

B2B Manufacturing Buyer Journey Study

Insights for Marketers in an Evolving Landscape

Findings based on more than 250 manufacturing executives and managers involved in making decisions on offerings with long sales cycles.

In collaboration with:



Contents

3 Executive Summary

4 Key Action Steps

5 Insight

5 Operational Urgency: The Real Buy Button

6 Off-Radar Research

7 Trust Trumps Tech

8 Known Before the Knock

9 Impartiality Is Imperative

10 Expertise Outweighs Accolades

11 References, Not Sponsorships

12 C-Suite Sweet Spot

13 Benefits Beyond the Buy

14 Cautious About the Chat

15 A Deficit in Depth & Distinction

16 Conclusion

17 About RH Blake



Executive Summary

The landscape for complex, high-value B2B manufacturing purchases is undergoing a rapid transformation. Buying decisions now involve more stakeholders, often spanning multiple departments and organizational levels. At the same time, the buyer's journey is becoming more fragmented, with AI-powered tools reshaping how buyers access information while traditional channels continue to play a critical role. All of this is happening under tighter budget constraints, with marketing teams expected to deliver greater impact using fewer resources.

As a result, **forward-thinking manufacturing marketers are reimagining their strategies to stay competitive and drive results in this new environment.**

64% of buyers actively seek independent, objective information

Key findings & insights

- **Buyers self-educate incognito:** Buyers are increasingly self-educating across numerous channels, often preferring initial anonymity. **Your website is the #1 research destination for 85% of respondents**, with search engines often being the very first contact point.
- **Technical expertise trumps brand:** When assessing vendors, demonstrable technical and industry-specific expertise (e.g., in application areas) is prioritized over general brand recognition, awards, or sponsorships. Notably, 33% felt vendors often lack sufficient technical depth and clear product differentiation.
- **Trust through human & independent sources:** Trust is paramount, often built via people-to-people interactions (e.g., technical trade publications, trade shows, peer recommendations, sales engineers). A significant 64% of buyers actively seek independent, objective information.
- **C-Level influence & core concerns:** C-level executives heavily influence final decisions. Their top concerns are reliability, total cost of ownership, and comprehensive support, often outweighing brand reputation.
- **AI's nascent role:** While generative AI tools are emerging, trust in AI-generated information is low.

Key Action Steps

To succeed, marketers must:

- ✓ **Optimize their digital presence** for self-educating buyers
- ✓ **Prioritize content and sales enablement** that showcase deep technical and industry expertise
- ✓ **Clearly articulate product differentiation**
- ✓ **Foster trust** by investing in channels that facilitate human connection and independent validation
- ✓ **Develop strategic messaging addressing C-level executive concerns**, such as reliability and total cost of ownership
- ✓ **Monitor AI's growth**, but keep focus on established, trusted channels

INSIGHT

Operational Urgency: The Real Buy Button

Critical operational needs, such as asset aging and technology obsolescence, are the primary drivers for initiating major purchasing processes in manufacturing, often overshadowing considerations like cost savings or labor shortages.

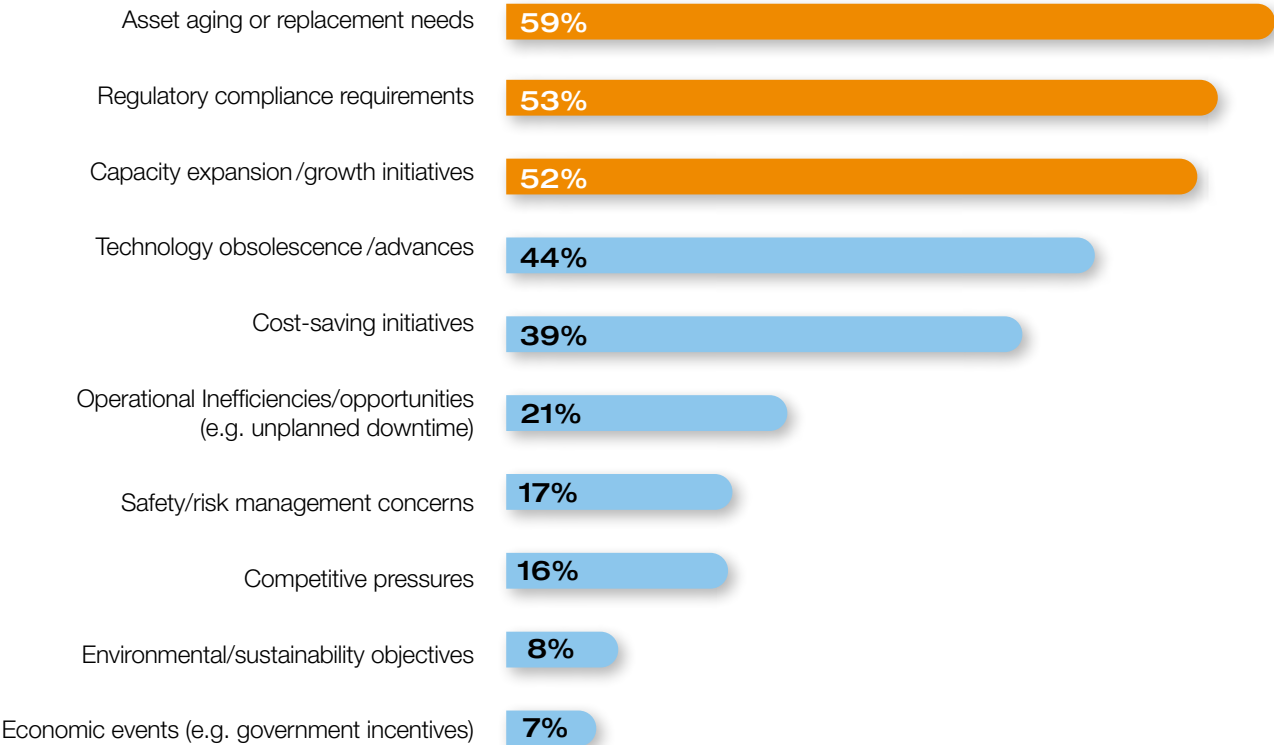
When buyers consider a significant purchase, **asset aging, technology obsolescence, and capacity needs are the most frequent triggers**. These factors represent immediate, compelling operational challenges that drive buyers to explore solutions. Notably, “cost savings” and “labor shortage,” while important business concerns, rank lower as initial catalysts for these high-value purchases. This suggests that, for the long-sales-cycle offerings typical in B2B manufacturing, foundational infrastructure and operational efficiency issues are the first points of pain that motivate action. This understanding is crucial for marketers aiming to gain “more confidence and more clarity” in structuring their marketing programs.

Pave the Path to Purchase

Lead with problem-centric messaging: Focus your early-stage content and conversations on how your solutions directly alleviate pain points related to aging assets, outdated technology or insufficient capacity. These are the “compelling events” that start the buying journey.

Differentiate between triggers and benefits: While your product may offer significant cost savings or labor efficiencies, understand that these might be secondary benefits rather than the initial reason a customer starts looking for a solution. Tailor your initial outreach and educational materials to resonate with the primary operational triggers that compel buyers to act.

QUESTION: What most often triggers the start of a significant purchasing process at your company? (Select all that apply)



INSIGHT

Off-Radar Research

Buyers conduct a significant portion of their research before engaging vendors directly.

Buyers of complex, high-value work purchases are well into their research process before initiating direct contact with a supplier. Only a small percentage (19%) reach out during the initial 10% of their buying journey. **76% of buyers initiate direct contact with a vendor before they reach the halfway point of their purchase journey**, and 12% complete over 75% of their research online. This highlights a long period of self-education where vendors are not directly involved.

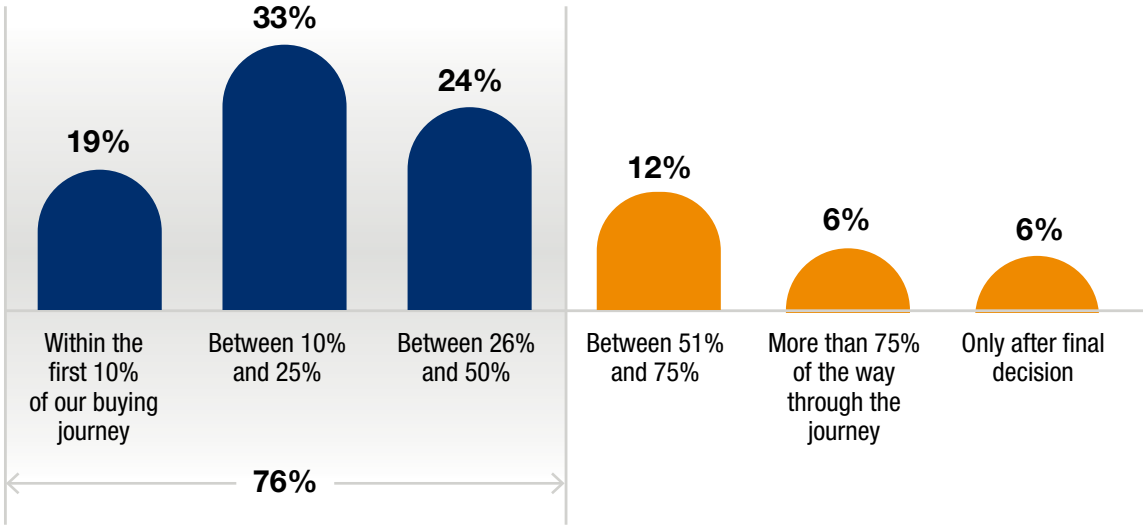
Pave the Path to Purchase

Optimize your digital storefronts for self-service: Since vendor websites are the primary research tool, ensure your site provides comprehensive, in-depth technical information, case studies, product comparisons, and pricing structures that empower buyers to advance through a significant portion of their journey independently.

Anticipate pre-contact questions and hesitations: Develop content that addresses common questions and concerns buyers have during their early research phase, even before they are ready to talk to a salesperson. This includes detailed specifications, white papers, explainer videos, and interactive tools that enable buyers to make a more informed decision.

Bridge the digital-to-direct gap: Design clear, low-commitment calls to action on your website that encourage buyers to gradually engage as they progress, such as downloading gated content, requesting a demo, or connecting with a technical expert, rather than immediately pushing for a sales call.

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



INSIGHT

Trust Trumps Tech

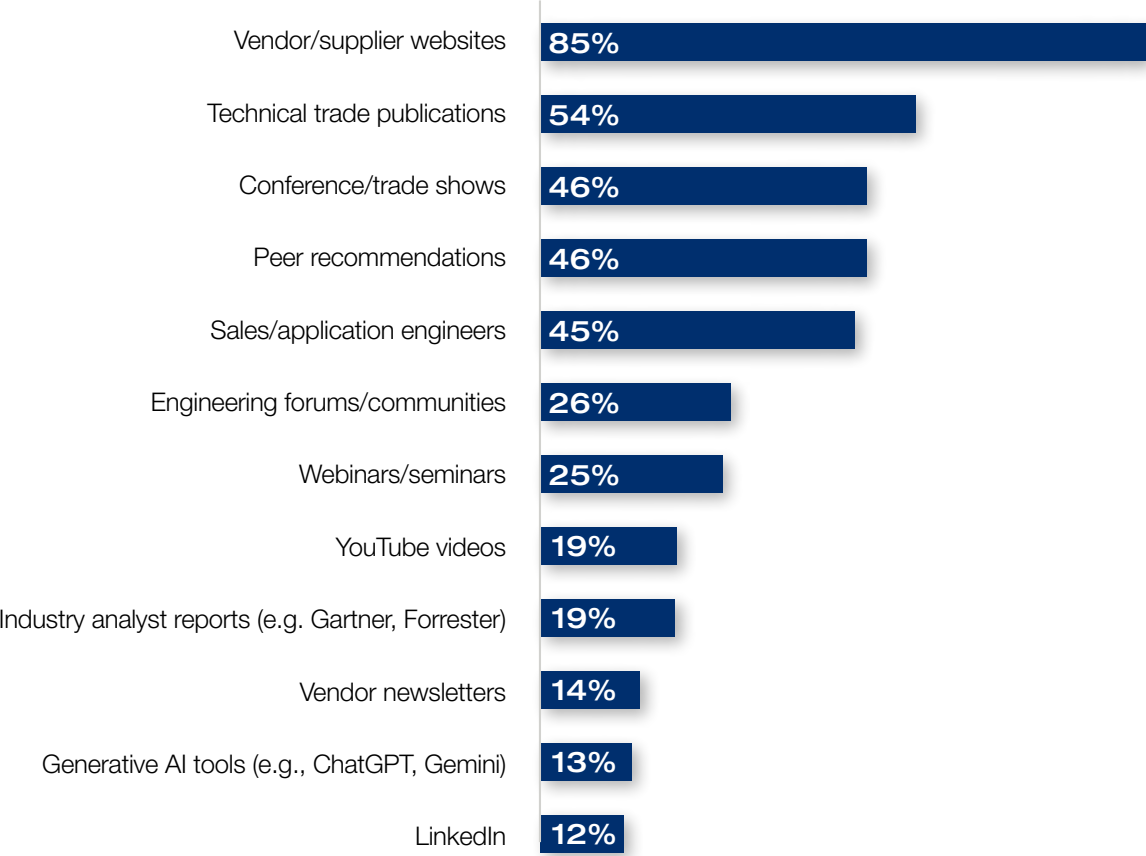
Established channels and human connections remain crucial for research, while newer tools are less relied upon.

When researching complex, high-value work purchases, buyers predominantly turn to vendor/supplier websites (85%), followed by technical trade publications and trade shows. While digital self-service is common, a strong emphasis remains on trusted, person-to-person interactions. **Peer recommendations (45%)** and **sales/application engineers (44%)** are highly valued information sources, along with conferences, trade shows, and engineering forums, all indicating the importance of human connection and trust. Notably, social media platforms like LinkedIn (11%) and generative AI tools (12%) are currently less relied upon for these critical research needs.

Pave the Path to Purchase

- Fortify your foundational digital assets:** Ensure your company's website is a robust, comprehensive resource, packed with detailed technical specifications, case studies, and application-specific content, as it serves as a primary "incognito" research hub for buyers.
- Cultivate human-centric content and engagement:** Invest in content that showcases deep technical expertise and facilitates peer-to-peer interaction, whether through thought leadership in trade publications, participation in industry events, or highly knowledgeable sales and application engineers.
- Strategically integrate emerging technologies:** While new tools like AI should be monitored, avoid over-investing in them at the expense of proven channels. Focus on how AI can complement, rather than replace, established trust-building efforts, perhaps by enhancing the accessibility or personalization of trusted content.

QUESTION: Where do you go for information when researching complex, high-value work purchases? (Select all that apply)



INSIGHT

Known Before the Knock

Digital presence and prior awareness are key for initial buyer engagement.

When buyers first recognize a need to research complex, high-value work purchases, the very first sources they typically use are search engines and vendor websites. For a vendor’s website to be the first point of contact, buyers must already be aware of the vendor as a potential solution provider. This indicates that initial brand visibility and strong search engine optimization (SEO) are critical for entering the buyer’s consideration set.

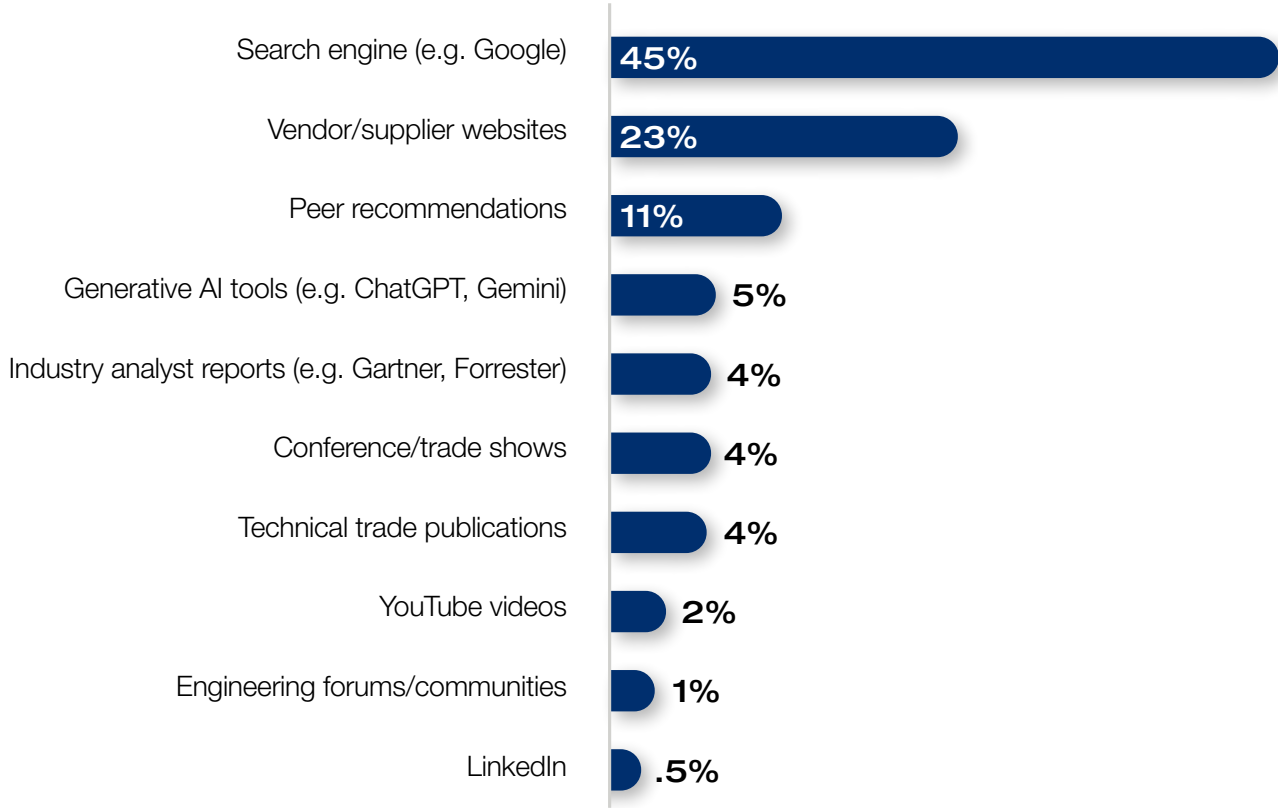
Although only 11% initially turn to peer recommendations, **they are relied on 45% of the time for these decisions.** Few turn to LinkedIn as the initial place to start research. Twenty-three percent turn immediately to a vendor website they are familiar with. Thus, if you’re not in the initial consideration set, you miss this opportunity.

Pave the Path to Purchase

Cultivate brand awareness to be “on the radar”: Implement strategies to build broad brand recognition and thought leadership, even before buyers have an immediate need. This ensures that when they do begin their research, your website is a known and trusted destination for their initial inquiries, especially when they start with search engines.

Anticipate pre-contact questions with rich content: Develop a robust content strategy that addresses the common questions and concerns buyers have during their early, unassisted research phase. This includes detailed product comparisons and interactive tools that allow buyers to “kick the tires” virtually without direct sales engagement.

QUESTION: When you first recognize the need to research complex, high-value work purchases, what’s the very first source you typically use to find a potential solution? (Select one)



INSIGHT

Impartiality is Imperative

Buyers actively seek independent and objective information.

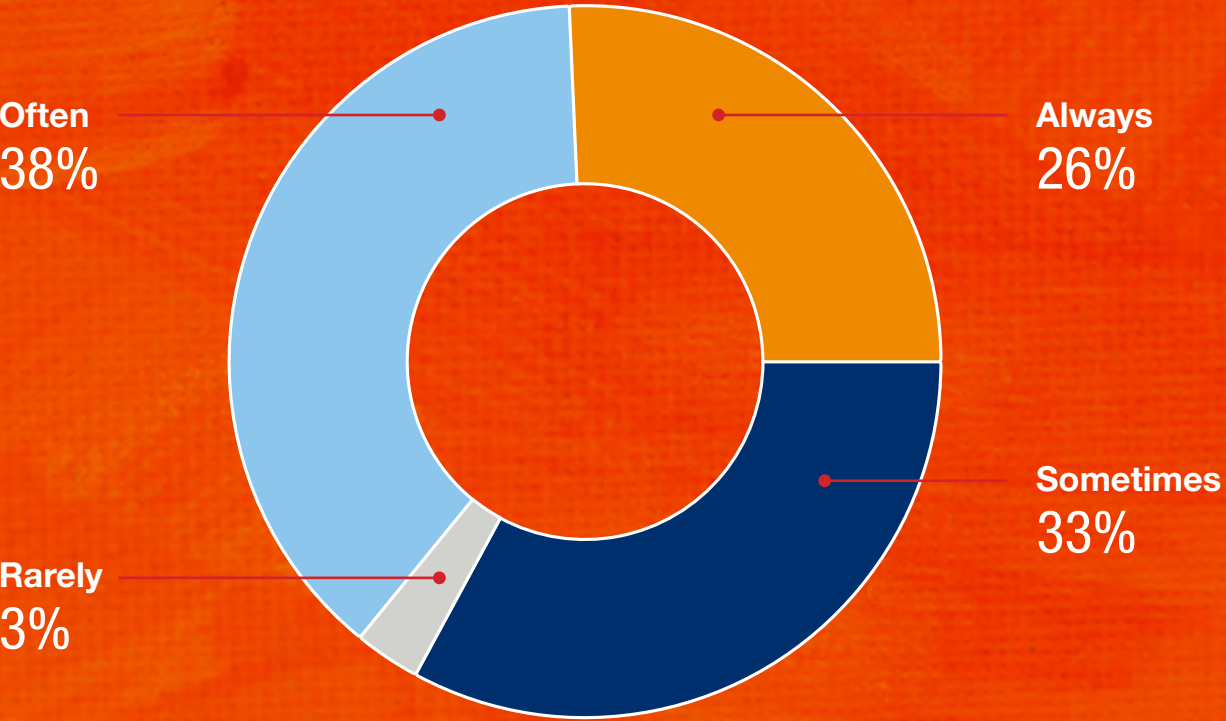
A significant majority of buyers (64%) regularly seek independent, objective sources of information that are not sponsored by a vendor or distributor when researching potential solutions. This highlights a strong desire for unbiased information and a natural inclination to verify vendor claims through neutral channels.

Pave the Path to Purchase

Beyond promoting your own content, engage with and contribute to independent industry platforms: This could involve publishing articles in reputable trade publications, participating in industry research studies, or ensuring your experts are quoted in independent news sources. Collaborating with trusted third parties can significantly boost credibility and demonstrate objectivity to discerning buyers.

Be a source of unbiased truth: Invest in creating or facilitating access to objective, comprehensive technical information, case studies and comparative analyses. Consider partnering with industry experts or independent review sites to validate your offerings.

QUESTION: How often do you purposely seek independent sources, not sponsored by a vendor or distributor, when researching for a work-related purchase?



INSIGHT

Expertise Outweighs Certifications

Buyers are scrutinizing vendors for application-specific expertise more than anything else.

We asked buyers to rate the importance of various factors in assessing a vendor’s technical credibility, on a scale of 1 (not important) to 5 (extremely important). The results show a clear prioritization of specific, demonstrable expertise.

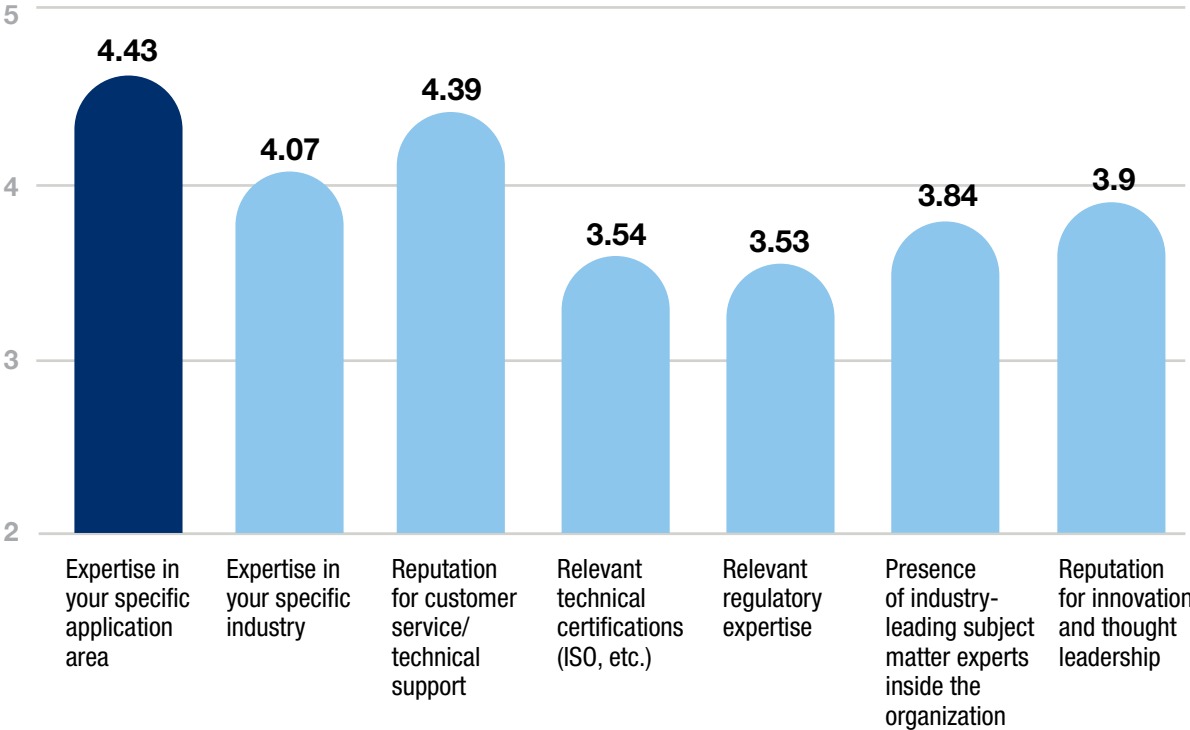
Buyers place significantly more importance on a **vendor’s demonstrable expertise in specific application areas** than on relevant regulatory expertise. Buyers also care more about a vendor’s reputation for delivering excellent customer service and technical support than on the vendor’s reputation for thought leadership or technical certifications.

Pave the Path to Purchase

Prioritize deep expertise in content: Focus on developing and showcasing content that highlights your deep, specific expertise in your target customers’ applications and industries. This includes detailed technical whitepapers, in-depth case studies with proven results for new technologies or techniques, and technical specifications.

Empower your sales and application engineers: Ensure your sales and application engineering teams are highly knowledgeable about customer-specific business scopes, applications, and can engage in consultative discussions that address nuanced technical questions. Their ability to understand and speak to the buyer’s unique challenges directly contributes to technical credibility.

QUESTION: When researching potential suppliers / vendors, how important are each of the following factors in assessing their technical credibility?
(On a scale of 1 to 5, 5 being most important)



INSIGHT

References, Not Sponsorships

Client experience and digital presence drive trust.

Direct **validation from past customers** and a **robust digital footprint** are the most potent indicators of trustworthiness. While marketing efforts and industry accolades have some value, they are secondary to tangible proof of performance and accessible, professional communication. This highlights the immense power of word-of-mouth and proven success.

This signifies that, **in today’s digital age, a vendor’s online presence is not just a brochure, but a critical tool for establishing legitimacy and providing essential information.** These top two factors underscore that clients prioritize tangible evidence of good work and ease of information access.

Further down the list, “Case studies with well-known brands” (3.72), “Active thought leadership presence” (3.6) and “Affiliation with industry experts” (3.57) contribute to credibility but are not as impactful as direct references or a strong website.

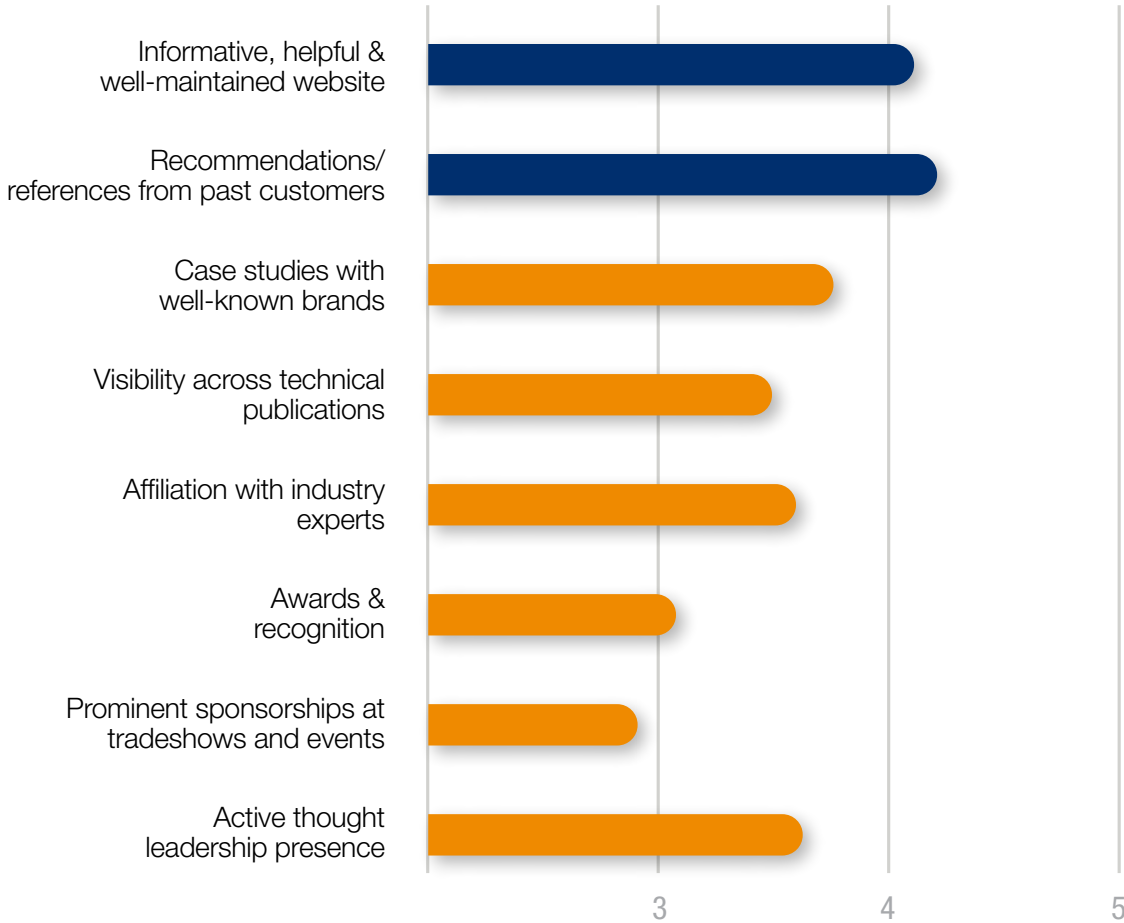
Pave the Path to Purchase

Prioritize customer satisfaction and solicit references: Actively work to ensure client success and satisfaction, then systematically request and leverage recommendations and references from past customers. These are invaluable assets for building trust.

Invest in a high-quality digital presence: Ensure your website is not only visually appealing but also informative, helpful and consistently well-maintained. It should be a go-to resource for potential clients seeking information about your capabilities and solutions.

Develop compelling case studies: While not as strong as direct references, well-crafted case studies, particularly those featuring recognized brands, can significantly bolster credibility by demonstrating proven results.

QUESTION: On a scale of 1 to 5, where 5 is a strong indicator of credibility, to what extent do the following factors indicate a credible supplier/vendor?



INSIGHT

C-Suite Sweet Spot

C-level executives hold significant influence over complex purchase decisions, requiring tailored marketing engagement.

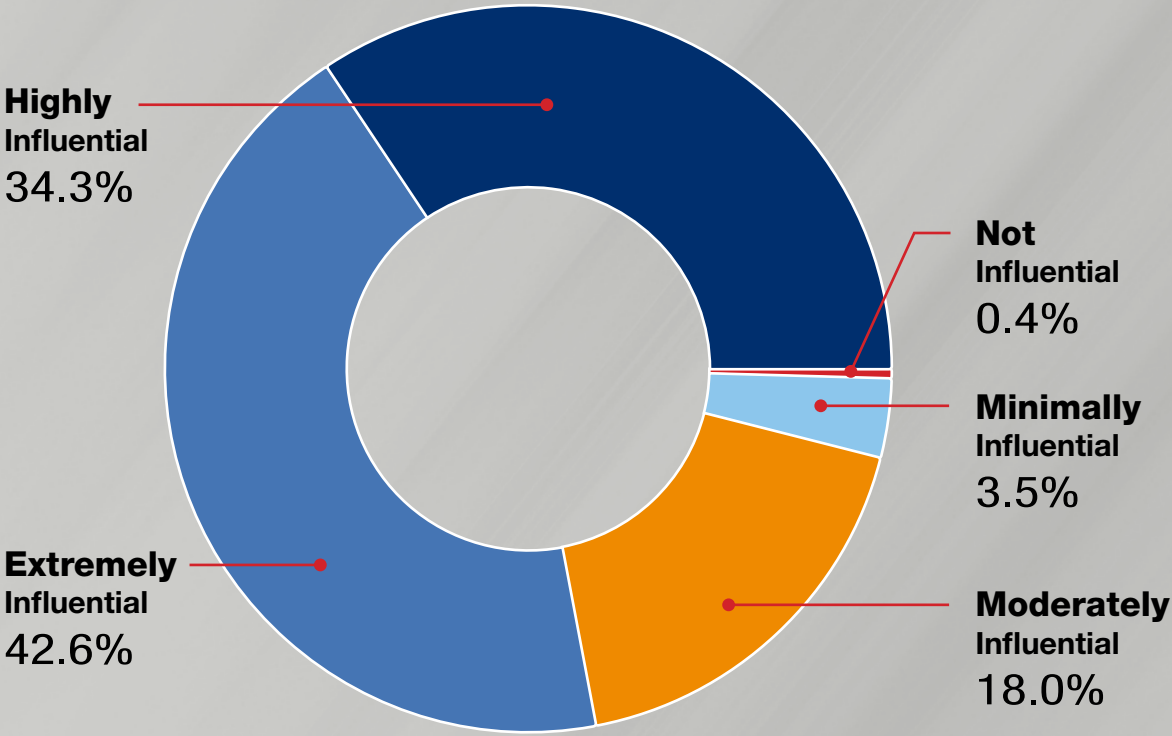
While marketers often focus on direct buying audiences, such as engineers and VPs of plant operations, C-level executives have a significant or major influence on the final purchasing decision for complex solutions. **Seventy-eight percent of buyers feel the C-level is highly or extremely influential in decisions.**

This underscores the importance of not overlooking this critical audience segment, even if they are not directly involved in the day-to-day operation or implementation of a product. Marketers must create both technical and C-level content.

Pave the Path to Purchase

Develop marketing content and sales enablement materials that speak to the strategic concerns of C-level executives: While engineers might focus on technical specifications, C-level individuals care about return on investment, operational efficiency, risk mitigation, competitive advantage and long-term business goals. Ensure your messaging effectively communicates the high-level business impact and value proposition of your offerings to this influential audience.

QUESTION: In your organization’s typical buying process for complex solutions, how would you characterize the level of influence C-level executives (e.g., CEO, CFO, CIO) have on the final purchasing decision?



INSIGHT

Benefits Beyond the Buy

Buyers prioritize long-term value and support.

When evaluating vendors for large purchases, **buyers' top concerns are reliability, total cost of ownership and support.** This demonstrates that buyers are looking beyond the initial product or solution to its long-term performance, maintenance and the relationship with the vendor.

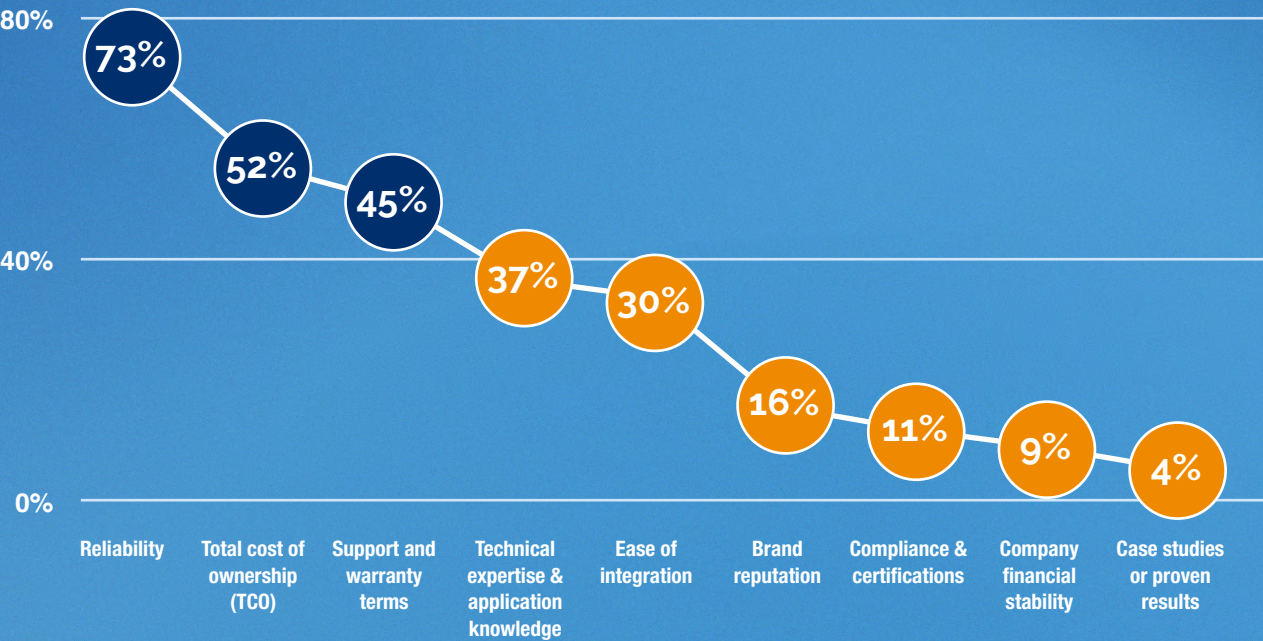
Interestingly, brand reputation is not a top concern, suggesting that it holds less weight compared to tangible factors like product performance and post-purchase service. This is a threat for companies that rely on legacy brands, but an opportunity for others to get their foot in the door.

Total Cost of Ownership is also not a top concern. Again, this opens the door for marketers to demonstrate benefits.

Pave the Path to Purchase

Emphasize reliability, lifecycle costs and robust support in your marketing communications: Showcase comprehensive service plans, warranties, and customer success stories that highlight post-purchase satisfaction and low total cost of ownership. For companies with established brands, avoid resting on laurels; for newer entrants, this presents a significant opportunity to compete effectively by demonstrating superior reliability and support, even if your brand is not yet widely recognized.

QUESTION: What are your top concerns when evaluating vendors for large purchases? (Select up to three)



INSIGHT

Cautious About the Chat

AI-generated content is a growing but cautiously trusted resource.

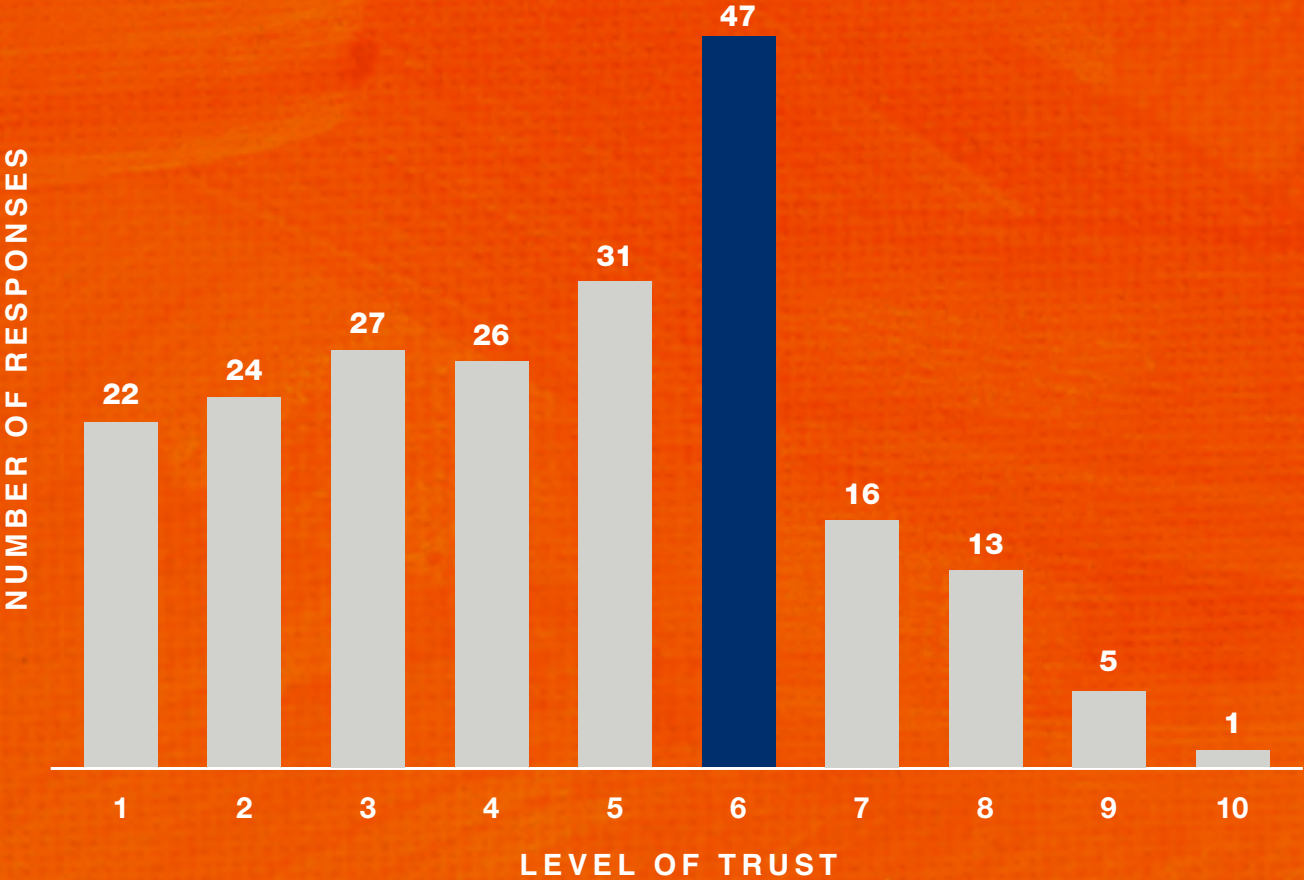
While generative AI tools are a recent development, the survey reveals that **buyers currently place only moderate trust in AI-generated information** for major buying decisions, with an average trust level of 4.5 out of 10. Only a small percentage (8.9%) of responses indicate a high trust level (8 or above) in AI. This suggests that **while AI is emerging, it is not yet a primary or fully trusted source for critical purchase research.**

Pave the Path to Purchase

Approach the use of AI in your marketing with a clear understanding of current buyer skepticism: While AI can be a tool for content creation, do not rely on it as a sole information source for your buyers. Continue to prioritize human-verified, expert-driven content. If integrating AI-powered tools or content, ensure transparency and clearly cite human-vetted sources to build greater trust. This number is likely to grow, but for now, traditional methods remain paramount.

Monitor and adapt for future growth: While not a primary focus today, the growing adoption of AI tools suggests their increasing importance over time. Marketers should monitor the evolution of AI's trustworthiness and usage trends to adapt their content strategies proactively. This means staying informed on how Large Language Models improve and how consumers become more comfortable using them.

QUESTION: How much trust do you place in AI-generated information for major buying decisions? (Scale: 1 = No trust, 10 = Full trust)



INSIGHT

A Deficit in Depth & Distinction

Vendors frequently overlook providing sufficient technical depth and clear product differentiation.

When asked what vendors often overlook during purchase research, **one-third of open-ended responses highlighted a lack of technical expertise and insufficient product differentiation.** This indicates a critical gap: **buyers feel that vendors either do not provide enough specific technical details or fail to clearly articulate what makes their offering uniquely superior to competitors'.** This can manifest as sales personnel lacking a deep understanding of the buyer's business and application, or marketing failing to clearly communicate unique product advantages.

Pave the Path to Purchase

Invest in robust sales enablement and training programs: Ensure that your sales teams possess the deep technical expertise and industry knowledge necessary to engage consultatively with buyers.

Differentiate your offering: Define your marketing messaging to distinctly articulate your product's unique value proposition and differentiation points. Move beyond generic features to highlight specific benefits and competitive advantages that directly address buyer needs.



What makes your offering **uniquely superior** to your competitors'?

Conclusion

The B2B manufacturing buying journey is undeniably complex, characterized by extensive self-education, a multi-stakeholder decision-making unit, and a blend of digital and traditional information sources. For marketers, success lies in adapting to these dynamics by:

- **Becoming a trusted resource:** Provide comprehensive, accessible, and objective information early and throughout the buyer's self-education journey, especially through your website and independent channels.
- **Demonstrating deep expertise:** Prioritize showcasing your technical and industry-specific knowledge, focusing on reliability, total cost of ownership, and comprehensive support.
- **Engaging the full buying committee:** Remember to tailor messaging for all influencers, including C-level executives, addressing their strategic concerns.
- **Balancing innovation with proven methods:** While emerging technologies like AI are on the rise, traditional, human-centric channels continue to be highly valued for their trust and depth.

Just as a master chef doesn't rely solely on one ingredient, but meticulously balances flavors to create a gourmet dish, successful **manufacturing marketers must blend diverse strategies**—from digital content and SEO to expert engagement and tailored executive messaging—to truly satisfy the complex appetite of today's B2B buyer.



About RH Blake

The complex, high-value B2B manufacturing purchase journey is undergoing rapid transformation, presenting both challenges and opportunities for marketers. RH Blake is dedicated to equipping B2B manufacturing marketers with the clarity and confidence needed to succeed in this evolving landscape.

We address the reality that **buyers are self-educating more than ever before** and often prefer to remain incognito during initial research, ensuring your website is optimized as a primary destination. RH Blake helps you showcase your deep expertise in specific application areas and industries, building technical credibility that buyers value. We also assist in developing

sales enablement strategies to ensure your teams provide the deep, consultative engagement buyers expect.

Recognizing that trust is paramount and often built through people-to-people interactions, **we guide you in leveraging channels like technical trade publications, trade shows, peer recommendations and direct engagement with sales and application engineers.**

Furthermore, we help **craft strategic messages for all decision-makers**, including C-level executives who heavily influence final purchasing decisions and prioritize factors like reliability and total cost of ownership over mere brand reputation.



For more than 30 years, RH Blake has helped leading organizations in the manufacturing ecosystem build and execute marketing programs that drive targeted awareness, preference, leads, and margin expansion.

About IEN

IEI (Industrial Equipment News), an Industrial Media brand, has been the leading resource for manufacturing industry professionals since 1933. As a legacy trade publication, IEN's print and digital content keeps industry professionals up-to-date on the constantly-evolving industrial environment. Other longstanding Industrial Media brands include Industrial Maintenance and Plant Operation (IMPO), Manufacturing.net, Manufacturing Business Technology, Food Manufacturing and Industrial Distribution.

For more information on advertising opportunities with IEN, please contact **Tom Lynch** at tom@ien.com.

How we help



1 Agency partner

For clients who can benefit from strategic insight and deep, comprehensive marketing.



2 Program solutions

Following an initial assessment, RH Blake develops customized programs based on client objectives and priorities.



3 Defined projects:

An excellent way for clients to see the measurable value of a leading industrial and manufacturing-specialized marketing agency.



Let's put our heads together



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