

# Communication consultancies in Catalonia: 25 years creation spaces for dialogue

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## *Las consultoras de comunicación en Cataluña: 25 años de creación de espacios para el diálogo*

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### **Abstract:**

Public relations consultancy firms started to appear in Spain more than half a century ago. The first public relations (PR) agency was set up in November 1960: It was called the Public Limited Company of Public Relations (Sociedad Anónima Española de Relaciones Públicas – SAE de RP), located in Barcelona. However, economic and political circumstances did not allow for full development of the services of these agencies until the 1990s. In recent years, however, the economic crisis seems to have affected the rate of growth. Faced with this reality, the present study addresses the evolution of PR agencies in Catalonia over the last 25 years, after taking a brief historical tour of its origins. The objective of this study is to analyze the development of communication consultancies based in Catalonia over the last 25 years in order to contribute to the knowledge base regarding the history and nature of this discipline within the geographical area where it began. To carry out this research, a survey of ten questions related to the historical development of agencies in Catalonia was developed, and this questionnaire was sent to nearly 60 companies from May 2014 to May 2015. The results confirm the fact that despite the crisis, new agencies have emerged in the sector. In addition, there has been a development in the area of digital PR and a preference for the use of the term "communication" rather than "public relations".

### **Keywords:**

Public relations; communication agencies; history of public relations; strategic communication; Catalonia.

### **Resumen:**

*Las consultoras de comunicación comenzaron en España hace más de medio siglo. En noviembre de 1960 nació la primera agencia de relaciones públicas (RP): Sociedad Anónima Española de Relaciones Públicas (S.A.E. de RP) en Barcelona. Sin embargo, las circunstancias económicas y políticas no permitieron el pleno desarrollo de los servicios de las agencias hasta la década 1990. En los últimos años, sin embargo, el contexto de crisis económica parece haber afectado al ritmo de crecimiento. Ante esta realidad, el presente estudio aborda, tras un breve recorrido histórico por los orígenes, la evolución de las agencias de RP en Cataluña en los últimos 25 años. El objetivo reside en analizar el desarrollo de las consultoras con sede en Cataluña durante los últimos 25 años con el fin de contribuir al conocimiento sobre la historia y naturaleza de esta disciplina en el marco geográfico donde se inició. Para llevar a cabo esta investigación, se diseñó un cuestionario de diez preguntas sobre la trayectoria histórica de las agencias en Cataluña, que se envió a casi 60 empresas desde mayo de 2014 hasta mayo de 2015. Los resultados reflejan que, a pesar de la crisis, han surgido nuevas agencias. Además, se observa un desarrollo del área de las RP digitales y una preferencia por el uso del término "comunicación" en detrimento del de "relaciones públicas".*

### **Palabras clave:**

*Relaciones públicas; agencias de comunicación; historia de las relaciones públicas; comunicación estratégica; Cataluña.*

## 1. Introduction

Investigation of the origins and history of public relations has had a notably American character until slightly more than a decade ago (Miquel-Segarra and Navarro-Beltrá, 2016, Rodríguez Salcedo, 2008). In fact, the most reputable scholars have claimed that modern public relations began in the United States before it started in other countries (Grunig, Grunig, 1992; Hiebert, 1966), protected by the right to free expression and further developed through the evolution of media communications and industrialization toward the end of the 19th century. During the first half of the 20th century, the first public relations consultants appeared and the first agencies were established: Publicity Bureau in 1900, William Wolff Smith in 1902, and Parker & Lee in January 1905 (Cutlip, 1995).

According to prevailing historical data, American public relations firms arrived to the European continent soon after World War II and began an expansion initiated by Hill & Knowlton (Sotelo, 2001). Although the level of development varied among countries for political, economic and social reasons, public relations agencies are considered to have operated on the European continent since the 1960s (Sotelo, 2004).

In spite of the predominance of American historiography (Vasquez and Taylor, 2001), in recent years several authors claim to have recovered historical information of other nations in the study of public relations (Bentele and Wehmeier, 2009; Bini, Fasce and Muzi Falconi, 2011, Fitch and L'Etang, 2017, Lamme and Russell, 2010, L'Etang, 2008, 2012, Miller, 2000, Raaz and Wehmeier, 2011, Rodríguez-Salcedo, 2012, Szyszka, 1997, Watson, 2014), and have succeeded in placing the focus on the importance of a country's political, economic and social context in the development of the public relations profession (Rodríguez Salcedo, 2015). In this sense, a number of specific studies have emerged related to the evolution of this profession in Spain (Almansa, 2009, Arceo, 2004, Castillo 2011, Gutiérrez and Rodríguez, 2009, Montero et al., 2010, Noguero i Grau, 2004, Rodriguez Salcedo, 2008, Rodríguez Salcedo and Xifra 2015, Rodríguez-Salcedo, 2015, Rodríguez Salcedo and Gómez Baceiredo, 2017, Xifra 2011a and 2011b, Xifra 2012, among others).

The first public relations campaigns in Spain appeared in the late 1950's (Armendáriz, 2012, Gutiérrez and Rodríguez, 2009, Reina, 2015, Rodríguez Salcedo, 2008, Rodríguez-Salcedo, 2015, Rodríguez-Salcedo and Xifra, 2015). Even though there is some controversy about the practice of what is known today as public relations during the Franco regime (Sotelo, 2004; Arceo Vacas, 2006), it was during this period that the first public relations agency was set up in Spain and the profession began to progress within the context of the Stabilization Plans aimed at improving the economic situation, as well as legal provisions such as the Press Law (*Ley de Prensa*) of 1966 (Rodríguez-Salcedo, 2015).

In November 1960, Joaquín Maestre founded the first public relations company, SAERP, in Barcelona (Montero, Del Río, Rodríguez, et al, 2010, Rodríguez-Salcedo, 2015). In the same decade, two public relations agencies appeared in Barcelona: Jesus Ulled and Associates, Public Relations Advisors Ltd. (*Jesús Ulled y Asociados, Consejeros de Relaciones Públicas S.A.*),

founded by journalist and lawyer Jesus Ulled in 1964; and the agency Conveplan (1963-64) (Rodríguez-Salcedo and Buil, 2015). Although there is no official documented evidence, Frederic Roda's family claims that the Catalan writer and critic devised Conveplan, the third public relations agency dedicated to the promotion of culture, alongside Jordi Sarsanedas and José Luis Turull. At its head office, development of the business was begun by Agustí de Uribe-Salazar, who in 1977 would open his own public relations office: Uribe Public Relations Firm (*Gabinete Uribe*).

Apart from the first four Catalan agencies, another consultancy firm that was established in Spain in 1964 should also be mentioned: Jennings Public Relations, started by Bernard Jennings, can be seen on the official member list of the IPRA - International Public Relations Association (1972: 51).

Shortly after the establishment of the first public relations consultancies in Catalonia, association movements began in search of recognition for the profession. The Technical Association of Public Relations (*Asociación Técnica de Relaciones Públicas*) (1961-1965) was followed by the Association of Public Relations (*Agrupación de Relaciones Públicas*) (1965) in Barcelona (De Uribe, 2015), and the Spanish Center for Public Relations (*Centro Español de Relaciones Públicas*) (1965) in Madrid. One year later, the celebration in Barcelona of the Annual Assembly of the International Public Relations Association (IPRA), an international organization of European origin, promoted closer relations between the Barcelona and Madrid associations that resulted in their being united into a single entity known as the Spanish Public Relations Center (*Centro Español de Relaciones Públicas*) (1966). The apparent consensus between the Madrid and Barcelona chapters came to an end just one year later in the summer of 1967 when the two associations separated.

However, this brief alliance resulted in some achievements for the profession, such as the incorporation of the subject "Fundamentals of the psychology, theory and techniques of propaganda and public relations" to the course syllabus of the Official School of Journalism (*Escuela Oficial de Periodismo*) through a Ministerial Decree on April 20, 1967 (Montero, Rodríguez et al., 2010, Rodríguez Salcedo, 2012, Rodríguez-Salcedo and Xifra, 2015).

With the groundwork having been laid in the 1960's, this situation also made it easier for the Higher Education School of Public Relations (*Escuela Superior de Relaciones Públicas*) to open its doors in Barcelona in 1968. The establishment of the Faculties of Information Sciences in August 1971 and the recognition of the Faculties of Information Sciences in Madrid, Barcelona and Navarra, would clear the way for the later inclusion of the discipline (1974) in the course syllabuses of these new academic departments (Arceo Vacas, 2004, Barreiro, 2009, Gutiérrez and Rodríguez, 2009, Montero, Rodríguez et al., 2010). The Franco regime would say farewell with other achievements, such as the National Union of Technicians in Public Relations (*Agrupación Sindical Nacional de Técnicos en Relaciones Públicas*) (1973) and the Official Register of Technicians in Public Relations (*Registro Oficial de Técnicos en Relaciones Públicas*) (1975) (Montero, Rodríguez et al., 2010).

When the Franco regime ended and democracy was established, the next milestone that undoubtedly favored the professional consolidation of this activity was the arrival in the 1980s of the first American public relations agencies. The consulting firm Burson-Marsteller opened its offices in Madrid in 1981 under the guidance of Teresa Dorn of North America, and later opened another office in Barcelona in 1985 (Rodríguez-Salcedo and Gómez-Baceiredo, 2017). For its part, Hill & Knowlton opened its offices in Madrid in the same year (1981) with Nidardo Cuadrado, and later in Barcelona in 1989.

Gradually, several public relations firms emerged in the 1990s (Xifra, 2011), attracted by the growth of the business prior to the organization of the Barcelona Olympic Games and the Universal Exposition of Seville in 1992 (Llorente, 2015). Some of these firms came from the Spanish capital and others were new multinational agencies that settled in our country. Thus, the public relations function extended its services to different sectors. At present, several studies have addressed the development of the profession in our country and confirm its consolidation (ADECEC *Asociación de Empresas Consultoras en Relaciones Públicas y Comunicación* Association of Communication and Public Relations Consultancy Companies 2002, ADECEC, 2008, DIRCOM *Asociación de Directivos de Comunicación* Association of Communication Executives and Managers 2000, DIRCOM 2005, DIRCOM 2010, PUNTO BASE, 2013; And CARRERA, 2014). The role of communication has become increasingly important for companies. Moreover, organizations continue to rely on specialized agencies to carry out (partially or completely) some of their communication projects (DIRCOM, 2015). At the same time, as in any other sector, the economic crisis has affected the development of agencies (DIRCOM, 2014); throughout Spain, the public relations sector experienced a drop in sales revenue of more than 100 million Euros (-23%) in 2009. In 2010 it recovered business volume with a growth of 11%, and in 2011 the figures hardly changed (+2%) (Torres and Carrera, 2015).

Within this context, the focus of this article is the study of the historical evolution of public relations and corporate<sup>1</sup> communication consulting firms in Catalonia, specifically those based in Barcelona, over the last 25 years. Barcelona was chosen because it is considered the city where the first public relations agencies appeared in Spain, and also due to the fact that currently 27% of the 30 most important public relations agencies are located in Barcelona (Torres and Carrera, 2016), a figure that has been gradually decreasing in recent years. In summary, the objective of this article is to offer a perspective on the historical evolution of the communication consulting industry and offer data in order to provide a more complete analysis of this profession, and consequently to examine more deeply the development of this activity.

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<sup>1</sup> In order to encompass the entire scope, companies that use the term communication or corporate communication have also been included in the research. According to Arceo (2004), at the beginning of the 21st century the term "public relations" declined in favor of other titles such as "corporate communication, comprehensive communication, etc., which share the same objectives as public relations."

## 2. Methodology

After a review of the literature regarding the sector, it was discovered that there is a lack of data on the development of consultancy firms in Catalonia. For this reason, the research began by approaching the problem using a questionnaire that was prepared and sent to public relations consultancy firms with offices in Barcelona in May 2014. The questionnaire consisted of 10 questions that sought to collect data on the historical evolution of communication agencies, also known as communication consultancies. Specifically, the following issues were addressed: the year the firm was founded, its original name, the name/s of the founder/s, services offered in the 1980's and 1990's, development in workforce size, professional profiles of the workers, agency orientation (public relations, communications, publicity, etc.), source of capital and contact with multinationals, emblematic campaigns in the first years of the company, and the names of important people in the development of the public relations industry who would be useful candidates to interview<sup>2</sup>.

In May, the questionnaire was sent by email to 47 public relations agencies based in Barcelona. A list of consulting firms was obtained from the information published in the Mercantile Registry, in the Yellow Pages, and in several studies of the sector, such as the reports by Torres and Carrera (2014, 2015 and 2016). During the month of June 2014, the results of the survey were collected. In addition, two email reminders were sent to consulting firms that had not replied in an attempt to collect as many responses as possible. All reminder messages were accompanied by a phone call to ensure that they had received the questionnaire. This process lasted until July 2014.

In November 2014, after having conducted an interview on October 30 with the dean of the Advertising and Public Relations College of Catalonia, Ton del Pozo, the questionnaire was sent out again. Specifically, 9 more questionnaires were sent to public relations and communication agencies based in Barcelona in order to reach a larger number of consulting firms.

In total, 56 public relations agencies were contacted and the questionnaire was sent to their firm by email in order to invite them to participate in the study, and 29 consultancy companies responded, thereby obtaining a response rate of 51% (Table I). Among the agencies that participated in the study, a common pattern could not be established due to the fact that they had different characteristics. Some were agencies with more than twelve employees and an international presence; however, others were small firms that operated locally; some were newly created, and others, by comparison, had been operating in the market for more than 25 years.

With regard to the agencies that did not agree to participate in the study, it should be mentioned that the reasons they have given are diverse. For example, one multinational agency replied: "I saw the questions but I couldn't answer most of them for reasons of confidentiality"; another multinational agency that had been operating in the sector for many years said: "We

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<sup>2</sup> See Appendix 1: Table includes the 10 questions that appear on the questionnaire sent to the communication consulting companies.

can confirm that we do not answer these types of surveys. We hope to be of use to you at another time"; or "After mentioning it to our General Director, we prefer not to participate in the survey," was the response of another consulting firm.

### **3. Results**

#### *3.1. Development of agencies in the 1990s*

Some authors point to the second half of the 1990s as the period of highest growth for consulting firms (Arceo, 2004, Tilson and Saura Pérez, 2003). A study by ADECEC points out the change that went from a total average turnover of 69 million euros in 1996 to over 150 million euros in 2000 (ADECEC, 2002). In fact, the 1990s brought a structural change that resulted in tremendous growth for the PR industry that was higher than that of other businesses in the world of communications (Álvarez, 1991).

Thus, agencies funded by Spanish capital that had been created at the end of the previous period experienced very strong growth during these years. This was the case of Inforpress (since February 2015, Atrevia) which started its activity in 1988 with offices in Barcelona and Madrid. According to data collected in the questionnaire, the company, founded by Núria Vilanova, began by offering press and public relations services. Two emblematic campaigns carried out in that decade were the Informat Fair and the Aspirin Centennial. In addition, in the 1990s other firms were created in Barcelona, such as Bassat Ogilvy Comunicación, Solsona & Filloy Comunicación Integral, Clotet, Presston Comunicación Internacional, and Llorente y Cuenca.

Luis Bassat, the first to inaugurate the decade, founded Bassat Ogilvy Comunicación, which at that time was described as a PR and communications agency with "full PR services". The agency had offices in Barcelona, Madrid and Seville. The number of employees with a consulting profile ranged from 5 to 55. In those years, firms implemented unique campaigns such as the opening ceremonies of the Seville Expo or the Olympic Games. The company was created with Spanish capital, but at the present time it is a multinational firm.

In November 1993, Montse Solsona and Antonio H. Filloy founded Solsona & Filloy Comunicación Integral. It was an agency with experience in events and protocol. In 1998, the agency changed its name to Montse Solsona Comunicación, leaving Solsona as the main partner. Medium in size, the agency has always had a workforce of 10 - 15 professionals, reaching a total of 20 employees in Barcelona and Madrid in the most intensive years of the PR industry. The profiles of the workers have been diverse, with educational backgrounds ranging from Information Sciences and Business Administration to Politics and Humanities. The presentation of the Port Vell public spaces in Barcelona or the prize for the best secretary of the year for Manpower were some of the projects this agency has worked on, and they wanted to emphasize this in the questionnaire.

Clotet, a consulting firm specializing in corporate communication strategies and institutional relations, was established in 1995. Xavier Roca founded the agency known as Presston Comunicació Internacional in Barcelona in 1996. The agency, financed with Catalanian capital, was described at the time as “a communications agency”. Its staff consisted of journalists, art directors and professionals dedicated to production, editing and layout, and its workforce has oscillated between 6 and 16 workers. In the questionnaire, they point out the highly acclaimed campaign of the Opera Aida, “*Tibidabo closer to you*” (Tibidabo més a prop teu), and the image of the *Planeta de Agostini* website as some of the campaigns they carried out in that decade.

In 1998, the Llorente y Cuenca agency opened an office in Barcelona. José Antonio Llorente and Olga Cuenca had founded this company in Madrid in 1995 after having been trained at Burson-Marsteller, Madrid. The company experienced rapid growth in Spain and initiated its expansion into Latin America before the year 2000. Specifically, they opened their first office in Lima, Peru, in 1998 and in Buenos Aires, Argentina, in 1999, where today it has become the main communication consultancy firm in the country and the one that has experienced the highest rate of growth in the local market in recent years (Llorente, 2015). In fact, in the latest rankings of global public relations agencies, Llorente y Cuenca held the top spot among Spanish agencies and were ranked 55 out of 250 worldwide (<http://worldreport.holmesreport.com/top-250>). The campaign they designed for the video and DVD release of the film "Barbie Princess Rapunzel" from Universal Pictures is a sample of the work they carried out during that period and the one they prefer to highlight.

Another development from that period reflected in the questionnaire was the entry of multinational agencies into our country. This was the case of the agency Weber Shandwick and Evercom, being just one example. In 1990, Weber Shandwick was established in Spain after acquiring SAE de RP, the public relations pioneer. For its part, Evercom opened an office in Barcelona as an independent company that specialized in strategic consulting and public relations, and they carried out various projects for companies, institutions and public administration at that time.

The emergence of specialized public relations firms should also be highlighted. Several medium-size specialized agencies emerged, funded with national capital, such as Miguel Ramos (1987), founded by Miguel Ramos Tornadijo. This agency carried out clipping work but did not expand its offer related to media until 1992. The professionals working there have a journalistic profile, and “in the best sales years, their numbers ranged from 10 - 15 employees”. In 1992, Pablo Herrera Fontanals, Toni Caubet, Marcelo Ruz and Jordi Petit founded a new agency in Barcelona specializing in corporate publications: BPMO Edigrupo. Services offered included the design, redaction and management of corporate publications. In 10 years’ time they grew from 4 to 40 employees, which reflects the demand that existed for that type of service; in fact, five years later, in 1997, the agency opened an office in Madrid. Later it changed its name to DCorporateCom, although it has always been completely funded with Spanish capital.

The agency Nal3 Team, founded in 1998 by Marta and Daniel Liñán in Catalonia as a media relations agency, is another example of a specialized firm. In practice, it provides services related to media relations, events and sponsorships. The number of employees has ranged from 2 to 11, and according to answers given on the questionnaire, the staff has various profiles and come from diverse backgrounds, including economics, humanities, engineering, as well as the translation and interpretation sectors. Later, the company changed its name to Nal3 Comunicació.

The results show that consolidation of public relations agencies and the services they offered took place in the late 1990s, and their activities were professionalized as well.

### *3.2. The development of agencies in the 21st century*

In the first years of the 21st century, the growth of public relations agencies continued (ADECEC, 2008). According to the management of Nal3 Comunicació, the agency had a sustained growth of 6% per year until 2008. This fact explains the emergence of agencies and the consolidation of others such as Agencia Cincuenta y Cinco, by Luis Valls (1989), dedicated to the organization of events, graphic creativity and design, press office work, and celebrity connections. This agency, which has always been funded with Catalanian capital, has had professionals with various profiles on its staff.

Indeed, new consulting firms dedicated mainly to media relations are still being founded, an example of which is Strategycom, established in the year 2000 by Joan López Alegre. The firm has evolved from being a press agency to a comprehensive agency with communication services for SMEs, institutions and Spanish multinational companies with either very small marketing and communication departments, or none at all. According to its founder, “the company was initially composed exclusively of journalists, but now includes employees with other profiles such as graphic designers, experts in digital communication and computer programmers, among others.”

The workforce reached 27 professionals in 2008 due to the fact that in Catalonia it also represented *Grupo Negocios* (Business Group) publisher of *La Gaceta de los Negocios* (Business Gazette) and the magazine *Dinero* (Money), as well as the communication office in Catalonia of AENA (*Aeropuertos Españoles y Navegación Aérea* - Spanish Airport Management and Air Navigation). AENA is a public entity that manages airports and heliports in Spain. With the economic crisis, the part of the company dedicated to advertising was closed and the current staff in Madrid and Barcelona is composed of only 10 people. The company resumed its role of representing the media in Catalonia at the end of 2014 by incorporating the programming and commercial management of Capital Radio in Catalonia. In 2005, it opened its headquarters in Madrid.

In 2003, Carme Miró, Kirsty Brown and Olivia Walsh founded Apple Tree Communications with offices in London and Madrid. A year later, Ramon Cobos, Alejandro Luque and Alfonso Vericat founded Kerygma Communication. At the beginning, the company was a consulting firm, but it has evolved to include the following: strategy, media planning, creative



activities, production (graphic, online and audiovisual), as well as social media positioning. In the questionnaire, the agency explains that this approach guarantees consistency in its message for each campaign. Moreover, all of the team involved bear the stamp of Kerygma. Some of the projects carried out have been the launch of the ONCE Combo or the communication design of the current banking offices of La Caixa and BBVA. It currently has 20 employees in Madrid and Barcelona.

In 2006, Álvaro Montoliu created AMT Comunicación as a communication agency. Its size has varied according to its needs and the profiles of the clients the agency has worked with over time. During the past ten years, the average workforce has held steady at 4 people and the funding has come from Spanish capital. The most emblematic client of the agency has been Singapore Airlines with its arrival in Spain and the establishment of its hub in the Barcelona-El Prat Airport as the first transcontinental airline that chose Barcelona over Madrid.

In the same year, Sofía Gutiérrez de Escofet opened Soges Comunicación as an agency that offered “comprehensive communication services”. The professionals who work there come from the areas of journalism, public relations and advertising. The number of employees has varied from 3 to 14, and the company is financed with Catalanian capital.

Also in 2006, the multinational Kreab Garvin Anderson began operations in Barcelona. Its service offer is oriented to financial and corporate communication, social media and public affairs management. The number of employees in Spain has increased from 10 to its current number of 50. The agency Alicia Comunicación also opened its offices in Barcelona in 2006.

In 2007, Deborah Gray founded Canela Public Relations. Canela PR has been progressively increasing its workforce according to its client portfolio. By contrast, being a young agency, the professional profiles have not varied much: the employees have been trained in the field of communications, either as journalists or public relations professionals. At the same time, the company emphasizes on the questionnaire that “for some years now, with the rise of Internet and the power of social networks, all employees have been trained in these areas in order to offer a comprehensive communication service to clients.” Canela PR has always maintained its philosophy of being an independent public relations agency. The agency is capitalized with private funds from its founder and partners. However, in order to offer services to its clients in other countries, it belongs to several international agency networks, one of which is Ecco PR Network.

During those years, mergers and acquisitions continued to take place as they had before. As a result, the agency founded by José Luis Sanchís, one of the pioneer firms in Spain (it began operations in Madrid in the 1970s and in Barcelona in the 1990s), became part of the international group Incepta in 2005. In turn, it was later acquired by Huntsworth, the fourth largest communications and PR group in the world. For its part, the Clotet agency, created in Barcelona in 1995, also became part of the Ketchum International Network in 2010.

However, as mentioned in the questionnaire, some of the takeover bids came from domestic companies and not all attempts at expansion were successful. Thus, Agencia Román y Asociados, founded by Santiago Román in 1989 in Barcelona, had several contacts with multinational as well as national companies, but they “failed to reach an agreement”, and the agency continues today as a company financed by domestic capital. Agencia Cincuenta y Cinco also received two purchase offers; the company BPMO Edigrup held talks that were unsuccessful; and Inforpress – currently Atravía - also rejected purchase offers and remains a family business.

According to the results, another event that occurred during this period was that some consulting companies located in Madrid opened offices in Barcelona. This was the case of ACH Consultores de Comunicación, which opened its offices in Barcelona in 2010. At the same time, some agencies in Barcelona began their activity in Madrid: Canela Public Relations in 2007 is one example.

Likewise, the process of expansion by Spanish agencies continued toward the Latin American market. This was the case of Inforpress –currently Atravía– which opened its office in Brazil in 2010, and from that moment on entered the Latin American market by settling in other countries such as Colombia, Peru and Chile (Llorente, 2015). For its part, Llorente y Cuenca, which had already begun the process of expansion in Latin America at the end of the 20th century, continued to open offices in the region: Bogota in 2000, the focus of which was "projects involving corporate communication and finance, public issues, and strategies for the mining energy sector"; Panama in 2002; Quito in 2003; Rio de Janeiro in 2008, São Paulo in 2013; Mexico City in 2008; Santo Domingo in 2012; and finally Santiago de Chile in 2014, the latter being a result of an alliance with the Chilean consultancy firm CR Comunicaciones.

On the other hand, the economic crisis that began in 2007 brought about important changes in the public relations sector. In order to assess the impact of the economic crisis on agencies, it helps to take into account the repercussions of the economic recession on the annual planning and daily business activities of its clients - the communication departments of companies (DIRCOM, 2014). Public relations and communication agencies lost customers, received fewer requests for collaboration, and had strikingly lower budgets than in the previous decade. In fact, no sustained growth figures have yet been achieved (Puesto Base, 2013, Torres and Carrera, 2014, 2015 and 2016).

Despite the decrease in turnover, new public relations agencies have continued to emerge in Barcelona, according to the responses obtained in the questionnaires. In 2009, Gotoclient arose as “a 360° promotion and service agency”, funded by Catalanian capital. Jordi Marca founded the agency and the company currently has 7 professionals working in the area of public relations and economics. In that same year, Ton del Pozo and Joan Fondevilla founded Punta Alta Comunicación as a communication agency funded with Catalanian capital as well. From its beginnings to the present, it has increased from 6 to 14 employees. One of the projects on which they have worked was the campaign to raise awareness about cardiovascular health among the Spanish population.

Moreover, within the context of economic crisis, the restructuring that large agencies experienced ended with the departure of executives. These high level managers, who had had long professional careers in the sector, decided to start their own agencies. Such was the case of Onza Comunicación y Marketing that was founded in 2013 as “a planning agency for communication and promotions”. Among its founding partners is Marta Salvat, former General Director of DEC (BBDO). According to Marta Salvat’s comments on the questionnaire, these individuals are multidisciplinary consultants capable of defining the communication strategy of a company or institution while at the same time ensuring its implementation.

In 2013, two other professionals with extensive experience in Bassat Ogilvy Comunicación, Cristina de Diego and Lorena Clapers, established Clapers de Diego Comunicación. As stated on the questionnaire, they started this project “with the dream of being a national and international communication agency”. Currently, eight people make up the team that offers communication strategies and public relations, press office services, events, digital communication and creative services.

In short, the economic crisis has favoured the emergence of smaller yet highly competitive communication consulting firms with the vision and knowledge of large firms. In fact, when analyzing the overall drop in turnover, “specifically from 129 million Euros in 2011 to around 126 million in 2012, a fall of 3%” (Torres and Carrera, 2014), the study mentions the possibility that this decrease might be due to “the transfer of billing from these large companies to smaller firms (in many cases micro-businesses) that represents around 70% of the turnover of PR companies in our country” and not so much a new decline in the sector.

Therefore, large public relations agencies in this market continue to coexist with a group of small consultancy firms that are heterogeneous and numerous, and to a greater or lesser extent, have been recently founded. This group is classified as a heterogeneous collective because there are significant differences among them with regard to size, services offered, types of customers, turnover, property, development and ownership (Matilla, 2007). According to a study by ADECEC (2008), public relations consulting firms operating in our country with foreign capital make up just 12.5% of the total, which indicates that there are many agencies funded by national capital. Currently, of the companies dedicated to public relations consultancy, 30 are associated with ADECEC, of which 15 have offices in Barcelona: ACH, Alicia Comunicación, Apple Tree Communication, Atrevia, Burson-Marsteller, Cinnamon, Edelman, Evercom, Globally, Grayling, Hill & Knowlton, Ideogram, Ogilvy Public Relations and Weber Shandwick.

With regard to professional profiles, most of the medium-sized companies based in Barcelona work with specialists in the field of communications who usually have degrees in Journalism, Public Relations and Advertising, or even Finance and Economics at an expert level.

At the same time, according to comments made by ACH Consultores on the questionnaire, the sector has moved in the direction of more specific profiles parallel to the evolution of training itself. For example, the rise of new technologies

affects the organization of consultancy firms, and it is difficult to find agencies that do not have professionals who specialize in digital communication (Estanyol and Lalueza, 2013).

In large agencies like Llorente y Cuenca, for example, the results show a broad spectrum of professional profiles from disciplines such as Information Sciences, Business Administration and Management, Law, International Relations, and Political Science, as well as postgraduates in Corporate Communication, Public Issues, and Reputation Management, among others.

Therefore, the specialization that occurred in the previous period has continued in recent years. In turn, we are not only seeing specialization of the service at the present time, but also a specialization by sector. An example of this is Deva Comunicación Financiera y Sostenibilidad, founded in 2014 in Barcelona, which began as “a corporate agency with a financial focus”, according to answers given on the questionnaire. This agency has professionals in the area of communication and experts in finance and sustainability, a combination that they say allows them to offer customers a diversified portfolio of services covering all aspects of corporate communication. Gonzalo Lacalle and Juan Torres are the founders of the agency that has been financed with Spanish capital. At the present time, the company also has an office in Madrid and a permanent staff of 13 people, in addition to a network of external collaborators.

La Machi was founded by Juan Della Torre in Argentina in 2010 and later opened an office in Barcelona in 2013. This agency is another example of a specialized consulting firm. From its inception, the agency was presented as a communication consultancy specializing in charitable causes, and even though it has rejected the term communication consultancy in favour of “creative boutique”, it continues to specialize in good causes. “When we talk about charitable causes, we refer to institutions that are dedicated to altruistic goals, as well as to multinationals that want to have a communication plan based on values, or have programs related to CSR (Corporate Social Responsibility), etc. We help companies communicate their good causes”, they emphasize on the questionnaire. Amedio Comunicación is another agency that was set up in April 2014 by Marc Florensa and Gemma Pelegrí as a communication agency specializing in press services and 2.0.

From a terminological point of view, as occurred in the 1990s, there is a lack of homogeneity in the names of companies. The results show that most companies use the term “agency”, “consulting company” or “consultancy”. At the same time, although there are still a variety of terms that can be used to refer to their activities, companies are more inclined to use the term “communications” rather than “public relations.” Also, agencies like Llorente y Cuenca emphasize the idea of strategy-reputation management. Accordingly, a name change can be significant, as in the case of Inforpress (1988), which in February 2015 changed its name to Atrivia in order to respond to a broader concept of communication and not be associated exclusively with media relations.

#### 4. Conclusions

The first three public relations agencies in Catalonia were established in Barcelona more than half a century ago. Thanks to the political, economic and social changes that began in the 1970s, new agencies were created in Catalonia in the decades that followed.

The sector reached its highest growth rate in the 1990's, and from that time until today public relations and communications agencies have played an active role in the Catalan market. This research shows that over the last 25 years, new and diverse communications and public relations consulting firms, with regard to size and services offered, have emerged. At the same time, it has been confirmed that during the last eight years the economic crisis has strongly affected activity in the sector, especially by a notable decrease in the number of clients and employees. At the present time, the turnover figures for public relations agencies are far lower than the nearly 450 million Euros invoiced in Spain in 2008.

Given the title of this study, one can see that there is a discrepancy in terminology when defining the role of public relations, as well as a preference for the term "communication" rather than "public relations." This conclusion is consistent with the results of the annual reports by the European Communication Monitor of 2011 and 2015 (<http://www.zerfass.de/ECM-WEBSITE/media/ECM2011-Results-ChartVersion.pdf> and <http://www.Zerfass.de/ECM-WEBSITE/media/ECM2015-Results-ChartVersion.pdf>), as well as the results of work carried out by Ruler and Verçiç (2004). Over the last 25 years, agency names have evolved, and many firms have abandoned the term "public relations" in favour of a broader and more strategic concept of communication.

In terms of activities carried out by agencies and the services for which they are hired, the area of media relations, though still highly requested, is no longer the only service, nor even the main one, offered by agencies. An example of this can be seen with the name change from Inforpress to Atrévia. It is therefore clear that agencies have expanded their fields of expertise. In this sense, agencies are experiencing tremendous growth in terms of digital and/or online communication, the numbers of which stand at 11.95% of the business activity that companies develop externally with public relations agencies. It can also be concluded that specialized agencies have appeared by sector, two examples of which are La Machi and Deva Comunicación.

It has also been confirmed that there is a diversity of agencies in terms of size. Catalonia has communications consulting companies that have several employees on staff and others that are freelance operations with one single employee, which concurs with the conclusions of other authors such as Wilcox, Cameron and Xifra (2012). With regard to this point, the importance of microenterprises is also verified, as reflected by the studies carried out by Torres and Carrera (2014, 2015 and 2016), as well as the diversity of profiles that have been incorporated into the sector.

In conclusion, it can be said that at the beginning of the 21st century, the sector of strategic communications and public relations has been consolidated in the Catalanian market. The public relations agencies and consultancies located in Barcelona enjoy a high level of professional development and are financed mostly by national capital. It can also be observed that the economic crisis has not halted the emergence of new companies dedicated to public relations and communications.

Finally, the need to carry out this type of research in other regions of Spain is proposed as a future line of investigation for the purpose of gaining deeper knowledge into the evolution of this discipline. To this end, it will be necessary for the sector to overcome its reluctance in this matter, and for researchers to obtain greater collaboration from some consulting companies. This situation has undoubtedly been a limitation in this study.

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**APPENDIX 1:** Table with the 10 questions included on the survey that was sent to communication agencies

QUESTIONS ON THE SURVEY SENT TO AGENCIES

1	In what year did your agency start its operations in Spain? And in Catalonia?
2	What was the first name of your agency?
3	What is the name/s of the founder/founders?
4	What services did your agency offer in the 1980s and 1990s? And from the year 2000 onward?
5	What variation has there been in the number of employees over time?
6	What are the professional profiles of the employees of your agency?
7	How did the agency describe or present itself in the beginning? And currently?
8	Have you had any contact or purchase offer from other multinationals in the sector? Has your company's capital been of Catalanian...Spanish...or International origin?
9	Do you remember any emblematic campaigns carried out by your agency that are considered examples of the work completed by your firm in the 80's or 90's?
10	Would you mind providing us with the names of other people who would be useful for us to interview for this research (founders of agencies, outstanding professionals, or advocates of the profession in its origins)?