ANALYSIS OF THE COMMUNICATION STRATEGIES OF THE CERAMIC SECTOR IN NON-CONVENTIONAL MEDIA

Rocío Blay Arráez, Mayte Benlloch Osuna

Universitat Jaume I - Faculty of Human and Social Sciences
Department of Philosophy, Sociology, Audio-visual Communication and Publicity
12071 Castellón - rblay@fis.uji.es - benlloch@fis.uji.es

1. GENERAL INTRODUCTION TO THE RESEARCH.

After a research study conducted in 2004 on communication in the press by companies from the ceramic sector, and after studying their adequacy for the target public, the need has arisen (motivated by the same interest as in the previous study, i.e., the need to adapt to the present environment, characterised by continuous and increasing competitiveness demands on the sector, the own configuration of the ceramic industrial fabric and the new environmental demands, among other variables), also to review what other communication actions have been conducted in non-conventional media, actions in the advertising jargon termed *below the line*, by companies from the ceramic sector, and whether these reflect the appropriate implementation of the communication strategies that we consider could be effective for the attainment of communication objectives – that would have to be specifically made explicit in the first place – and thus to attain the overall objectives of the companies in the sector.

In this way, and step by step, it is sought to determine where they lie in *below the line* communication and it will be attempted to detect the strengths and possible weaknesses that must be palliated in order to achieve the necessary positioning for the ceramic companies, in order to enable them to obtain the necessary competitive advantages to achieve the proposed objectives, and particularly to assure their growth and/or survival in times of crisis.

The initiative has arisen, originally, from *Idearium* (first publicity Awards in the ceramic sector), a competition promoted by the journal *Azulejo* based on which an analysis has been made of all the communication actions in conventional mediums, concretely in the **written press**, carried out by the ceramic sector in this last year, with a view to verifying their degree of adaptation to the communication needs of the different target publics (as 'clients').

Now the characteristics of this type of communication in the sector have been recognised and analysed (where the communication actions of more than 50 ceramic advertisers were analysed), it is sought to extend the study by analysing the *below the line* actions that the most prominent ceramic advertisers have performed.

The main reasons for this new particular study, are, in the first place, the high relative weight of *below the line* actions in budget terms, within the communication plans of sector companies and, secondly, this study involves greater knowledge of reality in regard to the communication of the sector companies, enabling comparison of the different techniques (*above the line* and *below the line*) of communication implemented by the sector companies and, thus, to see if the new tendencies, for example of organisation of events, trade fair attendance, etc., are being incorporated in their design and implementation.

2. DESCRIPTION OF THE SAMPLE

In this case, the total number of studied companies encompasses those which, on the one hand have conducted some type of communication action in conventional media during 2004, (already analysed in the study mentioned, a matter that would favour comparability), and on the other hand, the results obtained in the various research works undertaken previously by the authors of this communication, and which have been based on interviews held both with private persons and with professionals from the sector, in order to establish the national tile brands with the greatest recognition and best rating.

Obviously, in most cases this involves companies that according to the identification criteria, used to classify them in small, medium-sized or large companies, would also be set in different segments. For example, if we considered criteria qualitative (Moneva, 1993), as the degree of identification or independence between the property and the administrators, we would speak clearly of SMEs, since in most cases companies are involved with a clear pattern of management of a family nature, where manager and owner are one, and although professionals have also been incorporated with company growth, it is the proprietors who direct and make the decisions, based more on their intuition, their experience and their own criterion, than on formal foundations. This makes for more rigid and less flexible business structures.

Analogously, if we considered criteria of a quantitative character, such as the number of employees, they could be considered outside the SME classification. Besides this, it seems clear that their action policies in all the business fields (including also communication management), as a result of these consulted and previously conducted studies, are framed within the actions traditionally performed by SMEs.

However, the fact that we study the *below the line* communication actions performed by the companies with a greater relative weight in the sector, and although it is not at all a representative sample of the real size of the rest of companies that make up the sector, where approximately 90% have an average of 25 to 50 workers, it will enable us, without a doubt, to know what is being done well, and to what extent this can be improved upon, to help in general the sector position itself correctly, within a highly competitive and ferocious market in regard to prices.

3. INTRODUCTION TO THE ANALYSIS METHODOLOGY USED

For the attainment, creation, development and effective management of these intangible assets that generate sustainable competitive advantages in time, and knowing the present context, communication takes on total importance, something which the studied companies are beginning to take into account, but where we have verified that there is still a long way to go. The companies analyzed, as already remarked previously, base themselves, also in the communication management, on parameters traditionally used by SMEs. For the analysis of the *below the line* actions performed by the selected companies, we base ourselves on a classification of the parameters that Professor Maribel Reyes uses in her article *Communication management in the Spanish SMEs*, which will enable to us to establish comparisons and highlight the degree of coherence and adaptation between the communication actions (both *below the line* and in advertising in conventional media already studied), the communication strategies and the apparent target public.

After reviewing the *above the line* and *below the line* communication actions performed by the companies selected for the study, we can state that, in general, they typically continue using an SME communication development and management pattern, and centre their investment efforts in communication in those actions described by Professor Maribel Reyes in her article (referring to SMEs). As important points we may indicate that:

- The development of *below the line* communication actions is more extensive than the communication actions in conventional media. If we take into account the relative weight of the actions in regard to budget, we can conclude that the amounts going to communication in non-conventional media are greater than in conventional media, and as a whole we believe they are smaller than in other sectors, in which companies invest as much in conventional mediums as in *below the line* actions (furniture, toy sector, …).
- The *below the line* actions analysed (in contrast to what has happened in most campaigns in conventional mediums – in the press – analysed previously) display a differential strategy according to the target public involved. We could classify different specific actions for particular publics, (trade fairs for distributors, actions of sponsorship for the client or actions of patronage for the closest community…).
- Excepting some particular case, often the synergies favouring the company brand are not picked up, and therefore, those in favour of the correct development in terms of positioning of the whole sector, which could be taken advantage of if there were a clear communication strategy, which would enable a coherent and more appropriate performance of the different communication actions in conventional media (presses, radio, TV), as well as

in non-conventional media. We must, however, make an exception for some cases, which do display coherence between the different actions undertaken.

- Taking into account the target public described previously, and given the increasing importance of other groups which have traditionally not been taken into account to the same extent, we see that new media (Internet) and new platforms exist which, although they have begun to be used, have not yet been developed efficiently by the companies in the sector.
- We miss, in almost all the analysed cases, proper management in regard to the communication of organised events (which have very attractive characteristics at media level, quite consistent with the image that the ceramic company should transmit, in our view), and which could be source of *publicity*, i.e. non-paid publicity, which could redound positively to the image of the studied companies, and to the image of the sector in general.
- Surprising, however, are the new *below the line* actions conducted by some of the selected companies, which are doubtless of value and have an innovative character, but which, despite being pioneering companies in this new type of communicative action, should have taken more advantage of the media repercussion that could have contributed positive values to the image of the company, and would possibly have allowed making the investment involved highly profitable.

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