New marketing strategies from 1992 onwards
a rationalized approach

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MERCHANT SHIP MARKETING SEMINAR

NEW MARKETING STRATEGIES FROM 1992 ONWARDS
A RATIONALIZED APPROACH

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INDEX AND LIST OF FIGURES

NEW MARKETING STRATEGIES FROM 1992 ONWARDS A RATIONALIZED APPROACH

SUMMARY

Following a deterioration in the sales situation evident at the end of 1991, the AESA group thoroughly re-analyzed its marketing strategies, objectives and practices. A new marketing policy emerged as a result and has been implemented during 1992 and afterwards. This presentation describes the key elements of the new policy which emphasizes the orientation towards the customer.

INTRODUCTION

The previous presentation has described the evolution of the marketing strategies and activities in the period 1987-91 and the results obtained. Serious marketing problems were detected at the end of this five-year period and a complete marketing re-orientation was decide at the end of 1991. The situation analysis indicated four key problem areas:

1. A change in market positioning
2. A deterioration of the customer base
3. A reactive marketing attitude
4. An unfocused product-mix policy

The new marketing policy was intended to correct these deficiencies and to modernize the overall operation of the group's commercial department, in charge of both marketing and sales activities.

KEY ELEMENTS OF THE NEW MARKETING STRATEGY

The first priority was to recover a good market positioning, lost in 1989 when low-price leadership was abandoned. This was an immediate need, and there was no time to build-up the fundaments for a market positioning based on differentiation or segmentation. In consequence, a first decision was to move back temporarily to a **low-price positioning** and start quoting very competitive prices. The reference would always be "the fair market price" for the given ship, which is not necessarily the lowest price in the market but comes very close to it. Given the good cost control results in recent years, and the favourable currency exchange rate evolution in late 1992 and early 1993, and in spite of vanishing subsidies, this low-price policy does not come in drastic conflict with a reasonable profit & loss policy.

The realization of the many new marketing activities needed to carry out in a short time led to the decision of concentrating some of the best Head Office marketing resources in these activities. Most of the relevant personnel were previously involved in design work and product management. It was decided to terminate these activities at the Head Office, and **transfer all design activities to the Technical Offices located at the yards.** The best people left free by this decision was then dedicated to the new marketing activities, together with some of the sales personnel on a part-time basis.

AESA does not intend to be a mainly-low-price shipbuilder forever. The idea is to abandon this positioning as soon as another good positioning is feasible. Given the large size of the company, it has been considered that pure segmentation, i.e. devoting the marketing efforts to a segment of the market alone, ship-type or customer type, is not feasible. However, the favourable evolution of the cost, production and quality[2] aspects in recent years show that strong differentiation factors may become possible in the mid-term. Therefore, a reasonable alternative is to seek a broad market positioning based on positive differentiation versus competitors. The chosen differentiation factors are **quality and service**, which will be appreciated better by customers with whom a stable relationship is established, i.e. customers who buy new ships often.

Making these quality and service factor work will then require the establishment of regular contacts with a potential customer base. These will be leading shipowners and operators of different ship types, based worldwide and having relatively large fleets. These shipowners will become the target of an active **marketing contact campaign** by means of direct visits by AESA marketing representatives. Offering customers quality and service, the group must put itself in a position to deliver these attributes. The company will initiate a program to ensure that a demanding **customer satisfaction** goal is met.

Closer relationships with customers will require discussing specific products more often, including possibly the joint development of new ship generations. The necessary engineering resources could become prohibitive and some **product-mix focusing** is mandatory. Studies will be carried out to determine which market segments are less promising and may be abandoned at lowest commercial risk.

The new customer orientation and product-mix focusing will become the subject of an **image campaign** to broaden the impact of the direct contacts with shipowners and to reach those potential customers not directly visited due to their smaller size or remote location.

Finally, a **quantitative control system** was established to monitor the marketing and sales activities. Indicators were defined that will warn of dangerous deviations in time for corrective action to be taken towards the full compliance of sales and market promotion objectives.

In summary, six major action lines are being taken:

1. New temporary market positioning regarding price.
2. Commercial department re-organization
3. External orientation to customer by direct contacts.
4. Internal program to achieve customer satisfaction.
5. More focused product-mix policy.

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[2] The Puerto Real yard has reached the most demanding QA level in shipbuilding. It is the first shipyard <u>in the world</u> to receive a "Hull and Outfit" quality assurance certificate from Lloyd's Register Quality Assurance.

6. New image campaign.

The first item is clear enough and needs no further explanation. Some details are added herebelow on the remaining.

NEW COMMERCIAL DEPARTMENT ORGANIZATION

The Commercial Department was previously organized in a large Sales Group a small Marketing team and a large Contract Design Group. The Marketing team has been expanded into a full Group with the incorporation of highly qualified personnel from other company departments. The Contract Design Group has disappeared. The new Commercial Department organization and functions are:

1. Market Promotion Group	- Market Forecasts - Visits to Customers - Product-mix Policy - Image Campaign
2. Sales Group	- Inquiry evaluation - Bid/tender preparation - Contract Negotiations - Customer Service

The technical offices in the shipyards have been reinforced with the transfer of many of the qualified personnel of the former Contract Design Group. All new ship designs are now prepared at these offices.

The total number of people involved today in commercial activities and ship design is similar to previous years, but the geographical and functional distribution is different. The Madrid Head Office is now totally devoted to marketing and sales matters, both types of activity sharing some human resources and having roughly similar manpower dedication.

NEW APPROACH TO CUSTOMER BASE

As indicated above, an active program of visits to potential customers was undertaken from mid 1992. To organize this program the entire customer base was analyzed. It was found that 250 relevant shipowners would cover well the potential markets of AESA. Shipowners were selected on the basis of having large fleets, on a global basis, or being dominant in a ship-type segment, or have previous business relations with AESA, or being located in areas where AESA might enjoy some financial or geographical advantage versus competitors. Countries with a recent history or large newbuilding purchases were also targeted. In total, 15 segments were identified and were grouped in two main categories; free market and special markets.

The target for 1993 is to carry out 360 personal visits to these customers. Visits are proceeding at good pace and results are so far very encouraging.

ACHIEVING CUSTOMER SATISFACTION

Having aimed at a positioning based on quality and service, it is imperative to ensure that customer satisfaction is achieved systematically. Otherwise the effects of the image campaign would be counter-productive.

Customer satisfaction can be built-in each time the customer, or its representatives, are in contact with AESA's. A systematic program is being prepared to identify all these contacts, AESA's persons involved, ditto for customer's, and to determine the key points of customer satisfaction at each of these contacts. Quantitative indicators, linked to relevant best practices, will be set for each major key point. Required customer satisfaction levels will be identified and targets for indicator improvement will be established. Personnel will be trained and motivated accordingly.

Customer satisfaction can be built-up scientifically, it is not the result of innate virtues of the company or its personnel. The ship procurement process is long and gives many opportunities of contact, which makes the task difficult, but not that many people are involved in these contacts, which makes it easier. Likewise, the customer universe is relatively small and can be reasonably reached directly to determine the actual customers' expectations at each key point.

FOCALIZED PRODUCT-MIX POLICY

It is recognized, but will not be discussed here, that product-mix policies can condition the required level of engineering and/or production facilities. Therefore, a completely flexible product-mix, offering all ship-types and size combinations, requires very large engineering resources, very large R&D budgets and costly but under-utilized production facilities. This not being possible in the present corporate strategy context, some limitations must be accepted for marketing purposes. A good product-mix policy will determine where to spend the available resources with better potential results.

In order to make a rational analysis of the product-mix, the ship-type and size spectrum must be segmented. Each segment will then be analyzed in detail. The company's situation regarding each segment will then be evaluated in technical and financial terms. Potential product mixes will be evaluated considering their impact in the group's profit & loss, potential risks and required resources. Optimal choices can be made regarding segments to be abandoned, defended or attacked. Responsibilities will then be assigned for implementation.

In principle, and owing to AESA's facilities, target ships have been divided in two groups: medium size and large size. AESA does not build small ships, except in special cases. About 15 relevant segments or niches have been identified in each of these groups. Therefore, there will be 30 studies to be made, some of which are already underway.

IMAGE CAMPAIGN

The key element of the new image campaign will be the direct visits to owners. This will be supplemented by advertising in trade journals, in order to reach smaller customers and other opinion leaders. The new ads will focus on quality and service as major themes, with the counterpoint of a less commercial and more institutional series of ads against sub-standard shipping.

Paid advertising will be supplemented by presence at major trade fairs, conferences, seminars and other public events. A corporate stand will be installed at major fairs. Papers will be presented at symposia and published in journals. All with the aim of building-up an image of leadership in the shipbuilding industry.

Although not primarily intended with this purpose, participation in international R&D projects will also be capitalized for image build-up.

NEW COMMERCIAL STRATEGY (END 1991)

FROM	TO
- STRONG RELIANCE ON LOW PRICE AND EXCELLENT EXPORT CREDIT	- STRESS ON QUALITY, SERVICE AND STABLE RELATIONSHIP WITH KEY CUSTOMERS
- REACTING TO CUSTOMER INQUIRY	- GOING TO OWNER, TO PROMOTE AWARENERSS AND INQUIRIES, TO OFFER CO-OPERATION
- UNFOCUSED PRODUCT-MIX POLICY	- FOCUS ON PRODUCT-MIX
- DESIGN & MARKETING FUNCTIONS TOGETHER IN SAME DEPARTMENT AT HEAD OFFICE	- FOCUS ON MARKETING AT HEAD OFFICE AND DE-CENTRALIZED DESIGN OFFICES AT YARDS

NEWCOM91

COMMERCIAL STRATEGY
IMPLEMENTATION LINES 1992-94

1. PRICE POSITIONING: OFFER ALWAYS COMPETITIVE (I.E. MARKET) PRICES, OR AVOID BIDDING

2. PROMOTE MARKETING ASPECTS: RE-ORGANIZE MAJOR COMMERCIAL FUNCTIONS INTO MARKET PROMOTION AND SALES. MOVE DESIGN OFFICE TO YARDS.

3. ORIENTATION TO CUSTOMER: SELECT MOST PROMINEN OR PROMISING, VISITING THEM AND ESTABLISHING A PREFERENTIAL RELATIONSHIP

4. CUSTOMER SATISFACTION: IDENTIFY RELATIONSHIPS WITH CUSTOMER WHERE ADDITIONAL SATISFACTION CAN BE BUILT-IN WITH ADVANTAGE VS COMPETITORS

5. PRODUCT-MIX POLICY: STUDY PRODUCT BY SEGMENT. PREPARE STRATEGY OF DEFENSE, ATTACK OR ABANDONMENT. DEVELOP SUPERIOR PRODUCTS, USING CUSTOMER FEED-BACK AND SUFFICIENT ENGINEERING RESOURCES.

6. NEW ADVERTISING AND IMAGE CAMPAIGN BASED ON LEADERSHIP, QUALITY & SERVICE LEIT-MOTIVS

STRATIMP

COMMERCIAL STRATEGY IMPLEMENTATION LINES 1992-94

1. PRICE POSITIONING: OFFER ALWAYS COMPETITIVE (I.E. MARKET) PRICES, OR AVOID BIDDING

2. **PROMOTE MARKETING ASPECTS: RE-ORGANIZE MAJOR COMMERCIAL FUNCTIONS INTO MARKET PROMOTION AND SALES. MOVE DESIGN OFFICE TO YARDS.**

3. ORIENTATION TO CUSTOMER: SELECT MOST PROMINENT OR PROMISING, VISITING THEM AND ESTABLISHING A PREFERENTIAL RELATIONSHIP

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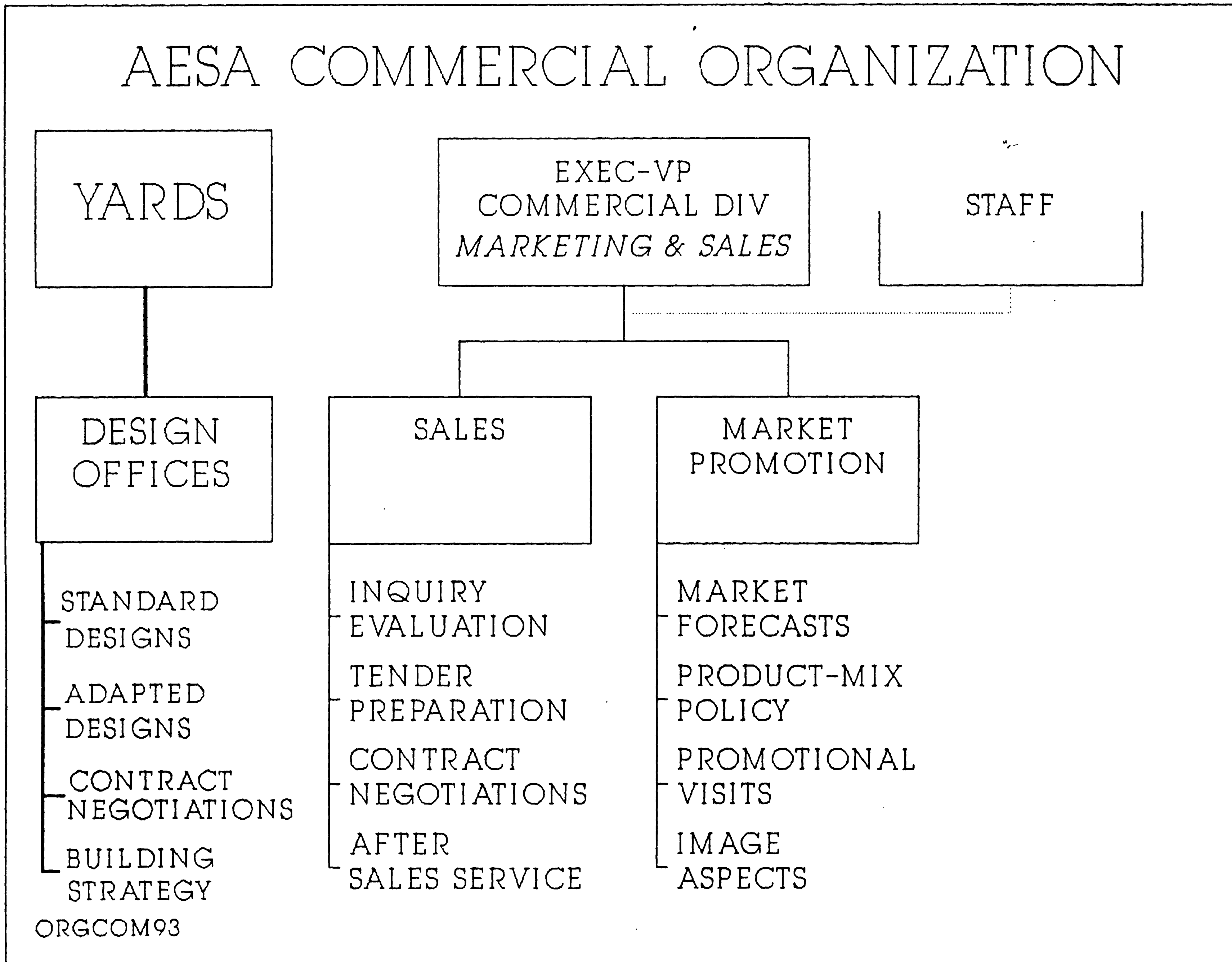
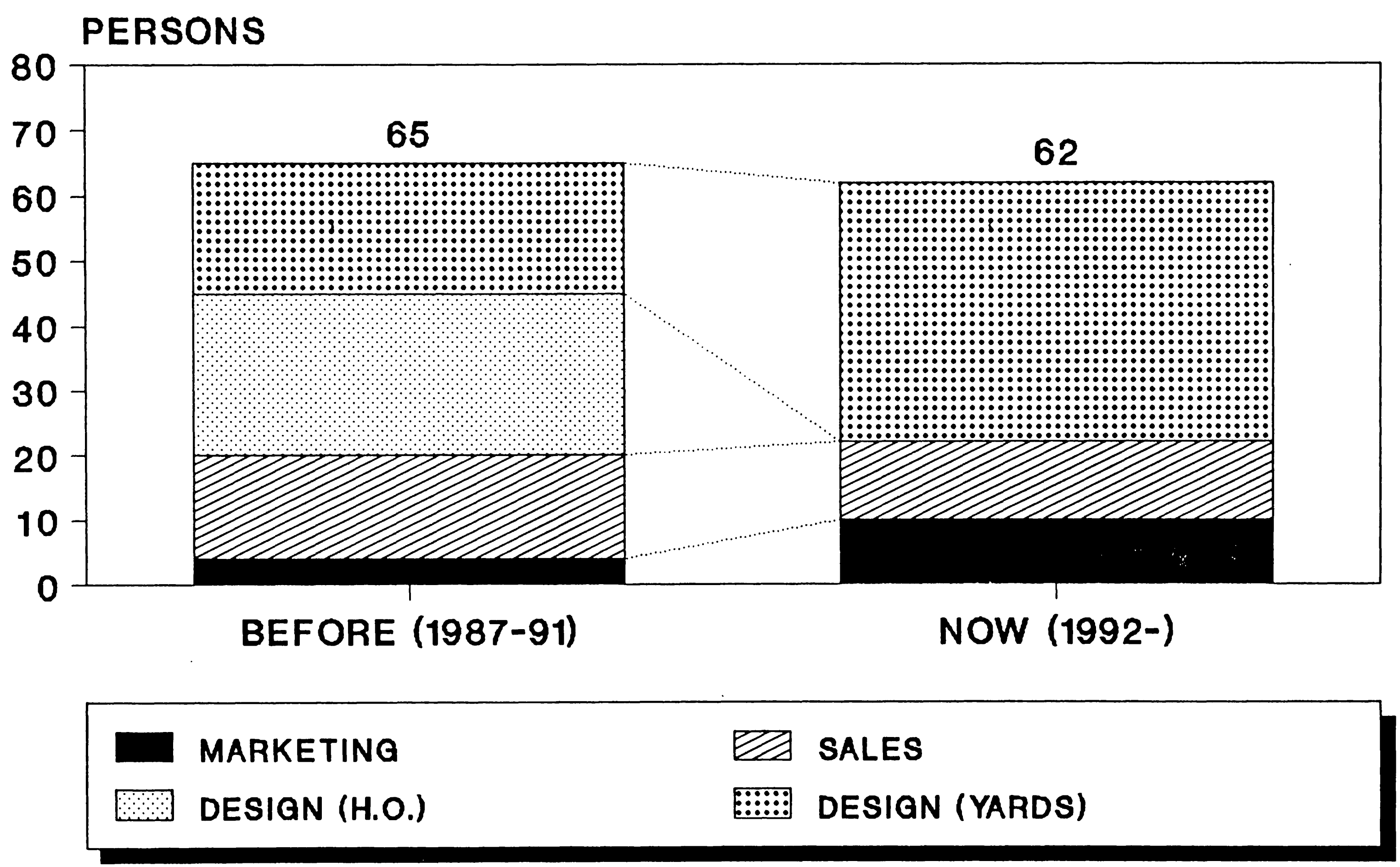
STRATIMP


AESA COMMERCIAL ORGANIZATION
YARDS
EXEC-VP
COMMERCIAL DIV
MARKETING & SALES
STAFF
DESIGN OFFICES
SALES
MARKET PROMOTION
STANDARD DESIGNS
ADAPTED DESIGNS
CONTRACT NEGOTIATIONS
BUILDING STRATEGY
INQUIRY EVALUATION
TENDER PREPARATION
CONTRACT NEGOTIATIONS
AFTER SALES SERVICE
MARKET FORECASTS
PRODUCT-MIX POLICY
PROMOTIONAL VISITS
IMAGE ASPECTS
ORGCOM93

NEW COMMERCIAL ORGANIZATION RESOURCE ALLOCATION (1992-93)



COMRESOUR

COMMERCIAL STRATEGY IMPLEMENTATION LINES 1992-94

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STRATIMP

NEW APPROACH TO CUSTOMER BASE

1. SEGMENTATION AND ANALYSIS OF CUSTOMER BASE.

2. ORGANIZATION AND EXECUTION OF VISITS TO ALL SELECTED CUSTOMERS

3. TARGET 1993: AT LEAST 360 VISITS TO 250 SELECTED CUSTOMERS

4. VISIT REPORTING AND ANALYSIS

5. FOLLOW-UP OF QUESTIONS RAISED DURING VISITS

6. PERIODICAL REVISION OF CUSTOMER BASE AND PLANNING OF FUTURE VISITS

NEWCUSTOM

CUSTOMER BASE SEGMENTATION

FREE MARKETS

- SCANDINAVIA/US: TANKERS
  BULK/CONTS.
- REST OF EUROPE: TANKERS
  BULK/CONTS.
- EUROPE/US: CHEMICAL TANKER
- EUROPE/US: REEFER SHIPS
- EUROPE/US: CRUISE VESSELS
- EUROPE: FERRIES & RO-RO
- MIDDLE EAST
- HONG KONG & TAIWAN

TOTAL ABOUT 250 PREF.CUSTOMERS

SPECIAL MARKETS

- DEVELOPPING COUNTRIES WITH WHICH SPAIN MAINTAINS FAVOU-RABLE EXPORT CREDIT SCHEME
  - LATIN AMERICA
  - NORTH AFRICA
  - CHINA & INDIA
- COUNTRIES WITH SPECIFIC APPROACH PROBLEMS: EX-USSR
- DOMESTIC MARKET: SPAIN

TOTAL ABOUT 75 PREF.CUSTOMER

CUSTSEGM

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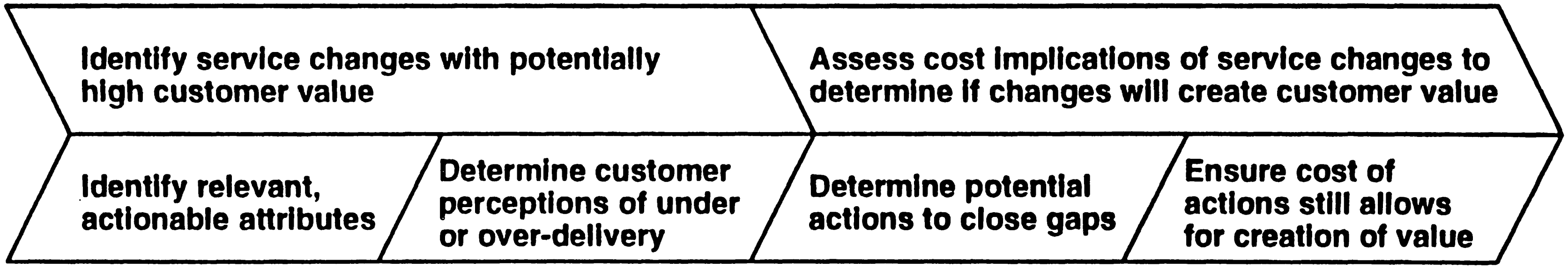
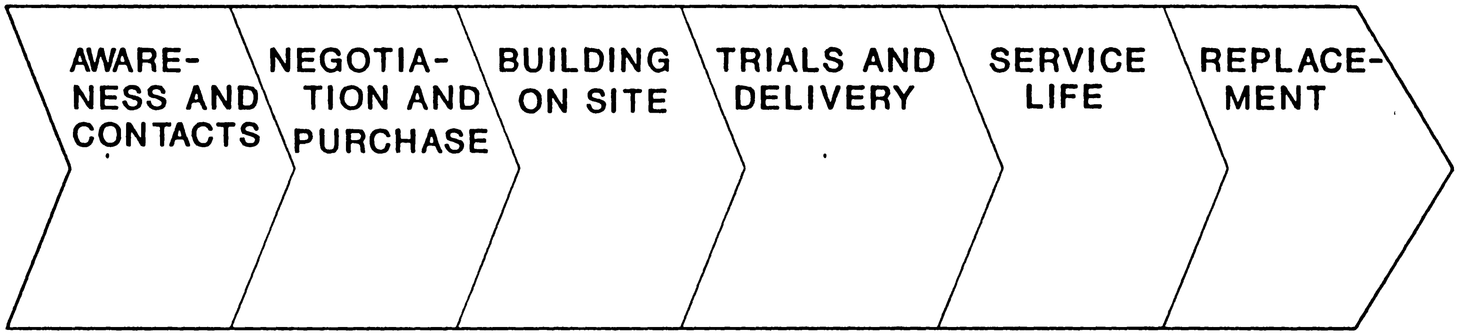
STRATIMP

OVERVIEW OF ANALYTICAL APPROACH FOR ASSESSING CUSTOMER VALUE IMPACT OF SERVICE CHANGES



OPPORTUNITIES FOR CUSTOMER SATISFACTION



REFERENCES	PREMISES	FLEXIBILITY	SUCCESS	WARRANTY	RESALE VALUE
VISITS	PRICE	CHANGES	SCHEDULE	RELIABILITY	UPGRADING
ADVERTISING	FINANCING	LIVING QUAL.	LEADTIME	MAINTAINABIL.	
TRADE FAIRS	LANGUAGE	PREMISES	INCIDENTS	DOCUMENTS.	
PUBLICATIONS	JOINT ENG.		TRAINING	SPARES	
IMAGE	PERFORMANCE				

← POSSIBLE STEPS TO IMPROVE →

CUSTSATI

COMMERCIAL STRATEGY IMPLEMENTATION LINES 1992-94

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STRATIMP

PRODUCT-MIX OPTIMIZATION

- MARKET SEGMENTATION
- ANALYSIS BY PRODUCT
- ANALYSIS OF OWN POSITION TODAY
- SELECTION OF TARGETS FOR ATTACK/DEFENSE
- IMPLEMENTATION

PRODMIXO

PRODUCT SEGMENTATION

LARGE SHIPS

MAJOR SEGMENTS:

- TANKERS: VLCC, SUEZMAX, AFRAMAX, PRODUCT
- BULK: CAPESIZE, PANAMAX, HANDIMAX
- CONTAINERS: >1600 TEU, >3500 TEU

SPECIAL NICHES:

- TANKERS: SHUTTLE TKR., PARCEL CHEM.
- GAS: LARGE LPG, LNG
- CRUISE VESSELS

MEDIUM SHIPS

MAJOR SEGMENTS:

- TANKERS & GAS: CHEMICAL TKRS., LPG
- DRY CARGO: MULTIPURPOSE, RO-RO/CARS, CONT.FEEDERS, MINIBULKERS, REEFERS

SPECIAL NICHES:

- PASSENGER: FERRIES, MINICRUISERS, FAST SHIPS
- FISHING: FACTORY TRAWLERS, TUNA VESSELS
- MISC.: CLABLELAYERS, DREDGERS

PRODSEGM

ANALYSIS BY PRODUCT (I)

WHAT	HOW	WHO
PRODUCT FOCUS: - DEFINITION - STATE-OF-THE-ART - DEMAND STATISTICS - ALTERNATIVE PRODS - CURRENT BUILDERS - OWN STATUS	LOOKING TO THE MARKET AND THE COMPETITORS	MARKETING & SALES AT HEAD OFFICE
ANALYSIS: - WEAKNESSES - THREATS - STRENGTHS - OPPORTUNITIES	BY FACTORS: - PRICE/COST - PERFORMANCE - QUALITY/EXPER. - SERVICE/ETC	M&S + R&D + YARDS

ANAPROD1

ANALYSIS BY PRODUCT (II)

WHAT	HOW	WHO
ALTERNATIVES: - DESIGN - PRODUCTION - OTHER	TRYING TO ESTABLISH A DIFFERENTIAL AD-VANTAGE VERSUS COM-PETITORS	M&S + R&D + YARDS
MAKING DECISSIONS: - MID-TERM - BINDING	CONSIDERING TARGETS AND RESOURCES	TOP YARD AND GROUP MANAGEMENT
IMPLEMENTATION	DEVELOPING AND SEN-DING TO MARKET AN OPTIMUM PRODUCT-MIX	M&S + YARDS

ANAPROD2

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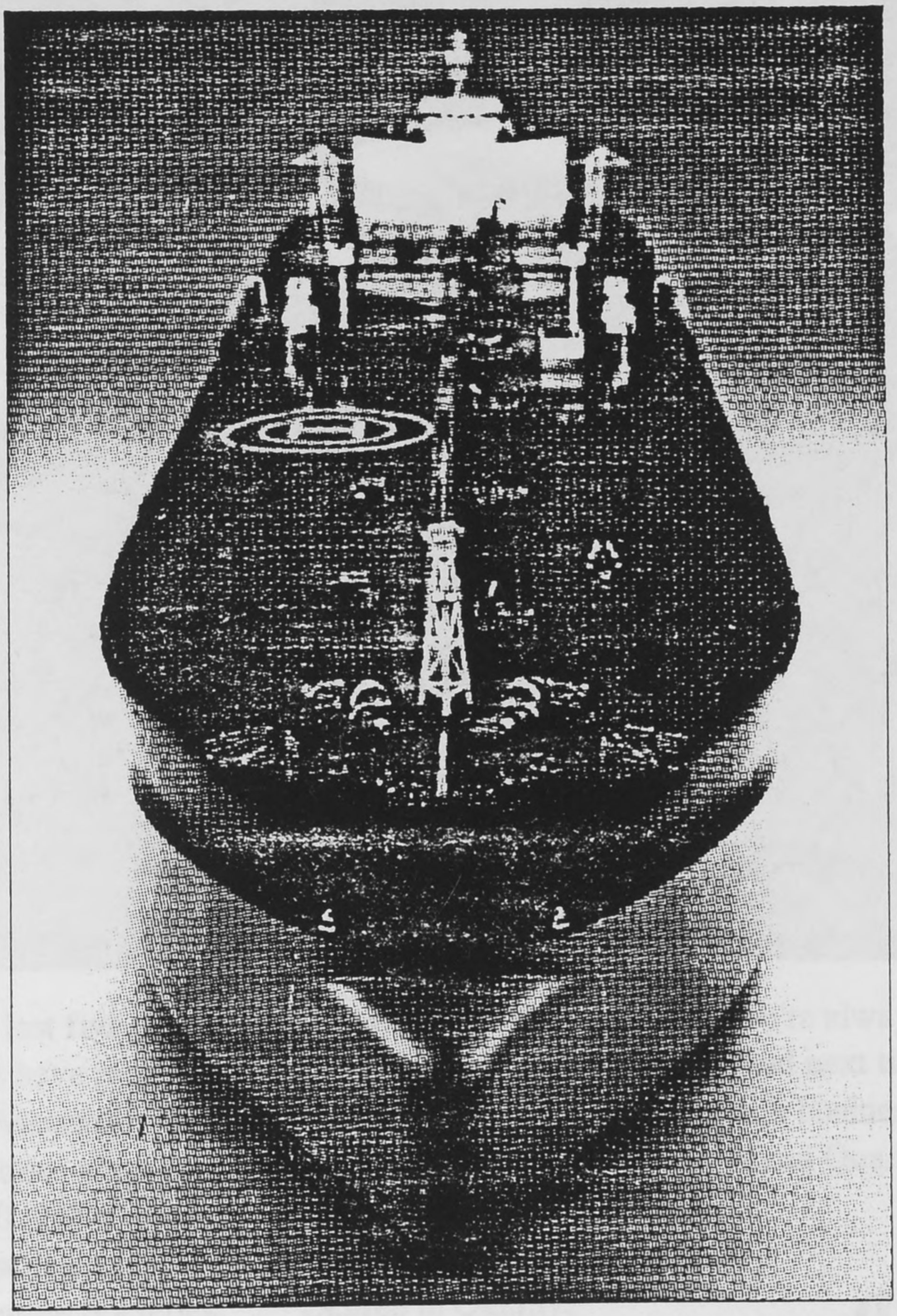
6. **NEW ADVERTISING AND IMAGE CAMPAIGN BASED ON LEADERSHIP, QUALITY & SERVICE LEIT-MOTIVS**

BUILDING UP AN IMAGE

- IMAGE CAMPAIGN EVOLUTION
  1987-89 PRESSENCE & PRICE
  1990-92 PRODUCTS & FLEXIBILITY
  1993- LEADERSHIP QUALITY & SERVICE
- PRESSENCE AT KEY EVENTS CONFERENCES, SYMPOSIUMS WITH STAND AND/OR PAPERS
- PUBLISHING PAPERS IN TOP INTERNATIONAL MEDIA
- PARTICIPATING IN LEADING INTERNATIONAL R&D PROJECTS E3, FASP, CRS, MIT, ETC.
- NEW PRINTED MATERIALS

BUILIMAG

Top quality new tankers.



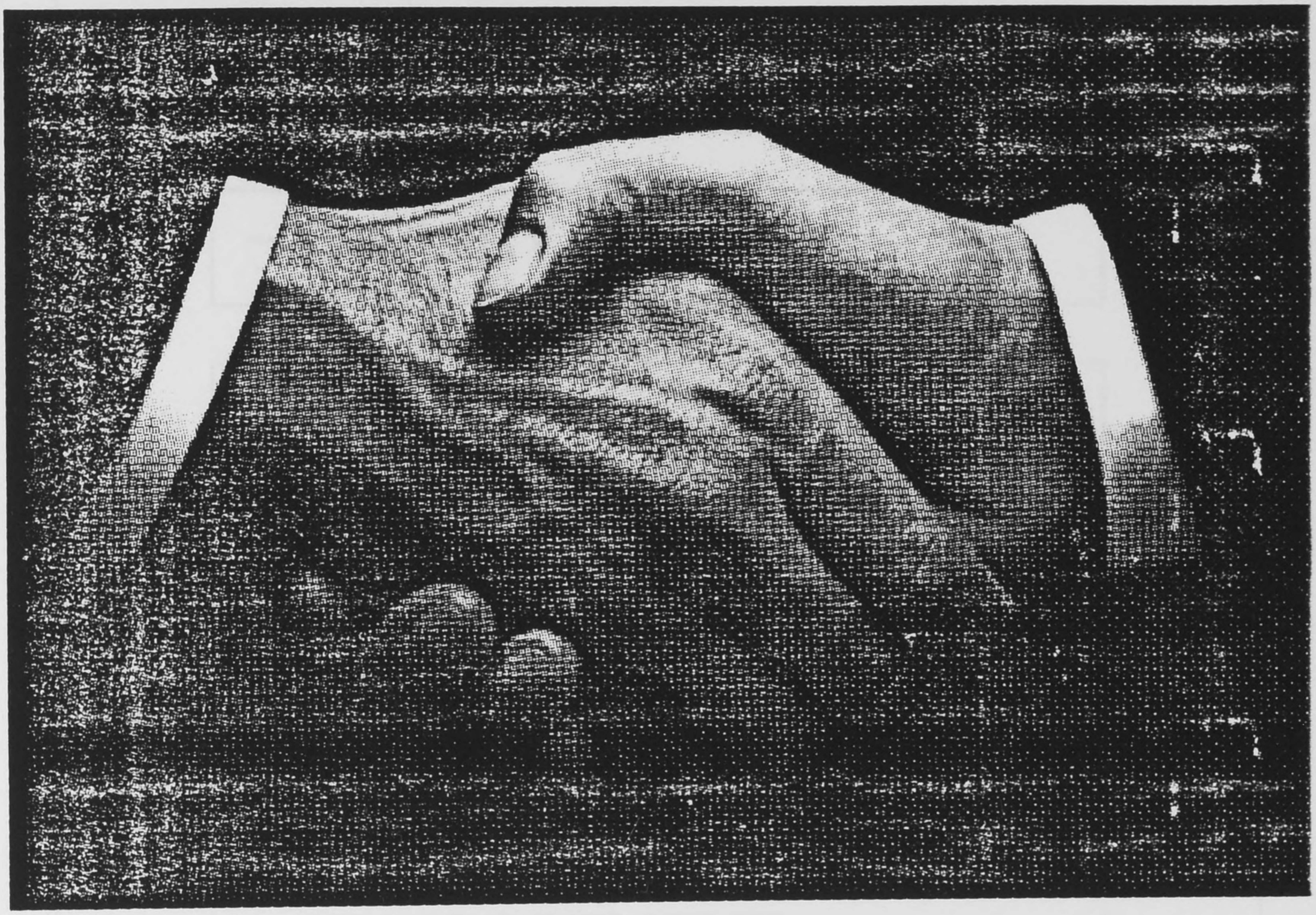
★ ★ ★ ★ ★
E3 Together with four other European Community yards*, we have developed a super-ecological VLCC, the E3 Tanker. The E3 includes modular solutions to all major safety, environmental and economical problems.
A quality option for sophisticated and concerned shipowners.
At affordable prices, which we can adapt to your specific needs.

We're always near you. And the next time we talk business, let's talk about quality in crude oil transport.

ASTILLEROS ESPAÑOLES
Your Quality European Shipbuilder

Ochandiano 12-14 (El Plantío)

Top quality Cum Laude



Over the last five years our yards have received Quality Assurance Certifications according to ISO 9000/9001 from all the leading Classification Societies: American Bureau of Shipping, Bureau Veritas, Det Norske Veritas, Germanischer Lloyd and Lloyd's Register of Shipping, a Master Degree in Quality.

We're always near you. And next time we talk business let's talk about Quality.

ASTILLEROS ESPAÑOLES

Your Quality European Shipbuilder

Ochandiano 12-14 (El Plantío)
28023 Madrid - Spain
Tel. (341) 387 81 00
Fax (341) 387 81 14

THE PATH TO SALES

- CUSTOMER AWARENESS
- INQUIRY
- BID
- SHORT LIST
- CONTRACT
- ENFORCEMENT

PATHSALE

COMMERCIAL ACTIVITY
OBJECTIVES 1993

1. VISIT A LIST OF 250 POTENTIAL CUSTOMERS, SEVERAL TIMES EACH

2. INCREASE INQUIRIES BY 25% AND GET AT LEAST 100 FROM SELECTED CUSTOMERS TARGETED FOR VISITS

3. BID AT LEAST 50 PERCENT OF INQUIRIES

4. SIGN CONTRACT FOR ONE SHIP FOR EVERY 10 BIDS

5. MEET REQUIRED SALES QUOTAS FOR ALL YARDS IN THE GROUP

6. SET UP INDIVIDUAL ACTION PLANS AND TARGETS ACCORDING TO THE ABOVE

NEWTARGT

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0123456 A4 Page 6543210

AIIM SCANNER TEST CHART # 2

Spectra

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Times Roman

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Century Schoolbook Bold

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News Gothic Bold Reversed

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Bodoni Italic

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10 PT ABCDEFGHIJKLMNOPQRSTUVWXYZabcdefghijklmnopqrstuvwxyz;:",./?$0123456789

Greek and Math Symbols

4 PT ΑΒΓΔΕΞΘΗΙΚΛΜΝΟΠΦΡΣΤΥΩΧΨΖαβγδεξθηικλμνοπφρστυωχψζ≧∓",./≦±=≠°><⋫⋪⋗⋜≡
6 PT ΑΒΓΔΕΞΘΗΙΚΛΜΝΟΠΦΡΣΤΥΩΧΨΖαβγδεξθηικλμνοπφρστυωχψζ≧∓",./≦±=≠°><⋫⋪⋗⋜≡
8 PT ΑΒΓΔΕΞΘΗΙΚΛΜΝΟΠΦΡΣΤΥΩΧΨΖαβγδεξθηικλμνοπφρστυωχψζ≧∓",./≦±=≠°><⋫⋪⋗⋜≡
10 PT ΑΒΓΔΕΞΘΗΙΚΛΜΝΟΠΦΡΣΤΥΩΧΨΖαβγδεξθηικλμνοπφρστυωχψζ≧∓",./≦±=≠°><⋫⋪⋗⋜≡

White

Black

Isolated Characters

e	m	1	2	3	a
4	5	6	7	o	•
8	9	0	h	I	B

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MESH HALFTONE WEDGES

65

85

100

110

133

150

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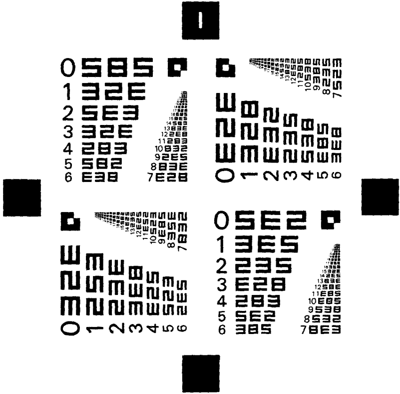
RIT ALPHANUMERIC RESOLUTION TEST OBJECT, RT-1-71



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