



GARDNER  
RESEARCH

2015

# MEDIA USAGE

IN MANUFACTURING

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MARKETING STRATEGY,  
SURVEY RESULTS  
AND BUYER ANALYSIS

# 2015 MEDIA USAGE IN MANUFACTURING

MARKETING STRATEGY,  
SURVEY RESULTS  
AND BUYER ANALYSIS



## MARKETS

Automotive / Metalworking / Plastics  
Composites / Finishing

## MEDIA

Trade Magazines / E-Newsletters / Industry Websites  
Tradeshows / Webinars / Blogs / Social Networks

## PEOPLE

Owners / Executives / Managers / Engineers  
Machinists / Designers / Sales / Educator

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## METHODOLOGY

The survey group of 2,288 respondents was mainly comprised of managers and engineers serving durable goods manufacturing industries. The survey was opened from December 4, 2014 to January 4, 2015. More than 92% of the survey group indicated they are directly involved in the purchase of machinery, software, hardware, materials or tooling. Here we seek to provide an overview of media use in manufacturing and what that means for marketing professionals targeting this group. Additionally, the survey results directly address vendor selection, lead acquisition and contact preferences amongst manufacturing professionals.

## INTRODUCTION

Now in its fifth year, the results of our annual media survey reveal the demographic characteristics and media usage trends of today's manufacturing technology buyer. To assist in expanding the survey's insights deeper into the industrial sales cycle, we expanded the survey to include questions on vendor selection, lead nurturing and content preferences.



# KEY FINDINGS FROM THE 2015 MEDIA SURVEY

## BRAND

Regardless of media channel, brand is the most influential factor impacting media usage and vendor selection. Industrial buyers rely on sources and suppliers that they recognize and trust. The influence of brand is most apparent when buyers review search results, select vendors and conduct research.



### BUYING CYCLE

PAGES 6-7, 13

- The majority of manufacturing purchases (64%) are influenced by at least 3 people
- Nearly 70% look for products or services at least once a week



### MEDIA

PAGES 12-14

- Websites and trade magazines are the two most accessed and effective information resources for manufacturing professionals
- Trade magazines remain the leading push media



### SEARCH

PAGE 15

- Manufacturers are significantly more likely to select search returns featuring brands they recognize (93%) to brands they are not familiar with (31%)
- When reviewing search engine returns, manufacturing professionals favor technical articles and known brands over images, ads and videos.



### MOBILE

PAGE 16-17

- Most manufacturing technology buyers travel less than once a month (65%); nearly 20% indicated that they don't travel at all for work
- Overall mobile adoption is relatively flat, but significant gains appear in laptop and tablet usage; primary tablet use is email



### SOCIAL MEDIA

PAGE 18-19

- Social media adoption has increased for the fourth consecutive year
- Overall perception of social media as a business tool remained flat with a below average rating of 2.64
- LinkedIn and YouTube continue to be the most useful social media sites for manufacturing buyers



### VENDOR SELECTION

PAGE 20-22

- In line with media usage reports, manufacturers that made a capital equipment purchase last year relied most heavily on trade media, supplier sites and events
- The most influential criteria impacting a buyer's selection of a potential vendor is technology followed closely by service and reputation
- While registration based media ranks lower on accessibility and effectiveness, it is a primary means for buyers to reveal their purchasing interests



# INDUSTRIAL EQUIPMENT BUYING CYCLE

**BRAND IMPRESSION** is the single most important factor impacting the manufacturing buying cycle

**PRODUCT PURCHASE**

**PUSH MEDIA** Build brand identity early with PUSH MEDIA

**PUSH MEDIA** Introduces prospects to information and products they do not know they need.

**PULL MEDIA** Support brand and harvest its benefits in PULL MEDIA

**PULL MEDIA** Provides prospects with information they know they need, but are not sure where to find it.

STAGES

## AWARENESS

The market actively consumes push media to learn about things they did not know.

## RESEARCH

This market segment knows they have an interest in certain topics and technologies to act upon in the future.

## CONSIDERATION

Prospects have immediate requirements, and are actively seeking solutions.

## VENDOR SELECTION

Final comparison of known alternatives.

INFLUENCERS

**PUSH MEDIA** is the best means to introduce new products and establish brand, which is essential in the later stages of the buying process.

- TRADE MAGAZINES
- E-NEWSLETTERS

**PUSH MEDIA** still dominates, but the segment is more focused.

- TRADE MAGAZINES
- E-NEWSLETTERS
- INDUSTRY WEBSITES
- TRADESHOWS
- WEBINARS
- BLOGS

With the prospect now in control of the information gathering process, **PULL MEDIA** becomes most important. Brand is a primary influence on where and at whom they look.

- SEARCH ENGINES
- INDUSTRY WEBSITES
- SUPPLIER WEBSITES
- WEBINARS
- SOCIAL NETWORKS
- BLOGS

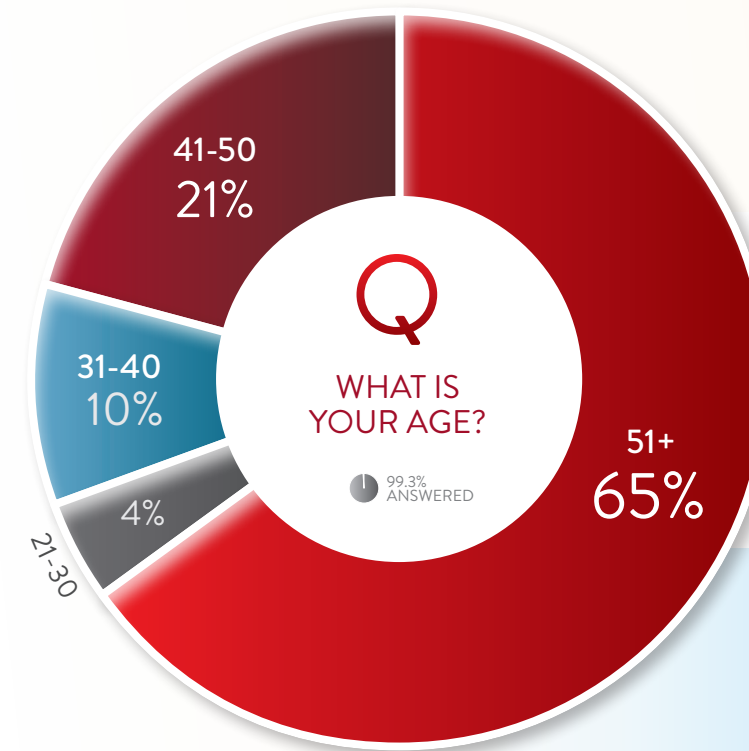
At the final buying cycle stage, prospects weigh who can best solve and service a problem. As a result, the impression of your brand's technology, reputation and service are primary influencers.

- INDUSTRY WEBSITES
- SUPPLIER WEBSITES
- SOCIAL NETWORKS



# THE MANUFACTURING BUYER

- Is an influential member of senior company management
- Is part of a team of 3 or more who impact purchasing decisions
- Looks for products and services at least once a week
- Uses at least 5 different media to find information
- Travels less than once a month
- Values technology and service more than cost
- Carries a mobile device; primarily for email
- Does not consider social media an effective business tool



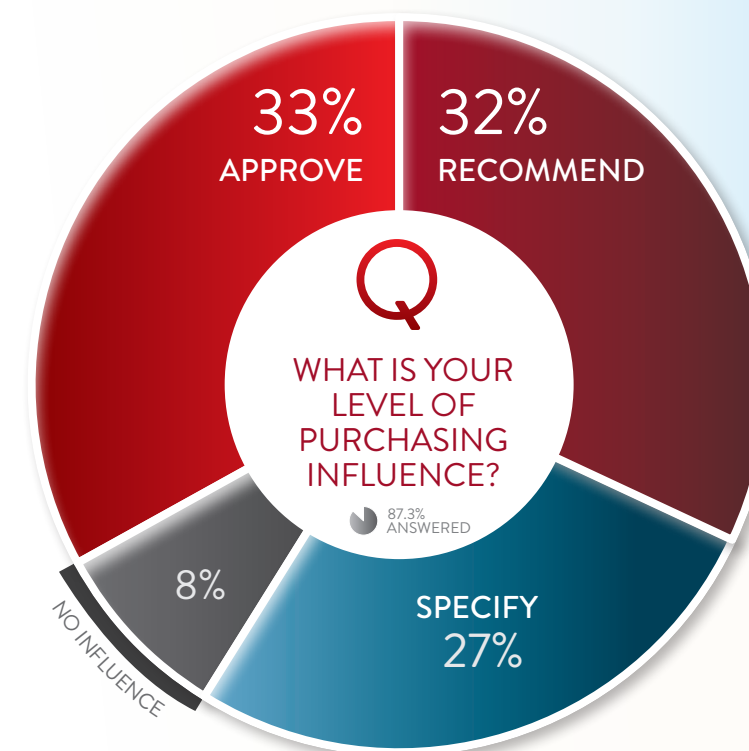
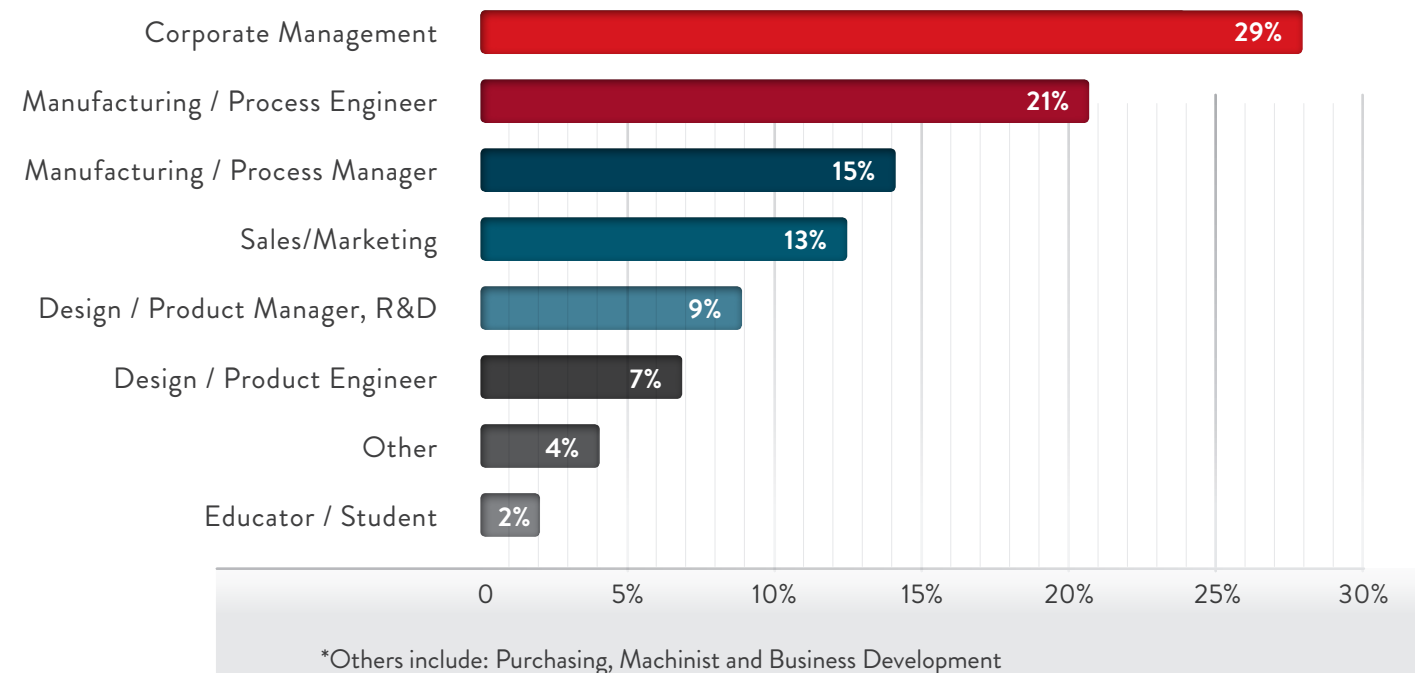
Results show that Manufacturing professionals aged 41+ represent twice the approval authority of their younger colleagues.

### AGE & INFLUENCE:

Senior manufacturing professionals are still the primary drivers in influencing and approving manufacturing technology purchases. These professionals rely heavily on known, trusted sources. Specifically, trade media outlets (both in print and online) and recognized, valued brands that they consider leaders in providing technology and quality.

92% Have Purchasing Influence

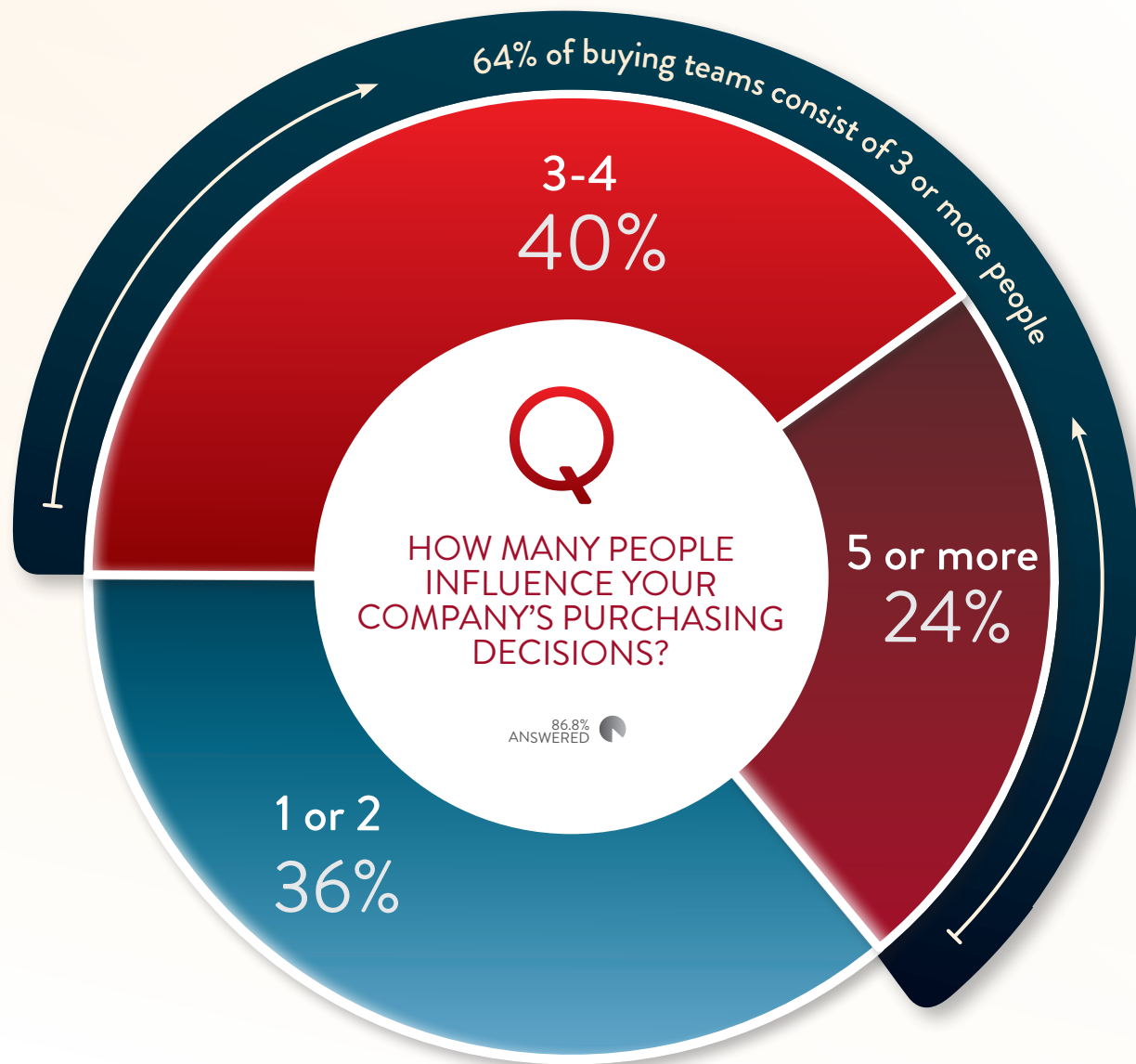
## WHAT IS YOUR JOB FUNCTION? 99% ANSWERED





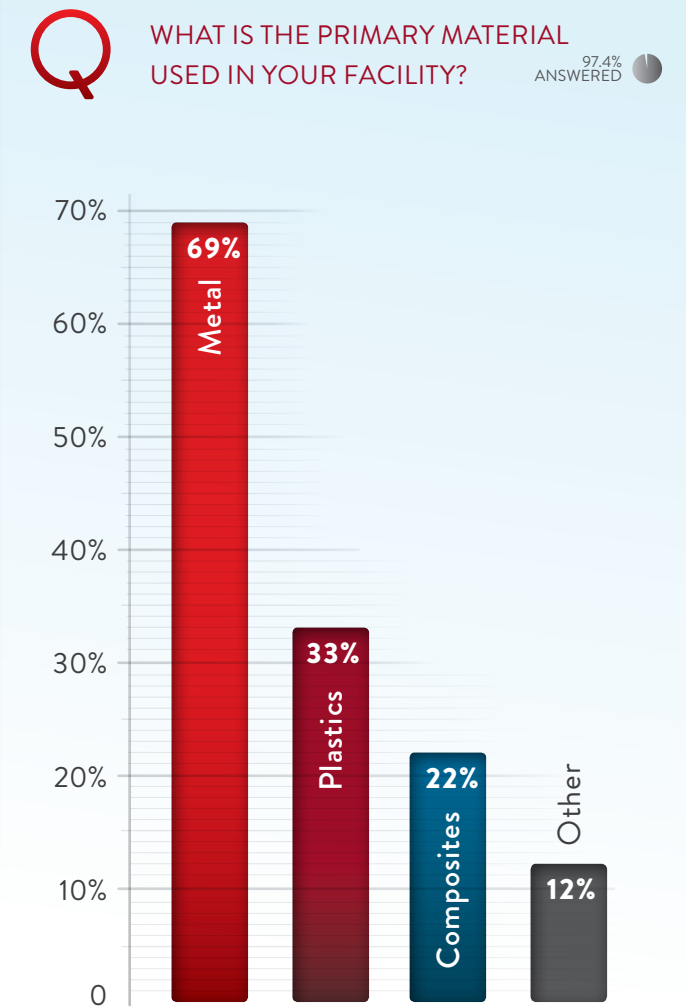
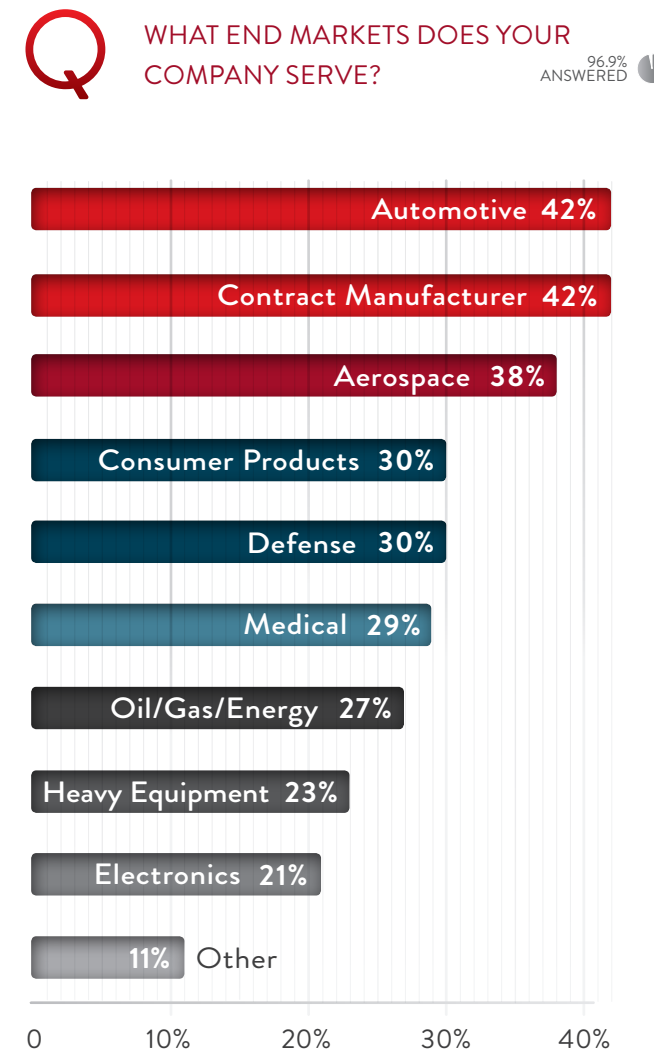
# BRAND & THE BUYING TEAM

As the size of buying teams and number of influencers continues to both increase and also include multiple generations and multiple departments, it becomes increasingly more important to present your marketing message and your brands across channels and episodes that impact the buying process.



# MANUFACTURING COMPANIES

While there are clear end markets and materials leading the industrial manufacturing landscape, it's important to note that contract manufacturers represent the largest responding group. Additionally, more than 30% of survey respondents indicated using multiple materials at their facility.

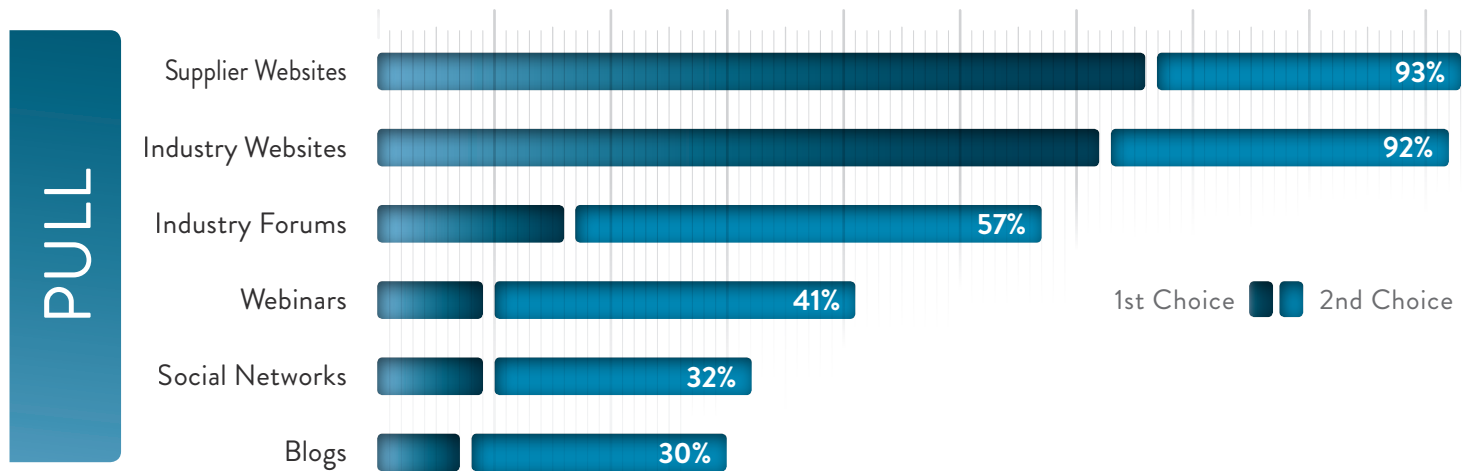
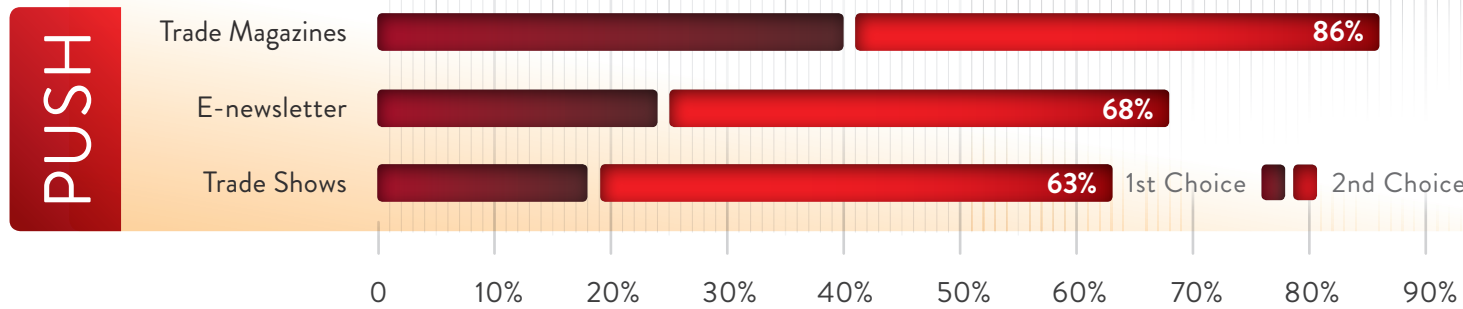




# TRADE MEDIA

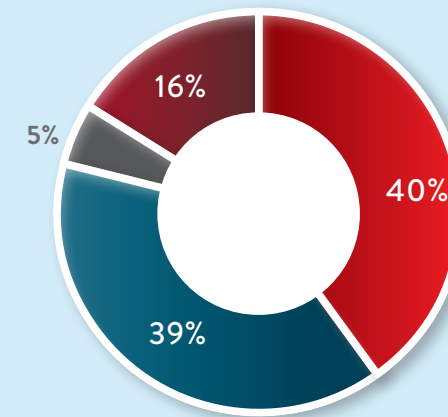
Whether in print, online or in person, manufacturing technology buyers rely on trade media as a source for industry information. Our research shows that they place the highest value on solutions-based, applications stories or information on new product or process technologies.

**PLEASE RANK THESE MEDIA IN TERMS OF EFFECTIVENESS FOR FINDING INFORMATION.** 93.1% ANSWERED



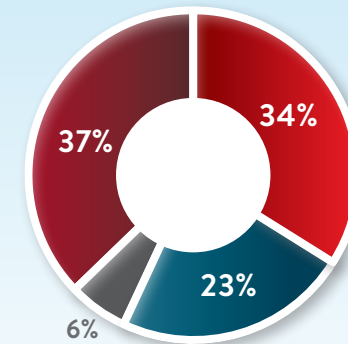
**HOW OFTEN DO YOU LOOK FOR INFORMATION?** 93% ANSWERED

PROCESS TECHNOLOGY AND BEST PRACTICES

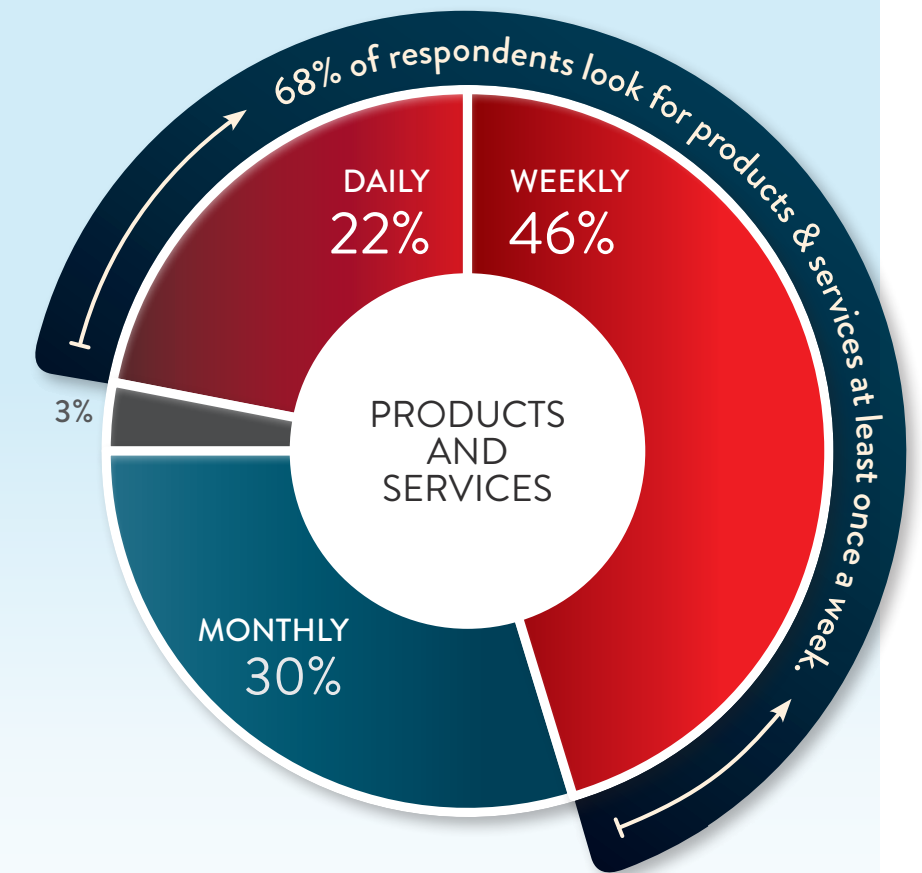
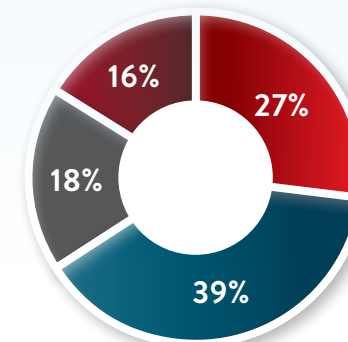


FREQUENCY  
Daily  
Weekly  
Monthly  
Never

NEWS AND EVENTS



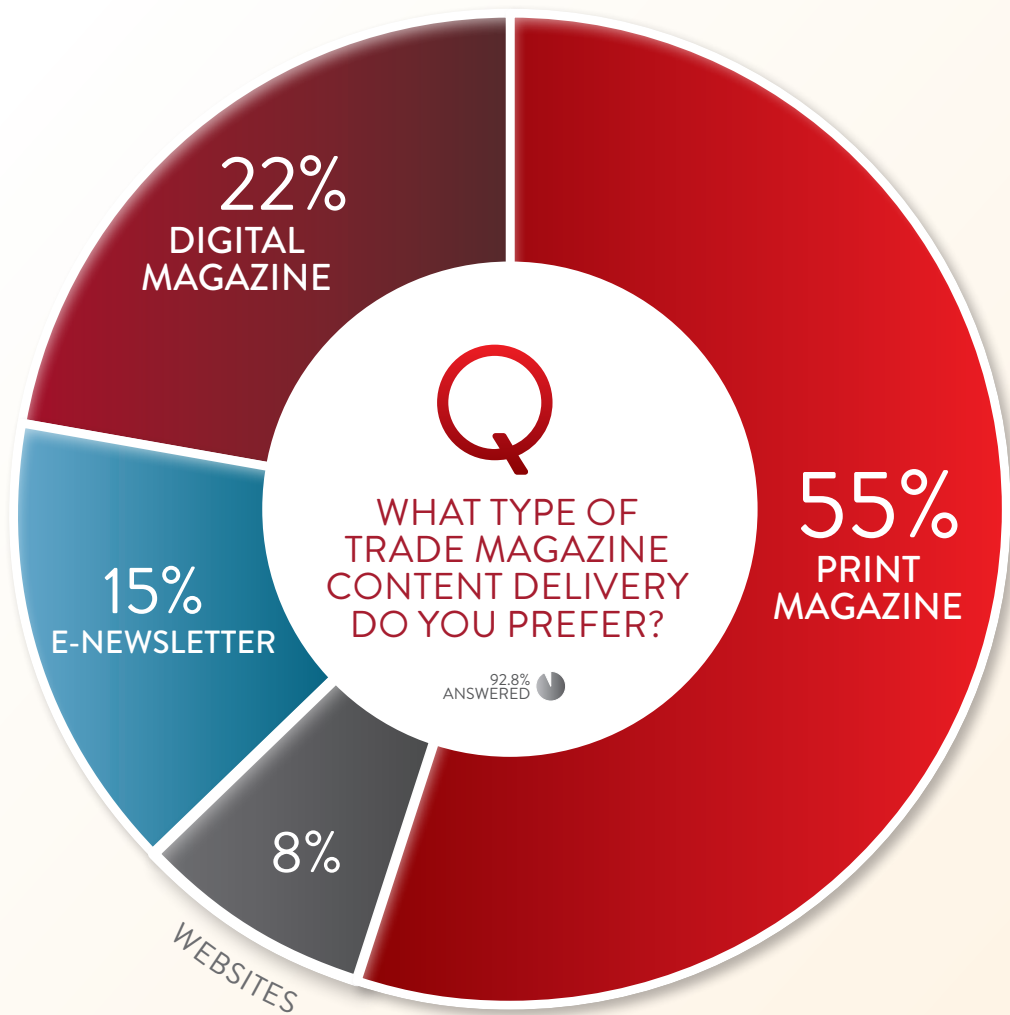
BUSINESS AND MARKET DATA





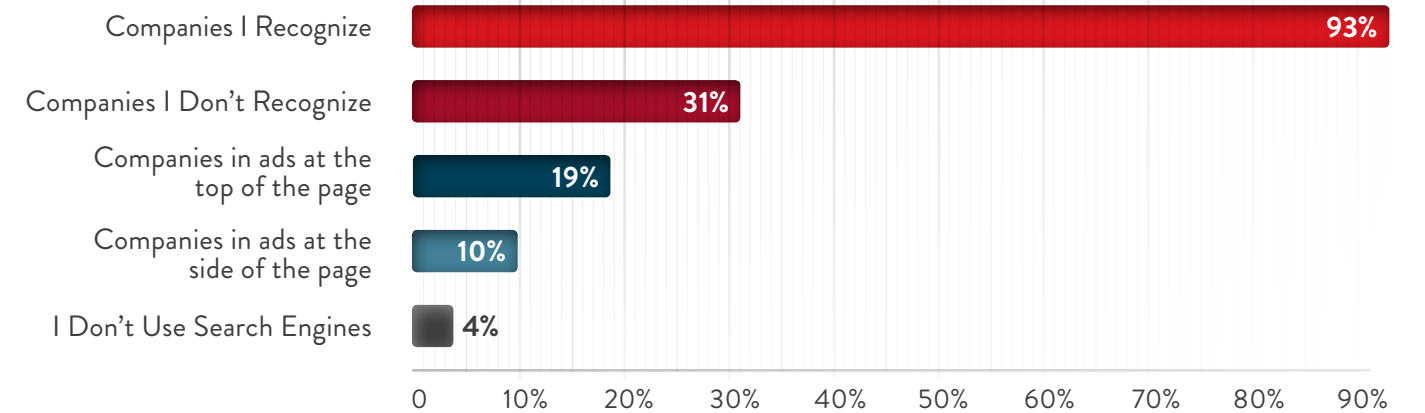
# BRAND & SEARCH

Investments in search engine market and search engine optimization are important. But, research shows that industrial manufacturers are much more likely to select search results from companies and sources they already know or recognize. As a result, an investment in developing brand recognition and brand reputation should be the foundation of both your search strategy and of your overall integrated marketing strategy.



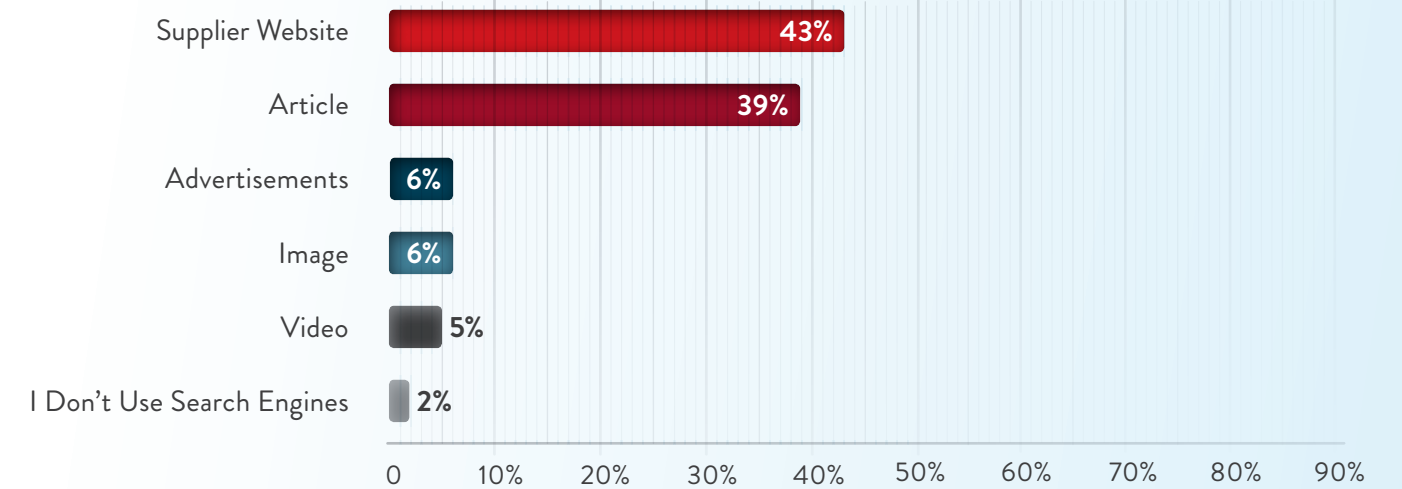
## WHICH SEARCH RESULTS DO YOU SELECT?

91.5% ANSWERED



## WHAT TYPES OF RESULTS ARE YOU MOST LIKELY TO SELECT?

91.5% ANSWERED

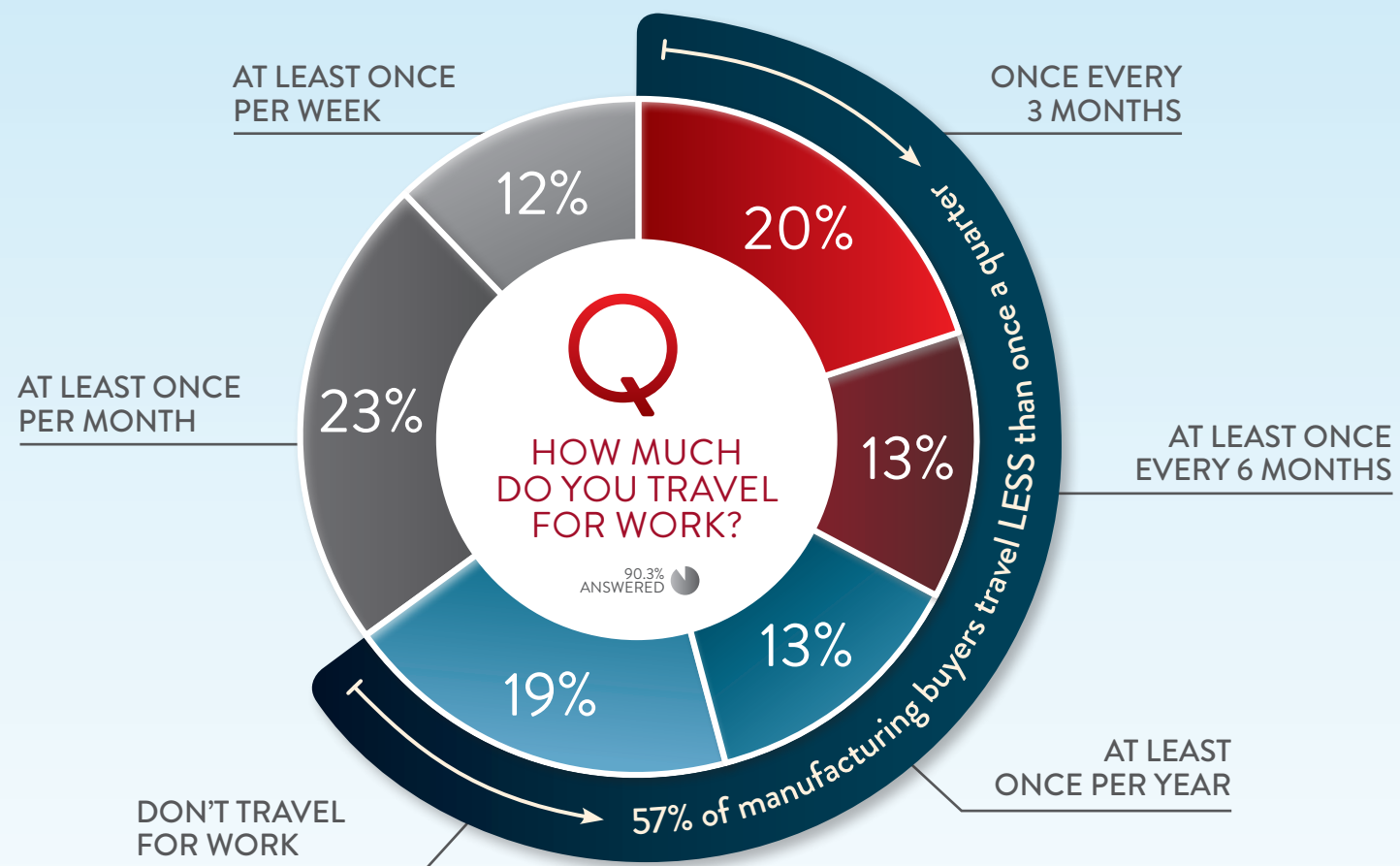






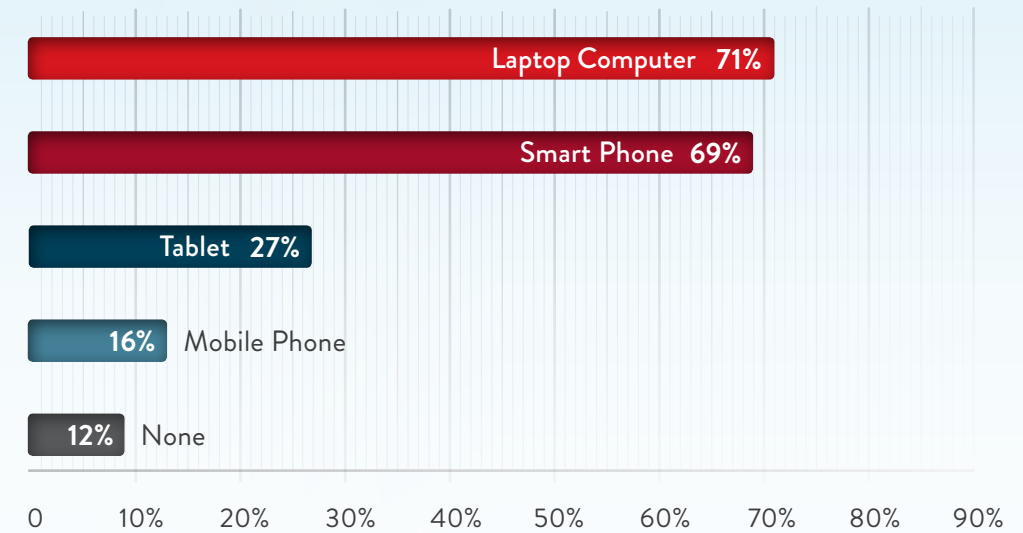
# MOBILE DEVICES

Marketers need to be involved in ensuring their content is available digitally and that their message is present and optimized for consumption in places where technology buyers visit when online or the on-the-go. Specifically, while buyers tend to travel infrequently, they do frequently reference industry and supplier websites to find information. When using mobile devices, buyers are most likely checking email, viewing general industry information or researching products or processes. Additionally, industrial marketers should be communicating with customers and prospects via permission-based, solutions-oriented, personalized email messaging.



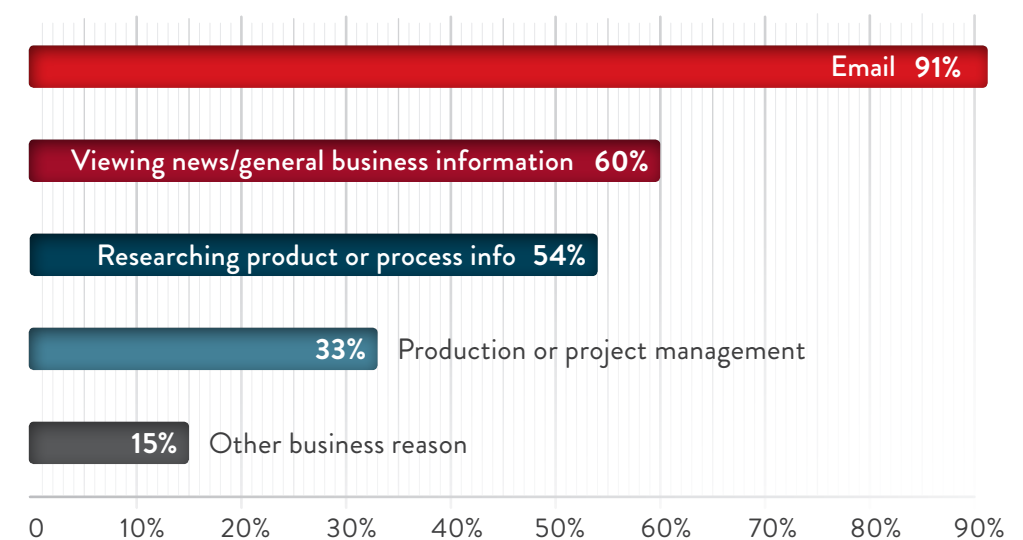
## WHICH MOBILE DEVICES DO YOU USE FOR WORK?

90.5% ANSWERED



## WHAT ARE YOU USING MOBILE DEVICES FOR?

79.8% ANSWERED





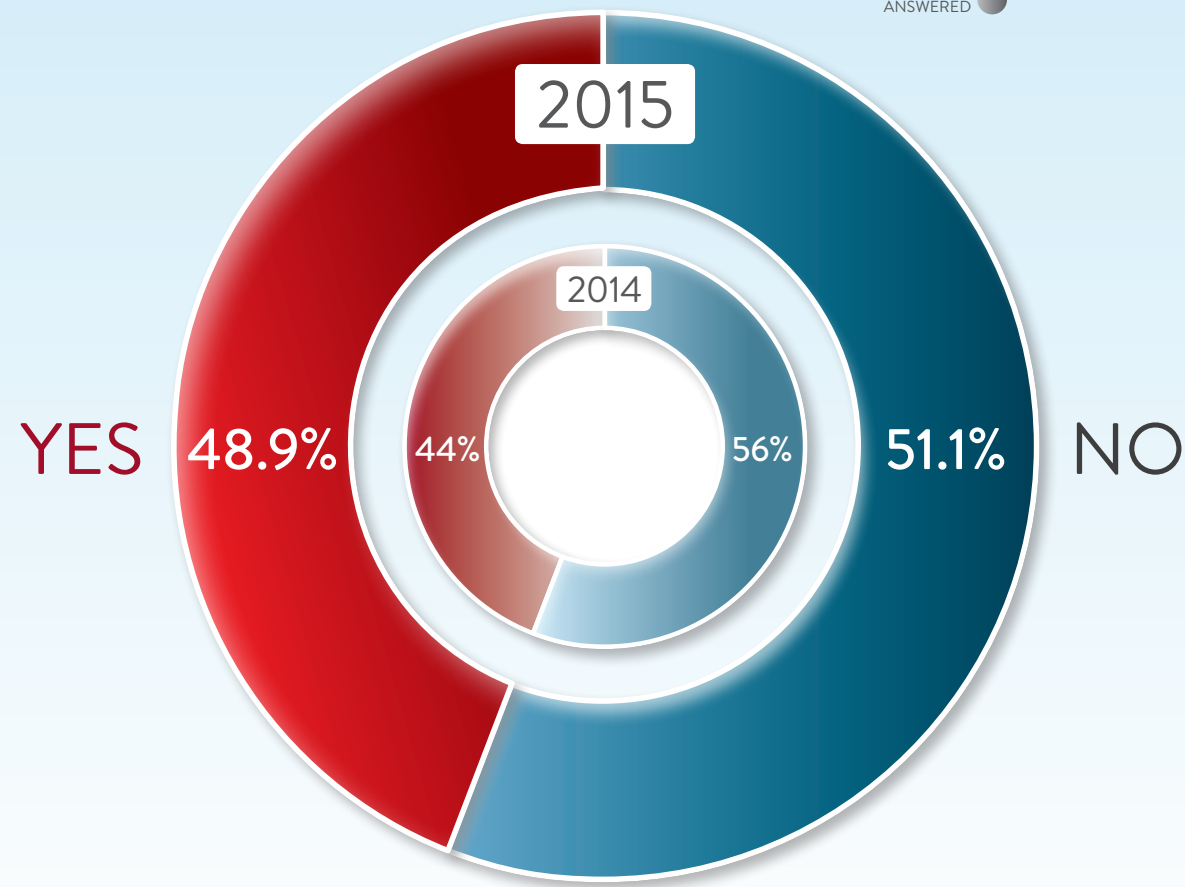
# SOCIAL MEDIA

Social media should be a part of any integrated media strategy. However, while adoption has increased, the perception of the media's usefulness has decreased. As a result, industrial marketers should pay particular attention to LinkedIn and YouTube, the two best performing social media sites.



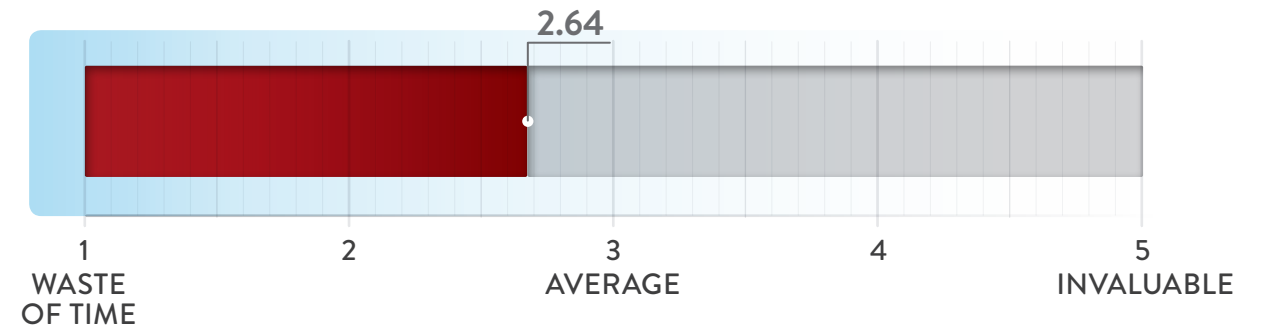
DO YOU USE SOCIAL MEDIA FOR BUSINESS?

90.3% ANSWERED



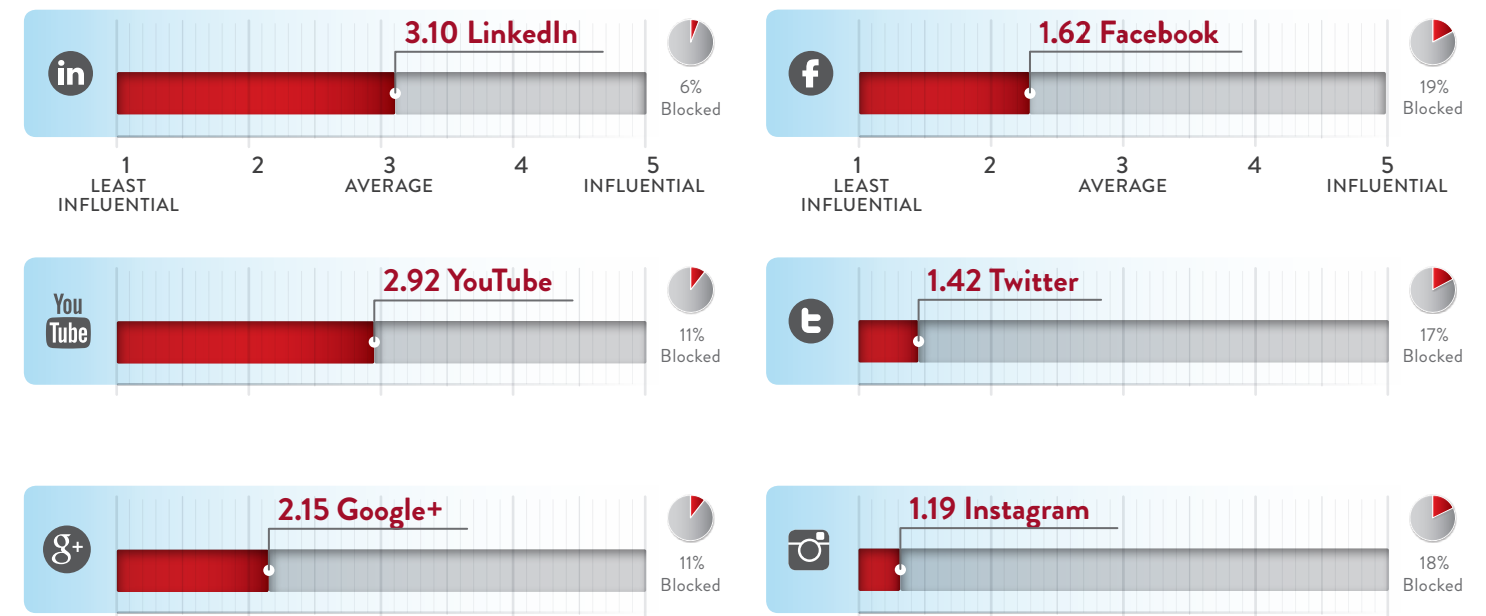
WHAT IS YOUR GENERAL IMPRESSION OF THE USEFULNESS OF SOCIAL MEDIA AS A BUSINESS TOOL, 1 BEING A WASTE OF TIME AND 5 BEING INVALUABLE?

87.9% ANSWERED



ON A SCALE OF 1 TO 5, 1 BEING LEAST INFLUENTIAL AND 5 BEING MOST INFLUENTIAL, RANK THE VALUE OF EACH OF THE FOLLOWING SOCIAL MEDIA SITES.

56.3% ANSWERED



### INFLUENCE RANKING

- 1. Least Influential
- 2. Somewhat Influential
- 3. Average
- 4. Somewhat Influential
- 5. Influential

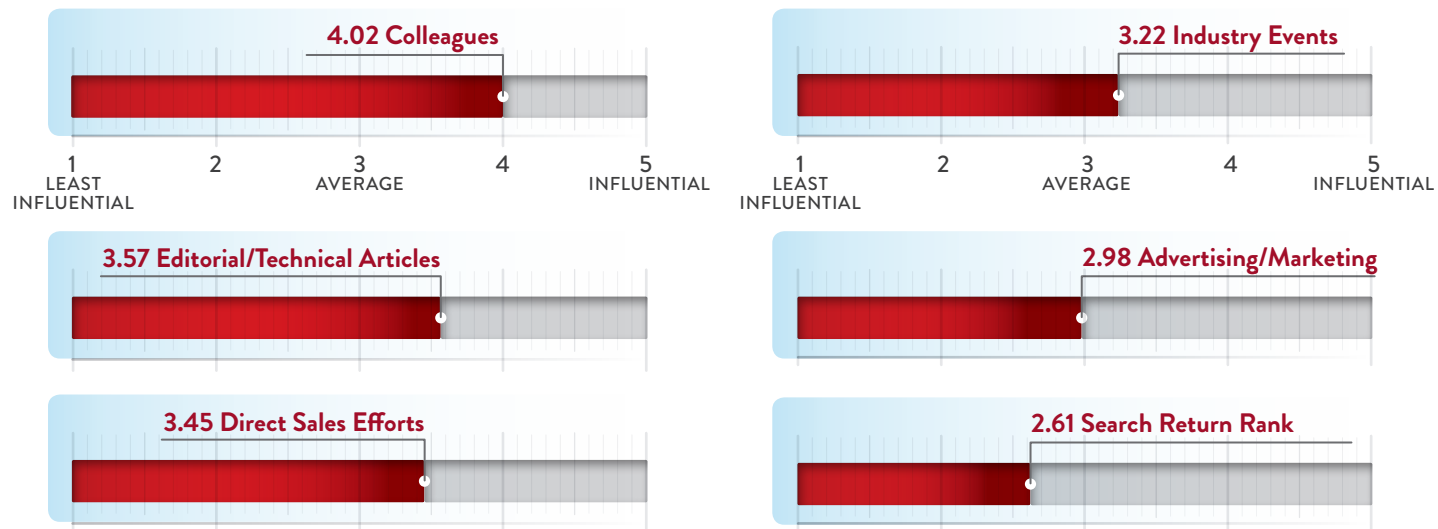


# VENDOR SELECTION

These final questions illustrate the integrated brand building imperative. In the early, perception forming stages of the buying cycle, manufacturing professionals rely most heavily on editorial coverage / technical articles and input from peers and colleagues. Technical coverage develops the perception of your brand's technology and reputation.

**Q** ON A SCALE OF 1 TO 5, 1 BEING LEAST INFLUENTIAL AND 5 BEING MOST INFLUENTIAL, RANK THE FOLLOWING IN FORMING YOUR PERCEPTION OF A VENDOR?

85.5% ANSWERED

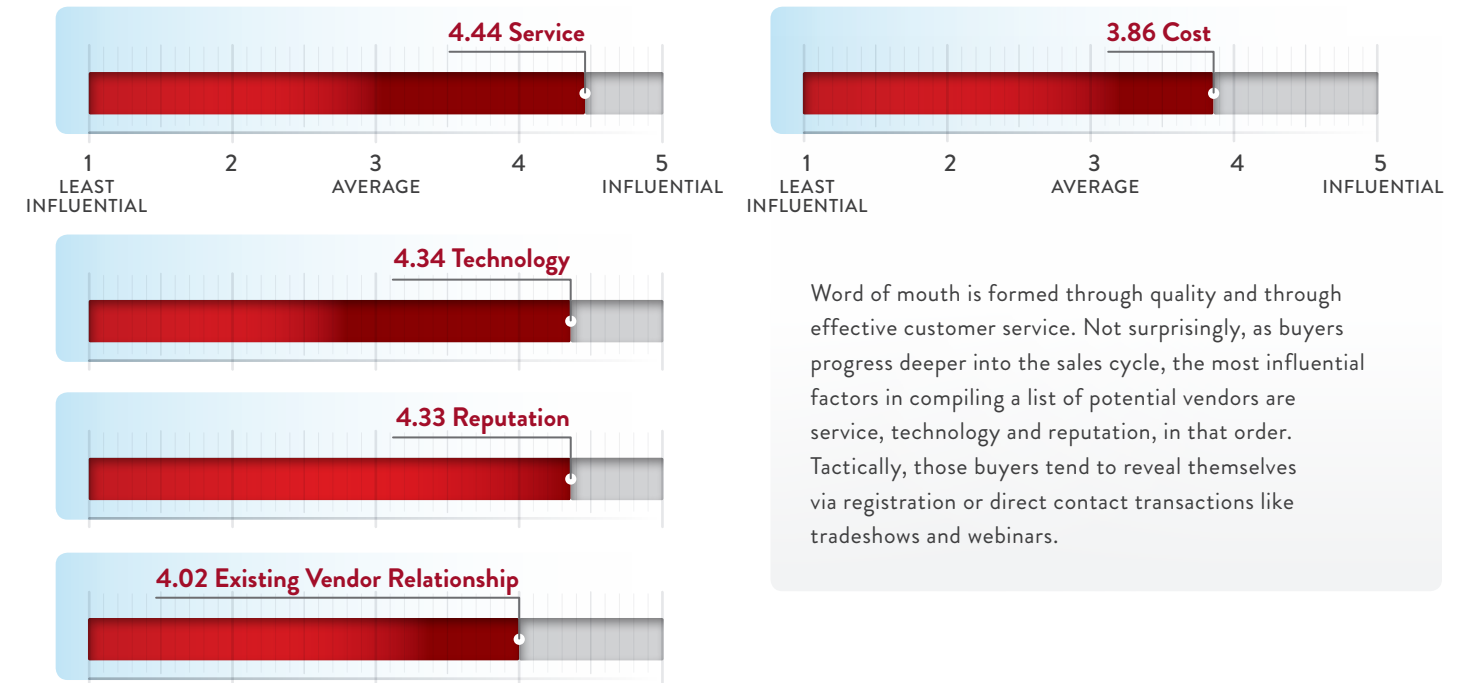


**INFLUENCE RANKING**

1. Least Influential	4. Somewhat Influential
2. Somewhat Influential	5. Influential
3. Average	

**Q** ON A SCALE OF 1 TO 5, 1 BEING LEAST INFLUENTIAL AND 5 BEING MOST INFLUENTIAL, RANK THE FOLLOWING IN SELECTING A LIST OF POTENTIAL VENDORS?

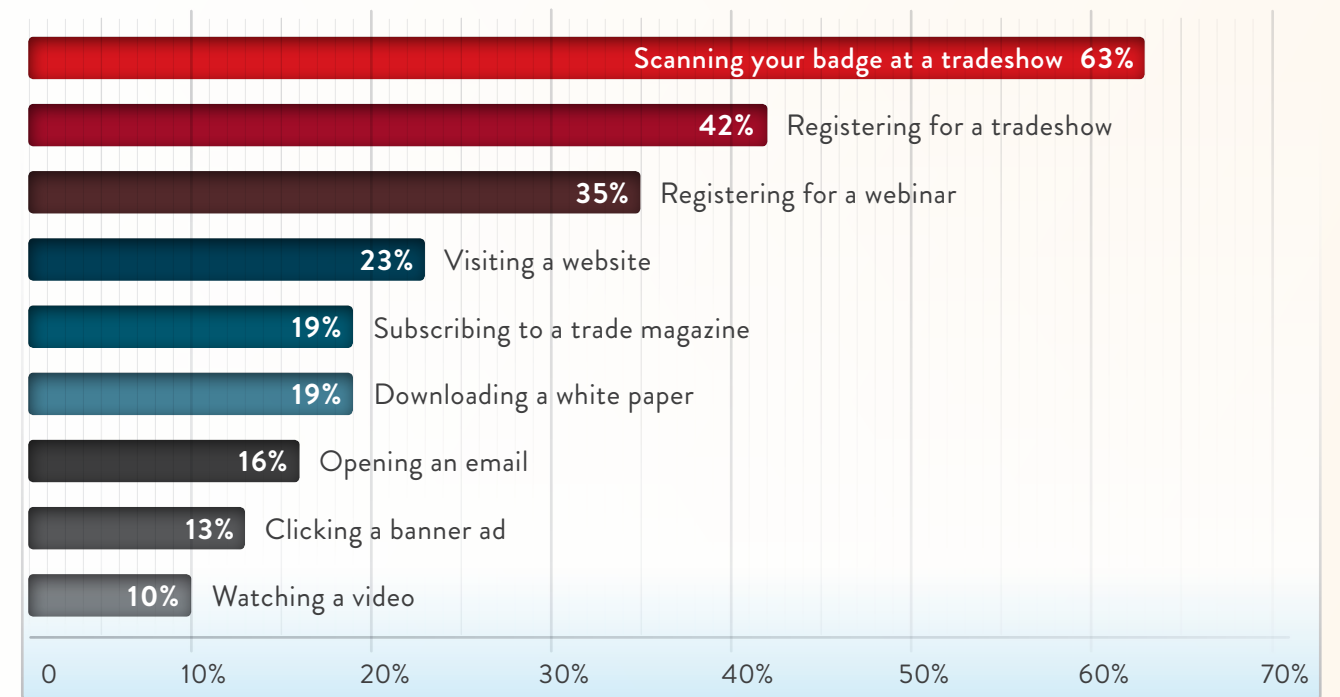
86.2% ANSWERED

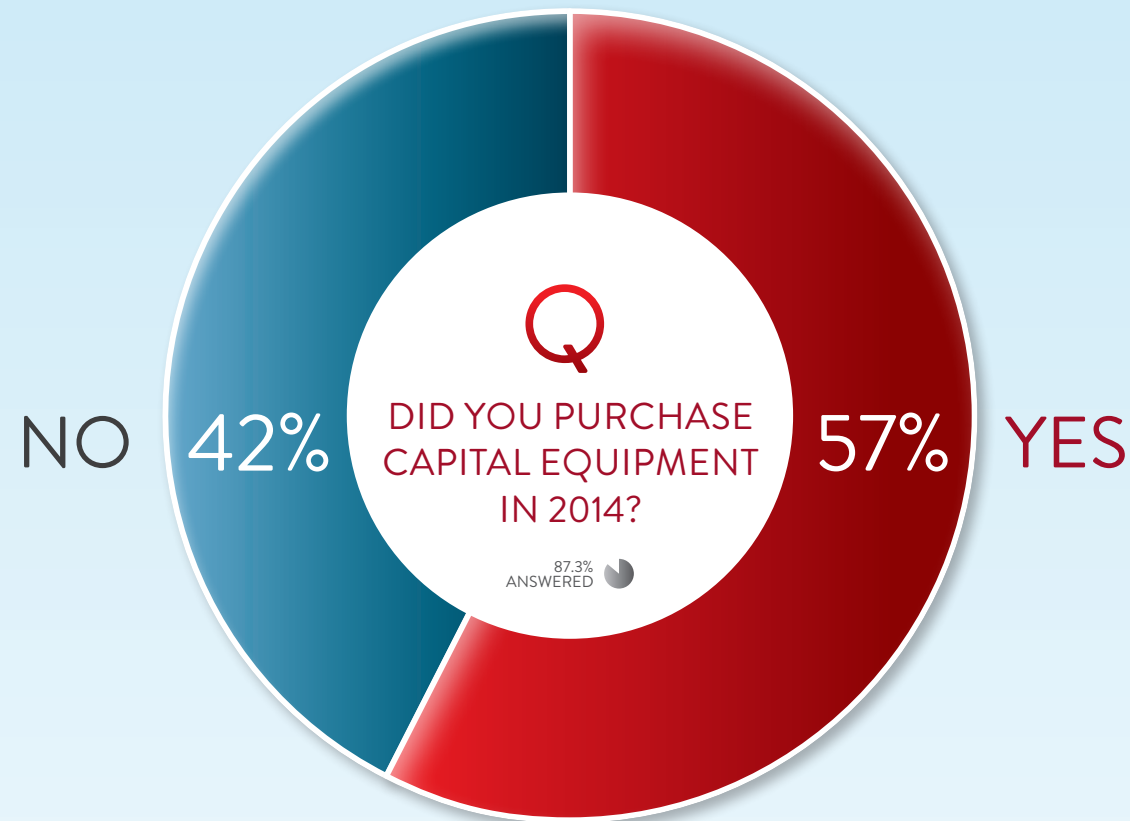


Word of mouth is formed through quality and through effective customer service. Not surprisingly, as buyers progress deeper into the sales cycle, the most influential factors in compiling a list of potential vendors are service, technology and reputation, in that order. Tactically, those buyers tend to reveal themselves via registration or direct contact transactions like tradeshows and webinars.

**Q** AFTER WHAT ACTIONS DO YOU EXPECT TO BE CONTACTED DIRECTLY BY A SALES REPRESENTATIVE?

85.8% ANSWERED

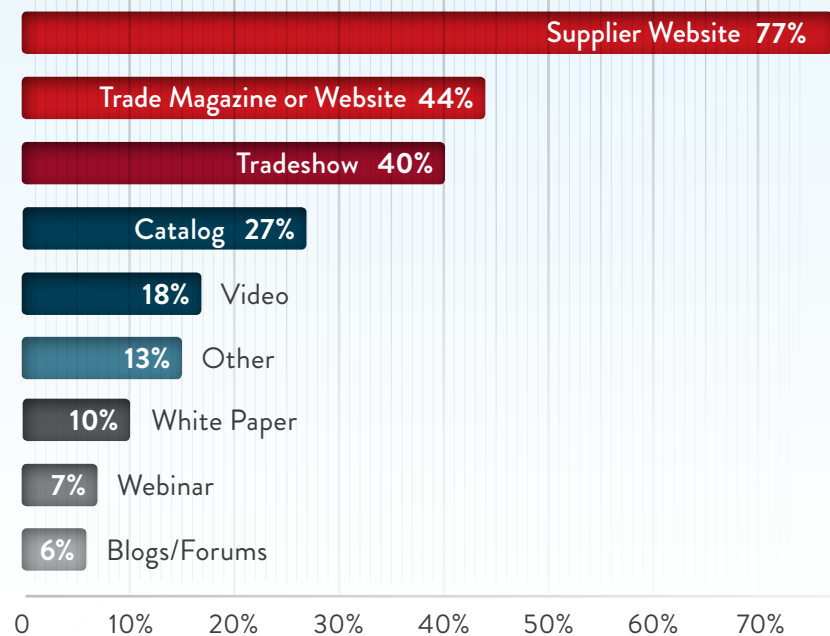




**Q** IF YES, WHICH DID YOU USE TO RESEARCH THAT PURCHASING DECISION?

53.9% ANSWERED

Lastly, as buyers finalize their purchasing decisions they visit your website, conduct research via trade media and collect in person information at events. It's important to note that buying teams consist of multiple influencers engaged in multiple channels accessing a variety of information. Ultimately, a dynamic integrated strategy that balances push tactics like print display, direct mail and email with pull tactics like SEO/SEM, webinars, blogs and websites is the most effective way to impact the industrial buying cycle.



## Four keys to industrial marketing



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MARKETING STRATEGY, SURVEY RESULTS  
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6915 VALLEY AVE.  
CINCINNATI, OH 45244  
(800) 950-8020  
(513) 527-8800  
FAX: (513) 527-8801