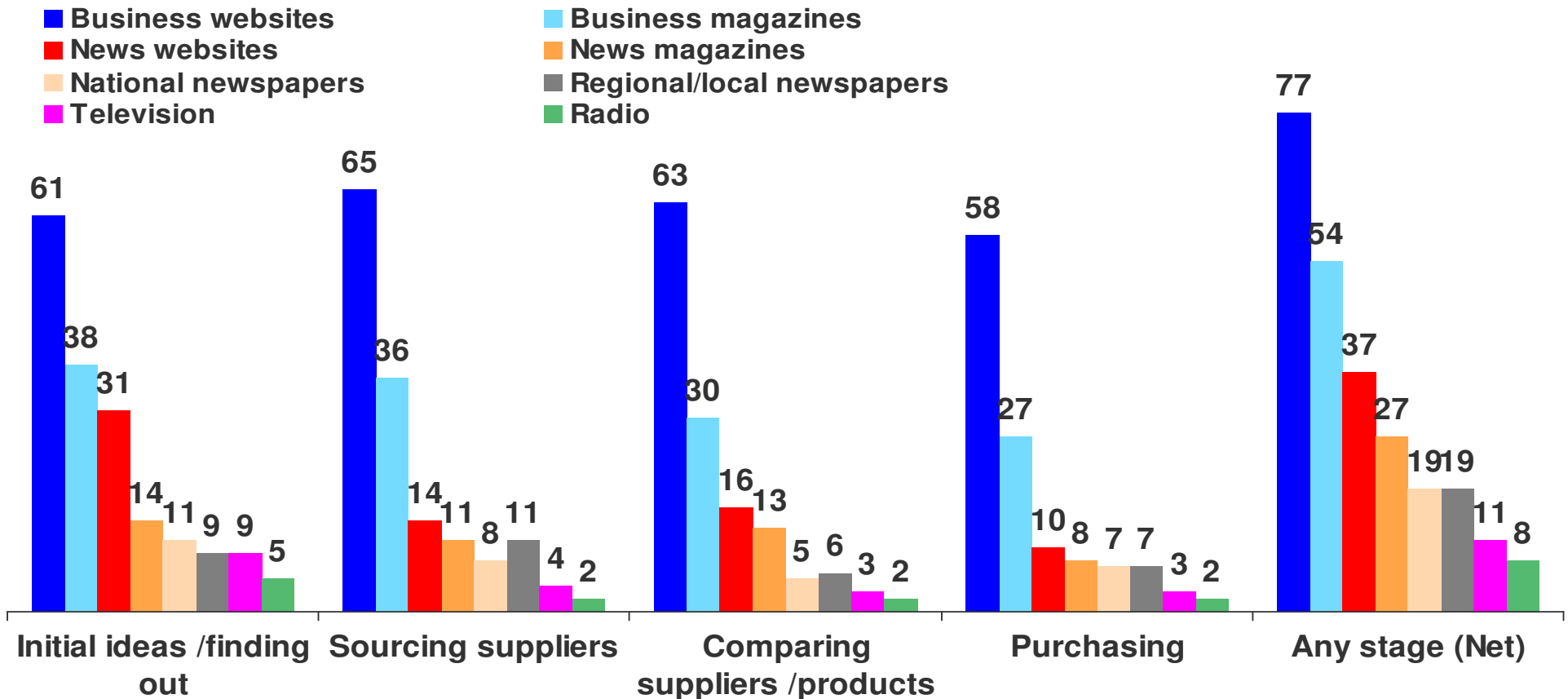
- Nearly all BDM (93%) have taken **any** action as a result of visiting a B2B site, providing an ideal environment for advertisers. Regular B2B websites users (**at least once a day at Q21**) and users of delivery mechanisms (**Use any at Q22**) are more likely to have taken action.



Base: 751, all respondents – Q27
 (Which of the following have you ever done as a result of reading information, reviews or seeing advertising on a business website?)

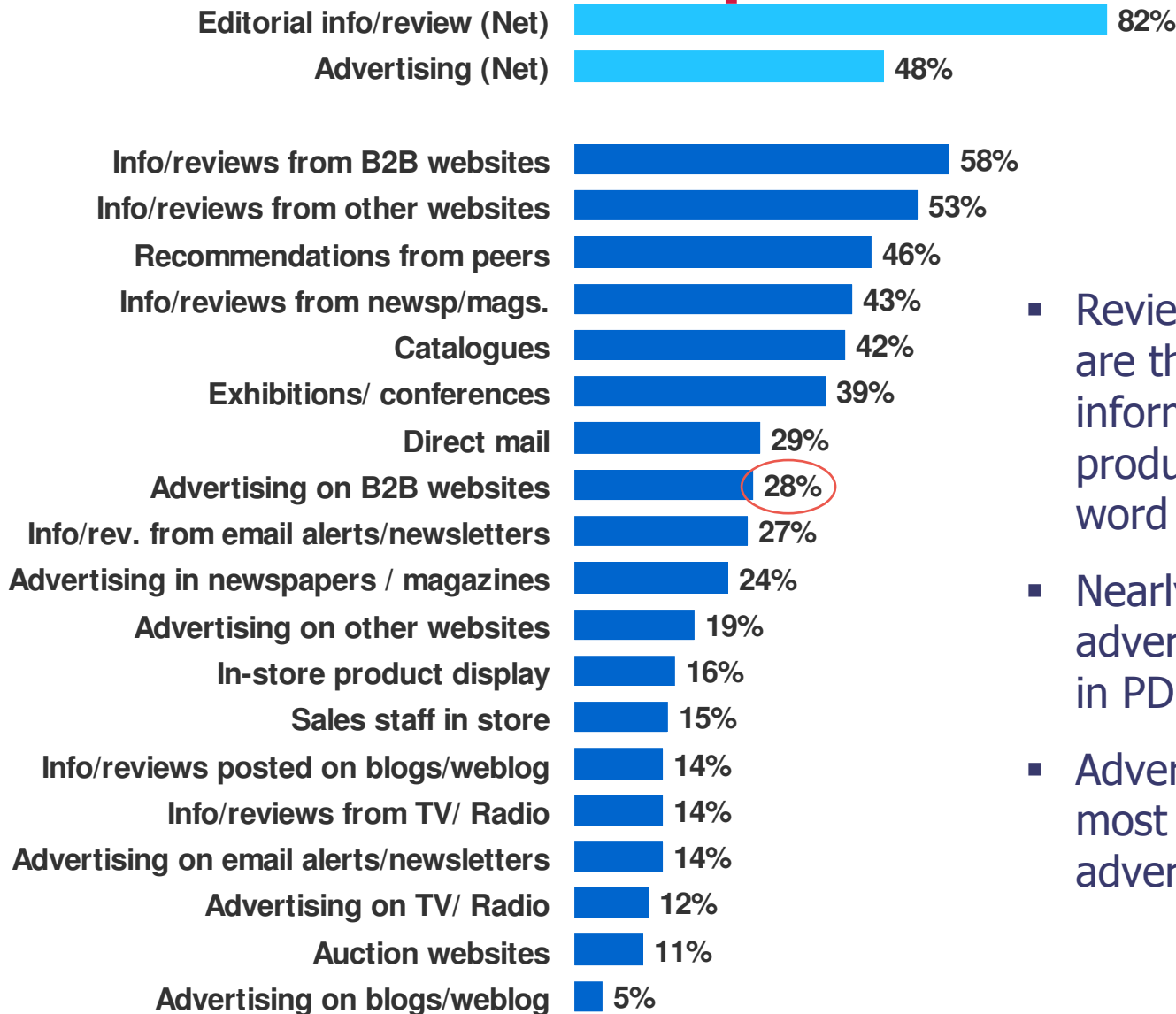
Media used in PDM process

- Nearly half (49%) claim to regularly buy products/services for their organisation online (see notes)
- B2B websites are the most used media sources at every stage of PDM process - well ahead other media, followed by B2B magazines



Base: 751, all respondents – Q20 (Which of the following media would you use at different stages of the decision-making process?)

Sources used in PDM process



- Reviews from B2B and other websites are the most popular sources of information to research or purchase products and services, following by word of mouth from peers
- Nearly half (48%) admit to use advertising as a source of information in PDM process (net)
- Advertising on B2B websites is the most used form of advertising over advertising in other media

Base: 751, all respondents – Q16 (Which of the following have you ever used as a source of information to research or purchase products or services, for your organisation?)

Preferred source in PDM process



- Editorial content on B2B websites is the **preferred source** of information in PDM process – mentioned by a third of all BDM.
 - This rises to 46% of regular B2B website users (at least once a day at Q21)

Base: 751, all respondents – Q18 (And which one of these would you consider to be your main source of information to research or purchase products or services for your organisation?)

Most useful source in PDM process

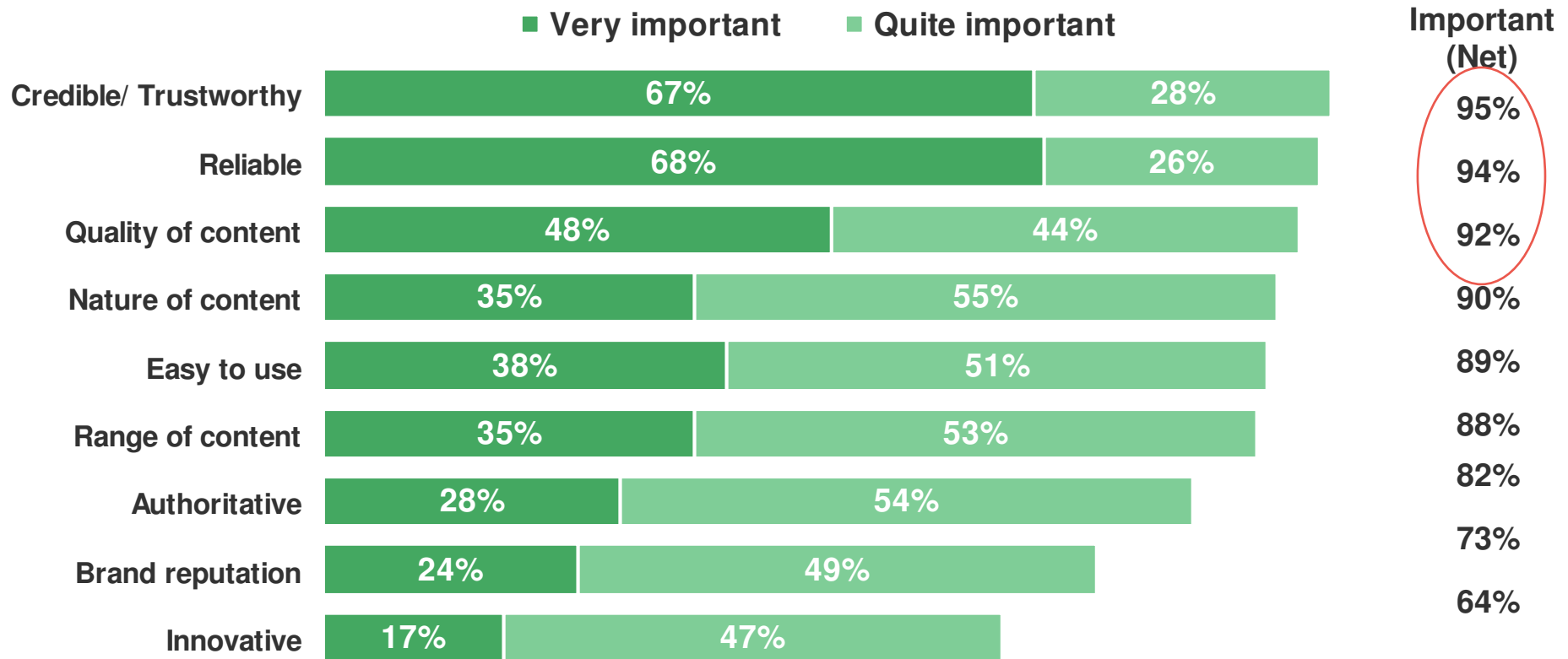


- After recommendations from peers, BDM find editorial content on B2B websites very useful when researching products/services for their organisation

Base: All who have ever used each source for PDM – Q17 (How useful do you find each of these sources of information to research or purchase products or services for your organisation?)

Drivers for using a source for PDM

- Trust, credibility and reliability are most important factors when choosing a source of info to research or purchase products and services



Base: 751, all respondents – Q19 (How important are each of the following factors to you when using a source to research or purchase products or services?)

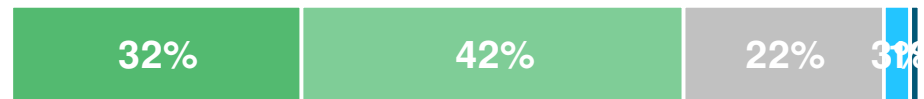
More likely to respond to ads on B2B sites

- The relationship with a B2B site is really important to provide a good environment for advertising
- Reputation, trust, objectivity and relevance are key (as shown below)
- BDM are more likely to respond to ads on B2B sites as more relevant than in other media (43% agree)

■ Agree strongly
 ■ Agree slightly
 ■ Neither agree or disagree
 ■ Disagree slightly
 ■ Disagree strongly

Agree (Net)

I trust a website more if it comes from a source that I know of already (e.g. business publication, industry body)



74%

Business websites provide objective feedback on products and services



55%

I'm more likely to have confidence in or do business with a company if I have seen it advertised on a business website that I know



53%

Advertising on business websites is more relevant to me and my work than on other websites or media



44%

I am more likely to respond to advertising on a business website than advertising in other media



43%

Base: 751, all respondents – Q26/28 (Please indicate how strongly you agree or disagree with each of the following statements about your use of business websites for work purposes)

Summary of findings

Very positive findings for B2B websites

- Highly valued and essential for work and business – slide 14
- B2B websites seen as complementing B2B magazines – slide 21
- Key benefits : interaction, time saving and convenience – slide 35
- B2B websites provide engaging content, tools and advertising – slide 35
- B2B websites encourage purchase behaviour – Q27 slide 39
- Need to encourage interaction and search function – we feel these are the key USPs of B2B websites over other media
- Need to use brand names as trust and known brands are important – Q19 slide 44 and statements slide 45
- A bright future for B2B websites

Thank you

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