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Analysis of communications consulting agencies in Spain: Professional profiles, structure and activity

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Abstracts
Introduction. The sector of corporate communication and PR is a branch of activity that is booming in the current business system. This article aims to describe the characteristics and services of the main communications consulting agencies that operate in Spain as well as to identify the professional profiles they require. **Methods.** The study is based on the review of the websites of a sample of communications consulting agencies and a survey applied to a sample of professionals working in this sector. **Results.** The data show that the sector of corporate communication and PR is growing with high specialisation and that it has a significant presence of women professionals in middle-management positions. Although communications consultants possess high qualifications, there is no homogeneous profile to characterise these professionals. **Conclusions.** The sector is undergoing a process of continuous evolution and requires highly trained professionals to develop specialised and specific services, especially in the digital area.

Keywords
Professional profile; consultancy; corporate communication; PR, journalism.

Contents

Translation by **CA Martínez-Arcos** (PhD in Communication, University of London)

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1. Introduction

Over the last two decades, Spanish researchers have addressed the performance and the evolution of PR and corporate communication from different perspectives (Arceo, 2004; Arceo-Vacas, 2003; Castillo, 2004; Costa, 2009, 2011; Matilla, 2010; Míguez and Baamonde 2011; Navarro *et al*., 2012; Noguero, 2004; Castillo and Xifra, 2006; Xifra, 2007; Villafañe, 2000; Navarro *et al*. 2012; Martín-Llaguno et al., 2015). However, introspective research **[1]** on the sector has not captured the attention of the academia. In Spain, for example, such studies have been led by the professional sector, which is in the hands of the main associations: the Association of Communication Directors (DIRCOM) and the PR and Communications Consultancies Associations (ADECEC) (Almansa, 2004a, 2004b; Estanyol and Lalueza, 2014; Gutiérrez-García, 2010). Both institutions produced the first research studies on the subject, which initially aimed to evaluate the status of the profession (Almansa, 2004a, 2004b; Estanyol and Lalueza, 2014; García, 2011 and Gutiérrez and Rodríguez, 2010). These works inspired many other studies developed by academics (Arceo, 2012; Morales and Enrique 2007; Matilla and Marca, 2011; Mut, 2011, 2013; Miquel-Segarra, 2016). However, and despite the efforts made to date, the sector has rarely been analysed according to the location of its professionals in internal departments or external consulting agencies.

The same situation has been confirmed at the international level: academic research has not paid attention to the area. Although there are authors of reference with works of great scientific interest (Seitel, 1995; Grunig *et al*., 2002; Cutlip *et al*., 2006), only few of the recent studies have analysed the organisational structure of consulting agencies (Wilcox *et al*., 2012; Frandsen *et al*. 2013). This is also the case of the studies carried out by professional associations (ICCO, PRCA, IPR & PRSA, Euprera & EACD, and Euprera & DIRCOM), which address with more details the status and trends of the sector at the international level.

Focusing on the Spanish case and particularly on the field of consultancy, ADECEC is the only institution that has carried out studies focused on providing a global view of the sector. The aim of these studies (ADECEC, 2002, 2004 and 2008) is to identify the most in-demand communication activities among organisations and describe the situation of communication consultancies with respect to the demand of PR services. However, these studies have become obsolete and only reflect the abrupt change that has occurred in the past decade with the emergence of the Internet and the new paradigm focused on the possibility of two-way communication.

In this last period the professional environment, and more specifically communications consultancy, has once again become the protagonist in this type of research. Thus, there are companies like Evercom, Llorente y Cuenca, Grupo Consultores, Torres y Carrera and Atrevia which have produced regular reports on the state and trends of the sector.

For its part, the academia has only produced few research for this purpose (Noguero, 1990; Villafañe, 1999; Arceo Vacas, 1999 and 2003; Huertas and Cavia, 2006; García, 2011; Castillo and Ruiz, 2012; Lalueza, 2010, 2011, 2012; Estanyol-Casals and Lalueza-Bosch 2014; and Miquel-Segarra, 2016). This lack of studies is striking considering that one of the demands of the university reform of the Bologna Process is to bring university studies closer to the professional practice (Ministry of Education of Spain, 2006) and, in addition, because various studies have shown the gap between the training provided and the needs of the job market. In the case of PR and corporate communication, this estrangement is increased by the young age of the discipline and the speed of the changes taking place in this area, largely motivated by the emergence of technological and digital.

1.1. The sector of communications consultancy in Spain

The origin of the main PR consulting firms and of the current multinational sector date back to the United States in the 1970s (Arceo, 2006; Xifra, 2010) when these firms began to spread, first, in Anglo-Saxon countries and then in the rest of Europe. This is also the case of Spain (Almansa, 2011; Barquero, 2005; Castillo, 2009; Noguero, 1994, 1995, 2004; and Xifra, 2010) where a decade later the crisis that hit the advertising industry favoured the emergence of "other processes of communication applied with a clear tendency to transmit business identity attributes to increasingly fragmented audiences grouped around much more intangible values" (Villafañe, 1999: 220). In this context, the image of the company "not only begins to be re-valued but also becomes, in many cases, the main objective of its communication" (Villafañe, 1999: 223). So, from this moment on corporate communication becomes consolidated to respond to the needs posed by the integrated view of communication management, based on intangible assets such as brand, visibility, image and corporate reputation (DIRCOM, 2015).

This shift favours the emergence of PR and communication departments and consultancies. The business and institutional sectors demand the incorporation of internal or external professionals (agencies or consultancies) to manage the communication of their companies. As discussed above, in this decade there was a proliferation of communication companies and consultancies, and even the first incursions of international PR agencies in Spain (Gutiérrez and Rodríguez, 2009), as it is the case of Burston and Marsteller, inaugurated in 1982.

Along with the boom of the sector, associationism emerged a decade later (1990s): the Spanish Association of PR and Communication Consulting Companies (ADECEC) was founded in 1991, and the Association of Communication Directors (ADCDIRCOM) was launched one year later, in 1992.

In the first decade of the 21st century communication agencies suffered another important change: as a result of market needs and the trend to divide their activity, they became specialise in different areas: economy, technology, health, luxury, fashion, internal communication, consumption, crisis management, public affairs, etc. (Paniagua, 2010).

The communication needs of companies, caused by the impact acquired by intangible assets, provoked the proliferation and consolidation of communication departments at the centre of organisations (Moreno et al., 2011, 2012; Navarro et al., 2012). Currently, nine of every ten large Spanish companies have an integrated department in charge of managing communications and branding (DIRCOM, 2015). The dimension and characteristics of these departments depend on several factors: the type of organisation, its size, business objectives and even the sector to which they belong.

Their most important agent, the communications director, manages the company's global communication (Morales and Enrique, 2007), with an especially important role in the definition of strategies and the management of intangible assets (DIRCOM, 2010). This integrated department directly depends on the highest management level of the company (DIRCOM, 2015) and offers advantages and disadvantages that must be taken into account when assessing the need to implement (or expand) communications management through an external manager. One of the most significant disadvantage may be the lack of specific preparation of the internal team for certain issues or the emergence of unforeseen situations that require additional resources. In addition, the routine, the underestimation of the internal views and the lesser independence when analysing a specific situation can become a problem (Castillo, 2010).

Faced with this situation big companies, in addition to having their own communications department to manage, plan and execute routines, also have the support of consultancies and agencies for more specific situations (ADECEC, 2008; Grupo Consultores, 2013). In fact, in Spain, as reflect in introspective studies (Torres y Carrera, 2013, 2015, Prnoticias and Torres Carrera, 2017) increasingly more companies work with consultancies, who come to be seen by clients as important strategic partners (DIRCOM, 2015; Miquel-Segarra, 2016).

1.2. Description and size of the communications consultancy sector in Spain

Given the lack of conceptual delimitation in the field of corporate communications and PR (DIRCOM, 2000, 2010, 2015: Miquel-Segarra and Martín-Llaguno, 2015), different terms are often used to refer to the services offered by companies that share similar characteristics. Thus, “companies that provide communication services, in an independent and external manner, to third parties (mostly to companies and institutions, but also governments and individuals) are self-defined as agencies, consultancies or advisers in communication and/or public relations” (Estanyol and Lalueza, 2014: 139).

However, there is a general tendency to use the terms “consultancy” or “consultant” to refer to their implied strategic role in relation to the most tactical aspect of the “agency”. Similarly, in these self-denominations the term “communication” is taking strength over the term “public relations” (Armendáriz, 2015, Estanyol and Lalueza, 2014).

Moreover, in the international academic arena some authors advocate for the use of the term consulting company or consultancy (*consultora*) to the detriment of the term “agency”, arguing the need to differentiate these companies from the press office model (Grunig and Hunt, 1984) and advertising agencies (Jefkins, 1993; Wilcox *et al*., 2012).

That is why it is also very difficult to draw an accurate map of the communication consulting companies operating in Spain. The sector is very heterogeneous and the companies that form it vary greatly in terms of philosophy and size, as well as legal personality (Matilla, 2007; Molina-Cañabate, 2008; Wilcox *et al*. 2012) and type of clients and services (Matilla, 2007).

However, according to the National Classification of Economic Activities (CNAE) and its “sectorial Ranking of PR and communication companies” **[2]** (Sector NACE: 7021), developed by *El Economista*, in Spain there are currently 516 companies dedicated to the sector of communication and PR.

Despite these data, many consultancies operating in Spain are part of communications holdings or large media groups that also integrate advertising agencies and media centres and, occasionally, are identified with the code CNAE 7311 (advertising agencies), as it is the case of some consultancies that belong to groups such as WPP, Interpublic, Publicis and OmnicomGroup.

Another aspect that should be noted on the current scene is the existence of companies that only have one or two people in their workforce. They call themselves “communication consultancies” (Arceo Vacas, 2004: 40). As it can be assumed, these companies do not always appear in the National Classification of Economic Activities and, therefore, are not taken into account in the overall figures of the sector.

Another interesting source that contradicts the National Classification of Economic Activities is the report titled “The PR sector in Spain. Economic analysis”, which has been produced by *Puesto Base* (2013). This report indicates that in Spain there are more than 1,000 very diverse companies dedicated to corporate communication and PR.

Thus, despite the business reality of communication and PR consultancies has not been fully documented, the National Statistics Institute of Spain shows that after a short period of decline, there is a significant recovery in the PR sector. Recent reports reveal that the sector has increased its revenue by 67% over the year 2013 (Prnoticias and Torres-Carrera, 2017). These data reflect the boom of the communications field.

1.3. The academic profile of the communications consultant

After the Declaration of the Bologna Process **[3]** (19 June 1999), the National Agency for Quality Assessment and Accreditation of Spain published a White Paper (ANECA, 2005) that outlines the desirable competencies to exercise the profession of PR. It should be noted that, according to the Spanish tradition of associating academically both disciplines of communication, these competencies correspond to the degree in Advertising and PR.

This document also notes the difference between the different professional profiles within the field of communication and the need to delineate their functions since, although all of them (journalism, advertising and PR professionals) are social communicators, “not all of them do the same things nor share identical communicative functions (which may be similar but not the same), and therefore also require specific and correctly differentiated academic training” (ANECA, 2005:190).

In this way, the undergraduate degree in Advertising and PR aims to educate students for the professional practice in four basic profiles (Communication director, researcher and strategic consultant in advertising and PR; media researchers, planners and buyers; creative and designer; and corporate communication manager (ANECA, 2005: 34). One of these profiles fits perfectly with the object of study of this article: Communications director, researcher and strategy consultant in advertising and PR: “professionals who exercise their activities in the scope of the company, the advertising or PR agency, or the consulting firm” (ANECA, 2005: 33).

However, in the professional reality the activity in the field of corporate communications and PR is mostly performed by journalists (DIRCOM, 2015; and Martín-Llaguno et al., 2015), and at the same time, there is an upward trend that shows that the journalistic profession is also migrating towards business communication (APM, 2015, 2016). Therefore, it is interesting to see and review the professional profile that, although diffuse and general, the ANECA white paper assigns to journalists: the “specialist in research and analysis of communication phenomena and processes for all types of public and private organisations, trained for the tasks of consultations, consultancy and mediation” (ANECA, 2005: 191).

While the purpose of the renewal of the education system is to improve the quality of learning and, therefore, the approach of undergraduate studies to the professional practice (Ministry of Education, 2006), academic professionals and educational institutions continue highlighting the need to adapt and implement a specific higher education that outlines in depth and professionalises PR and communications management (Moreno, Carrasco and Saperas, 2014). In this line, many Spanish authors have examined the curricula of communication degrees (Castillo and Xifra, 2006; Magallón, 2004; Matilla *et al.*, 2010; Matilla and Hernández, 2010, 2011, 2012, 2013; Hellín and García, 2011; Moreno et al., 2014; Perlado and Saavedra, 2017; and Xifra, 2007), which demonstrate the lack of adaptation to the demands of the job market and the professional reality. At the same time, they question the validity of the ANECA white paper (2005) since it does not address the emergence of new environments, new actors, new roles and even new names and responsibilities arising from the developments that the profession has experienced in recent years (Perlado and Saavedra, 2017).

Based on the previous situation, this research aims to further the knowledge of corporate communications and PR consultancy and professionals. The importance of this objective lies in the growing relevance of the sector in the economic scale and the huge impact it has acquired in the business, social and political fields. And, despite this, consultancies are still a professional alternative barely valued by students and future professionals.

So, this research tries to identify and describe the main features and services offered by the major communication agencies and consultancies to characterise a field and a professional profile that has been hardly analysed by scholars. The objective is to provide relevant information for the adaptation of education to the professional reality.

Thus, this study aims to answer the following research questions:

1) What is the profile of those professionals working in consulting firms operating in Spain?

2) What is the structure and staff of consulting firms operating in Spain?

3) What types of services are offered by consulting firms and which sectors are they targeting?

4) How is the online communication of these consulting firms?

2. Methods

To achieve these research objectives, we have carried out an empirical study based on the use of two techniques:

1) A survey applied in 2014 to investigate the working environment of professionals who are affiliated to DIRCOM and work for communication and PR consultancies in Spain.
2) Content analysis of the websites of the major communication and PR agencies and consultancies that operate in Spain.

2.1. Survey to professionals

2.1.1. Participants

In 2014 we carried out a research to examine the work of corporate communication professionals in Spain (Miquel-Segarra, 2016). This study was conducted with the collaboration of DIRCOM and the COSOCO research group of the University of Alicante.

Our population (communications consultancies in Spain) has been identified with the data obtained in this research. Thus, in May 2014, DIRCOM invited via email all of its members to participate in the survey through the completion of an attached questionnaire. The survey was also advertised on the cover of DIRCOM's weekly bulletin (http://www.DIRCOM.org). Later, between June and July DIRCOM members were contacted through its LinkedIn group, with direct and personalised messages. A total of 190 members (21.9% of 866) answered the survey.

This research uses a sample of 79 professionals who are affiliated to DIRCOM and work or had worked in communication consultancies/ agencies. 58.2% of the participants are men and 41.8% are women. In terms of their geographical origin, 54.4% were from the community of Madrid, 16.5 from Valencia, 15.2% from Catalonia and 13.9% from other autonomous communities. The representativeness of the sample is limited, as is a convenience non-probabilistic sample.

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2.1.2. Instrument

For this study we designed a comprehensive self-administered online questionnaire and later selected the items relating to professionals' demographic data, education, working environment and organisational culture of their employers. This last section, which analyses whether the sector is family-responsible, was measured through the validated scale developed by Thompson, Lyness and Beauvais (1999).

2.1.3. Analysis of data

A descriptive analysis was performed to examine the profile of consulting professionals. Moreover, Student's t-distribution test was performed on independent samples to determine whether there are significant differences according to the gender of the participants in the perception of the organisational culture of their company. The significance value set for this study is < .05. The analysis has been performed with SPSS version 20.0.

2.2. Content analysis of websites

2.2.1. Sample

To identify the main agencies and consultancies that are operating in Spain we used the ranking of companies in this sector based on their revenue in 2015, which was prepared by the consulting firm *Torres y Carrera*. This report was prepared with data obtained from the public registry of commerce through its *e-informa* platform. The information obtained from companies corresponds to the latest year ends (2015). The report is complemented by a comprehensive analysis of the sector based on data from the National Statistics Institute of Spain (INE) (PrNoticias and Torres-Carrera, 2017).

The initial sample was composed of the 30 companies considered in the aforementioned ranking (Table 1).

Table 1. Agencies and consultancies included in the sample

	Company	Website
1	Llorente y Cuenca	http://www.llorenteycuenca.com
2	Atrevia	http://atrevia.com
3	BursonMarsteller	http://www.burson-marsteller.es
4	Estudio de Comunicación	http://www.estudiodecomunicacion.com/extranet
5	Apple Tree	http://appletreecommunications.com
6	Ketchum	https://www.ketchum.com/es/madrid-0
7	Globally	http://www.globally.es
8	Kreab	http://www.kreab.com/madrid/es
9	Equipo Singular	http://www.equiposingular.es/es
10	TinkleConsultancies	https://www.tinkle.es
11	Edelman	http://edelman.es
12	Marco de Comunicación	http://www.marcodecomunicacion.com
13	Weber Sandwick	http://webershandwick.es
14	PorterNoveli	https://www.porternovelli.com
15	OgilvyPublicRelations	http://www.ogilvy.es/agencia/ogilvy-public-relations

16	InterbrandBranding	http://interbrand.com
17	Roman y Asociados	http://romanyasociados.es
18	Note Bene	http://notabene.es
19	Coonic	http://www.coonic.com
20	Hill & Knolton	http://www.hkstrategies.com/spain/es
21	Evercom	https://www.evercom.es
22	Ogilvy & Matter Pub Barcelona	
23	Neolabels	http://www.neolabels.com
24	Planner Media	http://www.plannermedia.com
25	ACH Cambre	http://www.achcambre.es
26	Torres y Carrera	https://torresycarrera.com
27	Ulled & Asociados	http://www.ulled.com/default.aspx
28	Asesores PR & Comunicación	http://www.comunicacionrrpp.com
29	Berbés y Asociados	http://www.berbes.com
30	Solsona Comunicación	http://www.solsonacomunicacion.com

Source: Report Prnoticias and Torres-Carrera, 2017

The final sample included 29 companies and excluded Ogilvy & Matter Pub Barcelona because in most aspects under study it refers to its parent company, Ogilvy Public Relations, which already forms part of the sample.

The analysis was carried out between April and September 2017 and was limited to the information available on their websites at the time of access.

2.2. Instrument

Data collection was performed with a purpose-created analysis table that collected the information extracted from the websites regarding the following areas:

1) Company’s general data: name, website, origin, foundation year and headquarters in Spain.
2) Workforce: quantification and composition according to gender.
3) Company’s areas of expertise, target sectors and services provided.
4) Web communication: geographical customisation, language and social networks.

Moreover, to complement the information of consultancies we also collected some economic data from the report published by Prnoticias and Torres-Carreras (2017) (revenue in 2015, variation of the 2014-15 revenue and revenue/workforce 2015).

Moreover, the coding of the areas of specialisation, sectors and services were performed based on the introspective studies carried out in recent years by consulting firms (Evercom, 2017; Grupo Consultores, 2013, 2015, and 2017) and the main associations of the sector (ADECEC, 2002, 2004, 2008; and DIRCOM, 2005, 2010 and 2015). After the analysis we extracted the relevant categories for the study (Table 2).

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Table 2. Coding categories for companies' areas, sectors and services

Specialisation areas	Sectors	Services
• Brands • People • Corporate communication • Crisis communication • Financial communication • Reputation and CSR • Internal communication • Public Affairs and institutional relations • Online communication • Product communication	• Health • Technology • Public administration • Automotive • Education • Food • Financial services • Mass consumption & distribution • Energy • Mining • ICT • Professional services • Infrastructure, transport and logistics • Textile • Sports • Beauty • Entertainment • Art and culture • Home • Telecommunications	• Legislative tracking • Institutional relations / press office • Strategic communication • Event planning • Content creation • Marketing • Sponsorship • Social Media • Digital Marketing • Internal communication • Spokespersons training • Positioning of management team • CSR management • Crisis communication • Financial communication • Reputation • Public Affairs • Lobby • e-commerce • Mobile app development • Transmedia communication • Brand communication • Metrics, monitoring and diagnosis

Source: Authors' own creation

2.2.3. Analysis of data

The exploitation of data consisted of a descriptive analysis of the companies. Student's t-distribution test was performed on independent samples to determine whether there are significant differences between groups according to the companies' country of origin. The significance value set for the analysis was < .05. The analysis was performed with SPSS version 20.0.

3. Results

3.1. The professional profile

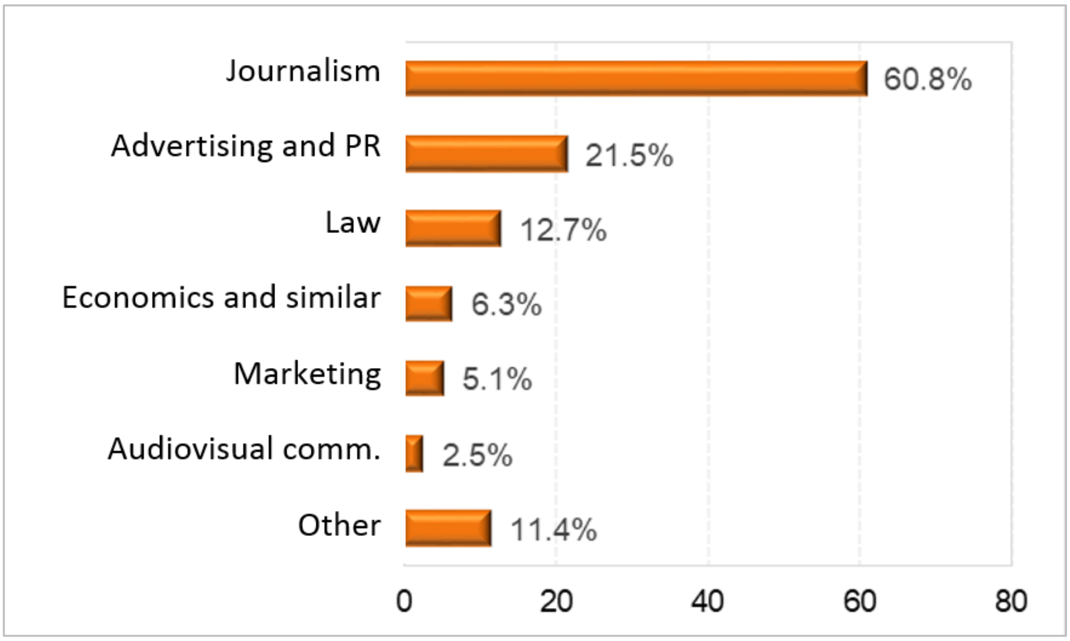
The participants working in the consulting firms are young people (2.5% of them are under 30 years of age and 97.5% have between 30 and 40 years of age), most live as a couple (69.6% are married or living as couple, 17.7% are separated or divorced, 11.4% are single and 1.3% are widowers) and have children (67.1%).

In terms of their education, they all come from the social sciences and a large percentage of them hold degrees in journalism (60.8%) (Figure 1).

In addition, participants tend to have postgraduate studies (49.4% hold master's degrees and 15.2% hold PhD degrees). In particular, they mostly hold BA degrees in communication (41.8%), marketing and sales management (11.4%), new technologies and social networks (8.9%) and business administration (7.6%). Moreover, 15.2% of respondents have completed several post-graduate programmes.

96.2% of participants complemented their degree with other types of qualifications: 87.3% has studied in information technologies, 70.9% has studied recycling or professional specialisation, and 63.3% has studied languages.

Figure 1. Academic qualifications of participants



Source: Authors' own creation

Regarding their working conditions, respondents who were working in a communications agency or consultancy at the time of the interview (54.4% of respondents) noted the following:

- 81.4% occupied a high position in the company, 16.3% an intermediate position, and 2.3% a low position. The comparison across gender groups indicates that 77.3% of women occupied a high category, 18.2% an intermediate position and 4.5% a low position. Meanwhile, 85.7% of men occupied a high position and 14.3% an intermediate position.
- The average number of weekly working hours was 49.12 (*SD* = 8.25).
- 62.8% perceived a variable remuneration; for 30.2% the remuneration depended on objective-based bonus and for 27.9% it depended on revenue-based incentives. In addition, 48.8% also perceived non-cash remuneration (phone, parking bonus, car, insurance, pension plans etc.).
- Respondents indicate that the culture existing in their companies was family-sensitive: the scores of respondents in the three studied factors of organisational culture show that they value their company favourably in this regard (table 2)

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Statistical analyses show that the differences in the assessment of work-life balance in their company between men and women are not statistically significant.

In terms of professional career, 8.9% has worked exclusively on communication consultancies, while 91.1% has also worked in other areas (notably, 67.1% has worked in communication departments, 39.2% in the media, 13.9% in marketing departments, 8.9% in advertising agencies, 2.5% in commercial departments, 2.5% in advertising departments, 1.3% in HR departments and 5.1% in other departments).

Table 2. Participants' ranking of their company's organisational culture (on a six-point scale)

	Total *M* (*SD*)	Men *M* (*SD*)	Women *M* (*SD*)
Managers' support of employees' family responsibilities	4.23 (1.16).	4.21 (1.24).	4.25 (1.13).
Company's time demands from employees	2.67 (1.27).	2.29 (1.08).	2.95 (1.36).
Negative effects of time spent in personal life on professional promotion	2.51 (1.26).	2.14 (1.28).	2.78 (1.21).

Source: Authors' own creation. Note: *M*=mean; *SD*=standard deviation.

3.2. The communications consulting agencies

55.2% of the major consulting firms currently operating in Spain are native. Only 24.1% come from the USA and 10.2% from other EU countries. The analysis of companies' age indicates that in other countries consulting firms have a long history in the market (all foreign agencies were founded between 1923 and 1974). However, as mentioned, in Spain such enterprises began to operate between 1980 and 1990, a period in which most foreign consulting firms opened offices in Spain (Table 3).

Table 3. Age of the sample of Communications Consultancies

	Foreign consultancies		Foundation of Spanish consultancies
	Foundation	In Spain	
1923-1940	2	0	0
1941-1960	3	0	0
1961-1980	4	1	1
1981-2000	0	6	12
2001-2017	0	1	3

Source: Authors' own creation

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With respect to the geographical location, all consultancies have headquarters in Madrid and 51.7% in Barcelona. In the rest of Spanish cities, the presence of consultancies is small (10.3% in Valencia, 6.9% in Bilbao and Malaga; and 3.4% in A Coruña, Seville, Valladolid and Vigo).

The analysis of the composition of the work teams that make up the structures of the consultancies indicates that the presidency is a one-man position in 75% of cases. However, in 20.8% of the consultancies the presidency is shared by two persons and in 4.2% it is shared by three people.

Women are present in the presidency in 33.3% of cases and, specifically, in a management position shared with a man in 12.5% of cases. This position is often a reflection of continued dedication to the same company, since in 41.6% companies the presidency is occupied by founding employees.

The analysis of the websites of consultancies indicates that 44.8% companies disclose the names of the mangers, executives and partners. Of those offering information on this aspect, 87.5% present the management team, 50% the partners and 37.5% the executive team. Of the workers occupying high-management positions, 65.6% are women, in average. In addition, although the presence of women is greater in Spanish companies (*mean* = 67.5%) than in foreign companies (*mean* = 57.2%), the differences are small and are not statistically significant.

In terms of the number of members that make up the senior management team of consultancies, it is made up, in average, by 32.56 people, although the size varies across the sample of companies (Table 4).

Table 4. Size of the senior management team

Number	%
From 1 to 10	18.8
From 11 to 20	31.2
From 21 to 50	18.8
From 51 to 71	31.2

Source: Prnoticias and Torres-Carrera (2017)

In the analysis of the activity of consultancies, the first aspect that has been studied is the areas of specialisation of the services provided. Among those companies that specify this issue, the most recurrent areas are those relating to services to people (84.6%), public affairs and institutional relations (69.2%), online communication (53.8%) and financial communication (53.8%) (Figure 2).

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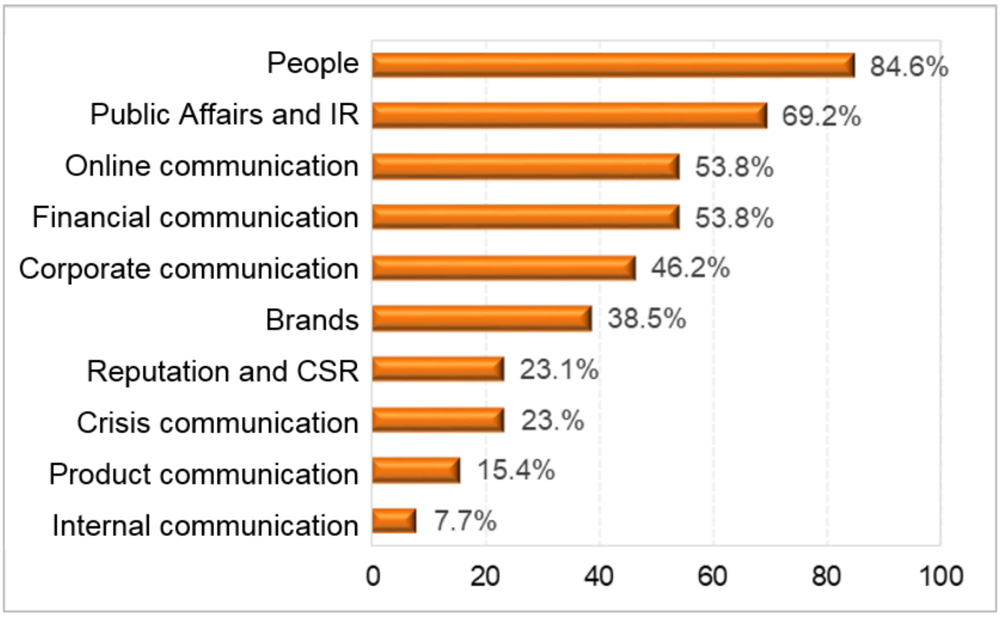
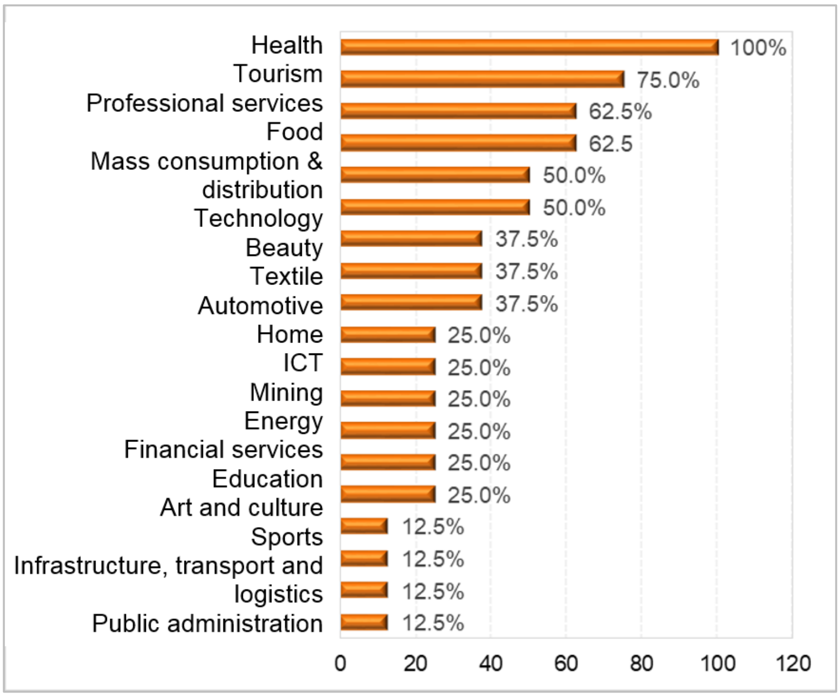
Figure 2. Areas of specialisation of the services offered by consultancies



Source: Authors' own creation

Only 27.6% of the websites specify the sectors in which they specialise. Of them, all indicate that they specialise in the health sector and tourism (75%). On the other hand, art and culture, sports, public administrations and infrastructures, transport and logistics are the sectors in which consultancies specialise the least; only 12.5% of the companies that share this information specialise in these sectors (Figure 3).

Figure 3. Sectors for which consultancies work



Source: Authors' own creation

13.8% of the websites do not specify the services offered by consultancies, but almost all of the remaining agencies offer their clients strategic communication management (92%), content creation (84%), digital marketing (84%), and institutional relations and press office (80%).

On the other hand, the services provided the least by consultancies include mobile app development (8%), transmedia communication (4%), e-commerce (4%) and positioning of management team (4%) (Table 5).

Table 5. Services provided by consultancies

Most common services		Least common services	
Service	Providers	Service	Providers
Strategic communication	92%	Metrics, monitoring and diagnosis	28%
Content creation	84%	Sponsorship	24%
Digital marketing	84%	Lobbying	20%
International relations, press office	80%	Legislative tracking	20%
Internal communication	72%	Mobile app development	8%
Spokespersons training	72%	Transmedia communication	4%
Event planning	72%	E-commerce	4%
Crisis communication	64%	Management team positioning	4%
Social media	56%		
Brand communication	52%		
Public affairs	52%		
Marketing	48%		
Reputation	48%		
Financial communication	44%		
CSR	40%		

Source: Authors' own creation

In conclusion, consultancies provide an average of 10.72 different services. Foreign entities provide more services (12.29) than Spanish companies (10.38), but this difference is not statistically significant.

The economic size of firms was also analysed to reflect the reality of the sector in Spain. By 2015, the consultancies had a revenue of €157,224,756.00; an average of €5,421,543.31 per company and of €112,822.10 per employee.

In this regard, it should be noted that there are significant differences in the economic size (revenue) of the main Spanish consulting firms. In particular, two Spanish entities had the highest revenue (6.9% of the study), had a consolidated record in the market (more than 20 years of experience) and concentrated 18.8% of the total revenue of consultancies (€29,603,778.00). However, the bulk of the revenue is obtained by consultancies with a medium economic size in our study: 41.4% of the companies in the sector (table 6) **[4]**.

Table 6. Economic size of consultancies in 2015

	Consultancies		Revenue 2015	
	n	%	€	%
1.5 to 5 million €	15	51.7	47,487,409	30.2
5 to 10 million €	12	41.4	80,133,569	51.0
More than 10 million €	2	6.9	29,603,778	18.8
TOTAL	29	100	157,224,756	100

Source: Prnoticias and Torres-Carreras (2017)

Comparing the total revenue obtained by consultancies in 2015 and 2014 we can observe an increase of 10.5%, in the global revenue, although variation has been uneven (table 2):

Table 2. Revenue growth of consultancies from 2014 to 2015

Consultancies with reduced revenue	Consultancies with revenue growth below 10.5%	Consultancies with revenue growth above 10.5%
n = 10 consultancies (34.5%)	*n* = 6 consultancies (20.7%)	*n* = 13 consultancies (44.8%)
Average revenue reduction = 5.3%	Average revenue increase = 5.3%	Average revenue increase = 36.7%
▪ Ketchum ▪ Planner Media ▪ Neolabels ▪ BursonMarsteller ▪ Asesores PR & Comunicación ▪ Solsona Comunicación ▪ InterbrandBranding ▪ Equipo Singular ▪ TinkleConsultancies ▪ Berbes y asociados	▪ Weber Sandwick ▪ Atrevia ▪ Edelman ▪ Coonic ▪ Ulled&asociados ▪ Hill &Knolton	▪ Globally ▪ Apple Tree ▪ Estudio de Comunicación ▪ Llorente y Cuenca ▪ Torres y Carrera ▪ Evercom ▪ OgilvyPublicRelations ▪ Roman y Asociados ▪ Marco de Comunicación ▪ Note Bene ▪ Kreab ▪ ACH Cambre ▪ PorterNoveli

Source: Authors' own creation with data of Prnoticias and Torres-Carrera (2017)

The analysis of the relation between the companies' economic size, 2014-2015 revenue growth and revenue/employee ratio, indicates that medium-sized companies saw the highest revenue growth (21.7%) and revenue per employee ratio (€122,375) (table 7).

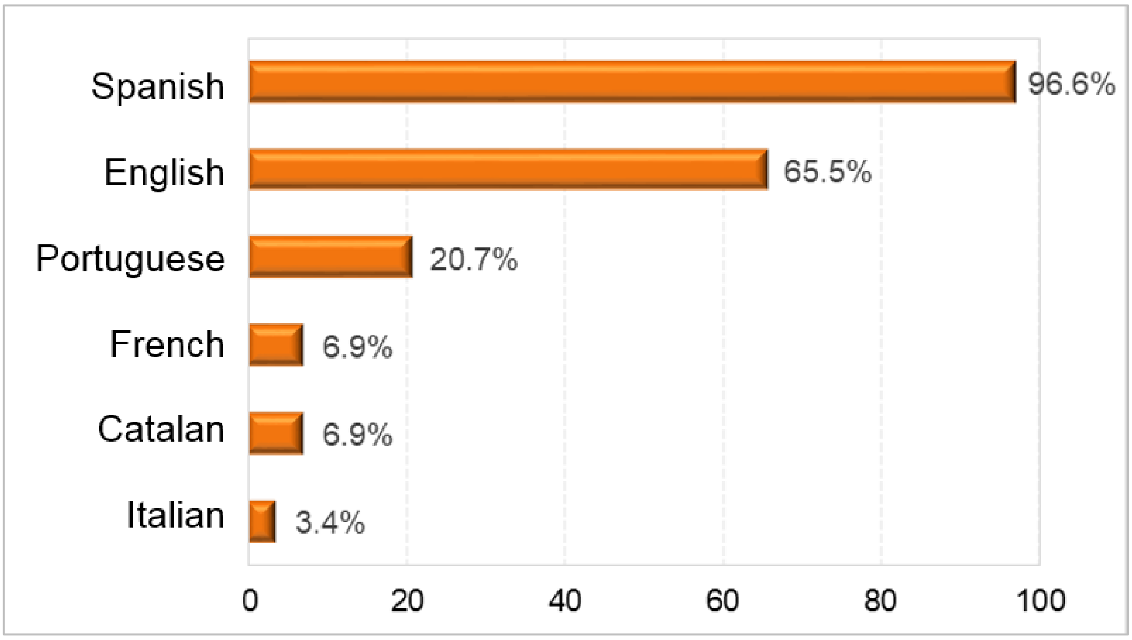
Table 7. Revenue behaviour according to economic size of consultancies

	Economic size (revenue)		
	1.5 to 5 million €	5 to 10 million €	Above 10 million €
Δ average revenue 2015-14	11.6%	21.7%	10.8%
Revenue/employee	€106,500	€122,375	€102,925

Source: Authors' own creation with data of Prnoticias and Torres-Carrera (2017)

The in-depth analysis of the websites of consultancies shows that 62.1% of them provide content in multiple languages. To be precise, 34.5% offer two languages, 20.7% offer three, 3.4% offer four and 3.4% offer five. The most common languages are Spanish (in 96.6% of the websites), English (65.5%) and Portuguese (20.7%) (Figure 4).

Figure 4. Languages used on consultancies' websites



Source: Authors' own creation

It should be noted that the websites of Burson & Masteller and Estudio de Comunicación distinguish between Brazilian (BR) and Portuguese (PT) languages.

An American consultancy, Interbrand Branding, only offers content in English. In addition, 80% of foreign-based consultancies have developed a website for Spain.

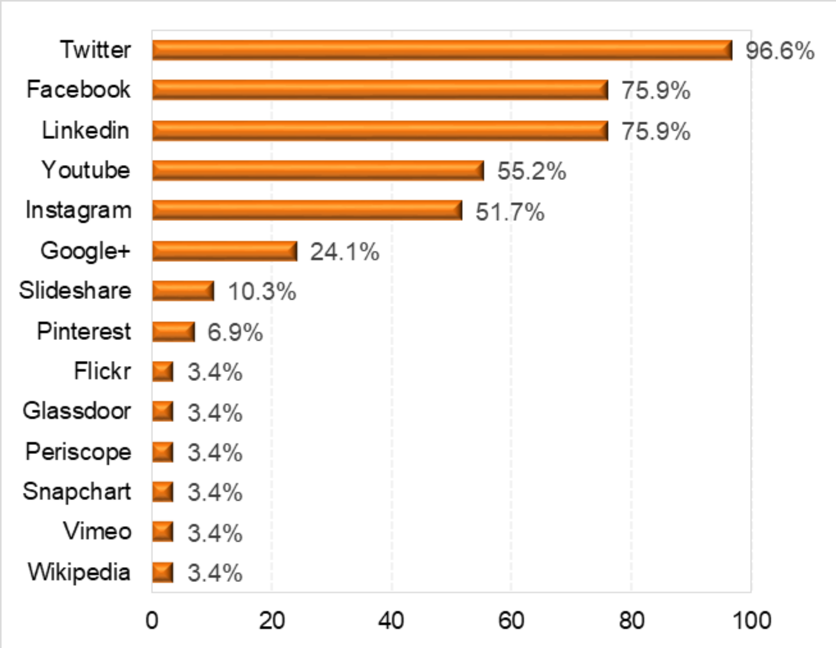
Regarding the use of social media as a communication channel, websites offer on average 4.17 links to social networks. The most common are Twitter (96.6%), Facebook (75.9%), LinkedIn (75.9%), YouTube (55.2%), Instagram (51.7%) and Google+ (24.1%) (Figure 5).

The analysis of the companies that use the largest number of social networks shows that only 13.8% use seven networks, 24.1% between five and six, and 44.8% between three and four. In cases in which the companies only use two options (13.8%), Facebook is always one of them.

An outstanding case is Coonic, a Spanish company of small economic size that does not include links to any social network on its website. This is particularly relevant if we consider that its range of services include all digital services: online communication, social media, digital marketing, e-commerce services and mobile app development.

The least used social networks (Wikipedia, Glassdoor, Periscope and Snapchat) belong to the profiles of the consulting firms that use the largest number of social networks (Llorente and Cuenca, Ketchum, Globally and Neolabels).

Figure 6. Social networks used by consultancies



Source: Authors' own creation

Among the social networks that revolve around video YouTube stands out, in 55.2% of cases, while Vimeo, Snapchat or Periscope have a very small presence (3.4%).

4. Conclusions

The data obtained in this research show that professionals working in communications consultancies have distinctive personal characteristics that are similar to those of the communications director (DIRCOM, 2015; Martín-Llaguno et al, 2015), they are young and highly qualified. It seems that their professional career develops in departments and the media and that this experience is complemented with postgraduate education in communication, ICT and languages. It would be interesting to examine whether the high percentages of complementary education are a consequence of deficiencies in the university system and/or the continuous change experienced by the communications sector, due mainly to the digitisation phenomenon.

On the other hand, the workforce of consultancies is composed mainly by women, reaching two-thirds of the senior management. However, as it occurs with communications directors (Martín-Llaguno et al., 2015) and in other sectors such as advertising (García-González and Otero-Piñeiro, 2011; Martín-Llaguno *et al.* 2007), there is also vertical segregation, i.e., an uneven presence of men and women in the corporate hierarchy.

Based on participants' employment point of view, they also differ substantially from other areas of communication such as advertising (Martín-Llaguno et. al., 2007). Although the consultancy sector requires a lot of dedication, professionals in this sector also enjoy the perks of belonging to a high occupational category (company car, pension plans, etc.) and consider that the corporate culture in their organisations is family-sensitive. It is therefore interesting to analyse in depth the causes and consequences behind these markedly positive features with respect to other areas of activity.

With respect to the academic profile, both the communication directors (DIRCOM, 2015, Martín-Llaguno *et al.*, 2015) and the surveyed participants have a homogenous profile. In both cases, the most common profile is the graduate in journalism, who represent 60.8% of the surveyed professionals and nearly half between the communication directors (Martín-Llaguno *et al*., 2015). It is important to note that journalists predominate in all the analysed levels of corporate communication, and that is why within corporate communication it is even considered that the sector is essentially journalism (DIRCOM, 2015).

Only 21.5% of respondents hold a degree in advertising and PR. These data highlight once more the limitations of the ANECA white paper (2005) with respect to communication degrees, as several studies have shown (Castillo and Xifra, 2006; Magallón, 2004; Matilla, Hernández y Losada, 2010; Matilla and Hernández, 2010, 2011, 2012, 2013; Hellín and García, 2011; Moreno, Carrasco and Saperas, 2014; Perlado and Saavedra, 2017; and Xifra, 2007). These studies highlight the need to match the offer of competencies in PR and advertising, emphasise the strategic nature of corporate communication, and demand the incorporation of digital skills and competencies (Perlado and Saavedra, 2017).

Recently, and in the same direction, there are international studies that provide interesting facts about Spain, such as the *European Communication Professional Skills and Innovation Programme* (DSME) and *Global Capabilities in PR and Communication Management*, directed by the Anne Gregory (University of Huddersfield).

In this way, it is necessary to take into account all these studies as well as the contributions of grey literature (DIRCOM, 2016; EOI, 2010; APM, 2015,2016) to review and adapt the curricula of communication degrees. Despite the fact that advertising, PR and journalism have been regarded with suspicion as different functions within a profession, in the current context, with the predominantly strategic character of communication and a highly digitised environment, tasks, functions and responsibilities are moving and redefining towards fuzzy, common yet unpredictable, spaces.

The present study also puts in evidence that half of the top 30 consulting firms operating in Spain are originally from Spain and have an average age of 25 years. As it happened with the presence of the communication director profile in companies (DIRCOM, 2015; EOI, 2010 and Martín-Llaguno et al, 2015) and as a reflection of the common practice of outsourcing communication services among large companies, there is a geographical concentration of consultancies in Madrid and Barcelona. These data, which in principle may seem negative, reflect the potential growth of an industry that is increasingly required and offered by smaller companies. In this sense, the research shows that medium-sized companies (with a revenue of 5 to 10 million €) account for more than half of the revenue of the top 30 consultancies and saw the largest revenue increase, of nearly 22%.

One of the most important conclusions of this research is that there is no widespread model in the structure of consulting firms: 72.4% of the companies do not disclose in their websites the sectors they work with, 55.2% do not specify the areas of specialisation of the services they provide, and 13.8% do not specify the services they provide. Likewise, we have observed that in any case consultancies are structured by functional departments as it occurs in advertising agencies (Estanyol and Lalueza, 2014).

Despite these data, the most common areas of specialisation in the consulting firms are those devoted to people (84.6%), public affairs and institutional relations (69.2%), online communication (53.8%) and financial communication (53.8%). The presence of the area of online communication is significant with respect to the data provided by ADECEC in 2008, in which the only service related to new technologies was the creation of web pages. These data demonstrate once again the continuous changes in the professional sector and these changes must necessarily be reflected in the curricula (Perlado and Saavedra, 2017).

While knowledge of the sector in which they companies operate is one of the crucial aspects to select a consultancy firm (Grupo Consultores, 2015), only half of the consultancies are structured according to these criteria and when they are they all cover the area of health and 75% cover the area of tourism. On the other hand, art and culture, sports, public administrations and infrastructures, transport and logistics are the least offered areas of specialisation.

In addition, according to the data of this study, consultancies have increased the number of services they offer clients, with an average of almost 11 services against the 5-8 services offered in 2011 (Estanyol and Lalueza, 2014). These data are a clear example of the adaptation of consultancies to the needs and demands of the market.

On the other hand, digitisation has led to a transformation of the range and functions of professional communication, which went from being a tactical element where the traditional press office was limited to the relationship with the media and the publication of press releases, to a more strategic position aimed at the management of intangible assets (reputation, brand, CSR...) but also including other tasks related to the digital world (web, social networks, blogs, apps...). In this sense, if we look at the services provided by consultancies we see that almost all of them offer strategic communications management (92%), content creation (84%), digital marketing (84%) and institutional relations and press office (80%). As research examining the evolution of the profession shows, relations with the media, which had an important position a decade ago (ADECEC, 2008), are no longer listed with the same intensity. On the other hand, strategic communication maintains the same predominant position (ADECEC, 2008), which clearly reflects the importance of intangible assets in the business field (DIRCOM, 2015; Villafañe, 2012; Miquel-Segarra, 2016).

The recent economic crisis, new technologies, social networks and the digital environment, added to the crisis of traditional media, have changed the way in which companies and brands relate to their publics. In line with this new reality, consultancies are constantly reinventing and including in their range of services those resulting from the needs and trends of the sector. One of the main challenges the sector has had to face is the digital transformation (Grupo Consultores, 2017). If we compare this requirement with the results of our research we will see that these needs are reflected in the services offered by consultancies: 53.8% include in their areas of specialisation online communication, and, if we analyse services, 84% of consultancies offer digital marketing, and 56% social media services.

For authors like Estanyol and Lalueza this need for adaptation to the new digital environment makes consultancies to "compete directly in this area with advertising agencies and agencies specialised in communication in new media" (Estanyol and Lalueza, 2014:158). These data reflect once again that the new communication landscape blurs the borders between advertising and PR (Estanyol and Lalueza, 2014). Therefore, this research reaffirms the creation of this type of specialised departments within consulting firms.

Finally, we confirmed that although the online communication of consultancies has also been adapted over the years and includes presence on major social networks, consultancies are not very innovative in the incorporation of the novelest social networks.

Without a doubt, this research suffers from limitations mainly caused by the heterogeneity of the sector and the lack of sources and references to quantify their reality. For this reason, it would be advisable to expand the sample beyond the top grossing consultancies. It would also be interesting to perform a qualitative analysis to be able to assess the perception of professionals in the sector and even to quantify the revenue of each of the services and develop a classification of the regular clients of consulting firms.

All these limitations provide, at the same time, offer possibilities for future research that may delve into the knowledge of consultancies as well as the roles, competencies and even skills required by the communication consultant profile.

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5. Notes

[1] According to Pavlik (1999), introspective research refers to the actors of the PR process (the customer and its department; the PR agency or firm; and the media likely to be protagonists of the actions) interrelated with numerous variables such as age, sex, level of studies and work experience of employees; as well as the activity they perform, their remuneration, the type of service provider (structure, activities, etc.), associationism, current legislation in this regard, the teaching of the discipline and the profession in the classroom, etc.

[2] This ranking comes from the INFORMA D&B S.A. (SME) database, which feeds from multiple public and private sources of information: the BORME (Official Gazette of the Mercantile Register), Deposits of Official Accounts, the BOE (Official Gazette of the State), the provincial and regional Gazettes, the national and regional press, purpose-created research works and several publications. This ranking includes all companies that deposited normalised financial statements in the public registry of commerce. It does not include, therefore, companies that presented their financial statements in the business register with specific presentation formats, different from the standard 2007 General Chart of Accounts (http://ranking-empresas.eleconomista.es/sector-7021.html).

[3] The Bologna Process aims to create a system of academic degrees comparable and easily recognisable; promote the mobility of students, teachers and researchers and ensure quality teaching; and the adoption of a European higher education area (http://www.europa.eu).

[4] The consulting firms considered as small in economic size (with revenue between 1.5 and 5 million €) occupy the 15th and 30th positions in the ranking of Prnoticias and Torres-Carrera; the medium size firms (with revenue between 5 and 10 million €) occupy the 3rd and 14th positions; and the large size firms (revenue over 10 million €) occupy the first two positions in the aforementioned ranking.

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