COMMUNICATION & SOCIETY

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New discourses in brand communication in Spain: adaptation vs. renewal of target audience

Abstract

This paper delves into the existence of obvious changes in the way of understanding brand communication in Spain. To this end, we drew from an initial theoretical framework, based on a bibliographic review of the brand concept, from the point of view of communication, social trends and brand experience. Furthermore, we proposed a qualitative analysis method, in which groups of experts in communication participated, both in focus groups and in questionnaires, following the Delphi method. The results obtained were cross-referenced in order to analyze the coincidences and differences stemming from the use of both techniques. The main conclusion that may be drawn is the existence of two strands of opinion regarding brand communication, namely, a renewal-oriented vision and an adaptive vision: while the adaptive vision understands that agents, structures and processes are shaped to accommodate the digital world, the renewal-oriented vision states that brands and media have built a new playing field, thus defining new rules. Adaptive vision favors the observation of targeting capabilities to reach different profiles or groups, while the the renewal-oriented vision finds it preferable to speak of customization, and *ad hoc* content, as it assumes the existence of a new model that defines the new communicative reality.

Keywords
Brand communication, target audiences, new trends, Delphi, Focus Group.

1. Introduction

The landscape of brand communication from corporations and institutions has been certainly changing in the past few years due to the emergence of new media and their groundbreaking way to reach the user/consumer. In this sense, we believe that it is necessary to delve in the study of such landscape and the paradigm that it is creating, and that it's not yet completed.

The current situation of mass media, brands, companies and consumers is complex, multivariate and difficult to understand, and

consequently its analysis shouldn't be addressed from just one methodology or scientific perspective, but different methods should be mixed in order to achieve possible valid conclusions. However, almost all of the investigations of greater academic or proffesional impact about features related to brands have used cualitative primary sources as tools to delve in attitudes, perceptions and opinions of the individuals. Their use is justified because they allow to study the brand actuality, media and consumers in their natural context, empirically and within a totalizing and integrating approach. That is why we have chosen cualitative techniques in the present study, as we will explain later.

The paper is structured as follows. Firstly, we review the existing literature related to the subject of this study, focusing on brand communication, new communication discourses, brand exprerience, brand value and awareness, confidence and loyalty to the brand. Secondly, we explain the methodology followed in the present study (Delphi and Focus Group). Thirdly, we analyse the results obtained, and finish the paper discussing the results.

This paper is part of a research project funded by the Spanish Ministry of Economy and Competitiveness, that shows on the one hand the urgent need of markets and organizations to define and reestablish their position in the media stage, and on the other hand the changes occurring in the social context through the definition of the new paradigm that is being consolidated in the market of media and their effect in the management of the communication and interaction of corporations and organisations, with particular attention to the creation and management of contents that influence how and what stakeholders expect about brand discourse.

2. Theoretical background

The concept of brand communication refers to all those communications that affect the perception and assessment of significant aspects of brands. In recent years, companies have changed their communication relationship with brands: "new approaches indicate that organizations should be concerned about creating value for the consumer, since this value will be associated with generating loyalty behaviors and, as result, positive effects on corporate profits" (Rodríguez, Camero & Gutiérrez, 2002).

Ultimately, companies look not only for a differentiated proposal, but also social acceptance and legitimation as social institutions. The aim is to stablish a connection with audiences through values and relationships that lead to recommendation, support and, from a commercial perspective, purchase intent (Villagra, López & Monfort, 2015).

Thus, new communication discourses arise with the aim of reaching new consumers. A consumer who is hard to control and is in constant change, as Gabriel and Lang, (2008) point out: from a stable consumer to an unstable one. Cova and Cova (2014) go even further and speak of three types of consumers: passive, active and creative.

Brand communication has become one of the main priorities for companies, as it allows them to deliver new discourses to these new consumers. (Sebastián, Ayestarán & Rangel, 2012).

The omnipresence of brands in the daily life of consumers is clear, and it has been studied in terms of the awareness towards brands (Kapferer & Laurent, 1992), of trust (Chaudhuri & Holbrook, 2001), and loyalty (Jacoby & Chesnut, 1978), which is associated to higher levels of client satisfaction (Lambin, 2004). In turn, satisfaction is associated to elements of the same level of performance, quality, price, appreciation and image (Aaker, 1996). Therefore, brand loyalty is considered one of the basic parts of brand value (Aaker, 1996; Keller, 1993), and it is positively related to consumer satisfaction expressed in highly favorable attitudinal and behavioral levels to the brand (Colmenares & Saavedra, 2007).

In addition, consumers may develop feelings of love towards brands; authors such as Albert, Merunka and Valette-Florence (2008), explain that there may be a feeling of love, when the beloved object is a possession or a brand, based on the relational paradigm where consumers may assign human characteristics to brands (Aaker, 1997; Fournier, 1998).

Many companies offer brand experience to the consumer, as it is a key factor in the development of brand loyalty. However, in spite of the importance attached by customers to the brand, this is a subject that has not yet been analysed in detail. In this respect, recent studies regarding brand communication in non commercial corporate activities in Spain found that such brands are monitored closely by their target groups, taking into account that companies are motivated by criteria relating to social discourse (ethic values, social impact, environmental concerns, etc.). Companies like Mercadona, Iberdrola, Telefonica, Inditex, BBVA, Santander, Acciona or Repsol show a development of similar discourses to express their identity, but just some of them choose to define their ethical concerns (Villagra & López, 2013).

Nowadays, most companies offer brand experience to their customers, a key factor in the development of brand loyalty. However, in spite of the importance attached by customers to the brand, this is an overlooked subject. Researchers like Berry, Carbone and Haeckel (2002), Meyer and Schwager (2007) or Shaw and Ivens (2005), tend to focus on actions and management results rather than on consequences and customer experience.

Customer experience generates a set of interactions between clients and products, and the reaction this triggers. This experience is strictly personal and involves the participation of customers at different levels: rational, emotional, sensory, physical and spiritual (Gentile, Spiller, & Noci 2007).

Other authors consider that customer experience encompasses the entire experience, including the search, purchase, and consumption phases and, after purchasing the product, the client's experience with the product itself (Verhoef *et to the*, 2009).

Brand value is proposed as a starting point for creating a set of measures that could be applied in all markets and products. This value is structured in four dimensions of brand equity: loyalty, perceived quality, association and awareness (Aaker, 1996). Therefore, these measures must reflect the value of the brand assets and focus on its sustainable advantage.

This brand experience happen in many cases on social networks where consumers talk to each other about companies, products and brands, sharing experiences about a particular brand with the community and giving advice, praising or criticising a brand, or considering other people's opinions (Castelló, Pino & Ramos, 2014).

Customer perception of brand value comes from many sources and it's based mainly on rational and emotional ideas usually acquired through advertising, which may affect the perception of the quality of a brand and influence the experience of it. In fact, a longer-established brand should have had more time to develop brand value, and thus should have an advantage over newer brands. However, this is not always true, as the brand with greater equity generates significantly greater preferences and intentions of purchase (Cobb-Walgren, Ruble & Donthu, 1995).

Marketing is a tool related to brand value. Authors such as Yoo, Donthu and Lee (2000) argue that marketing elements are related to the dimensions of brand equity, in other words, perceived quality, loyalty, association and awareness may generate and manage brand value. True loyalty is positively related to consumer satisfaction expressed in highly favorable attitudinal and behavioral levels towards brand (Colmenares & Saavedra, 2007).

Thus, marketing becomes a tool for brands, as Levy (1974) points out when he says that a brand achieves a desirable reputation through the creation of an ideal blend of products, attributes, tools, an intelligent use of resources and aesthetics.

In this sense, some brands have grown particularly sensitive to the need of socio-psychological and aesthetic improvement: they are more aware than ever of the need to

build relationships with customers based on their product. This is why Steve Jobs, back in 2011, highlighted the role of technology and aesthetics as key to the creation of the most successful brand in the world (Levy & Luedicke, 2013). In this regard, Fournir (1998) stresses the importance of brand loyalty and fidelity for achieving the link-relationship of brands with consumers (insight), while other authors, such as Osselaer and Dawn (2000) show, through their research, how brand value is attached to the learning processes of consumers, who can block or facilitate such learning through product attributes. Other authors speak of the relationship between brands and well-being, and of reputation as an agent of change (Bandinelli & Arvidsson, 2013).

As for brand value measurement, it is a complicated issue for which some researchers emphasise three different viewpoints for brand value study: the client's view, the competence's view and the financial foundation's view (Lane & Lehmann, 2006).

Some researchers pursue a method for brand experience measurement, because even though there are Brand personality scales (Aaker, 1997) and product aesthetics scales (Bloch, Brunel & Arnold, 2003), there is no reliable method for this purpose. Zarantonello, Schmidt and Brakus (2007) propose that brand experience may take five different forms: sensory, affective, social, physical or intelectual. They also develop a scale to measure each of these components of brand experience to demostrate how to distinguish between different brands, explaining that consumer experience related to a brand arises when they are exposed to brands and pay attention to their experiential features: typography, colors, emoticons, word games, etc.

There are authors who show that self-brand connections exist and may lead to favorable attitudes toward a brand. Consumers vary their commitment to brands, in general, depending on variables such as awareness, preference and loyalty, and tend to include individual brands as part of their concept about themselves. This is what researchers have called brand engagement in self-concept (BESC) (Sprott, Czellar & Spangenberg, 2009). On the other hand, authors such as Haley and Case (1979), performed attitude scales to measure discrimination towards brands by consumers.

Other researchers propose the connection and integration of positive value escales built upon five points (efficiency, quality, aesthetic, entertainment and social value) and three negative escales which represent three types of cost (monetary cost, perceived risk and time-effort) usually considered in literature regarding this area (Gallarza & Gil, 2006).

What seems to be more relevant is that brand measurement studies highlight the need –of the brand– to find what consumers think, their attitude, their preferences, their knowledge of the brand, etc. Thus, it seems necessary to perform brand measurements to find a competitive advantage that makes them different from the rest and, consequently, unique and special for consumers.

Once we have presented the studies referred to the subject, our work intends to make a small contribution to all of them, which consists on identifying lines of communication currently used by brands to reach their target audiences in Spain, and secondly, at analyzing the discourses of professionals in the field of communication in relation to the new languages used, contents, platforms, trends and effectiveness in brand measurement.

3. Methodology

In order to meet these objectives, a review of the existing literature was carried out. Subsequently, two different qualitative techniques were used, namely the Delphi method and focus groups. These qualitative techniques have been chosen as they are considered to be the most suitable ones for the collection of data such as descriptions, observations, and discussions about open questions (Hernández *et al.*, 2010), and also because they fit adequately the subject of the proposed study.

The Delphi study comprised the selection of a group of experts on the basis of four different but complementary areas: academics and research experts, experts from the corporate world, experts from the marketing and advertising world, and experts from agencies and media planning. Their opinion about the main lines of work and innovation currently arising in brand management and the communication processes associated with them was anonymously collected.

This method was chosen in view of its suitability for the subject of this study, according to Luna *et al.* (2006), as this technique is deemed appropriate for forecast studies based on the opinions of experts on a specific topic (2006). As Cabero and Infante (2014) explain, the suitable types of studies for this method meet some of the following features: not having sufficient information, time constraints for participants, a certain heterogeneity among them in terms of area of expertise and geographic location, and/or the need for anonymity.

This technique was also chosen because it meets three important requirements for this research (Taylor & Meinhardt, 1985; Rowe & Wright, 1999):

1. Anonymity: experts do not know the identity of the other components of the panel.
2. Controlled feedback and iteration: iteration is achieved by submitting the same questionnaire several times.
3. Statistical group response: the information presented shows all the opinions of experts, indicating the degree of agreement obtained.

In short, two questionnaires were carried out in two distinct waves. The first one took place between March 27 and April 15, 2015. This was the time frame provided to the experts to answer the questions of the first survey. The panels consisted of six or seven experts in the area.

The questionnaire sent to the experts revolved around issues on trademark management. The basic script of the research is found below.

Table 1. Overview of the structure and contents of the first and second wave of the Delphi method applied.

First wave contents	Second wave contents
Commercial management of brands and relationship with communication and consumers	
Communication trends in the brand-commercial-consumer relationship. Effects of advertising on commercial brands. Content and format in commercial brand communication. Influence of consumers on the management and creation of messages.	Platforms and specific topics for discussion with target audiences. Criteria for detecting opinion leaders. Strategies for recommendation or prescription.

Source: Own elaboration.

Once the time frame for replying to the questionnaire came to an end, the answers and number of people who had responded to the first wave of the study were analyzed. Certain drawbacks in the design were related to the detection of problems to answer some questions and, on the other hand, some issues were too broad. This allowed improving the second questionnaire, which was sent to 26 experts. Finally, the percentage of responses provided to the first wave in each one of the subjects was high (65% participation rate), except in the panel of experts from the corporate world, as seen below:

Table 2. Panels from the first Delphi wave.

PANEL 1: Academia and experts in research (5 experts)
PANEL 2: Experts from the corporate world (2 experts)
PANEL 3: Experts from the world of marketing and advertising (5 experts)
PANEL 4: Media agencies and experts on media planning (5 experts)

Source: Own elaboration.

The second wave of the study was conducted from May 5 to May 13, 2015. Due to the low turnout obtained, the final date for responding to the questionnaire was extended until May 21. The second questionnaire sent to the experts was carried out accordingly to the responses obtained during the first wave and its analysis. This second questionnaire took into consideration the nuances and particularities of the first wave (see Table 3).

The experts who replied to this second questionnaire in each of the panels were the following:

Table 3. Panels from the second Delphi wave.

PANEL 1: Academia and experts in research (5 experts)
PANEL 2: Experts from the corporate world (1 expert)
PANEL 3: Experts from the world of marketing and advertising (3 experts)
PANEL 4: Media agencies and experts on media planning (4 experts)

Source: Own elaboration.

Once the term for replying to the second questionnaire came to end, the answers provided were also analyzed.

It can be concluded that the Delphi method is suitable for dealing with the analyzed research field because: 1) this is a topic in permanent evolution, 2) it detects key factors to learn about the latest trends related to brands, and 3) experts provide first-hand information. The latter is corroborated by Rowe and Wright, in a study that assessed the effectiveness of this technique through a comprehensive review of research using the Delphi method "... it is quite suitable for problems where the best available information is the opinion of experts" (1999: 363).

With respect to the Focus Group method, we think that this technique is appropriate for explaining the ways in which individuals think, feel and explain their particular situations, by means of speeches or discourses as a way of collecting information. In this way, and taking into account the considerations of Jensen and Jankowski (1993), the information obtained with the application of the selected techniques is deemed valid for the purpose of providing meaning and direction to the studied phenomena.

Numerous high-profile academic and professional researches on aspects related to brands, used qualitative primary sources as tools to gain insight into the attitudes, perceptions and opinions of individuals. The use of these techniques is justified by their qualitative nature, as they allow studying the reality of brands, media and consumers in their natural context, empirically and with a totalizing and integrating approach, that is, all views appearing on the topic under study are valuable and must be taken into account for interpreting the phenomenon to be researched.

Focus Group technique was undertaken on 28, 29 April and 5 May 2015, with three different groups led by the authors. The experts attending the focus group and the topics discussed were the following:

Table 4. Experts in Focus Group, and Topics

Focus Group participants	Field of expertise: leaders from:
– Professionals and experts from the world of communication and brands – Professionals media – Professionals and experts in the new information and communication technologies(ICTs)	– General print media – Media specialized in communication, advertising, branding , CSR – Audiovisual media – New technologies – Video games – *Social media*, *blogs* and networks

Source: Own elaboration.

This was done in order to come closer to their way of thinking and relating to communication, as the profound nature of the information that we may obtain enables us to deepen in the theoretical and global aspects that constitute an expert discourse about these analysed subjects.

The basic script of the focus groups is listed below.

Table 5. Structure and content overview of the three Focus Groups

The group script focused on aspects related to company communication with their audiences and the contents they generate.
–The aspects that the companies want to convey –What interests audiences –Evolution of media in brand communication –Specialized media agenda on brand and branding subjects –Transparency on media and companies –Rankings value and its influence –New trends in communication –The link between product and corporate brands –The brands need of creating contents

Source: Own elaboration.

4. Analysis

The analysis of the results shown below is divided in accordance with the purposes set forth above. Firstly, the contents and main brand platforms, trends in communication and the tools used to measure the advertising effectiveness identified by the experts selected for the Delphi method are shown. Secondly, the study of focus groups composed by professionals from both from traditional media and experts in the use of new ICTs, provides the views of these professionals/experts on the contents used in brand communication, platforms used for dissemination, as well as measurement of the results and future trends thereof. It has been considered opportune to differentiate the results of both research techniques used because, although the subject is similar, Delphi and Focus Groups scripts were different and the experts involved came from different areas of the communication field.

Below are the similarities and differences among the experts who participated in the various methods of research.

4.1. Delphi Method: New discourses in brand communication

1. The contents conveyed by brands in terms of communication are described below. Academics and experts in research argue that communication with consumers is based on the so-called *Advertiment,* i.e., the assumption of the impossibility of reaching a target

audience with a one-way message. Instead, it is necessary to get their consent through a dissemination that involves positive experiences, namely at the point of sale and in the rest of the brand's points of contact. According to a majority of experts, a proposition of sale, covering both objective attributes of the product and behaviors should be enhanced. This whole process of change in the way of communicating products is determined by the influence that target audiences have in brand management. Now, management must be based on co-creation and on the knowledge gained through social networks. They also reflect the importance of identifying and engaging opinion leaders. To detect them, it is important to observe users who, having followers, know how to create conversations and generate mentions.

On the other hand, the group of corporate experts reflects the need to generate a model of influence where brands build a shared belief system with all its target audiences. Brands must thus focus on the communication of benefits, both on line and off line. This is the reason why social networks have turned into a space where citizens are seen as advocates or opponents to brands. Peers generate a direct influence and trust in brands for the majority of citizens. Social networks are loudspeakers where such influence grows effectively. Far from an intrusive communication strategy, brands should manage social networks properly in order to achieve trust and credibility.

The group of experts in the area of advertising and marketing agrees on highlighting that the main contents conveyed by brands are very different and they depend on the sector and on what the brand would like to communicate. Most of them are related to values, satisfaction, positioning, image, price, product features, lifestyle of the target audience, etc. Experts agree that the formats most widely used are no longer the traditional ones (although they are still used). Instead, other forms of communication such as *branded content*, where brands create contents to share their values and create community around the brand, are taking over. Consumers influence brand management and the messages to be created. Points of contact should be bi-directional. Thus, messages must adapt to what customers say. Advertising has a relevant impact on brand value, but is not the only element and, in many cases, not even the most relevant. The weight of paid communication on brand value is diminishing.

Finally, media and planning agencies point out that advertising has an important effect on brand value. When using the appropriate messages and channels, advertising may be able to achieve a higher brand appeal, thus increasing prescription and purchase intent, and also contributing to brand positioning. To be effective, advertising must combine on and off line strategies, and should have the effect that the brand has set as its goal. The main contents and formats used today by brands are diverse, and depend on the sector and the message to be disseminated. Along with more conventional formats such as spots, other forms of communication, more focused on content (product launches, promotions, collaborations with celebrities, news, content related to holidays, tips and tricks of products and services, etc.), and on digital formats (on line videos, e-mails, marketing, product microsites, sweepstakes and contests on social networks, etc.) are gaining prominence.

2. Regarding the platforms and topics used by brands to get closer to consumers, academics and experts in research argue that the physical (or virtual) point of sales needs to suitably represent the brand proposition. In addition, in on line environments, security, availability and offers are deemed important. When using social networks, it seems necessary to control the opinions connected with the brand arising on the web, as well as the descriptions of experiences that users may read. Finally, traditional media are still valid, provided that they can meet the brand's business objectives. In general terms, experts don't underscore a specific platform and topic, but are quite certain that they must be based on *ad hoc* strategies that help build a community.

Specifically, the group of corporate experts recommends not only using social networks to reach consumers, but including a multi-platform customer service and the incorporation of familiar characters to increase the brand's visibility and credibility. In their opinion, the target audiences to be taken into account by brands in terms of their communication strategy are consumers and employees, as they influence the dialog created by brands in the digital realm.

In the area of advertising and marketing, experts highlight that the main platforms that brands should use to converse with their audiences on the on line world are mainly related with consumers and employees, but they also point out some others linked to mass media and Public Relations, particularly Facebook, Twitter and YouTube.

Finally, the most significant platforms highlighted by media and planning agencies for the purpose of favoring a dialog between brands and their target audience focus on the on line world, including Facebook, Instagram, Tumblr and Twitter. It is very important that brands do not appear on general social networks without a previous analysis of where their potential audiences are. They must address the issues that have been identified during research as interesting or demanded by their audiences. Major brands must bear in mind the opinion of consumers when creating their messages and conducting research to identify preferences.

3. Business communication trends underlined by corporate experts are based on a short-term approach and on the integration of means to achieve an immediate impact. Therefore, advertising works efficiently in this regard for the purpose of encouraging purchases. In this sense, emotional messages pursuing an immediate effect, characterize product communication.

The area of Advertising and Marketing states that the new trends in the brand-consumer-product relationship are linked to the Internet. It is important to provide quality content related to the audiences targeted by the product. It is also important to offer exclusivity to a select group of fans, loyal consumers or brand influencers, so that they can try and be part of the product or service configuration (beta testers), or act as advanced opinion leaders and accelerate new products (influencers). Storydoing is underscored as a technique to share a story with actions, not discussions. The place that brands want to occupy in the consumer's mind is no longer defined by them but given by the value that it brings to the lives of people.

While media and planning agencies show that the new trends in the brand-product-consumer relationship are clearly defined by the impact of the digital world, brands must prove that they are able to be close to their customers, that they listen to them and are aligned with their needs and ways of living and thinking. In addition to listening to the general opinion of consumers, brands must be up-to-date with the new social prescribers: bloggers, instagrammers, etc. In short, to achieve recommendations by their target audiences, brands should be more honest and transparent, and use territories, values and topics of interest for the audience in order to ensure their engagement.

4. Finally, with regard to the measurement of effectiveness in brand management, academic and research experts, argue that it is necessary to monitor brand value and sales.

The group of corporate experts states that the AIDA model, as well as the number of users and fans, positive reviews, and the rebound effect, allow for making the necessary adjustments in order to increase advertising effectiveness.

For the purpose of assessing how the brand-product effectiveness is measured, experts in the area of advertising and marketing agree on pointing out the progress and results of sales as the main factor, together with the clients' and stakeholders' reviews. Measurement techniques to capture the "voice of customers" are increasingly used, in addition to NPS (Prescription Net Score) indicators for assessment.

Finally, media and planning agencies emphasize that measuring brand effectiveness depends, generally speaking, on the goals set by each brand and channel (on / off line). Experts agree that the key aspects measured, which include efficiency, memories, attitude, scope on on line media (likes, visits, retweets, etc.), and on / off line sales, come from tracking, web analytics, IRI, Nielsen, Google Analytics, etc.

4.2. Focus Groups: New discourses in brand communication

1. Regarding the contents used in brand communication, some media professionals understand that the digital world has changed contents and created a new way of sharing that translates into new forms of consumption. The emergence of new devices and forms of communication have brought about a change of content to such an extent that the media must undertake new practices, which differ from their traditional professional routines, such as including, as part of their journalistic work, information on brands on a regular basis. They refer, therefore, to the hybridization between journalistic communication and advertising as a new practice that they must embrace. This new communicative context challenges the journalistic classic models and raises new formulas in which the content is not set by the classical issuers.

In addition, one of the axes of change produced by new technologies, especially the development of social networks, refers to the new concept of time for media, since their setting agenda has begun to be seriously affected by the rules of immediacy and direct communication networks. Furthermore, the media must redefine their professional routines and concepts to the rhythm of the new influencers.

On the other hand, new contents have undertaken the leading role in terms of communication, thus encouraging new forms of consumption. However, this discourse argues that new contents have more to do with a new language that media and brands need to use to connect with their audiences and consumers, who are saturated with advertising impacts, and long, as a result, for new forms of connection. It is not so much about new contents, but about new ways of making contents accessible. This focuses the discussion on the media / format level, rather than on the message level. Brands can generate innovative and attractive content, but within the same system. Many professionals still talk about "advertising", but with new terms and tools that reproduce the existing model, which focuses on reputation and prints. In fact, they consider that the new forms of branded content have not revolutionized advertising communication, but are rather radical new versions of traditional advertorials of doubtful effectiveness and profitability, as they are very expensive strategies with a non-standardized return from the point of view of measurement.

In fact, the branded content strategies carried out by brands seeking partnerships between contents and experiences are not always valued in a positive fashion. Multi-platform brand management is often inconsistent with communicative actions and brand values. Consequently, the debate between the independence of media contents and profitability, namely, the advertising content of brands merged into the media flow, entails a loss of independence in exchange for ensuring the survival of the media.

In this new order, the social agenda and new contents lead to pose a discourse in which media professionals and agencies see their role downgraded in favor of new influences: individuals as prescribers and influencers or new informants. This is the most radical change in recent years and the one that most affects their performance communication-wise. Traditional recipients threaten the very concept of issuer, while their role changes to a more proactive one, that turns them into co-creators.

When considering individuals as creators of contents for brands and as influencers for other consumers, a critical position arises, as this consideration is not an emerging social

action from the audience, but a marketing action orchestrated by the companies and agencies themselves. Brands, in view of their loss of effectiveness as legitimate issuers, are trying to control the movements of individuals-citizens within their communication strategies.

2. Regarding new consumption platforms and their targeting capabilities, the media are suffering from an obsession disorder, as a result of the extreme change of scenario: now, the recipient of information or content consumes simultaneously. Thus, with two or more windows, the media are aware of the fact that controlling messages is much more complicated. Target audiences are highly fragmented and this is evidenced by a multi-platform consumption that makes it extremely difficult to analyze both measurement systems and the return of communicative actions.

On the other hand, this new communication landscape brings about an upside that is quite interesting for segmenting recognized brand targets. New media allow reaching individual message segmentation and times, although mainstream media continue to act as an engine for media planning, and to ensure the visibility of brands.

3. As regards future trends, experts / professionals understand that while brands generate significant contents for individuals, the role of the media fades away, because they are no longer the only ones entitled for conveying informative or entertaining contents to society. Today, any social group or individual agent is a source of content creation. Indeed, we are talking about a paradigm shift in which the content is at the core and the roles of issuers and recipients are interchangeable.

Therefore, companies and institutions have acquired social legitimacy as issuers of contents relevant to different groups: up until now, their scope was limited to the exclusive domain of commercial communication and messages favoring the sale of products or services; however, in the new model, citizens begin to recognize the value of communication of some brands, not all of them.

In the pursuit of such value, consistency of the story of the brand with its DNA as company or institution is paramount. To this end, storytelling plays a pivotal role, as it allows building a consistent story for the brand, in line with the values it promotes. Brand value must also be associated with a cognitive positioning that includes, not only the contents and attitudes towards them, but also alignment with the brand's behaviors: from storytelling to storydoing. To achieve that connection with consumers, brands move away from the association to the corporate and institutional spheres to focus on the emotional bond, closeness, and the credible and human aspects. These are the type of associations that may mobilize individuals over the endorsement of corporations or large companies.

In this communicative context, those responsible for new communication strategies will no longer be the media alone, but companies, groups and citizens who contribute to the definition of contents, and who must find their own consumer profile. This has given rise to great concern in the media and brands, which still struggle to achieve a suitable segmentation and access to well-defined niches. In this task, influencers stand as strong adjuvants for media and brands.

4. As for the measurement of communication effectiveness, experts believe that metrics do not yet have a sufficient level of development to ensure neither such effectiveness nor a final return to brands. Measurements are carried out under the same schemes used in the old days, both in the on line and off line media. Therefore, the problem is that, in the face of change, one resorts to the traditional models because there is no other way to contrast, and because it's a language shared by all market players: indicators such as GRP or CTR continue to be handled as references in a sector that, nonetheless, is changing contents, formats and ways of working, while there are innovative formats which measure return based on traditional measurement units. This inconsistency is also joined by the lack of actually-tested metrics, the fragility of the new measures and the immediacy of changes.

5. Discussion

Both the Focus Group and the Delphi method groups provided opinions given by professionals, which were subsequently analyzed. From the adaptive point of view, professionals refer to a vision that questioned and criticized the reaction of the sector to the new contexts of change, in which everything is communication and change, but with contradictions arising from ignorance of the problems to be tackled. They keep on using the physical point of sale to carry out brand proposition, although they are adding virtual points of sale.

This situation of uncertainty causes confusion and skepticism among many professionals who, despite being aware of the latest developments, cling on to the traditional models, somehow incorporating innovations, but always from classic mental schemes of communication. Traditional media are still valid, provided that they can meet the brand's business objectives.

New changes try to be built into models where the issuers are still the media, companies and institutions, and where influencers have become a significant adyuvant in the communication process rather than hindering it, depending on the source of opinion, and despite the fact that it is now known that the place that brands want to occupy in the minds of consumers is no longer defined by the brands themselves, but by its value in people's lives, and by taking into account the opinion of the consumer when creating messages and conducting research to identify preferences.

On the other hand, they also accept that advertising has a relevant impact on brand value –although it is not the only element, or in many cases is not even the most significant–, and admit that the weight of paid communication on brand value is shrinking.

However, from the renewal-oriented point of view, professionals describe a vision that integrates change based on a new communication model, characterized by the centrality of contents which do not have to be innovative or necessarily creative, but relevant to the communities; hence why both brands and media have opted to embrace new languages and new managers –influencers– to achieve their much-desired connection with consumers.

Consequently, they are committed to combining on and off line strategies, and opt for contents that connect with their audience through insights. The strategies followed by brands for achieving positive feedback from their target audiences and approaching them consist of proposing relevant content and offering experiences and useful tools, such as branded content, geolocation, personalized recommendations, etc., all of which are innovative techniques and tools at the same time relevant for the union of the brand with the consumer.

Both approaches –renewal-oriented and adaptive– share the same topics for discussion over which it seems necessary to reflect and express ideas. However, the meaning of the discourse and meanings built around communication and brands are very different. While adaptive vision may understand that agents, structures and processes are shaped to accommodate the digital world, in the case of the renewal-oriented vision, brands and media have had to come up with a new playing field and define new rules, listening to the general opinion of consumers and paying attention to new social prescribers: bloggers, instagrammers, etc. In short, to achieve recommendations by their target audiences, brands should be more honest and transparent, and use territories, values and topics of interest to the audience in order to ensure their engagement.

While the adaptive speech continues to consider segmentation capabilities for reaching different profiles or groups, the renewal-oriented discourse speaks only of customization, of contents tailored to each individual. There are no distinctions or comparative models,

because they take on the full existence of a new model of communication that defines our new reality.

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