

Work in BETA: The Rising B2B Decision Makers

By Lucie Greene
and Jason Mander

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Foreword

Work in BETA: The Rising B2B Decision Makers

2020 is a year of inflection; the pandemic, social justice, remote working and the influence of technology on work and society have created challenges and opportunities politically, economically, socially, commercially and professionally.

To paraphrase Darwin, those who prosper and survive will be ‘those who can best manage change.’

The current millennium has seen the acceleration of change driven by ubiquitous bandwidth and new devices and platforms that catalyzed consumer-led change in categories as diverse as grocery, media, retail, travel and financial services. Consumers send signals through their digital interactions and business responses; products and services iterate in areas as diverse as design, product and distribution.

What’s true in consumer marketing is true in Business to Business marketing. With our partners GWI and forecaster Lucie Greene, we undertook a landmark study of the changing behaviors and attitudes of 17,000 knowledge workers in ten markets focusing specifically on those aged 21 to 40. These are the professional cohort who will influence the structure and behavior of enterprises most in a world altered by the Covid-19 pandemic, and they represent an evolving notion of what professional identity means in this new environment.

The study is a scaled global snapshot of business at a time of dislocation, when speculation about a new normal is just that – speculation. There are some certainties confirmed by the data: the acceleration of pre-existing trends caused by technological enablement, the embracing of technology to separate work from place of work, the dangers to society and business of social inequity and income inequality, and the paradox of circumstances that have physically separated us but illuminated common challenges.

We have named this group the BETAs: the line between their life and work is Blurred; they have Evolved to believe formal structures will be supplanted by development opportunities for the individual; their dexterity with Technology will give them an advantage as work styles evolve; and they will take their Activism to work and use it as a filter to judge employers, colleagues, customers and suppliers.

The BETAs are the first cohort of digital natives to assume positions of seniority in business. It goes beyond the smartphone; they are the generation who have always used cloud-based services and collaboration tools. They don’t have professional experience that pre-dates search, e-commerce and liquidity tools like LinkedIn where they make their skills and experience visible to those who might value it most. Management of professional identity is also important to this group – a job is not for life, and their personal brand is key in the pursuit of professional mobility. They live and work at the intersection of insecurity and opportunity, often beyond city or geographical borders. Whether through choice or necessity many recognize that their next employer may be themselves, as barriers to entry into entrepreneurship like geography or infrastructure recede.

BETAs are everywhere. We see them strongly in the US and UK. The values we observed are most prominent in countries with young populations, young companies, and dynamic economic structures. Brazil and India are outstanding examples, as is Japan at the opposite end of the spectrum where economic, social and commercial structures are more traditional in comparison.

This research is intended to identify and quantify behaviors to help business, government and the BETAs themselves understand the trajectory of change and what is required of companies and leaders in sales, marketing and other functions. The BETAs are ready for the world; the world needs to be ready for the BETAs.

Continuous disruption will characterize our future. Consequently, business planning must become dynamic. We must accept and embrace fluid and inclusive policies and processes that reward ambition and minimize fear. Every day is the first draft of history, we hope this research contributes to that and to your plans for what's next.

Finally, a thank you GWI and to Jason Mander for leading their team, to Lucie Greene for her accompanying essay, to Rachel Abbe for her stellar effort throughout, to Rob Norman for his invaluable guidance, and to all individuals who contributed – from experts to respondents and to the LinkedIn Insights team.



DIRECTOR, B2B INSTITUTE

Ty Heath



HEAD OF EMEA, B2B INSTITUTE

Victoria Pattinson

About the Authors



Lucie Greene

Founder, Light Years

Lucie Greene is a forecaster, strategist and award-winning author specializing in cultural trends, consumer insight and brand innovation. Her New York-based futures practice Light Years works with numerous global lifestyle brands on strategy, research and innovation. She also advises venture capital and rising start-up companies. Most recently, Greene led J. Walter Thompson's global futures think tank JWT Intelligence, steering original research into emerging consumer behaviors, cultural shifts and lifestyle trends with JWT Intelligence leading units around the world, while also consulting JWT's many Fortune 500 clients. In August 2018, Greene released her debut book with Counterpoint entitled, *Silicon States: The Power and Politics of Big Tech and What it Means for Our Future*. The book was awarded 800-CEO-READ Business Book Award in Current Events and Public Affairs in 2018. She has been featured as an expert on trends and consumer insights on the BBC, Fox News, CBS, CNBC and Bloomberg TV as well as contributing pieces to Campaign, The Guardian, The New York Daily News, Sunday Times Style UK and The Financial Times. She has spoken at several international conferences, including CES, WWD Summit, Web Summit, SXSW, and Cosmoprof, and she is on the board of Cosmetic Executive Women USA.



Jason Mander

Chief Research Officer, GWI

B2B Institute Research Fellow Jason Mander leads the research and insight departments at research firm GWI, where he oversees the company's flagship continuous study on the digital lives and lifestyles of consumers across 46 countries. He is an expert on the attitudes and behaviours of business professionals around the world through his work, including GWI Work, a deep dive into B2B professionals, which is the official data source for "Work in BETA: The Rising B2B Decision Makers." He also launched GWI USA, which examines contemporary attitudes, behaviors, and sentiment among American consumers.

Jason regularly writes about trends across a vast range of audiences, markets and sectors at conferences and in the media (WARC, BBC News, Bloomberg, CNN and others)

Earlier in his career, Jason was Head of Insight at Future Foundation, where he launched the company's U.S. service, managed its Quant, Intelligence and Forecasting departments, and served as an Account Director for a number of global brands.

Jason first began working with trends as a Research Fellow at the University of Oxford. Building on a PhD in the Social Sciences, he published a book through Cambridge University Press, authored a number of articles and visited more than 100 cities for the purposes of his research.

“Permanent beta is essentially a lifelong commitment to continuous personal growth. Get busy livin’, or get busy dyin’.”



Reid Hoffman, *The Start-Up of You: Adapt to the Future, Invest in Yourself, and Transform Your Career*

Introducing the BETAs

By: Lucie Greene

Introduction

Barely a day has gone by in the past decade without a marketing presentation exploring the wants, needs, qualms and behaviors of millennials (more recently expanding to the TikTok-loving Generation Zs.) Strategies have been forged trying to sell sneakers, soft drinks, music, beauty and more to this group, who have come to represent “youth,” relevance, and disposable income for brands. Their behaviors infiltrated culture at large — consumers of all ages now pay \$37 for spin classes, book a taxi on an app three minutes in advance, buy clean beauty products, and stream music (rather than own it) in part because this group did. Millennials transcended the notion of pure generation to become a consumer psychographic and influencer of wider behaviors. They are the reason our grandparents and parents are on social media. Even in markets around the world where the term “millennial” varies subject to cultural and economic contexts and forces, universal factors such as social media and smartphone ubiquity impacted this age group in ways that will have ramifications for work and play for decades to come.

Until recently, the impact of this major cohort has rarely been assessed in the context of B2B. We believe this is an oversight that must be corrected. Millennials have officially grown up, and they are moving through the ranks and taking on leadership roles in the workplace. They are becoming key influencers in company purchase decisions, and they are approaching B2B purchasing in a new way. We call them The BETAs - a new group of younger B2B buyers.

Who are the BETAs?

The name BETA was inspired by the notion of literally being in “Beta,” a term synonymous with business in Silicon Valley, where disruption and entrepreneurship have become a religion. It echoes this group’s focus on self-improvement, iteration, and being in ‘constant Beta’. (It’s no wonder this cohort has also driven the global obsession with wellbeing and fitness, not to mention the cult of travel and experiences for professional and personal actualization.) BETAs came of age when entire sectors like banking and retail were upended within a few short years, and, for that reason, BETA culture has zeroed in on adaptability as a means of survival. The BETAs are the first “LinkedIn Generation” — they came of age professionally when LinkedIn was very much of the professional culture lexicon and a new concept entirely.

For this study we’ve segmented the cohort at 21 to 40 years old. We believe this group will exert significant change drivers in the B2B sector, just as this group influenced broader consumer trends, as work becomes ever more digital in the era of Covid-19. The BETAs represent a new broader psychographic in B2B marketing that will drive shifts across businesses and among buyers at large.

The BETAs are the first “LinkedIn Generation” — they came of age professionally when LinkedIn was very much of the professional culture lexicon and a new concept entirely.

The BETAs exhibit many of the same characteristics globally. However, as Jason Mander, Chief Research Officer and data lead on the BETA research explains: “it’s not the case that every single aspect of the BETA mindset finds representation in every single country; it’s important to recognize the impact of local cultural frameworks and customs.” That said, we see tremendous value in understanding a group of buyers as large as those aged 21-40 – especially since broad reach marketing with universally familiar creative is poised to build the strongest B2B brands in the 2020s.¹

As Peter Weinberg, Global Lead at the B2B Institute, explains in his Quantum Marketing essay, “In quantum marketing, you don’t reach exactly the right buyer. You reach anyone who could potentially buy, in either the short-term or in the long-term. You don’t design specific creative for specific buyers. You design creative that’s potentially relevant to a massive set of customers.”²

What is the BETA mindset? And what does it mean for B2B sales and marketing?

Technology, unsurprisingly, has had more influence than anything else on the BETA mindset. It fostered an open-mindedness when it comes to trying new tools and approaches. The on-demand, mobile-centric, and easy-to-use nature of consumer applications has radically shaped BETAs’ expectations in business, with high demands on time-management and productivity capabilities. If tech platforms don’t keep up, they are quickly abandoned. BETAs are being met with a wave of new digital products, brand concepts, AI-powered plug-ins and productivity tools that are more akin to the consumer user experience of Uber and Airbnb than traditional business services. Disruptive B2B brands like Stripe, Mailchimp, Basecamp, Shopify, and Slack have, as a result, started to replicate influential consumer brands with pithy language, convenience, attractive design, and UX befitting of popular lifestyle apps.

Business should anticipate there is more to come as BETAs take the stage as lead B2B stakeholders.

Our data shows BETAs are rising up the ranks professionally. If they are not the lead decision makers yet, their values, outlook and mindset nonetheless have growing influence in companies — especially as decision making becomes more decentralized. According to B2B International, millennials will make up 44% of the workforce by 2025.³ In our study we can see that 74% of BETAs are involved in making buying decisions for their companies. They’re already driving a digital approach to B2B selling – 51% (versus 33% of Other Professionals) perceive digital products to be more personalized vs. analog, for example. Business should anticipate there is more to come as BETAs take the stage as lead B2B stakeholders.

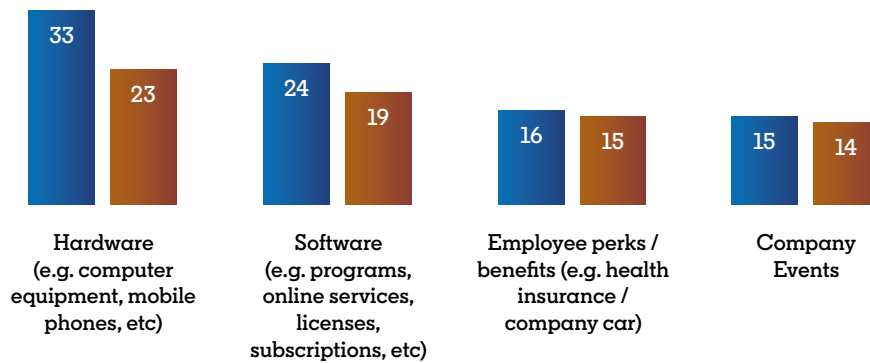
¹ <https://business.linkedin.com/marketing-solutions/b2b-institute/2030-b2b-trends>

² <https://business.linkedin.com/marketing-solutions/b2b-institute/b2b-research/trends/quantum-marketing>

³ <https://www.b2binternational.com/wp-content/uploads/2020/10/The-Future-Is-Now.pdf>

Ultimate Decision Makers

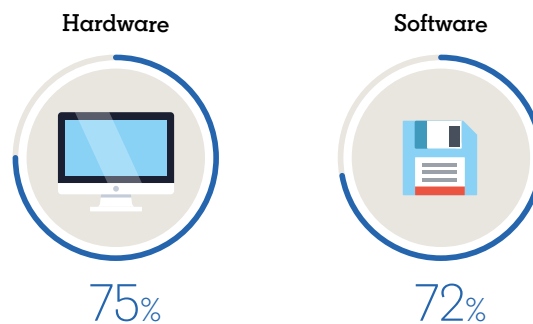
BETAs increasingly have ultimate decision making power



% of Business Professionals who say they are the ultimate decision-makers for their companies for the above purchase types

■ BETAs ■ Other Professionals

Globally, BETAs make up the majority of ultimate decision makers in hardware and software



% of all Ultimate Decision-Makers who are BETAs

Question: How much influence would you say you have when your company is purchasing the following products / services?

Source: GWI Work 2020

Base: 17,692 Business Professionals aged 21-64 in 10 countries

Published in "Work in BETA: The Rising B2B Decision Makers" by The B2B Institute, 2020

BETAs are influential in key company purchase decisions, particularly in hardware and software categories. Our global data shows that 75% of ultimate decision makers for hardware and 72% for software are now BETAs – though this varies by market. Our data also shows a dominant influence of BETAs on purchase journeys: 57% of our global BETAs say they are a key influence in identifying new business needs, and 47% say they are responsible for approving purchases. It's interesting to note that in this global study, attitudes exhibited by older BETAs – aged 31 to 40 – became more pronounced in the younger group aged 21 to 30, indicating that the influence of BETAs in B2B will strengthen as more enter the workforce.

Why now?

It's a fascinating moment – during this Pandemic — to explore the BETAs. The 2008 financial crisis wrought disruption and enormous challenges that defined the 2010s. New industries exploded, and entirely new ways of working and consuming became commonplace – from gig work, to on-demand services. Seismic verbal and visual technologies have become widely adopted: we ask the internet for information, speak our texts, and use our Face IDs to unlock personal banking. This same transformation can be expected as the Coronavirus pandemic shapes the 2020s – a decade that will be characterized by BETA buying power and leadership.

What will the coming decade have in store? Further challenges, and disruption, of course, but potentially new, exciting trends. And with this highly adaptable, passionate, and determined generation in the driving seat, there's lots to be excited about.

BETA Framework



Blurred Boundaries

Where older generations separated their work and home lives, this highly digital group increasingly lives in a constant state of continuum between professional and personal, in outlook and behavior. Sometimes to its detriment.



Evolving

To the BETAs, career increasingly is identity – they’ve been raised in an era where personal brands intersect with professions. They consider themselves to be trendsetters, and they are highly focused on self-improvement, staying abreast of innovation trends, generating their own content, and optimizing the workplace with new tools and better deals. The BETAs are adaptable and resilient: their early careers were shaped by the Global Financial Crisis of 2008, and their new chapter as prominent decision makers will now be shaped by the Coronavirus Pandemic. The BETAs are constantly evolving their personal brand and professional aspirations.



Tech Native

The BETAs’ careers began when digital work, social media, big data, disruptive business models, and smartphone culture were the norm. They were raised on apps, so they expect the same level of UX and ease of use in their professional solutions. They increasingly use smartphones for work-related tasks, and they want AI-powered tools to aid in finance, planning, logistics, workflow-tracking, and more. They expect personalization, convenience, flexibility, and digital-first professional interactions – preferably via less formal communication mediums, such as messaging, video, and social media.



Activist

Just as it’s now mandatory for consumer brands to have purpose and support inclusivity as table stakes, the BETAs demand the same in business. The BETAs are purpose-minded and concerned about the environment, inclusivity, and gender equality. They expect brands and employers to reflect their values, and they have even started to look to B2B vendors for the same pillars. This shift is likely to have been accelerated by Covid-19, and by the social justice reckoning sweeping the US and world, as brands face 360-degree accountability.

Looking Forward

Things to keep in mind as you read the report:

- **The BETAs matter because they are increasingly becoming the ultimate decision makers.**
The BETA movement represents millennials coming of age professionally. This group historically has driven wider change in consumer behaviors, and it is likely to have a similar impact in B2B.
- **The BETAs have been shaped by disruption and recession – evolution is core to who they are.**
For many professionals, the explosion of technology in the early 2000s was an inflection point in their careers. For the BETAs, it was the starting point. This starting point was simultaneously characterized by the Global Financial Crisis, and BETAs are now experiencing dominant decision-making power for the first time in the wake of the Coronavirus pandemic. The BETAs are always adapting and innovating, both by necessity and by ambition.
- **Technology will define this moment, and the BETAs are uniquely equipped to lead the way.**
The Coronavirus pandemic has accelerated the push to virtual work, highlighting huge gaps between current tech capabilities and buyers' need for interconnectivity and flexibility. This time of flux requires constant innovation and resilience. The BETAs are up to the task, on their terms – flexibility, ease of use, and social responsibility will be driving factors in their decisions.
- **The future is BETA.**
Not just in decision making power, but also in behavior. Beta attitudes and behaviors for work and purchase decisions are even more pronounced among younger Betas, suggesting their impact will be long lasting.

Work in BETA: Data Analysis

Jason Mander

The B²B Institute

B IN BETA

Blurred Boundaries

Blurred work-life boundaries define how the BETAs show up professionally.

Blurred Boundaries: Summary

- **The Pandemic's Impact on Remote Working.** Assessing year-on-year increases in remote working.
- **Loss of Dedicated Workspace.** The locations that people are working from remotely.
- **The Lengthening Workday.** The impact of working late, working overtime, and checking messages outside of scheduled work hours.
- **The “Always On” Smartphone.** Understanding the relationship between workers and their phones.
- **Blurring of Personal and Professional Usage.** Tracking the usage of devices and services for both personal and work-related reasons.
- **An Absence of Flexibility.** Looking at whether remote working has been accompanied by an increase in flexible working.
- **Towards a Remote Future.** Quantifying attitudes and expectations about future remote working practices.

The Pandemic's Impact on Remote Working

Back in 2019, just a quarter of business professionals said that remote working was broadly permitted by their company. A similar proportion reported that it wasn't allowed under any circumstances, with the remaining half stating that it was permissible in some situations only.

Naturally, the pre-pandemic picture varied between countries. 15% of professionals in France, Singapore and Japan said their company had fully embraced remote working. That rose to around a fifth in Germany and Spain, before hitting a quarter in Australia, the U.S. and UK. Age played a role too; BETAs are more likely to work at companies which supported remote working, in part because they tend to be employed by younger organizations.⁴

Nevertheless, the overall picture was clear: in 2019, most business professionals did not work at companies which fully supported remote working. From concerns over lower productivity to unease about the loss of sightlines in offices, it's a concept that was still met with unease by many employers - even against the backdrop of the devices, collaboration tools, and other connectivity options which workers now have at their disposal.

In 2020 this changed almost overnight. In country after country, office workers suddenly began working remotely en masse, regardless of their company's previous procedures and policies. This study's data confirms the dramatic nature of the change; compared to 2019, the number of BETAs who typically work at home during a typical week is up 46 percentage points. Two thirds of BETAs now say they do this, making the home the most common work location.

⁴ 4 in 10 BETAs work for companies which are under 10 years old, compared to fewer than 2 in 10 among business professionals aged 41-64.

Co-working spaces and shared offices are up by more than 10 points. Coffee shops have enjoyed a small increase too, as does just about every alternative there is to working in an office.

Of course, the hands of many businesses were forced by the pandemic; support for remote working was required, rather than volunteered. But now it's established as a mainstream, viable option, it's unlikely we'll see a quick or straight-forward reversion back to the previous norm. Remote working is here to stay.

Loss of Dedicated Workspace

It's hard to overestimate the impact of such a sudden jolt to business. Most companies did not have a chance to plan the transition carefully; and many business professionals lacked sufficient infrastructure or space to adapt to home working seamlessly, especially in younger groups. Like never before, work-life boundaries instantly became harder to distinguish and maintain.

Business professionals of all ages and in all countries felt the strengthening tension between home and work. But the impact on BETAs is most intense. Crucially, working from home is not a democratized experience; it does not take the same form for every worker, and an individual's domestic situation is key to this.

In 2020 many BETAs struggle with a physical location from which to work. They are the most likely to live in urban areas. Due to their life stage, they are most likely to be living in shared households or with their parents. They are most likely to report not working in a home office, despite working from home.

Crucially, working from home is not a democratized experience; it does not take the same form for every worker, and an individual's domestic situation is key to this.

1 in 5 are in this situation, compared to just over 1 in 10 among other business professionals. In France and Spain, a third or more BETAs are working from home, but not in a dedicated home office space.

We know from further GWI research among workers in the UK and U.S. that a home office is one of the integral drivers to people feeling satisfied with remote working, and to employees feeling productive and efficient.⁵ Those with a home office find it easier to switch off at the end of the day, feel better equipped to separate home life from work, and are less concerned about the impact that home working can have on mental health.

⁵ GWI Zeitgeist research, August 2020.

The Lengthening Workday

It's not just a lack of physical space to work. The need or desire to work extra hours is a long-established issue for business professionals, but in 2020 – when so many workers are working remotely for an extended period – it's a behavior with heightened implications, especially for the BETA working in her/his bedroom in a shared apartment.

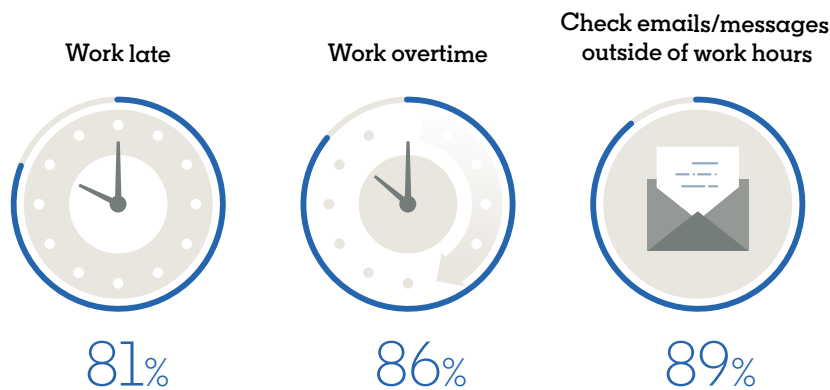
This study confirms working late or putting in overtime are realities for most professionals in all age groups. Globally, 8 in 10 say they are regularly doing both things; within this, about 1 in 10 say they “always” work late, and 15% are “always” working overtime. That acknowledged, these behaviors manifest themselves most strongly among BETAs. Professionals aged 21-40 are 8 points ahead of other professionals for regularly working late. They have a lead of 13 points for regularly working overtime. Seniority and career-stage influence this, but the pattern remains even once this is accounted for.

Professionals aged 21-40 are 8 points ahead of other professionals for regularly working late.

Checking emails / messages outside of work hours is the most frequent encroachment into a professional's personal time, fueled by the ubiquity of the smartphone. Again, it's a behavior widespread in all age groups but which peaks among BETAs; about 9 in 10 among this cohort do this regularly. It's also among BETAs where the greatest number say they “always” check messages outside of work hours (about 4 in 10).

Work-Life Balance Under Strain

BETAs face increasingly acute work-life strain



% of Business Professionals aged 21-40 who say they regularly do the following

Question: How frequently would you say you do the following? Answer options: Always, Few times a week, Once a week, Few times a month, Few times a quarter

Source: GWI Work 2020

Base: 17,692 Business Professionals aged 21-64 in 10 countries

Published in "Work in BETA: The Rising B2B Decision Makers" by The B2B Institute, 2020

The "Always On" Smartphone

Arguably, the central role of the smartphone has one of the greatest potential impacts on work-life balance. More than any cohort which has gone before, BETAs are highly attached to these devices.

It's *not* that BETAs are any more likely than other groups to use a smartphone for work; BETAs do have a slight lead, but the numbers are comparable across all cohorts (65%-70% of all professionals say they use one for work).

The distinguishing factor is that BETAs are the most likely to use personal smartphones for work. Over half globally do this, compared to 40% of 41-50s and about a third of 51-64s. There's differentiation even among the BETAs themselves: the younger the BETA, the more likely they are to utilize a personal phone for work-related purposes. Conversely, the older a professional becomes, the more likely they are to make use of a company-provided one only.

The distinguishing factor is that BETAs are the most likely to use personal smartphones for work.

The prominence of smartphones for BETAs comes through elsewhere in this study, too. Over 70% of BETAs say their smartphone is their most important device in day-to-day life (compared to 50% among 41-64s). Across the 35 online activities tracked by GWI – spanning everything from checking social media and visiting business news sites, to watching videos – BETAs are more likely than other cohorts to do all of them via a smartphone. And they are significantly more likely to do these 35 activities via a mobile exclusively (PCs and laptops remaining much more prominent for other cohorts). On average, BETAs in fact carry out 14 of these 35 behaviors only on their smartphone; the equivalent figure among older professionals is just 8.

These trends help to explain why BETAs estimate spending 3.5 hours on their mobiles each day (peaking at 4 hours among 21-30s). Other professionals report spending just under 2 hours on these devices, dipping to 1 hour and 20 minutes among 51-64s. Put another way, BETAs spend an extra 550 hours per year on their smartphones; if an average workday contains 8 hours, that's the equivalent of BETAs devoting an additional 68.5 working days to their smartphones.

Across all metrics relating to mobiles, there are year-on-year increases among BETAs which are expected but nevertheless substantial. Compared to 2019, for example, BETAs now spend an extra 20 minutes per day on their phones. The number who say that a smartphone is the most important device in their day-to-day life is up by almost 10 points.

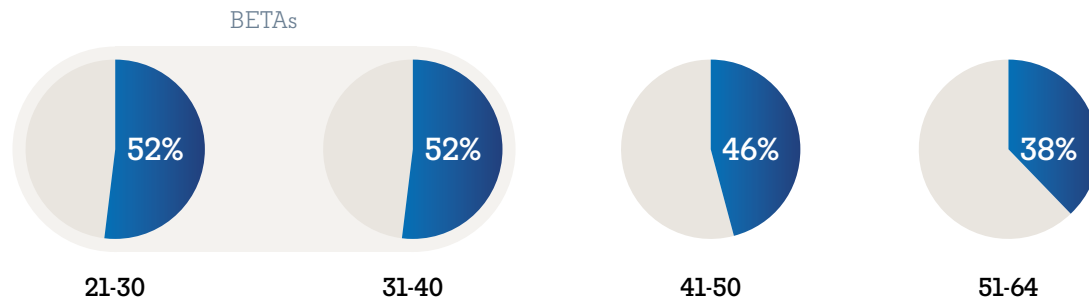
Blurring of Personal and Professional Usage

Although smartphone adoption and usage are rising among all age groups, the biggest blur between personal and work usage is in the BETA cohort. They also have the most anxiety about their device behaviors; 3 in 4 BETAs say they are constantly connected online, 6 in 10 feel it's critical to be always contactable, and a third worry they spend too much time on their phones. In all cases, they outscore other cohorts conspicuously.

It's not just with phones where we see this blurring. Globally, 50% of professionals agree there are many services they use in both personal and professional capacities; year-on-year increases for using tools such as Zoom and Microsoft Teams, whose applications go far beyond professional contact, are profound.

Blurring of Personal and Professional Usage

BETAs are more likely to say they use business services for both personal and professional reasons



% of Business Professionals who say there are many services they use in both personal and professional capacities

% of BETAs by country who say that there are many business services they use in both personal and professional capacities

	India	57		Spain	42
	Singapore	53		Australia	38
	Brazil	52		Germany	37
	U.S.A.	48		Japan	37
	UK	46		France	36

Question: Please select the point on the scale that best describes you/your company - are you at one end of the scale or somewhere in the middle? There are many services (e.g. Zoom) that I use in both personal and professional capacities [chart illustrates responses for those selecting the top two points on the scale]

Source: GWI Work 2020

Base: 17,692 Business Professionals aged 21-64 in 10 countries

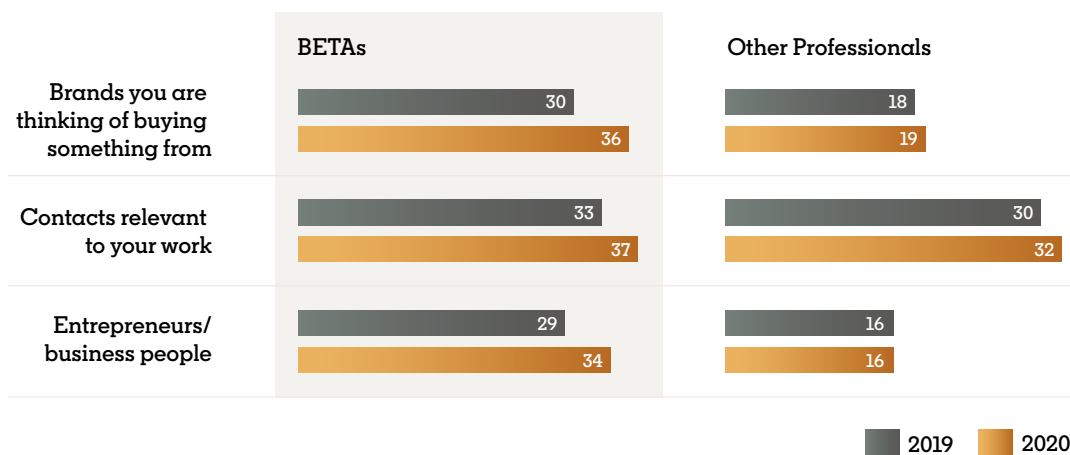
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There's a clear age pattern to this; over half of BETAs report this mix of personal and professional usage, dropping below 4 in 10 for 51-64s. This impacts the services people consider bringing into their workplace; when decision-makers are asked which factors influence them, a fifth of BETAs cite existing personal usage of a product or service.

Blurring is present on social media, too. BETAs are most likely to say that business-related networking is one of the most important reasons they have for using the internet. They are most likely to be following business-relevant individuals or organizations on social media. That's important but, in line with wider age-trends, BETAs also devote twice as much time as other groups to browsing social media.⁶ Age patterns are particularly stark here: 21-30s estimate spending a total of 2 hours 40 per day on social media, whereas the figure drops to 50 minutes among 51-64s. Over a year that is a substantial difference.

"Following" Behaviors on Social Media

BETAs use social media for professional reasons



% of Business Professionals who say they follow these people/organizations on social media

Question: Who do you follow on social media?

Source: GWI Work 2019-2020

Base: 34,586 Business Professionals aged 21-64 in 10 countries

Published in "Work in BETA: The Rising B2B Decision Makers" by The B2B Institute, 2020

⁶ BETAs estimate spending an average of 2 hours and 20 minutes per day on social media, compared to 1 hour and 10 minutes among 41-64s.

BETAs are most likely to say that business-related networking is one of the most important reasons they have for using the internet.

As we'll explore later in the report, personal usage or experience of a product/service is just one influencer among many others. Nevertheless, with BETAs representing the largest group of purchasers for both hardware and software within their companies, the conflation taking place in the lives of today's youngest business buyers has major implications for their B2B purchase decisions.

An Absence of Flexibility

More than ever before, the events of 2020 have made many business professionals crave flexibility – in where they work, how they work and, crucially, when they work. As home and work collide and professional and personal boundaries become still more blurred, the idea of a rigid 9-to-5 workday is under intense scrutiny.

As we've seen, remote and home working has increased exponentially in 2020. But that was something dictated by circumstance and necessity, not by choice. Companies had to allow and facilitate remote working; the pandemic meant there was no alternative. They have had more discretion over flexible working, and yet this study's data suggests that it has not been embraced to anything close to the same extent.

Whereas remote working has considerable year-on-year shifts towards companies permitting it broadly, there's been little or no change for flexible working. Globally, 2 in 10 still say it's not permitted in any circumstances – a drop of just 3 points vs. 2019. A further 5 in 10 say it's allowed in some contexts, with the remaining 3 in 10 reporting that it is embraced broadly. The latter is up by just 2 percentage points year-on-year; in the context of the pandemic, this lack of real change is telling. In fact, it's only among 41-50s and 51-64s that we've seen these minor year-on-year increases; among 21-30s there has been a slight *decline*.

Companies across the world are embracing remote working due to the circumstances but haven't supported this with any real changes in flexible working. This rigidity impacts professionals of all ages, especially among those with young children at home. Even so, it should be remembered that BETAs are the least likely to have a home office. They are the most likely to be working additional hours and checking in after the workday has ended. And they are most prone to blurring the lines between their personal and professional usage of products and services. More than any other cohort, it's therefore the BETAs who are the most directly impacted by the lack of support for flexible working. And their attitudes reflect this. When asked what they most want their companies to do to support workers during the pandemic, the top answer among BETAs is more flexible working. In contrast, the top answer for other professionals is ensuring the workplace is safe for employees to return; given that the threat posed by contracting coronavirus is typically higher for older groups, it's revealing that this group is nevertheless the keenest to return to the workplace.⁷ Broadly, BETAs see 2020 as a moment of change, and want companies to prioritize more flexibility, invest in technology and look towards a post-pandemic future. Other professionals view this period as a stopgap before things get back to normal – i.e., revert to how they were.

BETAs see 2020 as a moment of change, and want companies to prioritize more flexibility, invest in technology and look towards a post-pandemic future. Other professionals view this period as a stopgap before things get back to normal.

Towards a Remote Future

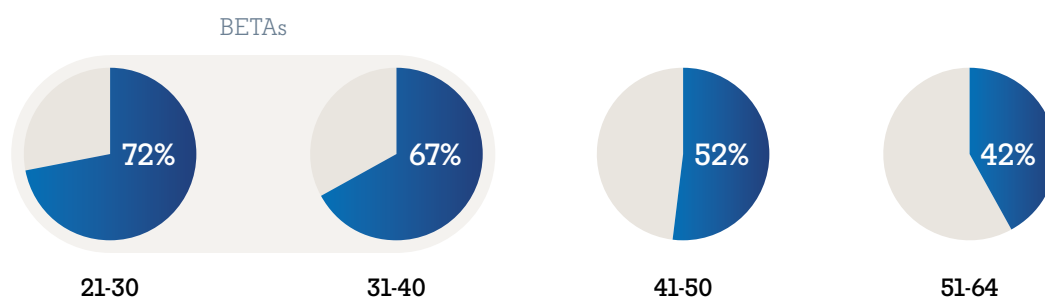
As companies across the world explore ways to reopen offices and encourage employees to start returning, the big question asked by many has been: will office life return to pre-pandemic normality? Or will companies need to embrace a future in which remote working is a much more mainstream proposition?

Some large corporations are putting plans in place to down-size or relocate their offices, anticipating a future where fewer employees are in the office at any one time. A one-size-fits-all model is never going to be likely here, but it's clear that most business professionals want work-from-home to be a larger part of their future.

⁷ Half of 51-64s cited this as one of the measures they most wanted; the equivalent figure among 21-30s was just 37%

Interest in Working from Home Permanently

BETAs are very interested in permanent work from home



% of Business Professionals who say they are extremely or very interested in working from home permanently

% of BETAs in each country interested in permanently working from home

	India	79		Germany	60
	Spain	70		France	54
	Singapore	69		Japan	54
	U.S.A.	66		UK	54
	Brazil	65		Australia	53

Question: How interested are you in the following? Working from home permanently (instead of attending a workplace/office)

Source: GWI Custom Research, 2020

Base: 5,782 Business Professionals aged 21-64 in 10 countries

Published in "Work in BETA: The Rising B2B Decision Makers" by The B2B Institute, 2020

Across the 10 countries in this study, 2 in 3 professionals say they are extremely or very interested in a permanent, full-time work-from-home solution. This is not something wanted by a small minority; it's craved by the majority. The age pattern running through this is stark: figures peak at over 7 in 10 among 21-30s, and then progressively fall to hit just 4 in 10 among 51-64s. Interestingly, though, BETAs are also the least likely to think they'll be allowed to spend more time working from home in the future; they are already anticipating disappointment and frustration.

Across the 10 countries in this study, 2 in 3 professionals say they are extremely or very interested in a permanent, full-time work-from-home solution. This is not something wanted by a small minority; it's craved by the majority.

As we explore later in this report, BETAs have adopted the widest range of communication tools, fully embracing emerging technologies to stay in contact in the most efficient ways; it's likely that this proficiency - together with the lower relative importance they attach to in-person conversations - is driving this interest in full remote-working. With BETAs the most likely to live in urban environments and shared households - with all the expense and space issues that this entails - the ability to work remotely on a permanent basis would allow relocation to locations outside of the daily commute zone. Working from a location of their choosing (whether their own home, or any other venue) could boost their day-to-day circumstances and, in-turn, their perceived work-life balance.

Of course, expressed sentiment doesn't always convert into actual behavior. Apart from many companies not being willing to support permanent, full-time remote working, it's possible that a sense of fatigue over home working could eventually lead some of these workers to long for a more varied routine that includes a mix of home and office locations. It's also difficult to replicate the spontaneous conversations and social elements of being with colleagues in-person.

Regardless of how this sentiment evolves, its current strength has a clear impact on BETAs in their roles as B2B buyers; BETA tech decision-makers are among the most likely to say that "enabling remote working" is a very important factor when considering bringing in a new product or service. As might be expected, the significance of this has risen among other decision-makers (the gap between 21-40s and 41-64s has shrunk from 10 points to 5 between 2019 and 2020). Even so, BETAs still stand out for this, and while some purchase influencers are equal across the cohorts (including type of license and ease of installation), the enabling of remote working remains one area where - for now at least - age does still make a difference.

Blurred Boundaries

Key Takeaways

1

More than for any group which has gone before them, boundaries have dissolved for BETAs: between work and home life, between personal and professional usage of products, and between leisure and business behaviors online.

2

There's no longer such a sharp distinction between someone's personal and corporate personas; BETAs can and do use the same tools and services in both contexts, and their heavy personal usage of smartphones and social media is replicated in their day-to-day business behaviors.

3

Many BETAs perceive themselves as time-poor, permanently connected, and can feel tension in terms of delineating parts of their lives from each other. They are the most likely to lack dedicated workspace at home, the most likely to work outside of scheduled hours, and the most likely to use personal devices for work.

4

BETAs crave greater flexibility and remote work, something which influences the products and services they look to use and purchase. But while businesses have been forced to enable remote working due to the pandemic, there has been no increase in support for flexible working.

The B²B Institute

E IN BETA

Evolving

For the BETAs, their work is their life. Their identity is defined by professional status, personal brand, and continuous self-evolution.

Evolving: Summary

- **Desire for Self-Improvement and Self-Evolution.** The role of professional development for BETAs.
- **Embracing Online Learning.** Tracking engagement with, and motivations for, online learning.
- **Entrepreneurial Mindset.** The attraction of being considered entrepreneurial.
- **Gig Economy Generation.** Exploring whether the 1-person, 1-job model is being challenged.
- **The Quest for Innovation.** Understanding the attraction of innovation among BETAs.
- **The Appeal of Status.** The connection between trendsetting and status-seeking.
- **The Need for Reassurance.** The concept of managed risk, and how it impacts BETA decisions.

Drive for Self-Improvement and Self-Evolution

Like other professionals, BETAs place a strong premium on how success in their own role translates to success for their company. Globally, 3 in 4 BETAs say they know what they need to do in their role in order for the employers to achieve goals. Similar proportions report having a clear understanding of their company's strategy, of their personal objectives, and of how their day-to-day work contributes to business goals being achieved.

These sentiments are remarkably uniform by age; for today's professionals understanding the impact of their role and their personal contribution is an important driver and motivator. Where BETAs stand out is in their desire – whether always realized or not – to innovate, to experiment, to challenge the status quo, and to be recognized for it. Success might matter to everyone, but how it's achieved is where BETAs are re-framing the game.

BETAs express strong views about the importance of professional development. They are most likely to describe themselves as career-oriented, as wanting to achieve more, and wanting to challenge themselves. They are most likely to expect promotions, and they place a higher-than-average premium on job satisfaction.

In part, a natural age effect is at work here; these values have always been most important for younger cohorts before gradually receding as age increases. BETAs won't be different to earlier cohorts that have gone before them; it's a reflection of their life-stage and where they find themselves in terms of their career paths.

What is different is the way some of these attitudes are being manifested, and how they are being catalyzed by the heightened value that BETAs place on things such as creativity and standing out. As an example, some product upsell factors are largely universal (such as support, type of access and additional features), but BETAs are particularly attracted to customization in design and appearance (which other cohorts do not see as so important).

Embracing Online Learning

BETAs are highly engaged with online learning, seeing it as a way to self-improve and boost their work portfolio in a cost-effective and totally flexible medium. A sizable 4 in 5 BETAs are participating in online learning to learn/improve skills, to increase their knowledge, or to gain qualifications. The correlation with age here is a strong one: the younger the professional, the more engaged they are with learning for all the reasons cited below.

A sizable 4 in 5 BETAs are participating in online learning to learn/improve skills, to increase their knowledge, or to gain qualifications.

Engagement with Online Learning

BETAs engage in more professional online learning than Other Professionals

	BETAs			
	21-30	31-40	41-50	51-64
Engage in online learning for any professional reason	84	75	57	42
To learn/improve skills relevant to my job	39	32	26	20
To increase my industry-specific knowledge	33	29	21	16
For general professional development/to gain qualifications	31	27	20	15

% of Business Professionals engaging with online learning for the following reasons

Question: Are you currently undertaking any online courses/learning programs for professional reasons?

Source: GWI Work 2020

Base: 17,692 Business Professionals aged 21-64 in 10 countries

Published in "Work in BETA: The Rising B2B Decision Makers" by The B2B Institute, 2020

The desire to improve professional skills is of course not new or exclusive to BETAs and, as we noted above, part of this is driven by life stage. It's nevertheless true that no business generation before them will have had so many online resources or tools available; while the desire for learning might not be new, the ways in which it can now be facilitated have changed. Employees don't have to wait for learning to be organized (or even funded) by their workplace; they now proactively seek it out, whether in conjunction with their company or not.

Nor has any previous group worked in a time when remote working was so widespread, or when the concept (and infrastructure) of remote learning was so significantly boosted by unique global circumstances. In some of GWI's research on coronavirus attitudes and behaviors, we can see the degree to which this opportunity was seized by BETAs; over 40% of 21-30s and almost a third of 31-40s reported that they were spending more time using online learning platforms during lockdown; the equivalent figures among other groups were just over a fifth for 41-50s and about 15% for 51-64s.⁸

Entrepreneurial Mindset

On a much smaller scale, the BETA enthusiasm for experimenting with different approaches is evident in their approach to employment itself. The long-held 1 person, 1 job model is being challenged by some – with BETAs the age group most likely to report having side ventures or freelance gigs in addition to their job.

The numbers currently doing this are small: globally, 3.6% of BETAs aged 21-30 classify themselves as a “full-time worker with a side venture (such as freelancing or entrepreneurship)”. That compares to 1.6% among professionals aged 51-64. Life-stage is relevant here again: older professionals are the most likely to report themselves as a “business owner/entrepreneur”, with many in the BETA age-range lacking the financial comfort (and therefore ability) to set themselves up as fully-fledged entrepreneurs. Equally, against the backdrop of the pandemic, we should recognize that some people might be maintaining side ventures or additional jobs out of necessity, not choice.

Gig Economy Generation

BETAs are the “gig economy” cohort – the professionals who entered the workplace at a time when capitalizing on one's skills or making maximum value from one's spare time was becoming progressively more mainstream and normalized.

As the country with arguably the most developed “gig economy”, the U.S. is revealing here: 30% of professionals aged 21-30 report supplementing their main job with other work, falling to 20% among 31-40s, 16% among 41-50s and then 14% among 51-64s. It's no coincidence that 13% of these youngest professionals report having undertaken skills-based temporary jobs on platforms like Upwork, Fiverr, Handy or TaskRabbit, compared to 1% of 51-64s.⁹

These numbers suggest that far more people are acting in an entrepreneurial way than would classify themselves as such. As we noted above, economic conditions now necessitate a new and

⁸ GWI Coronavirus Research, Wave 5, July 2020. <https://www.globalwebindex.com/coronavirus>.

⁹ GWI USA, Q2 2020. <https://www.globalwebindex.com/usa>.

more flexible approach to work for some individuals; in the context of the pandemic especially, it may be a matter of survival rather than choice. That acknowledged, this is a trend which will accelerate as the gig economy continues to develop globally; the 1 person, 1 job model is hardly being abandoned, but there are new ways to supplement and innovate around this.

The Quest for Innovation

If online learning and entrepreneurship are more conceptual manifestations of the evolving component of the BETA mindset, then their approach towards, and desire for, innovation is much more overt.

Ask professionals to describe their company's adoption of new technology and software, and age quickly emerges as one of the biggest differentiators over perceptions. Whereas a fifth of BETAs think of their company as an "Innovator" (peaking among 21-30s at 24%), just 10% of 41-50s and 4% of 51-64s do likewise. Similarly, 36% of 21-30s and just 19% of 51-64s position their companies as "Early Adopters". Conversely, older business professionals are more than twice as likely as BETAs to see their company as a "Laggard"; 9% of 21-30s select this term, compared to 21% of 51-64s. A number of factors might help to explain why BETAs are most likely to see their company as an innovator: because BETAs are more likely to work for younger companies; because BETAs have a heavy relative influence over hardware and software purchases; because BETAs actively seek out, or are sought by, innovative companies; or because of a natural age effect whereby younger groups typically see themselves as the most tech-savvy.

The exact factor(s) at work here don't matter; it's the connection between BETAs and the concept of innovation which is important, and it's one which shines through in multiple parts of this study. It reflects two key inter-linked components of the BETA mindset: a genuine desire to refine and improve processes, together with the importance of personal status and the desire to be perceived as an innovator.

Against the backdrop of the pandemic, it's not surprising that all professionals (BETAs included) say the most important initiatives for their businesses in the year ahead are to improve efficiency/productivity and find cost-savings. But improving innovation follows very closely behind, and whereas efficiency and cost-reductions show little difference by age, innovation is one of the areas where we see the biggest generational variation – with 21-30s being more than 14 points ahead of 51-64s.

Two key inter-linked components of the BETA mindset: a genuine desire to refine and improve processes, together with the importance of personal status and the desire to be perceived as an innovator.

Important Company Initiatives for Next Year

Top 2 company initiatives for all professionals

Improving efficiency
& productivity



35%

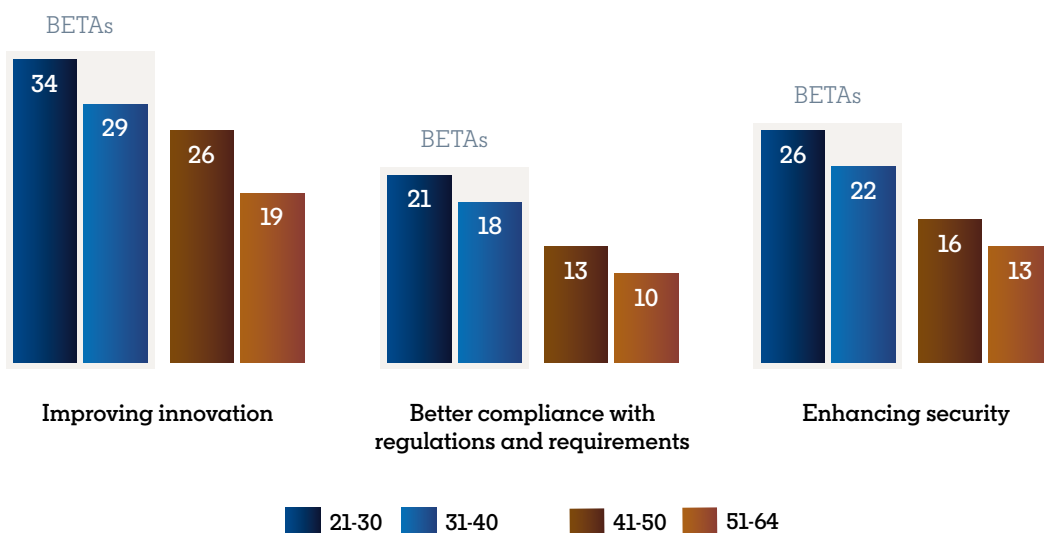
Finding
cost-savings



32%

% of Business Professionals who say the above are important initiatives for their company or team in order to drive growth

Biggest differences: BETAs prioritize innovation, compliance, and security (%)



% of Business Professionals who say the above are important initiatives for their company or team in order to drive growth

Question: Which of these are important initiatives for your company or team to help drive its growth in the next year?

Source: GWI Work 2020

Base: 17,692 Business Professionals aged 21-64 in 10 countries

Published in "Work in BETA: The Rising B2B Decision Makers" by The B2B Institute, 2020

Interestingly, when business professionals are asked if their company is open to new ideas and processes, we see majoritarian (and equal) agreement across all age groups. The same happens for recognizing that adapting quickly is critical to long-term success; from age group to age group, it's over 7 in 10 who agree. It's when words like innovation, adoption and technological enhancement are thrown into the mix that we find much more distinction between age groups. BETAs are much more likely to agree that their company has the tools and systems in place to adapt quickly to industry changes, for example. So too do they have a notable lead for thinking that their company and systems are structured in a way which allows them to adapt quickly to industry changes.

Unpacking this is complex: in part, this is because BETAs are most likely to focus on tech in terms of refining and improving processes – not least because their role as B2B purchasers and influencers of tech means they have bigger proportional influence over this compared to other aspects of their companies. Nevertheless, it also reflects how they want to position themselves, and how they wish to be perceived by their peers.

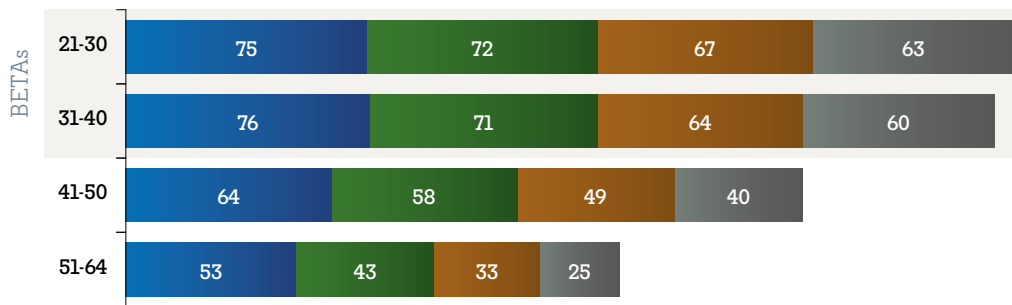
The Appeal of Status

The importance of status for younger groups is certainly not exclusive to the business context; it's well-known that this factor has a considerable influence on consumer behaviors too. As GWI's data spans both the professional and personal lives of BETAs, we can see this coming through very clearly. One obvious example relates to their online persona as a consumer; when asked about the factors that would lead them to advocate or positively review a brand online, BETAs are twice as likely as other groups (and three times as likely as 51-64s) to say they would do this if it enhanced their reputation or status.

Similarly, three quarters of BETAs say that – as consumers – they always like to try new products, and many are vocal about sharing their findings with others. Elsewhere, over 6 in 10 cite keeping up with the latest fashions as a driver – something which manifests itself through a pronounced desire to have the latest tech products. For attitudes of this nature, agreement typically decreases in line with age; BETAs are often 20-25 points ahead of 51-64s.

The Importance of Trends

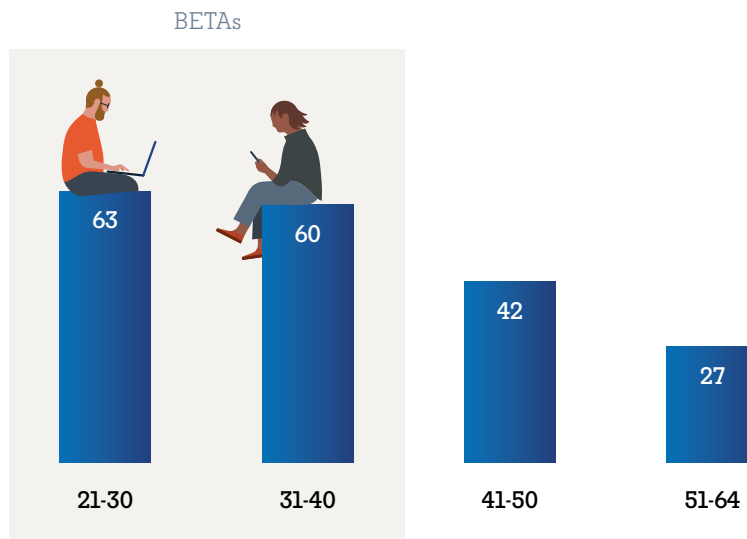
BETAs want to be trendsetters



% of Business Professionals who agree with the following¹

- I always like to try new products
- I regularly inform friends and family on new products/services
- Having the latest technological products is very important to me
- I like to keep up with the latest fashions

BETAs like to stand out in a crowd



% of Business Professionals who agree with the statement "I like to stand out in a crowd"²

¹Question: To what extent do you agree/disagree with the statements below on your perception of yourself? Options: Strongly Agree, Somewhat Agree

²Question: To what extent do you agree/disagree with these statements? Options: Strongly Agree, Somewhat Agree

Source: GWI Work 2020

Base: 17,692 Business Professionals aged 21-64 in 10 countries

Published in "Work in BETA: The Rising B2B Decision Makers" by The B2B Institute, 2020

As we explored in the previous chapter, BETAs are the most likely group to use the same services in professional and personal contexts. Their views and behaviors as consumers are therefore important; if keeping up with trends matters to them in their personal lives, it's likely to exert influence over their professional decisions too.

We see this when BETAs are asked about the reasons which might make them consider bringing a new product or service into their company. Some drivers are universal and cut across age groups; as an example, about 4 in 10 decision-makers in all groups cite improving efficiency as an important initiative for the year ahead, putting it top of the table among the 15 options covered in this study. Comparable consistency is seen for ROI (selected by about 1 in 3), as well as for finding the best supplier (1 in 4).

In contrast, the chance to cut costs across the company becomes increasingly influential with age; it's selected by 1 in 3 overall, but 51-64s (39%) establish a 10-point lead over 21-30s here (29%). BETAs, meanwhile, are more likely to consider bringing in a product or service to keep up with the latest trends (30% of 21-30s vs 20% of 51-64s), or because they know a competitor is using it (22% of 21-30s vs 10% of 51-64s). For BETAs, trendsetting and status-seeking hold more importance.

*"BETAs seek validation when considering a new product/service. They are 1.62 times more likely than other professionals to bring in a new product or service because they know that a competitor is using it."**

BETAs are particularly concerned about ensuring they keep up with peers and competitors in their sector. They are much more likely to say they follow what other companies are posting on social media.¹⁰ When using provider/supplier websites as part of the purchase journey, they attach the most importance to looking at which other companies are already using a solution (40% of BETA purchasers do this, compared to about 30% of buyers in other groups). In a sense, what we're seeing here is the much-discussed Millennial trend of "FOMO" (Fear of Missing Out) being manifested in the business setting.

*Question: What typically makes you consider bringing in a new product or service? Base: 13,016 Business Professionals aged 21-64 who are decision-makers for their company, across 10 countries

¹⁰ 1 in 2 BETA decision-makers do this, compared to 1 in 5 among those aged 51-64

The Need for Reassurance

On face value, the BETA tendency towards experimentation, innovation and status means they should be some of the most amenable to bringing in new products and services – giving them a chance to make their mark while improving processes in their company.

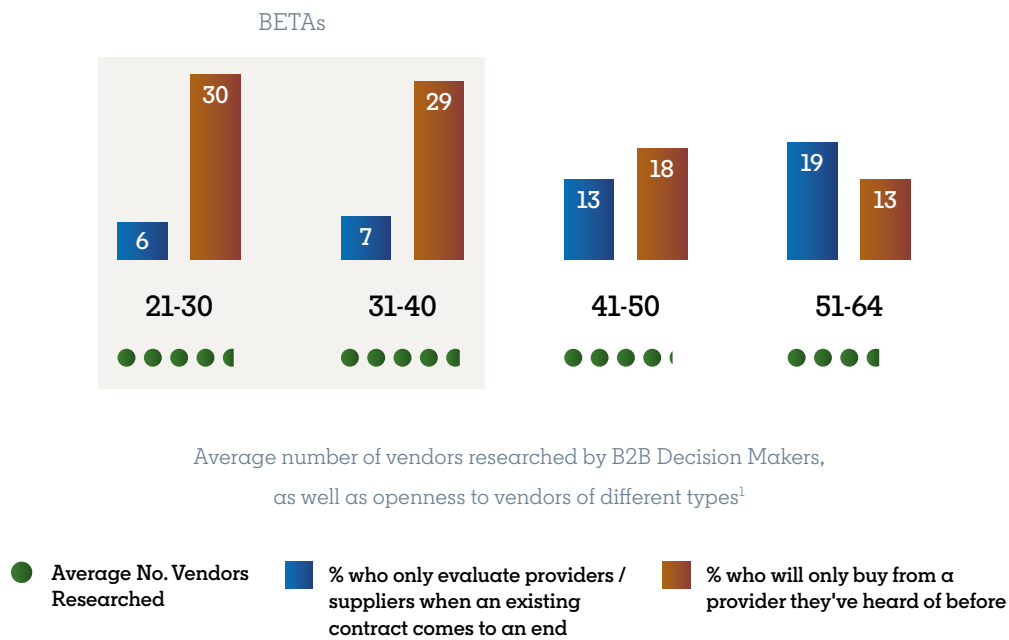
However, this study's data shows a situation which is more complex than that. While BETAs do place a premium on experimentation and innovation, it's best described as "safe" innovation; more than any other cohort, BETAs want to be reassured before making their choices. This speaks to the reputation they want to forge among their peers; they are most likely to say that being respected by others is important to them, and the B2B purchase decisions they make feed into this.

While BETAs do place a premium on experimentation and innovation, it's best described as "safe" innovation; more than any other cohort, BETAs want to be reassured before making their choices.

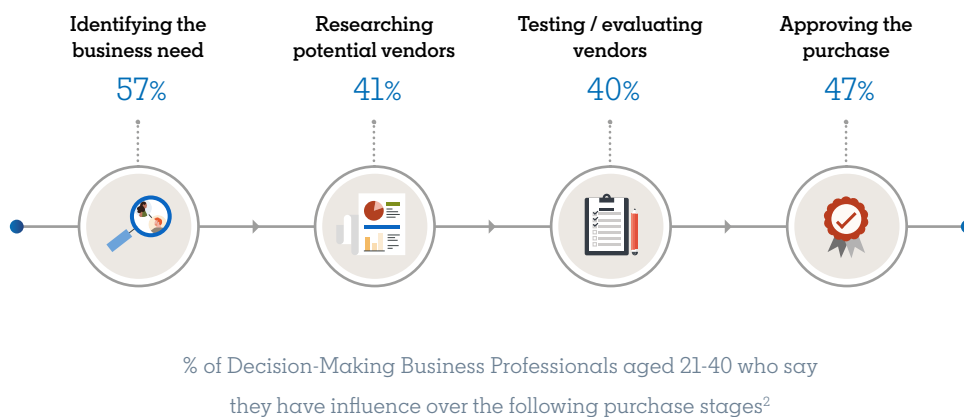
The ways that BETAs approach vendor selection shows an interesting tension that results from this phenomenon. Despite expressing an openness to innovation, to new ideas, and to new products/services, BETAs spend the most time on research, explore the widest range of vendors, and yet are the most likely to ultimately pick one that they already know. Globally, a quarter of B2B decision-makers say they will only buy from a vendor they've heard of, but this peaks at 30% among 21-30s and drops to just 13% among 51-64s.

Vendor Research vs Selection

BETAs consider more vendors more often, but they only select those they know



BETA Influence by Purchase Stage



¹Questions: Thinking of your typical research process for a new product or service, how many vendors or service providers do you consider? / Which of the following best describes how your company evaluates your providers and suppliers?

Base: 13,016 Business Professionals who are decision-makers for their company aged 21-64 in 10 countries

²Question: Which parts of the purchasing process do you have influence over?

Base: 6,100 Business Professionals aged 21-40 who are Decision-Makers for their companies in 10 countries

Source: GWI Work 2020

Published in "Work in BETA: The Rising B2B Decision Makers" by The B2B Institute, 2020

Naturally, this could be driven in part by diligence or the fact that, as younger professionals, they've spent less time in the industry. But for BETAs, the brand name really does matter; they will be most drawn to names that have a ring of familiarity and an established reputation, something which means the role of branding - including in the online space where BETAs carry out so much of their research - is more important than ever. It's influenced strongly by a need for safety and security in the choices they make - especially as BETAs report having the highest numbers of stakeholders involved in purchase decisions, as well as the widest range of departments to navigate (BETAs say that an average of 7.4 people and 2.7 departments are involved; the equivalent figures among 41-64s are 5.5 and 2.4). That gives them more people to consult and bring on side, as well as a wider pool of scrutiny once a decision has been made. This increased professional exposure is translating into more pressure on the B2B decisions they make.

Interestingly, their business behaviors find reflection in how they interact with brands in their personal lives as consumers; BETAs are the most likely to say they would pay more for a brand they know, whereas 41-64s (and 51-64s in particular) are most likely to say they would pay less for a cheaper brand. Across metric after metric, we see that cost as a driver doesn't hold quite the same strength for BETAs as it does for other professionals. It's not that cost is unimportant for BETAs - far from it. Rather, it's that it holds less relative importance for them, and must compete against a wider range of other factors.

BETAs are the most likely to say they would pay more for a brand they know, whereas 41-64s (and 51-64s in particular) are most likely to say they would pay less for a cheaper brand.

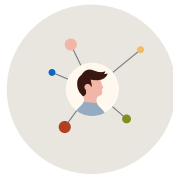
The opportunities for B2B suppliers to disrupt the current status quo are clear, especially as BETAs are the least likely to wait until the end of a contract before evaluating new solutions. Providing a sense of reassurance is key, as is understanding the seemingly contradictory mindset at work here: BETAs have the strongest levels of agreement for thinking that they are quick decision-makers who make choices based on gut feeling, yet they are also the most likely to seek expert opinions before making purchases, and the most amenable to being influenced by other people's opinions. They want to be (seen as) decisive, bold, and innovative, but, they proactively and meticulously seek certainty before committing to a decision.

One clear manifestation of this is the power of reviews and endorsements during B2B purchase research. Just over half of BETA decision-makers say that expert recommendations from within their network are very influential for them, putting them at the top of the table among the 16 different sources that this study covered. Similar proportions say the same about user reviews and recommendations from industry analysts. These notably outperform recommendations from colleagues, friends, or contacts which, while still influential, don't carry quite the same clout (42%). Conferences/events (45%), supplier websites (44%), and supplier demos/trials (42%) also come behind trusted recommendations.

Top Channels/Influencers for B2B Purchase Research

BETAs are most influenced by expert recommendations and reviews when researching products/services

Recommendation from
experts in my network



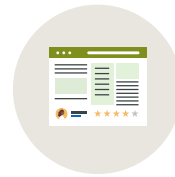
53%

User reviews



51%

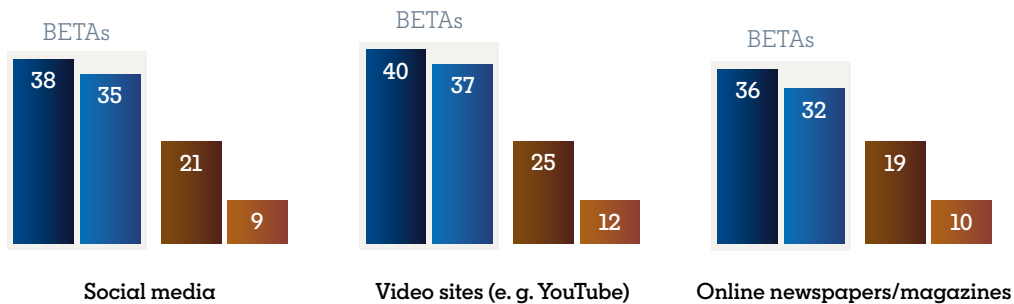
Recommendations from
industry analysts



50%

% of Business Professionals aged 21-40 who say the above are very influential when researching products/services

Biggest differences: BETAs are influenced by social media, video, and online newspapers/magazines when researching products/services



% of Business Professionals who say the above are very influential when researching products/services

% of BETAs who say recommendations from experts in their network are very or quite influential

	India	95		U.S.A.	87
	Brazil	95		Australia	86
	Singapore	92		Germany	85
	Spain	90		France	84
	UK	88		Japan	73

Question: When you are researching or considering a new product/service for your company, how influential are the following information sources? Very influential

Source: GWI Work 2020

Base: 13,016 Business Professionals who are decision-makers for their company aged 21-64 in 10 countries

Published in "Work in BETA: The Rising B2B Decision Makers" by The B2B Institute, 2020

If we expand the criteria beyond “very influential” to look at any level of influence, the powerful role of expert recommendations is particularly evident; globally, 92% of BETAs are taking note of them, with the figure passing 90% in India, Brazil, Singapore and Spain.¹¹ Experts matter to this cohort, but those experts need to have qualifications that BETAs can verify (whether that’s because they know the contacts from their own network, or because the experts command a position of respect in the industry).

As we might expect, reviews and recommendations are important for B2B purchasers of all ages, even if BETAs might attach the highest significance to them. The channels and ways through which BETAs seek out this information is however notably more varied to those who have gone before them; we see the biggest age variation for social media, video sites and online articles, with BETAs very much at the forefront. They cast a wider net, seek out recommendations and reviews from more diverse sources which – at least in part – is influenced by social media and mobile.

¹¹ Respondents were asked “When you are researching or considering a new product/service for your company, how influential are the following information sources?”. Answer options for each source were “Very influential”, “Quite influential” and “Not influential”.

Evolving Key Takeaways

1

BETAs place a strong focus on self-improvement, self-evolution, and innovation; they demand of themselves both personally and professionally, and they want to be trend-setters embracing new ideas and solutions. They are highly engaged with online learning, highly conscious of how they manage their professional identities, and highly attracted by the concept of entrepreneurialism.

2

Appearances matter for BETAs. In the decisions they take, they are disproportionately influenced by the desire for respect, recognition and status among their peers.

3

BETAs want to be risk-takers but are a little more risk-averse than they might realize or choose to let on. They want to make bold decisions, they want to adopt new solutions, and they want to demonstrate an innovative mindset (sentiments which are being fostered and promoted further through the challenges presented by the pandemic). But they also want to be safe and reassured in their decisions; they want to stand out only once they are confident in their choices, with input from experts and trusted recommendations being a key way to achieve this.

The B²B Institute

T IN BETA

Tech Native

For many professionals, the explosion of technology in the early 2000s was an inflection point in their careers. For the BETAs, it was the starting point. This cohort's careers began when digital work, social media saturation, disruption, and smartphone culture were the norm.

Tech Native: Summary

- **Time in Demand.** Understanding the pressures and commitments that BETAs face each day.
- **B-Commerce.** The elevated role of online sales processes and the pandemic's impact on in-person sales opportunities.
- **Tech Natives.** Exploring the implications of BETAs being the first generation to enter the workplace as true digital natives.
- **Changing Workplace Devices.** Quantifying the rise of the smartphone as a work device.
- **Informal but Efficient Communicators.** The number and variety of comms channels being utilized by BETAs.

Time in Demand

On a typical workday, the average BETA will receive 32 emails. They will have at least 3 meetings to attend, and about 3 external work partners with whom they communicate (clients, vendors, contractors, etc.). They will use about 3 different devices for work. They will have roughly 4 active projects and will use about 5 different apps or software programs to manage and collaborate on these projects. Their team or company will have work-related accounts on about 4 different social media platforms which might need attention.

Their use of tech to help manage their time is a hallmark of the BETA mindset.

Year-on-year 2019-20, almost all of these commitments on their time have seen a gentle increase; in part this is driven by the increased prominence of remote working and the reduction in face-to-face time and conversations that this entails. Across 2020, BETAs will deal with an average of 8,500 emails and close to 800 meetings.

Compared to other professionals, BETAs have more emails, more meetings, more apps to use, and more forms of communications to juggle. Admittedly, that might not tell the whole story; perhaps the older groups have longer but fewer meetings, sucking up a greater proportion of their day. The point here, however, is not whether they have more or fewer commitments than other groups, compared to last year. Rather, it's to focus on just how many demands BETAs have on their time each day.

Stating that a business audience is busy and time-poor is not a new insight; professionals of any age, in any sector, are likely to feel pressure in this area. But as a digitally native group operating in the context of the pandemic, the behaviors this catalyzes among BETAs are worthy of our attention. The circumstances might be the same for all professionals, but the ways in which they will navigate and respond to this will not be. Their use of tech to help manage their time is a hallmark of the BETA mindset.

B-Commerce

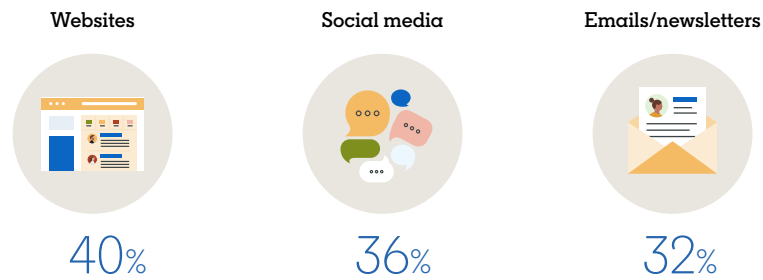
Among the many disruptions that the pandemic has brought to workplaces, changes in how B2B vendors are able to communicate and interact with prospects/purchasers is a significant one. Companies across the world have announced that no external visitors will be permitted into offices for the foreseeable future. Major trade conferences and exhibitions have been postponed, canceled, or reworked to become online-only. Employees are not at their desks as frequently, if at all, reducing opportunities to reach them on their landline telephones. For a vendor used to operating via in-person meetings or calls, this has required a profound rethink. Inevitably, the sales process will need to become much more online-centric – which is a trend very much in line with how BETAs want to operate.

At the very outset of the process – before they reach the stage of wanting contact with a vendor – the internet is a dominant driver for BETAs; when asked how they keep up with the latest news, developments, and products/services in their sector, it's websites, social media and emails/newsletters which top the table. If we look at the biggest differences between BETAs and other professionals, we find the latter placing a higher premium towards conversations; this gives further context for why this cohort is the keenest to return to the office and get back to the pre-pandemic “normal” way of doing things. In contrast, 21-40-year-olds skew heavily towards online channels; conversations rank a much lower 7th for this group (out of the 17 options asked about in the study). Online is also where we find the bigger levels of growth in the study among BETAs; compared to 2019, social media and webinars are both up four points, while videos have climbed by 6 points.

Inevitably, the sales process will need to become much more online-centric – which is a trend very much in line with how BETAs want to operate.

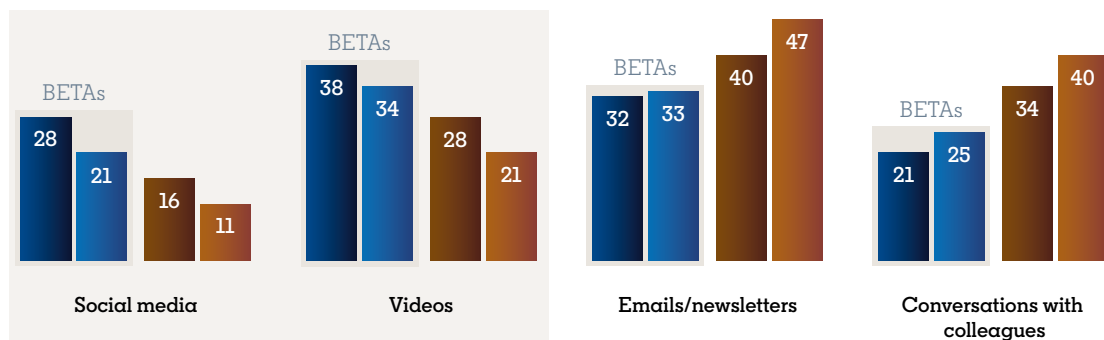
Keeping up with the Industry

BETAs primarily use websites, social media, and emails/newsletters to keep up with industry news



% of Business Professionals aged 21-40 who say they keep with news in the industry via the following

Biggest Differences: BETAs prefer social media and video to keep up with industry news



% of Business Professionals who say they keep with news in the industry via the following

21-30 31-40 41-50 51-64

Question: How do you keep up with the latest news, developments and products/services in your sector?

Source: GWI Work 2020

Base: 17,692 Business Professionals aged 21-64 in 10 countries

Published in "Work in BETA: The Rising B2B Decision Makers" by The B2B Institute, 2020

Once the sales process starts, most BETAs do want contact with vendors; completely self-serve options are not attractive. But as with other business professionals, they prefer that initial contact to be online via email. Social media is another option, driven by markets like Brazil and India, where this channel has become more established in a wider range of contexts. In most of the other countries in consideration, it's still about a fifth to a quarter of BETAs who want to interact via social media; that means it's still relatively niche for now, even if there's growth to come.

Vendor Contact Preferences

BETAs prefer to email or call vendors



% of Business Professionals aged 21-40 who prefer to contact suppliers in the following ways

Question: How do you typically prefer to make contact with a supplier you are interested in buying from?

Source: GWI Work 2020

Base: 6,100 Business Professionals aged 21-40 who are decision-makers for their company, across 10 countries

Published in "Work in BETA: The Rising B2B Decision Makers" by The B2B Institute, 2020

When researching vendors, online options shine through again. The top sources of all are channel-agnostic (recommendations from experts, user reviews, and recommendations from industry analysts, all with 50%+ saying they are very influential), but the next most important things for BETAs are conferences/events (45%), and provider/supplier websites (44%). Although the pandemic forced an abrupt and unscheduled transition from in-person conferences (and the face-to-face conversations and entertainment opportunities that they entail), it's questionable how quickly things will revert to pre-pandemic "normal" once the disruption recedes. With air travel not forecast to return to previous levels for several years - and online events quickly becoming established as an acceptable (and more eco-friendly) way of doing things - it seems inevitable that fewer business professionals will be traveling as frequently as they once did.

BETAs were the most avid conference and trade show attendees; 4 in 10 among this group say they were regularly attending them, compared to a quarter among older professionals. Whether they showed up for the presentations and exhibitions, or for networking, it's clear that the short- (and perhaps longer-) term shifts away from in-person moments towards digital-first or online-only engagements presents big implications. This is particularly true for B2B vendors who used such moments to connect with their potential customers. It's harder to entertain, engage and capture attention in online contexts, and the types of incentives that might previously have been used in the sales process to build relationships and rapport (tickets to leisure events, drinks events, etc.) will need to evolve.

Currently, just a third of BETAs globally say webinars are useful when buying a product/service.

The uncertain future of conferences means that webinars, supplier websites and any other online alternatives all enjoy elevated importance. Almost 50% of BETAs say they regularly attend webinars (dropping to 40% among 41-50s and 35% among 51-64s). Currently, though, just a third of BETAs globally say webinars are useful when buying a product/service, dipping below a quarter in Germany, Singapore, Brazil, and France. For the trend-setting and innovative-seeking BETAs, positioning may be key here; as we've seen, most BETAs are very actively engaged with online learning and want to keep up with the latest offers in their sector, and hence should be receptive to what webinars are trying to achieve. Repackaging webinars more in the vein of "learning events" might help them to resonate more strongly; the concept of a webinar could feel dated to some.

Webinars and Online Events

% of BETAs who say they find webinars/online events useful when purchasing a product or service

 India	36	 Japan	25
 Spain	30	 Germany	24
 U.S.A.	29	 Singapore	24
 UK	29	 Brazil	23
 Australia	28	 France	17

Question: When looking to buy a new product or service, which content do you find most useful?

Source: GWI Work 2020

Base: 13,016 Business Professionals who are decision-makers for their company aged 21-64 in 10 countries

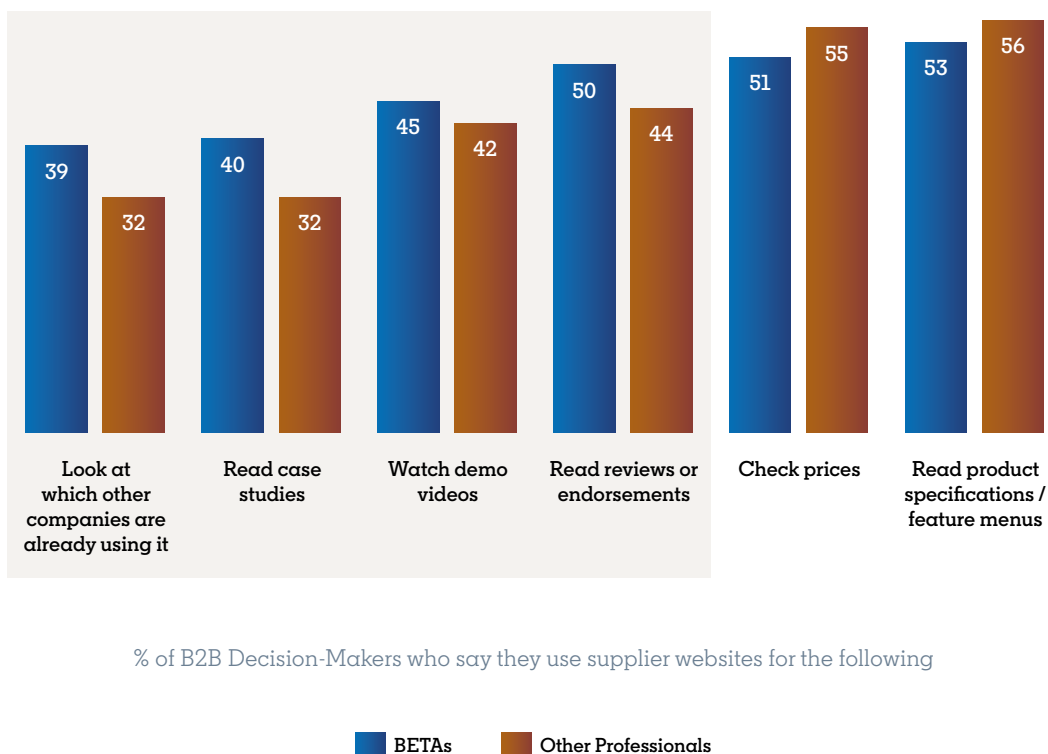
Published in "Work in BETA: The Rising B2B Decision Makers" by The B2B Institute, 2020

For supplier websites, the most important behaviors for all groups are functional – checking prices and reading product/feature specs (both of which do increase slightly in line with age). Beyond that, BETAs are more likely to be validating their potential decisions; half of them read reviews and endorsements, and 4 in 10 look at case studies. Significantly, almost 4 in 10 check which other companies are already using a solution. This resonates with what we saw earlier; trusted recommendations and confirmation of their choices are important drivers for BETAs. When they make their recommendations to the purchase committee, they want to be confident it's a choice that will be well-received.

Repackaging webinars more in the vein of "learning events" might help them to resonate more strongly; the concept of a webinar could feel dated to some.

Supplier Website Behaviors

BETAs seek validation from supplier websites



Question: When using provider/supplier websites to research products/services, which of the following do you typically do?

Source: GWI Work 2020

Base: 13,016 Business Professionals who are decision-makers for their company aged 21-64 in 10 countries

Published in "Work in BETA: The Rising B2B Decision Makers" by The B2B Institute, 2020

In their consumer lives, digitally native BETAs exhibit strong preferences towards e-commerce. As just one example of this, two-thirds of them say that – given the choice – they would prefer to shop online rather than in-store/face-to-face; that compares to just half of 51-64s who say the same. What we're seeing here is this preference for e-commerce, and for the ease and convenience it offers, influencing their business behaviors too. Galvanized by the pandemic, this movement towards "b-commerce" will continue to gather momentum.

Tech Natives

When older BETAs were first entering the workplace in the early 2000s, the rules of engagement for communication were fundamentally reset. In their first years of work – not long after Amazon (1995) and Google (1998) had appeared on the scene – they saw LinkedIn (2003) and Facebook launched (2004). They witnessed the start of YouTube (2005) and, just a couple of years later, they got their first iPhones (2007).

Although something of a cliché, it's legitimate to think of older BETAs as the early adopters of the technology and communication platforms that we now take for granted. Meanwhile, younger BETAs are the first cohort who entered the workforce with social media and smartphones an integral and far-reaching component of their day-to-day lives. It's no surprise that this cohort in particular expresses the most enthusiasm about future innovations in areas such as AI and automation.

Over time, the playing field of tech adoption has of course leveled out. But while overall usage might be comparable, precise behaviors and habits are not – and it's by focusing on this that we see how workplace communications will continue to evolve as BETAs get older.

Changing Workplace Devices

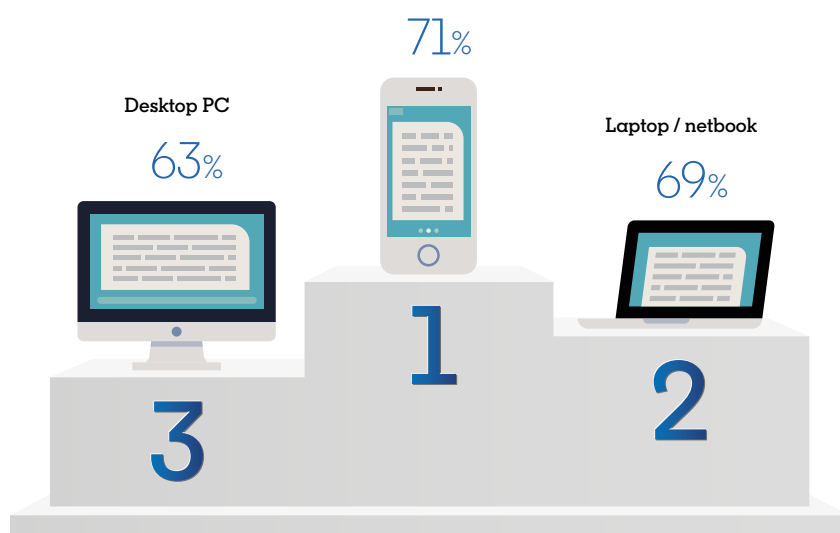
For many years now, we've heard commentators talk about the mobile revolution in terms of consumer behaviors, with smartphones being the most favored devices that capture an increasing amount of time and facilitate an ever-broadening range of activities.

2020 is the first year that smartphones have moved to the top of the table for workplace devices, taking pole position after a 6-point year-on-year drop for desktops. They are now the most popular and commonplace device for BETAs. For 41-50s, smartphones still take second place behind laptops; for 51-64s, they lag behind desktops. The direction of travel in all groups is clear, though; smartphones and laptops are growing, whereas desktops and other older devices are on the decline.

2020 is the first year that smartphones have moved to the top of the table for workplace devices.

Workplace Devices

Smartphone use tops the list of BETAs' work devices for the first time in 2020



% of Business Professionals aged 21-40 who use the following devices for work

% of BETAs using a smartphone for work

	Brazil	77		Singapore	62
	India	77		U.S.A.	58
	Spain	67		UK	55
	Japan	63		France	54
	Australia	62		Germany	53

Question: Which devices do you use for work?

Source: GWI Work 2019-2020

Base: 17,692 Business Professionals aged 21-64 in 10 countries

Published in "Work in BETA: The Rising B2B Decision Makers" by The B2B Institute, 2020

In business contexts, there is a limit to how pervasive smartphone usage can be; certain jobs simply cannot be carried out effectively on the smaller screens of mobiles. Even so, we saw earlier how BETAs as consumers are undertaking the widest range of activities on their smartphones (including many behaviors which are now mobile-only), and with increasingly blurred lines between personal and professional digital behaviors, this will be influencing their work activities too.

Fixed line telephones are one of the biggest casualties of this trend. Germany, Japan and France are the only countries where more than 50% of business professionals now say they use one and, among BETAs, that list reduces to Germany only. In fact, just a third of BETAs globally report usage of a fixed line telephone for work, compared to over half of 51-64s. The notion of calling someone on their office line as they sit at their desk looks increasingly dated, even before we consider the mass remote working brought about by the pandemic. The traditional sales call as we once knew it could soon be a thing of the past.

The notion of calling someone on their office line as they sit at their desk looks increasingly dated, even before we consider the mass remote working brought about by the pandemic.

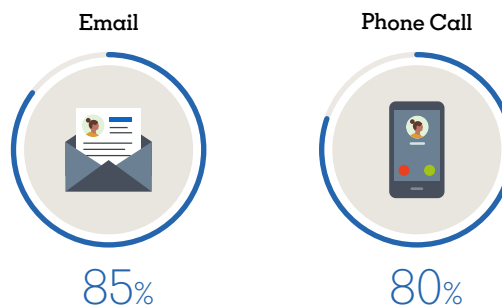
Informal But Efficient Communicators

We've already seen business professionals receive a sizable number of messages, notifications, and updates on a typical workday. Although BETAs are not unique in that respect, we do see differences in the tools they use to manage communication. Across the 9 communication channels asked about, BETAs use an average of 7 of them. This then drops in line with age, sitting at 4 channels among 51-64s.

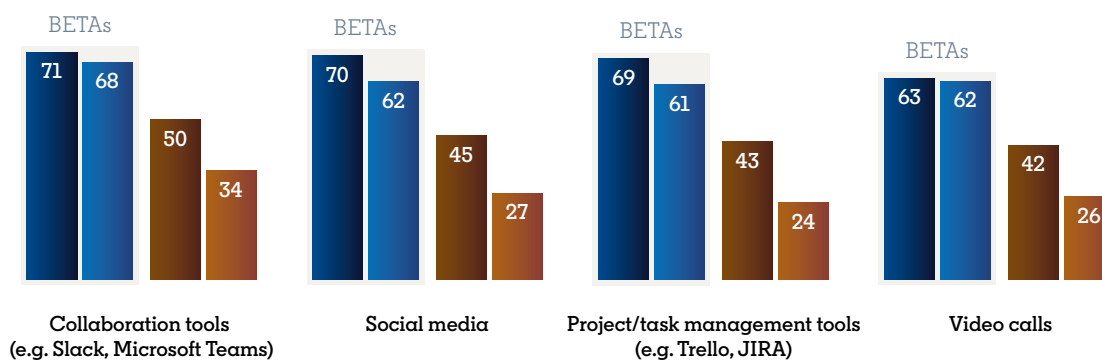
Communication Channels

All Business Professionals primarily use email and phone to communicate

% of Business Professionals who say they use the above comms channels at least once per day



Emerging tools for the BETAs



% of Business Professionals who say they use the above comms channels at least once per day

21-30 31-40 41-50 51-64

% of BETAs using collaboration tools on a daily basis

	India	80		Singapore	64
	U.S.A.	68		Brazil	62
	UK	66		Spain	61
	Australia	65		France	56
	Germany	64		Japan	56

Question: On a typical day at work, how frequently do you communicate with other employees via the following means? Options: Every hour, Several times a day, 2-3 times a day, Once a day

Source: GWI Work 2020

Base: 17,692 Business Professionals aged 21-64 in 10 countries

Published in "Work in BETA: The Rising B2B Decision Makers" by The B2B Institute, 2020

As might be expected, emails remain the most popular form of business communication, across all cohorts (85% of business professionals say they use email at least once a day). Phone calls take a close second (80%) and, once again, there's a lot of consistency between age groups.

Progressing further down the list, stark differences begin to emerge. The youngest professionals are over 40 points more likely to use project management tools or social media as a communication channel. They are over 30 points more likely to utilize messaging services, video calls, or collaboration tools. And they are 25 points ahead in using text messages. With very few exceptions, we see usage of each of these "newer" channels peaking among 21-30s and then dropping in each subsequent age cohort.

In part, these trends will be influenced by the younger age of the companies that BETAs work for, as well as the nature of work that each cohort is undertaking. We've already seen that BETAs have more meetings, and more stakeholders to navigate; they are also more likely to communicate with people in several time zones/countries (over a third say they regularly must do this, compared to a quarter of other professionals). Similarly, over a quarter of BETAs say that they work with different people/teams every day – a figure which compares to 15% among 41-64s. Put another way: BETAs have a bigger diversity of communication needs.

It's worth noting that these trends have been influenced by the pandemic; compared to 2019, video calls (up 10 points) and collaboration tools (up 7 points) have seen the most notable growth for daily usage. That acknowledged, the pandemic has done little more than catalyze trends which were already established.

40% of BETAs say they use social media to discover new products/services for work.

The wider range of comms channels being adopted by BETAs brings implications for how, when, and where they communicate – especially in the context of smartphones now being their most used work device. Although they still need the formality of emails, the mix of other channels will be promoting a more informal style of communication; a conversation held via a messaging service or collaboration tool simply doesn't require the same formality or time to compose as more traditional channels. The impact of this stretches beyond internal communication inside a company. Over three quarters of BETAs say they speak to vendors on a weekly basis, for example. 40% of BETAs say they use social media to discover new products/services for work.

Whether for internal or external comms, BETAs are deploying a broader range of communication channels than any cohort that has gone before them, choosing which ones best serve their needs and adapting their communication style accordingly. With collaboration tools and office software programs encouraging communication between companies as well as within them, conversations that might previously have taken place via formal channels can now take place in much more informal contexts.

Some might wonder about the potential stresses inherent to keeping up with multiple communication channels, and whether switching between apps is contributing to the pressures on their time. Yet younger BETAs are the most likely to say they prefer being included in as many communications as possible so they know what's going on - something which might tap into the sense of FOMO that we noted earlier. Clearly, though, they don't feel a pronounced need for any reduction in terms of volume, and it could be argued that it's their efficient usage of different tools which is facilitating this mindset - communications can be much quicker, and therefore time-efficient, on some channels vs. others if used fluently.

BETAs place the highest premium on tech solutions that can connect with other applications - for a cohort who enjoy so many different channels via which to communicate, they want integration to be as seamless as possible.

Tech Native

Key Takeaways

1

Whether perception or reality, BETAs report having more demands on their time than other professionals: more channels to use, more messages to process, more stakeholders to answer.

2

Using a more diverse range of communication tools in the workplace is one way that BETAs are responding to the pressures placed on their time. Most of these comms channels are increasingly centered around the smartphone - with 2020 the first year in which mobiles topped the table of devices used for work (moving ahead of laptops and desktops).

3

Older or more traditional channels are far from being abandoned; rather, they are becoming less prominent than they once were as the portfolio utilized by BETAs grows broader and – from their perspective – more efficient.

4

A dramatic reduction in face-to-face conversations and in-person meetings means more innovation in how to connect and build relationships with audiences online, as well as a more prominent role for online sales processes. The challenge is to hold the attention of BETAs online as the latest notification or message pings across their device.

The B²B Institute

A IN BETA

Activist

As consumers, the BETAs demand brands take action on social justice issues. The same holds true for the BETAs in business.

Activist: Summary

- **Values Across Generations.** Asking whether different generations hold different values, and if this manifests in B2B contexts.
- **Issues Matter.** Exploring responses to today's issues, with particular reference to the Black Lives Matter movement.
- **Values Matter.** Understanding the relative importance of key values to BETAs.
- **The Pandemic's Impact on Values.** Considering whether the pandemic has softened or decelerated values that had been gaining momentum.
- **Expressed Sentiment vs Actual Behaviors.** Recognizing the tension between the values that people hold, and the reality of their subsequent behaviors.

Values Across Generations

Much ink has been spilt over the question of whether younger generations hold more progressive values, and whether they want their actions to be framed by them accordingly. To date, much of this focus has been on the consumer; here we explore the idea that BETAs might express distinct or uniquely developed beliefs which influence how they expect to interact with their own company, as well as those with which they are doing business.

Issues Matter

In 2020, the pandemic has understandably dominated the news agenda – often leaving little space for anything else. Arguably, just one other issue has been able to capture consistent, global attention during the pandemic: the Black Lives Matter movement. For instance, this post¹² from LinkedIn member Siji Onabanjo generated significant discussion on Black Lives Matter, garnering over 137,000 likes and thousands of comments. Originating in the U.S. but quickly spreading to other regions, Black Lives Matter can legitimately be discussed as a global movement even if the exact responses in each country are framed by local cultural nuances.

Using GWI's custom research on this subject, we are able to see what business professionals expect from companies in response to the Black Lives Matter movement – going beyond consumer-facing actions alone to include internal changes.¹³ Overall, 83% of business professionals want to see companies taking at least one of the 8 possible brand-actions listed in the study - covering everything from reviewing hiring policies and ensuring diversity in leadership to supporting local initiatives and making charitable donations.

¹² <https://www.linkedin.com/pulse/black-lives-matter-yes-even-workplace-siji-onabanjo/>

¹³ <https://blog.globalwebindex.com/chart-of-the-week/blm-and-brands-response/>

Issues Matter

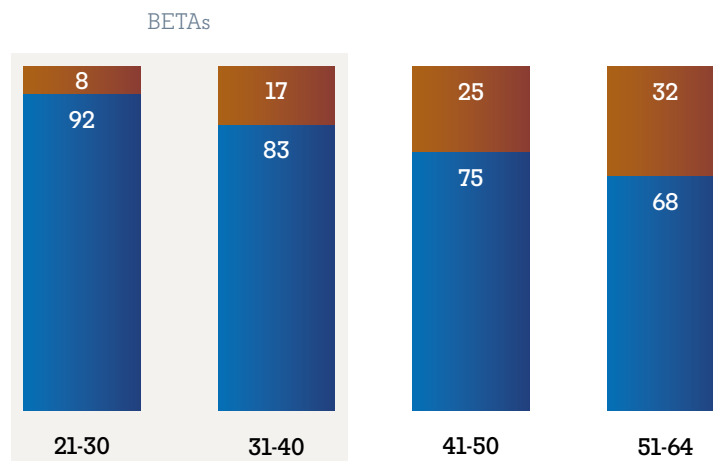


Country spotlight: BETAs in the U.S. expect brands/companies to take the following actions to support the Black Lives Matter Movement



% of Business Professionals aged 21-40 in the U.S. who want to see brands/companies doing the above to support the Black Lives Matter movement

Globally, BETAs exhibit an increasing demand for brands/companies to support the Black Lives Matter movement



% of Business Professionals who want to see brands/companies doing any or none of the above to support the Black Lives Matter movement

Any of the 8 actions above None of the 8 actions above

Question: Which of these, if any, do you think brands/companies should be doing to support the Black Lives Matter movement?

Source: GWI Custom Research, 2020

Base: 5,782 Business Professionals aged 21-64 in 10 countries

Published in "Work in BETA: The Rising B2B Decision Makers" by The B2B Institute, 2020

This does not automatically mean that the other 17% don't support the movement, or the issues at stake; the only safe conclusion is that – for a mix of reasons, no doubt – 17% of professionals don't feel it appropriate for companies to act. It's in this context that the age split is revealing: BETAs are much more likely than other professionals to expect a brand to act in response to an important issue like this. Globally, just 12% of BETAs don't want to see any of the potential responses included in the research; among BETAs aged 21-30, the figure is just 8%. This figure increases in line with age, standing at a third among those aged 51-64.

Across the 10 countries in question, business professionals are most likely to want companies to support local or national initiatives in the community. BETAs are aligned with this, but among the youngest contingent of the group there's above-average figures for showing support via social media. It's here where we see the importance of understanding how values play out in each country. In the U.S. and UK, using social media to show solidarity with the cause is one of the lowest-scoring options among BETAs; this reflects a concern among some that (only) using this channel to demonstrate support could be superficial or too performative. Instead, BETAs in these markets prioritize internal reflection and change – with reviewing hiring policies and ensuring diversity in leadership being the top responses. In stark contrast, social media support is hugely popular – and one of the highest-scoring options – among BETAs in places like Brazil and India; these represent countries where a company's actions on social channels are often seen as much more fundamental.

The values driving BETAs are comparable across markets, but the appropriate response to this can vary. The key takeaway here is that almost all BETAs believe it's right for a company to enact meaningful responses and changes in the face of an important issue. BETAs want to see action being taken.

Values Matter

Examining the qualities that professionals expect brands to demonstrate shows that some are universal. Whether younger or older, there's consistent support for brands being innovative, for example; about half want to see this quality, with all cohorts scoring comparably. Age divisions for other qualities can be much more discriminatory: older groups see more value in brands being reliable, authentic and, to an extent, traditional.¹⁴ This final term ranks quite low compared to other options, but speaks to many of the trends we've seen in this report where older cohorts are more likely to favor "business as normal" outcomes.

Almost all BETAs believe it's right for a company to enact meaningful responses and changes in the face of an important issue. BETAs want to see action being taken.

¹⁴ Reliable is selected by 51% of 21-30s, 57% of 31-40s, 65% of 41-50s, and 77% of 51-64s. Authentic is selected by 39% of 21-30s, 44% of 31-40s, 50% of 41-50s, and 57% of 51-64s. Traditional is selected by 22% of 21-30s, 23% of 31-40s, 24% of 41-50s, and 28% of 51-64s. Bold is selected by 29% of 21-30s, 26% of 31-40s, 21% of 41-50s, and 16% of 51-64s

Younger groups still see benefit in these same values. But they also attach much more importance to a brand being bold – with 21-30s being almost twice as likely as 51-64s to express this. As with the concept of traditionalism, it's a small minority who overtly value boldness from a brand. And, of course, the definitions of all these terms are subjective; we might wonder if the BETA attraction to the concept of boldness represents a desire for confidence, for daring decisions, or for brands to push beyond old territory and take a stand on issues. It could be a mix of all three, but arguably the more principal factor here is that it's a term which suggests change - which won't always be easy - and it has a stronger attraction for BETAs than for other cohorts.

In some instances, then, it does appear that BETAs express stronger support for certain values than other generations. Across a wide range of today's issues – from gender equality and diversity, to the environment, community participation and sustainability – BETAs will express personal views which are more pronounced than those of their counterparts in other cohorts. This doesn't necessarily mean that their values are *different*; it's that the relative importance of these values or issues vs others has been rebalanced among the BETA contingent. And if they express these values more willingly in their personal lives, we can expect an impact (whether consciously or not) over their business decisions too.

Across a wide range of today's issues – from gender equality and diversity, to the environment, community participation and sustainability – BETAs will express personal views which are more pronounced than those of their counterparts in other cohorts.

The Pandemic's Impact on Values

Some had wondered whether the pandemic would disrupt the momentum that issues like climate change had been gathering. But just as BETAs (and other groups) have capacity to recognize the importance of an issue like the Black Lives Matter movement - and give it priority and focus despite the extraordinary circumstances of 2020 - so too do we see no material impact on the other important issues of the day. If anything, feelings about the climate and about behaving in more eco-conscious ways appear to have strengthened. In GWI's custom research on coronavirus attitudes and behaviors, we saw majorities in all age groups saying companies behaving sustainably and individuals reducing their personal carbon footprint had become *more* important to them since the pandemic, not less. BETAs are at the forefront of this, particularly in the 21-30 group.¹⁵

¹⁵ GWI Coronavirus Research, Wave 5, July 2020. <https://www.globalwebindex.com/coronavirus>.

In previous research on sustainability, GWI had typically seen people placing more responsibility on the shoulders of businesses than they were willing to accept personally. That appears to have shifted too, with the results from summer 2020 indicating a growing feeling of shared responsibility where businesses and individuals have a duty to act collectively. Despite this research taking place at a time of unprecedented and uniquely challenging circumstances, the pandemic hadn't dampened enthusiasm; it has accelerated it. And that's a stark reminder of the multi-faceted, complex nature of both consumers and business professionals; as businesses around the world pivoted and strained to respond to the pandemic, employees were developing additional expectations around existing prominent issues, and pushing others such as racial equality much more firmly up the agenda.

The results from summer 2020 indicate a growing feeling of shared responsibility, where businesses and individuals have a duty to act collectively.

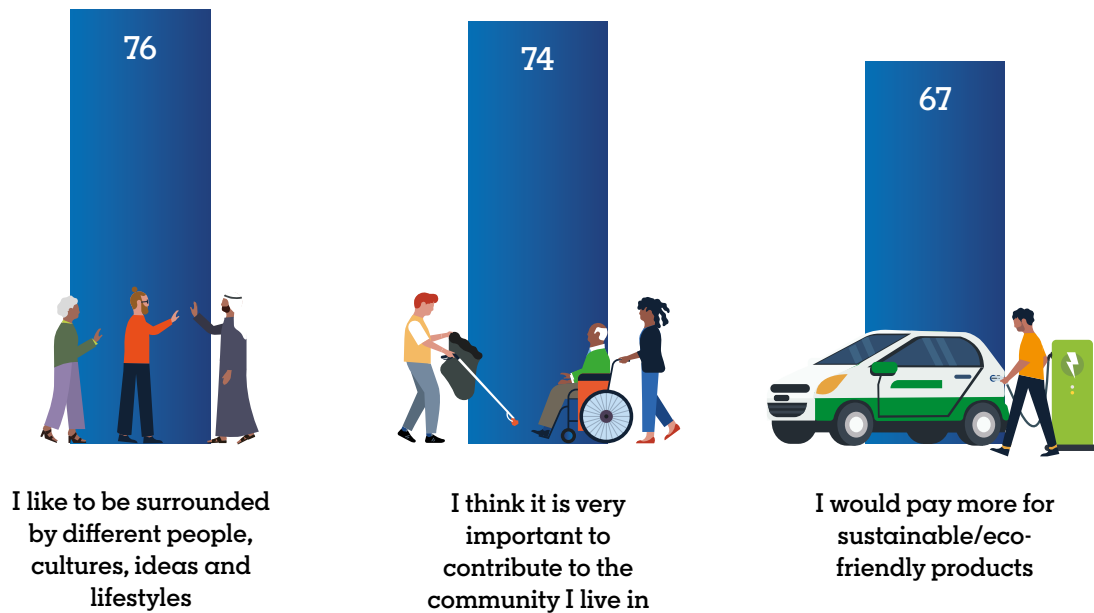
Expressed Sentiment vs Action Behaviors

Stated beliefs won't always be reflected in actual actions; it can often be easier to attach importance to something than to enact decisions which speak to this. While BETAs might report higher levels of support for sustainable choices, or for actions which enrich the community, the final decisions they make – whether in personal or professional contexts – will be influenced by a rich combination of competing concerns (not least the wider priorities and budgets of their businesses).¹⁶ Nevertheless, it's reasonable to expect that these personal beliefs are carried over into professional contexts, and that it's important for brands to recognize (and support / respond to) expressed intentions and sentiments just as much as actual behaviors. If vocalizing support for causes, and being seen to act in response, is a bigger driver for BETAs personally, it's logical that it would shape how they view their companies too.

¹⁶ When asked if they would "pay more for sustainable/eco-friendly products", 69% of 21-30s agreed, followed by 68% of 31-40s, 53% of 41-50s, and 44% of 51-64s. For the statement "I think it is very important to contribute to the community I live in", agreement ranged from 76% for 21-30s, 65% for 31-40s, 65% for 41-50s, and 61% for 51-64s. For the statement "I like to be surrounded by different people, cultures, ideas and lifestyles", the scores were 77% for 21-30s and 31-40s, 65% for 41-50s, and 61% for 51-64s.

Shared Values

BETAs care strongly about diversity, community contribution, and sustainability



% of Business Professionals aged 21-40 who agree with the above statements

Question: To what extent do you agree/disagree with these statements? Options: Strongly Agree, Somewhat Agree

Base: GWI Work 2020

Base: 17,692 Business Professionals aged 21-64 in 10 countries

Published in "Work in BETA: The Rising B2B Decision Makers" by The B2B Institute, 2020

BETAs might not always choose to, or be able to, act on their values, but the desire and intent is there. This group is most likely to say they want to feel more aligned with their company's vision, values, and operating principles; two-thirds express this, compared to half among business professionals aged 41-64. A complex range of factors will drive a sentiment like that, but brands demonstrating a greater commitment to issues or values which resonate with BETAs is one potential response.

This group is most likely to say they want to feel more aligned with their company's vision, values, and operating principles.

BETAs also express much stronger attachment to the idea of standing out from the crowd.¹⁷ This is a broad concept that can of course take many forms and can be motivated at least in part by a desire to accrue status. Even so, that BETAs are more than twice as likely as professionals aged 51-64 to see attraction in this suggests a level of comfort in choices that put them apart from the mainstream or which respond to the issues of the day. They are a generation of contrarians happy to push against the status quo. As we saw earlier, they will seek reassurance and confidence that it is the right choice to make; but that they are more open to this conceptually is important.

¹⁷ Responding to the statement "I like to stand out in a crowd", the agreement levels were 63% for 21-30s, 60% for 31-40s, 42% for 41-50s, and 27% for 51-64s.

Activist

Key Takeaways

1

There are some values or issues which appear to resonate more strongly with BETAs than with older groups (and vice versa). However, it's not that BETAs "care" more, it's that they have higher expectations about the action that should be taken in response to the values and issues that they deem to be important. Talk is not enough for BETAs; meaningful change and results are expected, even if cultural nuances will dictate the forms in which this plays out in different countries.

2

In the current pandemic-influenced climate where job security is under threat and uncertainty levels are high, we might legitimately question how much BETAs (or any other cohort) will push the boundaries. But as we emerge from the pandemic, BETAs will place more scrutiny on their companies in terms of how they live the values that are important to them. And with BETAs representing the biggest block of hardware and software buyers, the values which they hold important will exert a bigger influence on how they select vendors.

3

BETAs place comparable burdens on themselves as on companies to take meaningful action. They are driven by a belief that they can, and should, make a difference.

Recommendations

Blurred Boundaries

More than for any group, boundaries between the personal and professional have dissolved for BETAs.

Communicate in ways that cut through the noise. Speak to the BETAs in a bold, emotion-driven way with a clear brand voice, and invest heavily in social media. On LinkedIn, we saw a 55% increase in conversations among connections, and a 60% increase in content creation, from March 2019 to March 2020.¹⁸

Distribute content through social media and other easily consumable digital formats. Invest in modern selling over mobile-friendly interfaces like LinkedIn and be mindful about timing.

Guard against burnout. Invest in mental and physical health initiatives and incorporate respect for time and flexibility into the company culture.

Evolving

The BETA identity is defined by professional status, personal brand, and continuous self-evolution. BETAs are more risk-averse than they might realize.

Celebrate client wins publicly. Create opportunities to help your clients grow and shine. Thought leadership delivered as online learning will resonate. Invest in modern selling – actively comment on client posts, celebrate milestones, and write recommendations. Nearly 40% of BETAs now follow work contacts on social media.

Mitigate risk by investing in your brand. The BETAs are status-seeking but risk-averse. Invest in brand to unlock fame effects, and high-profile case studies to unlock social proof effects. Offer free trials whenever possible.

Recognize and nurture star talent. Invest in **LinkedIn Learning** and programs like **LinkedIn's Rock Your Profile** to empower your employees to pursue online learning and become experts at showcasing their new skills. Executives should seize on the unique opportunity to influence BETAs as professional role models on social media. 37.6% of young BETAs and 31.3% of older BETAs follow their professional heroes on social media, versus just 12.1% of our 51+ aged group.

1

2

¹⁸ <https://business.linkedin.com/marketing-solutions/blog/linkedin-b2b-marketing/2020/planning-for-a-strong-recovery--here-s-your-six-step-roadmap>

3

Tech Native

Technology has more influence than anything else on the BETA mindset.

Ensure a seamless buyer's journey. BETAs want a seamless, frictionless, and integrated experience. Simplify your buyer journey and customer experience. Make the "shopping" experience more like an e-commerce experience by incorporating visible pricing and quick credit card payments wherever possible.

Show up mobile-first and video-heavy. Innovate ways to reach customers where they are and earn their attention. **LinkedIn Stories** are an exciting new way to reach BETAs as professionals in a format they are familiar with and responsive to as consumers.

Use technology to gather intelligence. Invest in solutions like **LinkedIn Sales Navigator** to gather intelligence on your potential clients and build relationships. 92% of buyers say they're more likely to consider a brand when a sales rep "shares content applicable to my role in the buying process."¹⁹

4

Activist

The BETAs demand brands take action on social justice issues.

Develop a clear brand purpose and invest in your community. Have a clear vision and focus on impact and action in your community. Use your brand values as a north star for your social impact agenda. Research from Edelman shows that roughly 85% of people want brands to be reliable news sources, educators, and support systems to their communities.²⁰

Take action. Move beyond the performative to concrete action. 44.9% of our 21 to 30-year-old professional group, versus 33.7% of our 51-year-old group, felt that their companies should audit the diversity in their mix of suppliers.

Earn trust. Act in the buyer's interest throughout their journey by investing in the long term, even if it means short-term sacrifices. Share your thought leadership, engage with theirs, and form new relationships. Be conscious of how you show up. 35% of decision makers rank trust as the top contributor in closing a deal—above ROI or price.²¹

¹⁹ <https://business.linkedin.com/marketing-solutions/blog/sales-and-marketing/2020/7-insights-for-marketers-from-linkedin-s-new-state-of-sales-repo>

²⁰ <https://www.edelman.com/research/covid-19-brand-trust-report>

²¹ <https://www.linkedin.com/business/sales/blog/b2b-sales/a-letter-to-the-sales-industry-its-time-to-put-the-buyer-first>

Global Snapshot

Broadly, the BETA movement is particularly evident in emerging markets like Brazil and India - with their young, digital ultra-native populations. It is also strong in countries such as the U.S. and UK, which host many new tech companies, tools and platforms that have disrupted the workplace and been adopted en masse in organizations. In Japan – where the standards around seniority and office culture remain more formal – as well as in some Western European markets like Germany and France, the trends are less pronounced.

Here's a global snapshot of how the BETAs vary by key markets.



Australia

BETAs will make up around 75% of Australia's professional workforce by 2025, according to the Australian Board of Statistics.²² We found Australia's BETAs were more than accustomed to work disruption. Of our 10 countries, Australian BETAs were least likely to describe their day-to-day work as consistent and predictable (only 37% do). They are quite conservative about tech experimentation though – only 38%, compared with 56% globally said they thought automation will have a positive impact on their job. They favored email over other channels. They also favor convenience with 42% saying they prioritized ease of installation and implementation as the most important factor when purchasing new tech products.



Brazil

Brazil has a young, mobile-first, tech hungry generation of BETAs. According to GWI's Q2 2020 data among digital 16-64s, 99% of Brazilian millennials have a smartphone, and spend an average of 6 hours per day on their smartphones. But this is blighted by economic headwinds and the global pandemic. According to statistics agency IBGE, less than 50% of working age Brazilians are now employed.²³ Among our educated professional Brazilian sample, we found a strong appetite for BETA life. Brazil had the highest number of BETAs of any market confirm that they were most likely to work in remote locations such as coffee shops (16%). And many work alone – just 41% said they work with different teams each day. They are highly social and blurred in their B2B habits – 49% said they used Instagram when researching business products. Meanwhile, they turned out to be one of the most frequent reviewers of business vendors. 49% said they reviewed suppliers frequently.

²² <https://media.haworth.com/asset/89200/Millennial%20Series:%20Raising%20the%20bar:%20Australian%20Millennials%20in%20the%20Workplace#:~:text=Millennials%20will%20make%20up%20the,the%20way%20companies%20do%20business>

²³ <https://www.reuters.com/article/us-brazil-economy-employment/brazil-unemployment-rate-12-9-less-than-half-working-age-population-in-work-idUSKBN241284>

France

French Millennials make up 40% of France's population and have been working in a more conservative professional environment.²⁴ Only 21% said they were now permitted to work remotely. However, they typically work traditional hours – only 5% said they often worked late. France has emerged as a European tech-hub with a swathe of innovative tech start-ups attracting record-breaking financial backing in recent years,²⁵ so, we were surprised that our French BETAs were not optimistic about things like automation in a B2B context – just 36% thought it would be good for their sector. When it comes to purchases of B2B tech and software, they were most motivated by value (22% said this was the single most important factor). Overwhelmingly, 72% of French BETAs said they were open-minded. They are also increasingly concerned about their tech habits — 44% said they worry they spend too much time on their Smartphone.

Germany

German BETAs are highly educated and pragmatic workers. According to a 2019 Deloitte study, 34% of German millennials are engaged in additional vocational qualifications.²⁶ They are also becoming the dominant management group in companies. Our data shows their career environment is remarkably progressive: 38% said flexible working hours are permitted – the highest in any of our sample markets. But they are also keen to maintain boundaries in an ever-blurring Covid-19 environment. Only 11% said they check emails and messages outside work hours. They are forging ahead with business plans, even amid the pandemic – we found they were least likely to have delayed purchases due to the pandemic. Meanwhile, when it comes to tech/digital platforms and the business environment, they read quite conservative: only 23% said they used social media to keep up with their industry, and a remarkable 51% said they still used landlines in work.

India

While the term 'millennial' in its western sense might translate differently in India, as it also does in China, there's no doubt India's millennial-age workers are a dominant force in B2B and are showing many pronounced B2B attitudes. At 426 million, millennials represent 34% of India's population and 46% of its workforce, according to Morgan Stanley.²⁷ Our Indian BETAs show a traditional but highly industrious approach to work – 39% described themselves as traditional. Yet use of tech is creeping in and blurring the lines between work and home: 89% said they check emails and messages outside work hours, and 24% said existing personal use of a product was a reason for considering it for work. They also follow partners closely: 89% said they communicate with external B2B partners and contractors on a weekly basis.

²⁴ <https://www.statista.com/topics/6829/millennials-in-france/>

²⁵ <https://siliconcanals.com/news/french-tech-startups-funding/>

²⁶ <https://www2.deloitte.com/content/dam/Deloitte/de/Documents/Innovation/deutscher-report-globale-millennial-survey-2019.pdf>

²⁷ <https://www.morganstanley.com/ideas/india-millennials-growth-sectors#:~:text=India%20is%20on%20track%20to,and%2046%25%20of%20its%20workforce.>

● Japan

Japan's BETAs came of age in the wake of the 2008 global recession and economic stagnation that followed the collapse of the country's bubble economy in the 1990s. While reports suggest a new wave of optimism and exuberance is simmering among this group as consumers, they are the least pronounced cohort in BETA attributes in the B2B context.²⁸ 53% said they were interested in online learning and self-improvement. Their home/work lives seem less blurred – they were most likely to use company-owned devices rather than their own for work. Least likely to use services for both personal and professional purposes – just 17% said they do this. Interestingly there was a strong trend towards use of tablets in work with 35% saying they use them professionally. With the specter of a global pandemic, many were focused on remote working capabilities when purchasing B2B software and tech — 89% attached importance to this. And they were increasingly concerned about privacy. 58% said they prefer being anonymous online.

Singapore

Singapore BETAs represent 22 percent of Singapore's population and were found to be one of the most pronounced BETA groups. They are already blurring work and home boundaries — 78% said they use services for both professional and personal capacities. They were some of the most enthusiastic about flexible working — 58% said they were even likely to want this following the pandemic. They are mobile centric — our Singaporean BETAs were least likely to still be using a fixed line-telephone, though 77% favor laptops. When it came to the broader B2B outlook, they were skeptical of higher, (presumably older) management decisions – when asked about the biggest challenges their company or team was facing, 20% identified “poor management decisions” as one of the biggest challenges, with 8% saying this was the single biggest challenge. But they were also benefiting from opportunities to progress. 19% said they now benefit from personal/professional development funds in their job.

Spain

A key theme in Spain is economic instability — half of all Spanish job losses since the start of the outbreak have affected under 35-year-old Spanish BETAs, according to data released by Spain's National Statistics Institute. In April 2020, unemployment rose 13.1% among Spain's 25-29-year-old population making them the hardest hit demographic.²⁹ As such, it's not surprising the core attributes of flexibility, self-improvement and adaptability came out strongly in our BETA sample. 69% of Spanish BETAs said challenging themselves was important to them. 77% are already hotdesking, and 34% are using co-working spaces. They are open minded: 75% are open to new vendors. And they are focused on succeeding — we found they were most likely to cite ‘ability to scale rapidly’ as the biggest challenge facing their company (29% said this, the highest of any BETA group globally, with 9% saying it's the single biggest challenge).

²⁸ <https://asia.nikkei.com/Economy/Japan-s-optimistic-millennials-shed-frugal-habits-and-lift-spending>

²⁹ https://english.elpais.com/economy_and_business/2020-05-18/more-unemployment-and-lower-wages-coronavirus-crisis-dimming-the-prospects-of-young-people-in-spain.html



UK

British BETAs make up around 25% of the population and 50% of the workforce, according to The Institute of Leadership and Management.³⁰ The UK continues to grapple with the pandemic, so unsurprisingly, British BETAs were most likely to cite budget cuts as the biggest challenge facing their company (25% said this, with 11% saying it's the single biggest challenge). That said, British BETAs are evaluating vendors during specific periods, rather than frequently. Significantly, 'tools that better enabled collaborative working' were one of the most important factors when purchasing new tech and software products or services — 93% say this is important, and 5% cited it as the single most important factor. This will likely continue given that many are now working at home. 71% said their company now permits remote working.



USA

American BETAs, which are the largest living adult generation and are entering their peak earning years, represent a third of the US workforce, according to Pew Research Center analysis of U.S. Census Bureau data.³¹ They have fled the country's eye-wateringly expensive business capitals — such as New York, Los Angeles and San Francisco — during the pandemic. If they are not part of the some 4.8 million newly unemployed, they're turning to remote working. Big Tech companies from Google to Facebook have made high profile announcements that remote working would continue until 2021. Others have followed. Dropbox has announced that work from home will be introduced permanently, suggesting that remote working tools will become even more important to US BETAs. Our American BETAs display a strong activist streak: 53% said helping others before themselves is important to them, and 41% support ensuring diversity in their mix of suppliers. This suggests that they will favor vendors who take similarly responsible approaches to business. They grapple with entrenched company buying patterns — 10% felt strongly that their company still does things the way they always have. Meanwhile, they said their biggest challenge at work was morale and staff retention. 25% said this as a challenge, with 9% picking it as the single biggest challenge.

³⁰ <https://www.institutelm.com/resourceLibrary/workforce-2020-managing-millennials.html>

³¹ <https://www.pewresearch.org/fact-tank/2020/04/28/millennials-overtake-baby-boomers-as-americas-largest-generation/>

Methodology & Sample

GWl's surveys

The data used in this white paper comes from GWl, which runs the world's largest study of the digital consumer. GWl interviews over 700,000 representative internet users aged 16-64 annually; these respondents from over 45 countries are asked a wide range of questions about their digital lives and lifestyles as part of GWl's Core survey.

Each year, GWl then identifies business professionals who have participated in this research and invites them to take part in its Work survey. These respondents from Australia, Brazil, France, Germany, India, Japan, Spain, Singapore, the UK and the U.S. complete an online questionnaire that covers their professional lives, the companies they work for, and their relationship with technology in a work context.

The re-contact methodology GWl employs allows them to connect their work-related responses with those they gave in the GWl Core survey. This provides a 360-view of their personal and work lives as both consumers and business professionals.

GWl Work was used for most data presented in this report. In places, it is supplemented by answers given in GWl Core, or from additional custom research undertaken by GWl to understand attitudes and behaviors in relation to the pandemic.

Sample Sizes and Definitions

The annual GWl Work sample sizes are as follows:

	Australia	1,250
	Brazil	1,000
	France	1,250
	Germany	1,250
	India	2,000
	Japan	1,000
	Singapore	1,000
	Spain	1,250
	UK	3,000
	U.S.	4,000

GWI Work was launched in 2019 with a global sample size of 17,000 per wave. This report draws on the results of waves 1 and 2, giving a combined sample size of over 34,000. This means questions can be trended between years, providing a sense of which areas have been affected by the pandemic, vs. which were pre-existing trends.

Business professionals from any sector, any company size, and of any seniority, can take part in GWI Work. The data shows a good spread across 40 named sectors, with concentrations in IT/Technology, Education, Manufacturing, Healthcare, Retail and Financial Services.

All business professionals who participate in the research are defined as “Knowledge Workers” – that is, employed individuals who hold an office position and/or “work with data, analyze information or think creatively” in a typical work week.

The sample shows a balance from SMEs through to Large Enterprise businesses; has equal representation from companies which have operated for less than 5 years through to those which are more than 50 years old; and includes a diverse mix of individuals in terms of seniority, from office workers and skilled manual workers through to Senior and Executive management.

Methodology

GWI Work is an online survey which uses a range of likert scale, dichotomous, multiple-choice and open-ended questions.

Participants completed the survey in their local language, and questions were localized to each country to ensure relevancy. To produce the highest-quality and most representative data, the survey was broken into several themed “blocks”, which were then randomized to remove any bias around the question order. Routing methods, which direct respondents to relevant survey questions, were applied to ensure that all respondents were presented with questions pertaining to their workplace experience.

After fieldwork was completed, GWI vetted all responses across a series of metrics. This included analysis of survey completion time; checks for patterned answers; and the use of logic traps, which screen for contradictory answers. Between 5% and 10% of the surveys in each market were removed during these checks. Within the final sample, respondents were assigned a weight based on their representativeness of surveyed markets. Weights considered age, gender and education profile and were used to estimate how many real-world people a data point represents.

The B²B Institute

About the B2B Institute

The B2B Institute is a think tank funded by LinkedIn that researches the future of B2B marketing and decision making. We partner with leading experts in academia and industry to study the impact of B2B brand building on marketing, product, sales, corporate communications, and talent development.

Our mission is to identify the smartest minds in the B2B sector and collaborate with those experts to investigate how marketing can create more value. Our vision is to transform the B2B category by introducing entirely new strategies for growth that reach beyond tactical short-term thinking and across organizational silos. We believe that strong relationships are the foundation of growth for all business, and we want to help all types of companies create and strengthen those relationships.

While we are funded by LinkedIn, The B2B Institute is an open forum for dialogue from diverse perspectives. We seek out experimental ideas that are future-focused and push the boundaries of conventional wisdom about marketing and the relationship between businesses.



About GWI

GWI (formally GlobalWebIndex) is a target audience company that provides consumer insight across 46 countries to the world's leading brands, communication agencies and media organizations.

The company runs a global survey representing more than 2 billion connected consumers, which offers up over 40,000 data points on the behaviors and perceptions of internet users around the world. Using the subscription-based platform, clients including Twitter, Google, Spotify, WPP, IPG and Omnicom Group can gather in-depth insights into audience behaviors, attitudes and interests through a combination of survey data and analytics.

Among a range of leading data products available alongside its flagship survey is its B2B data set, GWI Work, which analyzes professionals across 10 global markets, and its TV reach and frequency solution, which enables advertisers to target previously untapped audiences.

Its newest data set launched in July 2020, GWI USA, responded to the increasing demand for more relevant and timely insight into the modern American consumer. Representing over 240 million people across all 50 states, the study tracks new and emerging trends not typically covered by traditional market research providers, including key questions around cultural identity, race, and ethnicity.

LIGHT YEARS

About Light Years

Light Years is a futures, research and brand strategy practice, founded by futurist Lucie Greene with the mission of advancing trend forecasting and creative development for the next generation of brands.

For more, follow Light Years at [ThisIsLightYears.com](https://thisislightyears.com)

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Please contact b2binstitute@linkedin.com for further information

