eccolo media™

Eccolo Media 2008 B2B Technology Collateral Survey

November 2008

INSIDE

SUMMARY

Marketing commmunications professionals often view collateral and content development as a cost center—a requirement of doing business. At Eccolo Media, we strongly disagree. Our experience in collateral development and content strategy for technology companies has shown us that compelling content will establish brand, generate leads, and differentiate solutions. Further, well-planned content strategies can reduce development costs while maximizing the number of collateral tools.

In short, we believe that collateral and content have a clear impact. But we wanted proof—and that meant finding objective answers to fundamental questions. For example, what collateral types are the most influential when making a technology purchase? When do purchasers use collateral in the sales cycle? What makes content influential?

To that end, we conducted a survey of business technology decision makers and influencers within U.S. companies. We asked them about their preferred collateral types, how they used content, if they shared it, and just how influential it was on their final technology purchase. In this report, we provide the results of our survey, along with best practices that marketers can immediately apply.

ABOUT THE SURVEY

Eccolo worked with survey specialists at Zoomerang, the industry leader in online surveys, to identify and manage participants for an in-depth survey on the use of B2B technology collateral during technology purchases. Zoomerang distributed the online survey in August 2008 and provided the results as raw data to Eccolo Media.

Respondent titles included CIO, CTO, VP, director, IT manager, operations manager, business strategist, and process manager. All worked for U.S.-based companies. All were responsible for either making B2B technology purchases or influencing the decision. Only respondents who indicated that they had participated in a technology purchase in the last six months were included in the survey results.

Of the 155 respondents included, two-thirds identified themselves as technology purchase decision makers; the remaining one-third identified themselves as purchase influencers. The respondents were decidedly middle-aged. Nearly 70% were between 30 and 50 years of age, with 85% falling between 30 and 60 years old. More than half reported over 15 years of experience in the technology industry.

**Figure 1.
Respondents' role in the
purchasing decision**

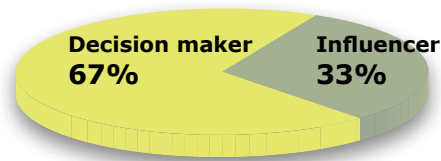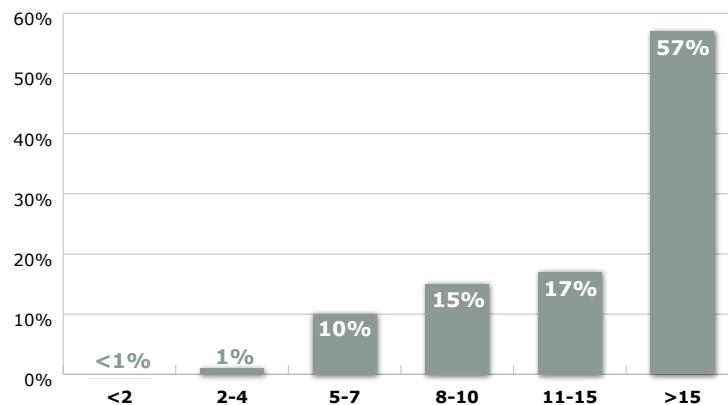Decision maker **67%** Influencer **33%**

Figure 2. Respondents' years in the technology industry

This survey did not examine *how* content was delivered (e.g., direct response, a leave-behind from a sales person, a referral from a colleague, or other delivery methods). The only criterion was whether or not the collateral was viewed, listened to, or read within the six months prior to a technology purchase.

We separated collateral into the following types:

1. White papers
2. Case studies/success stories
3. Podcasts/audio files
4. Video
5. Product brochures/data sheets

We then asked a series of questions about each type of collateral to determine respondent preferences. What collateral did they find to be most influential? When in the purchasing cycle did they tend to view specific collateral types? These questions, and more, were then analyzed for useful data points. When we were able to track statistical differences, we further analyzed responses against the respondents' age and their roles in the purchasing decision.

Presentation of data and discussion

As we prepared to deliver the results of the *Eccolo Media 2008 B2B Technology Collateral Survey,* we made a few choices as to how we could best present the data.

First, we found that organizing the key findings of our survey into the following areas provided a logical basis for discussion:

- The perceived influence of each type of collateral on the purchasing decision

- What our respondents think makes "good" (i.e., influential) content and collateral

- Preferences for specific collateral types as they relate to the sales cycle

Second, we used the survey results to develop a list of best practices for maximizing the impact of collateral and content development, and we included that list in the last section of our report.

And third, we elected to include data and commentary from similar industry reports and surveys when those reports served to illuminate or extend our conclusions.

KEY FINDINGS

The Sphere of Influence

Our data confirms that decision makers and influencers use a wide range of collateral types when considering a technology purchase. But just how influential is that content on the actual buying decision?

White papers most influential

The vast majority of respondents felt that a white paper was moderately to extremely influential in making the final purchase decision. Only one person thought that white papers weren't influential at all, and 44% thought they were at least very influential (Figure 3).

Figure 3. How influential are white papers in your purchasing decisions?
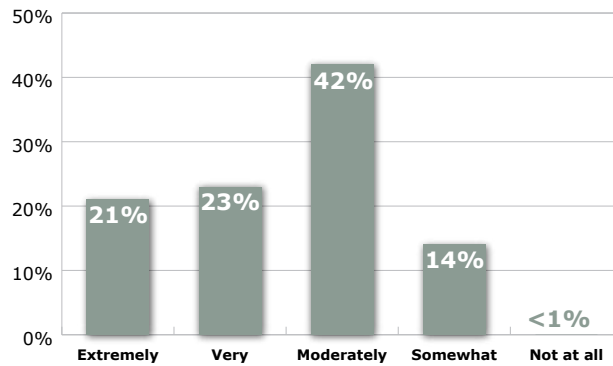
Further, when we asked respondents to rank collateral types from most influential to least influential (Figure 4), not only were white papers ranked as the *most* influential collateral type by the most respondents, but white papers were also most frequently ranked as the *second-most* influential collateral type—a combined 56% of survey participants.

Figure 4. Rank collateral viewed in the past 6 months in order of influence, with 1 being the most influential and 5 being the least influential.
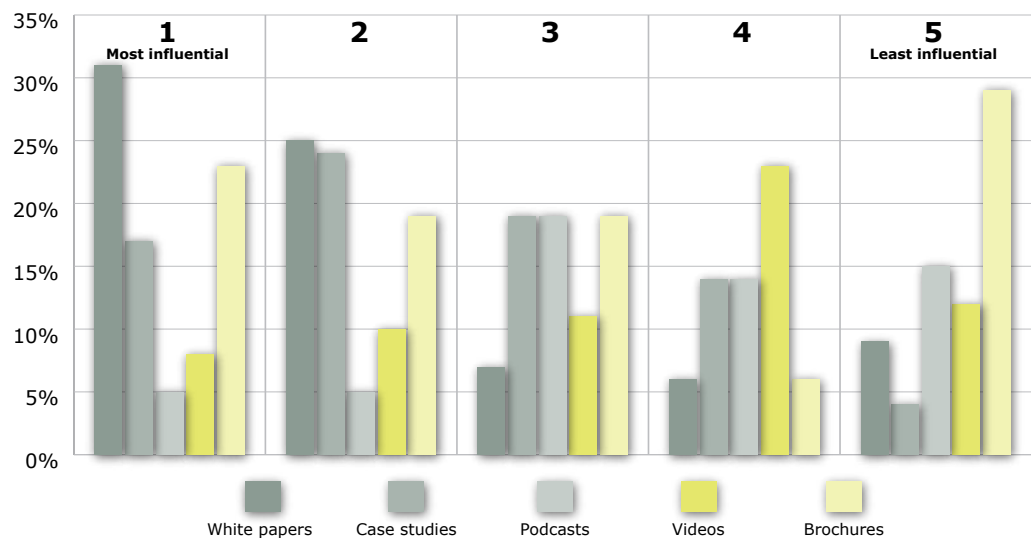
Case studies remain valuable

When asked how influential they felt case studies were in making a purchasing decision (Figure 5), 48% felt that case studies were very to extremely influential.

Figure 5. How influential are case studies in your purchasing decisions?
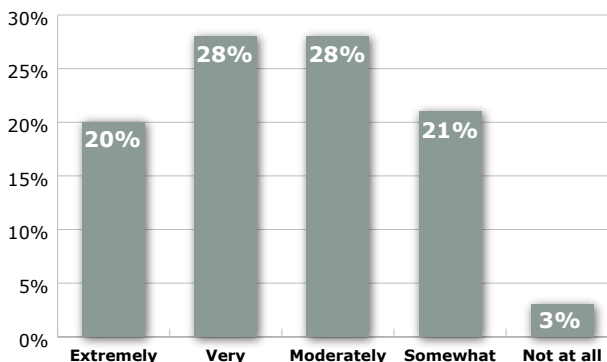
When compared to the influence of other collateral types, 41% of respondents ranked them as the first or second-most influential (Figure 4). This puts case studies in second place behind white papers in terms of influence, and in a virtual tie with product brochures and data sheets (42%).

According to a 2007 Tech Target and CMO Council survey, though the actual use of case studies by marketers was lower than other collateral, respondents found the effectiveness of case studies to be quite high—74.9% when compared to other collateral types.[1] The marketers in the survey appear to get the results they expect when they use case studies in the purchasing cycle.

### Podcasts make an impression

Podcasts play an increasingly significant role in the purchasing cycle. MarketingSherpa reports that in 2007, 78% of respondents had listened to technology-related podcasts at least once.[2] Of the respondents in our survey, 55% found podcasts and other audio files to be very or extremely influential, as seen in Figure 6.

When compared to other collateral types in our survey, podcasts hang toward the middle of the pack in terms of influence, ranked in a three-way tie with case studies and product brochures/data sheets as the third-most influential type (Figure 4 on page 4).

1 *Technology Buying and Media Consumption Survey, Report 4,* p. 65, www.techtarget.com and www.cmocouncil.org.
2 *Business Technology Marketing Benchmark Guide 2007-2008,* p. 21, www.marketingsherpa.com.

Figure 6. How influential are podcasts in your purchasing decisions?
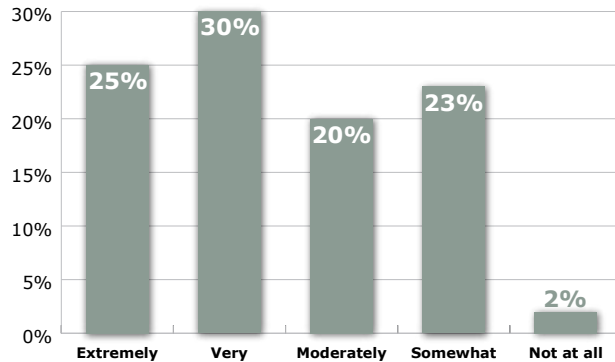
**Video collateral has not yet found its sweet spot**

When comparing influence of collateral on the purchasing decision (Figure 4 on page 4), video most frequently ranks as the fourth-most influential collateral type. However, when respondents consider video on its own merits, 54% found it to be at least moderately to very influential, as seen in Figure 7.

Figure 7. How influential are videos in your purchasing decisions?
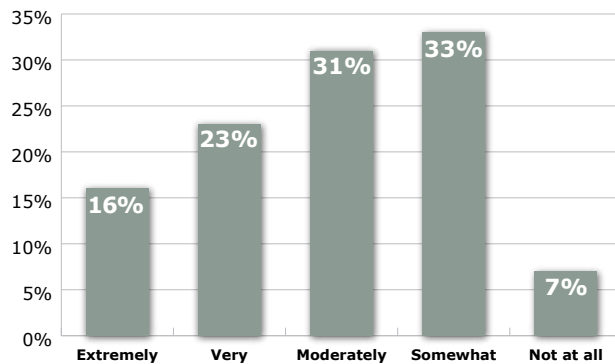
The production quality of the video has a significant impact on its perceived influence, with two-thirds of respondents indicating that quality was important. Of that group, 93% said that professionally produced, studio-quality video was more influential, as compared to just 7% who felt that a homemade, YouTube™-quality video was more influential (Figure 8).

Figure 8. What level of production quality do you consider to be most influential?

YouTube™ quality
7%

Studio quality
93%
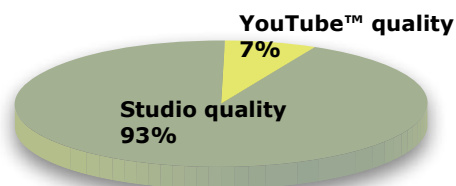
These results surprised us. We hypothesized that, given the ease with which raw video is consumed and shared on the Internet, video collateral produced without the bells and whistles of studio production would be considered more authentic by the viewer and therefore more influential. Granted, this particular respondent set is very small, and the survey question itself doesn't consider the nuances of content or purpose, but the result does imply that production quality affects perceived influence.

Brochures and data sheets consumed most frequently

Rounding out the sphere of collateral influence, product brochures and data sheets seem to play a unique role in influencing the purchasing decision. 60% of respondents found them to be at least moderately to very influential (Figure 9).

Figure 9. How influential are product brochures or data sheets in your purchasing decisions?
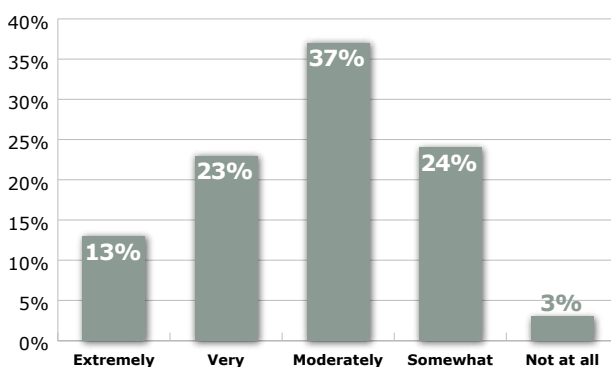
When compared to other collateral types (Figure 4 on page 4), brochures and data sheets were second only to white papers in the frequency of *most* influential rankings. However, they were also the most frequently ranked as having the *least* influence, that is, ranking as the fifth-most influential collateral type.

Their perceived lack of influence could owe to the fact that every technology company seems to have product brochures. Some purchasers may consider this type of content as an entry requirement rather than a differentiator.

Consider frequency of use along with perceived influence

It is helpful for marketers to evaluate the frequency of use of any one collateral type in addition to its perceived influence. For example, though product brochures and data sheets are most frequently ranked as the *least influential* when compared to other collateral types, they are also the *most frequently consumed* collateral, with 70% of respondents indicating that they have read a product brochure or data sheet in the last six months, as seen in Figure 10.

This high usage rate indicates that brochures and data sheets should be strongly considered for inclusion in any collateral toolbox. However, it would perhaps be unwise to let product brochures and data sheets stand on their own, given that their perceived influence is lower than other collateral types.

Figure 10. Number of respondents reporting that they used a specific collateral type in the last six months to evaluate a technology purchase
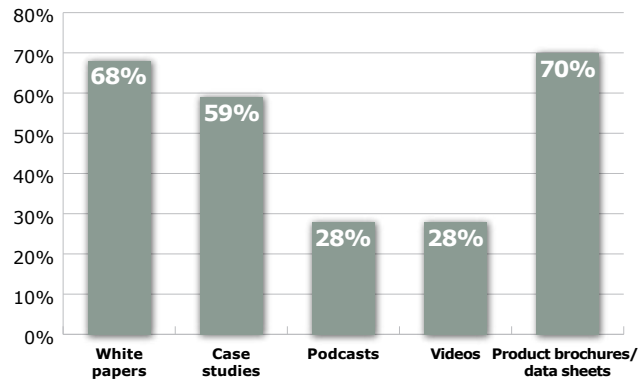

White papers came in a very close second to brochures and data sheets in terms of usage, with 68% of respondents reading one in the last six months. Multiply this high level of usage with the high perceived influence of white papers, and they become the "über-collateral" in this survey.

Consider the unique preferences of the audience segment
Frequency and influence may differ depending on such characteristics as age, gender, or role in the purchasing process. For example, Figure 10 shows that just 28% of respondents listened to a podcast or viewed a video in the last six months to evaluate a technology purchase—a fairly low usage rate. However, our survey data tells us that a majority of participants consider these collateral types to be at least moderately to very influential—a reasonable level of influence.

In one of the few instances in the survey where segmenting the respondents by age yielded some interesting differences, we discovered that the younger the respondent, the more likely it is that he or she has listened to a podcast or viewed a video to evaluate a technology purchase. As seen in Figure 11, 47% of respondents aged 20-39 indicated that they had listened to a podcast to evaluate a technology purchase in the last 6 months, compared to just 18% of respondents 40 or older. Video showed similar age correlations.

**Figure 11.
Age of respondents reporting that they had listened to a podcast to evaluate a technology purchase in the last six months**

Used a podcast
47%
Did not use
53%
Age 20-39

Used a podcast
18%
Did not use
82%
Age Over 40
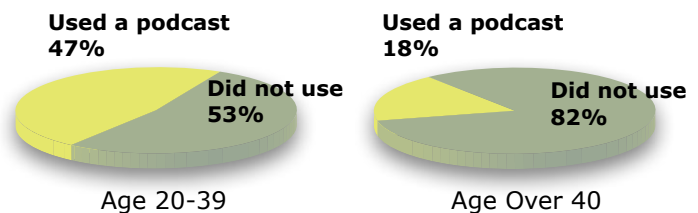
In this example, adjusting podcast frequency of use to consider the age of audience makes a significant difference, particularly when considered with perceived influence (Figure 6 on page 6).

The Consumption of Content

This section discusses what we were able to discover about how technology purchasers consume and use content and collateral. We also share what respondents believe makes "good" collateral.

Purchasers primarily view content and collateral on the desktop

One of the most compelling data points we uncovered was the overwhelming preference respondents had—regardless of the type of collateral they found most influential—to view content on the desktop. As seen in Figure 12, nearly three out of four respondents viewed white papers online, 77% read case studies on the desktop, and 70% of those who consumed brochures and data sheets skipped downloading and printing.

Figure 12. Did you view the collateral online or did you download/ print before reading/viewing?
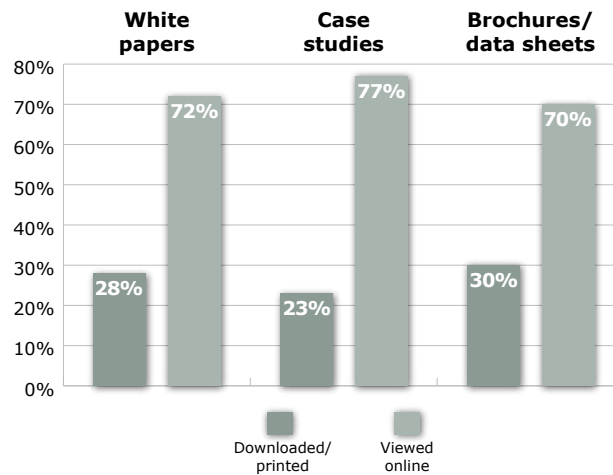
Respondents also preferred to stream audio and video files rather than download them from the Web. Figure 13 indicates that videos and podcasts were downloaded slightly more often than other collateral types.

Figure 13. When using audio or video collateral, did you download the file or stream it online?
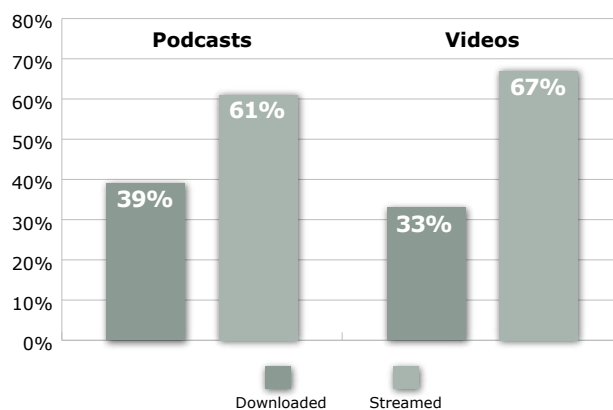
It is important to note that our question regarding downloading audio and video files did not clarify if the respondent then loaded the file onto another device, such as an MP3 player or mobile phone, to consume at a later time. It is possible that respondents downloaded the files and then still listened to or viewed them on their desktop. We may assume that the proliferation of mobile devices encouraged more respondents to download and take the file with them in some fashion; however, our survey does not provide data to support that assumption.
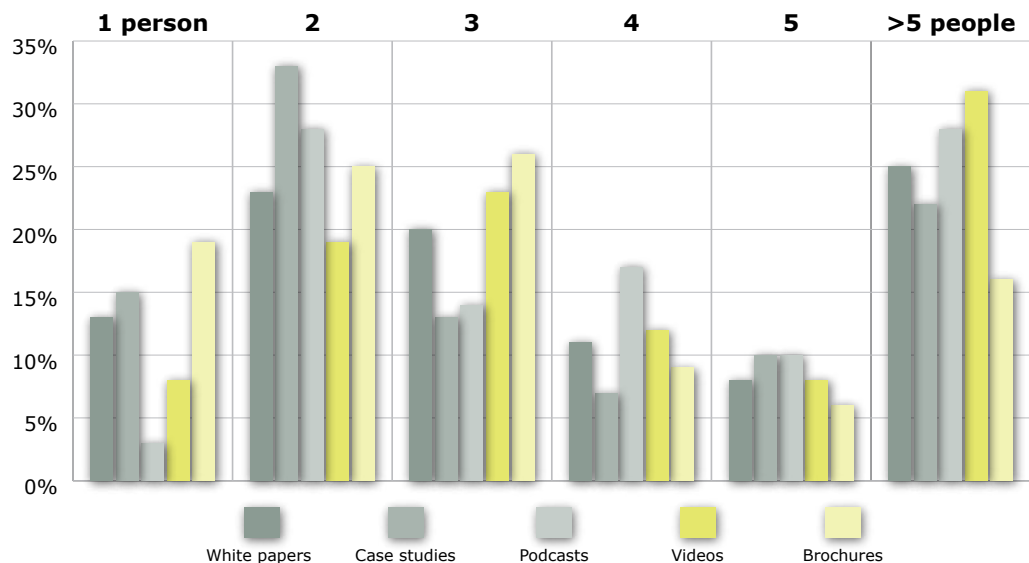
All collateral is highly viral
While previous surveys concluded that white papers were a very viral type of content, frequently passed among colleagues,[3] our respondents indicate that they share all collateral types with roughly the same frequency (Figure 14).

Figure 14. Did you share collateral with other influencers and decision makers in your organization?

White papers 67% / 33%
Case studies 65% / 35%
Podcasts 66% / 34%
Videos 60% / 40%
Brochures 64% / 36%
Yes / No
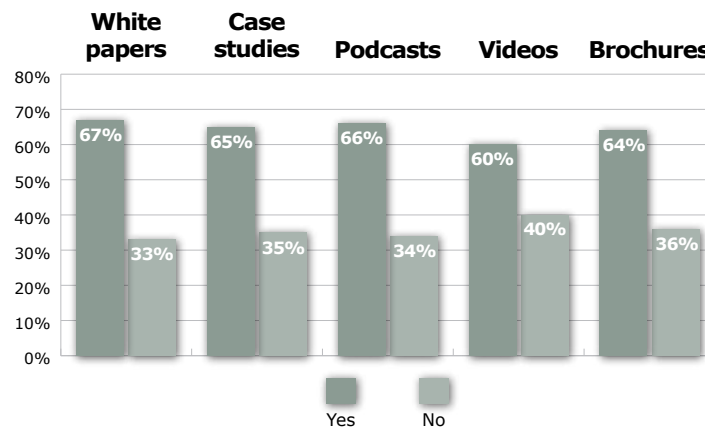
To zero in on the specific viral capacity of each collateral type, we asked respondents how widely they had distributed content among their colleagues.

Figure 15. If you shared the collateral, how many people did you share it with?

White papers, Case studies, Podcasts, Videos, Brochures

3 *Business Technology Marketing Benchmark Guide 2007-2008,* p. 178, www.marketingsherpa.com.

![eccolo media™]

We examined these data points in a variety of ways to gain some consensus on which collateral types tended to be shared with the greatest number of people. In general, the data trends toward podcasts and videos as more viral (when judged solely on the number of people with whom they are shared) than white papers and case studies. However, it is clear that product brochures and data sheets tend to be shared with fewer colleagues than other content types, and this is especially evident when looking at collateral shared with four or more people (Figure 16).

Figure 16. Respondents reporting that they shared a specific collateral with 4 or more people
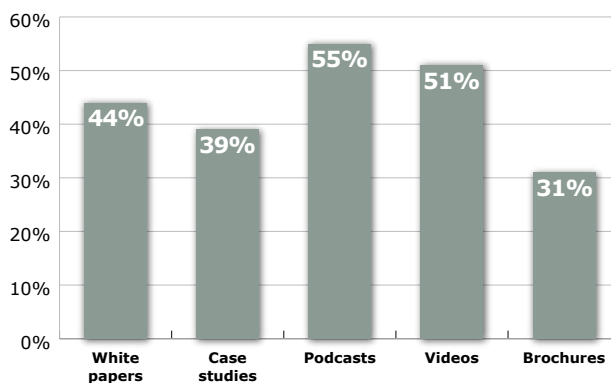
Though we do not have data to confirm this, we can reasonably assume that when respondents shared content with four or more people, their colleagues passed that content along for an even greater viral effect. At any rate, our data certainly confirms the highly viral nature of all content, and further highlights the need for collateral to be delivered in electronic formats to facilitate sharing.

Respondents want useful content delivered at a reasonable length
When asked what they found most influential when reviewing content, respondents showed marked preferences. Technology purchasers want useful content delivered as rapidly as possible.
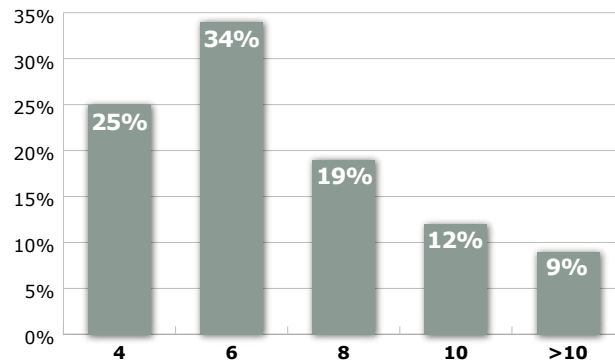
White Papers
As already stated, white papers are highly influential, consumed by both decision makers and influencers. According to the aforementioned Tech Target and CMO Council survey, readers are most frequently disappointed in white papers that focus on product information rather than on objective discussions of technology.[4] Purchasers expect to get product information from a product brochure or data sheet; marketers risk annoying their targets if white papers repeat this same information.

A subject frequently debated among marketing communications professionals is the ideal length of a white paper—the magic number of pages between not enough information and too much. As Figure 17 shows, the majority of respondents (59%) felt 4 to 6 pages to be the ideal number. This confirms a trend toward shorter white papers that we at Eccolo Media have observed anecdotally.

White papers are very viral for influencers. While 66% of decision makers said that they share white papers with others, influencers shared them more often by a wide margin (83%). This may relate to respondents' role in the purchase, with influencers passing on relevant information and decision makers considering the content more often than sharing it.

---

4 *Technology Buying and Media Consumption Survey, Report 4,* p. 19, www.techtarget.com and www.cmocouncil.org.

**Figure 17. What is the ideal number of pages for a white paper?**

Interestingly, decision makers prefer more concise white papers (64% said their preferred length was 4 to 6 pages) while influencers liked them a bit longer (70% said their preferred length was 6 to 8 pages). This highlights the importance of understanding the audience and delivering collateral to that audience's preference rather than trying to create one-size-fits-all white papers.

Podcasts and Video
While most marketers present thought leadership and information on new technologies within the white paper format, we were curious if respondents would find value in audio or video "white papers"—thought leadership and technology developments presented in an audio or video file. As seen in Figure 18, a majority of respondents said that they would find value in white paper content if it were delivered in these alternative formats.

Figure 18. Would you find white paper content as influential if you received it in an alternative format, such as a video or audio file?
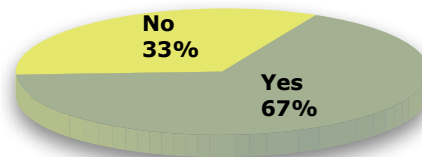
Further, when asked to specify which format they would prefer, the vast majority of respondents (87%) preferred video, versus 13% who preferred audio.

We then asked respondents to rank the influence of podcast speakers based on their role, from most influential to least influential. Figure 19 indicates that, while third-party analysts were ranked slightly more often as the most influential, a clear majority ranked a company employee as the least influential speaker in a podcast. Other rankings are not as clearly delineated, although third-party analysts or customers seem to be more influential than a company spokesperson.
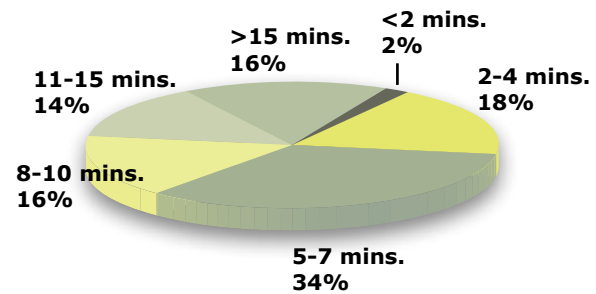
Figure 19. Rank the following speaker types in a podcast from most influential (1) to least influential (3).
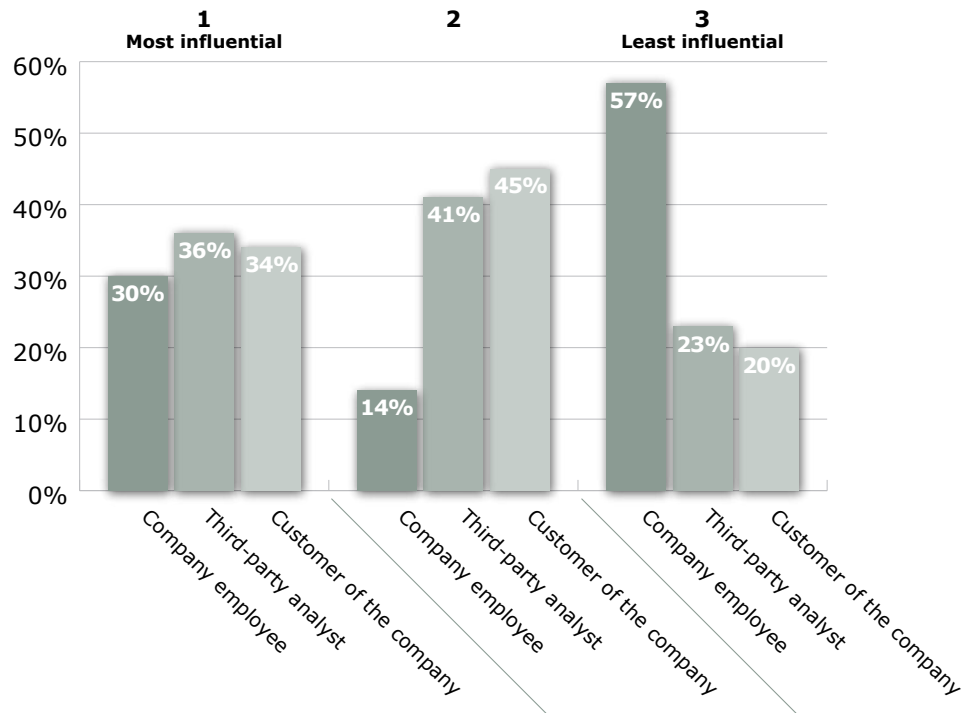
A majority of respondents found product information to be the most influential type of content when delivered as a podcast (55%) or video file (67%). Third-party analysts were frequently ranked as the most influential speaker type in both of these formats (Figures 19 and 21). This indicates that product information delivered by a third-party analyst would be the most influential combination of content and speaker for podcast and video collateral.

When asked to consider the ideal length of a podcast in minutes, Figure 20 shows that the majority of respondents selected 5 to 7 minutes as the ideal length. 70% of respondents prefer a podcast that is 10 minutes or less in length.

Figure 20. What is the ideal length for a podcast (in minutes)?

When considering video collateral, third-party analysts or experts were ranked as the most influential type of speaker, while a company employee was found to be the least influential speaker type by a significant margin (Figure 21).

Figure 21. Rank the following speaker types in a video from most influential (1) to least influential (3).
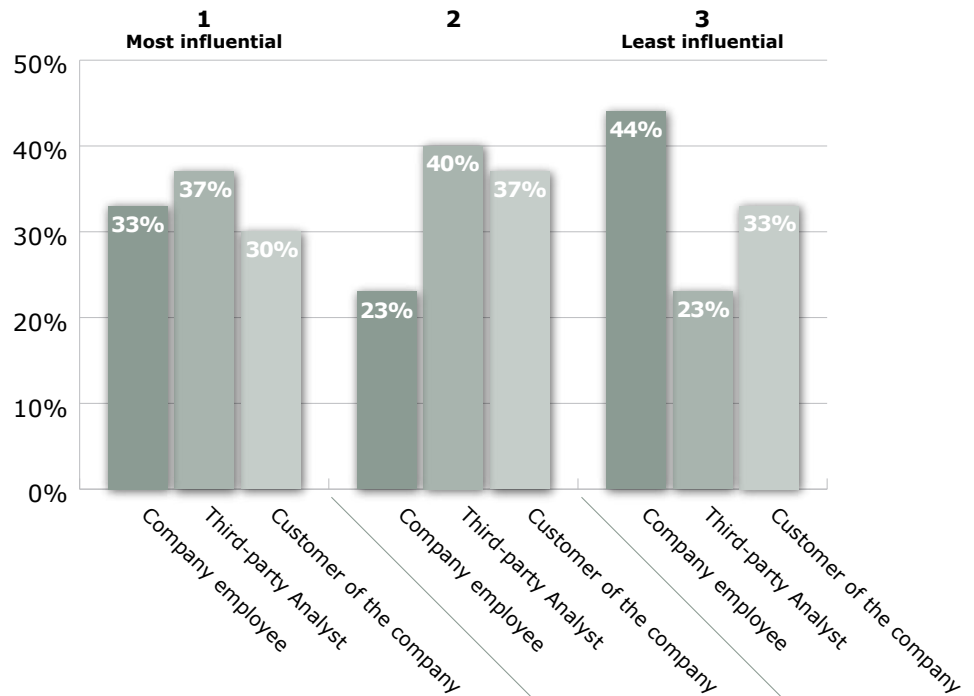
Case Studies

Eccolo Media has observed that two pages, or approximately 800 to 1000 words, is the standard length for case studies or success stories in the technology industry. Figure 22 shows that the majority of respondents agree with this, choosing 2 pages as the ideal number of pages for a written case study. This was very closely followed by 4 pages as the second-most frequent response. In general, 77% of respondents preferred case studies of 4 pages or less.

Figure 22. What is the ideal number of pages for a written case study?
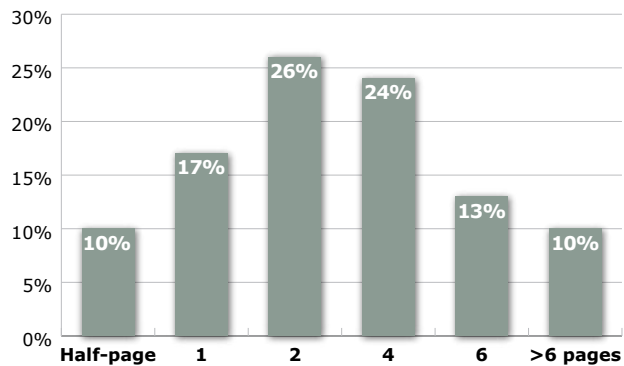
Also of note, a majority of respondents (57%) said that they would find a customer testimonial presented in an audio or video format more influential than a written case study. However, before marketers abandon written case studies entirely for podcasts or video testimonials, recall that written case studies *are* considered to be moderately to extremely influential by a majority of respondents and are consumed more often by a wide margin. Better to provide this content in an array of media types to meet a variety of preferences.

Content in the Technology Sales Cycle

Every marketing communications professional is concerned with how content and collateral affect or drive the sales process. When should a white paper or a podcast be delivered to facilitate the purchaser's move to the next step in the cycle?

We asked technology purchasers and decision makers to tell us when they first read, viewed, or listened to each collateral type within the cycle. 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, procurement

Figure 23. At what point in the sales cycle did you first review each type of collateral?
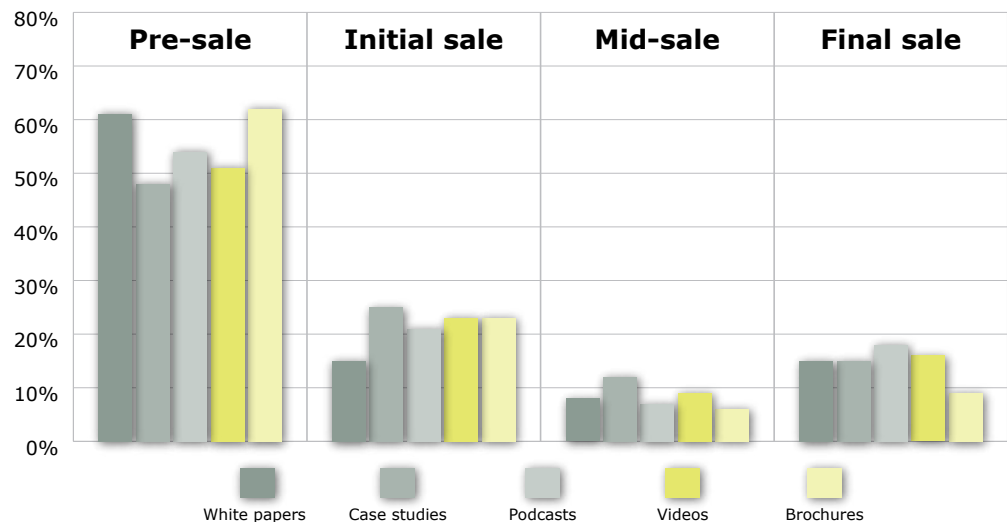
Pre-Sale Phase

We can see in Figure 23 that a wide majority of respondents most frequently consume each collateral type for the first time in the pre-sale process, that is, before they send out RFPs or initiate discussions with specific vendors. Product brochures and data sheets are read in this phase for the first time by 62% of respondents, followed closely by 61% of respondents who read white papers, 54% who listen to podcasts, 51% who view videos, and 48% who read case studies.

Initial Sale Phase

The frequency of first use for every collateral type drops significantly from the pre-sales phase to the initial sales phase. First-time white paper readership drops to 15%, while those using case studies drops to 25%, podcasts to 21%, and video and product brochures and data sheets drop to 23%.

However, when considering first-time collateral use in the pre-sales and initial sales phases together, the data indicates a flurry of activity. 76% of respondents read their first white papers, 73% view case studies, 75% listen to podcasts, 74% watch videos, and 85% read product brochures and data sheets, clearly marking this time of entry into the sales cycle as highly important for marketing communications.

Mid-Sale Phase

The mid-sales phase sees the least first-time content use in the business cycle. Just 8% of respondents use white papers for the first time during this phase, 12% use case studies, 7% use podcasts, 9% use videos, and 6% use product brochures and data sheets. It appears that once a potential technology vendor has made the shortlist, collateral becomes less important in moving the cycle forward.
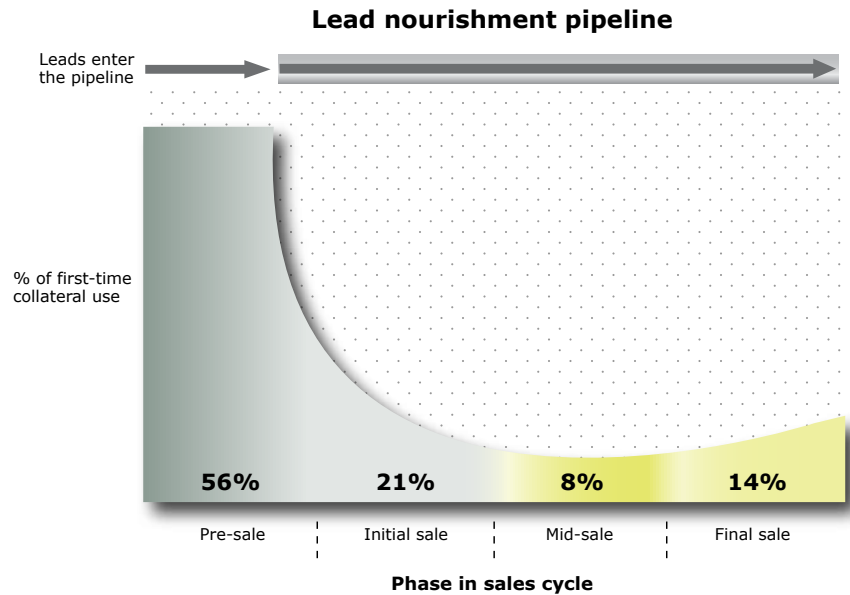
Final Sale Phase

With the exception of product brochures and data sheets, our survey found a small but statistically significant increase of first-time collateral use as purchasers move from the mid-sales phase into the final sales cycle. 15% of respondents view white papers and case studies for the first time, 18% listen to a podcast, and 16% view a video. However, just 9% read product brochures and data sheets in this phase. It is reasonable to assume that this overall up-tick is part of a final due diligence: reviewing projected business gains, ascertaining potential return on investment and total cost of ownership, vetting customer references and use cases, and perhaps watching product demonstrations.

The role of collateral in the sales cycle emerges

Now we begin to see the overall picture of the role that collateral plays within the sales cycle, as seen in Figure 24.

Figure 24. First-time collateral use in the sales cycle

Clearly, respondents consumed the majority of collateral in the pre-sales/initial sales phase. First-time use precipitously drops in the mid-sales phase, with a slight increase in first-time use in the final sales phase. Figure 24 suggests that all collateral types are important in bringing sales leads into the pipeline and moving purchasers to a serious sales discussion, but at that point other factors take over in driving the lead to the final sale. We would speculate that once the initial assessment is complete, discussion of unique solution requirements with the sales team and solution engineers usually finalizes the cycle.

CONCLUSION: REAL-WORLD CONTENT STRATEGIES

Based on our survey results, we have developed a list of best practices that you can apply immediately both to the development of any single piece of collateral and to your overall content strategy.

1. **Create white papers and leverage white paper content**
   Our survey indicates that nothing gives more bang for the buck than a well-crafted white paper. It comes in a very close second as the most frequently used collateral and is considered across the board to be the most influential. Marketers owe it to themselves to make white papers a high priority when developing their content strategy.

   Remember that the majority of respondents prefer white papers to be 4 to 6 pages in length. They also prefer an objective technology discussion, not product information. Influencers appear to prefer a bit more detail in the

discussion, while decision makers like their white papers to be briefer and to the point. Also look at leveraging white paper content in other formats—Web abstracts, audio discussions with objective participants, or as part of blog discussions—to leverage this highly desirable content.

2. Product brochures and data sheets shouldn't stand alone

While our survey indicates that product brochures and data sheets vary widely in terms of influence, they are the most often consumed collateral type when considering a technology purchase. They need to be part of any content strategy; to a certain extent, they may be the price of entry for consideration in a technology purchase. Keep in mind that other collateral types are shown to have greater influence in the sales cycle, so marketers should not rely on product brochures or data sheets alone to move leads through the pipeline.

3. Consider influence, frequency of use, and audience preference

Include collateral types in your plan that have both a high perceived influence and a high frequency of use for your specific audience type.

4. Make all collateral available in the pre-sales phase

The importance of having a wide variety of digital content and collateral—taking into consideration length, topic, and audience preferences—could not be more critical in the pre-sales and initial sales stages. In fact, we can reasonably infer that having subpar content, or not having the appropriate content at all, can preclude an organization from even making it to a vendor shortlist.

And remember, today's technology purchaser is more likely to interact with your content before they interact with you. This puts the onus on your collateral to convey brand, capabilities, and value in a way that increases interest and leads to a next step. Don't ignore this reality and plan collateral accordingly.

5. Make lead-generation programs content-based

Because purchasers prefer to consume content even before they enter the lead nourishment pipeline, lead-generation campaigns can benefit from being content-based. Driving recipients to a white paper download, a podcast discussion, a technology microsite, or a new use scenario can provide the incentive necessary to place you at the top of the vendor shortlist.

6. Leverage content in as many formats as possible

Allow your audience to find and consume your content in the format they prefer by reusing content in as many collateral types as you can manage. For example, never produce just a 2-page case study when you can also leverage it as a Web abstract, as an audio or video testimonial, or even as a slide to insert into internal or external-facing presentations. By taking this approach, marketers not only amortize costs over a number of communications tools, but are also able to meet the collateral preferences of the widest variety of purchasers.

7. Deliver electronic versions always; deliver print versions only when required

Purchasers prefer to interact with your collateral and content on the desktop. Serve this preference by providing all collateral in digital form. Electronic content is easy to forward to other influencers and decision makers, greatly increasing its viral capacity. Then take further advantage of purchasers' online reading habits by inserting hyperlinks or other HTML content into digital versions. This allows the reader to access relevant Web pages rapidly, request additional information, and even link to other materials within your collateral library, greatly extending the reach of any one document.

Do recognize that print versions of your collateral may still be a preferred format for some of your audience. A certain segment still finds value in a leave-behind or in print collateral shared at a trade show, for example. Appropriately plan a content strategy that takes these print and electronic preferences into account.

8. Design collateral for desktop viewing

Cross-page spreads or graphic-intensive collateral are not optimal when reading online. Desktop readers are typically looking at one page at a time and can be frustrated when required to scan graphic and content elements across multiple pages. Understand this constraint and work with designers accordingly.

Thinking strategically about content lowers development costs

Finally, plan content and collateral proactively, with the same consideration you would bring to any business strategy. While internal clients will always drive spontaneous demand for more collateral tools, marketing organizations that constantly operate from this reflexive mode will spend unnecessary time and money developing content.

Collateral doesn't have to be a cost center. Well-planned content strategies amortize costs by taking best advantage of existing resources and allowing you to leverage content across multiple formats. Considering influence and frequency can help you justify your choices and your budget. We sincerely hope that this survey report and our best practices will provide the guidance you need to make a great start.

ACKNOWLEDGMENTS

ABOUT ECCOLO MEDIA

ec•co•lo \'e-ko¯-lo¯\ adv [Italian] Here it is

Eccolo Media, Inc. is a marketing communications agency that specializes in content and collateral development for technology companies, offering industry leadership in understanding and creating content that leverages both traditional and new media channels.

Driven by a true passion for technology, Eccolo's extensive and documented experience has elevated its capabilities to the category of content strategy, providing a degree of operational expertise and strategic insight that delivers superior value to its clients.

In 2008, Eccolo Media was nationally certified as a Women's Business Enterprise by ASTRA Women's Business Alliance, a regional certifying partner of the Women's Business Enterprise National Council (WBENC). Founded in 1999, the company is headquartered in San Francisco, California, and serves clients throughout the United States. Visit Eccolo Media's Web site at www.eccolomedia.com.