



# AMD U.S. Workstation Research Readout

*04.18.22 (rev. 4.21.22)*

# AMD U.S. WORKSTATION RESEARCH READOUT FLOW

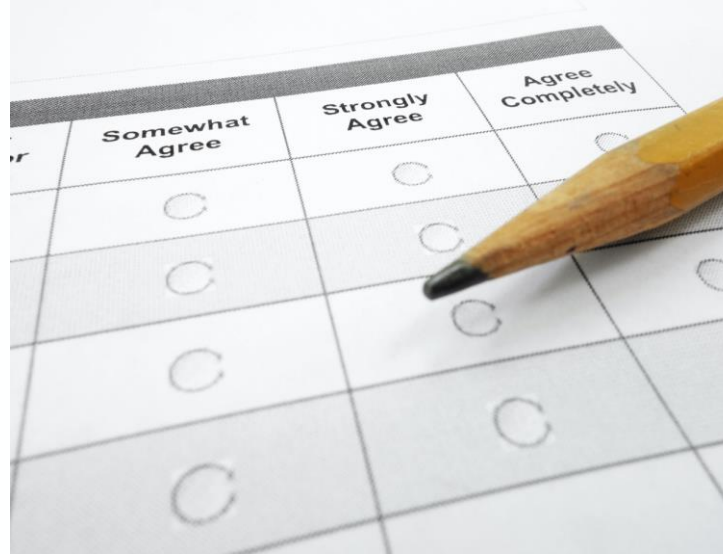


# U.S. WORKSTATION INITIATIVE OVERVIEW



## OBJECTIVES

- Define top workstation personas for targeting and related messaging, considering company size and vertical
- Gain insight into the consumer buyer's journey (information sources, content preferences, and emotional states) across the different stages of the sales cycle
- Gain an understanding of where end users influence the purchasing decision for SMB



## APPROACH

- Conduct informal, qualitative research – ITDMs, End Users, AMD Stakeholders
- Conduct two, 10-minute, U.S. quantitative surveys consisting of 750 ITDMs and End Users in the following industries in various company sizes.
  - Design & Manufacturing
  - Architects, Engineers, and Construction
  - Media & Entertainment
  - Financial
  - Software and Sciences



## OUTPUT

### Part 1 – Research Readout

- 5 personas defined
- Data-driven readout of key findings

### Part 2 – Buyer's Journey Roadmaps

- 5 buyer's journey maps, including the role of communications at each stage.
- Key pain points & messages



TOP  
PERSONA  
PROFILES

# END USER PERSONA SNAPSHOTS

## Data Science End User

**JANICE,**  
Data Scientist  
Application/Output-  
Focused Across Verticals



### PERSONAL WORKSTATION

- OEM brand: Dell (30%), Apple (27%)
- Processor: Intel (56%)
- Refresh Cycle: (56% every 2-4 years)

### TOP NEEDS/ REQUESTS

1. Applications needed to run on the workstation (74%)
2. Specific workstation specs (73%)

### TOP CRITERIA:

1. Speed/performance (62%)
2. Memory (49%)
3. Processor (48%)

### ACROSS MY PURCHASE JOURNEY, THESE ARE THE...

- **Most influential channels:** OEM sites (36%), IT recommendations (36%), processor sites (33%). Higher use of analyst reports (26%) and ISV recommendations (13%) during awareness phase
- OEM sites: Dell (23%), HP (22%), Lenovo (17%)
- Processor sites: Intel (27%), AMD (16%), Apple (8%)
- **Most influential content:** workstation product benefits (40%), technical specs (38%), expert reviews (32%). Watch more YouTube (18%)
- **Most involved roles:** IT (79%) and Purchasing/Procurement (53%) departments

### PURCHASE DRIVERS

- Performance boost from new/other products (39%)
- Need for new capabilities (36%)
- Technology refresh cycle (36%)

## Medium/Small “Power” End User

**ALEX,**  
Senior Manager  
Across All Verticals



### PERSONAL WORKSTATION

- OEM brand: Dell & Apple equally (28%)
- Processor: Intel (61%)
- Refresh Cycle: (50% every 2-4 years)

### TOP NEEDS/ REQUESTS

1. Current system challenges (speed, memory, etc.) (70%)
2. Applications needed to run on the workstation (68%)

### TOP CRITERIA:

1. Speed/performance (61%)
2. Memory (52%)
3. Processor (50%)

### ACROSS MY PURCHASE JOURNEY, THESE ARE THE...

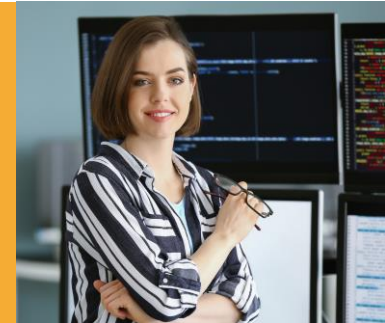
- **Most influential channels:** IT recommendations (33%), OEM sites (30%) & processor sites (24%)
- OEM sites: Dell (17%), HP (14%), Lenovo (10%)
- Processor sites: Intel (18%), AMD (6%), Apple (7%)
- **Most influential content:** workstation product benefits (36%), technical specs (31%), expert reviews (26%), and digital advertising (26%)
- **Most involved roles:** IT (58%) and Purchasing/Procurement (48%)

### PURCHASE DRIVERS

- Existing products become obsolete or are no longer supported (34%)
- Technology refresh cycle (33%)
- Performance boost from new/other products (28%)

## 3D Modeling End User

**RENEE,**  
3D Modeling Artist  
Application/Output-  
Focused Across Verticals



### PERSONAL WORKSTATION

- OEM brand: Apple (27%), Dell (26%)
- Processor: Intel (54%)
- Refresh Cycle: (58% every 2-4 years)

### TOP NEEDS/ REQUESTS

1. Applications needed to run on the workstation (80%)
2. Specific workstation specs (71%)

### TOP CRITERIA:

1. Speed/performance (64%)
2. Memory (54%)
3. Processor (52%)

### ACROSS MY PURCHASE JOURNEY, THESE ARE THE...

- **Most influential channels:** OEM sites (36%), processor sites (34%), IT recommendations (35%). Higher use of analyst reports (29%)
- OEM sites: Dell (25%), HP (24%), Lenovo (17%)
- Processor sites: Intel (26%), AMD (22%), Apple (11%)
- **Most influential content:** workstation product benefits (40%), technical specs (39%), expert reviews (36%), and user reviews (31%)
- **Most involved roles:** IT (58%) and Purchasing/Procurement (48%). Lines of Business (18%) - higher than average

### PURCHASE DRIVERS

- Technology refresh cycle (40%)
- Need for new capabilities (38%)
- Performance boost from new/other products (35%)
- Existing products become obsolete or are no longer supported (35%)

# ITDM PERSONA SNAPSHOTS

## XL/Large ITDM

JIM,  
Chief Information  
Officer



### FIRMOGRAPHICS

- International (23%)
- Top Applications: Data Science (70%), Software Dev (61%), 3D Modeling & Design (59%)

### TOP PURCHASE CHALLENGES (equal ranking)

1. Supply chain issues (29%)
2. How to identify the best product for the task (28%)

### TOP TECHNOLOGY PRIORITIES:

1. Align IT performance metrics to business outcomes (55%)
2. Increase innovation (53%)

### ACROSS MY PURCHASE JOURNEY, THESE ARE THE...

- **Most influential channels:** OEM sites (42%), processor sites (37%), online search (35%). Final stages more driven by corporate discounts (28%) than Sm-Med (20%)
- OEM sites: Dell (35%), HP (28%), Lenovo (20%)
- Processor sites: Intel (33%), AMD (24%), Apple (13%)
- **Most influential content:** workstation product benefits (40%), technical specs (39%), expert (36%) reviews, user reviews (31%)
- Final stages more driven by pricing/deals information (34%)
- **Most involved roles:** IT (78%), Finance (10%), and Operations (2%)

### PURCHASE CRITERIA

- Speed/performance (60%)
- Processor brand (57%)
- Security (49%)

## Media & Ent. Vertical ITDM

LUCY,  
IT Director



### FIRMOGRAPHICS

- International (24%)
- Top Applications: 3D Modeling (69%), Data Science (60%), Software Development (59%)

### TOP PURCHASE CHALLENGES

1. Difficult to find the right configuration for my needs (29%)
2. Supply chain issues (26%)

### TOP TECHNOLOGY PRIORITIES:

1. Increase innovation (55%)
2. Align IT performance metrics to business outcomes (46%)

### ACROSS MY PURCHASE JOURNEY, THESE ARE THE...

- **Most influential channels:** processor sites (31%), OEM sites (30%), peer/colleague recommendations and end user requests (both 30%). Higher than average interest in YouTube (27%) and podcasts (17%)
- OEM sites: Dell (22%), HP (17%), Lenovo (11%)
- Processor sites: Intel (66%), AMD (27%), Apple (21%)
- **Most influential content:** Product specifications (82%), expert and user reviews (54%), partner communications (56%) More moved by print advertising than others (32%)
- **Most involved roles:** IT (80%) and Purchasing/Procurement (10%)

### PURCHASE CRITERIA

- Processor brand (45%)
- OEM/manufacturer brand (41%)
- Security (41%)
- Speed/performance (41%)

# Data Science End User

Application/Output-Focused Across Verticals

Janice,  
Data Scientist



# DATA SCIENCE END USER

Distinct purchasing behaviors across all verticals/segments at the application level. Fast growing, high demand function.

Meet Janice, Data Scientist

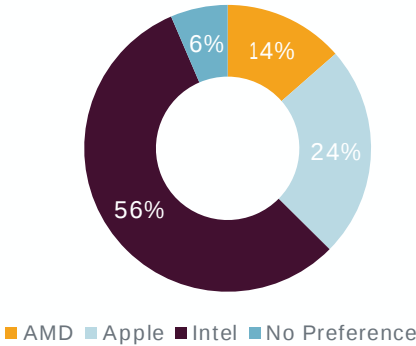
“The amount of data our client wanted us to analyze around their claims was in terabytes of data. Our workstations weren't able to manage that initially. We hadn't seen that in our data workloads prior and are getting more and more of those requests.”

- Average Age: 40, very under-indexed in the over 50 age ranges
- Workstation Form Factor – Desktop (87%) vs. mobile (13%) but high mobile in Sciences Technology Software
- Works with a combination of onsite and remote (70%)
- Collaborates with IT during the purchasing process with the exception of media/entertainment where this audience feels they are 100% the decision maker
- Financial Services is the highest ranking vertical/segment for this application

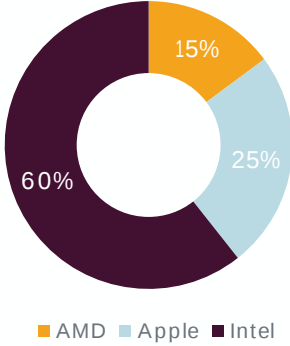
## PURCHASING BEHAVIOR

|                                   |                                                                                                                                                                                    |
|-----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Average Workstation Refresh Cycle | <ul style="list-style-type: none"> <li>2-4 years</li> </ul>                                                                                                                        |
| Primary Purchase Driver           | <ul style="list-style-type: none"> <li>Performance boost from new/other products (39%)</li> <li>Need for new capabilities (36%)</li> <li>Technology refresh cycle (36%)</li> </ul> |
| Key Purchase Criteria             | <ul style="list-style-type: none"> <li>Speed/Performance (62%), Memory (49%), Processor (48%)</li> </ul>                                                                           |
| Top Workstation Needs/Request     | <ul style="list-style-type: none"> <li>Applications needed to run on the workstation (74%)</li> <li>Specific workstation specs (73%)</li> </ul>                                    |
| Personal Workstation              | <ul style="list-style-type: none"> <li>Intel (56%)</li> <li>Dell (30%)</li> <li>Apple (27%)</li> </ul>                                                                             |

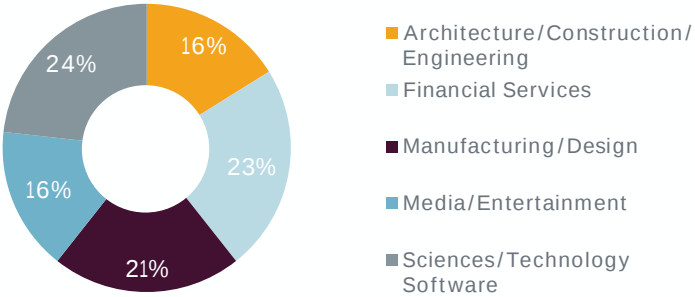
Preferred Processor



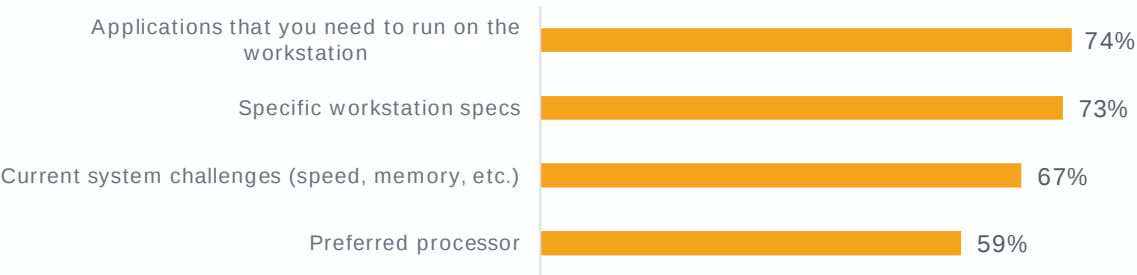
Purchased Processor



Industry Vertical

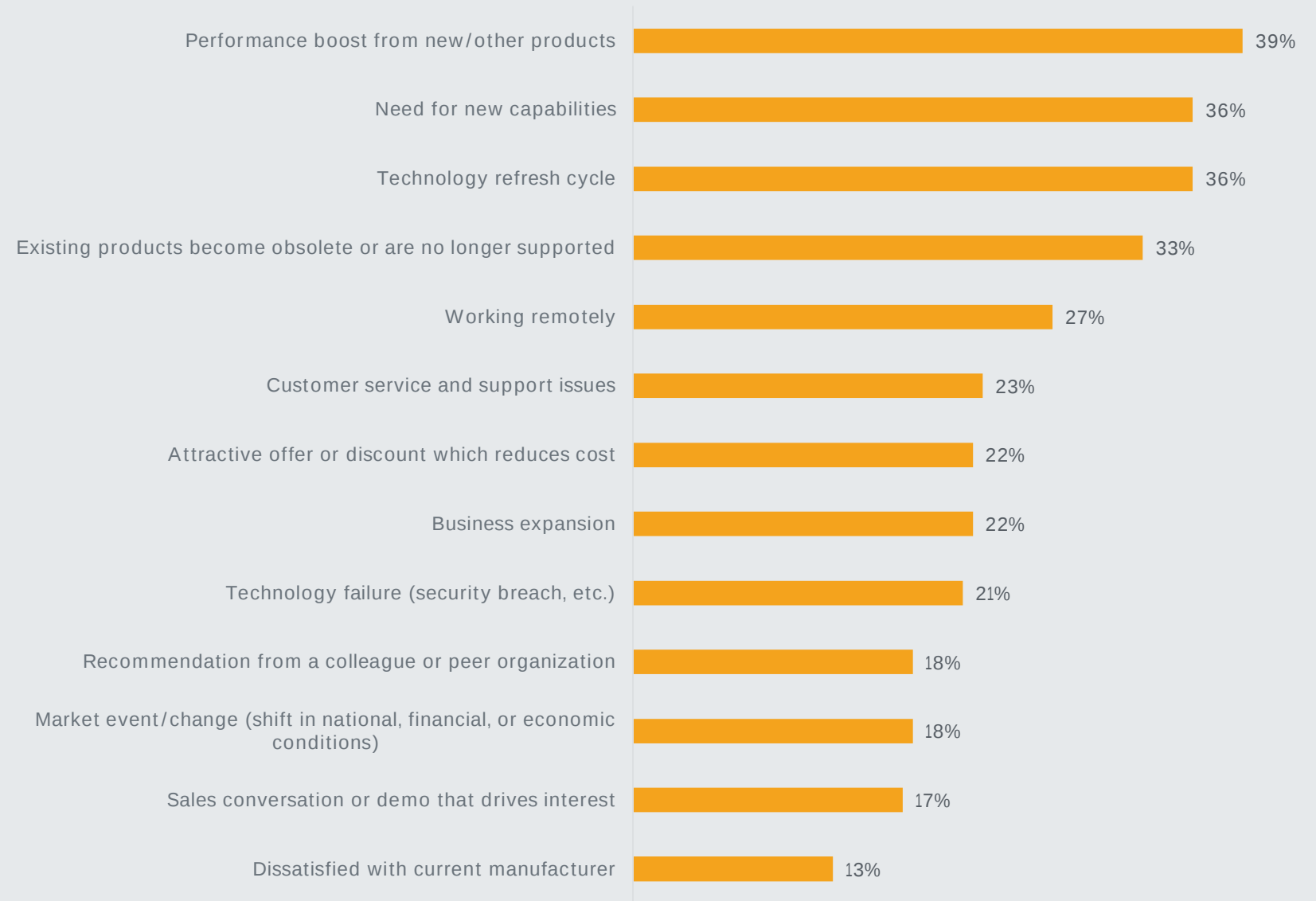


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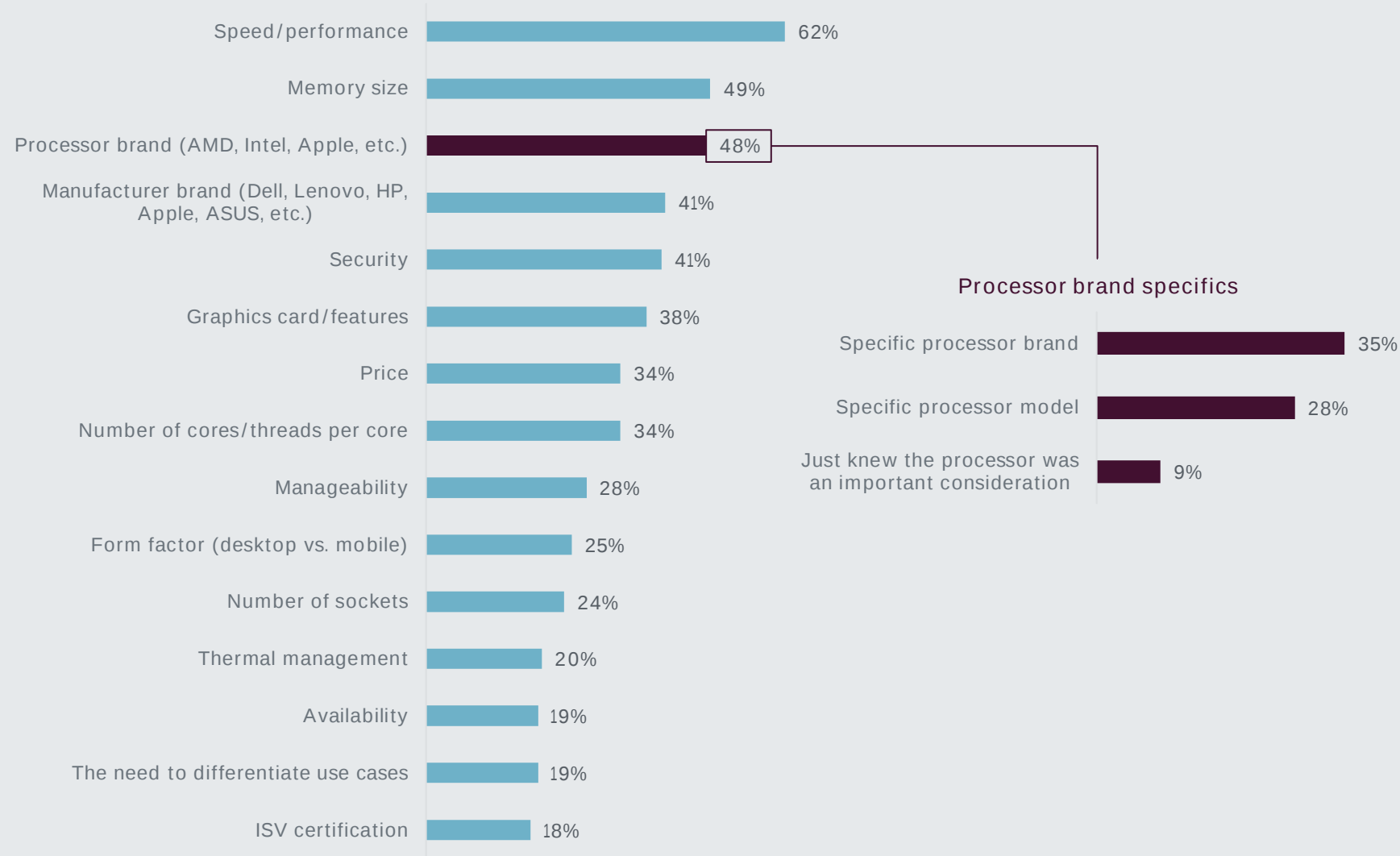
# DATA SCIENCE: REASONS FOR PURCHASING A WORKSTATION

- Performance boost from new/ other products ranks higher than other end users
  - Hardware ranks 6% higher than software
- Sales conversation or demo that drives interest rank higher than other end users
- Customer service and support issues ranks higher than others



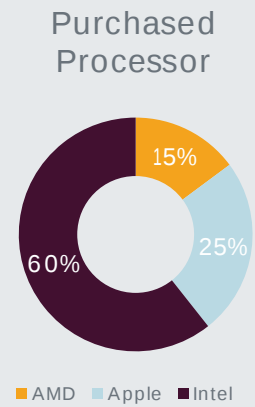
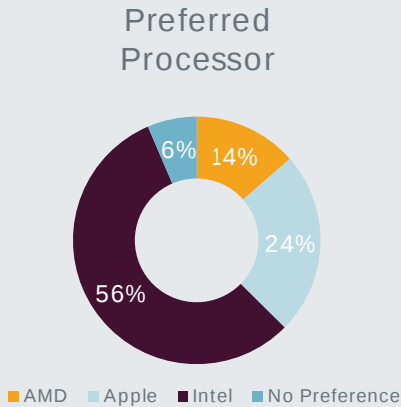
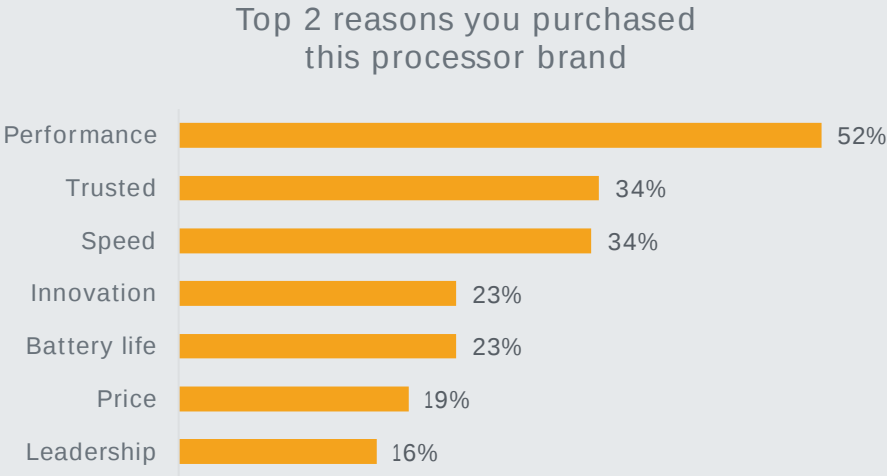
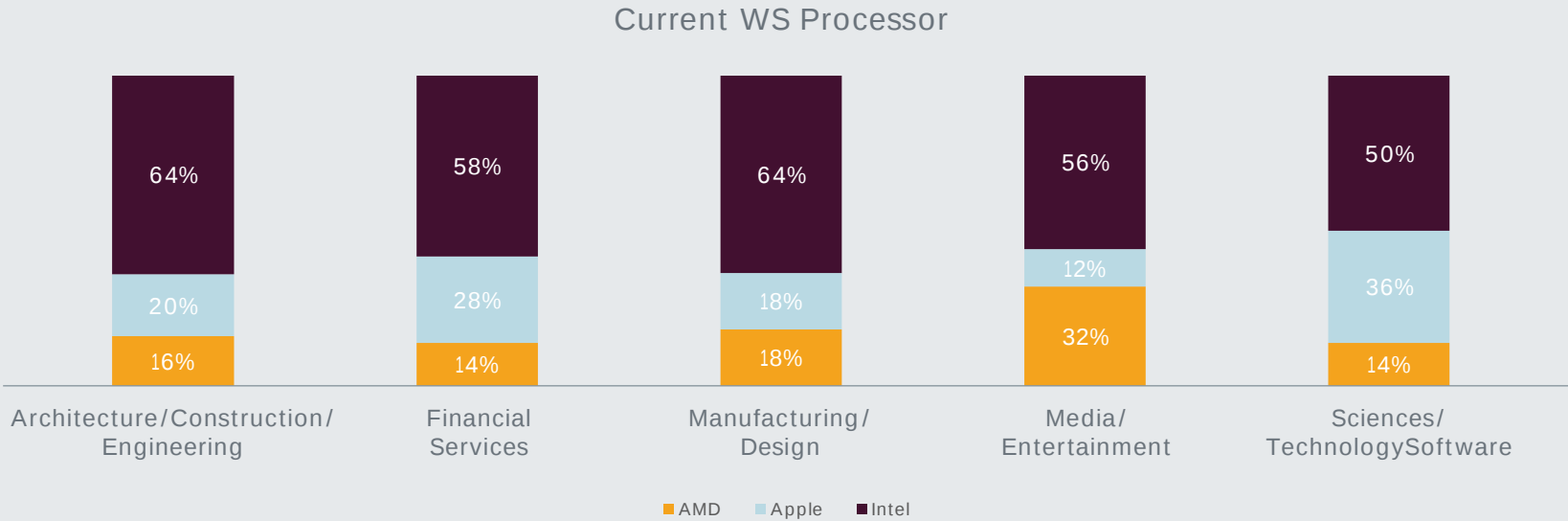
# DATA SCIENCE: WORKSTATION NEEDS PROVIDED TO IT & CRITERIA

- Speed/performance is a top criteria for end users
- Memory size has the 2<sup>nd</sup> highest overall ranking but has a fairly low #1 ranking
- Provide IT with the applications that they need to run on their workstations as well as specific specs
- 9% opportunity to capture share of preference



# DATA SCIENCE: PROCESSOR PREFERENCE & PURCHASE

- Apple currently beats AMD for both purchase and preference overall
- In a small sample, those who had purchased AMD cited battery life as one of their top 2 reasons *(well above average)*



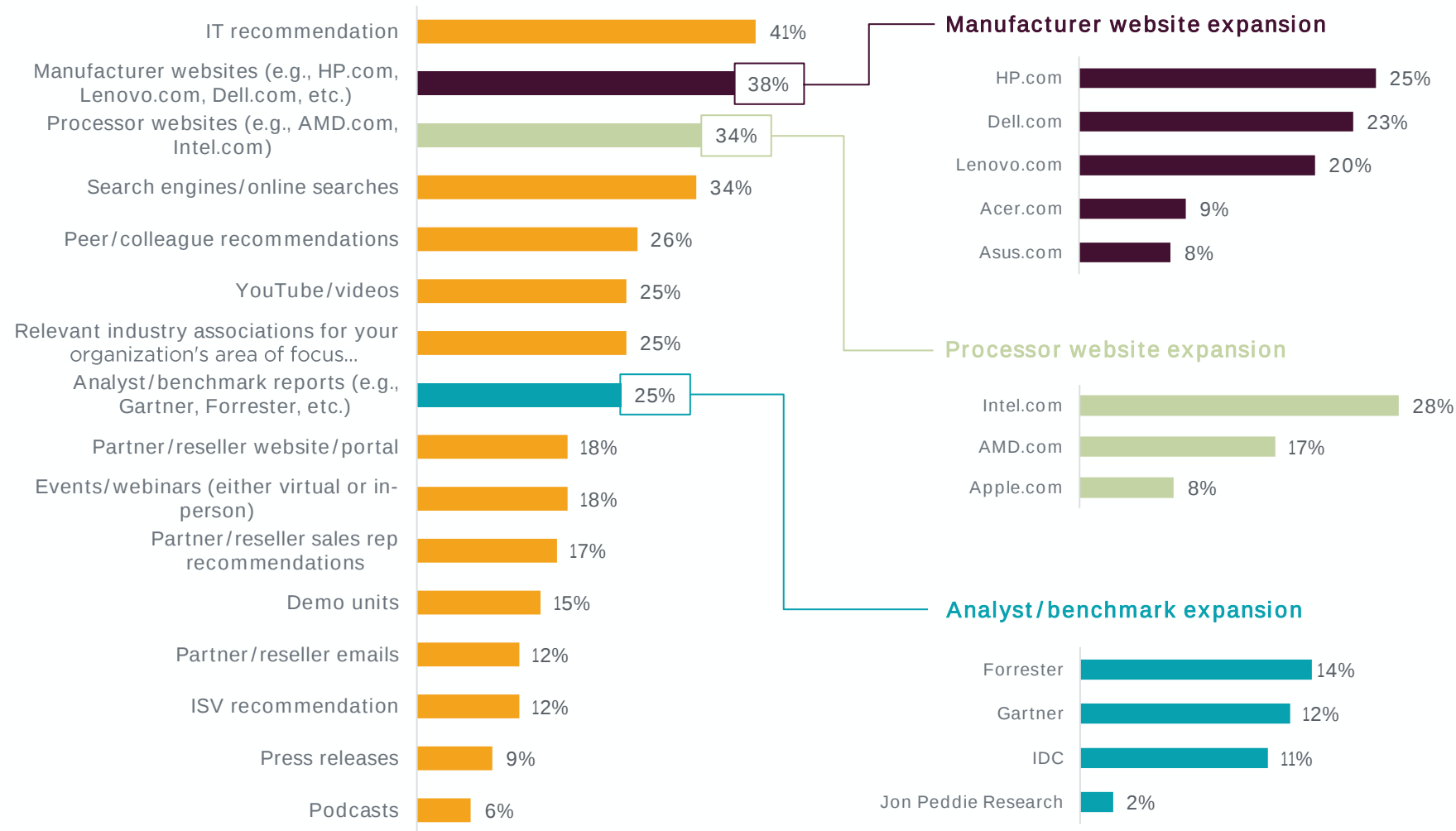
QS10. What brand of processor is in the PC/workstation that you primarily use?, Q4. Which processor brand is the most commonly purchased brand for workstations in your organization? Q4a. What are the top two reasons that you purchased this processor brand? Q5. Which processor brand would you prefer for the workstation you primarily use for work?

Source: Dialog AMD Workstation Persona & Buyer's Journey Research, April 2022 - U.S.

# BUYER'S JOURNEY - DATA SCIENCE

## AWARENESS CONTENT SOURCES

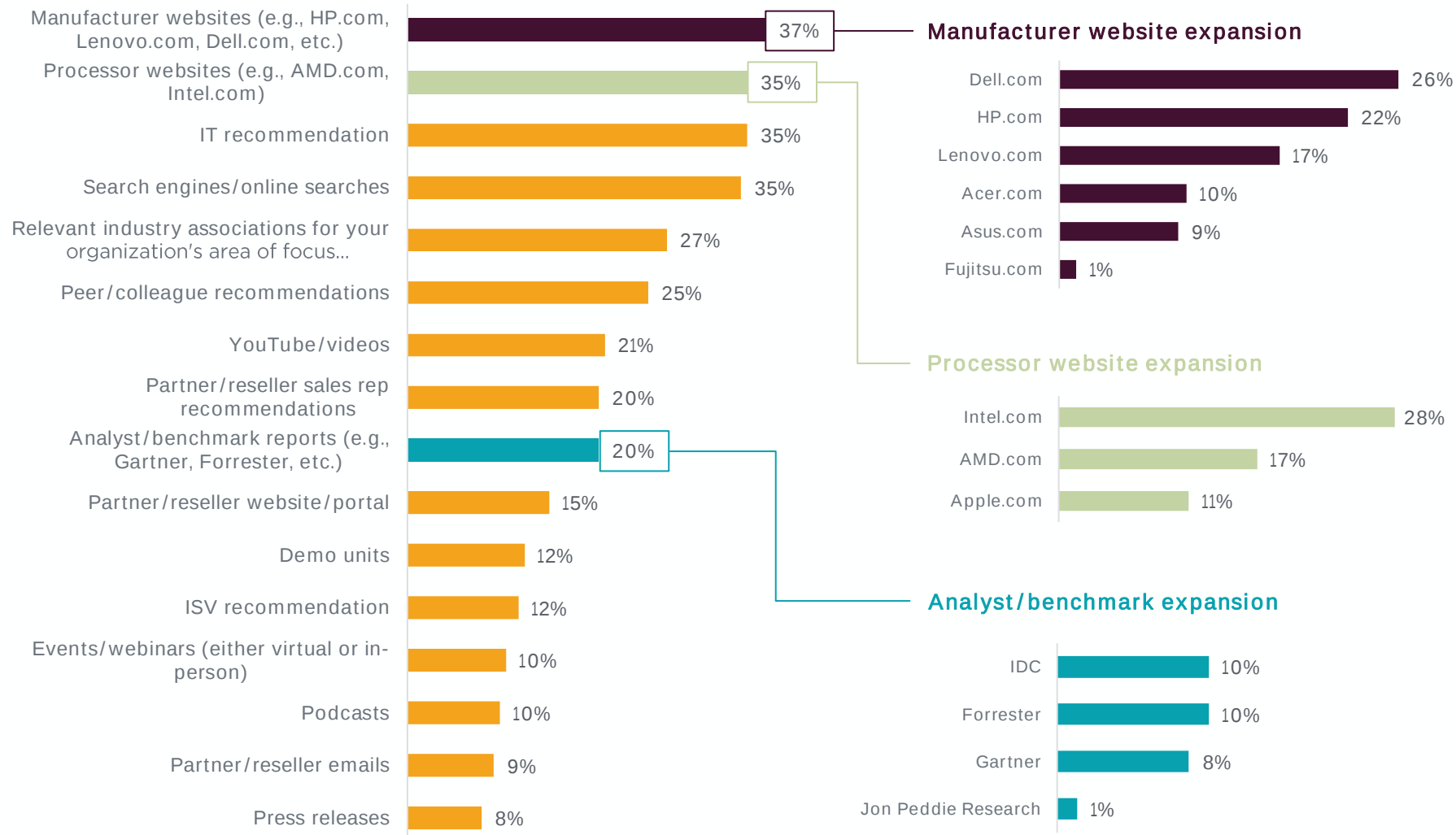
- IT recommendations and OEM sites are important
  - HP ranks higher than Dell for OEM sites
- AMD's site only ranks 10% below Intel's
- Over-indexed on analyst reports



# BUYER'S JOURNEY - DATA SCIENCE

## CONSIDERATION CONTENT SOURCES

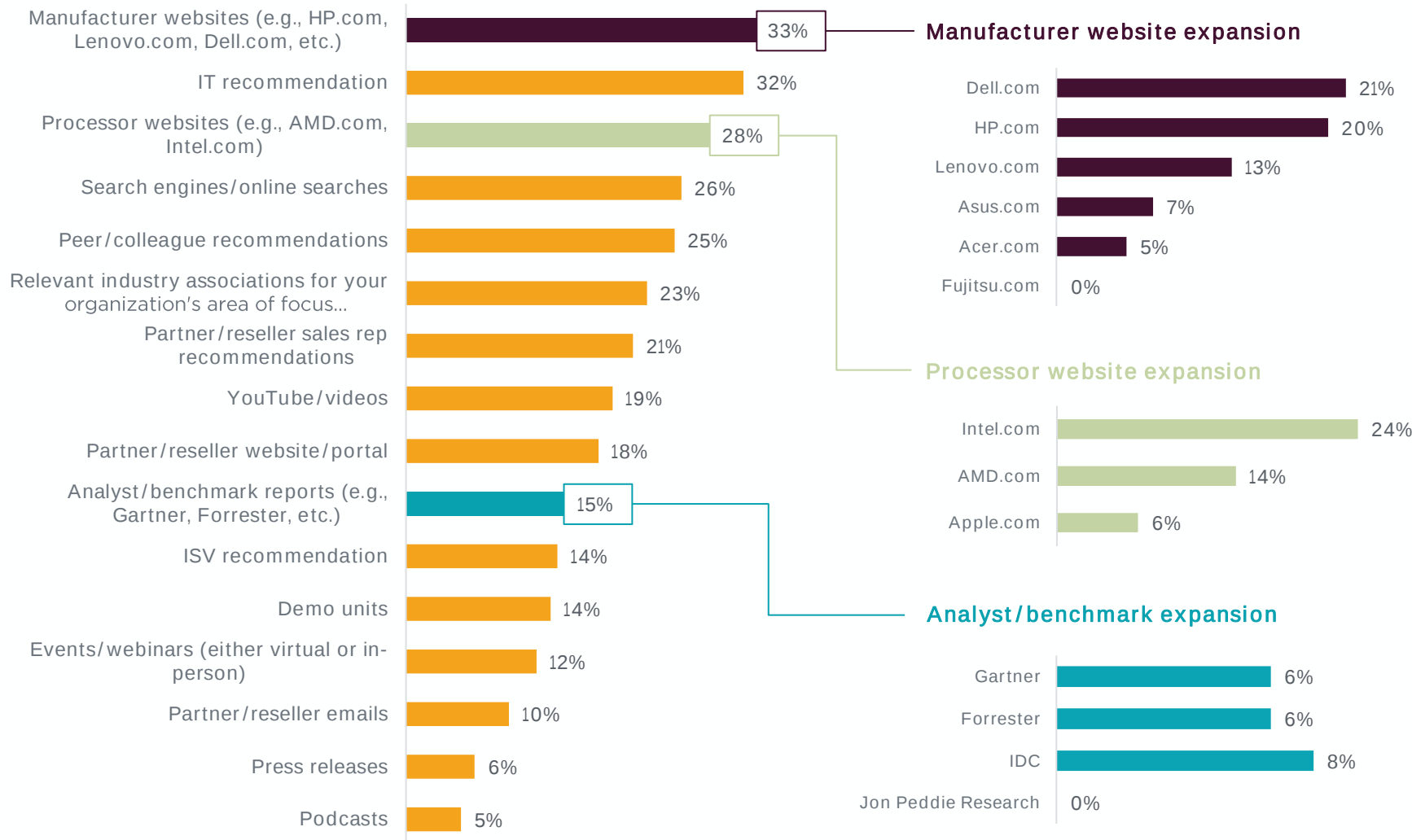
- OEM and processor websites continue to rank high along with IT recommendations and search
- Dell's site begins to pass HP's during this stage for preference



# BUYER'S JOURNEY - DATA SCIENCE

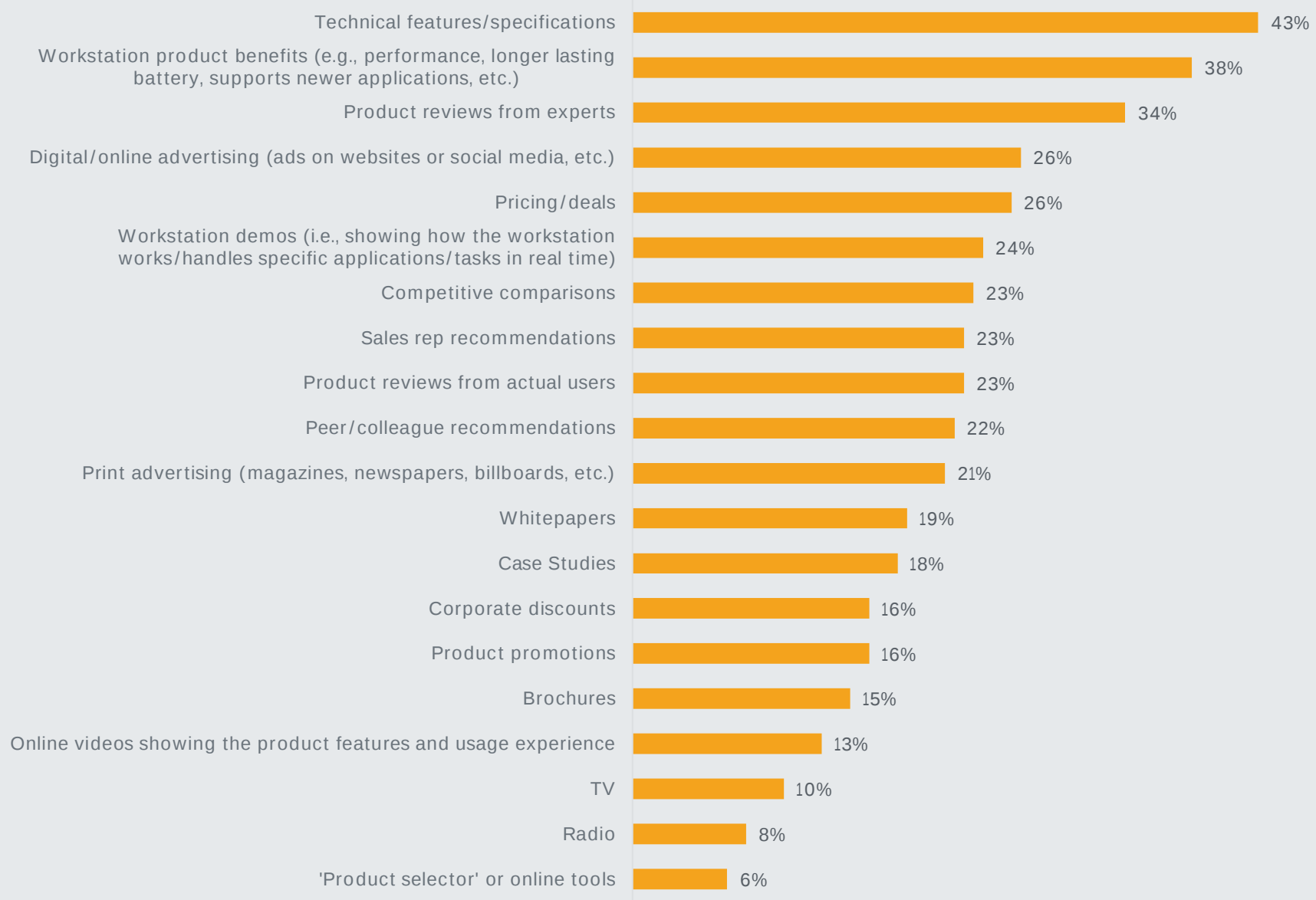
## PURCHASE CONTENT SOURCES

- Slight decline in most sources with the exception of ISV recommendations and demo units, which increase



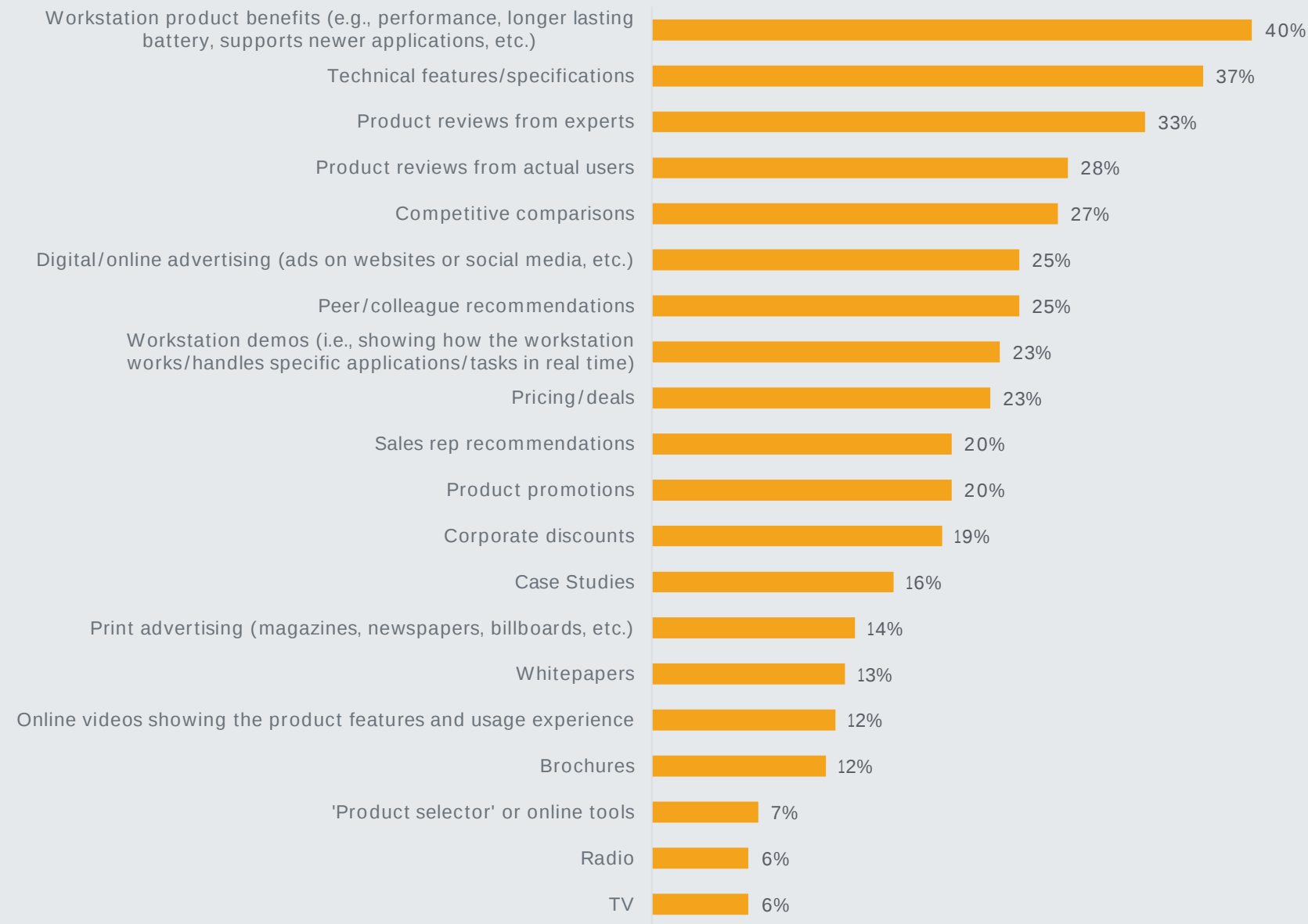
# DATA SCIENCE: AWARENESS CONTENT TYPES

- Value tech features/specs, workstation product benefits, and product reviews from experts likely due to their analytical nature
- Over-indexed on brochures, case studies, demos, and white papers
- Lowest rankings for user reviews and peer recommendations out of end user personas
- Digital ads, sales rep recommendations, and workstation demos rank high



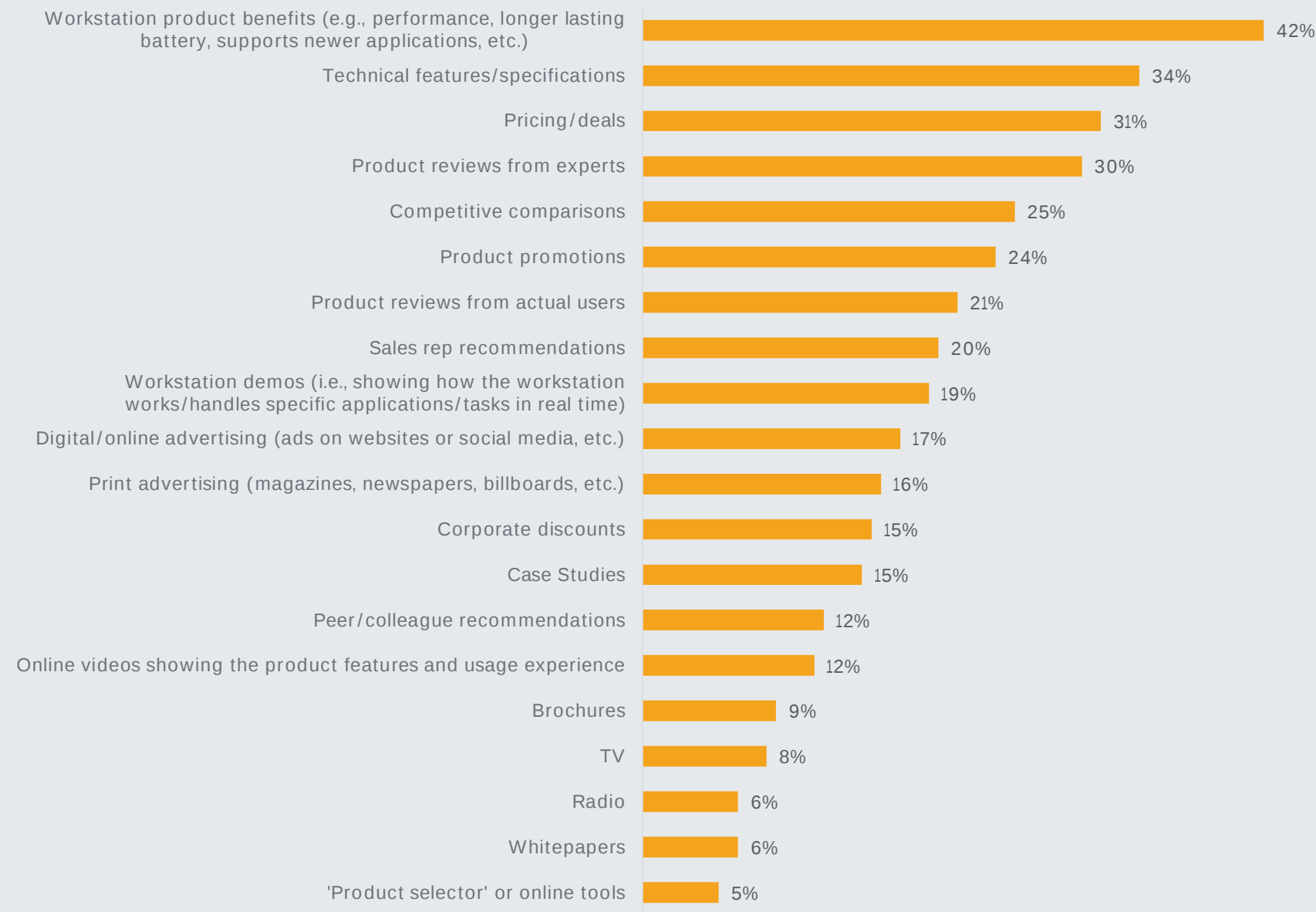
# DATA SCIENCE: CONSIDERATION CONTENT TYPES

- Product benefits increase slightly while tech specs decrease
- Competitive comparisons increase in value along with peer recommendations
- TV and radio decline while online advertising remains fairly steady
- Most over-indexed on Brochures and offers/info from their partners (resellers/OEMs)



# DATA SCIENCE: PURCHASE CONTENT TYPES

- Most types of content are reduced with the exception of product promotions and TV that have increases



# Medium/Small “Power” End User

Across Verticals

Alex,  
Senior Manager



# “POWER” END USER

Shaping the purchase process in companies of all sizes by serving as an influencer/resource to other users and IT via their trusted network.

## Meet Alex, Senior Manager (Across Verticals)

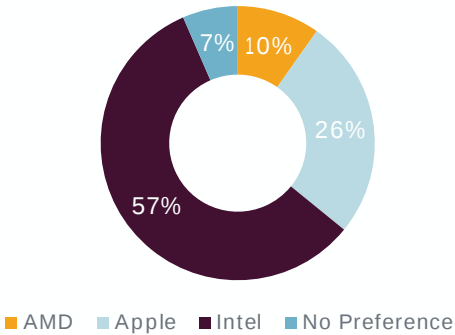
“Colleagues come to me to ask what I’ve heard and if something is hype or not. They ask my opinion on if they should wait for something new to come out as it will be much better or buy what is available today.”

- Average Age: 39
- Workstation Form Factor – Desktop Workstation (79%). One of highest % of mobile workstations (21% to avg. 15%)
- Works with a combination of onsite and remote (66%) indexing higher than others for onsite workers (14%)
- Considers themselves the primary decision maker, but views it as a collaborative process with IT and procurement
- Perceive that they are the primary decision maker at 100% in the Media and Entertainment vertical/segment

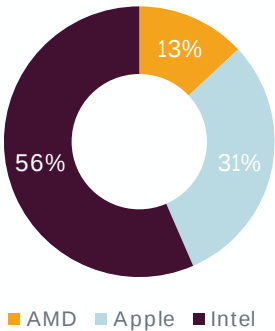
## PURCHASING BEHAVIOR

|                               |                                                                                                                                                                                                   |
|-------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Average PC Purchase Cycle     | • 2-4 years                                                                                                                                                                                       |
| Primary Purchase Driver       | <ul style="list-style-type: none"><li>• Existing products have become obsolete (34%)</li><li>• Technology refresh cycle (33%)</li><li>• Performance boost from new/other products (28%)</li></ul> |
| Key Purchase Criteria         | <ul style="list-style-type: none"><li>• Speed/Performance (61%), Memory (52%), Processor (50%)</li></ul>                                                                                          |
| Top Workstation Needs/Request | <ul style="list-style-type: none"><li>• Current system challenges (70%)</li><li>• Applications needed to run on the workstation (68%)</li></ul>                                                   |
| Personal Workstation          | <ul style="list-style-type: none"><li>• Intel (61%)</li><li>• Dell (28%)</li><li>• Apple (28%)</li></ul>                                                                                          |

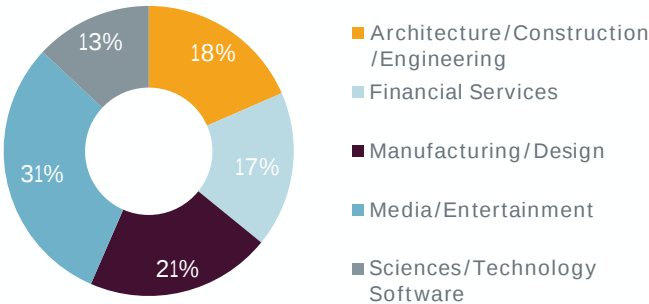
Preferred Processor



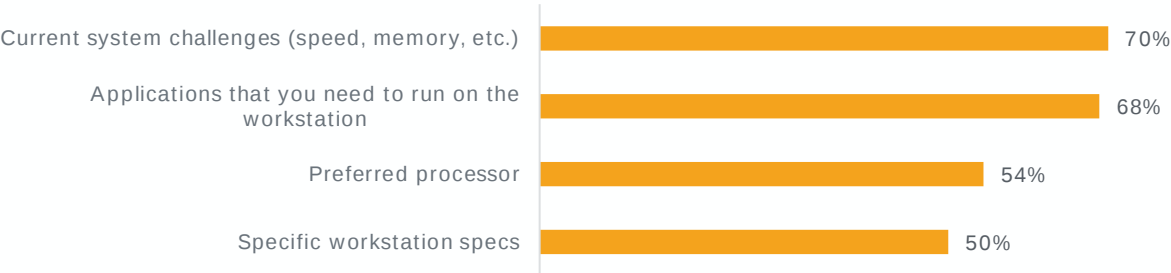
Purchased Processor



Industry Vertical

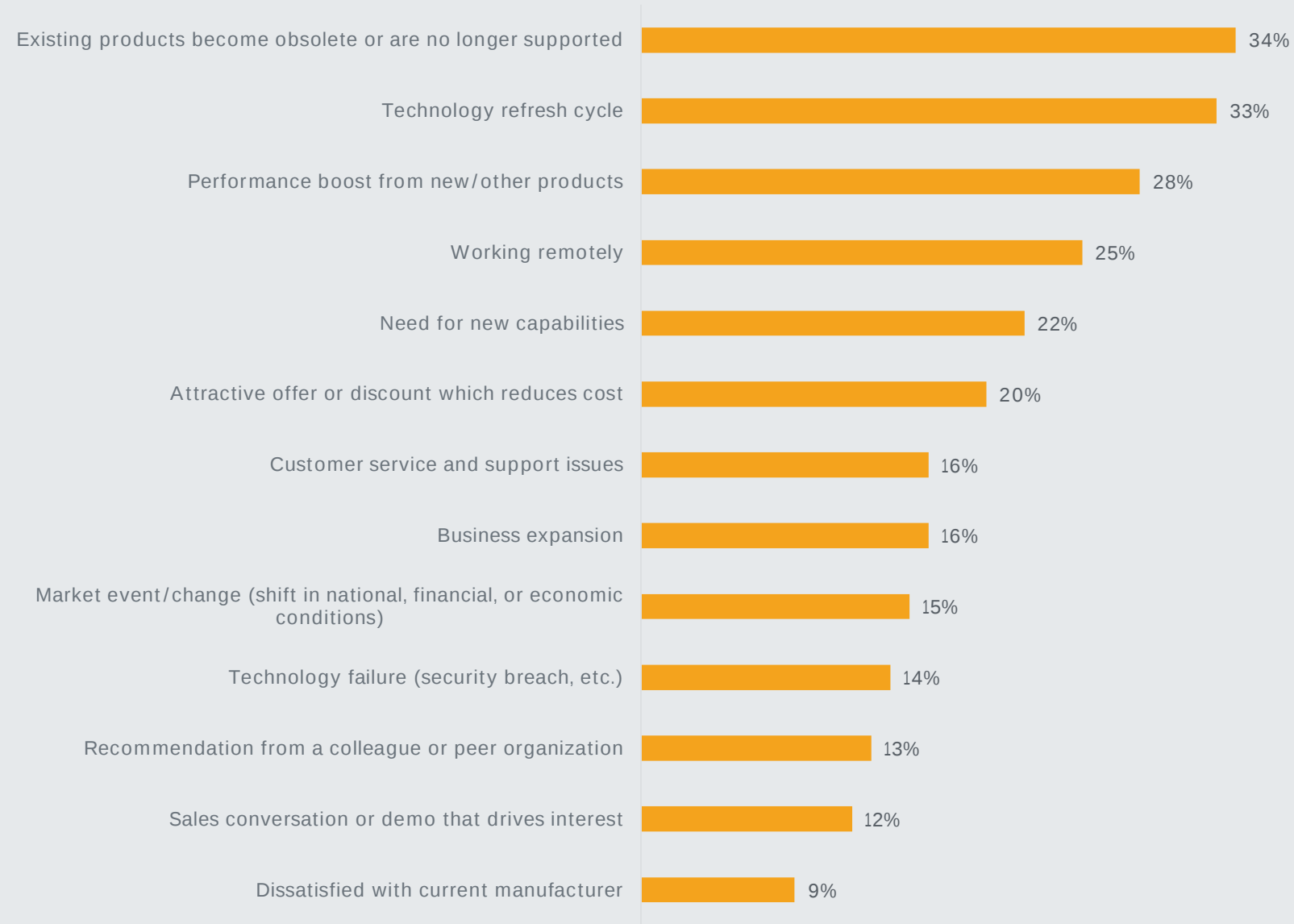


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# POWER END USER: REASONS FOR PURCHASING A WORKSTATION

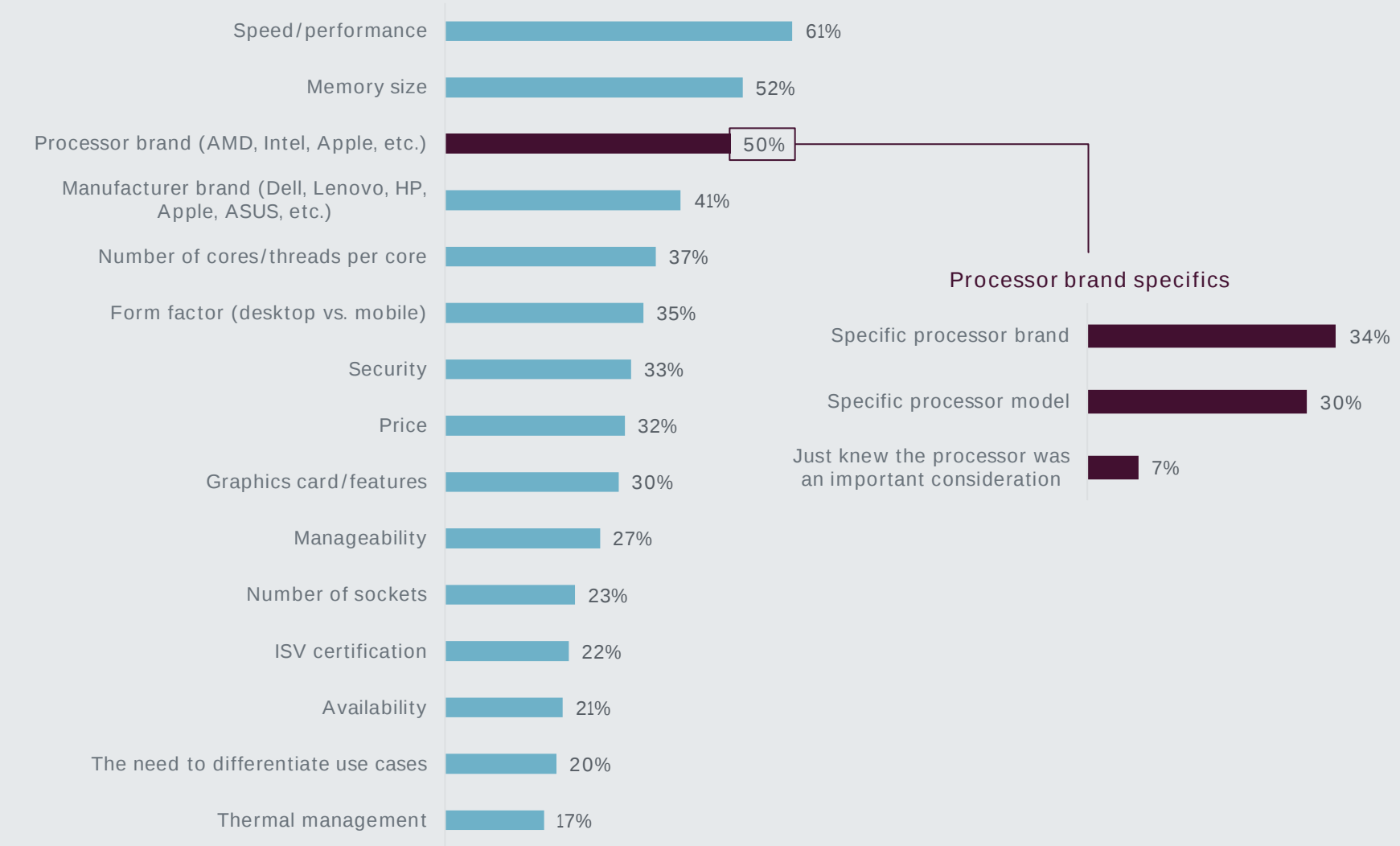
- Purchase to replace existing products that have become obsolete or are no longer supported, due to technology refresh cycles, and to get a performance boost
- Rank lower than other end users on:
  - Business expansion
  - Tech failure
  - Need for new capabilities, Performance boost
  - Dissatisfaction with current OEM



Q6. What are the most common reasons that you want or need to purchase a new workstation?  
Source: Dialog AMD Workstation Persona & Buyer's Journey Research, April 2022 - U.S.

# POWER END USER: WORKSTATION NEEDS PROVIDED TO IT & CRITERIA

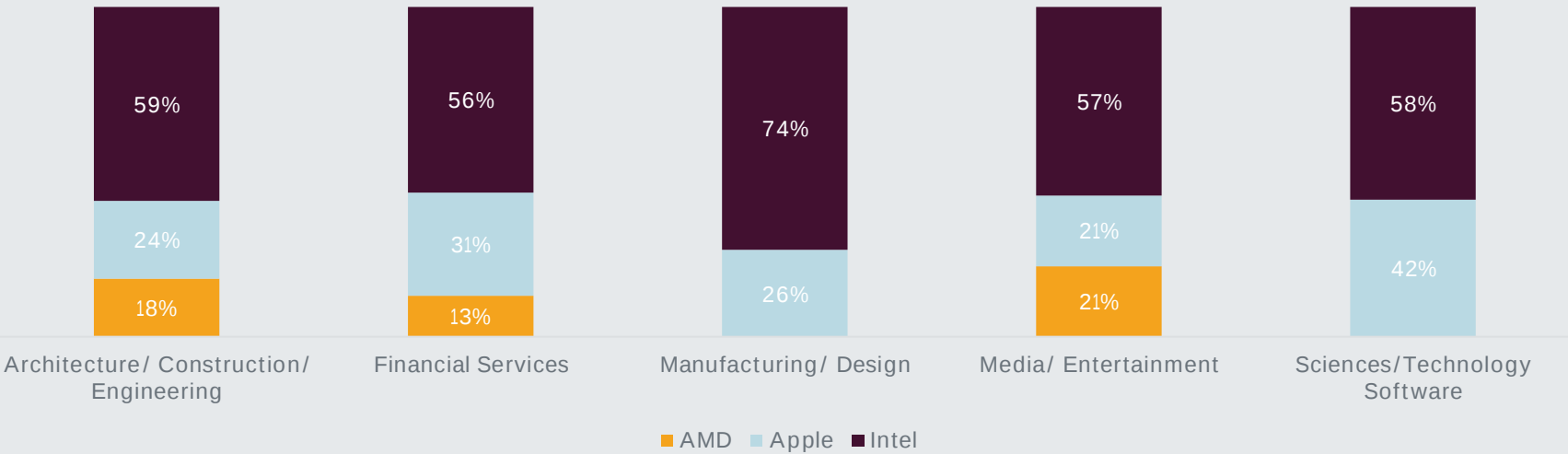
- Provide IT with current system change information and applications they need
- Speed/performance is both the top ranked criteria when starting buying process as well as top criteria overall
- Processor brand and OEM brand rank high as the #1 criteria, while memory size ranks high across the board
- Over-indexed on form factor vs. other personas – ties to the over-index on working remotely



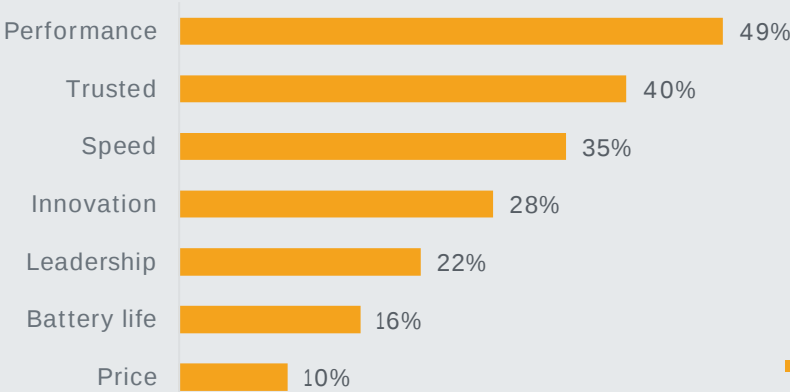
# POWER END USER: PROCESSOR PREFERENCE & PURCHASE

- Lowest percent that prefer an AMD processor
- Performance, trust, and speed are top reasons for purchasing processor brand
- Apple is gaining share with this audience, so AMD has an opportunity to appeal more at the application level
- Opportunity to capture 7% who have no processor preference

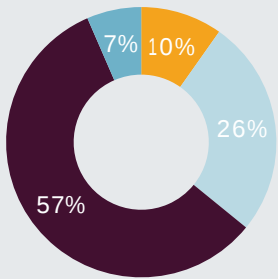
Current WS Processor



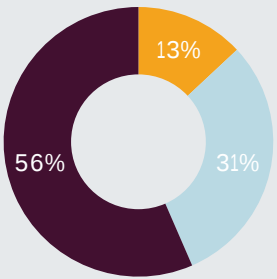
Top 2 reasons you purchased this processor brand



Preferred Processor



Purchased Processor

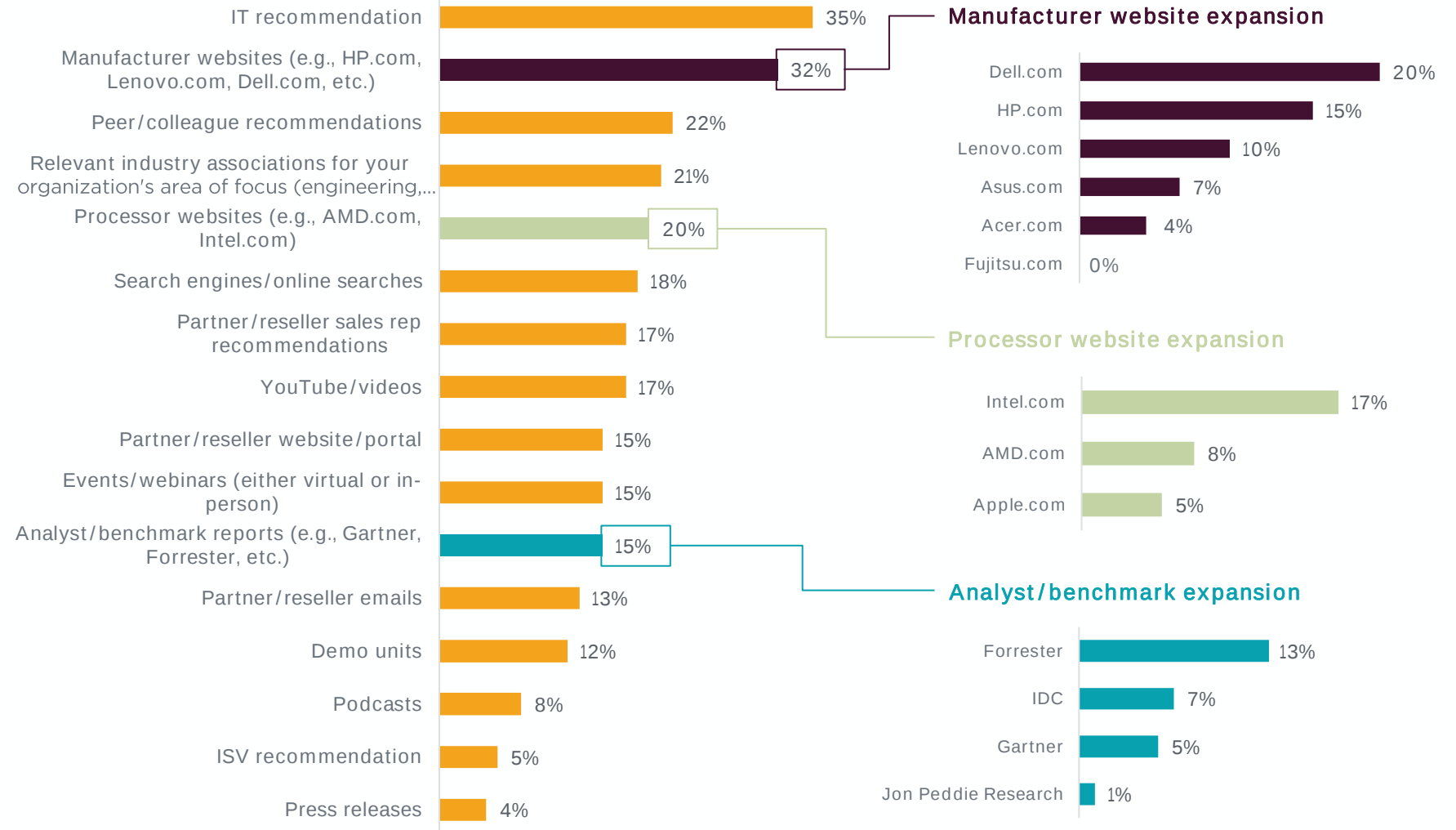


QS10. What brand of processor is in the PC/workstation that you primarily use?, Q4. Which processor brand is the most commonly purchased brand for workstations in your organization? Q4a. What are the top two reasons that you purchased this processor brand? Q5. Which processor brand would you prefer for the workstation you primarily use for work? Source: Dialog AMD Workstation Persona & Buyer's Journey Research, April 2022 - U.S.

# BUYER'S JOURNEY - POWER END USER

## AWARENESS CONTENT SOURCES

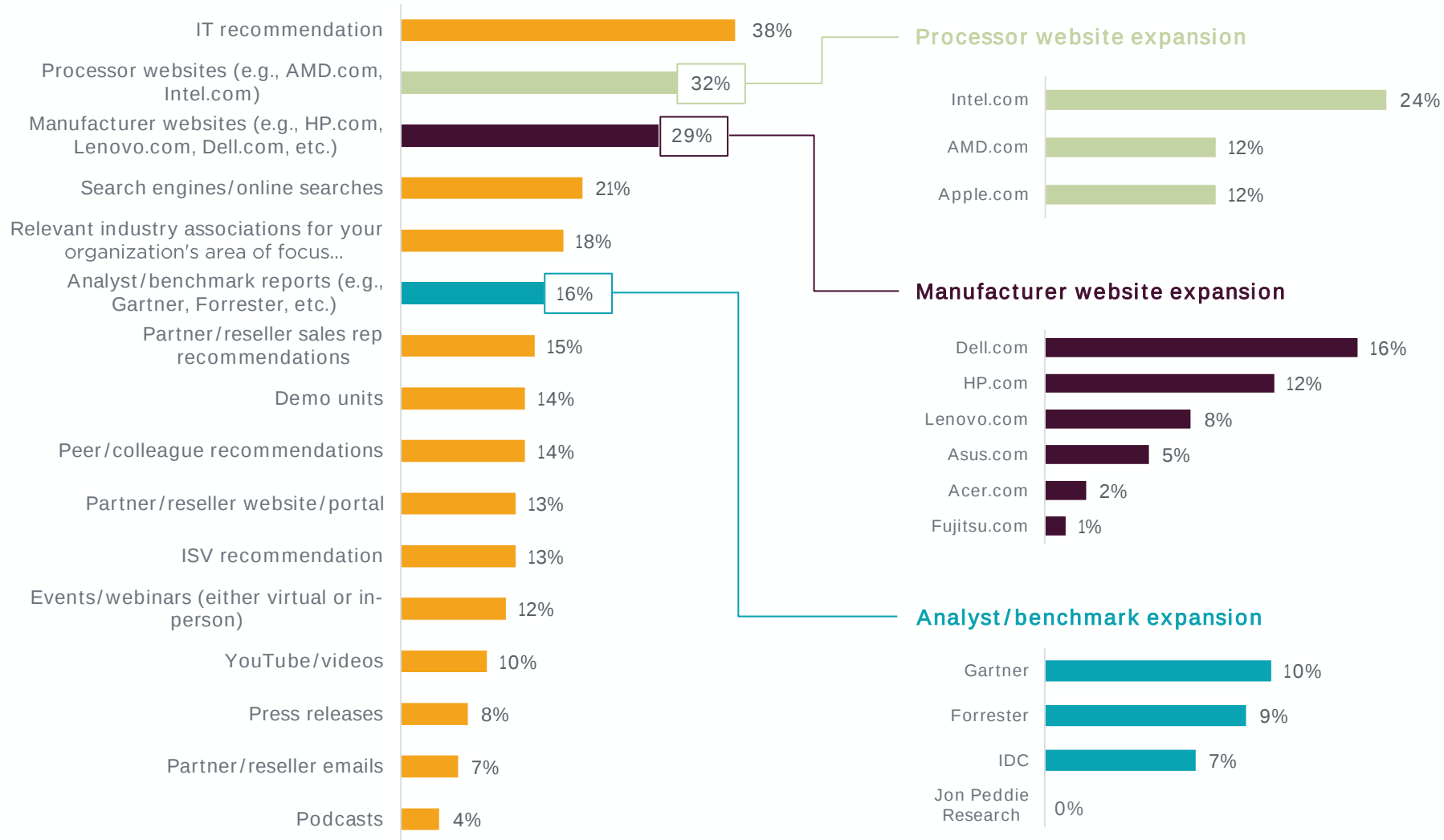
- IT recommendations and OEM websites rank high..
  - Dell.com is the preferred site followed by HP
- Well under-indexed on visiting AMD.com
- Over-indexed on use of analyst reports compared to other audiences with Forrester being preferred



# BUYER'S JOURNEY - POWER END USER

## CONSIDERATION CONTENT SOURCES

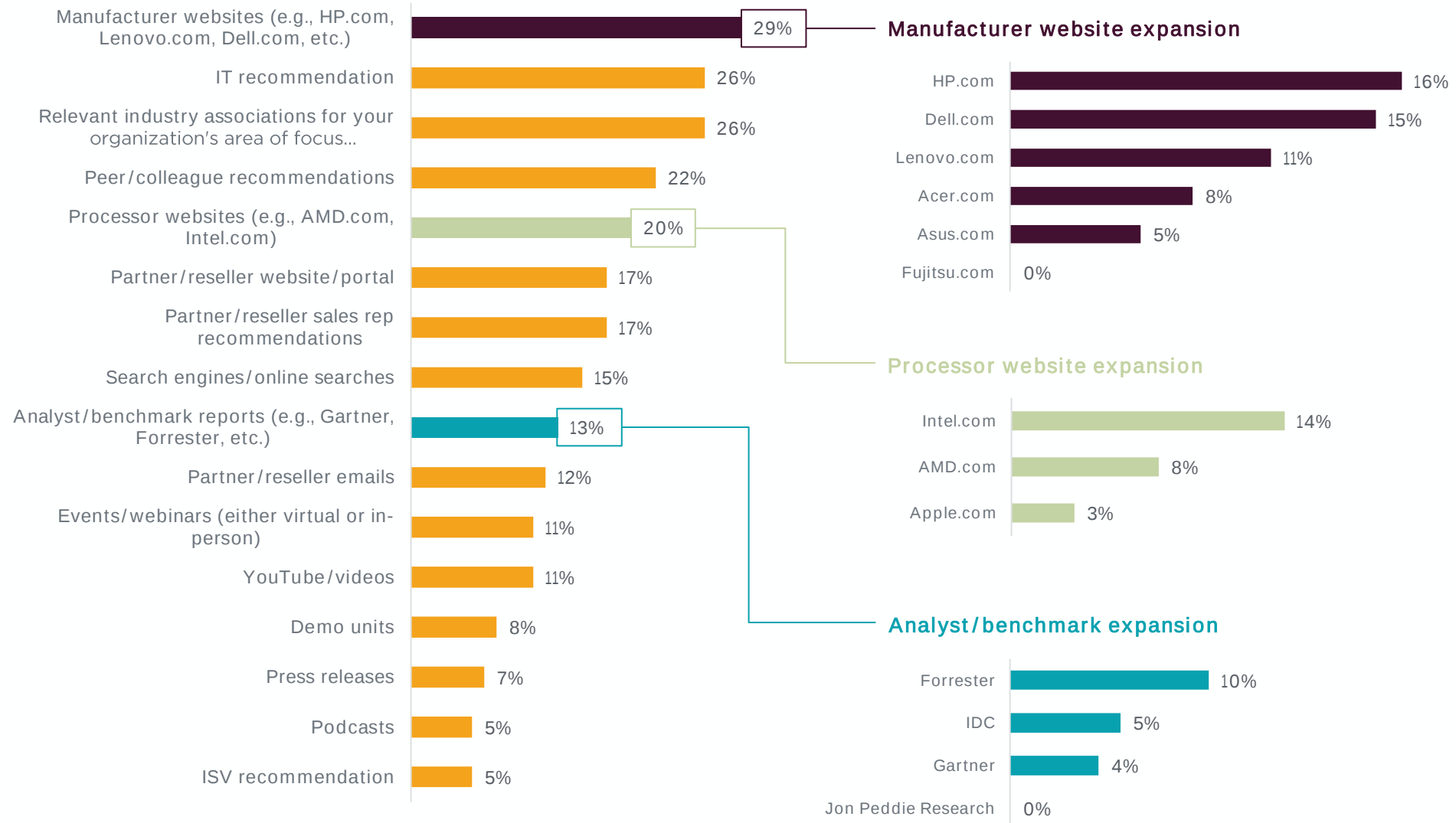
- IT recommendations increase in value during this phase
- Processor sites increase by 12% and search also becomes more relevant
- Intel remains the preferred site, with AMD and Apple becoming equal



# BUYER'S JOURNEY - POWER END USER

## PURCHASE CONTENT SOURCES

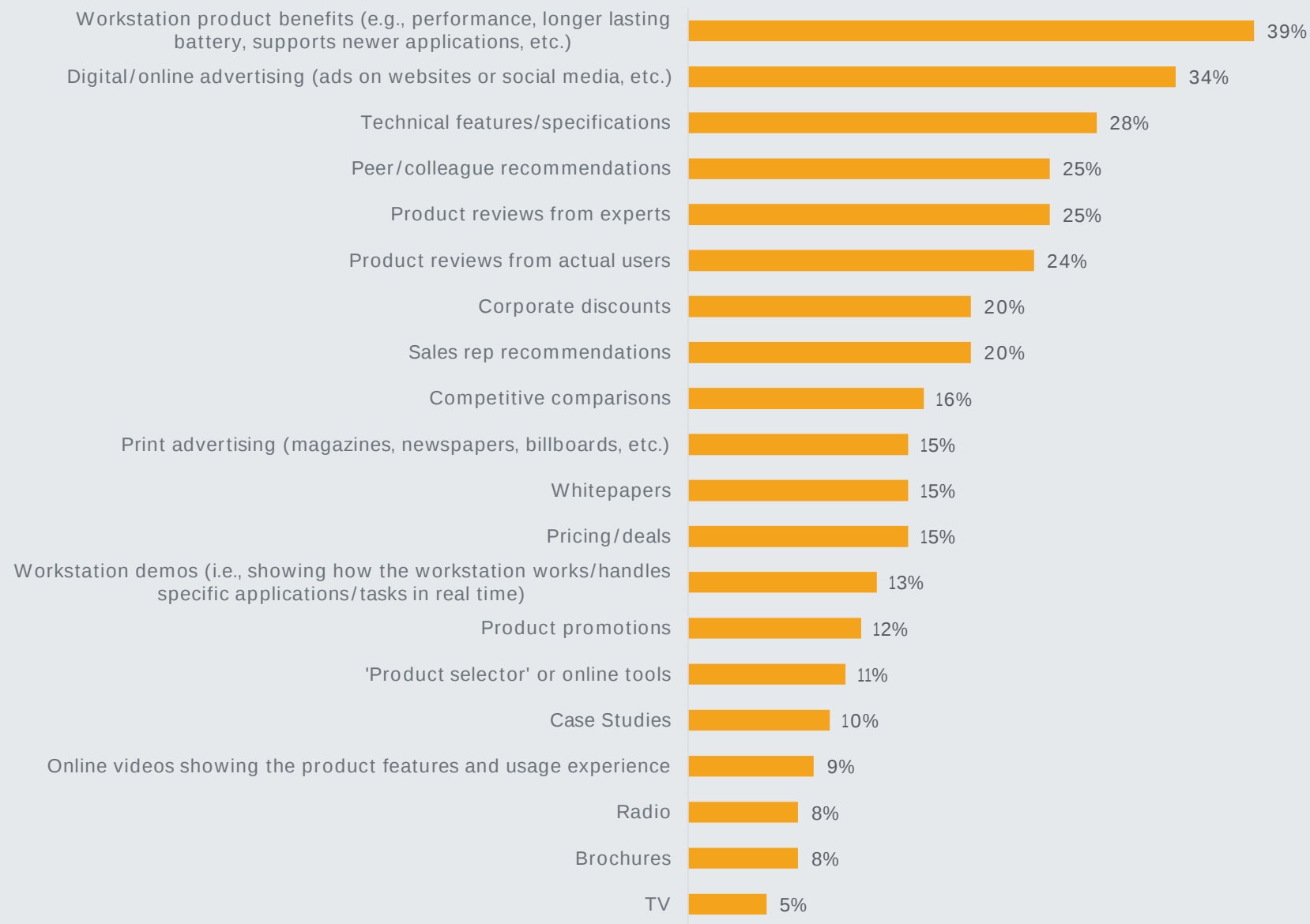
- Processor websites decline significantly from the consideration phase while partner/reseller/portals increase
- Relevant industry associations and peer recommendations become more important to review



Q10a. Thinking about the third phase of your buying process, where did you seek/gather information when you were beginning to define criteria/requirements for potential workstations to buy?  
 Source: Dialog AMD Workstation Persona & Buyer's Journey Research, April 2022 - U.S.

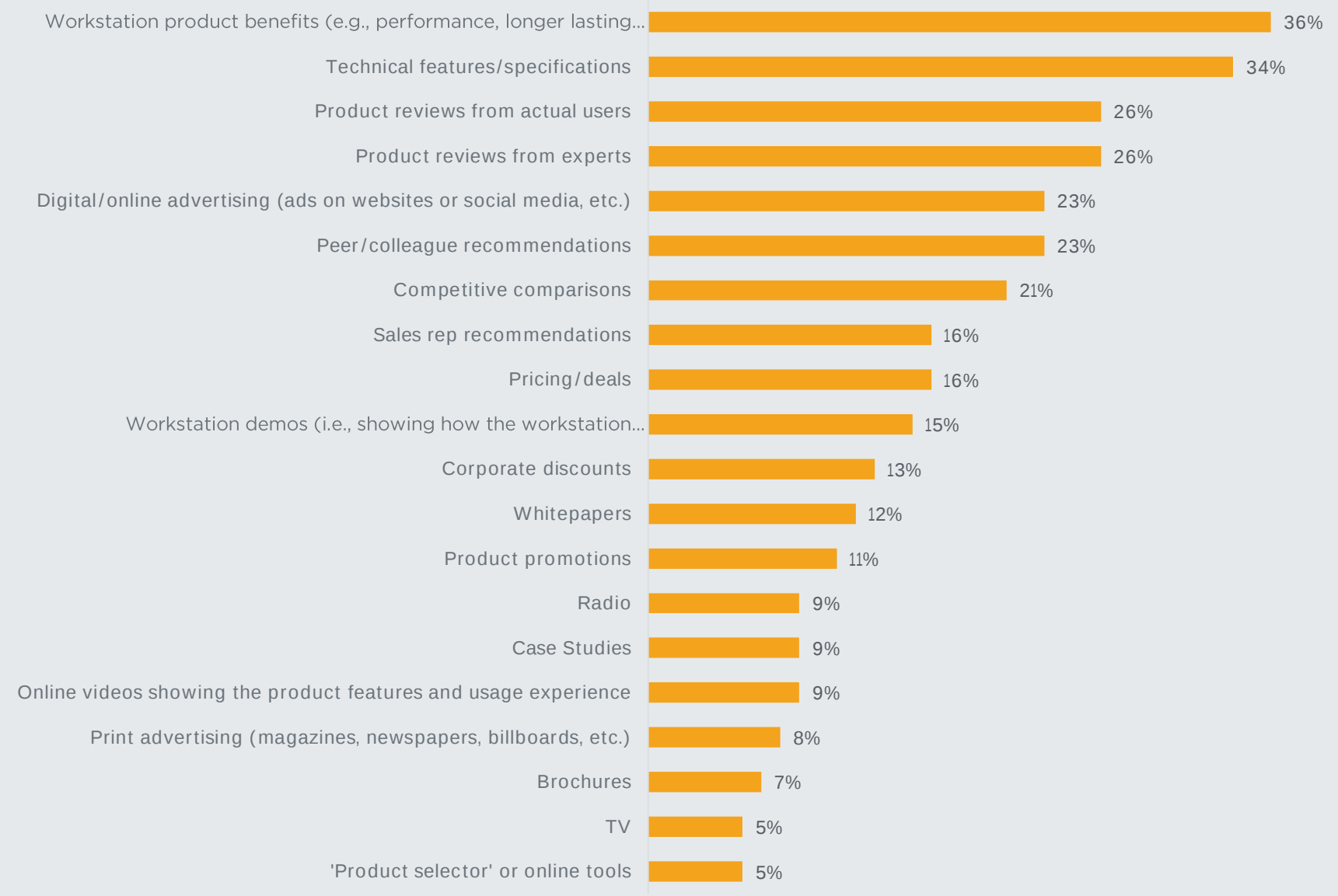
# POWER END USER: AWARENESS CONTENT TYPES

- Values workstation benefits, digital advertising, and tech specs
- Product reviews from experts, peer recommendations, and user reviews are important
- Over-index on product selector/online tools although still low
- Demos are surprisingly low for this persona in comparison to others



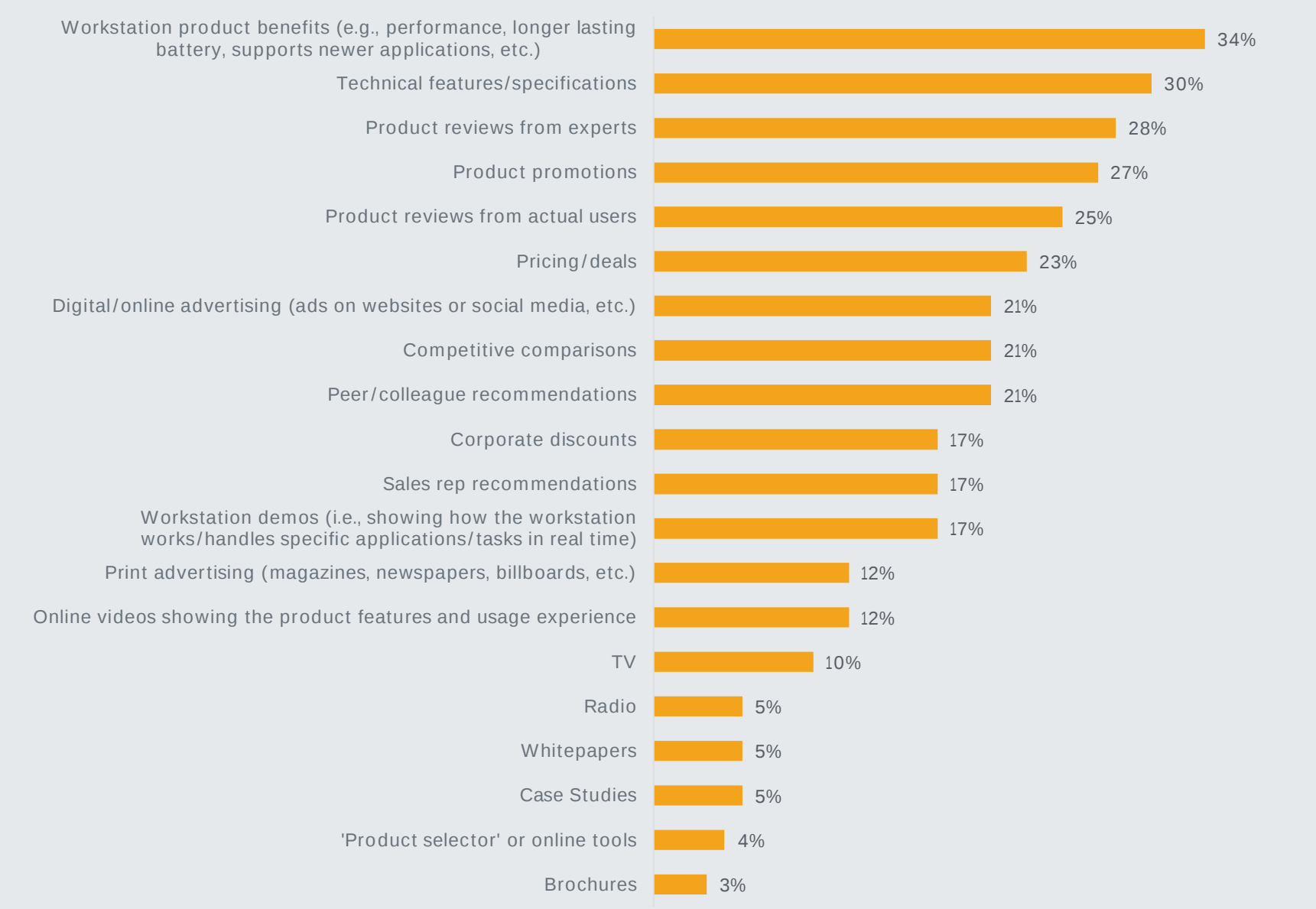
# POWER END USER: CONSIDERATION CONTENT TYPES

- Tech specs and corporate discounts increase in value while online tools decline
- Digital advertising and print advertising both decline



# POWER END USER: PURCHASE CONTENT TYPES

- Product reviews, product promotions, and pricing/deals increase in value
- Over-indexed on peer recommendations at this stage



# 3D Modeling & Design End User

Application/Output-Focused Across Verticals

Renee,  
3D Modeling Artist, Film



# 3D MODELING END USER

Distinct purchasing behaviors across all verticals/segments at the application level.

## Meet Renee, 3D Modeling Artist, Film

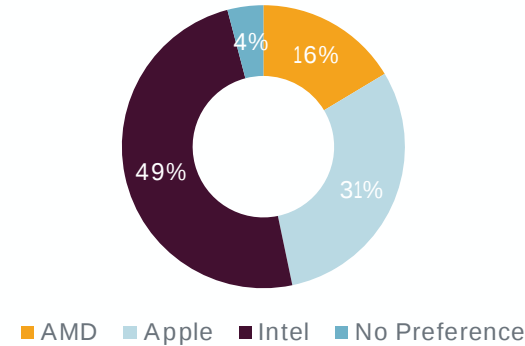
"I do all the design myself. Suspension, chassis, drivetrain, CFD, all kinds of finite element analysis. So there's usually a whole bunch of things that I'm doing at once, for example, I could be running CFD, and I still need to be working on other things at the same time while the simulation is running for several hours."

- Average Age: 41 (*average age for youngest and oldest of the spectrum*)
  - *There is a small group of young up and comers in this group, and a larger than avg group of 49-60, carrying years of experience*
- Workstation Form Factor – Desktop Workstation (87%)
- Works with a combination of onsite and remote, (72%) but has one of the lowest percentages of remote (8%)
- Considers themselves the primary decision maker, providing team with application-specific specs required
- Collaborates with IT, procurement, and accounting during the purchasing process

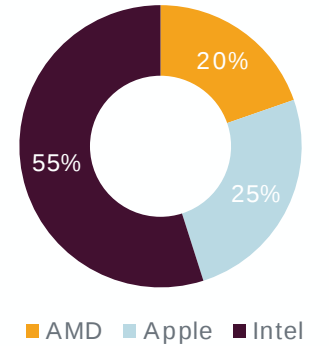
## PURCHASING BEHAVIOR

|                               |                                                                                                                                                                             |
|-------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Average PC Purchase Cycle     | • 2-4 years                                                                                                                                                                 |
| Primary Purchase Driver       | <ul style="list-style-type: none"><li>• Technology refresh cycle (40%)</li><li>• Need for new capabilities (38%)</li><li>• Existing product become obsolete (35%)</li></ul> |
| Key Purchase Criteria         | • Speed/Performance (64%), Memory (54%), Processor (52%)                                                                                                                    |
| Top Workstation Needs/Request | <ul style="list-style-type: none"><li>• Applications needed to run on the workstation (80%)</li><li>• Specific workstation specs (71%)</li></ul>                            |
| Personal Workstation          | <ul style="list-style-type: none"><li>• Intel (55%)</li><li>• Apple (27%)</li><li>• Dell (26%)</li></ul>                                                                    |

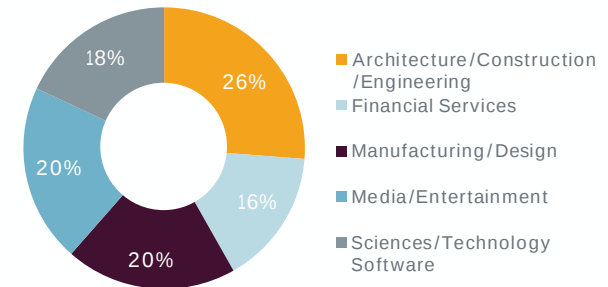
Preferred Processor



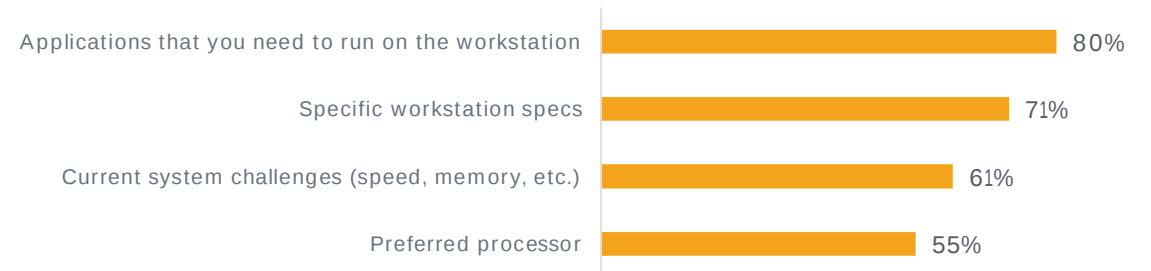
Purchased Processor



Industry Vertical

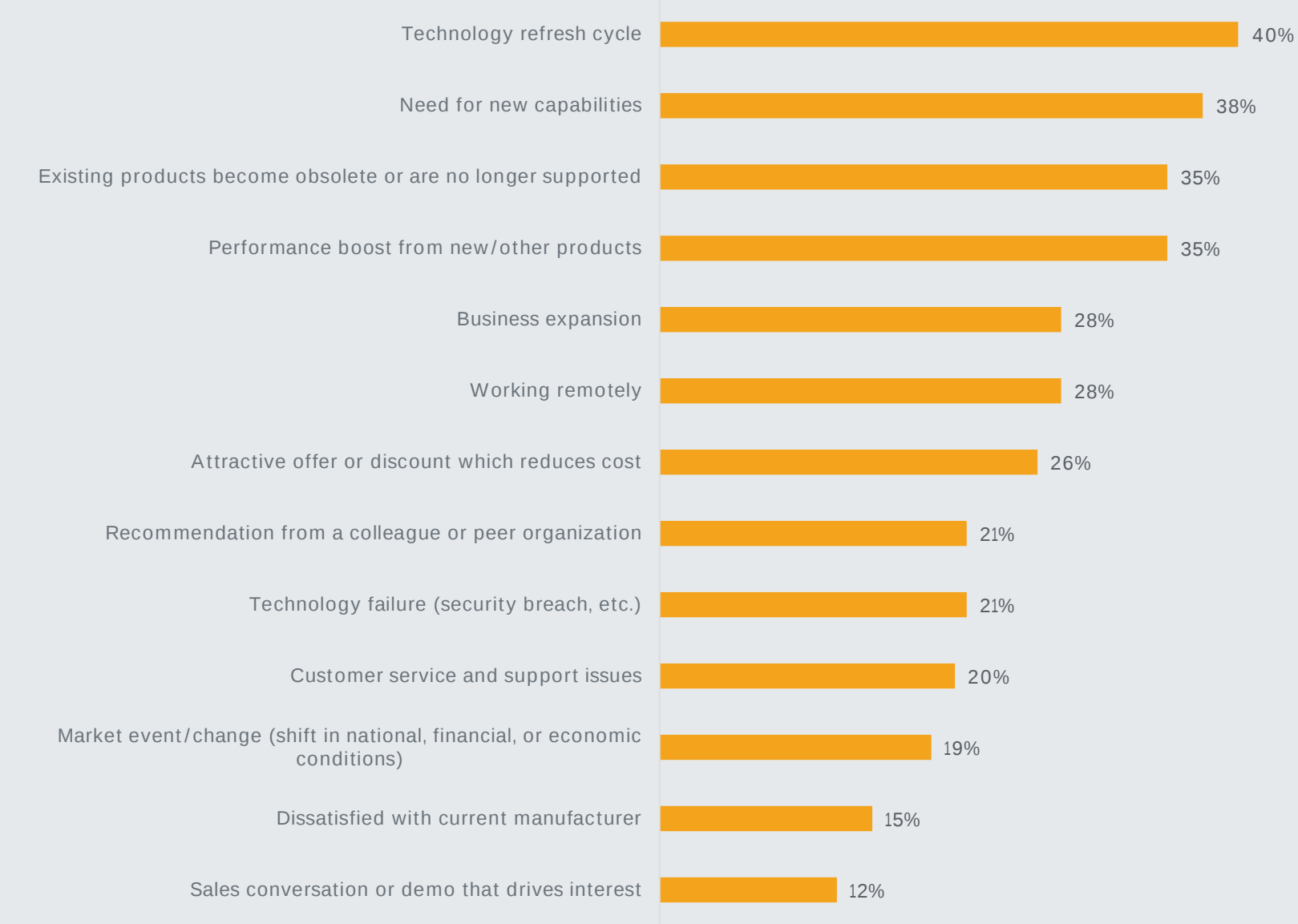


Info provided with request



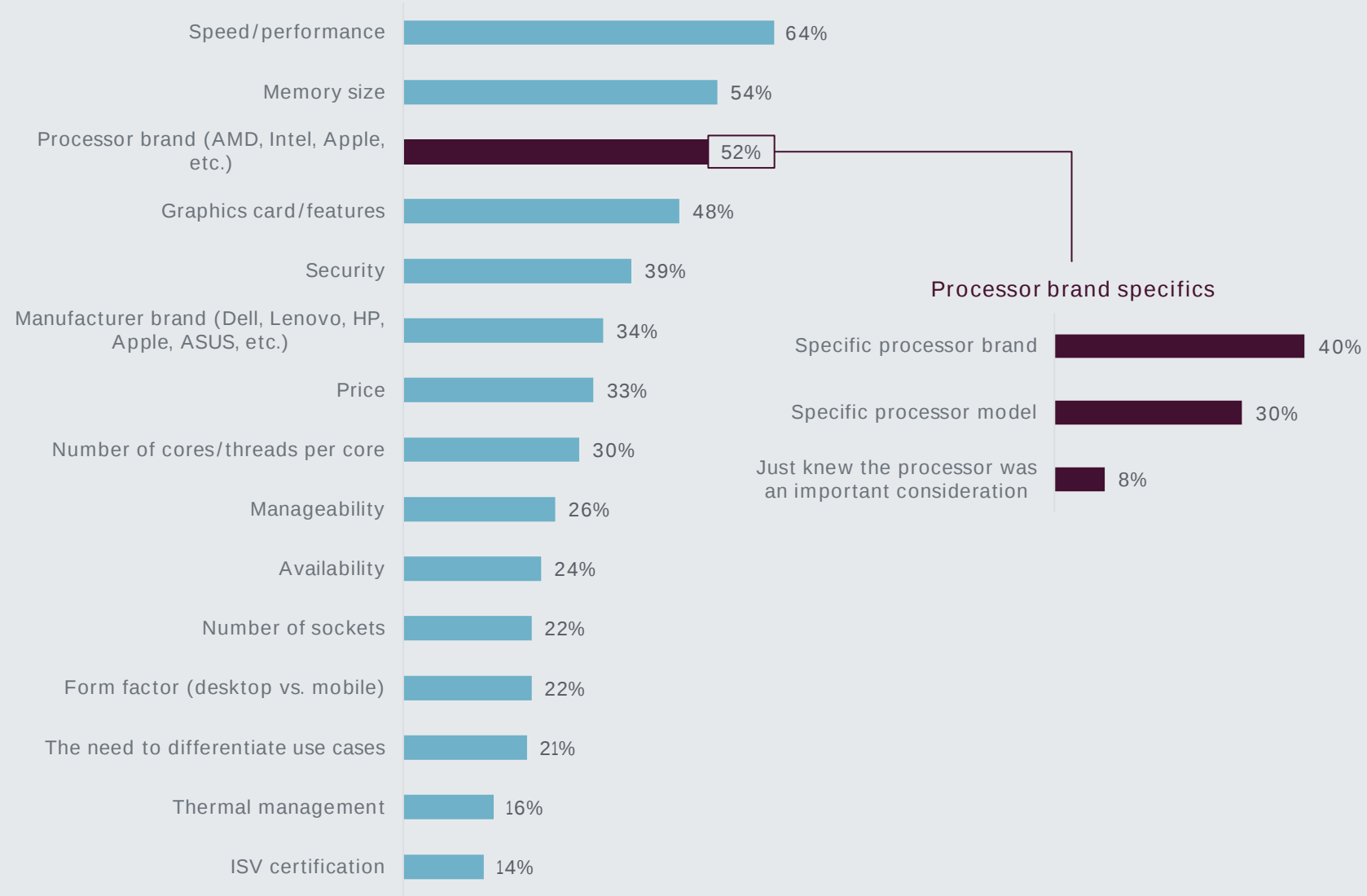
# 3D MODELING & DESIGN: REASONS FOR PURCHASING A WORKSTATION

- Purchases due to technology refresh cycles, a need for new capabilities, and performance boost as well as product being no longer supported
- Over-indexed on business expansion, attractive offer, and recommendation from colleague
- Highest persona likely to be running multiple applications - 3D and CAD, Simulation and Virtual Reality, etc.



# 3D MODELING & DESIGN: WORKSTATION NEEDS PROVIDED TO IT & CRITERIA

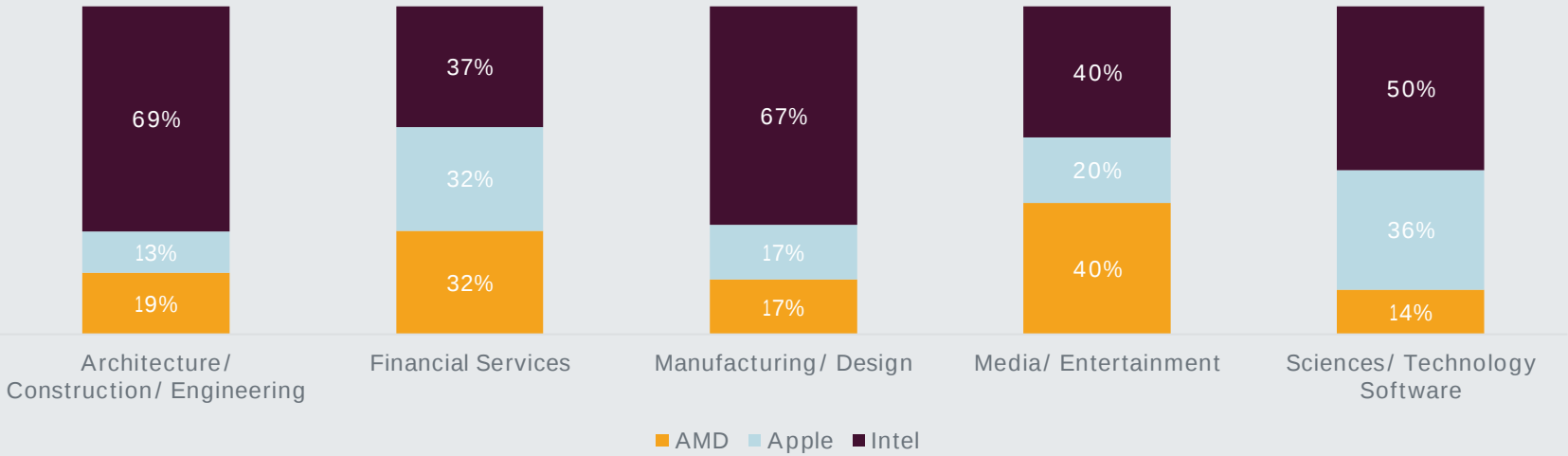
- Supply IT with the applications as well as tech specs
- By far prioritize speed/ performance as the #1 priority when starting their process and overall
- Security and processor brands rank high as the top criteria although security ranks low overall
- Group with the highest interest in graphics card/features



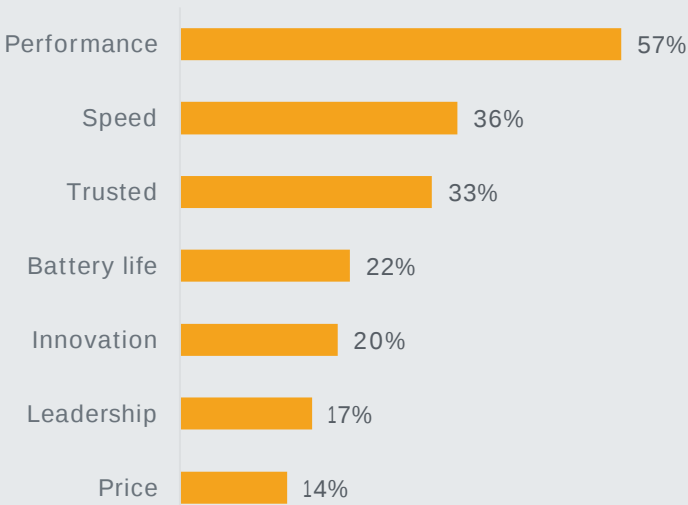
# 3D MODELING & DESIGN: PROCESSOR PREFERENCE & PURCHASE

- Highest ranking of performance compared to others
  - Speed and trust have a significant lag
- Highest persona favoring AMD compared to other personas

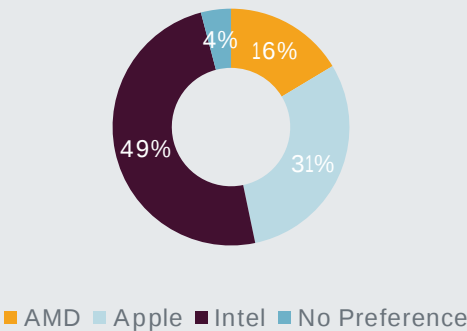
Current WS Processor



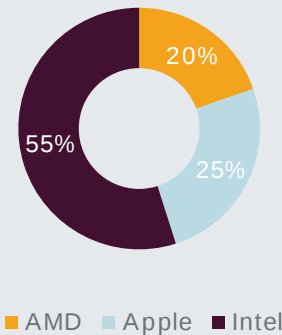
Top 2 reasons you purchased this processor brand



Preferred Processor



Purchased Processor

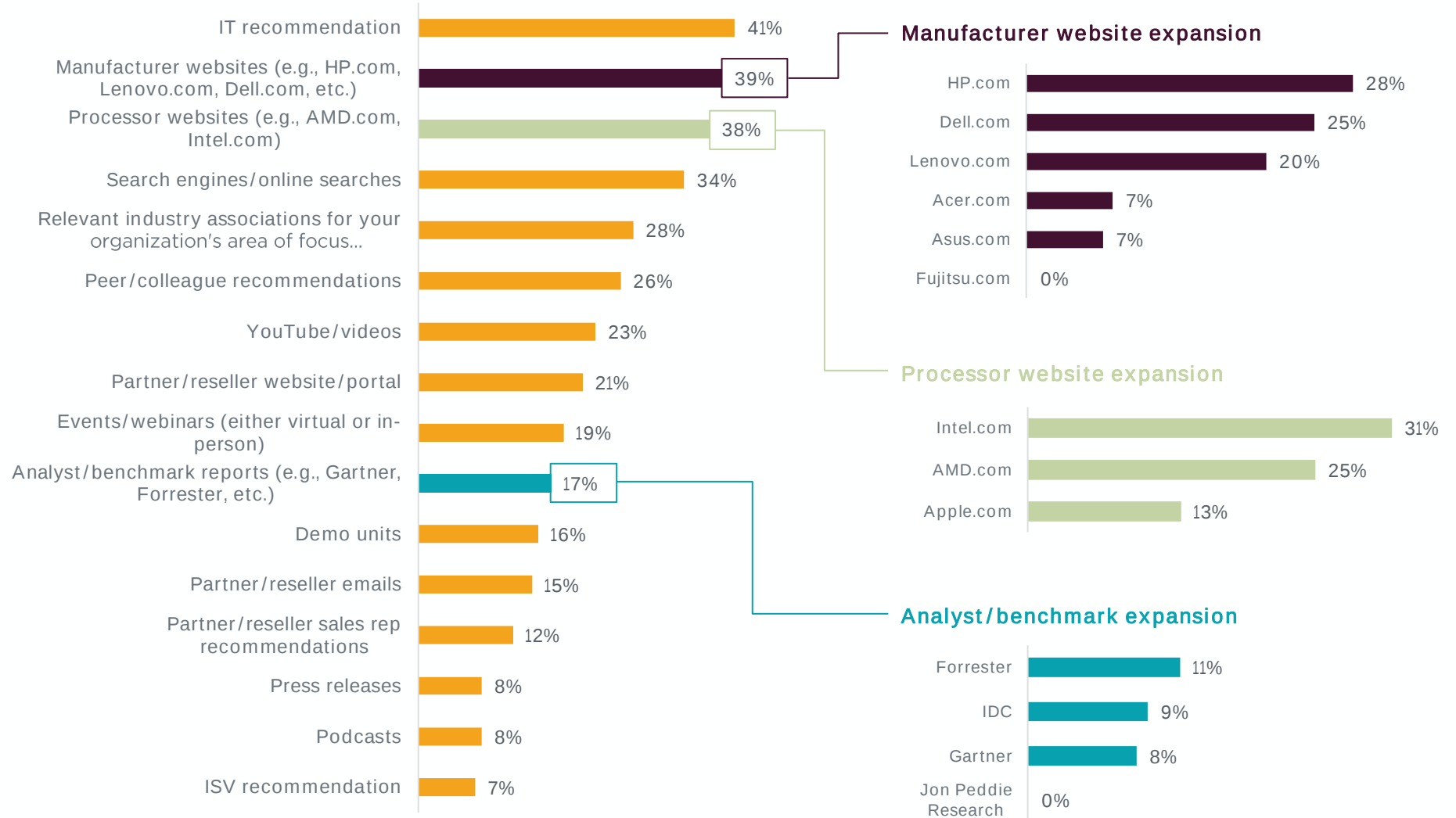


QS10. What brand of processor is in the PC/workstation that you primarily use?, Q4. Which processor brand is the most commonly purchased brand for workstations in your organization? Q4a. What are the top two reasons that you purchased this processor brand? Q5. Which processor brand would you prefer for the workstation you primarily use for work? Source: Dialog AMD Workstation Persona & Buyer's Journey Research, April 2022 - U.S.

# BUYER'S JOURNEY- 3D MODELING & DESIGN

## AWARENESS CONTENT SOURCES

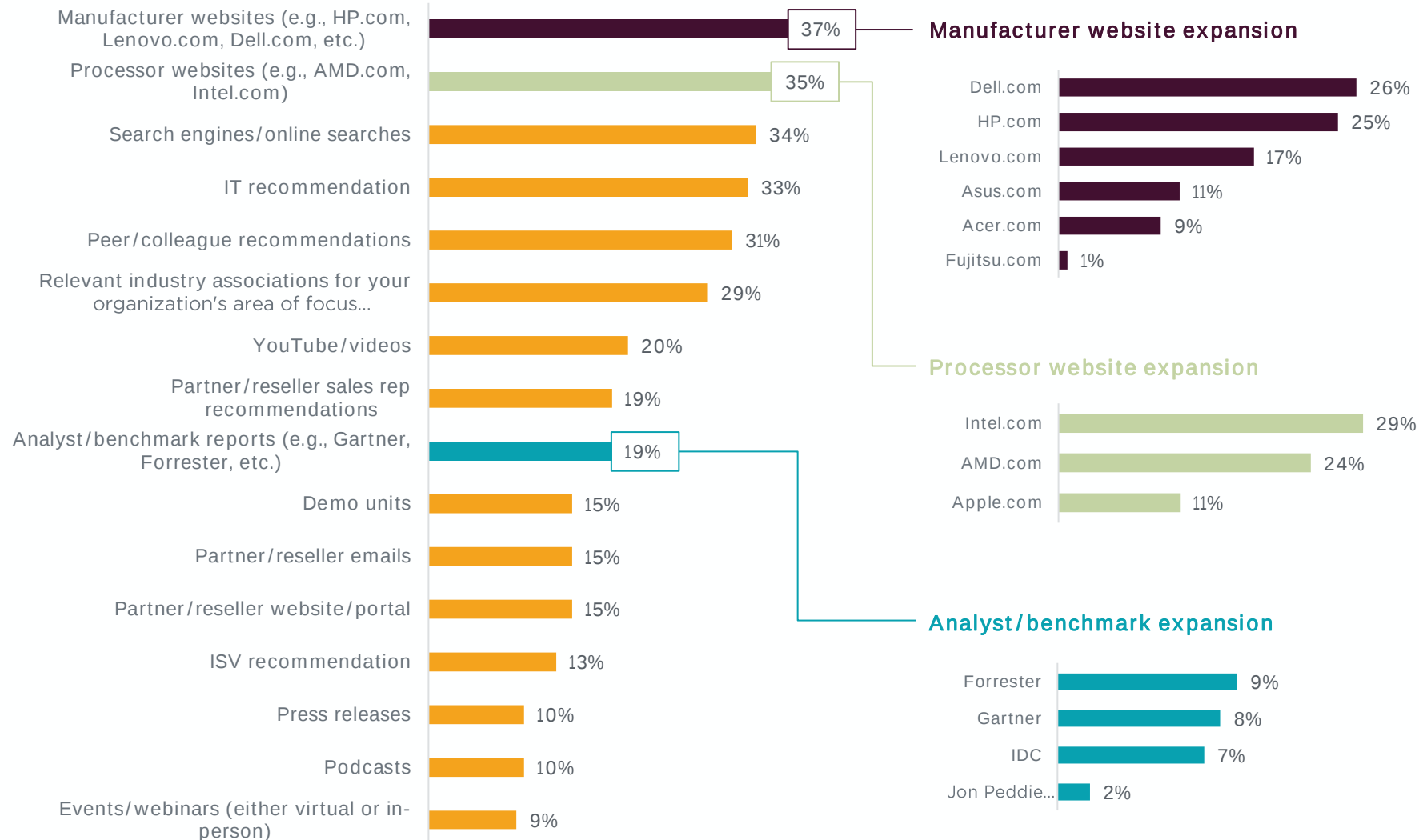
- Over-indexed on processor sites and associations
- Lightly more interested in demos
- For OEMs, HP is more favorable than Dell
- AMD is closer to Intel than other personas, with Apple.com being significantly less valued



# BUYER'S JOURNEY - 3D MODELING & DESIGN

## CONSIDERATION CONTENT SOURCES

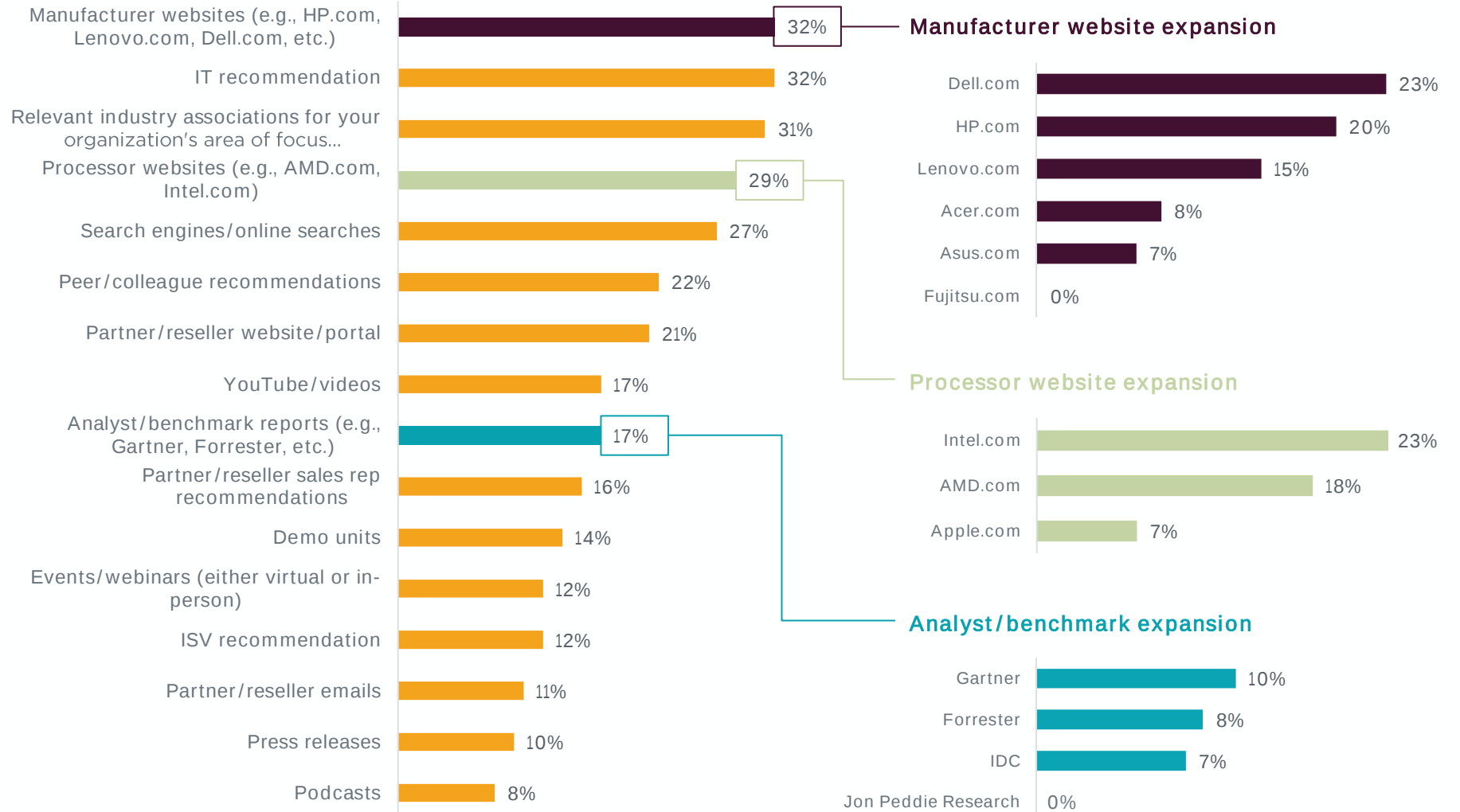
- Dell slightly surpasses HP during this stage and AMD gains preference moving closer to Intel
- Peer/colleague recommendations become more significant
- Search, IT recommendations, and peer recommendations are valued



# BUYER'S JOURNEY - 3D MODELING & DESIGN

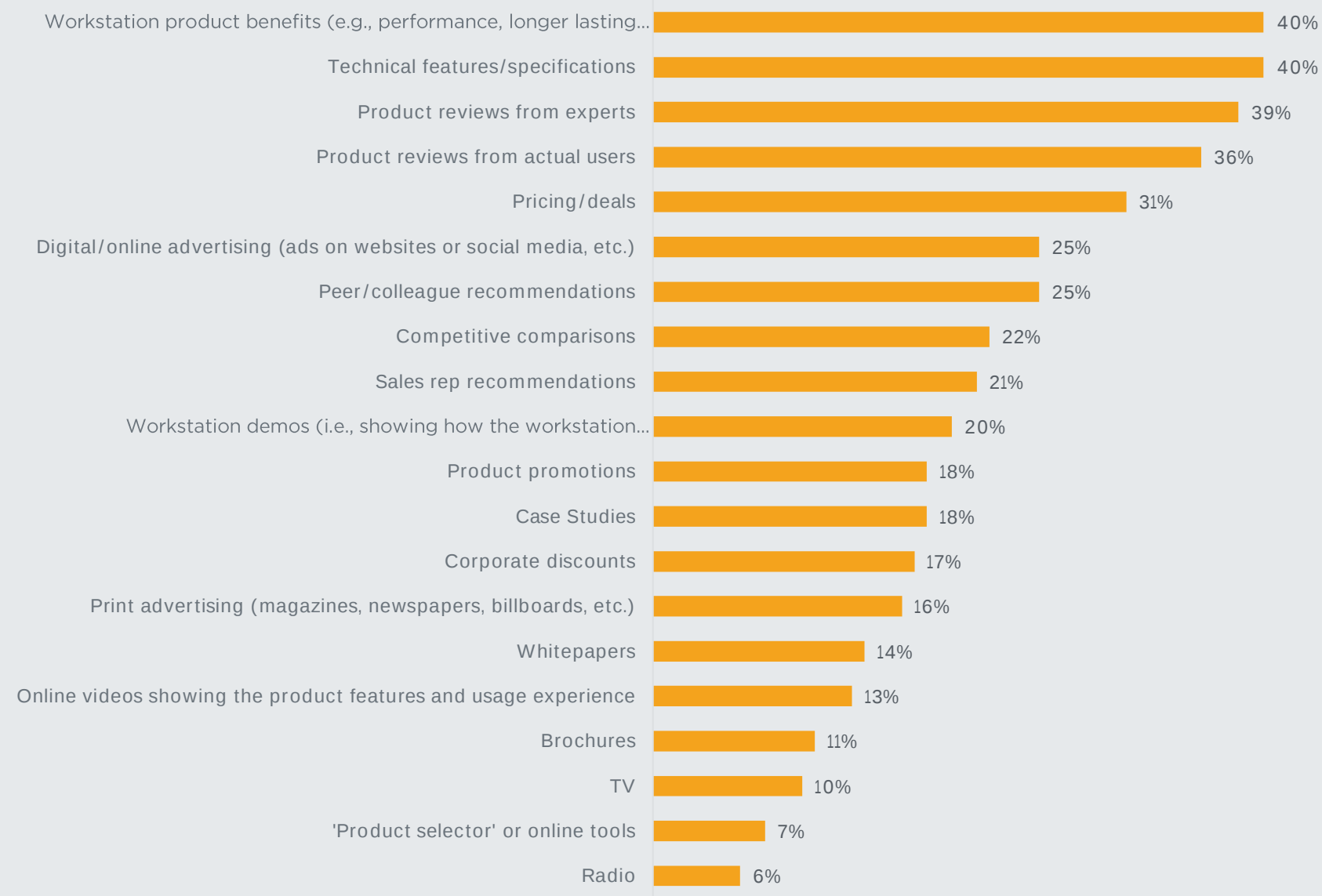
## PURCHASE CONTENT SOURCES

- Relevant industry associations become increasingly important
- IT recommendations and OEM sites continue to be valued



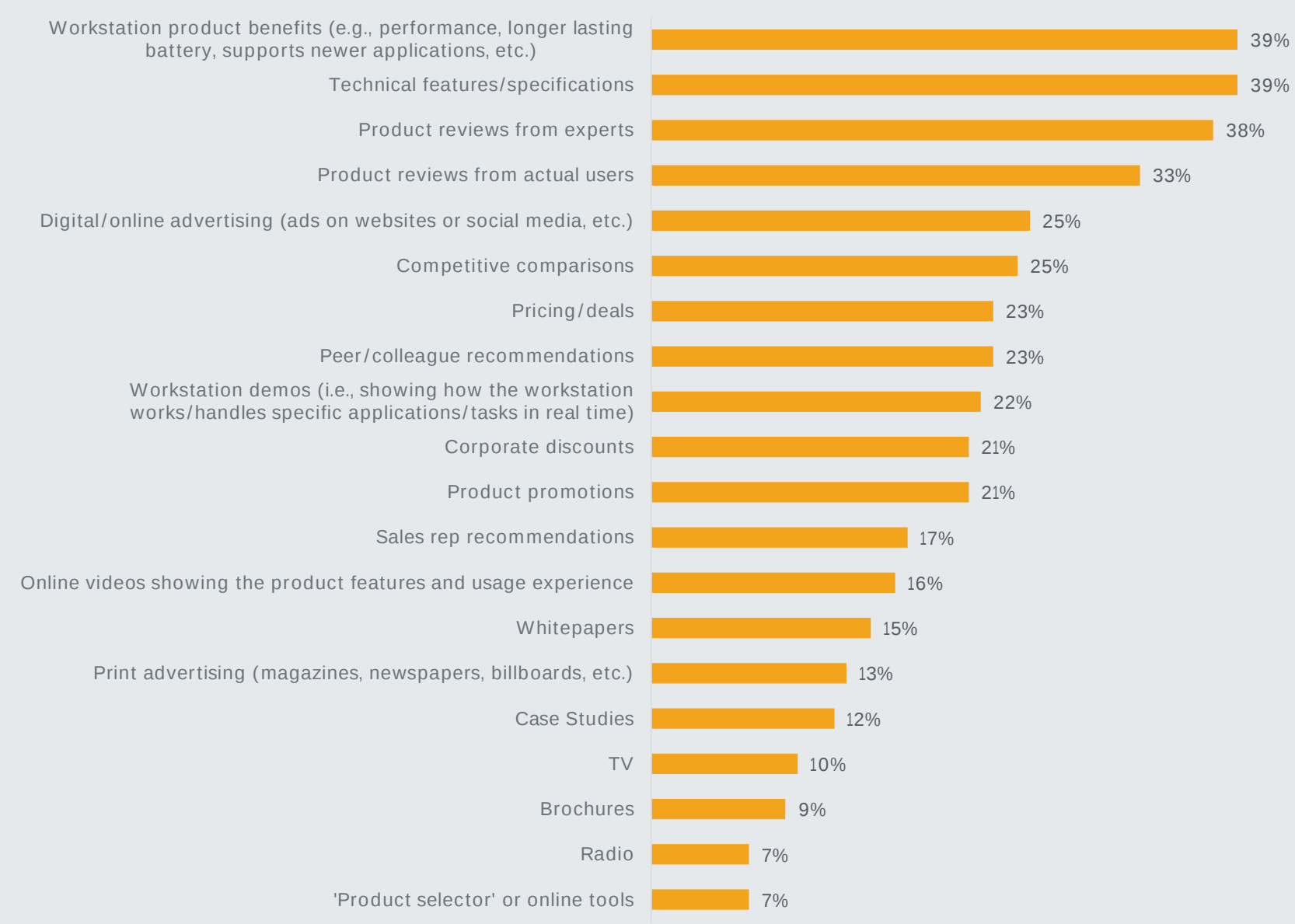
# 3D MODELING & DESIGN: AWARENESS CONTENT TYPES

- Tech specs, product benefits, and expert and user product reviews are preferred.
- Reviews are slightly above average
- Digital advertising ranks high along with peer recommendations



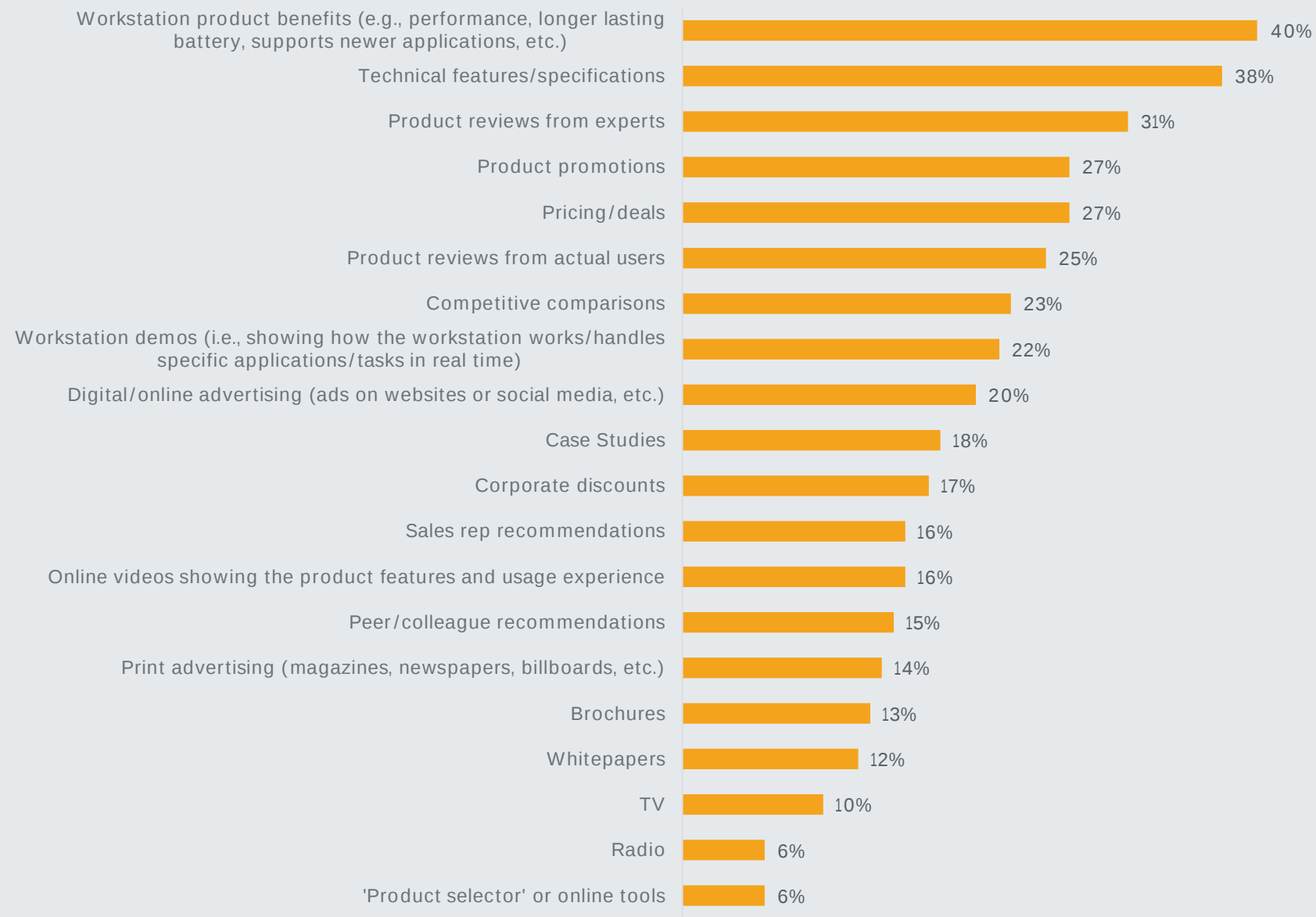
# 3D MODELING & DESIGN: CONSIDERATION CONTENT TYPES

- Tech specs and product benefits continue to be preferred along with expert and user reviews
- Slightly more interested in whitepapers
- Interested in online videos showing the product and usage experience (actual demo units are preferred)
- Digital advertising remains consistent



# 3D MODELING & DESIGN: PURCHASE CONTENT TYPES

- Product benefits have a minor increase while user reviews decline
- Pricing deals and product promotions become increasingly important
- Small group over-indexes on case studies and whitepapers



# XL/Large ITDM

Jim,  
Chief Information Officer



# XL/LARGE ITDM

## Meet Jim, Chief Information Officer

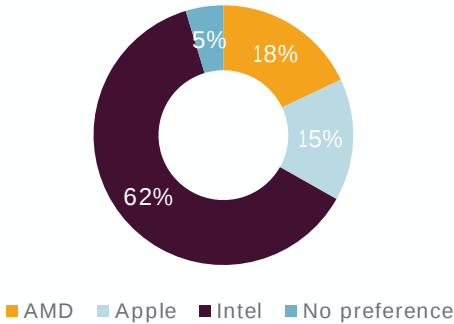
“It’s a collaborative autocracy. Local and global strategy groups set the foundation for selection standards. Business units have put their stamp of approval on the recommendations when they come back. Makes exceptions more difficult.”

- Average Age: 41
- International: 23%
- Company running at least 3 data intensive applications.
- Top Applications: Data Science (70%), Software Dev. (61%), 3D Modeling & Design (59%)
- Other groups play a role in purchasing, but IT holds the primary authority for all products in the organization
- Higher than average percent of remote workers (42% vs 35% for Small-Med)
- Final decisions more affected by contracts, pricing (34%)

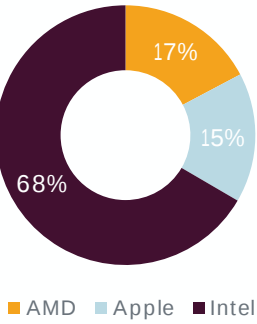
## PURCHASING BEHAVIOR

|                                               |                                                                                      |
|-----------------------------------------------|--------------------------------------------------------------------------------------|
| Average Purchase Cycle                        | • 1x year                                                                            |
| Journey Duration                              | • 67 days (least amount of time spent during purchasing phase at 18 days)            |
| Primary Purchase Drivers                      | • Speed/Performance (60%), Processor Brand (57%), Security (49%)                     |
| Top Workstation Purchase Challenges           | • Supply chain issues (29%)<br>• How to identify the best product for the task (28%) |
| % That Share Decision Making                  | • 17%                                                                                |
| Top 2 Reasons for Purchasing Processor Brand  | • Performance (60%), Trusted (38%)                                                   |
| Moving to Advanced Cloud Computing (off prem) | • 33%                                                                                |
| Top Purchase Channel                          | • OEM - Dell (75%)<br>• Distributor - TechData (74%)<br>• Reseller - CDW (63%)       |

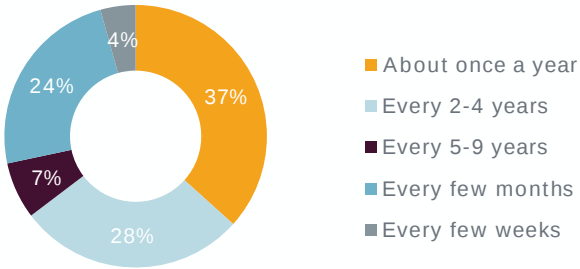
## Processor preferred



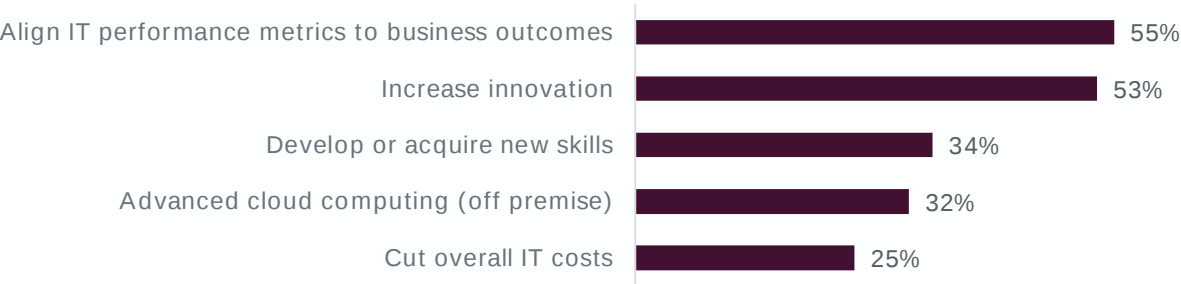
## Processor purchased



## Purchase frequency



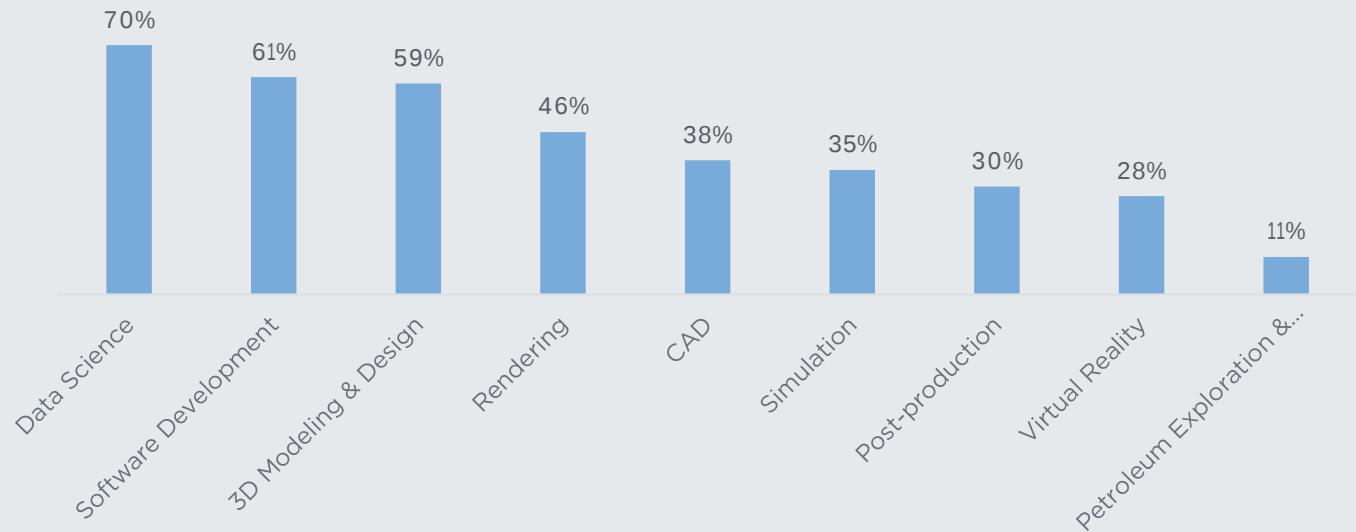
## Top tech priorities



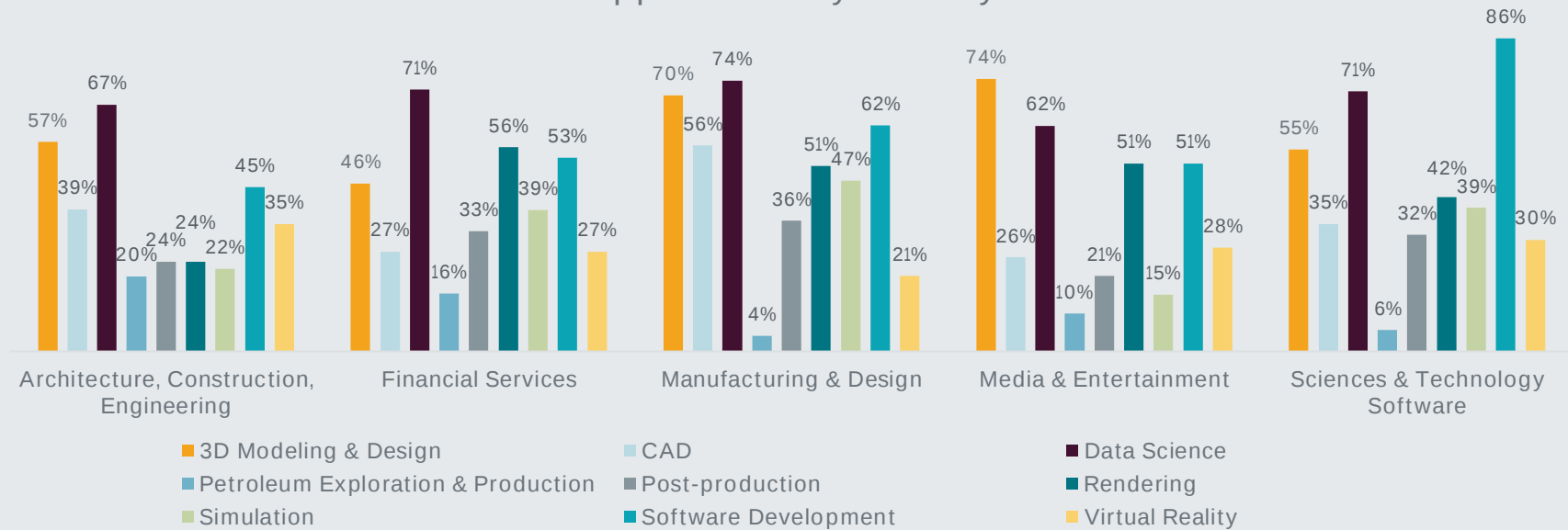
# XL/L ITDM: APPLICATIONS/ USAGE BY SEGMENT

- Data Science ranked high across all verticals
- Software Dev averaged second with 3D Modeling & Design third
- Sciences & Technology Software over-indexed for Software Dev
- Petroleum Exp. & Prod extremely low in Manufacturing & Design and Sciences & Tech Software

% of XL/Large companies using app



Applications by industry



# XL/L ITDM: END USER INVOLVEMENT

- Play a major role at the beginning (61%)
- Continue to drop in involvement throughout process to a little more than half
- Processor input scored highest for input shared with IT
- 8% less involved than the Media & Ent. vertical in the final stage

When are your End Users involved in your purchase process?



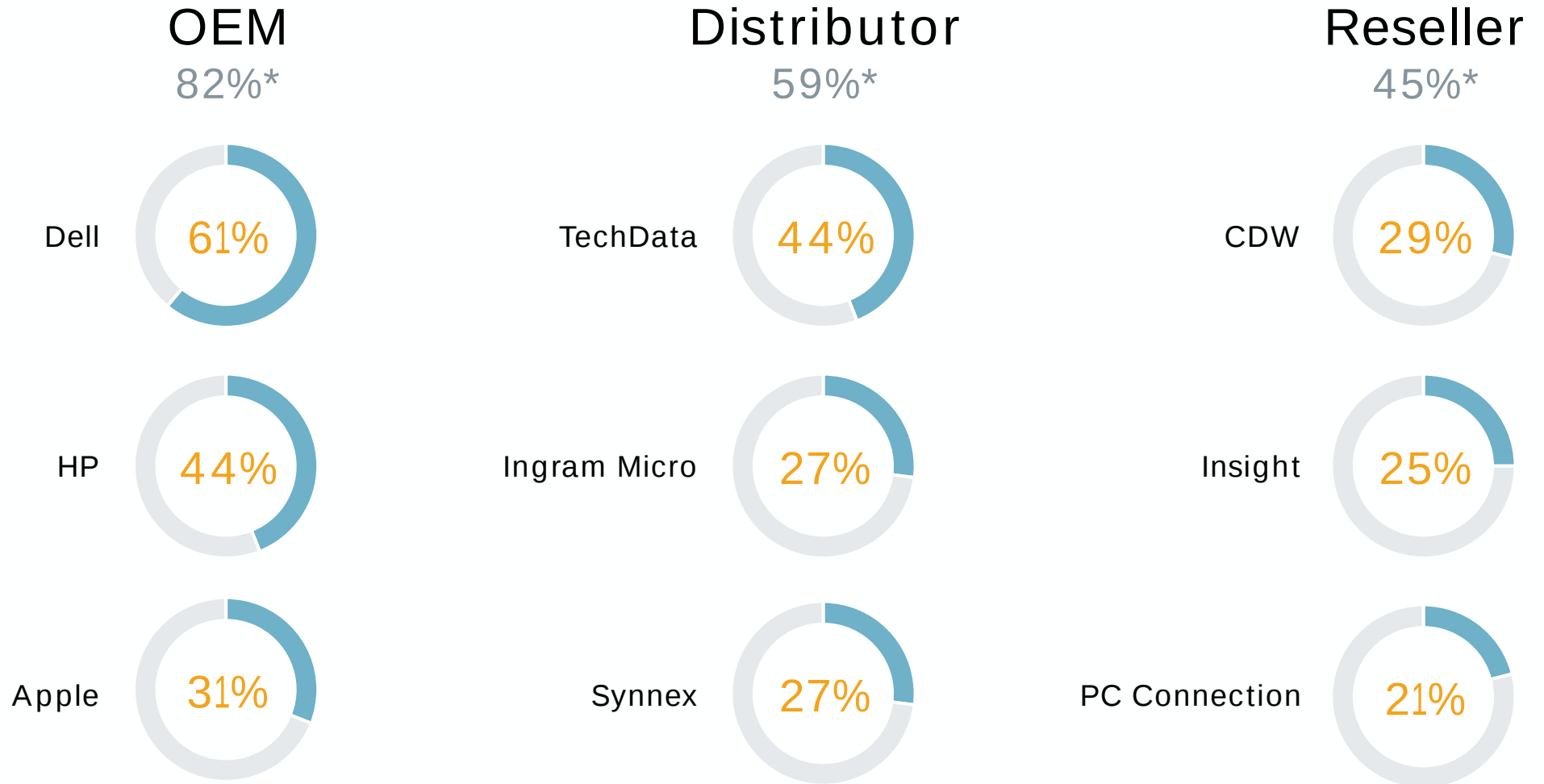
Input received from End Users in the workstation buying decision





XL / L ITDM - ACROSS COMPANY SIZES

## TOP PURCHASE CHANNEL PREFERENCES

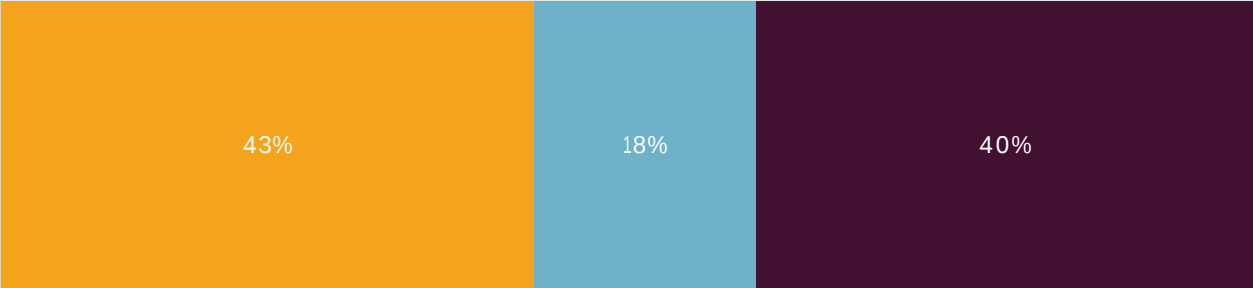


\*Total percent equals the percentage that buy from a specific channel. Respondents could purchase from multiple channels in their response.

# XL/L ITDM: PREFERRED PURCHASING PROCESS

- Low portion complete workstation transactions themselves vs. leveraging a partner
- Majority of ITDMs purchase through OEMs

Preferred Process



■ Explore solutions and complete the transaction with the assistance of a partner/reseller/manufacturer

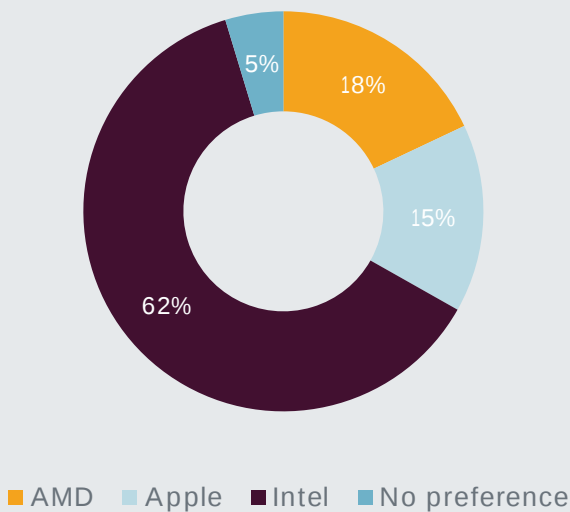
■ Explore solutions and complete the transaction yourself

■ Explore solutions yourself online, but contact partner/reseller/manufacture to complete transactions

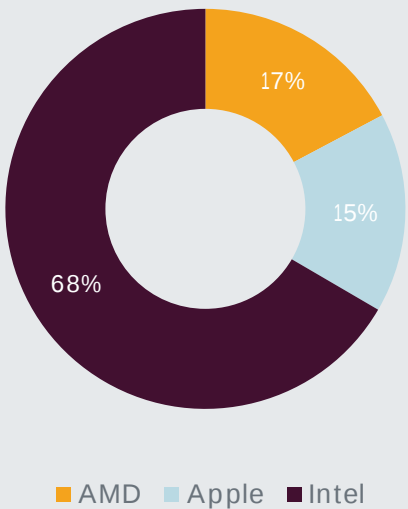
# XL/L ITDM: PROCESSOR PREFERENCE & PURCHASE

- Apple is competitive to AMD
- Opportunity to gain 5% share of those with no processor preference
- AMD's Performance message is highly relevant
- Trusted may be an obstacle compared to Intel

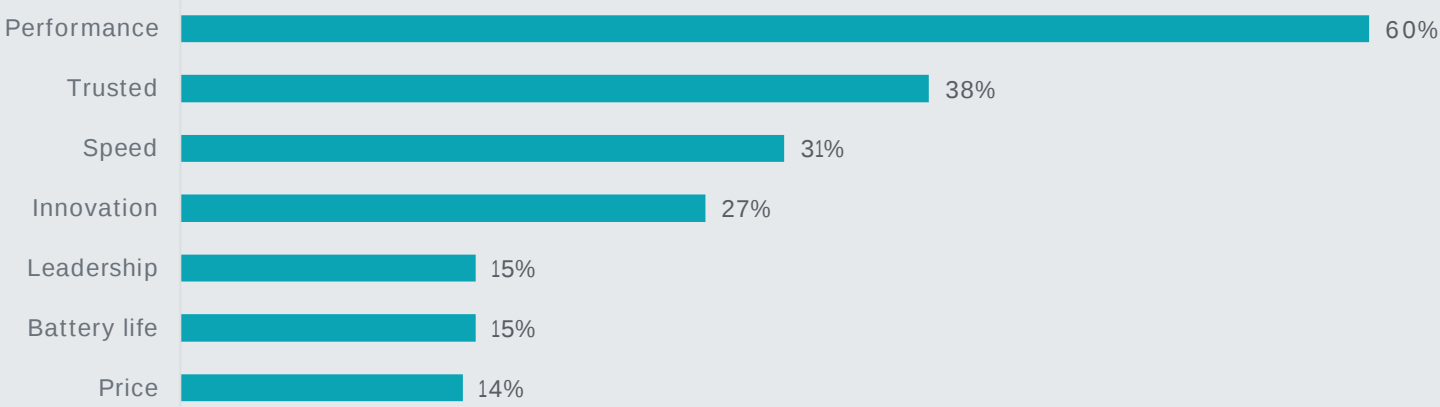
Processor Preferred



Processor Purchased



Top reasons for purchasing processor brand

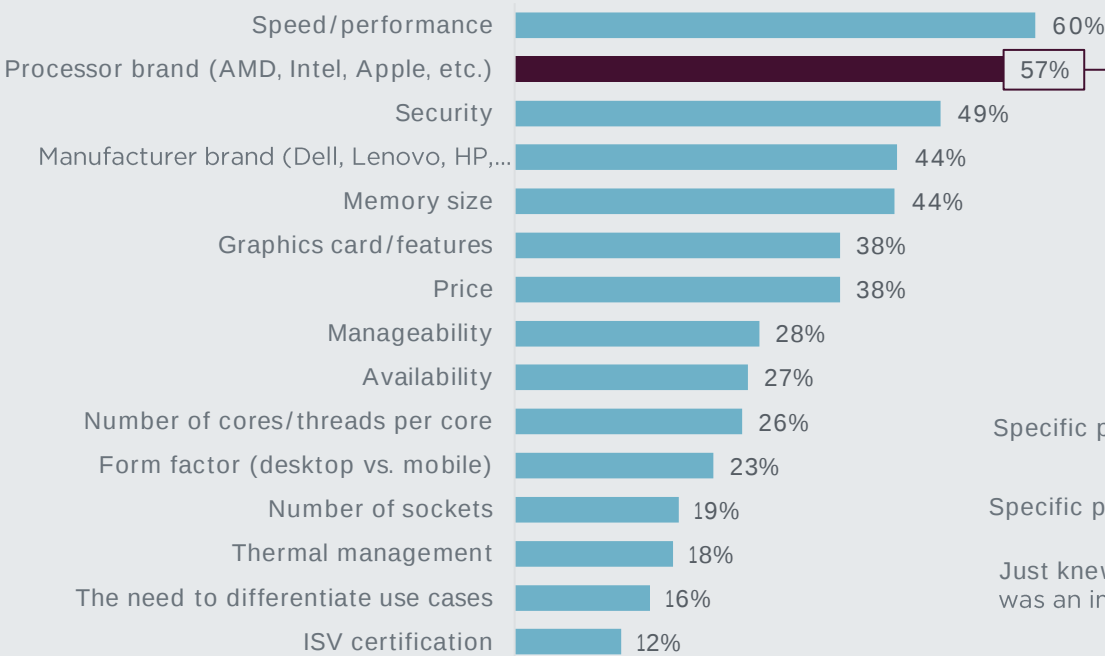


Q5. Which processor brand do you primarily purchase for workstations in your organization?  
Q6. Which processor brand would you prefer for workstations in your organization?  
Q5a. What are the top two reasons why you purchase this processor brand?  
Source: Dialog AMD Workstation Persona & Buyer's Journey Research, April 2022 - U.S.

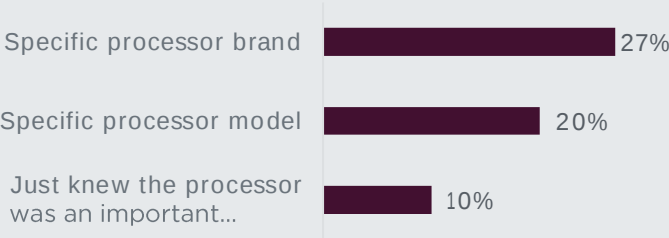
# XL/L ITDM: PROCESSOR CONSIDERATIONS & CHALLENGES

- Security is 13% less important for Med-Small ITDMs
- Use cases are 6% more important for Med-Small ITDMs
- Top challenges were consistent across company size

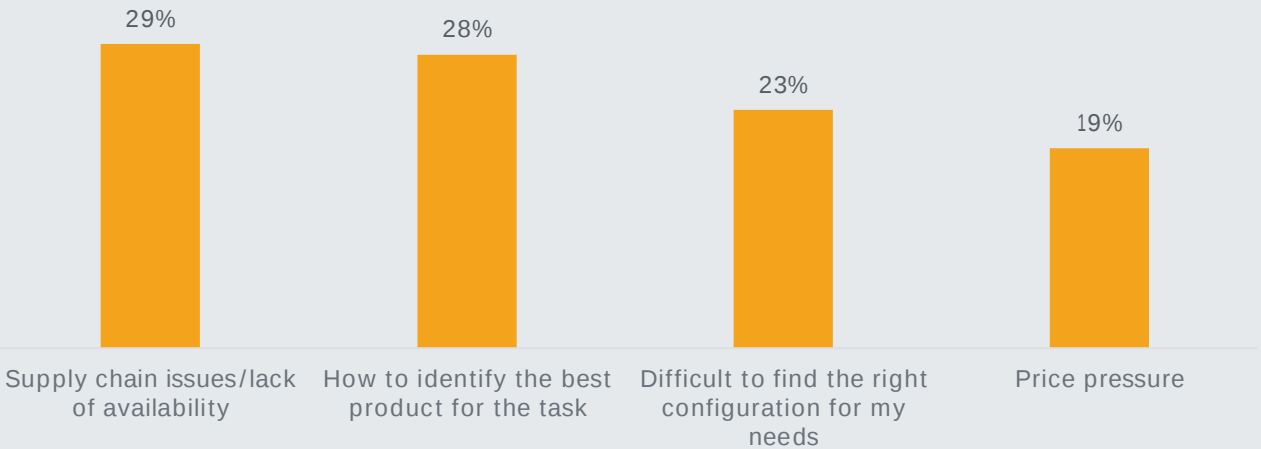
Top 5 criteria for initial workstation purchase considerations



Processor brand specifics



Top selected challenge to workstation purchases

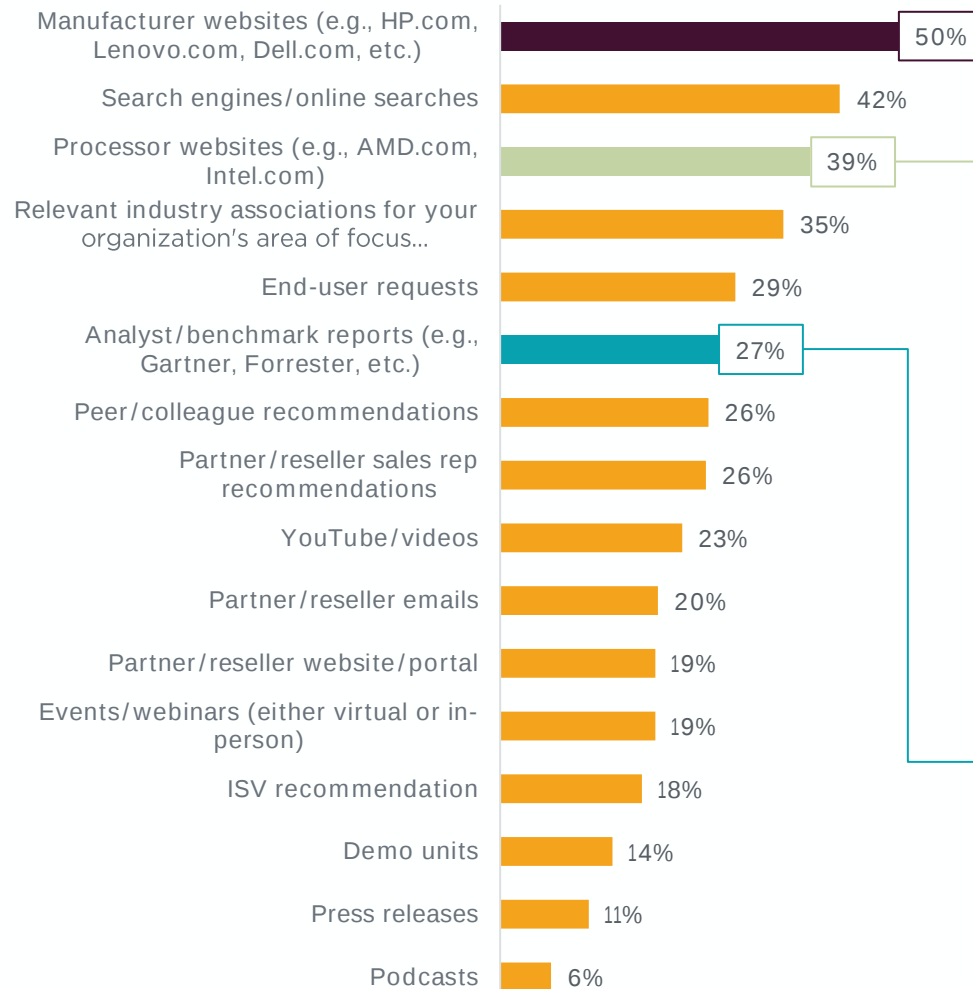


Q8: Thinking about the purchase of your workstation, what top 5 criteria did you have in mind when you started the workstation buying process?  
Q7: Please rank the top challenges your organization faces when purchasing workstations in order of priority.  
Source: Dialog AMD Workstation Persona & Buyer's Journey Research, April 2022 - U.S.

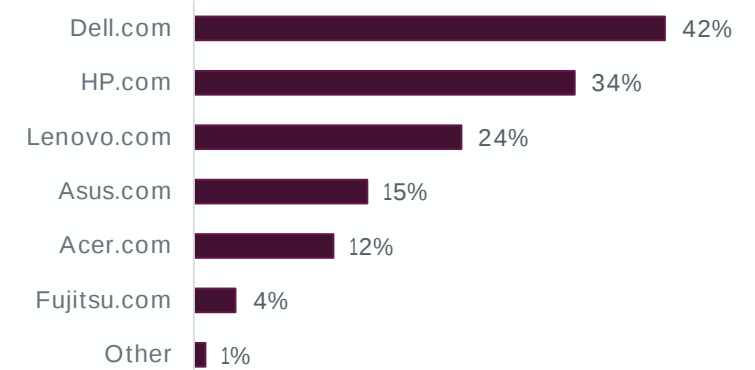
# BUYER'S JOURNEY - XL / L ITDM

## AWARENESS CONTENT SOURCES

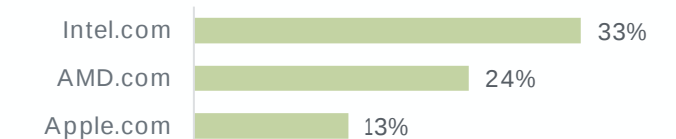
- Manufacturer websites dominate at 50%
  - Dell preferred followed by HP
- Search plays a significant role followed by processor sites
  - Approx. 10% drop between each site despite Apple's scores in other areas
- Industry associations, partner/reseller sales rep and peer recommendations, and analyst benchmark reports are key
  - Forrester and Gartner tied
- More likely to read Peddie Report than other audiences



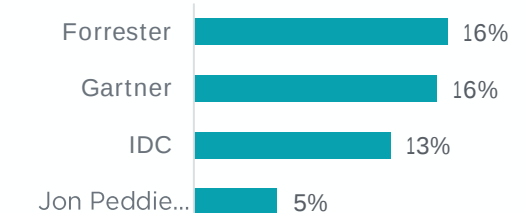
### Manufacturer website expansion



### Processor website expansion



### Analyst/benchmark expansion



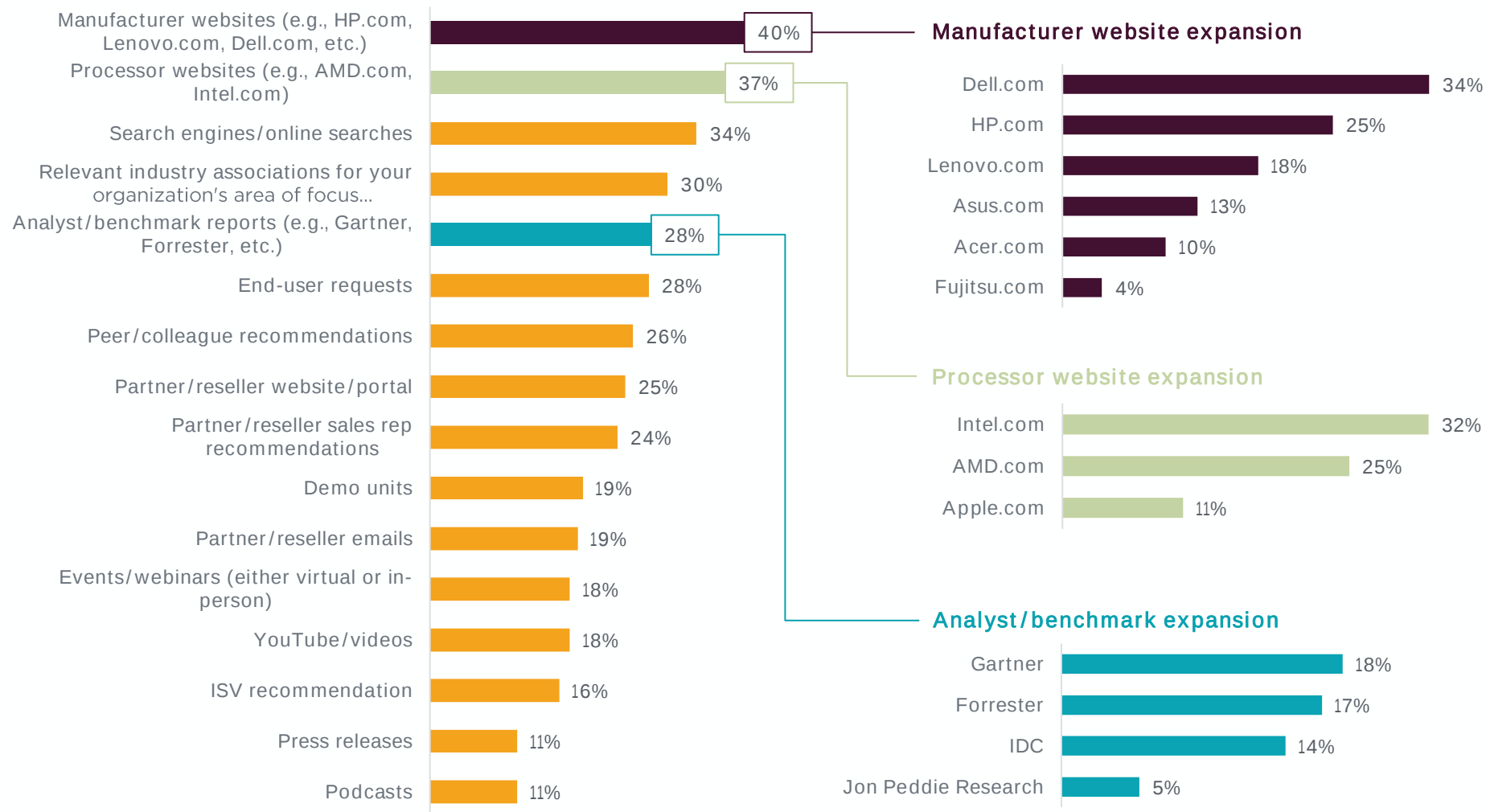
Q11a. Thinking about the first phase of your buying process, where did you seek/gather information when you were beginning your search for potential workstations to buy?

Source: Dialog AMD Workstation Persona & Buyer's Journey Research, April 2022 - U.S.

# BUYER'S JOURNEY - XL / L ITDM

## CONSIDERATION CONTENT SOURCES

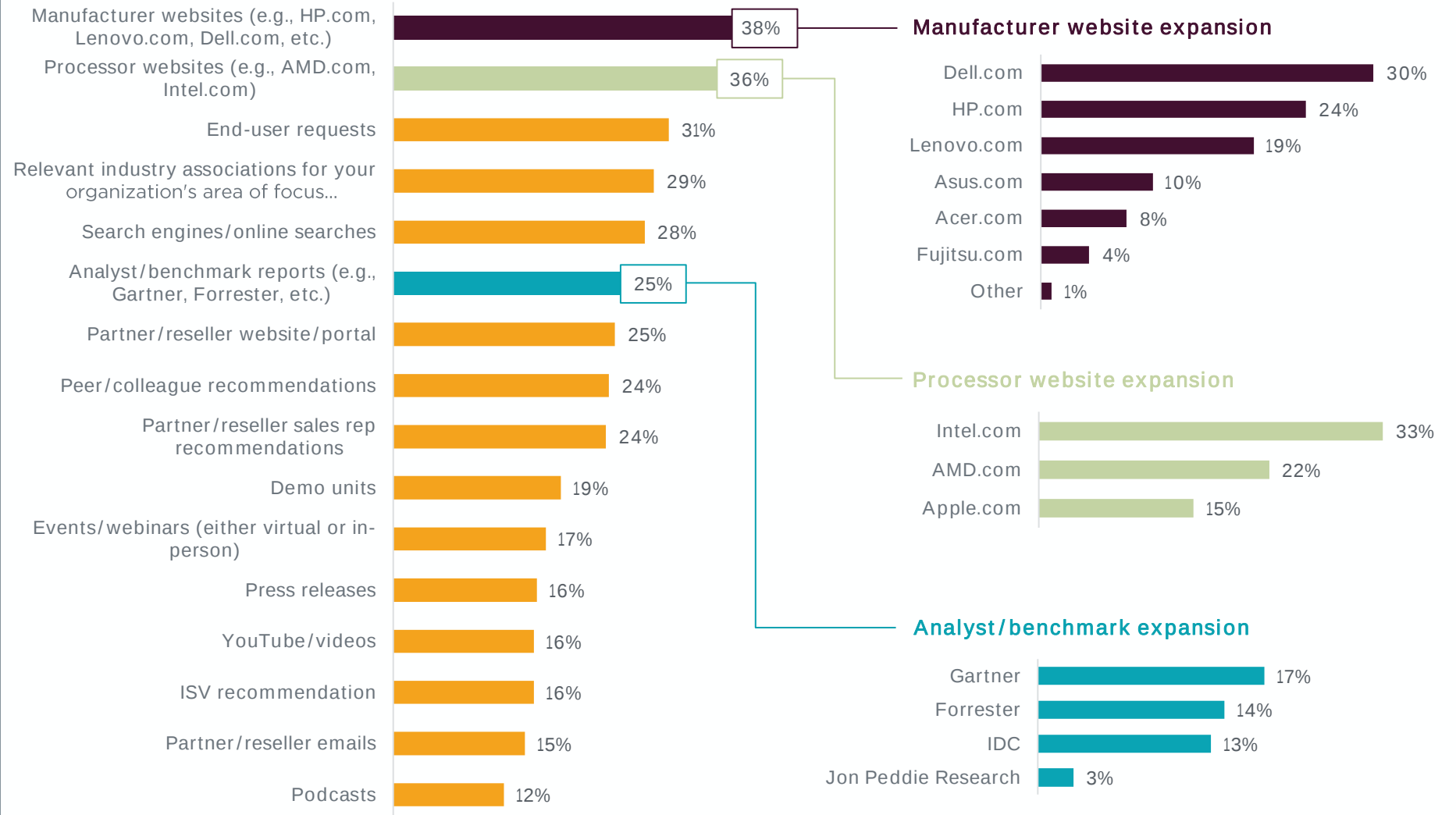
- OEM sites begin to even out a bit, while getting closer to processor sites
- Other sources remain fairly consistent



# BUYER'S JOURNEY - XL / L ITDM

## PURCHASE CONTENT SOURCES

- Websites remain important but drop in focus as well as search
- End user requests increase in the purchase phase of the journey

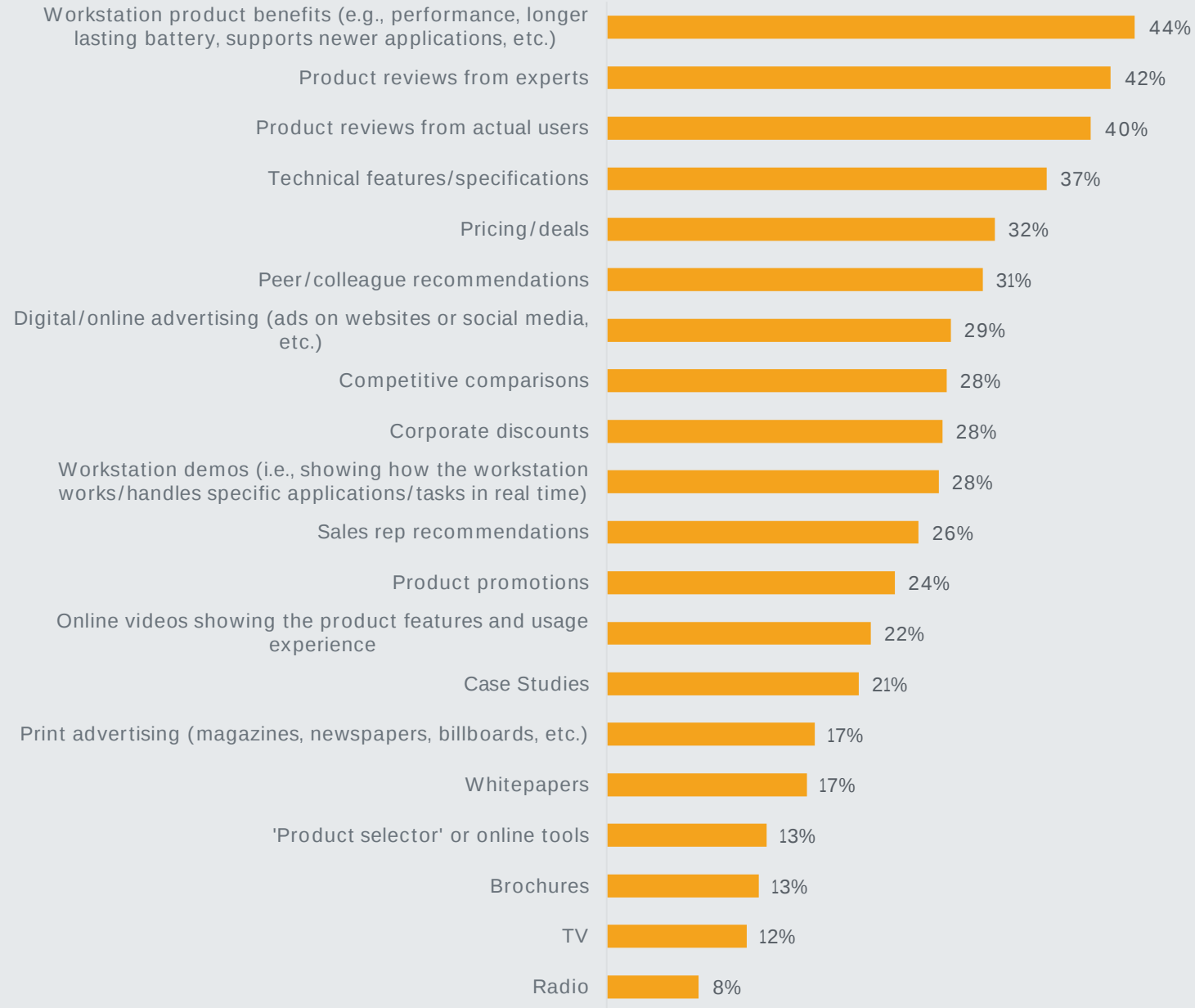


Q11c. Thinking about the third phase of your buying process, where did you seek/gather information when you were beginning your search for potential workstations to buy?

Source: Dialog AMD Workstation Persona & Buyer's Journey Research, April 2022 - U.S.

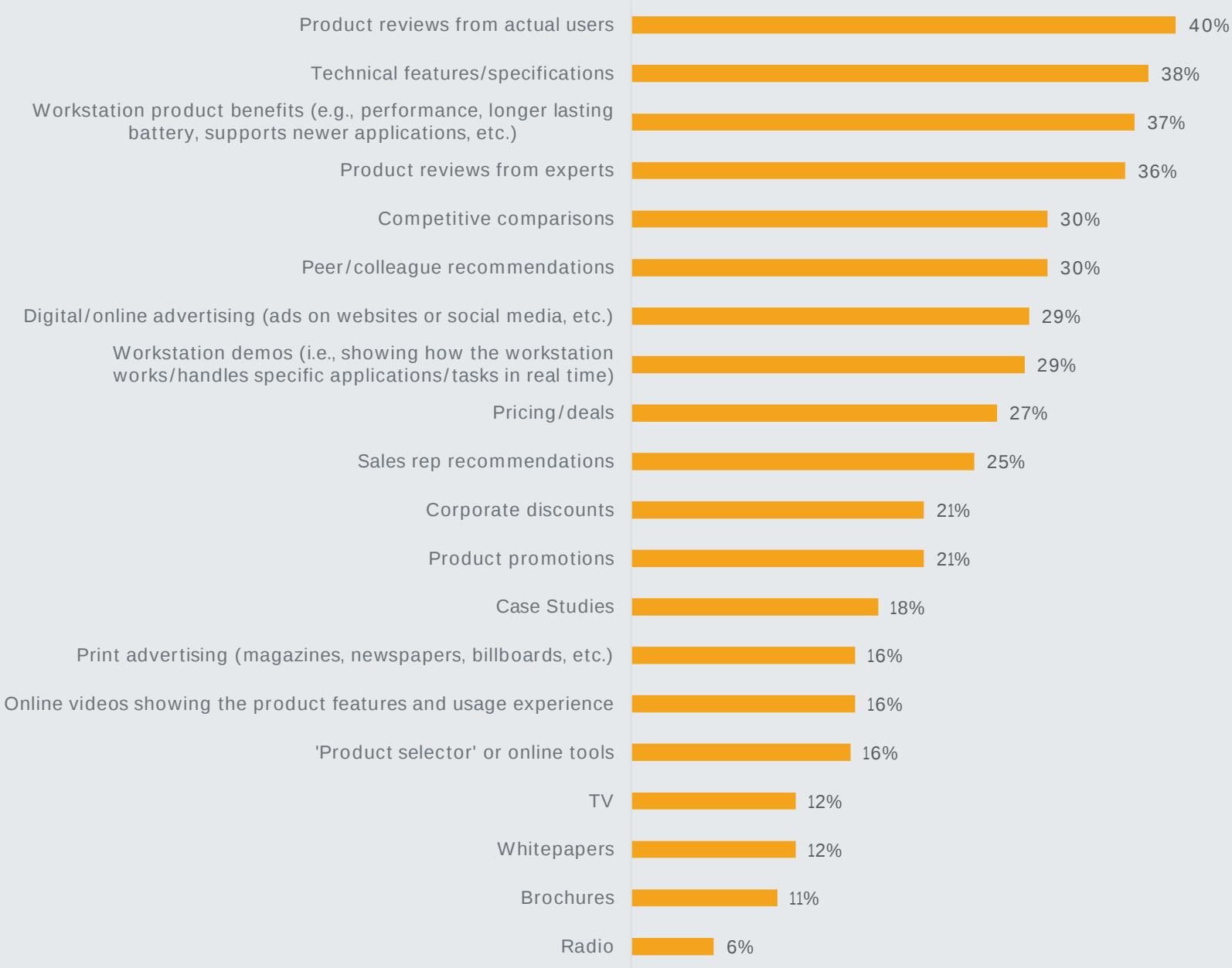
# XL/L ITDM: AWARENESS CONTENT TYPES

- Workstation product benefits are key followed by expert and user reviews
- Tech specs are important along with pricing and peer recommendations
- Digital advertising, corporate discounts, and demos all play key roles



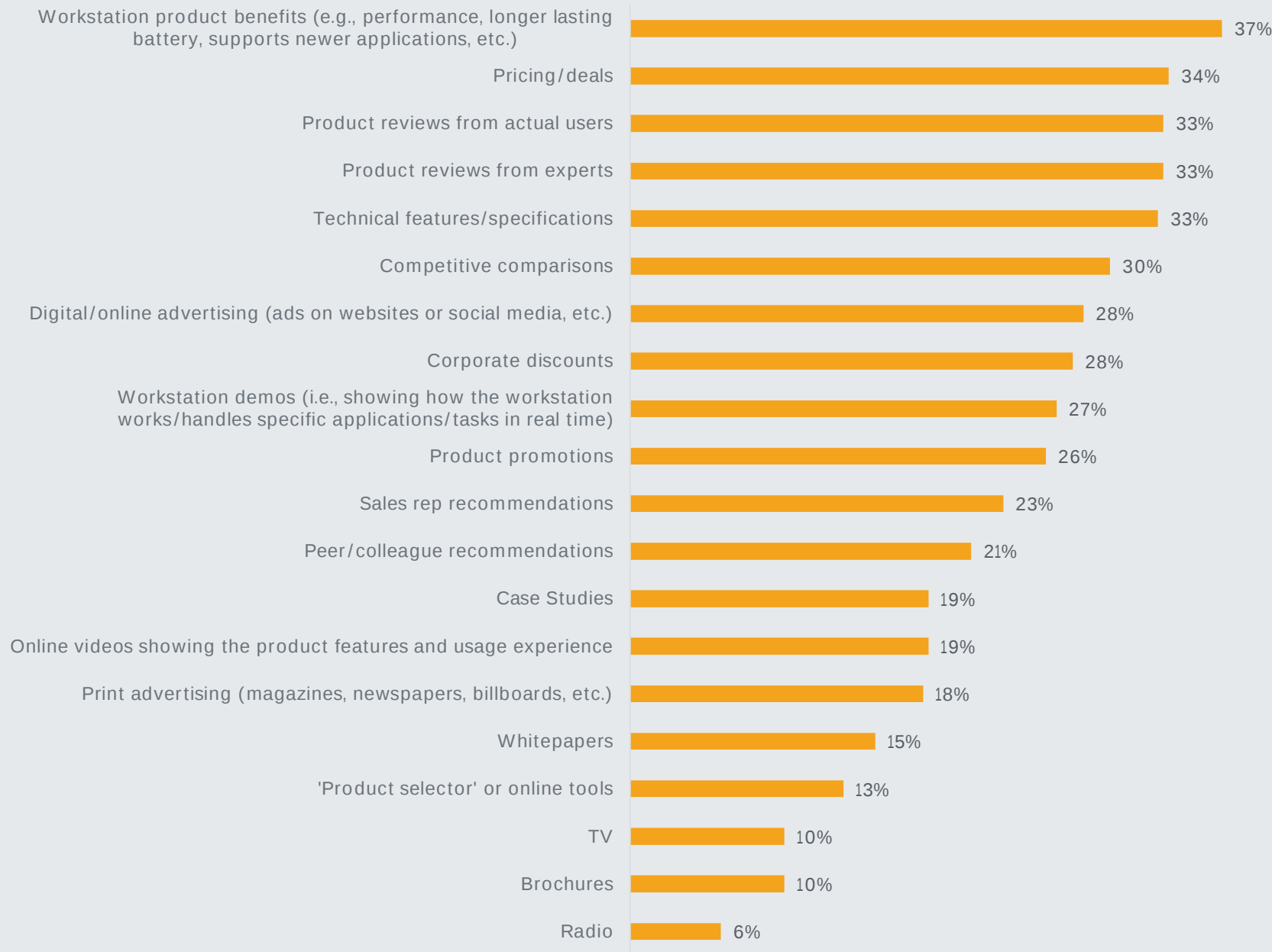
# XL/L ITDM: CONSIDERATION CONTENT TYPES

- Content preferences begin to even out, but not dramatically
- Expert reviews become not as key as user reviews
- Corporate discounts and workstation benefits decline
- Digital advertising remains fairly consistent, as well as tech specs



# XL/L ITDM: PURCHASE CONTENT TYPES

- Corporate discounts, product promotions, and pricing increase as predicted
- Digital advertising and sales rep recommendations stay consistent during the entire process



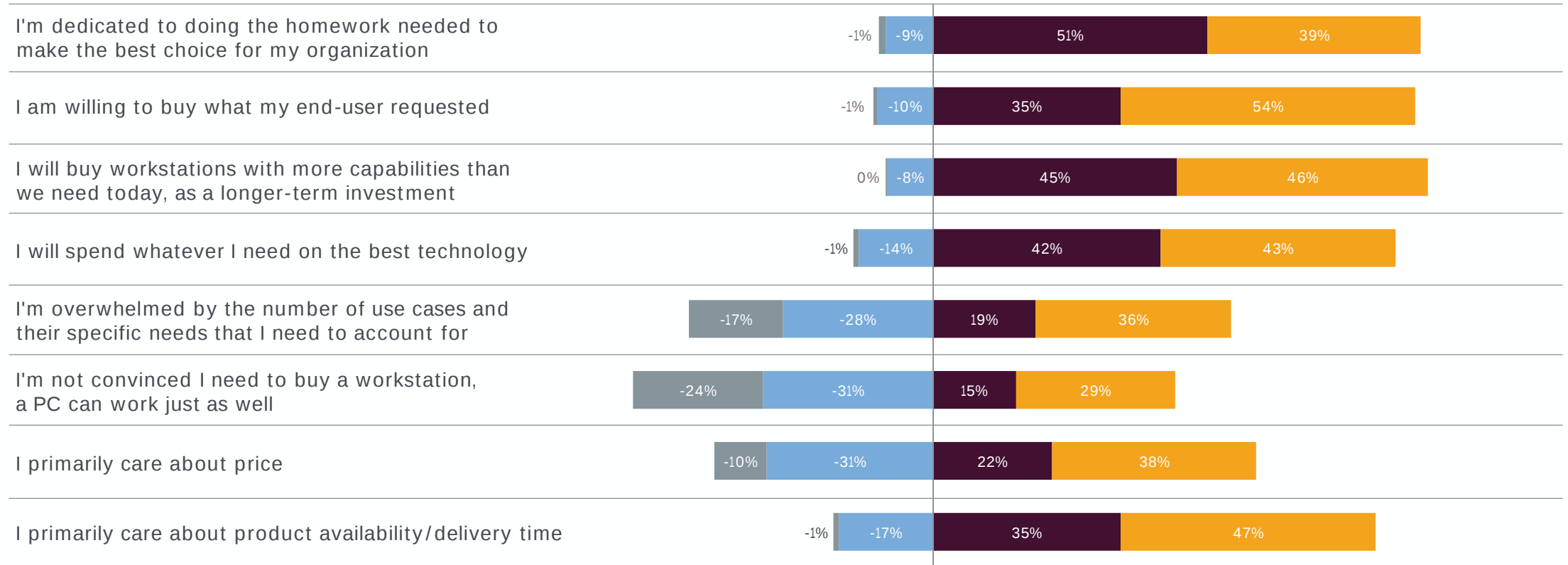
## EMOTIONS EXPERIENCE - XL / L ITDM

# AWARENESS

**XL/L ITDMs are more aware of balancing short-term needs with long-term investment and may be slightly less likely to “overbuy” capabilities for future use as search begins, depending on price and availability.**

EMOTIONS  
PROVOKED IN  
QUESTION

POSITIVE



Strongly agree Somewhat agree Somewhat disagree Strongly disagree

Q13: Thinking about these emotions during each phase of your buying process, how strongly do you agree or disagree with each statement?

Source: Dialog AMD Workstation Persona & Buyer's Journey Research, April 2022 - U.S.

# EMOTIONS EXPERIENCE - XL / L ITDM

## CONSIDERATION

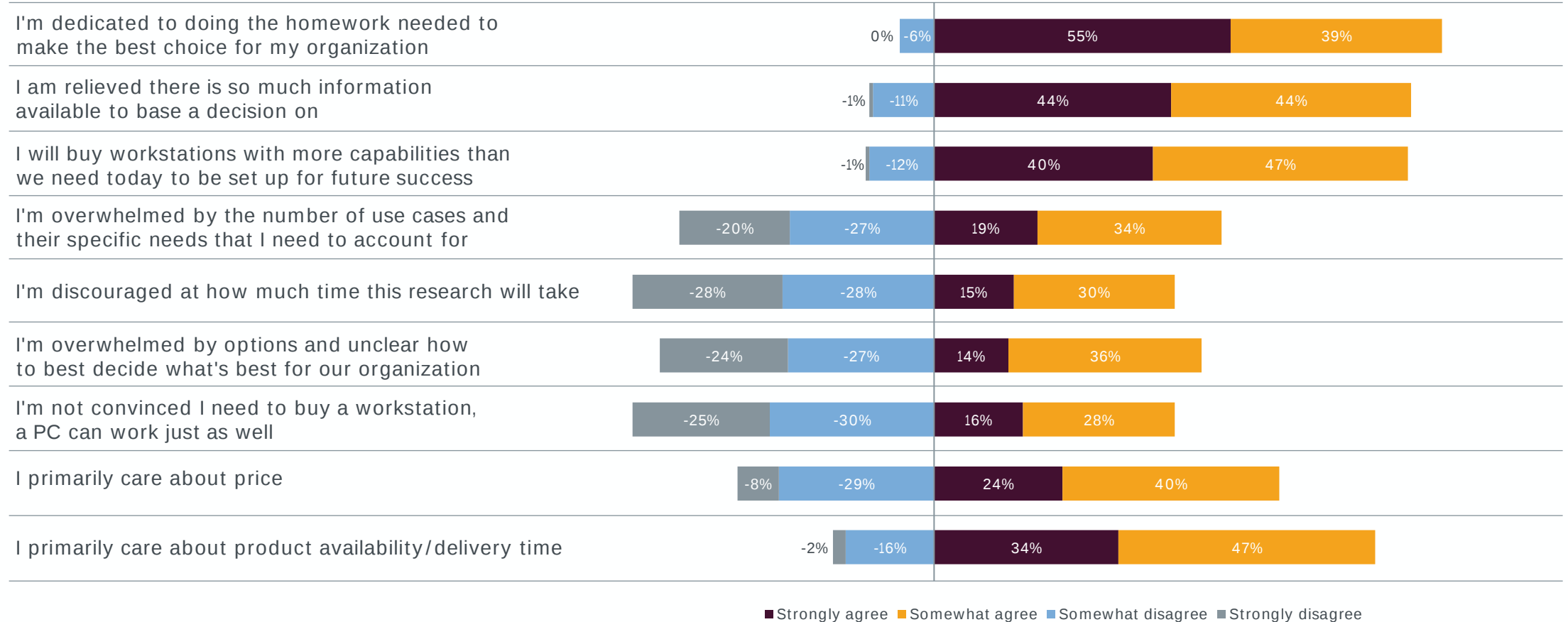
XL/Large ITDMs are less overwhelmed than others, but still have concerns evaluating user needs and balancing cost and availability.

EMOTIONS  
PROVOKED IN  
QUESTION

POSITIVE



NEGATIVE



Q13: Thinking about these emotions during each phase of your buying process, how strongly do you agree or disagree with each statement?

Source: Dialog AMD Workstation Persona & Buyer's Journey Research, April 2022 - U.S.

## EMOTIONS EXPERIENCE - XL / L ITDM

# PURCHASE

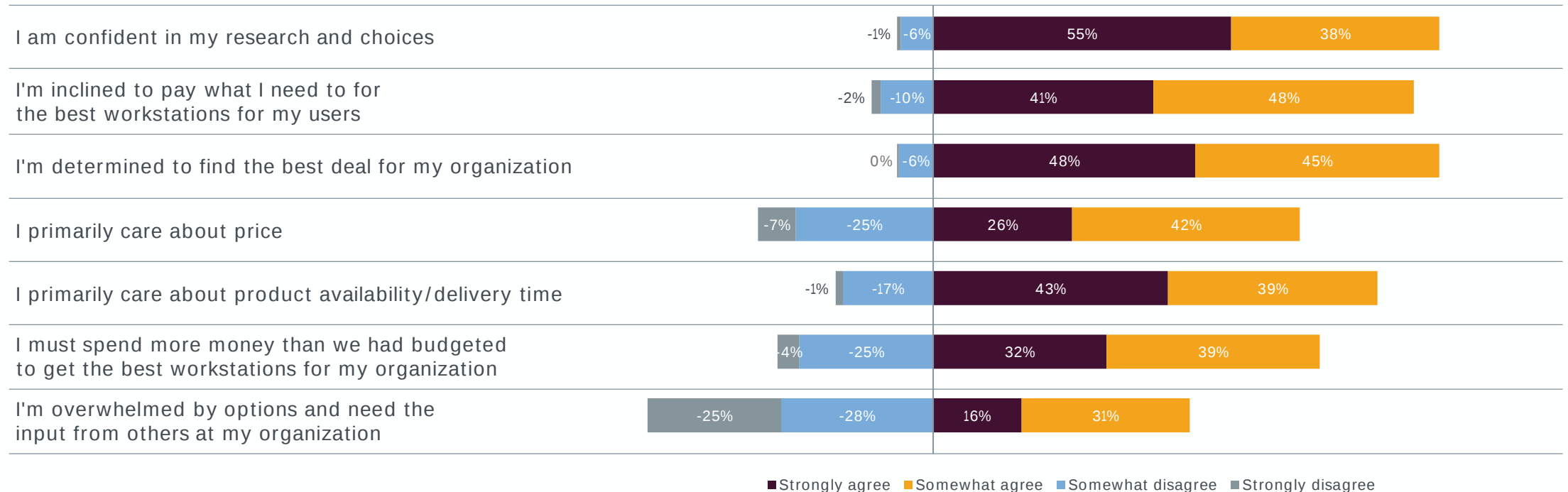
In the final decision process, emotion about price for workstation products becomes less of an issue, as the availability and meeting user need are what drives the final deal that gets made. They do believe this product purchase likely to be above budget.

EMOTIONS  
PROVOKED IN  
QUESTION

POSITIVE



NEGATIVE



Q13: Thinking about these emotions during each phase of your buying process, how strongly do you agree or disagree with each statement?

Source: Dialog AMD Workstation Persona & Buyer's Journey Research, April 2022 - U.S.

# Media and Entertainment Vertical ITDM

Lucy,  
IT Director



# MEDIA AND ENTERTAINMENT VERTICAL ITDM

## Meet Lucy, IT Director

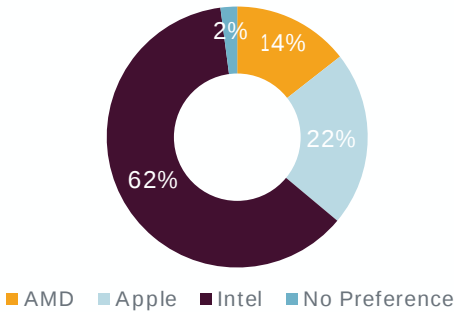
“We reach out to team leads and ask them for their software requirements. We don't necessarily ask them for the hardware because that's not their expertise. We need to know what type of software they're running, and the requirements and my team comes up with the best choices and the hardware that meets their requirements.”

- Average Age: 41
- International: 24%
- Top Applications: 3D Modeling & Design (69%), Data Science (60%), Software Development (59%)
- Procurement (10%) is the primary function involved with purchasing decisions with IT (80%)
- More likely to have continued Apple loyalty

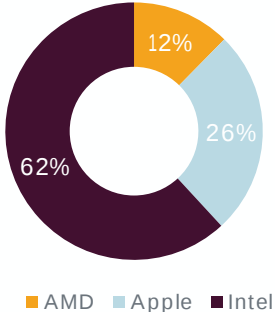
## PURCHASING BEHAVIOR

|                                               |                                                                                                                    |
|-----------------------------------------------|--------------------------------------------------------------------------------------------------------------------|
| Average Workstation Purchase Cycle            | • 1x year (over-indexed on “every few months” at 30% vs 24% elsewhere)                                             |
| Journey Duration                              | • 58 days (each phase is fairly even for this persona)                                                             |
| Primary Purchase Drivers                      | • Processor Brand (45%), Manufacturer Brand/Speed/Performance/Security (41% - equal rankings for 2 <sup>nd</sup> ) |
| Top Workstation Purchase Challenges           | • Difficult to find the right configuration for my needs<br>• Supply chain issues                                  |
| % that Share Decision Making                  | • 11%                                                                                                              |
| Top 2 Reasons for Purchasing Processor Brand  | • Performance (46%), Speed (33%)                                                                                   |
| Moving to Advanced Cloud Computing (off prem) | • 32%                                                                                                              |
| Top Purchase Channel                          | • OEM – Dell (60%)<br>• Distributor – PC Connection (70%)<br>• Reseller- TechData (64%)                            |

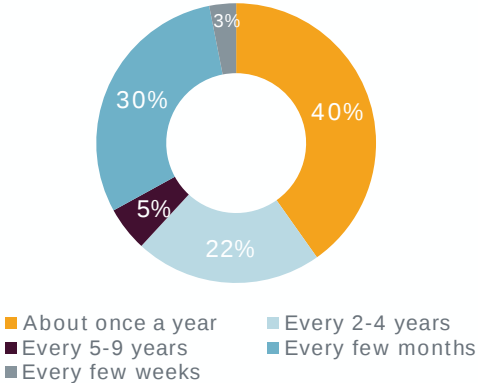
Processor Preferred



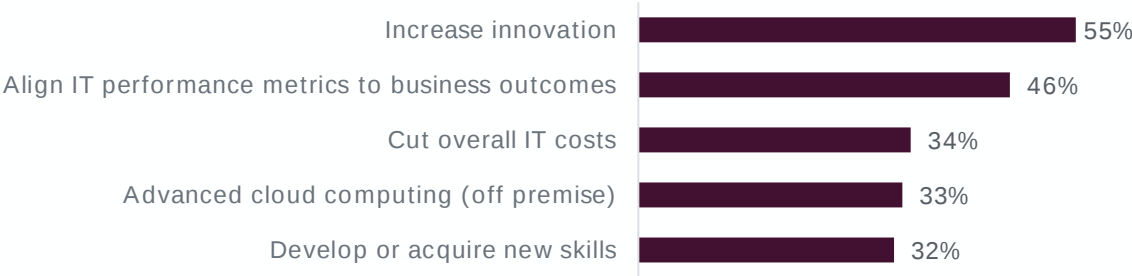
Processor Purchased



Purchase frequency



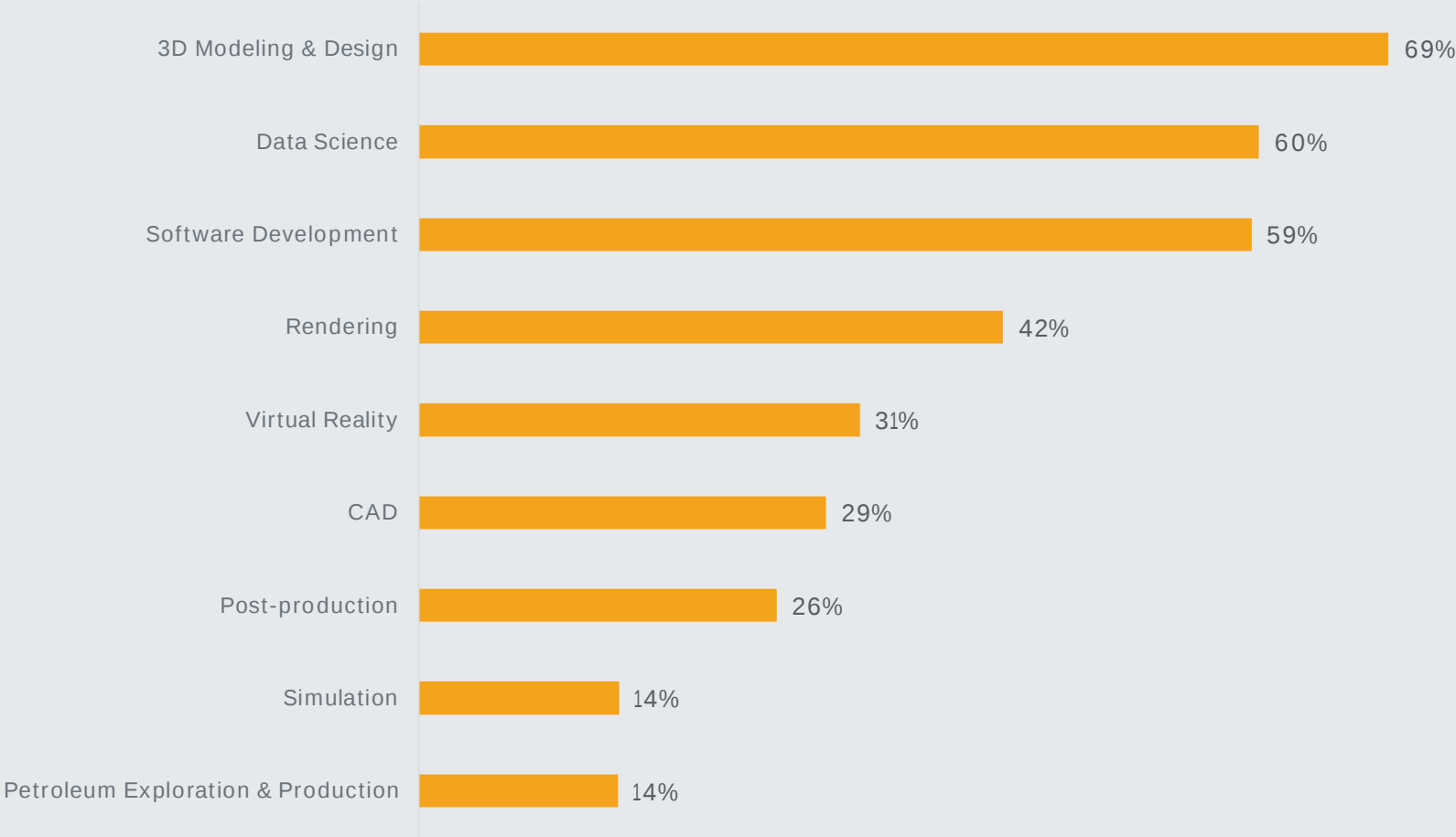
Top tech priorities



# M&E ITDM: APPLICATIONS/ USAGE

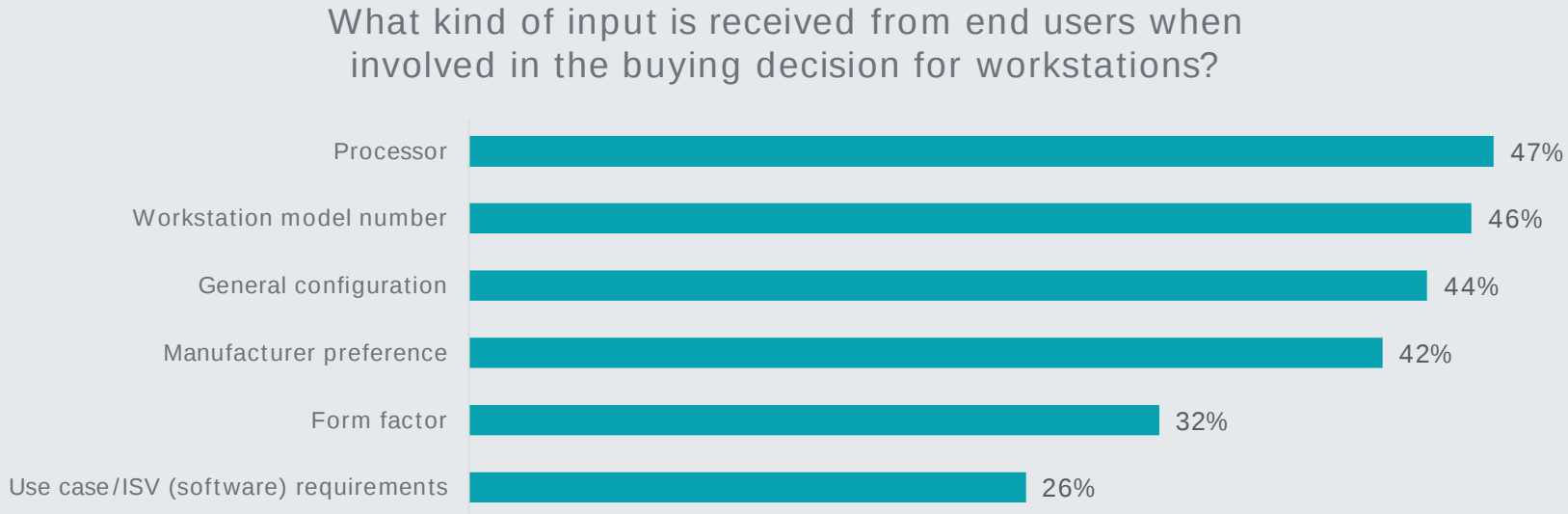
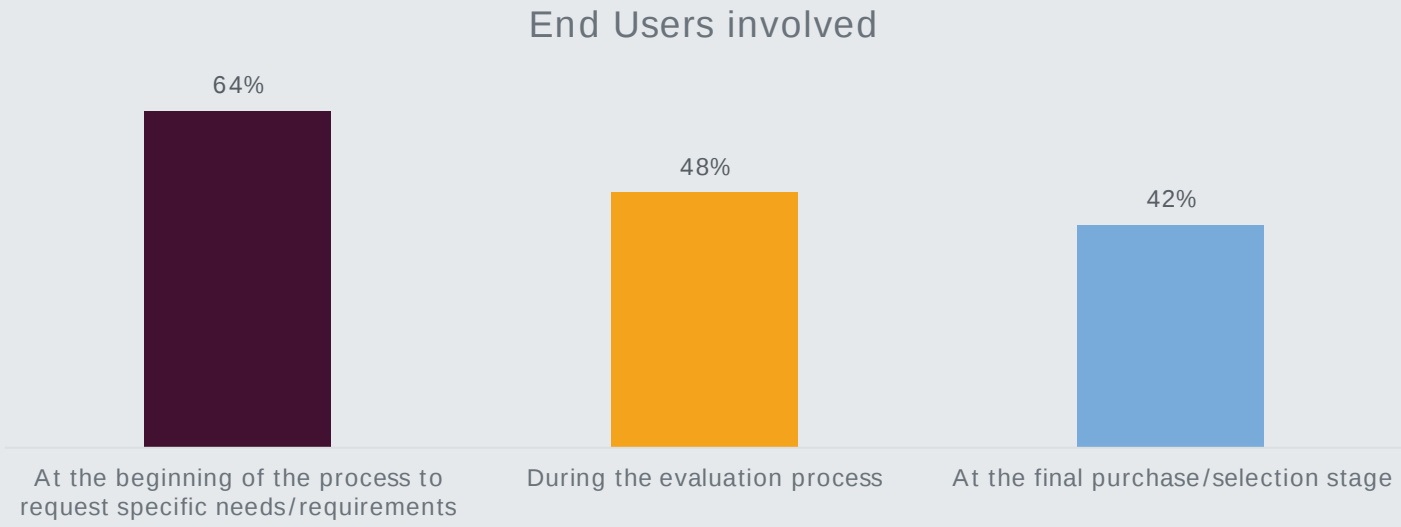
- 3D Modeling ranked highest with Data Science and Software Development almost tied
- Small companies ranked higher for responding to sales conversations, attractive offers, and market events
- Medium-sized companies had a spike for manufacturer dissatisfaction

What kind of applications/outputs do your end users typically use their workstations to handle?



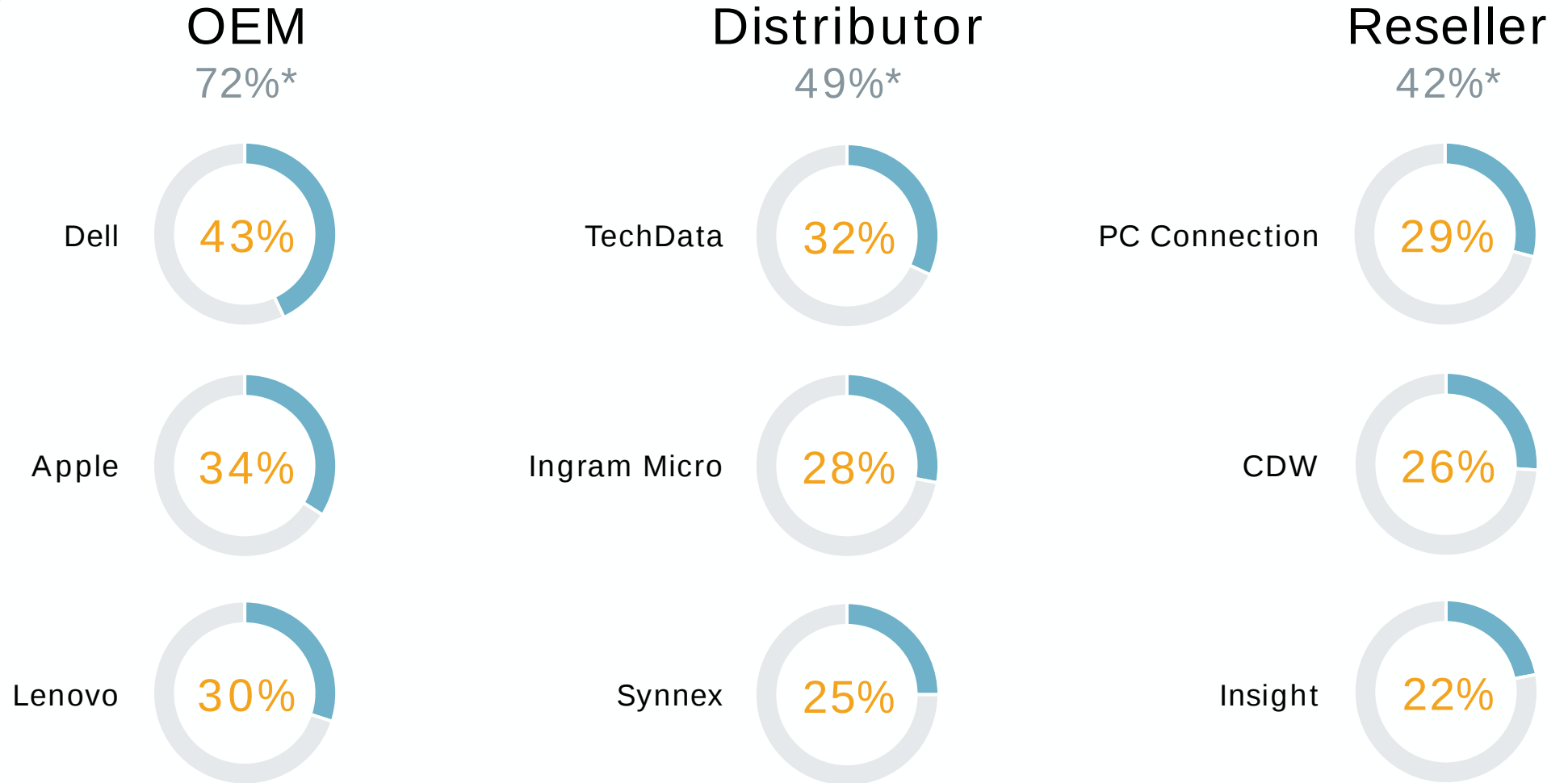
# M&E ITDM: END USER INVOLVEMENT

- Play a significant role in the purchasing process at the beginning and stay more involved in purchasing stage than general ITDMs by 8%
- Workstation model is 10% higher than XL/L ITDMs





## TOP PURCHASE CHANNEL PREFERENCES



\*Total percent equals the percentage that buy from a specific channel. Respondents could purchase from multiple channels in their response.

Q4: From which of the following sources does your organization typically purchase workstations?

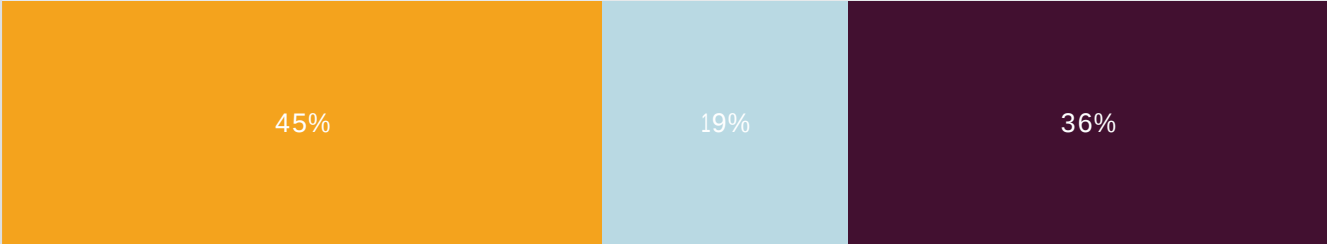
Source: Dialog AMD Workstation Persona & Buyer's Journey Research, April 2022 - U.S.

# M&E ITDM: PREFERRED PURCHASING PROCESS

Low portion of respondents complete transaction themselves vs. leveraging a partner

Majority purchase through OEMs, followed by distributors and then resellers.

Preferred Process

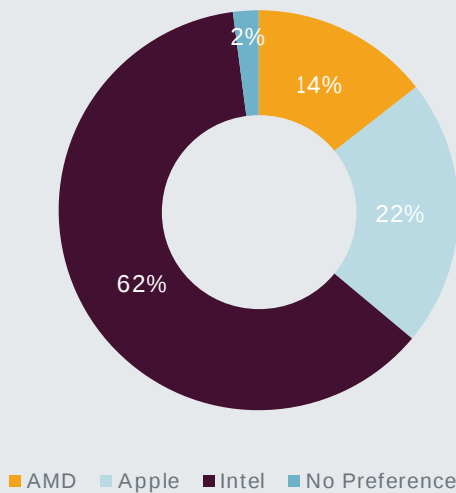


- Explore solutions and complete the transaction with the assistance of a partner/reseller/manufacture
- Explore solutions and complete the transaction yourself
- Explore solutions yourself online, but contact partner/reseller/manufacture to complete transactions

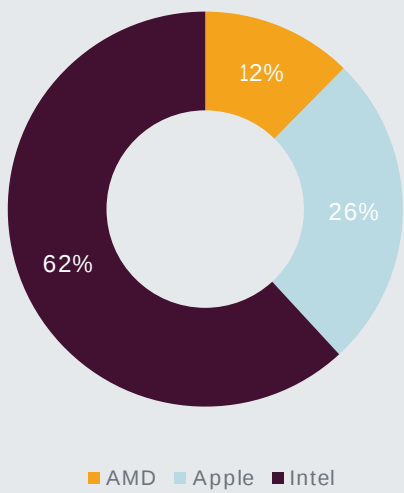
# M&E ITDM: PROCESSOR PREFERENCE & PURCHASE

- Apple significantly outranks AMD for both preference (8%) and purchase (14%)
  - Apple is still the default platform for video editing and post-production
  - Might be overestimating the power of their brand over time
  - Performance messaging and design focus
  - Consistent simplicity in branding for workstations featuring sleek designs
  - Focus on storytelling, featuring capabilities
  - Don't explicitly call out industries, though do mention the creative needs of designers and architects
- Performance remains the key reason followed by speed in comparison to being trusted for XL/L ITDMs

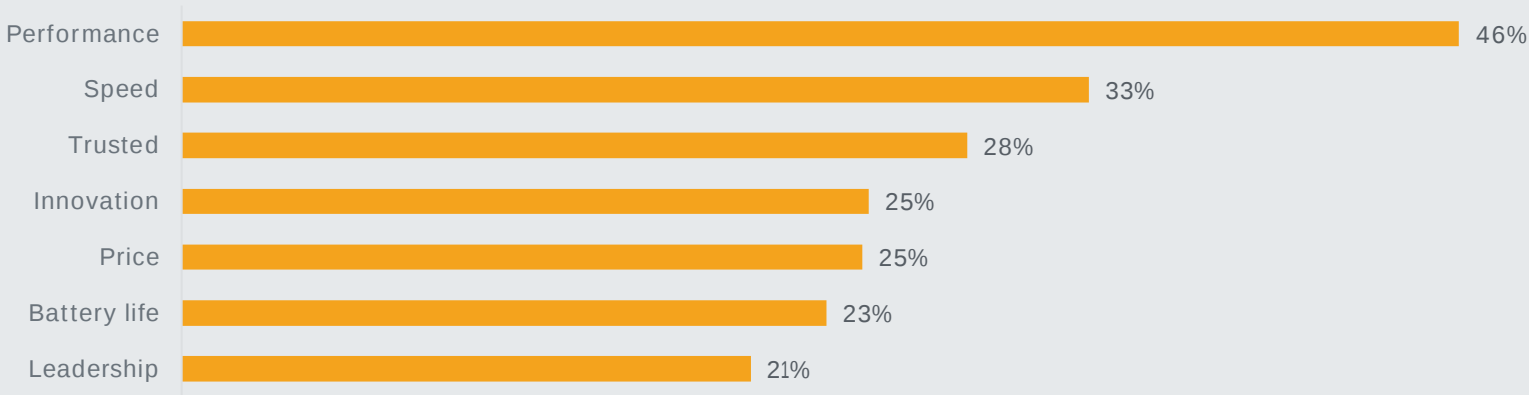
Processor Preferred



Processor Purchased



## What are the top two reasons why you purchase this processor brand?

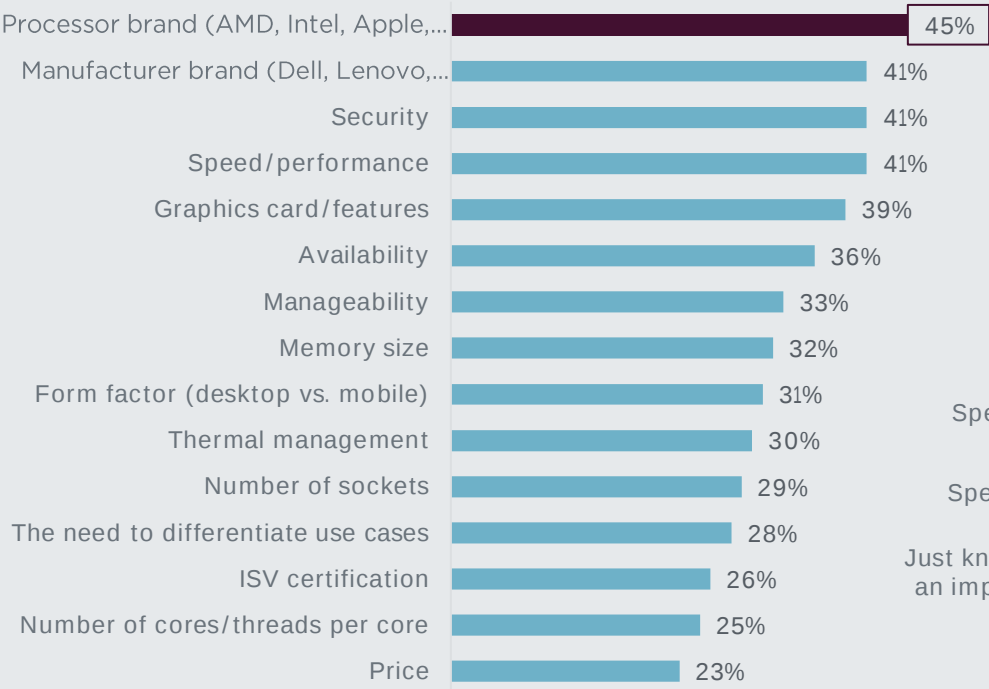


Q5. Which processor brand do you primarily purchase for workstations in your organization?  
Q6. Which processor brand would you prefer for workstations in your organization?  
Q5a. What are the top two reasons why you purchase this processor brand?  
Source: Dialog AMD Workstation Persona & Buyer's Journey Research, April 2022 - U.S.

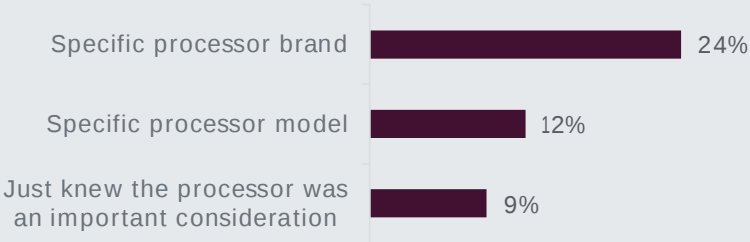
# M&E ITDM: PROCESSOR CONSIDERATIONS & CHALLENGES

- Processor brand ranks highest overall
  - Brand is the highest followed by model being half of brand selection
  - 9% opportunity to capture those that say it's important but didn't specify a brand or model
- Availability over-indexes at 36%, probably related to the technology failures cited elsewhere, making this a higher factor
- Security is a lower priority than for XL/L ITDMs
- Most concerned with finding the right configurations followed by supply chain issues, which ranked as #1 for XL/L ITDMs

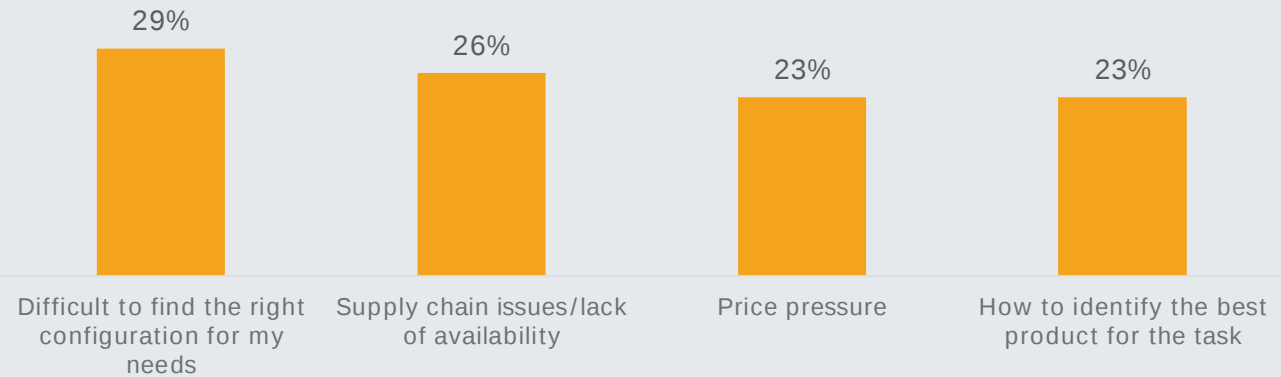
Top 5 criteria for initial workstation purchase considerations



Processor brand specifics



Top challenge to workstation purchases

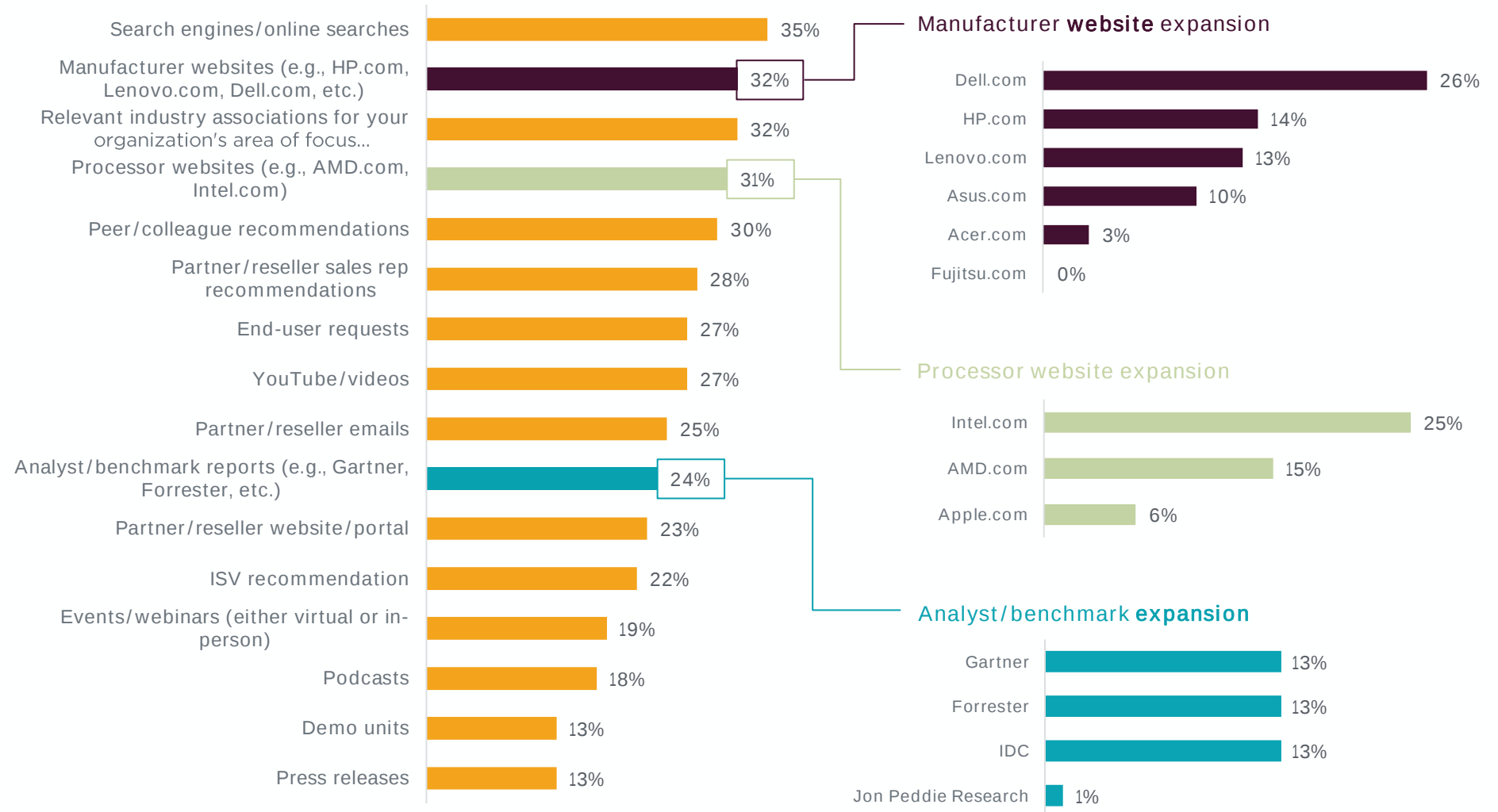


Q8: Thinking about the purchase of your workstation, what top 5 criteria did you have in mind when you started the workstation buying process.  
Q87: Please rank the top challenges your organization faces when purchasing workstations in order of priority.  
Source: Dialog AMD Workstation Persona & Buyer's Journey Research, April 2022 - U.S.

# BUYER'S JOURNEY - MEDIA & ENTERTAINMENT ITDM

## AWARENESS CONTENT SOURCES

- Search, OEM websites (*Dell is preferred*), and industry associations are key
- View more podcasts in initial stages (18% to 10% overall)
- Apple.com is surprisingly low for this target
- All analyst reports are on par with each other with the exception of Jon Peddie

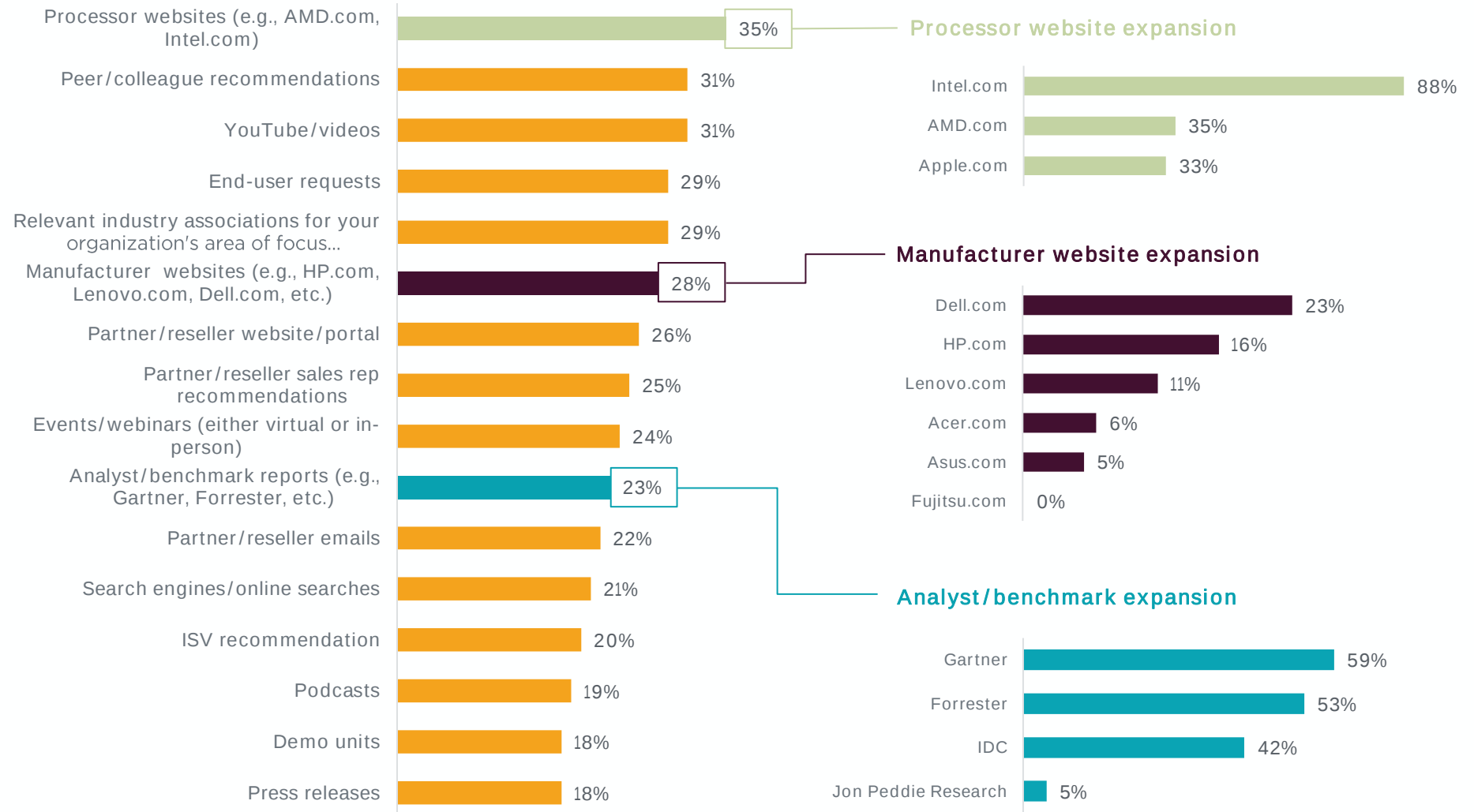


Q11. Thinking about the first phase of your buying process, where did you seek/gather information when you were beginning your search for potential workstations to buy? Source: Dialog AMD Workstation Persona & Buyer's Journey Research, April 2022 - U.S.

# BUYER'S JOURNEY - MEDIA & ENTERTAINMENT ITDM

## CONSIDERATION CONTENT SOURCES

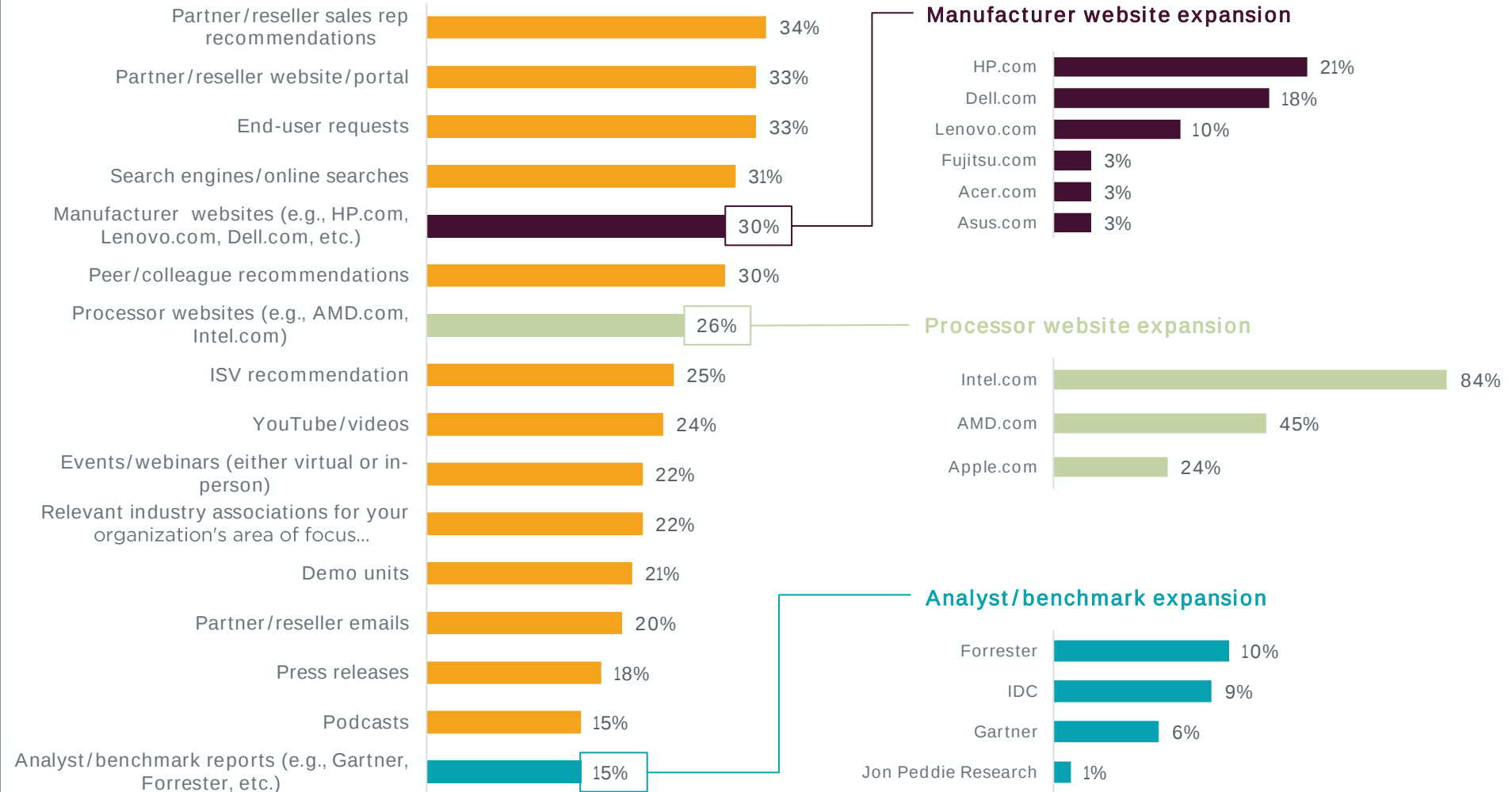
- Processor sites increase by 4% in this phase
  - Intel is more than double AMD and Apple for processor site sources
  - AMD and Apple are extremely close for this target
- Continue to view more of the middle tier content than others
  - YouTube, webinars, podcasts are all over-indexed to average
- YouTube videos play a key role and increase from the awareness stage



# BUYER'S JOURNEY - MEDIA & ENTERTAINMENT ITDM

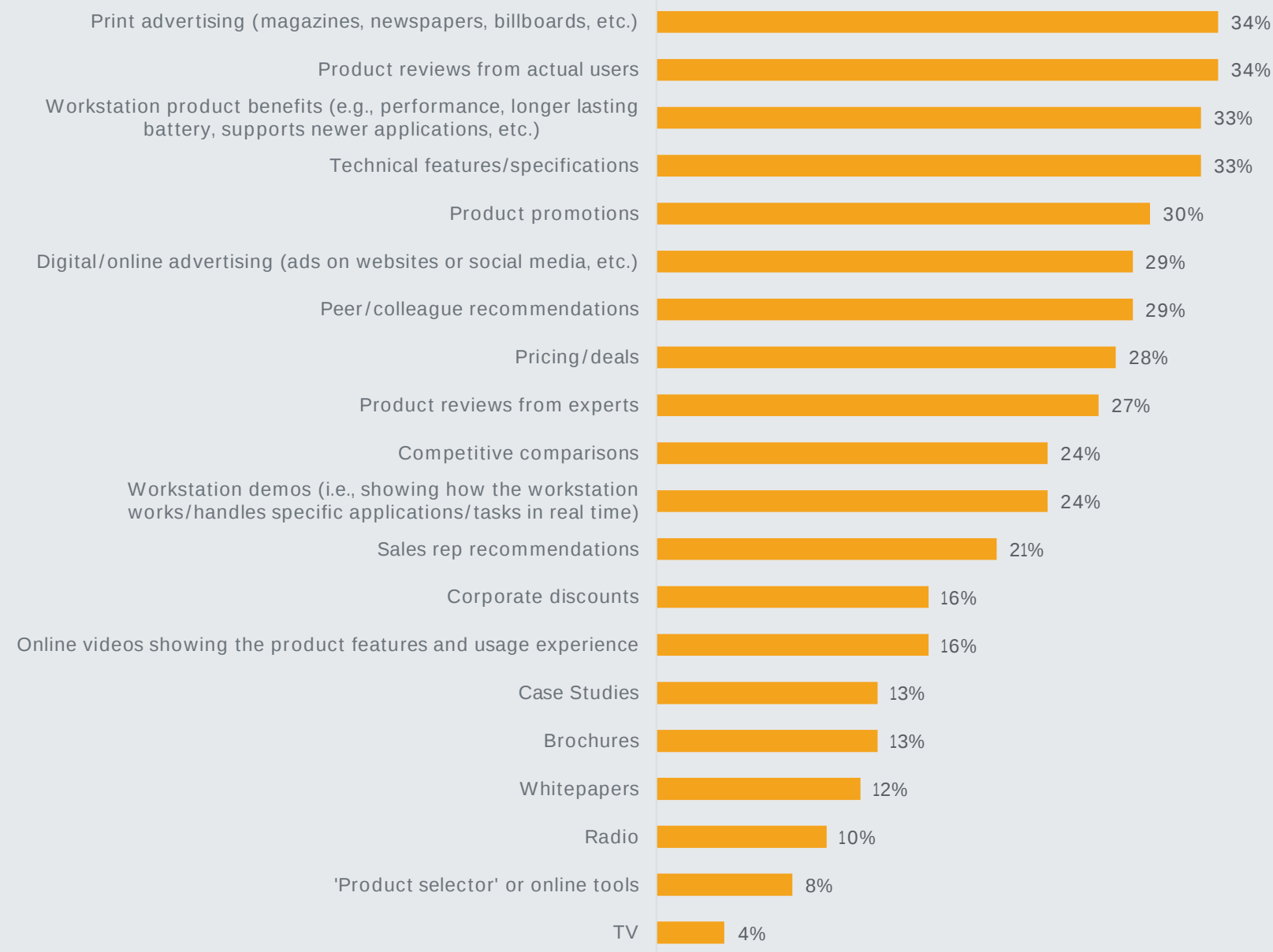
## PURCHASE CONTENT SOURCES

- Partner/reseller direct communications increase in importance as well as partner/reseller recommendations and websites/portals
- Processor websites go down by 9% from consideration phase



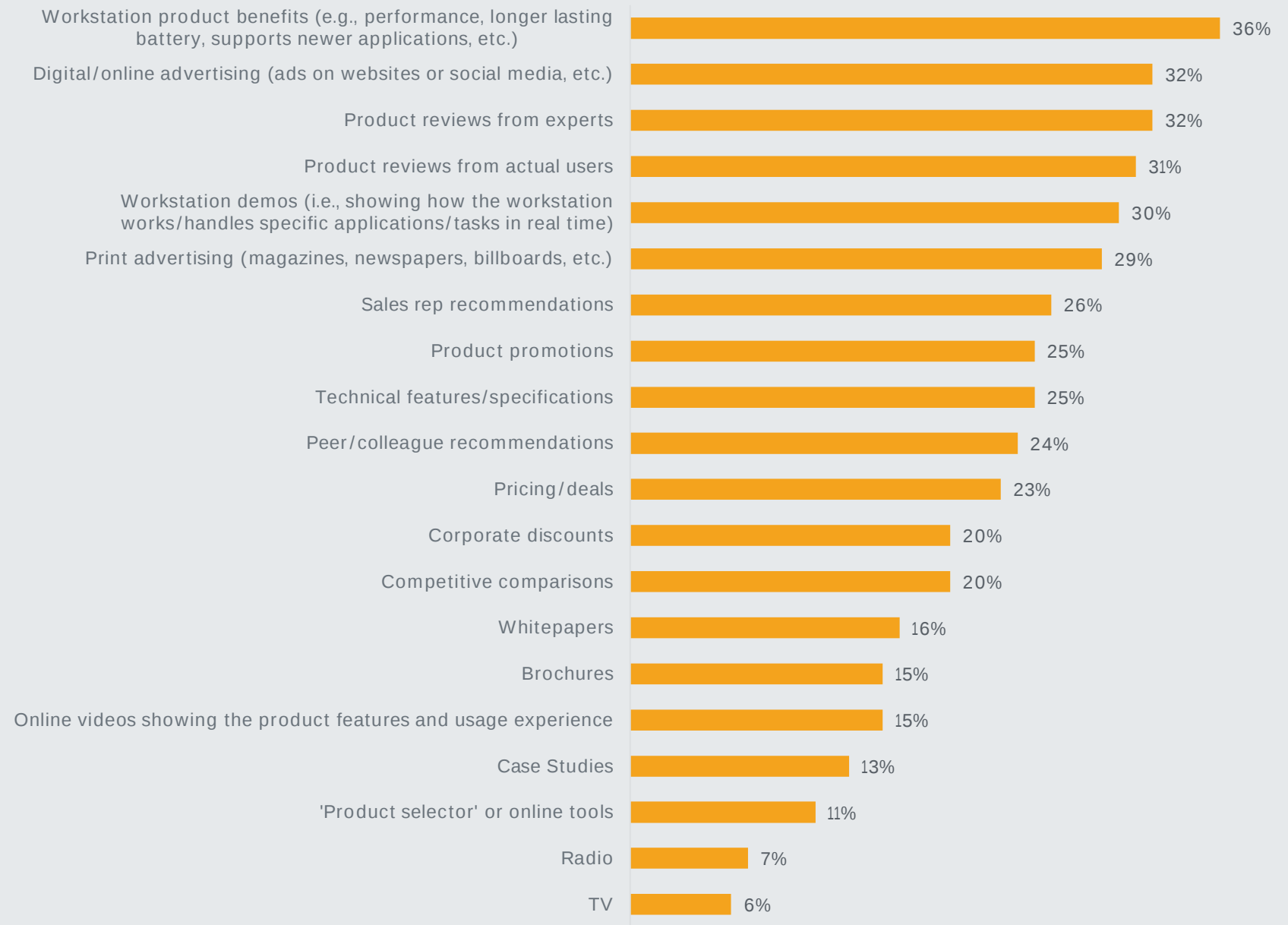
# M&E ITDM: AWARENESS CONTENT TYPES

- Print advertising took the overall lead in a surprising way along with user reviews
- Over-indexes on marketing materials (*advertising, brochures, etc.*), perhaps because it's their industry



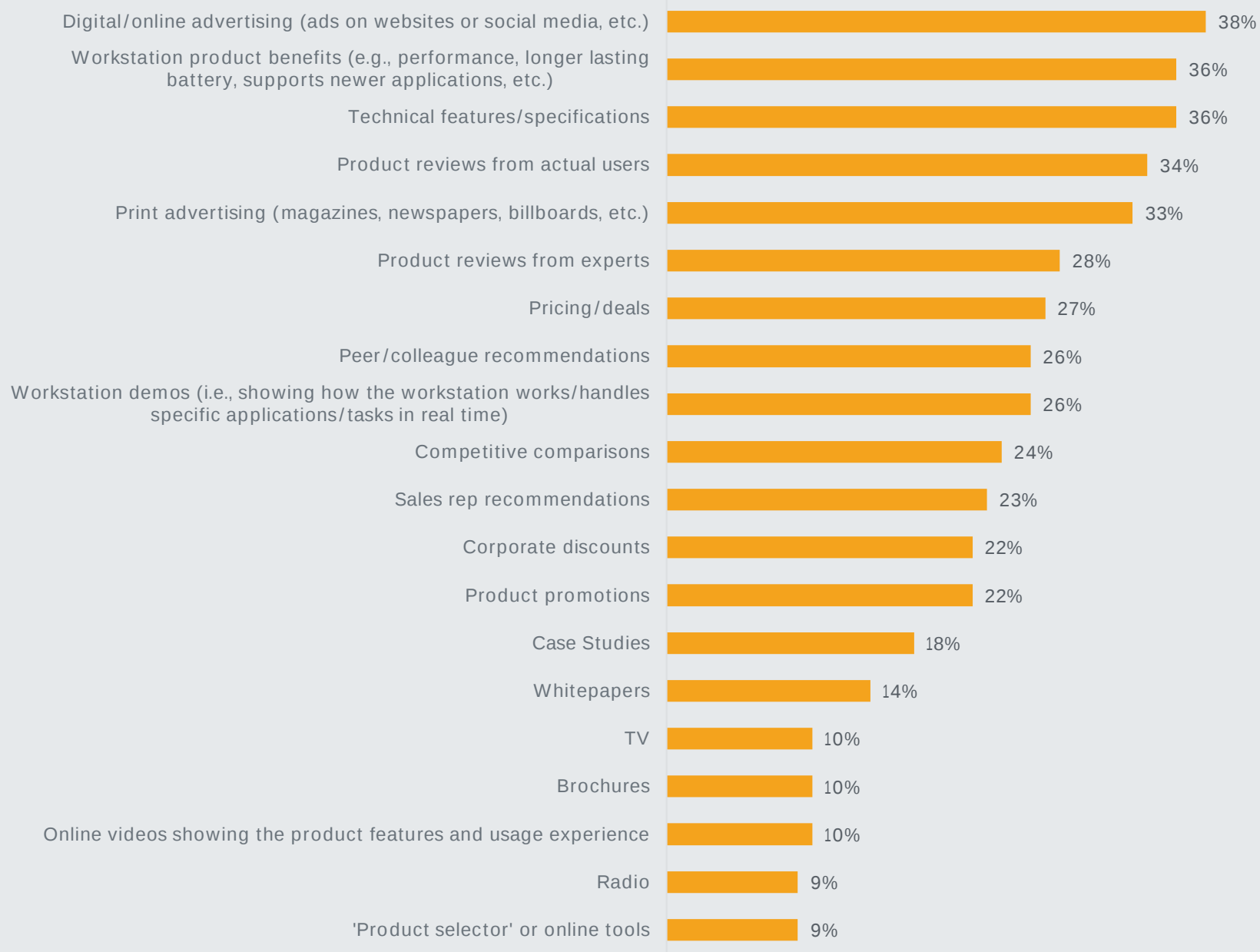
# M&E ITDM: CONSIDERATION CONTENT TYPES

- Product benefits remain very important
- Online advertising now surpasses print advertising
- Expert and user reviews are key along with product demos



# M&E ITDM: PURCHASE CONTENT TYPES

- Digital advertising continues to expand and print advertising increases from consideration phase
- Workstation product benefits, tech specs and user reviews are important



# EMOTIONS EXPERIENCE - MEDIA & ENTERTAINMENT ITDM

## AWARENESS

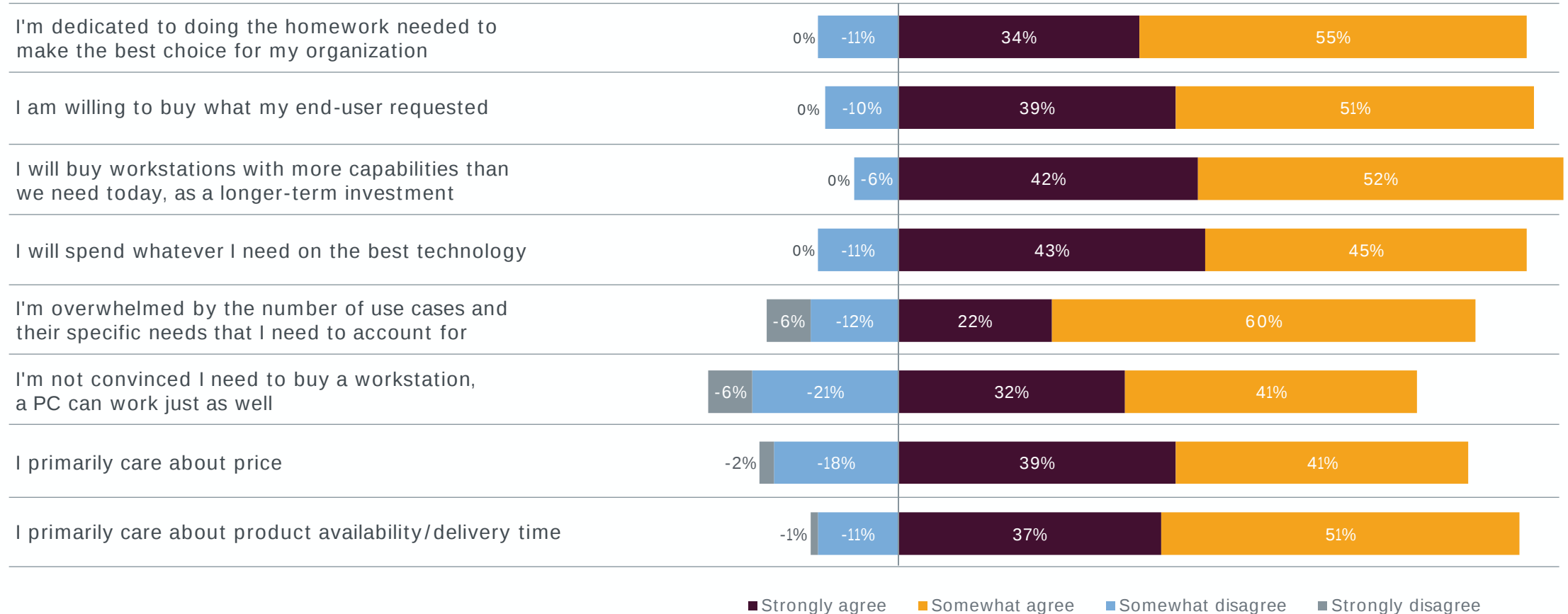
Media/Entertainment buyers are very committed to getting their end users what they asked for or better.  
Significantly more overwhelmed than average, are less confident that needs require a workstation over a desktop.

EMOTIONS  
PROVOKED IN  
QUESTION

POSITIVE



NEGATIVE



Q13: Thinking about these emotions during each phase of your buying process, how strongly do you agree or disagree with each statement?

Source: Dialog AMD Workstation Persona & Buyer's Journey Research, April 2022 - U.S.

# EMOTIONS EXPERIENCE - MEDIA & ENTERTAINMENT ITDM

## CONSIDERATION

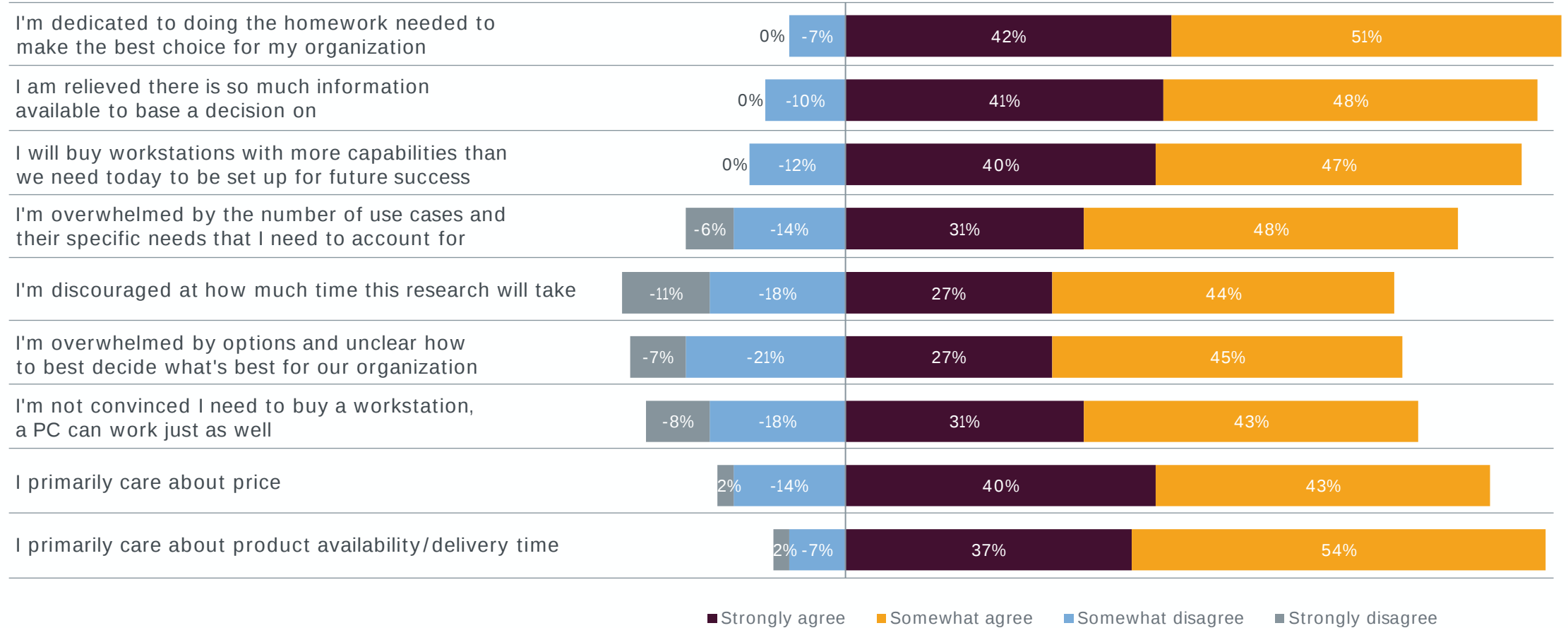
Media/Entertainment buyers stay skeptical and overwhelmed in the Consideration phase.  
Price and availability take some focus as the other elements still seem too confusing.

EMOTIONS  
PROVOKED IN  
QUESTION

POSITIVE



NEGATIVE



Q13: Thinking about these emotions during each phase of your buying process, how strongly do you agree or disagree with each statement?

Source: Dialog AMD Workstation Persona & Buyer's Journey Research, April 2022 - U.S.

# EMOTIONS EXPERIENCE - MEDIA & ENTERTAINMENT ITDM

## PURCHASE

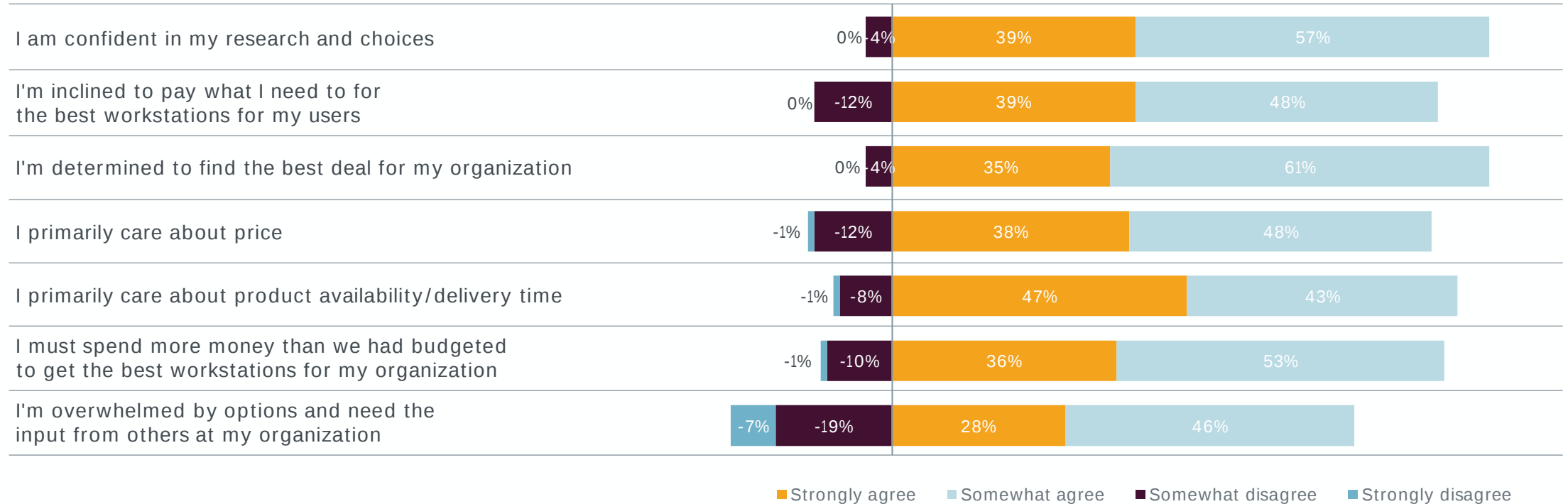
Final decisions made with input from the team. Believe they will spend more than planned. Getting a good deal becomes important.

EMOTIONS  
PROVOKED IN  
QUESTION

POSITIVE



NEGATIVE



Q13: Thinking about these emotions during each phase of your buying process, how strongly do you agree or disagree with each statement?

Source: Dialog AMD Workstation Persona & Buyer's Journey Research, April 2022 - U.S.





# KEY INSIGHTS



## Application-Focused Targets Are More Distinctive than Vertical Targets in Many Cases

- Data Science and 3D Modeling applications have distinct purchasing behaviors across all verticals
- Media & Entertainment vertical is unique for ITDMs
- AMD has an opportunity to focus on a mix of specific applications, verticals, and roles vs. competitors

## Apple Is a Serious Contender

- AMD should pay attention to Apple's marketing. Media & Entertainment have high Apple preference.

## Power Users Act as Influencers within Organizations of All Sizes

- AMD should create content and leverage channels that cater to this technical influencer

## Workstation Applications Are Expected to Continue Moving to the Cloud

- AMD has an opportunity to be a thought leader on this trend via content creation

## Status Quo System Renewals (*Trusted & Known*) Need to Be Disrupted

- AMD can leverage ABM strategies to shift competitor's share





Dialog to share the deck with AMD after making any refinements ASAP.

Dialog creating the buyer's journey maps to represent to AMD  
(to be scheduled in May)

Other?

## Q&A/NEXT STEPS



THANK YOU

Dialog



## ITDM SURVEY OVERVIEW

# BACKGROUND AND METHODOLOGY

A quantitative study was conducted in February – March 2022 in order to define workstation personas and to gain a better understanding of the research, technologies, and emotions shaping the workstation buyer's journey among key target personas.

### FORMAT

Ten-minute online survey including the following topics:

- Persona profiles
- Workstation purchase history
- Channel sources and content touchpoints across buyer's journey
- Emotional states across purchase process
- AMD preference and consideration insights

### PARTICIPANTS

500 U.S. quantitative survey ITDM participants defined by their organization's size and vertical markets:

- Small Corp (50-99) – 100 ITDM
- Med. Corp (100-499) – 100 ITDM
- Large Corp (500-999) – 150 ITDM
- Extra-Large Corp (1K+) – 150 ITDM

Vertical Markets/Segments – 20% weighting

- Design & Manufacturing
- Architects, Engineers, and Construction
- Media & Entertainment
- Financial
- Software and Sciences

### REQUIREMENTS

- Must live in the U.S. or Germany (QS#1)
- Must be 18 – 74 years old (QS#2)
- Must be currently employed by an organization (QS#3)
- Organization must have 50+ employees (QS#4)
- Respondents must work in one of the following industries: Architecture/Construction/Engineering, Design/Manufacturing, Financial Services, Media/Entertainment, or Technology Software/Services (QS#5)
- Must work in one of the following departments: Accounting/Finance, IT, Operations, Purchasing/Procurement, or Lines of Business (QS#6)
- Have a role of Professional Staff or Management (QS#7)
- Participate in technology software and/or hardware decisions (QS#8)
- Responsibility must include being a primary or shared decision-maker for workstation purchases (QS#10)
- Must purchase workstations through a distributor/reseller and/or manufacturer (QS#11)
- Must purchase at least some AMD, Intel, and/or Apple workstations (QS#12)
- Must have some users in the company that use a typical workstation application (QS#13)

## END USER SURVEY OVERVIEW

# BACKGROUND AND METHODOLOGY

A quantitative study was conducted in February – March 2022 in order to define workstation personas and to gain a better understanding of the research, technologies, and emotions shaping the workstation buyer's journey among key target personas.

### FORMAT

Ten-minute online survey including the following topics:

- Persona profiles
- Workstation purchase history
- Channel sources and content touchpoints across buyer's journey
- Emotional states across purchase process
- AMD preference and consideration insights

### PARTICIPANTS

250 U.S. quantitative survey ITDM and End User participants defined by their organization's size and vertical markets:

- Small Corp (50-99) – 125 End Users
- Med. Corp (100-499) – 125 End Users

Vertical Markets/Segments – 20% weighting

- Design & Manufacturing
- Architects, Engineers, and Construction
- Media & Entertainment
- Financial
- Software and Sciences

### REQUIREMENTS

- Must live in the U.S. or Germany (QS#1)
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- Organization must have 50-499 employees (QS#4)
- Respondents must work in one of the following industries: Architecture/Construction/Engineering, Design/Manufacturing, Financial Services, Media/Entertainment, or Technology Software/Services (QS#5)
- Must have a role of Professional Staff or Management (QS#6)
- Must use a workstation as a primary device (QS#7)
- Must have some influence in the purchase of their workstation (QS#8)
- Must use a workstation with an AMD, Intel, or Apple processor (QS#9)

# GLOSSARY OF TERMS

## US Survey Specifics

### Role/title

1. Executive Management (e.g., CEO, CIO, President, etc.)
2. Senior Management (e.g., President, General Manager, VP, etc.)
3. Management (e.g., Director, Manager, Supervisor, etc.)
4. Professional Staff (e.g., Assistant Manager, Office Manager)

**OEM:** Dell, Lenovo, HP, Acer, ASUS, Apple, Fujitsu, Local System Integrator

**Processor Brand:** AMD, Apple, Intel

### Application/Outputs

1. Rendering
2. 3D Modeling & Design
3. Post-production
4. Simulation
5. Software Development
6. Data Science
7. Petroleum E&P
8. CAD
9. Virtual Reality

### Content Sources:

#### OEM Information

1. OEM Websites (e.g., HP.com, Lenovo.com, Dell.com, etc.)
2. Processor websites (e.g., AMD.com, Intel.com)
3. Press releases

#### Reseller Channel Communications

1. Partner/reseller sales rep recommendations
2. Partner/reseller website/portal
3. Partner/reseller emails

#### 3rd Party

1. Analyst/benchmark reports (Gartner, Forrester, etc.)
2. Relevant-industry associations for your organization's area of focus (healthcare, government, retail, etc. associations)

### 1. Digital

2. Search engines/online searches
3. YouTube/video
4. Podcasts

### 5. Experiential

6. Peer/colleague recommendations
7. Events/webinars (either virtual or in-person)
8. Demo units

### Content Types

#### Reviews

1. Product reviews from experts
2. Product reviews from actual users

#### Other types of information

1. PC demos (i.e., showing how the PC works/handles specific applications/tasks in real time)
2. "Product selector" or online tools
3. Online videos showing the product features and usage experience

#### Peer/colleague recommendations

#### Detailed product information

1. Technical features/specifications
2. PC product benefits (i.e., faster, longer lasting battery, supports newer applications, etc.)
3. Competitive comparisons
4. Pricing/deals
5. Brochures
6. Case Studies
7. Whitepapers

#### Partner/Reseller direct communications

1. Product promotions
2. Sales rep recommendations
3. Corporate discounts

#### Advertising

1. Digital/online advertising (ads on websites or social media, etc.)
2. Print advertising (magazines, newspapers, billboards, etc.)
3. TV
4. Radio



GREATER  
DETAIL ON  
KEY INSIGHTS

# APPLICATIONS-FOCUSED TARGETS ARE MORE DISTINCTIVE THAN VERTICAL TARGETS IN MANY CASES

- Data Science and 3D Modeling/Design applications have distinct purchasing behaviors for targeting across all verticals/segments based on survey finding
- Performance was more important to the Data Science buyers versus other personas in 1:1 interviews and survey findings
- Data Science workloads were referenced as challenging the compute capacity of existing solutions
- Application-focused IT experts might be another influencer in the mix
- 3D workloads are becoming more ubiquitous across verticals

AMD should see both Data Science and 3D Modelling/Design as unique targeting opportunities and create campaigns and marketing materials appealing to these applications.

“A lot of reports are huge CSV files that don’t open in Excel anymore. That’s happening more and more.”  
- CTO, Analytics

“There’s a bunch of things I’m doing at once. Running CFD and working while the simulation is running for hours.”  
- Owner/Head Designer, Manufacturing

# APPLICATIONS-FOCUSED TARGETS ARE MORE DISTINCTIVE THAN VERTICAL TARGETS IN MANY CASES

- Many decision-makers see workstation performance with an “application first” lens
- IT organizations are building expertise this way
- Where multiple applications are supported, workstations are tiered with various degrees of granularity
- Decision-makers said application-focused marketing was more effective vs. general or vertical

AMD should focus on application and specific use-case marketing where possible.

“We reach out to team leads and ask for software requirements. We don't ask them for the hardware because that's not what their expertise.”

- Program Manager, Software Development

“There's a subgroup in the org with a good understanding of application architecture, systems, plans, etc. They're on point for each application.”

- VP of IT, Financial Services

“We used to benchmark but there's almost no point except to see it in the performance of the tools we use. Fire up Houdini and see how it does.”

- Owner/CTO, Visual Effects

## APPLE IS A SERIOUS CONTENDER

- Apple has a stronger preference and purchasing presence than anticipated
- Media & Entertainment vertical IT decision-makers had a large Apple processor preference
- Apple is still a default platform for video editing and remains sticky with other post-production workloads
- Some customers indicated Apple was relying on brand and legacy vs. real compute innovation

AMD should pay attention to Apple's marketing. This also intersects with need to be in more devices, as beating Apple will always be about style and substance. Being easy to work and partner with is also a way to win vs. Apple.

"Apple tends to be a little cocky because the Apple platforms have not always been the best."

- Sr. Artist, Media & Entertainment

"Apple is all about style. A Mac will win you style points, which you know for a design firm style points go for a lot."

- VP of IT Architecture

"Its brand is so strong among creative types, abandoning the platform might create some unwanted backlash that could affect the products and markets it does care about."

- Peedie Report

## POWER USERS ACT AS INFLUENCERS WITHIN ORGANIZATIONS OF ALL SIZES

- Power users are shaping the purchase process in companies of all sizes by serving as an influencer/resource to other users and IT via their trusted network
- Decision-makers rely on these users to help identify, understand, and evaluate new technology
- Power users are typically application experts and sometimes become IT decision makers
- They negotiate on behalf of the business in informal technical fact-gathering and analysis

AMD should create content and leverage channels that cater to technical influencers with an application-first focus to accommodate the dynamic blend of domain and tool expertise that drive power user's status.

“They bring their needs to another user who is a super user, who filters that information through their network from 10 years in the industry.”  
- VP of IT, Publishing

“Many times, those shiny system things are just a first impression and until we can confirm it with someone we trust, it's unknown.”  
- CTO, Analytics Startup

## WORKSTATION APPLICATIONS ARE EXPECTED TO CONTINUE MOVING TO THE CLOUD

- Platform advances and the shift to remote workers has driven increased virtualization of workloads
- Advanced cloud computing (off prem) ranked high as a top technology priority in survey findings
- This is impacting workstation decision-making in two ways:
  - Allows organizations to leverage lighter-weight workstations complemented with on-demand cloud when heavier work is required
  - Enables organizations to break the cyclical need to buy new hardware to meet escalating client requirements, moving from CapEx to OpEx

AMD has an opportunity to be a thought leader on this trend via content creation around applications shifting to the cloud. The cloud must also now be seen part of the competitive set

“It’s something we started a few years ago, and not just for rendering, but for the developers, too.”

- Director of IT, Insurance

“When they need additional compute capabilities, they can hop onto a virtual desktop with high-end performance.”

- Director of IT, Architecture

“We are already using some cloud workloads for that purpose, but we’re not completely there yet.”

- Sr. IT Architect, Construction

## STATUS QUO SYSTEM RENEWALS (TRUSTED & KNOWN) NEED TO BE DISRUPTED

- As to be expected, many organizations' workstation refreshes are simply upgrades in place, a return to last model (OEM + CPU) and spec from there
- Decision-makers also generally indicated that shifting OEMs would be a much steeper obstacle to overcome vs. shifting CPU
- There are exceptions, typically those upgrades that are off-cycle or driven by net, new business needs
- Large organizations highly prioritize KNOWN and TRUSTED in the survey

AMD must target organizations who are looking at large upgrades. AMD should focus on an ABM strategy to target company's who have historically been renewing Intel contracts with new communications and offers to encourage making a change.

"My current machine is a Dell Precision 5510. I believe I have a new Precision mobile 7560 at the office waiting to be set up. Very predictable."

- Sr. Engineering, Manufacturing

"The equipment we buy from Dell comes standard with Intel. Every exception means more steps in the process, and the fewer extra steps for me the better."

- Program Manager, Finance



ADDITIONAL  
PERSONA  
SLIDES

# Data Science End User

Application/Output-Focused Across Verticals

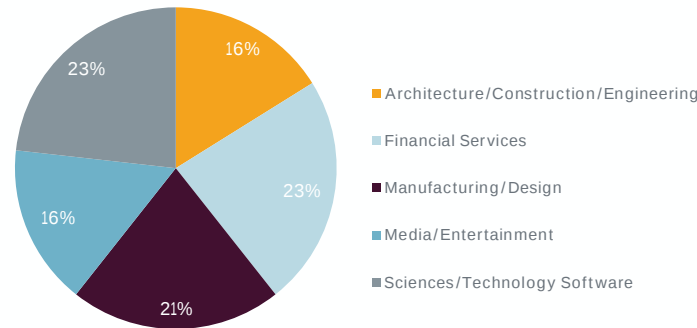
Janice,  
Data Scientist



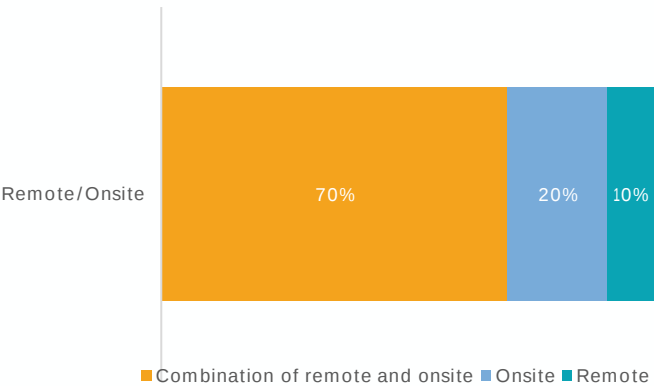


# DATA SCIENCE END USER

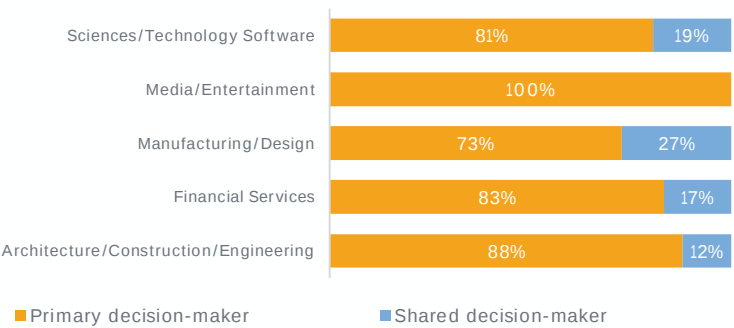
Vertical Markets



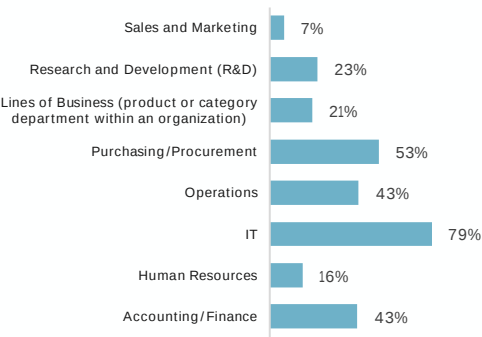
Work Environment



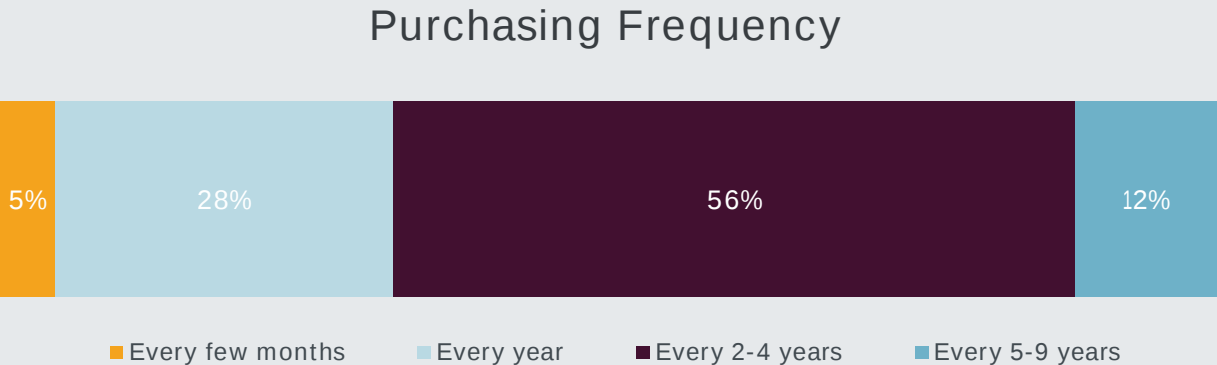
End User role by industry



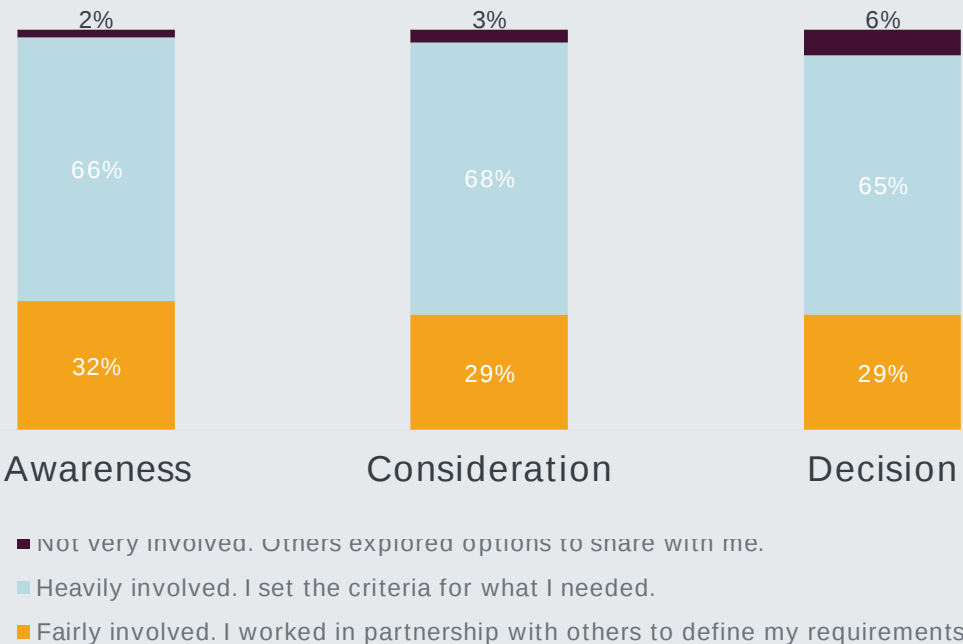
Groups/Individuals Participating in Workstation Buying Decisions



# DATA SCIENCE: PURCHASING FREQUENCY & INVOLVEMENT IN PROCESS



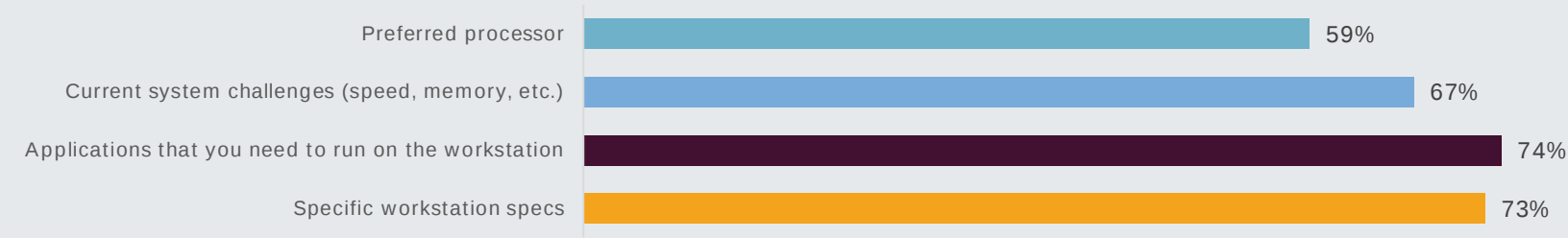
### End User Involvement in Process



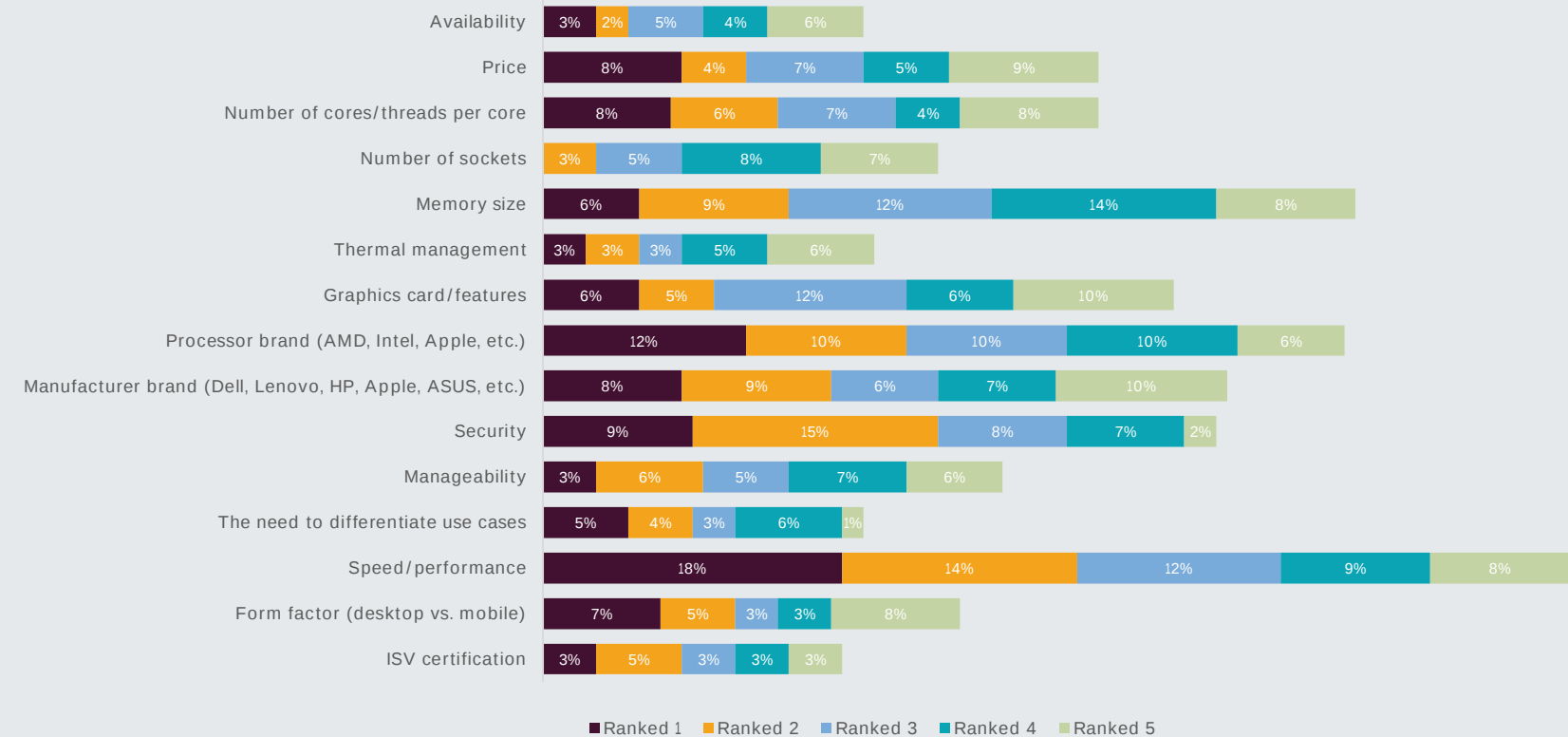
Q7. How often do you typically need/request to get a new workstation?  
Q8. Thinking about the first phase of your buying process, how involved were you at this stage of your workstation purchase where you were beginning to define the criteria/requirements for potential workstations to buy?  
Q9. Thinking about the second phase of your buying process, how involved were you at this stage in comparing and evaluating different workstations to narrow down your options?  
Q10. Thinking about the third phase of your buying process, how involved were you at this stage in making the final workstation product purchase for your job function's criteria?  
Source: Dialog AMD Workstation Persona & Buyer's Journey Research, April 2022 - U.S.

# DATA SCIENCE: WORKSTATION NEEDS PROVIDED TO IT & CRITERIA

Workstation Needs/Requirements Provided to IT



Top 5 Criteria When Starting Workstation Buying Process



Q2. Which of the following do you provide (if any) to your manager or IT contact regarding your workstation needs/requirements?  
Q3. Thinking about the purchase of your workstation, what top 5 criteria did you have in mind when you started the workstation buying process?  
Source: Dialog AMD Workstation Persona & Buyer's Journey Research, April 2022 - U.S.

# Medium/Small “Power” End User

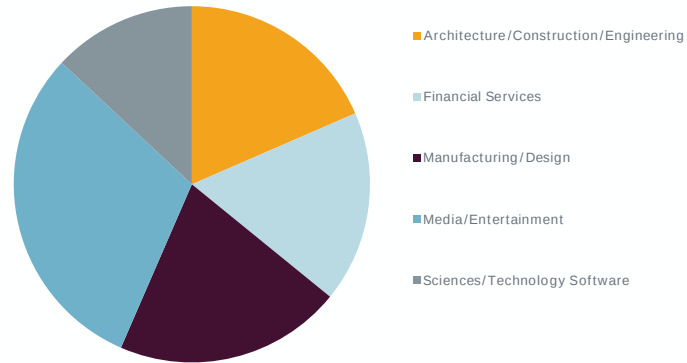
Across Verticals

Alex,  
Senior Manager

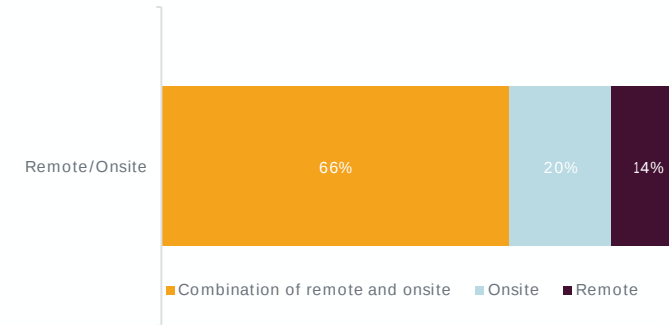


# MED/SM “POWER” END USER

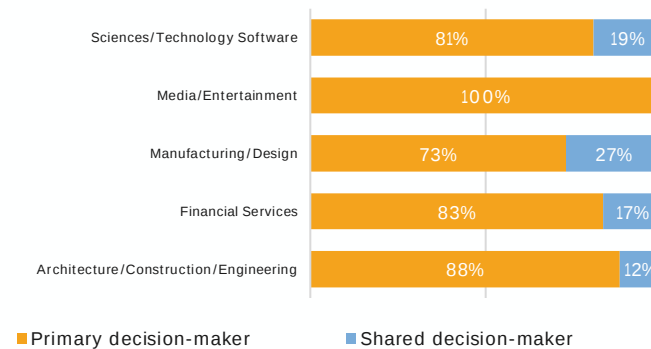
Vertical Markets



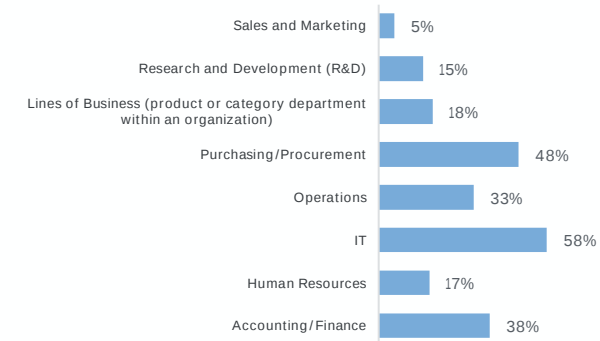
Work Environment



End User DM Role by Industry



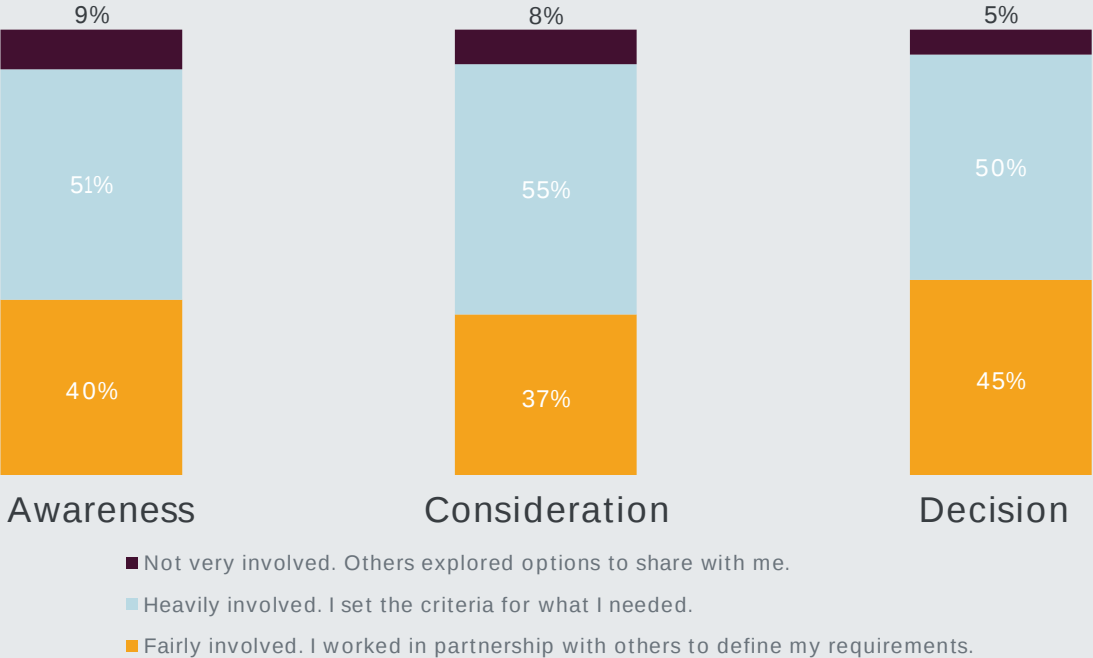
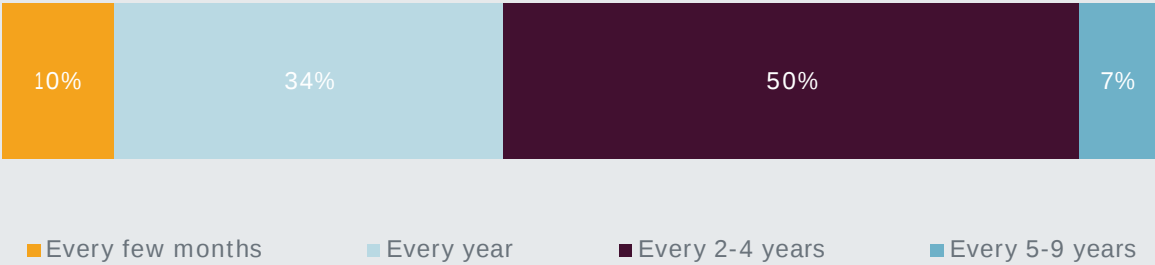
Groups/Individuals Participating in Workstation Buying Decisions



# MED/SM POWER END USER: PURCHASING FREQUENCY & INVOLVEMENT IN PROCESS

End User  
Involvement  
in Process

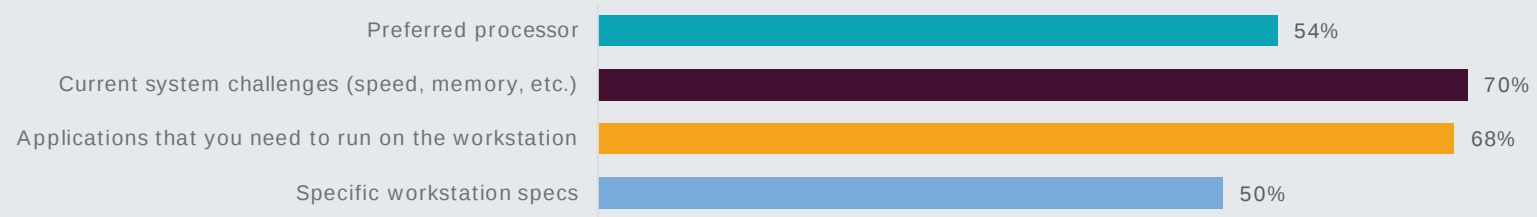
Purchasing Frequency



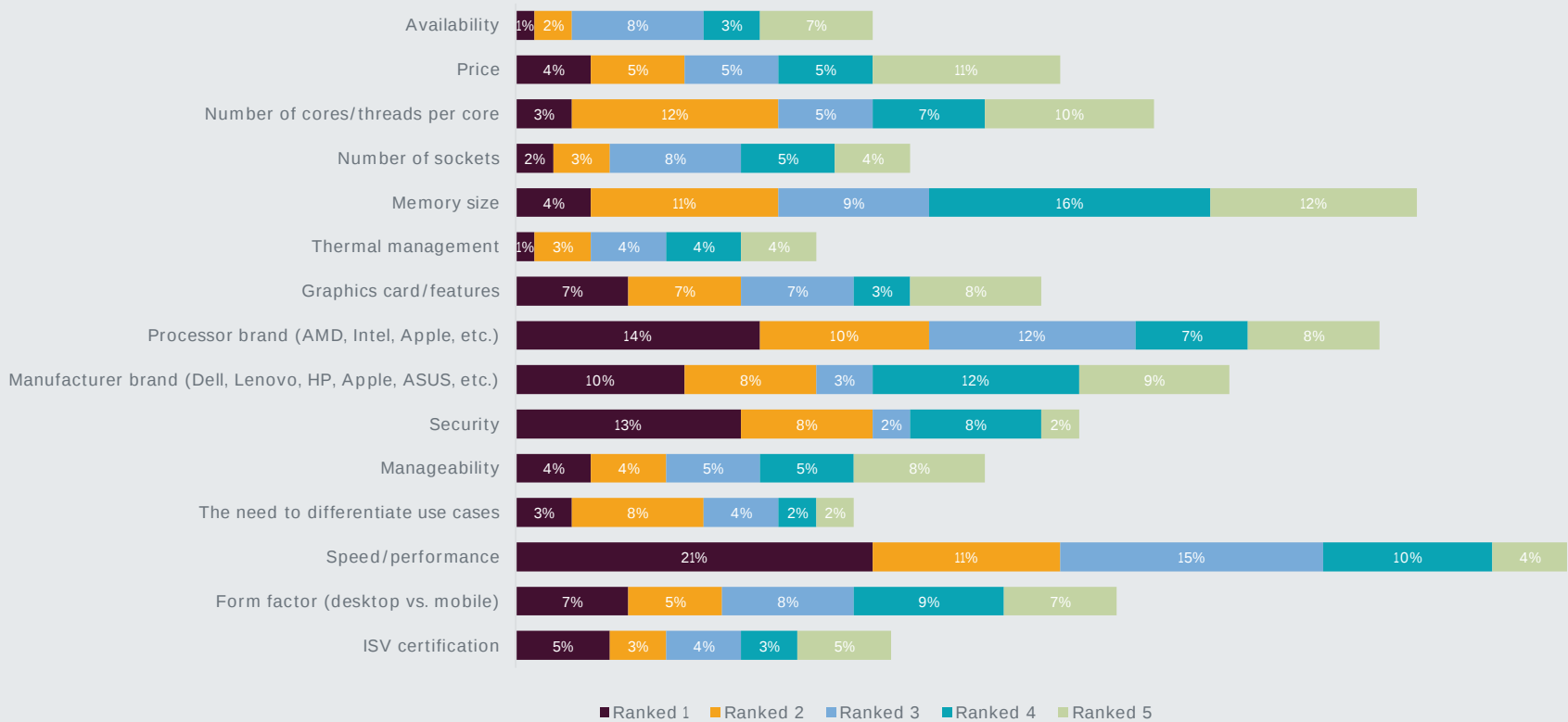
Q7. How often do you typically need/request to get a new workstation?  
Q8. Thinking about the first phase of your buying process, how involved were you at this stage of your workstation purchase where you were beginning to define the criteria/requirements for potential workstations to buy?  
Q9. Thinking about the second phase of your buying process, how involved were you at this stage in comparing and evaluating different workstations to narrow down your options?  
Q10. Thinking about the third phase of your buying process, how involved were you at this stage in making the final workstation product purchase for your job function's criteria?  
Source: Dialog AMD Workstation Persona & Buyer's Journey Research, April 2022 - U.S.

# MED/SM POWER END USER: WORKSTATION NEEDS PROVIDED TO IT & CRITERIA

Workstation Needs/Requirements Provided to IT



Top 5 Criteria When Starting Workstation Buying Process



Q2. Which of the following do you provide (if any) to your manager or IT contact regarding your workstation needs/requirements?  
Q3. Thinking about the purchase of your workstation, what top 5 criteria did you have in mind when you started the workstation buying process?  
Source: Dialog AMD Workstation Persona & Buyer's Journey Research, April 2022 - U.S.

# 3D Modeling & Design End User

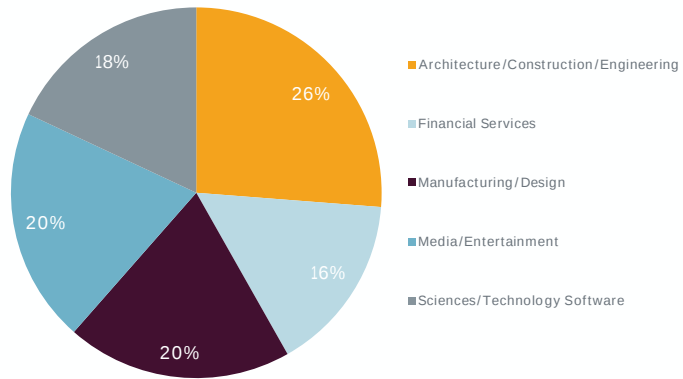
Application/Output-Focused Across Verticals

Renee,  
3D Modeling Artist, Film

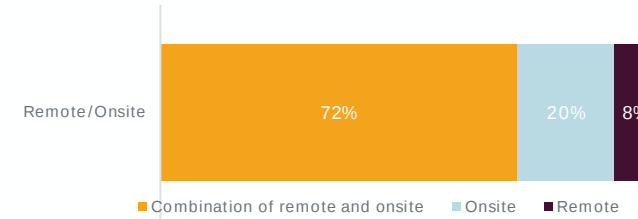


# 3D MODELING & DESIGN END USER

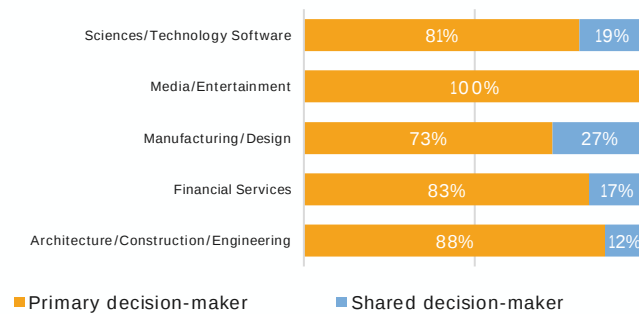
Vertical Markets



Work Environment



End User DM Role by Industry



Groups/Individuals Participating in Workstation Buying Decisions

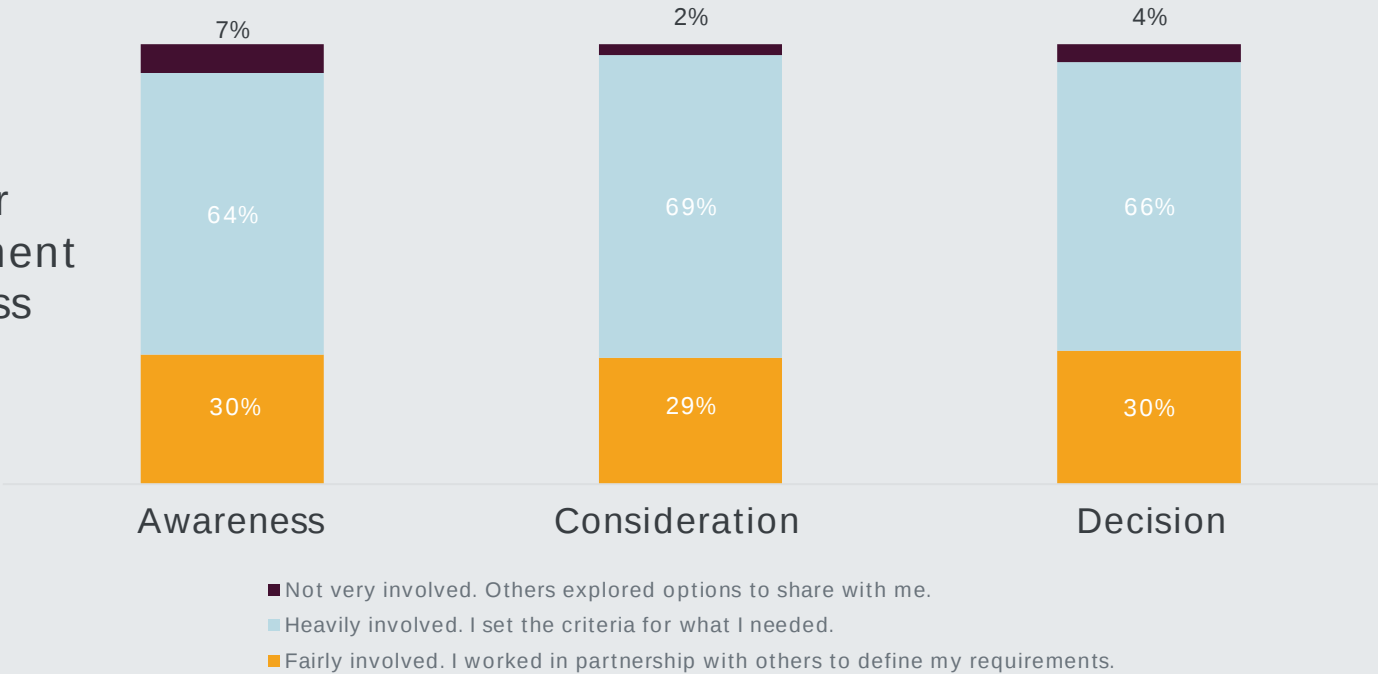


# 3D MODELING & DESIGN: PURCHASING FREQUENCY & INVOLVEMENT IN PROCESS

Purchasing Frequency



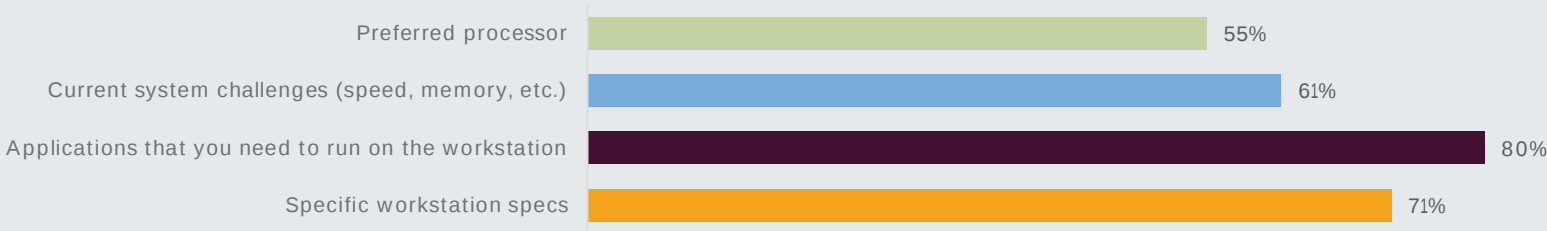
End User  
Involvement  
in Process



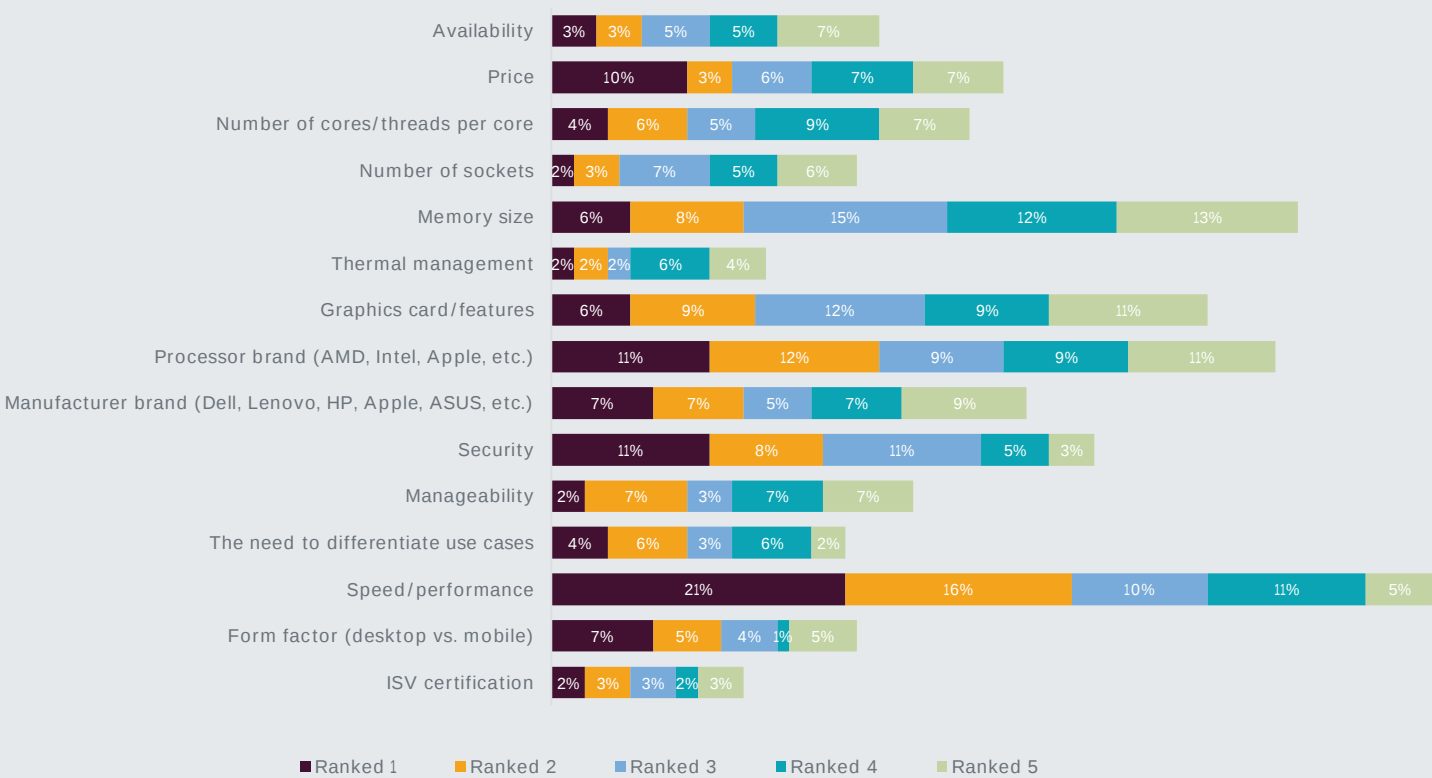
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Source: Dialog AMD Workstation Persona & Buyer's Journey Research, April 2022 - U.S.

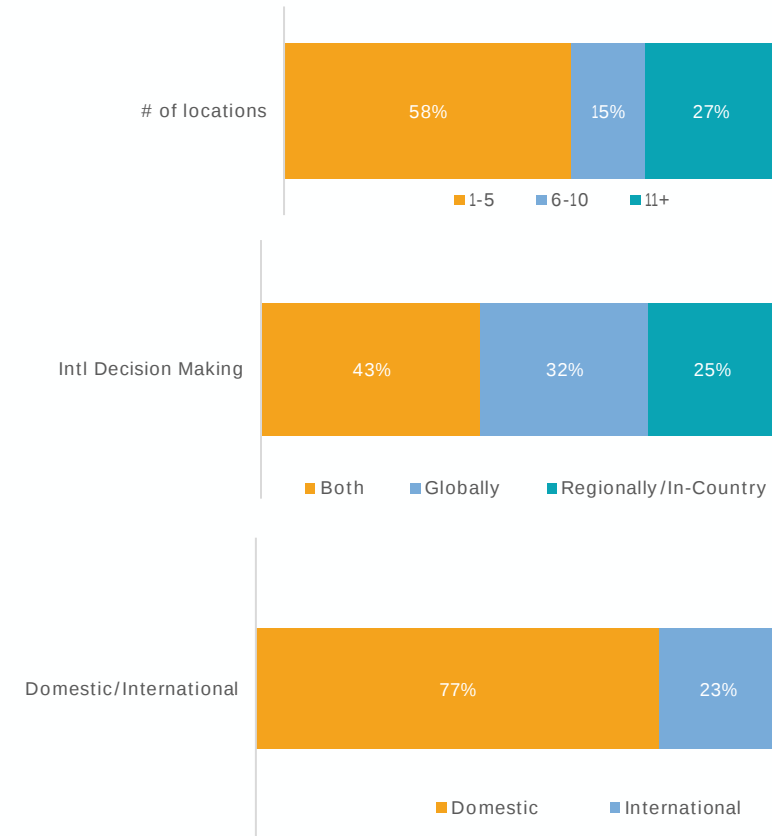
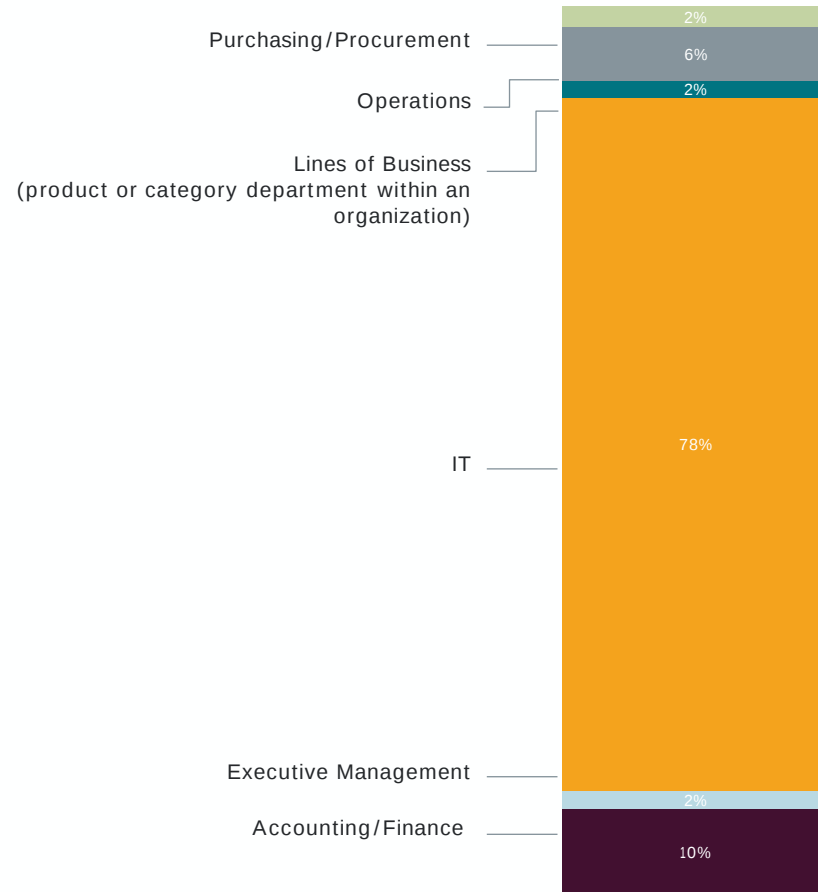
# XL/Large ITDM

Jim,  
Chief Information Officer





# ITDM - XL/LARGE - ROLE & COMPANY BREAKDOWN



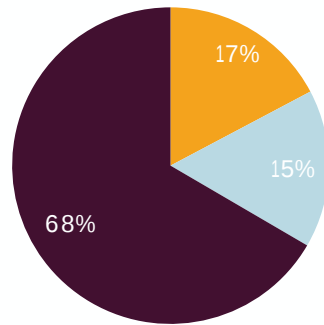


ITDM - ACROSS COMPANY SIZES

# PURCHASE DRIVERS, PRIORITIES, AND PROCESSOR PREFERENCES

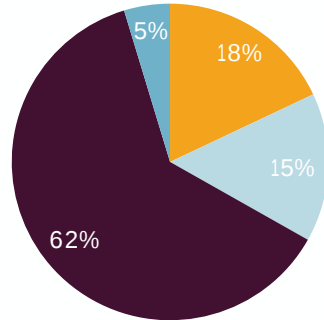
Which Processor Brand Do You...

Prefer?



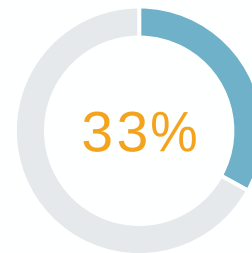
■ AMD ■ Apple ■ Intel

Purchase?

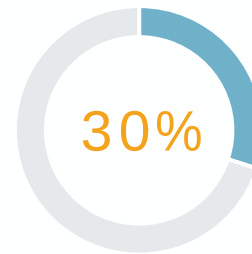


■ AMD ■ Apple ■ Intel ■ No preference

Top Workstation Purchase Drivers

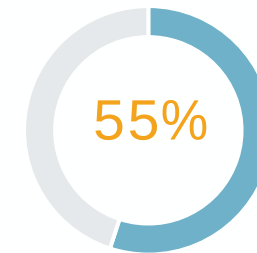


Speed/Performance

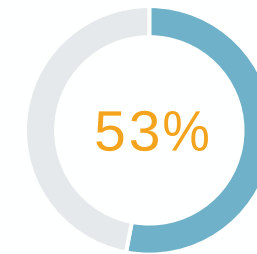


Security

Top Organizational Priorities



Align IT Performance Metrics to Business Outcomes



Increase Innovation

QS12: Which of the following processors do you purchase for your organization's workstations?

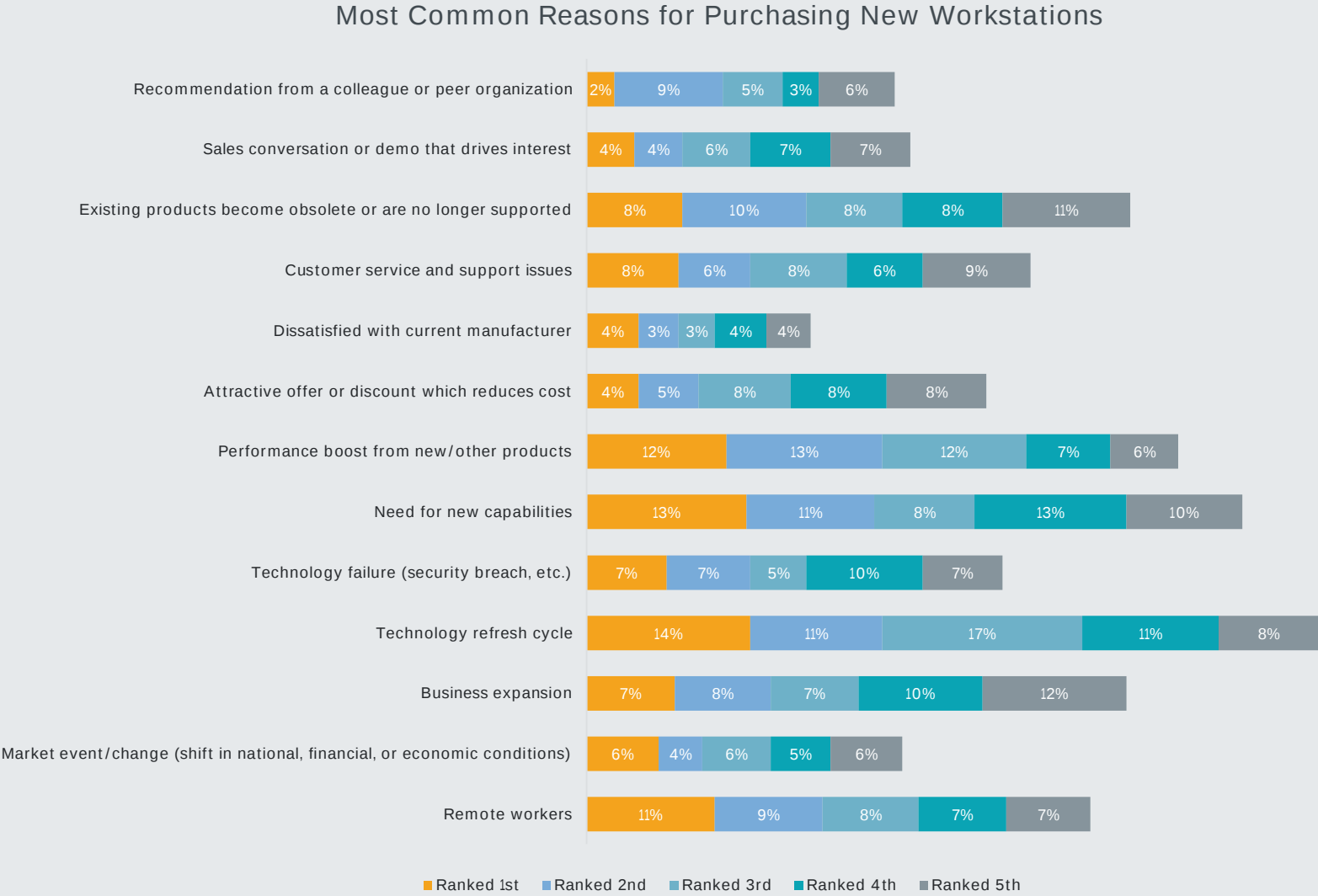
Q6: Which processor brand would you prefer for workstations in your organization?

Q8a: Rank the top 2 criteria you had in mind when you started the workstation buying process.

QS1: Please rank your organizations' top two technology priorities.

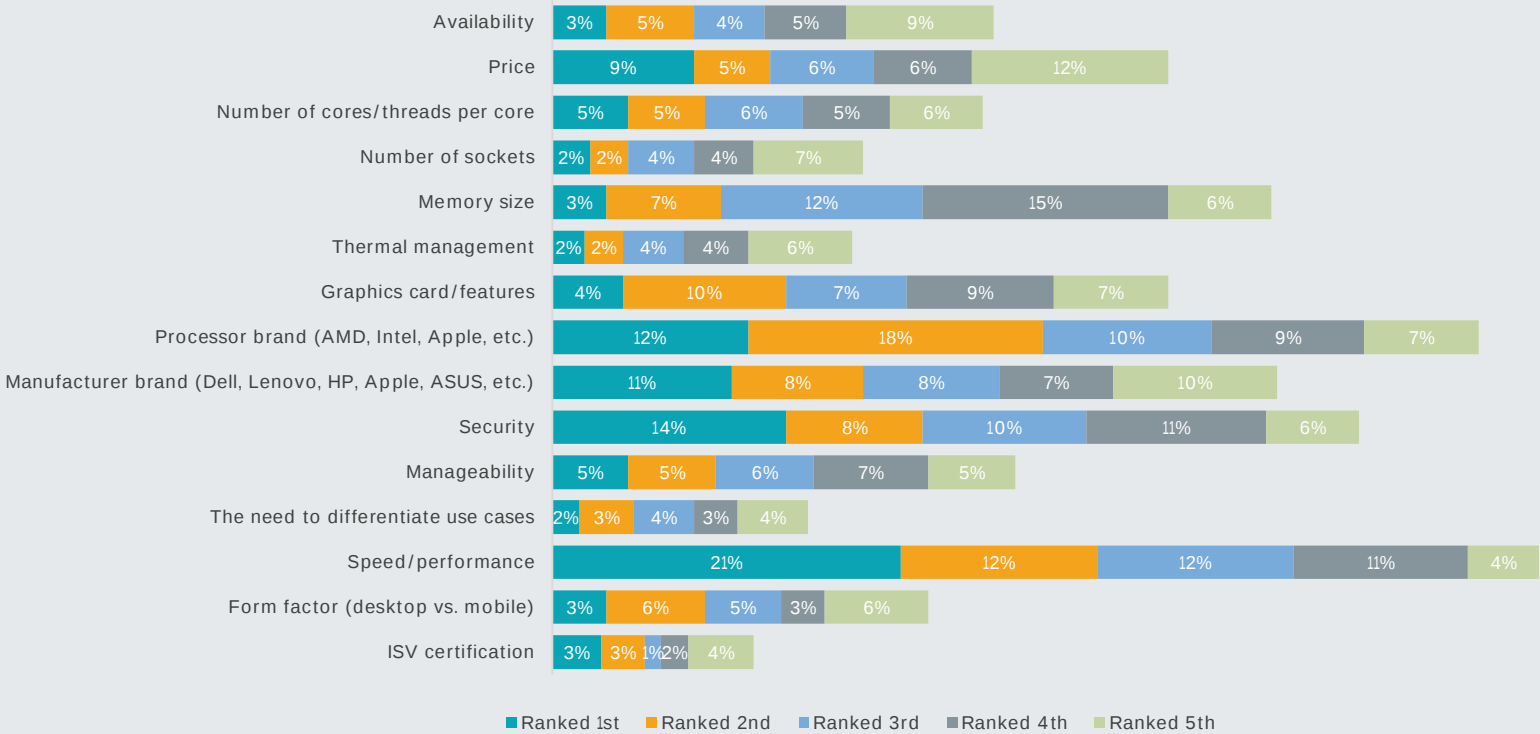
Source: Dialog AMD Workstation Persona & Buyer's Journey Research, April 2022 - U.S.

# XL/L ITDM: WORKSTATION PURCHASING TIMING AND DRIVERS

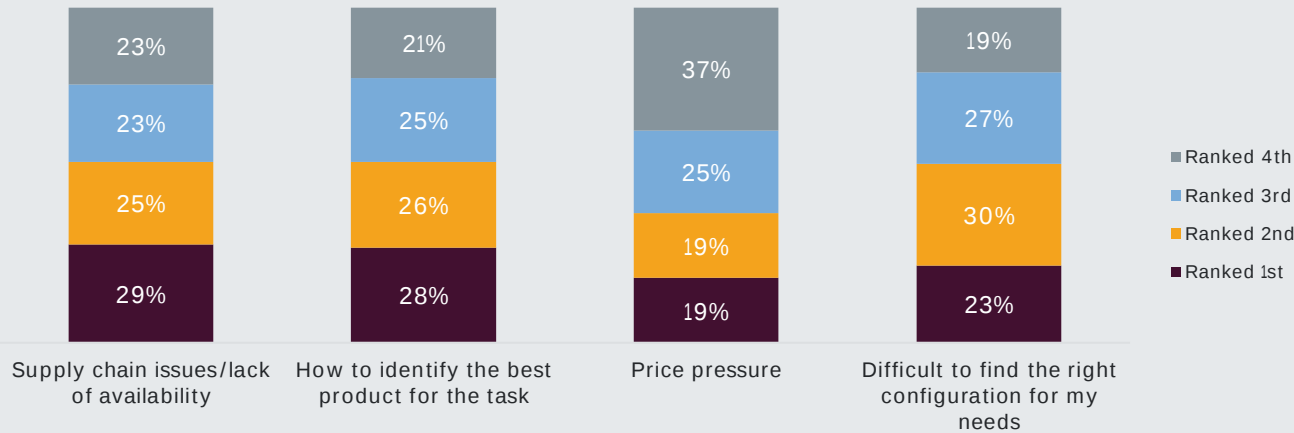


# XL/L ITDM: PROCESSOR CONSIDERATIONS & CHALLENGES

## Top 5 Criteria for Initial Workstation Purchase Considerations

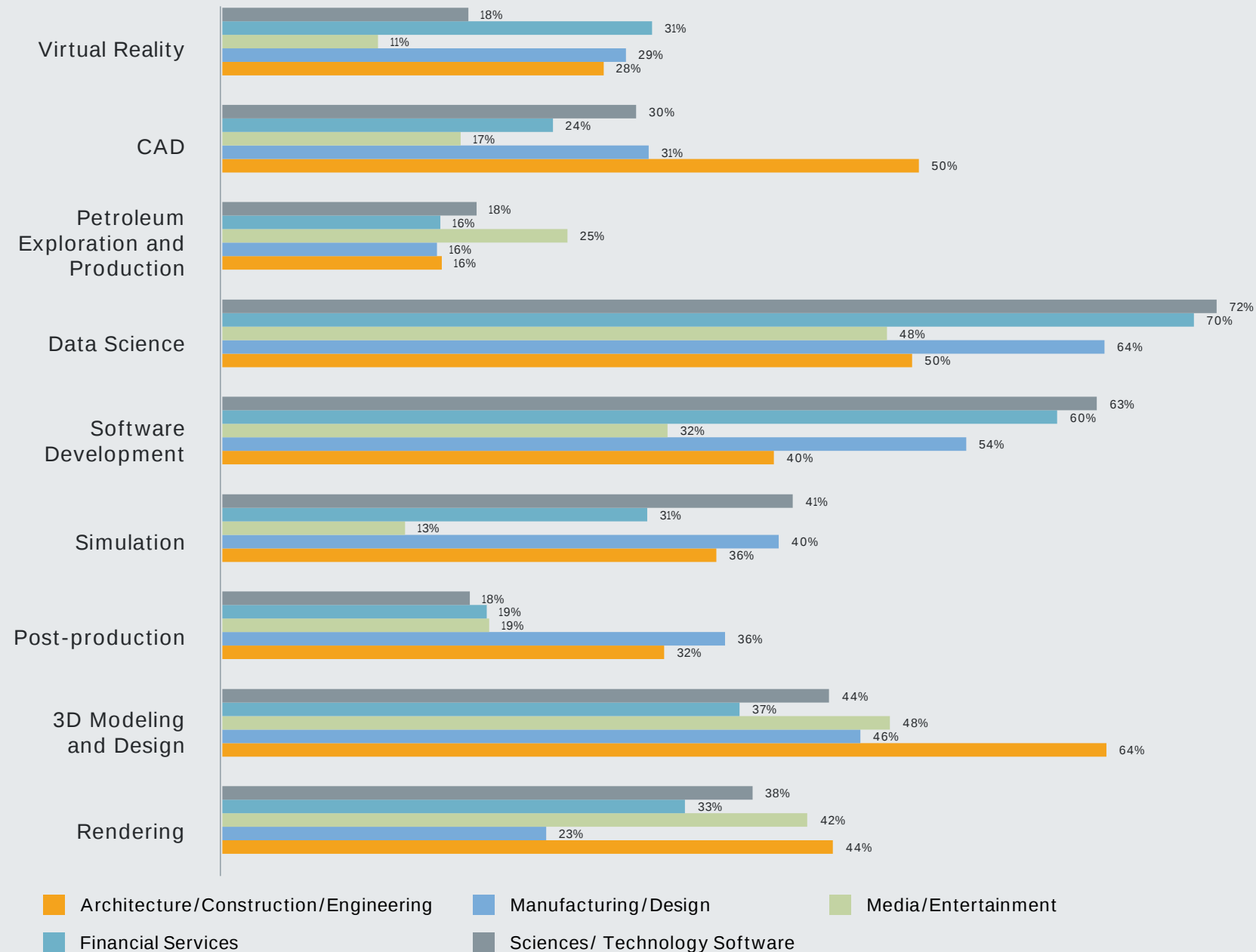


## Top Challenges to Workstation Purchases



Q7. Please rank the top challenges your organization faces when purchasing workstations in order of priority. (RANK 1)  
Q8a. Rank order the top 5 criteria you had in mind when you started the workstation buying process.

# XL/L ITDM: APPLICATIONS/ USAGE BY SEGMENT



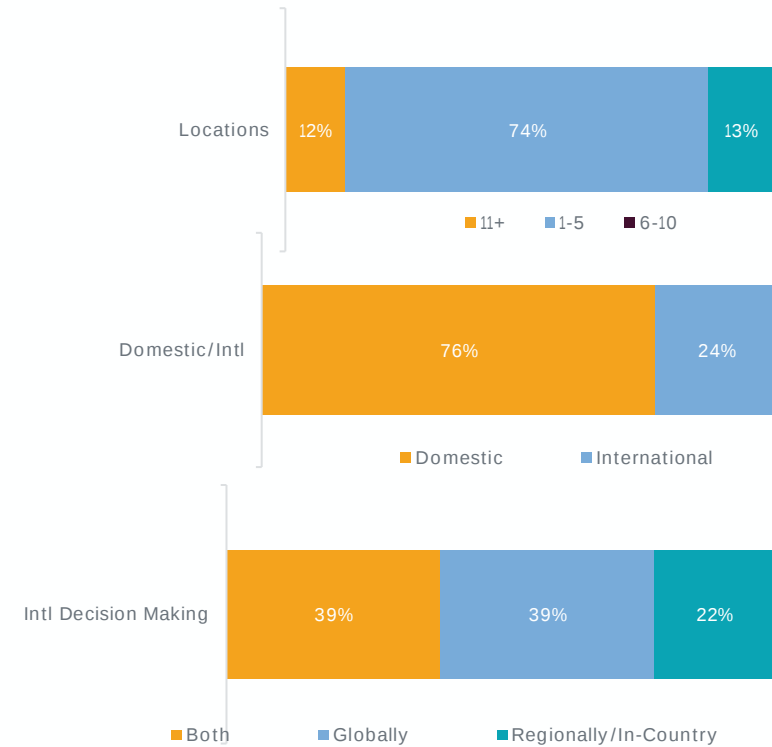
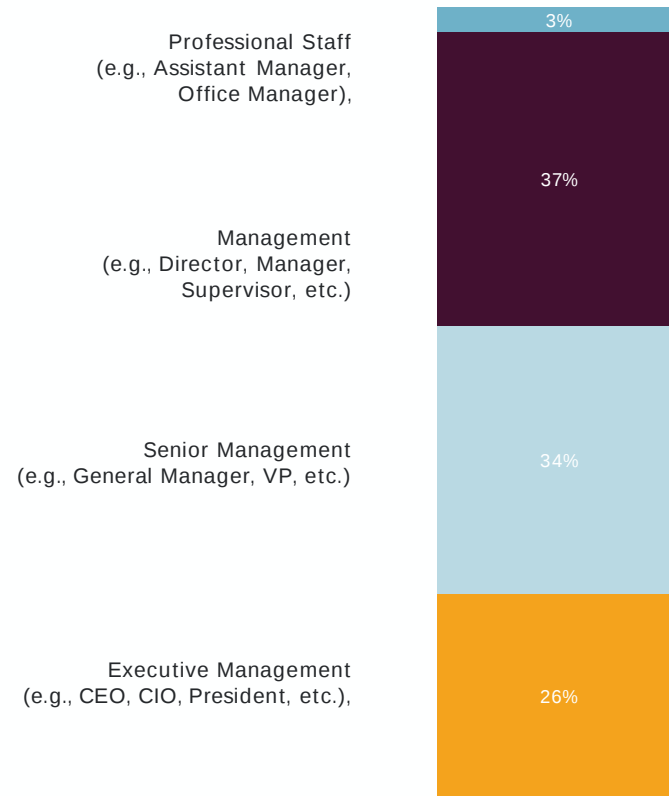
# Media and Entertainment Vertical ITDM

Lucy,  
IT Director





# MEDIA AND ENTERTAINMENT VERTICAL ITDM



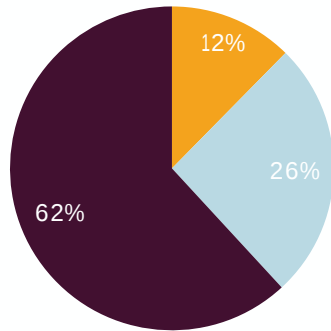


## MEDIA & ENTERTAINMENT VERTICAL ITDM

# PURCHASE DRIVERS, PRIORITIES, AND PROCESSOR PREFERENCES

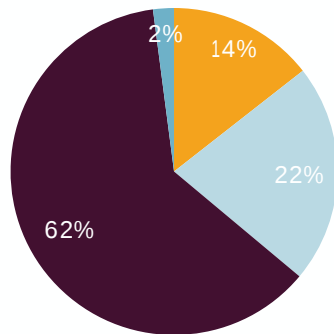
Which Processor Brand Do You...

Purchase?



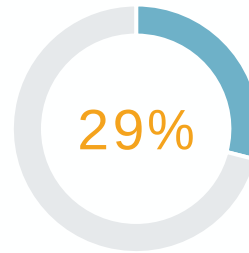
■ AMD ■ Apple ■ Intel

Prefer?

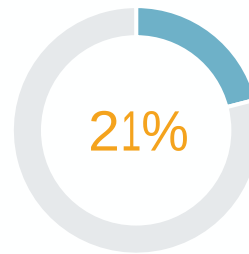


■ AMD ■ Apple ■ Intel ■ No Preference

Top Workstation Purchase Drivers

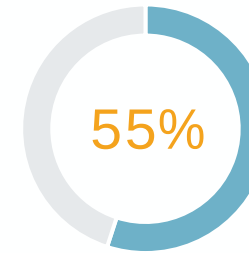


Processor Brand

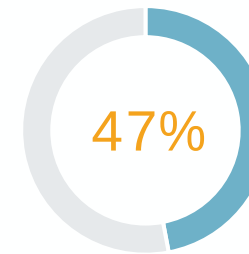


Manufacturer Brand

Top Organizational Priorities



Increase innovation



Align IT Performance Metrics with Business Outcomes

QS12: Which of the following processors do you purchase for your organization's workstations?

Q6: Which processor brand would you prefer for workstations in your organization?

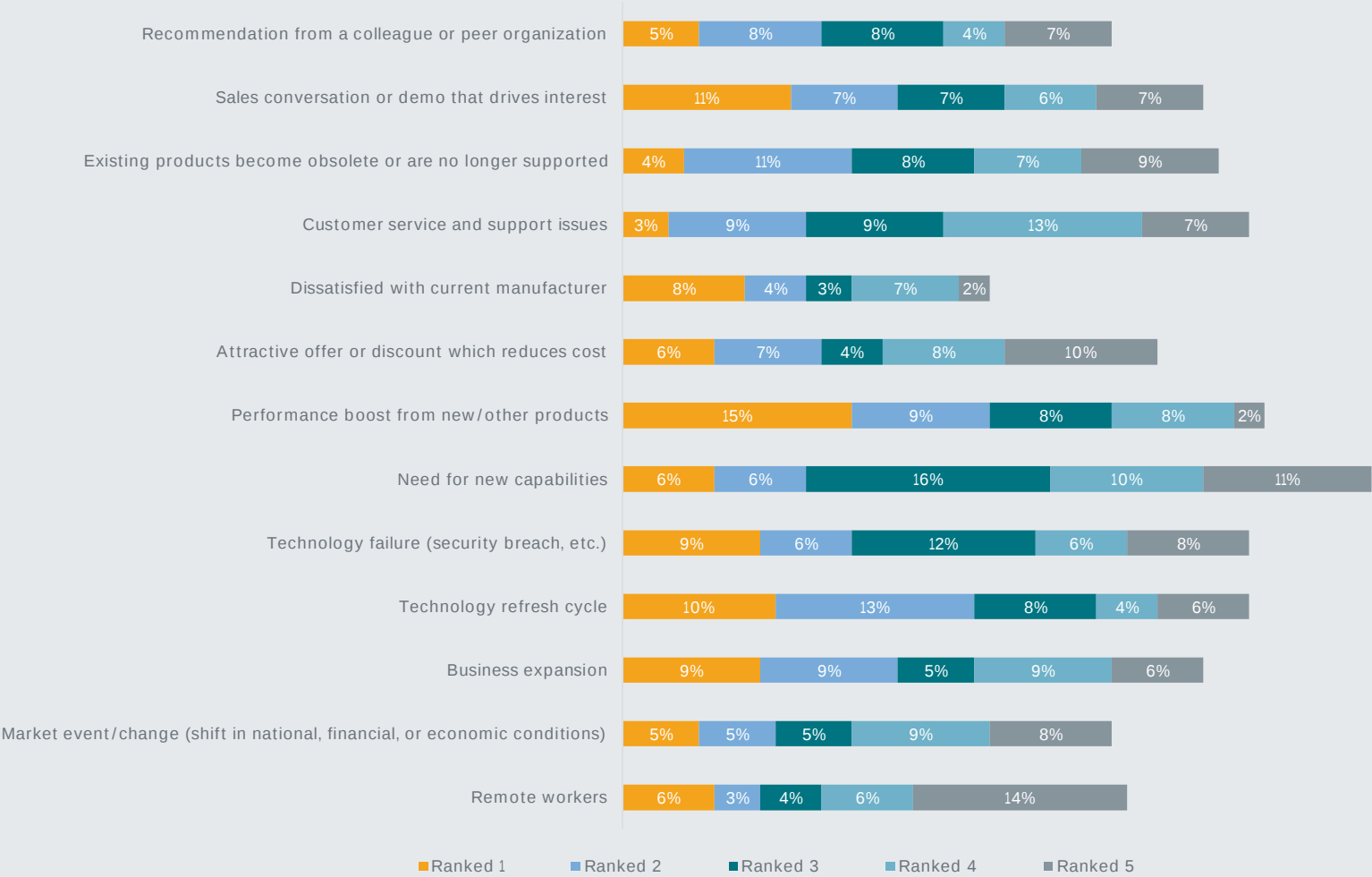
Q8a: Rank the top 2 criteria you had in mind when you started the workstation buying process.

Q1: Please rank your organizations, top two technology priorities.

Source: Dialog AMD Workstation Persona & Buyer's Journey Research, April 2022 - U.S.

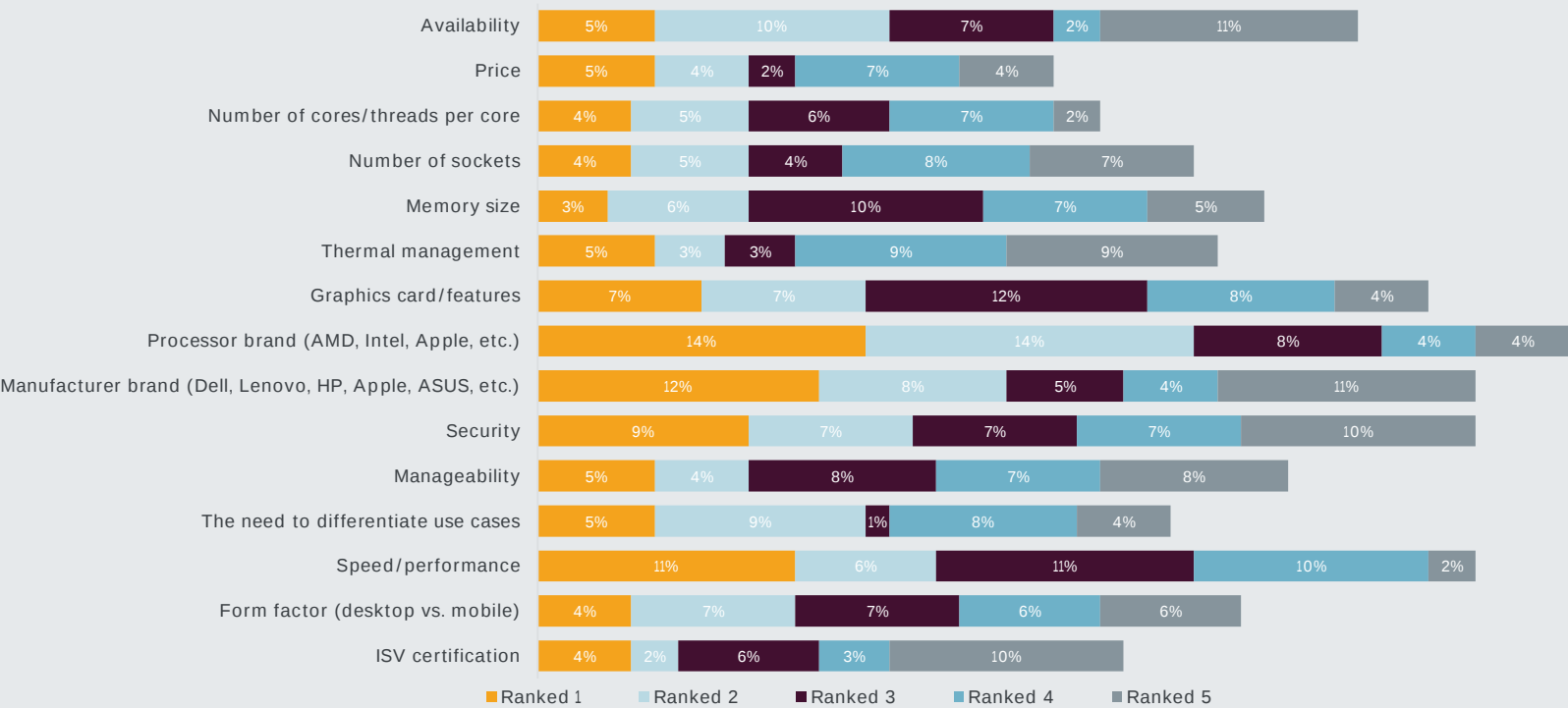
# M&E: WORKSTATION PURCHASING TIMING AND DRIVERS

Most Common Reasons for Purchasing New Workstations

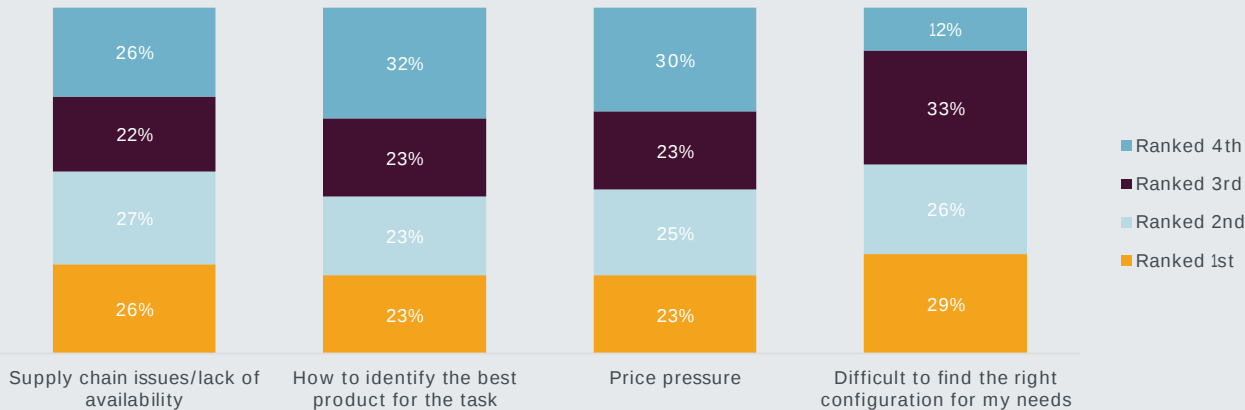


# M&E: PROCESSOR CONSIDERATIONS & CHALLENGES

Top 5 Criteria for Initial Workstation Purchase Considerations

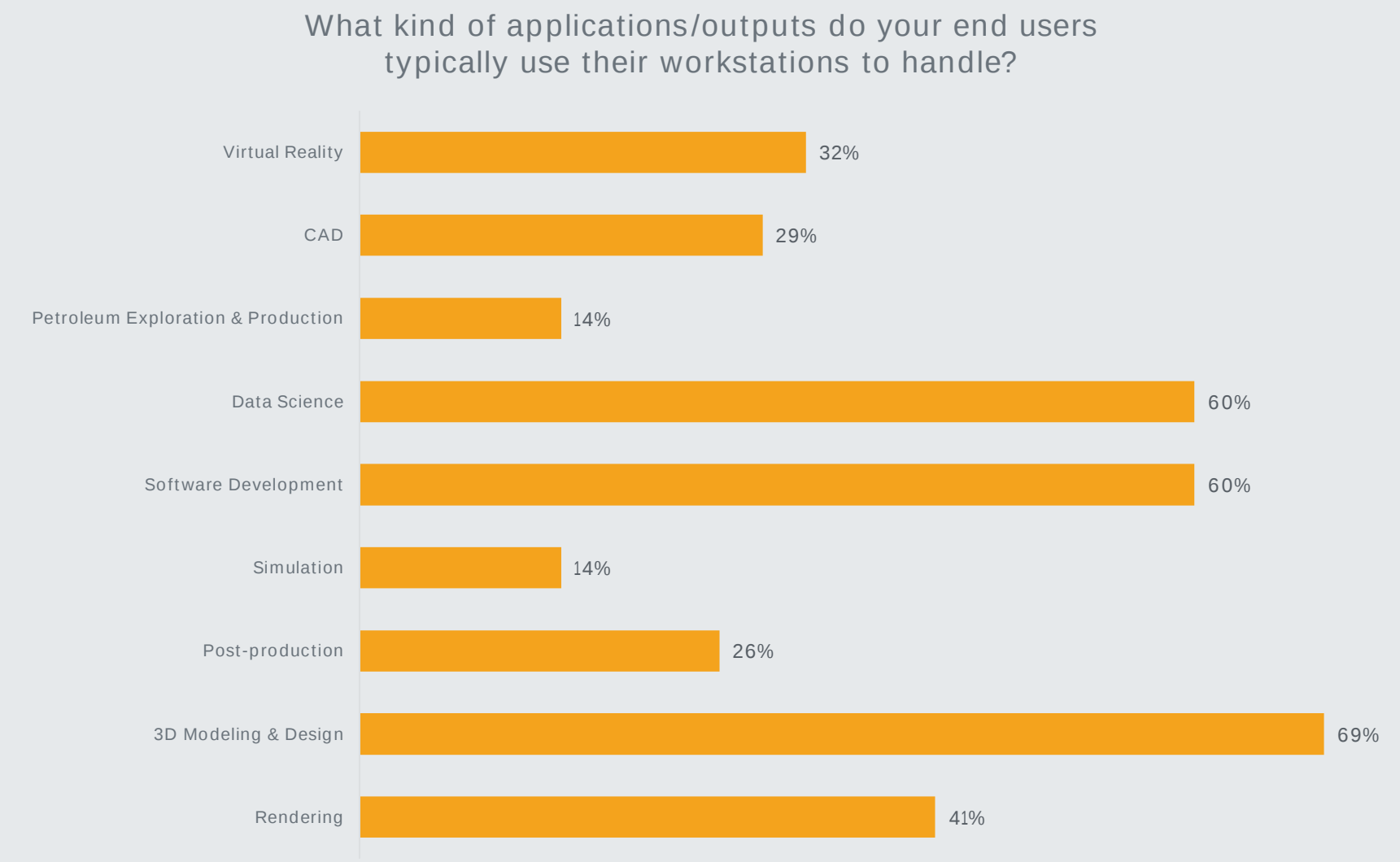


Top Challenges to Workstation Purchases



Q8: Thinking about the purchase of your workstation, what top 5 criteria did you have in mind when you started the workstation buying process.  
QS7: Question: Please rank the top challenges your organization faces when purchasing workstations in order of priority.

# M&E: APPLICATIONS/ USAGE FOR MEDIA & ENT.





WORKSTATION  
COMPETITIVE  
ANALYSIS  
(AS OF 3/22)



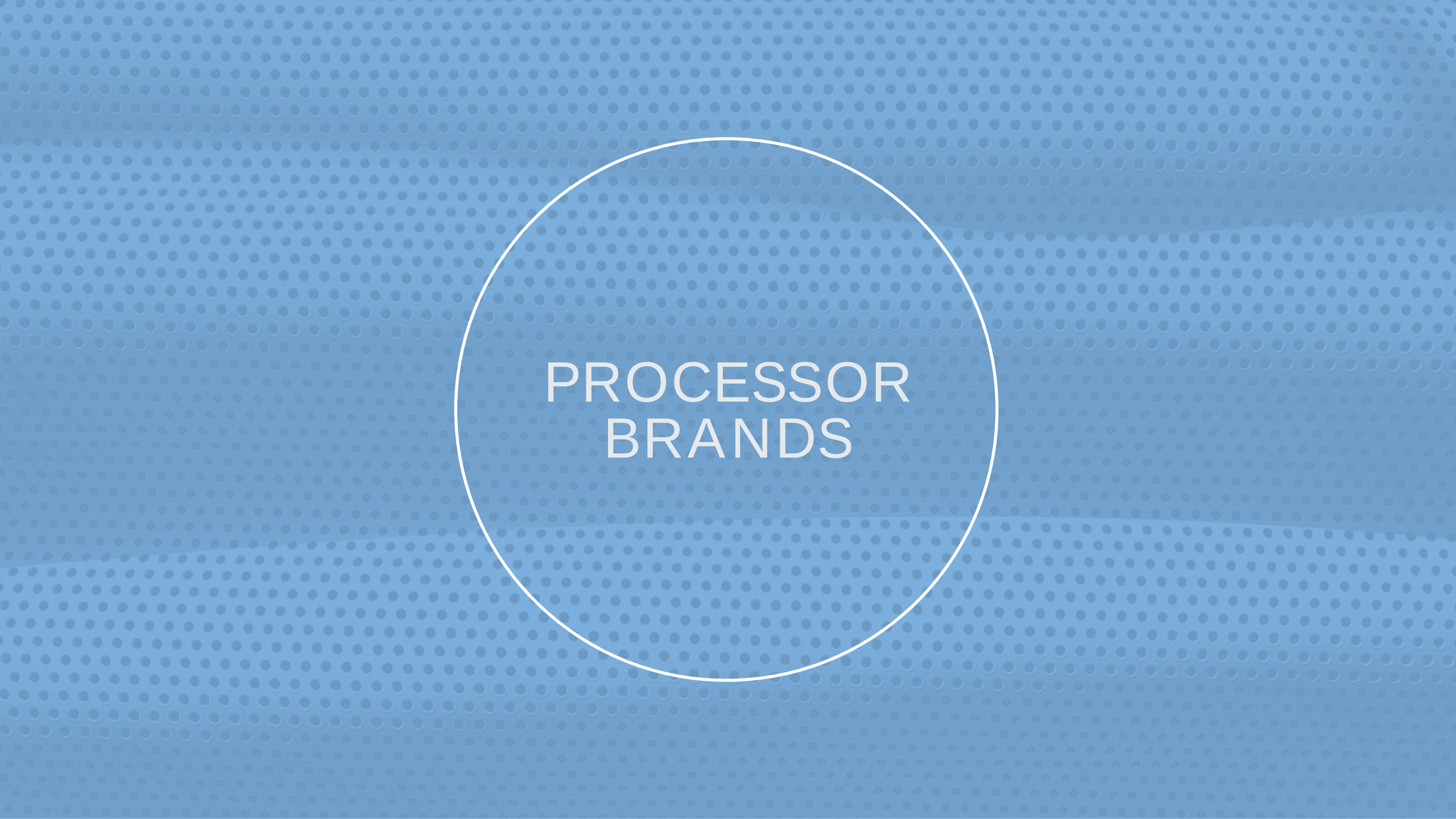
# WORKSTATION COMPETITIVE ANALYSIS

## Processor Brands

- Intel
- AMD
- Apple

## OEM Brands

- Lenovo
- HP
- Asus
- Fujitsu
- Acer
- Dell



# PROCESSOR BRANDS

# COMPETITIVE MESSAGING TAKEAWAYS - PROCESSOR

## INTEL

- Claim market leadership
- Don't devote much attention to workstation messaging on site
- Don't dedicate much messaging to individual industries
- Breadth of presence across industries is vast

## AMD

- Performance is the main message
- Industry focus with case studies on site
- Rely on sharing performance metrics to help show why customers should choose AMD

## APPLE

- Workstation messaging is around **performance and design of their machine**.
- Tout the beauty and ability of their workstation
- Do not have social posts or digital ads about workstation.

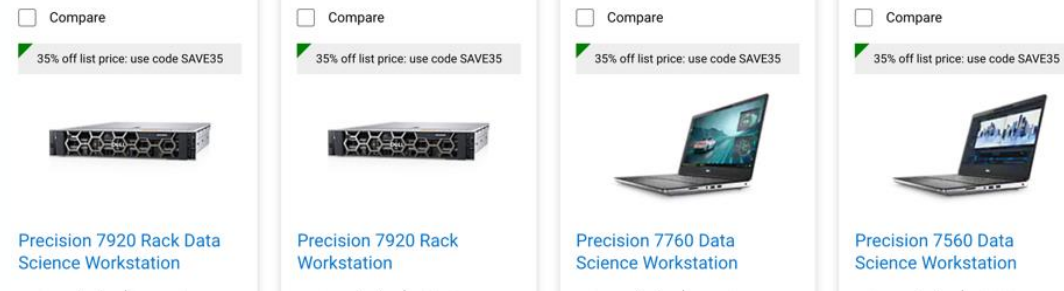
# INTEL WORKSTATION MESSAGING

- **Performance, manageability and security** messaging focus
- Webpage features **minimal messaging**
- Landing pages briefly highlight industries such as engineering, architecture and construction, and workloads such as AI, data & science, 3D rendering and CAD
- Positioned as being **leaders in the space**
- Google searches for Intel workstations immediately pull up Dell + Intel systems

## Workstations Deliver the Features Professionals Demand

### Workstations Powered by Intel

Stationary and mobile workstations powered by Intel® Xeon® processors and Intel® Core™ processors offer a powerful, reliable, manageable, and future-ready platform. Get the latest [case studies](#) and [expert tips](#) about Intel-based workstations.<sup>1</sup>



## Find the Workstation That Meets Your Needs

### Dell Precision Workstations

Shop mobile, rack and tower workstations from Dell. See the top workstation deals today.

### Lenovo Workstations

Lenovo P-series workstations offer professional power and ultimate versatility.

Sources: Intel Workstation Landing pages and Google searches for Intel workstations

Power and Performance

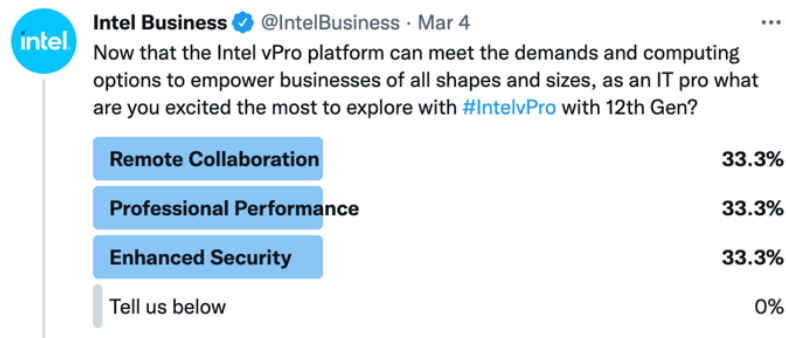
Reliability and Data Integrity

Future-Ready, Manageable, and Secure

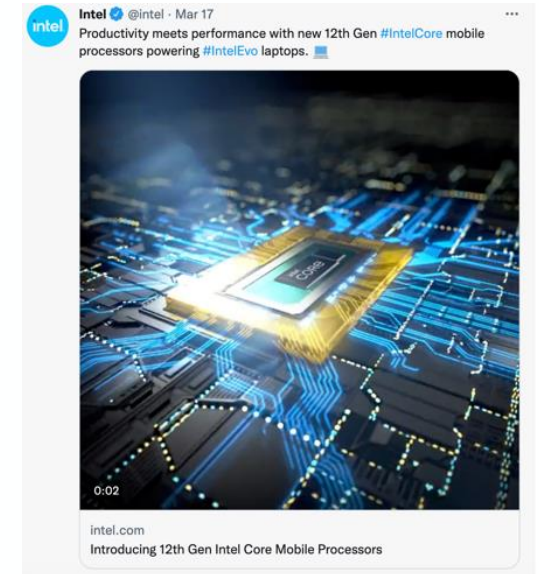
Software Optimized, Certified, and Supported

# INTEL WORKSTATION SOCIAL

- Social media **focuses on capabilities of their processors** vs. specifically mentioning workstations
- Very broad presence across many industries. Social media **does not have a singular focus and touches on many topics** while touting their strengths
- A post repeated often is a **Twitter poll** asking followers to rate business needs in order of importance – **a real-time way of understanding the needs of their customers**

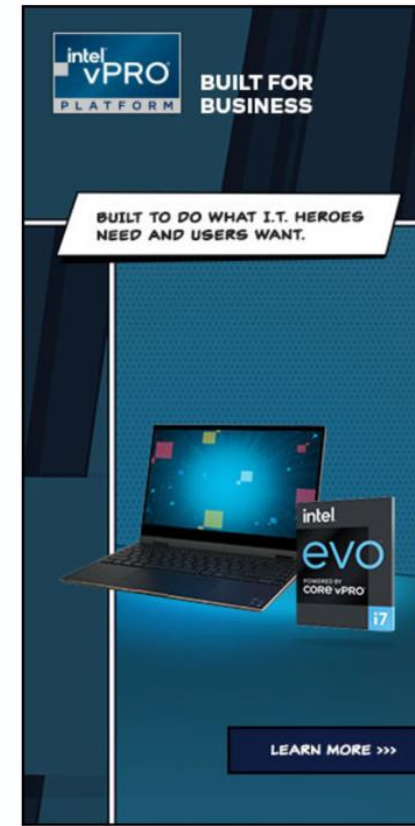
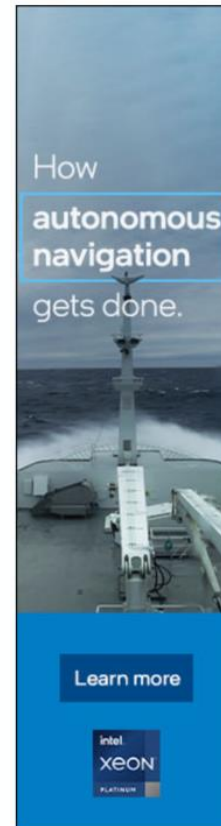
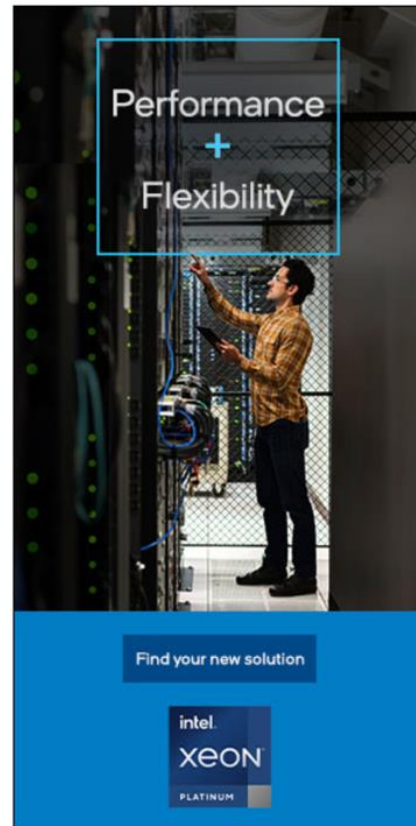


Sources: Intel Business and Intel Twitter accounts



# INTEL WORKSTATION DIGITAL ADS

- Digital ad presence is **quite varied** as they offer many products
- **No workstation-specific messaging** in digital ads
- Processor ads for business **focus on workloads such as research, data and science, and automation**
- Ads for their new product Intel vPRO have the tagline **“Built for Business”** and are focused on **IT heroes** and providing the capabilities to **make their jobs easier**



Sources: Moat.com (aggregates digital ads from a variety of websites).

# AMD WORKSTATION MESSAGING

- Focus on **performance**
- **Lists many industry focuses and provides case studies** for each industry
- **Not a lot of glossy or sleek photography**
- **Usage of performance stats and metrics** to communicate reliability and power

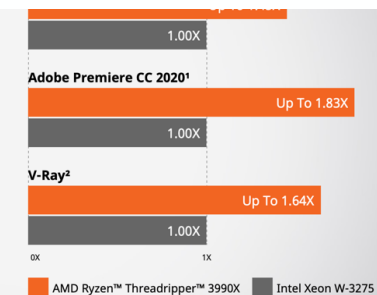
## The Ultimate Processor for Peak Performance

Imagine what you can do with the world's fastest desktop processor.

**When your business needs to get the job done, moving the deadline isn't an option.**

The video needs to be in the client's hands in 30 minutes. The scene needs to be rendered by one o'clock. The simulation results are due by end of day.

Model. Animate. Render. AMD Ryzen™ Threadripper™ Processors offer full spectrum compute capability to help you create a more visually compelling story in less time.



### AMD Ryzen™ Threadripper PRO Processors

Leverage the fastest<sup>6</sup>, most versatile workstation processor ever created, with unmatched core counts for multi-threaded workloads.

### AMD Ryzen™ Threadripper™ Processors for Creators

Processors that empower embedded designers to create amazing visual experiences on incredibly small devices.

### AMD Ryzen™ PRO Mobile Processors

With an integrated security processor to help protect confidentiality and integrity of data and long battery life, you can stay productive wherever inspiration takes you.

#### Architecture

Learn how AMD Ryzen™ Threadripper™ PRO Processors can accelerate architectural workflows like editing point clouds, rendering and virtual reality.

#### Design & Manufacturing

Discover how AMD Ryzen™ Threadripper™ PRO Processors can reduce simulation and render times while keeping engineers productive.

#### Media & Entertainment

Explore how AMD Ryzen™ Threadripper™ PRO Processors can tear through complex rendering and VFX workloads while increasing creative iterations.

#### Software & Sciences

Learn how AMD Ryzen™ Threadripper™ PRO Processors can reduce compile times and boost scientific discovery with rapid simulation and analysis.

Sources: AMD workstation processor landing page  
AMD Threadripper™ PRO landing page  
AMD Ryzen™ Threadripper™ Processors for Creators landing page

# AMD WORKSTATION MESSAGING

**The Ultimate Processor for the Professional Workstation**  
**Dream it. Design it. Build it. Imagine What You Can Do.**



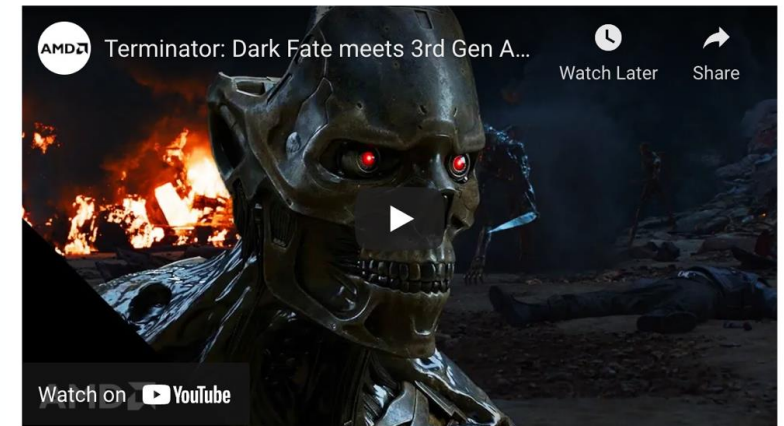
**The Ultimate Processor for the Professional Workstation**

Learn more about the Lenovo P620 workstation powered by AMD Ryzen™ Threadripper™ PRO Processors.

**Lenovo**

[LEARN MORE](#)

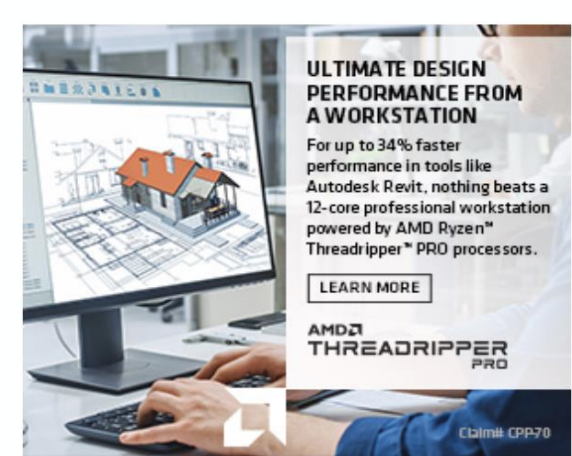
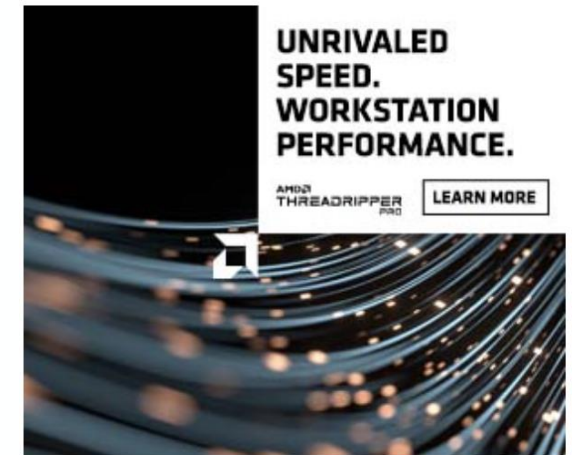
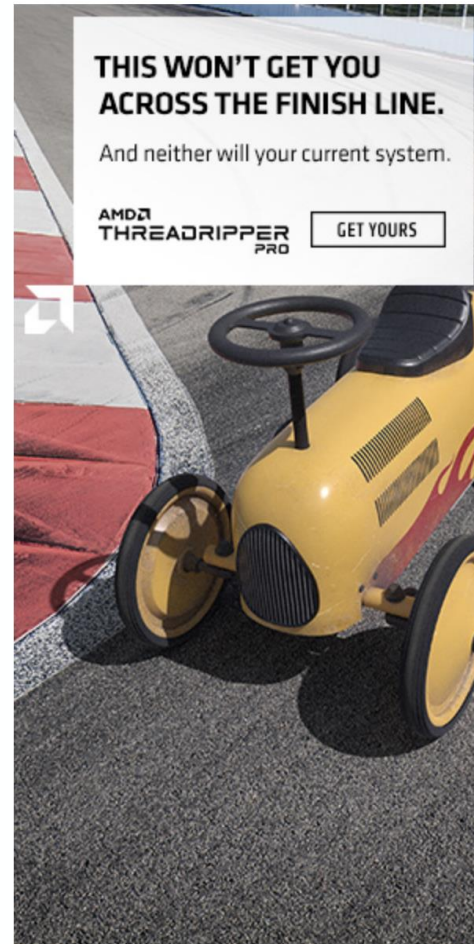
Sources: AMD workstation processor landing page  
AMD Threadripper™ PRO landing page  
AMD Ryzen™ Threadripper™ Processors for Creators landing page



See how 3rd Gen AMD Ryzen™ Threadripper™ rips through Terminator: Dark Fate frames rendered with Chaos Group V-Ray.

# AMD WORKSTATION DIGITAL ADS

- Focus on **performance**
- **Touch on a variety of industries**, as many of the AMD workstation landing pages do as well
- Use of **performance metrics**
- **Highlight processor specs**



Source: Moat.com (aggregates digital ads from a variety of websites).

# AMD WORKSTATION SOCIAL

- Ryzen's social focuses more on gaming units
- Workstation posts are mixed in with gaming-focused posts**
- Processor posts highlight industries such as **media and entertainment**, which are easiest to share on social being the **most visually appealing**
- Social posts mention speeds, feeds and specs**, similar to workstation landing page messaging
- AMD Creators web series posts** – demonstrating a shared focus among competitors around **visually creative workflows** in messaging



**AMD Ryzen** @AMDRyzen · Mar 4

Designing visual effects that come straight out of movies means creators need powerful systems to get the work done. 🙌

"The AMD Threadripper PRO reduces my render times by 300%," says 3D visual artist Aundraj Jude.

Watch AMD Creators In Action:

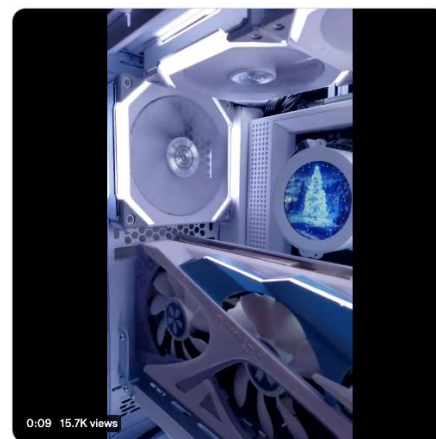


youtube.com  
AMD Creators-In-Action Episode 1: Aundraj  
Create without limits. Watch Aundraj transform  
Singapore into a playground for his creations with ...



**AMD Ryzen** @AMDRyzen · Jan 22  
This is one clean looking all-AMD build powered by a Ryzen 5 5600G and  
@Radeon RX 6700 XT! 🔥

u/garvin1337 from Reddit



**AMD Ryzen** @AMDRyzen · 6h

AMD is excited to announce the new Ryzen Threadripper PRO 5000 WX-Series processors!

Five new CPUs bring workstation users exceptional performance and powerful enterprise tools to handle today's most demanding workloads.  
[amd.com/en/processors/...](https://amd.com/en/processors/)



**AMD Ryzen** @AMDRyzen · Jan 4

Introducing the first Ryzen desktop processor with 3D V-Cache technology and fastest gaming CPU in the world. ⚡

AMD Ryzen 7 5800X3D features 8 cores, 16 threads, and a large 64MB of 3D V-Cache to go with 32MB of 2D cache. Watch to learn more.  
[#AMD2022](https://amd.com/2022)



amd.com  
AMD 2022 Product Premiere: AMD Ryzen 7 5800X3D



**AMD Radeon PRO** @RadeonPRO · Feb 17

Boosting productivity and enabling multitasking. Learn how SyntheStruct harnessed the power of real-time graphics engines to accelerate media and entertainment workflows.



amd.com  
SyntheStruct + AMD Case Study

Sources: AMD Ryzen and AMD Radeon Twitter accounts.

# APPLE WORKSTATION MESSAGING

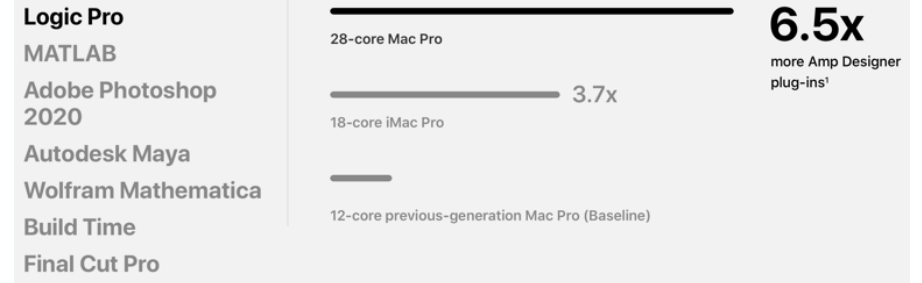
- Performance messaging and design focus
- Consistent simplicity in branding for workstations featuring sleek designs
- Focus on storytelling featuring capabilities
- Don't explicitly call out industries though do mention the creative needs of designers and architects

**Power to change everything.** Say hello to a Mac that is extreme in every way. With the greatest performance, expansion, and configurability yet, it is a system created to let a wide range of professionals push the limits of what is possible.

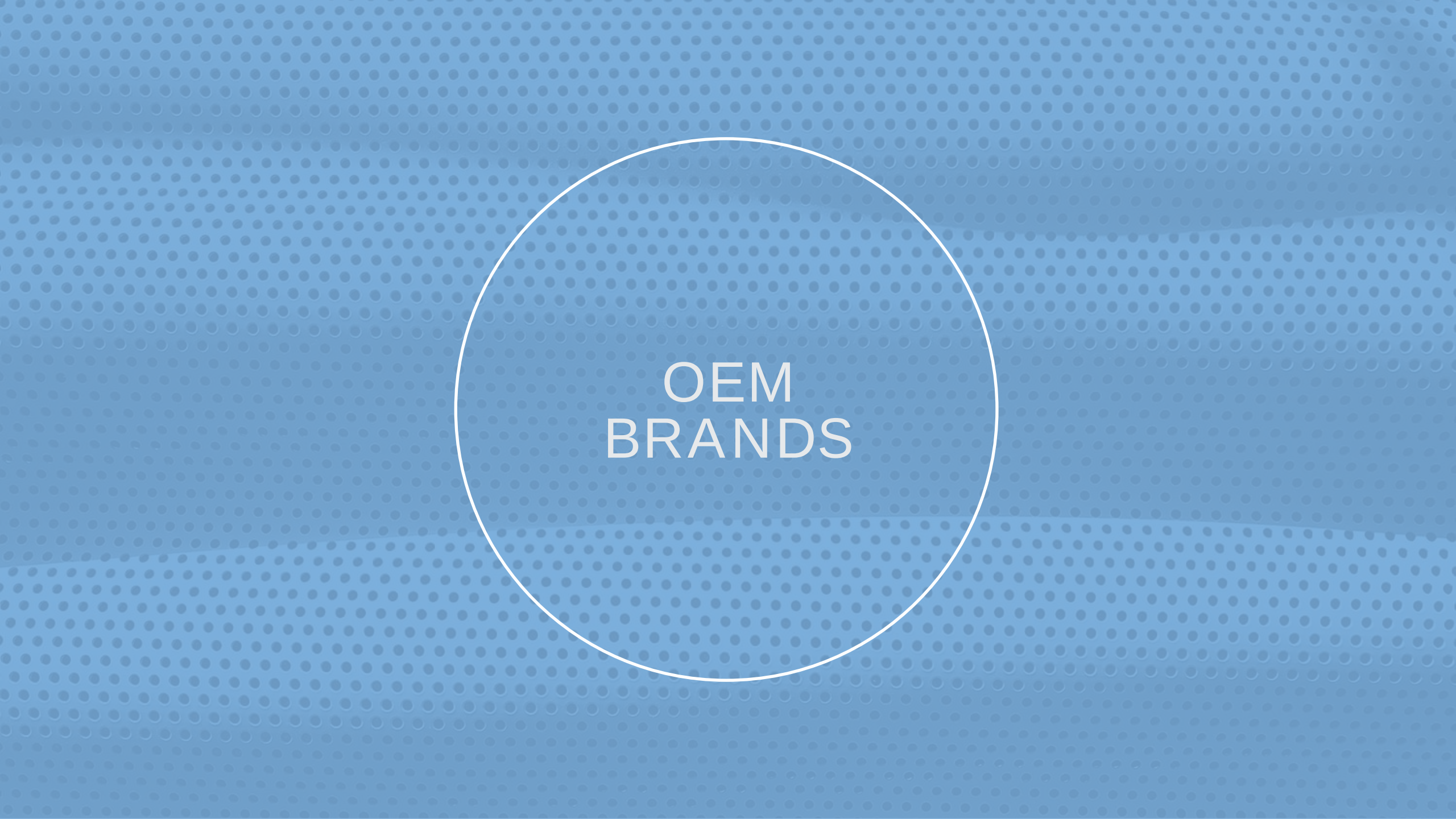
[View the Mac Pro Technology White Paper \(PDF\)](#)



Source: Mac Pro landing page



**Up to 28 cores of power. Create without constraint.** Mac Pro is designed for pros who need the ultimate in CPU performance. From production rendering to playing hundreds of virtual instruments to simulating an iOS app on multiple devices at once, it's exceedingly capable. At the heart of the system is an Intel Xeon processor with up to 28 cores — the most ever in a Mac. In addition, large L2 and shared L3 caches and 64 PCI Express lanes provide massive bandwidth in and out of the processor.



OEM  
BRANDS

# COMPETITIVE MESSAGING TAKEAWAYS - OEMS

## LENOVO

- Focuses on **quality, cost savings, and capabilities** messaging
- Highlights flashy case studies
- One of the few OEMs that **highlight AMD processors** in workstation messaging

## FUJITSU

- Focuses on **creative workloads**  
Less visual compared to HP and Acer. More **transactional**
- Mentions **performance, reliability, expandability and enterprise-grade security** as four key value propositions
- **Do not feature performance metrics** like AMD

## HP

- All about the **visual and creative workloads**
- Messaging is glossy, colorful and visually engaging
- **Does not feature AMD** in their high-level messaging

## ASUS

- Highlights **performance and power** in site messaging
- Social messaging focuses more on **creative/visual storytelling** similar to HP, Acer and Apple

## ACER

- Messaging is about **unleashing creativity**
- Focuses on **graphic workloads** in their workstation messaging

## DELL

- Position themselves as a **market leader with more transactional messaging**
- Frequently play up their **partnership with Intel**

# LENOVO WORKSTATION MESSAGING

- Messaging focuses on **quality and capabilities**
- **Reliable machines to help you create**
- **Lean in on creative case studies** to help tell story and show capabilities
- Unlike most competitors, **Lenovo features AMD in their high-level messaging** and a webpage dedicated to AMD Threadripper with Lenovo workstation benefits
- Lenovo/AMD workstation messaging leads with **performance, capabilities and configuration**



## Legendary quality = huge cost savings

A 2019 Technology Business Research, Inc. (TBR) PC Reliability Study: Workstation Overview found that Lenovo workstations have the lowest repair rate among top competitors.

Aston Martin relies on Lenovo workstations to create legendary cars.

## Whistle & work while you render

Every ThinkStation and ThinkPad P Series workstation is tested and certified by independent software vendors (ISVs). ISV certification ensures software and hardware compatibility, stability, and reliability, so you can enjoy optimal performance. Don't just take our word—see what our customers have to say.

Hollywood-based Gnomon School of Visual Effects, Games, & Animation relies heavily on Lenovo ThinkStations for their technology, reliability, and scalability.

Source: Lenovo Think P Series Workstation Family landing page

# LENOVO WORKSTATION MESSAGING

## High-Performance PCs Powered by AMD

Whether you're a business multi-tasker, a competitive gamer, a digital artist, or just a PC enthusiast who demands the best, there's a lot to love in AMD processors.

[Shop Now](#)



## Lenovo Workstations with AMD Ryzen Threadripper PRO Processors

AMD Ryzen™ Threadripper™ PRO processors are built to deliver the ultimate workstation computing experience. With up to 64 cores and 128 threads of processing power, they're a big step above other high-end workstation CPUs, making Ryzen Threadripper PRO an excellent choice for engineers, researchers, content creators and others who demand the best.

## Limitless possibilities. Game-changing power.

It's here. The ThinkStation P620: the world's first AMD Ryzen™ Threadripper™ PRO workstation. This powerhouse boasts up to 64 cores and 4.0GHz. What's more, it's the first workstation to offer PCIe Gen 4 for increased storage speed and expandable memory, as well as unmatched NVIDIA® Quadro® RTX graphics support, and 10GB of built-in ethernet—a new standard in connectivity.

## Power that can't be beat

AMD Ryzen™ Threadripper™ PRO gives the ThinkStation P620 up to 64 cores and 128 threads—all from a single CPU. Simply put, other workstations would need at least two CPUs to accomplish what the P620 can do with one.

## Highly configurable

The ThinkStation P620 workstation tower is equipped with abundant storage and memory capacity, numerous expansion slots, enterprise-class AMD Ryzen PRO manageability, and security features. With unprecedented NVIDIA® Quadro® graphics support, this eminently configurable workstation is equipped with two NVIDIA® Quadro RTX™ 8000 graphics cards with NVLINK or up to four NVIDIA® Quadro RTX™ 4000 GPUs.

Source: Lenovo AMD workstation landing page

# LENOVO WORKSTATION SOCIAL

- Social posts **do not have a singular focus** and feature messaging **featuring many topics** that will be of interest to users
- Topics include **empowering remote workers**, computers that can keep up with **intensive workloads**
- **Highlight industry trends** like automation and interesting case studies



Source: Lenovo Workstations Twitter account

# HP WORKSTATION MESSAGING

- Use of **sleek product photography**
- Emphasis on **design and creative workloads**
- Focus on **high performance and reliability** for users



Source: HP Workstation landing page

## Z Desktops

Desktop workstation PCs for technical and creative professionals who demand high performance for the world's heaviest workloads.

Z Workstation desktops are built for the most specialized and power-intensive workflows, so you can cut through your toughest jobs. Full tilt, no trade-offs.

• Sustainability

Better for People,  
Better for the Planet

• Security

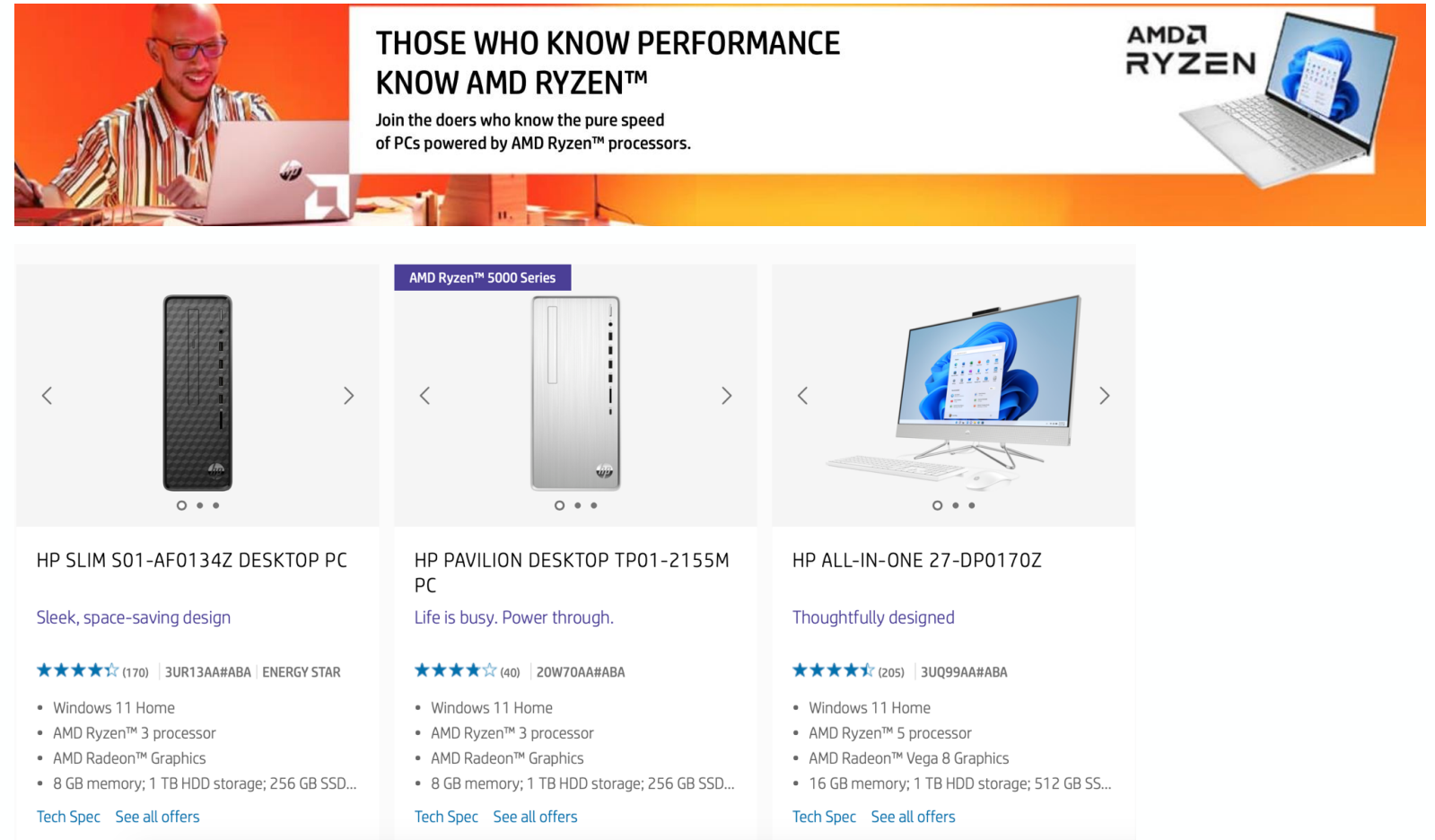
Peace of Mind

• Reliability

Rely on Your  
Workstation

# HP WORKSTATION MESSAGING

- Do not feature AMD in their high-level workstation messaging
- This page with only three product results was found after some digging and was **not easily available to navigate to AMD** on their site



THOSE WHO KNOW PERFORMANCE  
KNOW AMD RYZEN™

Join the doers who know the pure speed of PCs powered by AMD Ryzen™ processors.

AMD RYZEN

AMD Ryzen™ 5000 Series

HP SLIM S01-AF0134Z DESKTOP PC

Sleek, space-saving design

★★★★☆ (170) | 3UR13AA#ABA | ENERGY STAR

- Windows 11 Home
- AMD Ryzen™ 3 processor
- AMD Radeon™ Graphics
- 8 GB memory; 1 TB HDD storage; 256 GB SSD...

[Tech Spec](#) [See all offers](#)

HP PAVILION DESKTOP TP01-2155M PC

Life is busy. Power through.

★★★★☆ (40) | 20W70AA#ABA

- Windows 11 Home
- AMD Ryzen™ 3 processor
- AMD Radeon™ Graphics
- 8 GB memory; 1 TB HDD storage; 256 GB SSD...

[Tech Spec](#) [See all offers](#)

HP ALL-IN-ONE 27-DP0170Z

Thoughtfully designed

★★★★☆ (205) | 3UQ99AA#ABA

- Windows 11 Home
- AMD Ryzen™ 5 processor
- AMD Radeon™ Vega 8 Graphics
- 16 GB memory; 1 TB HDD storage; 512 GB SSD...

[Tech Spec](#) [See all offers](#)

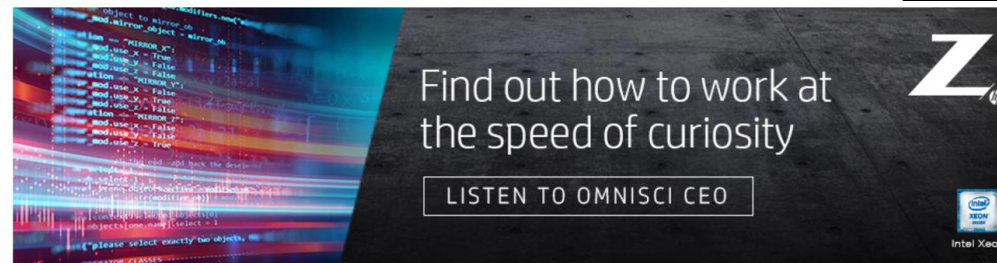
Source: HP US Desktop AMD Ryzen landing page

# HP WORKSTATION DIGITAL ADS

- Big focus on creative workflows like graphic design and entertainment and media industry
- Sleek product photography
- Digital ads highlight other workflows such as AI and data-science and all is communicated with engaging visuals



IDENTICAL COLOURS ON EVERY SCREEN.  
EVERY TIME.



Source: Moat.com (aggregates digital ads from a variety of websites).

# HP WORKSTATION SOCIAL

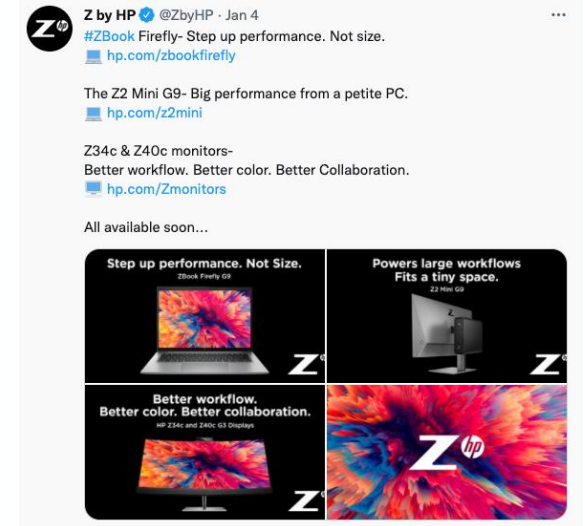
- **Very visually engaging.**
- They **tout performance wins** by sharing awards from well-known sources like CES. Imagery is bright and colorful and engaging
- They have a good **mix of images and video**
- They are **highly focused on creative workflows** more than other workflows and on **bringing storytelling to life**
- **Messaging is similar to Apple**

**Z by HP** ✓  
@ZbyHP

High-performance laptops, desktops and solutions designed for creative and technical pros. [#PowerYourBreakthrough](#)



Source: Z by HP Twitter account



# ASUS WORKSTATION MESSAGING

- Messaging on webpages is very **focused on performance and power**
- Similar to AMD, they **feature stats to demonstrate** industry-leading **performance capabilities**
- Feature use cases for several workloads and **position themselves for the enterprise** in most messaging

## EMPOWERING INTELLIGENT SOLUTIONS

Leverage our innovations with new technologies to deploy intelligence and connectivity from core to cloud.

### Performance

ASUS E900 G4 is ASUS's first workstation powered by up to four NVIDIA® or AMD® GPUs and up to dual Intel® Xeon® CPUs, delivering extreme, scalable performance for a wide variety of scenarios – from machine-learning to real-time rendering. It's built to last, certified by multiple independent software vendor and is primed to smash every performance expectation.

## 1,105+ WORLD RECORDS

ASUS servers continue to dominate the industry-leading Standard Performance Evaluation Corporation (SPEC) benchmarks, topping the tables in a wide variety of performance tests.

## Workstation Systems

ASUS server-grade workstations are optimized for enterprise and content-creation professionals requiring powerful compute and graphics performance.



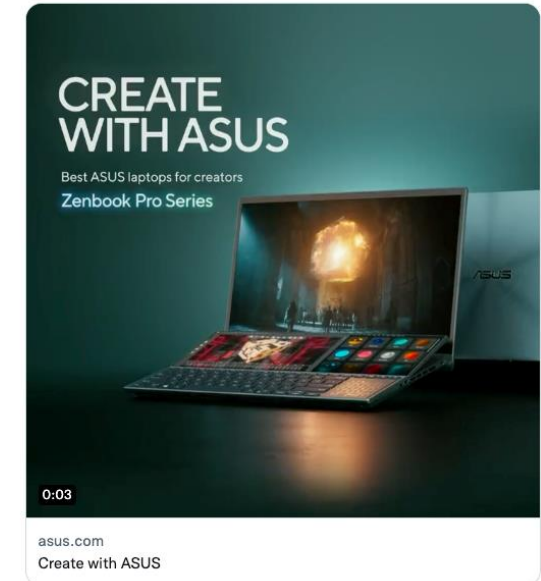
Source: Asus All Series Workstations landing page.

# ASUS WORKSTATION SOCIAL

- **Social messaging is different** from workstation landing page messaging
- **#wowtheworld** campaign demonstrates **visual storytelling capabilities** with ASUS workstations
- Focus on **creative workflows**
- **Similar to Apple messaging** around creativity and storytelling



Source: ASUS North America Twitter account.



# FUJITSU WORKSTATION MESSAGING

- **Telling a story around creativity** like many of the OEM competitors
- **Less glossy imagery** compared to HP or Acer
- Lead with **4 key value propositions** on their webpage and focus on three industry workloads
- Page is **not as transactional as Dell or AMD**

## FUJITSU Workstation CELSIUS

### Powerful tools to speed up your design and creative workflows

CELSIUS workstations from Fujitsu support creativity, simulation, calculation and visualization at the highest professional level.

With end-to-end capabilities from design and engineering to production, CELSIUS workstations have gained a great reputation for offering ingenious thermal management and cooling as well as reaching world-leading benchmarks. All mobile, desktop and rack workstations are optimized for use with a host of leading applications such as Autodesk, Dassault Systèmes, Siemens PLM or PTC.

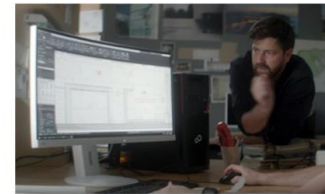
### FUJITSU CELSIUS Workstation stories



Media & Entertainment (animation)



Gigapixel Panorama Stitching



UYO Architects

## FUJITSU Workstation CELSIUS



Source: Fujitsu Workstation Celsius landing page.

Outstanding Performance  
Maximum Reliability  
Unrivalled Expandability  
Enterprise-Grade Security

# FUJITSU WORKSTATION SOCIAL

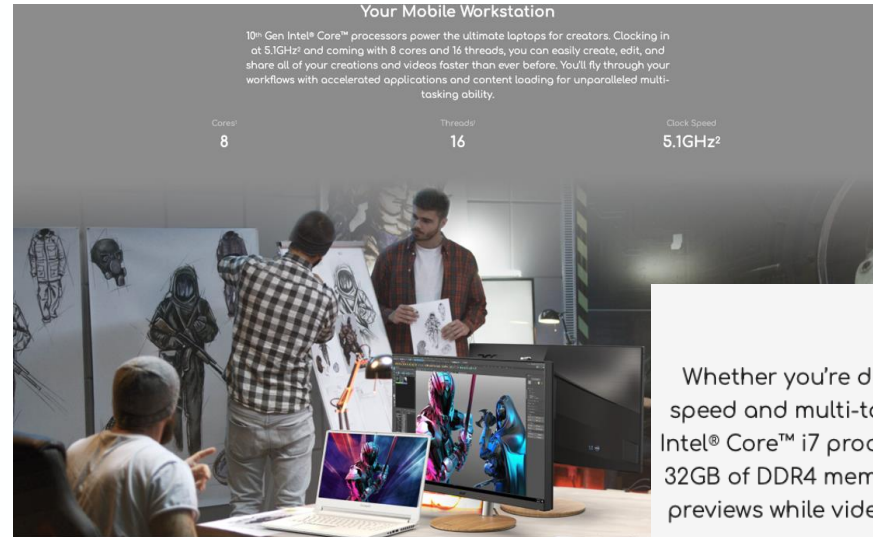
- Social does not push products.
- Social messaging **focused on solving the problems faced by businesses**
- Social features mentions of various business problems and **drives audiences to register for webinars, or to read research and infographics**



Source: Fujitsu Americas Twitter account.

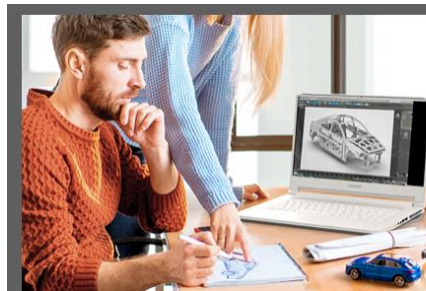
# ACER WORKSTATION MESSAGING

- Like Lenovo and HP, Acer is also **heavily focused** on the message of **being creative**
- Webpage features photography of users **working on creative problems** on their workstation machines
- **Highlight industry focuses**, though not as many as AMD
- Page is **not as transactional as Dell or AMD in messaging**



## Unleash Your Creativity

Whether you're designing in 2D or 3D, you'll fully appreciate the ConceptD 7 Pro's speed and multi-tasking prowess. The elegantly designed chassis houses a 10<sup>th</sup> Gen Intel® Core™ i7 processor¹, an NVIDIA® Quadro RTX™ 5000 MaxQ¹ graphics card, up to 32GB of DDR4 memory, and up to 2TB PCIe NVMe SSDs in Raid 0. Get faster real-time previews while video editing, or smoothly export and render up to 6K video files and 3D designs.



Product Designers



Architects



Video Game Developers

Source: Acer mobile workstation landing page

# DELL WORKSTATION MESSAGING

- Focus on **long history of excellence**
- **Leader** in the market
- Webpages **do not feature glossy product photography** compared to HP and Acer
- Focus on products and Dell's **long history of providing professional-grade workstations**
- **Messaging is more transactional** than competitors

## Precision Workstations

For 25 years, Dell Precision workstations have delivered innovative technologies for creators to bring ideas to life.

Precision workstations are the #1 workstation brand in the world, offering Dell's highest performing, most reliable and fully customizable mobile workstations for professional applications.



Source: Dell workstation landing page

Accelerate product development.

Go to market using Dell Precision workstations with Intel® Xeon® processors and Intel® Core™ processors.

# DELL WORKSTATION MESSAGING

- No high-level messaging for AMD or AMD Threadripper on Dell's workstation landing pages
- When searching specifically for AMD/Dell workstations, the products that appear feature only Intel processors

35% off list price: use code SAVE35



## Precision 3450 Small Form Factor Workstation

Estimated Value ~~\$2,018.42~~

**\$1,409.00**

You Save **\$609.42 (30%)**

☒ Get it as soon as **Tuesday, Mar 1**

[View Delivery Dates for 73301](#)

 10th Generation Intel® Core™ i7-10700

 Windows 10 Pro (Dell Technologies recommends Windows 11 Pro for business)

 AMD® Radeon™ Pro WX 2100, 2 GB GDDR5, low profile, DP, 2 mDP to DP adapters

### Processor

- ☐ Intel Xeon (22)
- ☐ Intel Core i9 (2)
- ☐ Intel Core i7 (34)
- ☐ Intel Core i5 (26)
- ☐ Intel Core i3 (2)

### Memory (RAM)

- ☐ 32 GB or More (27)
- ☐ 16 GB (36)
- ☐ 8 GB (21)
- ☐ 4 GB or Less (2)

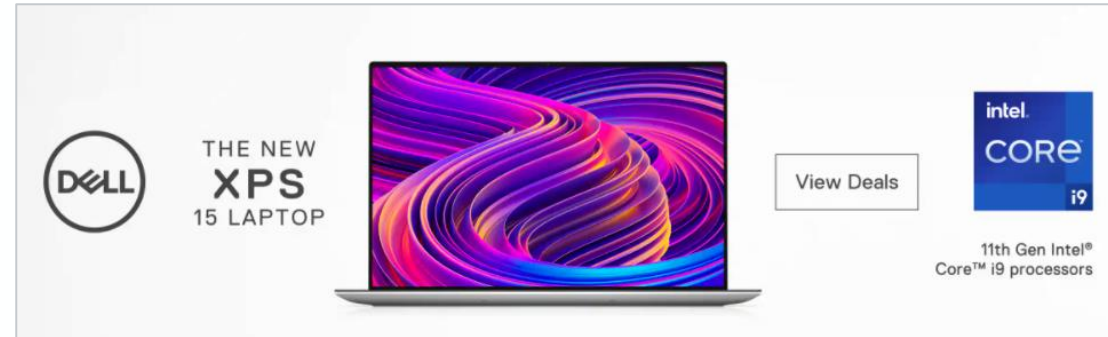
### Processor Generation

- ☐ 11th Gen Intel Core (46)
- ☐ 10th Gen Intel Core (13)
- ☐ 9th Gen Intel Core (3)

Sources: Dell workstation product pages

# DELL WORKSTATION DIGITAL ADS

- Workstation digital ads are **very transactional**
- **Do not mention capabilities, specs,** highlight workloads or industries
- **Minimal product photography**
- Highlights **Intel partnership**

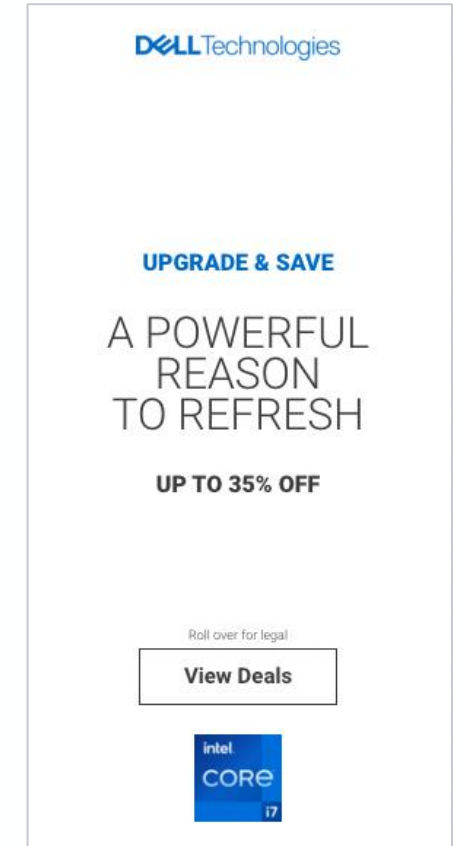


Ad · <https://www.dell.com/workstations/business> · (877) 289-3355

**Dell Business Workstations - Free Shipping + Price Match**

Affordable & Powerful. Shop Dell Business **Workstations** w/ Intel Core Today! Reliability...

[Dell Workstation Deals](#) · [Dell Monitor Deals](#) · [Dell Desktop Deals](#) · [Fast Shipping Deals](#)



Source: Moat.com (aggregates digital ads from a variety of websites) and Google search ads.