

THE ADVERTISING INDUSTRY IN SIERRA LEONE: A CRITICAL AND COMPREHENSIVE ANALYSIS

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1. Executive summary

The commercial advertising industry in Sierra Leone is in a parlous state – unstructured, uncoordinated and unregulated. The shambolic nature of the industry stems from three major shortcomings – a lack of policy regulation, a limited market, and poor professional practices.

Existing policy which exists only at the level of the Independent Media Commission (IMC) - the body tasked with regulating the media, public relations and advertising practices in accordance with the Independent Media Commission Act, 2020 – is limited to ethical considerations. Just one section (Section 4) of the Media Code of Practice is dedicated to the advertising industry.

In the context of the advertising market itself, Sierra Leone has a modest economy with little competition, especially in the private sector. Brand advertising opportunities are few and far between and the government, which is among the leading advertisers in the country, is regarded as a bad debtor, particularly where paying fees to the media industry is concerned. Furthermore, rather than seeking to get value for money, government ministries, departments and agencies are widely suspected of using a system of political patronage and kickbacks when allocating and/or distributing advertising contracts to the media.

The situation is exacerbated by the fact that entering the advertising industry is a free-for-all. Consequently, freelance advertising agents and “briefcase” agencies undercut the rates of registered entities. Also, the absence of an umbrella association such as the Sierra Leone Association of Journalists (SLAJ) is considered to be a serious obstacle in ongoing efforts to coordinate and professionalise the industry.

In terms of professional practice, production standards for advertising are generally mediocre. This is partly due to the fact that many media practitioners, especially those in the electronic media, consider themselves to be advertising professionals. As a result, newspaper pages and radio and TV schedules are saturated with substandard adverts.

Against this backdrop, stakeholders believe that any attempt to streamline the industry should address these three issues as a matter of priority. They are calling for a complete overhaul of existing advertising policy and for a standalone regulation that is informed by a nationwide consultation and that focuses exclusively on the advertising industry. It is believed that having an effective policy will serve to address existing gaps both in the market and the advertising community. Urgent action will help the media industry in Sierra Leone to sustain its operations and, by extension, to help foster democracy and good governance.

2. Introduction

The advertising industry in Sierra Leone is thought to be “as old as the country’s print media” since the first newspaper to be published in Sierra Leone in 1801 was called the Royal Sierra Leone Gazette and Advertiser (Cole, 1995). According to Nicol, the name suggests that the newspaper was

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involved in selling advertising space.

At the present time, advertising is the main source of revenue for the media industry in Sierra Leone and most media houses would struggle to operate or survive without it.

Generally, commercial advertising is divided into three segments: above-the-line advertising (ALA) which is the traditional model used by newspapers, radio and television; below-the-line advertising (BLA) which uses on-the-spot or on-site public performances to promote products and services; and digital communications (DC), which are said to be developing steadily and appeal to corporate clients because they are dynamic in nature, efficient, targeted and smart.

However, in recent years, commercial advertising in Sierra Leone has witnessed a steady decline in all aspects of the industry – ranging from the quality of products to the uncoordinated and uncontrolled nature of the market. This is largely due to the absence of a strong and comprehensive policy framework. The situation has been made worse by the fact that the industry has been flooded with untrained and inexperienced practitioners with dire consequences for quality standards in the commercial advertising sector.

Dennis Streeter, Chief Executive Officer of a leading local advertising agency, expressed concerns that the commercial advertising industry was being partially hijacked by media practitioners and “brief case agents” who operate as full service agencies (FSA), handling all stages of the advertising process including planning, production and ad placements. In addition, they offer media buying services (MBS) – i.e. buying primetime on radio and TV and then selling it to advertisers – as well as performing the role of creative boutiques (CB) specialising in the actual creation and production of adverts. Many clients from the private sector are complicit in maintaining this status quo because they prefer to deal with the media directly instead of commissioning advertising agencies to act as intermediaries.

The consequences of this apparent takeover of the advertising industry are two-fold: first, the “invaders” are said to be undercutting the price of advertising services, thus robbing advertising agencies of the majority of their clients. Secondly, quality control in the industry is almost non-existent, which has resulted in low standards of service.

3. Methodology

The research was impeded by a marked lack of relevant academic literature for review purposes. Consequently, data collection was almost exclusively based on primary sources with key informant interviews used as the main technique. The study included face-to-face interviews with stakeholders in and outside the industry as well as remote engagement with other interlocutors connected to the commercial advertising industry in Sierra Leone.

4. Trends and patterns of commercial advertising

The trends and patterns of commercial advertising in Sierra Leone can be viewed from different perspectives – media market, practice and policy framework. In terms of the media market for commercial advertising which comprises mostly the traditional model used by newspapers, radio and TV, there has been a general decline in advertising revenues, especially for advertising agencies. This is partly due to the emergence of unspecified players including agencies, “sole

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proprietor” agents and media practitioners.

Moreover, in terms of professional practice, the advertising sector has been undermined by chaotic practices and corruption, particularly since the award of advertising contracts is often not based on professional criteria and/or market forces. Instead, these decisions are mainly motivated by personal gain and patronage. Furthermore, there have been no serious efforts to conduct market research by establishing an audit bureau for newspaper circulation and audience ratings that could inform the distribution of adverts on the basis of accepted market practices.

In addition, trends and patterns of commercial advertising have been negatively affected by the fact that the policy framework for the regulation of the industry is grossly inadequate. Existing policy is enshrined in the Independent Media Commission’s Media Code of Practice which is limited to a discussion of ethics rather than the holistic regulation of the industry including the media market. For instance, there is no policy that indicates how the government, the largest public-sector advertiser, should fairly allocate and/or distribute adverts to the media.

4.1. The impact of COVID-19 on commercial advertising

Although the forced closure of many business, albeit temporarily, led to a general decline in advertising revenue, the pandemic has had a mixed impact on the commercial advertising industry, according to Julius Spencer, Managing Director of the Premier Media Company. While the print media witnessed a sharp fall in revenues, the electronic media experienced a temporary boom due to a rise in health-related advertising commissioned by the government and its international and local partners.

Meanwhile, Sebastian Okutu, Chief Executive Officer of Priority Solutions, an international advertising agency operating in Sierra Leone, points out that “below-the-line advertising” took the biggest hit at the height of the COVID-19 pandemic. This was because BLA requires physical contact with prospective buyers of products and services and, therefore, fell victim to public health regulations issued by the National COVID-19 Emergency Response Centre (NaCOVERC). However, there was some uptick in revenue for electronic media using traditional models of commercial advertising and digital communications.

4.2. The impact of social media and Google advertising on the local market

The impact of digital communications on the local market is a divisive topic. Some industry professionals argue that social media and Google advertising are overhyped while others say that global tech companies have made significant inroads into the commercial advertising market.

Those involved in traditional advertising models contend that the impact is minimal because social media platforms are only used by those in the middle to upper income brackets. For example, a recent endeavour by the Premier Media Group Ltd to track online/social media reach for a client suggested that its reach did not exceed 2,000 followers. Although social media footprints are expanding and will continue to grow as more people have access to smartphones and can afford to purchase data, it also seems likely that traditional advertising methods will continue to be the norm for a while.

On the other hand, those involved in non-traditional advertising, such as Sebastian Okutu, believe that the future of advertising lies in digital communications because of their precision, their flexibility,

and their ability to map potential customers based on demographics and lifestyles.

4.3. Non-traditional advertising or sponsorship

Non-traditional advertising or sponsorship relates primarily to digital communications. This mode of advertising is believed to be making steady progress and may well change the face of advertising in Sierra Leone. This is because marketing experts understand that they need to follow their clients, many of whom are increasingly congregating in online social communities. Anecdotal evidence suggest that the number of people who regularly use specific social media channels is growing dramatically and, increasingly, entrepreneurs are leveraging social media to grow their businesses and to build relationships with customers.

Digital communication is one of the simplest, cheapest and most effective ways to gain exposure and to strengthen a company's reputation. But this approach is used for non-commercial goals as well as commercial purposes. For non-commercial activities, advertisers have been able to engage in cost-cutting measures while being able to substantially increase their visibility online. For instance, international non-governmental organisations make widespread use of this approach. However, from the perspective of advertising agencies and the media, there is a risk that a growth in digital communications will eventually erode traditional means of advertising and sponsorships. In short, as suggested by Joshua Nicol, Ag. Head of the Department of Journalism and Media Studies at the University of Sierra Leone, the emergence of non-traditional forms of advertising may be a double-edged sword.

5. Allocation of government advertising: current practices

According to the public relations officer of the Ministry of Finance (MoF), there is currently no policy regulating the distribution of government advertising to the media. In the absence of such a policy and of credible research into newspaper circulation and audience measurement, media scholars believe that the award of advertising contracts is influenced mainly by kickbacks and political patronage. Of even greater concern is the fact that government ministries, departments and agencies often do not honour their financial commitments for advertising services, which end up being written off as bad debts.

6. In-house resources for selling advertising and marketing media products

There are serious challenges in this area. A number of actors in the commercial advertising industry acknowledged that the market is saturated with people who have no professional background in advertising. This is partly due to a long-standing lack of coordination and regulation in the sector, which has led to individuals from various backgrounds, including the media, entering the industry as practitioners/producers. This trend has served to dilute the quality of advertising services. In addition, the media industry lacks the necessary skills, especially at the level of continuity announcers, to handle the broadcast or publication of adverts on air or in newspapers.

7. Third-party audience measurement and research: existing tools and methods

One of the challenges identified by both scholars and practitioners in the advertising industry is the

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absence of credible research.

There is currently no audit bureau of circulation (ABC) and audience ratings that could inform the distribution of advertising according to accepted best practice. Consequently, as Sowa points out, the distribution and placement of advertisements are often driven by sharp practices that include the payment of commissions to public relations officers in private and public sector institutions.

Meanwhile, as Okutu notes, it will be challenging to conduct any serious research aimed at establishing newspaper circulation and audience measurement while most radio and TV stations continue to rely on analogue broadcasting and, therefore, will not be covered by the digital tracking tools normally used to measure audience ratings.

8. Private-sector advertisers and value for money

Here again, opinions diverge. As a rule, private-sector advertisers say they are getting some value for money even if they also want to see improvements in the quality of advertisements placed in print media. One of the largest private-sector advertisers, Mercury International Company, deals with the media directly instead of utilising the services of an advertising agency. Its public relations officer, Alhaji Komba, confirms that the company is satisfied with the performance of the media, especially the electronic media.

However, other major commercial advertisers use different approaches. While Qcell makes use of mainly digital communications and Africell takes a hybrid approach that includes traditional commercial advertising through its own radio station, Afri Radio, Orange employs both traditional and non-traditional methods of advertising and works exclusively through an advertising agency.

9. Policy regulations governing advertising: monitoring and enforcement

As noted above, the absence of a serious policy framework for regulating the advertising industry remains a severe challenge. At the current time, the only existing policy is one section the IMC Media Code of Practice for the regulation of media practice. This section speaks mainly to issues of ethical conduct. Consequently, media practitioners double up as advertising professionals and, in many cases, produce substandard advertising content. In addition, only a handful of advertising agencies are registered with the IMC and, unlike the media community, which has an umbrella association that coordinates and regulates individual media practitioners, the advertising industry has no such representative body. This has led to huge variances in professional standards.

10. Room for improvement in Sierra Leone's advertising sector

Almost all stakeholders in the country's commercial advertising industry agree on the urgent need to improve the industry – in terms of working practices as well as better coordination and regulation of advertising agencies and the wider market. To achieve this, key stakeholders will need to adopt a two-pronged approach – (1) introducing significant improvements in existing policy regulation and (2) delivering sustained capacity-building for both individuals and agencies. In addition, structures for better coordination of the industry need to be put in place.

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10.1. Analysis of key stakeholder institutions or bodies involved in development activities

To improve Sierra Leone's advertising industry, a number of key stakeholders will need to join forces and chart the way forward. The IMC should be at the forefront of these efforts since it has a mandate to regulate not only the media but also public relations practices and the advertising industry, in accordance with the Independent Media Commission Act (2020).

In addition, the IMC will need to work closely with other key stakeholders including the Sierra Leone Association of Journalists (SLAJ), the Independent Radio Network and existing advertising agencies, preferably through an umbrella association.

11. Recommendations

Against the backdrop of the key findings identified under the different subtopics, the following recommendations can be made for enhancing the commercial advertising industry in Sierra Leone:

1. Firstly, there is a need to finalise the revised advertising policy that is still in draft form at the IMC. According to the Executive Secretary of the IMC, a wide-ranging consultation process involving all relevant stakeholders needs to be conducted before a standalone policy on the advertising industry can be validated and subsequently adopted. To that end, the IMC should be allocated funding to complete this process.
2. The IMC should work closely with other key stakeholders in the advertising industry to undertake research through an audit bureau of circulation that will publish circulation figures and audience ratings. This data can then be used to inform the placement of adverts on all outlets using traditional advertising methods.
3. Media institutions should be supported and encouraged to make the transition to digital broadcasting so as to enhance the quality of research and publications.
4. Advertising agencies and individuals within the industry should be encouraged to register with the IMC and measures should be introduced to blacklist or suspend the activities of those which refuse to register.
5. Advertising agencies and individuals wishing to engage in advertising should be encouraged to establish an umbrella association similar to the SLAJ. This will facilitate efforts to introduce regulation, coordination and industry standards.
6. There is a need for the government to adopt a policy that will ensure public sector advertising is evenly distributed among diverse media outlets based on multiple criteria that should include but not be limited to the following:
 - i. Adherence to IMC, NATCOM, NRA and NASSIT requirements;
 - ii. Circulation figures and audience ratings.
7. Advertising agencies should employ staff with the requisite qualifications and professional experience to help address the issues of "social imbalance" and mediocrity as well as other concerns that have plagued the industry for too long.

8. The SLAJ should collaborate with the IMC to ensure that media practitioners do not encroach on the advertising industry as producers. Their role in the commercial advertising sector should be limited to the publication and broadcast of various advertising products.
9. The IMC should work closely with the association of advertising agencies to ensure price protection.
10. IMC policy regulations should ensure that individual advertising practitioners meet certain criteria that include qualifications, capacity and professional standards.
11. The private sector should be encouraged to utilise the services of advertising agencies rather than dealing with the media directly and to commit a reasonable percentage of their media budget to buying in these services.
12. Advertising agencies should closely monitor outputs through the adoption of quality control measures so that advertisers can enjoy proper value for money.
13. The advertising policy should ensure that the rivalry among major advertisers promoting the same products and services, especially telecommunication companies, does not result in media monopolies.
14. The policy should also ensure that public-sector advertisers are required to pay 50 percent of the advertising fee to media institutions in advance.

12. Conclusion

There is significant potential for the growth of the advertising industry in Sierra Leone. That potential needs to be harnessed through a number of reforms on least at three levels – the market, professional practices, and the policy framework. The advertising market needs to be streamlined so that services are provided predominantly by registered advertising agencies and sole agents which should be encouraged and supported to establish a viable association aimed at improving coordination and regulation.

In terms of professional practices, the major stakeholders – the IMC, the SLAJ and advertising agencies – should work together to inject professionalism into the sector and, by extension, ensure better value for money.

In the area of policy regulation, the IMC should be supported in its efforts to complete the process of developing a standalone policy on the advertising industry to replace the existing regulations which are obsolete and inadequate.

Meanwhile, it should be recognised that the disorganised, uncoordinated and unprofessional advertising industry is one of the key reasons for the economic woes experienced by media outlets in Sierra Leone. In this context, improvements to existing operating practices would not only offer life support to the media industry, they would also provide increased employment opportunities and, by extension, contribute to the economic, social, educational and political development of the country.

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