



2004 Technology Buyers Study

During Q4 2004, ASG completed our third annual study¹ on the influence of the industry analysts on technology buyers. The expanded scope of the 2004 study returned almost 500 individual responses, more than doubling our past study responses. With the 2004 Technology Buyer's Study, ASG is able to provide statistically significant findings for the North America, EMEA and Asia/Pacific regions, as well as several vertical markets including Public Sector, Financial Services, Manufacturing, and High Tech.

The information in this study is critical for technology and telecom vendors looking to better leverage the influence of analysts and consultants on their target customers and prospects to drive top-line revenues. Additionally, study findings can help quantify the importance of the AR function within the organization and provide insight to specific objectives that can be established for the AR team.

Key Findings

The 2004 study revealed several changes in buyer opinion from 2003 and 2002. Many of these changes were expected as the industry continues to evolve, but some were more pronounced than anticipated and others were wholly unexpected, including:

- Analyst firm usage and the importance of individual analyst firms within each region
- Analyst and consulting firm usage and importance based on IT buyer company size
- The credibility of each of the major analyst firms, with differences noted by region and vertical market
- What companies see as the true value of using the industry analysts and consultants
- The role of industry analysts and consultants (including boutiques) in buying decisions, and in which stage of the buying cycle they are important
- Who is reading analyst research, and the influence this research has in each stage of the buying cycle
- The relative importance of individual analysts vs. analyst firms, and individual consultants vs. consultancies

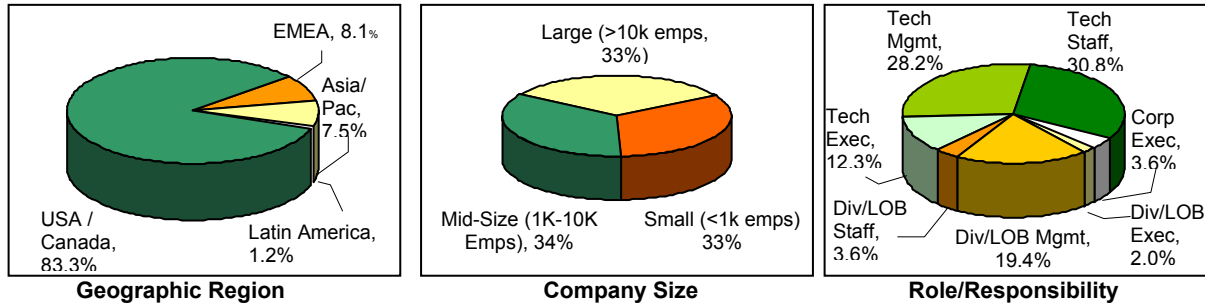
In addition to the study's primary focus on analysts and consultants, the influence of other information sources including the trade press, general media, personal networks, and domain experts provided by the vendors was investigated. Again, the findings provide important information for planning marketing activities:

- The role of each influencer group within Asia Pacific vs. EMEA vs. North America
- The relative influence of the media versus analysts and consultants at each stage of the buying process
- The relative impact of the media versus analysts and consultants on major and routine purchase decisions
- The critical importance of the vendor's domain experts at specific points in the buying process

¹ 2002/2003 studies were conducted under SageCircle, Inc.

Methodology

ASG developed a survey questionnaire to collect data from business executives, technology executives, technology managers, and technology staff. The survey was conducted over the Internet using the Perseus™ platform. For North American respondents, ASG leveraged Techtel's™ highly qualified and statistically normalized panel. For EMEA, AsiaPac, and Latin America ASG worked through Tech Target to gain access to the IT buying audience. Respondents fell into the following categories:



Deliverables

Research Report

The Research Report is available in Adobe PDF format, and includes the following sections:

- **Introduction:** Defines study objectives, methodology, and terminology
- **Respondent Demographics:** Identifies geographic, role/responsibility, company size, and industry profile of study respondents
- **Influencers on Technology Buyers:** Presents which information sources are used by technology buyers, the stages of the sales cycle in which each information source is used, and the relative importance of each information sources in technology purchase decisions
- **Buyers' Use of Analysts and Consultants:** Focuses on advisory analysts, market research analysts, major consultancies, and sourcing advisors to explore reasons for use, impact, credibility, venues of influence, and projected use
- **Conclusions:** Presents a summary of key findings regarding the full spectrum of influencer groups, with specific conclusions distilled for industry analysts and consultancies

Questionnaire

The full questionnaire is included as an appendix to the Research Report.

Data Tables

A complete copy of the raw survey response data in Microsoft Excel XP™ format is available for an additional fee. The raw data supports ad hoc segmentation of survey responses based on customer-specific demographic considerations, including Company Revenues, IT Budget, # of Employees, Buyer Role, Geography, etc.

Review Session and Presentation Slides

A 90-minute teleconference session with ASG to review and discuss study findings supported by a set of executive presentation slides in Microsoft PowerPoint XP™ format that highlights the key findings from the study. Ideally, the teleconference review session will include company executives and members of the sales leadership team. The teleconference session includes a 1-hour pre-session conference call with the project sponsor to establish the agenda and tune the content for the review session.

Pricing

Please contact Rob Kolokousis at ASG for pricing levels (408-737-2320) or rob@analyststrategy.com

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