



Dawn of The Disruptive CIO

Tech Market Insight prepared by Octopus Group,
on behalf of ION





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UNDERSTANDING PURCHASING DECISIONS

It's a year since we published Tech Heads 2012 and examined the ways IT decision makers find, consume and digest the information that informs their purchasing decisions.

We do this because we're specialists in technology communications, so it's imperative to have an intimate understanding of the comms sources that influence the IT decision makers our clients need to engage with.

Where do they get the information that helps them decide where to spend their IT budget? How do the different information sources compare in terms of influence? Are consumption habits changing? What are the trends, what do they tell us and how does the IT supplier community need to adapt to embrace them?

The questions are the easy bit; finding – and understanding – the answers is where Tech Heads comes in.

Tech Heads 2012 focused on the UK and attracted a great deal of interest, with the revelation that the 'retro' CIO exists. The double whammy of technological and financial pressures has forced this group of individuals to revert to tried and tested communications when making procurement decisions.

Tech Heads 2013 looks at the perspectives of international CIOs, comparing and contrasting the UK, US, France and Germany, as well as investigating the detailed picture in each country.

It's imperative to have an intimate understanding of the sources that influence the IT decision makers our clients need to engage with

THE RESEARCH METHODOLOGY

A survey of 1,000 CIOs in companies with 1000+ employees during July 2013, with numbers spread equally across the UK, the US, Germany and France.

The research was undertaken by Octopus Group, on behalf of ION, its international group of comms agencies that use local country experts with global mind-sets to make brands authentic in every market.



THE GLOBAL PICTURE



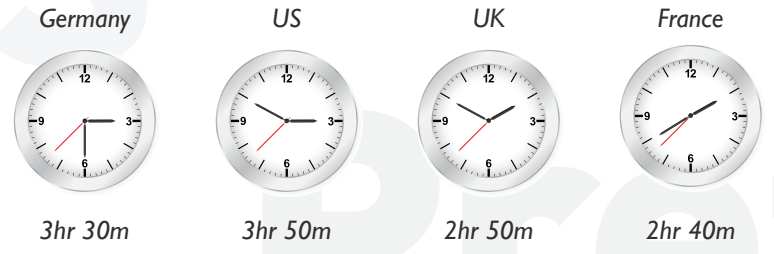
COMMS PREFERENCES



HUNTER-GATHERERS

Over a quarter of global CIOs (27%) spend less than one hour a week researching IT products and services, however, 68% still like to gather as much information as possible before making a purchase.

The average time spent tracking industry news and other developments is 3 hours and 10 minutes a week, with German (3h 30m) and US (3h 50m) CIOs dedicating more time to this than those in the UK (2h 50m) and France (2h 40m).

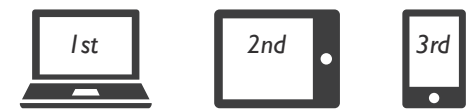


Driven by a desire to make the most of the time they allocate to researching IT products, services and suppliers, CIOs like their information served short, succinct and to the point. 80% said they prefer news stories in IT publications to be no more than 150 words, with one in five (21%) preferring content with no more than a headline. UK CIOs have the greatest preference for headlines only – 29% compared to 16% in the US.

MOBILE INVESTMENT

The laptop is the device of choice for almost half (49%) of all CIOs, rising to 58% in France. Tablets are the second option for 44% of CIOs – in France this figure drops to 26%, but is much higher in Germany (56%).

The smartphone is third most popular, indicating a global trend for sourcing information on the move, and a clear need for mobile optimisation of content.



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OLD VS. NEW

Online search clearly has an influence as part of the communications mix. 95% of global CIOs use this tool when looking to make an IT purchase and three quarters (73%) search online for a specific product or service. This information is more frequently searched than a tech company's name (46%) or business problem (33%). US CIOs (51%) are however most likely to search by supplier name, compared to French CIOs (37%) who search by brand the least.

Over a quarter (27%) of all CIOs consult social media as part of their purchase decision making, but it is still events (36%), industry analysts (35%) and tech company sites (34%) that they turn to first. In the US and France, 42% of CIOs respectively are most influenced by IT events, and 48% of French CIOs are influenced by analysts.

It remains the case that tech marketers need an integrated strategy to satisfy CIOs' varied demands and preferences, avoiding placing too much emphasis on much-hyped social media networks at the expense of other tactics.



JARGON AND BUZZWORDS

CIOs DISLIKE - 38%
IN FRANCE - 44%
IN GERMANY - 34%

VALUE OF TRUST

The most important attributes and characteristics CIOs look for in a tech company include: providing value for money (73%), engendering trust (61%) and having a strong reputation (54%). In France, however, trust was ranked much lower – 45% compared to 68% in Germany.

On the whole, global CIOs (62%) want more relevant content, with French CIOs (68%) crying out the most for better targeted information, compared with Germany (59%) who are least concerned.

A major bugbear is jargon and industry buzzwords, which over a third (38%) of CIOs dislike. 44% in France are frustrated with jargon compared to 34% in Germany.

Many tech brands are getting the balance right, however, with half (52%) of CIOs valuing suppliers who publish their own content over those that don't.

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BOARD LEVEL INVOLVEMENT

As IT purchasing decisions become more important within businesses, responsibility for making them is no longer the sole domain of the IT department. The wider board is becoming more and more involved in the way funds are spent with almost three quarters (71%) of CIOs reporting board involvement to a great (30%) or some (41%) extent.

In Germany, this is particularly true with almost nine in 10 (88%) of CIOs' boards involved in the major purchases they're intending to make. In the US, the figure is just over half (53%).

We know that tech decisions are moving away from the IT department, with the rise of the enterprise app store and self-service technology, and the increase in external influence, as seen here with the board, is part of this wider trend.

The roles of the CIO, and CMO are colliding, with the rapid growth of tools like marketing automation making everyone an IT decision maker.



**The message is simple:
content needs to appeal to both technical
and non-technical audiences**

For tech marketers, the message is simple: content needs to appeal to both technical and non-technical audiences to register and make the desired impact.

Communication strategies must consider the changing role of the CIO, who is more likely to be influenced by non-technical content, that helps sell the benefits of IT to the wider business.

CIO PERSONALITY

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THE EMERGENCE OF A NEW GENERATION

Globally a clear picture has emerged from Tech Heads 2013 of a new breed of CIO who is bold, entrepreneurial and an advocate of change.

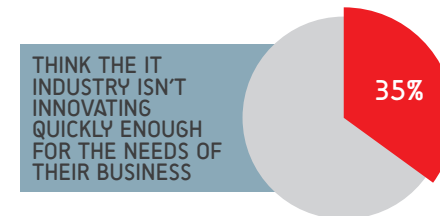
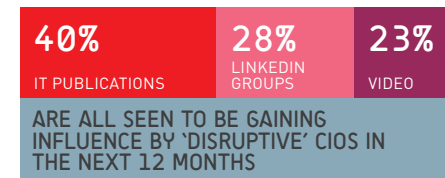
We have dubbed this individual the 'disruptive' CIO, with 41% falling into this category – most notably in France (46%), compared to 42% in Germany, 39% in the US and 37% in the UK - who are all looking for new and innovative approaches to IT, which go against the status quo. The other 59% are 'retro' in their style, only adopting 'tried and proven' techniques.

'Disruptive' CIOs tend to be more open to a wider range of content from IT suppliers. In the next 12 months, IT publications (40%), LinkedIn Groups (28%) and video (23%) are all seen to be gaining influence by 'disruptive' CIOs.

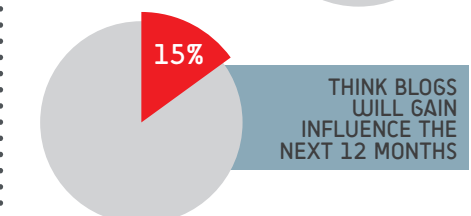
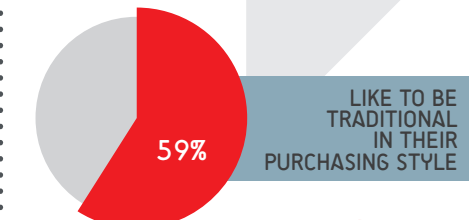
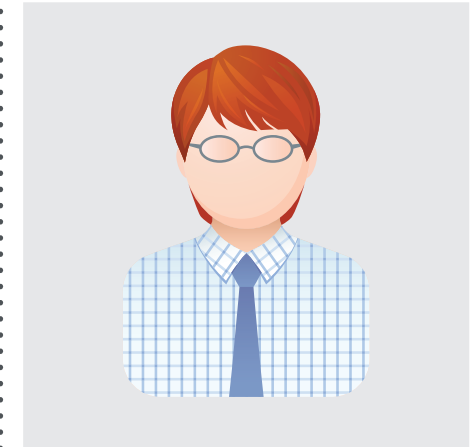


'Disruptive' CIOs tend to be more open to a wider range of information from IT suppliers

DISRUPTIVE



TRADITIONAL



GLOBAL COMMS SUCCESS

A global comms strategy needs to tailor content and approaches based on the **location of the CIO**. Tech Heads 2013 demonstrates how cultural differences play a part in influencing CIOs and their purchasing decisions.

CIOs in France, for example, spend the least amount of time tracking technology news, products and services, and have the highest percentage of CIOs that describe their style as 'disruptive', compared to their global counterparts.

However, CIOs are united in their demand for information to be clear and concise and this needs to underpin any communications strategy, regardless of the market that is being targeted.

Having a comms strategy, **tested from the ground up**, is not the only consideration – with increasing board influence on IT decisions, tech brands need to consider which additional stakeholders they need to target. Messages that influences a technical and non-technical audience will enable tech leaders to engage all those who have the ability to purchase technology.

But, above all – global plans need to take into consideration the distinct needs of each audience – what works in the US doesn't work in France, so comms campaigns must be created locally, rather than driven from a global perspective. In-country experts, with their ear to the ground and ability to think laterally, will win over those companies that don't consider country-specific needs.

This new audience is looking to
more sources to influence
their decision making



UK SPOTLIGHT

A GAME OF CHANGE

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COMMS PREFERENCES

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TIME IS OF THE ESSENCE

The British CIO allocates on average 31 minutes a day to researching and consuming the information they rely on to make IT purchasing decisions. Although 20 minutes less than the global average, it still equates to a significant amount of time and opportunity for tech brands.

Brevity is king when it comes to the impact of news articles. 84% of CIOs like content in 150 words or less. 29% want to look at a headline only compared to 22% in 2012. A third (33%) are happy with a short 50-word summary and one in five (20%) are content with a short 150-word article.

In terms of the devices they use to research and read information, the tablet (48%) edges laptops (47%) into a close second place, with smartphones favoured by over a third (37%) and desktop PCs just under a third (32%).

DEVICE PREFERENCE	2012	VS	2013
LAPTOPS	65%	:	47%
DESKTOPS	54%	:	32%
SMARTPHONES	49%	:	37%
TABLETS	36%	:	48%

RELEVANCE IS KING

It's not just time that is of the essence, however, IT decision makers are crying out for bespoke content to help them make better decisions. Almost two thirds (60%) say IT companies must make content more relevant to them and their situation to gain influence.

UK CIOs give a big thumbs down to badly written articles (57%), stories that lack clarity (48%), are overly complex (42%), use too much jargon (40%), are too long (36%) or whose content isn't engaging (35%).

However they appreciate content direct from the source – 55% said they value tech leaders who publish their own content, over those that don't.



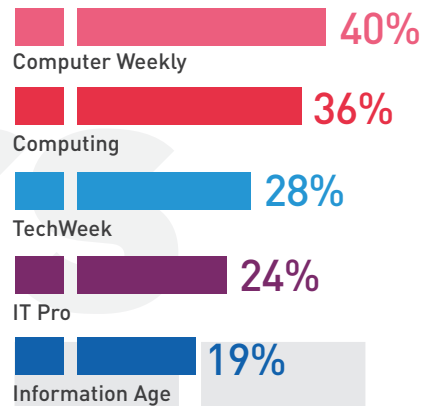
TRADITIONAL TACTICS RULE

The trend towards using conventional tactics to gain influence such as events, IT publications, analyst engagement and tech company websites, which we uncovered in Tech Heads 2012, appears to be true again this year.

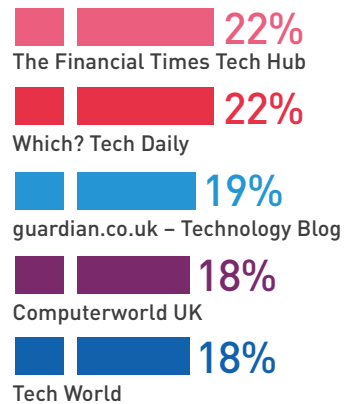
The most influential publications for the second year running are IT stalwarts, Computer Weekly (40%) and Computing (36%), attracting far higher scores than the best read technology blogs, such as the FT (22%) and The Guardian (19%).

MOST INFLUENTIAL...

TECH PUBLICATIONS



ONLINE BLOGS



The trend towards using conventional tactics to gain influence appears to be true again this year

RESEARCHING IT SUPPLIERS



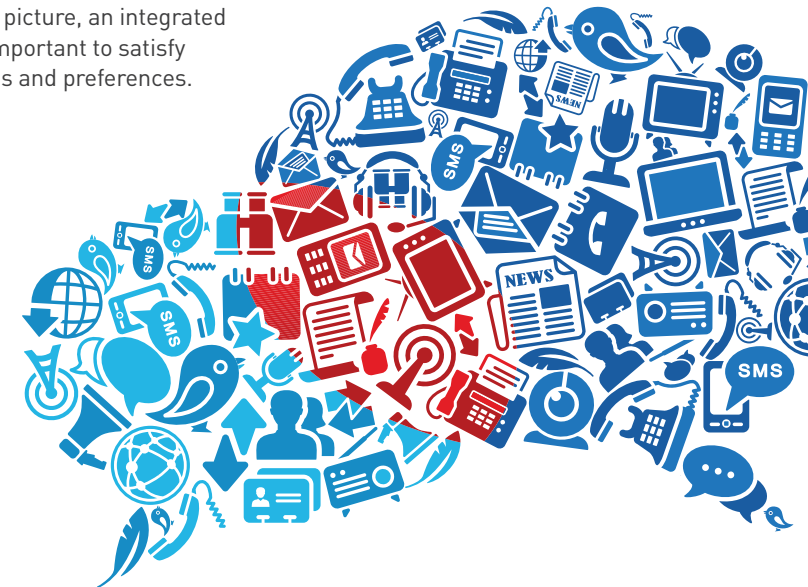
SOCIAL GAINS GROUND

Social is gaining ground amongst CIOs this year, with almost a third (30%) researching IT suppliers through LinkedIn before making a purchase. Google+ is used by 30% of UK CIOs, followed by Facebook (20%) and YouTube (19%).

Similar to the global picture, an integrated comms strategy is important to satisfy CIOs' varied demands and preferences.

INFLUENCE OF THE BOARD

As well as looking outside their organisations for information and insights, UK CIOs also have internal audiences to engage when making IT investment decisions. Most notably, these stakeholders are the board, with 82% of company board level execs involved in IT decision making to some extent. Reflective of the global mood – tech marketers need to appeal to a wider audience – than just the CIO.



CIO PERSONALITY

20-21

GREATER SPREAD OF COMMS SOURCES

Just behind the US, UK 'disruptive' CIOs are driving the demand for a greater spread of comms sources to gather information about IT products and services in the next 12 months. 40% will be influenced by friends / associates also working as IT professionals, 44% IT conferences, 39% trade conferences.

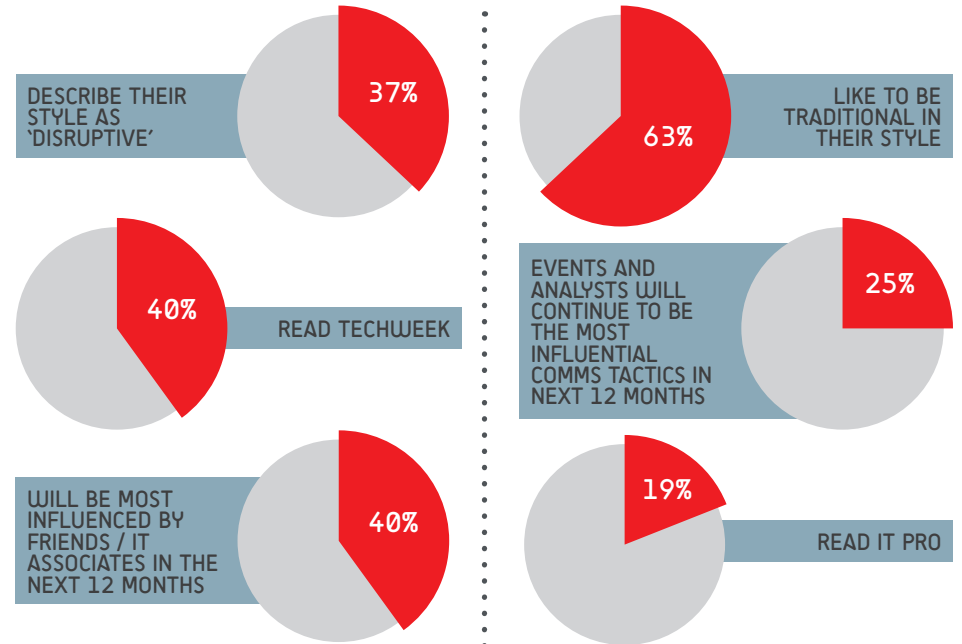
TRUST AND EXPERIENCE PREFERRED

Most CIOs (63%) are still 'retro' when it comes to their approach to IT strategy, opting for established suppliers (73%) over technology innovators and start-ups (27%).

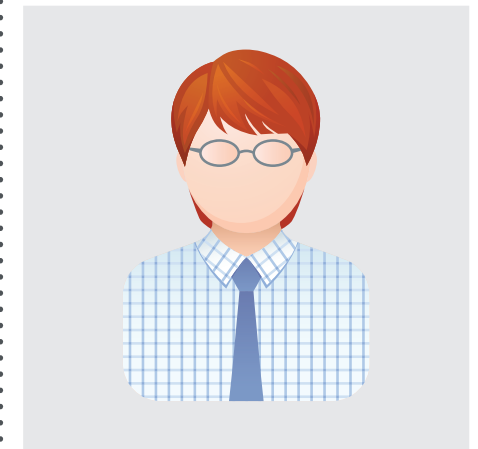


The majority of CIOs are still 'retro' in their approach to IT

Over a third of UK CIOs (37%), however, describe their style as 'disruptive', indicating a willingness to experiment and try new solutions to meet their organisation's business needs. Unsurprisingly, when this breed of CIOs turn to the IT supplier community for ideas and solutions, many are disappointed: almost a third (29%) don't think the industry is innovating quickly enough.



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UK COMMS CONSIDERATIONS

This year's Tech Heads confirms what we are seeing from a comms perspective – greater uptake of **integrated services** that work alongside each other for improved impact.

And the CIO community is definitely on board with this – with increased pressure and less time – this group wants smart, simple and targeted comms that make decisions about IT purchases easier.

As comms professionals, we are in the grips of **big data**, which is probably the biggest threat and opportunity our industry faces. Our insight team has always been the cornerstone of our campaigns, but we're seeing increased interest for analytics, research and audience segmentation, which fits perfectly with the CIO's desire for more bespoke comms. Authenticity is key and brands need to make themselves more personal and relevant – tapping into emotional, as well as practical drivers.

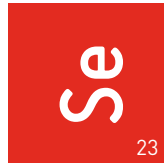
Having one eye on the future and spotting the next PR or marketing trend is absolutely critical to success. In just 12 months we've seen a shift from the 'retro CIO' towards an avant-garde IT decision maker. Having in-depth knowledge of how to influence this 'disruptive CIO', faster than any of the competition, could mean the difference between a sale or lost opportunity.

Tech innovation is changing the way businesses consume IT and therefore how it needs to be marketed. The successful campaigns of the future will appeal to both CIOs and CMOs.

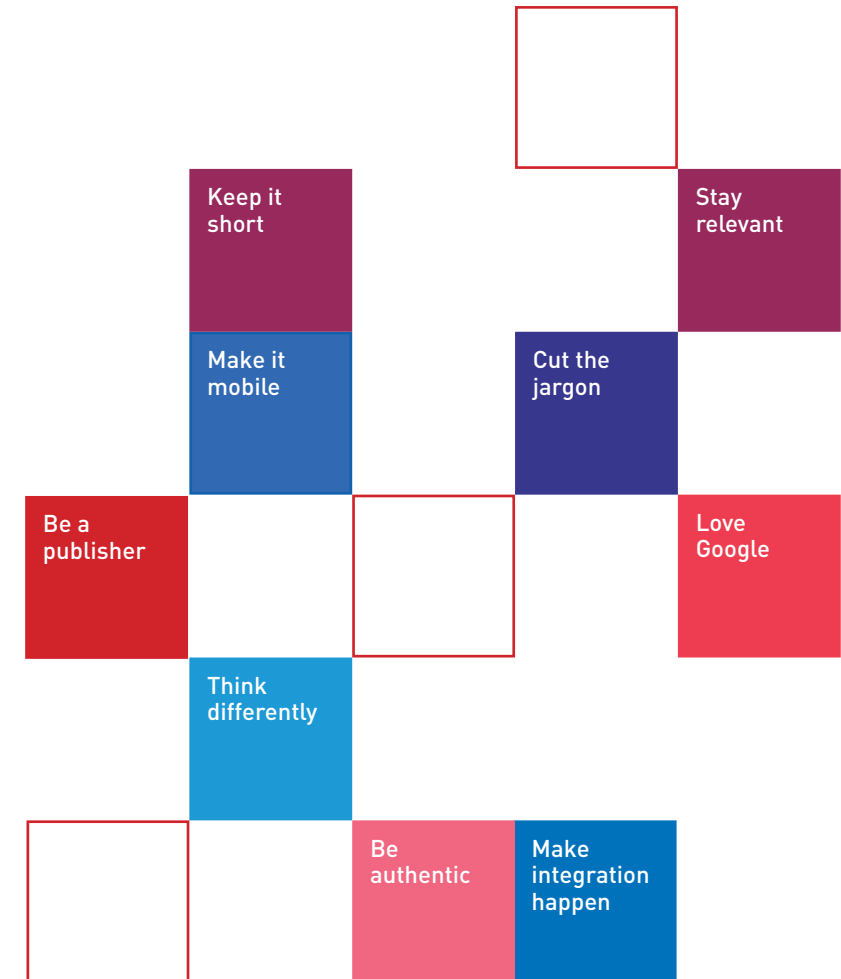


We are in the grips of big data, which is probably the biggest threat and opportunity that our industry faces

THE 20-COND DROP



TO TRULY GAIN INFLUENCE WITH THIS GROUP, A TARGETED, WELL THOUGHT THROUGH COMMS PROGRAMME AND ONE THAT IS BUILT AROUND SOME GOLDEN RULES IS NEEDED:



tive CIO

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TECH HEADS