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2011 RFID MARKETING STRATEGIES REPORT

RFID JOURNAL IN ASSOCIATION WITH BURNELL REPORTS

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ABOUT THE AUTHORS

RFID Journal is the leading source of news and in-depth information about radio frequency identification (RFID) and its many business applications. Business executives and implementers depend on **RFID Journal** for up-to-the-minute RFID news, in-depth case studies, best practices, strategic insights and information about vendor solutions. This has made **RFID Journal** the most relied-upon and respected RFID information resource, serving the largest audience of RFID decision-makers worldwide—in print, online and at face-to-face events.

Burnell Reports is committed to helping people understand and take advantage of emerging technologies and business practices. The firm conducts market research, develops educational content and provides marketing communications, public relations and communication consulting services to technology companies, research firms and industry associations. It is headed by John Burnell, who has been involved in the RFID industry since 1990 as a journalist, event organizer, marketer and researcher. Visit *www.BurnellReports.com* for more information.

INTRODUCTION

The "2011 RFID Marketing Strategies Report" found that radio frequency identification is maturing as an industry and growing as a community. This maturity is reflected in the content preferences of end users, prospective end users and industry professionals—all said they favor substantive information and indicated a newfound appreciation for standards. The growing sense of community and its importance within the RFID industry is reflected in that RFID-focused solution providers and information sources hold much more influence over respondents than those focused on their particular industry, and respondents value RFID experience more than ever. Note that in Figure 1 below, while the influence of RFID company communications and media each remained consistent with 2009 levels, the influence of professional sources rose, driven by a 10 percent spike in those who responded that professional sources are a "strong influence."

The audience remains hungry for information regarding RFID technology and companies, and clearly prefers quality, in-depth sources—such as white papers, analyst reports and webinars—to newsletters, blog posts and online discussion groups. For example, end users are about twice as likely to download and read an RFID analyst report as they are to check in on an online RFID discussion, which would take much less time.

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FIGURE 1: WHAT INFLUENCES PERCEPTIONS OF RFID PRODUCT AND SERVICE PROVIDERS?

	STRONG INFLUENCE	SOME INFLUENCE	LITTLE INFLUENCE	NO INFLUENCE	RESPONSE AVERAGE
PROFESSIONAL SOURCES (CONSULTANTS, ANALYSTS, SYSTEMS INTEGRATORS)					
2011	**49%**	**36%**	**11%**	**4%**	**2.30**
2009	39%	44%	13%	4%	2.19
THE RFID COMPANY'S OWN SOURCES (MARKETING COMMUNICATIONS, WEB SITES AND DIRECT SALES)					
2011	**33%**	**52%**	**12%**	**3%**	**2.15**
2009	33%	49%	13%	7%	2.07
MEDIA SOURCES (MAGAZINES, MEDIA-RUN NEWSLETTERS AND WEB SITES)					
2011	**23%**	**54%**	**20%**	**3%**	**1.97**
2009	21%	60%	16%	5%	1.96

In 2011, respondents plan to use social media less than any other information resource or communications channel, by a wide margin. Respondents consistently rated social media as the least important and influential source of information—just as blogs were rated in the "2009 RFID Marketing Strategies Report" study. Since 2009, however, the number of respondents who said blogs were important for learning about RFID companies rose by 26 percent—the largest increase for any resource. Now, 69 percent of respondents say blogs are at least somewhat important for learning about RFID companies. As RFID marketers and their audiences gain experience with social media, its influence could make a similar jump.

Finding the right medium only solves part of the puzzle for reaching the RFID audience. Marketers also need to craft the proper message. The results of the "2011 RFID Marketing Strategies Report" show that quality content with targetted messaging is essential for attracting and influencing RFID information seekers. The RFID audience is much more impressed by the quality of information it receives about vendors than with the frequency with which it hears about them. Promoting every new product or partner agreement adds noise to the market that can make it harder for more important messages to be heard.

RFID end users recognize the distinction between a vendor's depth and its breadth, and clearly favor companies with a true commitment to the RFID market, direct experience, focused partners and marketing materials more oriented to educating than to promoting. The balance of this report provides data and insight about the tactics, resources and mediums that are most effective for reaching RFID buyers, as well as the messaging and information that most influenes them.

SCOPE AND METHODOLOGY

All results of the "2011 RFID Marketing Strategies Report" are based on a survey of **RFID Journal**'s audience, conducted during November and December 2010. The survey was sent to 28,221 individuals via e-mail, and a follow-up survey was sent a month later. Respondents were offered a chance to win one of five **RFID Journal** premium subscriptions, or an Apple iPad. There were 568 usable responses, for a response rate of 2 percent, though response rates for each question vary. The complete survey is presented in Appendix A.

Many questions asked about the relative importance or influence of specific factors. Respondents were asked to rate the importance of each on a scale of zero (the lowest option) to four or five—the higher the number, the more influential or important the item measured.

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Response averages were used for 57 questions. The response average is included in many tables, and can be used to quickly compare how respondents valued different response options. Response averages for total respondents ranged from a low of 1.61 (the influence that advertising frequency has on how a company is perceived) to a high of 3.21 (the likelihood that respondents will read or download an RFID vendor case study). Responses may not total 100 percent due to rounding.

This report makes frequent references to "industry professional," "channel" and "end-user" respondents. End users are defined as respondents who answered "no" when asked if they worked for a company that provides RFID products or services. All other respondents are considered industry respondents, which consist of RFID hardware manufacturers, software vendors, value-added resellers (VARs), systems integrators and consultants. When the terms "industry respondents" or "industry professionals" are used, they refer to this total group. The term "channel" refers to the subset of industry respondents consisting of VARs, systems integrators and consultants (non-makers of RFID hardware or packaged RFID software).

Several sections (including Figure 1, in the Introduction) refer to "sources of information." Sources were grouped and defined according to their role in the industry: "Professional sources" are resellers and integrators of vendor products, consultants and analysts; "media" includes electronic and print publications; and "company sources" includes an RFID vendor's personnel and direct sales efforts, as well as marketing communications and other materials generated by a company.

This report also makes reference to the importance and influence of various factors. When references to "importance" or "influence" are presented in quotation marks, they refer to the actual response data for that question. When the words "important" or "importance" are used without quotation marks, they are used in a general sense. If something is said to be important to respondents (for example, a product's brand is important to about 83 percent of those who replied), the term refers to the sum of "very important" and "somewhat important" responses, and any options in between.

FIGURES A THROUGH H PROVIDE DEMOGRAPHIC DATA ABOUT THE RESPONDENTS

FIGURE A: WHERE ARE YOU BASED?

United States or Canada	52%
Mexico, Caribbean, Central or South America	5%
Asia	14%
Europe	21%
Middle East	4%
Africa	2%
Australia or Oceania	2%



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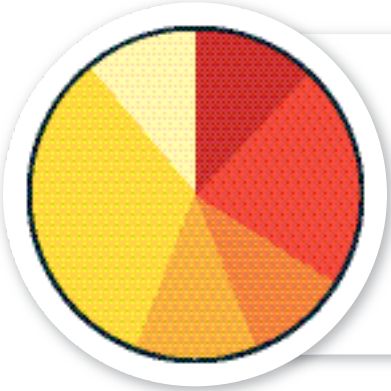


FIGURE B: WHICH OF THE FOLLOWING BEST DESCRIBES YOUR COMPANY:

Academic	12%
End user or potential end user of RFID technology	22%
RFID hardware manufacturer	10%
RFID software provider	12%
RFID systems integrator/reseller/distributor/ consultant/other channel company	33%
Other (please specify)	11%

FIGURE C: IF YOUR COMPANY SELLS RFID PRODUCTS OR SERVICES, ARE YOU PRIMARILY A:

Consultant	24%
Hardware manufacturer	10%
Software provider	13%
Systems integrator/reseller/distributor/ channel company	31%
Other (please specify)	22%



FIGURE D: WHICH OF THE FOLLOWING BEST DESCRIBES THE INDUSTRY YOUR COMPANY IS IN?

AEROSPACE / AVIATION	4%
APPAREL / FOOTWEAR / ACCESSORIES	1%
AUTOMOTIVE	1%
CHEMICALS / ADHESIVES	1%
CONSULTING / BUSINESS SERVICES / LEGAL	8%
CONSUMER ELECTRONICS / ELECTRONIC COMPONENTS	2%
CONSUMER PACKAGED GOODS	1%
EDUCATION / LIBRARY / RESEARCH	6%
ENERGY / UTILITY	1%
ENTERTAINMENT / MEDIA / PUBLISHING	1%
FINANCIAL SERVICES / VENTURE CAPITAL	1%
FOOD / AGRICULTURE	2%
FORESTRY / PULP / PAPER	0%
GOVERNMENT / LIBRARY / NONPROFIT	4%
HEALTH CARE / PHARMACEUTICAL	9%
IT – SOFTWARE, HARDWARE, SERVICE PROVIDER	17%
LEGAL SERVICES	0%
MANUFACTURING	9%
MILITARY / HOMELAND SECURITY	2%
RETAIL	4%
PACKAGING / LABEL MANUFACTURING	3%
RFID HARDWARE, SOFTWARE OR SERVICES	13%
TRANSPORTATION / LOGISTICS	3%
TRANSIT OPERATOR	0%
OTHER (PLEASE SPECIFY)	7%

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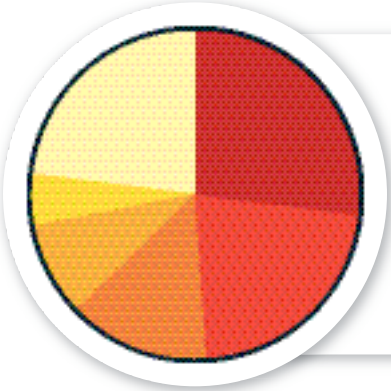


FIGURE E: WHAT IS THE SIZE OF YOUR COMPANY BY ANNUAL REVENUE?

Less than $1 million	27%
$1 million to $10 million	22%
$11 to $100 million	14%
$101 to $500 million	9%
$501 million to $1 billion	5%
More than $1 billion	23%

FIGURE F: HOW LONG HAVE YOU BEEN READING ABOUT, LEARNING ABOUT, OR GENERALLY FOLLOWING RFID TECHNOLOGIES?

Less than 1 year	12%
1 to 2 years	15%
2 to 3 years	17%
3 to 4 years	15%
4 to 10 years	32%
More than 10 years	9%



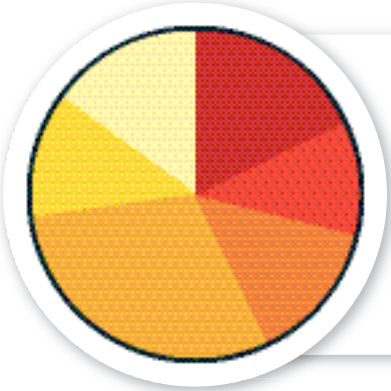


FIGURE G: AT WHAT STAGE OF RFID DEPLOYMENT IS YOUR COMPANY AT PRESENT?

We are using a production RFID system	18%
We are implementing a production RFID system	11%
We are running or planning to run an RFID pilot	14%
We are researching RFID solutions (no implementations yet)	30%
We have no plans to implement RFID technology	12%
Other, please specify	15%

FIGURE H: IF YOUR COMPANY IS CONSIDERING THE PURCHASE OF NEW OR ADDITIONAL RFID PRODUCTS OR SERVICES, WHAT IS THE TIMEFRAME?

Within the next year	43%
Within 2 years	16%
Within 5 years	5%
Eventually, but not in the foreseeable future	13%
We have no plan to purchase RFID products or services	14%
Other (please specify)	10%



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MARKETING TACTIC ANALYSIS

In an era in which fictional characters from TV commercials have their own Facebook pages, cell phones are becoming personal portable billboards that receive advertisements and coupons, and people use Twitter to acquire knowledge 140 characters at a time, substantive, written content remains king with the RFID audience. Analyst/research reports, white papers and case studies were the only information resources used by at least 75 percent of respondents during the past year (see Figure 2), and are the most likely resources to be utilized in 2011 (Figure 3). The next-most popular resource was webinars, which are also an excellent platform for presenting detailed information.

The results in Figure 2 reinforce a fundamental of RFID marketing that was uncovered in previous RFID Marketing Strategies Report studies: The channel is a more active consumer of information and marketing collateral than end users. Each resource was utilized by the channel more than by end users.

The following tables present a high-level overview of respondent activity, intentions and preferences. Complete data for each question and topic is presented later to provide additional insight into the rankings and key differences among various audiences.

FIGURE 2: RFID INFORMATION RESOURCES ACCESSED OVER THE PAST 12 MONTHS

OVERALL RANK	ACTIVITY	TOTAL RESPONDENTS		END USERS		CHANNEL	
		YES	NO	YES	NO	YES	NO
1	READ OR DOWNLOADED AN ANALYST OR RESEARCH REPORT ON RFID	81%	19%	75%	25%	85%	15%
2	READ OR DOWNLOADED AN RFID VENDOR WHITE PAPER	80%	20%	77%	23%	85%	15%
3	READ OR DOWNLOADED AN RFID VENDOR CASE STUDY	78%	22%	71%	29%	80%	20%
4	ATTENDED AN RFID WEBINAR	52%	48%	46%	54%	51%	49%
5	RESPONDED TO AN ONLINE RFID ADVERTISEMENT	49%	51%	45%	55%	53%	47%
6	USED SOCIAL MEDIA (SUCH AS LINKEDIN, FACEBOOK, TWITTER) TO LEARN ABOUT RFID	42%	58%	36%	64%	39%	61%
7	SOUGHT RFID INFORMATION AND COMPANIES AT A VERTICAL OR INDUSTRY-FOCUSED TRADE SHOW	40%	60%	35%	65%	42%	58%
8	ATTENDED AN RFID-FOCUSED TRADE SHOW	39%	61%	35%	65%	42%	58%
9	RESPONDED TO AN RFID PRINT ADVERTISEMENT	32%	68%	29%	71%	37%	63%

Interestingly, while Figure 2 shows that 42 percent of respondents used social media to learn about RFID in the past year, only 38 percent said they are likely to do so in 2011, as shown in Figure 3. This suggests social media use would decline within the RFID community at a time when it is exploding elsewhere. Respondents may understate their use of social media and underrate its importance, much as they do with advertising. For example, in every RFID Marketing Strategies Report study, respondents reported that advertising is one of the least influential tactics, and one they will utilize the least—and this year was no exception. However, as Figure 2 shows, online advertising ranks right in the middle of information resources that were accessed in the last year. While only 22 percent of respondents report that they are very likely to respond to an online ad this year, more than twice as many (49 percent) did so last year. Social media is not fully accepted as an information source and workplace tool, so respondents may be reluctant to report that they plan to use it.

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FIGURE 3: PLANNED RESOURCE UTILIZATION OVER THE NEXT 12 MONTHS

OVERALL RANK	ACTIVITY	RESPONSE AVERAGE
1	READ OR DOWNLOAD AN RFID VENDOR CASE STUDY	3.21
2	READ OR DOWNLOAD AN ANALYST OR RESEARCH REPORT ON RFID	3.17
3	READ OR DOWNLOAD AN RFID VENDOR WHITE PAPER	3.16
4	ATTEND AN RFID VENDOR WEBINAR	2.61
5	ATTEND AN RFID-FOCUSED TRADE SHOW	2.39
6	SEEK RFID INFORMATION AND COMPANIES AT A VERTICAL OR INDUSTRY-FOCUSED TRADE SHOW	2.38
7	RESPOND TO AN ONLINE RFID ADVERTISEMENT	2.20
8	RESPOND TO AN RFID PRINT ADVERTISEMENT	2.07
9	USE SOCIAL MEDIA (SUCH AS LINKEDIN, FACEBOOK, TWITTER) TO LEARN ABOUT RFID	1.95

The data presented above clearly shows the type of resources that the RFID audience prefers, and the information that follows indicates that the preferred providers of these resources is equally clear. RFID-focused solution providers and media outlets are more important than general IT or vertical industry-oriented sources, as reflected in the rankings in Figure 4. RFID company sources are seen as most important, followed by RFID trade magazines, industry associations, Web sites, blogs, newsletters and trade shows. Note that personal sources—professionals at RFID companies, plus RFID consultants and integrators—are considered more important than content-oriented sources, such as media and Web sites.

FIGURE 4: IMPORTANCE OF SOURCES FOR LEARNING ABOUT RFID TECHNOLOGY

RANK	SOURCE	RESPONSE AVERAGE
1	RFID HARDWARE OR SOFTWARE VENDORS	3.17
2	CONSULTANTS, INTEGRATORS, RESELLERS AND OTHER RFID VENDOR CHANNEL PARTNERS	2.96
3	TRADE MAGAZINES FOCUSED ON RFID	2.93
4	RFID INDUSTRY TRADE ASSOCIATIONS	2.87
5	WEB SITES, BLOGS AND NEWSLETTERS FOCUSED ON RFID	2.82
6	RFID TRADE SHOWS	2.78
7	RESEARCH AND ANALYST FIRMS	2.68
8	TRADE MAGAZINES FOCUSED ON VERTICAL INDUSTRIES OR IT	2.52
9	WEB SITES, BLOGS AND NEWSLETTERS FOCUSED ON VERTICAL INDUSTRIES OR IT	2.48
10	VERTICAL INDUSTRY TRADE ASSOCIATIONS	2.36
11	SOCIAL-MEDIA OUTLETS	1.75

Preferences shift a bit when it comes to the importance of sources for learning about RFID companies, rather than RFID technology. This is where content becomes critical. Respondents said they consider a company's Web site—not independent, third-party sources—the most important source of information about a firm, followed by the company's customer profiles, as well as content under the firm's control. White papers, another form of vendor-controlled content, ranked fourth. Personal sources and face-to-face contact remain very important; the common bond among the least-important sources is that no direct contact is involved.

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FIGURE 5: IMPORTANCE OF SOURCES FOR LEARNING ABOUT RFID COMPANIES

RANK	SOURCE	RESPONSE AVERAGE	RANK	SOURCE	RESPONSE AVERAGE
1	ITS WEB SITE	3.02	7	ITS EXHIBITS AT RFID EVENTS	2.79
2	ITS CASE STUDIES AND CUSTOMER PROFILES	3.00	8	ITS WEBINARS AND WEBINAR SPONSORSHIPS	2.72
3	CONSULTANTS AND SYSTEMS INTEGRATORS	2.98	9	ITS NEWSLETTERS	2.55
4	ITS WHITE PAPERS	2.93	10	ITS ONLINE PROMOTIONS	2.40
5	WORD-OF-MOUTH	2.90	11	ITS PRINT PROMOTIONS	2.11
T6	ITS DIRECT-SALES EFFORTS	2.82	12	ITS BLOGS	1.75
T6	ITS TRAINING AND WORKSHOPS	2.82	13	ITS ONLINE COMMUNITIES	1.71

The following sections examine attitudes about specific sources and marketing tactics in greater depth. They include detailed information regarding end-user preferences, and highlight key differences between end users and the channel.

CONTENT MARKETING

The importance of white papers, case studies and webinars relative to other forms of marketing communications indicates that content marketing is an advantageous strategy for RFID companies. While much of marketing communication is trending to short pieces that can be communicated in various forms of online posts, long-form collateral is preferred by the RFID audience. Recall that analyst reports, white papers and case studies were the most-used resources in 2010, and that they are also the most likely to be utilized in 2011. Case studies and white papers are among the most important resources people seek to learn about RFID companies. These sources are appropriate for RFID companies that are marketing to develop the channel, as well as for marketing efforts directed at end users, as shown by the following overall and demographic breakout results.

CASE STUDIES

While RFID use continues to grow, it remains far from a mainstream technology. Many end users and prospective end users have had limited exposure to RFID, and have consistently expressed skepticism about RFID capabilities and vendor claims. Over the years, they have also consistently ranked case studies among the very most important sources of information, and as the most likely resource to be used. The appeal of seeing how a perceived emerging, unproven technology has been successfully put into place by real-world companies is undeniably reassuring. The strong value of case studies is further reinforced by the strong importance that the RFID audience attaches to a vendor's references and experiences, which will be discussed in more detail in the Messaging and Content Analysis section. For example, 45 percent of respondents say the number of systems the vendor has implemented at companies like their own is a "strong influence" on how they perceive the vendor—the highest "strong influence" response in the study, in fact. Case studies are the ideal medium for communicating this influential experience to prospects.

Overall, case studies were rated the second-most important source of information about RFID companies, just behind a company's Web site; case studies were deemed "very important" to more respondents than any other resource. Case studies are one of only three marketing resources measured that are very likely to be used by at least half of respondents in the coming year. Despite the fact that channel professionals are presumably more experienced with RFID and more familiar with vendors than

are end users, case studies are actuallly more important to the channel, which is more likely to seek out case studies to read.

FIGURE 6: LIKELIHOOD TO READ OR DOWNLOAD CASE STUDIES

	VERY LIKELY	LIKELY	SOMEWHAT LIKELY	NOT VERY LIKELY	UNLIKELY	RESPONSE AVERAGE
TOTAL RESPONDENTS	53%	24%	16%	5%	2%	3.21
END USERS	43%	28%	21%	4%	4%	3.02
CHANNEL	58%	26%	10%	4%	2%	3.34

FIGURE 7: IMPORTANCE OF CASE STUDIES FOR LEARNING ABOUT RFID COMPANIES

	VERY IMPORTANT	IMPORTANT	SOMEWHAT IMPORTANT	NOT VERY IMPORTANT	UNIMPORTANT	RESPONSE AVERAGE
TOTAL RESPONDENTS	36%	38%	19%	4%	2%	3.00
END USERS	29%	39%	23%	6%	3%	2.85
CHANNEL	42%	36%	15%	5%	2%	3.11

WHITE PAPERS

Only 6 percent of respondents said they are unlikely to read or download an RFID white paper over the next year, which means RFID companies have a willing audience for presenting in-depth information about a technology, application or business case. White papers are the third-most likely source to be used, and are considered the fourth-most important source of information about RFID companies. The utilization rates for white papers and analyst reports are nearly identical, but white papers have the advantage of giving vendors complete control over content.

FIGURE 8: LIKELIHOOD TO READ OR DOWNLOAD WHITE PAPERS

	VERY LIKELY	LIKELY	SOMEWHAT LIKELY	NOT VERY LIKELY	UNLIKELY	RESPONSE AVERAGE
TOTAL RESPONDENTS	51%	25%	17%	3%	3%	3.16
END USERS	42%	28%	21%	5%	4%	2.99
CHANNEL	57%	24%	15%	2%	2%	3.32

FIGURE 9: IMPORTANCE OF WHITE PAPERS FOR LEARNING ABOUT RFID COMPANIES

	VERY IMPORTANT	IMPORTANT	SOMEWHAT IMPORTANT	NOT VERY IMPORTANT	UNIMPORTANT	RESPONSE AVERAGE
TOTAL RESPONDENTS	29%	41%	24%	6%	0%	2.93
END USERS	22%	42%	28%	7%	1%	3.05
CHANNEL	34%	44%	19%	3%	1%	3.09

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ANALYST AND RESEARCH REPORTS

Analyst and research reports were the most-used source of RFID information in 2010; 81 percent of respondents reported that they read or downloaded such reports. More than three quarters of respondents plan to use analyst reports again this year, indicating that these sources remain very important. Couple these utilization rates with the data in Figure 1 (in the Introduction) that shows consultants, analysts and other professional sources are the most influential sources of information about RFID companies, and the importance of being favorably featured in analyst reports becomes very clear.

FIGURE 10: LIKELIHOOD TO READ OR DOWNLOAD ANALYST OR RESEARCH REPORTS ABOUT RFID

	VERY LIKELY	LIKELY	SOMEWHAT LIKELY	NOT VERY LIKELY	UNLIKELY	RESPONSE AVERAGE
TOTAL RESPONDENTS	50%	26%	18%	3%	2%	3.17
END USERS	41%	29%	22%	4%	4%	2.99
CHANNEL	52%	32%	9%	5%	3%	3.27

As Figure 11 shows, approximately a fifth of respondents indicated they are strongly influenced by how often a company is mentioned in market research reports, while 91 percent are at least somewhat influenced. This influence is much stronger than the number of times that a company is written about in media outlets. RFID firms should consider the analyst/reserach community an important primary audience, and should regularly reach out to these professionals with targetted communication.

FIGURE 11: INFLUENCE OF MARKET RESEARCH REPORT MENTIONS ON HOW AN RFID COMPANY IS PERCEIVED

	VERY INFLUENTIAL	INFLUENTIAL	SOMEWHAT INFLUENTIAL	NOT VERY INFLUENTIAL	NO INFLUENCE	RESPONSE AVERAGE
TOTAL RESPONDENTS	21%	44%	26%	8%	2%	2.76
END USERS	16%	44%	29%	9%	2%	2.63
CHANNEL	23%	40%	31%	5%	2%	2.79

WEBINARS

About half of the respondents (52 percent) had attended an RFID vendor webinar within the past year, and nearly the same amount (51 percent) said they are likely to do so in the coming year, though a fifth of end users are unlikely to attend a webinar. In 2009, 33 percent of end users reported they were unlikely to attend a webinar, so as previously predicted, the medium has gained acceptance. Webinars are one of only four resources that at least half of respondents plan to use in the next year.

FIGURE 12: LIKELIHOOD TO ATTEND AN RFID VENDOR WEBINAR

	VERY LIKELY	LIKELY	SOMEWHAT LIKELY	NOT VERY LIKELY	UNLIKELY	RESPONSE AVERAGE
TOTAL RESPONDENTS	36%	15%	32%	8%	8%	2.61
END USERS	26%	17%	37%	8%	12%	2.37
CHANNEL	39%	15%	31%	11%	5%	2.74

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As with white papers, webinars are an excellent medium for presenting in-depth content that is completely controlled by the vendor, and that is independent of being picked up by the press, or being developed by analysts. Webinars are also an excellent medium for sharing and leveraging case studies, and for providing product information or training, which could help explain their popularity with the channel.

While 43 percent of end uers plan to attend an RFID vendor webinar, even more—60 percent—said the events are important sources of information about specific RFID companies, and 88 percent indicated they are at least somewhat imporant. Webinars were rated as slightly less important than trade show exhibits for learning about RFID companies, but were ahead of newsletters and various electronic media communications.

FIGURE 13: IMPORTANCE OF WEBINARS AND WEBINAR SPONSORSHIPS FOR LEARNING ABOUT RFID COMPANIES

	VERY IMPORTANT	IMPORTANT	SOMEWHAT IMPORTANT	NOT VERY IMPORTANT	UNIMPORTANT	RESPONSE AVERAGE
TOTAL RESPONDENTS	29%	41%	24%	6%	0%	2.93
END USERS	22%	42%	28%	7%	1%	3.05
CHANNEL	34%	44%	19%	3%	1%	3.09

EVENTS

Webinars fall in the gray area between content marketing and event marketing, and, as noted, are also on the dividing line of resources likely to be used by the majority of respondents. RFID trade shows fall below this threshold, but are the next-most likely resource that respondents will use in 2011, as 45 percent indicated they are likely to attend an RFID event, while only 10 percent have ruled it out.

Figure 14, below, summarizes the results for all event-related questions. Because the table shows results from questions that measured importance and influence for various categories, how the response ranked within its specific category is presented in the last column for easy reference. The table shows that company workshops and training programs have the most impact, which is another example of the RFID audience's acceptance of in-depth content. Note that company-specific training and workshops (rated "very important" by 30 percent of respondents) has more of an impact than having company speakers at trade shows (considered "very influential" by 9 percent of respondents).

FIGURE 14: RESPONSE AVERAGE COMPARISON FOR EVENT-RELATED QUESTIONS (IN DESCENDING ORDER OF IMPORTANCE OR INFLUENCE)

TOPIC	RESPONSE AVERAGE
IMPORTANCE OF ITS TRAINING AND WORKSHOPS FOR LEARNING ABOUT AN RFID COMPANY	2.82
IMPORTANCE OF ITS EXHIBITS AT RFID EVENTS FOR LEARNING ABOUT AN RFID COMPANY	2.79
IMPORTANCE OF RFID TRADE SHOWS FOR LEARNING ABOUT RFID TECHNOLOGY	2.78
IMPORTANCE OF ITS WEBINARS AND WEBINAR SPONSORSHIPS FOR LEARNING ABOUT AN RFID COMPANY	2.72
LIKELIHOOD TO ATTEND AN RFID VENDOR WEBINAR	2.61
LIKELIHOOD TO ATTEND AN RFID-FOCUSED TRADE SHOW	2.39
LIKELIHOOD TO SEEK RFID INFORMATION AND COMPANIES AT A VERTICAL OR INDUSTRY-FOCUSED TRADE SHOW	2.38
HOW TRADE SHOW PRESENCE INFLUENCES PERCEPTIONS OF RFID COMPANIES	2.16
HOW HAVING TRADE SHOW SPEAKERS INFLUENCES PERCEPTIONS OF RFID COMPANIES	2.13

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TRADE SHOWS

As Figure 15 shows, respondents consider trade shows to be important for learning about RFID technology and RFID companies. While 28 percent of all respondents said that trade shows are "very important" for learning about RFID companies, only about a third as many indicated shows to be "very influential" in terms of how RFID companies are perceived. Figure 16, below, shows how trade show-related activity influences respondents regarding RFID companies.

FIGURE 15: TRADE SHOW IMPORTANCE

	VERY IMPORTANT	IMPORTANT	SOMEWHAT IMPORTANT	NOT VERY IMPORTANT	UNIMPORTANT	RESPONSE AVERAGE
IMPORTANCE OF RFID EVENT EXHIBITS FOR LEARNING ABOUT RFID COMPANIES						
TOTAL RESPONDENTS	28%	36%	26%	7%	3%	2.79
END USERS	21%	39%	27%	8%	5%	2.63
CHANNEL	36%	28%	15%	5%	2%	2.63
PROFESSIONAL SOURCES (CONSULTANTS, ANALYSTS, SYSTEMS INTEGRATORS)						
TOTAL RESPONDENTS	29%	34%	26%	8%	3%	2.78
END USERS	23%	36%	27%	9%	5%	2.63
CHANNEL	34%	28%	27%	8%	4%	2.79

FIGURE 16: TRADE SHOW INFLUENCE ON HOW COMPANIES ARE PERCEIVED

	VERY INFLUENTIAL	INFLUENTIAL	SOMEWHAT INFLUENTIAL	NOT VERY INFLUENTIAL	NO INFLUENCE	RESPONSE AVERAGE
HOW MUCH OF A PRESENCE THE COMPANY MAINTAINS AT A TRADE SHOW						
TOTAL RESPONDENTS	8%	29%	40%	17%	6%	2.16
END USERS	7%	24%	44%	18%	6%	2.33
CHANNEL	6%	31%	41%	15%	7%	2.14
WHETHER THE COMPANY HAS SPEAKERS AT TRADE SHOWS						
TOTAL RESPONDENTS	9%	29%	35%	20%	6%	2.13
END USERS	6%	27%	36%	23%	8%	2.00
CHANNEL	10%	31%	37%	16%	6%	2.23

Consistent with other results, respondents showed a preference (albeit slight) for RFID-oriented trade shows, compared to events focused on vertical industries (such as NRF, ProMat and HIMSS). Figure 17, below, shows the likelihood of respondents to attend RFID and vertical-industry events.

FIGURE 17: TRADE SHOW ATTENDANCE PLANS

	LIKELIHOOD TO ATTEND AN RFID-FOCUSED TRADE SHOW	LIKELIHOOD TO SEEK RFID INFORMATION AND COMPANIES AT A VERTICAL INDUSTRY-FOCUSED TRADE SHOW
VERY LIKELY	27%	24%
LIKELY	18%	22%
POSSIBLE	33%	32%
UNLIKELY	11%	12%
HIGHLY UNLIKELY	10%	10%
RESPONSE AVERAGE	2.39	2.38

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ONLINE MARKETING

The survey reveals that the RFID audience has traditional tastes when it comes to online marketing sources—an RFID company's Web site is rated as its most important source, while its online communities are rated the least. Newsletters are rated ahead of newer, more interactive mediums, such as blogs, LinkedIn discussion groups and Facebook pages. Respondents said they are eager to download white papers, case studies and other information from the Web, and many are willing to sit in on webinars or travel to conferences in order to learn about RFID technology and companies—but most do not plan to get involved in RFID discussion groups or other online communities. RFID-oriented Web sites and newsletters are well-accepted sources of information, but RFID vendor blogs are not. These contradictions make effective online marketing challenging, heightened by the many sources competing to attract an online audience.

COMPANY WEB SITES

With more information and communication options available than ever before, the traditional company Web site has reclaimed its position as the most important source of information about an RFID firm. A company's Web site was rated as the most important source of information regarding specific RFID companies in the original Marketing Strategies Report in 2006, but fell to third in 2009, behind word of mouth and a company's case studies or customer profiles. Figures 18, 19 and 20 show the relative importance of various Web-related sources of information about specific RFID companies, while Figure 21 illustrates how a company's online communities influence how people perceive that business.

FIGURE 18: IMPORTANCE OF A COMPANY'S WEB SITE FOR LEARNING ABOUT THAT BUSINESS

	VERY IMPORTANT	IMPORTANT	SOMEWHAT IMPORTANT	NOT VERY IMPORTANT	UNIMPORTANT	RESPONSE AVERAGE
TOTAL RESPONDENTS	34%	39%	22%	5%	1%	3.02
END USERS	27%	40%	23%	8%	1%	2.82
CHANNEL	39%	34%	21%	5%	1%	3.05

FIGURE 19: IMPORTANCE OF A COMPANY'S BLOGS FOR LEARNING ABOUT THAT BUSINESS

	VERY IMPORTANT	IMPORTANT	SOMEWHAT IMPORTANT	NOT VERY IMPORTANT	UNIMPORTANT	RESPONSE AVERAGE
TOTAL RESPONDENTS	10%	27%	32%	20%	11%	1.75
END USERS	7%	24%	34%	23%	13%	1.91
CHANNEL	10%	28%	37%	16%	9%	2.14

FIGURE 20: IMPORTANCE OF A COMPANY'S ONLINE COMMUNITIES FOR LEARNING ABOUT THAT BUSINESS

	VERY IMPORTANT	IMPORTANT	SOMEWHAT IMPORTANT	NOT VERY IMPORTANT	UNIMPORTANT	RESPONSE AVERAGE
TOTAL RESPONDENTS	8%	20%	28%	23%	21%	1.71
END USERS	7%	15%	29%	25%	25%	1.53
CHANNEL	8%	20%	28%	23%	21%	1.71

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FIGURE 21: ONLINE COMMUNITY PARTICIPATION INFLUENCE ON COMPANY PERCEPTIONS

	VERY INFLUENTIAL	INFLUENTIAL	SOMEWHAT INFLUENTIAL	NOT VERY INFLUENTIAL	NO INFLUENCE	RESPONSE AVERAGE
TOTAL RESPONDENTS	10%	26%	33%	19%	12%	2.03
END USERS	7%	25%	37%	17%	13%	1.94
CHANNEL	15%	25%	28%	19%	14%	2.10

As noted, the overall Web site was rated the most important information source about a company, but the firm's online communities—which are likely part of its site—were rated last. A quarter of end users do not consider online communities an important source of information, compared to just 1 percent who said a company's Web site is unimportant. The lowest-rated source for learning about an RFID company was its online communities, and its participation in online communities (including those other than its own) ranked 18th out of 20 response options for what influences how RFID companies are perceived. Figure 22, below, provides a summary comparison of how respondents rated the importance of company Web sites, blogs and online communities for learning about RFID firms. It highlights the disparities among what respondents consider very important and unimportant.

FIGURE 22: RATINGS SUMMARY FOR COMPANY WEB COMMUNICATION SOURCES

	COMPANY WEB SITES	COMPANY BLOGS	COMPANY ONLINE COMMUNITIES
VERY IMPORTANT	34%	10%	8%
IMPORTANT	39%	27%	20%
SOMEWHAT IMPORTANT	22%	32%	28%
NOT VERY IMPORTANT	5%	20%	23%
UNIMPORTANT	1%	11%	21%
RESPONSE AVERAGE	**3.02**	**1.75**	**1.71**

NEWSLETTERS

Newsletters are analyzed as an online marketing medium, because most are now delivered by e-mail. Company newsletters are at least somewhat important to 89 percent of respondents. However, newsletters are not one of the more important sources of information about RFID companies, ranking 10th out of 14 sources measured, behind company Web sites and ahead of blogs and online communities. Emerging media, such as Twitter and RSS feeds, share some important characteristics with company newsletters, so it will be interesting to track whether these resources become more important as they become more familiar to prospective followers.

FIGURE 23: IMPORTANCE OF COMPANY NEWSLETTERS FOR LEARNING ABOUT RFID COMPANIES

	VERY IMPORTANT	IMPORTANT	SOMEWHAT IMPORTANT	NOT VERY IMPORTANT	UNIMPORTANT	RESPONSE AVERAGE
TOTAL RESPONDENTS	19%	36%	35%	9%	2%	2.55
END USERS	15%	34%	39%	10%	3%	2.50
CHANNEL	19%	35%	35%	9%	2%	2.52

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Independent newsletters, along with blogs and Web sites, are considered more important for learning about RFID technology than company-sponsored newsletters and blogs are for learning about RFID companies. For example, 29 percent of respondents indicated that RFID-oriented newsletters, Web sites and blogs were "very important" for learning about RFID technology, compared to 19 percent who said a company's newsletters were "very important" for learning about that business. The RFID audience is clearly willing to seek information from vendors and independent sources alike. Figure 24 shows the importance that respondents attach to RFID-focused newsletters, Web sites and blogs, and those that cover a specific vertical market or the IT industry. Again, the preference for RFID-focused sources is clear.

FIGURE 24: IMPORTANCE OF NEWSLETTERS, BLOGS AND WEB SITES FOR LEARNING ABOUT RFID TECHNOLOGY

	RFID-FOCUSED WEB SITES, BLOGS AND NEWSLETTERS	VERTICAL INDUSTRY OR IT-FOCUSED WEB SITES, BLOGS AND NEWSLETTERS
VERY IMPORTANT	29%	17%
IMPORTANT	35%	33%
SOMEWHAT IMPORTANT	27%	34%
NOT VERY IMPORTANT	7%	13%
UNIMPORTANT	2%	2%
RESPONSE AVERAGE	**2.82**	**2.47**

SOCIAL MEDIA

Respondents sent mixed signals about the role and value of social media. Nearly a quarter of all respondents said they are highly unlikely to use social media in the coming year—a significantly higher rate than for any other resource measured. They rated social media the least important source of information for learning about both RFID technology and companies, one of the least influential sources of information about companies, and the least likely resource to be used. Despite these reservations, nearly two in five respondents indicated they are likely to use social media in the coming year, another 20 percent responded that it is a possibility, and online communities and other social media outlets were said to be at least somewhat important to more than half of respondents.

The low ratings attached to various forms of social media may reflect respondent opinions about the content available on social media, more than the medium itself. Respondents clearly accept and value online information sources—company Web sites are rated the most important sources of information about RFID firms, and RFID-oriented Web sites, blogs and newsletters are valued resources for learning about technology. Respondents also clearly favor substantive content, such as white papers and case studies. The content available on social-media outlets may not be highly valued because it fails to meet respondents' information preferences. Material in Tweets and online discussion forums is less authoritative and susbstantive than what is usually found in vendor white papers, case studies, analyst reports, news articles, case studies and features appearing on professional media-run Web sites and in electronic newsletters.

The low ratings for social media may also reflect its immaturity. When the first RFID Marketing Strategies Report research was conducted in 2006, Facebook was just two years old and hardly a household word, despite having 12 million users. LinkedIn, a more professional-oriented social networking site, had 5 million members. Today, LinkedIn has more than 40 million members, plus several RFID-oriented groups. Facebook is an even bigger success story, with more than 500 million members, including many business managers and executives who check updates from their smart phones. As these and other

social-media outlets continue to become more pervasive, and as RFID professionals gain more experience with social-media marketing, the importance and influence gaps with other mediums will likely narrow.

This evolution will not happen overnight, based on the expected usage data. The number of respondents who said they are likely to use social media to learn about RFID in the coming year was actually slightly less than those who reported using it last year, though 20 percent of respondents indicated they would "possibly" use social media over the next 12 months. Consistent with other information sources, the channel is more likely to use social media than end users.

FIGURE 25: SOCIAL MEDIA USE FOR LEARNING ABOUT RFID TECHNOLOGY

	USED SOCIAL MEDIA IN THE LAST YEAR	LIKELY TO USE SOCIAL MEDIA IN THE COMING YEAR
TOTAL RESPONDENTS	42%	38%
END USERS	36%	32%
CHANNEL	39%	39%

The 38 percent expected utilization rate ranks last among the nine activities measured, putting social media behind responses to advertising, attendance at trade shows, webinar participation and reading various written resources (see Figure 3 in the Marketing Tactic Analysis for the complete list). Social media is also the lowest-rated option for learning about RFID technology. As seen in Figure 26, 22 percent of respondents ranked social media as "not important"—no other topic had a "not important" rating above 3 percent.

FIGURE 26: IMPORTANCE OF SOCIAL MEDIA OUTLETS FOR LEARNING ABOUT RFID TECHNOLOGY

	VERY IMPORTANT	IMPORTANT	SOMEWHAT IMPORTANT	NOT VERY IMPORTANT	UNIMPORTANT	RESPONSE AVERAGE
TOTAL RESPONDENTS	10%	19%	29%	20%	22%	1.75
END USERS	8%	16%	25%	25%	25%	1.55
CHANNEL	11%	18%	3%	17%	22%	1.21

Similarly, 21 percent of respondents said online communities (such as Twitter feeds and online discussion groups) are not important sources of information for learning about RFID companies (see Figure 27). However, it is important to note that both social media and online communities are at least somewhat important to more than half of the respondents. Despite being one of the least influential factors in terms of how RFID providers are perceived, vendor participation in online communities is somewhat influential for 69 percent of respondents, including 10 percent who consider it a strong influence (as shown previously, in Figure 26).

FIGURE 27: IMPORTANCE OF ITS ONLINE COMMUNITIES FOR LEARNING ABOUT AN RFID COMPANY

	VERY IMPORTANT	IMPORTANT	SOMEWHAT IMPORTANT	NOT VERY IMPORTANT	UNIMPORTANT	RESPONSE AVERAGE
TOTAL RESPONDENTS	8%	20%	28%	23%	21%	1.71
END USERS	7%	15%	29%	25%	25%	1.53
CHANNEL	8%	20%	28%	23%	21%	1.71

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ADVERTISING AND PROMOTIONS

Social media has displaced advertising as the resource respondents say they are least likely to use, but advertising utilization data provides a good reminder that such comparisons are relative. For example, while print advertising had the lowest utilization rate in 2010, 32 percent of people did respond to a print ad during the year, and more are likely to do so this year. Print advertising continues to attract attention and generate inquiries, even though other inquiry and response mechanisms are used more often. How often a company advertises was the least-influential factor in terms of how a company is perceived, but more than half of the respondents said advertising frequency is at least somewhat influential. Advertising has notably more impact and influence on the channel than on end-user respondents, as do online promtions, as seen in the data presented below.

FIGURE 28: IMPORTANCE OF PROMOTIONS FOR LEARNING ABOUT AN RFID COMPANY

	VERY IMPORTANT	IMPORTANT	SOMEWHAT IMPORTANT	NOT VERY IMPORTANT	UNIMPORTANT	RESPONSE AVERAGE
ONLINE PROMOTIONS						
TOTAL RESPONDENTS	12%	37%	34%	13%	4%	2.40
END USERS	8%	39%	33%	14%	6%	2.29
CHANNEL	15%	37%	34%	13%	2%	2.52
PRINT PROMOTIONS						
TOTAL RESPONDENTS	7%	26%	43%	19%	5%	2.11
END USERS	5%	26%	44%	18%	7%	2.04
CHANNEL	6%	25%	42%	21%	6%	2.04

FIGURE 29: HOW ADVERTISING FREQUENCY INFLUENCES HOW RFID COMPANIES ARE PERCEIVED

	VERY INFLUENTIAL	INFLUENTIAL	SOMEWHAT INFLUENTIAL	NOT VERY INFLUENTIAL	NO INFLUENCE	RESPONSE AVERAGE
ONLINE ADVERTISING						
TOTAL RESPONDENTS	6%	20%	35%	28%	11%	1.82
END USERS	3%	17%	39%	27%	14%	1.68
CHANNEL	8%	23%	34%	25%	11%	1.94
PRINT ADVERTISING						
TOTAL RESPONDENTS	3%	12%	41%	31%	13%	1.61
END USERS	2%	10%	44%	29%	15%	1.55
CHANNEL	5%	12%	40%	30%	13%	1.86

The data does not indicate the full impact and importance of advertising, because it does not show the degree to which advertising drives visitors to a company's Web site, which is considered a much more important source of information and is also often a gateway to case studies and other valued resources. Similarly, it is difficult to measure the direct impact of public relations, described in the next section.

PUBLIC RELATIONS

Public relations, including media and analyst relations, plays an important role in how visible a company is to its audiences in all mediums—and how audiences perceive that company. The RFID consultants, integrators and other industry professionals, analyst firms and media outlets that shape opinions about

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RFID companies are all influenced by PR efforts. As such, the number of media mentions that a company receives is a poor and incomplete measure of its PR effectiveness.

That said, how often a company receives media coverage was said to be important to respondents. Only 12 percent of respondents indicated that how often the media covers a company is of little or no importance, down from 26 percent in 2009. Although media coverage is valuable, companies should not flood media outlets and distribution services with press releases in pursuit of coverage—the frequency with which businesses make announcements is one of the least influential factors measured.

FIGURE 30: HOW ANNOUNCEMENT AND MEDIA COVERAGE FREQUENCY INFLUENCE PERCEPTIONS OF RFID COMPANIES

	VERY INFLUENTIAL	INFLUENTIAL	SOMEWHAT INFLUENTIAL	NOT VERY INFLUENTIAL	NO INFLUENCE	RESPONSE AVERAGE
FREQUENCY OF MEDIA COVERAGE						
TOTAL RESPONDENTS	15%	40%	33%	9%	3%	2.49
END USERS	10%	38%	36%	12%	4%	2.38
CHANNEL	18%	38%	34%	8%	2%	2.58
FREQUENCY OF ANNOUNCEMENTS						
TOTAL RESPONDENTS	8%	28%	41%	19%	5%	2.17
END USERS	4%	24%	44%	20%	7%	1.96
CHANNEL	8%	34%	39%	18%	2%	2.30

MAGAZINES

While the scope of media relations has expanded to include independent bloggers, social networking site moderators, thought leaders who Tweet and other non-traditional media, magazines remain a good place for RFID companies to focus their media relations efforts. Magazines occupy an important role in the RFID industry. Outside of RFID companies, consultants and integrators, respondents said they consider magazines the most important source of information about RFID technology. The respondents also prefer to get their RFID information from magazines that cover the technology full-time, rather than from those focused on business operations or technology for a specific vertical industry. RFID- and industry-focused print magazines were each rated ahead of online newsletters and other media outlets within their fields.

FIGURE 31: IMPORTANCE OF MAGAZINES FOR LEARNING ABOUT RFID TECHNOLOGY

	RFID-FOCUSED TRADE MAGAZINES	IT- OR VERTICAL INDUSTRY-FOCUSED TRADE MAGAZINES
VERY IMPORTANT	31%	17%
IMPORTANT	40%	36%
SOMEWHAT IMPORTANT	22%	32%
NOT VERY IMPORTANT	5%	12%
UNIMPORTANT	1%	2%
RESPONSE AVERAGE	2.93	2.52

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ANALYST AND RESEARCH REPORTS

How often a company is discussed in analyst and research reports is more influential than how often it is written about in general, which is consistent with the fact that analysts overall are more influential than the media. Note that 21 percent of respondents said that analysts have a strong influence, compared to just 2 percent who replied that they have no influence. Respondents indicated they plan to use analyst/research reports more than all other information sources except case studies, making a positive portrayal in these reports even more important.

FIGURE 32: HOW COVERAGE IN ANALYST AND RESEARCH REPORTS INFLUENCES PERCEPTIONS OF RFID COMPANIES

	VERY INFLUENTIAL	INFLUENTIAL	SOMEWHAT INFLUENTIAL	NOT VERY INFLUENTIAL	NO INFLUENCE	RESPONSE AVERAGE
TOTAL RESPONDENTS	21%	44%	26%	8%	2%	2.76
END USERS	16%	44%	29%	9%	2%	2.63
CHANNEL	23%	40%	31%	5%	2%	2.79

While research and analyst firms are very influential in shaping respondent opinions of RFID companies, they are not as highly valued for learning about RFID technology. Industry analysts and research companies were rated the seventh-most important source of RFID technology information, behind RFID industry professionals, associations and media, and at about the same level as vertical and IT industry trade publications.

FIGURE 33: IMPORTANCE OF ANALYST AND RESEARCH FIRMS FOR LEARNING ABOUT RFID TECHNOLOGY

	VERY IMPORTANT	IMPORTANT	SOMEWHAT IMPORTANT	NOT VERY IMPORTANT	UNIMPORTANT	RESPONSE AVERAGE
TOTAL RESPONDENTS	23%	36%	29%	10%	3%	2.68
END USERS	16%	37%	32%	12%	3%	2.51
CHANNEL	24%	36%	27%	9%	4%	2.79

BRAND AND REPUTATION

Public relations also plays a large, difficult-to-measure role in the strengths of a company's brand and reputation. For example, "word of mouth" is one of the most important sources of information about RFID companies—it was ranked fifth for 2011, ahead of a firm's own direct-sales efforts, and was the top-ranked information source in the 2009 study. Public-relations efforts undeniably impact a company's word of mouth. It is no coincidence that nearly all of the top 10 most recognized RFID firm have extensive PR activities. Brand is persistently an important factor in RFID purchasing decisions, so it is not surprising that the most-recognized RFID brands are also among the sales and market-share leaders. A complete analysis of RFID brand importance and leadership is presented in the the "2011 RFID Brand Report," a companion publication included with the "2011 RFID Marketing Strategies Report."

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FIGURE 34: IMPORTANCE OF WORD OF MOUTH FOR LEARNING ABOUT RFID COMPANIES

	VERY IMPORTANT	IMPORTANT	SOMEWHAT IMPORTANT	NOT VERY IMPORTANT	UNIMPORTANT	RESPONSE AVERAGE
TOTAL RESPONDENTS	33%	36%	21%	8%	1%	2.90
END USERS	34%	32%	21%	11%	2%	3.15
CHANNEL	39%	33%	20%	6%	2%	3.01

FIGURE 35: BRAND INFLUENCE ON RFID PURCHASING DECISIONS

	VERY IMPORTANT	SOMEWHAT IMPORTANT	NOT VERY IMPORTANT	NOT IMPORTANT	RESPONSE AVERAGE*
TOTAL RESPONDENTS	33%	51%	14%	3%	2.15
END USERS	28%	59%	12%	2%	2.04
CHANNEL	31%	53%	13%	4%	3.01

* This question used a four-point scale, so the response average is lower than for most questions, which used a five-point scale.

TACTICAL ANALYSIS CONCLUSION

The RFID community supports many sources of content, but has clear favorites. Respondents prefer RFID information to come from the RFID industry: RFID vendors are the most important sources of information about the technology; consultants and integrators are the most important/influential sources of information about RFID vendors; and RFID-focused trade associations, media outlets and events are clearly more influential than equivalent resources oriented to specific vertical industries or general IT. Other key takeaways from the analysis of RFID information sources and marketing tactics include:

- The audience remains highly receptive to substantive forms of content, such as analyst reports, white papers and case studies.
- Social media is not currently considered highly important or influential, but past history suggests opinions could change quickly.
- Even though respondents make use of many independent information sources, an RFID vendor's Web site is considered the most important source of information about the company.
- Respondents value a company's Web site much more highly that its online social-networking activity.

MESSAGING AND CONTENT ANALYSIS

RFID companies are innovative by nature. Many sales opportunities require them to convince prospects to use RFID in a business process in which it hasn't been used before. Innovative product development has paved the way for many of the highly effective solutions in place today. Meanwhile, innovative and effective marketing also paved the way for industry growth, by educating prospective end users about RFID technology and its benefits. With an audience still very eager for information, and the evolving field of social media providing numerous opportunities to innovate, it is important for RFID marketers not to lose sight of what is important to their audience. The marketing medium is not the message. Delivering content and messaging that resonates will help companies build and sustain an audience, and can make campaigns effective—even when respondents' least-favored tactics and mediums are used.

The research shows clear divisions as to what influences how RFID companies are perceived, and what does not. Many themes and topics that have historically been powerful remain so. However, there is no formula for creating effective messaging, because each company must communicate what makes it unique and valuable. Fortunately, the data provides guidance that RFID companies can use to help frame their own unique message.

FIGURE 36: WHAT INFLUENCES POSITIVE PERCEPTIONS OF RFID COMPANIES?

RANK	INFLUENCE	RESPONSE AVERAGE
1	IF THE COMPANY OFFERS STANDARDS-COMPLIANT PRODUCTS	3.15
2	HOW LONG THE COMPANY HAS BEEN INVOLVED WITH RFID	3.12
3	IF THE COMPANY HAS IMPLEMENTED AN RFID SOLUTION AT A FIRM LIKE YOUR OWN	3.12
4	THE NUMBER OF RFID SYSTEMS THE COMPANY HAS IMPLEMENTED	3.07
5	WHETHER THE COMPANY HAS BEEN REFERRED BY A COLLEAGUE	3.06
6	THE COMPANY'S TECHNOLOGY AND/OR INTEGRATION PARTNERS	2.96
7	HOW ACTIVE THE COMPANY IS IN STANDARDS DEVELOPMENT	2.88
8	HOW OFTEN THE COMPANY IS DISCUSSED IN MARKET-RESEARCH REPORTS	2.76
9	IF THE COMPANY IS SOLELY FOCUSED ON RFID	2.71
10	PATENTS HELD OR INTELLECTUAL PROPERTY POSITION	2.62
11	HOW SENSITIVE THE COMPANY IS TO RFID PRIVACY CONCERNS	2.58
12	HOW OFTEN THE COMPANY IS WRITTEN ABOUT	2.49
13	THE NUMBER OF PARTNERSHIPS THE COMPANY HAS	2.46
14	HOW OFTEN THE COMPANY MAKES ANNOUNCEMENTS	2.17
15	HOW MUCH OF A PRESENCE THE COMPANY MAINTAINS AT A TRADE SHOW	2.16
16	IF THE COMPANY HAS SPEAKERS AT TRADE SHOWS	2.13
17	COMPANY SIZE	2.09
18	THE COMPANY'S PARTICIPATION IN ONLINE COMMUNITIES	2.03
19	HOW OFTEN THE COMPANY ADVERTISES ONLINE	1.82
20	HOW OFTEN THE COMPANY ADVERTISES IN PRINT	1.61

STANDARDS

Over the years, many RFID marketing and advertising messages have tried to convince prospects that the vendor had built a better mousetrap. It appears vendors will be well served by making it clear they build standard mousetraps. A standardized product offering was the most important factor for companies to earn a positive perception among respondents, with high ratings from the channel and end users alike.

FIGURE 37: HOW HAVING STANDARDS-COMPLIANT PRODUCTS INFLUENCES COMPANY PERCEPTION

	VERY INFLUENTIAL	INFLUENTIAL	SOMEWHAT INFLUENTIAL	NOT VERY INFLUENTIAL	NO INFLUENCE	RESPONSE AVERAGE
TOTAL RESPONDENTS	42%	37%	16%	4%	1%	3.15
END USERS	39%	39%	16%	5%	2%	3.10
CHANNEL	45%	35%	18%	1%	2%	3.22

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Companies do not necessarily need to be involved in setting standards to win respondents' confidence—they simply have to conform to them. How active a company is in standards development had above-average influence, but far below the level of having standardized products. Standards involvement has never been a major opinion driver, even when standards issues were at the forefront of industry activity. Previous studies found that company membership in standards-setting industry associations, such as AIM or EPCglobal, had little influence on company perceptions, so these questions were dropped from the 2011 study. RFID industry associations are considered an important source of information about RFID technology, however, so by getting involved in associations, vendors can gain valuable exposure to prospects.

FIGURE 38: HOW INVOLVEMENT IN STANDARDS DEVELOPMENT INFLUENCES COMPANY PERCEPTION

	VERY INFLUENTIAL	INFLUENTIAL	SOMEWHAT INFLUENTIAL	NOT VERY INFLUENTIAL	NO INFLUENCE	RESPONSE AVERAGE
TOTAL RESPONDENTS	30%	34%	25%	10%	2%	2.88
END USERS	27%	36%	25%	10%	3%	2.76
CHANNEL	32%	32%	29%	7%	2%	2.89

An RFID vendor's own intellectual property is less important to respondents than whether the vendor adheres to industry standards. For example, an RFID company's patents and IP are a strong influence on 24 percent of respondents (including 19 percent of end users), while having standards-compliant products is a strong influence on 42 percent. Fifteen percent of respondents reported that IP has little or no influence on how they perceive an RFID company, which is three times more than those not influenced by vendors having standardized products.

FIGURE 39: HOW PATENTS HELD OR IP POSITION INFLUENCES COMPANY PERCEPTION

	VERY INFLUENTIAL	INFLUENTIAL	SOMEWHAT INFLUENTIAL	NOT VERY INFLUENTIAL	NO INFLUENCE	RESPONSE AVERAGE
TOTAL RESPONDENTS	24%	33%	28%	11%	4%	2.62
END USERS	19%	32%	29%	14%	6%	2.46
CHANNEL	28%	32%	28%	10%	3%	2.74

EXPERIENCE

An RFID company's experience has always been a very powerful influence on how the company has been perceived, and remains so, even as the RFID user base and channel has gained more experience with the technology. Respondents to the "2011 RFID Marketing Strategies Report" study had more experience with RFID than those in previous studies, and were more apt to have production systems running. Despite having more of their own experience, and presumably needing to rely less on solution providers, respondents valued vendor experience even more highly than in the past.

After standards, the three most influential factors on how companies are perceived all relate to experience. These factors are how long the company has been involved with RFID, whether the vendor had implemented an RFID system at a business like the respondent's own company, and the total number of implementations the vendor had completed. These experiences, respondents indicated, are considered much more important than a vendor's size or whether it is focused exclusively on RFID.

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Experience is a great leveler in the RFID field that allows small systems integrators to compete with large, international multiline technology and consulting firms. For example, compare how the influence of a vendor's length of involvement with RFID compares to the influence of a company size (see Figure 40). Note that the company's length of involvement is a strong influence on three times more respondents than its size.

FIGURE 40: COMPARATIVE INFLUENCE: SIZE VS. RFID EXPERIENCE

	LENGTH OF RFID INDUSTRY INVOLVEMENT	COMPANY SIZE
VERY INFLUENTIAL	34%	11%
INFLUENTIAL	49%	34%
SOMEWHAT INFLUENTIAL	13%	45%
NOT VERY INFLUENTIAL	3%	3%
NO INFLUENCE	2%	2%
RESPONSE AVERAGE	**3.12**	**2.09**
INFLUENCE RANK (OUT OF 20)	**2nd**	**17th**

Complete data for experience-related questions is presented below. Whether the RFID vendor has done an implementation at a company like the respondent's own remains more influential than the vendor's total number of implementations, but the influence gap has narrowed since the last study. Similar implementations tied with length of RFID involvement as the most influential factor for how companies perceived, and had the most respondents rate it a "strong influence."

FIGURE 41: HOW VARIOUS TYPES OF EXPERIENCE INFLUENCE PERCEPTIONS OF RFID COMPANIES

	VERY INFLUENTIAL	INFLUENTIAL	SOMEWHAT INFLUENTIAL	NOT VERY INFLUENTIAL	NO INFLUENCE	RESPONSE AVERAGE
HOW LONG THE VENDOR HAS BEEN INVOLVED WITH RFID						
TOTAL RESPONDENTS	34%	49%	13%	3%	2%	3.12
END USERS	33%	47%	15%	3%	2%	3.06
CHANNEL	33%	52%	12%	2%	2%	3.14
IF THE VENDOR HAS IMPLEMENTED AN RFID SYSTEM AT A COMPANY LIKE THE RESPONDENT'S OWN						
TOTAL RESPONDENTS	45%	34%	13%	4%	3%	3.12
END USERS	44%	33%	14%	4%	4%	3.07
CHANNEL	43%	35%	16%	3%	2%	3.12
THE NUMBER OF RFID SYSTEMS THE COMPANY HAS IMPLEMENTED						
TOTAL RESPONDENTS	36%	43%	15%	4%	2%	3.07
END USERS	30%	43%	19%	5%	3%	2.92
CHANNEL	35%	42%	19%	2%	2%	3.06

A further indicator of the value of experience is the power of referrals. Personal referrals are one of the most powerful ways for RFID vendors to gain a positive reputation with prospective customers or partners. Of course, the more experience a vendor has, the more contacts it makes, and the more potential for referrals it enjoys. Referrals were the fifth-most influential factor measured, and the last one to be rated influential by at least 75 percent of respondents.

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FIGURE 42: HOW REFERRALS FROM COLLEAGUES INFLUENCE HOW RESPONDENTS PERCEIVE AN RFID COMPANY

	VERY INFLUENTIAL	INFLUENTIAL	SOMEWHAT INFLUENTIAL	NOT VERY INFLUENTIAL	NO INFLUENCE	RESPONSE AVERAGE
TOTAL RESPONDENTS	34%	43%	19%	3%	2%	3.06
END USERS	32%	41%	21%	4%	2%	2.97
CHANNEL	32%	43%	21%	3%	2%	3.02

PARTNERS

An RFID vendor's technology and integration partners are influential to 70 percent of respondents, while the number of partners a vendor has is only influential to 49 percent. This indicates respondents pay close attention to a vendor's partners, and whether they appear to be a good match to the respondents' business. The following table compares the strength of influence between the number of partnerships a vendor has, and its technology and integration partners (which implies the vendor's specific partners).

FIGURE 43: INFLUENCE LEVELS FOR AN RFID VENDOR PARTNER CONSIDERATIONS

	THE RFID VENDOR'S (SPECIFIC) TECHNOLOGY AND/OR INTEGRATION PARTNERS	THE NUMBER OF PARTNERSHIPS AN RFID VENDOR HAS
VERY INFLUENTIAL	28%	15%
INFLUENTIAL	42%	34%
SOMEWHAT INFLUENTIAL	24%	36%
NOT VERY INFLUENTIAL	4%	12%
NO INFLUENCE	2%	2%
RESPONSE AVERAGE	**2.96**	**2.42**
INFLUENCE RANK (OUT OF 20)	**6th**	**13th**

The partner influence data is similar to how a vendor's implementations at similar customers is more influential than its total number of implementations. Respondents want to see a focus on and experience in their industry or business process, whether the focus comes from the primary RFID vendor or one of its partners. For further evidence, consider that an RFID company's technology and integration partners are considered more important that whether that company is solely focused on RFID, as highlighted below.

FIGURE 44: INFLUENCE COMPARISON: RFID VENDOR'S PARTNERS VS. INDUSTRY FOCUS

	THE RFID VENDOR'S (SPECIFIC) TECHNOLOGY AND/OR INTEGRATION PARTNERS	WHETHER THE VENDOR IS SOLELY FOCUSED ON RFID
VERY INFLUENTIAL	28%	22%
INFLUENTIAL	42%	40%
SOMEWHAT INFLUENTIAL	24%	27%
NOT VERY INFLUENTIAL	4%	9%
NO INFLUENCE	2%	2%
RESPONSE AVERAGE	**2.96**	**2.71**
INFLUENCE RANK (OUT OF 20)	**6th**	**9th**

The following tables present complete response data for the questions referenced above. Not surprisingly, partner and vendor focus issues are most influential on channel companies, which are an RFID vendor's prospective partners.

FIGURE 45: HOW ITS TECHNOLOGY AND INTEGRATION PARTNERS INFLUENCE COMPANY PERCEPTION

	VERY INFLUENTIAL	INFLUENTIAL	SOMEWHAT INFLUENTIAL	NOT VERY INFLUENTIAL	NO INFLUENCE	RESPONSE AVERAGE
TOTAL RESPONDENTS	28%	42%	24%	4%	2%	2.96
END USERS	22%	42%	28%	6%	2%	2.76
CHANNEL	31%	42%	2%	23%	2%	2.97

FIGURE 46: HOW ITS NUMBER OF PARTNERSHIPS INFLUENCES COMPANY PERCEPTION

	VERY INFLUENTIAL	INFLUENTIAL	SOMEWHAT INFLUENTIAL	NOT VERY INFLUENTIAL	NO INFLUENCE	RESPONSE AVERAGE
TOTAL RESPONDENTS	15%	34%	36%	12%	2%	2.46
END USERS	14%	33%	36%	15%	3%	2.42
CHANNEL	16%	29%	41%	12%	3%	2.45

FIGURE 47: HOW SOLE FOCUS ON RFID INFLUENCES COMPANY PERCEPTION

	VERY INFLUENTIAL	INFLUENTIAL	SOMEWHAT INFLUENTIAL	NOT VERY INFLUENTIAL	NO INFLUENCE	RESPONSE AVERAGE
TOTAL RESPONDENTS	22%	40%	27%	9%	2%	2.71
END USERS	19%	39%	31%	9%	2%	2.66
CHANNEL	21%	38%	32%	7%	2%	2.69

PRIVACY

Item-level and supply chain RFID implementations have increased, and so has the importance of how RFID vendors treat privacy issues. The percentage of respondents influenced by an RFID vendor's sensitivity to privacy concerns jumped 20 percent from 2009 to 2011, to 83 percent—the highest level ever recorded.

FIGURE 48: HOW VENDOR SENSITIVITY TO PRIVACY INFLUENCES PERCEPTION

	VERY INFLUENTIAL	INFLUENTIAL	SOMEWHAT INFLUENTIAL	NOT VERY INFLUENTIAL	NO INFLUENCE	RESPONSE AVERAGE
TOTAL RESPONDENTS	24%	31%	28%	13%	4%	2.58
END USERS	24%	35%	27%	10%	4%	2.65
CHANNEL	26%	23%	34%	15%	3%	2.66

Respondents were not asked how concerned they are about RFID privacy, but rather how strongly they are influenced by the sensitivity to privacy that RFID vendors display. Some vendors choose to ignore privacy concerns and issues in their messaging, for fear of confusing or offending their audience. This question attempts to measure the value and risk of referencing privacy in messaging.

It appears that demonstrating concern for privacy will win favor with the RFID audience. Nearly a quarter of respondents said a vendor's sensitivity toward privacy is a strong influence on how they perceive the vendor—six times as many as those who indicated no such influence. The percentage of respondents who reported that sensitivity to privacy has little or no influence on their perception of vendors fell by more than half since 2009, to 17 percent. While privacy issues have become more influential, the overall response average of 2.58 puts the topic near the middle of the influence ranking.

MESSAGING AND CONTENT-ANALYSIS CONCLUSION

Vendor stability seems to be a theme among the factors influencing how vendors are perceived. The RFID audience favors companies that produce standards-compliant products, have history in the RFID industry, and have the customers and partners to prove they have successful industry experience.

The importance that RFID end users and channel professionals attach to standards creates a marketing challenge for RFID vendors: namely, how to show you offer a unique value proposition, while conforming to industry standards at the same time. There are many ways in which vendors can differentiate themselves, and this study provided clues about messaging that could make the most impact.

- Standardized products appear to be a market requirement for many respondents, who value a vendor's compliance with standards more than its propietary intellectual property.
- An RFID vendor's customers and partners say a lot about the company, whether or not that vendor chooses to promote them. An RFID company's partners and customer references were each among the most influential factors in terms of how that company is perceived.
- Experience matters—not only the RFID company's own experience, but the experience and industry focus of its technology and implementation partners.
- The RFID audience has become much more aware of how RFID vendors treat any potential privacy issues with their solutions.

RECOMMENDATIONS

Community and stability are important concepts for RFID vendors to respect and reflect in their marketing. The importance of community is seen in the extent to which RFID users, prospects and professionals value industry experience, as well as their strong preferences to learn about the technology and companies from sources within the RFID community. Manufacturers, software firms, integrators and other solutions providers that target the RFID market would be well served by communicating that they are a part of the community, and that they are committed to it for the long term. Stability is very important to the RFID audience, as shown by how it values standards and experience.

Beyond these general themes, the study demonstrated several specific marketing opportunities to pursue in the RFID market. The study both revealed new opportunities for RFID marketing and reinforced the fundamentals. Key findings and recommendations are highlighted below.

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- **Content captures the audience.** Various forms of substantive, educational content are highly valued, and are frequently used by the RFID audience. Case studies, white papers and analyst reports have always been the most popular RFID information sources, and remain so, even though new sources continue to emerge. Content marketing is, therefore, a very appropriate strategy for RFID companies.

- **Do not treat partners and industry analysts as secondary communications audiences.** Communicating to the RFID channel and analyst communities should be of primary importance. These professionals are extremely important for shaping the opinions of RFID providers, and also play an important role in educating prospects about RFID technology. Analyst relations should not be an afterthought to public relations and media relations, even for smaller and non-public companies. Similarly, some content should be developed specifically for the channel.

- **Instead of jumping on the social-media bandwagon, build a social-media freight train.** The RFID audience doesn't disdain social media; it just uses it less than other information sources. The low utilization reported may well be the result of the low-level content (for example, product, personnel and award announcements, vague or irrelevant questions or discussion topics from posters) that characterizes many social-media sites. Since the RFID audience favors case studies and in-depth content, marketers should explore how social media could be used to deliver them. What's more, social-media initiatives should be designed to deliver a heavy load of content.

- **Make standards references standard procedure.** Companies that offer standards-compliant products should make that very clear to anyone who casually browses their site or picks up their literature. Those without standard products should be prepared to communicate why not, and why that is beneficial for their customers.

- **Don't be afraid to tweak the marketing mix.** Webinars and blogs have become more important resources over the past two years, and social media has strong potential to quickly do the same. RFID marketers don't have to be married to the tactics and priorities that were used in the past, even if they were successful, and shouldn't be afraid to experiment with new forms of communication. While this report emphasized audience preferences and focused on how various communication and messaging options compared to each other, it is important to note that nearly everything measured in the study was important, influential or likely to be utilized by a significant portion of respondents.

The 2011 research also affirmed and validated previous findings and best practices for RFID marketing. The most pertinent recommendations from previous studies are presented below, and have been updated to reflect the current environment.

- **Companies can best help themselves by developing a content-rich Web site.** The Web is the preferred medium for learning about RFID companies. A heavy emphasis on Web content is a budget-friendly strategy that companies of all sizes can pursue. Customer references have the most influence with end-user and industry-professional audiences of any theme measured. Thus, making customer references in the form of case studies available online gives the audience what it wants.

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- **Be accessible.** Many of the most important influences and messages can be featured on a company's Web site, including customer references, partners, white papers, partner relationships and citations in research and analyst reports. Make these items highly visible and easy to download for online visitors. Offer social-media options for those who want them, but not at the expense of developing the content and communications resources that prospects prefer.

- **RFID-focused media is more effective than RFID-focused messaging.** RFID-focused publications, Web sites, newsletters and associations are clearly favored by respondents over general technology or vertical-industry organizations that cover RFID. That said, the technology should not dominate the content of the marketer's message. Prospects want to see RFID presented as part of a larger story that addresses integration with other technologies and business processes, limitations and challenges, and realistic discussion of the business case.

- **Layer and leverage.** Seek opportunities to use tactics that are perceived as less important or influential (such as advertising and social media) to leverage the more important ones. For instance, if you develop an issues-oriented white paper, try to start a debate or discussion about it on an online discussion forum.

- **Use advertising as a gateway.** Advertising should not be considered the endpoint in a marketing campaign. Ad placements should be used as a hook to promote the most influential marketing mediums by, for example, driving traffic to informational Web sites or inviting respondents to receive a free content-rich white paper. Ad content should be tailored to reflect the themes that carry the most significance for the RFID audience. Because customer references are so highly regarded, a testimonial campaign should be viewed favorably. Displaying logos that denote standards compliance and partnerships is a cost-efficient way to boost impact.

- **Invest in PR to influence indirect channels of communication.** Companies are sometimes reluctant to spend on what they can not control, so public-relations activities used to influence editorial coverage often lose dollars to advertising and Web-marketing initiatives that offer more direct control over messaging and distribution. Yet, this study found that editorial mentions, word of mouth and other buzz about a company are more influential than advertising. Companies should acknowledge the value that PR plays in influencing attitudes and commit to regular media outreach, despite the fact that returns on PR investments are notoriously difficult to measure. This recommendation extends to analyst relations.

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APPENDIX A: MARKETING STRATEGIES SURVEY QUESTIONNAIRE

[Optional] Enter your name, mailing address and e-mail to get a discount when the report goes on sale.

---

1. Where are you based?

- ☐ United States or Canada
- ☐ Mexico, Caribbean, Central or South America
- ☐ Asia
- ☐ Europe
- ☐ Middle East
- ☐ Africa
- ☐ Australia or Oceania

2. Which of the following best describes the industry your company is in?

- ☐ Academic
- ☐ Aerospace / Aviation
- ☐ Apparel / Footwear
- ☐ Automotive
- ☐ Chemicals / Adhesives
- ☐ Consulting / Business Services / Legal
- ☐ Consumer Electronics / Electronic Components
- ☐ Consumer Packaged Goods
- ☐ Education / Library / Research
- ☐ Energy / Utility
- ☐ Entertainment / Media / Publishing
- ☐ Financial Services / Venture Capital
- ☐ Food / Agriculture
- ☐ Forestry / Pulp / Paper
- ☐ Government / Library / Nonprofit
- ☐ Health Care / Pharmaceutical
- ☐ IT – Software, Hardware, Service Provider
- ☐ Legal services
- ☐ Manufacturing
- ☐ Military / Homeland Security
- ☐ Retail
- ☐ Packaging / Label manufacturing
- ☐ RFID Hardware, Software or Services
- ☐ Transportation / Logistics
- ☐ Transit operator
- ☐ Other (please list)

_____

3. What is the size of your company by annual revenue?

- ☐ Less than $1 million
- ☐ $1 to $10 million
- ☐ $11 to $100 million
- ☐ $101 to $500 million
- ☐ $501 million to $1 billion
- ☐ More than $1 billion

4. How long have you been reading about, learning, or generally following RFID?

- ☐ Less than 1 year
- ☐ 1 to 2 years
- ☐ 2+ to 3 years
- ☐ 3+ to 4 years
- ☐ 4 to 10 years
- ☐ More than 10 years

5. How much direct, hands-on experience do you have working with RFID hardware and/or software?

- ☐ Less than 1 year
- ☐ 1 to 2 years
- ☐ 2+ to 3 years
- ☐ 3+ to 4 years
- ☐ 4 to 10 years
- ☐ More than 10 years

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6. Do you work for a company that sells, resells, or otherwise provides RFID services or products?

- ☐ No
- ☐ Yes

If yes, is your company primarily a:

- ☐ Hardware manufacturer
- ☐ Software provider
- ☐ Systems integrator/reseller/distributor/consultant/other channel company

7. Are you part of a team making RFID purchasing decisions?

- ☐ Yes
- ☐ No, but I will be an influencer
- ☐ No
- ☐ Not sure

8. At what stage of RFID deployment is your company?

- ☐ We are using a production RFID system
- ☐ We are implementing a production RFID system
- ☐ We are running an RFID pilot
- ☐ We are implementing an RFID pilot
- ☐ We are researching RFID solutions (no implementations yet)
- ☐ We have no plans to implement RFID technology

9. If your company is considering the purchase of new or additional RFID products or services, what is the timeframe?

- ☐ Within the next year
- ☐ Within 2 years
- ☐ Within 5 years
- ☐ Eventually, but not in the foreseeable future
- ☐ There is no plan to purchase RFID products or services

10. In general, how influential are the following sources of information about RFID product and service providers:

	STRONG INFLUENCE	SOME INFLUENCE	VERY LITTLE INFLUENCE	NO INFLUENCE
The company's own sources (marketing communications, its website, direct sales, etc.)	☐	☐	☐	☐
Media sources (magazines, media-run newsletters and websites, etc.)	☐	☐	☐	☐
Professional sources (consultants, analysts, systems integrators, etc.)	☐	☐	☐	☐

11. In the past 12 months, have you done any of the following:

	YES	NO
Attend an RFID vendor webinar	☐	☐
Read or download an RFID vendor white paper	☐	☐
Read or download an RFID vendor case study	☐	☐
Read or download an analyst or research report on RFID	☐	☐
Respond to an RFID print advertisement	☐	☐
Respond to an online RFID advertisement	☐	☐
Use social media (LinkedIn, FaceBook, Twitter, et al) **to learn about RFID**	☐	☐
Attend an RFID-focused trade show	☐	☐
Seek RFID information and companies at a vertical or industry-focused trade show (e.g. ProMat, NRF, HIMSS)	☐	☐

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12. In the next 12 months, how likely are you to the following:

	VERY LIKELY	PROBABLE	SOMEWHAT LIKELY	NOT VERY LIKELY	DOUBTFUL
Attend an RFID vendor webinar	☐	☐	☐	☐	☐
Read or download an RFID vendor white paper	☐	☐	☐	☐	☐
Read or download an RFID vendor case study	☐	☐	☐	☐	☐
Read or download an analyst or research report on RFID	☐	☐	☐	☐	☐
Respond to an RFID print advertisement	☐	☐	☐	☐	☐
Respond to an online RFID advertisement	☐	☐	☐	☐	☐
Use social media (LinkedIn, FaceBook, Twitter, et al) to learn about RFID	☐	☐	☐	☐	☐
Attend an RFID-focused trade show	☐	☐	☐	☐	☐
Seek RFID information and companies at a vertical or industry-focused trade show (e.g. ProMat, NRF, HIMSS)	☐	☐	☐	☐	☐

13. In which areas of RFID are you interested and/or involved? (Check all that apply.)

- ☐ Animal identification
- ☐ Anti-counterfeiting/product authentication
- ☐ Asset tracking
- ☐ Automating production
- ☐ Cold chain management
- ☐ Document/file management
- ☐ E-pedigree
- ☐ Event ticketing
- ☐ Fleet management
- ☐ Inventory/cargo management
- ☐ Logistics/transportation management
- ☐ Monitoring environmental conditions (temperature, humidity, light, vibration, etc.)
- ☐ Patient management
- ☐ Payment/loyalty systems
- ☐ Recycling
- ☐ Security
- ☐ Supply chain management
- ☐ Toll collection/transit fare
- ☐ Tool management
- ☐ Tracking the location and conditions of cargo
- ☐ Warehouse/supply chain management
- ☐ Waste management
- ☐ Work-in-process tracking
- ☐ Other (please list)

_____

14. How important are the following sources for learning about RFID in general?

	STRONG INFLUENCE	SOMEWHAT IMPORTANT	NOT VERY IMPORTANT	NOT AT ALL IMPORTANT
RFID hardware or software vendors	☐	☐	☐	☐
Consultants, integrators, resellers and other RFID vendor channel partners	☐	☐	☐	☐
RFID industry trade associations (e.g. AIM, EPCglobal, etc.)	☐	☐	☐	☐
Vertical industry trade associations (e.g. APICS, HDMA, MHIA, etc.)	☐	☐	☐	☐
RFID-focused trade magazines	☐	☐	☐	☐
Vertical industry or IT-focused trade magazines	☐	☐	☐	☐
RFID-focused websites, blogs, and newsletters	☐	☐	☐	☐
Vertical industry or IT-focused websites, blogs, and newsletters	☐	☐	☐	☐
Social media outlets (e.g. LinkedIn groups, Twitter feeds, etc.)	☐	☐	☐	☐
Trade shows	☐	☐	☐	☐
Research and analyst firms	☐	☐	☐	☐

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15. How important are the following sources for learning about a particular RFID company?

	VERY IMPORTANT	SOMEWHAT IMPORTANT	NOT VERY IMPORTANT	NOT AT ALL IMPORTANT
Its direct sales efforts	☐	☐	☐	☐
Its white papers	☐	☐	☐	☐
Its blog	☐	☐	☐	☐
The company's own website	☐	☐	☐	☐
Its newsletter	☐	☐	☐	☐
Its online communities (Tweets, LinkedIn discussion groups, etc.)	☐	☐	☐	☐
Its case studies/customer profiles	☐	☐	☐	☐
Its exhibit at RFID events	☐	☐	☐	☐
Its training/workshops	☐	☐	☐	☐
Its webinars & webinar sponsorships	☐	☐	☐	☐
Its print promotions	☐	☐	☐	☐
Its online promotions	☐	☐	☐	☐
Word-of-mouth	☐	☐	☐	☐
Consultants/systems integrators	☐	☐	☐	☐

16. You're almost done! Please rate how much the following characteristics influence your positive perception of an RFID company.

	STRONG INFLUENCE	SOME INFLUENCE	VERY LITTLE INFLUENCE	NO INFLUENCE
Company size	☐	☐	☐	☐
How long the company has been in RFID	☐	☐	☐	☐
If the company is solely focused on RFID	☐	☐	☐	☐
How often the company advertises in print	☐	☐	☐	☐
How often the company advertises online	☐	☐	☐	☐
The company's participation in online communities	☐	☐	☐	☐
Whether the company has been referred by a colleague	☐	☐	☐	☐
How often the company is discussed in market research reports	☐	☐	☐	☐
How often the company makes announcements	☐	☐	☐	☐
How often the company is written about	☐	☐	☐	☐
Patents held/intellectual property position	☐	☐	☐	☐
How sensitive the company is to RFID privacy concerns	☐	☐	☐	☐
How active the company is in standards development	☐	☐	☐	☐
If the company offers standards-compliant products	☐	☐	☐	☐
If the company has implemented an RFID solution at a company like mine	☐	☐	☐	☐
Number of RFID systems the company has implemented	☐	☐	☐	☐
The number of partnerships the company has	☐	☐	☐	☐
How much of a presence the company has at trade shows	☐	☐	☐	☐
If the company has speakers at trade shows	☐	☐	☐	☐
The company's technology and/or integration partners	☐	☐	☐	☐