Spanish Advertisers and the New Communication Context: A Qualitative Approach

Juan Benavides Delgado, Ph. D. [C.V.] Chair of Audiovisual Communication and Advertising, Department of Audiovisual Communication and Advertising I, Faculty of Information Sciences, Complutense University of Madrid, juanbenavides@ccinf.ucm.es

Nuria Villagra García, Ph. D. [C.V.] Professor of Audiovisual Communication and Advertising, Department of Audiovisual Communication and Advertising I, Faculty of Information Sciences, Complutense University of Madrid, nuriavillagra@ccinf.ucm.es

David Alameda García, Ph. D. [C.V.] Assistant Professor to the Chair, Faculty of Communication, Pontifical University of Salamanca, dalamedaga@upsa.es

Elena Fernández Blanco, Ph. D. [C.V.] Assistant Professor to the Chair, Faculty of Communication, Pontifical University of Salamanca, efernandezbl@upsa.es

Abstract: This article analyses the current way advertising is run by Spanish advertisers, as well as the tendencies and new working outlooks for the next few years. The current changes taking place in advertising communication are the starting point for this research project of an applied nature, whose results are presented here. This context of change is characterised by technological advances, the hegemony of the consumer, and changes in the media, professional routines and the relationships and structure of the corporate advertiser. The main objectives of the research were to understand the role of advertising within the general structure of the company, analyse the relationship of the advertiser with the agents involved in the communications industry and identify the main problems which are causing the present system of advertising to move towards new working methods. Using qualitative methodology –in-depth interviews of major Spanish advertisers– as a basis, we proceeded to the analysis of the main subject areas in the way advertising is run by the advertisers and the discourses which articulate the advertisers' understanding of the practice of communication.

Keywords: advertisers; trends in communication; advertising; consumer; brand; strategy.

Summary: 1. Background. 1.1. Introduction and historical context. 1.2. T he changes being forced upon the advertiser. 2. Research into the way advertising is run by the advertisers. 2.1. The objectives of our research. 2.2. Fundamental lines of inquiry. 3. Main conclusions and some recommendations. 3.1. Conclusions. 3.2. Recommendations. 4. Bibliographical references. 5 Notes.

Article translated from the original Spanish by **Dr. Fiona Robb**

1. Background
1.1. Introduction and historical context
Communication is not what it used to be, even less so communication in the form of advertising. The new global economic environment, the far-reaching changes in the mass media and the development of technology, with the resulting central role assumed by individuals in their relationship with brands, are just some of the factors directly affecting communication and advertising in recent years. The advertising system, already submerged in a type of permanent crisis going as far back as 1993, has been forced to modify not only its working processes and discourses, but also the very content of the advertising concept. In fact, the changes experienced in the communication society, the media environment and the organisations themselves, not to mention in the audience –ever more fragmented and individualised– derive from a general "crisis" in the context of advertising communication which has manifested itself in new concerns and the redefinition of traditional advertising practices by advertisers.

In this sense, there has been move away from an advertising practice centred on commercial objectives and transmitted via conventional advertising media towards a global dimension to advertising, with *distorted formats*, [1] in which a special role is played by senders and recipients, the interaction between the two and the growth of alternative media which ensure communicative effectiveness (Benavides and Villagra, 2009; Alameda, 2006).

Furthermore, the increasing scepticism on the part of corporations in relation to traditional advertising methods, the changes in their own corporate structures and the decline in the effectiveness of the relationship with their audiences (ever more fragmented and individualised), is producing new and complex expectations on the part of the corporate advertiser which are focused on the construction of a proprietary and unified identity with the capacity to define the advertiser's brands in the ideal environment of interaction with its various audiences. In view of all this, advertisers are

beginning to experience important changes in their concepts, working processes, structures and relationships with traditional advertising agents (advertising agencies, media agencies, mass media) in such a way that the high degree of specialisation in communication and advertising among advertisers is causing the actual role of the advertising agency to be redefined, which means taking on board a more direct role in organising communication.

In this paper we present a collection of reflections and conclusions which are the direct result of research carried out from within the Spanish Association of Advertisers (*Asociación Española de Anunciantes*, AEA). [2] However, new material has also been added which we believe is the result of the same research. This was not included at the time so as to remain within the research's proper scope, context and objectives but nevertheless undoubtedly forms part of it and relates to the concerns we observed among advertisers themselves.

1.2. The changes being forced upon the advertiser
The situation briefly summarised above explains the kind of bewilderment and uncertainty currently experienced and expressed by the advertiser in conducting communication and more specifically advertising. In our view, the advertiser regards itself with no choice but to deal with a series of changes which are affecting the diverse interlocutors in the communicative process and which require diverse approaches in terms of both definition and analysis and are affecting its decisions. We will briefly describe these changes.

1.2.1.Changes in the media and the techniques applied
The principal and most important change is that affecting the media themselves. It is no longer appropriate to understand communication as a directional process in which a social sender-advertiser conveys information or, in advertising terms, sets out to persuade a recipient, that is, a consumer. This way of understanding the process belongs to the past. So too, however, does the combination of conventional formats (ATL) with unconventional (BTL). These concepts and models continue to be used more out of habit and convenience than anything else. Far from explaining the reality, they obscure it. Nowadays the processes of communication are more direct and interactive between companies and social groups, all of whom are much more knowledgeable about what advertising signifies and represents and the very notion of the media**.**

Given this situation, the advertiser seeks out new formulas which allow it to communicate with greater effectiveness and using a creative approach that combines form and content. This requirement explains the appearance and development of new formats and supports, [3] and the integration of different modes of communication into the traditional supports . And while all this is going on, new questions arise in the advertiser's mind, ranging from the role which marketing ought to assume within its company to the demands of a consumer who *knows* a lot more about what communication and advertising is all about and, moreover, interacts directly with it. Consequently, a deeper knowledge of the consumer has become absolutely indispensable given that the consumer's behaviour is changeable and does not follow the traditional patterns which have traditionally served as a reference point in marketing.

1.2.2. Change in the communications industry

Given what we have just said, and as a consequence of these new communication *scenarios*, the communications industry is undergoing important changes which are calling into question the established routines of the profession. We will single out four of these as fundamental:

- The emergence and development of new platforms and communications tools, such as the internet, mobile telephony and digital media.

- The gradual concentration of agencies and other companies operating in the industry into large corporate groups (Mattelart, 2000).

-The increasing saturation in advertising, which spurs the search for new supports and ways for corporations to make contact with their various publics, as well as a breakdown in and *hybridisation* of traditional formats in favour of the development of new modes of communication within the ambit of digital technologies.

- The new role of the recipients, who are being turned from the passive subjects in the entire communication process into its leading players.

1.2.3. Changes in the corporate advertiser's relationships and structure
However, these changes, which are affecting the different agents in communication, are directly influencing the advertiser and its understanding of its role and relationships with advertising agencies and other media-related suppliers as well as with consumers themselves.

The loss of trust in conventional commercial communication (Infoadex, 2008) has led the advertiser to seek out more novel techniques (with names as varied as advertainment, branded content, viral marketing, guerrilla marketing, street marketing, etc.) and more direct ones, among which public relations, direct marketing or events stand out.

To this vibrant landscape can be added the development of new areas of communication management in the company –corporate communication and internal communication– which are targeted not just at consumers but a much wider and global public. The simultaneous functioning of these three areas (commercial, corporate and internal), which is sometimes run from within different departments, requires a redefinition of the corporation's communicative structures aimed towards the manufacture of more coordinated and coherent messages (Villafañe, 1999). As a result of this new performance context, the role of marketing itself is redefined, both in terms of its approaches as well as its focal points

and objectives. On the one hand, an orientation focused on people with highly individualised profiles, [4] and on the other, the actual role of the department and its relationship with the other areas in the company (Aaker, 2008). The director of marketing should opt for *transverse management*, which means working in an integrated way with other departments in the creation of a brand with a coherent experience that transcends the intrinsic value of the product.

There is no doubt that this situation requires a new approach to the very concept of advertiser, who is gradually integrated into a much more complex communicative reality within the organisation itself; its communicative role being more professional and involved in the development and definition of the company's communication strategy. Specialised companies are moving towards being simple companies serving their own needs.

1.2.4. Changes in the different audiences
The recipients of messages via the media are more fragmented and their behaviour can no longer be explained on the basis of variables allocated by means of traditional segmentation (sex, age, place of residence, social class, etc.). At the same time, the average consumer is a lot more exacting and demands a personalised treatment, i.e. he wants brands to address him in a direct and individualised way.

The individual has, in a manner of speaking, immunised himself from commercial messages, manifests a certain degree of knowledge about marketing and distrusts the intentionality of advertising messages and the strategies of brands. Moreover, the individual has acquired greater experience over time in his relationship with the media and avoids advertising messages (especially in conventional media such as television, radio, cinema and newspapers), thus neutralising the communicative efforts of advertisers; the latter, conversely, are forced to seek out new formulas for addressing this new generation of consumers (Boschma, 2008) or "*crossumer*" (Gil and Romero, 2008). The individual therefore prefers more direct and participative forms of communication in which he can take on an active role and get involved when he wants to (Martí and Muñoz, 2006); furthermore, consumers have become senders of commercial messages or "*prosumer*s", thus actively participating in the story of constructing a brand (storytelling).

From this point of view the advertiser ought to define new forms of making contact with its different audiences by using more intimate communication codes. This fact also explains the use of messages more focused on values and emotional aspects in commercial communication.

2. Research into the way advertising is run by the advertisers
2.1. The objectives of our research
Summarising what has been said so far, it should be stressed that the models, agents and the role of the interlocutors in the processes of commercial communication are changing. Thus the advertiser finds itself submerged in uncertainty and distrust. This is the situation in which advertisers and corporations are operating and which the various agents in the advertising process are having to deal with; for that reason we have identified the need to investigate the new reality of the advertiser and, above all, identify precisely what point which this set of questions has actually reached. These were the initial framework and objectives of the research carried out during 2007 [5] from within the milieu of Spanish advertisers.

Our objective in addressing these concerns is to study the way advertising is run at present by Spanish advertisers and to define the tendencies and new working perspectives which can be detected for the following years. Our specific objectives can thus be summarised as follows:

a) To investigate the role of the advertising task within the general structure of the firm. The aim is to study the function played by the practice of advertising in the communicative development of the advertiser, identifying the location of the advertising department and its relationships of dependency within the corporation as a whole.

b) To analyse the relationships of the advertiser with the agents involved in the communications industry: advertising agencies, media agencies, marketing services agencies, etc. To pursue the study of the process of account allocation, degree of collaboration in the strategic and creative development and of the media, etc.

c) To identify the main problems that are redirecting the current system of advertising towards new working processes.

The research thus takes place in three phases:

1. Exploratory phase: consisted in the examination of secondary sources (the most important publications in the industry) with the aim of outlining the current advertising situation and its problems, as well as defining the sample of advertisers to be interviewed and the research variables.

2. Phase of design of methodology and fieldwork: the research methodology and the development of the fieldwork were defined based on the previous phase (see Table 1). Qualitative methodology was used based on carrying out 20 in-depth interviews of large-scale Spanish advertisers. In implementing this phase, the realisation of *semi-structured in-depth interviews based on a questionnaire* was selected (Patton, 1990 and Vallés, 1999).

Table 1: Technical file of the qualitative research

- Set: Advertiser members of AEA
- Sample: 20 interviews distributed by sector

Food / Drink	6
Automobile	2
Distribution	2
Electronics	2
Energy	3
Finance	1
Cleaning / Retail	2
Telecommunications	2
Total firms	20

- Technique: Semi-structured in-depth interviews based on a questionnaire lasting approximately 1 hour
- Duration of fieldwork: 2007 (one year)

The questionnaire developed for each interview consisted of five main blocks of subjects:

a. THE WHO of the interviewee.

b. WHERE IS COMMUNICATION LOCATED IN HIS COMPANY.

c. WHAT TYPE OF COMMUNICATION IS REALISED.

d. HOW DOES HE VIEW THE COMMUNICATION CONTEXT.

e. THE FUTURE.

3. Analysis of the data based on established variables: in this phase the transcriptions of each interview were analysed, applying the technique of *discourse analysis* and determining how representative the discourse is on the basis of the degree of *discursive saturation* consistent with that methodology (Van Dijk, 1997).

2.2. Fundamental lines of inquiry
The analysis of the interviews carried out highlights some data explained briefly here. We have divided the results into two main sections. Firstly, we set out the principal conclusions obtained from the analysis of each one of the subject areas which the advertisers were asked about in the interview questionnaire. Secondly, we set out the discourse detected on the basis of the transverse analysis of all the interviews.

2.2.1. The management of advertising and communication at the advertisers
2.2.1.1. Features characterising the advertiser (who): the new advertiser
There is no consensus on this point, the origin of the interviewees is extremely diverse, the most frequent factor being that their background has involved holding a variety of positions within the advertiser or that that they have previous experience at agencies, particularly advertising agencies.

The title of the interviewee's position is different in every case, only coinciding in the case of two of them. In other words, there is no agreed or more common title. We can mention some of the titles used to define this position: Director of Advertising, Director of Image and Advertising Communication, Director of Institutional Communication and External Relations, Director of Corporate Marketing and External Relations, Director of Communication and Public Relations, etc.

As regards the capacity for decision-making and autonomy when it comes to implementing communication plans and specific interventions, two tendencies in particular can be observed:

* The interviewees do not have autonomy, usually the result of the fact that they share the running of communication with other areas that are independent and even, in some cases, play a more important role within the organisation (insofar as advertising and communication decisions are concerned). In other instances, this is the result of the corporation's own global strategy (as can be observed at some multinationals), whereby very specific guidelines applying to all countries are set by corporate headquarters (three of the companies analysed fall into this category).

* D ecisions can be taken with autonomy. In this case the position held is located within the corporate structure at a high level, allowing the individual to take decisions and operate independently. This situation is particularly observed among the interviewees who depend upon or form part of a centralised communication department or in those cases in which, although dependent upon marketing, the running of communication is considered independent and has its own budget.

2.2.1.2. Where is communication located within the company?
In the majority of cases the job of advertising operations is dependent on marketing (except in those companies, three in this study, in which the interviewees work in a centralised communication department). However, there is no clear structure, the organigram in place is different at each one of the advertisers and is adapted to:

- the productive activity of the company concerned,

- its scale (national or international) and

- the importance played by communication in that company.

What can, however, be clearly observed is that the handling of communication in the company reflects a fragmented structure, meaning that different departments or areas of management within the company will be dealing simultaneously with the same issues albeit from different points of view (specialising according to product lines, communication areas, tools of commercial communication, etc.).

"…it is very common that within the marketing departments it is the brand managers themselves who deal with communication of the product. I'm not saying that … there are, which don't work well. From that point of view, in fact, I think that there are examples of brands, major brands, with good communication which are managed by the director of marketing … but obviously as far as I'm concerned the ideal situation, partly because of my professional background, is … for me to concentrate on the field of communication, isn't it?"

"we pick up the baton and, with a designated budget and marketing objectives, we establish what the best communication strategy is".

"The objectives, the target public, the techniques, the methods, even the budgets are different in each business division".

The relationship with other departments is not always clear and sometimes even reveals rivalries, particularly where the marketing department is strong. In such cases, each brand manager will aim to run the communication of his brand.

Whenever other points of reference in the communications industry are referred to (agencies, consultancies, etc.) the advertiser considers that he has taken on a larger role and specialisation in managing the communication of his company in recent years and therefore no longer delegates all the strategic decisions to others. The extreme of this position is reflected by one of the advertisers interviewed who defines his company as an "atypical advertiser" and this is because it has integrated an advertising agency into its actual structure and even has its own departments of production.

Although most do not carry out such an all-encompassing role, it is nevertheless normal for the advertiser to become more involved in advertising and communication decisions but engage the services of different firms to assist him in this task. Three types of collaborator can be particularly identified in this regard:

> * Advertising agencies. Many of these are dominated by "creative agencies",highlighting the fact that, compared to the integral services which these agencies provide, the advertiser's perception places most value on creativity in the strict sense. The advertisers also tend to define them as structures with little dynamism or flexibility as regards their needs, generally associating them essentially with advice on conventional media. The advertisers usually work with several at the same time or hold occasional tenders to select the most suitable one.

"… there's an agency for everything … the creative ones are obsessed with the spot and don't pay any attention to unconventional media … you always need at least four agencies …"

"The agencies are trapped in their own // web which they have spun themselves, they no longer have the capacity //, I mean, look at this way, they have a model which continues to work for them but which they themselves realise doesn't have a future, doesn't have a future. Because they have competed in a series of things, they have // they've gotten into a muddle and now they can't solve it. I mean, I think that right now you would have to get rid of everything and start from scratch. But of course, how do you start from scratch?"

"yes, the creatives get the briefing. The person from accounts looks at it and the creative. The creatives will leave out the people from accounts if //, they don't need them . They don't have time and so on, so sometimes it suits them to say 'run and tell him' but they ignore them as much as they can …"

"… the creative agencies are the same ones there's always been … the media agencies are more integrated"

> * Media agencies. These are highly valued and perceived. They represent a source of innovation and consultation for the advertiser as regards new tendencies and creativity in the media.

"Search for creative ideas, innovation, based on the media".

"Media agencies are supporting a huge amount of information, with extreme rigour"

"The one who is dealing with this the best in the situation so dramatic that …. that … for what has been experienced [...] um, I think it is the media agencies. I think they are the ones who have best understood that new solutions, new quests were being demanded. //And I think the only thing that is missing from the media agencies is, um, improving on their creativity. Well, but some of them already have creatives, right?".

> * Specialised agencies. The advertiser will very often contact these firms in order to complement his communication campaigns because he understands that they provide the company with a more specialised and flexible service than the full-service advertising agencies.

"they help us a lot (referring to full-service agencies) in audiovisual communication, in the press and in the radio, outside, less, they don't like that as much, and in BTL, zero. In fact we have everything with smaller agencies because the big ones, the thing is // you say to the big players that they have to do a publicity poster or practically a page in a newspaper and // they just don't do it for you. So, it's just a nightmare and a torture and you pay a massive fee for that service which then they don't give you. It's a lot cheaper, more flexible and they take care of you a lot better the much smaller BTL firms".

2.2.1.3. Type of communication undertaken by the company
The advertiser places greater importance on the brand as opposed to the product and tends to associate it with emotional factors. This is a tendency acknowledged by all the interviewees. However, while some state that they have been doing this for some time, others admit that they have only recently started to link their brand with emotional factors.

"… we have started with conceptual values, but still not much …"

"The fundamental asset we have are the brands, the perceptions".

Perhaps the area in which the above assertion needs to be qualified is in the food and distribution industries. In these cases, the brand is particularly associated with products or services provided by the company.

"Our communication is more promotional than based on the brand"

"we don't want to conduct those kind of campaigns that nobody can understand, our advertising is highly informative"
"The greatest value that the actual products have as such is the brand they bear"

All of the advertisers in the study say they use conventional and unconventional communication tools. Despite doubting the effectiveness of the mass media and not considering them to be an effective formula for addressing their audiences, they all use these media and understand them as an indispensable tool for "creating an image" and "creating a brand" (they particularly single out television). To a certain extent they accept this lack of effectiveness as the lesser of two evils and realise that they need to be present in these media because the other advertisers are there and because, moreover, they continue to be an excellent formula for reaching a wide audience.

"If we use conventional advertising it's out of inertia and because we're still afraid of the new …"

"the television campaign, which is always a bit like the point of entry for any message which you want to bombard the population with".

As a way of counteracting the saturation of advertising spaces in the conventional media and attempting to capture the attention of the different audiences, the advertisers are electing to use unconventional formats in conventional media, which give them greater relevance and notoriety (infomercials, mentions, internal ads, morphing, false cover pages, etc.). It is in this respect that they see the media agency as carrying a consultative and advisory role much superior to that of the advertising agency.

They all agree in the view that unconventional media reach a audience more directly, but the advertisers use them less. The most frequent media mentioned are:

> * Events

> * Promotions

> * Direct marketing

> * Sponsorship

> * Internet despite the fact that within the industry it is considered a conventional medium, it is cited by some advertisers in this category.

"Traditional advertising, as it has been understood until now, is in crisis … I think more and more you have to go in the direction of greater segmentation. You have to segment the mention really well, know who to target it at, choose the audience …" "There are more tools, more media".

In some cases the means of measuring the effectiveness of campaigns undertaken in unconventional media is questioned:

"the problem with these alternative forms of advertising is that it's difficult to evaluate their effectiveness"

"The mass media have the advantage of notoriety and the disadvantage of segmenting very little and the media which segment then waste or don't exploit the aspect of notoriety, the noise which we companies need today, whether we like it or not, which the mass media have".

Corporate and internal communication is not managed directly by the interviewee. Internal communication tends to be run by the Department of Human Resources and corporate communication is usually associated with areas such as the Department of Communication Management, External Communication or Institutional Relations. At seven of the interviewees the latter is particularly associated with Public Relations activities. As can be seen, the different areas in charge of communication in a company tend to be separate and in many cases depend on different management departments, having no relationship with one another. In fact, in most cases the interviewee is not familiar with the initiatives or campaigns being carried out by these areas.

Finally, in this section the central role given to audiences must be emphasised. In this regard, there are two ways of understanding the idea of "audience" and the relationship established with it:

Communication in the widest sense: from this point of view the corporation understands that everything that it does is communicated and aimed at the consumer but also other audiences with whom it has a relationship (stakeholders). The management of widely varying aspects is considered relevant (customer service, products, brand management, internal communication, etc.).

"we have always tried to ensure that communication activities are coherent when it comes to sending messages to all groups"

"… So communication is everything and communication is therefore the way we behave with people, our personality, in other words, wearing a tie, not wearing a tie …"

Commercial communication: particularly focused on dialogue (as opposed to the monologue which used to be the case) with the consumer. It is therefore a form of communication to aid marketing and especially aimed at customers.

"The customer is practically the only benchmark"

"it's no longer a question of simply sending out a message, it's about having a dialogue with the consumer. And dialogue means that your opinion and your voice count as much as the consumer's, … if not more than the consumer's, because in reality the person with an interest is you".

"we have a duty to respond to what the consumer is asking for".

2.2.1.4. The communication context
The advertiser in general conducts various studies analysing competitors, the consumer, etc., but all of these are focused on obtaining better knowledge of the environment with a view to directing commercial and advertising activity.

"… we start with in-depth research of the sectors of the public and increasingly look more towards the stylists, opinion formers … before television … because they enable a suitable ranking for reaching the consumer … whoever stays with classic advertising isn't doing well".

The advertiser does not, however, have a point of view about his company's position as advertiser and is usually unaware or pays little attention to other advertisers. In this sense, it can be concluded that there is no self-perception of a group with shared problems and challenges.

"… industry itself doesn't know what it has in its possession … it's guerrilla warfare"

There is a certain amount of scepticism about the effectiveness of measurement formulas, especially because of the exponential increase in media supply in recent years (particularly in television, but also in new media as previously pointed out above) which make the advertiser's media planning strategy vastly more complex.

"There is a pretty major debate about how to evaluate the different media, which are so different".

"we will have to change the form of purchase" (referring to the increasing number of television channels)

"I think that the media are going to have to evolve massively … the television channels, right? // um [...] we really have, I mean, um so many of us advertisers, the impression that they are making fun of us"

If we analyse the opinions of the interviewees in relation to the notion of effectiveness, we can note three points of focus or different forms of understanding this:

The effectiveness of advertising is related to the sales achieved.

"People continue to give priority to creativity rather than accountability. Creativity is in decline".

A connection is made with the results of notoriety and image studies.

"There is no evaluation of communication sales. All the trackings we have relate to image, how to improve the image".

The belief is that the effectiveness of advertising is based on obtaining notoriety that translates into sales. This last position is thus a combination of the previous two. Creating a strong brand allows one to achieve growth in the business line (Apple is cited as an example, with a small market share due to its product specialisation, but which, with the launch of the iPod, aimed at a wider public, has enabled it to grow).

As regards a diagnosis of the current situation being experience by agency and advertiser, all those interviewed support the specialisation of the advertiser and argue for a more active role to be taken by the agency (in particular, the advertising agency). They particularly call for exploiting the creative and strategic aspects (planner).

"it's really an opportunity and in my case, I for one see it like that, for us, from within the advertiser, to take control of the [...] of the brand".

"the market dynamic, including, I think, the dynamic of the advertisers themselves we have been responsible // that all of this has split up, right, and have caused the agencies to become providers of a very narrow vision of very specific things, so, at the end of the day what mattes to the agency are the ads and to someone else it's direct marketing that matters, and to the next person something else, whatever, and then another person and so on. So we have split it all up in such a way that it's extremely difficult to make it coherent. // They aren't any providers doing this for you".

They perceive a high level of saturation in the market both because of the competition between the companies themselves and the saturation of the mass media. This makes it considerably more difficult to achieve notoriety and become a relevant brand for the consumer.

Their discourse is generally extremely conservative and not very critical of the system and the structure adopted by their own department within the company. They do not put forward alternatives or suggestions for change.

"the building is built the way it is and we can do what we can but no more, right?"

2.2.1.5. The future
All agree in identifying that at present a series of important changes is occurring which will continue into the future. The aspects most singled out in this context are:

- Importance of the consumer

- New technologies understood as an opportunity for using new media and developing forms of communication that allow corporations to reach their audiences.

"We are witnessing not the beginning but in fact the continuation of a small revolution or a particularly strong evolution of many aspects in which the two the fundamentals, in my opinion, are the new consumer and the new technologies and … maybe they aren't two different things, but one and the same … two different aspects of the same thing".

"… all this technology, I think, is going to provide us with a multitude of alternatives, opportunities to improve our communication with all consumers".

Within this tendency it appears clear that the consumer will adopt an increasingly more active role. This makes it necessary for the advertiser to look for new formulas of communication based on dialogue and which allow the segmentation into different publics, who demand a more individualised and personal treatment at the same time as rejecting the current saturation of advertising.

"we want to establish relationships with consumers … we hope this will be two-way in the future …"

In some cases these decisions appear to offer the consumer the chance to use his own means of expressing himself by making use of new communication channels such as the internet or mobile phones.

"Right now the best thing you can do is leave things in his hands … the best weapon of persuasion is that the consumer himself is the one who talks about you, the one who makes you go VIRAL on the internet, the one who sees your audiovisual messages in YOUTUBE and sends them to his friends".

In this constant process of change and adaption, innovation and creativity become fundamental values for the advertiser. For this reason the advertisers considers them as necessary in their daily work and demands them of the other agents in the advertising system (advertising agencies, media agencies, mass media).

"we look for creativity, innovation and notoriety"

"Market … extremely complex … very difficult … quickly changing as well, where the ways of doing advertising, producing communication, establishing contact with the consumer are changing at a rapid pace. And where as well new formulas are appearing every day and perhaps the fact of being new … is being rewarded … like a value … since every day we have to be trying to invent something new ..."

Moreover, in this relationship with its providers, especially in the case of advertising agencies, the advertiser demands greater adaptation to his needs.

"we have moved from a situation in which collaborators, um … could be used for everything, to one in which we have been increasingly demanding greater specialisation, right [...] um ... but now can't use everyone for everything. // There are … a lot of agencies which have taken years to grasp this, I think there are still some at the stage of understanding this and of … let's say, adapting themselves to the real situation of the advertiser, you see"

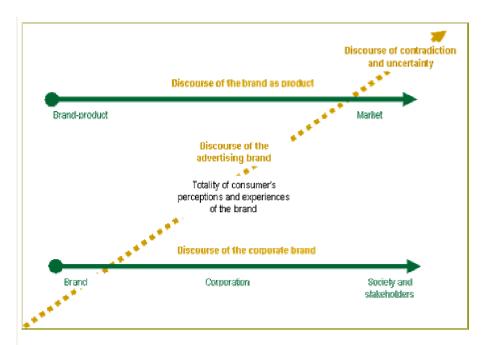### 2.2.2. The advertisers' discourses

The analysis of the interviews shows four ways of understanding and articulating the practice of communication by Spanish advertisers (see Table 2). It is important to point out that these are not exclusive modes of understanding communication nor do they form sealed compartments, but rather that one form of conceiving of and understanding advertising predominates in a given advertiser's language, although this may share certain features with other discourses (the term "discourse" is applied to these different languages for the purposes of this research).

Table 2. The advertisers' discourses

- Discourse of the brand as product: *the marketing of brands.*
- Discourse of the advertising brand: *the brand as a relationship space.*
- Corporate discourse: *the value of the brand.*
- Discourse of contradiction and uncertainty.

Discourse of the brand as product (the marketing of brands) represents the discourse most linked to the commercial plane of brands and for that reason appears represented in parallel with the *corporate discourse* (the value of the brand), which is more focused on handling communication as a whole. Between the two of these is the *discourse of the advertising brand* (the brand as a relationship space), which, from an intermediate plane between the commercial and the corporate, sees the essential objective as securing a direct and everyday relationship of brands with the consumer. Cutting across all of these is a type of *discourse of contradiction* (see Table 3).

Table 3. Main discourses

Source: the authors.

2.2.2.1. Discourse of the brand as product: the marketing of brands

This discourse, designated as *marketing of brands*,is the most recurrent one among those advertisers who see communication as a tool serving their products. It is the most conventional view of advertising in which the brand's values are associated with the nature of the product or service being offered. It is a discourse which is highly conditioned by the industry to which the advertiser belongs, given that industries such as food, drinks or beauty and hygiene, among others, are strongly characterised by the features and distinctive qualities of the product.

Seen from this perspective, the consumer becomes the sole point of reference for the corporation, but essentially for the purpose of creating and innovating in products and services and less so in terms of managing the corporate brand. Market research is the crucial means of identifying new needs and use of products, and for adjusting marketing policies by personalising what is being offered. Nevertheless, the *value* remains focused on the product/brand and not on the customer. The communication handling of brands revolves around the value of the product, thus bringing us towards the concept closest to transnational marketing, the marketing of "brands".

"The commercial element is the only thing that matters to us and so the customer is the sole benchmark"

This view generally corresponds to those advertisers at companies whose *organisational structures are typically market-oriented*, which have marketing and advertising directors, and in many cases, positions such as that of brand manager, product manager, etc. The internal organisation corresponds to a model built around the products and brands. In this organisation, the marketing and advertising departments appear highly differentiated and even removed from new departments of communication or institutional communication more associated with the area of human resources.

In terms of the type of advertising communication undertaken, large-scale advertising campaigns are carried out in which conventional media continue to take up a significant part of the advertising budget with the objectives of maximising coverage and notoriety for the targets. The use of BTL is part of the strategies, but more as a means of support to obtain the defined objectives in advertising plans.

2.2.2.2. Discourse of the advertising brand: the brand as a relationship space

This is the most common discourse among the advertisers interviewed and is also that which generates the most uncertainty and which appears to characterise the approach in the future. The keys to understanding this vision of communication are determined on the one hand by the management of the brand based on its emotional values, and on the other, by the ongoing quest for brand experiences with the consumer. Unlike the previous discourse, the brand's values correspond to the emotional and not rational plane of the product. In this way, the brand projects its values towards consumers, attempting to generate points of contact inside and outside the media and in ultimately generate "engagement" with the brand. In other words, the brand is part of the daily lives of its customers because

"… the brand is different for each person, because it is built in relation to the experience of each one of them. The aim is to try to make the brand experience cumulative".

"The key is that the brand is ultimately part of people's lives in an absolutely natural way".

In this discourse, the customer is the central factor, even over and above the product's own value. We are dealing with a vision close to the philosophy of relationship marketing in which the value of a customer's life is enhanced whereby

advertising communication works towards this objective using all media, channels and available forms of communication, no longer aimed at the target, but at the consumer as an individual subject.

Controlling the brand strategy is perceived as the advertiser's responsibility, who by means of integrated media strategies seeks to generate the maximum number possible of points of contact with the consumer. However, despite the fact that the strategies are planned and designed by the advertiser, the latter is aware that the consumer has changed radically and is now capable of constructing the brand from new spaces outside the advertiser's control (new concepts such as the blogosphere, viral marketing, virtual communities, word of mouth are included here). The new technologies have accorded to the consumer an active role in the definition of the brand going beyond the advertiser's strategic objectives and considerations. This fact creates huge uncertainty in the discourse of advertising executives, who only understand research based on the consumer's behaviour, his media habits and lifestyles, which allow the risk in managing the brand to be reduced and thus counteract audience fragmentation and achieve an appropriate degree of personalisation.

This uncertainty on the part of the advertiser affects other spheres of the communication management such as:

- The lack of adaptation of standardised systems for measuring the effectiveness of campaigns and of the ROI generated by the new relationships of the brand with the consumer in new media and technologies.

- Advertisers doubt the capacity of agencies to develop global strategies. They call into question their positioning as "integrated specialisation".

- Conversely, advertisers place greater trust in media agencies since these offer them short and medium term results and the capacity to generate integrated strategies.

In other words, based on these relationships and as stated explicitly in various interviews, the advertisers at present place more importance on the integrated media strategy than on creativity as such. It has become essential "to reach" consumers –media– over and above even the message and the values conveyed. This concern reflects the situation of profound transformation in the advertising market due to the changes in the consumer and the media. Media planning has become so complex that the strategic key lies in the support/format and not so much in the message.

This exposition clearly shows the distance between the corporate discourse (brands with ill-defined content as far as the customer is concerned) and the marketing discourse (strongly focused on the customer and the product/brand). Both versions proceed from distinct communication approaches and different departments of the company (marketing department vs. department of corporate communication, reputation, etc).

In this discourse, the corporate element is understood in two ways: as periodic campaigns of CSR, internal communication and media relations "*which are run by other departments*"; or from a commercial approach in which these types of campaigns are another means for successfully maximising the points of contact between the brand and the consumer.

2.2.2.3. Discourse of the corporate brand: the value of the brand
The third position is that of those advertisers interviewed who handle communication understood in a wider sense, whereby it is understood that everything the company does communicates and these actions are aimed at the consumer but also at other publics with whom it has a relationship (stakeholders). Thus, as well as commercial messages, the management of extremely diverse aspects is considered relevant (customer service, products, control of the brand, internal communication, etc.) to confer upon the organisation a unique and uniform meaning among all its publics:

"We have always tried to make communication campaigns coherent in terms of sending messages to all the various groups"

"Communication is everything and so communication is also the way we behave with people, the way we are …"

The construction of the brand takes place as a process from within the company (Hatch and Schultz, 2008, pp. 12 et seq.). The brand is assigned a series of values of identity which are projected among its various audiences via all the messages and campaigns so that in the way a unified and coherent image of the company is built up and one associated with key concepts in the public domain. The research therefore concentrates on obtaining information about how well adapted the brand's values are to the stakeholderswhom the company is relating to and the extent to which they belong and are accepted by them.

This discourse is extremely determined by the industry to which the company belongs. Companies belonging to industries such as energy, financial services or telecommunications implement this communication concept. Moreover, the handling of communication is carried out by other departments distinct from the usual marketing and advertising departments, in being associated with areas such as the central department of communication or external communication, which are independent and even sometimes play a more important role (as far as communication decisions are concerned) within the organisation. This sometimes entails conflicts between departments. Thus the way communication is run in the company corresponds to a fragmented structure whereby different departments or areas of operation within the company are simultaneously dealing with the same task albeit from different angles.

However, in some interviews a contradictory discourse clearly emerges between what communication management

ought to be over the long term –the creation of a solid corporate brand with a series of identifying values– and what are ultimately the commercial expectations in the short term, commercial campaigns which ensure the return on investment and sales (e.g. Lane Keller and Lehmann, 2006, p. 743). This situation stems from the fact that it is not always possible to practice this type of communication, but rather periodic campaigns to communicate the brand's values are realised.

2.2.2.4. Discourse of contradiction and uncertainty
This last discourse cuts across all the previous ones, given that each advertiser interviewed sees from his position a series of changes in the market of communication which affects the way he runs communication, his way of dealing with new practices and media and the position adopted in relation to the different agents in the industry. All the advertisers take the view that the new central role assumed by the consumer –more demanding, with a more fragmented consumption and greater choice of media at his disposal– and the explosion of new technologies, with new devices that allow interactivity and the construction of communication by users, are the pivotal points which are destabilising the market and often calling into question the ways of handling the communicative practice and to be assured of the effectiveness of their campaigns.

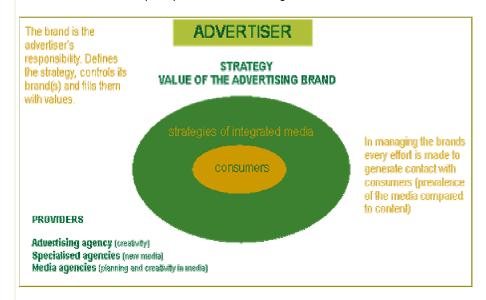The uncertainty produced by these changes in the market can be observed in various aspects such as:

- The relationship of the advertisers with communication companies

- The central role which the advertiser has taken on

- The separation between corporate communication and advertising communication

- In choosing the most effective media mix and the present measurement of effectiveness

- The extreme terminological conceptual confusion when referring to the new media

- The central role taken on by the media as regards content

- The contradictions between the brand strategies dictated at international level and the local needs of the brand

- The confusion between the concept and practices of responsibility and corporate action

3. Main conclusions and some recommendations
3.1. Conclusions
The advertisers perceive themselves in the present with clarity and with somewhat conventional communication models but do not see the immediate future with this same clarity; they even question those models (see Table 4).
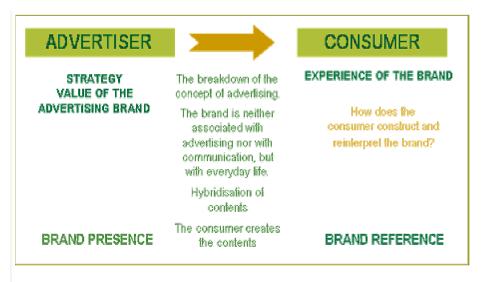
Table 4. The advertisers' perception of the advertising context

Source: the authors.

With this perception the Advertiser defines his position in the market with clarity which ends up being determined almost exclusively by the communicative strategy targeted at the consumer (see Table 5).

Table 5. Changes in the communication strategies

ADVERTISER → CONSUMER

STRATEGY
VALUE OF THE
ADVERTISING BRAND

The breakdown of the
concept of advertising.

The brand is neither
associated with
advertising nor with
communication, but
with everyday life.

Hybridisation of
contents

The consumer creates
the contents

BRAND PRESENCE

EXPERIENCE OF THE BRAND

How does the
consumer construct and
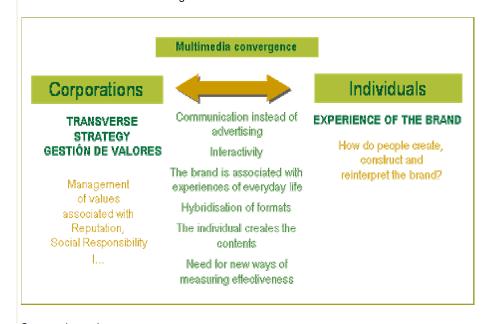reinterpret the brand?

BRAND REFERENCE

Source: the authors.

Nevertheless, the Advertiser observes certain changes which may change this situation and which presuppose the breakdown of the concept of advertising in its traditional sense; in effect the consumer is taking on a more active presence in relation to the brand, which can even go as far as a certain reinterpretation of the brand from the domains of consumption themselves. In the opinion of the advertisers this new factor may determine a certain polarisation in the values of a brand which is constructed from the advertiser (*brand presence*) and one's own consumption (*brand reference*).

From this double perspective, the advertiser recognises that he is located in an environment of great complexity in which his own strategy and room for manoeuvre ends up being directly determined by the contexts of consumption that may come into conflict with the values of identity of a company and force the latter to make permanent changes. It is for this reason that the Advertiser, who continues to defend first and foremost the value of his brand, understands that in the near future it will be the consumer who will determines the content of its brand and people's own everyday lives will become the space responsible for giving value to objects and forms of behaviour. This is a situation which, if it is true, will integrate the advertiser and the brand into a universe influenced by countless factors which the advertiser does not directly control and which may break the same *directionality* of communication and conventional model of advertising.

3.2. Recommendations
Given all that can be noted in the analysis of the interviews and the opinions adopted by the interviewees themselves, the future may presuppose further changes of greater significance which we believe would affect even the established models for advertising communication (see Table 6).

Table 6. The future of advertising communication

Multimedia convergence

Corporations ← → Individuals

TRANSVERSE
STRATEGY
GESTIÓN DE VALORES

Management
of values
associated with
Reputation,
Social Responsibility
I...

Communication instead of
advertising

Interactivity

The brand is associated with
experiences of everyday life

Hybridisation of formats

The individual creates the
contents

Need for new ways of
measuring effectiveness

EXPERIENCE OF THE BRAND

How do people create,
construct and
reinterpret the brand?

Source: the authors.

Firstly, we understand that the Advertiser is increasingly concerned about the values with which it is identified as a company; and, secondly, the consumer is becoming an individual in charge of consumption decisions, who takes it upon himself to determine *on the basis of his experience (experientially)* what the value of a brand is. This twofold element makes the advertiser become a company which manages values and transforms communication into a complex process of interaction and multimedia convergence.

For this reason, the advertiser sees itself increasingly obliged to manage the values of its brands (whether corporate or product-related), all of this diagonally; in other words, dealing with the different departments in the company and observing integrated communication throughout the totality of its actions. The consumer, transformed into an active individual who takes decisions, is the object of permanent research; among other things because even the content of the brands will begin to be generated in the spaces generated by the processes of interaction.

These two factors explain the change in those providing the communication of the Advertiser and, above all, the change in conventional ways of understanding advertising communication as such. The *interaction* essentially constructs social spaces where the brand is associated with the experiences of everyday life and where the change and *hybridisation* of the formats make advertising communication into a process which always questions its own return to the Advertiser.

This situation forces the Advertiser to redefine an entire set of new concerns which, going beyond the standard ones, begin to be observed in the communication market. In this sense, we understand that these issues are on the table and that the Advertiser needs to make sure that they avoid turning into internal contradictions as regards communicative actions that occur day-to-day.

In the first instance, the Advertiser is above all a company whose economic objectives are increasingly less far-removed from the models of communication that support its actions and whose performance achieves special relevance from the social acceptance of its own image.

These models of communication converge on two main questions: the interactivity of communication takes precedence over the directionality and the notoriety of the brand recedes in importance as compared to the *reputational and corporate values of identity and brand*, which increasingly depend on individuals themselves.

These factors lead to new concerns affecting the nature of the formats and the relationship, already classic, between the investment and the real effectiveness of the communication established.

In the future the advertiser ought to address certain questions related to the company's departmental structure as well as its ways of understanding advertising, the constructions of the messages in conventional and non-conventional media and its ways of understanding and interacting with its different publics. Some of these aspects are listed below:

* Improve relationships between the company's department of communication and the advertising and marketing departments

* The Advertiser's advertising is not something isolated and exclusively aimed at the commercial brand

* In the majority of cases there is no direct relationship between communication and sales

* It is increasingly necessary to redefine the role and forms of communication used by the Advertiser in conventional and non-conventional media

* It is important to establish in the company's handling of communication the relationships that are established between the values of reputation and identity and the control of the brand

* It is absolutely necessary to integrate into the advertiser's communication the experiences of the brands generated in the publics

* The various publics are extremely knowledgeable of the resources of the media and demand less *intrusive* and more specialised and personalised messages

4. Bibliographical references

Aaker, D. (2008): *Spanning silos: the new CMO imperative*, Harvard Business School.

Abril, G. (1998): "La revolución digital: Individuo y colectividad en el ciberespacio", in *Revista de Occidente*, 206, pp. 59-76.

Alameda García, D. (2006): *Una nueva realidad publicitaria. La generación de valores corporativos en publicidad*, Ediciones Laberinto, Madrid.

Alzugaray, P. (2005): "El sector publicitario hoy. Especialización integrada", in *Telos, 64*, 62-65, July-September, Madrid.

Benavides Delgado, J. (2000): "La publicidad y la comunicación en el 2000. Unas breves reflexiones sobre la historia y el inmediato futuro", in A. Laguna (ed.), *La comunicación en los noventa. El mercado valenciano,* Universidad Cardenal Herrera CEU, Valencia*,* pp. 189-204.

---- and Alameda García, D. (2006): "Hacia dónde va la publicidad? En *Comunicación y pluralismo,* no. 0, Universidad Pontificia de Salamanca, pp. 35-60.

---- and Villagra, N. (2009): "Valor de la marca y sus formatos en televisión: ¿utilidad o ineficacia?", in *Actas del I Congreso Internacional Brand Trends*, Universidad CEU Cardenal Herrera, Valencia.

Boschma, J. (2008): *Generación Einstein. Más listo, más rápidos y más sociables. Comunicar con los jóvenes del siglo XXI,* Gestión 2000, Barcelona.

Bravo Navalpotro, J. (2005): "Ante un escenario cambiante, repensemos la publicidad", in *Telos, 64,* 87-92, July-September, Madrid.

Carcelén, S., Rodríguez, C. and Villagra, N. (eds.) (2006): *Propuestas para una comunicación de calidad. Contenidos, efectos y formación*, Edipo, Madrid.

Costa, J. (1993): *Reinventar la publicidad. Reflexiones desde las ciencias sociales,* Fundesco, Madrid.
Dahlen, M., Lange, F. and Smith, T. (2009): *Marketing communications: a brand narrative approach,* John Wiley, London.

Fombrum, C. J. (1996): *Reputation, Realizing Value from the Corporate Image,* Harvard Business School Press, Boston.

Fernández Blanco, E. (2007): *¿Publicidad o información? La presencia de la publicidad en los informativos de televisión,* Eduforma, Sevilla.

Fernández Blanco, E., Alameda García, D. and Martín Martín, I. (2009): "Los nuevos vectores de la publicidad: publicidad como contenido (branded content), publicidad como relación emocional y publicidad social colaborativa" in *Trípodos,* supplementary no. 2009, vol. 2, pp. 707-718.

Gil, V. and Romero, F. (2008): *Crossumer. Claves para entender al consumidor español de nueva generación*, Gestión 2000, Barcelona.

Gordillo, I. (2004): "Reciclaje e hibridación en los nuevos formatos televisivos", in Mínguez, N. and Villagra, N. (eds.), *La comunicación: nuevos discursos y perspectivas*, Edipo, Madrid.

Hatch, M.J., and Schultz, M. (2008): *Taking brand initiative. How companies can align strategy, culture and identity through corporate branding*, Jossey – Bass, San Francisco.

INFOADEX (2007): *Estudio INFOADEX de la inversión publicitaria en España 2007*.

Lane Keller, K. and Lehmann, D.R., (2006): *Brands and Branding: Research Findings and Future Priorities* in "Marketing Science", vol. 25, no. 6, pp. 740-759.

Losada Díaz, J. C. (ed.) (2004): *Gestión de la comunicación en las organizaciones*, Ariel Comunicación, Barcelona.

Martí, J. y Muñoz, P. (2006): "Tendencias: El futuro ya está aquí ¿no lo ves?", in *Control*, July-August, pp. 28-31.

Mattelart, A. (1991): *La publicidad*, Paidós, Barcelona.

McStay, A. (2009): *Digital Advertising,* Palgrave Macmillan, New York.

Medina, A. (2004): *Apuntes para un cambio de siglo publicitario,* Cinca, Madrid.

Patton, M. Q. (1990): *Qualitative Evaluation and Research Methods*, Sage, London.

Riesgo Alcaide, A. (2005): "La economía de la publicidad. Generación de valor de la actividad publicitaria a la economía", in *Telos*, July-September, Madrid, *64*, pp. 45-51.

Rovira, J. (2008): *Consumering*, ESIC, Madrid.

Salmon, C. (2008). *Storytelling. La máquina de fabricar historias y formatear mentes.* Península, Barcelona.

Scott, D.M. (2009): *The new rules of marketing and PR: how to use social media, blogs, news releases, online video and viral marketing to reach buyers directly,* John Wiley & Sons, London.

Vallés, M. S. (1997): *Técnicas cualitativas de investigación social. Reflexión metodológica y práctica profesional*, Síntesis, Madrid.

Van Dijk, T. A. (1997): "El estudio del discurso", in Van Dijk, T. A., *El discurso como estructura y proceso (vol. 2)*, Gedisa, Barcelona, pp. 21-65.

Various authors (1995): *Métodos de investigación en Psicología*, Síntesis, Madrid.

Victoria Mas, J. S. (ed.) (2005): *Reestructuras del sistema publicitario*, Ariel Comunicación, Barcelona.

5. Notes

[1] On this, see Elena Fernández Blanco, *¿Publicidad o información? La presencia de la publicidad en los informativos de televisión.* Eduforma: Seville, 2007.

[2] The most significant results of this research were previously reported in a short paper entitled "La gestión publicitaria y de comunicación en el anunciante", published by the AEA and presented at its General Meeting.

[3] A clear example of this is the development of promotional games on the internet, the development of virtual communities and the use of YouTube for commercial ends, whereby users themselves devise messages for commercial brands or contribute to their dissemination.

[4] Thus the notion of "consumering" is beginning to be used (Rovira, 2009).

[5] In its initial phase this work was carried out by the same research team made up of David Alameda, Juan Benavides, Elena Fernández and Nuria Villagra along with the collaboration of Ángel Parada.

* This article is the result of a research project co-authored with the Spanish Association of Advertisers under the auspices of a collaboration framework agreement between the latter and the Complutense University of Madrid. It was led by Juan Benavides Delgado and, in accordance with the said project, the research was carried out by four researchers who dealt with the fieldwork, analysis, conclusions and final report, respectively. This article discusses fundamental aspects, not previously published, based on this research, the main conclusions obtained as well as various other questions that impinge directly upon the advertiser's communication practice and which continue to be the subject of inquiry by the authors.