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Strategic and organisational challenges in the integrated marketing communication paradigm shift: A holistic vision

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ABSTRACT

Digitisation and the consumer evolution have been leading to a paradigmatic shift in integrated marketing communication (IMC). Despite all of the research that has investigated the underlying topics of IMC evolution, little attention has been devoted to performing a comprehensive reading of the challenges that remain according to advertisers and communication players. In this paper, through an exploratory inductive and qualitative study (86 in-depth interviews), we develop a holistic conceptual model of these managerial challenges in a way that cuts across the different categories of players (advertisers, traditional and digital agencies, media centres and publishers/broadcasters). Our results reveal the various types of strategic and organisational challenges as well as the main specificities in practitioners' perceptions based on their player category. Finally, this article proposes recommendations for how players can address these challenges.

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1. Introduction

Digitisation, the disintegration of mass markets, empowered customers (Denegri-Knott, Zwick, & Schroeder, 2006; Kerr, Mortimer, Dickinson, & Waller, 2012), the fragmentation of traditional advertising media and audiences (Gurău, 2008; Kerr & Schultz, 2010), the emergence of new media, simultaneous media exposure and consumer multitasking (Chen, Venkataraman, & Jap, 2013; Wang & Tchernev, 2012) have been determining the paradigmatic shift in integrated marketing communication (IMC) for many years. The relational architecture of marketing has evolved from linear to reticular, with a combination of traditional communication models—push (outbound)—and innovative modes of communication that are based on pull (inbound) and/or collaborative approaches (Kozinet, Hemetsberger, & Schau, 2008; Schultz & Patti, 2009). The direct involvement of various nodes of the marketing communication network—that is, consumers, advertisers and various types of communication partners—is increasing in interactive communication flows.

In this evolving ecosystem, already in 2008, Ozuem, Howell and Lancaster called for 'reinvention' of the IMC managerial framework.

Despite the numerous studies that have examined the underlying topics of IMC evolution, little attention has been devoted to obtaining a comprehensive reading of the managerial challenges that advertisers and communication players continue to perceive as significant issues.

This important research effort should be conducted by considering not only the new digital ecosystem but also the entire IMC landscape, in which the distinction between online and offline media is disappearing and in which the traditional mass communication paradigm is becoming integrated with new interactive and social models. Thus, we consider the IMC ecosystem as a whole, in which old and new communication models are combined and in which consumers and different types of players are actively involved (Grant & McLeod, 2007; Mulhern, 2009; Vernuccio, Ceccotti, & Pastore, 2012).

In view of this approach, this paper aims to develop a holistic conceptual model of the remaining managerial challenges still posed by this paradigmatic shift, widening and deepening practitioners' interpretative perspectives through an exploratory inductive and qualitative approach.

1.1. The IMC paradigm shift

Although academic discussion on the definitional issues of the IMC concept retains a central position (Kitchen, 2005; Kliatchko,

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2008, 2009; Moriarty & Schultz, 2012), scholarly attention to the 'paradigm shift' in IMC is growing (Duncan & Moriarty, 1998; Winer, 2009). In 2009, Kitchen and Schultz argue for a completely new view and new agenda in this field, beginning with the recognition of some of the main topics of the IMC paradigm shift: the evolution of media, consumers and marketing organisations.

Regarding the media evolution, various studies have investigated the issues of media and audience fragmentation (Mulhern, 2009; Soberman, 2005), cross-mediality and the development of media synergies (Naik & Peters, 2009; Schultz, Block, & Raman, 2012). Kerr and Schultz (2010) highlight the importance of technological changes in media and messaging that lead to two communication marketing models that managers cannot manage separately. In the traditional outbound or push model, communication is one-to-many, and messages and channels are under the control of the company. In contrast, in the new inbound or pull system, communication is interactive, and consumers are more active multitaskers (Pilotta, Schultz, Drenik, & Rist, 2004) and are increasingly interconnected and 'ubiquitous' (Deighton & Kornfeld, 2009). Academic research has focused on the significant evolution of the consumer role in the new marketing communication system (Denegri-Knott et al., 2006; Kerr et al., 2012). The consumer not only 'becomes more sophisticated and more time poor' (Kerr & Schultz, 2010, p. 550) but also is more engaged (Gambetti, Graffigna, & Biraghi, 2012) and 'technology-empowered', controlling what, when and how to use media and directly producing (or co-producing) and sharing brand-related content (Gensler, Völckner, Yuping, & Wiertz, 2013). Thus, centralisation is decreasing in favour of democratisation, a phenomenon that also results in a decreased level of company control in the production, distribution and consumption of their own marketing content (Fournier & Avery, 2011).

With respect to the marketing organisation evolution, Day (2011) emphasises the 'marketing capabilities gap' related to the limited response capacity of organisations confronting increasingly complex markets. With specific reference to the IMC, Schultz and Patti (2009) call for a greater research efforts and consider organisational issues to be 'the next step in the development of IMC' (p. 78). Moreover, Smith (2012) emphasises the need to give greater consideration to organisational factors such as culture, flexibility, adaptation and an open social system to facilitate integration into marketing communication. Recently, analysing challenges and solutions for marketing in a digital era, Leeflang, Verhoef, Dahlström, and Freundt (2014) emphasise that the organisational challenge has yet to be addressed by firms.

1.2. Purpose of the study

IMC studies have always sought solid empirical bases by analysing the perspectives of practitioners (Gould, 2004; Kerr, Schultz, Patti, & Kim, 2008), with the majority of contributions focused on advertising agencies and advertisers (e.g., Gurău, 2008; Kassaye, 1997; Kim, Han, & Schultz, 2004; Kitchen & Schultz, 1999; Kitchen, Kim, & Schultz, 2008; Kliatchko & Schultz, 2014). Nyilasy and Reid (2007) emphasise the importance of formalising the 'knowledge autonomy' of agency practitioners with respect to the academic world and the need to establish 'knowledge flows' between the two categories to reduce the inevitable gaps. Grant and McLeod (2007) point out the importance of overcoming the analysis of exclusively dyadic customer–agency relationships to arrive at a 'holistic understanding' that should embrace the different nodes of the communication network. However, with respect to the different categories of communication players (i.e., advertisers, traditional

and digital agencies, media centres and broadcasters/publishers), little is known about the main issues that all practitioners still regard as challenging in this evolving ecosystem.

Thus, our first aim is to develop a holistic conceptual model that systematises the previously perceived managerial challenges of the IMC paradigm shift based on an analysis of the variables considered to be more representative of this change. The holistic model is based on a transversal reading that accounts for concepts that are prevalent among different types of communication players. In view of this objective, our research questions are formulated as follows:

RQ 1: What key innovation variables are interpreted by the different communication players as representative of the IMC paradigm shift, and what are the relationships among those variables?

RQ 2: What are the resulting managerial challenges that have not yet been fully addressed from the perspective of these players?

A cross-cutting interpretation (holistic) of the paradigm shift currently underway has the advantage of overcoming partial views that are limited to a specific position in the communication network and defining a large, integrative conceptual framework. However, understanding whether and how this change can assume different meanings depending on the type of player is also necessary (Mulhern, 2009). For example, possible differences in perspectives—and even conflicting perspectives—arise because of differences in terms of business goals, skills, attitudes towards risk, information asymmetries and power/status within networks (Grant, McLeod, & Shaw, 2012). Thus, the third research question is formulated as follows:

RQ 3: What are the main points of specificity in players' perceptions based on player categories?

2. Research design

To accomplish the research aims and to elicit 'practitioners' knowledge' without exercising conditioning as a result of researcher knowledge, we follow an exploratory inductive approach (Armstrong, 1979) in which no formal hypothesis regarding the IMC paradigm shift is proposed. Thus, a qualitative study based on 86 in-depth, personal interviews (Creswell, 1998) with top managers and senior communication specialists was conducted. To obtain access to concepts that practitioners consider important with respect to the IMC paradigm shift and to determine how these concepts are interconnected, the cognitive mapping technique was chosen (Axelrod, 1976; Chaney, 2010; Swan, 1997; Wrightson, 1976). Cognitive mapping is useful for analysing the cognitive structures of individuals and permits graphic representation of 1) the concepts (that is, the mental representations) developed by the respondents in relation to a given stimulus/problem resulting from the frame of reference and 2) the relationships among the concepts.

2.1. Sampling and informants

The selection of managers and professionals included in the dataset to be investigated was made following the 'key informant approach' (Robson & Foster, 1989) to formalise the perspective of practitioners who have the capacity to assess the overall scenario because of their high levels of experience. Consequently, only subjects in high-level corporate roles were contacted and interviewed (e.g., CEOs, marketing directors, directors of communications, brand directors, creative directors). The broad spectrum of practitioner roles ensured considerable diversity within the data. On average, the interviewees had 18 years of professional experience in the field of marketing and/or communications and had worked at approximately four different organisations during the

course of their careers. The interviewees belong to a group of advertisers and communication partners who are based in Italy but operate internationally. Italy was chosen mainly for two reasons. First, the Italian case facilitates the study of major agencies and advertisers that operate at an international level. Second, a self-contained sample in Italy allowed us to use already existing contacts and to more easily reach managers to conduct interviews. The target organisations were selected by identifying companies in five categories in an attempt to represent the complexity of the communication network:

- Advertisers (n = 40), including only multinational companies or large firms with an international market from eighteen sectors;
- Traditional agencies (n = 14), including advertising agencies that were born before the digital revolution and that belong to large international groups; agencies were considered if their core competencies were centred on traditional advertising (push);
- Digital agencies (n = 12), which are firms that have specialised in different forms of digital advertising, both those that were independent and those that belonged to large international groups;
- Media centres (n = 10), including firms that have specialised in media planning and media buying; and
- Publishers/broadcasters (n = 10), including large media companies offering advertising space for a fee.

Table 1 shows the job titles of the informants for each macro-category of player and specific sector of activity.

2.2. Data collection

To elicit participants' accounts of their spontaneous thoughts and experiences, we developed a brief interview guide based on open-ended questions (in addition to the fixed data) that covered three key points: 1) a preliminary general description of the IMC paradigm shift after sharing the meaning of IMC, as suggested by Kim et al., 2004; 2) a detailed description of the main variables that represent this change and the relationships among them, according to the informants; and 3) an explanation of the managerial

challenges connected to the key innovation variables previously expressed by the informants.

The interview guide was the same for all respondents regardless of their category because the overarching objective was to understand the perspectives of practitioners regarding the same general phenomenon. The interviews were conducted at the offices of the respondents, and their duration was between 30 and 45 min. Each interview was recorded and transcribed in full.

2.3. Data analysis

To answer RQs 1 and 2 and to define a holistic model—that is, a cognitive map—to systematise the 'subjective beliefs' that are shared by the majority of the respondents, the text of the interviews was analysed according to the stages of the 'documentary coding method' (Wrightson, 1976) described below.

- 1) *The text encoding*, i.e., the inductive definition of concepts or themes (map nodes) that were categorised as 'key innovation variables' (RQ1) or 'managerial challenges' (RQ2). A qualitative content analysis, using the theme as a criterion for identifying units of analysis (Kassarjian, 1977), was conducted for the encoding step (Bernard & Ryan, 2010; Krippendorff, 2004). The text was divided into segments of content (one or more phrases) that were associated with thematic categories. Given the inductive approach that was followed, these categories were defined a posteriori—that is, after two of the authors independently performed a careful analysis of the text. Following the methodological approach of King and Horrocks (2010), 'descriptive codes' (i.e., precise codes describing specific portions of text) were defined, and more general interpretative codes were then identified as the outcome of a process of abstraction. This procedure led to definitions of the key themes that characterised the thinking of the respondents.
- 2) *Preparation of the 'dictionary'*, or the list of all the concepts used by the respondents and their related verbalisations, aiming to identify and unify all statements with the same meaning (merging).
- 3) *Preparation of the 'relationship card'*, through which the specific relationships among the identified concepts were identified. To

Table 1
Study informants (n = 86).

Macro-category of player	Sector (Number of participants)	Participant job title
Advertiser (n = 40)	Airlines (n = 1)	Head of E-business
	Apparel (n = 2)	Director of Communications
	Automotive (n = 4)	CEO, Director of Communications and Public Affairs, Brand Director
	Beverage (n = 2)	Communication Marketing Manager, Director of Communications
	Consumer electronics (n = 3)	Marketing Director, Director of communications
	Consumer goods (n = 4)	Brand Director, Marketing Director, Director of Communications
	Energy (n = 2)	Director of Communications, Senior Vice President for External Communication
	Entertainment (n = 1)	Marketing Director
	Financial services (n = 1)	Director of Communications
	Food (n = 5)	Marketing Director, Director of Communications, Head of Digital
	Home furnishings (n = 1)	Marketing Director
	Insurance (=2)	Marketing Director, Director of Communications
	Luxury (n = 2)	Marketing and Brand Director, Marketing Director
	Personal care (n = 2)	CEO, Director of Communications
	Restaurants (n = 1)	Director of Communications
	Retail (n = 2)	Director of Communications
	Telecommunications (n = 4)	Head of Media Strategy and Planning, Head of Marketing Communications, Marketing Director
Communication partner (n = 46)	Tourism (n = 1)	Chief Marketing Officer
	Traditional agency (n = 14)	Vice-President, CEO, Creative Director, Account Director, Managing Director
	Digital agency (n = 12)	CEO, Marketing Director, New Business Developer Manager
	Media centre (n = 10)	CEO, Managing Director
	Broadcaster/Publisher (n = 10)	CEO, Marketing Director, Digital Media Manager, New Media Marketing Director

simplify the analysis according to the objectives, we considered only two types of relationships (Swan, 1997): causal links (A influences/causes B) and category links (A is a part of B/is included in B).

- 4) *Final design of the collective cognitive map* (Swan, 1997), a holistic model resulting from a systematisation of the main positions that emerged in a single cognitive framework to facilitate a cross-reading of the change in perception among the 86 experts (Figs. 1 and 2).

To answer RQ3, a qualitative content analysis was conducted to elicit the main points of specificity in the meanings associated with the concepts previously identified as map nodes (key innovation variables and managerial challenges). For each concept, therefore, the texts grouped into the five categories of players were compared.

NVivo 9[®], a qualitative data analysis software package, was used to aid the process of analysis through coding and initial visual modelling (Bazeley, 2007). The design of the cognitive map was performed with the assistance of Decision Explorer[®] software (Eden, Ackermann, & Cropper, 1992).

2.4. Reliability check

The process involving the inductive definition of codes (thematic categories) was conducted separately by two members of the research team who compared, discussed and aligned the results at the end of the coding process. In accordance with King and Horrocks (2010), this choice was motivated by the fact that persons within the team possessed greater contextual knowledge of the data, which was useful in developing a comprehensive and in-depth discussion of the definition and articulation of the codes. To

ensure an adequate level of reliability of the results, the so-called 'code-confirming' strategy was adopted, involving three independent coders who were all trained experts in the subject matter. The coders were provided with the transcriptions and related codes (i.e., the units of analysis associated with the thematic categories) and were charged with confirming the associations. *Interjudge reliability* was calculated through the so-called 'agreement ratio' (the number of agreements divided by the number of decisions made by each coder), which proved satisfactory (87%).

To enhance the quality of the study with respect to the credibility of the results, the framework was presented and discussed with five of the interviewees, each of whom belonged to a different category. The experts who were consulted at this stage of the study validated the results that were obtained.

3. Findings

As expected, the description of the results relies on the 'collective conceptual map', which is useful for representing only the beliefs that were most shared by the respondents (Swan, 1997). Fig. 1 illustrates the collective map representing the key innovation variables and the relationships among them (causal links or category links) (RQ1) and the resulting managerial challenges (RQ2). To overcome the main limitation of the collective map (i.e., the loss of individual perspectives), the qualitative analysis of the results also refers to specific positions of the interviewees, when appropriate, to highlight the main specificities in the perceptions of respondents belonging to distinct categories (RQ3). Consistent with the objective of this paper, the presentation of results will primarily focus on the challenges posed by the paradigm shift in IMC, which advertisers and communication players have not yet fully addressed.

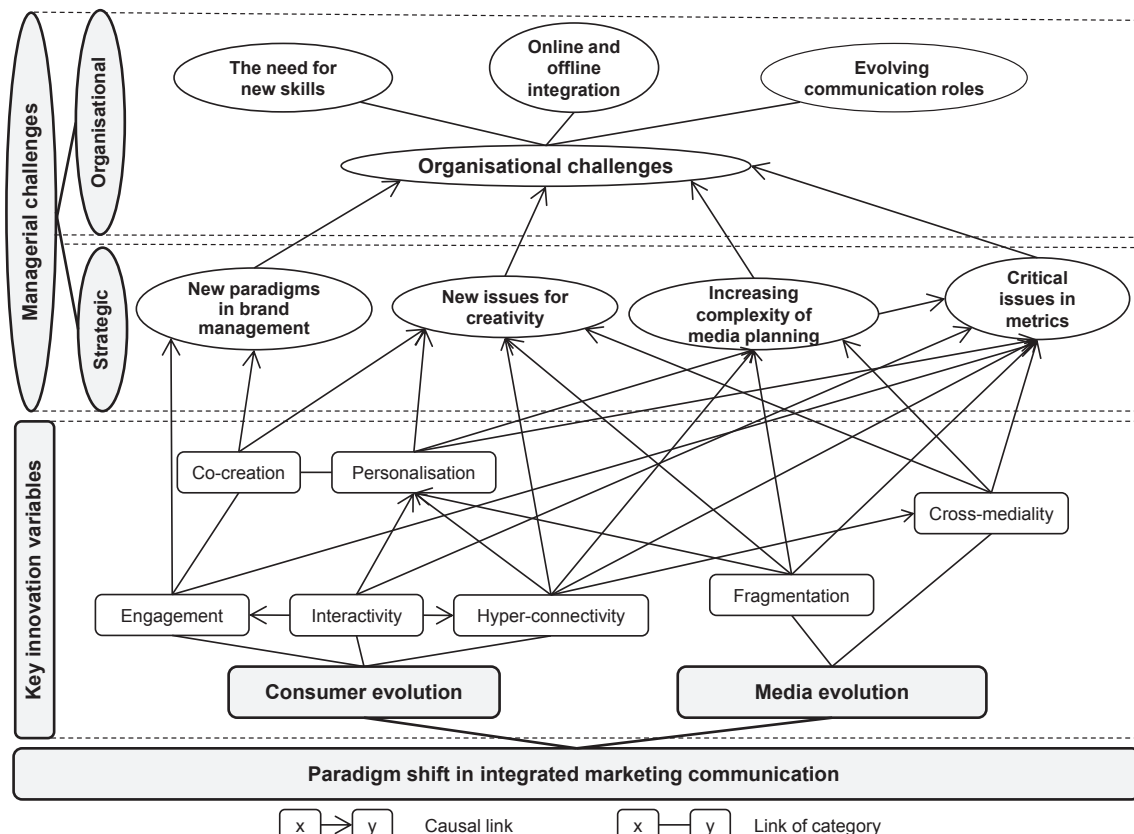


Fig. 1. IMC paradigm shift: a holistic vision.

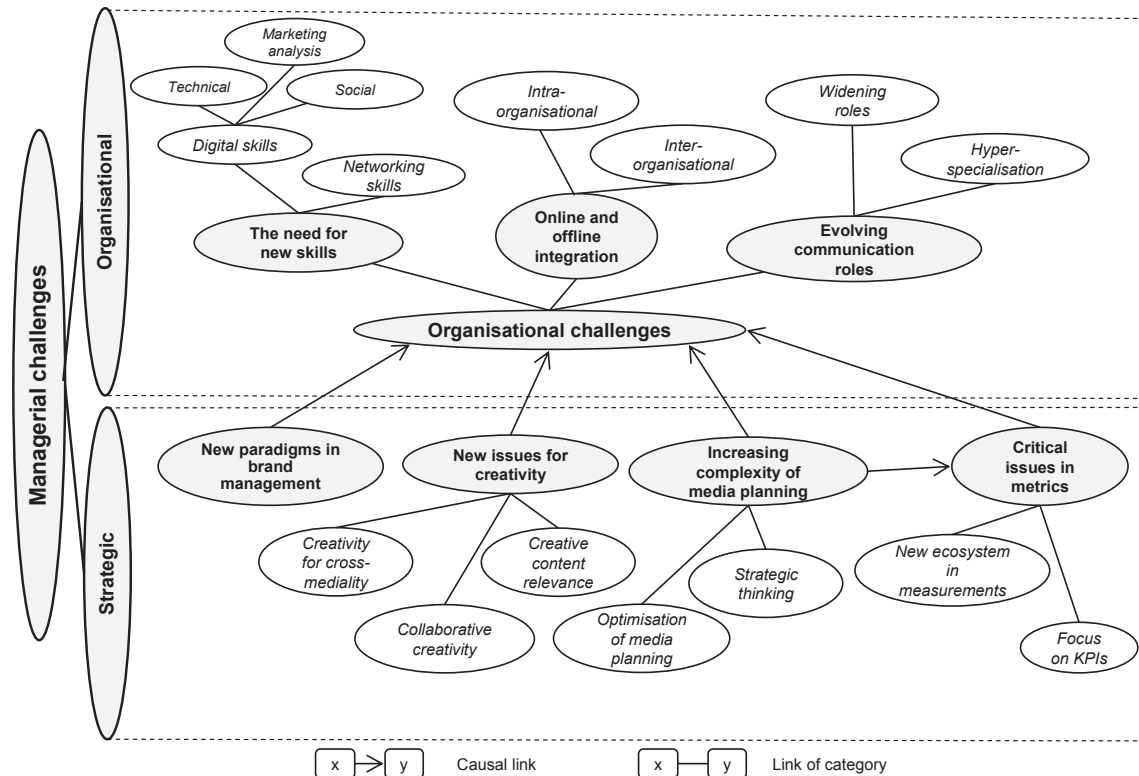


Fig. 2. Strategic and organisational challenges in the IMC paradigm shift.

3.1. Key innovation variables

According to the participants, the paradigm shift in IMC can be explained through several innovation variables that are connected to two fundamental conceptual dimensions: the *consumer evolution* and the *media evolution*. The consumer dimension is more directly linked to behavioural changes in individuals who are aware of their desire to be communication protagonists, whereas the media dimension is more directly linked to the technological innovation of media.

- The consumer evolution

The consumer dimension of the paradigm shift appears to be composed of certain key innovation variables (link of category), including the following:

- 1) interactivity;
- 2) engagement;
- 3) co-creation; and
- 4) hyper-connectivity.

Personalisation is an additional key innovation variable that is derived from interactivity and hyper-connectivity (consumer dimension) and from fragmentation (media dimension). For this reason, to better understand the incoming causal connections, personalisation will be discussed at the end of the description of both dimensions.

- 1) *Interactivity* is considered to be one of the main aspects of the IMC paradigm shift, representing the primary engine of change relating to collaboration and to a progressive convergence of the business and consumer worlds. Nevertheless, only the digital experts went beyond the concept of two-way, company-

consumer interactivity and connected it to multi-way communication. Interactivity is perceived to be an important factor that determines other variables: engagement and hyper-connectivity.

- 2) Most respondents interpret *engagement* in a broad and practical manner as a synonym for consumer activation and participation in the brand communication process. Consumer engagement seems to be determined by interactivity, and it is perceived and conceptualised with a focus on the experiential and social dimension. More specifically, engagement is substantiated in the user production and distribution of brand-related content (user-generated content) and in brand-centred interactions with other consumers. Common to almost all categories of players is the recognition of the relevance of engagement as a strategic marketing objective to reinforce the consumer brand-relationship based on dialogue. In this regard, the broadcasters and publishers expressed a more conservative attitude.
- 3) According to the conceptualisation of the interviewees, a category link joins engagement to *co-creation* (co-creation is a part of engagement). In the respondents' answers, co-creation assumed two different meanings. For some interviewees, especially those belonging to traditional agencies and media centres, co-creation is associated with the activity of crowd-sourcing, which envisages the involvement of consumers in the creation of advertising messages through creative online contests (creative crowdsourcing). In contrast, other respondents, especially those in the advertiser and digital agency categories, view co-creation as a broader concept. They believe that co-creation is linked to the direct intervention of consumers—whether spontaneous or solicited by the company—in the creation of content related to the brand, especially through owned or earned social platforms (e.g., Facebook brand fan page, corporate blog). The attitudes of the

interviewees differ with regard to co-creation. Indeed, the respondents from the traditional advertising agencies appear to be more cautious with regard to crowdsourcing. The broadcasters/publishers also appear to be sceptics.

- 4) Across all categories, but especially among the digital experts, the significance of an additional theme emerged: *hyper-connectivity*. At the centre of the new IMC scenario, the respondents see a hyper-connected consumer who is increasingly characterised by the often simultaneous or sequential use of multiple media (multitasking) as well as by anytime, anywhere and any-device exposure (always on).

- The media evolution

From the interviewees' perspective, the *media dimension* is divided (category link) into the following key concepts (Fig. 1):

- 1) fragmentation;
- 2) cross-mediality.

In contrast to the responses regarding the consumer dimension, no particular differences were identified among the players interviewed with regard to the media dimension. In fact, a general consensus prevailed regarding the relevance and meaning of these variables and the relationships among them.

- 1) The respondents considered *fragmentation* to be primarily associated with channels, languages and targets of communication.
- 2) *Cross-mediality* is considered an important concept that the respondents associated with both the 'technological hybridisation' of channels, which permits synergies to be exploited, and the consistent variation of marketing content in various media.

Finally, many respondents considered *personalisation* to be the future of marketing communication, and it belongs to both the consumer and media dimensions because it could be the result of different drivers. Thus, two meanings of personalisation can be identified: (a) push personalisation, if generated by the fragmentation of the media, is interpreted as the ability to send increasingly profiled, contextualised and geo-localised communication messages (e.g., retargeting, real-time marketing, mobile advertising); and (b) pull personalisation, if influenced by the new role of the consumer, who chooses not only the mode of use of communication but also whether and which content to co-create (e.g., user-generated content on a brand fan page). The first perspective is highlighted by advertisers, media centres, advertising agencies and broadcasters, whereas digital experts are more oriented towards pull personalisation, which is facilitated by the interactivity of engaged users.

3.2. Managerial challenges

Based on the consumer and media evolution depicted above, we identified two fundamental categories of managerial consequences, namely, strategic and organisational challenges (RQ2). The former consists of challenges that give rise to major organisational challenges through a causal link (Fig. 2). The latter are considered to lie at the heart of the paradigm shift in IMC.

To answer RQ3, we analyse the main points of specificity regarding the managerial challenges from the perspective of the various categories of players.

3.2.1. Strategic challenges

The following key strategic challenges were conceived by the interviewees:

- 1) new paradigms in brand management;
- 2) new issues for creativity;
- 3) increasing complexity of media planning; and
- 4) critical issues in metrics.

1) New paradigms in brand management

According to the interviewees, engagement and co-creation imply the necessity of adopting new brand management paradigms based on the effective establishment of a dialogue with stakeholders marked by a high degree of openness and transparency. This challenge is particularly felt by advertisers and traditional agencies.

- Advertisers

Many advertisers believe that a new logic of brand management is imposing itself in new participatory contexts. Indeed, a brand no longer belongs only to a company itself but is the result of processes of co-creation enacted by consumers. If brand management is not oriented in this direction, then companies assume the risk of losing control of their brands because such conversations are being held by others. Nevertheless, the decision to be open to dialogue is not yet fully accepted by many advertisers because of the lack of 'open culture'.

'The company must think at length before accepting the challenge of opening up to dialogue because there is no turning back once it is done. The knowledge of the consumer must be total to know how to manage possible reactions that do not go in the desired direction' (Marketing Director, Advertiser).

Moreover, to confront the challenge of 'openness', advertisers consider it essential to have strategic and operational support, particularly from traditional and digital agencies.

- Communication partners

For the majority of communication partners, openness to dialogue does not pose a problem of greater loss of brand control compared with previous experience. Nevertheless, many communication partners confirm the reluctance of some advertisers to adopt the logic of openness. Frequently, a firm's corporate culture is not yet completely ready to adopt this approach.

'Many businesses operate defensively; they are frightened of creating a transparent relationship, [and] they have difficulty knowing whether or not to accept this direct comparison because of the problem of criticism and the fear of losing control over the brand' (CEO, Traditional agency).

Because many advertisers are still not prepared to address this challenge, the traditional agencies recognise that they can seize new opportunities by offering innovative services such as social listening and conversation management with creative and engaging content. In fact, according to the agencies, it is a question of evolving in their role as communication consultants at the strategic level to be able to offer an integrated, long-term vision. However, they believe that digital agencies are too specialised in online communication and concentrate more on tactical aspects.

The *digital agencies* consider innovation in brand management

to be a specific area of their core business and regard themselves as the key partners of advertisers, including for training.

2) New issues for creativity

In the new communication scenario, creativity must address new challenges that depend on both the media (fragmentation and cross-mediality) and consumer variables (co-creation, hyper-connectivity and personalisation).

The following main issues are highlighted by the respondents:

- the relevance of creative content for consumers, who expect to receive *ad hoc* communication (the right message for the right consumer at the right moment);
- creativity adaptation for cross-media campaigns, which concerns the ability to adapt creative content to the specifications of each medium without losing the underlying coherence; and
- collaborative creativity, which is related to creative crowd-sourcing or to user participation in brand storytelling. The creative phase expands over time and space and always finds new ideas in brand conversations, thus assuming a more dynamic character.

These challenges related to creativity are perceived by all communication players, with specific views in each category.

- Advertisers

Fragmentation and personalisation pose a new issue, which is the relevance of messages to consumers.

'The pulverisation of targets and the fact that the consumer is always connected, wherever he is, forces us to try to create really relevant content, not only for the specific target audience but also for the specific situation in which marketing communication takes place' (Marketing Director, Advertiser).

Moreover, the advertisers claim that there is a need for creative consultants who are capable of managing cross-media campaigns and meeting the challenges involved in collaborative projects. The respondents frequently emphasise that this need is not fully met by the agencies' current *modus operandi*.

- Communication partners

As reported by the *traditional agencies*, cross-mediality determines a possible trade-off between the 'big idea' and the adaptation of creative content to various media. The big idea, which remains central, must become more flexible and dynamic to engage consumers at the different points of contact.

With reference to the challenge of collaborative creativity, some traditional agencies that have always centralised their creative activities tend to demonstrate caution, perhaps in an attempt to defend their professionalism.

'We must listen and be able to understand the stimuli that come from the users, but then we have to reinterpret these stimuli, transforming them into real creative content!' (Creative Director, Traditional agency).

In contrast, a positive attitude towards greater openness and collaborative creativity (for example, through creative crowd-sourcing) prevails among the other players, such as *media centres* and *digital agencies*.

According to the *media centres* and *digital agencies*, the challenge of the relevance of creative content generates a great business opportunity linked to the use of data to monitor and meet the needs of consumers by delivering tailored marketing content. In collaboration with traditional agencies, media centres and digital agencies could offer new forms of 'data-driven creativity', such as retargeting.

Finally, the *broadcasters/publishers* perceive the challenge of creativity in terms of the construction of relevant cross-media content by offering innovative editorial contexts in close collaboration with advertisers, agencies and media centres.

3) Increasing complexity of media planning

According to the respondents, both consumer (hyper-connectivity and personalisation) and media variables (fragmentation and cross-mediality) are leading to an increase in the complexity of media planning. Based on the responses, two fundamental issues can be distinguished: the concern for optimising media planning and the need to strengthen the strategic vision in the integrated management of media. This challenge is particularly felt by advertisers, media centres and broadcasters/publishers.

- Advertisers

Many advertisers emphasise the difficulty of managing media fragmentation without losing communication effectiveness. In addition, the phenomenon of people who are always on and multitasking presents the challenge of improving the structure of media plans to account for consumers' increased knowledge.

'More and more it becomes important to find the person, no longer the "target", at the right time in the right situation with a relevant creative message. This allows us to increase the communication effectiveness and to optimise our shrinking communication budget' (Director of Communications, Advertiser).

For advertisers, the increasing complexity in planning generates the need for media consultants with greater strategic expertise. Such expertise is necessary to ensure effective integrated content delivery that creates consistent brand experiences that are relevant to consumers.

The advertisers emphasise the importance of the media centre, but similar to the case of creativity, sometimes companies experience delays on the media planning front. In fact, the formal efforts of media centres to establish cross-media plans do not appear to translate into an effective integration of digital and traditional media. The problem, as noted by advertisers, is that media centres are risk averse.

- Communication partners

Regarding the issue of optimisation, the *media centres* underline that they are called upon to use innovative techniques for planning (e.g., data-driven planning such as behavioural targeting and retargeting) and buying (e.g., automation with programmatic and real-time bidding).

'The traditional model of advertising planning cannot prevail any longer! A model of always scheduling the same blocks of media for six months, defining the audiences on the basis of age, gender and little else ... Today, and even more tomorrow, media planning should be based on the factors that really influence the brand experience in a particular time and context. Behavioural targeting,

for example, responds to this type of need'. (Managing Director, Media centre).

According to the media specialists, their willingness to innovate appears to be constrained by clients' emphasis on short-term results, which contrasts with the views of advertisers.

The *broadcasters/publishers* also feel fully involved in the challenge of optimising media planning. For this reason, these players are experimenting with innovative and data-driven proposals such as 'human planning' (i.e., advertising planning based on the analysis of value profiles of users and on matching these profiles with the value profiles of editorial contexts).

4) Critical issues in communication metrics

According to the interviewees, both consumer (e.g., engagement, hyper-connectivity) and media (e.g., cross-mediality) variables raise critical issues in communication metrics. In this regard, the following challenges are perceived as the most significant:

- the creation of a new ecosystem in measurements (i.e., a system that integrates traditional and digital metrics to facilitate assessment of the media synergies in campaigns and to overcome the problem of fragmentation);
- greater focus on advertisers' objectives and KPIs.

These challenges are relevant to all respondents, but as before, some views appear to be specific to each group.

- Advertisers

The advertisers express a need for more integrated measurements between online and offline that can be shared within the industry. They would also like to see the simplification and rationalisation of metrics.

'Today we have too many metrics that speak different languages, and in the end we are not really able to grasp their utility ... maybe all the new metrics, which we sometimes get so excited about, only create confusion in the end and do not really help us to make decisions ...' (Marketing Director, Advertiser).

The advertisers also expressed the need for conversion indicators that link communication investments to sell-out KPIs, given the growing need to optimise plans with shrinking budgets.

- Communication partners

According to the *traditional agencies*, the new ecosystem in measurements should be based on the rationalisation of metrics and on greater weight for qualitative information. With regard to the first point, the respondents note that in the digital world, there is an excessive 'dispersion' of metrics, attributing responsibility in this regard to digital agencies. With reference to the second point, for many agencies, the prevalent use of quantitative metrics risks 'mortifying' the emotional value of creative content.

The *media centres* perceive the challenge of measurements as a great opportunity, having distinctive expertise in the collection, management and interpretation of data to be transformed into actionable insights. To support clients in strategic thinking, media centres should propose measurement systems that are more centred on advertisers' KPIs.

According to the *digital agencies*, identifying a currency for cross-platform measurement that can describe different

media—traditional and digital—with similar measures (e.g., 'e-grp's') is crucial. In addition, digitisation allows businesses to strengthen their information systems by taking advantage of big data. Many digital experts emphasise that these data must be completely integrated into business databases to better understand customers and prospects, to support decision making and to improve communication efficiency and effectiveness.

3.2.2. Organisational challenges

All of the aforementioned strategic issues generate relevant organisational challenges that play a central role in the current IMC paradigm shift. In this field, the primary challenges depicted by the interviewees are the following:

- 1) the need for new skills;
- 2) online and offline integration; and
- 3) evolving communication roles.

1) The need for new skills

The response to the strategic challenges outlined above should be primarily based on the development of *digital* and *networking* skills.

Digital skills are considered by respondents in three main headings:

- technical skills, which are necessary to understand and manage the peculiarities and critical issues of digital media;
- marketing analysis skills, which are critical to transforming the increasing amount of data generated by hyper-connected consumers into actionable insights; and
- social skills, which are necessary to deal with the new paradigms in brand management by involving the brand in credible conversations with consumers.

Networking skills are necessary to facilitate dialogue among an increasing variety of communication specialists and to effectively coordinate the activities of all players involved in integrated campaign development.

Although it is experienced across the board by all player categories, the need for new skills assumes different meanings and priorities for each group.

- Advertisers

Advertisers, while recognising the importance of partners, consider it essential to also have new technical skills on the inside (to some extent) to better assess the projects proposed by communication partners.

'We need to have the in-house technical skills to manage these new channels, to know how to use them, how they should be handled, where the best investment solutions lie, etc. We can outsource to a communications agency, but it is necessary to have the skills in-house to speak the same language' (Communications Director, Advertiser).

Additionally, to better use the insights derived from big data, it is necessary to develop new marketing analysis skills.

'Communication decisions—and other types of decisions—are increasingly data driven. We have a huge amount of data, but we still need to understand how to best use it. It is for this reason that professionals such as digital analytics managers will be increasingly important in organisations' (Head of Digital, Advertiser).

In addition, new strategic challenges also require the acquisition of new social skills to promote listening and continuous dialogue (365 days a year, 24/7) with hyper-connected users while complying with conversational rules (i.e., times, tone of voice). In doing so, there is a need to adopt new professional figures such as the social media strategist, the community manager and the digital PR manager.

Finally, in an increasingly complex communication network, the development of *networking skills* is necessary to effectively conduct coordination among communication partners.

'Advertisers must be increasingly more capable of putting together a heterogeneous group composed of specialists of all the various media. The communications manager must play a much more active role than in the past in promoting coordination between the company and its communication partners' (Marketing Director, Advertiser).

- Communication partners

According to the *traditional agencies*, technical skills are also fundamental for creatively using opportunities of digital media at both the strategic and operational levels. In addition, to respond successfully to the challenge of the new paradigms of brand management and to strengthen their role as strategic partners, these agencies should acquire social skills and new professional profiles, such as the social media strategist. Finally, agencies are also considering the need to strengthen their networking skills to promote cross-agency partnerships and to coordinate the work of a growing number of specialists.

According to the *media centres*, acquiring technical skills is increasingly challenging, but the real issue in this area concerns the development of new marketing analysis skills to pursue a 'richer human understanding'. The current business environment involves strengthening among analytics departments and increased multidisciplinary through the growth in the variety of talents and specialisations.

Given their professional focus, the *digital agencies* view themselves as playing the role of promoters of innovation in communication networks and as the preferred partners of advertisers seeking external technical experts (e.g., SEO specialists) and digital marketing training consultants. Finally, the digital agencies highlight the persistence of a 'lack of digital skills' at the strategic level among advertisers: top management often does not have full knowledge of how marketing principles have changed as a result of the digital revolution and what business opportunities the new communication tools may have to offer.

2) Online and offline integration

In the new scenario, a great challenge is the online and offline integration in IMC, which is considered from two perspectives:

- *inter-organisational*, perceived as crucial by all categories of respondents;
- *intra-organisational*, particularly relevant to advertisers, traditional agencies, media centres and broadcasters/publishers.

The interviewees highlighted a widespread need for everyone to commit themselves to improving the *inter-organisational integration* through the development of a more widespread culture of collaboration among all players. The interviewees cited many examples of the need for greater collaboration between the agency and advertiser (e.g., for the development of brand openness), the

agency and media centre (e.g., for cross-media creativity), the media centre and broadcaster/publisher (e.g., for the optimisation of media planning), and the advertiser and publisher (e.g., for the production of *ad hoc* editorial content for the brand).

Conversely, with regard to *intra-organisational integration*, some perspectives are specific to each category.

- Advertisers

According to the advertisers, to establish *online and offline integration*, new organisational configurations are required. First, organisational solutions that favour *cross-functional coordination* are needed (e.g., between digital functions and CRM). Second, it is necessary to create *mixed working teams* to gather diverse expertise as well as senior professionals with greater managerial skills and junior professionals with greater technical skills.

'A better integration will result from the intermingling of old and new knowledge and the varying competencies that arise when team members exhibit a diverse range of professional experience and seniority. Managerial skills are always needed for the better identification of objectives and for the definition of communication strategy; technical skills are needed to use new media for the realisation of those goals. Today, we rarely find people who already have both of these skills' (Marketing Director, Advertiser).

Finally, the success of the integration challenge is regarded as closely related to *top management commitment*. To this end, top managers must enrich their strategic managerial expertise with a strong digital culture.

- Communication partners

According to the *traditional agencies* and *media centres*, integration can be achieved primarily through the establishment—even for specific projects—of mixed teams in which data specialists work with creatives, for example. In the agencies that belong to large international groups, the formation of these working teams often draws on different specialists from within their wider network. Again, the development of integrated strategies should start with top management.

'Online and offline integration is often perceived as an emerging, bottom-up path. Instead, integration should be a top-down path coming from top management' (CEO, Media centre).

Finally, for the *broadcasters*, the integration challenge is still highly relevant in having a potential impact on the business model. This challenge could be a serious issue for survival, particularly for a traditional player (e.g., print broadcaster).

'The only broadcasters that will survive will be those who become media companies, going beyond the logic of the individual channels, taking an integrated view of the old and the new platforms by offering cross-media products' (CEO, Broadcaster/publisher).

3) Evolving communication roles

The paradigm shift in IMC also generates a trend in changing communications roles: the majority of the respondents emphasise that actors in the network are beginning to experiment with a new distribution of roles in communication activities. In particular, two main issues are mentioned:

- the *widening roles* of some players towards activities in which other professionals engage in the communication network;
- *hyper-specialisation* in particular activities of the communication process.

- Advertisers

The advertisers emphasise the greater range of their communicative role that is increasingly overlapping with the role of publishers. Using proprietary platforms that will enable them to produce editorial spaces and content (e.g., owned media such as corporate blogs), advertisers are seeking clear editorial positioning.

'The brand becomes a publisher: the company starts producing both the content and the container through which it is conveyed' (Marketing Director, Advertiser).

- Communication partners

The respondents belonging to *agencies*—both *traditional* and *digital*—showed opposing trends. Some are widening their activities to offer media planning. Simultaneously, the opposite trend is highlighted in the direction of hyper-specialisation in communication activities with the rise of newcomers in the network (e.g., creative boutiques, display advertising agencies, trading desk agencies).

The *media centres* are addressing the role expansion issue and, in many cases, are working on offering creative content (especially digital content). According to some of the respondents, this would be the natural evolution of the role as distributors, integrators and measurers as a result of the new skills developed in digital communication in recent years.

The *broadcasters* also state they are increasingly involved in the construction of relevant creative content, developing internal creative structures in close collaboration with advertisers.

With respect to the challenge of widening roles, the majority of the respondents from all categories acknowledge the new fundamental role of the consumer, who becomes the author (content creation) and the publisher (content delivery) of brand stories, entering fully into the communication network. While the *digital agencies* feel more prepared, as they have always had this new 'player' at the centre of their business model, other categories (those that are not 'digital natives') are still trying to find the optimal approach to meeting this challenge.

In a world of evolving communication roles, the key word for all players is 'experimentation'.

4. Discussion and academic contribution

Our study fits into the nascent academic literature on the evolution of IMC (Kitchen & Schultz, 2009; Schultz & Patti, 2009), contributing primarily to shedding light on the managerial challenges posed by the IMC paradigm shift based on practitioners' perceptions. The communication network has been studied extensively; this examination has not been limited to advertising agencies and advertisers, as is often the case in the existing IMC literature (Kliatchko & Schultz, 2014), but we have also considered media centres, digital agencies and broadcasters/publishers.

To the best of our knowledge, this study is the first attempt to 1) propose a holistic conceptual model that systematises practitioners' perception of the IMC paradigm shift, largely in terms of managerial challenges across the different categories of players in the network; 2) identify the different types of managerial challenges, both strategic and organisational; and 3) analyse the main specificities in practitioners' perceptions based on the different

player categories.

Cognitive mapping has shown that practitioners are deeply aware of the IMC paradigm shift, including several macro-variables related to the consumer and media evolution, in line with the academic literature (§ 1.1). The study further finds the causal relationships between the aforementioned key innovation variables and managerial challenges, to which all professionals have devoted a great deal of attention. Managerial challenges are conceived in two related ways: strategic and organisational. The former are conceptualised as new paradigms in brand management, new issues for creativity, increasingly complex media planning and critical issues in communication metrics.

Regarding the *new paradigms in brand management*, the issue of 'brand openness' is recognised as a necessary response to the evolution that is occurring, but it is perceived as a challenge that has not yet been fully addressed. Our findings contribute to the literature (Fournier & Avery, 2011; Gensler et al., 2013) by revealing widespread problems, especially for advertisers, in understanding and implementing the new rules of transparency and conversation.

Moreover, our study fits into the research on the future of creativity (Ashley & Oliver, 2010; Belch & Belch, 2013), shedding light on the main challenges in this field and outlining how traditional agencies have yet to overcome fully the old centralised logic. In fact, creativity is being asked to evolve rapidly, being stimulated by significant key innovation variables such as cross-mediality, which creates pressure to develop more flexible big ideas, and co-creation, which calls for creative processes to become more dynamic while expanding in time and space.

With respect to the *increasing complexity of media planning*, we contribute to the literature by highlighting both the need for stronger strategic thinking and the more operational need to optimise plans. These needs arise not only because of ongoing technological change but also because of the constantly changing ways in which consumers interact with media and the consequent shift from the target media to the individual.

The challenge of *metrics*, despite being given central importance by all players, has not yet been fully grasped, with the debate on the development of a new ecosystem in measurements remaining very heated (Rappaport, 2014). According to the respondents, there are currently no measurement frameworks that are shared within the industry and clearly structured around precise objectives and KPIs. In addition, the proliferation of metrics has given inadequate attention to qualitative aspects.

All of the interviewees regarded these principal strategic challenges identified by the research as determinants of organisational challenges: the need for new skills, online and offline integration and evolving communication roles.

According to our results, the communication network contains a widespread *skill gap*. We contribute to the literature in this field (Leefflang et al., 2014; Royle & Laing, 2014) by shedding light on the dual nature—strategic and operational—of the gap and the specific skills required. At the top management level, there appears to be a lack of digital culture, whereas at the executive level, there are gaps in technical, analysis and social skills. In addition, the explosion of specialisations, activities and players creates the need, especially for advertisers and traditional agencies, to develop networking skills and to strengthen the culture of collaboration, which is also useful for promoting inter- and intra-organisational integration. With specific reference to the challenge of *online and offline integration*, we showed that all players are experimenting with new possible organisational configurations, such as mixed working teams.

Finally, although the challenge of *evolving communication roles* remains under-investigated in the literature (Hipwell & Reeves, 2013), it is central in the paradigm shift outlined in this study, as

it is driving network reconfiguration in ways that are still not clearly definable by the respondents and not yet outlined by scholars.

5. Conclusions

The reported findings have managerial implications that may be translated into a series of recommendations for all actors.

Traditional agencies should decisively respond to the challenges generated by the consumer evolution and develop digital skills, particularly of the social type, to support advertisers in the difficult process of creating brand openness. In addition, agencies should develop new creative skills and new languages and modes (e.g., conversation, crowdsourcing) of compelling content production that is adapted to the various media, thereby continually stimulating their creative professionalism by venturing into new experimental territories.

To meet the challenge of the increasing complexity of media planning, *media centres* should focus their business models simultaneously on the advertiser and the consumer. Such centres should offer an integrated view for advertisers, playing the role of strategic consultants rather than short-term communication specialists. Moreover, media centres should continuously innovate in consumer data-driven planning and buying, in view of not only greater efficiency but also greater added value for the consumer. The new issues in media planning have strong repercussions for the metrics challenge, in which media centres are fully involved. These players, in fact, should be promoting the development of a more rigorous ecosystem of metrics.

Given their key role in the innovative management of brands and new planning techniques, *digital agencies* should develop their training role, especially to offer support for advertisers in the transition to digital culture.

Finally, *broadcasters/publishers* should understand the direction of change, collaborate more closely with advertisers and media centres, innovate and promote cross-media editorial products evolving towards a media company business model.

The organisational challenges involve all players in the network, especially *advertisers*. In particular, to meet the digital skills challenges, all players should engage in ongoing training, both those in top management and those at the executive level. It also becomes important to succeed in acquiring the best talent to grow internally as well as to choose partners with care.

Regarding the challenge of online and offline integration, advertisers should strengthen the role of integration architects both internally and externally in order to communicate more coherently. Internally, it is essential to find organisational solutions that can break the 'silos', primarily by developing a strong digital culture throughout the organisation combined with solid managerial expertise. Externally, advertisers should foster collaboration (rather than competition) among different communication partners and stimulate innovation throughout the entire network (networking skills).

All players should increase their efforts to establish a constructive inter-professional dialogue based on the 'collaboration culture' because only with greater collaborative efforts and a 'new alliance' among partners can the challenges of the IMC paradigm shift be addressed to yield benefits for all involved.

6. Limitations and further research

This study has various limitations. The first concerns the breadth of the horizon surveyed, which does not permit us to investigate individual perspectives in depth. However, this aspect is also one of the strengths of the work: the broad framework developed on the

basis of a 'holistic' vision of communication players offers researchers a road map for the future study of specific issues, especially strategic and organisational challenges. We recommend deep exploration of the specific managerial challenges and issues confronted by each category of players, and we call for analysis of the effects of the IMC paradigm shift on industrial inter-company relations, for which research is in its infancy (Grant et al., 2012; Grant & McLeod, 2007). Recognising the centrality of the development of communication roles in ways that are still being developed and are not clearly defined, we call for research to shed light on new possible communication network configurations.

Some limits of the method must be recognised: the qualitative nature of the study based on in-depth interviews and the sample frame do not permit generalisation of the results. In addition, the research was focused on a single European country; therefore, a future line of research continuing from this study could aim to investigate the IMC paradigm shift in the context of different cultural and institutional backgrounds. Finally, it must be emphasised that the implications of the study should be analysed by considering some important moderating variables, such as the size of the advertisers considered (only large companies) and consumer involvement in different product categories.

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