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Innovative Perspectives on Corporate Communication in the Global World

María-Dolores Olvera-Lobo, Juncal Gutiérrez-Artacho, Irene Rivera-Trigueros, and Mar Díaz-Millón

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Detailed Table of Contents

The main purpose of this chapter is to examine the digital marketing tools used by businesses in the light of developments in corporate communication and interaction with consumers. For this purpose, a literature review has been made by considering the most used digital marketing tools. Firstly, the transition from traditional communication tools to digital tools is discussed with the stages from Web 1.0 to Web 5.0 in the development of the internet. The 7S concept that businesses have to use to realize digital marketing applications is mentioned. Then, the concepts of search engine marketing, search engine optimization, e-mail marketing, display advertising, online public relation, social media marketing, and chatbots are explained. It is mentioned how businesses use these marketing practices, positive and negative factors related to each application were examined, and examples from businesses were given.

Brands add value to the products or services they represent. Consumers distinguish products or services from others through brands and impose meaning on products and services. Currently, individuals are brands and trying to get the attention of others. In a process called personal branding, individuals promote themselves and make them a brand. One of the most important factors that makes it easier for individuals is social media. Social media allows users to create their own profiles, open their own channels and share content, making ordinary individuals visible and effective. Individuals make great strides for their careers by creating their own brands in these platforms of their own.

media reactivate the known 5W, and how the conventional news item dies on paper and is 'resuscitated', transformed into the digital medium, and to how we place ourselves before a transmedia news structure that changes from inverted pyramid to the Rubik's Cube, we now go one step further and put the spotlight on the processes of content building in the digital realm themselves.

Section 3
Corporate Communication and Digital Marketing

This chapter focuses on an analysis of the communicative marketing strategies carried out by Spanish small and medium-sized enterprises (SMEs) through their digital media channels (websites, blogs, Twitter, and Facebook profiles). The content analysis allowed the authors to identify strategies of inbound marketing and engagement with users on social networks. Regarding the latter, they identify whether the paradox of the positive can be fulfilled. The methodology included, on the one hand, a qualitative analysis of corporate web communications in different social media. On the other hand, the content of messages was categorised into elements of digital marketing. The results obtained show the Spanish web panorama of interaction, engagement, and communication strategies of entrepreneurial SMEs in COVID-19 context, during and after lockdown.

The Nigerian scam is widely regarded as a joke among digital natives. However, forms and variations of the Nigerian scam have been successful since the 16th century and continue to be so, even in the 21st century. The longevity of the scam hints at the exploitation of very basic human processes. Therefore, this chapter tries to analyze these processes from a psychological standpoint trying to derive principles for effective online communication. The different phases of the scam—from the creation of the target group until the final contact—are analyzed from psychology of persuasion as well as behavior economics standpoints—subsumed under the label of "nudging"—trying to identify the settings, scenarios, framings, and signals which make the scam one of the most successful scams in history. In the final section, it will be attempted to transfer the insights from the Nigerian scam to legit online marketing and corporate communication.

Preface

CORPORATE COMMUNICATION AND THE GLOBAL WORLD

Corporate Communication Strategies and Digital Marketing

Corporate communication, as defined in literature, is a tool to harmonize all used forms of internal and external communication as efficiently and effectively as possible in order to create a favorable basis for relationships between a business and every group it depends on (Argenti, 1994; Gray & Balmer, 1998; Hooghiemstra, 2000; Van Riel, 1995). In this context, today's information society has led to an evolution in the strategies adopted in the business environment for the dissemination of corporate information and for communication with potential customers and stakeholders. Indeed, the information society provides great opportunities for companies when it comes to pursuing their professional activity and offering their products and services to clients and customers.

Information and Communication Technologies (ICTs) have meant great change at all levels of society, and the business sphere is no exception. ICTs are a great indicator of the ability of companies to adapt and compete in globalized environments (Peris-Ortiz et al., 2014). They allow messages to reach a global audience at a considerably reduced cost. All this has led companies to worry not only about designing effective strategies to deliver their messages to different audiences, but also to analyze the quality of the media in which they will appear, in order to preserve their image and, by extension, their reputation in digital media (Maestro Espínola et al., 2018). So, corporate reputation management is dominated by ICTs that have transformed the dynamics of people's behavior and their interactions with institutions (Maestro Espínola et al., 2018).

The application of digital technologies in order to achieve profitability and retain clients is essential. To achieve this, it is essential to recognize their strategic importance, and develop a planned approach to improve knowledge about customers, gain effective communication and offer online services adapted to individual needs (Chaffey & Smith, 2013). Digital marketing, appears as a cornerstone for corporate communication. Kotler & Armstrong, (2007) define digital marketing as all the efforts made by a company to promote and sell products or services through the internet. For their part, Chaffey & Smith, (2013) emphasize the application of digital technologies to contribute to marketing activities aimed at achieving profitability acquisition and customer retention. Digital marketing is today one of the pillars for building relationships between consumers and businesses, as it promotes the creation of communities and interaction, favoring loyalty (Lahuerta Otero & Cordero Gutiérrez, 2015; Piñeiro-Otero & Martínez-Rolán, 2016).

It is a well-known fact that companies must pay special attention to the opinions and demands of consumers, since they have become unusually important –a transmission of power from the former to the latter (Shaltoni et al., 2018)–. Hence, digital marketing also includes other tools such as social networks. These, via the multiple platforms they offer, are a great medium for the interaction and expansion of social circles, and for sharing information, organizing events and communities, and even improving competitive positions (Peris-Ortiz et al., 2014; Shaltoni et al., 2018). From a broad perspective, digital marketing, in addition to including social media, web search engines and mobile applications, among others, also includes various channels that do not require the use of the Internet –such as mobile messaging– (Financial Times, 2014). This new approach to digital marketing, demands a deep understanding of consumer behaviors. For this reason, authors such as Kotler & Armstrong (2007) or Chaffey & Smith (2013) consider it essential to recognize the strategic importance of digital technologies and to develop a planned approach aimed at improving knowledge about customers, achieving effective communication and offering online services tailored to individual needs.

Multilingual Dissemination of Corporate Information

As indicated above, information society and the globalized market have given companies of all sizes and from all sectors valuable opportunities to reach potential international clients. Internationalization is a complex process which involves the expansion of companies' operations to foreign markets and this activity can also result from punctual and independent actions (Korsakiene & Tvaronavičiene, 2012). Thus, the internationalization of a company, from a strategic point of view, requires the implementation of strategies that generate flows of different types between different countries (de la Hoz Hernandez et al., 2020). In this way, entering new markets requires cultural knowledge and localizing language –adapting the translation language to a specific culture or locale– to be close to customers and stakeholders (Clavijo-Olmos, 2018).

In view of the foregoing, website translation and localization play a key role in business internationalization and, consequently, these topics have been widely researched in recent years. For instance, Ahlfors & Fang (2017) explored the relationship between firm internationalization level in online business and their language strategy and their findings showed that language decisions are statistically significant in the geographical expansion of companies and draw attention to the importance of online language strategies for international expansion. Several studies have pinpointed the role played by multilingual dissemination strategies, such as localization and transcreation, in the internationalization of companies and in their outreach for new costumers (Cermak & Smutny, 2017; Gutiérrez-Artacho & Olvera-Lobo, 2017; Malenkina & Ivanov, 2018; Medina Reguera & Ramírez Delgado, 2015; Rike, 2013; Singh et al., 2009, 2012). Localization is understood as a communicative, technological, textual and cognitive process through which websites are modified to be used by audiences around the world other than those initially intended (Jiménez-Crespo, 2013). For its part, transcreation is the process through which certain parts of a text are translated and others are creatively reinterpreted (Benetello, 2018; Gaballo, 2012; Pedersen, 2014). These activities have given rise to new professional profiles that help to close the gap between businesses and their potential customers through the Internet, breaking geographical, social and linguistic barriers and overcoming communication problems raised by the scenario of international trade (Tigre Moura et al., 2016). Both localization and transcreation are characterized by the use of new software tools, the mastery of communication channels and the acquisition of market knowledge (Olvera-Lobo et al., 2017). That is the reason why they entail key activities in corporate communication.

Ethical Considerations on Corporate Communication

Many social systems have been put to the test by the COVID-19 crisis. Examples of these processes are corporate communication and public relations, which face an extraordinary situation that is impossible to predict and from which lessons will have to be learned for the future (Xifra, 2020). Companies that apply corporate social responsibility strategies (CSR) and are perceived as socially responsible have greater support from the public, which results in positive behaviors towards them, either through the purchase of their products or services, recommendation, interest in working for them, interest in investing, etc. (Carreras et al., 2013). Different works in recent years seem to support the claim that CSR builds social capital and enhances stakeholder trust in and cooperation with high-CSR firms (Eccles et al., 2014; Kim et al., 2012; Lins et al., 2017).

CSR has entered the public debate and academic research. Issues such as sexism in advertising and marketing, green sustainability or sustainable development objectives are increasingly present in corporate communication planning and research.

CORPORATE COMMUNICATION TODAY

As described in previous sections of this preface, corporate communication entails a key process for businesses of all sizes and from all sectors in today's globalized world. Globalization brought about by technological advances has opened the world to international trade more than at any other time in history (Song et al., 2016). In order to survive in such a competitive market influenced by the successive crisis produced in recent years (the financial crisis in 2008 and the COVID-19 crisis in 2020), companies need to employ all the tools at their reach to thrive. This includes applying strategies to disseminate their information, reaching out to as many users as possible.

To do this, ICTs provide nowadays a wide range of possibilities, tools and applications. Digital marketing has opened the door to a world of different strategies for companies to transmit their content to a wide variety of audiences, thus changing the traditional relationship between businesses and consumers. This paradigm shift has given raise in academia to the appearance of multiple innovative perspectives on corporate communication in the global world. For such reasons, this book, *Innovative Perspectives on Corporate Communication in the Global World*, provides contributions to satisfy the needs of stakeholders involved in corporate communication processes.

WHO IS THIS BOOK FOR?

This book is for all who identify as a stakeholder in the corporate communication context, including, but not limited to: digital marketing tools developers, marketing experts, experts in the field of corporate communication, and language professionals such as translators, localizers and transcreators. The primary purpose of this book is to provide some common understanding about the methods, processes and tools that can be adopted to achieve corporate internationalization goals. In corporate communication, several factors intersect and affect its effectiveness. For example, the development of new digital tools, the design of new corporate communication strategies or the proposal of new ways of breaking social and linguistic barriers between technology users. In such a globalized world as today's, corporate communication is highly affected by technology, digital tools and social media. The traditional way for businesses to address consumers is changing and evolving and new and innovative perspectives need to be incorporated to adapt to those changes. In that respect, the chapters included in this book will provide readers with guidelines to adapt to the new channels of corporate communication in the global world.

WHAT ARE THE CONTRIBUTIONS OF THIS BOOK?

This book offers fourteen chapters organized in five sections. A brief description of each of the sections and chapters follows.

Section 1 includes two contributions regarding emerging trends in corporate communication. The chapters in this section overview the main characteristics of corporate communication in a globalized world and offer new and interesting perspectives on the topic.

Chapter 1, "New Media Channels in Corporate Communication and Interaction With the New Consumer," by Pinar Yuruk-Kayapinar and Ozgur Kayapinar, examines the digital marketing tools used by businesses in the light of developments in corporate communication and interaction with consumers. The authors discuss the transition from traditional communication tools to digital tools with the stages from Web 1.0 to Web 5.0 in the development of the Internet. The chapter includes a deep explanation of the characteristics of marketing practices such as search engine marketing, search engine optimization, e-mail marketing, display advertising, online public relation, social media marketing and chatbots. The authors give details of the positive and negative factor for the application of these practices and continues providing examples of how businesses can use and are using this new media channels to disseminate their corporate communication. The chapter concludes with a brief description of the potential of social networks as well as other digital communication tools, in the marketing field.

Chapter 2, "Social Media and Career Building," by Kemal Elciyar, focuses in an innovative and interesting trend in corporate communication: self-branding or personal branding. The author discusses how brands add value to the products or services they represent and consumers distinguish products or services from others through brands and impose meaning on products and services. This chapter introduces the premise that, in a global world as today's, individuals are brands and trying to get the attention of others. In the mentioned process of personal branding, individuals promote and make themselves a brand. One of the most important factors that makes it easier for individuals to achieve this goal is social media. Social media allows users to create their own profiles, open their own channels and share content, making ordinary individuals visible and effective. The author concludes pointing out that individuals make great strides for their careers by creating their own brands in these platforms of their own.

Section 2 contains three chapters discussing innovative corporate communication strategies from different perspectives. This supposes a stimulating contribution to the research field of corporate communication.

Chapter 3, "Managing Corporate Terminology as an Internationalization Strategy," by Melania Cabezas-García, focuses on internationalization and on one of the tasks that can be carried out for it, such as corporate terminology management, which ensures that the correct terms are consistently used within the company, in line with set goals. Despite terminology management being and effective internationalization strategy, many enterprises do not invest in managing their terminology, which can lead to a wide range of problems. This chapter describes a general framework for managing terminology in commercial settings. The steps include: (i) corpus preparation and compilation; (ii) term extraction; (iii) conceptual analysis; (iv) identification of equivalents; and (v) representation and storage in terminology management systems. The author concludes stating that the results presented show that corporate terminology management is viable and companies can obviously benefit from the participation of a linguist in their internationalization planification.

Chapter 4, "Relationship Marketing and Communication as a Driver of Fundraising Loyalty and Success in Non-Profit Organization," by Joana Macedo, Márcia Gonçalves and Bruno Barbosa Sousa, deals with the concept of competitiveness as a growing phenomenon. The authors claim that the quality and innovation in art of doing business is becoming increasingly evident, showing the need for organizations to create mechanisms capable of adding value to consumers. Therefore, fundraising policy planning becomes a priority for Non-Profit Organizations (NGO). This chapter aims to prove the contribution of fundraising to the sustainability of NGO and the impact of relationship marketing in establishing lasting relationships between NGO and all its stakeholders. Along this work, the authors try to demonstrate the need for NGOs to rethink how they interact with their audiences, especially business patrons, in order to build their loyalty and be more successful in their fundraising activities.

Chapter 5, "The Digital Realm Blurs the Lines Between Journalistic and Corporate Communication," by Magdalena Trillo Domínguez, points out to the blurring of boundaries between journalistic and corporate communication. According to the author, not only has the digital world removed the borders between local and global communication, affording meaning to the already established "glocal" concept, but it has also blurred the boundaries between journalistic and corporate content, revitalizing what has traditionally been known in legacy media as "service journalism". This chapter supposes a continuation of the thought-provoking line of research begun three years ago on journalistic communication and new media, turning to the deconstruction process as a disruptive method to analyze processes, strategies and trends. If, then, from the perspective of methodology, the focus of attention turns to the structure of the news itself, the author goes now one step further and put the spotlight on the processes of content building in the digital realm themselves.

Section 3 includes two contributions on the role played by digital marketing in corporate communication since its origins to the present day, when multiple factors change and influence the tools employed in this activity.

Chapter 6, "Digital Marketing in Times of COVID-19," by Lola García-Santiago, focuses on an analysis of the communicative marketing strategies carried out by Spanish Small and medium-sized enterprises (SMEs) through their digital media channels (websites, blogs, Twitter and Facebook profiles). The content analysis conducted by the author allowed to identify strategies of inbound marketing and engagement with users on social networks. The methodology employed in this chapter includes, on the one hand, a qualitative analysis of corporate web communications in different social media. On the other hand, a categorization of the content of messages into elements of digital marketing. The results obtained show the Spanish web panorama of interaction, engagement and communication strategies of entrepreneurial SMEs in COVID-19 context, during and after lockdown. This chapter provides, then, an interesting new perspective of the effects of the sanitary crisis provoked by the COVID-19 pandemic in the field of business communication.

Chapter 7, "A Nudge Psychology Perspective on Digital Marketing and Communication," by Till Neuhaus, offers some innovative perspectives on a topic widely regarded as a joke among digital natives: the Nigerian Scam. Forms and variations of the Nigerian Scam have been successful since the 16th century and continue to do so, even in the 21st century. The longevity of the scam hints at the exploitation of very basic human processes. Therefore, this chapter tries to analyze these processes from a psychological standpoint trying to derive principles for effective online communication. The different phases of the scam –from the creation of the target group until the final contact– are analyzed from psychology of persuasion as well as behavior economics standpoints –subsumed under the label of “Nudging”– trying to identify the settings, scenarios, framings, and signals which make the scam one of the most successful scams in history. In the final section, the author attempts to transfer the insights from the Nigerian Scam to legit online marketing and corporate communication.

Section 4 contains four chapters dealing with different aspects of the multilingual dissemination of corporate information. These contributions address strategies and media channels helpful for corporate communication in international contexts.

Chapter 8, “Websites, Social Networks and Corporate Translation,” by Irene Rivera-Trigueros, aims at analyzing how southern Spanish companies in the dentistry sector employ Web 2.0 tools available to them and at studying the availability of multilingual information in their corporate websites. To this purpose, the results of several studies have been gathered in this chapter. These studies considered criteria such as having or not a corporate website and social networks; the translation or not of the website content; and number of languages available, among others. Results show that a significant amount of the analyzed SMEs do not have a website or social networks. In addition, those having a website do not, generally, translate its content, which limits international customer acquisition and the opening to international markets. Concerning social networks, SMEs which do have any kind of social media, generally, have small communities and they do not post frequently, which limit the implementation of digital marketing strategies.

Chapter 9, “The Role of Transcreation in Corporate Communication,” by Mar Díaz-Millón, addresses an emerging trend in multilingual dissemination of corporate communication: transcreation. In a globalized world, companies need to have their online information linguistically and culturally adapted to access international markets. According to the author, transcreation is an interlingual creative re-interpretation of a text made considering the linguistic and cultural differences between the target and the original audiences. One of the main sources of corporate information is the corporate website. The US healthcare sector is one of the major industries in the world. Hence, studying the characteristics of their dissemination of corporate information is relevant to know the keys of a fruitful corporate communication. The main objective of this chapter is to identify the keys of a web transcreation process. For this purpose, the author analyzes the website of the company Pfizer and compares the original US-English and the Spain-Spanish websites. The analysis provides the keys to a successful transcreation process.

Chapter 10, “Quality Evaluation and Workflows in Transcreation,” by Oliver Carreira, continues studying the role of transcreation. In this case, this chapter is oriented to provide some knowledge about two areas in transcreation that have not been thoroughly researched in this field: workflows and transcreation. For this purpose, a social methodology is proposed. By interviewing a group of four professional transcreators, it is expected to obtain more information on these two areas. Taking into account the results obtained in these interviews, a general workflow diagram is proposed. Likewise, a general quality assessment model is suggested for transcreation. The author concludes that this study offers a good starting point for further research, despite the nature and limitations of this proposal.

Chapter 11, “Seeking Spaces of Convergence,” by Nuria Ponce-Márquez, presents a state-of-the-art analysis of cognitive accessibility in Spain and its convergence with Translation Studies, as well as a descriptive approach to the level of web accessibility of Spanish institutions and corporations. The chapter is therefore divided into three main sections: firstly, a road map of the convergence of cognitive accessibility and the fields of Applied Linguistics (AL), Pragmatics and Translation Studies (TS) from the perspective of a number of Spanish researchers; secondly, a description of the current situation in Spain in terms of laws, decrees and associations using easy-to-read tools as one of the main instruments of cognitive accessibility; and thirdly, a descriptive approach to the level of web accessibility in Spanish institutions and corporations.

Section 5 includes three contributions on ethical considerations of corporate communication. These chapters deal with different issues, such as sexism in advertising, green sustainability and sustainable development goals.

Chapter 12, "Sexism and Advertising in the Global World," by Ana Sofia Monteiro Cardoso, Ana Teresa Pedreiro and Bruno Barbosa Sousa, addresses the issue of sexism in corporate communication. The authors claim that sexism and daily sexist attitudes and behaviors contribute to gender inequality, happen in a large scale and seem to be a recurrent problem. This chapter reviews previous scientific literature in which the majority of authors state that sexism can be divide in two categories: benevolent sexism and hostile sexism. One of the major problems is that the concept of sexism still faces, along with the concept of feminism, a society misunderstanding of the concepts. In an exploratory and conceptual perspective, this manuscript presents contributions for communication, marketing and advertising around the phenomenon of sexism. In a more practical contribution, the case study focuses on the motives why sexism in advertising does not seem to bother consumers when they decide to purchase an item. This chapter aims to present a critical review and theoretical contribution about sexism and advertising in the global world.

Chapter 13, "NGO Sustainability Indicators," by Teresa Pozo-Llorente, Cristóbal E. Jorge-Bañón and José Gutiérrez-Pérez, revolves around the commitment to sustainability of Non-Governmental Organizations (NGOs). It deals with the construction of a system of indicators of the greening of these organizations, taking as a reference the possible evidence of their commitment to sustainability. These indicators have constituted the basis for the design and validation of an observational record (an estimation scale) to assess said commitment. This observational scale, made up of 51 indicators divided into 10 large dimensions, enables the estimation of the degree of presence of these aspects in the work carried out by NGOs, using the information available on the corporate web portals of these organizations as a source of analysis. From an exploratory perspective, and after applying the designed instrument, this work aims to characterize the greening tasks developed by eight NGOs.

Chapter 14, "Socio-Corporate Impact of the Sustainable Development Goals in Higher Education: The Case of Public Universities in Andalusia," by Abigail López-Alcarria, María de Fátima Poza-Vilches and Teresa Pozo-Llorente, focuses on the challenge faced by universities of becoming competently sustainable institutions. A crucial role is played by SDGs in a university's progress toward sustainability, which under the umbrella of the 2030 Agenda, set out the challenges faced by these institutions. This chapter determines the extent to which the prism of sustainability is present in the strategic planning of the public universities of the Andalusian Autonomous Community (Spain) and in their governance models. For this, the authors undertake an analysis of the strategic and operational plans of these institutions, focusing on the presence of SDGs in the various lines of action contained within them. In parallel, the socio-corporate image that these universities project from a sustainability perspective was analyzed. The results show that these universities are motivated toward implementing a sustainable governance model, but they also highlight a number of deficiencies in addressing some SDGs that are sure to become future challenges.

CONCLUSION

This book contributes to the research on corporate communication in the current global world for diverse reasons. First, it provides new interesting perspectives on emerging trends surrounding the communication of businesses and companies: new media channels, new tools, among other aspects. Second, on the other hand, it proposes new corporate communication strategies studied and validated by experts, which can highly contribute to improve the dissemination of corporate information by companies. Third, this collective work highlights the prominent role played by digital marketing nowadays in corporate communication. The current panorama of digital marketing is drawn and new perspectives are proposed and examined. Fourth, in addition, this book addresses a facet of corporate communication that is frequently forgotten: multilingual communication. As the multilingual dissemination of corporate information is a key activity in internationalization processes, it merits a special place in these studies. Fifth, finally, this publication also focuses on ethical considerations regarding corporate communication, as these entail a cornerstone in effective and efficient corporate communication.

For all the above-mentioned reasons, this book provides an important contribution to the study of corporate communication. More precisely, it offers an interesting set of innovative perspectives on corporate communication in the global world.

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Section 1

Emerging Trends in Corporate Communication

Chapter 1
New Media Channels in Corporate Communication and Interaction With the New Consumer:
Digital Marketing

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ABSTRACT

The main purpose of this chapter is to examine the digital marketing tools used by businesses in the light of developments in corporate communication and interaction with consumers. For this purpose, a literature review has been made by considering the most used digital marketing tools. Firstly, the transition from traditional communication tools to digital tools is discussed with the stages from Web 1.0 to Web 5.0 in the development of the internet. The 7S concept that businesses have to use to realize digital marketing applications is mentioned. Then, the concepts of search engine marketing, search engine optimization, e-mail marketing, display advertising, online public relation, social media marketing, and chatbots are explained. It is mentioned how businesses use these marketing practices, positive and negative factors related to each application were examined, and examples from businesses were given.

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INTRODUCTION

The rapid development of technology day by day has enabled corporation to change their relationships and communications with consumers. For this reason, there have been great differences in the functioning of the corporate lives of the businesses. With these differences, corporations started to use technology in their corporate communications and adopted new media channels by using digital tools instead of traditional marketing activities. The formation of a new media and sector with digital marketing has completely changed the means of enterprises to introduce themselves to the target audience, to create corporate communication and to announce their brands.

Keeping up with the digital age has become one of the most important elements for them to survive their corporate assets and communicate effectively with consumers. Therefore, they faced a less static and more dynamic communication process. In this dynamic process, digital marketing channels have been the biggest supporter of businesses in corporate communication and interaction with consumers in order to gain competitive advantage. Announcement of a product and a brand to the target audience with promotional tools in traditional marketing activities such as advertising, public relations, personal sales, sales development, has started to differentiate with digitalization, and these promotion tools used in traditional marketing have started to be revised with digital methods. In order to understand these changes and to use them effectively and efficiently, it is necessary to analyze and examine the transition from traditional to digital for both corporate communication and interaction with consumers. Because success in digitalization depends on bringing traditional approaches together with the internet in order to catch the competition, which makes its weight felt day by day.

Porter (2001, p:3) expresses this situation as follows:

The key question is not whether to deploy Internet technology—companies have no choice if they want to stay competitive—but how to deploy it. Here, there is reason for optimism. Internet technology provides better opportunities for companies to establish distinctive strategic positionings than did previous generations of information technology. Gaining such a competitive advantage does not require a radically new approach to business. It requires building on the proven principles of effective strategy. The Internet per se will rarely be a competitive advantage. Many of the companies that succeed will be ones that use the Internet as a complement to traditional ways of competing, not those that set their Internet initiatives apart from their established operations. That is particularly good news for established companies, which are often in the best position to meld Internet and traditional approaches in ways that buttress existing advantages. But dot-coms can also be winners—if they understand the trade-offs between Internet and traditional approaches and can fashion truly distinctive strategies. Far from making strategy less important, as some have argued, the Internet actually makes strategy more essential than ever.

In the light of the above information, firstly, the relationship between digital marketing and corporate communication will be discussed, and the strategies necessary for businesses to adapt to digital marketing will be mentioned. Then, the development of the internet, which should be examined for the transition to digital marketing, will be examined from Web 1.0 to Web 5.0. Finally, digital marketing tools most used by businesses such as search engine marketing, search engine optimization, e-mail marketing, display advertising, online public relation, social media marketing and chatbots will be handled. While discussing these digital marketing tools, their advantages and disadvantages will be examined, and suggestions will be made on how businesses can overcome disadvantages. In addition, it will examine how to use the tools of the digital marketing business by giving examples from Turkey and the world.

LITERATURE REVIEW

Digital Marketing and Corporate Communication

The meeting of corporate communication with new technologies started with the emergence of the internet. For this reason, it is necessary to examine the development of the internet in order to learn when new technologies started to be used by corporation and at what stages they developed.

Web 1.0: It was the first generation of the Web and was created by Tim Berners-Lee, who worked at CERN (The European Organization for Nuclear Research) in Geneva, Switzerland in 1989, and lasted until 2005. Web 1.0 has been recognized as a read-only web with little interaction, where it is not possible to interact with the website. Web 1.0, which allows information to be searched and read, is static and the user contributes very little to content. In addition, Web 1.0 is only understandable by humans and cannot work with the machine; the contact information provided by Web 1.0 is only e-mail, fax, phone number and address; it contains static web pages and uses basic HTML (Hypertext Markup Language); it does not support mass publishing (Patel, 2013).

Web 2.0: Web 2.0 is the second generation of the web and emerged in the first half of the 2000s. Unlike Web 1.0, the problem of one-way communication of Web 1.0 was overcome with this period. Platforms such as MSN, blogs, social networks, podcasts began to become the main communication method (Chaffey & Ellis-Chadwick, 2012). With Web 2.0, with the social networks (Facebook, Twitter and YouTube) becoming the main communication tools, people started to interact with web pages and began to comment and share about corporations, products and brands (Ulker-Demirel, 2019). Therefore, the starting date of communication methods using today's internet technologies coincides with the date of the emergence of web 2.0.

Web 3.0: The basis of Web 3.0, also called the Semantic Web, is data integration and is the third generation of the World Wide. Tim Berners-Lee is the founder of the Semantic Web as well as Web 1.0 (Patel, 2013). Web 3.0 is not only a literacy web, but also a web that focuses on individual users and machines. It focuses on the smart connection between people and machines. It is named Semantic Web because it is "*An attempt to represent knowledge in a way that allows computers to automatically come to conclusions and make decisions as a result of a certain type of reasoning*" (Loretz, 2017). Fuchs et al. (2010), Web 1.0, Web 2.0 and Web 3.0 are expressed as follows: Web 1.0 is a cognition tool, Web 2.0 is a platform for human communication, and Web 3.0 is a networked digital technology that facilitates human collaboration.

Web 4.0: Web 4.0 has emerged as Ultra-Intelligent Electronic Agent, symbiotic web and Ubiquitous web, which provide human communication with the machine. It is defined as a consumer electronics. It is the machine learning. For example, if you visit amazon.com numerous times, it will recognize you and provide personalized advice about you that you may like (Patel, 2013). In addition, it is thought that a machine will be as smart as a human brain, especially with Web 4.0 technologies that are thought to exist between 2020 and 2030. Smart interactions such as virtual realities, holograms, and the connection of home appliances, known as the internet of things, to the internet have also emerged with this technology.

Although you have no cut definition of how it will be, ***Web 5.0*** technology will emerge after 2030 and will be named as "The Telepathic Web" or "The Symbionet Web" (Khanzode & Sarode, 2016; Loretz, 2017) . Today, although *Web 5.0* and *Web 6.0* are mentioned and possible technological developments related to these technologies are put forward, it is said that there is no definite definition and statement about these technologies yet.

Considering all these developments and changes in internet technologies, it can be said that the digital marketing applications, tools, channels or activities, which are required for corporate communication and interaction with consumers, emerged with Web 2.0. These changes in web technologies have enabled consumers to become more active in the digital environment, so the practices of businesses have also changed. These developments have enabled digital consumers to replace traditional consumers (Yuruk-Kayapinar, 2020).

Ryan and Jones (2014, p:21) summarizes the importance of digital marketing as follows: "*Why do you need a digital marketing strategy? The simple answer: because without one you will miss opportunities and lose business."* This question and answer put forward the obligation of businesses to use digital marketing activities today. Almost all businesses need digital marketing. It has to keep up with change and development. Otherwise, as in the answer to the question, businesses that cannot adapt to digital marketing will soon disappear.

Whether or not your business is suited to digital marketing depends very much on the nature of that business, where it is now, and where you want it to go in the future (Ryan & Jones, 2014). Digital marketing is defined as achieving marketing targets using digital technologies and digital media. But for this, traditional communication techniques and activities should also be taken into consideration. In addition, in order to manage digital marketing applications corporately, it is necessary to consider the main factors called 7S: Strategy, Structure, Systems, Staff, Style, Skills and Superordinate Goals (Chaffey & Ellis-Chadwick, 2016):

Strategy: The importance of digital marketing in creating, influencing and supporting an organization's strategy is revealed by the efforts to make annual planning, to develop techniques to use digital marketing, and to align digital strategy with the marketing strategy of the organization.

Structure: To support digital marketing in an organization, the organizational structure needs to be changed. In order to do this, it is necessary to integrate digital marketing and e-commerce with other managements in the organization, to adapt corporate communication, brand marketing, direct marketing practices to the organization and to recruit information technology personnel within the marketing department.

Systems: In order to apply digital marketing techniques, information systems should be developed and existing processes and procedures should be changed. In order to do this, activities such as planning campaigns, managing and sharing customer information must take place.

Staff: The age, gender and background of the staff who will perform digital marketing applications within an organization are extremely important. Attention should be paid to issues such as recruiting staff, developing and training personnel in digital marketing techniques, and performing virtual work activities.

Style: Style forms the way staffs work and behave, especially the managers, and the cultural style of the organization in achieving an organization's goals. The role of the digital marketing team is also important at this stage. Whether the team is dynamic, is it effective within the organization, and whether they can create digital strategies, answers are sought.

Skills: The talents and skills of the staff who will implement digital marketing strategies and techniques should make a difference. Especially applying project management, affiliate marketing, content management, online advertising, SEO (Search Engine Optimization) and email marketing techniques reveal the skills of the staff.

Superordinate Goals: The Superordinate goals change both the internal and external perception of the organization. The goals created by the digital marketing team together with the top managers and the staff they work with include the culture, corporate communication and values of the organization.

All businesses need to consider this 7S and establish a strategic framework for digital marketing activities. After creating this framework, they need to decide which digital marketing tools to choose in order to reach their consumers. For this, businesses need to know digital marketing tools and applications very well. When adopting and implementing digital marketing activities, a business must strive not only to achieve consumer or customer reach strategies, but also to achieve and improve corporate communication. Businesses must first consider the digital applications required for corporate communication and then look for ways to adapt the digital marketing strategies required for communication with consumers. In order to establish a corporate communication strategy, practitioners need to understand the industry and social issues the organization is in and be experts in using communication to remove obstacles to success (Steyn, 2003).

Corporate communications executives and practitioners have also sought industry leadership in order to reach their employees and target more effectively by using emerging tools such as blog, intranet and social media (Porter et al. 2007). With these tools, businesses are striving to improve their communication with their employees. In traditional methods, while news about businesses emerged formally through corporate bulletins, public relation, sponsorship, word of mouth communication, corporate identity, corporate newspapers and articles, and while employees within the business wait to come face to face to communicate with each other or communicate via phone, all these traditional methods are left behind through digital methods. Instead of all these traditional methods, corporate websites, corporate online media bulletin, corporate search engine optimization, corporate social media accounts, corporate blogs enable employees to share their knowledge on any subject and exchange information in a virtual environment. Businesses, local governments, countries ... share all the news about them with these methods. By opening corporate social media accounts, employees have the opportunity to show that they belong to that corporation to people, organizations and consumers outside the organization. Therefore, in order to ensure corporate communication, organizations must first move their corporate identities to the digital environment.

DIGITAL MARKETING TOOLS

The world is constantly changing and the change is felt in all its systems. The most important factors in changing the world are technology, competition and globalization. Businesses that have developed their infrastructure functionally and adapted to technology, competition and globalization will maintain their existence at a sustainable level.

Issues to be addressed in digital marketing in the light of changes in the world, customers and competitors; Developing a solid strategy, building a high-quality web presence, search engine optimization and search engine marketing, website analytics, email marketing, social media, online public relations, affiliate marketing, online display advertising, etc. (Ryan & Jones, 2011).

No matter which digital marketing tool is applied within a business, digital marketing models, which consist of 5 basic elements and constitute the stages of customer relationship management in a digital environment, should be considered (Kierzkowski et al. 1996; Nikunen et al. 2017; Teo, 2005).

1. The first stage of the digital marketing model is ***attracting customers***. It refers to how to attract or include customers in the digital application of the business. For example, how will customers be persuaded to visit the business website. One of the most suitable tools for this method is search engine optimization.
2. The second stage of the digital marketing model is ***engaging customers' interest and participation***. After the first stage, businesses move to the stage of engaging with customers and encouraging them to make transactions. For example, content marketing, e-commerce transactions, online sales transactions take place at this stage.
3. The third stage is ***retaining customers***. At this stage, businesses focus on getting customers to return to their websites. It is necessary to constantly apply digital marketing techniques.
4. The fourth stage of digital marketing models is ***learning customer preferences***. At this stage, the focus is on collecting information about customers. The most used method for this is online survey application. With this method, customer differences are revealed and personalized or customized information is obtained.
5. The last stage of the model is the ***relating to customers*** stage. After the fourth stage, it is time to establish relationships with customers. For this, businesses use personalized communication method. The most preferred method of implementing the method is e-mail marketing and social media marketing.

There are 3 basic concepts that support these strategies and digital communication in digital marketing (Chaffey & Ellis-Chadwick, 2016):

- ***Customer Engagement:*** This concept refers to repeated interactions between the customer and the business. With positive or negative feelings, customers' participation in social networks, and comments, shares or likes on these social networks are measured by engagement in the business.
- ***Permission Marketing:*** Generally, customers agree to participate in the marketing activities of the organization as a result of a specific incentive. In order for businesses to communicate with customers, the customer must allow that communication.
- ***Content Marketing:*** It is the enrichment of text, audio, video content on the web and mobile platforms for businesses to attract customers. It is aimed to make corporate social media channels and corporate blogs more active in order to achieve business goals through digital media.

There are a lot of digital marketing tools and applications are used around the world. Some of the digital marketing tools that businesses use the most to reach, communicate, persuade, and retain consumers are as follows:

Search Engine Marketing (SEM)

The main purpose of SEM is this; promoting an organization through search engines to meet its objectives by delivering relevant content in the search listings for searchers and encouraging them to click through to a destination site. The concept of search marketing aims to increase the targeted traffic to the website and improve the ranking and listing quality of a website among both paid and unpaid results in search engines by obtaining more conversions (Grappone & Couzin, 2011). SEM makes it possible to market products to internet users by placing paid advertisements alongside natural search engine results page lists and search results. In the simplest terms, any SEM takes place with the following elements (Bhatia, 2017):

- Search technologies (Crawling and indexing),
- Application of complex programs (Search algorithms),
- Any combinations of words (Keywords in search terminology),
- Delivering the best matched weblinks (Organic Search results),
- Displaying paid weblinks (Pay Per Click),
- Into an input space (A search-box).

Another digital marketing application widely used with SEM and by digital marketing practitioners is Search Engine Optimization (SEO). SEO is a prominent application both in data collection and in relation to customers. SEO can be defined as the process of improving the volume or quality of traffic from search engines to a website with organic measures. The focus of SEO is to drive traffic from sources other than search engines. SEO is related to the following factors: content generation using social media, really simple syndication (RSS) feeds, online communities, community websites with the hopes of driving traffic and creating interest in a particular product, service, or topic (Frick, 2010).

With SEO, the corporate web page matches with keywords in search engines and rises in the first place, which increases the traffic of the corporation's web page. In addition to increasing the visibility of the corporation in search engines with low cost, it provides them with the opportunity to collect data about the people who visit the web page (Bilbil & Güler, 2017).

Branding and awareness become a powerful metric for evaluating the performance of a campaign and a viable goal to reach through SEM. A branding and awareness strategy tries to increase the awareness of the corporate website in search engines, unlike e-commerce strategies where a separate metric is calculated for each click (Colborn, 2006).

Considering the advantages of SEM and SEO, the following example can be given: When the favorite language learning program of children in the USA, Muzzy BBC decided to operate in Germany and the Netherlands, it decided to cooperate with Kubix Digital, a digital marketing agency. Trying to introduce Muzzy to the European market, the company started to serve with Google Ads. First of all, content controls were made, users' interactions with the website were monitored and followed. To track every click on the website, they have performed a Google Analytics audit and have all of the data come here. The audit process with Google Analytics consisted of account creation and management, configuration, data integrity, measurement, conversion or goal tracking and reporting. They started Google Ads search campaigns with reliable and accurate data provided from these stages. With their frequent search term analysis, they managed to increase their monthly conversion numbers. Especially with the Google Ads video campaign they started in Germany for 1 month, they ensured a 20% increase in traffic to the site. In addition, website interactions increased by 900%. Another example can be given from Mavi. Having adopted a customer-oriented strategy, Mavi wanted to bring its wide collection of products in line with fashion and trends to both existing Mavi customers and new consumers who need these products. A smart shopping campaign was designed. Product titles and descriptions were arranged and the campaigns were divided into the lowest product groups. The aim was to maximize the number of conversions. Clicks and conversions have been maximized thanks to machine learning. Data for a reduction in cost per click and an increase in conversion rate clearly showed that machine learning was optimizing the campaign correctly. In just one month, cost fell 44%, cost per click 50%, while revenue from sales increased 175%. Clicks increased by over 200% (Kubix-Digital, 2021).

Online Public Relations (e-PR)

The marketing function is an important communication tool for companies to express and express themselves to internal and external consumers. Therefore, the concept of communication comes to the fore in marketing, public relations and sales activities in businesses. Online PR has become an important issue in terms of customers' expectations and image, especially with the development of communication, both internally and externally. Online PR campaigns and applications are one of the most effective digital marketing applications since they actively use many platforms (social networks, blogs, podcasts, feeds etc.). According to Kitchen and Panopoulos (2010), since PR practices are limited to the social, economic and technological environment, they are significantly affected by the exponential growth of the internet. In the 21st century, many traditional and electronic communications are converging and intermingled.

Online PR can extend reach and awareness of a brand within an audience. It can also be used to support viral or word-of- mouth marketing activities in other media. It is aimed to maximize favorable mentions of your company, brands, products, or websites on third-party websites which are likely to be visited by your target audience.

Internet strategies created at corporate, functional and operational levels are changing due to the "new PR" effect of the internet (Phillips & Young, 2009). Today, innovations in PR field include multi user interactions, 3D animation, open objective environments and user generated content, audio and video transmission, blogging, instant messaging and Web 2.0 technologies such as chat. (Kitchen & Panopoulos, 2010). Businesses try to control their own images with their social media. Today, Online PR practitioners can develop many social, technical and psychological factors that can direct internet surfing and access (Phillips & Young, 2009). In terms of PR practitioners, the use of communication technology facilitates their work by accelerating the flow of information to reach larger masses (Eyrich et al. 2008). Determining online PR goals effectively provides a perspective on how to manage the unknowns with risk and opportunity analysis (Phillips & Young, 2009).

There is no online PR campaign that uses just one device, channel or context because the online community will change channels, platforms and contexts on its own initiative. All tactics should consider applications in different platforms, channels and contexts during the concept phase (Phillips & Young, 2009). For example, social media studies not only enable PR practitioners to reach and communicate with their customers or interlocutors, but also provide opportunities to strengthen corporate media relations (Eyrich et al., 2008).

The advantages of online PR within the framework of a campaign or a PR study are as follows (www.gopublicity.com; www.mudu.io):

- ***Cost:*** Since there is no media placement cost in online public relations costs, it is more affordable than others.
- ***Credibility:*** Independent reviews made by an individual independent of a company are considered more authentic and can therefore help increase trust in an online provider such as a retailer.

- ***Search engine optimization (SEO):*** E-PR can help generate backlinks from large sites such as online newspapers or magazines that usually have good link quality to a site that is suitable for SEO.
- ***Brand-enhancement and protection:*** Positive stories can increase a brand's reputation in its target audience and help reach a new audience.
- ***Expose brand to more people within the business target market:*** A good position in online media will help increase brand awareness in the target market and enable the business to reach more potential customers.
- ***Reach more people through social sharing:*** Online PR will expand your company's reach by making it easier for others, including the media, customers and influencers, to share your news and content with their audience.
- ***Increase traffic to website:*** Links in articles and shares on social media make it easy for people to travel directly to your website.

An example of how to increase awareness with Online PR can be given as follows. With a campaign called Netflix and CO2 Emissions, he started a study on the grounds that a 30-minute video causes 0.2 Kg of CO2 emission, and he studied and published TV series on Netflix, as well as on news sites and Forbes, Quarz, MSN and The Daily They shared these statistics on many international platforms, including their agencies such as Mail. In another example, it is seen in the study "Selfies and Shark Attaks". In an Online PR study conducted for a client in 2020, he tried to reveal that the death rate when taking a selfie is more dangerous than a shark attack in the world. As a result, the visibility of the campaign has been achieved in more than 80 places such as Fox, NY Post and CNN (Chinery, 2020).

The main disadvantage of E-PR is that it is not a controlled discipline like pay-per-click marketing or online advertising techniques such as display advertising where the generated returns will be known for a particular spend. In other words, it can be considered a high-risk investment. In addition, negative reviews are also a disadvantage. Many marketers also hesitate to create blogs or forums that might prompt negative comments on their sites. However, this disadvantage will also disappear if the business follows customer comments continuously. For example, brands such as Dell and Honda allow web users to comment on their brands, which means they are listening to customers' comments and gaining valuable sensibilities that can foster new product development ideas (www.mudu.io).

Display Advertising (Display Ads)

Display advertising is about identifying the web sites your target customers visit, buying ad space on those Web sites, and then measuring how many advertisements are viewed and clicked (Singh, 2010). Display ads is a form of online advertising where advertisers pay publishers to place graphic ads on web pages. (Chapelle, Manavoglu, & Rosales, 2014). Display ads are paid ad placements using graphical or rich media ad units within a web page to achieve goals of delivering brand awareness, familiarity, favorability and purchase intent. Many ads encourage interaction through prompting the viewer to interact or rollover to play videos, complete an online form or to view more details by clicking through to a site.

According to Zhang et al. (2014), Real Time Bidding (RTB) has recently emerged as a new display advertising paradigm. Unlike traditional sponsored search or contextual advertising, where an advertiser sets a bid price for each selected keyword for their campaign, RTB allows an advertiser to place a bid for each impression (depending on impression-level specifications) in a very short period of time (Perlich et al. 2014). Thanks to the display ads created with RTB, it is carried out in real time with a consumer entering the web page and placing an offer. When an auction is launched, a potential advertiser must determine in advance whether they want to bid on that impression, how much they want to bid, and what ad they want to show if they win the auction (Perlich et al., 2014).

Display advertisements can be edited in areas such as news sites, blogs, game sites, commercial portals, social networks, digital magazines. Display advertisement designs can be prepared within the framework of topics such as category, content, target audience and purpose, provided that they are in accordance with the corporate line of each medium (BrandingTürkiye, 2020). While the search network can reach users when they search for a specific product or service, Display Ad Network can help attract consumers' attention before the purchasing cycle begins (Google, 2020). Therefore, ads can be prepared for the consumer to see before the consumer begins to search.

In line with display advertising studies, systems that provide media applications attract a lot of attention. Spotify is one of them. As an example, Spotify, a company that provides music services, cooperates with many companies to show the advertisements of the companies on their own computer and mobile applications. For example, as a result of the agreement with Skoda, in line with the advertising campaign it has made in France for its new model, the advertisement starts with a car going from one side to the other on the screen, and the users are asked to choose three routes and playlists are displayed in the Spotify application according to the route they have chosen (Kale, 2019).

Display advertisings have some advantages and disadvantages in application. Its advantages are as follows (Campos, 2019; Iley, 2016; Vapulus, 2018):

- ***Low cost in the long run:*** Many agencies offer very low cost-per-impression rates, which means a successful display campaign will be very cost effective in the long run.
- ***Highly targeted campaigns:*** By choosing keywords, marketers know that the people who see their ads will be among the target audience. This provides more control and better targeting than most other marketing methods.
- ***Process management:*** The ad space is available in certain sizes, and this helps reduce potential complications when designing a marketing campaign.
- ***Awareness:*** You can create brand awareness and awareness regarding your products and services. Display ads have a high reach and can be viewed by a large number of people.
- ***Tracking and measuring campaign results:*** Display advertising allows the tracking and control of basic metrics such as impressions, click-through rate for collecting digital data and tracking campaigns. It can record when and where a lead occurred and determine which types of ads work best for a particular demographic target group.
- ***Attention:*** The ability to incorporate high resolution images and motion graphics add to the appeal of the digital display.
- ***Customize payment methods:*** There are several different payment options for display campaigns. It is a great advantage to be able to choose the one that best suits your budget and goals.
- ***Adaptable for Mobile:*** Display advertising is compatible for mobile devices. It uses customization options to deliver personalized content.

The disadvantages can be listed as follows (Iley, 2016; Vapulus, 2018):

- ***Ad blockers:*** Ad blockers cause loss of banner impressions, conversions and sales by blocking ad impressions and can have a drastically negative impact on marketing campaigns.

- ***Low return:*** A lower click-through rate also means lower sales. When users see your ad, they may not be ready to buy because they are not actively searching for your products or services.
- ***Less competition:*** Display ads are not that competitive. It depends on Google for processing and transforming the image.
- ***Lack of reputation management:*** In display ads, the appearance of ads cannot always be controlled. This situation sometimes leads to very strange and even harmful situations for brands.
- ***Associating with spam:*** Display ads have a bad reputation as spammy annoyances and offer little value. Many internet users equate display ads with spam, especially ads that play automatically or force you to close to continue.

E-Mail Marketing

According to Lewis (2002), e-mail represents the culmination of a communication revolution that started with the telephone, which complements, increases and eventually changes natural one-to-one relationships with collective, manufactured, artificial one-to-one relationships.

Email marketing provides the following benefits to businesses (MacPherson, 2001):

- Email marketing provides direct communication with potential and existing customers.
- It provides interaction. E-mail encourages and facilitates direct and immediate interaction.
- It is low cost. E-mail can be extremely inexpensive on a per-piece cost or e-mail address basis, regardless of whether the sender is in purchase or storage mode.
- It creates the advantage of targeting qualified potential customers one on one.

In addition to the advantages listed above, e-mail, which can display full-color and graphics, even animation, video and sound, with its high-quality presentations, has the effect of television and radio in creating brand power (MacPherson, 2001).

Many people do not want to constantly receive e-mail. The fact that businesses send too much information e-mails causes consumers to squeeze and direct them to other companies. Most of the time, it is observed that the emails sent go to “spam” files and are less visible. An e-mail used to acquire customers also creates a spam load for customers. Record lists from third points can sometimes be both expensive and inefficient (Lewis, 2002). Despite these disadvantages of e-mails, it is frequently preferred by businesses because it has the opportunity to reach many more customers.

E-mail marketing is seen that businesses use this tool too much. For example, Uber offers a very clear message and brief information for subscribers who don’t have a lot of time just to review the posted messages. It offers detailed information and mapping about the journey by offering different promotions with the e-mails it sends. It also provides a link to consumers who want to learn more about promotions and notifications in posts (Watts, 2018). The company sends a welcome mail when you become a member of Starbucks or start using the mobile app. “*Welcome, you are now signed up to get the lastest news about Starbucks. We will keep in touch with initiatives, announcements, product offers and promotions*”. Thanks to the use of uncomplicated and visual features (such as logos, colors and fonts), it was clearly stated when the recipient will receive communication from Starbucks (Sailer, 2018).

One of the most important issues in e-mail marketing is to ensure that customers are informed about changes in the business. For example, changes in the team, a new partnership agreement, the acquisition or making of investments. As an example of this, EmaiMonks sends information about its new manager to its subscribers, informs about why they chose such a manager and who this manager is (Cetrefli, 2019).

Social Media Marketing

Technological developments have made social media an important building block in communication. Applications such as Facebook, Twitter, Instagram, LinkedIn attract attention as widely used digital tools both in social life and corporate life (Clement, 2020a). The popular structure of the World Wide Web is consisted of blogs, forums, business networks, photo sharing platforms, media sharing sites, social games, microblogs, chat applications, review sites, social bookmarking, voting sites and finally social networks (Clement, 2020b; Zarrella, 2010).

The social web and networks are the online places where people with common interests can come together to share thoughts, comments, and opinions. The social web is a new free media world created by individuals or organizations on the web (Weber, 2009). People use their online social connections to filter, discuss, disseminate and verify the news, entertainment, and products they choose to consume online and offline (Ryan & Jones, 2011). Social media marketing, also known as community-based marketing, is related to concepts such as word of mouth marketing, influence building, networking, virality, and personal communication (Bhatia, 2017).

According to Ryan and Jones (2011), the transition to social media is the most important development in digital marketing. Marketing must surround the social network, because the main thing that has changed in the social network is the media and marketing has always had to form around the media. Individuals and businesses in the world are becoming media thanks to social networks. The social web offers numerous opportunities to strengthen and expand a business's relationships with all internal and external customers. These opportunities (Weber, 2009):

- ***Targeted brand building:*** Podcasts, online chat sessions, and blogs created by senior executives can be used to build the organization's brand.
- ***Lead generation:*** By using the Web, it is possible to reach more people faster and more cost-effectively than traditional broadcast and print media and reach high target markets.
- ***Partnerships:*** Social media is an important tool to stay connected with existing and potential customers, as well as other business partners such as distribution channels, suppliers, technology providers, and manufacturers.
- ***Research and development:*** Social media can be used by businesses to gather information about their customers, competitors and environmental factors.
- ***Staff communications:*** Social web tools also offer numerous opportunities to strengthen and expand staff communication. For example, necessary business decisions can be communicated to employees collectively from a single source. Online groups can be created where the sales team shares their experience and advice such as WhatsApp groups or E-mail groups. Career networks such as LinkedIn can be used when a new staff member is needed.

When the reasons why businesses use and do not use social media are examined, the following results are encountered:

Nowadays, it provides important advantages for businesses to deliver product and service promotions to millions of people. It is thought to be a much more effective method than others. Because while search engines are valid for those who want to buy a product or service, social media has a significant impact on consumers in order to promote the product or service. Even if a consumer is not in mind to buy the product, he can buy the product he sees through social media. Consumers are now communicating through their social media. Because social media provides rapid communication. Therefore, when businesses want to reach consumers quickly, they prefer social media tools. First of all, businesses can learn the wants and needs of consumers through social media in a shorter time without reaching the market. They can also see the consumers' opinions about the business. Thus, businesses have the advantage of seeing their mistakes or deficiencies and correcting them. Whether consumers like a product or a service offered by businesses or not also arise with the likes and shares. Therefore, a simple analysis and measurement is realized in this way (Webtures, 2015).

The survey was made that Turkey in the business of social media provides how a business benefits of use has emerged following results: Contribute to the awareness of businesses actively use social media for business, the strengthening of investors' confidence in the company by the reduction of capital costs, improved financial flexibility, members of the company's products and through social media It provides many benefits such as influencing the opinions of other individuals towards its services. These benefits are reflected in financial performance indicators at the end of the day (Esen et al. 2020). In addition, San Sunguray (2020) revealed that businesses using a sincere language in their social media posts are effective in creating emotional bonds with consumers and reaching more people.

There are some practices that businesses should do on social media channels in order to provide all these advantages. For example, businesses that want to ensure effective communication on Twitter need to share more visual tweets. Because, according to the reviews, a visual tweet is 150% more retweets than the others. The same is true for videos. Video tweets are 28% more retweets. By using industry-related hashtags in their tweets, businesses have the opportunity to reach much more people, especially by choosing Trend Topic hashtags. A word in quotation marks shared about a celebrity or industry attracts 55% more attention from consumers. Using exclamation marks, numbers, "Please RT" words, tweets not too long (usually between 71-100 letters), tweeting generally between 13:00 and 15:00, adding more links to tweets to reach more followers ensure that the shares are more attractive and a higher level of interaction with consumers (Webtures, 2015).

In addition to all these advantages, the disadvantages faced by businesses regarding their use of social media are as follows: While consumers use social media to share their positive emotions, they also use it to share their negative emotions. When they share them, everyone can see a consumer's negative experience with the business. When faced with such a situation, the first factor that businesses should do is to respond to a negative comment immediately with care. Thus, the consumer will feel that he is taken into consideration and his negative attitude will change. Another disadvantage is opening up the potential for embarrassment. For example, sharing stories of victims of domestic violence with the hashtag "WhyIStayed" became a trend in social media in a very short time. DiGiorno Pizza also tweeted to take advantage of this trend with the hashtag "#WhyIStayed you had pizza". Within seconds, DiGiorno Pizza followers began to get angry and reflect this anger on their tweets. The business had not researched what this hashtag was about. The carelessness of the business caused negative judgments in the minds of the consumers in a very short time. Therefore, businesses should definitely research their posts on social media beforehand and create their content accordingly. Another disadvantage is not spending too long time and doing enough research on social media campaigns. Businesses should either create their own social media division or seek help from an outside social media company (www.webfx.com). Recruiting specialists on social media or sending your staff to training causes more costs for the business (www.nibusinessinfo.co.uk).

Chatbots

Chatbots are like a digital assistant that enables the individual to interact with digital devices as if communicating with a real person, answering the individual's questions like a human.

The term chatbot consists of "chat", meaning conversation and "bot", that is the abbreviation of the robot, and is defined as a computer program that can perceive natural language and provides a language interface that responds in natural language according to the user's request. (Rese et al. 2020). There are two main chatbots used today that work with natural language processing (NPL) and machine learning (ML) (www.oracle.com):

- **Task-oriented (declarative) chatbots** are single-purpose programs that focus on performing a single function. Their rule is to create automated, yet interactive responses to user queries using NLP and a little bit of ML. Interactions with these highly specific and structured chatbots are most commonly used in support and service functions (like sound thinking, interactive FAQs). These types of robots are the most used chatbots today.
- **Predictive (interactive) chatbots**, often called virtual assistants or digital assistants. It is much more advanced, interactive and personalized than task-oriented chatbots. These chatbots are context aware and use natural language understanding (NLU), NLP and ML to increase their learning as they continue to chat. They apply predictive intelligence and analytics to enable personalization based on user profiles and past user behavior. Examples of consumer-oriented, data-driven and predictive chatbots such as Apple's Siri and Amazon's Alexa.

These two basic chatbots work with six complementary dimensions consisting of type, direction, guidance, predictability, interaction style, and communication channel (Paikari & Van Der Hoek, 2018).

- **Type:** Chatbots serve different purposes within a business. ***Information chatbots*** can support employees by providing information about their work. ***Collaboration chatbots*** allow employees to work together in a coordinated manner. For example, employees can present information about their work to others. ***Automation chatbots*** can convey the changes in the topics employees are working on to others.
- **Direction:** ***Input chatbots*** need input to start the conversation. ***Output chatbots*** start the conversation without needing an input telling it what to do. ***Bi-directional chatbots*** are two-way chatbots that work both with and without input.
- **Guidance:** ***Human-mediate chatbots*** cannot execute the task alone, they definitely need an outside influence telling them how to do the next tasks. ***Autonomous chatbots,*** on the other hand, do their own work, collect information alone, and do not need anyone else.
- **Predictability:** ***Deterministic chatbots*** perform the same behavior to the same situations. They must be guided for the task. ***Evolving chatbots*** decide themselves how to solve which event, using past interactions and results. An example of this is the chatbot designed by Facebook, which becomes incomprehensible to humans after a certain period of time and the robots exhibit different behaviors alone. Therefore, there are some negative situations.

- **Interaction style:** ***Dull chatbots*** repeat the same sentences and interact using simple words. They are robots that work in line with the instructions used in recruiting employees. ***Alternate vocabulary chatbots*** are robots that perform shape changes using different words that have the same meaning. ***Relationship builder chatbots*** are robots that make jokes, plan the course of a chat, want to offer people fun experiences. ***Human-like chatbots*** learn to interact using conversations they have participated in before. They behave like people.
- **Communication channel*****: Text chatbots*** are robots that use only text and can interpret textual input and output. ***Voice chatbots*** are more friendly. Because they talk, they are more natural. There are also robots where ***text and voice*** are used together.

For example, when you search for a product on your computer, a window appears on your screen asking if you need help. Or you are communicating with a chatbot when you use your smartphone to get directions via online chat while going anywhere. In addition these, chatbots are often used for internal purposes such as training new employees and assisting all employees with routine activities, including annual leave scheduling, training, ordering computers and work supplies, and other self-service activities that require human intervention (www.oracle.com). Businesses offer corporate services by integrating chatbots on platforms such as Facebook Messenger and WhatsApp (Rese et al., 2020).

Especially, e-commerce sites are the businesses that use chatbots most recently. These businesses that want to provide better and more active services to their customers develop chatbots, which are artificial intelligence technologies, with data. Today's artificial intelligence studies cannot be considered separately from machine learning technique. E-commerce sites that offer live customer support encounter questions and problems that are repetitive and answered by a workforce of real people every day. By undertaking this routine workload of chatbots, they are able to provide responses and guidance to customers faster and more efficiently than a human consultant. It is seen that chatbots reduce the customer service costs of e-commerce sites and give e-commerce sites the ability to interact better with customers 24/7 (Paytryblog, 2019).

In a study conducted in Germany, it was aimed to examine the acceptance levels of chatbots of customers. For this, a chatbot named "Emma" has been developed and integrated into Facebook Messenger. According to the data collected from the Y generation, it has been determined that the conversation with Emma has positive effects on the customers in terms of reality perception, beneficial and enjoyable. However, there was a distrust of customers regarding privacy concerns. Therefore, the company carried out studies on customers' perception of insecurity and aimed to eliminate these perceptions (Rese et al., 2020).

Chatbots have advantages and disadvantages like other applications. The advantages of Chatbots, which offer great advantages to businesses in internal and external communication in businesses, can be classified as follows (CBOT, 2020; ChatCompose, 2020; Gómez, 2018; Sloan, 2018):

- ***Support Automation in Customer Service and Managing Multiple Customers:*** Chatbots can produce solutions to an unlimited number of customers at the same time and respond by understanding their needs. More than one consumer can be served at the same time.
- ***Immediateness:*** Chatbots instantly respond to consumers' questions without waiting.
- ***Reduced Costs:*** It can eliminate the need for labor. A layout and plane that can communicate with many consumers at the same time can be created. Using chatbots provides an advantage when trying to cut costs.

- ***Available 24/7:*** Chatbots can answer consumers' questions anywhere and anytime.
- ***Consistent Brand Image:*** Since chatbot messages are pre-programmed, deviations, fatigue or emotions will not be possible when answering questions.
- ***Increasing Company Revenues:*** Chatbots provide convenience during the data collection process as they provide instant data, and increase sales and revenues.

It is possible to list the disadvantages of chatbots as follows.(ChatCompose, 2020; Gómez, 2018; Sloan, 2018):

- Since the chatbot works in the form of pre-learning, there will be a possibility that the consumer will not understand a question immediately.
- There will be clogging. This situation may cause customer loss in the long run.
- It can be difficult to serve several customers at the same time, especially when chatbots update. Therefore, there will be times when it cannot provide good service to the customer.
- Each chatbot needs to be programmed differently for each business. Updating the program may also require additional costs.

For example, Garanti Bank in Turkey, has introduced a robot named Ugi. Especially when introducing Ugi, he mentions the importance he gives to human values. Along with this robot, Garanti Bank uses two technologies: natural language processing technology that understands and responds to questions conveyed by customers via voice and text, and biometrics technology that enables visual recognition and voice recognition while confirming that the customer is the right person within 3 seconds. Another example is given in Akbank in Turkey. It implemented the money transfer feature and face recognition feature with chatbot technology. Accordingly, customers can introduce themselves to the application with face recognition and perform money transfer transactions by texting with the Akbank Assistant (Kaya, 2019).

FUTURE RESEARCH DIRECTIONS

This study explains the new media channels that are theoretically used today in order to provide corporate communication and interaction with consumers. In this study where these new media or digital marketing channels are explained theoretically, it would be more appropriate to conduct empirical research to examine the subject in more detail. Some of these channels most used by corporations are given in this study. Future research can be made about how actively organizations use these channels, what applications they implement and what results they have achieved. Thus, more concrete data will be obtained. It is hoped that the study will serve as a resource for future studies and contribute to the literature in addition to the previous ones.

CONCLUSION

As a result of the development of technology, the changes that occur in communication and people trying to keep up with these developments in their environment have an impact on all areas of life. The world is changing and businesses are an important power of this change. With this power in businesses, especially marketing stands out as the function that should be adapted to change in the best possible way. Marketing, which is the gateway for businesses to the outside, has started to use communication tools that emerged with social networks, search engines, display ads and electronic communication with the digitalization that manifested itself with change, as well as using traditional communication tools. Unless businesses are in constant communication, both externally and internally, they must buckle under to their competitors in the globalized market.

Businesses actively use all digital tools in their own businesses, especially within the framework of institutionalization. While a business uses social media to achieve customer satisfaction and to gain new customers, it also uses it for corporate communication. In addition, it can establish social networks to increase corporate performance, and can monitor the status of its business within the framework of consumers on Twitter. Moreover, while businesses can use e-mail applications to communicate with their personnel in line with institutionalization, they can also use them to introduce their new products to their customers. They can make affiliate marketing applications in order to do joint business with display advertising studies. In order to increase their brand visibility and awareness, they can be seen by both customers and employees by doing search engine studies. Finally, digital marketing tools are widely used to gain competitive advantage in branding and awareness studies of businesses.

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KEY TERMS AND DEFINITIONS

Digital Marketing: It refers to the preparation and presentation of all marketing activities that businesses carry out, such as communicating with consumers, conveying messages to them, informing and persuading them.

Display Advertising: Display advertising, which differs from traditional advertisements due to its measurability and sustainability, is advertisements that do not tire the consumer, do not obstruct the general appearance of content such as websites, social networks or blogs, target a specific audience and are generally created for marketing, sales and communication purposes.

E-Mail Marketing: E-mail marketing, which develops with Web 2.0, is a new generation marketing method that is used as a direct marketing tool to deliver the marketing messages of electronic mail to a certain audience and constitutes a sub-category of digital marketing.

New Media: Unlike traditional media channels, it refers to the media tools that corporations use to communicate with their target audience using internet technologies.

Online Public Relations: Online public relations are the communication method that emerges as a result of the transfer of traditional public relations to digital environments, using tools such as blogs, social media, online press releases, and search engine optimization.

Search Engine Marketing: It is one of the digital marketing methods that increase the awareness and visibility of the website with the ads they give to the search engines by the businesses that aim to appear in the top positions in the search engines.

Search Engine Optimization: SEO is the improvement and optimization processes carried out with these improvements in order to be found at all times, providing faster and easier scanning for the results of the websites tried to be found by people in search engines.

Social Media Marketing: Social Media marketing is all marketing strategies made on social media platforms where the promotion, advertisement, and brand awareness of a product or service are carried out on social media networks.

Chapter 2
Social Media and Career Building:
Creating Online Portfolios and Personal Brands

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ABSTRACT

Brands add value to the products or services they represent. Consumers distinguish products or services from others through brands and impose meaning on products and services. Currently, individuals are brands and trying to get the attention of others. In a process called personal branding, individuals promote themselves and make them a brand. One of the most important factors that makes it easier for individuals is social media. Social media allows users to create their own profiles, open their own channels and share content, making ordinary individuals visible and effective. Individuals make great strides for their careers by creating their own brands in these platforms of their own.

INTRODUCTION

Branding began to increase its popularity from the beginning of the twentieth century (Moore & Reid, 2008). So much so that brands have become more important than products over time. With branding seen as "soft power", consumers can differentiate the product and service from others and can attribute value, meaning and necessity to a product or service (Kaputa, 2005; Roper & Parker, 2006). It also does this by affecting the individual's feelings. The consumer can act on the basis of the meaning and values that the brand adds to the product. Another benefit of the brand is that it promises a consistency that reduces risks for the consumer (Khamis, Ang & Welling, 2016) and set a standard.

The values added by the brand are the same for individuals and the product. What needs to be done here is to use elements such as strategy, images, reputation to attract people (Kaputa, 2005). When viewed from this aspect, personal branding is quite similar to product branding. Activities that individuals do

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to make themselves known in the market are personal branding activities (Lair et al., 2005; Shepherd, 2005). Successful personal branding involves effectively managing how others perceive you (Rampersad, 2008, p.34). With successful personal branding, it is possible to have stronger effects on others and a more positive perceived brand value.

A similar concept, individual branding, was first used in 1980, in the book "Positioning: The Battle for your Mind." Reis and Trout emphasize in their book "Positioning: The Battle for your Mind" that individuals can improve themselves and their careers through positioning strategies. The popularization of the concept has been through the article "The Brand Call You" (Khedher, 2014, p.31). Kotler and Levy have also put opinions that people can be marketed or branded. Personal marketing is a kind of human activity; it can be practiced by an employee trying to influence his boss, or by a politician trying to win public support (Kotler & Levy, 1969 cited in Slind & Urbanova, 2016). Concepts such as personal branding and personal promotion also emerged in the late 1990s (Gandini, 2016, p. 21). Personal branding is an activity in which individuals present themselves to influence others and create market value. In this study, individuals who brand themselves successfully will be briefly discussed and the definition and characteristics of personal branding will be stated to those who want to brand themselves in a similar way. After that, a road map will be presented. Given the role of social media, individuals will be given suggestions on how to brand themselves on social media. It is believed that these recommendations will be useful, especially for employees of the corporations and for the CEO and managers of the corporations.

PERSONAL BRANDING

Definitions

Personal branding is defined as; "process of developing, harnessing and classifying personal information and providing a comprehensive narrative for others to easily understand one's identity" (Jacobson, 2020, p. 1). It is the use of market strategies by individuals to introduce themselves to others (Khedher, 2014). The individualistic nature of the personal brand is rooted in American culture in historical context and is also associated with neoliberal economic philosophy (Lair et al., 2005). According to another definition, personal branding is; "effort made by individuals to create awareness and visibility of their persona among a target audience, which enables them to stand out from the crowd and gain personal or professional success." (Slind & Urbanova, 2016, p. 15). Personal branding is a mix of "reputation, style, look, attitude and skill" (Wright, 2009, p. 6). Individual unique aspects, value, personality, abilities are presented through the personal brand (Montoya & Vandehey, 2009, pp. 4–5). Personal branding does not consist of instantaneous behavior. You should not see the personal brand as big steps in series. Personal branding is a perpetual stream of small little efforts (Leland, 2016). Personal branding should not be seen as a celebrity-only concept. Everyone has a personal brand, whether aware or not, managed or not.

Everyone Has a Personal Brand

Personal branding is a practicable activity for anyone who wants to promote themselves, showcase what they do well (Petruca, 2016). It is also practiced by ordinary people who predict the power of modern technologies (Khamis et al., 2016). Nevertheless, although the idea that anyone can have a brand is being advocated, most individuals may not be aware of the importance of managing the personal brand. If an individual does not manage their own brand, some can do it for them, positively or negatively (Khedher, 2014, p. 32; Shepherd, 2005). Therefore, they can influence the individual's brand before the individual.

Each individual has a brand. Individuals' interactions with their social environment also build an individual's personal brand (McNally & Speak, 2010, p. 7). These interactions can occur face-to-face or online. In addition, the individual's personal brand is created by his abilities and lifestyle (Hearn, 2008). The personal brand, on the other hand, is the sum of these values and qualities (Gad & Rosencreutz, 2002). Individuals should pay attention to the control of their own brands and have a memorable and dynamic image in the market. Because branding is no longer just a suggestion, it is a necessity. This is our most important business in today's business World (Peters, 1997). Besides, the individuals must know their skills and characteristics and be able to sell it (Brems et al., 2016). The individual can easily sell their objective and discernible tangible skills. These include examples such as education, experience, location, memberships. Intangible skills are more subjective; such as an individual's "team leadership abilities, level of motivation, previous workplace status" (J. Evans, 2017, p. 294). Such subjective abilities separate the individual from the crowd and provide new opportunities and competitive advantage (Kaputa, 2005, p. 16). Because there is an environment out there where the competition is quite intense. Many competitors compete for a small number of career and job opportunities. Therefore, everyone should strive to make himself the most advantageous. Abilities and the presentation of these abilities to others will give an advantage to the individual. But personal branding, defined as perpetual efforts, consists of some stages.

Stages of Personal Branding

PIn researches, there are different points for these stages and steps. Khedher (2013) divides personal branding into three stages: creating brand identity, ensuring brand communication, and evaluating the results of the personal branding process. Another study involves evaluating the individual himself/herself at the first step of the personal branding process. He/she has to be honest with himself/herself. Then he/she should examine what are the trends in the market he/she is targeting. Therefore, he/she can draw a path for himself/herself. In this process, the individual must determine his/her strengths and weaknesses. Keeping the brand continuously updated will ensure the continuity of the brand (J. Evans, 2017, p. 296). Some more steps can be followed in the process of creating personal brands. At the first step of this process, the vision, mission and values for the brand should be established. In this way, a path is drawn to the brand. At the next stage, whoever the brand wants to reach should be selected and the planning of the process should be done accordingly by analyzing the target audience. As brands can engage in many activities, both online and offline activities should be organized. In the last step, relationships should be built and controlled with both brands and the target audience (Patel & Agius, 2014). These steps will allow the personal brand to achieve its goals more easily and quickly. Also, the brand will be able to gain a more professional look. Therefore, the perceptions of others will be managed more successfully.

It's All about Perception

The way others perceive you is your personal brand (Montoya & Vandehey, 2009, p. 6). Therefore, for successful personal branding, the individuals must take control of these perceptions. Because everyone has a brand, it will be possible to control the perception of individuals by managing the personal brand "strategically, consistently and effectively" (Rampersad, 2008, p. 34). Personal branding is the perception in the minds of others (Vitberg, 2009). It is also possible to change this perception. This control over the message contained in personal branding is seen as having the power to influence the perceptions of the target audience (Slaughter, 2015, p. 34). However, in this process, it is more important than the messages that the individual sends, what others understand from these messages. The personal brand is based on the meaning and perception derived from these messages (McNally & Speak, 2010). Moreover, personal branding is related to expectations of the audience towards the individual (Rampersad, 2008). Managing these expectations and perceptions well will ensure that the brand is also well managed. The brand perceived as unique will be more valuable to the target audience.

Target

In personal branding, the individual presents its self to others through marketing efforts, mostly positive aspects (Marwick, 2013, p. 194; Sills, 2008), distinguishes itself from others and stands out from its competitors (Kaputa, 2005) and makes itself more attractive by managing its brand (Khedher, 2013; Khedher, 2015). A personal brand can be supported by careful management of the target audience and consistent presentation (Marwick, 2013). This presentation actually includes promises for personal brands. It tells those who interact with you what to expect from you (Montoya & Vandehey, 2009). Because personal branding makes this created image visible to others (Marwick, 2013). Creating this image in a professional way will benefit the individual by focusing these elements: consistency, creativity, remembrance, credibility. In addition, individuals must live the identity and image they create in their real life. If others trust the brand created by the individual and the brand manages to stay in mind, now the image of the brand will be able to attract the target audience to the brand. Of course, this process is not spontaneous. There are some strategies that the individual should follow.

Strategies

Personal brands are divided not as good and bad, but as strong and weak. According to Arruda (2009) a strong brand, whether personal or corporate, has three main characteristics: openness, consistency and stability. If brand is strong, consumers have no difficulty perceiving the distinctive aspect and value of the brand. If brand is weak, this is more difficult (McNally & Speak, 2010, p. 27). Personal brands must conduct SWOT analysis to find their strengths and weaknesses. In this analysis, individuals examine “strengths and weaknesses in their inner environment and opportunities and threats in the outer environment” (Rampersad, 2008, p. 69). After these evaluations, individuals will be able to identify their brands.

Only a personal image (Montoya & Vandehey, 2009). In this way, personal branding strategies;

ffectively promoting techniques of synthetic personalization back into personal relationships. Someone whose personal brand involves being calm or humorous is thus expected to consistently project calmness or humor in all their relationships if their brand is to be a strong one (Wee & Brooks, 2010, p. 53).

These strategies are about how people perceive the brand and how an individual can change that perception (Gander, 2014). Perceptions that can be managed through brand-oriented strategies include some elements. In this context, McNally and Speak also (2002 cited in Baltezarević & Milovanovic, 2014, p. 6) underlines three important elements for personal brands: competencies, standards and style. Competence is the ability of an individual to meet basic expectations. Standards will arise if the individual consistently communicate these competencies to others. The brand impression in the mind of the target audience will form its style.

TFurthermore, there may be some misconceptions about personal branding. At this point, some highlights may resolve any confusion that may arise. First, "branding takes time", and if the brand does not gain confidence from its target audience, it will not become memorable. A brand owner may need to make a long-term effort. Second, "brands grow organically" and can grow into a thriving plant with its roots over time. Third, "brands are not rational" and can be created on emotions. Rationality doesn't always come into play. If the target audience has positive feelings for the brand, they can trust the brand without looking at anything else. Fourth, "brands want a firm commitment" and the brand owner must perpetually deal with the brand. Finally, "branding always has an effect" and will have a result, whether desired or not (Montoya & Vandehey, 2009, pp. 15–16).

It would be useful to discuss personal branding through an example before moving on to personal branding, career development and suggestions on social media. Personal branding will be better understood through the impact of managers and CEOs branding themselves for both themselves and their corporations.

CEO Branding and Impact on Corporations

The CEO or managers represent the external face of the corporation and therefore influence the value of the corporation (Erdoğan & Esen, 2018). Corporation stakeholders are impressed by the positive reputation of the CEO. CEOs serve as strategic resources for the competitive advantage that the corporation wants to achieve (Conte, 2018). People rely more on the big names who run the corporation than the corporations. The behavior and rhetoric of CEOs may have more influence over others than the corporation itself. So, the manager's or CEO's brand is highly influential on the corporation (Chen & Chung, 2017, p.24). CEOs and managers give vision to corporations and guide them to the future. They bring passion to their employees (Chen & Chung, 2017). The reputation and brand of CEOs affects how the corporation is perceived and evaluated by both internal and external stakeholders (Gaines-Ross, 2000, p.366). CEOs need to be able to act in accordance with new expectations and demands (Gaines-Ross, 2000). Personal branding is an important response to these demands. CEOs' personal brands contain elements such as "personal characteristics, values, competencies, leadership" (Chen & Chung, 2017, p.25). The CEO builds his personal brand by considering the needs and expectations of stakeholders. In this way, the personal brand that it has created becomes representative of the corporation (Erdoğan & Esen, 2018). Corporations that contain the most requested and brand CEOs are seen by investors as more remarkable and investable. Personal brands of CEO's can strengthen the image, make it easier for startups in intense competition to convince investors. Many names, such as Mark Zuckerberg, Jeff Bezos, both work in senior positions at their corporations and present themselves to others by branding themselves (Fetscherin, 2015, p.22).

Individuals' personal brands provide them with more income, reputation, and advantages, while managers' personal brands have similar effects on corporations. Even this effect is higher in some cases (Chen & Chung, 2017, p.24). Also, organizational reputation is influenced by the communication behavior of CEOs (Conte, 2018, p.57). CEOs 'relationships with the media and media support for them, how they manage their impression, influence CEOs' reputation (Sinha, Inkson, & Barker, 2012). Media is an important tool in managing and directing people's perceptions. CEOs will also be able to present themselves more effectively to their stakeholders and others if they take effective advantage of these tools (Ranft, Zinko, Ferris & Buckley, 2006). One of the most important platform for this today is social media.

CEOs also have effects such as an increase in the financial performance and profits of the corporation, retention of employees, and the market's reliance on them. Steve Jobs' resigning to Apple has also helped Apple gain strength through its image and reputation (Fetscherin, 2015, p.22).

Although the personal brand is influenced by appearance, sometimes with a basic Jean, sneakers and black T-shirt, the individual can make himself a brand. This brand affects the reputation and perceptions of its corporation, or the profits they make. The name that comes to mind when it comes to Tesla is undoubtedly Elon Musk. Musk has branded himself so much that he is even more known than the corporation itself. Musk, who is often known for his unlimited vision, innovative personality, is one of the most important examples of CEO Brands. He brands himself and his corporation not only with the work he does correctly, but also with the mistakes he makes. According to him, not making mistakes is not making innovative attempts. He also successfully uses social media to create "stories". He shares information with his new products, gets opinions from others for product names, sometimes creating fun by making jokes. Even those who have never been interested in technology have somehow heard of Musk's name. But sometimes social media can destroy this wonderful brand. Musk's misusing social media during the "Thai cave rescue" days caused eyebrows to raise and his personal brand was damaged. As a result, his emotional synergy with people has decreased. For this reason, there are many issues that all users, including Musk, should pay attention to when creating their personal brands. Therefore, it will be useful to present important issues and suggestions related to personal branding on social media.

PERSONAL BRANDING AND SOCIAL MEDIA

Today, many tools are available for personal branding. Blogs, websites, printed sources, and many media are useful for personal branding (Slaughter, 2015, p. 34). Surely, the most important of these tools is social media. Social media has also made personal branding an important marketing task for ordinary people (Shepherd, 2005). The emergence and spread of social media has further increased the importance of personal branding behaviors (Labrecque et al., 2011). For individuals expanding their networks, personal branding has become common in both social life and professional life (Gandini, 2016). But the uncontrollable nature of social media sometimes causes unwanted perceptions to be created (McNally & Speak, 2010). There are two types of effects: "the effects that occur with the flow under the control of the individual and the effects that come with the flow under the control of others" (J. Evans, 2017, p. 294). The inability to control the shares that others can make for the brand can negate these effects.

In social media individuals were easily able to share content in their profiles. In addition, users are not required to have high-level skills and knowledge for such behavior (Labrecque et al., 2011). Without these features, personal branding will be quite difficult (Labrecque et al., 2011). Social media has given individuals the ability to present themselves as brands. Users now have their own followers (Brems et al., 2016). Users who share on social media as amateurs have become more popular than individuals who are traditionally famous through personal branding (Slind & Urbanova, 2016) and are able to build a "professional showcase" of their own with their brands (Rangarajan et al., 2017, p. 659). Individuals can present their own knowledge and abilities, career processes, to their social circle by creating their own stories (Johnson, 2017, p. 23). In this process, individuals have become curators. They try to promote themselves and their brands with the content they choose. Brands can be seen as a built-in version of individuals' lifestyles for others (Gandini, 2016, p. 21; Jacobson, 2020).

In social media, personal brands are created in three ways: create a brand, apply a brand, and maintain a brand (Tarnovskaya, 2017a, p. 33).

In the first stage of building the personal brand, it is essential for the person in question to have a clear brand profile and stay loyal to it.

In the second stage of enforcing the personal brand, it is essential to promote it via multiple social media accounts to increase the visibility of the individual brands in question.

In the third stage of maintaining the personal brand, it is essential to develop and maintain close and personal interactions with the audience to encourage the co-creation of new content.

Social media has influenced personal marketing and branding as well as many areas. Along with these developments, a distinction has emerged in the form of analog and digital personal marketing (Vitberg, 2009, p. 11):

Table 1. Classification of personal brand tactics

Analog Personal Branding Tactics	Digital Personal Branding Tactics
Build personal relationships	Podcast
Speaking engagements	Web sites
Articles, white papers	Blogs, wikis
Brochures, business letters	Social media
Public relations	E-mails

Source: Vitberg, 2009, p.11

We emphasized that digital tactics are more common today, and social media is the most important. The ease of sharing provided by social media brings the possibilities of self-presentation, which constitute an important part of personal branding (Labrecque et al., 2011). Self-presentation behavior is the use of advertising and marketing strategies to sell oneself and the ability of individuals to choose their own brand (Marwick, 2013, pp. 191–192). Individuals are able to make their share with a more positive presentation under their control (Thoumrungroje, 2014). This control covers many elements from clothes, activities, close friends (Gravison, 2017, p. 23). It is the Web 2.0 culture that develops an understanding of the "entrepreneurial self" with such possibilities and promotes this behavior (Marwick, 2013). In this context, personal branding is an art in which impression management is applied (Shuker, 2010). Users try to get positive feedback and an increase in the number of followers. An excess in the number of followers of an individual is perceived in most cases that the individual and his brand will be more effective and visible (Jin & Phua, 2014). The fact that shares and content are related to the audience targeted by the individual increases interactions such as likes, followers, and comments (Gensler et al., 2013). Personal brands are created as identities by considering the demands of the target audience. These identities are intended for economic or social gain in personal branding (Page, 2012, p. 182). Although finding a job and earning income is the goal of personal branding, people also create their own brand for purposes such as building friends or expressing themselves (Shepherd, 2005). Nevertheless, this study focused more on goals such as finding a job and developing a career.

CAREER

One common behavior in the knowledge economy, conceptualized many years ago, is to create professional networks. Through these networks, it is possible to gain advantages in the business market (Gandini, 2016, p. 20). Finding a job and managing career processes requires developing and managing networks (Khedher, 2013, p. 1). Among the important concepts that make this new economy obvious are globalization and technological innovations. Developments have also led to a continuous change in work life, an increase in job seekers and job replacements. The nature of many jobs is also changing. New ways of thinking and abilities are needed (Khedher, 2013, p. 1). The rise of project-based and entrepreneurial work and the spread of the internet have been a response to changes (Marwick, 2013, p. 165). Therefore, people have a need to introduce themselves professionally in this competitive market (Brooks & Anumudu, 2016). Individuals have taken advantage of personal brands to survive (Karaduman, 2013). Thus, quality can be separated from the ordinary (Marwick, 2013). The individual creates an identity in which he or she can influence its potential employer.

Employees have many similar characteristics and often meet their job qualifications at similar levels. In this case, their social and cultural capital becomes important. Individuals with the advantage of social and cultural capital stand out more (Lair et al., 2005; Wee & Brooks, 2010). In today's business world, although individuals get high grades in schools and participate in many activities that will improve themselves, it is difficult to get the job of dreams. Because there are many competitors (Brooks & Anumudu, 2016). More effort is required to succeed in competition and struggle (Khedher, 2013; Vitelar, 2013, p. 259). Increasing uncertainties are other challenges that an individual has to deal with (Lair et al., 2005). Being able to stand out in a business environment is seen as an individual issue rather than corporate efforts (Lair et al., 2005). As a result of these, the individual must emphasize his own uniqueness and differentiate from others (Shepherd, 2005; Vitelar, 2013, p. 259).

From these perspectives, personal branding is "a technique that an individual uses to increase their social capital in order to adapt to the changing labor market" (Gehl, 2011, p. 4). Individuals seeking employment with personal branding can market themselves as a market-oriented product (J. R. Evans, 2009; Lair et al., 2005; Sills, 2008). The individuals commodify themselves (Lair et al., 2005). They do this by creating a promise for their original aspects and presenting it to consumers (Arruda & Dixson, 2007). Individuals who can market themselves can get benefits, both socially and professionally (Minor-Cooley & Parks-Yancy, 2020). Personal branding is one of the most innovative and effective methods to achieve success (Arruda & Dixson, 2007, p. 25). It is an important key to long-term career success (Slind & Urbanova, 2016). They are consistent communication mechanisms that will enable empowerment in business or all other efforts (Arruda, 2009). Personal brand is decisive in obtaining opportunities (Montoya & Vandehey, 2009). In personal branding, individuals do not just sell himself themselves. They also sell many elements, such as education and experiences. These are all changeable elements, and therefore brands can also change over time and affect the potential for success (T. M. Evans et al., 2017, p. 123). In some cases, success is seen as money and fame (Kaputa, 2005, p. 2). The strong and positive brand increases the possibilities for these achievements. An individual's reputation can increase and more easily affect potential employers in the job market. In some cases, employers can find the individual themselves (Wright, 2009, p. 8). From this point of view, it is possible to talk about personal brands as a portfolio or CV.

People who check the brand can learn an individual's talent and experience. So this personal brand needs to be managed effectively (Gander, 2014). The personal brand reveals a portfolio of the individual's abilities and creates a first impression by presenting it in its interactions with others (Morgan, 2011). It has a central importance in evaluation and employment, especially for creative professionals (Neff et al., 2005). These employees constantly network and self-promote and look for ways to succeed in the new economy (Scolere, 2019). Although there are many professional platforms that can be used when designing portfolios, social media platforms are also quite widely used. In this way, there is a 4W concept for the impact of the personal brand on the business market. These include: answers to questions about who you are, what impact you want to have, where you want to be, and what you want to do (T. M. Evans et al., 2017, pp. 121–122). Answers to these questions will create relationships between the personal brand and the business market. Since almost everyone, including the CEO and employees, needs to manage their personal brands, the solutions that can be offered will be supportive in this brand-market relation.

SOLUTIONS AND RECOMMENDATIONS

For personal branding, the individual must have a passion. The brand is built on these passions (Deckers & Lacy, 2017). In this process, the individual can talk about him/herself and his/her passions. The individual must devote him/herself to these passions and his/her brand. Because the process is about the individual him/herself and his/her future. For this purpose, it should also take an active role, not a passive one, and make efforts (Kaputa, 2005, p. 9). Dedication and effort involve a long-term process. "You may have to hit a thousand times to break a rock. But it is not the thousandth hit that breaks the rock, but the thousandth hit that comes after the previous nine hundred and ninety-nine hit" (Deckers & Lacy, 2017, p. 16). The first hit is at least as important as the thousandth hit. Because you have to start somewhere. Creating a personal brand is not a one-off act (Rampersad, 2008). This process also includes the universal goals and steps of personal branding (Deckers & Lacy, 2017, pp. 10–15): "explore your passions, be bold, tell your story, create relationships, take action". A person who discovers his passions, tells them to someone, and communicates strongly will create his personal brand more successfully.

efore developing a successful personal brand, individuals must decide what they want. It needs to think about "who it is, where it is now, and what it wants to do in his career" (Kaputa, 2005, p. 10). Three stages are often mentioned in this process: extract, express, and exude (Arruda & Dixson, 2007, p. 29). At the first stage, the following recommendations can be applied:

- *Know yourself to grow yourself*
- *Remember, it's what they think that counts*
- *Define your brand community*
- *Tell your brand story*

In the second stage, the following can be applied:

- *Create your career-marketing tools*
- *Express yourself*
- *Assess your online identity*
- *Build your brand in bits and bytes*

At the last stage, the recommendations are as follows:

- *Be on-brand in all that you do*
- *Get a visual identity*
- *Increase your career karma*

There are many suggestions for building a strong personal brand. These recommendations are put together in a study (Poeppelman & Blacksmith, 2014, pp. 115–116):

Begin with introspection: It's important to understand that the first step in developing and maintaining a brand is self-reflection and evaluation

Conduct a brand audit: The next step to building a strong brand is to conduct an audit of your current brand

Develop and communicate your identity as an I-O psychologist: This next step requires you to think about how you want others to perceive your identity

Determine your audience: While developing your brand, think about whom it is you are speaking to at that moment

Ensure your brand as an I-O psychologist is aligned with SIOP's brand: If one is going to represent him or herself as an I-O psychologist, it is important to keep in mind the mission and strategy of the field at large

If an individual wants to succeed in personal branding, they must create a brand that is believable, different from others, and desirable (Evans, 2017). Given that the individual is unique and has unique characteristics, the individual should use these values as a tool for its personal brand in the potential market (Evans, 2017; Kaputa, 2005). An original and holistic brand can also provide a better life satisfaction for the individual if it is based on the individual's dreams and passions (Rampersad, 2008). The question at the heart of personal branding is "what makes you special?" (Philbrick & Cleveland, 2015, p.181). However, it is also necessary to convey this difference and originality to the target audience.

FUTURE RESEARCH DIRECTIONS

This conceptual work, which brings together personal branding issues that increase their importance more and more with the spread of social media platforms, reveals the role of personal brands in career development and success. The recommendations aim to explain how to make unique personal brands step by step. Ordinary individuals can become celebrities through accounts they create on social media. In their business life, they can achieve career progress with the brands they create. In addition, the brand itself can become a business. Brands created in accordance with their target audience can achieve the commitment of the audience and become important figures in areas that are the subject of the brand. It will be able to bring average employees to better jobs, while CEOs and managers will be able to raise them together with their corporations. Subsequent research can investigate the impact of social media accounts created as a personal brand on users, corporation managers, stakeholders and consumers. Research on followers of users who identify themselves as brands will be able to reveal the distribution of fake accounts and real accounts. Why other users and corporations work with personal brands and what benefits they get after collaborations are also among the issues that can be examined.

CONCLUSION

In addition to professional users, personal branding is also an important business for amateur individuals on social media. Because individuals show their personal performance and distinguish themselves and their brands from others (Chen, 2013, p. 334). Social media allows users to promote their own brands through their channels and accounts (Tarnovskaya, 2017b). Personal branding is possible for anyone who has access to social media. Individuals position themselves as brands and become famous. By taking the place of TV stars, users like vloggers, bloggers, Instagram celebrities come to the fore (Chahal, 2016). Because brands are now abandoning traditional advertising techniques. It uses micro celebrities or influencers that have branded themselves on social media in the promotion of products and services (Abidin, 2016). However, individuals need to strive if they have goals to bring themselves and their brands to this level. It should share in a consistent and continuous way for the audience it has determined. Even if an individual does not want to be a micro celebrity or influencer, they can use personal branding to achieve success in what they do. Because today, such platforms function as a portfolio and in some cases bring the work to your feet. Such behavior is vital today, especially for employees such as new media workers or freelancers. If the individual wants to take part in the market, a CEO who wants to increase corporation value, it must first make itself a brand. Because their opponents will do it.

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KEY TERMS AND DEFINITIONS

Authenticity: It is the individual's unique characteristics and differences that distinguish him from others.

Blogs: These are spaces where a person can create a profile on internet-based platforms and share it with others by writing daily texts on certain topics.

Branding: Planned promotional activities that enable consumers to distinguish products and services from others and attribute value.

Content Marketing: It is the process of conducting marketing activities by creating and sharing content for the target audience online.

Entrepreneurship: In a certain area of investment and business, it is to create a business for the purpose of making a profit by taking risk.

Personal Branding: These are narratives that an individual creates by building himself like a brand to make an impact on others.

Self-promoting: It is a way of presenting and "selling" the individual himself consciously by emphasizing his positive aspects.

Section 2
Corporate Communication Strategies

Chapter 3
Managing Corporate Terminology as an Internationalization Strategy:
An Overview

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ABSTRACT

The internationalization of economy has become a major focus in the world today. Different tasks can be carried out for the sake of internationalization, such as corporate terminology management, which ensures that the correct terms are consistently used within the company, in line with set goals. However, many enterprises do not invest in managing their terminology, which can lead to a wide range of problems. This chapter describes a general framework for managing terminology in commercial settings. The steps include (1) corpus preparation and compilation, (2) term extraction, (3) conceptual analysis, (4) identification of equivalents, and (5) representation and storage in terminology management systems. The results showed that corporate terminology management is viable, thanks to this procedure, which obviously benefits from the participation of a linguist.

INTRODUCTION

The internationalization of economy has become a major focus (Gutiérrez-Artacho & Olvera-Lobo 2017), namely in crisis scenarios, when companies need to maintain or even increase their production for a larger audience. Different tasks can be carried out for the sake of internationalization, which mostly entail the translation of company documents and information to other languages (e.g., the localization and transcreation of websites, the creation of subsidiaries abroad, etc.). Of these actions, the management of corporate terminology has a central role since terminology is a key factor in knowledge transfer and business communication. Therefore, corporate terminology should first be effectively managed in the

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source language of the company and then established in one or more target languages. This terminology management aims at ensuring that the correct terms are consistently used within the company in line with set goals. Properly managing company terminology results in a reduction of production costs and improves customer relationships and the corporate image of the company (Cerrella Bauer 2015).

However, many companies do not invest in terminology management (Warburton 2015). This can lead to a wide range of problems, such as terminology inconsistency (use of terms that do not necessarily convey the desired corporate image), lack of explanation of certain terms or abbreviations, use of terms that have negative connotations, or even of terms that can hinder information retrieval. Evidently, this is often detrimental to the corporate image and can even result in the costly misuse of company products.

This chapter discusses terminology management as a new corporate communication strategy for companies that have not as yet begun to manage their terminology. Therefore, our goal was to develop a general framework for managing terminology in commercial settings. To illustrate this proposal, the process was applied to a fictitious wind power company based in a Spanish-speaking country. The steps described include: (i) corpus preparation and compilation; (ii) term extraction; (iii) conceptual analysis; (iv) identification of equivalents; and (v) representation and storage in terminology management systems.

The rest of this article is organized as follows. The Terminology Management section focuses on terminology management in different settings. Then, the Managing Corporate Terminology section describes a step-by-step proposal of corporate terminology management applied to a fictitious wind power company. Finally, in the Conclusion section, a comprehensive picture of the study is provided.

TERMINOLOGY MANAGEMENT

Terminology management aims at ensuring that the correct terms are used consistently throughout a company, an organization, or a translation or terminology project. As for business and corporations, terminology management has a positive impact on their internationalization strategy. Its benefits range from effective communication to the reinforcement of the brand name, as well as improved translations, cost reduction, and enhancement of customer relations, among many others (Bowker 2015; Cerrella Bauer 2015). Warburton (2015) also adds that terminology management improves content retrievability in search engines and facilitates the use of content management systems. She also highlights the advantages of terminology management systems for almost any natural language processing system (Warburton 2015: 366-367).

In contrast, failure to manage terminology could hinder communication, create confusion, damage a company's image, lower translator productivity, or even result in legal issues (Bowker 2015: 306). For instance, the lack of terminology management could result in the use of terms that are not promoted by the company (e.g., terms that hinder information retrieval or do not convey the brand name and corporate image) as well as cause term inconsistencies (e.g., variable capitalization or hyphenation). However, many enterprises do not invest in managing their terminology (Cerrella Bauer 2015; Warburton 2015). Most often, staff and managers may not understand what terminology management involves, and thus not acknowledge the need to implement it (Cerrella Bauer 2015: 326). Increasingly, the good business sense of managing terminology is illustrated in different studies, which investigate the time invested in term record creation in comparison to the time devoted to term searches during translation (Champagne 2004), or compare the costs of creating term records with the consequences of not doing so (Childress 2007), among other aspects.

The following sections focus on corporate terminology management. Nevertheless, terminology is also addressed in other settings, specifically as part of translation or terminology projects. These scenarios are relevant to corporate terminology management since much of their work can be applied to companies.

Terminologists, who are professionals par excellence in terminology management, usually follow the traditional notion of *term* as the denomination of a specialized concept. They gather terminological information in glossaries or terminology management systems, such as termbases, which facilitate the storage and retrieval of terminological information. Term selection is often carried out from scratch (i.e., from domain texts) or by means of monolingual or bilingual term extraction systems, which permit the creation of preliminary term entries. These systems automatically identify all the potential terms in a document or corpus and present a list of term candidates to the user for verification. They often use frequency- and recurrence-based techniques, part-of-speech and pattern-based techniques, corpus comparison techniques, and various combinations of these (Bowker 2015: 310). Evidently, these lists should be checked to avoid noise, silence, as well as possible mistakes.

Term entries created by terminologists are fine-grained. They usually include term equivalents in different languages, definitions found in terminological resources or crafted by the terminologists, information on variation (i.e., synonymy, polysemy), usage contexts, observations, images, references, etc. These entries must be constantly checked to add new terms, remove obsolete ones, and update definitions, *inter alia*. This type of work relies on an in-depth analysis of the underlying conceptual system. This entails identifying the concepts of the domain and how they interrelate with each other.

As for translators, they do not manage terminology in exactly the same way as terminologists. They perform terminological work in every translation project, regardless of the subject, since their notion of *term* is not limited to the designations of specialized concepts. Therefore, not only do they gather the terminology present in scientific or technical texts (which have a high volume of technical terms), but also general units or expressions that may be of interest in future projects. Additionally, they usually collect words or expressions that are difficult to write, because they can insert them by the one-click function that is often available in translation environment systems (Bowker 2015).

For that purpose, they include the information in glossaries or terminology management systems. The terms, words, and phrases in question can be selected either from the source text or with bilingual term extraction systems, which are often included in computer-assisted translation tools. Although the preliminary entries thus created need to be checked, Kageura & Marshman (2019) highlight the fact that they save time and avoid transcription errors. However, they also acknowledge that the term extraction systems in computer-assisted translation tools are still basic and need to be enhanced.

Term entries created by translators are less thorough than those created by terminologists since they only include relevant information for current or future projects. Sometimes they only include the term equivalent, whereas at other times, they include a definition or context. They may also analyze term usage (with syntactic structures or collocations), or select the most appropriate variant, depending on the customer, type of text, register, etc. (Kageura & Marshman 2019). Evidently, this tendency responds also to tight deadlines. Therefore, the conceptual analysis carried out by translators is *ad-hoc*, i.e., it responds to the specific needs of the project, without recreating the whole underlying system.

Translation work is inevitably bound to technology. Termbases are very often used with computer-assisted translation tools, which integrate translation memories or machine translation (Reynolds 2015; Bowker 2015; Kageura & Marshman 2019). A translation memory is a collection of source texts and their translations, which are aligned at the sentence or paragraph level. Translation memories can be used to recycle translations, thus saving time. Alternatively, machine translation uses computer software to translate from one language to another (Reynolds 2015). Since these applications can integrate terminology management systems, they can show term information while translating. Additionally, they often enable pre-translation or automatic terminology replacement before translation, which guarantees term consistency (Kageura & Marshman 2019).

Finally, as part of the review process, translators focus on terminology quality assurance. For this purpose, they verify that terms have been translated in accordance with the termbase or the translation memory, depending on the most reliable resource (e.g., the terminology provided by the customer has normally priority) (Reynolds 2015). The system can also mark those instances where terms do not coincide with information in the termbase (Reynolds 2015).

Furthermore, to foster collaborative work, these personal termbases can be shared with other translators or merged with already existing termbases. For that purpose, TermBase eXchange format (TBX) was officially released as ISO 30042 in 2008 (Melby 2012), which deals with the variability of term record formats and enhance exchangeability of termbases (Kageura & Marshman 2019).

As can be observed, terminology management by terminologists and translators is of interest to companies, since many of these techniques can be applied to their internationalization strategy. Even though terminology management varies from company to company (Rirdance & Vailjevs 2006), the common goal is to ensure that the correct terms are used consistently, in support of product development, communication, translation or transcreation, and distribution. With a view to internationalization, it is essential that products and related material are available in different languages. Terms should also be explained, defined, updated, and made available to different groups in the company as well as outside it (Cerrella Bauer 2015). This way, every person involved in the production or management of a company's data can have access to its terminology (Wright 1997).

Different staff members can perform terminology management in a company. Specifically, this task responds to the collaboration between different departments (e.g., developers, product managers, and sales force) and technical communicators (writers, translators, and information specialists) (Wright 1997), as well as expert freelance terminologists who can also take part.

Corporate terminology management usually requires a project plan, which first entails an analysis of the situation followed by the strategic implementation of the plan. The steps are the following:

(i) identification of problems (e.g., inconsistent terms, translation errors, recurrent questions related to document inconsistencies and ambiguities, time-consuming review times, etc.).
(ii) establishment of goals (e.g., how terminology is to be gathered and stored, the languages used, approach selected, resources available, possible time or budget restrictions, etc.).
(iii) strategic implementation of the plan (i.e., actions to be carried out, budget available, timeline, etc.).
(iv) evaluation of the goals achieved (Cerrella Bauer 2015: 327-330).

Although evidently such plans require an economic investment, the returns can be expected in the short/middle term.

The notion of *term* in corporate terminology management is generally similar to the traditional view of terms. Nevertheless, it can also include product names, slogans, and proper names that are of interest to the company since they contribute to its corporate image, synonyms that are preferred over other variants used by the competition, etc. Warburton (2015) argues that, in enterprises, the traditional notion of *term* is complemented by other considerations, such as frequency and leveragability for business applications. For this reason, she defines the notion of *term* for companies as "any linguistic expression that needs to be managed in order to serve the various communication and technological needs, such as controlled authoring, computer-assisted translation, search engine optimization and content management" (Warburton 2015: 377). Some examples of terms for company purposes are non-nouns, general lexicon words and expressions, widespread variants, proper nouns, sentence fragments, or boilerplate text (such as copyright statements and legal notices) (Warburton 2015: 378). She adds terms that can pose translation problems. These should be collected since looking them up is time-consuming (Warburton 2015: 383).

In companies, terms are usually extracted from corpora of company documents, where automatic extraction techniques can also be applied. Terms are recorded in termbases, which are used by the staff, language service providers, public relations, and marketing service, etc. These termbases are also used during the quality assurance step to check the materials created by the company. According to Warburton (2015), a company's termbase should be interoperable, adapted to processes other than translation, extendable to new needs, representative of the company corpus, and designed in accordance with basic terminological principles (e.g., conceptual organization). As previously mentioned, these termbases should be checked and updated on a regular basis.

The level of granularity of the entries varies, depending on the enterprise and its terminology management objectives. Entries usually include a term in at least two languages, a definition (although its relevance for corporate terminology management is controversial, as evidenced in Cerrella Bauer [2015] and Warburton [2015]), usage notes, and references. Accordingly, the inclusion of synonyms enhances terminology management in a company. These are often used intentionally, e.g., to foster the brand image or save space (Kageura & Marshman 2019); but they can also be unmotivated, thus resulting in inconsistencies, which increase translation costs and hinder information retrieval (Warburton 2015). As observed by Dusterbeck & Hesser (2001), collecting synonyms improves catalogues and enhances information retrieval, among other benefits.

In corporate terminology management, conceptual analysis is also *ad-hoc*. In other words, it focuses on aspects that are of interest to the project. This can be observed in the lack of semantic relations in company's termbases, as pointed out by Warburton (2015). However, this analysis is of utmost importance, and should be adapted to the needs and goals of the enterprise. As highlighted by Warburton (2015) herself, in commercial settings, machines will eventually become users of terminology data. Therefore, systems such as machine translation tools, expert systems, natural-language interfaces to data bases, and spelling checkers need explicit conceptual information since they lack human world knowledge (Meyer 1993: 146). This is why conceptual analysis and representation are essential to terminology management systems.

Consequently, terminology is managed in different settings, in which it guarantees the quality of the services provided. In particular, terminology management is an internationalization strategy for companies, which provides them with opportunities in new markets and boosts their brand image.

MANAGING CORPORATE TERMINOLOGY: INSIGHTS FROM THE WIND POWER DOMAIN

This section describes the main steps to be followed in corporate terminology management. As a practical example, this process will be applied to a fictitious wind power company based in a Spanish-speaking country. As an internationalization strategy, the fictitious corporate owners decide to manage company terminology.

Wind energy is a growing sector of the economy as a result of climate change and environmental awareness. For this reason, wind-related companies are certainly prone to enter new markets. What is proposed here is a general framework for managing terminology in commercial settings. However, terminology management can evidently vary to satisfy the specific needs of an enterprise. Although a chronological, step-by-step procedure is presented, these techniques may not occur sequentially in the actual workflow. The steps described include methods for: (i) corpus preparation and compilation; (ii) term extraction; (iii) conceptual analysis; (iv) identification of equivalents; and (v) representation and storage in terminology management systems.

Corpus Preparation and Compilation

Corpora are usually employed in linguistic analysis, thanks to their endless possibilities. A corpus is a collection of texts that are selected according to specific criteria and constitutes a language sample (Sinclair 1996: 4). Companies may want to use their documents and materials to create a corpus for terminology management. For that purpose, three basic steps must be followed: (i) text selection; (ii) text cleaning and preparation; and (iii) corpus compilation and storage.

The terminology managed by an enterprise depends to a large extent on the texts selected for the corpus. Documents such as reports, fact sheets, advertising material, etc. can be collected to create a corpus. A company may also form several corpora based on document types or sections in the organization.

The text format must also be considered. Although corpus analysis tools normally accept different text formats (e.g., .doc, .html, .tmx, .txt, .xml, .pdf, .xls, .xliff, .zip, etc.), plain text is favored since it avoids tags or elements that can cut sentences and hinder terminology management. If text types different from plain text need to be included in the corpus, it is advisable to convert them to plain text and clean them prior to compilation in order to avoid processing errors and to maximize the possibilities of the corpus analysis tool. Therefore, different cleaning actions should be carried out, such as joining words that are split at the end of lines, or the deletion or removal of the tables and figures that interrupt the text. In languages such as Spanish, written accents must often be normalized since they are not always recognized when converting documents to plain text.

Once prepared, texts must be stored in a corpus analysis tool to make the most of them. In this study, Sketch Engine (https://www.sketchengine.eu/, Kilgarriff et al. 2014) was used, which is an online corpus tool that makes available a large number of public corpora, such as the British National Corpus or the English Web corpus (enTenTen) for English. Alternatively, users can also upload their own corpora (as would surely be the case with enterprises), make their corpora bigger, or create a new one by means of the automatic text extraction from the web. Especially, this tool stands out because of its different, extremely useful options for corpus analysis (e.g., frequent combinations, synonyms, parallel corpus with translations, etc.).

When creating a new corpus (e.g., a company's documents), it needs to be compiled in order to be usefully searched and analyzed. This compilation includes part-of-speech (POS) tagging and the application of a sketch grammar to capture and represent word combinations. Different options can be chosen when compiling a corpus. Some of the most frequent are using TreeTagger 2.5 for the POS tagging of English corpora and FreeLing 2.0 for Spanish corpora. As for sketch grammars, English 3.3 for TreeTagger pipeline v2 is commonly used in English, whereas Spanish (Freeling tagset) 2.0 is often applied to Spanish corpora.

To illustrate this, a comparable corpus on wind power in Spanish and English was compiled. It was composed of specialized texts on this domain originally written in Spanish (3,022,698 words) and English (3,025,237 words). The specialized texts were research articles, books, PhD dissertations, reports, etc. They were queried manually by searching scientific databases such as the Web of Science and Scopus, as well as search engines (i.e., Google).

Text authority (i.e., author reputation and expertise) was one of the criteria for text selection. Therefore, the articles selected were published in national and international journals and conferences, such as *Wind Energy* and *Ingeniería Energética*. Likewise, PhD dissertations carried out in universities located in Spanish- or English-speaking countries (e.g., Universidad Politécnica de Madrid, Stanford University) were chosen. Furthermore, the reports selected were issued by organizations of recognized authority, such as the National Renewable Energy Laboratory of the U.S. and the Spanish Wind Energy Association. Appropriate authorship was assumed for books and legislative texts, as they came from recognized publishers and institutional bodies.

The selection of texts for the corpus of this research was also based on their content. Texts dealing with wind energy were selected. To this end, they should include key terms such as *wind power*, *wind energy*, *wind turbine*, or *wind farm* in English and Spanish respectively. Besides, the texts were well-balanced and representative of wind energy in both languages, which was achieved by means of an iterative selection process. First, this involved the search for texts in Spanish, whose keywords were obtained in Sketch Engine and used in English to obtain texts in this language. Then, additional Spanish texts were included. This iterative process was followed until a similar number of words in both corpora was achieved.

Along these lines, the texts selected were objective and highly specialized, as can be derived from the different types of texts included, most of which were the result of scientific research. The inclusion of different text typologies does not affect the level of specialization required since they illustrate the different types of communication between specialists and could thus correspond to the texts generated in a company of this domain.

Finally, texts were selected based on the design of the resources. Therefore, their accessibility (e.g., availability of the full text) and their ease of processing (e.g., texts available for download) were considered, with a view to facilitating the subsequent tasks of cleaning and preparation. After that, texts were compiled in Sketch Engine.

In conclusion, even though these texts were not proper to a specific, real company, they included technical vocabulary and thus simulated the texts produced by a fictitious wind-related company. This first approach can be later applied to a particular company. The corpus was used for tasks such as term extraction, conceptual analysis, or identification of equivalents.

Term Extraction

Identifying terms of interest is evidently the first step in terminology management. As previously mentioned, terms for corporate purposes include specialized knowledge units that are traditionally conceived as such, as well as proper nouns that contribute to the company's brand image, preferred synonyms, terms that can be problematic in translation, or any linguistic expression that needs to be managed to meet the different communication and technological needs. This includes any word or expression that is important for the company, regardless of its general or specialized meaning.

Enterprises often have a list of terms to be managed and stored in a termbase. However, corpus analysis tools also permit the automatic extraction of keywords. For instance, Figure 1 shows the single- and multi-word terms identified by means of the Keywords function of Sketch Engine, which identified terms such as *aerogenerador* [wind turbine], *crowbar* [crowbar], or *horizonte de predicción* [prediction horizon] in the Spanish wind power corpus. This automatic term extraction requires human validation, especially in the case of multiword terms. These are very frequent in specialized discourse but they are not always correctly identified by automatic methods, which often include more or fewer elements than those present in the actual multiword term (Cabezas-García 2020).

Figure 1. Sample of the single-word terms (left) and multiword terms (right) extracted by means of the Keywords function of Sketch Engine. Source: Sketch Engine

	Word
1	aerogenerador
2	eólico
3	rotor
4	turbina
5	convertidor
6	electrolizador
7	predicción
8	estator
9	devanado
10	crowbar

	Word
1	parque eólico
2	velocidad del viento
3	energía eólica
4	velocidad de viento
5	potencia eólica
6	recurso eólico
7	hueco de tensión
8	potencia activa
9	potencial eólico
10	horizonte de predicción

More specific queries can also be carried out using Corpus Query Language (CQL) in the Concordance section of Sketch Engine. CQL is a special code that allows users to search for complex grammatical or lexical patterns in the form of regular expressions. For example, the expression [tag=”N.*”] identifies all the nouns in a corpus, whereas the Keywords option shows a limited number of results. Despite the prominent role of nouns in automatic term extraction, parts of speech other than nouns can also be of interest. For example, the query [tag=”V.*”] targets verbs and energy-related predicates such as *producir* [produce], *generar* [generate], *instalar* [install], *regular* [regulate], or *transformar* [transform] in the Spanish wind power corpus. More complex structures, such as multiword terms, can also be targeted. For this purpose, regular expressions that represent the common structures of multiword terms can be formulated (Table 1).

Table 1. CQL query to extract nouns postmodified by adjectives in Spanish

[tag=”N.*”][tag=”A.*”]+

Source: the author

The regular expression in Table 1 targets any sequences including a noun ([tag=”N.*”]) followed by one or more adjectives ([tag=”A.*”]+). It extracted multiword terms such as *desarrollo eólico* [wind development] or *potencial eólico medio* [average wind potential]. Alternatively, Spanish multiword terms can also include prepositional modification (Table 2).

Table 2. CQL query to extract nouns postmodified by prepositional phrases in Spanish

[tag=”N.*”][tag=”S.*”][tag=”D.*”]?[tag=”N.*”]

Source: the author

The regular expression in Table 2 elicits a noun ([tag=”N.*”]) followed by a preposition ([tag=”S.*”]), an optional determiner ([tag=”D.*”]?), and another noun ([tag=”N.*”]). Multiword terms such as *red de transporte* [transport network] or *rendimiento de Carnot* [Carnot efficiency] were extracted. Combined modification is also possible (i.e., adjectival and prepositional modification), as presented in Table 3.

Table 3. CQL query to extract nouns postmodified by adjectives and prepositional phrases in Spanish

[tag=”N.*”][tag=”A.*”]?[tag=”S.*”][tag=”D.*”]?[tag=”N.*”]+[tag=”A.*”]?

Source: the author

This CQL query targets a noun ([tag=”N.*”]) followed by an optional adjective ([tag=”A.*”]?), a preposition ([tag=”S.*”]), and an optional determiner ([tag=”D.*”]?), which can introduce one or more nouns ([tag=”N.*”]+) and an optional adjective ([tag=”A.*”]?). As a result, different structures such as

Table 4. CQL query to extract proper nouns

[word=”[A-Z][a-z]+”]+

Source: the author

implantación de parque eólico [wind farm installation] or *rendimiento eólico del emplazamiento* [wind site performance] were obtained. Along these lines, longer or more specific sequences can be formulated, including different types of constituents. For instance, proper nouns may be targeted (Table 4) since they are commonly of interest to companies.

The regular expression in Table 4 elicits one or more (+) words of at least one character, which include a capital letter ([A-Z]) that is followed by small letters ([a-z]). Different proper nouns that can serve the purposes of corporate terminology management were identified, such as wind-related companies (e.g., Abengoa, Vestas, Acciona Energy, or Gamesa) and legal documents (e.g., Acta Única Europea [Single European Act], a European text promoting, among other things, a single electricity market). Evidently, many words starting with a capital letter without being proper nouns (e.g., words starting a new sentence after a period) were also obtained. In these cases, as well as in corpora analysis in general, a critical approach should be adopted.

Managing acronyms is also in line with corporate terminology management since these are common in specialized language and are often the source of comprehension or translation problems (e.g., when an acronym refers to different concepts). Table 5 shows a regular expression that extracts words in capital letters and is thus useful for acronym identification. Acronyms such as *AEE* (Asociación Empresarial Eólica [Spanish Wind Energy Association]) or *LCOE* (Leveraged Cost Of Energy, one of the many English terms used in Spanish) were obtained.

Table 5. CQL query to extract words in capital letters

[word="[[:upper:]]*"]

Source: the author

Names or reference codes of products can also be of interest. Table 6 describes a regular expression that extracts units composed of one or more capital letters ([A-Z]+) followed by one or more numbers ([0-9]+). This is one of the forms after which reference codes are usually named. It extracted codes such as *G47*, *G52*, *G58*, and *G90* (Figure 2).

Table 6. CQL query to extract sequences of capital letters and numbers

[word="[A-Z]+[0-9]+"]+

Source: the author

In conclusion, this section has presented different corpus techniques for term extraction. As can be observed, such specific results are not always easily obtained by means of automatic term extraction

Figure 2. Sample of the codes obtained by means of the CQL query [word=”[A-Z]+[0-9]+”]+. Source: Sketch Engine

doc#93	stá constituido por 4 aerogeneradores de la marca Gamesa [5] modelo	G47	de 660 kW de potencia unitaria. </s><s> La figura 8.6 muestra la curva
doc#66	lispersada en varios ciclos de rotación de las aspas. Para los modelos	G52	y G58 de Gamesa, esta velocidad de giro oscila entre 14,6 y 30,8 rpm, l
doc#93	> Está constituido por 9 aerogeneradores de la marca Gamesa modelo	G52	de 850 kW de potencia unitaria. </s><s> La figura 8.8 muestra la curva
doc#60	lida que disminuyen los vatios por metro cuadrado. </s><s> Las G52 y	G58	son dos turbinas de 850 kilovatios de potencia nominal y también aum
doc#60	otencia en el entorno de 315 vatios por metro cuadrado en la máquina	G90	. </s><s> Estas bajas densidades, aunque tienen un coste superior, y lu

methods. However, these terms are relevant for corporate terminology management and facilitate management tasks, such as the identification of conceptual information.

Conceptual Analysis

Terminology cannot be managed without analyzing the underlying conceptual system. This analysis can be more or less thorough depending on the company’s goals. Some studies reject the presence of semantic aspects such as relations in corporate termbases (Warburton 2015). Nevertheless, this conceptual information is of paramount importance since it facilitates concept understanding and communication. For this reason, conceptual information should be present in corporate termbases. Conceptual analysis has two major applications: (i) recreation of the underlying conceptual system, which among other aspects, provides the human knowledge that machine processes lack; and (ii) extraction of data to be included in the termbase, with a view to properly storing and managing corporate terminology, and using its termbase in different corporate processes.

First, conceptual information must be extracted and organized. Even though the staff may provide the knowledge of the domain and the tasks carried out, this expert knowledge should be complemented with corpus information. Therefore, information is analyzed, based on specific knowledge of the company instead of the different views or linguistic preferences that can be found in external terminological resources. The extraction of conceptual information usually targets semantic relations, definitions, and synonyms, among other things. In what follows, different corpus techniques are proposed to elicit these conceptual data.

The wind energy domain encodes general and specific semantic relations (e.g., *type_of*, *part_of*, *affects*, *uses_resource*, *located*). Their specification enhances the semantic description of the domain and facilitates other tasks, such as comprehension, communication, and translation. Even though the relations between many concepts are obvious and are known to the company’s staff (e.g., *Darrieus wind turbine* is a type of *wind turbine*), there are other less evident relations, which require a more detailed analysis. There are various corpus techniques that can be used for this purpose, such as knowledge patterns and context filtering.

The most straightforward way to find semantic relations is to search for discursive structures revealing them (Condamines 2002), which are known as knowledge patterns. In Spanish, some of these structures are the following, which are presented together with the relation to which they refer:

- *type_of/has_type* (since many relations are bidirectional): Y es un X; Y es un tipo de X; X entre los que se encuentra Y; X, tales como Y.

- *part_of/has_part*: X se compone de Y; X está formado por Y; X está compuesto por Y; Y es una de las partes de X; Y es uno de los componentes de X.
- *causes/caused_by*: X causa Y; X provoca Y; X produce Y; X origina Y; Y está causado por X; Y está provocado por X; Y está producido por X; Y está originado por X.
- *affects/affected_by*: X afecta a Y; X tiene efectos (adjective) sobre Y; X influye en Y; X perjudica Y; Y se ve afectado por X; Y resulta perjudicado por X; Y recibe los efectos de Y.
- *uses_resource/resource_used_by*: Y utiliza X; X inyectado a Y; X alimenta Y.
- *located/location_of*: X se encuentra en Y; X está ubicado en Y; X se localiza en Y.

Therefore, by using domain concepts, relations between them as well as with other concepts can be searched for. This can be done by means of simple queries in the corpus. For example, sequences such as "el tren de potencia está formado por" can be queried, paying attention to what appears after the knowledge pattern (i.e., *el tren de potencia está formado por una caja multiplicadora de velocidades*). That is to say, a drivetrain is composed of a gearbox. Alternatively, this and other knowledge patterns can be queried by means of CQL searches, which are more flexible and can be used to obtain more results. Table 7 shows a CQL query integrating different knowledge patterns that convey the *has_part/part_of* relation in Spanish. Specifically, this regular expression searches for *tren de potencia* ([lemma="tren"][word="de"][lemma="potencia"]), which is followed by a possible span of 0 to 5 elements ([]{0,5}), the verb *estar* ([lemma="estar"]), the verbs *formar* or *componer* ([lemma="formar|componer"]), a possible span of 0 to 5 elements ([]{0,5}), and the prepositions *por* or *de* ([lemma="por|de"]).

Table 7. CQL query to extract the parts of a drivetrain (tren de potencia) in Spanish

[lemma="tren"][word="de"][lemma="potencia"][]{0,5}[lemma="estar"][lemma="formar|componer"][]{0,5}[lemma="por|de"]

Source: the author

Other parts of the drivetrain were elicited by means of additional knowledge patterns (i.e., *está compuesto por*), as observed in the following concordance line:

El sistema mecánico de un aerogenerador, también conocido como sistema de transmisión, tren de potencia o drivetrain system, está compuesto por el conjunto de masas rotativas y los ejes que conectan dichas masas. Adicionalmente se suelen encontrar cajas multiplicadoras.

In particular, drivetrain systems are composed not only of a gearbox, but also of several rotating mass and the shafts connecting them. As can be observed, knowledge-rich contexts are obtained, which are defined as those containing at least one term explicitly related to another. Furthermore, these explanatory contexts can be used as usage examples in termbases.

However, relations can also be codified in different ways that may not be described by knowledge patterns. To find them, a contextual search as proposed in Cabezas-García and León-Araúz (in press) can be carried out. This is done using the Filter context option in Sketch Engine and consists in inserting the two concepts between which the relation is unknown, but this time without giving any indication of how this relation could be conveyed. Context filter reveals the elements joining these concepts, thus highlighting the relation between them. Normally, this search shows new knowledge patterns and structures (e.g., *propulsado por* in Figure 3), which can be integrated in future terminological analyses of the company. However, despite its usefulness, it is advisable to perform this type of query when no knowledge pattern is found since it is more time consuming and it generates more noise. Figure 3 shows a sample of the results provided by the Filter Context option when searching for contexts in which the terms *turbina* or *aerogenerador* [wind turbine] co-occur with the term *agua* [water].

Figure 3. Sample of the Filter Context results when searching for contexts in which turbina or aerogenerador co-occur with agua. Source: Sketch Engine

This is an interesting example since contexts reveal that the relation between *aerogenerador/turbina* and *agua* is twofold. On the one hand, a wind turbine can be placed offshore, i.e., aerogenerador *ubicado_en* (*located_at*) agua (lines 2, 4, 5, and 7). On the other hand, water can be used to drive the turbine, i.e., turbina *utiliza_recurso* (*uses_resource*) agua (lines 1, 3, and 6). In this case, instead of a wind turbine, the concept is a water turbine and the equivalent *aerogenerador* is not used since it is not valid.

Once the semantic relations between concepts have been elicited, these will serve to recreate the underlying conceptual system, which is useful for ontology development and integration into the termbase.

In line with semantic relations, conceptual analysis in companies may also include definition extraction. Although not everyone agrees on their importance in corporate terminology management (Warburton 2015), they are fundamental to many of the objectives pursued by companies when managing their terminology. For example, they make it possible to understand concepts and decide on the most appropriate translation, and they also provide added value to the termbase (differentiating it from a simple list of terms or translations). However, depending on the company's goals, not all concepts need to be defined since, evidently, definition crafting costs time and money (Cerrella Bauer 2015). It is necessary to focus on those concepts that contribute most to the company's objectives. These are usually units that do not appear in other dictionaries (e.g., proper names, product names, or models), acronyms, specialized terms, terms for which a certain variant is preferred, or terms that often pose comprehension difficulties or translation problems.

In most of these cases, it will be necessary to draft a definition. Although conceptual information can be found in external resources (e.g., terminology resources, Internet), company information should be given priority. For this purpose, the corpus techniques for extracting semantic relations presented above may be useful.

However, before going into detail, the recommended structure of definitions must be considered, as this is a way to better focus corpus queries. Definitions usually consist of a genus or conceptual category to which the concept belongs, and differentiae, that is, the conceptual features that distinguish it from the rest of the elements in the class (Faber et al. 2001). Therefore, in order to make a concept clear, it is first advisable to ascertain its membership in a certain conceptual category. This can be achieved, for instance, by means of the knowledge patterns conveying the *type_of/has_type* relation. Then, the definition is composed of the main attributes and semantic relations that the concept encodes with other concepts. For example, *torre tubular* [*tubular tower*] is a type of tower frequently used in large wind turbines, which is made of rolled steel plates. Therefore, its definition could be crafted as follows: "Torre construida a base de placas de acero que se suele utilizar en aerogeneradores de gran potencia".

Another interesting option to extract corpus definitions is the use of metalinguistic knowledge patterns, such as *término, palabra, llamado, define, definido como, se refiere a, referido a*, or *significa*. By forcing the appearance of the concept with these metalinguistic knowledge patterns, information regarding its definition will surface. Table 8 shows a CQL query, which searches for *LCOE* ([lemma="lcoe"]), followed by a span of 0 to 5 elements ([]{0,5}), and metalinguistic knowledge patterns in Spanish ([word="término|palabra|llamado|define|definido|refiere|referido|significa"]).

Table 8. CQL query to extract LCOE followed by metalinguistic knowledge patterns in Spanish

[lemma="lcoe"][]{0,5}[word="término|palabra|llamado|define|definido|refiere|referido|significa"]

Source: the author

This query permitted the extraction of the following definitions of *LCOE*:

El LCOE, **definido como** *coste unitario de producción (€/kWh) es el resultado de un árbol de magnitudes financieras, de costes y operativas de una instalación eólica, interrelacionados entre sí, a lo largo de la vida útil del proyecto.*

LCOE **puede ser definido como** *la suma de los costes de una planta de generación (incluyendo los costes de fabricación de la propia planta, de operación, mantenimiento, etc. sobre todo su periodo de vida) dividido por la producción de energía durante toda su vida útil.*

Therefore, the company could either use one of these definitions or create a new definition based on this information: "El LCOE es el coste unitario de producción, medido en €/kWh y producido a partir de la suma de los costes de una planta de generación dividido por la producción de energía durante toda su vida útil". However, since definitions are not always explicitly expressed through these knowledge patterns, they can be considered an additional search complement.

Conceptual analysis is also essential to identify synonyms (i.e., different ways of naming the same concept), which are very important in corporate terminology management. They allow for effective communication and expression according to the company's preferred terms. For this purpose, the company may have a previous list of preferred or not recommended terms and variants. If this is not the case, these variants can be extracted from the corpus. Knowledge patterns are again of interest since they can be used to direct the search for synonyms. Some of these forms in Spanish are *también conocido como, también llamado*, and *es sinónimo de*. These knowledge patterns can be integrated into CQL queries such as the following (Table 9):

Table 9. CQL query to extract synonymic knowledge patterns in Spanish

[tag="RB.*"]{0,}[word="conocido|llamado"][tag="RB.*"]{0,}[word="como"]{0,}[tag="N.*|A.*|RB.*|VVG.*|VVN.*"]{0,} [tag="N.*"]

Source: the author

Table 9 shows a CQL query that includes a possible adverb ([tag="RB.*"]{0,}), the words *conocido* or *llamado* ([word="conocido|llamado"]), which may be followed by another adverb ([tag="RB.*"]{0,}), and the word *como* ([word="como"]{0,}). Finally, the query searches for a possible noun, adjective, adverb, and present or past participle ([tag="N.*|A.*|RB.*|VVG.*|VVN.*"]{0,}), and a noun ([tag="N.*"]). For instance, this query was used to extract the following sequence, which includes three synonyms:

*Núcleo (***también conocido como** *culata o yugo): parte metálica, de material ferromagnético que, dependiendo del tipo de contactor, es común que adopte la forma la letra E, y se encuentra fijado a la carcasa.*

The synonyms *núcleo, culata*, and *yugo* [yoke] were elicited thanks to these knowledge patterns. In all probability, the company will decide to prefer or discard some of them, so terminology should be managed based on its preferences. As a result, managing synonyms helps to meet the company's goals.

These conceptual analysis techniques can be useful for corporate terminology management. These methods are essential before starting translation, a fundamental step for internationalization.

Identification of Equivalents

Multilingual information management is essential with a view to internationalization. It must be based on the various terminological tasks discussed so far, which ensure that translation is carried out successfully.

On the one hand, the company may already have its materials translated. They may be compiled in the form of a parallel corpus (i.e., a collection of texts in one language aligned with their translation in another language). In that case, the identification of equivalents is usually simple and fast. Therefore, the use of equivalents already employed in corporate documents is guaranteed.

On the other hand, the company may have translated documents that are not compiled in the form of a parallel corpus. Ideally, these should be compiled as a parallel corpus in a corpus analysis tool so that translations can be quickly and efficiently reused. Sketch Engine offers several possibilities for this, which vary in complexity. The simplest way is to build a parallel corpus from tabular data. A document in Excel, TMX, XML, XLIFF, or other similar formats is required. Each column in this file will be understood as a language (e.g., if the documents has two filled columns, the system understands that there are two languages). Accordingly, every cell in the columns will be understood as a segment (first column) and its translation (second column). Once the corpus has been compiled, queries can be made as indicated above.

Nevertheless, the company may not have its materials translated. In that case, with a view to producing idiomatic translations that can be reused in the future, the company can create a comparable corpus from similar external domain-specific texts, which have a similar register, and which are written in the target language. In this corpus, idiomatic translations can be identified since it is assumed that the corpus texts were originally written in the foreign language. However, searches are more complex and time-consuming than in parallel corpora. To illustrate the queries that can be performed to find translations in a comparable corpus, an English corpus composed of specialized wind energy texts (described in the Corpus Preparation and Compilation section and similar to the materials of a wind-related company) will be used.

Cabezas-García and León-Araúz (in press) describe corpus techniques for the translation of multiword terms. In this section these techniques are applied to different kinds of units or expressions that may require translation.

First, the quickest query evidently involves searching the corpus for the direct equivalent that is known or present in terminological resources. For example, the most common English translation of *aerogenerador* is *wind turbine*, which is very frequent in the comparable corpus.

However, the identification of equivalents is not always that simple. Another technique that can be used, especially in the case of a translation of a multiword term, entails searching for the translation of some of the constituents. For example, in the term *generador de inducción de rotor bobinado*, the translation of some of its elements may be known, such as *generador* [generator], *inducción* [induction], and *rotor* [rotor]. However, if the translation of *bobinado* is unknown, it can be obtained with the following query (Table 10):

Table 10. CQL query including the translations of some constituents of a multiword term

[tag=”N.*|JJ.*|RB.*|VVG.*|VVN.*”][lemma=”rotor”][]{0,4}[lemma=”induction”][]{0,4}[lemma=”generator”]

Source: the author

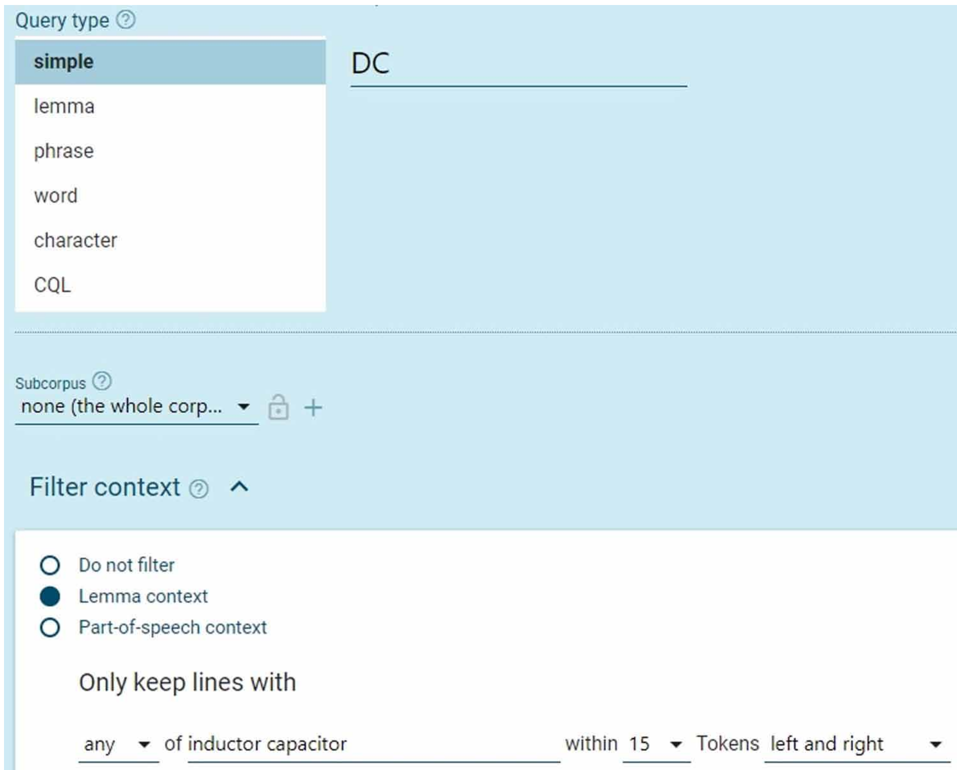
This CQL query searches for the possible structure of a multiword term in English. In particular, the direct equivalents *rotor induction generator* ([lemma=”rotor”][]{0,4}[lemma=”induction”][]{0,4}[lemma=”generator”]) are looked for, with a possible span of 0 to 4 elements between them to allow for other possible elements. These are preceded by a modifier that is usually a noun, an adjective, an adverb, or a past or present participle ([tag=”N.*|JJ.*|RB.*|VVG.*|VVN.*”]), which hopefully will reveal the translation of *bobinado*. By means of this query, the widely used term *wound rotor induction generator* was identified, which alludes to the same concept that *generador de inducción de rotor bobinado*.

Table 11. CQL query conveying a conceptual search

[lemma=”wind”][lemma=”turbine”][]{0,4}[lemma=”form|compose”][]{0,4}[lemma=”of|by”][]{0,8}[tag=”N.*”]

Source: the author

Figure 4. Contextual query in Sketch Engine by means of the Filter Context option. Source: Sketch Engine



However, if these queries are not applicable to the translation, a conceptual search can be carried out since equivalences in terminology are usually based on meaning coincidence. This conceptual query involves searching for one of the concepts whose translation is known, together with the English knowledge patterns that convey the relation with the concept whose translation is unknown. For example, when translating *convertidor AC/DC/AC*, one may know that this is one of the components of a wind turbine. Therefore, the following query can be formulated (Table 11):

This CQL query searches for wind turbine ([lemma="wind"][lemma="turbine"]), followed by a possible range of 0 to 4 elements ([]{0,4}), and some knowledge patterns that convey the *has_part* relation in English ([lemma="form|compose"][]{0, 4}[lemma="of|by"]). Finally, a wider range from 0 to 8 elements and a noun are included, so as not to rule out long expressions ([]{0,8}[tag="N. *"]). This query allowed us to obtain, among others, the following concordance line, which includes the equivalent *back-to-back converter*, whose meaning coincides with *convertidor AC/DC/AC*.

Figure 5. Sample of the results obtained by means of the Filter Context option. Source: Sketch Engine

The proposed control techniques were verified by an experimental DFIG **wind turbine system composed of** a DFIG, **a back-to-back converter**, an active crowbar, and a DC chopper.

In other cases, the relation between the term to be translated and other concepts is not known. A contextual query can then be used by means of the Sketch Engine's Filter Context option. This is a broader search, which therefore provides more noise, and consists of searching if several terms co-occur in the same context without the need to express how they are related. Figure 4 shows this query in Sketch Engine. Specifically, the focus is on contexts in which the terms, *DC* and *inductor* or *capacitor,* co-occur, with a view to finding the translation of *bus de corriente continua*. These contextual terms were selected because DC is dealt with in this system, in which inductors and capacitors take part. The option *Any* is selected in Sketch Engine in order not to force the appearance of both *inductor* and *capacitor* (i.e., either one or the other term can appear in the context of *DC*). These terms were searched for in a span of 15 elements on the left and the right of the main term (*DC*).

Figure 5 below presents some of the results of this query, where it can be observed that the terms *DC link* and *DC bus* are related to the contextual elements queried. After verifying the meaning coincidence of the terms in both languages, the correspondence between *bus de corriente continua, DC bus* and *DC link* was confirmed. Since various synonyms coexist, the company should decide whether they can be interchangeable in their documents or whether one of these variants is preferred.

In summary, this section has described different techniques for the identification of term equivalents in comparable corpora. Evidently, the search for equivalents will not always be direct or infallible using these simple techniques. Nevertheless, they are expected to serve as a starting point for generating more complex queries, adapted to every translation situation.

Representation and Storage in Terminology Management Systems

The previous sections have described different techniques to obtain the various terminological data that should be integrated into termbases with a view to efficiently managing and reusing company content. However, representation and storage in a termbase has to be consistent and organized to avoid problems related to the display and export of information, data misunderstanding, etc.

To this end, the general structure of termbases must be considered. Termbases are concept-oriented, that is, unlike traditional dictionaries, each entry in a termbase corresponds to a concept. Therefore, information that applies to the same concept must appear in the same entry (e.g., definition, synonyms, administrative data, etc.). On the contrary, in traditional dictionaries, which are term-oriented, every entry corresponds to a term. Thus, for example, the entry of a polysemous term (i.e., a term having several meanings) in a dictionary includes its different meanings, whereas, in a termbase, there is one entry for every meaning or concept.

Accordingly, information in termbases must be organized in levels and, within each level, in data categories. There are three hierarchical levels in a termbase, which are related to concept, language, and term respectively. Within each level, data categories are used, which are compartments where the different data are organized. When defining the structure of a termbase, the characteristics of every data category must be established. This entails deciding whether the information is mandatory or optional, the type of data that will be entered (i.e., free text, picklist, etc.), and the input method that will be used (i.e., manual, system-generated, etc.) (ISO 1087-2:2000). The correspondence of each data category to a specific level must also be considered a priori.

Table 12. Concept entry for doubly fed induction generator

CONCEPT LEVEL **Entry ID:** 0064. **Domain:** wind turbine components. **Created by:** I.G.F. **Date:** 04/10/2020.
LANGUAGE LEVEL **Definition:** generador de inducción de rotor bobinado alimentado por el lado del rotor y del estátor. El estátor está conectado directamente a la red, mientras que el rotor está conectado a la red mediante un convertidor AC/DC/AC de frecuencia variable que mejora el funcionamiento de la turbina. **Reference:** corpus de la empresa. **Concept usage note:** se debe revisar su comportamiento ante huecos de tensión.
TERM LEVEL **Term:** generador de inducción doblemente alimentado. **Part of speech:** sintagma nominal. **Genre:** masculino. **Number:** singular. **Context:** Para controlar la potencia activa y reactiva de un generador de inducción doblemente alimentado, conectado a la red eléctrica, se recomienda el control por orientación del flujo estator. **Term usage note:** preferido.
TERM LEVEL **Term:** generador de inducción de doble alimentación. **Part of speech:** sintagma nominal. **Genre:** masculino. **Number:** singular. **Context:** Aunque el método planteado es válido para generadores de inducción de doble alimentación y generadores síncronos conectados en serie con un convertidor de frecuencia, no se indica cómo se agrega el sistema eléctrico. **Term usage note:**
TERM LEVEL **Term:** DFIG. **Part of speech:** sigla. **Genre:** masculino. **Number:** singular. **Context:** Es tal vez el DFIG el más comercial en la actualidad, ya que presenta características especiales en su funcionamiento que lo hacen muy adecuado y con mayor eficiencia global que el tipo GIGA, para los lugares con velocidad de viento variables. **Term usage note:** sigla inglesa válida.
LANGUAGE LEVEL **Definition:** wound rotor induction generator that is fed from its both stator and rotor sides. The stator is directly connected to the grid while its rotor is connected to the grid through a variable frequency AC/ DC/ AC converter, which optimizes the operation of the turbine. **Reference:** company corpus. **Concept usage note:** check its behavior in case of voltage dip.
TERM LEVEL **Term:** doubly fed induction generator. **Part of speech:** noun phrase. **Genre:** **Number:** singular. **Context:** The reactive power generation of a doubly fed induction generator (Type C wind turbine) can be controlled by the rotor current. **Term usage note:**
TERM LEVEL **Term:** DFIG. **Part of speech:** abbreviation. **Genre:** **Number:** singular. **Context:** In the configuration of the DFIG, the stator of the DFIG is directly connected to the grid, and the rotor circuit is linked to the network by partial-scale back-to-back voltage source converters. **Term usage note:** preferred.

Source: the author

The most general level is usually known as the concept level or entry level, and includes information related to the concept, which applies to all languages. Thus, for example, this level includes data categories such as the domain, multimodal information (e.g., image), or administrative information (e.g., author of the entry, date of creation, entry identifier). When termbases allow the inclusion of semantic relations, these should also be conveyed at the concept level.

Then, the language level includes data categories with information related to the concept that varies in each language, such as the definition, which can be written in the different working languages. Other data categories may also be included, such as the source or reference of the definition, or concept usage notes in every language.

The most specific level is the term level, which includes data categories with information, such as the term itself (or terms, if there are synonyms, another term level being created for this purpose), part of speech, gender, context, or term usage notes (where, for example, the preference for a certain synonym can be highlighted).

Table 12 below shows the concept entry for DOUBLY-FED INDUCTION GENERATOR, which can serve as an example and includes different data categories that may be of interest for a company, organized in the levels mentioned above. Two languages are included: Spanish and English. Furthermore, different terms referring to the same concept (i.e., synonyms) are described in each language, and the preferential use of some of them for the company is considered, as well as additional aspects regarding the use of each term.

After terminological analysis, the information in Table 12 can be introduced in the company's termbase. In this sense, the use of data exchange standards is encouraged, so that the termbase can be shared between different members of the company, as well as with translators or terminologists. For this purpose, it is recommended to use Term Base eXchange (TBX), which is the open standard for exchanging structured termbases. Thus, for example, the termbase could be used effectively by a translator, who can also implement it in a computer-assisted translation tool with a view to facilitating and enhancing translations. The termbase is therefore the final product resulting from the various tasks of terminology management.

CONCLUSION

This chapter focused on terminology management, which can be carried out to achieve corporate internationalization goals. Even though the internationalization of a company encompasses more processes than just terminology management, this is an important part that guarantees effective communication, brand image, and adequate translation, among other aspects. Therefore, it is the starting point for many other relevant tasks. Terminology management can have different forms, depending on the setting in which it is performed and the desired objectives.

This study has presented a proposal for terminology management, mainly based on corpus techniques. In spite of being a widely known resource, corpora offer many possibilities yet to be explored, as can be seen in the procedure proposed in this research. This is designed to facilitate the management of different terminological aspects that must be addressed when handling the terminology of an enterprise. The techniques proposed are not intended to be mandatory guidelines, but to open new doors and ideas in terminology management in general and in corporate management in particular. Of course, this requires a critical attitude from linguists in charge of terminology management. This critical attitude, as well as an autonomous character, are fundamental in deciding on aspects such as the selection of terms to be managed, the evaluation of conceptual phenomena that often occur in specialized language, and the analysis and discrimination of term variants in the different languages involved.

For the purposes of the study, monolingual terminology management was first addressed with special attention to relevant aspects such as corpus preparation and compilation, term extraction, and conceptual analysis. This solid conceptual grounding in the source language facilitates the translation of the company's materials, which is essential if it aims at entering international markets. In particular, aspects of interest such as the identification of interlinguistic equivalents and term representation and storage in terminology management systems were described. This proposal allows companies to look to international markets for potential customers, especially in today's world, when they must show a greater capacity for adaptation in order to successfully meet the new challenges of globalization.

Plans for future research include the application of the procedure to the terminology management of a real company, which would allow us to prove its usefulness and enhance it. Along these lines, analyzing the particularities of a real company and knowing their specific goals when managing terminology would be of aid to further define the procedure. Finally, additional research on named entity recognition could improve the identification of proper nouns in this method, which can be particularly interesting in corporate communication.

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KEY TERMS AND DEFINITIONS

Corpus: Collection of texts that are selected according to specific criteria and constitutes a language sample.

Corpus Analysis Tool: Software that allows users to explore how language works by analyzing authentic texts.

Knowledge Pattern: Expression or discursive structure that reveals one or several semantic relations.

Regular Expression: Sequence of characters that define a search pattern in order to match a desired, specific result.

Semantic Relation: Meaningful link between concepts.

Termbase: Database containing terminology and related information.

Terminology Management: Process of identifying, storing, and managing terminology specific to a project, a company, a product, etc.

Chapter 4
Relationship Marketing and Communication as a Driver of Fundraising Loyalty and Success in Non-Profit Organizations:
A Theoretical Perspective

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ABSTRACT

Competitiveness is becoming a growing phenomenon. The quality and innovation in the art of doing business is becoming increasingly evident, showing to the need for organizations to create mechanisms capable of adding value to consumers and occupying a better positioning in their minds. Therefore, fundraising policy planning becomes a priority for non-profit organizations (NGO). This chapter aims to prove the contribution of fundraising to the sustainability of NGO and the impact of relationship marketing in establishing lasting relationships between NGO and all its stakeholders. The data collection of the latter is achieved through the application of the interview technique, to which content analysis will be applied as a method of analyzing the results. The main results of the research demonstrate the need for NGO to rethink how they interact with their audiences, especially business patrons, in order to build their loyalty and be more successful in their fundraising activities.

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INTRODUCTION

Competitiveness assumes as a growing phenomenon and quality and innovation are a priority in the business world. Consequently, organizations express the need to create mechanisms capable of providing added value to consumers and occupying a better position in their minds. It is in this perspective that relationship marketing emerges as a strategy of loyalty and creation of strong links between organizations and their consumers. At first, marketing was seen only as a tool to sell a product and the strategies used were mainly above the line, based on massification (Kotler, 1999). The changes brought by globalization and opening up markets on a global scale, not only increased demand, but also boosted supply growth. People now have a wider range of options to choose from when buying a service or product, that contradicts the idea that the foundation of marketing is simply selling to a mass audience. Therefore, at the end of the 1950s, the concept of market segmentation emerged, becoming a priority in the planning of the marketing strategies of organizations. In this context, the below the line strategies are adopted, which promote a more targeted and integrated communication with the target audiences. The appearance of the concept of relationship marketing is proof that the scientific researchers of marketing is attentive to all these developments, having relationship marketing come to fill an existing gap in marketing and giving it a more humane character (Marques, 2014).

People are no longer only concerned with monetary issues, becoming more demanding and valuing more the emotional essence of the brands and of the organizations with whom they are in contact. The search for emotion, social experiences, affective bonds and interpersonal relationships has also resulted in the significant growth of relevance given to the third sector of society, composed of non-profit organizations that do not intend to conceive profit, but also cannot generate injury, whence the importance of fundraising (Jorge, 2017). Finally, the chapter will be developed using a qualitative methodology, through in-depth interviews (structured and semi-structured) to a non-profit organization and three her partners. This chapter focuses on relationship marketing, communication and fundraising (e.g., a Portuguese context). The authors also consider some implications for management, as well as give suggestions for future lines of research.

BACKGROUND

Relationship Marketing and the Loyalty of Partners

Despite an existence of a broad bibliography focused on the area of marketing knowledge, there is no consensus as to when it emerged effectively, and there are several theories surrounding its origin. According to Marques (2014), marketing, as an area of knowledge, emerged only at beginning of the 20th century in north-eastern universities due to the need to develop solutions to the problems in the distribution processes faced by companies.

Furthermore, the concept of marketing has undergone several transformations over time, because of the evolutionary process of societies and the development of the market itself. As a result, various marketing definitions have emerged, and the existing definitions of this concept do not completely cancel each other out (Sousa & Magalhães, 2020). On the contrary, they complement each other and should be analyzed taking into account the social and economic context in which they arose.

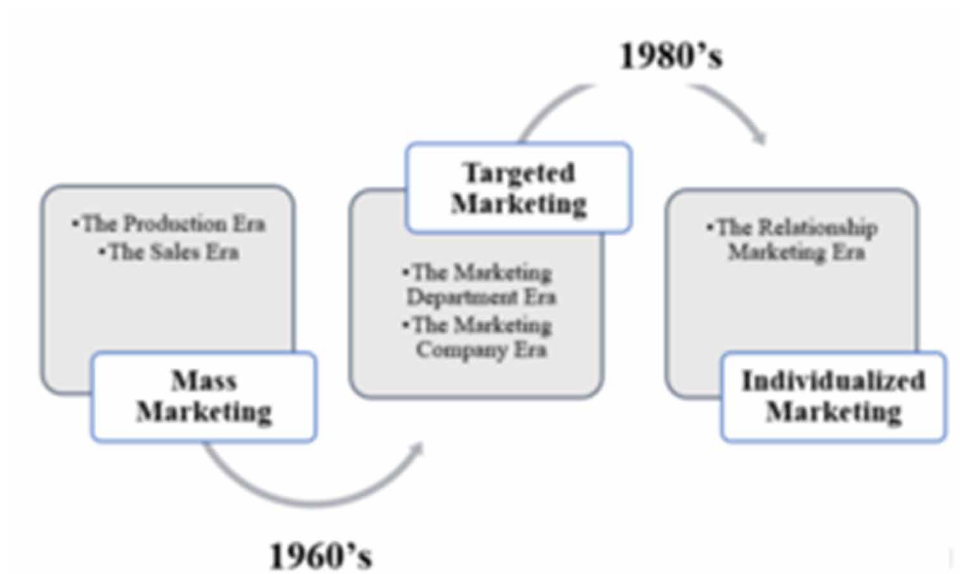
Note, then, two marketing definitions in two distinct moments of history (Gomes & Kury, 2013):

- Marketing is the process of planning and executing the conception, pricing, promotion and distribution of ideas, goods and services to create exchanges that satisfy individual and organizational objectives;
- Marketing is the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large.

According to Marques (2014), from the beginning of the 20th century to the 1990s, one can understand the evolution of Marketing through the approach of the four "Eras" or "Business Guidelines", which are:

1. The Production Era;
2. The Sales Era;
3. The Marketing Department Era;
4. The Marketing Company Era.

Figure 1. The Evolution of Marketing
Source: Adapted from Marques (2014).



With the Industrial Revolution, which began in 1780, and the consequent improvement of production mechanisms, the standardization and massification of products became the priority of industries, with emphasis on production processes and cost reduction, as a way of achieving a strong market position (Guimarães & Brisola, 2002). In addition, the Industrial Revolution boosted the improvement of the transport and communication infrastructure sectors, culminating in the urbanization of people's everyday lives and the rise of an industry-focused capitalist economy. In this context, companies began to focus on mass production and the improvement of their products at the technical level, but without worrying about the real needs of consumers, a phenomenon called "marketing myopia" (Kotler, 1999, p. 12).

The technological evolution as a consequence of the First World War also had a major impact on the industrial sector. The advances of the technologies that supported the war strategy of the countries involved in the conflict were harnessed by the Industry (Kotler et al., 2010), originating a great advance in the sector with the substantial growth of the production volume. With the Great Crash of 1929 and the economic downturn, the large volume of production became a problem, as there were many products in stock that were not sold. Up until now, it was the Production Era, the Marketing 1.0, which the goal was to produce standardized goods on a large scale, in order to reduce production costs.

After the Wall Street Crash of 1929, companies began to adopt a sales-focused position. At that time, the purchasing power of the population suffered a great decrease, leading people to be more restrained in their spending. In addition, the priority of industries was then to sell stocks through the forced sale of products and the strategies as sales promotion and mass advertising. Thus, a new reality arises where supply prevails over demand, so the commercial effort was made from a push perspective. In the 1950s, the Marketing Department Era began, where companies adopt market orientation. With the end of the Second World War, there has been a great technological advance that has spurred the emergence of new energy sources and new communication channels. All these developments have made consumers more informed and demanding, where the rigorous analysis of the options available before making any purchase has proved to be a common and systematic practice. In this context, Barreto and Honorato (1999) asserts that the companies started to adopt a new way of acting in the market, worrying more about the real satisfaction of the needs and the interpretation of the wishes of customers.

Currently, we witness the emergence of Marketing 3.0, or the era focused on values. According to Kotler (2010), the increasingly competitive market and the more unpredictable consumers require companies to treat consumers differently, who should be treated not only as consumers, but as real human beings: mind, heart and spirit. From the 1990s, a new paradigm arose, which gave marketing a more relational character. Then, the concept of relationship marketing appears, which consists in the creation of relationships with customers and business partners, and the respective maintenance of the same, always in order to achieve the objectives of those who are involved in the relationship (Grönroos, 2000).

After this analysis of the evolution, it is possible see that marketing has taken different approaches over the years. In the 1950s, mass marketing aimed at a homogeneous market was practiced. In the 1970s, the public was targeted and a market analysis was carried out in order to understand the real needs and desires of consumers. Since the 1980s and 1990s, marketing has aimed to develop close relationships between companies and their customers (Marques, 2014). Relationship marketing, which can be applied in any company, has thus emerged as a consequence of the intense transformations that have occurred in the economic and social panorama, as a result of changes in the desires and needs of consumers and of the strong competitiveness that exists in the market (Monteiro et al., 2020).

Determinants of Customer Loyalty

The competitiveness installed in markets, already mentioned in this work as a background to numerous changes in the marketing field, it triggered a remarkable transformation. For example, marketeers and administrators have begun to focus their attention on deep consumer analysis in order to understand what the true sources of value to them are. According to Shoemaker and Lewis (1999), customers are loyal to a company when they believe that it is capable of satisfying their needs at a level higher than competing undertakings. Therefore, it is relevant that all companies invest in its continuous improvement, so that they meet the real needs of your customers.

Marques (2014) assumes as determinants of loyalty to satisfaction, trust, quality, customer services, communication, human resources, complaint management, ICT and relational value. According to Marques (2014), satisfaction is a global appreciation based on the purchases made and the consumption experience of a certain good or service, which comprises the comparison between the expectations created about the ability of the product or service to satisfy your needs and the perceived performance after purchasing the product or service. On the other hand, trust consists in the belief that the organization will offer advantageous benefits to the consumer in response to the purchase or provision of the service. Like satisfaction, quality is also related to consumer expectations, more specifically, by overcoming those (Roseta et al., 2020). The greater the capacity of a product or service to exceed the expectations that the consumer has, the greater the perception of quality. Customer service corresponds to assistance technique provided, fundamental in establishing a more direct and personal contact between the seller and the buyer (Oliveira et al., 2020). Nevertheless, all loyalty relationships between organizations and their current and potential customers should be supported by a regular and broad communication strategy with respect to the subjects covered. According to Marques (2018), a continuous and transparent communication between the two parties will increase the level of loyalty between them, and communication should also be seen as an important problem-solving mechanism. Even so, consumer loyalty doesn't always derive from a history of relations with the company without negative events between them. It's true that loyalty is more easily achieved when business partnerships always have positive results. However, this is not always the case. There is a possibility of failures and complaints that result in dissatisfied customers (Veloso et al., 2020). However, effective complaints management can be a tool that promotes consumer loyalty, since the resolution of failures and the management of complaints is capable of transforming customer dissatisfaction into satisfaction. However, it is crucial that organizations are aware that the management of a complaint cannot focus only on the refund of monetary amounts, but mainly on intangible aspects, such as the speed of response, the flexibility shown in solving the problem and honesty (Marques, 2014). Additionally, the introduction of technology in business processes has promoted the effectiveness of marketing strategies, driving a greater connection between companies, employees and customers, which in turn, contributes to maximizing the perception of quality, increasing loyalty (Marques, 2014) and the competitive advantage of the organizations themselves (Islam et al., 2019).

On the other hand, the determinant of loyalty regarding the relational value can be defined as the evaluation that the consumer makes about the costs and benefits that he acquires with the continuation of the relationship with the organization (Marques, 2014). Reichheld (1993) suggests that as customers become loyal and loyal to the organization, the lower the costs of the organization, which translates into a succession of events favorable to the structure of the company itself. Therefore, courtesy coupled with professionalism at the time of service is an essential mechanism in the development of loyal relationships (Oliveira and Dutra, 2002; in Marques, 2014, p. 92).

Fundraising

According to Jorge (2017), the fundraising concept emerged in the heart of English culture. The fundraising concept lacks a specific chronological reference regarding its appearance. However, the neologism presented does not raise much discussion at the time of its definition. In fact, there is a consensus in the numerous known definitions, as observed:

- "Fundraising is the way in which non-profit organizations organize themselves to obtain subsidies and contributions to their organization" (Abreu, 2009, p. 15);
- Fundraising refers to direct fundraising actions for the development of organizations activities (Cardoso & Sousa, 2020).

The political and economic situation in the world has led the State to reduce aid and funds channeled to the entities that constitute the Third Sector, requiring them to find financing alternatives that will enable them to remain in the community. Thus, fundraising is assumed as a solution to the decrease of support received by the non-profit organizations, through the raising of financial resources, or not, fundamental to its development (Jorge, 2017).

In order to ensure its sustainability and autonomy vis-à-vis the State, all institutions belonging to the Third Sector should establish an action plan that defines the strategies to be used to increase their revenues, such as attracting new partners, investments and donors, all of which are fundraising.

In this way, fundraising is intrinsically linked to the concept of philanthropy, reflected in helping others through donations, in order to minimize the inequalities that are characteristic of today's society and to promote greater social justice (Jorge, 2017).

When analyzing the concept of fundraising in the Portuguese context, we conclude that it is not mentioned very often. From this point of view, Almendra (2014) highlights the absence of empirical studies in Portugal on this theme, which is added to the organizations' little familiarization with the fundraising principles and practices. However, even without this assumed connection with the concept under study, organizations already adopt, in their daily lives, fundraising approaches as strategies to increase their resources, which have been reduced in view of the decrease in the support given by the State.

For the fundraising process to be advantageous, the non-profit organizations management must invest time, money and human resources, so that the strategies used attract the largest number of donors and donations. In addition, it is essential that all donors have full knowledge of the purpose of the donations they make available to the organization, thus avoiding distrust in the organization and the rumors about the misapplication of donated amounts. Besides that, it is important to organizations being aware that the impact of donations will only be felt in a medium- and long-term perspective, and that the success of a fundraising process depends mainly on the organization's ability to attribute an emotional dimension to the donations received, thus promoting creation of an affective bond with donors (Almendra, 2014). Thus, more than having a social cause worthy of donations, it is essential that organizations carefully plan their fundraising action, choosing the strategies that best suit their mission and that are conducive to the effective call of donors (Jorge, 2017).

The art of Fundraising

According to Melandri (2018), there are three ways to increase fundraising: i) look for new donors, ii) increase the average donation and iii) increase the frequency of donations. Observe, then, what each one consists of:

Look for new Donors

Looking for new donors is to grow the donor list. For the sustainability of a non-profit organization, attracting new donors is a very important action. However, it is essential to be aware that the process of attracting new donors is much more complex and expensive than the process of retaining donors that already existed in the past. This reality is linked to the fact that there are no guarantees that people who are interested in the cause will become regular donors and make regular donations (Melandri, 2018).

Increase the Average Donation

According to Melandri (2018), this is intended to increase the amount given in each donation. In terms of costs, this strategy is much more profitable than the one previously presented. It is reiterated that the costs associated with trying to increase the average donation of each donor are significantly lower than attracting new donors, a consequence of the relationship that already exists between the organization and the donor, which minimizes, for example, the expenses with the communication. In this context, asking for a second donation from a donor who has already donated, that is, from an acquired donor, is much more advantageous than looking for new donors.

Increase the Frequency of Donations

This way of growing fundraising is to encourage the loyal donor to donate more frequently. According to Melandri (2018), this is the most overlooked point on the part of the non-profit organizations, which, according to the author, is a reality that should be changed, because when donors increase the frequency of their donations, it is foreseeable that they also increase the amount donated.

Fundraising Strategies

As in marketing management, where the strategies to be implemented are studied and planned by a marketing professional (marketeer), with deep knowledge in the area, fundraising should also be so. The fundraising function should be entrusted to a fundraiser, that is, someone whose function is to draw up a strategic plan for the non-profit organization to increase its revenue volume, in order to guarantee its sustainability, and to strengthen relations with all its solidary partners (Jorge, 2017). Therefore, there are several fundraising strategies that can be adapted. As an example, attracting donors, creating partnerships, organizing events, selling merchandising, applying for Funds and Programs and using Customer Relationship Management (CRM) techniques can be referred to as fundraising strategies (Kasri & Putri, 2018).

Like marketing strategies, fundraising strategies must also be analyzed taking into account the specific case in which they are used, with no more effective and viable strategies than others. In this way, the strategy must be adopted taking into account the intended objectives and following the molds of the organization and its principles. Despite what has been mentioned, it is essential to monitor the strategies implemented, in order to resolve the flaws that may arise at the time of their implementation and to increase the results.

Ethics in Fundraising

Despite the altruistic character easily attributed to fundraising, the issue of ethics must be analyzed. It is in non-profit organizations that fundraising is most present. However, it is not the only circumstance in which it is used. Previously, fundraising only focused on support for nonprofit organizations, a circumstance that has changed recently, also referring to people who put into practice projects capable of generating social value (Melandri, 2018).

The increase in the levels of poverty worldwide and the greater awareness of today's society in the face of the problems of the new century, culminated in the emergence of numerous causes of a social nature, not only within non-profit institutions, but also within independent individuals. As a result of this new reality, the growth of people specialized in fundraising, the so-called fundraisers, highlighted the need to reflect on the ethics present in performing the functions of this new group of professionals. Thus, Melandri (2018) defends the fundraiser as a true profession, holder of rights and duties, of which the performance of tasks in an ethical way stands out. In fundraising, fundraisers have access to a large set of information about donors, and it is important to define the ethical limit for the use of that same information, which can be done through three possible approaches: i) the functionalist approach, ii) the deontological approach and iii) professional approach.

First, the functionalist approach focuses on reputation. In other words, the fundraising professional acts correctly for fear of seeing his reputation jeopardized. In turn, the deontological approach defends that the fundraiser performs its function taking into account its own code created in the universe of fundraising specialists, and the data received from donors will be treated taking into account the rules, rights and duties of this group of professionals. Finally, the professional ethics that grant fundraisers the perspective that fundraising is not simply a profession, but rather a vocation, making them perform their functions transparently and motivated to continue working for a greater cause (MacQuillin & Sargeant, 2019).

Marketing Strategies in Non-Profit Organization

Non-profit organizations finance themselves, either through incentives given by the State or through donations by private sector organizations or by private citizens. For this reason, it is necessary to constantly attract the attention of all those who contribute to the survival of these organizations, in order to maintain or reinforce the number of donations received. The essence of marketing is to attract customers or, more generally, to attract audiences, and it can be defined as a strategy to be taken into account when creating partnerships in the context of non-profit entities and in the actions of fundraising.

As in all circumstances when marketing is used, there are also strategies in the non-profit organizations that are used more often, thanks to their greater profitability, in other words, their greater ability to maximize adherence to a cause and the adoption of an idea or behavior (Andreasen and Kotler, 1982). According to Andreasen and Kotler (1982), the marketing strategies applied in this context should essentially focus on treating people individually, through a more personalized and targeted communication, which proves to be a draw for individuals to be more inclined to help a given cause.

In this context, the contribution that relationship marketing may have in raising funds, attracting partners, as well as donor loyalty is highlighted. Third Sector entities do not aim to make a profit. However, there are always expenses associated with its existence, which can be mitigated through the establishment of strong relationships with its audiences, hence the importance of, also the institutions of the Third Sector, retaining their customers, a fundamental principle in relationship marketing. In the perspective of Manzione (2006), Third Sector organizations have become increasingly focused on marketing activities in a more professional dimension than in previous decades. At the same time, the non-profit organizations have also been evolving its fundraising techniques, which results from the increasingly deep knowledge they have about the fundraising area. However, the author clarifies that marketing in non-profit institutions is not restricted to fundraising actions, which are insufficient to attract the necessary investments, since they are not the most suitable mechanism to make known the purpose of donations, for communicate organizational objectives and plans.

On the other hand, the superiority of marketing in this regard is recognized. In fact, the use of marketing strategies in the Third Sector, which in this case is not intended to sell something, but rather to get to know the market in which organizations operate, is opportune for them to adapt the contact they establish with stakeholders. Despite the growing importance given to marketing in the Third Sector, its management and planning face several problems that compromise the good results of the marketing strategies used. Of the challenges that marketing managers experience in the non-profit organizations, Tenório (2015) highlights the inexistence, in most cases, of a clear and well-known mission for the entire universe of the organization, which makes it difficult to define objectives and actions to be implemented, as well as to evaluate the results. Nevertheless, the author assumes as a barrier to the application of marketing in the non-profit organizations, the lack of professionals and financial resources necessary for investment in this area.

The marketing area assumes itself as a very comprehensive area, which is why it is subdivided into multiple dimensions, aimed at a specific audience and with different objectives, thus creating a varied number of marketing typologies, such as marketing industrial, cultural marketing, social marketing, relationship marketing, among others. Many authors emphasize the prominent role that relationship marketing assumes in the day-to-day life of non-profit organizations, defending its application in this context (Manzione, 2006). The non-profit organizations, despite having characteristics that make them distant from the other organizations of the Second Sector of society, that is, the sector oriented to the market and commercial exchanges, also use marketing strategies to reach, in the desired way, the attention of the stakeholders, such as relationship marketing and communication strategies.

Regarding the communication tool, it is essential for a non-profit organization to be able to create close relationships with all stakeholders. As it is noticeable, it is through communication that Social Sector entities are able to make their mission, vision, values and objectives known to the surrounding community, naturally encompassing their internal and external audiences. However, communicating effectively requires well-executed strategic planning, namely the definition of the message to be transmitted to the target audiences, the amount available for investment in communication actions, as well as the mechanisms for evaluating the results.

According to Santos (2018), also in non-profit organizations, Reputation, Identity and Image have an indisputable relevance in their value proposal, and through these three concepts, made known through communication, that a non-profit organization adopts a position of credibility with stakeholders. It should be noted that, when communication is strategically elaborated, non-profit organizations have an easier time maintaining their reputation, transmitting an image framed in the non-profit organizations own identity, which attracts positive feedback from stakeholders and, consequently, drives the creation of stronger relationships and centered on trust with them, the sharing of values among themselves, thus increasing the opportunities for partnerships. Additionally, the same author alludes to the inability that most non-profit organizations have in making large investments in communication. Establishing a communication policy may result in a considerable increase in fixed and variable costs for an organization. However, there are several communication strategies that can be put into practice, whose associated financial costs are low, requiring only time and planning, such as public relations, institutional communication and digital communication. Given this, for communication to be effective, it is not only necessary to invest large amounts of money, the most important thing is to promote an integrated and appropriate communication strategy for all stakeholders, since the use of strategic and planned communication and marketing, allows that the non-profit organizations guarantee their sustainability and commitment to their stakeholders, offering a value proposition for the entire civil society (Santos, 2018). As already mentioned, communication in the non-profit organizations, as in the case of profit-oriented companies, is essential to make known the vision, mission and values. As can be seen, the existence of the non-profit organizations is inseparably related to the mission of each one, which is what helps organizations to define their objectives and the precise mechanisms for reach them.

However, having a mission is not enough, it is necessary to make it known, and communicate it to the entire universe of the organization, in other words, to all stakeholders. It is through the communication of the mission that organizations are able to attract the attention and sympathy of the community in which they operate, facilitating the process of fundraising and promoting partnerships (Santos, 2018). Communication strategies should be chosen taking into account the organization's objectives, with no better or worse strategies than others, since their impact depends, considerably, on the context in which they are applied. Santos (2018) mentions press relations, public relations and presence in the media and digital media, as the most effective communication strategies to be applied in non-profit organizations. However, the message transmitted in all media should be uniform and adapted to each segment of the public, so as not to cause dubious reflections on the organization and its social mission. In fact, the transmission of an imperceptible message may negatively compromise the partnerships established between non-profit organizations and other organizations, and may also have a negative impact on donations from which organizations are beneficiaries.

Finally, the adoption of relationship marketing strategies should aim at exceeding the expectations of its audiences, with regard to the nature of the cause defended by a certain non-profit organization, so that they feel interested in being part of this cause too, and to cooperate in achieving the desired results, from a perspective of long term (Pimenta, 2018). Regarding relationship marketing, its importance is related to the need that non-profit organizations have in retaining their customers, who in this case are not purely customers, but partners. As with Second Sector companies, there are also more and more social organizations competing with each other, although the term competitiveness is not the most suitable in this context, being used to highlight the reality that even donors they have a wide range of institutions that they can choose to make donations from, which forces institutions to develop strategies to maintain long-lasting relationships with their patrons and not see their partnerships dissolved (Manzione, 2006).

In this context, Manzione (2006) also ensures that, when a close relationship with the stakeholders is maintained, they will be attracting them closer to the organization, increasing the chances of retaining them. For this, the organization must be able to emotionally delight its partners, which is achieved through the adoption of relationship marketing strategies. In addition, the author draws attention to the difficulty of measuring the level of customer loyalty, both in the Second and Third Sector. However, the new technologies, more specifically the CRM systems, came to provide a great help in mediation of loyalty, facilitating a more effective relationship between organizations and all of their audiences.

However, relationship marketing strategies, which should be a priority in non-profit organizations, do not necessarily need to be dependent on technology. It is true that ICT makes a considerable contribution, but many other techniques can be applied and that also generate very positive results, for example, network sessions. The important thing is to treat each segment of the public individually, personalizing the relationships created with each one of them (Manzione, 2006). Additionally, Manzione (2006) highlights the relevance of keeping all stakeholders as close as possible, so that they feel strongly connected to the organization and to its entire surrounding culture. Most authors defend the application of relationship marketing in nonprofit organizations, guaranteeing that it is a primary mechanism for the acquisition of donations and for the creation of a good reputation with society. However, the adoption of relationship marketing strategies is not always seen as a positive action. Several authors claim that the use of this aspect of marketing in the Third Sector may call into question the good dynamics of civil society, also arguing that, although relationship marketing aims to establish lasting relationships with its stakeholders, it will always be linked financial issues, compromising the non-profit organizations social mission (Kamau, 2016).

This non-contribution can be justified by the non-professionalization of the people who manage the marketing actions in non-profit institutions, or by the lack of knowledge about the marketing principles, since the actions carried out are simply focused on promotion and sales techniques, and not properly in techniques of marketing (Kamau, 2016). Additionally, a study carried out by Hussain et al., (2014) demonstrates that relationship marketing is beneficial for communicating the vision, mission and values of any organization belonging to the Third Sector, helping to persuade donors, making them believe that the objectives of the organization will only be achieved if they contribute financially through donations, thus ensuring the viability and sustainability of the organization. In the perspective of the authors, relationship marketing does not simply serve to make strong relationships between organizations and their audiences last, but also to increase the competitive advantage over other non-profit organizations. In the view of Feuk (2011), when the non-profit organizations apply relationship marketing strategies in their daily lives, they see the chances of attracting more donors and increasing funding. In this context, Arnett et al., (2003) show that the practice of relationship marketing in the non-profit organizations, as seen in the commercial sector, proposes the communication of bilateral benefits. However, in companies for the purpose of making a profit, the benefits communicated are essentially economic, which is counterproductive in Third Sector organizations. According to Feuk (2011) it is noticeable that donors do not always want to establish lasting relationships with organizations, since donations are often made only to respond to the feeling of social responsibility and not exactly. to establish affective bonds with organizations. Naturally, in order to adopt relationship marketing actions, there must be a relationship between the non-profit organization and the stakeholders, and in order for this relationship to exist, the organization and donors must agree to relate to the other party and endeavor, equivalently, so that it lasts over time (Grönroos, 2007). Grönroos (2007) also states that, for there to be a relationship between non-profit organizations and its donor, it is not enough to have a donation transaction. On the contrary, it is necessary that, on the basis of the donation, there are factors independent of the transition, such as emotional factors and mutual benefits. In conclusion, communication and relationship marketing are, in fact, important aspects to take into account when the non-profit organizations plan their activity, since they are key mechanisms for the strengthening of partnerships between organizations and their donors, which consequently, it drives the increase in donations received (Manzione, 2006). However, for the results of the application of relational and communication marketing strategies to be as expected, it is crucial that the non-profit organizations hire professionals from these areas to manage the entire process of implementing the marketing and communication plan (Kamau, 2016).

SOLUTIONS AND RECOMMENDATIONS

The main objective of this chapter involves understanding a phenomenon, in this case the Relationship Marketing and Communication as a Driver of Fundraising Loyalty and Success in Non-Profit Organization. So, the constructivist paradigm, which can be associated a qualitative methodology, is what will allow to develop a more accurate investigation because the phenomena that are intended to study are from a social nature. Objectives of the book chapter: Understand the evolutionary process of marketing until the emergence of relational marketing; understand the factors that influence consumer loyalty; understand the concept of fundraising; know the ways of doing fundraising and its strategies; know the marketing strategies used in non-profit organizations; Understand whether relationship marketing is an important tool for fundraising in non-profit organizations; analyze how communication influences partners' loyalty and their levels of commitment. This chapter focuses on relationship marketing, communication and fundraising (e.g., a Portuguese context). The authors also consider some implications for management, as well as give suggestions for future lines of research.

In this chapter, the research carried out is exploratory, and the use of this type of investigation is related to the intention of analyzing an object of study that lacks information about it (Vieira, 2002). Another way of characterizing research is through the faculty of its application. In this context, quantitative and qualitative approaches arise. The methodology chosen by the authors was the qualitative methodology. Minayo (2012) asserts that one of the main challenges of qualitative research consists in the difficulty of clearly perceiving the validity and efficiency of the information collected and analyzed, and the methodological process of qualitative nature must be based on the conscious interpretation and understanding of the data in face of the inexistence of a total knowledge of the contexts and realities existences about the determined phenomenon object of study. As qualitative research methods, the literature review and the case study were applied in this work. First, the literature review consisted of reading scientific articles, books and academic documents such as master's dissertations and doctoral theses, where the concepts of marketing, communication, fundraising and the Third Sector are addressed. With the literature review, it is intended to frame the research in a specific interdisciplinary culture and make known the main authors who contributed to its development (Santos, 2006). The case study, on the other hand, resulted from the intention of obtaining results closer to reality, having been carried out by Acreditar – Associação de Pais e Amigos de Crianças com Cancro. The first step of the case study was the collection of information available in digital media about the chosen non-profit organization, in order to have a broader knowledge about it and its partners. Then, the interviews were conducted. Two in-depth interviews (structured and semi-structured) were then conducted with Acreditar and three interviews with business partners. With all the information collected and analyzed details, is it presented next the main results and conclusions. It is divided in five main topics: Relationship marketing and the loyalty of partners; Determinants of Customer Loyalty; Fundraising; Marketing strategies in Non-Profit Organization; The impact of relational marketing on fundraising for a non-profit organization

Čačija (2014) concludes that, in the nonprofit sector, the results of the applied marketing strategies are not fully observed, nor in a dynamic perspective, which is justified by the complexity of the sector itself. In the view of the aforementioned author, the success of fundraising actions is the direct driver of the global success of each non-profit organization. However, for fundraising to be successful, it will have to rely on the implementation of a marketing plan that fully clarifies the procedures for the relationship between non-profit organization and each of its target audiences.

In the context of non-profit organizations, relational marketing strategies bear the responsibility of uniting the organization and stakeholders in order to jointly achieve the objectives outlined and to fulfill the previously defined mission. The author also exposes as a particularity of the practice of marketing activity, the complexity of the Third Sector, since the stakeholders have characteristics very different from each other, which makes it difficult to choose strategies to adopt, culminating in the complexity of measuring the results achieved, which is accentuated by the lack of proper mechanisms to monitor and evaluate the performance of all non-profit organizations, in a global perspective. In other words, each institution evaluates its results based on its own method, which is an obstacle to the reflection of which marketing actions have, or not, an important contribution. Additionally, Čačija (2014) draws attention to the recurring use of the amount of donations obtained, as an instrument to evaluate the performance of the non-profit organizations. In the perspective of the authors, this behavior is not correct, since it can neglect indicators that are really important for the capture of key resources for the sustainability of the organization, such as the loyalty and satisfaction of current and potential donors.

Also, in the practice of fundraising, establishing long-term relationships should be a priority. It is important that fundraising is carried out under the guidance of donor marketing, so that their satisfaction and loyalty is indisputable (Čačija, 2014). Several authors, such as Sargeant & Jay (2004), point to relational marketing as one of the main strategies to attract and keep donors, that is, to extend their useful life. However, for the relational marketing actions to have the expected success, the need to have performance evaluation measures is evident. In addition, it is essential that the non-profit organization is aware of its position, so that it adopts the most appropriate strategies for each segment of the public and in each market in which it operates. The existence of a carefully elaborated relational marketing, combined with a set of measures for the control and evaluation of results, helps non-profit organizations to their missions more quickly and at a level of excellence (Čačija, 2014). In this chapter, we sought to deepen knowledge about the concepts of relational marketing and fundraising, and about the way in which both interact when applied to Third Sector entities. In conclusion, it is worth mentioning the scarcity of bibliography related to the themes addressed in this chapter and which make up the subject of this dissertation, as they are concepts whose study is relatively recent.

In general, this chapter warned the convenience of Third Sector entities to rethink their strategy. It is essential to adapt these organizations to the current world, in order to better overcome the challenges that arise, not only at the economic and financial level, but above all those associated with the ties that the Third Sector establishes with its audiences and community in general. For this reason, it is suggested to awaken the non-profit organizations to the importance of applying relational marketing strategies, establishing a targeted and personalized communication policy and increasing the quality of the fundraising actions carried out, which can be achieved with resources, for example, the carrying out of training and sensitization actions for those responsible for the non-profit organizations on these themes.

In this way, mechanisms will be created to promote relationships in a long-term perspective with stakeholders, which would culminate in the increase in donations obtained and the level of commitment and loyalty of them. The suggestions presented are based on the awareness that the non-profit organizations passivity in alluding to the areas of marketing, fundraising, as well as affective relationships with its audiences, will culminate in the emergence of complex challenges that are difficult to overcome, of which it is important to highlight the dissolution of existing relationships with partners, lack of coherence between the identity of the non-profit organizations and the image that the community has about them, the decrease in donations obtained and the consequent increase in general expenses of the non-profit organizations, which may lead to the suspension of activity of these organizations.

CONCLUSIONS AND FUTURE RESEARCH DIRECTIONS

The present chapter focused mainly on the study of the concepts of relational marketing and fundraising, in order to analyze the impact that relational marketing, in particular, the communication between the organization and its partners, has at the level of non-profit organizations fundraising. The theoretical framework asserts the importance of the non-profit organizations to establish targeted and personalized communication with their stakeholders (Andreasen and Kotler, 1982). For non-profit organizations fundraising to be successful, it is necessary to ensure the loyalty and commitment of stakeholders, achieved through the individual treatment of each segment of the public. Since the Third Sector also has to promote the continuity of the relationships created with its audiences, the literature review draws attention to the contribution made by relational marketing in this context (Sargeant et al., 2004). However, the research carried out revealed the long way to go by the organization studied, in the sense of having a stronger relationship with its stakeholders, based on personalized communication with them. Although they do not practice fully mass communication, promote segmentation of their audiences, and strive to communicate with their stakeholders in a targeted manner, there is still a lot to do in order to assert themselves as a non-profit organization that adopts a relational position with its audiences and the community in general. The truth is that not all partners feel that they receive differentiated treatment, which is not the reason that leads them to make donations and maintain a lasting relationship with the institution under study. The investigation carried out also made it possible to perceive the lack of knowledge, on the part of organization studied, about relational marketing, thus failing to measure the impact that relational marketing strategies have on the loyalty of partners and their commitment, with regard to actions fundraising for this non-profit organizations. Finally, the number of Third Sector entities grows significantly. For the non-profit organizations to ensure the success of fundraising, they have to improve their marketing and communication strategies, adapting them to this new reality. Donors to remain loyal and become loyal and committed to a particular institution, must feel treated in a special way and involved with the cause, and the Third Sector cannot neglect this need.

To conclude, it would be interesting in future work to find out more deeply the reasons that lead companies to cooperate with non-profit organizations and what criteria they use when choosing a particular institution, where they make donations, to the detriment of others. In addition, it would also be pertinent to compare the impact of the same relational marketing and fundraising strategies on different non-profit organizations. Finally, it would also be opportune to study in more detail the internal and external communication techniques adopted by the Third Sector entities.

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KEY TERMS AND DEFINITIONS

Communication: Communication is a process that involves the exchange of information between two or more interlocutors.

Fundraising: Fundraising translates into a set of strategies and procedures developed to raise financial resources from different target audiences, in order to increase the organization's sustainability.

Loyalty: Consideration of the precepts that concern honor, decency, and honesty.

Non-Profit Organization: They are organizations of a legal nature with no purpose of accumulating capital for the profit of their directors.

Relationship Marketing: Relationship marketing corresponds to marketing work focused on the relationship with customers and suppliers.

Third Sector: The third sector is made up of non-profit and non-governmental organizations, whose objective is to generate public services.

Chapter 5
The Digital Realm Blurs the Lines Between Journalistic and Corporate Communication:
The Rubik's Cube as a Metaphor for New Global Strategies

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ABSTRACT

Not only has the digital world removed the borders between local and global communication, affording meaning to the already established "glocal" concept, but it has also blurred the boundaries between journalistic and corporate content, revitalising what has traditionally been known in legacy media as "service journalism." This chapter supposes a continuation of the thought-provoking line of research begun three years ago on journalistic communication and new media, turning to the deconstruction process as a disruptive method to analyze processes, strategies, and trends. If, then, from the perspective of methodology, the focus of attention turns to the structure of the news itself, attending to how new media reactivate the known 5W, and how the conventional news item dies on paper and is 'resuscitated', transformed into the digital medium, and to how we place ourselves before a transmedia news structure that changes from inverted pyramid to the Rubik's Cube, we now go one step further and put the spotlight on the processes of content building in the digital realm themselves.

INTRODUCTION

Where is journalism's dark side now? Not only has the digital world removed the borders between local and global communication, affording meaning to the already established "glocal" concept, but it has also blurred the boundaries between journalistic and corporate content, revitalizing what has traditionally been known in legacy media as "service journalism". In response to the interactivity, hypertextuality and

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multimediality imposed by the new digital communication environments, with a growing multiscreen access and ever more intensive personalization, content production is evolving in online media towards a situation of journalistic pragmatism with a shared objective: responding to the interests and needs of audiences in an increasingly precise and complete way.

In reality, it involves nothing more than recovering the primordial meaning of journalism: being useful, connecting with readers wherever they are, convincing them that what they are dealing with is a product - tangible or digital - that has value and rigor. Traditional journalism but with new rules in which two extrinsic factors converge when selecting, prioritizing and prescribing content: on the one hand, what happens on social networks as a means to measure the concerns and interests of citizens, and on the other, the need to create content that responds to the operating dynamics of search engine algorithms, preferably Google, since they act as a connection between the media and readers.

Due to these two conditioning factors, there is a blurring of the lines between journalism and corporate communication: what becomes important is not so much who is producing the content, whether paid or not, but that it be relevant and timely, filling a gap and a need for information.

“Which shops open on bank holidays?”; “What are Granada’s best restaurants?”; “Essential Zara dresses this autumn”; “Five tricks for making the best mojito at home” ... Dark side no longer; today, it is the media who take the lead to produce branded, sponsored and corporate content because there are readers willing to consume it. In this regard, there is already an evolution underway in journalistic communication, ranging from the way to write headlines, focus information and appeal to the reader, to the construction process itself.

It is at this point we can turn to the Rubik’s Cube as a metaphor for liquid, flowing and interconnected activation of a whole process in which it is the readers, with their clamor for information, who are starting to put the cube into operation and determine the chain of content that will ultimately be produced.

Content for different audiences, moments and contexts, to be distributed through multiple formats and screens, incorporating all of the characteristics and possibilities brought about by digital language. Content placed in the digital ecosystem capable of ‘flying solo’, with global reach, even breaking traditional molds in the physical and temporal realm of media with audiences.

Using these reflections as a starting premise, this article supposes a continuation of the thought-provoking line of research begun three years ago on journalistic communication and new media, turning to the deconstruction process as a disruptive method to analyze processes, strategies and trends. If, then, from the perspective of methodology, the focus of attention turns to the structure of the news itself, attending to how new media reactivate the known 5W, and how the conventional news item dies on paper and is ‘resuscitated’, transformed into the digital medium, and to how we place ourselves before a transmedia news structure that changes from inverted pyramid to the Rubik’s Cube (Trillo-Domínguez & Alberich-Pascual, 2017), we now go one step further and put the spotlight on the processes of content building in the digital realm themselves.

Journalistic communication or corporate communication? Information or advertorial? Information, publicity or opinion? Journalism as a public service or for the spurious interests of the media to obtain a return in the form of profit and audience share? Key to answering these questions will be the fieldwork carried out heading the newspaper *Granada Hoy* –as part of the founding team in 2003 and leading the operation since 2003-; executive and management experience in Grupo Joly in the Subdirectorate for Digital Transformation; and, in JolyLAB, the media innovation laboratory set up by the company as a space for research both in matters relating to contributions, critical debate and work proposals as in those relating to the implementation thereof in the nine newspapers and, especially, in *Diario de Sevilla* as a reference publication.

At the same time, and from a more academic perspective, with this work it is also our desire to put the focus of reflection on corporate communication from a strictly media and journalism-orientated point of view. There has been warning in recent years that studies, research and debates on corporate communication are losing the "centrality" of the relationship with the media (García Santamaría, 2019) "compared to other areas such as law or finance". This occurs with marketing, advertising and public relations, and even affects professional opportunities as reflected by the case of director of communications, a figure ever more distanced from the journalistic profile.

Following the works of authors such as Castro (2007) on the corporate communication boom, Aced (2013) on the challenge of the 2.0 digital realm and the aforementioned García Santamaría on the "new boundaries of corporate communication", we now propose situating the core of the research on the complicated relationships between the journalistic and the corporate, when the expansion of digital communication and the social networks has only intensified all of the precedent processes and difficulties. This is connected, in turn, to these academic, professional and research-specific challenges that experts such as Miguel Túñez and Carmen Costa (2014) compile by way of a manual as "keys and scenarios" that network society imposes on corporate communication.

It is our view that we are facing "boundaries" that are ever more blurred between the corporate and journalistic, and an emerging and well-timed example of this would be, for example, the practice of "newsjacking", which José Lluís Micó and Patricia Coll (2019) dissect in their book "Newsjacking Posdigital: El secuestro de noticias en la estrategia de comunicación". This recently published monograph draws attention to the growing practice of "building brand messages" from "current affairs"; that is, resorting to traditional news as publicity. As we will expound throughout this article, the problem and the practices go beyond "newsjacking" due to the characteristics and dynamics that come into play in the communication processes of the new environment of online media and social networks. These are activation and conditioning factors relating to the entire process that we propose to identify, using the Rubik's Cube as a methodology for analysis and deconstruction.

Justification, Methodology and Objectives of the Study

The base methodological approach, as that which occurs in the most innovative cooking, is that we can rethink everything, breaking with the established ways of doing things and rebuilding over existing constructions. Journalism can also be deconstructed. We could see it anticipated in Jeff Jarvis's essay, *Death to the Mass* (2015), where the author proposes breaking down the article into "assets" and creating personalizable reading itineraries, while it is specifically put forward in the study by members of the Patagonia Transmedia Laboratory with their proposals of innovation in local to global journalism (Rost et al., 2016).

Treating it as a cutting-edge dish, there was a proposal at the time to deconstruct news to adapt it to new media, giving priority to the audiovisual over the textual, incorporating the key digital ingredients - multimediality, hypertextuality and interactivity - and setting pathways and itineraries via links and feedback that would permit both the personalization of different levels of depth and the integration of readers-users in the new communicational paradigm of the digital realm. The idea was that *everything changes so that everything tastes the same.*

In the deconstruction process we propose, the defining elements of the new digital language play a key role, along with the publication dynamics of new media: the liquidity of the digital, the ubiquitous nature of mobile communication and cross-device personalization. Continuing that already explored around journalistic genres, in this work our aim is to put the spotlight on journalistic communication processes to evaluate up to what point the classic axioms of the separation between information and publicity, and journalism and corporate communication, are maintained, when content is subject to the demands of the 'conversation' and noise of the social networks and positioning strategies orientated towards information recovery search engines (with Google as a main player). The objective, therefore, is to identify the forces and agents or actors that drive communication (journalistic and corporate) in the new media realm; to draw attention to those who turn the cogs in the movement of the Rubik's cube.

From a strictly academic viewpoint, we employ an essentially qualitative methodology relating to critical analysis and bibliographical review, beginning from an exhaustive documentary search and compilation in the framework both of the industry of new media and in that relating to journalistic practices from their always difficult relationship with corporate communication and advertising. In this regard, we focus on the impact of technologies and the development of new formats and strategies from a professional perspective, at the same time as putting the emphasis on the interconnection of scientific and academic works published in relation to our object of study. Specifically, to reports and fieldwork produced by the media, as well as by specialized companies and consultants in the media industry. As we have mentioned, it is also essential to gather together all of the experience, analysis and exploration through fieldwork that has been carried out over more than two decades thanks to the interconnection between the private company (in *Granada Hoy* and Grupo Joly), the University of Granada and the Nar-Trans research group.

As a foundation and conceptual perspective, the idea of deconstruction to analyze the evolution of journalistic genres and communication processes in the digital realm takes root in the hypotheses of the philosopher Derrida and the post-structuralist paradigm. Outside the controversial debate on the "mechanical" applicability of the deconstructivist method to other fields, with the subsequent risk of ending up reducing and distorting an innovative proposal to the point of "drowning it in its own success" (Krieger, 2004), we defend the interest and utility that the critical proposal of the modern philosophical discourse has had and reached in other areas of knowledge such as literature, theology, teaching, music and architecture, and thus its applicability in the area of journalism. In this case, the discourse is articulated on the contributions made by key authors such as Salaverría (2005; 2016) and Orihuela (2004; 2015) in the sphere of cybermedia; Gillmor (2004), Jenkins (2008) and Jarvis (2015) regarding media convergence, the evolution of audiences and new narratives, and Boynton (2005) on new journalism.

BACKGROUND: THE NEW PARADIGM OF E-COMMUNICATION AND THE MEDIA CRISIS AS CATALYSTS FOR CHANGE

Incorporation into the digital world has gone from being a fad to situating itself at the core strategy of company development and even survival, especially in the case of the media industry and all sectors linked to the business of communication. Despite initial reticence and suspicion, the media have understood that it is a necessity, and a social demand, to make a serious and firm commitment that has been consolidating and extending itself at a frenetic pace, and which has ended up affecting all aspects of life. A space that is less and less ‘parallel’, which is becoming the center, in a general and transversal manner, of all of sectors, not just in the sphere of communication and the media.

Information has become the ‘oil’ of the new millennium for the traditional players in the cultural industries, where we situate journalistic and corporate communication, but also for the new operators that have exploded onto the media map from nearby sectors such as the technology sector, destabilizing the whole system and imposing new rules of play.

Will the internet kill the traditional press? Will it be the end of the physical newspaper? This debate is no longer exclusive to the papers (from the failed prophecy of Bill Gates for 2010, to the forecast by Philip Meyer (2004), setting 2043 as the date for the death of the press “as the last exhausted reader tosses aside the last crumpled edition”) to infect the rest of the media and anticipate a scene of greater transcendence: Will the Social Networks end up becoming the new communications media?

In the first decades of the 21st century, the newspaper crisis has been joined by a deep and growing discredit that is affecting all communications media: the lack of credibility and ‘spectacle journalism’, so criticized in television, moved to newspapers and flows, unchecked, in the age of post truth and fake news.

As a balance, and at the hand of the expansion of the new technologies and the internet, citizens’ voices are louder than ever. Audiences stop being passive. If the press has, for decades, occupied this democratic role of watchman over political power, of auditor of all power structures and mediator with the public, the scene now has changed, and it is the public who play a ‘controlling’ role as regards the media. The paradigms of e-communication are transformed and the system teeters.

It involves an intensive and growing assumption of Negroponte’s *Digital World* (1995): “Being digital is different. We are not waiting on any invention. It is here. It is now. It is almost genetic in its nature, in that each generation will become more digital than the preceding one”.

Although made more than two decades ago, his predictions are still accurate regarding the dangers and risks that hover over the post-information age. Castells (2001) had the same concerns assessing the consequences of *The Internet Galaxy*, expressing the new communication realm as: “A new social structure, the network society, is being established throughout the planet, in diverse ways and with quite different consequences for people’s lives, according to their history, culture and institutions”. And it is that, as Ramonet also warned in *Internet, the Coming World* (1998), “communication in itself does not constitute social progress, even less so when it is controlled by the big commercial multimedia companies”.

We are advancing in a theoretical paradigm of e-communication towards a hypothetical Web 3.0, understood as the web of common sense: “This time enriched by the integration of a good dose of artificial intelligence, from the systematic and consistent exploitation of the new patterns generated by increasingly (inter)active users, the registration of each and every one of their adventures around the *infocity*, along with the processes of collective intelligence that emerge from the social web’s own dynamic” (Fumero, 2007).

An environment that has also brought with it a deep change in habits relating to the consumption of content in society, a new information diet marked by various conditioning factors (Díaz Güell, 2008) a drop in press syndication, fall in advertising, loss of reader loyalty, audience fragmentation, less investment in information, mediation crisis (citizen distrust of institutions and their representatives), loss of credibility (lack of depth, scarcity of resources), objectivity crisis (excess unconfirmed information), conflict of authority (the public respond with skepticism to the influence of political, economic and social powers).

Such reflections connect with a reality that we have seen confirmed in recent years: it is clear that the information business model is in crisis. Notwithstanding this, we speak of a “business model crisis”, not of a crisis in journalism, as demonstrated with the growing response of users choosing pay content to counteract the noise of the social networks and disinformation, and how in 2020 this has accelerated with the upturn in consumption of information as a result of the Covid-19 pandemic (Cerezo, 2020).

Güell contributed some ideas that we also consider to be applicable to the current e-communication paradigm: information is the product, not paper; the internet is an opportunity for newspapers (information can be distributed and commercialized more cheaply and efficiently); digital media permit newspapers to get close to the code and audiovisual formats; paper will survive, but it will no longer be a mass media, rather specialized for the demanding reader; the business model changes, as does the income structure; publications should be multimedia, journalists shouldn't be; a single medium cannot produce all of the content to be highly competitive in various markets; the solution is in specialization or integration into third parties, companies, users...

Reality, as Salaverría (2015) exposes, the reality is that audiences are over-informed, saturated with information, they receive content from the media in a redundant manner. At the same time, innovation, originality, exploitation of the new languages and possibilities of the multimedia environment are absent from the daily nature of journalistic work, despite the growing efforts from the large groups to recover their space in the media environment from the platform of the so-called innovation laboratories.

It is precisely this scenario of adaptation, readjustment and reinvention that is the framework for the research and reflections undertaken in this work: on the one hand, as a result of the particular dynamics and characteristics of the media environment that we shall look at below; on the other hand, due to the need to rethink and warn about the implications of the new communications processes for users (and citizens).

The Five Surnames of Communication: Digital, Mobile, Interactive, Audiovisual and Transmedia

The digital revolution almost began in companies via a slogan: a "digital first" that soon became a "mobile first", and that continues to grow, adding ingredients increasingly central to e-communication such as "interactive", "audiovisual" and "transmedia". If this is not as a reality that can be generalized, it is as an aspiration towards the already shared conviction in all sectors related to content creation that the message can no longer be one-directional, that the recipient is at the same level as the sender, that the visual code is competing with and displacing the textual exponentially in the new generations, and being able to deploy and adapt content to all possible devices and channels that connect to the public is a strategic (and business) opportunity.

We cannot ignore the fact that journalism is a profession that is closely linked to the sociocultural, economic and technological context, which has continued to undergo changes and adaptations. In reality, human history has always been linked to technology. And, in this setting, journalism has continued to adapt to guarantee its survival. The question, now, is whether we are facing an umpteenth adaptation or a true involution motivated by the elimination of boundaries between mediums, between ways of communication (such as journalistic and corporate, which are the focus of this article) and between text, sound and image, converting digital media into "cybermedia" with an evolutionary path yet to be explored.

The profound transformation process that journalism is undergoing is motivated by the ongoing change also faced by its readers, environment and society as a whole with the uncertainty of the new generations (Torrado et al. 2011). This is also emphasized by Rius (2016) when he speaks of the "big conversation" in which citizens and the communications media have an ongoing participation, a "dialogue" wherein the current social and political agenda is created, breaking the monopoly of the media and journalists towards a "public opinion" arising from the information shared between different citizens. This same idea is the one put forward by Jeff Jarvis, when he alludes to a problem not in journalism itself, rather in the way of accepting it: "Journalism has no end of new opportunities, and our problem is that we have not explored nearly enough of them" (Jarvis, 2015: 107).

"A good story is worthless if it doesn't reach a lot of people". This valuable time that readers dedicate to informing themselves is the main asset of a communications medium" (Serrano, 2014). Orihuela (2015) also draws attention to this, reminding us that "the real battle still has the objective of gaining the attention of the users". Along with their trust, one would have to add. Zuckerberg (2013) asserted in a post that went viral in Facebook: "People influence people... a recommendation from a trusted friend [...] influences people more than the best broadcast message. A trusted referral is the Holy Grail of advertising". Of advertising and information. From the journalistic and also corporate perspective.

As a result of all of this, news companies have assumed a new form of organization that prioritizes digital content with the incorporation of professional profiles to their staff such as programmers, data analysts, computer engineers and community managers. And, very intensively in recent years, experts in audiovisual communication capable of producing content adapted to the language consumed by the new generations. Being audiovisual is becoming synonymous with being digital. And in the challenge of managing communication (journalistic and corporate) the transmedia scenario is already being situated as a synthesis of the challenges that adapting messages to a new, ever more liquid, borderless digital media environment suppose, as we will explain below.

JOURNALISTIC COMMUNICATION V CORPORATE COMMUNICATION. THE DIGITAL ENVIRONMENT ELIMINATES BOUNDARIES

Following the reflections of Boynton (2015) and *The New New Journalism*, with which a number of the most relevant North American writers again resort to fiction resources to project non-fiction, we could ask ourselves up to what point the digital environment of the new mediums places us before a moment of complete reconsideration as regards the journalistic profession. Both in terms of continent and content. That is, regarding the stories we tell in the new media (what is news), to how we tell them (style, genre and narrative), and via which platforms and channels (with the smartphone on the whole being the point of entry).

One way could be to consider the *amendment to totality* we defend in this article, questioning the most basic pillars of journalistic communication. Asking ourselves about the ingredients of the news item in a context of over-abundance of information, instant dissemination, disintermediation and breaking of the classic blueprint of media communication with a radical exchange of the roles of broadcaster and receiver towards this conversation (Martínez-Fresneda, 2016) which, at least in theory, heralds the new media ecosystem.

Assuming the challenge put forward by authors of note in the field of cyberjournalism such as Salaverría (2005), and by the new narratives such as those by Jarvis (2016), when they discern this necessary experimentation that is not now to mark the future, rather the present of the journalistic profession. And all with an intention of initial questioning of the most essential pillars of the profession, and looking back and forth between the job market and academic research.

In this paper we place the focus on the boundaries of journalistic communication compared to corporate communication. And we could say, as we argue in the following paragraphs, that we are walking a fine line between the qualitative and the quantitative.

Journalism Relating to Services and Quality Is Revitalized

On the one hand, the crisis in the media itself (in terms of finance and the model, but also prestige and credibility) is a wake-up call for defending Journalism in capital letters, to strengthen reporting and investigative journalism in the media (where the booming line of work that is fact-checking comes in) and to take advantage of all the opportunities afforded by the new technologies regarding resources to better tell our stories. To adapt them to different devices, to the language of the different platforms and give maximum personalization to the content.

From this point of view we could speak about a revitalization of investigative, precision journalism: the fact that one of the key factors regarding information on the web is hypertextuality, and there are no limits to space (the big problem of traditional media) becomes an opportunity for providing extremely in-depth information and giving readers multiple angles; for offering them the option of contrasting and consulting different sources (including opposing views, even the competition); for including the sources and complete original documents... In the end, the work of the journalist will grow from the perspective of credibility and rigor.

In parallel, leaving to one side the controversial debate about whether Citizen Journalism is "journalism" or not, one of the tendencies of the profession that has seen the biggest growth in recent years is Service Journalism. The effort being made on the part of all information companies to offer a product not only familiar to readers (the spirit of citizen journalism) but which also turns out to be useful and practical, is common. As in the previous case, the lack of a space limit allows for a wide-ranging and precise response to all possible audience demands and expectations.

We shouldn't forget that for readers the internet is also becoming an increasingly essential daily tool. Therefore, it is another opportunity to afford meaning to the profession and cover all these types of need, offering quality service journalism. The multimedia options on the internet also turn out to be in this case a fundamental factor for presenting information and services up to now unthinkable and unacceptable in traditional media.

It is certain that, as in the case of all transformations, the advances and advantages are also accompanied by weaknesses and uncertainties. In any event, it involves the core idea of the era of transformation into which the press sector has been thrown to renovate the digital business model betting in favor of paid subscriptions. In short, the strategy is none other than to bet on quality, on premium and exclusive content, to convince the reader that it is worth paying to have access to the information.

From this perspective, journalistic communication is increasingly approaching corporate communication, in that it is incorporating traditional advertising and marketing strategies with the aim of projecting the newspaper brand as a differential factor.

The Battle for Audiences: From SEO Journalism and Evergreen Content to Clickbait

We were speaking of the qualitative and the quantitative. So, together with the opportunities supposed by this turning upside-down of the essence of journalism itself we have put forward, as a counter-point a growing trend is observed in all media for competing in the digital scenario with purely quantitative strategies. It involves generating content, the more the better, to gain audiences: not only does digital advertising depend on it, but also the paid content project. The biggest connection occurs in these dynamics, where the boundaries between the journalistic come tumbling down.

SEO journalism (Carlson, 2007; Richmond, 2008; Iglesias-García & Codina, 2016) has in recent years become one of the main innovation channels for the media; it has already created a new professional profile with a growing demand for hiring and supposes, above all, an important business strategy. Good stories fly in the digital environment, but so does content wrapped in an appearance of originality, relevance and curiosity.

Nonetheless, the possibilities of connecting with more public, the reach of the subject, will to a large extent depend on our capacity to adapt our story to the new devices with content, language and style aimed at the new audiences. But we must also think about search engines to successfully adapt content to information recovery algorithms, to learn to write for Google and the social networks, if we want to increase the possibilities of readers finding and sharing our information.

To achieve this goal, the media have started to hire SEO professionals (both technical and content creators) and there are cases in which there is even a team specifically dedicated to creating stories and preparing them for good positioning. This type of content lives alongside the news published daily by the editorial department, but also modified and adapted to position it in the digital environment. The awareness of the importance of SEO in the media is now undeniable not just from a business point of view, but also as a clear perception on the part of journalists (Lopezosa et al., 2020).

From the perspective of audiences, however, the perception is uneven. Truly useful content is created but there is also a discrediting in the media of what we can consider as the most extreme side of these practices: clickbait articles. These are eye-catching, surprising or morbid stories published under sensationalist headlines with the sole purpose of getting the reader to "bite" the "hook" and access the content, to be translated into user volume and greater advertising revenue.

Here we could differentiate between 'soft clickbait' content, where reader curiosity about the topic or way of telling it come into play, and 'hard clickbait' which completely frustrates reader expectations, and has ended up becoming a problem for the media due to its tabloid approach.

Within these dynamics of useful content production, we can also include the creation of 'evergreen content': stories that don't lose relevance, and which can be the object of searches by users at any time. All said and done, the final result of the 'Google dictatorship' is an agenda of content in which it is increasingly difficult to discern the journalistic from the corporate. In some cases, information we can include within more traditional service journalism, created taking advantage of the news hook provided by current events: "Reasons and documents to justify journeys during lockdown"; "Lists of shops in the new mall" ...

The initiative when producing these contents can begin from the medium itself or as a result of business communications and campaigns, without it being necessary for there to be any specific agreement or economic benefit. In addition, the topic is treated with journalistic criteria and published as any other content: "How to get a ticket to the Alhambra"; "These are Andalusia's best beaches" …

This is content that only a few years ago did not form part of the agenda setting of the media. However, it is a journalistic production line that could easily form part of any advertising and business marketing campaign. Moreover, on some occasions the same type of content has its origin in the editorial department and, on others, it forms part of the paid content of the advertising and marketing department. "The three best restaurants in Barcelona this autumn": Is it published with journalistic criteria to respond to a possible news demand and position on Google, or is it paid for by the restaurants considered the best? It is impossible to know without asking the medium in question.

All of these developments are advancing in parallel to the evolution underway in the field of marketing and advertising as basic tools of corporate communication: going from advertorials to branded-content, putting into place innovative multimedia and transmedia dissemination campaigns and exploring new channels for promotion around what we might understand as the world of "experience".

The product increasingly becomes an emotion, a story... Event production is consolidating itself, for example, as a space for working and common interest for the media and the big companies (interest in brand projection once again breaks down borders and unites the paths from the journalistic and corporate sides) and storytelling is expanding both with journalistic and publicity objectives (Méndiz, 2017), in this case as a space for innovation and creativity.

If we asked ourselves a few years ago where the boundary was between art, photography and cinematic production, and advertising with the creative campaigns of the big brands, today we must continue this reflection with transmedia production projects that explore all of the possibilities of the new media.

We must also do this with gaming. Media and companies coincide betting on a new relationship with users that doesn't just place them at the center of the message, but also makes them participants and protagonists. Reactivating, furthermore, one of the three original purposes of journalism that have been relegated during the long period of mass media evolution: entertainment. Let's not forget that the profession was born to inform, but also to "educate" and "entertain"; two dimensions that are being revitalized in the new digital environment.

CONTENT PRODUCTION DYNAMICS IN THE NEW MEDIA

Continuing these reflections, we now turn to metaphor of the Rubik's Cube to graphically explain the dynamics of the production of content in the new media. We thus continue the contribution made in 2017 around the *Deconstruction of journalistic genres and new media* (Trillo-Domínguez & Alberich-Pascual), but situating ourselves at the center of the process.

We start out from the challenge posed, both from a journalistic and corporate approach, by a new communication model in which "true interaction" must occur (Askwith, 2007), with an impact on the two opposite poles of the story (creators and public) and with a reciprocal and bidirectional exchange (Tur-Víñez & Rodríguez, 2014: 119) which ends up modulating their participation in the creation of content.

In the new structure, readers are not mere recipients, they form part of the transmedia narration and the so-called User Generated Content (UGC) as the center of the new communication and economic dynamics of the participative web culture (Fernández Castrillo, 2014: 53). As Arrojo (2014) points out, we are dealing with a user who demands immediacy, trustworthiness and greater participation in the whole process, who doesn't just consume (Levinson, 2012), rather, co-authors (Renó & Renó, 2013) and ends up being an ally for the information professional.

We place within this context the idea of transmedia news: we can speak of a story that goes beyond the multimedia and crossmedia, flowing through different channels and devices, incorporating the user into the process and allowing multiple levels of detail. A news story that becomes much quicker, combining elements specific to the audiovisual and fiction to purely informative content in order to, far from reducing their credibility and rigor, serve as a connection and nexus of trust with the new audiences.

Within the framework of these new structures on communication processes, we consider the classic 5W of journalism to be valid, but deconstructed, while proposing a substitution of the Inverted Pyramid for the Rubik's Cube as a hypertextual architecture of content to the extent that we now work with nodes, flows and layers.

We are facing a deconstructed Rubik's Cube in which each player, each reader or user, arranges the pieces according to their interests and needs, deciding how to begin and make the journey, and where they want to go. With the Rubik's Cube we can furthermore integrate these lineal or axial and reticular structures or networks that form the basis of hypertextual writing: from the simplest that supposes linearity and hierarchy to complex nodal structures where the text goes from two-dimensional to three-dimensional (height, width and depth). At the same time, it visualizes much more reliably the idea of "personalized inverted pyramid" defended by writers such as Jarvis.

In this context, Jarvis' idea of the journalist as a guide gains traction, as a "community organizer" of content and knowledge, as the builder of paths at the "service" of citizens and provider of environments of trust, while it would demonstrate a clear transformation in journalistic routines (Luchessi, 2015), in which media and journalists lose the exclusivity both in terms of the production of information and the setting of news agendas (Cerezo, 2016). Users, in our cube, are sources, readers and distributors. The power of the media is diluted and distributed; agenda setting becomes more open and democratic.

We are, therefore, in a scenario in which we have evolved from journalistic production to the production of content with a number of dynamics that are no longer exclusive in the media. From our point of view, the environment, processes and conditioning factors that we have drawn attention to for journalistic content using the Rubik's Cube as a metaphor for innovation and deconstruction are perfectly exportable to corporate communication and constitute, in addition, another key factor regarding this disappearance of boundaries observed between information and advertising.

The 6 Sides of the Rubik's Cube: The Forces That Activate Communication in the Digital Realm

Going a step further in this deconstruction process, we propose refraining from using the Rubik's Cube to identify factors that activate the communication processes in the digital realm. To this end we will put ourselves on the outside and what is more, will do so confirming that the intervening forces suppose new evidence of the confluence between the journalistic and corporate sphere of communication.

F1 Media agenda setting: journalists are the opinion leaders. The professionals decide what news is, with what relevance, how it is transferred to the readers (style and genres), resorting to classic sources of journalistic communication. This side corresponds to a more traditional approach to the journalistic profession and responds to the reality that, outside the innovations, technologies, devices and narratives, the media continue to occupy a central role in modern societies.

F2 External agenda setting: the media manage content following journalistic criteria regarding style, genres and relevance, but the process starts from actors external to editorial departments. Private and public entities, institutions, companies and all types of collectives activate the Rubik's Cube to the extent that they give importance to and disseminate activities that have a social relevance and, therefore, journalistic process. From habitual communications and press releases to announcements and events. On this side of the Cube, the journalistic continues to lead in terms of content management, but a corporate factor intervenes when activating the whole process.

F3 Social Networks: the trending topics of the social conversation via the community creation and content sharing platforms (Facebook, Twitter, Instagram, YouTube and TikTok) and the main distribution systems of digital messaging (mainly WhatsApp and Telegram) occupy an increasingly central position in the media content agenda. On this side of the Rubik's Cube there is now a complete coexistence of media and the corporate in a double sense: monitoring what's happening on the social networks in order to be able to react (thus the growing incorporation of social network experts and community managers both in the media and in the institutional and company press offices) and disseminating brand image-strengthening content.

F4 SEO: algorithms rule; positioning strategies to situate content in the first places of relevance in the main information recovery tools (search engines such as Google and Bing, or aggregators). On this side of the Cube, media and companies compete almost equally in the battle to gain users. One of the main proofs of this is Google Discover, the platform with which the internet giant undertakes a personalized selection of content it considers the most relevant from our own searches and interactions. In theory, it is a feed created for mobile devices of news and service and leisure content but, in practice, advertising pieces are slipped in as if they were news articles. As we shall put forward at the end of the article, rigorous analysis of this reality could be an interesting future line of work.

F5 Advertising /Branded content: one of the basic rules of journalism has always been to clearly distinguish between advertising and information. Hence advertising has assumed distinguishable forms from a visual point of view (both in the press and audiovisual media) and has always demanded an express indication of "sponsored content" or "advertorial" when involving news created journalistically but paid for. It has always been the way of being honest with the reader and ethically defending the fact that journalistic information can never be paid for (or respond to any type of spurious interest).

In the digital realm, it is on this side of the Rubik's Cube where the force that activates communication is corporate and there is a payment agreement between the company and the medium, the possibilities of content creation multiply and formats oscillate between strictly advertising (displays and banners as digital adaptation of traditional publicity) and sponsored content that goes from infomercial to new ever more sophisticated strategies and formats. It involves, for example, the banner that can include an external link to the content in question, but the content can also be hosted on the media's own site. Appearance when showing content is of such importance that the price completely changes: the more it appears to be journalism, the higher the price.

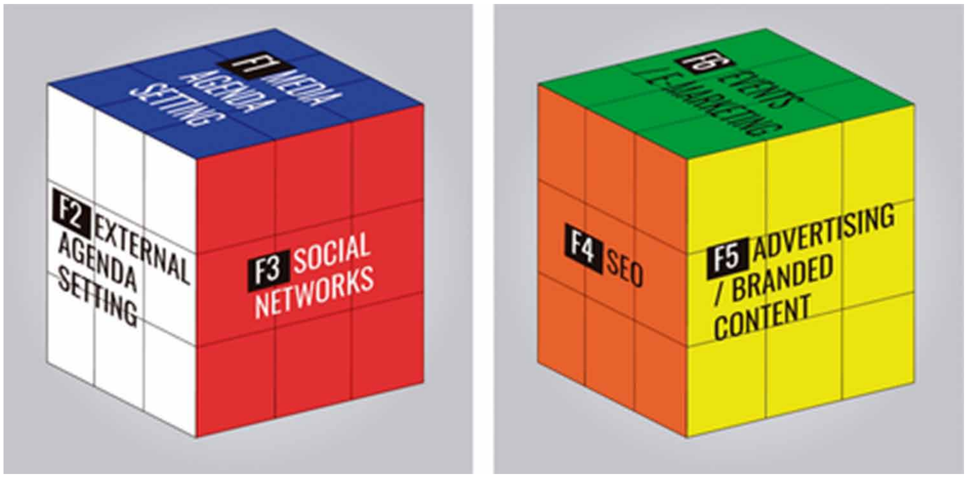
F6 Events- E-Marketing: the production of events with a social relevance, from meetings with public personas to presentations, awards, social initiatives and cultural acts, has in recent years become one of the most interesting lines of business diversification in the media. Patronage and sponsorship have become increasingly common in the media, situating them in the corporate communication sphere.

On this last side of the Rubik's Cube, we see how the force that activates the process is not just blurred, but completely overcome. It supposes a strategic alliance and both the medium and the sponsoring company or entity risk their brand image on an equal footing. These types of initiative normally fall under the big advertising deals in the media, but their development follows journalistic communication formats and strategies.

In the following image we can visualize the six sides of the Rubik's Cube that we have developed with this idea of communication activation forces or factors as if it were a function of the computer keyboard.

But it's not just the 6 sides of the Rubik's Cube that are going to help us identify and interpret the spaces of conjunction and even assimilation that occur today in the digital realm as regards journalistic

Figure 1. The six sides of the Rubik's Cube.
Source: Trillo-Domínguez, 2020.



and corporate communication. If we look at the 8 corners of the Cube, we can also put the focus on the how: analyzing with what type of content these processes are activated.

A1 Journalistic content: of the news story to the report, the interview or the chronicle. The main journalistic genres are maintained in the new media despite them incorporating all of the possibilities that the new interactive, hypertextual and multimedia language of the digital environment offers. From this viewpoint, it is important to highlight the "social responsibility" of the media in the sense that it is not just necessary to publish what could have an important public impact, but also what 'should' be published. We refer to the editorial content, positions taken on the big current affairs topics and the obligation of accountability, critique and social reporting.

A2 Audiovisual content: the audiovisual factor, from traditional photo galleries and videos to the new formats that explore all the potential of the internet, is capitalizing on a good part of the developments in innovation in the media regarding new formats. It also involves a key element for trying to connect to new publics, especially the millennial generation; they are also strategic for the social networks: (above all Instagram and more recently TikTok) and a differential factor for improving positioning on Google. To the graphic element, with new developments also in traditional formats such as the illustration, comic strip and sketch towards the world of transmedia, we can add the booming trend in podcasting. The recovery of voice content, as anticipated by Google, is already being touted as the next revolution on the media drawing board.

A3 Interactive content: the traditional sender-message-recipient blueprint continues to be the basic structure of the communication model but understood as an outward and return path, bidirectional and interchangeable. Such is the importance of placing the reader-user at the heart of the process that content is increasingly being created in the media solely orientated towards giving them a central role. At a participatory level, as is the case for surveys, but also incorporating them into content production from UGC units.

A4 Conversational content (Social Networks): if there's a radical change that the media have had to learn from the politics of communication on the social networks is that it's not enough just to be present, to use them as a loudspeaker and hook to take users to different sites; it is also necessary to listen and interact. We are speaking about the conversation; of there being continuous feedback and constructive interaction that helps to detect fake news and manipulation, that improves the content of the media, that opens new lines of investigation, that draws attention to errors and allows for speedy rectification...

It is a way of understanding "collective intelligence". With the emergence and consolidation of the social networks there has been an opening up of agenda setting, and there is no longer a distinction of who sets the tone of the day: the media, trending topics, users sharing with hashtags and likes...

A5 Service content (SEO): we can understand SEO journalism as a reactivation of service journalism. Never before have there been so many reliable tools in the media for knowing exactly what the demand for information is. We can look ahead but we can also monitor what's happening online, in the competition and on the social networks, to react in real time. The final content that is created, independently of the ultimate motivation behind it or of how close it is to corporate communication, will be relevant in terms of how it responds to a need for information. Wasn't this the origin of journalism?

A6 Advertising content: the digital realm is synonymous with creativity, innovation in narratives and formats, and the exploration of emerging forms of communication. Such challenges are not exclusive to the sphere of journalism; almost the opposite is true, with some of the most intriguing proposals being promoted in the new media being related to the incorporation of audiovisual, cinematic, augmented or virtual reality resources, and come from the field of marketing and publicity. We should remember that we're no longer speaking about products, but emotions and experiences, hence capacity to reach the public has little to do with who's behind the story that wants to be told.

A7 Gaming: you can inform and educate from entertainment; it is key to spreading; to encourage participation; to turn our readers into collaborators. It is legitimate even if the only aim is pure distraction. The newspaper entertainment section has been published for decades with no other purpose than to share time for reflection with readers. The new technologies, the virtual, the interactive and the multimedia offer possibilities unthinkable until now for exploring these new directions. Videogames have perhaps become the most successful development in the media industry, but this is only one line of work, one sphere, by the way, wherein the journalistic and the corporate once again converge.

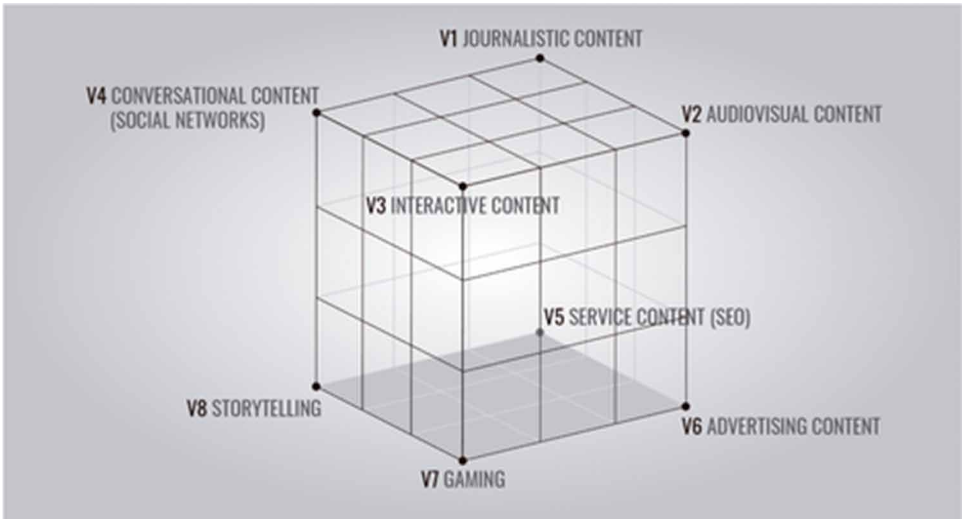
A8 Storytelling: the art of telling stories, with all of the resources at our disposal. Fiction is confused with non-fiction and emotion, suggestion, provocation; it sits at the center of the communication process. It is a way of generating and recovering reader trust, of projecting your brand (be it from the media or a company or entity), of stimulating creativity, of exploring new narrative forms and of reaching the different targets in an ever more precise and personalized way. The public who looks for brands with a commercial objective, the same public who seek media channels to convince them that it's worthwhile paying a subscription to access their content.

FUTURE RESEARCH DIRECTIONS

Once the factors and dynamics that come into play in the new communication processes are identified, we believe it would be necessary to make a gesture to actors in the digital sphere, both traditional and new, academic and professional, in order to continue with studies and reflections in this field that permit the evaluation of the phenomenon we are shedding light upon, along with the ultimate consequences thereof and possible measures of counteraction.

From this point, we think an interesting future line of work could be, on the one hand, to carry out an exhaustive analysis of content on Google Discover to show these distortions between information

Figure 2. The eight corners of the Rubik's Cube: what types of content activate the processes.
Source: Trillo-Domínguez, 2020.



and publicity regarding the communication processes in the digital realm and, on the other hand, evaluate to what point the cybermedia are replicating content and copying each other in a pointless battle to compete with users. Responding, at any cost, to the dynamics of the algorithms of the big search engines.

We understand that, with this work, we are putting the spotlight on a problem with multiple derivatives and implications in the media system that will grow to the extent that the new spaces of journalistic and corporate communication from the digital realm become consolidated with practically interchangeable devices, processes and dynamics. This is the reason why rigorous verification is important, with case studies and quantitative analyses, the dimension of the problem, the consequences for the ultimate recipient of the communication processes (the reader-customer-user) and possible actions to take in the professional sphere.

The study on "newsjacking" initially referred to is, in this regard, an interesting aspect of research that we believe can be extended, completed and expanded upon with new approaches that take into account the different factors and processes we identify in this article on journalistic communication and corporate communication. Furthermore, we consider it to be especially relevant to address the emerging professional profiles being developed to the extent that the cybermedia and communication on social networks are being consolidated (Sánchez-García et al., 2019; Tascón, 2020) and, connected to our study, address emerging developments such as the "brand editor", further proof that corroborates the thesis of this article, and which could be expounded on in new research.

CONCLUSION

The digital world has moved from something on the horizon to being a reality. We are facing a technological, cultural and social change that has shaken the very pillars of the journalistic profession, and even the stability and survival of businesses within the sector. We are talking about a radical change of consumer preferences and habits and, as a result, it shows its translation in the modes of production and the relationships between the media and the people.

What is occurring with cyberjournalism is the opening of a new window to tell much more complete and effective stories, which in itself implies an important professional challenge: uniting traditional values of the press such as impartiality, objectivity and veracity to other values of the new media such as interactivity, hypertextuality and multimediality towards a transmedia horizon. Simplifying the communication process, making the transmission of information much easier and quicker, incorporating the audiovisual language and following the rules of the game imposed by the new users, the increasingly demanding prosumers.

Turning to the Rubik's Cube as a metaphor for identifying the keys to the processes of communication, we believe this paper is an original contribution in ever narrowing spaces, on occasions shared and interchangeable, which exist between the journalistic and the corporate. From the methodological standpoint, we understand the validity of resorting to deconstruction, in order to be able to dissect the forces that enter into play on the new digital media board, as demonstrated. From the perspective of these six sides of the cube that indicate to us what the forces or factors are that activate the movement, along with the vectors that detail what type of content is used to carry out communication. A communication in which "products" have given way to emotions and experiences, where the increasingly demanding and active role of the public coincides, and where the challenge is to offer the best story, on all devices, with all of the resources and in the most personalized way possible.

And all of this from a qualitative perspective, recovering the values and very meaning of journalism; but also, quantitative, given that the battle for audiences is becoming the first competitive battle in the field of the media and the cultural industries.

We believe we are at a key moment for businesses to rediscover their corporate identity, to highlight the importance of journalistic function and professionalism, and move away from exclusively economic or political and economic objectives. Because it is in these times of uncertainty and profound social change that the profession of the journalist, the task of intermediation, is more necessary than ever. When we must reclaim the right of the media to recuperate their social utility and bet on quality, recovering the essential principles of the procession, of rigor and deontological ethics as arms for defending the profession in a context of so much confusion and competition.

And all of this with a commitment to the social function of journalism, for its fundamental value in guaranteeing freedoms for democratic systems, and knowing that it has lost the exclusive dominance in the control of information, interpretation and dissemination, but that we still have an essential role.

From the analysis put forward and the reflections made on the present and future of the media, on its survival in the digital realm and its own social function, we believe we should reach a conclusion of absolute self-criticism and call to attention: it is the media itself that has broken the fundamental pact of differentiating information from publicity, seeking profit in the audience. And it is a dangerous path, because it means undermining the credibility of the media and taking value away from journalism. Is any content valid if it creates an audience? Does it not matter if the content is paid for and orientated by the advertiser or if it is the work of the information professional? Because, as we have pointed out, the more journalistic it appears, the more value it will have for the actors in corporate communication, and more income it will mean for the actors in journalistic communication. Everyone wins? Everyone... except the reader.

Together with these conclusions, which we are able to place within a more strictly media-related context of reflection, we understand that the study we have carried out - using the Rubik's Cube as a methodology for analysis and deconstruction as regards the new communication environments in the digital realm- shows the consistency of the starting point: the classic boundaries between information and publicity, between journalistic and corporate communication, are coming down, with significant (and worrying) implications for audiences.

As we have seen, factors such as the predominance of the audiovisual language, gaming, virtual reality and storytelling are added to the implacable conditioning factors of SEO journalism and the obligation from the social networks to interact, participate and "converse" in order to submerge us in a context where algorithms increasingly dictate, and the limits between the journalistic and the corporate are ever more blurred.

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Section 3

Corporate Communication and Digital Marketing

Chapter 6
Digital Marketing in Times of COVID-19:
An Analysis of the Communication Strategies of Spanish SMEs Through the Web and Social Media

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ABSTRACT

This chapter focuses on an analysis of the communicative marketing strategies carried out by Spanish small and medium-sized enterprises (SMEs) through their digital media channels (websites, blogs, Twitter, and Facebook profiles). The content analysis allowed the authors to identify strategies of inbound marketing and engagement with users on social networks. Regarding the latter, they identify whether the paradox of the positive can be fulfilled. The methodology included, on the one hand, a qualitative analysis of corporate web communications in different social media. On the other hand, the content of messages was categorised into elements of digital marketing. The results obtained show the Spanish web panorama of interaction, engagement, and communication strategies of entrepreneurial SMEs in COVID-19 context, during and after lockdown.

INTRODUCTION

The COVID-19 pandemic led to a lockdown and new social situation that have transformed consumption-related attitudes and behaviors. E-commerce, as well as presence on the web and social media, is becoming fundamental for any business. Even amongst those companies that already have a presence there is a serious risk of loss of engagement with users and potential customers. It is precisely during times of crisis such as these that it is necessary to maintain engagement with clients (Kujur & Singh, 2017) and employ all strategies that facilitate a swift reactivation of commercial relations.

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Small and medium-sized enterprises (European Commission, 2020) have reacted individually, and in relation to the sector they belong to. In fact, there are still sectors today affected by the sanitary restrictions (Manta, 2020).

In this context, businesses have been obliged to be proactive (Hoyos Zavala & Lasso de la Vega, 2017), either stimulated by altruism and social responsibility, or from a commercial perspective that implies considering digital marketing campaigns adapted to these times. Along this second line, supranational bodies (UNWTO, 2020) encouraging and promoting the creation of marketing strategies.

We set out from the basis that both consumers and businesses have acted in different ways during this period of time, as confirmed by studies on customer behavior (Dwivedi et al, 2016); but, how have businesses acted? If they have reacted differently at an individual level, have businesses adapted to the situation of customers? Have businesses from the same sector acted in a similar way?

The scientific problem solved in the paper is therefore presented as follows: How have businesses adapted their content and communications from the digital marketing perspective during the COVID-19 pandemic? Accordingly, the purpose of this study is to determine the role of digital content marketing, through the communication tactics and strategies of SMEs.

BACKGROUND

Businesses are implementing their strategies through digital content marketing (Hollebeek & Macky, 2019). And along with this, they are attracting new customers, achieving engagement (Ashley & Tuten, 2015, Raso, 2016), obtaining lead conversion sales (Kakkar 2017), improving corporate reputation and image (Duhon 2015) and loyalty (Wang et al., 2017). This type of inbound marketing has the advantage of using the communications media that the company itself has on the internet –website, blog, social networks,..– to control and disseminate content. Furthermore, it is possible to design, plan and relate this content in order for users to carry out other types of leads, such as the link to content published by the company on other platforms –so called *relational marketing*.

Background 1: Digital Marketing and Relational Marketing

Communication strategies in the context of digital marketing must include the presence of the information present whose transmission is desired, the selection of the online tools that are to be used (corporate website and blog, and social networks), the type of message desired according to the medium used (blog entry, website article, post, press release, etc.), as well as other factors such as terminology, publication date and time, use of images, etc. Based on the digital marketing objectives – these being attract, engage, retain, learn and relate–, Kierzkowski (Kierzkowski et al 1996) and Parsons (Parsons et al 1998) there is a structuring of the tools available for the achievement thereof –for example promotions to attract, information content, interactive content, loyalty programs, online surveys and chat groups to learn; and customized webpages to relate.

For an enterprising company with the intention of growing, it is important to bring together various types depending on the company objective: e-commerce websites (conversion), community websites (engagement), brand websites (image), corporate websites (reputation), and informational websites (user experience) (Garret, 2010). This growing trend towards relationships through the web – website relationship proneness (WRP)– (Agrebi & Boncori, 2017) is considered by a number of theorists as a feature (Toufaily et al. 2010) and by others as a category (Boisvert & Caron, 2006, Florès & Volle, 2005). However, what is certain is that a potential for high communication is one of the most relevant indicators in innovation processes Dziallas (2020). It is necessary to maintain communication and engagement with customers (Kujur & Singh, 2017), together with the use of all strategies that facilitate a swift reactivation of commercial relationships.

With user interaction with the corporate website –user experience– the aim is to reach three objectives that are quantifiable by the company: visitor acquisition, behaviors, sales. There is no single classification, rather a combination of the marketing objectives for the user experience in the company digital ecosystem –*website, social networks, blog*–. With inbound marketing, knowledge is created and disseminated via quality informative content (Kaushik et al 2014) in order to attract visitors (new and habitual), leads are generated (to gain knowledge about the user and potential customer based on interaction, forms,) and highlight events (users are invited to do something to maintain their loyalty, their engagement).

Background 2: E-Marketing and Inbound Marketing Strategies

Inbound marketing, from a holistic perspective (Halligan & Shah, 2014), attempts to attract potential and existing customers using any marketing tactic that holds attention and attracts with web content, avoiding the rejection of an explicit advert. The objective of inbound marketing is focused on gaining the attention of people and possible customers by including quality content in any format and promoting it via different social media and web search engines. It is based on the idea that "*People do not want to be interrupted by marketers or harassed by salespeople. They want to be helped*" (Bezovski, 2015).

Inbound marketing is gaining ground over outbound marketing due to investments in digital corporate channels such as blogs and social network profiles (Volpe, 2015). As it involves employing marketing techniques during the creation of useful content for consumers and distributing it through digital channels, inbound marketing is divided into content marketing, blog marketing, social media marketing and Search Engine Optimization (Dakouan et al, 2019; Rancati et al, 2015 & Volpe, 2015).

The main aim of content marketing is to distribute informative or quality content to an objective audience in order to drive the conversion - action of consuming – of the consumer (Repovienė, 2017).

To be able to identify the cases according to the different strategies that can be put forward, there must be a conceptual basis for categorizing these web marketing strategies (Costa, 2019). Public relations tools are combined:

- Content with quality information: This can be published on blogs, social network posts, on the website itself...
- Commercial, sports and/or cultural events organized or sponsored by the company.
- News: Novelties relating to the company or its products that improve its corporate image.
- Corporate image: Branding that clearly identifies the company and/or its products.
- Corporate reputation: from a perspective of social responsibility and helping the community.

With web marketing tools that allow the experience of users to be discovered through their interaction: One-to-one marketing, viral (buzz) marketing, marketing relating to permission (newsletters), affiliation and relational marketing that invites users to use more than one means of communication with the company to increase loyalty (engagement) through leads – for example from the corporate website to the Twitter account, from a tweet to the blog or the company catalogue (Burgos & Sanagustín, 2009; Raja, 2020; Rowe, 2019; Wawrzak–Chodaczek, 2016; Wijaya *et al*, 2020).

Background 3: Content Marketing Tactics

To achieve the desired marketing objective, these contents are created with cognitive, emotional and behavioral components (Bowden, 2009, Brodie et al., 2013, Calder et al. 2009; Dessart et al., 2016, Dwivedi, 2015, Hollebeek, 2011, Hollebeek et al., 2014, Hollebeek and Macky, 2016; Schamari & Schaefers 2015; So et al., 2016). Added to this are strategies focusing on rhetoric, audience personalization and stratification, trust, etc. (Kee & Yazdanifard, 2015).

The study of these communications has created the establishment of different theories, such as the paradox of the positive (Johnston et al. 2020), which explains the phenomenon of a negative reaction on the part of users on absorbing messages with excessively positive content.

Background 4: Digital marketing and COVID-19

Lockdown and the COVID-19 pandemic have intensified the characteristics of the liquid society (Bauman, 2015). This fact has brought about a change or modification in the customer experience (Cobb, 2020) and, as a result, marketing strategies have also adapted (Diebner et al. 2020).

The priority now is people, to which the marketing strategy:

- Shows itself as support, care
- Prioritizes employees over business
- Presents itself with ethical values, and the intention of accompanying.
- Helps customers with purchases (conversion) and the provision thereof.
- Uses social networks to get to know customers.

We start out from the hypothesis that the pandemic has revealed how businesses have reacted, on the one hand, at the level of digital marketing, and on the other, at the level of the company as an organization with the capacity to take decisions and act within a society.

RESEARCH OBJECTIVES

This descriptive study aims to obtain fresh and meaningful insights on the adaptation of e-marketing strategies to customers by SMEs in times of Covid-19.

The objectives of this study are:

- Get meaningful insights on how SMEs (Small and Medium Sized Enterprises) are using social media in the sales process during the COVID-19 pandemic.
- Create a review of communicative marketing strategies carried out on the web and social media from the announcement of lockdown to the end of the state of alarm.
- Analyze content and allocate categories to identify aspects that promote engagement with users on social networks.

- Identify, through an analysis, the intention or emotion of social communications on the part of SMEs, and sound out whether or not the paradox of the positive has occurred.

METHODOLOGY

To carry out this study there was an examination of the corporate communication and marketing strategies used in times of lockdown and post-lockdown by SMEs via their websites and social media.

To this end, 75 Spanish SMEs appearing on the *1000 Companies to Inspire Europe* report, created within the Elite program by the London Stock Exchange Group (LSEG) in 2018, were selected for analysis. The aforementioned company is responsible for the London Stock Exchange and has the prestige and reputation for creating an objective list.

The analysis units used were obtained from the primary sources of each of the companies selected in Spanish. These sources or communication environments were: websites, corporate blogs and Facebook and Twitter profiles. The time period analyzed covered the first mention of COVID-19 in the announcement of the state of alarm and subsequent lockdown (March 2020) up to 1 July 2020.

The URLs of the websites for the companies in question were compiled, along with their corporate blogs and Facebook and Twitter accounts. Following this, their websites (home page, COVID-19 sections, news, current topics) and blogs were downloaded, and their Facebook and Twitter publications were captured. Web scraping techniques of the contents that made reference to the situation caused by COVID-19 were also applied to website and blog, Facebook and Twitter publications.

There was a quantitative analysis for identifying companies that created communications or web marketing, as well as the channels used.

The contents were analyzed qualitatively (Lejeune, 2019) with the NVivo program as corporate communications compiled in the different social mediums. The contents were analyzed to categorize the messages (table 1) according to the digital marketing classification (Kierzkowski et al 1996 and Parsons et al 1998).

One or more categories were assigned to each meaning unit, which are extracts of text that may correspond to the complete message -post, tweet or blog entry, or just the title, a sentence or a paragraph. What is significant in this type of qualitative analysis, therefore, is not the number of posts, rather the content mentioned. This permits us to discover whether or not a determined action or strategy has been implemented.

A series of categories (table 1) was established from the classifications reviewed in the background that reflect the communications carried out in the study period.

These strategies can be aimed at one or more digital marketing objectives. In our case, inbound marketing serves both to attract potential customers and retain current ones. Leads allow us to record interactions and the success of the loyalty actions of our customers. These leads provide us with information about customers as well as access, views and, even more so, comments and reactions on social networks on company content for each medium analyzed.

Other categories in the study allude to, on the one hand, actions carried out by the company and, on the other, content published by the SME with regards to the meaning of the message, recipients or the subject in the content of the message.

Table 1. Main categories for the coded marketing and loyalty strategies

Strategy type	Concept	Coded messages
Inbound Marketing	Attraction marketing content, habitually personalized, with the aim of attracting and retaining.	129
Customer support	Already-existing service but can be reactivated or accentuated in this time period.	44
Branding	This general category includes both the reputation of the corporate image via principles of social responsibility (donations, collaborations...) and that of transmitting security (hygiene and safety protocols)	283
Intermediary conversion invitation	The company wants consumers to consume products or services from intermediary collaborators (conversion). E.g., Wine company invitations to bars.	23
Lead	Anything that requires clicking on another event (e.g., JavaScript) on the website in order to facilitate measurement, or introduction of opinions, comments, answers to questions... Includes a wide variety of content covering: games, prize draws, voting, video viewing, links to website sections, links to video...	55
Advertising	Either with or without appearance of personalized advertising. It can involve habitual products and products or services created during the Covid-19 period.	168

Source: Prepared by the author

RESULTS AND DISCUSSION

Firstly, there was an identification of how many companies carried out some type of communication with their customers within the framework of digital marketing.

A total of 449 files were collected from the web scraping process with new text during the period of study, originating from 61 companies. In other words, although files were obtained from 100% of the companies, in 18.67% of cases the contents were unmodified and no communications were made.

How Many SMEs Used the Different Social Media Channels?

100% of the SMEs have a website, though just 52% make some mention of the health crisis or Covid-19. 4% include a specific section on their website on protocols, healthcare measures and other information. The words most used were identified from the content analysis (figure 1):

34.7% use the three mediums compared to 26.7% that use two and 17.3% that have one social media channel. It is noteworthy that 21.3% of the companies lack other social media, including blogs or Facebook and Twitter accounts. Included in this percentage are those companies that provide the means to share the news published on their websites via one of these two social networks.

Over 50% of the 75 companies have an account on Facebook and, to a certain extent, Twitter, and a blog (figure 2).

Our study shows that from the communications made by each company, the use of Twitter was slightly less for the marketing strategies analyzed. Nevertheless, it would be an extremely appropriate channel for capturing information from customers and discovering their tastes and reactions.

The medium most used for corporate communications was the blog in (figure 3), either in terms of specific entries or in announcements in menu-type blog pages.

Figure 1. Cloud of most frequent words in the content analyzed.

The tendency was to use the blog and Facebook as corporate communications media. The use of the digital mediums studied is quite homogeneous, although the use of some social media depending on a specific type of marketing strategy is detected.

Figure 2. Social media use

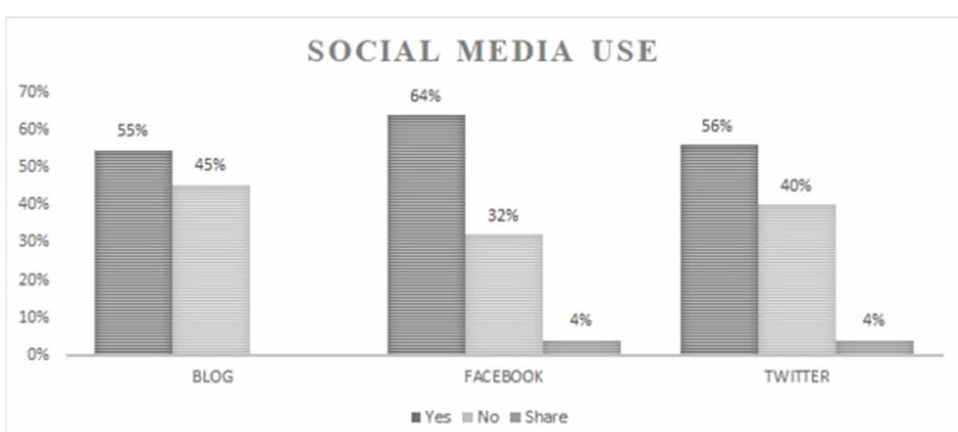
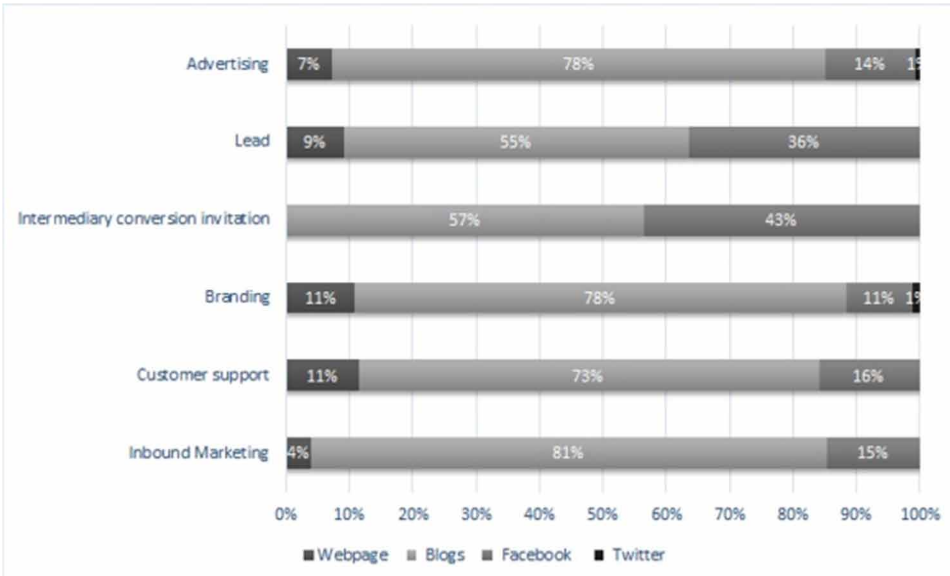


Figure 3. Marketing strategies employed by SMEs according to digital medium (%)



What Were the Marketing Strategies Used and to What Extent?

Terms were searched for on each website that covered the concepts mentioned in March such as Covid-19, coronavirus, pandemic, etc. and which identified content related to the company and the state of alarm.

On the one hand, 18.7% of the SMEs analyzed did not publish any type of special communication during the period of time studied. Added to this figure is the 2.67% of companies whose communications were press releases or advertisements without any apparent marketing objective. As a result, they were not associated with any marketing strategy related category.

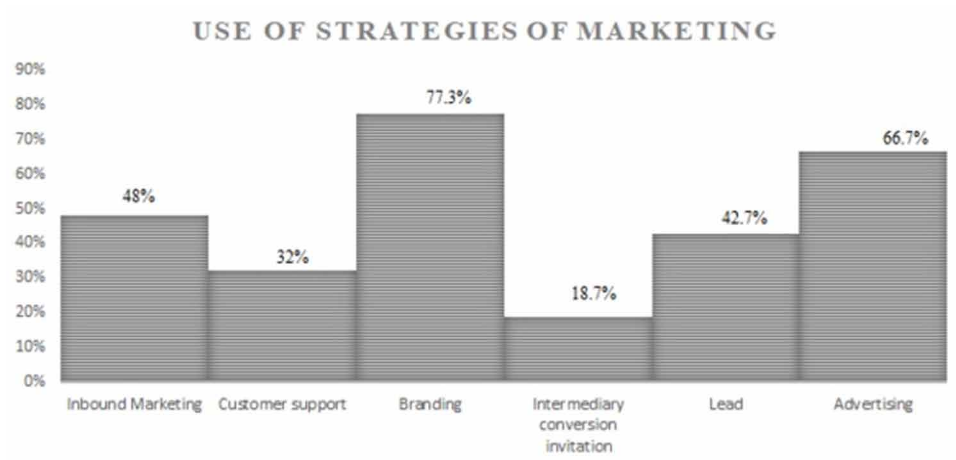
The marketing strategies were divided into six large groups, as set out in the methodology section. Within the group of strategies that a company can employ, the most used was branding in one of its forms, direct or hidden advertising and informative content for attraction and engagement, and the least used was that which seeks leads for intermediaries (hospitality companies, social responsibility events organized by other entities, etc..) in 18.7% of cases (figure 4). The group of leads covers:

- Those related to consumption and the acquisition of habitual products (conversion)
- Those related to entertainment and inbound marketing. (engagement)
- Those related to collaboration with other causes or slogans. (social cause engagement).

The strategies most utilized were branding, advertising and inbound marketing. They provide information about the company and useful content that gains the attention of the potential and habitual customer. They combine the strategies of attraction and loyalty.

At this point 61 companies that had some type of communication during lockdown were taken for analysis. The number of companies appearing under a specific category was quantified. Figure 5 shows that half of these SMEs used four marketing strategies from the six categories. It is also noteworthy

Figure 4. Marketing strategies employed by SMEs in times of COVID-19 (%)



that 100% used some type of branding strategy (95%), following by advertising included in some type of content (82%).

For a pondered study of the content, 1664 analysis units were categorized by type of marketing strategy (figure 6) and were grouped by company. The data show that the most repeated strategies within the different contents published by the companies were usually branding and advertising between 1% and 6% of the messages, compared with the rest of the strategies, which tended to be between 1% and 3% of the contents. That is, the idea of insisting on one type of objective is usually identified with the company image and the advertising of its products and services.

Figure 5. Marketing strategies employed by SMEs in times of COVID-19 (%)

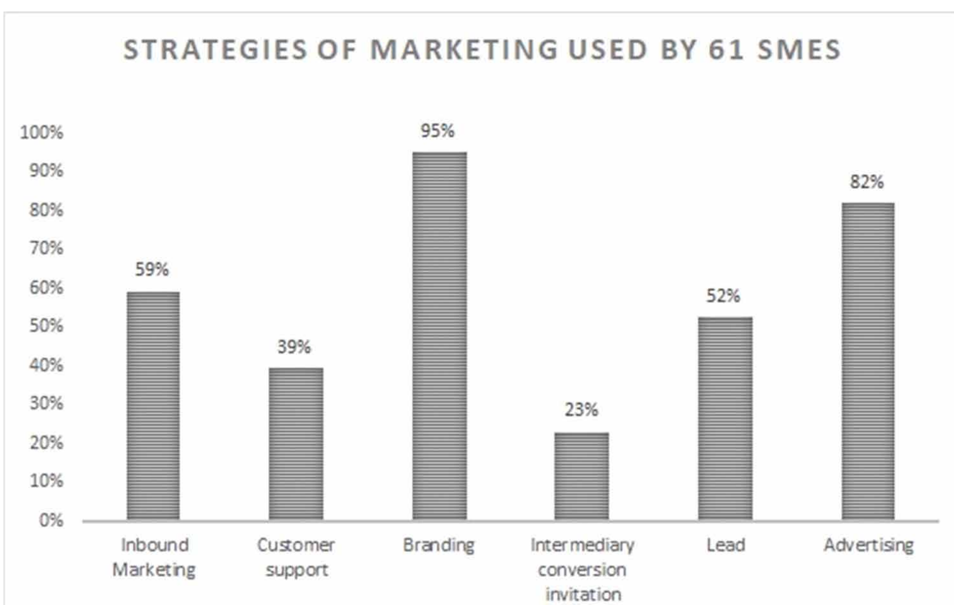
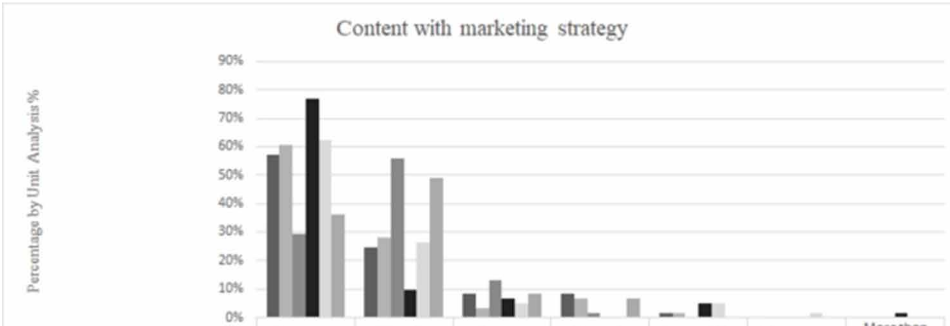


Figure 6. Marketing strategy in analysis units (%)



	No Content	1% to 3%	4% to 6%	7% to 9%	10% to 13%	14% to 20%	More than 20%
Inbound Marketing	57%	25%	8%	8%	2%	0%	0%
customer support	61%	28%	3%	7%	2%	0%	0%
Branding	30%	56%	13%	2%	0%	0%	0%
Intermediary conversion invitation	77%	10%	7%	0%	5%	0%	2%
Lead	62%	26%	5%	0%	5%	2%	0%
Advertising	36%	49%	8%	7%	0%	0%	0%

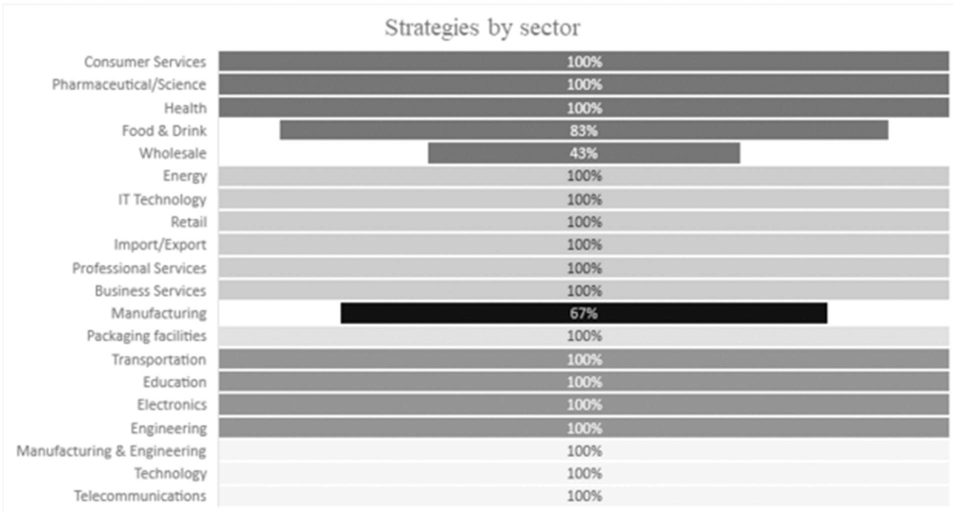
For instance, of the 181 analysis units categorized as “Inbound marketing”, 6% (17 communications or analysis units) originate from the company Florette. The other nine companies most represented in this category are: Aceites Abril (10%), Nortempo (9%), Cofarca, Normon Laboratories (8%), Helios, Masymas Supermercados (7%) and La Masía (5%). This group of companies that most used this strategy are found in the food or pharmaceutical sector.

Of the 25 sectors established by the London Stock Exchange Group, 5 lacked digital marketing strategies during the state of alarm. These were: Agriculture/Farming/Forestry, Chemicals, Logistics, Machining, and Construction/Property. The other 20 are represented by a number of companies going from one to five, except in the case of the food & drink sector, with 30 companies. The upper part of figure 10 shows the five sectors that applied the maximum number of coded marketing strategies in this study - a total of six –, with the proportion of companies from each sector that applied these strategies. We can therefore draw the conclusion from this that the pharmaceutical/science companies (4) adopted one of the six marketing strategies compared with practically 43% of the wholesale sector companies (3). If we keep reducing the number of strategies adopted, we reach the Manufacturing & Engineering, Technology and Telecommunications sectors, which only used one marketing strategy.

We can see homogeneous trends in sectors with little activity regarding the non-adoption of digital marketing strategies during this time period. Following the comments made on figure 7 we can discern the existence of a heterogeneity of underlying behaviors within each sector. For example, the energy sector particularly stands out, revealing that 100% of the companies studied adopted at least one strategy from a maximum of five. For this reason, it was decided to compare the three SMEs from the energy sector as a case study (figure 8).

We could say that the trend in the energy sector follows the general trend, on applying branding and advertising strategies. In contrast, this sector has low activity in digital communications during the period studied with the exception of the company Holaluz, which has a somewhat noteworthy volume of communications. Furthermore, it is discovered that this SME did indeed have intense digital communication activity and increases its spectrum to take in five of the six marketing strategies analyzed.

Figure 7. Marketing strategies by sector



To look closer at better identifying perspectives on the most used strategies -branding and advertising– they were divided into subcategories explained in the methodology.

Regarding company image (branding), the reiteration of the company name in each corporate communication is reflected in 93% of the group of SMEs with communications. Particularly worthy of mention is the fact that almost 50% of the communications referred to in this time period were focused on company reputation and transmitting trust to customers and immediate collaborators.

In some cases, new products and services were being offered as a result of the lockdown situation, especially in 10 of the 25 sectors (figure 10). The advertising strategy is found in content from companies found, mainly, in the food & drink sector – both in terms of products and services–, pharmaceutical and biohealth services and laboratories, and also consumer services... It is noteworthy that, along with the first two sectors mentioned, those related to electronics and information and communication technologies published more advertising than these new products and services.

From a qualitative point of view, there was an analysis of all communications made by the companies and the topics in the content were categorized. In the case of advertising of company products and ser-

Figure 8. Marketing strategies employed by SMEs from the energy sector (%)

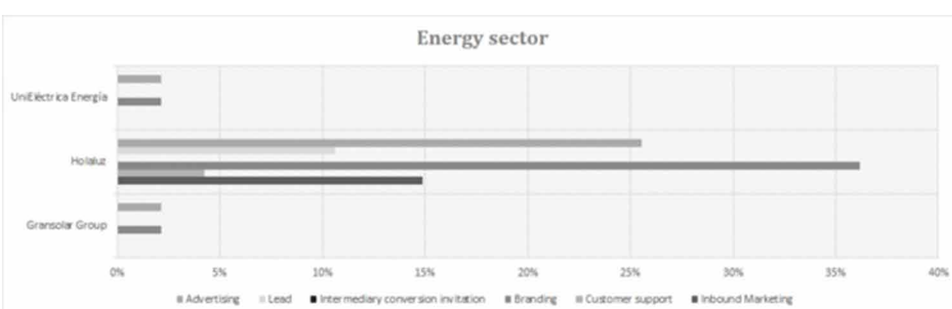
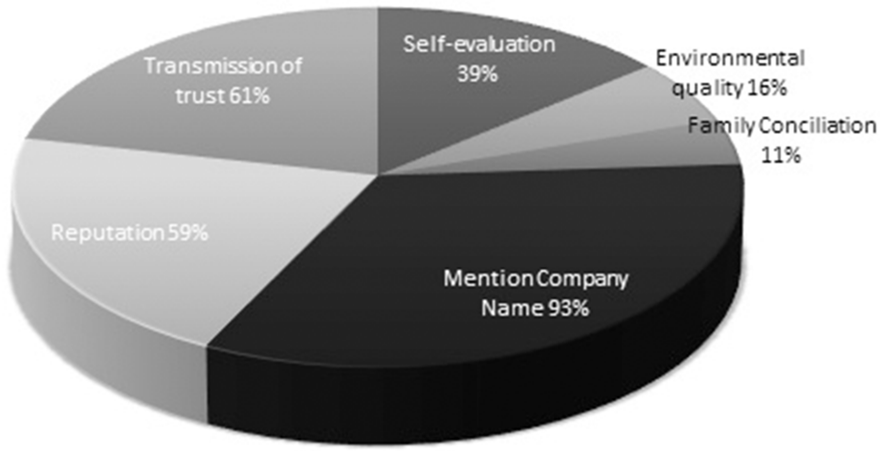


Figure 9. Marketing strategies referring to company image (branding) (% of 61 SMEs)



vices, they were either mentioned explicitly in messages about health, coronavirus and aspects referring to consumption, or services facilitating consumption were advertised (figure 11).

Starting from the total analysis units referring to advertising, the blog was the most used medium for the advertising of both habitual and new products (figure 12). It was confirmed that, of the 139 mentions of habitual products, over 75% were found on blogs appearing with other names such as novelties, news, etc.

However, we analyzed the media based on the number of analysis units in this study. That is, a ponderation of advertising messages via digital media reveals that the publicity of novelties is on the whole

Figure 10. Sectors with advertising (% 61 SMEs)

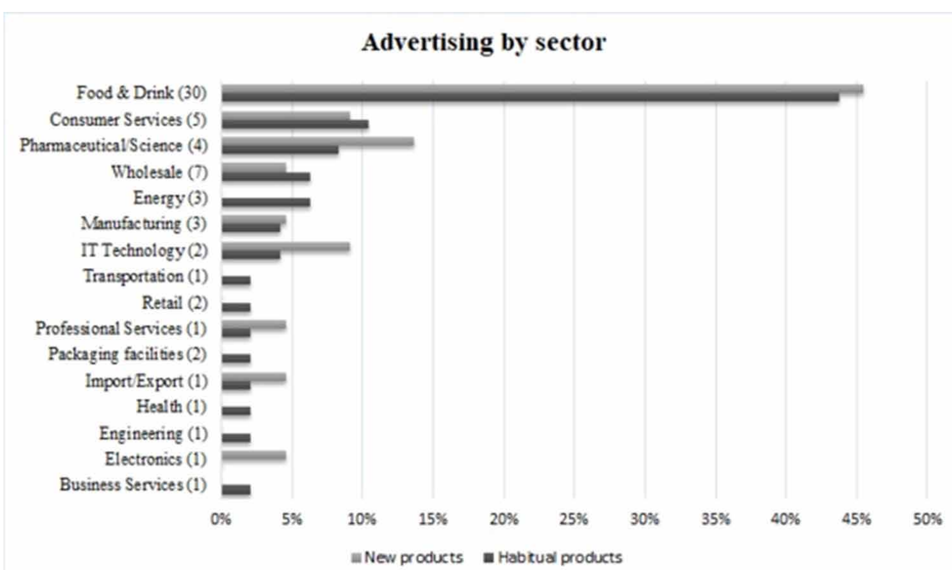
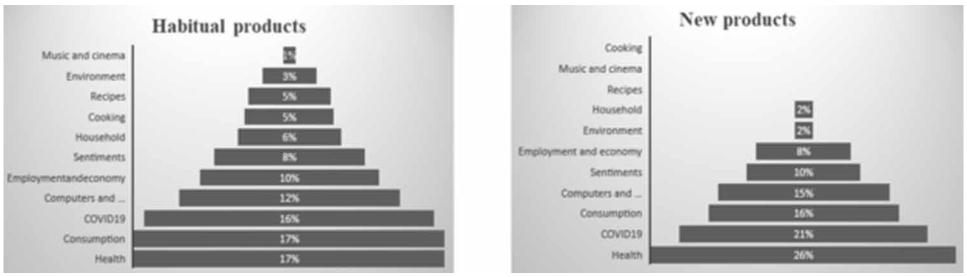


Figure 11. Content topics where advertising is inserted (% 61 SMEs)



carried out on Facebook (figure 13). On the other hand, of the 38 analysis units originating from Twitter, none makes reference to the advertising of new products, and only 3% does so for habitual products.

Each company reacted to the pandemic situation individually. Many of them materialized their decisions in a series of actions that may have been motivated by marketing strategies or the fact that said actions give them publicity and visibility via the contents published on the different digital media of the SME (figure 14).

There are hashtags or slogans that are only used once, either to achieve a lead –e.g., Buy this Leti solidarity balm because #LoVenceremosConUnaSonrisa (#WewillBeatItWithASmile)–, or to show thanks –e.g., #HéroesdeSúper (#SupermarketHeroes) from Supermercados MasyMas

Via our qualitative analysis, there was an enquiry into whether there was any relationship between the communication of these actions on the part of the company and the use of some kind of slogan (figure 15).

Slogans already in existence and popularized via social networks were used in over 50% to accompany messages of thanks. However, to reinforce collaborations and donations made by the company,

Figure 12. Media with advertising mentions (%)

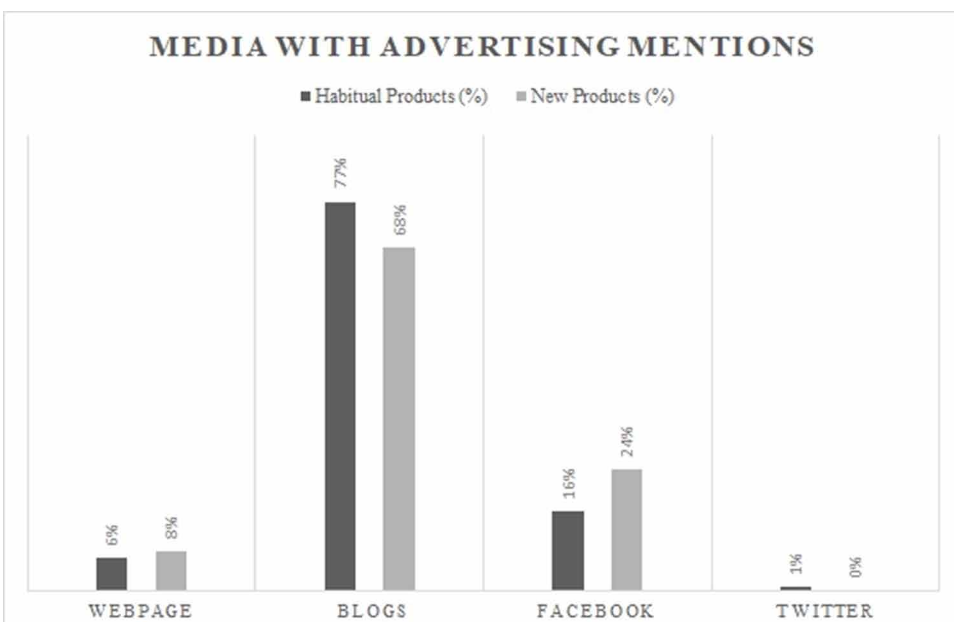
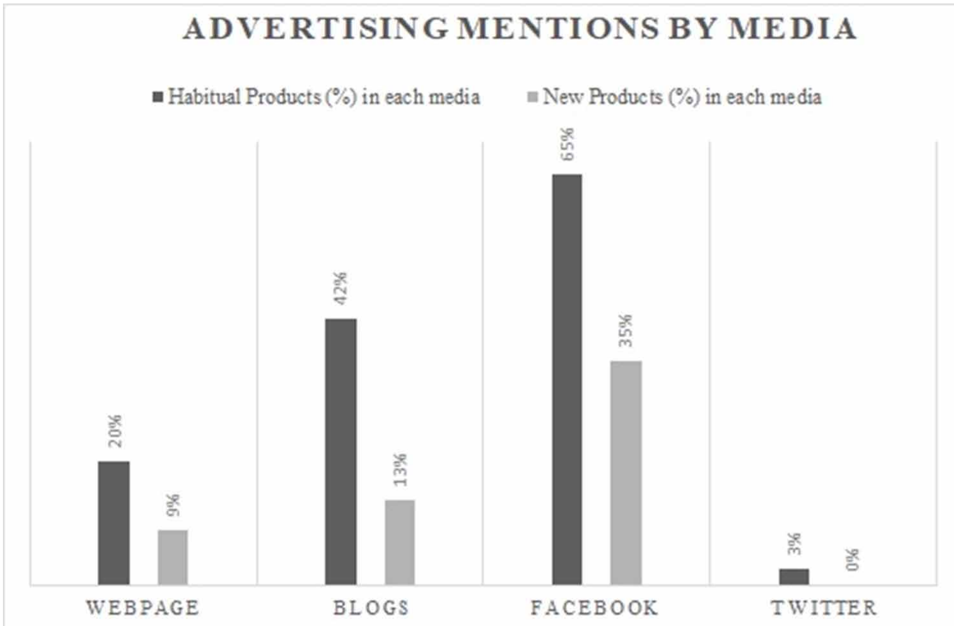


Figure 13. Types of advertising mentions by media (%)



and recommendations aimed at the prevention of infections, SMEs opted to use slogans created by the company (figure 16). During the manual categorization process it was discovered that some of these slogans were not found in text form, being instead inside images -for example; “Todo vai saber mellor”–.

Nearly half of these slogans (43%) appeared in more than one medium in the digital corporate space. In contrast, it should be highlighted that a third of the commonly used slogans covered in this study were mentioned by more than one company during the state of alarm (figure 17).

It must be pointed out here that companies were identified that created slogans without carrying out actions in a 11% in contrast with some actions without slogan in a 28%. In other cases, there is an action in the form of a donation or collaboration, and on occasions even failing to name the company itself in the message, although it is found on the corporate blog or the official social profile. An example of this is Power Electronics and Temel SA for the creation of a new product for Power Electronics: respirators. Only a 11% of SMEs have neither actions nor slogans.

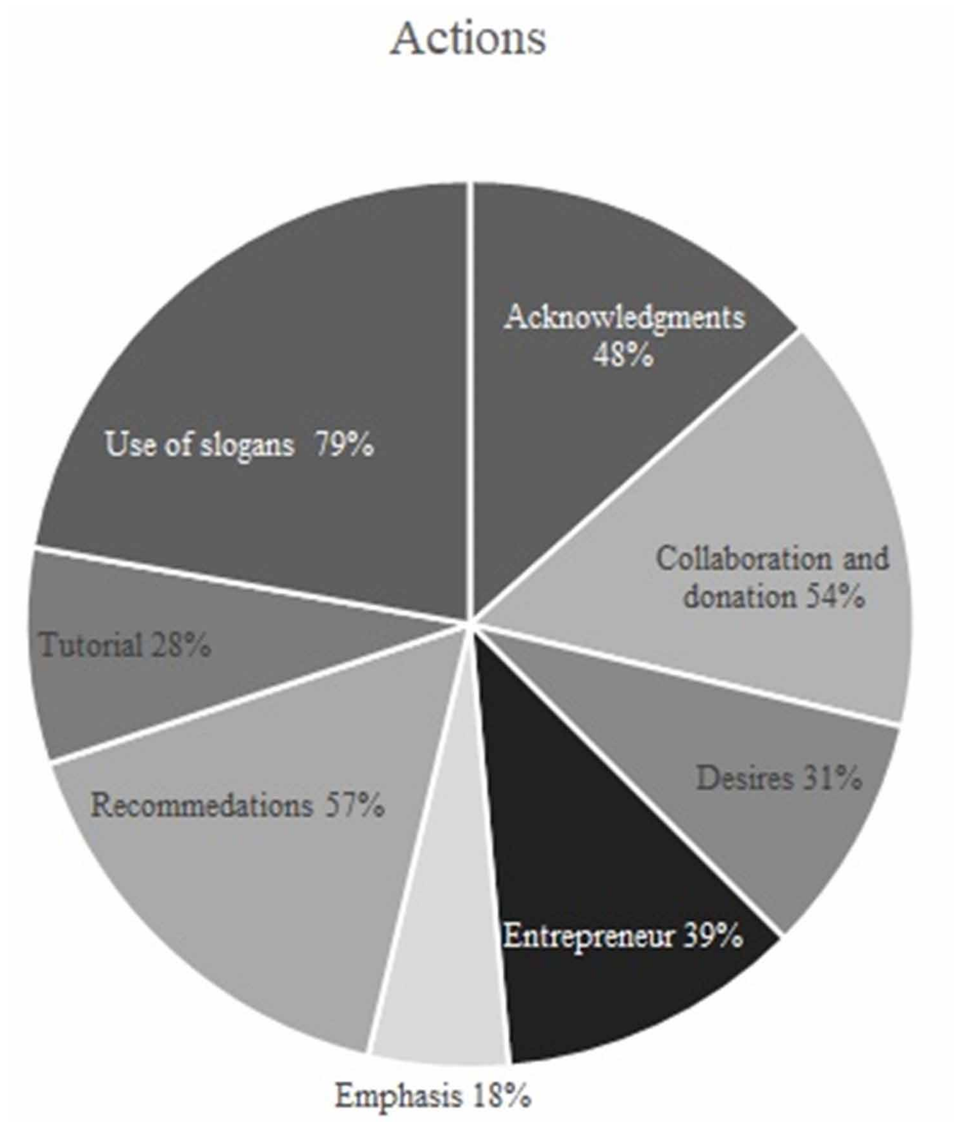
It was identified that the target audience for 83% of these messages containing inbound marketing strategies was the customer. The remaining 17%, meanwhile, was shared between messages aimed at public agents (5%), collaborators (6%) and company employees (6%).

In contrast, actions such as acknowledgements were aimed above all at public employees –health personnel, firefighters, police...– (53%), company employees (20%), customers (17%) and collaborators distributors, delivery workers, food producers– (10%).

Expanding this analysis to the sector level, 100% of companies denominated “consumer services” published messages aimed at the four target audiences categorized in this study. On the other hand, in sectors such as education, 100% of SMEs aimed at a single target (figure 18).

The sectors that publish content aimed at professionals most exposed to COVID-19, customers, company employees and collaborators are the following: Consumer Services, Energy, Food & Drink,

Figure 14. Types of business actions (%)

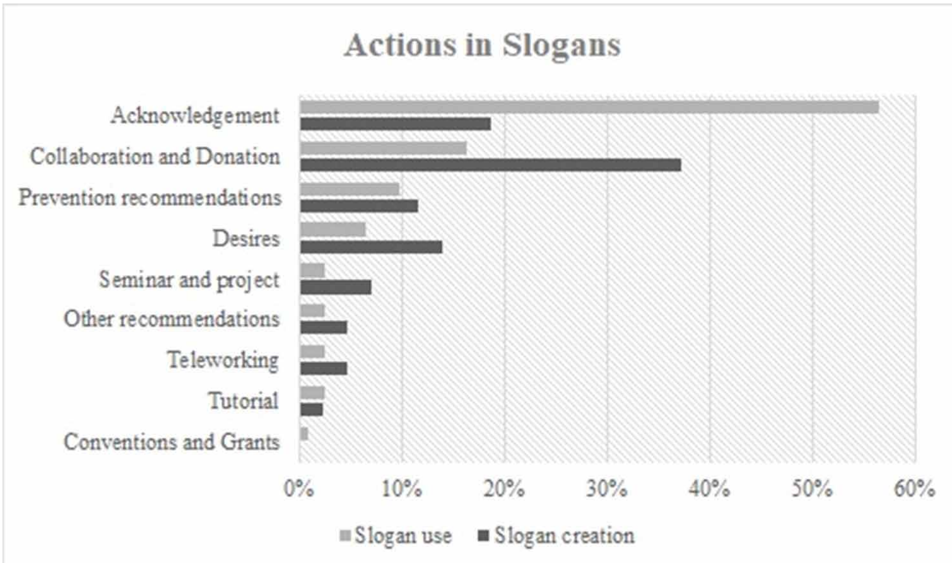


IT Technology and Wholesale. The fact that it is company employees who received the most messages in a total of 15 different sectors, is notable. In contrast, together with the 5 already mentioned sectors, only the Telecommunications and Professional Services sectors publish some type of communication aimed at collaborators.

The content analysis reveals that the marketing strategy that most mentions terms related to COVID-19 or masks is branding – including publicity of mask donations to social groups– and to a letter extent in advertising or inbound marketing. These contents normally contained words that emphasize the moment and context in which the messages in question were published.

Finally, there was a qualitative analysis of the sentiment or mood transmitted by each message found under a type of marketing strategy category. The general tone is that there is a tendency to speak with

Figure 15. Communication of company actions accompanied by slogans (% by slogan type)



greater optimism in general and in contents seeking to increase branding and especially (figure 19). It is certain however that the messages that set out some kind of help for the customer include language of concern that attempted to empathize with the sentiment of each customer.

This summary study of sentiments in the messages has permitted it to be shown that there is no percentage of excessive positive rhetoric that could provoke a paradox of the positive (Waymer & Heath, 2020) that could be extremely counter-productive for the marketing objectives of the company. Conversely, certain inbound marketing content referring to recommendations and tutorials for improving health and mood were widely used in the food & drink sector.

Figure 16. Slogans created by companies (Representation according to frequency of appearance)

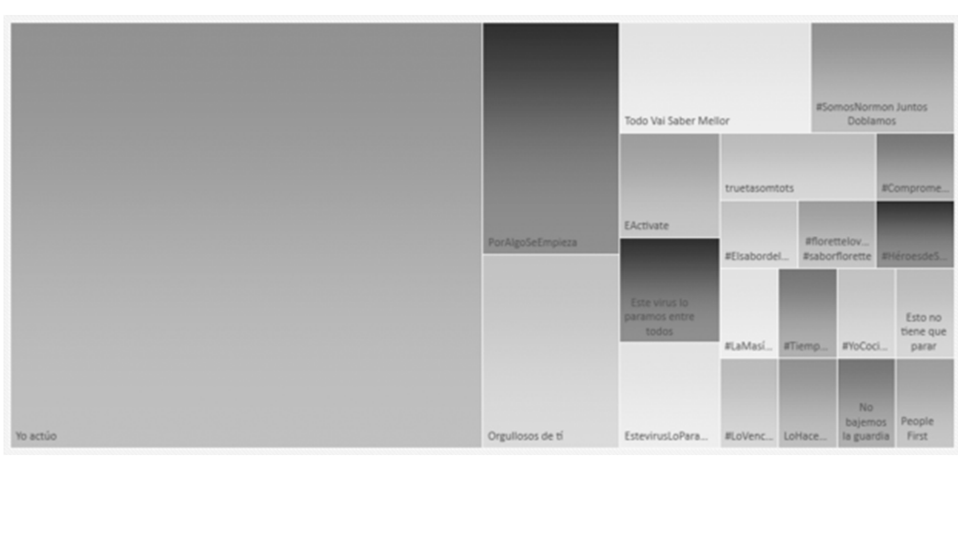
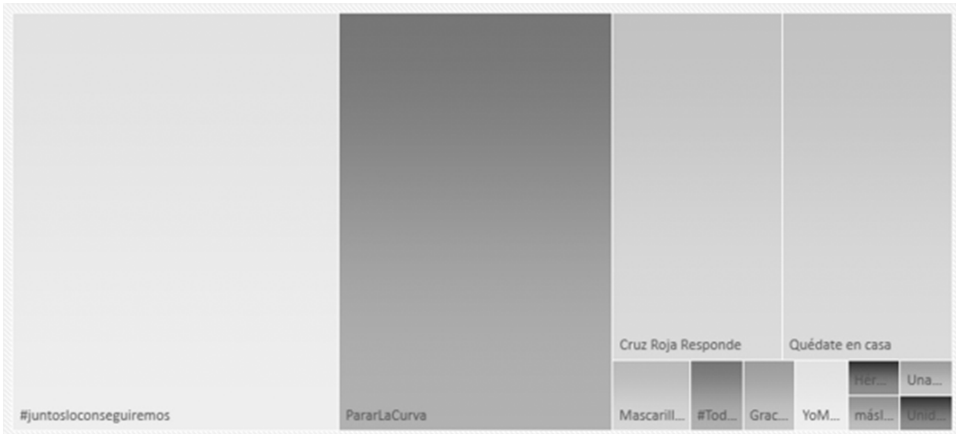


Figure 17. Popular slogans used by different SMEs (analysis unit frequency)



SOLUTIONS AND RECOMMENDATIONS

The Covid-19 pandemic has marked a before and after in e-commerce. Telematic and online sales services have been established with great force and are here to stay. An innovating SME needs good digital marketing strategies to maintain contact with its customers, to know what they want and even predict their needs. Inbound marketing contents should combine a good balance of sentiments, knowledge and strategy to avoid counter-productive effects such as the paradox of the positive, or contrived messages.

Figure 18. Sectors (% SMEs represented) with messages aimed at four types of target

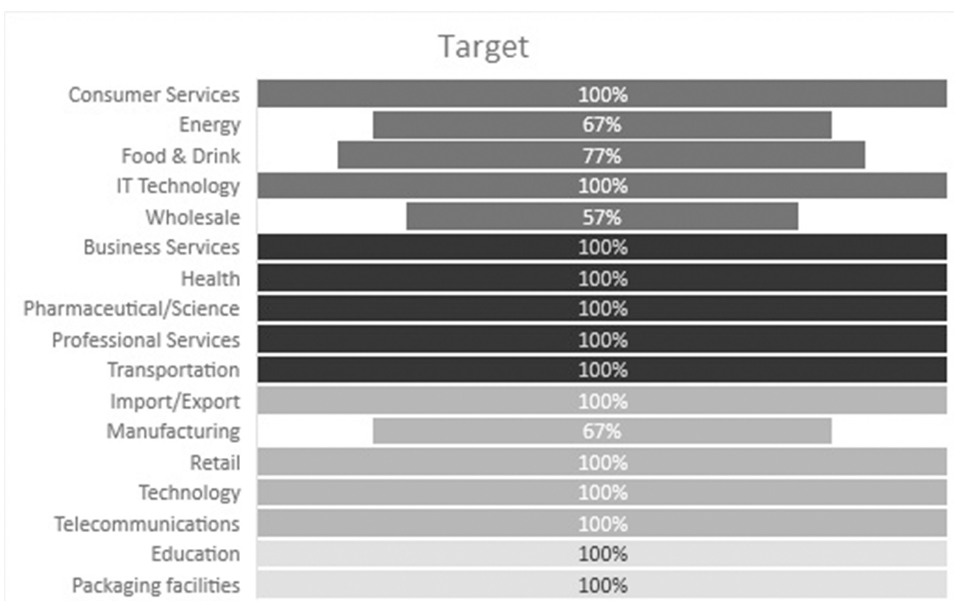


Figure 19. Sentiment of messages by type of marketing strategy

FUTURE RESEARCH DIRECTIONS

Digital marketing has a wide field of development and, following an initial stage of measurement and analysis of the data from consumers, it is opened up to the qualitative analysis to better know their sentiments and tastes via more natural user communications and experiences.

There are a multitude of lines to research after an event as intense as the one that took place this year. It would be of great interest in the near future to study the effectiveness of the digital marketing strategies implemented during the state of alarm via the reactions and comments of customers.

CONCLUSION

The social shock provoked by the lockdown imposed due to the Covid-19 pandemic, and the subsequent measures to reduce infection rates, has modified social habits throughout the world. It was initially the food and health sectors that remained active, along with jobs indirectly connected to them such as those in transportation and packaging.

At a time when priorities at the level of healthcare change, so do social priorities. If a drop in consumption is to be avoided, marketing strategies must also change so that companies retain contact with their customers. This study has identified a number of marketing strategies implemented by Spanish companies or SMEs in COVID-19 times.

There has been a study of the adoption of inbound marketing that allows companies to attract or gain the loyalty of customers -engagement– regarding one or more of their products or services via content of interest they publish.

Our investigation has analyzed the contents disseminated via the digital environment of the SME to identify the different marketing strategies adopted in this health crisis period. Each company has decided at each moment which pieces of information were those that, on the one hand, could be most interesting to their customers and, on the other, to the company for improving image and sales.

Human nature looks for certainties and routines for a greater sensation of security. Communications in the first 24 or 48 hours from the beginning of the state of alarm shows the quick capacity to react of some businesses in this period of great uncertainty. This strengthens the image of security and quality of the company or the brand it represents.

The results obtained show the Spanish online situation regarding interaction, engagement and communication strategies of SMEs. This work shows the attitude of the most enterprising Spanish SMEs during the pandemic, identifying whether or not they attempted to make future predictions or act according to customer expectations. A large number of companies published messages of hope or wishing good health which, are those that users presumably wished to read in the first stage of the state of alarm. Publicity on the measures of hygiene employed by the company combine, on the one hand, a positive image strategy regarding safety and, on the other, the transmission of trust to increase or maintain consumption on the part of users.

The search for new habits in times of lockdown opened up the opportunity to companies of offering/proposing routines or facilitating customers with new knowledge and entertainment via tutorials, videos and so on.

Social isolation or disconnection/separation has provided another possibility for engagement with positive messages and an effort of company and proximity of the business, its products, and services. Through the analysis of sentiments, in this work the degree of mood – optimistic, pessimistic, or neutral – of the messages emitted by the companies has been analyzed and to detect if these are based on an excess of positive spirit. These results pose a future line of research to delve into the paradox of the positive. And in order to know to what extent this engagement has been implemented it is paramount for each company to measure and analyze the actions of visitors to its website and social media channels. It would even be recommendable to become aware of user reactions to quality content and other communications within a marketing strategy.

A resilience was identified in those SMEs that created specific help services to groups of vulnerable customers with specific needs, such as was the case with the elderly. They also adapted the existing terms of service to encourage consumption. And with the passing of time, they also started advertising new services and products specifically focused, according to the advertising strategy, on health improvement.

Many more companies opt for a selection of digital communications media, with a clear preference towards blogs, located on their own websites. The advantages of this are the ease with which the rest of the corporate website in its different sections of products and services can be accessed and, furthermore, the analysis and monitoring of the website may be much more active than that of the social networks.

The heterogeneity of underlying behaviors within each sector has been revealed. Perhaps the only homogenous trend is transversal or intra-sectoral, but even so there might be exceptions, maybe in the food sector as it includes more SMEs, but the behavior may also be the same as for the other sectors.

At methodological level, we can say that to avoid loss of information during the analysis of slogans and hashtags, it would have to be done in all formats as some are audiovisual and not text based.

We detected the limitation that the level of implication within some actions cannot be perceived, such as for example the "Donation and collaboration" category. The quantitative valuation gives the same value to each analysis unit under the "donation and collaboration" unit. However, there is a considerable difference messages referring to actions such as direct donations on the part of the SME, to messages or communications on the presence of the company in an event, or participation in external proposals with the contribution of advertising. This point could be a future subject for research.

Based on the results of this study, it is concluded that in content marketing, the messages aimed at consumers are normally of a personal nature, using direct and familiar language –use of the informal “tú” rather than “usted”, and expressions such as “we care about you” or “we’re working for you”–. These usually include messages wishing good health, encouragement and they can even express concern for the recipient consumer.

The redaction and rhetoric of the message is very eloquent. On occasions there was a contradiction with the categories objectively allocated in this study. For instance, there are companies that advertised external initiatives under a slogan they created, including in the action via a verb in the first-person plural form. In other occasions, the company advertised an external project and invited consumers to participate in it. Content was identified with plays on words semantically related to social responsibility, but without there being any type of real action. It could also involve a transformation of sales incentives with contemporary elements – for example, “*to help prevent the spread of COVID-19, we’ll give you free towelettes with each purchase over 199 euros*”

Another type of strategy whose effectiveness is unknown to us is communicative inaction. Mention has already been made of those companies that said nothing about the social situation of the pandemic. In one case the only mention was not aimed at customers, rather it was anecdotal within a document sent to a shareholder board. There were companies, mainly in the tourism sector, that sent their initial messages of publicity during the first stages of the easing of lockdown with no mention thereof.

In addition, some companies used their communications to combat content originating from other sources to maintain a good reputation. E.g., “Reaction to other communications via social networks: In the face of contradictory communications, hoaxes sent via WhatsApp messages and press articles with biased information not contrasted with official company sources, Supermercados El Jamón hereby wishes to make the following clarifications public in this regard:”

Whereas others are, precisely, extremely rigorous in the information in their contents. They indicate the source or include the bibliography from where the information is taken (e.g., Laboratorios Normon, which quotes the WHO, www.who.int and www.mscbs.gob.es), with information prior to the state of alarm (28 January 2020).

Rapid reactions by businesses reach all spheres of the company. As an anecdotal example, it was discovered that within the first 72 hours of the decreed state of alarm, one of the corporate communications was a job offer for a specialist in health and safety at work.

Content marketing has been the great protagonist during these times of crisis to maintain communication and engagement with customers and, after discovering their opinions and needs, to set out web marketing strategies that facilitate a swift reactivation of commercial relationships with SMEs.

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Chapter 7
A Nudge Psychology Perspective on Digital Marketing and Communication:
Learning From the Nigerian Scam

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ABSTRACT

The Nigerian scam is widely regarded as a joke among digital natives. However, forms and variations of the Nigerian scam have been successful since the 16th century and continue to be so, even in the 21st century. The longevity of the scam hints at the exploitation of very basic human processes. Therefore, this chapter tries to analyze these processes from a psychological standpoint trying to derive principles for effective online communication. The different phases of the scam—from the creation of the target group until the final contact—are analyzed from psychology of persuasion as well as behavior economics standpoints—subsumed under the label of "nudging"—trying to identify the settings, scenarios, framings, and signals which make the scam one of the most successful scams in history. In the final section, it will be attempted to transfer the insights from the Nigerian scam to legit online marketing and corporate communication.

INTRODUCTION

Nigerian princes, high-ranking government officials, and devoted clergy-men approach millions of people every day. Their tragedy-laden stories always result in the same promise: transfer money to them and they will later generously reward the good-hearted helper. Even though the Nigerian Scam has been degraded to an online joke, it has been and still is highly profitable for those who initiate the scam as the fraud generates roughly $3 billion in damages annually (Park et al. 2014: 1). The success of these fraudulent mails can, at least in part, be explained by the employed communication strategies, the (self-)selection of the target group, and the modification/reframing of decision scenarios. All of these are aspects crucial

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for the success of the Nigerian Scam. However, the same strategies and mechanisms are also relevant for other forms of online/digital communication. Further, scammers as well as corporations/digital marketers aim at the same goal: increasing revenue. While corporations and digital marketers – in contrast to the group analyzed in this chapter – seek legitimate ways and procedures to make money, the psychological processes in the different phases of the communication scenarios are comparable in nature. Therefore, the study of scammers, who have no product to offer to their potential victims, seems to be highly valuable as they have to exploit these psychological processes – relevant to both settings – to the fullest.

In this chapter, the communication between scammers and victims will be conceptualized by highlighting four stages which can be found in most scams (Konnikova 2016): (1) the pre-conversation phase (referred to as the *bait* phase), (2) the *hook* phase in which the scammers try to convince the victim to transfer money, (3) the *line* phase in which it is attempted to continue the extractive practice, and (4) the *sinker* phase. In each of these paragraphs, the underlying psychological processes will be highlighted, contextualized, and explained from a behavioral economics/psychology perspective. Ultimately, the chapter tries to connect the evolutionary grown Nigerian Scam with insights from behavioral economics as well as persuasive psychology. This will be achieved by identifying the similarities in the different objects; the so-called *tertium comparationis* (Rossello 1959; Hilker 1962), a research methodology often used to compare and contextualize diverging academic objects. In the final section of this chapter the most powerful items – read as: the *tertium comparationis* of the evolutionary grown Nigerian Scam as well as discovered, tested, and explained by research – will be generalized and transferred to the field of email marketing and digital corporate communication.

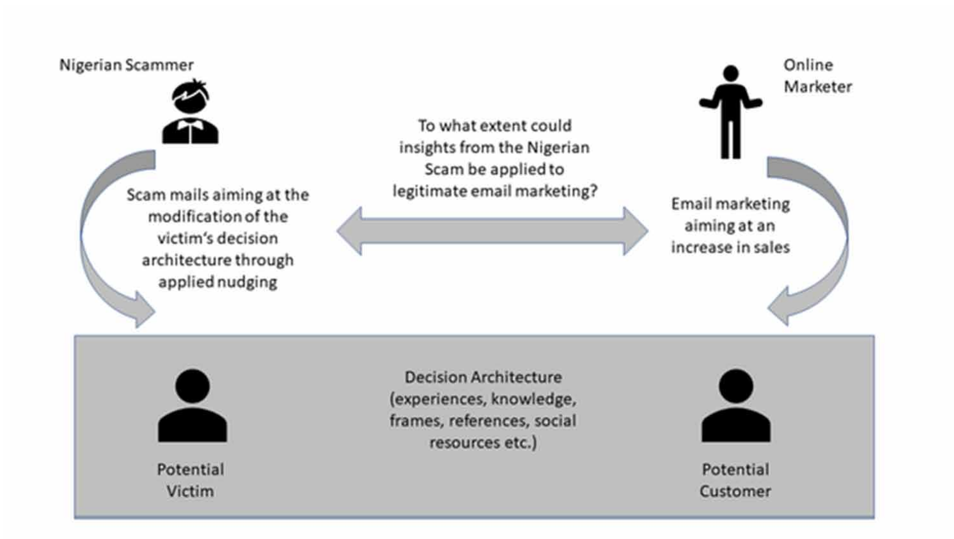
BACKGROUND

The referential framework employed in this paper to conceptualize human decision-making is based on the concept of "Nudging" (Thaler & Sunstein 2017). Nudge theory assumes that human beings consult different modes of decision-making in cases of uncertainty. These modes were conceptualized as system 1 and system 2 by Daniel Kahneman (2012). Instead of system 1 and 2, Thaler & Sunstein (2017, 34) coined the terms *Humans* (for system 1) and *Econs* (for system 2) as they associate the traits of system 1 with rather irrational and thereby human behavior while system 2 represents a more analytical, rational-choice-like approach. Thaler and Sunstein associate the rational way of thinking with the discipline of economics. However, Kahneman as well as Thaler and Sunstein describe the same differentiation. System 1/*Humans* is intuitive, uncontrolled, decides fast, is highly associative, and uses props and cues it has learned. On the contrary, system 2/*Econs* is rule-governed, highly reflective, slow, conscious, and controlled (Thaler & Sunstein 2017, 34). This systemization of decision-making is the psychological explanation for and differentiation between the *blink vs. think* dichotomy (Gladwell 2005).

Nudging further assumes that predictable and modifiable patterns in human decision-making exist, especially in cases in which the decisions deviate from rationality and/or the best interest of the decision-maker. Deviations of actual behavior from the rational choice paradigm cannot be predicted by von Neumann's and Morgenstern's (1944) rational-choice theory as "deviations of actual behavior from normative models are too widespread to be ignored, too systematic to be dismissed as random error, and too fundamental to be accommodated by relaxing the normative system" (Tversky & Kahneman 1986, 3). This led Tversky and Kahneman to the conclusion that rational choice theory "is grossly inadequate as a descriptive model of individual choice behavior "(Tversky 1975, 163). The first systematization of irrationalities in decision-making processes under uncertainty has been presented by Amos Tversky and Daniel Kahneman as they focused on the cognitive-perceptual aspects of this phenomenon – a line of thinking they coined *Prospect Theory* and which can be understood as a descriptive psychological model of decision making as well as judgement under uncertainty (Tversky & Kahneman 1974). Prospect Theory is the umbrella term for a plethora of effects and biases in which the presentation and/or availability of information changes the decision outcome. One such example is a study in the field of medicine in which participants of diverging levels of expertise (expert/physician, amateur/patient) have been confronted with a treatment option. In the first case the treatment was presented with a 10% mortality rate, in the other experiment with a 90% chance of survival. While both presentations numerically describe the same treatment, the expert as well as the amateur test subjects "were influenced by several variations in the nature of the data and the form in which they were presented" (McNeil et al. 1982, 1262). This can be considered a clear violation of rational-choice principles which should later find its way into the literature as the *framing effect* (Tversky & Kahneman 1979: 3/4; Tversky & Kahneman 1981). Generally speaking, Prospect Theory identifies cases, scenarios, and modes of presentation which allow a predictable modification of decision outcomes (Kahneman & Tversky 1977). Nudge theory widens this approach as not just cognitive-perceptual aspects of the environment are considered but all aspects with the help of which a decision is made. The sum of these aspects is often referred to as the "decision architecture" (Thaler & Sunstein 2017). Decision architectures involve all relevant aspects, such as provided information, contextualization/framing of information, reference groups, social aspects, wording, and a plethora more; nudging thereby enriches the insights from decision-making psychology and behavioral economics with knowledge from social psychology, socio-linguistics, and sociology (Neuhaus 2020a, 74). The conscious modification of decision architectures has proven to be a potent tool as it has the potential to change decisions, outcomes, and behavior. In the following, an emerging amount of institutions, corporations, and governments employed nudging to improve settings in their interest (Straßheim et al 2015).

The power of nudging lies in the creation and modification of decision architectures by providing the *right* information and present it accordingly. This leads the decision-maker to a fast, intuitive, and unconscious system 1 decision while the problem the decision-maker is actually tackling would rather require the analytical, slow, and reflective system 2. This mismatch of the presented problem and the responding system can be used to nudge people into a certain direction (Neuhaus 2020b, 13/14). As this chapter will argue, these mechanisms, heuristics, and shortcuts can also be targeted in a plethora of online communication scenarios. In fact, exploitation of these mechanisms in online settings is particular potent as the owner of a website, the host of a blog, or the writer of an email fully controls the decision architecture as s/he solely decides which information is provided and in which fashion. Control over decision architectures has proven to be a potent tool as the majority of people does not act based on objective reality but what they assume reality to be (Haltermann 2012, 64). Nudging modifies this perceived and assumed reality. Daniel Kahneman coined this availability bias the *What You See Is All There Is* (WYSIATI) rule (Kahneman 2012, 115). As this paper will show, the Nigerian Scammers have perfected the modification of decision architectures by applying a plethora of nudges to alter their victim's perceived reality in their favor. This is a, up to this point, neglected perspective on spam emails as one sub-category of online communication. This chapter will analyze the different steps of the scam, highlighting, contextualizing, and explaining the applied nudges as well as outline nudging's potential for legitimate online communication.

Figure 1. Communication between scammer/victim and marketer/customer



THE NIGERIAN SCAM FROM A NUDGE PERSPECTIVE

The Bait Phase

Spam emails are, compared to other media and modes of communication, relatively cheap while being quick, direct, reliable, well-scalable, and globally accessible (Saini 2012, 1). Therefore, they are sent to either stolen, collected, or otherwise made available email accounts. Scammers do not discriminate based on any observable trait. It could be assumed that scammers aim at a high response rate as this may enhance their chances to get a reply, start a conversation, and ultimately victimize responders. However, the way scam mails are written directly contrasts this assumption. Scammers emphasize their Nigerian nationality – whether this is actually the case or not cannot be confirmed – and also construct highly dubious scenarios. Academic research on online fraud agrees that this is a red flag for every well-informed internet user (Schaffer 2012, 162). The disparity between the scammer's approach (the mails) and their obvious aim (victimize people for monetary benefit) can be explained by delving deeper into the scam's economics. Initiating contact by sending spam mail is comparatively cheap. Costs for the scammers are caused by on-going and continual conversations with potential victim(s) as writing personal message requires time as well as human capital. Therefore, it is in the scammers' interest that if they invest time, money, and effort, the endeavor results – to a significant percentage – in the victimization of their contact and pays off monetarily. The worst-case scenario for scammers would be the investment of time, manpower, and money by having a long-lasting conversation which results in no payment (Herley 2012, 11). The scammers rightfully assume that naïve internet users make better targets as this sub-population is less likely to research the presented narratives online, seek advice on the internet (i.e. in forums), or discuss such matters with informed people offline (Herley 2012, 11/12). Based on these observations, it could be concluded that the core traits of a potential victim are social isolation, advanced age, limited online experiences/expertise, and – above all – naivety. All of these items are unobservable based on the scammers' available data, ergo the email addresses (Levitt & Dubner 2016, 160). This poses the question how the scammers can make a usually unobservable trait visible. The solution the scammers came up with is a mechanism called self-selection (sometimes also referred to as the self-selection bias), which could be described as a selection by proxy. In legitimate businesses, often times pricing is used to trigger self-selection (Harford 2007, 52/53). The Nigerian Scam on the contrary uses the absurdness of the initial story to select for the desired, yet unobservable, traits. Thereby, the scam exploits a core insight from game theory which assumes that distinct actors behave differently when being exposed to different signals and/or rules (Binmore 2013, 155/156).

By making their narratives highly dubious and using fraud-connoted buzz words, the scammers target a specific sub-population. Responders to these outrageous narratives have proven to have a tendency for naivety – the key trait of a potential victim. By responding to the initial mail, the – prior to the self-selection process – uncategorizable crowd of people has organized itself along the lines of potential victims and non-responders. Simultaneously, this selection process makes the scam financially more profitable as the non-responders – which could have been lured into a conversation with a less fraud-laden mail – would have had a higher probability of opting-out at a later stage of the scam. This would pose the worst-case scenario for the scammers as it produces the highest cost while generating zero revenue. By including certain connoted buzz words, the scammers reduce the amount of responses dramatically as only 1 out of every 12.5 million mails is responded to (Wainwright 2017, 150; Kanich et al. 2008, 11). By letting the tremendous amount of approached people categorize themselves among the line of desirable traits, the initiators of the scam increase the scam's likeliness for monetary reward while minimizing the probability of a high costs, low revenue scenarios. By intelligently using the right wording and narratives, the scammers do not only reduce their target group, they optimize their target group. This *target group optimization* has a long history with the Nigerian Scam. In the 1980s, online communication was far away from being a mainstream phenomenon and scams of this kind took place by letter mail. This changed the setting dramatically as initial costs were much higher compared to the digital version of the scam. As the scammers could not address all people indiscriminately and hope for self-selection processes, scammers showed a prevalence for addressing people with partly visible traits. In the times of letter-based communication, scammers primarily targeted people registered with drug abuse or addiction-related organizations. Furthermore, they addressed people registered with charities, churches, or registered debtors and/or alcoholics (Kich 2005, 129). The reason for this kind of pre-selection can be explained by the hidden, yet often related, traits of the aforementioned groups. Alcoholics, debtors, and/or addicted people constitute a sub-population which is, compared to the rest of society, more likely to be short on money. As the scam promises financial rewards for providing advanced-fees, people with a lack of monetary resources are expected to respond more positively to a *make money fast* scheme (Stajano & Wilson 2011, 73). The selection among the lines of charity and/or religious populations can be explained by the assumed trait of empathy. People being engaged in charitable organizations are assumed to be more empathetic and therefore respond more positively to people in need. Neediness constitutes the second key narrative of the scam. These considerations from the past as well as present observations illustrate that the channel of distribution (and the attached costs) correlates with the amount of people being addressed. While cheap distribution allows more people to be addressed and requires a different mode of (self-)selection, higher costs require a more careful selection of the target group.

The Hook Phase

The second phase of the scam, the hook phase, prepares the potential victim psychologically and mentally for the transfer of monetary resources. This is primarily achieved by a modification of the relationship between the victim and the scammer. Therefore, the scammers send out signals (Spence 1973, 356) which should lead victims to assume their trustworthiness. One key tendency which helps scammers in this phase – even though it expands through all phases of the scam and contributes significantly to its success – is the *truth default* (Levine 2014). The truth default can be described as the human tendency to generally assume that other people tell the truth, at least as long as the narrative follows certain conventions. While the truth default significantly contributes to the scam's success, the focus of this section will be set on the exploitation of irrationalities in the form of nudging. It can be assumed that it is the scammer's main concern to appear trustworthy. Needless to say, that trustworthiness is a trait which cannot be properly evaluated through email communication alone. The different signals/nudges discussed in this section can either be found in the initial spam mail or in later messages as multiple variations of the scam exist. These variations are partly caused by the informational props the scammers use (i.e. references to current events) but also due to different realizations competing in the *market*. A scam can be conceptualized evolutionary as scammers try out different versions of fraud, wording, narratives etc. and continue the most successful ones while retiring the less functional versions of the scam. This would explain why descriptive psychological research identified the approaches, settings, and scenarios in which predictable irrationalities occur while these scientific insights match with the observable praxis of scammers: both analyzed, yet with alternating intentions, the behavior of actual human beings and thereby followed a descriptive instead of normative approach towards decision-making. The nudges discussed in this section (authority, scarcity, reciprocity, and likeability) are well-recorded by research and realized through the employment of certain cues, props, and narratives. Some of these cues, props, and narratives will be presented exemplarily. It can be assumed that these narratives and cues are, evolutionary speaking, relatively stable and target the more basic structures of human decision-making.

The first nudge almost all scammers employ is the *authority* nudge. The majority of recorded scam mail, which could be classified as advance fee fraud, features characters of authority (Chawki 2009, 4). These can be high ranking military staff, government officials, royalty, or clerical authorities (Edelson 2003, 393/394). The authority nudge exploits a mental shortcut deeply rooted in human psychology. Human beings organized themselves in dominance hierarchies ever since. In modern times, these dominance hierarchies multiplied as the occupational fields diversified as well. The functionality of social entities (i.e. families, companies, states etc.) depends on these dominance hierarchies as – at least in functional hierarchies – skill, effort, and competence determine one's position in the hierarchy (Peterson 2018). This allocation mechanism promises that jobs and tasks are assigned based on competence. This in turn should increase the probability that tasks and problems are handled by competent people who can solve them and thereby increase overall well-being. However, as human social structures increased in size and grew more complex, competence and skill could no longer be evaluated on a case-to-case basis. One way to, at least in part, guarantee the allocation of duties based on merit was the certification of skills through diplomas, certificates, and job titles. Following this line of reasoning, it can be argued that – as long as the dominance hierarchy is functional – job titles, diplomas, and certificates are signals of competence and as such they are barely ever questioned (Cialdini 1987, 176). Especially in times of and/or judgment under uncertainty, human beings show the tendency to turn to authorities. Also, almost all individuals have learned from experience that following the instructions of an authority (i.e. a doctor or a teacher) leads to more satisfying results (Cialdini 1987, 175). Especially in judgements outside one's own domain of competence, the mental shortcut which equals authority with competence has proven to be particular potent. One such example is the (in)famous Milgram experiment in which a medical/scientific authority figure urged participants to administer electric shocks to another person. A significant amount of people followed these instructions to the very end (Milgram 1965). The Milgram experiment underlines human's willingness to outsource decision-making to authority figures as a proxy for competence. The same shortcut is targeted in the discussed spam emails as scammers assume that potential victims are more willing to follow instructions from an authority figure. The success of the scam partly depends on the credibility and authenticity with which the scammer can pretend to be an authority figure. This statement can be supported by observations from historical fraud research. Variations of the Nigerian Scam can be traced back to the 16th century (Smith 2009, 28). Back then the scam was known as *The Spanish Prisoner*. The Spanish Prisoner was also an advance fee fraud in which an alleged Spanish royal needed money to bail himself out of jail. In return for the generous gesture, the royal would make the good-hearted helper a rich man. In the 16th century, few people ever received mail and even fewer received letters written on expensive, high-quality paper (ibid.). The selection of the materials and the mode of communication were chosen on purpose to increase the credibility of the claims being stated in the letters. While multiple aspects of the scam have evolved over time, some remained stable. One of the most resilient traits of the scam is the usage of authority figures – a powerful nudge with a recorded history of more than 400 years.

While the usage of an alleged authority figure helps to perpetuate the authority aspects of the nudge, it also contributes to a second nudge, the *scarcity* nudge. Scarcity feeds two very basic human's needs and behaviors: the desire to be special (Cialdini 2003, 22) and regret aversion. The desire to be special is exploited by the scam as – at least for the naïve victim – it looks like as if s/he was chosen to help the authority figure in question. In the illusion created by the scam, the general dynamic of competence hierarchies is reversed as the, based on position, lower-level person is in charge to save the authority figure. The feeling of being needed by someone who is higher in social standing creates the feeling of privilege. Further, dominance hierarchies have the tendency that only a chosen few ascend to the top. As the scammers signal belonging to that precious and tiny group, scarcity is created and ultimately exploited. The power of the scarcity nudge can also be explained by evolutionarily learned processes. In human history but also in almost every person's experience, scarcity signaled desirability (Modic & Lea 2013, 5). May it be precious metals, prestigious institutions, or unique opportunities, scarcity has long been associated with desirability and thereby value. The well-known laws of supply and demand are the mathematical manifestation of this – often, yet not always true – correlation. However, the scarcity nudge not only creates the illusion of being chosen for a rare and thereby (falsely assumed to be) precious opportunity but also triggers a mechanism called regret aversion. Analysis of spam mail has shown that many of these messages operated with words signaling urgency (Bergiel et al. 2008, 137) which multiplies the potency of the scarcity nudge. The creation of urgency has two aims. Firstly, it actively pushes the decision into the field of system 1/*Humans* – even though system 2/*Econs* should be the victim's system of choice – as system 1 is responsible for fast and in this case supposedly urgent decisions. Secondly, the creation of urgency reminds the victim that this opportunity only exists temporarily and influences the victim's decision-making by activating his/her regret aversion. Regret aversion (Loomes & Sudgen 1983) describes the procedure in which humans imagine their future selves under certain conditions, i.e. realizing a scenario or spurning an opportunity. This procedure is a simplification mechanism to facilitate judgement under uncertainty. The incredibly complex system 2 question (Should I engage in this endeavor?) is replaced by the much simpler system 1 question (How would I feel if I missed out on this opportunity?). The imagined state of missing out on the opportunity results in a strong feeling of regret. The comparison of the anticipated future emotional states replaces the fact-driven analysis of the scenarios and results in higher degrees of participation. While this substitution of questions is against the laws of analytical decision-making, the scarcity nudge – as one way to facilitate the processes described above – has proven to be a powerful nudge which can alter behavior significantly.

Another relatively frequently occurring wording in these spam emails is the emphasis that the sender looks for a trustworthy individual to help him/her. Some scammers even go a step further and attach copies of confidential documents (i.e. ID cards, driver's licenses, or passports) to the initial or one of the later mails – the attempt to increase the signal's credibility (Zahavi 1997, 228/229). While the documents are likely to be manipulated, stolen, or forged, both – the overemphasis on trust as well as the attached documents – try to exploit the same weakness: human's tendency for *reciprocity*. Reciprocity is a mechanism of mental bookkeeping which should tell the involved actors whether they are rather indebted or rather the debt holder in the social exchange (Cialdini 2003, 20; Cialdini 1999). This form of mental bookkeeping is not limited to monetary or material units but is also consulted for the conceptualization of human relations. Historically speaking, reciprocity is the in-built mechanism which urges humans to keep symmetrical relations with their environment and thereby enable long-term cooperation (Cox 2004, 262). As all human beings – yet in varying degrees – have the general desire to be in balance with their social environment, reciprocity makes human behavior more predictable. Reciprocity may be the key factor facilitating long-term cooperation and thereby having been a crucial building block for human development and progress as, from a game theoretical/economic perspective, cooperation is a must for utility maximization (Hammerstein 2002, 84). Scammers try to exploit this mechanism by creating scenarios of asymmetrical reciprocity. As argued, mental bookkeeping is not an analytical tool which calculates amounts and compares numbers but should rather be considered an indicator whether an individual is indebted or not. Asymmetrical reciprocity attempts to exploit the differences between rational-based and feelings-based indebtedness. By providing immaterial, unsolicited gifts (i.e. trust, compliments, copies of forged documents etc.), scammers try to push the mental balance into the area of indebtedness. The victim's perceived indebtedness creates the urge to even out the balance (Cialdini & Goldstein 2002: 43). Out of this asymmetrical relationship, scammers approach the potential victim and asks for the transfer of monetary resources. After having subconsciously consulted his/her mental bookkeeping, the victim arrives at the conclusion that s/he owes the scammer a favor and – to a higher degree than without the reciprocity nudge – decides to transfer money on a foreign account. Reciprocity is a well-known mechanism which has been exploited by multiple groups and organizations in real life, such as the *Krishna* cult which asked its members to beg for donations. The members of the cult gave potential donors a flower and a blessing before asking for a contribution – the creation and possible exploitation of asymmetrical reciprocity which resulted in higher revenue for the group. As shown, the exploitation of asymmetrical reciprocity has a long and vivid history. However, as the digital world does not allow the instant transfer of material goods, scammers confine themselves to immaterial asymmetry through signaling trust and the transfer of (perceived to be) important documents.

The last nudge applied in the hook phase is the *likability* nudge. An increase in likability makes cooperation between two people (i.e. victims and scammers) more likely (Cialdini & Goldstein 2002, 40). The mental shortcut which is exploited by the likability nudge can best be described by the concept of the *mental shotgun* (Kahneman 2012). The mental shotgun effect is similar to the concept of regret aversion and takes place when a relatively difficult question is replaced by a related but significantly easier one. The question of whether the received email(s) are legit is replaced by the question whether the reader likes the sender or not. Due to limited information, the basis on which the victim/reader has to decide whether to trust the scammer or not is relatively small and solely controlled by the scammers. Especially with regard to the likability nudge, information about the target group is key as scammers attempt to create an in-group feeling and/or in-group mentality (Sagarin & Mitnick 2012, 33). The psychological basis for this approach can be found in the observation that human beings tend to evaluate others based on similarities. Generally speaking, research could show that positive evaluations correlate with similarities. Such in-group mentality can be created by hinting at shared spiritual/religious beliefs, the belonging to a certain group of people (i.e. bereaved people), or shared struggle with a specific problem (i.e. the loss of a relative). Recorded cases of direct attempts to victimize religiously engaged people, 9/11 victims' relatives, or relatives of deceased soldiers (Dyrud 2005, 6) illustrate that scammers are well-aware of the in-group feeling's potency to create social proximity and thereby likability. However, likability cannot just be created by social proximity and likeliness but also by an appeal to the potential victim's self-image. A key insight from marketing argues that human beings do not purchase items based on their current status quo but their projected (and wished for) future self (Landon Jr. 1974). The same can be said about the Nigerian Scam. Most people (want to) think of themselves as helpful, cooperative, and good-hearted. Thereby, a positive self-image can be considered a basic human desire (Hobson 2012, 170). Scammers try to exploit this tendency by presenting themselves as ill-fated, out of luck, and struck by destiny. (In-)Famous realizations of such attempts are severe illnesses of relatives or the scammer him-/herself, unforeseeable accidents, or other strokes of fate (Dyrud 2005, 7). These narratives try to exploit the potential victim's concept of self by providing him/her a chance to live up to these self-conceptualizations.

This section highlighted the four main nudges applied by advance fee scammers in the first stage of the scam. The four principles fraudsters try to exploit in the *hook phase* of the scam are authority, scarcity, reciprocity, and likability. The main purpose of this phase is the transfer of money. As the following section will show, the initial amount is secondary as the follow-up phase, the *line* phase, has mechanisms installed which make continued and steadily increasing payments more likely. As the analysis of typical scam mail and the underlying psychological implications could show, scammers employ the concepts of authority, scarcity, reciprocity, and likability as they are – even if differently pronounced in different individuals – universals of human behavior. These behaviors have a long-standing history as they are a result of basic human cognition, brain physiology, and culture.

The Line Phase

The line phase begins after the victim has transferred money to a foreign bank account. This phase aims at the prolonging and escalation of monetary transfers. From a narratological standpoint, scammers justify this on-going cost escalation with sudden and unforeseeable extra fees as these can easily be integrated into the existing narratives. This phase employs three nudges, namely the consistency nudge, cognitive dissonance, and the modification of risk perception. All three of these effects prolong and exacerbate the scam, often resulting in detrimental damages for the victim.

Research has shown that people generally try to be *consistent* in their thinking, actions, and attitudes (Guadagno & Cialdini 2010, 152/153). The desire to act in accordance with decisions made prior is a relatively stable trait which can be found across cultures (Petrova et al. 2007). It seems to be the case that the initial decision – i.e. to transfer money to scammers or not – requires a relatively huge amount of mental resources. After the decision has been made, similar decisions or repetitions of the initial decision require less mental effort. In the case of similar, related, or repetitive decisions, the decision steadily migrates from the reflective and slow system 2 to the intuitive but faster system 1. Also, it does not seem to be the case that, with regard to repetitive actions, the numerical amount (i.e. of money) seems to be a factor. Once a decision has been made and the mental threshold has been passed, the probability to repeat the action – even with higher amounts – becomes more likely. Therefore, scammers apply the nudges outlined in the prior section trying to convince the victim to transfer a relatively moderate amount. After the initial threshold has been overcome and the decision steadily migrates from systems 2 to system 1, the amounts gradually escalate. The consistency nudge highlights the temporal dimension – the scammer's sensitivity when to ask for which amounts of money – of the scam and aligns it with existing knowledge on decision-making in singular and repetitive decision scenarios.

The effect of *cognitive dissonance* hints at a phenomenon related to the consistency nudge; however, it plays a different role in the scam. Cognitive dissonance (Festinger 1957) describes the difference between people's ideas about the world and the actual world. Festinger argues that humans are not well-equipped in case of major difference or – as Festinger calls them – dissonance between the two. While lower-level deviances between the two can be accommodated, dissonance reduction of central elements works differently. One of Festinger's key insights is that sometimes, if humans are really attached to a thought or concept, they do not change the concept if it collides with reality but rather alter (their perception of) reality (ibid). For the Nigerian Scam this means that victims, after they have convinced themselves that their online contact is a trustworthy person in need, show the tendency to rather alter their reality instead of changing their mental concept about their online contact. Victims come up with explanations to justify their own behavior as well as their contact's actions. In some cases, victims even partially extend the narrative to accommodate new information. By filling narratological gaps of the scam, the victim's cognitive dissonance alongside their attempt of dissonance reduction allow scammers to perpetuate the fraud even longer. Also, this observation explains the potency of the consistency nudge as acting in accordance with decisions made prior and thereby being exposed to less dissonance can be considered an incentive in itself (Rogers 1957, 97; Kolden et al. 2011, 65).

From a rational choice perspective, it could be assumed that the accounting of losses and gains is similar in nature. The utility of a monetary unit gained should be numerically the same as the negative utility of a unit lost (Neuhaus 2020a, 81). However, empirical research has shown that this assumption is incorrect. Losses are accounted at roughly twice the rate as gains, a concept which is known as *loss aversion* (Tversky & Kahneman 1991). It is likely that loss aversion has its roots in evolution as losses threatened the survival of an individual or group much more than gains could guarantee future survival. As the current population is the descendants of the surviving populations of the past – a population which primarily acted loss aversive – this trait is deeply ingrained in almost all human beings (Kahneman 2012, 435). Loss aversion by itself would speak against the success of the Nigerian Scam. However, depending on whether humans situate themselves in the loss or gain spectrum, their sensitivity towards risk-taking changes as well. Kahneman and Tversky (1981, 453) tested this risk aversion by confronting two groups of participants with the same decision, yet differently framed. Participants were confronted with the scenario of a pandemic which infected 600 people and could turn out lethal. In scenario one, participants could choose between (A) the sure survival of 200 people or (B) a 33.3% probability that all 600 survive (and a 66.6% probability that all 600 die). The majority of participants (72%) choose option A. In a second trial Kahneman and Tversky reversed the odds and confronted participants with either option (C) 400 people die or (D) a 33.3% probability that nobody dies and a 66.6% that all 600 decease – 78% choose option (D) over option (C), an almost complete reversal of the prior decision scenario. While this study underlines the potency of the framing effect, it also hints at another trait in human behavior. Generally, humans are rather loss and risk aversive; however, when being confronted with certain losses, the willingness to engage in high risk scenarios increases tremendously (Tversky & Kahneman 1992). This can be considered one explanation for high-stakes and high-risk gambling behavior after initial losses. For the Nigerian Scam this means that after the initial losses have been caused for the victim, the victim's willingness to invest into even riskier endeavors increases. Just as a gambler who risks high stakes to win back his/her initial losses, victims of the Nigerian Scam continue transferring gradually increasing sums hoping to eventually get back the money they initially invested (and possibly more). Alongside the consistency nudge and the cognitive dissonance phenomenon, this change in risk aversiveness – caused by the victim's self-evaluation and situating in the loss – reinforces the longevity of the Nigerian Scam.

The concepts presented in this section – the consistency nudge, cognitive dissonance, and the modification of risk perception – partly overlap and partly cause each other. However, all three hint at the same direction: the continuation and escalation of the scam. The exploitation of repetitive and unreflective behavior leads already victimized people onto an even darker path of future victimization causing tremendous damages for individuals through the payment of multiple installments. With regard to the initial observation of this chapter – the procedure of target group optimization – a similar pattern can be recognized here. The majority of all victims gets away with moderate damages; however, few victims – led by the above outlined effects and mechanisms – respond to the con financially and psychologically more potently and stack up tremendous amounts of damages.

The Sinker Phase

As outlined in the prior section, the victim and the fraudster continue the conversation as well as monetary transfers. They both participate in the same communication/signaling game; however, they play on different playing fields. While the victim tries to remain a good relationship with the fraudster – the victim still assumes that s/he will eventually be rewarded – the fraudster has a more realistic look at the game as s/he can opt out and disappear with the money whenever the situation demands it. As only incorrect, stolen, or forged information and documents have been shared with the victim, there is only little to no chance that reimbursement or prosecution will ever take place. This asymmetrical power balance is contrasted by the illusion the fraudster has consciously and carefully constructed. While the scammer emphasizes that s/he is dependent on the victim's goodwill, the tables have turned after multiple payments have been conducted. Often times, scammers stop responding once unnegotiable problems arise and/or the victim starts to doubt the legitimacy of the presented narratives. The naïve victim starts to research the presented narratives and finds out that s/he has been conned. Due to feelings of shame and embarrassment, many of these frauds go unnoticed and do not appear in official statistics. Thereby, it can be assumed that the actual damage exceeds the official numbers by a substantial amount – a fact which again highlights the potency of the presented nudges and mechanisms. The sinker phase is characterized by the fact that the victim's illusion is disrupted by something (i.e. an information, fact etc.) which causes the victim to eventually abandon their theories about their conversational partners. This often results in the end of the victim's cognitive dissonance and can cause a tremendous shock for the victim.

LEARNING FROM THE NIGERIAN SCAM – IMPLICATIONS FOR THE MODIFICATION OF DIGITAL DECISION ARCHITECTURES

In the online space, customers make countless decisions each and every. These decisions involve purchasing decisions, the decisions which websites to consult, or to engage in certain – often unilaterally initiated – communication processes. As such, these decisions can also be modified by consciously constructing favorable decision architectures. Also, online behavior of potential customers' stretches across multiple modes, platforms, and distribution channels, such as newsletters, websites, social media, blogs, podcasts, videos, or adverts. All of these platforms and distribution channels have specific strength and weaknesses, which stem from the genuine nature of their decision architectures as well as the degree to which these decision architectures can be modified. This section aims at the transfer of insights from the Nigerian Scam to the field of marketing- and business-related online communication. From the broad field of business online communication, this chapter will primarily focus – as the Nigerian Scam also uses emails as its medium of choice – on email marketing. Email marketing can be conceptualized as the act of "organizations send[ing] regular updates to customers about their products and services. Many times, these mails are not entertained by customers and are termed as spam" (Sahai et al. 2018, 53). Due to the fact that email marketing is often times not taken up by customers – sometimes even labeled as spam – effective and nudge-inspired communication becomes even more relevant as it could at least partially dissolve email marketing's contradictions as outlined by Hartemo (2016): "Paradoxically, from the marketer's point of view email marketing is usually economical and effective, and from the consumer's viewpoint often irritating and irrelevant. This contradiction needs a solution ". Furthermore, the fact that the majority of marketing related mails is marked as spam justifies the knowledge transfer from the Nigerian Scam to legitimate business as both camps of actors see themselves confronted with similar problems which Ellis-Chadwick and Doherty (2012, 847) outline as following: "The subject line of an e-mail must grab the initial attention of the customer and prompt him or her to open the e-mail; otherwise, there is no opportunity for sustained attention". One way to evoke a higher degree of (potential) costumer responses from marketing emails could be the employment of persuasive strategies as well as the conscious construction of decision architectures. In order to discuss the potential of nudge-inspired email communication, usage as well as preferable locations of the presented nudges will be discussed and brought into accordance with already existing literature on marketing in general and email advertisement in particular. The phenomena of cognitive dissonance and modified risk perception are neglected in this section as their relevance seems to be limited to malevolent endeavors.

Target Group Optimization: With regard to target group construction, legitimate businesses see themselves confronted with the same problem as the Nigerian Scammers as both try to link a non-observable trait to an email address and/or customer account. While the Nigerian Scammers modify their stories hoping for self-selection to solve their target group problem, legitimate businesses can draw on more elaborate resources. The emerging amount of data – collected on websites, social media platforms, or elsewhere –, can be used to "predict a range of highly sensitive personal attributes including: sexual orientation, ethnicity, religious and political views, personality traits, intelligence, happiness, use of addictive substances, parental separation, age, and gender" (Kosinski et al. 2013, 1). With the help of these, the desired groups can be addressed with meaningful and relevant content. In the case of target group construction, legitimate businesses should make use of these data-informed strategies as self-selection procedures – as employed by scammers – could result in reputational damages.

Likability: The analysis of the Nigerian Scam could show that Scammers employ strategies aiming at the reduction of perceived social distance – the scammer pretends to be, in one or multiple aspects, similar to the potential victim. Such strategies can consist of highlighting similar (i.e. religious) beliefs, references to tragedies and/or allegedly shared experiences (i.e. losing a loved one in war, a catastrophe etc.), or appeal to the potential victim's self-image. In short, all of these measures try to modify the scammer-victim-relationship by emphasizing similarities of the two. Through the assessment of similarities, scammers try to convince potential victims that they belong to an in-group which leads to a higher degree of likability and thereby trust. Ultimately, likability and trust are supposed to result in a higher degree of compliance and thereby potential revenue for the scammers. As outlined, the likability nudge's aim is the reduction of perceived social distance. One key strategy in the field of email marketing involves the personalization of emails. Due to personalized searches, recommendations, prices, or promotions (Montgomery & Smith 2009, 136), the receiver is tempted to assume that the email's sender knows him/her on a more personal level, i.e. with regard to his/her preferences. Not only does the presented content fit the potential customer's preferences more adequately but, due to the assumed/suspected relationship, the probability of personalized emails being read is higher than standard email, making personalization an "effective tactic" of email marketing (Ellis-Chadwick & Doherty 2012, 848). Kaptein and van Halteren (2013, 1183) come to a similar conclusion when they state that "(repeated) success of the reminder messages is higher when using personalized persuasion than when using the default message[s] […]". After the initial contact with the potential customer, the customer-seller-relationship needs to be cultivated as Marinova et al. (2002, 61) argue: "The heart of relationship management lies in understanding one's consumers: their preferences, purchasing histories, and future purchasing intentions. Studying those factors helps marketers better profile their target audiences for the potential delivery of personalized products and services". Even though these aspects may nowadays be reduced to a matter of data and the analysis thereof, marketers should not forget that the mechanism at work is a psychological one; a mechanism which primarily modifies the customer-seller-relationship aiming at the reduction of (perceived) social distance.

Scarcity: As shown, scammers commonly employ scarcity tactics to persuade potential victims into compliance. Scarcity may be one of mankind's oldest heuristics as scarce has often times been equated with valuable and thereby desirable. While the Nigerian Scammers need to create scarcity by proxy (i.e. authority figures or usage of scarcity related lingua), legitimate businesses can actually create scarcity. The efficiency of the effect led a plethora of marketers to already employ the effect as "[t]he draw of scarce products and offers encourages marketers to commonly employ scarcity appeals in marketing communications to positively influence consumer attitudes and behavior" (Aguirre-Rodriguez 2013, 377). Such persuasive strategies can be translated to email marketing "with announcements such as 'limited quantities', 'until stocks last', 'few tickets left for this event', and 'limit: two per customer'" (Mukherjee/Lee 2016, 1), just to name few. Such short texts try to exploit the heuristics mentioned initially while creating the feeling of urgency. Thereby, decisions formerly falling into the system 2 realm (slow thinking) are now covered by system 1 (fast thinking); this often times results in higher degrees of compliance and sales as well as a decrease in price sensitivity. In the realm of email marketing, scarcity can be used by highlighting supply scarcity or to emphasize the temporal limitations of (seasonal or event-related) discounts – both strategies are already commonly employed in email marketing.

Reciprocity: Apart from the already discussed persuasive strategies, reciprocity can be considered a strong motivational force whose roots are also grounded in evolution. Reciprocity can be considered a "person's innate desire to repay a favor, typically driven by a feeling of indebtedness. Firms already make use of the need for reciprocity, such as when charity organizations increase donations by including small presents (e.g., greeting cards) in their solicitations" (Schumann et al. 2014, 61). As shown, the Nigerian scammers try to exploit this innate desire by sharing stolen and/or forged documents with the potential victim as well as by trying to create immaterial indebtedness (i.e. through overemphasizing personality traits etc.). In contrast, legitimate businesses have only limited possibilities to create reciprocity. One such way could be the linkage of discounts to the customer-seller-relationship (i.e. *a discount only for our most loyal customers*). Outside the email communication spectrum, reciprocity can further be targeted by adding small gifts to the shipped goods. However, due to the immaterial properties of the internet, reciprocity is a strategy which is – at least in the realm of email marketing – comparatively hard to pursue for legitimate businesses.

Authority: As the analysis of the Nigerian Scam could illustrate, humans tend to submit to authority as it is often mistaken for competence. Whether this tendency towards submission is learned or innate cannot be ultimately answered. Further, it could be illustrated that the display of authority – i.e. through ranks, titles, or diplomas – plays a crucial role in the act of (non-)compliance. Therefore, this is one central reason why scammers regularly employ this persuasive strategy. The transfer to legitimate businesses is rather obvious as "there is almost always an opportunity to touch lightly on your relevant background and experience as a natural part of a sociable exchange" (Cialdini 2001, 78). Businesses could display certifications they have earned, elaborate on ranking results they have obtained, or present statistics on customer satisfaction. All of these measures emphasize the authority of the business in its respective field and thereby help to get its key points across more effectively. Also, if a more striking approach is needed, the business could simply label itself as an authority figure in its field (i.e. *The King of [insert relevant field]*); this approach is primarily designed for extremely short communication sequences, i.e. email subject lines. Further, the role of logos, colors, and visuals in email marketing should not be underestimated as "[f]amiliarity, authority and legitimacy can be maintained by adhering to logos or crests as well as corporate colours" (Maguire et al 1999, 299) and "[t]he use of a crest as opposed to a logo suggests a link with a long and distinguished history, as does the application of a Latin or Greek motto" (Foskett, 1992, 163). These can be considered the visual aspects of the authority nudge.

Consistency: As the in-depth analysis of the Nigerian Scam could show, consistency is the scammers' key to extract resources on a continual basis. With regard to legitimate businesses, consistency falls into the category of customer loyalty. As such, consistency is closely related to likability, brand image, customer satisfaction, and aspects related to the purchase (i.e. delivery, return policies etc.). All of these aspects need to function to guarantee long-term customer loyalty. However, if only reduced to communication processes, it can be stated that commitments (i.e. purchasing decisions) are most binding when they were made public and visible (Cialdini 2001, 76). Email communication cannot provide such a forum; however, here lies the potential for a cross-media persuasion strategy. By setting up incentives to make the purchase – in textual form or a visual – public, the seller can cultivate consistent behavior in the future. Incentives to make purchasing decisions visible and public (i.e. on social media) may be lotteries, competitions, or discounts, which are only available to those who post a certain phrase, hashtag, and/or picture of the purchased item. By setting up such incentives, three sales related objects can be obtained. Firstly, through consistency, repeated purchases become more likely. Secondly, by being made public (i.e. on social media channels), the reach of the brand is extended which could lead to an enlargement of the customer base. Thirdly, in case the incentivized campaign reaches a certain threshold of participants, being part of the campaign can become an incentive in itself; a persuasive strategy called the herd mentality (Levitt & Dubner 2016, 116).

CONCLUSION

None of these mechanisms can nudge potential customers to purchase irrelevant and/or completely meaningless items as it is widely assumed "that consumers have a repertoire of strategies to cope with marketing persuasion" (Kirmani & Campbell 2004, 581; Friestad & Wright 1994). Also, the improper and/or illegitimate (over-)usage of these nudges will wear off their persuasive powers. However, in sum, the intelligent and conscious construction, modification, and constant reflection of decision architectures can make the crucial difference between an almost-purchase and an actual purchase.

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KEY TERMS AND DEFINITIONS

Behavioral Economics: Academic discipline which researches human's deviances from rational decision-making.

Decision Architecture: All aspects/influences the decision-maker can consult in his/her decision-scenario.

Nudge: The conscious modification of a decision scenario.

Scam: Fraudulent activity aiming at the victimization of people

System 1/Humans: The intuitive and fast mode of decision-making.

System 2/Econs: The rational, reflected, and slow mode of decision-making.

Section 4

Multilingual Dissemination of Corporate Information

Chapter 8
Websites, Social Networks, and Corporate Translation:
An Overview of Southern Spanish Companies in the Dentistry Sector

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ABSTRACT

The objective of this chapter is to analyze how Southern Spanish companies in the dentistry sector employ Web 2.0 tools available to them and to analyze the availability of multilingual information in their corporate websites. To this purpose, the results of several studies have been gathered in this chapter. These studies considered criteria such as having or not a corporate website and social networks, the translation or not of the website content, and number of languages available, among others. Results show that a significant amount of the analyzed SMEs do not have a website or social networks. In addition, those having a website do not, generally, translate its content, which limits international customer acquisition and the opening to international markets. Concerning social networks, SMEs, which do have social media, generally have small communities, and they do not post frequently, which limit the implementation of digital marketing strategies.

INTRODUCTION

Information and Communication Technologies (ICTs) have meant great change at all levels of society, including the business sphere. Among the opportunities provided to companies by the modern information society, it is worth mentioning the possibility of the global transmission of a message −including corporate information− at a considerably reduced cost, thus allowing entry into new markets and the exploration of different business models.

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ICTs have therefore transformed traditional marketing and are a good indicator of the capacity of businesses to modernize and compete in globalized environments (Peris-Ortiz et al., 2014). Nevertheless, the economic sphere is in continuous flux and uncertainty is a constant for many companies. This situation demands that companies, especially small and medium sized ones (SMEs), have a great capacity for adaptation in order to face the new challenges of an ever more globalized and difficult market. To this end, it is essential for them to take advantage of the elements provided by ICTs when taking their brands to their target audience via the creation of a solid internet presence thanks to the opportunities offered by Web 2.0 tools, including social networks. In addition, it is important for companies to attract potential international customers and, to this end, the multilingual dissemination of corporate information plays a crucial role.

In this sense, the use of ICTs can be a good indicator of the ability of companies to compete in globalized environments as Internet presence allows them to disseminate corporate and commercial information, bringing the brands to their target audience and improving their competitiveness (Alcaide et al., 2013; Chaffey & Smith, 2013; Peris-Ortiz et al., 2014). Nevertheless, despite the advantages offered by the Internet and Web 2.0 tools such as websites and social networks a number of studies have shown that there is still room for improvement when it comes to corporate websites and social networks (Gutiérrez-Artacho & Olvera-Lobo, 2017a, 2017b; Marín Dueñas & Lasso de la Vega González, 2017; Sixto García et al., 2017; Zumba-Zuniga et al., 2016).

In the light of this scenario this chapter aims to examine how Andalusian companies in the dentistry sector use the tools related to the Internet and the Web 2.0 that are available to them. In this sense, the availability of corporate websites and social networks as well as the multilingual dissemination of corporate information has been analyzed and the results of several studies have been gathered in this publication to offer an exhaustive portrait of the situation of Andalusian dentistry SMEs.

BACKGROUND

Digital Marketing: Websites and Social Networks

Digital marketing comprises all the efforts of a company to promote and sell its products or services over the Internet (Kotler & Armstrong, 2007). In addition, nowadays, digital marketing is essential when it comes to building relationships between consumers and business as it serves to promote loyalty (Lahuerta-Otero & Cordero-Gutiérrez, 2015; Piñeiro-Otero & Martínez-Rolán, 2016). Given that the application of digital technologies is essential to achieve profitability and retain clients it is crucial to acknowledge the importance of strategical planning as it will allow to improve knowledge about customers, achieve effective communication and offer online services adapted to individual needs (Chaffey & Smith, 2013).

Having all these aspects in mind, one of the first steps for a company when implementing digital marketing is the creation of an attractive and appealing website in line with its aims and interests (Alcaide et al., 2013; Kotler et al., 2016). In this sense, websites serve as a public relations vehicle for companies and allow them to inform, promote and even sell their products and services (Kotler & Armstrong, 2007). In addition, global markets offer valuable opportunities to companies −specially SMEs−, however, opening new international markets demands cultural and linguistic knowledge (Clavijo-Olmos, 2018). Therefore, translating a corporate website can be of great help in order to develop a strong branding strategy and improve competitiveness (Chhibber & Chadha, 2020; Clavijo-Olmos, 2018; Olvera-Lobo & Castillo-

Rodríguez, 2018). Website localization −the cultural adaptation of the content of a website− promotes SMEs internationalization as it allows them to reach and interact with users from diverse sociocultural and linguistic contexts (Gutiérrez-Artacho & Olvera-Lobo, 2017b). Consequently, according to several studies, translating the content of corporate websites favors geographical expansion, improves the shopping experience, generates trust among users and favors companies' visibility (Ahlfors & Fang, 2017; Chhibber & Chadha, 2020; Gutiérrez-Artacho & Olvera-Lobo, 2017b).

Nevertheless, digital marketing is not limited to corporate websites but it also includes a huge range of resources, among which are social networks as they are a great tool for sharing information, create communities, organize events and interact with customers (Peris-Ortiz et al., 2014). Nowadays there is a transfer of power from companies to consumers and, therefore, it is important for companies to pay careful attention to the opinions and demands of consumers (Shaltoni et al., 2018); moreover, social networks also promote the so-called earned media, which are the comments or posts shared by users in their own social profiles (Ahmad et al., 2018). Consequently, several authors point out the positive impact of social networks concerning aspects such as reputation and brand image (Ahmad et al., 2018), business organization and reduction of marketing and advertising costs (Ainin et al., 2015; Parveen et al., 2016; Tajudeen et al., 2018), opening new channels for commercialization (Elghannam & Mesías, 2018), and for reaching a higher number of potential customers (Franco et al., 2016). Finally, according to several studies, Facebook is the most used social network by SMEs −being sometimes the only social network they use− and followed by other social networks such as Twitter, LinkedIn, Instagram or YouTube (Ainin et al., 2015; Franco et al., 2016; Olvera-Lobo et al., 2018; Sixto García et al., 2017; Srinivasan et al., 2016; Zumba-Zuniga et al., 2016)

SMEs Situation in Europe and Spain

In Europe most of the companies (99.8%) −save for the financial sector− are SMEs (Muller et al., 2019) and 77% of them have a website (Eurostat, 2018) but only 43% of these companies make use of social networks profiles (Eurostat, 2017, 2019). Concerning Spain, the situation is similar to the one of Europe as 99.8% of the Spanish business fabric is comprised of SMEs and 78.2% of them have a website and around 43% use social networks (Dirección General de Industria y de la Pequeña y Mediana Empresa, 2019; Urueña et al., 2017). Andalusia is one of the Spanish autonomous regions with a higher proportion of SMEs and this community follows the national and European trend, as around 70% of them have a website and 48% use social networks (Dirección General de Industria y de la Pequeña y Mediana Empresa, 2019). Therefore, SMEs are essential for both the Spanish and Andalusian economies and that is why there are several initiatives set up to foster the use of ICTs to improve productivity and competitivity among which are the Digital Agenda for Spain (Ministerio de Industria, 2013), the Horizon 2020 Plan for the Internationalization of the Andalusian Economy (Junta de Andalucía, 2015) or the 2020 Stimulus Strategy for the Andalusia ICT Sector (Junta de Andalucía, 2017a), and the Action Plan Digital Enterprise (Junta de Andalucía, 2018a).

With regard to business activity by sector, 81.4% of Spanish companies belong to the service sector (Dirección General de Industria y de la Pequeña y Mediana Empresa, 2020). In Andalusia this figure reaches the 83% of the companies (Instituto de Estadística y Cartografía de Andalucía, 2018). Within this sector, healthcare is the second biggest group concerning business creation in net terms (Dirección General de Industria y de la Pequeña y Mediana Empresa, 2020). These companies belong to the Group Q: Healthcare and social services activities according to the CNAE (National Classification of Economic Activities) (Instituto Nacional de Estadística, 2009). This sector is divided into various subgroups: hospital activities; medical and dentistry activities; and other healthcare activities. Medical and dentistry activities represent around 53% of the total of group Q companies at national level, with approximately 53% of the companies in Spain and 55% of the companies in Andalusia belonging to this sector (Instituto Nacional de Estadística, 2018). The focus of this chapter is on the companies from the dentistry sector as it has experienced a considerable expansion in the last two decades and its growth is continuous (Llodra-Calvo, 2010; Sevilla, 2019).

DESCRIPTION OF STUDIES AND RESULTS

In the following sections the methodology and results carried out from the different studies are presented (Rivera-Trigueros et al., 2019, 2020b, 2020a) in order to offer an exhaustive portrait of how southern Spanish SMEs use Web 2.0 tools and digital marketing strategies. These studies have their focus on the availability of corporate websites and social networks and the multilingual dissemination of corporate information.

Object of Study

The object of study for the different studies was selected from the information included in the Sectoral Ranking of Companies by Turnover (Ranking Sectorial de Empresas por Facturación) offered by elEconomista. This Spanish source includes data from the INFORMA D&B S.A.U. (S.M.E.) database (which boasts the AENOR quality certificate) and it is fed from a number of public and private sources, including the Official Companies Register Gazette, the Official Accounts Records, the Official State, Autonomous Regional and Provincial Gazettes, national and regional press, ad hoc studies and other publications.

The Andalusian companies from the CNAE sector: (8623) Dentistry activities were included in the study sample. This sector, by the time the studies were conducted, contained 4,344 businesses listed in the national ranking, of which 4,307 were SMEs—3,402 of them were small companies and 905 were medium companies. Initially, 516 companies were examined and those companies forming part of franchises or large corporations were excluded as well as those companies whose stated purpose did not coincide with the activities specific to the sector. After the initial screening, the final sample was comprised of 498 SMEs, which represented the 11.5% of the sector at national level, according to the Sectoral Ranking of Companies by Turnover. For the ordering of the companies in the Sectoral Ranking of Companies by Turnover their financial situations filed in the Companies Register are used. Given the close of registration date of the Companies Register, the data obtained corresponded to the year 2017. All the data used in the studies were collected during the first semester of the year 2019.

Analysis Criteria and Instruments

Firstly, the following data was obtained from the information provided by the Sectoral Ranking of Companies by Turnover: Company name; Commercial or brand name (where available); Size according to turnover; Location; and Website address (where available). After that, the data relating to corporate websites, multilingual dissemination and social networks were collected. The indicators were:

- Existence or not of website. If yes:
  - Contact information and social network links visible on website
  - Translation or not of the website. If yes:
    - Number of languages available
    - Languages
- Existence or not of social network profiles. If yes:
  - Existence or not of profile on Facebook, Twitter, LinkedIn, Instagram, and YouTube
  - Number of followers for each network
  - Updating of information: daily, very frequently, frequently, not very frequently, sporadic, rarely, or social network abandoned.

In all cases both websites and social networks were located using either the company name or the commercial name via Internet searches. In those cases where it was impossible to locate the link to a corporate website or social network or it could not be verified the effective belonging of a specific website or social network to a company it was determined that the company did not have, or it was impossible to locate, a website or social network. If the company had a website the site was examined to determine whether it has been translated or not and, if affirmative, to how many and to which languages. Those websites including machine translation plugins were excluded. Languages were compiled according to ISO-639-1 naming convention (International Organization for Standardization, 2002), which establishes a two-letter code to name languages. The languages available on websites were named as: ES (Spanish), EN (English), DE (German), SV (Swedish), FR (French), NO (Norwegian) and FI (Finnish).

Concerning the visibility or lack of links to social networks on the companies' websites, the broken links and those that failed to include all the profiles of the company present on social networks were omitted. Only those links that correctly redirected to al company social network profiles were considered. The analyzed networks were Facebook, Twitter, LinkedIn, Instagram, and YouTube as the use of any other social networks was anecdotal.

To analyze the number of followers the class interval was calculated for each social network profile according to Sturges rules, which allowed to group the data into intervals to facilitate the analysis. Concerning social network updating, the posts made in the last month were used to determine whether the updating was daily (over 20 posts/month); very frequent (16-20 posts/month); frequent (11-15 posts/month); not very frequent (6-10 posts/month) or sporadic (1-5 posts/month). If the company had posted at least once in the last year the frequency was determined as rarely, and it was decided that the social network was abandoned if no post had appeared in the last year.

Results of the Studies

Corporate Websites

Concerning the availability or not of corporate websites, around half of the companies (252 out of 498) did have a website and there are not significant variations according to the size of the company as 53.2% (41 out of 77) of medium-sized companies and 50.1% (211 out of 421) of small companies had websites. As explained before in the Background section, these data are far behind from the regional, national, and European trend which is nearly 80% of SMEs having websites (Ministerio de Economía, Industria y Competitividad, 2018; Muller et al., 2017; Urueña et al., 2017).

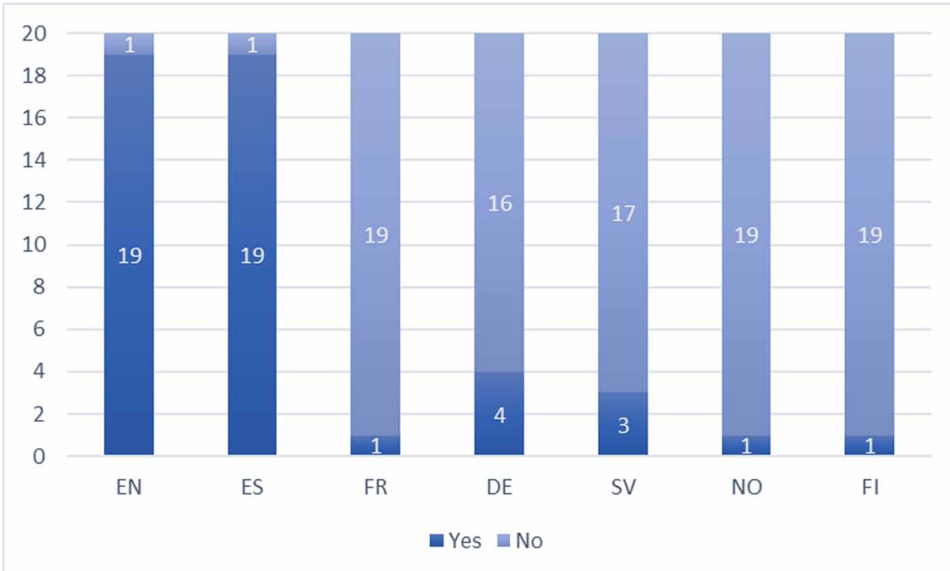
Regarding the location of the companies with a corporate website (Figure 1), Seville is the province which the highest presence of companies having a website, followed by Malaga. On the contrary, the provinces with lowest rates of corporate websites are Huelva, Cordoba, and Jaen. This situation can be explained because Sevilla and Malaga gathered more than half of the analyzed companies whereas Huelva, Cordoba and Jaen represented less than the 20% of the companies. A CHAID (Chi-squared Automatic Interaction Detection) decision tree was carried out to find out if the variables size and location affected the fact of a company having or not a website, but no correlation was found.

Figure 1. Availability of corporate websites according to the location of the company (Adapted from Rivera-Trigueros et al., 2020a)

In addition, only 7.5% of the companies translated their websites to, at least, one language. In this case, medium-sized companies (13.3%) doubled the rate of small companies (6.3%). This companies were located mostly in Malaga, followed by Cadiz. This is no surprising as Malaga is one of the Andalusian provinces with the highest rate of foreign population −from the United Kingdom, mostly− and it is the main tourist destination in Andalusia (Instituto de Estadística y Cartografía de Andalucía, 2019; Junta de Andalucía, 2017b). On the other hand, there are not any companies translating the content of its website in the provinces of Huelva and Cordoba. Finally, it was determined by a CHAID decision tree that the size of the company did not influence the fact of a company translating its content or not, however, its location did have a predictive value (p=0.012, Chi-square =15.246, df=1).

Concerning the number of available languages of the translated websites, most of these companies (65%) only translated their websites to one language and there was not any website translated to more than three languages. Companies normally offered their websites in Spanish and English (Figure 2). However, it is remarkable the fact that one of the companies, despite being located in Spain, did not offered its website in Spanish but in English and Swedish. Translation to German and Swedish was also available in some of the analyzed websites whereas French, Norwegian and Finnish were minoritarian languages.

Figure 2. Languages available in the corporate websites (Adapted from Rivera-Trigueros et al., 2020a)



The use of English can be explained because, as stated about, there is a high number of foreign residents coming from the United Kingdom settled in Malaga. In addition, the presence of languages such as German, French or Nordic languages could be due to the fact that the main tourism flows in Andalusia come from United Kingdom, Germany, France, Nordic countries, the Netherlands and the United States (Junta de Andalucía, 2018b)

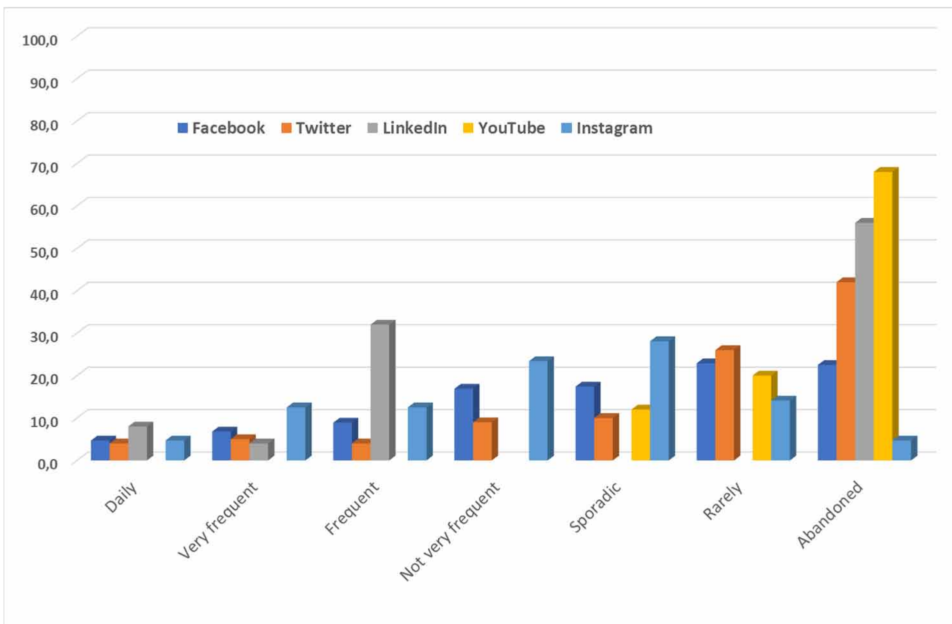
Social Networks

Concerning social networks, around half of the companies (244 out of 498) have profiles on social networks. As in the case of websites, 50.6% (39 out of 77) of medium-sized companies and 48.2% (203 out of 421) of small companies had profiles on social networks. Therefore, no association was found between the company size and the fact of a company having profiles in social networks. However, in this case the data obtained are similar, even slightly higher, than those offered by the last reports about Europe, Spain and Andalusia (Dirección General de Industria y de la Pequeña y Mediana Empresa, 2019; Eurostat, 2019; Urueña et al., 2017). It was remarkable that 9% of the analyzed companies had a website but did not have any profile on social networks, whereas 7% of them where present in social media but did not have a corporate website. In addition, 51.2% (129 out of 252) of the companies with a corporate website included in it a link to their social network profiles.

Most of the companies (91.4%) had between one and three different social media profiles. On the contrary, only 2% of the companies had a profile in each of the five social networks analyzed. The most used social network was Facebook, as 97.1% of the companies having social networks had a profile on it. Only 2.9% of the companies had profiles on other social networks but not on Facebook. This social network is followed by Twitter (41%), Instagram (26.2%), YouTube (20.9%) and LinkedIn (10.2%). The case of LinkedIn is surprising as this social network is specially targeted to business and companies.

Regarding followers, most of the companies had less than 500 followers, which means that social media communities around these SMEs were very small. Facebook was the most popular social network followed by Twitter, Instagram, YouTube, and LinkedIn, which coincides with the most used social networks by the companies. In addition, it is remarkable the abandonment of many social media profiles (Figure 3), being YouTube the platform with the highest abandonment rates (68%), followed by LinkedIn (56%), Twitter (42%), Facebook (22.5%) and Instagram (4.7%). Moreover, very few companies update their social media profile on a daily basis, for instance, only 20% of the companies having a Facebook profile update it regularly –at least 10 post/month–. It is also worth mentioning the fact that, despite not being one of the most popular social networks, Instagram has a very low abandonment rate.

Figure 3. Social profiles updating frequency (Adapted from Rivera-Trigueros et al., 2019)



The Spearman coefficient was calculated in order to analyze if there were correlations among the different variables analyzed (having websites or social networks, numbers of followers, updating frequency, etc.). There was a positive linear directly proportionate correlation between the website and social networks variables (Spearman Rho = 0.679, p = 0.000). This indicates that the fact a company has a social network or not is associated with it having a website.

There was also found a weak positive and directly proportionate linear correlation between the website and existence of a Facebook profile (Spearman Rho = 0.183, p = 0.004) and existence of an Instagram profile (Spearman Rho = 0.260, p = 0.000). However, as the association is weak it could not be concluded that the fact that a company has a website determines whether it has a Facebook and Instagram profile, and it must be presumed that there are further reasons for explaining this dependence. No other correlations were found for the other social networks analyzed –Twitter, LinkedIn, and YouTube. In addition, concerning the visibility of links redirecting to social networks in the corporate websites, there was found a weak negative and inversely proportional linear correlation (Spearman Rho = -0.289, p = 0.000) between it and the number of followers of Facebook. This could suggest that the visibility of social media profiles links in corporate website is not necessarily associated to higher numbers of followers. Again, as it is a week correlation, it should be assumed that there would be further reasons behind this association. For the rest of social networks analyzed −Twitter, Instagram, LinkedIn and YouTube, no relevant correlations were found between links visibility and number of followers.

The correlations between the different social networks was also analyzed. That is to say, a company having a specific social media profile was associated with having profiles in other social platforms. It was found a weak, directly proportional positive correlation between Instagram and YouTube (Spearman Rho = 0.295, p = 0.000), Twitter and Instagram (Spearman Rho 0.242, p = 0.000) and LinkedIn and YouTube (Spearman Rho = 0.224, p = 0.000). These correlations could indicate that, to a certain extent, a company having a YouTube channel is more likely to have profiles on LinkedIn and Instagram, and the same occurs in the case of Twitter and Instagram. However, the correlation is weak so it is assumed that there would be more reasons for explaining this relation.

Finally, the Spearman rank correlation coefficient was calculated to analyze whether the updating of social profiles was associated with follower numbers. In this case, a negative and inversely proportional linear correlation was found between Facebook and Twitter and their number of followers (Spearman Rho = -0.535, p = 0.000; Spearman Rho = -0.297, p = 0.003), which is striking as this could indicate that a more frequent updating frequency may have negative effect on the follower numbers.

Issues, Controversies, Problems

One of the limitations of the studies gathered in this chapter (Rivera-Trigueros et al., 2019, 2020a, 2020b) is its regional focus, as the companies analyzed belong to the Andalusian dentistry sector. Therefore, the results should not be interpreted as a portrait of the situation of Spain nor Europe.

It should also be noted that some of the analyzed companies may had a website or social media profiles but, as the searches were done by the company name or brand name (only when it was available in the information of the Sectoral Ranking by Turnover) some websites and social networks could have been impossible to be effectively located if their brand name was different from their company name and it was not included in the information provided by the Ranking.

In addition, other variables apart from those considered in the study may affect the fact of a company having a website, social networks, and the translation of their content. As a consequence, the correlations detailed in the Results section should be interpreted having this fact in mind. In addition, as explained in the following section, the reasons behind these companies not having a website or social media profiles are unknown and, it could be a possibility that these companies do not use these Web 2.0 tool as they can be perceived by SMES as useless or as a wasting of time, resources or money, among other factors. For instance, a website or social media profile could not be seen as necessary by a company which is based in a small population where everyone knows the service they offer or by those companies which already have high revenues.

SOLUTIONS AND RECOMMENDATIONS

Websites and social networks have been proved a great and low-cost resource for SMEs (see Background section). Despite all its advantages, some companies are still reluctant to have a website a to create a corporate profile on social networks. This may be due to the fact that their use can suppose an extra investment of time and resources. Nevertheless, nowadays a simple corporate website can be created with a limited investment of resources. In addition, most social networks are free to use and they only require an email to set up an account. Regarding the time spent in the updating of websites and social networks, for these companies not having a great expertise in these areas it would be advisable for them to create –or to ask a professional to create– a simple low-maintenance website with basic information about the company purpose, the services they offer and their contact information. As previously seen, it is not necessary to update social profiles constantly, in fact, it could have a negative impact of followers as they may be overwhelmed by information. Therefore, a frequency of publication around 10 posts/months should be enough for a company to consolidate its presence in social networks. Furthermore, it is particularly important for companies to decide in which social media platforms are going to create a profile. In this sense, companies have to ponder which are the advantages and disadvantages of each social network and which are the ones that best suits their objectives. It is advisable to have a profile only in those platforms which are going to be regularly updated as having an abandoned social media profile can have a negative impact on the corporate image. Finally, it is essential for SMEs to interact with their followers in social networks, which is the main purpose of these platforms, in that way they could create communities and engage and retain users and clients.

FUTURE RESEARCH DIRECTIONS

Firstly, future lines of research should consider an expansion of the object of study including small and medium enterprises in Andalusia, Spain, and Europe in the healthcare and social services sector, as well as other economic sectors.

Secondly, it would be necessary to explore the reason behind having or not websites and social networks. In this sense, it is convenient to include mixed approaches, therefore, qualitative research (interviews, focus groups, open questionnaires) can offer a new perspective into this subject. In addition, the globalized society in which we are immerse today cannot be left apart, so more research is needed concerning the internationalization degree of the companies. Consequently, aspects such as web and social network translation, localization and transcreation should be also considered in future studies given the importance of cultural and linguistic adaptation. Furthermore, as the latter can suppose extra costs for companies, other options such as machine translation and post-editing, which is the process of revising machine translation outputs, can be studied to lower translation costs for those companies which cannot afford them.

CONCLUSION

This chapter has offered a complete overview about how Andalusian SMEs from the dentistry sector make use of the Web 2.0 tools available to them. The results of the different studies show that there is still a long way to go for these companies when it comes to take full advantage of ICTs.

On the one hand, many of the analyzed companies did not have a website nor a profile in social media, despite being two great tools for the dissemination of corporate information, attract new clients and get feedback from customers which helps companies to make business innovations. Concerning the correlations among the different variables involved in the study, the size and location of the company where not found to influence the fact of a website having a website or not. It should be pointed out that the SMEs analyzed are almost twenty points behind the European, Spanish and Andalusian average in terms of website availability. On the contrary, concerning social networks usage, the SMEs analyzed were slightly above of these averages. The positive correlation found between these variables—having a website and social networks— indicates that those companies that do use the tools seem to be aware of their combined potential, given that the fact that a company has a website is positively associated with it also having social profiles. Nevertheless, those companies which do have a corporate website and social networks sometimes do not offer any link to social media profiles in the websites. However, it is important to note the fact that a company has links to its social networks on its website is not associated with follower numbers. Therefore, the mere digital presence of a SMEs could not be enough to generate engagement among users. In this sense, it is important for companies to consider social networks and websites as a whole and to make them part of the same communication strategies. In addition, it is important to keep a regular updating of social media profiles, as rarely updated and abandoned profiles can have a negative impact on companies' reputation or brand image. Still, a frequency of updating too high can have negative repercussions on followers, as it was showed by the negative correlation among these variables.

On the other hand, another important aspect for these companies is to take into account the multilingual dissemination, that is to say, to translate the content of their websites and social profiles. This is especially important in areas like Andalusia, which has high tourism and immigration flows. Having a corporate website offered in several languages can mean a great competitive advantage for SMEs. However, companies are not aware of these benefits as less than the 10% of the analyzed companies offered their websites in, at least, two languages. In addition, the location of the companies did have an impact, according to CHAID decision tree, on a company translating or not its corporate website.

Therefore, in the light of the results gathered in this chapter, which has served as a starting point for further exploration of Web 2.0 tool usage on the part of SMEs, it can be concluded that the initiatives and programs set up by public institutions have still room for improvement. As a consequence, it is necessary to keep fostering research and initiatives to support SMEs in their digitalization and internationalization process.

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KEY TERMS AND DEFINITIONS

Digital Marketing: It involves the use of the Internet and ICTs technologies on the part on the companies to reach customers.

Digitalization: It involves the use of digital technologies by business. In some cases, the digitalization can imply moving to a complete digital business model.

Internationalization: It refers to the process of involving companies in international markets. In this process it is essential to bridge the gap between different languages, cultures, and countries.

Localization: It is the process to adapt one text, which can include multimedia content such as images or videos to a local audience, called *locale*. It is commonly used for websites and translation is one of the steps of the localization process.

SME: Small and medium-sized enterprises (SMEs) is the term used to refer companies whose personnel and turnover numbers are below certain limits.

Social Network: It is a platform (website or other kind of application) that allow users to communicate and interact with each other and post information, images, etc.

Transcreation: It is a term widely used in marketing and advertising to refer to the process of re-adaptation of a given message from one language to another with the aim to generate the same emotions in the source and target language by maintaining the intention, style, tone and context.

Web 2.0: It is the term used to make reference to the second stage of the Internet development. Web 2.0 is characterized by user-generated content, ease of use and the development of social media.

Chapter 9
The Role of Transcreation in Corporate Communication:
A Case Study in the US Healthcare Sector

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ABSTRACT

In a globalized world, companies need to have their online information linguistically and culturally adapted to access international markets. Transcreation is an interlingual creative re-interpretation of a text made considering the linguistic and cultural differences between the target and the original audiences. One of the main sources of corporate information is the corporate website. The US healthcare sector is one of the major industries in the world. Hence, studying the characteristics of their dissemination of corporate information is relevant to know the keys of a fruitful corporate communication. The main objective of this chapter is to identify the keys of a web transcreation process. It is divided in 1) to elaborate a set of indicators for evaluating web transcreation strategies and 2) to apply these indicators to a corporate website to exemplify their functioning through a case-study. The website of the company Pfizer is analyzed. The original US-English and the Spain-Spanish websites are compared. The analysis provides the keys to a successful transcreation process.

INTRODUCTION

The term 'transcreation' has been a buzz word in the language services industry in the last decade. It is a translation-derived activity characterized by an interlingual creative re-interpretation of a text taking into consideration that the target audience is different from the audience originally intended (Benetello, 2018; Gaballo, 2012; Pedersen, 2017). It is not only a linguistic translation of the content, but also a cultural adaptation (Fernández Rodríguez, 2019; O'Hagan & Mangiron, 2013). For that reason, in the last years, transcreation has played a role in marketing and advertisement as it has been a popular way for companies to adapt their marketing campaigns to international markets. Some of the typical projects

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that may require the use of transcreation are web campaigns aimed at attracting customers from other markets (Ray & Kelly, 2010).

Globalization brought about by technological advances has opened the world to international trade more than at any other time in history (Song et al., 2016). However, this new scenario has also given rise to many communication problems. One of these problems is the language and cultural barriers between users. Transcreation, along with localization, can represent a crucial activity in the internationalization process of companies of all sizes as it helps to close the gap between them and potential clients from all around the globe. In such a globalized market as today's, it is essential for companies to have their online corporate information linguistically and culturally adapted. One of the main sources of online corporate information (apart from social media profiles) is the corporate website (Olvera-Lobo & Gutiérrez-Artacho, 2017).

The process of adapting a corporate website for a different audience can be given the name of 'web transcreation'. For the purpose of this chapter, the following definition of web transcreation will be considered: a subgenre of transcreation characterized by the re-interpretation or new creation of a website, even without reference to the original. This definition is extracted after the revision of the results obtained in this study. In contrast, there is web localization, which only creates something completely new on specific occasions and is not associated with the idea of creativity in the way transcreation is (Rike, 2013). Localization is more constrained than transcreation, which takes place mainly when the translator is granted almost absolute freedom to modify, omit or even add elements in the adapted material (Mangiron & O'Hagan, 2006). Web transcreation is an activity that produces a specific product, which may be a new website, but which continues to transfer the intention of the original website and, in the case of a corporate website, the brand and the message from one culture to another (Pedersen, 2014).

The healthcare sector is one of the largest in the world. In particular, the US healthcare sector is probably one of the major industries in the world. This is evidenced by the fact that in the Global 500 ranking, published annually by Fortune magazine, which includes the largest corporations in the world, of the 26 healthcare companies included in the ranking, 15 were US-based corporations (Fortune, 2019b). For this reason, studying the characteristics of the dissemination of corporate web information of these companies is especially relevant to know the keys of a successful language management for the internationalization of companies.

The main objective of this chapter is to study the keys of a successful web transcreation process. This objective is divided in two specific objectives: SO1) to design and elaborate a set of indicators aimed at evaluating the presence of web transcreation; and SO2) to apply these indicators to a corporate website in order to illustrate their functioning through a case-study. The website chosen is the corporate website of the company Pfizer, a US healthcare sector company considered to be one of the largest in the industry. The original US-English and the Spain-Spanish websites will be compared in terms of the set of selected indicators. Conclusions on the application of transcreation strategies will be drawn from this analysis. The analysis will show which are the keys to a successful transcreation process.

BACKGROUND

Since the beginning of the globalization of commerce through the Web in the mid-1990s, companies and users –potential clients, often from very different cultures– have found a direct way to connect, which has given rise to countless business possibilities. However, this new scenario has also caused numerous communication problems (Tigre Moura et al., 2016). To overcome these linguistic and cultural barriers, the language services industry provides different professional activities such as translation, localization or transcreation. Even international standards such as ISO 17100:2015 (AENOR, 2016) recognize transcreation as a value added service within translation services.

The idea that a translator should be an “intercultural mediator” has been stated by different academics (Hatim & Mason, 1990; Katan, 2013, 2016). However, translation seems to be constricted by fidelity norms (Katan, 2016). In that context, localization and transcreation appear as evolutions of translation as a professional activity.

Localization is a term traditionally identified with digital and technological products such as software, websites, videogames or mobile applications (Gambier, 2016). It is defined as a communicative, technological, textual and cognitive process through which websites are modified to be used by audiences around the world other than those initially intended (Jiménez-Crespo, 2013). This modification should be made from the linguistic, cultural and technical points of view. This reference to modification or adaptation means an evolution towards the breaking of fidelity norms in order to obtain products more suitable for different audiences. This is, cultural elements as well as technical elements play an important role in localization processes. However, localization is not usually identified with a creative activity (Rike, 2013).

Transcreation is another translation-derived practice that has appeared in the academia in the last years. Should it be not defined as “creative translation”, as that definition implies that translation is not a creative process itself (Benetello, 2018). On the contrary, transcreation could be defined as a merger of the terms *translation* and *creation* (Pedersen, 2014), a complex and emotive process through which some parts of a text are translated, others are adapted and others are (re)created (Díaz-Millón & Gutiérrez-Artacho, 2019). So, transcreation would find itself halfway between translation and copywriting (Benetello, 2018). In that line, transcreation would be different from marketing translation (a translation that aims to evoke an emotional reaction and that goes beyond a faithful representation of a descriptive text) and from multilingual copywriting (the process of creating texts in multiple languages from scratch, with reference to brand and campaign requirements) (TAUS, 2019).

Transcreation is present in different domains such as literature translation (Gaballo, 2012; Katan, 2016), audiovisual translation (Chaume, 2018; Di Giovanni, 2008) and most frequently in marketing and advertising (Pedersen, 2014). In the latter, transcreation plays the role of transferring the message from a marketing or advertising campaign to make it more attractive to a different audience and marketplace while respecting the brand identity (Pedersen, 2014; TAUS, 2019). So, transcreation has found its way in the field of persuasive texts (Benetello, 2018; Fernández Rodríguez, 2019).

Its relation with marketing and advertising makes transcreation a key to internationalization processes of companies of all sizes, as it encourages the multilingual dissemination and cultural adaptation of corporate information. One of the main sources of corporate information is the corporate website (Olvera-Lobo & Castillo-Rodríguez, 2019); that is the reason why it is so important to properly adapt content online both culturally and linguistically.

The transcreation of web content or, *web transcreation*, can be defined as a subgenre of transcreation characterized by the reinterpretation or new creation of a website, even without reference to the original.

Websites belong to a multimodal text type that employs a variety of semiotic resources including verbal text, images, and animations (Rike, 2013). These characteristics convert websites into multimedia products subject to different processes and methodologies when being translated for a different locale, i.e., a specific set of information combining language, region and computer coding (Esselink, 2001).

Multiple strategies can be employed in the adaptation process. Amongst these are the possibility of rewriting or recreating certain parts or certain pages within a website to make it suitable for the target audience. For example, as described by Benetello (2018), when the author was faced in her professional practice to adapt the Norton™ AntiVirus software's taglines from English to Italian, she had to face a multimedia product in which the logo of the company was made part of the text. She then came up with a proposal in Italian that permitted to still use the logo as part of the text, whose translation deviated from the original tagline. However, the Italian tagline transferred the meaning of the original while keeping the visual elements that contributed to generate the meaning.

This recreation can be understood as a strategy within the web localization process. In fact, a decade ago Jiménez-Crespo (2008) was already talking about the possibility of "recreating the language tools, content and functions" of a website as an advanced level of web localization. This strategy of completely recreating would also come to be called web transcreation.

Therefore, we could speak about web transcreation on two different levels (Olvera-Lobo et al., 2019). Firstly, when transcreation involves the creation of a website that is completely different to the original. Up to now this activity was included within the process of web localization, and considered part of the cultural adaptation process. The creative process of the production of a completely new website constitutes the first and widest level of *web transcreation*, given that it means going a step beyond cultural adaptation.

Secondly, there is web transcreation as a web localization strategy. In the process of the translation of the text and cultural adaptation of the website (images, videos, colors, etc.), localizators can find themselves involved in employing transcreation strategies, that is, creating certain parts of the website from scratch. There are certain elements within a website that may be inadequate, offensive or, simply, irrelevant for the public of the target locale. In addition, there may also be elements excluded from the original website that require creation specifically for the localized version. All of these strategies that imply creating or recreating parts of a website are called *web transcreation as a strategy* (Olvera-Lobo et al., 2019). Therefore, in this study, the focus will be on identifying transcreation strategies.

Transcreation, along with localization processes, is key to the internationalization of companies of all sizes and from all sectors.

In some areas, the dissemination of information is a particularly sensitive issue. This is the case of health and healthcare, an interest and concern for the population. In this sense, the Internet has progressively become a regular source of health information by connecting people to health content, experts and support (Song et al., 2016). This means that websites with health information have a considerable volume of users, which leads, among other phenomena, to the fact that medical information websites are among the most translated domains (Jiménez-Crespo & Tercedor Sánchez, 2017).

From the economic point of view, the healthcare industry is also one of the largest business sectors in the world. Proof of this is that in 2019 only the 26 largest corporations in this sector achieved more than 2 trillion dollars in annual turnover (Fortune, 2019b). A large part of this turnover belongs to the United States, as 15 of these 26 corporations are US-based. For these companies, the processes of transcreation of information are key to overcoming the linguistic and cultural barriers that separate them from potential clients. Furthermore, it is especially interesting to learn about the web transcreation strategies that these companies apply in order to draw conclusions and offer recommendations to other types of companies on how to apply transcreation processes.

That is the reason why, for the purpose of this chapter, a company belonging to the US healthcare sector has been selected. In particular, the author has selected the corporate website of the pharmaceutical company Pfizer for two reasons: 1) it is one of the largest in the industry with more than 53 billion dollars in revenue (Fortune, 2019a); and 2) its online corporate information is available in a wide range of languages, including some Spanish varieties, through its corporate website.

MAIN FOCUS OF THE CHAPTER

As stated above, the specific objectives of this chapter are: 1) to present a set of indicators aimed at evaluating the presence of web transcreation; and 2) to apply those indicators to a corporate website in order to illustrate their usefulness through a case-study. Therefore, this chapter is based on three research statements:

Research statement 1: For a web transcreation process of a healthcare corporate site to be successful, it must follow a series of criteria.
Research statement 2: It is necessary to create a classification of recommended criteria to help identify transcreation strategies.
Research statement 3: The application of these evaluation criteria to a case-study website will draw conclusions which will provide the keys to a good transcreation process.

Along this work, the author will try to confirm these research statements. In the first part of this section, the process of elaboration of the mentioned set of indicators will be presented and justified. Then, said indicators will be put into practice to evaluate the transcreation strategies present in a concrete website. In subsequent sections, the results obtained from the application of those indicators and their effectiveness will be discussed. Finally, future research directions will be outlined and conclusions dragged.

Indicators for Transcreation

The idea of defining a set of translation indicators or quality criteria has been present in scientific literature for many years now, may it be for general translation (Colina, 2008; House, 2001; Martínez Melis & Hurtado Albir, 2001; Williams, 2001), may it be for specialized translation such as audiovisual translation (Kajzer-Wietrzny & Tymczyńska, 2015; Marzà Ibañez, 2010), machine translation (Fiederer & O'brien, 2009; Koponen, 2016), or localization (Jiménez-Crespo, 2011, 2015).

However, criteria for transcreation have not yet been outlined or discussed, maybe due to its novelty. The author, then, proposes a classification of transcreation criteria based on a review of scientific literature.

Defining quality criteria for creative texts is extremely complicated, as there are no clear procedures or standards for the creative process (Risku et al., 2017). For this reason, the focus in this study is primarily on identifying which strategies can be used in the language management of a corporate website and, secondly, on identifying if these strategies, creative or not, help the "transcreated" website to fulfil its function. Thus, the intention of this work is not defining "transcreation quality criteria", but to design criteria to identify transcreation strategies.

In a previous work (Olvera-Lobo et al., 2019), an attempt to elaborate a set of criteria to evaluate transcreation was made. In the present work, those indicators have been re-designed and re-organized to compensate for the problems and inaccuracies detected in that previous work.

To design a set of indicators, the starting point is the study by Okazaki (2005) in which the author seeks to identify the standardization strategy in the web localization process of American companies for different European countries. To do so, the author creates a list of elements (called dependent variables) that may be evaluated with a scale of growing similarity indices, in which value 1 would indicate that the element is very different to the localized website, and 5 would mean it is very similar. This study led to the idea of creating a scale of degree of similarity between original and localized websites. It involved a Likert scale of 1-5, adapting Okazaki's model.

Given that the websites are complex types, and in order to be able to carry out an analysis that took into account all of the aspects of a website, indicators were classified into three dimensions. Singh et al. (2012), in their model for evaluating business-to-business (B2B) website localization, proposed three dimensions: context localization, content localization and cultural customization. For the purpose of this study, the author will be considering the following dimensions: 1) context management, 2) content management and 3) cultural customization. The set of indicators was designed considering that it would be applied to a specific type of text: the corporate website. This textual genre has three main characteristics that differentiate it from other genres: a) corporate websites are commerce-oriented and are aimed at attracting customers; b) corporate websites provide content and media to immerse users within the site; c) corporate websites provide services and support to help clients solve specific problems (Schäfer & Kummer, 2013). Therefore, these characteristics were borne in mind while elaborating the set of indicators.

Bibliographical resources consulted for the design of indicators include Jiménez-Crespo (2011), Nord (2012), Okazaki (2005), Singh et al. (2005, 2012), and Wang et al. (2016). A final set of 47 indicators was designed.

Context Management

For this first dimension, indicators that specifically target corporate website have been selected. Those are indicators aimed at meeting clients' expectations when visiting a corporate website. Following the proposals of Singh et al. (2012), indicators in this dimension evaluate trust-generating features of a corporate website, investments made to create relationship with current or potential clients, and communication features. Table 1 shows indicators for this first tier classified following the previously mentioned criteria.

Content Management

In the second tier of this evaluation framework, indicators dealing with the content of a corporate website have been considered. These indicators have been divided into two sub-dimensions: linguistic content and non-linguistic content. As websites are multi-modal genres (Rike, 2013), this classification would cover the whole content of a website. These criteria include extension of the translated content and quality of the target language content (Singh et al., 2005, 2012), different linguistic characteristics of the text evaluated in terms of its similarity with the original website (Nord, 2012) and features of the audiovisual content (Okazaki, 2005). Table 2 presents the indicators defined for this dimension.

Cultural Customization

In the third dimension, indicators aimed at evaluating the cultural adaptation of the website to a specific locale are proposed (Singh et al., 2012). These criteria target different design and brand elements such as, logos, colors, layout, images, etc. (Okazaki, 2005; Wang et al., 2016). This dimension does not evaluate the content of the website, but the interaction of the different intersemiotic elements (text, images,

Table 1. Context management indicators

Sub-dimension	Indicator	ID
Institution Based trust features	Structural Safeguards	1
	Cooperative Norms	2
	Trust Generating Third-Party Assurance Seals	3
Process Based Trust features	Partnerships/Affiliations with Respected Organizations (Industrial Associations)	4
	Company Standing and Performance	5
	Company Management	6
	Company Recognition	7
Relationship Specific Investments	Web Site Personalization	8
	Availability of Dedicated Web services	9
	Transactional Security	10
Communication	Contact Information	11
	Advice	12
	Community features	13

Source: Prepared by the author

Table 2. Content management indicators

<table>
<tr><th>Sub-dimension</th><th colspan="2">Indicator</th><th>ID</th></tr>
<tr><td rowspan="8">Linguistic content</td><td colspan="2">Content Depth</td><td>14</td></tr>
<tr><td colspan="2">Target language quality</td><td>15</td></tr>
<tr><td colspan="2">Topic</td><td>16</td></tr>
<tr><td colspan="2">Textual genre</td><td>17</td></tr>
<tr><td colspan="2">Linguistic functions</td><td>18</td></tr>
<tr><td colspan="2">Style</td><td>19</td></tr>
<tr><td colspan="2">Register</td><td>20</td></tr>
<tr><td colspan="2">Typography and suprasegmental features</td><td>21</td></tr>
<tr><td rowspan="9">Non-linguistic content</td><td rowspan="3">Content of major images of</td><td>Product</td><td>22</td></tr>
<tr><td>Human model</td><td>23</td></tr>
<tr><td>Background</td><td>24</td></tr>
<tr><td colspan="2">Content of the major chart or graph</td><td>25</td></tr>
<tr><td rowspan="4">Content of interactive images</td><td>Flash as opening</td><td>26</td></tr>
<tr><td>Pop-ups</td><td>27</td></tr>
<tr><td>Pop-unders</td><td>28</td></tr>
<tr><td>Banners</td><td>29</td></tr>
<tr><td colspan="2">Audios and videos</td><td>30</td></tr>
</table>

Source: Prepared by the author

Table 3. Cultural customization indicators

Indicator		ID
Website structure		31
Logo		32
Logo placement		33
Frequency of logos		34
Layout in	Top half / right half	35
	Bottom half / left half	36
Colors in	Top half / right half	37
	Bottom half / left half	38
Scrolling limitation		39
Major copy placement		40
Number of images		41
Major images placement		42
Major chart of graph placement		43
Presence of interactive images	Flash as opening	44
	Pop-ups	45
	Pop-unders	46
	Banners	47

Source: Prepared by the author

videos, colors, etc.) to create meaning, and how this interaction may differ for the original audience and the target audience. Table 3 includes indicators for this third tier of the evaluation framework.

To measure these indicators, a Likert scale with values of 1-5 was developed to evaluate the degree of transcreation present in the leaflets. In general, the higher the value on the Likert scale of an indicator, the greater the presence of transcreation, except for the indicators “Content depth” and “Target language quality”.

The indicators “Content depth” and “Target language quality” were evaluated by a 1-5 Likert scale adapted from the work of Singh et al. (2012). Table 4 shows what each scale value indicates for each indicator.

Analyzed Website

In order to prove the usefulness and effectiveness of the evaluation framework defined above, it was applied to a real website. The chosen website is the corporate site of the company Pfizer. This pharmaceutical company is one of the largest U.S.-based health care companies, with over $50 billion in annual revenues and present in almost 60 different countries (Fortune, 2019a; Pfizer, 2020). Pfizer’s original online corporate information is developed in U.S. English, but it disseminates its content in up to 34 different languages, including Spanish. In fact, Pfizer offers its content in Spanish adapted to seven different locales: Argentina, Chile, Colombia, Ecuador, Spain, Mexico and Venezuela.

Table 4. Likert's scale values.

Content depth	Target language quality	Other indicators
1 = Only basic information translated	1 = Very poor	1 = Standardized
2 = Only a short part of content translated	2 = Poor	2 = Slightly Different
3 = Half of the content translated	3 = Neutral	3 = Different
4 = Almost all content translated	4 = Good	4 = Very Different
5 = All content translated	5 = Very good	5 = Unique

Source: Adapted from Singh et al. (2012)

As the set of indicators has been defined in terms of levels of similarity between two websites measured in a 1-5 Likert scale, for the purpose of this study, only the website designed for the locale "Spain" will be analyzed. So, transcreation presence will be evaluated with the linguistic combination English>Spanish.

Data about the website were collected during the first period (January-March) of the year 2020.

Data Processing

The data were processed with the SPSS statistical package through a descriptive statistical analysis. To measure the transcreation indicators, data validation formulae were applied to exclude indicators that did not provide relevant information. The remaining indicators and their scores on the Likert scales described above were then evaluated through frequency analysis. Thus, the presence of transcreation strategies would be identified.

RESULTS

Excluded Indicators

The first step was to validate the data to determine which indicators had not been relevant for assessing transcreation in this specific website. It was decided to exclude from the preliminary analysis those indicators for which no data had been recorded, i.e., those indicators that were not applicable to the analyzed website. Table 5 displays the seven indicators for which all data are missing or blank.

The fact that no data were recorded for those indicators is probably due to the characteristics of the original website itself. For example, indicator 13. Community features, makes reference to the quality and meaning of member features (e.g. blogs, wikis, forums) or comments and reviews from other users (Singh et al., 2012). So, no data were retrieved for this indicator because nor the original US-English website nor the Spain-Spanish one presented those features. This argument would also explain the lack of data for the rest of excluded indicators: as no charts or graphs, or pop-ups or pop-unders were present in none of the websites, no data were extracted.

Table 5. Indicators with no-recorded data

ID	Indicator
13	Community features
25	Content of the major chart or graph
27	Content of interactive images: Pop-ups
28	Content of interactive images: Pop-unders
43	Major chart of graph placement
45	Presence of interactive images: Pop-ups
46	Presence of interactive images: Pop-unders

Source: Prepared by the author

General Overview

Statistical frequency analysis was then applied to quantitatively measure the levels of transcreation strategies in Pfizer's corporate website.

This analysis revealed that 25 indicators (53.2%) scored a value of 5 in the Likert scale, 5 indicators (10.6%) scored a value of 3, 3 indicators (6.4%) scored a value of 2 and 7 indicators (14.9%) scored a value of 1. No indicators scored for the value 4.

In addition to that, the mean value of all indicators was 3.83, and the median and mode values were in both cases 5. These data imply that, in general, indicators scored high values in the Likert scale.

This general overview indicates that the levels of similarity between the original website developed in English and the version developed in Spanish for Spain are rather low. This also may seem to suggest that there is a considerable presence of transcreation strategies in the website. However, a further analysis is needed to prove this affirmation. In order to do so, the indicators where more transcreation presence was detected will be identified.

Indicators with Stronger Transcreation Presence

A total of 25 indicators scored a value of 5 in the Likert scale. For the majority of indicators, value 5 represented that said indicator was unique in the target website in Spanish compared to the original one in English. Depending on each case, this strategy could be a feature of transcreation or not. To identify possible transcreation strategies, indicators will be analyzed for each dimension of the evaluation framework. Table 6 presents a summary of the mean, median and mode values for each dimension.

Table 6. Summary of statistical analysis of frequencies per dimension

Dimension	Mean value	Median value	Mode value
Context management	3,33	5,00	5,00
Content management	4,07	5,00	5,00
Cultural customization	4,00	5,00	5,00

Source: Prepared by the author

For the first dimension, "context management", the following indicators scored 5 for Pfizer's website: 3. Trust Generating Third-Party Assurance Seals, 4. Partnerships/Affiliations with Respected Organizations (Industrial Associations), 5. Company Standing and Performance , 6. Company Management, 8. Web Site Personalization, 11. Contact Information and 12. Advice.

The fact that these seven indicators were completely different or "unique" in the website targeted to the locale "Spain" suggests that there has been a considerable investment of resources, not just to adapt the corporate information for the locale, but for creating services completely tailored to the country. This way, this company connects with users, clients and potential customers in a deeper way.

This kind of deep adaptation talks about an implementation of creative strategies, for example, in the presentation of the contact information. However, sometimes, the difference between the original website and locale's website lies on the lack of this information in the latter. For example, in the website developed for Spain, there is not information available about the leadership or the management of the company (which is available in the original website for the U.S.). Eliciting information can be a successful strategy if this information is considered not to be relevant for the target audience. Whether these strategies are transcreational or not will depend on the final website resulting from the application of a whole set of strategies.

For the second dimension of the model, "content management", the following nine indicators scored a value of 5 in the Likert scale: 14. Content Depth; 15. Target language quality; 21. Typography and suprasegmental features, 22. Content of major images of: Product, 23. Content of major images of: Human model, 24. Content of major images of: Background, 26. Content of interactive images: Flash as opening, 29. Content of interactive images: Banners and 30. Audios and videos.

In the case of the two first indicators, "Content depth" and "Target language quality", these criteria confirm that the linguistic content has been fully translated complying with high quality standards. This suggests that the linguistic adaptation is carried out by language professionals.

As for the other indicators, the treatment of the linguistic and the non-linguistic content suggests the application of creative strategies, especially for the latter. The website for the locale Spain shows images, videos and other visual content ad hoc, i.e., made especially for this website. This is, the (audio) visual content has been mostly re-created in Spanish. This indicates a large application of transcreational strategies.

As for the last dimension, "cultural customization", the indicators scoring the highest value were: 31. Website structure, 35. Layout in: Top half/right half, 36. Layout in: Bottom half/left half, 37. Colors in: Top half/right half, 38. Colors in: Bottom half/left half, 40. Major copy placement, 42. Major images placement, 44. Presence of interactive images: Flash as opening and 47. Presence of interactive images: Banners.

These nine indicators seem to indicate that there has been a massive adaptation of website design for the locale "Spain". The webpages that constitute the structure of the website have been completely re-created targeting a new audience, a new palette of colors has been designed, text has been re-arranged and new images (including interactive images) appear in the new website. For example, in the Homepage of the U.S. website, no banners appear, while in the Spain website, a banner linked to the cookies management section is available at the bottom of the page. This is, the new website is almost a new product in terms of design and layout. This re-interpretation of the website implies the application of transcreational strategies.

Indicators with Weaker Transcreation Presence

A total of 7 indicators scored the value 1 in the Likert scale. For these criteria, value 1 indicated that there were no visible differences between the original and the target website, which could mean that there had not been transcreational strategies applied for them. These indicators will be identified and analyzed for each dimension of the evaluation framework.

For the dimension "context management", indicators with the lowest scores were: 1. Structural Safeguards, 2. Cooperative Norms, 7. Company Recognition, 9. Availability of Dedicated Web services, and 10. Transactional Security. All of them refer to the guarantees and safeguards that a corporate website offers to its clients, including terms of use and conditions (cooperative norms) and information on company's policies (structural safeguards). If the information and services provided on these issues in the original website is accurate and appropriate for clients, it may seem logical that this information and services have not been adapted in the website for a locale. It may also be possible that the similarity between both websites in terms of these indicators is due to the absence of the elements evaluated in both websites. For example, for these websites, none of them offered at the time of the analysis exclusive services for their customers. That is the reason why, the lack of transcreation strategies does not imply that the adaption process is not effective.

For the dimension "content management" only the criterion "17. Textual genre" scored 1 on the Likert scale. That is a logical result, given that the products compared were both corporate websites.

Finally, for the dimension "cultural customization", only the indicator "34. Frequency of logos" scored a value of 1 on the Likert scale. This result implies that, even if in the target website the design and the placement of the company's logo may change slightly, it appears on both websites with a similar frequency. This may be due the desire of maintaining the brand identity transmitted by the logo.

The fact that the indicators mentioned above did not suggest the presence of transcreation strategies does not prevent the final product from being transcreated. Furthermore, these indicators scoring low values could even have a positive impact on the transcreation process. In the following section, it will be attempted to identify the keys to identify if a product has undergone a transcreation process.

Keys of the Transcreation Process

After comparing Pfizer's corporate websites for the U.S. and for Spain, it can be concluded that the latter complies with many of the criteria defined in the evaluation framework for transcreation strategies. The final website produced in Spanish is almost a new product, with little similarity to the original. In this transcreation process, four main features have been identified.

First, one of the main characteristics of a healthcare corporate website that has undergone some kind of transcreation process is that it offers exclusive information for the target locale. This includes identifying the needs of the locale and targeting the corporate information displayed in the website to those needs. The reasons for doing so may not have been motived by transcreation decisions: they may be due to marketing strategy decisions or even regulatory issues (as healthcare is a regulated by different authorities in different countries or continents).

Second, a key aspect of web transcreation is fully translating the linguistic content following high quality standards. This aspect is also key in localization and in any translation process. Nevertheless, transcreation is a translation-derived activity which goes one step forward cultural adaptation.

Third, another feature of a transcreated website is hosting a new non-linguistic (audiovisual) content tailored for the target locale. As websites are mainly multimodal textual genres, the successful adaptation of all this content is key to conveying the original message, the meaning intended and the brand identity of the company itself.

Finally, in line with *transcreation as a practice*, a process in which the final product is almost a completely new website with no or with little relation with the original one, a new design, layout, and organization is produced. As well as the audiovisual content, these elements in a website interact to generate meaning. So, in a transcreated website, those elements are also re-created.

FUTURE RESEARCH DIRECTIONS

New lines of research can depart from this study. In the first place, as this work is a case-study and, therefore, limited, the set of indicators designed should be applied to a larger sample of texts in order: 1) to empirically validate the evaluation framework, and 2) to extract evidence-based conclusions about the key practices and phases of a web transcreation process. Thus, the first step in future research directions should be to collect a sample of U.S.-based corporate websites from the healthcare sector, to evaluate them following the transcreation evaluation criteria and, to process the data extracted to refine the evaluation framework. Further lines of research will include to replicate the study with other linguistic combinations. Also, as transcreation is present in a wide range of materials, another research direction could be designing a set of indicators targeted and tailored to another type of texts and evaluate a new sample, thus expanding the scope of the study of transcreation.

Finally, a limitation for this study is the lack of knowledge about the localization/transcreation workflow. As Pfizer is a big multi-national company, there is no possibility to know if a website for a locale different from the originally intended is a result of localization or transcreation process or if it is the result of two different websites developed independently, without or with little rapport between them. That is the reason why future research directions could explore the web transcreation workflow.

CONCLUSION

In the introduction to this chapter, one main objective was established: to study the keys of a successful web transcreation process. This objective was divided into two specific objectives. First, to design an evaluation framework for the presence of web transcreation. This objective has been achieved as a set of indicators aimed at evaluating web transcreation have been presented after a bibliographical revision of scientific literature on the topic. The second specific objective proposed for this work was to apply these indicators to a corporate website in order to illustrate their effectiveness through a case-study. Indeed, a corporate healthcare website has been evaluated using the set of indicators and the functioning and the effectiveness of the evaluation framework has been exemplified as the transcreation strategies of the analyzed website have been pinpointed.

Thus, the three research statements proposed for this work have been proven. The key processes of web transcreation have been identified through a case-study (Research Statement 3) by elaborating a classification of recommended criteria (Research Statement 2) that were necessary to be met for the web transcreation process to be successful (Research Statement 1).

However, the limitations of this study should be mentioned. In the first place, only one corporate website has been analyzed, which means that the conclusions extracted could be biased. It should be considered that the company chosen, Pfizer, is one of the largest multinationals in the world, which means it can make an investment of resources allowing them to tailor their business to the different countries where they have headquarters. Therefore, this company may invest on the application of a set of transcreational strategies that might not be affordable for other small or medium-sized companies. This is, the keys to a successful transcreation process mentioned above should be considered as recommendations for the transcreation of corporate websites, and not as quality evaluation criteria. As transcreation is mainly a creative and subjective activity, it is difficult to establish quality criteria. Different levels of creativity can intervene in the transcreation process in order to produce a high-quality product that fulfills the expectations and intentions originally intended.

That is the reason why, even if this evaluation framework has proven useful to identify transcreation strategies, it is necessary to analyze a larger sample of websites to refine the model and to be able to offer recommendations for transcreation practices.

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KEY TERMS AND DEFINITIONS

Linguistic Management: Linguistic management is understood as the application of communicative management strategies in response to business internationalization processes.

Locale: Locale is understood as a group of users with specific linguistic and cultural characteristics for whom a multimedia product is intended.

Transcreation Strategy: Transcreation strategy is understood as a tactic or method of creative interlingual reinterpretation of a text by which it is adapted with variant levels of similarity to the original.

Webpage: Webpage is understood as each of the sections or sub-sections that, connected by hyperlinks, form a website.

Website: Website is understood as a combination of webpages interconnected with hyperlinks, and grouped under a specific domain.

Chapter 10
Quality Evaluation and Workflows in Transcreation: A Social Study

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ABSTRACT

This chapter is oriented to provide some knowledge about two areas in transcreation that have not been thoroughly researched in this field: workflows and transcreation. For this purpose, a social methodology is proposed. By interviewing a group of four professional transcreators, it is expected to obtain more information on these two areas. Taking into account the results obtained in these interviews, a general workflow diagram is proposed. Likewise, a general quality assessment model is suggested for transcreation. Due to the nature and limitations of this proposal, the representativity of these items should be considered as limited, though it offers a good starting point for further research.

INTRODUCTION

At the beginning of the 21st century, transcreation, a modality of interlinguistic creative adaptation, was an obscure term with a fuzzy meaning, only known to a small group of practitioners in a niche market. Since then, it has grown to become one of the most active trends in the language services industry.

As a consequence of the development of this phenomenon, a growing number of research initiatives is filling the gap on what we know about transcreation. However, there are still several fields where available knowledge is limited. This proposal tries to shed some light in two key areas that have been scarcely researched: transcreation workflows and quality in transcreation.

For this purpose, first of all, a theoretical approach is provided on the practice. Then, the methodology followed is described (a social study where a group of four transcreators has been interviewed) and the expected objectives to be achieved. Finally, in the conclusion section, a general diagram for transcreation

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workflows and a quality model are proposed, both based on the results obtained. To close the chapter, several future lines of research are described.

BACKGROUND

Transcreation as a Service

Transcreation is an intersemiotic creative practice. In order to define it, first we must understand that there are different perceptions on the phenomenon. On one hand, we find those who consider it a *service*. This is perhaps the most extended view, since this is the one more closely linked to the language services industry. According to Pedersen (2014, pp. 59-61), transcreation is a practice that 1) implies the creative adaptation of marketing, sales and advertising content, 2) implies a change in the original terms and meanings, giving priority to the effect and impact caused, 3) where the brand concept plays an important role, even if adapted to the audience, and 4) that can be considered an added-value service.

Though many authors broadly agree with this list of characteristics, some conceptual differences can be found. This is the case of Benetello (2017), who considers that copywriting plays an essential role in the transcreation service, which is defined as "writing advertising or marketing copy for a specific market, starting from copy written in a source language, as if the target text had been originated in the target language and culture."

Copywriting is not the only set of skills required for transcreation. Benetello (2018) adds to this list language skills, cultural sensitivity and local market understanding. In this sense, transcreation goes beyond the limits of a traditional language service to become a type of consultancy service. Sattler-Hovdar agrees with this idea, by defining transcreation the following way: "Transcreation = Translation + Copywriting + Client Guidance" (2019).

Other players in the language services industry offer alternative views. This is the case of TAUS, an industry organization that provides the following definition in a best practices document (2019):

[Transcreation] can be defined as a translation that is enhanced by creativity and focus on style, register, and emotive impact, and modified to suit a new audience which can be a group of users, a country, a region, etc. Typically it covers advertising, banners, slogans, word logos. It can also be defined as a process that is allowed to be "free" and intended to capture not just the factual/technical aspects and the information content, but also the emotional effect on the reader. As a result, transcreated content is by nature more subjective. Trust from the stake-holder in the transcreator is important. Building trust comes from the right preparation, a detailed brief, some rounds of suggestions and idea-exchange. Transcreation is found most often in advertising content, or brand-orientated content, where the principal aim is to sell to customers, and where taglines or straplines often require intensive reworking.

This proposal establishes a conceptual difference with the ideas of Benetello and Sattler-Hovdar, since TAUS considers that transcreation and multilingual copywriting are different services:

[Multilingual copywriting] can be defined as the process of creating texts in multiple languages from scratch, with reference to brand and campaign requirements, and normally based on a detailed briefing by the client. [...] What distinguishes copywriting from transcreation is the absence of a source text.

TAUS also establishes some differences with part of the characterization proposed by Pedersen. The concept of brand would play a role within the scope of copywriting and transcreation, while marketing translation would be an independent service.

[Marketing translation] can be defined as rendering a translation that is intended to evoke an emotional reaction (desire to buy…) and going beyond just a faithful rendering of a descriptive text. [...] Marketing translation is applied to material that is used for content marketing which can be physical brochures or web content, product collateral and event information. Some corporate presentations and some marketing- led newsletters also require marketing translation.

At this point, we may claim that there is a shared view on transcreation as a 'creative adaptation service', though there is no clear consensus on the characteristics and, more importantly, the limits of the practice, at least in academic terms.

Transcreation as a Strategy

Though transcreation as a service is the predominant view on this practice (and the one that will be studied in this proposal), it is not the only one, since we find several scholars that consider this phenomenon a *strategy*.

While transcreation today is mostly linked to advertising, marketing and similar fields, this was not always the case. The origins of transcreation as an intersemiotic creative practice are found in the field of literary translation, mostly in the works of Lal (1996) and De Campos (2013). These two writers reflected on how this type of translation requires a specific approach that goes beyond 'classical translation.' This idea has been more recently explored by authors such as Dybiec-Gajer et al (2020) in the field of children's literature translation or by Glance and Jaccomard (2019) in theater translation.

Transcreation as a strategy is also relevant in audiovisual translation. According to Malenova (2017):

...transcreation in AVT can be defined as a strategy of creative rethinking of a source text segment with subsequent generation of a totally new target text segment in conformity with the given AV context as a polysemiotic complex, taking into consideration characteristics of the communicative situation, technical constraints and an anticipated response of the spectators.

Chaume (2018) agrees with Malenova and establishes a link between audiovisual transcreation as a form of transcreation and localization:

Transcreation is an enhanced type of audiovisual translation mode, and is a direct consequence of digitalisation. [...] Transcreation is a combination of globalisation and localisation, a process referred to as glocalisation, a process whereby a global product is moulded in order to meet the needs of local consumers.

In this line, videogame localization, which might be placed in an intermediary position between audiovisual translation and software localization, is another domain where transcreation as a strategy takes place. According to Mangirón and O'Hagan (2006):

…game localisers are granted quasi absolute freedom to modify, omit, and even add any elements which they deem necessary to bring the game closer to the players and to convey the original feel of gameplay. And, in so doing, the traditional concept of fidelity to the original is discarded. In game localisation, transcreation, rather than just translation, takes place.

Transcreation as a strategy is not an exclusive practice of the creative domains. In fact, some authors consider that it can be found in areas such as science (Musacchio and Zorzi, 2019), law (Gaballo, 2012), or compliance, technical communication, or learning (Law, 2017).

Workflows in Transcreation

If we analyze the language services industry, we find an ample set of standards that clearly define the workflows that should be followed in translation projects: EN 15038:2006-08 establishes the service requirements for translation services, ISO/TS 11669:2012 provides general guidance for all phases in translation projects, and ISO 17100:2015 specifies the requirements for all aspects of the translation process directly affecting the quality and delivery of translation services.

While these norms provide ample information about how to handle projects for translation and other similar linguistic services, this would not be the case for transcreation. In fact, this service is only mentioned briefly in ISO 17100:2015 in a non-exhaustive list of value-added services.

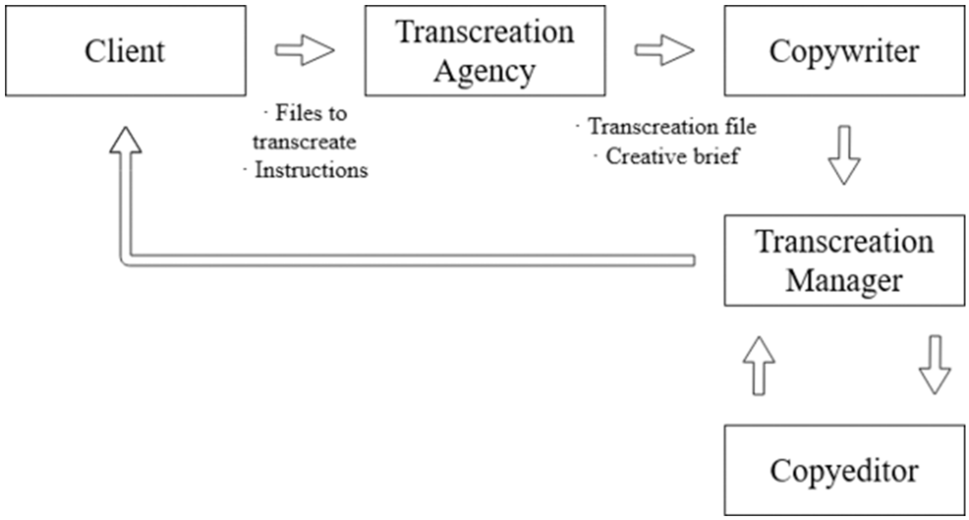
Transcreation is provided by many companies in the language services industry. However, we should not use this fact to conclude that this service follows the same project management procedures which are commonly applied in translation and similar practices. After all, the characteristics of transcreation seems to make it an independent service with specific requirements. Likewise, transcreation is offered by companies that belong to other industries that do not belong to the linguistic services area, such as advertising or marketing.

If we take into account the ethnographic study carried out by Pedersen (2017), transcreation projects would follow a workflow similar to the one below:

Pedersen's proposal is a good starting point to analyze transcreation workflows, but we must take into account that the author states this is not a universal model: "The guide was formulated by the agency under investigation in this study and should thus not be seen as representative for the entire transcreation industry, but merely as an example of how the transcreation process can be shaped." Likewise, it is important to understand that "the term 'transcreation' has been adopted to address the translation (and language) processes taking place in international advertising and business marketing" (Morón Martín, 2020). In this sense, it must be considered that the transcreation workflow is a part of a bigger and interdisciplinary process that connects different realms (advertising, marketing, language services). If we take into account the process description and roadmap for advertising agencies by Burgoyne (2013), we may see that transcreation would be a subworkflow within the production process of an advertising campaign. Therefore, the step described by Pedersen as "Client" is, in fact, a richer and more complex production structure.

The above workflow proposal also mentions some elements that seem to be key differentiators from translation projects. Perhaps one of the most important is the transcreation brief. According to Carreira (2020a), this document "details the information, instructions and guidelines that transcreators must follow and take into account in order to adapt a campaign to a local market." We also find the concepts of back-translation and rationale (Morón & Calvo, 2018). The first element allows the client to understand

Figure 1. Workflow in transcreation projects. Own elaboration based on Pedersen (2014).



the proposals of the transcreators when they do not speak the target language. The second conveys the logic followed by the transcreator to produce the options for consideration by the client.

Finally, in order to improve our understanding on transcreation workflows, case studies can be an interesting source of information. These are publicly available in Internet and are mostly published by companies providing this service as a marketing resource. One example of this type of document is the one published by the British company Intonation about its work for Panini (https://tinyurl.com/y5koskzl). Real case studies such as this are quite useful since they allow to infer how projects are developed versus an idealized vision of this execution provided by a theorical or ideal framework.

Quality in Transcreation

Quality in translation has been a well-studied issue in translation studies. House (2001, 2014) provides an interesting and complete compilation of the existing theoretical approaches on translation quality assessment:

- **Mentalist views:** those based on the subjective and intuitive evaluations of translations (Bühler, 1998; Stolze, 1992).
- **Response-based approaches:**
    - Behavioristic views: based on the idea of equivalent response to translation. A good translation would cause a response in the target readers similar to the one experience by the readers of the source text (Nida, 1964).
    - Functionalistic, “skopos” approach: based on the idea of ‘skopos’ or purpose of the translation. A good translation would be the one that fulfills the expected function described by the one commissioning it (Reiss & Vermeer, 2014; Nord, 2005).
- **Text-based approaches:**

- ◦ Literature-oriented approaches (descriptive translation studies): translations are mostly evaluated in terms of its forms and functions inside the system of the receiving culture and literature. This approach is mostly based on the polysystem theory by Toury (2012).
- ◦ Post-modernist and deconstructionist thinking: these approaches try to critically examine translations from a psycho-philosophical and socio-political to unmask unequal power relations, which may appear as a certain skew in the translation (Derrida & Levesque, 1992; Venuti, 2012).
- ◦ Linguistically-oriented approaches: these consider the source text, its linguistic and textual structure, and its meaning potential at various levels as the most important factor (Baker, 2018; Hatim and Mason, 2005; Steiner, 1998).

These and other approaches have provided the theorical framework to explore translation quality evaluation. However, they are not the best option to solve the issues that companies face on a daily basis in the type of projects carried out in the language services market. In order to solve this gap, some norms have been developed, such as ISO 17100:2015 (Translation services — Requirements for translation services) or ASTM F2575 – 14 (Standard Guide for Quality Assurance in Translation). These provide guidelines for quality management, though from a general perspective. For a more specific and granular evaluation, the industry uses translation quality evaluation models. Some of the better known include LISA QA Model (no longer available due to LISA's insolvency, but still a de facto industry standard) (Lommel, Uszkoreit and Burchardt, 2014) and TAUS DQF (Van der Meer et al, 2017). These are rate error models, based on error counting and a subtractive model of translation quality, where a score indicates the quality and where different categories and levels of importance are available to showcase the different issues found (Doherty and Gaspari, 2013). Specific models have also been developed for certain domains, such as machine translation. These evaluation methods are adapted to the nature of these practices. Some examples of these include BLEU (Papinemi et al, 2002) or METEOR (Satanjeev & Lavie, 2005).

While translation assessment is a well-studied issue, this would not be the case for transcreation quality. There are few academic publications that tackle the topic, mostly related with transcreation evaluation in training environments (Morón & Calvo, 2018; Huertas Barros & Vine, 2019). However, there seem to be no general model for this purpose. Some possible explanations for this situation include that the transcreation practice is relatively new in the language services industry. Likewise, transcreation is a creative practice. Therefore, it might seem useless to develop a tool to measure and assess creativity, especially if we consider that this is a *skopos*-dependant practice whose validity depends on the needs and the perceptions of the final customers.

In relation with the views of the industry, some publications shed some light on this matter. For ROI Group, some of the elements that determine the quality of transcreation include a quality source text, a proper briefing, reference materials related with previous transcreation projects and feedback (Thomas, 2019). Localize mentions some parameters that help in measuring transcreation quality. A well-defined goal, solid briefing practices, testing the transcreated content and providing feedback (Patrick, 2019). Finally, RWS Moravia provides in its blog (2015) a bit more of detail on the issue, mentioning some elements that must be evaluated in transcreation, such as individual performance, creative rationale provided, the effectiveness of final output (that can be assessed through objective corroboration, extra reviews, market surveys and blind A/B testing) and the ability to resolve transcreation issues.

Concerning the evaluation of creativity, some interesting initiatives can be found in this topic, mostly from a psychometric perspective. These proposals examine creativity in terms of creative potential: the ability of an individual to generate new and useful content (Sternberg & Lubart, 1999). Applying different methods, such as Torrance's Tests of Creative Thinking (1998), Guildford's Battery (1967) or Wallach and Kogan Creativity Tests (1965), a numerical value can be obtained, that determines a relative degree of creativity.

A specific approach of this type can be found in the field of translation creativity. The TRANSCREA project (Rojo López, 2019) follows a psychometric strategy to determine the level of creativity in translations carried out by undergraduate students of different types of textual genres, such as literary, informative, economic or technical texts. While this initiative is quite promising in terms of creativity assessment, it may proof to be too complex to be applied in a professional context, where time is of the essence. In any case, it provides the required ground to show that a method to assess quality in transcreation might not be an impossible endeavor.

METHODOLOGY AND OBJECTIVES

The aim of this proposal is to learn more about two areas in transcreation where, as shown in the previous sections, research is scarce: workflows and quality. If more information can be obtained about these interrelated areas, not only the knowledge available about these will be improved, but also the ability to use them as a formal basis to improve the definitions and characterizations available on the practice of transcreation.

For this purpose, an exploratory strategy will be followed. It is not expected to obtain representative information or universal conclusions, but to establish whether further research can be carried out in this area. In methodological terms, an exploratory-interpretative paradigm (Grotjahn, 1987) will be followed. This means applying a non-experimental design, where qualitative data are used, followed by an interpretative analysis. For this proposal, semi-structured interviews (Robson, 2002) are being used. This method seems to be the optimal one, since the areas to be researched are not clearly defined. Likewise, this type of social study has been successfully applied both in other linguistic-related areas (i.e., Pérez, 2017; Risku et al, 2017) and in transcreation (Carreira, 2020b; Carreira y Botella, 2020).

The interviews took part in September 2020 and were carried out by videoconference. All interviews were recorded. The content was anonymized to meet the ethical standards in social research (CSA, 2012) and transcribed (a copy of the transcriptions can be downloaded here: https://tinyurl.com/y4tc8c8v).

The selection of participants for the interviews has been restricted by the exploratory nature of the study and the lack of resources to carry out a broader study. Therefore, the search has been based on the personal network of professional contacts of the author and the ability and willingness of these to take part in the study. 4 freelance linguists were interviewed. All of them were women, with a range of 30 to 42 years old. Their language combinations include the main European languages (English, French, German and Italian). All of them are experienced linguists (7 to 15 years). The part of their workload devoted to transcreation is no less than 33% and no more than 60%. A detailed breakdown of the sociodemographic features of the group of participants is shown in Table 1.

The questions made to the participants are detailed in Table 2, where the objectives of each one and the expected information to be obtained are detailed.

Table 1. Sociodemographic characteristics of the interviewed professionals

	Subject 1 (S1)	Subject 2 (S2)	Subject 3 (S3)	Subject 4 (S4)
Age	42	34	30	32
Gender	Female	Female	Female	Female
Language combinations	English > Italian English > German	English > Italian Italian > German Portuguese > German	English > Spanish English > Catalan	English > French German > French
Professional experience in years	15	7	9	8
% of workload devoted to transcreation	50-60%	60%	40%	33%

The answers provided by the participants have been analyzed following a thematic content analysis approach (Braun et al., 2019).

Table 2. Questions made to the participants with objectives and rationale

Question	Objectives and expected results
Q1. For what types of customers do you usually provide transcreation services?	- Determine the types of customers linguists provide transcreation services to - Establish whether transcreation workflows come mainly from the language industry (language service providers) or others (advertising, marketing, communication, etc.)
Q2. Could you describe the different steps of a standard or ideal transcreation project?	- Determine if linguists follow a 'standard' process to transcreate - Establish whether transcreation, as a creative activity, must be free from the constraints of an established process
Q3. What kind of materials do you receive when working on a transcreation project?	- Determine if there is a 'standard' list of materials required to transcreate properly - Establish the items of this list
Q4. Let's say that you are working in a transcreation project. Do you usually have some kind of communication with someone who works for the final customer or who is in charge of the marketing workflow?	- Determine if there is direct communication with the persons of contact/in charge of a transcreation project (marketing managers, transcreation project managers, etc.) - Establish if this communication process (if any) is different when we find an intermediary in the workflow (e.g., a translation agency)
Q5. Let's say you are reviewing a transcreation project done by another professional. What elements do you take into account to consider whether the job was carried out properly?	- Determine a list of items to take into account when the quality of a transcreation is assessed
Q6. Do you consider that it is possible to create a standardized method to assess quality in transcreation projects?	- Establish is quality assurance standardization is possible (for example, in a similar way to scorecards or LQAs)
Q7. What would be the main skills required to provide top quality transcreations?	- Determine a close list of skills that could be used for the recruitment and evaluation of transcreation professionals

RESULTS

In this section, we provide the more relevant fragments of information for each of the questions mentioned above. The answers for question Q1 are detailed in Table 3.

Table 3. Answers to question Q1

	Subject 1 (S1)	**Subject 2 (S2)**	**Subject 3 (S3)**	**Subject 4 (S4)**
Q1. For what types of customers do you usually provide transcreation services?	- Direct clients - Translation agencies - Transcreation agencies - Production agencies Work volume coming mostly from direct clients and translation agencies)	- Translation agencies - Direct customer Work volume coming mostly from translation agencies	- Advertising agencies - Marketing agencies	- Translation agency - Direct customers - Marketplace

Here, we can see that transcreation projects come mostly from direct clients and translation agencies. These two categories are mentioned by all subjects but S3. Likewise, S1 and S2 make specific references to the fact that these two types of customers provide most of their workload. The remaining types of clients (advertising, marketing, production and transcreation agencies) seem to play a minor role in the access to this type of jobs. This might indicate that these players operate in a smaller niche market or the presence of a bias caused by the selection and the small size of the interviewed population.

The answers for question Q2 are detailed in Table 4.

Table 4. Answers to question Q2

	Subject 1 (S1)	**Subject 2 (S2)**	**Subject 3 (S3)**	**Subject 4 (S4)**
Q2. Could you describe the different steps of a standard or ideal transcreation project?	1. Customer consultation 2. Briefing call 3. Analysis of brief and materials 4. Brainstorming 5. Selection 6. Backtranslation 7. Rationale 8. Feedback and amends 9. Voiceover direction (not always)	1. Briefing call 2. First draft 3. Writing power words 4. Brainstorming 5. Transcreation - first version 6. Transcreation - final version	1. Brief from client 2. Analysis and brainstorming 3. Transcreation (including backtranslation and rationale) 4. Back and forth with the client	1. Brief and materials 2. Transcreation 3. Proofreading

Though the participants provide different answers for these questions, all seem to be oriented in the same direction and the only major difference found is the level of detail provided to describe the workflow. In this sense, a higher level of alignment is detected between subjects S1, S2 and S3, while subject S4 provides a more classical view, reminiscent of the translation workflows.

There is a clear element present in the four answers: the brief; this would be the one that clearly distinguishes transcreation projects from other types of jobs. Likewise, some other specific stages are mentioned, such us providing backtranslation and rationale for the transcreation provided (subjects S1, S3), as well as a feedback step that includes bidirectional and repeated communication with the client (S1 and S3, S2 mentions it in an indirect way when referring to the different versions of transcreation provided).

The answers for question Q3 are detailed in Table 5.

Table 5. Answers to question Q3

	Subject 1 (S1)	Subject 2 (S2)	Subject 3 (S3)	Subject 4 (S4)
Q3. What kind of materials do you receive when working on a transcreation project?	- Brief* - Materials (video, copy, visuals) - Glossary *Written/call	- Brief* - Source and reference materials (including visuals) *Written/call	- Brief* - Images/videos + extra materials *Written	- Brief* - Style guide - Glossary - TM *Written, exceptionally a call

The role of the brief as a defining element of transcreation projects is confirmed again in this question, where the answers are aligned with those mentioned in table 4. Concerning this concept, the participants were specifically asked to elaborate on the nature of these concepts, since the term seems to be used both to refer to the *transcreation brief*, the written document with instructions and indications by the customer, and the *briefing with the customer,* a meeting or video call between the transcreator and the client, where information about the project is provided. Both appear to fulfill the same function, but the terminological distinction seems to be important here, especially considering that some of the subjects receive both brief and briefing, while others not. In any case, the analysis of the answers seems to show that the first option, a written format, is the most frequent.

The brief/briefing seems to be the first item of the deliverables received. The rest of answers could be grouped in two categories: materials to be transcreated (copy, videos, images, etc.) and reference materials.

The answers by S4 require further analysis, since the subject mentions that they work with a TM, a resource typical of 'classic' translation projects. When asked about this point, they detail that, in its case, transcreation projects are carried out in an online translation environment tool. This might point

Table 6. Answers to question Q4

	Subject 1 (S1)	Subject 2 (S2)	Subject 3 (S3)	Subject 4 (S4)
Q4. Do you usually have some kind of communication with someone who works for the final customer or who is in charge of the marketing workflow?	Yes, even in agencies	Yes, even in agencies	Yes, a combination of communication with the agency and the direct customer	Yes, some privacy measures are involved

to a different type of approach to transcreation or, more probably, to a wrong perception on the nature of transcreation projects.

The answers for question Q4 are detailed in Table 6.

The results obtained in this question clearly confirmed something anticipated in the results for question Q2. Communication between the client and the customer is an important element of the transcreation workflow and this takes place even when an intermediary is in place. In this sense, the idea that the presence of an agency may have a negative effect on the bidirectional flux of information between final client and transcreator seems to be wrong, at least for this type of jobs.

The answers for question Q5 are detailed in Table 7.

Table 7. Answers to question Q5

	Subject 1 (S1)	Subject 2 (S2)	Subject 3 (S3)	Subject 4 (S4)
Q5. What elements do you take into account to consider whether the job was carried out properly?	- Tone of voice - Brief adherence - Grammar and spelling correctness - Correct style (formal/ informal, repetitions) - Good rationale - Glossary adherence - Specific restrictions - Syntax	- Brief adherence - Tone of voice - Presence of product/ service qualities or characteristics - Use of creativity just because - Huge deviations without explanation (bad rationale)	- Brief adherence - Right balance of creativity	- Guidelines adherence - Style adherence (formal/informal) - General meaning - Intent/objective meeting

Here we find two clearly defined quality criteria. The first one is if the brief (or guidelines) instructions have been followed. This one was mentioned by the four interviewed subjects. The second one is using the right tone of voice (described as ‘style adherence’ by S4). In this case, this element is mentioned by all subjects but S3, though it is not possible to be totally sure about the specific meaning of this answer, since correct style is mentioned as an independent quality criterion by S1. Another element mentioned as specific for transcreation projects in previous questions is rationale (found in answers by S1 and S2). The rest of the criteria mentioned seems to be more general and may belong to a more linguistic sphere.

A specific mention to creativity must be made here. While transcreation is generally perceived as a creative practice, some of the answers point to the idea that a transcreation should not be considered as better because of a higher degree of creativity (subjects S2, S3), but because of a closer adherence to the guidelines provided by the client.

Table 8. Answers to question Q6

	Subject 1 (S1)	Subject 2 (S2)	Subject 3 (S3)	Subject 4 (S4)
Q6. Do you consider that it is possible to create a standardized method to assess quality in transcreation projects?	- No	- Possible, but hard	- Possible, difficult	- Good to raise the alarm (in non-transcreation issues)

The answers for question Q6 are detailed in Table 8.

All answers are clearly aligned in this case. A standardized method to assess transcreation jobs seems to be a hard endeavor to achieve. Some participants (S1) even consider that it is not possible. This general pessimism is probably linked to the idea that creative work cannot be evaluated or assessed, though, as we described in section 2.4, this is not totally correct. Likewise, the agreement found in the answers to Q5 is promising in this sense.

The answers for question Q7 are detailed in Table 9.

Table 9. Answers to question Q7

	Subject 1 (S1)	Subject 2 (S2)	Subject 3 (S3)	Subject 4 (S4)
Q7. What would be the main skills required to provide top quality transcreations?	- Copywriting skills - Language skills - Translation skills - Cultural sensitivity - Local market understanding	- Language skills - Copywriting skills - Market knowledge - Good time management	- Ability to talk in different voices - Good communication skills - Some degree of "craziness"/creativity	- Linguistic skills - Market knowledge - Creative writing

In this case, some degree of language skills seems to be the most common answer (which seems to be an obvious one, given the nature of the job). Market knowledge takes the second position, something important if we wake into account that the communication performed in transcreation job has a commercial and selling *skopos*. Copywriting takes the third place in term of presence. Finally, it is curious to see that creativity does not seem to take a high position in this list and this again may be linked to a fact that has been mentioned in previous answers: in transcreation, creativity seems to be not a goal, but the means to an end.

CONCLUSION

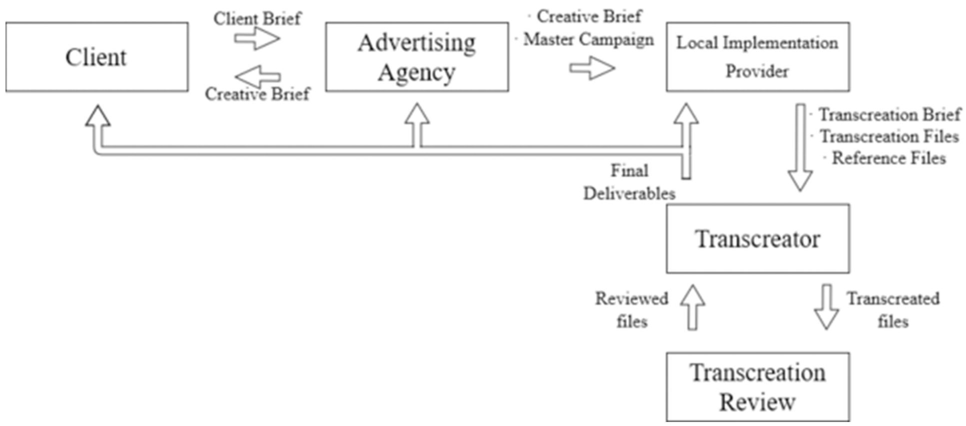
Before providing any conclusions, it must be mentioned again that any of the following remarks must be considered from a descriptive point of view. As detailed in section 3, our methodology does not allow to provide universal findings and the representativeness of the following proposals should always be read on this line.

Two general objectives have been described above for this proposal. Concerning the first one, we may claim at this point that transcreation projects and jobs seems to have a specific workflow, which is a differentiated one from others followed in the language services market, as well as in the advertising/marketing/communication industries. This workflow serves the needs of the agents involved in the process, which are different to those found in said industries.

Taking into account the previous theoretical review and our findings, a graphical description for this workflow is provided in Figure 2.

The full description of the represented workflow would be the following. First of all, a Client contacts an Advertising Agency to promote a product or service (the denomination 'Advertising Agency' at this stage may refer to a company of this type, but also to a marketing agency, communication agency or a

Figure 2. Proposed description for a workflow in transcreation projects



similar entity that provides similar services). The requirement and needs of the Client are compiled in the Client Brief. After the review of this document, the Advertising Agency provides in return a Creative Brief with its proposal for a campaign. If this is accepted by the Client, the Advertising Agency creates a Master Campaign.

If the product or service is going to be promoted in an international market, then the Master Campaign and the Creative Brief are sent to a Local Implementation Provider (LIP). This is the term we propose to denominate different players that may enter at this point of the process, such as language services providers, transcreation agencies, marketing implementation agencies, etc. This denomination is proposed since the typology of entities that can performed this task is broad and varied. In any case, their role is to be sure that the campaign is adapted to the local markets following the guidelines and objectives detailed at the Creative Brief.

The LIP creates a Transcreation Brief based on the Creative Brief and sends this document, together with the files to be transcreated and any reference materials, to the Transcreator. This provides a set of transcreated files (that might or might not be reviewed by a third party or by the LIP). Once a set of Final

Table 10. Proposed quality model for transcreation projects

Quality Criteria	YES	NO	Comments
Brief has been followed			
Right tone of voice has been used			
Product/service values are reflected in the proposed transcreation			
Other guidelines have been followed (e.g., character restriction)			
Proper backtranslation and rationale have been provided			
No linguistic issues have been found (e.g., spelling, grammar, etc.)			

Deliverables is ready, this is sent to the LIP, the Advertising Agency and/or the Client. The presence of this last long arrow shows that this is a flexible process with several stakeholders involved.

Concerning the second objective described above, it is indeed quite difficult and well beyond the means of this work to provide a detailed quality assessment model for transcreation jobs. Therefore, in this sense we propose a general yes/no checklist, that might offer some guidance to both transcreation professionals and academics interested in further researching this topic. This can be found in table 10.

While basic, this proposed model allows further development, personalization according to the specific needs of each case and even connection with existing models. For example, the last category related to linguistic issues can be easily connected to a classic scorecard model (for example, the one used in LISA QA model). Likewise, each one of these criteria could be broken down in several subcategories. Finally, the YES/NO columns could be even substituted for an *ad hoc* numeric model, based on a series of pre-agreed criteria, that would allow for a more detailed and less categoric assessment.

FUTURE RESEARCH DIRECTIONS

As shown above, quality and workflows in transcreation projects are two topics that require further research. There are several research lines that can be followed from this point:

- An interview-based study, similar to this proposal, but with a broader and more representative sample.
- A social study based on a general survey oriented to transcreator. This instrument would be based on the present proposal (or in other interview-based ones, to provide triangulation of the data obtained).
- In situ studies in advertising, marketing, communication, translation and transcreation companies, in order to check if the reality described in the proposed workflow gets close to what really happens in professional contexts.
- Application of the proposed transcreation quality model (in its present form or modified) in professional or training contexts, in order to check its validity and usefulness to assess this type of projects.

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Chapter 11
Seeking Spaces of Convergence:
Cognitive Web Accessibility and Easy-to-Read Tools as a New Market Niche in Spain

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ABSTRACT

This chapter presents a state-of-the-art analysis of cognitive accessibility in Spain and its convergence with Translation Studies, as well as a descriptive approach to the level of web accessibility of Spanish institutions and corporations. Since this chapter aims at describing the specific case of Spain in the aforementioned fields, a vast amount of the references made emerge from research studies conducted in this country. The chapter is therefore divided into three main sections: firstly, a road map of the convergence of cognitive accessibility and the fields of Applied Linguistics (AL), Pragmatics, and Translation Studies (TS) from the perspective of a number of Spanish researchers; secondly, a description of the current situation in Spain in terms of laws, decrees, and associations using easy-to-read tools as one of the main instruments of cognitive accessibility; and thirdly, a descriptive approach to the level of web accessibility in Spanish institutions and corporations.

INTRODUCTION

Faced with a situation in which Applied Linguistics (AL) seems to have no clear-cut boundaries, some decades ago researchers like Brumfit already described this area of study as "the theoretical and empirical investigation of real-world problems in which language is a central issue" (Brumfit, 1995: 27).

The term *Applied Linguistics* dates back to 1957, when the first program of that name was founded at the University of Edinburgh, leading in the 1970s to the *Edinburgh Course in Applied Linguistics* (Allen & Corder, 1975).

The Spanish researcher Díaz Fouces explains that the origins of AL coincide with the period of time just after the Second World War, when new international institutions with numerous working languages were proliferating. Díaz Fouces also points out that "in those years the term *applied linguistics* became

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identified with *language didactics*. Only later was it extended to refer to other areas like language planning, clinical linguistics, computational linguistics, etc." (Díaz Fouces, 2004: online).[1]

Díaz Fouces explores different views on the possible interrelationship between AL and Translation Studies (TS), echoing several authors' vindication of an independent charter for research into translation and interpreting activities (Rabadán & Fernández, 1996: 106-108; Hurtado Albir, 1996: 156-157; Baker & Pérez-González, 2011: 39-52) and also supporting the existence of a space for interdisciplinary convergence as defended by other researchers such as García Izquierdo (1997).

After compiling and comparing the different approaches used in AL and TS research, this author offers his own view of the relationship between Linguistics as applied to translating activity (LAT) and Translation Studies:

We understand Linguistics Applied to Translation to mean the set of resources (models, methods and instruments) provided by the different language disciplines that are used in any of the lines of research carried out in Translation Studies, that are in any way useful in professional language mediation practice, or that are designed ad hoc for any of those purposes (Díaz Fouces, 2004: online).[2]

For Díaz Fouces, therefore, LAT serves both as a reflexive tool and as an instrument of practical use in the context of translating activity. This view can be considered a legacy of the theory Ricardo Muñoz Martin describes in his work *Lingüística para traducir*, a theory very graphically illustrated in the following example:

The business of those who translate or interpret is communication by means of languages. As in the case of dentists, physiotherapists, and pharmacologists, who learn only those aspects of medicine that allow them to engage more efficiently in their professions, language mediators need to start by learning only those aspects of linguistics that will most help them to begin or improve their work. Otherwise, we might find ourselves not in the doctor's shoes but in the patient's: knowing where it hurts, but nothing else (Muñoz Martín, 1995: 6).[3]

According to Muñoz Martin's line of argument, LAT becomes a kind of theoretical tool with which budding translators should be familiar as a basis for justifying their own decisions in their professional activity (the theoretical-practical approach). The objective of translator training is thus not primarily to reach the highest possible level of expertise in Linguistics (either general or applied), but to absorb enough theoretical knowledge of Linguistics to be able rationally to put it into practice and, thereby, perform the translating task efficiently.

One of the mainstays of this theoretical, reflexive-practical concept of Linguistics applied to Translation is the pragmatic approach, in which there is a direct link between the contextual value of language use and the parameters that influence the translation process.

OBJECTIVES

Following the premises described in the introduction section and on the search for a bottom-up linguistic, translation-related, inclusive and interdisciplinary perspective, the objectives of this chapter are as follows:

- To describe the interaction between AL and Pragmatics in order to establish a connection between these two fields according to the main pragmatic theories.
- To study the convergence between the principles of Pragmatics and the main concepts in TS.
- To analyze the concept of "cognitive accessibility" and relate it to the fields of Pragmatics and TS.
- To describe easy-to-read tools as an aspect of special relevance for translators.
- To describe the state-of-the-art situation of cognitive accessibility and easy-to-read tools in the specific case of Spain from an associative, legislative and training perspective in order to analyze the relevance of this market niche for current and future generations of translators.
- To briefly describe the level of cognitive accessibility in Spanish corporate websites in order to present this field as a very interesting market niche.

To summarize, the analysis described in this chapter can be regarded as a bottom-up study since the starting point is a pragmatic and translation-based perspective. Starting from this generic perspective, this chapter aims at establishing a connection between the principles of Pragmatics and TS and the specific field of cognitive accessibility. Taking also into account the current demand for more accessible websites within the Spanish market as a case study described in this chapter, this kind of bottom-up analysis is of special relevance in order to lay the foundations for further research. In fact, it is important to note that the analysis displayed here is just the beginning of a more complex research conducted by the author of this chapter.

INTERCONNECTION BETWEEN APPLIED LINGUISTICS AND PRAGMATICS: AN INTERDISCIPLINARY OVERVIEW AND ITS SIGNIFICANCE IN TRANSLATION PROCESS

As mentioned in the previous sections, Pragmatics is the branch of Linguistics which studies how context influences the way meanings are interpreted. Two pragmatic theories in particular shaped much of the linguistic history of the 20th century. They were Austin's speech act theory (1962) and Grice's cooperative principle (1989).

The speech act theory of philosopher J.L. Austin (later revised by his disciple John Searle) is based on the observation that the purpose of communication is not only to pass on information about something, but also to perform a specific act.

In Austin's theory, the *speech acts* which are aimed at achieving a given objective and which constitute the whole basis of the theory are subdivided into three levels: locutionary acts (the actual utterance of the message), illocutionary acts (the real meaning or intention behind the message) and perlocutionary acts (the intended effect on the listener).

The *cooperative principle*, or principle of cooperation, developed by Paul Grice (another philosopher) is based on the premise that the speaker and the listener in a conversation are united in a desire to cooperate, so that communication may take place and allow them to receive the expected benefits of their respective contributions. Grice reflects this principle in the concept of *maxims*, that is to say, the highest levels to which speakers aspire in conversational communication. But although the *maxim* could be defined as the highest possible point that can be attained by the contributions made in a communication, speakers and listeners in real communicative exchanges do not usually reach that maximum level, either deliberately or due to circumstances beyond their control.

Grice sums up those highest levels of aspiration in the following *maxims of conversation*: the maxim of quantity (the amount of information that should be offered), the maxim of quality (the degree of veracity in the contribution to the conversation), the maxim of relation or relevance (the degree of relevance of the message uttered to the conversation being conducted), and the maxim of manner (the level of clarity, obscurity or ambiguity in the contribution to the conversation).

In situations of communication, speakers and listeners are somehow aware of these maxims, although very often they deliberately flout them, for example to express irony, sarcasm, or humor. When the maxims are violated, when there is no compliance with their governing precepts, the result is what are known as *conversational implicatures*: interpretative mechanisms in which something is implied that is different from (or even the very opposite to) what was literally manifested in the communicative utterance.

Seeking out common ground between the theories of Austin and Grice, it is noticeable that illocutionary acts seem to concur perfectly with the concept of *implicature*, because if an illocutionary act is seen as a hidden or "real" message at a level beyond the mere phonetic and grammatical dimension of an utterance, it can be assumed that it violates at least one of Grice's maxims. In other words, the reality of the message the speaker wants to transmit is convergent with the sub-part of the illocutionary act, disguised behind a series of sounds and structures that are visible in the locutionary part of the speech act. When one or more conversational maxims are violated and implicature occurs, the listener is moved to receive or sense a specific perlocutionary effect, once again bringing the two theories into convergence.

Pragmatic Theories and Their Convergence with the Basic Principles Addressed in Translation Studies

Translation Studies revolve around three key concepts: translation assignment, translation competence and translation process.

In her early studies, Christiane Nord defined *translation assignment* as the conditions under which a translation will perform a given function in the target culture (Nord, 1997: 59-60). She also said that the parameters to be specified in an ideal translation assignment should be the following: communicative purpose, receiver(s), time and place of the text's reception, form of transmission (oral or written) and the reason why the text was produced or received.

More recently, researchers like Parra Galiano have taken Nord's definition as a point of departure to further specify the features (both ideal and real) that make up a translation assignment:

[The translation assignment is the] set of explicit or implicit specifications which guides the work of both the translator and the reviser. These specifications generally refer to deadlines, requirements concerning the presentation of the target text (TT), users and the purpose of the translation. They may also include instructions regarding the use of specific terminology. […] Translation assignment specifications can be obtained in three ways: 1. Explicitly (on the customer's initiative, when they issue the work order and provide instructions either verbally or in writing); 2. Implicitly (instructions are not given expressly because they are evident or because they are already known from previous jobs) and 3. At the request of the translating entity (who takes the initiative to seek information about some specific aspect of the translation assignment) (Parra Galiano, 2005: 370).[4]

Following in the footsteps of Nord, Parra Galiano does not focus exclusively on delivery deadlines and the formal requirements for the target text (TT), but extends the scope of the translation assignment to include the users and the purpose of the translation, thus making her definition eminently pragmatic.

As stated earlier, another key concept in TS is that of *translation competence*. After reviewing all the different definitions that have been offered for this concept, Dorothy Kelly came to the conclusion that translation competence is the macro-competence that comprises the different capacities, skills, knowledge and even attitudes that professional translators possess and which are involved in translation as an expert activity (Kelly, 2002: 14).

For Kelly, this translation macro-competence is divided up into cultural, thematic, psychophysiological, instrumental/professional, communicative, and textual competences, with strategic competence being the common focal point for them all. That is to say, it is the decisions taken by the translator as part of his/her translating activity or translation procedure (in line with the explicit or implicit instructions in the translation assignment) that will determine all the other competences.

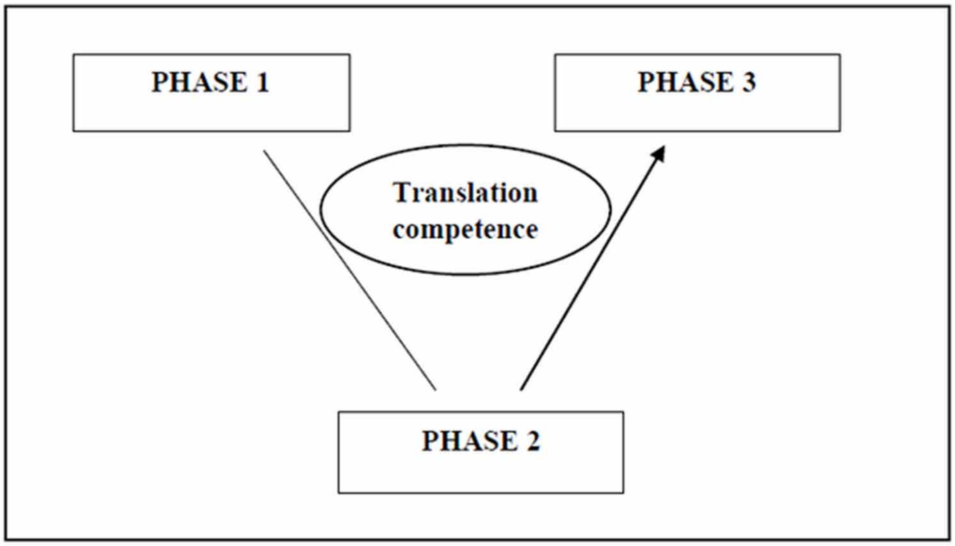
Another of the fundamental concepts on which TS are based is that of *translation process*. The Spanish researcher Gil-Bardají defines this as "is all the procedural knowledge, conscious or unconscious, automatic or controlled, heuristic or algorithmic, that makes up the transfer process which takes place when we translate" (Gil-Bardají, 2009: 36).

To offer a distinctly synoptic, pedagogical approach, and following in Gil-Bardají's footsteps with regard to the concept of *translation process*, Ponce-Márquez (2018) has developed what is called the V-shape approach. In this approach, Ponce-Márquez defines the translation process as a big V-shaped funnel which acts as a road map to be followed by the translating entity and in which translation competence stands as a key concept. This V-shaped itinerary for the translation process is divided into the following phases:

- Phase 1, or the initial (descent) phase. Comprising an exhaustive analysis of the source text (ST), this phase represents the first leg of the journey towards the point of convergence at the bottom of the V. It also includes a detailed analysis of the (explicit or implicit) translation assignment, to make the translating entity aware of all the aspects that converge in the ST.
- Phase 2, or the intermediate phase. This is a phase of refinement (the bottom of the V coincides with the output point for the product poured into the funnel). In this phase, the translating entity strips the text of all additional elements (register, stylistic features, terminology, etc.) to extract the core message and the communicative purpose which must be transferred into their TT.
- Phase 3, or the final (ascent) phase. Once the core message has been extracted, the translating entity has to climb the other side of the V. That is to say, the translated text must be "raised" to the same linguistic-pragmatic level as the ST, including all the features corresponding to the linguistic-cultural system in which the translation is to be inserted (target culture or TC). This final phase includes the revision process, the aim being to ratify that all the previous phases have been correctly executed and the instructions contained in the translation assignment complied with.

With this theory, emphasis is therefore placed on the fact that translating activity is a discipline characterized by the need to analyze and connect, as if by an invisible thread (see Ponce-Márquez, 2007; Venuti 1995), two languages and cultures through one and the same text, in order to achieve the highest possible degree of acceptability by the receiver of the TT[5].

Figure 1. V-shape approach (Ponce-Márquez, 2018)



Taking this idea of the V-shape approach to translation process and linking it to the pragmatic theories described in the previous section, it is interesting to note that, during the initial phase (1), the exhaustive analysis of the ST carried out by the translating entity makes it possible to decipher the illocutionary acts and implicatures present in that ST, always in the light of the translation assignment governing the text.

In the ascent phase (Phase 3), as explained above, the translating entity must be sufficiently agile to be able to rewrap the previously refined message and present it in a form similar to that of the ST. In this final phase (3), the translating entity should focus on the illocutionary act and the corresponding implicatures, since the ultimate objective of all TTs is to produce the same perlocutionary effect on the end receivers as the ST produces on the original readers.

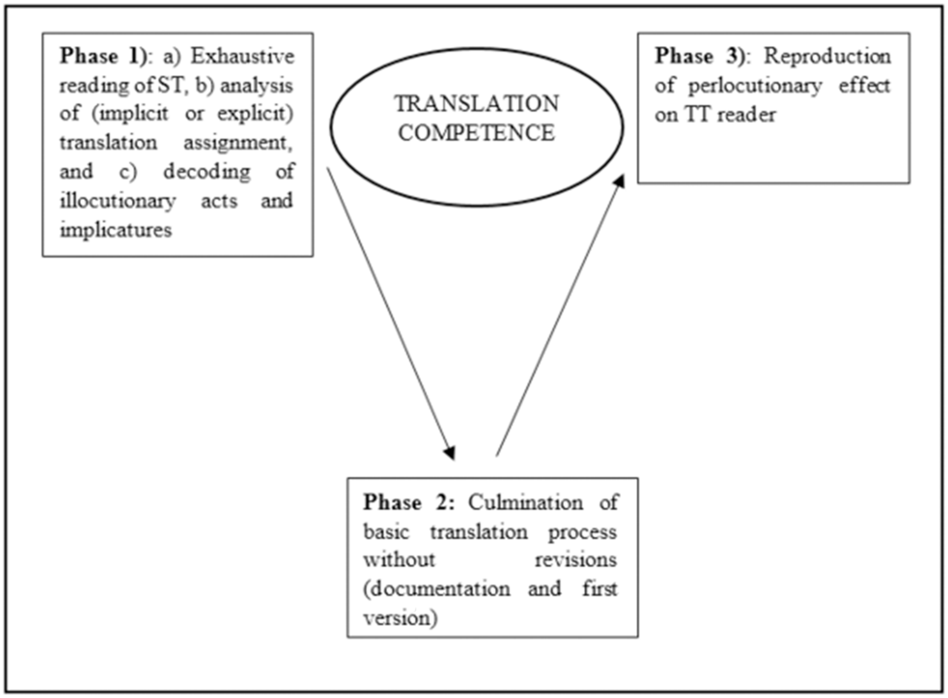
It can be seen, then, that the pragmatic theories of Austin and Grice can be brought very synoptically into play in the V-shape approach to translation process, and also linked up with the core concepts in TS (translation assignment, translation competence and translation process).

Having established the link between the core concepts of Translation Studies and the basic principles of Pragmatics, a study will now be presented into the macrothematic issue of accessibility, with special emphasis on the concepts of *cognitive accessibility* and *easy-to-read tools*. It is an analysis which will ultimately relate these concepts – concepts that have to date aroused insufficient interest among researchers in the field of TS – to the translation process and the linguistic-pragmatic theories mentioned earlier, thereby making this project's object of study a linguistic, translation-related, inclusive, interdisciplinary body.

FROM TRANSLATION TO ACCESSIBILITY STUDIES: THE CASE OF SPAIN

The Office for Civil Rights (OCR) at the U.S. Department of Education defines accessibility as meaning "when a person with a disability is afforded the opportunity to acquire the same information, engage in

Figure 2. The link between pragmatic theories and the core concepts in TS



the same interactions, and enjoy the same services as a person without a disability in an equally integrated and equally effective manner, with substantially equivalent ease of use." (Curry, 2018)

BBC explains what accessibility means in a very easy way: "accessibility is the word used to describe whether a product (for example, a website, mobile site, digital TV interface or application) can be used by people of all abilities and disabilities" (BBC, 2014).

In the European context, the European Accessibility Act (European Commission, 2019) is a directive that aims to improve the functioning of the internal market for accessible products and services, by removing barriers created by divergent rules in Member States.

Since this chapter focuses on the situation in Spain, one possible definition of the term *accessibility* we should pay attention to is the one given on the web site of Spain's Accessibility Observatory (*Observatorio de la Accesibilidad*: online): "the property of easy access which allows anyone, including people with limited communicative or cognitive mobility, to access a place, object or service."[6]

In recent years, there has been a change of conceptual paradigm from the more general notion of removing barriers to the macro-concept of *accessibility*. Actually, more traditional options like "removing architectural barriers" are now being replaced on the linguistic scene by other concepts better suited to the current legal context. These, as listed by the abovementioned Observatory, include:

Architectural accessibility (referring to public and private buildings), urban accessibility (referring to the urban or physical environment), transport accessibility (referring to public means of transport), communicative accessibility (referring to individual or collective information), and electronic accessibility *(ease of access to ICTs and internet content for all disabled, elderly or circumstantially underprivileged people) (Observatorio de la Accesibilidad: online).*[7]

As Luis Cayo Perez Bueno, chairperson of CERMI (*Comité Español de Representantes de Personas con Discapacidad*, Spanish Committee of Disabled People's Representatives) explains, the concept of *accessibility* falls within the rights of disabled people:

Having moved on from dated concepts like the removal of barriers, adaptation, habilitation, etc., accessibility is now understood as a right, or, more specifically, a prerequisite for the exercise of a person's rights, something logically correlated to the consideration that a lack of accessibility to spaces, products and services open to the public is a form of discrimination against disabled people (Pérez Bueno, 2011: online).[8]

At this point, it is interesting to note that in 2006 the UN approved the creation of the Convention on the Rights of Persons with Disabilities (CRPD) as an international instrument for the protection of these people's rights. Spain signed and ratified the Convention, making the presuppositions on which it is based rightly applicable in this country.

Article 9 of the Convention states the following regarding the issue of accessibility:

Accessibility: To enable persons with disabilities to live independently and participate fully in all aspects of life, States Parties shall take appropriate measures to ensure to persons with disabilities access, on an equal basis with others, to the physical environment, to transportation, to information and communications, including information and communications technologies and systems, and to other facilities and services open or provided to the public, both in urban and in rural areas.

As can be seen, this covers all the variables found earlier in the aforementioned Accessibility Observatory definition (i.e., architectural, urban, transport, communicative and electronic accessibility).

We are therefore talking about universal accessibility, understood as "that condition which should be met in physical environments, processes, goods, products, services, objects or instruments, tools, and devices to make them understandable, usable and practical for everyone, ensuring safety and comfort in the most natural, autonomous manner possible" (*Observatorio de la Accesibilidad*: online).[9]

It can also be affirmed that the concept of "universal accessibility" is now no longer a beautiful but fleeting utopia on the drawing board, but has become an issue of legislative relevance at both national levels, thanks to Spain's Law of Equality, Non-Discrimination and Universal Accessibility (Liondau)[10] of 2003, and at international level, thanks to the measures implemented by the aforementioned Convention on the Rights of Persons with Disabilities.

Searching for a more specific definition, the term "cognitive accessibility" can be broadly described as the key characteristic of environments, products, services, devices and processes that are easy to understand. We are therefore looking at a right of people with functional diversity, as explained by FEVAS Plena Inclusión Euskadi (2018), an association of entities working for the rights of people with intellectual or developmental disabilities and their families. FEVAS very clearly describes these rights in the following terms: "When (disabled people) understand information and understand the world around them, they can give opinions, take decisions and participate in society. They can also relate to other people and control their own lives" (FEVAS: online).[11]

FEVAS has published a monograph entitled *Por el derecho a la accesibilidad cognitiva* ("For the Right to Cognitive Accessibility"), with a manifesto containing the following demands regarding cognitive accessibility:

1. Easy-to-understand information in easy-to-read format.
2. Easy-to-use technology.
3. Friendlier, easier-to-understand environments.
4. Accessible transport.
5. Attention to people's needs.
6. The training of different professionals in intellectual disabilities.
7. Sensitization of society.
8. Accessible people.
9. Working together to make life easier.
10. Changing the name of cognitive accessibility.

Two of the points included in this manifesto – points one and ten - are worthy of closer consideration. Right at the start, point one addresses the direct interrelationship between cognitive accessibility and easy-to-read tools. But point ten is also of interest for this paper because it raises a key terminological issue: the very name *cognitive accessibility* in itself seems somewhat unclear and, therefore, somewhat inaccessible. The FEVAS association therefore proposes looking into other possible nomenclatures.

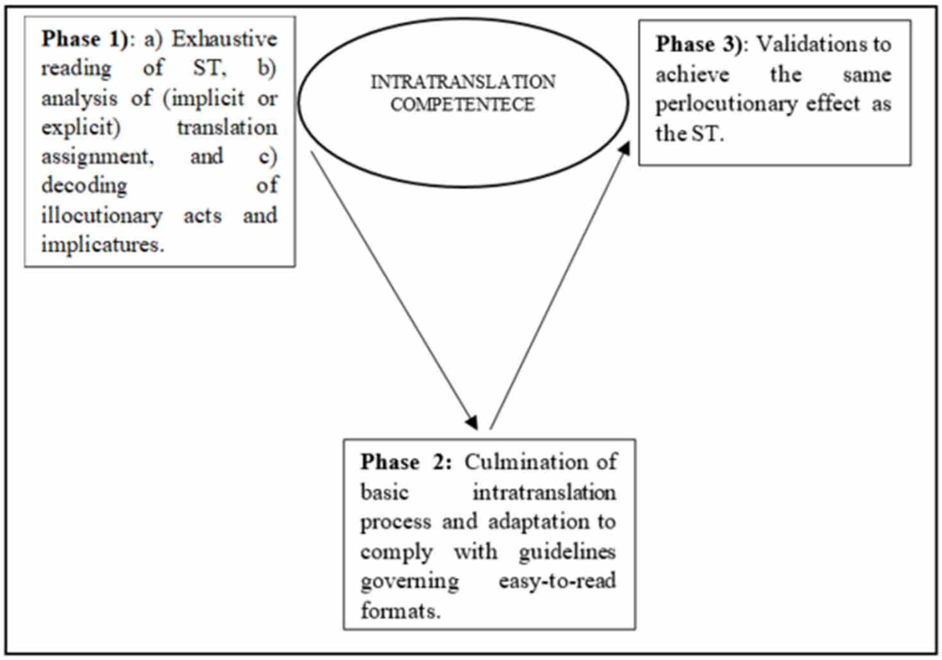
EASY-TO-READ TOOLS WITHIN THE FIELD OF COGNITIVE ACCESSIBILITY: A NEW LINGUISTIC-PRAGMATIC AND TRANSLATION-BASED MARKET NICHE

One of the main instruments used to improve the level of cognitive accessibility of any item is easy read or *easy-to-read tools*. Seeking for the spaces of convergence described in this chapter, it is important to note that the fields of Pragmatics and Translation Studies are very much related to easy-to-read tools insofar that the transfer of texts into an easy-to-read format can be considered a process of intratranslation, with the adaptation to easy-to-read format taking place within the same source language.

Easy-to-read format therefore involves a linguistic-pragmatic approach which coincides with phase 1 of the V-shape approach theory described earlier. That is to say, the person responsible for "translating" texts into the easy-to-read format has to analyze the ST in depth in order to extract the message hidden behind the words (illocutionary acts, implicatures and perlocutionary effects) and then adapt it to comply with the guidelines governing the creation of easy-to-read materials. This way, just as in a translation assignment the general instructions concerning the text to be translated are (explicitly or implicitly) indicated, a hypothetical assignment to transfer texts into an easy-to-read format explicitly includes the objective, namely to transfer[12] texts which will be suitable for use in communicative situations involving people who require cognitive accessibility.

It is in phase 2, as part of the culmination of the first (as yet unvalidated) version, that the text is adapted to meet easy-to-read guidelines, while validation – one of the most important steps in the process of intratranslation – takes place in phase 3. This validation phase involves the revision of the already intratranslated texts by a controlled group of cognitive accessibility users (see Plena Inclusión 2018). In other words, once the texts have been intratranslated. They need to be validated by actual users of

Figure 3. The link between the basic principles of Pragmatics and Translation Studies and the process of intratranslation in easy-to-read format



cognitive accessibility, a process comparable to the revision task in phase (3) of the V-shape approach to translation process. Once again, then, and as illustrated in Figure 4, a link can be seen between basic concepts in TS (translation competence[13], translation assignment and translation process) and the process of transferring texts to the easy-to-read format.

Considering also that those same texts intratranslated to the easy-to-read format may need to be translated in the same format into other languages and cultures, we could be talking about a transition from intratranslation to intertranslation. This would represent a great market niche both for translators just starting out on their careers and for already established professionals with training profiles related to cognitive accessibility and easy-to-read formats.

In this chapter we therefore argue in favor of collaborative action both at intratranslation level and in the transfer towards intertranslation. For intratranslation, the ideal working team would be multidisciplinary, made up of social workers (those who work in direct contact with users of cognitive accessibility), linguists, translators and translation theorists (with highly relevant linguistic-pragmatic competences). Validators would also be indispensable, as the ultimate guarantors of the quality of the intratranslations produced[14]. With regard to intertranslation, a translator trained in cognitive accessibility and easy-to-read tools would be the perfect person to undertake such a task. In either of the two scenarios envisaged here, the key cross-cutting issue is the need to train the people involved. To be able to have these multidisciplinary teams working together to maximize the benefits of easy-to-read guidelines as a tool of communication, it is crucial that training opportunities be provided for professionals in the fields mentioned above to allow them to produce intratranslations and their corresponding intertranslations with the highest possible levels of accuracy and quality.

As mentioned earlier, we currently stand at the threshold of a series of academic studies related to cognitive accessibility and easy-to-read tools, research which it is hoped will vindicate the importance of this market niche over the next few years and raise awareness of the pressing need to be able to train those interested in this field. It is an emerging market niche with enormous potential in terms of collaborative projects with entities working closely with users who demand more and better cognitive accessibility, and the training of all the professionals involved will constitute an indispensable piece in this multidisciplinary puzzle.

Easy-To-Read Tools in Spain in 2021

Once having found the spaces of convergence between TS, cognitive accessibility and easy read, it is important to pay attention to the definitions that some associations propose for "easy-to-read tools". In the Spanish context, a very clear definition of this term is provided by Plena Inclusión (online), an association that represents people with intellectual or developmental disabilities in Spain. In fact, this definition has already been presented in easy-to-read format[15]:

Easy-to-read tools is a way of writing

to allow people with comprehension difficulties

to understand what they are reading. […]

This blue logo is the easy-to-read logo.

If you see this logo on a web site, a document or a book,

it means that the content is in easy-to-read format

and is therefore easier to understand.

Easy-to-read tools can thus be considered a linguistic-pragmatic instrument for improving comprehension of all types of texts, within a need for cognitive accessibility.

In the Spanish context, one indispensable source in this area is Óscar García Muñoz's work entitled *Lectura fácil: Métodos de redacción y evaluación* ("Easy-to-read tools: Writing and Evaluation Methods") (2012), in which readers are taken on a linguistic and legislative journey through all the issues surrounding the easy-to-read tools and which culminates, in chapter 4, with a proposed method for writing texts in this format.

Taking into consideration García Muñoz's work, it is advisable to recall the guidelines covering content creation in easy-to-read format, and in particular the European rules governing such protocols.

A good introduction to the subject can be found in the document titled *Easy-to-read checklist. Checklist to make sure your document is easy to read* (Inclusion Europe, n.d.) published by Inclusion Europe, an European Association with 78 members in 39 European countries. In fact, in Spain the following three associations belong to this European initiative: Plena Inclusión**,** GADIR and Som Fundació Catalana Tutelar.

Figure 4. Easy-to-read logo.
Source: Plena Inclusión (2020)

In Spain, a booklet titled *Información para todos. Las reglas europeas para hacer información fácil de leer y comprender* ("Information for All: European Rules for Making Information Easy to Read and Understand") has been published by Inclusion Europe in collaboration with the Spanish Confederation of Organizations Supporting People with Intellectual Disabilities (2009) (FEAPS - *Confederación Española de Organizaciones en favor de las Personas con Discapacidad Intelectual*).

It might also be mentioned that only two years ago the Spanish Association for Standardization and Certification (AENOR, *Asociación Española de Normalización y Certificación*) published the world's first standard for easy-to-read texts, with the designation *Experimental Standard UNE 153101EX* (UNE, 2018) (*Easy to read. Guidelines and recommendations for the elaboration of documents*). This standard was created by Working Group CTN 153/GT1 Easy Reading, part of Technical Standardisation Committee 153 of the Spanish Association for Standardisation UNE. It was drafted by entities and experts from different disciplines, who unified criteria and recommendations resulting from their professional experience in each of their different areas of activity.

With regard to training, it is important to remember that in Spain only three postgraduate qualifications in accessibility are currently available, only two of which offer any content related to easy-to-read tools. One is the Master's Degree in Accessibility for Smart City[16], which is taught virtually at the University of Jaén and includes a sub-module on easy-to-read tools. Another online course is that offered by the Instituto de Estudios Lingüísticos y Traducción (ISTRAD) in Seville, leading to the qualification of "Expert in Accessibility to Communication and Cultural Content", in which easy-to-read content is addressed in Module II (Accessibility to Information and Communication)[17].

In view of this limited number of training opportunities in higher education, it is the abovementioned associations that provide numerous courses on easy-to-read tools on their own web sites, with the objective of furthering knowledge of this format and training professionals from the world of communication, educators, trainers, linguists, etc.

Following this brief overview of the associative, legislative and training context, it is important to emphasize that all knowledge about easy-to-read tools as a linguistic-pragmatic instrument within the broader framework of cognitive accessibility is relatively recent, and very little academic research (if any at all) has yet been carried out in this area[18]. This chapter therefore serves as a first academic, investigative attempt to chart the convergence of the concepts of *cognitive accessibility* and *easy-to-read tools* with the precepts of linguistic pragmatics and translation theory, as will be explained in the next section, as well as to describe the present situation in Spain regarding these concepts.

COGNITIVE WEB ACCESSIBILITY IN SPANISH INSTITUTIONS AND CORPORATIONS: SEEKING A SPACE OF CONVERGENGE BETWEEN THEORETICAL PRINCIPLES AND A REAL MARKET DEMAND

After having charted a complete road map for establishing a direct link between TS and the world of accessibility in general and cognitive accessibility in particular, in this section we briefly analyze the legal and real-life situation regarding web accessibility in Spain (Medina Reguera & Ramírez Delgado, 2015, 2019), both in institutions and in the business sector.

Without delving more deeply into the issue of cognitive accessibility, we believe that this *sui generis* analysis can help us understand what still needs to be done to fully implement accessibility standards in Spain's emerging web scenario. Taken together with the theoretical study proposed in previous sections, it will also pave the way for subsequent research aimed specifically at further exploring the cognitive accessibility of web content posted by public institutions and private companies in Spain.

The earliest legislative attempts to regulate web accessibility in Spain date back to 2002. *Law 34/2002, of 11 July, on Information Society Services and Electronic Commerce* (2002) promulgated that all public administration web sites should be fully compliant with the corresponding accessibility requirements by 31 December 2005. The problem with this law was that the requirements it established were so vaguely defined that entities ended up not fulfilling them.

Five years later, *Law 11/2007, of 22 June, on Citizens' Electronic Access to Public Services* (2007) set forth the first clear, concise guidelines to be followed to maximize accessibility on public administration web sites. This law was one of Spain's earliest pieces of legislation to reference standard *UNE 139803: 2004: Computer applications for people with disabilities. Web content accessibility requirements,* which was in turn based on the Web Content Accessibility Guidelines 1.0 (WCAG 1.0) initiative[19].

European regulations have evolved over the years. The standard cited above was updated to *UNE 139803:2012: Web content accessibility requirements* (UNE, 2012), based on the WCAG 2.0 initiative. There then followed several more updates and adaptations to European legislation, culminating in the publication of *UNE-EN 301549:2019: Accessibility requirements for ICT products and services* (UNE, 2019), a standard based on the guidelines set out in WCAG 2.1 (W3C, 2018).

A more recent piece of Spanish legislation is *Royal Decree (R.D.) 1112/2018, of 7 September, on the Accessibility of Public Sector Websites and Mobile Applications*, which represents a step forward towards the full implementation of the latest accessibility standards in public administrations.

One key initiative in this scenario was the creation of the so-called Web Accessibility Observatory (PAe - Accessibility Observatory, 2017), a government-controlled instrument for helping public administrations to comply with web accessibility requirements. On the PAe web page (the Spanish Government's electronic administration portal), the Observatory is described as follows:

The Accessibility Observatory is an initiative of the Ministry of Economic Affairs and Digital Transformation that aims to help improve the accessibility level of the portals of the Spanish Public Administrations in all levels (General State Administration, Regional Governments and Local Governments).

Although the best possible scenario is still a long way off, it is nevertheless true that some public institutions are beginning to show signs of a willingness to showcase their attempts to make their web content more accessible. This can be seen, for example, in the Provincial Government of Cádiz (La Voz de Cádiz, 2015) and the University of Granada (Universidad de Granada, 2014).

In the private sector, companies like Nestlé (2010) and Ferrovial (PR Noticias, 2020) also publicize their high levels of web accessibility as a means of projecting an image of themselves among their consumers and customers as entities which not only comply with current legislation but also strive to make the content of their web sites accessible to all of their users.

This imperious 21st century need for society to provide web products with the highest possible level of accessibility for all users has also aroused interest in the academic world. At the University of Huelva (UHU), for example, research has been carried out to determine the accessibility levels of content posted on different corporate web sites associated with Spain's banking sector (Infonuba, 2016).

With regard to research into cognitive web accessibility, it is important to take into account associations which are active in this field. One such association, Plena Inclusión (2019), has produced a comprehensive guide on how to evaluate the cognitive accessibility of web sites and apps. The door, then, is now open to future research. Guided both by current regulations and by the recommendations of user associations vindicating greater accessibility in the day-to-day lives of their members, this will hopefully give us a deeper insight into the cognitive accessibility status of web sites in Spain, both in the public administrations and in the different business sectors.

CONCLUSION

In the light of all the above, it can be said that in order to conceptualize accessibility and start considering it a subject worthy of serious scientific study, it is necessary to endow it with a solid basis for research.

Here, the university plays a very important role, because addressing this subject in an academic context, as an object either of teaching or of research, means drawing attention to the issue. There is also a motivation to make accessibility a concept that is increasingly more tangible in society. The university of the 21st century should not ignore any opportunity to discover the market niches that emerge as society evolves, but should adapt to that evolution and serve as the transmitter of the knowledge required to respond to society's needs.

Universal accessibility, although adequately described at the corresponding legislative levels, seems in some cases still to be a utopia. But easy-to-read tools, as an instrument of cognitive accessibility, represent a distinctly multidisciplinary vehicle through which to put much of that yearned for universal accessibility into practice. With appropriate training, social workers, linguists, translators, and validators would be in a position not only to break into a new labour market, but also to collaborate in bringing about a more inclusive world.

Furthermore, research in universities (the work being done by some researchers at the Pablo de Olavide University such as Medina Reguera, Ramírez Delgado or Ponce-Márquez) aims to address this issue from a holistic theoretical-practical perspective, resulting in the highest possible levels of visibility, resource assignment and methodological-technical innovation.

In short, this chapter argues in favour of a collaborative framework in which the validation processes for intratranslations into easy-to-read formats, given their convergence with basic principles in Translation Studies, can be improved and research into an emerging market niche boosted as a means of working towards a more inclusive world.

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KEY TERMS AND DEFINITIONS

Cognitive Accessibility: Considerations for people with cognition and learning disabilities.

Easy-to-Read Tools: Instruments and materials used for people with various levels of reading disabilities.

Inclusion: Practice or policy of providing equal access to opportunities and resources for people who might be otherwise be excluded.

Intertranslation: In this contribution, to translate from a source language into a target language using easy-to-read tools.

Intratranslation: In this contribution, to translate within the same source language from a standard source text to a target text in the same language using easy-to-read tools.

V-Shape Approach: Funnel model developed by Ponce-Márquez to explain the different phases included in the translation process**.**

Web Accessibility: Process by which websites, tools, and technologies are designed and developed so that people with disabilities can use them.

ENDNOTES

1. Original citation reads as follows: "El rótulo *Lingüística Aplicada* quedó identificado en esos años con la *Didáctica de las lenguas*. Sólo después se ampliaría a otras áreas, como la Planificación Lingüística, la Lingüística Clínica, la Lingüística Computacional, etc."
2. Original citation reads as follows: "Entendemos por *Lingüística Aplicada a la Traducción* el conjunto de recursos (modelos, métodos e instrumentos) proporcionados por las diferentes disciplinas lingüísticas (aplicadas o no) que son utilizados por alguna de las orientaciones de los Estudios de Traducción, que presentan alguna utilidad para el ejercicio profesional de la mediación lingüística, o que son diseñados *ad hoc* para alguno de esos propósitos (Díaz Fouces, 2004: online)."
3. Original citation reads as follows: "El asunto de quienes traducen o interpretan es la comunicación mediante lenguas. Como en el caso de dentistas, fisioterapeutas y farmacéuticos, que aprenden tan sólo aquellos aspectos de la medicina que permiten ejercer mejor sus profesiones, los mediadores lingüísticos necesitan comenzar por aprender aquellos aspectos de la lingüística que les ayudan más a comenzar o mejorar su labor. De lo contrario, nos podemos encontrar no en la situación del médico, sino en la del paciente: sabemos dónde nos duele, pero nada más (Muñoz Martín, 1995: 6)."

[4] Original citation reads as follows: "[El encargo de traducción es el] conjunto de especificaciones, explícitas o implícitas, que guía tanto el trabajo del traductor como el del revisor. Generalmente, estas especificaciones se refieren a los plazos y a los requisitos relativos a la presentación del TL, así como a los usuarios y a la finalidad de la traducción. También pueden incluir instrucciones relativas al uso de una determinada terminología. […] Las especificaciones del encargo de traducción se pueden obtener de tres formas: 1. Explícita (por iniciativa del cliente al dar la orden de trabajo y proporcionar las instrucciones por escrito o verbalmente); 2. Implícita (las instrucciones no se indican de manera expresa, porque ya se conocen, debido a trabajos previos similares, o porque son evidentes) y 3. A petición del ente traductor (tomará la iniciativa de obtener información sobre algún aspecto concreto del encargo de traducción) (Parra Galiano, 2005: 370)."

[5] This chapter therefore follows in the footsteps of Toury (1995), with his concept of *acceptability* based on a maximum degree of orientation towards the target culture or, in the author's own words, adherence to the "target pole".

[6] Original citation reads as follows: "La cualidad de fácil acceso para que cualquier persona, incluso aquellas que tengan limitaciones en la movilidad, en la comunicación o el entendimiento, pueda llegar a un lugar, objeto o servicio".

[7] Original citation reads as follows: "Accesibilidad arquitectónica (referida a edificios públicos y privados), accesibilidad urbanística (referida al medio urbano o físico), accesibilidad en el transporte (referida a los medios de transporte públicos), accesibilidad en la comunicación (referida a la información individual y colectiva) o accesibilidad electrónica (facilidad de acceso a las TIC y a contenidos en Internet, para cualquier persona sea con discapacidad, de edad avanzada o por privación circunstancial) (*Observatorio de la Accesibilidad*: online)."

[8] Original citation reads as follows: "Superados conceptos anticuados como el de eliminación de barreras, adaptación, acondicionamiento, etc., la accesibilidad se entiende como derecho, más exactamente, como presupuesto necesario para el ejercicio pleno de derechos, que tiene como correlato lógico la consideración de la falta de accesibilidad de los entornos, productos y servicios a disposición del público como una discriminación contra las personas con discapacidad (Pérez Bueno, 2011: online)."

[9] Original citation reads as follows: "Aquella condición que deben cumplir los entornos, procesos, bienes, productos y servicios, así como los objetos o instrumentos, herramientas y dispositivos, para ser comprensibles, utilizables y practicables por todas las personas en condiciones de seguridad, comodidad y de la forma más autónoma y natural posible (*Observatorio de la Accesibilidad*: en línea)."

[10] A far cry from the *Law of Social Integration for the Handicapped*, better known as the *LISMI*, of 1982, the very name of which illustrates how old-fashioned 1980s terminology was.

[11] Original citation reads as follows: "Cuando (las personas con discapacidad) entienden la información y el mundo que les rodea pueden opinar, tomar decisiones y participar en la sociedad. También relacionarse con otras personas y controlar su vida (FEVAS: online)".

[12] Note that in this chapter the verb *transfer* is deliberately used to refer to the act of producing texts in easy-to-read format, in order specifically to distinguish this process from the generic concept of *translation process*. Notwithstanding, this chapter also defends the use of the concept of intratranslation, and so ultimately, we could perfectly well talk about "translating" documents into easy-to-read format.

[13] Note that in Figure 3 it was decided to use the term *intratranslation competence* in order to distinguish between translation competence in the translation process and the same competence in the intratranslation process. The difference between the two concepts lies in the fact that intratranslation takes place exclusively within one single source language.

[14] One interesting line of research would be to draw up a check-list style record of the validation process for these intratranslations, so that the corresponding studies could be undertaken in the field of translation theory to improve that process.

[15] Note that the definition as reproduced in this chapter retains exactly the same text layout and positioning of the easy-to-read icon as in the original definition. Original citation reads as follows: "La lectura fácil es una forma de escribir para que las personas con dificultades de comprensión puedan entender lo que leen. […] Este logo azul es el logo de la lectura fácil. Si ves este logo en una web, un documento o un libro quiere decir que está en lectura fácil y por eso es más fácil de entender."

[16] More information about this master's degree can be found online at: http://masteraccesibilidad.ujaen.es/

[17] Full information about this course is available online at: https://www.accesibilistrad.com/es/

[18] It might be noted that a doctoral thesis on the subject of easy read is currently being prepared at the Pablo de Olavide University under the supervision of Dr. Ana María Medina Reguera, a lecturer and researcher at that university's Faculty of Humanities.

[19] This was a World Wide Web Consortium (W3C) recommendation, made on 5 May 1999, explaining how web content can be made accessible to disabled people.

Section 5

Ethical Considerations on Corporate Communication

Chapter 12
Sexism and Advertising in the Global World:
A Theoretical Perspective

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ABSTRACT

The contribution that active sexism and daily sexist attitudes and behaviours provide to gender inequality happens in a large scale and seems to be a recurrent problem. The majority of authors' state that sexism can be divided in two categories: benevolent sexism and hostile sexism. One of the major problems is that the concept of sexism still faces, along with the concept of feminism, its society misunderstanding of the concepts. In an exploratory and conceptual perspective, this chapter presents contributions for communication, marketing, and advertising around the phenomenon of sexism. In a more practical contribution, the case study focuses on the motives why sexism in advertising doesn't seem to bother consumers when they decide to purchase an item. This chapter aims to present a critical review and theoretical contribution about sexism and advertising in the global world.

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INTRODUCTION

The contribution that active sexism and daily sexist attitudes and behaviors provide to gender inequality happens in a large scale and seems to be a recurrent problem (Dahl, 2015). The majority of authors' state that sexism can be divide in two categories: benevolent sexism and hostile sexism (Glick & Fiske, 2001). One of the major problems with this concept is that it still faces, along with the concept of feminism, society misunderstanding. There is not a fully notion of sexism understood by society and, sometimes, people do not take this matter seriously. The same happens with companies that do not perceive the subject as a relevant one. However, it is occurring a shift in the paradigm and nowadays society is worrying about topics that were not seen as relevant before. Advertising strategy is defined as an agglomeration of decisions, whose objective is the transformation into actions intending to reach the stipulated by the publicist when placing an advertisement in the possession of the consumers. The study of female stereotypes in the advertising industry began in the 1960s (Cunha & Sawerbronn, 2014). This was due to the birth of feminist movements. The feminist waves enabled women to search for the concept of equality, both in the world of work and at home. Female emancipation began to show strength in this decade. While some authors claim that advertising interferes with societies cultural and social beliefs, others indicate that advertising only reflects existing values (Schouten, 2011). In view of the above, this chapter intends to present some contributions about the theme of sexism and advertising and its implications for marketing. In an exploratory and conceptual perspective, this manuscript presents contributions for communication, marketing and advertising around the phenomenon of sexism. In a more practical contribution, the study focuses on the motives why sexism in advertising does not seem to bother consumers when they decide to purchase an item. This chapter aims to present a critical review and theoretical contribution about sexism and advertising in the global word.

BACKGROUND

Sex and Gender

Sex is defined as human organisms classified as women or men at birth and that live the rest of their lives according to that biological classification and without ambivalence (Spence & Helmreich, 1978; Phillips, 2005). It is from this belief that the concept of gender arises.

Gender is defined as the roles and expectations attributed to men and women in a given society (Korin, 2001). Despite starting from a biological construct, namely sex, gender turns out to be a social construct (Schouten, 2011). However, today is assumed that gender embraces both sexual – differences at the sexual level – and social constructs (Phillips, 2005).

It is important to emphasize that the individual does not always agree with this designation. Often the acceptance and understanding of the gender itself is not related to the feeling of non-belonging (as in the case of transsexuality), but to the dislike of the roles, rights and sexuality attributed (Spence & Helmreich, 1978). Let us analyze, as an example, the case of women. In view of the oppressive roles attributed to women and the absence of equal rights to males, women may be dissatisfied with their gender. The blame for discontent lies within the society in which individuals operate and the ideas propagated in relation to gender.

Ronai et. al (2014) argue that gender is an aspect of social organization and not a trait or variable. Thus, gender turns out to be another tool to form a social hierarchy. Spain (1992; p. 9) defines gender as "social and cultural distinctions that accompany the biological differences associated with sex". If biological differences are practically universal, the same cannot be said of cultural and social differences, which vary on a large scale, always dependent on the context (Schouten, 2011).

The roles assigned to a particular gender end up creating expectations. In view of the same expectations, there are appropriate behaviors for each gender. The same behavior can be positive for one gender and negative for the other. Gender roles turn out to be an extremely multidimensional concept and involved on a large scale with the social issue (Spence & Helmreich, 1978).

Gender is not the same as behavior. However, people tend to behave accordingly to the gender to which they belong and gender behavior roles seem to be attached to gender identity (Poeschl, et al., 2003)

Gender spaces are defined as areas where a given gender is considered integrated and appropriate, while the other is not. It thus consists of gender segregation. Gender spaces are a reality and we cannot avoid or forget them (Ronai et. al, 2014). There is a segregation between men and women, mainly in what concerns knowledge. Gender spaces distance women from the possibility that men have of acquiring an education, reinforcing their inferiority, a weapon of sexism (Spain, 1992).

Gender spaces were created by the differences in status between men and women, which have always existed. Institutionalized social segregation in society removes women from the condition to evolve educationally at the same pace as men (Spain, 1992).

There are institutions, such as academia and working places, which are inserted in certain spaces. These institutions often create gender barriers, placing the female and male figures in different spaces. Male spaces are more focused on education and monetary possession, while female spaces are mostly concentrated on domestic tasks and childcare (Schouten, 2011).

Prejudice Concept

Researches have tried to decipher what makes human beings discriminate and stereotype their peers for years. If the investigation initially focused on the individual as one and on a cognitive level, at the end of the 20th century, the individual started to be analyzed as part of a group.

In the 1950s, Allport (1954) defined prejudice as a hostile attitude towards someone that does not belong to the same social group. That is, prejudice exists because the person belongs to another social group, thus possessing the characteristics of the members inserted in it. The process of stereotyping individuals in social groups emerged as something natural for individuals. It is a cognitive analysis, more common at this time.

The mentioned author also distinguished preconceptions of prejudice, dividing discrimination into five distinct categories. In the first, the individual spoke negatively against the other, clearly explaining his/her prejudice through harmful words. Then, the author focused on the act of avoiding the individual based on prejudice and discrimination in social situations. The last two categories are the most extreme, relating to physical attacks and, finally, extermination. These categories were called the Allport Scale, thus becoming a way of measuring prejudice (Allport, 1954).

The Social Identity Theory emerged in the year 1970. This theory argues that each person shares feelings of identity with the members of the same group and value it, belittling the remaining individuals inserted in another social group. The individual feels part of a specific social group, falling into its several categories (Ashforth & Mael, 1984; Brewer & Kramer, 1985). People not only categorize themselves in certain social groups, but also allocate others to them, starting from their perspective and pre-concept (Tajfel & Turner, 2004).

Within the Social Identity Theory, there is interpersonal behavior – interactions between two or more individuals influenced by their interpersonal relationships and individual characteristics – and intergroup behavior – interactions between two or more individuals that are determined by their social groups. It is therefore important to distinguish personal identity from social identity, the latter deriving from the participation of a particular social group (Tajfel & Turner, 2004).

Tajfel (1981) states that prejudice cannot be understood only as something derived from individuality. Prejudice and its consequent stereotypes are related to social identity. The author inserts the Self-Categorization Theory, which explains the circumstances in which the person perceives himself and others as members of a social group (Tajfel, 1981). Others always influence individual prejudice.

When the individual lives in a social circle, he/she acts in accordance with his/her institutionalized rules. The relationship with others can be regularized and institutionalized before the social group; that way, the individual does not question his/her actions or blame himself/herself for acting according to expectations. The dominant groups defend their interests in masse and the beneficiaries focus on the subordination of those who do not belong to the group, persuading them to accept such a social relationship. Subordinates must admit the dominant supremacy for ideology to work according to expectations (Jackman, 1994).

Concept of Sexism

Dahl (2015) states that sexism presents itself as a complex concept. While some actors argue that it is based on actions of discrimination against a given sex, others claim that sexism comes from culture and ideology, based on stereotypes and the attribution of certain roles to different genders. Frye (1983) argues that sexism divides genders, based on sex, into dominators and subordinates. It also affirms that this happens in the economic and cultural structures of society, which use ideas and practices that create and reinforce what is supposed to be the behavior for each gender and rigid division patterns.

Frye (1983) also states that the way in which society identifies genders is vital for the perpetuation of sexism in different areas, since society uses different sexes to assign people to different groups with different characteristics or assumptions.

Sexism consists of assigning roles and privileges according to gender. In most cases, the roles and privileges assigned to the female figure are inferior compared to the male figure. Thus, sexism is as a tool for oppressing the female sex, contributing to gender inequality (Forbes et. al, 2007).

Sexism presents itself in the same way as a medium used in society to justify gender inequality, hence the high of the same level of danger. If the social norm sees the man as the center of the family, being this normality attributed to sexism, in the eyes of society the woman does not have the right to contest this and demand more. Sexism constitutes a tool for the perpetuation of gender inequality (Forbes et. al, 2007).

Laurence Thomas (1980) compares the concepts of sexism and racism. The author affirms that the difference does not fall only in the target of prejudice, as in sexism the victim is the woman and in racism people of another race. However, where does this comparison between racism and sexism comes from? Women and people from different races have always been considered socially inferior beings and targets of prejudice. Thomas (1980) states that the difference is found in both the morality and acceptance of situations. If a person suffers from racism, it is more likely that others, particularly males, feel sympathy for their discontent and suffering. If a woman suffers harassment, sympathy by males is not as likely.

Racism is judged as culturally and socially wrong; however, that does not happen with sexism. This situation makes racist attitudes easy to change than sexist ones. The biggest difference focuses on how society perceives and sees victims. In addition, there are differences in the way propagators see racism and sexism. While most men feel they have lost something in relation to the anti-sexism movement, this is not the case for people who do not suffer from racism.

Benevolent Sexism vs. Hostile Sexism

Sexism encompasses two components divided into benevolent sexism and hostile sexism. Glick and Fiske first introduced the concepts of benevolent sexism and hostile sexism, in 1996. Affirming that sexism is composed of the two dimensions, benevolent and hostile, the authors defend the existence of ambivalent sexism. That is, the authors argue that sexism is composed of both dimensions and they lead to gender inequality in different fields of society. (Glick & Fiske, 2001).

Hostile sexism, as the name implies, characterizes the female figure expressly in a negative way. Women are generally represented as incapable, weak, vulnerable and easy to manipulate (Plakoyiannaki et al., 2008). In this dimension, it is stated that the woman's desire is to gain control over the male figure, whether from feminist ideologies or taking advantage of her inherent sexuality (Glick & Fiske, 2001). Women who support feminist movements are often victims of hostile sexism, thus challenging male supremacy, competing for high positions in different jobs, often filled by male individuals, and willing to control men in a relationship (Glick & Fiske, 1996).

Benevolent sexism presents itself as a subtle way of making women inferior, representing them as in need of help and protection. This sexism encompasses women who are concerned with the appearance and stereotype of submissive women (Plakoyiannaki et al., 2008). In addition to the need of protection by the male figure, the woman is seen as a pure creature that must always be supported and adored by the man, in order to complement and fill his life (Glick & Fiske, 2001). The woman is seen as a wife who should be adored for serving marriage purposes, both as a housewife and as in sexual intercourse. It is also important to emphasize the importance of their reproductive function, meaning the generation of children in the relationship (Glick & Fiske, 1996).

The components of benevolent sexism and hostile sexism are simultaneously distinct and complementary. Both dimensions have three spheres that provide us with the main differences between them and, at the same time, how they complement each other. Glick and Fiske (1996) affirm that in hostile sexism we see a dominating or hostile paternalism, while there is a protective or benevolent paternalism in benevolent sexism. In both aspects, man appears as a father figure. If, in the first instance, the woman is seen as something that must be controlled and dominated, in protective paternalism we see the woman as a being who must be cared for and protected, just as with a child. In hostile sexism, heterosexual hostility is present; where the man retaliates when the woman calls into question his power and control. In the benevolent dimension, there is heterosexual intimacy, which is related to the desire to maintain intimate relationships with the female figure, deifying the same. Finally, in hostile sexism the man develops a competitive gender differentiation, where the male individual accentuates the differences between the sexes and competes with the woman, always favoring the figure of the man given his gender. Meanwhile, in benevolent sexism there is a complementary gender differentiation, where the male individual also accentuates the differences between the sexes, but presents the favored female figure, often due to the role of wife, mother and housewife.

However, although benevolent sexism may seem like it in the first impact, it is not presented to us positively, if we are going to carry out a more complex analysis, we quickly understand that benevolent sexism is based on the inferiority of women in relation to men (Glick & Fiske, 2001). Stereotypes continue to persist in this dimension, which leads to gender inequality, since the female figure is presented to us as weak and only suitable for some roles that are previously stereotyped according to gender (Sousa & Cardoso, 2020).

Benevolent sexism is likewise a form of prejudice. In addition, benevolent sexism can likewise contribute to the perpetuation of hostile sexism, since it always presents the man as the dominant figure. Now, if the man protects the woman in the dimension of benevolent sexism, he must be superior and stronger than her, rising the attitudes that characterize hostile sexism. The problems caused by benevolent sexism to women are numerous. If the female figure believes that the man is his provider and protector, her empowerment and a possible protest against male domination becomes extremely complicated. Therefore, gender inequality prevails (Glick & Fiske, 2001).

Benevolent sexism often camouflages itself in the culture in which society is inserted. Often normalized and perceived as chivalry, benevolent sexism turns out to be more difficult to combat than hostile and openly negative sexism (Glick & Fiske, 1996).

Jackman (1994) defends the concept of paternalism as the control of subordinates in a paternal way. It is morally accepted that the father dictates the rules and behaviors, in view of the child's interests, and the latter ends up accepting such authority. Paternalism is one of the concepts of interest for benevolent sexism. The man consequently legitimizes his superiority over the female figure based on paternalism. If a husband is supposed to act according to his wife's interests, there is no reason why she should not remain under his authority and domain.

In benevolent sexism, women are presented to us as creatures that must be protected by men, who have domestic qualities that are not inherent in men and that must satisfy their romantic needs. If on the one hand there seems to be some kind of positive tone, women are as stereotyped as they are in hostile sexism. The proof of this are the countless implications based on benevolent sexism, as several studies in the area have been proving. First, we see a perpetuation of stereotypes (Sousa & Cardoso, 2020). If the attitudes of benevolent sexism are seen in a good tone, the change will not happen. Thanks to benevolent sexism, we are also witnessing the inhibition of female aspirations (Geis et. al, 1984, Barreto et. al, 2010).

Existing paternalism suggests female inferiority (Dardenne et. al, 2007). In addition, female performance is affected by benevolent sexism to the extent that women question their abilities when exposed to benevolent sexist attitudes. That is, as this type of sexism is not so easy to detect, since it is a form of inferiority in disguise, it is easier to reach the female subconscious. In the study by Dardenne et. al (2007), attitudes based on this type of sexism caused anxiety, concern, doubt and decreased self-esteem in the participating women.

Negative reaction to victims of rape and sexual assault is likewise a problem with benevolent sexism. This type of sexism ends up idealizing a perfect female figure, who acts according to all the norms of society. Viki and Abrams (2002) carried out a study whose objective was to understand whether the reaction to rape of women with different behaviors differed. On the one hand, there was a woman, mother of three children and on the other a woman without children. Both invited an individual to their apartment and ended up being raped. The study concluded that the woman considered traditional in the eyes of benevolent sexism was more to blame than the other victim was. The authors also found that advocates of attitudes that fell within the context of benevolent sexism attributed more blame to the victim who was a mother.

Women detect comments more quickly based on hostile sexism than comments based on benevolent sexism. Based on this, women do not consider men who propagate comments based on benevolent sexism as unpleasant and prejudiced than those who act based on hostile sexism (Glick & Fiske, 1996).

Sexism and Gender Inequality

Sexual discrimination is present at the root of society, appearing in our daily lives (Ronai et. al, 2014). It is common for sexist discourse to arise when there is a purpose of control over the female figure, and this can happen in the public or private sphere (Ronai et. al, 2014).

In 1972, Spence and Helmreich developed the “Attitudes Towards Women Scale”, an innovation for the time in terms of measuring sexism. The main objective of the scale was to understand the attitudes of different people towards the roles attributed to the figure of women. That is, there were no right or wrong answers, but different opinions. The “Attitudes Towards Women Scale” has become a standard for measuring sexism in attitudes towards women’s rights and roles in society (Spence & Helmreich, 1972). In 1978, the authors developed a more summarized scale, which became a model in the study of sexism (Spence & Helmreich, 1978).

Sexism does not yet have the moral burden that man’s traditional role as provider of the home has always held. One of the main criticisms that can be made of this role is the perception that it is something natural for women to depend on men. From this idea, enshrined in society, innumerable sexist ideas will emerge, such as the assignment of household tasks to women and wages lower than men. Morally and socially perpetuated, sexism helps to perpetuate sexist concepts and attitudes towards the female figure (Thomas, 1980).

It is often complicated to accuse a sexist attitude because the traditional role of man, provider of family and home, is not morally criticized. The peers cannot judge the man who offers everything to his wife. In addition, since sexism is ignored, women that stay at home while men work and succeeds is not negatively evaluated (Thomas, 1980).

Women represent the largest number in the workforce in developed countries (Spence & Helmreich, 1978). However, discrimination at work is still a reality, whether in hiring women or in promoting them, and in the wage gap in relation to men. Women continue to be discouraged from pursuing prestigious and leadership positions (Spence & Helmreich, 1978; Davies et al., 2005; Rhodes et al., 2020).

One of the reasons that can lead to this inequality in the field of work is the institution of marriage, where man has always played the role of financial provider for the home. However, the institution of marriage has been losing strength, namely due to late marriages, the unwillingness of couples to marry and the growing female independence (Spence & Helmreich, 1978). Society itself perpetuates gender differences, leaving no room for women to develop in the same way as men (Spain, 1992).

Sexism is not just about the oppression that men exert over women (Ronai et. al, 2014). The authors consider that sexism is a topic that concerns society in general, and media increasingly exposes it as existing and common in aspects of our daily life. One of the biggest problems is that society does not fully understand the concept of sexism, together with that of feminism. There is a great lack of perception of what these concepts mean (Ronai et. al, 2014).

Communication and Advertising

The Industrial Revolution proved to be a major turning point for the evolution of advertising. With mass production, so-called economies of scale emerged, where products, manufactured in massive quantities, became cheaper and more accessible. Therefore, in view of the need to sell and the growing competition in practically all sectors, companies started different communication strategies for the masses. Allied to the periodicals, which saw advertising as a strong opportunity for enrichment, the ads began to circulate to the public. In addition, the care with advertisements has evolved, with the existence of professionals destined to create and follow their consequences (Santos, 2005).

In the post-World War I, it became public knowledge how important it was to bring the masses together, which largely led to consumer persuasion. At the end of the Second World War, advertising messages inundated media, including television. There was a lot of competition and the public was under the effect of submersion, with several advertising campaigns from different channels (Krugman, 1965).

The advertising industry benefits from technological development, having become sophisticated and elaborate. The advertiser has information that previously did not have about the consumer and more effective means to spread the message (Pollay, 2000).

The advertising strategy is defined as an agglomeration of decisions whose objective is to transform into actions, intending to achieve the stipulated by the advertiser when placing an advertisement in the possession of consumers. In short, the advertising strategy indicates to advertisers the path they must take to achieve the proposed goal (Cortjens, 1989).

According to Cortjens (1989), advertising strategy must obey four parameters:

- What is the purpose of the advertisement?
- Whom is the advertisement for?
- What is the content that should make up the advertising message?
- How and when will the advertisement be distributed?

Laskey et. al (1989) argue that the creative strategy focuses on the definition and creation of the content of the advertising message. In other words, creative strategy is concerned with what is said and how it is said. Moriarty (1991) argues that the content and the delivery of the message should be the focus of the creative strategy.

In conclusion, the advertising strategy consists of planning to achieve the objective of the advertisement. The creative strategy focuses on the following topics: who, why, what, where, when and how.

Advertising Appeals

Advertising appeals are mostly divided and emotional and rational (Solomon et al, 2012). Laskey et. al (1989) argue that there must be different strategies for different categories of advertising. First, the authors share the concept of the message and informational (rational appeal) and transformative (emotional appeal). Within the informational message, there is the comparative category, the single value proposal, the preventive category, the generic category and the hyperbole category:

- Comparative category: Compare explicitly with the competition.
- Unique value proposition: Assign a unique benefit to the product and promote it.

- Preventive category: Superiority based on a tested benefit.
- Hyperbole category: Superiority supported by an untested and exaggerated benefit.
- Generic category: Focus on the product class.

Within the transformative message, we are faced with the image of the user, the image of the brand, the occasional use and the generic:

- User image: Focus on the product's users and their lifestyle.
- Brand image: Focus on the brand's personality.
- Occasional use: Use of the brand on special occasions or user experience.
- Generic category: Focus on the product class but add transformation.

Rossiter and Percy (1991) share advertising appeals equally but within the concepts of informational message and transformative message. First, the authors defend the existence of types of motivation, which can be negative or positive. Then the authors divide the appeals into low or high involvement.

Hetsroni (2000) created a list of advertising appeals: adventure, beauty, collectivist, competition, excellence, convenience, courtesy, savings, efficiency, happiness, family, health, individualism, leisure, modernization, charity, patriotism, popularity, quality, security, sex, tradition, wealth, wisdom and young spirit. It is important to analyze emotional and sexual appeals more carefully. Emotional appeals, as the name implies, intend to create an emotional relationship between the consumer and the product. Emotional appeals are not limited to generating positive emotional responses, but can also arouse consumer negativity towards a product or idea (Sousa et al., 2020).

The emotional advertising appeal is a major driver of the relationship between the consumer and the brand (Panda & Mishra, 2014). Understanding the effectiveness of advertising appeals is essential for any brand, since advertising is an extremely important factor in the marketing mix.

The appeal to the emotional began to be widely used in the world of fashion, and then expanded to the world of personal care products, automobiles and high-status goods. The consumer involves their purchase intention with the emotional appeal present in the ad (Panda & Mishra, 2014).

In the 1980s, emotional appeals proved to be fundamental in advertising political campaigns. In the same decade, researchers began a variety of surveys on the influence of the media on the public, looking to see if emotion would serve as a weapon for advertising companies. For example, political ads that use emotion are the most effective among voters (Brader, 2016)

Currently, most of the advertisements propagated on the internet are created based on emotional appeals (Srivastava, 2008). It is important to select the appeal that will be most effective with the consumer (Plessis, 2000). The advertiser can use the emotional appeal, the rational or both:

- Rational appeals: Used when dealing with functional or practical needs (e.g., economy, health and safety).
- Emotional appeals: Used when dealing with social needs or psychologies (e.g., romance, comfort and satisfaction).

In advertising that uses rational appeals, consumers choose and decide based on logic and utility. Rational thinking influences the consumer's purchase decision. In advertising that uses emotional appeals, the objective is to make the customer feel good and create emotional associations with the brand.

Emotional appeals try to lead the consumer to purchase the product based on the emotion, whether negative or positive. Guilt, fear and shame are the most used negative emotional appeals to lead consumers to purchase a product. Regarding positive emotional appeals nostalgia, patriotism and joy often influence consumers. All of this is developed so that the consumer creates a relationship with the brand and has a positive attitude towards it (Panda & Mishra, 2014).

Sex appeals emerged in the 1970s in print advertising. Since then, there are several types of sex appeal in advertising (Cunha & Sawerbronn, 2014):

- Exposure of the body and nudity.
- Behavior of a sexual nature.
- Sexual context.
- Sexual references.

Sex appeal is perceived as a complex concept. If on one side of the scale we find ads with nudity and explicit sexual content, on the other side we can find subliminal sexual messages (Gould, 1992; Brown & Bryan, 1989). Sex appeals make up an important share of advertising and continue to be an extremely popular advertising technique. That is, sex remains a tremendously effective promotion platform (Black & Morton, 2015).

When the consumer watches advertisements that contain sex appeals based on their own gender, this often leads to the decision of not buying the product. That is, when consumers see their objectified gender in the ad, they do not feel comfortable understanding and fulfilling their shopping needs with the respective brand (Latour & Henthorne, 1994; Petroll et. al, 2007; Machado et al., 2020). A study of Turkish students concluded that they were concerned about the excessive sexuality present and promoted in advertisements. However, despite the perception of sexual content, the researchers concluded that adolescents bought the advertised products, despite that perception (Erkaya, 2017).

A study carried out with young university students, aged between 19 and 25, found that they perceived sex appeal in advertising. However, the authors did not reach a conclusion in what concerns the intention to purchase. The authors stated that sexism was already deeply rooted and normalized in the consumer's mind to study the subject at that moment (Cunha & Sawerbronn, 2014).

Despite the increase in sexuality advertising in the 1990s, its effectiveness has always been a subject of debate. The use of sex appeals is often seen by advertisers as a way to distinguish themselves and outperform the competition (Belch et. al, 1990). Several factors influence the effectiveness of this type of sex appeal, including the gender of the recipient of the advertising message, the sexual nature or not of the product being advertised and the type of sexual stimulus used (Belch et. al, 1990).

The researchers found that attractive models attract more attention. The use of sex appeals leads to negative perceptions about the product and is questionable when the advertised product is not of a sexual nature (Courtney & Whipple, 1983). The authors emphasize the importance of understanding the verbal and non-verbal cues of television ads in order to understand and study the sexism and stereotypes present in them. In addition, the context and taste of the scene are also fundamental objects of study.

The Influence of Advertising on Society

Advertising is found everywhere, from the most complex to the simplest mean of communication. Its importance in society has been undeniable since its inception; there are few industries in the world with such influence, reach and responsibility towards society. As a result, it becomes more than essential to analyze what happens in its intricacies, unveiling its supposed flaws.

Advertising has a formative influence on our culture. The entire population experiences it involuntarily due to its proliferation. There are few industries as magnanimous as advertising, it aims to attract attention and stimulate and command behavior. The social context in which it operates shapes advertising, with interferences in its practice and consequences in terms of the values it transmits to the public. It is also an excellent way to study the social changes of a country (Santos, 2005).

Applied to different social contexts, advertising does not cause the same social phenomena. It is influenced by culture, economy, society and politics, hence its differences in performance in time and space. It is extremely important for the advertiser to understand the social context for which the ad will be made. It is only after careful observation and study that the advertiser will decide the designs of the marketing communication (Santos, 2005). If some authors argue that advertising is irresponsible for influencing the values of society, others claim that advertising is only a mirror of what happens in society, not creating values but exposing those that already exist (Gilly, 1998; Courtney & Whipple, 1983).

Consumers are able to retain high amounts of information from the ads, and they easily perpetuate it in their mind (Krugman, 1965). Sometimes, to reach and persuade the consumer, celebrities and "product endorsers" prove to be the best way to expose the credibility of a brand to the consumer. This happens mainly when the product does not require much involvement (Copioppo & Schumann, 1983).

It is also important to discuss the influence of subliminal advertising. This type of advertising has the purpose of influencing the consumer's subconscious and, consequently, the behaviour towards a certain product. The objective is to change consumer preferences and attitudes towards the products and values advertised (Verwijmeren et. al, 2001; Trappey, 1996).

Subliminal messages represent a major concern for society, as they are easily inserted in different spheres. The person who protests against this type of advertising may likewise be the one who spreads the subliminal message. Many companies are aware of the ethical implications of subliminal advertising, but are not shy about using its benefits. The three techniques of this type of advertising focus on visual stimulation, accelerated speech and sexual images or words hidden from view. In the end, the more intense the technique, the greater the influence exerted on the target audience (Trappey, 1996).

SOLUTIONS AND RECOMMENDATIONS

This chapter presents a theoretical reflection on the theme of sexism and its implications for marketing and communication. As an exploratory study, the present chapter presents contributions in the area of management and communication. Future studies should be conducted in order to better understand consumers' perceptions of this phenomenon. The authors suggest complementary studies, in particular through qualitative (i.e., focus group) and quantitative (i.e., consumer surveys) methodology. It will be pertinent to compare different perceptions by gender, age and generations of consumers. Future studies should allow the development of empirical work. From an interdisciplinary perspective, future studies should present contributions to communication, marketing and publicity around sexism. The chapter offers a practical contribution where it explores the reasons behind the lack of care about the sexism displayed in advertising by the consumers when they are about to purchase a product or service. It provides a considerable range of motives that can explain that disinterest and that allow other investigators in the future to explore how to solve the situation that contributes to the perpetuation of gender inequality.

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KEY TERMS AND DEFINITIONS

Consumer Behavior Online: The study of individuals, groups, or organizations and all the activities associated with the purchase, use and disposal of goods and services, including the consumer's emotional, mental and behavioral responses that precede or follow these activities in the online environment.

Digital Marketing: Is the marketing of products or services using digital technologies, mainly on the Internet, but also including mobile phones, display advertising, and any other digital medium.

Sexism: Sexism is prejudice or discrimination based on a person's sex or gender. Sexism can affect anyone, but it primarily affects women and girls. It has been linked to stereotypes and gender roles, and may include the belief that one sex or gender is intrinsically superior to another.

Social Media: Is the collective of online communications channels dedicated to community-based input, interaction, content-sharing, and collaboration (e.g., websites and applications, forums, microblogging, social networking, social bookmarking, social curation, and wikis are among the different types of social media).

Chapter 13
NGO Sustainability Indicators:
Evaluation of Greening Commitments Through Their Website Content

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ABSTRACT

This chapter revolves around the commitment to sustainability of non-governmental organisations (NGOs). It deals with the construction of a system of indicators of the greening of these organizations, taking as a reference the possible evidence of their commitment to sustainability. These indicators have constituted the basis for the design and validation of an observational record (an estimation scale) to assess said commitment. This observational scale, made up of 51 indicators divided into 10 large dimensions, enables the estimation of the degree of presence of these aspects in the work carried out by NGOs, using the information available on the corporate web portals of these organizations as a source of analysis. From an exploratory perspective, and after applying the designed instrument, this work aims to characterize the greening tasks developed by eight NGOs (in both Spain and internationally): Cruz Roja (Red Cross), Manos Unidas, Agua de Coco, APDHA Calor y Café, Médicos Sin Fronteras (Doctors Without Borders), Amnesty International, and Setem-Andalucía.

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INTRODUCTION

Non-Governmental Organisations (NGOs) are a fundamental dimension of current societies to channel citizen participation in the face of various kinds of problems. These organisations maintain a close and direct relationship with the people with whom they intervene, enabling the development of far-reaching participatory and mobilizing dynamics. At times like these, characterized by health, economic, social and environmental crises, NGOs intensify their role as agents of social change and become key tools for activating the social fabric and citizen engagement. Linked across local, national and international networks, these organisations make a very good use of the resources available to them and are capable of creatively energizing multiple-energies and using finances to carry out their objectives (Herranz, 2007). In general, NGOs enjoy wide support and social prestige, thought they are at times are subject to some criticism regarding their financing models, transparency, public information, resource management and internal organizational dynamics.

NGOs focus on values, principles and rights that states often abandon or do not sufficiently address (solidarity, cooperation, etc.), and thus become guarantors of controversial policies and initiatives, with states sometimes using these organisations as legitimating elements of these policies and initiatives. Although each organization has specific purposes, the general purposes sought by NGOs are related, in all cases, to change, social transformation and the improvement of cultural, territorial and personal contexts.

In recent years, there has been a noticeable shift toward a great number of NGOs, -whose end goal and purpose focus on educational, social-health, equity, development, inclusiveness and cultural integration objectives-, integrating an environmental dimension into the plans, projects and initiatives they develop. These organisations use a sustainability dimension as a nexus of coherence and environmental commitment for the development of their programs, as well as a challenge for the organization itself with its internal democratic structure, operating dynamics and management models.

This study focuses on sustainability commitment of NGOs. Its objective is twofold: on the one hand, to define some indicators of this environmental commitment; and on the other, to design and validate an observational instrument for the analysis of the NGOs corporate greening task present on their websites.

Among the main questions that this chapter addresses, we are interested in answering the following: why do NGOs need to innovate and improve their corporate communication? Why do NGOs need business greening?

Recently, a number of large corporations, companies and public and private institutions try to show an increasingly innovative corporate communication image. One of these most recent areas of innovation is one that emphasizes its environmental commitments and publicly shows society through its corporate image that this environmental dimension is explicitly defined and included in its corporate policies, in its products, programs and actions. And that appears as a desirable horizon to be progressively achieved in its strategic plans. Showing the green face of an organization, using environmental icons and advertising references based on climate action, emission reduction, circular economy principles, efficient energy management or adopting continuous recycling measures contributes positively to solving part of the environmental problems. Incorporating sustainability elements in your corporate portals gives a very good public image and adds value to an organization. Showing policies of ecological transparency and being accountable with any of the 17 SDGs of the United Nations 2030 Agenda is a factor of modernization. But also using “green products”, displaying “ecological slogans” and making visible brands of “commitment to the sustainability of the planet” can simply be instruments of “ecomarketing” and “greenwaching”.

This chapter provides methodological instruments for the control of corporate transparency and proposes internal and external audit and evaluation tools of the quality of NGOs, in relation to their commitments to the environment and sustainability. The text offers a useful instrument that allows an in-depth analysis of whether the use of greening and sustainability elements linked to the image and corporate portal of NGOs actually entails broad commitments and effective engagement actions with the environment.

BACKGROUND

NGOs Corporate Identity

Over 50,000 NGOs operating in developing countries have recently been identified. Some estimates calculate a volume of financing exceeding 10 billion dollars from international institutions, European, American, Canadian, Japanese government agencies, etc., and from different national and international governments (Petras & Veltmeyer, 2003). As these same authors indicate, there have never been so many social, political, economic, educational, technological and legal initiatives and initiatives of this nature.

In developing countries, a large part of the population lacks the personal resources and legal, organizational and communication skills to defend their interests, collective rights and resources in their territories. In many cases, their condition of marginality, poverty, low educational levels and isolation, makes them feel helpless in the face of external pressure from multinationals, extractive megaprojects and industrial interests that see the states as allies of the investors' economic interests. In this scenario, NGOs are civil society groups that act altruistically in favour of the interests of the most vulnerable and least favoured communities, trying to claim human rights where states either do not assume their responsibility or play undemocratic roles in transcendental environmental issues or essential human rights. NGOs are necessary instruments used to confront unfair practices, whose purpose is to demand that governments comply with their legal and normative duties, and commitments, as well as to create structures that strengthen human rights and the functioning of domestic norms and institutions, shielding the vulnerable populations from the harmful effects of megaprojects (Aspinwall, 2020).

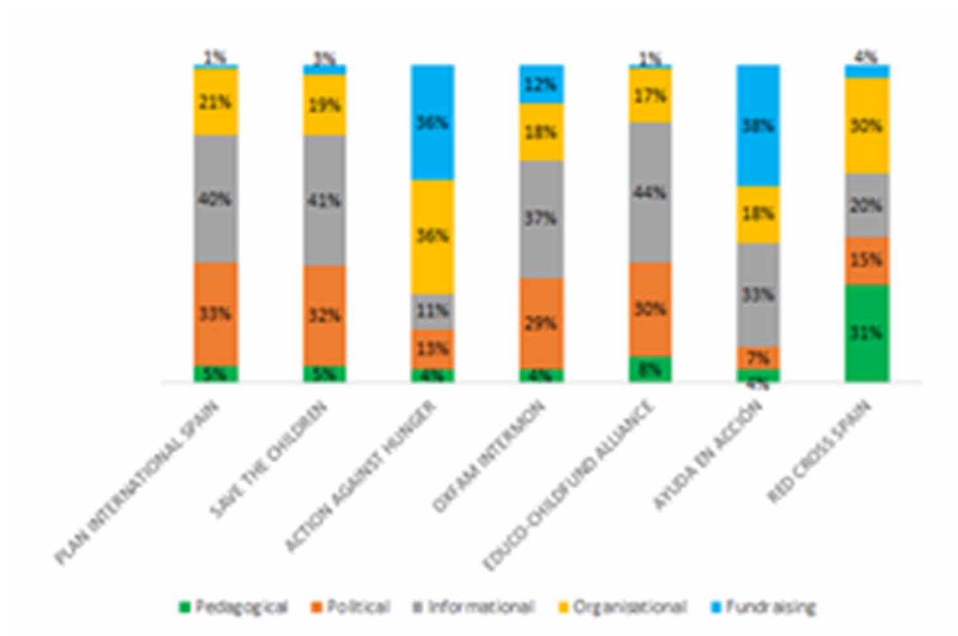
Different types of mobilization and social alliances for the defence of human rights and the rule of law have been identified when promoting organizational structures that exercise social, economic, political, educational and health control over the ineffectiveness of the states and the abuse of markets. In all of these, the concept of civil society has a variable composition that brings together divergent interests, forms of organization and heterogeneous and unique positions in each context, mediated by a multifaceted conglomeration of social actors subject to different levels of organization, coordination and capacities for change (Olvera, 2003; Petras & Veltmeyer, 2003).

Empirical Research & Types of NGO

There have been some attempts to classify these organisations according to their functions, degree of organization, institutional dependence or identity of their purposes, among others. Some of these organisations are focussed on environmental aspects and management of rights related to natural resources - Quadri (1990) identifies four trends: focused on social transformation and public awareness, alternative technologists, libertarians, conservationists; Kurzinger et al.(1991) differentiates seven clusters: action groups, research groups, concerned citizens, mass media artists, protected area management groups, mobilizing consultancy and ecology in situ; Alfie (2005) differentiates five types of NGOs: grassroots, professional, technical, official and umbrella; Arias (2016) suggests three groups: conservationists, ecologists and environmentalists, and; Aspinwall (2020) distinguishes four types: self-help, activists, social alliance, and dependents.

Authors such as Quintana (2020) have explored the specific interests shown by the discourses of different types of organizations depending on their size and coverage. Figures 1 and 2 show the differences in a sample of seven very large NGOs and 15 smaller ones, depending on whether their purposes are pedagogical, political, informative, organizational or fundraising.

Figure 1. Discourses of big size & coverage NGOs (Quintana, 2020)
Source: Quintana, 2020



Tarazona et al. (2020) have studied the incorrect use of the corporate identities of 49 NGOs and the effects that all this entails in terms of poor image, discrediting and potentially unfavourable attitudes toward the organization that does not maintain a vigilant stance on the consistent and responsible use of its brand or identity signalling/iconography. Figure 3 shows some of the errors related to incomplete texts, cropped logos, low image resolution, etc. The authors conclude by citing a number of quality criterion that they regard as essential to maintaining the coordination and coherence of the identity iconography of these networks and the image they project into society.

Based on a sample of 117 organizations classified into three typologies (focused on development, environmental conservation and other purposes), Díaz et al. (2011) have analyzed the themes and the types of programs promoted by NGOs; and concluded that: 1) Regarding the themes by the organizations, 66% of NGOs carry out activities related to climate change, 53% maintain activities on biodiversity and

Figure 2. Discourses of small size & coverage NGOs (Quintana, 2020)
Source: Quintana, 2020

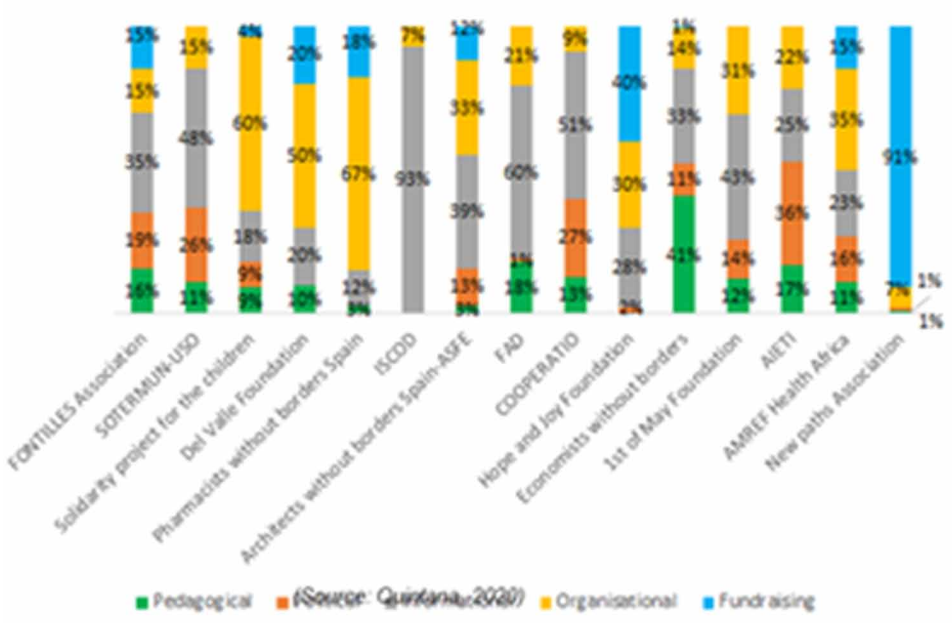


Figure 3. Incorrect use of the ONGs corporate identities (Tarazone et al., 2020)
Source: Tarazona et al., 2020

only 38% deal with desertification issues. 2) Regarding the programs and activities carried out more frequently by all types of NGOs, those relating to awareness and non-formal education stand out. Political advocacy, outreach, campaigns and citizen mobilization are the most frequent activities for NGOs - an expected result given environmental issues are central to their purposes. These results also highlight the current trend to focus efforts on mitigation and adaptation to climate change, rather than adopting a systemic view of the interrelationships and synergies of the multiple dimensions of global change. Mainly, NGOs that address issues with a focus on the sustainability and commitment to environmental issues, recognise the need to assume commitments to sustainability in its different facets (environmental, social, economic and ideological), and to act from the premises and basic principles of Environmental Education (EE), supporting sustainable development, promoting citizen engagement and responsible consumption, denouncing social inequalities and defending human rights.

Corporate Greening & Environmental Management

The commitment of these agents of social change to EE is reflected in different statements; it was the Belgrade Charter (1975) that first emphasized that EE can be done in both a formal and non-formal way, thus including agents and institutions not initially considered. Another example of this is the Rio Summit (1992), where Agendas 21 were discussed and the Global Citizen Forum was established, which influences NGOs and their commitment to the environment. These demands have been widely proclaimed over the last decades across various forums, summits, congresses, events and international alliances in a systematic way (I Ibero-American Congress on EE, Declaration of Thessaloniki 1997) in the form of manifestos, declarations, decalogues and challenges to undertake. In all of these, NGOs occupy a prominent place. Some examples of the spheres of action of many NGOs include the great objectives of the millennium (eradicate poverty, achieve universal primary education, promote gender equality and empower women, reduce infant mortality, improve maternal health, combat HIV, malaria and other diseases, promote environmental sustainability and foster a global partnership for development), and the 17 SDGs in the 2030 Agenda (end poverty, zero hunger, health and well-being, quality education, equality gender, clean water and sanitation, affordable and clean energy, decent work and economic growth, industry, innovation and infrastructure, reduce inequalities, sustainable cities and communities, responsible production and consumption, climate action, underwater life, life of terrestrial ecosystems, peace, justice and strong institutions, alliances).

However, and despite these initiatives and the focus placed on them in the work of NGOs, there remains a great lack of knowledge on the scope of the environmental task of these organizations and their levels of corporate greening and commitment to the different areas of sustainability (economic, environmental and educational). Recent works, such as that of Martínez and Navarro (2020), address the degree of commitment of these organisations to the 17 SDGs. These authors, based on semi-structured interviews with experts from non-governmental organizations and on life stories with young gang members, analyse the incidence of youth gangs in the El Salvador Development Agenda and identify the risk factors of policies aimed at youth. The main results of the study reflect how youth gangs, violence and the failure of public policies have limited the achievement of the development goals.

Belda et al. (2020) identify three types of positions in the views of civil society actors on the adoption of the SDGs in development cooperation: first, a positive and optimistic position regarding the adoption of these goals to address the problems of cooperation; second, a critical stance on specific aspects, which understands that specific changes must be made in the way in which the SDGs are understood;

thirdly, a more radical and profound critical position, which calls into question the general approach of the SDGs and their validity for a more transformative cooperation.

Núñez (2020) explains that over the last decade, NGOs involved in international aid have developed a strengthened quality control process. This empirical study analyses how this process translates into a variety of tools, and reveals the ambiguous definition of quality within NGOs. The concept can be understood simultaneously by the actors as complying with procedures, having technical expertise, and/or successfully carrying out social missions. The debates and compromises arising in practice from the choice of tools shed light on what is at stake beyond the technical characteristics of these tools: is this quality control process an unprecedented opportunity for NGOs to strengthen their sociopolitical role in society, or is it just another step in the bureaucratization imposed on the aid sector? (Núñez, 2020).

The terms environmentalization and corporate greening of NGOs, the object of attention in this work, refers to the adoption by NGOs of the principles and premises of the great summits and documents on EE, which are related to sustainability, citizen engagement, consumption, health and the vision of EE and the environment (Gutiérrez et al. 2010).

Understanding the extent to which the work carried out by NGOs responds to the agreements reached in the major summits on EE and the coverage given to some of the principles and sustainability commitments set out in the International Agendas is part of this study. The lack of empirical literature and systematic research linking EE and NGOs (Arias, 2016; del Valle et al., 2020) justify our interest in an issue that we consider important, an interest that can provide some insight and improve the initiatives carried out by these organizations, leading to improvements to society and the environment and, consequently, to a fairer and better world.

MAIN FOCUS OF THE CHAPTER

Issues, Controversies, Problems

This study aims to approach the construction of a system of indicators of the environmentalization of NGOs, taking as a reference the possible evidence of their commitment to sustainability. These indicators support the design and validation of an observational record (an estimation scale) to assess this commitment, based on an analysis of the information available on the websites of these organizations. From an exploratory perspective, and after applying the designed instrument, the environmentalizing task developed by eight NGOs (both Spanish and international) is characterized. The work presented in

Table 1. Phases of the study

	Purpose
Step 1	• Characterize some dimensions on which to define indicators of the NGO’s environmental effort.
Step 2	• Define and validate indicators of an NGO’s commitment to EE • Design and validate an observational scale for the analysis of the presence of the indicators identified in the public information available on the corporate websites of these organisations
Step 3	• Apply -in an exploratory and experimental way- to a sample of NGOs, the observational registry of data that has been designed based on information provided by their websites.

this chapter is the exploratory phase of another larger study that is currently underway, whose objective is to identify and build a system of indicators of the environmental quality of current NGOs.

The methodological sequence of the study is organised into three phases, with each phase addressing a specific objective (Table 1):

The sources of information, the methodological approach and the analyses carried out in each of these phases are described below:

Step 1: Characterize some dimensions on which to define indicators of the corporate greening tasks of NGOs

The documents analysed have been those that resulted from some of the first international meetings and summits focused on EE: the Stockholm Conference (1972), the Belgrade Charter (1975), the Tblisi Declaration (1977), the Moscow Congress (1987), the Talloires Declaration (1991), the Earth Summit (1992) and the Thessaloniki Declaration (1997)[1]. The analysis of the repercussions of these meetings for NGOs, specifically on their commitment to EE, has been used as the first step in identifying dimensions around which to begin to define indicators of compliance to these commitments, that is, what we have called the environmentalizing or corporate greening tasks of an NGO.

We have identified ten dimensions after a first analysis of this documentation: Sustainable Development, Citizen Participation, Social Inequalities, Human rights, Resources & Methodologies, Consumption, Vision of EE, Vision of the Environment, Vision of History & Culture, and Environmental Issues.

A second analysis of these statements and documentation has allowed us to define specific sub-dimensions on which to identify evidence of corporate greening (Table 2):

Step 2: Indicators of an NGO's commitment to EE: content validity by evaluation of expert judgment

Initial consultation with a group of experts (theorists and professionals of EE and Social Action) enabled us to define a first list of evidence of the environmentalizing (corporate greening) task of an NGO, using the dimensions and sub-dimensions initially established as reference. This evidence was converted into indicators that were provided to these experts to evaluate during a second consultation; the scale used for this allowed us to understand opinions on the relevance (importance), coherence (in relation to the dimension and sub-dimension of reference) and clarity (syntactic and semantic) of each of these indicators, and the suitability of using this evidence as proof of the corporate greening of these organizations.

The analysis of the contributions provided by these experts led us to consider two types of modifications to the initial draft: a change in the reference dimension of some indicators and a change in the wording of others. The dimensions and indicators established in the first stage of this phase have been the basis for the design of an instrument to analyse the corporate greening task of NGOs through the information they publish on their websites.

The first version of the instrument we designed was applied, on an experimental basis, on a group made up of four NGOs, which allowed us to make improvements on it, guaranteeing its validity and practicality. The purpose of this experimental application was to verify the extent to which the indicator used would serve to demonstrate the corporate greening aspect from the information available on the website of an NGO. For this, a rating scale was used, ranging from 1 ("It is not possible to demonstrate this aspect through the information available on the website") to 5 ("It is easy to demonstrate this aspect through the information available on the website"). The descriptive analyses carried out informed us of new modifications required to the defined indicators and their assignment to a dimension.

Table 2. Dimensions for the analysis of the environmental efforts of NGOs

DIMENSION	SUBDIMENSION
Sustainable Development	Energy Water Climate change Natural resources Renewable energy Biodiversity Responsible use of resources Human action impact System vulnerabilities
Citizen engagement	Cooperation Participation in society Citizenship belonging
Social Inequalities	Differences between people Non-discrimination Complex causes of inequalities Solidarity Poverty Negative consequences
Human Rights	Universal Rights
Resources & Methodologies	NGO organisation Democratic methodologies Specific features
Consumption	Fair and responsible trade Organic products Reduction, reuse, recycling Consequences of consumption
Vision on EE	Broad vision NGOs and EE Referent EE Summits EE as tool
Vision on Environment	Anthropocentrism Natural, social and cultural Interrelation of environment
Vision on History and Culture	Cultural diversity Historic importance Location-region characteristics
Environmental Issues	Responsibility Pollution Solutions Harm problems Loss of resources Loss of quality of life Greater social inequalities Solutions

Finally, a scale was designed consisting of 51 indicators of the corporate greening of an NGO, divided into 10 large dimensions. This scale enabled the estimation of the degree of presence of the 51 aspects indicated in the tasks carried out by NGOs, using their websites as a source of analysis (Table 3).

Step 3: Exploratory analysis of the corporate greening task of a group of NGOs from analysis of their websites

Table 3. Scale of Estimation of the greening tasks of NGOs. Analysis of their websites.

	Value (1)	Observation
Sustainable Development		
It takes into account and/or is concerned about the living conditions that future generations will have.		
Values and protects biological diversity.		
Shows concern about the loss of natural resources.		
It has a broad vision of Sustainable Development, not just from an environmental approach but also from an economic and social point of view.		
Proposes the improvement of technology and social organization so that the environment can recover at the same rate that it is affected by human activity.		
Promotes savings in energy and water.		
Takes a positive view of renewable energies.		
Sees natural, social and cultural systems as vulnerable.		
Shows concern about environmental pollution.		
Acknowledges human action as an impact factor on nature.		
Citizen Participation		
Promotes the participation of people in society.		
Positively values cooperation between people seeking common good.		
Fosters the feeling of citizen belonging (cultural identity, social ecosystem).		
Social Inequalities		
Promotes social justice.		
Rejects the discrimination of individuals due to their positions in aspects related to social, cultural, economic, religion, sexual orientation, etc.		
Considers that freedom, justice, peace, respect or solidarity must have a universal nature.		
Takes into account that social inequalities have complex causes.		
Considers that social inequalities have negative consequences for the whole of society.		
Promotes solidarity between people.		
Fights against poverty or encourages to end it.		
Shows the institution as an agent of social change.		
Human Rights		
Makes references to the fundamental ideas expressed in the Declaration of Human Rights (health, education, peace, identity, etc.).		
Bases its initiatives on the defence of Human Rights.		
Resources and Methodologies		
Carries out initiatives with democratic methodologies (greater participation and decision-making power of individuals).		
In the initiatives it promotes, it takes into account personal and local characteristics.		
Uses resources in its initiatives that promote the exchange and recognition of the environment.		
Consumption		
Encourages responsible consumption of natural resources.		
Promotes the consumption of fair trade products.		
Displays an awareness of the consequences that consumption has on the environment.		
Favours the consumption of organic products.		
Manifests the lack of consumer goods in disadvantaged areas and seeks solutions to alleviate it.		
Considers the reduction, reuse and recycling of waste derived from consumption as a beneficial aspect for the environment.		
Vision on Environmental Education		
Understands Environmental Education in a broad sense (formal and non-formal).		
Takes as a reference the prominent summits or documents on Environmental Education.		
Considers Environmental Education as an important tool to achieving pro-environmental behaviours.		
Shows NGOs as potential agents for Environmental Education (capable of carrying out tasks of Environmental Education).		
Vision of the Environment		
Overcomes anthropocentric positions, that is, it does not consider people as the central and dominant element of the environment.		
Considers the environment to be a system of interrelated and interdependent elements.		
It refers to the environment as natural, social and cultural.		
Vision of the History and Culture		
Acknowledges history and culture as a source of growth for peoples.		
Values history and knowledge of the past as relevant to understand the present and improve the future of peoples.		
Takes into account the cultural and physical characteristics of the places where it plans initiatives.		
Acknowledges cultural diversity as a means to achieve a more satisfactory intellectual, emotional, moral and spiritual development.		
Environmental Issues		
Promotes recognition of individual responsibility of citizens for their generation		
Shows concern about environmental problems (climate change, environmental degradation, coasts, etc.).		
Considers that the main victims of environmental problems are primarily the most socially disadvantaged people.		
Shows concern for the loss of natural resources and for environmental pollution (seas, forests, etc.).		
Sees environmental problems as a cause of loss of quality of life.		
Considers environmental problems to be a consequence of an irresponsible relationship of people on the planet.		
Promotes the search for solutions or alternatives to address environmental problems.		
Recognizes that environmental problems cause greater social inequalities.		
(1) Degrees of presence: 1: Absent and 5: Highly Present		

With an eminently exploratory intention, in this stage of the study that is presented here we address the analysis of the corporate greening task of eight NGOs. The criteria, -previously established by the group responsible for this study for the selection of NGOs-, includes an NGO's time in operation, their religious or secular nature, their international or local reach and their popularity. Non-environmental organizations were intentionally selected. But all of them include development and sustainability aspects in their goals and programs that are visible in the corporate elements of their web portal. The NGOs selected are outlined in the following table (Table 4):

Table 4. Sample of NGOs selected

CRITERIA	Case Type A	Case Type B
Time in Operation: Long trajectory/Short trajectory	"Cruz Roja" (Red Cross y Red Crescent) www.cruzroja.es/ It is an international charity with more than 150 years of experience. Its fields of action include social inclusion, employment, health, education, environment, emergencies, aid to the disadvantaged in an international dimension.	"Agua de Coco" (Coco Water Charity) http://www.aguadecoco.org/ It is a NOG whose main objective is to meet the needs of families in countries in conflict or with low levels of development such as Cambodia, Madagascar and Brazil. Founded in 1994, its fields of action include popular development, women's education, care for prisoners and disadvantaged families.
Religious/Non-religious	"Manos Unidas" (United Hands International Charity) https://www.manosunidas.org/ Catholic NGO that promote programmes and aid to development of third world countries; founded in the middle of the 20th century. Its fields of action include the fight against hunger, ruin, eviction, poverty.	"Asociación pro-Derechos Humanos Andalucía" (Andalusian Human Rights Association) http://www.apdha.org/index.php It is a non-profit, pluralistic, secular and independent association, founded in 1990. It promotes actions and programs of social awareness, denunciation, solidarity, support and accompaniment in situations of human rights violations. Its fields of action include prisons, education, marginalization, migration, solidarity, sex work.
International/Local Reach	"Médicos sin Fronteras" (Doctors Without Borders) https://www.msf.es/ It is an international humanitarian medical NGO of French origin, founded in1971. Its fields of action include projects in conflict zones and in countries affected by endemic diseases.	"Calor y Café" (Heat & Coffee) https://www.calorycafe.com/ It is a local non-profit association founded in 2004. It promote actions and programmes for people who are "homeless", or who suffered from a very fragile economic situation, or had serious difficulties in accessing basic services,
Popular/Hardly known	"Amnistía Internacional" (Amnesty International Charity) http://www.es.amnesty.org/index.php It is an international humanitarian medical NGO of English origin, founded in1961. Its fields of action include attention to human rights abuses and campaigns for compliance with international laws and standards. It works to mobilize public opinion to generate pressure on governments where abuse takes place.	"Setem-Andalucía" http://www.setem.org/site/es/andalucia It is a local non-profit association founded in 1991. Its fields of action include actions and programmes of solidarity, fair trade, responsible consumption, clothing and furniture recycling, awareness and education.

RESULTS AND DISCUSSION

In general, we can indicate that the degree of environmentalization of the group of analysed NGOs is medium, noting that they do not stand out for their corporate greening since the average score of all of them is 3.09, which leads us to the need to insist that more work is required and some more explicit approaches to certain issues needs to be carried out to increase its greening, sensitizing and awareness-raising tasks.

The analyses carried out indicate that the most environmentalised NGOs, according to the benchmark indicators are: Agua de Coco (M:3,96 y DT:1,28), Amnistía Internacional (M:3,49; DT:1,46) and Setem Andalucía (M:3,25; DT:1,52) and the least are APDHA (M:2,69; DT:1,1) and Calor y Café (M:2,78;1,75).

The indicators most present in the task carried out by the analysed NGOs are those that belong to the dimensions "Citizen Participation", "Social Inequalities", and "Human Rights", while the dimensions scoring the lowest were "Vision of the Environment" and "Vision of EE".

Finally, an analysis has been carried out for each of the established categories (international reach, time in operation, religious nature and popularity), despite the impossibility of generalizing the results obtained from the exploration of the websites of the selected NGOs, therefore this analysis would serve to orientate discussion but can never be generalizable. Thus, and in relation to international reach, it could be said that there are no differences in corporate greening between NGOs that have a wide international reach and those that do not, such as Médicos Sin Fronteras (2.80) and Calor y Café (2.78). We could then say that whether an NGO has an international reach or not does not condition its degree of corporate greening.

In regard to the length of time in operation, there is a large difference in scores between the oldest NGO in Spain (Red Cross- Cruz Roja) and the Agua de Coco Foundation, with a score of 3.96. The more recently created or founded NGOs are greener than those established longer.

In relation to the religious or secular nature of the NGOs, according to the data obtained, we could say that religious NGOs are slightly more environmentalized (0.18) than secular ones, as indicated by their scores (2.86 and 2.68, respectively).

In comparing the corporate greening levels of popular NGOs with those that are less known, it can be concluded that the most popular NGOs, such as Amnesty International (3.49), are greener than the less well-known ones, such as Setem-Andalucía (3.25).

In a final analysis, we would also say, according to the data obtained in this study, that the most environmentalized NGOs would be those that are "new" or with little experience, perhaps due to the growth of awareness and the presence of environmental issues at present, and those that can be defined as less-green are those NGOs without international reach or those operating in a localised context, such as Calor y Café.

In light of the data presented above, we can conclude, provisionally and with great caution, that the degree of corporate greening of the analysed NGOs is medium, the NGOs are green but only in a conservative way.

SOLUTIONS AND RECOMMENDATIONS

NGOs should be more aware of the environment and include more aspects related to sustainability, particularly to education for sustainability in their general and intervention projects and tasks.

The 2030 Agenda proposed by the United Nations as well as the 17 SDGs constitute an important challenge for NGOs and the development of a coordinated effort to achieve their shared goals through closer networking, evaluating the scope of their goals and aligning initiatives requiring development. This study has not had, nor can it, a generalizing intention, though it can lead us to become aware of the main concerns and initiatives of the different NGOs and to bring attention to those possible initiatives that go unnoticed regarding corporate greening.

The breadth of the term corporate greening has been verified, a concept that does not focus exclusively on aspects directly related to educational aspects, but rather makes clear the wide spectrum of topics and issues included in this term, which can be extended to the field of economics, the territory and the governance of the institutions.

It is clear there is some interest in contemporary literature in quality management models and evaluation methodologies applied to NGOs. This interest constitutes an area of work in which it is necessary to develop greater efforts and provide valid instruments and empirical results that are transferable to NGOs of different characteristics and purposes. Evaluative research and mixed research designs have to provide complex perspectives that address the multidimensionality and diversity of organizations.

FUTURE RESEARCH DIRECTIONS

The need for more in-depth research on the subject is recognized so that organizations become aware of their levels of commitment to the demands set by the united nations 2030 agenda and the 17 SDS. likewise, the need to broaden the focus of attention to NGOs with studies that include larger samples and longitudinal research designs that allow diagnosing progress and showing achievements that can mark differences in their corporate identity as institutions truly committed to sustainability is also pointed out. and the green management of organizations.

Address studies of broader samples of organizations and establish comparisons between environmental organizations and other non-environmental organizations that allow contrasting hypotheses about their degree of commitment and levels of involvement in supporting environmental programs and activities.

Assess whether, by virtue of being an NGO with a pro-environmental corporate identity, it really develops actions and programs with high transformative impact.

A complete the corporate identity analysis of the websites with in-depth interviews with the heads of the different organizations and analysis of the documentary content of periodic reports and intervention programs. a methodological process of contrasting and triangulating the data would allow us to go much deeper into the impact evaluation of these corporate measures, and to test whether they really go beyond “greenwaching” or “green marketing” actions.

The evaluation of the quality of organizations constitutes an innovative, fruitful and highly current field of research, although there are hardly any systematic research works that incorporate the environmental dimension into their evaluation models. this chapter opens a necessary debate on the possibility of connecting the financing of programs to some basic requirements and demands of the institutions’ commitment to sustainability in its different dimensions. research must make differentiated contributions of greater scope that delve into complementary indicators based on the typologies and characteristics of the organizations.

CONCLUSION

As indicated at the beginning of this study, NGOs must take EE into account given that the pro-environmental behaviours that EE intends to develop in the population have multiple benefits across all levels of society, which can improve the situation of those specific groups that each NGO is focussed on

Perhaps, -given the current trend of increasingly including more aspects related to the environment-, this situation could change in the not-too-distant future, increasing the environmental effort of NGOs and making them true agents capable of providing EE to all levels and across the entire population. This can be seen in the data relating to newer or less experienced NGOs.

The corporate greening tasks or commitment of NGOs to the principles of EE in the initiatives they undertake is more present in aspects related to citizen participation and social inequalities. Thus, the proposed initiatives promote the participation of people in society, cooperation and solidarity amongst them, and foster a sense of citizen belonging, promote social justice, reject discrimination against individuals, denounce and encourage the end of poverty.

While the NGOs that are the object of this study have are embraced the corporate greening process, they do not fully comply with their responsibility as EE agents. It is necessary for the managers of these organizations to understand that approaching their tasks from the logic and principles of EE has global benefits and that a greater inclusion of EE in NGOs could also improve the quality of life of the specific groups to which each of them is focused on.

According with the analyzes by Quintana (2020) and Martínez and Navarro (2020), the scarce scientific literature that focuses its focus on how NGOs monitor compliance with aspects related to sustainability is verified. With the validated evaluation instrument provided by this text, we find ourselves in an intermediate current of critical stance of moderate change (Belda, 2020) that understands that what the corporate portals reflect is often more optimistic than what is actually carried out de facto in the practice of sustainability commitments. Marking an important space for future improvement for institutions and their management processes committed to sustainability.

According to the conclusions formulated by Núñez (2020) on quality criteria of NGOs, a greater clarification and transparency in financing policies is demanded conditional on a systematic external evaluation that includes elements of the corporate image but also evaluates indicators of effective commitments based on evidence of the ecological governance of the NGO, focusing on aspects such as: circular economy, low ecological footprint, reduction of CO_2 emissions and internal and external environmental quality control of organizations regarding their operation, organization and environmental programs.

New questions arise in the light of the study carried out, these questions require the development of more in-depth studies that incorporate research designs with mixed methodologies and a variety of information collection instruments that include qualitative approaches based on in-depth interviews, analysis of documentary content and indicators of the impact of the programs on the recipients. Among others, we highlight a number of questions that may guide future research:

- What coverage do NGOs give to the 17 SDGs? Is there an explicit commitment on corporate websites to the United Nations 2030 Agenda?
- What are their responses to the international challenges set by reference agendas such as the United Nations 2030 Agenda?
- What degree of compliance with the 17 SDGs is shown in their documents?
- What indicators of achievement can facilitate comparability between NGOs?

- Do they have explicit achievement indicators and evaluation processes for their sustainability initiatives?
- What impact do these initiatives have within the organisation?
- Are environmental and sustainability initiatives and programs included in the organization's Vision, Mission and Strategy?
- What type of Environmental Programs do they develop (themes, recipients, territories, etc.)?
- What support and dissemination materials do they promote (empirical research and studies, video games, guides, documentaries, videos, role-playing games, etc.)?

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KEY TERMS AND DEFINITIONS

Environmental Education (EE): Is a holistic, lifelong learning process directed at creating responsible individuals who explore and identify environmental issues, engage in problem solving, and take action effectively to improve the environment. EE can be taught formally in schools, and universities; take place in informal learning contexts through NGOs, natural centers, botanic gardens…; and non-formal education programs such as outdoor education, or community education.

Environmental Indicators (EI): Indicators reflect measures of trends in the state of the environment and monitor the progress made in realising environmental policy targets. As such, environmental indicators have become indispensable to policy-makers. Various types of indicators are used to evaluate the state of the environment; five types are widely mentioned in research and report: indicators for driving forces, pressure and state are mentioned most often; followed by response indicators; and impact indicators are merely used for a few specific issues, such as changes in 15 human health due to an increase in concentration of pollutants, damage to forests due to emissions and disturbance of people due to noise.

Environmentalization: It refer the process of production and internalization of the environmental issue in the different spheres of social and moral instructions of individuals as an ethos. Is a transition process from social-democratic to neo-conservative regimes of social regulation of economy and society.

Greening: Is the process of transforming living environments, and also artifacts such as a space, a lifestyle or a brand image, into a more environmentally friendly version (i.e. 'greening a university' or 'greening a NGO'). The act of greening generally involves incorporating more environmentally friendly systems into one's environment, such as the home, workplace, and general lifestyle.

Non-Governmental Organizations (NGOs): A non-profit organization that operates independently of any government, typically one whose purpose is to address a social or political issue.

Sustainability: Sustainability is focuses on meeting the needs of the present without compromising the ability of future generations to meet their needs. The concept of sustainability is composed of three pillars: economic, environmental, and social—also known informally as profits, planet, and people.

Sustainable Development Goals (SDG): The Sustainable Development Goals (SDGs) are a collection of 17 interlinked goals designed to be a blueprint to achieve a better and more sustainable future for all. The SDGs were set in 2015 by the United Nations General Assembly and are intended to be achieved by the year 2030. They are included in a the Resolution called the 2030 Agenda. The 17 SDGs are: 1) No Poverty, 2) Zero Hunger, 3) Good Health and Well-being, 4) Quality Education, 5) Gender Equality, 6) Clean Water and Sanitation, 7) Affordable and Clean Energy, 8) Decent Work and Economic Growth, 9) Industry, Innovation and Infrastructure, 10) Reducing Inequality, 11) Sustainable Cities and Communities, 12) Responsible Consumption and Production, 13) Climate Action, 14) Life Below Water, 15) Life On Land, 16) Peace, Justice, and Strong Institutions, 17) Partnerships for the Goals.

ENDNOTE

1 As these are documents referenced in the foundation section, and have been widely disclosed, a more extensive treatment of this section has been omitted.

Chapter 14
Socio-Corporate Impact of the Sustainable Development Goals in Higher Education:
The Case of Public Universities in Andalusia

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ABSTRACT

Today, universities face the great challenge of becoming competently sustainable institutions. A crucial role is played by SDGs in a university's progress toward sustainability, which under the umbrella of the 2030 Agenda, set out the challenges faced by these institutions. This chapter determines the extent to which the prism of sustainability is present in the strategic planning of the public universities of the Andalusian Autonomous Community (Spain) and in their governance models. For this, the authors undertook an analysis of the strategic and operational plans of these institutions, focusing on the presence of SDGs in the various lines of action contained within them. In parallel, they also carried out an analysis of the socio-corporate image that these universities project from a sustainability perspective. The results show that these universities are motivated toward implementing a sustainable governance model, but they also highlight a number of deficiencies in addressing some SDGs that are sure to become future challenges.

INTRODUCTION

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The inclusion of the Sustainable Development Goals (SDGs) in the panorama of Higher Education is the product of the historical commitment of universities to incorporate the principles and logic of sustainability in their fields of teaching, management, research and transfer of knowledge. On the other hand, it is necessary for universities to generate their identity and corporate communication model based on the principles of Social Responsibility with the creation of new methodologies aimed at evaluating the effectiveness of these marketing strategies and knowledge transfer under the logic that marks the 2030 Agenda (Higgins and Thomas, 2016). Amongst the historical milestones that are at the basis of this commitment, we can highlight the World Conference on Higher Education (UNESCO, 1998), the Declaration of the Decade of Education for Sustainable Development 2005-2014 (UNESCO, 2005; Mulà and Tilbury, 2009), Copernicus - Guidelines for sustainable development in the European Higher Educational Area: How to incorporate the principles of sustainable development into the Bologna Process (Campus, 2009), and in Spain, the context where this study is framed, the Guidelines for Curricular Sustainability (CRUE, 2005) and Royal Decree 1393/2007, of October 29 (BOE, 2007), establishing the organization of official university education and which, in its preamble, highlights the commitment of the universities to the "knowledge and development of Human Rights, democratic principles, principles of gender equality, solidarity, environmental protection, universal accessibility and design, and the promotion of a culture of peace".

These SDGs, under the umbrella of the 2030 Agenda, set the challenges that humanity must embrace to move toward sustainability. In this task, Higher Education cannot fall behind. As Ull (2011) points out, for universities to contribute to the formation of citizens that are capable of living in a sustainable, competent and dignified manner, aware of their place within this "vital framework", it is necessary for these institutions to incorporate fundamental changes to the curriculum, ensuring it sees the inclusion of competencies for sustainability, as well as has a broader vision of the role played by educational institutions (Ull, 2011, p.2).

The educational, social, economic and environmental impacts of higher education institutions justify their commitment to comply with the SDGs from the prism of education for sustainability (Aznar et al., 2011; Higgins and Thomas, 2016).

The consideration of SDGs in university strategic plans, the creation of new structures in their governance models or the redefinition of the mission and vision of existing ones, are, amongst others, a commitment by universities to respond to these requirements by generating socially responsible and sustainably committed management models (Moon et al., 2018; Utama et al., 2018; Franco et al., 2019).

From this current framework of action, this chapter aims to characterize the treatment given to the SDGs and sustainability across the ten Andalusian public universities, through the analysis of each institution's strategic and operational plans where they set the guidelines for education and research and their projection and socio-corporate transfer.

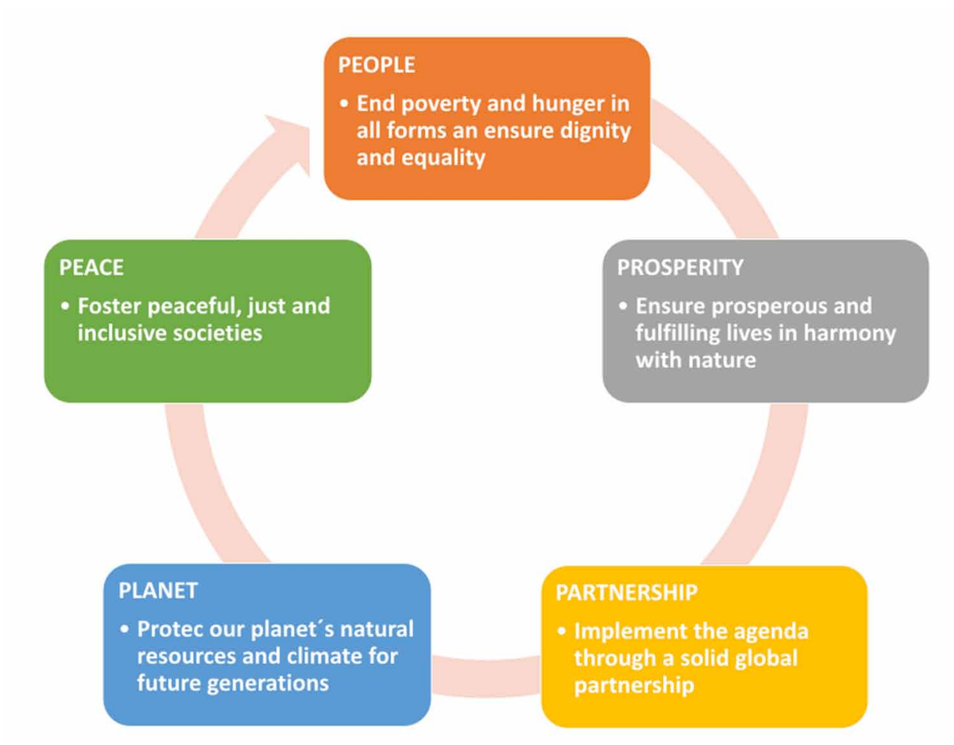
BACKGROUND

The 2030 Agenda framework and SDGs in Universities

The Resolution "Transforming our world: the 2030 Agenda for Sustainable Development" published by the United Nations General Assembly in 2015 (UN, 2015), and endorsed by its 193 members, constitutes a relevant milestone; a before and after in favor of sustainable development. Its 17 objectives for sustainable development, with its 169 goals and 212 associated indicators, is proposed as an international strategic framework of reference for social, political, economic and educational institutions globally, all of whom must have sustainable development among their aims and purposes (UN, 2015).

This 2030 Agenda is a declaration of intention that forefronts all the priorities for actions that citizen organizations must take into account in terms of sustainable development, and it cuts across strategic lines as ambitious and diverse as: energy prosperity while respecting the environment, security, peace, gender equality, freedom, the eradication of poverty in all its forms and dimensions and guaranteeing and respecting human rights (UN, 2015; Colglazier, 2015; Poza-Vilches et al., 2019) (Figure 1).

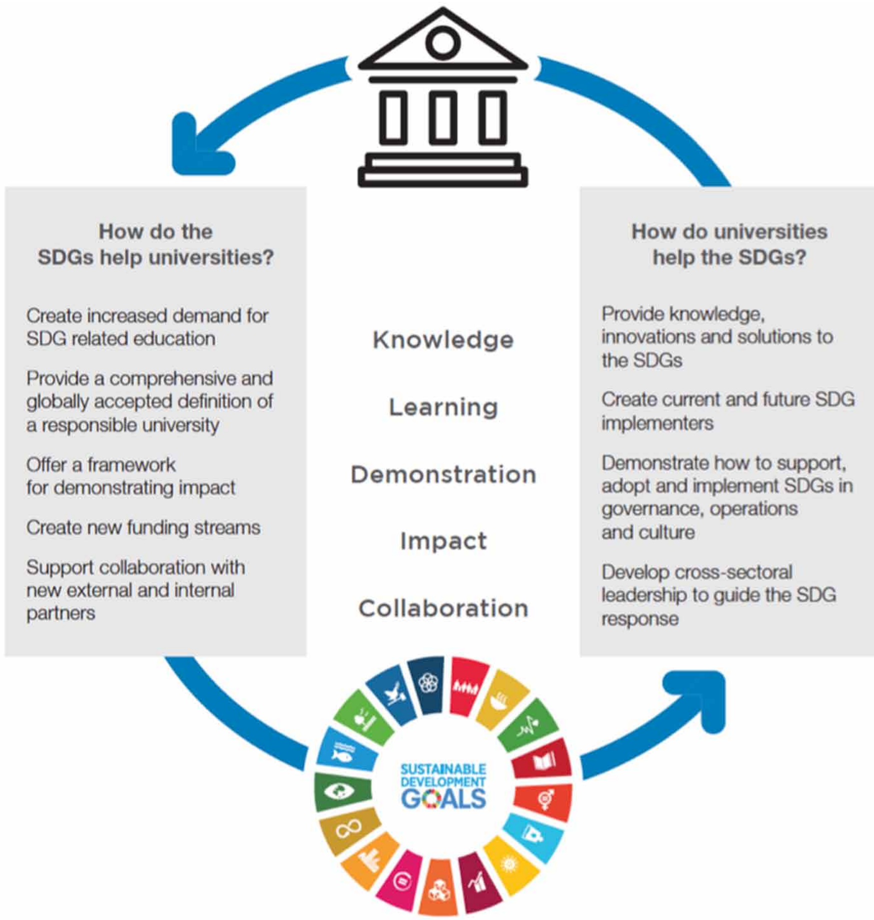
Figure 1. Sustainable Development Dimensions. Source: (extracted from 2030 Agenda for Development Sustainable, UN, 2015; Poza-Vilches et al., 2019).



This perspective of sustainable development, updated and defended by environmental policies, requires transformation on not only a socio-economic front but also a political and educational scale where institutions advocate for governance models that promote "deliberation and citizen reflection in the search for consensus and the definition of the most suitable action strategies to meet the needs of the context" (Gutiérrez-Pérez and Poza-Vilches, 2009; Poza-Vilches et al., 2019).

This multidimensionality of the SDGs provides a comprehensive and dynamic vision of sustainable development from the three axes that make up the term: economic, social and environmental axes, where sustainability is presented transversally in each SDG to provide a comprehensive response to global is-

Figure 2. Synergies between Agenda 2030 and Universities. Source: (Fuente SDSN Australia/Pacific, 2017, p.7).



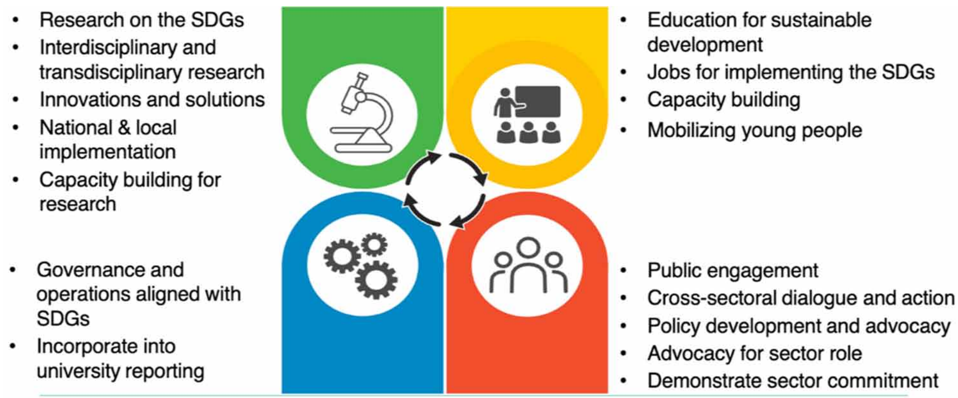
sues from the commitment of the international community (SDSN Australia/Pacific, 2017; Nhamo and Mjimba, 2020).

Nevertheless, faced with this international commitment, it is worth considering the role and responsibilities that universities are required to assume in order to comply with the guidelines set by the 2030 Agenda (Alcaraz and Alonso, 2018; Cavallo et al., 2020).

Since the publication of the 2030 Agenda and the principles therein, including all the guidelines associated with it, the governance and management models of universities globally, as well as the curricular programs, the lines of research and their social agendas for knowledge transfer, have a framework that outlines the priority of including sustainability as another indicator of excellence and university quality; a priority set by the SDSN Australia/Pacific in 2017, which, in fact, highlights the synergies that are generated between the 2030 Agenda and Universities (Figure 2)

In this scenario of confluence of the 2030 Agenda and University, it is essential to define the commitments that these institutions must assume from a work model based on sustainability guidelines, and ensure that these permeate and justify its mission, vision and values. This way of acting entails the

Figure 3. An overview of university contributions to the SDGs. Source: (Fuente SDSN Australia/Pacific, 2017, p.10).



interrelation of the 4-axes that draw together the work of the universities and which are closely linked to the SDGs (Figure 3):

Undoubtedly, the SDGs become an object of **research** and the transfer of knowledge whose importance and priority must be established in national R&DI policies.

University **curricular greening** requires training programs to ensure the development of competencies, content and methodologies that advocate the empowering of students from models of participation and collaborative work, by addressing the SDGs in a transversal way in the classrooms, under the principles of Education for Sustainability.

The **management and governance** models of higher education institutions are bound to generate models that are much more in line with the approaches of the SDGs, "aligning university government structures and operational policies with SDGs" (Alcaraz and Alonso, 2018, p.55) including the analysis of these policies, the most relevant organizational structures for each of them, and the incorporation of these SDGs in the management and design of a university's strategic plans linked to a university's Social Responsibilities (Alcaraz and Alonso, 2018). We will focus on this axis in this chapter.

Finally, **social leadership** and knowledge transfer are ways to strengthen the relationship and dialogue between the university and the context of reference and in this task, SDGs can act as the bridge to achieving this. Universities can generate dissemination and social communication structures see the participation of all citizens as their axis as well as social involvement and information and knowledge of the SDGs to favour a change of attitudes toward other pro-sustainable attitudes both inside and outside the university (Sutrisno, 2019).

In short, to impregnate the universities with knowledge, actions and pro-sustainable attitudes, is to turn toward models of university excellence, generating a sustainable, comprehensive, plural and inclusive socio-corporate image of the institution.

In the chapter that concerns us, as we have commented previously, we will focus on the axis of governance and university management models due to the transversality of its concept and, more specifically, we will focus on how the strategic and operational plans of Andalusian universities can become the protagonists of the commitment to Socio-Corporate Responsibility generated by these institutions.

International Milestones for the Implementation of SDGs Within a Tertiary Governance Model

In order to comply with SDGs from within a university setting, it is essential to start with what already exists and works, generally examples of good practice. In this regard, there are many actions, networks, platforms and projects that are linked to experiences of sustainability in the university sector, both internationally and within the Spanish context, which is the subject of this chapter (Alcaraz and Alonso, 2018).

Amongst those most relevant internationally, we should mention (Alcaraz and Alonso, 2018):

- International Association of Universities[1] (IAU), created as a space for debate and the improvement of Higher Education, who have a clear commitment to promoting Sustainable Development, as ratified by its 2016-2020 Strategic Plan.
- Union Nations Academic Impact Initiative[2] (UNAI): An international network of shared work between universities committed to the implementation of the SDGs.
- European Universities Association[3] (EUA): A platform for shared work, communication and information on trends and current affairs linked to higher education and its research policies. It develops, within the framework of the 2030 Agenda and the SDGs, its own actions and is linked to other international platforms in line with this issue.
- Higher Education Sustainability Initiative[4] (HESI): A mixed network of international public entities (UNESCO, UN-Habitat, amongst others) and universities that look to join forces to address education, research and governance from the sustainability framework.
- Copernicus Alliance[5]: A network of universities promoting change and improvement from the prism of sustainability.
- Global University Network for Innovation[6]: An international network currently managed by UNESCO and the Catalan Association of Public Universities, with a research purpose that favours reflection on different topics that change every 2-3 years, among which are the 2030 Agenda and the SDGs.

At the national level, in the Spanish context, we cannot forget the role that the CRUE (Conference of Rectors of Spanish Universities) has played from 2002 in matters of sustainability with the creation of a working group to address this issue in a university context (CRUE, 2005). At present, 60 Spanish universities participate in this CRUE-Sustainability group, and its line of action is to work on sustainability from the 4 axes mentioned above (research - teaching - management - transfer) through the professional development of university teachers.

Under this working group, there are numerous actions, initiatives and networks that have been generated at the national level, causing a domino effect that generates work models in favor of structures that facilitate the incorporation of sustainability and the implementation of the guidelines set by the 2030 Agenda and the SDGs in the university context (Miñano and García-Haro, 2020).

Sustainability and Governance Model in Universities: Good Practices

At present, and for at last a number of decades, the priorities of Higher Education institutions to face such a dynamic, committed and versatile issue such as sustainability, have marked their agendas and their governance models as a key factor in its process of adapting to the demands of modernization, integrating change in all their mission and vision statements, and in the transfer of knowledge that teaches socio-corporate responsibility that they adapt to the context and issues of socio-educational interests across the globe (SDSN, 2017; 2020).

From this logic, the strategic plan that sets a university's priorities for action will have an irremediable impact on the fulfilment and achievement of the SDGs. These institutions make up a flow of networks, people, services, actions, infrastructures, etc., with inputs and outputs that must take as a reference the approaches of the 2030 Agenda and the SDGs. This strategic framework of action is based on the logic of University Corporate Social Responsibility (RSU) and the design of the Sustainable Campus, which is a benchmark for both international universities and those in the Spanish context (Leal Filho et al., 2019b; Di Nauta et al., 2020). Aligning the four aforementioned axes with the SDGs will entail responsible and constant interconnected synergies across all areas that will emphasize a university model based on the canons of quality and excellence (Alcaraz and Alonso, 2018; Cavallo et al., 2020; Franco et al., 2019; Leal Filho et al., 2020).

Although the existence of good sustainable university management practices shows the real possibility of implementing governance models based on the principles of sustainability, these practices still have a long way to go. If we look at the exploratory study that Times Higher Education Impact Rankings (THE Impact Rankings, 2020) carries out on the fulfilment of the SDGs at 768 universities from 85 countries, we can see that the first four positions are held by universities in New Zealand and Australia, followed by Arizona State University (United States). Only three European universities make it into the top ten: The University of Bologna (Italy) ranks sixth and two universities from the United Kingdom rank eighth and ninth respectively. It is not until the 40th position that a Spanish university is featured, in this case an Andalusian institution, the University of Malaga, followed in position 51 by the University of Jaen, also in Andalusia. Two more Spanish universities are included in the top hundred, one ranking in 53rd position (Pompeu Fabra University) and the fourth in position 91, the University of Barcelona (THE Impact Ranking, 2020) (Table 1).

Table 1. Impact Ranking 2020. World Top 10. Source: (THE Impact Ranking, 2020).

Impact Rank 2020	University	Country/Region
1	University of Auckland	New Zealand
2	University of Sidney	Australia
3	Western Sydney University	Australia
4	La Trobe University	Australia
5	Arizona State University (Tempe)	United States
6	University of Bologna	Italy
7	University of British Columbia	Canada
8	University of Manchester	United Kingdom
9	King´s College London	United Kingdom
10	RMIT University	Australia

Table 2. Impact Ranking 2020. Spain Top 10. Source: (THE Impact Ranking, 2020).

Rank	Name	Best scores by rank	Overall
40	University of Malaga	SDG 7: 77.0 SDG 8: 75.8 SDG 14: 85.1 SDG 17:89.2	89.7
51	University of Jaen	SDG 7: 78.1 SDG 8: 78.4 SDG 16: 81.5 SDG 17: 70.7-80.6	88.4
=53	Pompeu Fabra University	SDG 16: 88.0 SDG 5: 72.6 SDG 13: 72.5 SDG 17: 82.7	88.1
=91	University of Barcelona	SDG 3: 79.5 SDG 4: 82.8 SDG 16: 63.2-72.6 SDG 17: 87.2	84.1
101-200	University of A Coruña	SDG 4: 85.4 SDG 3: 67.4-75.1 SDG 8: 54.5-64.9 SDG 17: 62.4-70.2	75.4-83.3
101-200	Autonomous University of Barcelona	SDG 5: 74.2 SDG 12: 68.5 SDG 3: 73.8 SDG 17: 70.7-80.6	75.4-83.3
101-200	University of the Basque Country	SDG 5: 68.2 SDG 12:74.0 SDG 3: 67.4-75.1 SDG 17: 70.7-80.6	75.4-83.3
101-200	University of Deusto	SDG 16: 83.3 SDG 8: 74.6 SDG 4: 48.7-57.6 SDG 17: 70.7-80.6	75.4-83.3
101-200	University of Girona	SDG 4: 83.0 SDG 11: 79.8 SDG 7: 68.3 SDG 17: 70.7-80.6	75.4-83.3
101-200	Miguel Hernandez University of Elche	SDG 3: 80.6 SDG 9: 53.3-74.7 SDG 10: 65.5 SDG 17: 70.7-80.6	75.4-83.3

Looking into the top ten ranked Spanish universities in the aforementioned poll, the four Andalusian universities detailed above are followed by the University of Coruña (Rank 101-200, 5th place); Autonomous University of Barcelona (101-200; 6th place); in seventh place is the University of the Basque Country (101-200) and the last three places for Spanish universities are the University of Deusto (101-200, 8th place); the University of Girona (101-200, 9th place) and Miguel Hernández University of Elche (101-200; 10th place) (Table 2).

Alcaraz and Alonso (2019), on the other hand, highlight the progress of Spanish universities in relation to the commitment in University Social Responsibility (USR). This study shows that in Andalusia, 25.6% of the universities are "USR" universities; that is, universities that, in their official documents, incorporate the development of USR policies.

In the recent report "Towards an Education for Sustainability. An analysis was carried out 20 years after the publication of the "White Paper on Environmental Education in Spain" (Benayas and Marcén, 2019) to check how the educational institutions of Spain, including compulsory primary and secondary schooling institutions and universities, have been sensitive to, and active in incorporating these educational practices in recent decades. In relation to universities, it was noted that there are advances in the actions related to the environmental management of their campuses, the creation of green structures and of offices with environmental competencies. There are also environmental awareness campaigns of the university community, but mainly in extra-curricular contexts. On the contrary, we found very few initiatives that serve to incorporate sustainability content and practices into the curricular designs of the subjects of the different degrees (Blanco-Portela et al., 2020).

But, if we look at the impact that sustainability content linked to Spanish universities has on social media, the study by De Filippo et al. (2020) shows us the impact that the actions of Spanish universities have in forums, blogs and social media sites such as Facebook and Twitter. In this study, we must note that in recent years, Spanish universities have attempted to leave a mark of sustainability in the content they publish on their websites; sustainability leads the names in the definition of management bodies; there is a considerable increase in scientific publications from Spanish universities in this field and in high-impact journals (with Andalusian universities at the top, such as the University of Seville and the University of Granada) and, finally, many of these documents are mentioned on social media (38% of documents published by Spanish universities with a topic related to sustainability are mentioned on social media; De Filippo et al., 2020, p.12).

Faced with this hopeful map of the good work of Spanish universities in terms of sustainability, the door is opened to analyzing what they do, how they are structured and what priorities Andalusian universities are setting to address sustainability and the work involved in implementing the SDGs in this context.

MAIN FOCUS OF THE CHAPTER

The Presence of SDGs in the Strategic Plans of Andalusian Public Universities

The strategic or operational plans, prior to the assessment of SDGs, constitute the instruments that allow universities to materialize the exercise of reflection required in consideration of what the institution is and what they want to be, and are also vehicles to set their objectives, actions and goals.

Strategic planning enables universities to tackle exceptional situations, such as that caused by the COVID-19 pandemic declared by the WHO on March 12, 2020, minimizing uncertainties that can affect the response capacity of these institutions and lead to questions about their leadership in education, research and the provision of services to society from economic, social and environmental perspectives.

This strategic exercise allows universities to articulate the various issues that they intend to address in a given period of time, to adopt initiatives and make decisions beyond the short term, looking to the future in order to face the challenges of the knowledge society and of the new economic and social models that we are heading toward (University of Granada, 2020).

As previously noted, each university uses their strategic plans to draw up the guidelines that need to be followed by the entire university community in order to achieve the proposed objectives across the various areas of intervention (teaching, research, governance and transfer of knowledge).

In order to understand the extent to which the prism of sustainability is present in the strategic planning of the public universities of the Andalusian Autonomous Community (Spain), and in their governance models, this chapter aims to analyze the strategic or operational plans (in some cases) of these institutions, focusing on the presence of the SDGs across the different lines of actions set out in these plans.

The following figure highlights the 17 SDGs and the focus pursued by each of them (Figure 4).

Figure 4. The Sustainable Development Goals (SDGs). Source: ISGlobal. Barcelona Institute for Global Health.

We have focused on a content analysis of the strategic plans of the ten Andalusian public universities. This methodological approach has allowed us to focus on the study of the particularity and complexity of each university in order to determine (through qualitative and quantitative techniques) the extent to which a sustainability approach is present in the strategic planning exercise of each of these institutions through an analysis of the presence of SDGs across the different lines of work proposed by each.

Universities Studied

As indicated above, those institutions constituting this object of study are ten public universities, some of which are national references in the Higher Education sector, and have a long history, such as the universities of Seville and Granada, founded in 1505 and 1531 respectively, as well as other younger universities, including Pablo de Olavide University, the International University of Andalusia, Huelva, Jaen and Almeria founded in the 1990s. The strategic plans of these universities still govern their decisions, and eight of these ten universities have their plans in force with the other two having completed a full review of these plans, these being the University of Granada, whose last strategic plan expired in 2010 and its current operational plan was approved in January 2020, and the International University of

Table 3. Andalusian universities analyzed. Source: Prepared by the authors.

University	Foundation year	Location/Province	Strategic Plan	Web
International University of Andalusia	1994	Seville, Jaen, Huelva and Malaga	2010-2014	https://www.unia.es/english
University of Almeria	1993	Almeria	2016-2019	https://www.ual.es/en?idioma=en_GB
University of Cadiz	1979	Cadiz	2015-2020	https://www.uca.es/?lang=en/
University of Cordoba	1972	Cordoba	2016-2020	http://www.uco.es/internacional/extranjeros/en/
University of Granada	1531	Granada	2006-2010 2020 (Master Plan)	https://www.ugr.es/en/
University of Huelva	1993	Huelva	2018-2021	http://uhu.es/english/
University of Jaen	1993	Jaen	2014-2020	https://www.ujaen.es/en
University of Malaga	1972	Malaga	2017-2019	https://www.uma.es/?set_language=en#gsc.tab=0
University of Seville	1505	Seville	2018-2025	https://www.us.es/
University Pablo de Olavide	1997	Seville	2018-2020	https://www.upo.es/portal/impe/web/portada?lang=en

Andalusia, whose plan expired in 2014 and is currently undertaking the design of a new one (this study uses the 2010-2014 strategic plan for analysis) (Table 3).

Andalusian universities have a wide range of undergraduate and postgraduate educational offerings across the different discipline areas (arts and humanities, architecture and engineering, sciences, health sciences, and social and legal sciences), which means a wide range of possibilities both for citizens from the Andalusian educational community as well as for those from other autonomous communities when choosing a university degree.

At an international level, the level of research and the transfer of knowledge of these universities stands out, as shown by the position of some of these institutions in the Shanghai Ranking[7]; thus, in 2019, of the 1000 institutions analyzed, six Andalusian universities were included in the ranking, and are set out as follows: the University of Granada (rated the second best university in Spain, range [2-5]), the University of Seville, the University of Cordoba, Pablo de Olavide University, the University of Jaen and the University of Malaga. The Universities of Granada and Seville stand out in the TOP 500 of the universities analyzed in this ranking in 2019.

This position is ratified by other international comparisons such as the World University Rankings[8], which ranks Spain in ninth position for countries with a number of institutions, eight of which are in Andalusia-, in its latest comparative study of the 1400 international institutions across 92 countries. In the comparison carried out by QS World University Ranking[9] there are 1002 universities across different countries, and Spanish universities -of which two are Andalusian, Granada and Seville- are ranked in tenth position. This same situation is reproduced in the case of the global university rankings carried out in 2019 by the Centre for World University Rankings[10]. Of the 53 Spanish public universities that appear in this ranking, two Andalusian universities are among the top 10, that of Granada and Seville.

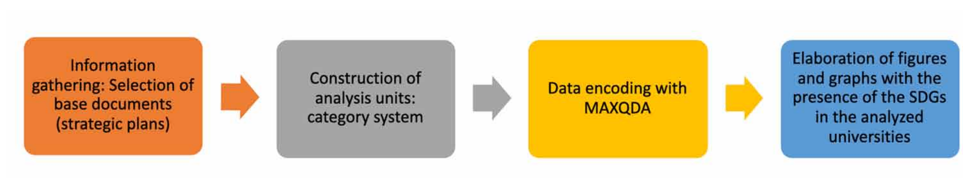
The Andalusian universities that are the object of this study are very committed to internationalization. Evidence of this, together with their presence in international mobility and networking programs, is the leadership of two of the five European alliances coordinated by Spanish universities and selected by the European Commission as *European Universities*; these two institutions are the University of Granada and the University of Cadiz.

Finally, and in relation to the topic of this study, we should note that all universities have implemented policies of equality, sustainability, sports, environmental quality, etc., and to a greater or lesser extent, they all have stable structures for the management of these policies within their governing bodies.

SDGs and Strategic Plans: Coding map

Figure 5 shows the process followed for the content analysis of the strategic documentation of the ten Andalusian universities; specifically, nine strategic plans, and an operational plan for the University of Granada.

Figure 5. Coding map elaboration process. Source: Prepared by the authors.



The theoretical contributions related to the key descriptors of strategic planning, together with a first reading of the selected documents, has enabled us to establish those categories to be analyzed: missions, visions, values, objectives and lines of action. A sixth category marks the transversality of the analysis and relates to the socio-corporate image projected by each university under study, based on the analyzed strategic plans. This categorizing has allowed us to determine the role played by this relevant aspect, such as disseminating and transferring the knowledge generated by each university in a sustainable and efficient way between the university community and the rest of the public, aligning the institution with its environment through the different platforms available for this purpose.

The following table (Table 4) defines these categories of analysis, in some cases using the same terms observed in the documentation analyzed:

The coding process has been carried out through the MAXQDA Program version 2020. Once the coding of the documents was completed, the first analytical approach to the data was to visualize their degree of presence in the SDGs by category and by university. As mentioned above, the categories of analysis are (mission, vision, values, objectives, corporate social image and lines of action). As subcategories we have used the 17 SDGs (Figure 4). The analysis of the most relevant results provides us with an insight into the level of commitment that universities have to include aspects related to sustainability in their governance models.

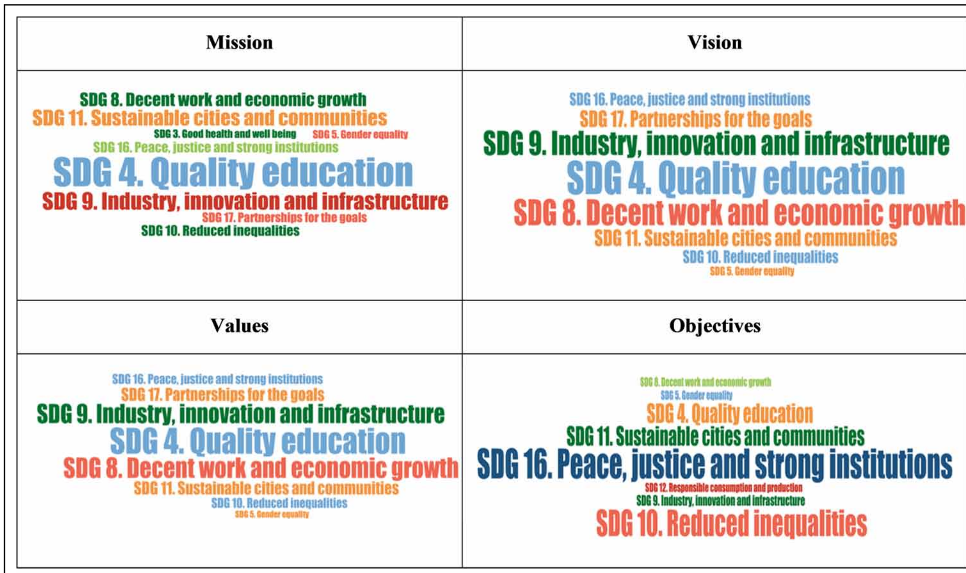
It should be noted that in a generic way, the SDGs that have the most presence in the documents analyzed, and therefore in Andalusian universities in the categories, mission and vision (Table 5), are SDG 4 (quality education), 8 (decent work and economic growth) and 9 (industry, innovation and infrastructure) since these are those that a priori relate the most to the teaching, research and innovation and management aspects that are fore fronted in current university models.

Table 4. Categories of analysis: Definition. Source: Prepared by the authors. Based on the information collected from the strategic plans.

Categories	Definition
Mission	It reflects the fundamental reason for being of each university. Through this category, universities consider responding to three key questions, who are they? What do they do? And what do they contribute to the educational community? (University of Cordoba, P. 6: 1644).
Vision	It is related to the approaches that universities make in the medium and long term. They consider the university model to which they aspire: where do they want to be in the future? (University of Cordoba, P. 6: 1911).
Values	Principles, beliefs and ways of acting that regulate the behaviour of universities. The values must reflect the identity of the organization and be the frame of reference to achieve what is stated in the rest of the categories (University of Jaen, P. 16: 1692).
Objectives	These express the goals to be achieved in order to achieve the future vision of the University derived from the strategic analysis (University of Jaen, P. 19: 182).
Corporate social image	In this category we focus on the search for guidelines, procedures to publicize both internally and externally the initiatives and projects that universities carry out or intend to implement as well as the model of university social responsibility that is transferred between university and citizenship.
Action Lines	General actions aimed at achieving strategic objectives. They can be considered intermediate objectives. (University of Jaen, P. 19: 428).

In addition to those mentioned above, SDG 10 (reduced inequalities) and 16 (peace, justice and strong institutions) make a great appearance in the categories for objectives and values, as can be seen in Table 5. In the present case, these SDGs are mostly related to the role played by universities within their environment.

Table 5. Most representative SDGs in each of the analysis categories. Source: Prepared by the authors



Next, we will detail the presence of the different SDGs for each university through the breakdown of information according to the different categories of analysis.

SDGs and Strategic Plans: Mission

When we talk about a university's mission, we are referring mainly to the contribution they make to the university's community and its environment; the role they play as an institution within society goes far beyond the education of the citizens of the future. In this category, we have been able to verify that Andalusian universities are committed to an educational model focused on various spheres, among which training, research, innovation and transfer stand out, and that their main objective is the transformation and progress of society, through transfer of knowledge, economic development, equal access and availability of resources and opportunities, and the sustainable development of the environment.

- *"Committed to the sustainable progress of its environment, with a vocation for international vocation and solidarity cooperation (…) that responds with quality, innovation, agility and flexibility to the emerging challenges of society in the different fields of science, technology, culture and the arts" (SDGs 4, 9, 11 & 17; International University of Andalusia: 12: 713 - 12: 1126).*
- *"Explicit commitment to the environment of its province reflected in its Statutes and through actions that have been building a socially responsible university with specific commitments in teaching, research, transfer, social, cultural, environmental and territorial matters" (SDG 4; University of Cadiz: 26: 1536 - 26: 1879).*
- *"High degree of social commitment that, through continuous improvement of teaching, research, transmission of culture and transfer of knowledge, aims to contribute to the progress of society and the sustainable development of its environment" (SDGs 4, 8, 9 10 and 11; University of Jaen: 15: 376 - 15: 754).*

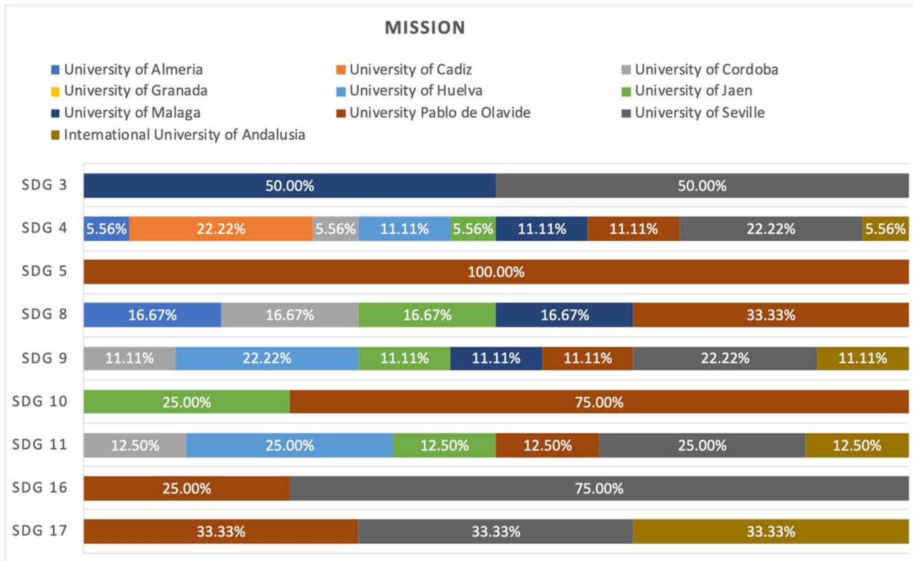
This shows that Andalusian universities are truly committed to, and are satisfactorily including aspects related to sustainability within the higher education field (e.g. Clover Program: initiative for the improvement and environmental recognition at the University of Córdoba; Mobility Program "Hack The City"-University of Jaen-; Islands and Green Paths and Smart-Campus Own Plan – University of Malaga- or Strategic plans aligned with the SDGs – University of Seville –) (Miñano and García-Haro, 2020). As we can see in Figure 6, the SDGs that have the most presence in the different universities analysed in the *mission* category are 4, 8, 9 and 11, as these SDGs appear in at least 5 different universities, compared to SDG 5, which only appears at the Pablo de Olavide University, or SDG 3, which appears to the same extent at the Universities of Almeria and Cordoba.

SDGs and Strategic Plans: Vision

In the Vision category, universities carry out introspective efforts where they reflect on the university model they intend to implement. In this sense, universities consider in the direction they want to go in and take necessary future steps to become the institution they aspire to become.

We have come across paragraphs where universities speak of their great social commitment, in search of fairer and more inclusive societies, which in turn are committed to internationalization, becoming places where meeting points are generated through forums and debates. Spaces where all members of

Figure 6. Presence of SDGs in the mission category. Source: Prepared by the authors.

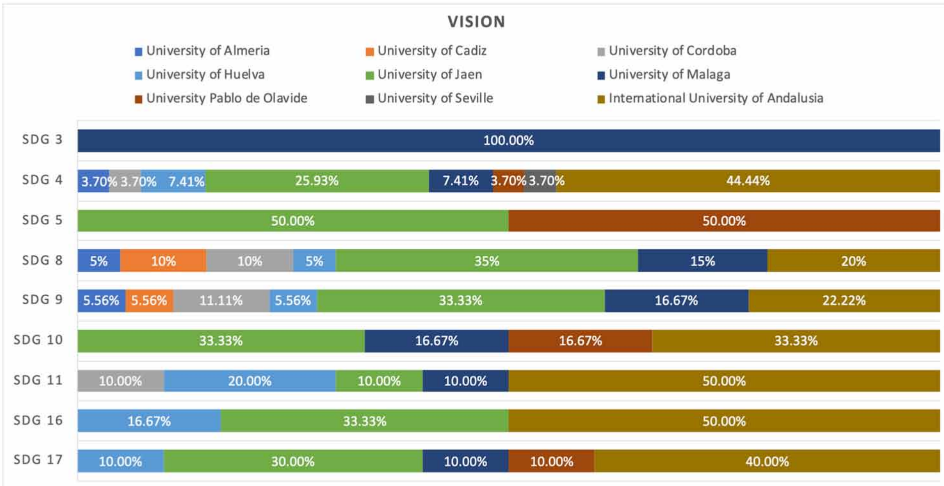


the community reflect on their actions to propose lines of action and achieve a higher quality of life that includes the principles of sustainability.

- *"Maintains a permanent commitment to social responsibility and, especially, to its actions in accessibility, equal opportunities, sustainability and international cooperation for development" (SDGs 5, 10, 11, 16 and 17; University of Jaen: 16: 1312 - 16: 1524).*
- *"A University for society, which promotes the dissemination of science and culture generated in the University, thereby contributing to economic growth and improving the quality of life" (SDGs 8 and 9; University of Malaga: 14: 753 - 14: 953).*
- *"University community capable of attracting and promoting talent to consolidate its leadership as a benchmark for transforming social commitment from its vocation of public service, contributing to the achievement of a more just, egalitarian and inclusive society. It will address the process of digital transformation in its administrative management processes and in its online teaching to configure itself as an internationalized university open to the world" (SDGs 4, 5, 10, 16 and 17; University Pablo de Olavide: 8: 813 - 8: 1307).*

As the analyzed text fragments and the percentages shown in Figure 7 highlight, the SDGs that are present in the vision that universities have are again 4, 8, 9 and 11. In this case, the SDG 17 is seen as an important point, proposed at universities such as the University of Jaen and the International University of Andalusia, showing a high concern for establishing ties with other institutions in order to achieve a more sustainable institution.

Figure 7. Presence of SDGs in the vision category. Source: Prepared by the authors.



SDGs and Strategic Plans: Values

When we speak of values, universities refer to the principles and beliefs that reflect their identity as an institution in their strategic plans. They are closely related to the previous categories since the values transmitted by a university are the basis of all the approaches that an institution must adopt when drawing up lines of action.

Below are a number of statements that highlight some of the values promulgated by Andalusian universities and their relationship with the different SDGs:

- *"Environmental awareness: UNIA is involved in preserving the environment by applying sustainability principles to its internal operations and the services it provides abroad, properly managing its resources and proposing lines of education and debate on Sustainability" (SDG 11; International University of Andalusia: 13: 350 - 13: 663).*
- *"Companies must encourage initiatives that promote greater environmental responsibility" (SDGs 6, 7, 11, 12 and 13; University of Huelva: 19: 907 - 19: 1000).*
- *"Protection of biodiversity: Our campus is unique and extraordinarily biodiverse. Awareness and respect for the environment guarantee the sustainability of a privileged natural environment, favoring its enjoyment by the entire university community" (SDGs 11, 12 and 15; University Pablo de Olavide: 9: 632 - 9: 1066).*

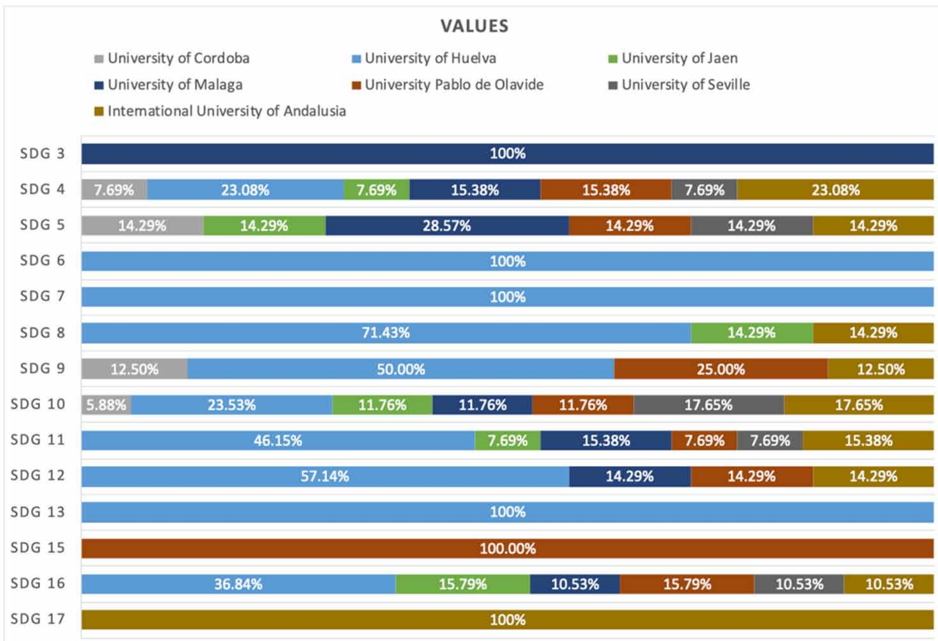
The selected quotes refer to values closely related to the commitment to sustainable development at tertiary institutions, as they highlight commitment to environmental awareness of the university community through the sustainable management of available resources and protection of the biodiversity of the nearby environment.

In addition, the universities are committed to values that support social justice, equal opportunities and put an end to discrimination of different kinds, as can be seen in the specific example selected from the University of Malaga, where the search for equity stands out.

Figure 8 shows us that the majority of the SDGs appear in the *values* category, except for 1 (no poverty) and 2 (zero hunger) which, although not explicitly, it can be intuited in some of the messages that are promulgated in the values that Andalusian universities carry as hallmark.

In this category, we can see that the University of Huelva is one of the universities that shows a greater number of SDGs in its strategic plan, including 10 of the 17 existing SDGs.

Figure 8. Presence of SDGs in the values category. Source: Prepared by the authors.



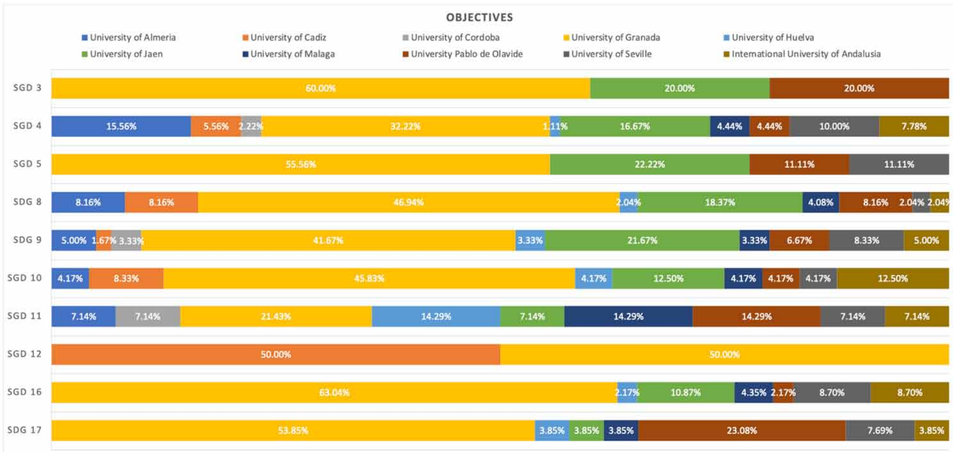
SDGs and Strategic Plans: Objectives

The strategic objectives constitute the route to be followed in order to achieve the mission, vision and values proposed by the different universities, establishing the strategy in which it will be carried out. This strategy is specified and transformed into the lines of action that we will present as the closing point of the analysis carried out.

Some of the objectives that are most related to sustainability in Andalusian universities have to do with:

- *"Improving the university community's commitment to sustainability and social responsibility" (SDG 11; University of Almeria: 43: 374 - 43: 475).*
- *"Managing resources efficiently and sustainably, seeking balanced development on each campus" (SDG 12; University of Cadiz: 43: 1443 - 43: 1562).*
- *"Developing the 2030 Agenda for the SDGs" (SDG 11; University of Granada: 78: 316 - 78: 366).*

Figure 9. Presence of SDGs in the objectives category. Source: Prepared by the authors.



As shown in the analysis carried out, the SDGs that have the most presence in the different universities are again SDGs 4, 8, 9, 10, 11, 16 and 17, since these are the SDGs that in principle have a closer relationship with teaching, innovation and research, as well as with equal opportunities and social justice (Figure 9).

Socio-corporate Image Projected by Andalusian Universities in Their Strategic Plans From the Perspective of Sustainability

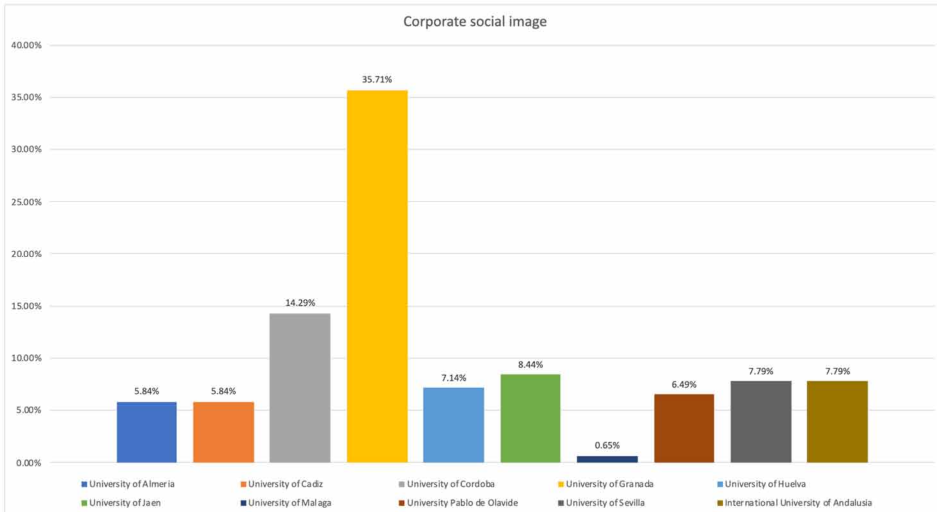
In previous sections, a disaggregated analysis has been carried out to verify the incorporation of aspects related to sustainability based on the mission, vision, values and objectives expressed by the universities in their strategic plans (and operational plans in the case of the University of Granada). At this point, we carried out a cross-sectional analysis of the documents based on the socio-corporate image that the universities project through the categories mentioned above, and on how the strategies they promote to improve and perfect the image shown to the community are also linked to the SDGs and the incorporation of sustainability across the different areas of competence.

Andalusian universities have a responsibility to society in regard to taking advantage of their potential to generate new channels that lead them to become universities open to their environment under the parameters of models that are committed to sustainability. We have been able to verify that some of these actions are aimed at the dissemination of the research reports they carry out, make visible those projects whose main axis is both teaching and research innovation or enhancing the presence on the network of open and accessible educational content. In addition to those discussed above, universities strive to create communication channels and share with the citizens the different resources and activities (educational, sports, cultural, heritage) that are promoted both internally and externally and in collaboration with other institutions.

Below are some of the measures that are manifested in the fragments of the strategic plans analyzed:

- *"Improve the visibility and results of research activities" (SDG 9; International University of Andalusia: 20: 1102 - 20: 1190).*

Figure 10. Presence of aspects related to the corporate social image. Source: Prepared by the authors.



- *"Deploy actions aimed at improving access to the services offered by the UAL from other countries in the teaching and research field" (SDGs 4 and 9; University of Almeria: 36: 1075 - 36: 1217).*
- *"Increase the dissemination of our institutional, scientific and cultural activity and improve the integration and coherence of the activities carried out" (SDGs 4, 9, 10 and 11; University of Granada: 119: 462 - 119: 624).*
- *"Create a two-way communication channel between the university and external agents" (SDG University of Seville: 35: 221 - 35: 302).*

It should be noted that the majority the SDGs are reflected in the socio-corporate image that universities want to emit to their environment, although it is true that the SDGs that appear to a greater extent, as happened in other categories, are SDG 4 (quality education), SDG 9 (industry, innovation and infrastructure), SDG 10 (reduced inequalities) and SDG 11 (replaceable cities and communities).

If we put aside the generalist approach and look instead at each university (Figure 10), after analyzing the documents, we can verify that the University of Granada gives greater importance to the socio-corporate image in a much more prominent way than the other institutions. In this case, it has 35.71% of codes that are related to measures aimed at the dissemination and visualization of activities and proposals made at an institutional level, while at the University of Malaga (0.65%), this is practically non-existent. This does not necessarily imply that these types of initiatives are not undertaken, but what is certain is that they do not have it reflected in their strategic plans within the key descriptors identified in the strategic plans under study here.

SOLUTIONS AND RECOMMENDATIONS

Based on what is detailed in the previous points, and although the SDGs are present in the priority lines established in the strategic policies of public universities in Andalusia, there is still a long way to go to achieve consolidation of governance models based on the principles of sustainability at these institutions.

All these universities face the challenge of addressing the 17 SDGs, although some to a greater extent than others, as can be seen in the map of SDGs that emerges from the content analysis of the ten strategic plans analyzed. A quality education based on the principles of education for sustainability, as well as strategies linked to innovation and the development of actions that favor decent work and economic growth, are some of the most significant SDGs (Figure 11).

Figure 11. Map of predominant SDGs in the action lines. Source: Prepared by the authors.

The consideration of the SDGs as proposals for action in order to propose solutions and strategic lines to address the challenge of sustainability is different in each of the Andalusian universities (Figure 12).

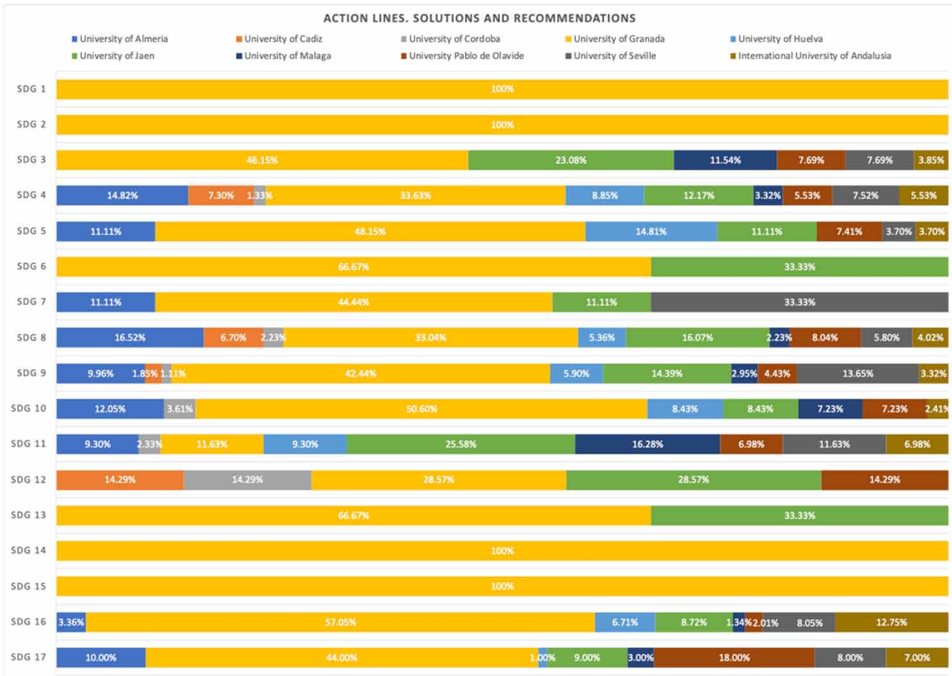
In general terms, the University of Granada has well defined solutions required in its operational plan, and proof of this is that it proposes action strategies for each SDG.

The other universities make recommendations related to SDG 4 (equality in education), 8 (decent work and economic growth) and 9 (industry, innovation and infrastructure). SDG 1 (end of poverty), 2 (zero hunger), 14 (underwater life) and 15 (life in terrestrial ecosystems) are not identified in the improvement proposals of these universities, with the exception of the University of Granada.

Among the solutions proposed by these universities are actions including:

- *"Analyzing the current situation of the University of Granada in relation to the goals established for each of the 17 SDGs" (SDG 4; University of Granada: p.79, 777).*
- *"Improving the interaction of the UCA with its environment, enriching the offers of services and activities for Stakeholders" (SDG 4; University of Cadiz: p.85:463).*
- *"Improving and managing the infrastructures of the University in an efficient and sustainable way" (SDG 9; University of Huelva p.70:1009).*

Figure 12. Presence of SDGs in the action lines. Solutions and recommendations. Source: Prepared by the authors.



FUTURE RESEARCH DIRECTIONS

Characterizing the presence of the sustainability perspective in the governance model of Andalusian universities and in their strategic planning through the analysis of their strategic plans has revealed the commitment of these institutions to sustainability and the SDGs, at least as far as the declaration of intent is concerned; however, it has also revealed certain weaknesses related to the unequal presence of these goals in the strategic policy of these universities. The analysis of the implementation of the commitments made in these plans, the degree of execution and achievement of the proposed actions, the actual involvement of the different groups and the evaluation of the adequacy of the proposed actions to achieve the committed objectives are lines of research that are opened with this exploratory study.

The extent to which the prism of sustainability and the SDGs are present in the monitoring and evaluation of the strategic and operational plans of these universities is another topic of interest, and as four of the Andalusian universities subject to this study are currently designing their new strategic plans, these issues are necessary to maintain sight of.

Likewise, it is important to continue analyzing the shortcomings and potential that universities have in relation to all the SDGs across the 4 axes that identify them (governance - teaching - research - transfer) (SDSN Australia/Pacific, 2017).

Ultimately, it is essential that universities continue to be spaces for reflection and debate where the university community, public and social institutions, as well as society in general, come together to show what lines to follow to work from a sustainable university model where the 17 SDGs are present.

CONCLUSION

The strategic plans of the universities are, without a doubt, presented as a declaration of the intentions that higher education institutions have across all the axes that identify them. The design of these strategic plans is, for universities, an ideal space to include aspects related to sustainability, enabling them to establish themselves as educational entities committed to education for sustainable development under the 2030 Agenda.

From this logic, their work, necessarily, must also be focused on responding to the diverse issues that lay outside their walls. They must act as a socio-educational reference and, from their corporate social responsibility, offer tools, strategies and actions to improve the reality of the current times.

From this perspective, universities obviously have a commitment to sustainability that involves incorporating concrete measures in their actions that comply with the international prescriptions established in the 2030 Agenda through the SDGs, with their strategic plans becoming the political documents that underpin this commitment.

There's no doubt that approaching university strategic planning from the perspective of sustainability involves very specific practices, such as:

1. the participatory and consensual design of the strategic plans within the university community, as well as their objectives, actions, and follow-up and achievement indicators;
2. the use of the SDGs as references on which the different actions pivot;
3. the commitment to a governance model that ensures the management of strategic plans based on traceability and transparency;
4. the on-going analysis of the utility, effectiveness, efficiency and relevance of said plans, or
5. the ability to anticipate changes to avoid arbitrariness in decisions.

The analysis of these strategic objectives prescribed across the Andalusian universities shows us that, despite these institutions being committed to, and satisfactorily including aspects related to sustainability within the higher education field, it is necessary to continue working towards sustainability. There is a long way to go and tertiary institutions are committed to pro-sustainable actions, in general terms, but there are still SDGs that need to be addressed in greater depth and awareness by these universities, thus making progress towards the implementation of more sustainable governance models.

It is worth noting that the majority of the SDGs, with the exception of 1 (no poverty) and 2 (zero hunger), are present in the declaration of the values pursued by Andalusian universities and the repeated presence of four of these goals (4, 8, 9 & 11) in the key descriptors of these strategic statements: Quality Education, Decent Work and Economic Growth, Industry, Innovation and Infrastructure, and Sustainable Cites and Communities.

On the other hand, all Andalusian universities are aware of the social responsibility they have in the context of reference, and they have stressed actions in their strategic objections that facilitate a socio-corporate projection in accordance with the knowledge, research and innovation that they generate and that facilitate the creation of alliances, networks and inter-institutional strengthening, helping to transfer knowledge to improve the quality of life of the entire community.

For universities, to be governed following a pro-sustainable governance model supported by a philosophy of social responsibility, is to arrive at that model of university excellence- a challenge and the end goal of any institution.

We consider it essential to continue evaluating the projection that, at a general level, universities have on citizens; the impact that the knowledge, research and innovation they generate has in the improvement of their context and the society that are part of. In this way, analyzing the channels of communication, dissemination and transfer of knowledge that are generated in these institutions is fundamental given the commitment and social responsibility that societies lend to universities (Sutrisno, 2019).

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KEY TERMS AND DEFINITIONS

Agenda 2030: Is a plan of action for people, planet and prosperity. It also seeks to strengthen universal peace in larger freedom. All countries and all stakeholders, acting in collaborative partnership, will implement this plan (United Nations, 2015).

Education for Sustainability: The sustainability concept leads us as humans to rethink how our way of life influences the environment and propose solutions that imply an improvement in the quality of life without degrading the environment. It is necessary to build a culture of sustainability, and a good vehicle for this is education for sustainability, which involves training for conscious action, whose objective is to learn to change, and which finds its best strategy in participation. in real projects of transformation and change. (Martínez Huerta, 2014). Education for sustainability implies generating work proposals and achieving social involvement and commitment to carry them out in a satisfactory way.

Governance-University Model: This concept makes mention of the exercise of political, economic, and administrative authority to direct higher education systems. It supposes the model that universities follow to organize themselves at the governmental and institutional management level from an internal and external perspective. Gutiérrez (2002) considers university governance as "a public management that concerns the institutional structure of political action, both of the government and of the actors of the university community and those of civil society; serve the expression of governance as a measure of the capacity of the university organization, with its special complexity, to relate to the environment on which it depends."

Mission-University: Is reason of being of the university. It synthesizes the main strategic purposes, as well as the essential values that should be known, understood, and shared by all the individuals that are part of the university community. As an institution, the university must answer the following questions to define its mission: Who are we? What do we do? Why and for what do we do what we do? Who do we do it for? How do we do it? (Strategic Plan University of Granada, 2006-2010).

Socio-Corporate Image: The new educational demands make the universities seriously consider what image they want to project to society. As they are institutions with a high social commitment, they must attend to the needs of the different interest groups to which they are directed. A good socio-corporate image will make the community have a positive predisposition towards the university as an institution. In addition to these aspects, universities must think about the best communication and dissemination channels to reach the community. In this way, they will be able to be in direct contact with society and show the results of the work that is carried out within the institution in order to create a university open to the environment.

Strategic Lines-University: The strategic lines are the means to achieve the strategic objectives set by the organization in a given time. Each line will lead to a series of actions that will make it possible to achieve the objectives set through the resources available by each university as well as the participation of the community.

Strategic Plan-University: It is defined as an instrument that helps universities to trace their trajectory, through processes of reflection and participation to design the objectives they propose to achieve. With the preparation of this document, the foundations are laid to establish the lines of action that will energize the institution in the coming years. In most cases, strategic plans are defined based on three key points: mission, vision, and values.

Sustainable Development Goals (SDGs): Represent a series of joint actions to end poverty, protect the planet and improve the lives and prospects of people around the world. They are integrated and indivisible and balance the three dimensions of sustainable development: the economic, social and environmental (United Nations, 2015). In 2015, all the Member States of the United Nations approved 17 Goals as part of the 2030 Agenda for Sustainable Development, which establishes a plan to achieve the Goals in 15 years.

Values-University: The values must reflect the identity of the university and become the frame of reference to achieve the purposes that the universities set for themselves when answering the questions derived from the mission and vision they intend to achieve.

Vision-University: The future of the organization in a period of given time. When there is conceptual clarity about what you want to build in the future, the ability to direct and running toward your achievement steadily. To realize the vision of the university, as an institution you must ask yourself the following questions: What and how do you want? We will be in the following years? What do we want to become? Who will we work for? How are we differentiate ourselves? What values will we respect? (Strategic Plan University of Granada, 2006-2010).

ENDNOTES

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