



## Executive Summary

Here are the results of our 2019 *Chemical Processing* Media Consumption Study. The following results detail what media our audience consume, how they consume media, why they consume media and what actions they take after they consume media.

The Media Consumption Study continues to mirror what we've been saying about print and digital media all along... bottom line, it's most effective to integrate your marketing campaign by utilizing both print and digital media because your customers and prospects (our audience) are consuming media and engaging with advertisers in increasing numbers in both print, digital and lead generation platforms... fishing where the fish are across all media platforms. **That's as important and powerful as ever!**

There are a few highlights from the study that are abundantly clear and bear repeating here:

### Overall Media Consumption Trends

1. Media consumption is on the rise again - 40% of survey respondents report that their consumption of industry related media increased over the past twelve months... with chemical industry magazines accounting for the greatest percentage of that increase.
2. Our audience continues to consume print and digital media for different purposes – print media to identify new ideas, new solutions and the development of “short lists” of potential vendors and digital media for research and due diligence.

### Print Media Consumption

1. Print media is far from being dead. In fact, print magazines continue to be cited (for the sixth consecutive year) as the most important source to find out about new products, new vendors and new technologies.
2. Our print audience are engaged with a visible vendor community... 62% of our audience indicate that visiting an advertiser's website is an action they take after reading the magazine; 61% state that they research additional materials such as white papers, videos, webinars, eBooks, etc. and 43% state that they contact a vendor/advertiser to learn more about a specific product/solution.

### Digital Media Consumption

1. Our digital readers are very engaged with thought leading vendors and their content... increasing to 81% of our audience as likely/very likely to register for access to educational content; webinars (78%), white papers (86%), case histories (84%), educational videos (83%), and eBooks (76%).
2. An increase to 83% of our audience are likely/very likely to contact a vendor that has produced relevant/authoritative content, such as webinars, videos, white papers, case histories and eBooks.

Please enjoy reading the details of the *Chemical Processing* Media Consumption Study. It's definitely worth your time to not only understand what, why and how our audience is consuming media and the actions they take after consuming media, but also to use when putting your marketing plans together.

# Media Consumption Study Chemical Processing Professionals

Conducted for:

*Chemical Processing*

Conducted by

**Preston/Rogers** Associates, Inc.  
Market Research & Media Consulting

May, 2019

**Proprietary & Confidential**

## Executive Summary

In March of 2019, *Chemical Processing* and Preston/Rogers Associates, Inc. undertook the development and execution of a comprehensive research study to solicit and analyze media consumption of print & digital information from chemical processing professionals. Participants were selected on an Nth name (random start) basis from *Chemical Processing's* audience.

40% of the chemical processing professionals surveyed report that their consumption of work-related media has increased during the past 12 months. Chemical industry magazines, chemical industry websites and chemical industry E-Newsletters most often accounted for this increase.

Chemical processing professionals are regular readers of industry magazines. 70% are spending an hour or more each week reading industry trade magazines, up from 62% in 2017. Overall, they spend an average of 2.3 hours per week reading work-related magazines.

Respondents read industry magazines regularly to keep current on industry news and technology, to look for new ideas and to learn about best practices in the chemical industry. Nearly all respondents (99%) take action as a result of reading an article or ad in a chemical industry magazine. Visiting an advertiser's website, researching additional materials such as white papers, webinars, etc. and using ideas found in articles are the actions taken most often.

Digital resources are widely used in this market. 88% of chemical processing professionals use one or more digital tools and services to help them do their jobs. The most popular tools are webinars and videos. In addition, online networking and social media for business purposes is also prominent, with 87% reporting that they use various networking tools and services. Google and LinkedIn are the most popular. Digital versions of chemical industry magazines are also popular, with 67% reporting they receive digital editions - 49% prefer to receive the digital editions only and 18% prefer to receive both the digital and print editions.

Interest in free online educational content is also high with more than eight out of ten reporting they would be very likely/likely to register for free access to white papers, case studies and educational videos. In addition, about three-fourths are very likely/likely to register for webinars and eBooks. Also, 83% are very likely/likely to contact a vendor that has produced relevant and authoritative content.

Overall, chemical processing professionals use search engines, E-Newsletters, supplier websites, chemical industry websites and chemical industry magazines most often for work-related information. Search engines are used on a daily basis by 78%, and 96% use them at least weekly. E-Newsletters are used at least weekly by 52%, supplier websites are used at least weekly by 48%, chemical industry websites are used at least weekly by 46% and 44% use chemical industry magazines at least weekly.

The information resource utilized most often varies by task. Chemical industry magazines are the most important source cited to stay current with technologies, products and vendors. Search engines are the most important source for obtaining information or specifications for products as industry professionals begin a new project.

In summary, chemical processing professionals' strong desire to keep current with the chemical processing industry is a large motivator of print & digital media consumption which continues to grow year to year.

## **Introduction**

Today, more than ever, business professionals have a variety of media alternatives from which to choose. This study was undertaken to better understand the media consumption habits of chemical processing professionals and the sources they use to get information they need to make decisions related to vendor selection.

## **Research Objectives:**

- Measure changes in media consumption during the past 12 months.
- Measure how chemical industry-related magazines are read, how much time is spent per week reading industry magazines, key reasons for reading and actions taken.
- Measure usage of digital tools and services as well as online networking and social media sources.
- Identify the most important sources for staying current with technologies, products and services and obtaining information or specifications for products.

## **Survey Overview & Methodology**

The random sample was developed from *Chemical Processing's* VAC audited audience. An online survey invitation was e-mailed to a total of 28,257 individuals on March 11, 2019. Two additional reminder emails were sent to non-respondents between March 21<sup>st</sup> and April 16<sup>th</sup>. Participation in a drawing for a \$100 Apple gift card, a \$100 Amazon gift card and 3 American Express gift cards was offered as an incentive to reply. A total of 409 chemical processing professionals responded to the survey. The margin of error for a sample this size is +/- 4.8% at the 95% confidence level.

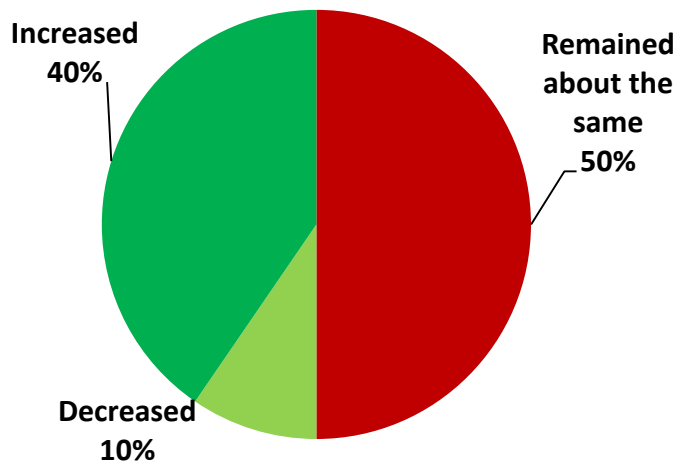
The questionnaire was developed jointly by *Chemical Processing* and Preston/Rogers Associates, Inc. Preston/Rogers was responsible for data tabulations, analysis and report development. The data was analyzed by age of respondent and heavy/light readers.

**40% of the chemical processing professionals say their consumption of work-related media has increased over the past 12 months. 50% report that media consumption remains about the same. Chemical industry magazines (59%) chemical industry websites (57%) and industry E-Newsletters (56%) most often accounted for the increase in media consumption.**

Has your consumption of chemical industry-related media (trade magazines, websites E-Newsletters, etc.) increased or decreased during the past 12 months?

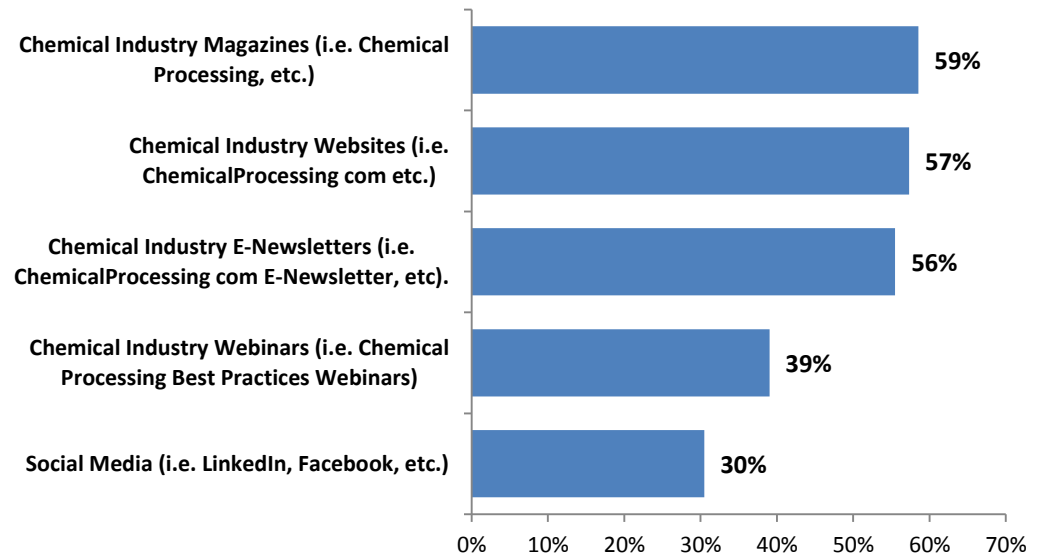
If your consumption of chemical industry-related media has increased, please let us know which forms of media have accounted for that increase.

### Change in Media Consumption



Base: 409 total respondents

### Media Accounting for Increase



Base: 164 respondents who have INCREASED media consumption during the past 12 months and who answered the question.

**Respondents 45 years of age and younger are more likely than older respondents to say that chemical industry-related media consumption has increased during the past 12 months.**

**Respondents over 55 are more likely to report that industry magazines account for their increase in media consumption. Increase in use of industry E-Newsletters is more prevalent among those over 45.**

**Has your consumption of chemical industry-related media (trade magazines, websites E-Newsletters, etc.) increased or decreased during the past 12 months?**

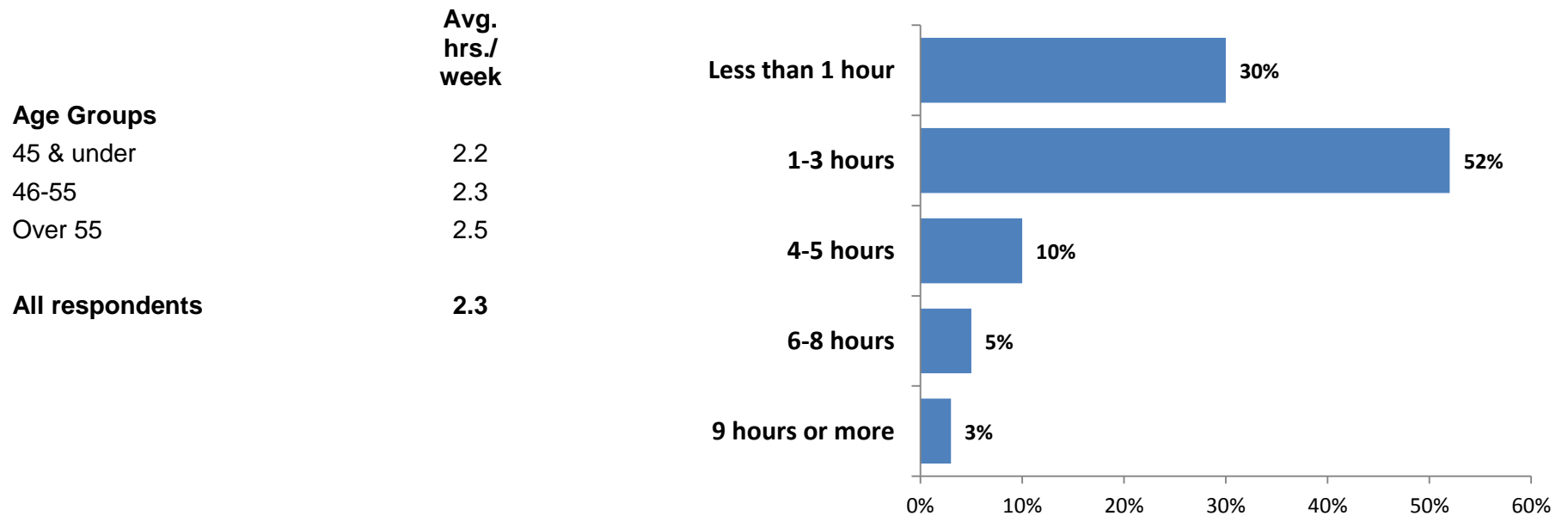
**If your consumption of chemical industry-related media has increased, please let us know which forms of media have accounted for that increase.**

	<b>Total</b>	<b>45 and under</b>	<b>46-55</b>	<b>Over 55</b>
	-----	-----	-----	-----
Base: Total respondents	409	112	80	177
Industry-related media consumption has INCREASED	40%	<b>56%</b>	36%	34%
<hr/>				
Base: Respondents who have INCREASED media consumption and who answered the question	164	62	29	60
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Chemical Industry Magazines (i.e. Chemical Processing, etc.)	59%	56%	55%	<b>68%</b>
Chemical Industry E-Newsletters (i.e. CP Morning Briefing and CP Weekly, etc.)	56%	50%	<b>62%</b>	<b>60%</b>
Chemical Industry Websites (i.e. ChemicalProcessing.com etc.)	57%	61%	52%	58%
Chemical Industry Webinars (i.e. Chemical Processing Best Practices and Process Safety Series)	39%	42%	45%	37%
Social Media (i.e. LinkedIn, Facebook, etc.)	31%	37%	31%	23%

**70% of chemical processing professionals spend 1 hour per week or more reading industry trade magazines, up from 62% in 2017. Respondents over 55 years of age spend the most time reading industry trade magazines, an average of 2.5 hours per week.**

About how many hours per week do you typically spend reading chemical industry trade magazines?

### Time Spent Reading Chemical Industry Magazines

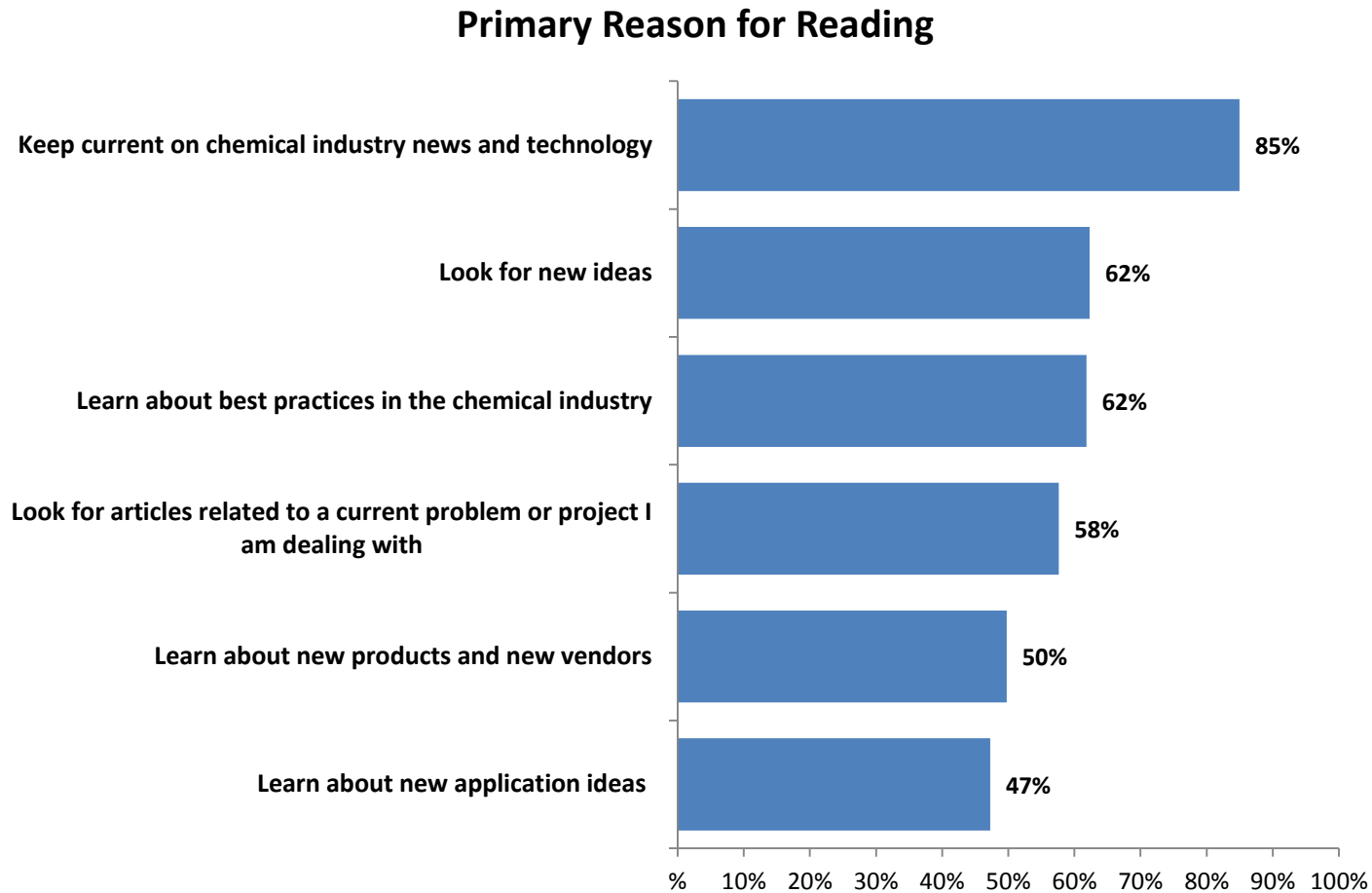


Age Groups	Avg. hrs./ week
45 & under	2.2
46-55	2.3
Over 55	2.5
<b>All respondents</b>	<b>2.3</b>

Base: 407 respondents who answered the question

**Chemical processing professionals say the primary reasons they read professional magazines are to keep current on industry news and technology, to look for new ideas and to learn about best practices in the chemical industry.**

Please indicate the primary reasons you read your favorite professional magazines.



Base: 406 respondents who answered the question



**Reasons for reading professional magazines remain consistent except where chemical processing professionals over 45 years of age are more likely than their younger counterparts to say they read professional magazines to look for new ideas.**

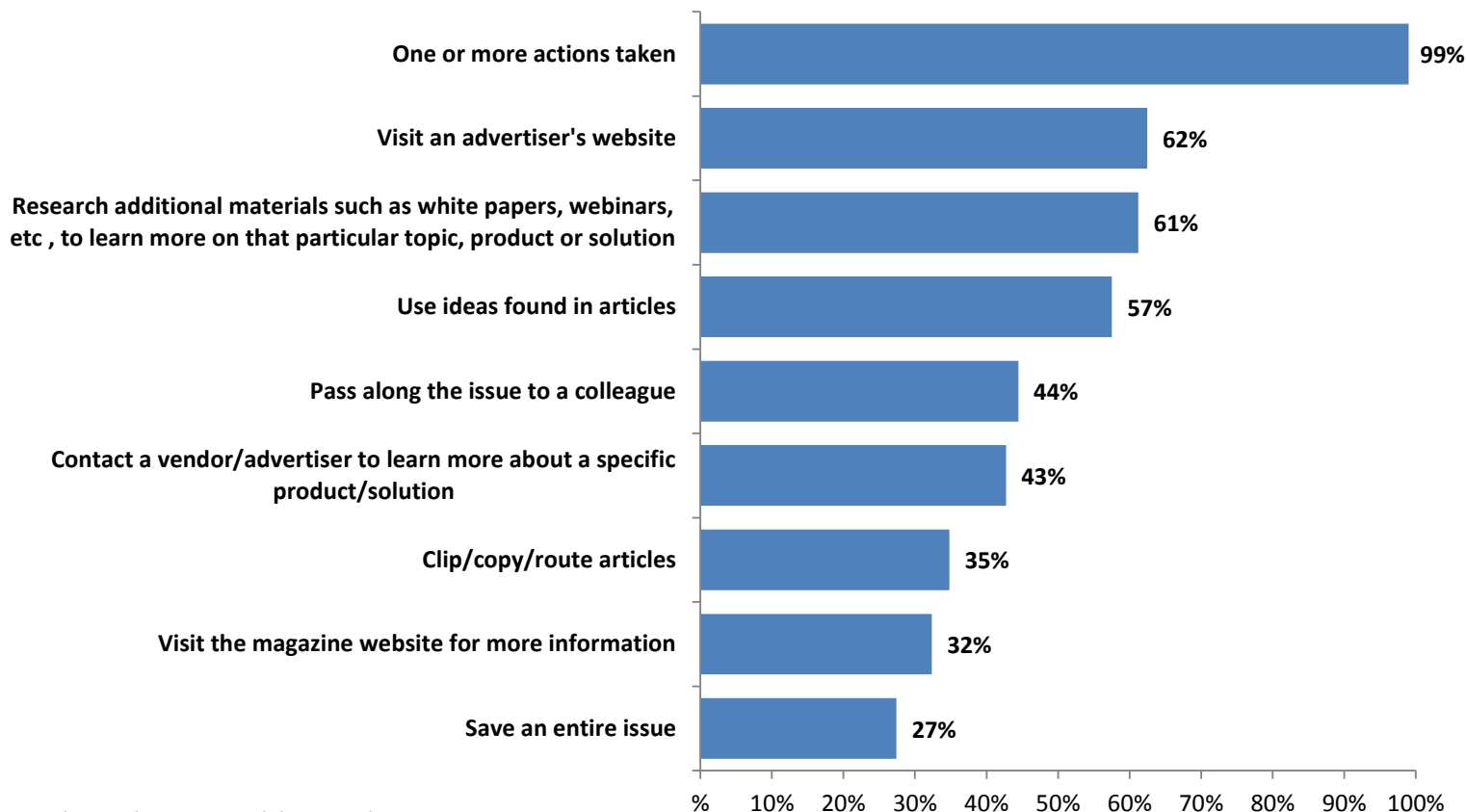
Please indicate the primary reasons you read your favorite professional magazines.

	<b>Total</b>	<b>45 &amp; under</b>	<b>46-55</b>	<b>Over 55</b>
	-----	-----	-----	-----
Base: Total answering	406	112	80	176
Keep current on chemical industry news and technology	85%	83%	93%	82%
Look for new ideas	62%	53%	<b>71%</b>	<b>66%</b>
Learn about best practices in the chemical industry	62%	57%	69%	63%
Look for articles related to a current problem or project I am dealing with	58%	61%	63%	57%
Learn about new products and new vendors	50%	49%	50%	52%
Learn about new application ideas	47%	53%	49%	47%

Nearly all respondents (99%) take some type of action as a result of reading an ad or article in a chemical industry magazine. Visit an advertiser's website, research additional materials such as white papers, webinars, etc. and use ideas found in articles are the actions taken most often, each mentioned by 6 out of 10 respondents. In addition, more than 4 out of 10 pass along their issue to a colleague or contact a vendor/advertiser to learn more about a specific product/solution.

Please indicate what actions you may take as a result of reading an article or ad in a chemical industry magazine.

### Actions Taken



Base: 408 respondents who answered the question

**Industry professionals who spend 1 hour or more per week reading chemical industry-related magazines are more likely to take action as a result of reading an article or ad in a work-related magazine.**

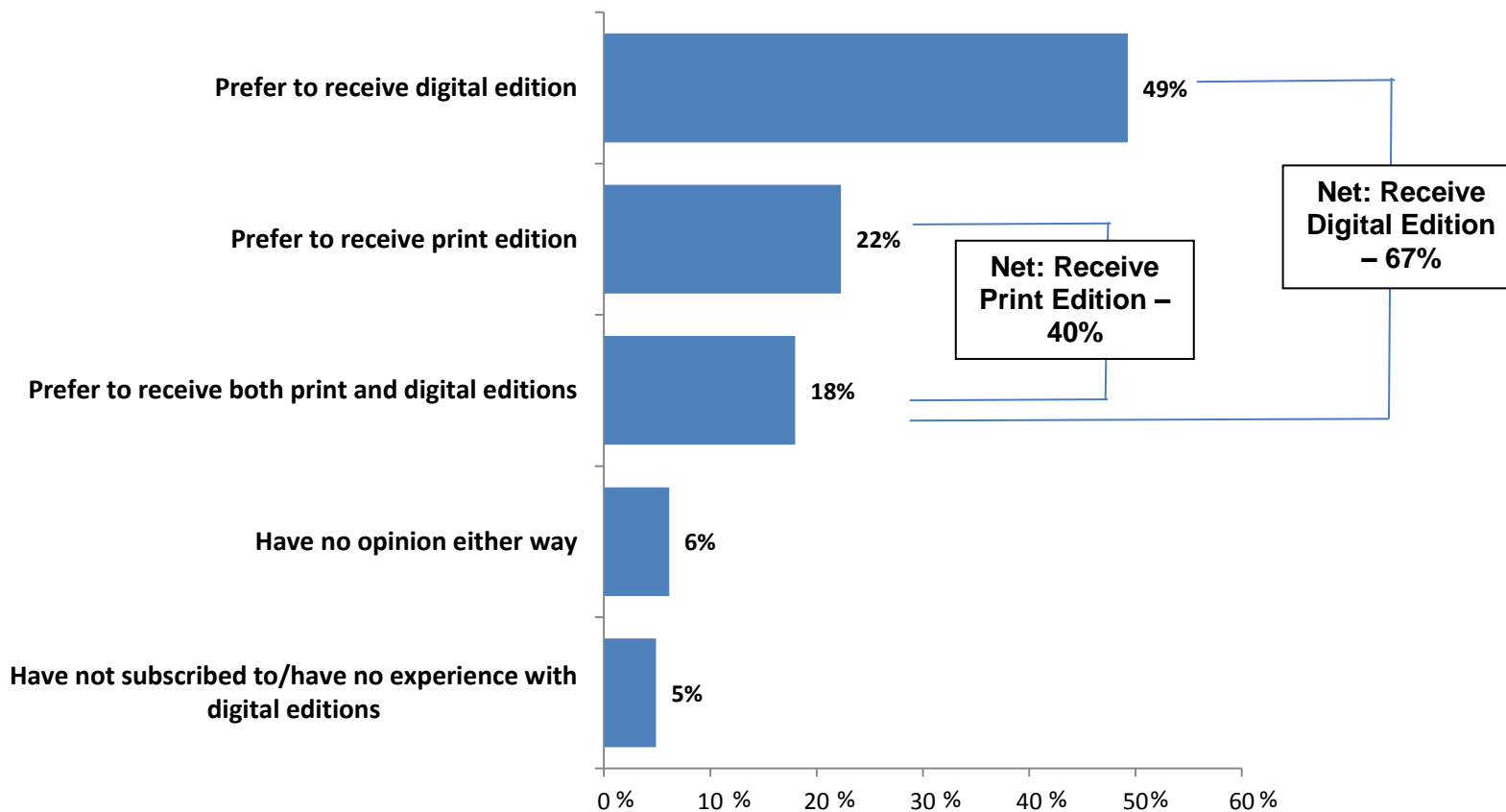
Please indicate what actions you may take as a result of reading an article or ad in a work-related magazine.

	Hrs. per week reading chemical industry-related trade magazines			
	Total	Less than 1 hr.	1 – 3 hrs.	4 hrs. or more
Base: Total answering	408	122	212	73
<u>One or more actions taken (net)</u>	<u>99%</u>	<u>98%</u>	<u>100%</u>	<u>100%</u>
Visit an advertiser's website	62%	60%	62%	<b>70%</b>
Research additional materials such as white papers, webinars, etc. to learn more on that particular topic, product or solution	61%	50%	64%	<b>74%</b>
Use ideas found in articles	57%	52%	58%	66%
Pass along the issue to a colleague	44%	32%	<b>50%</b>	<b>49%</b>
Contact a vendor/advertiser to learn more about a specific product/solution	43%	38%	42%	<b>55%</b>
Clip/copy/route articles	35%	24%	37%	<b>45%</b>
Visit the magazine website for more information	32%	19%	34%	<b>52%</b>
Save an entire issue	27%	17%	29%	<b>40%</b>

Overall, 67% of chemical processing professionals receive the digital editions of the industry magazines they read regularly and 40% receive the print editions. 49% prefer to receive the digital only, 22% prefer to receive the print edition only and 18% prefer their magazines in both print and digital formats.

Which of the following statements best reflects your experience with digital editions of magazines you read regularly?

### Magazine Format Preference



Base: 408 respondents who answered the question

**Respondents prefer to receive the digital edition of the chemical industry-related magazines they read regardless of age.**

**Which of the following statements best reflects your experience with digital editions of the chemical industry-related magazines you read regularly?**

	<b>Total</b>	<b>45 &amp; under</b>	<b>46-55</b>	<b>Over 55</b>
	-----	-----	-----	-----
Base: Total answering	408	112	80	177
Prefer to receive digital edition	49%	54%	50%	46%
Prefer to receive print edition	22%	17%	26%	26%
Prefer to receive both print and digital editions	18%	18%	19%	17%
Have no opinion either way	6%	7%	3%	6%
Have not subscribed to/have no experience with digital editions	5%	4%	2%	5%

**Search engines, E-Newsletters, supplier websites, chemical industry websites and chemical industry magazines are the resources used most often by industry professionals.**

**Search engines are used on a daily basis by 78%, and 96% use them at least weekly. E-Newsletters are used at least weekly by 52%, supplier websites are used at least weekly by 48%, chemical industry websites are used at least weekly by 46% and 44% use chemical industry magazines at least weekly.**

About how often do you use the following resources for work?

	Search Engines (Google, Yahoo)	Chemical Industry Magazines	E-Newsletters	Supplier Websites	Chemical Industry Websites	Social Media	Distributor Websites
Daily	78%	8%	18%	9%	9%	16%	6%
Weekly	18%	36%	34%	39%	37%	17%	17%
Monthly	2%	27%	18%	25%	26%	6%	24%
Less often	2%	16%	19%	19%	21%	22%	35%
Never	-	6%	6%	2%	2%	31%	7%

Base: 378 respondents who answered the question

**Chemical industry professionals who spend more time reading work-related trade magazines use nearly all information resources more frequently than those who spend less time.**

About how often do you use the following resources for work?

Use at least weekly	Total	Hrs. per week reading chemical industry-related trade magazines		
		Less than 1 hr.	1 – 3 hrs.	4 hrs. or more
Base: Total answering	378	111	197	70
Search engines (Google, Yahoo)	96%	95%	96%	96%
E-Newsletters	52%	40%	53%	<b>67%</b>
Supplier websites	48%	45%	47%	<b>59%</b>
Chemical industry magazines (printed material)	44%	14%	52%	<b>64%</b>
Chemical industry websites (ChemicalProcessing.com, etc)	46%	27%	48%	<b>73%</b>
Social media	33%	25%	34%	<b>43%</b>
Distributor websites	23%	20%	22%	<b>32%</b>

**Industry professionals use chemical industry magazines and magazine websites most often to keep current with trends and new products and technologies. Search engines are used most often to look for suppliers/products, investigate solutions/ideas for current problems/projects, research a vendor under consideration and learn about new vendors.**

Which information resources do you rely on for each task?

	<u>Chemical Industry Magazines</u>	<u>Chemical Industry Magazine Websites</u>	<u>Search Engines</u>	<u>Supplier Websites</u>	<u>Supplier/Distributor Reps</u>	<u>Social Media</u>	<u>Directories</u>
Keep current with industry trends	<b>54%</b>	<b>64%</b>	40%	19%	13%	10%	3%
Keep current with new products, technologies	<b>48%</b>	<b>59%</b>	40%	26%	16%	10%	4%
Learn about new vendors	31%	39%	<b>63%</b>	29%	14%	11%	10%
Investigate solutions/ideas for current problems/projects	31%	42%	<b>68%</b>	32%	18%	7%	3%
Look for suppliers/products	23%	28%	<b>68%</b>	38%	21%	5%	14%
Research a vendor under consideration	14%	21%	<b>64%</b>	43%	17%	9%	7%

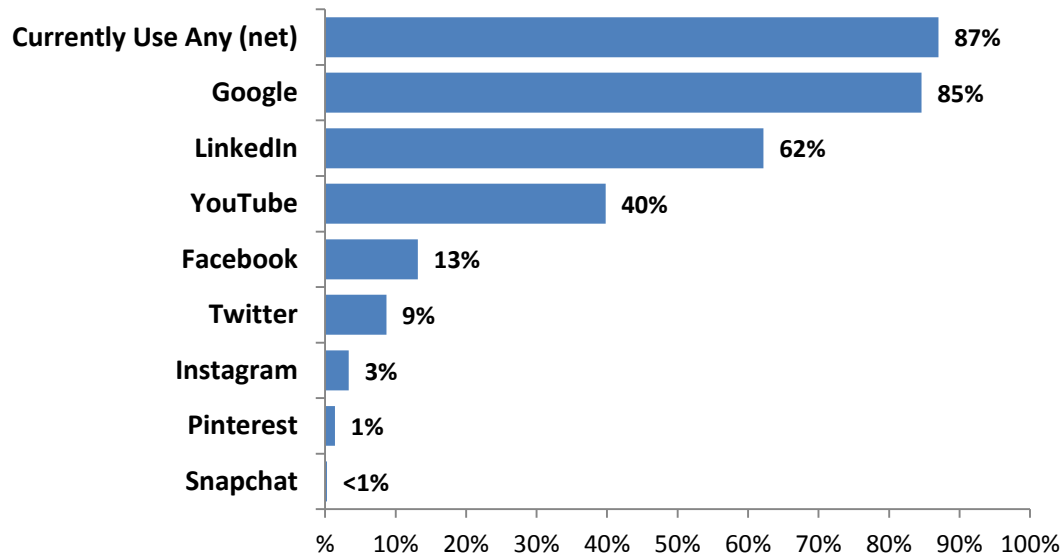
Base: 364 respondents who answered the question



**87% of chemical processing professionals use online networking and social media for business purposes. Google and LinkedIn are used most often. 65% say their companies do not block access to social media sites.**

Please indicate which, if any, of the following tools/services you currently use for business purposes:

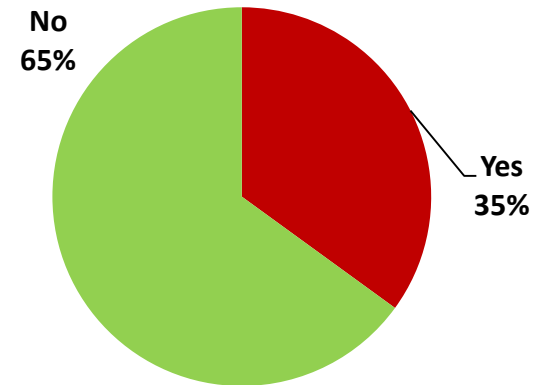
### Use Online Networking/Social Media



Base: 357 respondents who answered the question

Does your company block access to the above social media?

### Company Blocks Access



Base: 377 respondents who answered the question

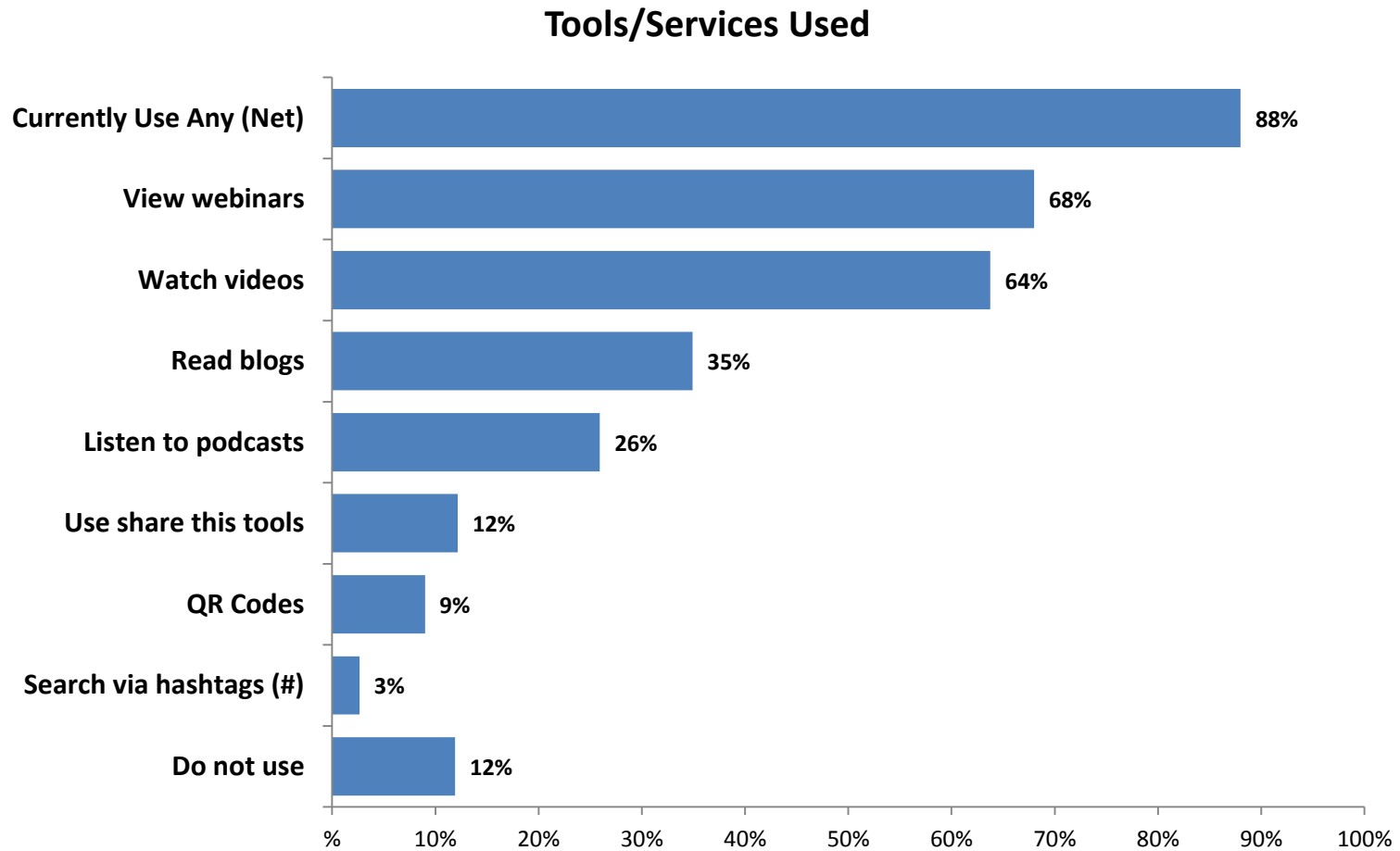
## Tools and services used remains consistent regardless of age.

Please indicate which, if any of the following tools/services you currently use for business purposes:

	<b>Total</b> -----	<b>45 &amp; under</b> -----	<b>46-55</b> -----	<b>Over 55</b> -----
Base: Total answering	378	112	80	177
Use Any: Net	87%	96%	95%	92%
Google	85%	83%	83%	86%
LinkedIn	62%	63%	70%	58%
Youtube	40%	40%	45%	39%
Facebook	13%	17%	15%	9%
Twitter	9%	11%	9%	5%
Instagram	3%	7%	1%	2%
Pinterest	1%	3%	-	1%

**88% of chemical industry professionals say they use a variety of digital tools/services. 68% view webinars and 64% watch videos.**

Are you currently using any of the following tools/services?

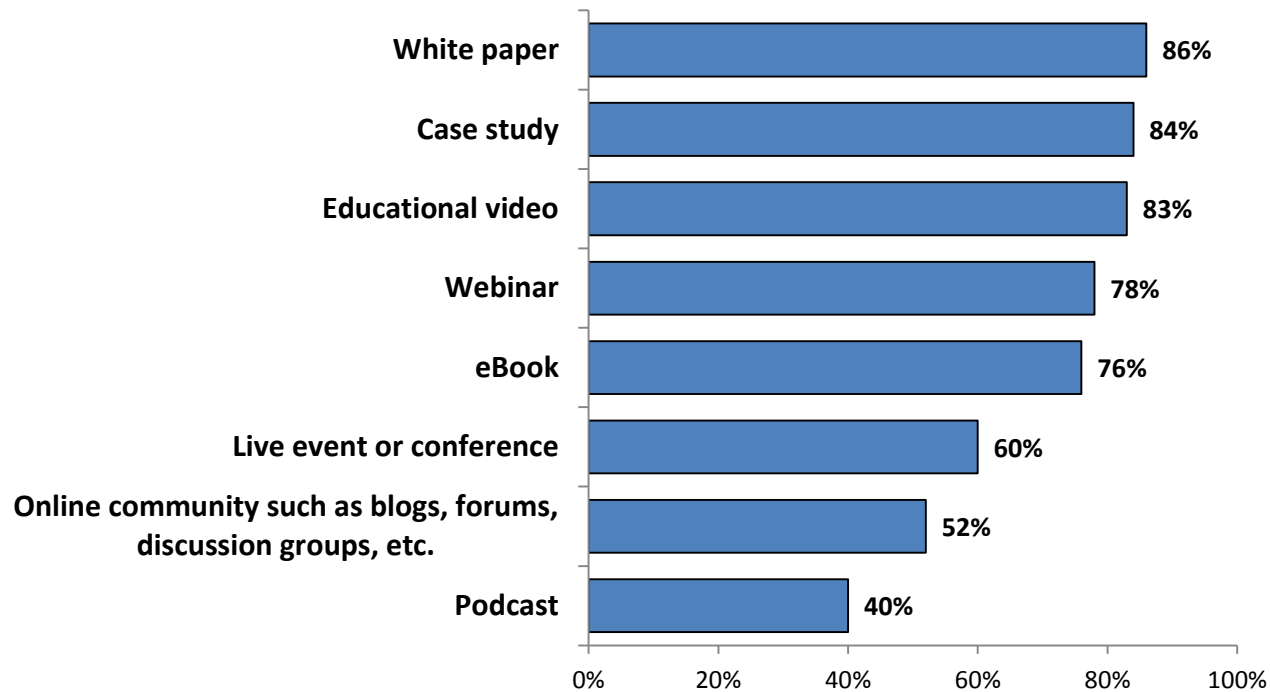


Base: 378 respondents who answered the question

Chemical industry professionals look to educational content that provides problem solving ideas and practical solutions as they dig deeper into solution exploration and product evaluation. More than eight out of ten are very likely/likely to register for free access to white papers, case studies and educational videos. In addition, about three-fourths are very likely/likely to register for free webinars and eBooks.

How likely are you to register for free access to the content for each of the following?

### Likelihood of Registering for Free Content Access (Net Very Likely/Likely)



Base: 367 respondents who answered the question

**Chemical processing professionals 55 years of age and younger are more likely to register for free access to many forms of educational content than older respondents.**

How likely are you to register for free access to the content for each of the following?

<b>Net Very Likely/Likely</b>	<b>Total</b>	<b>45 &amp; under</b>	<b>46-55</b>	<b>Over 55</b>
	-----	-----	-----	-----
Base: Total answering	367	111	78	170
White paper	86%	79%	87%	88%
Case study	84%	84%	85%	81%
Educational video	83%	<b>85%</b>	<b>87%</b>	76%
Webinar	78%	78%	77%	76%
eBook	76%	<b>86%</b>	<b>77%</b>	65%
Live event or conference	60%	61%	63%	56%
Online community such as blogs, forums, discussion groups, etc.	52%	<b>63%</b>	47%	45%
Podcast	40%	46%	32%	38%

**Chemical processing professionals who spend more time reading work-related magazines are more likely to register for free content access in most cases.**

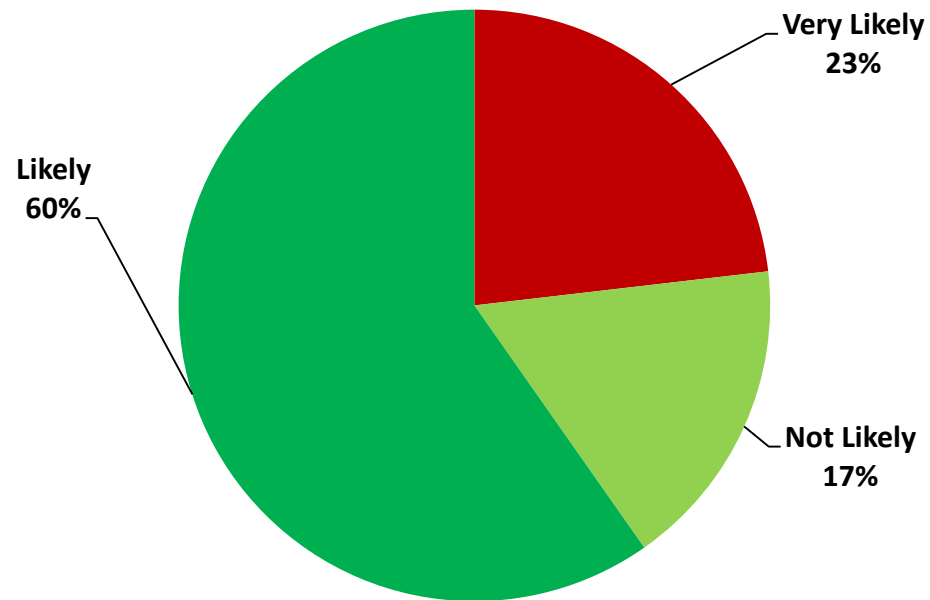
How likely are you to register for free access to the content for each of the following?

	Total	Hrs. per week reading chemical industry trade magazines:		
		Less than 1 hr.	1 - 3 hrs.	More than 4 hrs.
Base: Total answering	367	106	192	69
White paper	86%	75%	<b>90%</b>	<b>91%</b>
Case study	84%	72%	<b>88%</b>	<b>90%</b>
Educational video	83%	72%	<b>85%</b>	<b>88%</b>
Webinar	78%	72%	77%	<b>90%</b>
eBook	76%	66%	75%	<b>94%</b>
Live event or conference	60%	44%	<b>67%</b>	<b>75%</b>
Online community such as blogs, forums, discussion groups, etc.	52%	32%	56%	<b>68%</b>
Podcast	40%	31%	37%	<b>62%</b>

**83% of respondents are very likely/likely to contact a vendor that has produced relevant and authoritative content.**

What is the likelihood of you contacting a vendor that has produced relevant and authoritative content (such as eBook, white paper, case study, webinar, video, podcast, etc.)?

### Likelihood of Contacting Vendor

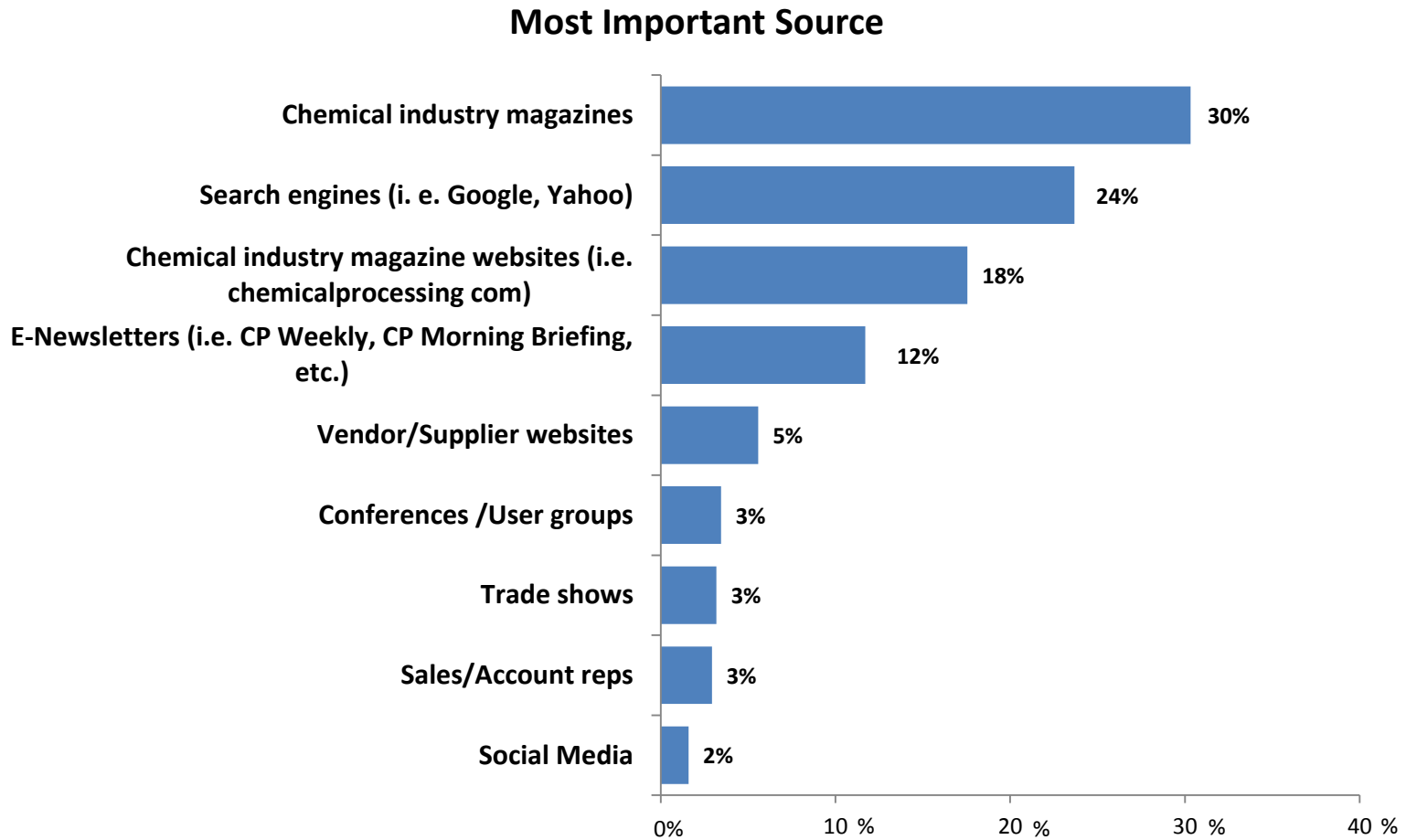


Base: 380 respondents who answered the question

**Chemical industry magazines are the most important source used to stay current with technologies, products and vendors, mentioned by 30% of respondents.**

Please indicate the most important industry source you would use for the following areas:

**Staying current with technologies, products and vendors**



Base: 376 respondents who answered the question



**Chemical industry magazines are the most important source used to stay current with technologies, products and vendors among respondents over 45 years of age. Those 45 and younger use search engines most often, followed by chemical industry magazines and chemical industry magazine websites.**

Please indicate the most important industry source you would use for the following areas:

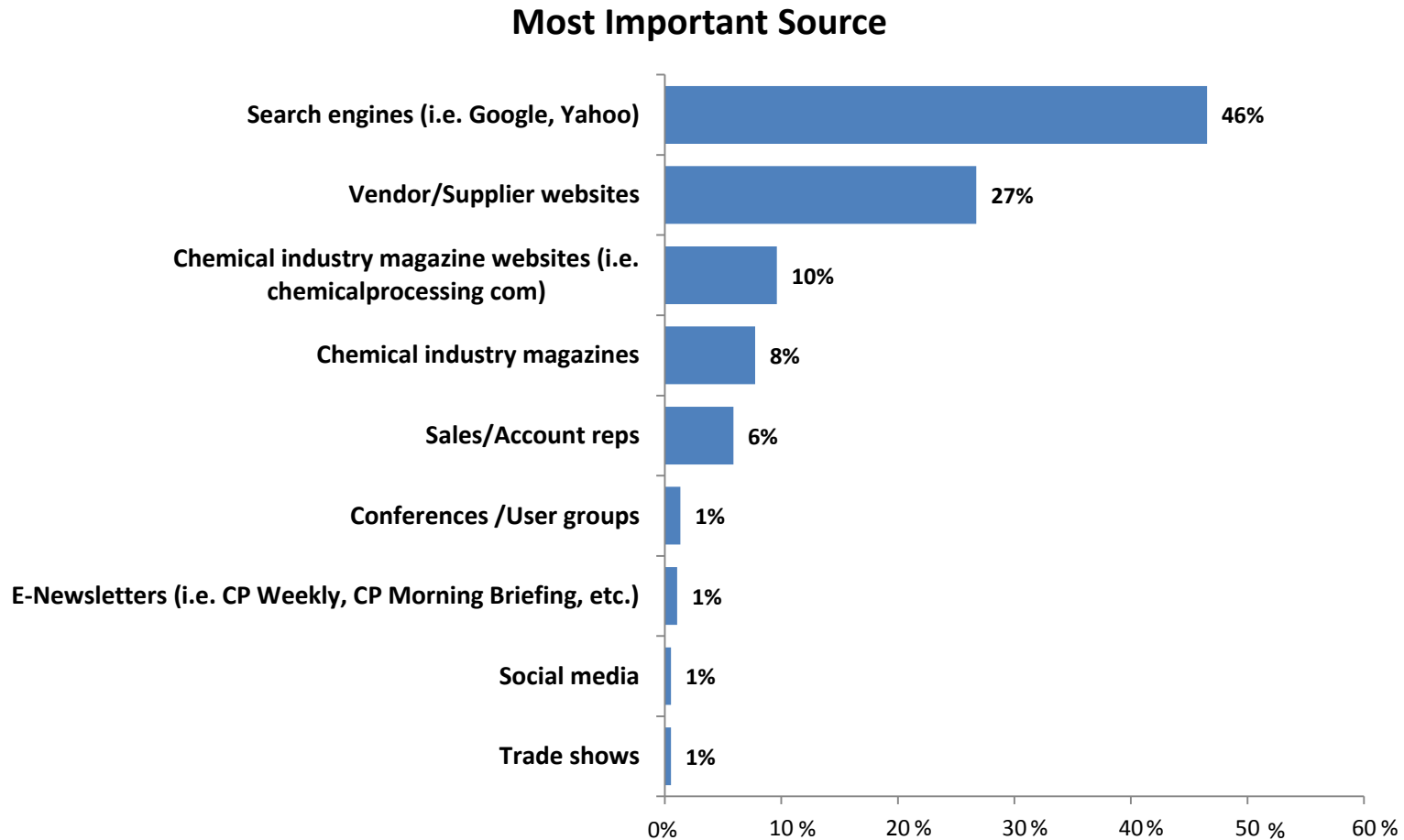
**Staying current with technologies, products and vendors**

<b>Most Important Source</b>	<b>Total</b>	<b>45 &amp; under</b>	<b>46-55</b>	<b>Over 55</b>
	-----	-----	-----	-----
Base: Total Answering	376	112	80	177
Chemical industry magazines (printed materials)	30%	20%	<b>31%</b>	<b>36%</b>
Search engines (i.e. Google, Yahoo)	24%	<b>32%</b>	14%	23%
Chemical industry magazine websites (i.e. chemicalprocessing.com)	18%	20%	16%	17%
E-Newsletters (i.e. CP Morning Briefing, CP Weekly.)	12%	12%	7%	13%
Vendor/Supplier websites	5%	7%	10%	3%
Trade shows	3%	3%	5%	2%
Conferences/User Groups	3%	2%	9%	2%
Sales/Account reps	3%	2%	4%	3%
Social media	2%	2%	4%	1%

# Search engines are the most important source for obtaining information or specifications for products as respondents begin a new project.

Please indicate the most important industry source you would use for the following areas:

Obtaining information or specifications for products as you begin a new project.



Base: 374 respondents who answered the question

**Search engines are the most important source used to obtain information or specifications for products regardless of age.**

Please indicate the most important industry source you would use for the following areas:

**Obtaining information or specifications for products as you begin a new project.**

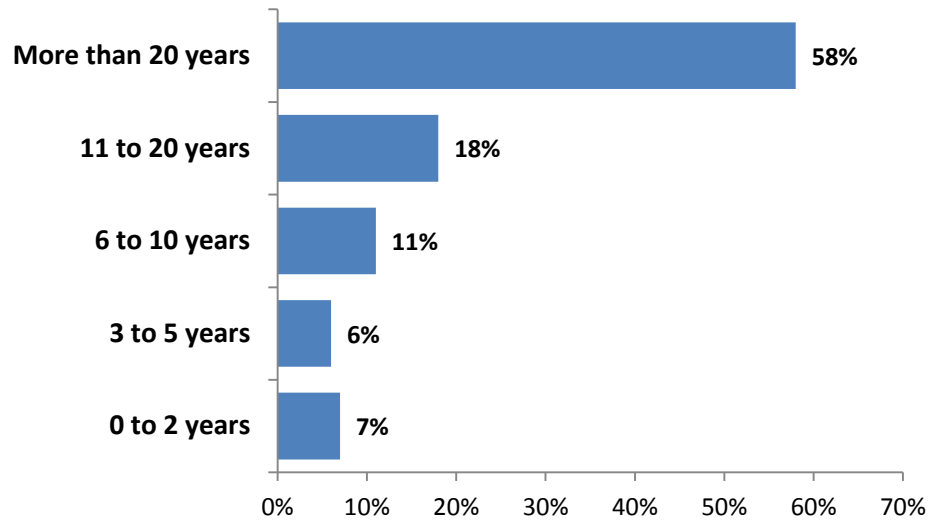
<b>Most Important Source</b>	<b>Total</b>	<b>45 &amp; under</b>	<b>46-55</b>	<b>Over 55</b>
	-----	-----	-----	-----
Base: Total answering	374	112	80	174
Search engines (i.e. Google, Yahoo)	46%	50%	44%	46%
Vendor/Supplier websites	27%	23%	28%	29%
Chemical industry magazine websites (i.e. chemicalprocessing.com)	10%	10%	8%	10%
Chemical industry magazines (printed materials)	8%	4%	10%	8%
Sales/Account reps	6%	6%	7%	5%
E-Newsletters (i.e. CP Morning Briefing, CP Weekly)	1%	-	2%	1%
Conferences/User Groups	1%	4%	-	1%
Trade shows	1%	1%	1%	-
Social media	1%	2%	-	-

**Respondents are seasoned professionals. They have been in the chemical industry for an average of 16.3 years, in their current companies an average of 11.4 years and in their current positions an average of 11.6 years.**

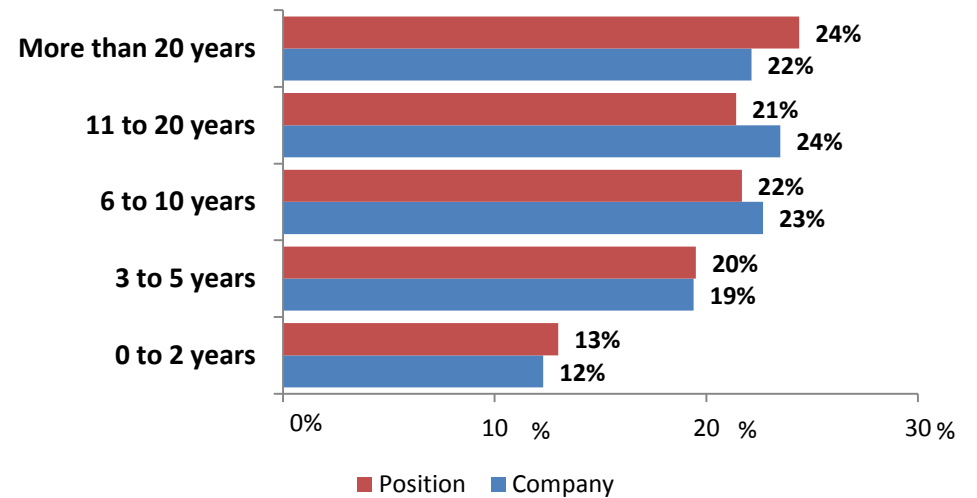
How long have you been in the chemical industry?

How long have you been in the chemical industry?  
How long have you been in your current position?

### Number of Years in Chemical Industry



### Number of Years at Current Company/Position



**Average: 16.3 years in the chemical industry**

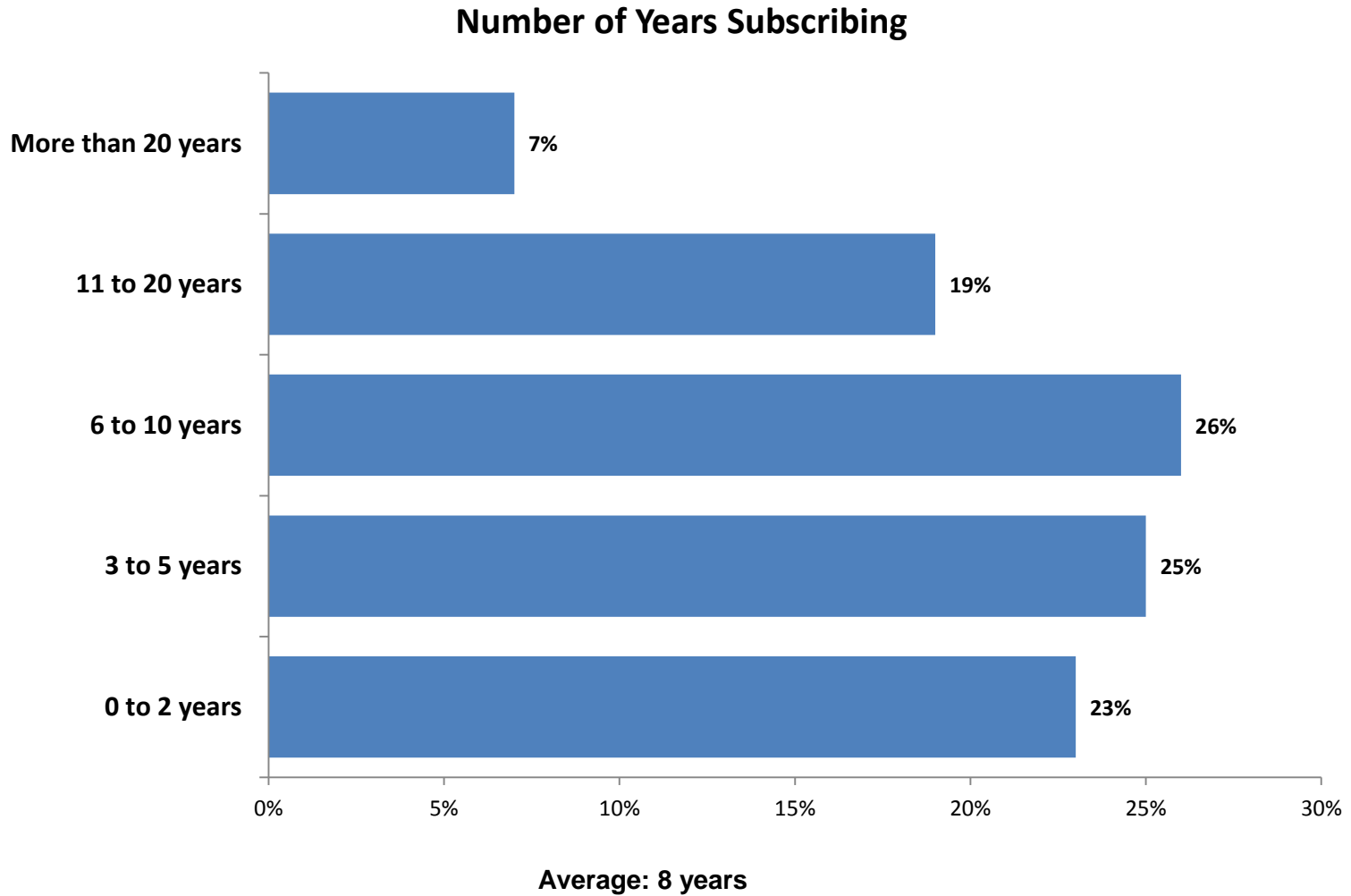
**Average: 11.4 years at current company**  
**Average: 11.6 years in current position**

Base: 366 respondents who answered the question

Base: Current position – 369 respondents who answered the question  
Current company – 366 respondents who answered the question

Respondents have been subscribing to *Chemical Processing* magazine an average of 8 years.

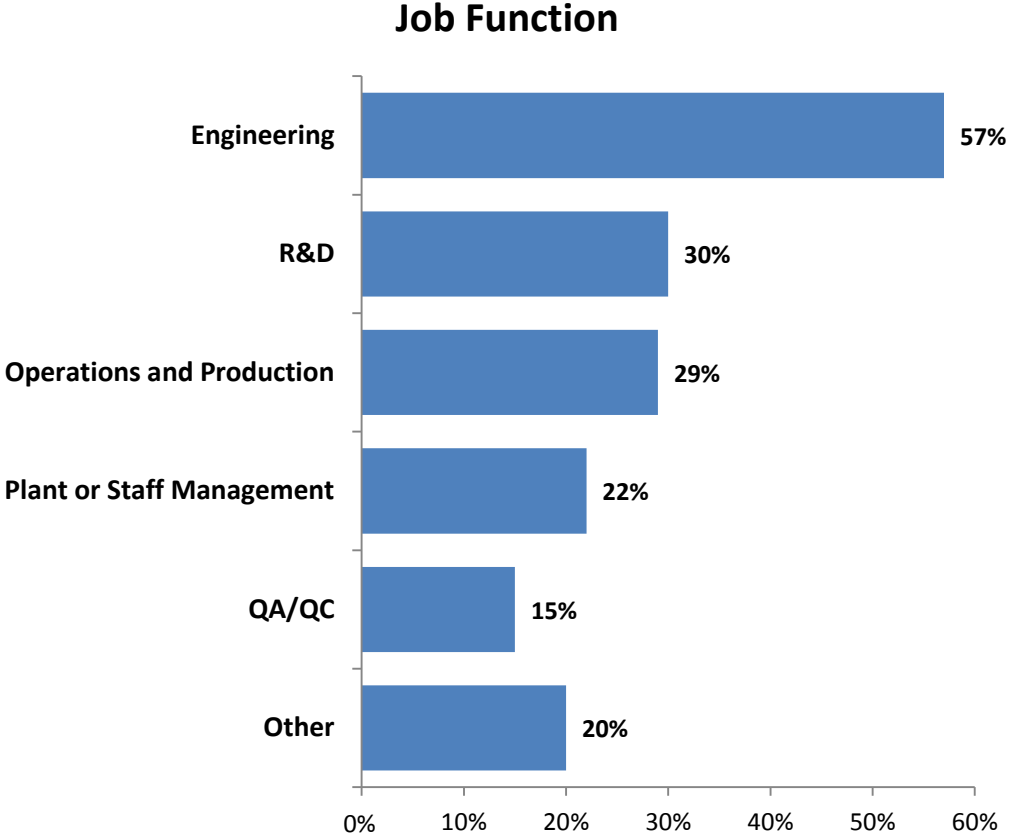
How long have you been a subscriber to *Chemical Processing* Magazine?



Base: 368 respondents who answered the question

**Respondents have a variety of job functions – Engineering is mentioned most often followed by Research and Development and Operations and Production.**

Which of the following are part of your job responsibilities?



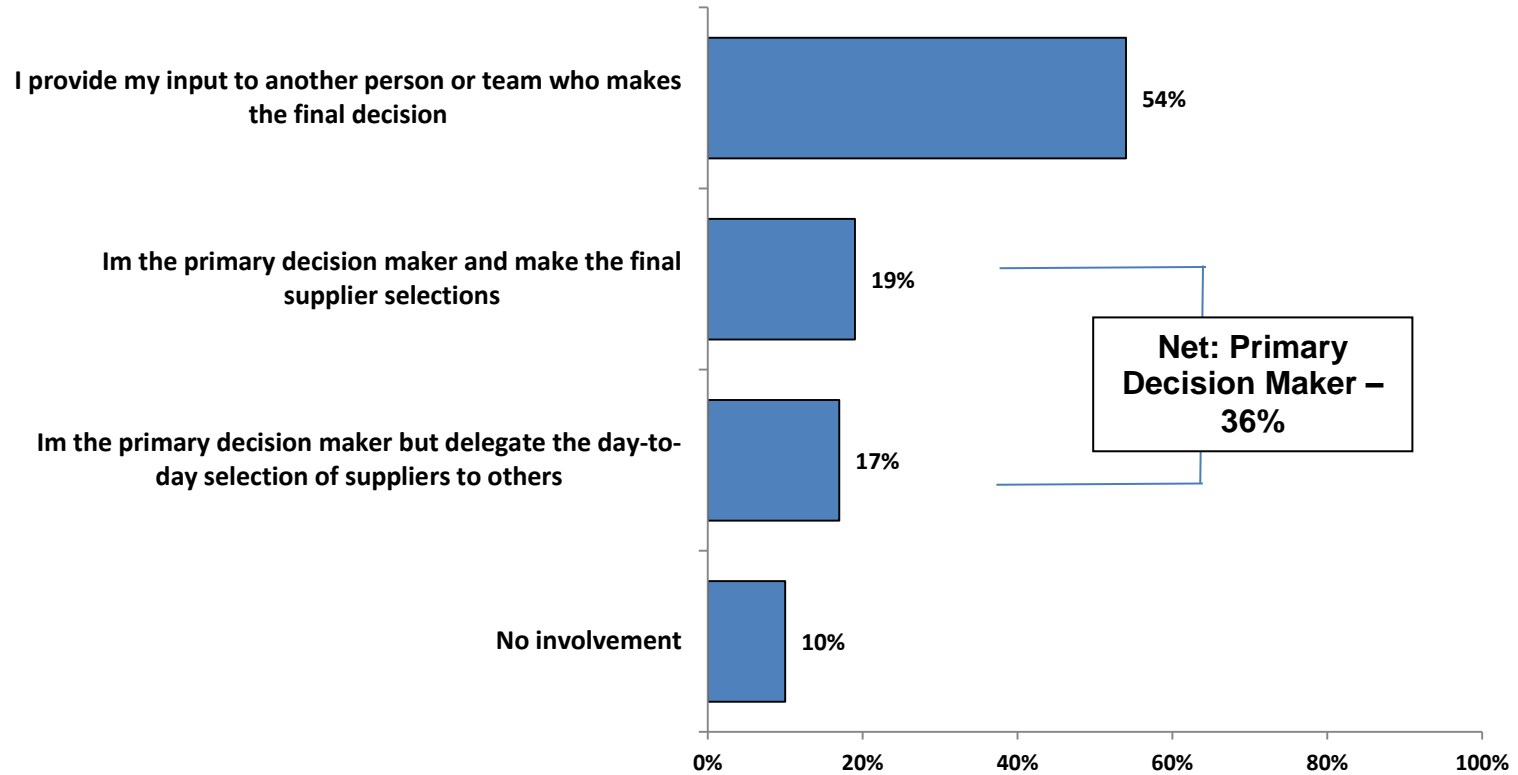
Note: Total exceeds 100% due to multiple responses.

Base: 368 respondents who answered the question

**90% of survey respondents are involved in selecting suppliers for their companies. 36% are the primary decision makers.**

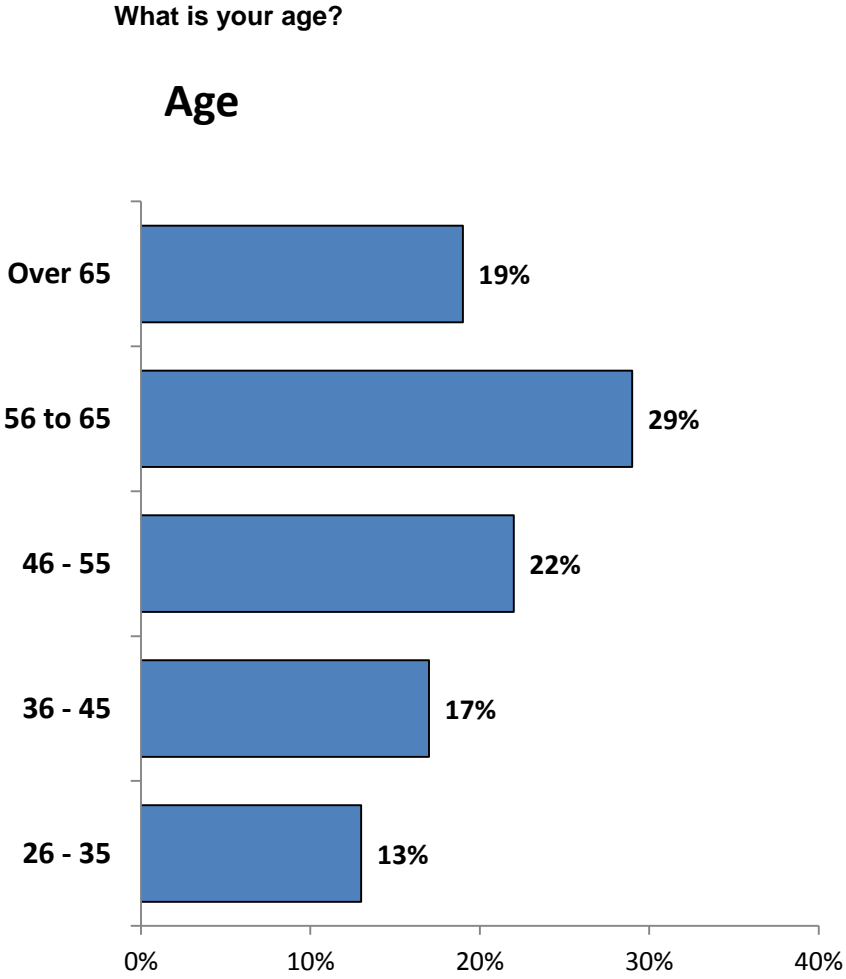
Which of the following best describes your role in selecting your company's suppliers?

### Role in Selecting Suppliers



Base: 367 respondents who answered the question

The average age of survey respondents is 53 years.



**Average: 53 years**

Base: 369 respondents who answered the question