Advertising in Spain's Third Sector in 2023: an in-depth analysis

Radiografía de las campañas publicitarias del Tercer Sector en España en 2023

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Abstract:

The aim of the study was to analyse the representativeness of the Third Sector (TS) in television advertising in Spain during 2023. Using a descriptive quantitative analysis, 21,957 spots aired on Antena 3 and Telecinco were examined, of which 426 belonged to the TS. The results indicate that less than 2% of the spots aired correspond to TS organizations, with a higher concentration in January, February and December. Foundations and associations are the main advertisers, with ONCE standing out. The campaigns focus on fundraising and social awareness. It is concluded that, although the presence of the TS on television is limited, its communicative impact is significant, suggesting the need to explore new digital platforms to expand its reach.

Keywords:

Advertising campaigns; third sector; spots; television.

Resumen:

El estudio tiene como objetivo analizar la representatividad del Tercer Sector (TS) en la publicidad televisiva en España durante 2023. Utilizando un análisis cuantitativo descriptivo, se examinaron 21.957 spots emitidos en Antena 3 y Telecinco, de los cuales 426 pertenecían al TS. Los resultados indican que menos del 2% de los spots emitidos corresponden a organizaciones del TS, con una mayor concentración en enero, febrero y diciembre. Las fundaciones y asociaciones son los principales anunciantes, entre las que destaca la ONCE. Las campañas se centran en la captación de fondos y la concienciación social. Se concluye que, aunque la presencia del TS en televisión es limitada, su impacto comunicativo es significativo, lo que sugiere la necesidad de explorar nuevas plataformas digitales para ampliar su alcance.

Palabras clave:

Campañas publicitarias; tercer sector; spots; televisión.

1. Introduction

Researching Third Sector communication practices poses a major conceptual challenge, primarily due to ambiguities surrounding the sector's definition, scope, and core activities. Among the various theoretical approaches available, this analysis specifically focuses on the legal perspective. To establish a framework, we refer to the definition of Third Sector, or TS organisations offered by Balas (2012), which states the following:

> "[...] the concept is consistent with a definition provided in the book, *The Accounts of the Social Economy: The Third Sector in Spain* (García Delgado et *al.*, 2004), according to which all private-sector organisations that make these types of social resource allocations are considered Third Sector entities, as no private organisation outside the Third Sector makes such provisions: in short, capitalist firms do not operate without a profit motive. Therefore, this definition leaves no room for misunderstanding. Associations, foundations, and unique entities fit perfectly within this description. However, cooperatives, worker-owned companies, and mutual aid societies also make similar allocations, as do social integration enterprises and special employment centres (Balas, 2012, p. 58)."

In line with this approach, Article 2 of Law 43/2015, of October 9, also defines the Third Sector as follows:

> "Private entities that emerge from initiatives driven by citizen or societal engagement, under various frameworks, which are guided by the principles of solidarity and social participation, the pursuit of public-interest objectives on a non-profit basis, and the promotion and safeguarding of civil, economic, social, and cultural rights, especially those of vulnerable populations at risk of social exclusion" (2015, Sec. I. p. 94846).

Despite these definitions, the most well-known TS entities are non-governmental organizations (NGOs), in addition to non-governmental development organisations (NGDOs), as they generally have the most visibility as agents that channel aid to vulnerable groups. On the international stage, the Spanish Agency for International Development Cooperation (AECID) stands out as the primary institution for Spanish Cooperation, as well as the Coordinating Body of NGDOs (CONGD). The latter comprises nearly one hundred NGDOs and 17 regional coordinating bodies dedicated to international cooperation and humanitarian aid. Both the AECID and the CONGD represent the values and demands of the Third Sector with regard to society, public administration, and other external institutions (Pallarés-Renau, 2021).

While the *a priori* communication goals of TS entities are different from those of private organisations, both of them share many common features related to the means of achieving those objectives. The use of advertising and related channels typical of profit-driven organisations does not compromise the mission or values of TS entities; instead, it allows them to take advantage of strategies previously tested by other organisations (Herranz de la Casa, 2007).

As a form of persuasive communication, "social advertising", or "social cause advertising," should be viewed as a strategic tool used to serve the cause of which it was inspired, as it helps an organisation position and differentiate its offering from other entities in the same field. Furthermore, in a broad sense, social advertising plays a key role in raising awareness and fostering a positive attitude toward the cause it promotes (Rosario-Ubiera, 2014), making this tool extremely valuable for both individual organisations and the sector as a whole. Among the channels available to TS organisations for communicating with their audiences, broadcast television is an ideal medium for raising awareness and sensitivity to causes due to its widespread coverage.

The main objective of this research is to analyse the share of TS advertising among the entire landscape of general-interest television (TV). The study is based on exploring commercials aired on Spain's major general-interest channels during 2023, which is expected to provide information regarding the emphasis that organisations in this sector place on TV advertising as a strategic communication tool. To this end, the following research questions are posed:

P1. What percentage of the total number of adverts broadcast on Antena 3 and Telecinco in 2023 were placed by the Third Sector?

P2. Are there any differences based the channel or month in question that might reveal any preferences of these advertisers?

P3. What types of organisations in this sector broadcast TV commercials, and how significant are they as advertisers?

P4. Who are the largest advertisers from the third sector in mainstream TV advertising?

P5. What is the communication objective of TS advertising campaigns?

P6. What are the profiles of the people featured in the adverts?

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After addressing these questions, the aim was to classify and analyse the content of the pieces in order to provide quantitative and qualitative data on the messages conveyed by the NGOs through their adverts. This enabled the authors to perform an assessment, draw conclusions, and outline a discussion regarding the differentiation and effectiveness of the messages.

1.1. Social advertising

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Starting in the second half of the 20th century, NGOs became agents of social change and advocacy, playing a significant role in the social, political, and economic domains. Thus, they started to raise people's awareness, disseminate information, highlight issues, and provide education through communication strategies, one of which is the "spot" in traditional TV advertising. However, as pointed out by Vidal Climent as early as 2004, the problem is that TS advertising needs to become more professional in terms of its objectives, creativity, and effectiveness (Vidal Climent, 2004).

Researchers such as Austin (1962, pp. 45-46) and Costa (1995, p. 38) use the word "action" to point out the social power of advertising. Austin calls it the "performativity of language" (to say is to do), while Costa refers to it as "the sum of Action + Communication" (we do, and we communicate what we do). Both authors argue that all communication is an action in itself, which implies a previous commitment to engage in both transmission and reception, in that order. Based on this concept, Nos-Aldás (2019, p. 59) explores the specific characteristics of social cause advertising and proposes three levels of its discourse:

Level 1. The concept of reality expressed through a specific work of creativity that represents that reality.

Level 2. That reality gives rise to relationships with and among groups.

Level 3. Those relationships trigger reactions, or elicited commitments.

These levels reveal the attitudes of social cause advertisers, their true objectives, and their understanding or implementation of responsibility related to the adverts they produce.

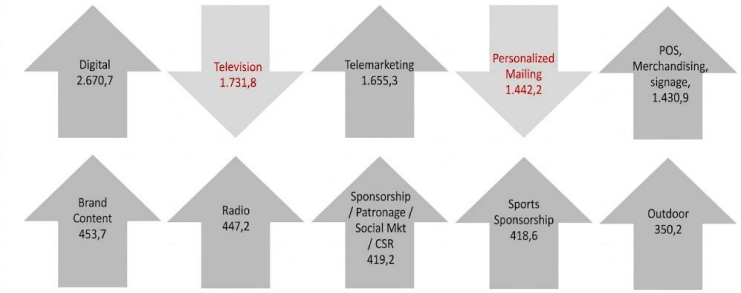
As early as 2005, Alvarado-López was already describing social cause advertising as an emerging form of persuasive communication that was destined to play an essential role in capitalism. He comments as follows:

> "Social cause advertising is considered persuasive communication; in other words, it is a type of communication that is convincing, paid, intentional, and self-serving. Through various advertising media it endorses specific social causes. Consequently, social cause advertising sets non-commercial objectives for itself in order to contribute to social and/or human development, whether in the short or long term, which may or may not form part of programmes aimed at effecting social change and raising awareness. At first glance, the most distinctive feature of this definition is its concluding part, which refers to advertising that supports social causes, sets non-commercial objectives for itself, and seeks to contribute to social development" (Alvarado-López, 2005, p. 266).

Much like commercial advertising aimed at promoting goods and services, television exposure remains vital for Third Sector organisations, given the media's undeniable power to convey their social message (Rubio-Romero et al., 2022). Consequently, such organisations can be regarded as major advertisers and key players who contribute to the overall investment trend among prominent TV advertisers. However, in the case of Spain, leading sources in the Spanish advertising sector have noted that this investment is on a downward trend (Infoadex, 2024).

According to Infoadex (2024), by June of 2023, expenditures on TV advertising in Spain had fallen by 3.7% compared to 2022 (Figure 1).

Figure 1. Investment ranking by media (€ millions)



Source: Created by the authors based on data from Infoadex (2023)

Regarding the issue at hand, the fact that ONCE (national organisation of the blind in Spain) was the sixth-largest advertiser in Spain in 2023 is striking. Unlike Vodafone, Samsung, and El Corte Inglés, major advertisers who significantly reduced their investment in television adverts compared to the previous year, the ONCE Foundation actually increased spending on TV advertising by 10.8%, which rose from 44.2 million euros to 49 million (Figure 2).

Figure 2. Expenditure on spots by each advertiser

No.	Advertiser	2022	2021	% change
1	L'oreal España, S.A.	70.9	72.9	-2.7%
2	Orange Espagne, S.A.	61.5	59.5	3.3%
3	Procter & Gamble España, S.A.	56.3	66.6	-15.6%
4	Telefonica, S.A.U.	51.9	48.8	6.3%
5	Linea Directa Aseguradora, S.A.	51.0	53.4	-4.5%
6	Organización Nacional Ciegos España	49.0	44.2	10.8%
7	El Corte Inglés, S.A.	45.6	50.5	-9.6%
8	Psa Automoviles Comer. España, S.A.	43.9	38.0	15.7%
9	Volkswagen Group España Distr., S.A.	42.3	46.2	-8.5%

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No.	Advertiser	2022	2021	% change
10	Vodafone España, S.A.U.	40.9	55.3	-26.0%
11	Securitas Direct España, S.A.U.	40.9	34. 9	17.1%
12	Mutua Madrileña Automovilista, S.A.	40.1	40.7	-1.4%
13	Cia. Serv. Beb. Refresc. Sl (Coca Cola)	38.0	39.1	-2.9%
14	Amazon Eu Sarl Sucursal En España	36.6	35.0	4.3%
15	Renault España Comercial, S.A.	32.2	29.2	10.5%
16	The Walt Disney Company Iberia, S.L.	31.9	24.4	30.7%
17	Samsung Electronic Iberia, S.A.	31.2	42.6	-26.8%
18	Lidl Supermercados, S.A.U.	25.8	26.0	-0.9%
19	Burger King Spain, S.L.	25.5	21.0	21.1%
20	Mc Donald's Sistemas De España, S.A.	24.2	21.2	13.9%

Source: Infoadex (2023)

However, case studies on the communication strategy of ONCE highlight a decline in youth engagement, as well as a deficit in social media dialogue with younger audiences, and a lack of emotional connection with the general public (Romero et al., 2022). Moreover, this situation is widespread among other high-profile NGOs such as Médicos sin Fronteras [doctors without borders], the Spanish Red Cross, UNICEF, Cáritas, UNHCR, Greenpeace Spain, Save the Children, Manos Unidas [joined hands], and Aldeas Infantiles [children's villages]. Although these organisations are still regarded by society as highly influential agents on the world stage, they fail to capitalise on the opportunity to act as formidable news organisations on social media, resulting in a missed opportunity to increase their followers, supporters, members, and volunteers (Claro Montes et al., 2023; Pallarés-Renau et al., 2022 and Pallarés-Renau et al., 2023).

There is a large body of literature suggesting that the apparent antagonism between traditional and social media advertising should instead be seen as complementary (Arano Uría, 2021), or that the creative approaches of both environments should be adapted to the new ways in which different audiences perceive contemporary advertising in transmedia environments (Scolari, 2013). Today, every media organisation is digitised and fully integrated into their social media platform. Consequently, the global digital landscape requires content adaptation, especially for large multinationals, including NGOs, who need to reach massive audiences. To broaden their scope, traditional and social media need to mutually reinforce each other (Arano Uría, 2021).

1.2. Advertising effectiveness and creative strategies in the Third Sector

To determine the effectiveness of advertising, a goal must be set in terms of its expected impact on the mind of the audience. This desired effect is the objective, a quantifiable target that can be related to any of the following: sales performance, purchase motivation, the level achieved in *top-of-mind* awareness, advertising recall, satisfaction surveys, audience exposure, and so on (Baskin, 2020). The key issue regarding the effectiveness of advertising by TS organisations is how to formulate objectives which, in most cases, must combine fundraising requirements with the need to raise awareness. However, this has more to do with the nature of the organisation itself than with the "product" it sells. Therefore, the communicative goal of ad campaigns carried out by these organisations becomes a *meta objective* that transcends the standard briefing of both private (corporate) and institutional (public sector) advertisers.

According to Rhodes (1961, pp. 305–310), creativity "is the process of reorganising, articulating, and systemising knowledge so that others can understand it (...) this is a phenomenon that has more to do with a way of feeling than thinking". An approach to the concept of advertising creativity inspired by Rhodes would be interdisciplinary, and in the Third Sector would depend to a greater extent on the accountability of the organisation's activities being advertised. Moreover, the act of "creative thinking" should not be a mechanical process. The idea is the fundamental pillar. This is the key concept of a campaign or advertisement, which is designed to capture the audience's attention and carve out a lasting place in the consumer's mind. As stated by Wells et al. (2007, p. 6), "The word 'creative' describes a critical aspect of advertising that drives the entire field". Furthermore, this aspect is especially decisive in social cause advertising.

As stated in the definition of NGO advertising and communication effectiveness offered by Nos-Aldás and Al-Najjar-Trujillo (2022), a message is effective when it addresses transformative objectives that improve the structures and narratives that shape the long-term relationship between these organisations and their audiences. This approach goes beyond the assumptions of previous decades, which pitted rational against emotional arguments regarding the decision of whether to donate money after watching an NGO advert; instead, the new strategy focuses more on motivating the audience to transform reality based on the impact of TS communication. In most of the literature consulted, the prevailing view that persists is that the audience for NGO advertising campaigns prefers to donate money to causes focused on specific, narrowly defined objectives with a highly targeted impact, as previously affirmed by Martínez-Sánchez (1998, p. 82).

Finally, in examining the meaning of "advertising effectiveness" in the creative content of NGO messages, it seems that the communication efforts of large companies, which are aimed at promoting new corporate objectives linked to social issues, are the direct competitors of these same NGOs. Thus, briefings from private companies have been found, which are described by Breva and Balado as follows:

> "[...] their aim is to ensure that creativity is infused with corporate social responsibility, and that all their audiences, both internal and external, are able to understand their strategy and feel that there is a social commitment behind the brand. Therefore, this leads the authors to suggest the presence of a growing trend among companies toward adopting the NGO's mission. However, it might be more accurate to say that the two types of organisations share objectives and concerns, albeit with different aims" (Breva and Balado, 2023, p. 104).

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2. Method

This study aims to examine the share of third sector television advertising on the most prominent Spanish TV channels during 2023. The objective is to understand the strategic importance that third sector organisations place on transmitting their messages through television adverts. To this end, the following specific objectives are set forth:

SO1. Quantify and identify TS adverts based on the channel and month in which they appear to identify possible differences.

SO2. Classify the types of third sector organisations that use television advertising and analyse their importance as advertisers.

SO3. Identify the main TS advertisers on generalist TV.

SO4. Analyse the communicative objectives of TS advertising campaigns.

SO5. Examine the profiles of the protagonists featured in TS adverts.

To achieve the objectives, a descriptive, quantitative analysis was carried out, which provides a controlled, outcome-focused measurement of a confirmatory, inferential, and deductive nature, offering a snapshot of reality (Malhotra, 2016) regarding third sector advertising expenditure. The scope of this study comprises 21,957 adverts broadcast on Spanish television during prime-time slots (mornings 10am–1pm, afternoons 4pm–7pm, and evenings 8pm–11pm). The spots appeared on Antena 3 and Telecinco during most of 2023 (July and August were excluded). The selection was based on the categorisation established by Infoadex (2023). This classification was used to analyse TV advertising expenditure on the most heavily-watched, general-interest channels in Spain, which belong to the country's two main media groups: Atresmedia and Mediaset España. Moreover, the selection prioritises analytical relevance over statistical representativeness, excluding periods of unusual programming in order to ensure the stability of the content observed, given that the summer television lineup has less linearity and consistency.

Infoadex is the benchmark for quantitative and qualitative data on advertising activity in Spain. Based on their metrics, this study focuses exclusively on television. Although digital platforms have gained ground in recent years, television remains a key medium for Spanish NGOs. Other communication channels were excluded due to their limited share within the total volume of broadcast advertisements.

From the initial population, a final study sample of 426 spots from third sector organisations was selected, which represents a significant reduction from the broader sampling frame. This decrease is due to two main factors: the first is related to the removal of duplicate entries using the unique CODVERSIÓN codes assigned by Infoadex (2024); the second factor involves the filtering and selection of advertisements specifically broadcast by TS organisations.

Following the quota sampling, which ensures that it mirrors the distribution of characteristics and establishes homogeneity within the generalised group (Polit and Hungler, 2000), all the adverts were reviewed to verify the validity of the items that comprised the sample. Next, the analytical variables of the study were defined as follows:

1. Share of third-sector advertisements compared to the total television sample.
2. Distribution of adverts based on the channel and month in which the spots appeared.
3. Classification of advertising organisations according to their legal structure, scope of activity, and geographic range.

4. Identification of TS advertisers.
5. Communication objectives guiding third-sector adverts.
6. Predominant profile of the main characters in the TS advertisements.

The five coding criteria applied to the variables analysed are as follows:

Organisational Structure: When organisations were coded according to their legal configuration, the classification established by the Fundación Lealtad (2022) was applied. This framework categorises third-sector entities into three distinct types: foundations, associations, and federations or confederations.

Type of organisation: Based on the area of activity, this variable was coded in accordance with the Fundación Lealtad (2022) taxonomy, which classifies a TS organisation's primary domain into six categories: social action, environmental engagement, cooperation for development, humanitarian aid, research, and cultural activities.

Geographic scope of the organisations: grouped as either national or international.

Communication Objectives: The main purpose of each TS advert was categorised into four areas: commercial (product sales); corporate (conveying brand image and building institutional reputation); fundraising (securing funds, recruiting members, and attracting volunteers); and raising awareness (heightening the public's understanding of a social issue and increasing its visibility).

Protagonist Profiles: To analyse the main characters featured in the advertisements, the TS audience classification by Cerezo Prieto et al. (2022) was employed. This model distinguishes among the following 12 distinct profiles: management, staff and volunteers, members and contributors, donors and participants, beneficiaries, suppliers and creditors, competitors, governments, TS experts, opinion leaders, the media, and civil society.

To examine the study variables, a content analysis was applied to the sample of advertisements. As Kerlinger (1986) notes, this methodology enables a systematic, objective, and quantitative examination of communication content. The analysis process was conducted using a structured results matrix organised around the sample of advertisements and the six analytical variables. This framework enabled the data to be arranged in strict accordance with the coding criteria established by the research team.

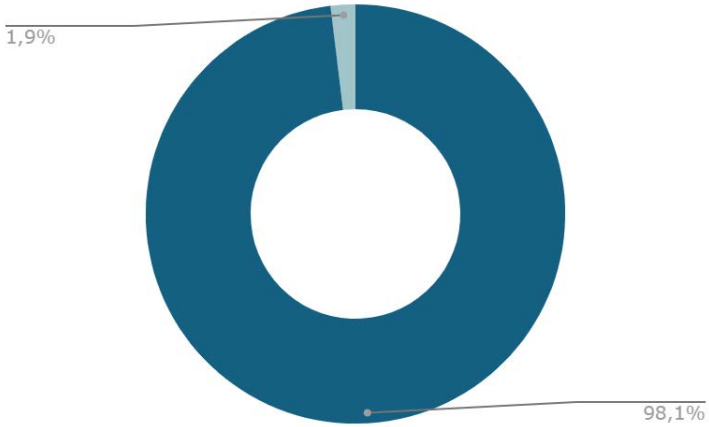
3. Results

An analysis of the results shows that less than 2% of all adverts broadcast on Antena 3 and Telecinco in 2023 were placed by TS organisations (Figure 3). The number of these adverts was 426, compared with a total of 21,957 for the entire year 2023. While the figure of 426 might seem low, the monetary investment is considerable.

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Figure 3. Percentage of adverts placed by TS organisations compared to the total number of spots broadcast on Antena 3 and Telecinco in 2023



Source: Created by the authors.

Regarding the distribution of TS advertising, no differences are discernible regarding the two TV broadcasters, nor the timing. The adverts are divided almost equally between the two main generalist channels, with 48.4% on Antena 3 and 51.6% on Telecinco. In terms of distribution timing throughout the year, the months with the highest concentration of adverts by TS organisations were September, December, January, and February (Table 1). However, this differs from the overall monthly volume of spots, as the months with the highest concentration are those from June to December, while January and February generally have the lowest advertising share. In other words, except for December, there were more adverts from TS organisations on television during the two months of the year when the least amount of total advertising was broadcast.

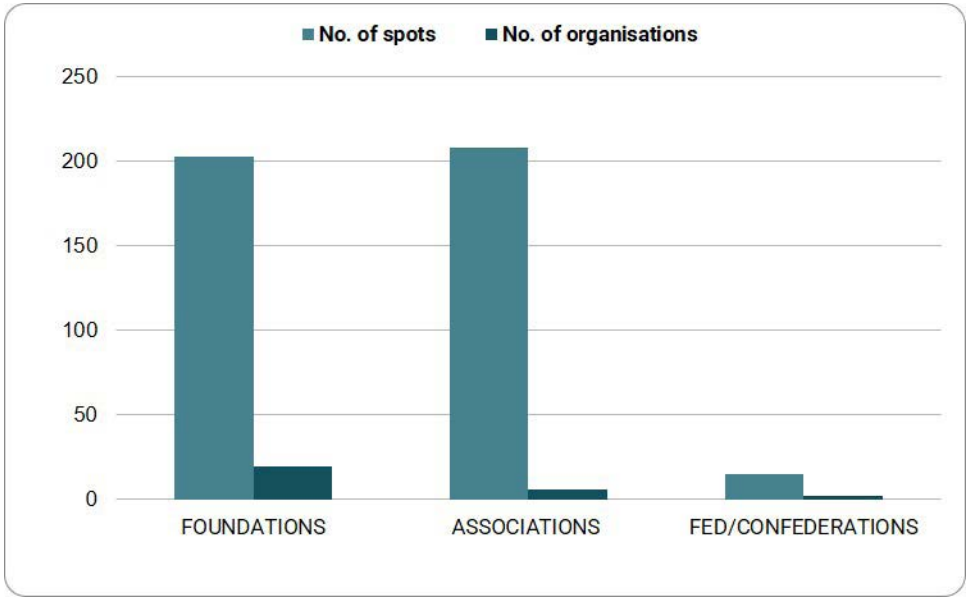
Table 1. Adverts by TS organisations by month vs. the total number of adverts broadcast

	January	February	March	April	May	June	Sept	Oct	Nov	Dec
TOTAL	1,677	1,885	1,986	2,121	1,848	2,270	2,470	2,729	2,468	2,503
TS	62	59	16	25	37	29	51	45	38	64

Source: Created by the authors

Looking closely at the types of entities that place adverts, more than 70% of all TS organisations that advertise on TV are foundations. However, the largest number of spots broadcast each year is attributed to associations (Figure 4).

Figure 4. Number of adverts attributed to each type of TS organisation



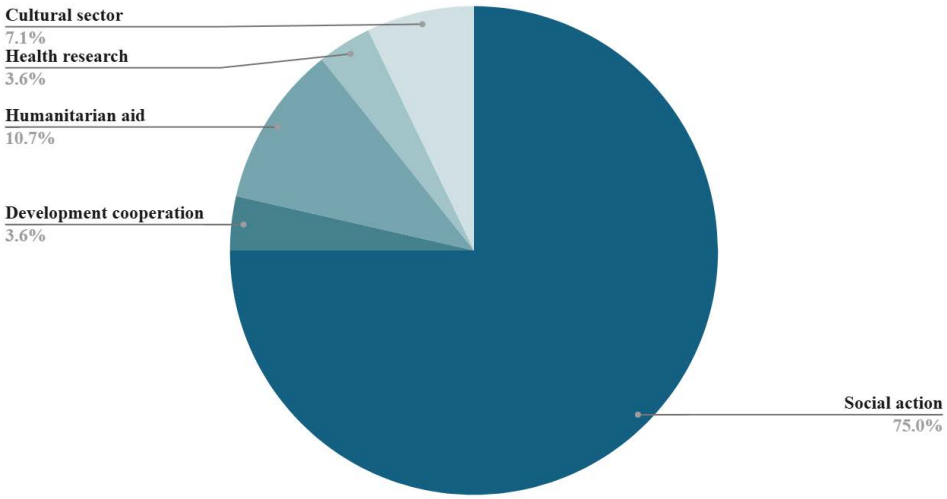
Source: Created by the authors

Regarding the range of advertiser activity, 75% of the non-profit entities that advertise on TV focus primarily on social action. This figure is significant both in terms of quantity and scope, highlighting the importance of advertising for organisations working on social projects. The second most common focus, though considerably behind, is that of TS entities who operate in the field of humanitarian aid (10.7%); the third position is held by organisations in the cultural sector (7.1%); the rest comprise the fields of health research (3.6%) and development cooperation (3.6%), which account for a minor share of advertising on television (Figure 5). To conclude the section on the types of TS entities that advertise on television, more than 85% operate at the national level.

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Figure 5. Key areas of TS advertisers



Source: Created by the authors

Regarding the third sector advertisers who hold the two highest positions, ONCE Foundation (the National Organisation for the Blind in Spain) clearly holds first place, with four times as many adverts as the second-largest advertiser in the sector, Save the Children (Table 2). Other prominent advertisers include the following: three foundations affiliated with major organisations, which include the ONCE, Mapfre, and Atresmedia Foundations; three international organisations comprised of Save the Children, Ayuda en Acción [help in action], and UNICEF; two national associations, which are the Asociación Española de Fundraising [the Spanish fundraising association] and the association known as Proyecto Hombre [humankind project]; and one national confederation known as the Confederación Autismo España [the Spanish autism confederation].

Table 2. Top ten third sector advertisers on mainstream television in 2023

ADVERTISER	No. of spots
ONCE	174
Save the Children	43
Ayuda en Acción	27
Fundación MAPFRE	26
UNICEF	21
Fundación ONCE	19
Asociación. Española de Fundraising	14
Confederación Autismo España	13
Asociación Proyecto Hombre	12
Fundación Atresmedia	11

Source: Created by the authors

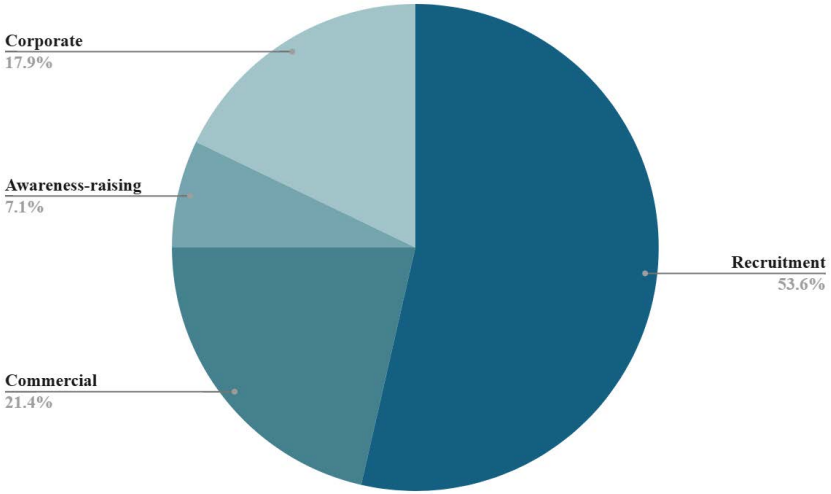
After analysing the communication objectives of the TS advertising campaigns, fundraising and member/volunteer recruitment stand out as the main reasons why these organisations engage in this type of promotion (Figure 6). Within these categories, campaigns aimed at soliciting donations stand out at 50%; recruiting members holds second place, comprising 13% of the campaigns; and recruiting volunteers has a minor proportion at 2%.

As for other objectives, it bears mentioning that the least favoured is raising awareness of social issues, which stands at 7.1%, while commercial or sales-related goals, including campaigns aimed at selling an organisation's products or services, account for a considerable share at 21.4%. However, it is striking that fully 100% of the campaigns with a commercial objective are exclusively run by ONCE, which are aimed at the sale of charitable lottery tickets. As for adverts aimed at strengthening the image of these organisations (i.e. the corporate objective), these account for 17.9% of the adverts analysed.

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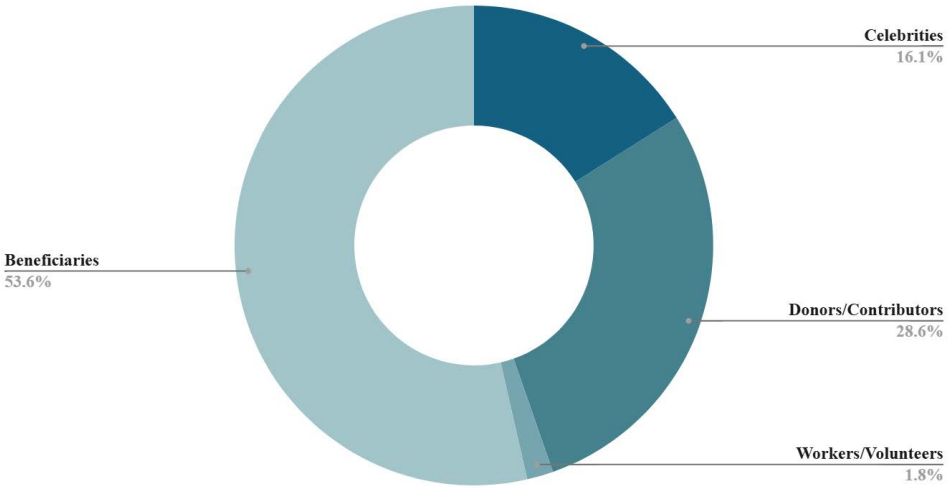
Figure 6. Communication objectives of the TS adverts



Source: Created by the authors

Finally, the role of the protagonists in the adverts bears mentioning, as well as the types of profiles that are dominant. While the advertisements commonly feature a variety of profiles, the present study has focused on analysing the main characters, or those around whom the narrative and creative focus of the adverts revolve, as they are considered the most relevant factor in connecting with the target audience of each campaign. The beneficiaries of the organisations are the protagonists of the adverts, followed by donors and supporters (Figure 7). However, the meagre attention given to staff and volunteers in TS adverts is a bit disturbing, as this role is played by celebrities instead. However, this strategy is a common marketing tool in a wide range of sectors, even in campaigns run by organisations that are not NGOs.

Figure 7. Profiles of the protagonists in the TS adverts



Source: Created by the authors

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4. Discussion

The advertisements addressed in this study were broadcast in 2023 on the most widely-viewed, general-interest TV channels in Spain, which are Telecinco and Antena 3. Overall, the results indicate that these adverts diverge significantly from the ideal of advertising effectiveness in social cause communication, which is generally defined by the ability to mobilise society in order to correct unjust situations, as proposed by Alvarado-López (2005) and Nos-Aldás and Al-Najjar-Trujillo (2022), respectively. Furthermore, as their primary objectives are fundraising, membership growth, and volunteer recruitment, the adverts analysed can be classified as social marketing; in other words, the commercial objective dominates, while the goal of social transformation is sidelined, despite the fact that most of the organisations operate in the third sector.

In terms of content, the spots prioritise social action over topics such as development cooperation, environmental initiatives, and health research. They are focused on specific areas of action, thereby coinciding with the proclivities of donors who, as pointed out by Martínez-Sánchez (1998), prefer to support concrete, targeted causes.

The beneficiaries of these initiatives are the protagonists of the adverts, thereby adding significant emotional weight by highlighting unfair social conditions. Nevertheless, despite the fact that volunteers and staff are able to enrich the narrative with their views on commitment and action, their presence is minimal. Moreover, in adverts featuring staff, volunteers, donors, and supporters, they are mostly middle-aged women and men, so a potential connection with the youth segment is lost, as young people are generally not represented in these campaigns. Moreover, this finding is consistent with data presented by

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various authors (Claro Montes et al., 2023; Rubio-Romero et al., 2022), who had previously highlighted a decline in youth engagement.

The authors also observed excessive uniformity in the denotative approach of these advertisements. By focusing strictly on the factual description of their actions, the campaigns relegate the connotative, emotional dimension to the background. This lack of differentiation hinders brand distinction and reduces the impact of their initiatives, which is consistent with previous findings by Rubio-Pinilla and Candón-Mena (2021). Furthermore, neither denotative nor connotative advertising, nor a combination of the two, has achieved optimal levels of narrative impact. This weakness suggests that the traditional television format may not be the most suitable channel for raising funds nor promoting significant social change in the current context. Moreover, the use of other channels to achieve these objectives may be more effective, as suggested by previous studies (Arano Uría, 2021; Baraybar, 2009; Claro Montes et al., 2023; Herranz de la Casa, 2007).

Based on the findings, the authors suggest rethinking creative strategies so that messages not only seek to raise funds, but actively engage citizens in public debate and mobilise society toward positive change. Messages should also be designed to reinforce the unique identity of each NGO, thereby overcoming the homogeneity detected and emphasising the transformative purpose of each organisation. Therefore, the authors recommend implementing evaluation systems capable of measuring the impact of television content and social media messages on public opinion and citizen engagement (Miquel-Segarra et al., 2021). After all, advertisers in other sectors have such appraisal systems, which assist in refining their strategies and ensuring long-term communication effectiveness.

5. Conclusions

This analysis of adverts broadcast on Spain's major, general-interest TV channels in 2023 has enabled the authors to make a comprehensive assessment of the share of third sector advertising on television, and to answer the research questions posed.

Firstly, the data reveal that the Third Sector accounts for a miniscule percentage of general-interest advertising (Q1), with TS adverts comprising merely 2% of the total number of adverts broadcast in 2023. Nevertheless, major organisations in the sector continue using TV spots as an advertising format and, consequently, as a tool of their communication strategy.

Regarding an itemisation by month and channel (Q2), the results indicate that the periods of highest advertising activity are January and February, when rates are more affordable due to less saturation. December is also strong, coinciding with the Christmas campaign, when emotional adverts find a breeding ground that resonates with the audience. This indicates that at least in theory, campaigns aimed at raising social awareness are more effective. Furthermore, no significant differences were observed between Antena 3 and Telecinco, suggesting a balanced broadcast strategy.

As for the types of organisations that advertise (Q3), foundations are the most prominent, representing over 70% of the total. Regarding activity, social action is the dominant area at 75% for the main TS entities. Looking specifically at the sector's largest individual advertisers (Q4), the ONCE Foundation (National Organisation of the Blind in Spain) holds a massive lead, accounting for 44% of all the TS adverts analysed. This leading position is driven by two main factors: the first is related to a long-standing advertising strategy developed since the 1980s in partnership with the Contrapunto agency; the second factor

involves the need to market a wide range of gambling and lottery products, including lottery tickets, scratch cards, big-prize tickets, and more. ONCE is the leading third sector advertiser according to variables such as advertising frequency (number of ad placements), timing, and total investment. However, despite its creative approach, which is noteworthy, both ONCE and other major organisations in the sector must improve their social media dialogue in order to make a better emotional connection with diverse audiences.

Regarding advertising campaign objectives (Q5), third sector spots primarily focus on fundraising and recruiting members or volunteers. Conversely, adverts dedicated to raising social awareness account for a mere 7.1%, highlighting the Third Sector's limited use of advertising as a tool for social change. Finally, in analysing the protagonists' profiles (Q6), the authors discovered that organisational beneficiaries anchor the narrative in these advertisements. Additionally, the strategic use of celebrities helps to boost campaign visibility, which reflects standard practices found in commercial advertising.

In summary, the results clearly indicate that the share of television advertising by the third sector is limited in both volume and message diversity. However, the study also reveals that TS organisations use this instrument strategically to strengthen their institutional image and raise funds, rather than using it to raise social awareness.

One limitation of this study is its exclusive focus on television, which restricts the analysis to a traditional media environment. While this approach offers an in-depth understanding of television as a primary medium, it highlights the need to expand future research into interactive channels. Consequently, future studies should explore emerging audiovisual platforms such as TikTok and Twitch, in addition to promoting YouTube channels, all of which offer the opportunity to create viral content and connect with young audiences. The authors also recommend delving into the possible incorporation of digital formats such as memes and content streaming into the communication strategies of NGOs. By using Twitch as a model, where live radio broadcasts generate clips that are later shared on YouTube, a dynamic, viral communication framework could be created, which might significantly boost the reach of messages, as well as the connection with young audiences.

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Data collection and analysis	Sonia-Aránzazu Ferruz González, Estrella Barrio-Fraile, Lorena López-Font, María Pallarés-Renau
Discussion and conclusions	Sonia-Aránzazu Ferruz González, Estrella Barrio-Fraile, Lorena López-Font
Writing, formatting, and revision	Sonia-Aránzazu Ferruz González, Estrella Barrio-Fraile, Lorena López-Font, María Pallarés-Renau

8. Conflict of interest

The authors declare that there is no conflict of interest in any part of this research.

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