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COMMUNICATIVE STRATEGIES OF SPANISH ADVERTISERS AGAINST COVID-19

ESTRATEGIAS COMUNICATIVAS DE LOS ANUNCIANTES ESPAÑOLES FRENTE A LA COVID-19

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ABSTRACT

The crisis caused by COVID-19 seems to have caused major changes in advertising in our country. In this work, we try to identify where these supposed changes have taken place and how they have affected the strategies of the main advertisers. We must bear in mind that our proposal is based on continuous monitoring of the activity of Spanish advertisers, which allows us to determine whether the changes that have occurred are truly important or whether this crisis (like the previous ones) has simply consolidated modifications or evolutions that were already gestating long ago. To meet this objective, we address three lines of work: bibliographic analysis, analysis of primary sources, and applied fieldwork on the campaigns of the main advertisers, in terms of investment, in Spain. With all this, we will be able to provide some initial conclusions about the response of advertisers, even creating a specific strategic model to be able to analyze the campaigns broadcast in this period and, above all, determine what strategy they respond to.

Keywords: Advertising; Crisis; Covid-19; Strategies; Advertisers; Communication; Consumers.

RESUMEN

La crisis provocada por la COVID-19 parece haber provocado grandes cambios en lo relativo a la publicidad en nuestro país. En este trabajo intentamos identificar dónde se han producido esos supuestos cambios y cómo han afectado a las estrategias de los principales anunciantes. Debemos tener en cuenta que nuestra propuesta parte de un seguimiento continuo de la actividad de los anunciantes españoles, lo que permite determinar si los cambios que se han producido son verdaderamente importantes o si, simplemente, esta crisis (como las anteriores) ha consolidado modificaciones o evoluciones que ya se gestaban tiempo atrás. Para hacer frente a este objetivo abordamos tres líneas de trabajo: el análisis bibliográfico, el análisis de fuentes primarias y el trabajo de campo aplicado sobre las campañas de los principales anunciantes, en términos de inversión, de España. Con todo ello podremos aportar unas conclusiones iniciales sobre la respuesta de los anunciantes

creando incluso un modelo estratégico específico para poder analizar las campañas difundidas en este periodo y, sobre todo, determinar a qué estrategia responden.

Palabras clave: Publicidad; Crisis; Covid-19; Estrategias; Anunciantes; Comunicación; Consumidores.

ESTRATÉGIAS COMUNICATIVAS DE ANUNCIANTES ESPANHÓIS CONTRA COVID-19

RESUMO

A crise causada pelo COVID-19 parece ter causado grandes mudanças em relação à publicidade no nosso país. Neste trabalho procuramos identificar onde ocorreram essas supostas mudanças e como elas afetaram as estratégias dos principais anunciantes. Devemos ter em mente que nossa proposta se baseia no monitoramento contínuo da atividade dos anunciantes espanhóis, o que nos permite determinar se as mudanças ocorridas são realmente importantes ou se esta crise (como as anteriores) simplesmente consolidou modificações ou evoluções que já estavam se gestando há muito tempo. Para cumprir este objetivo, abordamos três linhas de trabalho: análise bibliográfica, análise de fontes primárias e trabalho de campo aplicado nas campanhas dos principais anunciantes, em termos de investimento, na Espanha. Com tudo isso poderemos fornecer algumas conclusões iniciais sobre a resposta dos anunciantes, inclusive criando um modelo estratégico específico para poder analisar as campanhas veiculadas neste período e, acima de tudo, determinar a qual estratégia eles respondem.

Palavras-chave: Publicidade; Crise; Covid19; Estratégias; Anunciantes; Comunicação; Consumidores.

Translation by **Paula González** (Universidad Católica Andrés Bello, Venezuela)

1. INTRODUCTION

The crisis caused by the Covid-19 pandemic in 2020 and 2021 has created a new scenario for advertising companies. Although crises are not new in recent history, it is the first major health crisis of the 21st century without having precedents of this type in many decades. The paralysis of activity due to quarantines, as well as the limitations on people's mobility and the establishment of security measures that have changed consumer habits, has caused an economic, trust, and even values crisis that puts on the table new challenges.

From a strategic perspective, the change in scenario and objectives of companies implies a change in communication proposals. For this reason, and taking into account the follow-up that the Faculty of Social Sciences and Communication of the Universidad de Vigo has carried out on the strategic trends implemented by advertisers in our country, it is essential to focus on how we are responding to this important social change.

2. OBJECTIVES

Taking all of the above into account, our objective in this research is focused on identifying the possible changes in strategy made by the main Spanish advertising companies to adapt to the circumstances of Covid-19. Starting from this basic objective, we will attend to other secondary objectives:

- Establish a compilation of basic data on the strategic decisions made by advertising companies regarding their communication in the pandemic and post-pandemic periods.
- Assessment of the type of changes produced in this period (structural or conjunctural).
- Analysis of the strategic planning process of the main advertisers in the country, taking into account the different levels of strategic subordination (company, marketing, and communication).

More precisely, we are going to focus our attention on the companies that invest the most in advertising in our country, understanding the advertising concept in a broad sense and not only referring to the traditional means of disseminating commercial messages. In this way, we pay special attention to the management of social networks and promotional actions that involve direct contact with consumers. It is a general analysis of the sector that, however, focuses on identifying specific strategic changes, applying classic analysis models, as we will see in the section on methodology.

3. METHODOLOGY

3.1 Starting hypothesis

To carry out our research, we establish some starting hypotheses that direct the work. For this, we start from the most general to the most specific following the classic strategic planning process (García Uceda, 2007): the sector, the company, marketing, and communication; later adding the development of that communication strategy through a creative strategy and a media strategy.

- The Covid-19 crisis has aggravated the situation of the Spanish advertising sector which, until then, seemed to be recovering from the 2008 financial crisis.
- Although the crisis has had a negative impact on the advertising sector, some of the changes it has caused (as in the case of the 2007 crisis) are structural in nature and not temporary.
- The most important changes in the advertising sector have not occurred in the structures of the sector (as in previous periods of recession) but rather it is the receivers or potential audiences that have generated deeper and more radical changes, making it necessary for advertisers to adapt.
- Strategic changes have barely had an impact on business strategies with stable

business models, having to apply changes in marketing strategies, especially concerning distribution and communication, which differs from the previous crisis, with changes that affected the price and the product.

- Regarding changes in communication strategies, the importance of redefining audiences determines the approach of new positions and the reconceptualization of products, which have been adapted to the specific needs of the pandemic in some cases or have been adapted to the new market.
- The objectives of communication strategies have changed as a result of changes in the market itself and the public, making it necessary to establish relationships of trust that, little by little, were lost, being this loss aggravated by Covid-19.
- The development of these strategies implies the creation of new messages, something that also differs from the 2007 crisis since their development requires a significant investment in creativity, which had been cut to record highs in the previous decade.
- The changes in the media plans of the campaigns are reality before the Covid crisis since the reality of media consumption had already been modified in previous periods.

3.2 Research proposal and methodology

As we have initially indicated, we do not start from an innovative proposal, but we apply a model already developed in other works (Torres-Romay, 2005 and 2011). This circumstance allows us to apply a methodology that is not only descriptive but also comparative, establishing differences between the response to the previous crisis and the consequences of the current one.

For the development of the proposed work, responding to the starting hypotheses and following the path marked by the research objectives, we developed a methodology in three phases. The first focuses on determining the state of the issue, starting from a follow-up of recent academic work on the subject and continuing with the consultation of primary reference sources such as Infoadex, Arce Media, or Kantar Media, among others. With these data, we will be able to determine the current situation of the advertising sector in our country, in terms of investment, main advertisers, agencies, and media.

In the second phase, we proceed to carry out fieldwork in which we apply the model of subordination of strategies (Pérez, 1995) that allows us to compare the strategies developed in previous periods with the current ones, starting from the general strategy of the company and continuing with the marketing strategy. In the latter, different indicators are monitored that will allow us to determine the evolution regarding price, products, and, of course, communication.

In the third phase, the advertising strategies are analyzed, for which the main advertisers in the country have been taken as a reference. On the sample of these

brands, a follow-up has been carried out in terms of the messages and media used, allowing this analysis, once again, to make comparisons with previous periods. Finally, conclusions can be drawn around the starting hypotheses initially raised.

4. RESULTS

4.1 The academic study on communication and the COVID-19 crisis

As a starting point for our research, we have carried out a bibliographic review of the scientific production on the relationship between communication and COVID-19. From this point of view, we must differentiate between two basic lines: strictly academic works published in scientific journals or as book chapters; or reports of a professional nature, generally published by organizations, companies, or institutions in the communication sector and which usually give a quantitative approach to the assessment of the COVID-19 situation.

In the first line, we have carried out a follow-up through the specific search engine "Google Scholar " which has resulted in a first consideration around the large amount of scientific production generated around this topic, thus marking the difference from what happened in previous crises, where the specific academic contributions to analyze the matter were scarce and published much later. However, the factor of publication speed may have influenced the fact that most of the works collected address very specific and delimited aspects, without being able to identify major proposals that assess the full reality of the phenomenon.

We must clarify that we track the first 10 pages of results obtaining 100 entries. From this total, we eliminate the publications that do not address the national perspective of the subject, which add up to a total of 43 articles, most of which refer to Latin American countries. We also subtract 3 duplicate entries and up to 5 references of Final Degree Projects positioned in university repositories. Thus, we obtain a final sample of 39 texts corresponding to journal articles (35), book chapters (2), and communications to Congresses (2). It is a representation of the publications on the field that have achieved a better position and that, therefore, help us to assess what research has focused on in the field of communication related to COVID.

As a reference, we summarize the review carried out by grouping specific thematic lines. Thus, among the most numerous are the works on institutional communication (9), addressing the management that the government (Ibáñez, 2020) and other public institutions (López-García, 2020) have made of the crisis and, therefore, researching from the field of Public Relations (Castillo-Esparcia; Moreno, & Capriotti, 2020), paying attention to elements such as the spokesperson (Rojo, Moreno & Soler, 2020; García-Santamarina, Pérez-Serrano & Rodríguez Pallares, 2020). We insist on working from the academic perspective of crisis communication circumscribed to the management of those crises that institutions make (Losa, Fernández, and Paniagua, 2020) incorporating what is related to managed digital communication (Poch Butler and Puebla Martínez, 2021).

In a second group we include the works related to the media (9) both from the perspective of the information transmitted about the crisis (Lázaro-Rodríguez and

Herrera-Viedma, 2020; Vállez and Pérez, 2020), and the role of media professionals (Aleixandre-Benavent; Castelló-Cogollos and Valderrama-Zurián, 2020) or media management carried out by public institutions (Castillo-Esparcia, Fernández-Souto, and Puentes-Rivera, 2020), all of them published in the monographic issue that "El Profesional de la Información" dedicated to COVID. The references to the reception of the media are punctual (Román et al., 2020; Mora and Melero, 2021) and the works that address information in the different digital media or social networks are of great interest (Arrufat, 2021).

Precisely from this perspective, in the digital ecosystem, a good number of references are obtained (10) which, as we have indicated, focus on very specific and precise aspects, addressing small-sized samples or objects of study. This is how YouTube channels (Orduña-Malea, Font-Julián, and Ontalba-Ruipérez, 2020; Ramírez and Travesedo, 2020) or certain social networks (Rivas and Calero, 2020; López Tárraga, 2020; Ramón-Vegas, Mauri-Ríos, and Rodríguez-Martínez, 2020), and even the role of "influencers" (González and Iriarte, 2020) are analyzed.

Nor can we lose sight of the fact that communication around COVID has also been addressed as a communication problem for health (6), taking into account the communication needs that arise (Sierra, 2020; Avellaneda-Martínez et al, 2021) and, especially, the problems created by the generation and dissemination of fake news (Ramón, 2020; Andreu-Sánchez and Martín Pascual, 2020; Alcázar García, 2020). Health communication management was another group of interest (Castro-Martínez and Díaz-Morilla, 2020), with works on communication with patients (Cerezo, 2020) and resources to raise awareness of the disease (Martínez, 2020).

To a lesser extent, we have also come across works related to the impact of COVID on communication education (4) and other miscellanies of proposals that address issues such as culture (García-Martí, Ortega-Mogedado, and Pérez-Peláez, 2021) or social representations (Páez and Pérez, 2020), with only one reference of works that address communicative management from a business perspective, taking into account the reputational risk that this situation may entail (Xifra, 2020).

From this analysis, we conclude that there are no reference academic works on the implications of COVID in the advertising sector since they are addressed in a concrete way, not as a general communicative phenomenon. To find an analysis regarding this relationship we must perform a specific search or focus on the professional reports of the sector. Thus, for example, we find data on the incidence of COVID in Spanish advertising in the 2020 report of the "Observatory of Advertising in Spain" of the Spanish Association of Advertisers and, specifically, there are several consultancies that carry out publications of analysis in this regard, such as Sortlist (2021) with a marketing barometer entitled "The impact of the Covid-19 crisis on the advertising and marketing industry". All this affects the need to address our objective from an academic and professional perspective and, above all, with a point of view of treating advertising as a basic communicative phenomenon and not different from the reality of media consumption and communication management of the institutions.

4.2 Current situation of the Spanish advertising sector

To know the incidence of the COVID-19 crisis in the Spanish advertising sector, we must know our starting point by attending to the basic structure of the communication process and establishing four basic subjects of the process. In this way, we start from the existence of a series of fundamental advertisers in terms of advertising investment (Table 1) that, despite the crisis and even in comparison with previous periods of recession - we have marked 2008 as a point of reference-, seem to not have changed. In fact, we can collect data indicating that the expected reduction in budgets due to COVID was not going to be as drastic as on previous occasions (by a maximum of 30%) (Good Rebels, 2020). Added to this are initiatives focused on the consolidation of digital commerce and special attention to the user experience, which brings to the table new needs regarding advertising communication more focused on Cross-Channel and integrated advertising (Corredor-Lamas, 2021).

As the second subject of the process, we would have the advertising agencies, in charge of creating the content. Perhaps it is in this block where the results are most surprising since the sector makes a positive balance that is estimated, according to the Spanish Association of Advertisers (aea), in a 5.2% increase in the volume of advertising companies in our country in 2020. This is a positive figure, although it has been determined that the turnover fell by 22.9%, falling in 2020 to 108.9 compared to 131.8 in 2019 as a result, mainly, of the pandemic, although it is located above the annual average, a fact that had not occurred in any of the previous crises. This new scenario may be related to the media reality we are facing and to the consolidation of digitization processes, which has not only allowed 100% of agencies to telecommute (according to data from the COVID-19 Crisis Management Study in independent agencies carried out by the Federation of Spanish Agencies – FEDE), but the activity of many sectors has been able to maintain itself thanks to online commerce.

Table 1.

Main advertisers according to advertising investment (2007-2020) mill. of euros

Advertisers	2020		2019		2018		2017		2016		2015		2014		2013		2012		2011		2010		2009		2008		2007	
	Rk	Value	Rk	Value	Rk	Value	Rk	Value	Rk	Value	Rk	Value	Rk	Value	Rk	Value	Rk	Value	Rk	Value	Rk	Value	Rk	Value	Rk	Value	Rk	Value
Telefónica S.A.U.	4	49,4	8	52,6	12	43,4	Scd	sd	11	38,3	10	42,3	9	45,3	5	56,1	4	67,4	3	113,4	2	131,0	1	129,3	1	173,8	1	171,2
Procter & Gamble España S.A.	2	64,4	5	67,0	5	69,9	3	71,5	2	70,0	1	98,4	1	111	1	122,4	1	105,1	2	123,8	3	132,2	2	111,4	2	131,9	2	146,6
L’Oreal España S.A.	3	61,0	3	69,6	6	67,7	5	58,8	4	66,5	3	67,5	3	59,3	2	79,4	3	79,6	4	92,2	5	105,5	3	97,0	3	107,7	3	121,1
El Corte Inglés S.A.	7	47,7	2	74,0	2	85,3	1	89,6	1	76,5	2	80,4	2	76	3	76,8	2	86,9	1	171,3	1	174,3	4	90,0	4	96,4	4	110,1
Vodafone España S.A.	8	45,3	10	49,6	15	42,2	7	53,9	7	50,1	6	62,4	6	52,5	4	63,4	5	61,6	7	59,7	6	77,6	6	71,7	5	87,5	6	80,9

Volkswagen-Audi España	5	48,6	1	84,5	1	86,9	4	70,1	3	68,6	4	56,9	4	59,3	6	56,0	6	61,1	5	85,1	4	111,5	5	73,5	6	86,6	5	99,5
Renault España Comercial S.A.	14	35,0	14	40,0	10	47,1	14	42,1	10	39,8	17	31,3	16	29,6	18	25,6	14	31,0	14	34,5	16	36,3	20	32,3	7	69,7	7	74,2
Danone S.A. 2017 – Nestlé	12	37,1	sd	sd	sd	sd	19	28,9	12	36,0	9	42,7	10	38,5	10	41,7	8	41,3	9	50,0	9	59,9	7	61,2	8	67,7	10	70,1
ING Direct, Suc. España	sd	sd	sd	sd	sd	sd	18	29,1	sd	sd	12	33,0	sd	sd	7	47,0	7	57,8	8	57,1	11	44,6	8	56,6	9	61,4	8	72,5
France Telecom España, S.A. 2015 – Orange	1	64,5	6	64,3	3	74,1	2	73,0	8	4,4	11	40,7	11	38,5	9	42,6	11	39,3	10	49,5	7	71,7	10	45,6	10	58,4	9	47,7

Source: Infoadex, 2021.

Regarding messages, as the third subject of the advertising process, there are analyzes of which content trends were the most used by advertisers. In this way, according to data from the Group M consultancy regarding 2020 in the face of COVID, 88% of companies decided to provide practical information or advice that would help people face the situation; 84% suspended normal factory or business production to help produce essential supplies; 83% provided fun and light-hearted content or videos to entertain people, and 75% advertised how they were responding to coronavirus or helping customers. These data seem to confront the supposed "value communication" that should mark the communication lines of advertisers during COVID (Rodríguez-Bravo et al, 2021) but it does recognize the importance of advertising to contribute to compliance with security regulations in the face of the pandemic.

The last subject in the chain of the advertising communication process is traditionally the receiver. In this regard, we must bear in mind that consumption trends in our country were already showing significant changes before the pandemic. In this way, the Spanish consumer was characterized, according to Eurobarometer data (2020), by a great social and environmental responsibility that translated into actions of "environmental activism" when consuming, such as the reduction of plastic, the taking of measures against climate change, limiting food waste, or recycling. In "social activism", it promised to buy brands that support social values or to make donations. Added to this consolidation of values are changes in behavior such as the preference for outdoor activities but also the assumption of the so-called "phygitality" as a hybrid between physical and digital reality. If we add to all of the above the changes in consumption that the COVID crisis finally consolidated (Montaña, Ollé, and Lavilla, 2020), we obtain a very different scenario, but not far from what was expected.

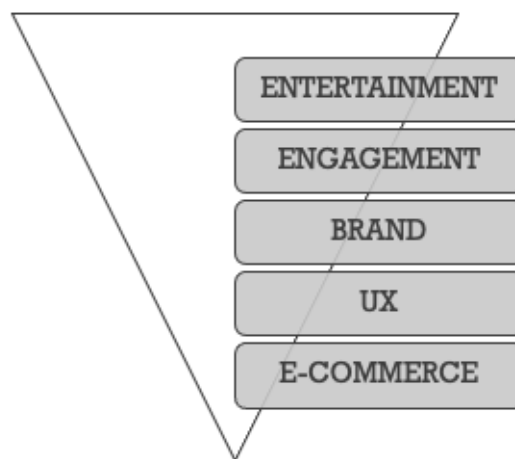
5. CONCLUSIONS AND DISCUSSION

As an objective of our work, we had marked "identifying the possible changes in strategy made by the main Spanish advertising companies to adapt to the circumstances of Covid-19". After the analysis carried out, we must modify the proposed model and start, precisely, with the last point. It has been the changes in

the consumption trends of the potential advertising recipients that have had the most notable effect on these possible changes in strategy. According to the data collected both in academic and professional works, as well as in the campaigns developed by advertisers, we have observed how a new "Customer Journey" is proposed, from the most current perspective of the term (Tueanrat, Papagiannidis, and Alamanos, 2021). An ecological and digital consumption model is consolidated according to PWC data from 2021. Thus, 50% of global consumers have become more digital and 40% more "ecofriendly". In Spain, 35% of consumers surveyed in the PWC study buy via mobile and say they have focused more on saving, taking price into account when making their purchase decisions.

The modification of the "Customer Journey" during the pandemic responds to the search for new incentives by the consumer motivated by the consolidation of their new scale of values and behavioral models. Thus, the relationship between the advertiser and the public is carried out through entertainment content as a fundamental basis of current content strategies. This relationship allows establishing a base of engagement between the advertiser and the public, which makes it possible to start communicating brand content. This is the critical point where the brand must provide a positive consumer experience (UX) that can become a commercial transaction through digital platforms (e-commerce).

Figure 1
Customer Journey proposal after COVID-19



Source: Own elaboration, 2022.

The model thus designed allows us to go a step further and identify whether the campaigns launched by the main Spanish advertisers (Table 1) fit this proposal. In this way, we can see how brands have developed campaigns that correspond to some of these phases (Table 2), with the engagement level being the most developed.

We find ourselves, therefore, in a context in which the crisis has consolidated the changes that had been taking place for some time. This implies changes in the communication sector, although in terms of opportunity and not a crisis, as could be

initially foreseen. The changes in the consumption model entail changes in the markets, but, on this occasion, there have been no radical reductions in communication budgets, but rather an attempt has been made to fulfill a very specific role within the new "customer journey". The need to maintain a good position and to manage to establish a good user experience seems to have motivated the new strategic design of advertisers who, also, thus face the Social Responsibility that the new consumer demands. Content strategies are, therefore, the key and it will be necessary to maintain permanent observation to analyze specific data on the results (in terms of effectiveness) of the initiatives undertaken during 2020.

Table 2.
Strategic lines used by the main advertisers in Spain (January 2020)

	Advertisers	Strategic level
1	Orange Espagne S.A.	ENGAGEMENT
2	Procter & Gamble España S.A.	BRAND
3	L'Óreal España S.A.	ENGAGEMENT
4	Telefónica S.A.U.	BRAND
5	Volkswagen Group España S.A.	ENGAGEMENT
6	Línea Directa Aseguradora S.A.	ENTERTAINMENT
7	El Corte Inglés S.A.	E-COMMERCE
8	Vodafone España, S.A.U.	ENTERTAINMENT
9	PSAG Automóviles Comer. España S.A.	BRAND
10	Mutua Madrileña Automovilista S.A.	BRAND
11	Cia.Serv.Beb.Refresc.S.L. (Coca-Cola)	ENTERTAINMENT
12	Nestlé España, S.A.	ENGAGEMENT
13	Toyota España, S.L.U.	ENTERTAINMENT
14	Renault España Comercial S.A.	BRAND
15	Ford España, S.L.	BRAND
16	Organización Nacional de Ciegos Espa.	ENGAGEMENT
17	Samsung Electronic Iberia. S.A.	ENTERTAINMENT
18	BBVA. S.A.	ENTERTAINMENT
19	Securitas Direct España, S.A.U.	ENTERTAINMENT
20	Xfera Móviles, S.A.U.	E-COMMERCE

Source: Infodex and own elaboration, 2021.

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