Prospective analysis of the advertising sector: reality and trends

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Abstract

The advertising sector is immersed in a period of change in various ways, from a structural level to the type of insertions to be made in the media. Methodologically, the qualitative Delphi technique is applied herein, being the most recommended prospective approach for such emerging research topics. It is concluded that the key factors that define the advertising sector are digital transformation and the business model, to include three years from now, personalization, automation, and programming. Social networks are rising to become the communication channel that most uses advertising, and strategy stands out among the knowledge, skills, and competences that the advertising professional must obtain in the future.

Keywords

Strategic communication; Organizational communication; Advertising; Digitalization; Channel; Knowledge; Trends.

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1. Theoretical framework

Advertising is evolving in both its content and form, resulting in the differentiation between traditional and new advertising media. Despite this distinction, the main objective of advertising remains the same: to publicize a product or service and make the consumer want it (**Caro**, 1994). Transience is increasing in new media, with a constant stream of ads on many platforms, where each brand struggles to unseat its competitors.

Television, radio, and paper platforms are the conventional channels ("above the line") used to publicize a product. The content, frequency, and time are agreed upon by companies without the intervention of consumers in this process (**Geirinhas**, 2014). However, these media have reached a certain saturation, with an average of 92 advertising impacts per adult throughout the day, resulting in reduced effectiveness towards the potential consumer (**López-de-Aguileta-Clemente**; **Torres-Romay**, 2007). Viral marketing arose thanks to the Internet and social networks, where consumers themselves direct the campaign and explain the product or service (**Vilpponen** *et al.*, 2006).

In a broadband society (**Fondevila-Gascón**, 2013), technology increases the chance of engagement with consumers (**Mir** *et al.* 2015). For this reason, social networks are becoming the main asset for companies to reach the maximum number of people while incurring the minimum cost. The consumer delivers the message to potential customers, a state of affairs that offers both confidence and veracity (**Brown** *et al.*, 2007).

The digital transformation is extending to advertising. In fact, the comparison between the competencies and professional profiles in advertising and public relations reveals the innovative requirements to be implemented in the advertising field (**Fondevila-Gascón**; **Santana-López**; **Rom-Rodríguez**, 2017). Consumers themselves make a product known through social networks such as *Instagram*, *Twitter*, *YouTube*, and *Facebook*, where brands work to control and improve their e-reputation by creating an association with a public figure. Brands contact such brand advocates, influencers, or brand ambassadors to sponsor a product or service. This business strategy can achieve the maximum visibility with a minimum investment (**Castelló-Martínez**; **Del-Pino-Romero**, 2015).

By means of such "collaborations," social media personalities manage to make this new advertising format their main source of income. Their followers become stakeholders in each of the products or services they use, from a face cream to running shoes, or even a service such as *Waynabox*, which consists of traveling for €150 to a place that is revealed two days before the departure date. Their public profiles act as a platform for hundreds of non-traditional ads, but with greater effect than conventional advertising due to the relationship created between followers and influencers (**Geirinhas**, 2014).

The fastest and most efficient way to make a company go viral is by the prior selection of and subsequent collaboration with a group of influencers (**Dye**, 2000), as is the case of the company Abercrombie & Fitch, which recruits young and popular students who are normally affiliated to well-known college fraternities.

It is important to highlight the digital role of women, which, according to **Phelps** (2004), is more profitable. This is due to the continuous suggestion of advertising on *Instagram* or *YouTube* profiles, where the prior female predisposition to shopping becomes an opportunity for companies (**Phelps**, 2004).

The phenomenon analyzed starts with blogs (**Findlay**, 2015), which emerged before networks such as *Instagram* and can thus be considered as a first form of social media (**Maurya**, 2011). Users trust the opinion of these bloggers if they want to buy a product (**Kerr**, 2012). Bloggers are often present on various networks (*Instagram*, *Facebook*, *Twitter* or *YouTube*). Paula Echevarría or Dulceida (Aida Domenech), both with a million and a half followers on *Instagram* in 2017, became personalities, and brands are eager to collaborate with them to increase their visibility.

1.1. Legal framework

The exercise of marketing and its possible manifestations are regulated by *Law 7/2010 on Audiovisual Communication Services* (*BOE*, 31 March 2010). It entered into force effective 1 May 2010, and its objective is to regulate audiovisual communication with state coverage, without prejudice to the rights reserved for autonomous communities or local entities (Article 1, *Law 7/2010*).

If we look at Article 2.2., different types of audiovisual communication are distinguished:

- television (broadcasting of audiovisual content on television with a set time and schedule),
- television on demand (where the viewer can select the audiovisual content to consume on television based on a catalog, set time, and available schedules),
- mobile television (where content can be consumed on a mobile device),
- radio (consumption of audio content within a set time and schedule),
- radio on demand (consumption of audio content that the listener can choose to consume within a catalog, set time, and available schedule), and
- mobile radio (audio content that can be consumed on a mobile device).

Some definitions related to elements or key phrases of this research should be presented:

Audiovisual programs
Are understood as television programs (sequences of images) or radio;

Channel
Is understood as a set of television or radio programs manifested within a programming schedule and that cannot be altered by consumers;

Independent producer
Is a person who assumes the initiative, coordination, and economic risk of the creation of their own audiovisual content (independently or commissioned by brands, without the need to be linked to them on a permanent basis);

Sponsorship
Describes the situation where any public or private entity or person offers financing for audiovisual communication services to promote its brand, company, image, activities, or products; and

Product placement
Is any form of audiovisual communication where a brand, product, or service is included or inserted within a program.

Independent producer and sponsorship are concepts that could form the legal figure of the influencer within the new communication channels in Spain, such as *YouTube*, *Instagram*, Twitch, or *Twitter*, among others. However, as we can see, *Law 7/2010* understands audiovisual communication as the set of television or radio programs. This creates a legal vacuum regarding the legal figure of the influencer, who does not use television or radio media.

Article 6.5. establishes the right for commercial communication to be differentiated from other audiovisual content, according to current regulations. If we examine the rights of audiovisual communication service providers, and specifically the freedom mentioned in Section 1 of Chapter II, it can be noted that Articles 10, 11, and 12 regularly mention the concept of channel.

If *Law 7/2010* understands a channel as a set of television and radio programs, the new channels that reside on social networks, or in other words, influencers, are excluded from the range of advertising media covered by this law. Consequently, the legal sphere of this audiovisual communication channel remains in limbo.

Currently, the consumption of traditional media is decreasing, while the number of users of new communication platforms is constantly increasing (**Martín-Ibáñez**, 2010).

Understanding influencers as a minority of individuals who influence a large number of relevant people for the creation of public opinion (**Watts**; **Dodds**, 2007), brands target them to act on digital platforms and achieve reliable metrics (**Fondevila-Gascón** *et al.*, 2016). Classical works such as those of **Merton** (1957) and **Weimann** (1994) began to develop the concept of the person who influences the behavior of others, although it was **Keller** and **Berry** who popularized the concept of influencer in 2003. The difference between an influencer and a brand ambassador (**Sussman**, 2015) is that the latter is hired long-term by the brand, while the influencer's relationship is short-term and informal. The influencer makes this condition profitable by dint of their followers: Cristiano Ronaldo had 88.2 million followers on *Instagram* at the beginning of 2017. *TAG Heuer* sent him a watch, and the player uploaded a photo onto *Instagram* with the hashtag of the company's advertising campaign (*The Data Team*, 2016). This was a way to reach almost two and a half million people (number of "likes"), plus those who did not interact with the photo but saw it on their main board.

It is important not to confuse audience with influence (**Baer**, 2016), since even if a celebrity has a high number of followers and visibility, this does not automatically translate into influence (**Montaña-Blasco**, 2016). According to **Baer** (2016), public trust varies as follows: 18% in influencers, 92% in brand ambassadors. *Instagram* has a profile of young users and trendsetters –with a higher percentage of female users– that enable another type of advertising with the aim of achieving increased recommendation and brand loyalty (**Matos-Elices**, 2016).

> The objective of Delphi was to determine the three key factors that define the state of the art of the advertising sector in 2019

The extensive platform of *YouTube* includes what one could call the *beauty vlog* section. Young influencers record this type of video (**Fischer**, 2014), and the content of their channels can be summarized in videos such as "dress up with me" (routines of how they dress up to go out), "hauls" (videos of purchases/products sent), "makeup," "looks" (combinations of clothes for different occasions), and "reviews" (opinion videos on different products), among others. Hauls are videos lasting approximately 10 minutes (although in some cases they can extend to 30 minutes), where influencers talk about their most recent makeup and clothing purchases (**Jeffries**, 2011).

These well-known and sought-after hauls can sometimes hide so-called brand collaborations (**Müller**, 2015). **Müller** (2015) explains that it has become fashionable for low-cost online fashion brands (such as *SheIn*, *Romwe*, or *Choies*) to contact these youtubers, offering them an amount of money so that they can choose clothes from their website and in return commit to making a promotional video for the brand. The problem with these collaborations is that the product that reaches the consumer is often different in color, texture, and size from that bought online (**Marín-Camp**, 2016).

> Changes in the business model, in digital transformation, in the fragmentation of audiences, importance of analytics and profitability and quality of creativity are the items mentioned

Instagram, with millions of photos shared daily (**Wally**; **Koshy**, 2014), is another medium suitable for marketing, with 50% of brands using it as an advertising medium (**Miles**, 2013). A common use of *Instagram* by accessories and fashion companies is to post under the hashtag #OOTD (outfit of the day), showing the combinations worn (**Gurrieri**; **Cherrier**, 2013).

Collaborations on *Instagram* normally follow a pattern. First, influencers receive the products as a gift and then show them on their profiles. As they become more popular characters, they begin to receive income from showing those products. Unboxing consists of unpacking live the products received from the brands for their followers to see. One strategy that brands choose (in the case of Daniel Wellington) is to offer a promotional code to the influencer (**Celada**, 2016).

The ranking of income from audiovisual and interactive entertainment consumption is led by the videogame sector (**Tapia-Frade**; **López-Iglesias**; **González-Posada-Vaticón**, 2009). Organizations are redirecting their advertising resources towards alternative media such as product placement, event marketing, or mobile marketing (**Martí-Parreño**; **Currás-Pérez**; **Sánchez-García**, 2012). There are also modalities to advertise a brand in video games, such as the integration of advertising with video games to create "advergames" that advertise a brand in an associative, illustrative, and demonstrative way, or in-game advertising (integrated into an entertainment video game).

2. Methodology

The objective of this research is to identify the cornerstones of motivation and prospective trends in the field of communication and interactive advertising. To this end, a qualitative technique is chosen: Delphi, which probes specialists in a subject area on a study topic of certain complexity, with analytical depth and in a propositional way, to reach a consensus on the kaleidoscope of opinions collected (**Landeta**, 1999; **Hsu**; **Sandford**, 2007), although such agreement is not the ultimate goal (**Dalkey**; **Helmer**, 1963).

The group of experts was chosen after focusing the analysis on the new forms of interactive advertising on television, Internet, and digital media and real applications in HbbTV. A first questionnaire was prepared for a first round of interviews, the questionnaire was tested among professionals and academics, the contact material was prepared, the questionnaire was sent online, and the fieldwork was monitored. The research took place between April and July 2019.

The profile of participants in the panel was professional and academic. The selection criteria were the accumulation of more than five years of experience, an established position (for example, leaders of advertising or media agencies, companies, or associations, positions related to the advertising or technology sector, and members of academic institutions), and knowledge about the discipline and professional reality. The professionals carry out tasks related to the object of study, while the academics complement this vision based on their scientific knowledge. The number of participants was 34, which is large considering the HbbTV specialization, breaking down into 26 Spanish specialists, 5 from other European countries, and 3 from the rest of the world. Among the Delphi participants, 6 were academics and 28 were professionals (Tables 1 and 2).

Table 1. Number of participants in the Delphi rounds

	Invitations	Acceptation	1st round	2nd round
Strategy	5	4	4	4
Research/Consulting	2	1	1	0
Media agency	6	5	5	4
Expert in digital TV	9	7	7	6
Technology park	2	2	2	2
Advertising agency	1	1	1	1
Scholars	6	5	5	4
Multinational advertiser	3	1	1	1
Total	34	26	26	22

Table 2. Profile of the sample (total *n* = 26)

Professional profile	Frequency	Education	Frequency
Academics	5	Professional diploma	3
Advertising professionals	12	Degree	12
Technology professionals	9	Master's	1
		Doctorate	10
Gender	**Frequency**	**Age (years)**	**Frequency**
Male	18	30-39	5
Female	8	40-49	11
		50-59	9
		60 or more	1
Current position	**Frequency**	**Type of organization**	**Frequency**
Professor	5	University	7
Management (president, CEO, board member, etc.)	9	Advertising/MK/Communication agency	7
Intermediate role (chief sales officer, chief commercial officer, director of communications, project manager, etc.)	12	Media agency	5
		Company	3
		Association	2
		Research institute	1
		Media	1

Years of experience in current company	Frequency	Total years of commercial experience	Frequency	Country	Frequency
1-4	8	5-9	1	Spain	18
5-9	6	10-14	4	France	1
10-14	2	15 or more	21	Belgium	1
15 or more	7			United Kingdom	1
				Germany	1
				USA	1
				Singapore	2
				Australia	1

The online questionnaire was tested with 12 people (6 advertising and information technology professionals and 6 academics) to analyze the current advertising model, interactivity and advertising effectiveness, television advertising, and technology and advertising, plus an open section. The second exploratory phase was implemented in two rounds (**Landeta**, 1999; **Okoli**; **Pawloski**, 2004).

Synthesis of the content analysis applied to the first questionnaire (**Berelson**, 1952; 1967) led to a second questionnaire, which was validated among 12 other people with profiles similar to the previous 12. The questionnaire was sent back to the panelists, with an explanation of the findings and a request that they rate their initial positions on the sample responses. Finally, a statistical analysis of the data was carried out.

3. Results

The goal of the Delphi process was to determine the three key factors that define the state of the art of the advertising industry in 2019, with a view to possible forward-looking trends.

The group of experts mentioned five items: changes in the business model, changes in digital transformation, changes in the fragmentation of audiences, the importance of analytics, and the profitability and quality of creativity.

The item mentioned with the greatest relevance (top two boxes) in the answers was digital transformation, with 63.6% acceptance.[1] This was followed by changes in the business model with 54.4%.

In the least important range (bottom two boxes), the quality of creativity stood out, with 54.5%. In an intermediate position, without being polarized towards any extreme, we find the items "importance of analytics and profitability" and again "the quality of creativity," both with 27%.

The phenomenon of advertising digitization is clearly established. Investment data favor the Internet option to the detriment of other alternatives, which is why the advertising sector provides leadership towards this digital change and thereby the corresponding business model, which is tightly linked to the parallel phenomenon. In the case of the absolute wall model, digital journalism, the premium or freemium modes are examples of adaption to the analog to digital model.

The evaluation of the changes in the business model by the group of experts (Table 3) revealed that 54.5% considered them to be important or very important, 4.5% as somewhat important, and 40.9% as unimportant or not at all important.

The changes in digital transformation were evaluated by 63.6% of the group of experts as important or very important, by 18.2% as somewhat important, and by 18.2% as not very important or not at all important (Table 4).

The changes in audience fragmentation were evaluated by 31.8% of the group of specialists as important or very important, by 27.3% as somewhat important, and by 40.9% as not very important or not at all important (Table 5).

In fact, the phenomenon of audience fragmentation has been going on for years, affecting analogue television at its time as well as other analogue media. This is why 31.8% of the participants in the Delphi process did not give too much prominence to this criterion.

Table 3. Assessment of changes in the business model of the advertising sector

Responses	Percentage
Value 4 and 5	54.5%
Value 3	4.5%
Value 2 and 1	41.0%

Table 4. Assessment of changes in the digital transformation of the advertising sector

Responses	Percentage
Value 4 and 5	63.6%
Value 3	18.2%
Value 2 and 1	18.2%

Table 5. Assessment of changes in the fragmentation of audiences in the advertising sector

Responses	Percentage
Value 4 and 5	31.8%
Value 3	27.3%
Value 2 and 1	40.9%

Table 6. Assessment of changes in the importance of analytics and profitability of the advertising sector

Responses	Percentage
Value 4 and 5	36.4%
Value 3	27.3%
Value 2 and 1	36.4%

Table 7. Assessment of changes in the quality of creativity in the advertising sector

Responses	Percentage
Value 4 and 5	18.2%
Value 3	27.7%
Value 2 and 1	54.5%

Regarding the changes in the importance of analytics and profitability (Table 6), 36.4% of the group of experts considered them to be important or very important, 27.2% as something important, and 36.4% as having minor or no importance at all. Therefore, there is a balance in these options.

One possible cause is that the search for profitability has been established for years in the advertising environment. As this pragmatic prioritization is so widely accepted, as materialized in recent times through metrics such as cost per acquisition (CPA) or return on digital investment (digital ROI), it is not a novelty for managers. On the other hand, the moderate evaluation given to analytics is more surprising, perhaps being affected by its inclusion within the same epigraph. In Industry 4.0, Big Data, artificial intelligence, and the Internet of Things come together to facilitate the analytics of customer relationship management (CRM). This is a trend that appears intermittently in reports and market research, which makes this perception peculiar.

Regarding the changes in the quality of creativity (Table 7), they were evaluated by 18.18% of the group of experts as important or very important, by 27.7% as somewhat important, and by 54.5% as of minor or no importance at all.

Another focus of the questions was the most relevant changes that will define advertising in the next three years. The items mentioned were the following: changes in personalization, changes in digitization, changes in measurement standardization, changes in content co-creation between producers and consumers, and changes in automation and programming.

> The item mentioned with greater relevance in the responses was the digital transformation, with a 63.6% acceptance

The item mentioned in the top two boxes of the responses was personalization changes, with 52%, followed by changes in automation and programming with 46.6%.

In the least important range (bottom two boxes hereinafter), the changes in measurement standardization stood out with 50%, and the changes in co-creation of content between producers and consumers with the same percentage.

The changes in personalization were evaluated by the group of experts as important by 52.4%, somewhat important by 33.4%, not very important by 9.5%, and not important at all by 4.7% (Table 8). The addressability of today's advertising messages explains the primacy of personalization as a relevant change. In the dynamic of *AdSense* and programmatic buying of search engine marketing (SEM), messages that are individualized and presented at the right time are the cornerstone of agency strategies.

The changes in digitization (Table 9) were evaluated by the group of experts as important by 42.8%, somewhat important by 28.6%, and unimportant by 28.6%. Personalization goes hand in hand with digitization, since without it the work of CRM would be impossible. This explains the weight given to this criterion.

The changes in the standardization of the measurement (Table 10) were evaluated by the group of experts as important by 0%, average by 27.3%, and of little or no importance at all by 72.7%. This assessment is curious, possibly being anchored in the atavistic conservatism of media agencies and, not so much, of advertisers. The GRP mindset still weighs heavily, based on these responses.

Changes in the co-creation of content between producers and consumers (Table 11) were also evaluated by the group of experts, with 13.6% considering them to be important, 18.2% as somewhat important, and 68.2% as having little or no important at all. Co-creative dynamics prevails in e-commerce and social networks, although its impact in advertising terms is not easy to make tangible. This would justify this pyrrhic assessment.

Regarding the changes in automation and programming (Table 12), 46.6% of the group of experts considered then to be important, 13.4% as somewhat important, and 40% as of little or no importance at all. A certain polarization was observed in the answers, plausibly depending on the job carried out by the interviewees.

In the Delphi process, the experts were asked about which communication channels will be most frequently used by advertising. The following items were mentioned: social networks, patronage and sponsorship, television, and multimedia platforms. The item mentioned in the top two boxes of the responses was changes in social networks, with 59%. No other response item stood out above 40%. In the least important range, television stood out with 50%, and patronage and sponsorship with 40.9%

Social networks, which were understood as the communication channels used most frequently by advertising (Table 13), were evaluated by the group of experts as important by 59%, somewhat important by 32%, and of little or no importance at all by 9%. The trend towards insertions into social networks such as *Instagram*, *Facebook*, *Twitter*, or *LinkedIn* is reflected in this answer.

Table 8. Assessment of changes in the personalization of the advertising sector in the next three years

Responses	Percentage
Value 4 and 5	52.4%
Value 3	33.4%
Value 2 and 1	14.2%

Table 9. Assessment of changes in digitalization of the advertising sector in the next three years

Responses	Percentage
Value 4 and 5	42.8%
Value 3	28.6%
Value 2 and 1	28.6%

Table 10. Assessment of changes in the standardization of the advertising sector measurement within a horizon of three years

Responses	Percentage
Value 4 and 5	0%
Value 3	27.3%
Value 2 and 1	72.7%

Table 11. Assessment of changes in the co-creation of content between producers and consumers within a horizon of three years.

Responses	Percentage
Value 4 and 5	13.6%
Value 3	18.2%
Value 2 and 1	68.2%

Table 12. Assessment of changes in the automation and programming within a horizon of three years

Responses	Percentage
Value 4 and 5	46.6%
Value 3	13.4%
Value 2 and 1	40.0%

Table 13. Assessment of social networks as communication channels that will use advertising the most in 3 years

Responses	Percentage
Value 4 and 5	59.0%
Value 3	32.0%
Value 2 and 1	9.0%

Table 14. Assessment of patronage and sponsorship as communication channels that will use advertising the most in 3 years

Responses	Percentage
Value 4 and 5	0%
Value 3	27.3%
Value 2 and 1	72.7%

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The communication channels that will use advertising the most were evaluated by the group of experts, with 0% considering it as important, 27.3% as somewhat important, and 72.7% as of little or no importance at all for patronage and sponsorship (Table 14). In fact, except for cases of very defined thematic sections or websites of large events, sponsorship is giving way to other types of advertising.

Television was evaluated by the group of experts as the communication channel that will use advertising the most, with 13.6% considering it as important, 18.2% as somewhat important, and 68.2% as of little or no importance at all (Table 15). In principle, this would imply a certain conditioning factor for HbbTV, although the type of source of television content or interactivity was not qualified.

The communication channels that will use advertising the most were evaluated by the group of experts, with 27.7% considering it as important, 22.3% as somewhat important, and 50% as of little and no importance at all, for multimedia platforms (Table 16).

When asked what knowledge, skills, and competences the advertising professional of the future should acquire, the group of experts mentioned the following four items: digital competence, data analysis, strategy, and creativity.

The most relevant item mentioned in the responses was strategy, with 72.72%. No other item exceeded 40%. The closest, with 36.6%, was creativity.

In the range of least importance, no item exceeded 40%, which is determined as the threshold to highlight the results of the analysis. It is noteworthy that the item closest to the mentioned percentage was also creativity with 31.8%, with the response therefore being polarized.

The knowledge, skills, and competences that the professional of the future must acquire (Table 17) were evaluated by the group of experts, with 45.3% considering it as important, 22.7% as somewhat important, and 32% as little or no importance at all, for digital competence.

According to the data analysis, the knowledge, skills, and competences that the professional of the future must acquire were evaluated by the group of experts, with 31.8% considering it as important, 31.8% as somewhat important, and 36.4% as of little or no importance at all, for data analysis. Therefore, relevance is given to an essential activity in the prevailing database and CRM environment (Table 18).

The knowledge, skills, and competences that the professional of the future must acquire were evaluated by the group of experts, with 72.7% considering it as important, 22.3% as somewhat important, and 5% as of little or no importance for strategy (Table 19).

Finally, the skills and competences that the professional of the future must acquire were evaluated by the group of experts, with 36.6% considering it as important, 9% as somewhat important, and 54.4% as of little or no importance at all, for creativity (Table 20).

Table 15. Assessment of television as a communication channel that will use advertising the most in 3 years

Responses	Percentage
Value 4 and 5	13.6%
Value 3	18.2%
Value 2 and 1	68.2%

Table 16. Assessment of multimedia supports as communication channels that will use advertising the most in 3 years

Responses	Percentage
Value 4 and 5	27.7%
Value 3	22.3%
Value 2 and 1	50.0%

Table 17. Assessment of digital competence understood as knowledge, abilities, and competences for advertising in 3 years

Responses	Percentage
Value 4 and 5	27.7%
Value 3	22.3%
Value 2 and 1	50.0%

Table 18. Assessment of data analysis as knowledge, skills, and competences for advertising in 3 years

Responses	Percentage
Value 4 and 5	31.8%
Value 3	31.8%
Value 2 and 1	36.4%

Table 19. Assessment of strategy as knowledge, skills, and competences for advertising in 3 years

Responses	Percentage
Value 4 and 5	72.7%
Value 3	22.3%
Value 2 and 1	5.0%

Table 20. Assessment of digital competence understood as knowledge, abilities, and competences for advertising in 3 years

Responses	Percentage
Value 4 and 5	27.7%
Value 3	22.3%
Value 2 and 1	50.0%

4. Conclusions

The results of this analysis reveal the accordance between the responses of the Delphi participants with different profiles (academics and professionals) and nationalities (Spanish and European). The current perspective and that for three years ahead also did not reveal relevant

> In the minor range, the quality of creativity stands out, with 54.5%

changes. However, it is worth noting some answers that differed depending on the question, such as the importance of creativity (minor at present but important as a competence for professionals of the future). There is also agreement regarding the relevance of the digital transformation of social networks and automation, programming, and personalization of impacts, through television, a medium that is not expected to be the current leader in terms of investment.

> The advertising sector tends puts its weight on the adaptation and segmentation of the messages

The tabulation of the responses highlights five items (changes in the business model, changes in the digital transformation, changes in the fragmentation of audiences, importance of analytics, and profitability and quality of the creativity) where the participants in this study give importance to factors such as digital transformation and changes in the business model. The little relevance given to factors such as creativity (in a sector such as advertising) is surprising, as is the assumption of the dispersion of audiences (suggesting that it is considered an already consolidated phenomenon).

Regarding the most relevant changes that will define advertising in the next three years, five aspects can be mentioned (changes in personalization, changes in digitization, changes in measurement standardization, changes in content co-creation between producers and consumers, and changes in automation and programming), of which the changes in personalization and changes in automation and programmatic stand out, whereas changes in measurement standardization and content co-creation between producers and consumers are considered to be not very relevant. These responses seem to indicate that the path towards which the advertising sector is tending places weight on the adequacy and segmentation of messages that must be adapted in terms of both their timing and content to the public, sending the right message at the right time, all thanks to the possibility of analysis and prediction of programming. In the same way, co-creation or standardization of measurement is not valued, with both factors being difficult to specify in scenarios such as e-commerce or social networks.

Precisely, social networks are the communication channel considered to use advertising the most, far above the others mentioned (patronage and sponsorship, television, and multimedia platforms) and especially television, the medium to which least importance is given, which contradicts what is indicated annually in the summary prepared by Infoadex, where it is allocated around 40% of the investment (followed, of course, by the Internet). This indicates that, even if its future is not good, its present is.

> The strategy is valued as the skill and competence that the advertising professional of the future

Finally, it should be noted that strategy is valued as the skill and competence that the advertising professional of the future must acquire, above others such as digital competence, data analysis, or creativity, the latter being mentioned in second place, which differs from the importance given to this factor at present, as mentioned in the first paragraph of the conclusions.

Note

1. The top two boxes (Ttb) responses are equal to the sum of responses that correspond to "very important" and "important," while the bottom two boxes (Btb) correspond to "not important" and "not very important." The consensus criterion implies a minimum of 40% for both variables.

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