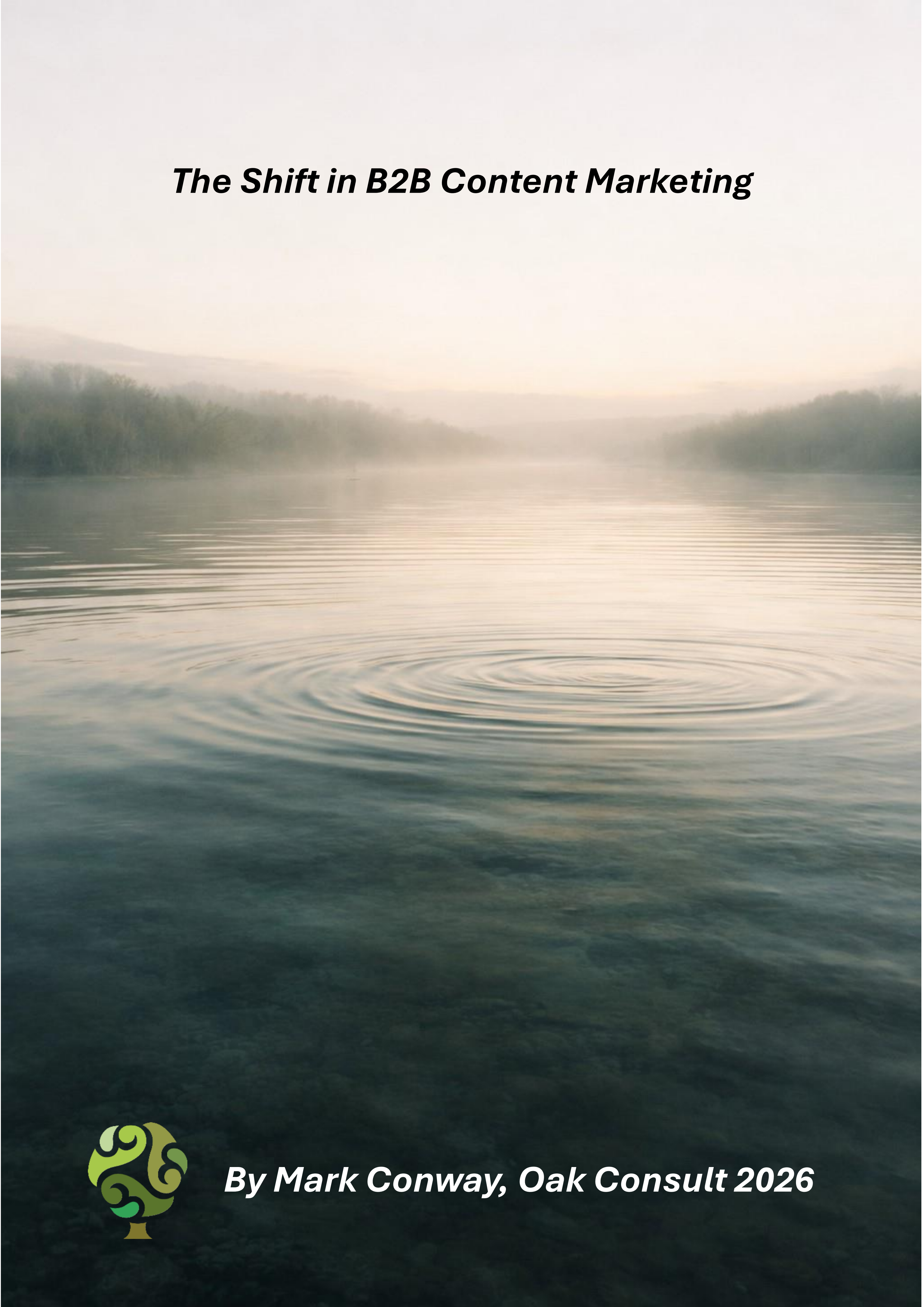
The Shift in B2B Content Marketing



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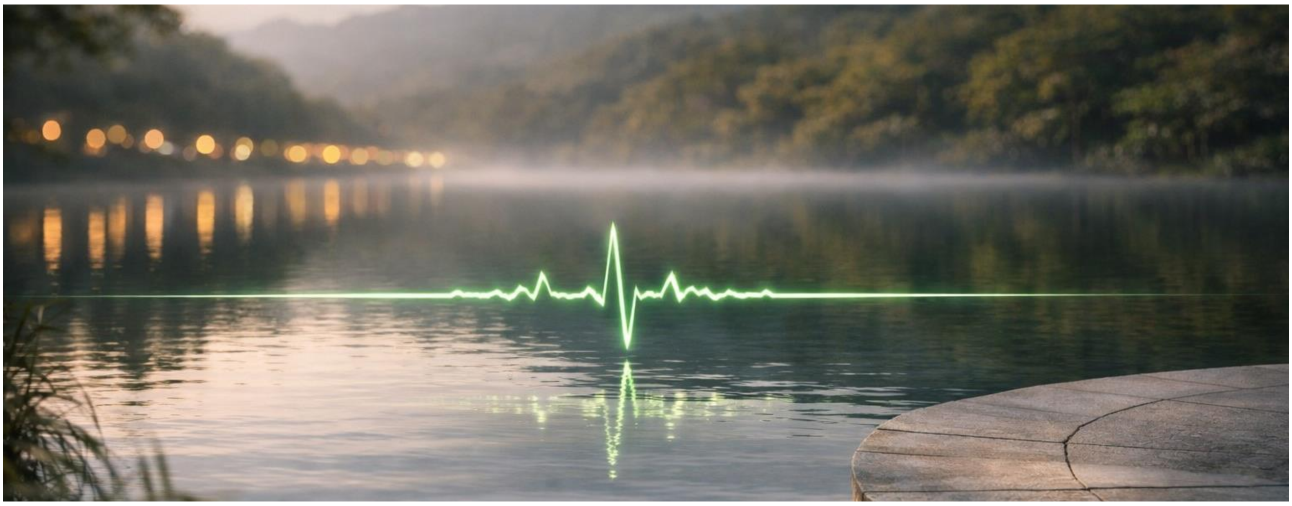


Foreword

This paper is written for leaders who sense that something has changed, even if it is difficult to name precisely.

Across many B2B organisations, content activity has increased while confidence in its impact has quietly declined. Blogs are published. Posts are shared. Campaigns run. Yet the feeling that it all adds up to a clearer market position has weakened rather than strengthened.

This is not usually experienced as a failure. More often, it shows up as friction.

Sales conversations take longer to establish context. Prospects arrive with partial or uneven understanding. Messaging feels perpetually “under review”. Teams work hard, but the organisation’s external story never quite settles.

The intention behind this paper is not to criticise those efforts, nor to prescribe tactics. Many of the approaches now under strain were effective for a long time. They were shaped by an environment that rewarded volume, visibility, and campaign momentum.

That environment has changed.

Today, buyers encounter organisations long before engagement begins. They form impressions through fragments of content encountered across time, platforms, and people. In this context, content acts less as promotion and more as evidence — shaping assumptions about clarity, credibility, and confidence without ever asking for attention directly.

This shift carries implications that extend beyond marketing.

When content influences perception before sales involvement, and when credibility compounds through patterns rather than moments, responsibility cannot sit with activity alone. Narrative coherence becomes a leadership concern, requiring stewardship rather than optimisation.

This paper explores that shift.

It does not offer a playbook or a set of techniques. Instead, it examines why familiar content models now deliver diminishing returns, what distinguishes the organisations adapting most effectively, and why the response required is structural rather than tactical.

The aim is to provide a lens — a way of seeing the current landscape more clearly — so that leaders can decide, with confidence, what to reinforce, what to let go of, and what must remain true over time.

2. Executive Summary

B2B content marketing has not failed. The environment in which it operates has changed — and quietly stayed changed. Organisations are producing more content than ever, yet many are experiencing diminishing returns. Visibility continues, activity remains high, but clarity does not compound. Sales conversations still begin with explanation rather than momentum. Confidence in the offer exists internally, while understanding weakens externally. This whitepaper explores why.

The modern B2B environment is defined by saturation, algorithmic mediation, and increasingly quiet buyer behaviour. Content is no longer scarce, nor is distribution neutral. Buyers encounter organisations through fragments of messaging across time and channels, forming judgements long before formal engagement begins. In this context, content functions less as promotion and more as evidence.

What matters now is not the performance of individual pieces, but the patterns they create. Buyers assess whether an organisation appears confident or reactive, coherent or fragmented, deliberate or opportunistic. They infer clarity, credibility, and judgement without being asked to. Silence, inconsistency, or sudden shifts in emphasis are interpreted as signals in their own right.

As a result, traditional volume-led and campaign-driven approaches struggle to compound trust. One-off fixes — rebrands, messaging refreshes, flagship campaigns — may create temporary visibility, but rarely produce lasting recognition. Credibility does not reset cleanly. It accumulates, or erodes, over time. The organisations adapting most effectively have made a different set of choices.

They narrow their focus. They reinforce a small number of ideas deliberately. They treat content as a continuity system rather than a campaign engine. Leadership involvement is visible at the level of intent, not execution, ensuring that narrative coherence is protected as messages travel through people, platforms, and time. This represents a quiet but significant shift in responsibility.

Content can no longer be managed solely as a marketing output. When it operates as evidence, shaping perception before sales engagement begins, narrative coherence becomes a leadership concern. Someone must decide what the organisation is prepared to be recognised for — and steward that position consistently. The response required is therefore structural, not tactical.

This paper does not offer a checklist or playbook. Instead, it provides a lens for understanding why familiar approaches now deliver weaker results, and what characterises a more sustainable alternative. One built on stewardship rather than spikes, rhythm rather than resets, and clarity rather than noise. In an environment saturated with activity, recognition is earned not by saying more, but by saying fewer things more deliberately — and reinforcing them long enough for them to land.

3. The environment has changed and quietly stayed changed

For many B2B leaders, the most disorientating aspect of today's content challenge is not that results have collapsed, but that they have *thinned*.

Activity continues. Content goes out. Engagement still happens in places. Yet the sense that it is all adding up to something meaningful has weakened. Effort feels higher, but progress feels less certain.

This is not a temporary dip, nor the result of a single platform change or tactical mistake. It reflects a deeper environmental shift that has been underway for several years — and has now fully settled.

The first and most obvious change is saturation.

The cost and friction of content production have fallen dramatically. What once required time, specialist capability, and budget can now be produced quickly and cheaply at scale. As a result, B2B buyers are surrounded by competent, well-presented material: blogs that explain, posts that comment, whitepapers that summarise. Much of it is accurate. Much of it is reasonable. Very little of it is distinctive.

In this environment, quality alone is no longer enough. The issue is not whether content is good in isolation, but whether it is *recognisable* over time.

At the same time, distribution has become increasingly mediated.

Platforms no longer function as neutral channels. Algorithms now decide what is surfaced, what is suppressed, and what quietly disappears. Their logic is not based on organisational effort or intent, but on observed behaviour: what people stop for, respond to, or engage with in meaningful ways.

This has introduced a second-order effect that many organisations underestimate. Content that feels important internally can be effectively invisible externally. Not because it is wrong, but because it does not register as a strong enough signal within a crowded environment.

This is compounded by the way platforms now treat outbound behaviour. Evidence suggests that posts relying on external links routinely experience a 25–35% reduction in reach, compared to content that delivers its value natively within the platform.

The consequence is subtle but important: **organisations that rely on link-led distribution appear quieter, less consistent, and less present than they believe themselves to be** — even when effort remains high.

Alongside this, buyer behaviour has continued to evolve.

B2B decisions are now shaped long before formal sales engagement begins. Research happens quietly, across multiple channels, often without leaving clear traces. Buyers skim widely, compare subconsciously, and form impressions incrementally. By the time they engage directly, a working narrative already exists — favourable or not.

In this context, content is no longer primarily a demand-generation tool. It functions as *ambient evidence*. It creates assumptions about clarity, credibility, and confidence without ever asking for attention explicitly.

Finally, artificial intelligence has accelerated all of the above.

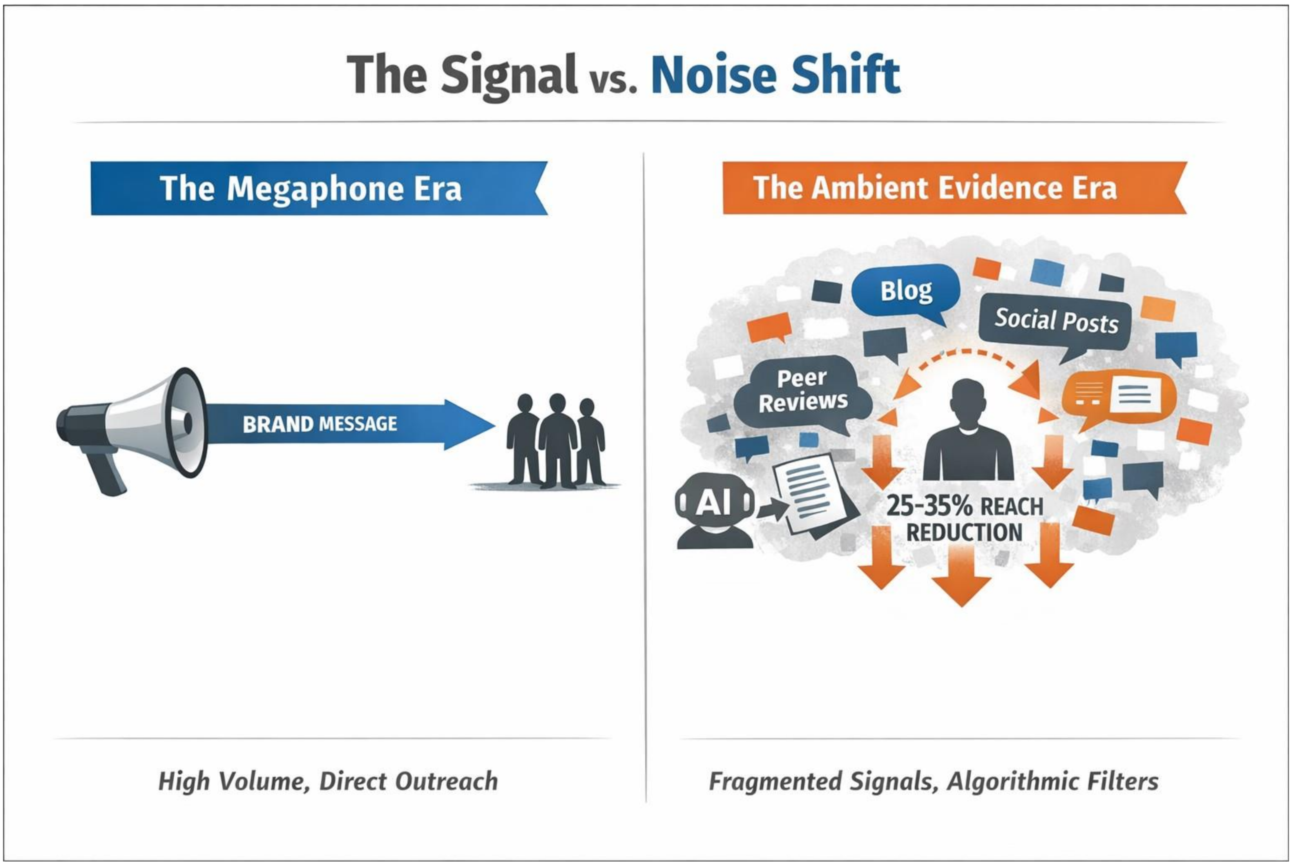
AI has not changed what buyers care about, but it has removed scarcity from information and increased the speed at which material is produced, summarised, and reused. Content is now interpreted and represented by machines as well as people. This places even greater emphasis on consistency, structure, and clarity of intent.

Taken together, these shifts create a difficult but important reality.

The environment no longer rewards volume by default. It does not reliably reward effort. And it does not compensate for inconsistency. Instead, it amplifies whatever signal an organisation is already sending — whether that signal is clear or confused.

This is why many organisations find themselves working harder without feeling more confident. They are operating with assumptions shaped by an earlier environment, in a context that now behaves very differently.

The result is not failure, but friction. And friction, left unaddressed, quietly compounds.



4. From brand voice to human ecosystems

For much of the past decade, B2B organisations were encouraged to “find their brand voice” and apply it consistently across every channel. Tone-of-voice guidelines were created. Messaging frameworks were agreed. Control and consistency were seen as the primary safeguards of credibility.

That model assumed the corporate brand was the main interface with the market.

It no longer is.

Today, buyers do not experience organisations through a single, unified voice. They encounter them through a dispersed set of human signals: leaders, specialists, employees, partners, peers, and third-party commentary. These signals appear across time and context, often long before a website is visited or a sales conversation begins.

A comment from a managing director.
A post shared by a subject-matter expert.
A panel appearance or podcast mention.
A recommendation passed quietly within a network.

Individually, these moments may seem minor. Collectively, they shape perception.

This marks a fundamental shift in how trust forms in B2B markets. Authority has decentralised.

This shift is not merely perceptual. Recent research shows that 61% of B2B brands report higher ROI from micro-influencers and subject-matter experts than from large, centralised analyst or macro-influencer voices.

The implication is not that scale no longer matters, but that **credibility is now earned through proximity, relevance, and lived expertise rather than broadcast reach alone**.

Credibility no longer sits primarily with the logo, the homepage, or the corporate channel. It flows through people — through how they speak, what they repeat, and how consistently they express judgement over time. The organisation remains present, but it is no longer the sole narrator of its own story.

This does not mean the corporate brand has become irrelevant. Its role has changed.

Rather than acting as a broadcaster, the brand now functions more like a centre of gravity. It sets intent, tone, and boundaries. It provides coherence. Trust, however, is generated and reinforced through human expression around it.

Buyers instinctively recognise this difference. They place greater weight on language that feels lived-in rather than approved. They respond to judgement more than polish. They look for signs that an organisation's thinking holds together when expressed by different people, in different places, over time. Many organisations struggle here, often without realising why.

Internally, the brand may feel well managed. Messaging appears consistent on the website and in formal materials. Externally, however, the market's understanding is shaped by a far wider and less controllable set of signals — some aligned, some diluted, some contradictory.

Attempts to correct this often swing between two extremes.

Some organisations tighten control, reinforcing central approval processes in an effort to restore consistency. Others encourage more employee and leadership posting without sufficient narrative guidance, hoping that volume will compensate.

Neither approach addresses the underlying shift.

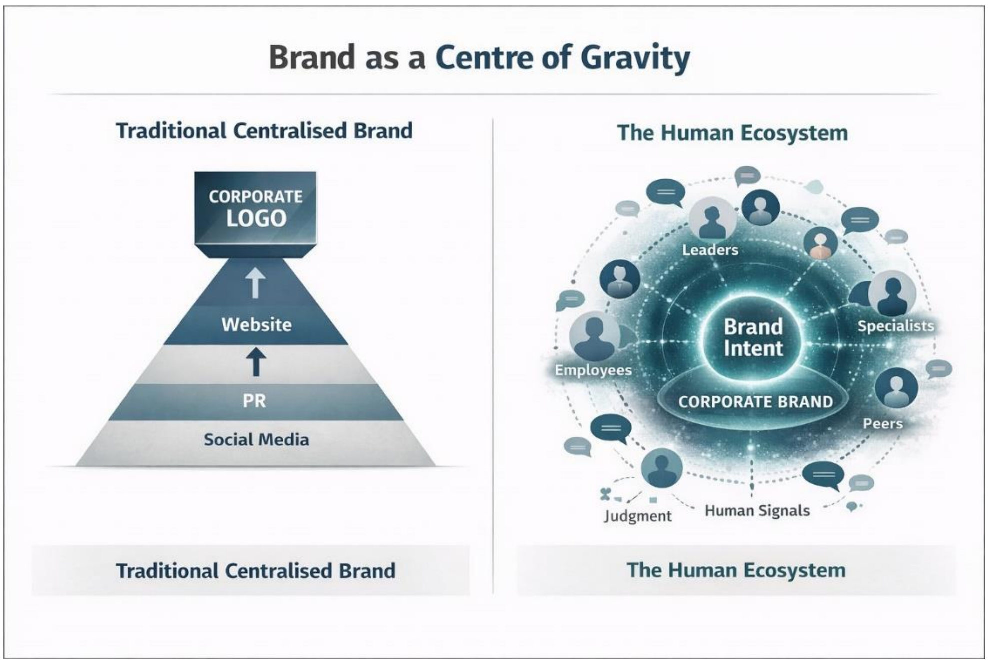
The challenge is no longer about controlling the message. It is about **stewarding coherence across a human ecosystem**.

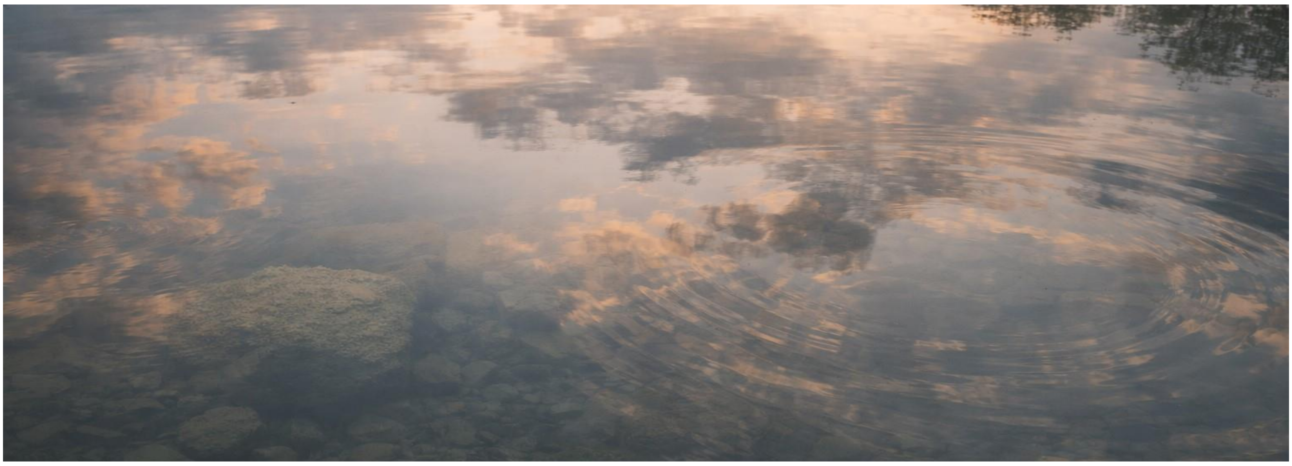
In healthy ecosystems, not everyone says the same thing. But they do tend to express the same underlying truths. Over time, patterns emerge. Themes repeat. Recognition builds.

Where this stewardship is absent, the opposite occurs. Individual pieces of content may perform adequately in isolation, but together they fail to compound. Buyers encounter activity without clarity, presence without meaning, and effort without signal.

This is why the move from brand voice to human ecosystems is so destabilising for traditional content models. Campaigns and calendars were designed to manage output, not to protect coherence across people, platforms, and time.

It also explains why leadership involvement becomes unavoidable. Narrative intent cannot be delegated indefinitely. Someone must decide what the organisation is prepared to be recognised for — and hold that line as it travels through human expression rather than centralised control.





5. Content has become evidence

In earlier phases of B2B marketing, content functioned primarily as explanation or promotion. It existed to inform prospects, support campaigns, or drive discrete actions. Its effectiveness was judged by visibility and response.

That assumption no longer holds.

In today's environment, content increasingly operates as **evidence**.

Long before a buyer engages directly, they encounter fragments of an organisation's thinking: articles, posts, commentary, shared links, and third-party references. These encounters are rarely sequential or comprehensive. They are partial, ambient, and cumulative.

From these fragments, buyers form judgements.

They assess whether the organisation appears confident or reactive, clear or vague, considered or opportunistic. They infer whether its thinking holds together, whether it understands its own priorities, and whether it can be trusted to navigate complexity.

Crucially, this assessment happens without the organisation's involvement.

Content is no longer waiting to be consumed. It is being *observed*.

This matters because an increasing proportion of buyers actively prefer to explore without sales involvement. Recent research indicates that up to 75% of B2B buyers want a rep-free experience for as much of the journey as possible.

In practical terms, this means content is no longer merely supportive of sales. It functions as a **digital storefront** — the place where confidence is built or lost before human contact ever occurs.

In this context, consistency becomes more important than persuasion. Buyers are less influenced by how compelling a single piece of content is than by whether multiple encounters reinforce a stable impression over time.

Silence, too, is interpreted.

Gaps in presence, sudden changes in emphasis, or long periods of inactivity followed by bursts of messaging are rarely seen as neutral. They raise questions. What has changed? What is being prioritised? Is this organisation confident in its direction, or reacting under pressure?

Even accurate content can create negative signals if it appears disconnected from what came before or after.

This is why content now plays a role in due diligence, whether organisations intend it to or not. Buyers use it to reduce uncertainty. They look for signs of judgement: what is repeated, what is avoided, and what is treated as important enough to return to.

In this sense, content no longer simply communicates value. It *implies* it.

When messaging is coherent over time, content builds reassurance quietly. Prospects arrive with context. Sales conversations start further up the curve. Less energy is spent re-establishing credibility.

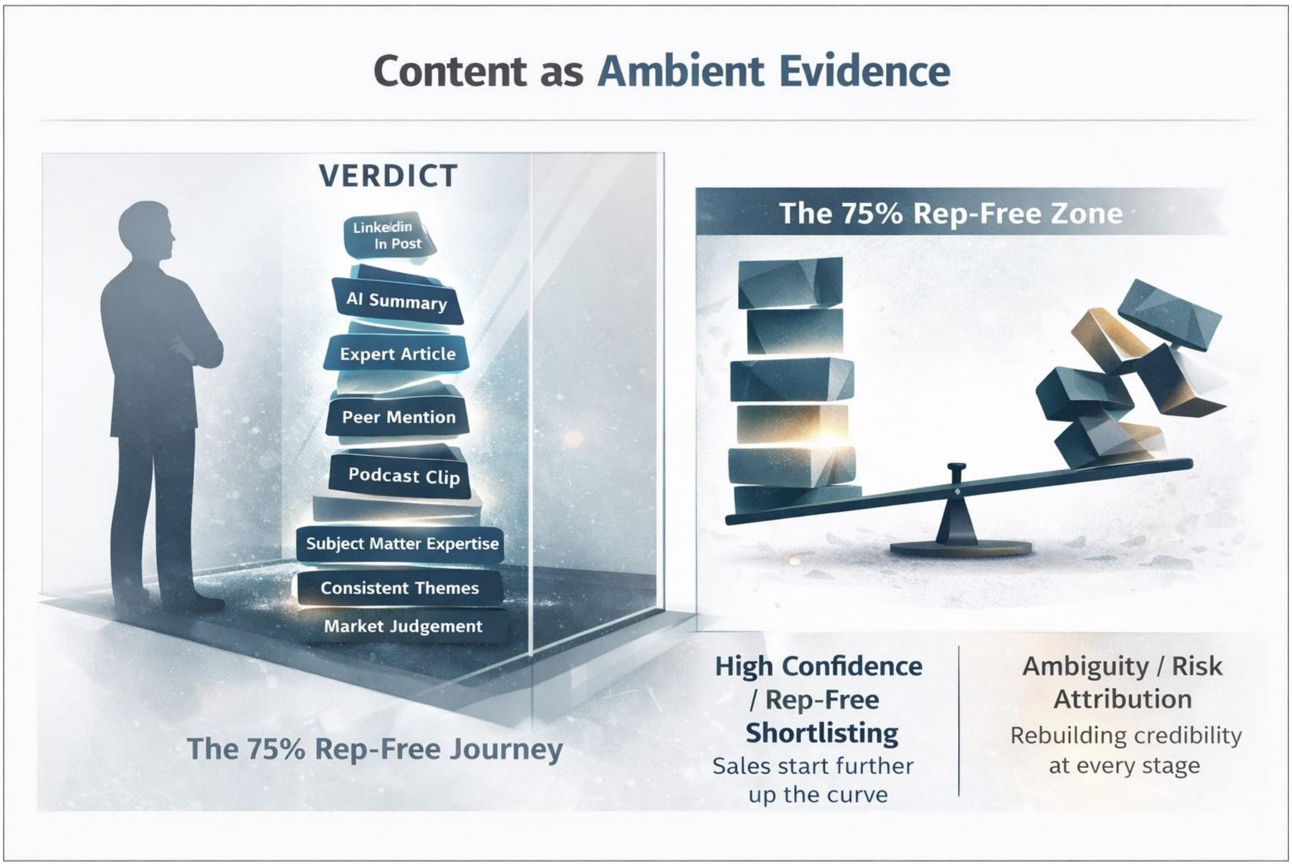
When coherence is absent, the opposite occurs. Each new interaction requires reorientation. Confidence has to be rebuilt repeatedly. The organisation may still be visible, but it is not progressively better understood.

This reframes the role of content entirely.

It is no longer a discrete marketing activity that can be judged piece by piece. It is part of the organisation's public operating system — a continuous stream of signals from which the market draws conclusions.

Seen through this lens, the risks of fragmentation become clearer. Content that reacts too readily to short-term urgency, or that shifts emphasis without explanation, does not simply "fail to land". It leaves behind ambiguous evidence.

Over time, those ambiguities accumulate.



6. What the best B2B organisations are doing differently

Against this backdrop, a small but growing number of B2B organisations are adapting successfully. Their approach stands out not because it is louder or more inventive, but because it is calmer. From the outside, their content presence can appear understated. They are not chasing every trend, nor are they publishing at the highest possible frequency. Yet over time, they become easier to recognise, easier to describe, and easier to trust. The difference lies in a small number of consistent behaviours.

First, they have narrowed their focus.

Rather than attempting to address every audience concern or respond to every market signal, they are deliberate about what they want to be known for. A limited set of themes is chosen and reinforced. New content does not introduce new directions; it deepens existing ones. This restraint creates coherence. Buyers encounter familiar ideas expressed in different ways, rather than a succession of new messages competing for attention. Recognition builds not through novelty, but through repetition with intent.

Second, they treat content as a continuity system rather than a campaign engine.

Their presence does not spike and reset. It accumulates. Messages are reinforced across months and quarters, allowing understanding to compound. Learning happens gradually, through observation rather than reaction. This continuity reduces internal friction. Teams spend less time debating what to say next, because the narrative direction is already clear. Energy is invested in expression and refinement, not reinvention.

Third, leadership involvement is visible at the level of intent, not execution.

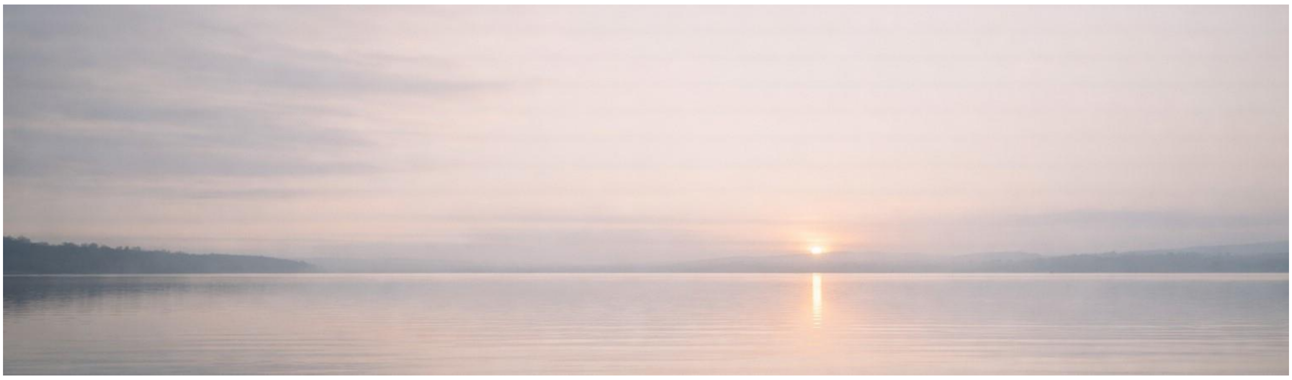
Senior leaders are clear on the few truths the organisation is prepared to stand behind publicly. Those truths guide content decisions across channels and contributors. Marketing teams are not left to infer priorities from shifting commercial pressure; they operate within agreed boundaries. This does not slow delivery. It stabilises it.

Finally, these organisations have accepted that authority develops over time.

They do not expect immediate spikes in attention or dramatic short-term returns. Instead, they look for quieter indicators: improved quality of first conversations, reduced need for explanation, and a growing sense that prospects already "understand" them before engagement begins. As a result, their content presence feels confident rather than anxious. It signals judgement rather than urgency.

Importantly, none of this requires exceptional creativity, large budgets, or constant innovation. It requires discipline, clarity, and the willingness to prioritise coherence over activity.

In a saturated environment, this approach stands out precisely because it is rare.



7. The quiet shift leaders need to make

As content has shifted from promotion to evidence, responsibility for its effectiveness has moved with it. This is the point at which the challenge ceases to be purely a marketing concern and becomes a leadership one. Historically, leaders could delegate content with confidence. Marketing teams planned campaigns, agencies produced materials, and outputs were reviewed periodically. As long as activity continued and metrics appeared healthy, the system felt under control.

The current environment breaks that assumption. When buyers form judgements long before engagement, and when those judgements are shaped by patterns rather than individual pieces, no amount of tactical optimisation can compensate for unclear intent. Someone must decide what the organisation is prepared to be recognised for — and protect that position over time.

This is the quiet shift many leadership teams have not yet fully acknowledged.

The question is no longer whether content is "on brand" in a stylistic sense. It is whether the organisation is expressing a small number of truths consistently enough for them to survive contact with the market. Without that stewardship, drift becomes inevitable. Different parts of the organisation respond to different pressures. Sales emphasises reassurance. Marketing experiments with new angles. Product highlights innovation. Individually, these decisions are rational. Collectively, they fragment the signal.

From the outside, the organisation appears active but unsettled. Messaging shifts subtly month to month. Priorities seem to change without explanation. Content continues, but confidence erodes. This erosion is rarely dramatic. It shows up as friction rather than failure. Conversations take longer to establish context. Prospects ask basic questions later than expected. Pricing discussions feel more defensive. Internally, the symptoms are familiar. Messaging is repeatedly "under review". Content decisions are revisited more often than they should be. Teams sense that something is off, but struggle to articulate what.

The organisations that adapt make a simple but significant move: they treat narrative coherence as a strategic asset.

This does not mean leaders write posts or approve copy line by line. It means they define and protect the few ideas that must remain stable, even as circumstances change. Those ideas act as anchors. They give teams permission to operate with confidence, rather than constantly recalibrating.

Paradoxically, this kind of leadership involvement creates flexibility, not rigidity. When intent is clear, expression can vary without undermining coherence. Content becomes easier to produce, not harder. Decisions accelerate. Debate reduces.

Most importantly, the market experiences something increasingly rare: consistency.

8. Why one-off fixes do not stick

When organisations recognise that their content is no longer compounding trust, a familiar response follows: fix it properly.

A rebrand. A messaging refresh. A flagship campaign. A new positioning statement.

These interventions can be valuable. In some cases, they are necessary. But on their own, they rarely produce lasting change. The reason is structural.

Credibility does not reset cleanly. It accumulates — or erodes — over time. Buyers do not recalibrate their understanding of an organisation based on a single moment, however polished. They recalibrate based on what they see repeatedly, across different contexts, over extended periods. One-off fixes create visibility spikes. They do not create continuity.

From the outside, this pattern is easy to recognise. An organisation appears sharper for a short period, then gradually drifts as new priorities emerge and attention shifts elsewhere. Messaging subtly evolves. Emphasis moves. The centre of gravity changes again. From the inside, this feels like progress followed by frustration. Energy is invested, results appear briefly, and then the same questions resurface: Are we clear enough? Are people getting it? Do we need to revisit the message again?

Campaign-led thinking reinforces this cycle.

Campaigns are designed to peak. They reward novelty, urgency, and change. Credibility, by contrast, rewards repetition, restraint, and patience. When campaigns become the primary mechanism for managing content, clarity is continually reset rather than reinforced. This also limits learning.

In a saturated and algorithm-mediated environment, organisations cannot reliably predict in advance what will resonate. Insight emerges through observation over time. Patterns only become visible when messages are held steady long enough to see how the market responds.

One-off efforts end just as meaningful learning begins.

This is why so many well-intentioned initiatives fail to stick. They address symptoms rather than structure. They treat credibility as something that can be installed, rather than something that must be maintained.

The organisations adapting most effectively recognise this distinction. They stop looking for the perfect message and start designing for consistency. They accept that clarity is reinforced gradually, not announced dramatically. This does not mean avoiding change. It means distinguishing between evolution and reinvention. Between adaptation and reset.

In a market that interprets every signal, stability itself becomes a signal.

9. A different kind of response

Taken together, these shifts point to a simple but uncomfortable conclusion.

The challenge facing B2B content today is not effort. It is coherence.

Most organisations are not short of ideas, channels, or activity. They are short of mechanisms that protect clarity over time — especially when commercial pressure, platform change, and internal complexity collide.

This is why the most effective response to the current environment looks counterintuitive.

It is not faster.
It is not louder.
It is not more inventive month to month.

It is steadier.

The organisations adapting successfully have accepted that credibility cannot be rushed, automated, or installed through one-off initiatives. It must be stewarded. That stewardship requires rhythm, judgement, and the discipline to reinforce what matters long enough for it to land.

This is also where many capable teams struggle.

They sense that something has shifted. They feel the diminishing returns of volume. They recognise that buyers are harder to reach and slower to convince. But without a clear alternative, they oscillate between bursts of activity and periods of doubt.

Looking ahead, this emphasis on clarity becomes even more critical. Gartner now predicts that by 2028, up to 90% of B2B purchasing decisions could be influenced or executed by AI agents acting on behalf of buyers.

In such an environment, structure, consistency, and clarity of intent are not simply brand virtues — they are prerequisites for being interpreted, summarised, and cited at all.

What's missing is not effort, nor intent. It is structure.

A structure that allows clarity to compound rather than reset. A structure that absorbs learning without triggering overreaction. A structure that prioritises continuity over novelty.

Importantly, this structure does not begin with tools or tactics. It begins with leadership intent.

Specifically, with a small number of truths that the organisation is prepared to stand behind publicly, consistently, and calmly. Everything else — content, platforms, formats — becomes an expression of that intent, rather than a series of disconnected responses to external noise.

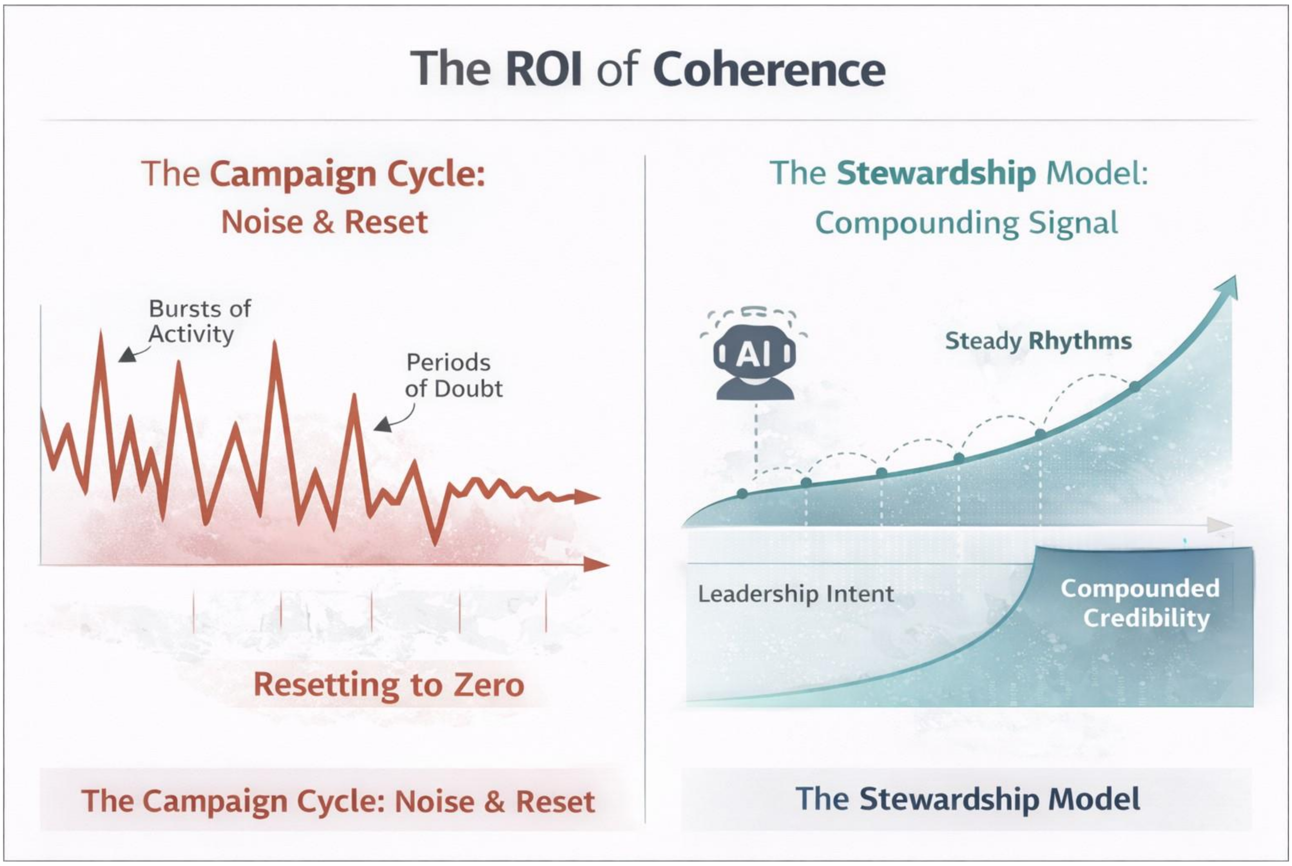
This reframes the role of content entirely.

It is no longer something that sits alongside the organisation's strategy. It becomes part of how strategy is expressed, reinforced, and tested in the open. Over time, this creates a compounding effect. Buyers encounter the same underlying ideas in different forms, in different places, across different moments — and recognition builds.

In a market saturated with activity, that recognition is rare.

The implication is not that organisations should say less. It is that they should say fewer things more deliberately. Not because the market demands silence, but because it rewards clarity.

This is the defining shift in B2B content marketing: from output to stewardship, from campaigns to continuity, and from noise to signal.



10. What comes next (without pitching)

This paper has intentionally stopped short of instruction.

Not because the need for action is unclear, but because action taken too quickly — without design — is often what creates the very fragmentation this paper describes. In a saturated environment, the risk is not doing nothing. It is doing the next thing reflexively.

The organisations that adapt most effectively do not begin with tools, channels, or tactics. They begin by designing the conditions under which clarity can compound.

That design work typically focuses on three areas.

Rhythm.
Not campaign cadence, but a sustainable pace of presence that reinforces recognition over time. A rhythm that allows learning to accumulate, rather than resetting attention with each new initiative.

Stewardship.
Clear ownership of narrative intent at leadership level. Not to control expression, but to protect coherence — ensuring that what the organisation stands for remains recognisable as it travels through people, platforms, and moments.

Insight over reaction.
The discipline to observe before responding. To allow patterns to emerge. To distinguish between noise and signal, and to adapt deliberately rather than impulsively.

Designing for these conditions does not require immediate execution. It requires reflection, alignment, and a willingness to prioritise long-term confidence over short-term reassurance.

This paper forms part of a broader body of Oak thinking developed in response to the same shift it describes: the move from content as output to content as evidence; from campaigns to continuity; from volume to value proof.

Some of that work explores how organisations design for rhythm and coherence in practice. Some examines how leadership intent translates into visible confidence over time. Others look at how insight is gathered, tested, and reinforced without creating additional noise.

None of those responses are a starting point on their own.

The starting point is understanding the shift — and deciding, deliberately, how your organisation wants to be recognised within it.

Appendix: Key Evidence & Market Signals

Supporting the Shift in B2B Content Marketing

This appendix summarises selected, high-confidence market evidence that reinforces the arguments made in this whitepaper. It is not intended as a comprehensive research review, but as reassurance that the observed shifts are **structural, measurable, and already underway at scale**.

How this appendix should be used

- Optional read for CFOs, COOs, CROs, and analytically minded board members
- Not required to understand the main whitepaper
- Designed to reassure, not persuade

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1. Authority Has Decentralised — Measurably

Finding
Recent B2B research indicates that **61% of brands report higher ROI from micro-influencers and subject-matter experts** than from large, centralised analyst or macro-influencer voices.

Why this matters
This validates the move away from a single "brand voice" towards distributed, human credibility. Authority is increasingly earned through proximity, relevance, and lived expertise rather than broadcast reach.

Commercial implication
Investment in centralised messaging alone is unlikely to compound trust. Credibility now forms through patterns of aligned human expression over time.

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2. Platform Behaviour Penalises Traditional Distribution Models

Finding
Platform analysis shows that **external link-led posts typically experience a 25–35% reduction in organic reach** compared to content that delivers its value natively within the platform.

Why this matters
Many organisations believe they are visible because they are active. In practice, their content may be systematically deprioritised by distribution mechanisms beyond their control.

Commercial implication
Content that relies on outbound clicks may appear quieter and less consistent to the market than internal activity metrics suggest — increasing the risk of being misunderstood despite effort.

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3. Buyers Actively Avoid Early Sales Engagement

Finding
Up to **75% of B2B buyers report a preference for rep-free purchasing experiences**, where they can explore and evaluate independently for as long as possible.

Why this matters
This shifts content from a supporting marketing function to a **primary decision surface**. Buyers increasingly form confidence, shortlist options, and eliminate alternatives before any sales interaction occurs.

Commercial implication
Content quality, coherence, and consistency now directly affect pipeline quality and sales efficiency — not just top-of-funnel activity.

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4. The Rise of Machine-Mediated Buying Decisions

Finding
Industry forecasts suggest that by **2028, up to 90% of B2B purchasing processes may be influenced or handled by AI agents** acting on behalf of buyers.

Why this matters
Authority is no longer interpreted only by humans. Content is increasingly summarised, categorised, and cited by machines before it is ever consciously read.

Commercial implication
Organisations without clear structure, stable narrative intent, and consistent positioning risk becoming less visible — or misrepresented — in machine-mediated decision environments.

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5. The Financial Risk of Incoherence

Taken together, these signals point to a single financial risk:

When clarity does not compound, cost does.

Common downstream effects include:

- Longer sales cycles
- Increased cost of acquisition
- Higher pre-sales effort
- Pricing pressure driven by misunderstanding
- Leadership time spent re-explaining fundamentals

These costs rarely appear as line items. They show up as friction.