PAST, PRESENT, AND FUTURE STEPS TOWARD INDUSTRY-WIDE MARKETPLACE PROMOTION OF CERAMIC TILE

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ABSTRACT

In 2015, an opportunity and a threat were presented to the ceramic tile industry. First, a market opportunity was created by *60 Minutes*, an American television investigative journalism broadcast, where a story on flooring containing toxic formaldehyde increased awareness, concern, and need for a healthier and safer home. Second, the luxury vinyl flooring sector created a perceived competitive threat with its growth in residential and commercial markets, and significant projected growth over the forecast period 2015-2022.

With both an important market opportunity and a growing perceived threat for ceramic tile, the North American tile industry developed a comprehensive campaign strategy platform called Why Tile®. The objective of Why Tile was to educate and promote the benefits of ceramic tile over other surface choices, and showcase the various uses/applications of ceramic tile to consumer and design professional audiences.

The Why Tile campaign was launched in 2017, deploying numerous online tools for manufacturers, installers, distributors, retailers, and industry associations to provide consistent promotional and educational information worldwide. The Why Tile campaign maintains strong relevance to the global tile industry with a focus on ceramic tile's design, health, wellness, and sustainability benefits.

Key topics communicated in this paper include the following:

- The importance of industry-wide promotion
- Search engine optimization tactics
- Opportunities for future industry-wide communication and education on sustainability and embodied carbon

1.0 THE NEED FOR INDUSTRY-WIDE PROMOTION

In 2015, the Ceramic Tile Industry faced two factors creating the need for industry-wide information and messaging. First was a market opportunity created by a *60 Minutes* investigative story that increased awareness and concern about the need for a healthy and safe home. Secondly, the perceived threat of Luxury Vinyl Tile (LVT)/Luxury Vinyl Plank (LVP) growth in the flooring market.

The catalyst event occurred on March 1st, 2015, when *60 Minutes [1]*, an American television investigative journalism broadcast, aired a segment raising concerns over chemicals used in Lumber Liquidator's laminate wood flooring manufactured in China. The seven-month investigation focused on formaldehyde, a chemical known to cause cancer at high levels, and respiratory issues as well as eye, nose, and throat irritation at lower levels [2]. The investigation found that the Chinese-made laminate flooring had formaldehyde emissions that were over six to seven times above California Air Reserve Board's maximum acceptable limits. Some were found close to twenty times above the levels that are allowed to be sold [1].

The *60 Minutes* investigation sparked further national conversations about unhealthy flooring concerns from media outlets including the television talk show Dr. Oz [3], ABC, CBS, NBC, Reuters, Bloomberg, the *NY Post*, and *Forbes*, and reports from *Consumer Reports*, the Centers for Disease Control and Prevention (CDC), and other organizations.

The LVT/LVP flooring category, which had been growing through the 2000's, began to explode in 2012 with the introduction of engineered vinyl click flooring with WPC (Wood Polymer Core, also called Waterproof Core) the first of this new category of LVT products [4]. As seen in **Table 1**, LVT was the fastest growing flooring product category growing 28.3% from 2013 to 2017.

LVT products were heavily promoted as both residential and commercial products, capable of being installed by DIYers and professional installers alike, giving it a broad market appeal. LVT's marketing claims such as "100% waterproof" and exceptional durability, as well as low cost and improved visuals to mimic other flooring options, appealed to both consumers and design professionals/specifiers.

The growing LVT market share combined with growing concerns for home health made it clear that the ceramic tile industry needed to join the conversation for healthy building and communicate ceramic tile's clear advantages. The tile industry agreed immediate action was required.

U.S. floor covering market sales value
(IN MILLIONS OF MANUFACTURERS' DOLLARS)

Product Sector	2013	2014	2015[R]	2016[R]	2017[P]	Percent Change
Carpet & area rugs	$10,511[R]	$11,269[R]	$11,280	$11,414	$11,577	1.4%
Hardwood flooring	2,781	3,337	3,504	3,423	3,490	2.0
Ceramic floor & wall tile	2,642	2,882	3,065	3,407	3,639	6.8
Laminate flooring	922	932	950	956	988	3.3
Luxury vinyl tile (LVT)[1]	895	1,109	1,405	1,869	2,397	28.3
Vinyl sheet & floor tile[2]	1,495	1,490	1,427	1,572	1,644	4.6
Other resilient flooring[3]	250	260	275	290	297	2.4
Stone flooring[4]	1,175	1,237	1,310	1,398	1,462	4.6
Total Sales	$20,671[R]	$22,510[R]	$23,216	$24,329	$25,494	4.8%

R= Revised
P= Preliminary

Source: Catalina Research
1 LVT includes WPC and hybrid floors if the flooring is primarily made of vinyl
2 Other vinyl tile includes VCT and other vinyl tile not classified as LVT
3 Cork, linoleum, non-vinyl plastics and rubber
4 Natural stone. Excludes manufactured and engineered stone

Table 1: *Source: Floor Covering Weekly Statistical Report 2017*

2.0 WHY TILE® CAMPAIGN

When ceramic tile manufacturers reviewed their individual marketing efforts, a glaring gap was identified. Every manufacturer advertised and promoted their various product line characteristics—names, colors, sizes, prices—with no mention of tile's health or sustainability benefits. Marketing executives were under the assumption that consumers and specifiers knew tile's benefits. However, this assumption proved incorrect given the significant rise in LVT sales replacing tile in traditional ceramic tile applications.

From a customer standpoint, LVT was being positioned as a less expensive substitute for ceramic tile, wood, and stone.

At this point, the tile industry's marketing approach only addressed potential customers who knew they wanted ceramic tile and were simply debating which product to purchase/specify. To enter the flooring conversation and challenge LVT, taking advantage of the raised awareness of unhealthy flooring, a new marketing strategy was required. This strategy needed to enable consumers and design professionals researching flooring options to choose ceramic tile due to tile's advantages over other flooring, and to empower marketers and sellers to promote ceramic tile not just for aesthetics, but because they also understood ceramic tile's health, durability, and sustainable attributes.

These objectives culminated in the tile industry's development of a comprehensive, top of the marketing funnel industry campaign strategy. The campaign needed to provide the tile industry with a vehicle for having conversations highlighting ceramic tile as a natural and healthy choice for flooring, along with tile's design benefits.

The campaign would allow the industry to speak as one voice (much like the California Milk Processor Board's *Got Milk* advertising campaign [5]), amplifying consistent ceramic tile messaging points, strengthening customer understanding and retention that ceramic tile is a superior choice over other flooring and surface material options.

This strategic concept put into action a digital campaign platform to:

- Represent the entire ceramic tile industry
- Provide top of the marketing funnel information to those researching and considering a new floor or surface material
- Host industry information, including information that manufacturers may not be able to present on their individual websites
- Promote the research-supported advantages of ceramic tile and make this information readily accessible to anyone
- Supply information on a wide range of ceramic tile applications in a design-inspired environment
- Leverage on-line search practices and tailor content around existing conversations to drive traffic
- Highlight trends and manufacturing advancements
- Take the guesswork out of product selection through engaging content
- Inspire consumers and design professionals/specifiers with a curated library of images and various applications for using tile
- Attract consumers and trade customers alike to learn more
- Provide a tile buying guide to aid in the tile selection process that supports the advantages of ceramic tile (for use by consumers as well as for design professionals to share with their clients)
- Educate consumers and design professionals so that they become lifetime tile customers

The tile industry named this campaign Why Tile®, a multi-reach platform to showcase the uses of ceramic tile, and to establish firmly in the minds of consumers and design professionals, ceramic tile as a preferred material. WhyTile.com, the largest campaign asset, would be designed to provide high level information as well as opportunities and resources that provide more extensive content on all topics. In addition to the website, there would also be articles, guides, infographics, case studies, design gallery, blog posts, downloadable references, use calculators, and social channels to amplify the Why Tile® messaging.

Because Why Tile is about ceramic tile education and inspiration for the entire industry, Why Tile established the guiding principle to remain product neutral by not providing product, manufacturer, or country of origin. Additionally, Why Tile would not be a path-to-purchase website.

3.0 ACTING ON THE DATA

To enable optimal campaign planning, The Tile Council of North America (TCNA) [6] commissioned a quantitative, big data market research project with a marketing data analytics firm (MDAF) to produce detailed audience segmentation recommendations and provide competitive landscape and market research insights. Some of the major questions TCNA wanted the research to address were:

- What are the perceived values of different flooring categories (per consumer age group)?
- What are the most used searched terms when shopping for flooring?
- Do the four Why Tile messaging tenets (design attractiveness, easy care/durability, healthy, and legacy of design/craftmanship matter to the customer?
- What are the barriers to a tile purchase?
- What lead value can we own and claim for ceramic tile?
- What spaces are using tile and how has this changed over time?
- What hashtags are being used in the flooring social networks, who are using them, and how often?

The market research project comprised over eighty queries across four data sources resulting in nine reports of data totaling over 200 pages. The reports represented data from over two decades of internet use from over 85% of the U.S. and Mexican adult population as well as 82% of the Canadian adult population, all major North American social channels, competitive search engine optimization/search engine marketing (SEO/SEM) metrics along with competitive display metrics, and 300+ million websites scanned for brand and topic tends. Cutting-edge Natural Language Processing was then leveraged to analyze the results.

The research findings answered most of the questions, but also found many other valuable insights. A major finding was that ceramic tile had a **lack of real awareness**.

Tile was not unknown, but its value appeared to be.

Therefore, with a great need to get explicit, an online awareness imperative was recommended. Based on the data, the MDAF suggested a SEO campaign as the optimal approach. Moreover, the SEO campaign needed to be supported with external link building to enhance domain authority to ensure the information was viewed by our targeted audiences.

It was also concluded that using WhyTile.com as the main online awareness campaign asset was optimum because it removed the cognitive dissonance of being pitched by a brand. Investments for the campaign focused on compelling Why Tile awareness information, with educational facts targeting contractors and installers, along with educational and inspirational content targeting consumers and design professionals.

The following guidelines were also recommended:

- **Make tile new:** New words. New ideas. Produce content that is clever, evocative, and on-trend.
- **Equate tile with design perfection:** Tile should be the benchmark by which all other flooring is evaluated.
- **Tile is worth it:** When it comes to things you use every day, durability matters.

The MDAF also offered that industry-wide awareness messaging must be simpler, stronger, and more creative versus the current online tile conversations that were very product-centric. And, the same messaging should be used with distribution channels and customers. In looking at the research findings, for the U.S. and Canada, the recommended action was to focus messaging on **health and the environment,** and **durability and worthwhileness**. In Mexico, the action would be to raise tile's profile over marble, and messaging should focus on **versatility and easy care**.

Additionally, the data showed people followed product use cases (tile floor, countertop, backsplash, etc.) and not products. It was therefore recommended that the awareness campaign segment information by use of tile and not create detailed target audience personas.

4.0 LEVERAGING SEO TACTICS

Search engine optimization (SEO) strategically curates information and resources on a website to optimize what users are looking for. This optimization means search results raise a website higher in search results, bringing more users to visit a website. This kind of traffic is the least expensive source of website exposure in digital marketing and more effective than paid search advertising, making SEO investments a more sustainable long-term tactic for WhyTile.com to adopt. Although paid advertising results in traffic that converts an average of 3% more often than paid traffic [7], it is also a common source of fraudulent traffic — one in four paid advertising clicks in 2022 were fraudulent (bots, competitors, or click farms), an estimated $40 billion in lost revenue for advertisers that year [8].

In addition:

- 70-80% of users only focus on organic search engine results. That is, they ignore advertising [9].
- SEO generates almost six times better results than advertisements in search engines [10].
- Content marketing gets three times more leads than search engine advertising [11].
- 70% of people reject banner ads on mobile, and ad blockers on those devices have increased 90% year over year [12].

The Why Tile campaign also presented an opportunity to leverage special SEO tactics due to using flexible content strategies, a focus on website user experience, link building, and the lack of advertising. The campaign strategy, effectively the "Got Milk?" of the flooring industry, facilitated a natural and organic approach to SEO that followed Google's Search Quality Evaluator E-A-T guidelines [13].   Progress was clear on WhyTile.com's SEO within the first year of the campaign; SEO traffic increased 125.17% YoY, and 841 keywords also improved to the top three results within the first year, a 213.8% improvement from the previous year.

These special SEO tactics were in three major areas, all of which are transferable to any tile industry websites interested in growing their search engine visibility without the use of interruptive ads or expensive keyword targets.
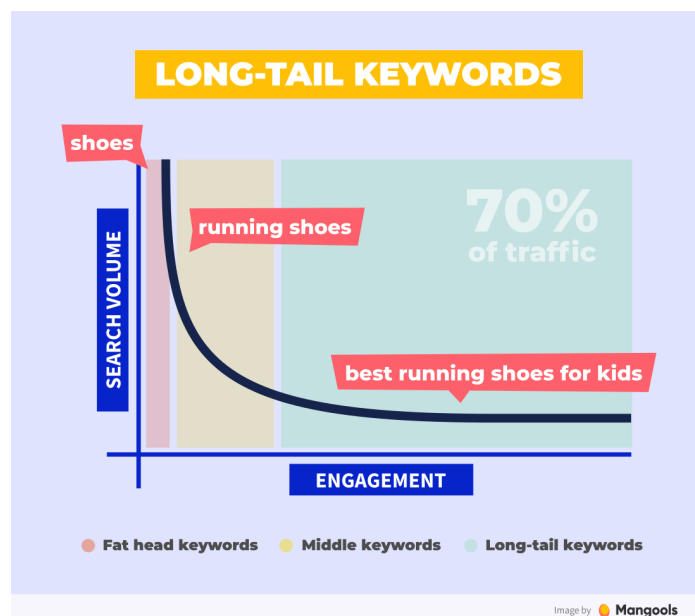
FOCUS ON LONG TAIL KEYWORDS

Traditional SEO guidance suggests that the goal of SEO is to identify high volume keywords (also called "fat head" keywords) that are the most popular searches in search engines such as Google. The presumption is that, by appearing as high as possible in search results, websites are more likely to receive traffic from search engines. For example, the keyword "tile" (Site Visits 110,000, Keyword Difficulty 90 [14]) immediately seems like a superior target compared to "horizontal tile in shower" (Site Visits 50, Keyword Difficulty 22) to increase website traffic from search engines.

But the WhyTile.com strategy completely ignores high volume keywords and instead focuses efforts on keywords that are at least four words long—long tail keywords. There were three reasons for this decision:

1. For Why Tile, the same resources invested in long tail keywords yielded better results than when invested in fat head keywords.

2. Long tail keywords have higher website visitor engagement than fat head keywords, because visitors are more specific in their search (and Why Tile writers can craft information more specific to the long tail keyword).

3. 91.8% of all Google searches are long tail keywords [15]. The median search volume for a keyword in Google is 10 — keywords above this are above median and represent appropriate targets.

Figure 1: A visualization of the increased website visitor engagement from fat head keywords to long tail keywords

Overall, long tail keywords [16] helped WhyTile.com achieve their traffic goals, even when competing against large brands such as Home Depot, Lowe's, Floor & Decor, and HGTV. These brands focus on fat head keywords and leave long tail keywords untapped. WhyTile.com was able to fill this void and create information optimized for traffic generation. As an added benefit, long tail keywords also helped WhyTile.com target a more specific audience, avoiding competition with our industry tile sales partners.

AVOIDING ADS IMPROVES SEO

As early as 2010, and confirmed in a 2018 announcement from Google [17], website load speed is a factor in search engine rankings. And website advertisements, including Google ads, are known to impact website load speed. One 2022 Request Metrics study compared major website load speeds with and without Google ads to test the impact, with the ad versions loading 1.2 – 5.3x slower than the versions without ads [18].

Load Performance Results

| Site	No Ads	With Ads	Impact
espn.com	2.9s	3.5s	1.2x slower
nytimes.com	2.5s	3.5s	1.4x slower
cnn.com	7.0s	16.7s	2.4x slower
foxnews.com	4.6s	16.2s	3.5x slower
wsj.com	2.8s	14.8s	5.3x slower

Load Times With and Without Google Ads

Figure 2: Major website impact with and without Google Ads (July 2022 RequestMetrics Test)

Unlike websites such as ESPN.com and CNN.com, WhyTile.com does not use advertisements to generate revenue. Therefore, Why Tile did not face the same barrier that many websites face — *"How can I maximize ad revenue, and generate as many impressions as possible, without interfering with the experience of my readers?"*

ORGANIC LINK BUILDING THROUGH INTELLIGENT CONTENT CHOICES

Backlinks are one of the most important Google ranking factors in SEO, representing ~14% of the weighted ranking factors used in ordering search results.
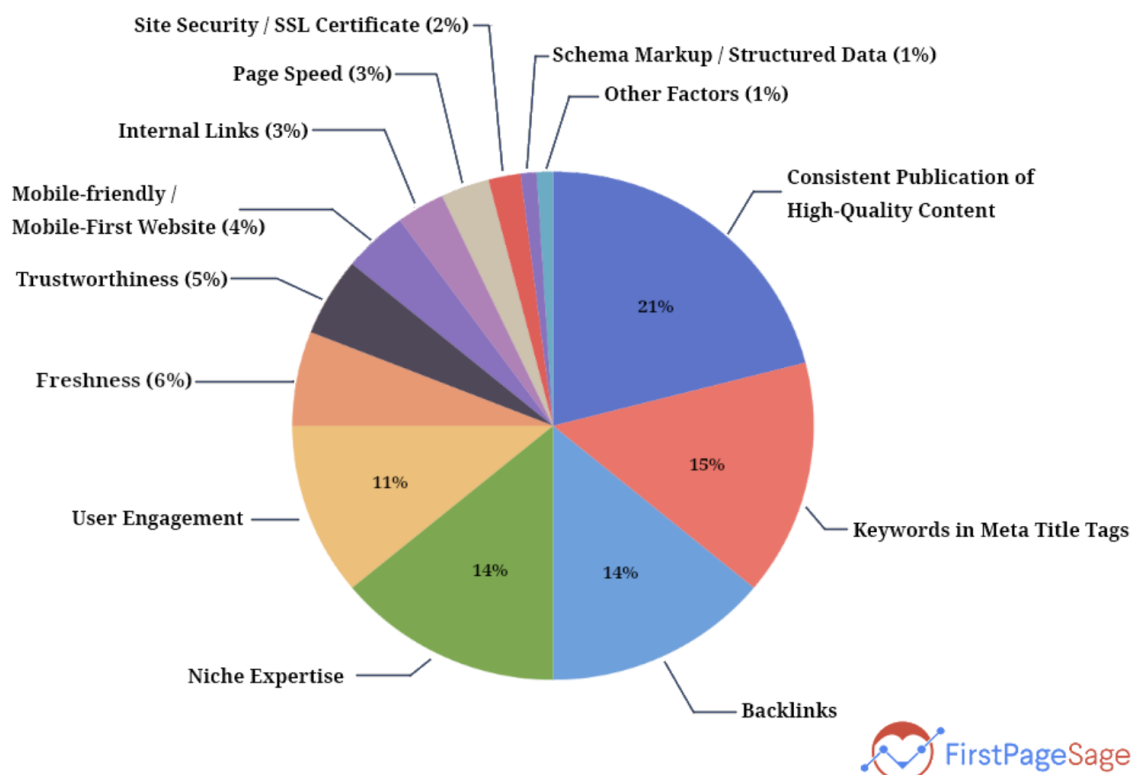
Figure 3: *Weights of each Google ranking factor group from a 2023 FirstPageSage study*

With limited resources, the WhyTile.com SEO team needed to identify tactics that passively resulted in backlinks to our content, a process called link building [12] vs. utilizing digital marketing resources and dollars to purposefully create links to Why Tile content.

Initial links from websites such as Smithsonianmag.com, ApartmentTherapy.com, and Curbed.com were earned by carefully planning our content strategies to appeal to websites that regularly link to other websites after discovering content in search results. This type of content was invested in significant sections of the Why Tile website such as the Heritage section [19], a comprehensive regional history of tile, and content covering notable tile installations [20].

5.0 THE EVOLUTION OF WHY TILE: SUCCESS AND ONGOING INITIATIVES

The Why Tile campaign was an important step for the industry to come together and collaborate on a public-facing initiative. The campaign filled three important gaps for the industry:

1. Capture potential customers' attention when searching for flooring and other surface coverings options by using high-level, nonproduct messaging based on science and research versus marketing hype
2. Provide education on the benefits and advantages of ceramic tile over other materials that the tile industry did not realize were unknown to consumers and design professionals
3. Create a compelling story to inform the healthy flooring conversation and challenge LVT manufacturer and distributor stated marketing claims

To stay relevant, the Why Tile campaign continues publishing trending information for industry-wide communications and education. In addition to adding new tile style and design pieces, content on world-wide trending health, safety, and environmental topics continues to be developed.

For example, during the COVID 19 pandemic, there was a heightened concern for health and hygiene. In response to this concern, Why Tile featured a pandemic-inspired blog series focusing on the health and hygienic properties of ceramic tile. Additionally, a Ceramic Tile Hygiene Guides section was created on Why Tile showcasing ceramic tile as one of the most healthy and hygienic surface covering options [21].

Additionally, today's increased environmental awareness and concerns, along with the climate and environmental focus of the current U.S. administration, has provided an ideal opportunity to tell ceramic tile's sustainability story — the health and environmental benefits of ceramic tile. A recently added Sustainability Guide section to WhyTile.com [22] organizes the sustainability advantages of using ceramic tile and allows this rapidly evolving topic to be updated quickly. For example, the embodied carbon conversation is a trending topic, and ceramic tile related embodied carbon information has been added to the Sustainability Guide section. More embodied carbon information is under development, including content focusing on the importance of using cradle-to-grave data when calculating embodied carbon versus limiting information to cradle-to-gate data.

Because the Why Tile strategy has been successful, the industry continues to invest and support the campaign. SEO metrics and domain authority continue to improve year over year, raising awareness of tile's benefits and numerous applications with key target audiences, including consumers and design professionals. The campaign has also become a valuable training tool for manufacturer sales representatives, distributors, retailers, and tile installers. Additionally, the industry has realized a collective benefit of having a common voice with consistent messaging used for individual company websites and marketing collateral/communications.

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