SPECIFICITIES OF SUBCONTRACTING SMES' MARKETING IN THE WATCHMAKING INDUSTRY

Spécificités du marketing des PME de la sous-traitance horlogère

Abstract

This paper analyses the structure of the sector of supplier Small and Medium sized Enterprises (SMEs) in the French-Swiss watch industry, its value chain and key players. It explores the relationships of supplier SMEs with their major clients in terms of innovation, quality, prices, communication and partnership. The methodology is based on a mixed approach: firstly, an exploratory qualitative survey with 19 diversified SMEs analysed with a thematic approach; secondly, an online survey administered to a database of 456 supplier firms identified in the sector of watchmaking. An adapted version of the REL-PERF questionnaire (Lages & al.: 2008) was also used. This research highlights the practices of supplyier SMEs according to their specific marketing and sales strategies and activities identifying a dependence on the use of relationship marketing via personal and professional networks. This article suggests ways to help these SME to become real co-contracting companies in order to increase their bargaining power with their key accounts: the watch brands.

Résumé

Cet article analyse la structure du secteur des PME sous-traitantes de l'industrie horlogère franco-suisse, sa chaîne de valeur et ses acteurs-clés. Il explore les relations des PME de la sous-traitance avec leurs grands clients en termes d'innovation, de qualité, de prix, de communication et de partenariat. La méthodologie est basée sur une méthode mixte : une étude qualitative réalisée auprès de 19 PME sous-traitantes de divers métiers et analysée au moyen d'une approche thématique, ainsi qu'une étude quantitative en ligne administrée à une base de données de 456 PME sous-traitantes identifiées dans le secteur horloger. Une grille REL-PERF (Lages & al.: 2008) est mobilisée et validée. Cette recherche met en lumière les pratiques de ces PME sous-traitantes selon leurs stratégies et activités en matière de marketing et de vente ; leur spécificité est celle d'un marketing relationnel activant des réseaux personnels et professionnels. Cet article suggère des pistes pour que ces PME deviennent de véritables co-traitantes pour accroître leur pouvoir de négociation face à leurs grands clients: les marques horlogères.

Key words: B2B, marketing strategy, relationship marketing, supplier, SMEs, watchmaking

Mots-clés : B2B, marketing strategy, relationship marketing, supplier, SMEs, watchmaking

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Introduction

Parallel to the technological innovations witnessed by the watch industry (mechanical and then quartz movements, increased complexity and most recently the connected or "smart" watch) the structure of the industry's value chain has also evolved. Recent years have seen what used to be a large number of suppliers and subcontractors becoming increasingly concentrated, giving rise to groups (namely Swatch, Richemont, LVMH, Rolex, Kerring, & MGI) and to a high level of vertical integration (backward to include suppliers and forward to include distributors) within these same groups.

Today, the economic climate, the technological innovation, the increasing number of brands, the fight for distribution channels combined with the aggressive Asian competition all contribute to the ongoing transformation of the Franco-Swiss watch industry in the Jurassic Arc region. These elements have contributed to the reorganization of the entire production structure, which, until recently, comprised several hundred independent Small and Medium Enterprises (SMEs), brands and suppliers alike but has been impacted by the strategic choices of watch manufacturers (vertical integration) as well as choices made by the subcontracting SMEs (associations and voluntary interest groups). Although the issue of brand marketing in the Swiss watch industry has been the subject of research (Zorik & Courvoisier: 2009; 2010; 2011), the question of marketing practices of industry specific subcontractors, whose power of negotiation (Porter: 1980) is limited with respect to their clients, is frequently ignored.

This article takes a look at the issue of subcontractor marketing strategies within the Franco-Swiss watch industry, paying particular attention to the demands made by the order-placers (the brands) with respect to quality, lead time, innovation, and price. A thorough analysis of the relationships and the networks, which define the industry at the B2B level, is presented in answer to the research question: "what are the particularities of the marketing strategies used by subcontractor SMEs in the Swiss watch industry"? Specifically the importance of relationship marketing (Hutchinson & al.: 2011; Lages & al.: 2008), and that of network marketing (Gilmore & al.: 2001; McLoughlin & Horan: 2000; Ritter: 2000) are taken into account. The first section of this article presents a brief review of the B2B marketing literature followed by the research methodology. This is followed by a presentation of the key results of two studies: a qualitative one (Courvoisier & Calmelet: 2012) and a quantitative one (Auboussier & al., 2015). The final section is a discussion of the results from a management perspective and directions for future research are suggested.

1. Literature review

Early research on B2B marketing and business networks was conducted by the Industrial Marketing and Purchasing (IMP) Group in the 1970's. Publications in the IMP Journal and other academic journals (namely Metcalf & al.: 1992 ; Möller & Halinen : 1999 ; Leek & al. : 2001, Wilkinson : 2001 ; Ritter & al. : 2004 ; Woo & Ennew : 2004) were slow to follow. The concept of social exchange (Metcalf & al.: 1992) is particularly close to our field of research in the watchmaking subcontracting industry. Therefore, the literature on relationship marketing has provided the theoretical basis for our research. A broad definition, based upon Eiriz & Wilson (2004), which goes past relationship marketing to include bi- and multi-lateral relationships as well as networks of relationships was adopted. The position taken is that the similarity between relationship marketing and a network approach allows for a complementarity (Eiriz & Wilson: 2004). Relationship marketing is seen here as a collection of informal processes that have been built up over the years and which characterize the Swiss watch industry from the pre-industrial system of assembling in workshops (« *établissage* »). According to Abdul-Muhmin (2005) and Debos (2006), relationship marketing evolves from short-term transactional exchanges towards long-term collaboration with key accounts. From this perspective, Akrout & Akrout (2010; 2011) add that confidence is a key success factor to developing such a long term collaboration. Donada & Nogatchevsky (2005), in their synthesis of empirical studies in marketing on the performance of client-supplier relationships, emphasize the influence of the variables such as confidence, commitment, joint action and frequency of contacts.

The issues related to supplier SMEs have been the subjects of little research in the French B2B literature with the exception of some work having an industrial marketing focus (Dayan: 2002; Diviné: 2014; Malaval & Bénaroya: 2013; Michel & al.: 2000). In the latter, the concept of supplier firm is brought back to the most basic of sub-contracting activities where the supplier provides what the client wants based on a spec sheet and without any room for discussion.

Among industrial economists (Holmes: 1986; Patchell: 1993), who propose a framework for subcontractor relationships with their clients the work of Holmes (1986) is seen as particularly pertinent. Here, relationships are classified based on the subcontractor's participation in the conception and specifications of the product in question, the market structure and the degree of internalization of the production processes by the client. The three types of subcontracting relationships identified by Holmes (1986) are:

- Capacity subcontracting: product specifications are provided by the parent firm who generally carries out production parallel to the subcontractor;
- Specialization subcontracting: production is carried out entirely by the subcontractor;
- Supplier subcontracting: the subcontractor controls the conception, development and production of its product and is able to develop a personalized product for the client.

It is within this framework that subcontracting within the Swiss watch industry is evaluated and the marketing strategies used by the SME's to reach their clients (the brands) are examined.

Clearly, for producers of complex items which in this industry may call for the integration of numerous components (up to 750 pieces in a complex mechanical watch), the outsourcing of certain technical competencies is in itself a strategy for remaining competitive on both the production as well as cost fronts (Shy & Stenbacka: 2005; Tzokas & al.: 2000). Tajeddini & Trueman (2008) also point out the importance of sub-contractors in the development of innovation and in brand performance, which calls for the provision of added value for the final client and this, particularly in the case of rapid technological progression.

The question that remains to be answered in order to determine the role in and relationship of subcontractors to innovation in the Swiss watch industry is whether this follows the traditional pattern, capacity or specialization subcontracting (Holmes: 1986), or whether it is one of close partnership more along the lines of supplier subcontracting with clearly defined roles such as one sees in the car industry (Bensaou & Anderson: 1999).

The aforementioned authors include the ideas of dependence, opportunism, adaptation and implication in a relationship based on an analysis of the subcontractor's motivation to make specific client-related investments. All of these elements are related to the concept of flexibility in client-subcontractor relationships, a concept which has been developed by Donada & Dostaler (2005) and Ivens & Mayrhofer (2009) and which can be separated into two lines of research:

- Marketing channel research, which is based in transactional approaches, social exchange, power and dependence: and which assumes that each commercial relationship can be examined individually.
- Interactionist-based research, which looks at relationships from the point of view of the network and analyses them within the network from a relationship-marketing standpoint such as done by the IMP group cited previously.

The research presented here follows the interactionist-based approach. The nature of the industry is that there are multiple sub-contractors at various stages of the client's value chain and they, the subcontractors, can in turn can supply competing brands suggesting that the only way to study these relationships is indeed by looking at them from a network perspective.

2. Methodology

This research through its use of both qualitative and quantitative methodologies has taken a mixed method approach which having been carried out at various stages in the research is best characterized as multi-phase (Tashakkori & Teddlie: 1998). The qualitative research, the objective of which was to check our understanding of an industry-specific vocabulary and allow for an overview of current marketing practices within the sector was carried out through the use of semi-structured interviews (n=19). The participants included marketing directors and general managers in supplier SMSs in both the Swiss and cross-border French firms. The sample was a convenience sample in order to allow for maximum diversity and industry representation. The firms selected had between 6 and 150 employees, an annual revenue of between 1 to 20 million euros, a variety of roles in the value chain (3 brands, 14 supplier SMEs, 2 suppliers to the supplier SMEs) and covered a range of watch-related products and services (watch casing, hands, faces, movements, surface treatment, and finishing). The interviews lasted between 60 and 90 minutes. Thematic analysis was applied to the interview content and structured through the use of an interview guide in relation to the research question. At the end of each interview an adaptation of the B2B RELPERF grid (Lages & al.: 2008: p. 691) was also completed by each participant in order to classify the level of subcontractor-key client relations.

The subsequent quantitative study was carried out to validate the initial findings. The sample consisted of 456 Swiss and French firms identified as subcontractor SMEs to the watch industry based on information from various Chambers of Commerce, trade-shows (SIAMS in Moutier, EPHJ-EPMT in Geneva and Micronarc in Besançon) exhibitor lists. An initial mailing to interest the selected firms in answering an on-line survey was followed up by an e-mail one month later. The result was 82 completed questionnaires, representing a response rate of 18%, which were subsequently analyzed by using the Sphinx software.

3. Results

3.1 Qualitative findings

In the first instance the qualitative research allowed for the development of a sector-specific organigram depicting the sub-contracting firms by type. In the second instance these findings allowed for the development of the survey instrument used in the quantitative research. The

19 participating firms were all part of a professional network made up of associations such as the Federation of the Swiss Watch Industry, the Employers' Federation of the Watch Industry, the Association of industrial companies and the Association of specialized SMEs in turning and milling spare parts. One quarter of the participating SMEs were part of a group (or holding) of 2 to 7 firms exercising complementary jobs. The remaining firms were independents.

The first key finding in the qualitative research is that subcontractor SMEs in the Swiss watch industry tend to be part of a network where marketing is practiced on a very personal level with traditional and very direct methods: the telephone, client visits and business lunches (Charlesworth & Courvoisier: 2013). This confirms what was highlighted in the literature review relative to the relationship marketing (Landes: 1987; Eiriz & Wilson: 2004). In the majority of cases the subcontractor SMEs are subject to their clients' (the watch brands) demands. Occasionally, however, the subcontractors SMEs are able to propose innovations and take part in the co-development of specific items. Certain SMEs even take on the role of client and in turn sub-contract out highly specific operations such as surface treatment or quality control. A small number of SMEs have the status of co-contractor that is, they propose innovations and or solutions to their clients. The term co-contractor, which has a less negative connotation than does sub-contractor, suggests a more horizontal relationship and better valorizes the SME, is used with increasing frequency in the watch and microtechnology sectors (Zorik & Courvoisier: 2012).

The results of the qualitative research also bring to light a variety of client relations situations on a scale from total control, more marked in a capacity subcontracting relationship than in one of specialization (Holmes, 1986). In the first instance one finds more polishing and surface treatment subcontractors and in the second those that develop watch cases and faces.

Other elements regularly cited by the subcontractors included: a desire to play a more important role in the value chain (to the extent of becoming a "brand" such as Intel is to computers or Incabloc in watch movements), to diversify their client portfolio, to listen more closely to their clients, to place the quality bar very high and to "*add service elements to their product palette*". The most frequently mentioned key success factors were: mastery of the trade, physical proximity and availability to the clients, quality (minimal waste defects and client returns), respecting time limits and of course also the prices (especially for Swiss companies exporting to the Euro zone). The findings can be grouped around two main concepts: quality and innovation.

3.2 Quantitative results

Participants in the quantitative research (n=82) were three-quarters Swiss firms and one-quarter French with two thirds of all respondents having fewer than 50 employees and thus the profile of a SME. 81% of the respondents were independent firms that are not part of a watch group with a portfolio of brands and supplier firms. 87% of the SMEs are active in the watch industry as well as at least one other sector (essentially medical, micro technique, connector and automobile). Most of their revenue, however, comes from the watch sector, of which nearly 40% comes from the production of watch movements. The three principal knowledge domains cited were: surface and finishing treatment, the fabrication and assembly procedures.

In terms of client-relation types the most frequently mentioned was that of *sub-contractor* (61%) followed by *manufacture* *based on client specifications* (39%) and conception + manufacture as per client design (36%). A chi-square test showed that there is no relationship between the subcontractor activity and the client-relation type, nor with knowledge domain and the client-relation type.

The key success factors the most frequently cited by the sub-contractors were: quality (90% of the items cited), reactivity, timeliness, and the confidence in the supplier-client relationship. The price, innovation and the follow-up relationship were seen as playing a role of lesser importance.

The Sales or Marketing departments of the participating SMEs was made up of one to two people in general. In 66% of the cases, this role was carried out by the CEO and in 22% of the cases by the Sales manager. The manner in which market trends are followed are: client visits and contacts (91%), trade-show participation either as an exhibitor or a visitor (81%), word-of-mouth (49%) and finally through trade revues (26%). Only 20% of the participating SMEs follow market trends through the Internet and only 10% conduct market research studies. A chi-square test showed that neither the SME size nor its activity influences the marketing tools used.

The sales/marketing budget (not including salaries) represents at least 5% of the firm's revenue for 73% of the participating SMEs. A chi-square test shows a statistically significant relationship between number of employees and the percent of revenue allocated to marketing activities with the smaller firms investing proportionally more than do medium-sized and larger firms. For 49% of the participating SMEs marketing is "*putting the clients at the center of firm's concerns*"; for 35% it is "*working on supplier and client relationships to the best of my ability*"; for a minimal 8% it is "*advertising*".

The analysis of the REL-PERF (Lages & al.: 2008) grid shows the respondents in agreement with the proposed items with the exception of: client problem resolution and advice-giving and/or problem resolution by the client (detail provided in annex 2).

4. Discussion, theoretical contribution, and implications for management

In terms of theoretical contribution, the research on the marketing practices of supplier SMEs in the watch industry confirms elements already reported and cited in the literature review as well as bringing to light elements rarely mentioned in this B2B domain. Amongst the theoretical elements confirmed this research highlights the good match with Holmes' (1986) classification as well as a tendency for, the majority of, participating SME's to fall into the second and third categories, that is specialty or exclusive piece sub-contracting. The latter concerns most particularly watch face, strap and hand production. The use of the REL-PERF grid (Lages & al.: 2008) was not only useful but also allowed for the confirmation of the principal criteria relating to B2B confidence in marketing practices (annex 3).

In terms of relationship marketing, Eiriz & Wilson's definition (2004), previously cited, was found to be the most pertinent. The relationship network and client-supplier trust plays a fundamental role in watch sub-contracting to the extent that a client will change supplier if the contact person moves to another firm. In other words, it is not unusual for a client to follow a specialist rather than stay with the supplier firm.

In terms of marketing strategy and marketing tools the quantitative results confirmed most of the findings of the qualitative study (Charlesworth & Courvoisier: 2013). In response to our research question "what are the specific features particular to subcontractor SME marketing practices in the watch industry?" the strategies followed are empirical, (for example sector knowledge and use of the industry network to identify new clients: "*in the watch industry everyone knows one another; it's a small village")* and the marketing tools in use are not very sophisticated: telephone, trade show contacts, a rudimentary web site. The research identified cultural differences between Swiss and French supplier SMEs in their marketing practices.

The aforementioned allows the following managerial recommendations to be made to subcontractor SMEs: it is important to be visible, especially through the maintenance of a multilingual web site (French and English are necessary but alone are insufficient), well referenced and continually updated. A presence in the trade press to highlight the SME's competencies and its capability to innovate (although not always possible to illustrate with client-specific products) is very worthwhile, either through a promotional report or paid advertising. Additionally, it is suggested to have hard copy information available through printed brochures and technical data sheets to pass out and if possible, in person and in selected trade shows. Finally, it is advisable to cultivate client relationships through event organization and client meetings. The findings are in agreement with what Palmatier & al. (2007) who suggests that firms dependent on word-of-mouth strategies to attract new clients should put a relationship marketing program into place.

The above-made suggestions will help to further positive word-of-mouth publicity specific to the watch sector if they are linked to irreproachable quality and on-time delivery. Although the participants in the study did not show much interest in a social media presence, it is suggested that media such as Viadeo, LinkedIn or even YouTube can offer a certain visibility all the while calling for limited effort on the part of subcontractor SMEs.

5. Limits of the research and directions for future research

There are three limits to this research: in the first place and despite the diversity of company profiles in the sample and having reached saturation (Giannelloni & Vernette: 2012) in the findings, the whole spectrum of watch industry sub-contracting firms (see annex 1) was not represented. In the second instance the 18% response rate to the online survey does not allow the results to be seen as representative of the entire industry: additional research should be conducted amongst non-respondent firms. The low response rate suggests that the importance of marketing remains low in industrial SMEs. In the third place, use of descriptive methods has limited the scope of the results presented yet reflects the specific nature of the sector studied, one under the influence of order-givers: the watch brands who in turn, large exporters, are dependent on the health of the world economy.

Future directions for research could see an exploration of other related sectors including medical, connector industry or automobile (Bensaou & Anderson: 1999) in order to allow for a comparative study of the level of supplier-client relations. With respect to the increasing move towards vertical integration on the part of industrial groups and brands buying out their suppliers, another direction for research would be to study the conditions and criteria that would allow a subcontractor to remain an independent firm. The dialectic of subcontractor SME independence versus integration is ongoing. For further reference see the debate held at the Professional Watchmaking and Jewellery Environment (EPHJ) trade show held in Geneva (Pires: 2014).

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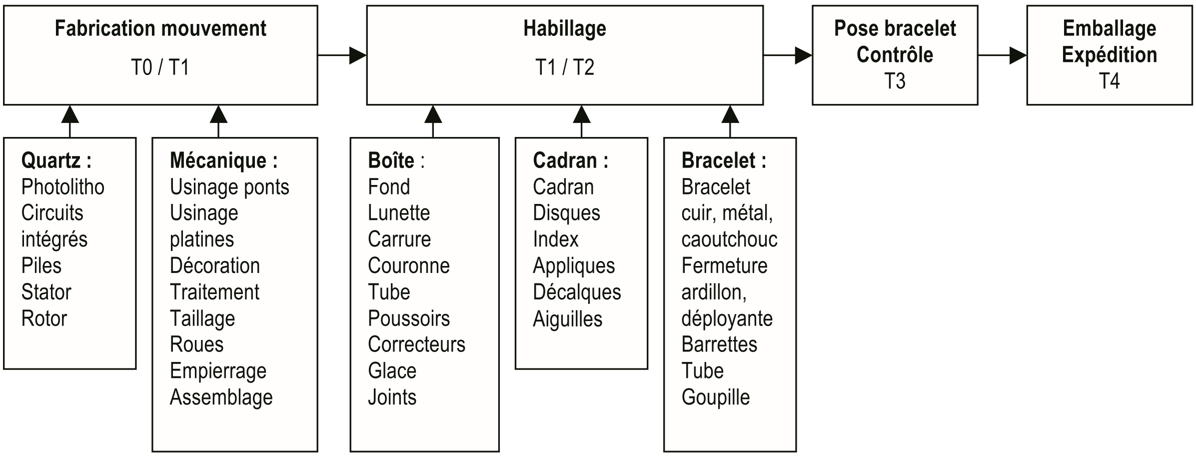
Annexe 1 : Cartographie des grandes familles de composants horlogers

Etapes de production



Opérations de fabrication communes

Machines	Outillage	Décor	Traitement	Polissage	Sertissage	Etampage	Visitage

Services communs

Design	Banque	Assurances	Logistique	Publicité	Imprimerie	Evénements	Labo / tests

Source : cartographie établie par les auteurs, sur la base des entretiens qualitatifs avec les managers de PME sous-traitantes

Annexe 2 : analyse de la grille REL-PERF (Lages et al. 2008) soumise aux PME sous-traitantes

	pas du tout d'accord	pas d'accord	Peu d'accord	Plus ou moins d'accord	Assez d'accord	D'accord	Tout à fait d'accord	**TOTAL**
politique respecte le frnr	0,0%	0,0%	9,0%	14,1%	11,5%	38,5%	26,9%	**100%**
pratiques resolvent problèmes	3,8%	0,0%	6,4%	23,1%	33,3%	29,5%	3,8%	**100%**
X resout les pb	2,6%	13,0%	16,9%	24,7%	22,1%	16,9%	3,9%	**100%**
partenariat LT	0,0%	0,0%	2,6%	7,7%	20,5%	20,5%	48,7%	**100%**
aimons collaborer	1,3%	1,3%	6,4%	3,8%	19,2%	32,1%	35,9%	**100%**
fiers associés à Y	1,3%	2,6%	5,1%	10,3%	20,5%	23,1%	37,2%	**100%**
X a notre confiance	0,0%	0,0%	3,8%	12,8%	12,8%	42,3%	28,2%	**100%**
X grande intégrité	1,3%	1,3%	5,1%	10,3%	20,5%	39,7%	21,8%	**100%**
X donne info et conseils	0,0%	3,8%	11,5%	24,4%	29,5%	17,9%	12,8%	**100%**
interaction régulière	0,0%	1,3%	3,8%	7,7%	20,5%	42,3%	24,4%	**100%**
communication ouverte	0,0%	0,0%	3,8%	10,3%	25,6%	34,6%	25,6%	**100%**
satisfaction générale	0,0%	0,0%	1,3%	7,7%	17,9%	48,7%	24,4%	**100%**
heureux X fait pour nous	0,0%	2,6%	3,8%	21,8%	21,8%	28,2%	21,8%	**100%**
referez collaboration à nouveau	0,0%	0,0%	0,0%	2,6%	11,5%	32,1%	53,8%	**100%**
Ensemble	**0,7%**	**1,8%**	**5,7%**	**12,9%**	**20,5%**	**31,9%**	**26,4%**	**100%**

Interprétation : X représente le principal client des PME sous-traitantes interrogées (84 entreprises ont répondu à l'étude quantitative). Les items « remarquables », c'est-à-dire en sur-représentation, sont entourés en bleu. Les items en sous-représentation sont entourés en rose. Ces représentations sont basées sur un test du Chi2 avec ddl = 78 ; 1-p = 99,99% et Chi2 = 293.25. De manière générale, on constate que :

- le principal client (X) respecte assez bien la politique du fournisseur ;
- X a des pratiques qui résolvent les problèmes ;
- X ne résout par forcément les problèmes de son fournisseur ;
- la relation entre le fournisseur et son principal client (X) est basée sur un partenariat à long terme ;
- la collaboration entre le fournisseur et X est bonne et basée sur la confiance ;
- le principal client X donne plus ou moins de conseils et d'informations fiables ;
- l'interaction fournisseur-client est régulière et la communication ouverte ;
- la satisfaction générale est bonne et que, si c'était à refaire, le fournisseur collaborerait de la même manière.

Annexe 3 : modélisation des relations-performances fournisseur-client selon la grille de Lages et al. (2008)