BRANDS IN *MOTION*

TECH B2B CATEGORY

TECH B2B *CATEGORY*

United States

MOVER ●

United Kingdom

AGITATOR ●

China

MOVER ●

Germany

MOVER ●

Australia

MOVER ●

South Africa

MOVER ●
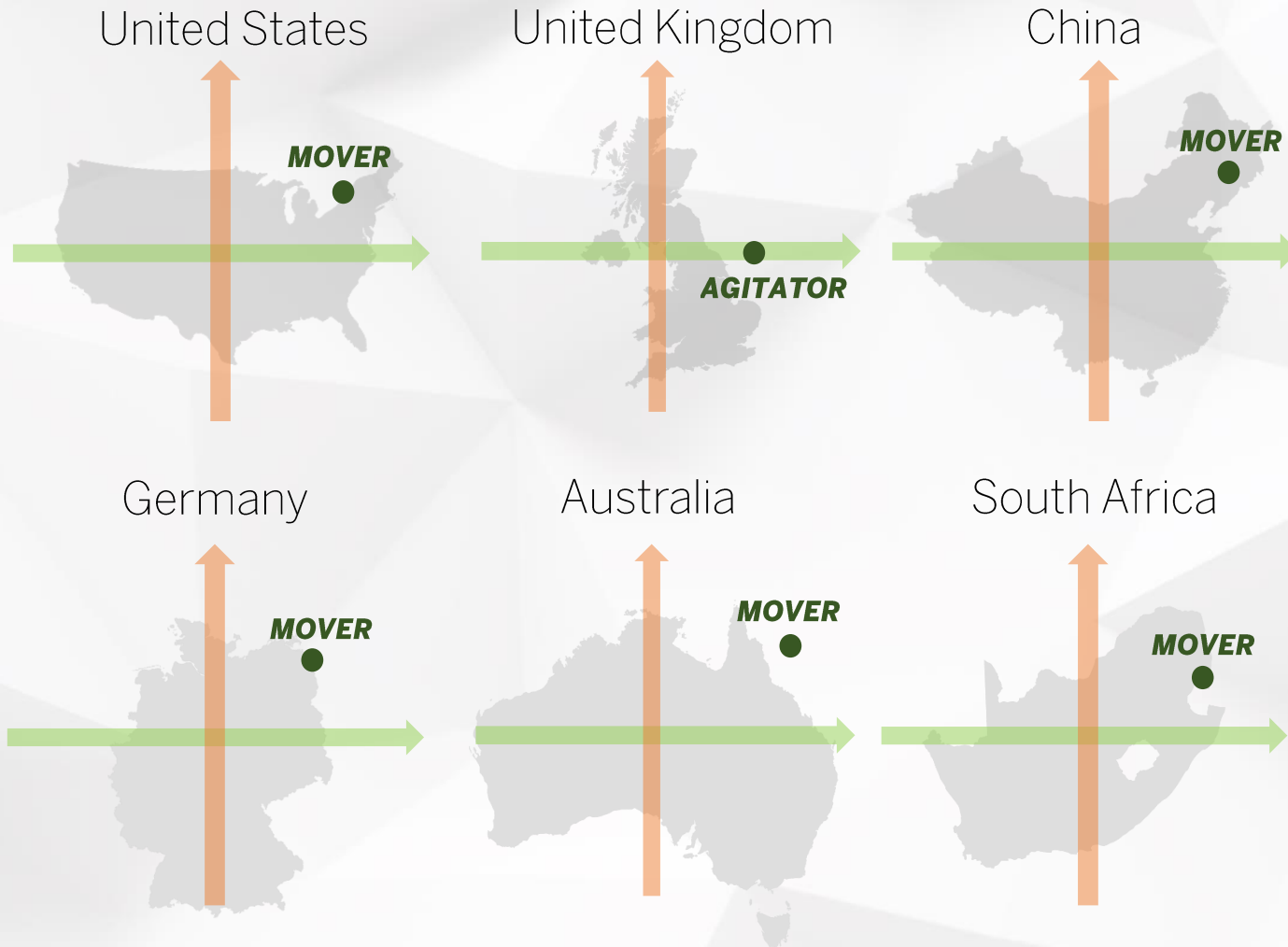
BUSINESS TECHNOLOGY SOLUTIONS:

Including server, networking, data or storage solutions; software; desktop or laptop computers; smartphones, tablets or other mobile devices; cybersecurity or identity management products and services; business analytics or data analysis solutions; and specialized industry technologies (programmable machines, networking solutions, Internet of Things)

The category is seen as a mover in all markets surveyed, based on the average emotional and rational responses of those surveyed.

A total of 6x735 people answered questions specific to the Tech B2B category across the six different markets.

(US: 769, UK:1031, China: 2031, South Africa: 1062, Australia: 1086, Germany: 756)

GLOBAL VIEW: *TECH B2B*

	United States	United Kingdom	China	Germany	Australia	South Africa
Emotional	44.3	23.6	56.0	31.6	41.8	52.1
Rational	45.9	20.0	58.9	32.7	42.5	52.6

■ Emotional   ■ Rational

OBSERVATIONS

- China has the most optimism for the category both rationally and emotionally with the highest average responses of any market surveyed.

- UK respondents showed the most skepticism for the category with the lowest average emotional and rational responses of any market surveyed.

Data represents an average respondent score on a scale of -100 to 100 across the ten category drivers. (6 Emotional and 4 Rational)
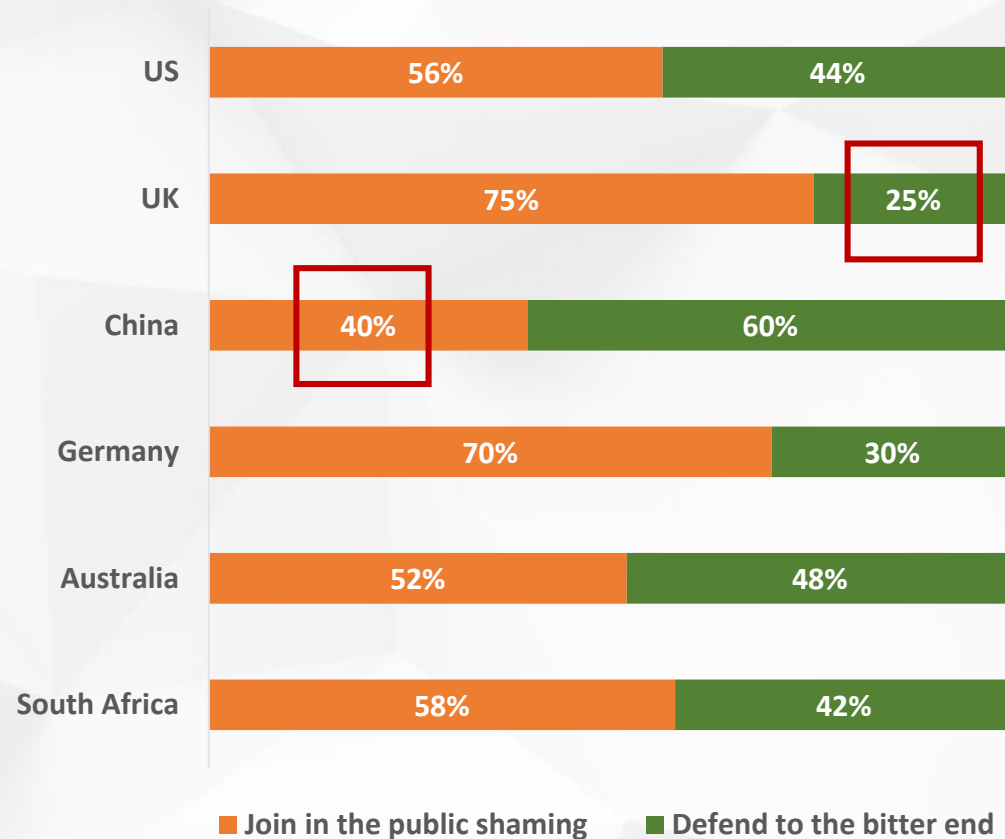
GLOBAL VIEW: *EMOTIONAL DRIVER*

Country	Join in the public shaming	Defend to the bitter end
US	56%	44%
UK	75%	25%
China	40%	60%
Germany	70%	30%
Australia	52%	48%
South Africa	58%	42%

■ **Join in the public shaming**   ■ **Defend to the bitter end**
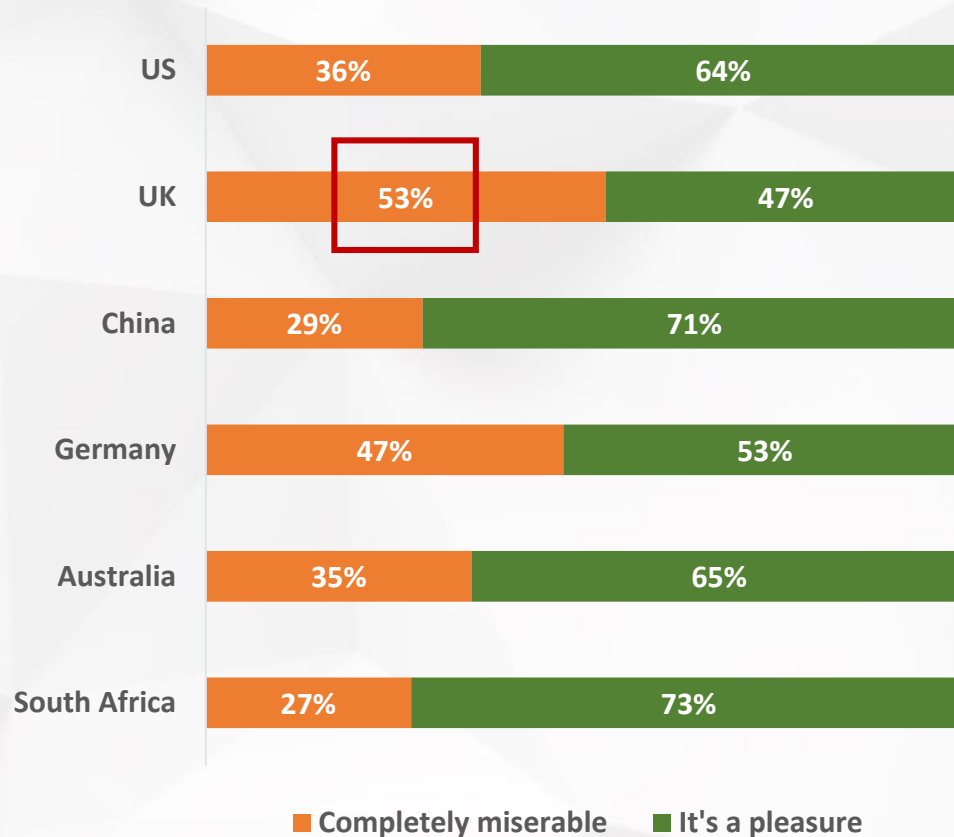
DEFEND OR SHAME

Suppose a Tech B2B Company was publicly under attack for a product or service issue, would you?

- China was the only market to have <u>less</u> than 50% of respondents indicate they would "Join in on the public shaming". Only market and category that can say this in the entire Brands in Motion study.

Percentages represent the percent of respondents who responded above or below the average emotional score by market.

GLOBAL VIEW: *EMOTIONAL DRIVER*

	Completely miserable	It's a pleasure
US	36%	64%
UK	53%	47%
China	29%	71%
Germany	47%	53%
Australia	35%	65%
South Africa	27%	73%

■ Completely miserable   ■ It's a pleasure

EXPERIENCE

When interacting with Tech B2B Companies, generally how is the experience?

- At 53%, UK was the only market surveyed that had the majority of respondents indicate "completely miserable" when asked about the experience with Tech B2B companies.

Percentages represent the percent of respondents who responded above or below the average emotional score by market.

GLOBAL VIEW: *EMOTIONAL DRIVER*

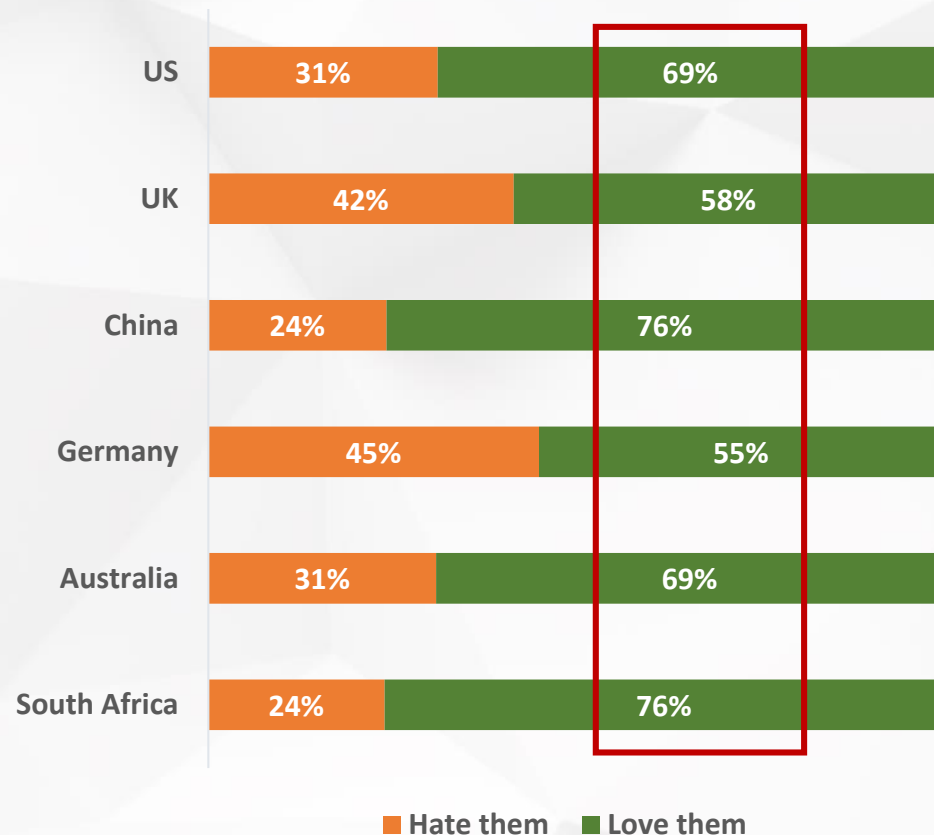| Country	Good Riddance	I need it back!
US	32%	68%
UK	49%	51%
China	29%	71%
Germany	44%	56%
Australia	34%	66%
South Africa	25%	75%

■ Good Riddance   ■ I need it back!

DISAPPEARED

If the Tech B2B were to one day just disappear, how would you feel?

- UK respondents indicate their lack of emotional connection with the category with nearly half of the respondents responding with "Good Riddance".

Percentages represent the percent of respondents who responded above or below the average emotional score by market.

GLOBAL VIEW: *EMOTIONAL DRIVER*

	Hate them	Love them
US	31%	69%
UK	42%	58%
China	24%	76%
Germany	45%	55%
Australia	31%	69%
South Africa	24%	76%

■ Hate them ■ Love them

LOVE/HATE
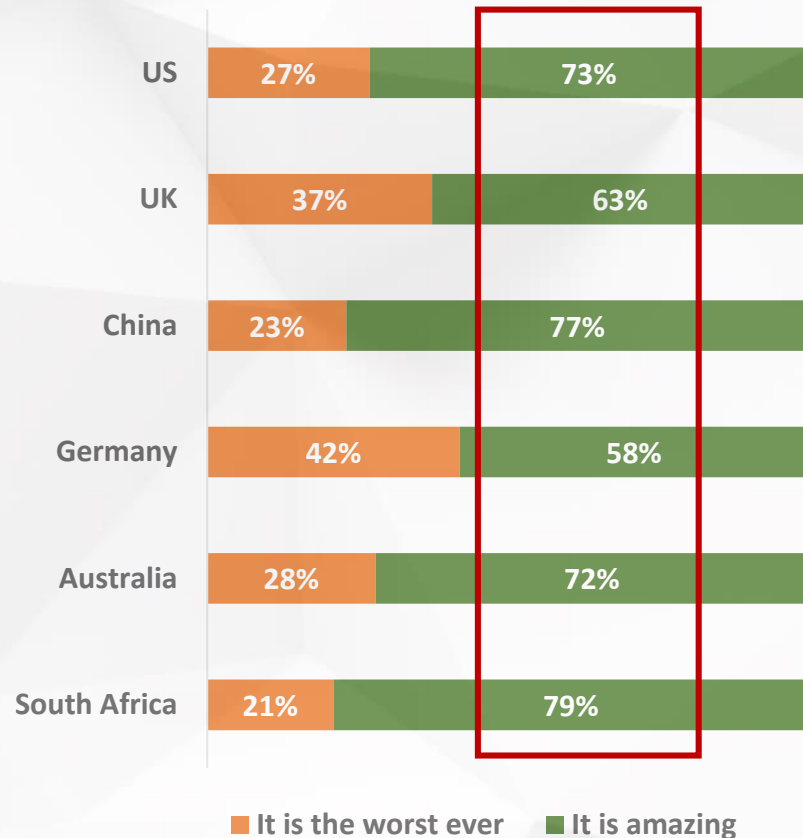
When thinking about Tech B2B companies do you generally...?

- In all markets, over half of the respondents indicated "Love Them"

- Over ¾ of respondents in China and South Africa responded with "Love them".

Percentages represent the percent of respondents who responded above or below the average emotional score by market.

GLOBAL VIEW: *EMOTIONAL DRIVER*

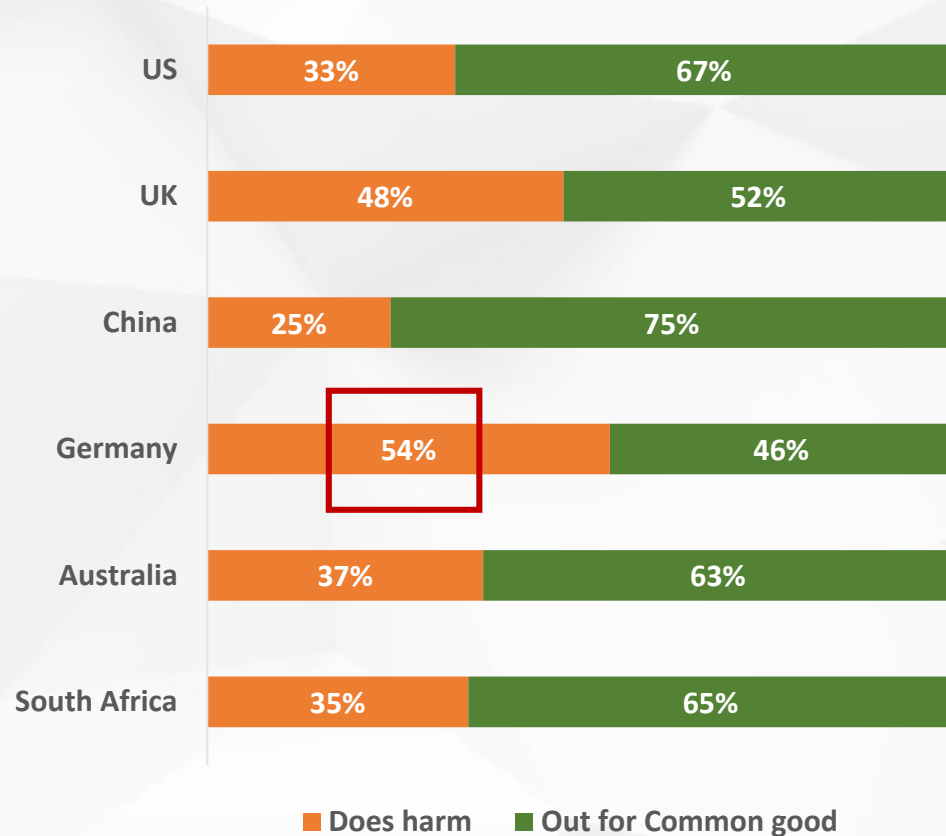| Market	It is the worst ever	It is amazing
US	27%	73%
UK	37%	63%
China	23%	77%
Germany	42%	58%
Australia	28%	72%
South Africa	21%	79%

■ It is the worst ever   ■ It is amazing

OVERALL IMPRESSION

What is your overall impression of Tech B2B companies?

- In all markets over 50% of respondents indicated that their overall impression of Tech B2B Companies is "Amazing". Most notable would be the 79% in South Africa.

Percentages represent the percent of respondents who responded above or below the average emotional score by market.

GLOBAL VIEW: *EMOTIONAL DRIVER*

Market	Does harm	Out for Common good
US	33%	67%
UK	48%	52%
China	25%	75%
Germany	54%	46%
Australia	37%	63%
South Africa	35%	65%

■ Does harm ■ Out for Common good

SOCIAL IMPACT

When thinking about Tech B2B companies, what is their overall impact on society?

- Germany was the only market to have over ½ the respondents indicate "Does harm" when asked about Tech B2B companies overall impact on society..
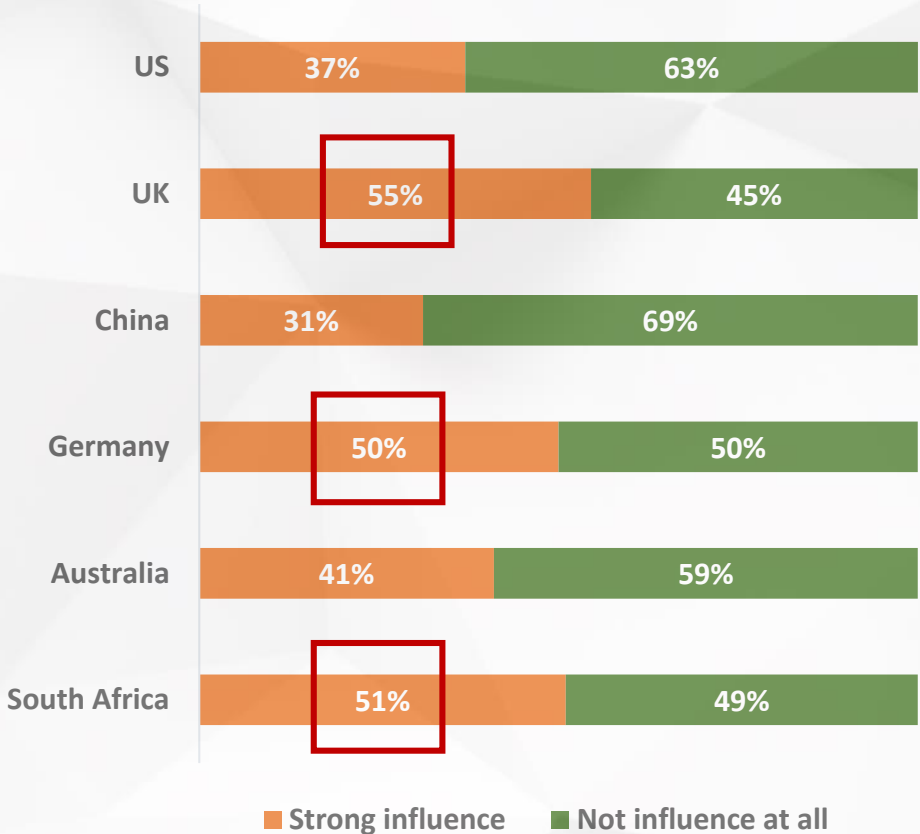
Percentages represent the percent of respondents who responded above or below the average emotional score by market.

BRANDS IN *MOTION*

Rational Drivers

GLOBAL VIEW: *RATIONAL DRIVER*

	Strong influence	Not influence at all
US	37%	63%
UK	55%	45%
China	31%	69%
Germany	50%	50%
Australia	41%	59%
South Africa	51%	49%

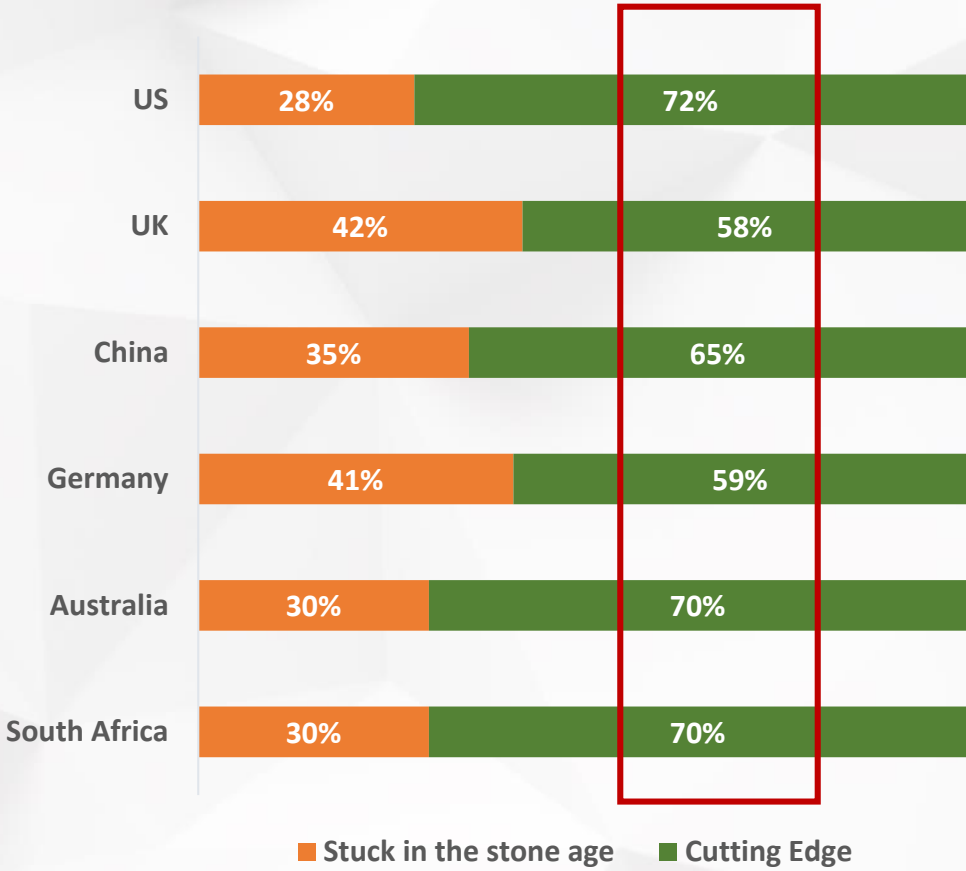■ Strong influence   ■ Not influence at all

EXECUTIVE BEHAVIOUR

Would the behaviours of the executive leaders of a company in the Tech B2B industry influence your decision to support the brand or not?

- UK, South Africa, and Germany were the only markets in which over ½ the respondents indicated that the behaviours of the executive leaders strongly influenced their decision to support a brand or not.

Percentages represent the percent of respondents who responded above or below the average emotional score by market.

GLOBAL VIEW: *RATIONAL DRIVER*

	Stuck in the stone age	Cutting Edge
US	28%	72%
UK	42%	58%
China	35%	65%
Germany	41%	59%
Australia	30%	70%
South Africa	30%	70%

■ **Stuck in the stone age** ■ **Cutting Edge**
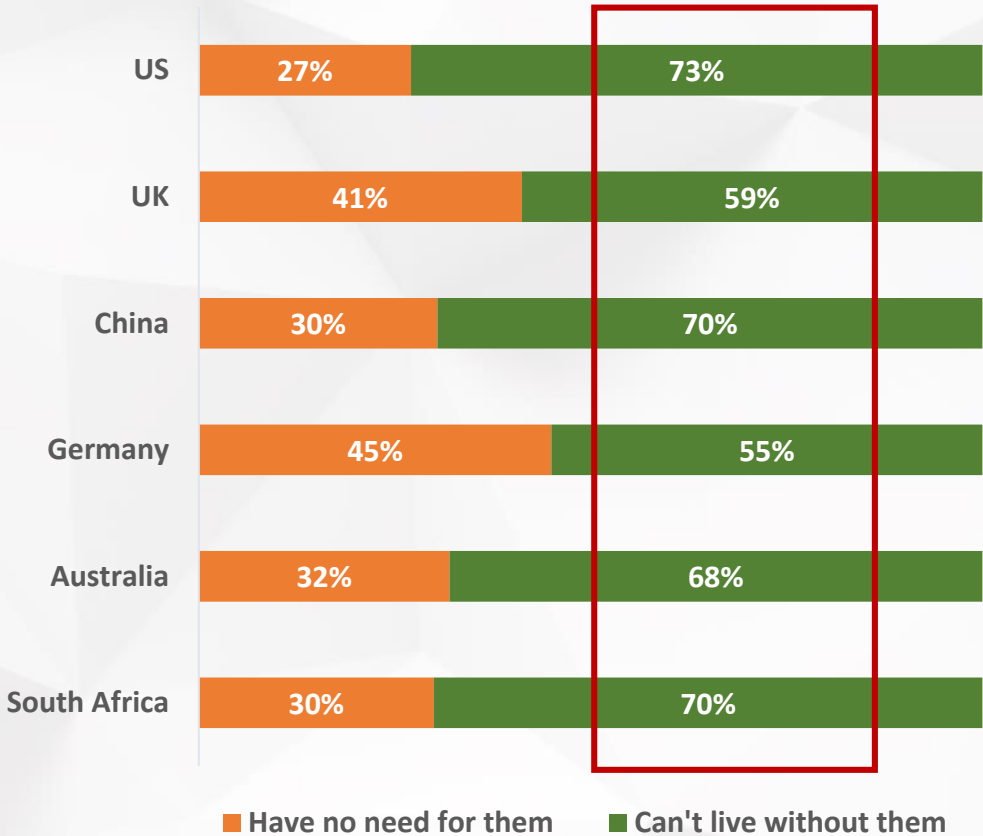
INNOVATION

How innovative are Tech B2B Companies?

- No surprises here. Across all markets surveyed, the majority of respondents indicated "Cutting Edge" when asked about how innovative are Tech B2B Companies.

- Germany and UK respondents did however have the lowest percentages at 59% and 58% respectively.

Percentages represent the percent of respondents who responded above or below the average emotional score by market.

GLOBAL VIEW: *RATIONAL DRIVER*

Market	Have no need for them	Can't live without them
US	27%	73%
UK	41%	59%
China	30%	70%
Germany	45%	55%
Australia	32%	68%
South Africa	30%	70%

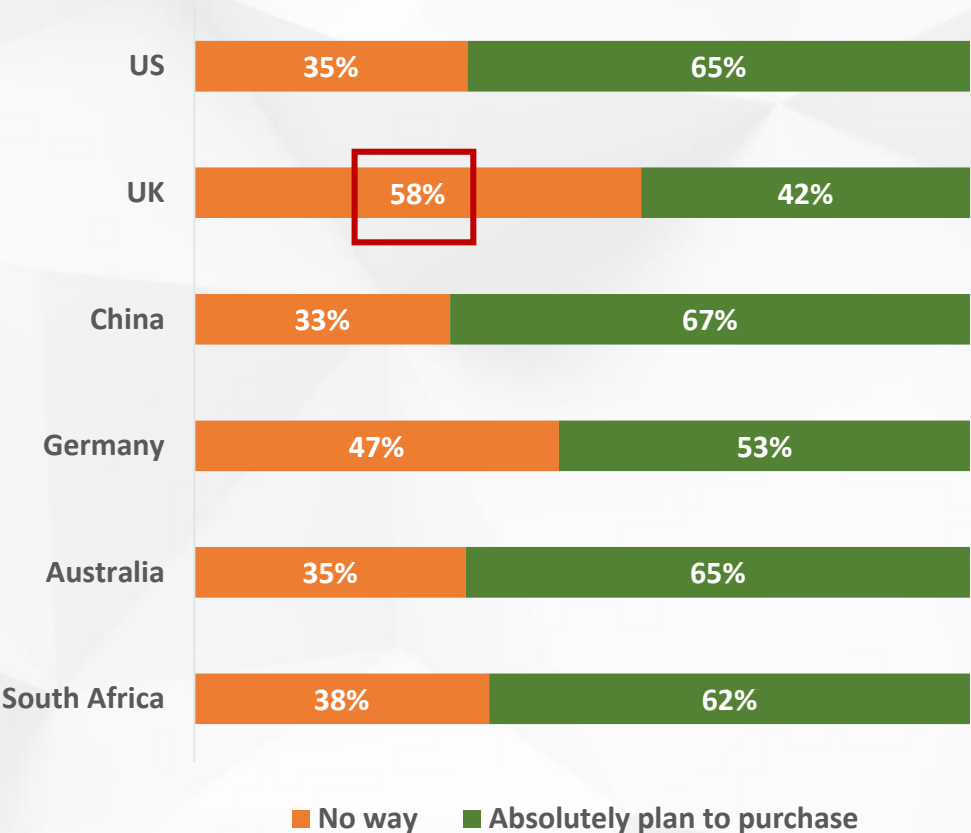■ Have no need for them ■ Can't live without them

NECESSARY

How necessary are Tech B2B Companies to your life?

- Majority of respondents in all markets indicated a high necessity for Tech B2B Companies.

- Respondents in the US had had the highest percentage of "Can't live without them" responses.

Percentages represent the percent of respondents who responded above or below the average emotional score by market.

GLOBAL VIEW: *RATIONAL DRIVER*

Country	No way	Absolutely plan to purchase
US	35%	65%
UK	58%	42%
China	33%	67%
Germany	47%	53%
Australia	35%	65%
South Africa	38%	62%

■ **No way** ■ **Absolutely plan to purchase**

INTENT TO PURCHASE

How likely are you to purchase products or services from Tech B2B companies in the next year?

- Nearly 6 out of 10 UK respondents indicated "No Way" when asked how likely they are to purchase a product or service from Tech B2B companies in the next year.

Percentages represent the percent of respondents who responded above or below the average emotional score by market.