

Key marketing and media agency trends in South Africa

Agency Scope 2021/22 has revealed some key trends in the evolution of the South African advertising, marketing and media market.



Source: © raw pixel [123rf](#) The Agency Scopen has revealed some key trends in the SA agency market

Agency Scope 2021/22 is the fourth edition of the study since 2016 in South Africa. The results were revealed earlier this year to subscribers of the report.

“It seems like just yesterday we were learning things about marketers and their agencies we’d never asked before,” says Johanna McDowell, CEO of the Independent Agency Search & Selection Company (IAS) and Scopen partner.

“Eight years have flown by, and with every *Agency Scope*, we’ve watched our markets evolve.”

It has, says McDowell, been a riveting experience for all stakeholders, with everyone involved taking something away that serves their business and encourages a view of the industry with new eyes.



Agency Scope 2021/22: Trends, tactics and triumphs

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- **Representing the full industry**

Cesar Vacchiano, president and CEO of independent research and consulting firm Scopen, says a key highlight from a South African perspective is the growth in sample size and the marketers and agencies involved.

“We have grown our sample from the largest marketers in 2016 to a broad spectrum of marketers in South Africa,” says Vacchiano.

“After eight years, *Agency Scope* represents the full industry. From a few agencies subscribing to the first edition, we have subscriber agencies from all the holding groups and all the largest independents, and agencies with headquarters in both Johannesburg and Cape Town,” Vacchiano adds.

- **Largest media agency participation**

Vacchiano notes that media agencies were the most reluctant to subscribe to the study initially.

“Their operations are smaller in South Africa when compared to other markets, and they are mainly involved in media planning and buying. But *Agency Scope* 2022 achieved the largest media agency participation in the study.”

- **Digital investment increased**

The growth of digital investment has increased exponentially in 2021 as a consequence of Covid-19, as it has in other countries,” says Vacchiano.

McDowell agrees that agencies have stepped up their digital capabilities and boosted their understanding of data, tools, platforms and channels.

- **More decision-makers, more women**

Both note that almost 500 key decision-makers were interviewed in 2021, a real triumph as that sample size offers a solid base of information for leaders of agencies and brands to count on in uncertain and complex times.

“We noticed a move of brands, businesses and agencies to Johannesburg and fewer bigger agencies in Cape Town,” Vacchiano asserts.

He highlights that two-thirds of leaders interviewed on the client side are women, as are half of the most admired marketing professionals. “It’s a long way to come from our first edition when men were mostly mentioned.”

- **Number of partners increased**

Another interesting finding is that the growth of digital and technology and new platforms, has increased the number of partners brands are working with.

“Marketers locally now have, on average, 13 different partners including agencies, digital platforms and other marketing services providers. This number will continue to grow in the future,” says McDowell.

“The selection of an adequate ecosystem of partners as well as managing the relationships between those partners has become a great challenge for CMOs,” she says, adding that choosing a lead agency also presents a challenge as it has a key role in helping CMOs make the collaboration happen between all partners.”

- **Core business focus**

Here, Vacchiano says *Agency Scope* shows that even though creative agencies in South Africa have reinforced their digital capabilities, they are still largely focused on their core business disciplines and territories.

“In other regions agencies of all types are looking to offer more and more integrated services, growing in branded content, shopper marketing, marketing automation, brand experience and activation, and public relations and Influencers,” he says.

“Improved capabilities and strengths in all these sectors bring opportunities to grow organically or attract new clients with different needs from those that they have been working with.”

- **Strategic planning gaining relevance**

He also notes that strategic planning as a service offering is gaining relevance, not only in South Africa but globally.

“In many countries, it is the first factor considered when selecting agencies and a key attribute in defining the ‘ideal’ agency. Planners are a scarce resource, and something marketers are starting to value sometimes even more than creatives.”



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Agency Scope adding value

McDowell argues that while business activity decreased during the pandemic, this is changing rapidly and agencies must show how they have adapted their capabilities during the last two years.

“Marketers have new requirements and must determine whether their own agencies or others can help meet these needs effectively.” She reiterates the value of watching marketers and agencies evolve over the last eight years, not only to intermediaries like the IAS, but to each stakeholder she deals with across the industry.

“Proof of *Agency Scope*’s value is in how much awareness there is about the product, even compared to a few years ago, and the practical applications marketers and agencies are finding in the research results,” she says.

On *Agency Scope*’s growth in South Africa, Vacchiano says: “I’m delighted when a new market is explored, we get the opportunity to trace its change and growth. As subscriptions in the country are on the rise, we know we’re providing research that makes sense to its users. And that’s the only research one can place real value on.”

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