INSIGHT
2027
The state of digital today;
the trend of tomorrow.
digitlab

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About Digitlab

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# Before you start

This report is designed to tell a story, not bury you in data. Every number behind every chart, including those that did not make the final cut, is available in the accompanying Databook.

Before you dive in, there are three things you need to know. Each one shapes how you should understand the findings that follow.

## Effectiveness is scored by the people who use the thing.

When a platform or a content type is scored out of 100, only respondents who use it are included. A channel used by forty organisations and loved by them scores high on a base of forty. It is not dragged down by the three hundred who have never touched it. This is the honest way to read effectiveness, and it is why some scores look higher than the adoption figures would suggest.

## Size is a descriptor, not a finding.

We tested every survey question against company size. Almost nothing separates. Where we report a size difference, it is because the number is interesting, not because it is reliable, and we say so.

## More is not the same as different.

Some groups in this survey simply do more of everything. When a group leads on twelve rows of a chart, the first question is whether it prefers those twelve things or whether it is just running a wider operation. We check that throughout, and in one important case it changes the answer completely.

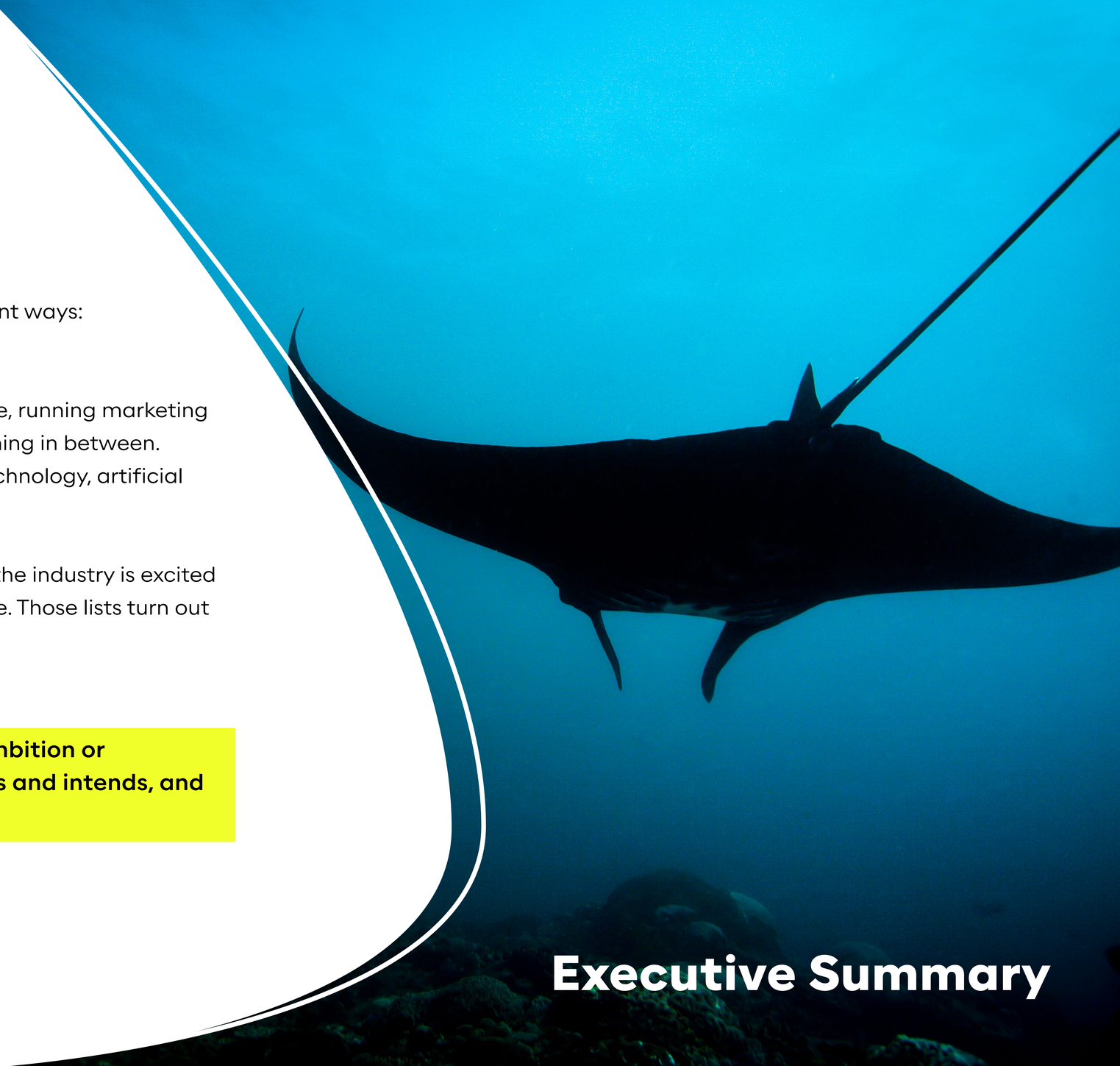
# What we found this year

Every year we ask South African marketers the same thing, in different ways: what are you doing, and is it working?

This is the 2027 edition. 336 people answered, almost all of them here, running marketing for start-ups and family businesses, for listed companies and everything in between. We asked questions about budgets, channels, platforms, content, technology, artificial intelligence, measurement and skills.

We run this research because most marketing surveys tell you what the industry is excited about. We wanted one that tells you what the industry finds effective. Those lists turn out very different, and the gap between them is this year's story.

**South Africa's marketing industry is not short of budget, ambition or technology. It is short of completion. It buys, pilots, explores and intends, and it finishes far less often than it starts.**



## Executive Summary

## The number I did not expect.

Half the organisations we surveyed grew their marketing budget last year, and only 14% cut it, which is a more confident picture than the mood of the last two years would suggest. So I was not expecting what we found when we asked what they had bought with it.

Between them, these over 300 organisations own 2,848 pieces of marketing technology. They told us that 1,143 of those, two in every five, are either not switched on or not delivering anything. That is not our assessment of their stack. It is theirs.

Tools with a single self-contained job land: consent management, ad buying, content management, e-commerce, social scheduling and integration tools that fire on actions between systems.

Tools that only work when something else feeds them, or when a process exists around them, fail: customer data platforms, loyalty, surveys, sales enablement, omnichannel messaging.

## Everybody is experimenting with AI. Very few are shipping it.

If you had asked me to guess, I would have said the organisations with the best data foundations would be the ones experimenting most with AI. They are not. Exploring AI is spread evenly across this market. Strong foundations, weak foundations- it makes no difference to how much people are trying.

Where it makes an enormous difference is whether any of it goes live. Organisations with the strongest data foundations are running 4.7 AI functions in production. Those with the weakest are running 1.3. Same appetite, completely different outcome.

That leads somewhere unpopular.

AI is not a capability you can buy your way into. It is a multiplier on capability you already have, which means that in this market, right now, it is widening the distance between the organisations that are equipped and the ones that are not.

## We are measuring the wrong things, and we know it.

Six in ten organisations told us they track return on investment. One in four told us they can attribute revenue to digital at all.

Both cannot be true in the way we all use the phrase. If only a quarter of this market can see revenue arriving from digital, much of the ROI reported in board packs around the country is estimated rather than calculated. More than a quarter of organisations track none of the six revenue-linked measures we asked about.

What sits at the top of the list instead is reach, engagement and awareness. I don’t argue that those numbers exist, only what they are being asked to prove. They arrive free from the platforms. The measures that would tell you whether any of this is working need somebody to connect one system to another and keep it connected, and that is the work being skipped.

## The gap is widening on its own

This finding stayed with me. We expected the organisations furthest behind to be the ones investing hardest to catch up. The opposite is happening.

Among the least-equipped organisations in our sample, 47% have no plans to build revenue operations, marketing operations or conversion capability within the next two years. Among the best-equipped, 8% say the same. The organisations putting the smallest share of their budget into digital were also the least likely to have grown that budget last year, at 29% against between 51% and 68% in every other band.

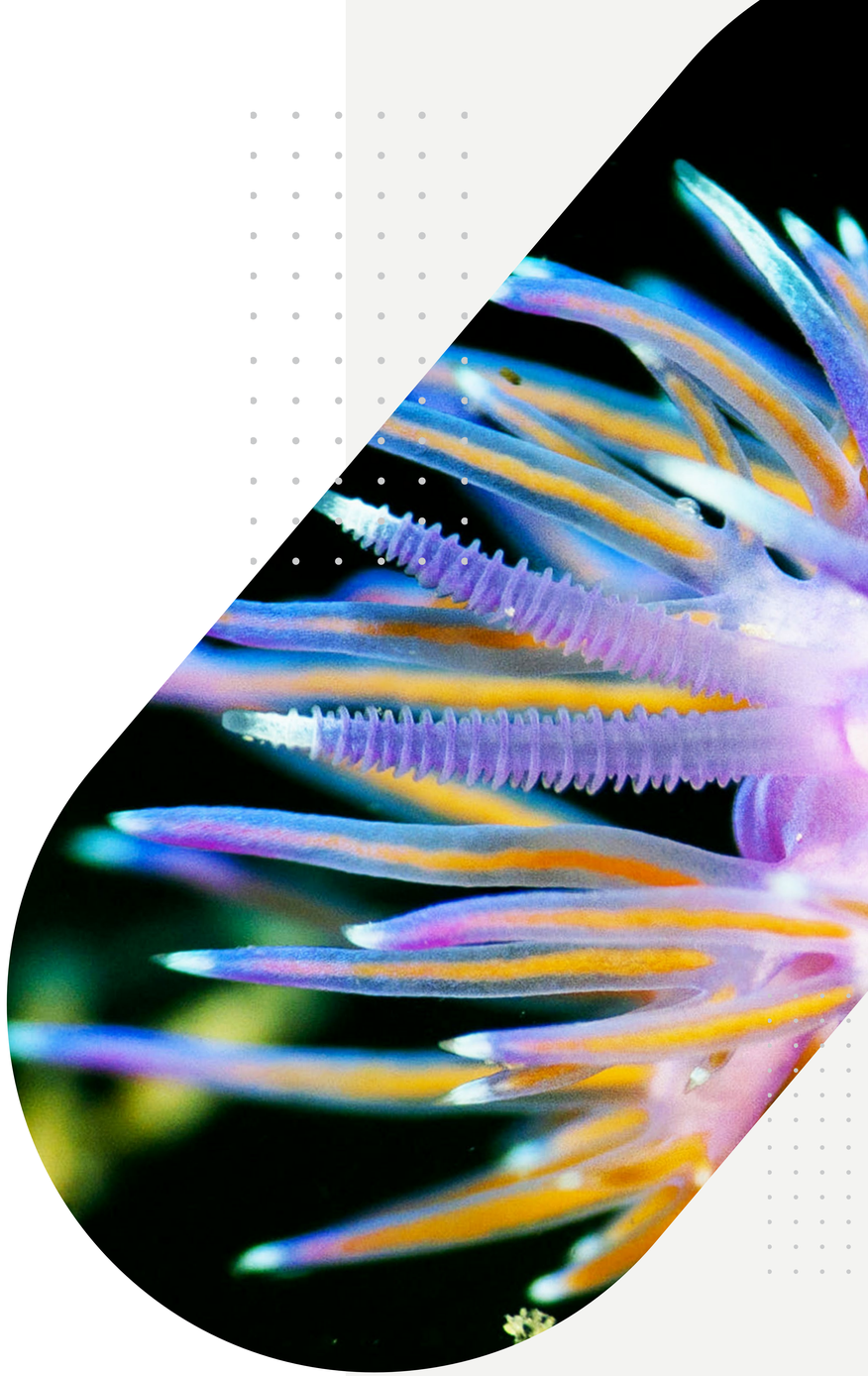
Nothing in this data suggests the distance closes by itself.

## One thing I would change about how we all read this market

Every report in our industry, including the ones we have published before, cuts the market by company size. Small businesses do this, enterprises do that. We tested it properly this year, and it barely holds up: no size band in this survey is meaningfully different from the market average, and start-ups score higher than large businesses.

What separates organisations is how mature they are with data, and how much of the marketing budget they are willing to put into digital. Those two tell you almost everything: what technology is working, whether AI is live, what gets measured, and whether the budget grew. Size tells you almost nothing.

**If you take one practical thing from this research, take that.** Stop benchmarking yourself against companies your size. Benchmark against organisations at your level of data maturity, because that is the group you are genuinely competing with.



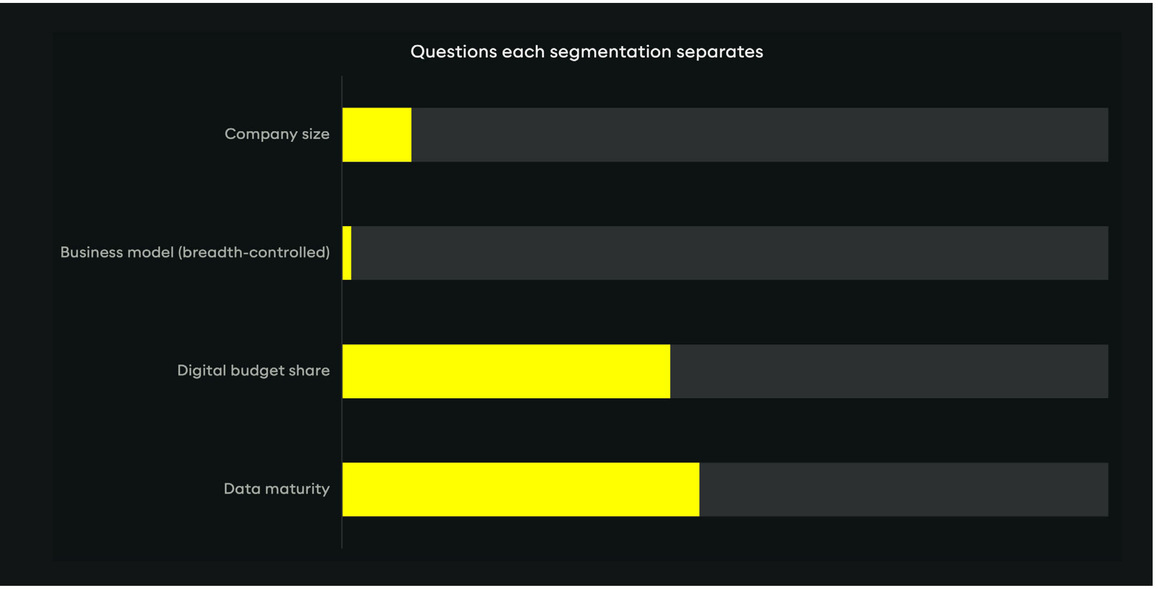
# Where I would start

- Finish something before you buy anything. The next gain for most organisations in this market is sitting in the stack they already own.
- Treat AI as the last thing you build, not the first. It only works where the foundations are already there.
- Make revenue visible, even roughly. Everything else in this data follows from whether an organisation can see what its marketing returned.
- If you sell to other businesses, assume you are behind consumer-facing marketing, because in this data you are. Start with attribution, which drives most of the rest.

**The opportunity is not in doing more.**
**It is in making what you already have work: connecting the data, finishing the implementation and measuring what matters.**
**The organisations that do that will not just close the gap. They will define what comes next.**

**Mike Saunders**
Chief Executive, Digitlab

# Top Insights




To find the most meaningful way to segment the market, we ran the same 133 survey questions against four different ways of dividing respondents and applied the same statistical correction to each. The results are lopsided. Company size, the cut most marketing reports default to, separates only 8 of the 133 questions. Business model separates 15, but once you account for the fact that e-commerce and in-store businesses simply run more channels, that drops to one: e-commerce businesses own e-commerce platforms. Digital budget commitment separates 60 questions, and data maturity separates 70, making it the strongest single divide in the survey.

The practical implication is that knowing an organisation's size or who it sells to tells you very little about how it operates. Knowing how much of its budget goes to digital, and how far along it is with data, tells you most of what matters: how much of its technology is working, how many AI functions it has in production, what it can measure, and whether its budget is growing. Organisations benchmarking themselves should compare against peers at the same level of data maturity, not peers of the same size.

Both "digital budget commitment" and "data maturity" are self-reported and overlap with several of the measures they're being tested against.

# 01 The Market in 2026

Budgets grew. The ability to use them did not keep pace.

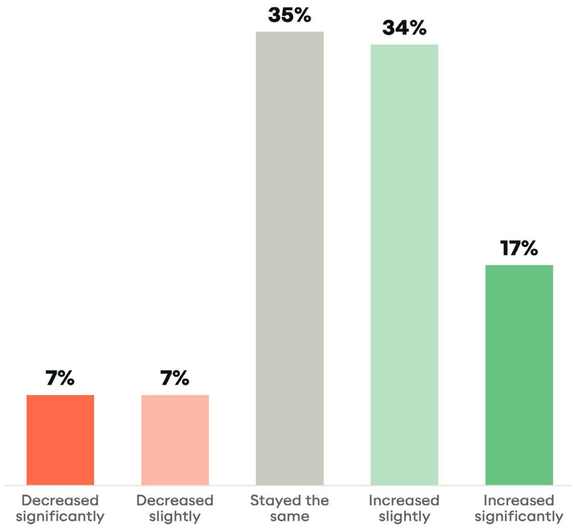
# Money moved, and it moved toward digital.

Half the market grew its marketing budget in the past year, 50.6% in total, and a further 35.4% held it flat—13.9% cut. Eighty-six per cent of this market therefore held or grew, a more confident picture than most people expect at first glance.

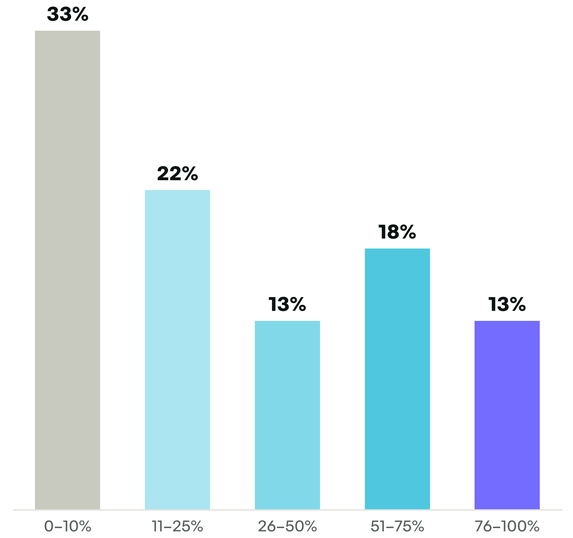
Where that money sits is the more interesting half. A third of organisations still put a tenth or less of their marketing budget into digital. At the other end, one in eight puts more than three quarters there. This market hasn't settled on an answer.

*One of the two strongest divides in this survey is not size, sector or business model. It is how much of the marketing budget goes to digital. We come back to it in part three, because it explains more than anything else we measured.*

**Marketing Budget – Past 12 months**




**Share of the marketing budget going to digital**




*Base: all 336 respondents.*

# Two more things this market is good at

Most of what follows in this report is about distance: between what has been bought and what is running, between what gets measured and what pays, between the organisations pulling ahead and the ones standing still.

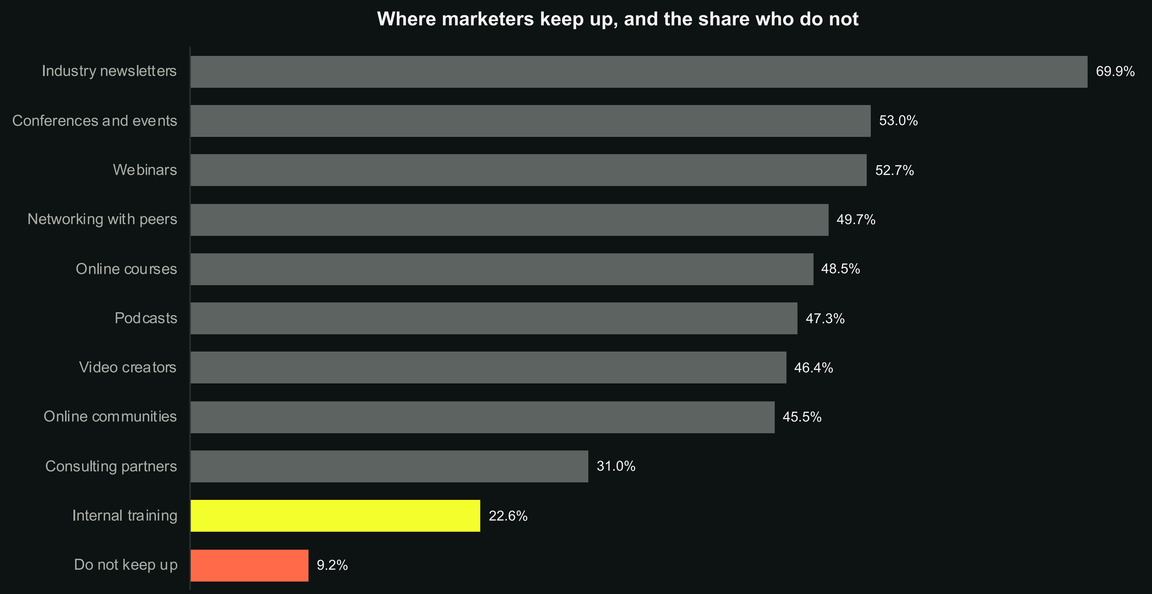
The budget picture above is the first of three findings that run the other way. Two more are worth establishing before the rest, because together they describe the conditions the harder work would be done in.

**This profession educates itself.**

Only 9.2% of respondents say they do not actively keep up with industry developments. Everyone else does, through an average of 4.76 channels. Industry newsletters reach 69.9%, conferences 53.0% and webinars 52.7%.

Internal training programmes reach 22.6%. Read those two figures together, and the picture is clear: professional development in South African marketing is overwhelmingly self-directed and externally sourced—roughly one in five marketers works somewhere that trains them.

This is also the most uniform block in the survey. Not one learning channel differs significantly by company size, and none differs significantly by job role once the number of comparisons is corrected for. This market learns the same way regardless of who you are or how large you are, which matters for anyone deciding where to publish.

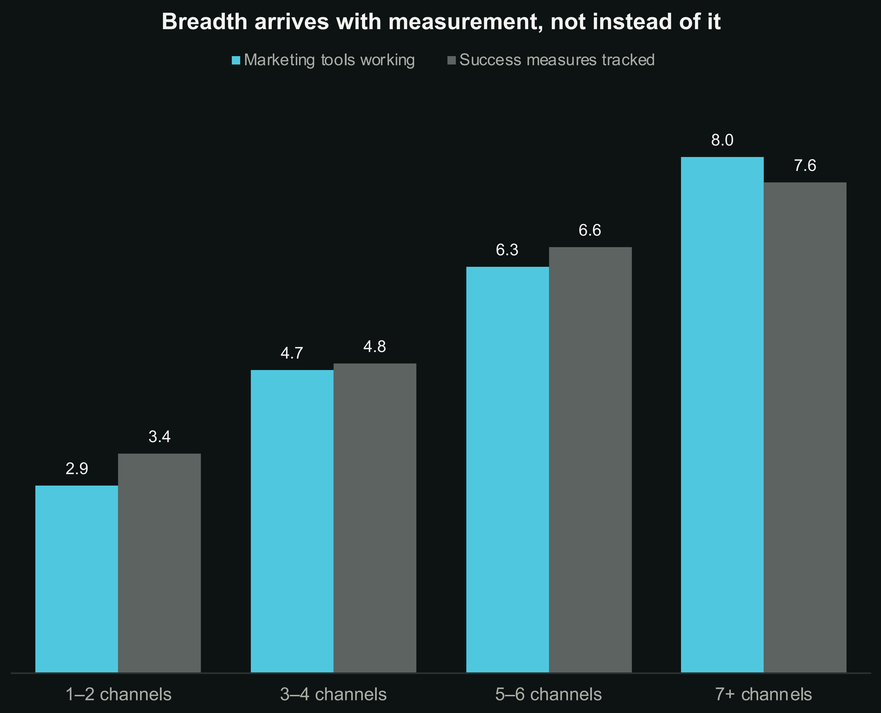



*Base: all 336 respondents. Respondents could select more than one channel and averaged 4.76.*

**Breadth here comes with discipline attached.**

Capability climbs steadily with the number of marketing channels an organisation runs:
33 among those running one or two, 42 at three or four, 49 at five or six, and 58 among those running seven or more. The two measures below move with it. Marketing tools running well rise from 2.9 to 8.0 across the same bands, and success measures tracked from 3.4 to 7.6. The organisations running the most channels also measure the most.

This data contains no spray-and-pray segment, which is the caricature the industry most often applies to itself. The survey cannot say whether breadth produces capability or capability permits breadth, and both are plausible. What it can say is that the two travel together, consistently.




*Marketing tools running well, and success measures tracked, by number of channels run—base: all 336 respondents.*

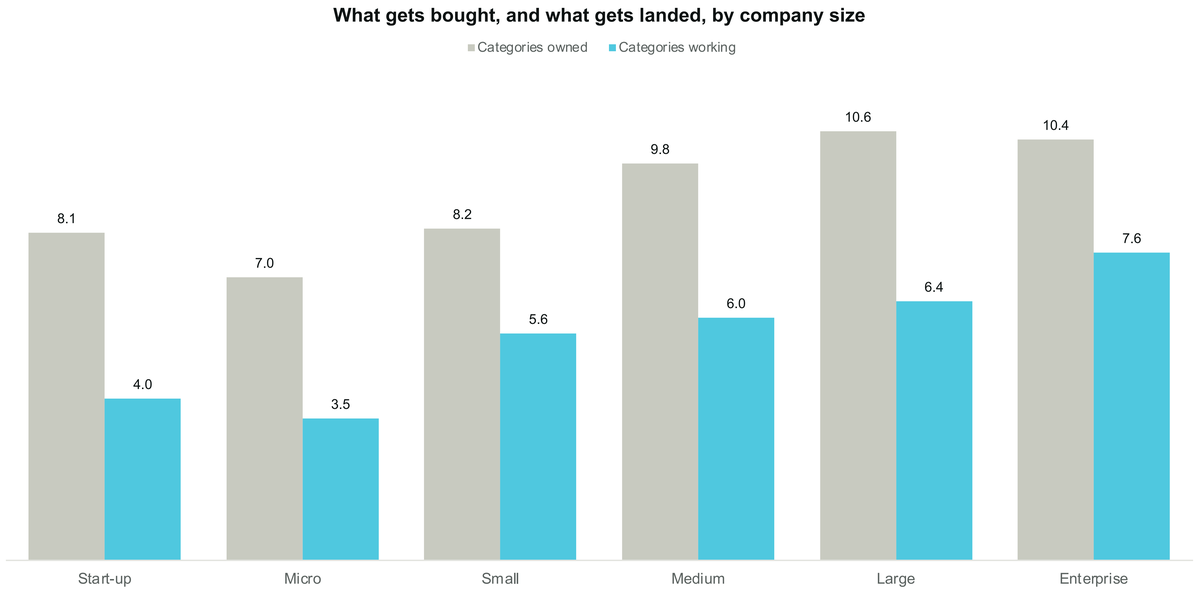
None of this softens what follows.
Two-fifths of the technology in this market is still switched off, only a quarter of organisations can see revenue from digital. But those gaps matter only in a market with money, appetite, and an accurate view of itself, because those are the conditions in which a gap is a solvable problem rather than a structural one.

# Two fifths of the technology in this market is not switched on

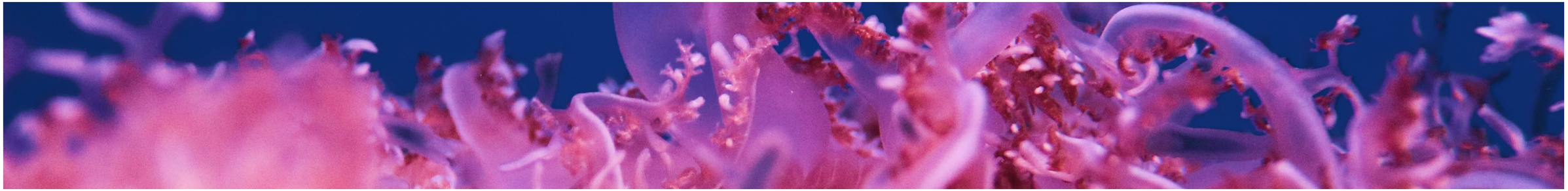
Across the sample, organisations own 2,848 pieces of marketing technology. 1,143 of those are described by the people who bought them as either not in use or not delivering value. That is 40% of the stack doing nothing.

One figure keeps this from being a fixed condition. Micro businesses have roughly half of their marketing stack working. The largest organisations have nearly three quarters. Ownership rises with size, from 7.0 categories among micro businesses to 10.6 among large ones, and the working count rises more slowly. The share of the stack that is running climbs from around half at the smallest end to nearly three quarters at enterprise level, though not in a straight line: small businesses land a higher proportion than medium-sized and large ones do.

The 40% is a market average, not a law, and the organisations landing most of what they buy aren't doing anything mysterious. Larger organisations are not simply buying more. They are finishing more of what they buy.



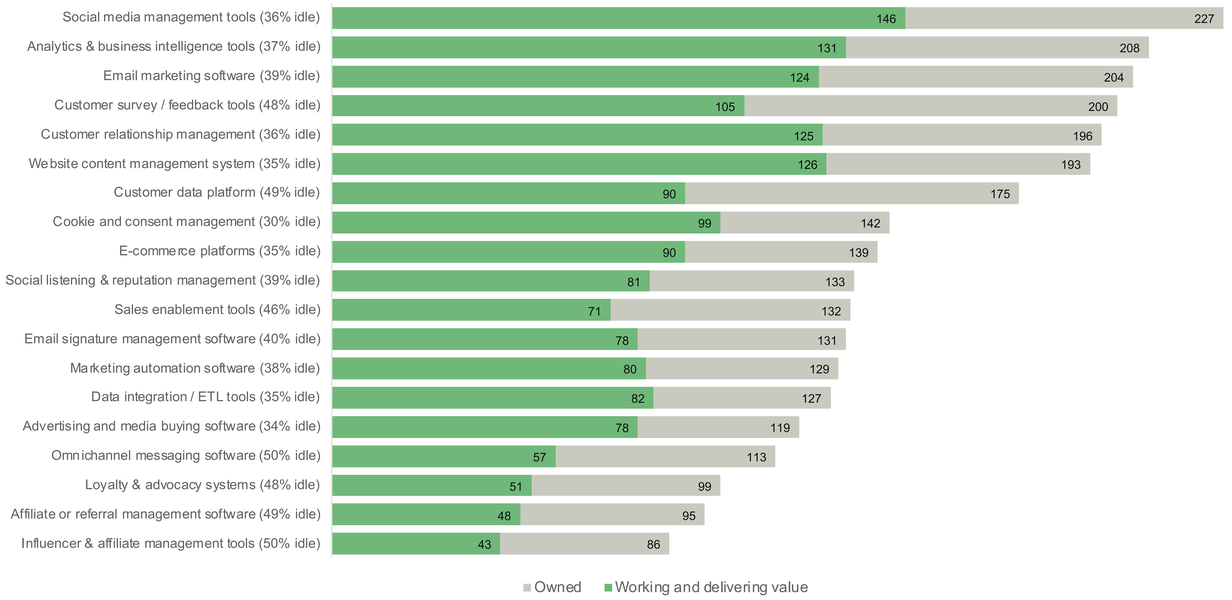

*Marketing technology categories owned against categories working, by company size. Base: all 336 respondents.*



The pattern of tool failure is not random. Social media management, email and content management are mostly working. The tools that sit idle are the ones that need clean data and a joined-up process to function: customer data platforms, omnichannel messaging, sales enablement, loyalty systems. Those are precisely the tools that everything else in a modern stack depends on. The most reliably implemented category in the whole survey is cookie and consent management, described as idle by 30.3% of the organisations that own it, against roughly half for the relationship and retention tools. This market took its consent obligations seriously, and the implementation landed. Which means the failures here are concentrated rather than general. Among the organisations that own them, the core publishing, advertising and analytics tools land at around two thirds: content management at 65%, social media management at 64%, CRM at 64%, analytics and business intelligence at 63%. The relationship and retention layer sits at roughly half.

This market can implement. What it has not yet implemented is the part that involves connecting organisations across silos, integrating data between systems and understanding the whole customer journey.

**Every marketing technology category: how many own it, how many have it working**




*Owned means implemented at any level. Working means running well and showing value, or being integral to the business—base: all 336 respondents.*

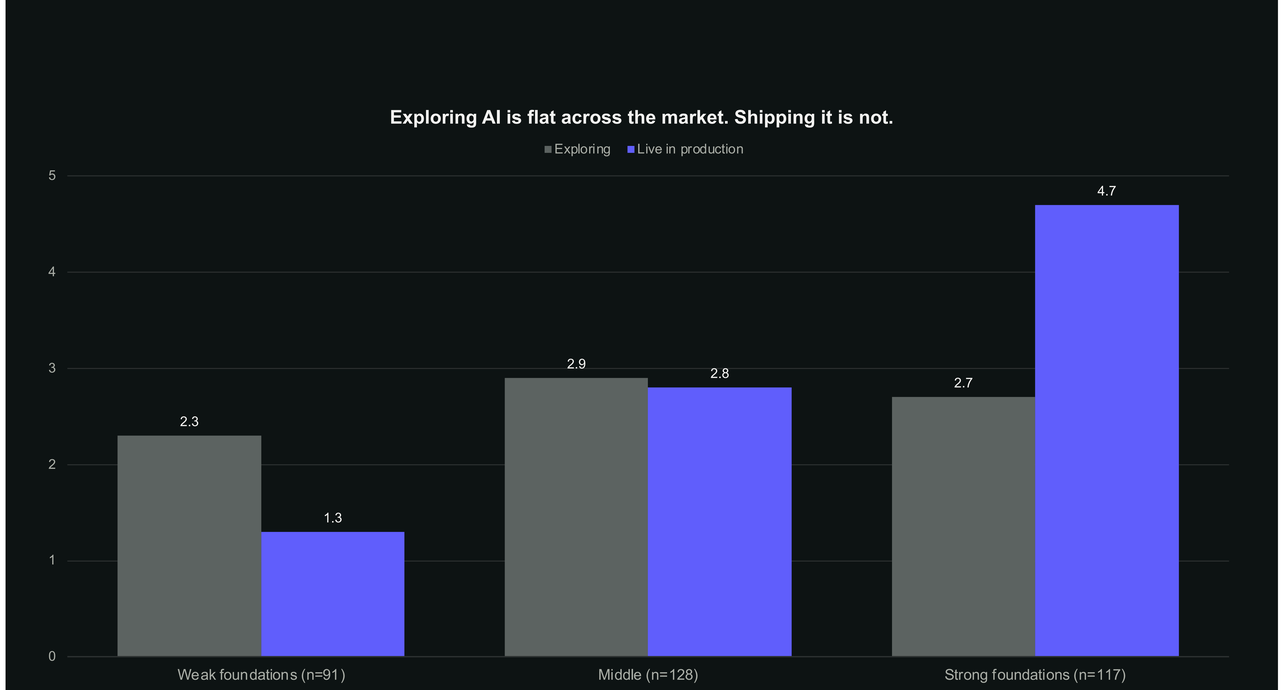
This is not a buying problem. The market has already bought. It is an implementation and operating problem, and no amount of further purchasing fixes it.

# Everyone is experimenting with AI. Only the equipped are shipping it.

This is the most useful relationship in the 2026 data, and it is easy to miss if you only look at adoption.

Count the AI functions an organisation is exploring, and that number tells you nothing about the state of its data foundations. The correlation is 0.045, which is statistically indistinguishable from zero. Exploration is evenly spread across the market. Everybody is having a go.

Count the functions running in production and the picture separates sharply. Organisations with the weakest data foundations run 1.3 AI functions live—those with the strongest run 4.7. The correlation with foundations is 0.522.



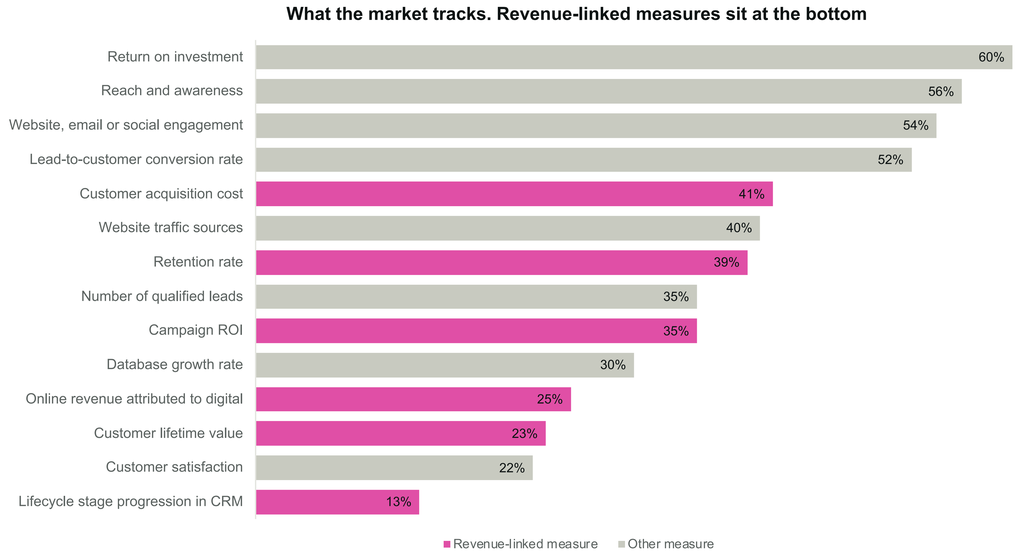

*Foundations are measured by data strategy stage, CRM and customer data platform—base: all 336 respondents.*

Read the grey bars carefully. The organisations with the weakest foundations are exploring almost as many AI functions as the strongest. They are simply not converting any of it. AI is not a capability you can buy in. It is a multiplier applied to capability that already exists, which means it widens the distance between the equipped and the rest rather than closing it.

# Measuring what is easy, not what pays

Six in ten organisations say they track return on investment. One in four can attribute revenue to digital at all. One in eight tracks how customers move through a lifecycle in a CRM.

Those figures cannot all mean what they appear to mean. If only a quarter of the market can see revenue arriving from digital, much of the reported ROI in this market is estimated rather than calculated.

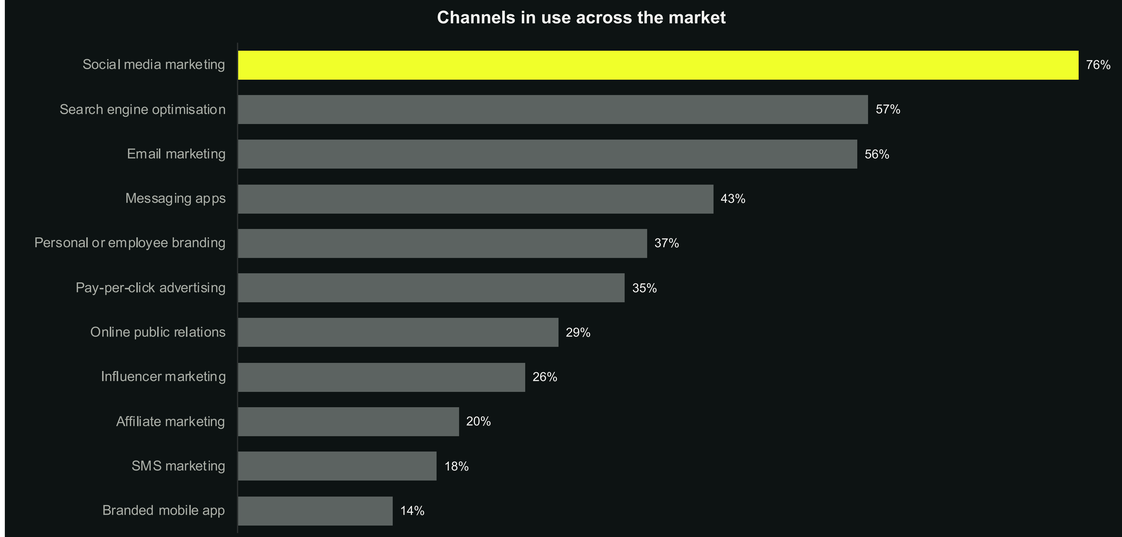



*Pink marks the six revenue-linked measures. Base: all 336 respondents; respondents could select more than one.*

The measures at the top of the list arrive free. Reach, engagement and awareness are handed to you by the platforms. The measures at the bottom require somebody to connect one system to another and keep it connected. That is the whole distinction, and it is the same distinction that separates working technology from shelfware.

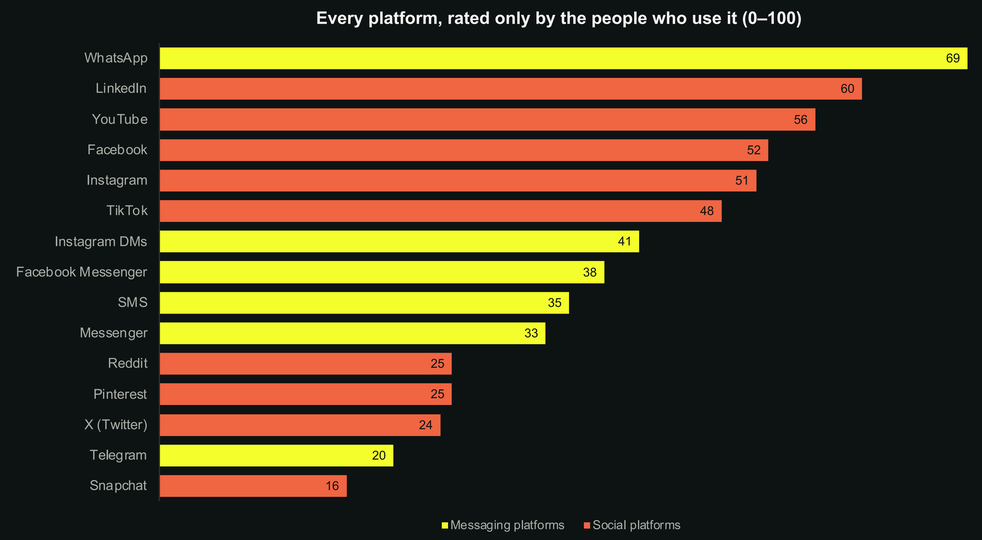
# What the market runs, and what actually works on it

Social media marketing reaches three-quarters of the market, search and email a little over half. Below that, the drop is steep. Branded mobile apps and SMS sit in the teens, with affiliate marketing at 20%.




*Base: all 336 respondents; respondents could select more than one channel.*

Effectiveness tells a different story from reach. Score every platform only among the people who use it, and the most effective platform in this market is WhatsApp, ahead of LinkedIn and well ahead of the feed platforms that absorb most of the strategy conversation.

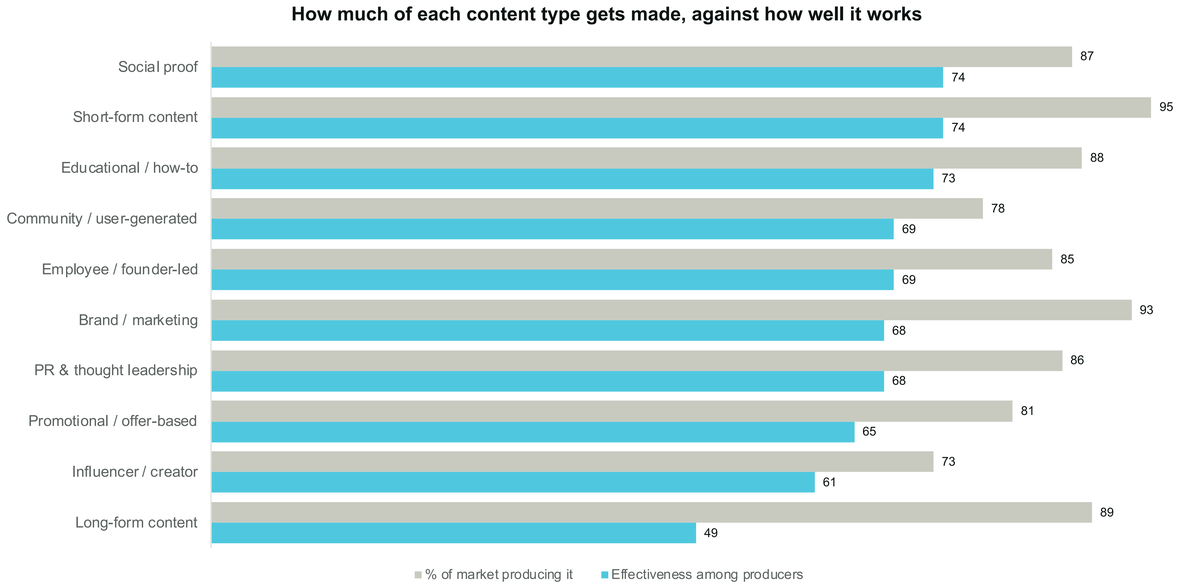



*Scored only by respondents who rate each platform. Social and messaging were asked as separate question blocks. Base varies by platform; the lowest-scoring platforms are also the least used, so those scores rest on narrow bases.*

*37% of the entire sample calls WhatsApp integral to their marketing. That is the highest integral rating anywhere in this survey, and it holds in every business model.*

# The content we make most of works least well

Long-form content is produced by 89% of the market and rated last of ten types. The gap between how much of it is made and how well it works is 40 points. The next widest gap is 25.

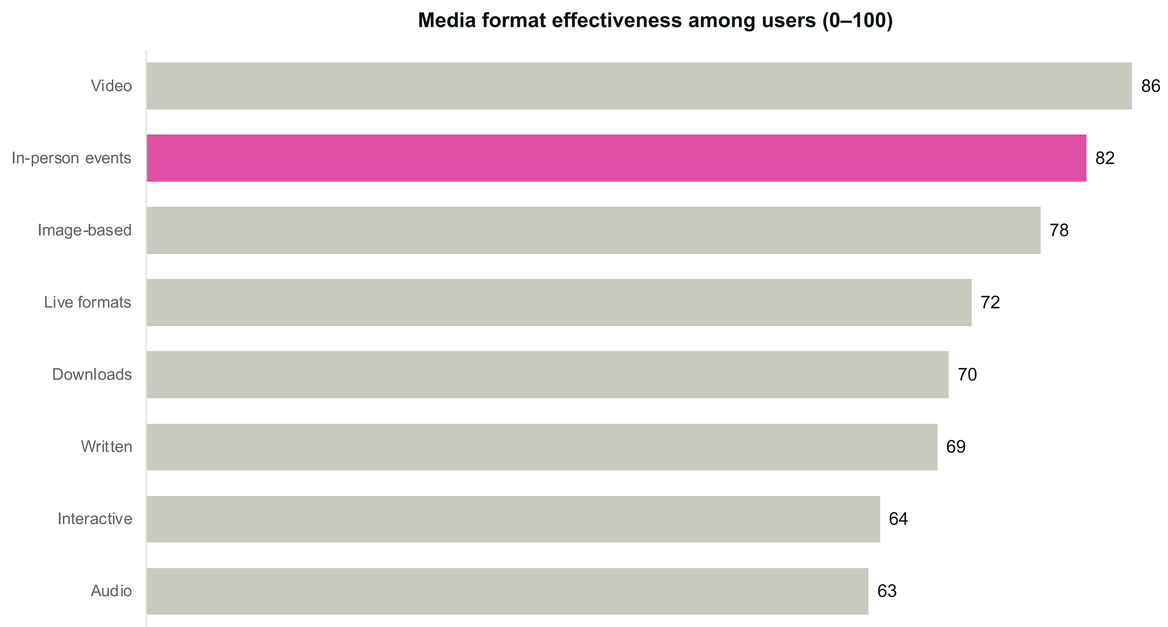



*Production is the share of respondents who rate the type, meaning they produce it. Producers only score effectiveness from 0 to 100.*

A fair objection is that long-form does a job this question doesn't capture: search visibility and citation, increasingly by AI systems rather than people. That objection is now the entire case for long-form, and it is a different case from the one most content plans are built on.

# The quiet finding: the room still works

In a digital marketing survey, the second most effective media format is being in a room with people. In-person events score 82, compared with video at 86, ahead of written content, downloads, and interactive tools. Only 14% marked it not applicable, so this is not a small enthusiastic base.




*Scored only by respondents who use each format. Base: all 336 respondents.*

# B2B, eCommerce and in-store

The three business models genuinely differ, but not in the way the raw numbers first suggest. Start with what distorts everything else.

# First, the trap

Organisations serving online customers run 4.9 marketing channels on average. Those with in-store customers run 4.9. Those serving other businesses run 4.1.

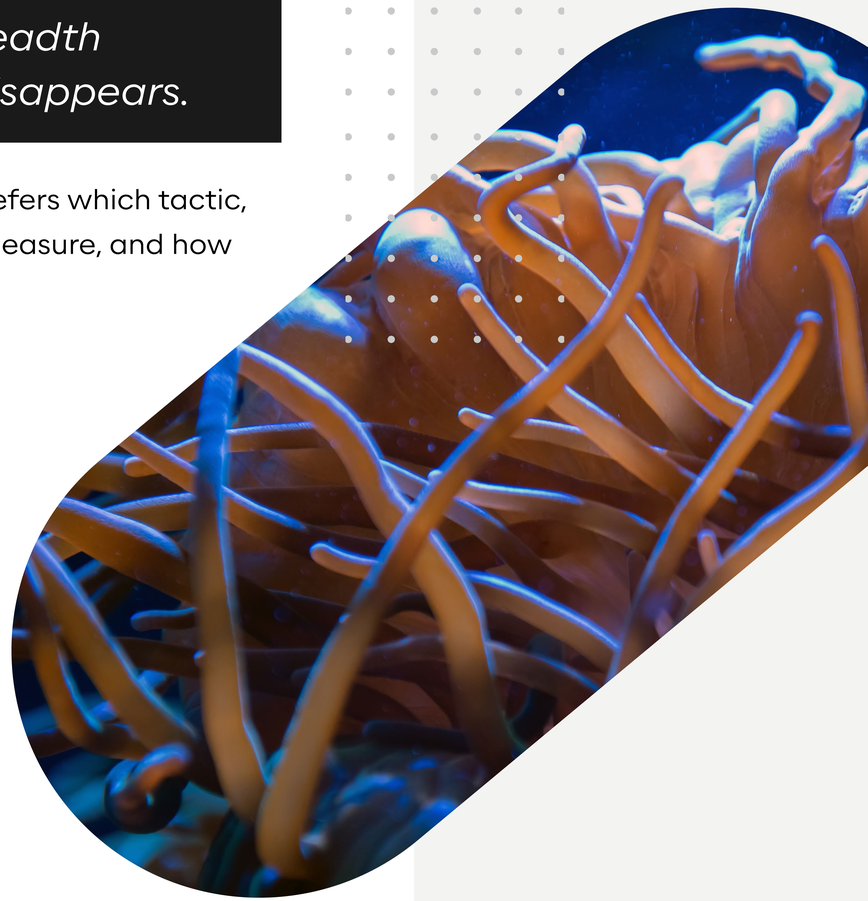
*Base: B2B 271, e-commerce 163, in-store 93. Groups overlap: respondents could select more than one customer type.*

That difference sounds small. It is not. It means that on any chart showing what each group does, e-commerce and in-store will appear to lead on almost every row, simply because they do more things. Read that as a preference and you will reach the wrong conclusion repeatedly.

We tested this properly. Comparing the three models across 133 questions produces 15 differences that survive correction for the number of tests run. Hold channel breadth constant, and exactly one survives: e-commerce businesses own e-commerce platforms.

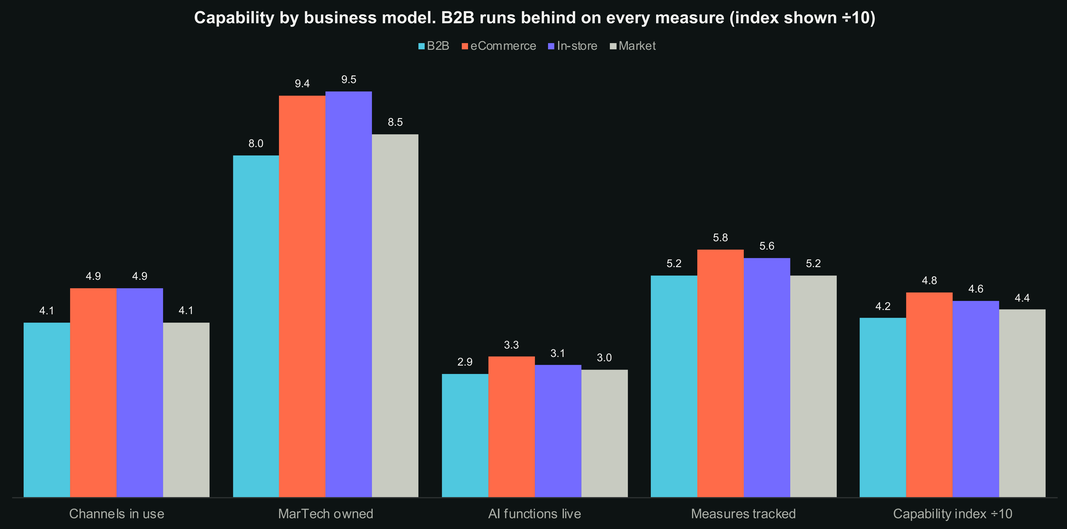
> *It is worth saying plainly, because this is the most common way a survey like this misleads readers: in-store businesses favour employee and personal branding, at least they appear to, at 45% against a market average of 37%. But hold the breadth constant, and that difference disappears.*

So the useful question is not which model prefers which tactic, but what each model can see, what it can measure, and how wide it runs.



# B2B is the narrow one

The most consistent finding across the three models is that organisations selling to other businesses run a smaller operation on every measure we have.




*The capability index is a composite of data foundations, measurement discipline, and investment intent, shown divided by ten for scale—base as above.*

| Measure | B2B | eCommerce | In-store | Market |
|---|---|---|---|---|
| Marketing channels in use | 4.1 | 4.9 | 4.9 | 4.1 |
| MarTech categories owned | 8.0 | 9.4 | 9.5 | 8.5 |
| AI functions in production | 2.9 | 3.3 | 3.1 | 3.0 |
| Success measures tracked | 5.2 | 5.8 | 5.6 | 5.2 |
| Data foundations, 0 to 100 | 47 | 53 | 53 | 50 |
| **Capability index, 0 to 100** | **42** | **48** | **46** | **44** |

Some of this follows from breadth. Some of it does not. The six-point capability index gap between B2B and e-commerce holds up, and it comes from data foundations and measurement rather than channel count.

**The reading that fits the evidence:**
B2B marketing in this market runs with fewer channels, less technology, and less measurement than consumer-facing marketing, and the organisations doing it are not obviously aware they are behind.

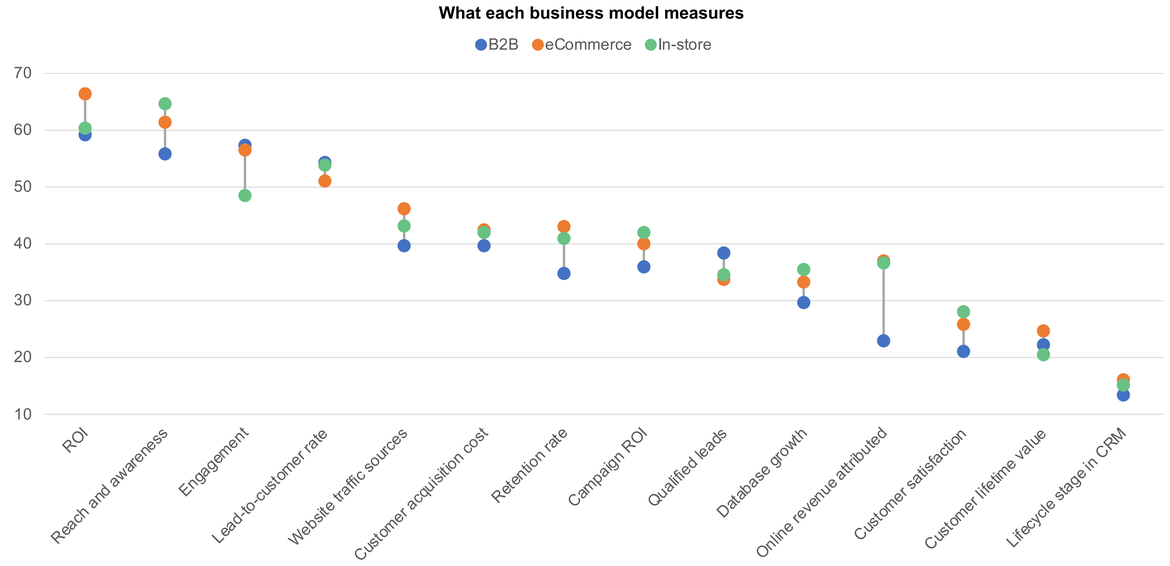
# What each model can actually see

The sharpest genuine difference between the three models is revenue visibility, and it is the only difference with a clear mechanism behind it rather than a preference.

Among organisations selling online, 37% can attribute revenue to digital. Among those selling to other businesses, 23% can. This difference is structural rather than cultural: when the transaction happens on your own site, attribution is a reporting question. When it happens after a three-month sales cycle and two meetings, it is a systems problem that somebody has to solve deliberately.

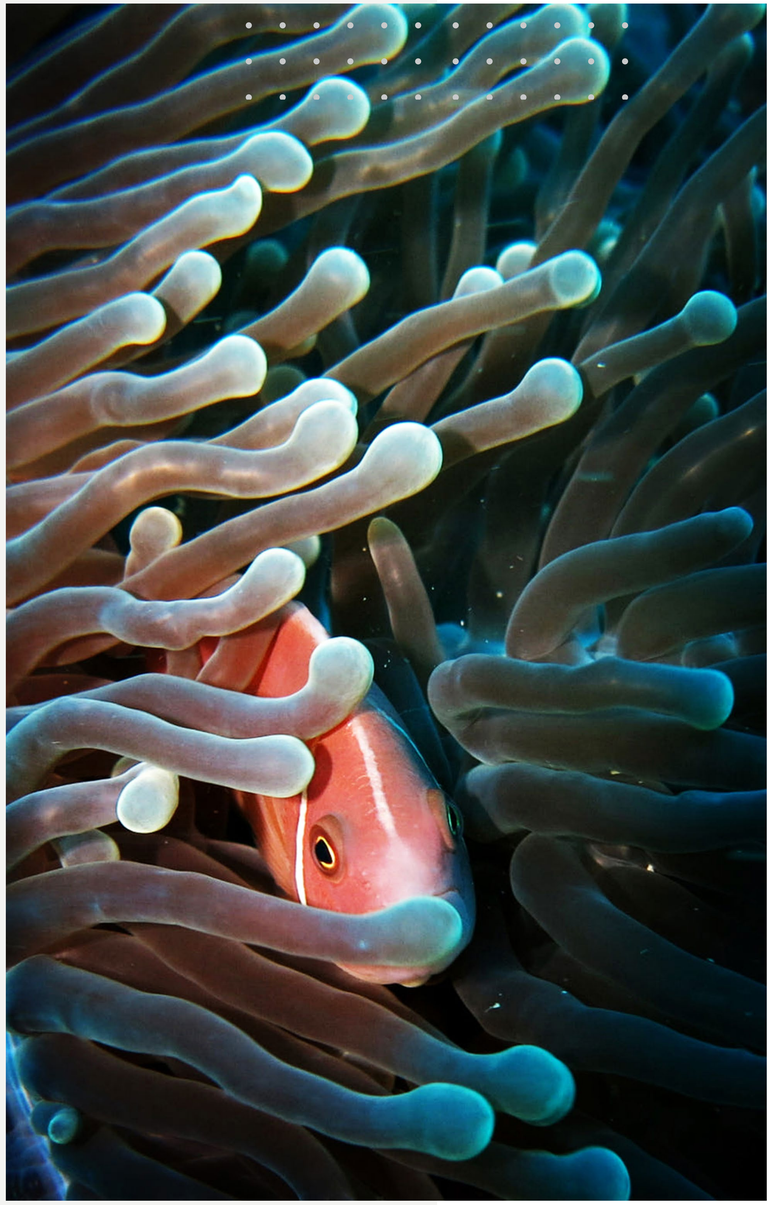
The consequence runs through everything else. The B2B organisations in this sample are making investment decisions with materially less visibility into what their marketing returns, which reasonably explains why they are running narrower and buying less technology. It is hard to justify a channel you cannot measure.

The chart shows what share of each group tracks each success measure. Read it top to bottom, and the three models mostly agree: everyone tracks return on investment, reach and engagement, and almost nobody tracks lifecycle progression. The interesting rows are the ones where the dots pull apart.

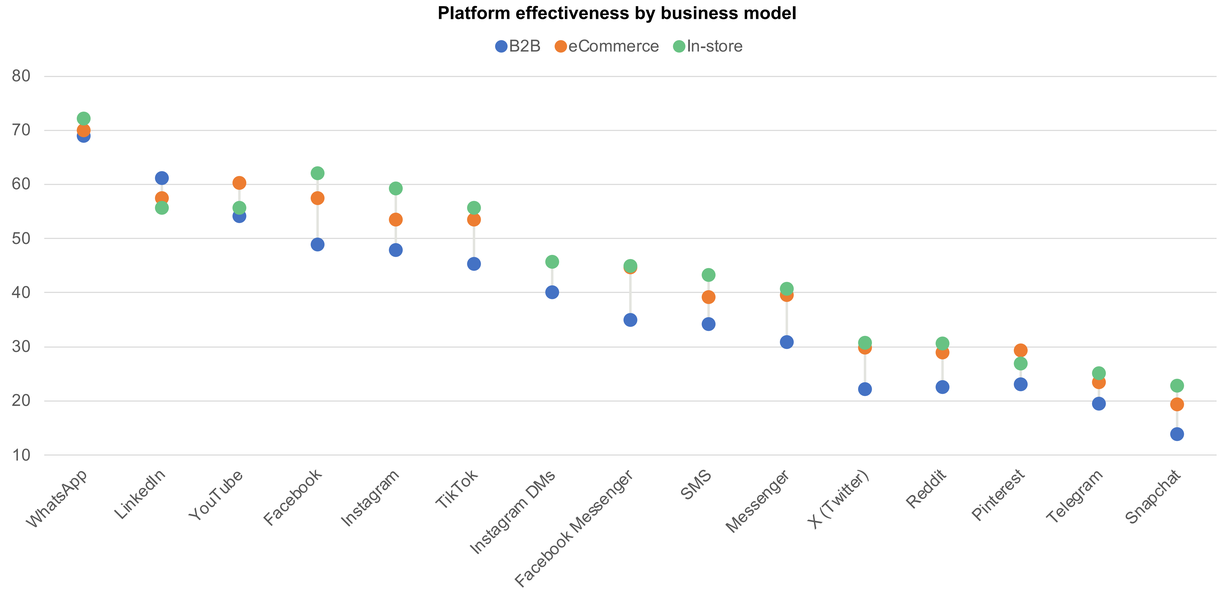



*Base: B2B 271, e-commerce 163, in-store 93. Groups overlap.*

The remaining differences are small but consistent. B2B tracks qualified leads more often and retention less. E-commerce and in-store both track customer acquisition cost and retention more often than B2B does. Lifecycle progression sits at the bottom for all three, which is the clearest shared blind spot in the survey.



# Platforms: one real split, and a lot of noise



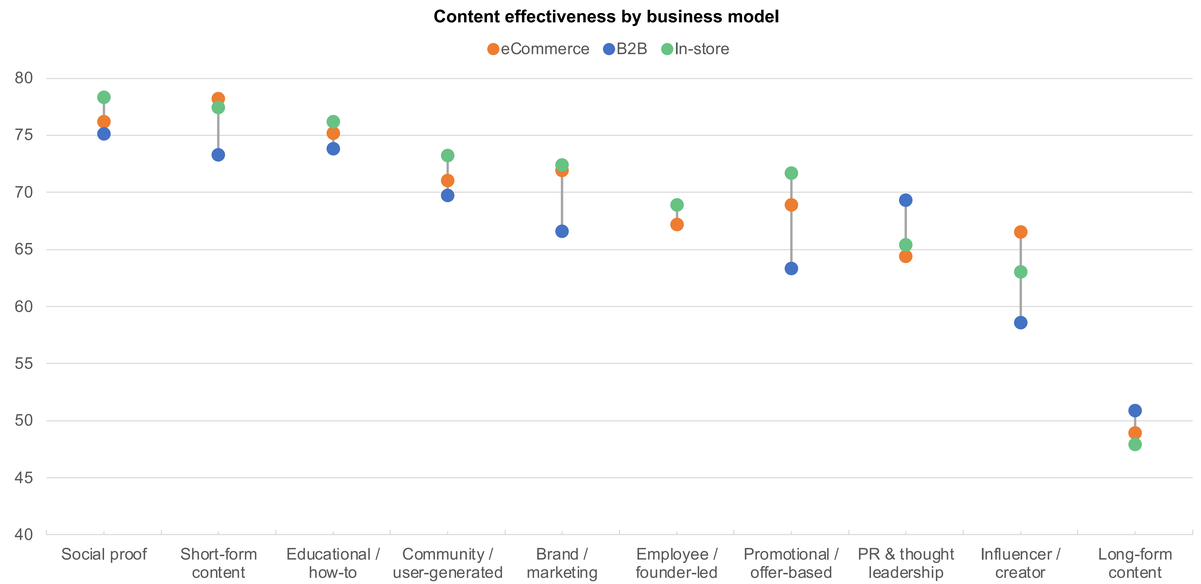

*Scored only by respondents in each group who rate that platform. Base as above.*

**LinkedIn** is the only platform in the survey that organisations selling to other businesses rate more highly than anyone else, which is both unsurprising and the point: it is the single platform where the B2B case is clear in the data rather than assumed.

**Instagram** is the mirror image. B2B rates it 48 against 59 among in-store organisations, and that difference holds up after a breadth control. Facebook shows the same shape, rated highest by organisations with physical premises.

**WhatsApp** sits at the top for all three models. There is no business-model story there at all, which is itself the story: this is the one platform that works regardless of who you sell to.

# Content: the same hierarchy, with one exception

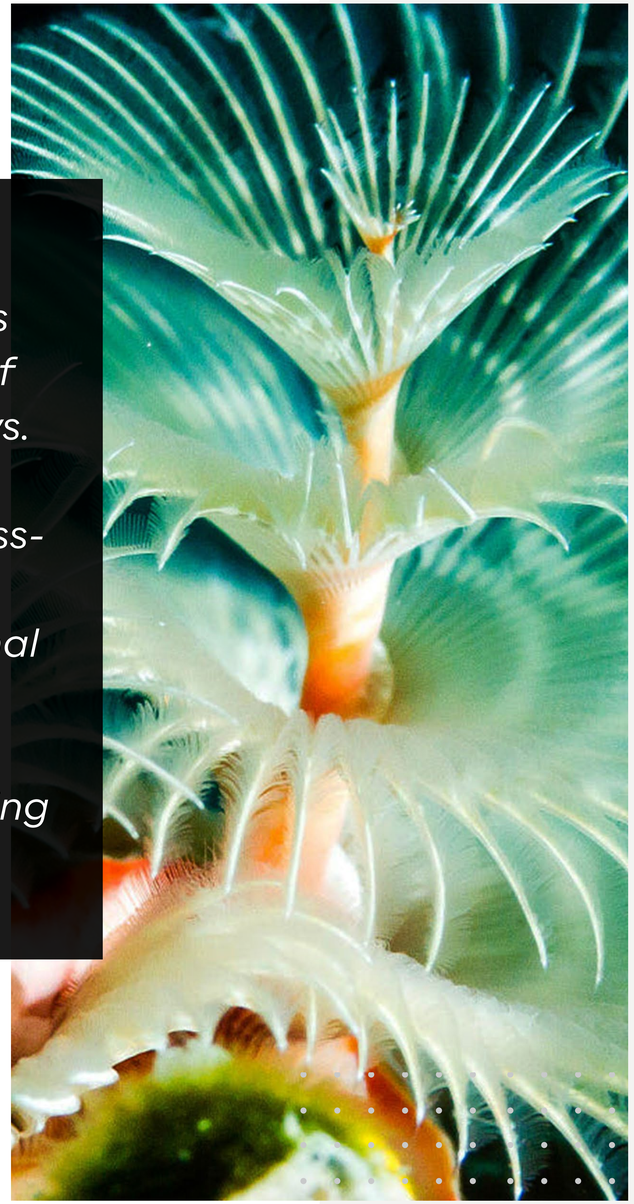



*Scored only by respondents in each group producing that content type. Base as above.*

The order barely moves between models. Social proof, short-form and educational content lead for all three; long-form trails for all three. What differs is the size of the gap at each end.

B2B rates promotional and offer-based content lowest of the three models and thought leadership highest, the one place in the content data where the models behave as conventional wisdom expects. Influencer content shows the largest spread, rated well by e-commerce and poorly by B2B.

*These gaps are real but modest, and the models sit within a few points of each other on most rows. If you are choosing a content mix, the business-model differences here are a much weaker signal than the market-wide finding that long-form underperforms everything else.*

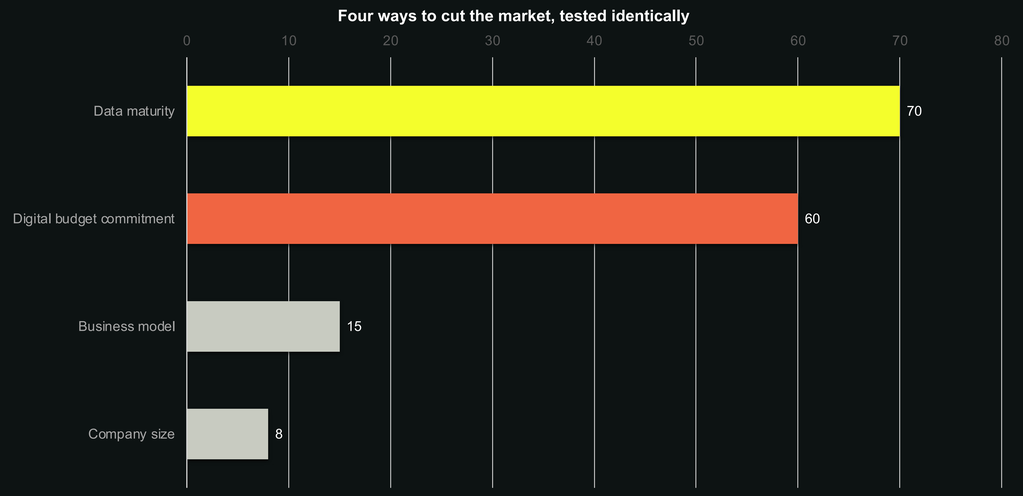


# The divides that actually matter

If you take one thing from this report, take this. The useful way to segment this market is not by size or business model. It is by how committed an organisation is to digital, and by how mature it is with data.

# Four ways to cut the market, tested identically.

We ran the same 133 questions against four different ways of dividing the market, applied the same correction for the number of tests, and counted how many questions each division genuinely separates.



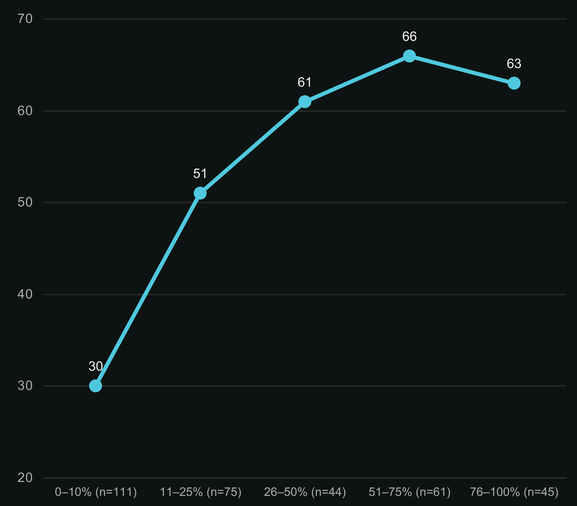

| How you cut the market | Questions it separates | Verdict |
|---|---|---|
| Company size | 8 | Comfortable, and nearly useless |
| Business model | 15 (1 after breadth control) | Describes mix, not capability |
| Digital budget commitment | 60 | Strong, and actionable |
| **Data maturity** | **70** | **Strongest single divide in the survey** |

*A question counts only if the difference survives the Benjamini-Hochberg correction at 5% across all 133 tests within that lens—base: all 336 respondents.*

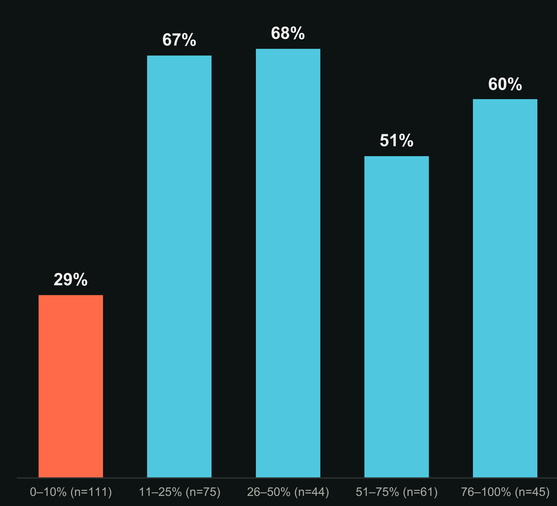
The industry habit of cutting everything by employee count is the weakest of the four by a wide margin. It is worth being blunt about that, because it is the cut that appears in almost every marketing report published in this market, including our own in previous years.

# The first divide: how much you commit to digital

Group organisations by the share of the marketing budget going to digital, and the pattern is not a gradient. It is a cliff, and it sits at the bottom.




*Data foundations index.*




*Share that grew their marketing budget last year. Base sizes shown on the chart.*

| Digital share of budget | n | Channels | MarTech working | AI live | Foundations | Grew budget |
|---|---|---|---|---|---|---|
| 0-10% | 111 | 3.6 | 2.2 | 1.5 | 30 | 29% |
| 11-25% | 75 | 4.2 | 5.1 | 3.1 | 51 | 67% |
| 26-50% | 44 | 4.5 | 6.9 | 3.5 | 61 | 68% |
| 51-75% | 61 | 4.8 | 7.5 | 4.5 | 66 | 51% |
| 76-100% | 45 | 3.8 | 7.0 | 4.0 | 63 | 60% |

Everything changes between the first band and the second. Organisations putting under a tenth of the budget into digital have 2.2 working MarTech tools and 1.5 AI functions in production. Move up one band, and those become 5.1 and 3.1. Data foundations jump from 30 to 51. There is no comparable jump anywhere else in the series.

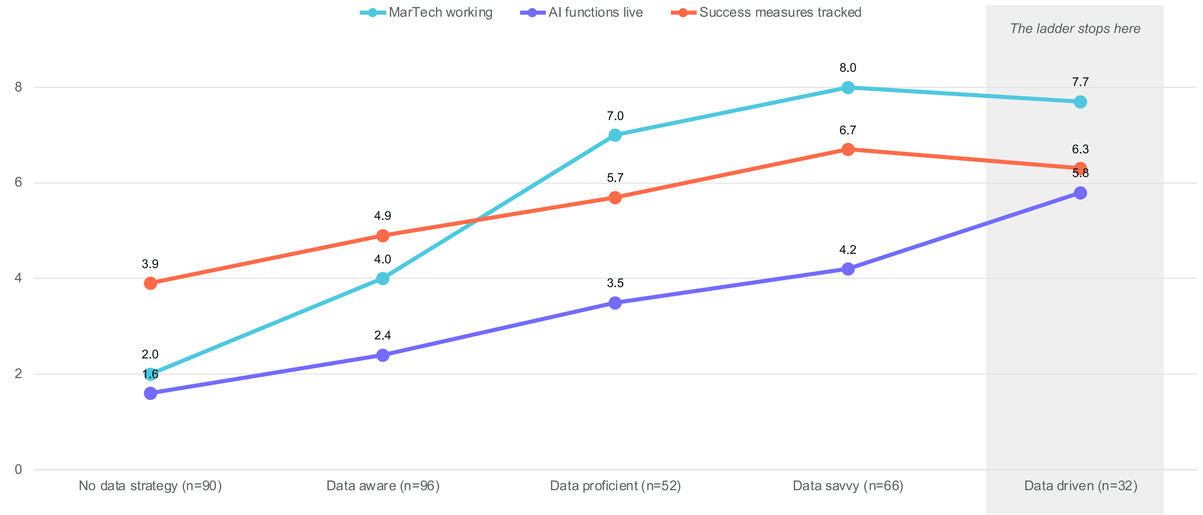
**And the budget data closes the loop.** Organisations in that bottom band were the least likely of anyone to have grown their marketing budget last year: 29% did, against roughly two-thirds in the middle bands. The under-committed are also the stalled, which means the gap is widening rather than closing.

Above the halfway point, the returns flatten. Organisations putting more than half their budget into digital are not meaningfully better equipped than those at 26 to 50%, and the and the top band shows one of the highest rates of budget cuts (18%) alongside a high growth rate (60%), suggesting a volatile group rather than an advanced one. alongside a high growth rate, suggesting a volatile group rather than an advanced one.

*Digital budget share is largely independent of company size in this sample, so it is not a proxy for company size. It is carrying real information about commitment.*

# The second divide: data maturity, and where the ladder breaks

We asked respondents to place themselves on a five-rung scale from no data strategy to data-driven. For four rungs, the scale behaves exactly as a maturity scale should.



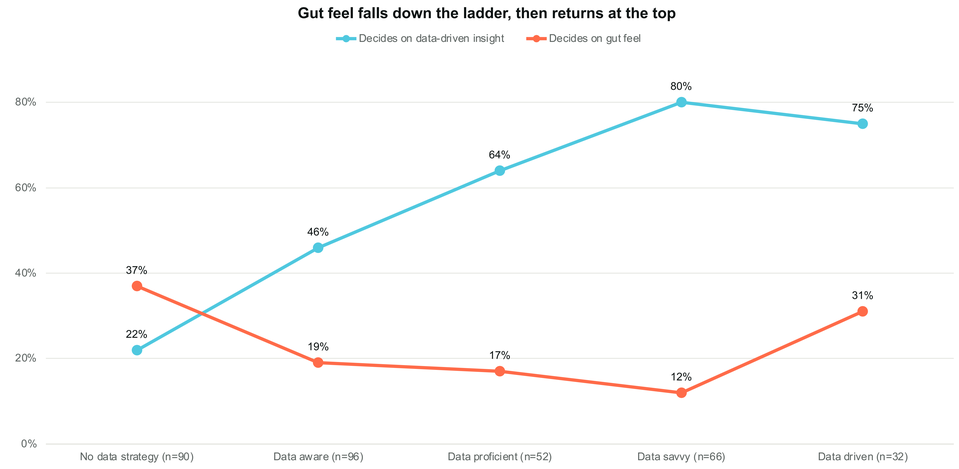

| Data maturity stage | n | MarTech working | AI live | Measures tracked | Capability | Grew budget |
|---|---|---|---|---|---|---|
| No Data Strategy | 90 | 2.0 | 1.6 | 3.9 | 27 | 31% |
| Data aware | 96 | 4.0 | 2.4 | 4.9 | 39 | 52% |
| Data Proficient | 52 | 7.0 | 3.5 | 5.7 | 53 | 60% |
| Data Savvy | 66 | 8.0 | 4.2 | 6.7 | 57 | 68% |
| Data Driven | 32 | 7.7 | 5.8 | 6.3 | 61 | 50% |

*The chart shows base sizes. Working MarTech is the count of tools running well or integral.*

Working technology climbs from 2.0 to 8.0 across the first four rungs. Revenue measures climb from 3.9 to 6.7. Budget growth climbs from 31% to 68%. This is the cleanest progression in the survey, and the strongest argument in the data for treating data maturity as a business objective rather than a technical one.

Then the top rung stops behaving. Organisations calling themselves data-driven have no more working technology than the data-savvy, track no more measures, and are less likely to have grown their budget. On technology and measurement, the top two rungs are the same organisations.

One thing does change at the top, and it is the tell.




*Share of each group citing each factor as an input to marketing investment decisions. Base sizes as in the table above.*

Reliance on gut feel falls steadily down the ladder, from 37% among those with no data strategy to 12% among the data savvy, and then jumps back to 31% at the top rung. The final rung does not measure capability. It measures confidence.

*With 32 organisations on the top rung, this is directional rather than settled, and we are testing it deliberately in 2027. But it is a live risk for anyone using a self-assessed maturity scale to make decisions, including ours.*

**The practical version:** an organisation describing itself as data-driven is telling you about its self-image. An organisation that can attribute revenue to digital is telling you about its systems. Only the second one is checkable.

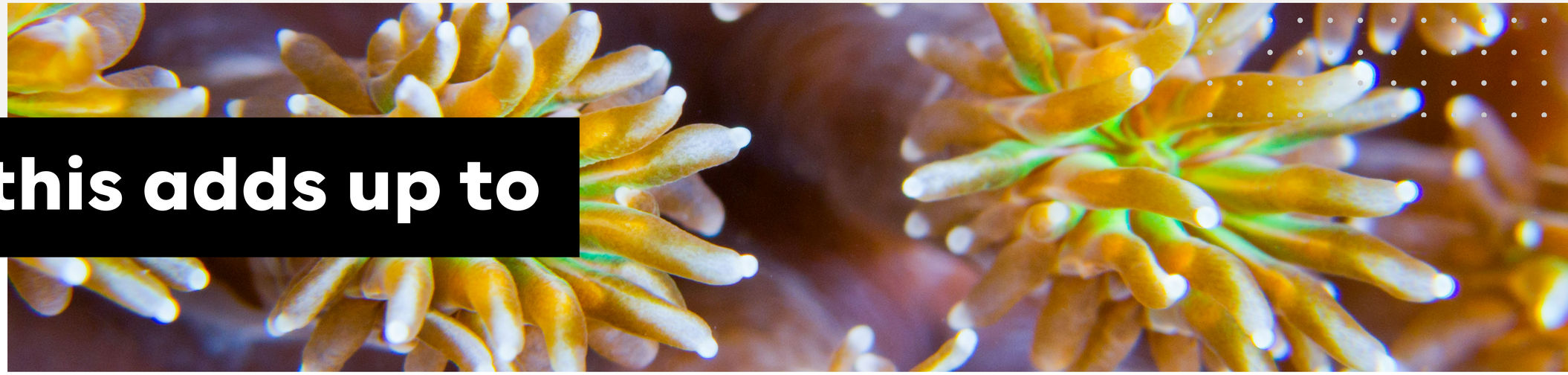
# And the divide that is not there

Company size is the cut everyone reaches for first, and in this data it does almost nothing.

On the capability index, no size band separates from the market average beyond sampling noise. The order is not even monotonic: start-ups score higher than small and large businesses. Enterprises have the strongest raw data foundations, as you would expect from organisations with the budget to buy them, but that does not translate into a materially higher capability index.

Eight of 133 questions are separated by size. Seventy separates by data maturity. If you are deciding where to look for a peer group, or how to benchmark yourself, the second is the comparison worth making.

# What this adds up to



Five things follow from the 2026 data, in the order we would act on them.

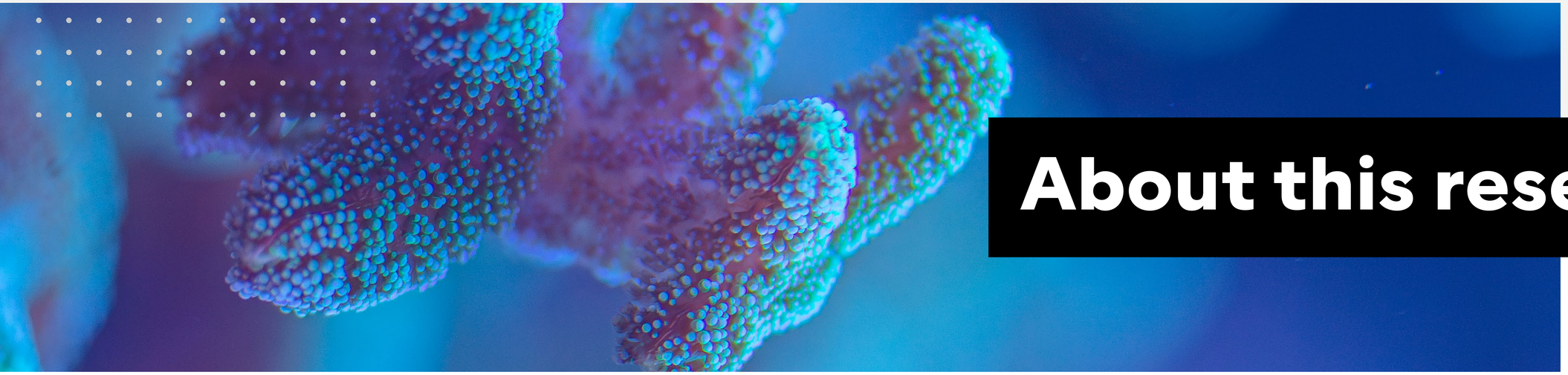
Finishing beats buying. Two fifths of the technology in this market is idle, and the tools that sit idle are the ones everything else depends on. The next gain for most organisations is in the stack they already own.

AI capability is downstream of data capability. Exploring AI tells you nothing about an organisation. Running it in production tells you almost everything, because it is only possible where the foundations already exist.

Measure the things that are hard to measure. The measures at the top of this market arrive free from the platforms. Predictive measures require someone to connect two systems and keep them connected.

If you sell to other businesses, assume you are behind. B2B in this sample runs fewer channels, owns less technology, measures less, and attributes revenue less often than consumer-facing marketing. Much of that traces back to attribution being genuinely harder, which makes it a problem to solve rather than an excuse.

Benchmark against organisations at your level of data maturity, not your size. Size explains eight of 133 questions. Maturity explains seventy.



# About this research

336 completed responses to the State of Digital 2026 survey, 94.6% of them South African, fielded through 2026. Percentages are of all 336 respondents unless stated otherwise. Effectiveness scores include only respondents who use the thing being rated.

One safeguard in this study is worth explaining, because it separates a finding from a coincidence.

Ask 336 people 133 questions, then compare the answers group by group, and you are running more than a thousand comparisons. At the threshold normally used in work like this, one comparison in twenty will look meaningful by chance alone. So a thousand comparisons throw up around fifty differences that are pure luck, and on the page those look exactly like the real ones.

The way to tell them apart is to raise the bar in proportion to the number of comparisons made. We have done that for every segment comparison in this report, and only the differences that clear the higher bar appear here. Several that would have made good headlines did not clear it, so you will not find them.

The Databook tabulates every question with its base and its cross-tabs.

# 04 Data Book

For the thorough reader.

# The Insight 2027 report tells a story. This book holds everything that story was built from.

Here you'll find every question we asked, with every answer, base and cross-tab, including the numbers that didn't make the final cut. Some were left out because they weren't interesting. Others were left out because they didn't clear the statistical bar we set, and those deserve the most caution.

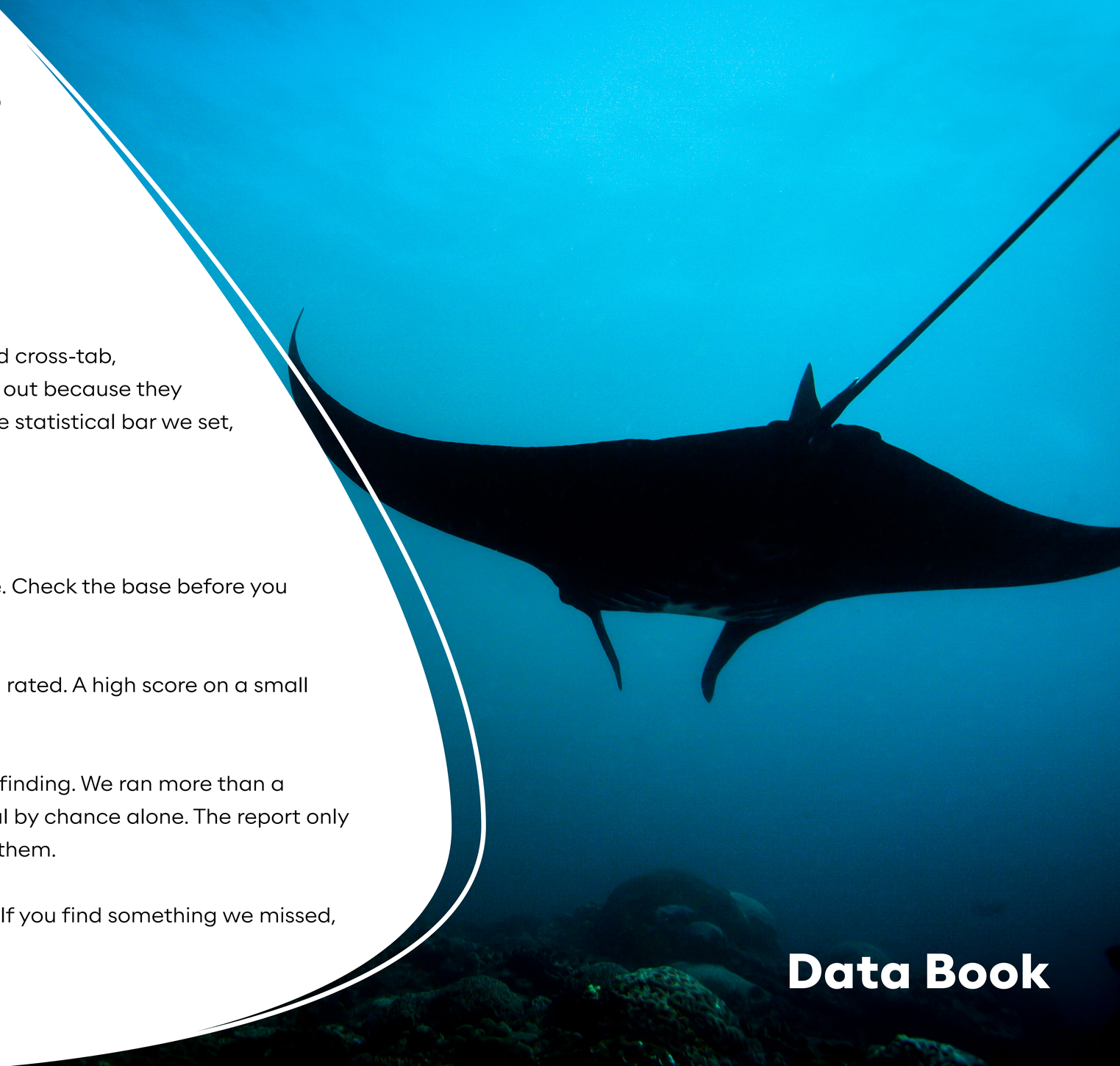
**A few things to keep in mind as you read:**

Percentages are of all 336 respondents unless a table says otherwise. Check the base before you compare two numbers.

Effectiveness scores include only the people who use the thing being rated. A high score on a small base means it is loved by the few who use it, not that it's popular.

A difference between two groups in this book is not automatically a finding. We ran more than a thousand comparisons, and around fifty of them will look meaningful by chance alone. The report only uses the ones that survived a stricter test. This book shows you all of them.

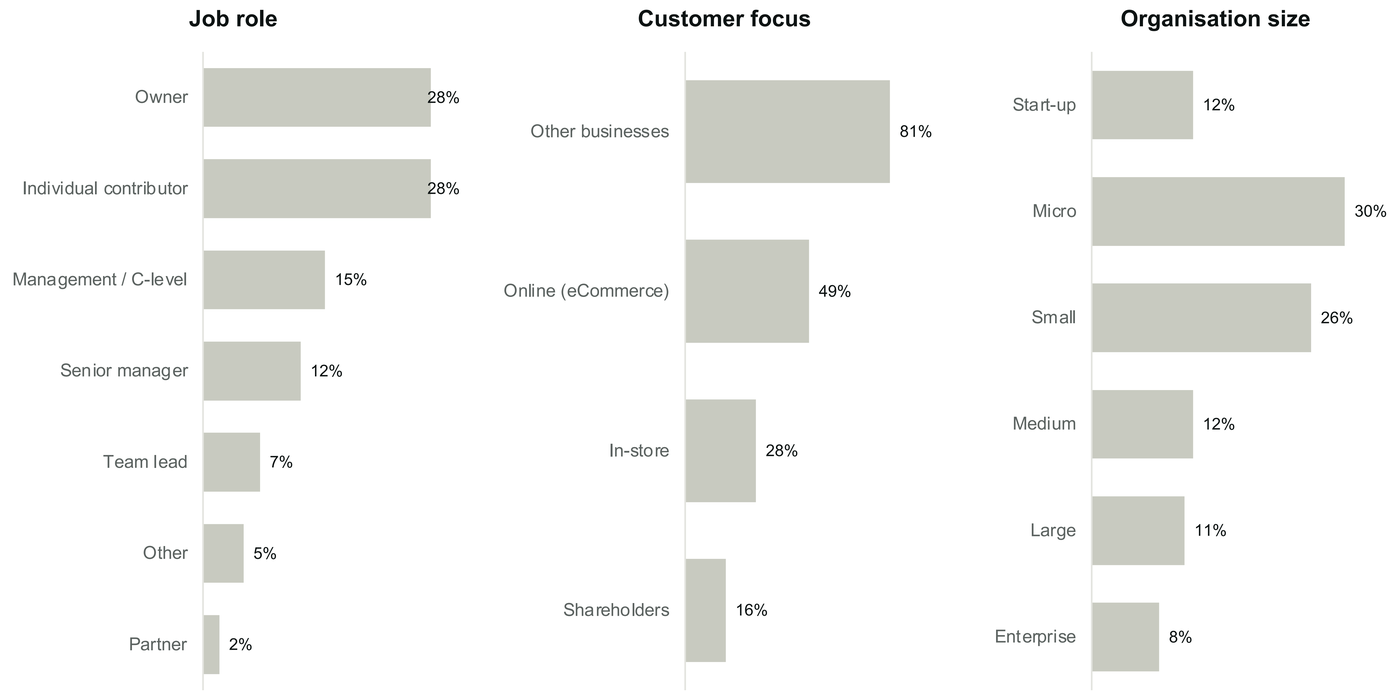
Use it to check our work, find your own angle, or settle an argument. If you find something we missed, tell us.



Data Book

# Respondent profile

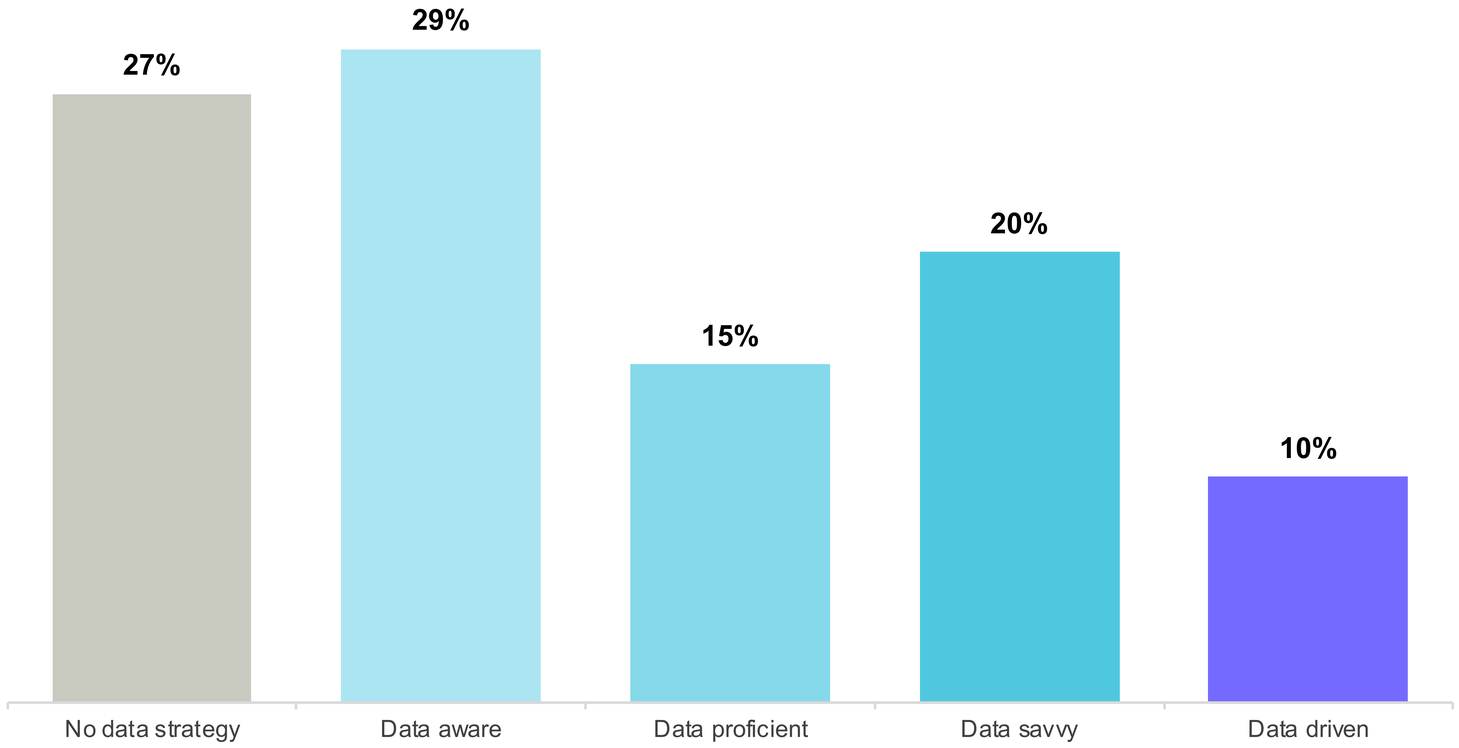
A01 · Respondent profile (n = 336)



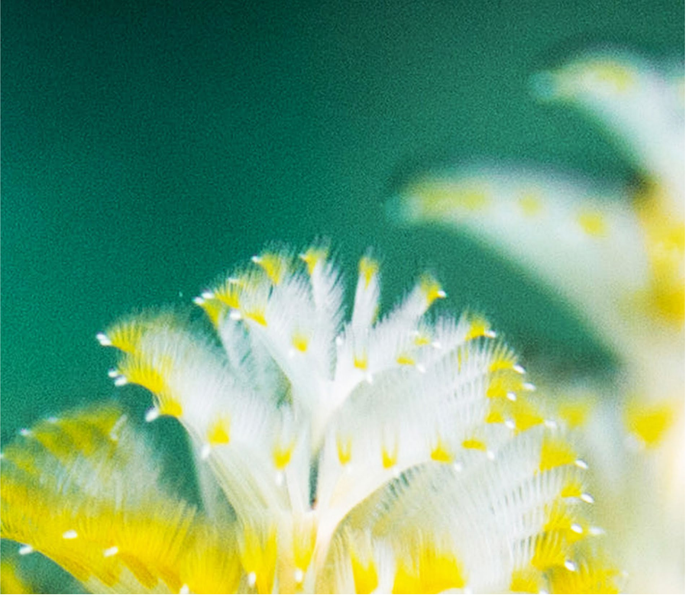

Base: all 336 respondents. Job roles held by under 1% of the sample are not shown, so that panel sums to 97.6%

# The Market in 2026

Over half the market (56%) sits on the bottom two rungs: 27% have no data strategy and 29% are only data aware. One in ten calls itself data driven.



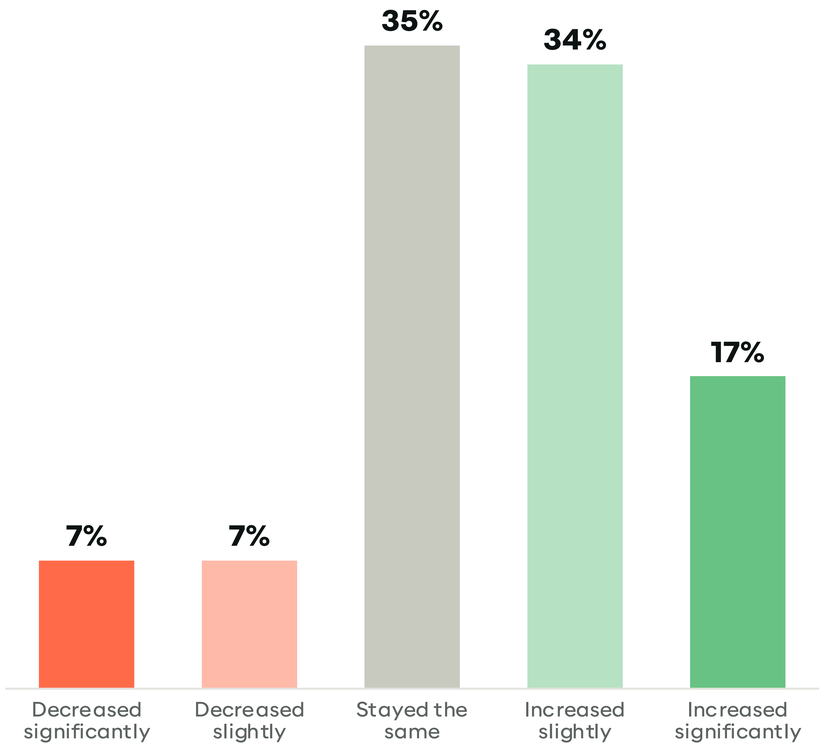
# Where the market sits on data



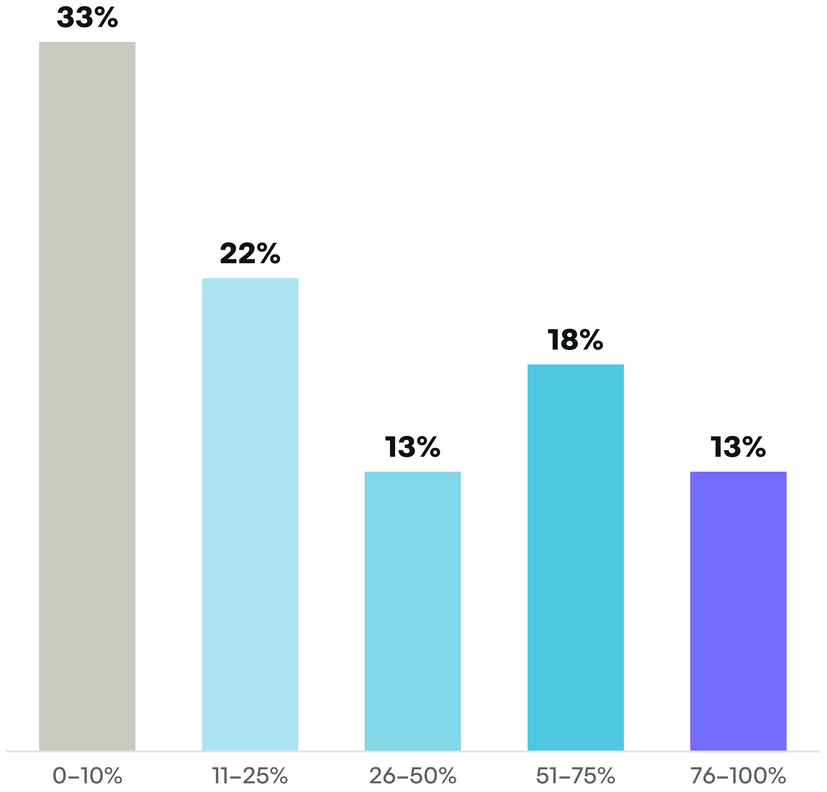
# Budget: direction & digital share

Half the market grew its budget (50.6%), 35.4% held it and 13.9% cut it. A third put a tenth or less into digital; one in eight puts in more than three quarters.

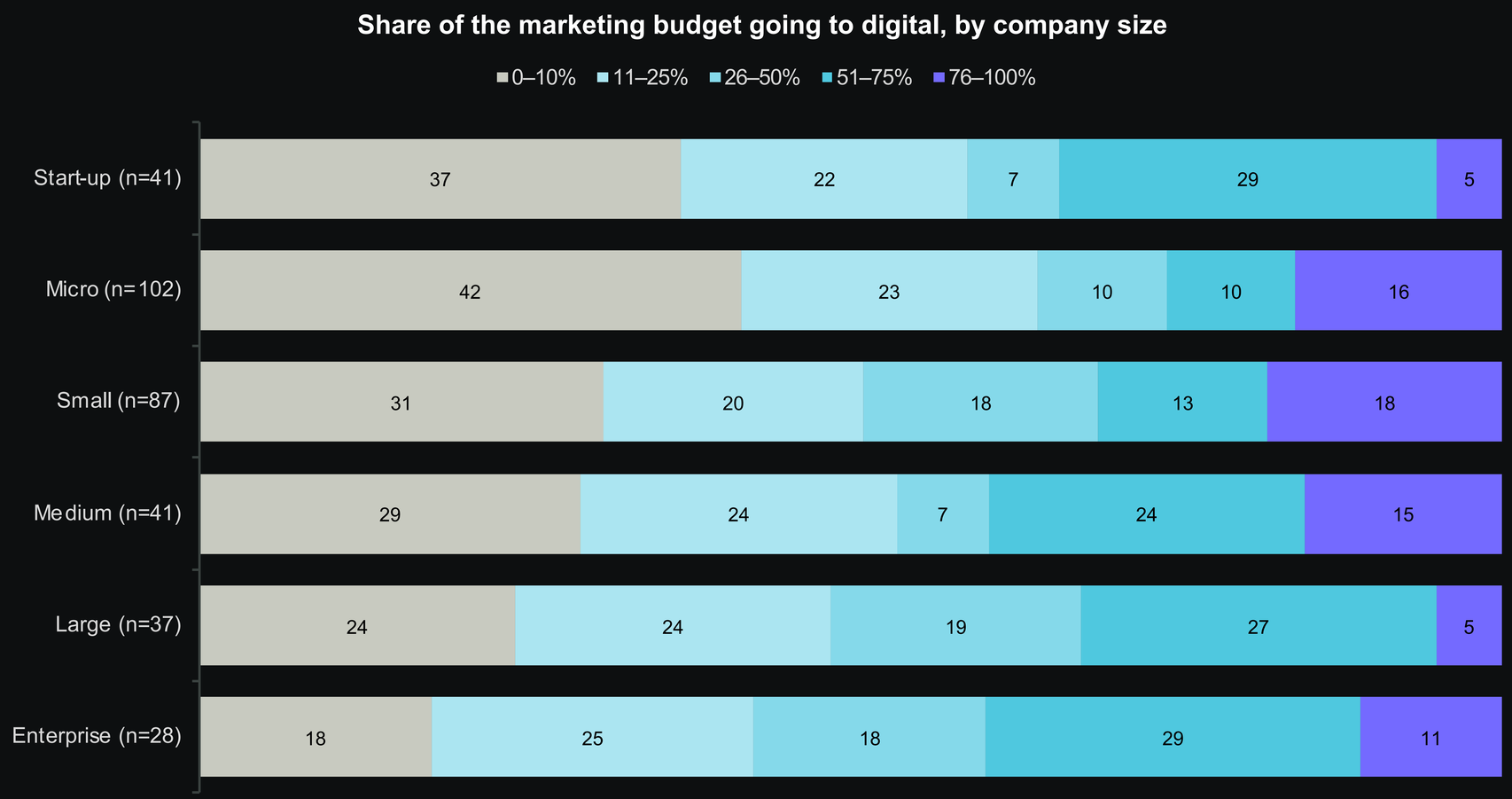
**Marketing Budget – Past 12 months**

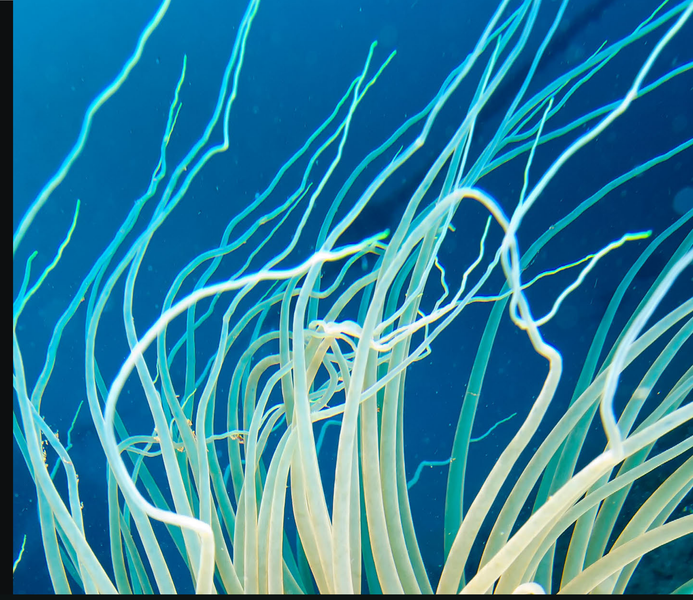



**Share of the marketing budget going to digital**



Size is a weak predictor of digital commitment. Micro businesses are the most likely to put a tenth or less into digital (42%), but every band spreads from under a tenth to almost all of it.



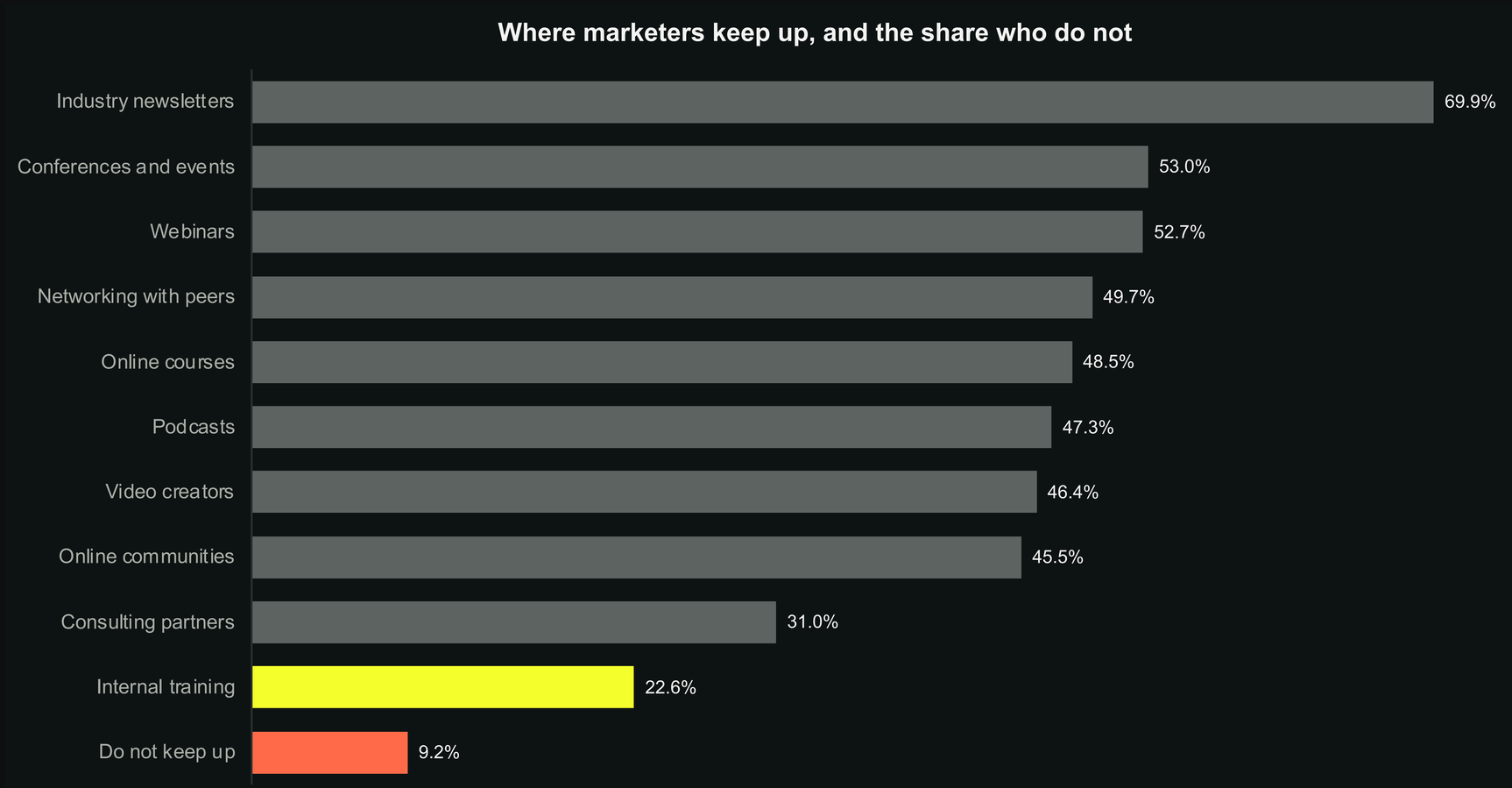



# Digital share by company size

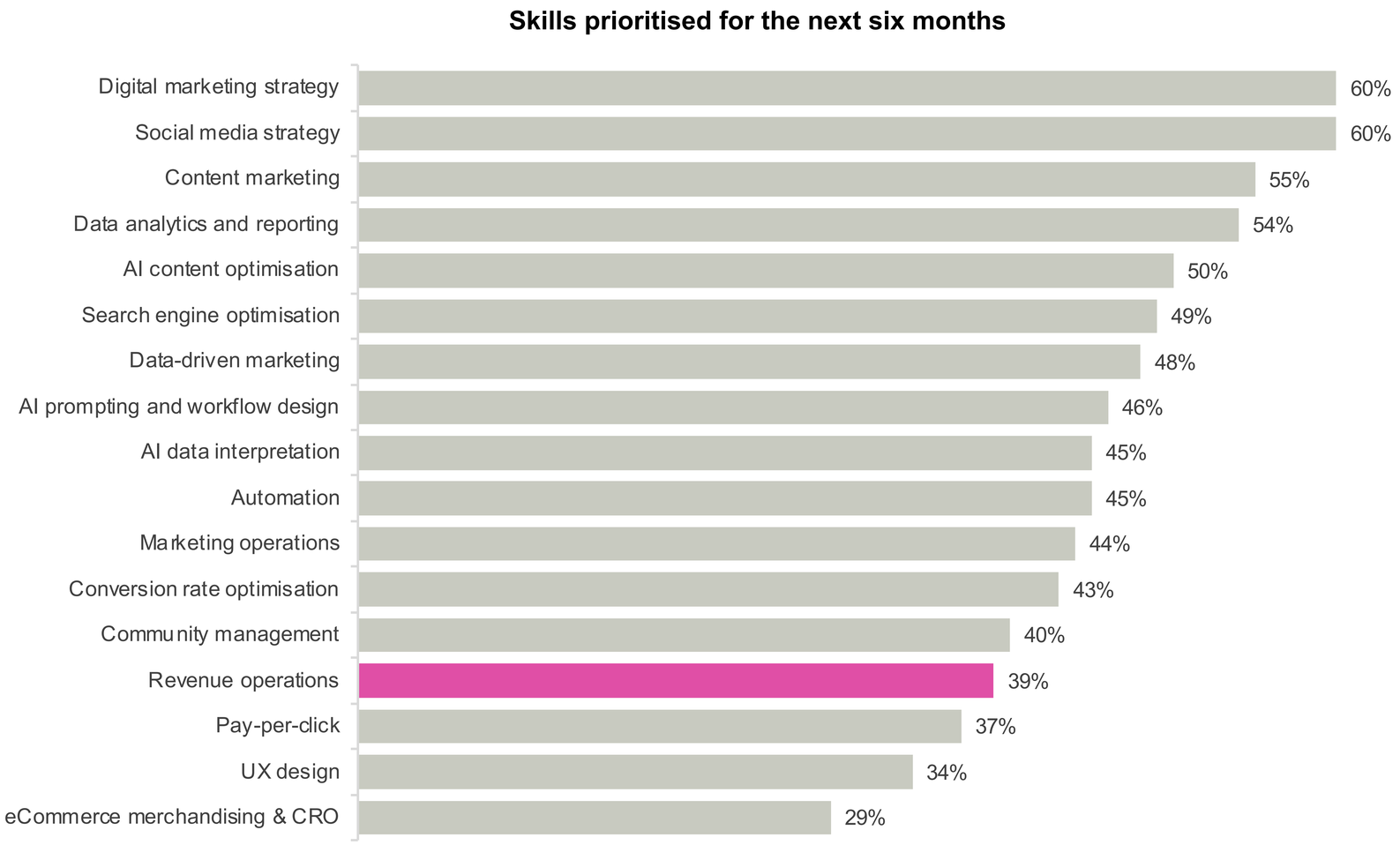
# Where marketers keep up

Insight 2027

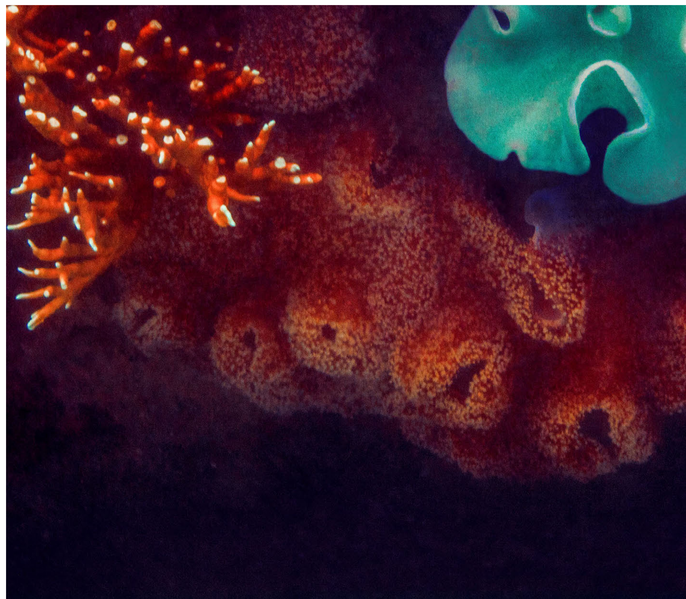
Only 9.2% do not actively keep up; the rest use 4.76 channels on average. Internal training reaches 22.6%: development is overwhelmingly self-directed and externally sourced.



Strategy leads, at 60%. Revenue operations sits fourteenth of seventeen at 39%, in a market where only one in four can attribute revenue to digital.

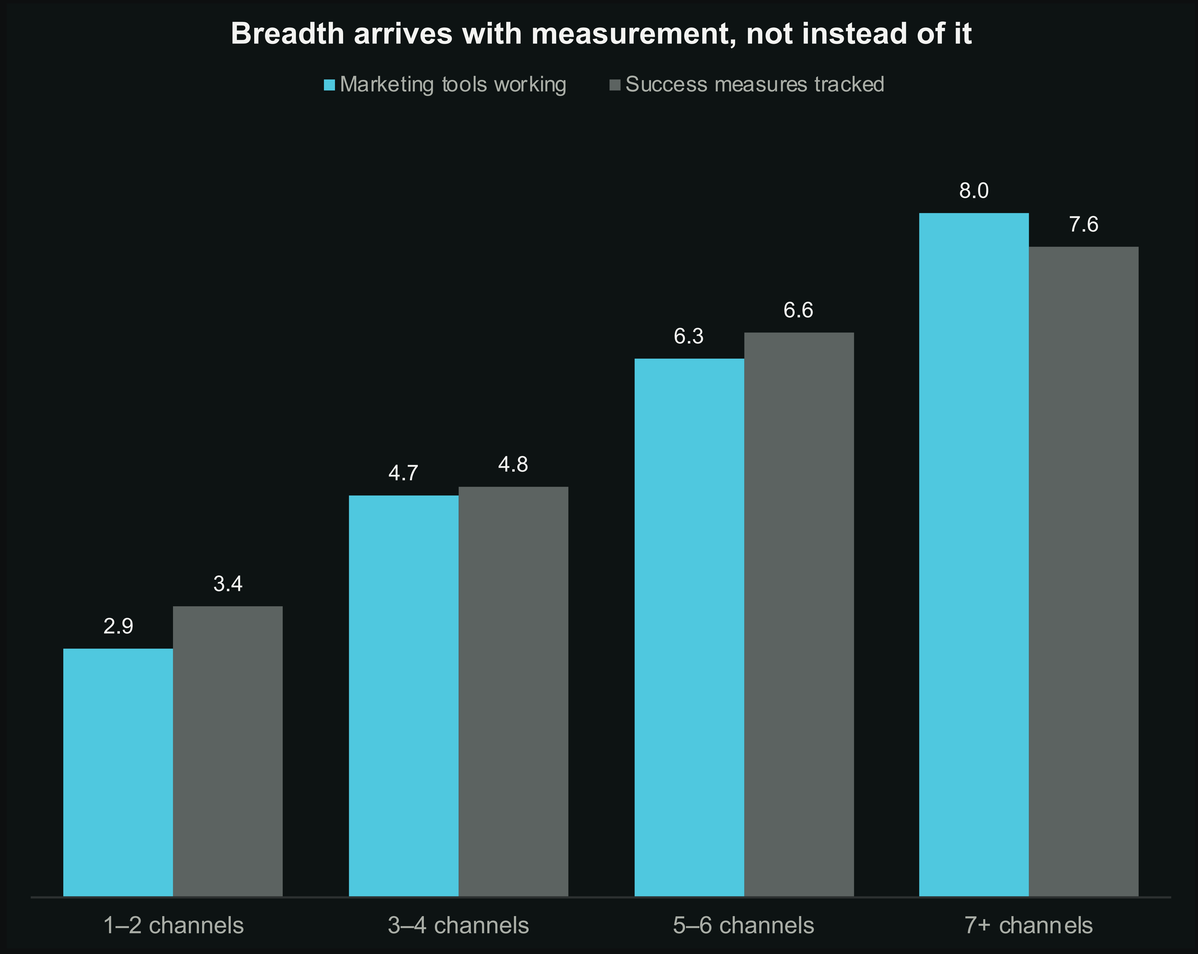


# Skills the market is prioritising



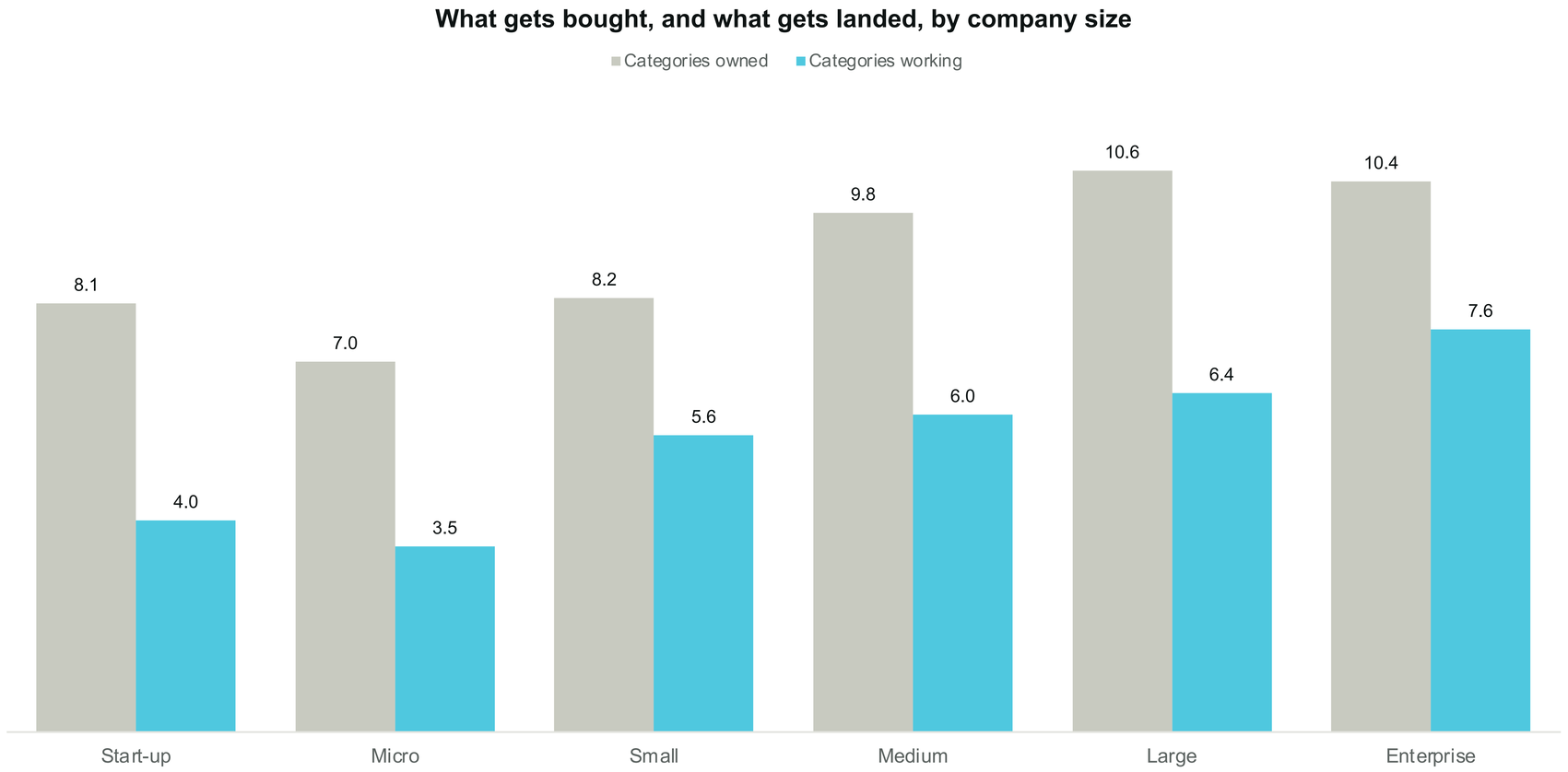
# Breadth arrives with measurement

Working tools rise from 2.9 to 8.0 and measures tracked from 3.4 to 7.6 as channel count rises; capability climbs from 33 to 58. There is no spray-and-pray segment.

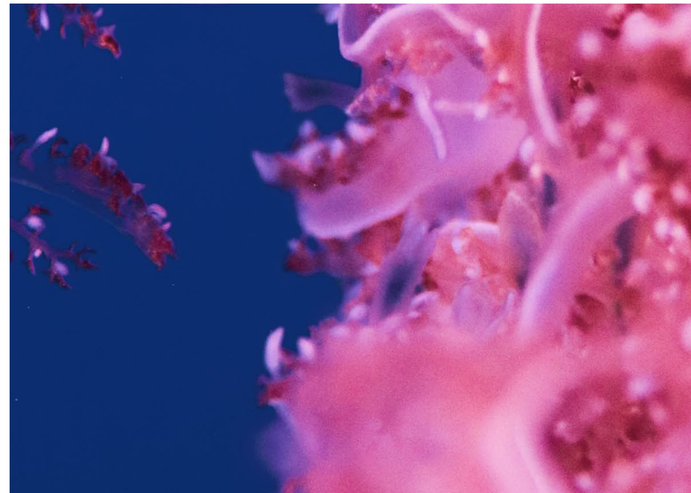


# Technology and AI

Ownership rises from 7.0 categories (micro) to 10.6 (large); the working count rises more slowly. Small businesses land a higher share than medium and large ones.

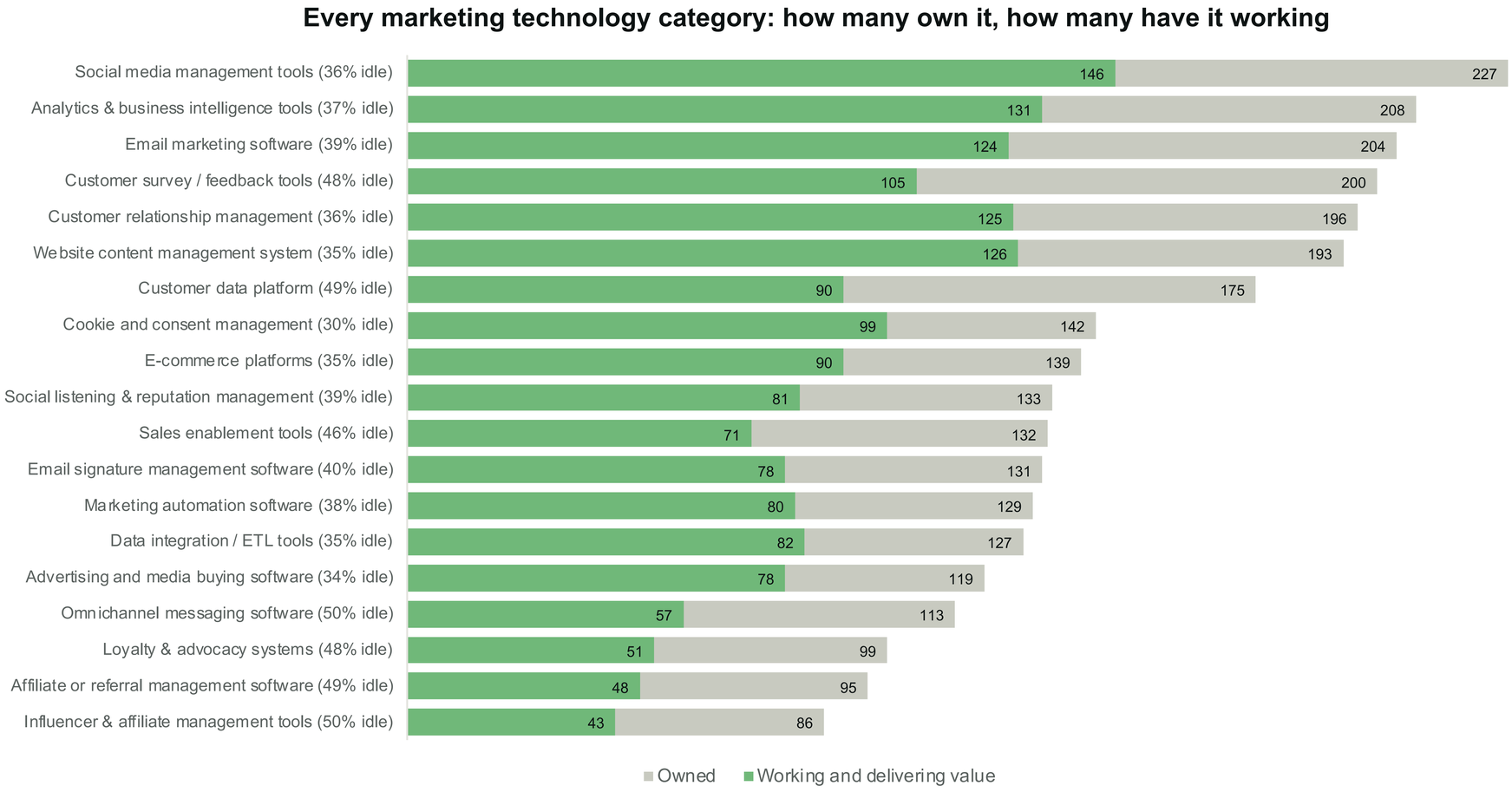


# What gets bought, and what gets landed, by company size

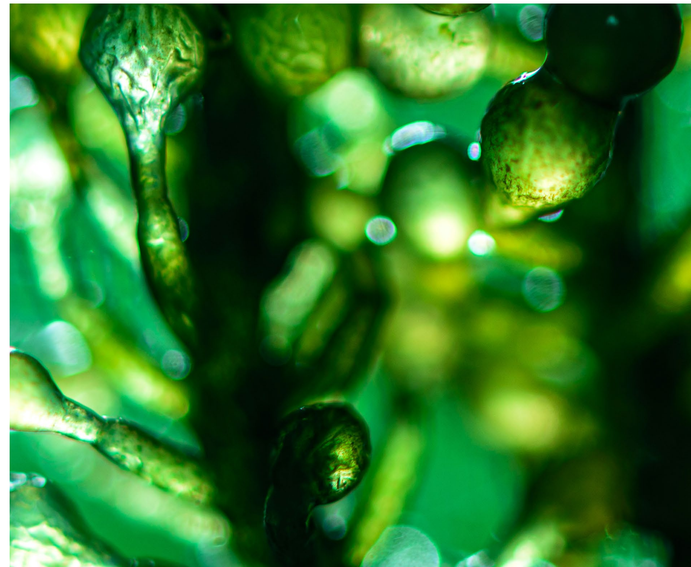


# Every MarTech category: owned against working

Core publishing, advertising and analytics tools land at around two thirds; relationship and retention tools at roughly half. Cookie and consent management is the most reliably implemented, 30% idle.

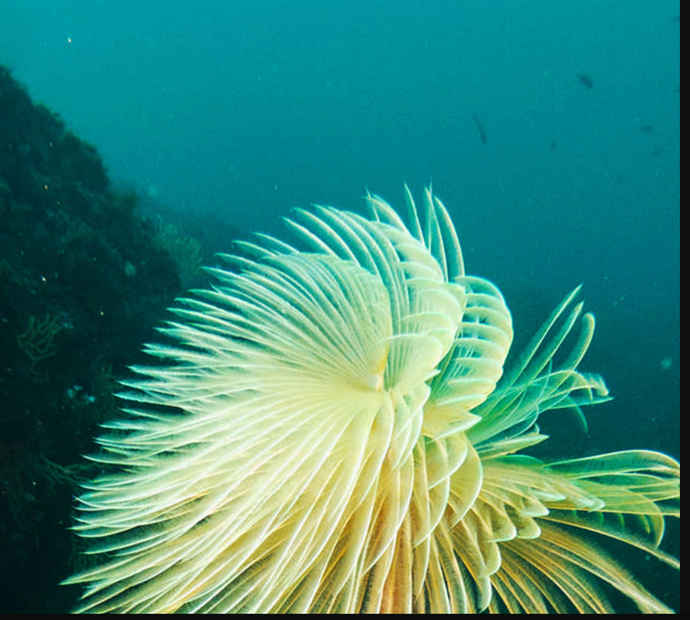


# MarTech owned, by company size



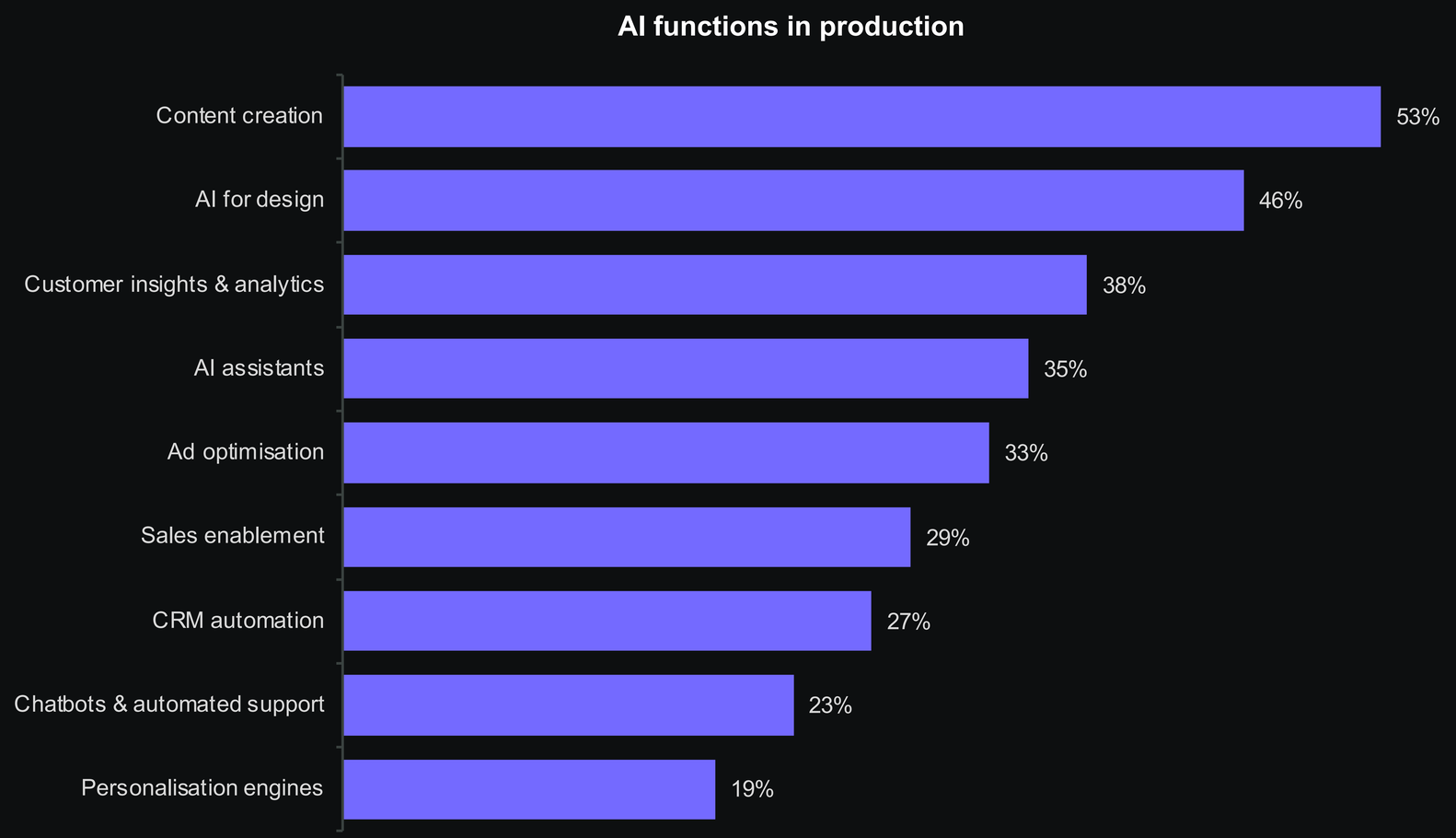
A size gradient survives correction on 10 of 19 tools, but it is not a ladder. On the core stack adoption peaks at Large or Medium and falls back at Enterprise: email marketing 84% to 61%.

| Category | Start-up n=41 | Micro n=102 | Small n=87 | Medium n=41 | Large n=37 | Enterprise n=28 |
|---|---|---|---|---|---|---|
| Social media management tools | 56% | 65% | 69% | 80% | 76% | 61% |
| Analytics & business intelligence tools | 56% | 56% | 60% | 66% | 73% | 79% |
| Email marketing software | 54% | 50% | 60% | 76% | 84% | 61% |
| Customer survey / feedback tools | 59% | 45% | 60% | 66% | 78% | 79% |
| Customer relationship management | 63% | 45% | 57% | 73% | 68% | 68% |
| Website content management system | 54% | 44% | 60% | 73% | 76% | 57% |
| Customer data platform | 51% | 42% | 49% | 66% | 68% | 57% |
| Cookie and consent management | 44% | 31% | 43% | 56% | 43% | 57% |
| E-commerce platforms | 44% | 38% | 38% | 34% | 51% | 57% |
| Social listening & reputation management | 29% | 35% | 37% | 39% | 59% | 54% |
| Sales enablement tools | 39% | 32% | 34% | 49% | 51% | 50% |
| Email signature management software | 32% | 27% | 36% | 46% | 70% | 50% |
| Marketing automation software | 32% | 34% | 40% | 49% | 35% | 46% |
| Data integration / ETL tools | 41% | 30% | 36% | 44% | 41% | 54% |
| Advertising and media buying software | 39% | 27% | 36% | 37% | 43% | 46% |
| Omnichannel messaging software | 39% | 27% | 30% | 34% | 51% | 36% |
| Loyalty & advocacy systems | 27% | 25% | 29% | 32% | 30% | 46% |
| Affiliate or referral management software | 27% | 24% | 28% | 32% | 30% | 43% |
| Influencer & affiliate management tools | 24% | 21% | 21% | 32% | 35% | 39% |

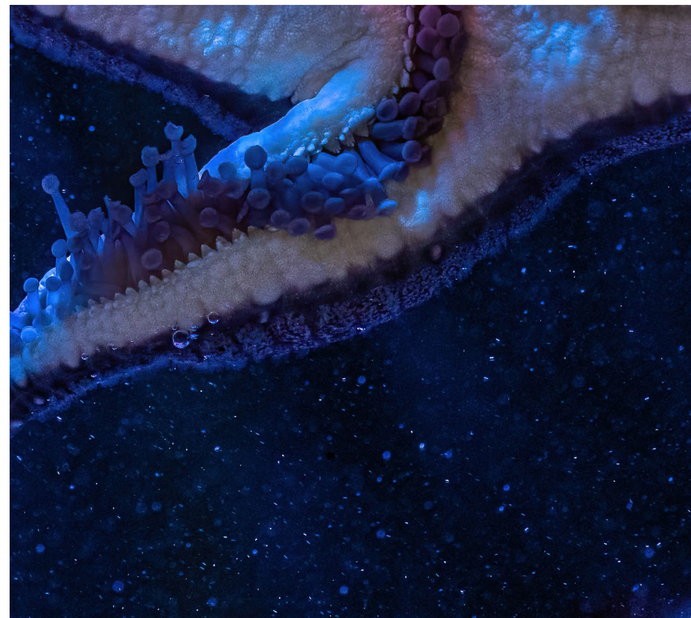


# What AI is actually live

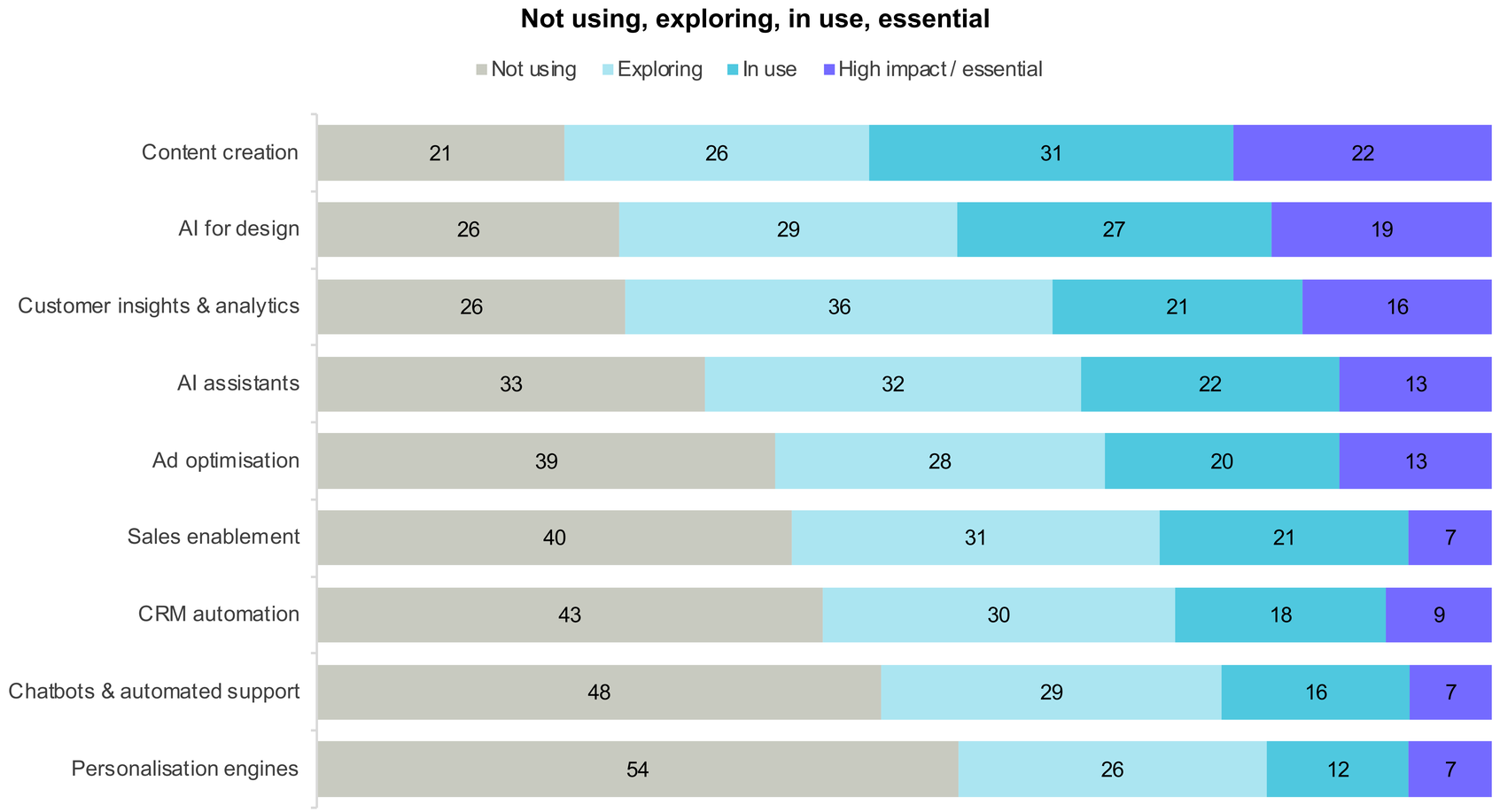
Content creation is the only AI function in production at more than half the market (53%). Personalisation engines sit at 19%. The market averages 3.0 functions live.



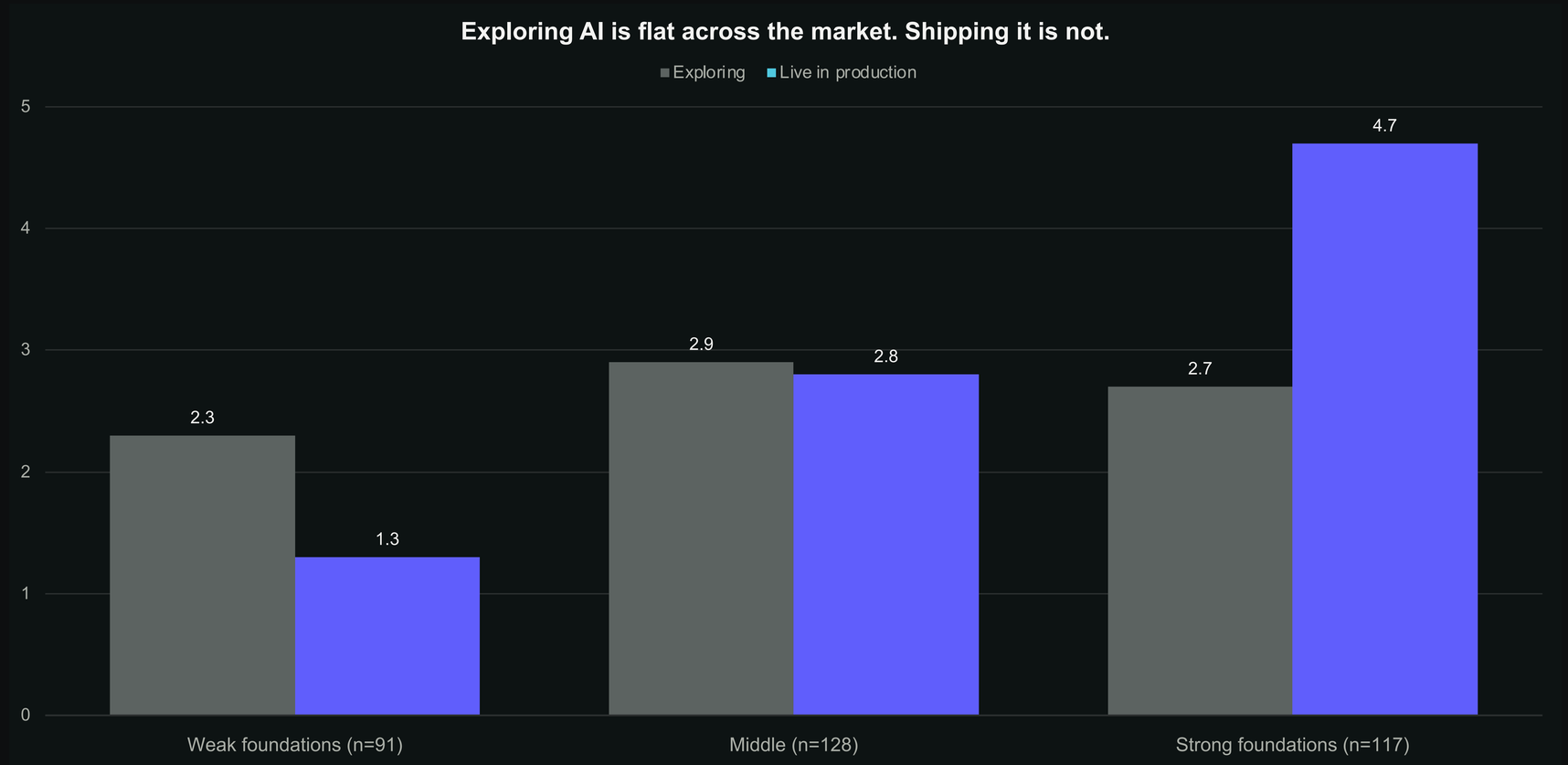
# AI usage in full



Not using is still the largest single band on six of nine functions, and on eight of nine a majority is either not using or only exploring. Content creation is the exception.



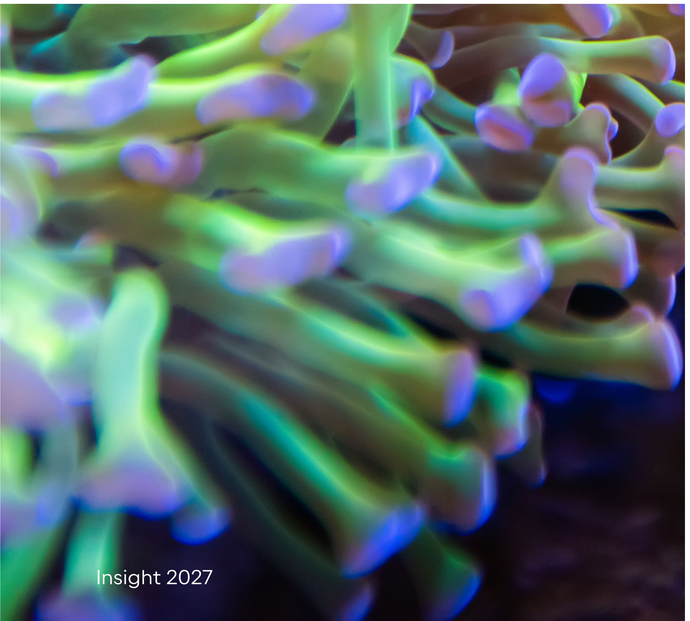
Exploration is flat across foundations (correlation 0.045). Functions live in production rise from 1.3 to 4.7 (correlation 0.522). AI multiplies existing capability; it does not replace it.



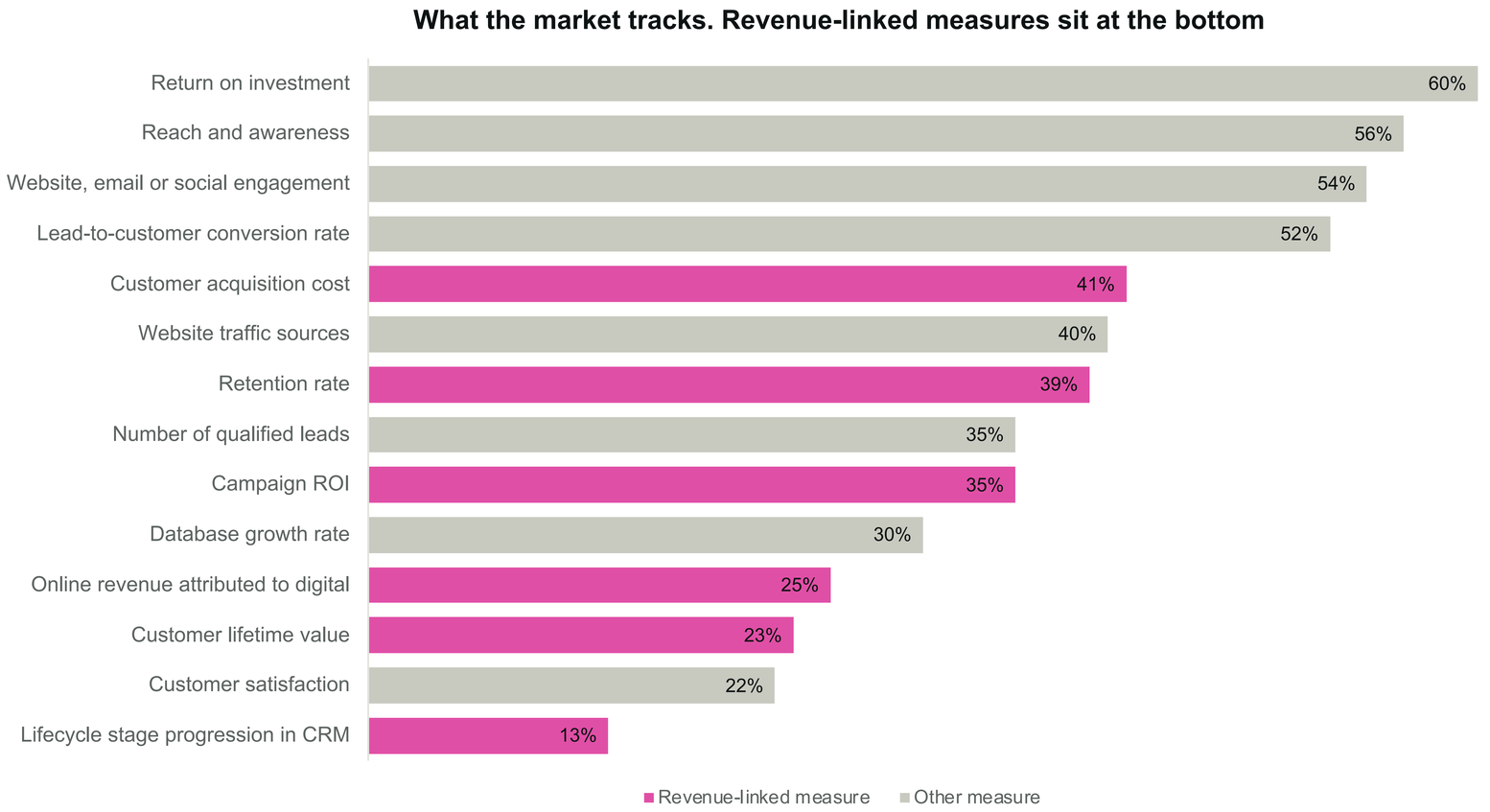
**Everyone is exploring AI. Only the equipped are shipping it.**

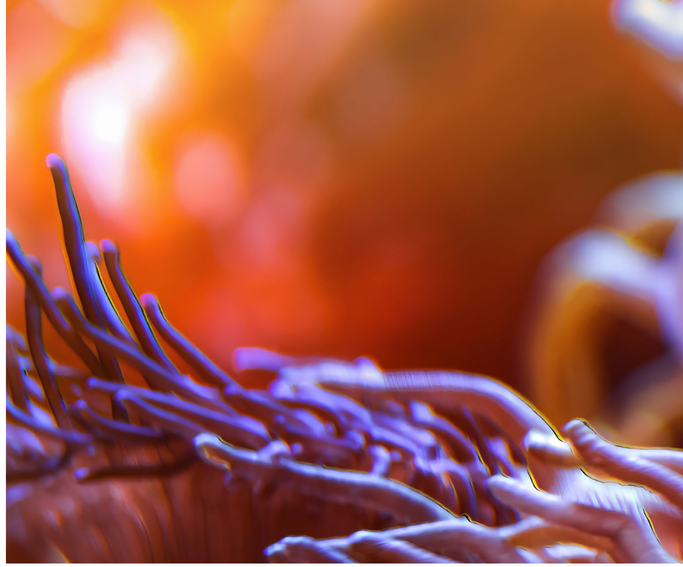
# Measurement

# What the market tracks



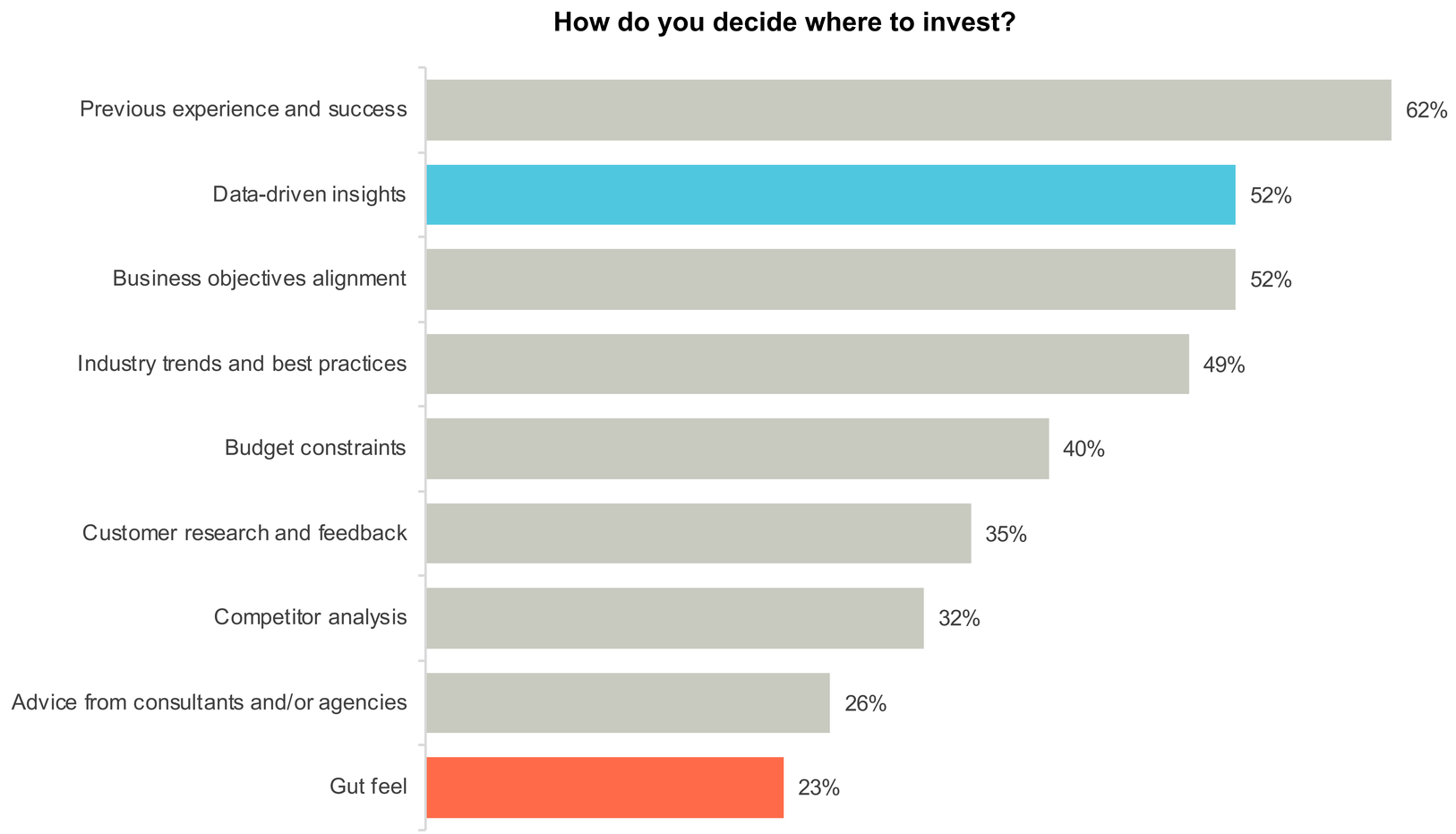
Six in ten track ROI, but only one in four can attribute revenue to digital and one in eight tracks lifecycle stage in a CRM. Much of the reported ROI is estimated rather than calculated.





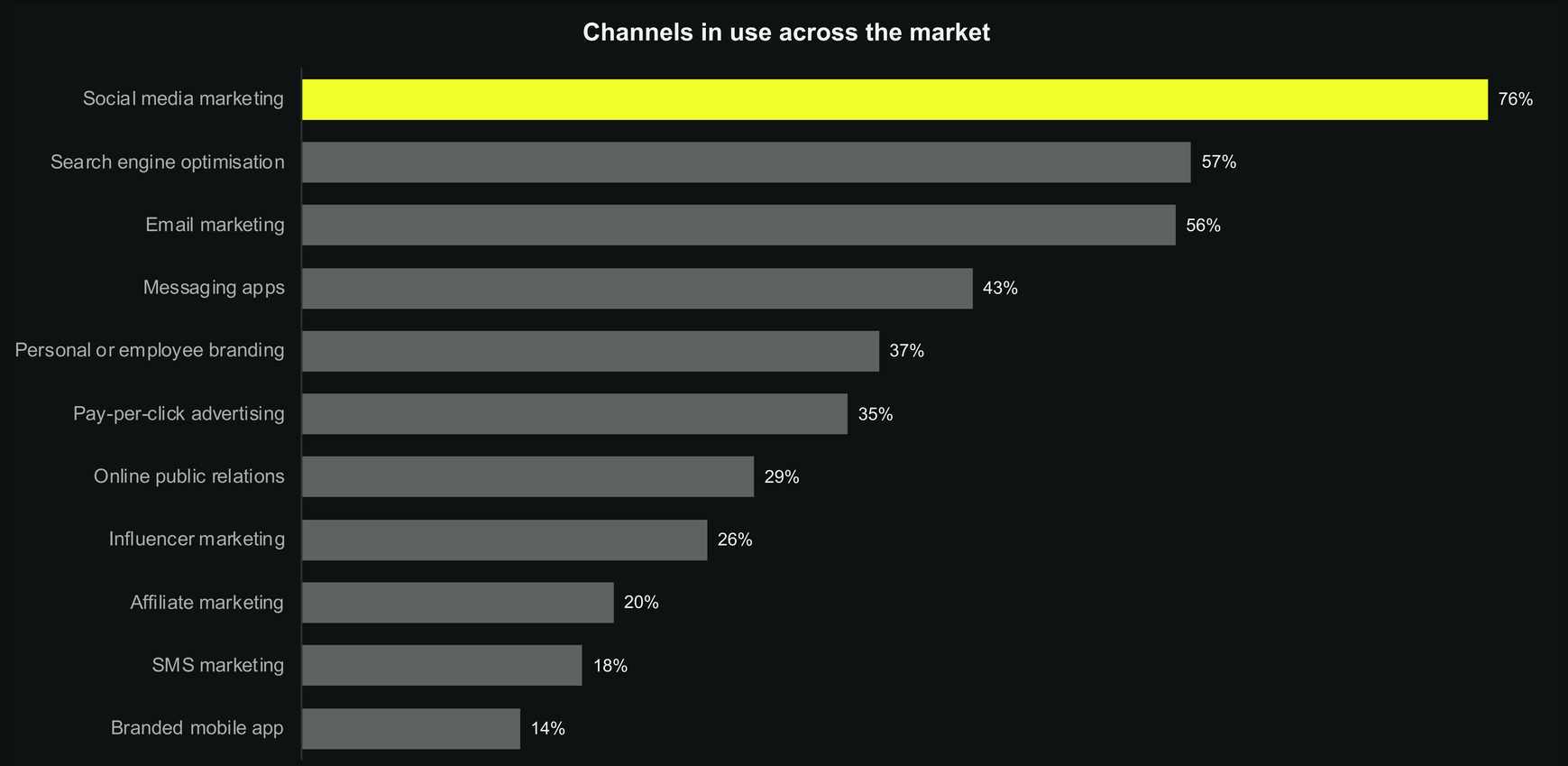
# How investment gets decided

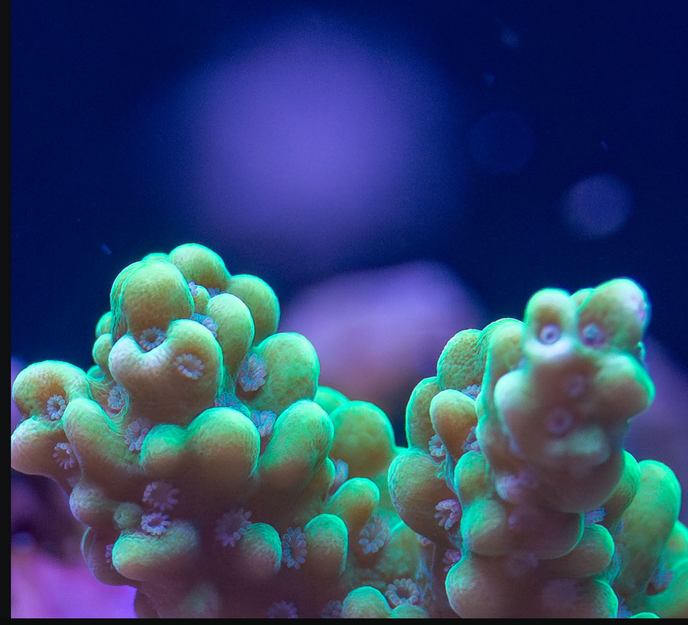
Previous experience (62%) outranks data-driven insight (52%). Gut feel is named by 23%, close to the 26% who lean on consultants or agencies.



# Channels, platforms and content

Social media marketing reaches three quarters of the market; search and email a little over half. Branded mobile apps and SMS sit in the teens, with affiliate marketing at 20%.

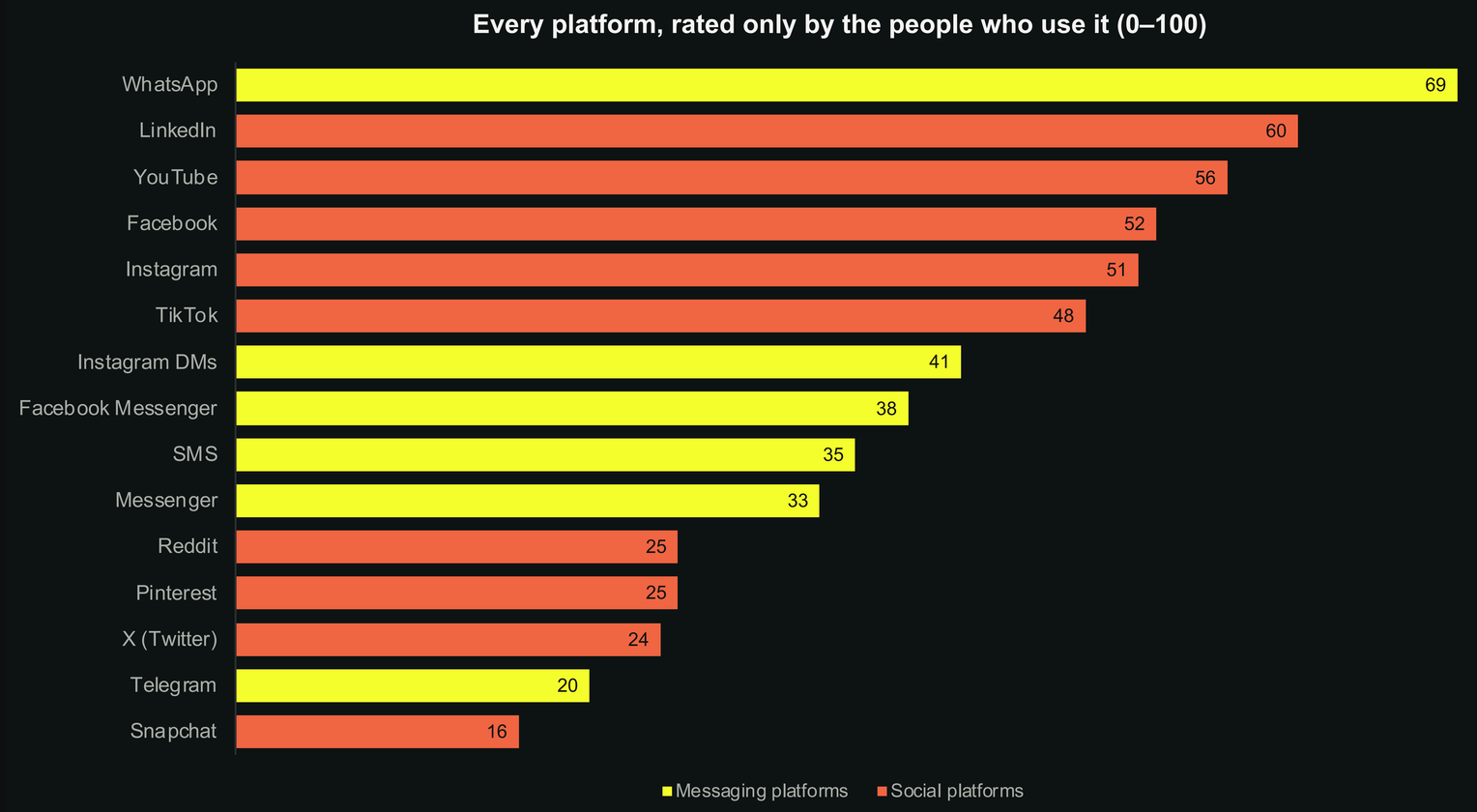


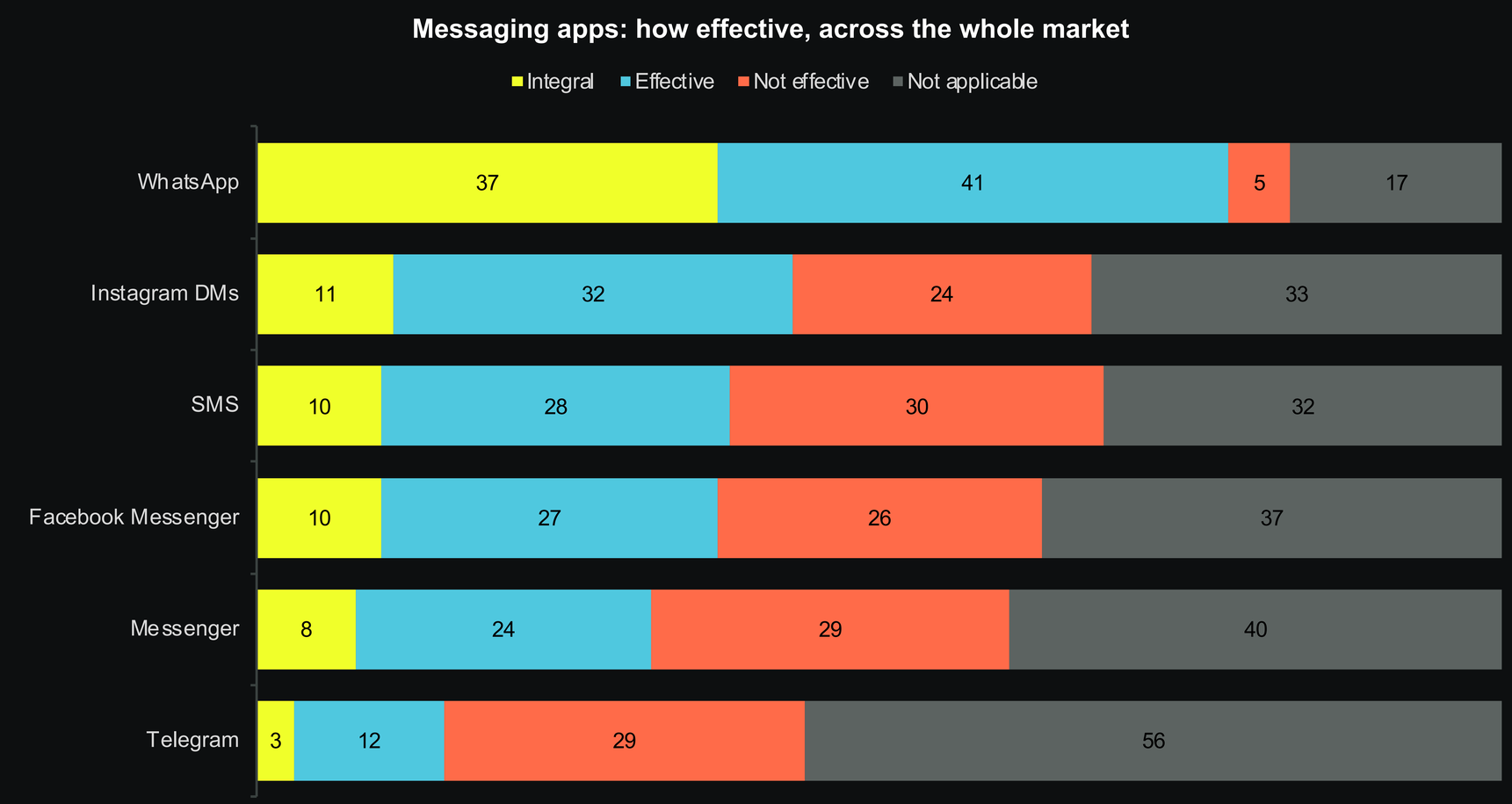
# Channels in use

# Every platform, rated only by the people who use it

WhatsApp is the most effective platform in this market, ahead of LinkedIn and well ahead of the feed platforms. 37% of the whole sample calls WhatsApp integral, the highest integral rating in the survey.



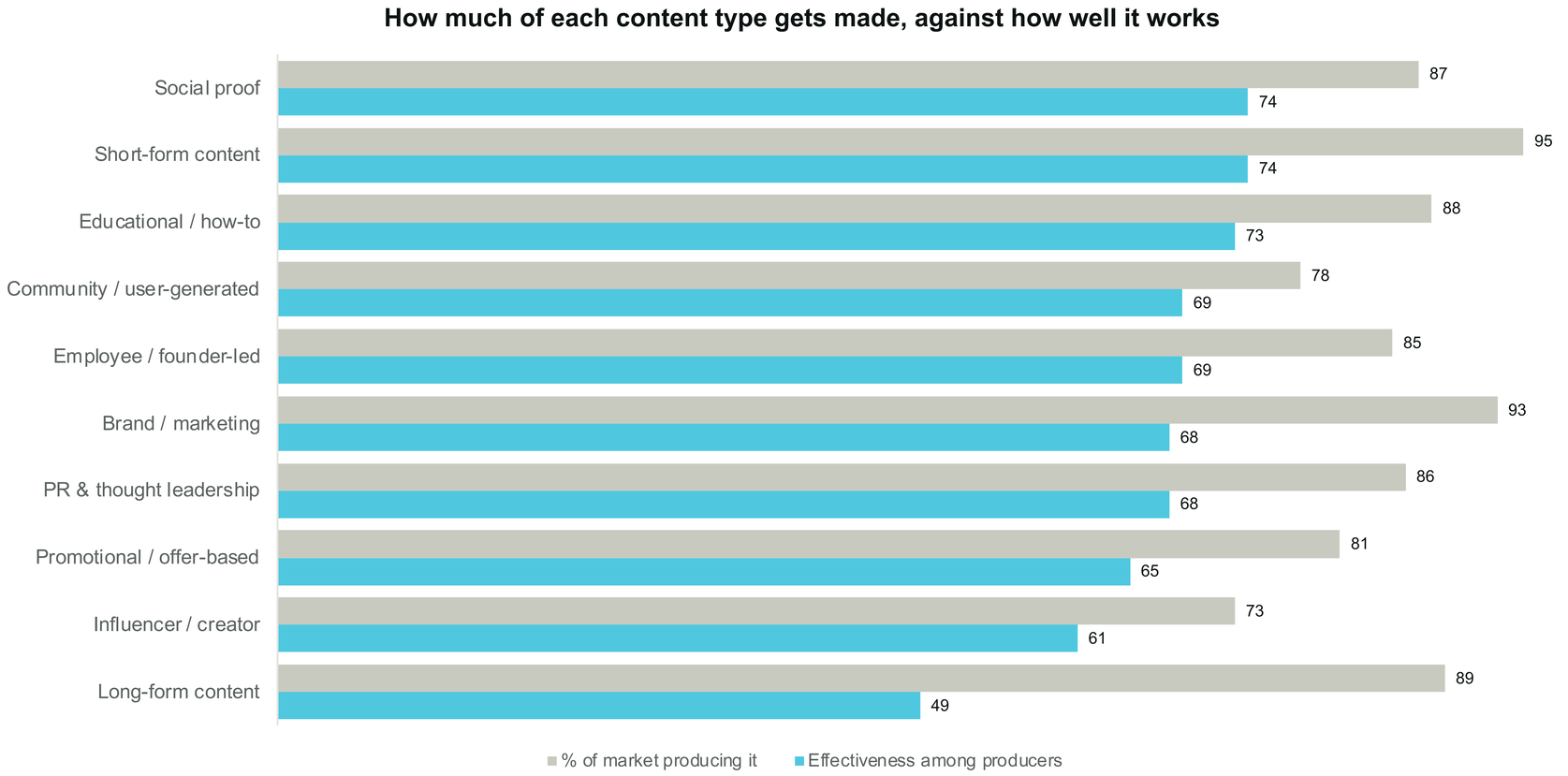
83% of the market rates WhatsApp at all and 78% call it integral or effective. No other messaging app gets past 43% on that line; Telegram is not applicable for 56%.



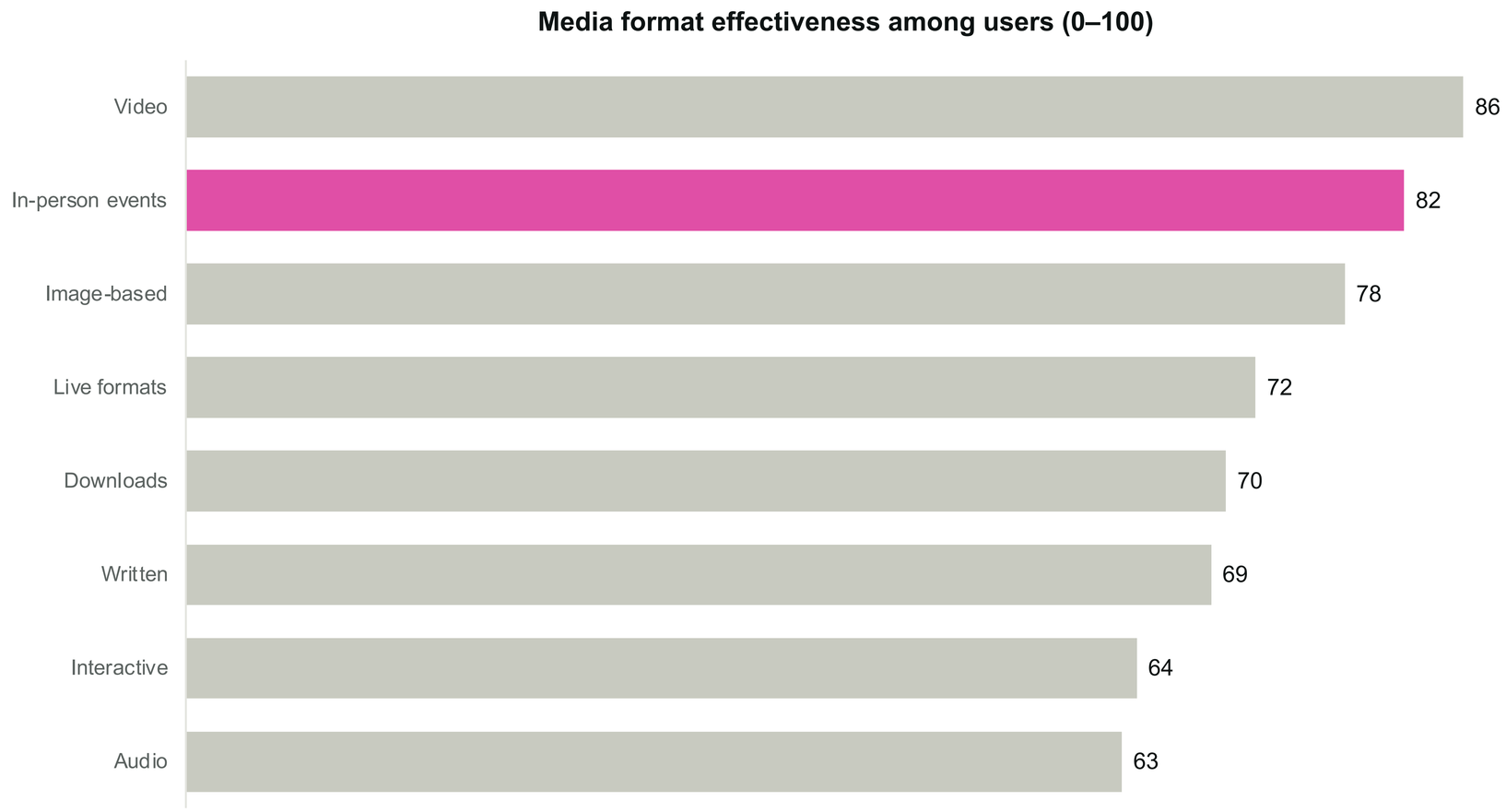
# Messaging apps: who calls them integral

# The content we make most of works least well

Long-form is produced by 89% of the market and rated last of ten types: a 40-point gap between production and effectiveness. The next widest gap is 25.



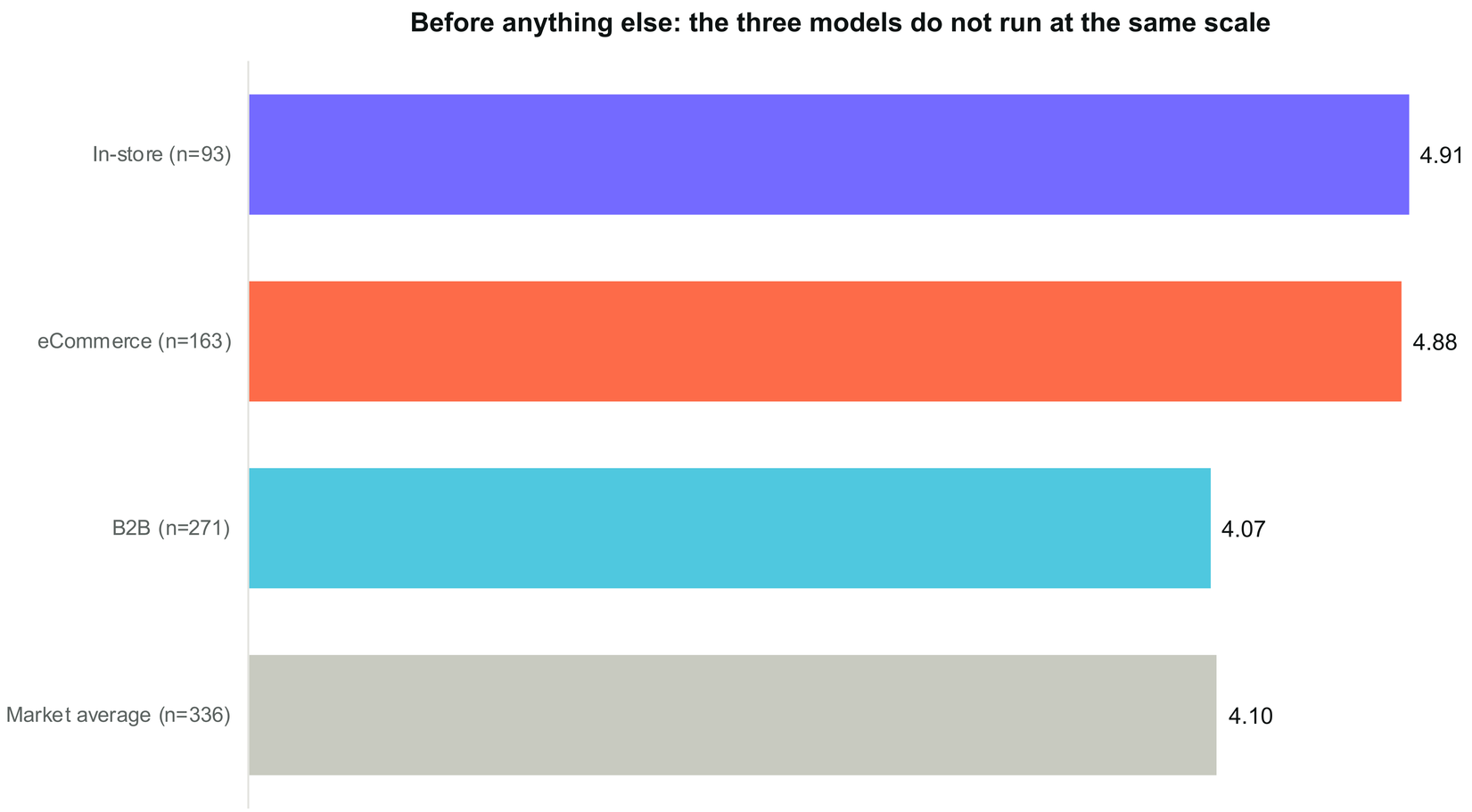
In a digital marketing survey, the second most effective media format is being in a room with people. In-person events score 82 against video at 86; only 14% marked them not applicable.



# The quiet finding: the room still works

# B2B, eCommerce and In-store

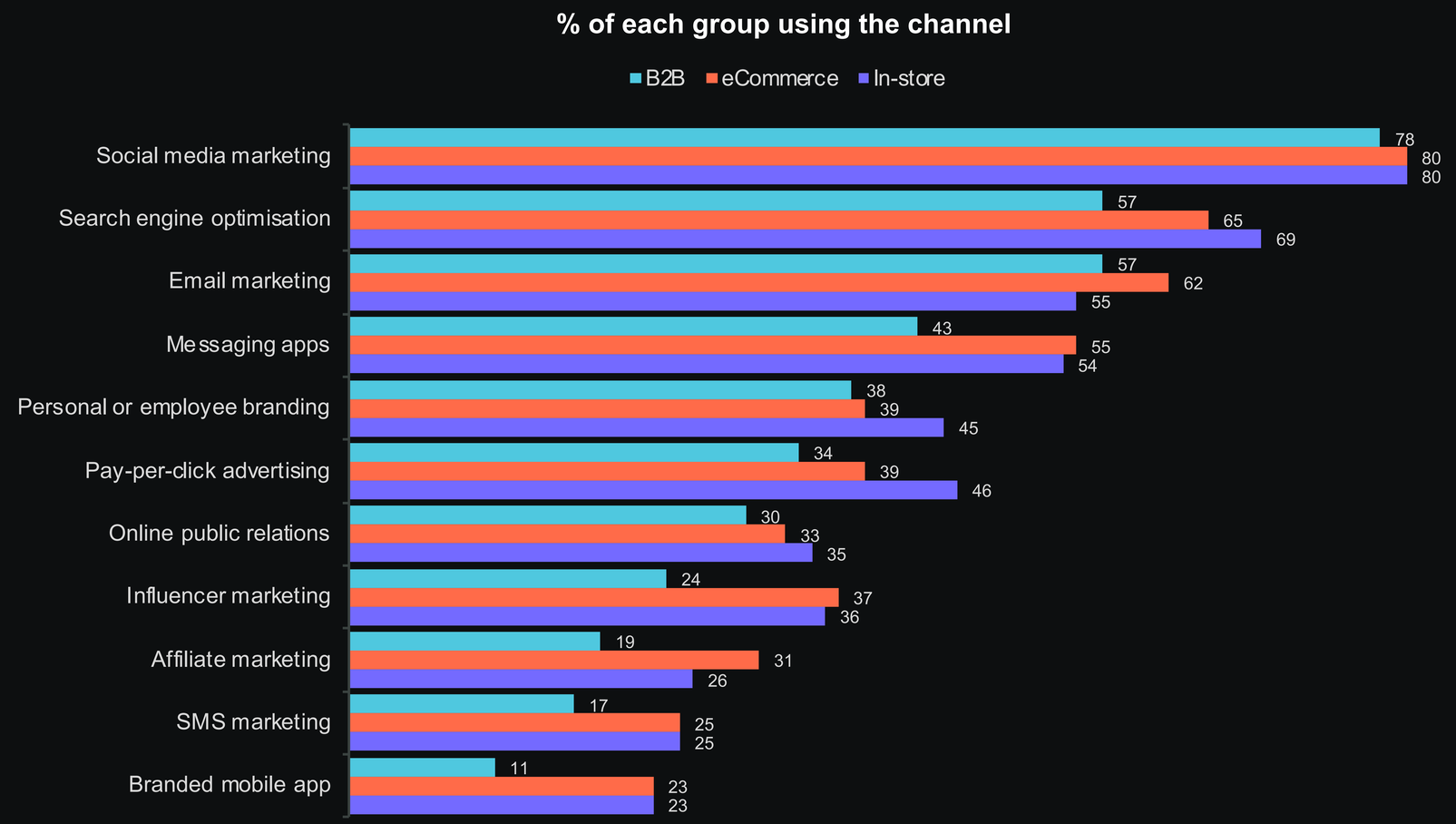
eCommerce and in-store run 4.9 channels against B2B's 4.1, so they appear to lead on almost every row. Across 133 questions, 15 differences survive correction; hold breadth constant and one does.



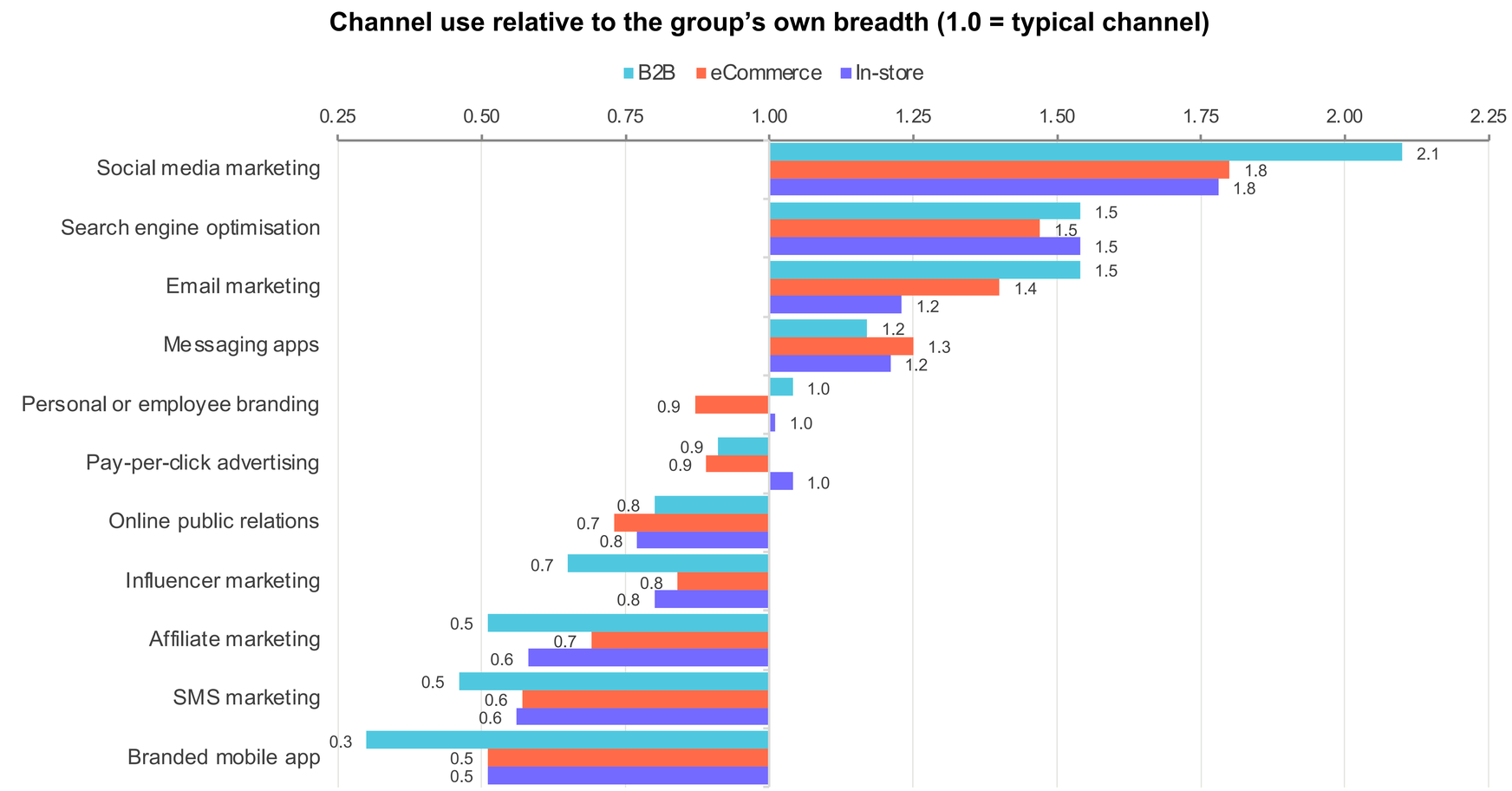
# First, the trap: the three models do not run at the same scale

# Channel use by business model

B2B is lowest on ten of eleven channels; email is the exception. Read this as breadth (4.9 channels against 4.1), not preference. The next page takes breadth out.



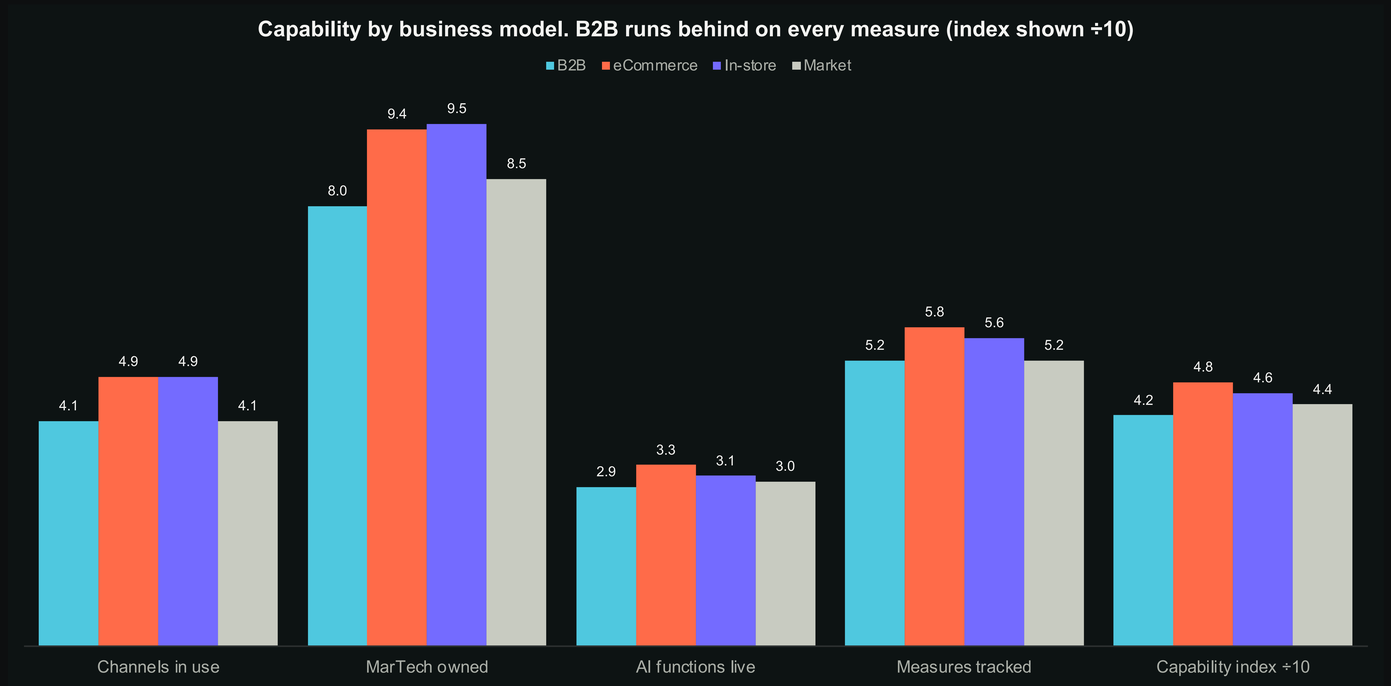
Indexed against each group's own channel average, 1.0 is a typical channel for that group. Ten of 33 differences survive correction, and three of those ten are the branded app.



# The same data, breadth taken out

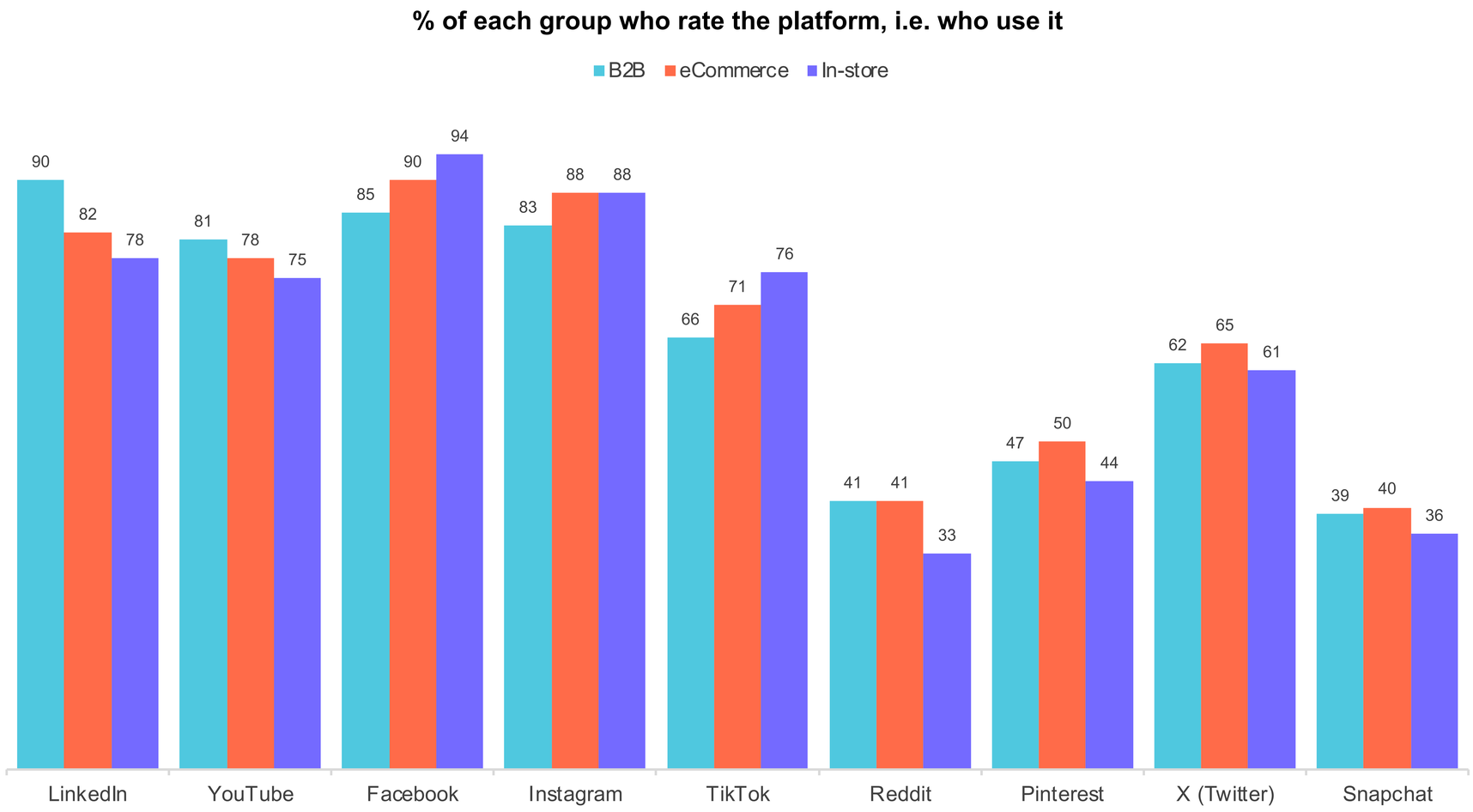
# B2B is the narrow one

B2B runs fewer channels, owns less technology and measures less. The six-point capability gap with eCommerce holds after breadth control and comes from data foundations and measurement.

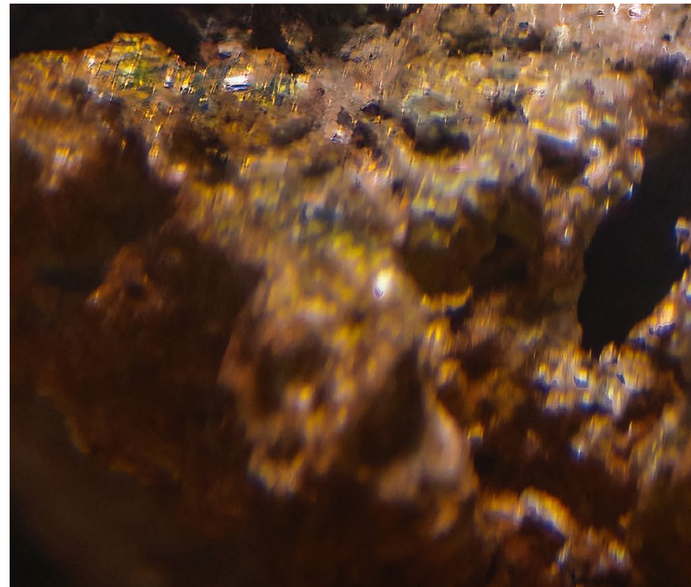



| Measure | B2B | eCommerce | In-store | Market |
|---|---|---|---|---|
| Marketing channels in use | 4.1 | 4.9 | 4.9 | 4.1 |
| MarTech categories owned | 8.0 | 9.4 | 9.5 | 8.5 |
| AI functions in production | 2.9 | 3.3 | 3.1 | 3.0 |
| Success measures tracked | 5.2 | 5.8 | 5.6 | 5.2 |
| Data foundations, 0 to 100 | 47 | 53 | 53 | 50 |
| **Capability index, 0 to 100** | **42** | **48** | **46** | **44** |

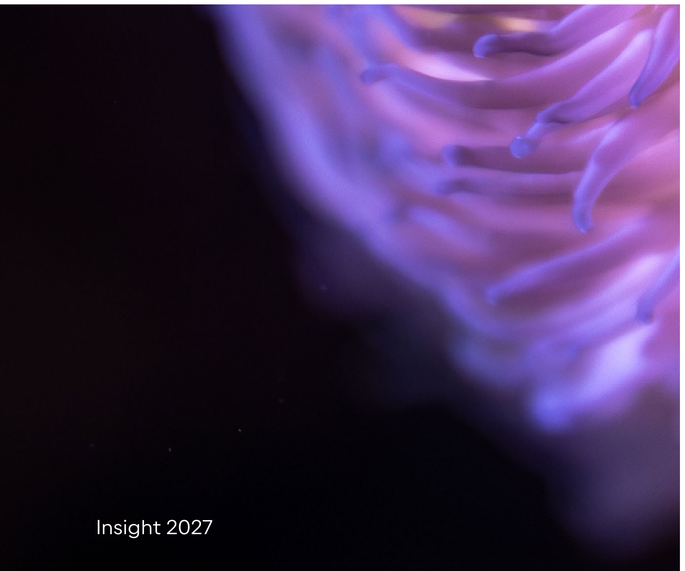
Usage, not effectiveness. B2B leads on LinkedIn (90%) and YouTube; in-store leads on Facebook and TikTok. Reddit and Snapchat stay at or below about four in ten for every model.



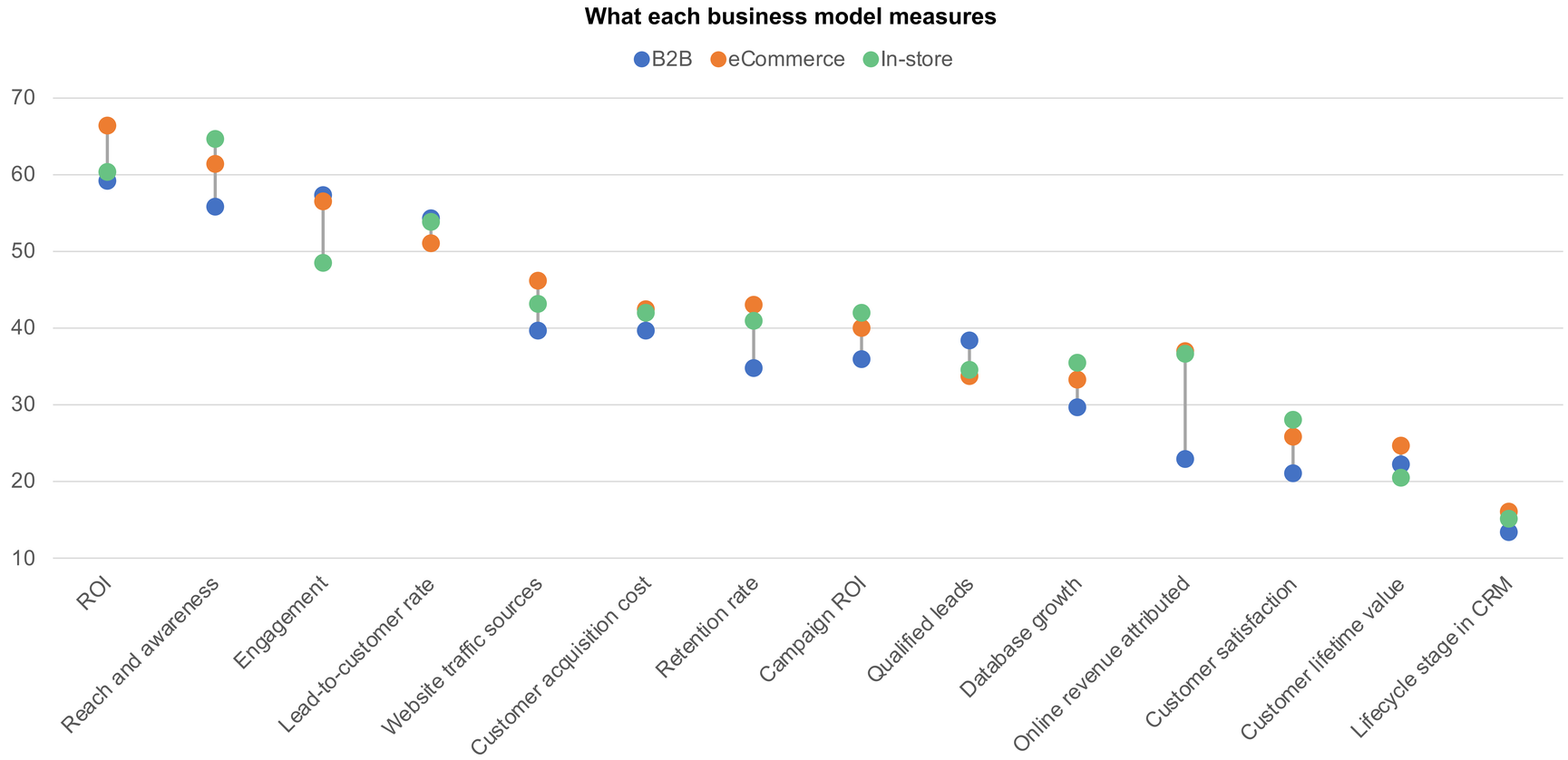
# Who uses which social platform



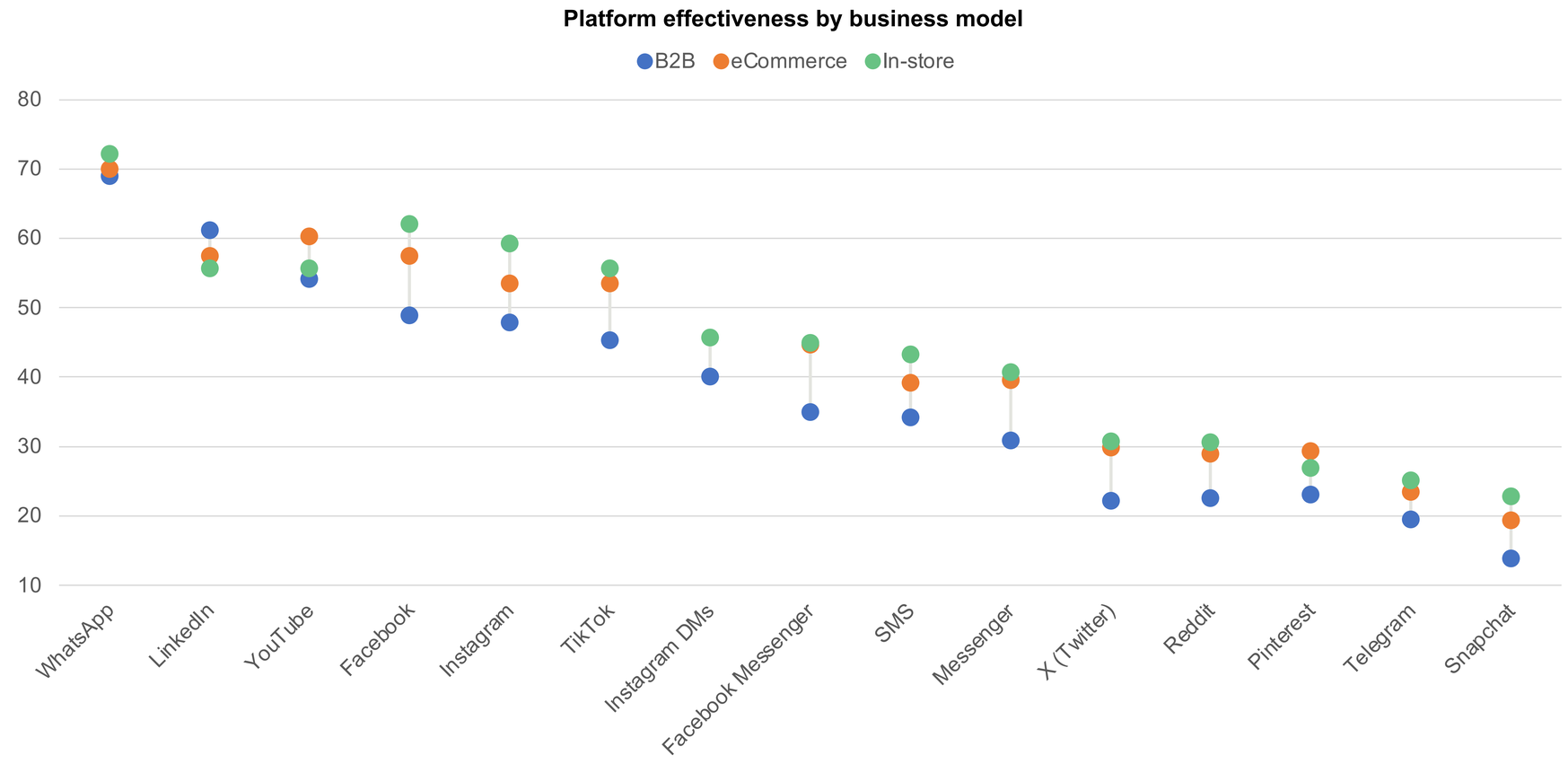
# What each business model measures



Among online sellers, 37% can attribute revenue to digital; among B2B, 23%. B2B tracks qualified leads more and retention less. Lifecycle progression is the shared blind spot.



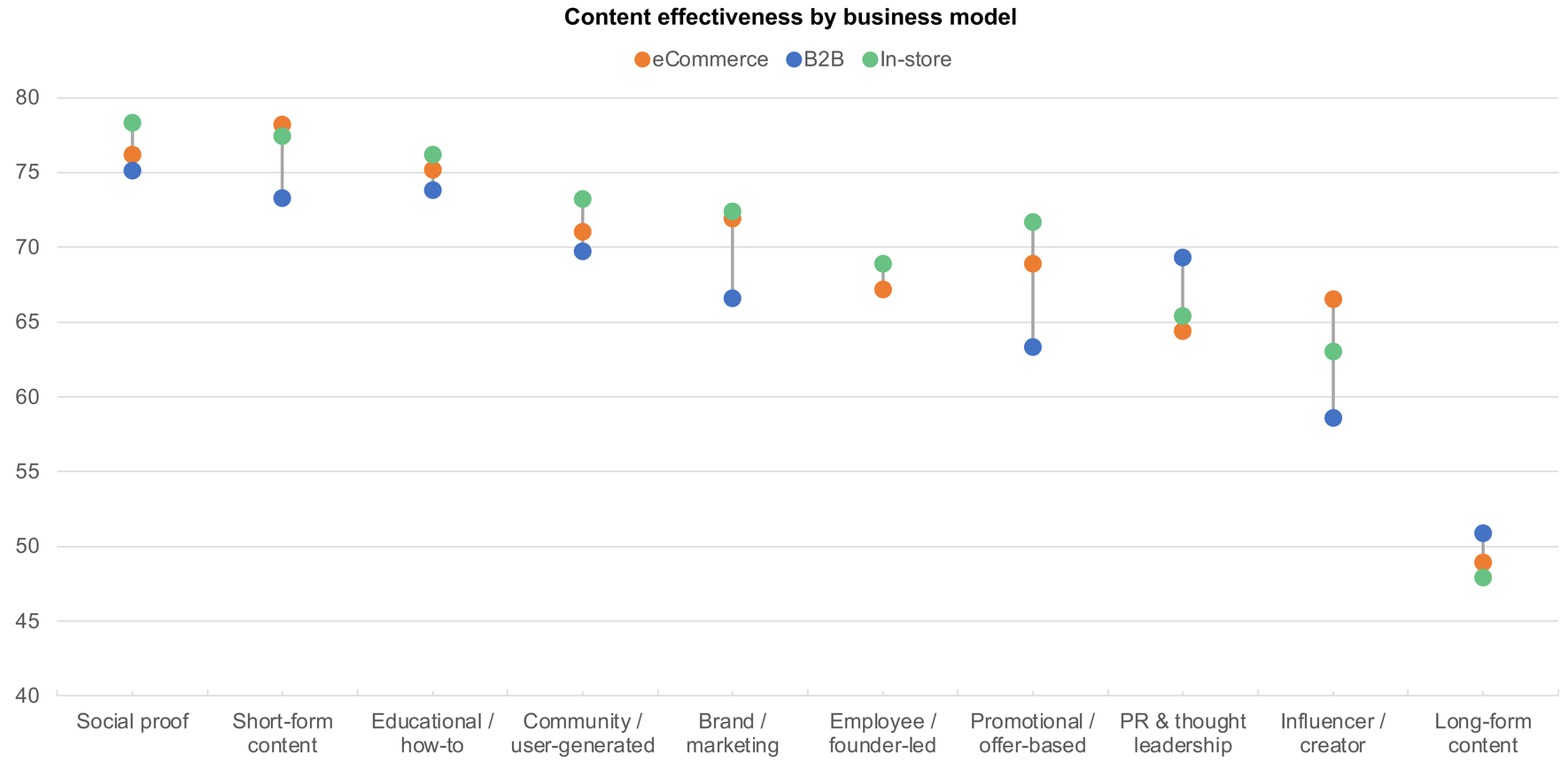
LinkedIn is the one platform B2B rates highest. Instagram is the mirror image: 48 among B2B against 59 in-store, and it holds after a breadth control. WhatsApp leads for all three.



# Platforms: one real split, and a lot of noise

# Content: the same hierarchy, with one exception

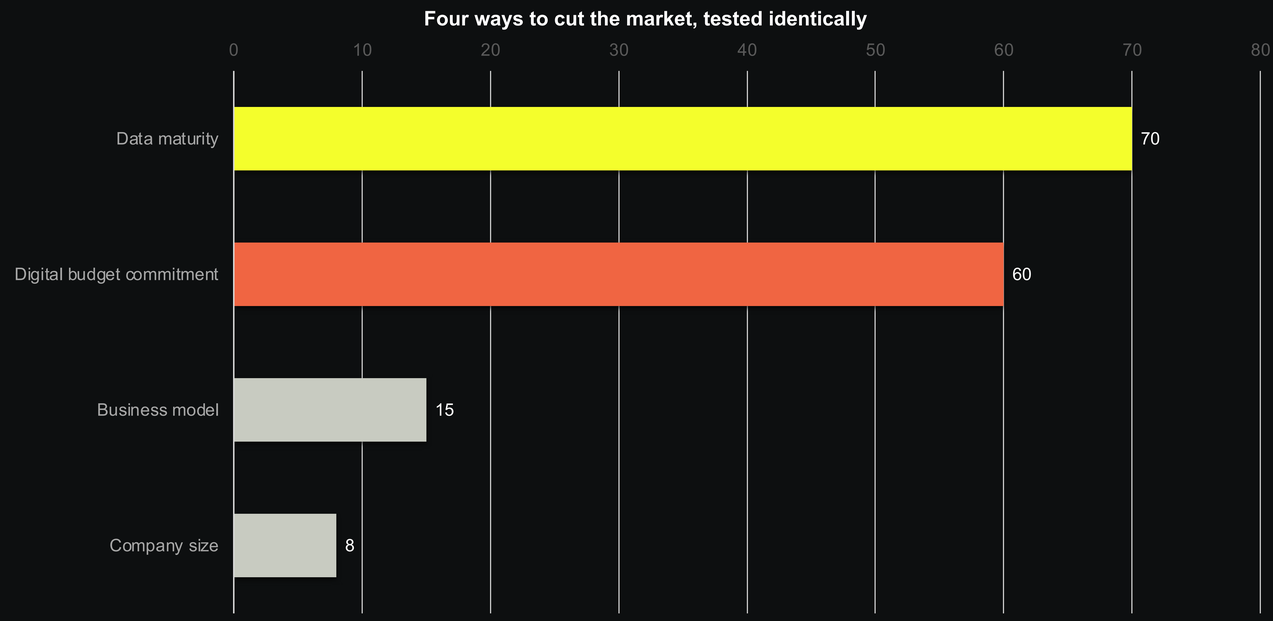
The order barely moves between models. B2B rates promotional content lowest and thought leadership highest; influencer content shows the widest spread.



# The divides that matter

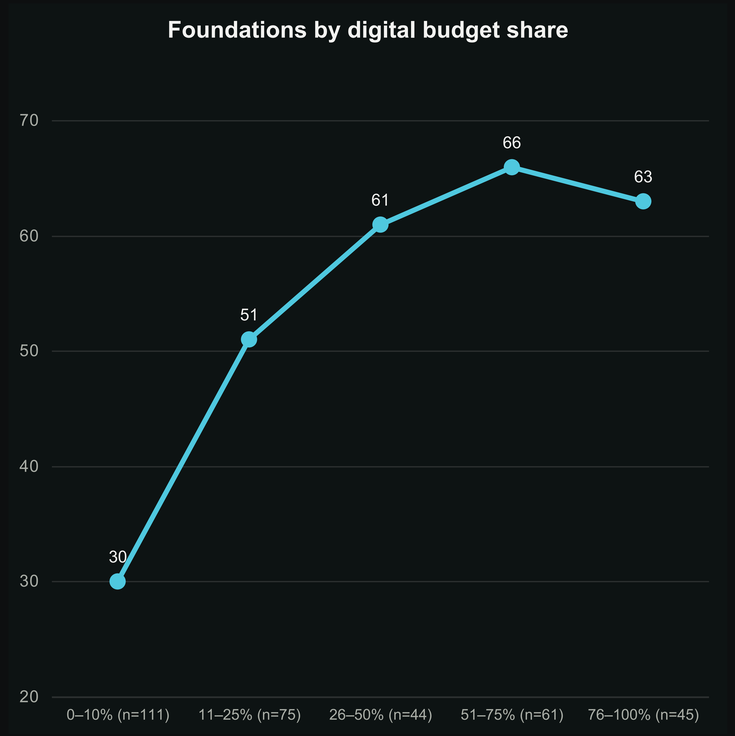
# Four ways to cut the market, tested identically

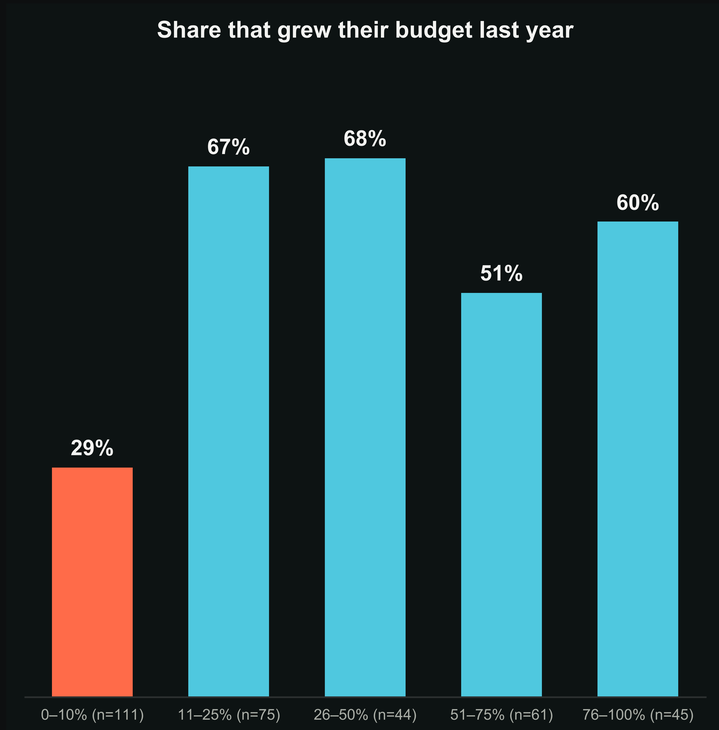
The same 133 questions and the same correction applied to four lenses. Company size separates 8; business model 15 (1 after breadth control); digital commitment 60; data maturity 70.




| How you cut the market | Questions it separates | Verdict |
|---|---|---|
| Company size | 8 | Comfortable, and nearly useless |
| Business model | 15 (1 after breadth control) | Describes mix, not capability |
| Digital budget commitment | 60 | Strong, and actionable |
| **Data maturity** | **70** | **Strongest single divide in the survey** |

Not a gradient but a cliff at the bottom. Foundations jump from 30 to 51 between the first two bands, and the bottom band was least likely to grow its budget (29%).



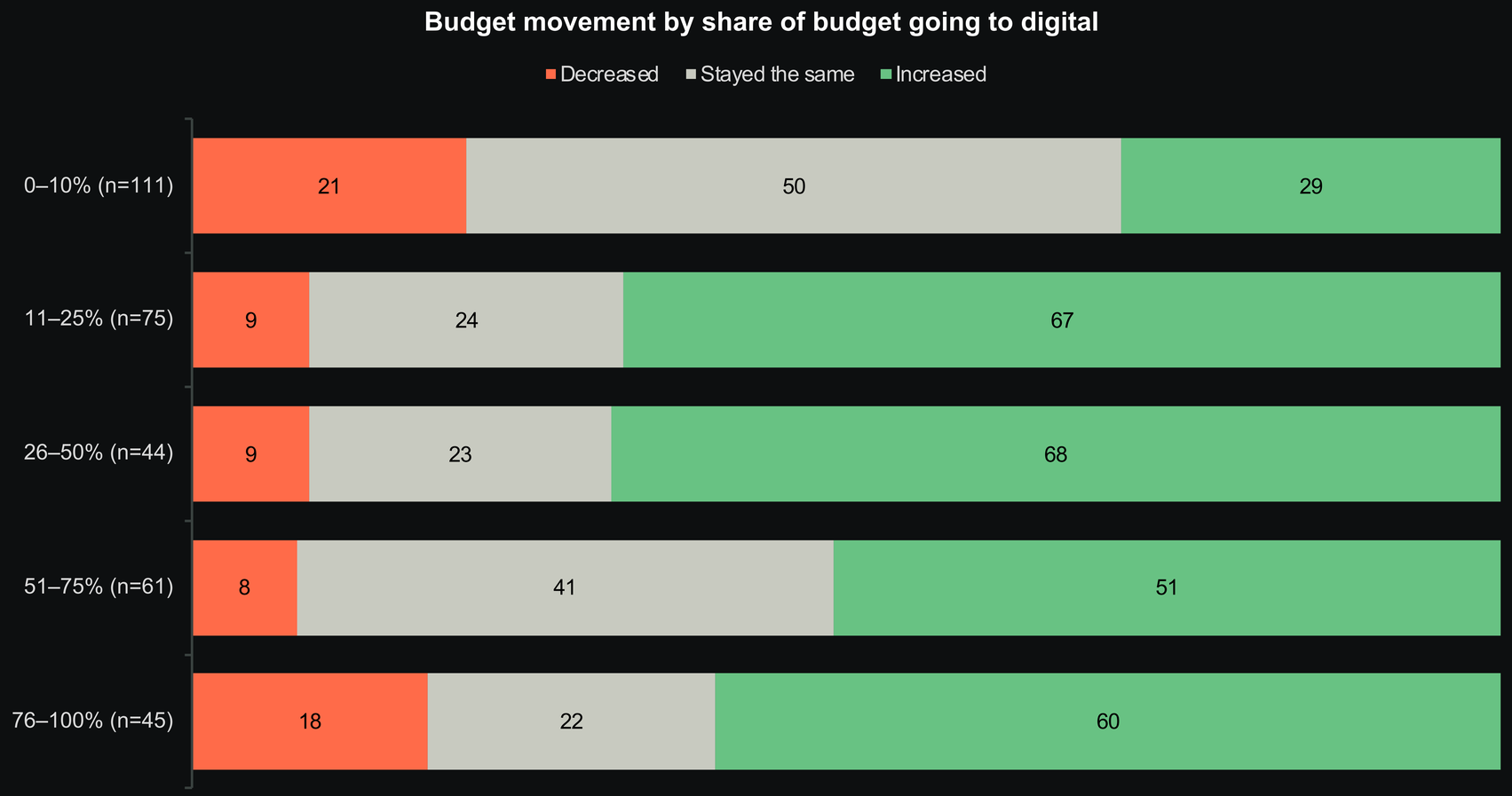




| Digital share of budget | n | Channels | MarTech working | AI live | Foundations | Grew budget |
|---|---|---|---|---|---|---|
| 0-10% | 111 | 3.6 | 2.2 | 1.5 | 30 | 29% |
| 11-25% | 75 | 4.2 | 5.1 | 3.1 | 51 | 67% |
| 26-50% | 44 | 4.5 | 6.9 | 3.5 | 61 | 68% |
| 51-75% | 61 | 4.8 | 7.5 | 4.5 | 66 | 51% |
| 76-100% | 45 | 3.8 | 7.0 | 4.0 | 63 | 60% |

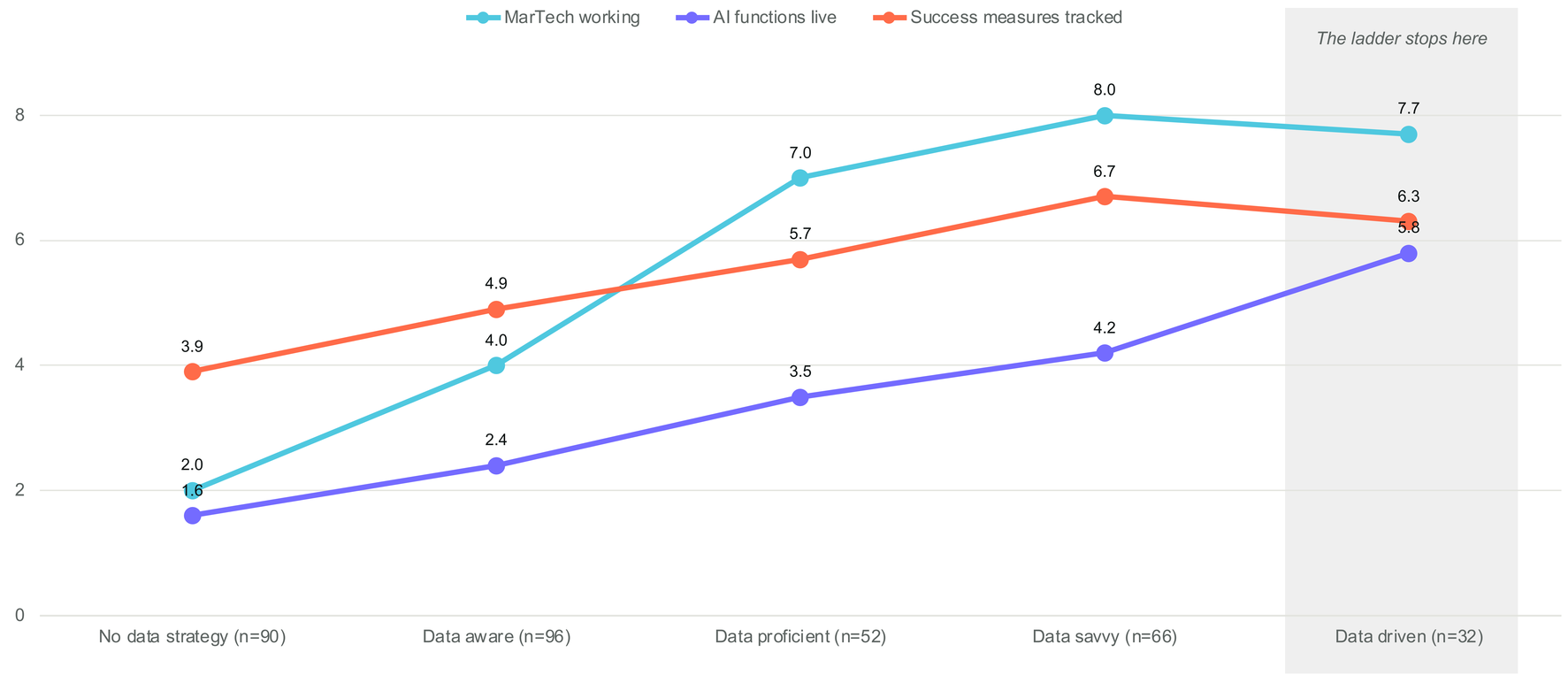
# The first divide: how much you commit to digital

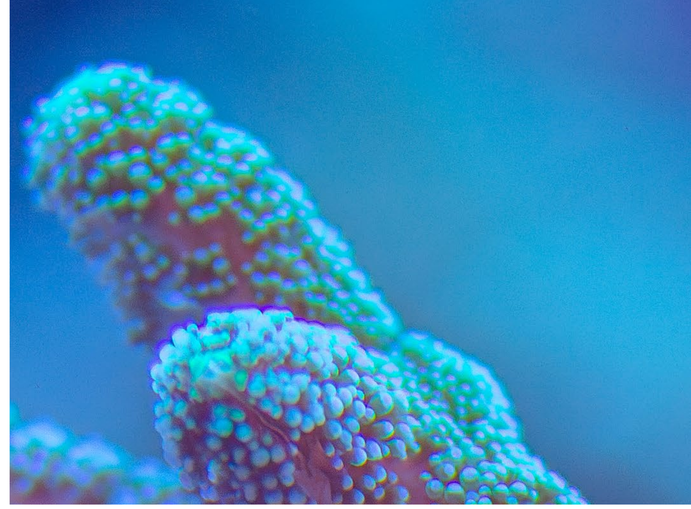
# Budget movement, in full

The bottom band is not just the least likely to grow (29%); half of it held flat and 21% cut, the highest of any band. The top band cuts almost as often (18%).

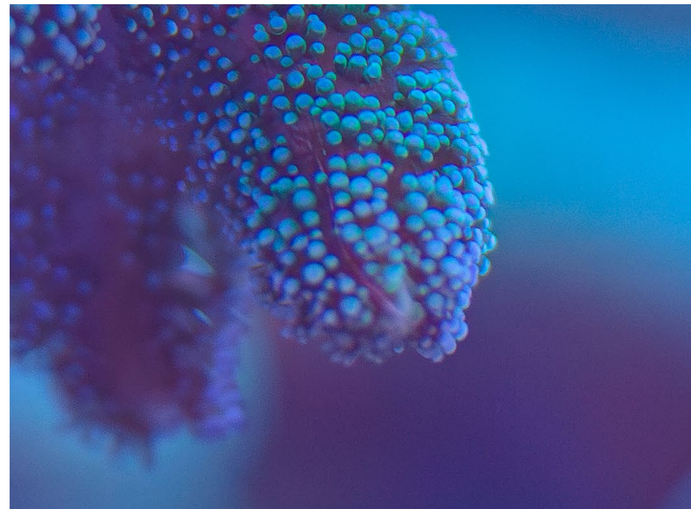


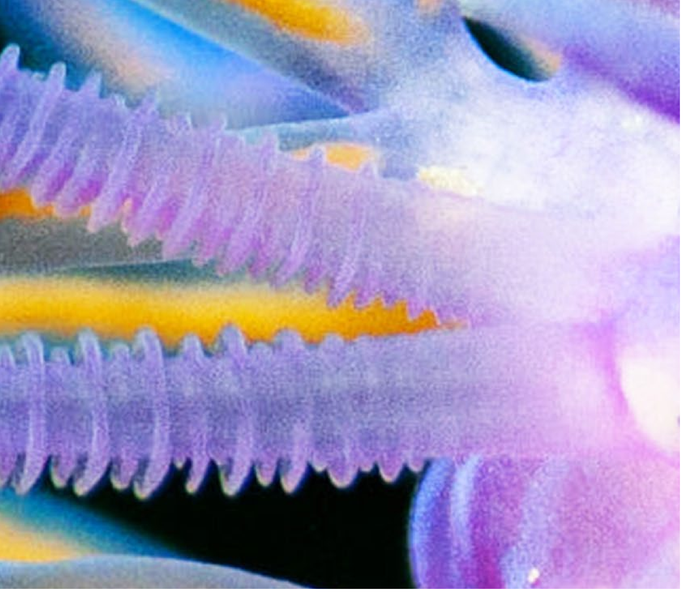
Working technology climbs from 2.0 to 8.0 across the first four rungs. Then the top rung stops behaving: no more working technology, and no more measures, than the data savvy.



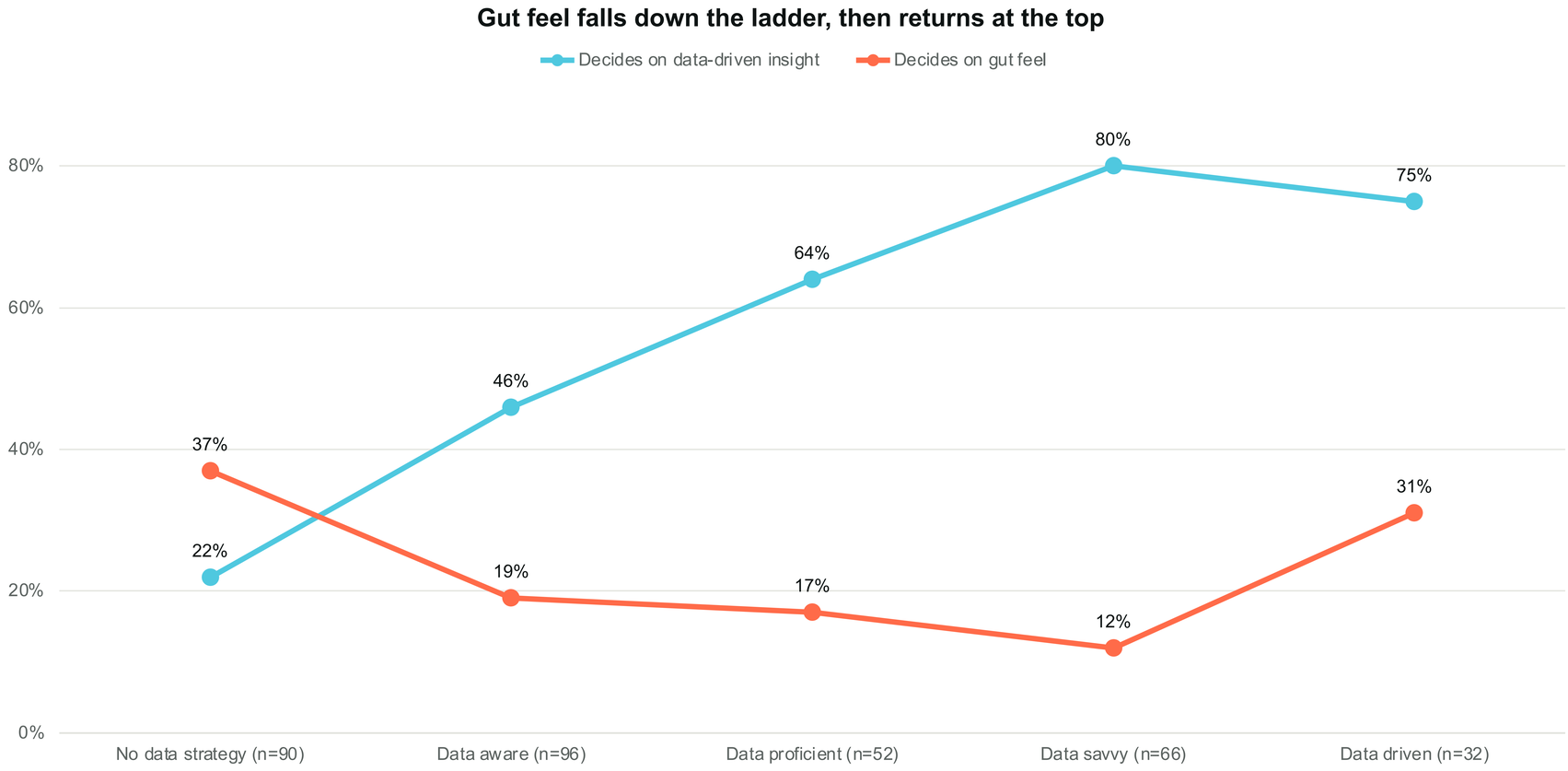
# The second divide: data maturity, and where the ladder breaks

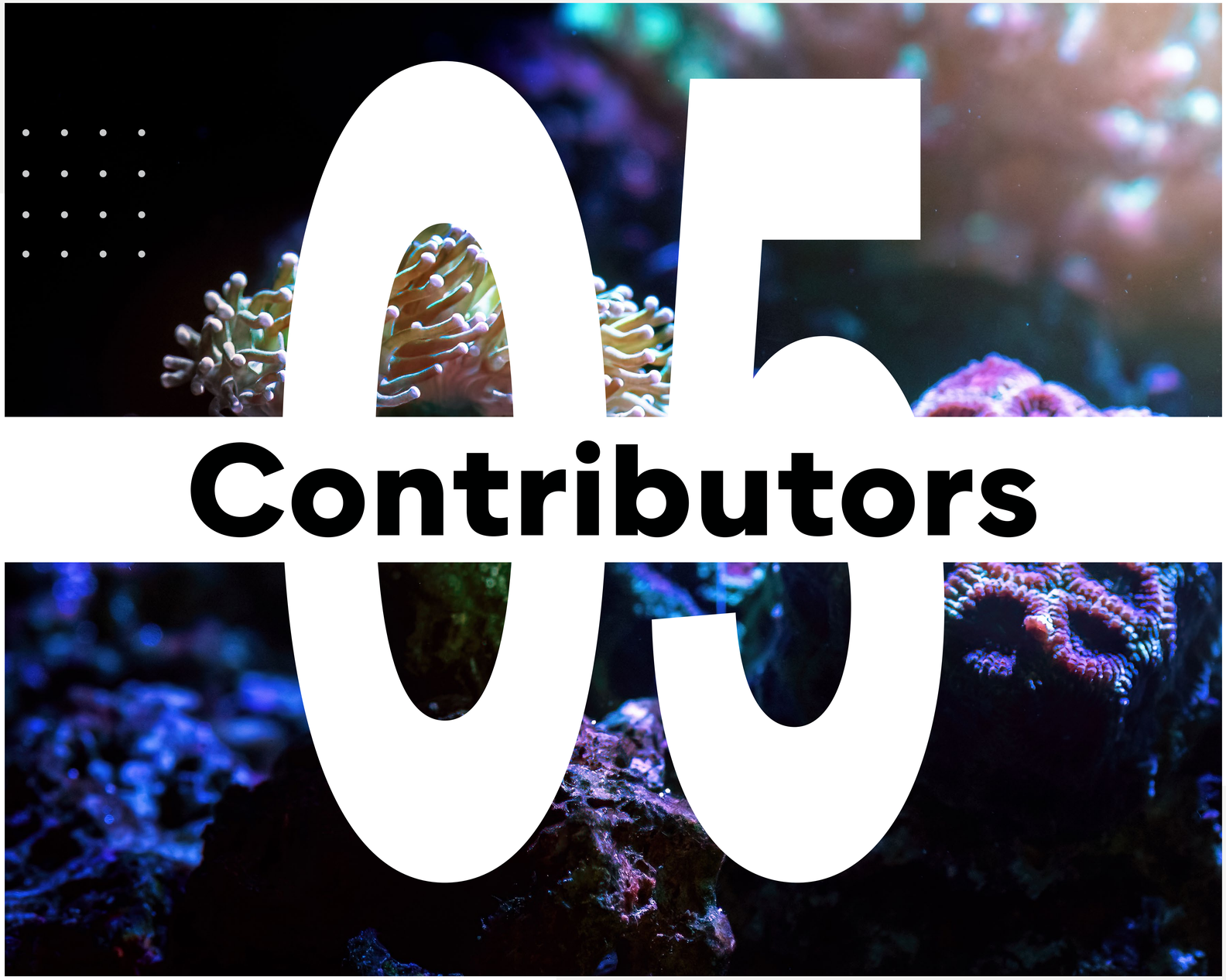




# The tell: gut feel returns at the top rung

Reliance on gut feel falls from 37% with no data strategy to 12% among the data savvy, then jumps back to 31% at the top rung. With 32 organisations there, this is directional.





# 05 Contributors

## The market, in person

**Mike Saunders**

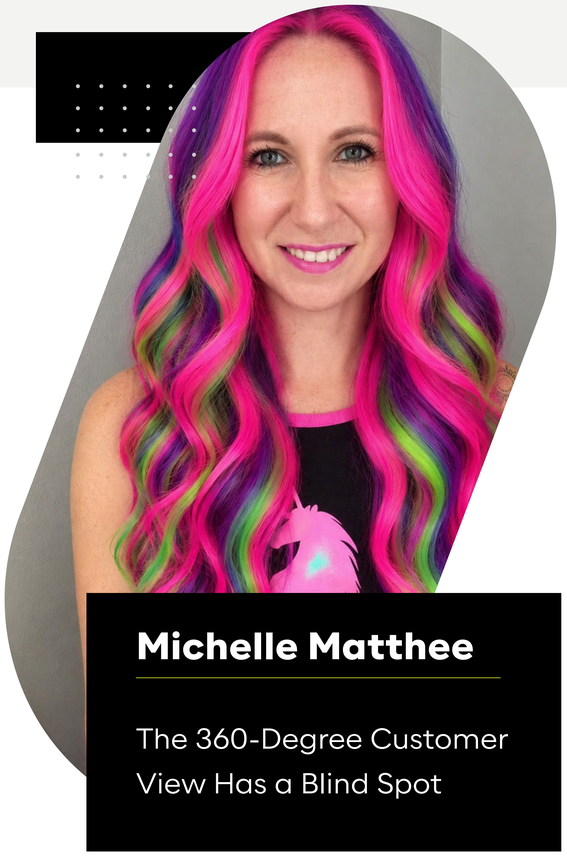
What Your Business
Will Be Able to Build in 2027

**Bronwyn Williams**

Moloch Games

**Jean-Pierre Murray-Kline**

The Last Place I Thought to Look



**Michelle Matthee**

The 360-Degree Customer View Has a Blind Spot

**TJ Moezelaar**

Beyond the Prompt Race: Why Data-Driven Task Engines Need Human Guardians

**Daniel Brocklebank**

Five Agencies, No Editor

**Stephen Emmett**

Augment First, Automate Second: AI and Quality in the Contact Centre

**Amanda Reekie**

Customer experience is where the revenue is

**Beverley Houston**

The new media landscape: Where journalists look for stories, AI now looks for answers

**Kinsta**

AI is changing the web, but the new landscape doesn't make your website less important

**Intuit Mailchimp**

Send Less, Earn More: Key Findings From Intuit Mailchimp's 2025 Holiday Season

**Semrush & Digitlab**

Long-form isn't dead. It has a new first reader

**CookieYes**

What launching inside ChatGPT and Claude taught us about discovery

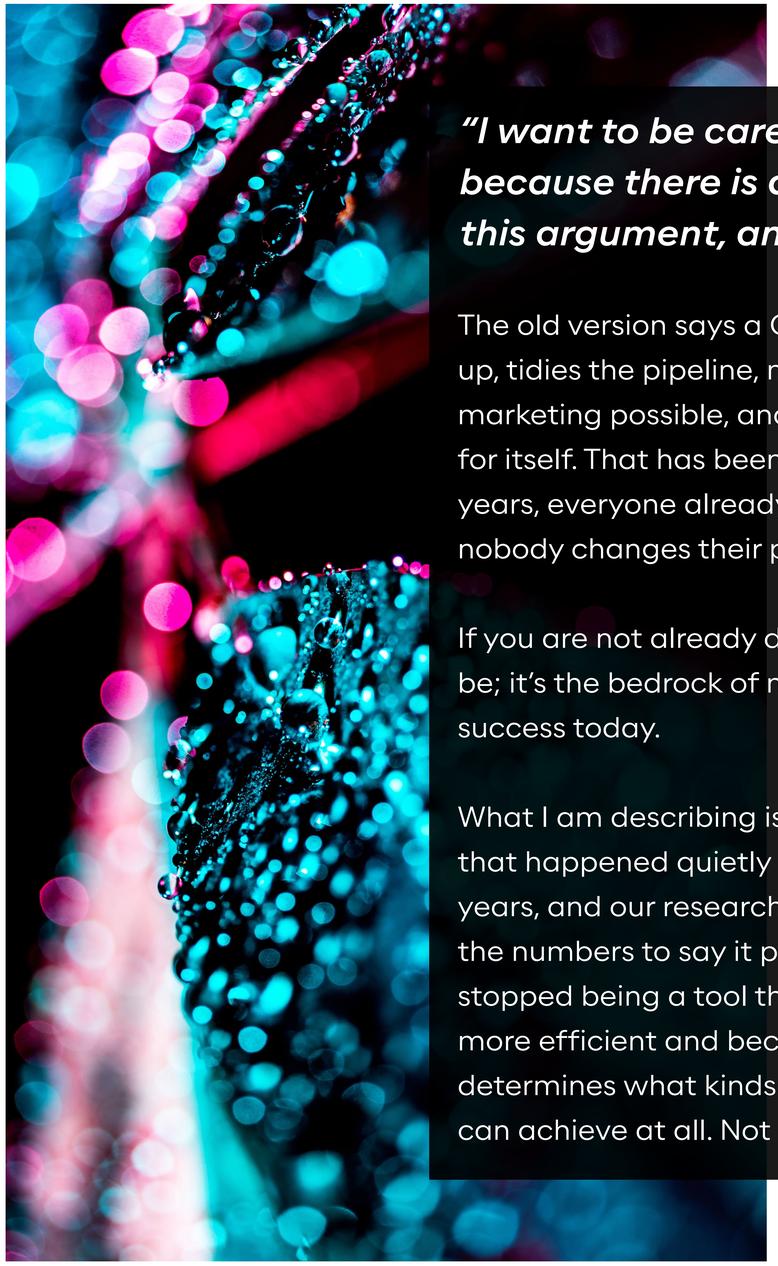
# Mike Saunders

CEO at Digitlab

## What Your Business Will Be Able to Build in 2027

**Insight 2027**

Your CRM used to decide how well you grew. Now it determines what you can build.



*"I want to be careful here, because there is an old version of this argument, and it is boring."*

The old version says a CRM improves follow-up, tidies the pipeline, makes lifecycle marketing possible, and therefore pays for itself. That has been true for twenty years, everyone already agrees with it, and nobody changes their plans because of it.

If you are not already doing this, you should be; it's the bedrock of marketing and sales success today.

What I am describing is a different thing that happened quietly in the last two years, and our research this year gave me the numbers to say it plainly. The CRM stopped being a tool that made growth more efficient and became the thing that determines what kinds of growth a business can achieve at all. Not how fast. Whether.

# AI did not democratise growth. It put a door on it.

The consensus position is that AI levels the field, because a two-person business and a two-thousand-person business can buy the same model. Our data says the opposite, and the mechanism is specific enough to plan around.

Experimentation with AI is universal. Every kind of business is trying things, at roughly the same rate, regardless of how well equipped it is. Deployment is a completely different story, and it divides along one line.

Sort the AI functions by how close they sit to revenue, and the split is obvious. The functions that need nothing but a subscription- writing, design, general assistance- are running everywhere. The functions that touch revenue- personalisation, lead scoring, sales enablement, customer insight- are running roughly four times as often in businesses with a working CRM as in businesses without one. Seven in ten businesses with no CRM have none of them in production. And the gap on the subscription tier is about half as wide, which tells you it is not about budget, sophistication, or appetite. It is about whether there is any customer data for the thing to point at.

So the tooling has quietly separated into two tiers. One tier anyone can buy produces assets faster and cheaper, and your competitors bought it the same week you did. And there is a tier that only works if the business already knows who its customers are, what they cost and what they are worth. The first tier lowers your cost per asset. The second is where revenue moves. The CRM is the border between them.

That is the shift. Nobody is locked out of AI. Plenty of businesses are locked out of the half of it that pays.

# Your customer data stopped being an asset. It became a licence.

An asset sits on a balance sheet and appreciates quietly whether you use it or not. A licence is different. A licence is what you must hold to operate, and it comes with conditions.

The condition on customer data is not technical. This is the part most businesses get wrong, and it costs them years.

A CRM only works when a business has agreed what a customer is, when an enquiry becomes one, who is accountable at each stage, and what counts as success. That agreement is between marketing and sales, and in my experience most organisations have never made it. They both have versions, the versions disagree, and nobody has ever had to reconcile them because no single system has ever forced the question.

Buy the software without agreeing, and you have bought a filing cabinet and two conflicting reports. The evidence for that is the sharpest thing in our study this year. Businesses running a CRM properly grew their marketing budgets more often than businesses without one. But businesses that owned a CRM that wasn't working grew less often than businesses that had never bought one at all, and they were the group most likely to cut their marketing spend. Half of them have no revenue-facing AI in production. Owning the tool and not running it is not neutral. It is a worse position than not owning it, because it comes with the cost, the false confidence, and the conclusion at the end that the software was the problem.

This is now the market's dominant failure mode, and it is not a buying failure. Across every category of marketing technology, roughly two in five tools that businesses own are described by their own owners as idle or ineffective. Of the businesses that do own a CRM, fewer than one in five uses it to see where a customer sits in their own lifecycle. The market has finished buying. It has not started agreeing.

# Waiting has stopped being free.

Every previous version of this decision could be deferred. You could run on spreadsheets and instinct for five years, buy a CRM in year six, import what you had and be roughly where you would have been. The cost of delay was flat.

That is no longer the case, and this is the part I would put in front of a board.

Capability built on customer data compounds on the history you have collected. Personalisation, scoring, forecasting, retention modelling: none of it works on a dataset that starts today. So a business beginning its data layer in 2028 is not twelve months behind its competitor. It is twelve months of customers behind, and that distance keeps opening while both of them stand still. The gap is no longer a gap. It is an interest rate.

And the market is not paying it down. When we looked at what businesses intend to invest in over the next two years, intent followed existing capability rather than compensating for its absence. Businesses with no CRM were more than twice as likely as

businesses running one to have no plan at all to build revenue operations, marketing operations or conversion capability within two years. The training priorities across the market are led by social media and content strategy, in a market where almost everyone already runs social. We are collectively planning to get better at what we are already best at.

Meanwhile, the money is moving toward the businesses that can account for it. Marketing budgets in South Africa are not being cut, which surprised me given the mood of the past two years, but where they grew tracks data maturity far more closely than size or sector. Businesses at the top of the maturity ladder grew their marketing budgets at more than double the rate of those with no data strategy. Nobody is being denied budget for having bad ideas. They are being held flat because they can't show what happened in the last round.

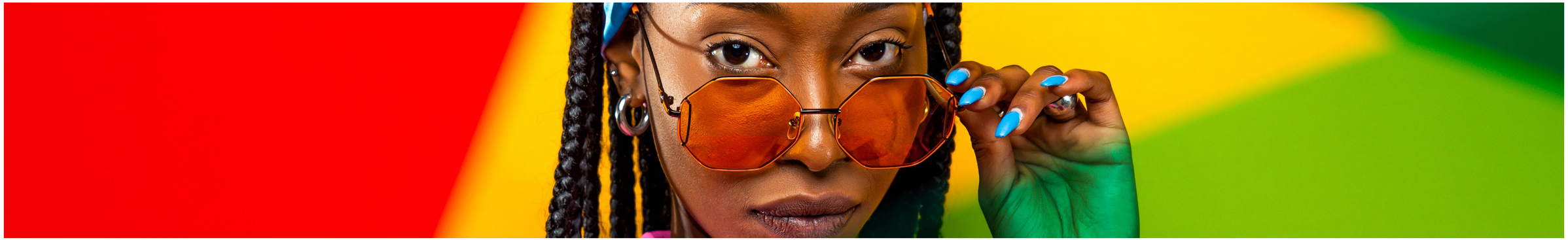
## The growth is in the base, and the base is in the instrument.

Here is why this is a growth argument and not an operations one.

South African marketing measures acquisition roughly twice as well as it measures anything that happens after a customer arrives. Retention, lifetime value, lifecycle progression, satisfaction: four in ten businesses track none of them. The technology category whose entire purpose is adding value to existing customers is the least installed and least functional part of the average stack.

Now set that beside the best-performing content asset in our whole study. Rated above everything a marketing team writes about itself: customer evidence. Case studies, testimonials, proof. Your existing customers doing your selling. Almost nobody manufactures it systematically, because doing so requires knowing which customers are happy, which is a CRM question.

So the cheapest growth available in 2027 is not in reach or in new channels. It is in customers a business has already paid to acquire, in expansion, retention and advocacy it currently cannot see. That growth does not need a bigger budget. It needs an instrument. And it happens to live in the same place that wins the budget argument, which is the closest thing to a free lunch in any of this.



**Mike Saunders**
CEO of Digitlab

## What I would do with the year.

I would not buy anything.
I would take the instrument the business already owns and most needs to trust, which for nearly everyone is the CRM, and I would get marketing and sales into a room to agree on what a customer is before anyone touches a setting. That conversation is uncomfortable, takes a fortnight, and is the actual work. Then I would instrument what happens after the sale, because that is where the revenue nobody is counting sits. Then, last, I would point AI at it, and it would work, because by then there would be something for it to read.

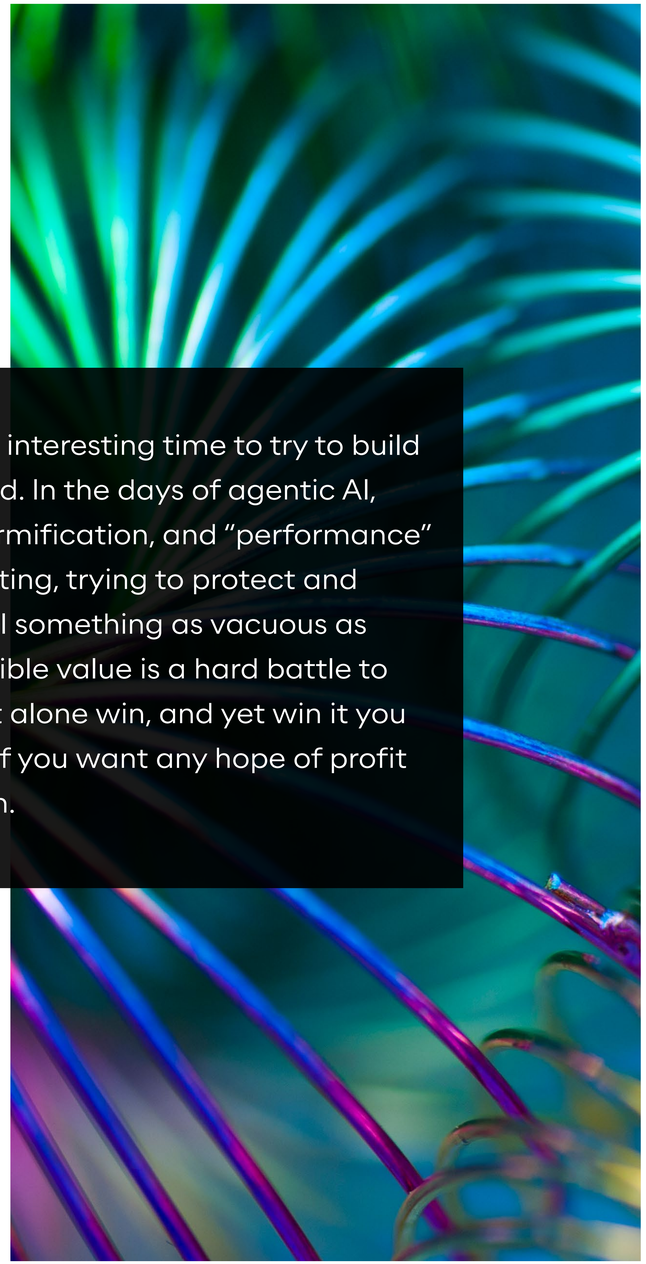
The businesses that pull away next year will not be the ones with the best ideas or the biggest budgets. They will be the ones that spent 2027 building, while their competitors spent it comparing tools.

# Bronwyn Williams

Futurist | Trend Analyst | Economist | Consultant | Global Keynote Speaker at Flux Trends

## Moloch Games

Moloch game: A negative-sum, multipolar trap situation, where rational actors, each acting in their own self-interest, choose a short-term competitive strategy that collectively ruins the outcome for everyone.



It is an interesting time to try to build a brand. In the days of agentic AI, platformification, and "performance" marketing, trying to protect and control something as vacuous as intangible value is a hard battle to sell, let alone win, and yet win it you must, if you want any hope of profit margin.

Agentic commerce promises decision-fatigued customers the tantalising promise of a friction-free shopping experience. You don't even have to think about what you want for dinner, let alone do the mental arithmetic of what you need to buy to make that meal, or which brands will allow you to maximise the quality and minimise cost of each plate to fit your budget and preferences. Pixie (the Sixty60 shopping bot) or Penny ("her" Pick n Pay rival) can simply debate and decide for you. All you have to do is hand over your credit card and wait for the doorbell to ring. What is more, as trend doyenne Faith Popcorn points out, you can set your agentic friends to simply ignore any brand or item that does not fit your protein goals, calorie budget, climate and diversity, equity, and inclusion sensibilities. Don't offer enough protein per portion to help you hit your daily target? Don't have a 50% female board? Is it 1% more expensive than your nearest substitute? Your brand simply does not show up for consideration. Your pretty packaging and fancy focus-group perfected promotional banners don't even enter the chat. Your customer is not tempted by a snack aisle they never stand in. Your shopper is never persuaded by the clever copy designed to override their calorie concerns with a smart argument if they never encounter the box. The end result is not unlike being an honest 5 foot 4 "short king" trying to find a date on Tinder. His profile never shows up to a woman whose preference settings have disqualified him from the get-go. The question for brands then becomes, who is filtering you out before they have even seen you?

The price filter alone deserves a closer look. If shoppers are asking their agents to filter for best price, bots are not so easily moved by emotive branding elements designed to persuade fickle flesh and blood humans to give you a chance. No, unless your customer asks for you by name, an agentic assistant will choose the cheaper house (un)brand over your carefully created brand every time. In a perfectly "fair" market based on price and quality, the commodity wins over the brand every time. Such perfectly fair markets, of course, are also, as economists will tell you, zero profit markets. The very notion of which brands were meant to override.

Which brings us back to the crux: the only way out of the downward spiral of the perfectly sanitised agentic shopping list is to get your customers to consciously override their own agentic assistants that have been specifically programmed to look out for their own best interests and alleviate that horrendous modern burden of thoughtful choice! And the only way to do that is to invest in building an actual brand. And that means being patient enough to spend real money

on the long-term uncertain project of real, deep, brand building - at a time when margins are razor thin, investors are impatient and pay-as-you-go “performance” marketing promises you immediate demonstrable return on investment that slow burn deep relationship and trust building just cannot compete with.

Which brands are brave enough to swim against that tide? What marketing and brand managers have the mandate (let alone the budget) to spend on seeding a field with the hope of a future harvest seasons later?

All the incentives point to most brands falling into the neat Moloch game trap laid by the tech companies and platforms they have come to depend on. The trap that gets brands and businesses addicted to the dopamine hit of views and reach and “certainty”. To placate CFOs and shareholders that every one of their rands and cents has a provable return, but makes them ever more dependent on the platforms, and their demands for more and more share of the profits in the process (all the while starving brands of the investment needed to build a brand that can survive without the machine in the process).

Playing by the rules of the agentic economy means sacrificing the essential value of a real relationship that is intrinsic brand value for short-term competitive metrics because everyone else is, and if you don’t play along, your funding will disappear.

The question then becomes, is your brand brave enough to break the rules big tech platforms and big money shareholders are trying to enforce, and defend the fragile idea of a brand in the face of all this? Or are you happy with diminishing returns? The good news is, those few who are prepared to defend the abstract, the illegible, the indefensible, the idea of intangible value will be the last ones standing once software has finished eating the profits of the legible digital supply chain.

**Bronwyn Williams**
Futurist | Trend Analyst | Economist | Consultant | Global Keynote Speaker at Flux Trends

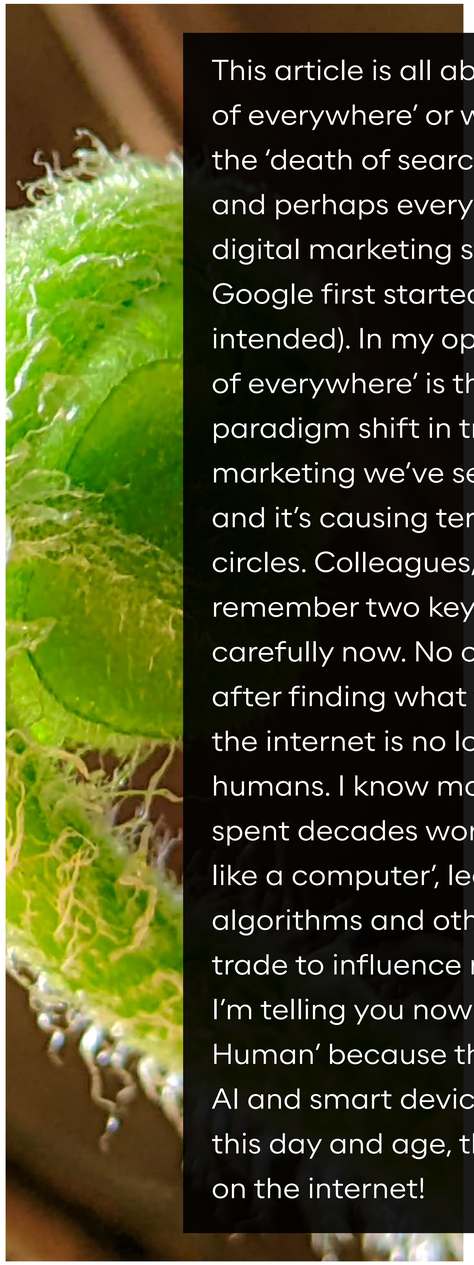
# Jean-Pierre Murray-Kline

Future Thinker | Business and Environmental Technologist | Published Author

## The Last Place I Thought to Look

‘The search of everywhere’

I searched everywhere! This concept has been around a lot longer than you think, and it has affected us all. Ever lost a car key or a sock? Trust me, you’ve already mastered ‘search everywhere’ and know the panic all too well!



This article is all about ‘the search of everywhere’ or what I also call the ‘death of search optimisation’ and perhaps every old-school digital marketing strategy since Google first started to crawl (pun intended). In my opinion, ‘the search of everywhere’ is the most significant paradigm shift in traditional digital marketing we’ve seen this decade, and it’s causing terror in professional circles. Colleagues, we need to remember two key points. Listen carefully now. No one keeps looking after finding what they need, and the internet is no longer just for humans. I know many of you have spent decades working hard to ‘think like a computer’, learning all about algorithms and other tricks of the trade to influence results. Well, stop. I’m telling you now to ‘think like a Human’ because that’s exactly how AI and smart devices ‘think’, and in this day and age, they outnumber us on the internet!

## The results of this paradigm shift.

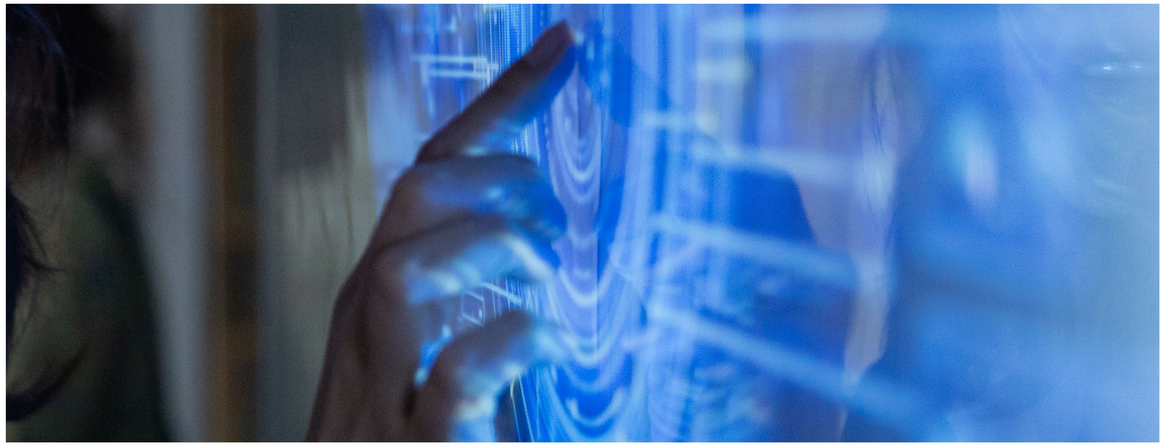
They are freaking out marketing teams who are watching their website traffic drop like nobody’s business. Just as they get a little reprieve and see their unique IP visitor stats bounce back on the raw server logs, the horror returns like Anna Faris in a bad sequel, traffic resumes but this time it’s thousands of AI search bots revisiting the site to harvest information for their own agendas. Don’t fool yourself, a massive portion of modern search and product discovery happens in untraceable, private digital spaces.

## What to do?

How you present your products and services, and where you present them, all need to be reimagined. You should no longer work so hard in the hope that your website is going to dominate the first page of natural search results on Google. Even if they did, the newer generations aren’t really using ‘search’ in the same way we used to back in the good old days when we still had Cadbury Tempo and Simba Kreols Chips. The ‘new generation’ are busy chinwagging with ChatGPT, Claude, Perplexity, or Gemini, hanging around in community forums, or using underdog channels and product marketplaces. In other words, and in a way my own generation (Xennials) can understand, ‘search’ has lost its proverbial sock and is walking around every imaginable room in an infinite digital house, while wearing a confused face, asking itself “what did I come here for again?”.

## Going Forward.

If you want to maintain momentum as a digital guru, you cannot let pride stand in your way. There's an urban legend about US President JFK visiting the NASA Space Center and noticing a cleaner carrying a broom down a hallway. JFK asked the man what he was doing, and the cleaner replied, "Mr. President, I'm helping put a man on the moon." What I am trying to say here is please drop the ego, pick up the broom, clean your own floors again while you relearn, or risk losing the entire office. Personally, I'm adopting a strategy of hiring as many young people as possible and as it turns out, we have a great deal to learn from them. We should listen, after all, they will be spending their future monies (whatever they might turn out to be) in a space where Zero-Click search results is a normal thing, and they may very well give us some idea on how to actually make a sale without getting a visitor to a webpage at all. To start, learn as much as you can about GEO (Generative Engine Optimization), AEO (Answer Engine Optimization), AIO (AI Overviews), and LLMO (Large Language Model Optimisation).



## It's a lot for a human to process.

Understanding Industry 5.0, the Internet of Everything, how AI searches and ranks results, and how to attract platforms and their little search bots, all the while putting ourselves in the minds of Gen Z, Gen Alpha, and Gen Beta, is no small order. I'm happy to report that many of my industry peers are already championing this transition and 'identifying' themselves as AI+ friendly!

The spanner in the works for us all is imagining where 'search' will actually take place and mastering those digital platforms faster than our competitors. A few years ago, I started with a Google Home device. Just a few months later, there were watches and glasses. Now we have smart dog bowls, e-salt shakers, and shirt e-pins all chatting with devices all over the internet, sharing who knows what information. Very soon, I believe, we'll have smart car windshields and e-contact lenses, and eventually, though I don't know how I feel about this yet, we'll be integrated into the search environment through the merging of organic and hardware. It's e-inevitable.

One of the ways I try to predict the future of 'search' is by imagining any surface that can display an ad. If placing a screen or an audio speaker is affordable enough, then that space may very well become part of the ad search ecosystem. From a marketing perspective, it's actually really exciting!

# Critical Action.

Forget about keywords, and work on dominating semantic context and trusted citations. For the next 12 months, be prepared to try as many new digital solutions as possible, take a page out of George Clooney's or Leonardo DiCaprio's book and play the field. Just to be clear, I am not suggesting you be an eternal bachelor and non-committal to anything, but do maintain a healthy curiosity about all future tech.

The pace and scaling of 'search everywhere' will depend on social buy-in, affordability, and legislation. We're battling in a new, self-created realm: the skirmish underway with e-ethics and digital marketing solutions that impede on human rights. The tech industry has always been one to do first and ask permission later, isn't that right, Anthropic? Local legislation regarding privacy, data, and digital marketing must be observed.

## Ending with irony.

AI companies are running out of high-quality human data to train on, meaning human data is now a rare commodity, as will be human users of the internet in the coming years... to find ourselves, we are going to have to search a lot harder.

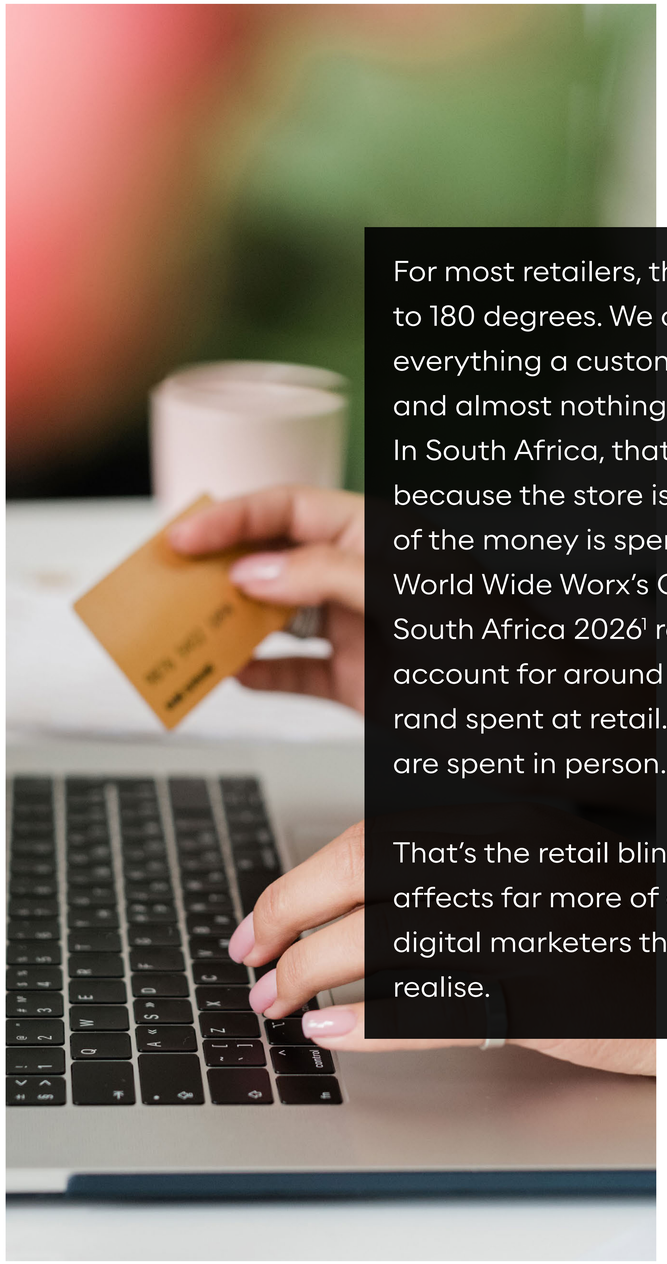
**Jean-Pierre Murray-Kline**
Future Thinker | Business and Environmental Technologist | Published Author

## Michelle Matthee

Head of Customer Success at Chat Inc

# The 360-Degree Customer View Has a Blind Spot

Every retail marketer has heard the promise of a true 360-degree view of the customer. Connect your ecommerce platform, CRM, analytics, and ad accounts, and you'll finally see the whole person.



For most retailers, that view is closer to 180 degrees. We can see almost everything a customer does online, and almost nothing they do in store. In South Africa, that's a big problem, because the store is still where most of the money is spent. According to World Wide Worx's Online Retail in South Africa 2026[1] report, online sales account for around one in every ten rand spent at retail. The other nine are spent in person.

That's the retail blind spot, and it affects far more of our decisions as digital marketers than most of us realise.

# Why the dots don't connect

Think about how people actually shop. Marketers call it ROPO: research online, purchase offline. Someone finds a product on Instagram, compares prices on their phone, and then goes into a physical store and buys it at the till. Showrooming works the other way round, where they try it in store and buy it online later. Either way, the 360 view breaks as soon as the customer switches channel.

In South Africa, that switch happens all the time. 79.1% of adults are now online, but only 34.2% of them shop online.[2] So most South Africans can be reached and influenced digitally, but most of them still buy in person.

Our tools weren't built for this. Cookies, logins, email addresses, and pixels all assume the customer is on a screen. Once they walk into a store, we lose them. Along with all the data we could have captured.

The till doesn't help either. POS systems are built for speed, stock control and accounting, not for knowing who's standing at the counter. A store can tell you exactly what sold, when and for how much, and still have no idea who bought it.

Fixing that isn't simple. Retail POS systems are often older and heavily customised, and they run across hundreds of stores. Integrating them with marketing platforms means IT teams, vendors, testing, and disruption on the shop floor. So, it ends up at the bottom of the priority list, even when everyone agrees it matters.

This is where a lot of omnichannel advice falls short. Retailers are told to invest in analytics to map the customer journey, but analytics can only measure what it can see. If the last step happens at a till that isn't connected, the dashboard shows a journey that never ended in a sale.

The way most retailers are structured adds to it. Ecommerce, stores, marketing and loyalty usually sit in different teams, with different systems and different targets. Nobody owns the full customer, so nobody is measured on actually seeing them.

## The cost of a half picture

The real issue is that we treat this half view as if it's the full picture.

Marketing gets judged on the sales it can see, which means online sales. Campaigns that drive people into stores look like they're underperforming, so budget moves away from work that might be bringing in the most revenue.

Ad platforms learn from the same incomplete data. They optimise towards the purchases they're shown, so they get very good at finding online buyers and miss the people who buy in store.

That's also where a lot of Conversion Optimisation goes wrong. We spend plenty of time and money refining checkout flows and landing pages, and that work is valuable. But we're putting our best optimisation effort into the part of the business that's easiest to measure, not the part that's biggest.

## Why more data isn't the whole answer

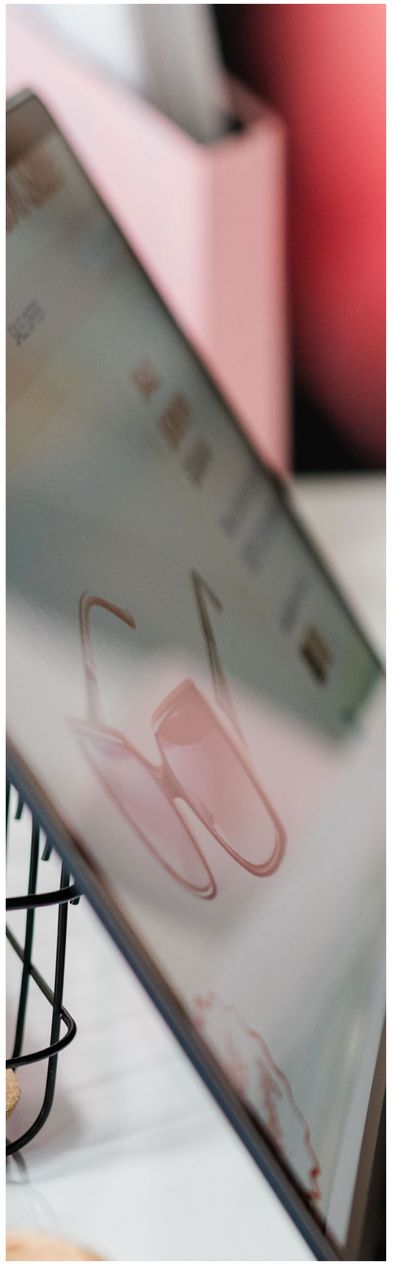
The obvious fix is to collect more customer data in-store, and plenty of retailers already try to do this through loyalty programmes.

But shoppers are tired of it. Most of us already have a wallet or phone full of loyalty cards and apps, all wanting a sign-up, a password, and our attention. That's loyalty fatigue. People skip the scan, forget the card, or just don't join, so the data that does come through is patchy.

Then there's trust. Most of us aren't comfortable reading out our ID number, email address, or cell number for a cashier to type into a POS, usually with a queue listening in. It feels intrusive, it slows down checkout, and you never quite know where your details will end up.

Shoppers don't mind being known. They just want a fair exchange that's quick, clear, and on their terms, and under POPIA it has to be built on proper consent. If we ignore trust while trying to close the blind spot, we'll just end up with a new one.

It's also worth being clear about what we actually want our digital marketing systems to optimise for. More data pointed at the wrong goal doesn't help anyone.



# Early lessons from the shop floor

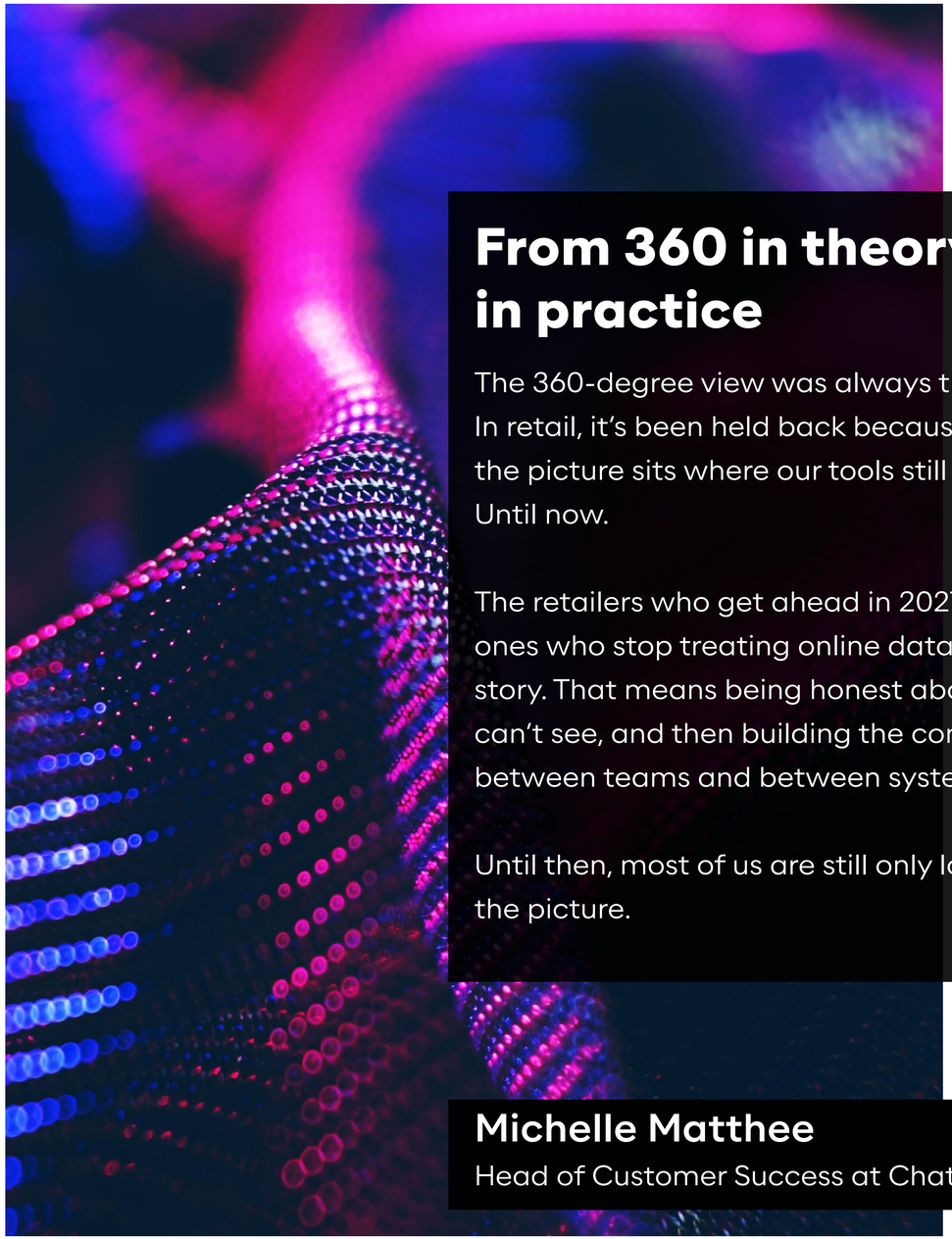
Diesel and Reebok at Canal Walk in Cape Town recently started connecting their in-store sales to their digital marketing data, and the early lessons have been really interesting.

Higher-ticket items are being browsed online and bought in store, just as the ROPO pattern suggests. These are the sales a 180-degree view misses, and they're often the most valuable ones.

Convenience makes a big difference. When shoppers get something useful at the till, like a digital receipt they won't lose, more of them are happy to be identified. That's something loyalty programmes have struggled to do.

There's a real saving on ad spend too. Once in-store purchases are visible, the brands no longer pay to show the same ad to someone who's already bought. Instead, retargeting can focus on products that complement what they bought.

For me, the biggest one is attribution. With online and offline data side by side, the brands can finally see which online ads are actually driving sales, including the ones that end at a till. Campaigns that looked weak on an online-only dashboard can now be judged on what they really contributed.



## From 360 in theory to 360 in practice

The 360-degree view was always the right goal. In retail, it's been held back because so much of the picture sits where our tools still couldn't reach. Until now.

The retailers who get ahead in 2027 will be the ones who stop treating online data as the whole story. That means being honest about what they can't see, and then building the connections between teams and between systems, to fix it.

Until then, most of us are still only looking at half the picture.

**Michelle Matthee**
Head of Customer Success at Chat Inc

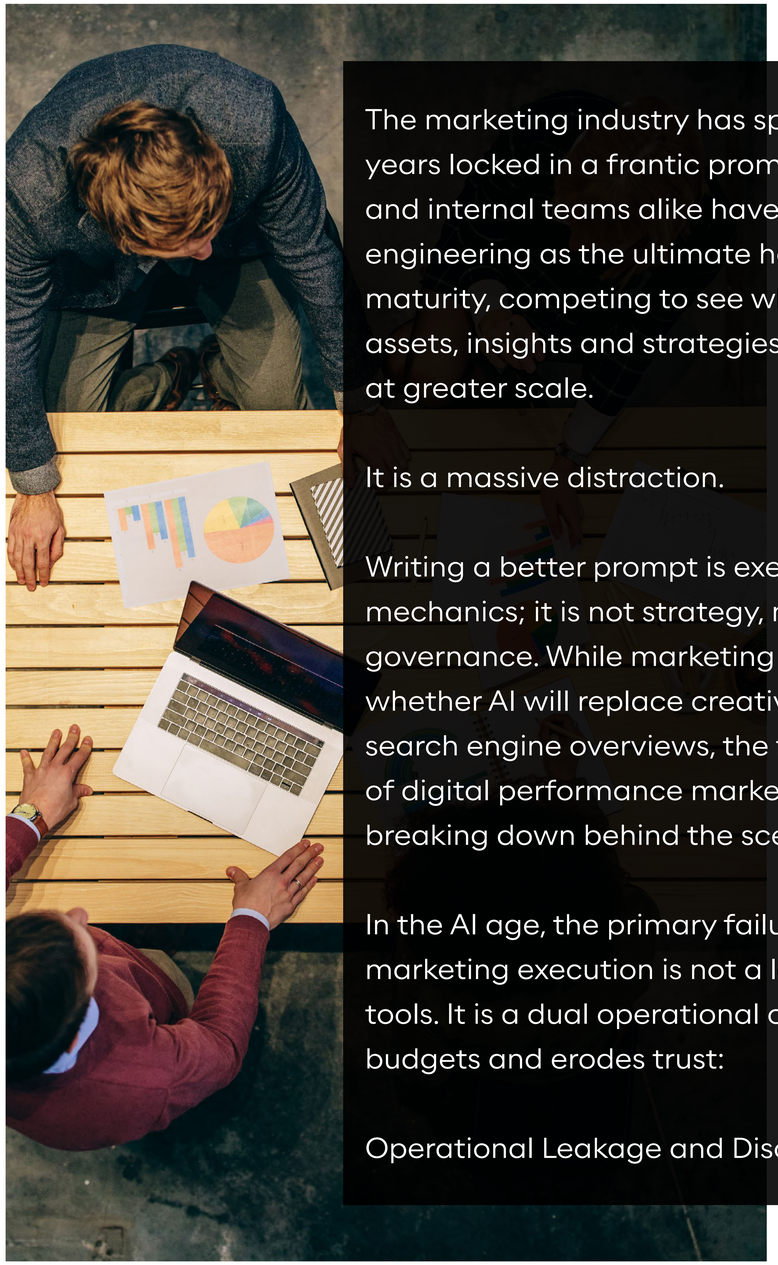
Sources:
[1] https://www.worldwideworx.com/onlineretailsa2026/
[2] https://www.peachpayments.com/2026-online-retail-report/

# TJ Moezelaar

CEO of Pitch

## Beyond the Prompt Race

Why Data-Driven Task Engines Need Human Guardians



The marketing industry has spent the last two years locked in a frantic prompt race. Agencies and internal teams alike have treated prompt engineering as the ultimate horizon of digital maturity, competing to see who can produce assets, insights and strategies faster, cheaper, and at greater scale.

It is a massive distraction.

Writing a better prompt is execution-level mechanics; it is not strategy, nor is it operational governance. While marketing leaders debate whether AI will replace creative teams or optimise search engine overviews, the foundational engine of digital performance marketing is quietly breaking down behind the scenes.

In the AI age, the primary failure of digital marketing execution is not a lack of generative tools. It is a dual operational crisis that burns client budgets and erodes trust:

Operational Leakage and Disconnected Strategy.

# The Dual Crisis of Modern Performance Marketing

Traditional agency models were built for an era when channels evolved at a human pace and agencies were measured primarily by creative output. Today, as digital marketing has evolved into a data analytics-driven discipline, where multi-channel alignment (SEO, Paid Media, CRO etc) and strategic positioning outweigh pure content volume, the legacy agency model reveals two deep structural flaws:

**1. Operational Leakage**
Human teams spend up to 40% of their billable hours bogged down in manual overhead: juggling disconnected project management boards, assembling static monthly reporting decks, tracking down task statuses, and chasing scope updates. Deliverables slip, account leaders burn out, and clients pay premium retainer fees for administrative maintenance rather than commercial execution.

**2. Disconnected Strategy**
Agencies build sophisticated quarterly strategy decks, but daily execution operates completely out of sync with real-time performance data. Paid media algorithms make real-time bidding pivots at 2:00 AM on a Tuesday, yet the SEO team, performance media managers, and conversion strategists won't adjust their workflows until a human account manager manually reviews a reporting dashboard weeks later.

By treating SEO, Paid Search (PPC), Social Media, Conversion Rate Optimisation (CRO), and Creative as isolated line items on an invoice, agencies force clients to pay twice for overlapping intent, bidding heavily on keywords where organic search already dominates, or driving paid traffic to landing pages that lack conversion intent.

# Moving Beyond the Prompt Race: The Shift to Task Engines

To address these problems, performance marketing needs to look beyond generative text boxes and focus on operational architecture. One approach is a marketing operating system (MOS): a connected framework that links performance data, strategic priorities, delivery commitments and team capacity.

The distinction is what happens after an insight appears. A dashboard may show that performance has changed. A task engine translates that signal into a proposed action, assigns responsibility and tracks the response.

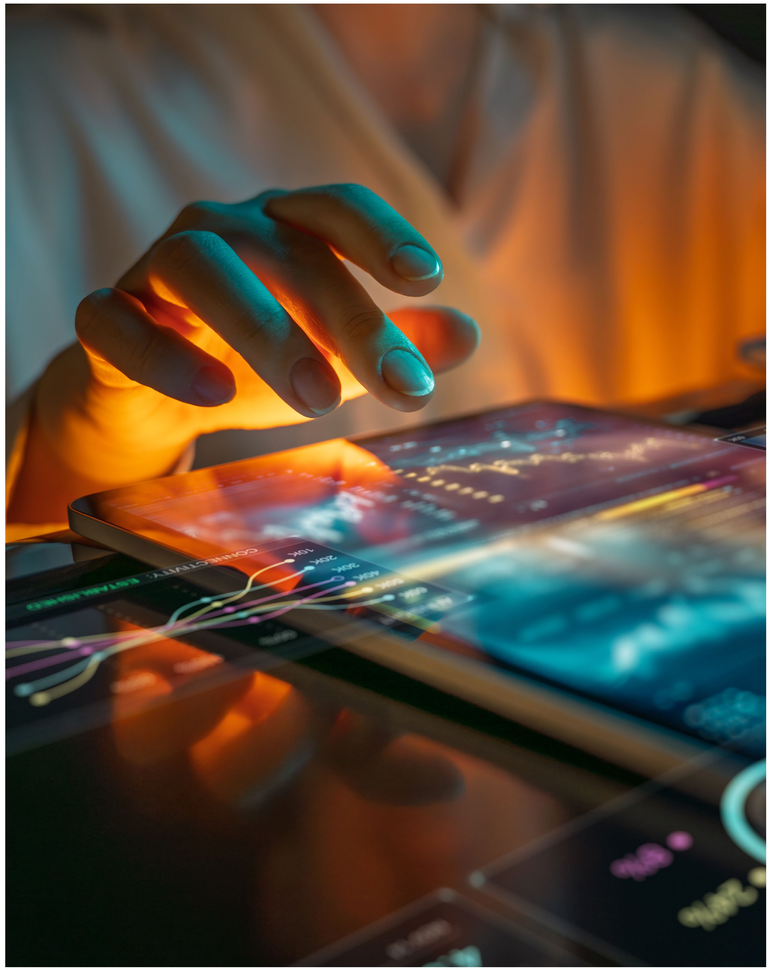
In many agencies, account leaders and strategists still act as the human bridge between channel specialists, reporting dashboards and task boards. They interpret the data, decide what needs attention and manually turn those decisions into work. This creates a bottleneck when the volume of information exceeds the team's capacity to respond.

Connecting reporting intelligence with operational workflows can shorten that gap. Agreed thresholds can trigger investigations, suggest tasks and route them to the appropriate specialists. For example:

- A sustained increase in paid search costs could trigger a joint SEO and paid media review to assess organic opportunities, commercial intent and bidding efficiency.
- A conversion drop on a high-traffic landing page could generate an investigation into tracking accuracy, traffic quality and the user experience before changes are made.
- Budget pacing outside agreed limits could trigger an alert and a review by the responsible media specialist.
- Performance against agreed KPIs could inform which tasks receive priority, with contractual commitments and available capacity shaping the delivery plan.

These triggers need context. A rise in keyword costs does not automatically justify creating more SEO content, and a conversion decline does not always mean a page needs redesigning. The system should help teams investigate the right problem, rather than turn every fluctuation into more work.

The opportunity is to reduce administrative friction and make the connection between evidence, decisions and delivery more visible. Its success depends on reliable data, clear rules and human ownership of the resulting actions.



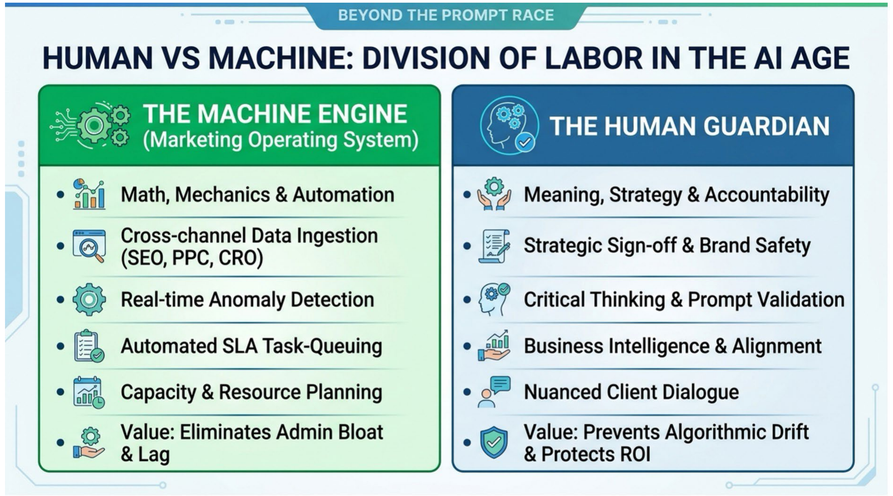
# The Human + MOS Synergy: Co-pilot, Not Captain

Automating the tactical task queue leads directly to the core challenge of the AI age: algorithmic drift.

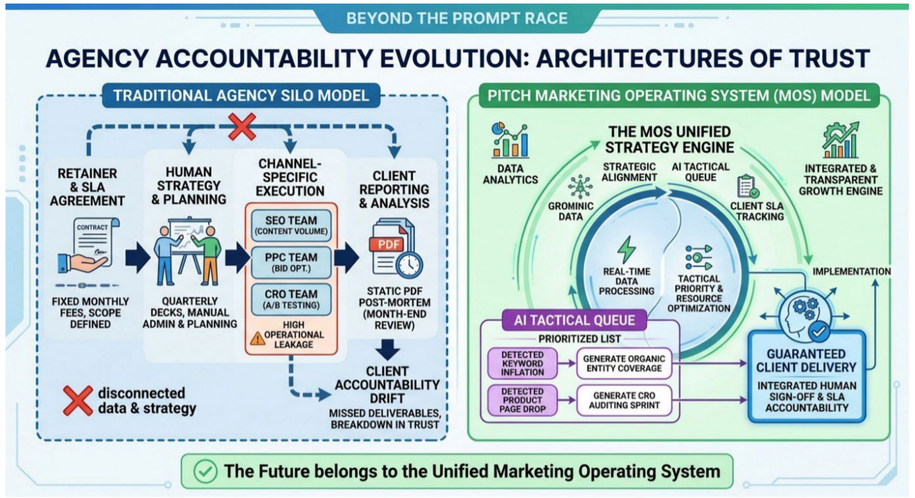
Unmonitored AI ad platforms and automated optimisation scripts frequently optimise for the wrong metrics. Left entirely to algorithms, campaigns chase vanity clicks, hallucinate brand context, and burn ad spend on low-quality traffic loops.

AI is an extraordinary copilot, but a terrible captain.

The true differentiator for modern performance marketing is not replacing agency talent with automation but establishing a clear division of labour between machine intelligence and human oversight.




By letting an MOS manage the mechanics, human talent is liberated from manual spreadsheet management. Marketers reclaim their primary purpose: applying critical thinking, brand empathy, and strategic guidance to the work before it goes live.



# The New Standard of Client Delivery

Winning in search and paid media in 2027 will not come down to who writes the cleverest AI prompt. It will belong to the brands and agencies that build the cleanest operational bridge between real-time data, automated resource planning, and human accountability.

When performance AI feeds the tactical work queue inside a structured operating system, and experienced human guardians sign off on every strategic move, digital marketing stops being a black-box retainer of missed SLAs. It becomes an accountable, transparent growth engine that consistently delivers on what clients pay for.

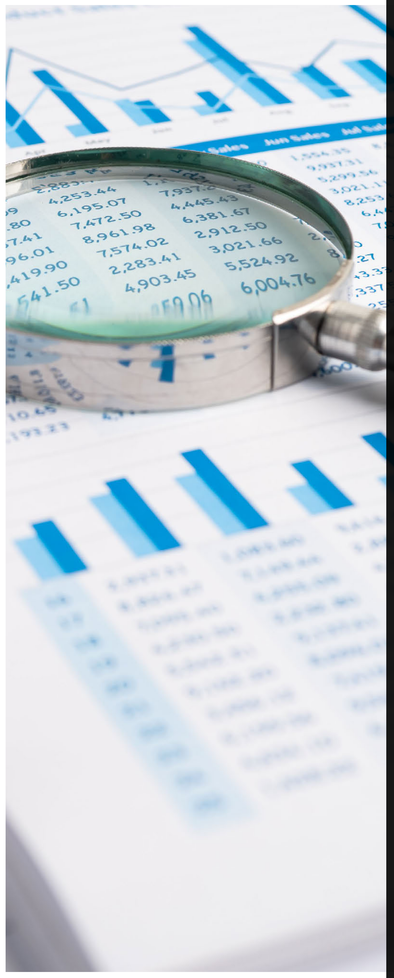
**TJ Moezelaar**
CEO of Pitch

# Daniel Brocklebank

Strategy Director at Second Rodeo

## Five Agencies, No Editor

Why organic social keeps getting overlooked in the marketing mix, and who should fix it.



# The Report Nobody Reads Twice

Every month, two reports land on a marketing team's desk.

The paid media report is all big numbers. Millions of impressions. A CPM that looks like a bargain. Everyone nods.

Then the organic social report. Engagement rate. Sentiment. What the community said in the comments this month.

Someone asks: "But what did it actually do?"

Silence.

Budget is only part of the problem. The bigger loss is everything else that gets skimmed over: the insights in the comments, the brand building that compounds month after month, the evidence of what people genuinely care about. Organic social gets taken less seriously than paid. Not because it delivers less, but because it delivers differently.

Last year in this report, I wrote about the trap of measuring organic social like performance marketing. This year I want to look at why the problem persists. My answer: most brands run their marketing with five agencies and no editor. Nobody is looking across the whole picture, so every decision defaults to whichever lens is loudest. Right now, that's paid media's.

## Everyone Defaults to What They Know

Our industry moves fast. Under pressure, people default to three things: what they know, what's easiest for them, and what they'll benefit from. That's human. It's also a terrible way to choose channels.

It isn't a hunch, either. Last year's State of Digital survey in this very report found that half of South African organisations still make decisions based on experience and intuition, rather than real-time analytics or customer data.

**The media lens**

Brand teams often take channel guidance from their media agency, assuming it comes with the brand's best interests at heart. I don't believe media agencies are evil. But their priorities are different. They're built to buy media, and they're measured on CPM, CPC and ROAS. Ask that lens which channels matter and it'll point you to whatever is cheapest to buy at scale.

The catch: cheap exposure isn't attention. A 2025 study by Lumen Research, Brand Metrics and Havas found that brand lift rises with how long people actually look at an ad, not whether it was merely seen.

CPM tells you what distribution cost. It doesn't tell you whether anyone was paying attention.

**The reach fallacy**
The assumption goes: smaller audience, smaller impact. This simply isn't true.

On paper, X is easy to cut. DataReportal's Digital 2025 report put its South African ad reach at just 6.2% of internet users. But a small, specific audience you can't reach anywhere else isn't a weakness. In a competitor review for an alcohol brand this year, we saw rivals pull back from X. Our client stayed, and it's seeing the results, particularly on engagement rate.

Pinterest tells the same story. People go there to plan. Pinterest's own data puts its South African audience at 3.8 million monthly users, running 734 million searches a year. Yet in a grocery category review this year, only one of the four South African retailers we tracked was still posting there. Meanwhile, a UK grocer that stopped publishing on Pinterest in 2024 was still drawing more than 10 million monthly views a year and a half later. That's what evergreen looks like.

The same goes for Spotify. Music is one of the most universal interests there is, yet most brands never consider it.

**The shiny-object reflex**
Then there's the opposite problem. An agency proposes TikTok or Reddit because it's new. An executive forwards a competitor's post: "Why aren't we doing this?" I'm all for experimenting. But this is reaction without critical thinking. Copy a competitor's channel mix and you inherit their thinking. Or their lack of it.

**Start with headspace**
Plan around the person, not the platform. Demographics tell you who someone is. Psychographics tell you what headspace they're in when they open the app, and whether your content belongs there

| Platform | Headspace | Signals worth tracking |
|---|---|---|
| Pinterest | Planning and aspiration | Saves, outbound clicks, longevity of pins |
| Spotify | Mood and identity | Playlist follows, saves, shares |
| X | Live conversation | Replies, reposts, share of conversation |
| TikTok | Entertainment and discovery | Shares, watch-through, comment depth |
| Instagram | Browsing and checking out | Profile visits, follows, saves |

Algorithms change all the time. Human behaviour takes much longer. Build on the part that moves slowly.

# What Gets Lost When Organic Is the Poor Cousin

Paid media reports bigger numbers. That's its job. But time and time again, I've seen organic content outperform paid on engagement rate, virality and depth of comments. In that same grocery review, unplanned organic moments (a meme, a viral TikTok, a customer's video) drove more engagement than any paid push at almost every brand we tracked.

Organic social does four jobs paid can't do on its own.

**It's your richest source of insight.** Comments and replies are unprompted consumer research, every day, in people's own words. Most brands skim it. The smart ones feed it into the next campaign.

**It builds the brand.** Consistent presence between campaigns builds the mental availability Binet and Field showed deserves the larger share of investment.

**It's your cheapest research lab.** The posts that win organically are the ones worth putting money behind.

**It warms up your audience.** People who save, comment or visit your profile have shown intent.

Retargeting them typically costs less than cold prospecting.

And people are looking. DataReportal's Digital 2026 report shows South African internet users are almost as likely to research brands on social networks (57.1%) as on search engines (57.9%). Dismiss organic and you give up the insight that makes everything else sharper, and the evidence people look for before they buy.

## Everyone Owns a Slice. Nobody Owns the Brand.

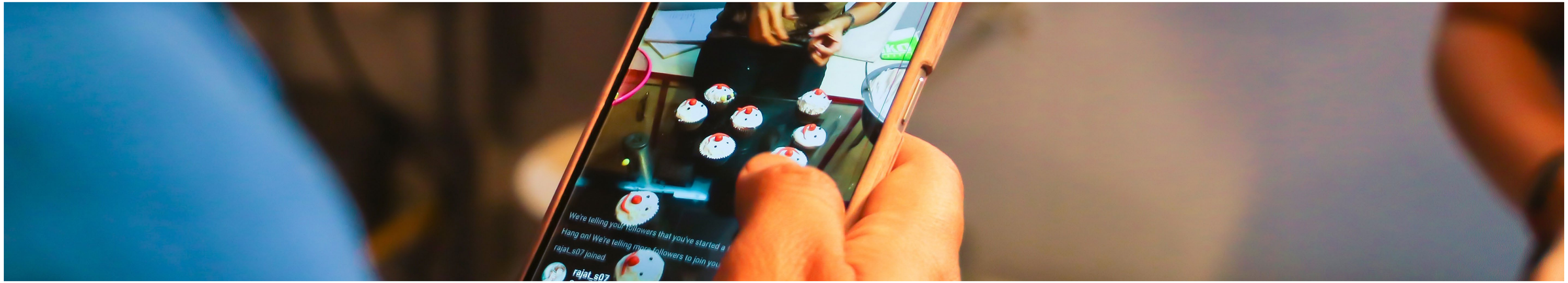
A media agency. A social agency. An SEO partner. A web team. A creative agency. Maybe PR. Each gets its slice of the brief and rushes to deliver its part, usually without looking across.

The cost shows up in three places. **You stop sounding like one brand:** customers don't experience channels, they experience your brand, and right now it sounds like five different ones. **Insights stay locked in one agency's report,** never reaching the media plan or the next brief. And **intent goes to waste:** with no paid strategy targeting people who've already engaged organically, you pay full price for audiences you'd already warmed up.

The cost is measurable. Kantar's AdReaction research found integrated campaigns are 31% more effective at building brands, rising to 57% when creative is customised for each channel. The kicker: 89% of marketers believed their campaigns were integrated. Only 52% of consumers agreed.

So here's the provocation. Integration is the client's job. Expecting agencies to self-organise across competing scopes and fees is a risk you can't afford. It's YOUR brand. Why would you not want complete alignment?

Every good magazine has an editor-in-chief. Your brand needs one too. It should be you.



## We Don’t Post. We Publish.

Anyone can post. No craft implied, no judgement required. Publishing is different: an editor decides, a standard is met, someone is accountable.

A brand’s timeline is a magazine, and the grid is its back catalogue. When someone taps through to your profile, they don’t see one post. They see every back issue at once.

That’s why page health matters, and why it’s checked far too rarely. Is the bio clear? Do the highlights help people navigate, or are they a graveyard of old campaigns? Does the grid hold together? A follow turns borrowed attention into owned attention: the only kind no algorithm can take away. It’s the cheapest stage of the funnel to fix, and the most often ignored.

## What Happens When Someone Edits the Mix

This isn’t theory. One of the brands we work with moved its organic social to an editorial model: a monthly board where performance data, social listening and brand objectives set the plan before anything gets made.

Within a year, reach, engagement, link clicks and follower growth were all up significantly on the year before, with paid boosting playing its part in reach. The brand climbed several places in its category’s share of voice, and sentiment beat its target. Even on X, the platform so many brands are walking away from, it had its strongest month yet.

None of it came from one viral post. It came from a process.

## The Editor’s Job Description

If you own a brand, here’s the role. Five responsibilities, none of which can be outsourced.

1. **Choose channels on headspace, not reach.** Ask whether your brand belongs on a platform, not whether a competitor is there.

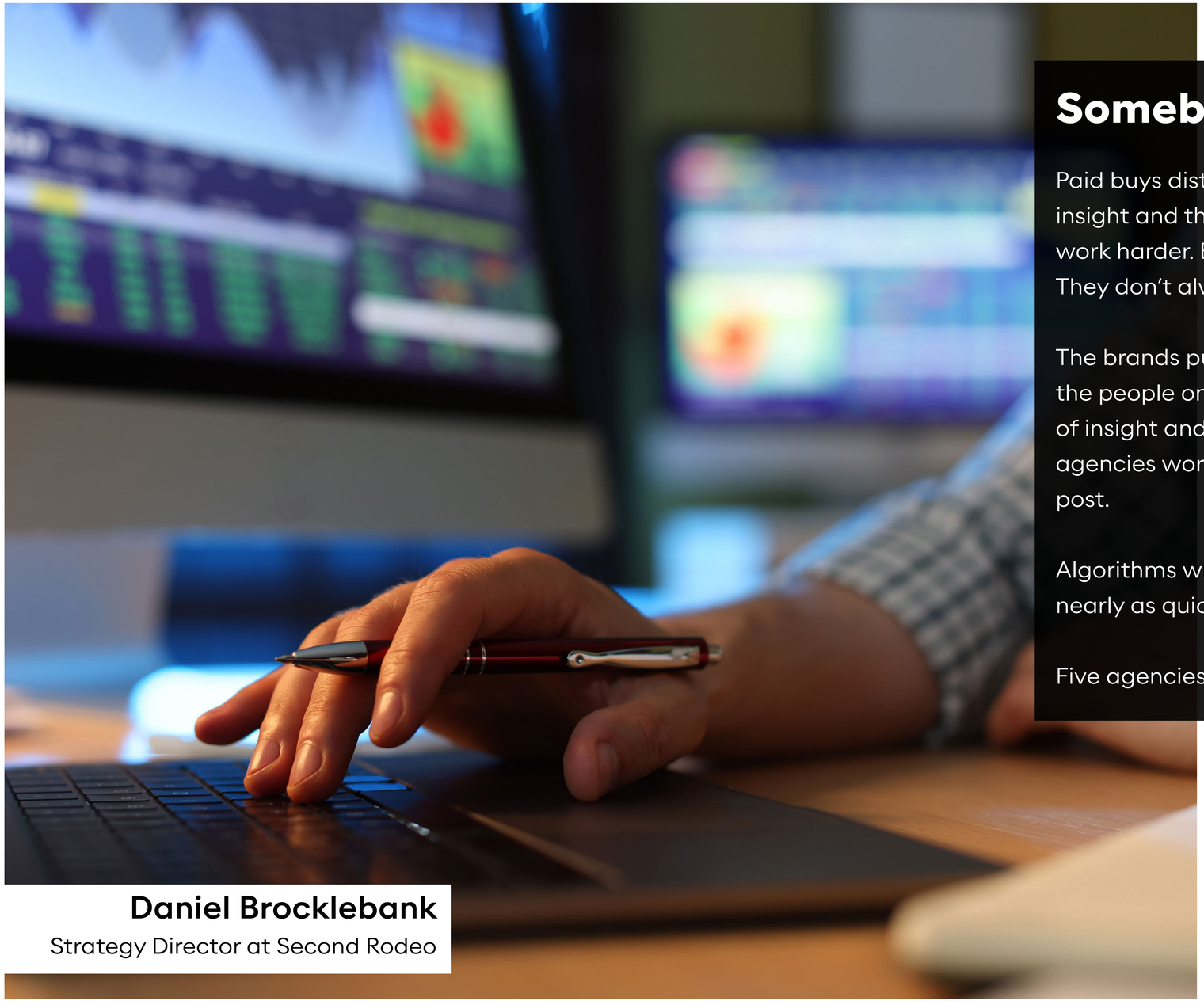
2. **Ask every agency what it’s optimising for.** Then ask how that serves the brand.

3. **Run one editorial meeting.** One monthly forum, one calendar, one set of audience definitions, every agency in the room.

4. **Read organic for its insights, not just its numbers.** Then get those insights into the media plan and the next brief.

5. **Check your shop window.** Review your profiles’ health every month.

And for agencies, including us: stop recommending what’s new or easy to sell. Recommend what fits the audience. Share your data.



**Daniel Brocklebank**
Strategy Director at Second Rodeo

# Somebody Has to Edit

Paid buys distribution. Organic earns resonance, insight and the warm audiences that make paid work harder. Bigger numbers win the meeting. They don't always win the market.

The brands pulling ahead choose channels for the people on them, treat organic as a source of insight and brand building, own how their agencies work together, and publish rather than post.

Algorithms will keep changing. People won't, not nearly as quickly.

Five agencies is fine. No editor isn't.

Sources:

- DataReportal, Digital 2025: South Africa
- Lumen, Brand Metrics and Havas attention whitepaper
- Kantar Millward Brown, AdReaction: The Art of Integration
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# Stephen Emmett

CX and AI Specialist

## Augment First, Automate Second: AI and Quality in the Contact Centre

Boards want AI magic by Christmas. Contact centre teams would settle for a knowledge base that agrees with itself. The smart place to start sits somewhere in between, and it looks a lot like quality assurance.

Every board is reading the same headlines. So the brief that lands in the contact centre is usually ambitious. AI will deflect half the contacts and take a healthy slice out of headcount, ideally before year end.

The view from the floor is rather different. The team is already short-staffed. The data feeding the AI is messier than anyone admitted in the business case. And the first proper pilot tends to show the bot happily handling the easy fifth of contacts, while the tricky four-fifths still land on an agent's desk.

Except now the customer has already been round the houses with a chatbot, and arrives with all the patience of a toddler at bedtime.

None of this means the technology doesn't work. It means boards are budgeting for the finished article while their teams are still doing the unglamorous groundwork nobody put on the roadmap. Tidying up routing. Sorting out the knowledge base. Agreeing sensible escalation paths so a person catches what the automation can't.

In my experience, the earliest real wins are much quieter than the boardroom expects. They sit in the back office and in quality, where AI makes the people you already employ measurably better at their jobs. Reset the expectation to that, and the whole programme tends to go a lot more smoothly.

# Why AI programmes stall (spoiler: it's rarely the robot)

When an AI programme grinds to a halt, the model usually gets the blame. Look below the waterline, though, and you'll almost always find one of three culprits.

**The knowledge isn't ready.** You can't automate an answer your organisation can't state clearly and consistently. If the knowledge base is out of date or contradicts itself, AI simply industrialises the confusion, then takes the blame for a mess it inherited.

**Nobody on the floor owns it.** Too often the programme is handed to IT or a central transformation team. The people who live the customer journey every day, the team leaders and quality analysts, never get a seat at the table. You end up with something technically impressive that doesn't fit how the floor actually works.

**The frontline doesn't trust it.** This is the one people are slowest to say out loud. If a tool was done to agents rather than with them, they'll quietly work around it, override it or steer customers away from it. That isn't stubbornness. It's a signal that the rollout skipped the very people it depended on.

So before questioning the technology, I'd look hard at readiness, ownership and trust. Nine times out of ten the fix is organisational, and it's a lot cheaper than another round of tooling.

## The price of rushing

Push ahead before the organisation is ready and you pay in three currencies, none of them cheap.

The first is **customer trust.** A poor automated experience is remembered far longer than a slightly slower human one. Once a bot has let a customer down, they lose faith in your other digital channels too, and head straight back to the expensive voice queue you were trying to relieve.

The second is **your people.** Drop AI on agents as a threat, or without training and reassurance, and your best and most mobile people start polishing their CVs first. In a contact centre, attrition is about as expensive as problems get.

The third is **credibility.** A visible AI flop turns "AI" into a dirty word in the boardroom, which makes the next proposal, possibly a much better one, far harder to fund. Moving too fast doesn't only cost you the pilot. It can sour the whole programme for a year or two.

## Where the real value is hiding

The use cases paying their way today are about augmentation rather than full automation. Four stand out.

- **Automated QA** that scores every interaction, not a 2% sample.
- **Real-time agent assist** that surfaces the right answer or next best action while the customer is still on the line.
- **Summarisation and wrap-up automation** that hands agents minutes back on every contact. Across a full shift, that's real capacity you didn't have to hire for.
- **Query analytics,** where AI reads across thousands of conversations and tells you why customers are actually getting in touch.

That last one is the most underrated of the lot. Picture a team convinced its biggest contact driver is billing. AI analysis of the real conversations then shows that a large share of those calls trace back to one confusing line on the invoice. Fix the line, and the calls simply stop coming. That's the contact centre acting as an insight engine for the whole business, rather than a cost centre waiting to be squeezed.

Still firmly in the "more promise than proof" column for most mid-market teams is fully autonomous resolution of complex or emotional queries. It will get there in pockets, and it's improving quickly. But if someone is selling it today as a like-for-like headcount replacement, ask to see it working on contacts as messy as yours. Then ask again.

# Manual QA has a maths problem

Quality is where I'd start, because manual QA breaks down on simple arithmetic.

A typical manual process reviews somewhere between 1% and 3% of calls, and often almost none of the digital contacts. Agents get coached on a tiny sample that may not be representative, usually weeks after the interaction, when nobody can remember what happened.

It's also inconsistent. Two analysts will score the same call differently, depending on how they read the scorecard or how their morning has gone. Agents spot that unfairness very quickly.

And it's heavily skewed towards voice. Chat, email, WhatsApp and social often get no structured review at all, simply because there aren't enough hours in the day. Add it up and you have a process that is slow, partial, subjective and blind across most of your channels. Yet leadership still reads its numbers as if they describe the whole operation.

None of this is a dig at quality teams. They're doing heroic work against an impossible ratio of interactions to reviewers. The ratio is what's broken, not the effort.

Omnichannel makes it worse. Every new channel multiplies the conversations that need checking, but QA headcount rarely follows. Nobody signs off five extra analysts on the day WhatsApp goes live. So quality leaders face an awkward choice: review the same small slice of a much bigger pie, or push the team harder and burn them out.

In regulated sectors, where one missed interaction can carry a real penalty, the stakes climb further. Sampling one conversation in fifty isn't a quality strategy. It's a gamble.

Teams rarely decide their QA process is broken through calm reflection. It usually takes a jolt. A complaint the sample should have caught. A new channel going live, and a senior leader asking how it's being checked (it isn't). A director asking how confident the team really is in that quality score, when the true answer is "extrapolated from 2% of contacts". Once leadership has seen the gap between what QA claims to cover and what it actually covers, they can't unsee it.

# What good automated QA actually looks like

The fear is understandable. A black-box robot marking agents down and quietly building a case against them. Surveillance culture, now with a dashboard. Good automated QA is close to the opposite.

It scores every interaction, across every channel, against your existing scorecard, within hours rather than weeks. Then it surfaces rather than punishes. It flags the conversations that need a human's eyes, points team leaders to an agent's recurring coaching theme, and spots an issue brewing across the floor before it ever shows up in your CSAT.

Here's the practical difference. Today, an analyst might listen to four calls per agent per month and hope they were representative. With automated QA, the analyst's morning view becomes something like fifteen conversations that need their judgement today, plus the three coaching themes trending across the team this week.

The analyst doesn't disappear in this picture. They get promoted, from data-entry scorer to coach and exception handler. And agents tend to find it fairer, because everyone is assessed on everything by the

same standard, instead of on a few cherry-picked calls that happened to land in the sample. That shift from “gotcha” to development is usually what turns a suspicious floor into a supportive one.

## The model flags, the human decides

AI earns its place on coverage and consistency. These are the objective, repeatable, high-volume checks that grind human reviewers down. Did the agent read the compliance statement? Did they follow the process? Was the customer’s sentiment sliding as the conversation went on?

A well-configured system can answer those on every single interaction. It’s especially strong on text-heavy channels like chat, email and messaging, where it reads structured language at scale without ever needing a tea break.

Humans still matter most for judgement and nuance. Was this the right, empathetic call, even though it technically broke the script? Is this a new situation the scorecard was never designed for? Did the customer mean something the words don’t quite capture?

And there’s one line I’d never cross. Any decision with real consequences for a person, whether a coaching conversation, a performance rating or anything touching someone’s job, needs a human interpreting the data. Not a machine handing down a verdict.

The AI does the reading and flagging across everything. The person does the deciding on the things that matter. Keep that line clear and automated QA supports your people instead of policing them.

## What to expect, and when

Be realistic and it's still a strong story. I'd frame it as three horizons.

1. **The first few weeks: coverage and capacity.** You go from a small sample to full visibility across every interaction and channel. Analyst hours are freed from manual scoring almost immediately, which is often the first thing a stretched team actually feels.

2. **The first three months: better coaching, plus the sleeper win.** Coaching gets faster and more consistent, because team leaders are working from complete data rather than gut feel. This is also when real insight into why customers contact you starts to land, feeding process fixes well beyond quality.

3. **Six to twelve months: the compounding effect.** This is where you'd reasonably expect measurable movement in CSAT and first-contact resolution, tighter compliance and, very often, better retention, because coaching has become fairer and more developmental.

What I'd steer anyone away from is expecting a transformed quality score in week two. The early wins are coverage and time given back. The customer outcomes follow as coaching improves, and they're well worth the short wait.

## Five questions to ask before you sign anything

If you're a cautious leader, good. Walk in with these five questions and keep asking until you get clear answers.

1. **What specific problem are we solving, and how will we measure it before and after?** "We need an AI strategy" is a slogan, not a problem.

2. **Is our data and knowledge base good enough to feed this?** If not, fixing that is the real first project.

3. **Who owns this day to day?** Not at steering-committee level. The named person on the floor who keeps it working once the novelty wears off.

4. **What happens on the day it gets something wrong?** Because it will. What's the human safety net, the monitoring and the governance around it?

5. **Can we start small?** Prove it on one journey or one channel, then expand on evidence rather than faith and vendor enthusiasm.

If a supplier gets twitchy when you ask these, especially the ones about measurement and failure, that discomfort is telling you something valuable before you've spent a cent.

# Augment first, automate second

If I could leave you with one change, it would be this. Stop asking "how do we do AI?" and start asking "where are our people spending time on work a machine could take off their plate, or help them do better?"

It sounds like a small reframe, but it changes almost everything. An intimidating technology mandate becomes a practical hunt for problems worth solving.

Start from the actual work. Think of the QA that only samples a sliver of contacts, the wrap-up time leaking minutes from every call and the mountain of customer queries nobody has time to analyse. That's where you'll find use cases that pay back quickly, keep a human in the loop and earn you the credibility for bigger, bolder moves later.

So, augment first and automate second. Then let the results make the argument for you.

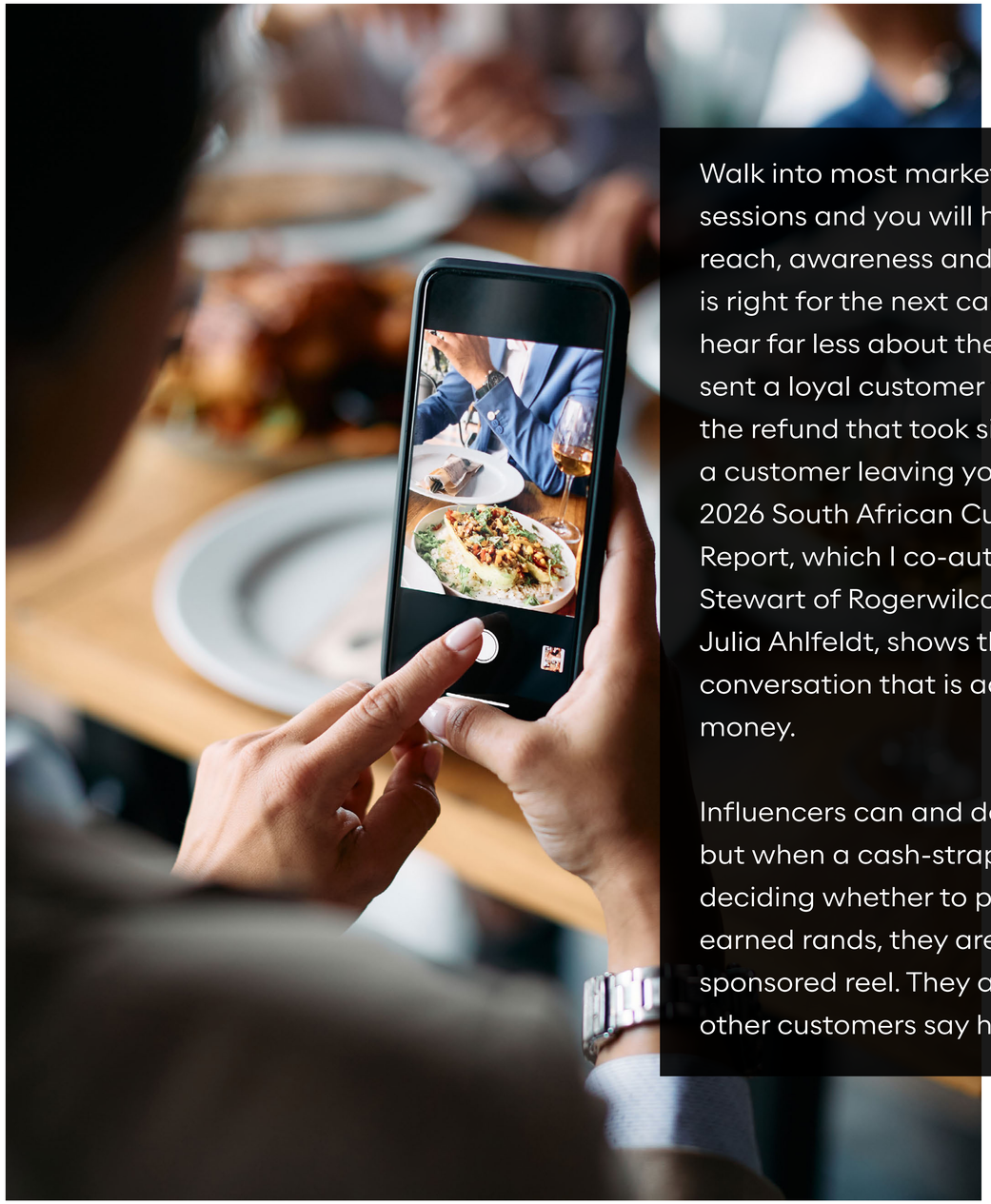
**Stephen Emmett**
CX and AI Specialist

# Amanda Reekie

Founder of ovatoyou

## Customer experience is where the revenue is

We can all agree that the traditional marketing funnel is not linear anymore and that digital media and more recently LLMs have upended the conventional “path to purchase”. Whichever way people get there, though, there is movement, no matter how swift, from awareness to understanding and then onto consideration and ultimately to purchase and re-purchase. Because it is easier, marketing budgets are often still being poured into creating visibility and awareness but we know that South African consumers are making their buying decisions somewhere else entirely.

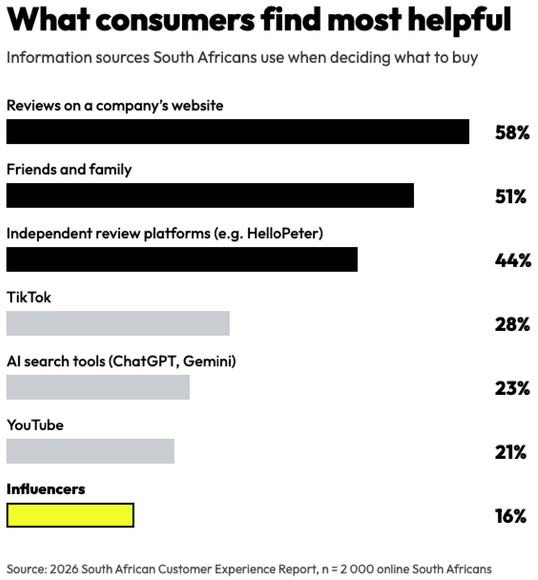


Walk into most marketing planning sessions and you will hear plenty about reach, awareness and which influencer is right for the next campaign. You will hear far less about the out-of-stock that sent a loyal customer to a competitor, or the refund that took six weeks and led to a customer leaving you forever. Yet the 2026 South African Customer Experience Report, which I co-author with Charlie Stewart of Rogerwilco and CX consultant Julia Ahlfeldt, shows that it is the second conversation that is actually moving money.

Influencers can and do catch many eyes, but when a cash-strapped consumer is deciding whether to part with their hard-earned rands, they are not looking at a sponsored reel. They are reading what other customers say happened to them.

# Social proof beats social reach

When we asked 2 000 online South Africans which information sources they find most helpful when looking for products or services, customer reviews on a company's website came out on top at 58%.[1] In this consideration phase, recommendations from friends and family followed at 51%, and independent review platforms such as HelloPeter were chosen by 44%.




Influencers were selected by just 16%. That is fewer than TikTok (28%), YouTube (21%) and even AI search tools such as ChatGPT and Gemini (23%), which most consumers only started using in the last year or two.

This is not an argument that social media is dead. Platforms like Facebook, TikTok and YouTube still play a real role in awareness and discovery, but our data suggests that when consumers move from browsing to deciding, they shift towards sources they see as more credible and more relevant to the question in front of them. Reviews and recommendations help people reduce uncertainty before they commit, and right now uncertainty is expensive.

That matters more than ever because consumers are under pressure. Seventy-two percent of this year's sample told us their financial position had stagnated or worsened over the past year, and 21% had dipped into savings or pension funds to cover monthly expenses. Value for money was the single biggest factor bringing consumers closer to a brand, cited by 71%. As my co-author Julia puts it: "Every purchase is now a high-stakes calculation. People in that position do not want to be dazzled. They want to be reassured that they will not regret the decision".

## Business is looking in the wrong place

The most revealing finding was not how consumers behave, but how differently businesses believe they behave. We put the same question to 56 business executives, most of them in senior marketing and CX roles.

Only 16% of executives thought customers find reviews on the company's own website helpful, against 58% of consumers. Independent reviews were rated by 24% of executives versus 44% of consumers.

Meanwhile, the executives overestimated influencers: 25% believed they were among the most helpful sources, compared with 16% of consumers. Instagram showed the same pattern, at 20% against 15%.

Source: 2026 South African Customer Experience Report, n = 2 000 consumers and 56 business executives

# The uncomfortable truth: you can’t brief your way to good reviews

I understand why the influencer route is attractive. You can write a brief, agree a fee, get the content approved and report on views and clicks within a fortnight. It is clean, contained and measurable and also really visible; your friends and family are high-fiving you for the new campaign.

Good reviews do not work like that. A review is simply a customer reporting on whether the promise was kept. And the things that break that promise are rarely in marketing’s hands. When we asked consumers which hurdles would make them consider taking their business elsewhere, the top answers were hidden fees and long waiting times (both 61%), poor websites and apps (53%), difficult refunds (52%), lack of follow-up (49%) and not being able to reach a person (47%). Not one of those is fixed by a better campaign.

This is where marketers find themselves in an awkward position. Over the past two decades the role has quietly shrunk, as I wrote in my chapter about marketers’ demotion.[2] Marketers used to own, or at least heavily influence, product, price and place.

Today many are left with promotion, and often only the slice of it that can be measured instantly. Product quality, pricing decisions, stock availability, the app, the contact centre and the delivery promise usually sit in someone else’s department.

So marketers make promises over which they have no control when it comes to delivery, and are then held accountable when sales drop. Strictly speaking, customer experience falls outside marketing’s remit in most organisations. That is exactly why it gets neglected, and exactly why it needs marketing’s voice at the table.

As my co-author Charlie says: “In this year’s report, the challenge is no longer simply generating awareness. It is making sure that wherever customers encounter your brand, they find evidence that backs up what your marketing promised”.

## Customer experience is where the real work happens

The reason to take on that harder work is simple: it is where retention and growth come from, in both directions.

Eighty-one percent of consumers had a negative experience in the past 12 months, up from 76% in 2024. More than half (55%) have switched away from a brand they used all the time because of a poor experience, and 52% simply stop supporting the organisation. Yet only 24% now post about a bad experience on social media or a review site, down from 50% in 2023. Customers are not complaining louder. They are leaving quietly, and no influencer campaign will win them back if the reason they left is still there.

That silence is also hiding the problem from the people who could fix it. Although 79% of businesses rely on surveys to measure CX, nearly half of consumers (49%) say that after a poor experience they give a neutral score, a higher score than deserved, or ignore the survey altogether. A healthy dashboard can be masking a very leaky bucket.

On the upside, good experiences pay forward. More than 80% of consumers tell friends and family when a brand treats them well, and 55% say they increase the amount of business they do with that brand. Remember that friends and family are the second most helpful source when people decide what to buy. Every well-kept promise is generating the very word of mouth and reviews that our data shows tip purchase decisions. And yes, I'm aware that word of mouth sounds super-retro in the late 2020s.

That is a flywheel no paid post can replicate. Good experiences create reviews and recommendations; those reviews persuade the next customer at the moment of decision. Our report concludes that customer experience is no longer only what happens after someone buys from you. It now decides whether they buy from you at all.

## The challenge for 2027

None of this means influencers have no place. They can be a useful spark at the "top of the funnel" but if your budget is weighted heavily towards attention while the experience behind it is broken, you are paying to send people towards a door that disappoints them.

So here is my challenge to marketers heading into 2027:

1. Walk the journey before you buy the media. Before the next campaign goes live, try to buy, return and complain as a customer would. If the checkout is clunky or the delivery promise is vague, fix that first.

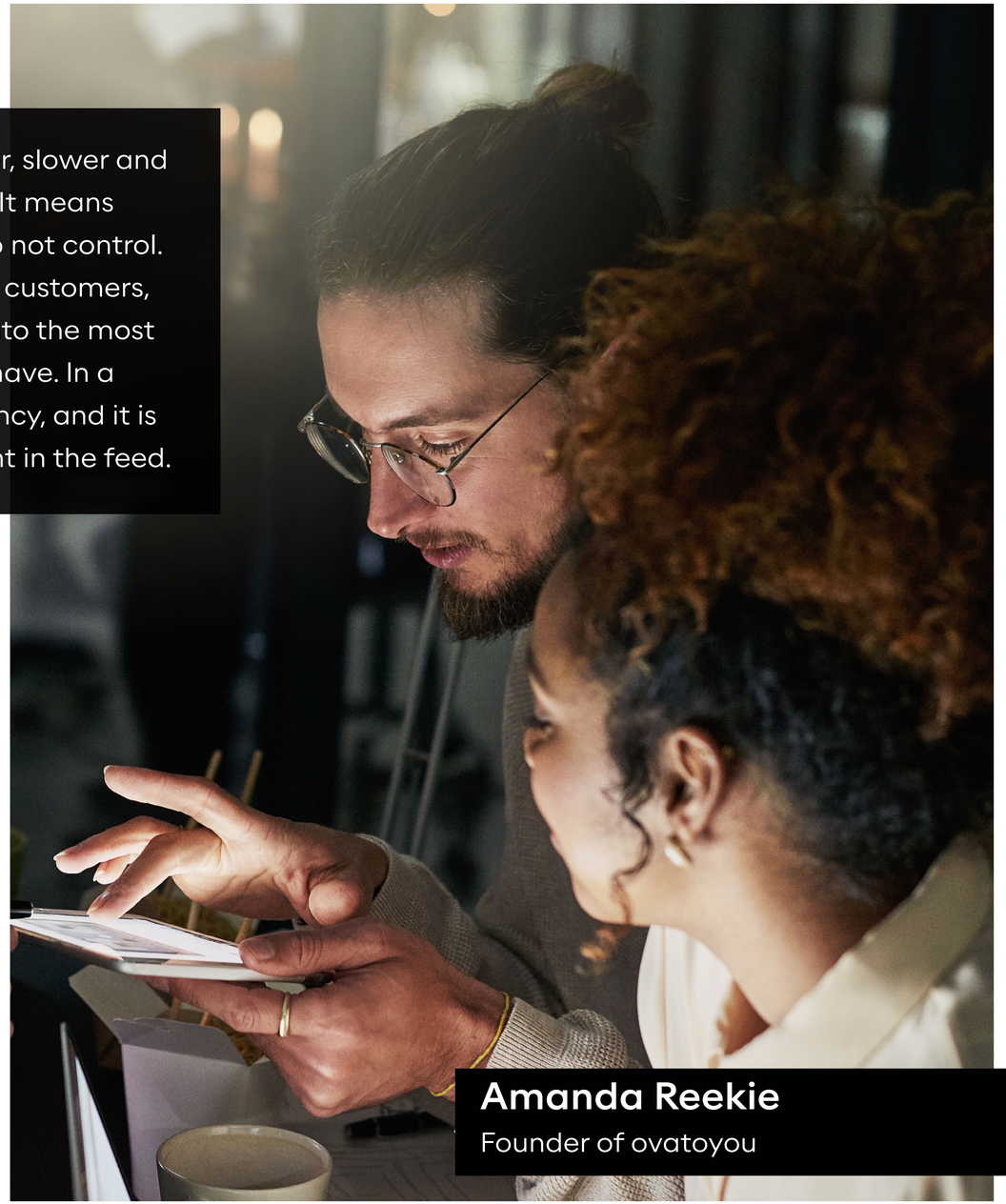
2. Read your reviews like a strategy document. Your own site's reviews and platforms like HelloPeter tell you which promises are being broken, in your customers' own words.

3. Buy your Head of Operations a coffee. Your results depend on their ability to deliver what you advertise. Align what you promise with what the business can actually keep.

4. Measure behaviour (internal and external), not just scores. Track repeat purchase, retention and switching alongside NPS and CSAT, and treat silence as a warning, not a compliment.

5. Leave your desk. Too many organisations operate in a vacuum, looking only internally at their own NPS and behavioural stats without looking outside to competitors but even more importantly to the actual end-user themselves. As I said in the report, “It is perilous to rely on a single score to understand how customers feel about your brand”. You need to understand your brand in the context of a customer’s broader life and choices.

Fixing customer experience is harder, slower and messier than briefing an influencer. It means working across departments you do not control. And yet, this is the work that retains customers, grows their spend and turns them into the most persuasive marketing channel you have. In a pressure economy, trust is the currency, and it is earned in the experience, not bought in the feed.



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Founder of ovatoyou

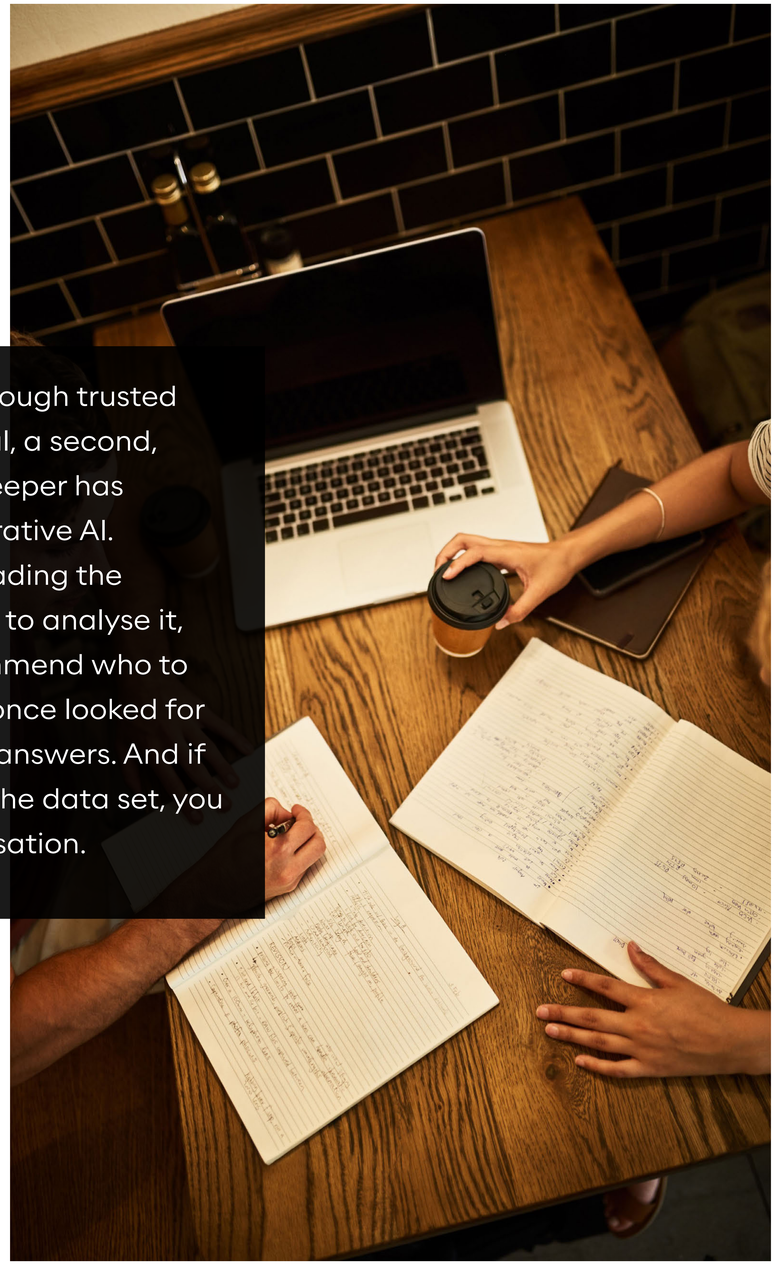
Sources:
[1] 2026 South African Customer Experience Report (2 000 consumers, 56 executives, Q2 2026)
[2] Reekie, A. (2026). ‘The Relegation of Marketing from the Boardroom to the Dashboard.’ In *Brand Builders*, 10 Voices, 1 Vision series.

# Beverley Houston

Founder of Be-cause Integrated Communications

## The new media landscape: Where journalists look for stories, AI now looks for answers

The rules of brand visibility have shifted. For decades, the PR formula was straightforward: build authentic relationships with journalists, pitch compelling stories, navigate the live news cycle, and earn top-tier print, broadcast, and digital coverage. If you secured the coverage, the audience followed.



While earning media through trusted newsrooms remains vital, a second, equally powerful gatekeeper has entered the room: generative AI. Audiences aren't just reading the news; they are asking AI to analyse it, summarise it and recommend who to trust. Where journalists once looked for stories, AI now looks for answers. And if your brand isn't part of the data set, you don't exist in the conversation.

# The shift from keywords to context

Search Engine Optimisation (SEO) taught brands to chase keywords and fight for top placement on search engine results pages. But Answer Engine Optimisation (AEO), the architecture behind models like ChatGPT, Perplexity, and Gemini, doesn't care about repeating words to rank. It cares about authority, consensus, and third-party validation.

When an AI engine processes a query about an industry, an SMME, or a corporate leader, it scrapes vast ecosystems of information to construct a coherent answer. Where does it find that trusted context?
In the exact same place top-tier journalists look: earned media.

> "60% to 70%+ of journalists use Google, search engines, and expert databases to research topics and find new commentary sources when they don't have an existing contact."
> - Cision's State of the Media and PR Newswire reports.

Articles in credible publications, broadcast interviews, industry reports, and expert commentary serve as the primary training grounds for AI answers. A brand that regularly earns coverage in respected media outlets isn't just reaching readers, it's training the algorithms that will inform potential clients, partners, and investors.

## Earned PR is your digital track record

Paid media and corporate ads carry very little weight in the eyes of an AI engine designed to filter out promotional noise. Earned PR, on the other hand, acts as a solid, verifiable track record of credibility. When a brand consistently delivers expert insights, responds swiftly to newsroom demands, and maintains a clean, active media presence, two things happen:

1. Human trust: You build real-time authority and reputation across traditional and digital channels.

2. Algorithmic trust: You establish a permanent, reliable footprint that AI engines pull from when asked for industry leaders, market experts, or category solutions.

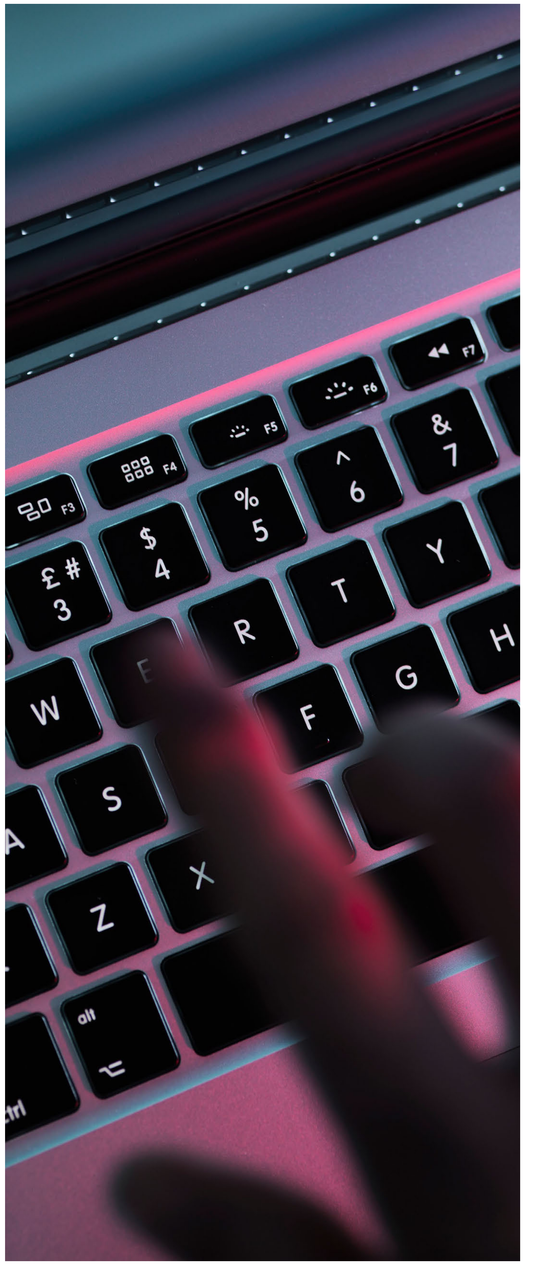
## Navigating the dual audience

To win in this landscape, communications strategies must now speak to a dual audience. This doesn't mean abandoning the fundamentals of good storytelling. On the contrary, it makes the core principles of PR even more non-negotiable:

- Clarity over clutter: Express core value propositions and industry perspectives clearly. Ambiguity gets ignored by journalists and misconstrued by AI.

- Consistency in authority: Building an authentic voice trusted by the algorithm requires consistent media presence over time, once-off campaigns no longer cut it.

- Third-party validation: Securing coverage in top-tier, authoritative publications carries exponential value. The higher the authority of the host media, the higher the weight AI places on the information.



## The bottom line

The rise of AI doesn't spell the death of public relations; it marks its revival as a business-critical function. As the lines between news gathering and AI answers blur, brands can no longer afford to treat PR as a secondary marketing tactic. The stories you secure in today's media cycle are directly building the answers AI will give about your business tomorrow.

If you want to be part of the future narrative, start by earning your place in the newsroom.

**Beverley Houston**

Founder of Be-cause Integrated Communications

kinsta

## Kinsta

### AI is changing the web, but the new landscape doesn’t make your website less important

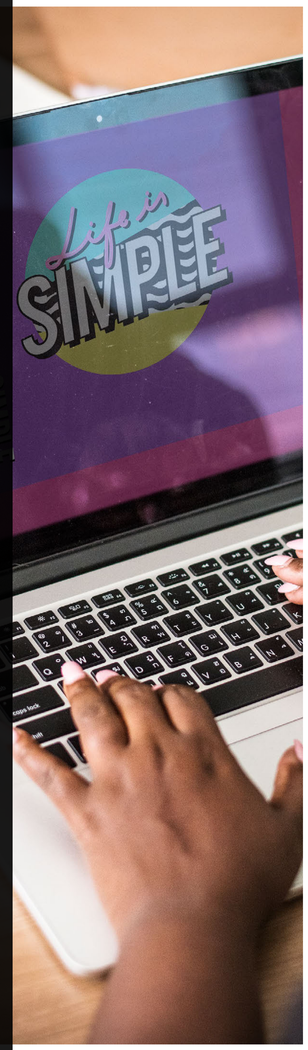
For most of my career, I’ve thought about websites from the top down: the architecture, the user experience, the design, the narrative, the content, and how it all culminates in making a brand impression.

Christina Scannapiego
Head of Content at Kinsta

Working at a web infrastructure company has made me think much more about what's happening underneath all of those components, too. What's become even clearer is: AI is making those two worlds even more difficult to separate. At Kinsta, we recently looked at AI from both sides:

On one side, we analyzed infrastructure data from more than 5,000 WordPress sites to understand how AI crawlers are actually interacting with websites. On the other, we surveyed more than 1,000 US consumers about how they use AI to discover brands and products, how much they trust the information AI serves them, and what actions they actually take when armed with that information.

Put these two sides of the same story together, and they illustrate something much more complex than simply, "AI is changing search," which is a vast oversimplification that the digital marketing world has been running with. The more accurate take seems to land on: AI is changing the role of the website itself.




## AI isn't hitting every website the same way

There is no "average" website when it comes to AI. One of the things that struck me most about our crawler research was just how misleading averages can be. Across thousands of websites, AI bots represented 6.13% of total bandwidth, which sounds like a useful benchmark.

Except the median site saw only 1.57%.

And what's more, upwards of 1,000 of the sites we studied saw no AI-bot bandwidth at all. At the other extreme, AI bots represented 90.3% of bandwidth at the 99th percentile: a gaping 57x difference.

But how much AI traffic a site gets is only a small slice of the fuller picture. What those crawlers do once they get there looks very different from traffic requests from actual human beings, too. Depending on the measurement, roughly 77% to 91% of AI-crawler requests went to dynamic or otherwise uncacheable content. For humans, that number hovered around 18% to 19%.

The behavior matters because a request isn't just a request. One that can be served from cache and one that requires the application to generate something dynamically may look identical on a traffic report, but they're very different from an infrastructure perspective.

For website owners, the question therefore isn't simply, "How much AI traffic are we getting?"

It's: **"What is AI actually doing when it gets here?"**

And then there's a parallel question marketers need to be asking at the same time:

**What are people doing after AI gets there first?**

AI isn't simply another source of traffic hitting the website; it's often the middleman sitting between your brand and the person trying to discover it.

Our consumer research found that 59.2% of respondents use AI tools often or occasionally when they're researching something. More than half sometimes or often skip websites entirely during that process.

And I get it.

AI is fast. You can ask a question, refine it, ask another question and compare options without opening 14 tabs and fighting your way through pop-ups, ads and pages written primarily to rank. It gives us an efficient Reader's Digest version of what we're after.

But do we trust it?

Only 18.8% of the consumers we surveyed said they always trust an AI product recommendation without doing additional research. And 58% said they trust content less once they suspect it was AI-generated.

The second part is particularly interesting to me as a digital marketer focused on content.

We're introducing AI into more and more of the discovery journey at exactly the same time consumers are becoming more aware — and more suspicious — of AI-generated information.

So where do they go when they want to know if something is actually true?

Back to the source: your website.

## The website is becoming the verification layer

Nearly 45% of the people we surveyed said they always or most of the time visit a company's website after receiving an AI recommendation. Another 25% do it occasionally. So, what they find there matters to your brand trust, loyalty and bottom line. In fact, more than 61% said they associate the quality of a company's website with the quality of its products or services.

The dominant conversation in the field is about the speculation that AI discovery will eventually make the website less important, but I think we're looking squarely into the face of an argument for almost the opposite scenario.

The website may no longer own every step of discovery. AI might introduce someone to your company. It might summarise your product. It might compare you to three competitors before that person has seen a single page you've designed and published.

But when they do come to you, they're coming with context and possibly a preconceived idea about you and your products or services. They may be verifying a claim, checking your pricing, and checking out exactly who you are. Often, they're trying to figure out whether the recommendation they just received feels credible.

Therefore, the website isn't simply a destination anymore. In some buyer journeys, it becomes the proof and the infrastructure has to perform for increasingly complex automated traffic.

Your content has to be clear, accessible and understandable to the systems interpreting it.

Your brand has to be recognisable and resonate with the correct audience after some of the discovery process has happened somewhere else. Your website has to be fast, and easy to use and navigate. Because when an actual human arrives, the experience still has to earn their trust.

# Two audiences, one website

I don’t think the takeaway here is that every business should suddenly redesign its entire web strategy around AI. Our infrastructure data actually argues against this kind of one-size-fits-all reaction precisely because some sites are seeing enormous amounts of AI crawler activity while others are seeing very little. You need to understand what is happening on your site before deciding what warrants a response.

I think the bigger shift is: We’ve spent years thinking about websites primarily as something built for people, with web crawlers and search engines helping those people find them. While, if you think about it, even though the concept essentially hasn’t changed much, the shape of the journey certainly has.

Automated systems increasingly interact with the website directly, consume its information and influence what humans encounter elsewhere. Then humans may get there, but sometimes later in the journey, and they’re making judgement calls and informed decisions of their own.

The same website has to survive both encounters.

As someone who has spent most of her career obsessed with what brands say and how they say it, this new journey makes the website more interesting and its job more important to me, not less.

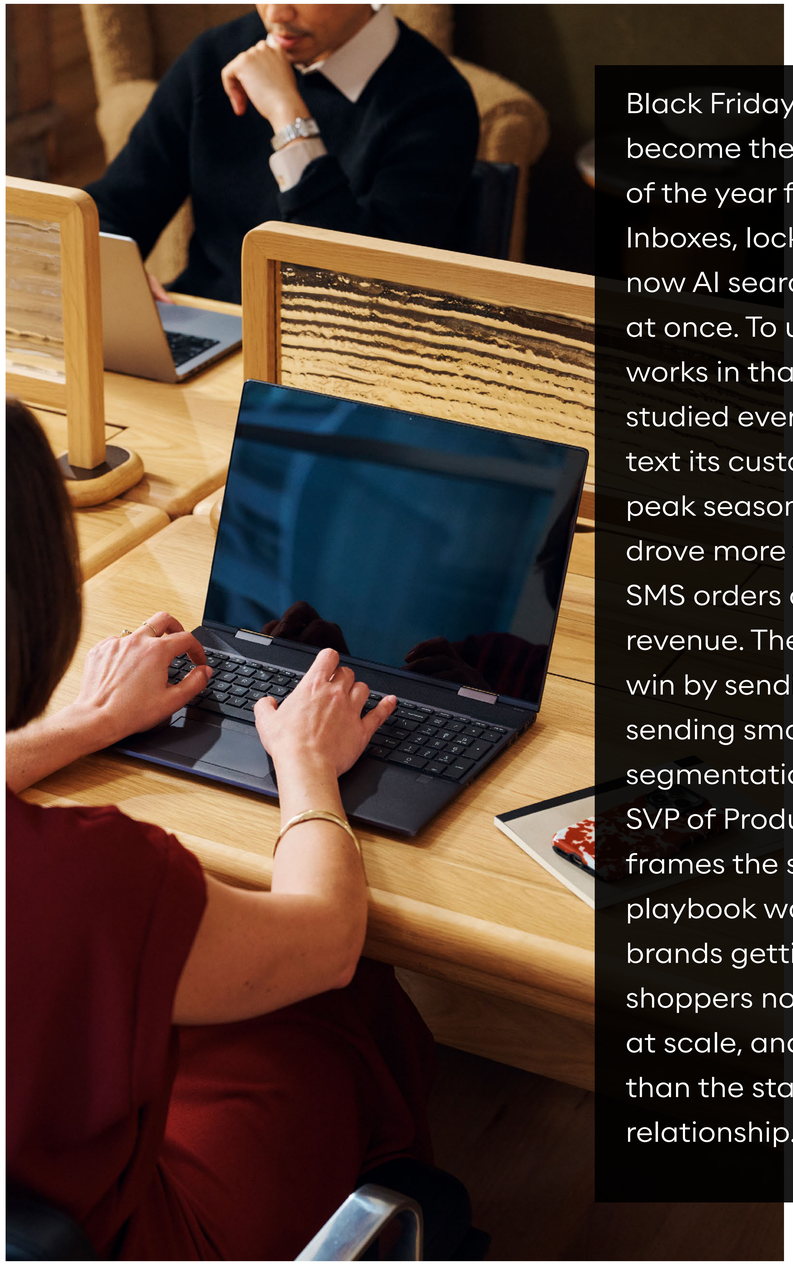
Because underneath all the conversations about AI traffic, crawlers, search, LLMs and changing discovery behavior, there’s still a very human question at the end of it: **When someone finally gets to you, do they want and believe what they see?**

intuit
mailchimp

# Intuit Mailchimp

## Send Less, Earn More: Key Findings From Intuit Mailchimp's 2025 Holiday Season

What a Year of Peak Season Data Reveals About Year-Round Growth - from source: Breaking Through Peak Season Noise.



Black Friday Cyber Monday (BFCM) has become the single hardest moment of the year for a brand to be noticed. Inboxes, lock screens, ad feeds, and now AI search results are all saturated at once. To understand what actually works in that environment, Mailchimp studied every marketing email and bulk text its customers sent across the 62-day peak season of 2025. Those messages drove more than 7.5 million email and SMS orders and over $1.1 billion in gross revenue. The brands that won did not win by sending more; they won by sending smarter, using AI, automation, segmentation, and timing. Jack Tam, SVP of Product and Engineering, frames the shift this way: the old BFCM playbook was pure volume, but the brands getting through to high-value shoppers now are the ones personalising at scale, and Q4 is less a finish line than the start of a year-long customer relationship.

# Email carries the revenue; SMS carries the efficiency

Email still produced the overwhelming majority of peak season revenue, largely because Mailchimp customers sent more than 500 times as many emails as texts. But on a per-message basis, SMS was the stronger channel on nearly every measure.

| Metric (Oct 31–Dec 31, 2025) | Email | SMS |
|---|---|---|
| Gross revenue | $1,132,707,427 | $8,219,537 |
| Revenue per order | $151.90 | $127.71 |
| Order rate | 0.02% | 0.08% |
| Revenue per message | $0.03 | $0.10 |

Daily SMS order rates ranged from 0.03% to 0.25% over the season, versus 0.01% to 0.04% for email. At their respective peaks, texts delivered six times the order rate of email, three times the revenue per message, and eight times the clicks per message delivered.

What to do: If SMS or WhatsApp isn't in your stack yet, adding it is probably the fastest engagement gain available before the season starts. Start collecting opt-ins now with an on-brand website popup that spells out the benefit, promote your mobile program to your existing email list and social followers, and tell subscribers exactly what kind of texts to expect. Fitness brand Gymwrap consolidated email and SMS onto one platform ahead of the holidays and saw a 142x return on its first SMS launch, with 30% of revenue attributed to Mailchimp.

# Email fatigue is real, and the best senders send less

Mailchimp's earlier consumer research found 39% of global shoppers feel overwhelmed by the volume of sales and deals, and 25% avoid major sales events altogether. That fatigue shows up in the data: email conversion peaks during Cyber Week and decays as December goes on, yet many brands respond by sending more.

The top-performing senders do the opposite. During BFCM 2025, the top 10% of Mailchimp accounts by click rate averaged a 10% click rate, compared with 1.2% for everyone else, and they achieved that while sending 56 times fewer emails.

SMS held up far better through the busiest days. Black Friday alone saw 5.43 million texts sent (against a season average of about 1.125 million per day), and those messages still earned a 16.2% click rate, about three points above the season norm.

| Date | Holiday | Email sent | Email click | Email conv. | SMS sent | SMS click | SMS conv. |
|---|---|---|---|---|---|---|---|
| Oct 31 | Halloween | 910M | 1.68% | 0.17% | 1.27M | 15.9% | 0.09% |
| Nov 11 | Veterans/Singles' Day | 825M | 2.40% | 0.15% | 1.42M | 17.0% | 0.06% |
| Nov 26 | Pre-Thanksgiving | 1.01B | 1.61% | 0.18% | 1.65M | 14.1% | 0.07% |
| Nov 27 | Thanksgiving | 930M | 1.51% | 0.23% | 1.52M | 15.1% | 0.09% |
| Nov 28 | Black Friday | 1.39B | 1.30% | 0.23% | 5.43M | 16.2% | 0.08% |
| Nov 29 | Small Business Sat. | 542M | 1.22% | 0.17% | 1.56M | 15.1% | 0.18% |
| Dec 1 | Cyber Monday | 1.30B | 1.58% | 0.18% | 3.41M | 17.3% | 0.11% |
| Dec 2 | Giving Tuesday | 1.15B | 1.59% | 0.12% | 2.43M | 15.4% | 0.12% |
| Dec 24 | Christmas Eve | 605M | 1.37% | 0.10% | 966K | 12.3% | 0.06% |
| Dec 25 | Christmas Day | 360M | 1.23% | 0.14% | 507K | 11.8% | 0.09% |
| Dec 26 | Boxing Day | 555M | 1.38% | 0.14% | 1.56M | 16.4% | 0.05% |
| Dec 31 | New Year's Eve | 675M | 1.34% | 0.12% | 1.84M | 15.5% | 0.05% |

The best email click rates came on Veterans/Singles' Day, Black Friday, and Cyber Monday. For SMS, the top three were Cyber Monday, Veterans/Singles' Day, and Boxing Day.

What to do: Front-load your biggest offers. Shoppers are more receptive to email early in the season, while SMS engagement spikes repeatedly throughout. Reward early birds in October and November, then nurture repeat browsers with automations. As people move from checking off wishlists to hunting for ideas, shift toward inspirational gift content, and close the season with shipping deadlines and real-time availability.

# BFCM weekend: the crowded days and the empty one

Demand on the big days hasn't faded. Mailchimp's Holiday Shopping Unwrapped report found 75% of global shoppers bought something on Black Friday and 37% on Cyber Monday. But send volume tracks demand almost perfectly, which is the problem. Between Nov 20 and Dec 8, email volume hovered around 900M–1B on weekdays, dropped to 340M–410M on weekends, and spiked to 1.39B on Black Friday and 1.30B on Cyber Monday. SMS followed the same shape, with 5.43M texts on Black Friday and 3.41M on Cyber Monday against roughly 1.3M–1.9M on ordinary weekdays.

The exception is Sunday. On Nov 30, 2025, Mailchimp customers sent 59% fewer emails and 83% fewer texts than they had on Black Friday. There is no named shopping holiday that day, which makes it open territory. Send anyway, or go further and brand the day as your own moment ("Self-Care Sunday," for example), keeping promotions live while competitors go quiet.

The shoulder days around BFCM also outperformed. Across the extended Nov 26–Dec 2 window, SMS averaged a 15.7% click rate and email 1.4%, with both channels dipping on Black Friday itself:

| Date | Email click | SMS click | Email rev./msg | SMS rev./msg |
|---|---|---|---|---|
| Nov 26 | 1.61% | 14.1% | $0.02 | $0.10 |
| Nov 27 | 1.51% | 15.1% | $0.03 | $0.13 |
| Nov 28 (Black Friday) | 1.30% | 16.2% | $0.03 | $0.12 |
| Nov 29 | 1.22% | 15.1% | $0.05 | $0.28 |
| Nov 30 | 1.27% | 16.6% | $0.05 | $0.22 |
| Dec 1 (Cyber Monday) | 1.58% | 17.3% | $0.03 | $0.16 |
| Dec 2 | 1.59% | 15.4% | $0.02 | $0.13 |

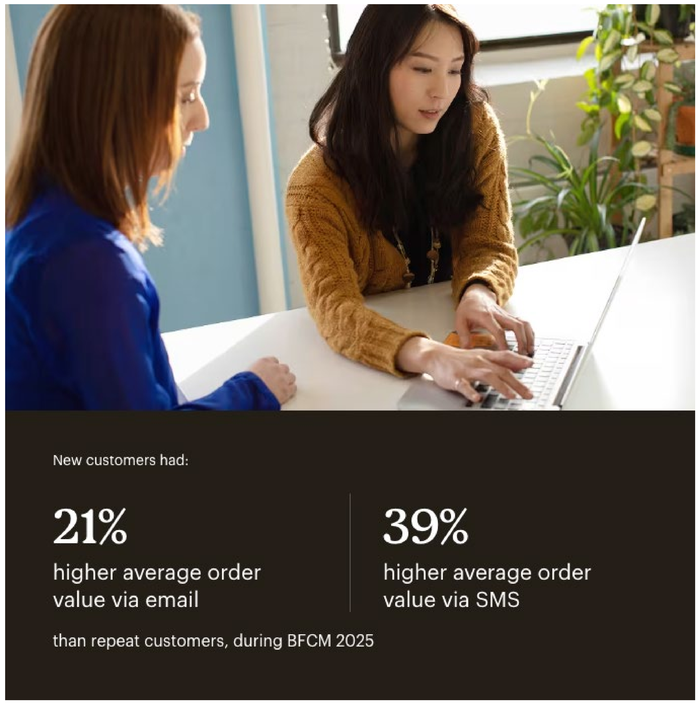
Revenue per message peaked on the quiet weekend, not the headline days. SMS hit $0.28 per message on Small Business Saturday, and email reached $0.05 on both Saturday and Sunday. Across the broader Nov 20–Dec 8 window, email ranged from $0.02 to $0.05 and SMS from $0.06 to $0.28.

The two channels also reinforce each other. Among customers running both email and SMS during BFCM, texts generated nearly 20% of combined e-commerce revenue ($1.6M of $8.2M), a bigger share than SMS-only senders saw.

# New customers spend more than regulars

First-time buyers were the most valuable shoppers of BFCM 2025. Via email, new customers had a 21% higher average order value than repeat buyers ($157.83 vs. $129.90); via SMS the gap was 39% ($157.68 vs. $113.11). New customers also made up 59.1% of email orders and 69.8% of SMS orders. Repeat customers may already own what they need from a brand, or may be waiting for Monday's deeper discount, while newcomers arrive without that history and convert readily on a welcome offer.

What to do: Aim your strongest offers at first-time buyers, build post-purchase welcome and win-back flows before BFCM so new contacts stick around into the new year, and judge the weekend by customers acquired, not revenue alone. Event producer C3 Presents, whose top revenue channel is SMS, consolidated email and SMS onto one platform and estimated 40% cost savings while delivering more than 30 million texts in six months.




# Let timing and targeting do the work

Weekends. Order rates were twice as high on weekends as on weekdays, even though 11 of the season's 12 key shopping days fell on weekdays. Email order rates peaked at 0.04% on Nov 29–30; SMS peaked two weekends earlier, at 0.25% on Nov 15 and 0.23% on Nov 1. Yet brands cut weekend send volume about 60% below weekday levels, pulling back exactly when shoppers were most ready to buy.

Features that lifted email performance. Emails built with generative AI (450M sent during peak season) posted a 50% higher order rate and 33% higher conversion rate than standard sends. Segmented and personalised emails drove 11% higher average order value during BFCM ($166 vs. $150), but only about 6 billion of the 44 billion-plus peak season emails used them, so most brands were still blasting. Abandoned cart blocks lifted open rates 36% and click rates 28%. Video raised click rates 20%; images (used in 1B+ BFCM emails) raised them 6%.

Features that lifted SMS performance. Segmented texts earned 6% higher click rates. Plain SMS had both the highest click rate and the highest unsubscribe

rate, while RCS ran lower on both.

Priority Bicycles illustrates the approach: instead of emailing its whole list, it targeted recently engaged shoppers and layered on an abandoned cart flow with a time-limited code, tripling abandoned cart conversions quarter over quarter and generating more than $68,000 from a single bundle campaign.

## BFCM is the top of your funnel

Mailchimp customers added 516.8 million email contacts and 20.6 million SMS contacts during peak season 2025. Email acquisition ran roughly 16–23 million per weekday and 5–10 million per weekend day, with high points of 23M on Nov 24 and Dec 2 and 25M on Dec 19. SMS opt-ins surged four to five times above the early-November baseline on Nov 25 (1.2M) and Nov 26 (1.1M), just before Black Friday, then spiked again Dec 9 (1.1M) ahead of the holidays. Shoppers hand over contact details when deals feel imminent.

Those contacts stay. Unsubscribes totaled 31 million, about 6% of new contacts. And 16.6% of customers acquired during peak season bought again in Q1 2026, with a median of 26 days to repurchase.

What to do: Launch early-access and get-the-code-first popups by mid-November, keep acquisition running through December, and plan your Q1 re-engagement flow now.

# Five takeaways

1. Prioritise weekends and shoulder days. The most crowded moments are the hardest to win; the quiet ones are open.

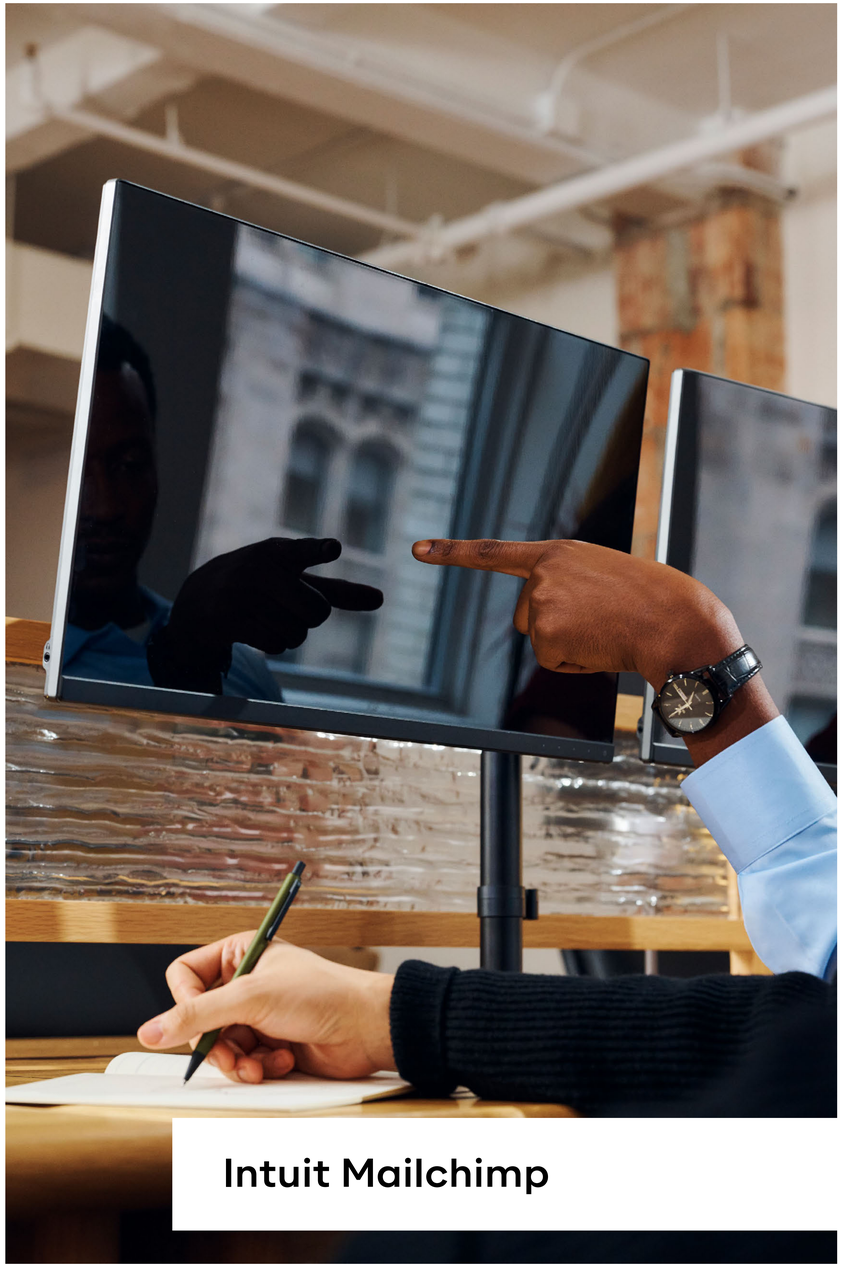
2. Use customer data. Segmentation and personalisation make each order bigger. Send more meaningfully, not more often.

3. Lean into generative AI. Test AI-built creative and automations early, then scale what works from October.

4. Nurture new contacts after the rush. 500M+ contacts joined during peak season; the ones you keep fund next year.

5. Give email and SMS different jobs. Email builds steady momentum; SMS drives time-sensitive spikes. Running both covers the whole season.

To read the full report, visit:
https://mailchimp.com/resources/breaking-through-peak-season-noise/#Peak_season



Intuit Mailchimp

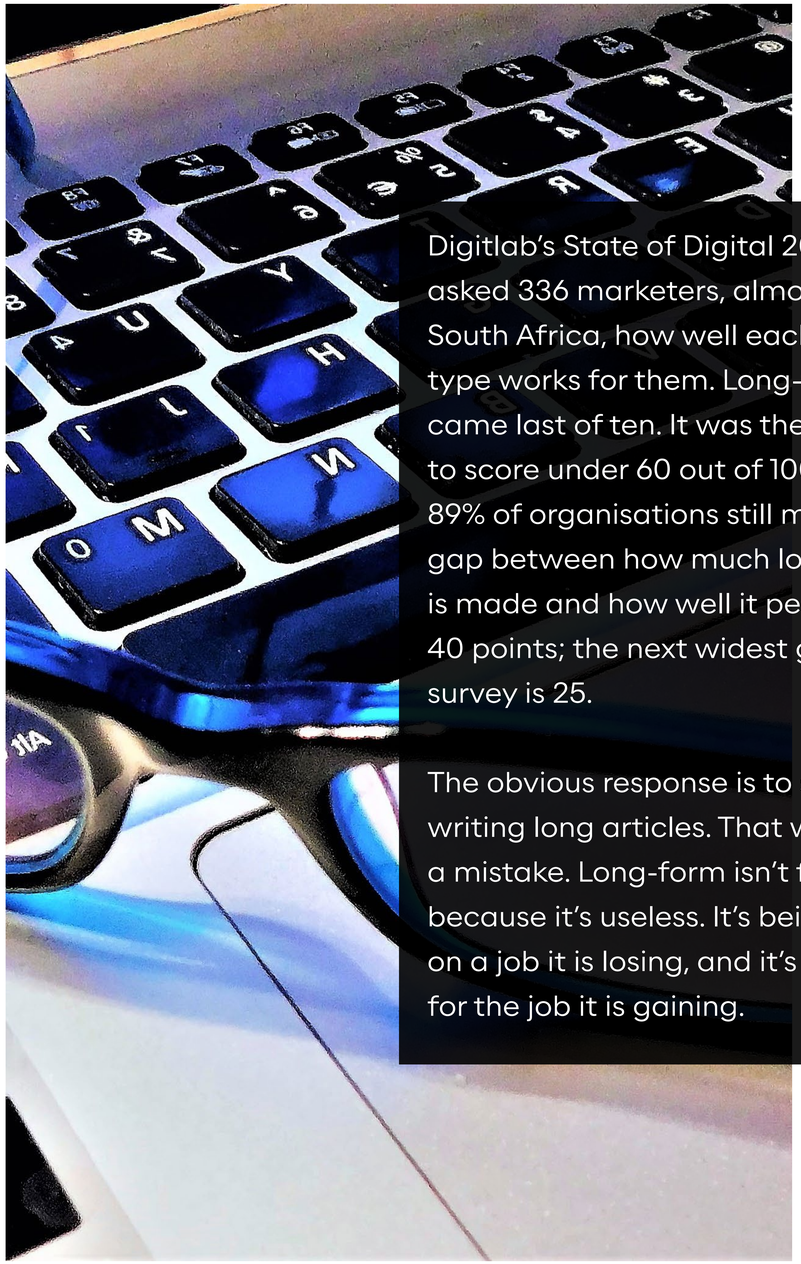
SEMRUSH

## Semrush & Digitlab

# Long-form isn’t dead. It has a new first reader.

South African marketers face a paradox. They publish a lot of long-form content, yet rate it the least effective format they make.

Maura Nardacci
Regional Sales Director APAC & MENA at Semrush



Digitlab's State of Digital 2026 survey asked 336 marketers, almost all in South Africa, how well each content type works for them. Long-form came last of ten. It was the only type to score under 60 out of 100, and yet 89% of organisations still make it. The gap between how much long-form is made and how well it performs is 40 points; the next widest gap in the survey is 25.

The obvious response is to stop writing long articles. That would be a mistake. Long-form isn't failing because it's useless. It's being judged on a job it is losing, and it's built badly for the job it is gaining.

# The old job vs the new reader

For a decade, long-form content had one job: rank on Google, earn the click, and turn the reader into a lead. Success meant page views, time on page and gated downloads.

Those numbers are falling for reasons marketers don't control. When Google shows an AI-generated summary at the top of the results, only 8% of users click through to an organic result, according to Pew Research. When no summary appears, 15% do. An article can lose about half its clicks without anything about it changing.

People still read long-form. But more and more often, an artificial intelligence (AI) tool reads it first. Tools such as ChatGPT, Perplexity and Google's AI Overviews read web pages and answer the buyer's question directly. Instead of scrolling through ten links, buyers ask for a recommendation.

Semrush's 2025 study of more than 500 digital marketing and search engine optimisation (SEO) topics projected that AI search could send more visitors to websites than traditional search by early 2028, sooner if Google makes its AI Mode the default. The visitors who do click through are worth more. On conversion rate, the average AI search visitor was worth 4.4 times the average traditional organic visitor, because the AI answer has already done the comparison for them. The study covered marketing and SEO topics rather than every industry, and its traffic figures are projections, not South African measurements. The direction, though, is clear.

Getting your content included in those answers is called answer engine optimisation (AEO). It builds on SEO rather than replacing it: the authority that helps a site rank also makes it more likely to be cited. And when a buyer asks a detailed question, a short social post rarely answers it on its own. A well-built guide often does, which makes it the format marketers can least afford to give up.

## You don’t have to rank first to be the answer

This is the most encouraging finding for small and mid-sized businesses. In Semrush’s research, when ChatGPT search cited a web page, that page ranked in position 21 or lower on Google for related queries almost 90% of the time. Half the links in ChatGPT’s answers pointed to business and service websites, not publishers or forums.

The reason is how AI tools read. They don’t judge a page as a whole; they pull the single passage that best answers a specific question. A broad guide competing with international publishers for a general term will rarely win. A precise answer to a narrow question can, even on a small site.

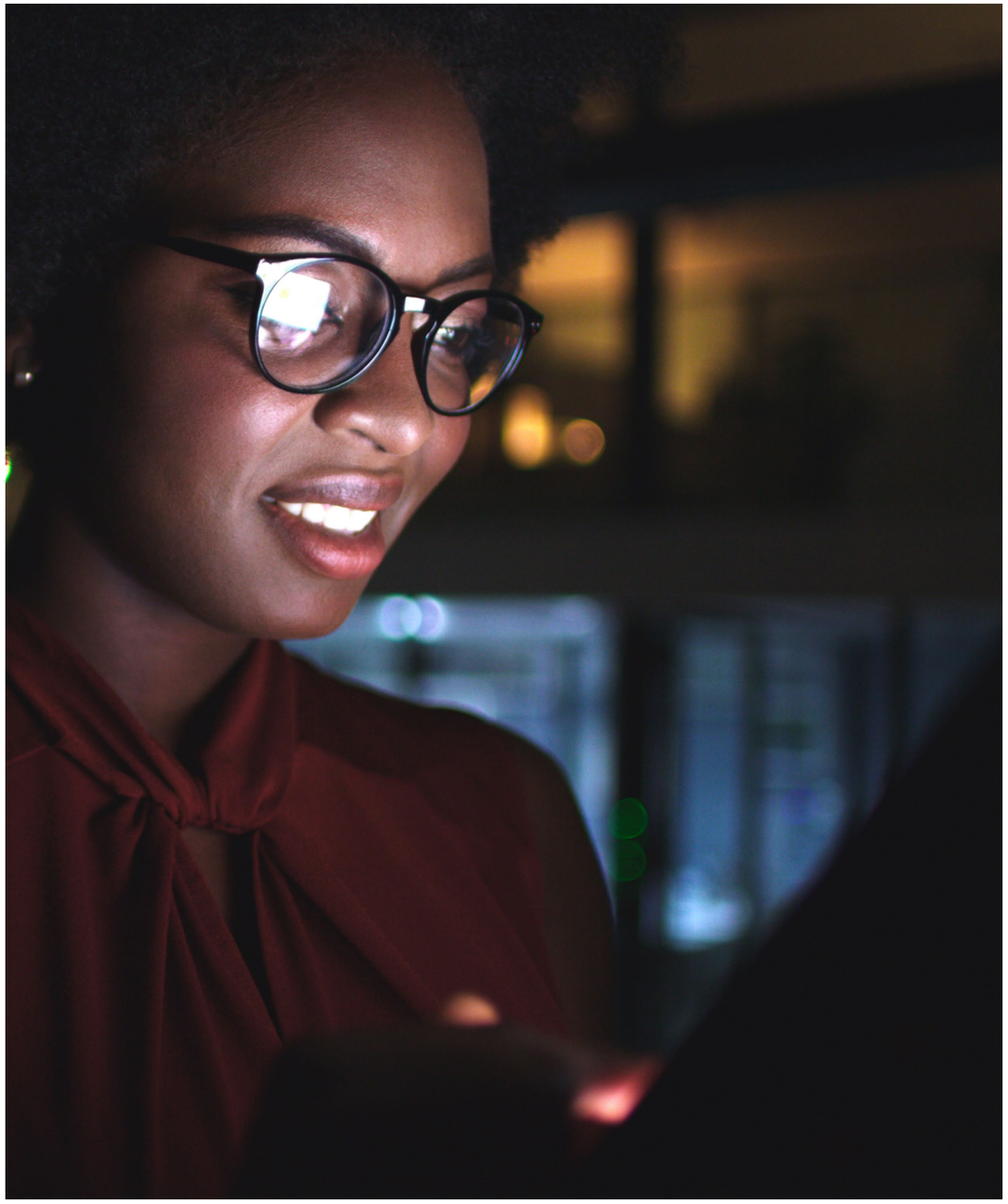
Take a hypothetical example. A South African logistics company is unlikely to reach page one for a broad term such as “freight forwarding”. A clear guide to the documents needed for a cross-border shipment, say from Gauteng into Botswana, gives it a far better chance of being the passage an AI tool quotes when a buyer asks that exact question.

This matters most in business-to-business (B2B) marketing. In Digitlab’s survey, B2B organisations rated long-form and thought leadership higher than consumer-facing businesses did. B2B buyers research for longer before they speak to anyone, and increasingly that research starts with an AI tool.

## Six ways to make long-form easier for AI tools to cite

Most long-form is written for a reader who starts at the top and reads to the end: a slow set-up, with the point saved for later. An AI tool lifts one passage and moves on, so that structure works against you. These six changes help, without making the content worse for people.

1. Answer first. Open each section with a direct answer of under about 40 words that makes sense on its own, without “this” or “as mentioned above”. Supporting detail comes after.
2. Use question headings. Write subheadings as the questions buyers actually ask, such as “How long does approval take?”. They are easier to match to a prompt than “Additional considerations”.
3. Go narrower. Answer the specific questions your sales and support teams hear every week, rather than writing another general guide. Comparison guides that set out how your offer differs from the alternatives are especially useful.
4. Publish what only you know. First-hand experience and original data, such as local pricing, regulatory detail and your own research, are things an AI tool can’t produce itself. That makes them more likely to be cited.
5. Use consistent names. Give each product, service and method one name and keep to it. Switching between versions makes it harder for AI tools to connect your brand to what you offer.
6. Keep pages current and machine-readable. Update facts, figures and examples properly; changing the publish date alone does nothing. Make sure pages can be crawled and don’t rely on JavaScript to display the main content, because many AI crawlers don’t run it.



# Measure citations,  not just clicks

If long-form's job is to be cited, page views will undercount it. Some visitors who come from an AI answer arrive with no referrer and show up as direct traffic. Others see your brand recommended in an AI answer, skip your site, and search for you days later.

This market is already short of the measures that would catch that. Digitlab found that six in ten organisations say they track return on investment, but only one in four can attribute revenue to digital at all.

Three low-cost measures close much of the gap:

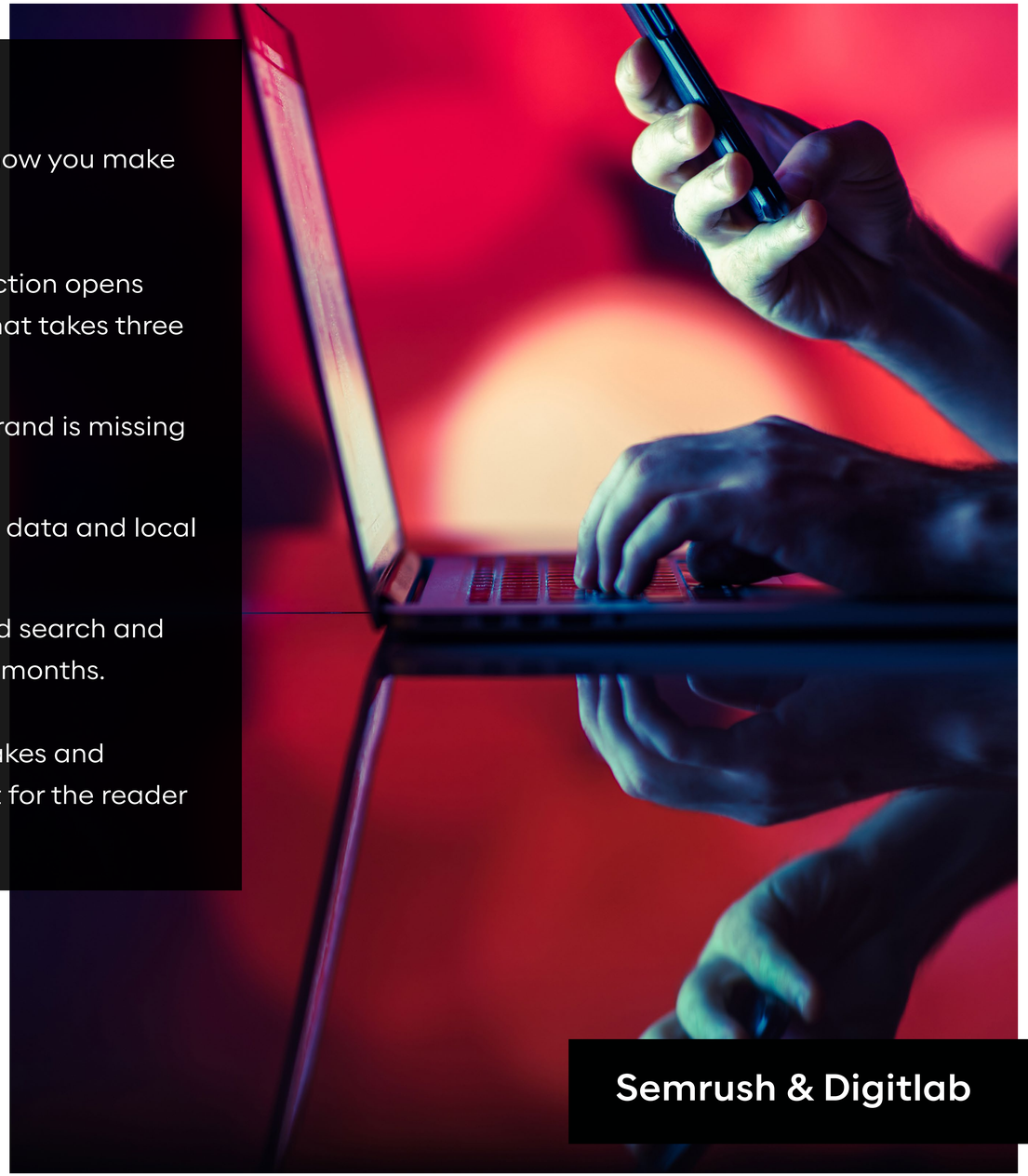
1. Self-reported attribution. Add "How did you hear about us?" to contact forms and sales calls, and include AI tools as an option.
2. Branded search. Track how many people search for your company name. A rise with no campaign running is one of the clearest signs your content is being seen elsewhere.
3. A monthly AI citation check. List your buyers' 20 most common questions. Each month, run them through ChatGPT, Perplexity and Google, and record whether you are cited or a competitor is. A spreadsheet is enough to start; AI visibility tools, including Semrush's, do it at scale.

# What to do this quarter

Don’t delete your blog posts or stop writing in-depth guides. Change how you make and measure them.

1. Audit your ten most important articles. Check that every main section opens with a clear answer that stands on its own. Rewrite any section that takes three paragraphs to reach the point.
2. Map 20 buyer questions. Test them in AI tools to see where your brand is missing and who is cited instead.
3. Fill the gaps. Write sharp, answer-first guides backed by your own data and local knowledge.
4. Set the new measures before you publish. Track citations, branded search and “How did you hear about us?” answers, and review them after six months.

The State of Digital data is right: long-form, as most of this market makes and measures it, isn’t working. The answer isn’t less of it. It’s long-form built for the reader that now often reads it first.



Semrush & Digitlab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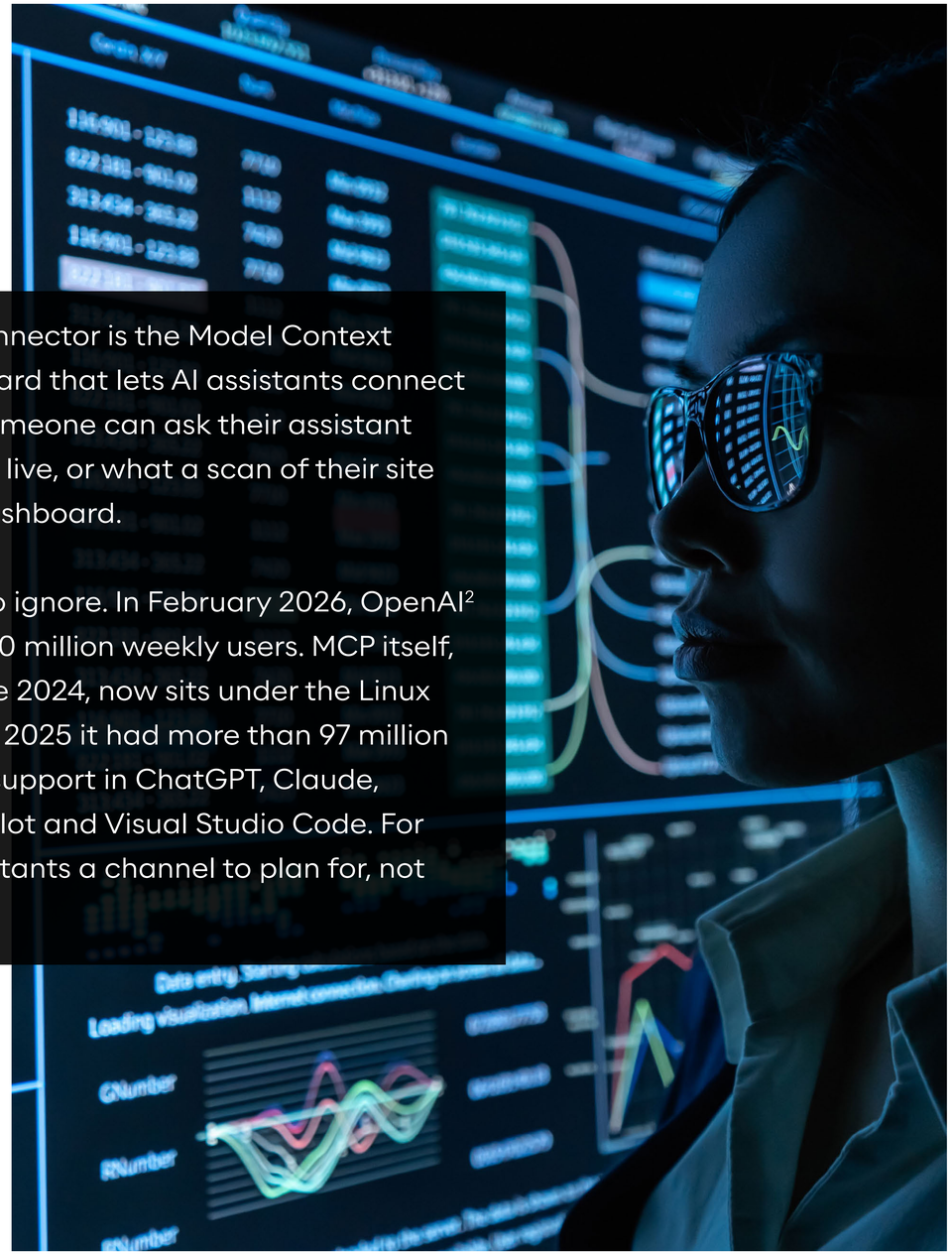
Shreya R Nambiar
Senior Content Writer at CookieYes

## CookieYes

# What launching inside ChatGPT and Claude taught us about discovery

This year we put CookieYes[1], our consent management platform, inside Claude and ChatGPT. It is tempting to treat AI assistant directories as a new discovery channel: get listed, describe the product well, and new users will follow. Our experience was different, and more useful for anyone planning their marketing for 2027.



The technology behind the connector is the Model Context Protocol (MCP), an open standard that lets AI assistants connect to outside tools. In practice, someone can ask their assistant whether their cookie banner is live, or what a scan of their site found, without opening our dashboard.

The scale behind this is hard to ignore. In February 2026, OpenAI[2] said ChatGPT had reached 900 million weekly users. MCP itself, introduced by Anthropic in late 2024, now sits under the Linux Foundation, and by the end of 2025 it had more than 97 million monthly SDK downloads and support in ChatGPT, Claude, Cursor, Gemini, Microsoft Copilot and Visual Studio Code. For marketers, that makes AI assistants a channel to plan for, not just watch.

# Here is what we learned about how people actually found and used it

## 1. Your customers are your first channel

About nine in ten people who connected already had a CookieYes account. For most of them, the directory wasn't where they first came across CookieYes. They wanted a tool they already used inside the assistant they already use.

Our biggest jump in new connections didn't line up with either listing going live. It lined up with a product update email to our existing users.

The lesson is unglamorous. Before you chase discovery in a new channel, tell the people who already know you that you're in it. In our case, they made up most of the early users.

The smaller group who were new to us moved quickly, connecting within a day or two of signing up on average. But for an established product, the bigger value of an assistant connector may be keeping your tool inside the places customers already work, rather than finding new customers.

## 2. Your product will show up in places you didn't list

We listed in two directories. People connected from dozens of AI apps, and about one in four came from outside Anthropic's own apps. Within Claude, the only place we can measure tool use so far, coding tools accounted for most of it.

The connector is built so that compatible AI apps can connect without us registering each one by hand. The map of where your product appears is no longer one you draw entirely yourself.

It also widened who we were talking to. A consent tool usually speaks to site owners, marketers and legal teams. Here, much of the measurable use came from coding tools, so part of our audience now meets us inside a code editor.

## 3. Describe yourself for machines as well as people

Two descriptions mattered. The first was the listing people read. Our first version sold a convenience: managing consent without leaving the chat. We rewrote it around the laws it covers (GDPR and CCPA), who it is for and example questions to ask.

The second was the description the AI reads. Anthropic approved our Claude listing after one change to our tool descriptions: we replaced step-by-step instructions in one tool description with a short note on what the tool does, when to use it and what it returns.

Getting to that review took longer than the review itself. Our first submission went in through a form. By the time we resubmitted months later, the process had moved to a directory portal, and approval then took days.

Two practical notes for anyone following. Read the directory policies before you build, because they are fixed. And check your website's favicon, because that is where the directory took our icon from.

Anyone who has written for search engines will recognise this. Part of your audience is now software, and in our experience the same habits applied: say what the thing does, plainly, and leave out the padding.

## 4. You don’t control how you’re presented

The same connector can come across differently in different assistants. When a scan was blocked because a user hadn’t verified their email address, Claude passed on that reason. ChatGPT suggested starting the scan from our dashboard instead.

The lesson for us was to write error messages and responses that any assistant can relay word for word. The point carries beyond connectors. You can supply the facts, but you don’t control how an assistant phrases them. Writing so your words survive being repeated is the part you can control.

The same applies when people ask an assistant about your brand rather than use your product through it. The assistant builds its answer from the sources it can find, and those are not always current or correct. Checking what assistants say about you, and fixing the sources behind wrong answers, is worth adding to your routine.

## 5. Getting connected is the hard part

Almost nobody who saw the access request declined it, and about four in five people who approved went on to use a tool.

This suggests most of the drop-off happens earlier: adding the connector, signing in from inside the assistant and, for new users, creating an account along the way.

Those steps run on screens the assistant controls. The MCP specification uses OAuth 2.1 for sign-in, so the assistant opens a browser, the person logs in and approves access, and the assistant receives a token. Your login page has to work smoothly inside that flow.

For marketers, this is the new broken link. In an assistant, a failed sign-in ends the experience before it starts, and no amount of listing copy makes up for it.

## 6. A listing is a start, not a launch

On their own, the listings grew slowly, even with the launch support we would give any other channel.

Around the same time, we released an open-source consent SDK on npm and GitHub, for the same developers we were now meeting inside code editors.

These are early steps, and we are still learning.

# What this means for marketers in 2027

You don’t need to build an AI connector to act on any of this.

1. **Start with the customers you have.** For us, they made up most of the early users.

2. **Expect to appear in places you didn’t choose.** Track where people actually use you, not just where you listed.

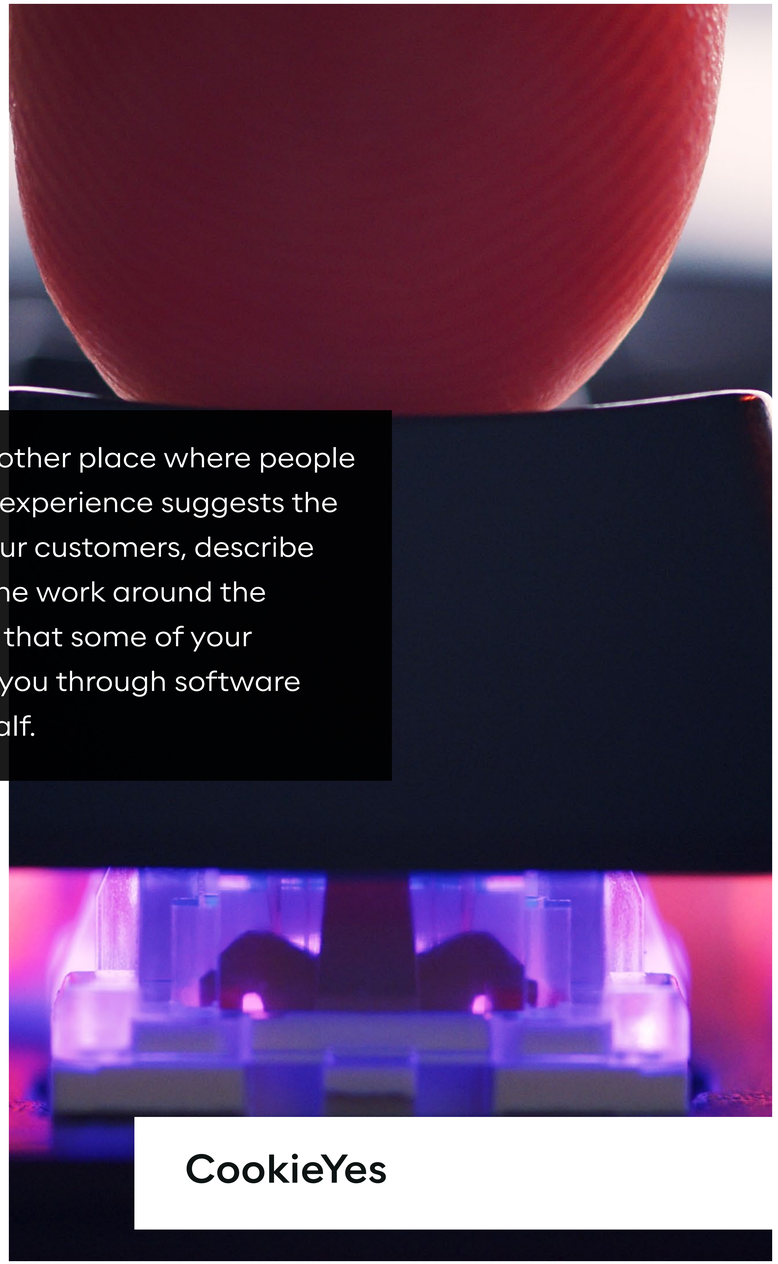
3. **Write for software as well as people.** AI assistants read your tool and product descriptions. For us, a plainer tool description was the change that cleared review.

4. **Make your facts hard to misquote.** We saw two assistants relay the same error differently. Write messages that still make sense when repeated word for word.

5. **Test the path to first use.** Our numbers suggest most drop-off happens before anyone sees a permission screen. Walk through sign-up and sign-in the way a new user would.

6. **Be clear about what you let AI tools access.** Connectors act with real permissions on real accounts. For South African businesses, POPIA applies to personal information processed by automated means, so the same obligations apply when an AI tool does the work.

AI assistants are now another place where people use products. So far, our experience suggests the basics still hold: know your customers, describe yourself clearly and do the work around the launch. What changes is that some of your audience will now meet you through software that speaks on your behalf.

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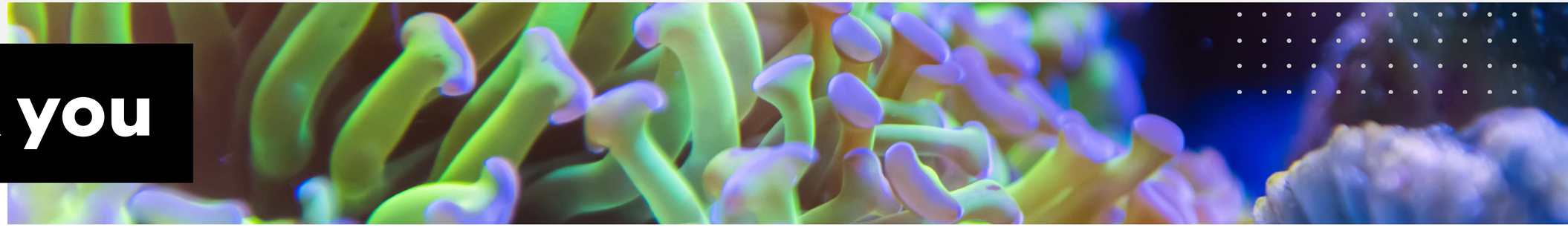
From us at
digitlab

# 04 Wrapping Up

Until next year

# Thank you



When we started this research, we had a simple question: what marketing actually builds a business? We wanted to help businesses focus on what matters, rather than chase the next trend. We started humbly, without imagining how much it would grow.

The industry's response and support have been wonderful to experience. To the 336 marketers and business people who completed this year's State of Digital survey, thank you for your time and honesty. What I value most is the chance to look at what people actually do, rather than what we assume they do. Each year, we adapt the survey while keeping the core questions that let us track change. Those patterns are making this research more interesting with every edition.

To Bronwyn Williams, Jean-Pierre Murray-Kline, Michelle Matthee, TJ Moezelaar, Daniel Brocklebank, Stephen Emmett, Amanda Reekie and Beverley Houston: thank you for bringing your own thinking to this report. I value that your opinions are your own, including where they challenge our findings. We do not need everyone to agree. We need an honest conversation between the data, expert experience and the people deciding what to do next.

Thank you also to Kinsta, Intuit Mailchimp and CookieYes for sharing evidence from your platforms, and to Semrush for co-authoring the long-form content piece with us. Your contributions bring perspectives we could not offer on our own.

To my team at Digitlab, I have seen the passion, the late nights and the time spent looking beneath the obvious findings. Thank you for staying with the data long enough to uncover the nuances. There was so much to share that we introduced a dedicated data book, giving this report room to focus on what we are learning. I am grateful, too, for the thought behind the design, the balance of the report, and how we will keep sharing its lessons through our social, web and PR channels in the months ahead. There is a lot of care in all of that, and I do not take it for granted.

Finally, to you as the reader: I hope this work helps you plan meaningfully for 2027. We have brought the data and different perspectives together so you can weigh them against the realities of your own business. To everyone who has been part of this project, thank you. We started with a question. Your support has helped us build something that I hope will make a real difference to businesses across South Africa.

Mike Saunders
CEO, Digitlab

# About Digitlab

Knowing where to invest in marketing is not always straightforward. For 16 years, Digitlab has helped businesses make those decisions with greater confidence. We are based in South Africa and support businesses here and across the globe, from Switzerland to Cape Town and from New Zealand to Miami.

As growth consultants, we help you understand what is holding growth back and decide where to focus. We also work alongside you to put those decisions into practice, supporting the whole customer acquisition journey or the parts where you need us:

We manage the whole pipeline of business acquisition, or any part of it, in partnership with our clients:

- Search engine optimisation (SEO) and answer engine optimisation (AEO) help customers find you through search and AI answers.
- Customer relationship management (CRM) and sales automation help you make better use of customer data.
- Advertising and websites help turn that interest into business.
- Content marketing across all 1st Party and 3rd party platforms

Partnerships with HubSpot, Semrush, Mailchimp and Kinsta support this work, providing platforms that can grow as great as your ambition.

If this report has raised questions about your own business, we would welcome a conversation. We can begin with what you are seeing, what your data says, and where you would value a clearer picture.
You can find us at [www.digitlab.co.za](http://www.digitlab.co.za)

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**CookieYes**

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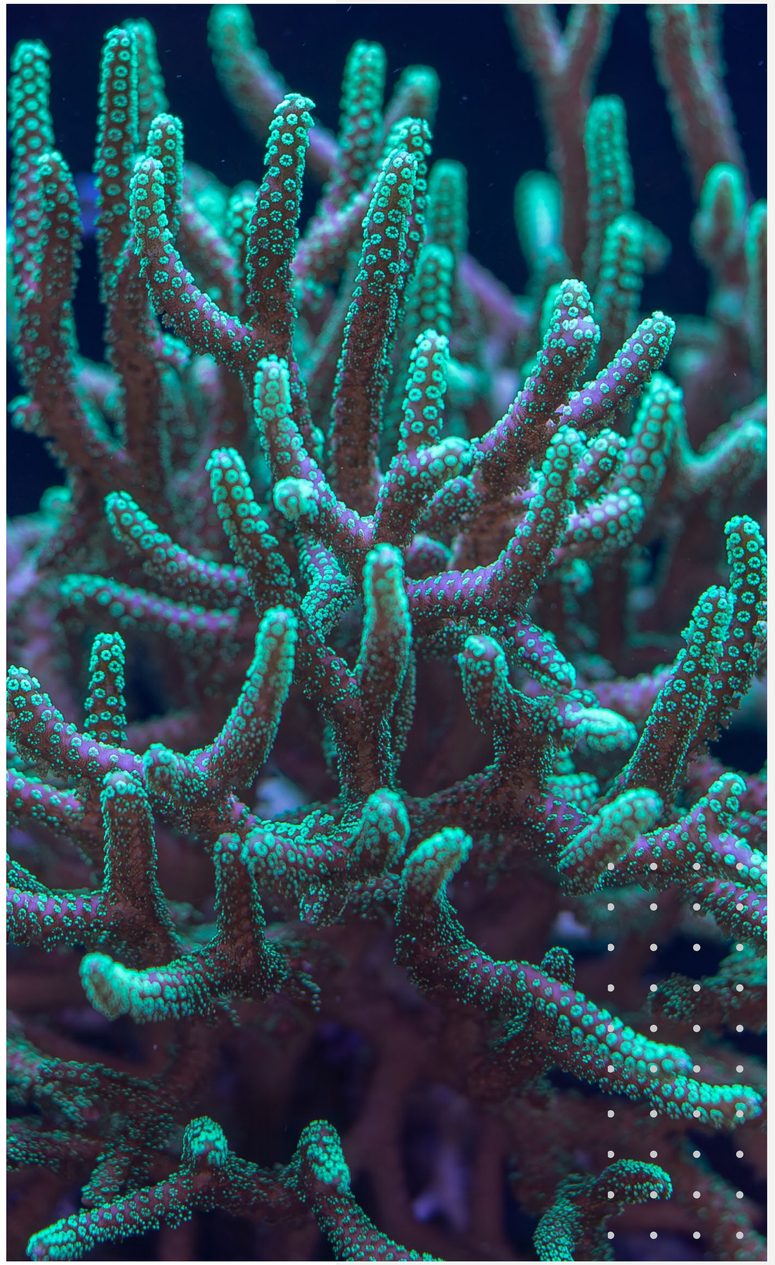

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