FOUNDRY

Role and Influence of the Technology Decision-Maker 2024

How the role of the IT decision-maker continues to evolve as technology's responsibility in business increases

Purpose and methodology

Survey goal

To provide in-depth information about the evolving role and influence of IT decision-makers in today's corporations, especially as technology's role in business continues to increase. The research looks at who's involved in the tech purchase process, the amount of content they consume/download, and their top relied upon information sources.

Total respondents 938

Collection method
Online questionnaire

Number of questions 30

IT leadership

All survey respondents are involved in the purchase process for major IT or security products and services

Audience base

CIO, Computerworld, CSO, InfoWorld, and Network World email invitations to audience.
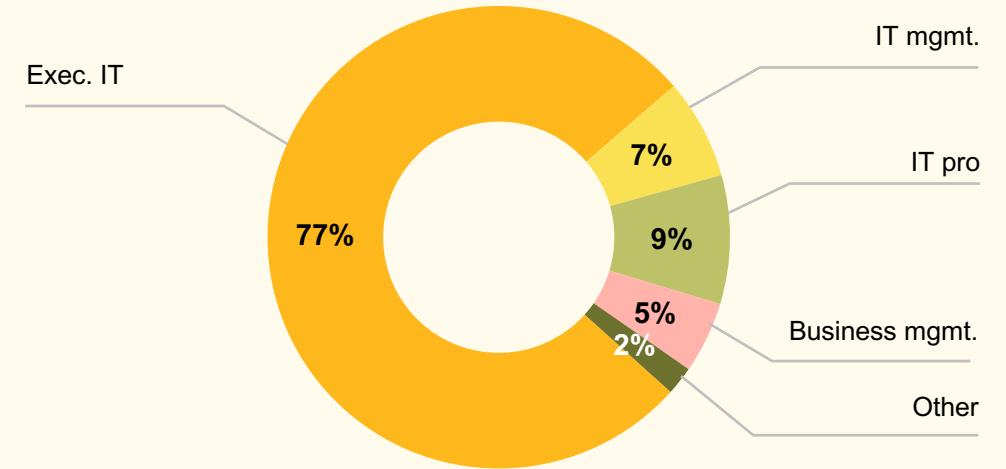
Geographic locations

The respondents represent a global perspective with 47% in North America, 15% in EMEA, and 36% in APAC

Average company size 17,252 employees

Generations
Baby Boomers: 16%
Gen X: 29%
Millennials: 22%
Gen Z: 23%

Job titles

Exec. IT 77%
IT mgmt. 7%
IT pro 9%
Business mgmt. 5%
Other 2%

Top represented industries

Industry	%
High Tech	21%
Manufacturing	12%
Education	10%
Financial Services	9%
Telecommunications & Utilities	8%
Advertising/Marketing/PR/Media	8%
Services (legal, consulting, real estate)	7%
Government/Nonprofit	7%
Healthcare	6%
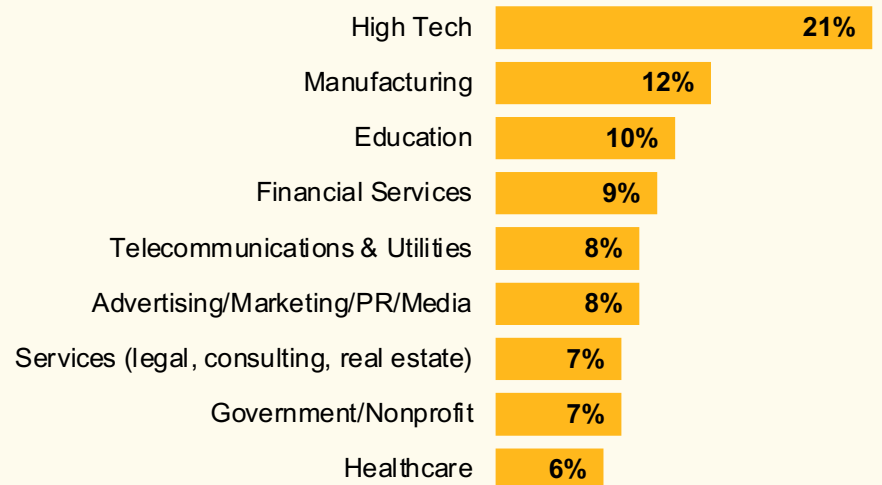
The technology purchase process is complex. To navigate it, you must:

1. Understand the influences behind tech purchases

2. Get to know the buying committee

3. Educate your customers

FOUNDRY

Landscape of the technology buying process

Purchase process complexity continues to manifest

65%

of IT decision-makers agree that the purchase process for technology products and services is becoming increasingly complex

Up from 61% in 2023

Why is it more complex?
Because more people are involved as business and IT leaders present and explore new technologies to efficiently run their companies.

The good news
To support these initiatives, tech budgets are increasing. 87% of ITDMs say their tech budgets will either increase or remain the same over the next 12 months.

Question: Please rate your level of agreement with the following statements: AND How do you expect your IT budget to change over the next 12 months compared to the past 12 months?

Increased automation is expected to accelerate tech purchase decisions over the next year

Increased automation — **53%**

Process changes — **37%**

Governance/compliance requirements — **32%**

LOB requests — **28%**

Re-organizations — **23%**

Mergers or acquisitions — **23%**

Internal skills shortages — **23%**

Changes in leadership — **22%**
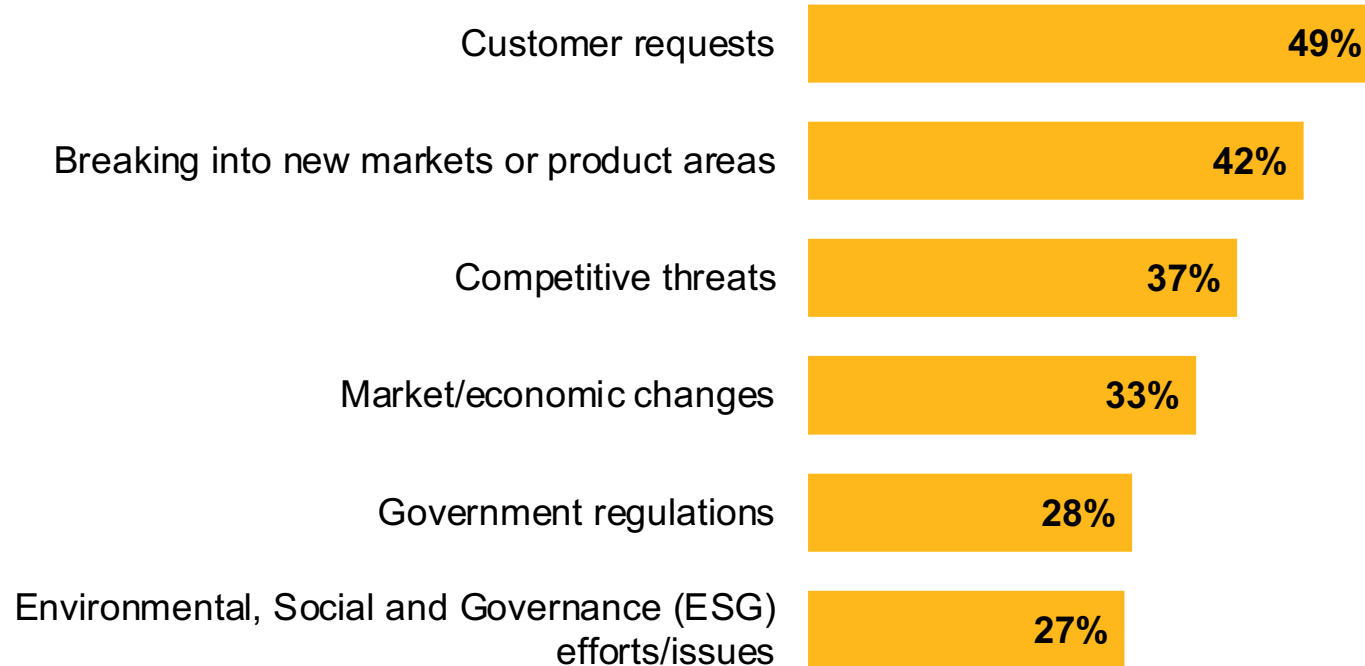
Changes in physical office space — **20%**
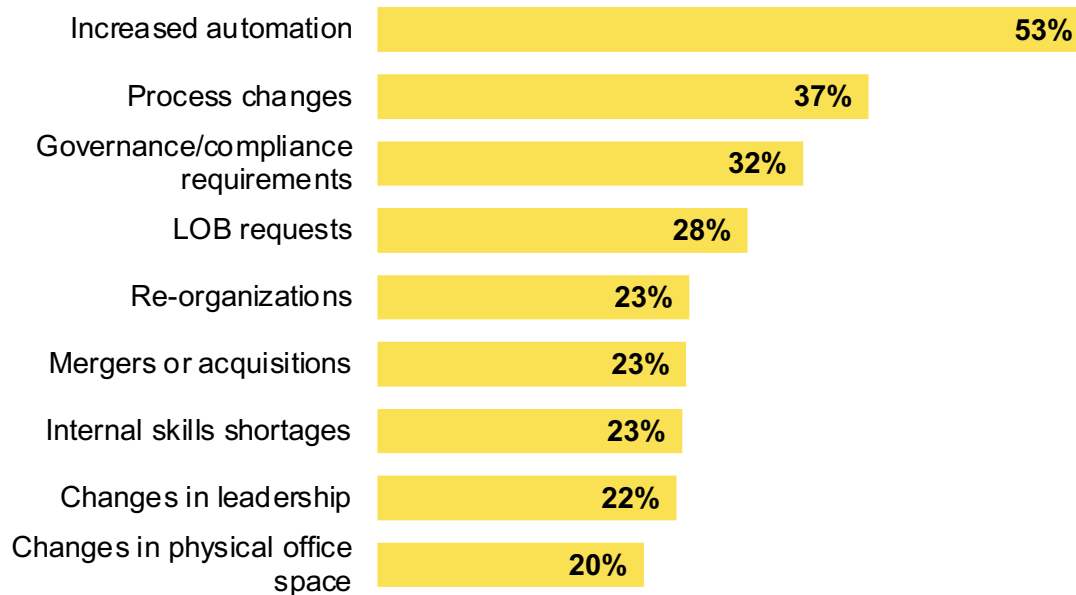
59%

of ITDMs expect AI to transform process automation at their organization over the next 12 months.

Source: CIO Tech Priorities: Tech Poll, 2024

Q: How will the following internal and external events influence technology purchase decisions over the next 12 months, if at all: < **Summary of Accelerator** >

External influences like customer requests are expected to accelerate tech purchases

Customer requests	**49%**
Breaking into new markets or product areas	**42%**
Competitive threats	**37%**
Market/economic changes	**33%**
Government regulations	**28%**
Environmental, Social and Governance (ESG) efforts/issues	**27%**

According to the 2024 State of the CIO research, **improving the customer experience** and **capitalizing on emerging technology opportunities** are in the top five business initiatives driving IT investment in 2024.

Source: State of the CIO, 2024

Q: How will the following internal and external events influence technology purchase decisions over the next 12 months, if at all: < **Summary of Accelerator** >

The length of the entire buying cycle takes at least half a year

6.1 months

is the average length of the tech purchase process

NA	5.9 months
EMEA	5.2 months
APAC	7 months

Category	Percentage
Less than 1 month	10%
1 to less than 3 months	19%
3 to less than 6 months	23%
6 to less than 8 months	16%
8 to less than 12 months	11%
12 months or more	20%

NA	17%
EMEA	15%
APAC	28%

Q: On average, what do you anticipate will be the length of the buying cycle for each purchase?

FOUNDRY
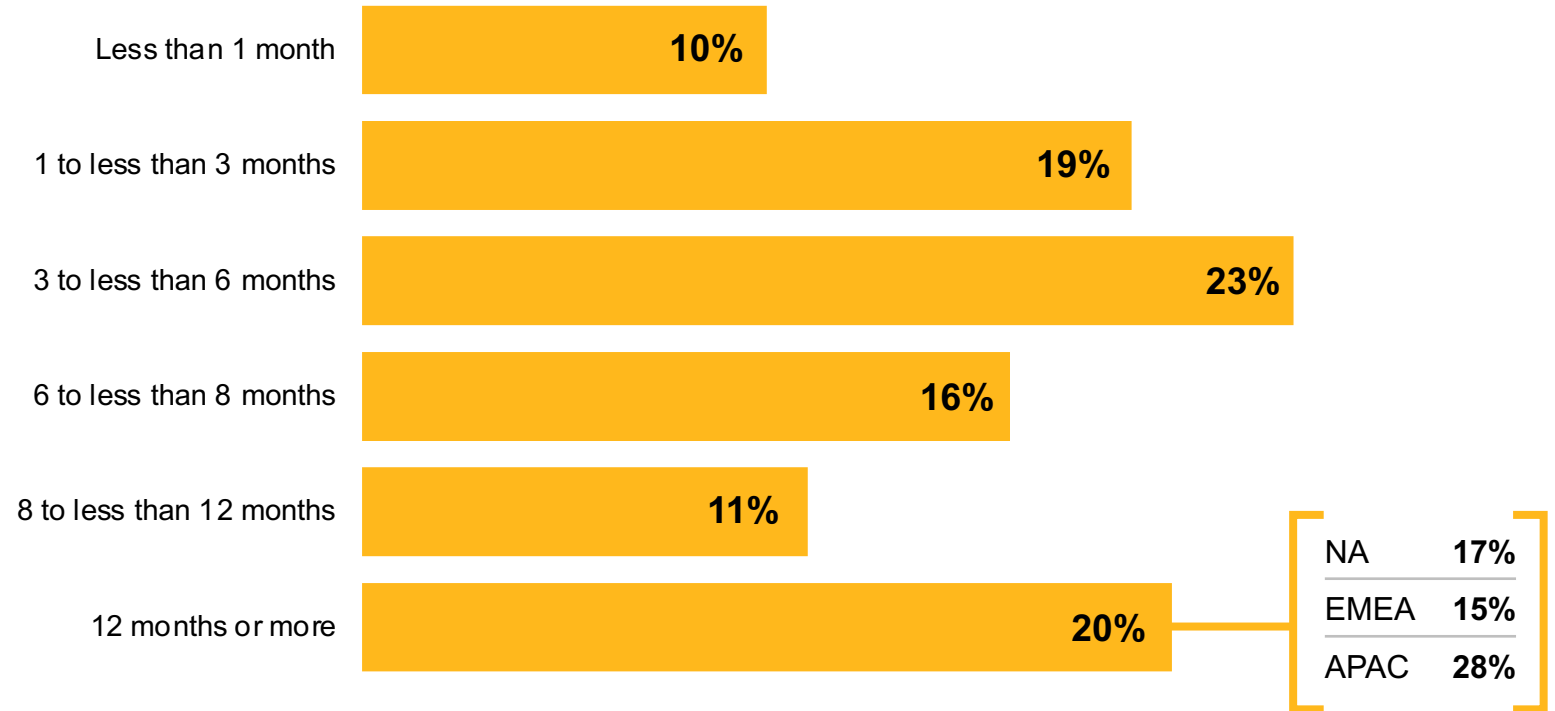
More voices continue to be added to the buying team

28
average number
of influencers

2023 average: **25**
2022 average: **20**

	IT average	LOB average
Overall	**15**	**13**
NA	**13**	**12**
EMEA	**14**	**14**
APAC	**17**	**14**
1,000+	**17**	**15**
<1,000	**12**	**10**

Q: Please estimate the total number of people (including yourself), on average, involved in influencing enterprise technology purchases within your organization:

	IT	LOB	Total
Edge computing & services	22	17	**39**
IT services	17	15	**32**
Enterprise software/applications	16	14	**30**
Internet of Things	17	13	**30**
Data & analytics	15	14	**29**
Cloud Computing	15	13	**28**
Security	15	13	**28**
Telecommunications	16	12	**28**
Artificial Intelligence	15	12	**27**
Networking	15	12	**27**
Management tools	15	12	**27**
Mobile applications	14	13	**27**
Cloud database	13	13	**26**
Servers/storage	13	11	**24**
Web applications	13	11	**24**
Collaboration tools	12	11	**23**
Desktops/laptops	11	10	**21**

Executive leadership is becoming more involved

Role	Percentage
CIO or top IT executive	23%
CEO	20%
IT/networking management	18%
CTO	17%
CFO	16%
CSO/CISO or top security executive	15%
Chief Data Officer or equivalent	14%
Architect	14%
COO	14%
Engineer	13%
Line of business management	13%
Business relationship manager	13%
Chief AI officer	13%
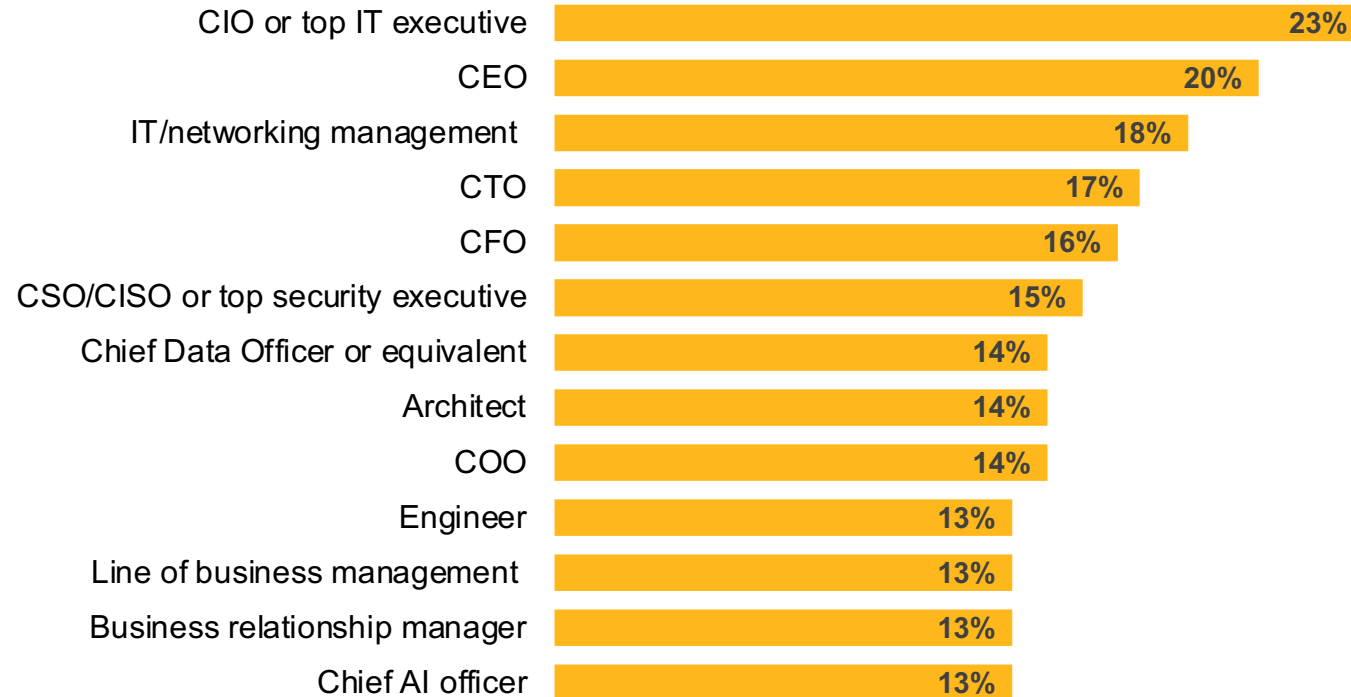
52%

of IT decision-makers say that their organization is adding AI specific roles who are increasingly involved in technology purchase decisions

Q: Of the individuals you selected who are involved in the technology purchase process, which have recently become involved and which ones have become more involved in the past 12 months: AND Please rate your level of agreement with the following statements: < Our organization is adding AI specific roles who are increasingly involved in technology purchase decisions >

IT executives lead each stage with support from specialists

	Determine the business need	Determine technical requirements	Evaluate products or services	Recommend and select vendors	Sell internally	Authorize and approve	Post-sales engagement
CEO	37%	15%	16%	16%	17%	36%	14%
CIO or top IT executive	34%	33%	32%	36%	32%	37%	28%
IT/networking management	28%	34%	32%	29%	23%	23%	24%
CSO/CISO or top security executive	23%	22%	22%	19%	16%	20%	14%
Line of business management	22%	17%	22%	18%	17%	16%	19%
Business relationship manager	22%	14%	17%	16%	17%	12%	17%
CFO	21%	10%	12%	13%	15%	31%	10%
CTO	21%	24%	23%	23%	21%	20%	19%
COO	21%	12%	14%	13%	16%	20%	12%
Chief Data Officer or equivalent	19%	20%	22%	20%	18%	17%	18%
CMO or top marketing executive	19%	12%	14%	14%	14%	15%	13%
Chief Digital Officer or equivalent	19%	18%	17%	19%	15%	17%	14%
IT/networking staff	18%	29%	27%	18%	12%	7%	23%
Security management	16%	24%	23%	19%	15%	17%	16%
Engineer	16%	25%	26%	16%	8%	4%	18%
Architect	16%	26%	25%	18%	11%	5%	17%
Software Engineer/Developer	15%	23%	24%	15%	10%	7%	18%
Data scientist	15%	20%	19%	15%	12%	7%	15%
Chief AI officer	14%	17%	16%	13%	11%	8%	12%
Security Staff	11%	18%	17%	12%	7%	6%	15%

Question: Including yourself, which of the following groups will be involved in each stage of the IT purchase process at your organization over the next 12 months?

Source: Foundry Role & Influence of the Technology Decision-Maker Survey, 2024

FOUNDRY

Vendors play a larger role than just the sale

Advancing through the purchase process with help from vendors

48%
will seek a new vendor for tech purchases – mostly due to innovation, business need and cost

65%
work with vendors to help them develop the business case around their investment in the technology

68%
say that when all stakeholders are aware of a brand it makes the internal sell through process easier

Question: For each purchase, please indicate whether you sought or will seek a new vendor or purchase from an existing vendor: AND Please rate your level of agreement with the following statements:

Innovation continues to attract customers

Category	Percentage
New vendor/product is more innovative or feature rich	39%
Current product/service no longer met our business needs	34%
Increased cost/level of investment required by current vendor	29%
New initiative or request from Line of Business executives	28%
Poor customer service	27%
Current product/service did not meet our security requirements	26%
Current product/service did not align with our digital transformation efforts	24%
Shift in economic conditions	22%
We have never purchased this type of product or service before	21%
Recommendation from a peer outside your company	19%
Metrics in service level agreement were not being met	18%
Our IT team does not have the skills necessary to work with current product/service	17%
Current vendor no longer seems financially stable	17%

Question: What would prompt you to seek a new vendor for any technology purchase?

Source: Foundry Role & Influence of the Technology Decision-Maker Survey, 2024

Early purchase process stages most likely to stall and require vendor assistance

Legend:
- Most likely to stall
- Need vendor assistance

Average # of sources needed

Stage	Most likely to stall	Need vendor assistance	Average # of sources needed
Determine the business need	37%	27%	5.7
Determine technical requirements	33%	43%	5.7
Evaluate products and services	37%	46%	**6.4**
Recommend or select vendors	24%	25%	5.5
Sell internally	29%	21%	4.6
Authorize or approve	29%	16%	3.8
Post sales engagement		27%	4

Question: Considering major enterprise IT purchases, which of the following information sources are used at each stage of the purchase process in which you are involved? **Question:** During which stage(s) of the process are technology purchases most likely to stall at your organization? **Question:** During which stage(s) of the process are you most likely to need additional resources or assistance from a vendor?

Source: Foundry Role & Influence of the Technology Decision-Maker Survey, 2024

Vendor assistance is needed within the evaluation stage

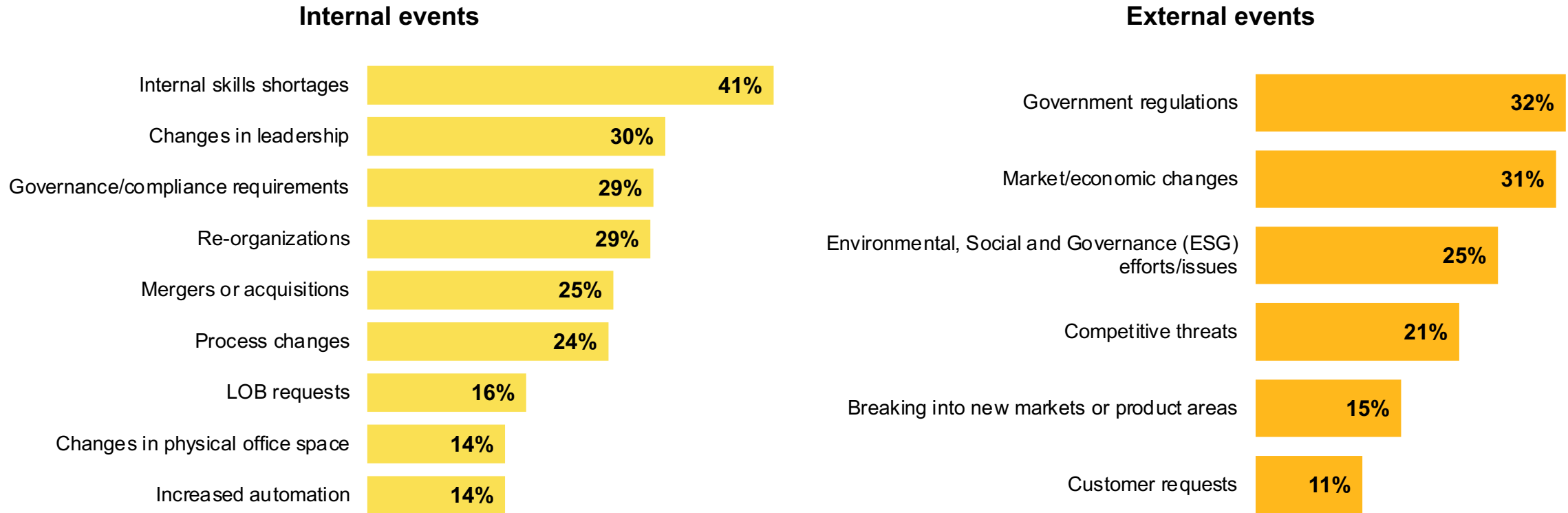|	Average number of sources of information used by stage		Stage(s) of the process most likely to stall		Stage(s) of the process you need additional resources or assistance from a vendor	
	<1,000	**1,000+**	**<1,000**	**1,000+**	**<1,000**	**1,000+**
Determine the business need	5.6	5.8	34%	39%	26%	29%
Determine technical requirements	5.2	6	27%	38%	43%	45%
Evaluate products/services	5.9	6.9	35%	39%	46%	47%
Recommend or select vendors for purchase	5.1	6	20%	29%	20%	30%
Sell internally (e.g., outside of the IT team)	4.3	4.8	24%	34%	19%	23%
Authorize or approve the purchase of products and services	3.4	4.1	27%	30%	15%	17%
Post sales engagement (e.g., adoption, maintenance, renewals, additions)	3.6	4.4	--	--	25%	28%

Question: Considering major enterprise IT purchases, which of the following information sources are used at each stage of the purchase process in which you are involved? **Question:** During which stage(s) of the process are technology purchases most likely to stall at your organization? **Question:** During which stage(s) of the process are you most likely to need additional resources or assistance from a vendor?

Skills shortages, along with internal and external changes contributing to stalling

Internal events

Internal skills shortages	41%
Changes in leadership	30%
Governance/compliance requirements	29%
Re-organizations	29%
Mergers or acquisitions	25%
Process changes	24%
LOB requests	16%
Changes in physical office space	14%
Increased automation	14%

External events

Government regulations	32%
Market/economic changes	31%
Environmental, Social and Governance (ESG) efforts/issues	25%
Competitive threats	21%
Breaking into new markets or product areas	15%
Customer requests	11%

Q: How will the following internal and external events influence technology purchase decisions over the next 12 months, if at all: <**Summary of Barrier** >

Vendor assistance is needed as ITDMs expect internal barriers to tech purchase decisions

41%
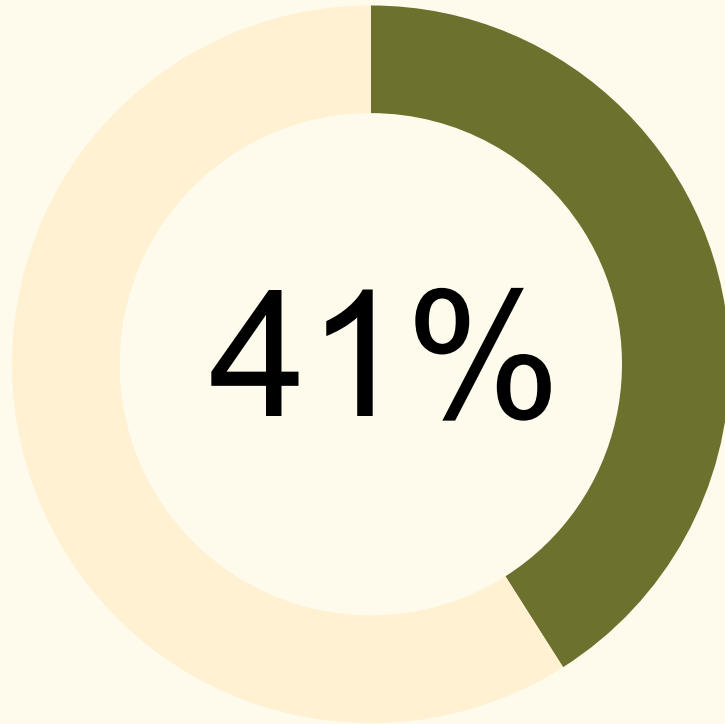
of ITDMs expect that **internal skills shortages** will be a **barrier** to tech purchase decisions over the next 12 months

Other internal barriers to tech purchase decisions:
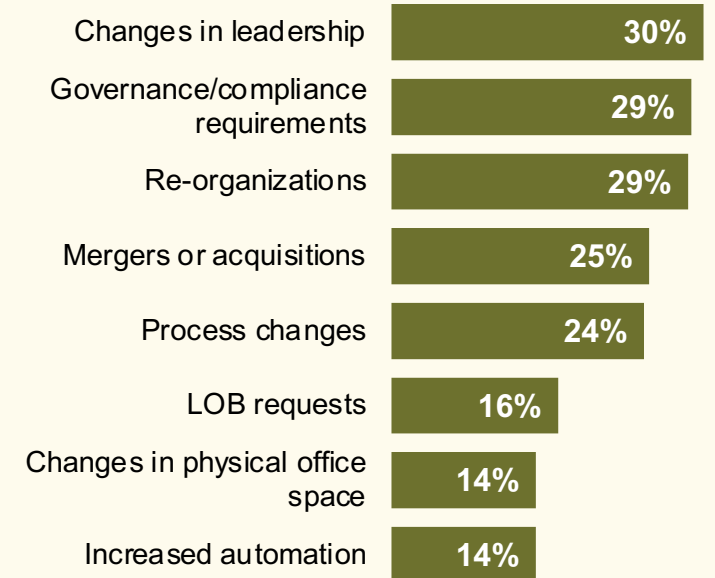
Barrier	Percentage
Changes in leadership	30%
Governance/compliance requirements	29%
Re-organizations	29%
Mergers or acquisitions	25%
Process changes	24%
LOB requests	16%
Changes in physical office space	14%
Increased automation	14%

Q: How will the following internal events influence technology purchase decisions over the next 12 months, if at all: <**Summary of Barrier** >

FOUNDRY

Educating your customers

Trust is a necessary component to content engagement

74%

of ITDMs are more likely to consume content from trusted brands

63%

of ITDMs are more likely to trust information read online if it was a recommendation from a peer

Question: Please rate your level of agreement with the following statements:

ITDMs download white papers, reports, briefs, etc. to aid them in the purchase process

7

pieces of content is the average amount downloaded during the purchase process
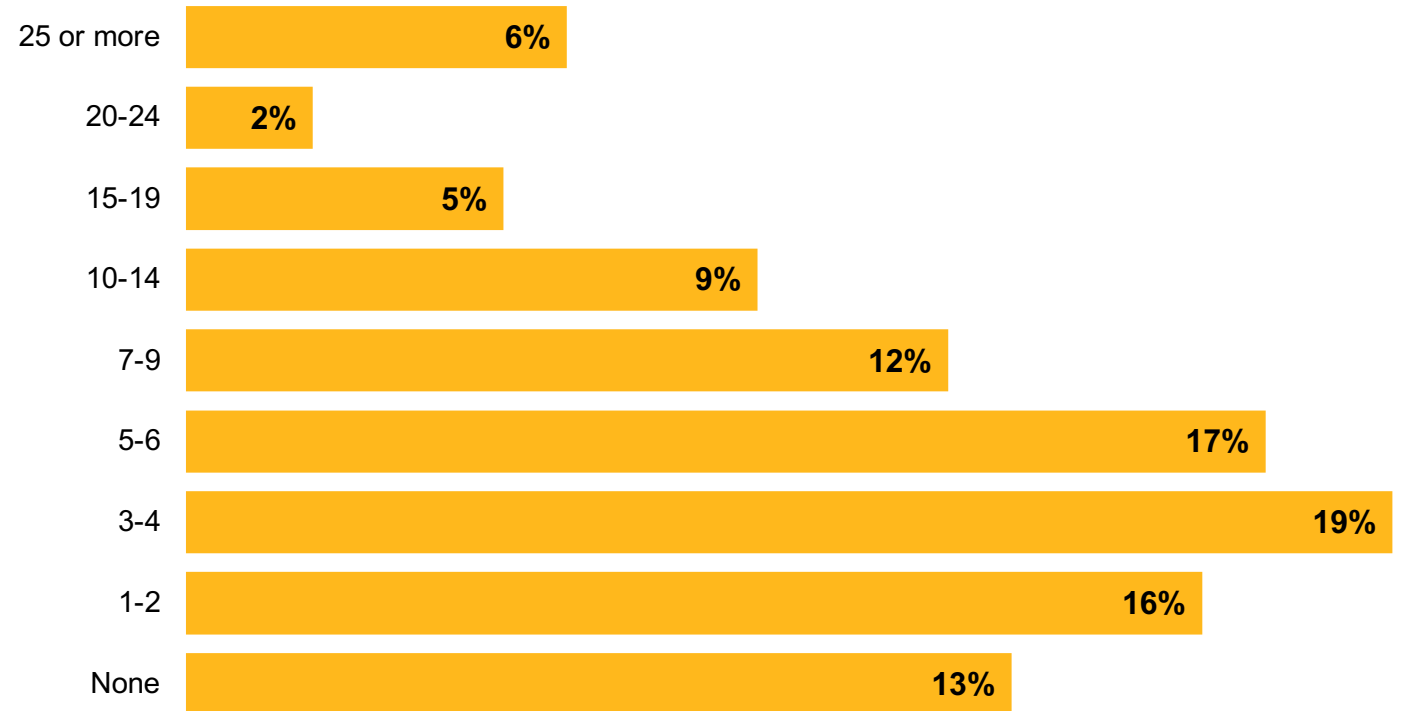
Downloads	Percentage
25 or more	6%
20-24	2%
15-19	5%
10-14	9%
7-9	12%
5-6	17%
3-4	19%
1-2	16%
None	13%

Question: Approximately, how many pieces of information (i.e., white papers, research reports, project briefs) did you download to aid you in the purchase process?

FOUNDRY

Technology content sites and vendors are prime sources of information

Determine the business need	Determine technical requirements	Evaluate products and services	Recommend or select vendors	Sell internally	Approve and authorize purchase	Post-sales engagement
Technology content sites	Technology vendors (in-person)	Technology vendors (via vendor web site)	Technology vendors (via vendor web site)	Peers inside your company	Peers inside your company	Technology vendors (via phone, email, video conference)
Peers inside your company	Technology vendors (via vendor web site)	Technology vendors (in-person)	Technology vendors (in-person)	Technology content sites	Technology vendors (in-person)	Technology vendors (in-person)
Analyst firms	Peers inside your company	Technology vendors (via phone, email, video conference)	Technology vendors (via phone, email, video conference)	Third-party market research	Technology vendors (via phone, email, video conference)	Technology vendors (via vendor web site)
Business content sites	Technology vendors (via phone, email, video conference)	Technology content sites	Peers inside your company	Technology vendors (via phone, email, video conference)	Technology content sites	Peers inside your company
Technology vendors (via vendor web site)	Technology content sites	Analyst firms	Peers outside your company (via phone, email, video conference)	Technology vendors (in-person)	Analyst firms	Peers outside your company (via phone, email, video conference)
						Technology vendors (via social/business networking sites)

Question: Which of the following information sources do you use at each stage of the purchase process in which you are involved:

FOUNDRY

Mix of research, meetings and content are most helpful as complexity increases

1
Analyst firms

2
Technology content sites

3
In-person meetings with vendors

Third party market research

4
Vendor meetings via phone, email, video conference

5
White papers

Question: Of those you selected, which information sources are typically the most helpful in making a technology purchase decision?

Value of tech content sites measured by credibility and clarity; brand reputation rises to top for vendor sites

Tech content sites

Factor	Value
Credibility	41%
Clarity of information	38%
Relevancy	36%
Easily searchable and accessible information	30%
Brand reputation	30%
Currency (up-to-date)	29%
Peer referrals	22%
Association with tech influencers	19%

Vendor content sites

Factor	Value
Clarity of information	35%
Easily searchable and accessible information	34%
Brand reputation	34%
Credibility	30%
Relevancy	29%
Currency (up-to-date)	29%
Peer referrals	23%
Association with tech influencers	15%

72%
of ITDMs agree that tech vendor reputation is one of the top factors they consider when making purchase decisions

Q: When searching for tech-related information, how do you measure the value of the following content sites? Q: Please rate your level of agreement with the following statements: < Technology vendor reputation is one of the top factors I consider when making purchase decisions >

ITDMs rely on social channels to be effective in their roles

	Boomers	Gen X	Millennials	Gen Z
YouTube 72%	76%	69%	**69%**	**80%**
LinkedIn 58%	**80%**	**83%**	42%	45%
Instagram 51%	28%	29%	51%	71%
Facebook 46%	44%	38%	51%	54%
X, formerly Twitter 42%	28%	40%	39%	50%
TikTok 35%	16%	7%	38%	56%
Reddit 26%	28%	28%	21%	30%
Threads 21%	20%	12%	15%	30%

Q: Which social media channels do you rely on to be effective in your role?

FOUNDRY

Video content is a powerful way to reach all buyers

95%
of ITDMs watch technology-related videos for business purposes

Boomers	92%
Gen X	96%
Millennials	99%
Gen Z	98%
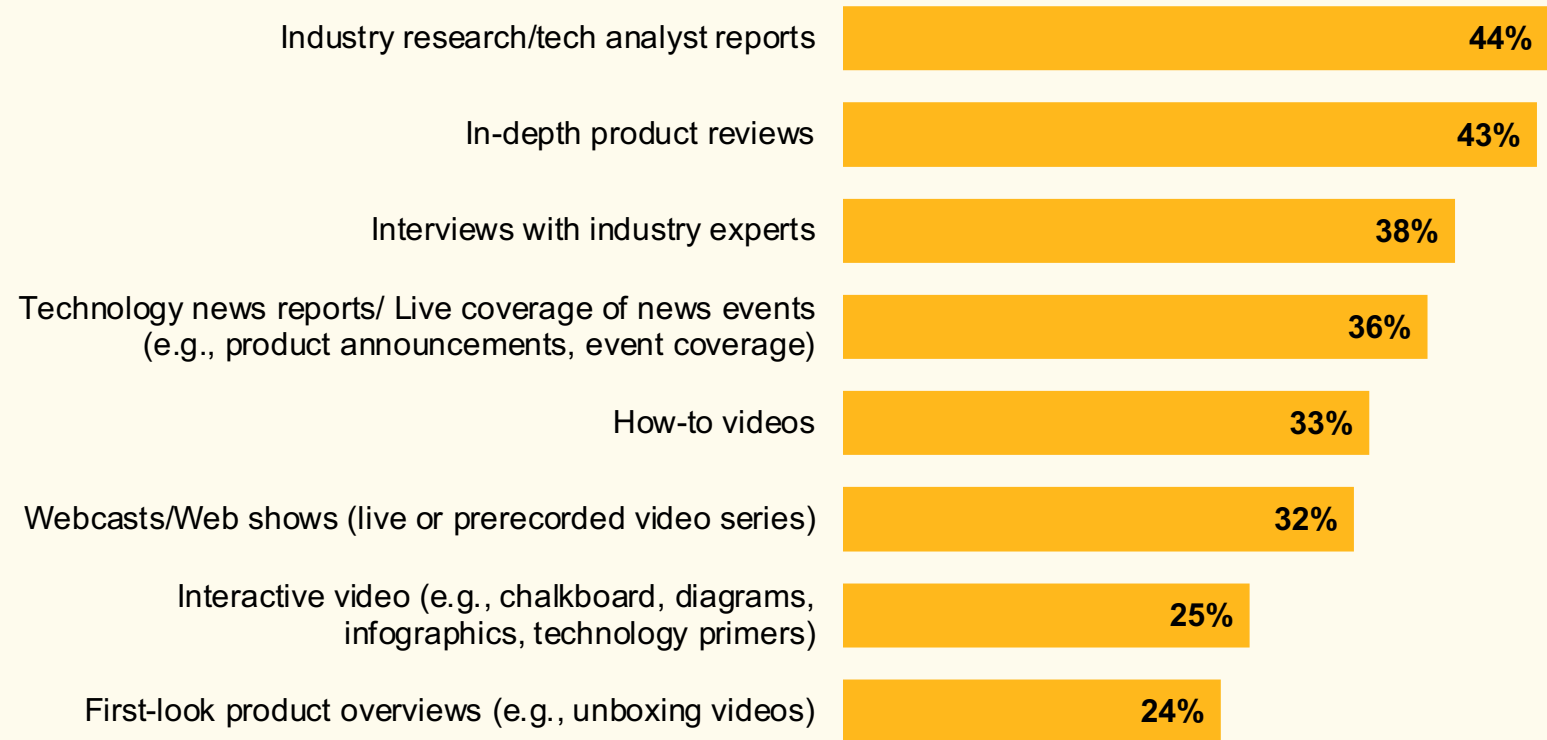
Category	Percentage
Industry research/tech analyst reports	44%
In-depth product reviews	43%
Interviews with industry experts	38%
Technology news reports/ Live coverage of news events (e.g., product announcements, event coverage)	36%
How-to videos	33%
Webcasts/Web shows (live or prerecorded video series)	32%
Interactive video (e.g., chalkboard, diagrams, infographics, technology primers)	25%
First-look product overviews (e.g., unboxing videos)	24%

Q: Have you listened to a business-related podcast in the past 12 months? Q: What were your top 2 reasons for listening to a business-related podcast?

Work-related webcasts are preferred among older generations

64%
of IT decision-makers have registered for a **live webcast** in the past 12 months for work-related purposes

Boomers	**77%**
Gen X	**70%**
Millennials	**55%**
Gen Z	**54%**

65%
of IT decision-makers have watched an **on-demand webcast** in the past 12 months for work-related purposes

Boomers	**67%**
Gen X	**74%**
Millennials	**67%**
Gen Z	**59%**

Q: Have you registered for a live webcast in the past 12 months for work-related purposes? Q: Have you watched an on-demand webcast in the past 12 months for work-related purposes?

FOUNDRY

Podcasts strongly preferred among younger generation

61%
of ITDMs have listened to a business-related podcast in the past year

Boomers	**60%**
Gen X	**58%**
Millennials	**60%**
Gen Z	**73%**

To find out about emerging/new technology **46%**

Business trends **37%**

Breaking/recent technology or industry news **32%**

Thought leadership (e.g., "Executive series") **27%**

Stories about real-life experiences **24%**

Panel discussions around a topic **19%**
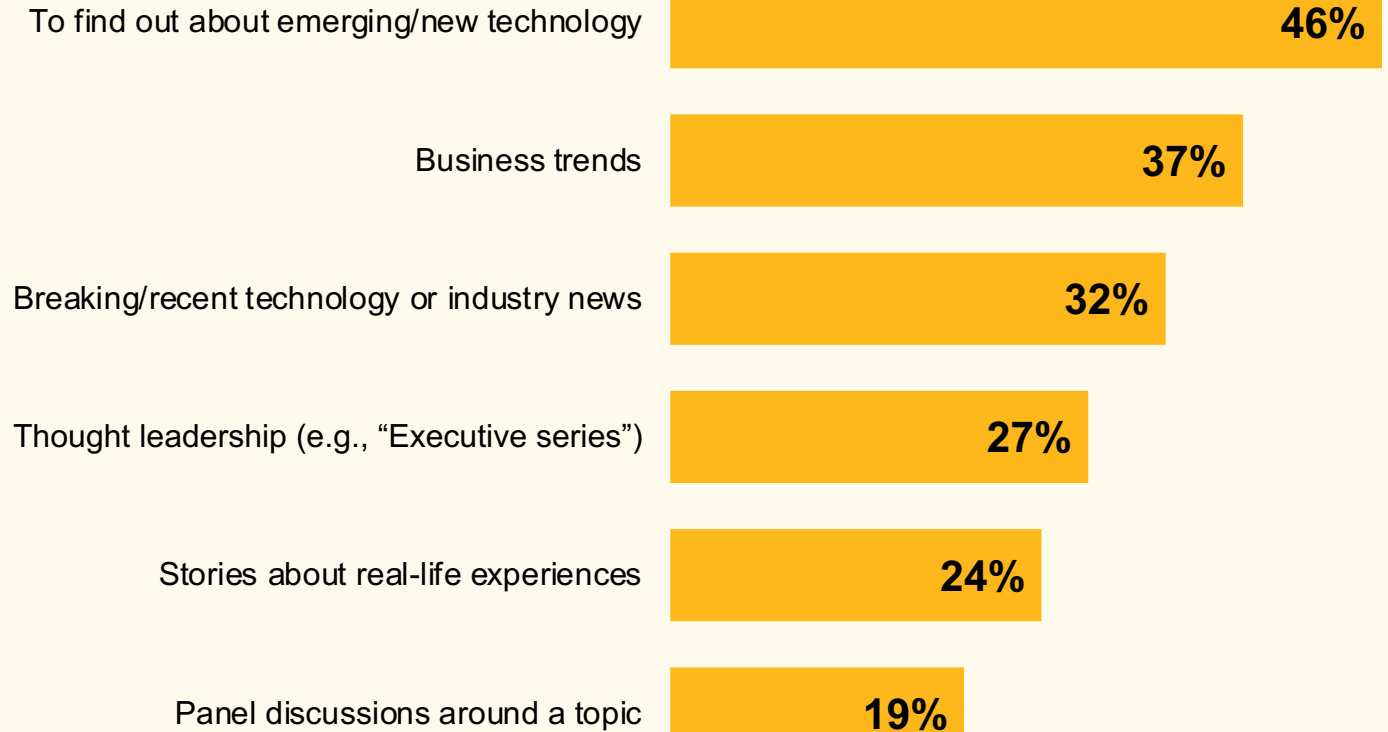
Q: Have you listened to a business-related podcast in the past 12 months? Q: What were your top 2 reasons for listening to a business-related podcast?

Key takeaways

Understand the influences behind tech purchases

- The purchase process is becoming more complex and provides a prime opportunity for vendors to help their customers.
- The purchase process is getting longer (6.1 months), and the number of people influencing the process is increasing (28).

Get to know the buying committee

- Determine who your ICP is based on who is involved in the purchase for your specific technology areas and create a roadmap to engage them with resources that help at those specific stages based on region, age, company size, etc., so that you engage the right people, at the right time, via the right channels.

Educate your customers every step of the way

- The purchase process has a high propensity to stall in various stages, but vendors can help most in the evaluation stage and provide resources to help customers evaluate solutions, make the business case for investments in technology and sell it through in their organizations.
- Your customers need help in navigating this process, and those who provide educational resources at the right stage have a better chance of winning business.

FOUNDRY

Demographics

Industry

Industry	Percentage
High Tech	21%
Manufacturing (including automotive, aerospace & defense, construction, engineering, chemical, metals & mining)	12%
Education	10%
Financial Services (banking, insurance, brokerage)	9%
Telecommunications & Utilities	8%
Advertising/Marketing/PR/Media (publishing broadcast online)	8%
Services (legal, consulting, real estate)	7%
Government/Nonprofit	7%
Healthcare (providers and pharmaceuticals)	6%
Retail, Wholesale and Distribution	5%
Transportation (airlines, trucking, railroads, shipping, logistics)	2%
Travel and Leisure (cruise lines, hotels, theme parks, casinos)	1%
Other	5%

Question: Which of the following best describes your organization's industry or function?

Job titles

Job Title	Percentage
IT Staff	11%
CIO (Chief Information Officer) or top IT executive	11%
CEO, Chairman, President	7%
Manager	7%
Systems Integrator	7%
CTO	6%
Director	6%
Application/Software Developer	5%
Director, Manager	4%
Architect	4%
Data Scientist	3%
CSO, CISO	3%
Network Staff	2%
VP	2%
Engineer	2%
Chief Data Officer or equivalent	2%
Technical Consultant	2%
Security Staff	2%
Chief Digital Officer or equivalent	2%
Executive VP, Senior VP, VP	1%
COO, General Manager, Executive Director, Managing Director	1%
Chief Marketing Officer (CMO) or top marketing executive	1%
Executive VP, Senior VP	1%
Chief AI Officer or equivalent	1%
Supervisor	1%
Other Corporate, Business Manager	1%
CFO, Controller, Treasurer	1%

Question: What is your primary job title?

FOUNDRY

Company size, budget, and revenue

17,252
Average company size
(number of employees)

$391M
Average annual IT budget

91%
of ITDMs say their
revenuewill either increase
or remain the same over
the next 12 months

Increase

Decrease

55%

9%

36%

**Remain
the same**
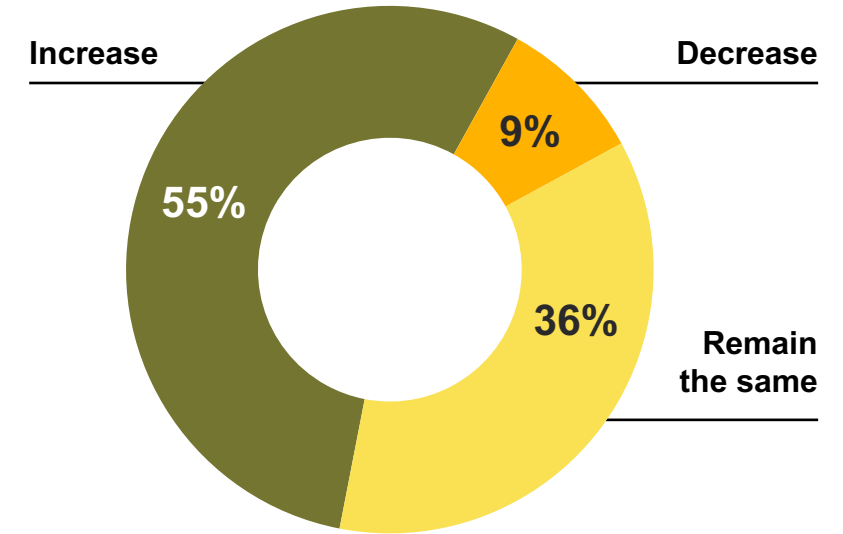
Question: Approximately how many people are employed in your entire organization or enterprise? (Please include all plants, divisions, branches, parents and subsidiaries worldwide.)
Question: Please estimate your entire organization's total annual budget for all information technology products, systems, services and/or staff in the next 12 months.

FOUNDRY

Appendix: Company size and regions

Technology budgets hold steady and show growth

87%

of ITDMs say their tech budgets will either increase or remain the same over the next 12 months

Q: How do you expect your IT budget to change over the next 12 months compared to the past 12 months?

Increase

1,000+	**47%**
<1,000	**47%**
NA	**47%**
EMEA	**53%**
APAC	**47%**

Decrease

1,000+	**16%**
<1,000	**11%**
NA	**13%**
EMEA	**19%**
APAC	**11%**

Remain the same

1,000+	**37%**
<1,000	**42%**
NA	**40%**
EMEA	**28%**
APAC	**42%**

13%

40%

47%

The purchase process is becoming increasingly complex

65%
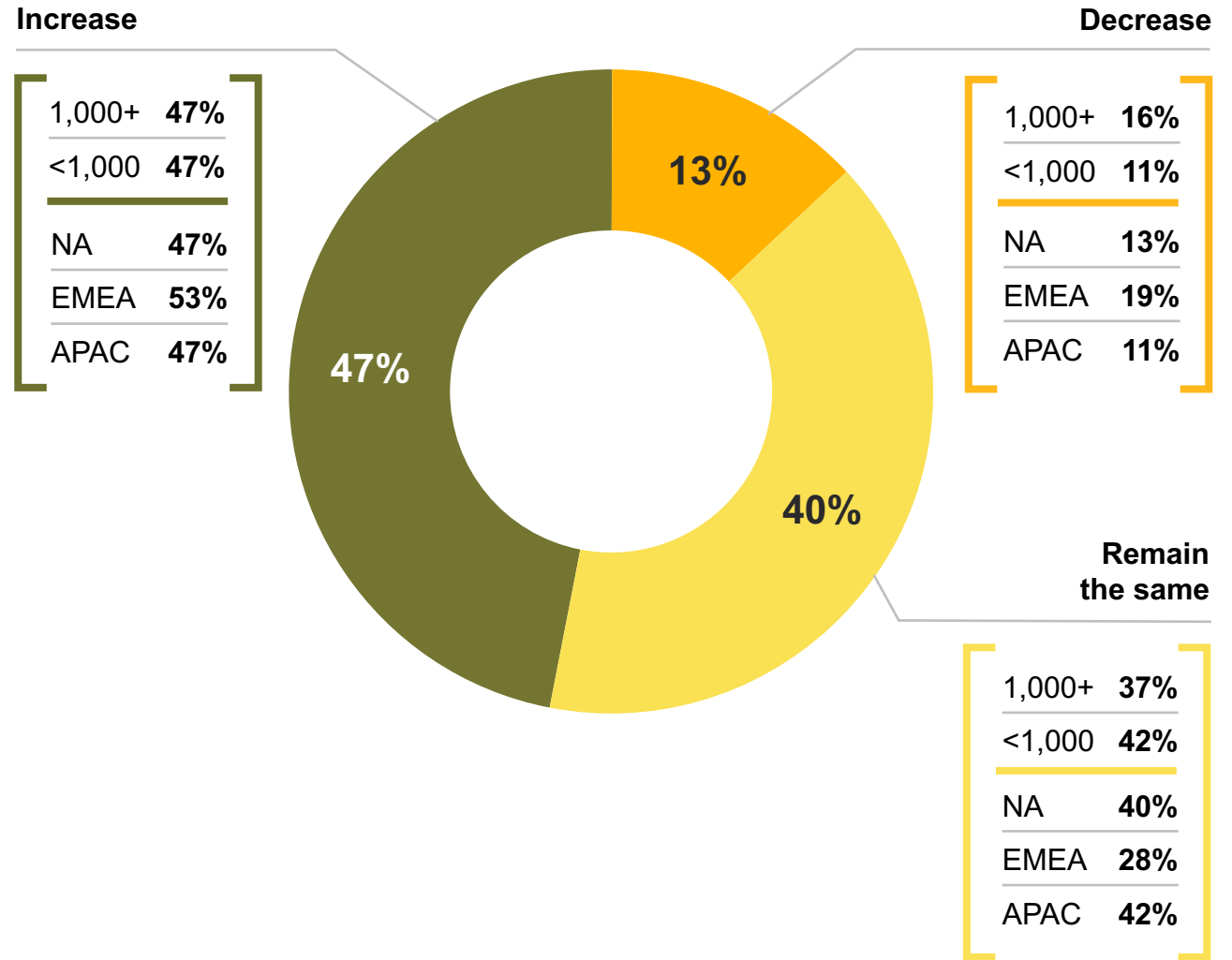
agree that the purchase process for technology products and services is becoming increasingly complex

1,000+	**67%**
<1,000	**63%**
NA	**67%**
EMEA	**58%**
APAC	**66%**

Executive IT	**64%**
Mid-level IT	**71%**
IT professional	**64%**
Business mgmt.	**71%**

Baby Boomers	**66%**
Gen X	**69%**
Millennials	**64%**
Gen Z	**61%**

Question: Please rate your level of agreement with the following statements:

The purchase process is becoming increasingly complex

65%

agree that the purchase process for technology products and services is becoming increasingly complex

28

average number of influencers

IT: **15** LOB: **13**

2023 average: **25**
2022 average: **20**

6.1 months

is the average length of the tech purchase process

Question: Please rate your level of agreement with the following statements:

Average length of the buying cycle shorter for younger generations

6.1 months
is the average length of the tech purchase process

Boomers	**6.5 months**
Gen X	**6.7 months**
Millennials	**5.9 months**
Gen Z	**5.1 months**

		Boomers	Gen X	Millennials	Gen Z
Less than 1 month	**10%**	10%	6%	9%	16%
1 to less than 3 months	**19%**	17%	16%	21%	24%
3 to less than 6 months	**23%**	22%	26%	23%	23%
6 to less than 8 months	**16%**	14%	16%	20%	14%
8 to less than 12 months	**11%**	14%	11%	9%	10%
12 months or more	**20%**	23%	25%	17%	14%
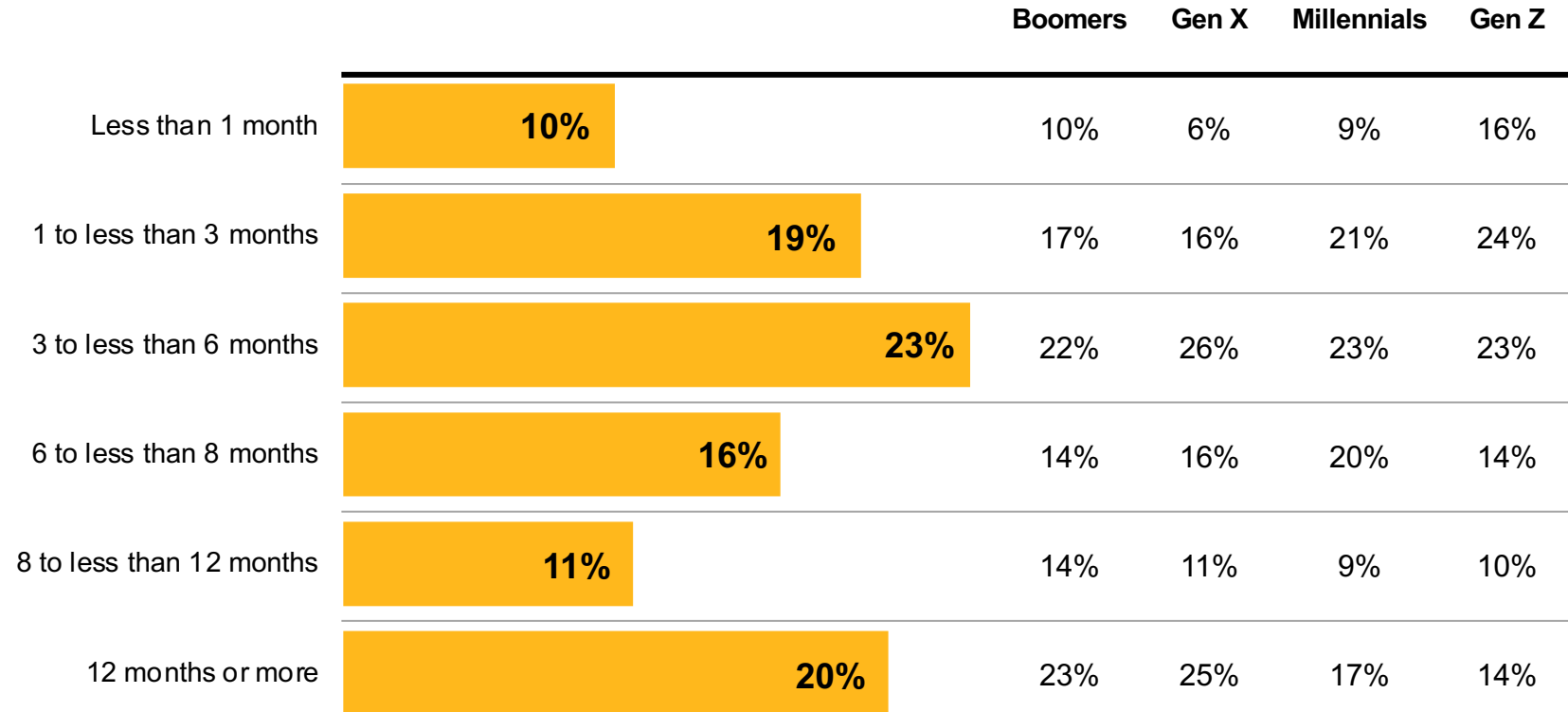
Question: On average, what do you anticipate will be the length of the buying cycle for each purchase?

ITDMs listen to podcasts for news on emerging tech

61%
of ITDMs have listened to a business-related podcast in the past year

Boomers	**60%**
Gen X	**58%**
Millennials	**60%**
Gen Z	**73%**

Legend: ■ Boomers ■ Gen X ■ Millennials ■ Gen Z

To find out about emerging/new technology
- Boomers: 46%
- Gen X: 50%
- Millennials: 39%
- Gen Z: 46%

Business trends
- Boomers: 31%
- Gen X: 40%
- Millennials: 42%
- Gen Z: 39%

Breaking/recent technology or industry news
- Boomers: 31%
- Gen X: 38%
- Millennials: 38%
- Gen Z: 28%

Thought leadership (e.g., "Executive series")
- Boomers: 35%
- Gen X: 32%
- Millennials: 22%
- Gen Z: 21%

Stories about real-life experiences
- Boomers: 24%
- Gen X: 18%
- Millennials: 29%
- Gen Z: 26%

Panel discussions around a topic
- Boomers: 19%
- Gen X: 15%
- Millennials: 18%
- Gen Z: 21%
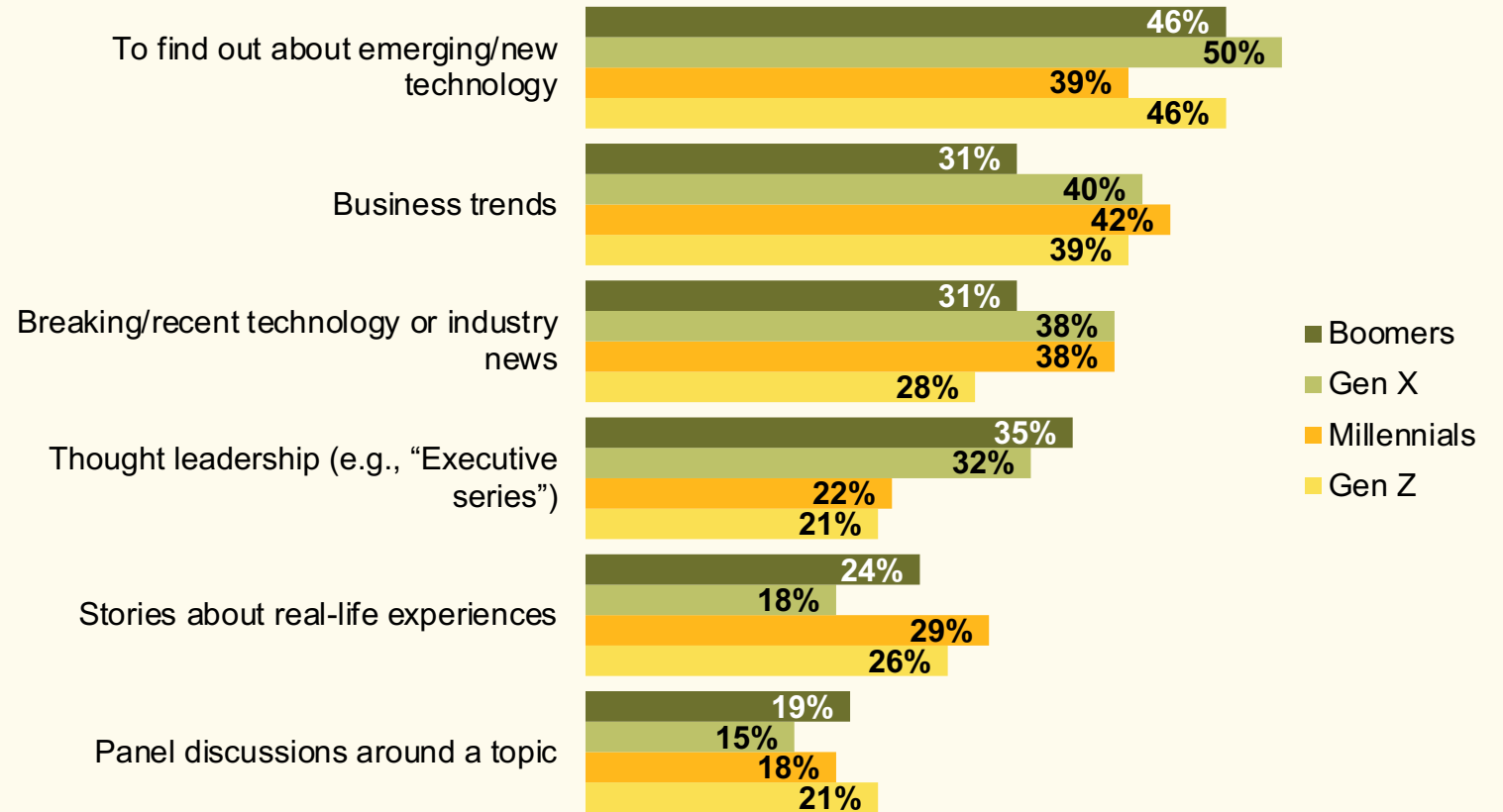
Q: Have you listened to a business-related podcast in the past 12 months? Q: What were your top 2 reasons for listening to a business-related podcast?

Video content is a powerful way to reach ITDMs

95%
of ITDMs watch technology-related videos

Boomers	92%
Gen X	96%
Millennials	99%
Gen Z	98%

Industry research/tech analyst reports
- Gen Z: 40%
- Millennials: 40%
- Gen X: 51%
- Boomers: 42%

In-depth product reviews
- Gen Z: 43%
- Millennials: 39%
- Gen X: 48%
- Boomers: 45%

Interviews with industry experts
- Gen Z: 33%
- Millennials: 35%
- Gen X: 42%
- Boomers: 40%

Technology news reports/ Live coverage of news events (e.g., product announcements, event coverage)
- Gen Z: 34%
- Millennials: 37%
- Gen X: 40%
- Boomers: 36%

How-to videos
- Gen Z: 31%
- Millennials: 26%
- Gen X: 37%
- Boomers: 41%

Webcasts/Web shows (live or prerecorded video series)
- Gen Z: 33%
- Millennials: 31%
- Gen X: 34%
- Boomers: 40%

Interactive video (e.g., chalkboard, diagrams, infographics, technology primers)
- Gen Z: 26%
- Millennials: 32%
- Gen X: 25%
- Boomers: 24%

First-look product overviews (e.g., unboxing videos)
- Gen Z: 30%
- Millennials: 23%
- Gen X: 23%
- Boomers: 22%

Legend:
- Gen Z
- Millennials
- Gen X
- Boomers

Q: Have you listened to a business-related podcast in the past 12 months? Q: What were your top 2 reasons for listening to a business-related podcast?

FOUNDRY

ITDMs listen to podcasts for news on emerging tech

61%

of ITDMs have listened to a business-related podcast in the past year

To find out about emerging/new technology
46%

Business trends
37%

Breaking/recent technology or industry news
32%

Thought leadership (e.g., "Executive series")
27%

Stories about real-life experiences
24%

Panel discussions around a topic
19%

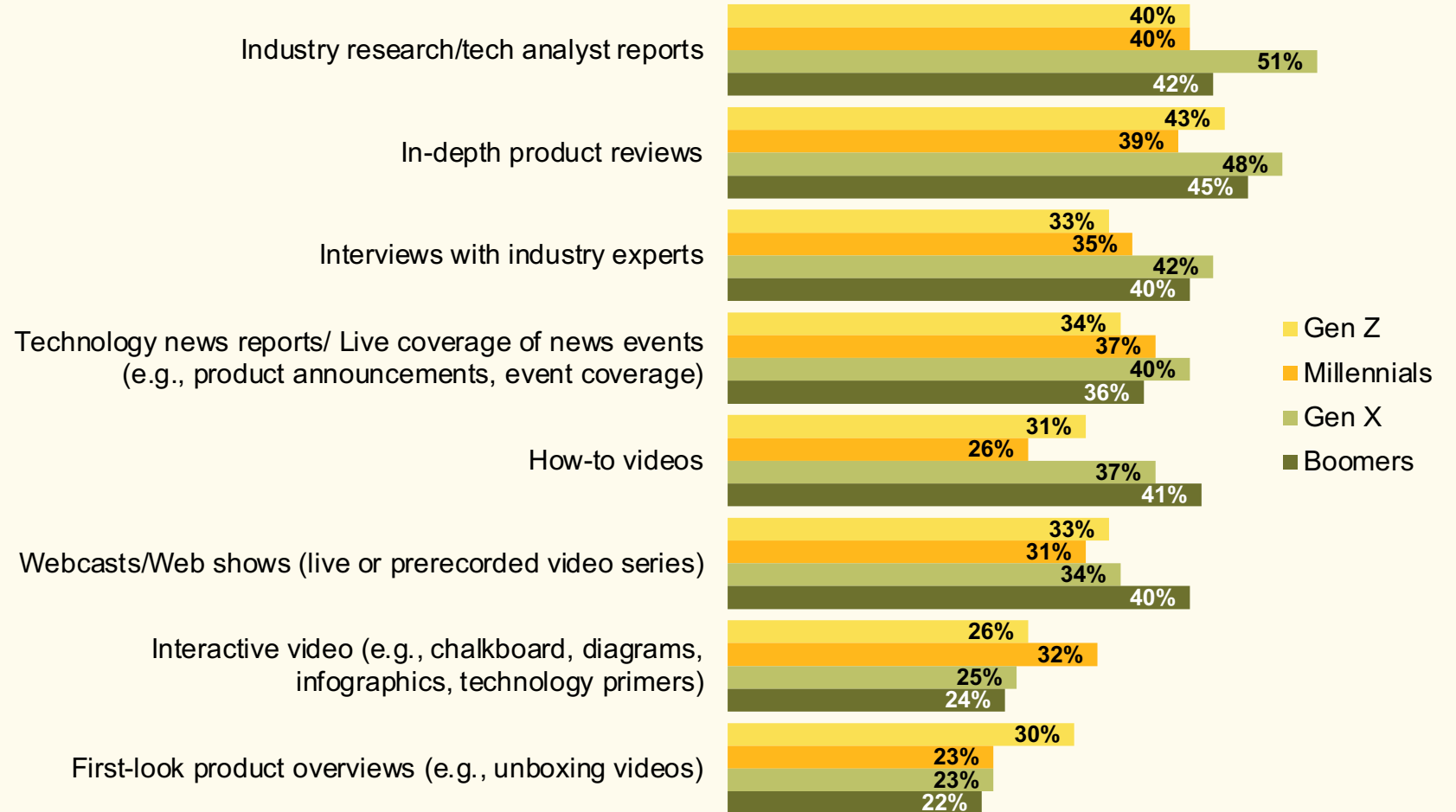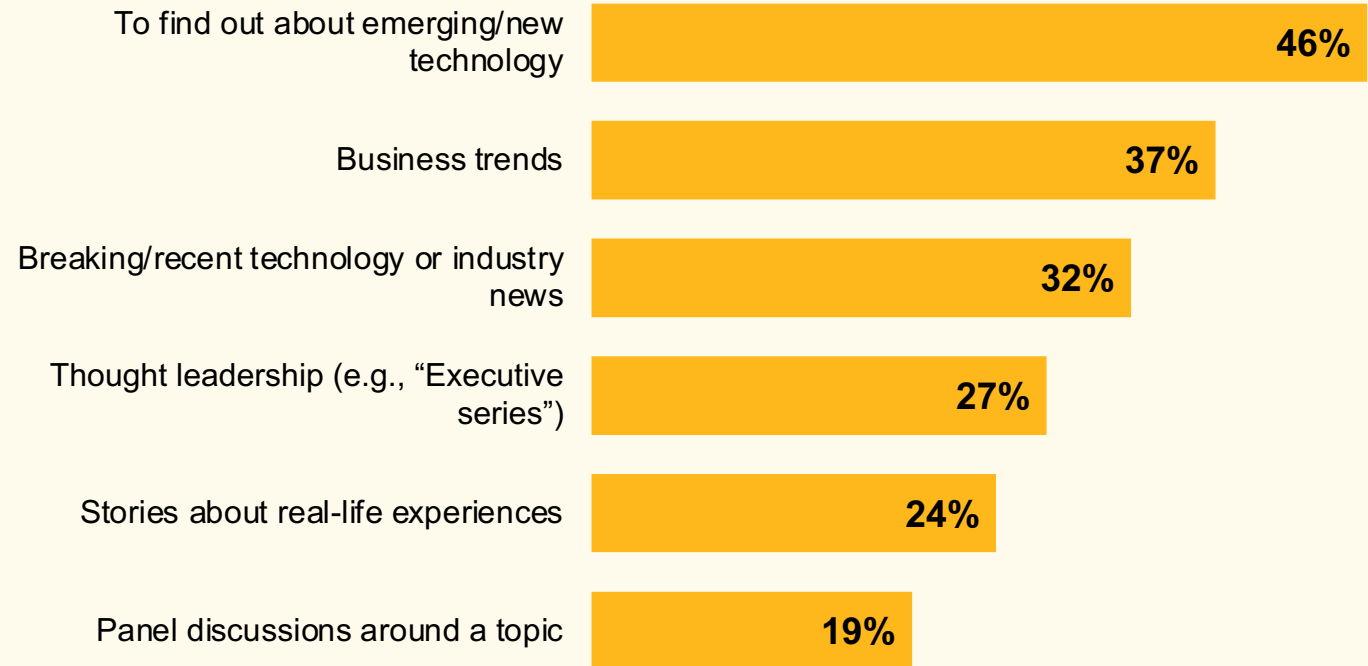**Q:** Have you listened to a business-related podcast in the past 12 months? Q: What were your top 2 reasons for listening to a business-related podcast?

Source: Foundry Role & Influence of the Technology Decision-Maker Survey, 2024

Complexity transcends geographic boundaries

	Average number of sources of information used by stage			Stage(s) of the process most likely to stall			Stage(s) of the process you need additional resources or assistance from a vendor		
	NA	**EMEA**	**APAC**	**NA**	**EMEA**	**APAC**	**NA**	**EMEA**	**APAC**
Determine the business need	6.3	5.2	5.3	34%	36%	42%	23%	26%	33%
Determine technical requirements	6	5.4	5.3	28%	32%	40%	42%	43%	47%
Evaluate products/services	7.1	5.8	5.5	33%	38%	43%	45%	45%	49%
Recommend or select vendors for purchase	5.7	5.3	5.4	22%	24%	28%	21%	28%	29%
Sell internally (e.g., outside of the IT team)	4.4	4.3	5.1	34%	28%	23%	24%	18%	20%
Authorize or approve the purchase of products and services	3.6	3.2	4.5	31%	29%	28%	14%	16%	18%
Post sales engagement (e.g. adoption, maintenance, renewals, additions)	3.7	3.3	5.2	--	--	--	30%	25%	23%

Question: Of those you selected, which information sources are typically the most helpful in making a technology purchase decision? **Question:** During which stage(s) of the process are technology purchases most likely to stall at your organization? **Question:** During which stage(s) of the process are you most likely to need additional resources or assistance from a vendor?

Complexity transcends geographic boundaries

	Average number of sources of information used by stage				Stage(s) of the process most likely to stall				Stage(s) of the process you need additional resources or assistance from a vendor			
	Boomer	**Gen X**	**Millennial**	**Gen Z**	**Boomer**	**Gen X**	**Millennial**	**Gen Z**	**Boomer**	**Gen X**	**Millennial**	**Gen Z**
Determine the business need	6.9	5.9	5.1	5.3	28%	34%	47%	42%	16%	23%	39%	33%
Determine technical requirements	6.4	6.1	4.5	6.2	23%	30%	39%	43%	40%	45%	44%	48%
Evaluate products/services	7.3	7.3	4.8	5.7	26%	34%	43%	46%	47%	49%	44%	44%
Recommend or select vendors for purchase	5.6	5.8	5.6	5.1	23%	22%	28%	27%	19%	21%	33%	31%
Sell internally (e.g., outside of the IT team)	4.9	4.3	4.2	5.3	30%	31%	25%	35%	20%	23%	24%	21%
Authorize or approve the purchase of products and services	3.5	3.2	4.7	4.5	29%	33%	29%	25%	12%	10%	16%	26%
Post sales engagement (e.g. adoption, maintenance, renewals, additions)	4.5	3.7	4.2	4.8	--	--	--	--	34%	32%	21%	20%

Question: Of those you selected, which information sources are typically the most helpful in making a technology purchase decision? **Question:** During which stage(s) of the process are technology purchases most likely to stall at your organization? **Question:** During which stage(s) of the process are you most likely to need additional resources or assistance from a vendor?

Existing vendors don't always have an edge

Purchase from
an existing vendor — **58%**

Seek a new vendor — **42%**

42%
will purchase from a new vendor because the vendor/product is more innovative or feature rich

Q: For each purchase, please indicate whether you sought or will seek a new vendor or purchase from an existing vendor. **Question:** What would prompt you to seek a new vendor for any technology purchase?

Innovation is winning customers

Reason	Percentage
New vendor/product is more innovative or feature rich	39%
Current product/service no longer met our business needs	34%
Increased cost/level of investment required by current vendor	29%
New initiative or request from Line of Business executives	28%
Poor customer service	27%
Current product/service did not meet our security requirements	26%
Current product/service did not align with our digital transformation efforts	24%
Shift in economic conditions	22%
We have never purchased this type of product or service before	21%
Recommendation from a peer outside your company	19%
Metrics in service level agreement were not being met	18%
Our IT team does not have the skills necessary to work with current product/service	17%
Current vendor no longer seems financially stable	17%

Callout from "Current product/service no longer met our business needs" (34%):

Boomers	39%
Gen X	42%
Millennials	32%
Gen Z	24%

Callout from "Poor customer service" (27%):

Boomers	39%
Gen X	30%
Millennials	20%
Gen Z	25%

Question: What would prompt you to seek a new vendor for any technology purchase?

Innovation continues to attract customers

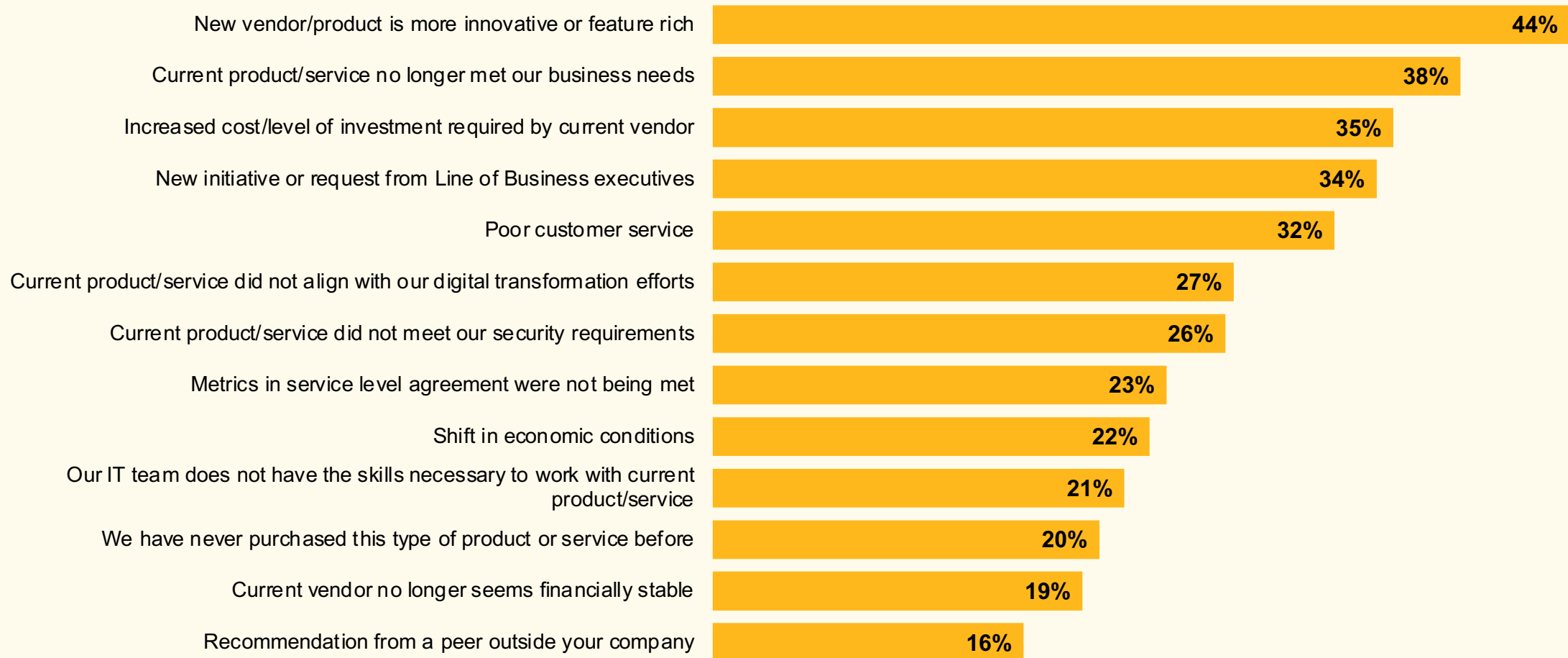| Category	Percentage
New vendor/product is more innovative or feature rich	44%
Current product/service no longer met our business needs	38%
Increased cost/level of investment required by current vendor	35%
New initiative or request from Line of Business executives	34%
Poor customer service	32%
Current product/service did not align with our digital transformation efforts	27%
Current product/service did not meet our security requirements	26%
Metrics in service level agreement were not being met	23%
Shift in economic conditions	22%
Our IT team does not have the skills necessary to work with current product/service	21%
We have never purchased this type of product or service before	20%
Current vendor no longer seems financially stable	19%
Recommendation from a peer outside your company	16%

Q: What would prompt you to seek a new vendor for any technology purchase? (1,000+ company size respondents)

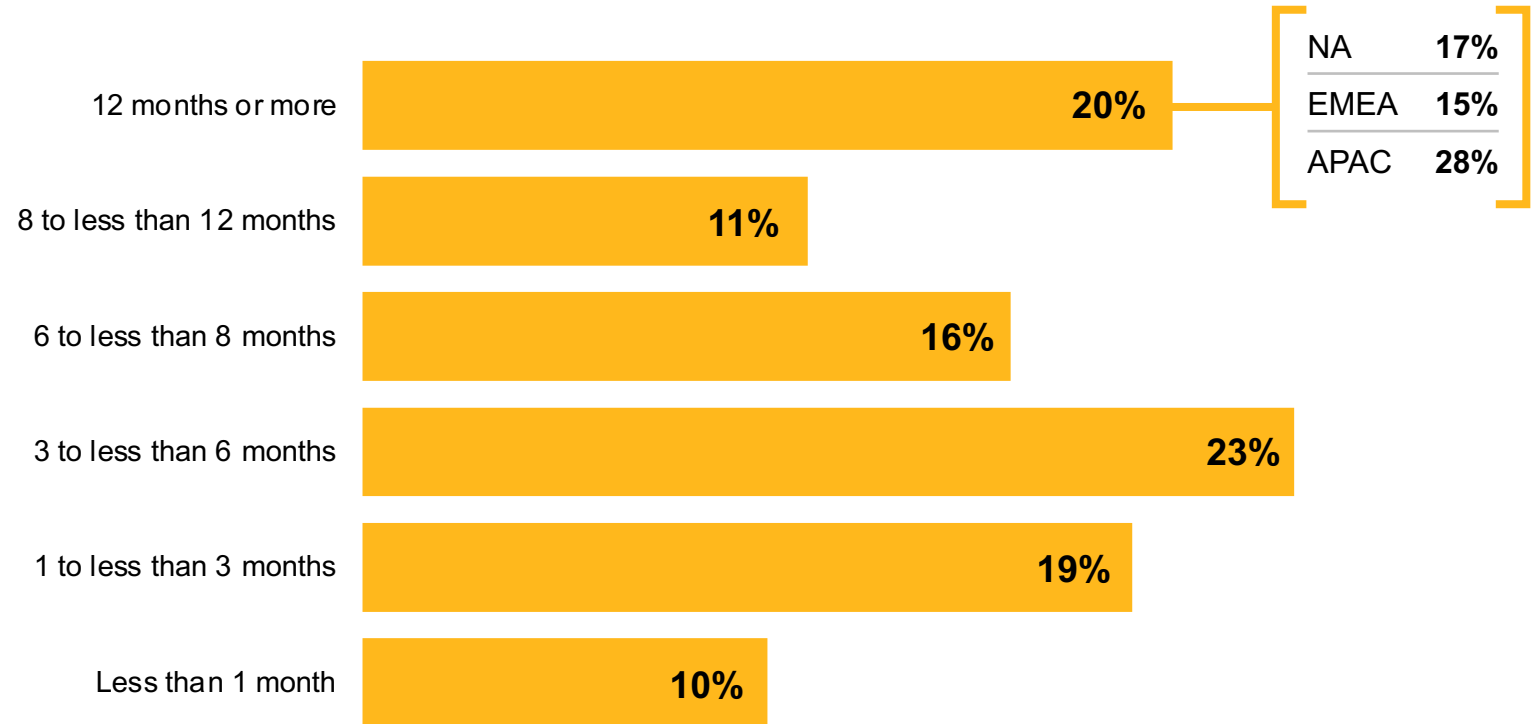# Use of product and customer service bigger drivers for SMBs

Current product/service no longer met our business needs	**40%**
New vendor/product is more innovative or feature rich	**40%**
Poor customer service	**37%**
Current product/service did not meet our security requirements	**29%**
Increased cost/level of investment required by current vendor	**29%**
Current product/service did not align with our digital transformation efforts	**26%**
New initiative or request from Line of Business executives	**23%**
Shift in economic conditions	**21%**
Recommendation from a peer outside your company	**21%**
We have never purchased this type of product or service before	**21%**
Current vendor no longer seems financially stable	**17%**
Metrics in service level agreement were not being met	**16%**
Our IT team does not have the skills necessary to work with current product/service	**15%**

Q: What would prompt you to seek a new vendor for any technology purchase? (<1,000 company size respondents)

FOUNDRY

Average length of the buying cycle

6.1 months
is the average length of the tech purchase process

NA	5.9 months
EMEA	5.2 months
APAC	7 months

12 months or more	20%

NA	17%
EMEA	15%
APAC	28%

- 8 to less than 12 months — 11%
- 6 to less than 8 months — 16%
- 3 to less than 6 months — 23%
- 1 to less than 3 months — 19%
- Less than 1 month — 10%

Q: On average, what do you anticipate will be the length of the buying cycle for each purchase?

Developing the business case with help from vendors

94%

1,000+	96%
<1,000	93%

of ITDMs need additional resources or assistance from vendors throughout the technology purchase process

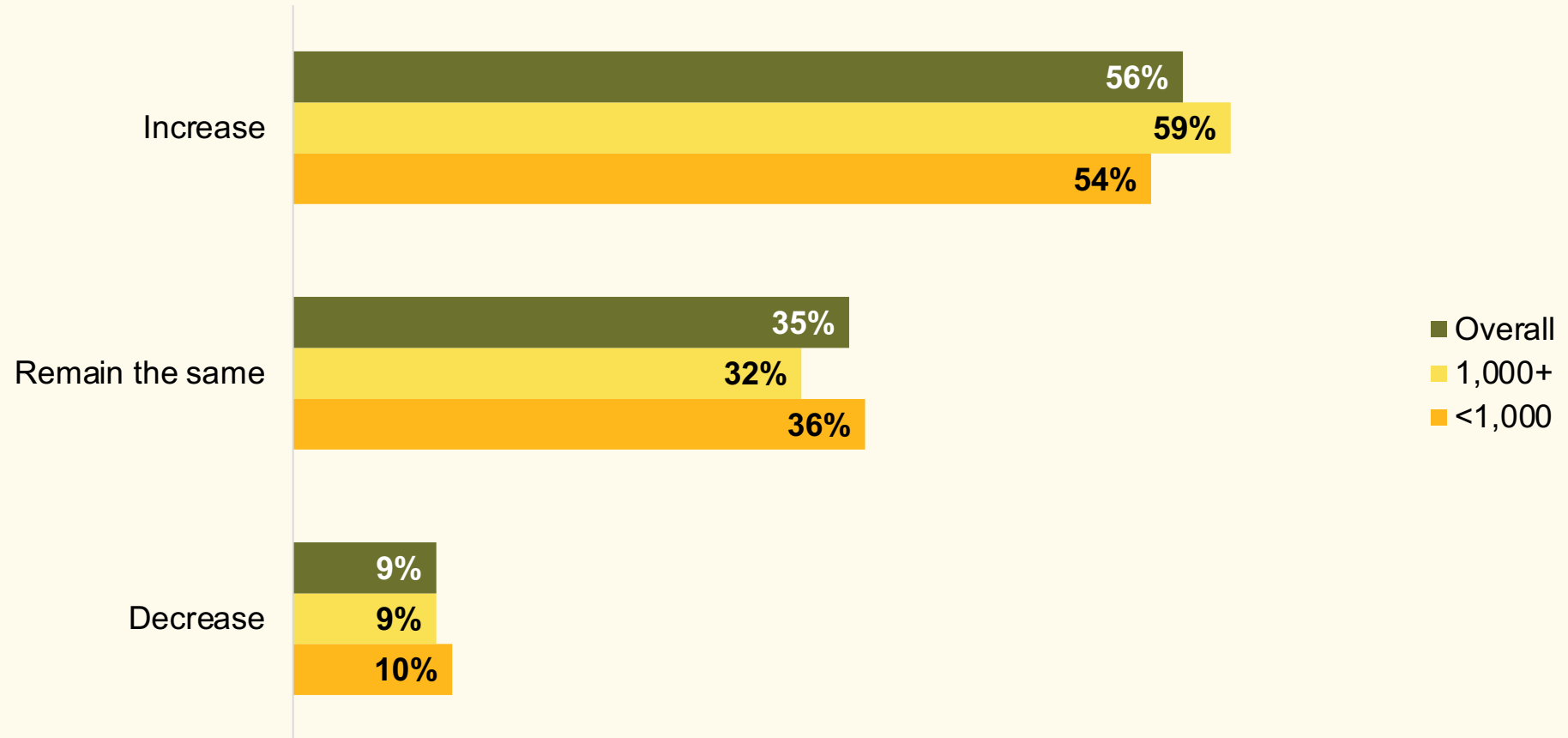| Executive IT	94%	Boomers	92%
Mid-level IT	99%	GenX	95%
IT professional	96%	Millenials	97%
Business mgmt.	90%	GenZ	96%

65%

1,000+	69%
<1,000	62%

work with vendors to help them develop the business case around their investment in the technology

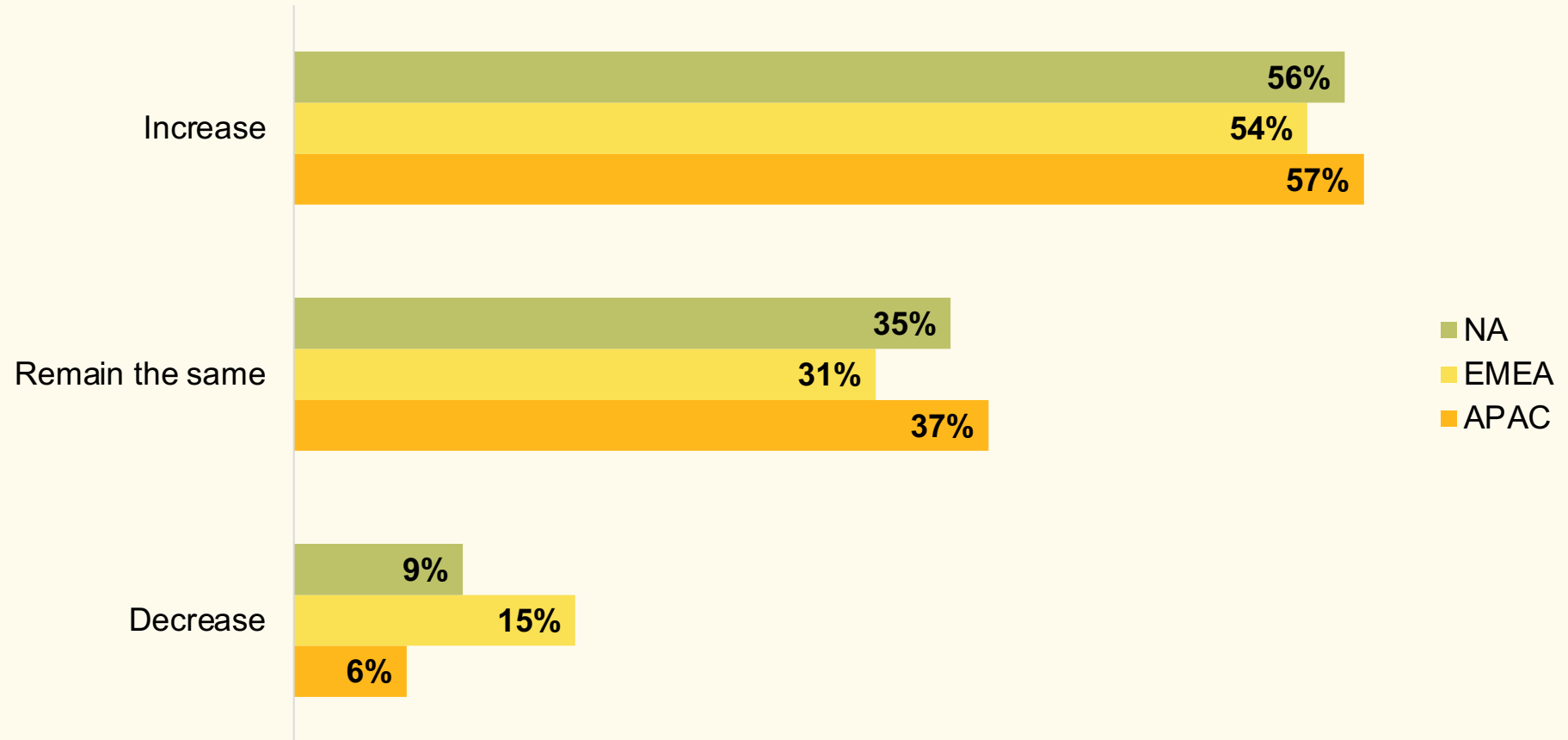| Executive IT	72%	Boomers	64%
Mid-level IT	86%	GenX	65%
IT professional	73%	Millenials	73%
Business mgmt.	80%	GenZ	68%

Question: Please rate your level of agreement with the following statements: AND **Question:** During which stage(s) of the process are you most likely to need additional resources or assistance from a vendor?

Revenue shifts by company size

Increase
- Overall: 56%
- 1,000+: 59%
- <1,000: 54%

Remain the same
- Overall: 35%
- 1,000+: 32%
- <1,000: 36%

Decrease
- Overall: 9%
- 1,000+: 9%
- <1,000: 10%

Legend:
- Overall
- 1,000+
- <1,000

Q: How do you expect your company's revenue to change over the next 12 months compared to the past 12 months?

FOUNDRY

Source: Foundry Role & Influence of the Technology Decision-Maker, 2024

Revenue shifts by region

Increase
- NA: 56%
- EMEA: 54%
- APAC: 57%

Remain the same
- NA: 35%
- EMEA: 31%
- APAC: 37%

Decrease
- NA: 9%
- EMEA: 15%
- APAC: 6%

Legend:
- NA
- EMEA
- APAC

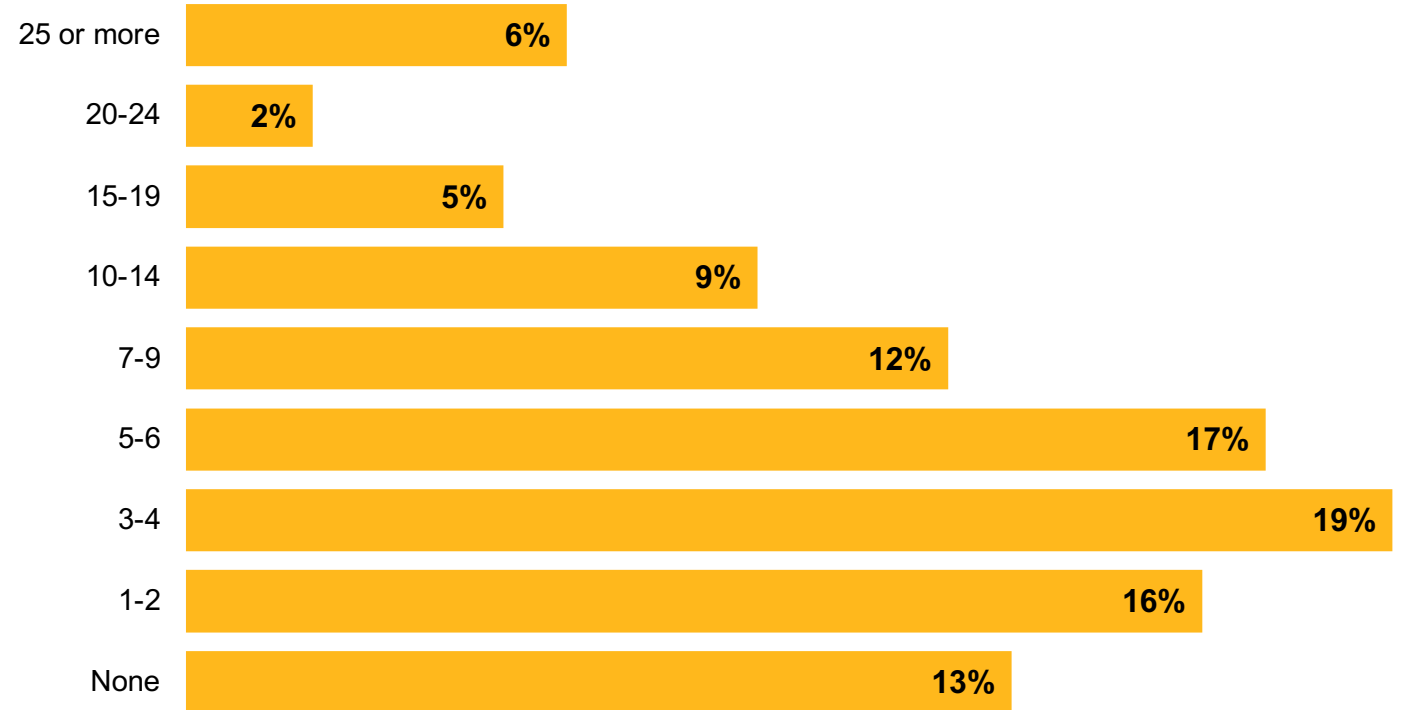Q: How do you expect your company's revenue to change over the next 12 months compared to the past 12 months?

Average amount of content downloaded

7

average number of
pieces of content
downloaded during the
purchase process

NA	6.8	1,000+	7.3
EMEA	6.2	<1,000	6.2
APAC	7.3		

Category	Percentage
25 or more	6%
20-24	2%
15-19	5%
10-14	9%
7-9	12%
5-6	17%
3-4	19%
1-2	16%
None	13%

Question: Approximately, how many pieces of information (i.e., white papers, research reports, project briefs) did you download to aid you in the purchase process?

SMB ITDMs use social to be effective in their role

Channel	Percentage
YouTube	75%
Instagram	57%
LinkedIn	50%
Facebook	50%
X, formerly Twitter	43%
TikTok	39%
Reddit	28%
Threads	22%
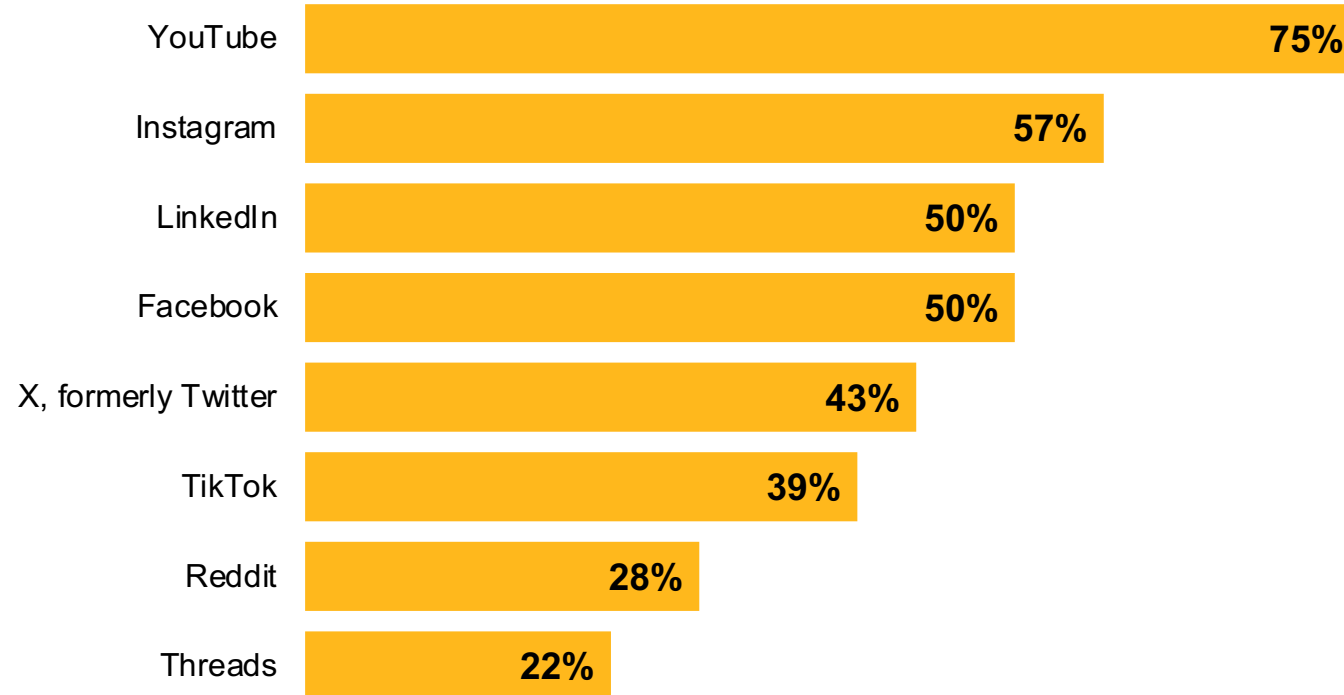
Q: Which social media channels do you rely on to be effective in your role? (<1,000 company size)

Enterprise ITDMs use social to be effective in their role

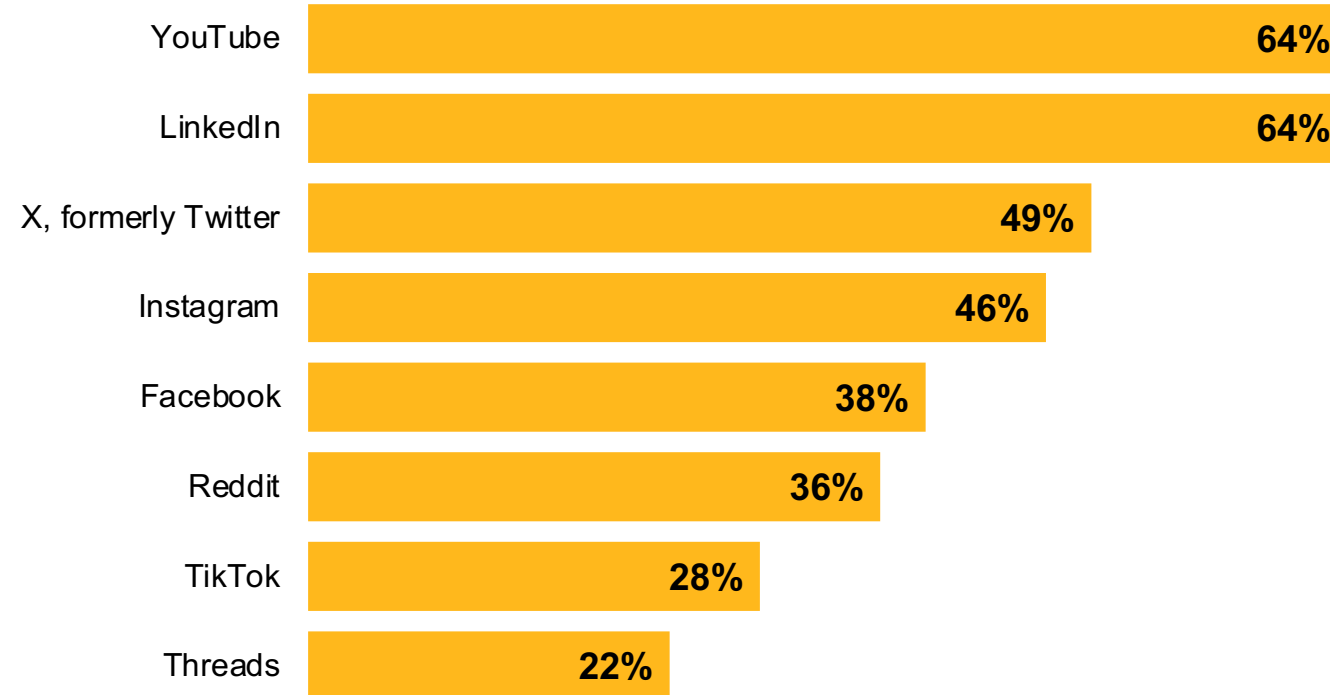| Platform	Percentage
YouTube	71%
LinkedIn	61%
Instagram	51%
Facebook	47%
X, formerly Twitter	43%
TikTok	33%
Reddit	27%
Threads	20%
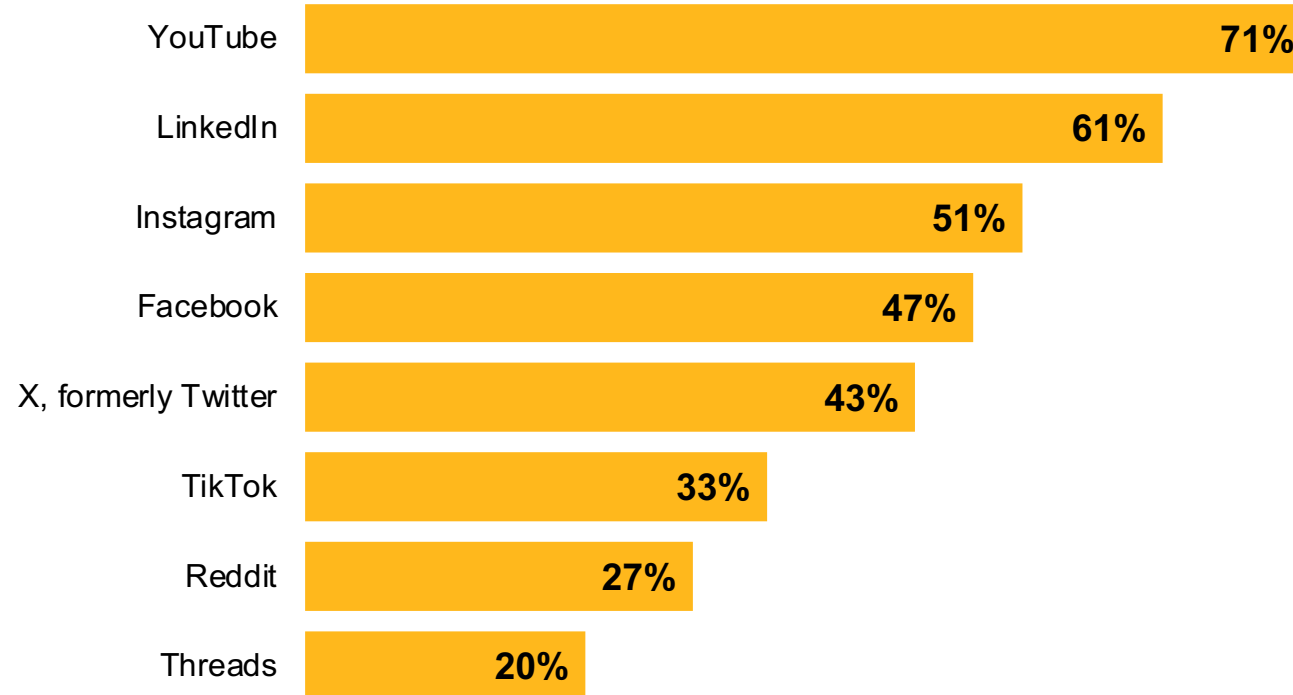
Q: Which social media channels do you rely on to be effective in your role? (1,000+ company size)

North America ITDMs use social to be effective in their role

Platform	Percentage
YouTube	64%
LinkedIn	64%
X, formerly Twitter	49%
Instagram	46%
Facebook	38%
Reddit	36%
TikTok	28%
Threads	22%

Q: Which social media channels do you rely on to be effective in your role? (North America respondents)

FOUNDRY

EMEA ITDMs use social to be effective in their role

Platform	Percentage
YouTube	76%
Instagram	52%
LinkedIn	50%
TikTok	43%
Facebook	26%
X, formerly Twitter	24%
Reddit	17%
Threads	12%

Q: Which social media channels do you rely on to be effective in your role? (EMEA respondents)
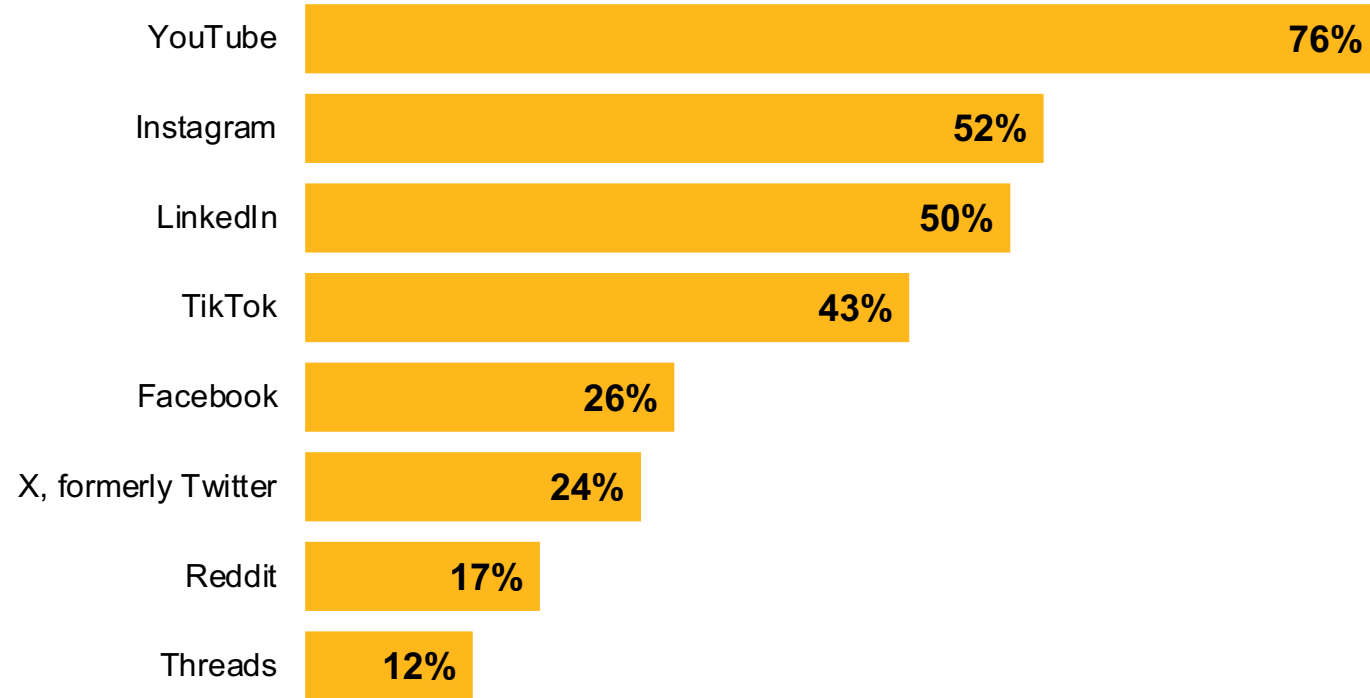
APAC ITDMs use social to be effective in their role

Platform	Percentage
YouTube	77%
Facebook	57%
LinkedIn	53%
Instagram	53%
X, formerly Twitter	44%
TikTok	36%
Reddit	23%
Threads	23%
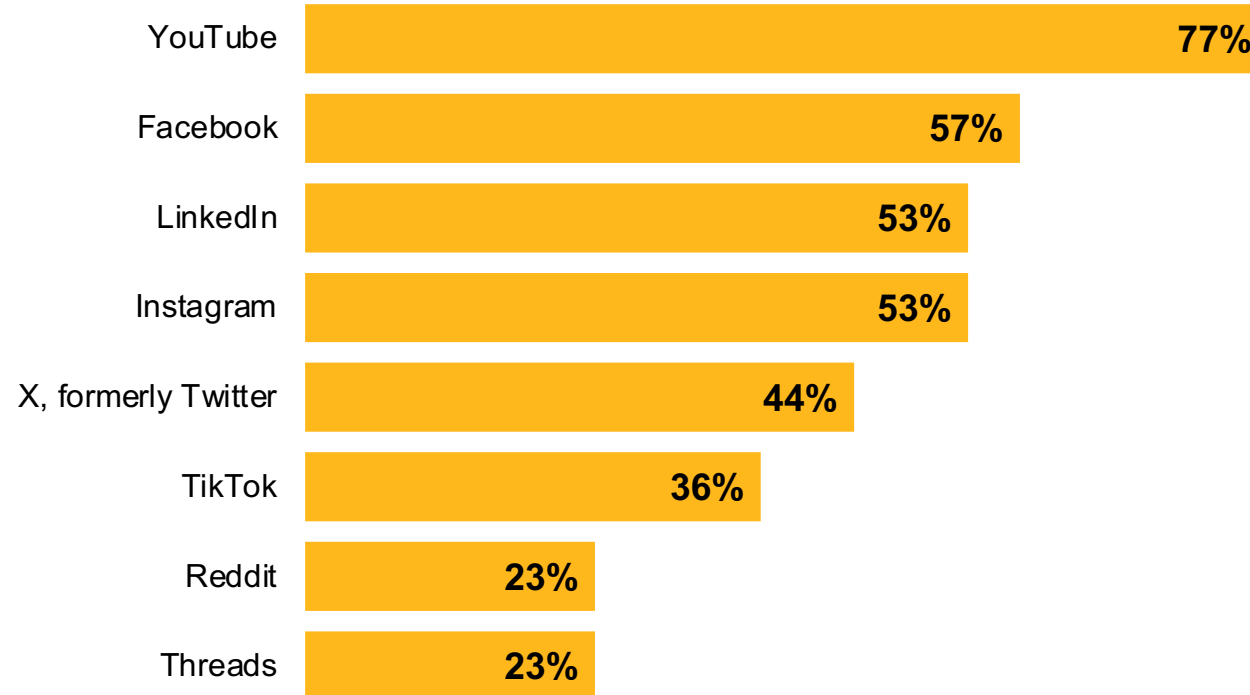
Q: Which social media channels do you rely on to be effective in your role? (APAC respondents)

FOUNDRY

Source: Foundry Role & Influence of the Technology Decision-Maker Survey, 2024

Vendor assistance is needed within the evaluation stage

	Average number of sources of information used by stage		Stage(s) of the process most likely to stall		Stage(s) of the process you need additional resources or assistance from a vendor	
	<1,000	1,000+	<1,000	1,000+	<1,000	1,000+
Determine the business need	5.6	5.8	34%	39%	26%	29%
Determine technical requirements	5.2	6	27%	38%	43%	45%
Evaluate products/services	5.9	6.9	35%	39%	46%	47%
Recommend or select vendors for purchase	5.1	6	20%	29%	20%	30%
Sell internally (e.g., outside of the IT team)	4.3	4.8	24%	34%	19%	23%
Authorize or approve the purchase of products and services	3.4	4.1	27%	30%	15%	17%
Post sales engagement (e.g., adoption, maintenance, renewals, additions)	3.6	4.4	--	--	25%	28%

Question: Considering major enterprise IT purchases, which of the following information sources are used at each stage of the purchase process in which you are involved? **Question:** During which stage(s) of the process are technology purchases most likely to stall at your organization? **Question:** During which stage(s) of the process are you most likely to need additional resources or assistance from a vendor?

Complexity transcends geographic boundaries

	Average number of sources of information used by stage			Stage(s) of the process most likely to stall			Stage(s) of the process you need additional resources or assistance from a vendor		
	NA	**EMEA**	**APAC**	**NA**	**EMEA**	**APAC**	**NA**	**EMEA**	**APAC**
Determine the business need	6.3	5.2	5.3	34%	36%	42%	23%	26%	33%
Determine technical requirements	6	5.4	5.3	28%	32%	40%	42%	43%	47%
Evaluate products/services	7.1	5.8	5.5	33%	38%	43%	45%	45%	49%
Recommend or select vendors for purchase	5.7	5.3	5.4	22%	24%	28%	21%	28%	29%
Sell internally (e.g., outside of the IT team)	4.4	4.3	5.1	34%	28%	23%	24%	18%	20%
Authorize or approve the purchase of products and services	3.6	3.2	4.5	31%	29%	28%	14%	16%	18%
Post sales engagement (e.g. adoption, maintenance, renewals, additions)	3.7	3.3	5.2	--	--	--	30%	25%	23%

Question: Of those you selected, which information sources are typically the most helpful in making a technology purchase decision? **Question:** During which stage(s) of the process are technology purchases most likely to stall at your organization? **Question:** During which stage(s) of the process are you most likely to need additional resources or assistance from a vendor?

Advancing through the purchase process with help from vendors

94%

of ITDMs need additional resources or assistance from vendors throughout the technology purchase process

65%
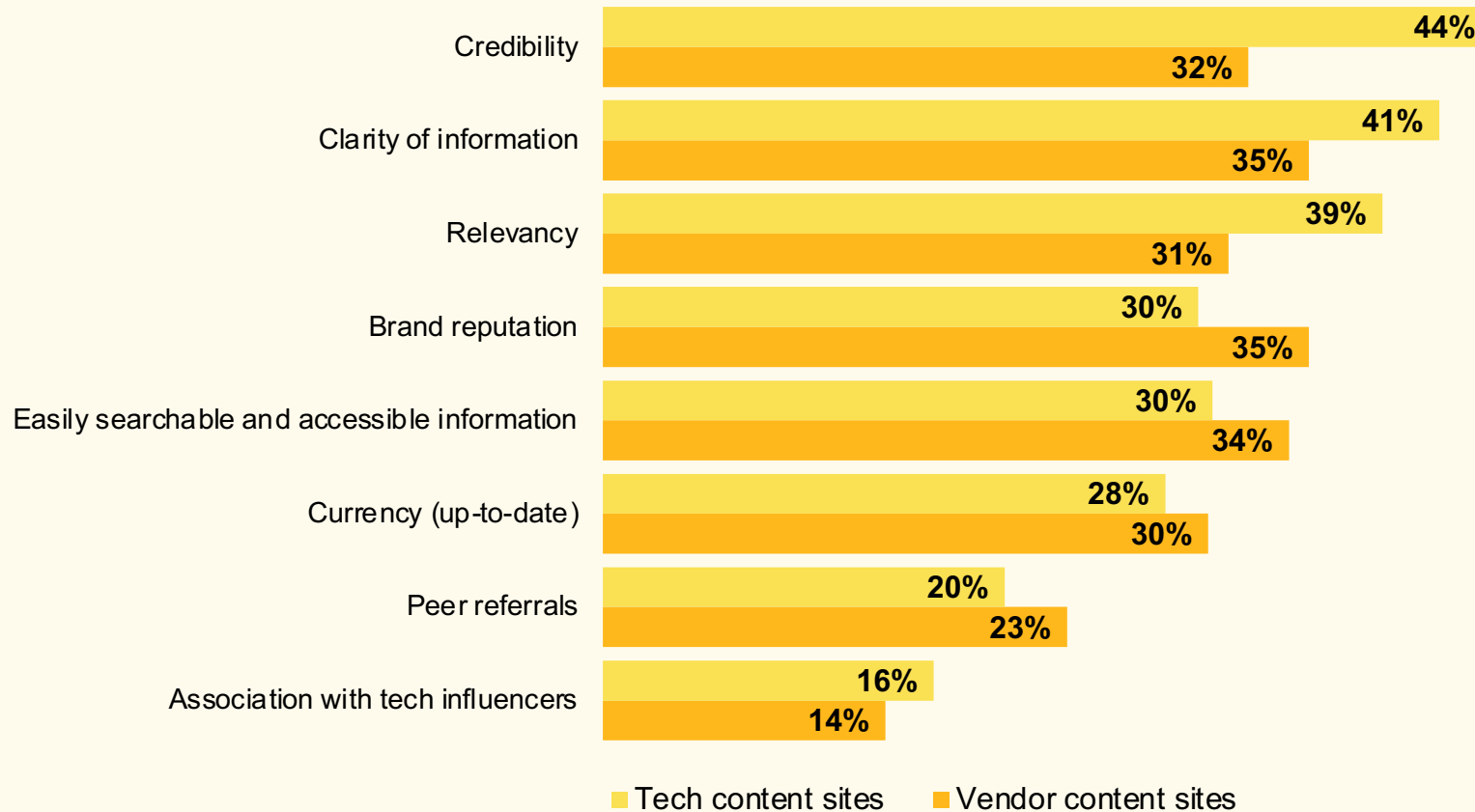
work with vendors to help them develop the business case around their investment in the technology

Question: Please rate your level of agreement with the following statements: AND **Question:** During which stage(s) of the process are you most likely to need additional resources or assistance from a vendor?

Source: Foundry Role & Influence of the Technology Decision-Maker Survey, 2024

Brand reputation impacts vendor content, while credibility tops for tech content sites

Credibility
- Tech content sites: **44%**
- Vendor content sites: **32%**

Clarity of information
- Tech content sites: **41%**
- Vendor content sites: **35%**

Relevancy
- Tech content sites: **39%**
- Vendor content sites: **31%**

Brand reputation
- Tech content sites: **30%**
- Vendor content sites: **35%**

Easily searchable and accessible information
- Tech content sites: **30%**
- Vendor content sites: **34%**

Currency (up-to-date)
- Tech content sites: **28%**
- Vendor content sites: **30%**

Peer referrals
- Tech content sites: **20%**
- Vendor content sites: **23%**

Association with tech influencers
- Tech content sites: **16%**
- Vendor content sites: **14%**

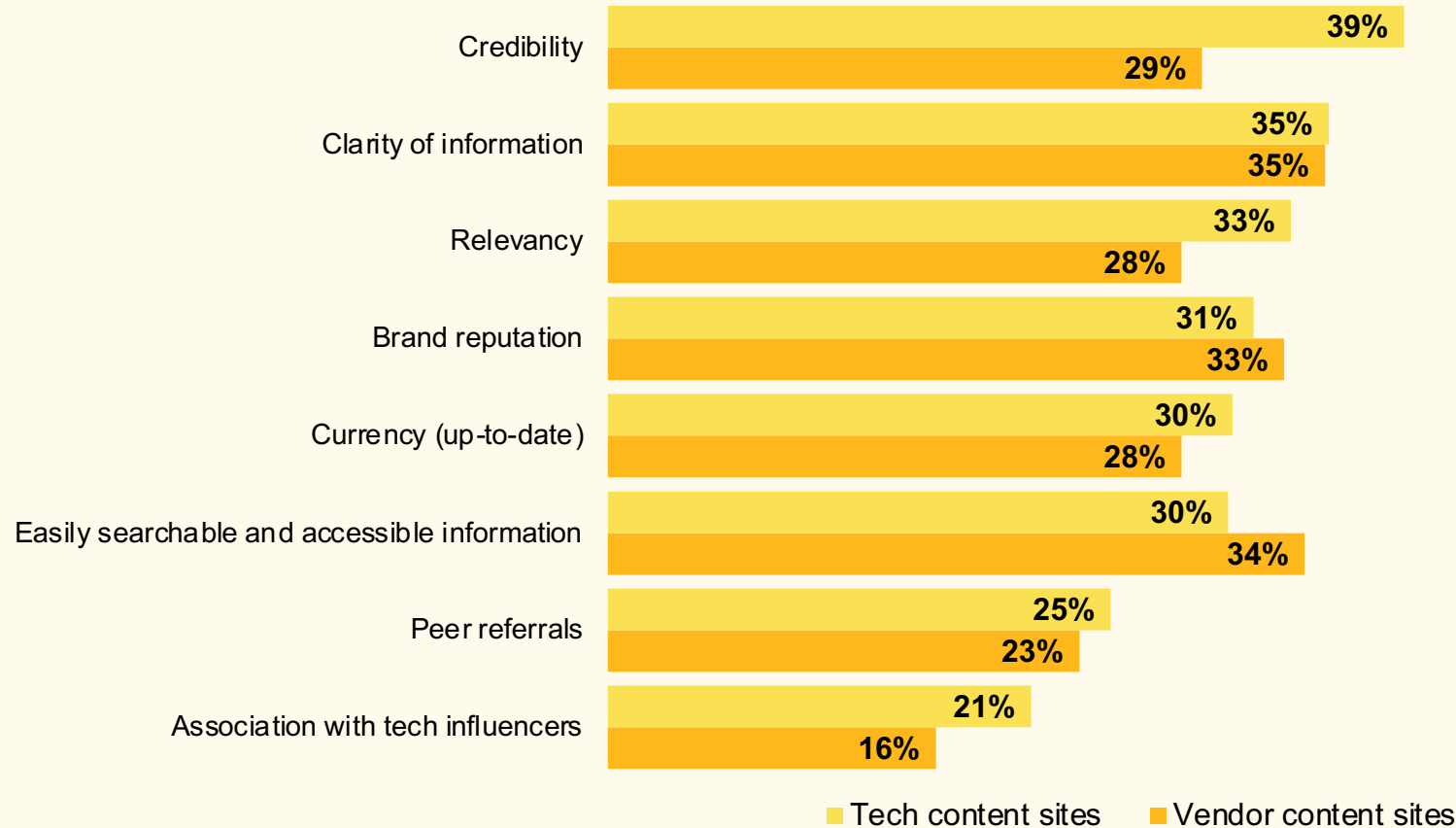■ Tech content sites   ■ Vendor content sites

46%
of SMB ITMDs say that vendor reputation is highly important during the tech purchase process

Q: When searching for tech-related information, how do you measure the value of the following content sites? Q: How important is vendor reputation in the technology purchase process? **(<1,000 company size respondents)**

Clarity impacts vendor content, while credibility tops for tech content sites among enterprise buyers

Credibility
- Tech content sites: 39%
- Vendor content sites: 29%

Clarity of information
- Tech content sites: 35%
- Vendor content sites: 35%

Relevancy
- Tech content sites: 33%
- Vendor content sites: 28%

Brand reputation
- Tech content sites: 31%
- Vendor content sites: 33%

Currency (up-to-date)
- Tech content sites: 30%
- Vendor content sites: 28%

Easily searchable and accessible information
- Tech content sites: 30%
- Vendor content sites: 34%

Peer referrals
- Tech content sites: 25%
- Vendor content sites: 23%

Association with tech influencers
- Tech content sites: 21%
- Vendor content sites: 16%

■ Tech content sites ■ Vendor content sites

48%
of enterprise ITMDs say that vendor reputation is highly important during the tech purchase process

Q: When searching for tech-related information, how do you measure the value of the following content sites Q: How important is vendor reputation in the technology purchase process? **(1,000+ company size respondents**)

How ITDMs measure the value of tech content sites

		North America	EMEA	APAC
Credibility	41%	44%	42%	39%
Clarity of information	38%	41%	36%	34%
Relevancy	36%	40%	38%	30%
Brand reputation	30%	35%	26%	28%
Easily searchable and accessible information	30%	31%	28%	29%
Currency (up-to-date)	29%	29%	30%	29%
Peer referrals	22%	24%	23%	21%
Association with tech influencers	19%	16%	23%	22%

Q: When searching for tech-related information, how do you measure the value of the following content sites Q: How important is vendor reputation in the technology purchase process?

FOUNDRY

How ITDMs measure the value of vendor content sites

	%	North America	EMEA	APAC
Clarity of information	35%	39%	37%	31%
Easily searchable and accessible information	34%	38%	34%	29%
Brand reputation	34%	37%	36%	30%
Credibility	30%	28%	39%	30%
Relevancy	29%	35%	26%	23%
Currency (up-to-date)	29%	31%	23%	29%
Peer referrals	23%	23%	26%	21%
Association with tech influencers	15%	13%	17%	17%

Q: When searching for tech-related information, how do you measure the value of the following content sites Q: How important is vendor reputation in the technology purchase process?

Top information sources relied upon at each stage

Determine the business need	Determine technical requirements	Evaluate products and services	Recommend or select vendors	Sell internally	Approve and authorize purchase	Post-sales engagement
Technology content sites	Technology content sites	Technology content sites	Peers outside your company (via phone, email, video conference)	Analyst firms (e.g., IDC, Gartner, Forrester)	Peers inside your company	Technology vendors (via phone, email, video conference)
White papers	White papers	Technology vendors (via phone, email, video conference)	Technology vendors (via phone, email, video conference)	Peers inside your company	Technology vendors (via phone, email, video conference)	Technology vendors (via vendor web site)
Peers inside your company	Technology vendors (via phone, email, video conference)	Technology vendors (via vendor web site)	Technology content sites	Technology content sites	Technology vendors (via vendor web site)	Technology vendors (in-person)
Executive conferences or events (in-person)	Technology vendors (via vendor web site)	White papers	Technology vendors (via vendor web site)	Technology vendors (via vendor web site)	Technology vendors (in-person)	Peers inside your company
Business content sites	Peers inside your company	Technology vendors (in-person)	Analyst firms	White papers	Technology content sites	Online communities, discussion forums
		Webcasts/webinars				
		Peers outside your company (via phone, email, video conference)				
		Online communities, discussion forums				

Question: Which of the following information sources do you use at each stage of the purchase process in which you are involved:

Top information sources relied upon at each stage

Determine the business need	Determine technical requirements	Evaluate products and services	Recommend or select vendors	Sell internally	Approve and authorize purchase	Post-sales engagement
Technology content sites	Technology vendors (in-person)	Technology vendors (via vendor web site)	Technology vendors (via vendor web site)	Peers inside your company	Peers inside your company	Technology vendors (via phone, email, video conference)
Peers inside your company	Technology vendors (via vendor web site)	Technology vendors (in-person)	Technology vendors (in-person)	Technology content sites	Technology vendors (in-person)	Technology vendors (in-person)
Analyst firms	Peers inside your company	Technology vendors (via phone, email, video conference)	Technology vendors (via phone, email, video conference)	Third-party market research	Technology vendors (via phone, email, video conference)	Technology vendors (via vendor web site)
Business content sites	Technology vendors (via phone, email, video conference)	Technology content sites	Peers inside your company	Technology vendors (via phone, email, video conference)	Technology content sites	Peers inside your company
Technology vendors (via vendor web site)	Technology content sites	Analyst firms	Peers outside your company (via phone, email, video conference)	Technology vendors (in-person)	Analyst firms	Peers outside your company (via phone, email, video conference)
						Technology vendors (via social/business networking sites)

Question: Which of the following information sources do you use at each stage of the purchase process in which you are involved:

Top information sources relied upon at each stage (<1,000 company size)

Determine the business need	Determine technical requirements	Evaluate products and services	Recommend or select vendors	Sell internally	Approve and authorize purchase	Post-sales engagement
Technology content sites	Technology content sites	Technology vendors (via vendor web site)	Technology vendors (via vendor web site)	Peers inside your company	Peers inside your company	Technology vendors (via phone, email, video conference)
Peers inside your company	Peers inside your company	Technology vendors (in-person)	Technology vendors (via phone, email, video conference)	Technology vendors (via phone, email, video conference)	Technology vendors (via phone, email, video conference)	Technology vendors (in-person)
Technology vendors (via vendor web site)	Technology vendors (in-person)	Technology vendors (via phone, email, video conference)	Technology vendors (in-person)	Technology vendors (in-person)	Technology vendors (via vendor web site)	Technology vendors (via vendor web site)
Business content sites	Technology vendors (via phone, email, video conference)	Technology content sites	Technology vendors (via social/business networking sites)	Technology content sites	Technology vendors (in-person)	Peers inside your company
Executive conferences or events (in-person)	Technology vendors (via vendor web site)	Third-party market research	Peers outside your company (in-person)	Third-party market research	Technology content sites	Peers outside your company (via phone, email, video conference)
						User groups (via newsletters, events, etc.)

Question: Which of the following information sources do you use at each stage of the purchase process in which you are involved: (<1,000 company size)

Source: Foundry Role & Influence of the Technology Decision-Maker Survey, 2024

Top information sources relied upon at each stage (1,000+ company size)

Determine the business need	Determine technical requirements	Evaluate products and services	Recommend or select vendors	Sell internally	Approve and authorize purchase	Post-sales engagement
Analyst firms	Technology vendors (in-person)	Technology vendors (in-person)	Technology vendors (in-person)	Peers inside your company	Peers inside your company	Technology vendors (via phone, email, video conference)
Technology content sites	Technology vendors (via vendor web site)	Analyst firms	Analyst firms	Technology content sites	Technology vendors (in-person)	Technology vendors (in-person)
Peers inside your company	Technology vendors (via phone, email, video conference)	Technology content sites	Peers inside your company	Third-party market research	Analyst firms	Peers inside your company
Business content sites	White papers	Technology vendors (via phone, email, video conference)	Peers outside your company (via phone, email, video conference)	Technology vendors (in-person)	Technology content sites	Technology vendors (via vendor web site)
Technology vendors (via social/business networking sites)	Peers inside your company	Technology vendors (via vendor web site)	Technology vendors (via phone, email, video conference)	White papers	Technology vendors (via phone, email, video conference)	Peers outside your company (via phone, email, video conference)
			Technology content sites	Technology vendors (via phone, email, video conference)	Technology vendors (via social/business networking sites)	Technology vendors (via social/business networking sites)
			Technology vendors (via vendor web site)			

Question: Which of the following information sources do you use at each stage of the purchase process in which you are involved: (1,000+ company size)
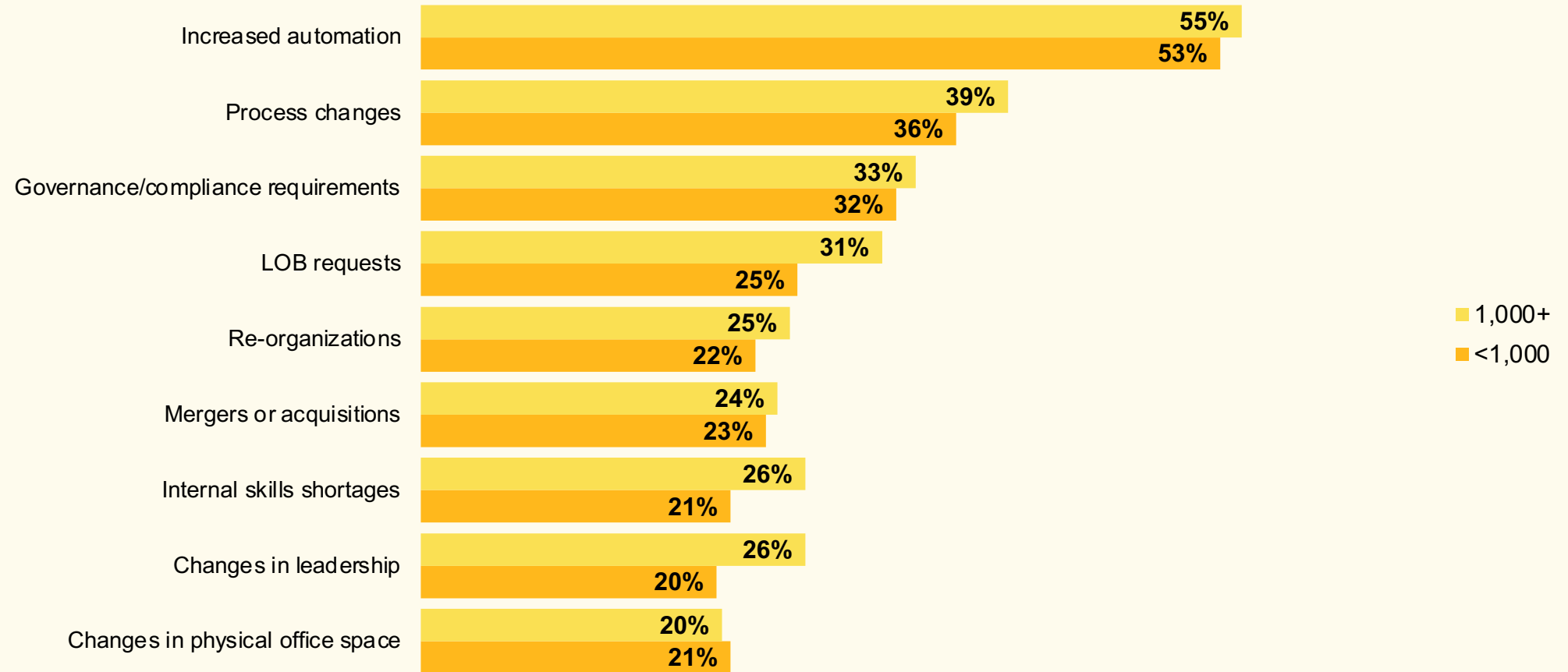
Source: Foundry Role & Influence of the Technology Decision-Maker Survey, 2024

Internal events accelerating technology purchase decisions

Increased automation
- 1,000+: 55%
- <1,000: 53%

Process changes
- 1,000+: 39%
- <1,000: 36%

Governance/compliance requirements
- 1,000+: 33%
- <1,000: 32%

LOB requests
- 1,000+: 31%
- <1,000: 25%

Re-organizations
- 1,000+: 25%
- <1,000: 22%

Mergers or acquisitions
- 1,000+: 24%
- <1,000: 23%

Internal skills shortages
- 1,000+: 26%
- <1,000: 21%

Changes in leadership
- 1,000+: 26%
- <1,000: 20%

Changes in physical office space
- 1,000+: 20%
- <1,000: 21%

Legend:
- 1,000+
- <1,000

Q: How will the following **internal events** influence technology purchase decisions over the next 12 months, if at all: < **Summary of Accelerator** >

FOUNDRY

Internal events accelerating technology purchase decisions

		North America	EMEA	APAC
Increased automation	53%	51%	56%	56%
Process changes	37%	31%	40%	43%
Governance/compliance requirements	32%	30%	31%	35%
LOB requests	28%	23%	26%	35%
Re-organizations	23%	15%	32%	30%
Mergers or acquisitions	23%	19%	23%	28%
Internal skills shortages	23%	18%	20%	30%
Changes in leadership	22%	18%	21%	28%
Changes in physical office space	20%	15%	16%	28%

Q: How will the following **internal events** influence technology purchase decisions over the next 12 months, if at all: < **Summary of Accelerator** >

Source: Foundry Role & Influence of the Technology Decision-Maker Survey, 2024

Internal events creating tech purchase barriers

Internal event	1,000+	<1,000
Internal skills shortages	42%	40%
Changes in leadership	33%	27%
Governance/compliance requirements	31%	26%
Re-organizations	31%	26%
Process changes	28%	20%
Mergers or acquisitions	28%	22%
LOB requests	19%	13%
Increased automation	16%	11%
Changes in physical office space	15%	13%

■ 1,000+
■ <1,000

Q: How will the following **internal events** influence technology purchase decisions over the next 12 months, if at all: < **Summary of Barrier** >

FOUNDRY

Internal events creating tech purchase barriers

		North America	EMEA	APAC
Internal skills shortages	41%	43%	44%	38%
Changes in leadership	30%	36%	26%	24%
Governance/compliance requirements	29%	30%	31%	26%
Re-organizations	29%	33%	29%	22%
Mergers or acquisitions	25%	25%	26%	23%
Process changes	24%	26%	26%	21%
LOB requests	16%	16%	18%	16%
Changes in physical office space	14%	13%	19%	13%
Increased automation	14%	13%	12%	15%

Q: How will the following **internal events** influence technology purchase decisions over the next 12 months, if at all: < **Summary of Barrier** >

External events accelerating technology purchase decisions

Customer requests
- 48% (1,000+)
- 50% (<1,000)

Breaking into new markets or product areas
- 44% (1,000+)
- 42% (<1,000)

Competitive threats
- 41% (1,000+)
- 33% (<1,000)

Market/economic changes
- 33% (1,000+)
- 34% (<1,000)

Government regulations
- 30% (1,000+)
- 26% (<1,000)

Environmental, Social and Governance (ESG) efforts/issues
- 29% (1,000+)
- 26% (<1,000)

Legend:
- 1,000+
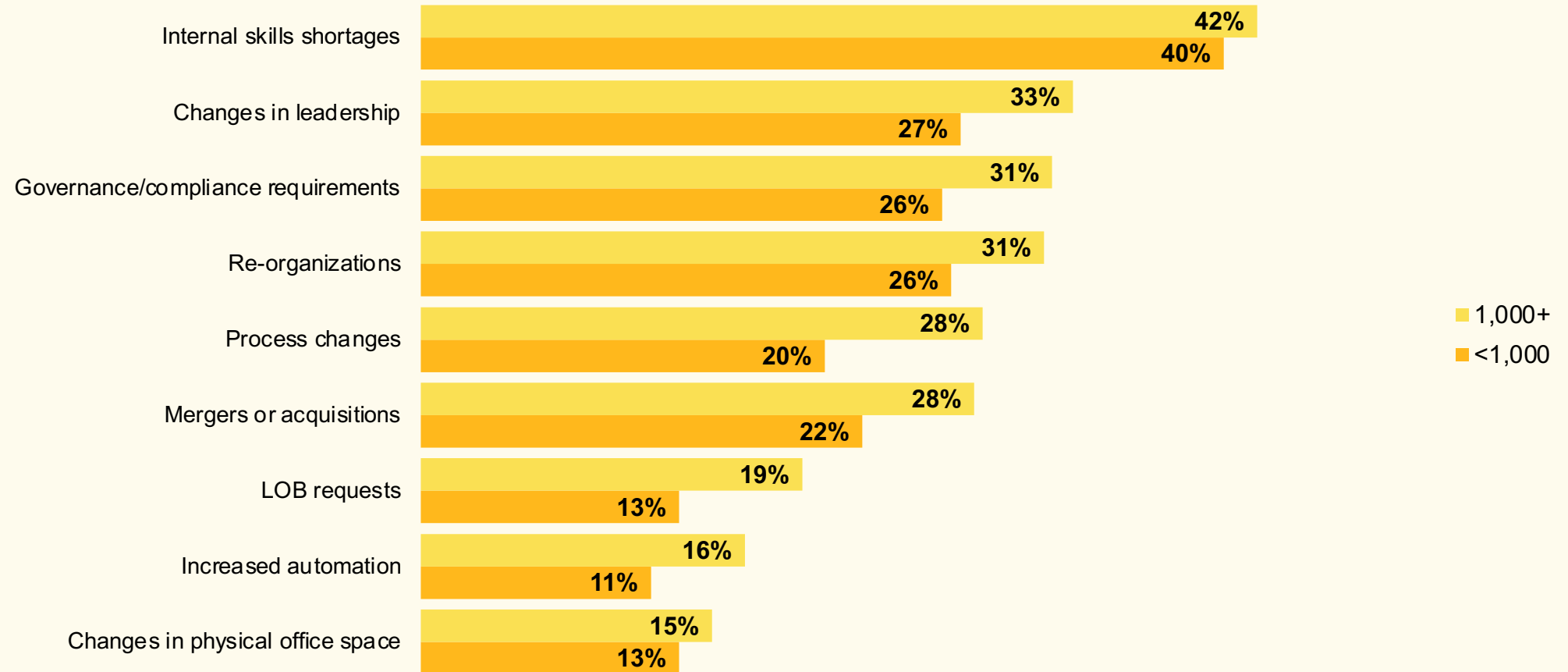- <1,000

Q: How will the following **external events** influence technology purchase decisions over the next 12 months, if at all: < **Summary of Accelerator** >

External events accelerating technology purchase decisions

	North America	EMEA	APAC
Customer requests — **49%**	44%	51%	55%
Breaking into new markets or product areas — **42%**	41%	45%	43%
Competitive threats — **37%**	35%	37%	39%
Market/economic changes — **33%**	30%	33%	37%
Government regulations — **28%**	25%	30%	30%
Environmental, Social and Governance (ESG) efforts/issues — **27%**	20%	28%	36%

Q: How will the following **external events** influence technology purchase decisions over the next 12 months, if at all: < **Summary of Accelerator** >

External events creating tech purchase barriers

Government regulations
- 1,000+: 33%
- <1,000: 30%

Market/economic changes
- 1,000+: 32%
- <1,000: 30%

Environmental, Social and Governance (ESG) efforts/issues
- 1,000+: 27%
- <1,000: 22%

Competitive threats
- 1,000+: 21%
- <1,000: 21%

Breaking into new markets or product areas
- 1,000+: 17%
- <1,000: 12%

Customer requests
- 1,000+: 12%
- <1,000: 10%
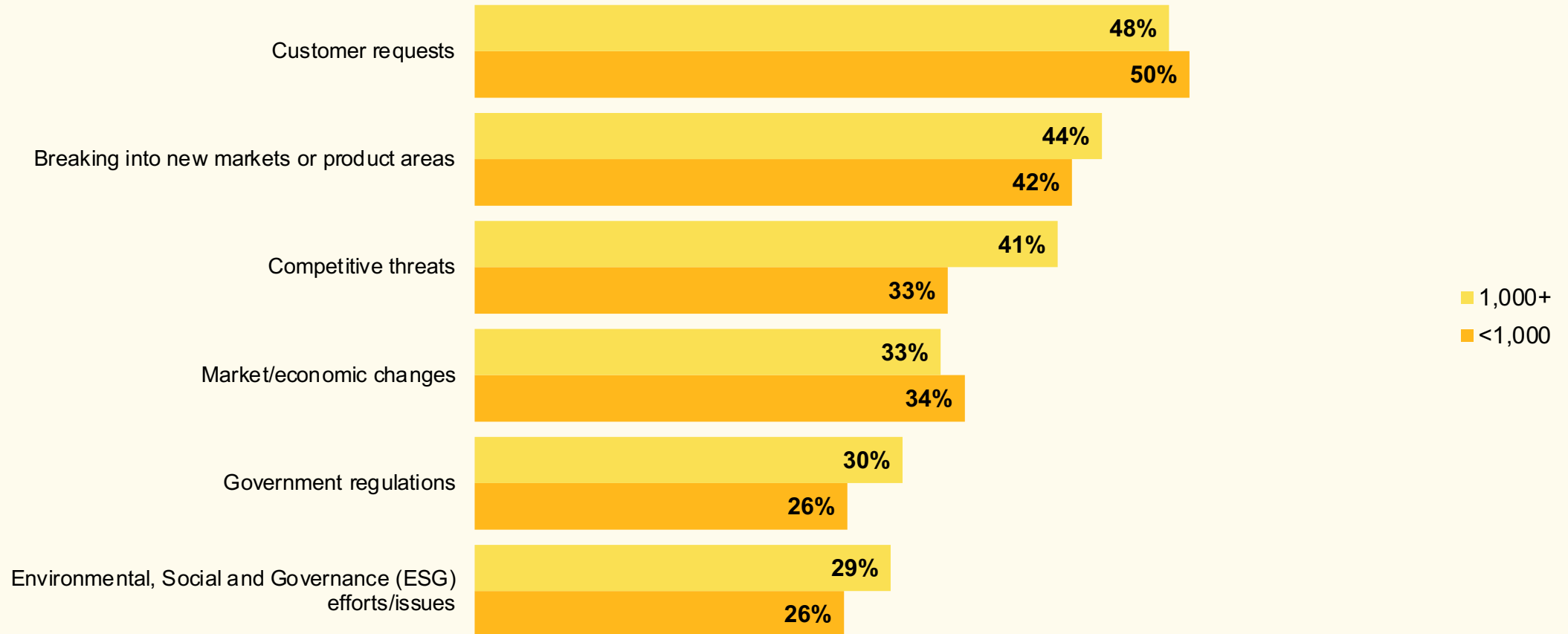
Legend:
- 1,000+
- <1,000

Q: How will the following **external events** influence technology purchase decisions over the next 12 months, if at all: < **Summary of Barrier** >

External events creating tech purchase barriers

	North America	EMEA	APAC
Government regulations — **32%**	32%	32%	30%
Market/economic changes — **31%**	34%	27%	28%
Environmental, Social and Governance (ESG) efforts/issues — **25%**	24%	26%	23%
Competitive threats — **21%**	20%	20%	22%
Breaking into new markets or product areas — **15%**	14%	14%	16%
Customer requests — **11%**	11%	10%	11%

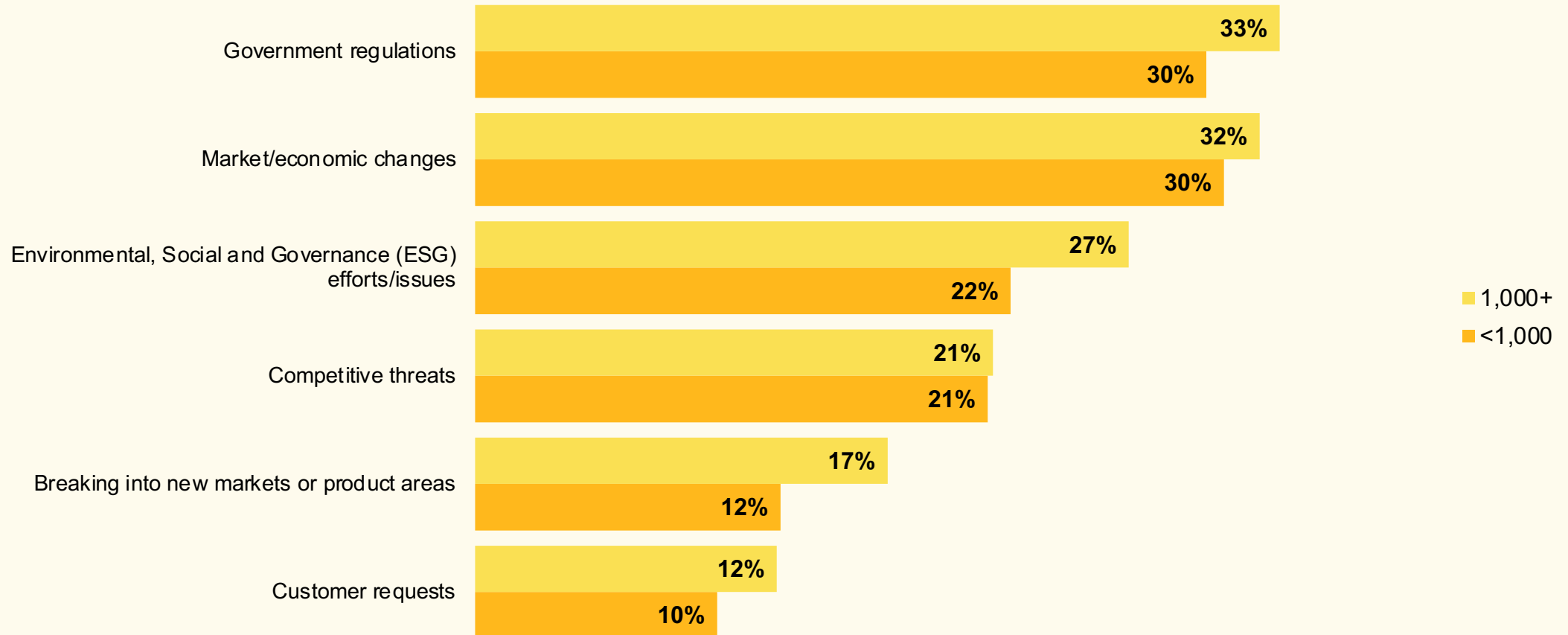Q: How will the following **external events** influence technology purchase decisions over the next 12 months, if at all: < **Summary of Barrier** >

FOUNDRY

Leadership throughout the purchase process (2023)

Key 1 2 3

	Determine the business need	Determine technical requirements	Evaluate products or services	Recommend and select vendors	Sell internally	Authorize and approve	Post-sales engagement
CIO or top IT Executive	39%	36%	37%	38%	32%	43%	26%
CEO	35%	14%	18%	14%	13%	41%	10%
LOB management	27%	18%	23%	18%	17%	15%	14%
IT management	24%	38%	38%	32%	21%	21%	23%
COO	24%	13%	16%	12%	13%	26%	10%
CTO	23%	27%	27%	24%	20%	24%	15%
Security staff	22%	38%	42%	27%	15%	9%	23%
Business relationship manager	20%	12%	17%	14%	16%	7%	13%
CSO/CISO or top security executive	19%	30%	30%	23%	14%	17%	13%
Engineer	19%	38%	37%	24%	12%	10%	21%
Architect	19%	34%	33%	25%	14%	9%	15%
CFO	19%	11%	13%	14%	12%	42%	8%
Security management	18%	28%	29%	20%	15%	14%	16%
CMO or top marketing executive	18%	9%	16%	13%	13%	9%	9%
Chief Data Officer or equivalent	17%	23%	22%	18%	16%	16%	13%
IT staff	17%	35%	35%	23%	11%	9%	16%
Chief Digital Officer or executive	15%	17%	19%	16%	13%	12%	8%
Software Engineer Developer	15%	30%	32%	19%	12%	8%	16%

Question: Including yourself, which of the following groups will be involved in each stage of the IT purchase process at your organization over the next 12 months?

Leadership throughout the purchase process

Key 1 2 3

	Determine the business need	Determine technical requirements	Evaluate products or services	Recommend and select vendors	Sell internally	Authorize and approve	Post-sales engagement
CEO	37%	15%	16%	16%	17%	36%	14%
CIO or top IT executive	34%	33%	32%	36%	32%	37%	28%
IT/networking management	28%	34%	32%	29%	23%	23%	24%
CSO/CISO or top security executive	23%	22%	22%	19%	16%	20%	14%
Line of business management	22%	17%	22%	18%	17%	16%	19%
Business relationship manager	22%	14%	17%	16%	17%	12%	17%
CFO	21%	10%	12%	13%	15%	31%	10%
CTO	21%	24%	23%	23%	21%	20%	19%
COO	21%	12%	14%	13%	16%	20%	12%
Chief Data Officer or equivalent	19%	20%	22%	20%	18%	17%	18%
CMO or top marketing executive	19%	12%	14%	14%	14%	15%	13%
Chief Digital Officer or equivalent	19%	18%	17%	19%	15%	17%	14%
IT/networking staff	18%	29%	27%	18%	12%	7%	23%
Security management	16%	24%	23%	19%	15%	17%	16%
Engineer	16%	25%	26%	16%	8%	4%	18%
Architect	16%	26%	25%	18%	11%	5%	17%
Software Engineer/Developer	15%	23%	24%	15%	10%	7%	18%
Data scientist	15%	20%	19%	15%	12%	7%	15%
Chief AI officer	14%	17%	16%	13%	11%	8%	12%
Security Staff	11%	18%	17%	12%	7%	6%	15%

Question: Including yourself, which of the following groups will be involved in each stage of the IT purchase process at your organization over the next 12 months?

FOUNDRY

Source: Foundry Role & Influence of the Technology Decision-Maker Survey, 2024

78

Leadership throughout the purchase process (<1,000 company size)

Key: 1 2 3

	Determine the business need	Determine technical requirements	Evaluate products or services	Recommend and select vendors	Sell internally	Authorize and approve	Post-sales engagement
CEO	43%	20%	21%	20%	21%	43%	16%
CIO or top IT executive	32%	32%	34%	35%	28%	32%	27%
IT/networking management	26%	32%	30%	27%	21%	19%	21%
CSO/CISO or top security executive	21%	19%	22%	18%	15%	19%	14%
Line of business management	19%	15%	19%	16%	14%	14%	15%
Business relationship manager	21%	11%	14%	14%	14%	10%	16%
CFO	21%	10%	13%	12%	17%	31%	10%
CTO	20%	22%	22%	20%	17%	17%	16%
COO	20%	13%	14%	13%	18%	19%	11%
Chief Data Officer or equivalent	17%	18%	21%	18%	15%	13%	17%
CMO or top marketing executive	17%	12%	12%	13%	14%	12%	11%
Chief Digital Officer or equivalent	19%	16%	16%	16%	13%	15%	13%
IT/networking staff	18%	28%	25%	18%	12%	8%	21%
Security management	15%	20%	19%	16%	12%	14%	13%
Engineer	16%	23%	23%	14%	8%	3%	15%
Architect	13%	23%	21%	14%	8%	4%	14%
Software Engineer/Developer	15%	21%	23%	16%	8%	6%	14%
Data scientist	13%	16%	16%	13%	10%	6%	14%
Chief AI officer	12%	14%	16%	11%	9%	6%	10%
Security Staff	11%	15%	15%	12%	6%	5%	13%

Question: Including yourself, which of the following groups will be involved in each stage of the IT purchase process at your organization over the next 12 months? (<1,000 company size)

Leadership throughout the purchase process (1,000+ company size)

Key 1 2 3

	Determine the business need	Determine technical requirements	Evaluate products or services	Recommend and select vendors	Sell internally	Authorize and approve	Post-sales engagement
CEO	32%	11%	12%	12%	13%	30%	13%
CIO or top IT executive	36%	34%	31%	38%	36%	42%	28%
IT/networking management	29%	35%	34%	30%	26%	26%	27%
CSO/CISO or top security executive	26%	24%	23%	20%	17%	21%	14%
Line of business management	25%	18%	25%	20%	20%	18%	22%
Business relationship manager	23%	17%	19%	17%	20%	14%	18%
CFO	21%	10%	11%	14%	15%	33%	10%
CTO	22%	27%	23%	25%	24%	22%	21%
COO	21%	10%	15%	13%	15%	22%	13%
Chief Data Officer or equivalent	22%	22%	24%	22%	21%	20%	19%
CMO or top marketing executive	21%	12%	15%	14%	15%	18%	14%
Chief Digital Officer or equivalent	19%	20%	19%	22%	18%	19%	14%
IT/networking staff	18%	29%	29%	18%	12%	7%	24%
Security management	18%	27%	27%	21%	18%	19%	19%
Engineer	16%	28%	29%	18%	9%	5%	20%
Architect	18%	30%	29%	21%	13%	6%	19%
Software Engineer/Developer	16%	26%	25%	14%	11%	7%	21%
Data scientist	18%	23%	22%	18%	14%	8%	16%
Chief AI officer	16%	20%	16%	14%	13%	10%	14%
Security Staff	11%	20%	20%	11%	8%	7%	16%

Question: Including yourself, which of the following groups will be involved in each stage of the IT purchase process at your organization over the next 12 months? (1,000+ company size)

Job titles becoming recently and more involved in tech purchases

Recently involved

Job Title	1,000+	<1,000
CIO or top IT executive	28%	24%
CEO	22%	31%
CFO	21%	19%
CTO	20%	15%
IT/networking management	18%	18%
Architect	18%	10%
COO	17%	14%
Chief Data Officer or equivalent	17%	10%
Security management	16%	10%
IT/networking staff	16%	11%

More involved

Job Title	1,000+	<1,000
CIO or top IT executive	24%	22%
IT/networking management	20%	18%
CTO	17%	15%
CFO	17%	15%
Architect	17%	10%
Chief Data Officer or equivalent	17%	11%
CSO/CISO or top security executive	17%	13%
CEO	17%	24%
Security management	17%	10%
Chief AI officer	15%	10%

Legend: 1,000+ / <1,000

Q: Of the individuals you selected who are involved in the technology purchase process, which have recently become involved and which ones have become more involved in the past 12 months:

FOUNDRY

Job titles recently involved in the tech purchase process

Job Title	1,000+
CIO or top IT executive	28%
CEO	22%
CFO	21%
CTO	20%
IT/networking management	18%
Architect	18%
COO	17%
Chief Data Officer or equivalent	17%
Security management	16%
IT/networking staff	16%
Line of business management	15%
Business relationship manager	15%
Data scientist	15%
CSO/CISO or top security executive	14%
Software Engineer/Developer	14%
Engineer	14%
Chief AI officer	13%
Chief Digital Officer or equivalent	12%
Security Staff	11%
CMO or top marketing executive	10%
None of the above	11%

■ 1,000+

Q: Of the individuals you selected who are involved in the technology purchase process, which have recently become involved and which ones have become more involved in the past 12 months: (1,000+ company size)

FOUNDRY

Job titles recently involved in the tech purchase process

Job Title	<1,000
CEO	31%
CIO or top IT executive	24%
CFO	19%
IT/networking management	18%
CTO	15%
COO	14%
Data scientist	13%
IT/networking staff	11%
Engineer	11%
CSO/CISO or top security executive	11%
Architect	10%
Business relationship manager	10%
Security management (Vice President/Director/Manager)	10%
Line of business management	10%
Chief Data Officer or equivalent	10%
Chief AI officer	9%
Chief Digital Officer or equivalent	9%
Security Staff	8%
CMO or top marketing executive	7%
Software Engineer/Developer	7%
None of the above	20%

Q: Of the individuals you selected who are involved in the technology purchase process, which have recently become involved and which ones have become more involved in the past 12 months: (<1,000 company size)

Job titles more involved in the tech purchase process

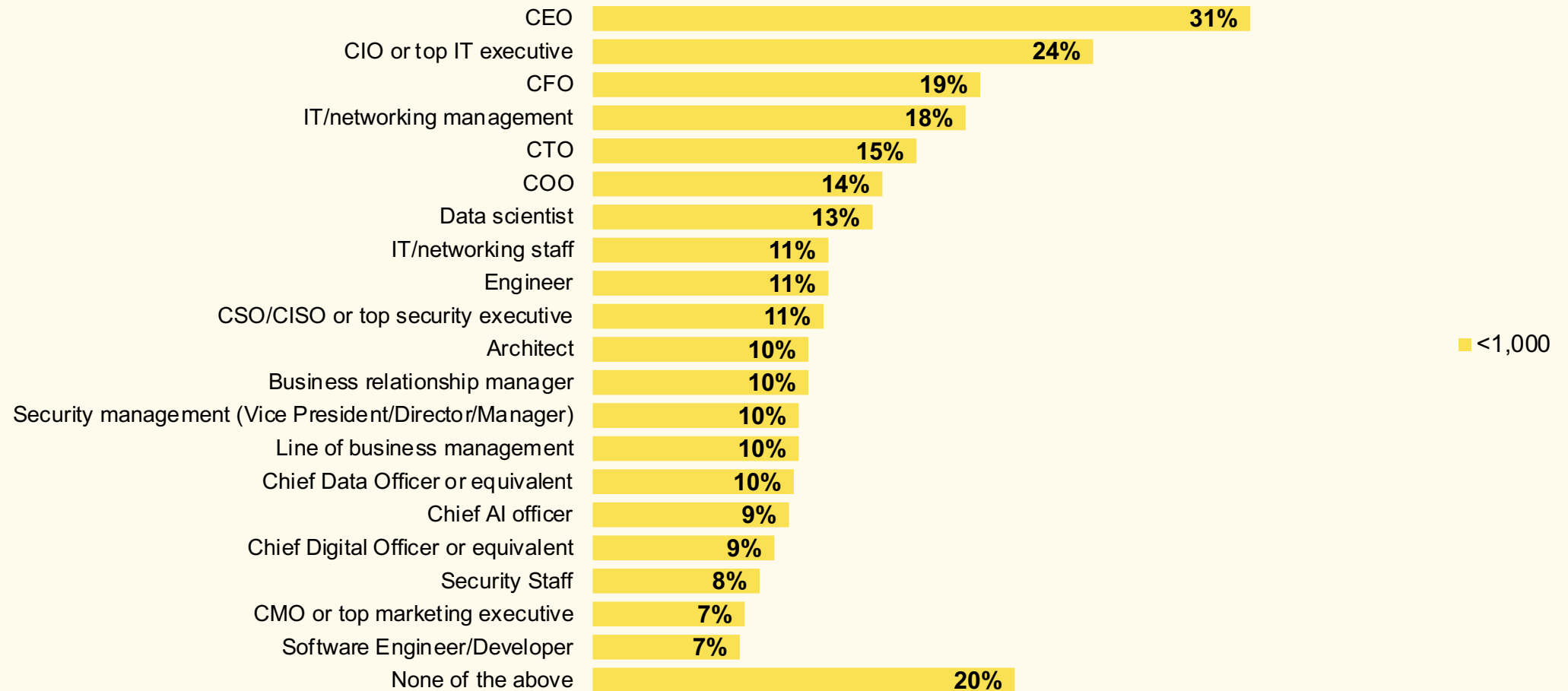| Job Title	1,000+
CIO or top IT executive	24%
IT/networking management	20%
CTO	18%
CFO	18%
Architect	17%
Chief Data Officer or equivalent	17%
CSO/CISO or top security executive	17%
CEO	16%
Security management	16%
Chief AI officer	15%
Line of business management	15%
Engineer	15%
COO	15%
Chief Digital Officer or equivalent	14%
Data scientist	14%
Business relationship manager	13%
IT/networking staff	12%
Software Engineer/Developer	11%
CMO or top marketing executive	11%
None of the above	12%

■ 1,000+

Q: Of the individuals you selected who are involved in the technology purchase process, which have recently become involved and which ones have become more involved in the past 12 months: (1,000+ company size)

FOUNDRY

Job titles more involved in the tech purchase process

Job Title	Percentage
CEO	25%
CIO or top IT executive	21%
IT/networking management	16%
CTO	15%
CFO	15%
CSO/CISO or top security executive	13%
COO	13%
Business relationship manager	13%
Engineer	12%
Chief Data Officer or equivalent	11%
Line of business management	11%
Architect	11%
Chief AI officer	10%
IT/networking staff	10%
Chief Digital Officer or equivalent	9%
Security management	9%
Data scientist	8%
CMO or top marketing executive	8%
Software Engineer/Developer	8%
None of the above	22%

■ <1,000

Q: Of the individuals you selected who are involved in the technology purchase process, which have recently become involved and which ones have become more involved in the past 12 months: (<1,000 company size)
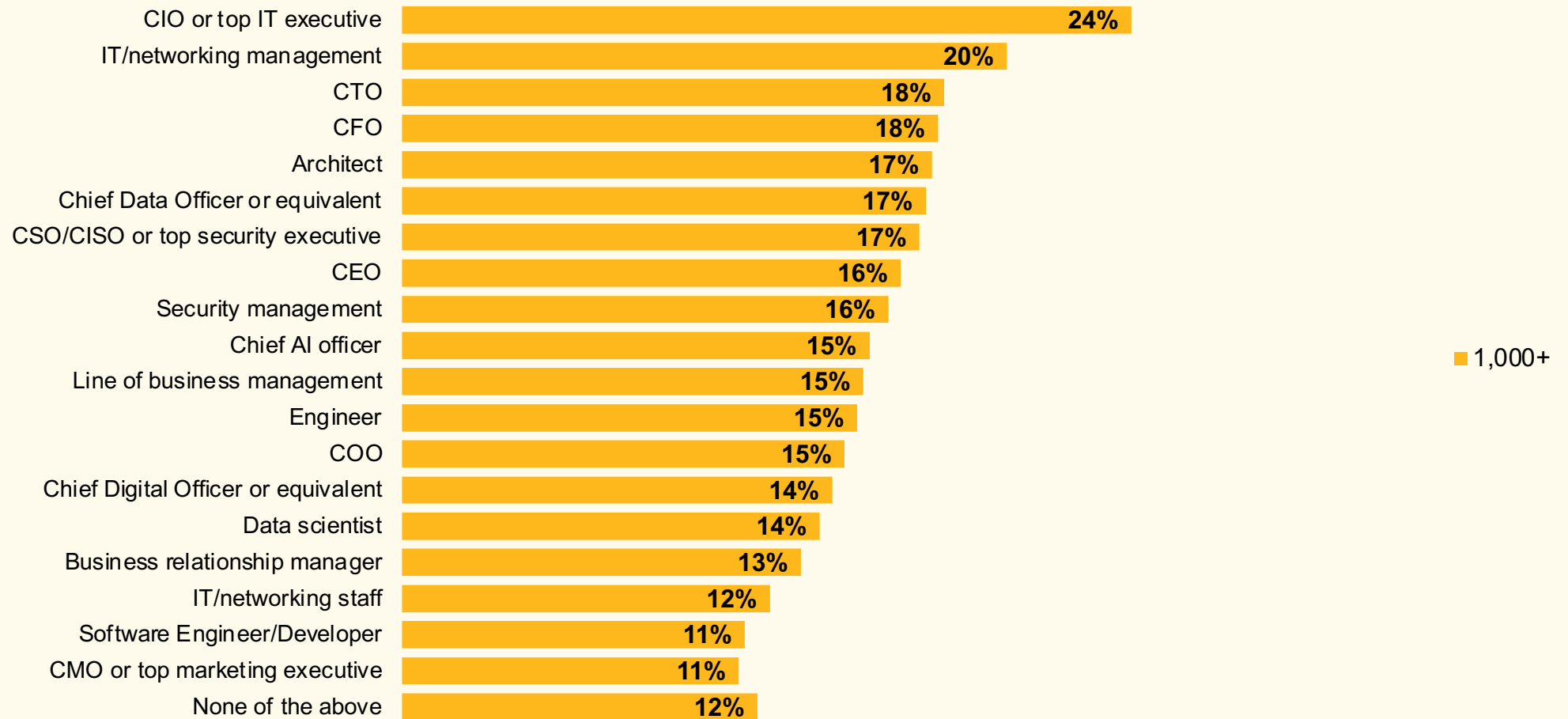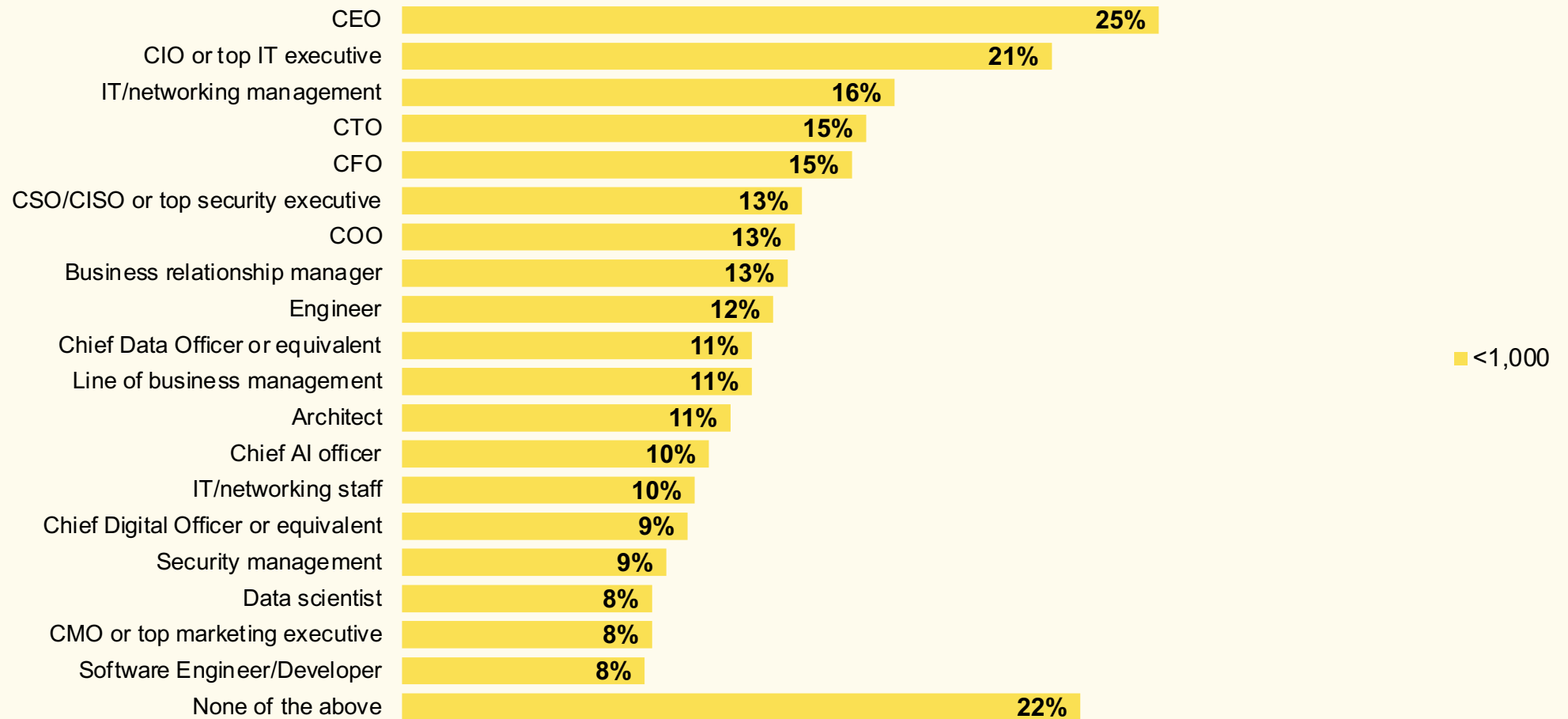
Source: Foundry Role & Influence of the Technology Decision-Maker Survey, 2024

More and more voices being heard during the purchase process

28
average number
of influencers

2023 average: **25**
2022 average: **20**
2021 average: **21**

	IT average	LOB average
Overall	**15**	**13**
1,000+	**17**	**15**
<1,000	**12**	**10**

	IT average	LOB average
NA	**13**	**12**
EMEA	**14**	**14**
APAC	**17**	**14**

Q.17: Please estimate the total number of people (including yourself), on average, involved in influencing enterprise technology purchases within your organization:

Podcasts listened to for new tech launches and trends

61%

of ITDMs have listened to a business-related podcast in the past year

1,000+	**65%**
<1,000	**59%**
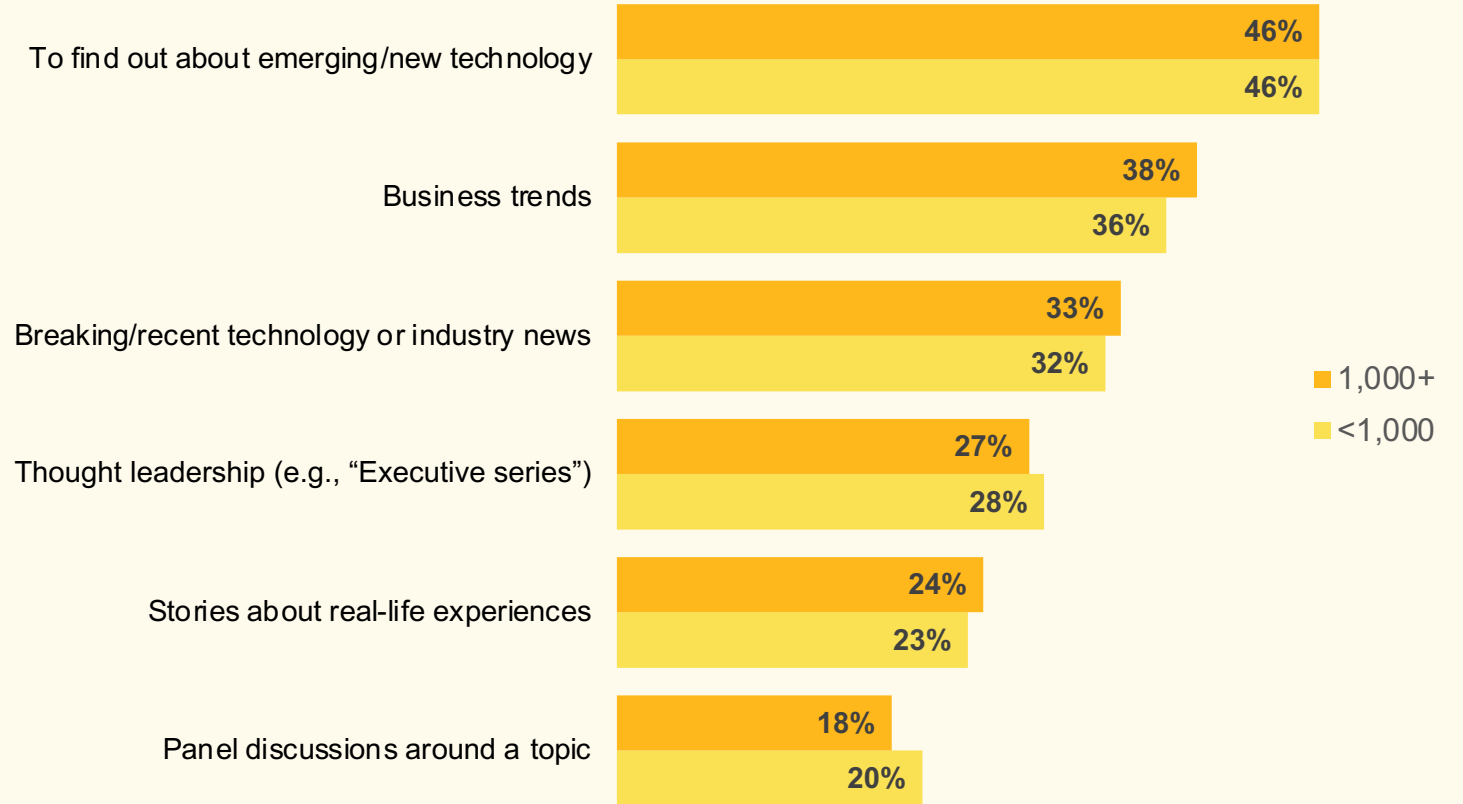
To find out about emerging/new technology
- 46% (1,000+)
- 46% (<1,000)

Business trends
- 38% (1,000+)
- 36% (<1,000)

Breaking/recent technology or industry news
- 33% (1,000+)
- 32% (<1,000)

Thought leadership (e.g., "Executive series")
- 27% (1,000+)
- 28% (<1,000)

Stories about real-life experiences
- 24% (1,000+)
- 23% (<1,000)

Panel discussions around a topic
- 18% (1,000+)
- 20% (<1,000)

Legend: 1,000+ / <1,000

Q: Have you listened to a business-related podcast in the past 12 months? Q: What were your top 2 reasons for listening to a business-related podcast?

Podcasts listened to for new tech launches and trends

61%

of ITDMs have listened to a business-related podcast in the past year

NA	66%
EMEA	59%
APAC	57%

To find out about emerging/new technology
- NA: 47%
- EMEA: 47%
- APAC: 44%

Business trends
- NA: 34%
- EMEA: 42%
- APAC: 39%

Breaking/recent technology or industry news
- NA: 31%
- EMEA: 31%
- APAC: 36%

Thought leadership (e.g., "Executive series")
- NA: 30%
- EMEA: 26%
- APAC: 25%

Stories about real-life experiences
- NA: 23%
- EMEA: 21%
- APAC: 26%

Panel discussions around a topic
- NA: 22%
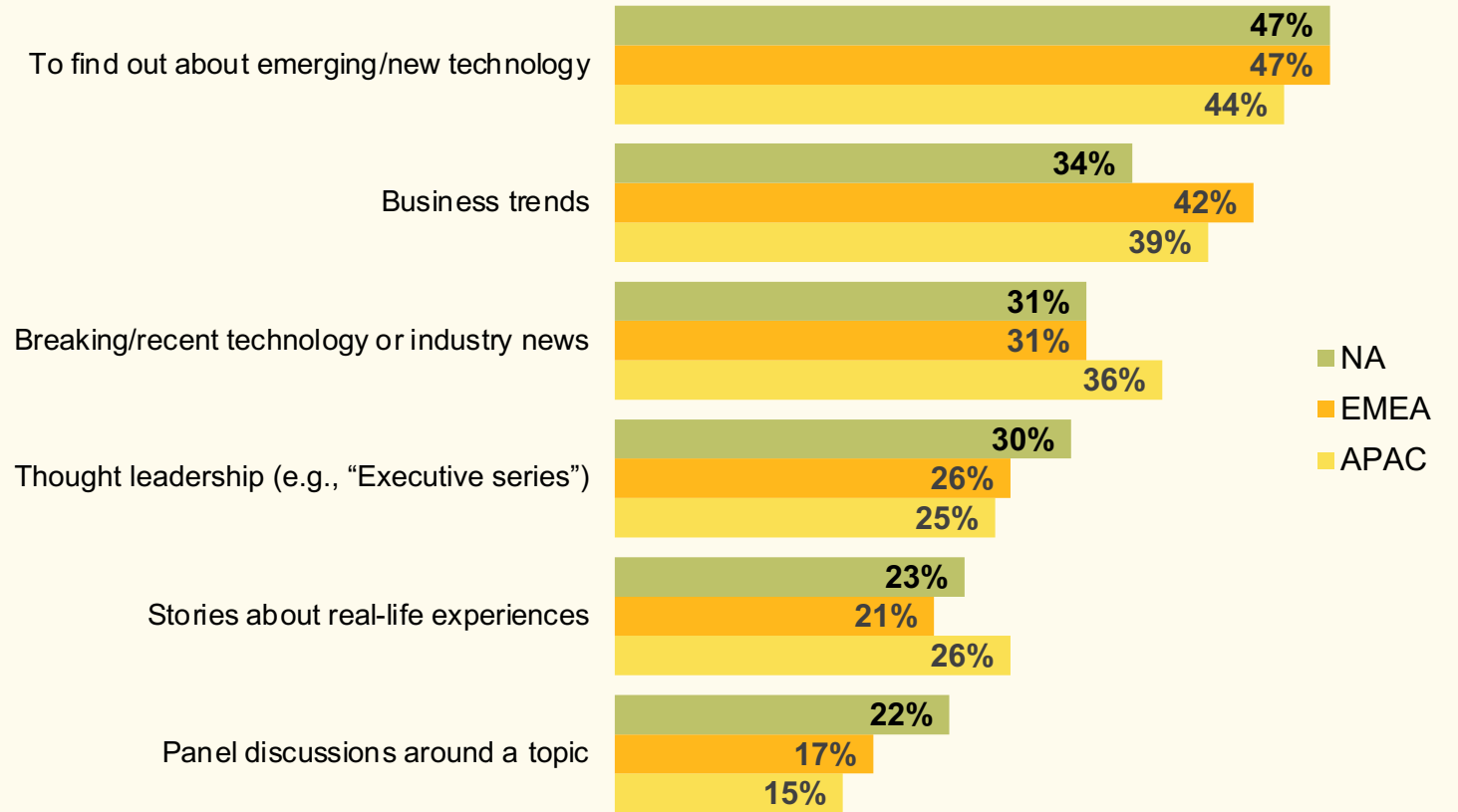- EMEA: 17%
- APAC: 15%

Legend:
- NA
- EMEA
- APAC

Q: Have you listened to a business-related podcast in the past 12 months? Q: What were your top 2 reasons for listening to a business-related podcast?

Video content is a powerful way to reach ITDMs

95%
of ITDMs watch technology-related videos

1,000+	**96%**
<1,000	**96%**
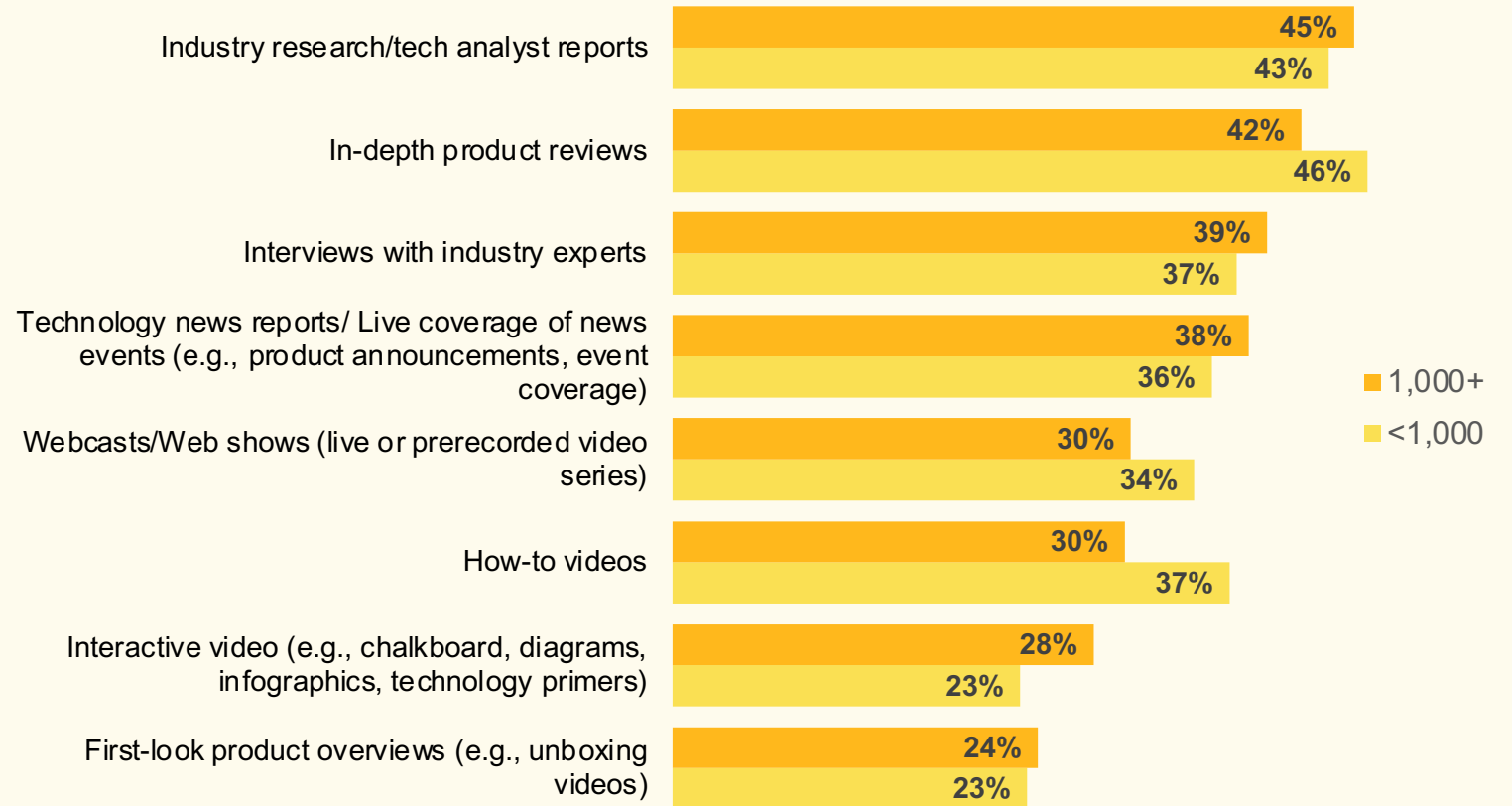
Industry research/tech analyst reports
- 1,000+: 45%
- <1,000: 43%

In-depth product reviews
- 1,000+: 42%
- <1,000: 46%

Interviews with industry experts
- 1,000+: 39%
- <1,000: 37%

Technology news reports/ Live coverage of news events (e.g., product announcements, event coverage)
- 1,000+: 38%
- <1,000: 36%

Webcasts/Web shows (live or prerecorded video series)
- 1,000+: 30%
- <1,000: 34%

How-to videos
- 1,000+: 30%
- <1,000: 37%

Interactive video (e.g., chalkboard, diagrams, infographics, technology primers)
- 1,000+: 28%
- <1,000: 23%

First-look product overviews (e.g., unboxing videos)
- 1,000+: 24%
- <1,000: 23%

■ 1,000+
■ <1,000

Q: Which of the following types of technology-related video content are you likely to watch for business purposes?

FOUNDRY

Video content is a powerful way to reach ITDMs

95%
of ITDMs watch technology-related videos

NA	**95%**
EMEA	**96%**
APAC	**96%**

In-depth product reviews
- NA **47%**
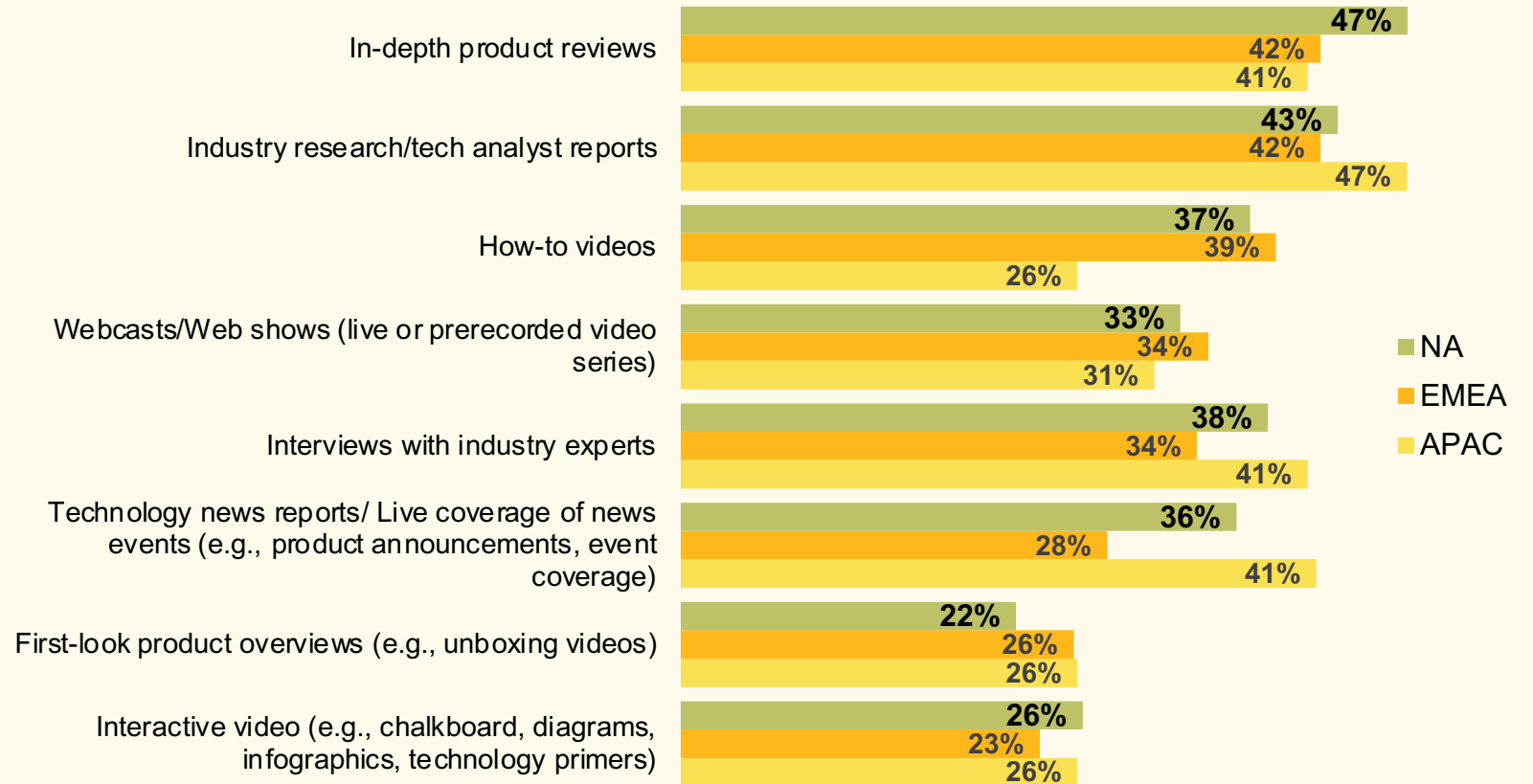- EMEA **42%**
- APAC **41%**

Industry research/tech analyst reports
- NA **43%**
- EMEA **42%**
- APAC **47%**

How-to videos
- NA **37%**
- EMEA **39%**
- APAC **26%**

Webcasts/Web shows (live or prerecorded video series)
- NA **33%**
- EMEA **34%**
- APAC **31%**

Interviews with industry experts
- NA **38%**
- EMEA **34%**
- APAC **41%**

Technology news reports/ Live coverage of news events (e.g., product announcements, event coverage)
- NA **36%**
- EMEA **28%**
- APAC **41%**

First-look product overviews (e.g., unboxing videos)
- NA **22%**
- EMEA **26%**
- APAC **26%**

Interactive video (e.g., chalkboard, diagrams, infographics, technology primers)
- NA **26%**
- EMEA **23%**
- APAC **26%**

- NA
- EMEA
- APAC

Q: Which of the following types of technology-related video content are you likely to watch for business purposes?

ITDMs engaging with webcasts

64%

of IT decision-makers have registered
for a **live webcast** in the past 12 months
for work-related purposes

| 1,000+ | **68%** |
| <1,000 | **62%** |

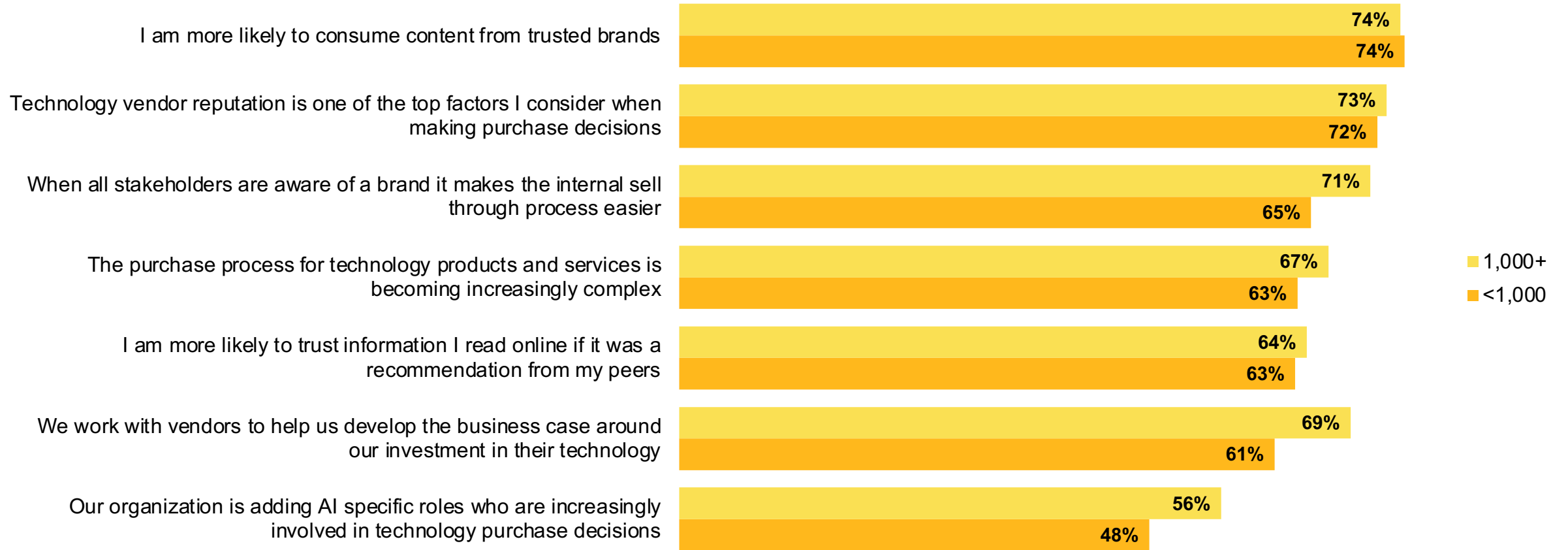|			
Executive IT	**67%**	NA	**73%**
Mid-level IT	**66%**	EMEA	**62%**
IT professional	**36%**	APAC	**54%**
Business mgmt.	**75%**		

65%

of IT decision-makers have watched
for a **live webcast** in the past 12 months
for work-related purposes

| 1,000+ | **68%** |
| <1,000 | **62%** |

Executive IT	**67%**	NA	**73%**
Mid-level IT	**64%**	EMEA	**63%**
IT professional	**43%**	APAC	**55%**
Business mgmt.	**67%**		

Q: Have you registered for a live webcast in the past 12 months for work-related purposes? Q: Have you watched an on-demand webcast in the past 12 months for work-related purposes?
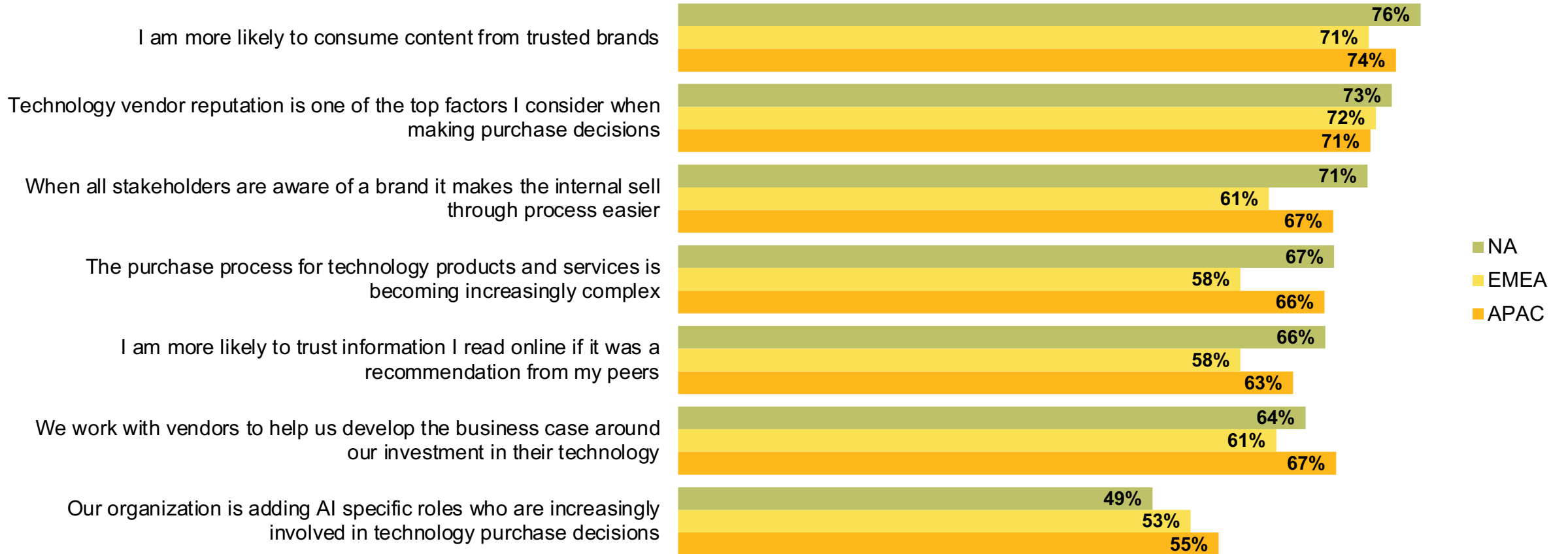
Company size agree/disagree statements

I am more likely to consume content from trusted brands
- 1,000+: 74%
- <1,000: 74%

Technology vendor reputation is one of the top factors I consider when making purchase decisions
- 1,000+: 73%
- <1,000: 72%

When all stakeholders are aware of a brand it makes the internal sell through process easier
- 1,000+: 71%
- <1,000: 65%

The purchase process for technology products and services is becoming increasingly complex
- 1,000+: 67%
- <1,000: 63%

I am more likely to trust information I read online if it was a recommendation from my peers
- 1,000+: 64%
- <1,000: 63%

We work with vendors to help us develop the business case around our investment in their technology
- 1,000+: 69%
- <1,000: 61%

Our organization is adding AI specific roles who are increasingly involved in technology purchase decisions
- 1,000+: 56%
- <1,000: 48%

Legend: 1,000+ / <1,000

Q: What would prompt you to seek a new vendor for any technology purchase? (<1,000 company size respondents)

Regional agree/disagree statements

I am more likely to consume content from trusted brands
- NA: 76%
- EMEA: 71%
- APAC: 74%

Technology vendor reputation is one of the top factors I consider when making purchase decisions
- NA: 73%
- EMEA: 72%
- APAC: 71%

When all stakeholders are aware of a brand it makes the internal sell through process easier
- NA: 71%
- EMEA: 61%
- APAC: 67%

The purchase process for technology products and services is becoming increasingly complex
- NA: 67%
- EMEA: 58%
- APAC: 66%

I am more likely to trust information I read online if it was a recommendation from my peers
- NA: 66%
- EMEA: 58%
- APAC: 63%

We work with vendors to help us develop the business case around our investment in their technology
- NA: 64%
- EMEA: 61%
- APAC: 67%

Our organization is adding AI specific roles who are increasingly involved in technology purchase decisions
- NA: 49%
- EMEA: 53%
- APAC: 55%

Legend: ■ NA ■ EMEA ■ APAC

Q: What would prompt you to seek a new vendor for any technology purchase? (<1,000 company size respondents)

FOUNDRY

Existing vendors don't always have an edge

Purchase from
an existing vendor
52%

Seek a new vendor
48%

39%

will purchase from a new vendor because the vendor/product is more innovative or feature rich

Question: For each purchase, please indicate whether you sought or will seek a new vendor or purchase from an existing vendor. **Question:** What would prompt you to seek a new vendor for any technology purchase?

Innovation, business needs and cost prompt a vendor switch

1
New vendor/product
is more innovative
or feature rich

2
Current product/
service no longer
met business needs

3
Increased cost/level
of investment required
by current vendor

Question: What would prompt you to seek a new vendor for any technology purchase?

Advancing through the purchase process with help from vendors

48%
will seek a new vendor for tech purchases – mostly due to innovation, business need and cost

94%
need additional resources or assistance from vendors throughout the technology purchase process

65%
work with vendors to help them develop the business case around their investment in the technology

Question: Please rate your level of agreement with the following statements:

Tech buyers seek trust and brand awareness when researching

74%
are more likely to consume content from trusted brands

68%
say that when all stakeholders are aware of a brand it makes the internal sell through process easier

63%
are more likely to trust information read online if it was a recommendation from peers

Question: Please rate your level of agreement with the following statements:

Advancing through the purchase process with help from vendors

94%

of ITDMs need additional resources or assistance from vendors throughout the technology purchase process

65%

work with vendors to help them develop the business case around their investment in the technology

Question: Please rate your level of agreement with the following statements: AND **Question:** During which stage(s) of the process are you most likely to need additional resources or assistance from a vendor?

Source: Foundry Role & Influence of the Technology Decision-Maker Survey, 2024