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Zimbabwean communication agencies: Current state and future prospects

ABSTRACT

Researchers from various countries have studied the practices of communication industries worldwide. Despite this nexus of study, relatively little research has been done on the practice of communication in Zimbabwe. In order to contribute to the understanding of the state of the communication industry on the African continent, this study reports on the results of a survey of 50 Zimbabwean communication agencies. This article is different from other studies on the communication industry because it focuses at an institutional level across the agencies, rather than at the level of individual practitioners. The findings focus on four main topics, namely practitioner profile, agency profile, prevailing professional practices and practitioners' views on future industry trends. The research indicates that the Zimbabwean communication industry is vibrant despite the economic and political challenges facing the country. Owing to economic challenges and stiff competition, most agencies are multipurpose in nature and provide a wide variety of communication and creative services to their clients. The agencies provide services such as advertising, graphic design, branding, website development, event management, video production, online marketing, media relations, mobile app development, and even animation. There is a growing trend to use digital platforms of communication, yet radio and print (magazines and newspapers) remain essential communication channels. Among social media platforms, Twitter, Facebook and YouTube are the most used by practitioners in Zimbabwe, while online audio-podcasts, blogging sites, crowdsourcing and Linked-in are less popular. Practical issues are addressed regarding information about how agencies have adapted (or can adapt) to the new ways of strategic practice with clients in order to keep up with the changing Zimbabwean market. This research also provides valuable insights into the communication industry as a whole. It explores possible opportunities and threats for communication practitioners presented by economic and political environment issues and suggests directions for further research in this area.

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INTRODUCTION

As the level of global complexity increases, communication agencies around the world have a growing need for knowledge of African viewpoints. While there may have been significant research into the communication industry in various contexts, various challenges of the contemporary world may have implications that should not be transferred without empirical data – including practitioner profile, agency profile, prevailing professional practices and practitioners' views on future industry trends. This is predominantly because the Zimbabwe business landscape cannot be equated to other landscapes, which necessitates a unique context.

There is a growing interest in understanding public relations and communication trends and practices around the world. Several studies have been conducted profiling the global and regional communication industry (see Global Communications Report 2016; Zerfass, Moreno, Tench, Verčič & Verhoeven, 2017; Ki & Ye, 2017). Africa is clearly underrepresented in these studies. For instance, Ki and Ye (2017:240) indicate that only a handful of articles on public relations in Africa was published in PR *Review* between 2001 and 2014. Most research on the communication industry in African countries originated from South Africa (Ki & Ye, 2017) with some notable contributions from other countries, such as Nigeria (Ibraheem, 2014; Koper, Babaleye & Jahansoozi, 2009; Olatunjii, Akhagba & Laninhun, 2016), Ghana (Wu & Baah-Boakye, 2014), Kenya (Kiambi, 2014; Kiambi & Nadler, 2012; Mbeke, 2009), Uganda (Natifu, 2014), Egypt (Ayyad & Farouk, 2014; Keenan, 2009) and Gabon (Oksiutycz & Enombo, 2011). Considering that there are 54 countries on the African continent, the state of the communication industry in many African countries remains largely unknown. This cross-sectional quantitative study examines the profile of the communication industry in Zimbabwe based on the data collected from 50 communication agencies operating in the country's capital, Harare. The study aims to ascertain empirically the current state of the communication industry among marketing, advertising, public relations and communication agencies in the country.

The objective of the study is to provide insights into the communication industry in Zimbabwe by outlining practitioner profile, agency profile, professional practices and practitioners' views on future industry trends, thus contributing to the body of knowledge about the communication industry Africa. In the following section, we give a definition of the communication industry and consider the importance of communication agencies in the Zimbabwean context. The remainder of the article outlines the study's methods and our results. Finally, we discuss the results and the study's limitations, areas for future research, and the contribution of this research to a wider disciplinary perspective of the global communication industry.

1. DEFINING THE COMMUNICATION INDUSTRY

Communication constitutes the founding principles for any form of social life. It enables the exchange of ideas and processes for both individuals and organisations, for the realisation of their goals. Until the last twenty years or so, studies and research work devoted to organisational and strategic communication had remained marginal. Richmond, McCroskey and Powell (2013:20) define organisational communication as “the process by which individuals stimulate meaning in the minds of other individuals, by means of verbal and nonverbal messages in the context of a formal organisation”. Marketing Advertising and Communication South Africa (MAC SA, 2016) considers communication to include the broader marketing, advertising, public relations, communication and research industry. To obtain a better understanding of the industry to be studied, we refer to different sorts of agencies, in particular those of advertising, public relations and communication as marketing vehicles in all media, including digital platforms. This is due to the overlap in meaning, which is a reflection of a dynamic and complex industry.

For the purpose of this study, the term “communication industry” is used to refer to the ecosystem of marketing, advertising, public relations and communication agencies in a specific country. Hence, the communication industry is responsible for communication use in all media platforms, and practitioners work with communication in its entirety. We excluded in-house communication departments from this research. We follow the approach used by the Global Communications Report (2016:61) and describe the communication industry as that which is involved in “all activities in which an organisation engages to strengthen its relationship with any public or stakeholder group”. Such a broad approach is also supported by previous studies, which noted a trend towards the convergence of public relations, marketing communication and corporate communication (Christensen, Morsing & Cheney, 2008; Global Communications Report, 2017; Hutton, 2010; Cornelissen, 2011; Hallahan, 2007; Oksiutycz & Azionya, 2017). The main driving forces behind the blurring of disciplinary lines between different communication specialisations is the ever-increasing role of digital communication (Scott, 2009) and the strategic drift in the communication industry (De Klerk & Verwey, 2013). Public Relations, also termed strategic communication management, gains different meanings in different contexts. The different meanings of PR are embedded in the nature of the current communication practices in organisations and society in general (Hallahan, Holtzhausen, van Ruler, Verčič & Sriramesh, 2007:11).

2. THE IMPORTANCE OF COMMUNICATION AGENCIES

Agencies are the core of the communication industry globally. Based on the definition of an advertising agency developed by MAC SA (2016:4), we define a communication agency as a company or an enterprise whose core business is the conceptualisation, creation and production of communication to foster the relationship between an organisation and its stakeholders. The communication industry structure consists of full-service agencies, creative boutiques, digital or interactive agencies, in-house agencies and media specialists, as well as direct marketing and database agencies, e-commerce agencies, sales promotion agencies, event-planning agencies, design firms and public relations firms (O’Guinn, Allen & Semenik, 2015).

There is conflicting evidence about the prospects of growth in the industry. On one hand, the Global Communication Report (2016) forecasts a 30% growth in agency business. On the other hand, Quebra, Bick and Abratt, (2013) see the proliferation of media and messaging as a threat to the traditional agency business. Clients are now questioning the role of agencies, the bundle of benefits that they offer and their associated costs, which means that traditional mass media and revenue streams suffer (O'Guinn et al., 2015). New channels have empowered the connected generation of consumers. This has given rise to the greater power of consumers, being able to control advertisements against marketers' interests (Lane, King & Reicher, 2011). Although agencies have responded by reinventing their roles and service offerings, this has not yielded the intended success (O'Guinn et al., 2015).

The focus of the agencies has expanded from a concentration on increasing sales and media coverage to a more strategic process that includes building the image, reputation, and brand of an organisation; developing an integrated communication strategy; supporting cause-related marketing; influencing policy and decision making; and establishing engaging relationships with multiple stakeholders (Lane et al., 2011). Lodge (2011) notes that in South Africa, the industry has experienced the biggest change seen over the last decade, where full-service agencies are fractioning into smaller specialist agencies. The author argues that small "jack of all trades" agencies are more likely to respond to the changing environmental conditions while big specialist and larger full-service agencies often face global or hierarchical sign-off challenges and cannot respond quickly to the clients' needs.

3. ZIMBABWE – ECONOMIC, POLITICAL AND SOCIETAL CONTEXT

Communication agencies' practices depend on the environment in which they exist. Sriramesh and Verčič (2001, 2009) argue that the communication industry is shaped by a country's infrastructure (political system, legal system, economic development, and the level of social activism), media environment (media control, outreach, and access), and societal culture. We add the importance of the country's historical legacy to this mix.

In the years 1997 to 2008, Zimbabwe experienced deep socio-economic and political crises (Mawoyo, 2012:115). The country was facing enormous problems of a political, economic and social nature. The economy shrank by 40% in eight years (Biti, 2009, 2012). Among the main political issues were the series of flawed elections and the suppression of the opposition movements. Although political and economic changes introduced post-2008 brought some prospects of political and economic stability (Bertelsmann Stiftung's Transformation Index, 2016; Mawoyo, 2012), the Zimbabwean economy is still weak, its civil society repressed, and the media largely under the control of the ruling elites – all of which has negative consequences for the communication industry.

The government dominates media space through the state-owned Zimbabwe Newspapers Pvt Pty (1980), which controls seven major national and provincial daily and weekly newspapers (Chari, 2011), as well as the broadcasting landscape in Zimbabwe, through the Zimbabwean Broadcasting Corporation (Mudavanhu, 2014). In 2016, Zimbabwe recorded significant growth in mobile subscriptions and internet penetration (MISA-Zimbabwe, 2017).

3.1 The development of the communication industry in Zimbabwe

As in other countries, public relations and marketing in Zimbabwe followed separate development paths. The Rhodesia Public Relations Institute was founded in 1966, although the origins of PR in Zimbabwe can be traced to the mid-1950s (Mawarera, 2014). According to Mawarera (2014), the main professional activity of public relations professionals in the early days was around organising corporate events and handling companies' publicity. After independence, the institute became the Zimbabwe Institute of Public Relations (ZIPR) and was very active in the 80s and 90s. It had as many as 300 members, mainly working as in-house practitioners (Mawarera, 2014). However, the economic crisis that gripped the country at the turn of 21st century adversely affected the activity of the Institute. The ZIPR offers a professional diploma qualification in public relations, which is the only public relations qualification in the country. Currently, no Zimbabwean university offers public relations as a full qualification; instead, PR can be taken as a minor subject within media studies, human resources, communication or business courses (Muchena, 2017). A study of public relations practitioners by Muchena (2017) revealed that in Zimbabwe public relations practitioners often "migrated" to PR from other disciplines, mainly journalism and media studies. They engage in both technical and strategic functions in that they provide strategic advice to management, perform events management, crisis management and environmental scanning, research and evaluation.

In contrast, all three public universities in Zimbabwe offer either undergraduate or postgraduate degrees in marketing, alongside several diplomas and certificate courses taught by private colleges and industry associations. One of the most prominent professional organisations is The Zimbabwean Advertising Research Foundation (ZARF), established in 1997, which conducts independent market research in advertising and media (ZARF, 2016). The Marketer's Association of Zimbabwe (MAZ) was founded in 2007 in Harare as a response to the perceived lack of recognition of the profession in the country and the need to facilitate the development of the profession in the country (MAZ, 2017).

4. RESEARCH METHOD

A cross-sectional survey design was chosen for this study. This design was necessary for it enabled researchers to document the prevalence of particular characteristics in a population. It offered the opportunity to assess relations between variables and differences between subgroups in a population, such as communication practitioners. The sample frame was drawn from all listed advertising agencies found in the Zimbabwe Advertising Research Foundation, advertising agencies and services on Zimbabwe websites and the Facebook for Business page. Although the name suggests that the focus is on advertising, in reality, the researched companies offer a variety of communication services, which makes them fall within the target population. Participating organisations varied greatly in size, scope of services offered and ownership. Some of the agencies are the subsidiaries of multinationals, including Barkers Oglivy, TBWA, FCB Zimbabwe, Columbus and Jericho. Most of the agencies are Zimbabwe-owned, with their head offices and most of their operations based in Zimbabwe.

The sample of 50 agencies was selected from more than 100 companies listed on the ZARF website (2016), the website listing advertising agencies and services in Zimbabwe (Advertising Agencies in Harare, Zimbabwe, 2016; Advertising Agencies & Services in Zimbabwe, 2016 and Facebook for Business page, 2016). In circumstances where the agencies no longer operated or were based outside Harare, the next one on the list was contacted until the count of 50 agencies was reached. The sample included a mix of different agencies in terms of their size and services offered. The purposive heterogeneous sample was chosen among practitioners from the selected agencies. The criteria for inclusion were as follows: the respondents were formally employed by the selected organisations and have been working in the communication industry for at least one year. We also sought to represent a broad spectrum of communication specialisations. Saunders, Lewis and Thornhill (2003:172) state that heterogeneous samples are useful when attempting to identify key themes. To increase the response rate, the interviewer made personal contact with the practitioners working for the identified organisations. Respondents filled out the questionnaires while the researcher was on standby to respond to queries. Some respondents preferred to complete the questionnaires at their most convenient time and requested the researcher to collect the completed questionnaire at a later date.

The questionnaire was designed in accordance with the research objectives. The main objective of this study was to examine Zimbabwean communication industry practices. The study describes communication agencies in the country. It also tries to predict, based on the practitioners' views, the future trends in providing communication services. The questions werebased on insights obtained through a literature review (Global Communication Report, 2016; Moreno, Zerfass, Tench, Verčič & Verhoeven, 2009). Previous studies identified profession, country context, industry, organisation and individual as the levels of variables influencing professional communication practice (Muchena, 2017; le Roux, 2014). The questionnaire contained four sections: practitioner profile, agency profile, communication practices and future trends. The responses were collected between March and May 2017. Data were analysed using IBM Statistical Package for the Social Sciences (SPSS) 24 software for descriptive statistics and Principal Component Analysis (PCA). Non-parametric tests of significance (Chi-square tests) were conducted for "use of media channels, platforms and tools", "perspective on communication industry" and "services driving growth in the next five years". The Bartlett's sphericity test and the KMO index (Kaiser-Mayer-Olkin) were used.

5. RESULTS

5.1 Sample profile

The sample (see Table 1) consisted of 52% male and 48% female respondents. Overall, 92% of the respondents were between 25 and 55 years of age Most participants (98%) had a tertiary educational qualification as undergraduates (50%), post graduates (36%), doctorates (2%) and certificate or diploma holders (10%). More than half of the respondents (see Table 1) obtained their qualification locally in Zimbabwe (60%), one third in South Africa (34%) and some (6%) in the UK.

Almost half (48%) of respondents indicated having specialisations in marketing followed by those (30%) who specialised in communication. A small number of respondents (10%) reported that their specialisation was business management, some (4%) coming from journalistic and law (2%) backgrounds. Most (43%) of the respondents had worked in the industry for 1 to 5 years, followed by those who had spent 6–10 years in the industry (37%) and those who had more than 11 years (20%) in the industry.

A third (34%) of the respondents identified their job level as strategic, while a quarter (26%) were executives and another quarter (26%) were managers. Only a few (14%) of the respondents identified themselves as practitioners. More than half (61%) of the respondents indicated that their work experience ranged from 1 to 5 years in their current position. Only a quarter of respondents indicated that they had occupied their current position for 6 to 10 years. Fourteen percent had more than 11 years of experience.

Table 1: Profile of the respondents

Variable		*n*	%
Gender	Male	26	52
	Female	24	48
Age	18–24 years	4	8
	25–35 years	33	66
	36–55 years	13	26
Education	A level	1	2
	Diploma	5	10
	Undergraduate degree	25	50
	Master's degree	18	36
	PhD	1	2
Place where diploma/degree was obtained	Zimbabwe	30	60
	South Africa	17	34
	United Kingdom (U.K.)	3	6
Area of specialisation	Communication	15	30
	Marketing	24	48
	Journalism	3	6
	Business Management	5	10
	Public Relations	2	4
	Law	1	2

Years in the industry (industry tenure)	1–5 years	22	43
	6–10 years	18	37
	11+ years	10	20
Job level	Strategic	17	34
	Executive	13	26
	Managerial	13	26
	Practitioner	7	14
Length in the current position	1–5 years	30	61
	6–10 years	12	25
	11+ years	7	14

The question of how professional skills were acquired was a multiple-response question (total percentage will therefore exceed 100%). A significant majority of respondents indicated that they had obtained their expertise through on-the-job training, formal education and short courses rather than formal in-house training (Figure 1).

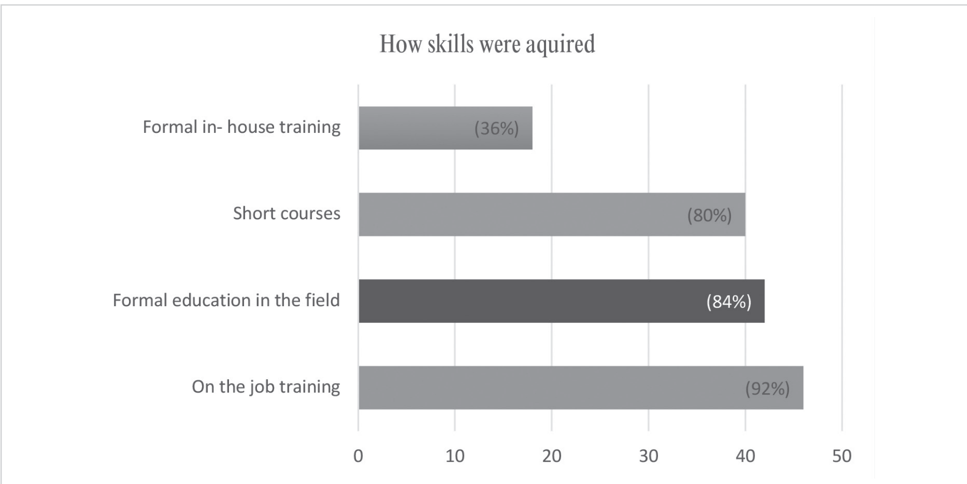

Figure 1: Acquisition of professional skills

5.2 About the agency

This section asked questions about the size of the agency, the length of time it had been in business, its client base and the gender composition of its employees. More than half (52%) of respondents had 11–20 employees followed by 21–50 (32%) employees (see Figure 3). A few respondents said that their agency had fewer than 10 employees (8%) or 51–100 (8%) employees in their organisations.

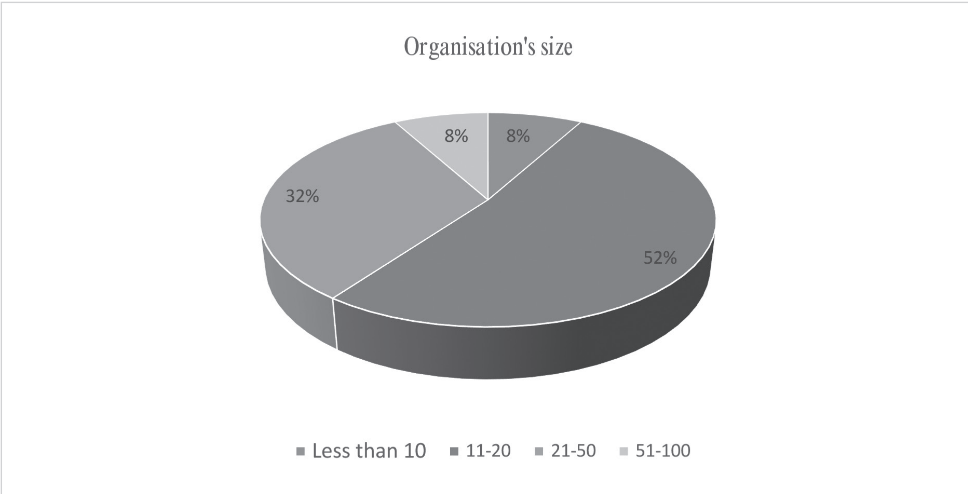

Figure 2: Number of employees in the organisation

As shown in Figure 3, 36% of respondents indicated that their organisations had been in existence for 11 to 20 years, followed by those who had existed for 6–10 years (24%), 11–20 years (20%), over 20 years (16%), and a few which had practised for less than 2 years (4%).

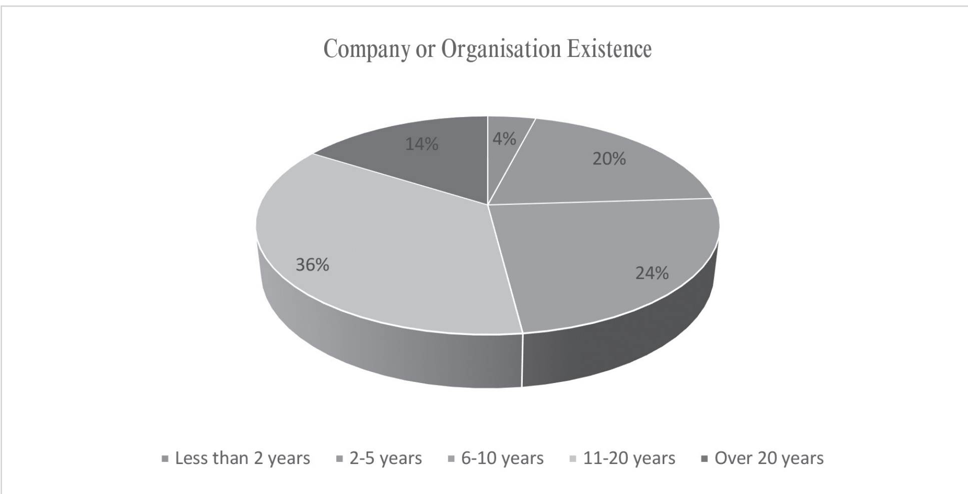

Figure 3: Number of years the company has been in existence

As shown in Figure 4, there is no significant distinction observed in gender parity. This is different from other countries, where data on the respondents' gender for the corporate communication profession in South Africa, for example, reflect that the industry is predominantly female (le Roux & Naude, 2011; le Roux, 2014), while in Gabon the PR industry is male-dominated (Oksiutycz & Enombo, 2011). In contrast, a Nigerian study discovered that female professionals are often found occupying lower-level jobs and female professionals believed that there were more male employees in agency operations (Olatunjii et al., 2016:182).

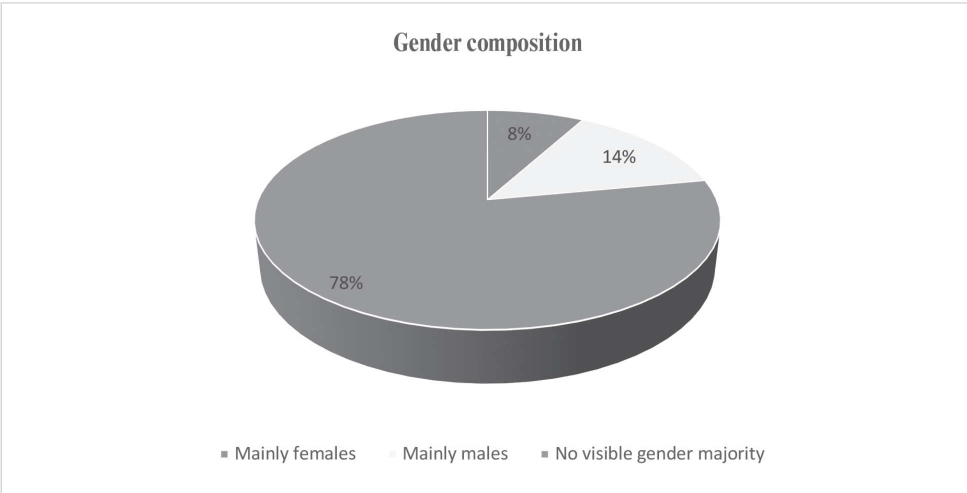

Figure 4: Gender composition of agency employees

In this multi-response question (total percentage will therefore exceed 100%), the respondents were asked to indicate their type of client, with most respondents (68–90%, see Figure 5) indicating a mixed clientele. The main client base of the agencies was comprised of companies dealing in fast-moving consumer goods, followed by service businesses, retailers and wholesalers, non-governmental organisations (NGOs), educational institutions, financial institutions and tourism organisations.

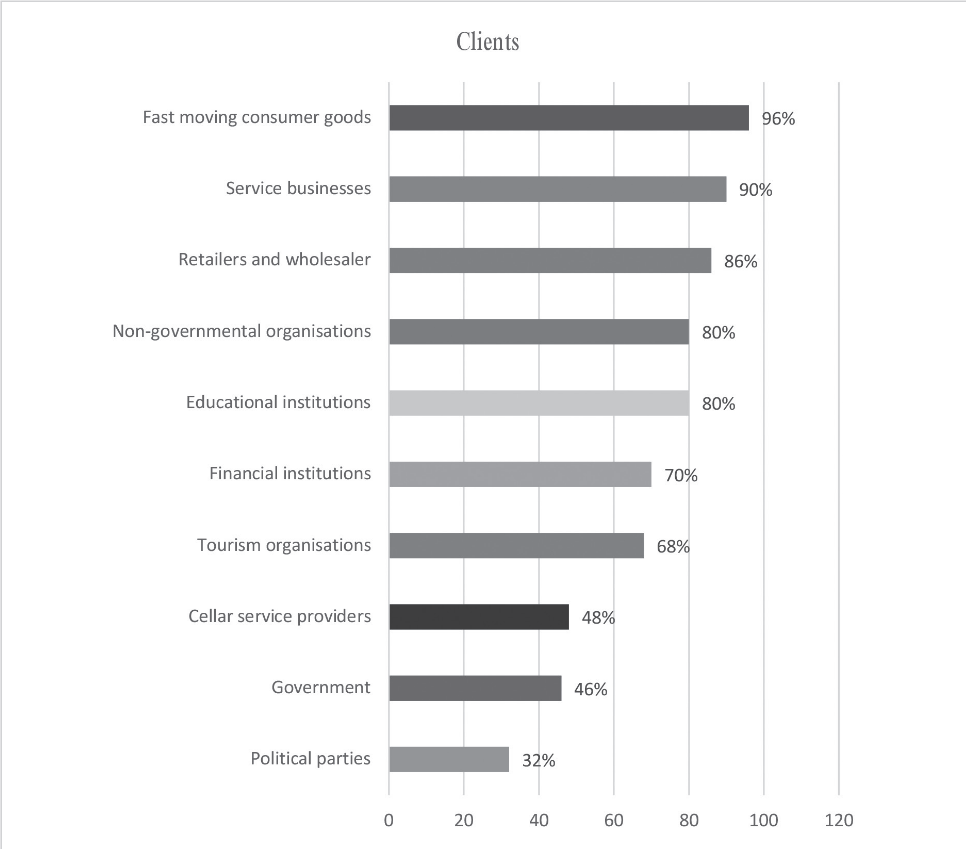

Figure 5: Agency client base

5.3 The professional practice

This section sought answers to the questions on the types of services the agency provides, and the respondents' perceptions about the reasons why clients seek their professional services and media choices.

The question about the types of services agencies (Figure 6) were providing was a multiple-response question (total percentage will therefore exceed 100%). When indicating their services, more than half of the respondents (68–98%,) confirmed that their company provided services in advertising, graphic design, branding, website development, event management, video production, online marketing, media relations, mobile app development, and animation (see Figure 6). A few respondents (8%) indicated that they provided photographic studio services and 7% indicated that they offered both PR and research. The low percentage of PR services is an intriguing result considering that the traditional specialisms firmly associated with public relations, such as media relations and crisis communication, obtained scores of 68% and 48% respectively. Clearly, the respondents perceived public relations as not being related to these activities.

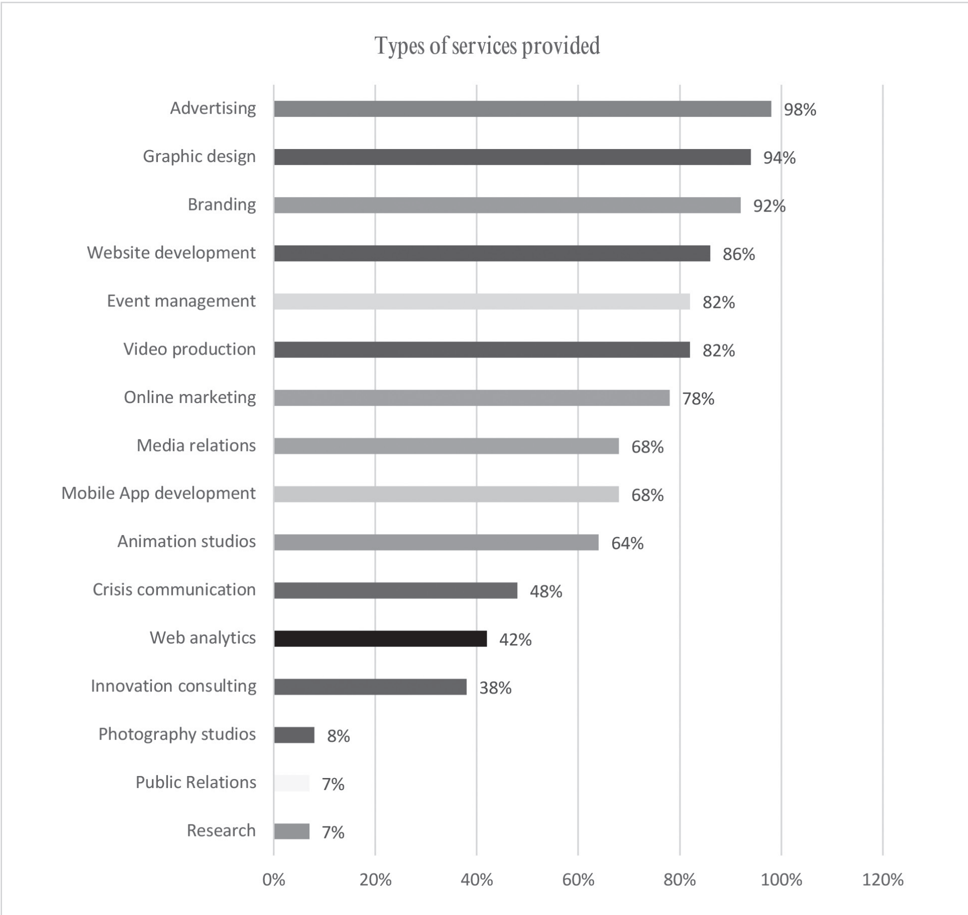

Figure 6: Types of services provided by the agency

When asked about why they believed their clients chose their agency (Figure 7) most respondents shared the view that strategic insights (98%), creative thinking (98%), expertise in brand communication (98%), expertise in digital and social media (60%) and cost effectiveness (30%) in comparison with the hiring of internal staff were the main drivers for seeking agency services.

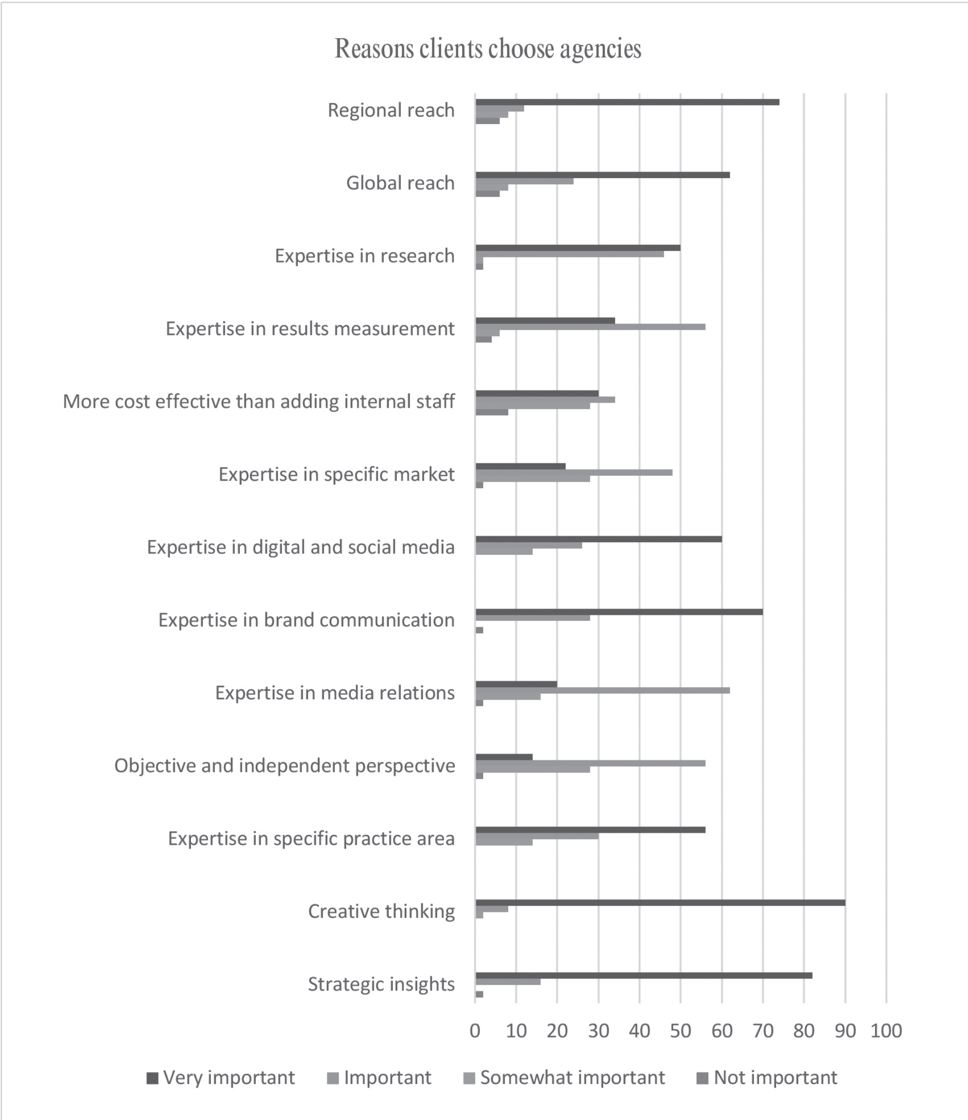

Figure 7: Reasons clients choose the agency

Table 2: Reasons clients work with the agency

Important reasons clients work with agency	Minimum	Maximum	Mean	SD
Creative thinking	0	50	3.88	0.385
Strategic insights	0	50	3.78	0.545
Expertise in brand communication	0	50	3.66	0.593
Regional reach	0	50	3.54	0.885
Expertise in digital and social media	0	50	3.46	0.734
Expertise in research	0	50	3.44	0.644
Expertise in specific practice area	0	50	3.42	0.731
Global reach	0	50	3.42	0.883
Expertise in results measurement	0	50	3.2	0.728
Expertise in media relations	0	50	3	0.67
Expertise in specific market	0	50	2.9	0.763
More cost-effective than adding internal staff	0	50	2.86	0.948
Objective and independent perspective	0	50	2.82	0.691

The results suggest that communication practitioners believe that their agency's creative thinking is the most significant point of attraction for clients (Table 2). This is followed by strategic insights, expertise in brand communication, regional reach, expertise in digital and social media, expertise in research, expertise in a specific practice area and global reach.

Respondents were asked to indicate the media used to communicate on behalf of their clients in a multi-response question (total percentage will therefore exceed 100%). Figure 8 shows the importance of digital media communication: a large number of respondents often communicate on behalf their clients using Twitter (86%) and Facebook (78%), followed by YouTube (78%). Traditional media, in particular print newspapers (76%) and print magazines (66%), retain their prominence in Zimbabwe. This shows that social media is certainly gaining substantial traction. The relatively weak performance of broadcast media may be attributed to the fact that Zimbabwean media are state-controlled and therefore advertisers and publicists avoid them. Also, with the major social platforms like Facebook and Twitter opportunities, the Zimbabwean communication agencies are simply climbing on board.

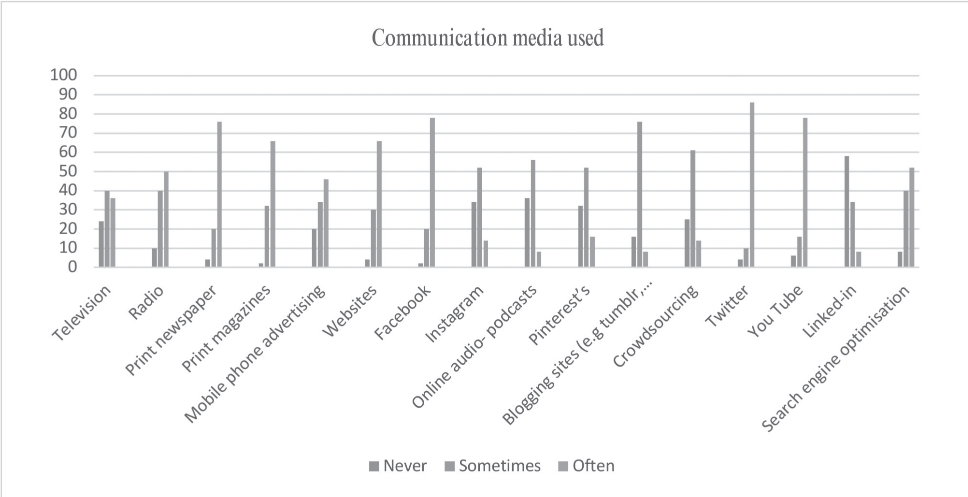

Figure 8: Use of communication media

Table 3 shows Chi-square statistical test results for the total scale of 16 items. Therefore, with $p < 0.05$, there is a statistically significant relationship between the variables. The *p*-value in the Chi-square output is $p = 0.000$. This implies that the relationship between variables for agencies use of media channels, platforms and tools is significant.

Table 3: KMO and Bartlett's test for use of media channels, platforms and tools

Kaiser-Meyer-Olkin measure of sampling adequacy.		0.734
Bartlett's test of sphericity	Approx. Chi-square	388.672
	Df	120
	Sig.	0.000

As depicted in Table 4, the key drivers of growth in the next five years are perceived to be brand reputation management, sponsorship, social media content management, content creation, customer relations management, digital media analytics, internal communications, campaign measurement and evaluation.

Table 4: Important services in driving growth for your agency in the next 5 years

Services driving growth for your agency in the next 5 years	Minimum	Maximum	Mean	SD
Brand reputation management	0	50	3.88	0.328
Sponsorship	0	50	3.72	0.64
Social media content management	0	50	3.7	0.614
Content creation	0	50	3.68	0.551
Customer relations management	0	50	3.68	0.551
Digital media analytics	0	50	3.5	0.614
Internal communications	0	50	3.44	0.541
Campaign measurement and evaluation	0	50	3.4	0.67
Executive/management communication	0	50	3.32	0.844
Research	0	50	3.26	0.6
Paid media	0	50	3.18	0.661
Media relations	0	50	3.12	0.627
Investor relations	0	50	3.04	0.669
Community relations	0	50	2.96	0.605
Corporate social responsibility	0	50	2.96	0.605
Government relations	0	50	2.92	0.752
Special events	0	50	2.9	0.614
Product marketing	0	50	2.86	0.7
Crisis communication	0	50	2.76	0.797
Issues management	0	50	2.76	0.687

A statistical Chi-square test was used to compare observed results with expected results. In all tests of significance, if $p < 0.05$, there is a statistically significant relationship between the variables (Pallant, 2010). The p-value in Table 5 Chi-square output is $p = 0.000$. This means that the relationship between scale levels for the 10 items (reduced from 13) is significant for a general perspective on the communication industry in Zimbabwe.

Table 5: KMO and Bartlett's Test for perspective on the communication industry

Kaiser-Meyer-Olkin measure of sampling adequacy.		0.639
Bartlett's test of sphericity	Approx. Chi-square	35.861
	Df	10
	Sig.	0.000

5.4 Perspectives on the future of the industry

In this section, the respondents were asked two questions: one about the activities, which will drive growth in the next five years, and a second question about the challenges facing the agencies in the near future.

On the question of services that will drive growth in the next five years, almost all respondents believed that brand reputation management, internal communications, content creation, customer relations management, digital media analytics, sponsorship, research and campaign measurement and evaluation will be very important in the next five years (Figure 9). In addition, aspects such as corporate social responsibility, media relations, community relations, issues management, government relations, research, special events and investor relations were seen as important to the growth of the industry.

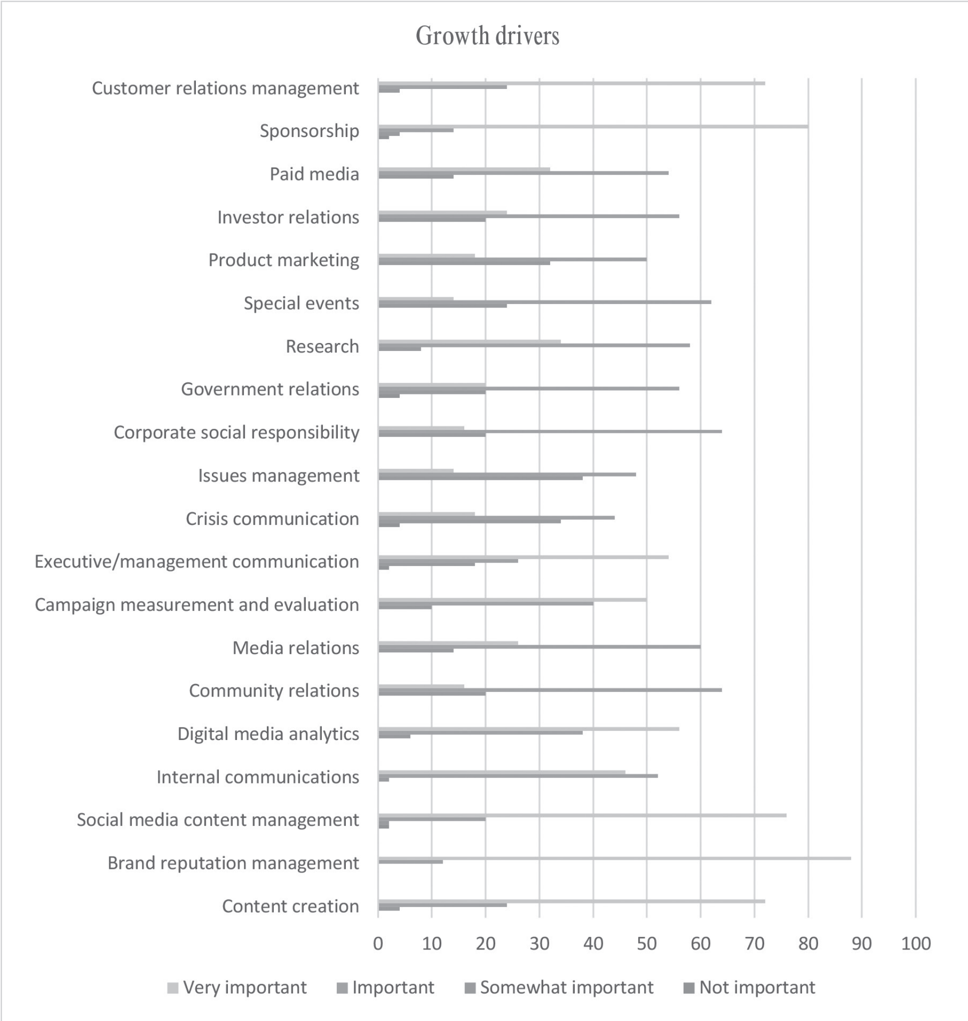

Figure 9: Industry growth drivers

It is noticeable that most respondents viewed economic challenges as having a prominent impact on growth (see Figure 10). Competition within the industry is fierce, based on creative ability, range and breadth of services and market insight (le Roux & Naude, 2011). Around a quarter of respondents pointed to the liquidity crunch as a serious threat to industry growth and associated with it budget cuts by the clients (19%). Adequate skills of employees were a moderate concern for the respondents (17%).

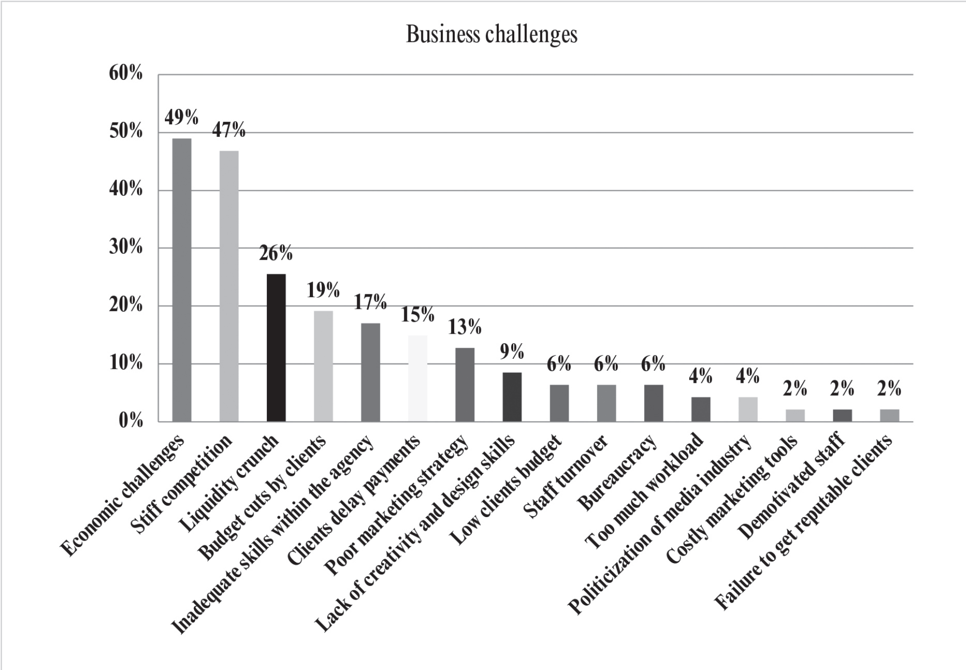

Figure 10: Challenges facing communication agencies

As can be seen in Table 6, a Chi-square test yielded statistical significance for the total scale level for the 20 items $p = 0.000$ ($p < 0.05$). This means that the relationship between services that will be important in driving growth for agency in the next five years is significant.

Table 6: KMO and Bartlett's test for services driving growth in the next 5 years

Kaiser-Meyer-Olkin measure of sampling adequacy.		0.564
Bartlett's test of sphericity	Approx. Chi-square	158.491
	Df	66
	Sig.	0.000

6. DISCUSSION

The objective of the study is to provide insights into the communication industry in Zimbabwe by outlining practitioner profile, agency profile, professional practices and practitioners' views on future industry trends. The study indicates that the communication practitioners in Zimbabwe are well educated, with the vast majority holding a degree either in communication or in marketing. This supports the assertion that Zimbabwe is one of the best-educated countries in Africa. There seems to be no gender bias among communication practitioners in Zimbabwe as female and male practitioners are equally represented among the employees of the agencies surveyed.

Unlike in South Africa where, according to le Roux (2014:192), many large agencies offer training for their employees to obtain the appropriate skills, in Zimbabwe in-house training is limited, but not absent, since around one third of respondents received such training. Most of the surveyed practitioners quoted formal education and gaining expertise through practical experience as the main source of their professional skills. This supports the findings by Muchena (2017) and le Roux and Naude (2011) that many practitioners acquire specific communication-related skills through experience. However, this study does not support the notion that the main reason for this is the absence of formal training in communication (Muchena, 2017), public relations or marketing communication. The need for upskilling can be explained by a rapidly changing environment, where the rate at which new approaches, techniques and audience preferences emerge far outpaces the rate at which the relevant training is introduced to formal education. The changing media and technological environment is another factor contributing to the pace of change.

Owing to economic challenges and stiff competition, most agencies are multipurpose in nature and provide a wide variety of communication and creative services to their clients. The agencies provide services such as advertising, graphic design, branding, website development, event management, video production, online marketing, media relations, mobile app development, and even animation. There is a growing trend to use digital platforms of communication, yet radio and print (magazines and newspapers) remain the essential communication channels. Among social media platforms, Twitter, Facebook and YouTube are the most used by practitioners in Zimbabwe, while online audio-podcasts, blogging sites, crowdsourcing and Linked-in are less popular.
These practices are influenced by the needs of clients, global trends, the media habits of the audiences and the social and economic conditions of the country. The main groups of agency clients are fast-moving consumer goods manufacturers, service businesses, retailers and wholesalers, non-governmental organisations (NGOs), educational institutions, financial institutions and tourism organisations.

Competitive conditions and a difficult economic climate pose a threat to the development of the communication industry. This research indicated that over half of the surveyed agencies had been in existence for 11–20 years or more. On one hand, considering the fact that the Zimbabwean economy has declined significantly in the past 20 years, the continuity of many agencies reflects the resiliency of these agencies and the success of adaptive strategies applied by them. At the same time, there is an indication that there are fewer new entrants in recent years (only 4% of the agencies were formed in the last two years), which can be considered a threat to the growth of the industry.

The Zimbabwean communication industry is making strides in embracing emerging approaches to strategic communication. This is in contrast to Preciado-Hoyosa, Nivia-FlórezaJuan and

Correales-Rivas (2017), who discovered that the communication professionals' practices in Colombia make them behave as press agents, more than strategists. The public relations agencies' service, as it is designed, is destined to be strategic, because these firms are focused on helping organisations to improve in the performance of their duties, to anticipate the future and to respond in a timely manner and successfully to the demands of the environment (Preciado-Hoyosa et al., 2017). The findings demonstrate that, according to the respondents, brand reputation management, internal communications, content creation, customer relations management, digital media analytics, research and campaign measurement and evaluation will drive the communication industry's future. These are the strategic functions commonly identified in other studies (Onyiengo, 2014:109; Preciado-Hoyosa et al., 2017). At the same time, a suite of tactical services such as product launches, sponsorship, event management and media relations and even animation were also indicated by the respondents.

Only 7% of respondents considered themselves to be practising public relations. This could be explained by the educational background of the respondents and the lack of specialised public relations, corporate communication or strategic communication courses offered by the country's tertiary education institutions. Most of the respondents have marketing and general communication studies degrees, where PR is perceived as a marketing support function with a very limited scope of activities or as an in-house communication function. Nevertheless, the results further support the worldwide trend towards breaking boundaries between marketing communication and public relations. The types of strategic communication activities performed by communication agencies in Zimbabwe are in line with other country-specific studies (Muchena, 2017) and global studies (Global Communication Report, 2016).

7. LIMITATIONS AND FUTURE RESEARCH

As with any research, the study has some limitations that offer opportunities for future research. The study provides an analysis of the practice of communication agencies without paying specific attention to the tools or tactics used by practitioners. Secondly, the study researched a limited number of communication practitioners in Harare. A larger sample, which could also include the in-house communication departments, would be beneficial for the better understanding of the communication industry in Zimbabwe. Future research could consider exploring in depth the skills and competencies of Zimbabwean practitioners to broaden the understanding of their practices across the country.

8. CONCLUSION

This study contributes to the body of knowledge on the communication industry in Africa. An understanding of the industry characteristics and practice in one country complements and contributes to the wider disciplinary knowledge about the global communication industry as a whole. By collecting country-specific empirical data, this first comprehensive research of the communication agencies provides insights into communication industry practice in Zimbabwe by focusing on the practitioner profile, agency profile, communication practices and future industry trends. The results indicated that Zimbabwean practitioners are well educated and come mainly from communication and marketing backgrounds, with no obvious gender majority. The Zimbabwean industry is dominated by local agencies but some multinationals are also present. The respondents identified brand reputation, the growing importance of digital communication and sponsorship as the main divers for the growth of the industry. The managerial implications for this article are that practitioners should continue to be strategic. This has implications for the professionalisation of communication practice, which should not necessarily follow the same direction as for being mere press agents. In addition, the uncontrollable dynamics of economic and political issues in Zimbabwe mean that it is hard to control everything that is in the external environment. There is a need for agencies to share experiences from each other and consider training opportunities to combat with skills shortages. This survey of 50 agencies has illustrated that the communication industry in Zimbabwe is well established and resilient, even though the struggling economy poses a major challenge to communication agencies in Zimbabwe.

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