

Advertising for immigrants in Spain. From the perspective of the agencies

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Abstract: This article examines the present and future of advertising targeting immigrants in Spain. The research is based on the results of a Delphi survey conducted in 2009 and 2010 among directors of ethnic advertising agencies. The main purpose is to analyse the trends that, according to these directors, will characterise advertising for immigrants in the coming years and the way these experts would like this type of advertising to evolve. The article examines the needs of companies to direct their advertising at a society that is increasingly culturally diverse due to the significant rise of immigration in Spain in the last few years. The results show that in the future advertising for immigrants will be more creative, will use more the Web 2.0., will be more professionalised, and will research more about immigrants. The results also predict that advertising for immigrants will give less importance to immigrants' ethnicity and the cultural references about their origins. The reason is that the new residents will be increasingly integrated into the Spanish society and therefore increasingly incorporated into the planning of any type of campaign.

Keywords: advertising; immigration; ethnic agencies; cultural diversity; Spain.

Summary: 1. Introduction. 2. Methodology. 2.1. Justification and objectives. 2.2. Research design. 3. Results. 4. Discussion and conclusions. 5. Bibliography.

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1. Introduction

Few phenomena are changing the Spanish society of the 21st century as much as immigration. A simple quantitative analysis of this phenomenon clearly shows the important force it has gained. According to the latest data from Spain's National Institute of Statistics (2011), there are already more than 5.7 million immigrants registered in Spain, i.e. 12.2% of the whole population.

Other sources indicate significantly smaller figures, like the Spanish Ministry of Labour and Immigration (2010), which says that the number of new residents with registration certificate or residence card reaches 4.9 million. However, the data from the census reflects better the reality

of immigration in Spain, both regular and irregular, given that it registers immigrants regardless of whether they are legally or not in the country. Importantly, the force of the phenomenon is not only proved by these figures about the current prevalence of immigrant in the Spanish society, but also by the evolution that the immigrant population has experienced in recent years.

In the first five years of the 21st century the Spain population increased more than it did in the previous 20 years, undoubtedly thanks to the contribution of immigrants. In addition, in comparison to the current figures, in 2000 the number of new residents did not reach one million and two years later, in 2002, it still did not reach 5% of the population. Not in vain, according to the United Nations (2006: 29), in absolute terms Spain has been, after the USA and along with Germany, the country in which the immigrant population has increased the most from 1990 to 2005; and in percentage terms the increase in Spain has been the largest in the world, a resounding 525%.

The social changes provoked by this tremendous rise in immigration have been numerous and they are being examined by an increasing number of communication researchers. In the area of journalism, many of these efforts have been directed, on the one hand, to the analysis of the media representation of immigration from different methodological perspectives. Some particularly successful works have been based on the theory of *framing* (Muñiz et. al., 2006; Muñiz et al, 2008; Igartua and Muñiz, 2004). On the other hand, other scholars have directed their efforts to the examination of foreigners-aimed media. Studies of foreigners-aimed media already existed in Spain since the end of the 19th century (López Romero, 2009), but they have acquired new relevance in recent years.

Foreigners-aimed media have been presented as an alternative to the role of the whole media “in the reproduction of an adverse discourse on immigration” (Martínez Pastor and Santín Durán, 2010: 132). In this sense, “publications directed at this public are being consolidated, in light of their audience levels, and proliferate nationwide. And this is certainly necessary to satisfy the information and entertainment needs of this niche market” (González Cortés, 2009: 723).

A proof of the relevance acquired by these media, which is also essential for advertising, is the fact that the “minority media” project, which is carried out at the University of Poitiers and under the direction of Isabelle Rigoni, has counted more than 5,300 ethnic minority media in Europe. A similar trend occurs in other regions with an important foreign population, as it is the case of the USA, where in recent years the increase in the Latino population has contributed to a boom in the Spanish-speaking press (Gómez Mompert, 2008: 16).

This article intends to offer a better understanding of the impact of immigration on another field of communication studies: commercial communication and in particular advertising, which “as

one of the most visible faces of corporate communication has reflected those changes and the adaptation attempts made by the new cultural identities living in the country” (Baladrón Pazos, 2009a: 108). The fact that the new residents represent approximately one tenth of the consumption market in Spain, with an annual expenditure of about 60,000 million euros, has driven companies to see this sector as a group of great interest.

The accelerated growth of the phenomenon has led companies, in some cases, to get an inadequate view of immigrants. However, it is unquestionable that the big companies have begun valuing positively this niche market. Meanwhile, the increase of the immigrant market has led to the emergence, since the early 21st century, of the so-called ethnic agencies: companies specialized in the planning and management of communication with these groups.

Frequently, society demands that the advertising produced by these ethnic agencies must be friendly and avoid the use reductionist stereotypes, which are often used in the advertising representation of the various ethnic groups. In this sense, Isidoro Arroyo and Rebeca Martín agree that there is a lack of “humanisation of difference capable of promoting the enrichment of the stereotypes, and even challenging them” (2009: 122). It should be noted that the use of reductionist stereotypes tends to be more common in commercial than institutional advertising. Thus, according to a qualitative study by Esther Martínez and Ricardo Vizcaíno (2008: 93), commercial advertising is the one that triggers immigrants’ rejection of the messages aimed at them.

In view of this situation, it is necessary for companies to include in their advertising cultural diversity in a realistic and unprejudiced manner, because advertising can play a significant role in the integration of the new residents (López Vázquez et. al., 2009). It would be “a way to express in a natural way Spain’s current social reality and to achieve a better and more rapid integration of immigrants” (Villagra García et. al., 2009: 95).

Scientific research on commercial communication aimed at immigrants in Spain has not been as prolific as the research on representations of immigrants in the press, although some scientific articles have been published recently (Baladrón Pazos, 2009b; Álvarez Ruiz et. al., 2009), as well as various studies like the ones mentioned so far, either focused on institutional or commercial advertising. All this, of course, does not include the professional publications that are sometimes sponsored by ethnic agencies.

This research is similar to the one about commercial communication aimed at the new residents in other countries where immigration has occurred since centuries ago, and this communication is often included in the broadest field of the so-called ethnic marketing. In this sense, a remarkable historical analysis is offered by Geng Cui in some of his latest works focused on the

USA (Cui, 2001; Cui and Choudhury, 2000), one of the countries that has previously undertaken scientific research on cultural diversity in consumption environments.

Within this context of certain euphoria produced for the expansion of markets provoked by the rise of immigration and of outstanding research work undertaken in Spain, the severe economic crisis currently faced by Spain has put a break to the expectations generated so far. However, we can affirm that immigration will remain to be a very important social phenomenon in the next decades and, therefore, the new residents will continue to be a market of great interest for companies.

In fact, the UN's latest report on human development pointed out that the migratory movements will intensify again once the crisis is over: "With recovery, many of the same underlying trends that have been driving movement during the past half-century will resurface, attracting more people to move" (2009: 3).

The best proof is that, according to Spain's National Institute of Statistics (2011), during one of the most difficult years in the economy of contemporary Spain the number of immigrants just decreased by 0.3%. In the same vein, one of the latest short-term population projections offered by the National Institute of Statistics (2010) indicated that, although the rate of immigration will be smaller (it is important to remember that almost a million foreigners arrived in 2007), between 2012 and 2018 the country will continue receiving between 300,000 and 400,000 new migrants per year. Therefore, by the middle of this century the population of new residents could comprise almost 15 million people.

As a consequence, the immigration phenomenon is and will remain so relevant in Spain as to demand further research from the communication sciences, especially in the field of advertising, which is still insufficiently explored. Companies demand recommendations based on scientific methodologies to define strategies to deal with the diversity of today's society. As Juan Rey affirms, "what is important about advertising is not its past but its future, i.e. its capacity to respond to the needs of a society that is becoming more complex and diverse" (2008).

The importance of this market and its consumption potential demand studies to alleviate the deficiencies of recent advertising campaigns directed to the immigrant public. Some of these campaigns sometimes had an inadequate strategic planning to be accepted by an emerging market, which due to its accelerated growth still constitutes an unknown area for Spanish businesses and advertising directors. The key objectives of these studies must include the diagnosis and analysis of the current state of advertising and the identification of strategies that can be explored in the future.

2. Methodology

The evolution of Advertising for Immigrants in Spain (henceforth AFIIS) over the next few years is precisely the object of study of this research work, which was undertaken from October 2009 to February 2010. To identify the future trends we used the Delphi method as the most suitable tool to obtain reliable scientific results.

As we know, this research technique is a systematic and iterative process in which a group of experts is questioned in successive rounds through questionnaires in order to obtain a consensual opinion on a given subject or at least, a credible group opinion, given that, on occasions, the complexity of the topics presented does not allow reaching a consensus at the end of the process. It is a subjective forecasting technique that began to be used in the academic and business areas in the 1970s due to its usefulness to analyse uncertain situations, which are so common in today's world.

2.1. Justification and objectives

The potential of this method to obtain useful information in situations of uncertainty is the main reason to justify its use in this work. In fact, the crisis faced by the Spanish markets also affects advertising and the whole of commercial communication directed at immigrants, which raise doubts about its profitability or the ideal ways to obtain greater efficiency. The Delphi study was aimed at obtaining significant information, from experts and key informants, about the ideal development of advertising for immigrants in the future and predictions of the actual way in which advertising will evolve.

Regarding the first objective, the purpose was to get information about: the strengths and deficiencies of AFIIS which will need to be reinforced and overcome, respectively, in the near future; the strategies to follow to properly communicate with the successive generations of immigrants, the so-called second generations; and the information gaps that persist about this market and must be resolved through scientific research and knowledge.

As for the second objective, this study aims to obtain data regarding: the main economic areas for which the new residents will be important in the coming years; and the major trends that will shape the future of advertising directed at immigrants in Spain. Based on the information collected on the different aspects of the first and the second objectives, we will offer an analysis on the future of AFIIS and strategic recommendations in this regard.

Another reason that justifies the methodology has to do with the completeness of the Delphi method which, as Juan Antonio Gaitán and José Luis Piñuel point out, “is simultaneously a type

of group discussion, a type of interview and, even, a type of survey” (1998: 136). It goes beyond the techniques of individual perspectives, as it is the case of surveys, since as a group method the final outcomes are the result of the interaction of all participants. All this is possible thanks to the feedback controlled by the researcher, who guarantees that all individual views are taken into account when trying to establish a group opinion.

Thus, the final outcome of the process is superior to the one achieved using individual forecasting techniques, i.e. the group result is better than the sum of the individual contributions from participants. In addition, compared to what happens in other group techniques such as groups of discussion, the anonymity between participants and the confidentiality of responses avoid the negative influences of the dominant members, which can lead to inhibition in the rest of participants.

On the other hand, the choice of the Delphi method has been motivated because it allows combining the objectives of scientific, academic and business activities. Aware that this research has to be useful for society, the objectives and research try to contribute to the advancement of knowledge about the subject of study, but also to help advertising professionals in the decision-making process.

In recent years various private entities (like Nielsen, TNS, and various advertising agencies) have made very important research studies on advertising for immigrants and about the consumption habits of the new residents. Meanwhile, a prominent part of the academic studies on this subject have had an excessively theoretical approach and have almost always focused on gathering information among the recipients of the messages, the immigrants. However, they have not paid enough attention to the media professionals involved in the creation of advertising targeting immigrants, which in our opinion is of great interest and also justifies the use of the Delphi method.

2.2. Research design

The selection of research participants is based on the idea that an expert is a person who because of his or her personal resources or situation could provide useful information for the research objectives regarding the future of AFIIS. Moreover, in order to ensure a better understanding of the object of study, we decided to select specialists who were actively involved in the area of study and met the selection criteria taken: high level of knowledge, forecasting capacity and degree of motivation.

Thus, the people selected as expert participants in the Delphi panel were the top executives of the major Spanish companies dedicated to the professional management of communication for

immigrants. Although there were other specialists with useful views in the subject (for example, those responsible for the immigrant sector in the advertising companies), we selected the first category of experts for two reasons: First, and most importantly, because this research is the first stage of the analysis and exploration of AFIS, and there are other phases already in progress (Baladrón Pazos, 2010). Second, because the group selected meets the selection criteria, and has a very important level of motivation and willingness to cooperate in the investigation, which is a particularly important factor to ensure the successful conclusion of the Delphi process.

The identities of selected experts, along with their position at the time of the research are described below, in alphabetical order:

- Ana Calderón, general director of *Etnia Comunicación*.
- Emiliano Tichauer, general director of *Culsion*.
- Enric García, general director of *Smart Consulting*.
- José Santamaría, general director of *Minority communication*.
- Isabel Fernández, general director of *Origen - Grupo Eñe Comunicación*.
- Paul Fleming, president of *Fleming, Torra & Associates*.
- Pilar García de Viedma, general director of *Ethnical Consultants*.

We considered that the total number of expert participants, seven, is sufficient to ensure rigour and reliability in the Delphi results because, according to researchers from the Rand Corporation (USA), this figure is considered the minimum number to ensure the accuracy of the group estimation, and because the collective universe of experts is numerically small, which makes the number of panellists highly representative. In fact the list of participants represents almost all of the companies specialised in communication with immigrants in Spain.

Eventually, six participants completed the process, which represents an index of abandonment under 15%. This is a very low rate that does not decrease the scientific rigor to the obtained results, especially taking into account that in previous published works the rate of abandonment is 20-30% (Landeta, 2002: 122).

The experts participated in the research through self-administered questionnaires, which contained questions about the six sections that are discussed in the second part of this article. The first round's questionnaire included open questions and the answers were used to create response options for the questions of the second round's questionnaire. The options were always ordered alphabetically to avoid leading respondents towards one answer.

In order to avoid researchers' influence as much as possible, the feedback only included the information given by experts in the first round, which was then processed by the researchers

who, with the greatest possible objectivity, selected the most significant views and incorporated them into the subsequent iterative process without losing real information and maintaining the meaning provided by specialists.

The closed ended questions of the second round were designed in accordance with the Delphi technique, so that they could subsequently be statistically analysed to obtain a response group. In order facilitate an easy numerical analysis of responses, the questionnaire requested respondents to assess a series of items according to a 0-5 scale.

We decided to use assessment instead of ranking because the number of response options was quite high in all cases, and this made it easier for participants to assess the different response items. As established in the research design, during the second round no statistical information was provided to the experts, because specialists in the Delphi methodology often doubt this kind of information will enrich the process.

In order to meet the research work schedule and avoid experts' demotivation, which could endanger the obtaining of reliable results, the second phase concluded the iterative process. As Jon Landeta points out regarding the use of the Delphi technique by specialised agencies, the "temporary and budgetary constraints and the difficulty of maintaining the commitment of experts make it difficult to reach the third round" (2002: 102). Therefore the use of only two rounds is scientifically valid, as most studies typically stop at the second or third round even if a consensus of responses has not been reached.

After the iterative process, the assessments of each expert were integrated into the group estimation. Since most of the questions were based on assessments, a value of central tendency was calculated from the values of each response item. We used the median, instead of the mean, as a measure of central tendency to avoid the risk of dismissing the group view, since the mean would give excessive weight to answers with extreme values.

The next section presents the final results of the iterative process through various tables that present the response items from major to minor consensus, which allows visualising the gradual degree of consensus or disagreement. Therefore, the top positions are occupied by the items with the highest median. In cases where several items have the same median they were ordered from lowest to highest standard deviation. We considered unnecessary to present the partial results of the iterative process from the first round, since as mentioned before, we did not carry out a statistical comparison of the results from the first and the second rounds.

3. Results

The first questions were about the ideal strategies that advertising for immigrants should adopt in the coming years. This study tries to obtain meaningful information in particular about two issues. First, about the strengths of the advertising directed at immigrants in Spain, which, according to the Delphi panel participants, should govern the future of this type of communication. And second, about the weaknesses of the AFIS that must be overcome in the next few years.

Detecting the strong and weak points is an ideal way for advertising professionals to strengthen those aspects deemed positive and overcoming the shortcomings of the AFIS.

The results indicate that the directors of ethnic media highlight as vital, for the present and the future, the flexibility of the commercial messages that advertisers direct to the new residents and their important adaptation to the peculiarities of not only the total of this segment, in comparison to the rest of the population, but also of each differentiated community of immigrants. We must not forget that the cultural diversity within this segment is very large, and that this is why advertisers often talk about *multi-target*.

As an example of this, participants in principle establish that the main strengths that AFIS must continue to have in the coming years are the capacity to reach the target audience through personalised messages and direct channels and, secondly, the capacity to adapt the content and, to a lesser extent, the creativity of the advertising messages to each group of immigrants (see table 1).

Despite the degree of disagreement in the previous responses is relatively important, as it is evident from the standard deviation data for these two response items, there is a wider consensus among experts in other strengths that have to do with advertising's capacity of adaptation to the diversity of the immigrant sector. Thus, in a second level, the experts point out as strong points that AFIS must have in the coming years the important segmentation of channels, the capacity to selectively get the message across to the target audience, and the connection with the concerns and needs of this segment of the population.

In any case, these opinions can be better understood when looking at the opinions expressed by the experts in the second question of the questionnaire, which is examined later.

Another advantage that experts attribute to the AFIS and consider that it is important to maintain in the near future is the high loyalty of immigrants towards brands that target them exclusively, especially towards those advertisers that previously considered them an audience of interest in their advertising strategies.

Table 1. Main strengths that the AFIIS currently has but needs to reinforce in the future

Rank	Item	Median	Mean	Deviation
1	Outstanding use of direct channels to reach immigrants through personalised messages	4.5	4	1.15
2	Adaptation of the contents of messages to each group of immigrants	4.5	3.67	1.6
3	High loyalty of immigrants, especially towards advertisers that first considered them a relevant <i>target</i>	4	3.83	0.69
4	Important segmentation of channels, capacity to selectively get the message across to the target audience	4	4	0.82
5	Connection with the concerns and needs of this target audience	4	3.83	1.07
6	Little advertising saturation among immigrant groups, particularly regarding campaigns specifically targeting them	4	3.33	1.11
7	Use of a common language in most of the cases	4	3.17	1.21
8	Use of familiar influential spokespersons, often of the same nationality of the recipients	4	3.5	1.26
9	Adaptation of the creativity of the messages to each group of immigrants	4	3.33	1.37
9	Representation of the cultural values of immigrants, which promotes the identification with their countries of origin	4	3.33	1.37
10	High impact and relevance of these campaigns among immigrants	3.5	3.33	0.75
11	Reduced-budget campaigns	3	2.83	1.21
12	Campaigns with outstanding creative level	3	2.83	1.57
13	Important contribution of this type of advertising to the integration of immigrants	2.5	2.67	1.11
14	Use of sponsors to get the message across to immigrants	2.5	3	1.15

Source: Own creation

This highlights, on the one hand, the competitive advantage that will be maintained by companies that gave it a rapid response to immigrant market before the rise of immigration in

Spain, and the disadvantage of the companies that did not trust in time the consumption potential of the new residents and neither valued them enough as a segment of interest in their commercial campaigns. And, on the other hand, it shows the loyalty of immigrants towards brands that continue to include them in their commercial communication campaigns, which would lead us to insist that companies must assign advertising budgets to specific actions directed at this market, despite the economic crisis.

In addition, another proof that advertisers need to fairly value this population segment, which is still insufficiently catered for, is that the participating experts considered that there is still a low level of advertising saturation among immigrants, in particular of advertising specifically targeting them. This is a strength that should be maintained in the future, given that it is another advantage to take into account to estimate the profitability of the AFIS.

Other strengths experts consider, although without much consensus, that must be maintained in the next few years are: the use of a common language in most of the campaigns; the use of influential spokespersons in ads, often of the same nationality of recipients; and the representation of immigrants' cultural values to promote identification with their countries of origin. Finally, the experts do not see as important strengths the impact of this type of advertising among immigrants and the creative level of it. Similarly, they do not give much relevance to the role that AFIS has and should have on the integration of the new residents, despite this responsibility is often demanded by the academia.

The perception that the directors of ethnic agencies have of the AFIS varies significantly when asked about the deficiencies that this type of advertising has and must overcome in the next few years. Moreover, in this case the level of consensus reached in the Delphi survey is in general terms higher than the level achieved when experts were interrogated about the strengths of the AFIS (see table 2).

At a first level, there are three major deficiencies: the scarce resources advertisers assign for this type of publicity despite the numerical importance of immigrants in the population as a whole; the superficial and stereotyped character of many campaigns, which undoubtedly reflects their low level of creativity; and the poor translation of messages into the different languages of this multi-target.

This last deficiency could be contradicted by the use of a common language, which was identified by experts as a strong point of the AFIS. However, this is not so much of a contradiction as it is an appreciation of the use of a same language as operational advantage, and the acknowledgement of the need of moving forward in this area in order to talk to immigrants in the same way they talk in their daily lives.

Table 2. Main deficiencies that the AFIIS has and must overcome in the future

Rank	Item	Median	Mean	Deviation
1	Very small investment in relation to the size of the immigrant population	4.5	4.33	0.75
1	Messages too superficial and based on stereotypes, which is a result of the lack of knowledge about these groups	4.5	4.33	0.75
1	Lack of translations into the languages of the different groups, or be very literal translations, not well adapted to their cultures	4.5	4.33	0.75
2	Little innovation and little interest in experimenting with new communication tools	4	4.17	0.69
2	Insufficient adaptation of the strategies and messages to the particularities of each group of immigrants	4	4.17	0.69
2	Little involvement of the target audience in campaigns	4	3.83	0.69
3	Lack of ethnic specialists in the advertising companies	4	4	0.82
4	Absence of channels that effectively reach all immigrants	4	3.17	1.21
5	Advertising not always planned by experts in communication with immigrants	3.5	3.83	0.9
5	Frequent use of simple and little original creativity elements	3.5	3.83	0.9
6	Excessive segmentation of ethnic media, which makes them expensive	3.5	3.5	0.96
7	Too much use of identification resources such as flags or patriotic colours	3.5	3.5	1.26
8	Campaigns are too tactical and are not integrated into the advertiser's overall communication strategy	3.5	3.5	1.38
9	Limited economic capacity of the group, even more so in a context of crisis	3	2.83	0.69
10	Advertisers' campaigns are too profit-focused and do not reflect a real desire to establish firm and transparent relations with immigrants	3	3.17	1.07

Source: Own creation

Similarly, while the experts defend the significant degree of adaptation of the advertising messages to the different types of immigrants and the relevance that this should continue to

have in the coming years (as shown in table 1), they also openly recognise the need to achieve a greater degree of adaptation in the future. Thus, when asked about strengths the experts insisted on those aspects they saw as strong points of the AFIS, currently and in the face of the future, and precisely for this reason we believe it is necessary to continue exploiting and refining these strengths to a greater degree.

For this reason, in a second level, they considered that the important deficiencies that must be solved in the future are: the insufficient adaptation of the strategies and messages to the particularities of each group of immigrants, along with the deficiencies related to the aforementioned low creative level of this type of advertising (we refer to the low level of innovation, especially in the use of new communication tools) and the low impact of this type of campaign among immigrants (i.e. the little involvement of the new residents with the advertising directed at them, which is also highlighted as an important weakness).

They also stress the absence of channels that can effectively reach the whole of the immigrant population, in relation to what was said about the potential of the more segmented channels.

It is also notable that in the second a third levels of importance it is emphasised that a significant weakness that must be overcome in the coming years has to do with the professional management of the AFIS. Experts consider that the lack of ethnic specialists in advertising companies is particularly serious, and certainly makes the daily work of the communication agencies focused on immigrants more complicated. They also consider as a serious deficiency, the fact that the campaigns are not always planned by experts in this field, which reflects the uneasiness provoked by the hiring of people without proper qualifications in some areas of the sector.

Other weaknesses to be overcome in the future are: the frequent use of simple and little original creative work (which is coherent with what experts stated in other questions), the excessively high rates of segmented media, and, with less consensus, the abuse of identification resources such as flags or patriotic colours and the fact that the campaigns are not always integrated into the overall strategy of the advertiser's communication campaign, and are too often mere tactical actions. Finally, the leaders of the ethnic organizations do not consider that the limited economic capacity of these groups, even in a context of crisis, is very important.

Apart from getting to know the views of experts on the strengths and weaknesses of the AFIS, which must be reinforced or overcome, respectively, and taken as references in future advertising campaigns targeting immigrants, one of the purposes of this work was to examine the phenomenon of the so-called second generations, which just is developing in the present and will have a big impact in the near future. For this reason, following the idea of establishing the

ideal development of the AFIIS in the future, we interrogated experts about the key strategies that should be followed to communicate in the near future with these new generations of immigrants.

It should be noted that the rapid rise of immigration in Spain has forced advertisers and the advertising industry to jump on a fast train and therefore they have not always arrived in the best time or conditions. Children of the current adult immigrants are a new segment to consider differently from the native Spaniards and even from their parents. This is forcing all the actors involved in the business of the ethnic communication to identify the trends that must be taken into account in the future to properly communicate with this new target audience.

As table 3 shows, four of the six main strategies that, in the opinion of experts, must be followed to approach the second generations have to do with getting a better understanding of this audience. With a significant degree of consensus, the participants asserted that the key strategy in the coming years is to identify the second generation's habits of consumption and life in society and to learn more about their current situation, needs, aspirations and life expectations.

Other areas that must be further researched, according to the experts, are the communication channels, information sources, culture and origins of the second generations. Other strategies that were considered very important, and had similar degrees of consensus among experts, to be followed in the future by advertising focused on the second generations are: reflecting with normalcy the incorporation of this sector into the host society, address them with a respectful tone, and increase the advertising budgets spend on these segments.

In second place, the directors of ethnic agencies think that publicity focused on the second generation has to take into account the following aspects: that their cultural traits will be half way between their origin and the host society; that it will be very important for them to join and be accepted by the Spanish society; that advertising should portray them as already integrated into society and avoid pigeonholing them on the grounds of their nationality (although there is a greater degree of disagreement on this aspect among the participating experts).

All these key strategies could point towards the strengthening of a new type of advertising for immigrants that, although remaining segmented to reach these new citizens, goes beyond the reductionist stereotypes that are frequently included in campaigns for immigrants and paves the way for a scenario in which foreign citizens and their children are represent as fully integrated in society and in conditions of equality. This way, therefore, ethnicity would cease to be the central element on which the advertising message for the second generation revolves, unlike what happens in general terms in the advertising targeting the immigrant population as a whole.

Table 3. Key strategies to approach the second generation of immigrants in the future

Rank	Item	Median	Mean	Deviation
1	Identify their habits of consumption and life in society	5	4.83	0.37
2	Learn more about their current situation in Spain, their needs, aspirations and life expectations	5	4.5	0.76
3	Address them with a respectful tone that reflects the normalcy of their incorporation into society	4.5	4.5	0.5
3	Locate their communication channels and information sources	4.5	4.5	0.5
4	Assign larger advertising budgets to become more effective in achieving objectives	4.5	4.33	0.75
5	Learn more about the features of their culture and origins	4	3.67	0.47
6	Be aware that their cultural traits will be half way between their origins and the host society	4	4	0.58
7	Create events that make them feel integrated into society	4	4.15	0.69
7	Take into account their level of integration and their desire to be accepted by the Spanish society	4	3.83	0.69
8	Avoid pigeonholing them on the grounds of their nationality	4	3.5	1.61
9	Direct advertising campaigns to their families	3.5	3.67	0.75
10	Carry out social actions of corporate responsibility that promote their involvement	3.5	3.67	1.11
11	Take into account their budget	3	3.5	1.12
12	Pay attention to differences in values between men and women	3	2.83	1.57
13	Direct actions to the relevant influentials in their group	1	1	0.58

Source: Own creation

In another order of things, and continuing with what the Delphi experts consider desirable for the future of AFIIS, we believed it was necessary to ask them about the areas of the immigrant market that should be further researched in the coming years because:

a) this could tackle the lack of knowledge about the immigrant population. Not in vain when the experts referred to the shortcomings of the AFIIS they stressed the persisting ignorance about these collectives (they did so to justify as one of these major deficiencies the fact that messages were too superficial or stereotypical). The need for further research was also highlighted in the discussion about the keys to communicate with the second generation.

b) this could produce useful information to plan academic research on this subject and, in particular, studies to connect these academic areas with the real needs of the professional sector of advertising.

The results highlight the broad field of study on which the ethnic advertisers demand more scientific knowledge in the face of the future (see table 4), despite research on immigrants has advanced considerably. In particular, they claim that, in the coming years, research on essential aspects to design advertisements and other commercial communications aimed at these groups should be intensified.

In fact, the two most important areas that according to experts must be investigated to design effective communication strategies are related to the needs, values and insights of this target group and the communication codes they prefer. A significant degree of consensus was also reached in the third area which the experts believe must be investigated scientifically in the coming years: the consumption habits and shopping behaviours of the new residents.

In a second level of importance, the future of research on the immigrant population includes two other issues. On the one hand, the phenomenon of the second generations, about which, as we saw, there are still too many uncertainties. Interestingly, this issue was included as one of the points to be addressed in our work because we anticipated it would be transcendental but at the end it was not sufficiently addressed. On the other hand, the perceptions of immigrants about advertising; because in order to face the future of the AFIIS, our object of study, it is certainly urgent to learn more about the views of the new residents in order to use them as reference in the production of advertising campaigns.

In a third level, the experts point out many other areas, such as: vital expectations and horizons of immigrants; influential people and opinion leaders of the different groups (something fundamental to incorporate them into the planning of the campaigns); process and degree of integration in the Spanish society; and a greater knowledge of their cultural traits.

Also, for the future, experts also want to obtain more information about the peculiarities of the different groups, since the new residents are often addressed as a whole, when in fact they are very diverse cultural communities. In particular, experts believe it is necessary to further

investigate the Maghreb population, which is very important in some regions of the country; followed by the Chinese people, who are extremely unknown so far; and the Sub-Saharan population. According to the results, we can say that experts consider that other groups such as East Europeans and Latin Americans are much better known.

Table 4. Main areas that should be investigated in the future about the immigrant population

Rank	Item	Median	Mean	Deviation
1	Needs, values and insights	5	4,67	0,47
2	Characteristic communication codes	5	4,67	0,75
3	Consumption habits and shopping behaviours	5	4,5	0,76
4	The phenomenon of the second generations	4,5	4,5	0,5
5	Perceptions about advertising	4,5	4,33	0,75
6	The Maghreb people	4	4,33	0,47
6	Vital expectations and horizons	4	4,33	0,47
6	Influentials and opinion leaders of the different groups	4	4,33	0,47
7	The Chinese population	4	4,17	0,69
7	Process and integration level	4	4,17	0,69
8	Family behaviour	4	3,83	1,07
8	Their cultures, evolution and transformation	4	3,83	1,07
9	The Sub-Saharan population	3,5	3,33	0,75
10	Background and reasons for their migration process	3,5	3,17	0,9
11	Media consumption and use	3	3,33	0,94
12	Social and consumption trends in their countries of origin	3	3,17	1,21

Source: Own creation

Finally, from the assessments of experts we can deduce that ethnic agencies do not consider so relevant for their daily work to investigate issues related to immigrants' past of (background

and reasons for their migration process and the social and consumption trends in their countries of origin), or media consumption.

The latter is, without a doubt, essential to address effectively the new residents, but the answers of the expert participants suggest that this subject is already sufficiently developed, or at least to a greater degree than the rest of the items discussed so far. Information on this subjects has been provided, for example, by the *Estudio de Medios para Inmigrantes* (Study of the Media for Immigrants), carried out by the *Asociación para el Conocimiento de la Población Inmigrante* (Association for the Knowledge of the Immigrant Population).

In addition to the data obtained from the previous three questions about the ideal future development of the AFIS, this work also tried to get the forecast from the experts about the actual way this area will develop, since this is one of the potential uses of the method used.

The following section presents experts' forecasts about two important issues in this regard: the sectors for which the immigrant market (and communication directed to them) will be more important; and the trends that will characterise the future evolution of advertising directed at the new residents. As we will see, these forecasts are fairly coincident with the desirable evolution proposed by the experts in the answers to the first three questions.

From the opinions of the participating experts we can notice certain continuity from the main economic sectors that so far have been interested in the immigrant market.

While the first Delphi round integrated an open question, the second phase integrated a multiple-answer question that included in the response options the categorization of sectors used by the *Infoadex*. We also included a more specific response option, money transfer services, because of the importance that this business has traditionally had for the consumption of new residents, although not to an extent to be considered an economic sector. This was intended to identify more accurately the most important areas for the immigrant market.

The greater consensus among the experts when it comes to mentioning the main sectors for the future of AFIS was in reference to the telecommunications sector, followed, in second place by the food sector (see table 5). In third place are the automobile, insurance, transport, travel and tourism industries. Other economic sectors that are considered key to the future of the immigrant market are, in decreasing order: culture, education and media; public and private services; textiles and clothing; sports and leisure; money transfer services; and distribution and restoration.

Table 5. Main economic sectors for the immigrant market in the future

Rank	Item	Median	Mean	Deviation
1	Telecommunications	5	4.83	0.37
2	Food	4.5	4.33	0.75
3	Automobile	4	4	0.58
3	Insurance	4	4	0.58
3	Transport, travel and tourism	4	4	0.58
4	Culture, education and media	4	3.67	0.75
5	Public and private services	4	4	0.82
6	Textiles and clothing	4	3.83	0.9
7	Sports and leisure	4	3.67	0.94
8	Money transfer	3.5	3.83	0.9
9	Distribution and restoration	3	2.83	0.37
10	Real estate	1	1	0.58
11	Finance	1	1	0.82

Source: Own creation

On the contrary, the participants believe that real estate and finances will be the least relevant sectors, despite the importance acquired by the immigrant demand in these two areas in recent years, particularly in the last.

Regarding the trends that, according to the experts, will characterise the AFIIS in the future, it should be emphasised the high general degree of consensus reached in the answers. The most important feature has to do with the use of the Internet and new media (see table 6). Thus, they claim that, as it happens in the rest of commercial communication, in the coming years advertising targeting the new residents will make a greater use of the Web 2.0 moved by the advantages offered by this environment to communicate with consumers. From the answers given by the experts we can notice certain urgency in the renewal of the media used to reach immigrants, because in recent years the traditional channels have had a very important role.

Table 6. Main future trends in advertising for immigrants

Rank	Item	Median	Mean	Deviation
1	Increased use of the Internet and new media (virtual communities, social networks, etc.)	5	4.5	0.76
2	Increased knowledge and research about this target	4.5	4.5	0.5
2	Better adaptation of products to the real needs of immigrants	4.5	4.5	0.5
2	Improvement of the creative elements used in campaigns	4.5	4.5	0.5
3	Gradual integration of this target to conventional advertising as just another consumption sector	4.5	4.33	0.75
3	Better adaptation of messages to each group	4.5	4.33	0.75
4	Increase use of street and guerrilla marketing strategies	4.5	4	1.15
5	Increase use of experiential marketing	4	3.83	0.69
5	More constant and less sporadic or eventual campaigns	4	4.17	0.69
5	Micromarketing, greater segmentation	4	4.17	0.69
6	Increase in advertising budgets	4	4	0.82
7	Increased use of specialised media	3	3.33	0.47
8	Exploitation of advertising to contribute to the integration of immigrant groups	3	2.67	0.75

Source: Own creation

Other important trends are related to different aspects that have been already identified in the responses to the previous questions. Thus, the experts consider the following to be very relevant: the intensification of research to get a better understanding of the immigrant population, which is consistent, for example, with experts' concerns about the future strategies to communicate with the second generations; and the demand for more creative campaigns, which was repeatedly identified as a deficiency to be overcome in the future in order to achieve greater effectiveness.

Similarly, a key trend will be the better adaptation of messages to the real needs of immigrant sector and the characteristics of each sub-group that integrate it, as it was deduced from experts' opinions about the ideal development of advertising for immigrants. And finally, another trend will be the increasing integration of the new residents into the conventional campaign as just another consumption group; this shows the importance that will acquire the coexistence of advertising specifically designed for immigrants and their idiosyncrasies, and the generic advertising that dilutes the ethnic dimension as a result of the increasing integration of immigrants in the Spanish society.

Other important trends, according to experts, will be the increased use of the street marketing (which recently has acquired particular relevance for its ability to reach efficiently the new residents) and experiential marketing. Moreover, in the future the campaigns of AFIIS will be less sporadic or eventual (which pointed out as deficiencies) and more segmented; but not necessarily linked to ethnic variables, so this does not contradict the integration of immigrants to the conventional planning and is perfectly consistent with the use of communication 2.0 and specialised media.

All this will certainly happen with a more positive attitude from advertisers, which according to the participating experts will end up increasing their advertising budgets in order to reach more effectively all immigrants, which is something that throughout the Delphi process was pointed out as one of the keys to ensure the effectiveness of the AFIIS.

Finally, in line with previous statements, the leaders of ethnic organizations believe that in the future advertising directed at immigrants will not aim to contribute to the integration of these groups into the Spanish society, either because they consider that advertising is not useful in this regard or because they think that this is not a function of commercial communications.

4. Discussion and conclusions

Since we have already outlined the main results of the research, this last section will synthesise the general conclusions that can be drawn from those results and will try to generate debate on the subject. Based on the assessments made by the experts, we highlight the issues that we believe are important to substantiate strategic recommendations to achieve a more effective advertising for immigrants. The significance that, according to different agencies, the phenomenon of immigration will continue to have in Spain justifies the analysis of the improvements suggested by the directors of the ethnic organizations that participated in the Delphi panels.

Firstly, more creativity. In the coming years the advertising campaigns for the new residents will make a greater effort to reach a higher creative level and gradually move away from the simple and little original creative elements that have often characterised them. The future of the AFIIS is experiencing a major innovation in the design of messages and the use of new communication tools. This effort corresponds to those responsible for the professional management of commercial communication, but must be endorsed by advertisers. In fact, the former group openly acknowledges the need to improve the creative level of ethnic advertising.

Secondly, therefore, more investment. It is still urgent for all the companies to value positively the immigrant market and devote more resources to communicate with them, especially because of the loyalty shown by the new residents to the brands that cater their needs. Since this phenomenon will continue to be highly relevant in the Spanish society in the next decades, the business sector will progressively become more aware of it, as it has happened in other countries with a longer tradition of immigration.

Thirdly, more adaptation. Although ethnic advertising has proven to be quite flexible to adapt their messages to the concerns and needs of the immigrant market, in the future there will be a greater degree of adaptation of strategies and messages to the particularities of the different groups that make up this market. The recent phenomenon of immigration in Spain justifies the fact that this process is still underway, although some companies have been able to adapt their strategies quickly to the changes provoked by immigration. Something different is the debate about the degree of reinforcement of ethnic elements that this adaptation will involve in campaigns.

Fourth, more integration. In the sense that in the future advertising messages will abandon stereotypical representations of the new residents and will reflect with normality their incorporation into society, without pigeonholing them by their status as immigrants or their nationality. This, which is compatible with a greater adaptation to their needs, will acquire especial relevance in the case of the second generations, who are halfway between their cultural origins and those of the host society. Other prominent trends will be that ethnicity will no longer be a central element in campaigns and that the immigrant profile will be incorporated as any other profile in the planning of all kinds of campaigns.

Fifth, more research. The future of the AFIIS will involve more research on the immigrant market, especially about their needs, values, insights, and communication codes. Other subjects that will continue to be essential to be researched are: immigrants' consumption habits and perceptions of advertising, the phenomenon of the second generation, and the still unknown communities.

Sixthly, more professionalisation. Undoubtedly, the work done by the ethnic agencies is serious and essential for the positive assessment of immigrant market, but in the future they must improve this aspect, in terms of the lack of ethnic specialists in advertising companies and the occasional hiring of people without proper qualifications in the sector.

Seventh, more digitalisation. AFIS will increasingly exploit the potential of the new media and the Web 2.0, because immigrants are significant Internet users. Interactivity, viral advertising, the proactive role of the consumer in these media and the dialogic character of these media are some of the advantages of these new technological environments that some companies have already begun to explore to communicate with immigrants. However, without a doubt, the digital media are a challenge that will change to a higher degree the strategies and practices of commercial communication with the new residents, as it is also happening with other segments of the population.

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