Decoding Engineer Preferences:

Insights into Technical Buying Behavior in Europe

An Elektor and TREW Marketing research collaboration

TREW MARKETING

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Introduction

Welcome to the first (2023) edition of ***Decoding Engineer Preferences:*** *Insights into Technical Buying Behavior in Europe*. This research provides valuable insights into the information needs and preferences of European technical buyers.

The report is a collaborative effort between Elektor and TREW Marketing and is based on a survey of over 1,200 engineers and technical professionals across Europe and covers a broad range of topics, including search behavior, the use of AI tools, content preferences, and most valued marketing channels.

Decoding Engineer Preferences: Insights into Technical Buying Behavior in Europe is designed to:

- identify the most effective marketing channels;
- improve your content strategy;
- educate and forge alignment between your leadership and sales organizations.

Join the webinar at www.elektormagazine.com/trew-webinar

Please note: percentages may not always add up to 100%, due to multi-select or rounding.

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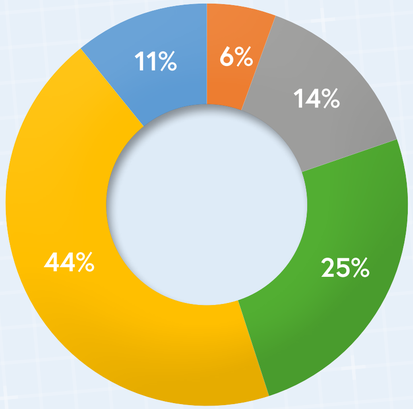
About the survey respondents (1)

A comprehensive survey served as the foundation for our research. The nearby data and graphs shed light on the participants. Gathered from various forms of media, including print, digital, and video, these findings stem from a robust and representative set of over 1,200 respondents. This comprehensive dataset offers a glimpse into the rich and varied landscape of European technical buyers.
It's noteworthy that the 'n,' or total number of respondents, varies for each question, as not every query was mandatory.

Participants by AGE

n = 1220

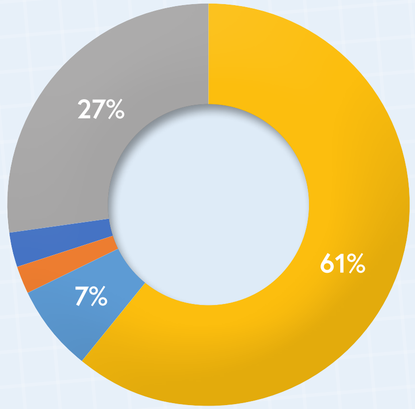
66+	**11%**
56 - 65	**44%**
46 - 55	**25%**
36 - 45	**14%**
35 and under	**6%**



Participants by COMPANY SIZE

n = 1220

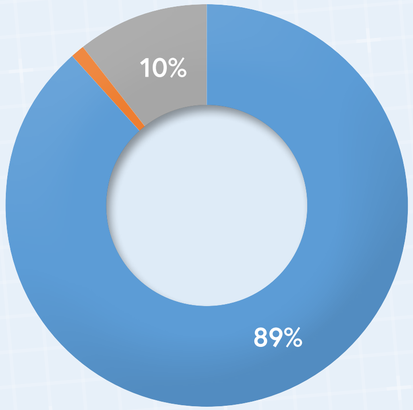
1 - 250	**61%**
251 - 500	**7%**
501 - 750	**2%**
751 - 1,000	**3%**
Over 1,000	**27%**



Participants by GENDER

n = 929

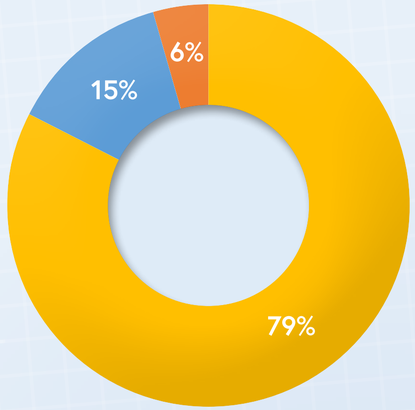
Female	**1%**
Male	**89%**
Not specified	**10%**



Participants by JOB FUNCTION (Top 3)

n = 929

Manufacturing staff	**6%**
Gen. Management / Corp. Leadership	**15%**
Engineering / R&D	**79%**



About the survey respondents (2)

Participants by **PRIMARY INDUSTRY**

n = 1220

Electronic Components / Semiconductors	**24%**
Academic / University	**11%**
Communications and Networking	**9%**
Automotive	**8%**
Process Technology	**6%**
Medical Devices / Equipment	**6%**
Aerospace / Defense	**6%**
Utilities / Utilities Infrastructure	**5%**
Energy and Natural Resources	**4%**
Life Sciences	**1%**
Other	**20%**

Participants by **PRIMARY COUNTRY**

n = 1220

Germany	**41%**
France	**14%**
The Netherlands	**13%**
Belgium	**6%**
United Kingdom	**5%**
Austria	**4%**
Switzerland	**4%**
Italy	**2%**
Spain	**2%**
Greece	**1%**
Portugal	**1%**
Sweden	**1%**
Other	**6%**

Key takeaways for industrial marketers

48% of engineers spend half or more of the **buyer's journey online** before engaging with sales.

Technical buyers find datasheets, technical publication articles, and product reviews/testimonials **most valuable** when researching to make a purchase.

The most **popular sources** for information are online technical publications **(84%)** and vendor websites **(75%).**

89% of engineers watch work-related videos, **58%** of engineers listen to work-related podcasts.

64% of engineers subscribe to **3+ newsletters.**

56% of engineers plan to **attend** at least one **in-person event** in 2024.

Engineers look for **assistance** from sales because of the **technical complexity** of the solution and to seek pricing/inventory information.

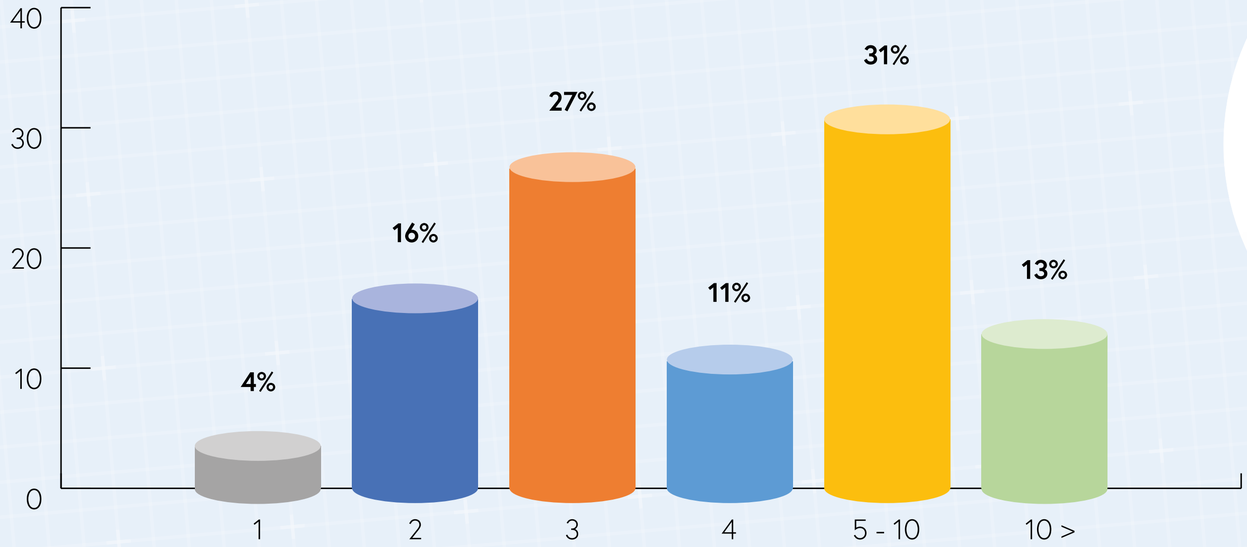
European engineers consider GitHub, YouTube and Stack Overflow the most valuable **'social media' platforms** for work.

Engineers search deeply, filtering through **4+ pages** of results to find the information they're looking for.

Seeking answers (1)

When searching for work-related information using a search engine, how many pages of results are you willing to review before you select a page to visit or restart your search?

n = 1135



Welcome to the era of the self-serve B2B tech buyer. According to recent data, B2C trends like convenience and access to easy-to-find product information like pricing and peer-to-peer reviews have infiltrated business buyers' behavior. B2B tech buyers want all basic information at their fingertips and to validate with peers–without the gatekeepers.

Gary Drenik @Forbes

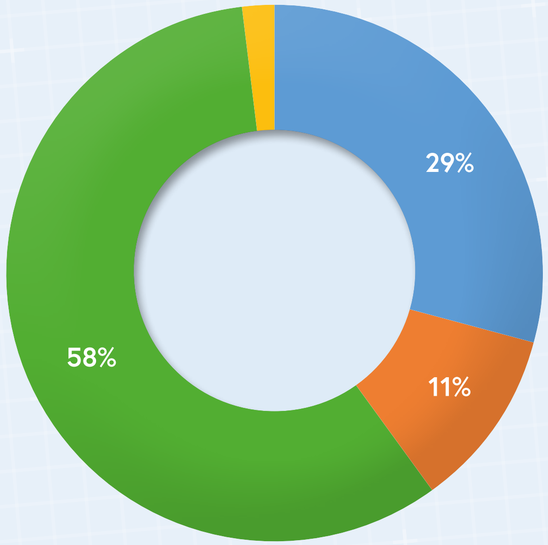
www.forbes.com/sites/garydrenik

44% of engineers will **filter** through at least **five pages** of search results to find what they're looking for. Only **4%** stick to the **first page** of search results.

Seeking answers (2)

Search engines allow companies to purchase ads that appear as links in your list of search results. This is called "paid search". How, if at all, do you interact with paid search links?

n = 1131



29% If the search result looks helpful, I'll click on a paid search link

11% If it's a website I'm familiar with, I'll click on a paid search link

58% I actively avoid clicking on paid search links

2% Search engines put paid search links at the top of my results?

Buyers trust third-party opinion more than your brand marketing. That should be reflected in a smart online advertising strategy.

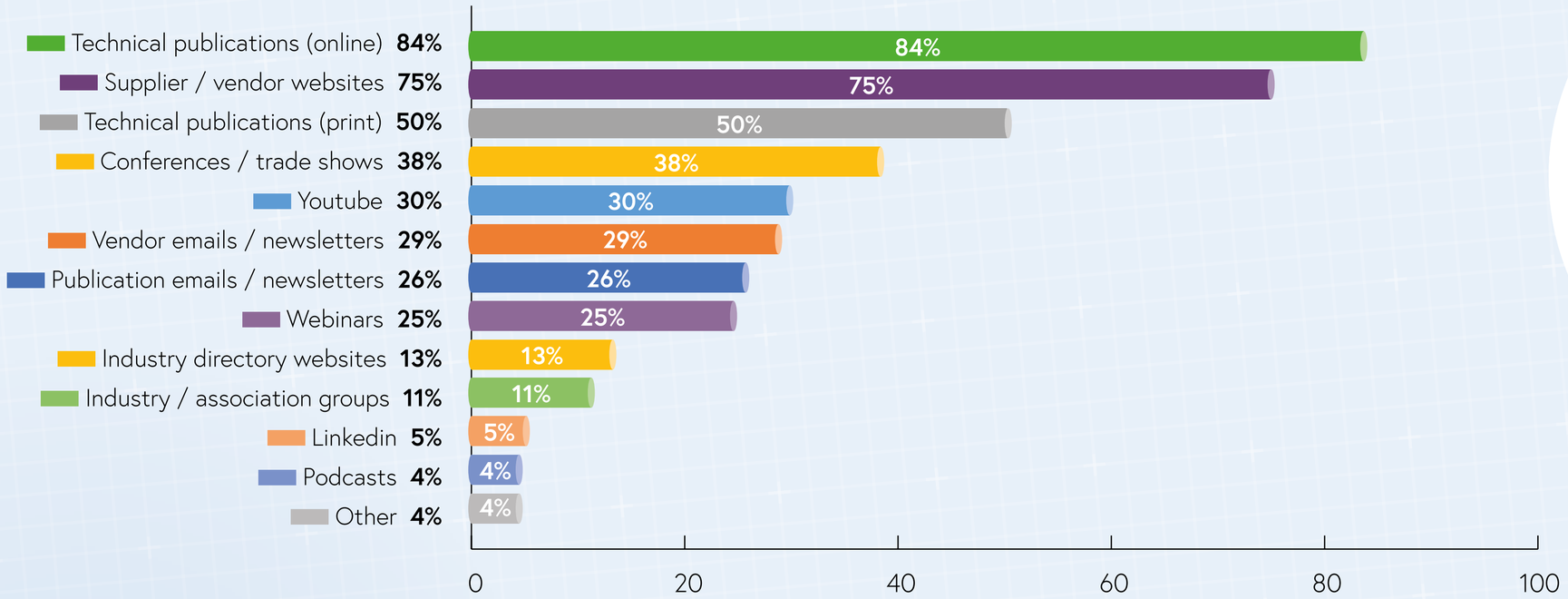
Erik Jansen
@Elektor International Media

When searching online, **58%** of engineers **avoid paid search** links at all costs. However, if the **paid link looks helpful** for the search inquiry, **29%** will click.

Channels and site organisation

Where do you routinely seek information when researching a product or service for a work-related purchase? Multiple answers are possible.

n = 1139

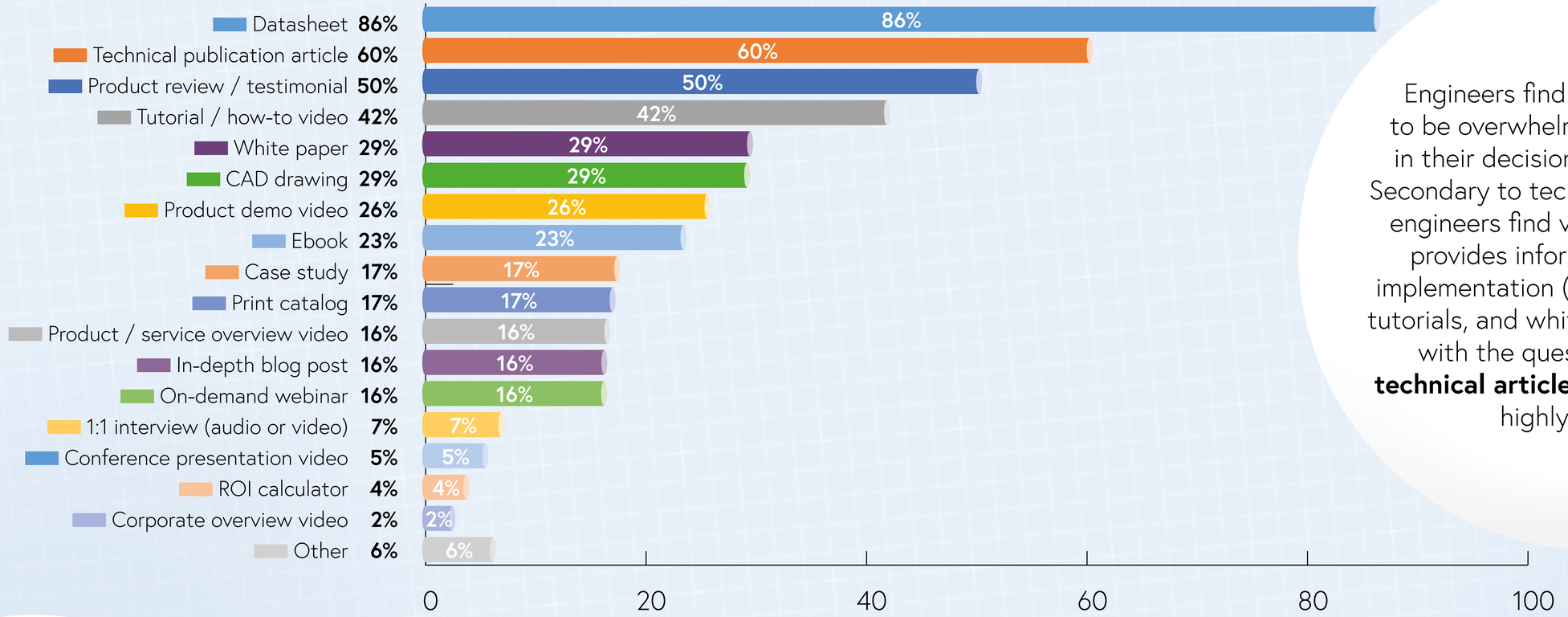


Most European engineers rely on online (1st) and print (3rd) **technical publications** when researching a specific product or service. A strong (2nd) role is reserved for **supplier/vendor websites.**

Content preferences (1)

What form(s) of content do you find most valuable when researching to make a significant work-related purchase? Please select all that apply. Multiple answers are possible.

n = 1197

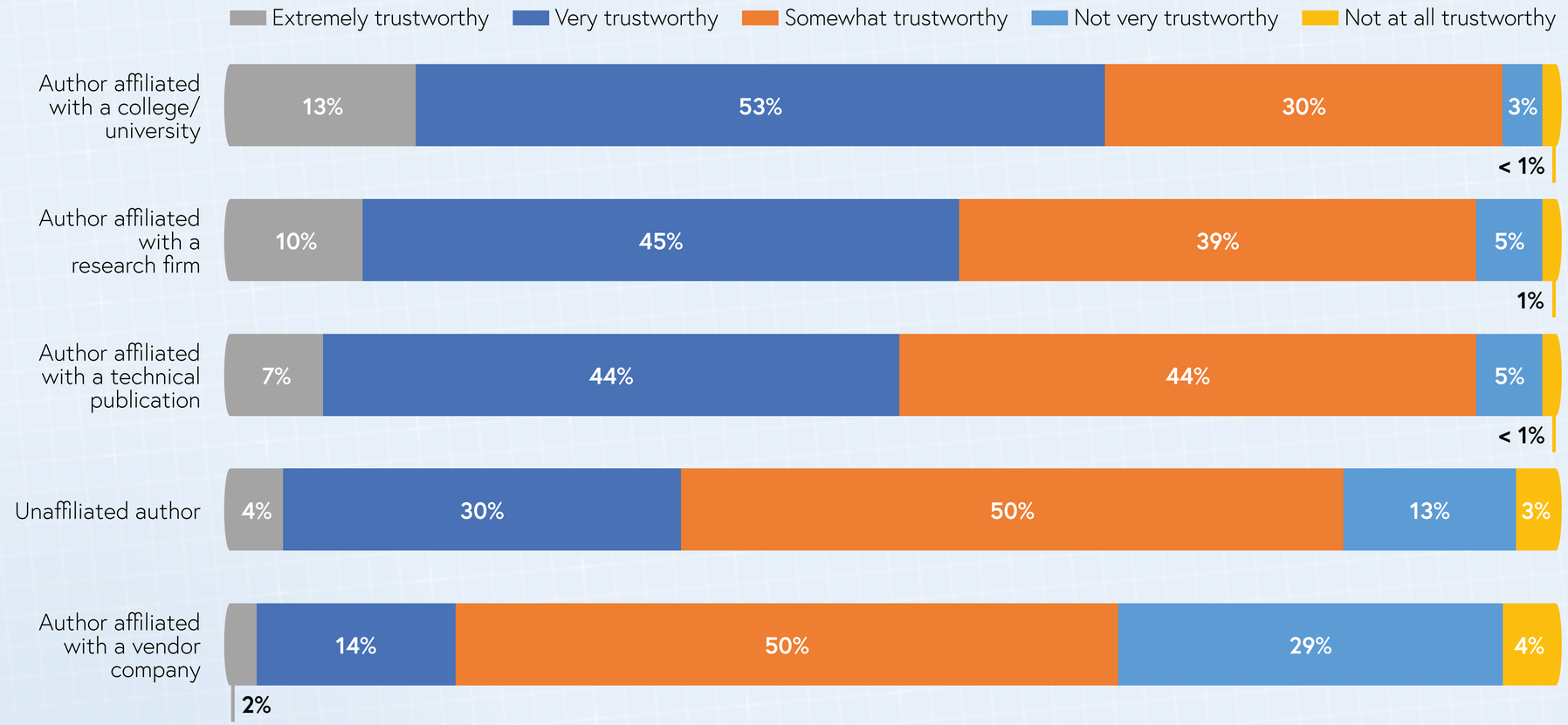


Engineers find **datasheets (86%)** to be overwhelmingly of most value in their decision-making processes. Secondary to technical documentation, engineers find value in content that provides information on use and implementation (e.g., product reviews, tutorials, and white papers). Consistent with the question on channels, **technical articles (60%)** are regarded highly in Europe.

Content preferences (2)

Technical content can be written and published by a variety of professionals. To what extent do you trust each of the following expert authors?

n = 1153



Content published by authors **affiliated** with a college/university, research firm, and/or technical publication are considered the **most trustworthy** from an engineer's perspective.

Newsletters (1)

Approximately how many work-related newsletters do you subscribe to?

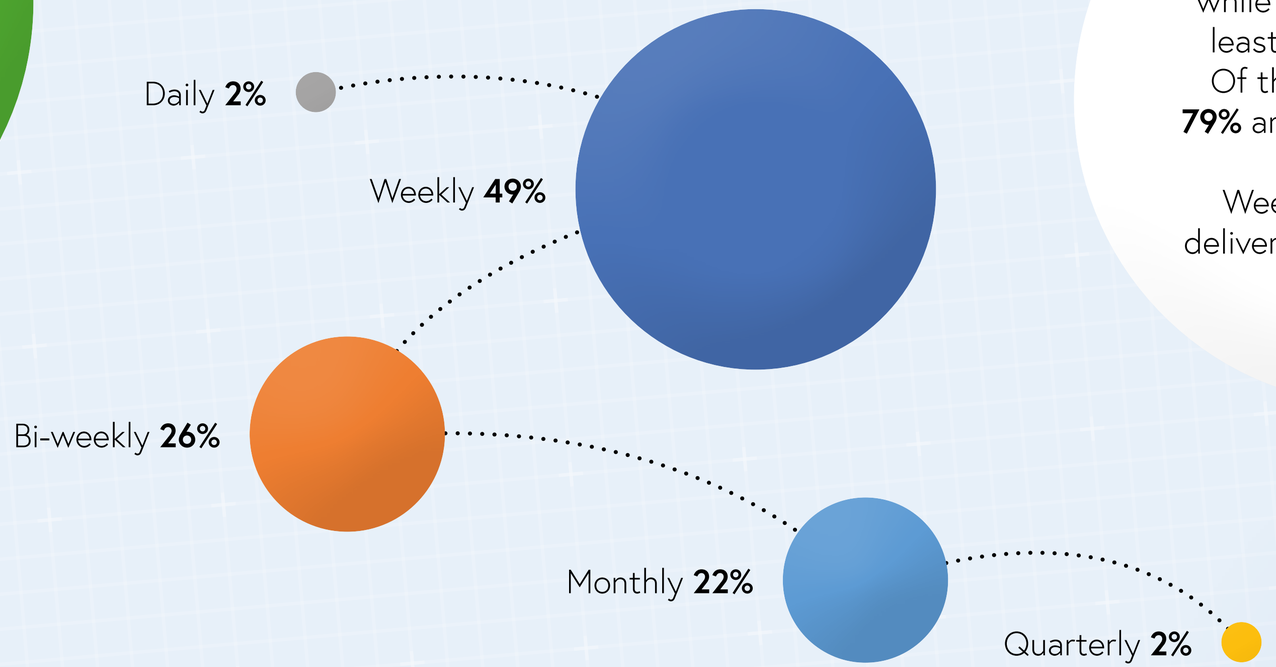
n = 1052

0	**7%**
1 - 2	**21%**
3 - 5	**43%**
6+	**28%**

Average rating: **3.7**

For newsletters you've subscribed to, what delivery cadence do you prefer?

n = 976



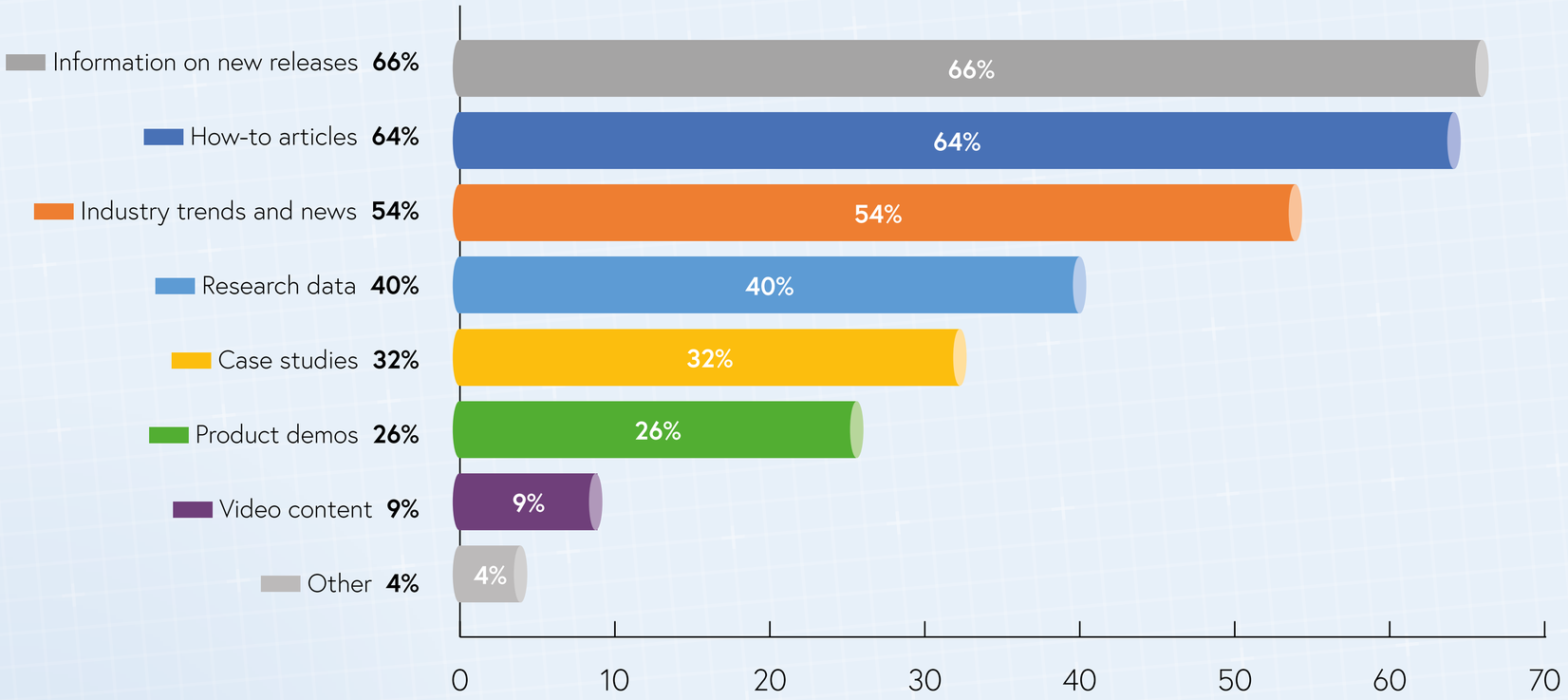
93% of engineers subscribe to at least one **newsletter**, while **71%** subscribe to at least three newsletters. Of the non-subscribers, **79%** are over the age of 45.

Weekly and bi-weekly delivery cadences are most preferred.

Newsletters (2)

**Think of your favorite work-related newsletter.
Which elements of that newsletter make it a winner?
Multiple answers are possible.**

n = 971

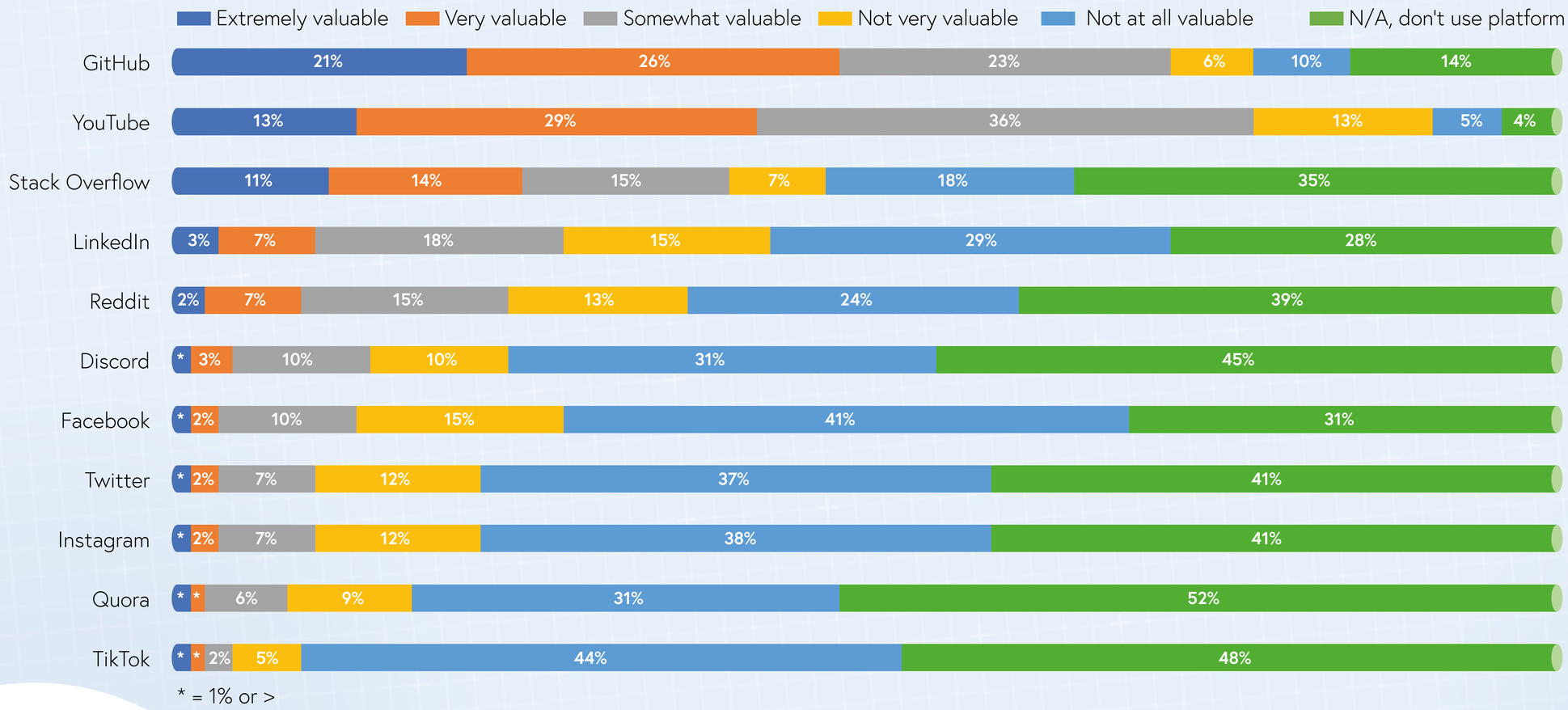


To engineers, information on **new releases** and **how-to articles** are the most **compelling aspects** of a newsletter, followed shortly by **industry trends** and news.

Social Media and sharing (1)

How valuable are each of the following social media platforms when seeking information on the latest engineering technologies, industry trends, and products?

n = 1035

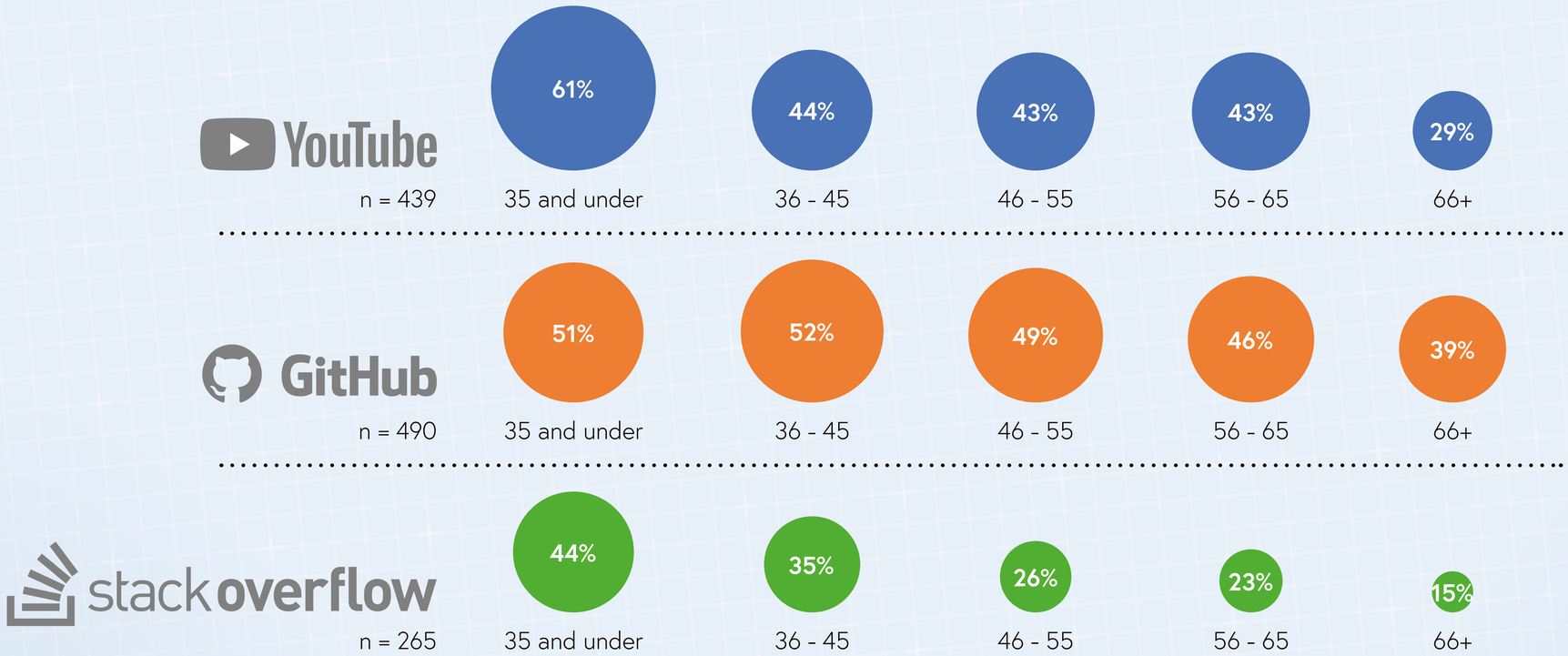


* = 1% or >

GitHub, YouTube and Stack Overflow help engineers **stay up to date** on the latest trends and technology.

Social Media and sharing (2)

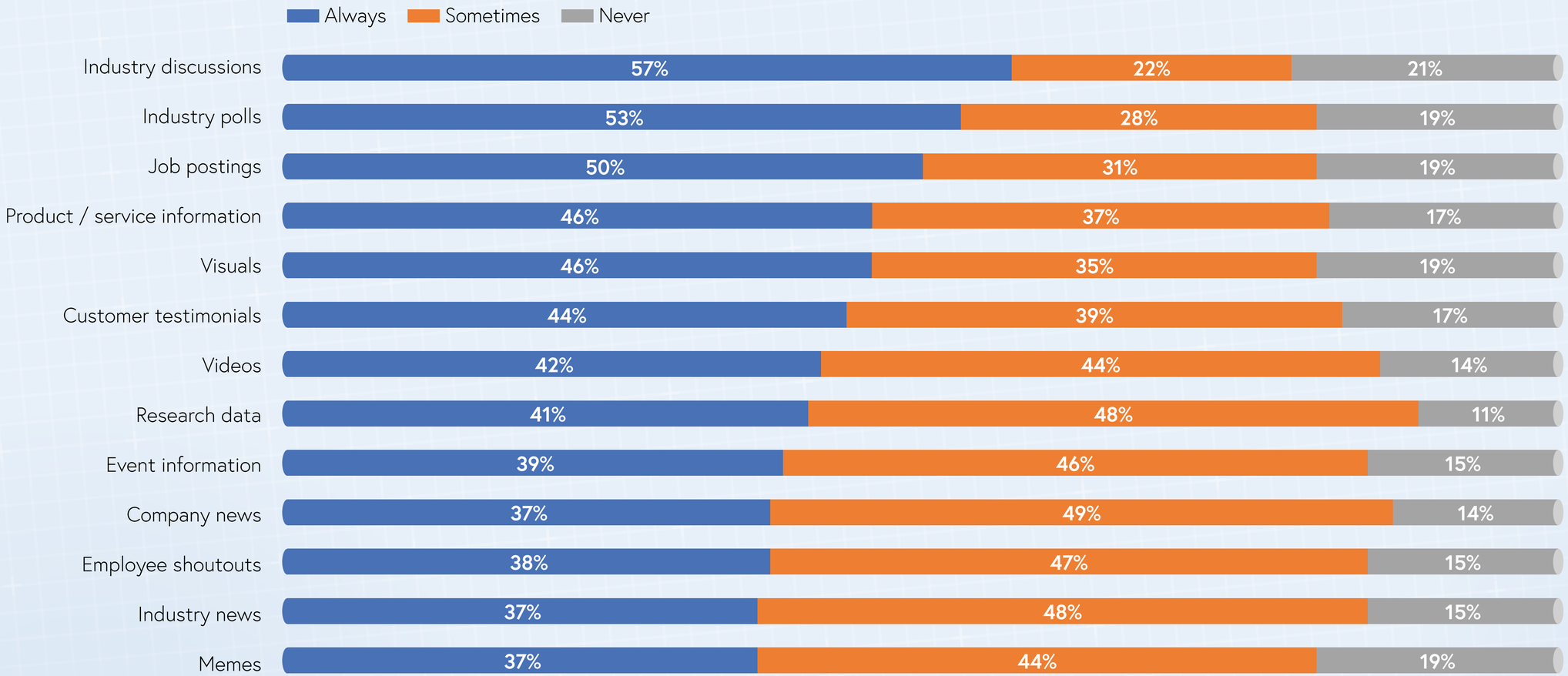
When we zoom in on Youtube, GitHub and Stack Overflow, we can dive deeper into the age of the respondent who recognize these platforms as "extremely" or "very" valuable.



Social Media and sharing (3)

When visiting LinkedIn, what makes you stop scrolling?

n = 1003

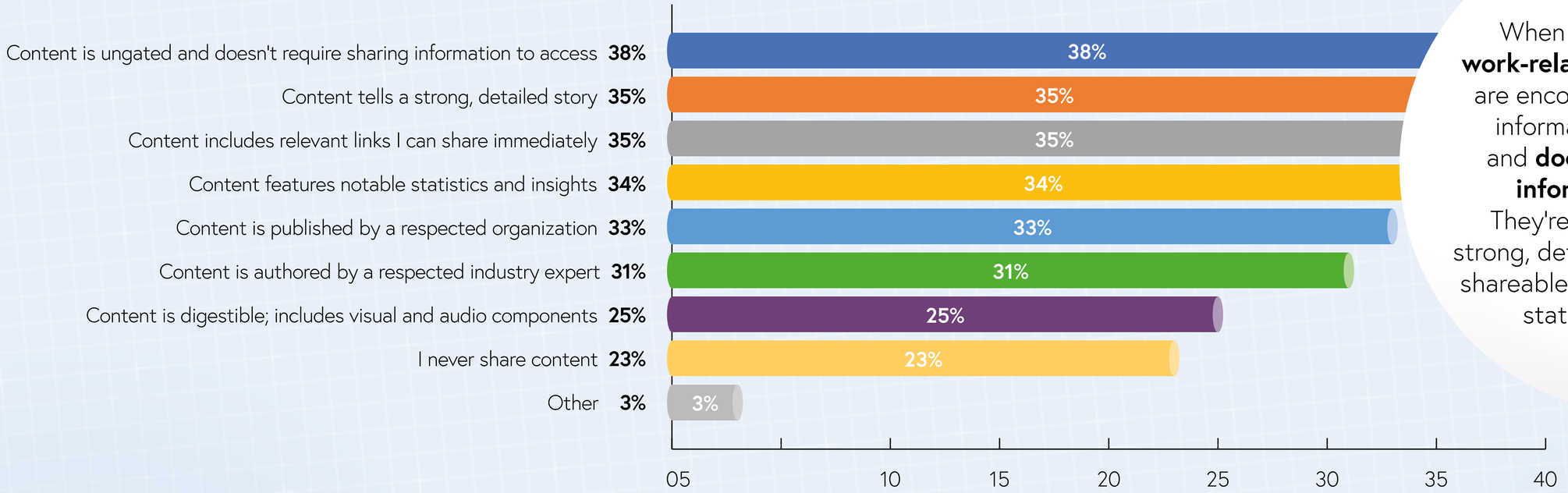


When reflecting on their time on LinkedIn, industry discussions and polls are the most eye-catching.

Social Media and sharing (4)

Which of the following encourages you to share work-related content? Multiple answers are possible.

n = 996

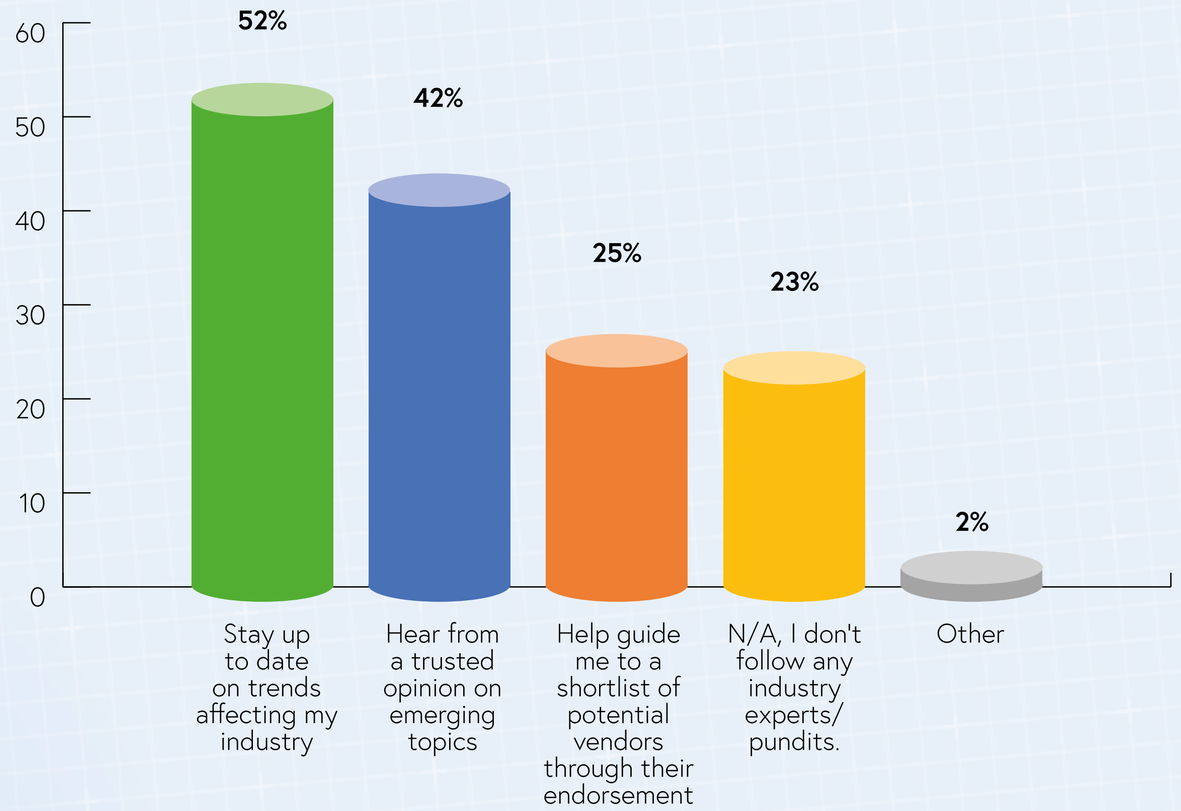


When considering **sharing work-related content**, engineers are encouraged when they find information that is ungated and **doesn't require sharing information to access**. They're also **motivated** by a strong, detailed story, relevant and shareable links and lastly, notable statistics and insights.

Industry experts (1)

I look to specific industry experts / pundits to _____.
Multiple answers are possible.

n = 993

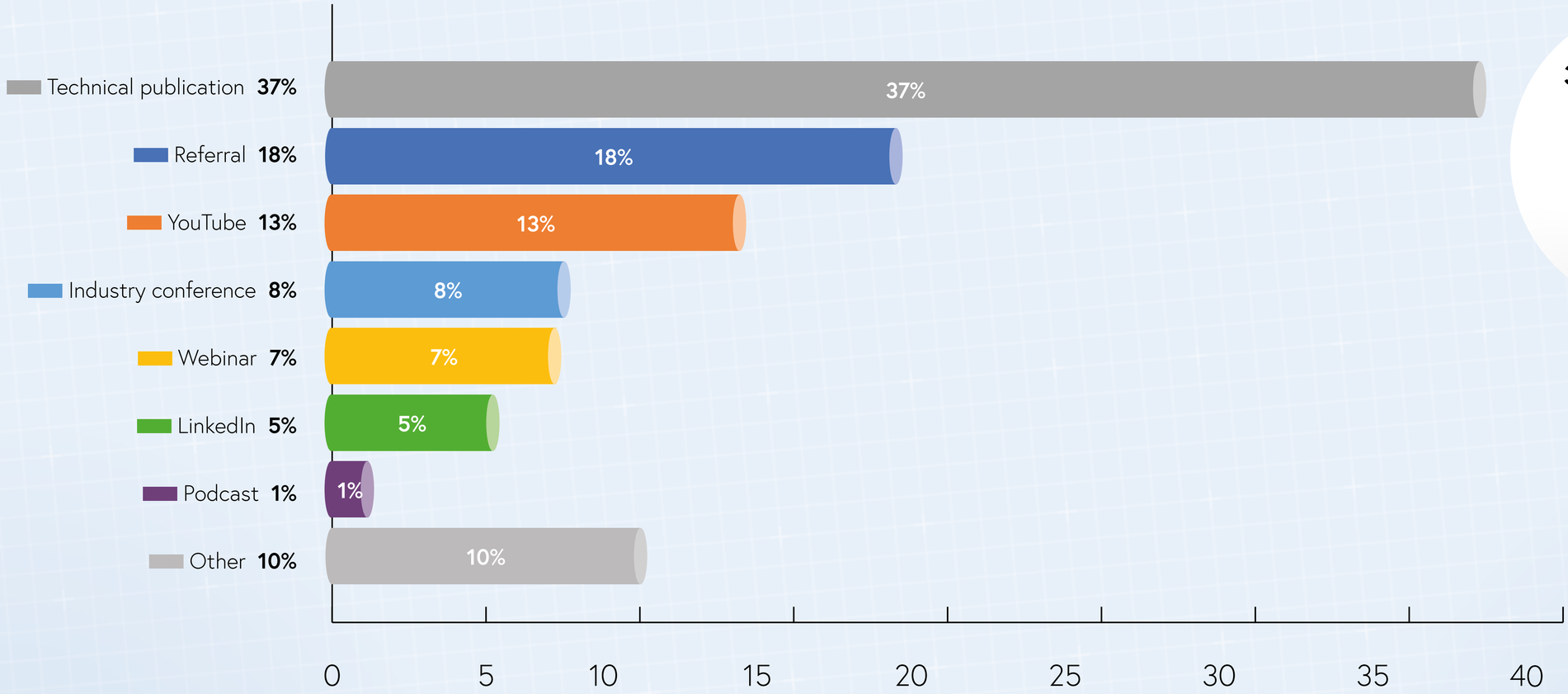


77% of engineers turn to some sort of expert(s) or pundit(s) in the industry. **52%** seek information on industry trends, **42%** seek trusted opinions, and **25%** seek vendor endorsements. Of those who say they don't follow industry experts, **81%** are over the age of 45.

Industry experts (2)

Think of your go-to industry expert / pundit. How did you discover them?

n = 770



37% of engineers find industry experts and pundits though **technical publications.**

Industry experts (3)

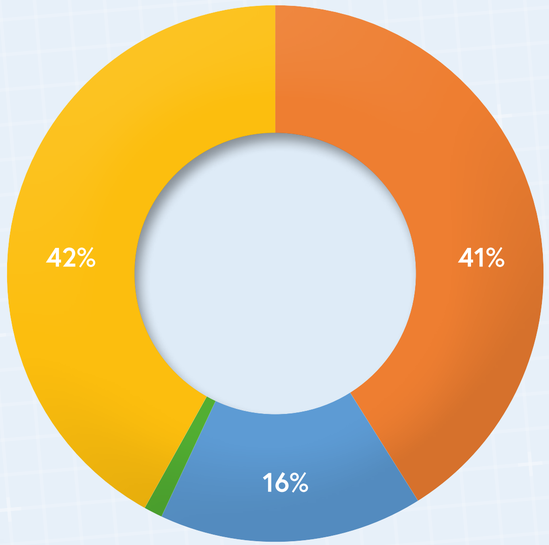
Expert sources and perspectives named by respondents.



Podcasts

Approximately how much time per week do you spend listening to work-related podcasts?

n = 1069



41% Less than 1 hour
16% Between 1 and 5 hours
1% More than 5 hours
42% I do not listen to work-related podcasts

58% of engineers listen to work-related podcasts. **41%** spend less than an hour listening to podcasts, while another **17%** listen for an hour or more. Of those who don't listen to work-related podcasts, **83%** are over the age of 45.

44% of senior-level decision makers make a concerted effort to listen to podcasts. The audio format of podcasts is appealing to key decision makers as it saves time, energy, and bandwidth and allows for multitasking.

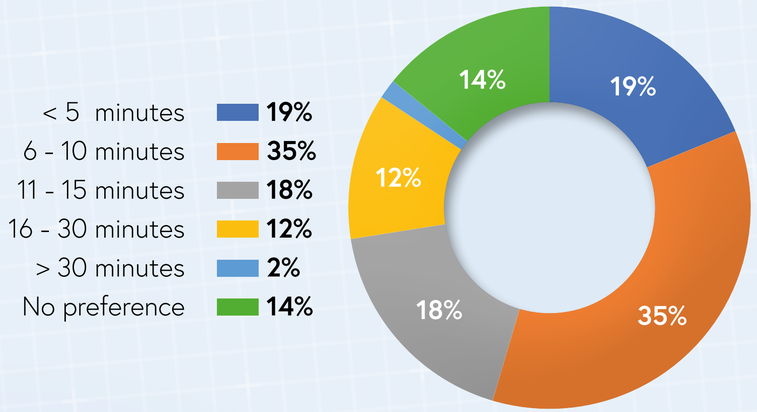
@lowerstreet.co

https://lowerstreet.co/blog/b2b-podcasting

Videos (1)

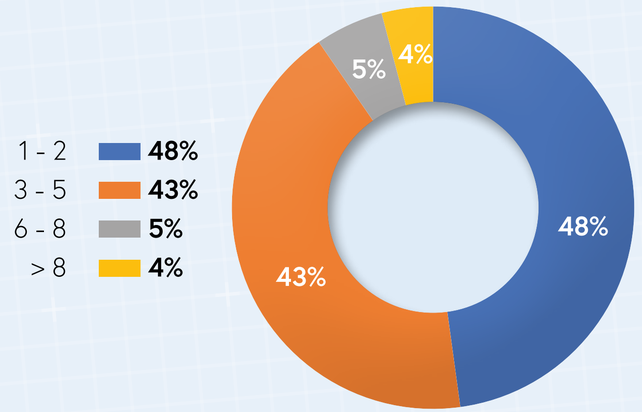
What is the ideal length for a video?

n = 953



How many videos do you typically watch about a product or service before deciding to purchase it?

n = 947

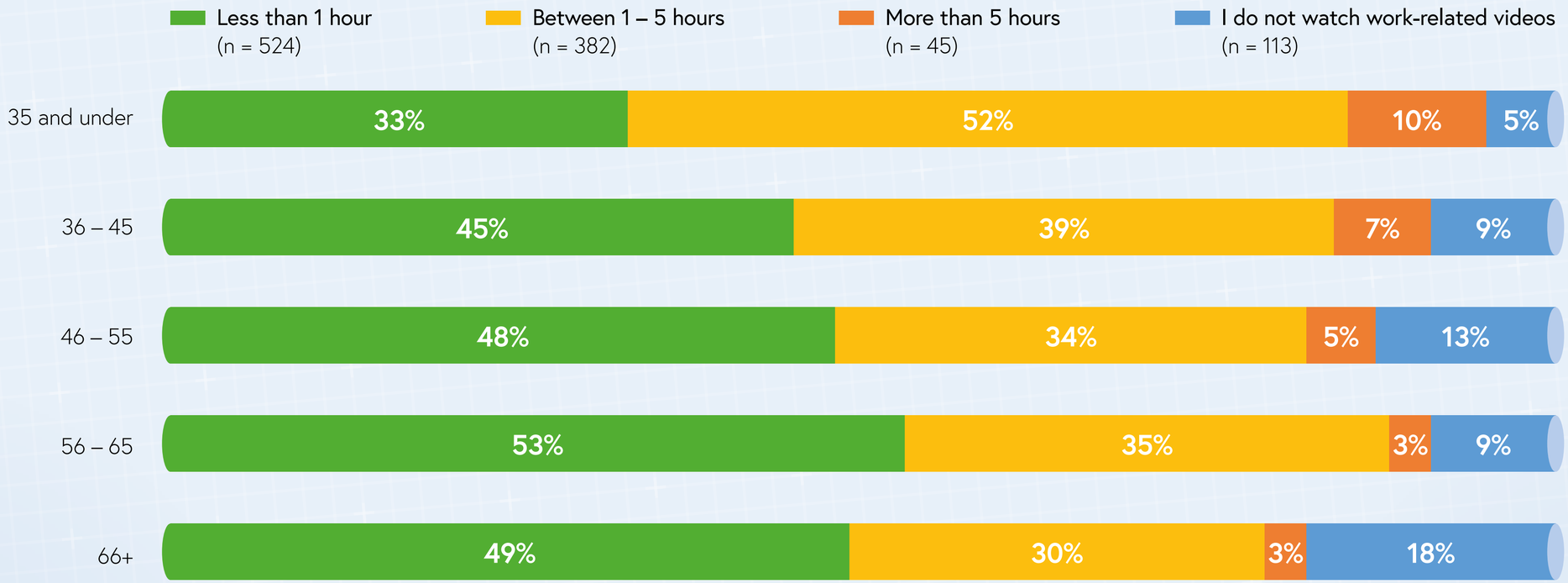


Of those who look at work-related videos, **84%** would prefer a duration of **30 minutes** or less. **72%** say **15 minutes** tops.

Videos (2)

Approximately how much time per week do you spend watching work-related videos?

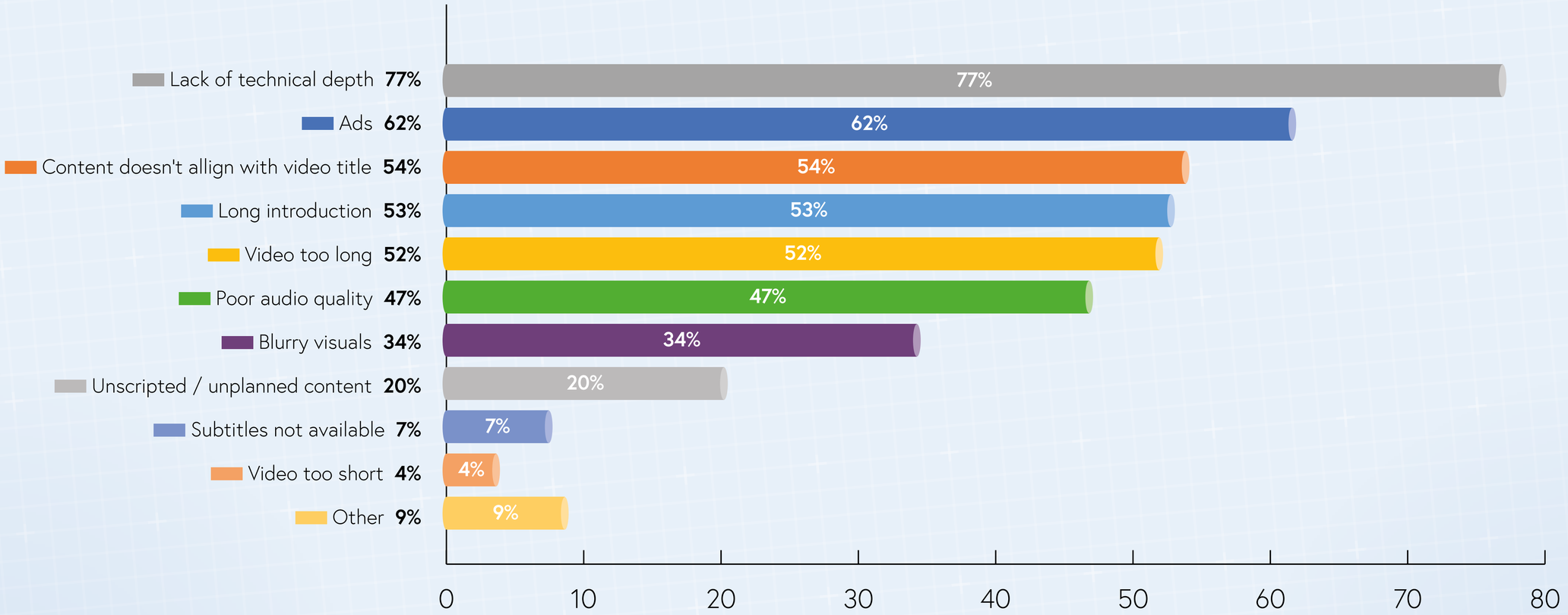
n = 1064



Videos (3)

What makes you stop watching a product- or service-related video to the end? Multiple answers are possible.

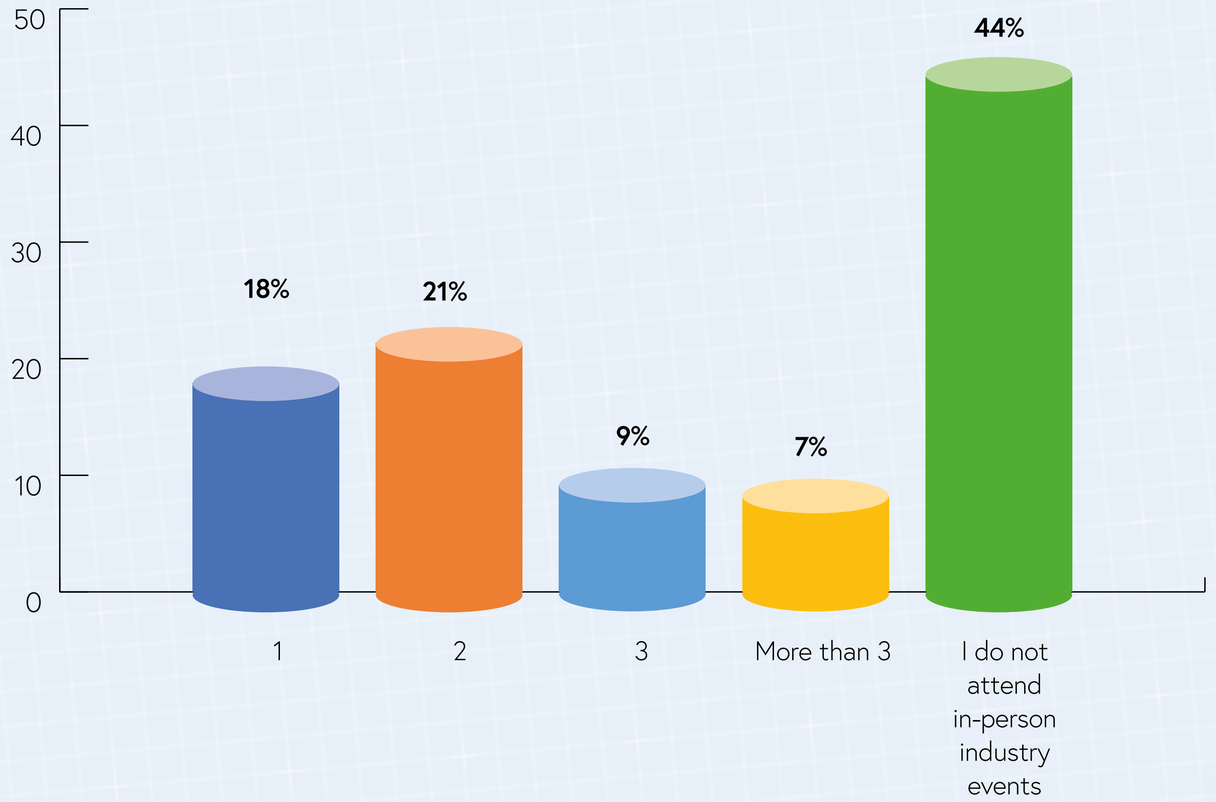
n = 940



In-person events (1)

How many in-person industry events (i.e., trade shows, conferences) do you plan to attend in 2024?

n = 978



Live events and personal encounter is unbeatable - a trusting partnership needs personal interaction! ... and trade fairs fulfil this in person interaction in an ideal way.

Dr. Martin Lechner
Executive Director
Messe München

When thinking about the year ahead, **56%** of engineers plan to attend at least 1 in-person industry event in 2024.

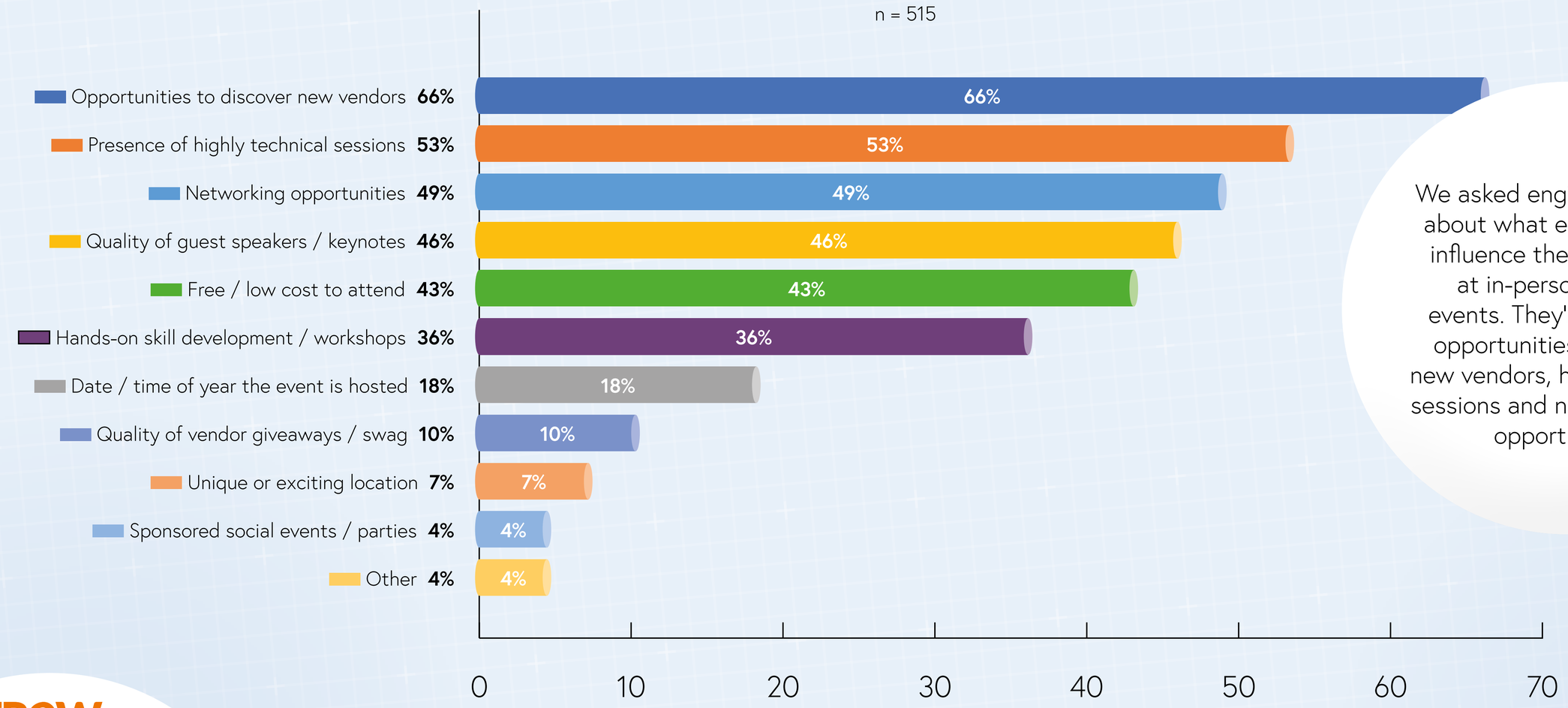
In-person events (2)

Events respondends said to be attending in the year to come.



In-person events (3)

Which in-person event element(s) are most valuable to you? Multiple answers are possible.

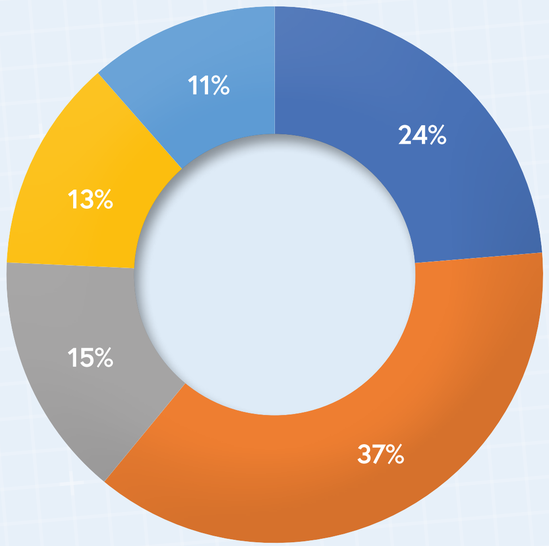


We asked engineers to think about what elements most influence their experience at in-person industry events. They're looking for opportunities to discover new vendors, highly technical sessions and new networking opportunities.

In-person events (4)

How far are you willing to travel for an in-person event (i.e., trade shows, conferences) related to work?

n = 515



- **24%** I prefer local events only (within 100 km / 62 miles of my location)
- **37%** I am willing to travel regionally (within 500 km / 310 miles of my location)
- **15%** I am willing to travel to neighboring countries
- **13%** I am willing to travel anywhere within Europe
- **11%** I am willing to travel internationally (outside of Europe)

In 2023, live events are becoming a significant driver of corporate travel, especially in Europe and the U.S.

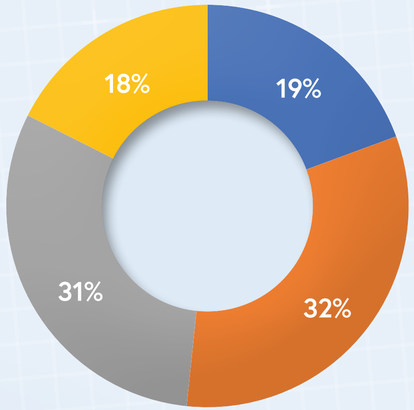
Deloitte

(2023 Travel Industry Outlook)

Interaction with sales (1)

In thinking about the entire buying process for significant work-related purchases, from early research to the final purchase decision, how much of the process happens online before you choose to speak to someone at the company?

n = 939



0% - 25%	**19%**
26% - 50%	**32%**
51% - 75%	**31%**
76% - 100%	**18%**

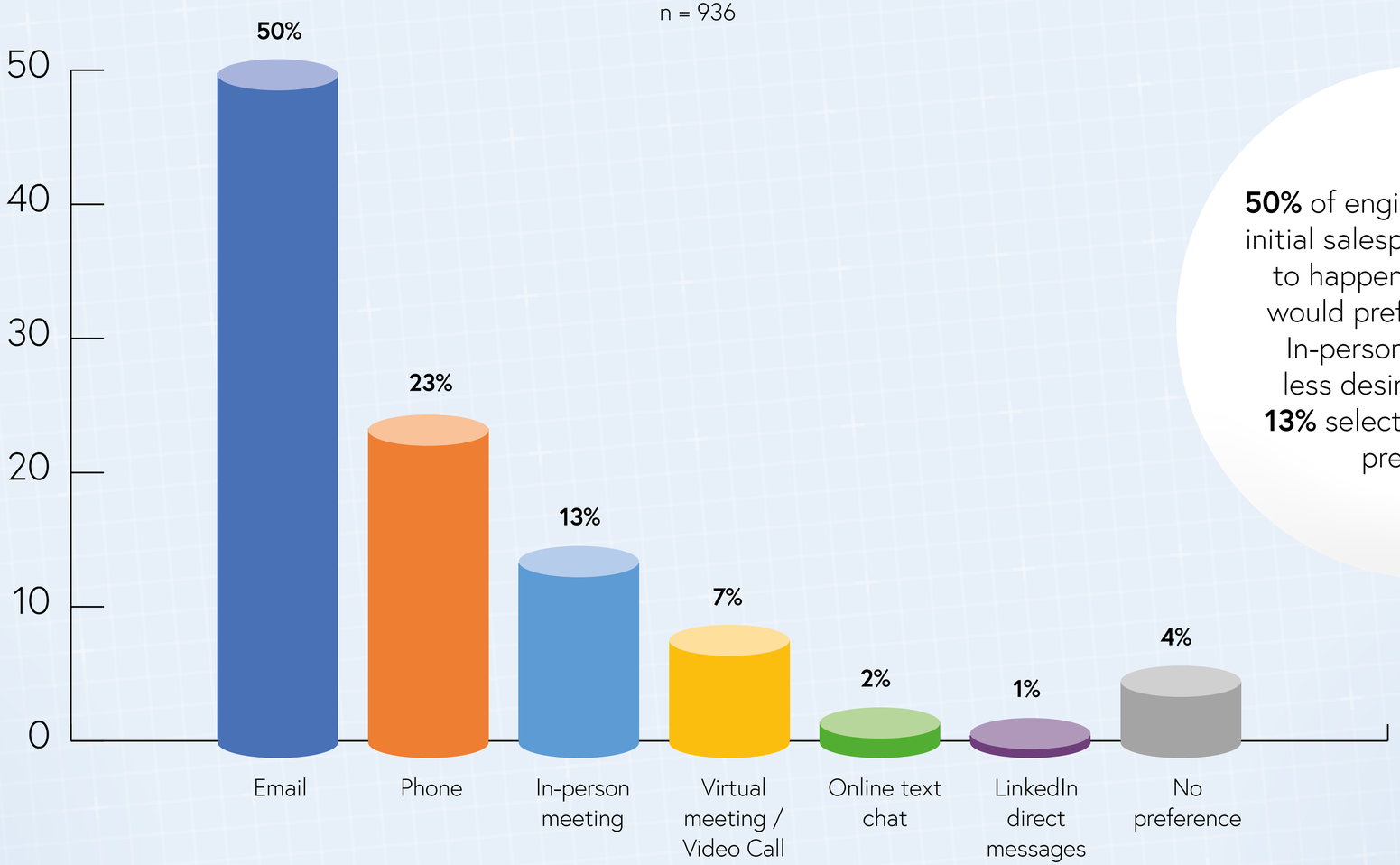
	% online			
Age	0% - 25%	26% - 50%	51% - 75%	76% - 100%
35 and under (n = 55)	13%	25%	40%	22%
36 – 45 (n = 135)	17%	35%	34%	14%
46 – 55 (n = 225)	18%	32%	30%	20%
56 – 65 (n = 421)	22%	32%	29%	17%
66+ (n = 103)	17%	34%	28%	20%

Engineers still spend much of the buying process online. **32%** spend between a quarter and half of the buying process online, and **48%** spend over half the buying process online.

Interaction with sales (2)

When you are ready to speak with a salesperson at a vendor company for the first time, which of the following is your preferred method of communication?

n = 936



50% of engineers prefer their initial salesperson interaction to happen via email. **23%** would prefer a phone call. In-person meetings are less desirable with only **13%** selecting this as their preference.

Interaction with sales (3)

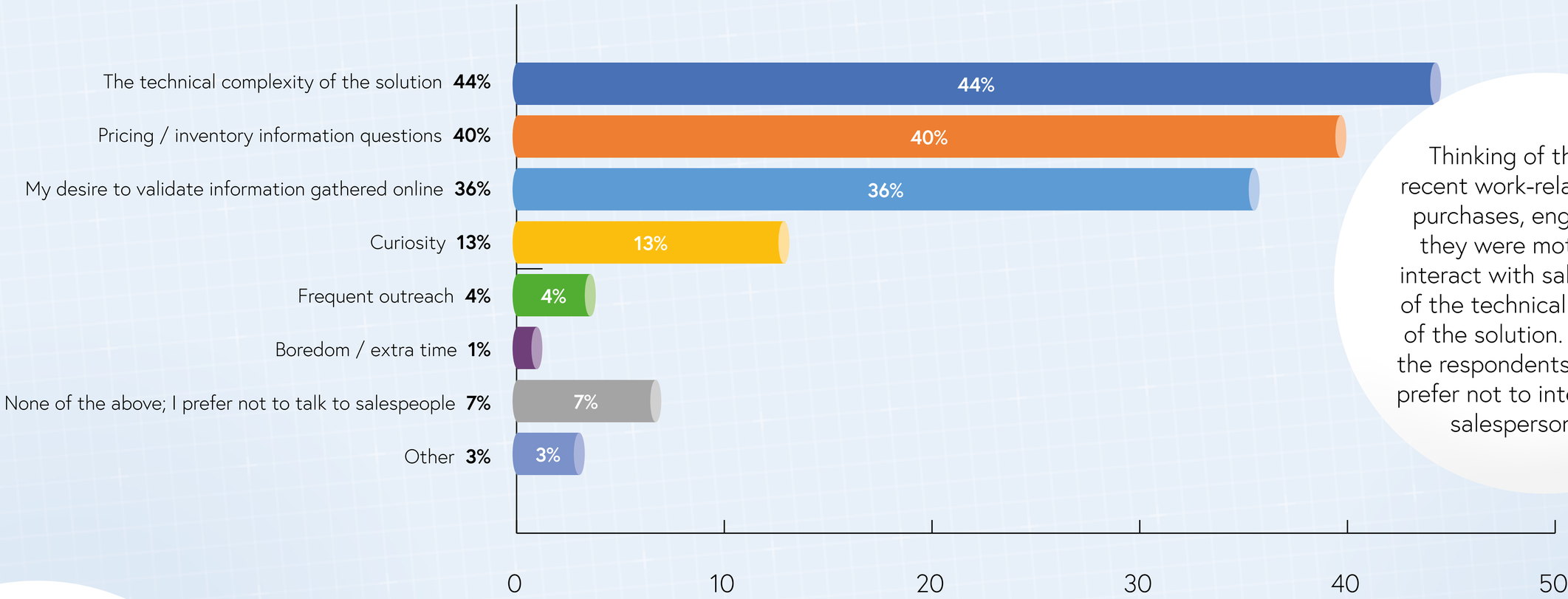
When you are ready to speak with a salesperson at a vendor company for the first time, which of the following is your preferred method of communication?

	Medium						
Age	Email	Phone	In-person meeting	Virtual meeting / video call	Online text / chat	LinkedIn direct messages	No preference
35 and under (n = 55)	62%	11%	13%	7%	5%	N/A	2%
36 – 45 (n = 135)	48%	21%	13%	14%	N/A	N/A	4%
46 – 55 (n = 224)	54%	17%	13%	8%	1%	2%	5%
56 – 65 (n = 420)	48%	27%	12%	6%	2%	1%	4%
66+ (n = 102)	44%	28%	19%	3%	N/A	N/A	6%

Interaction with sales (4)

Think about your most recent work-related vendor purchases and fill in the blank. _____ motivated me to interact with a salesperson for the first time. Multiple answers are possible.

n = 929

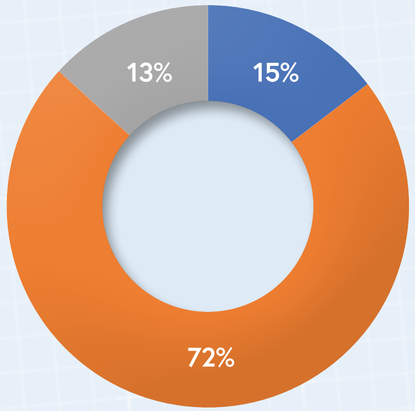


Thinking of their most recent work-related vendor purchases, engineers say they were motivated to interact with sales because of the technical complexity of the solution. Only **7%** of the respondents said they'd prefer not to interact with a salesperson at all.

Artificial Intelligence (1)

Are you regularly using AI-based tools for work?

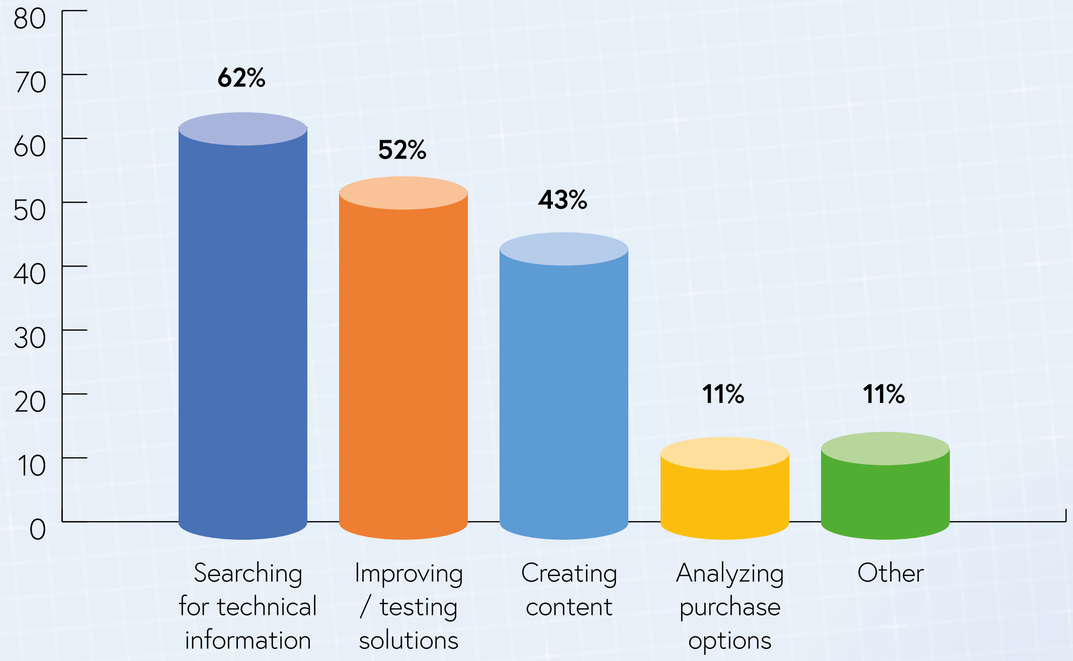
n = 1130



Yes **15%**
No **72%**
Not aware **13%**

How are you using AI-based tools for work? Multiple answers are possible.

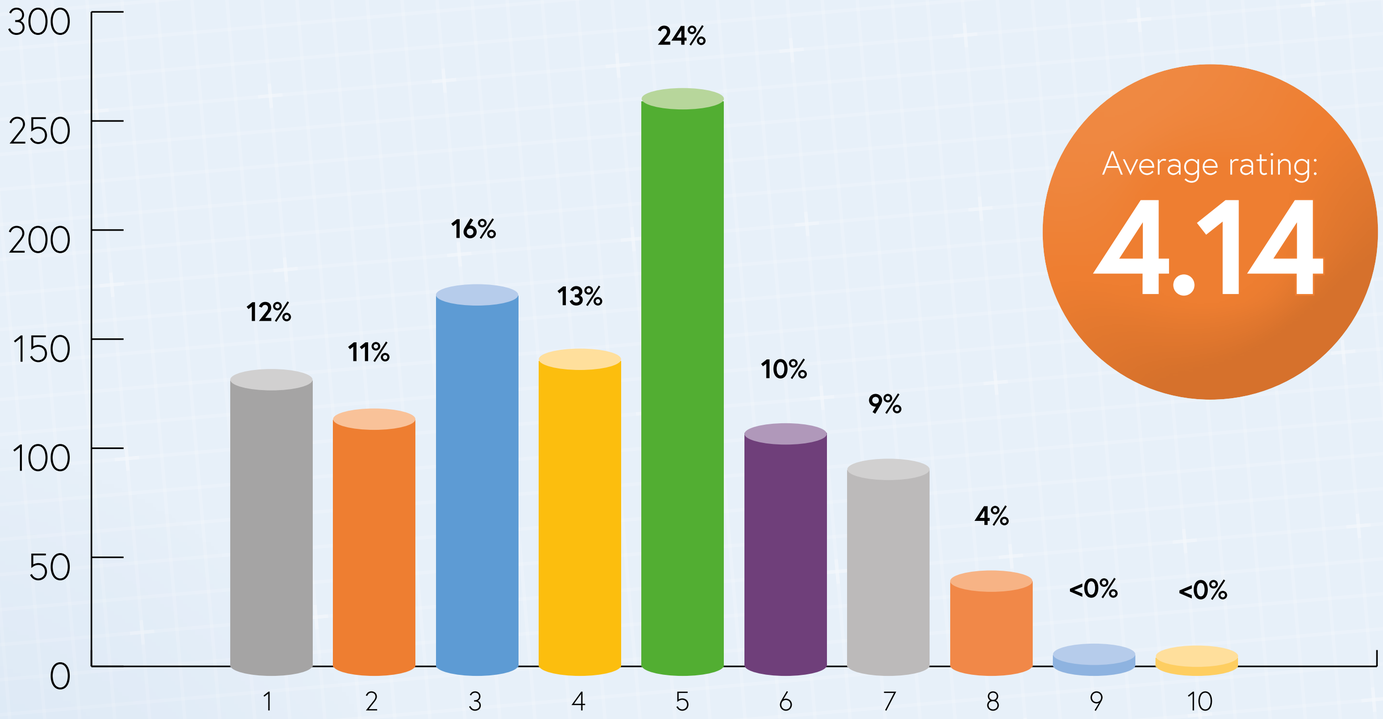
n = 178



Artificial Intelligence (2)

On a scale from 1 to 10, where 10 is complete trust, and 1 is a complete lack of trust, to what extent do you trust answers from AI-based tools?

n = 1058



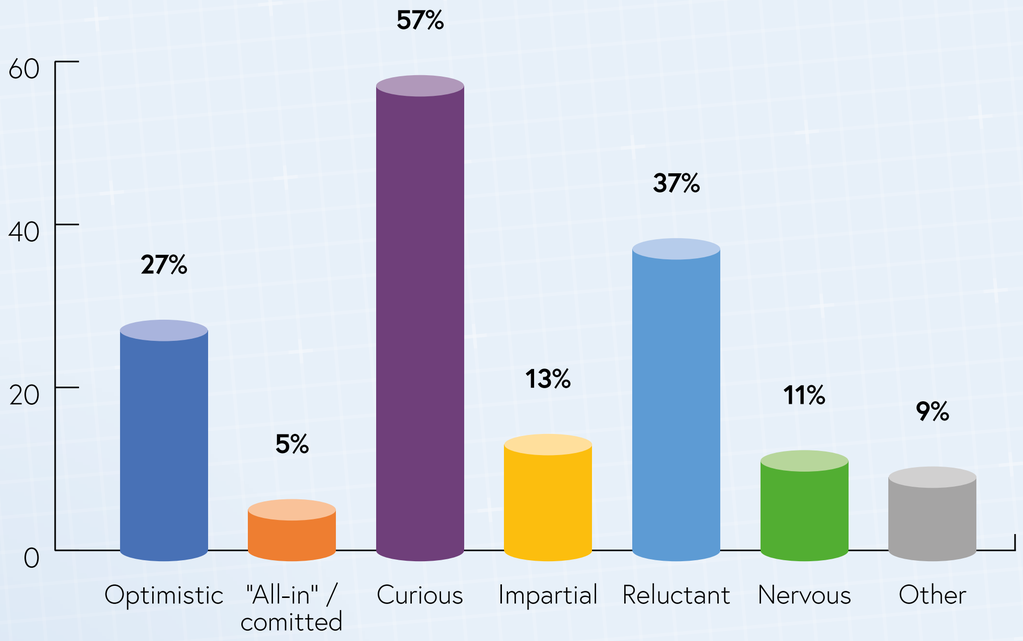
Average rating:
4.14

Technical buyers lack trust in answers from AI-based tools, with an average rating of **4.14**.

Artificial Intelligence (3)

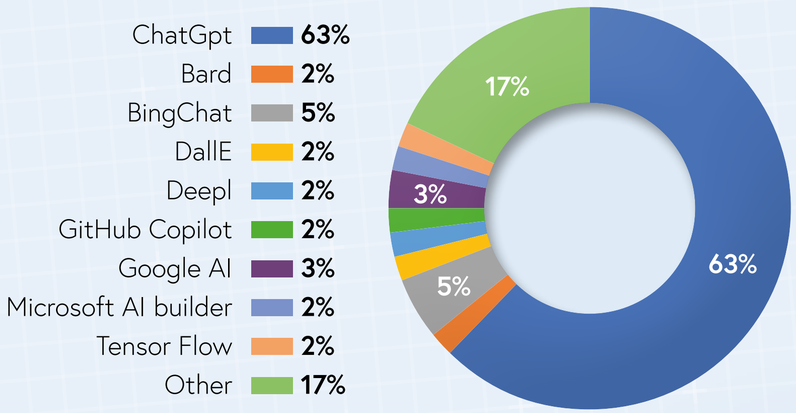
Which adjective(s) best describe how you feel about the future of AI-based tools? Multiple answers are possible.

n = 1118



Since the start of 2023, which AI-based tools are you using most often for work?

n = 156



About Elektor and TREW Marketing

TREW Marketing, founded and headquartered in Austin, Texas, is a strategy-first agency for engineering companies with highly complex, technical solutions. Driven by insightful research and unrivaled industry expertise, TREW builds marketing foundations with branding, drives engagement with content plans and marketing automation, and sustains growth through a targeted multi-channel approach.

For more information, visit **trewmarketing.com**.

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