BUYERsphere™

REPORT 2011

The annual survey of changing B2B buyer behaviour

BASE ONE

B2B Marketing

IN ASSOCIATION WITH:

McCallum Layton

Toluna

ABOUT THIS **REPORT**

The Buyersphere is not a small piece of research. This is not, therefore, a small document. Print it out, and several small trees will pay the price for your curiosity.

But our thoroughness in researching buyer behaviour should give you confidence that these are concrete, reliable findings. They can be used to convince your clients, persuade your bosses, defend your decisions, or simply to give you inspiration. Either way, we hope they are useful, and that you will understand the need for the rather lengthy but necessary description of the survey participants and of the methodologies we used.

Get through that and it's pure research gold.

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THE **BUYERSWHAT?**

Social media, economic uncertainty and an increased appetite for information has a huge effect on buyer behaviour. The Buyersphere is the new world of business to business buying and the behaviours within it. We commissioned this report into the buying mindsets, decisions and processes of buyers across all sectors and in the different economies of Europe, giving us a unique report and invaluable resource for all B2B marketers.

Base One have commissioned a research study to explore the extent to which B2B decision-makers are using social media tools and channels to help them in the process of refining their needs and identifying suitable suppliers for major business purchases. The survey was conducted online, administered and analysed by market research specialists McCallum Layton, among business respondents provided by online panel provider Toluna. This was the second time that this survey had been carried out, with the first wave conducted in December 2009.

In order to qualify, respondents had to have been personally involved in the decision-making process for any type of purchase over £20,000 that had been completed on behalf of their business in the last 12 months. Questions focused on this particular purchase, in order to ensure the findings are specific to actual experiences and decisions.

The survey was carried out in March 2011. A total of 1017 decision-makers took part. Unlike the original wave of research, which was conducted in the UK only, the 2011 project included interviews in France (151), Germany (163), Italy (100) and Belgium (102) as well as the UK (501).

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WHO TAKES A SURVEY **LIKE THIS?**

From small companies to massive multinationals, from manufacturing and retail to education and agriculture, we surveyed people of all ages, at all levels, across five different economies in Europe to get the most reflective and robust findings possible. And because we surveyed not just what people thought, but also what they actually did, the discoveries aren't just interesting, some of the findings are game-changing...

Before looking at the results in detail, it is necessary to consider the profile of those answering the survey, as this provides important context when considering the implications of the findings.

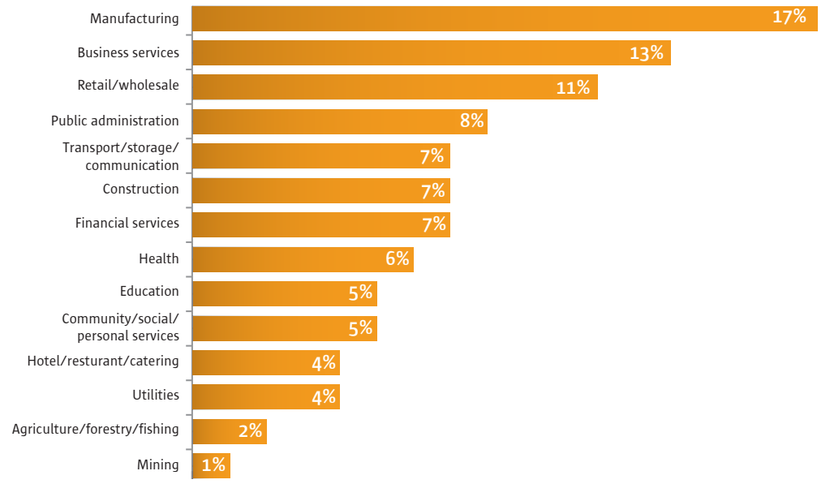
No single sector accounted for more than 17% of respondents at the overall level. There were some differences by country: manufacturing organisations were most strongly represented in France, and least in Italy, where the response from retail / wholesale companies was above average. Belgian respondents were over twice more likely than the European average to be working in public administration

A good mix of company sizes were represented in this survey. Almost a third of respondents came from smaller companies with up to 100 employees, whilst at the other end of the scale, almost a quarter of those taking part worked in companies employing over 1000 people.

Three in ten responses came from those in IT, whilst finance and HR roles made up another 18% and 12% respectively. No other job role was given by more than 4% of respondents, illustrating the variety of decision makers participating in the project.

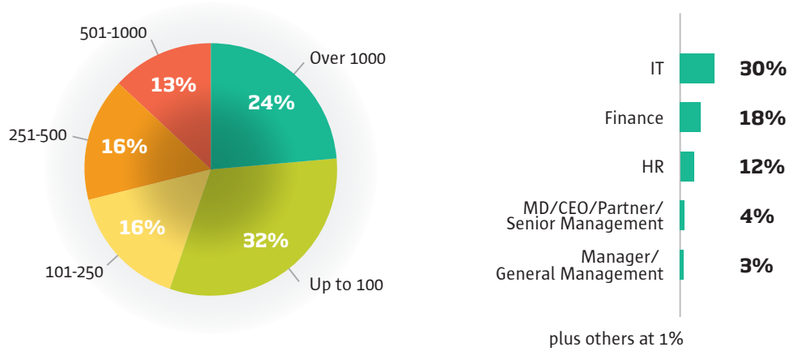
A broad spectrum of age groups was represented, as illustrated above. Both those aged over 50 (22%) and those under 30 (14%) were represented. Almost two thirds fell into the 31-50 age group. Almost half had been in their current role for over 6 years. Only 5% were new to their role, having been in the position for under 12 months, whilst a further 23% had been in their role for 2-3 years.

MAIN BUSINESS ACTIVITY OF RESPONDENTS' COMPANIES



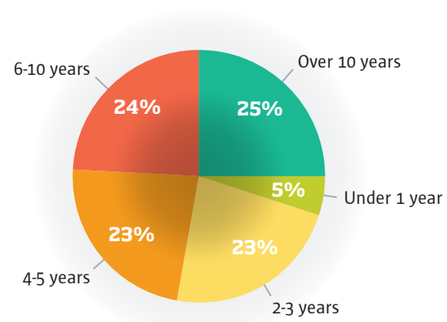
Base: all respondents (1,017)

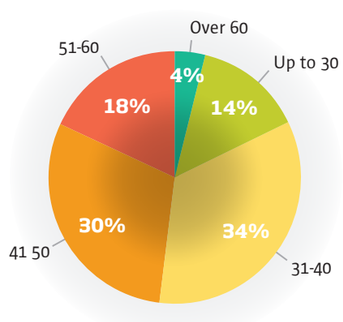
NUMBER OF EMPLOYEES IN COMPANY AND JOB ROLE



The profile of the Italian companies responding was smaller than average (51% had up to 100 employees). Belgian organisations were larger than average. (34% employing over 1,000 people).

LENGTH OF TIME IN CURRENT ROLE AND RESPONDENT AGE



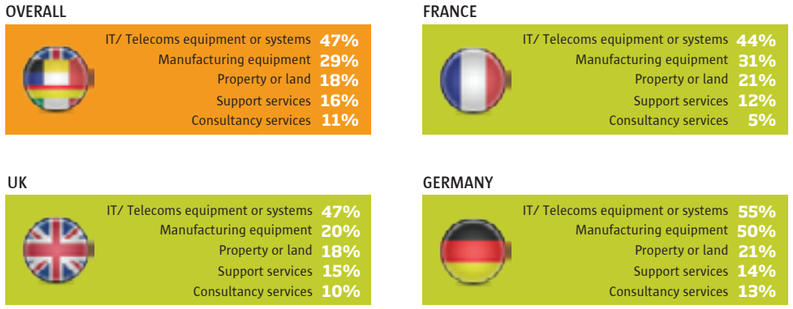


WHO **BOUGHT WHAT?**

The purchase recently made was most frequently IT or telecoms equipment, which is unsurprising, given that almost a third of respondents worked in an IT related role. The main purchase categories are illustrated in the graphic.

Purchase category

NUMBER OF EMPLOYEES IN COMPANY AND JOB ROLE



Whilst IT and manufacturing equipment were the most common types of purchase made recently across all countries, the Italian results also showed a more considerable number of purchases of consultancy services, property/land and support services than elsewhere in Europe. As respondents were asked about their most recent purchase only, this could suggest that Italian respondents were amongst the most likely to have bought a combination of different products/services within their last transaction.

Purchase details

For 38% of respondents, the purchase made was something completely new to their business. For 47% it was something that was the same or similar to something that had been purchased in the past, with 15% claiming both descriptions were true. Italian respondents were most likely to feel their purchase fit into both categories (32%), backing up the theory that they were most likely to be buying combined services/products.

Those in organisations with 1,000 or fewer employees were more likely to be purchasing something new (41%) compared to their counterparts in larger companies (30%).

Over half of purchases were for under £/€ 30,000 (56%), whilst 17% were for over £/€ 100,000. Unsurprisingly, those in companies with over 1,000 employees spent more on average.

WHEN WERE **SUPPLIERS INVOLVED?**

INVOLVEMENT IN THE PURCHASE PROCESS

STAGE IN THE PROCESS	PROPORTION OF RESPONDENTS CONTACTING SUPPLIERS
While looking to understand or define need	51%
In process of identifying potential suppliers	61%
In making final supplier selection	44%

Base: all respondents (1,017)

Even though the purchases being evaluated were relatively large, at least four in ten respondents reported that they were solely responsible for each stage of the purchase process.

Respondents were asked whether they had made contact with potential suppliers at each stage of the procurement process. In order to ensure the question was being answered consistently, a definition of 'contact' was displayed when this question was asked:

"By 'direct contact' we mean any contact that could have resulted in the suppliers providing a response. So telephone calls or filling in enquiry forms via websites would count, but passively looking at a supplier website would not."

Contact with potential suppliers was slightly more common during the shortlisting stage than before or after, although results did indicate a considerable amount of interaction occurring throughout the process.

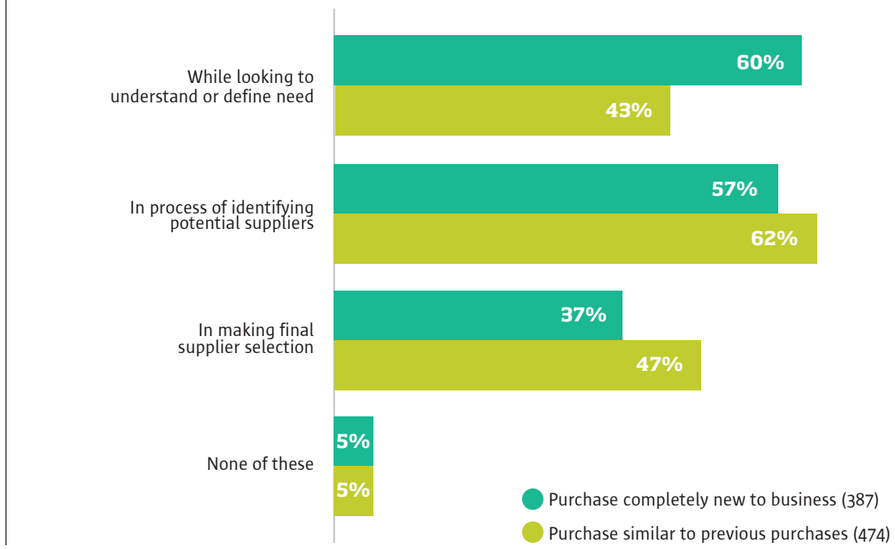
Respondents in Belgium were least likely to have made any contact in the two stages prior to making their final choice of supplier. In total, 45% of Belgian respondents interacted with suppliers when looking to define their need, and this figure did not increase much during the process of identifying potential suppliers (49%).

Those spending over £50k were more likely to make contact during the process of identifying potential suppliers (69%) than those spending less (58%), possibly reflecting the increased importance of making sure the best supplier is chosen as the investment size increases.

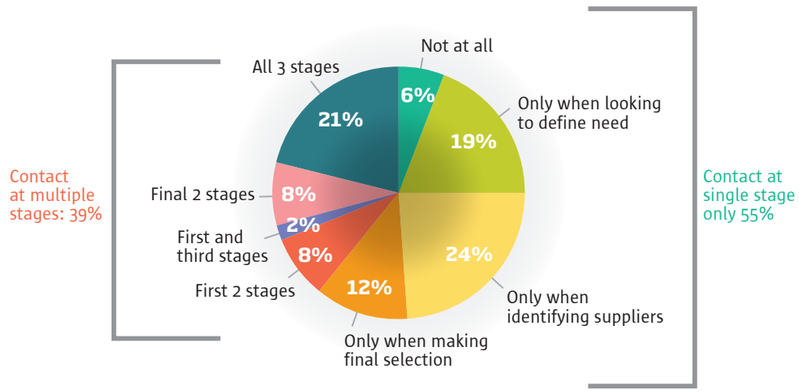
Familiarity with the purchase itself did have some influence on contact patterns. Those buying something completely new to their business were more likely to make contact with potential suppliers early on, when they were defining their need.

Whilst it is perhaps unsurprising that those with no experience of purchasing a product tend to seek early clarification, it is interesting that this pattern did not continue into the later stages of the purchase process. In fact, those purchasing something more familiar made more contact during the final selection process.

CONTACT WITH POTENTIAL SUPPLIERS - BY REPEAT/NEW PURCHASE



POINTS IN THE PURCHASE PROCESS AT WHICH POTENTIAL SUPPLIERS WERE CONTACTED



The chart above breaks down all the contact reported, to separate out single stage contacts from those engaging with suppliers more frequently during the purchase process. Over half of respondents made contact at one stage only, whilst almost four in ten engaged with suppliers multiple times during the purchase process. Interestingly, where there was engagement at multiple stages, this tended to be on-going throughout the entire purchase process, rather than at a specific combination of 2 out of the 3 stages.

WHO **MADE THE DECISIONS?**

PERSONAL INVOLVEMENT IN THE PURCHASE PROCESS

STAGE IN THE PROCESS	ANY PERSONAL INVOLVEMENT	MAIN DRIVER	SOLE RESPONSIBILITY
While looking to understand or define need	95%	80%	40%
In process of identifying potential suppliers	92%	78%	51%
In making final supplier selection	93%	77%	49%

Base: all respondents (1,017)

Those completing the survey had a high level of involvement in the purchase process. Almost all had at least some influence on each stage of the decision making process, and over three quarters identified themselves as the main driver at each stage. Even though the purchases being evaluated were relatively large, at least four in ten respondents reported that they were solely responsible for each stage of the purchase process.

Breaking the results down by country suggested that those in Belgium had less involvement than average (88% were involved in identifying the need, 76% helped identify potential suppliers and 79% were involved in the final selection).

Unsurprisingly, the larger the purchase, the less likely respondents were to report having sole responsibility for the decision. For purchases over £50k / €50, 30% had sole responsibility for identifying the need, 41% for identifying potential suppliers and 35% for the final supplier selection.

THE **FINDINGS**

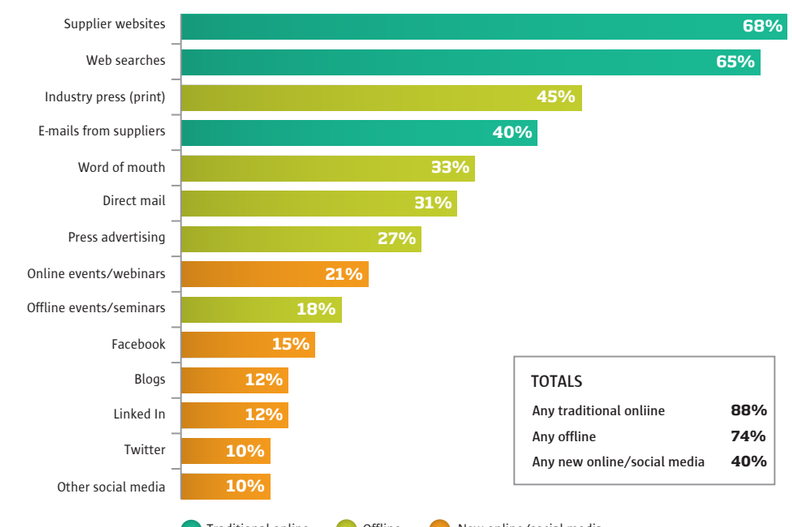
Buyer behaviour has changed totally over the last few years, and we all know that buyers have greater control over the way they research information to support their purchases. But before you invest every last cent in social media, be aware that 'traditional online' channels are by far the most influential. Email, web searches and supplier websites far outstrip Facebook and friends – for now...

Worth a **tweet?**

40% of B2B buyers use social media at some point in buying process ***#buyersphere11***
http://bit.ly/buyersphere11

WHERE DO BUYERS GET **INFORMATION?**

INFORMATION SOURCES USED AT ANY STAGE OF THE PROCESS



Base: All involved in at least one stage of the desicion making process (964)

Those who indicated they had at least some involvement at each stage of the purchase were shown a list of information sources and asked which ones they had used at that particular point in the process. The chart above illustrates the proportion of respondents using each of the sources at any time during the decision making process. Further stage by stage breakdowns are shown later in this section.

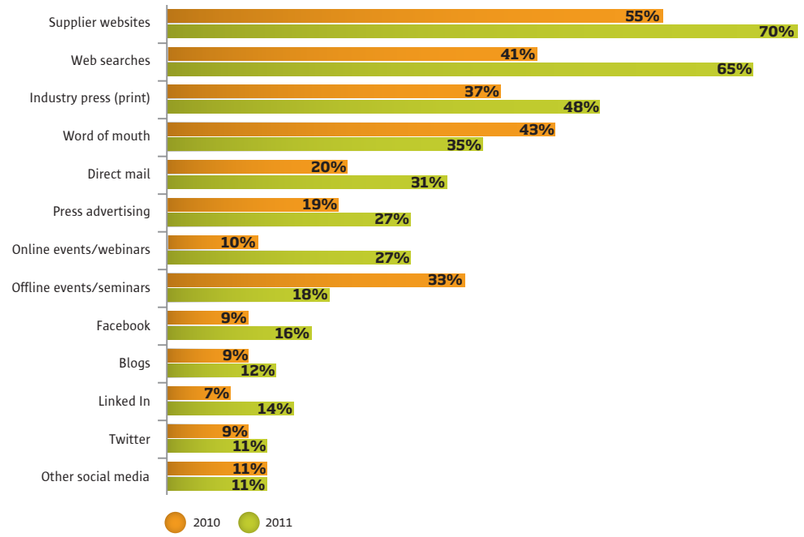
Supplier websites and web searches were clearly the most frequently used sources of information overall. The results showed that traditional online sources were most commonly utilised, followed by offline, with new online and social media sources used much less frequently overall. However, even though new media is the least used, four in ten decision makers are now incorporating the use of these tools into at least some part of their decision making process. Buyers under 30 are more likely to use new social media, with 15% using blogs to select suppliers, for example, compared to just 5% of over-30s. As this younger generation progresses into decision making roles, we may therefore see social media usage levels increase further.

HOW THIS CHANGED SINCE **LAST YEAR**

One of the biggest changes in buyer behaviour is the growing appetite for information. This is to be expected as we move from a traditional outbound model to an inbound model where brands need to produce more and more content to satisfy the hunger.

Yet while most channels were used more than in last year's report, offline events have seen a significant decrease. Has the sheer convenience of webinars made physical events a marketing tool of the past?

INFORMATION SOURCES USED AT ANY STAGE OF THE PURCHASE PROCESS 2010 COMPATED TO 2011 (UK ONLY)



Base: All involved in at least one stage of the desicion making process

Comparing the latest UK results with those recorded in 2010 shows that usage patterns have changed somewhat. The information sources that were most frequently used in 2010 have seen a reported increase in use, suggesting perhaps that buyers are sourcing increasing amounts of information during the purchase process.

The greatest increase was seen for online events / webinars, with use almost trebling to 27% from 10% in 2010. Interestingly, this was coupled with a drop in use of offline events or seminars. This could reflect that more buyers are finding the time and cost effectiveness of an online approach a real benefit, compared with actually booking onto and taking time out of the office to attend a traditional seminar.

Use of some types of social media during the purchase process has increased slightly, with 16% now using Facebook and 14% Linked In compared with 9% and 7% respectively in 2010.

Worth a **tweet?**

Facebook usage amongst B2B buyers up from 9% to 16%
#buyersphere11
http://bit.ly/buyersphere11

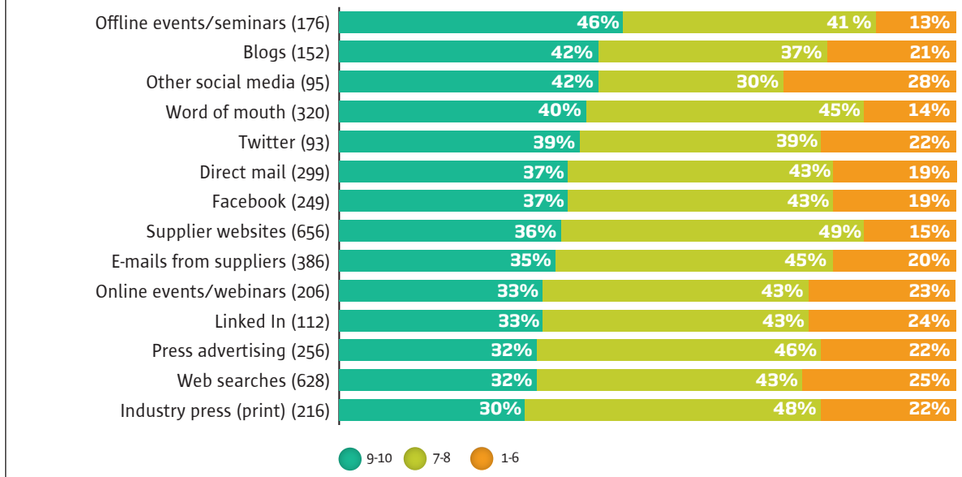
Worth a **tweet?**

B2B buyer usage of webinars has more than doubled. Attendance at real events has almost halved.
#buyersphere11
http://bit.ly/buyersphere11

WHICH HAS THE MOST **INFLUENCE?**

A channel's influence can often be surprising. For example, the influence of the offline seminar is far stronger than that of the webinar, yet we know that seminars are used far less frequently, so perhaps they shouldn't be replaced by their online counterparts after all...

OVERALL INFLUENCE OF INFORMATION SOURCES USED



Base: All using each channel in at least one stage of the decision making process

Looking at overall influence scores combining all three stages of the decision making process illustrates that despite a drop in use, offline events and seminars remain the most likely to be perceived as 'very influential'. New online media channels such as blogs, other social media and Twitter also appear near the top of this list, although it is important to note when looking at the proportions giving 9-10 out of 10 here, the level of variation is relatively low.

Other social media was the channel most likely to be given a score of 1-6 out of 10 for influence (by 28% of those providing a rating). This does suggest a certain level of polarisation of opinion for this information source.

Worth a **tweet?**

Physical events are considered "the most influential" information channel used by B2B buyers. ***#buyersphere11***
http://bit.ly/buyersphere11

...AND **BY COUNTRY?**

Brands work on a pan-European basis more and more, so it's fascinating to learn that the social media usage of the UK and Germany stands in sharp contrast to that of France, Italy, & Belgium. Are we looking at a two-tier Europe?

INFORMATION SOURCE	TOTAL	UK	FRANCE	GERMANY	ITALY	BELGIUM
Supplier websites	68%	70%	58%	66%	70%	73%
Web searches	65%	65%	67%	53%	81%	66%
Industry press (print)	40%	40%	36%	33%	54%	43%
E-mails from suppliers	45%	48%	28%	58%	46%	30%
Word of mouth	33%	35%	27%	28%	37%	36%
Direct mail	31%	31%	28%	35%	35%	25%
Press advertising	27%	27%	21%	30%	37%	15%
Online events/webinars	21%	27%	8%	25%	13%	16%
Offline events/seminars	18%	18%	13%	19%	29%	14%
Facebook	15%	16%	13%	22%	13%	5%
Blogs	12%	12%	6%	20%	16%	2%
Linked In	10%	11%	5%	15%	7%	2%
Twitter	12%	14%	4%	15%	14%	3%
Other social media	10%	11%	6%	13%	8%	5%
ANY TRADITIONAL ONLINE	88%	89%	87%	84%	93%	89%
ANY OFFLINE	74%	76%	64%	79%	74%	70%
ANY NEW ONLINE/SOCIAL MEDIA	40%	46%	22%	48%	35%	26%

Base: all respondents (1,017)

Worth a **tweet?**

UK and German B2B buyers use social media twice as much as French to research purchases. ***#buyersphere11***
http://bit.ly/buyersphere11

The table above shows information sources used in 2011 broken down by country. Green shading represents above average use, whilst red shading highlights any figures lower than average.

Looking at the shaded figures does indicate distinct differences in France and Belgium, where use of several sources was lower than that seen in the rest of Europe. Meanwhile, Italian respondents recorded above average levels of use for 4 sources of information, particularly web searches. Buyers in France in particular placed more emphasis on information from traditional online sources than their counterparts in other western European countries.

Overall, four in ten used information from new online or social media sources, although this was again much lower in Belgium (26%) and France (22%).

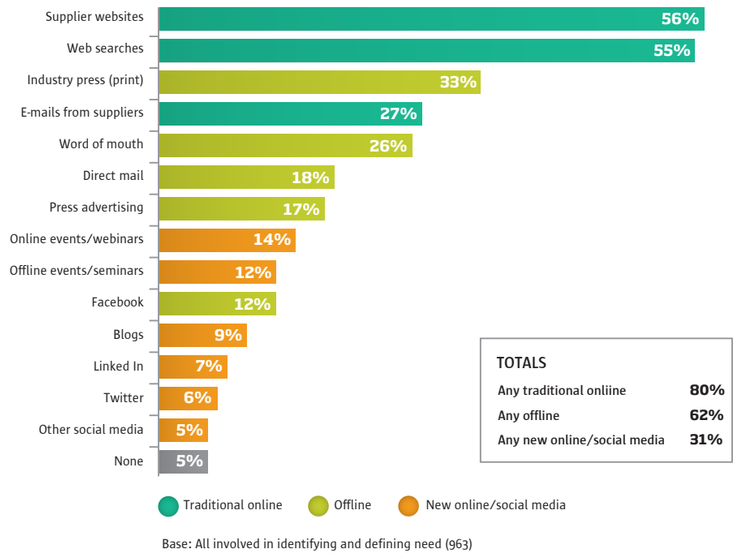
Worth a **tweet?**

15% of German B2B buyers use Twitter as part of purchase process. Only 2% of Belgians do so. ***#buyersphere11***
http://bit.ly/buyersphere11

THE COMPLETE **BUYING CYCLE**

The nearer the buyer gets to signing on the dotted line, the more influential the information sources become. Take a look at how usage and influence change at three key stages in the buying cycle: need identification, supplier identification, and final supplier selection.

INFORMATION SOURCES USED IN IDENTIFYING AND DEFINING NEED



Base: All involved in identifying and defining need (963)

As well as looking at overall use, it is useful to look at each stage in the purchase process individually. The chart above illustrates information use to help buyers identify and define their need.

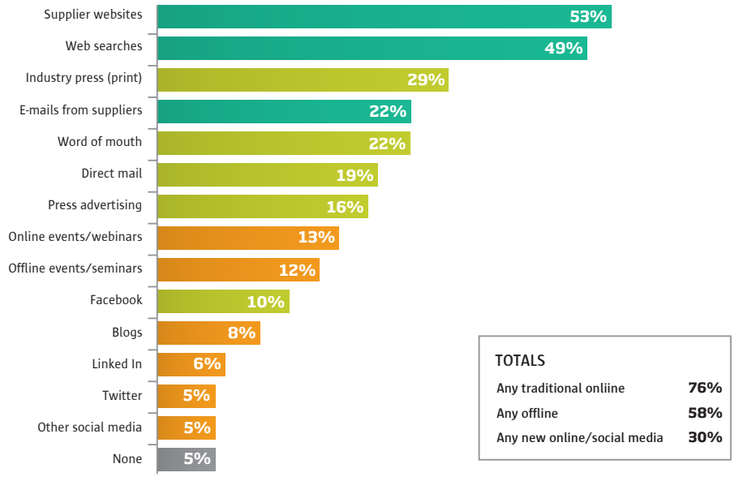
Supplier websites and more general web searches were clearly the most frequently used information sources at this stage. Three in ten used new online or social media to help identify their need, with webinars and Facebook most often utilised. Only 5% said they did not use any of the listed information sources at this stage.

Use of sources to help define needs did vary slightly by country, particularly use of industry press, which was lower in France (17%) and Belgium (21%) but higher in Germany (43%). As was the case in the overall picture, use of several sources was lower in Belgium than elsewhere, with 11% of Belgian respondents saying they used none of the listed channels.

Use of industry press, word of mouth, offline events/seminars and other social media was lower in 2011 at this stage than last year. However, use of online events / webinars increased slightly to 17% from 12% in 2010.

Younger purchasers were more likely to use Facebook (24%) or Twitter (11%) to help define or identify needs than their counterparts aged over 30 (10% and 5% respectively).

INFORMATION SOURCES USED IN IDENTIFYING POTENTIAL SUPPLIERS



Base: All involved in identifying and defining need (963)

Again, when buyers moved on to identifying potential suppliers, a clear pattern was evident, in which traditional online information sources were used most, followed by offline sources. New online sources were again used by three in ten buyers at this stage, although there is evidence to suggest that online webinars are starting to displace traditional seminars.

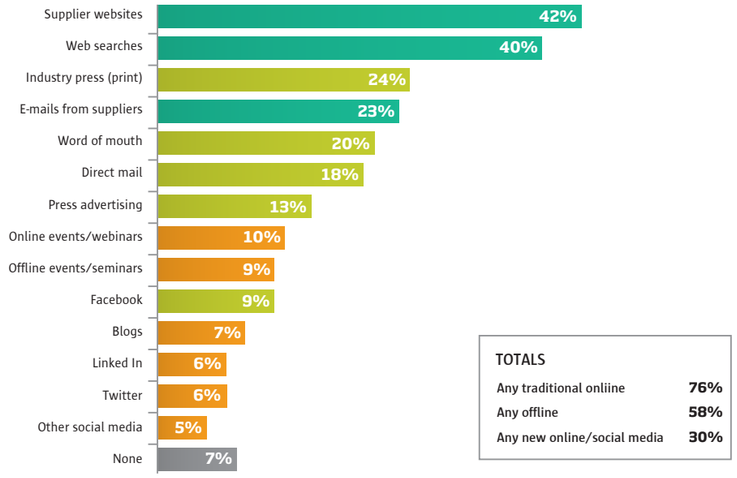
Use of new online/social media was average in France and Belgium. Although 8% of all buyers used blogs at this stage, in Belgium the figure was under 1%, whilst 14% of Belgian respondents used none of the listed channels. In Italy, there was an above average tendency to use traditional online sources (web searches 64%, supplier websites 60%, e-mails from suppliers 34%).

This greater level of online usage did not yet translate into higher than average adoption of new online tools or social media however.

Younger purchasers were more likely to use Facebook to help identify potential suppliers (18% compared with 9% of those aged over 30). There was less difference by age in the use of other new media sources at this stage.

Comparing 2010 and 2011 UK results showed a large decrease in the use of events/seminars (34% down to 11%) and word of mouth information (45% to 25%) at this stage. Use of online events and webinars increased, however, from 8% to 17%.

INFORMATION SOURCES USED IN SELECTING FINAL SUPPLIER



Base: All involved in identifying potential sales (933)

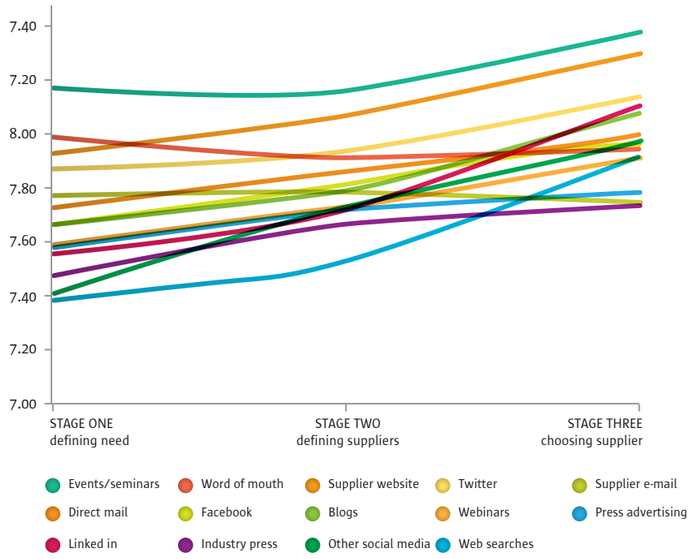
Use of the listed information sources was lowest at the end of the decision making process, during the selection of the final supplier, although the proportion using none of the sources remained low at 7%. Again, traditional online channels were most frequently used, whilst just under a quarter used new online / social media.

Again, use of several information sources was lower in Belgium and France, particularly the social media channels (Facebook, Linked In and Twitter were each used by just 1% of respondents in Belgium at this stage). Italian respondents were again more likely than their counterparts in other countries to use web searches (58%) and e-mails from suppliers (37%). They were also more likely than average to have attended seminars or offline events (18%).

Again the main age difference in use of information sources to help select a final supplier was in the level of use of Facebook (18% amongst those under 30, compared with 7% of older respondents). Younger respondents were also more likely to use blogs at this stage (15% compared with 5%).

In terms of change over time in the UK, the only major differences between 2010 and 2011 saw an increase in the use of web searches (from 25% to 39%) and a considerable drop in the use of events/ seminars (from 27% to 9%) and word of mouth information (from 40% to 23%).

INFLUENCE OF INFORMATION SOURCES OVER THE THREE STAGES OF THE PURCHASE PROCESS



Base: All involved in each stage

The chart above illustrates changes in perceived influence of each source over the course of the decision making process. Although search engines were consistently listed amongst the most frequently used sources of information, they were not seen as particularly influential.

Although use has dropped overall, events and seminars were still seen as the most influential information channel at all three stages. Interestingly, blogs were also highly rated when respondents were identifying and defining needs, and Twitter and word of mouth recommendations increased in influence as buyers move through the process.

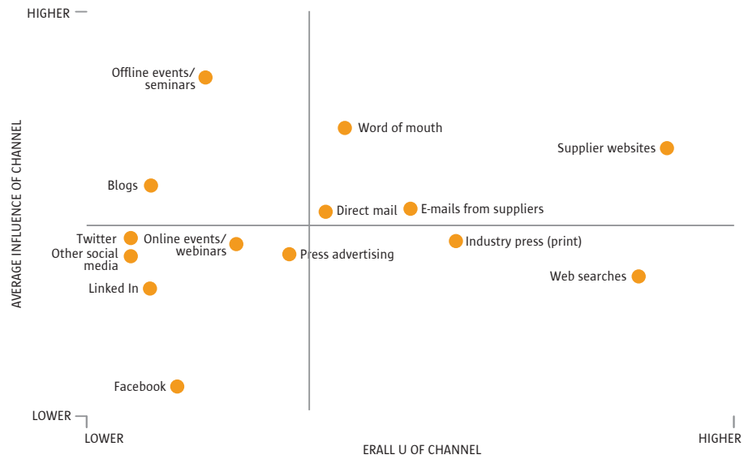
Worth a **tweet?**

Under 30s are three times more likely to use blogs to choose suppliers than older buyers ***#buyersphere11***
http://bit.ly/buyersphere11

INFLUENCE VS **USAGE**

Just because a channel is popular, doesn't mean it's taken seriously. This influence vs usage analysis gives an overview of all channels, showing that supplier websites are top of both stakes, and perhaps Facebook isn't an appropriate B2B tool after all...

CHANNEL USAGE AND INFLUENCE – ALL RESPONDENTS



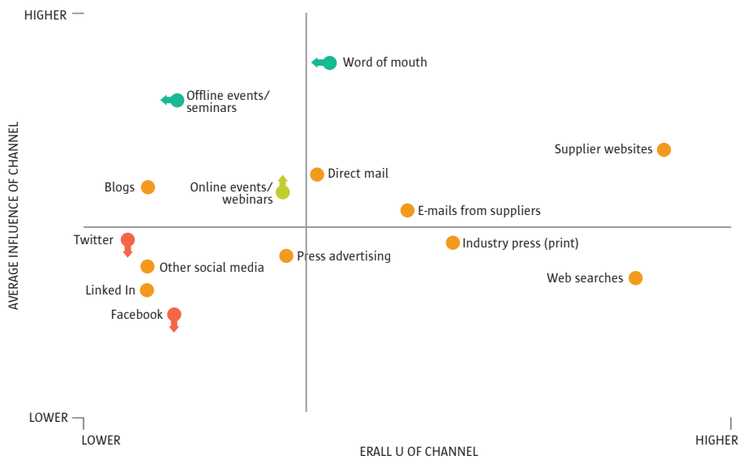
Base: All in the UK who used any channel at any stage (481)

Combining together the usage and influence data from across all stages of the process, it is possible to map how the various channels sit alongside each other.

Whilst supplier websites and web searches were clearly the most frequently utilised sources of information, this chart illustrates the clear difference when it comes to influence. Supplier websites were seen as the third most influential source as well as the most used, perhaps marking them as the most vital channel when making purchases of this size.

New online and social media sources of information are grouped on the left of the chart, indicating lower usage levels. However, the overall influence of each information source did vary considerably. Facebook was far and away the least influential overall (largely due to low influence scores during the first two phases of the purchase process). However, blogs were viewed as more influential overall than all but three of the other listed sources.

CHANNEL USAGE AND INFLUENCE – UK WITH CHANGE OVER TIME INDICATED



Base: All in the UK who used any channel at any stage (481)

Comparing the 2010 and 2011 results in the UK is also useful, in that it shows how use and attitudes towards each of the sources is changing. The chart above shows the 2011 results for the UK. Coloured arrows and circles indicate movement from their 2010 position.

Although word of mouth and offline seminars remain the two most influential sources of information in the UK, it is interesting that both have moved left on the chart, indicating that usage has decreased relative to use of other sources. This could reflect that use of these sources is being eroded by new media channels (although the increases recorded in new media use have been relatively small).

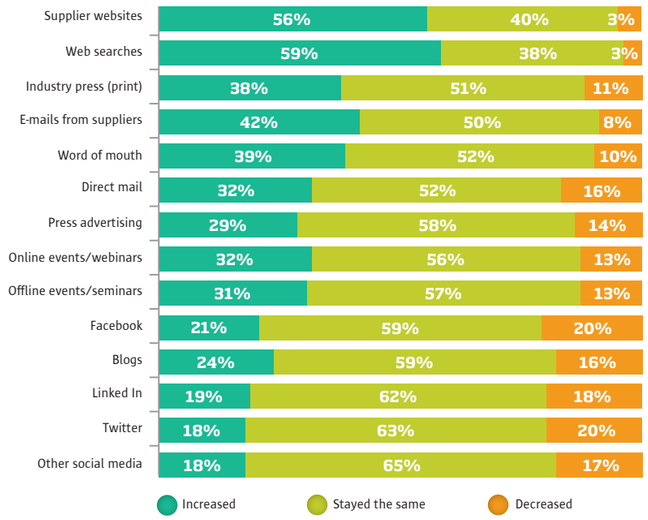
The movement of offline events/seminars from the top right segment to the top left has been coupled with an increase in perceived influence of online events/webinars. It is possible that the cost effectiveness of online events is becoming more attractive in the challenging economic climate.

There has been no corresponding move for social media such as Twitter and Facebook however. Both have seen a relative decrease in perceived influence. This could possibly be due to an increased amount of use by sceptics, in response to articles in marketing publications about the rise of these channels. Because it can be necessary to spend time building networks before these channels start becoming useful, those who do not reach this stage may well be writing these tools off as less influential. However, we have no way in this survey of separating out ‘expert’ users from new sceptics, so this is only a hypothesis at this stage.

THE PERCEPTION VS **THE REALITY...**

As the industry press declares this the year of social media take-up for B2B, buyers remain unconvinced about its impact, with an equal perceived increase and decrease in usage. But where else does the perception contradict the reality...?

PERCEIVED CHANGE IN USE OF INFORMATION SOURCES – OVERALL



Base: all respondents (1,017)

The questions covered in the previous section related to a specific purchase (the most recent time they made a purchase of over £/€20,000). More general questions were also asked to find out whether buyers' use of the listed information sources had changed overall.

Search engines and supplier websites saw the greatest increase in use. Around one in five reported an increase in use of each of the social media tools, but an equal proportion said use had decreased. Although use of offline events / seminars had dropped when looking at recent purchases (see section 4 of this report), this was not coupled with a perceived decrease overall.

Worth a **tweet?**

18% of B2B buyers say they use Twitter more this year. 20% say they use it less. ***#buyersphere11***
http://bit.ly/buyersphere11

EUROPEAN **VIEWS COMPARED?**

Are buyers thirstier than ever when it comes to knowledge? We've seen a marked increase in perceived use across almost all channels in all countries, but does France, Italy & Belgium's drop in social media use indicate a bigger picture of suspicion?

INFORMATION SOURCE	TOTAL	UK	FRANCE	GERMANY	ITALY	BELGIUM
Search Engines	56%	54%	65%	58%	68%	37%
Supplier websites	51%	51%	51%	47%	65%	43%
E-mails from suppliers	34%	31%	36%	30%	56%	25%
Industry press	27%	27%	26%	24%	34%	14%
Word of mouth	29%	29%	29%	27%	28%	23%
Online events/webinars	19%	19%	5%	21%	6%	14%
Direct mail	16%	16%	13%	17%	16%	18%
Offline events/seminars	18%	18%	3%	19%	28%	5%
Press advertising	15%	15%	9%	12%	28%	2%
Blogs	8%	8%	-6%	12%	19%	-13%
Facebook	1%	1%	-6%	8%	2%	-15%
Linked In	1%	1%	-9%	-1%	-9%	-12%
Other social media	1%	1%	-4%	5%	-9%	-6%
Twitter	-2%	-2%	-8%	3%	-5%	-15%

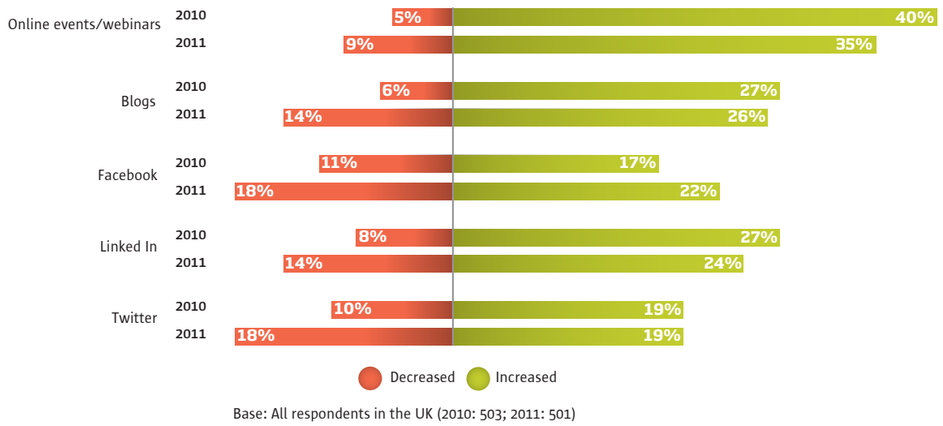
Base: all respondents

Breaking these results down by country shows clear differences across Europe. In the UK and Germany, a net increase was recorded for most information sources, although respondents in the UK were more likely to report a decrease in the use of Twitter, and in Germany net use of Linked In fell slightly.

In Italy, a considerable increase in use of traditional online sources was recorded, matching the pattern seen when evaluating recent purchases. Net decreases in use were recorded in Italy for Linked In, Twitter and other social media.

France and Belgium saw the most substantial net decreases in new online/social media use. French buyers reported net decreases in use of blogs, Facebook, Linked In, Twitter and other social media. In Belgium, this pattern was even more evident, with net decreases of over 10% for blogs, Facebook, Linked In and Twitter. Where net increases were reported in Belgium, these tended to be smaller than elsewhere in Europe.

PERCEIVED CHANGE IN USE OF INFORMATION SOURCES – OVERALL



Base: All respondents in the UK (2010: 503; 2011: 501)

Comparing the UK results for social media use over time indicates that whilst the proportion of buyers reporting an increase in the use of each information source has remained fairly stable, the group saying their use has decreased has grown. This is particularly the case for blogs (6% in 2010 to 14%), Facebook (11% in 2010 to 18%) and Twitter (10% in 2010 to 18%).

THE PROS & CONS OF SOCIAL MEDIA

Social media may continue to draw debate in the blogosphere, but are buyers that excited? The main finding of our analysis of sceptics vs fans shows that there is less polarisation than last year. With fewer respondents citing strengths and weaknesses, do we assume everyone is accepting it as just another channel?

BENEFITS OF USING BLOGS, ONLINE COMMUNITY SITES AND ONLINE VIDEOS/WEBINARS/PODCASTS WHEN LOOKING FOR BUSINESS RELATED INFORMATION

	UK	AGED UP TO 30	AGED OVER 30
ANY BENEFIT MENTIONED	30%	33%	30%
Other peoples opinions /experiences/reviews	9%	5%	10%
Honest unbiased views	3%	5%	2%
Lots of good information	3%	3%	3%
Wide variety of information	2%	3%	2%
Saves time/quick access	2%	3%	2%
Can get/give feedback	1%	3%	0%
Can see product being used	1%	3%	0%
Reliable	1%	3%	0%

Base: all respondents (1,017)

Finally, a series of questions was asked to improve understanding of attitudes in general towards new online sources of information.

Three in ten could name a benefit of using the listed online information sources. There was no evidence of a great deal of variation by age in responses to this question. However, buyers have become less likely to name benefits of using new online information sources (30% named benefits compared to 54% in 2010).

WEAKNESSES OF BLOGS, ONLINE COMMUNITY SITES AND ONLINE VIDEOS/WEBINARS/PODCASTS WHEN LOOKING FOR BUSINESS RELATED INFORMATION

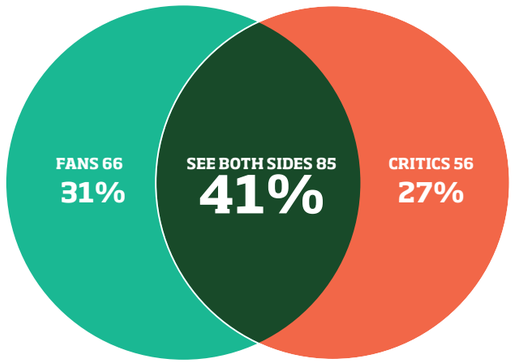
	UK	AGED UP TO 30	AGED OVER 30
ANY WEAKNESS MENTIONED	28%	22%	29%
Don't trust information/ unreliable	5%	8%	5%
Biased information	4%	1%	4%
Quality/accuracy of infomation	3%	0%	4%
Too much information to go through/often irrelevant	3%	3%	3%
Don't know source of information	2%	1%	3%
Varied opinions/ too opinionated	1%	3%	1%
Not many people/ organisations look at those pages	0.3%	3%	1%

Plus other mentioned by no more than 1% of any subgroup
Base: all respondents in the UK (501)

Almost three in ten could name a weakness of new online information sources. Those aged over 30 were slightly more likely to be able to do so. Many of the weaknesses mentioned related to information reliability.

Buyers have also become less likely to name weaknesses of using new online information sources (28% did so in 2011 compared to 59% in 2010). However, the issues mentioned by those who did name something have remained the same.

SUMMARY OF OPINION



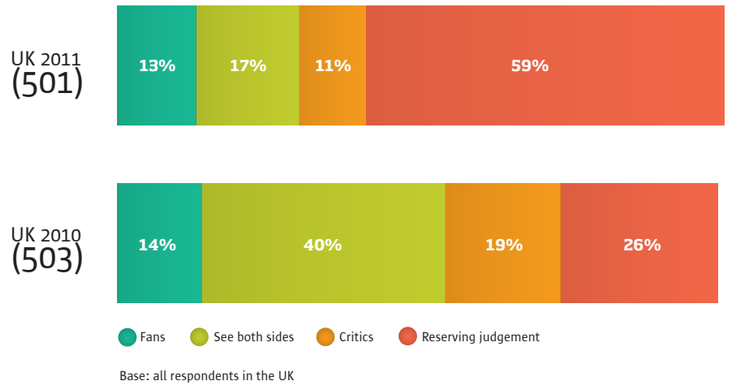
FAN	mention a 'benefit' of SM *AND* 'no weakness'
CRITIC	mention a 'weakness' of SM *AND* 'no benefit'
SEE BOTH SIDES	mention both a 'benefit' *AND* 'weakness' of SM

Using the responses to the open ended questions about strengths and weaknesses, it is possible to categorise those with opinions into three groups, as shown in the diagram above.

Similar proportions of respondents were classified as 'fans' and 'critics' of the listed online information sources. Fans were more likely to be under 30 years old (15% compared to 4% of critics). The proportion of respondents in the 'fans' category has increased to 31% from 19% in 2010. This represents a move from the 'see both sides' group (55% in 2010). Unsurprisingly, critics are less likely to have used social media to help with their last purchase (23% compared with 59% of fans).

Of course, although when we look at those with an opinion we see an increase in the proportion of 'fans', this does not take into account the fact that 2011 saw a far smaller proportion of buyers actually giving an opinion. The charts opposite illustrate the 2010 and 2011 results with this 'reserving judgement' group included.

SUMMARY OF OPINION – OVER TIME



Base: all respondents in the UK

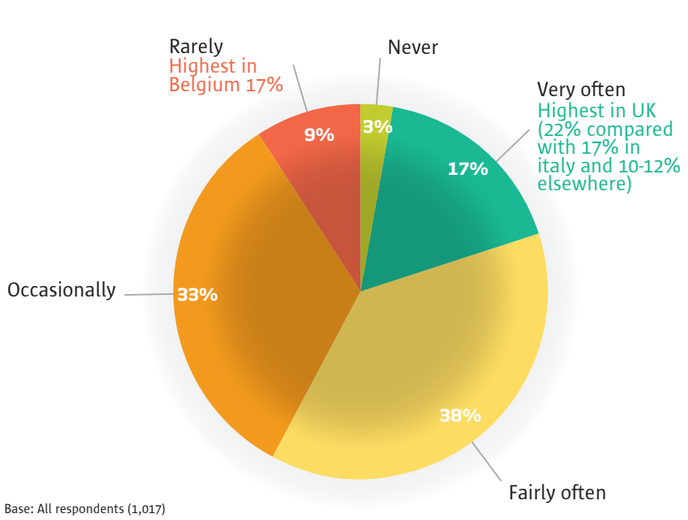
When those who did not give an opinion either way were included, the results show that the proportion of 'fans' of social media overall has remained stable. However, the percentage that sees both sides has fallen by more than half, and the proportion of critics dropped from 19% to 11%.

Much of course depends on the underlying attitude of the group in the 'reserving judgement' category. In 2011, most of these said they could not think of any weaknesses or strengths of new online media sources. This could suggest either an increasing ambivalence towards these channels, or perhaps more of an acceptance of them for what they are (i.e. they may not be seen as particularly new or different any more, hence buyers are less likely to think of them in terms of having particular strengths and weaknesses).

SHOULD BUYERS GIVE YOU **THEIR DATA?**

Be confident with your content strategy and tread carefully with data capture, as over half of all buyers are discouraged by it when trying to access information. There were geographical differences here too, as 22% of wary Brits said they were discouraged very often, double the number of German, French and Belgian buyers.

FREQUENCY OF BEING DISCOURAGED FROM ACCESSING BUSINESS RELATED INFORMATION AS A RESULT OF HAVING TO FILL IN A DATA CAPTURE FORM



Base: All respondents (1,017)

Finally, some new questions were asked about specific aspects relating to the use of online sources of information. The chart above illustrates reaction to having to fill in data capture forms when accessing business related information online.

Worth a **tweet?**

UK B2B buyers are twice as likely to be discouraged from downloading by data capture forms. ***#buyersphere11***
http://bit.ly/buyersphere11

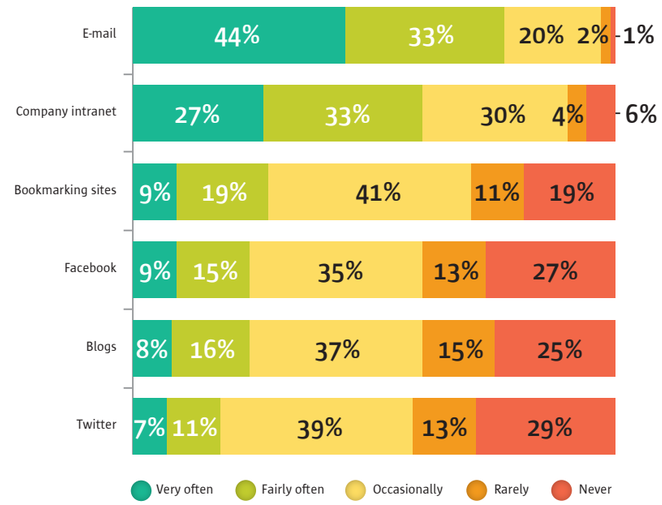
Over half of respondents said that they had been discouraged from accessing information online because of the need to provide their details. Buyers in the UK felt most strongly about this, with 22% reporting being put off 'very often'.

Only 12% said that this was 'rarely' or 'never' a concern, although this figure was higher in Belgium (17% rarely, 5% never).

HOW DO **BUYERS SHARE CONTENT?**

Whilst Facebook, LinkedIn and Twitter are designed with sharing in mind, it seems that email and company intranet channels are far more popular. Is it a case of more targeted sharing, or even enabling privacy?
Or simply familiarity?

FREQUENCY OF USING METHODS TO SHARE PROFESSIONAL CONTENT



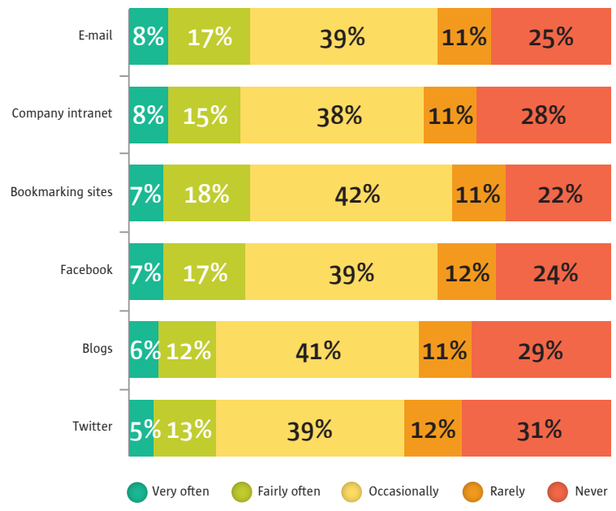
Base: all respondents (1,017)

E-mail was clearly the channel most frequently used to share professional content. Social media is not being as widely used for this purpose at present, although there is still a considerable minority of around a quarter using Facebook and Twitter very or fairly often for this reason.

Worth a **tweet?**

7% of B2B buyers share information via Twitter. 22% do it via the company intranet. ***#buyersphere11***
http://bit.ly/buyersphere11

FREQUENCY OF USING METHODS TO CREATE AND PUBLISH PROFESSIONAL CONTENT



Base: all respondents (1,017)

There was no clear preferred channel when it came to creating and publishing original professional content. Around two in ten used each channel ‘very’ or ‘fairly’ often.

A WORD OF **THANKS**

Thank you for reading

We have done everything we can to make this report as useful as possible. But, while it doesn’t claim to have all the answers, we hope it has encouraged you to ask a few more questions.

There’s no doubt that B2B buyers are changing the way they seek information, and this of course affects how we, as marketers, try to meet their needs. Whether you decide to invest in your website, in social media, SEO, advertising or any of the other options open to you depends on many factors. We simply hope that you may be slightly closer to the right decision after reading this.

If you have been reading this in print and would like a digital copy, please visit **www.baseone.co.uk.**

And of course, if you would like some help with planning how your brand accommodates changing buyer behaviour, we’d be more than happy to talk.

Regards

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