



February 20, 2009

# The Social Technographics® Of Business Buyers

by Laura Ramos and G. Oliver Young

for Technology Product Management & Marketing Professionals

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## How Technology Buyers Engage With Social Media

This is the first document in the "B2B Social Media Strategy" series.

by **Laura Ramos and G. Oliver Young**

with Peter Burris, Josh Bernoff, Bradford J. Holmes, and Zachary Reiss-Davis

### EXECUTIVE SUMMARY

Social media give a voice to buyers who can now describe their experience and disappointment to a global audience. And, wow, are they saying a lot. Forrester surveyed more than 1,200 business technology buyers and found that they exceed all previous benchmarks for social participation. B2B marketers, eager to know how social media fits into the marketing mix, can use the Social Technographics® Profiles of business decision-makers to design marketing programs that not only capitalize on emerging social behaviors but also fundamentally change the nature of the marketing relationship between B2B buyers and sellers.

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### NOTES & RESOURCES

Forrester surveyed IT and business decision-makers in the North American And European B2B Social Technographics® Online Survey, Q4 2008.

#### **Related Research Documents**

["Tell Your B2B Marketing Story With Online Video"](#)  
January 26, 2009

["B2B Digital Marketing: A Deep Dive Into IT Security Decision-Makers"](#)  
January 23, 2009

["How To Avoid B2B Marketing Obsolescence"](#)  
January 15, 2009

["B2B Digital Marketing: A Deep Dive Into IT Hardware Decision-Makers"](#)  
January 6, 2009

["Making Social Media Work in B2B Marketing"](#)  
October 21, 2008

["The Growth Of Social Technology Adoption"](#)  
October 20, 2008

## B2B MARKETERS STRUGGLE TO SET SOCIAL STRATEGY

Marketers who sell highly considered products through a direct sales force and complex channels are jumping into social media. Large companies like HP, IBM, Microsoft, Oracle, and SAP pour time and money into blogging, viral video, and communities, expecting Web 2.0 tools to drive demand in 2009 as pipelines stall in the current recession.<sup>1</sup> Yet Forrester's research on Social Computing shows that marketers who initiate programs with social tactics and technology fail to attract buyers because:

- **Marketers don't know how business buyers use social technologies.** Business-to-business (B2B) marketers see that consumers read blogs, join social networks, and rate products and wonder "Do my customers behave the same?" By jumping directly into the technology, marketers devote time and effort on social media campaigns without knowing if anyone will show up to participate. A television production-quality video called "IBM's BladeCenter Viral Video" collected less than 1,300 views — and no comments or responses — between April 2008 and February 2009 on YouTube.<sup>2</sup> While IBM may have repurposed this content elsewhere, the cost per impression on this social channel was high and the results debatable.
- **Successful track records are rare and copying others doesn't work.** B2B marketers lack social media experience. They don't know which approaches work with different audiences or how to achieve discrete marketing goals like generating new leads through communities. Cisco launched the ASR 1000 on Second Life where a community of Cisco engineers and channel partners had set up shop. Did a fully digital product introduction translate into a faster sales ramp? With a long sales cycle and intermediate channel partners, Cisco found it tricky to tie social activity to quarterly results for this product.
- **Rapid technology changes leave no time to master current approaches.** Executive blogs, research communities, and customer-generated videos sound like a good idea until marketers actually have to implement them. Yet as soon as marketers figured out how to build blog readership, microblogs and wikis entered the scene, changing the dynamic once again. Without a focus on audience first, social media planning based on technology won't be flexible enough to incorporate emerging tactics into the marketing mix or to help marketers decide whether to double down or pass on new approaches.
- **Executives and legal departments see social activity as a risk to business brands.** The prospect of losing control over buyer communication makes executives squeamish about social media. They fear that customers will use the medium to voice complaints and criticisms. What happens to brand value when marketing can't spin away bad news or stifle the complaints of a small but vocal group of detractors? Legal, customer service, and executives step in to put social media controls and approval steps in place. As a product marketer for the server division of a large high-tech firm commented, "We have the talent and creativity to make communities work; there are just so many rules that we can't do anything social before getting 100 approvals."

## Understanding How Buyers Participate Is The First Step

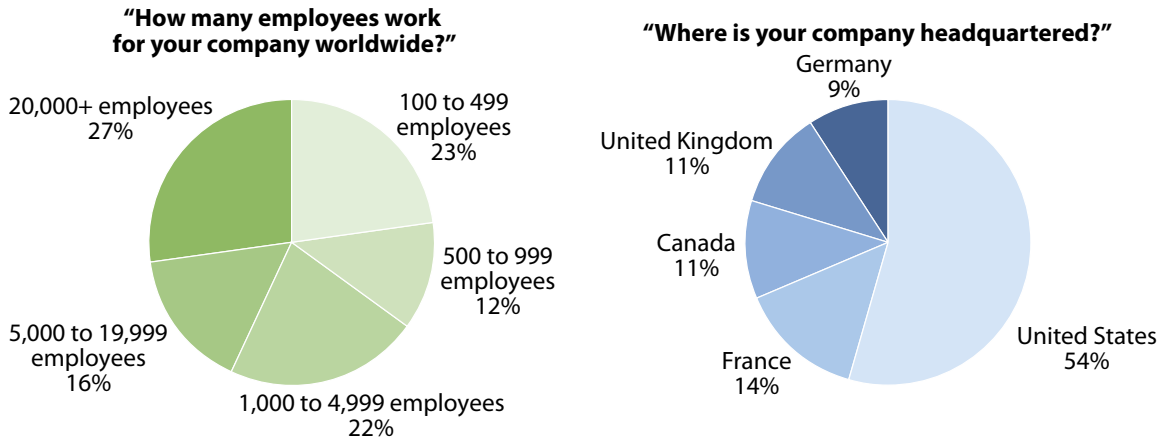
Like bright, shiny objects glistening in the sun, new social tools catch marketers' attention but cause them to look away from buyers' needs and business objectives. B2B marketers succeed when they first understand how buyers approach Social Computing and then design programs that map their business objectives to buyers' social proclivities. Improving the dialogue between buying communities and sellers who provide solutions creates better business outcomes — the goal of community marketing.<sup>3</sup>

Forrester's Social Technographics help marketers understand how consumers approach social technologies. To learn how business buyers stack up against this model, we surveyed more than 1,200 technology buyers from large and small firms across 17 major industries and from five countries to profile their online social behavior (see Figure 1). We found:

- **Business technology buyers participate socially more than adult US consumers.** We surveyed technical and line-of-business decision-makers who buy technology (see Figure 2). Socially, this is an extremely active group compared to US adults or many other groups we've seen: respondents over-index against consumers on all segments except Inactives (see Figure 3). Almost all (91%) read blogs, view videos, or listen to podcasts online, and just 5% report that they don't participate in any social activity at least monthly. There are also more Joiners in this group than any other population Forrester has reviewed. Mostly males in their mid-to-late 30s, working for more than five years in their current IT positions, and influencing north of \$100,000 in purchases — these respondents are an attractive demographic for most technology and business service providers (see Figure 4).
- **Social activity carries over into the workplace.** To determine if this exuberant social activity trickles into the working world, we asked respondents whether they engage in selected social activities primarily for personal or for business purposes. In general, social participation decreases while working but participation profiles appear similar to recent adult US consumer results, meaning that B2B technology buyers are keeping pace with consumer peers (see Figure 5). We thought IT buyers would outdistance their non-technical counterparts across behavior profiles, but found instead that business decision-makers are just a step behind the IT folks.
- **Subtle differences separate technology category buyers.** Looking at products purchase history, we found that IT services buyers are less socially active than other technology categories (see Figure 6). Consistent with our prior research, IT service buyers are more relationship-driven, influenced most by face-to-face interaction — not by Web or online activity.<sup>4</sup> In contrast, more hardware buyers rise to the highest rung on our social participation ladder and fewer telecom/networking buyers sit on the social sidelines. Veterans of technical forums and user groups, these buyers participate in social activity as it moves into the online world.

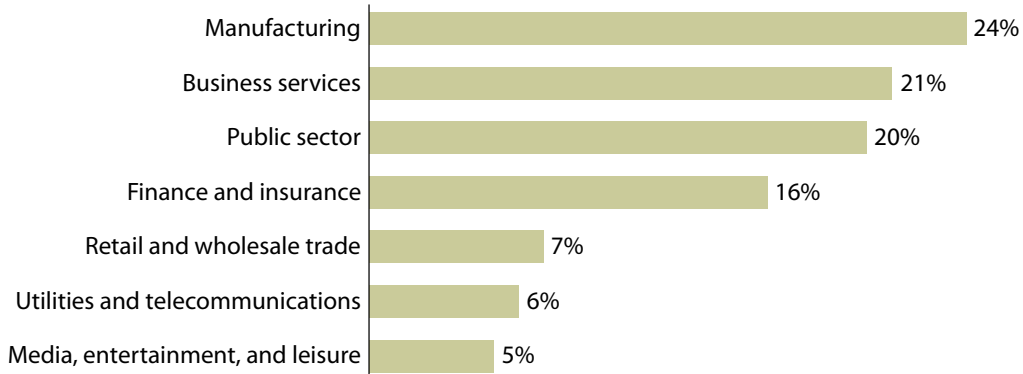
**Figure 1** Respondents Hail From Different Regions, Industries, And Firm Sizes

**1-1 Firm size and geography**



**1-2 Industry**

**Which of the following best describes your firm’s industry?**



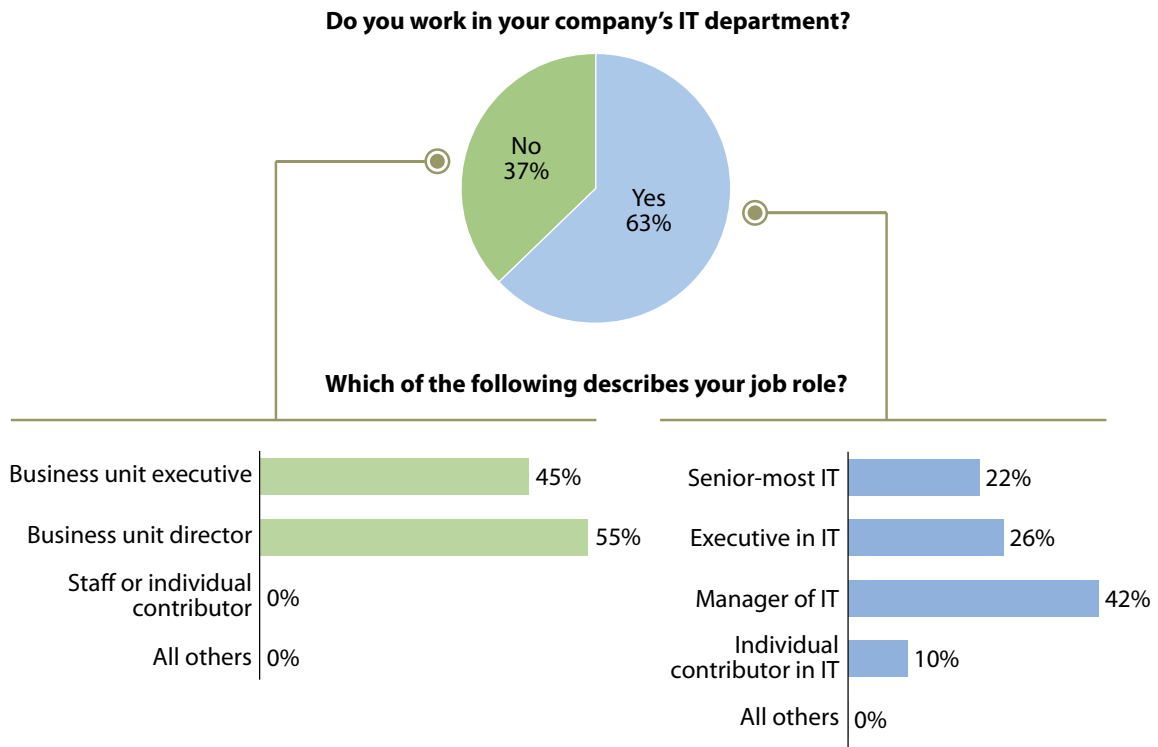
Base: 1,217 North American and European technology decision-makers at firms with 100 or more employees

Source: North American And European B2B Social Technographics® Online Survey, Q4 2008

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Source: Forrester Research, Inc.

**Figure 2** Results Include Both IT And Business Roles



Base: 447 North American and European line-of-business technology decision-makers at firms with 100 or more employees

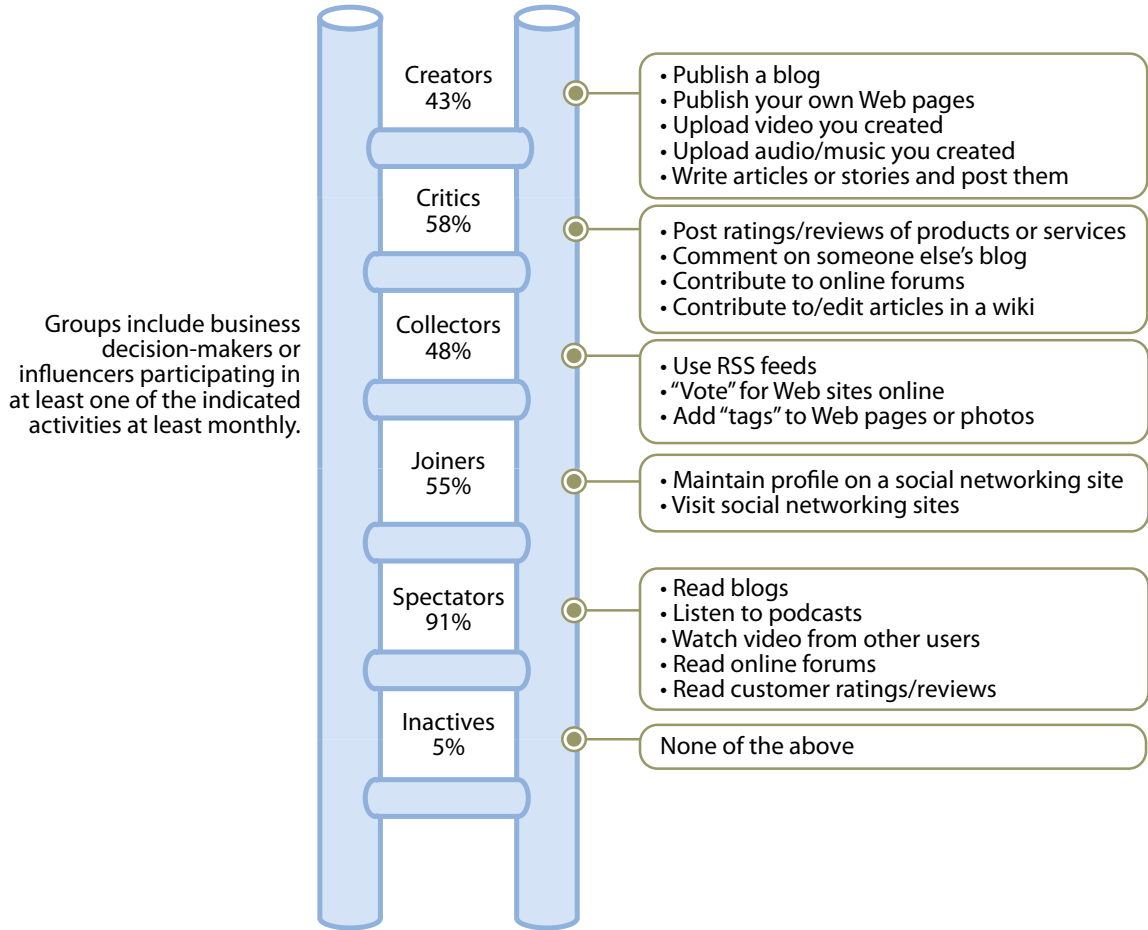
Base: 770 North American and European IT technology decision-makers at firms with 100 or more employees

Source: North American And European B2B Social Technographics® Online Survey, Q4 2008

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Source: Forrester Research, Inc.

**Figure 3** Social Technographics® Groups B2B Buyers By Social Activity Participation



**Figure 4** Respondent Demographics Mirror Typical IT Buyer Profiles

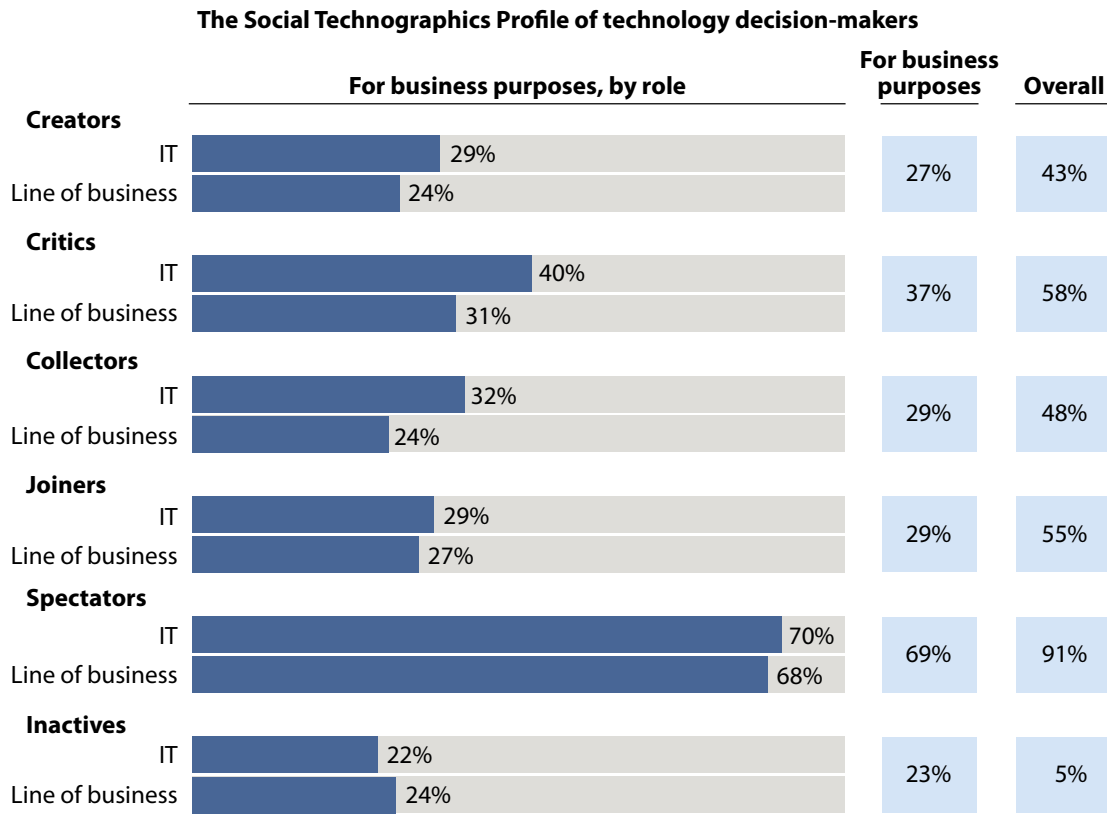
	<b>Overall Social Technographics Profiles</b>					
	<b>Creators</b>	<b>Critics</b>	<b>Collectors</b>	<b>Joiners</b>	<b>Spectators</b>	<b>Inactives</b>
<b>What is your gender?</b>						
Female	17%	16%	14%	17%	17%	19%
Male	83%	84%	86%	83%	83%	81%
<b>How long have you been in your current position?</b>						
Less than one year	5%	6%	7%	7%	6%	3%
One to less than two years	11%	12%	13%	13%	12%	11%
Two to less than five years	35%	32%	35%	35%	32%	19%
Five or more years	49%	50%	46%	44%	51%	66%
<b>What is your age?*</b>						
26 to 30	7%	6%	7%	7%	5%	0%
31 to 35	19%	17%	19%	18%	14%	5%
36 to 40	22%	19%	20%	23%	19%	16%
41 to 45	19%	19%	19%	19%	20%	10%
46 to 50	17%	18%	17%	17%	18%	24%
51 or older	17%	20%	17%	16%	23%	45%
<b>In the past 12 months, how much was spent on the largest IT purchase you were involved in? (In US dollars)</b>						
Less than \$10,000	10%	8%	9%	9%	9%	6%
\$50,000 to \$99,999	28%	27%	28%	26%	28%	27%
\$100,000 to \$499,999	29%	30%	30%	30%	29%	39%
\$500,000 to \$999,999	14%	12%	12%	12%	12%	10%
\$1 million or more	19%	21%	19%	21%	20%	16%
	N= 524	N=700	N=584	N=672	N=1,107	N=62

Base: 1,217 North American and European technology decision-makers at firms with 100 or more employees

Source: North American And European B2B Social Technographics® Online Survey, Q4 2008

\*Less than 1% of respondents were under 26 years old.

**Figure 5** B2B Buyer Social Participation Decreases On The Job



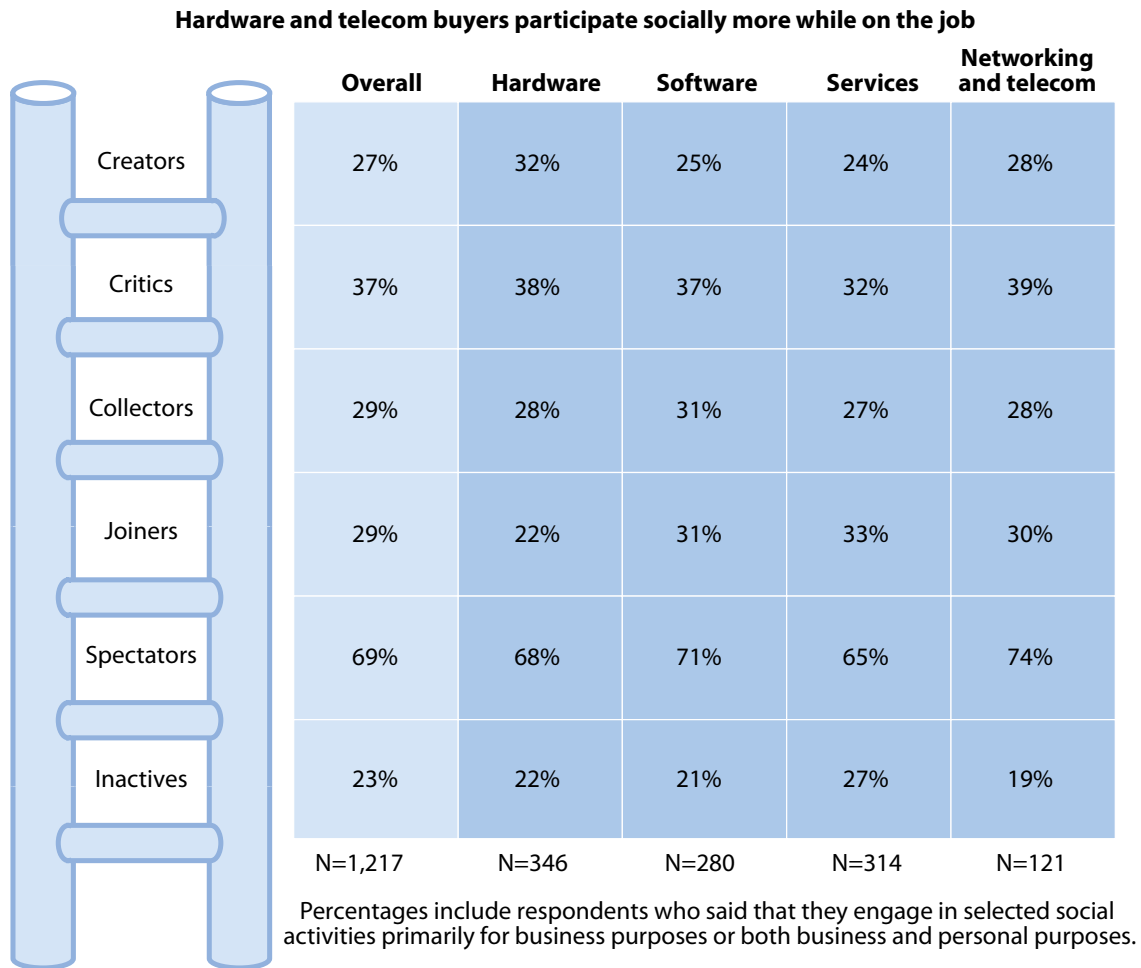
Base: 1,217 North American and European technology decision-makers at firms with 100 or more employees

Source: North American And European B2B Social Technographics® Online Survey, Q4 2008

47144

Source: Forrester Research, Inc.

**Figure 6** Social Participation Varies By Product Category Purchased



Base: 1,217 North American and European technology decision-makers at firms with 100 or more employees

Source: North American And European B2B Social Technographics® Online Survey, Q4 2008

47144


Source: Forrester Research, Inc.

## PROFILING SOCIAL BEHAVIOR HELPS FINE-TUNE MARKETING STRATEGY

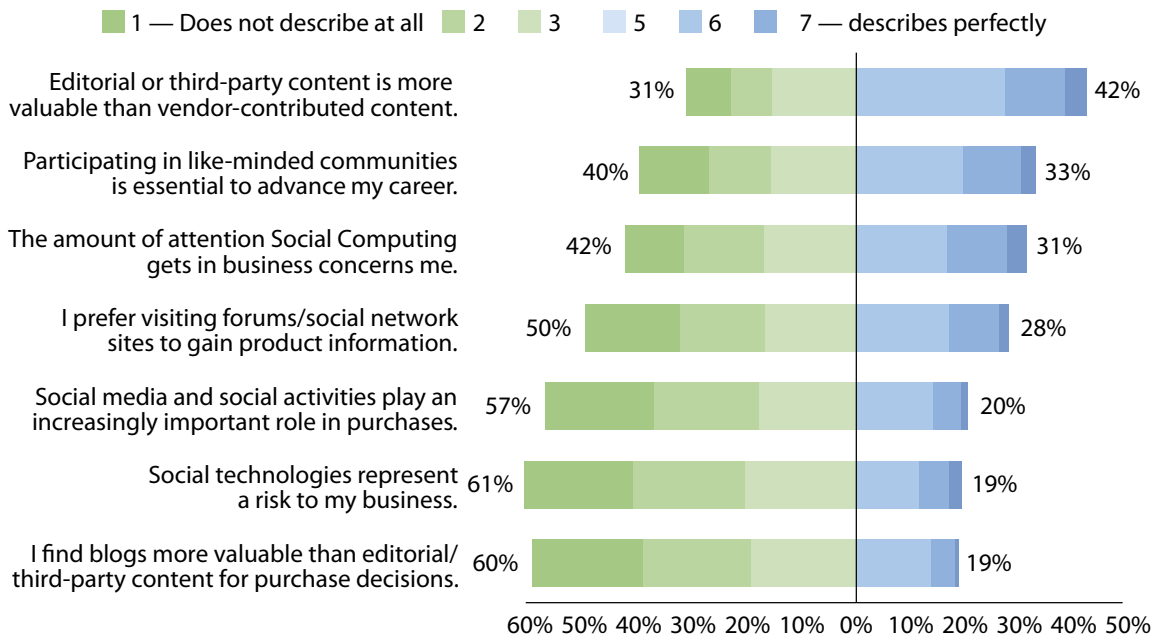
Learning how B2B buyers engage socially only solves one part of the marketing strategy puzzle. Marketers must also determine how social tactics complement the rest of the marketing mix. What's more, engaging customers socially must support business objectives like increasing brand awareness, demonstrating thought leadership, generating demand, and encouraging self-service. Balancing these tradeoffs is not straightforward because:

- **Buyers' attitudes about social activity don't match purchase decision-making.** Tech buyers view social media very favorably: 61% say social technologies don't represent a risk to their business — a rate three times higher than the 19% who feel some risk is present (see Figure 7). Similarly, 42% say they are less concerned about the amount of attention being paid to social activity today than the 31% who say they are. However, reconciling these attitudes with purchase behavior is complicated when 57% of respondents feel social media doesn't play an important role in purchasing, and 60% don't find blogs more valuable than editorial content for informing purchase decisions. These differences show that business buying is complex and that, while popular, social activity has yet to become a standard part of the buying process.
- **Social participation does not yet translate into purchase influence today.** More than three-fourths of respondents say that peers influence their purchase decisions, more so than any other media or information source (see Figure 8). While this shows B2B buying is fertile ground for emerging community sites, social networks, and user-contributed content, business buyers don't yet find these sources of information as important as traditional ones. Buyers put industry publications, Web sites, and vendor salespeople ahead of all social activities as they scope business needs, craft requirements, and select vendors.<sup>5</sup>
- **But social media importance will increase during the next 12 months.** Looking ahead to social media use in 2009, buyers believe forums, virtual trade shows, and rating/review sites will figure more prominently in their decision-making (see Figure 9). Why? Among social media options, these most closely resemble the corporeal venues — user conferences, exhibitions, and buyer guides — that B2B buyers have relied upon for years. Social media helps open participation to more people, and many don't have to be physically present to be involved.

**Figure 7** Buyers' Social Attitudes And Behavior Have Yet To Align

 A spreadsheet with additional data is available online.

**“How well do the following statements describe your work experience with social activities and technologies?”**



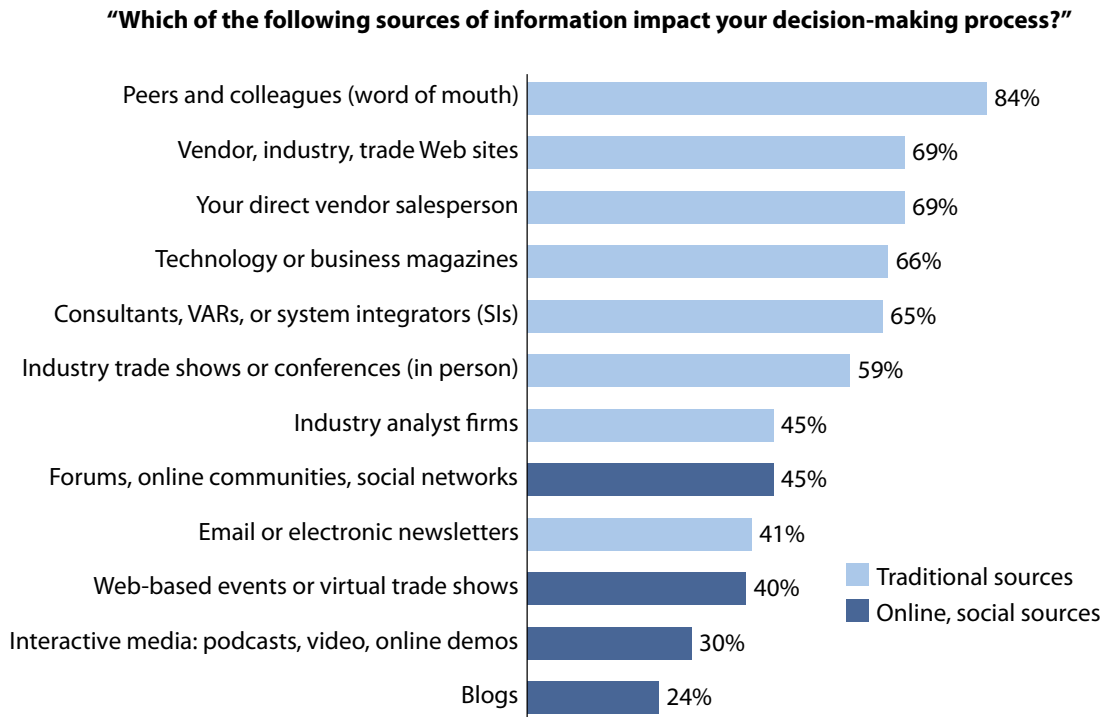
Base: 1,217 North American and European technology decision-makers at firms with 100 or more employees

Source: North American And European B2B Social Technographics® Online Survey, Q4 2008

47144

Source: Forrester Research, Inc.

**Figure 8** Peers Impact Purchase Decision-Making The Most



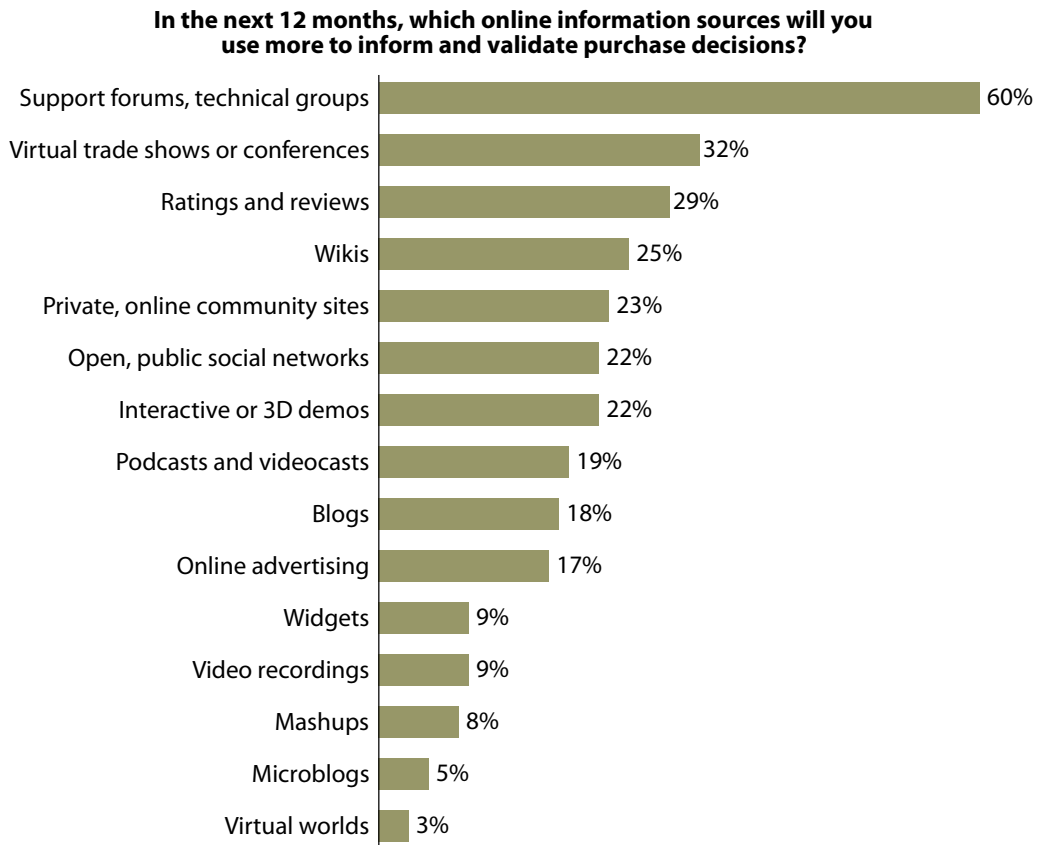
Base: 1,217 North American and European technology decision-makers at firms with 100 or more employees

Source: North American And European B2B Social Technographics® Online Survey, Q4 2008

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Source: Forrester Research, Inc.

**Figure 9** Looking Forward, Buyers Depend On Forums But Eye Virtual Trade Shows



Base: 1,217 North American and European technology decision-makers at firms with 100 or more employees  
Source: North American And European B2B Social Technographics® Online Survey, Q4 2008

47144

Source: Forrester Research, Inc.

## RECOMMENDATIONS

### USE BUYERS' PARTICIPATION TO SET SOCIAL STRATEGY NOW

Understanding buyers' propensity to engage in social activity helps marketers select and execute Web 2.0 tactics that encourage participation and support business goals. Firms that use this approach to step up social media investment during the recession will capture the attention of engaged technology buyers and come out ahead of competitors when the recovery starts. With this data, B2B marketers can use Social Technographics Profiles to model IT and non-IT participation and to:

- **Fill in buyer — and buying process — knowledge gaps.** Marketers can't establish objectives, set strategy, and pick tactics without understanding how audiences buy and whether social activity is important in the process. Forrester's data is best suited for marketers

who offer technology and IT services. Firms that sell healthcare insurance, industrial products or non-IT services will likely need to conduct primary research to understand how prospect behavior differs from this sample. Furthermore, Social Technographics reveals social adoption patterns but doesn't capture the dynamics between influencers and stakeholders. To fill in these gaps, marketers should sit with sales, support, and research counterparts to understand how target customers buy and to develop social media objectives that align with — and accelerate — buyer activity through the purchase process.<sup>6</sup>

- **Model how audiences participate socially throughout buying cycles.** Buyer social activity changes as the purchase process progresses. By modeling behavior, marketers can design engagement opportunities — content downloads, phone scripts, online events, votes/polls, etc. — that adjust to individual buyer movement up and down the Social Technographics ladder. Encourage Spectators to become Collectors by making it easy to share content or demos with other buyers. Help Critics turn into Creators by asking for their suggestions for improvements when they point out a shortcoming in a forum or blog comment.
- **Integrate social media into the marketing mix.** Social media activities that stand apart from mainstream marketing programs will look like separate, outbound channels. Marketers who take this approach will fail. Instead, incorporate social behavior profiles into buyer personas and help direct marketers, Web designers, and brand managers think holistically about social media's role in message design and offer execution.<sup>7</sup> Terms like Joiner and Collector provide a shorthand way to differentiate buyer segments and create a lingua franca that help keep marketers in different divisions and geographies outwardly focused on customer needs instead of inwardly focused on products, launches, and campaign results.
- **Prepare your organization to participate and accept criticism.** Encouraging social community participation is an inexact, unclear process so expect mistakes and painful lessons along the way. Negative comments will flow, so marketers must prepare sales, development, and support to accept them and to respond appropriately. Marketing should also create processes — like setting reasonable blog or community expectations about what you will allow and prohibit — that balances open communication with profitable business goals.<sup>8</sup> Understanding audience social specifics, and how they engage them as they buy, will help marketers craft mission statements and guidelines for blogs, wikis, and communities that make the rules of engagement clear and unequivocal.

## WHAT IT MEANS

### IN B2B: SOCIAL PARTICIPATION MODELS MORPH INTO GROUP PROFILES

Business buyers evaluate, select, and implement business solutions as teams, not as individuals. While Social Technographics helps to understand an individual's propensity to engage socially, marketers will need to augment these primary behavior models using data and techniques that take the complexity of business social relationships into account since:

- **B2B buyer participation runs in fits and starts.** The novelty associated with social media may continue to drive B2B participation rates higher near-term. Looking out further, however, Forrester sees business buyer participation settling into a pattern of more periodic — or episodic — behavior. Some participants will favor research- and information-seeking behavior, while others will contribute ideas or expertise. In either case, buyers will participate socially when they need to solve problems or evaluate progress; otherwise they are off running their companies. Marketers will need to evolve their definition of the customer to account for this on-again, off-again social behavior among key decision-makers and influencers.
- **B2B social models evolve to favor role, not individual, buyer behavior.** Complex purchase decisions involving both business and IT stakeholders will drive communities and social activity into specialized ecosystems. In these über-communities, social behavior models will apply more to the specific roles — vendor, partner, consultant, buyer, and so on — that individuals play during procurement rather than their individual participation activity.<sup>9</sup> Creating social strategy defined by group attitudes, motivations, and social participation tendencies, B2B marketers can produce more targeted messages and even tune product features and packaging according to community-defined needs and vetted solutions.
- **Quality content, regardless of source, drives community participation.** Firms like Citrix Systems, MetricStream, and National Instruments find that the key to creating communities is to focus on technical content developed by the sponsoring firm, the community, and ecosystem partners. Top marketers will integrate product messages and offers subtly into this exchange of information by not beating the feature and function drum, but by offering detailed explanations of how to solve a business problem and how, coincidentally, their product is part of the solution.

## SUPPLEMENTAL MATERIAL

### Methodology

Forrester's North American And European B2B Social Technographics® Online Survey, Q4 2008, was fielded to 1,217 IT executives and technology decision-makers located in the United States, Canada, the United Kingdom, France, and Germany from SMB and enterprise companies with more than 100 employees.

Of these, 797 were from North American companies and 420 were from European companies. Out of all respondents, 278 were from companies with 100 to 500 employees, 149 were from companies with 500 to 999 employees, 265 were from companies with 1,000 to 4,999 employees, and 325 were from companies with more than 20,000 employees. 770 respondents worked in their company's IT department. Of these, 168 were the senior-most IT decision-maker in the company, 197 were an executive in IT, 326 were a manager of IT reporting to an executive in IT, and 79 were individual contributors in IT. The remaining 447 respondents worked in other lines of business

with technology decision-making authority. Of those, 203 were executives, VP level or higher, and 244 were directors or managers. All respondents were screened for significant involvement in technology purchasing decisions.

eRewards fielded this survey online on behalf of Forrester during December 2008. Survey respondents were offered a small monetary incentive for participation. We have provided exact sample sizes in this report on a question-by-question basis.

For quality control, we carefully screen respondents according to job title and function. We ensured that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of IT products and services. Additionally, quotas are set for company size (number of employees) and industry as a means of controlling the data distribution and establishing alignment with IT spend calculated by Forrester analysts.

In addition to sampling error, one should bear in mind that the practical difficulties in conducting surveys can introduce error or bias into the finding of opinion polls. Other possible sources of error in polls are probably more serious than theoretical calculations of sampling error. These other potential sources of error include question wording, question ordering, and nonresponse. As with all survey research, it is impossible to quantify the errors that may result from these factors without an experimental control group, so we strongly caution against using the words “margin of error” in reporting any survey data.

These statements conform to the principles of disclosure of the National Council on Public Polls.

We have illustrated only a portion of survey results in this document. For access to the full data results, please contact your Forrester sales representative.

## ENDNOTES

<sup>1</sup> Examples of forays into social media by large firms are not hard to find. Microsoft Channel 9 hosts hundreds of talk show format videos on its Web site (<http://channel9.msdn.com/Search/?Term=microsoft%20channel%209%20videos>). IBM hosts more than 100 corporate blogs at its Web site (<http://www.ibm.com/blogs/zz/en/>) and hosts a virtual IBM Business Center on Second Life (<http://www.ibm.com/3dworlds/businesscenter/us/en/>).

<sup>2</sup> We viewed this video on February 3, 2009. At an estimated production cost of between \$50,000 and \$100,000 the average cost per impression ranges between \$40 and \$80 each — an expensive price tag compared to other channels. The lack of ratings, comments, and responses shows that the video failed to achieve viral status when compared to Greg the Architect, for example. You can see it in its entirety and review the statistics on YouTube. Source: YouTube (<http://www.youtube.com/watch?v=cT6teOr7ML4>).

- <sup>3</sup> Traditionally, B2B marketing in the tech industry focuses on helping salespeople match company offerings to identified buyers sequentially along a straight and narrow one-way street. Yet, the social graph in technology adoption processes is more complex and touches more decision-makers, business objectives, and personal motivations than this process would imply. Therefore, a new model called community marketing is required, based on listening to customer needs and exploring solutions together. See the May 7, 2008, "[Community Marketing: A New Discipline For Business Technology Marketers](#)" report.
- <sup>4</sup> Personal relationships sway IT services purchase decisions the most. Of the top six sources that IT service decision-makers said most influence their purchase decisions, five are personal relationship or face-to-face interactions. See the November 19, 2008, "[B2B Digital Marketing: A Deep Dive Into IT Services Decision-Makers](#)" report.
- <sup>5</sup> This is consistent with our Business Data Services research on B2B buyers' sources of information and influence. See the October 9, 2008, "[B2B Digital Marketing: A Deep Dive Into Network And Telecommunications Decision-Makers](#)" report; see the January 6, 2009, "[B2B Digital Marketing: A Deep Dive Into IT Hardware Decision-Makers](#)" report; and see the January 23, 2009, "[B2B Digital Marketing: A Deep Dive Into IT Security Decision-Makers](#)" report.
- <sup>6</sup> Accounting for the impact of social media on the business means understanding intimately how business decision-makers purchase products and services. This is typically a complex course of action involving many parties in B2B sales, but is essential and results in a map of the buyer's journey. See the September 26, 2007, "[Best Practices: B2B Marketing Measurement](#)" report.
- <sup>7</sup> Companies that develop and use personas report benefits that include a better understanding of customers, shorter design cycles, and improved product quality. This is because personas represent "the user" as a real human with a name, face, motivations, and goals. Understanding the social behavior profiles of customers contributes new color and insight to persona development. See the September 23, 2004, "[Persona Best Practices: Developing Your Customer Research Plan](#)" report.
- <sup>8</sup> Social media participation and contribution policies support marketing and business objectives, build user trust, and prevent disastrous moderation decisions made in the heat of the moment. Successful guidelines also limit destructive behavior while supporting a wide range of employee and user contributions. See the August 11, 2008, "[Crafting A Content Moderation Policy](#)" report.
- <sup>9</sup> B2B firms are targeting the needs of roles or jobs within the enterprise, and B2B marketers find that crafting messages for specific roles, rather than to the company overall, gets the attention of key buyers and stakeholders and ultimately drives leads and business growth. See the July 2, 2008, "[A Guide To Building Role Profiles](#)" report.

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Making Leaders Successful Every Day

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