Measures by the South African integrated marketing communications and design industry (IMCD) in response to the COVID-19 pandemic

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Declaration

I, the undersigned, declare that the dissertation hereby submitted to the Tshwane University of Technology for the degree Master of Art and Design (Communication Design) is my original work with the exemption of citations from sources consulted, and which sources I have duly acknowledged utilising a comprehensive list of references. I also confirm that this body of work has not been submitted to any other university, either in part or in its entirety, to obtain a degree or any other qualification.

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I thank my parents for being amazing. Dad, I know you would be proud and I am sad you were taken too soon. Mom, for being a pillar and a true cheerleader. You badgered me until the end. And to my family, whose loyalty cannot be quantified.

Abstract

The COVID-19 pandemic resulted in a dramatic shift in how consumers spent their time and money, impacting where, when, and how goods and services would be provided in the future. This dramatic shift would affect how the Integrated Marketing Communications and Design (IMCD) industry would respond, considering its role in promoting economic recovery and growth after the pandemic.

The study focused on the South African IMCD industry and investigated areas affected by the pandemic and the industry's response to the pandemic. A qualitative, case-based approach, using semi-structured questions, identified and analysed the IMCDs' response and enabled inferred perspectives and recommendations. A thematic framework and interpretive approach guided the methodology.

The population comprised 45 organisations from the Association for Communication and Advertising in South Africa (ACA), with head offices in Johannesburg or Pretoria. Of the 45 organisations approached, 15 companies participated. Assistants contacted each member and conducted and recorded the interviews. A transcription was made of the recordings. Participants received copies of the transcriptions for validation. A manual analysis of the transcripts, assisted by ATLAS.ti, allowed for the collation and theming of the data. The study identified five areas impacted by the lockdown and five measures that members took in response to these impacts.

The IMCD industry was inadequately prepared for the pandemic, and management styles had to be re-evaluated by being more altruistic and acknowledging human capital's vital role in business sustainability. The IMCD also recognised the need for flexible, innovative, and honest leadership in its approach to clients, staff, and suppliers, as well as re-evaluating business offerings and employee skill sets.

Organisations in the IMCD industry with global networks benefitted through more collaboration and resource sharing across their international offices. Online and digitally orientated organisations before and during the pandemic performed better than IMCD organisations that relied on human contact with target markets such as eventing, hospitality, tourism, and beverages. The IMCD industry’s response was to become hybrid in their engagements with employees and externally with their clients, acknowledging the need to maintain agency culture by expecting staff to come into the office a few days a week whilst using the balance of the time to work from home. Accelerating to a deeper tech-integrated operational environment meant exploring existing software and using new digital tools to improve productivity and employee accountability.

The COVID-19 pandemic provided an opportunity for industry growth and the repositioning and retooling of methods, processes, and service offerings. Furthermore, the pandemic could be viewed as a litmus test for organisational sustainability, forcing organisations to close or adapt.

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Chapter 1. Introduction

1.1 Orientation

The first known cases of SARS-CoV-2, also known as COVID-19, reportedly originated in the Chinese city of Wuhan. The virus spread worldwide and is responsible for over seven million deaths, with more than 103,000 deaths occurring in South Africa by 24 April 2024 (World Health Organisation, 2024). On 23 March 2020, the South African State President declared a total lockdown, which came into effect on 26 March 2020.

The lockdown influenced people's purchasing behaviour since they were no longer able to go out and buy daily goods and food. The resulting impact of the pandemic shifted consumer habits from traditional to online stores (Boon, Yeo, Tan, & Wen, 2022). According to Arndt, Gabriel, Harris, Makrelov, Modise, Robinson, Simbanegavi, Van Deventer and Anderson (2020), by April 2020, certain industries were predicted to be more heavily impacted due to the lockdown. The prohibition of alcohol sales and its transportation would impact production, with only essential foods, hygiene products, and medical products continuing to trade. Furniture, clothing, and retail trade were suspended, while online trade in these segments remained active. The restrictions on restaurants, catering, and accommodation impacted tourism. The threat of infection meant consumers would be indoors more often, with increased online social behaviour, purchasing online, and embracing digital communication (Sheth, 2020). On 5 April 2022, the lockdown was officially lifted (South Africa, 2022a). Through this lockdown period, the Gross Domestic Product (GDP) of South Africa shrank from R1,148 billion in Quarter 1 of 2020 to R952 billion in Quarter 2 of 2020 (South Africa, 2022b). Pre-pandemic employment levels stood at 16,4 million, reaching a low of 14,1 million during the pandemic (South Africa, 2023), with approximately 70% of South Africans becoming unemployed during this period, attributing their job loss to either their workplace or business closing down or to a decrease in customers (South Africa, 2021).

The lockdown affected advertising expenditure, resulting in the cancellation or deferral of some activities by integrated marketing communication (IMC) companies. The cancellation in particular saw a decrease in advertising revenue for print media. The rise in digital media and the increase in the use of social media influencers further impacted traditional print media revenues. The lockdown saw more people spending time online, resulting in businesses shifting their focus to engaging customers digitally (Pandey, 2021) and using specialist digital agencies (Hu, Olivieri and Rialti, 2023). Kitchen and Tourky (2020) indicated that the lockdown heightened the challenges of deploying integrated marketing communication (IMC), stating that brands that succeeded during this period would understand the power of IMC. In a report, Wieser (2020) reiterates

that every brand should look for opportunities and question their competitive position assumptions. Brands would be forced to adapt and respond to the lockdown environment and the opportunities and threats that may present themselves. IMC has emerged as a fundamental element of achieving business success in the 21st century. However, it is encountering significant challenges, many of which existed before the upheaval caused by the COVID-19 pandemic lockdown. Nevertheless, the challenging circumstances of the COVID-19 pandemic lockdown era have heightened existing challenges in deploying IMC. Failure to robustly address these diverse and complex challenges could result in a regression to previous communication stages, potentially undoing the progress made in IMC development. There is also a pressing need to address the trend of neglecting post-sales issues and customer retention. Brands that successfully navigate and prosper in this challenging business environment are likely to fully understand the power of IMC, leaving no aspect of consumer attraction or customer retention to chance (Kitchen and Tourky, 2020).

The COVID-19 pandemic lockdown resulted in a significant disruption to consumer behaviour (what we buy and how often we buy it), and with time flexibility and location inflexibility due to being forced to work from home, consumers have learnt to improvise and innovate (where we shop, how we shop and why we shop). Work-life boundaries have been blurred, and new ways to consume and purchase products have been adopted. Old habits were expected to return post-pandemic, with new habits been formed (Sheth, 2020).[1] The post-pandemic environment has allowed corporations to self-transform and drive the digital transformation of work styles (Kodama, 2020).

The integrated marketing communications and design (IMCD) industry encompasses advertising, design, communications, and media management, employing a network of professionals from strategists, financial and business managers, production managers, art directors, designers, coders, and information technology experts. Duncan (2002) defines integrated marketing communications (IMC) as a strategic process for managing customer relationships to enhance brand value. It involves coordinating and influencing all messages across different functions to build and sustain profitable relationships with customers and stakeholders. Shimp (2000) states that IMC is an organization's cohesive and coordinated effort to promote a brand concept by leveraging multiple communication channels, delivering a clear, consistent, and compelling message in a unified voice.

As a business owner of an IMCD company for 17 years and a part-time lecturer, I am intrinsically and materially involved in the impact of the lockdown on my business and the industry at large. Through this study, I make recommendations that may be beneficial to design education and the IMCD industry, enabling exploration into curricular development. The

[1] Impact of COVID-19 on consumer behaviour: Will the old habits return or die?

study's potential can be extended based on the outcomes to identify impacts on designers, art directors, digital designers, and artists. The IMCD industry is expected to be agile and possess dynamic capabilities to respond to the lockdown (Tronvoll, Sklyar, Sörhammar, & Kowalkowski, 2020).

1.2 Problem statement and research question

The lockdown's impact resulted in a dramatic shift in how consumers spend their time and money, resulting in where, when, and how goods and services would be provided during the next normal.[2] There is a need to discover the impact the lockdown had on the IMCD industry in South Africa and the industry's response to the lockdown, especially as the IMCD industry has a vital marketing role in promoting economic recovery and growth after the pandemic.

This study addresses the following questions:

- Which areas in the IMCD industry were affected, and what was the impact of the COVID-19 pandemic lockdown on the industry?
- How did the IMCD industry respond to the impact of the COVID-19 pandemic lockdown?

1.3 Study aim and objectives

The study aimed to identify the measures the IMCD industry took in response to the lockdown.

The study had two objectives.

- Identify the areas in the South African IMCD industry affected by the COVID-19 pandemic lockdown to determine its impact
- Identify the measures the South African IMCD industry took to respond to the impact of the COVID-19 pandemic lockdown.

1.4 Beneficiation

The study's results could inform the South African IMCD industry as a collective, potentially culminating in the implementation of some key findings. The significance and benefit of the study beyond the IMCD industry could be expanded to the education and technology sector based on the studies potential outcomes.

1.5 Chapter outlines

The rest of the dissertation consists of the following chapters:

[2] McKinsey & Company: https://www.mckinsey.com/featured-insights/leadership/the-next-normal-arrives-trends-that-will-define-2021-and-beyond

Chapter 2: Literature review. This chapter reflects on the results of a pilot study presented at a Design Education Forum of South Africa (DEFSA) conference. The chapter furthermore reflects on issues reported in the literature relating to changes in consumer and buyer behaviour, human wellness, adaptation in technology during the lockdown, impact organisational operations, and business resilience.

Chapter 3: Chapter 3 is about the methodology and covers the research design, methodology, population and sample, quality of the data and data collection, ethical practices, and beneficiation.

Chapter 4: The results chapter reports on the areas in the South African IMCD industry affected by COVID-19, and the measures the IMCD industry took in response to the impact of the COVID-19 pandemic. The chapter also includes an interview with the chairperson of ACA.

Chapter 5: The last chapter provides the summary, the conclusions with recommendations.

Chapter 2. Literature review

2.1 Introduction

My study investigated the measures the South African IMCD took in response to the lockdown. The lockdown's impact on my IMCD business inspired me to pursue this study.[3]

A January 2021 pilot study (Kreusch, Schiller & de Lange 2021) investigated the impact of the lockdown on Ogilvy South Africa, a company in the IMCD industry. I interviewed a senior business partner, Nicole Dickens and used open-ended and probing questions regarding their company's response to the lockdown.

The pilot study highlighted several themes using a thematic framework and interpretive approach proposed by Attridge-Stirling (2001) and Yin (2018), which were used to guide the literature review. Furthermore, the pilot study encouraged the need for a more extensive study on the impacts of lockdown on the IMCD industry. The pilot study identified the following aspects: technological advances in business management, human resource management, home-work life, consumer and buyer behaviour, and digital and social media growth during the lockdown. The lockdown furthermore affected how they operated. The company would not return to its pre-pandemic work methods. The pilot study encountered a situation aptly termed the next normal.

During the literature review, I accessed the Tshwane University of Technology's Library and Information Services. In addition, I searched for information and references on networking sites (ResearchGate, Academia.edu, ScienceDirect) and search engines (Google and Google Scholar). I used the DEFSA pilot study (Kreusch et al., 2021) to inform the keywords during the search: COVID-19, consumer/buyer behaviour, employee well-being, technology, social media, business management and workplace productivity. I reviewed scholarly articles in published journals covering health, business management, information management, marketing, retail, and consumer services, as well as comments by industry leaders. The literature on the COVID-19 pandemic primarily featured health and wellness, focusing on policy, capacity building and governmental health responses. Articles also covered business resilience and impacts on education, marketing and sales, consumer and buyer behaviour, and technology. A gap existed around the lockdown's impact on the IMCD industry and the industry's response, especially within the South African context. There are six sections in Chapter 2, five of which deal with

[3] Vision IMC, an integrated marketing communications and design agency established in 2007.

literature that reports on the impact of the COVID-19 pandemic lockdown, with the last summarising and concluding the chapter.

2.2 Impact of the lockdown on the South African economy

The impact of the lockdown on the South African economy saw a decline in the purchasing of products and services and a shift in buyer behaviour. (McKinsey South Africa, 2021).[4] McKinsey (2021) identified five fundamental changes in consumer behaviour, predicting that these will have a long-term impact on the future.[5] These included a 45% shift in choosing which essentials South Africans buy and what value they offer to the consumer, a 90% flight to digital and online channels when purchasing products and services, and an 80% shift in brand or brand store loyalty. Together with this, 60% of consumers did not see themselves returning to their usual buying patterns after the pandemic, whilst, in 2021, 88% of South Africans wishing to keep or scale down their holiday expenses, indicating a strong desire to maintain their holiday culture. The impact of the lockdown on consumer and buyer behaviour resulted in reduced sales that invariably impacted how, when, and where brands were to be marketed[6]. McKinsey's (2021) briefing indicated that 80.6% of members within the industry responded with a "yes" when asked if the pandemic changed the relationships between marketers and agencies. The most significant change cited was remote working. The impact of the lockdown can be seen in several business areas, including how marketing budgets are spent, the type and nature of the communication, messaging, branding, and product development (McKinsey & Company, 2021). The most significant loss in communication channels was below-the-line spending at 26.6%, above-the-line spending at 18.8% digital media buying dropped by 3.7%. There was an increase of 1.9% in digital media creative and content. This drop in media buying will result in shrinking marketing spending and shifts in marketing communication strategy to digital media in 2021.

A study by Sheth (2020: 281) considered the impact of the lockdown on consumer behaviour and suggested the following eight universal trends: "hoarding, improvisation, pent-up demand, embracing digital technology, store comes home, blurring of work-life boundaries, reunions with friends and family and discovery of talent". These eight trends impact consumption, consumer behaviour, and the IMCD industry's response to the lockdown. Sheth (2020) asserts that most habits will return to normal after the

[4] McKinsey & Company is a management consulting firm, founded in 1926 by James O. McKinsey. The company provides advice on strategic management to corporations, governments, and other organisations.

[5] McKinsey & Company : https://www.mckinsey.com/business-functions/marketing-and-sales/our-insights/survey-south-african-consumer-sentiment-during-the-coronavirus-crisis

[6] The Media Online: https://themediaonline.co.za/2020/11/what-trend-score-reveals-for-marketers/

lockdown. There will be modifications, and new habits and social distancing will disrupt consumer behaviour. Since the consumer could not go to the store, the store had to come to the consumer. After the lockdown, consumers returned to stores but continued to use the internet and delivery services as part of their hybrid buying behaviour. The effects of the lockdown on the South African economy impact consumer purchasing power, limit the demand for products and services and potentially affect the need for IMCD services.

2.3 Impact of the lockdown on consumer and buyer behaviour, the internet, and social media

According to Balinska (2009:par 4.2), "A distinction should be made between "behavioural" and "emotional" implications in a pandemic situation. Population behavioural reactions include panic, non-compliance, resistance to travel restrictions, breaking of quarantine and isolation, and civil unrest. In contrast, emotional responses to a severe epidemic could lead to increased anxiety, depression, suicide rates, traumatic stress reactions, and complicated grief". These pandemics impact consumer behaviour (Miri, Roozbeh, Omranirad & Alavian, 2020) and health risk mitigation (La Torre, 2019). The macroeconomic impacts of unemployment, uncertainty, and economic recession followed these epidemics.

Sheth (2020) suggests that traditional habits would be replaced by more effective ways of consuming and purchasing products, with consumer behaviour shifting to technology-based approaches by sourcing goods and services and health information online. Consumers began to choose purchases mediated by technology, becoming more flexible in their choice of retailers and service providers whilst reducing the risk of potential infection. Technology drove more online awareness, extending to product and service categories that were not traditionally strong online (Zwanka & Buff, 2020). The excessive use of the internet associated with health anxiety and distress was denoted as cyberchondria, the 21st-century condition of hypochondriasis (Starcevic, 2017), fuelling cybercondriacs to make unusual purchases that affect their traditional purchasing habits. Laato, Najmul Islam, Farooq & Dhir (2020) suggest that in previously recorded pandemics, social and behavioural science focused heavily on preventative and health responses whilst giving less attention to consumer and buyer behaviour.

Consumer and buyer behaviour varied between the pandemic and post-pandemic periods. Pandemic responses led to increased food and beverage purchases, hygiene items, and medicines, triggering stockpiling (Cruz-Cárdenas, Zabelina, Guadalupe-Lanas, Palacio-Fierro & Ramos-Galarza,

2021), whilst the consumption and use of services in the entertainment, restaurant, tourism and travel decreased (Antonides & van Leeuwen, 2020; Arndt et al., 2020).

Post-pandemic responses were characterised by a more hybrid approach to purchasing behaviour, choosing not to return to pre-lockdown conditions but combining old traditional ways with new technology-based ones (Cruz-Cárdenas et al., 2021). Another by-product of the lockdown is the increase in wastage due to the use of packaging material (Oliveira, Azeredo, Neri-Numa & Pastore, 2021). The lockdown also saw increased internet and social media usage, with research indicating that people who feel lonely tended to use social media more often, preferring this to physical interaction (Nowland, Necka, & Cacioppo, 2018). Social media was viewed as a platform for exchanging data about products and services (Surenderkumar, 2016), evolving as an essential tool for product reviews, with social media accessible at any time of the day or day of the week (Boon et al., 2022). Boon et al. (2022) suggest that online users have begun forming social connections with brands. His research indicated that consumers typically preferred a greater variety of options, with online consumers accessing this via social media. A study of online shopping showed that social media played a vital role in the relationship between product variety and consumer purchase (Clemes, 2014).

The impact of the lockdown on changing consumer and buyer behaviour and the demand for online information as well as goods and services would mean IMCD organisations would have to adapt to re-evaluate their response to their traditional approaches to marketing services.

2.4 Impact of the lockdown on human wellness

The COVID-19 pandemic contributed to depression and psychological distress resulting from continuous and intense unmanaged or undealt with stress due to an individual's difficulty in coping (Cummings, Zhang, Gandré, Morsella, Shields-Zeeman, Winkelmann, JSarah Augusto, Cascini, Cserháti, De Belvis, Eriksen, Fronteira, Jamieson, Murauskiene, Palmer, Ricciardi, Samuel, Scintee, Taube & van Ginneken, 2023). The pandemic provided several stressors: the threat of infection, infobesity (information overload) and the unknown, confinement, social exclusion, and the danger of financial/job loss (Hamouche and Chabani, 2021). Cognitive overload, a form of information overload, can trigger a stress response to retreat (Sweller 2020). The inability to process available information forces people to guess the severity of a situation, falling back on pessimistic views to feel safe (Laato et al., 2020). Research into mental health relating to disasters has indicated that emotional stress is present every day and indeed to be

found in populations affected by the COVID-19 pandemic (Pfefferbaum et al, 2023).

The lockdown accelerated workplace transformation, challenging how we work, where we work, socialise, learn, and communicate (Carnevale & Hatak, 2020). It is evident that employees compelled to work from home during the lockdown faced a potential mental wellness crisis and that productivity, time off, and support needed consideration.

2.5 Impact of the lockdown on working from home

The literature reviewed suggests that the lockdown accelerated online commerce and communication. The lockdown made the digitisation[7] of work styles progress faster, with post-lockdown corporate strategies facing rapid digital transformation (Kodama, 2019). The digital shift in work styles gained attention, and demand in society is rising (Kodama, 2020). The lockdown created a need for organisations to adopt new remote working methods to maintain high service levels to clients (Khudhair, Alsaud, Alsharm, Alkaabi, AlAdeedi, 2020). It would be safe to assume that the rapid workplace transformation would impact the IMCD industry, especially since it is so critical to many other industries, such as the entertainment, travel, and transport industries, which were heavily impacted by the lockdown.

The lockdown forced employees into a rapid (almost overnight) adoption of working from home (Carroll & Conboy, 2020). According to Richer (2020), lockdown became a catalyst for digital working tools, impacting people's workplace practices and home commitments such as childcare and personal time management. Other factors included computer access, internet access shared with family members, and daily videoconferencing, all adding to their stress.

The lockdown allowed employees to meet in new ways and be more flexible, creating new management and independent working styles. Matli (2020) continues to state that remote working has positive aspects, but the risk of a stressful, unbalanced workload and pressure to meet deadlines would impact health. Kramer and Kramer (2020) identified that informal face-to-face meetings at the office and travelling to and from work assisted in breaking the routine of being permanently in one place. The employee, through lockdown, has been forced to adopt online collaboration platforms and videoconferencing to work 100% remotely (Davison, 2020). Before the lockdown, employees within specific organisations had the option to work from home, whereas, during the lockdown this became mandatory. The lockdown influenced the flexibility of work hours but negatively impacted

[7] Digitisation is the conversion of analogue methods to digital methods.

work by blurring private and public spaces and the pressure of ‘constant connectivity'. Internet and software have enabled the transition to the online homework environment, which may not have been possible in the past (Richter, 2020).

The home office has rapidly transformed from ad hoc to a more sophisticated formal environment driven by technology. The pandemic has, in a short timeframe, had broad implications on innovation, especially in areas such as e-learning, manufacturing, printing, healthcare, and e-commerce (Brem et al, 2021). As a technology-driven sector, the IMCD industry would invariably face similar challenges and the consequences borne from these and would need further study.

2.6 Impact of the lockdown on business resilience

As a small IMCD business owner, I experienced business sustainability challenges during the lockdown. These challenges led to my desire to review the literature on business resilience. According to Staw, Sandelands and Dutton (1981), a business's response can be functional or dysfunctional, determining its strategic position and survivability. The ability to recover from adversity is a characteristic of resilience, where leaders can adapt, adjust, and reinvent their organisations (Fiksel, 2015; Linnenluecke, 2017). Business owners could develop different sense-making during a crisis (proactive resilience), wait it out (passive acceptance), and wait for better trading conditions. Businesses had to move from emotional responses to threats and pass routine problem-solving methods for resolution (James, Wooten & Dushek, 2011, p. 459).

Sakar (2021), Hamel and Välikangas (2003), Baker (2007), Sarasvathy (2001), Weick (1988), Kendra and Wachtendorf (2003) and Weick (1993) identified steps or phases in developing business resilience:

These steps are:

Accepting: Being aware of the impact of change on current business practice (Hamel & Välikangas, 2003).

Stocktaking: The stocktaking of available resources such as finances, orders, commitments, personnel, and physical resources under the business’ control (Baker, 2007; Sarasvathy, 2001).

Enacting: The cognitive sense-making of 'what do I do next?' is preceded by action focusing on cognition (Weick, 1988, p. 307).

Adapting: Adapting involves "a willingness to overturn or bypass experience" and be prepared for new solutions even though there have been solutions to similar problems before (Kendra & Wachtendorf, 2003, pp. 42-43).

Adapting the business model: A bricolage is the result of making with what is at hand or by adapting something from a diverse range of things, which is essential for organisational resilience (Weick, 1993).

According to Hadjielias, Christofi and Tarba (2022), personal resilience is driven by the ability of an owner-manager to recover and restore personal well-being disrupted by the lockdown. Consequently, personal resilience drives leadership resilience, the ability to bounce back and underpin the adjustments needed to capacitate leadership. Their findings linked leadership resilience with business resilience. Their work identified business changes in three areas: (a) workplace harmony and collectivism, (b) business agility, and (c) resource mobilisation for the organisation. Their work suggests that these core areas were essential in improving business resilience and enabled businesses to recover or thrive during the pandemic (Hadjielias et al., 2022, pp. 1371-1373).

2.7 Discussion

In the literature review, specific themes could be identified, particularly the impact of the lockdown on consumer and buyer behaviour and how this impacted marketing, social media, technology, business sustainability, and brand management. Other themes emerging included human health and wellness, as well as the involvement of technology in managing the lockdown's impact on work and home life. The literature review revealed nothing specifically relating to the pandemics impact on the South African IMCD industry. Existing literature tended to be global in persective.

The existing literature needs follow-up, particularly from a post-lockdown perspective, as most articles were written during the 2020 and 2021 pandemic years. The literature covering human wellness and home-work life impact on the global population indicates that the study is appropriate for building and developing existing knowledge.

The literature review does allow for adequate context, considering the almost uniform global response to the pandemic. The impact and reaction to managing lockdown restrictions were not unique to any country that applied those restrictions. Current academic literature points to the lockdown's effect on purchasing behaviour and the demand for products and services, leading to organisations needing to adapt their plans and budgets. I found literature relating to business resilience and economic sustainability during

the lockdown, but unfortunately, nothing that was explicitly related to the IMCD industry.

As a business owner within the IMCD industry, I had first-hand experience of the effects of lockdown. I watched as requests for design and communications projects dwindled and eventually dried up. I also experienced the solitude and remoteness of working from home, being unable to conveniently and effectively engage with peers within the industry, staff, clients, and suppliers. I realised the lockdown could catalyse change and re-evaluate how, where, and when brands do business.

Chapter 3. Methodology

3.1 Introduction

The lockdown resulted in a dramatic shift in how consumers spend their time and money and the place where this occurs, resulting in where, when, and how goods and services are provided in the future. Exploring these dramatic shifts is essential as the IMCD industry has a pivitol role in promoting economic recovery and growth after the pandemic. This chapter will cover the study's research methodology in detail.

3.2 Research design

The study identified the impact the lockdown had on the South African IMCD industry, and the measures taken by the IMCD industry in response to the lockdown. The case-based approach was considered ideal due to the nature and objectives of the study. The study followed a qualitative, case-based approach using semi-structured interviews as it relied on the personal experiences of industry stakeholders during the lockdown. These personal experiences differed from interviewee to interviewee, influenced by their role within and specialisation of the organisation's core business.

According to Starman (2013), qualitative research is defined by an interpretative paradigm highlighting individuals' meaning and subjective experiences. Starman (2013) also maintains that a researcher's subjective views about an event play a vital part in study results. Flyvbjerg (2006, p. 223) states that case-based studies are essential for developing different views of reality, including the awareness that a rule or a theory cannot drive human behaviour. He asserts that case-based studies can also contribute to the professional development of a researcher, which is an added advantage and motivational factor in choosing this method of study.

A thematic framework and interpretive approach guided the methodology (Attridge-Stirling, 2001; Yin, 2018). Thematic networks using this framework grouped standard variables (basic themes) into organising themes (global themes). The development of a thematic network initiates with the recognition of Basic Themes and advances inward to create a Global Theme. Following the identification of a collection of Basic Themes, these themes are classified according to the narratives they represent, resulting in the formation of Organizing Themes. These Organizing Themes are then reassessed in connection with their corresponding Basic Themes and integrated to present a cohesive conclusion or overarching theme, referred to as the Global Theme.

The thematic analysis allows for flexibility in the interpretation of data and the ability to analyse large data sets by organising them into broader themes.

According to Braun and Clarke (2006) and King (2004), thematic analysis helps capture the complexity of data, examine different perspectives, and highlight patterns, trends, variations, or similarities, as well as potentially generate new and unexpected insights. Braun and Clarke (2006) highlight the importance of identifying themes that capture the importance of the data in relation to the research question, representing some level of patterned response to the data set. A thematic analysis carried out within a constructionist framework is underscored as not aiming to concentrate on motivation or individual psychological factors. Rather, it aspires to theorize the socio-cultural contexts and structural conditions that facilitate the individual narratives presented. King (2004) discusses the ability of thematic analysis to summarise key features of data, producing a clear and organised report by compelling researchers to take a well-structured approach to handling data.

The study also followed Elliot and Elliot's (2005) process of analysing the transcriptions and identifying and reporting the themes. Elliot and Elliot's (2005) case-based approach is phenomenological, capturing personal experiences and drawing common themes from the data. The case-based approach allowed the respondents to speak freely and for themselves, to prioritise their key issues and to allow for unbiased data collection.

Two semi-structured open-ended questions probed interviewees about areas affected by the COVID-19 pandemic lockdown, the impact of the lockdown and their response to the lockdown.

3.3 Population and sampling

The population comprises 45 mid- to large-sized organisations (ten or more staff members) from the Association for Communication and Advertising in South Africa (ACA), with head offices in Johannesburg or Pretoria. The ACA is the official representative body of South Africa's advertising and communications profession, comprising local and internationally based member organisations. The ASA is a voluntary organisation committed to fostering trust, positively impacting agencies' professional and operational standards, and transforming the advertising and communications industry[8]. The ASA abides by the Advertising Regulatory Board (ARB) Code and is represented on relevant ARB committees. Of the 45 organisations approached, 15 companies participated. The companies have an integrated approach and do not exclusively focus on just above-the-line[9] or below-the-

[8] https://acasa.co.za/
[9] Above-the-line advertising (ATL) is when advertisers aim to reach a large audience by using radio, television, print media, and billboards.

line[10] work. There were two persons from Grey and two persons from Ogilvy. In addition, the ACA chairperson, Karabo Songo, heard about the project and contacted the author, which led to them to being interviewed for the study. One person from McCann contacted the author in March 2023, leading them to be interviewed and included in the study. The final sample consisted of 18 participants. The companies, participants, and the dates of the interviews are listed in Table 3.1 below:

[10] Below-the-line (BTL) advertising is directed to reach a small, targeted audience. BTL includes marketing activities such as brochures, direct mail, flyers, sponsorships, and email campaigns. Below-the-line advertising is an advertising strategy where products are promoted in media other than mainstream radio or television such as promotions, activation, experiential, and events, among others.

Table 3.1. Companies, participants, and interview dates

Company	Participant	Interview date
Grey Advertising	Louise Johnston Paul Jackson	30 August 2022 (email response) 15 September 2022
Joe Public Advertising	Ben Shapiro	1 September 2022
MatteBlk Marketing Agency	Buyi Mafoko	6 October 2022
Havas Marketing Agency	Carel Scheepers	11 October 2022
VMLYR Integrated Marketing Agency (Now VML)	Imran Patel	11 November 2022
99c Advertising and Communications Agency	Marius van Rensburg	22 November 2022
King James Advertising Agency (Now AccentureSong)	Lesego Kotane	22 November 2022
Black Wolf Digital Marketing Agency	Sven Wolf	22 November 2022
The Machine Advertising Agency	Amy Hopkins	22 November 2022
Murmur Digital Marketing Agency	SJ Naude	22 November 2022
Ogilvy Integrated Marketing and Communications Agency	Peter Little Stuart Ponton	29 November 2022 1 December 2022
FoxP2 Advertising Agency	Lynda Fiebiger	29 November 2022
M&C Saatchi Abel Integrated Marketing and Communications Agency	Nival Maharaj	30 November 2022
M&C Saatchi Abel Integrated Marketing and Communications Agency	Monalisa Zwambila	6 December 2022
ACA chairperson	Karabo Songo	6 December 2022
McCann Integrated Marketing and Communications Agency	Derek Cole	15 March 2023

3.4 Data collection

This section covers the data collection process, describing the interview and questioning processes. It will also detail how the interviews were set up, recorded, and then transcribed, as well as the process of validating these transcriptions with the interviewees.

3.4.1 Interview process and questions

As an active member and known within the IMCD industry, my experiences had the potential to influence the interviews. To mitigate potential bias, I

contracted Gerald Goslin to set up the appointments and Anneke Dehrmann to conduct the interviews. The reason for using independent research assistants was to avoid confirmation bias (Peters, 2022). Gerald Goslin and Anneke Dehrmann received financial compensation of R10,600 and R10,000, respectively. The Tshwane University of Technology's Department of Visual Communication funded the research assistants.

Goslin scheduled the appointments via telephone and email. Each ACA member was first called and followed up by email using their contact details published on the ACA website. Sixteen organisations approached did not respond, and the reasons were uncertain. Seven organisations had inactive websites or websites with poor contact details. Two organisations agreed to participate but did not attend meetings or respond to further communication. Six organisations chose not to participate. The breakdown is available as Addendum C. I obtained consent from 15 organisations, yielding 17 positive responses (two responses from Grey Advertising and two responses from Ogilvy) (see Table 3.1).

Dehrmann, a lecturer at INSCAPE, collected the interview data. Dehrmann holds a Master of Commerce in Marketing Management.

Dehrmann began the interview by introducing herself, describing the process and then posing the following two open-ended questions:

- How did the COVID-19 pandemic lockdown impact your business?
- What did you do to adapt to the changing circumstances, and why?

Dehrmann used follow-up questions to get better clarity and probe deeper for more detail, taking care not to lead the participant.

Dehrmann interviewed the participants via MS Teams over three months, from 1 September to 6 December 2022. The interviews ranged between 15 to 20 minutes. Interviewees focused their responses on either the effect or responses to the COVID-19 pandemic lockdown based on their preferences and what they felt was important at the time of the interview. The 18 participants' positions in their companies are given in Table 3.2.

Table 3.2. Breakdown of interviewees' roles within their organisation

Participants' role in their organisation	**Number**
Managing director	6
Chief executive officer	3
Executive creative director	4
Strategic director/head	2
New business director	1

Brand director	1
Non-executive director	1
Total	18

3.4.2 Transcription and validation of the participants' answers

Interviews with management occurred online with permission to record the discussion (audio) before the interview commenced. The professional transcription service TranscribeMe! was then commissioned to transcribe the interview. Goslin emailed these transcriptions back to the interviewee in MS Word for validation and approval, allowing the participants to redact or correct any mistakes that they felt would prejudice their organisation and intellectual property. There were modifications to two transcriptions; one improved the accuracy of the detail within the transcription, and one removed client names.

3.5 Data analysis

The transcripts were analysed manually, guided by the themes identified in the pilot study done for DEFSA, with further themes emerging as the data was collated. Themes were first collated into basic themes (preliminary theme identification), which in turn were synthesised into global themes (variables) that were finally set into key organising themes. ATLAS.ti automated the collation of transcripts, which sped up the process of managing the data and assisted in identifying common variables, trends, or data patterns by volume in a consistent, unbiased manner, speeding up the manual process. The transcripts were manually analysed to identify key variables by volume, grouping them into themes drawn from the study's objectives.

The analysis identified five organising themes within the impacts of the lockdown, namely client revenue, staff well-being, technology, operational management, and productivity. Each theme contained variables and how frequently they appeared. These results appear in Table 4.1 in Chapter 4. I also identified five organising themes within the response to the lockdown. These are client/agency re-evaluation of relationships, adapting or repositioning service offerings, more focus on human capital as an asset, deeper immersion of technology in productivity, and intensified collaboration. Each theme contained variables and how frequently they appeared. These results appear in Table 4.2 in Chapter 4.

3.6 Delimitations and limitations – quality of data

The study was delimited to the South African IMCD industry. The reason for this is that the Association for Communication and Advertising South Africa (ACA) is the representative body within the IMCD industry in South

Africa, and by approaching the entire member database of 45 organisations, the quality and credibility of the results were managed.

Limitations faced during the data collection process included the availability of a time slot to conduct the interview and the amount of time the interviewee could allocate to the time slot. These were addressed by contacting the potential respondent via a contact number followed by emails. To manage the limitations, interviews were made shorter or done after hours. One respondent was unavailable for a face-to-face interview and responded by written response. The process revealed that some contact details were incorrect, non-existent, or assigned to the wrong person. These results are captured in Addendum D. The quality of the online connection made some words inaudible and thus unable to be transcribed. The vetting of the transcriptions mitigated this. Limitations faced by the analysis process included using different words by the interviewees to imply the same thing and whether the concept of employee wellness or well-being meant mental *and* physical health.

3.7 Ethical considerations

The study received ethical clearance from the Faculty of Arts & Design Research Ethics Committee (FCRE) on 20 June 2022 with a clearance number of FCRE20220620 (see the clearance certificate in Addendum A). The study did not raise any ethical concerns or appear to cause any harm to the interviewee or the company they represented. An email requesting consent with permission to record preceded each interview. These interviews were professionally transcribed and then sent back to the interviewee for validation and approval, as well as an opportunity to redact any content that would prejudice their organisation and reveal intellectual property. The interviewee could decide what level of anonymity of source they wished to be captured in the transcripts, ranging between name, name and surname, company name, a pseudonym, and anonymous. The raw data will be stored on a separate and labelled memory stick and destroyed after three years.

3.8 Participant non-anonymity

According to Dube, Mhlongo and Ngulube (2014), anonymity and non-anonymity have benefits and limitations. The gains or losses of choosing either must be determined for the researcher and researched. The assumption that enforced anonymity protects the researcher may not serve the interests of the researched. Smith (1999) states that conclusive or enforced anonymity may perpetuate inequality and disempower the researched from their right to ownership and recognition. Within the study, respondents chose to either be anonymous or exercise confidentiality. All 17

respondents chose non-anonymity, providing validity and credibility to the data.

Chapter 4. Results

4.1 Introduction

The study's results revealed the extent to which the IMCD industry was unprepared for the COVID-19 pandemic. The study revealed five themes around the lockdown's impact and five themes around the measures in response to these impacts, revealing similarities with other affected industries and differences around the facilitation of creative execution and management, which were specific to the IMCD industry. It could be argued that the lockdown "shook up" how the traditional IMCD industry went about its business, forcing management to re-evaluate how it engaged with its staff and clients and how, when, and where the organisation would do business. The dissonance offered by the lockdown led to the accelerated migration from traditional marketing strategies and tactics to digital, online, and handheld platforms.

The findings are split into two main areas: the impact of the lockdown on the IMCD industry and measures in response taken to adapt to these changing circumstances.

4.2 Impact of the lockdown on the IMCD industry

The study identified five themes dealing with areas impacted within the IMCD industry: client revenue, staff well-being, technology, operational management, and productivity. Each is covered individually, providing detail and offering more in-depth insights. I also include extracts (in italics) from the transcriptions to emphasise and support these insights. Table 4.1 provides the frequencies of the variable and the number of companies that mentioned these issues. A discussion of the five variables follows the table.

Table 4.1: Summary of the impact of the COVID-19 pandemic lockdown on the South African integrated communication marketing and design industry

Theme	Variable	Number of companies affected
Client revenue	New business growth	6
	Business lost	5
	Business reduced	4
	Business retained	3

Staff well-being	Meeting fatigue	3
	Pressure to change and adapt to new technology	3
	Mental health challenges	2
	Anti-vaccination	1
	Emotional well-being and support	1
	Long working hours	1
	Mental fatigue from stress and illness	1
	Staff Illness due to COVID-19	1
	Staff retrenchments	1
Technology	Demand for more data and internet access	4
	Pressure to adapt	4
	Rapid deployment to online	4
	Rapid deployment of hardware and software	2
	Connectivity challenges	1
Operational management	Traditional methods of engaging in the office ceased	4
	Brainstorming was challenging	2
	Digital media had less accountability, fewer checks and balances before publishing	1
	Infection controls disruptive	1
	Management needed to shoulder staff personal challenges	1
	Meetings were challenging	1
	Move from paper-based project management to online	1
	Organisations working online thrived	1
	Rationalising expenses	1
	Staff redundancies for non-core jobs	1

Productivity	Creative engagement affected	3
	Drop in productivity	2
	Inter-colleague engagement disrupted	2
	Broken concentration	1
	Digital agencies unaffected as already online	1
	Large online meeting groups cumbersome	1
	Processes impacted	1
	Traditional agency staff (analogue) struggled with online interaction	1
	Unable to read facial expressions in a meeting due to face masks	1

4.2.1 Client revenue

With the hard lockdown of March 2020, most South Africans were forced to stay indoors. This sudden change in human living has resulted in industries such as tobacco, alcohol, travel, tourism, events, petrochemicals, and restaurants being affected (Arndt et al., 2020). The reality of this lockdown meant that many IMCD industry clients either suspended or cancelled work orders and, in some situations, revised their retainers with their IMCD organisations. These realities, in turn, would then impact suppliers to the IMCD industry who relied on third-party work.

The research revealed that nine respondents within the IMCD industry either experienced a loss or reduction in business. This correlated to the findings by McKinsey (2021), in which it was identified that a 45% decrease in essentials bought by South Africans and that 60% of South African consumers would not be returning to traditional buying patterns post lockdown. The findings also indicated that 80.6% of members within the industry had changed their relationships between marketers and agencies, with below-the-line spending dropping 26.6%.

Six respondents benefitted from the crisis,-particularly those who service fast-moving consumer goods and financial and health services. Sheth (2020) indicated that traditional purchasing habits would be replaced with more effective ways of consuming and purchasing products and given the gravity of the COVID-19 pandemic, food security, financial anxiety, and self-medication would drive this demand. Cruz-Cárdenas et al. (2021) noted that

the response to the lockdown led to increased food and beverage purchases, hygiene items and medicines, triggering stockpiling.

Respondents who provided digital and social media services as a core offering were relatively unaffected or performed well during the lockdown as traditional marketing strategies shifted to online ones. McKinsey's (2021) briefing identified that the switch from work-from-office to work-from-home resulted in a drop of 3% in digital media buying but a 1% increase in digital media creative and content spending with a 90% flight to digital and online channels when purchasing products and services. Respondents grappled with the change in government health regulations that restricted movement and human interaction, which impacted employee and client movement and interaction. In response to the shift in the IMCD industry, the industry had to partner with its clients to shore up revenue and alleviate client panic by being innovative and often proactive in its creative design solutions.

Some of the comments from respondents about suspended and cancelled work orders reiterated the problematic operating environment experienced during the lockdown:

"There is no doubt that COVID hit our clients hard, which in turn affected our agency." ***Grey Advertising***

"A lot of clients cut their budgets or ceased projects, or postponed indefinitely, creative projects that we were working on." ***Murmur Advertising***

"And so that's what made people obviously come back slower or clients to be able to come back slower, and for that purpose, spend less money with us, which obviously affected our business as well." ***McCann***

In contrast, some of the digital agencies responded positively:

"100% income and then operationally, because we are a digital native business, operations, if anything, we saw an improvement." ***Black Wolf Agency***

"Our website design and e-commerce business just grew." ***VMLYR***

4.2.2 Staff well-being

The results revealed that the lockdown and the subsequent isolation due to being required to work from home affected human resources within the

IMCD industry. The pandemic provided stressors such as the threat of infection, infobesity (information overload) and the unknown, confinement, social exclusion, and the danger of financial/job loss (Hamouche and Chabani, 2021) and was experienced across all industries, with Pfefferbaum et al (2023) stating that research into mental health relating to disasters indicated high daily emotional stress. The results confirm this. Laato et al. (2020) pointed out that an inability to process available information led to people guessing the severity of the situation and falling back onto pessimistic views to feel safe. Their pessimistic views covered everything from potential layoffs to family loss, sickness, work/home convergence, isolation, and physical illness. Staff often worked irregular hours, sometimes having to learn new technology and remain well-motivated and mentally strong, with the responsibility to create and maintain an effective environment falling on management's shoulders. The below extracts from the interviews highlights some of the sentiment experienced by the industry.

"And I think that had an emotional toll on a lot of people during that period, because work used to be work space and home used to be sort of like safe home space." ***99c***

"And the personal impact on people was significant as well. A lot of people lost loved ones. There was a lot of mental illness issues and so on. So, it was a very difficult time for our staff." ***Grey Advertising***

The lockdown also impacted staff functions, mainly cleaning and reception, who found themselves redundant and unable to perform agency functions.

"And I think, once again, digital natives, no problem. But a lot of the traditional guys did struggle with that. It just became more evident and more important to be able to use those tools efficiently and effectively within your workflow." ***Ogilvy***

"For many of us, it was the sudden change of having to work remotely, whereas, for a lot of us, we had been predominantly office-based. And so that affected culture, I think, incredibly." ***Machine***

4.2.3 Technology

Almost overnight, the IMCD industry faced migrating its staff from offices to their homes. The results indicated that organisations within the IMCD industry had to rapidly deploy online, with a demand for data and internet access. The industry also had to rapidly deploy hardware and software whilst under pressure to adapt quickly. One organisation had a staff complement of 450, which meant the need for many laptops and reliable

internet, which had implications regarding cost and the logistics of distributing these. Management had to be proactive and responsive, dealing almost overnight with issues around data cost, internet stability, and airtime for work. The lockdown created a need for organisations to adopt new remote working methods to maintain high service levels to clients (Khudhair, Alsaud, Alsharm, Alkaabi & AlAdeedi, 2020). Funding, laptops, data, insurance, and software increased operational costs and became challenging. Almost overnight, the lockdown forced employees to rapidly adapt to working from home (Carroll & Conboy, 2020). According to Richer (2020), lockdown became a catalyst for digital working tools, impacting people's workplace practices. The traditionally trained creatives struggled to adapt, whilst those who grew up in a digital era (digital natives) found it easier to adapt and be resourceful online. The extracts from the transcripts below highlight the need to rapidly adopt technology to address the challenges of remote work.

"Yeah. Maybe, again, for digital natives versus your more traditional kind of creatives, it was a lot easier, I think, on the digital guys because we -- and I say we. I'm just kind of bucketing myself in the digital creative realm, but we're very used to being resourceful and using online tools to achieve what we need. So that wasn't a massive shift for us. But I think for the traditional guys, a lot of them, their concepts and their ideas come from that interaction with other people, and it's not as much an individual thing." ***Ogilvy***

"We had the initial lockdown, which lasted far longer than we expected. We had to quickly adapt using technology. There was a cost to that. We had to quickly adapt. The kind of business we're in really entails a lot of connectivity, collaboration, brainstorming, and so on." ***Grey Advertising***

"We had to embrace technology much quicker than… -- we had been trying for years. We'd been trying to use tools like Teams for years and years, and all of a sudden, we had to adopt it overnight." ***Grey Advertising***

"And for people to download files, they were like, "Sorry, I can't download files. I haven't got that much data. So, sending them some prepaid data for them to then download the files or upload the files, whatever. So that was something that we had implemented." ***FOXP2***

Some respondents indicated they had already been using an online meeting platform like Zoom and Microsoft Teams (MS Teams), so the lockdown had less impact than organisations not meeting online.

"Pre-COVID, we did dabble in a bit of Zoom because we're a global agency. And we also have a pan-African footprint. So now and then, we'd be on Zoom." ***Havas***

"No, I don't think there was an impact. I mean, we actually had one of our team members move to Israel at the time. And I think with the introduction of Microsoft Teams, because that's traditionally the platform that we work on…" ***FOXP2***

4.2.4 Operational management

The lockdown resulted in office premises being vacated indefinitely. With the easing of lockdown restrictions, these offices needed sanitising. The managing of meetings and the complexity of meeting offsite were often challenging, straining client-agency relations. The review of work, creative brainstorming process, and online presentation to clients were often challenging to navigate due to either the size of the online meeting in attendance or the inability to read body language and facial expressions. These processes proved to be slow and tedious. Operations had to constantly take cognisance of the human toll that the COVID-19 pandemic was having on its staff, whether through loss of life, work-life imbalance, or budget cuts. Some staff functions became redundant, such as cleaning, driving, office administration, and office expenses had to be rationalised. Respondent agencies indicated that their senior management chose to take salary cuts instead of making their staff redundant. According to Staw (1981), a business's response can be functional or dysfunctional, determining its strategic position and survivability, and this placed a significant burden on management who had to not only focus on the day-to-day responsibilities of running a business but also had to navigate a business response to the lockdown, which was something that had never been experienced before. The ability to recover from adversity is a characteristic of resilience, where leaders can adapt, adjust, and reinvent their organisations (Fiksel, 2015; Linnenluecke, 2017), and management could either be proactive or wait for better conditions.

"No, management was difficult. Because technically you still had your reviews, it was just done over a Zoom meeting, and to an extent, you still get the foundation of what the meeting is supposed to do. What you don't is a sense of the room, and the spirit of what is going on." ***99c***

"It needed to change in that before one would [inaudible], having a cup of coffee in the lunchroom, and you could do a very quick check-in with somebody. And so we knew very early on that those… -- because we also have a young base of team members, we knew very early that the difference

between senior team members and junior team members would require different support structures." ***Black Wolf***

"There was a massive burden on the leadership and the management of the business to carry people, checking up on them on an ongoing basis. Huge emotional burden as well in terms of calling people, consoling them, etc., etc., looking after them." ***Grey Advertising***

"But for example, drivers, cleaners, office admin, and management staff weren't able to fulfil their role as they would normally do." ***M&C Saatchi Abel***

"But that social aspect of being in the office is also very, very key because I think especially when you're part of the creative team, you almost forget how important body language is when dealing with your colleagues and giving feedback on work and workshopping and balancing ideas off each other. Yeah, it's very difficult to do that behind the virtual kind of Teams call at times." ***Ogilvy***

4.2.5 Productivity

With the promulgated lockdown restrictions, all staff were sent home to self-isolate and work remotely, replacing traditionally in-person workflows with impersonal remote ones. Challenges arose around briefing work into an organisation, streamlining it effectively whilst not in person to garner consensus, and brainstorming the creative work to ensure the brief was met. The results indicated that staff had different work styles and times of the day in which they would work, exacerbated by the blurred lines between work and home life. The results also indicate a malalignment of the various work functions from client service, creative, and production, while noting that more online meetings to circumvent this meant less time to do the work. The volume of online meetings that required attendance meant that the creative work generally happened in the evening. The mental and physical health impacts of isolation and the lockdown diminished productivity. Isolation also impacted agency culture, which reduced productivity. The responses below reflected the challenges COVID-19 placed on productivity whilst working remotely.

"Yeah, processes were impacted. I think, we obviously have to create new processes, figuring out how to keep the productivity going, figuring out how to deliver…" ***King James Group***

"And I think, particularly from an operations perspective, managing people's time and ensuring that briefs are done correctly because, I think, previously, it's easy to brief a person potentially in person." ***Machine***

"But then also if you send… -- for example, with us having to look at a lot of creative work, someone sends it to you at 3:00 in the morning, which means you only get to review it the next day, and when there are changes, it only happens the next day. So, everything was a little bit more delayed and more difficult. And quick changes and turnarounds and reverts weren't as easy to come by." ***Black Wolf***

4.3 Measures taken by the IMCD industry in response to the lockdown

Chapter 4 identified five measures the South African IMCD industry took in response to the impact of the lockdown: client/agency re-evaluation of relationships, adapting or repositioning of service offerings, more focus on human capital as an asset, deeper immersion of technology in productivity, and intensified collaboration. Table 4.2 summarises the measures of the South African IMCD industry took in response to the lockdown. A discussion of these measures follows the table.

Table 4.2. Summary of the measures taken by the South African integrated communication marketing and design industry in response to the lockdown

Theme	Variable	Number of companies affected
Adaptation of client relationship	Deepening partnership with client	6
	Client engagement now online	1
	Customer care strategies	1
	Impacted on client relationships	1
	More proactivity with client	1
	Partnership relationship developed	1
Adaptation of offering	Ability to adapt operations	5
	Shift to digital marketing platforms	5
	Management resilience	3
	Strategic segmentation of offering	2

	Quicker response times	1
	Re-evaluation of priorities	1
	Scaling down for impact	1
Human capital	Hybrid working week	7
	Management checked in on employee well-being	6
	Weekly online social engagement day	4
	Management took steps to manage staff wellness through wellness sessions	3
	Senior management took pay cuts to prevent staff cuts	3
	No staff reductions	2
	Adaptation to new ways of working	1
	Balance introverts with extroverts when hiring	1
	Bi-weekly online social engagement day	1
	Chose to protect job losses and negate profit	1
	Creating platforms for engagement for freelance work	1
	Creation of a lockdown task team	1
	Employed staff remotely	1
	Financial aid to staff to assist with the lockdown impact	1
	Mental stress management	1
	More online focus on project management	1
	New management styles and perspectives	1
	Rationalising space	1
	Relationship resilience	1
	Selective in-person meetings	1
	Workshops with psychologist to manage stress	1
Technology	Adoption and adaptation to technology	11
	Daily management meeting to work closer	1
	Virtual shooting of television campaign	1
Intensified collaboration	International opportunities opened	4
	Restructuring of business for greater efficiency	3
	More global collaboration	2
	Funding to support suppliers	1

4.3.1 Client/agency re-evaluation of relationships

The lockdown was unprecedented, and neither organisations within the IMCD industry nor their clients knew how to respond to the lockdown, forcing a relook at how they traditionally engaged each other. The results indicated that stronger proactive partnerships evolved between clients and themselves. Agencies were forced to renegotiate retainers and fees, restructure billing models, re-evaluate campaigns, and even suggest innovative new ways of marketing in response to the lockdown. The results corroborate Hadjielias et al. (2022) when stating that the personal resilience of the owner-manager drives their ability to restore personal well-being, which in turn drives leadership resilience and capacitates organisational leadership. The results show how capacitated leadership responded rapidly to the challenges of client/agency relationships to shore up business sustainability. Extracts from the transcripts below reveal how important the client relationship needed to be re-evaluated during the pandemic.

"What we did see, though, from a client point of view, is they were actually looking to us as a marketing, as an agency, partner to help guide them on what is it that we're able to do effectively to, one, still stay on top of mind on the consumers' minds." ***M&C Saatchi Abel***

"Something that we do pride ourselves on is not just being a supplier to our clients, but rather being a partner to them." ***M&C Saatchi Abel***

"So, what happened was I think a lot of it was around us needing to make ourselves relevant for clients, which was our responsibility. Do you know what I mean? Because then you would fast become irrelevant…" ***King James***

"But what we realised first and foremost is it really is always about putting the customer first, becoming a lot more proactive in our approach to add value, and just really looking for innovative solutions to deliver on their businesses." ***Riverbed***

4.3.2 Adapting or repositioning of service offering

Traditional agency revenue streams became restricted with the challenges of reduced client budgets and the impact of the lockdown on identified industries such as tobacco, alcohol, travel, accommodation and eventing. The IMCD sector was forced to adapt its service offerings. Digital or online advertising grew within the lockdown period due to its ability to reach customers individually at a low cost while tracking response rates. Digital marketing became more prevalent, and traditional above-the-line agencies

focused on these channels. Health and fast-moving consumer goods (FMCG) industries, particularly essential goods and services grew exponentially.

"100% income and then operationally, because we are a digital native business, operations, if anything, we saw an improvement." ***Black Wolf***

"So, when COVID had taken place, we reframed the growth strategy and created independent business specialised offerings. So, we then launched [inaudible] Digital, which is a specialised market and data agency." ***Black Wolf***

"These solutions varied from moving from physical to virtual platforms (such as the Savanna Virtual Comedy Bar and the Hunter's Lockdown Party), from traditional to digital channels and in some cases adjusting teams, resources, and fee structures so that we, the client, and agency both manage the challenges posed by COVID together." ***Grey Advertising***

"So, we decided to segment our businesses, and in that way, we could have very segmented, specialised conversations with clients and so we could speak directly into the needs as opposed to being a one-stop shop." ***Black Wolf***

"We ended up doing a lot more digital work and really had to grow our digital capability during that time." ***Riverbed***

"I can tell you from owning my own business during that process, my own agency also integrated digital marketing and integrated marketing. The day the lockdown was announced, our business exploded. Absolutely, yeah. Just exploded." ***VMLYR***

4.3.3 Human capital as an asset

The pandemic took a human toll, with health and mental wellness heavily impacting productivity and morale. The results indicated that the IMCD industry conscientiously put people before profits and managed to weather the storm through senior management salary cuts, cost containment, and renegotiation of rates and contracts with clients. It was evident that employees compelled to work from home during the lockdown faced a potential mental wellness crisis and that productivity, time off, and support needed consideration, and interventions such as online counselling and weekly check-ins helped address the isolation. The results emphasised employee support with organisational decision-making by management, which factored in around this. Online workshops with psychologists were

set up to manage stress within the organisation and assist employees struggling mentally and emotionally. Care packages were assembled and distributed, and special weekly or fortnightly events were established to re-establish agency culture and boost morale. Inspiration Fridays, Connection Day, Peep Show, Virtual Town Halls, Dad Joke Competitions and even free ice cream helped encourage staff interaction, restore agency culture, and raise morale. Carnevale et al. (2020) indicated that the lockdown accelerated workplace transformation, challenging how we work, where we work, socialise, learn, and communicate.

The lockdown influenced the flexibility of work hours, blurring private and public spaces and mitigating this with the internet and software, which has enabled the transition to the online home-work environment (Richter, 2020).With the lifting of lockdown restrictions, agencies chose to adopt a hybrid working week, as indicated in Table 4.3. This allowed staff the flexibility to attend to personal responsibilities and work on their own time.

Table 4.3. Hybrid working week models

Hybrid working week models	**Number**
Three days at the office and two days at home – (3/2) ratio	5
Two days at the office and three days at home – (2/3) ratio	1
Four days in the office and one day at home – (4/1) ratio	1
One day in the office and four days at home – (1/4) ratio	1
Agencies that did not indicate hybrid arrangements	7

The results also revealed the lockdown's impact on introverts and extroverts within the agency culture, with introverts thriving under the isolation of the lockdown. Care was taken to manage the energy within the organisation by balancing the number of introverted and extroverted employees. Mitigating the imbalance between introverted and extroverted employees was done during the staff recruitment and employment phase. The excerpts below highlight the need to relook how human capital could be managed to manage morale and productivity whilst preserving agency culture.

"That internal agency culture is definitely not the same as it was before. And it's about how we now then learn to adapt to the new way of working, making sure that you can still build that agency and client culture but also internal culture." ***FoxP2***

"So, we took a very humanistic approach very early on to ensure that the team members firstly internally felt safe and they felt secure." ***Black Wolf***

"And so, we realised that our makeup of our team leaned more towards one sort of type of personality than the other. We needed to then figure out how to mix those personalities together. So, whether we had more sort of introversion, we knew that when we did hire the project managers that they needed to be more sort of outgoing because they were then the energy mix that would bring people together and make people feel connected..." ***Black Wolf***

"We also helped the greater advertising community with Friends of Grey, a Facebook group that connects people to work […] This platform was and remains open to anyone in our industry and is not restricted to just Grey or even WPP agencies. With almost 900 members by June 2021, it's been deeply satisfying to help people find employment with both permanent jobs and freelance stints." ***Grey Advertising***

"*So, they cut budgets, and that had an impact on us as a business, and we had to re-engineer the way we ran the business. A lot of our senior leadership took salary cuts to make sure that it didn't impact the rest of the agency."* ***Grey Advertising***

"And then from a physical well-being point of view, something that was done is care packages sent to our various staff members through the year with things like multivitamins, some snacks, things like that, to keep people going." ***M&C Saatchi Abel***

"From a culture perspective, again, back to my point of that energy in a studio, that energy in any business, it was super, super hard to a) cultivate and maintain a culture, and b) just to maintain that kind of optimism and motivation. As a business owner or as a manager or director in the field, a massive part of your job is keeping people motivated, keeping people wanting to bloody work for you, whilst at the same time keeping yourself motivated for that part was very, very difficult." ***Murmur***

"During that time specifically, we spent a lot of time kind of trying to keep each other motivated. So, we had what we called inspiration Fridays." ***Murmur***

"*Let's make sure that you're talking to your employees first and properly before you talk to your customers. Your customers are panicking, they've got things going on. Your employees are focused on you, so let's engage with them."* ***VMLYR***

"I mean, the level of empathy at an exco level nowadays within large corporations is people are actually asking about the well-being of others." ***VMLYR***

"We helped our staff achieve a work-life balance by extending leave by five days, providing a mental-wellness day for everyone, daily discussions with senior managers to help those who were having a hard time, fortnightly virtual townhalls, and spirited activities like a Dad Joke Competition." ***Ogilvy***

"*So, the workshops that I mentioned were very much geared towards well-being, so mindfulness, mental well-being, stress management. So, it was delegated towards that as opposed to technical skills."* ***Black Wolf***

4.3.4 Deeper immersion of technology in productivity

The lockdown regulations meant the rapid adoption of remote working tools. Some respondents already used MS Teams as an online collaboration tool but intensified its use to manage increased information-sharing volumes, online meetings, and documentation. Respondents hired more project managers and digital designers in response to the growing demand for digital and online marketing. The study indicated that the respondents used various project management and meeting platforms such as Slack,[11] Scrum,[12] Figma,[13] Zoom,[14] and MS Teams.[15] Matli (2020) states that the lockdown allowed employees to meet in new ways and be more flexible, creating new management and independent working styles, and that technology could be a positive driver and corroborate the results.

"*I think, we obviously have to create new processes, figuring out how to keep the productivity going, figuring out how to deliver, and also because we work quite a bit in teams..."* ***King James***

"*But for me personally, one thing that has really come out of -- and I don't know if it is COVID-19 or if it's just in recent times with the digital innovation that has come out of the last two, three years, which subsequently started during COVID-19."* ***Ogilvy***

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11 Slack is an instant messaging program whereby users communicate via voice calls, video calls, text messages, or multi-media sharing in private chats or communities called workspaces.

[12] Scrum is a project management tool used in software development for teams of ten or fewer members who break their work into goals that are completed within time-boxed iterations called sprints.

[13] Figma is a collaborative tool used for interface design focusing on user interface and user experience design, with an emphasis on real-time collaboration.

[14] Zoom is a meeting platform used for voice calls, video calls, text messaging, conference rooms, virtual events, and contact centres.

[15] Teams is a meeting platform whereby users communicate via voice calls, video calls, text messaging, or multi-media sharing, offering workspace chat and videoconferencing that integrates with Office 365.

"*I think also for the better. I mean, I think it was COVID that actually helped really drive and push everybody into this virtual space and these virtual meetings, and really showing us that we're able to work together, but not necessarily be together.*" ***M&C Saatchi Abel***

"*We've adapted to design remotely. There's a lot of use now on, for example, tools like Figma to Showcase -- so the emergence of Figma has been, wow, I didn't see it coming, considering we used it a lot before. And when I was choosing a prototyping tool, I said, "No Figma is, no. We'll choose something else. […] And Figma has just suddenly become this tool for remote design workers.*" ***VMLYR***

"*We've seen Scrum as the new discussion, right? It's the new way of work. We've seen creative teams talk about Sprints. So, I'm loving the fact that the way the coders used to work in their secret little societies are now becoming the way the cool kids are working in the rest of the organisation.*" ***VMLYR***

4.3.5 Intensified collaboration

The industry's response to the challenges of shrinking work and the need for expertise in unfamiliar areas of marketing led to greater online collaboration with freelancers who work remotely. The results indicated that agencies could now more confidently solicit work outside South Africa's border. Agencies with international ties took advantage of these resource networks, making innovation and experimenting with new ideas more accessible. Local agencies, as well as freelancers, were now able also to provide services to global agencies and earn foreign currency. The literature review revealed insufficient academic work around intensive international collaboration within the IMCD industry.

"So to give you an example, we have quite a big client that -- they're a global client, but they're also a local client, and we have partners who are experts in certain fields in the United States, who we've met through various Teams calls or global kind of -- I guess they're like forums, global forums, and workshops. We've met them. Now we know they are experts, so we've roped them in." ***Ogilvy***

"But one of the biggest kinds of positive impacts, I'd say, is before COVID, there was a bit of anxiety and fear around working with global clients as well as global partners, just thinking about the fact that, "Okay, well, we're in South Africa. We can work with Ogilvy in the United States, but they are seen as the world leaders in terms of design." ***Ogilvy***

"So, our creative director, [inaudible] creative director currently sits in [inaudible] when we are based in Cape Town, which means that she needs to create opportunities to feel connected to other designers and creative teams. We've got a copyrighter who works in Uganda. Yeah. She moved back home." ***99c***

"We were running pan-African and multinational pitches at the same time, which meant working across many different territories and time zones using primarily Teams and collaboration technology tools." ***Grey Advertising***

"A number of my ex-colleagues are now fully remote working for agencies in the United Kingdom, and they're being paid in pounds, and they don't ever have to go into the office. So, it's quite interesting, the shift that it's, I guess, made in our industry, in this country, and globally." ***Ogilvy***

4.4 Association for Communication and Advertising (ACA)

The ACA became aware of the study through its members' participation and indicated their intention to collaborate to benefit from its findings. Although initially not a formal part of the study, the decision to interview the ACA chairperson would be valuable in obtaining a credible perspective of the IMCD industry in South Africa during the lockdown. The discussion covered several topics, including the two research questions. Care was taken to isolate this discussion from the interviews conducted by Dehrmann to avoid any bias or undue influence on the feedback.

According to the ACA chairperson of South Africa,[16] its members account for 80% of the IMCD industry advertising spend. The lockdown impacted industry revenue and caused a dramatic decrease in media spending as clients reacted to the uncertainty of trade conditions, with declines in the hospitality, tourism, beverage, cigarette, and petrochemical industries resulting in cost containment measures such as salary cuts, cancellation of office rentals, and retrenchments (Interview 6 December 2022). The actual financial impact of this is yet to be established. Although not linked to the thematic analysis of the study, insights were highlighted in the interview, such as the shift from traditional media spend (TV, radio, print) to digital, the pressure on staffing such as retrenchments and business support, the lag in technology adoption, and the gap in skills. Staff members in the IMCD industry were expected to diversify their skill set and become more versatile to save businesses, with the conversation around re-skilling ongoing since the early 2000s. While some people could re-skill themselves and adapt to the changing economy, others were directly affected and did not have the

[16] Karabo Songo was the chairperson of the ACA during 2022/2023 and a non-executive director at Brave Group. He is no longer the chairperson of the ACASA.

time to re-skill. It became evident that the industry had to adapt, particularly around working hours and business location. Organisations with a broader mix of clients fared better than those with more niche clients in travel, tourism, and food, beverages and entertainment industries. Many large and medium-sized businesses were able to weather the storm due to their client mix and flexibility. The lockdown became an opportunity to engage international clients, driven by the flexibility of technology and the fact that many agencies locally had their head offices abroad. Locally, South African-based companies took advantage of the strong exchange rate and serviced offshore clients. Many local clients used the opportunity to diversify from their traditional markets, such as banking, to explore telecoms, allowing IMCD organisations an opportunity to do more work. The interview revealed a surge in digital services, particularly online and handheld devices, and the marketing innovations communicated through these channels with an increasing emphasis on mobile marketing, building communities around brands, and integrating multiple platforms. Overall, the industry had proven itself as a value-adding partner during the lockdown, focusing on finding innovative solutions while demonstrating value to clients. Overall, the discussion confirmed the themes that emerged from the study, supporting the results. The feedback from the ACA chairperson reiterated what many of the respondents in the study were saying.

"So, the first thing that we saw when going through the March 2020 COVID area was a huge decline in media spend." ***ACA chairperson***

"So, there was a large loss of income because pretty much a majority of the mechanisms that can be used to communicate messages to consumers suddenly came to a halt. So, when they did come to a halt, I mean, everything from experiential, shopper promotions, everything that required customers to be out of their household had come to a halt which then had a trickle-down effect." ***ACA chairperson***

"One thing that was pretty interesting, even though you may think it was 2020, a lot of companies were not technologically inclined already to shift their operations completely to online. I think it did take a while for a number of companies to be -- I mean, it took months." ***ACA chairperson***

"We had a whole entire three-story building full of physical desktop machines. So, you have to change those machines with the same processing power and workability into laptops. It's a huge capital cost." ***ACA chairperson***

"So, what then began to happen is that they saw their productivity levels drop because the resources working from home were less productive." ***ACA chairperson***

"So as employers, we must be able to realise that can we inquire and check with those particular individuals if they are okay at home and, etc. I mean, it was so many new dynamics of corporates having to be more considerate about the home situation of many employees." ***ACA chairperson***

"Some companies chose retrenchment as a way forward. So, your biggest bill in any professional services business is usually your people and resources. Some companies focused on all the other additional savings, all the other additional requirements. Negotiating with landlords, negotiating with all types of service providers in order to save money, and drive your teams to be more productive so that you can balance off the offset of the loss of revenues across clients." ***ACA chairperson***

"But a majority of the organisations are in the middle where they are saying three days necessary in the office. Two days, you can work from home." ***ACA chairperson***

"We had a lot of laggards in the system where people were just violently opposing technology." ***ACA chairperson***

"The other thing that's also going to be an interesting trend – and we'll see how it balances out – is the local and international access to work opportunities." ***ACA chairperson***

"And then of course, the last trend that we're seeing is just South African-based companies servicing only offshore clients to take advantage of your exchange rate." ***ACA chairperson***

"So, with regards to growth sectors, obviously, digital ballooned massively. So digital continues its growth. And I just think that this [COVID-19] just made it bigger." ***ACA chairperson***

4.5 Discussion

The findings reveal an industry forced to be resourceful and resilient under challenging circumstances, meeting these challenges on a case-by-case basis. The type and nature of the organisation played an influencing role in the measures taken in response to the lockdown. IMCD organisations that specialise in digital marketing fared better, with some suggesting growth. Respondents providing above-the-line services faced either work

cancellation or budget cuts as outdoor, print, and television demand dropped. The respondents indicated that they were not adequately prepared for the lockdown's impact on their businesses but did endeavour to adapt quickly to avoid the financial collapse of their organisations. However, most senior managers suggested they were much more robust, wiser and more resilient by the time they came out of the lockdown period. As discussed previously, several themes were expected, and inferences could be drawn from these themes.

The IMCD industry was compelled to re-evaluate its management style to be more altruistic, acknowledging humans' vital role in pursuing the bottom line. Management style and leadership can be identified as significant factors that influence the survivability of the organisation. The results recognise the need for leadership to be more flexible, innovative, and honest in its approach to its clients, staff, and suppliers, pulling on aspects of management style that were not prevalent before the lockdown. Organisations that were to some degree hybrid or virtual/online were partially prepared for the operational functionality of navigating the lockdown but were forced to accelerate and refine the adoption of virtual within their business operations.

Personal growth of staff and management was essentially the order of the day, with trust playing a vital role as employees worked in isolation, free from direct management and accountability. Employees were expected to be self-motivated and self-manage, sometimes under very trying conditions. Cost containment and the acceptance that office space was essentially there to keep the organisational culture meant that most respondents opted for a hybrid approach after the lockdown. The acknowledgement that creatives who were traditionally schooled and not exposed to digital communication until later in their careers (digital immigrants) felt more pressure adapting to technology, as opposed to creatives who started their communications careers in a period where digital communication was the norm (digital natives), meant that agencies were more likely to assess this when hiring new staff. Agencies with stronger technological orientation and service offerings were more likely to grow and succeed going forward, noting the opportunities this would offer in terms of inter-staff and supplier collaboration and access to clients outside South African borders. A strong technological orientation meant being more competitive financially as well as creatively.

The lockdown can be summed up as an opportunity for the growth, repositioning and retooling of methods, processes and service offerings. It also could be viewed as a litmus test for organisational sustainability, quality of management style and leadership, and human resource

management, with the impact of the lockdown either forcing organisations to close or make a plan. Adaptability, flexibility, and trust became key human factors regarding accountability and productivity.

"And we're not requiring people to be there 9:00 to 5:00. It's a case of coming in for a couple of hours, people chatting, having a coffee, the teams who are working on specific projects reviewing together, commenting, making the necessary adjustments. And we'll still have our Teams meetings. For example, I had one in the car earlier. So, it's made that easier in terms of the relationship being trustworthy via a tech perspective. But you still need face-to-face trust as the basis. And I think that's important, where face-to-face becomes the basis, and then tech allows you to then go into the various directions because it's just about getting to know the person and how to respond and about reading the room almost." ***Havas***

"I think the single biggest thing that we learned and carried through this period was resilience and adaptability. If you don't just look at COVID on its own, but you look at all the other things that were happening to us at the same time, like the floods and the violence and the oil prices and supply chain issues and all those good things or not so good things, we had to just roll with the punches. Every day was a challenge. Every day was something different. And I think that the companies that look forward and look for growth and look to fight through it actually come out far stronger than pre-COVID times." ***Grey Advertising***

"There was a massive burden on the leadership and the management of the business to carry people, checking up on them on an ongoing basis. Huge emotional burden as well in terms of calling people, consoling them, etc., etc., looking after them. So, I think what helped us navigate that period is definitely our people function, our talent function, and the management that looked after the general staff. But because of that, it's kind of a management overhead that travels upwards. It was the core leadership team that carried a large chunk of the burden of the agency, keeping the operations moving while everybody was dealing with their own personal issues." ***Grey Advertising***

"Look, I think that thing is going to live with us forever and I guess -- yeah, I think the world is trying to recover and figure itself out, and I think we were no different as an agency in terms of kind of coming out of it. And we definitely look different, I think, as a world, and as a society, and stuff. And I think, yeah, I don't think anybody's got the answers, to be honest. It's the big reset." ***King James***

"And I think especially for us, for the core management team, it did bring us closer together and it did make us work better together and understand each other a bit more." ***Murmur***

“But I could say from a VML perspective, if you had to ask are we better off, I'm not sure, right, because I think we sacrificed some growth. But we won some big accounts in that process, and we won some accounts smartly and we reacted smarter. And are we more productive? There's a belief that says yes.” ***VMLYR***

“You can't have the same old command and control environment that is normally kind of built into the late '40s, early '50s operational management styles with this new way of work, because the employees that embrace this new way of work need a new way to be motivated, they need a new way to be communicated with.” ***VMLYR***

Chapter 5. Summary, conclusion and recommendations

5.1 Introduction

The COVID-19 pandemic took everyone by surprise, with global news indicating the presence of a fatal flu-like illness stemming from Wuhan, China (Page, Hinshaw & McKay, 2021). As COVID-19 spread, the realisation was that this regional health crisis was spreading globally, shutting down airports, cities, ports, and public facilities. Hospitals would have to upscale to treat the sick and save lives. The world would have to wake up to the fact that it would need a global response, that 2020 would not be an average year, and that life would not return to pre pandemic norms.

As a business owner in the IMCD industry, it became clear from the day that the lockdown was announced in South Africa that the lockdown would impact my livelihood and the sustainability of my business. Through this lens, I was moved to uncover how the rest of the IMCD industry was impacted during the lockdown and their response to mitigate these impacts. I was curious about what would and would not be collateral damage, what would and what would not work, and I tried somehow to make sense of it all. The lockdown had a noticeable impact on how, when, where, and what people bought and how information would be distributed and consumed, impacting industries, employees, and marketing professionals in the South African IMCD industry.

So it began; armed with hand sanitisers, masks, and gloves, we had to face the fact that we would have to work, learn, and live in a dystopian world of isolation. It dawned on us that we would be forced into isolation and be expected to work still, cook, clean, eat, rest, and maintain and run households. All this while maintaining mental and physical health. This chapter provides a summary of the chapters, conclusions and recommendations for future study.

5.2 Summary of chapters

Chapter 1 orientates the study around the COVID-19 pandemic lockdown's impact on the IMCD industry, the socio-economic conditions of a hard lockdown and the consequences of long periods of human isolation. The chapter introduces the study's aim and objectives. It investigates the economic conditions during this period, delving into the effects of the lockdown on work-life boundaries and consumer and buyer behaviour, and seeks to identify the measures the IMCD industry took in response the pandemic.

Chapter 2 The literature review used the following keywords to search for resources: COVID-19, consumer/buyer behaviour, employee well-being, technology, social media, business management, and workplace productivity. The literature review accessed the Tshwane University of Technology's Library & Information Services, information, references on networking sites (ResearchGate, Academia.edu, ScienceDirect), and search engines (Google and Google Scholar). The literature reviewed included scholarly articles in published journals covering health, business management, information management, marketing, retail, and consumer services, as well as comments by industry leaders. The literature on the COVID-19 pandemic primarily featured health and wellness, focusing on policy, capacity building, and governmental health responses. Articles also covered business resilience and impacts on education, marketing and sales, consumer and buyer behaviour, and technology. A gap existed around the lockdown's impact on the IMCD industry and the industry's response, especially within the South African context. The literature review was synthesised into five key themes as directed by the pilot study and comprised a cohesive summary of existing knowledge in the field. The five themes are:

- The impact of the lockdown on the South African economy
- The impact of the lockdown on consumer and buyer behaviour, the internet and social media
- The impact of the lockdown on human wellness
- Impact of the lockdown on working from home
- Impact of the lockdown on business resilience.

Chapter 3 focused on the study's methodology, outlining how the data was collected to meet the study's objectives. The chapter details the population, sample, and method of data collection, as well as addresses any data quality and ethical concerns that may have occurred during the study. The qualitative case-based study was conducted through online one-on-one interviews with permission to record the discussion (audio) before the interview commenced. To mitigate potential bias, Gerald Goslin was contracted to set up the appointments, and Anneke Dehrmann was contracted to conduct the interviews. The reason for using independent research assistants was to avoid confirmation bias (Peters, 2022). Of the 45 organisations selected from the Advertising and Communications Association of South Africa, 15 organisations (18 interviews in total[17]) agreed to do the interviews.

Dehrmann began the interview by introducing herself, describing the process and then posing the following two open-ended questions:

[17] Consent from 15 organisations, yielding 18 positive responses (two responses from Grey Advertising and two responses from Ogilvy. One from the chairman of ACA).

- How did the COVID-19 pandemic lockdown impact your business?
- What did you do to adapt to the changing circumstances, and why?

Dehrmann used follow-up questions to get better clarity and probe deeper for more detail, taking care not to lead the participant.

The professional transcription service TranscribeMe! was then commissioned to transcribe the interviews. The transcripts were emailed back to the interviewees for validation. ATLAS.ti automated the collation of transcripts into themes, allowing for a consistent, unbiased data collation. The analysis identified five organising themes within the *impacts* of the lockdown, namely client revenue, staff well-being, technology, operational management, and productivity. The analysis also identified five organising themes within the *response* to the lockdown. These are client/agency re-evaluation of relationships, adapting or repositioning service offerings, more focus on human capital as an asset, deeper immersion of technology in productivity, and intensified collaboration. The study was delimited to the South African IMCD industry, selecting the Association for Communication and Advertising South Africa (ACASA) as the representative body within the IMCD industry in South Africa. All the respondents chose non-anonymity, providing validity and credibility to the data.

Chapter 4 focuses on the study's results and deals in detail with the impacts and measures in response to the lockdown by the IMCD industry. The transcripts were analysed manually, guided by the themes identified in the pilot study done for DEFSA, with further themes emerging as the data was collated. The results were grouped into variables and key themes. Various inferences were made and synthesised with the literature review, providing insight into the impact and measures the IMCD industry took in response to the lockdown. The study identified five themes impacting the IMCD industry: client revenue, staff well-being, technology, operational management, and productivity. The study also identified five measures the South African IMCD industry took in response to the impact of the lockdown: client/agency re-evaluation of relationships, adapting or repositioning of service offerings, more focus on human capital as an asset, deeper immersion of technology in productivity, and intensified collaboration. The findings reveal an industry forced to be resourceful and resilient under challenging circumstances. The lockdown can be summed up as an opportunity for growth, repositioning, and retooling of methods, processes, and service offerings. The lockdown became a test bed for organisational sustainability, business resilience and empathic human resource management. Adaptability, flexibility, and trust became key human factors regarding accountability and productivity whilst operating remotely and in isolation. The results recognise the need for leadership to be more flexible, innovative, and honest in its approach to its clients, staff, and

suppliers, drawing on aspects of management style that were not prevalent before the lockdown period. The results also include an interview with the chairperson of ACA, providing corroboration and affirmation of the results.

Chapter 5 concludes the study by discussing the results with recommendations for further study. These recommendations include investigating methods, strategies, and theories to positively exploit technology to enhance internal and external business relationships (partnerships) and stimulate creative engagement for a healthy organisational culture. The recommendations suggest exploring new and creative methods to direct service offerings whilst profitably engaging clients to foster greater trust. Defining hybrid working hours, hybrid work environments, and remuneration, while fostering mental and physical well-being for more significant human capital management. Further studies are recommended on the collaboration between industry and design education to best adapt and prepare future employees to function within a hybrid work lifestyle, including new creative skills to address potential growth areas in the industry.

5.3 Conclusion

The purpose of the study was to identify the areas in the South African IMCD industry affected by the COVID-19 pandemic lockdown to determine its impact and the measures the South African IMCD industry took to respond to these impacts. The population of 45 members of the Association for Advertising and Communication of South Africa was approached, and 15 organisations, totalling 18 interviews, were recorded and transcribed. Two questions were posed: Which areas in the IMCD industry were affected by the lockdown, and what was its impact on the industry? Moreover, what was the IMCD's response to these impacts? Through the responses, common themes were identified, and by critically analysing them, I was able to conclude the following:

The results revealed five thematic areas around the lockdown's impact on the South African IMCD industry, which served the travel, alcohol, and entertainment services industries. Above-the-line and direct marketing agencies were hit by shrinking media spending as budgets were either cut or rationalised. The shrinking budgets had a knock-on effect on IMCD industry revenue that, in turn, impacted human resources in relation to salary cuts and retrenchments. The human toll on lockdown was most felt by employees forced into isolation, with the results indicating challenges around mental and physical health. The blurring lines between home and work life affected productivity and agency culture, disrupting production times and creative quality.

Furthermore, the realities of the pandemic brought home the dependence on stable internet services, on capable hardware and software, and on support, which hit the bottom line financially. The rapid adoption of technology and invasive online meetings brought about poor boundary setting for staff and management, forcing creatives and management alike to work longer hours. Meeting fatigue became an all too familiar experience.

The results also indicated some positives, such as increased digital online spending on creative and media placement, with digital agencies best positioned to take advantage of this. The other impact that can be noted is that agencies were forced to adopt technology faster than they intended to, forcing employees who had not adopted technology previously into steep learning curves. Operationally, IMCD organisations faced steep austerity measures, forcing cuts on rentals and office services. Those hit by these cuts included cleaners, drivers, and non-core services. Management felt the impact on these employees, who took salary cuts to save jobs.

The impact of the lockdown on the IMCD industry had similarities to other organisations in other industries, particularly employee wellness, productivity, and rapid adoption of technology. The most significant differentiation between other industries was how creative energy could be infused and managed whilst being isolated and separated from traditional in-person group-based brainstorming sessions. The brainstorming process relied heavily on in-person sessions, with staff spontaneously feeding off each other's ideas, and with lockdown, this was not the case. What also became apparent was how these ideas would need to be shared with clients whilst online and in isolation, especially as traditional methods involved face-to-face encounters where body language and room “energy” could guide the client's adoption of a creative idea.

The study revealed five thematic areas around the IMCD industry's measures in response to the lockdown. The impact of lost revenue due to budget cuts led agency management to review how they would engage their clients. Measures such as renegotiating fees, restructuring billing models, and re-evaluating campaigns allowed the agencies and clients to operate without shutting their doors. Clients faced similar challenges of revenue decline as consumer and buyer behaviour shifted. Adopting a partnership or business symbiosis meant that organisations could weather the storm and draw closer together, solidifying and strengthening business loyalty after the lockdown.

As a catalyst, the lockdown compelled organisations to review their service offerings, operational structures, talent management, and cost containment strategies. The lockdown drove organisations to harness and improve their

dependencies and efficiencies on technology, ideation processes, production, and overall operational accountability. According to Seetharaman (2020), an opportunity exists to digitise a business or search for an alternative business model to expand business prospects. Davison (2020) explores the transformative potential of disruptions, examining their nature and how these transform current practices to better levels for the individual and institution, learning to celebrate these rather than lament them. Competition within the communications industry is fierce, primarily through periods of transition like a pandemic. When the dust settles, the actual economic value of the industry's response will become the final arbiter of its success (Porter, 2001). Remote work allowed agencies to exploit global networks to shore up foreign exchange earnings, increasing revenue and weathering the storm through the financial backing of their large media holding companies. The lockdown drove online global collaboration, sharing resources, and mobilising ideation to meet rapidly changing marketing conditions. The lockdown also stimulated the local freelance market, allowing creatives to earn foreign exchange through these global networks.

The results highlighted the strategic importance of human capital and human capital management. Organisations within the IMCD industry survived through the innovation and resourcefulness of senior managers, who daily approached their challenges, constantly adapting and improving on workable solutions. Moreover, without the support of dedicated, motivated and inspired employees, the efforts of senior managers would have been in vain. The challenges of isolation, limited peer-to-peer and supplier engagement, and blurred home-work life meant that organisations needed to find creative ways to keep the energy and agency culture alive. Online social sessions, Dad Joke Competitions, and even free ice cream days helped to encourage co-worker cohesion and remind employees that they were not alone and were part of a larger entity. Senior managers displayed resilience, empathy, and leadership, putting people above profits and themselves, often bringing in therapists to provide the necessary support and direction, all keys to long-term sustainability, organisational wellness, and business sustainability.

The COVID-19 pandemic was a watershed moment for self-reflection as an individual, a manager, and a professional. The pandemic was unexpected and unprecedented and had devastating social and economic effects. The theory of Black Swan events is described as an unexpected, unprecedented occurrence with deep and wide socioeconomic impact that comes as a surprise, has a significant effect, and is often inappropriately rationalised after the fact with the benefit of hindsight. In the book *Fooled by Randomness: The Hidden Role of Chance in Life and the Markets*, Nassim

Nicholas Taleb (2001) describes these events as having a significant effect on society, are high profile, hard to predict, and occur accompanied by high levels of uncertainty. It could be argued that the COVID-19 pandemic lockdown was a Black Swan[18] event and that steps should be taken to learn from these events to future-proof the IMCD industry.

In self-reflection, I found that many of the respondent's claims, challenges, situations, and comments were experienced first-hand by my organisation within the IMCD industry. I can infer that the COVID-19 pandemic has shown that human well-being and creative culture should be preserved and nurtured during pandemics. Nurturing would be done by exploiting technological advantages and driven through resourceful, resilient, and courageous leadership. My findings indicate that the IMCD industry will not return to its pre-lockdown ways, developing a more robust organisational culture empowered by technologies and the humanities. Creative energy cannot exist in a bubble and requires the infusion of various catalysts, ideas, cultures, and perspectives. The pandemic stress tested this.

5.4 Recommendations

From the findings of the study, it is recommended that future investigation be made into methods, strategies, and theories that will exploit technology to enhance internal and external business relationships (partnerships) and stimulate creative engagement whilst promoting a healthy organisational culture. As such, it is recommended that further studies involving creatives be conducted to investigate which technologies are present or could be innovated to achieve this in the future. Such technologies must also improve the speed and quality of creative artwork whilst remaining close to current trends and future developments. They must also support greater accountability and productivity whilst working in a hybrid way. Such technologies should encourage a healthy balance between home and work, fostering mental and physical well-being and supporting staff retention. A further study involving health professionals and staff would help identify present and future technologies and best human resource practices to achieve this.

This study also recommends that IMCD organisations explore new and creative methods to direct service offerings whilst engaging with clients and remaining profitable. Such methods should encourage and foster greater trust between client and organisation and between employee and employer. I would also recommend exploring and normalising new and creative revenue management methods within the IMCD industry to secure future business sustainability should another large-scale event occur.

[18] The term 'Black Swan' refers to probability of seeing a black swan on a lake noting their rarity. Its sudden appearance would be considered random, improbable, and surprising.

Furthermore, this study recommends that human capital management be developed to define hybrid working hours, hybrid work environments, and remuneration, while fostering mental and physical well-being. Innovative hardware and software solutions should be explored with the intent to be more adaptive and mobile whilst employee roles and responsibilities be redefined to suit a hybrid working style best and allow new incumbents to slot easily into agency life. New and creative methods should be developed within the education framework to address this next normal and allow continuous learning programmes to be developed for employees to address these challenges. I also recommend further studies on how industry and design education can collaborate to adapt best and prepare future employees to function within a hybrid work lifestyle. This would include new creative skills to address potential industry growth areas.

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