

Eccolo Media 2010 B2B Technology Collateral Survey Report

September 2010

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INTRODUCTION

For three years now, Eccolo Media has conducted its annual survey of U.S. business technology purchasers to better understand how they perceive, use, and consume the most well-known types of marketing communications collateral in the sales cycle.

With this historical perspective comes the opportunity to identify some ongoing trends—and to cautiously predict the future. This year's survey leads Eccolo to believe that traditional written collateral is evolving into two related but distinctly unique species, and that the ability to embed multimedia elements into written documents will revolutionize the way marketing communications are planned, distributed, consumed, and used.

Above all, Eccolo Media's third annual B2B Technology Collateral Survey Report reinforces a critical reality to which all marketers must pay heed: the quality, format, length, and topic of marketing collateral substantially affects the purchase decision, as does the channels through which these assets are made available. Those who don't evolve their communications to satisfy end-user preferences are leaving potential advantage on the table.

EXECUTIVE SUMMARY

Welcome to the third annual *Eccolo Media B2B Technology Collateral Survey Report*. Conducting a survey of this detail, analyzing the data, and writing this report takes up a significant chunk of our time (and patience) every summer. Why do we do it?

Our initial desire was to validate some hypotheses around what makes good content and put some proof points behind our best practices. Predictably, we've had as many best practices debunked as we've had proven, but the end result has always been nothing less than thrilling. Few are looking as closely as Eccolo is at the art and science of writing marketing collateral, and the opportunity to share our findings with our clients and colleagues makes the collateral survey report one of our favorite projects of the year.

Five hundred U.S.-based respondents responsible for making technology purchases were included in the 2010 survey. We queried respondents on their use of five basic collateral types: white papers, case studies, brochures & data sheets, audio or podcast content, and video collateral. Respondents were subsequently segmented into "influencers" and "decision makers"; they were further segmented by company size.

Continuing Trends

Respondents of every type continue to consume a wide variety of collateral when considering a technology purchase, but once again, brochures & data sheets are the most frequently consumed collateral type. They are followed very closely by white papers, and less closely by case studies, video collateral, and audio files. White papers were once again the winner, however, when it came to the perceived influence of collateral over the tech purchase. They not only rank very high individually; for the third year in a row white papers are ranked as the most influential when compared to the other collateral types overall. While brochures & data sheets are frequently consumed, they impart less influence on the purchase decision. White papers are also the most frequently shared type of content, firmly cementing their place in the upper echelons of the marketer's toolkit. Our advice: invest in white papers.

Video use increased 82 percent from 2008 to 2009. The trend continues, if a bit less dramatically, in 2010, with video chalking up a 16 percent increase in use. We've anecdotally seen video more widely adopted as a collateral tool in the past 12 months, and we predict that use will continue to grow, both in terms of consumption and in the ways in which it can be creatively applied for marketing communications.

A vast majority of respondents continue to consume all collateral types at the desktop, and once again our advice is to optimize assets for digital consumption. That means avoiding graphic elements and layouts that are difficult to view in a digital format, but also taking advantage of this trend by embedding links to other

files in the written collateral. We predict that file compression technologies will advance to the point where the level of interactivity in written collateral will be limited only by imagination. And that leads us to what we believe to be the real jewel in this year's survey.

Interactive Collateral Increases Influence

This is the first year that Eccolo surveyed on the consumption of written content containing embedded audio and/or video media. While a bit less than half our respondents indicated that they had read written collateral that contained embedded audio or video files, 93 percent clicked through to those media files, and 80 percent indicated that the inclusion of the files positively or very positively increased the influence of the written collateral.

Clearly the ability to embed multimedia files in written content is making meaningful changes in marketing communications. We predict that improving compression technologies will lessen the big bump in overall file size that the addition of multimedia files creates, making insertion of audio and video into written collateral types easier and more attractive. Beyond the faddish appeal, this type of interactive collateral allows marketers to insert a level of passion and personality into written content that is hard to ignore. Written marketing communications that don't include multimedia will begin to appear flat and old-fashioned by comparison.

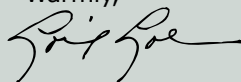
Content Strategy Is a C-Suite Opportunity

Virtually all marketing and communications strategies require content for tactical deployment. From lead generation to lead nurture, to social media strategies, to product launches and brand campaigns, collateral and content assets are the tools required to spur interaction with the target end user.

The majority of the 2010 survey respondents tell us that they consume the lion's share of their marketing content in the pre-sales phase of the sales cycle—before they ever speak with a representative within a specific company. Put in this context, content becomes the entry point, or the sales rep, of every business. Evangelizing proactive content strategy from the C-suite down will not only result in more cost-effective and targeted communications, it will support a more nimble and relevant organization overall—one that is uniformly committed to more leads, warmer leads, and content assets that are more easily tuned for market advantage.

We look forward to your comment and feedback on the *Eccolo Media 2010 B2B Technology Collateral Survey Report*.

Warmly,



Lorie Loe

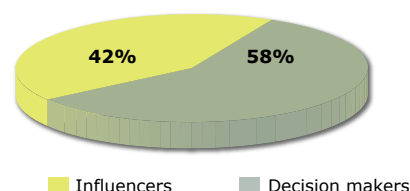
President and Chief Content Strategist

ABOUT THE SURVEY

For the second year in a row, Eccolo Media collaborated with Global Marketing Insite (GMI), a leading global market research firm, to identify and manage participants for an in-depth survey on the use of B2B technology collateral during technology purchases. GMI distributed the online survey in June 2010 and provided the results as raw data to Eccolo Media for analysis.

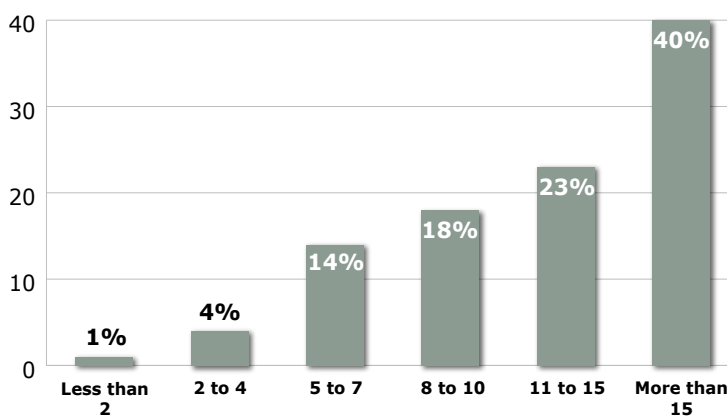
Respondent titles included C-level executives, vice presidents (VPs), managers, directors, developers/programmers, and technicians. All worked for U.S.-based companies. All were responsible for either making B2B technology purchases or influencing purchasing decisions. Only respondents who indicated that they had participated in a technology purchase in the last six months were included in the survey results.

Figure 1. Are you primarily an influencer or decision maker?



Of the 500 respondents included in the results, 58 percent identified themselves as technology purchase decision makers; the remaining 42 percent identified themselves as purchase influencers. (Figure 1) Forty-five percent of respondents were under 40 years old; 55 percent were over. Respondents trended slightly toward having more experience in the technology industry this year as compared to 2009; a full 40 percent had in excess of 15 years experience; 63 percent had upwards of 11 years of experience; and 81 percent had more than eight years experience. (Figure 2)

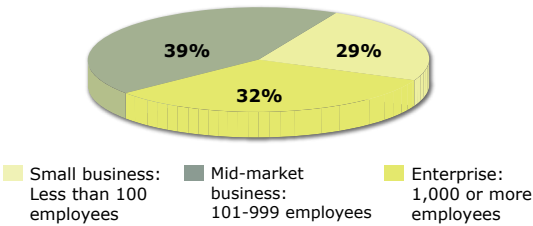
Figure 2: Respondents' years in the technology industry



Thirty-two percent of respondents worked for enterprises (1,000 employees or more); 39 percent for middle-market businesses (101-999 employees); and 29 percent for small businesses (less than 100 employees); as shown in Figure 3.

When respondents were asked if they make purchasing decisions primarily from a business perspective, a technology perspective, or both, the majority of respondents, 61 percent, indicated they consider both technical and business criteria when making a technology purchase. Thirty-four percent used only technology criteria, and only five percent of respondents considered purchases from a business perspective only.

Figure 3. Size of company



Respondent Profiles

As in our 2009 report, we used profiling questions to help us create two distinct respondent types: the “decision maker” and the “influencer.” Those respondents who identified themselves as decision makers tend to take a more holistic view of technology purchases, considering them from both the business and technology perspectives. Alternatively, those respondents that identified as influencers are more likely to consider technology requirements alone. Decision makers also tend to be higher up the organizational ladder: C-level executives, vice presidents (VPs), and directors. Influencers, on the other hand, are more likely to identify themselves as managers, developers, and programmers. (Figure 4)

Figure 4. Respective characteristics of decision makers and influencers

Profile #1: Decision Makers (58%)	Profile #2: Influencers (42%)
Approach purchasing decisions from both business and technology perspectives	Approach purchasing decisions from a primarily technological perspective
C-level executives, VPs, or directors	Managers, developers/technicians, and programmers

Where our analyses identified statistically significant differences, we also present data segmenting these two primary profiles by organizational size.

Collateral Types and Definitions

The survey asked respondents questions about their use of five collateral types:

- **White papers.** These provide analyses of technology or business trends from an independent, vendor-neutral position.
- **Case studies/success stories.** This type of collateral features stories of how customers successfully deployed a company’s products or services.
- **Podcasts.** These are digital audio recordings that can either be streamed from a Web site or downloaded onto a desktop or

mobile device. Topics vary, but can include product overviews, discussions by or interviews with subject matter experts, or customer testimonials.

- **Video.** This increasingly important form of collateral is being used for a broad range of marketing communications, from customer success stories, to product demonstrations, to analyst or internal expert interviews.
- **Product brochures/data sheets.** These documents contain specific product/service or company information.

Respondents from larger companies are much more likely to consume content

We found a marked difference in content consumption across all collateral types when looking at the size of the organization. Both decision makers and influencers from both middle-market and enterprise companies were more likely to consume collateral than those from small companies.

In previous years, survey questions were designed to determine respondent preferences for each collateral type. What collateral did they find to be most influential? Through what channel did they receive the collateral, and did this affect the perceived influence of the collateral? When in the purchasing cycle did they tend to view specific collateral types?

These questions, and more, were then analyzed for useful data points.

Presentation of Data and Discussion

For our 2010 Survey Report, we chose to organize our key findings into the following sections:

- The perceived influence of each type of collateral on the purchasing decision
- What our respondents think makes “good” (i.e. influential) content and collateral
- The emerging practice of embedding audio and video files within written collateral, and the perceived influence of this practice
- The manner in which respondents received collateral (i.e. the channel)
- How collateral is used in the sales cycle

As in previous years, we used the results of our analysis to create a series of best practices that marketers can apply to optimize their content development processes and maximize the impact of their collateral assets. You’ll find this in the last section of our report.

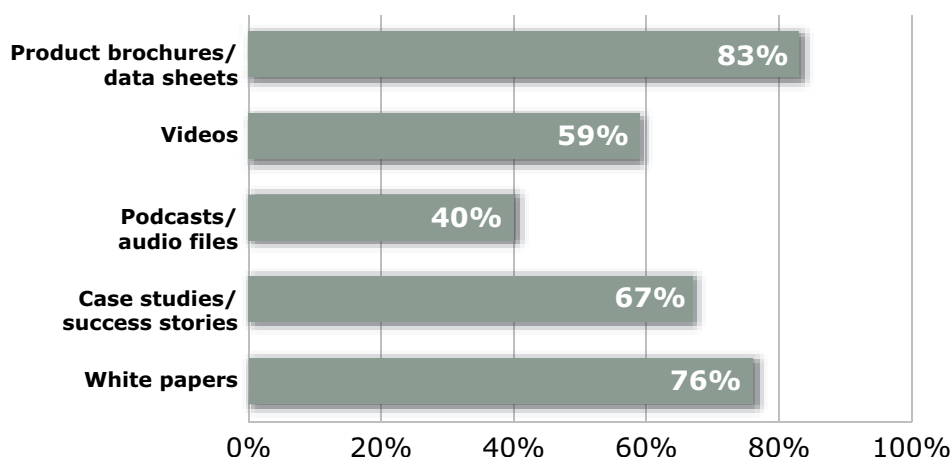
KEY FINDINGS

The Sphere of Influence

Over the past three years we have probed to discover what types of collateral respondents consume, and the degree to which each collateral type influences their purchasing decisions.

As in previous years, we found that both decision makers and influencers consume a wide range of collateral types when making technology purchases: from product brochures, to videos, to podcasts, case studies, and white papers. (Figure 5)

Figure 5. Which of the following collateral types have you consumed in the last six months to evaluate a technology purchase?



As we found in every past survey, the most frequently consumed types of collateral are product brochures & data sheets. In fact, respondents have only increased their use of this type of content over the years: from 70 percent in 2008; to 78 percent in 2009; to this year's finding of 83 percent. Case studies and white papers, after making significant leaps in consumption rates between 2008 and 2009, remained relatively flat between 2009 and 2010. The biggest changes were in the frequency in which respondents consumed videos and podcasts & audio files. In 2008, only 28 percent of respondents had consumed these types of collateral. In 2009, podcasts made a moderate gain up to 32 percent. Video consumption increased more generously from 28 percent in 2008 to 51 percent in 2009.

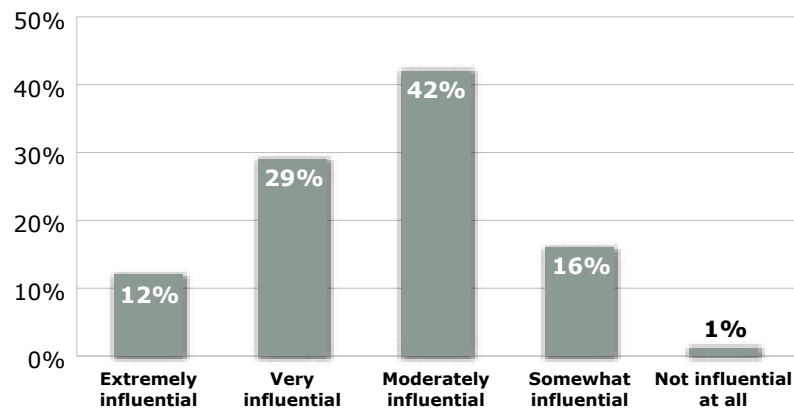
This year that trend continued. Consumption of audio content increased 8 percentage points to 40 percent. Video collateral consumption increased 8 points to 59 percent—the same consumption levels that case studies were at in 2008.

White Papers Remain Most Influential

Although the number of respondents who had read a white paper in the past six months to evaluate a purchasing decision remained flat over the past 12 months (77 percent in 2009 and 76 percent in 2010), the vast majority of respondents

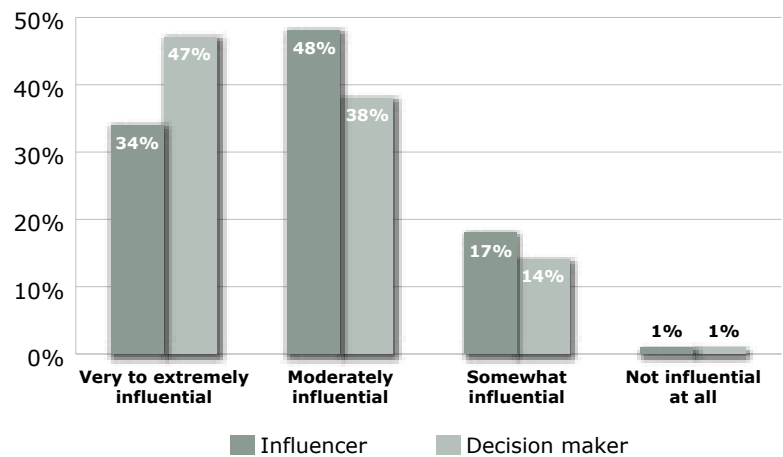
(83 percent) felt that white papers were moderately to extremely influential in helping them make their final purchase decisions. Only one percent thought that white papers weren't influential at all, and 41 percent thought they were very to extremely influential. (Figure 6)

Figure 6. How influential are white papers in your purchasing decisions in 2010?



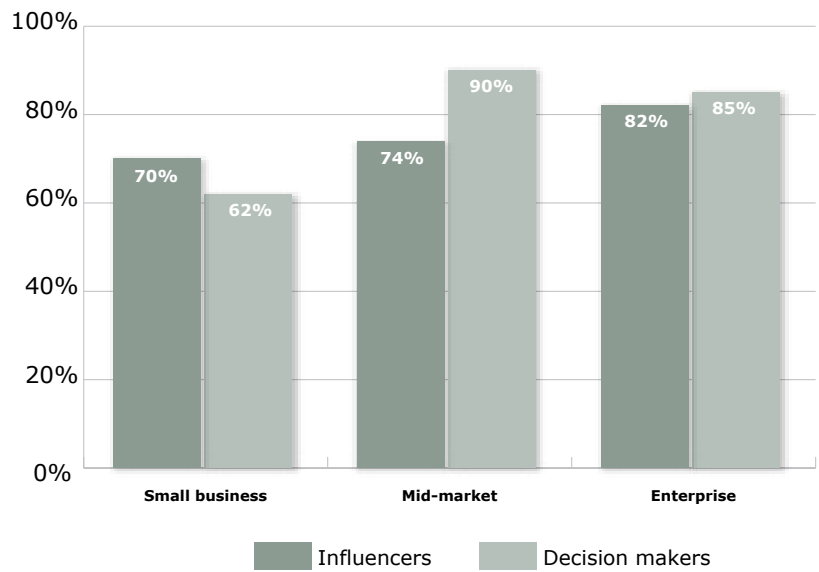
In 2009 we identified a significant gap (22 percent) between decision makers and influencers in how influential they found white papers—with 51 percent of decision makers finding white papers “very to extremely influential” compared to just 29 percent of influencers who agreed with that statement. That gap narrowed in 2010, and we now see a 13 percent difference between the two groups. (Figure 7)

Figure 7. How influential are white papers in your purchasing decision? (influencers versus decision makers)



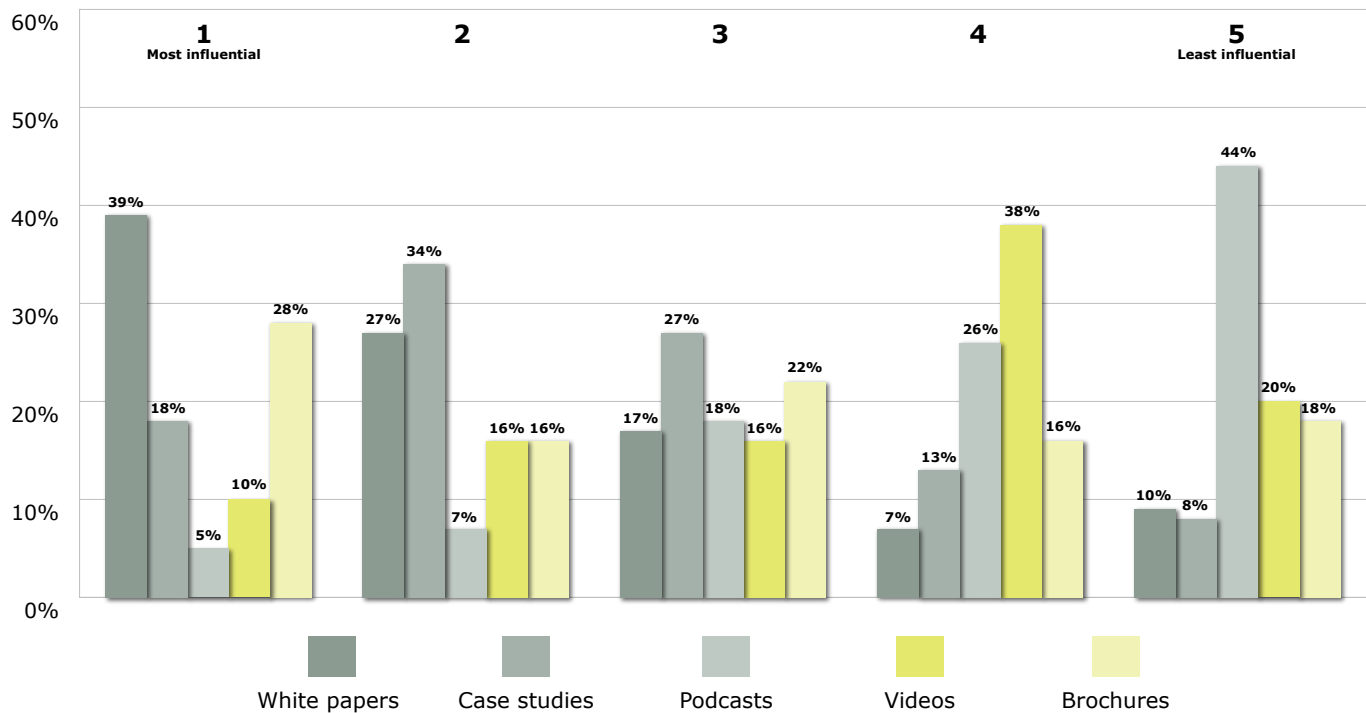
Organizational size also seems to make a considerable difference in how respondents view white papers. Both decision makers and influencers from enterprise and mid-market companies are more likely to consume a white paper than their small business counterparts, as seen in Figure 8.

Figure 8. Have you read any white papers in the past six months to evaluate a technology purchase?



Finally, we asked respondents to rank all collateral types from most influential to least influential (Figure 9 on page 9). As in our previous surveys, white papers were most frequently given as the most influential collateral type. Statistically, there was no difference between decision makers and influencers in this regard. These findings continue to reinforce our position that the high usage rate of white papers, coupled with their high perceived influence, make them a very valuable asset in the marketing communications toolkit.

Figure 9. Please rank the following collateral in order of influence in making purchasing decisions, with 1 being most influential and 5 being least influential.

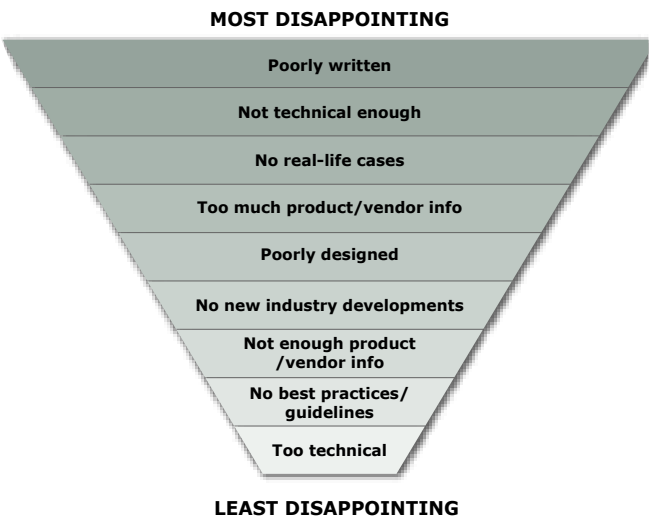


When White Papers Disappoint

While other types of collateral, such as case studies and brochures, are fairly standard from company to company, white papers can vary widely in terms of their format, content, and organization. To better understand what makes for a “good” white paper—what increases influence—we asked the 2010 respondents the reverse question: what would most disappoint them when reading a white paper? What would decrease its influence?¹

Poorly written content was most frequently ranked as the number one reason for respondents expressing disappointment in a white paper, as seen in Figure 10. However, other results surprised us. For example, contrary to what Eccolo has long believed, white papers that don’t possess best practice recommendations do not disappoint, implying that key take-aways or next steps are not particularly persuasive. Neither do white papers that are too technical. Instead, white papers that don’t contain *enough* technical information are more likely to disappoint than those that possess too much.

Figure 10. When reading white papers, what is most likely to disappoint you?

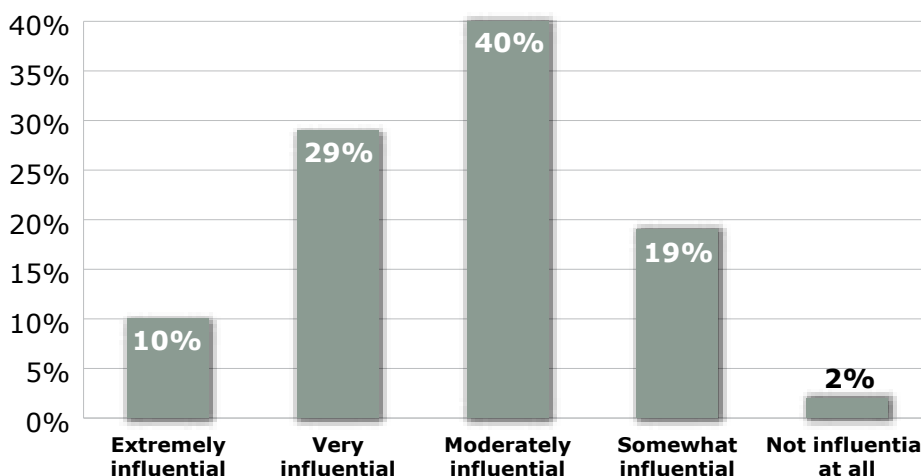


Case Studies Remain Valuable Collateral

The frequency with which case studies were used to make technology purchases in 2010 remained statistically unchanged from 2009 (67 percent). When asked how influential they felt case studies were in making purchasing decisions (Figure 11), the answers were again statistically similar to 2009: 79 percent of respondents in the 2010 survey felt that case studies were moderately to extremely influential. Nineteen percent found them somewhat influential, and only two percent found them not to be influential at all. As in 2009, when compared to the influence of other collateral types, 2010 respondents ranked them as the second-most influential after white papers. (see Figure 9 on page 9)

¹ In previous surveys we attempted to answer this question by plainly asking respondents what increased the influence of white papers. The resulting data sets, however, were flat, with no real critical element for positive influence standing out. Hence our decision to pose the question from the negative.

Figure 11. How influential are case studies in your purchasing decisions?



As in 2009, we asked respondents if case study content would be more or less influential if offered in a different format—for example, if delivered in non-written forms such as audio or video.

There was virtually no change in the response to this query between 2009 and 2010. Written case studies were still most frequently tapped as the most influential of all case study formats. (Figure 12)

When we compared the attitudes of decision makers and influencers toward case study format, however, we did find a statistically significant change in the 2010 survey results. In the 2009 survey, influencers were much more likely to find written case studies the most influential (76 percent) than decision makers (59 percent). In 2010, the difference in attitudes was just a single percentage point: 65 percent of influencers found written case studies to be the most influential form of customer testimonial compared to 64 percent of decision makers who indicated the same thing. The gap also closed in respondents' attitudes toward video testimonials. In 2009, 40 percent of decision makers specified video as the most influential format for customer testimonials compared to 23 percent of influencers. In 2010, this gap narrowed to just three percentage points (35 percent and 33 percent, respectively). (Figure 13)

Figure 12. In which format would you find a customer testimonial to be most influential?

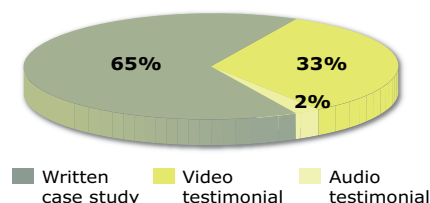
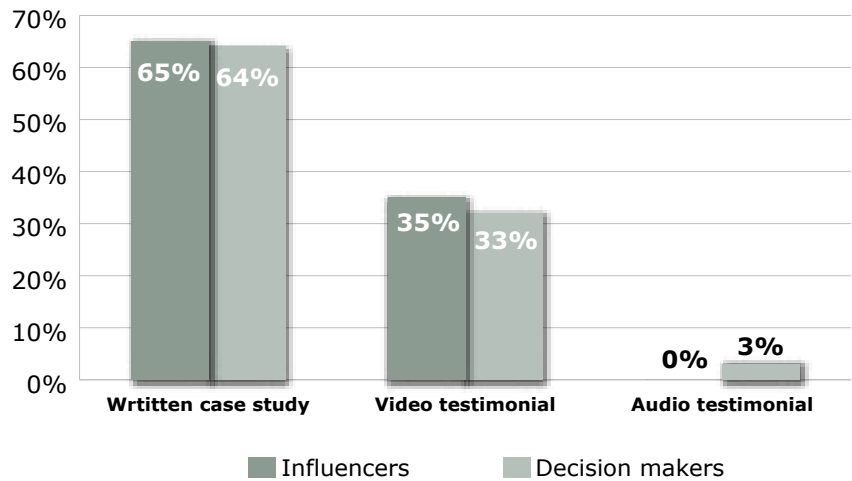


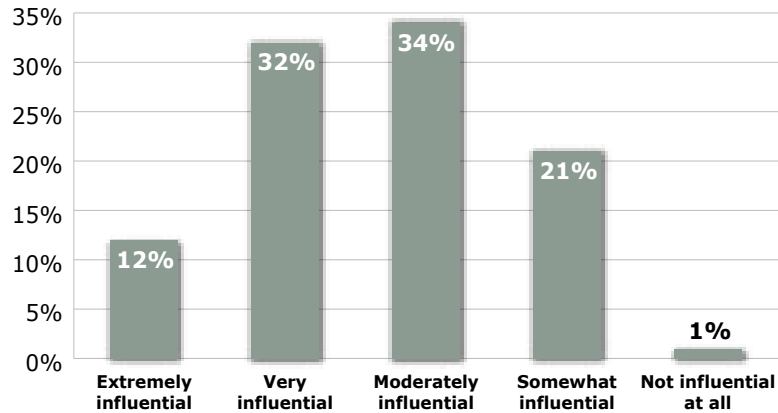
Figure 13. In which format would you find a customer testimonial to be most influential? (decision maker versus influencer)



Podcasts: More Frequently Consumed, But Less Influential

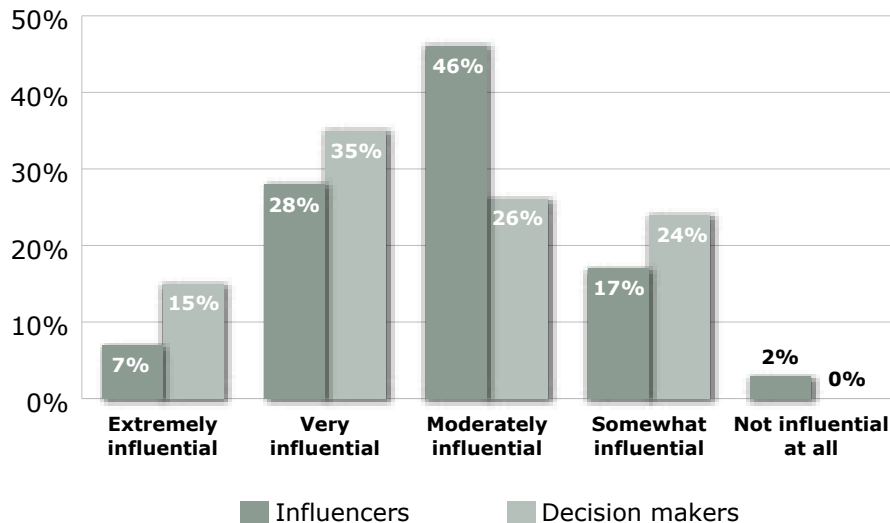
Podcasts continued to play a role in the technology purchasing cycle in 2010. The percentage of survey respondents who listened to a podcast in the past six months rose to 36 percent, up from 32 percent in 2009 (Figure 5). However, the percentage of respondents who found them to be moderately to extremely influential dropped to 78 percent (see Figure 14) compared to 82 percent in 2009. As in 2009, podcasts are ranked the fifth-most influential type of collateral when compared to other surveyed collateral types (see Figure 9 on page 9).

Figure 14. How influential were podcasts/audio files in making a final purchasing decision?



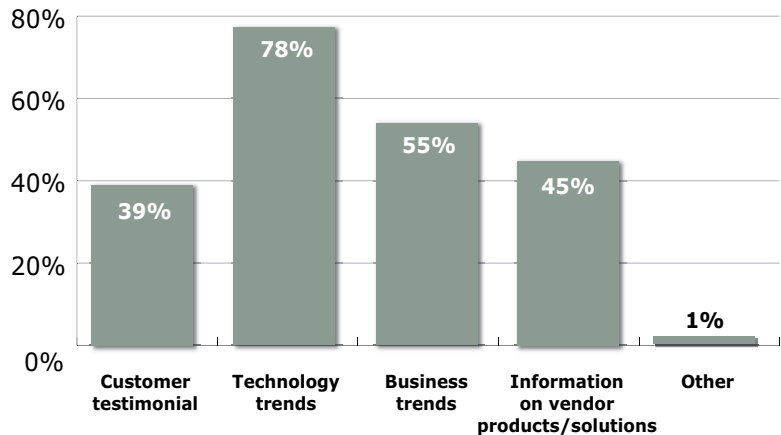
One interesting change identified in this year's results: in 2009 decision makers found podcasts more influential than influencers did—with 87 percent finding them moderately to extremely influential compared to just 73 percent of influencers. In 2010 these results flipped, with 81 percent of influencers finding podcasts moderately to extremely influential, compared to 76 percent of decision makers. (Figure 15) Decision makers were still more likely to find podcasts very or extremely influential, however.

Figure 15. How influential were podcasts/audio files in making a final purchasing decision?



In those cases when respondents indicated they had listened to a podcast, we asked what type of podcast it had been. By far the most common type of podcast consumed was one covering technology trends (78 percent), followed by business trends (55 percent). Forty-five percent listened to information on vendor products and/or solutions, with the smallest, but still significant, percentage (39 percent) listening to customer testimonials in that format. (Figure 16)

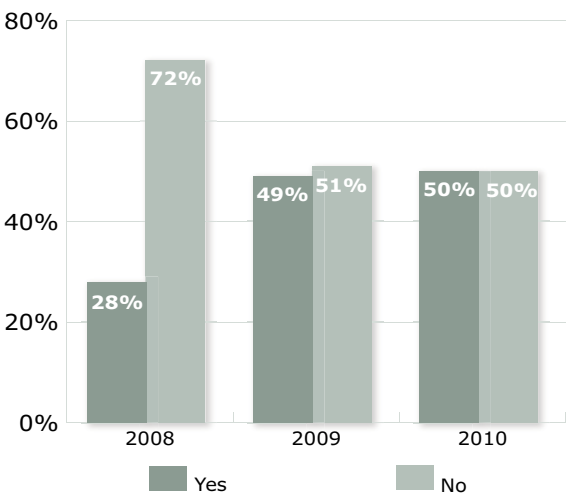
Figure 16. What types of podcast/audio files have you listened to in order to evaluate a technology purchase? Check all that apply.



Video: Continued Growth in Consumption

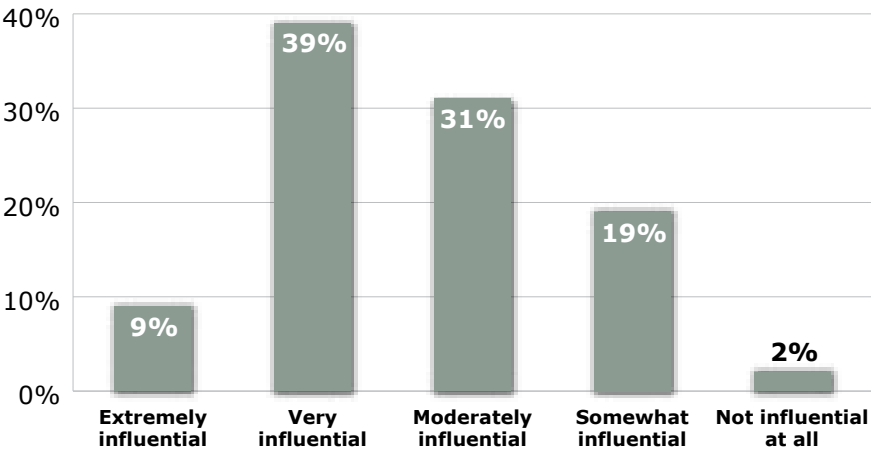
Our 2010 survey respondents indicated that their use of video when considering technology purchase continues to increase. The percentage of respondents who watched a video in the past six months increased eight points to 59 percent. This result continues a trend seen in the 2009 survey results, when use of video increased from 28 percent in 2008 to 49 percent in 2009. (Figure 17)

Figure 17. Have you viewed any videos in the past six months to evaluate a technology purchase?



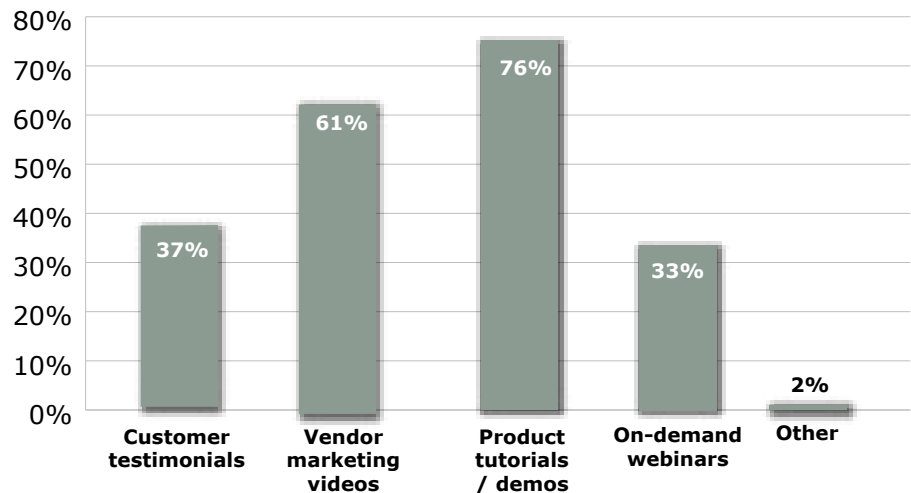
In 2008, video was ranked fifth in influence when compared to other types of collateral. In 2009, it moved into fourth place, surpassing podcasts in influence. In 2010 it held on to that position. (Figure 9 on page 9) When asked how influential the video was on a technology purchase, 26 percent of respondents indicated they found videos to be moderately to extremely influential. (Figure 18)

Figure 18. How influential were the videos in making a final purchasing decision?



We further inquired as to the type of video respondents consumed during a technology purchase. Respondents watched more product tutorials/demos by a wide margin over other types of video collateral (76 percent). Vendor marketing videos were the next most commonly viewed type of video (61 percent), followed by customer testimonials (37 percent), and on-demand webinars (33 percent), as seen in Figure 19.

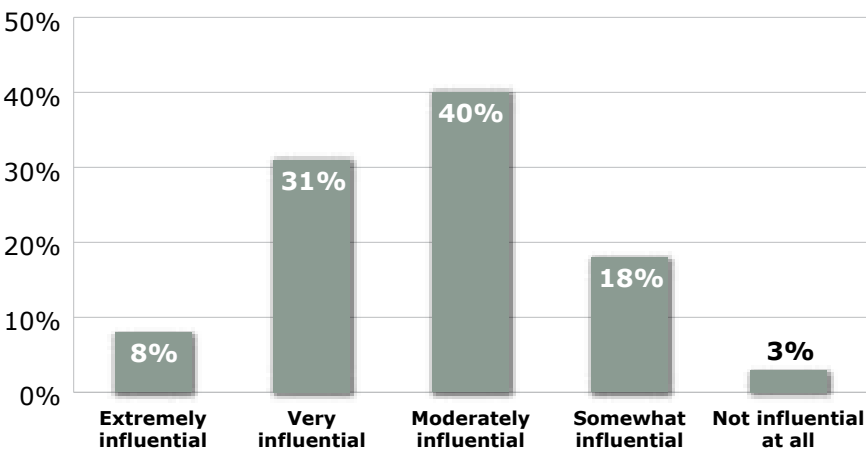
Figure 19. What types of video files have you listened to in order to evaluate a technology purchase?



Brochures and Data Sheets Consumed Most Frequently

In 2009, brochures and data sheets were the most frequently consumed of all collateral—with 78 percent of respondents using them to make a purchasing decision over the past six months. In 2010, 83 percent of respondents consumed these types of collateral. But although 79 percent of respondents rated them as moderately to extremely influential when making a technology purchase (Figure 20), they still tend to rank behind white papers and case studies when compared with other collateral types (see Figure 9 on page 9).

Figure 20. How influential were brochures/data sheets in making a final purchasing decision?



As with many other types of collateral, large enterprises were more likely to consume brochures than small companies (less than 100 employees), with mid-sized companies falling in between.

This year, we continue to recommend that brochures and data sheets be a part of every marketer’s collateral toolbox, precisely because they are so frequently

consumed. We also reiterate our advice that it might not be strategically wise to rely solely on this type of collateral given that their perceived influence is lower than some other collateral types. Rather, brochures and data sheets should be “must-have” assets in a well-rounded collateral portfolio that includes a broad variety of other content types.

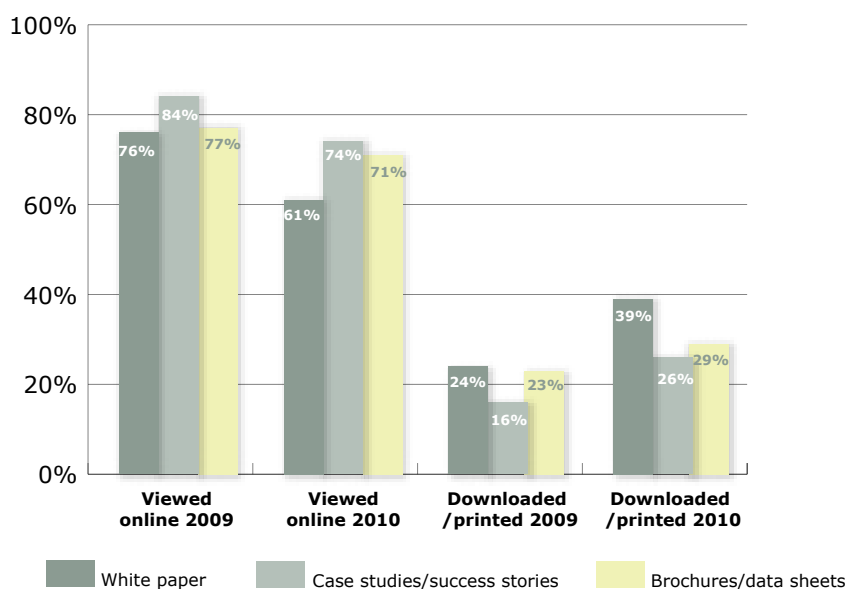
How Technology Purchasers Consume Content

As in previous years, we devoted significant time to analyzing how technology purchasers consume and use collateral. In this section, we share our results, plus our insight into what respondents believe makes “good” collateral.

Most Collateral Still Consumed Digitally

One surprise in this year’s survey results was that, although respondents still have an overwhelming preference for consuming written content on the desktop rather than printing it out, that number actually declined across all types of written collateral. (Figure 21) For example, in 2009, a full three-fourths (76 percent) of respondents read white papers digitally; a similar percentage (77 percent) did the same with brochures/data sheets; and even more (84 percent) consumed case studies in this form. Yet in 2010, these numbers declined. The percentage that read white papers digitally dropped 15 full percentage points to 61 percent. The percent of respondents who indicated that they preferred to consume brochures/data sheets in digital form declined only slightly, but just 71 percent of respondents said they preferred to consume case studies in digital form—10 percentage points less than in 2009.

Figure 21. Did you view this collateral online or did you download/print before reading? (2009 vs 2010)

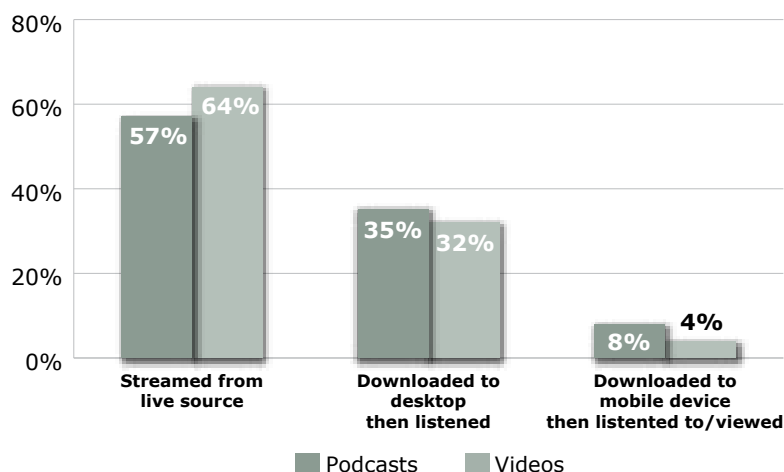


We also found significant changes in whether respondents downloaded audio files onto their desktops or mobile devices or listened to audio streams from Web sites. In 2009, 62 percent preferred to download audio files onto their desktop or mobile devices versus 38 percent that preferred to stream directly from a Web site. Yet in

2010, these numbers shifted substantially toward a preference for streaming: this year, 57 percent of respondents preferred streaming versus 43 percent that favored downloading these types of files.

This brings the method of consumption of audio files more in line with respondents' preferences for streaming video. Sixty-four percent of 2010 respondents preferred to watch video streamed live from the source, versus 36 percent that preferred to download it to a desktop or mobile device. (Figure 22)

Figure 22. Did you consume this content online, or did you download before viewing/listening?



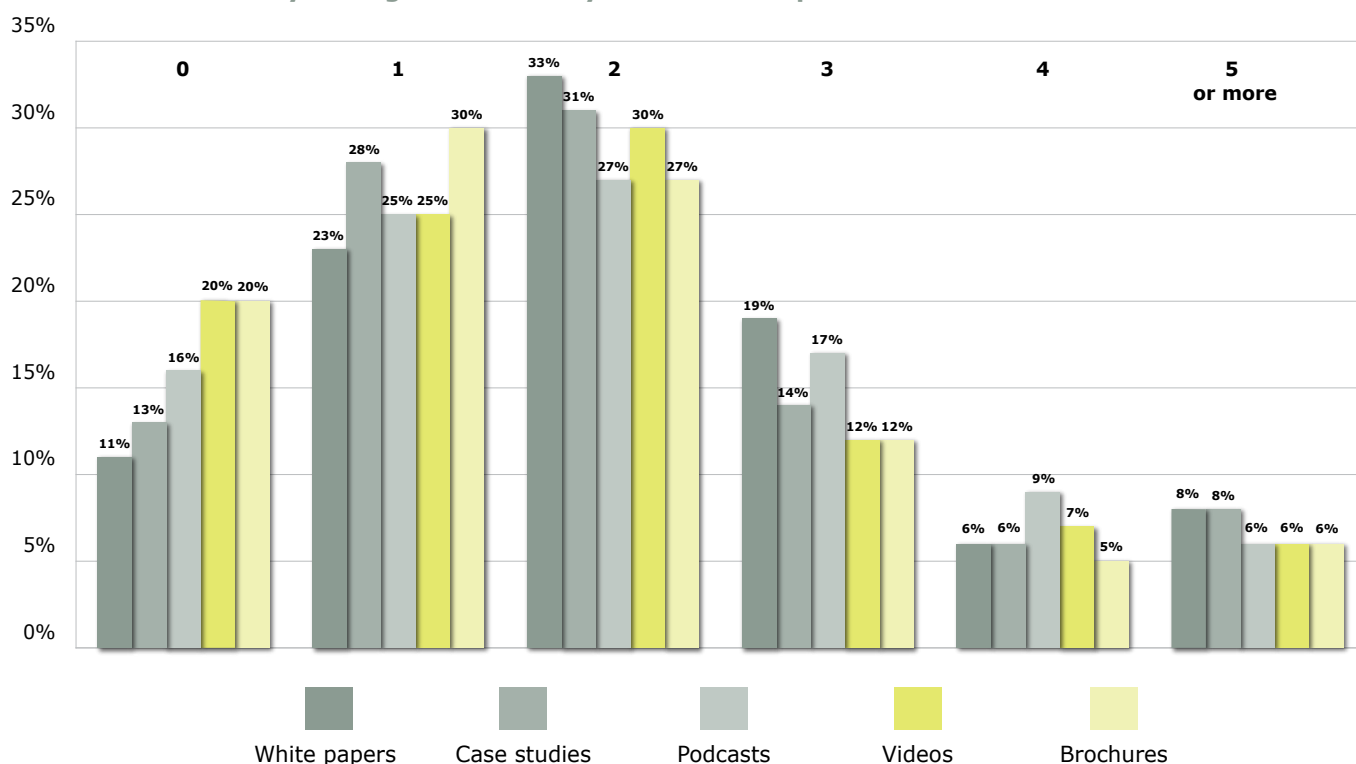
However, whether streamed or downloaded, 92 percent of podcast listeners and 96 percent of video viewers still consumed content on the desktop. This is a critical finding that has remained consistent from year to year: given that the desktop is the platform of choice for consuming all types of content, marketers should ensure that all written content leverages links to other files and other communication channels as much as possible, giving technology purchasers the option of drilling down to more details as desired.

All Collateral Has Viral Potential

We continue to be interested in the fact that all collateral is highly viral. Technology purchasers routinely share collateral, with the vast majority of 2010 respondents (89 percent) sharing the white papers they read with others, as seen in Figure 23. Nearly as many (87 percent) share case studies, followed by podcasts (84 percent) and then brochures/data sheets and video (80 percent each).

White papers are still the most viral, with 34 percent of respondents sharing them with three or more people. Thirty-two percent of respondents shared podcasts with three or more people, and 28 percent shared case studies with as many. Lagging slightly behind were video (25 percent) and brochures/data sheets (23 percent).

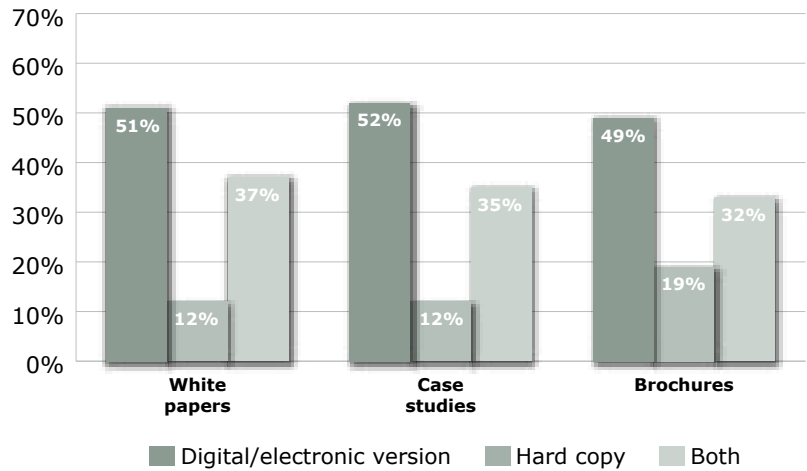
Figure 23. On average, how many other decision makers or influencers in your organization did you share each piece of collateral with?



Another interesting development: although all collateral is shared primarily in digital form, more 2010 respondents say that they share written collateral—white papers, case studies, and brochures/data sheets—in both digital and printed forms (Figure 24) than did respondents to the 2009 survey. For example, whereas the percentage of respondents who shared digital/electronic versions of white papers actually declined in the past year—from 60 percent to 51 percent—the percentage of respondents who shared white papers in both digital and printed form increased from 30 percent to 37 percent. We therefore caution marketers not to discount the viral nature of hard copy content, as it clearly still is considered useful by a significant percentage of respondents.

In 2009, influencers were more likely to share only digital copy and decision makers were more likely to share both printed and digital content. However, in 2010 this is no longer the case and these two respondent types are now in parity on this issue.

Figure 24. In what format did you share collateral?



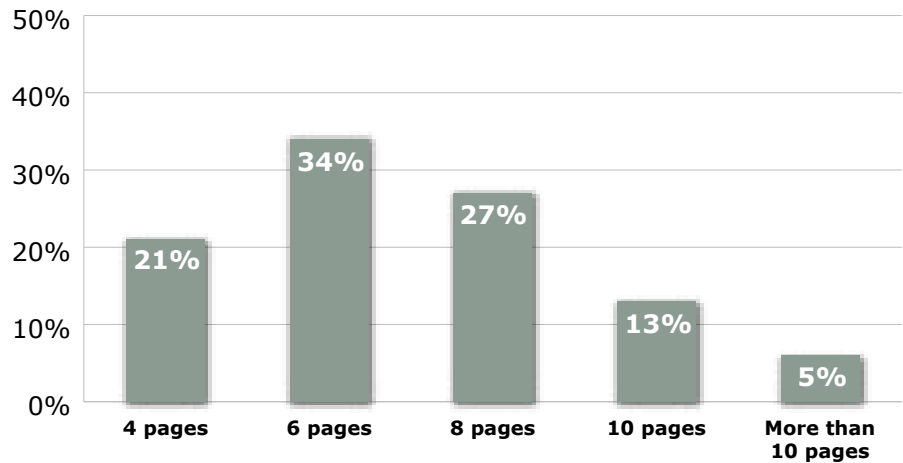
Preferences For Length Are Changing

Eccolo Media has established best practices for serving up marketing collateral in small, well-written packages. Our survey results over the past three years have reinforced our belief that this serves marketers best. However, this year we observed subtleties in the survey results that indicated respondents may be adjusting their preferences for longer collateral length.

White papers

We've stated repeatedly that white papers are a highly influential collateral consumed at a high frequency by both decision makers and influencers. But marketing communications professionals continue to debate the ideal length of a white paper: how do they give the right amount of information—not too much, and not too little? As Figure 25 shows, the majority of respondents (55 percent) felt six pages or less to be the ideal number. However, this percentage is 10 points less than last year's 65 percent.

Figure 25. What do you feel is the ideal length for a white paper in number of pages?



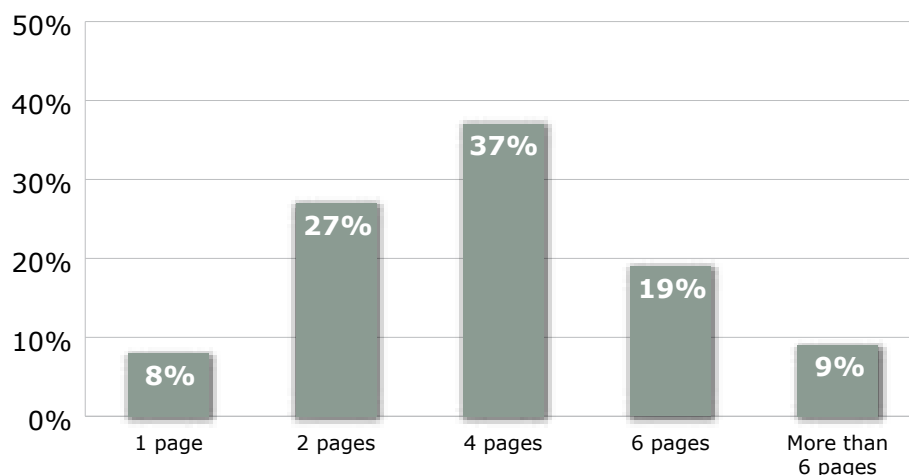
Simultaneously, the percentage of respondents who preferred white papers of just four pages dropped from 24 percent down to 21 percent, and the percentage of respondents who leaned toward eight pages increased from 21 percent to 27 percent. This indicates that the “ideal length” is shifting toward longer rather than shorter white papers.

There were no general differences in length preferences between decision makers and influencers, but technology purchasers from small companies tend to prefer shorter white papers, with 31 percent preferring four pages or less, compared to 19 percent of enterprise and 18 percent of mid-market companies that said the same.

Case Studies

In 2008, most respondents reported the ideal length of a case study to be two pages, or approximately 800 to 1,000 words. Yet in 2009, we received different responses. That year, the largest proportion of respondents (39 percent) indicated that four is the ideal number of pages for a written case study. This year’s 2010 survey backed up last year’s numbers, with 37 percent preferring four pages and virtually identical percentages of respondents preferring two pages or less (35 percent) or six pages or more (28 percent), as seen in Figure 26.

Figure 26. What do you feel is the ideal number of pages for a case study/success story?

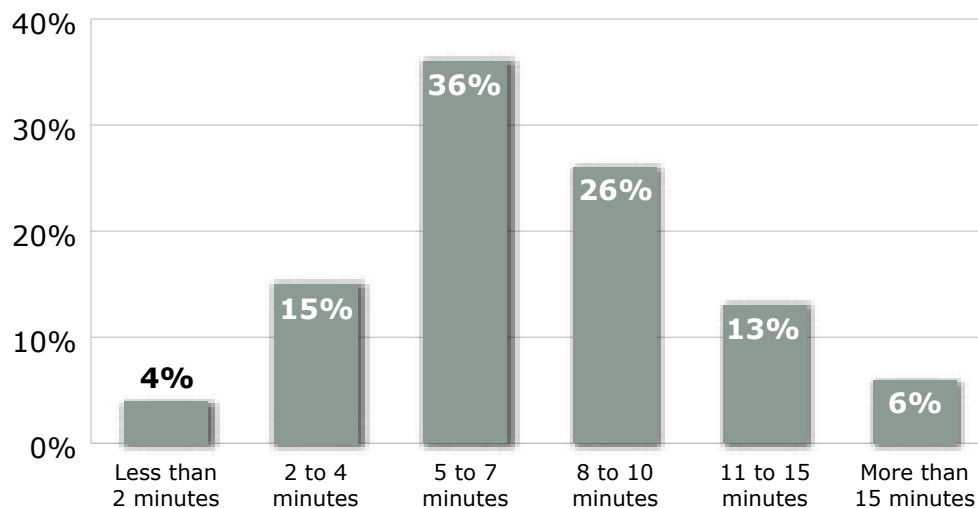


In general, the larger the company, the longer they prefer their case studies to be, with the largest percentage of respondents from small companies (33 percent) preferring two-page case studies, the largest percentage from middle-market firms (40 percent) and large enterprises (39 percent) preferring four-page case studies.

Podcasts

The ideal length of a podcast decreased in 2010. Figure 27 shows that the greatest number of respondents (36 percent) selected five to seven minutes as the ideal length. Most respondents (81 percent) prefer podcasts that are 10 minutes or less in length, and in general the smaller the company, the shorter they prefer their podcasts to be.

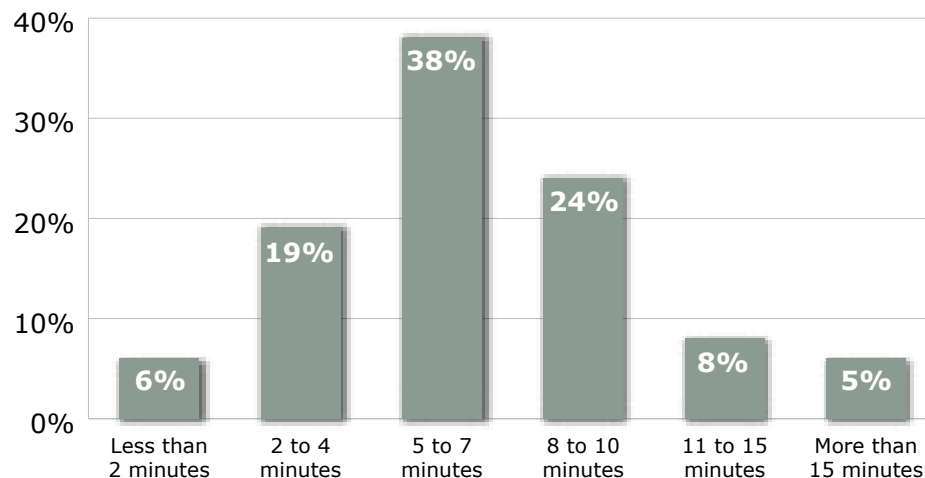
Figure 27. What do you feel is the ideal length of a podcast/audio file in number of minutes?



Video

The majority of 2010 respondents (38 percent) indicated that the ideal length of video content is five to seven minutes, while 24 percent preferred videos of eight to 10 minutes. (Figure 28) These results indicate a slight trending to shorter videos over the 2009 respondent's preferences for length, where 31 percent preferred five to seven minutes and 28 percent preferred eight to 10 minutes.

Figure 28. What do you feel is the ideal length of a video in number of minutes?

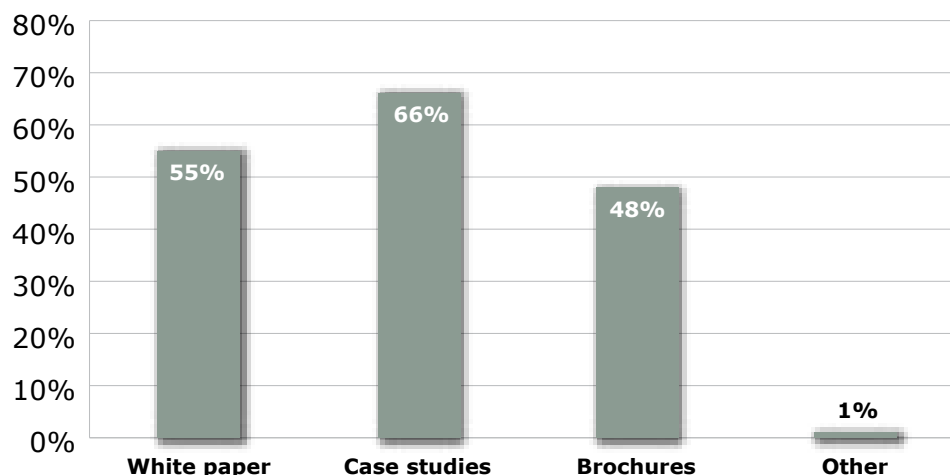


The Emergence of Embedded Audio and Video in Written Collateral

Over the past 12 months, Eccolo has participated in an emerging trend in marketing collateral: embedding audio and video files into digital versions of written documents such as white papers and case studies. We therefore asked respondents if they had consumed any written collateral that contained embedded audio and/or video files. A significant proportion of them—45 percent—said they had done so.

Respondents were most likely to encounter embedded files in case studies (66 percent), followed by white papers (55 percent) and brochures (48 percent). (Figure 29)

Figure 29. Which types of written collateral have you consumed that included embedded audio or video?



Perhaps the most dramatic of our findings in this part of the survey was the overwhelming percentage of respondents who clicked through to these embedded files: 93 percent. Twenty-five percent clicked through to video files; six percent clicked through to audio files; and 62 percent clicked through to both audio and video (Figure 30).

And most importantly, when respondents were asked whether the inclusion of audio or video files positively or negatively affected the overall influence of the written collateral, 80 percent indicated that they viewed it either “very positively” or “positively.” (Figure 31)

Figure 30. Did you click through or open any of the video or audio files embedded in the collateral?

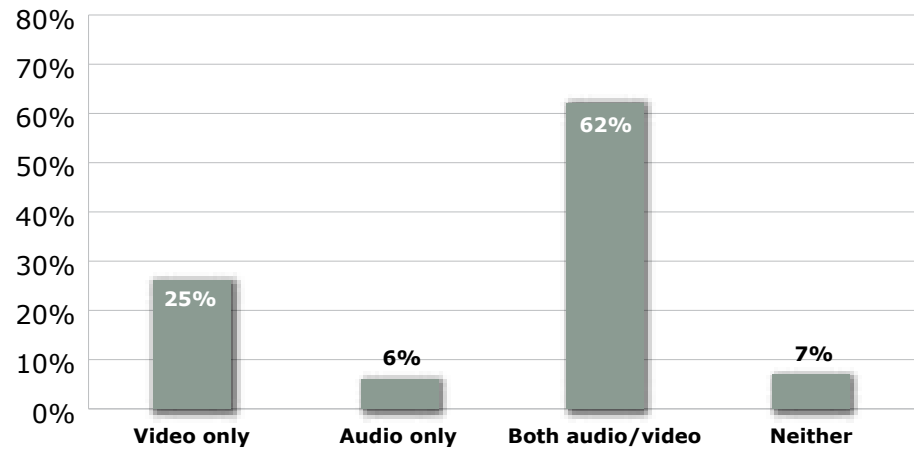
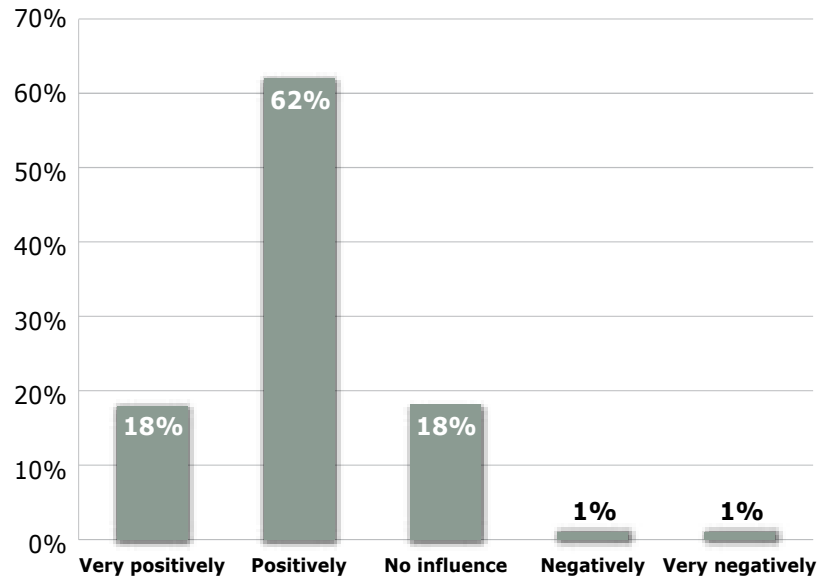


Figure 31. How did the inclusion of embedded audio and video files affect the overall influence of the written collateral?



In particular, decision makers felt this trend was positive: 83 percent ranked it as very positively or positively affecting the overall influence of the written collateral, compared to 74 percent of influencers. (Figure 32)

The size of company also mattered when it came to the perceived influence of embedded files, with enterprises more likely to indicate that it was very positive (26 percent) compared to middle-market (14 percent) or small firms (15 percent). On a related note, small businesses were more likely to say that embedded files had no influence at all—33 percent versus 15 percent of middle-market, and 15 percent of enterprise firms. (Figure 33)

Figure 32. How did the inclusion of embedded audio and video files affect the overall influence of the written collateral? (decision makers versus influencers)

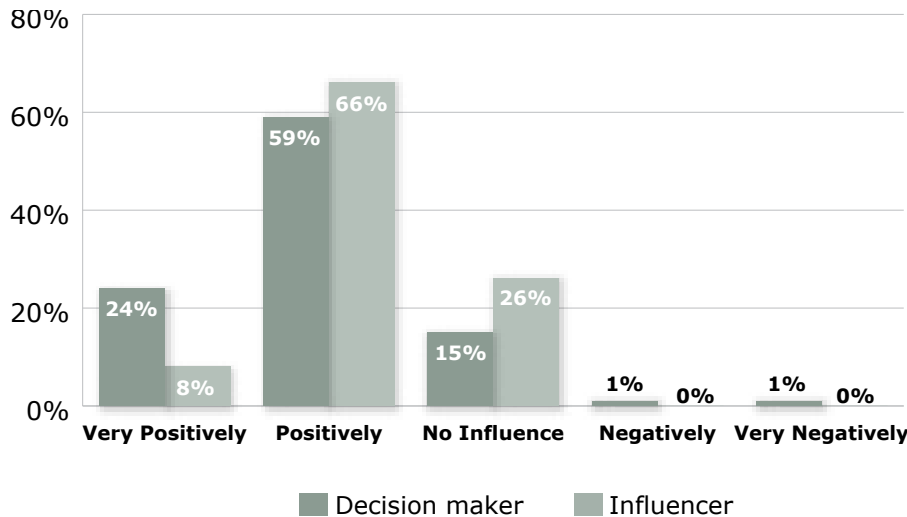
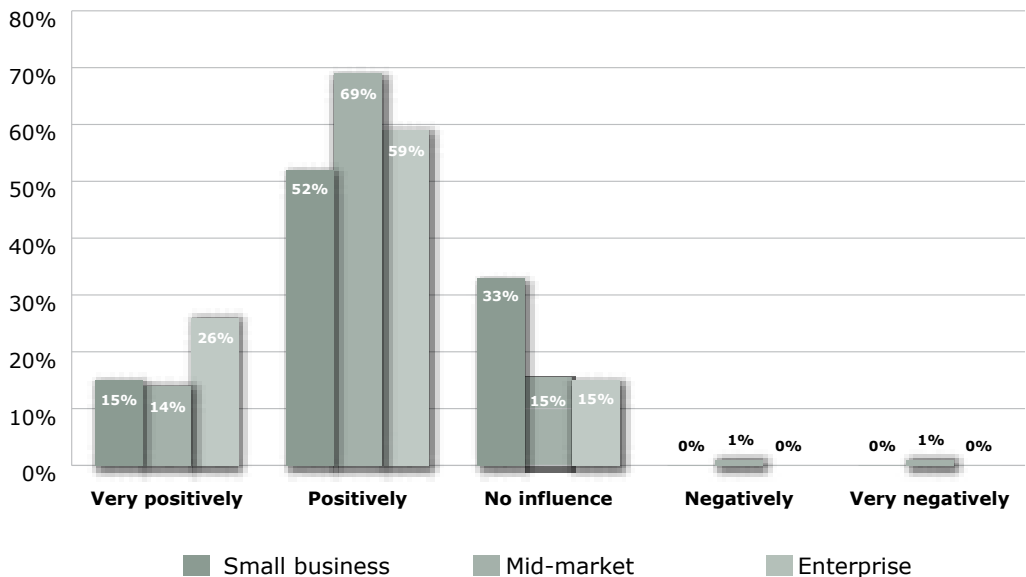


Figure 33. How did the inclusion of embedded audio and video files affect the overall influence of the written collateral? (small business vs mid-market vs enterprise)



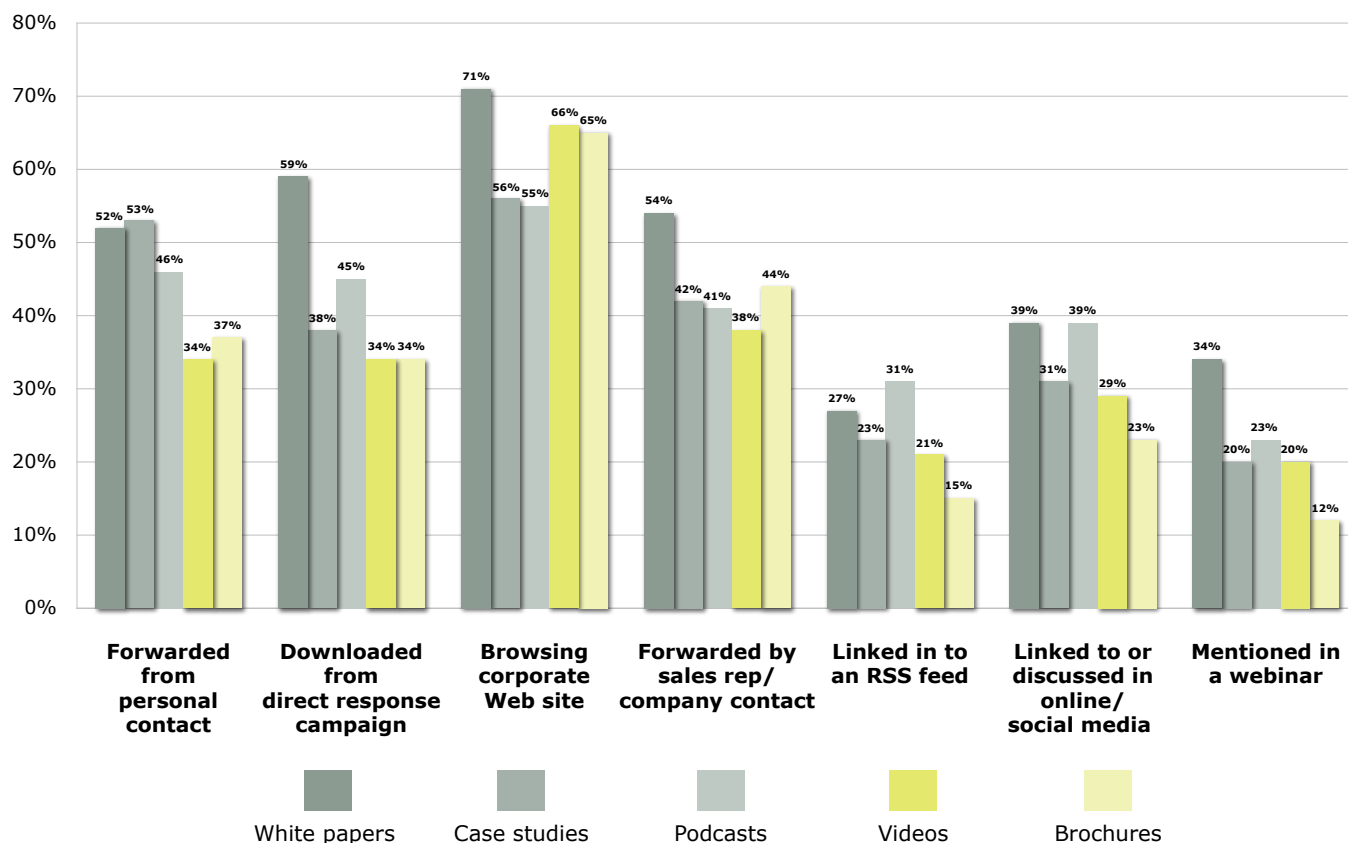
These results support Eccolo’s belief that interactivity is becoming “table stakes” for written marketing communications collateral. Given the preference that purchasers have already expressed for consuming collateral at their desktop (see Figure 22), marketers that don’t experiment with embedded audio, video, and other multimedia formats, as well as links off to other communications and social media channels, risk delivering assets that seem obsolete and old-fashioned.

The Channel Effect

Last year we added a section to our annual survey that investigated how channel affects the perceived influence of collateral. We defined channel as the specific avenue through which the respondent receives content—whether from a personal contact, from a corporate Web site, or from a sales representative, for example.

One fact immediately stood out in 2009: most respondents receive written collateral through the corporate Web site. (Figure 34) This did not change in 2010, with 71 percent of respondents finding white papers through such sites, 65 percent getting brochures/data sheets through that channel, and 56 percent acquiring case studies in that way.

Figure 34. Through which channels have you received collateral?

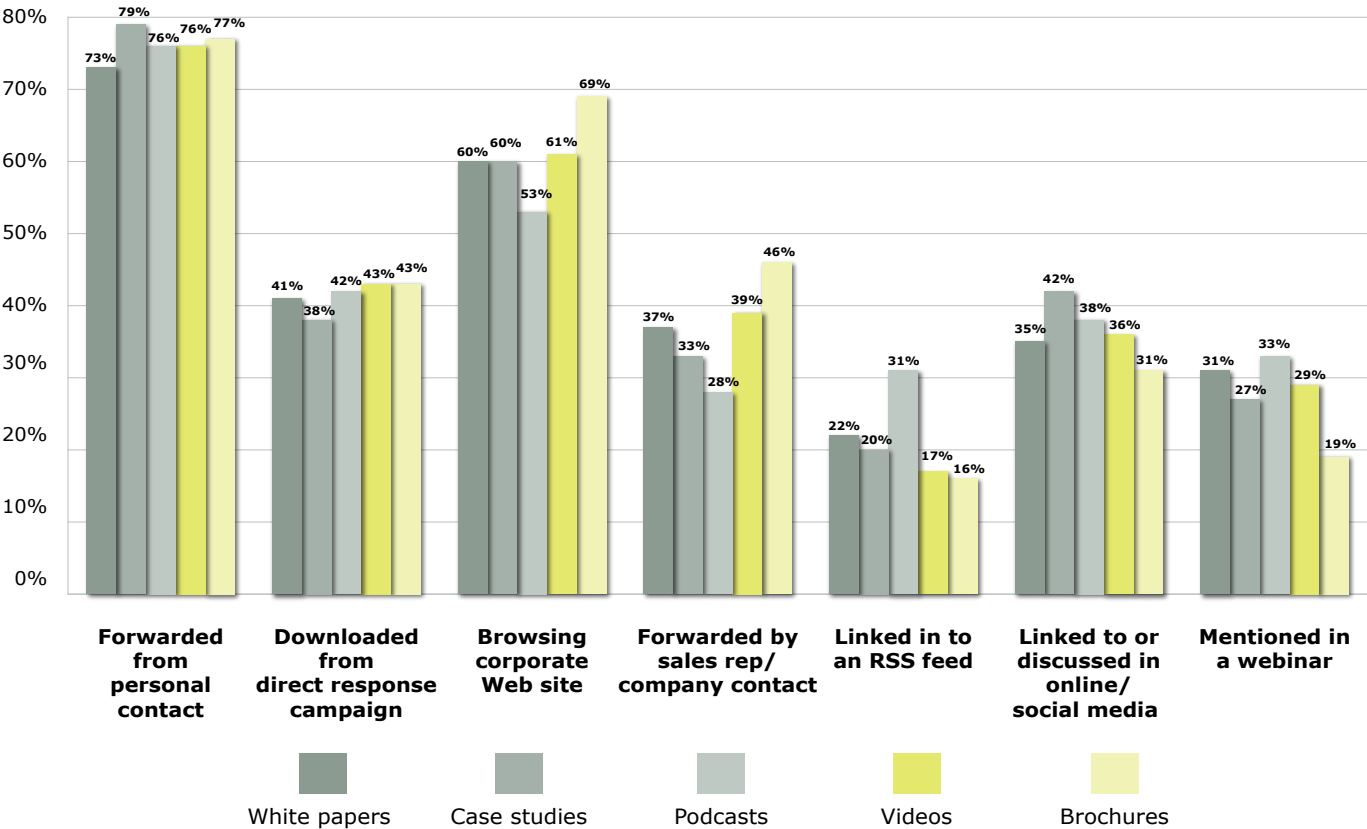


The next most frequently used channel for receiving a white paper in 2010 was a download from a direct response campaign (59 percent), which implies that this should be considered an important means of distribution for marketers. This was followed by forwarded by a sales rep/company contact (54 percent), obtained from a personal contact (52 percent), accessed via social media (39 percent), and absorbed through webinars (34 percent). In 2009, podcasts and video collateral differed from written content when it came to how respondents “found” them, but that difference

has vanished. Last year, podcasts were almost equally acquired from a personal contact or from a corporate Web site (48 percent and 49 percent, respectively). However, this year, the corporate Web site trumped the personal contact channel (55 percent to 46 percent). And this was even more dramatically the case for video, with only 34 percent of respondents indicating they had been forwarded a video by a personal contact while 66 percent found video on corporate Web sites. This trend underscores the importance of the corporate Web site across all collateral types.

When we examined the comparative influence of these various channels, another interesting fact emerged: although a piece of collateral referred to or forwarded by a personal contact was most frequently cited as the most influential channel for all types of collateral, browsing the corporate Web site was the second most frequently cited answer. (Figure 35) When you consider that the corporate Web site is clearly the most frequently used channel for collateral delivery coupled with its high perceived influence, you understand why we recommend that you make investing in and frequently refreshing your Web site a priority.

Figure 35. Positive influence by channel



Marketing Collateral in the Sales Cycle

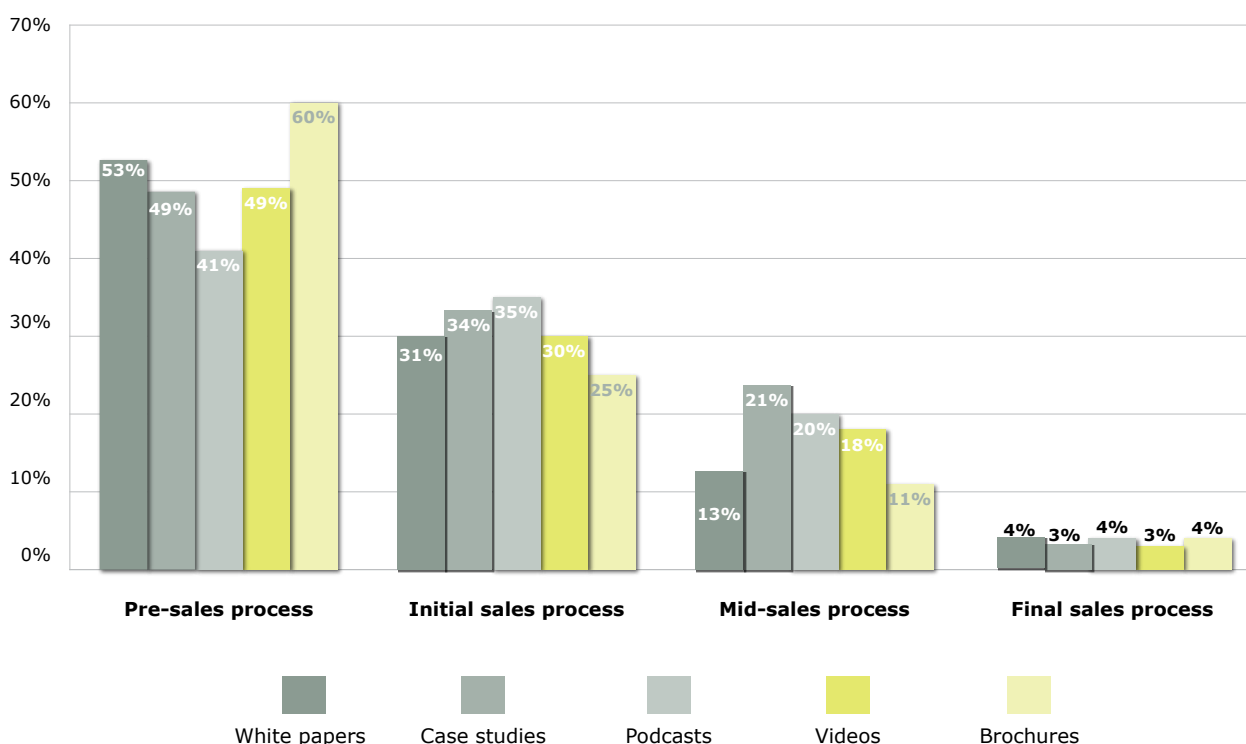
The relationship between collateral and actual sales is an important one. How do the various types of collateral—white papers, case studies, brochures—impact sales? When should you deliver a white paper, case study, podcast, or video to drive potential purchasers to the next step in the sales cycle? Is there a way to time delivery of specific collateral types to nurture leads more effectively?

For the purposes of this survey, we defined the various stages of the technology evaluation and purchase process as:

- Pre-sale—Considering solutions and vendors
- Initial sale—Reviewing vendor qualifications, capabilities, and RFP responses
- Mid-sale—Reviewing details of the solution with one vendor
- Final sale—Customization, negotiation, and procurement

In our 2008 survey results, we saw that respondents most frequently consumed each collateral type for the first time in the pre-sale process by a significant margin, that is, before they send out RFPs or initiate discussions with specific vendors. In that first Eccolo B2B survey, white papers were read by 61 percent of respondents during this phase, case studies by 48 percent, podcasts by 53 percent, video by 51 percent, and brochures/data sheets by 62 percent.

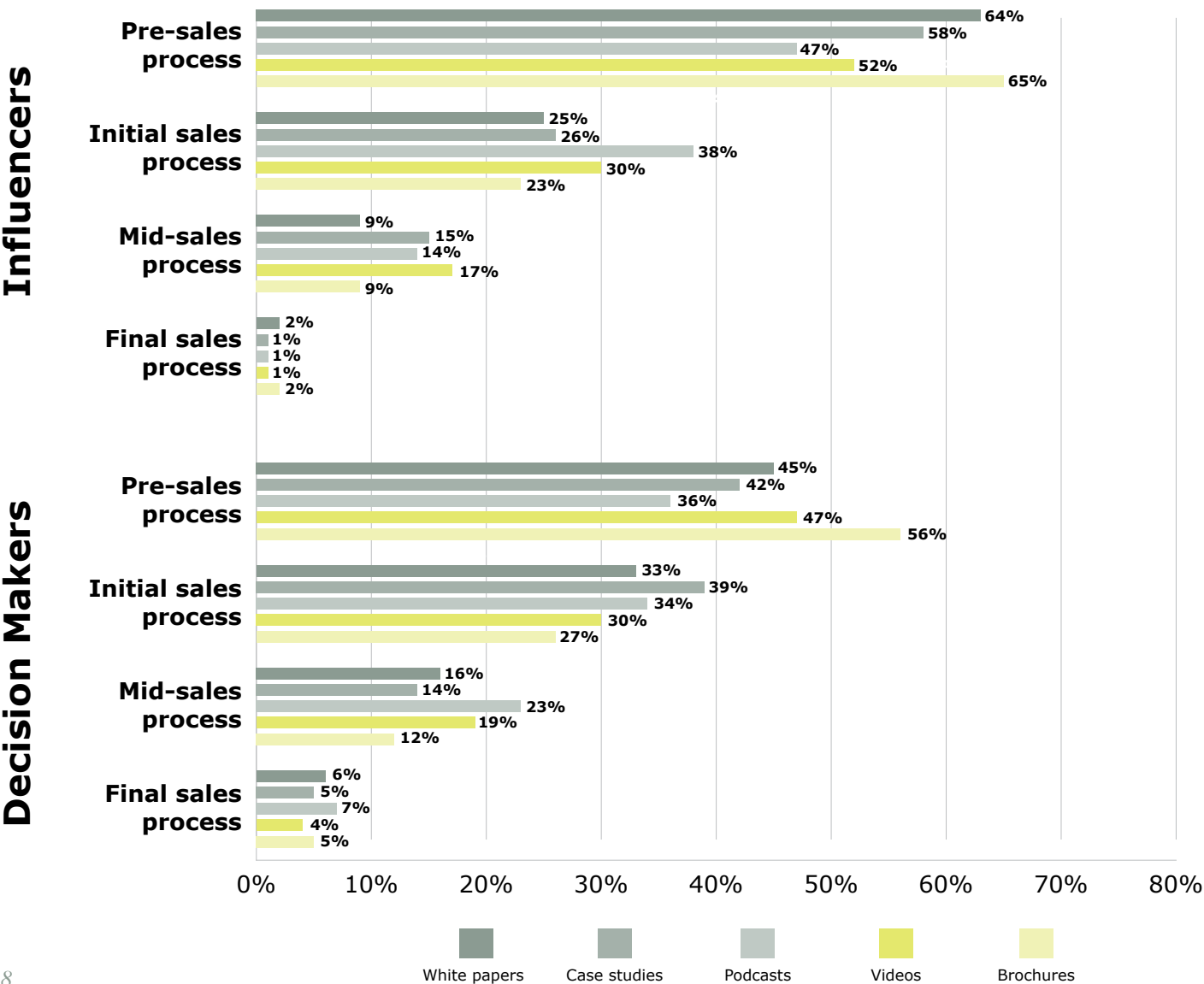
Figure 36. In which phase of the purchasing cycle did you FIRST consume each type of collateral?



Our 2010 survey indicates that these habits are shifting. While the majority of respondents still consume most collateral for the first time in the pre-sales phase, more respondents now indicate they first consumed collateral in either the initial sales or mid-sales phases than they did in 2008. For example, the percentage of respondents who first consumed a white paper during the pre-sales process dropped to 53 percent; the percentage that listened to a podcast dropped down to 41 percent. (Figure 36) In both cases, respondents appeared to move their first consumption of those types of collateral down to the next two stages of the sales process.

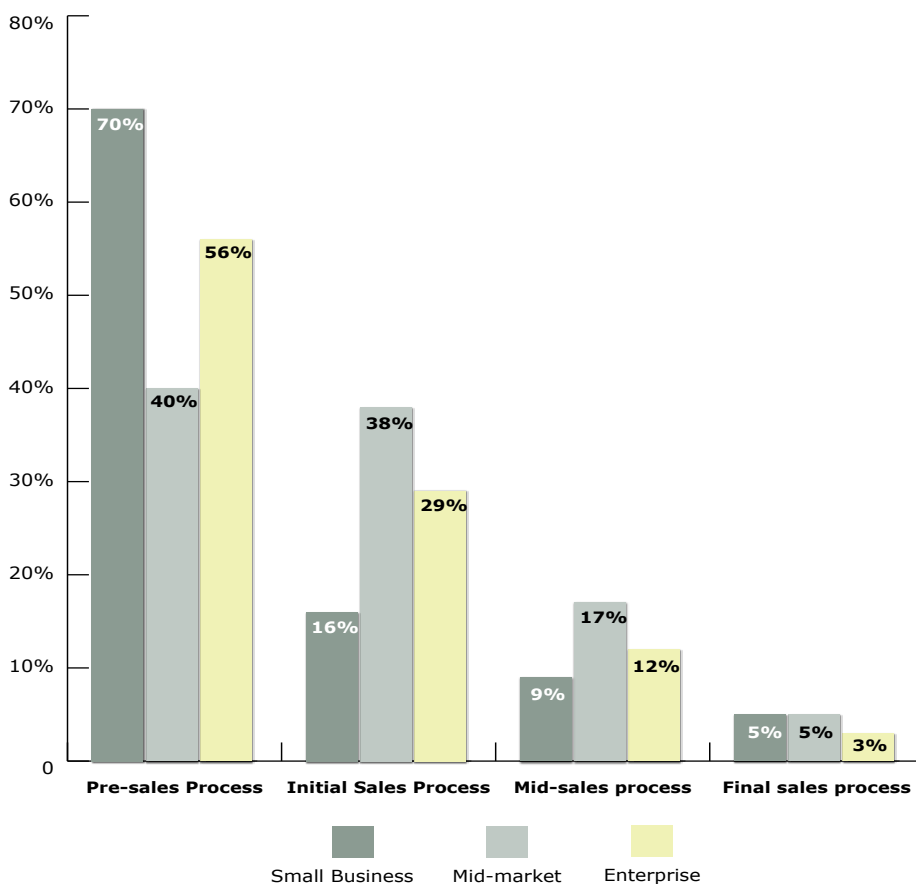
When we further segmented the 2010 data to compare the habits of influencers to decision makers, we observed some additional interesting trends: across the board, influencers tend to consume content earlier in the sales cycle than decision makers. (Figure 37)

Figure 37. In which phase of the purchasing cycle did you FIRST consume each type of collateral? (influencers vs decision makers)



Likewise, respondents from small businesses consume collateral for the first time during the pre-sales stage at much higher rates than respondents from middle-market or large companies. For example, 70 percent of small businesses consume white papers for the first time during this stage, compared to just 40 percent of middle-market firms and 56 percent of large enterprises. (Figure 38)

Figure 38. In which phase of the purchasing cycle did you FIRST consume white papers in 2010?



As in previous years, we find the data around use of collateral in the sales cycle interesting in the way it potentially sheds light on the relationship between influencers and decision makers. We believe we are seeing the influencer's role in terms of considering potential technology purchases and the subsequent sharing of that collateral and other information with decision makers a bit later in the cycle.

BEST PRACTICES FOR THE REAL WORLD

As in previous years, we conclude our delivery of the survey results by providing what we consider to be actionable advice that marketing professionals can apply right now to improve the quality and impact of their communications assets.

- 1. Create white papers.** This is a repeating theme but one that is definitely worth saying once again: white papers are frequently consumed and considered highly influential over the technology purchase. Take advantage by creating a few well-written papers that clearly outline strategic advancements your solutions and products are aligned with. Leverage your work by chunking up the main points into best practice documents, blog posts, “how to” guides, and other materials to support your broader campaign needs.
- 2. Embed multimedia files.** Start with short video or audio clips to keep overall file sizes low, but jump on this trend. Once you get your feet under you, you can advance to interactive charts and graphs, Flash elements, and other media types. Don’t ignore the opportunity to be among the first to take advantage of this evolving practice.
- 3. Consider all content to be social content.** We know that tech purchasers share content, and that they consider materials forwarded from a personal contact to be very influential. Plan all content and collateral assets from the perspective of stimulating discussion and sharing. Think about interactivity, links to discussion boards and user groups, and point to blog posts and other communications channels in all materials.
- 4. Deliver all content assets digitally . . . and be prepared to have end users print them.** While the majority of respondents view collateral assets on the desktop, a respectable number still enjoy printing out the materials they download and will further share print materials with others. Avoid cross-page spreads and column designs that are hard to read digitally, and remember to provide clear URLs for any links away from the materials for those reading print versions.
- 5. Merchandise content on the Web.** Your company Web site is the most frequent location for obtaining content, and it ranks second only to personal contacts in terms of influence. Make the most of this channel by merchandising featured content and assets on landing pages and microsites that extend the thought leadership and discussion begun in your collateral. Remember, potential purchasers interact with your content before they interact with you, so ensure viewers can easily see all the other channels through which they can engage with you all in one, fun-filled information portal.

CONCLUSION

As we wrap up this year's annual survey report, we find ourselves coming back to some basic advice that has been a theme of this section in each previous report: **plan.**

Eccolo believes that the requirement of content strategy—identifying communication topics and thoughtfully planning the assets required to achieve goals—is relevant at every level of the marketing organization. The proliferation of online channels and ever more sophisticated lead generation systems require a steady stream of fresh, relevant content to successfully engage purchasers. It's very easy to be distracted by looming deadlines and shifting priorities, but creating a content strategy and identifying a clear development roadmap that describes topic, format, and channel is essential if you truly want to improve results.

And the opportunity to improve results is significant. Well-planned development cycles can shorten time to market, reduce costs, and ensure a consistent message across all external assets. Further, organizations that show a healthy respect for content planning and development from the top down will experience the entire enterprise shifting to a more responsive stance. These companies are tuned toward deeper customer conversations that align with the end user's preferences for sales and marketing information, and by the very style of their collateral assets, signal a positive experience for the potential buyer.

Engage With Us

Eccolo Media welcomes your feedback on this report. Email us at info@eccolomedia.com with specific feedback, or visit our blog at <http://eccolomedia.typepad.com/> to join in our ongoing discussion of best practices in content strategy.

ACKNOWLEDGEMENTS

We would like to acknowledge the participation of the following team members for their efforts in bringing the *Eccolo Media 2010 B2B Technology Collateral Survey Report* to life: Maite Figueroa, Alice LaPlante, Lorie Loe, Courtney Love, and Michael Sudol.

ABOUT ECCOLO MEDIA

Eccolo Media specializes in strategic marketing insight and content development for some of the world's best-known technology companies. An agency of exceptional writers, Eccolo combines deep experience with ongoing research to identify and apply best practices for producing remarkable content. The agency helps align clients' marketing needs with their key business goals by bringing a proactive, innovative approach to the planning and execution of collateral in both traditional and new media channels. Founded in 2007, Eccolo Media is headquartered in San Francisco, California, and fulfills a wide range of project needs throughout the Americas and EMEA. Visit our Web site at www.eccolomedia.com.

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