South Africa
PR Country Landscape 2014

Global Alliance for Public Relations

and Communication Management

Acknowledgements

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Snapshot of the Profession

Origins

The public relations profession in South Africa has been – and will continue to be – influenced by the historical developments in the country. The transformation from an apartheid rule of racial segregation to a democratic state, where the rights of every South African is protected by the Constitution, provides Public Relations and Communication scholars and practitioners with an unique context in which to study and practice public relations and communication management. During the earlier years of public relations history, the South African government was instrumental in establishing the first public relations departments with the main purpose of disseminating government information. During the period 1957 to 1994 public relations in South Africa developed and evolved through different phases such as fundraising and publicity, press-agentry, more sophisticated two-way relational approaches and, ultimately, into management counsel and advice.

The field grew steadily during this period as a result of the developments in education and research, and the establishment of a professional body in 1957. During the 1990s the practice was dominated by the Excellence Theories, and this normative approach became entrenched to the extent that it still dominates the practice today. Recent research conducted by the University of Johannesburg on the philosophy of PR and Communication in SA suggests that South African PR and Communication practitioners are now shifting away from this normative behavioural-managerial approach towards greater reflection, and an 'other' orientation in the professional practice. This 'other' orientation manifests itself in a rejection of self-interest, consequence-based decision-making and paternalism as guiding principles for professional practice. There is also a clear shift away from serving the interests of the economically or politically powerful towards an inclusive integrative social role – thus suggesting some inquiry into personal accountability for actions.

Resources

There is a very strong emphasis on professionalism and continuous skills development by the Public Relations Institute of South Africa (PRISA), which represents the interests of the profession. In 2013 PRISA was recognised as the professional body for Public Relations, offering the following designations on the National Qualifications framework: Public Relations Practitioner (PRP), Chartered Public Relations Practitioner (CPR) and Accredited in Public Relations (APR). PRISA currently has 780 senior practitioner members, 90 accredited Public Relation practitioners (APR) and 1740 student members. Aside from PRISA there are several other professional bodies that serve the interests of the industry, as well as number of commercial organisations that provide services to the industry. There are also several universities that offer a range of qualifications in the field, and undertake theoretical and applied research to grow the South African body of knowledge.

Priorities

The profile of PR and Communication professionals has undergone significant change from a white male-dominated field to a racially transformed female-dominated field. While significant strides have been made in terms of transformation of the industry since 1994, transformation of the industry remains a problem for various reasons, including a paucity of talent and relevant skills.

Education levels have also improved, with various research studies indicating that the majority of senior practitioners now hold post-graduate qualifications. This is in stark contrast to the 1980s and 1990s when very few practitioners held formal qualifications in the field. Despite the improvement in the formal education levels of practitioners, the industry still does not have sufficient strategic competence; it is experiencing a shortage of certain specialised skills, such as digital and content development skills. The biggest challenge currently facing the industry is rethinking its business models to add strategic value and a measurable return on investment for its clients.

State of the Profession

Challenges

The discussion of challenges will encompass political issues, business conditions, legislative practice and technology trends.

Political Issues

Ethnic composition: Black Africans make up about 79% of the South African population, that also comprises Whites (9.6%), Coloureds (8.9%) and Indians/Asians (2.5%) (MarketLine, 2013:12). Traditionally, integration is limited in terms of socialising and interacting across racial lines outside of shopping centres, public transport, sporting events and public spaces is rare (Mackay, 2014:6). However, as the democracy matures, ethnicity as a divider is dissolving – especially among younger South Africans who tend to be colour blind, with the result that there a new multi-identity consumer with a new mindset has been emerging. Languages, for example, have become more open to influence from other local languages and colloquialisms have become embedded. One example that illustrates the point is MTN's (a South African based multi-national mobile telecommunications company) 'Ayoba' campaign, associated with the FIFA Soccer World Cup 2010, which was hosted by South Africa. 'Ayoba' originates from township culture (isiZulu street slang in this instance) and, loosely translated, means 'amazement', 'excitement', 'super-cool'. It became THE word associated with the World Cup for South Africans, and is still used today. This campaign won numerous awards and received enormous media coverage both locally and internationally.

Age: The Census survey of 2011, the latest survey available, indicated that about 31.3% of the population was younger than 15 years of age and only 7.7% was 60 and above. Mackay (2014:8) indicates that taking age into account is crucial for the forward momentum of the country, as those born after 1994 (referred to as the Born Frees) do not have the same preferences as their parents. Specifically young Black Born Frees have different emotional hooks than their parents (Mackay, 2014:6), since their parents and grandparents would have experienced the Apartheid era. Furthermore, Mackay (2014:13) writes that Black youth has more of an affinity with international organisations, feeling better understood by them, as often local organisations don't resonate with their emerging and fragmented identities.

Language: There are eleven official languages in South Africa. English, whilst only spoken by almost 5 million South Africans as their first language, is commonly used for official and commercial communication, despite the fact that isiZulu is the home language spoken by the

largest group of people (Government Communications, n.d.). Whilst being a globalised society, a swing towards de-globalisation is also becoming evident, as illustrated by the following examples: The inclusion of vernacular seems to be permeating the local communication campaigns of international brands; 10and5.com (2013) reported that DDB created McDonald's first ever isiZulu TV ad with English subtitles. Similarly, KFC used local success stories as inspiration for their new Streetwise Two campaign. One of the stories used was of a jeweller whose first ring was bought by a friend for just R30, but whose rings are now being sold for more than R1 000. "The idea behind the concept underpins the brand's philosophy that those who are 'streetwise' do not accept the status quo" (Biz-community, 2014). Both campaigns garnered wide publicity on both traditional and digital platforms, particularly in the social media.

Major religions: In South Africa Christianity dominates, with Protestants being in the overwhelming majority, whilst about 2% are Muslim (MarketLine, 2013:13). Ancestral religious affiliation makes up 5%, with Hindu 1% and Judaism 0.2% respectively (Statistics South Africa, 2014:32).

Cultural diversity: Given the diversity, it becomes essential to garner insights in order to harness the cultural richness that typifies South Africa's African, European, Indian and Chinese heritages. Most organizations in the fields of branding, advertising, public relations and corporate communication are aware of the need to practice Cultural Intelligence. With this being said, Yellowwood (2014:17) offers the concept of "inclusion of the excluded", which draws from the insight that for many years the majority of the population were denied access to, inter alia, numerous activities, places and experiences. Organizations therefore need to "supersize" relevant aspects of access to that which was previously denied – in other words, organizations should focus on incorporating internal and external opportunities for new experiences.

Poverty: The gap between rich and poor has increased despite all the reformative policies of the post-Apartheid government. In fact, South Africa, Brazil and China have the highest levels of income polarization, making them the most unequal societies, according to the OECD Secretariat (n.d.). The Multidimensional Poverty Index (MPI) indicates that at least 13% of the population can be classified as multi-dimensionally poor and 33.3% at risk of ending up being multi-dimensionally poor. While 13.8% of South Africans live below the income poverty line of $1.25 per day. The largest contributor to poverty was the poor health score obtained (United Nations Development Programme Human Development Report 2013:5). MarketLine (2013:71) stipulates that the average income of black households is one-sixth of their white counterparts, so poverty still affects more Blacks than Whites.

Gender equality: The Global Gender Gap Index (Human Development Report, 2013:4) ranked South Africa 90 out of 148 countries in the 2012 Index. This score was achieved for two reasons: (1) Women traditionally studied education, nursing and related fields, but there has been a shift to enrolling for business, commerce and management science. (2) Whilst the average annual household income over the past ten years has more than doubled, this is particularly true for female-headed households, because traditionally Black females had the highest levels of unemployment (Statistics South Africa, n.d.). However, Yellowwood (2014:17) is critical of the portrayal of women, because despite empowerment and the transcending of stereotypical female roles, "… so much marketing in South Africa boxes women in and speaks in amateurish, girly ways".

Education: Perhaps one of the most difficult legacies of Apartheid to overcome is the inferior education provided to Black learners, as it was aimed at ensuring that Black people remain at the level of the unskilled labourer. The government has made early childhood development for those aged 0-4 years a priority; however, as of 2013 only 34% of children in this age group were exposed to relevant formal programs (Statistics South Africa, 2014:10). School enrolment of those aged between 7 (first year of primary school) to 15 years (both genders) is just above 98% (MarketLine, 2013:3). The most cited reason for not continuing with studying is an inability to pay school fees. However, exemption from paying school fees, combined with other funding initiatives, is starting to take effect; it is anticipated that this will decrease the number of pupils who do not complete their schooling. 94% of pupils attend public schools, with about three quarters of them needing to make use of the feeding schemes offered at schools (Statistics South Africa, 2014:11). eNCA (2014) reported that, in terms of a World Economic Forum report, South Africa's mathematics and science education came last out of 148 countries. However, in terms of literacy, the population has almost a 90% achievement (MarketLine, 2013:72). In 2013, 27,7% of the pupils completed their secondary education (Statistics South Africa, 2014:11), but Census 2011 indicated that less than 12% gained a tertiary qualification. All these factors impact on South Africa's ability to compete in a knowledge economy, where there is a shortage of skilled workers.

Health: By far the majority of South Africans make use of public healthcare, as only 18.4% of people belong to a medical aid scheme (Statistics South Africa, 2014:11). The government, given the overwhelming burden placed on public healthcare, is implementing a National Health Insurance system to try and even out the demand on public and private facilities. Moreover, the government is looking at implementing a National Health system akin to the Australian, UK and France healthcare systems. Statistics South Africa (2013:2,4) pointed out that more or less 10% of the population has HIV, with the disease most prevalent amongst people in the 15-49 year age group. Death from HIV occurs on average around 10 years after infection and South Africa still has the largest number of AIDS-related deaths in the world. Malan (2014) states that South Africa is the country with the highest HIV incidence; the improved antiretroviral treatment programme results in people with HIV living longer, hence the higher number of HIV positive people in society. The South African National AIDS Council (n.d.) illustrates that death amongst infants and children has rapidly decreased due to successful prevention of mother-to-child transmission. However, perhaps the most impactful consequence of HIV prevalence is that more than 150 000 children are living in child households, having lost one or both parents to the disease.

Violent crime: Lancaster (2013) writes: "Whilst murder is often used as a main indicator to support arguments that South Africa is a violent country, it only makes up only 2.5% of all violent crime. When violent crime hotspots are analyzed, central business districts remain the most high-risk areas in terms of violence in general, and specifically for robberies". However the Institute for Security Studies (n.d.) states that crime statistics for 2012/13 indicate an increase in murders (South Africa's murder rate is about four-and-a-half times higher than the global average) and attempted murders, and present the opinion that, internationally, murder is seen to represent a country's stability and has a monumental impact in the perceived reputation of a country. The Institute explains that policing is in and of itself not going to reduce these statistics, because by far the overwhelming majority of murders, attempted murders and rapes tend to be a consequence of social and economic factors as they are committed by people who know each other and hence are referred to as 'inter-personal violent' crime.

Service delivery: In order to redress a lack of housing, water and sanitation associated with Apartheid that effected the majority of South Africans, the post-Apartheid government declared these three factors fundamental human rights. According to Statistics South Africa (2014), in 2013 86.4% of households had access to piped water; electricity supply from mains was at 85.4% and sanitation was improved to77.9%. However, during Apartheid non-payment for services was associated with part of the struggle for democracy; this legacy has been carried over, with violent demonstrations of communities being dissatisfied with the quality of services rendered and therefore refusing to pay for such services. This has a knock-on effect, in that communities don't pay their municipalities, so the municipalities in turn are then not able to pay for electricity, refuse removal, water etc.

Business conditions

Economic recession: South Africa's banking system is globally competitive and the regulatory requirements pertaining to it has helped prevent the need for any banks to be bailed out by government (MarketLine, 2013:2). Micro-lending has always been a part of the country's economic landscape, but there is an increasing concern about the upsurge in unsecured lending. The reasons for this are three-fold: 1.) South Africa is an aspirational society, so often it is necessary to fall back on credit in order to purchase that which is desired versus that which is needed. In this regard Moorad (2013), refers to research that indicates that South Africans spend "…four times as much on alcohol than on out-of-pocket healthcare and one-and-a-half times more on clothing than on education". 2.) Similarly, inflation is increasing, particularly because of energy costs sky-rocketing and higher food prices (MarketLine, 2013:22). Both the International Monetary Fund (IMF) and South Africa's Reserve Bank revised their economic growth forecast for the rest of the year to 1.7%, which is the IMF's third downgrade in less than a year and is of concern as the country needs a growth rate of more than 5% a year. This can only be achieved if it is made easier to establish entrepreneurial enterprises, labour laws are relooked and more investor-friendly legislation is put in place (Maswanganyi, 2014). For example, there has been speculation that following the heavy consequences of recent strikes, the government has spoken about possibly stipulating a limitation on the length that a strike will be allowed to play out.   3.) Rising interest rates, as evidenced by the food price barometer, indicated that an identical food basket this year is 11% more expensive than the previous year. Also, the Pietermaritzburg Agency for Community Social Action illustrates that three staple foods for the majority of South Africans rose by a combined average of almost 22% over a year   (Maswanganyi, 2014). This resultant increase in public debt is dangerous, as it may exceed the 40% of GDP that the IMF recommends for developing countries (MarketLine, 2013:27).

Investor confidence: There has been a decline in investor confidence, coupled with rating agencies such as Moody negatively altering their rating for three main reasons:

Labour unrest: Recent labour unrest has been characterized by an unprecedented level of violence (including leading to loss of lives) and lengthy wage disputes, often demanding wage increases that far exceed inflation. The unions put forward that they are trying to ensure a living wage, while the companies embroiled in this unrest say that they cannot afford the increased wage demands and warn that if they were forced to comply with union wage increase demands, they would have no alternative than to lay off workers. The platinum mines experienced a 5 month wage strike that cost the country more than R13bn. (Seccombe, 2014) informs that currently close to a quarter of a million union members of the National Union of Metalworkers of South Africa

(Numsa), the largest union in the country, has been on strike for over a month now; it should be borne in mind that the platinum strike that preceded it, was primarily responsible for the shrinkage in the economy in the first quarter following that strike. The government finds itself in a difficult position to counter what has been termed 'strike season', as it is in a tripartite alliance with The Congress of South African Trade Unions and the South African Communist Party who both claim to represent the interest of the worker.

Electricity supply: Electricity is supplied by state-owned Eskom (there are no competitors), who is not able to meet the demand for electricity, primarily because coal-fired plants are the primary source of electricity and many of these power stations have not been upgraded, resulting in electricity cut-offs. Electricity has also become expensive, though government tries to find ways to fund the necessary running repairs and build new plants (MarketLine, 2013:28). In addition, a further problem pertaining to electricity is electricity theft – people illegally tap into the electricity grid. In an effort to bring an end to this, pre-paid meters are being installed when constructing new homes. The obvious implication is that an economy needs electricity to function.
Declining Rand: Labour unrest, impacting on political instability, increases the downgrade in credit ratings and the trade deficit. Such volatility in the currency will have a negative effect on inflation, which is rising. Since 2013 the Rand has depreciated by about 10% to the Dollar (MarketLine, 2013:3). At the time of writing, the ZAR/EUR is 14.12, ZAR/GBP is 17.84 and ZAR/USD is 10.51.

Growing middle class: The middle class is increasingly multi-racial, with Black incomes increasing faster than White incomes (Yellowwood, 2014:7). Many of the Black middle class members are first generation. It is important to recognize a homogenized segment with two important characteristics (Yellowwood, 2014:7): 1.) They feel a heavy responsibility to support others in their family financially. 2.) They are anxious not to lose what comes with middle-class lifestyle. Given the latter two sentiments, they will often be hybrid consumers prepared to buy less expensive items in order to buy some more expensive ones (for example, buying a cheap shirt in order to afford expensive shoes) (Yellowwood, 2014:15). A further advantage of a growing middle class is that it broadens the tax base which, in the past, has relied heavily on taxing the few in order to help create revenue to help the few.

Informal economy: South Africa's economy is a hybrid economy that integrates the formal and informal. A typical example of work conducted in the informal sector is the street trader, who might sell fruit/vegetables, sweets or food, and are often found around construction sites or near bus stops. The informal sector is playing an increasingly important role because of unemployment, which remains a serious concern. The South African Networking Practitioners Developing Local Economies (n.d.) suggests that if it was not for the informal economy, the unemployment rate would be around 47.5% in comparison to the current 25%. Moreover, The World Bank (n.d.) specifies that 52% unemployment as a percentage of the total labour force occurs between the ages of 15 to 24 years. The informal sector receives deliveries, promotional material, signboards, discount prices and credit from the formal sector, illustrating that it is not the formal versus the informal sector, according to the Bureau of Market Research (2004).

Small business: Again, given the high levels of unemployment coupled with other economic ailments, the government has recognized the need to grow small businesses. Incubation Support programmes have already been initiated, creating partnerships between government and the private sector in order to support small business. A memorandum of understanding was signed between the United Nations Development Programme and the local Department of Trade and Industry,that will have as its outcome the further development of business incubators aimed

specifically at small business enterprises (MarketLine, 2013:4). To demonstrate the government's acknowledgement of the important role of small business, the President appointed a Minister of Small Business and Development, a Cabinet position that did not exist before the May 2014 national election.

Tourism: One sector that is showing growth is tourism. By 2012, South Africa was already receiving over 9 million visitors and in the same year total foreign direct spending related to tourism was $75.49 billion. The financial significance of tourism can be seen in the equation that for every 16 visitors, one job is created (MarketLine, 2013:21). This is a crucial area of increasing employment opportunities; for example, the number of tourists from China alone increased by almost 60% from 2011 to 2012 (The South African Tourism Annual Report, 2012/13:43). South Africa has also shown that it is able to successfully host mega sporting events such as the Rugby World Cup 1996, FIFA World Cup 2010, Africa Cup of Nations 2013. The South African Tourism Annual Report (2012/13:24) indicates that South African Tourism was able to elicit more than R4.5 billion editorial coverage.

Infrastructure: The central importance of infrastructure to enable the economy to function optimally is recognized by the government. It has earmarked $20.74 billion over a three-year period, starting 2013-2014, to improve existing infrastructure and develop new efficient infrastructure with the money to be spent on roads, railways, ports and electricity plants (MarketLine, 2013:25).

Africa: Afro-pessimism that saw Africa as the 'Dark continent', with all the negative associations ascribed to it, has now been replaced with Afro-optimism: Amidst a global slowdown, Africa is enjoying accelerated growth. The Africa Competitiveness Report 2013 refers to it as an "African economic renaissance", but warns that for this to be sustainable, there needs to be – inter alia – a trickle-down effect that will improve living standards. The quality of infra-structure will need to be improved, job creation will need to keep up with a population that has hit 1 billion. Deepening into-Africa trade will be required, as well as the improving of standards of education. It is important to note that Nigeria has replaced South Africa as Africa's strongest economy.

Legislative practice

South Africa is a constitutional democracy with an independent judicial system and a very active Constitutional Court. This means that citizens can – and do – take the government to court. For example, Basic Education For All, supported by Section27, a civil rights group, took the Basic Education Department to court, because not all pupils in one of the provinces had received their textbooks on time. The High Court ruled against the Department, citing that the right to education had been violated (News24, 2014). However, a valid criticism is that the legal process is slow. No one is exempt from the law, with charges even being laid against President Zuma, in certain instances. Central to the judicial system is the National Prosecuting Authority of South Africa (n.d.), whose core function is to serve as public prosecutors, but they believe that they also have a responsibility to:

- o Contribute to the South African economy
- o Contribute to freedom from crime
- o Contribute to social development
- o Foster civic morality
- o Reduce crime
- o Raise public confidence in the Criminal Justice System.

Legislative framework for PR Education and Training

There are two major pieces of legislation that impact education generally and PR education specifically in South Africa:

The NQF Act 67 of 2008, which replaced the South African Qualifications Authority (SAQA) Act 58 of 1995, focuses on the national qualifications framework and quality councils. 2
The NQF is a framework on which standards and qualifications, agreed to by education and training stakeholders throughout the country, are registered. It came into being through the South African Qualifications Authority Act 58 of 1995 (*Government Gazette* No. 1521, 4 October 1995), which provides for "the development and implementation of a National Qualifications Framework". The SAQA Act was subsequently replaced by the NQF Act 67 of 2008.

It is important to note that the NQF Act affects not only people working in education, but also in employment. In other words, the processes, structures and regulations around learning and qualifications which are contained in the NQF, have a direct impact on how education and training should happen for Public Relations.9In the same way, the Skills Development Act (SDA) has to be read carefully, and interpreted in conjunction with the NQF Act.

There are other pieces of legislation that are also relevant, such as the Employment Equity Act.

Priorities for Public Relations training and education

Public relations courses and qualifications are managed by the objectives of the NQF, which ensures that nationally adhered-to standards are achieved and that standards are also internationally benchmarked.

The NQF objectives are as follows:
- o To create an integrated national framework for learning achievements
- o To facilitate access to and mobility and progression within education, training and career paths
- o To enhance the quality of education and training
- o To accelerate the redress of past unfair discrimination in education, training and employment opportunities and thereby contribute to the full personal development of learners and the social and economic development of the nation at large.

In order to meet these objectives, the legislation retained the South African Qualifications Authority (SAQA). SAQA has the following main functions:
- o To oversee the further development of the National Qualifications Framework (NQF) and advance the objectives of the NQF
- o To coordinate the sub-frameworks of the NQF
- o To monitor the Sector Education and Training Authorities (SETAs), the bodies across industry that must make all this happen.

QA
According to the National Qualifications Framework Act, "the NQF is a comprehensive system for the classification, registration, publication and articulation of quality assured national qualifications in South Africa" (*Government Gazette* No. 30778 of 2 February 2008).

Framework levels for Education in PR and Communication

According to the NQF Act, there are various levels of learning achievement.
The NQF is organised as a series of levels of learning achievement, arranged in ascending order from one to ten.
- o Each level on the NQF is described by a statement of learning achievement known as a level descriptor.
- o A level descriptor provides a broad indication of learning achievements or outcomes that are appropriate to a qualification at that level.
- o There is one set of level descriptors for each level of the NQF.

The new NQF is structured with the following three distinct sub-frameworks:
- o The General and Further Education and Training Sub-framework. This includes formal education institutions (schools, adult education centres and FET colleges).
- o Higher Education and Training Sub-framework. This includes universities and Universities of Technology.
- o Trades and Occupation Sector Sub-framework. This comprises education and training for the workplace.

The Minister of Higher Education and Training has executive responsibility for the NQF, South African Qualifications Authority (SAQA) and the Quality Council (QC) for General Education and Training and the QC for Higher Education. The Minister of Labour has executive responsibility for the Quality Council for Trades and Occupations established by the Skills Development Act.

Skills Development Act

The SDA Act 97 of 1998, as amended, focuses on training practices and institutions to assist with this process. This Act is supported by *The Skills Development Levies Act 9 of 1999* (Abbreviation: SDLA), which prescribes a levy payment to fund skills development in South Africa.

The objectives of the SDA are:
- o To develop the skills of the South African work force
- o To increase the levels of investment in education and training in the labour market and to improve the return on that investment
- o To encourage employers to improve the employment prospects of persons previously disadvantaged by unfair discrimination, and to redress those disadvantages through training and education.

The vehicles for this development is:
- o The National Skills Authority (NSA)
- o The Sector Education and Training Authorities (SETAs), the bodies across industry that must make all this happen

Act
According to Bitzer (2012:12), since 1994 in the history of South African higher education, specific areas of higher education have received much attention from academics and scholars in South Africa, such as the reconstruction of policy development by the National Commission on Higher

Education (NHCE), whose role was to assist in the development of a policy framework for the transformation of South Africa's higher education sector comprising universities, technikons, nursing, agriculture and teachers' training colleges:

The factors that influence PR education in South Africa include the following:

- o An expansion of student enrolment and broadened access to reach a wider distribution of social groups and classes, including adult learners for public relations
- o Greater responsiveness to societal needs and interests of public relations
- o Increased cooperation and partnerships in structures of governance, both at the system and institutional levels
- o A higher education system for PR designed, planned, managed and funded as a single coordinated system comprising universities, technikons and colleges
- o Alignment of PR qualifications with the national Qualifications framework allowing adequate channels, flexible entry, as well as exit points and horizontal and vertical mobility
- o A strategic public funding framework taking into account the number of students in different fields of PR and levels of study; and addressing the special needs of institutions such as equity, redress and research infrastructure
- o Establishment of a higher education quality committee responsible for PR programme accreditation, institutional auditing and quality promotion
- o Distance education and resource based learning for PR

The legislation relates to the National Qualifications Framework (NQF), to the South African Qualifications Authority (SAQA) and to Skills Development, which have an impact on PR education in South Africa.

Protection of Personal Information Act (Number 4, 2013)

POPI protects personal information by restricting how it may be collected and used. Direct marketers will be most affected by this legislation, but it will also impact on PR and Communication practitioners, because the processing of personal information is now deemed illegal unless the company has gained the requisite consent from the person involved. As a consequence platforms such as e-mail and database marketing will be heavily influenced by POPI. Aligning with POPI in the correct way implies that marketing and communication campaigns may not use spam.

Technological developments

- o The Information and Communications technology (ICT) industry contributes almost 7% to the GDP (Government Communications, n.d.).
- o The government has formulated a three-pronged approach to enable the country to compete in an advanced knowledge economy (Government Communications, n.d.):

1. A national integrated ICT policy where, for example, in rural areas where there is poor mobile coverage, attempts are going to be made to utilize unused television frequencies – with the aid of Google and Microsoft (MarketLine, 2013:35).

2. Rolling out a national broadband network. This is essential, given that in 2012 only 2% of the population were able to access broadband at home. In addition, broadband is very expensive – the average price of broadband is $11.53 per Mbps whereas the world average is $1.72 per Mbps (MarketLine, 2013:34). Mudzuli (2013) highlights the example of Tshwane, a metropolitan
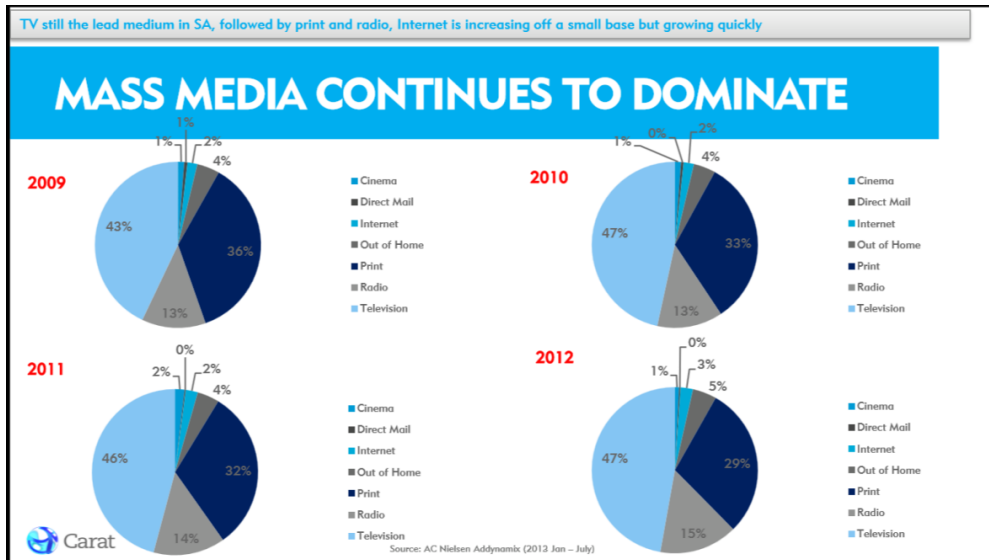
municipality that offers free internet connection via zones to residents, with the Tshwane group information officer stating that "the internet should now be classified as a basic service such as electricity and water, and no longer a luxury." Government is spending money on submarine cable systems – South Africa is already connected to 5 of them. Moreover, Yellowwood (2014:18) takes note of how digital and social platforms are increasingly being accessed, with almost 10 million active Facebook users per month, of which 87% use their mobile phones to do so and 5.5 million Twitter users who also connect, 85% of them via mobile phones. Open-sourcing is also readily used by organizations.

- o A digital broadcasting migration policy, which will see the government switching over to digital television and has the objective of reaching 11 million homes in this manner by 2016 (MarketLine, 2013:35).
- o Network Readiness Index: The World Economic Forum's Global Information Technology report (2014) indicates that the Index measures on a scale from 1 (being the lowest) to 7 (being the highest) how 148 economies leverage information and communication technologies as a means of competitiveness. South Africa ranked 70th, with a score of 3.98. A possible reason for such a score is that insufficient money is being invested by the Science and Technology Department, hence there is low innovation in this field. The Department has indicated that it will be spending 2% of the GDP on R&D by 2018 (MarketLine, 2013:33).
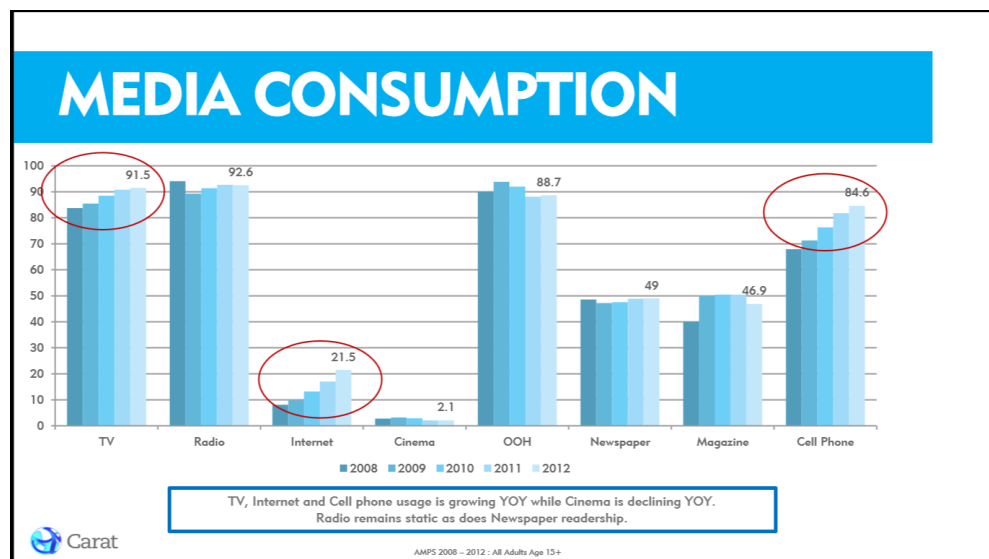
Media

Press Freedom

The index of press freedom ranked South Africa 52nd (Reid, 2014) out of 179 countries. The 10 point fall indicates that South Africa is no longer among the top 50 states in terms of press freedom (Reporters Without Borders, 2014). This is largely due to the proposed introduction of the Protection of State Information Bill by the ANC government. The Right2Know Campaign was launched in 2010 in opposition to the bill by concerned citizens and organisations alike. The Right2Know activists argue that freedom of expression and access to information is foundational for a thriving democracy (Right2Know, 2014). Although South Africa currently enjoys a respectable level of press freedom; critics of the secrecy bill fear that the government could use it to hide corruption, target whistle-blowers and negatively influence the public's access to information by curtailing investigative journalism. Proponents of the bill argue that there is a need for a statutory regulatory mechanism (Reid, 2014) that will create a means of protecting sensitive state information and prosecuting persons that unduly use such information against the republic and its citizens.

TV still the lead medium in SA, followed by print and radio, Internet is increasing off a small base but growing quickly

MASS MEDIA CONTINUES TO DOMINATE

Source: AC Nielsen Addynamix (2013 Jan – July)

The AMPS 2008 to 2012 trend data reveals the dominance of mass mediums on the South African media landscape (please refer to Figure 1 and Figure 2). Although internet consumption was not as high as the values recorded for Television, it has shown remarkable growth over the last five years and is set to continue its upward trajectory. Cinema, however, has seen a steady decline due to a combination of consumer belt-tightening post the 2008 recession, the advent of pirated or 'downloaded' content and a mass market (Lower LSMs) that has not grown up going to the cinema. An exposition of the media landscape is important to contextualise these realities.

MEDIA CONSUMPTION

TV, Internet and Cell phone usage is growing YOY while Cinema is declining YOY. Radio remains static as does Newspaper readership.

AMPS 2008 – 2012 : All Adults Age 15+

Television

A combination of increased access to electricity, improving living standards for many South Africans, and access to credit have contributed to the growth of new markets and revenues for providers that offer relevant content. The South African television sector, estimated to be worth R30 billion (The Annual 2013/14:23), has grown from 7 channels in 1991 to over 180 presently. This changed media landscape is largely due to the emergence of subscription television.

Subscription Television Channels

The Independent Communications Authority of South Africa (ICASA) provisionally awarded five new licences to Pay-Television providers (McLeod, 2014) in the first quarter of 2014 in an effort to break the domination of MultiChoice in the subscription television landscape. The MultiChoice South Africa group includes a digital satellite Pay-Television provider called "DSTV", which has been in operation since 1995 (MultiChoice, 2014a). MultiChoice South Africa presently has 8 bouquets reaching 28.3% of the South African subscribers and since 2009, the platform has grown by 44.4% (The Annual, 2013/14:22). DSTV currently has 130 video channels, 32 radio channels, 40 CD quality audio channels and 3 interactive services (MultiChoice, 2014b). DSTV also offers a variety of On Demand alternatives to its premium subscriber base. TopTV, a much smaller player in the pay television arena, attracted approximately 200 000 subscribers (The Annual, 2013/14:22), but failed to consolidate its position because of the introduction of value bouquets from DSTV and a debt of R750 million. It has since been closed down and rebranded into StarSat on 31 October 2013 (StartSat, 2014). Offering 100 plus channels, starting from R99 and backed by On Digital Media (ODM), only time will tell if the markets take to this new offering.
Nonetheless, the broadcasting landscape is set to be radically altered by the migration from analogue to digital terrestrial Television (DTT). The migration has and will open broader opportunities for mobile television, video-on-demand delivery platforms, internet television and digital convergence (Aldridge, 2014). Sentech provides signal distribution services for most of South Africa's broadcasters and anticipates that it will have converted enough of its transmitters by 2015 to cover South Africa and meet the 2015 analogue switch-off date (Nevill, 2013). The increased spectrum offered by the Broadcasting Digital Migration (BTM) has prompted the launch of 24-hour news channels that cater to a South African and Pan African audience, namely SABC News, eNCA and ANN7.

Free to Air Channels

The South African Broadcasting Corporation (SABC), which was originally a state broadcaster under the apartheid regime, has been repositioned as a public broadcaster with a mandate to educate, inform and entertain South Africans and audiences beyond its borders. The SABC TV channels dominate the South African media landscape with SABC 1, SABC 2 and SABC 3 having a combined audience of 30,248,000 million weekly, representing approximately 87% of a potential Adult audience watching (SABC, 2014). However, the public broadcaster has been accused of political censorship and being a mouthpiece for the ANC government. eTV, a 16-year old digital free to air station, has positioned itself as the champion of free speech and has gained traction through its news bulletins and local and international content. In 2013, the channel launched a multichannel offering that can be accessed via a satellite receiver and a once-off payment. This multi-channel offering includes on-demand content and other digitally-based interactive features. Alternatively, South African community stations did not show as much growth as their subscription counterparts; however, they have an opportunity to provide localised and relevant content to a market that is looking for engaging content and more choice.

Community Stations

South African Community Stations have a footprint in Gauteng, the Eastern Cape and Mpumalanga. In 2013, they formed an association to resist government plans to dictate the governance of community stations (Aldridge, 2014). Proposals included turning provincial stations

into state-funded and -administered entities and the awarding of limited licences. The Association of Community Television South Africa (ACT-SA) represents 9 community television licensees, namely 1KZN TV, Bara TV, Bay TV, Cape Town TV, Fresh TV, North West TV, Soweto TV, TBN and Tshwane TV (Bizcommunity, 2013, Aldridge, 2014). Community television represents a combined audience of 16 Million, 7 million of which can be attributed to Soweto TV (Aldridge, 2014). Thus community television is becoming an important conduit of community narratives in South Africa and beyond.

Radio

South Africa currently has 9 commercial African Language Stations (ALS), 21 commercial regional stations and 6 commercial national stations (RAMS, 2014/2). The National Community Radio Forum (NCRF) has about 120 members, with about 75 of its stations on air and others waiting to be licensed by ICASA (National Community Radio Forum, 2014). Between 2004 and 2014, listenership levels have almost doubled from 5 million listeners to 9,6 million. On the whole, radio enjoys a large following and it is estimated that radio will generate R4,2 billion in revenue in 2014 (PWC South African Entertainment and Media Outlook Forecasts, 2013). As is the case with television, SABC Radio dominates, with its radio stations commanding 25,486,000 million listeners weekly in South Africa (SABC, 2014). In fact, the second largest radio station in the world, Ukhozi FM with 7,623 million listeners, is in the public broadcaster's stable (Lord, 2014). According to the Radio Audience Measurement Survey (RAMS) for June 2014, which quotes figures for adults (aged 15years and above) nationally, listening levels are stable in comparison with previous surveys. The average South African listens to two radio stations per week at home (93%) for three and a half hours (Bizcommunity, 2014; RAMS, 2014/2). Thus station loyalty is relatively high, because South Africans form strong bonds with their favourite radio stations. Lastly, a shift is taking place in the way stakeholders listen to radio, with a rise in the use of cellular phones (The Annual, 2013/14:24).
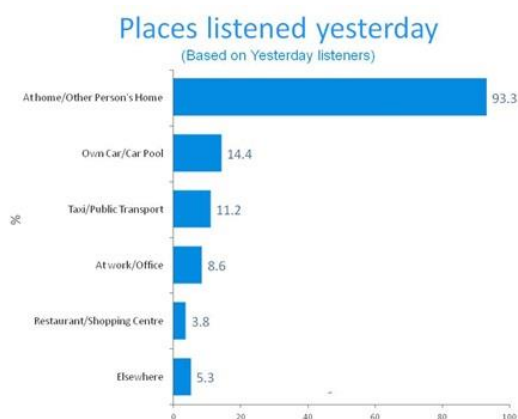
Source (RAMS 2014/2).
For more information please visit
www.saarf.co.za and www.rab.co.za [Radio Advertising Bureau of South Africa]

Print

There are presently 413 newspaper titles, comprising 26 dailies, 29 weeklies and 358 community newspapers. The Daily Sun is the most widely read paper in South Africa, catering to a Black

African, lower Living Standards Measure (LSM) reader. This reflects a trend of circulation decline in mature markets and growth in emerging markets (Grabe, 2013:50). According to the "Majority Report" prepared by the UCT Unilever Institute of Strategic Marketing, this emerging market represents 70% of South Africa's 53 million population and is said to have a market value of R220 billion. This market value is largely funded by the ANC government's monthly social grants for disadvantaged children, the disabled and the elderly, with remittances and other funding accounting for its remainder (UCT Unilever Strategic Marketing Institute, 2014).

Arguably, digital has left an indelible mark on print media in South Africa. Retrenchment and restructuring is taking place on a wide scale in newsrooms due to rapidly changing business models, stakeholder consumption patterns and compressed time frames. Consumers are increasingly turning to their social networks and other digital media to access information. The titles that failed to adapt and grapple with the monetisation of their digital collateral closed down to give way to leaner newsrooms and editorial teams. Even though many titles are discontinuing, circulation for consumer titles in 2013 was up by 6% (Grabe, 2013:56). Newspapers and magazines, to a lesser extent, continue to play a strategic role in the South Narrative. As such, declining circulation has been discussed at parliamentary level and continues to be of concern to academics alike because of its strategic influence (Neville, 2013:21). Perhaps more importantly, stakeholders are demanding a more collaborative business model with citizen journalism taking root; consequently in more mature markets the role of the journalist is being redefined as that of an analyst who makes sense of the news, versus getting the scoop. Within the space of the emerging market and black middle class (also known as the Black Diamond), print is a source of information for entertainment and education. Titles enjoy high pass-on rates amongst these stakeholders.

Digital

The report on the Transformation of Print and Digital Media (PDMTTT) forecasts that the number of internet users will reach 29,8 million by 2016 (Neville, 2013:22). In fact, "digital's share of consumer spending (excluding internet access) in South Africa is set to grow from 1% in 2008 to 4% by 2017" (PWC, 2013:22). The mobile device has been described as Africa's computer and is creating access in rural and urban areas, leading to potentially great societal change (Neville, 2013:21). With roughly 2.4 phones per household, there is a 97% penetration rate of the mobile device (Bizcommunity, 2014), clearly demonstrating the importance of mobile phones as a touch point for Communicators. Additionally, this is the means through which most South Africans access the internet. However, until data costs come down significantly, the full potential of the internet will continue to be out reach for most South Africans. Out of a potential 37,2 million mobile phone users (aged 15 and above), only 17,7 million users can afford the mobile web (Bizcommunity, 2014), therefore strategic communication initiatives for the more affluent stakeholder rely on media-rich applications and the less affluent on campaigns related to voice, SMS and MMS.

The South Africa Social Media Landscape 2014 research study, released in October by World Wide Worx and Fuseware, reveals that Mxit, a locally founded social networking application has 7,2 million users down from 9,5 million (The Media Report, 2013:26). South Africa has 9, 6 million Facebook users of which 7,6 are above the age of 21 (Meier, 2013:5). In terms of other Social Media statistics, Twitter has 5,5 million users, generating 50 million tweets per month, 4,7 million YouTube users and 2,7 million LinkedIn users (Meier, 2013:10, 30).

Out of Home (OOH)

OOH may not enjoy the same spend as radio, television and print, but it has the potential to grow in revenue and influence (see Figure 1) mainly because of the reliability of metrics. Efforts are currently under way to provide organisations with more accurate and reliable statistics, particularly for traditional or non-digital assets. Critics believe that the industry association (OHMSA) needs to be as proactive like its UK and US counterparts, moving away from a billboard focus to embrace digital (the Media, 2013:71). Obviously, digital networks will increase the capabilities of the OOH industry and offer more targeted, measurable and interactive touch points for organisations to communicate with their stakeholders.

Transit media, in particular minibus taxis, are the most viewed OOH touch point with 77% reach of all adults in a week (The Annual, 2013/14:28). This is mainly due to the fact that minibus taxis transport over 15 million commuters seven days a week for an average of 45 minutes (Oxford, 2013). Plans are afoot to roll out free Wi-Fi on 3G and LTE (4G) platforms over a three-year period for all taxis (eNCA, 2014), with the first phase already done. Clearly, there will be numerous opportunities to get direct access to these stakeholders and create an entirely new value add in the communications arsenal. The Free Wi-Fi initiative is an example of the South African OOH industry's ability to provide relevant solutions for South African consumers and brands alike. Other examples include innovative ambient executions that are driving engagement and changing the way organisations are connecting with the emerging and young stakeholders.

Stakeholders

The concern of organisations for the wide range of stakeholders and environment, as a reflection of the move from narrow responsibilities of organisations to broader, has been institutionalised through the King III Report. King III identifies several principles governing stakeholder relations, such as the broad responsibility to proactively deal with stakeholder relations, a balanced approach to stakeholder interests, the equitable treatment of shareholders, transparent and effective communication with stakeholders and effective, efficient and expeditious dispute resolution (IOD 2009). There is additional legislation governing specific areas of stakeholder relations such as labour and consumer legislation, but the challenges of stakeholder relations for organisations go beyond the compliance with legislation. There is a growing recognition that communication can create value for an organisation through the co-creation process, where a long-term organisational value is created through interdependent inputs from the employees, consumers and investors (De Beer 2014) and other stakeholders. The negotiation of organisation-stakeholder relationships on the basis of series of social contracts, networks and co-creation of value is proposed by De Beer and Rensburg (2011).

Consumers

Business is moving away from a transactional view based on the relationships between the individual consumer and the firm, also focusing on contributions of networks and other forms of collaboration with stakeholders in creating a brand value (De Beer 2014). South African companies are well positioned to move the value creation to the next level. South Africa has a good IT infrastructure and large number of South African consumers have access to mobile and internet technology. Although consumer protection is not as well developed as in Europe, South Africa made a first significant step in that direction with the introduction of a Consumer Protection Act, which came into force in 2011. The Protection of Personal Information Act also has an impact on

consumer rights, in that it guides, among other aspects, the direct marketing and electronic communication. There are also variety of organisations that act in aid of consumers, such as the National Consumer Commission, National Consumer Forum, Provincial Consumer Affairs Offices and South African National Consumer Union. These non-profit organisations focus on consumer education and protecting consumer rights. There are also spontaneous consumer movements directed at solving issues. For example, a civil action group Opposition to Urban Tolling (OUTA) began in 2012 to challenge the government plans to charge e-tolls on a freeways in the Gauteng province. The movement has wide-spread support from concerned businesses and individuals and was successful in postponing the e-tolling project. Although the government implemented e-tolling in 2013, the premier of Gauteng announced in 2014 an intention to review the e-tolling system as a result of negative public opinion.

Communities

De Beer and Rensburg (2011) argue that social responsibility driven self-regulation is influenced by stakeholder demands in particular investor and consumer demands. In the South African context the demands of the communities in which organisations operate should be also considered by organisations. Communicating the Corporate Social Responsibilities (CSR) activities is not easy for organisations, as CSR goes beyond what corporations are comfortable to communicate about (Schmeltz, 2014). Likewise, engagement in community relations is quite a challenge for many corporations. Specifically the incorporation of CSR into organisational strategy, the corporate value system and corporate identity is challenging for many corporations and CSR activities are treated as peripheral to corporate strategy. In addition, Angelopulous et al. (2013) reported surprisingly high shareholder – as opposed to stakeholder – orientation among South African managers, given the amount of attention paid to CSR in business and legislation, which may be a sign of "CSR fatigue" among South African managers.

The literature suggests that CSR can improve organisational reputation and corporate brand reputation. However, research by Moloi et al. (2014) suggests that in the perception of the communities, CSI programmes are not directly linked to brand image and the reputation of the organisation. Often, poor communities which struggle to satisfy their basic needs, have high expectations of big business helping them and are quite distrustful of motives behind the community project. Communities perceive CSI initiatives, even if they directly benefit from them, as separate from the brands. Another factor contributing to the lack of trust is that the organisations are not always directly involved in the projects, but rather use intermediaries and government agencies as project administrators.

Employees

South Africa has extensive legislation governing employment relations in the country, such as the Labour Relations Act, the Basic Conditions of Employment Act, the Employment Equity Act and Skills Development Act. However, organisation-employee relations extend far beyond legislation. Among many concerns of employee stakeholders are high unemployment, the changing role of the unions, tackling HIV infections among the workforce, workplace safety, especially in the mining industry, B-BBEE implementation and the use and the role of labour brokers in the labour landscape in South Africa.

Activists/civil society

South African has a vibrant civil society. There are nearly 125 000 non-profit organisations (NPOs) registered in South Africa (www.npo.gov.za), ranging from education providers to community development organisations, professional associations, religious organisations, sport and social clubs, charities, trusts and foundations among many others. Grass-roots activism in South Africa has different manifestations. Citizen protests in townships against the lack of basic services delivery by the local government are a common feature in South Africa. These protests are usually violent and lead to the destruction of property, sometimes even the loss of life. The protests are an indication of not only the lack of capacity to improve the lives of citizens, but also testimony to the fact that the local government is not able to engage in dialogue with the stakeholders and harness citizen participation. Research by Rhodes University (Grant, 2014) conducted in seven municipalities in the country, revealed that unions, community and special interest groups are the top three protesters groups that submitted the most protest notices to the local authorities. The main reason for the protests is linked to the crime and justice system – protesters often protest against crime in general, but also against the granting of bail to suspected perpetrators of crime. The next most common reason for protests are labour-related issues, followed by service delivery protests. There were more than 500 service delivery protests in the country between 2010 and 2012 and around 80% of these protests were violent in nature (De Visser & Powell 2012). Poor communication and public consultation exacerbate service delivery protests.

A number of examples of successful activism can be provided. The Treatment Action Campaign, founded in 1998, advocates increased access to care and treatment for people living with Aids and HIV. Today the organisation has more than 16000 members, whose actions significantly influenced government policy on HIV, including mother-to-child infection transmission prevention and antiretroviral treatment programmes. Civil rights groups Basic Education for All (BEFA) and the public interest law centre – Section27 – continue to put pressure on the Basic education Department to provide adequate education to the most disadvantaged learners. In recent developments, they successfully took the Department to court over the violation of pupils' rights by not having delivered the school books to schools in the Limpopo province.

Context for the Profession

Culture

South Africa is one of the most multicultural countries in the world and is therefore frequently referred to as "the rainbow nation". The country has been a constitutional democracy since 1994 and the 1996 Constitution Act of the Republic of South Africa is the outcome of a long, inclusive negotiation process that was carried out with full awareness of the injustices of the country's non-democratic past (Skinner & Benecke, 2014). At present, South Africa is regarded as having one of the most progressive constitutions in the world (O'Connor & Falconi, 2005:43). Dawkins and Ngunjiri (2008:290) remark that "because the cultural differences between South Africa and the developed countries are relatively small, there is greater opportunity to also observe how institutional and strategic considerations" influence corporate social responsibility in an emerging market economy.

Because of the diversity and multicultural composition of the South African population, it is impossible to describe the culture in terms of Hofstede's cultural dimensions, for example, as evident in the description of the population below. With the emphasis on "equality" within the South African constitution, power distance, for example, should not feature, although in reality many traditional hierarchies still exist. Sriramesh and Verčič (2012), recognising the limitations of Hofstede's dimensions, show that Lewis's continuum places countries differently, based on three dimensions: linear-active (cool, factual, decisive planners), multi-active (warm, emotional, loquacious, impulsive), and reactive (courteous, amiable, accommodating, compromisers, good listeners). Several studies have been conducted over the past decades from within fields such as Anthropology and History, for example, that offer rich descriptions of specific African cultures (see, for example, Becker (2012) and Kotzé, Els and Rajuili-Masilo (2012)).
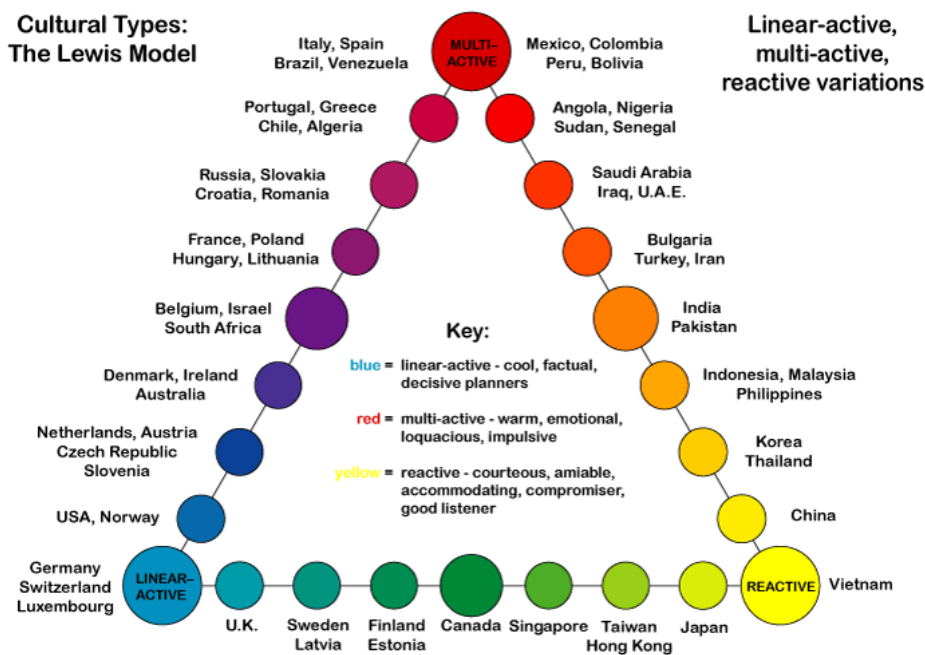

Figure 3: Cultural types: The Lewis Model (in Sriramesh and Verčič, 2012:14)

Sriramesh and Verčič (2012:15) explicate that there is a strong relationship between culture and public relations. That is evident from the complex ways in which culture becomes the "environment" in which public relations is practiced, impacting deeply on such practice. It is therefore imperative for future studies in public relations in South Africa to explore how the many different cultures impact on the practice of public relations.

The content that follows provides information from public information resources, such as SouthAfrica.info, on the population groups in South Africa, languages, traditions, and public holidays, sport as a cultural phenomenon and consumer archetypes identified in the NOW Study (2007).

Population groups

South Africa is a nation of great diversity with nearly 52-million people and a wide variety of cultures, languages and religious beliefs. Africans are in the majority, making up 79.2% of the total; coloured and white people each make up 8.9% of the total; and the Indian/Asian population 2.5%. "Other" population members make up 0.5% of the total (SouthAfrica.info, 2014). According to the

Census 2011 data from Statistics South Africa, the country's population was 51,3% female and 48,7% male. The traditional African population is made up of four broad groupings:
- o The Nguni, comprising the Zulu, Xhosa, Ndebele and Swazi people
- o The Sotho-Tswana, who include the Southern, Northern and Western Sotho (Tswana) people
- o The Tsonga
- o The Venda

White South Africans include:
- o Afrikaners, descendants of Dutch, German and French Huguenot who came to the country from the 17th century onwards
- o English-speakers, descendants of settlers from British Isles who came to the country from the late 18th century onwards
- o Immigrants and descendants of immigrants from the rest of Europe, including Indian/Asians, Greeks, Portuguese, Eastern European Jews, Hungarians and Germans.

The label "coloured" is contentious, but it is used to refer to people of mixed lineage descended from slaves brought to the country from east and central Africa, the indigenous Khoisan who lived in the Cape at the time, indigenous Africans and whites. The majority speak Afrikaans.

Languages

South Africa is a multilingual country. Its new democratic constitution, which came into effect on 4 February 1997, recognises 11 official languages, to which it guarantees equal status. These are:

Afrikaans	English
isiNdebele	isiXhosa
isiZulu	Sesotho sa Leboa
Sesotho	Setswana
siSwati	Tshivenda
Xitsonga	

Table 4: Official Languages

Besides the official languages, scores of others – African, European, Asian and more – are spoken in South Africa, as the country lies at the crossroads of southern Africa. According to the 2011 census, isiZulu is the most common home language, spoken by just over 20% of the population. It is followed by isiXhosa at 16%, Afrikaans at 13.5% and English and Setswana each at 8.2%. The number of people who speak English as a first language has increased by more than 1-million, to 4.9-million people, or 9.6% of the population. Sepedi is the home language of 9.1% of South Africans, followed by Setswana at 8%, Sesotho at 7.6%, and Xitsonga at 4.5%. Each language group has their own traditions and ceremonies that are often closely tied to or imbedded in religious practices, such as different forms of baptism, wedding ceremonies, initiation, and so forth.

Traditions

The basic unit of South Africa society is the family, which includes the nuclear family and the extended family or tribe. In traditional African society, the tribe is the most important community as it is the equivalent of a nation (kwintessential.co.za, 2014). The tribe provides both emotional and financial security in much the same way as the nuclear family does for white and coloured South

Africans. The coloured and more traditional Afrikaans cultures consider their extended family to be almost as important as their nuclear family, while the English-speaking white community places more emphasis on the nuclear family. Approximately 1-million people have moved to Gauteng in the past decade which highlights the flow of people from rural to urban areas. Even though more people are moving to urban areas, they attempt to maintain family ties, including providing financial support to family members who have remained in the village (kwintessential, 2014). Many rural black communities are still rooted in the traditions of their heritage, whereas the increasingly urban black community combines their roots with urban environment and international influences that surround them.

The Afrikaans culture has always featured strongly in South Africa with an emphasis on culinary delights such as "boerewors", "koeksisters", and "braaivleis". The Afrikaans culture is typically presented as a hospitable, friendly and social culture. Although, as stated earlier, there are many cultural differences, broadly speaking both African and Afrikaans cultures can be described as collectivist and patriarchal. Part of Nelson Mandela's legacy is the philosophy of Ubuntu. While the history of cultural differences among South Africans has prevented the development of social cohesion and the development of shared discourse, Ubuntu has a critical role to play in enabling South Africans to achieve a common understanding that can embrace the constitutional values of non-racialism, non-sexism, non-discrimination, and respect for freedom, human rights and dignity (Letseka, 2012:48). Projects such as the Proudly South African Ubuntu campaign against sexual violence and bullying are implemented in primary and secondary school curricula, for example.

Public Holidays

South Africa has fourteen public holidays that represent the recognition of cultural diversity:

1 January 2014 – New Year's Day	21 March 2014 - Human Rights Day
18 April 2014 – Good Friday	21 April 2014 – Family Day
27 April 2014 - Freedom Day	28 April 2014 - Public Holiday
1 May 2014 - Workers Day	7 May 2014 - Voting Day
16 June 2014 - Youth Day	9 August 2014 - National Women's Day
24 September 2014 – Heritage Day	16 December 2014 - Day of Reconciliation
25 December 2014 - Christmas Day	26 December 2014 - Day Of Goodwill

Table 5: Public Holidays
These public holidays are celebrated in different ways by the various cultures. Although not included as a public holiday, South Africans also celebrate Mandela Day in July each year, to embrace his legacy. On this day individuals and organisations dedicate 67 minutes of their time to represent the 67 years Mandela fought for democracy in South Africa.

Sport as a cultural phenomenon

Sport in South Africa can almost be described as the national religion which transcends race, politics or language. It unites the country in many ways, as evident during the Rugby World Cup hosted by South Africa in 1995. When Nelson Mandela donned the number six shirt of the team's captain, Francois Pienaar, a white Afrikaner, and the two embraced in a spontaneous gesture of

racial reconciliation, the cultures of South Africa were united in this historical moment. The major sports in South Africa are soccer, rugby, and cricket. Although South Africa is by no means the giant of world soccer, for many black South Africans the proudest moment came when it won the African Nations Cup on home turf in 1996. The national team is Bafana Bafana, which means "the boys" and they have been described as extraordinarily erratic, beating giants, then succumbing to minnows (SouthAfrica.Info, 2014). South Africans also participate in other sports such as golf, athletics, and swimming. South Africa is the home of world-class sporting facilities capable of accommodating tens of thousands of spectators in comfort. Sport is often a topic of conversation during social or business meetings and South Africans, in general, are united in their passion for sport.

Idiosyncrasies in South African culture

There are a few idiosyncrasies in the broad South African culture that may be interesting to note, such as car guards, robots, "just-now" or "now-now", and vuvuzelas. In South Africa, with its high unemployment rate, it is typical for individuals, typically identified by a neon reflective vest, to watch over a group of cars to deter thieves and provide peace of mind to the owners of the vehicles, who pay them small change for this service. Traffic lights are often referred to as "robots", which may confuse overseas visitors who are unfamiliar with the use of the term. The terms "just-now" or "now-now" are used as a vague indication of time with no specific duration. There is no specific consensus as to a time frame that may be appropriate for either one, but there is an indication that "now-now" is likely to be sooner than "just-now". Vuvuzelas are crude trumpets or horns that are ubiquitous in sports stadiums across South Africa. People either love or hate them, but they are generally a demonstration of cheer and good spirit surrounding sporting events.

Cultural archetypes in South Africa

A study conducted in South Africa in 2007 by a leading research agency called Synovate, in collaboration with the Consumer Insight Acency (c.i.a.), was marked as a ground-breaking initiative that married qualitative and quantitative research techniques to give South African marketers and, inadvertently, public relations practitioners, a new way to observe and understand consumers and publics (Bizcommunity, 2008).

SA Archetypes model
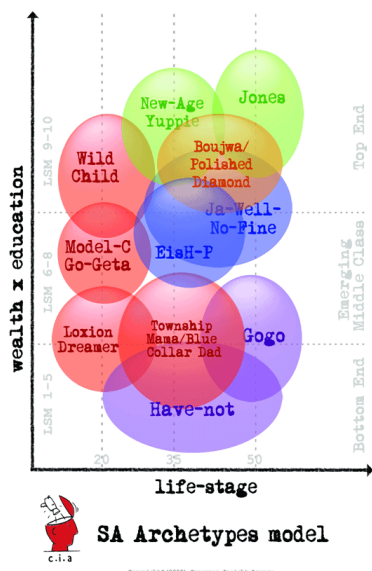Copyright© (2009) Consumer Insight Agency

Figure 6: The life-stage South African Archetype model (Consumer Insight Agency, 2009)
According to Cochrane, one of the directors of the c.i.a., the Archetypes model has revolutionised
how markets are viewed, while challenging conventional segmentation methodology. The outcome
of the project was a series of twelve 35-minute documentary style films that provided an in-depth,
honest understanding of unique individuals connected by a shared mindset. This study
emphasised that there was a need to move beyond race or income as the primary means of
understanding the many different publics in South Africa and to see the bigger picture.

Another study that offered some useful insights into the cultural landscape in South Africa was the
Black Diamond 2 study, conducted by the University of Cape Town (UCT) and Unilever Institute.
The Unilever Institute is a non-profit organisation based at the University of Cape Town, the School
of Management Studies, supported by Unilever South Africa. Its mission is to develop and share
strategic insights to South African markets and offers data bases that may be valuable to public
relations practitioners.

As Steyn (2009:527) concludes, social, political, and ethical issues have gained strategic
importance in an era characterised by the triple bottom line. It is therefore imperative for public
relations practitioners to consider all strategic stakeholders, as well as societal values and norms
when setting strategic directions (Steyn, 2009:518). Some of the biggest challenges facing public
relations at present are the building of trust with all internal and external stakeholders, managing
reputation, and counselling top management on satisfying the societal demands for greater
transparency.

History

Public Relations during the era of Apartheid in South Africa

The public relations profession in South Africa has and will continue to be influenced by the
historical developments in the country. Being transformed from an apartheid rule of racial
segregation to a democratic state where the rights of every South African is protected by the
Constitution provides public relations scholars with a unique context in which to study and practice
public relations. During the earlier years of public relations history, the South African government
was instrumental in establishing the first public relations departments with the aim to spread
government messages (Malan & L'Estrange, 1965:9) and by the early 1980s most government
departments and government-sponsored industries such as iron, steel and oil, had public relations
departments (Malan & L'Estrange, 1981:10). Even in these high days of apartheid rule the role of
public relations was said to be "the development of opportunities for interaction between various
groups to communicate better which will ensure cooperation and assist to create peace and
prosperity" (Malan & L'Estrange, 1981:11). An artificially created environment enforced by the
apartheid policies resulted in parts of the country being developed for white South Africans in line
with a modern westernised society, whilst black South Africans were restricted to specific areas
such as homelands and townships with limited development. During this period white public
relations practitioners approached their roles from a westernised (US and UK) point of view, while
the black practitioners working for organisations in the homelands followed a development
communication approach (Holtzhausen, 2005:408). Public relations developed in different phases
which started with fundraising, publicity and press agentry, but moved to more sophisticated
information dissemination and counsel to management structures (Rensburg, 2007:332). During
the period 1957 to 1994 much was done to develop public relations in South Africa and included
education, research and the establishment of a professional body. Developments at academic

institutions saw the establishment of formal qualifications such as diplomas and degrees in public relations and communication, equipping public relations practitioners for positions in government and big business. Some of the first formal educational programmes were started by PRISA in 1958 and in 1968 by the Witwatersrand Technical College which later became the Technikon Witwatersrand and in 2005 merged with the 'Randse Afrikaanse Universiteit' (RAU) to form the University of Johannesburg (UJ) (Rensburg, 2007; Skinner & Benecke, 2014). Research conducted in the public relations discipline during 1957 to 1994 period was limited and mostly focused on the improvement of communication processes and public relations practices to benefit organisations and government which mirrored the modernist approach followed in the US (Rensburg, 2007:332). The founding of a professional body, the Public Relations Institute of South Africa (PRISA) took place in February 1957 with 23 members (Skinner & Benecke, 2014). The name was later changed to the Public Relations Institute of Southern Africa to include the bigger region as it welcomed members from Namibia and Botswana. The influence of the socio-political environment was evident in the profile of the PRISA membership, in being predominantly white with the first black members joining the Association in 1976. The active involvement of students started in 1978 with the introduction of student membership and the revision of education and training programmes offered by PRISA to meet the needs of the changing environment in 1987 (Rensburg, 2007:352).

Political pressures against apartheid mounted both within the borders of South Africa and from the rest of the world, seeing the unbanning of some of the apartheid laws such as the pass laws in 1986, introducing a new era in South Africa's political environment. Gradually other laws were also lifted, the unbanning of the African National Council (ANC) in 1990 and Nelson Mandela being freed from his Robben Island prison after serving 27 years of his life sentence.

Public relations in the earlier years of a democratic South Africa

Democracy became a reality in South Africa with the first democratic elections held in April 1994. Locally and internationally many people were apprehensive about the transition, some expecting and predicting the worse possible scenarios and others promoting the positive effects these changes will have on unifying South Africa. The country experienced a peaceful transition and today many regard South Africa as an ideal setting to research development, the influence of Western and African cultures and a possible emergence of a third culture (Bardhan, 2011:88) as it navigates the influence of economic and political changes (Rensburg, 2007:342).
The changes in the socio-political environment also played a role in developments observed in the public relations industry. During 1991 PRISA members represented South Africa in Canada at the World Congress (Rensburg, 2007:352), followed by an international Institute of Public Relations (IPRA) conference hosted for the first time in Cape Town, South Africa. PRISA established itself as a founding member of the Global Alliance of Public Relations and Communication Management in 2000 and hosted the 2007 Global Alliance World Public Relations Forum, symbolising the new era for public relations in South Africa, in joining the global context. With public relations in South Africa being regarded as the most mature on the continent, it is certain to influence its environment ensuring that opportunities for development are used to the benefit of all citizens and in service of the rest of the continent (Roodt, 2011). In the 2014 Global Alliance's Generally Accepted Practice (GAP) study for South Africa, conducted by the University of Pretoria, it was found that the majority of public relations practitioners employed by organisations also have offices in other countries with many also working in the SADC region (GAP study report, 2014:2).
Maturity of the South African public relations industry can be partly attributed to the more than 50 year history of PRISA. Formally recognised by the South African Qualifications Authority (SAQA)

as the professional body of public relations in South Africa, it played a key role in the historical development of public relations in South Africa and continues to promote the professional reputation of the profession. Regional committees throughout the country represent the interest of members and offer networking opportunities while professional development events ensure the continuous improvement of public relations practice. The diverse profiles of members represent the complexity of the industry, with members holding positions in private, public and consulting organisations with the majority responsible for the reputation of their organisations, followed by media relations and employee communication (GAP study report, 2014:25). Respondents to a study exploring the influence of political change in South Africa on public relations practice were female, aged around 35 with the average respondent having 10 years' experience, the majority holding degrees and placed in managerial positions (Holtzhausen, 2005:409). Unfortunately, membership numbers have been dwindling in recent years, which may be in line with findings from the CCI benchmark study (De Wet, Meintjes, Niemann-Struweg, Goodman, 2008) which stated a need for professional development but not necessarily by means of a centralised, formalised structure such as a professional body.

Historical changes and the development of public relations knowledge and practice

The historical changes in South Africa did not only influence public relations, but public relations practitioners also affected and influenced organisations and society with their knowledge and practices. After joining the international arena in 1994, South African public relations experienced a boom in knowledge with various benchmark studies measuring public relations development, numerous research studies being conducted and academic journals publishing research articles illustrating key findings. A key theme in much of the research is the move from purely tactical public relations and a modernist approach to a more strategic and reflective approach with the emphasis placed on providing strategic council to organisations. Examples of such changes in public relations knowledge and practice are the implementation of the King III Report on stakeholder relations, integrated reporting and the development of the Pretoria School of Thought. The King III report offers guidelines to listed companies about stakeholder relations, governance and sustainability, whilst providing public relations and communication managers with the opportunity to be at the boardroom table advising senior decision-makers (De Beer & Rensburg, 2011). Integrated reporting is regarded as a new concept in South Africa and the rest of the world, offering organisations guidelines for acceptable practices to evaluate their performance holistically and to give a comprehensive report to stakeholders in aid of decision-making (Makiwane, 2012:1). The Pretoria School of Thought initiated by Benita Steyn in 2000 (De Beer, Steyn & Rensburg, 2013:307) introduced a new approach to strategic communication management, which combines both the US and European approaches to public relations knowledge and practice. The theoretical pillars included in this approach reviews the role of the strategist on macro level, which contributes to the development of corporate strategy; a re-definition of the communication manager's role at a middle management level and the development of communication strategy in line with corporate strategy. A key aspect forming part of this approach is an acknowledgement of the triple context environment, namely people, planet and profit (De Beer et al, 2013:317). In spite of these developments and many related contributions made by other scholars and public relations practitioners, public relations in South Africa is struggling with a reputation dilemma which include, amongst others, a lack of integration between various specialisation areas, improved educational levels, easy entry points which influence the stature of the profession and lack of experience at strategic levels (Roodt, 2011). Given the dynamic, diverse and complex South African society, the public relations profession have many challenges but also major opportunities for future development. Achieving success and making the most of these opportunities will demand from

public relations practitioners to meet both the challenges from inside the profession and from the environment.

Government

South Africa now has a population moving towards 53 million people (South Africa Government Online (n.d.), spread across nine provinces: Eastern Cape, Free State, Gauteng, KwaZulu-Natal, Limpopo, Mpumalanga, North West, Northern Cape and Western Cape. Gauteng is the most populous province mainly because it is seen as the business bread-basket of the country.
Ruling party: The African National Congress (ANC) has been elected as the government every election since 1994, which was a watershed election, being the first post-apartheid election. On 7 May 2014 South Africa held its 5th democratic election, marking 20 years of post-Apartheid freedom. According to the Independent Electoral Commission iPhone app (2014), there was a 73,48% voter turnout for this last election, with 29 political parties on the ballot paper, where the ANC received 62,15% of the votes while the Democratic Alliance (DA) – the official opposition – obtained 22,23% and the party with the least votes, namely the People's Alliance, won 0,01%. It should be noted that, excluding the ANC and DA, none of the other 27 parties were able to capture above 7% of the vote. A new entrant on the ballot paper was the Economic Freedom Fighters (EFF), who came in third after the DA with 6,35% of ballots cast (Electoral Commission iPhone app, 2014). Its leader is the controversial former leader of the ANC Youth League, Julius Malema. Kaloo (2014) stated that the EFF picked up disgruntled ANC votes because: "… the EFF has presented a mouthpiece where once silent dissent was the only option" and "…one cannot shy away from the fact that very many of the questions they have posed speak directly to the heart of their constituency. Issues surrounding poverty, job creation and nationalization." Whilst the ANC still won by a resounding majority, what was significant about the 2014 election is that it signaled a shift; in the 2009 national elections the ANC won by 65,90% and the DA received 16,66% of votes (South African Government News Agency, 2009).

Human Development Index (HDI): The index investigates life expectancy, the quality of that life, access to knowledge and a decent standard of living. South Africa received a value of 0.629 for 2012 (which is below the average for other BRICS countries), which placed it below the average for countries in the medium human development group, achieving a ranking of 121 out of 187 countries. It should be noted that a comparison from 1980-2012 reflects that when it comes to expected years of schooling, mean years of schooling and Gross National Income, all illustrated an increase from the values indicated for 1980 compared to the value for 2012, with the exception of life expectancy (Human Development Report, 2013:2,4). Currently, life expectancy across the genders is about 50 years.

Wall Street Journal's Index of Economic Freedom: South Africa came in 75th out of 177 countries in the 2014 index, with a foreign direct investment inflow of $4,6 billion. Part of the problem is that the economic base needs to be diversified far more. South Africa received lower scores in six areas in comparison with the previous Index, namely government spending, fiscal freedom, business freedom, labour freedom, monetary freedom and trade freedom, whilst it improved on investment freedom and freedom from corruption. Part of the problem is that the government has had to focus on controlling inflation and the budget deficit. Also, private property rights have come under pressure as land reform policy looks to shift farmland ownership to Black South Africans (The Heritage Foundation, 2014).

Global Corruption Perception Index: According to Finweek (2013), this report from Transparency International, indicates that South Africa received a score of 42 out of 100. Reasons for the score include:

- o Increased public activism in the form of service delivery protests
- o Reporting corruption to independent civil society organizations
- o Outcry over the abuse of public resources
- o Loss of trust in various forms of leadership.

World Economic Forum's Global Competitive Report: Schwab (2013:43) states that South Africa is placed 53 out of 148 counties, meaning that they came second amongst BRICS countries after China. Some of the areas that require attention:

- o Decreased presence in the macroeconomic environment
- o Perceived wastefulness of government spending
- o Lack of public trust of politicians
- o Minimal skilled labour force
- o High levels of unemployment
- o Poor comparable quality of education
- o Rigid labour legislation.

Leadership: MarketLine (2013:45) provides a snapshot of the different kind of leadership styles associated with the various Presidents of post-Apartheid South Africa, summarizing as follows:

> "During Mandela's five-year term as president, the government committed itself to reforming the social fabric of the country. Former President Mandela, who was also the leader of the ANC, concentrated on national reconciliation and sought to forge a single South African identity and a sense of purpose among the populace. Mandela resolved to reintroduce South Africa into the global economy by implementing a market-driven economic plan known as the GEAR Strategy. In addition, in order to heal the wounds created by apartheid, the government created the Truth and Reconciliation Committee under the leadership of Archbishop Desmond Tutu. Nelson Mandela stepped down as the ANC president in 1997, allowing Thabo Mbeki to assume the mantle of leadership. President Mbeki shifted the government's focus from reconciliation to transformation, particularly on the economic front. While running for the third time for the ANC chair in December 2007, he was defeated by party stalwart Jacob Zuma when members expressed unanimous dissatisfaction with Mbeki's governing style. Despite Zuma's success in obtaining the party presidency, Mbeki remained president until he resigned from the post on September 25, 2008. Jacob Zuma, the leader of the ANC, was officially chosen as the country's president by the newly elected parliament in May 2009. In May 2011, the opposition party, Democratic Alliance, doubled its share of votes in the local elections and in November 2011, the ANC's youth leader Julius Malema was suspended due to inflammatory speeches against Zuma and the party and for inciting hate. In January 2012, the ANC celebrated its centenary. Jacob Zuma was re-elected as the party president in the five-yearly electoral conference of the ANC, which was held in December 2012".

Issues for the Profession

Social

South Africa is a diverse country with population over 50 million. The main ethnic groups are: African 79%, Whites 8%, Coloureds 9% and Indian 4%. Known as the rainbow nation, South Africa has 11 official languages with English being the main business, administrative and education language.

South Africa has made significant progress in its social development in the last 20 years since the fall of apartheid, however many social challenges remain. Living standards have improved and poverty rates dropped by 10% in the last 20 years (IMF 2013) however, the country is ranked 121st out of 187 countries in terms of the Human Development Index (UN 2013). South Africa has high access to education with over 98% boys and girls between the age of seven and fifteen enrolled at schools (Marketline 2013). Hoewever, the improvements in average years of schooling among previously disadvantaged groups has not necessarily translated into greater employability, as there is more demand for labour with complete secondary education, tertiary education and specific vocational education (Leibrandt et al. 2012).

Poor education and skills mismatch contribute to high unemployment, which stands at 25% (34% including those who stopped seeking employment), with youth unemployment reaching 50%. There is a high disparity in living standards among different racial groups with many blacks still living in poverty. Many families rely on social grants such as child support and old-age pension.

Although the black middle class has grown significantly in the last two decades, South Africa remains a country with widening gap between rich and poor. The country's Gini coefficient is one of the highest in the world at 63.1 (World Bank, 2012). The coefficient measures the extent to which the distribution of income among individuals and households deviates from perfectly equal distribution, where 0 resents perfect equality and 100 perfect inequality.

Despite considerable effort made by the government to improve quality and access to healthcare, South Africa's performance in this area is poor in comparison to other countries with a similar level of development. Relatively high infant mortality, tuberculosis and HIV prevalence are a major health risks. HIV infections in South Africa has increased from 10.6% in 2008 to 12.2% in 2012, and the total number of infected South Africans now stand at 6.4-million (HSRC 2014). The average life expectancy in South Africa is below 50 years (Marketline 2013). Another threat to the health of the nation is the increase in drug abuse, especially in poor communities.

The Unions in South Africa play an important role in politics and society, having a significant role in the country's transition from apartheid to democracy. There is a growing dissatisfaction among the workers with wages and working conditions in all major sectors including mining, manufacturing and agriculture, which result in frequent industrial action and social unrest. The system of centralised wage-bargaining leads to the so called "strike season", which disrupts production and occasionally leads to street violence.

As a result of the social problems there have been a continuous demand for community development initiatives and participation in welfare programmes. Combating poverty and crime, improving access to basic services, health and education, and food security remain a challenge in South Africa and public-private partnerships are necessary to make a difference. The government

launched a National Development Plan (NDP) in 2012 with aim to eliminate poverty and inequality by 2030. The main focus of the NDP is the improvement of infrastructure, education, healthcare education and social protection, the promotion of accountability and the reduction of corruption levels. However, without participation of business, individuals and civil society, achieving these goals will be impossible.

Business

South Africa is a middle-sized economy with services and tourism, mining, manufacturing and agricultural sectors making the major contribution to the economy. South Africa is known for mining such commodities as gold, platinum, diamonds, manganese and chromium, aluminium silicate and titanium. Other important industries are paper and pulp, clothing and textile, steel, car manufacturing and fertilizer production. The South African mining and manufacturing sectors were traditionally the highest revenue earners; however, in the past decade, services have become the largest contributor to the economy. Today, the service sector contributes to 2/3 of the GDP and creates 70% of the country's employment (MarketLine 2013). As one of the most successful tourism destinations, tourism is one of the subsectors that has a significant potential for growth.

South Africa is a self-reliant food producer and a major food exporter. Its main products are corn, wheat, sunflower, sugar cane, fruit, beef, mutton and dairy products. The country has a dual agricultural structure with large, well-developed commercial farms, mainly in the hands of white farmers, and subsistence farming taking place in rural areas. Land reform is one of the main priorities of the government.

A number of factors can count in favour of future prospects for the South African economy. South Africa's Johannesburg Securities Exchange (JSE) has been in existence since 1887 and is one of the few internationally known African stock exchanges (IHS, 2014). In 2004 the JSE launched the Social Responsibility Index (JSE SRI), which informs investors about the corporate responsibilities practices of listed companies. South Africa has a world class banking system, well capitalised and with a strong regulatory environment. For instance, South African banks have voluntarily implemented Basel III norms since January 2013, even though South Africa is not a member of the Basel Committee (IMF 2013). However, the volatility of local currency – the rand – can have a negative influence on businesses and a society as whole.

South Africa has good IT and telecommunication infrastructure and among the highest penetration of cellular and fixed telephone lines on the continent. Over 95% of South Africans have access to telephones and despite broadband internet being significantly more expensive than in the developed world, nearly 50% has access to the Internet (Statistics SA, 2014). Such conditions create numerous opportunities to reach customers and other stakeholders.

Despite government investment in country infrastructure such as roads and public transport, challenges remain, especially in terms of electricity supply, which is inadequate to sustain the economic and social growth. In fact, electricity supply, crime, and an inadequately educated workforce are perceived by the firms as the biggest challenges in the business environment in South Africa (Enterprise Survey 2007).

Business challenges

South Africa has made significant progress in economic development since the fall of apartheid in 1994. However, after the sustained economic growth of over nearly 4 % per annum, since the onset of global financial crisis of 2008-2009, South Africa has been experiencing a lower growth rate. Aspects such as unemployment reaching 25%, a shortage of skills, growing current account and fiscal deficits (IMF 2013) lower the growth prospects for the future.

Strained labour relations are another major factor faced by South African business. The recent labour dispute in the metal and manufacturing sector and prolonged strike in the platinum industry may result in far-reaching changes. There are some indications of an increased use of automation in the production process, possible lay-offs and the selling-off of the mines by the large developers to smaller companies. These events will have consequences for the relationship between business and the stakeholders, as many unpopular decisions have to be communicated to the concerned stakeholders.

South Africa with its liberal trade policies is an active participant in the global economy. It is a member of the Southern African Customs Union, the World Trade Organisation, has free-trade agreements with European Union, and continues to strengthen its commercial ties with Asian countries. South Africa also hopes that having become a member of BRICS, comprising top developing economies – Brazil, China, Russia and India – will aid its development. Globalisation allowed South African companies like SAB Miller, Anglo American and Sasol to become major players in global markets. Companies such as MTN and Standard Bank are focusing on expansion into African markets. Globalisation also has an impact on the domestic business, with South African companies having to compete against foreign companies. An example of the negative impact of globalisation on South African business is the virtual demise of the textile and clothing industry in the country. Competitive pressures require South African companies to look for innovative ways to improve the value they offer to the customers. In an effort to stimulate local economy and encourage the consumers to buy local products, the Proudly South African campaign was launched in 2001. The campaign is supported by government, the business community and the unions.

Unique to South Africa is the high level of micro-enterprises participating in an informal economy, examples of which are street vendors, small retail stores known as *spaza* and *tuck shops*, and informal taverns known as *shebeens*. It is estimated that over 100 000 such outlets exist in South Africa (Woodward et al., 2014). These entrepreneurs do not have basic business skills or access to capital and depend on their own ingenuity and on the business development CSR initiatives of large companies such as Coca-Cola (Woodward et al., 2014) and Vodacom.
Small business, formal and informal, is expected to play a significant part in job creation and economic growth. However, the small and medium enterprises in South Africa face numerous challenges, ranging from lack of finance to combating the red tape and overcoming corruption. In addition, the structure of the South African economy, which is dominated by oligopoly in major industries such as banking, media, food manufacturing and transport, creates high entry barriers for smaller enterprises. The cases of industry-wide collusion are well publicised, with the construction and food industry being the latest examples. Such occurrences have profound implications on public trust in companies and brings the business ethics and governance mechanism into question.

In a bid to improve its competitiveness and attractiveness to local and global investors, as well due to new developments in the field of corporate governance worldwide, South Africa continues to

refine its system of corporate governance. The latest King Report and the Code of Corporate Governance, collectively known as King III, was released in 2009 following the repercussions of a global financial crisis, changes in the company law and the falling trust of the public in big business. While promoting voluntary implementation of the "apply and explain" principle, the code urges application of the code to all types of organisations – business, non-profit and public sector. King III acknowledges the important role that companies play in the creation of wealth and employment and at the same time promotes the governance philosophy which rests on three pillars: ethical leadership, sustainability and corporate citizenship. The inclusivity of stakeholders, innovation, fairness and social justice, as well as post-apartheid social transformation, are the principles that guide corporate governance in South Africa. In addition, the King III code requires from the companies to provide integrated reporting, where sustainability reporting is integrated with financial reporting (IOD 2009).

Broad-Based Black Economic Empowerment

Broad-based economic empowerment is a set of policies introduced by the South African government to increase the participation of previously disadvantaged groups – people of colour, women and the disabled – into the mainstream economy. These efforts are focusing on increasing the number of previously disadvantaged persons as owners and managers of firms, skills development and promoting preferential procurement from the companies with high B-BBEE scores. The policy is governed by the series of acts including the Broad Based Economic Empowerment Act, the Employment Equity Act and Preferential Procurement Act and Skills Development Act. These acts are mainly aimed at medium and large enterprises and are governed by additional frameworks such as industry charters. The government introduced institutional mechanisms for the monitoring and evaluation of B-BBEE in the economy through the accredited verification process (www.dti.co.za). As a result, companies have to pay more attention to changing ownership structures, developing human capacity in accordance with the B-BBEE framework and focus on skills development and empowerment.

Corporate social responsibility

In South Africa, as a result of the historical and social context, corporate social responsibility (CSR) involves the integration of social, environmental and affirmative action and skills development (Hinson & Ndlovhu 2011). This broad definition of organisational responsibility to the society is reflected in the preferred term used in South Africa: Corporate Social Investment (CSI) (Skinner & Mersham 2008). CSI refers to business's contribution to the sustainable development of the country, governance and public-private partnerships (Hinson & Ndlovhu 2011).

There are growing social expectations for companies to play a more active role in achieving the goals of national development, including poverty alleviation and community development. As a result there are many examples of companies having foundations involved in charitable giving, supporting community schemes and introducing staff volunteering programmes. However, a large chunk of CSI contributions in South Africa comes from a relatively small number of large companies (Skinner & Mersham 2008). There is also criticism that most companies only respond to legal requirements and that there is a lot of room for improvement in terms of organisations' responsiveness to the society. CSI funding is consistently growing, but the needs are much higher and therefore it is essential that companies apply a strategic approach to CSI and use the scarce resources strategically to achieve the highest impact (Skinner & Mersham 2008).

South Africa introduced a number of legislative measures aimed at environmental sustainability and protection of the natural environment. South Africa is also a signatory to UN's Agenda 21 on sustainable environmental development and endorse the Kyoto protocol. But its dependence on coal-generated energy and energy-intensive industries such as mining result in gas emissions higher than the global average per capita (Mzenda & Jongh 2011). Other major areas of environmental concern are the contamination of water because of mining activities and protecting the country's water supply from pollution. Implementing and enforcing the environmental policies remain a challenge. There are many cases of disregard for environmental policies, in particular within the manufacturing, infrastructure and housing construction sectors (MarketLine 2013).

Individuals

Public relations professionals influence the use and credibility of messages, as well as how the content is experienced by stakeholders (Tench & Yeomans, 2014:200). Understanding stakeholders and their needs in terms of communication messages is important when analysing the effect and measuring the value of public relations activities. In a country with a history like South Africa, where information was often kept secret or translated into propaganda, transparency, trust and a stakeholder-centred approach are essential changes needed for ethical public relations practice. Steyn and De Beer (2012:49) refer to the societal responsibility of strategic communication management to provide information and intelligence to the strategic decision-making process and in so doing, to achieve legitimacy and trust for the organisation. Shifting the focus from organisations practicing one-way communication to one in which stakeholders play a key role in the type of communication message and the manner of distribution, requires a different approach by public relations practitioners.

In the 2nd edition of the South African Handbook of Public Relations, Skinner and Von Essen (1982:5) highlight the growing media costs facing advertising and predicted that "marketing people will look more to their public relations counterparts to provide a supplementary method of reaching their target audiences", indicating the technical support public relations was required to offer marketing. In the 5th edition of the same handbook, it is written that "fundamental to public relations is the establishment of mutual understanding between different parties", indicating the more balanced two-way communication approach (Skinner & Von Essen, 1999:5). In the 10th edition of this handbook the emphasis is on integrated communication, highlighting the changing focus to include marketing, advertising, sales and public relations communication messages in the overall business strategy of the organisation (Skinner, Mersham & Benecke, 2013:4). The development was confirmed by the GAP study findings, in which respondents representing organisations confirmed that the public relations function is situated in a central marketing communication department, mostly responsible for the corporate communication, and that public relations is taken seriously for its contributions on strategic levels (GAP study 2014).

Individuals influence communication messages

Public relations practitioners in South Africa are tasked to develop communication messages which traditionally focused on communicating *to* the various target audiences on behalf of the organisation, but this approach changed to also include messages promoting and selling the services or products of the organisation (Rensburg & Cant, 2002:37) and planning consultative, inclusive and participatory communication opportunities (Holtzhausen, 2005:411). Public relations

practitioners were also affected by the changes in the environment with their role in business changing from primarily focusing on the financial bottom line to include the development of social value for the organisation (Holtzhausen, 2005:414) with the aim to grow their social capital. Social capital refers to the connectedness and the quality and quantity of social relations within a population (Harpham, Grant & Thomas, 2002:106). More innovative and culturally sensitive messages had to be designed and practitioners were tasked to bring other perspectives to the boardroom table to assist managers in addressing their uncertainty in the changing South African context (Holtzhausen, 2005:415).

A changing environment does not only require different approaches to normative practices, but also require different competencies from its practitioners. Public relations practitioners can be seen as content developers and communication message designers who have to ensure that they are competent in meeting the research, language and cultural demands for credible messages from stakeholders. The interconnectivity of society enables receivers of public relations messages to test and confirm content, to evaluate these messages against their own experiences and decide about future action. In the event of messages not correlating with their experiences, credibility will be lost and the reputation of the content designers, namely, the public relations practitioners, questioned. The question arising from this development is whether public relations practitioners have the necessary knowledge and expertise to adhere to these demands.

In many of the most recent studies on public relations issues conducted in South Africa i.e. the GAP study (2014), CCI benchmark study (2008), and the ethics survey (Verwey, 2014), it was found that public relations practitioners were educated, with many holding university qualifications, with an average of 10 years' experience (Holtzhausen, 2005). This is in contrast with responses from previous PRISA presidents in the Roodt (2011) study, that highlighted the lack of expertise, easy access to the profession and lack of a regulatory structure as reasons for the lack of credibility experienced by public relations in South Africa. Adapting to change takes a concerted effort at a variety of levels, over an extended period and with flexibility as a prerequisite. Being able to adapt to stakeholder demands for transparency and aligning with audience expectations for credible information are key factors for the survival of the public relations profession. Trustworthy messages from credible sources, introducing stakeholders to how others behave and operate, seem to be more successful than direct messages on how they should change their behaviour. A persuasive approach to influence behaviour seen in advertising and public relations is the 'nudge theory' developed by Thaler (Tench & Yeomans, 2014:200), which seem to be more successful in changing behaviour. This theory resonates with the LeadSA initiative introduced by Primedia Broadcasting and Independent Newspapers in 2010. The objective of this initiative is to develop active citizenship through addressing everyday social issues, building networks and acknowledging efforts to bring about change. Changing the perceptions of poor reputation, lack of credibility and relevance of public relations in South Africa will require many further initiatives (Roodt, 2011), starting with PRISA reclaiming its role in restoring the status of the profession and practitioners to play a transformational role the South African society. It is also proposed that public relations practitioners need to stay abreast of social media developments and the role it plays in message distribution. They are furthermore to improve their strategic business knowledge, moving away from technical to strategic focus, forming a base of reference within PRISA, and understanding that communication and public relations stand in a dynamic, co-creational relationship which requires integration (Roodt, 2011:28-29).

Media platforms influencing message credibility and stakeholder experiences

Message credibility and the experiences stakeholders have of organisational commitment in serving their interests, are important aspects influencing trust in the organisation. A lack of trust leads to disconnectedness, which influences social capital (Heath, Toth & Waymer, 2009:79) and the trust in the public relations practitioner who acts as the messenger. Trust in organisations has been on the decrease with the Edelman Trust barometer revealing lowest levels of trust since its start in 2001 (Tench & Yeomans, 2014:201). The 2014 Edelman Trust Barometer indicated that the trust in the South African government has decreased by 46 points, but states that the licence of business to lead is getting stronger (Edelman Trust Barometer report, 2014:4). It is important to note that business is not trusted to self-regulate but that it needs, together with government, to develop policies affecting society. As content developers and communicators of organisational messages using different media platforms, public relations practitioners should ensure that messages are integrated and appropriate media platforms used to distribute messages. Booth and Matic (2010) highlight the importance of accurately identifying new influencers associated with the rapid development of social media and the influence of social media in communicating credible messages. Social media has become an essential platform together with traditional media to distribute messages. It is important to align messages with business strategy, communicating via appropriate media platforms and constantly measuring effectiveness.

Enhancing experiences through storytelling

The concept of storytelling has its roots in longstanding South African traditions with praise singers (called *imbongi* in isiZulu) capable of composing a poem for any event or person (Sheppard, 2004). At the 2014 PRISA conference, Andrew Miller inspired conference delegates with his take on storytelling and its relevance to public relations messaging, calling on public relations practitioners to close the gap between "what they say" and "the truth" and to remember that communication is "differently amplified by different individuals" (Communika, July 2014:15). Digital storytelling (Tench & Yeomans, 2014:249) and the narrative approach (Yaxley, 2013:113) introduce public relations practitioners to the value of memorable, dynamic and easily distributable information. Such information creates a mental image, a distinctive voice which stays with the listener and a product which is distinctly associated with the organisation.

Future for the Profession

Trends

Moving to mobile

Perched at the foot of Africa, South Africa has the second largest economy and one of the largest telecommunications markets on the African continent. This is a country where the number of cellular phones surpasses the number of 51 million inhabitants living in the country (Southafricaweb, 2014). Although half of the 51 million people in South Africa live below the poverty line, more than 75% among those in the low-income groups who are 15 years or older, own a cellular phone (Peyper, 2013). The country has a national cellular phone penetration rate of 128% with the vast majority of South Africans utilizing prepaid cellular phone accounts. Furthermore, penetration of cellphone users is the highest in provinces such as the Free-State, North-West, Mpumalanga and Limpopo.
Cellular phones are the dominant form of communication technology among low-income groups and informal businesses within the country. A large percentage (98.5%) of people within the low-income groups in South Africa utilize prepaid services with 80% of these connections being from urban areas and 94% from rural South Africa (Tubbs, 2014). Even though the majority of cell phone users utilize prepaid accounts, a dramatic shift from 2012 onwards was noticed where people where moving away from spending on voice calls and moving towards spending on data connections.

Drop in data connection costs

A study conducted by World Wide Worx (2014), found that spending in the South African mobile market shifted between 2012 and 2013 as voice dropped from 73% of the mobile budget to 65% and expenditure on data increased from 12% to 16%. This meant that South Africans were using their smartphones to connect to the Internet and download material or access and connect with other people and brands on social media platforms rather than making voice calls. The rise in spending on data connections is attributed to the high cost of personal computers and poor coverage with fixed communication lines. According to Southafricanweb (2014), South Africa is in a situation where many see a cell phone as a basic necessity. The cell phone is "seen as the tool to bridge the digital divide between the rich and the poor and become an enabler of economic development" (Southafricanweb, 2014).

In light of the popularity of mobile services in South Africa, it should be noted that the use of mobile services, particularly prepaid mobile voice prices, is very high (Mochiko, 2013). According to The South African Communications Forum these high costs "restrict and limit significant engagement with the tools and resources available through the Internet for a majority of South Africans" (Mochiko, 2013). Mochiko (2013) continues and adds that "even those who have limited access do not become fully fledged digital citizens able to utilize the maximum benefits of ICT (information and communications technology)".

However, this problem has recently been addressed by The Independent Communications Authority of South Africa (ICASA), that announced that from March 2014 mobile termination rates (the rates operators charge each other to carry calls between their networks) would be halved. According to ICASA the decision was taken in a move to stimulate economic growth. "As we get

down to the business of regulating this sector, our beacon is to attract local and foreign investors, and position this industry as a sector of choice," said Nomviyiso Batyi (a councillor at ICASA) (Anon., 2014). This meant that as from the 1st of March 2014 mobile termination rates dropped from 40c to 20c. It will drop to a further 15c in March of 2015 and to 10c in 2016. Batyi is of the opinion that, "We regulate to create competition and choice for the consumer and end-users so that they can get value for money and quality of service. We regulate so that our young people can get opportunities not just to gain employment, but to generate employment and establish enterprises that would stimulate economic growth and opportunities" (Anon., 2014). The announcement by ICASA is to the advantage of South Africans at large, as this will allow for people to connect to the Internet and utilize web 2.0 technology and tools at a cheaper rate. Web 2.0, also known as the collaborative web or 'participative web' has become a very popular technology in South Africa, as this technology enables the use of social media tools and platforms (Wunsch & Vickery 2007: 8). The use of this technology has not only led to virtually limitless connectivity and low cost access, but has also resulted in a new communication model where South African consumers are no longer passive recipients but active participants in their interpersonal communication or any other communication they might have with organizations and brands (Wunsch & Vickery 2007: 8).

The digital South African: from recipient to participant

The South African Communication Management and Public Relations environment is very similar to that of the global environment, as the rise of the digital market space has not just become one of the major trends, but has changed how communication takes place within this environment. The rise in the use of digital technology has led to a shift in communication patterns and moved from two-way conversations to many-to-many, collaborative communications that usually take place via open platforms (Van den Dam, Nelson & Lozinski, 2008:1). This shift is altering the South African competitive landscape in communications and giving rise to emerging communication models. The emergence of new communication models, which emphasises many-to-many forms of communication, has transformed recipients into active participants, content consumers into content generators, and recipients into producers (Obasanjo 2007; Dmochowska 2008; Mullins 2011). Consumers are no longer passive users, but have become active influencers through the use of social media platforms (Brito, Vanzin, Ferasso, & Saldanha, 2010:114). Social media is primarily about collaboration, users generating content, sharing and connecting (Stokes, 2008:124). These individuals now function in an environment where the F-Factor (fans, friends and followers) plays an important role and this refers to the fact that a person interlinked with many other people on social networks may have more power to influence, through collective collaboration, than others who are less connected. This is facilitated through sites and social media platforms such as YouTube, Twitter, Facebook, Wikipedia, LinkedIn, Foursquare, MySpace, Mxit, and blogs.

The use of social media platforms is very popular in the South African context with platforms such as Facebook having 9,6 million South African registered users. Similarly, other social media platforms such as Twitter also show popularity with 5.5 million users in South Africa, showing a 129% growth in 12 months (World Wide Worx, 2014). Twitter has grown by +126% from 2012 with 50 million tweets posted monthly from within South Africa (Meier, 2013). This platform is more popular with a younger South African market, with a majority of 60% of Africa's most active Tweeters being between the age of 20 to 29 years. Moreover, the social media platform that is currently showing the biggest growth for 2012/2013 in the South African context is Pinterest, with a growth rate of 136% for 2012/2013. The popularity of this tool becomes apparent when one considers that 1,2% of all Pinterest users come from South Africa and they generate 1,5% of all

the page views on Pinterest (Meier, 2013). This platform is predominantly used by older users, with the majority of them being between 25 to 34 years of age, with women being five times more likely to pin than men. These women are mostly middle to upper class white women pinning about travel, cooking, fashion. In comparison to the aforementioned, the two least favourable social media platforms for 2012/2013 within South Africa were LinkedIn and Google+. LinkedIn had only 2,7 million users in South Africa, with only one out of 10 South Africans being registered on LinkedIn. According to Meier (2013), the average user is 25 to 34 years old and holds middle management positions, with 183 000 entrepreneurs being active on this platform. The majority of users are from the finance industry. In addition, Google+ had 466 828 active users with agencies, airlines, automotive, blogs being noted as the largest users of Google+ accounts.

Based on the statistics discussed above it is evident that social media platforms are very popular within the South African communication context. Similarly, many South African organisations use social media to build and sustain strong relationships between the organisation and its stakeholders. In support of this, Meier (2013) states that the majority of the top 50 brands in South Africa all have Facebook pages, with an average of 58 000 fans per page and a collective 48% fan growth per month.

Many South African organisations have successfully utilized social media as a communication and public relations tool. One such brand is the Nelson Mandela Children's Fund. In honour of the 'Legocy' of Nelson Mandela, the Nelson Mandela Children's Fund launched the 'You're never too young to know the whole story' campaign during the latter part of 2014. This campaign is aimed at keeping Mandela's legacy alive to children of all ages. A one-minute, forty-two second Youtube clip 'Madiba: our country's greatest story told in Lego' utilizes Lego figures to follow Mandela's journey from the Pass Law protests of 1960 through the subsequent Rivonia Trial and imprisonment on Robben Island to freedom and ultimate reconciliation for South Africa as a whole. The soundtrack to the clip is a recording of the famous excerpt from Mandela's Rivonia Trial speech, in which he declared that he was prepared to die for a free South Africa. During the clip people are asked to add their name to their request to Lego for the creation of an official 'Madiba: Freedom Fighter' Lego set, which is to be handed to Lego on 5 December 2014. The viewer of the video is then directed to www.legocy.co.za and asked to share an icon with the world. The use of social media in this context highlights the relevance of shared media (use of social media to promote an issue or brand) as a communication tool, rather than the organisation using earned, owned and/or paid media.

Similarly, Nando's has also used social media effectively as a public relations tool with the '#25 Reasons we love South Africa' campaign. This campaign's objective was increased online engagement and conversations to boost awareness of the limited edition birthday meals during the campaign and to encourage people to create and share their own '#25Reasons we love South Africa'. This was a very successful campaign that generated R1 314 141 of exposure in online mentions alone. The campaign was launched on the social media tool Pinterest and had 571 followers within the first week of the campaign. It generated more than 460 000 Youtube views, more than 1 000 shares of Nando's Pinterest content, 7 333 tweets and it also trended nationally (Retroviral Digital Communications, 2013).

Campaigns like the two mentioned above, clearly illustrate the use of social media platforms by organiations and brands as a trend; it also sheds light on the relevance of the digital native as part of any organisations' audience. Digital natives are individuals that were born into technology and utilize it in their day-to-day activities. In light hereof, it has become imperative for organisations in the current environment to pay attention to a group of individuals referred to as the 'millennials'.

Research conducted by Nielsen show that millennials, individuals who are aged 18 to 36, is currently a very important audience to most organisations and brands in the current business and communication environment (Alexander, 2014:13).

Millennials as an important stakeholder group

One stakeholder group that does seek connections through the use of social media is millennials. Millennials are individuals born between 1982 and 2003 (currently 18-36 year old); this group is also referred to as Generation Y (Viacom, 2013).

Millennials are an important stakeholder group, as under 23s make up over 52% of the South African population, which spent an estimated R98,7 billion in 2011 (Oosthuizen, 2011:22). The millennials are a group of people that need to be taken into consideration in the South Africa environment by many organisations and brands, as these individuals are characterised by their use of technology to research products and share information about brands (Alexander, 2014:13). This is not surprising, considering that they watch less television than any other age grouping (Alexander, 2014:13). Rubombora, managing director of the talent and organisational portfolio at Accenture, is of the opinion that millennials are more au fait with technology and they are using it to enhance their efficiency and enable productivity (Burrows, 2013). "They are also better at collaboration than older colleagues and because they grew up using social networks, they naturally lean to online collaboration tools to solve problems and innovate" (Burrows, 2013). These individuals are looking at brands to inform, educate, inspire and involve them and as highlighted by Schwabel (2013), 63% of millennials globally stay updated on brands by means of social media, while 46% use social media when buying online. However, it is important to note that authenticity, transparency, and real-time engagement are key requirements for all brands communicating with millennials via social media platforms (Granese, 2013). This becomes apparent when one considers that up to 55% share bad experiences using social media.

The freedom that these individuals have to share bad experiences and communicate, in general, about an organisation and its brand online, means that it has become crucial for organisations to measure the influence that individuals have when using social media. As social media tools afford powers to the individual to generate content and communicate about an organisation and its brand on the web, it has created the need for the organisation to strategically manage the content loaded and shared on these platforms. As highlighted by Fournier and Avery (2010:30), many communication specialists are, for the most part, ill-prepared for this risk-centered role, as they "have little understanding of systematic or idiosyncratic risks concepts, or the ways chosen strategies exacerbate and control those risks". However, the management of the risk is crucial, as the "power of consumer collectives can invite unintended consequences", which can in turn tarnish an organisations' reputation (Fournier & Avery, 2010:12). This can be detrimental to the organisation, as reputation has become the single most valued organisational asset (Gibson, Congales & Castanon in Walker, 2010).

Reputation Management as organisational imperative

Reputation has become one of the key focus areas of Communication Management and Public Relations, since damage to an organisation's reputation has become a serious issue and is one of the key risks that executives are concerned about (Upson, 2010:87). Reputation, for the purposes of this landscape study, can be defined as the sum values that stakeholders attribute to an

organisation, based on the perception and interpretation of the image that the organisation communicates over time (Dalton, 2005). Furthermore, it refers to the trust, admiration, good feeling and overall esteem people have for an organisation (Reputation Institute, 2009). It refers to a long-term strategy for measuring, monitoring and managing an organisation's reputation as an asset. The importance of reputation receiving sufficient attention from the leaders within organisations is increasingly becoming important, as research shows that brand perception accounts for a large part of the 30-70% gap between the book value of most organisations and their market capitalisation (Upson, 2010:87). This is strengthened by research that illustrates that reputation could be a strategic resource for a company, affecting its financial performance (Deephouse, 2002; Heil, 2010). The relevance of this statement becomes apparent when studies such as the PricewaterhouseCoopers: Emerging Trends and Strategic Issues in South African Insurance report of 2008 is taken into consideration. This study indicated that the CEOs of a number of insurance companies ranked reputation as one of the most important measures of success.

Klein (1999:335) argues that the current business environment, with stakeholders having increased connection with brands afforded by participative web technologies, has profound implications for brand reputation. Consumers are entangled with the culture and identities of the brands they support and feel complicit in the brand's behaviour (Klein, 1999:335). This has forced communication and public relations specialists to seek strategies aimed at collaborating and positively leveraging the influence of web 2.0 technology and to devise new communication strategies aimed at brand protection rather than brand building. This has given way to a new paradigm that is referred to as 'brand stewardship' and alludes to the fact that the power no longer lays with the brand owners but the public, that has been empowered due to the rise of web 2.0 technology. The increase in reputational risk has resulted in various online reputational management tools and monitoring systems and, in turn, this has resulted into an environment where the ability to discern brand risk potential has become a valued ability (Upson, 2010: 87).

Opportunities

Results of a very recent study conducted by the University of Johannesburg amongst PRISA accredited PR and Communication Agencies during July 2014, provide interesting insights into how the industry itself views the drivers and trends impacting on the industry. The survey, which was completed by executives with post graduate education and more than 10 years of experience in the industry and who have been in their current role for at least five years, shared their views with regard to the importance of a number of drivers and trends and the degree to which they think these impact on the industry. The results from the study indicate that the top three drivers of change in the industry is open source branding, stakeholder trust issues and client trust issues. The top three trends impacting on the industry are perceived to be loss of trust, loss of institutional power and disintermediation of agency influence. The most important impact of these trends on the industry has been eradication of junior levels in agencies (junior account executive levels), new industry titles and roles and increased competition from new start-ups.
Given these challenges, it is clear that the industry will have to capitalise on the opportunities that change can bring. It is also abundantly clear that the role of the communication and public relations agency is undergoing a process of major change that requires a rethink of communication and public relations business models. One of the first opportunities for the PR and Communication Agencies is to "fix PR's broken business models" (Middleton, 2012:8).

Rethinking PR and Communication Business Models

The loss of trust amongst clients and stakeholders can partly be attributed to the business models employed by PR and Communication agencies. Many agencies function in a manner where they merely carry out client commissions and instructions, charge by the hour, and avoid risk for themselves by minimising their own accountability. The practice of handing over accounts to juniors to manage once the account has been won, also does not contribute to developing the kind of strategic partnership where there is mutual accountability for the client's brand. Furthermore, the industry has been guilty of lack of strategic counsel, poor quality service, the use of middlemen and overpricing. This has resulted in loss of trust between agencies and clients. The challenge for agencies is to add strategic value and measurable return on investment for the client by hiring the very best talent that understand the industry and incentivising them to deliver value for the client.

Middleton (2012:8) summarises this as follows:
'the value we deliver, in other words lies largely in our ability to act as trusted partners in deep collaboration, not merely to carry out client commissions and instructions'.

Provide measurable Return on Investment

The PR industry has been put under increasing pressure to provide clients with real returns – not just in terms of coverage, but also in terms of impact. It would appear that the successful agencies are those where PR and Communication practitioners are using sound metrics to measure their impact. Schroeder-McLean (2012:10) suggests that clients increasingly demand evidence-based returns on their PR and communication spend, and PR and Communication practitioners find themselves without appropriate measurement techniques that validate the impact of their work at the bottom line. In South Africa the practice of applying AVEs is still prevalent, because practitioners assert that it is the easiest way to arrive at a quantitative measure. While the Barcelona Declaration has resulted in consensus on the need to measure impact, no clear guidelines have been provided. The opportunity for the industry lies in collaborating to develop outcomes-based measures that indicate how PR and Communication drives business performance. The PRSA 2 Measurement Working Group is one of the industry initiatives to address the provision of relevant analytics and analysis of audience research methods.

Creative co-creation and stakeholder engagement

With declining audiences for traditional media, emergence of new media platforms and technologies and the resulting democratisation of media access, new possibilities for stakeholder engagement and co-creation have emerged. Communication convergence is challenging traditional PR, which relied for most part, on paid for time and space media. This means that the focus of agencies is now to employ earned media specialists, as this kind of media creates an opportunity for organisations to get exposure and free publicity. Earned media is usually more trusted, while positive 'word of mouse' enhances reputation and relationships, but it is also the most difficult to attain. It has become imperative for communication and public relations agencies to manage the earned media space strategically, and change or adapt organisational structures to enable social media management and the inclusion of this new communication tool to the organisation's mix of communication tools.

Earned media feeds directly from both owned and bought media, and the relevance of managing earned media in an integrated and strategic manner in the current communication environment, is gaining significant importance. The successful PR and communication professional will create brand stories that resonate on multiple platforms, and create multiple brand touch points. The challenge in content economy is to maintain consistency of voice across these platforms, while still maintaining seamless integration between organic and paid-for content. In the content economy it is imperative to select content based on metrics. Data-driven decisions will impact on both relevance and return on investment. Online communication platforms pose an opportunity to adopt new platforms and for the personalisation of message content. South Africa's diverse demography may pose challenges for navigating fragmented stakeholder audiences, but it opens up many more opportunities to build more personalised and meaningful relationships.

Increased industry collaboration

There are numerous opportunities for better collaboration between industry partners, and energy should be devoted to developing new collaborations, or sustaining and strengthening pe-existing relationships. Better data (especially digital data) is one area where collaboration can contribute significantly to industry growth. Collaboration in generating globally benchmarked industry reports can assist with finding workable solutions to complex industry problems. One example where collaboration has paid off for the industry is the incorporation of an internet planning tool into Telmar, and the inclusion of Effective Measure digital data weighted to the All Media Products Survey (AMPS).

Increased collaboration with Higher Education Institutions

The industry is desperate for strategic thinking and digital skills. Instead of recruiting these skills outside of traditional skills bases, closer co-operation with Higher Education Institutions could ensure greater relevance of education and skills for the industry. An area where collaboration does take place, is on the level of the Global Alliance. Several academics and practitioners are involved in international benchmarking and are developing the body of knowledge for PR and Communication, both locally and internationally. Involvement and participation of academics, industry professionals and students in collaborative service learning experiences will not only strengthen the profession, but also provide the opportunity to students to interact and engage with authentic and ethical role models. Industry leaders can also become involved in the education and training of future professionals by serving on academic advisory committees, offering internships and work-integrated learning opportunities. In turn, academics can contribute to the continuous professional development of industry professionals by providing workshops and training opportunities. Academics should also contribute their research skills in finding a solutions based-approach to industry challenges, and building a body of both theoretical and applied knowledge that industry practitioners can draw on.

(Re)-establish stakeholders' trust through good governance

In a hyper-connected world, the trend is increasingly toward hyper transparent communication. Stakeholders have more power than ever before for posing reputational risks to brands, and threatening brand value that may have taken years to attain. Digital influencers have grown 30-fold in less than two years, and PR and Communication practitioners must find ways to deal with this

ever expanding "universe of influencers and massive volume of social media conversations and brand mentions" (Galbraith, 2012:5). Research findings suggest that stakeholder relationship management in South Africa is practised reactively, pro-actively and interactively (Meintjes, 2013:8). A brand can create value by engaging interactively with its stakeholders. Interactive involvement refers to ongoing engagement with a view to building relational or social capital amongst stakeholder groupings. A focus on sustainability impacts positively on both risk navigation and corporate strategy. More recently, the King III Report has given South African companies guidelines and frameworks for greater accountability in financial, social and environmental issues and reporting. Greater emphasis on sustainability will also ensure greater accountability in reporting. This entails a radical shift away from traditional PR and Communication approaches, where practitioners were advised to act in the interest of the client's reputation by not divulging information. Rapid and ongoing expansion of technology empowers online stakeholders to be direct and transparent in their engagement. Therefore practitioners must be where the conversations take place, and there may be an increasing need for PR and Communication practitioners to engage in courageous conversations and interpretation of information.

Ensure ethical practice in emerging markets

South Africa has roots in the developed world, but decades of global growth has resulted in broad representation in global markets such as the rest of Africa, Brazil, Russia, India and increasingly the countries of the Muslim world. Global growth has led to the rising incidence of practice in emerging PR and communication contexts, which may pose risks to ethical standards of practice that are revered in the Western world. The growth of public relations in the emerging markets should be underpinned by ethical practice as the preferred position, regardless of any external pressures that may exist. As these economies grow stronger and political processes are increasingly democratised, the need will be greater for ethical dealing and truthful communication.

Co-opting with (global) competitors

Because the South African PR and Communication industry competes in the global market space, the successful competitors appear to be those that can offer local insights that international industry players find difficult to compete with. These are the agencies that deliver world class service with a sound understanding of the local context, which gives them a competitive advantage over big international competitors. Local media spend is also beneficial to the economy, boosting job opportunities across the various industry sectors, and contributing to the GDP. Successful local agencies also increasingly have the opportunity to affiliate with global PR networks, and to draw on their world class skills and experience in all market sectors. The industry is also seeing many entrepreneurs entering the market rapidly with new products and services on affordable computing platforms that hold potential for those in the industry agile enough to drive digital thinking throughout every aspect of their business.

The opportunities for PR and Communication in South Africa is perhaps best summarised by Hayes (2012:4):

 "Public Relations has enormous opportunities due to the internationalisation of the practice, more public policy work, a bigger role for business in society, new media and more complex issues requiring collaborative solutions and perhaps above all more empowered stakeholders. However,

despite these opportunities a relatively poor reputation and skills gap   especially in emerging countries will only widen the credibility gap unless education and training managers keep up".

Capabilities

A recent longitudinal study undertaken within the Department of Strategic Communication (2011-2014) at the University of Johannesburg has been investigating the various trends that are currently impacting the communication industry. The results of this study also highlight the skills and experience needed by communication and public relations specialists to survive successfully within the current business environment. This is a longitudinal study (2012-2014) of the top ten communication agencies and the brands serviced by these agencies, as identified by an independent industry journal. As depicted in figure 1, the findings show that the main trend impacting on the current practice of communication is a shift towards mobile technology. The adoption of mobile technology and the impact thereof has meant that the communication and/or the public relations specialist require new skills in order to deal with this trend.
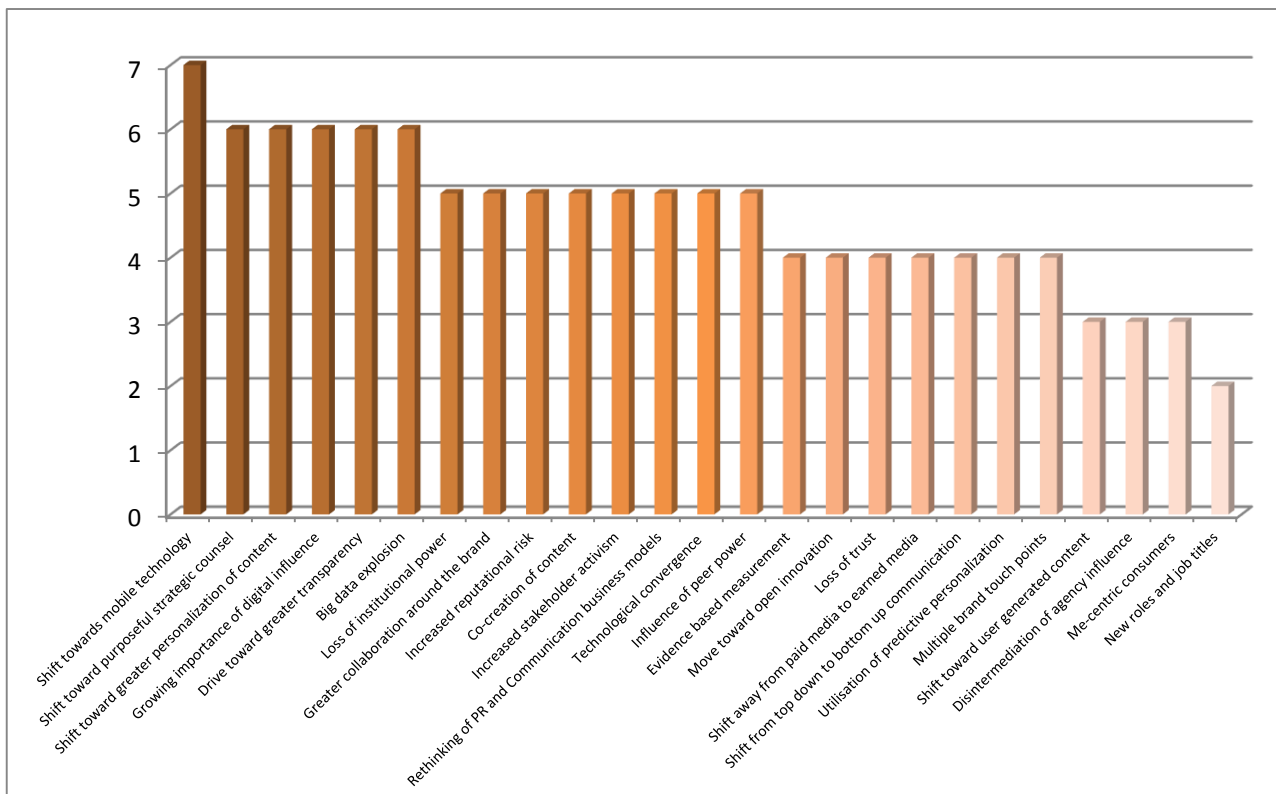
Figure 6: Trends impacting on the practice
A second major trend identified during the research was that the role of the communication agency is shifting towards that of a purposeful strategic counsel.

Purposeful strategic counsel

The field of Communication Management and Public Relations is rapidly changing and demands a more innovative and creative approach. As emphasized by Malherbe (2011:18), consumers of today want to be engaged on a level that is meaningful to them. Communication and public relations agencies are under pressure to deliver results that deliver a return on investment and make a meaningful contribution to the business. These agencies are no longer required to just

ensure that strategies and campaigns are developed and rolled out, but agencies are increasingly required to offer a strategic partnership which completely understands the business and offers strategic guidance throughout the process.

Business unusual

In the light of the aforementioned, the role of the communication and also public relations agency is undergoing a process of major change that requires a rethink of communication and public relations business models. The traditional role of the agency is changing and the development and rolling out of communication strategies for clients is quickly becoming something of the past. The current environment is characterised by volatility, uncertainty and complexity and filled with ambiguity (VUCA), and these characteristics are all very indicative of the post-modern communication environment in which organisations currently function. The VUCA environment has now transformed into a context where client systems have to assume greater accountability for strategic work to ensure their own sustainability. This now means that clients have to bring in the strategy know-how and expertise, which in many instances was situated within the agency. Organisations are now increasingly taking the responsibility for the strategic and technical roles and leaving communication agencies to deal with the operational and execution components of their strategy. As explained by Rooney (2013), brands are at an advantage when managing their own communication strategies:
 "We have greater control over the creative process; speed is certainly an issue we find we can get things to market much, much faster with a high degree of control. We have people here who understand the business and the industry. At agencies, you have the revolving-door syndrome. We have a lot more stability here. Plus, people understand the industry and culture. There is tremendous cost savings and also we are able to attract and retain solid talent because Fidelity has a lot to offer in terms of benefits, stability. Those would be main reasons, and then maybe an additional reason might be tighter integration with our data and analytics team. We have teams of analysts who work closely with our creative teams also."

In light of this statement by Rooney (2013), there is a growing tendency that agencies will not be able to fulfill the strategic and tactical roles for clients any longer, and may have to focus on shorter term and lower margin assignments. This has all resulted in an environment that is characterised by communication and public relations agencies that are not doing what they did before, and ultimately suffer of what is called disintermediation of their power.

Disintermediation of agency power

The agency functioning in the current post-modern communication environment is characterized by disintermediation of agency power. Disintermediation indicates the removal from a supply chain or the cutting out of the middleman. It refers to the fact that organizations are now able to deal with their various stakeholders directly via the Internet. This means that organizations can no longer control what people think, whether through its agents, intermediaries or the media itself. The disintermediation of agency power is largely due to the fact that the web 2.0 technology environment has brought about what is referred to as an open source communication environment. This has allowed organizations to tap into the power of social media and the advantages it offers in terms of crowdsourcing. This means that the control does not reside with the brand or organization, but rather with stakeholder of the brand that interacts on these various social media platforms.

Given the aforementioned, it has become imperative for agencies to develop key skills and capabilities with regard to the management of the environment that has been brought about by the use of social media by consumers and stakeholders. Agencies therefore had to review the type of people employed by them, with a shift taking place towards the employment of content specialists, creative technologists and social media specialists rather than pure strategists.

The concept of brand stewardship

The use of social media by organizations has resulted in an environment where communication professionals have had to develop and assume new roles in order to manage brand reputations in the online spaces where brands have become communication platforms. Due to the power that consumers now have over organizations and their brands, organizations are increasingly not in control of the messages sent out about their brands (Berthon, Pitt & Campbell, 2008). Brands are no longer solely built by the communication team or brand owners but by different stakeholders, as brands are now rather connected in an exciting conversation through social networks where stakeholders group themselves and make their voices heard when they love or hate a brand. This has created an environment where communication management is shifting from communication that is focused on building the brand, to risk management as a defense. This has given way to a new paradigm, which is referred to as brand stewardship. Brand stewardship alludes to the fact that the power no longer lies with the brand owners, but the customers who have been empowered due to the rise of web 2.0 technologies. Klein (1999: 335) argues that this increased connection with brands afforded by participative web technologies has profound implications for brand reputation, as consumers are entangled with the culture and identities of the organizations and it has become imperative for these organizations to develop measurement metrics to effectively manage this environment.

Measurement metrics

The utilisation of monitoring tools by both communication agencies and brands within the South African context has become one of the crucial business activities needed for survival. Evidence-based measurement is currently a key capability that agencies need to include in their value offering to clients. As emphasised by Munslow (2010:30), measurement is about proving that real results were obtained. There is a growing fundamental mindshift that underlines the importance of measuring the impact and not the output of communication. As highlighted by Berkman (2013:18), the absence of appropriate measuring metrics within the field of Public Relations is a major issue. However, there is a growing awareness of the fact that no one-size-fits-all approach can be used, as the nature of the brand and the organisation determines the approach needed. This has meant that many communication agencies have had to review their approach to the measurement of communication and public relations activities and ensure that the relevant skill and technology are acquired within the agency.

Resources for the Profession

Professional Associations and Commercial firms

There are a number of industry associations, commercial firms and professional associations representing public relations and the marketing profession of South Africa. The most important and prominent of these, according to The Annual 2010/2011 and 2013/14, are listed below:

- The Public Relations Institute of Southern Africa PRISA: PRISA is the founding member of the Global Alliance for Public Relations & Communication Management. The key focus areas include the promotion of professional credentials and recognition of accreditation, ethical practice, the link between sustainable development and public relations and communication, and the encouragement of creativity and innovation. PRISA has various levels of membership and the 2014 membership is as follows:
    - 780 senior practitioner members
    - 90 accredited Public Relation practitioners (APR)
    - 1740 student members
  - Website: www.prisa.co.za
- Council for Communication Management (CCM): CMM is an association of professional organisations representing the interests of the communication profession in South Africa. CMM is a basis for collaboration, with the goal to strengthen and position the communication industry as a united profession.
  - Website: www.prisa.co.za
- The Mobile Marketing Association (MMA): MMA South Africa forms part of the global non-profit trade association that represents all the players within the mobile marketing value chain. MMA SA is active in the promotion, establishment and growth of the mobile marketing and advertising industry in South Africa.
  - Website: www.mmasa.org
- Advertising Media Association of South Africa (AMASA): A non-profit organisation established in 1971, the main goal of AMASA is educating people who are interested in the media, marketing and advertising industry. AMSA accredits the AAA School of Advertising, which focuses on training aspiring young professionals in marketing, advertising and media.
  - Website: www.amasa.org.za
- Audit Bureau of Circulations (ABC): A non-profit organisation based on a bipartite agreement between advertiser and advertising agencies and media owners, providing accurate and comparable circulation data of advertising and promotional material for buyers (advertisers and marketers) and sellers (media owners).
  - Website: www.abc.org.za
- Association for Communication and Advertising (ACA): The ACA is the industry body of the advertising and communication sector, representing approximately 100 advertising and communications agencies in South Africa. The ACA is active in all areas of the industry, including education, transformation and setting of standards and ethics
  - Website: www.acasa.co.za
- Advertising Standards Authority of South Africa (ASA): The ASA is an independent body set up by the marketing communication industry to ensure that its system of self-regulation works in the public interest. It stays close to public sentiment, and enforces a Code of Advertising Practice in an objective and unbiased manner. ASA provides the basis for arbitration for disagreements within the industry or between advertisers and consumers.
  - Website: www.asasa.org.za

- Creative Circle: The Creative Circle and its member agencies are committed to developing and improving the South African advertising industry's creative product.
  - Website: www.creativecircle.co.za
- Chief Marketing Officer (CMO) Council- the CMO Council is the only global network of executives specifically dedicated to high-level knowledge exchange, thought leadership and personal relationship-building among senior corporate marketing leaders and brand decision makers across a wide range of industries.
  - Website: www.cmocouncil.org
- Institute of Marketing Management: It offers various undergraduate and post graduate programs in marketing, advertising and public relations.
  - Website: www.imm.co.za
- Print and Digital Media South Africa (PDMSA): Print Media SA was formed in 1996 to represent, promote, express, interact and intervene in all matters concerning the print media industry, representing over 700 newspapers and magazine titles. The body has now taken into account the shift in journalism to include the digital age and changed the name to PDMSA.
  - Website: www.pdmedia.org.za
- The Direct Marketing association of Southern Africa (DMASA): The DMASA is a proactive, non-profit organisation dedicated to protecting and growing the DM industry through participation in all legislation affecting practitioners and consumers alike.
  - Website: www.dmasa.org.co.za
- South African Research Foundation (SAARF): SAARF commissions and manages media audience and product/brand research for the marketing, media and advertising community. It provides data about the use of mass media, and about the consumption of products, services and brands by users of mass media.
  - Website: www.saarf.co.za
- Advertising Media Forum (AMF): AMF is associated with ACA and is a collective of the media agencies and individuals including consultants, strategists, planners and buyers. The goal of AMF is to create channels for communication and encourage and support transparent policies, strategies and transactions.
  - Website: www.amf.org.za
- The commercial Producers Association of South Africa (CPA): The CPA is the professional trade association of companies specialising in the production of television commercials for both South Africa and International markets, advising on all industry issues.
  - Website: www.dmasa.org
- Digital Media & Marketing Association (DM&MA): The DM&MA is an independent, voluntary, non-profit association focused on growing and sustaining a vibrant and profitable digital industry within South Africa. The DM&MA represents over 200 members including local online publishers, bloggers, creative, digital and media agencies.
  - Website: www.dmma.co.za
- Marketing Association of South Africa (MASA): The MASA represents the interests of corporate and individual marketers. The body upholds enhanced standards and mentors and supports Marketing practitioners.
  - Website: www.marketingsa.co.za
- National Association of Broadcasters (NAB): The NAB is a non-profit, independent industry association funded by membership across public, community and commercial broadcasting. It promotes the interests of the broadcasters, enabling sustainable and robust growth and development of the industry.
  - Website: www.nab.org.za

- o Radio Advertising Bureau (RAB): The RAB is a non-profit organisation funded entirely by its member radio stations to guide marketers/advertisers, creative and media agencies towards a more effective and creative use of the medium.
  - o Website: www.rab.co.za
- o Southern African Marketing Research Association (SAMRA): Founded in 1963, SAMRA is the professional association of marketing research, social research and opinion polling research organisations and practitioners in Southern Africa.
  - o Website: www.samra.co.za
- o Advertising Benevolent Fund (ABF): A 44-year old charitable fund, ABF is the vital crisis support structure behind advertising, marketing and media industries in South Africa. It takes care of people who have served in these sectors but who have found themselves redundant, retrenched, injured or ill. It is funded through membership fees and high calibre events that are hosted throughout South Africa.
  - o Website: www.abf.co.za
- o Out of Home Media South Africa (OHMSA): OHMSA is the officially recognised trade association for the out-of-home media industry in this country. Its members provide media platforms across the entire spectrum of out-of-home, from alternative or ambient media to airport advertising, brand activation and giant billboards.
  - o Website: www.ohmsa.co.za
- o PRINTING SA: PRINTING SA is a brand of PIFSA NPC, which is a trade organisation recognised as the official mouthpiece of the industry. Their vision is to assist the printing and packaging industries to be globally competitive and socially responsible.
  - o Website: www.pifsa.org

International Professional Bodies

In addition to the associations listed above, there are a number of international professional bodies and associations that professionals in the industry can choose to subscribe to, such as:
- o Charted Institute of Public Relations (CIPR)
- o Public Relations Consultants Association (PRCA)
- o International Public Relations Association (IPRA)
- o International Association of Business Communication (IABC)
- o Global Alliance for Public Relations and Communication Management

Academic Institutions

Public Relations Qualifications offered in South Africa

Institution	Course Offered	Degree/ Diploma
University of Johannesburg	National Diploma in Marketing	Diploma
	Public Relations and Communication	Diploma
	BA Strategic Communication (Marketing and Corporate Communication)	Degree
	Honours in Strategic Communication	Degree
		Degree

	Masters in Strategic Communication Doctorate in Strategic Communication	Degree
Midrand Graduate Institute	BA Public Relations	Degree
Varsity College	Diploma in Public Relations Diploma in Commerce in Marketing Management BA Corporate Communication	Diploma Diploma Degree
Cape Peninsula University of Technology	Public Relations Management	National Diploma
Red and Yellow	Marketing and Communication	Diploma
University of Pretoria	BCom Communication Management	Degree
Nelson Mandela Metropolitan University	National Diploma in Public Relations Management B Tech Public Relations Management BA Honours in Corporate Communication	Diploma Degree Degree
UNISA	National Diploma in Public Relations Management Honours Masters Doctorate	Diploma Degree Degree Degree
Vega	BA Creative Brand Communications Bachelor of Business Administration in Brand Building and Management BA Honours in Brand Leadership Advanced Diploma in Brand Innovation MA Creative Brand Leadership	Degree Degree Degree Diploma Degree
AAA School of Advertising	BA Creative Brand Communication BA Marketing Communication Diploma in Marketing Communication	Degree Degree Diploma
Damelin	Damelin Correspondence Course Public Relations	Diploma
North West University	BA Communication Studies	Degree

University of Free State	BA Communication Science specialising in Corporate or Marketing Communication	Degree

Research

There is general concern that there is not enough independent research available to assist the profession, especially planners and strategists. The South African media research landscape has been plagued by controversy. This has been further fuelled by an acrimonious split between the South African Research Foundation (SAARF) and the National Association of Broadcasters (NAB). While the split resulted from a disagreement about representation on the board of SAARF, NAB members had not been satisfied with the way in which SAARF conducts its research in terms of the dated methodologies used to measure the All Media and Products Survey (Amps), as well as the Radio Audience Measurement Survey (Rams) and the Television Audience Survey (Tams), and the fact that these measures do not reflect changes in audience consumption patterns (Meletakos, 2014:42). As a result, many media owners conduct their own research. There is, however, concern that this type of research often quantifies usage instead of providing insights into how consumers consume media. This type of research may therefore be biased in favour of media owners. Consequently, there is a need for one independent source that can provide accurate measures of return on investment, so as to ensure greater accountability for clients. The increase in digital channels and social media platforms has also resulted in a greater need to establish a central survey for each media type, in which each media type organises its own research to generate industry-specific data. This would include Tams (television), Rams (radio) and Pams (print), Dams (digital) and Ohms (outdoor). At present very little data is available on digital, but these metrics have now been weighted into Amps. The independent market research company Ask Africa recently released the Digital Barometer, in collaboration with World Wide Worx, that provides insights into digital literacy and consumption in South Africa. This means that traditional PR agencies can access reliable digital data to optimise strategies and campaigns, and that this is no longer the sole domain of specialised digital agencies. Big data is also fast becoming the new currency within the profession, and the ability to reduce vast amounts of information into insights is a major challenge. However, most traditional agencies still plan campaigns in silos, because they do not know how to measure return on investment for digital data, since they are accustomed to measure this in terms of reach and frequency. (Meletakos, 2014:44). One of the biggest challenges remains finding a research data source that "evaluates each medium for the true value it offers clients, and not in isolation of the big picture." (Meletakos, 2014:40).

Aside from the recognised industry research indexes, there are a number of other resources available to PR and Communication practitioners such as industry websites, social media groups and publications. These include:
- The Media online: www.themediaonline.co.za
- AdFocus: www.adfocus.co.za
- AdReview: www.tonykoenderman.com
- Marketing Update: www.marketingupdate.co.za
- Saarf: www.saarf.co.za
- Bizcommunity: www.bizcommunity.com
- Trendwatching: www.trendwatching.com
- Happy Spotting: www.happyspotting.com
- Brand Channel: www.brandchannel.com

- Warc: www.warc.com
- The Red Zone: www.theredzone.co.za
- Melcrum: www.melcrum.com
- Reputation Institute: www.reputationinstitute.com
- RAB: www.rab.co.za
- The Marketing Site: www.themarketingsite.com
- Adforum: www.adforum.com
- Platform Magazine: www.platformmagazine.org
- PR News: www.prnewsonline.com
- PR Coach: www.theprcoach.com
- PR Week: www.prweek.com/uk
- PR Daily: www.prdaily.com
- Global Alliance: www.globalalliancepr.org
- PR Newswire: www.prnewswire.co.uk
- The Stockholm Accords: www.stockholmaccords.org

In addition, there are a number of industry-related groups on LinkedIn where articles are published, such as:
- Public Relations and Communication Professionals
- Strategic Communications: PR & MKT
- Consumer Insights Interest
- PR Professionals
- Communication Professionals
- Marketing and Communications Forum

The following industry publications publish articles regarding the current trends, projects, relevant news and the state of the industry:
- The Annual: The Annual 2013/14 is the 7th edition of this publication. It is a popular source of brand communication mainly consisting of comprehensive agency and brand profiles.
- The Media: The Media is a monthly publication aimed at the media and/or channel planning industry and publishes articles by industry specialists on current trends, agency projects and brands.
- AdFocus: AdFocus is an annual publication with a focus on the holistic brand communication industry. The articles published are from the industry, agency specialists and include discussions of brand communication campaigns.
- AdReview: Having been published for 11 years, AdReview is an annual publication that provides a snapshot of the state of the Public Relation and Communication industry. Its main focus is to provide information that helps marketers make decision in choosing/looking for advertising or Public Relations agencies.

According to *Communika* (2013, 5) involvement in research projects from students and academics in the industry plays an important role in strengthening the profession. In addition, it helps future practitioners form an understanding of the importance of research in terms of finding suitable answers and applying them to issues in the communication profession both globally and locally. The academic research focus within higher education institutions that is relevant to the industry (public relations and communication management) is as follows (*Communika*, 2013:5):

Public Higher Education Institutions	Research Focus	Contact Person

Durban University of Technology	HIV and Aids in developing contexts, corporate social investment, work integrated learning	Prof Renitha Rampersad renithar@dut.ac.za
University of Johannesburg	Strategic communication, social media and ethics, relational approaches, youth and millennials, innovative approaches to teaching and learning strategic communication, social systems (second-order cybernetics), stakeholder engagements, social organisations	Prof Sonja Verwey sverwey@uj.ac.za
UNISA	PR and relationship building, social media, economic growth of African cities, media, Q-methodology, global media concentration, stakeholder perceptions of academic institutions	Prof Danie du Plessis Dplesdf@unisa.ac.za
University of Pretoria	Stakeholder relationships, government communication, the emergence of risk communication in the business environment, corporate governance, reputation management, emerging trends in public relations practice in Africa	Prof Ronel Rensburg Ronel.Rensburg@up.ac.za
University of Free Sate	Research interest and projects include a wide variety of specialisation areas such as persuasion, political, health, development, brand, digital integrated and strategic communication, leadership, reputation and change management	Dalme Mulder mulderd@ufs.ac.za
Tshwane University of Technology	Reputation management and measurement	Prof De la Rey van der Walt VanderWaldt@tut.ac.za

Furthermore, the Nexus Database System provides access to a database of South African theses and dissertations. The academic research projects relevant to the Public Relations and Communication Industry all demonstrate a shift to strategic communication. Based on the Nexus search, these areas of focus include change management and communication, the credibility of electronic word-of-mouth, network management and community networks, stakeholder management and stakeholder engagement, the role of social media in the communication industry,

digital risk and reputation management, a strategic approach to managing stakeholder relationships, leadership, corporate governance and corporate sustainability and a strategic communication approach to communication management.

Moreover, the following Communication/ Communication Management/ PR/ Marketing Communication academic journals, where both theoretical and applied research findings can be accessed, are published by various academic departments situated within universities within South Africa, and are available to practitioners through subscription:

- Communicare
- Communitas
- Communicatio

Commercial Firms

The Annual Top Agencies 2011/12, 2012/13 and 2013/14

> *Note the bolded text represents the agencies listed specifically in The Annual **2013/14**

	Full Service, specialist and digital
	Agency
1.	7 Dffrnt Knds of Smke
2.	34
3.	Actuate
4.	Amorphous New Media
5.	Agile
6.	Aqua
7.	Arctic Circle
8.	Avatar
9.	Berge Farrell
10.	Black Africa
11.	Black River F.C.
12.	Blast Brand Catalysts
13.	Bletchley Park
14.	Blue Moon
15.	Boomtown Strategic Brand Agency
16.	Brainstorm Mobile Solutions
17.	Brand Inc
18.	The Brand Union
19.	By Design
20.	Chillibush
21.	The Creative Counsel
22.	Creative Spark
23.	Creative Chapel Advertising
24.	Cross Colours Consultancy
25.	The Collective
26.	DaVinciEdisonBell
27.	Daniel & Mckay

28.	DDB South Africa
29.	Draftfcb
30.	Demographica
31.	Dojo115
32.	EuroRSCG Worldwide Southern Africa
33.	Etiket
34.	Ebony + Ivory
35.	Eventworx
36.	The Event Production Company
37.	Fishgate Advertising
38.	FGX Studios
39.	Four Pin Plug
40.	The Flagship
41.	Forebrands
42.	FoxP2
43.	Gendel Strategic Marketing Group
44.	Geometry Global (O&M SA)
45.	Go Advertising (O&M SA)
46.	Gloo Digital Design
47.	Grid Worldwide Branding & Design
48.	Grey SA
49.	Halo
50.	Hamiltons
51.	Haas Advertising
52.	Havas Southern Africa
53.	The Hardy Boys
54.	HDI Youth Marketeers
55.	House of Brave
56.	HKLM
57.	Human.kind Advertising
58.	Interbrand Sampson
59.	Ireland/Davenport
60.	Joe Public
61.	Joe Public Ignite
62.	Joe Public (n)
63.	Joe Public Shift
64.	Just Design
65.	The Jupiter Drawing Room Cape Town
66.	The Jupiter Drawing Room JHB
67.	JWT South Africa
68.	King James Group
69.	Utopia
70.	LKDA Strategic Creative Advertising
71.	Lighthouse Digital
72.	Lowe and Partners
73.	M&C Saatchi Abel
74.	M&C Saatchi Africa
75.	Machine

76.	McEwan
77.	Mann Made Media
78.	McCann
79.	MediaCom
80.	The MediaShop
81.	MetropolitanRepublic
82.	Mobitainment
83.	Mojo Mother Russia
84.	Mortimer Harvey
85.	Mindshare
86.	Offlimit Communications
87.	Native VML
88.	Net#work BBDO
89.	140 BBDO (Cape Town)
90.	NXT\ Digital Innovation
91.	Nintey9cents
92.	Neo@Ogilvy
93.	Ogilvy & Mather South Africa (Cape Town)
94.	Ogilvy & Mather South Africa (Johannesburg)
95.	Ogilvy & Mather South Africa (Durban)
96.	Ogilvy HealthWorld (O&M SA)
97.	OgilvyEarth (O&M SA)
98.	Strike Media (O&M SA)
99.	Zoom Advertising (O&M SA)
100.	Old Friends and young talent (aka Ofyt)
101.	OMD
102.	Owen Kessel
103.	Olive Communication Group
104.	Oxygen8
105.	OZ Healthcare Communications
106.	Posterscope South Africa
107.	PenQuin
108.	Prezence Digital
109.	Rogue
110.	RMS Media
111.	Search Online Consulting
112.	Saatchi & Saatchi
113.	Space
114.	Stimulii
115.	Straight Twisted Advertising
116.	Switch
117.	Student Village
118.	Synchronised Marketing and Event Agency
119.	Quirk
120.	TBWA\Hunt\Lascaris
121.	TBWA\South Africa Group
122.	TMARC
123.	That's It Communications

124.	Tribalfish
125.	Trinergy Brand Connectors
126.	Trinitas
127.	Two Tone Global
128.	Troika Imagineering Works
129.	The Tuchshop Brand
130.	Wetpaint Advertising
131.	Velvet
132.	Virtuosa
133.	Volcano
134.	VWV Group
135.	W5 Partners
136.	Waggener Edstrom (WE)
137.	Yellowwood Future Architects
138.	Zanusi
139.	The Zinto Activation Group
140.	Y&R South Africa

	Public Relations
	Agency
1.	Livewired PR
2.	Ogilvy Public Relations (O&M SA)
3.	Meropa Communications
4.	Magna Carta Public Relations
5.	Opportun(at)e
6.	Owlhurst
7.	Watt Communication
8.	Fleischman-Hillard South Africa

* Note that The Annual lists the following as separate Public Relations agencies

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Contact information

The Global Alliance is always interested in cooperating with local institutions and associations to provide profiles of the social, economic and media context of member countries, along with details on the local public relations industry, its main activities and tips on successful local practice.

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