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Advertising and media agencies in the face of the change in the media ecosystem

La publicidad y la agencia de medios frente al cambio en el ecosistema mediático

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ABSTRACT
The advertising industry is currently experiencing a structural change resulting from a closer relationship between technology and the media. The aim of this article is to examine the challenges that will be faced by advertising professionals in this new media ecosystem. In order to do so, an exploratory research project has been conducted to analyze the opinions of professionals through an online survey, primarily in Spain and Latin America. The results identify how traditional media are migrating towards a cross-platform approach which makes it easier for individuals to permanently access audiovisual content. In this regard, new points of contact with the consumer emerge as a result of interactions with mobile devices and social networks, evolving towards marketing 4.0, where the capacity to anticipate trends and give predictions prevails, considering that each brand must know what consumers need before they require it.

Keywords: media agencies, the media, social media, the Internet, advertising.

RESUMEN
El sector de la publicidad vive una situación de cambio estructural, consecuencia de una mayor cercanía entre tecnología y medios de comunicación. El objetivo de este artículo es reflexionar sobre los desafíos a los que se enfrentará el profesional de la publicidad en este nuevo ecosistema mediático. Para ello se ha planteado una investigación exploratoria destinada a recabar la opinión de los profesionales mediante una encuesta vía Internet, distribuida en España y Latinoamérica principalmente. Los resultados plasman cómo la división actual de medios tradicionales tiende a una conversión multiplataforma que facilita que el individuo acceda permanentemente a contenidos audiovisuales. En este sentido, surgen nuevos puntos de contacto con el consumidor, derivados de la interacción con los dispositivos móviles y las redes sociales, evolucionando hacia el marketing 4.0, donde prevalece la predicción y la capacidad de anticipar tendencias, ya que cada marca debe conocer lo que el cliente necesita antes de que lo requiera.

Palabras Claves: *agencias de medios, medios de comunicación, medios sociales, Internet, publicidad.*

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INTRODUCTION

Since the end of the 20th century, the professional advertising industry has been immersed in a situation of structural change, motivated mainly by two strongly interrelated factors: the transformation in the media system caused by the technological revolution (Scolari, 2012) and the empowerment of the consumer or user (Fernández Cavia & Sánchez Blanco, 2012; Kerr, Mortimer, Dickinson & Waller, 2012). In certain countries, a third circumstantial but very significant factor has been added to these two structural factors in recent years: the economic downturn.

What the response of the sector to this new context is and should be is still not entirely clear (Hull, 2009), although some trends can already be observed in the field of enterprises (Grant, McLeod & Shaw, 2012; Gregorio, Cheong & Kim, 2012) and among professionals (Wright-Isak, 2012) or in the development of professional activity (Sasser, Koslow & Riordan, 2007).

Companies have been criticized because of their hard-to-justify lack of adaptation in a business which embodies creativity as its essence. Professionals have been accused of resistance and slowness to adapt to the new knowledge and renewed processes the current context requires. With regard to advertising, there are various ways in which it tries to adapt to the new media landscape; for example, colonizing informational spaces on television (Fernández Cavia, 2005; Fernández Blanco, 2008; Santín, 2013), transferring much of the budgets to the Internet (Pérez-Latre, 2007) or trying to take advantage of the use of social networks (Mangold & Faulds, 2009; Kaplan & Haenlein, 2010).

In this article we will discuss how advertising professionals interpret changes in the media ecosystem and how they conceive the role that media agencies should play in the future on this new context.

THEORETICAL FRAMEWORK

This article is based on two theoretical frameworks: from the conceptual standpoint, media ecology; and from the methodological point of view, grounded theory.

Media ecology understands the media as if it were a biological ecosystem. Accordingly, for this approach the study of media should devote special attention to the way in which they interact with one another and, in doing so, make up an environment in which human activities are developed and molded by them.

In the words of Scolari (2012), "media ecology tries to find out what roles media force us to play, how media structure what we are seeing or thinking, and why media make us feel and act as we do" (p. 205). In this respect, advertising is a professional activity unfolding in a media ecosystem that determines its way of acting and its evolution.

Media centrality is moving, slowly but surely, from television to the Internet, thus creating a new "media landscape" (Pérez-Latre, 2007). Now it is basically the web that dictates the way in which we relate to other media, i.e., the press, radio, television, film or video games, in the same way that television had previously altered the media ecosystem and restated its rules (McLuhan, 2005). As a result, the organizational structures, professional routines or assessment methods employed in the past in the advertising industry do not conform to the current communication system, colonized by new "species" (Scolari, 2012, p. 214) such as websites, blogs, video games, social networks or mobile applications (Pérez-Latre, 2009).

To try to understand how advertising interacts with and, at the same time, is determined by the new media ecosystem, in this paper we analyze opinions and conceptual constructions made by advertising professionals with regard to their discipline. To this end, we start from the basic assumptions of grounded theory, advancing from the analysis of empirical data compiled in research to the development of hypotheses and theories (Glaser, 2002). The aim is to work in an inductive manner based on empirical observations in order to discover trends in study or reconsider existing theories or concepts. Along these lines, we apply a methodology similar to that of other preceding studies on ideas shared by advertising professionals (Nyilasy & Reid, 2009).

By approaching the object of study from this perspective, we seek to "understand the problem situation experienced by a group of participants and how they dealt with this problem" (Ng & Hase, 2008, p. 155).

OBJECTIVE AND METHODOLOGY OF THE STUDY

The overall objective of this research is to identify the main trends of change that advertising professionals perceive. To do this, the following research questions were asked:

- RQ1: What are the major changes in the media ecosystem perceived by advertising professionals?
- RQ2: How do professionals think that the changes in the media ecosystem will affect advertising?
- RQ3: What, in the opinion of professionals, will be the role played by media agencies in the future?

Accordingly, this is an exploratory research project in which we have chosen to gather the opinion of professionals using an online survey. The questionnaire consists of several open questions offering "the possibility of deeper responses, while enabling to inquire about the how and why of the respondents' manifestations" (Wimmer & Dominick, 1996, p. 115).

SAMPLE

We established the universe of the study to be professionals related to communication and advertising who are working or have recently worked in these areas. In order to delimit the scope of study, the questionnaire was essentially sent to professionals in Spain and Latin America, ruling out other geographical areas at present, although this will not prevent the sample from being expanded upon to incorporate professionals outside of this Spanish-speaking area in the future. The final selection was made following initial contact by phone or email with the candidates to briefly explain the project and ask them whether they would agree to participate in the study. Once the experts agreed, we expressed our gratitude for their participation by email and they were notified that they would receive the questionnaire shortly.

The final sample comprised 33 professionals, a number within the optimal dimensional range, taking into account the type of methodology applied. Along with Spain, the panel of experts was formed by professionals from the main countries in Latin America, measured according to their investment in advertising, with Colombia standing out as a reference for the Andean region. We also included professionals with pan-regional responsibilities and from the United States of America, the global benchmark market in terms of trends and advertising innovations accounting for more than 50% of world advertising investment. Accordingly, we would benefit from a perspective on the main global trends with regard to the topic of study.

Table 1 shows the geographical distribution of the proposed panel.

The members of the panel are high-level professionals who combine expertise and heterogeneous experience that enables them to have historical insight and a global perspective of the subject of study. They are

Table 1. Distribution of the sample according to the geographical area of responsibility of the respondents

Geographical area of responsibility	Number of participants	Percentages
Spain and Portugal	15	45
United States	2	6
Latin America	16	48
Argentina	2	13
Brazil	1	6
Chile	1	6
Colombia	7	44
Mexico	2	13
Peru	1	6
Regional coordination	2	13
Total	33	100

Source: compiled by authors.

Table 2. Sample distribution according to the type of company where respondents work

Type of company	Number of participants	Percentages
Media agencies	8	24
PR agencies	1	3
Performance marketing agencies	2	6
Creative advertising agencies	2	6
Digital advertising agencies	3	9
Advertisers	8	24
Associations	1	3
Academic center	2	6
Consulting companies	1	3
Research institute	2	6
Medium	3	9
Total	33	100

Source: compiled by authors.

related to different areas of communication and advertising, such as media agencies, creative advertising agencies, PR agencies and agencies specialized in digital and performance marketing. We also included in the sample managers of marketing and communication consulting companies, managers of associations and research institutes, researchers of acknowledged prestige in the field of advertising and executives from advertisers who have responsibility for the advertising and media of their brands. The media, both offline and online, are also part of the panel. Thus, the analysis is enriched as valuable approaches are drawn from several points of view. The panel also includes academic experts, giving us a perspective on the future from professionals and researchers.

PREPARATION AND CONTENT OF THE QUESTIONNAIRES

The questionnaire was divided into three clearly distinct blocks. The first included a brief introduction of the aim of the research; instructions were given for its completion, such as the deadline for reply; and confidentiality and anonymity of responses was assured. The second block requested personal and professional data from the expert (socio-demographic variables such as age, sex, city and training; and work experience data such as the companies worked for, seniority and positions held), to contrast them with data held by the researchers. The third block sought to identify the main change trends in the media ecosystem according to the perception of advertising professionals and to also seek their opinion on what the future role of media agencies would be inasmuch as they constitute a fundamental piece in the equation of communication and, in particular, of advertising, as they manage the advertiser's most important marketing budget allocation.

The procedure used to determine the items that would be included in the third block of the questionnaire was based on theoretical knowledge, stemming from a review of literature and previous interviews with professionals in the field of study, along with the professional and academic experience of the researchers. We prepared a list of ten open issues classified under the three theme-based dimensions in order to organize them and make them easier to complete. These theme-based dimensions or sections were classified so that, firstly, certain issues would be raised to contextualize the object of study; we continued by studying the consumer and the media and then advanced on to the role of media agencies. At the end of this third block, we invited each expert to propose any new factor or variable in relation to the topic of study which they considered relevant and was not included. We also added an item about who they considered should form part of this panel: this aspect was important as it was intended to validate the expert participants in the process as people who the professionals themselves qualified as having greatest impact in the sector.

We raised open questions to obtain more valuable results and also to minimize the influence of the researchers in the process. According to evidence from previous projects on the negative influence of excessively short or long questions, in most cases we sought a length of variables considered ideal; namely, 25 words (Salancik, Wenger & Helfer, 1971). The wording was clear and familiar to experts, avoiding ambiguities. Table 3 shows the series of open questions in relation to each theme-based dimension:

The surveys were conducted between September and October 2013. The deadline granted for experts to respond was fifteen working days, after which the 33 questionnaires were received. From this moment on, we compiled and analyzed the responses, setting out the results in easily interpretable and comprehensible tables; information was summarized avoiding redundancies, but respecting the experts' ideas, and we elaborated the conclusions appearing in this article.

Table 3. Dimensions and research questions

1. Change of the advertising paradigm
a. Advertising in general is experiencing moments of change: which factors (social, technological, economic, among others) do you think will determine the evolution of advertising in the next five years?
b. The effectiveness of conventional advertising on purchasing behavior is declining: do you agree with this statement? Please justify your answer.
c. The consumer is also changing: their values, the way of relating, habits of consumption and, among them, the way they consume media. In your opinion, what are the main factors that are driving these changes?
2. Changes in the media
a. The media have also changed: from mass communication we are moving to more individual media consumption: do you agree with this hypothesis? Please justify your answer.
b. What role will new technologies play in the media in the next five years?
c. In your opinion: how will the behavior of individuals be affected in terms of media consumption due to technological advances?
3. The role of media agencies
a. Do you agree with the media buyer (name this type of advertising agent had historically been given) now being called a media agency? Please argue your answer.
b. On the assumption that traditional advertising is losing effectiveness, in your opinion, what can media agencies do to revive the role of advertising?
c. In relation to the new communication needs a brand will require in the next five years, which ones do you think a media agency should meet? What services and products do you think a media agency should offer to its customers?
d. Given the outlook, do you think media agencies are prepared to meet the new needs of advertisers? Please argue your answer.
4. Complementary information
a. I invite you to propose any new factor, variable or section on the subject of study that you consider relevant and is not present in the questionnaire you have just completed.
b. Finally, with the idea of extending the panel: could you consider and recommend any colleague (of acknowledged experience and impact in the sector) to be part of this panel?

Source: compiled by authors

RESULTS

CHANGE OF THE ADVERTISING PARADIGM

General questions were grouped under this theme to contextualize the object of study. It is indisputable that the advertising world is transforming at a rapid pace. We should recall Kotler when he says that in the last 60 years marketing has moved from the "product" as the center of gravity (marketing 1.0) to the "consumer" as the essential point (marketing 2.0) and that it is moving towards marketing 3.0, focused on values and interaction with people based on mutual cooperation, oriented to make the world better and more sustainable (Kotler, Kartajaya & Stetiawan, 2010). The majority of the surveyed experts (from now on each response will be identified with the code En, where n is the number with which each respondent has been identified according to the order of receipt of the survey) coincide in affirming that advertising is experiencing moments of change. They mainly point out three factors: technology, new consumer behaviors and the media offer as decisive in the evolution of advertising.

Beyond doubt, the technological development is closely linked to the emergence of the Internet, which today is already mobile: "There are more mobile devices like tablets and smartphones than desktop computers" (E1). The penetration of new technologies is completely changing the way messages are conveyed to the consumer and the way they relate. In this regard, the penetration of television will be widely overcome by digital media (E19, E22), particularly among the younger population who are more permeable to new technologies (E5) and who will also evolve the form and content of messages (E6). Such changes will also affect the use of media: they will become more individualized (E9) and a new ecosystem based on digitalization of content will appear (E3). Therefore, custom content, streaming video, mobile applications, social networks, among others (E24, E26), are replacing traditional media. In the particular case of Latin America, the Internet is reaching the least developed countries (E24), where government policies rest on the Internet as a tool for overcoming "extreme poverty and integrating the vulnerable population" (E30).

We can therefore observe how the possibilities for disseminating and receiving an advertising message are changing (E31). These messages are adapting to the new economic and technological reality (E32) involving multiple new ways of communicating. E6 elaborates on the technological advancement and digitization of many activities and indicates how the future sustainability factor may start to be very important: "the imbalance between population growth and the use of resources vs. resource regeneration or depletion of non-renewables. The generalization of this conviction could play a relevant role in rethinking the notions of quantity and quality of consumption" and, consequently, changing the advertising process.

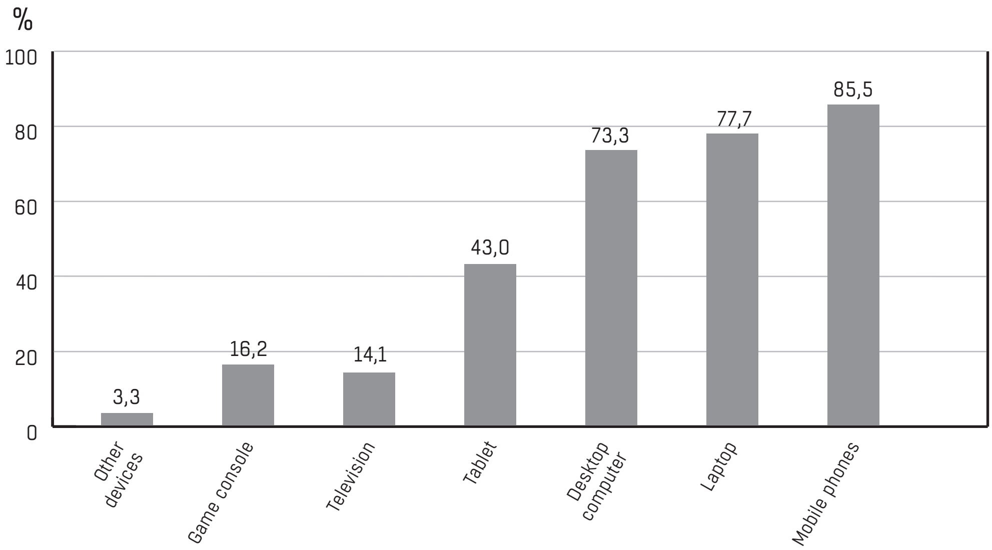
CHANGES IN THE MEDIA

This dimension refers to the major changes that are currently taking place in the new points of contact with the consumer, arising from interaction with mobile devices and social networks. In the opinion of most experts, the technological revolution, marketing 2.0 and, in particular, the expansion of social networks broaden possibilities for contacting the consumer, allowing the interaction of brands with customers. In this section, the responses of the surveyed professionals identify new factors driving these changes.

For E2 and E25, globalization, English as "the language of the world", along with mobile devices, smartphones and tablets, lead to a multichannel strategy. Although conventional television is still the primary media source in terms of advertising investment and its consumption continues to increase (E24), mobile marketing is now a reality and is gradually integrating into relations between consumers and brands. The consumer chooses the time and place to consume content, which is the opposite of what E10 calls "linear television" and is more consistent with "social TV", where viewers share their opinions through tools such as Twitter or Facebook while watching television (E32) or listening to the radio (E29).

According to the members of the panel, nowadays consumers are increasingly more skeptical (E14), more selective and possess more information (E33); they learn what interests them through blogs, corporate websites, specialized forums, and they compare prices before making any purchase. In a matter of minutes they have transformed into in ambassadors or detractors of brands according to their experience in the purchase and use of a particular product or service. Ultimately, "wanting to know more about a product" (E20) and the loss of confidence in advertising (E21) makes social networks "direct points of reference in making purchase

Chart 1. Devices used to access the Internet by Internet users in Spain. December 2013 (percentage of respondents)



Sample: 23,811 Internet users.

Source: Asociación para la Investigación de Medios de Comunicación (AIMC) (2014), p. 31.

decisions" (E22). These changes make it necessary to explore how brands should intervene in these social spaces, without such intervention being counterproductive for their interests (E29). Along the same lines, E32 states that "the direct persuasion model is in crisis and advertising must reinvent itself to reach out to the audience without raising its distrust".

The *Asociación para la Investigación de Medios de Comunicación* (Association for the Research of Communication Media) (AIMC, 2014) has just published a report stating that the Internet is central to the lives of Internet users. According to the survey carried out in the last quarter of 2013 in Spain, almost 85% said that they access the web several times a day (p. 26) using various devices such as mobile phones: more than 85% of respondents had used a mobile phone to connect to the Internet, and 43% did so using a tablet, while desktop computers and laptops were also regularly used (p. 31).

Accordingly, the growing use of the Internet is shifting contact with other media by individuals. They already spend more time surfing the Internet than watching television: reading news and watching video content are increasingly the main activities on the Internet. E5 speaks of digital hyperactivity to express how today consumers need to be active, carrying out several activities at the same time (E6) having virtually no leisure time (E7). This trend, they say, will continue to grow exponentially due in part to the penetration of mobile devices. "If the advent of desktop computers and the Internet was the first revolution, now there are countless possibilities with the mobile and its applications" (E27): its flexibility and ease to customize advertising messages; having become an essential element for users, 24 hours, 7 days a week, to the point of becoming a palimpsest (E28); the possibility of geo-location, its proximity and its immediacy, are making it the most important screen. Merely in Spain, for example, the growth of mobile marketing investment increased more than 60% in 2013, while the investment –in absolute terms– remains low in comparison to the rest of the media: while the penetration of smartphones continues to grow and operators provide access to the entire population through more affordable rates, the trend will remain bullish.

In this regard, the technology applied to the media is offering a solution to consumers' new communication needs, allowing the media to adapt more closely to personal and group demands (E28), within the framework of a phenomenon that this respondent calls "hyper-connection". From now on, the measurement and analysis of all these conversations between brands and consumers, and consumers themselves will be necessary: this requires a new boom of Customer Relationship Management, better known by its abbreviation CRM, which consists of a management model focused on customer orientation: big data (E25) and the emerging need to manage all information generated by individuals as a result of the transition to a digital society on the move have already been placed on the agenda (E17).

Even if a family is together in front of the TV, the attention is dispersed among multiple individual technological devices. The advertising and media paradigm is changing, steering away from "the massiveness that traditional media previously achieved" (E22), and new forms and communication platforms are appearing (E23) which show a trend towards individual consumption of content: 25 years have passed since on January 2, 1989, TVE broadcasted the contest show "*El precio justo*" (The Price is Right), reaching an audience share of 42.8%. Nowadays, only very occasional broadcasts, often sports, manage to attain a 20% share in Spain. The scenario, thus, appears hyper-fragmented, places in crisis "the idea of mass audiences" (E29) and once again "increases not only the difficulty of management, but the evaluation of effectiveness" (E25). This effectiveness –of advertising– is being questioned in the face of a new form of media consumption, either as a cross-platform where the individual does not distinguish between online and offline channels (E1), or as shared consumption, for example watching television and reading the press simultaneously (E2, E11). Conventional media that present greater limitations in terms of time and space (E6) have to give way to new technologies, which bring with them new media, new devices and formats (E18). Other surveyed experts believe that traditional communication continues to be the most effective, although they point out it must evolve and adapt to new consumers who are increasingly more restless, observant, critical, distrustful and demanding (E8, E20, E32). Statements like television continues to be the most effective in terms of getting coverage, visibility, "building brands and storytelling" (E10, E18) were expressed on more than one occasion by the panel. Indeed, the answers are full of nuances, but agree that communication channels have multiplied in the digital world (E18) and, therefore, their effectiveness has atomized, since audiences scatter their attention (E22). These nuances take shape when E2, E19 and E25 say that traditional media need to rely on the new media, and vice versa, and state some examples, such as the fact that e-commerce platforms need traditional media to generate traffic on their websites. For E16, this situation is part of a process "where today reading newspapers on a tablet is as common as doing so on paper was years ago".

The aim of communication also prevails when choosing one media outlet or another. For E18, traditional channels, for example, provide high levels of visibility, while their direct impact on the act of purchase is lower (E25). If what is sought is for the consumer to participate and interact (E23), then social media are the best (E32). E31 believes that a buyer gets information from multiple platforms of communication, "which is why Google has created the ZMOT theory", by which the user continuously seeks information, opinions, and product specifications before buying. Google defines the moment of online decision-making as the Zero Moment of Truth.

THE ROLE OF MEDIA AGENCIES

Without doubt, media and advertising are adapting and evolving, and should continue to do so (E8, E9) in order to keep drawing the attention of the consumer. The majority of respondents agree that the advertising agency must undergo a transformation in all areas: business model, work processes, structures and internal organization charts, as well as the profile and skills of professionals working there. Historically, comprehensive service agencies were required to deliver a global advertising service. Today it is common to work with specialists from the various areas: creativity (we even find creativity providers for offline media and others for online media), media planning and buying, content producers, design studios, social network marketing agencies, search engine optimization, mobile marketing, email marketing, events and sponsorship, among others. It is a situation which will awaken the need for a comprehensive, strategic vision of advertising, but with highly specialized solutions, in a race to lead the communication strategy by which brands come into contact with new consumers.

Not all agents involved in the advertising process are adapting at the same speed. Indeed, many will be left behind: advertising agencies and media agencies are rethinking their business model to adapt to this new media ecosystem (Martín-Guart & Fernández Cavia, 2012). What kind of advertising agency will be able to lead this profound transformation and become the main strategic partner for advertisers? For some respondents, media agencies are ready to lead this change; for others, creative advertising agencies and digital agencies are better placed. A range of opinions, but they agree that it is imperative to adapt to the new communicative equation by which the traditional paradigm of mass communication loses effectiveness (Kitchen, 2004; Arens & Schaefer, 2007; Vollmer & Precourt, 2008) and is being replaced –according to Cardoso (2011)– by online communication.

For E1, the dispersion of services between different types of agency "does not help to ensure proper coherence and consistency of the advertising message". And when asked specifically about the role that media agencies should exercise, most agree that if the model continues to be based on media volume, price and purchasing it will lose all purpose: "a simple purchase and sale broker does not provide added value" (E6). The new media agency should help the advertiser develop the best communication strategy to reach the target audience (E2, E4). It must become a marketing agency, involved in the advertisers' business, and should know how much to invest, in which channels (E9), be more familiar with the consumer and innovate (E22) to become a strategic partner. For others surveyed, however, at present this type of agency is basically a financial model (E11), aimed at achieving the best conditions for purchase and negotiation (E13, E20, E24).

Regardless of who will be the winner of this race, any agency that is capable of leading in negotiation and strategic management with brands must strongly venture for research (E18, E21) and provide high value-added services linked "to knowledge, information and their processing in a comprehensive manner" (E16). E20 also insists on the analytical and strategic research capacities of the new media agency and warns of the need for more and better tools. It is interesting to quote E9 when he says that "if marketing became split between an aspect of art and science, creative agencies held on to the art aspect while media agencies took over the science, and we know that science is constantly growing ".

According to E2, for media agencies it is vital to "reinvent themselves" and not to only improve their current services or expand them around their core business. High-impact differentiated formats, below the line activities, PR actions, retail agreements, content services (E6, E19), and being able to adapt the message according to the media (E26) are the new needs media agencies must address if they want to lead the new advertising process. E3 goes beyond the description of services around traditional media planning and states that the media agency must provide intelligence throughout the entire advertising process and "model the effectiveness of each medium". However, other views express that the media agency is not prepared or does not have the capacity to lead this change, and that digital agencies will be the protagonists. In line with these views, Lee (2012) asserts the reign of relationship marketing, in which it is more important to engage consumers in a conversation rather than impacting them with a message. This area identifies the communication actions that are important in the creation of value for the brands and where the role of the Internet in media planning is essential. This is also true for E23 when he says that "the empowerment that media give to the consumer nowadays, combined with the tendency for liquid information (accessible at all times and places almost without restriction) makes people increasingly aware and knowledgeable of brand communication processes, whereby they recognize the power they have and, as a result, they feel like active players in these processes". Conversations are digitalized and can be viralized. Brands can now listen to consumers and respond to their needs almost immediately, giving rise to new corporate, transactional and communication models focused on the social web and a la carte content (E5), and without losing sight –especially in times of economic, social and political crisis in which many countries are immersed– of the conversion processes (E6, E11): the advertiser wants to know "exactly who he reaches and how much he is paying for it" (E10).

CONCLUSIONS

TOWARD A CROSS-PLATFORM CONVERSION

A reality that has been captured in this article is that the current division of traditional media –such as television, the press, radio, the external media and the Internet– is moving towards a cross-platform conversion where the receiver takes on a secondary value and what gains importance is content. In the field of advertising, campaigns opt increasingly to use different offline and online channels to spread their message, otherwise coined as cross-media actions, a term that is often confused with transmedia, so it is worth making a conceptual distinction: while cross-media consists of telling the same story in different media, but without extending the narrative universe, transmedia assumes that the stories have independent meaning, but are part of a common extensive narrative universe (Sanchís, Maestro & Canós, 2014). The challenge is to develop a rich transmedia experience which excites consumers and encourages them to assist in developing the story (Scolari, 2013). In other words, the user participates and interacts with the content. It is a new way of watching television, for example, where the viewer shares a television program while actively participating in social networks: according to the study *The new multi-screen world: Understanding cross-platform consumer behavior* published by Ipsos in 2012, 81% of United States Internet users use the mobile phone while watching television.

It is clear, therefore, that we are in a time of change, that traditional marketing schemes are transforming (brands, consumers, media and technology are different) and that the Internet has greater weight in communication and knows no limits: the consumer can access audiovisual content on the move, at any time and in any place using smart TVs, computers, smartphones, tablets, e-books, game consoles, smart watches, etc. Through geo-location, screens encourage the Internet audience to continue to grow and ensure segmentation has no limits. Internet advertising activity corroborates this, with growth in Spain of 1.8% in 2013, a trend that seems to continue in 2014, while the fall in conventional media was 8% from 4.63 billion euros in 2012 to 4.261 in 2013.

THE MEDIA AGENCY IN THE FACE OF THE CHANGE OF THE MEDIA ECOSYSTEM

This new scenario requires advertising agencies to "reinvent themselves", offering new services and products and promoting innovation and creativity to draw the attention of a consumer who is more skeptical to advertising. In this regard, Corredor (2010) emphasizes that the digital revolution and the expansion of social networks is significantly affecting the advertising industry. And this process continues to become heightened year after year with the emergence of new social networks and the ease with which mobile access can be gained: Facebook is still the most widely used social network, with 1.155 billion active users per month worldwide. Twitter, LinkedIn, Google+, Instagram, Foursquare, YouTube and Pinterest, among others, also accompany users 24 hours a day wherever they are, allowing them to talk to friends and the brands they criticize, recommend, value, ask for information and even purchase. Consumers follow brands; those they feel a special interest for that is driven on many occasions by the offline media from which consumers are encouraged to follow a particular brand. Thenceforth, the advertiser will need to awaken and keep the interest of the follower, of the fan who will end up purchasing a specific product and recommending it. Therefore, new ways to plan an advertising campaign are emerging, with new points of contact with the consumer, derived from mobility, social interaction and interactivity: with this principle, a professional who currently works in the communication value chain must also change and –as stated by Martín-Guart & Fernández Cavia (2012)– the present and future of all stakeholders (agencies, advertisers, the media) is under review and cast under doubt; especially the present and future of media agencies, considering the large volume of advertising investment they manage, making them a strategic partner both for the media and major advertisers, such as Procter & Gamble, L'Oréal, Vodafone, Telefónica, Volkswagen, Danone, Reckitt Benckiser, Unilever, Nestlé, Nissan, Renault and many others that lead the rankings in terms of advertising investment in most of the analyzed countries. These major advertisers are also evolving at the same pace as technology and consumers, in an environment of concepts that has already left marketing 1 0, 2.0 and even 3.0 behind. Today we speak of marketing 4.0, in which prediction and the ability to anticipate trends is more important than research itself, since each brand must know what the customer needs before he needs it.

We are facing an increasingly complex ecosystem that requires new advertising and, in particular, media strategies: a possible future line of research emerges within this context which would focus on the relationship between advertisers and media agencies, and the skills and competencies professionals working there should possess.

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