

MEDIA CONSUMPTION SURVEY

ITC INFRASTRUCTURE MARKET
DECEMBER 2010



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Introduction

This survey was run over a period of 3 days at the beginning of December 2010. It was decided that with consideration to the time of year and that Emerson survey activity during the quarter had been high, a short (single pass) approach would be adopted. Over the course of 3 days, over 120 respondents completed the survey.

Executive Summary

The previous media consumption survey was run in October 2008. The principle findings of that study can be summarized as follows;

1. Trade Magazine readership was a primary source of information with over 65% of respondents indicating regular usage.
2. Trade & Industry Events remained very popular with almost 80% of respondents noting regular attendance (over 88% in Australia).
3. Internet was generally noted as a useful source of information with 55% of respondents rating it as one of several ITC sources.

The current study considers several key dimensions in framing the current media climate in Asia;

1. Geography: Notable behavioral differences between Australia and South East Asia respondents will influence tactics relative to those regions.
2. Influence: Respondents were asked to note, who within their organization was the primary decision maker with respect to ITC Infrastructure projects. In addition to the general insight revealed by the study, the intention was to test the proposition that we should more actively shape our message around the primary decision makers in target businesses.
3. Role: Respondents were segmented per their relationship with Emerson, namely if their business used, specified or bought and sold Emerson products & services.

Notable findings:

- General behavior associated with media consumption differs widely between Australia and the Rest Of Asia segment
- Word of Mouth and personal testimonial retains a strong hold throughout the market
- The influence of industry events is on the wane. Underlying reasons for this will form the basis of a follow-up study.
- Within the media landscape, new media (online) significantly outranks old media (print) in terms of influence and usage. This is consistent across all dimensions, however there are variations in emphasis between AU and ROA.
- Vendor responsibility to offer easy and readily available information is essential.
- Further to this, respondents are looking to vendors as a key source of information pertaining to their green credentials.
- In isolation, more traditional channels of media are preferred sources for green sensitive respondents.

Demographics

1. Respondents (Geography & Role)

Region	End User	Consultant	Reseller	(blank)	% By Region
AU	48%	20%	32%	0%	60%
ROA	83%	8%	0%	8%	19%
NR	0%	0%	0%	100%	21%
% By Role	45%	14%	19%	22%	

2. Respondents (Influence)

Who is the primary decision maker?	AU	ROA	Total
C Level	57.3%	62.5%	58.6%
Manager	42.7%	37.5%	41.4%

Information Sources

1. Primary Choice of Information Source

Respondents were asked to indicate where they most often go to find information on new IT products/services for their business?

Where do you look for information on new IT products/services for your business?	Top 2 Box Total	Top 2 Box AU	Top 2 Box ROA
Vendor/manufacturer web sites	48.0%	48.5%	24.8%
Advice from colleagues and peers	40.0%	41.6%	16.8%
Articles and reviews in IT media	37.6%	34.7%	18.8%
Salespeople	25.6%	27.7%	9.9%
Articles and reviews in business media	23.2%	19.8%	16.8%
Trade shows	14.4%	14.9%	6.9%
Other Sources	7.2%	8.9%	3.0%
Articles and reviews in daily newspapers	4.0%	4.0%	2.0%

Media Consumption
Poll of IT&C Infrastructure Professionals
December 2010

Respondents rated their choices from most important (Rate 1) to least important (Rate 8). The above table is a “Top 2 Box” score of the total sample and then by a basic Australia / Rest of Asia. A simpler way of interpreting this information can be achieved by grouping responses as per below;

Where do you look for information on new IT products/services for your business?	Top 2 Box Total	Top 2 Box AU	Top 2 Box ROA
Old Media	64.8%	58.4%	37.6%
New Media	48.0%	48.5%	24.8%
Word Of Mouth	65.6%	69.3%	26.7%
Events	14.4%	14.9%	6.9%
Other	7.2%	8.9%	3.0%

In short, “word of mouth” predominates (marginally over old media) in Australia, whereas the order is reversed in ROA but by a larger margin. It should be noted however that the importance placed on vendor websites is very significant considering it represents a singular point of access vs the other sources.

2. Relative to Primary Decision Maker

The same data can be viewed through the paradigm of the nominated primary decision maker.

Where do you look for information on new IT products/services for your business?	Top2 Box		Top2 Box AU		Top2 Box ROA	
	C Level	Manager	C Level	Manager	C Level	Manager
Primary Influencer						
Old Media	63.0%	67.3%	41.1%	55.8%	32.9%	26.9%
New Media	53.4%	40.4%	45.2%	30.8%	20.5%	19.2%
Word Of Mouth	67.1%	63.5%	56.2%	55.8%	21.9%	21.2%
Events	12.3%	17.3%	12.3%	11.5%	5.5%	5.8%
Other	4.1%	11.5%	4.1%	11.5%	1.4%	3.8%

In general and in the AU sample, there are differences in rating order as well as between the respondent segments. The ROA sample maintains a consistent order across the segments.

Further to the “Top 2 Box” scores as a means to understanding the impact of “influence” on media consumption, the delta between the segment scores by

Media Consumption
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geography offers insight into significant regional differences. This format is used throughout the study as a guide to areas of regional contrast.

As per the chart below, the primary differences between C Level and Manager as well as across regions can be clearly identified.

Where do you look for information on new IT products/services for your business?	Delta C Level Vs Manager / Primary Influencer			
	Total	AU	SEA	AU Vs SEA
Old Media	-4.3%	-14.7%	6.0%	-20.6%
New Media	13.0%	14.4%	1.3%	13.1%
Word Of Mouth	3.7%	0.4%	0.8%	-0.4%
Events	-5.0%	0.8%	-0.3%	1.1%
Other	-7.4%	-7.4%	-2.5%	-5.0%

- ✘ Significant variance in consumption between regions
- ✓
- ✓
- ✓



Positive number indicates a higher preference for media where C Level Exec is primary Influencer vs Manager. A negative number indicates the reverse.

3. Relative to Position on Supply Chain

The same data can be viewed through the paradigm of where the respondent sits vis a vie their relationship with Emerson.

Where do you look for information on new IT products/services for your business?	Top2 Box		Top2 Box AU		Top2 Box ROA	
	EndUser	Other	EndUser	Other	EndUser	Other
Primary Influencer						
Old Media	85.7%	47.8%	51.8%	43.5%	33.9%	27.5%
New Media	41.1%	53.6%	23.2%	52.2%	17.9%	21.7%
Word Of Mouth	53.6%	75.4%	35.7%	72.5%	17.9%	24.6%
Events	12.5%	15.9%	10.7%	13.0%	1.8%	8.7%
Other	7.1%	7.2%	7.1%	7.2%		4.3%

End User behaviour differs remarkably in general and specifically in Australia. In the ROA sample, the behaviour is more similar.

As per the previous dimension, the primary differences between End Users and the balance of the sample, as well as across regions can be clearly identified per the chart below.

Where do you look for information on new IT products/services for your business?	Delta EndUser Vs Other			
	Total	AU	SEA	AU Vs SEA
Old Media	37.9%	8.3%	6.4%	1.9%
New Media	-12.6%	-29.0%	-3.9%	-25.1%
Word Of Mouth	-21.8%	-36.7%	-6.8%	-30.0%
Events	-3.4%	-2.3%	-6.9%	4.6%
Other	-0.1%	-0.1%	-4.3%	4.2%

- ✓
- ✗ Significant variance in
- ✗ consumption between regions
- ✓
- ✓



Positive number indicates a higher preference for media with End User Vs Other (Consultant or Reseller). A negative number indicates the reverse.

Media Selection

1. Primary Choice of Media

Respondents were asked to indicate which media would they turn to when sourcing information on new IT products/services for their business?

In terms of media influencers, what are your sources of IT information?	Top 2 Box	Top 2 Box	Top 2 Box
	Total	AU	ROA
Traditional print media (newspapers, magazines)	29.6%	27.7%	32.0%
Trade media (IT print magazines)	59.2%	59.4%	56.0%
Online media (magazine web sites, portals etc.)	86.4%	88.1%	82.0%
New media (blogs, podcasts)	24.8%	24.8%	30.0%
Old Media	88.8%	87.1%	88.0%
New Media	111.2%	112.9%	112.0%

In contrast to the previous survey completed in 2008, respondents now indicate a far greater readiness to source relevant material from online information providers. This is consistent across all geographies.


2. Relative to Primary Decision Maker

The same data can be viewed through the paradigm of the nominated primary decision maker, which again offers a consistent order across the nominated segment.

Where do you look for information on new IT products/services for your business? Primary Influencer	Top2 Box		Top2 Box AU		Top2 Box ROA	
	C Level	Manager	C Level	Manager	C Level	Manager
Traditional print media (newspapers, magazines)	34.2%	23.1%	27.4%	15.4%	9.6%	17.3%
Trade media (IT print magazines)	54.8%	65.4%	42.5%	55.8%	26.0%	17.3%
Online media (magazine web sites, portals etc.)	89.0%	82.7%	71.2%	71.2%	37.0%	26.9%
New media (blogs, podcasts)	21.9%	28.8%	17.8%	23.1%	9.6%	15.4%
Old Media	89.0%	88.5%	69.9%	71.2%	35.6%	34.6%
New Media	111.0%	111.5%	89.0%	94.2%	46.6%	42.3%

Where do you look for information on new IT products/services for your business?	Delta C Level Vs Manager / Primary Influencer			
	Total	AU	SEA	AU Vs SEA
Traditional print media (newspapers, magazines)	11.2%	12.0%	-7.7%	19.7%
Trade media (IT print magazines)	-10.6%	-13.3%	8.7%	-22.0%
Online media (magazine web sites, portals etc.)	6.3%	0.1%	10.1%	-10.0%
New media (blogs, podcasts)	-6.9%	-5.3%	-5.8%	0.5%
Old Media	0.6%	-1.3%	1.0%	-2.3%
New Media	-0.6%	-5.2%	4.3%	-9.5%

✖ Significant variance
 ✖ in consumption
 ✖ between regions
 ✓


 Positive number indicates a higher preference for media where C Level Exec is primary Influencer vs Manager. A negative number indicates the reverse.

From a planning perspective, the behavioral differences (C Level vs Manager) between Australia and Rest of Asia are significant.

3. Relative to Position on Supply Chain

The same data can be viewed through the paradigm of where the respondent sits vis a vie their relationship with Emerson.

Where do you look for information on new IT products/services for your business? Primary Influencer	Top2 Box		Top2 Box AU		Top2 Box ROA	
	End User	Other	End User	Other	End User	Other
Traditional print media (newspapers, magazines)	26.8%	31.9%	14.3%	29.0%	12.5%	13.0%
Trade media (IT print magazines)	58.9%	59.4%	39.3%	55.1%	19.6%	24.6%
Online media (magazine web sites, portals etc.)	92.9%	81.2%	60.7%	79.7%	32.1%	33.3%
New media (blogs, podcasts)	21.4%	27.5%	14.3%	24.6%	7.1%	15.9%
Old Media	85.7%	91.3%	53.6%	84.1%	32.1%	37.7%
New Media	114.3%	108.7%	75.0%	104.3%	39.3%	49.3%

Where do you look for information on new IT products/services for your business?	Delta End User Vs Other				
	Total	AU	SEA	AU Vs SEA	
Traditional print media (newspapers, magazines)	-5.1%	-14.7%	-0.5%	-14.2%	✗ Significant variance in consumption between regions
Trade media (IT print magazines)	-0.5%	-15.8%	-5.0%	-10.8%	✗
Online media (magazine web sites, portals etc.)	11.7%	-19.0%	-1.2%	-17.8%	✗
New media (blogs, podcasts)	-6.1%	-10.4%	-8.8%	-1.6%	✓
Old Media	-5.6%	-30.5%	-5.5%	-24.9%	
New Media	5.6%	-29.3%	-10.0%	-19.4%	



Positive number indicates a higher preference for media where respondent is an Enduser. A negative number indicates the reverse.

From a planning perspective, the behavioral differences (End User Vs Other) between Australia and Rest of Asia are significant.

Other Influencers

1. Primary Other Influence

Respondents were asked to indicate where they would turn to (from outside of the media) when sourcing information on new IT products/services

Outside of the media, what are your influencers for buying new technology?	Top 2 Box Total	Top 2 Box AU	Top 2 Box ROA
Vendors	46.4%	43.6%	52.0%
Suppliers and service providers	56.0%	56.4%	64.0%
Customers	43.2%	45.5%	32.0%
Peers	41.6%	42.6%	32.0%
Competitors	12.8%	11.9%	20.0%


The high rating of Customers and Peers in Australia lends weight to the view that “Success Stories” and customer testimonials are a valuable communication tool there. The fact however, that respondents rely on Vendors and Suppliers as a primary source of information emphasizes the need for clear and easy lines of communication.

2. Relative to Primary Decision Maker

Outside of the media, what are your influencers for buying new technology?	Top2 Box		Top2 Box AU		Top2 Box ROA	
	C Level	Manager	C Level	Manager	C Level	Manager
Primary Influencer						
Vendors	49.3%	42.3%	48.3%	37.2%	53.3%	50.0%
Suppliers and service providers	54.8%	57.7%	53.4%	60.5%	66.7%	60.0%
Customers	43.8%	42.3%	48.3%	41.9%	30.0%	35.0%
Peers	38.4%	46.2%	37.9%	48.8%	30.0%	20.6%
Competitors	13.7%	11.5%	12.1%	11.6%	20.0%	20.0%

Outside of the media, what are your influencers for buying new technology?	Delta C Level Vs Manager / Primary Influencer			
	Total	AU	SEA	AU Vs SEA
Vendors	7.0%	11.1%	3.3%	7.7%
Suppliers and service providers	-2.9%	-7.0%	6.7%	-13.7%
Customers	1.5%	6.4%	-5.0%	11.4%
Peers	-7.8%	-10.9%	9.4%	-20.3%
Competitors	2.2%	0.4%	0.0%	0.4%

- ✓
- ✗ Significant variance in consumption between regions
- ✗
- ✓



Positive number indicates a higher preference for media where C Level Exec is primary Influencer vs Manager. A negative number indicates the reverse.

3. Relative to Position on Supply Chain

Outside of the media, what are your influencers for buying new technology?	Top2 Box		Top2 Box AU		Top2 Box ROA	
	End User	Other	End User	Other	End User	Other
Vendors	51.8%	42.0%	44.4%	43.1%	65.0%	43.3%
Suppliers and service providers	58.9%	53.6%	55.6%	56.9%	65.0%	63.3%
Customers	41.1%	44.9%	44.4%	46.2%	35.0%	30.0%
Peers	39.3%	43.5%	47.2%	40.0%	25.0%	19.6%
Competitors	8.9%	15.9%	8.3%	13.8%	10.0%	26.7%

Outside of the media, what are your influencers for buying new technology?	Delta End User Vs Other				
	Total	AU	SEA	AU Vs SEA	
Vendors	9.8%	1.4%	21.7%	-20.3%	✗
Suppliers and service providers	5.3%	-1.4%	1.7%	-3.0%	✓
Customers	-3.9%	-1.7%	5.0%	-6.7%	✓
Peers	-4.2%	7.2%	5.4%	1.9%	✓
Competitors	-7.0%	-5.5%	-16.7%	11.2%	✗



Positive number indicates a higher preference for media where respondent is an Enduser. A negative number indicates the reverse.

Green

1. Importance

Respondents were asked to rate the importance of green technology to their business.

Rate the importance of green technology to your business	Total	AU	ROA
Rated 5 "critical"	19.2%	17.8%	24.0%
4	44.0%	43.6%	42.0%
3	25.6%	25.7%	30.0%
2	6.4%	6.9%	2.0%
Rated 1 "not important"	4.8%	5.9%	2.0%

2. Relative to Primary Decision Maker

Rate the importance of green technology to your business Primary Influencer	Total		AU		ROA	
	C Level	Manager	C Level	Manager	C Level	Manager
Rated 5 "critical"	19.2%	19.2%	17.2%	18.6%	23.3%	25.0%
4	42.5%	46.2%	41.4%	46.5%	43.3%	40.0%
3	30.1%	19.2%	31.0%	18.6%	30.0%	30.0%
2	2.7%	11.5%	3.4%	11.6%	0.0%	5.0%
Rated 1 "not important"	5.5%	3.8%	6.9%	4.7%	3.3%	0.0%

Rate the importance of green technology to your business	Delta C Level Vs Manager / Primary			
	Total	AU	SEA	AU Vs SEA
Rated 5 "critical"	-0.1%	-1.4%	-1.7%	0.3%
4	-3.7%	-5.1%	3.3%	-8.5%
3	10.9%	12.4%	0.0%	12.4%
2	-8.8%	-8.2%	-5.0%	-3.2%
Rated 1 "not important"	1.6%	2.2%	3.3%	-1.1%

- ✓
- ✗ Significant variance in consumption between regions
- ✗
- ✓
- ✓

Positive number indicates a higher preference for media where C Level Exec is primary Influencer vs Manager.
A negative number indicates the reverse.

3. Relative to Position on Supply Chain

Rate the importance of green technology to your business	Total		AU		ROA	
	End User	Other	End User	Other	End User	Other
Rated 5 "critical"	21.4%	17.4%	19.4%	16.9%	25.0%	23.3%
4	46.4%	42.0%	47.2%	41.5%	45.0%	40.0%
3	19.6%	30.4%	16.7%	30.8%	25.0%	33.3%
2	8.9%	4.3%	11.1%	4.6%	5.0%	0.0%
Rated 1 "not important"	3.6%	5.8%	5.6%	6.2%	0.0%	3.3%

Rate the importance of green technology to your business	Delta End User Vs Other			
	Total	AU	SEA	AU Vs SEA
Rated 5 "critical"	4.0%	2.5%	1.7%	0.9%
4	4.4%	5.7%	5.0%	0.7%
3	-10.8%	-14.1%	-8.3%	-5.8%
2	4.6%	6.5%	5.0%	1.5%
Rated 1 "not important"	-2.2%	-0.6%	-3.3%	2.7%

- ✓
- ✗ Significant variance in consumption between regions
- ✗
- ✓
- ✓

Positive number indicates a higher preference for media where respondent is an Enduser. A negative number indicates the reverse.

4. Information Sourcing for Green

Further to the three filters previously used to segment and better understand the responses, the following tables illustrate behavior when the sample is confined to those respondents who rate “Green” highly in their business (ie either a 5 or 4 rating).

Where Green is rated as important (4 or 5) to your business, where do you source information on new IT products/services?	Total	AU	ROA	End User	Other	C Level	Manager
New Media	44.3%	43.5%	39.4%	44.7%	43.9%	48.9%	38.2%
Word Of Mouth	19.0%	19.4%	15.2%	15.8%	22.0%	17.8%	20.6%
Old Media	16.5%	16.1%	24.2%	18.4%	14.6%	15.6%	17.6%
Events	13.9%	12.9%	15.2%	15.8%	12.2%	13.3%	14.7%
Other	6.3%	8.1%	6.1%	5.3%	7.3%	4.4%	8.8%

5. Media preferences for Green

Where Green is rated as important (4 or 5) to your business, which media do you source information on new IT products/services?	Total	AU	ROA	End User	Other	C Level	Manager
New Media	29.1%	30.6%	21.2%	28.9%	29.3%	28.9%	29.4%
Old Media	53.2%	51.6%	57.6%	63.2%	43.9%	55.6%	50.0%
No Preference	17.7%	17.7%	21.2%	7.9%	26.8%	15.6%	20.6%

6. Alternate Information sources for Green

Where Green is rated as important (4 or 5) to your business, where do you source information on new IT products/services outside of media services?	Total	AU	ROA	End User	Other	C Level	Manager
Customers	24.1%	24.2%	21.2%	28.9%	19.5%	26.7%	20.6%
Peer	22.8%	24.2%	15.2%	18.4%	26.8%	22.2%	23.5%
Vendors and Suppliers	49.4%	50.0%	54.5%	52.6%	46.3%	48.9%	50.0%
Competition	3.8%	1.6%	9.1%	0.0%	7.3%	2.2%	5.9%

Social Media

Do you use social media (facebook, twitter) for business or personal use?	Do you look to social media as an influencer for buying decisions?		
	Yes	No	Total
Yes	42.6%	57.4%	48.8%
No			51.2%
Total	20.8%	79.2%	

Respondents who Use Social Media as an influencer for buying decisions.	AU	ROA
C Level	71%	60%
Manager	29%	40%