



STATE OF THE NATION BRAND REPORT

2022-2023

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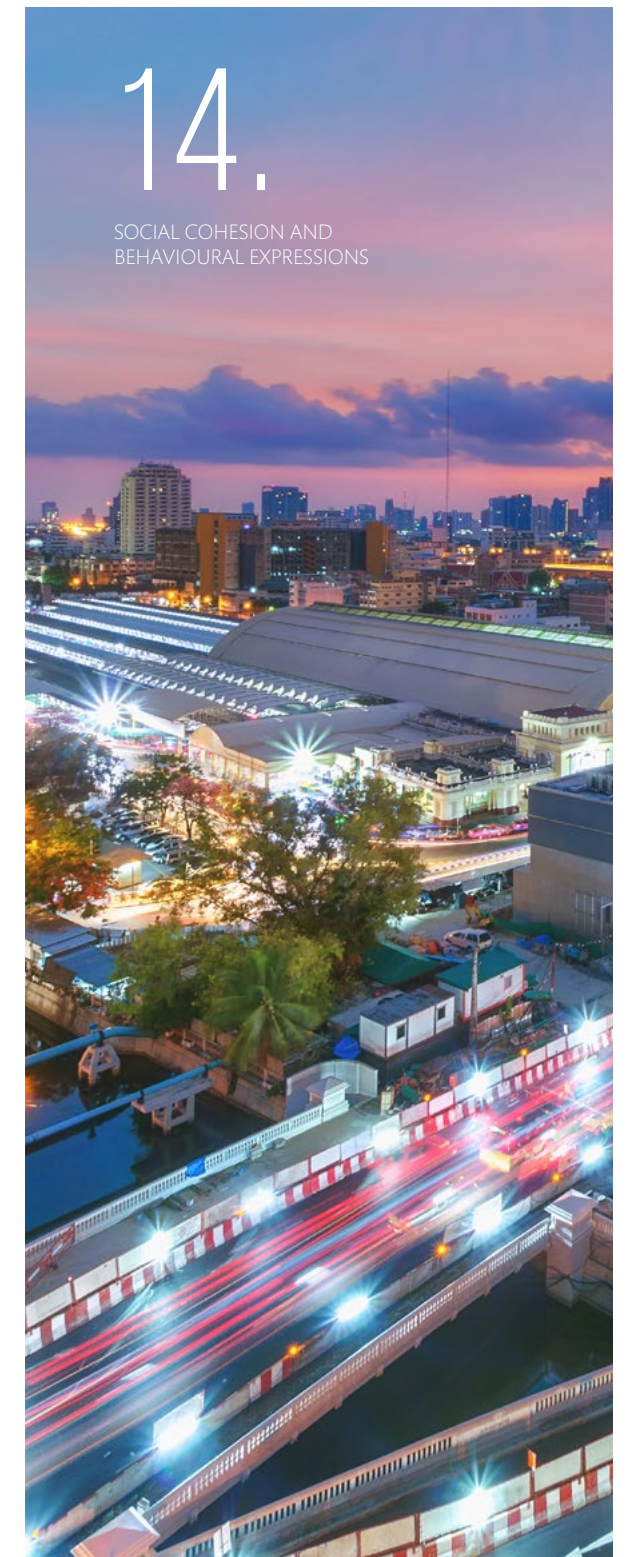
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> FOREWORD

Since the dawn of democracy in South Africa, the rest of the world has since held a great deal of opinions about our country, its people, economy and overall governance. These opinions spread across some of the most favourable and some of the worst.

Although international media was at the fore of these perpetuated perceptions of our country, South Africans both in the country and the diaspora, were not passive in the developments or lack thereof that shaped how we are perceived as a nation. In this detailed State of the Nation Report, we take a focused view of South Africa through consolidated insights gathered by the multi award-winning researcher and Managing Director of MarkData, Jan Wegelin.

Wegelin unpacks a central idea which reflects three constructs that speak to who and what South Africans are. These constructs are: National Pride, Active Citizenship and Social Cohesion. The three pillars are further complimented by eight Behavioural Expressions that capture what it means to be South African.

National Pride is directly tied to the South African identity which varies as far as the people who relate to it are concerned. The diverse view of this

is broken down into four clusters within the national pride construct. The first and proudest one is defined by the unwavering spirit of being South African. The pride is underpinned by Ubuntu, diversity, innovation and possibilities. This cluster is represented by 25% of the population who in all adverse situations, stand firm on their sense of national pride.

This cluster is followed by a more optimistic group of South Africans who believe in what the country has to offer to its citizens and those seeking to work, study, travel and invest in the country. This cluster's optimism is centered around the country's promotional attributes that have the potential of yielding great returns for South Africa holistically.

As the saying goes, 'the proof is in the pudding'. This is what the third cluster in this construct believes in. This is 12.6 million South Africans who take pride in social, political or economic achievements with a non-personalised view that's result driven.

Confronted by a myriad of challenges, the fourth cluster is made up of 22% of South Africans with a sense of concern to focus on things we can be proud of as a nation such as: beautiful natural places, sports, art, science and talent. They consciously choose to overlook our challenges and put a magnifying glass over the good things we have as a country.

The report further details the second construct which is Active Citizenship. According to Wegelin's findings, this is a practical expression of what it means to foster aid making use of available resources. The quality of which is measured in two ways: individual participation and the exercise of political, social and civil rights in line with the values of democracy.

It is known that traditionally, only affluent people took part in active citizenship as they had resources at their disposal. However, this has changed over time where we see South Africans from different walks of life making meaningful contributions in and around their communities. A great display of Ubuntu among our communities where the under resourced find ways in which to become resourceful.

This, as captured as the first cluster in this pillar, is a result of South Africans having a deep urge to be informed on their rights and the needs of their community. A mind-blowing shift of the masses seeking knowledge to build self-dependency as opposed to seeking it to protest or demonstrate as it was associated in yesteryears.

While some take matters into their own hands by making contributions in their communities, there remains a cluster that believes in practicing active citizenship at the ballot box. Patiently waiting to hold those in power accountable by voting. The coming 2024 elections are a perfect example of this cluster according to the report.

The third cluster has a total of 27% of South Africans participating in collaborative efforts with public services to foster functioning communities across the

country. Much like the first cluster, affluence is not a filter as most South Africans associate with this kind of active citizenship.

With social, criminal, political and community fragmentation and degradation- a large percentage of South Africans tend to only look out for themselves and their immediate groups. This unfortunately does not speak to what active citizenship means according to Wegelin's insights. This cluster is a result of failing service delivery and other bad elements such as crime and drug abuse.

The third and most complex construct of them all is Social Cohesion. Described as 'the degree of social integration and inclusion in communities and society at large, in the extent to which mutual solidarity finds expression among individuals and communities'. According to Jan Wegelin, this construct is divided between horizontal social cohesion (between people), and vertical social cohesion (between people and the state).

You will find that vertical social cohesion has evolved from the previous dispensation to the democracy we find ourselves in. Therefore, outlining the need for understanding as it relates to citizens of these two eras differently. This year, the report highlights the prevalent dependency of South Africans to the government in a post COVID-19 reality riddled with slow economic growth. The developing political tensions coupled with the high unemployment rate because of the pandemic has resulted in people being under immense pressure to get by and will result in people looking for some saving grace from the government.

The first cluster, however, reflects a duality of dependency where people show a dependency on government while others lean more towards their groups of familiarity. According to Wegelin, it shows a need for direction for our people as the strength of the vertical connection is accentuated with a sense of vulnerability.

Unlike the first cluster which has a level of confidence in government services, the second cluster depends on government in a different way. They do so through support mechanisms and interventions such as social grants and COVID relief funds that have to meet their day to day needs. According to insights, It is a very practical connection to government, relying on free education, public health, and financial support.



It is very interesting to note that horizontal social cohesion, which is among people as opposed to people in relation to authority and systems, has dropped to third place as the third most important cluster. According to Wegelin, it would be expected that horizontal social cohesion would be more important because that keeps the nation together. However, the salient score for this cluster is a low 3%. It demonstrates how much a leading role is needed to steer our people back to a point of engagement to source contributions that will put us in a much better position.

As if this is not enough, we have the so-called finger pointers in the fourth cluster. Those that stir up tensions by highlighting the obvious and not working together to form part of the solution. Although they sympathise with the disenfranchised masses of our nation, they have placed social cohesion as something that can never come from them. Based on the findings, this is the smallest of the four social cohesion clusters at 21% of the population. Furthermore, with a

salient score of only two percent, it is expected that this cluster would not contribute much to social cohesion.

Based on the efforts of building the nation brand on the abovementioned three pillars, we have to get a clear sense of where South Africans find themselves and their frame of mind in relation to these.

Research shows that from 2017 to 2021, South Africans have expressed themselves through ten behavioural clusters of groups. In the report, Wegelin explains that though 'the constructs have four clusters each, some started at seven clusters in 2017, it is evident that the concept of being a South African consolidated around specific themes. It is therefore no surprise that the 2023 results only identified eight behavioural clusters.'

Let us sum up each expression separately.

- 1. Proud character** supporters are loyal to the country in ways outside of the government structures and systems. They share a deep sense of appreciation of what it means to be South African.
- 2. Positive enablers** are the people who make it conducive for progress. They commit to improving circumstances and conditions for others in a positive way.
- 3. Uncritical loyalists** believe in the government structures such as the judicial system, health and governance. They need and believe in guidance.
- 4. Activist supporters** are largest group. A complex group that has been a part of the behavioural expressions since 2017. They have sympathy for those that do and empathise with those living in conditions where their only option is to protest.
- 5. Cautious optimists** have always been loyal to the country in the way that it has



been able to attract talent, investment and opportunities to help the economy grow as a preferred travel and tourism destination. Their commitment for the country is aimed at those looking in from the outside however, having an undefined appreciation of South Africa.

- 6. Proud democrats** made a noteworthy return to the behavioural group dynamics in 2021. They value the right to freedom of expression, to vote, to seek accountability to participate in society and the economy, to be part of what South Africans fought for in the years leading up to 1994. They advocate purely for a democratic society.
- 7. Politically discontented** group displays a sense of disenfranchisement and animosity towards South Africa's broader political structures.

Celebrators of achievement are characterised by their overt recognition of achievement by South Africa and South Africans on a wide range of attributes and features, including natural beauty, sport, science, innovation and success.

Lastly to round up the State of the Nation Report, is a Central Idea which is shared among South Africans. As outlined in the report, "South Africans value the freedom and democratic principles achieved through hard work, dedication, resilience and strength of character from all corners of the country. Despite many challenges, we look after one another in various ways with empathy, tolerance for our diverse backgrounds, appreciation for our cultures and heritage with a collective sense of being South African."

The report is a great body of work by Jan Wegelin, who in his brilliance, utilised and sourced cross referenced information that will give a credible outlook on our nation brand. We therefore would like to congratulate you for reading this report and staying abreast with what and who South Africa is both on a domestic and international scale.

INTRODUCTION

> CHAPTER 1

"A nation is a soul, a spiritual principle. Two things, which in truth are but one, constitute this soul or spiritual principle. One lies in the past, one in the present. One is the possession in common of a rich legacy of memories; the other is present-day consent, the desire to live together, the will to perpetuate the value of the heritage that one has received in an undivided form... The nation, like the individual, is the culmination of a long past of endeavours, sacrifice and devotion. Of all cults, that of the ancestors is the most legitimate, for the ancestors have made us what we are".

Homi K. Bhabha

South Africa is a social and political entity that exists at the confluence of history and geography with borders, urban regions and infrastructure determined by not only its current generation of inhabitants, but also those who lived through the contingencies of its precolonial, colonial and postcolonial eras. The human imprint on its topography reflects this history, resulting in a nation that is one of the most ethnically diverse.

It is in the promotion of the country, following nation brand theoretical principles, that Brand South Africa started to monitor the domestic, international and performance indicators of the country to develop the nation brand concept, or a central idea of who South Africans are or perceived to be. This is a critical point in the development of the nation brand concept.

Since the development of the Nation Brand concept in the late 1990s, the theoretical basis of what nation branding encompasses, has been contested. The main vantage points being economic and political gain

which steered nation branding into idealised images and constructs of national identity. The perceptions and values of citizenry gained, more recently, relevance and importance as theoretical foundations. This implied and necessitated a far more complex view of what nation branding is. Brand South Africa adopted the more comprehensive and yet complex route. Taking into consideration the complexity of the diverse South African nation as a given but also using that complexity to its advantage as the foundation of the central idea.

It would be fair to say that Brand South Africa challenged and embraced the importance of the views of citizens through one of its measurements, the Domestic Perceptions Research Programme (DPRP), to contribute meaningfully to the understanding of nation branding as a more holistic and all-encompassing concept to the marketing and academic fraternity, both locally and globally.

This book reflects on the state of the nation as illustrated through the DPRP, the International Perceptions

Survey and the performance indicators of the nation using the Productivity SA report. A triangulated view of the South African nation.

The foundation of the book, and hence the starting point is the DPRP, a powerful combination of three constructs; Social Cohesion, Active Citizenship and National Pride, complemented with Behavioural expressions or associations to what it means to be a South African, as a secondary layer.

In subsequent chapters the perceptions held by the international community will be compared to the domestic perceptions and finally closing off with the performance indicators over the past year.

The central idea reflects the confluence of a diverse and dynamic society based on these three pillars of information that triangulates the who and what South Africans are. Consider the following facts as key accolades of South Africa as a nation known for its diverse cultures and languages but also natural beauty as well as social and political achievements.

1

Route 62 is the world's longest wine route in the Western Cape.

2

South Africa hosts the second highest waterfall in the world, the Tugela Falls.

3

Johannesburg, with over 6 million trees, is considered the world's "Largest man-made forest".

4

Vilakazi Street in Soweto, Johannesburg, is the only street which can claim two Nobel Peace Prize winners; the late former President Nelson Mandela and the late Archbishop Desmond Tutu.

5

The Comrades Marathon, which started in 1921 to commemorate those killed in the first world war, is the world's oldest one day ultra-marathon.

6

Rooibos tea only grows in the Cederberg area in the Western Cape province.

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NATIONAL PRIDE AND
ACTIVE CITIZENSHIP

> CHAPTER 2

The quality of one's attitude toward your country in general as well as specific achievements which form the basis of its identity, describes a significant span of what national pride is. These attitudes may manifest as pride for a nation or as pride derived from the national identity.

Robben Island • South Africa

National pride is defined as 'the positive affective bond to specific national achievements and symbols' and can be operationalised simply as 'the degree to which one feels proud of his/her country'. National pride can be expressed as the attitudinal association to what the country represents to a South African and how these associations link with the South African identity or the concept of being South African. The more diverse the views, the more fragmented the national identity is.

During the past six years, national pride has consolidated from an initial seven clusters of association in 2017 to four, in 2023. The diverse perceptions consolidated. In the most recent assessment, done in November 2022, there are four clusters within the national pride construct.

The first construct is an exciting development in the cluster formations because it is motivated by the spirit of being South African, recognising diversity, innovation and the uniqueness of the country that is unmatched. That is the most comprehensive and all-encompassing expression of national pride, it has no specific focus areas, yet include broad associations such as Ubuntu, diversity, innovation, possibility, and a uniqueness that is unmatched. This is the most powerful expression of national pride to emerge out of the DPRP to date. This cluster represents 25% of the South African nation, or just over 10 million South Africans aged 16 years and older.

The salience score, which represents the strength of the cluster to represent the overall idea of national pride, is extremely high at 95%. In other words, from a

salience perspective, if all South Africans, not just 25%, could think about their country the way this cluster does, we'd be an extremely proud nation.

The other three clusters are more specific, focussing on specific attributes of what South Africa represents to the individuals that associate to these clusters. The second cluster reads: South Africa is recommended as a place to work, travel to, study or invest in. Although less specific, it remains optimistic and refers to specific promotional attributes about the country. This cluster has an outward focus of national pride, thinking about what the country means to those looking in from the outside. It is a reflection on the opportunity South Africa offers to those living here as well as those wanting to become part of the South African society in a particular way. Therefore, although more specific, this cluster remains optimistic.

The third cluster focusses on South

Africa's achievements whether socially, politically or economically with a local or international focus as a diverse nation. The association may be considered broad but the key difference being that it has, like the second cluster, an external association. It is not a personalised view of the country, it has not been internalised. This is why the cluster ranks in third place and as the largest group (30%, or 12.6million South Africans). The fact that national pride has an external focus also earns it a very low salience score as it promotes the country outwardly without recognising it internally.

The last cluster reads: South Africa is a place of great sport, art, science, talent and beautiful natural spaces. There are concerns but there are also proud moments. This is the first cluster with a sense of concern, a recognition of the challenges faced by the country and although these are there, very specific attributes create a sense of pride. With 22% of South Africans associating with this attribute, it is a large part of society. This cluster, although they recognise the challenges, try to avoid or look beyond these to identify the good things about the country – the weakest form of national pride. In their view the talent is here to do great, the opportunities are here to achieve the goals but it is in specific circumstances and looking beyond the challenges.

The four national pride clusters represent exactly the flow from first to forth one would like to see in any nation, the goal being to reduce the size of the latter three clusters.



1

Pride is motivated by the spirit of being South African: Ubuntu, diversity, innovation, possibility, and a uniqueness that is unmatched.

2

South Africa is recommended as a place to work, travel, study and invest. Although less specific, it remains optimistic.

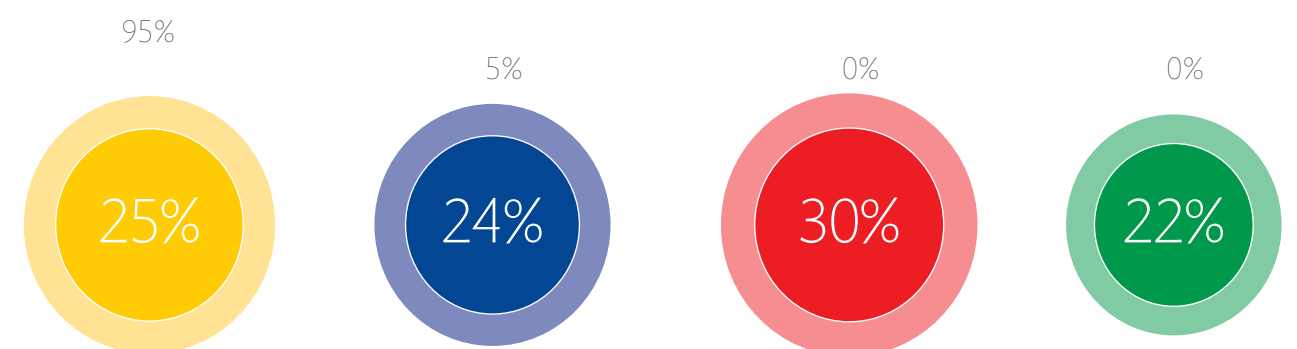
3

South Africa's achievements, socially, politically, and economically both locally and internationally as a diverse nation.

4

South Africa is a place of great sport, arts, and science talent with beautiful natural spaces. There are concerns but these are proud moments.

> NATIONAL PRIDE



> ACTIVE CITIZENSHIP

Active citizenship is a practical expression of what it means to care, to look after or to create opportunities to build something for others in communities or other social circles or areas to help improve circumstances utilising available resources. Traditionally, active citizenship used to be supported by the more affluent in society, having the resources to contribute. Over the years, this changed as South Africans became more involved in their communities at various fronts and intensity.

The second point, due to COVID-19, active citizenship became more concentrated to areas closest to where those offering help lives. In other words, helping in communities far away from their place of residence became more difficult due to social distancing and travel restrictions. The network of influence reduced to smaller areas, closer to home and with that the specific help offered. The fragmentation of active citizenship from the original operating models did not result in a lowering of intensity, in fact the opposite happened, it intensified the efforts.

The quality of active citizenship is measured in two ways, individual participation and the exercise of political, social and civil rights according to and in line with the values of democracy. Although there are numerous definitions of active citizenship, the one adopted for this programme is: participation in civil society, community and/or political life, characterised by mutual respect and nonviolence in accordance with human rights and democracy. The democratic significance of active citizenship is that 'neither democracy nor effective representation is possible until each participant devotes a measurable part of his or her life to furthering its existence'. South Africans responded to the developing trends over the last six years. Starting in 2017 with a conviction to help, this has matured to a positive and strong commitment for the benefit of the collective and independent from government.



Following the graph below, the order of the clusters expresses a similar and meaningful pattern to that seen in national pride. The first cluster is a positive and strong commitment to help others to improve circumstances as a collective. Standing strong on principles with limited government interaction. The cluster represents the precise nature of what active citizenship means or should be. Although it is the smallest group (20%), 1 in 5 South Africans, it has a salience score of 72%, meaning it represents a meaningful part of what active citizenship means. The reason why it is lower than the 95% seen in National Pride is because the right to vote represents a meaningful part of being an active citizen. It is about acting independently to make a change in the lives of people. One aspect that emerged this year, not seen before this programme started in 2017, is the strong principles

associated with knowing one's rights combined with knowledge about what is happening in the community as part of the first cluster. It is based on a self-generated need to be informed, to understand and to be able to help accordingly. In previous years, knowing one's right were associated with resistance, which protest. This year, knowing one's rights is used positively, to contribute, to be informed and to take appropriate action.

Similar to national pride, the second, third and fourth clusters fragment around specific areas of active citizenship, driven by specific needs. The second cluster reads: The right to vote is the most important action. Accountability, independence and social responsibility are activated and maintained at the ballot box. These are South Africans that express their active citizenship during elections.

As the second most important contributor, with a fairly high salience score, it is understandable in light of the 2024 national elections that this would be in the second place.

The third cluster, community activities, reads: Community activities are well planned and coordinated. Actions are taken against bad elements. Cooperation between communities, politicians and public services. Interesting to note that this cluster was in second place in 2021 following the July 2021 riots and looting event in parts of KwaZulu-Natal and Gauteng. Over the past year, this cluster refined into functioning communities where people make arrangements in collaboration with government representatives to improve conditions in the community. Similar operational arrangements have spread to other

provinces and areas but were mostly instigated by the riots and looting event. Some critics consider this cluster to be enclaves of more affluent communities that have the means to develop such initiatives, however, the evidence suggests it is far wider than just affluent communities with 27% of South Africans associating with this type of active citizenship.

The last cluster, community life is hard. Social, criminal, political and community fragmentation and degradation. Small groups protect and look after one another, represents the largest group at 30% and a salience score of 0%, meaning it does not contribute to what active citizenship means, or should mean. These are communities typified by the fading of rules and regulations, service delivery failures and the development of bad elements spearheaded by developing

trends associated with drugs and alcohol, crime and violence. In these communities, small groups form to look after one another and to protect their mutual interests. They often operate in isolated units to protect or prevent interference from the outside.

The active citizenship construct with its four clusters follows the same pattern as national pride with a very strong and general cluster at the top, and most importantly, followed by more specific areas of active citizenship driven by specific needs and circumstances. The final cluster also recognises the concerns and constraints of community life and what it takes to look after one another amidst many challenges and developments.

1

A positive and strong commitment to help others to improve circumstances as a collective. Standing strong on principles with limited government interaction.

2

The right to vote is the most important action. Accountability, independence and social responsibility are activated and maintained at the ballot box.

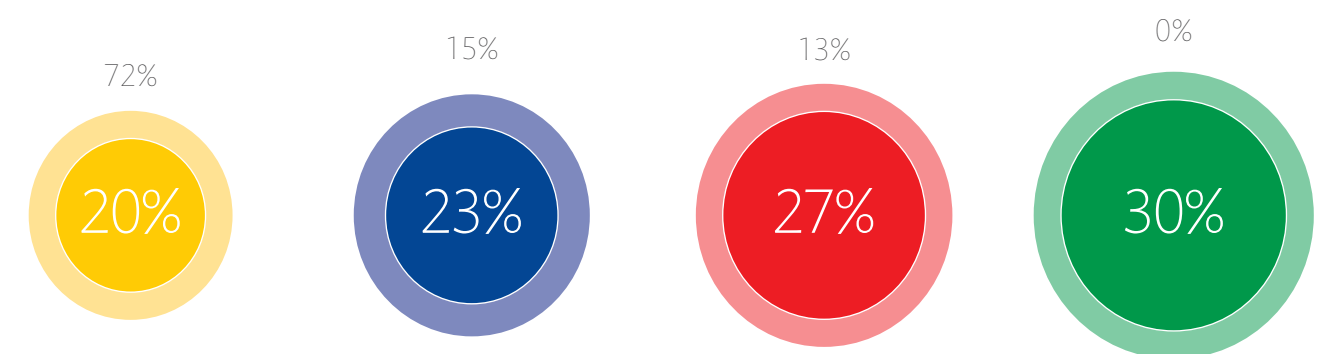
3

Community activities are well planned and coordinated. Actions are taken against bad elements. Cooperation between communities, politicians and public services.

4

Community life is hard. Social, criminal, political and community fragmentation and degradation. Small groups protect and look after one another.

> ACTIVE CITIZENSHIP



CHAPTER 3

SOCIAL COHESION

Of the three constructs, national pride, active citizenship and social cohesion, the latter is the most complex and takes the longest to change in response to circumstances and conditions.

Social cohesion varies between two outer ends, the individual or being individualistic against the other end a socially cohesive society where people collaborate and work together. The implication of this pendulum view relates to social capital. Social capital is the value attributed to the bonds between people, social networks, norms of reciprocity and trust.

Definitions of social cohesion are diverse, sometimes contradictory, and often lacking specificity. Despite this, for the purposes of this book, social cohesion is broadly identified as *'the extent to which people are co-operative, within and across group boundaries, without coercion or purely self-interested motivation'*. More specifically, it is *'the degree of social integration and inclusion in communities and society at large, in the extent to which mutual solidarity finds expression among individuals and communities'*. Social cohesion is further divided between horizontal social cohesion (between people), and vertical social cohesion (between people and the state).

Vertical social cohesion requires a deeper view to understand the implication on the construct itself. South Africa has always had a dominant government presence. Consider the type of society South Africa was prior to 1994 where most South Africans were forced to live in specific areas, perform certain jobs and were required to adhere to a wide range of rules and regulations. The government was the central authority that dictated how society should and must operate. In 1994, when South Africa became a democracy, it was critical for the new government to maintain that role as it led the nation from a dictatorial and authoritarian dispensation into a democracy. There was, and remains to some extent, a dependency on the government to guide and



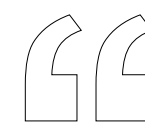
lead the nation into a new direction. Initiatives such as rainbow nation and miracle nation were emotive anchors people could identify with that opened being receptive and even tolerant toward one another.

This year, in the social cohesion construct analysis, the dependency on the government in a post-COVID-19 reality is evident as people navigate their way through a decade of slow economic growth and the many jobs that were lost as a result of the pandemic coupled with developing political tension. The more people find themselves under pressure, the more they will focus on a central guide to offer help and solutions to change their circumstances. The year 2023 is a particularly interesting point in the history of South Africa. There is a dependency on the government to provide solutions out of the economic situation. This is coupled with a growing lack of trust in the political system as political tensions between parties develop in the build up to the 2024 national elections.

The duality of the dependency is clearly evident in the social cohesion construct. The principle being, if people are not under economic, social or political pressure they are more likely to be tolerant of the differences

between people. On the flipside, the greater the pressure, the more people cluster together in groups that they are more familiar and likeminded with, so that they can relate to and express their concerns. The result of the latter means fragmentation of social cohesion into smaller groups, evidence of this was already noted in the 2020 and 2021 assessments mainly as a result of COVID-19. In 2022, with developing economic challenges and political uncertainty, the social fabric is beginning to fragment to the point where the dependency on government strengthens as the guide to lead the nation out of the current situation is growing.

With that in mind, the first cluster of the social cohesion construct reads: *Confident in government services, processes, and the political system. Recognising opportunities but may feel discriminated against.* It is important to note that the first, and most important cluster, has an element of concern as part of the cluster make up. Although this is the most salient cluster, it expresses the duality referred to earlier. That is an incredibly powerful expression of the need for direction. The strength of the vertical connection is accentuated with a sense of vulnerability. This is also the largest group at 30% of the population.



The year 2023 is a particularly interesting point in the history of South Africa.



The second cluster underpins the dependency on the state, but in a different way. Vertical social cohesion linked to public and social systems such as education, social security and health care. The cluster relies on the various forms of social support mechanisms such as grants and the COVID-19 relief fund. Again, a sense of feeling vulnerable is noted. The vertical social cohesion seen in this cluster is directly linked to a daily

need. This is different from the first cluster which has a level of confidence in government services. The second cluster is based on dependency with little evidence of a commitment towards horizontal social cohesion. It is a very practical connection to government, relying on free education, public health, and financial support.

When social cohesion was measured the first time in 2017, the horizontal

social cohesion attribute was the most important building block of the social cohesion construct. This year, it is in third place as the third most important cluster. The sense of feeling close to others, feeling that one belongs here and the willingness to embrace the diversity of South Africa. A connection between people rather than structures or systems. Areas where there is a sense of community, people are willing to engage to talk, share and solve problems. From a salience point of view, it would be expected that horizontal social cohesion would be more important because that keeps the nation together. However, the salient score for this cluster is a low 3%. It illustrates how critically important a leading role for the nation is at this stage. The ability to steer and guide the nation towards a space where there is a willingness to engage with one another and develop relationships to collectively build social and economic solutions.

The fourth cluster reads: *Aware of and often discuss inequality and the limited opportunities available to others.* These are the critics of the nation, the ones that blame, divide and share a sense of animosity towards government systems and structures but may also aim that towards private sector or other institutions. Although this cluster expresses a sense of sympathy for those who do not have or are unable to utilise the full potential of the economy or other activities, they contribute little in developing alternative solutions, support should come from somewhere else. Social cohesion is objectified to something outside of them, they look for help and guidance in places they cannot see or identify with. This is the smallest of the four social cohesion clusters at 21% of the population. Furthermore, with a salient score of only two percent, it is expected that this cluster would not contribute much to social cohesion.



1

Confident in government services, processes, and the political system. Recognising opportunities but may feel discriminated against.

2

Vertical cohesion linked to public and social systems and structures. Value education, social security, and healthcare.

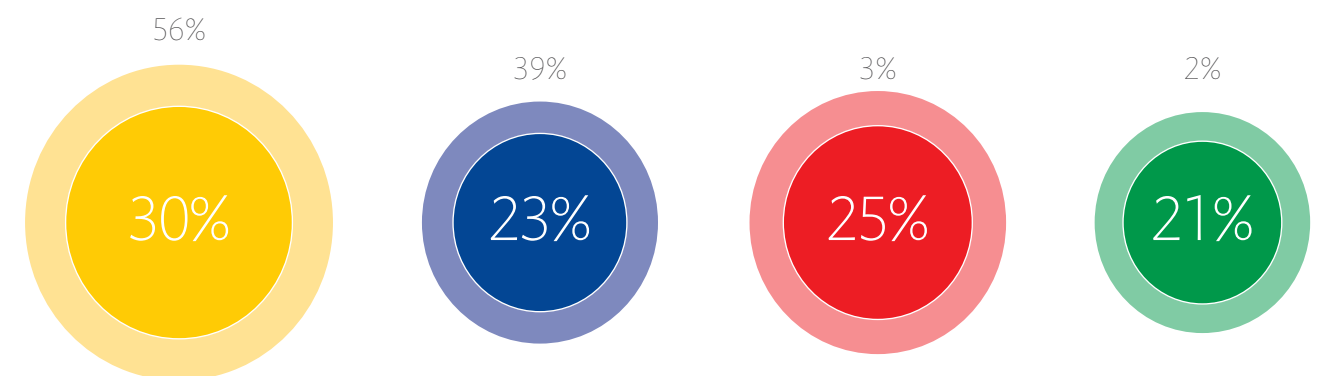
3

Horizontal cohesion, feeling close to others, a sense of belonging and embrace diversity. Social rather than structural connection.

4

Aware of and often discuss inequality and the limited opportunities available to others.

> SOCIAL COHESION





> BEHAVIOURAL EXPRESSIONS

In line with the development of a nation brand based on the three constructs or building blocks- National Pride, Active Citizenship and Social Cohesion, are very helpful to understand the mindsets of where South Africans find themselves.

However, what if these were combined to develop behavioural expressions? This is the next layer in the developing story of the South African nation. The behavioural expressions illustrate where the South African population coalesce around common views based on the three constructs.

From 2017 through to 2021, South Africans expressed themselves through ten behavioural clusters of groups. Across the years, most of these remained stable with the odd one disappearing and another filling its place. The more important finding was how these ranked from those behavioural expressions that are more important to building a nation through to those that least contribute to the character of the nation. In 2017, the behavioural expressions focussed on caring for one another in ways that were independent of the state, we called this group the Independent Humanists. Since 2021, the Independent Humanists are no longer part of the behavioural expression repertoire, other aspects have become more important.

As another example, the Proud Democrats remained a strong

character expression of the nation, believing in what was fought for in 1994 and appreciating the meaning of democracy. This group disappeared in 2020 when COVID-19 restrictions were the order of the day. They returned in 2021 and remain part of being South African to this day.

Considering that the three constructs have four clusters each, some started at seven clusters in 2017, it is evident that the concept of being a South African consolidated around specific themes. It is therefore no surprise that the 2023 results only identified eight behavioural clusters. These expressions describe social, behavioural and psychological formations in what it means to be a South African.

The characteristics of the behavioural expressions are unique, focussing on specific characteristics and traits as a combination of the three constructs. The behavioural expressions are not defined by each cluster, but rather are unique and coherent social formations with shared perceptions of the individual's relationship to the idea of being a South African.

We look at each expression separately.

Proud Character Supporters share a deep-seated appreciation for what it means to be South African. They value innovation, Ubuntu, diversity and democracy. They are loyal to the country in ways outside of government systems and structures. Their anchor lies in the characteristics of being a South African. The cheerleaders of the nation. They resemble traits of the original Independent Humanists but have taken on and adopted the character of being South African. They are no longer that independent but rather feel themselves as part of something bigger.

Positive Enablers remain committed to making South Africa a better place. Their involvement is characterised by a humanitarian outlook. Despite COVID-19, their commitment remains strong. This group has a strong representation of the active citizenship construct but are not just focussed on getting by or helping one another, they are enablers. They commit to improving circumstances and conditions for others in a positive way.

Uncritical Loyalists are loyal to government systems and structures. They are particularly pleased with the specific areas of government such as

the judicial system, education, health, law and order as well as the role of the governance check points such as the public protector. They are typified by their recognition of authority, respect for it, and their low level of activism. They support government, and perhaps political parties although they are not activists, and rely on the guidance and almost nurturing nature of the government as the custodian of maintaining a workable and functioning social, economic and political environment.

Activist Supporters are the largest group. This group has been part of the behavioural expressions since 2017. It is a complex group in the sense that they are not just activists, in fact many of them do not participate in activist actions. However, they have sympathy for those that do and empathise with those living in conditions where their only option is to protest. This group may sometimes feel discriminated against, experience inequality and could find themselves trapped in a cycle of dependence on government systems and yet wanting to be independent from a system that is not meeting their needs.

Cautious Optimists are probably the most stable behavioural expression. They have always remained loyal to the country in a way that values its ability to attract talent, offer investment opportunities and help the economy grow as a travel and tourism

destination. Although the anchors of association are less defined, they value what it means to be a South African and promote those qualities whenever and wherever they can. Their commitment to the country is aimed at the outside world with a weak or undefined internal appreciation for being South African.

Proud Democrats made a significant return to the behavioural group dynamics in 2021. This group values everything associated with democratic values. The right to freedom of expression, to vote, to seek accountability to participate in society and the economy, to be part of what South Africans fought for in the years leading up to 1994. They advocate for participation in their areas of interest, finding, enhancing and even endorsing their identity as being part of a democratic society.

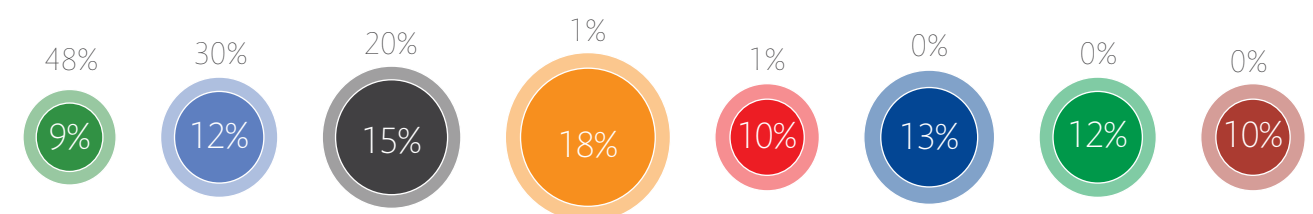
Politically Discontented was first identified in 2017 and then disappeared as a behavioural expression until this year. The similarities with 2017 and now is evident. In December 2017, the then president, Jacob Zuma, resigned. The developments leading to his resignation were characterised by political strife, frustration and protests. This year, there are similar political developments on the rise and particularly in the build-up to the national elections in 2024. This group displays a sense of disenfranchisement and animosity towards South Africa's broader political structures. They experience a sense of

discrimination and their perceptions of poor media objectivity and political discussion tend to confirm their disenfranchisement.

Celebrators of Achievement are characterised by their overt recognition of achievement by South Africa and South Africans on a wide range of attributes and features, including natural beauty, sport, science, innovation and success. This group praised the frontline heroes during COVID-19 and supported those that contribute in ways, however small to making South Africans proud. Although their commitment to the country is very focussed and based on specific events or attributes, they find meaning in it and feel part of society, even if just in the context of the achievement. As a result, they are in last place as the ability to feel part of being South African is dictated by external events, their commitment does not self-generate internally.

Considering the development of the national character from various angles, the final consolidated view of who South Africans are, is summarised into a central idea.

> BEHAVIOURAL GROUPS





THE CENTRAL IDEA

South Africans value the freedom and democratic principles achieved through hard work, dedication, resilience and strength of character from all corners of the country. Despite many challenges, we look after one another in various ways with empathy, tolerance for our diverse backgrounds, appreciation for our cultures and heritage with a collective sense of being South African. Motivated to sustain our inherit foundations of doing the right thing, we are committed to maintaining social and economic systems for the benefit of all, including those that may have lost feeling part of the most diverse country in the world!

Each sentence of the statement is deconstructed to illustrate the meaning and purpose for its inclusion.

South Africans value the freedom and democratic principles achieved through hard work, dedication, resilience and strength of character from all corners of the country.

The sentence starts with South Africans, the collective who voted 27 April 1994 in the first South African democratic election. The voter turnout was over 90% on the day. A peaceful day in which everyone committed to making a change. Those that fought for change either living in or in exile

contributed to the developing national perception that change is possible and can be achieved. With Nelson Mandela as the leader of the nation, the idea that change is happening and is possible became tangible and real.

Despite many challenges, we look after one another in various ways with empathy, tolerance for our diverse backgrounds, appreciation for our cultures and heritage with a collective sense of being South African.

Despite the challenges, and there is no point denying it, South Africans continue to contribute in various ways. Some

may only be able to put food on the table, others may promote for multi-million-dollar investments, the fact is each contribute to economic activity, exchange of goods and services to improve their own as well as the lives of others. The evidence of active citizenship, the collective sense of national pride are clear indicators of the deep appreciation for our diversity of cultures, languages, and landscapes that made us and continue to shape us as a South African nation.

Motivated to sustain our inherit foundations of doing the right thing, we are committed to maintaining social and economic systems for the benefit of all, including those that may have lost feeling part of the most diverse country in the world!

What was fought for in 1994 was doing the right thing. It was and strengthened the inherit foundation of what we continue to value as a nation. It is through that commitment that we debate,

discuss and seek solutions to maintain social and economic systems that will benefit everyone. There are those that have lost this view, the critics of the nation, the protestors, the unemployed and the disenfranchised, they need guidance and help to rekindle the original foundations or what it means to be part of the most diverse country in the world.



COMPETITIVENESS

> CHAPTER 4

Having looked at the domestic perceptions and these crystallise into eight behavioural expressions or identities of what it means to be a South African, in this chapter we shift the perspective to the international perspective where South Africa is ranked against 63 other countries to identify the key attributes that underpin the effectiveness and efficiency of the country.

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South Africa ranked 60th out of 63 countries, improving its position from 62nd in 2021.

The 2022 Productivity SA report highlights the key attributes of the country measured against a selected group of countries. The report, based on 346 criteria groups the competitive index into four clusters: Economic Performance, Government Efficiency, Business Efficiency and Infrastructure.

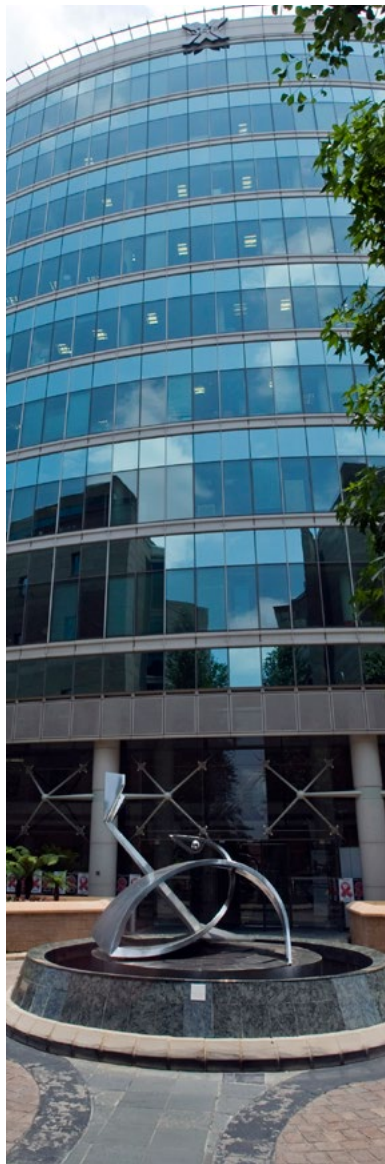
South Africa ranked 60th out of 63 countries, improving its position from 62nd in 2021. Key comparator countries, those forming the balance of the BRICS nations, are Brazil (59th), Russia (45th), India (37th) and China (17th). Outside of BRICS, Botswana ranked 58th in 2022, improving from 61st in 2021. The top five nations in the world are ranked from first to fifth based on the 2022 results, these are Denmark, Switzerland, Singapore, Sweden and Hong Kong.

Of course, one has to consider two factors in the ranking outcome. One is that most countries improved on the indices used in each of the four categories as economies recover from COVID-19. Those that recover quickly will improve their rankings, those that are slow, will slide toward the bottom-end of the ranking. South Africa improved on the index rank order, meaning recovery since COVID-19 is happening but that it is improving at a fair pace compared to other countries.

The economic performance improved from 61st in 2021 to 59th in 2022. This is based on six attributes of which only international trade and international investment improved significantly more than economic performance, domestic economy and employment. The one factor that negatively impacted the overall ranking is the increase in prices.

These indicators underpin the findings seen in the previous chapters, illustrating the economic pressure, increase in process and high unemployment adding to the almost over-reliance on government support and the need for direction from the country's leadership.

Comparatively, the strengths of South Africa remain cost of living, terms of



trade (ease of doing business), office rent, export partnerships and cost of fuel. The main aspect that negatively affects the reputation of the country is unemployment. Unemployment is based on measures such as youth unemployment, economic exclusion, and the low employment ratio compared to employability.

A country where economic trade is possible and with relatively low barriers to entry but with a large unemployment rate, the economic muscle of the country remains under-utilised, although the potential is significant.

Government Efficiency

Government efficiency improved the most of the four attributes from 61st in 2021 to 53rd in 2022. This was mainly driven by three attributes: government efficiency, tax policy and societal framework. The latter includes social grants and other support mechanisms. Public finance management, investment framework and business legislation remaining stable. These three relate to the economic policies and frameworks that have been called upon to change in order to generate greater economic activity.

These findings support the domestic perceptions where the need for support from government is accentuated, although the results of the current economic policies prevent a wider and more inclusive economic yield. Aspects that are considered strengths are no doubt the grant system and alongside that, press freedom to report and maintain a measure of accountability.

The aspects that negatively influence the government efficiency index are crime, violence, state ownership of economic activity (state owned enterprises), number of days to start a business, and lastly, corruption and bribery practices. These have eroded confidence in the government and created the duality spoken about

earlier, the reliance on government juxtaposed against the desire to be independent and self-sufficient. A position that created and probably will continue to create a sense of animosity as seen through the lens of the Politically Discontented behavioural expression group.

Business efficiency

This sub-index improved slightly from 58th to 56th. Two aspects that influenced the performance of business efficiency are access to finance and management practices. The latter being company agility, entrepreneurship, and willingness to support apprenticeship.

On the positive side is global trade platforms such as the Johannesburg Stock Exchange, management remuneration, working hours and women in entrepreneurship. Although there are many government and other business finance solutions, which is positive, the ability to access these finances are a significant barrier to advance business development with bureaucratic practices and policies.

Therefore, business efficiency, productivity and utilisation of the labour market remained stable. Despite these challenges, the overall attitudes and practices of the business fraternity remain positive and optimistic, navigating through these challenges are not for the faint hearted.

The private sector remains a positive contributor to the level of confidence maintained in the overall reputation of South Africa with many accolades of innovativeness, solving real business problems and the ability to find opportunities to grow.

Infrastructure

The last of the four sub-indices, infrastructure, remained stable at 61st in 2021 to 60th in 2022. The main strength associated with the South African infrastructure is

education. However, this should be considered with the support mechanisms such as NSFAS and other measures to financially support those seeking to study. Conversely, pupil-teacher ratios, human development and higher education achievement are key weaknesses in the education system.

While remaining stable between 2021 and 2022, various forms of infrastructure such as basic, technological, scientific, health and environment form the foundations upon which the above three sub-indices perform. One would expect to see a change in the development of infrastructure to be the instigator of positive change in the three above.

The great need for effective and efficient service delivery including maintenance of systems were noted in the domestic perceptions results. The behavioural expression, Activist Supporters are a key indicator of the limited infrastructure maintenance programmes that allow for further development initiatives.

Conclusion

The competitiveness results for South Africa, underpin the findings from the domestic perceptions research in more ways than one. As complex as a nation is with all its systems and processes to navigate a nation through daily administrative tasks whilst creating the opportunities for businesses and people to grow and develop, so did the complexity of people and how they find meaning in being a South African connect on different levels about what are strengths and weaknesses about South Africa.

There is not one or two things that find meaning, it is a collective with various levels of intensity and relevance that constitute that feeling of pride, commitment, and social integration.

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The competitiveness results for South Africa, underpin the findings from the domestic perceptions research in more ways than one.

GLOBAL REPUTATION

CHAPTER 5

As the last part of building the perspective on the South African brand, it is necessary to review the international perceptions. The domestic perceptions were complimented with the reputation analysis data. So, how does the international perceptions contribute to the South African brand image?

The Global Reputation Study monitors the South African brand based on five broad indicators: tourism, investment, attracting talent, prominence, and exports. Each of these are measured against key indicators from participants with additional metrics based on the number of internet searches for specific topics related to South Africa compared with previous performances.

The study measures South Africa from key attraction markets: United Kingdom, United States, Germany, France, China, Japan, India, Switzerland, United Arab Emirates and Saudi Arabia with competitor markets such as Nigeria, Egypt, Vietnam, Thailand, Turkey, Chile and Brazil.

South Africa continues to be one of the most sophisticated and promising emerging markets globally. During 2021, 45% of participants agreed that their perception of South Africa improved against only 3%, stating that it worsened. The country remains one of the top 5 places to invest, to do business in or to relocate to.

A key differentiator is familiarity. Those that are familiar with South Africa, its circumstances and conditions, rate the country much higher than those that are not. The familiarity factor is a key attribute to invest in. Improvement of perceptions will lift South Africa's appeal by up to 5% of people willing to interact with the country if the perception of the country improves by only a factor of 0.1. An ideal ratio-gain to improve the perception for a significant yield.

Once familiar, ratings such as outstanding and ratings as one of the top three alongside United Kingdom and the United Arab Emirates as an investment opportunity, are familiar research results. The country is the second preferred destination to attract foreign talent along with the United Arab Emirates and ahead of Thailand and Brazil. Up to 75% of tourists would love to visit South Africa. Nevertheless, tourism demand for South Africa is still lower compared to pre-pandemic levels. Tourists are attracted to the diverse natural environment, wildlife, culture and climate.

Perceptions are formed or changed either through experience or influence. These could be driven by a myriad of content and narratives that surround the country. South Africa is perceived positively from the experience perspective, especially as a place to do business with and buy products and as a place to invest. The attractiveness of the "rainbow nation" still remains relevant and is associated with culture, people, and history.



Naturally, a country is a constellation of many different things, not purely good or bad. Thus, South Africa is associated mainly with its diverse nature, wildlife and culture, but also with safety issues and Apartheid.

In terms of internet searches, international citizens searched over 10,4 million times about South Africa in 2021. While the number of searches is lower than in many other countries, the interest in South Africa surged among all audiences in the same year. For instance, workers from Germany increased interest in South Africa in 2021, and there was a boom in tourism interest from Saudi Arabia as well.

Tourism

Top South African tourism related brand-tags in 2021 included animal watching (over 412 thousand searches), with South African restaurants being searched for over 253 thousand times and national wonders appearing in around 216 thousand of South African tourism related searches.

The country remains top-of mind in relation to tourism, with wildlife a top-of-mind perception of 13% of the individuals surveyed, followed by Nelson Mandela (9%), as well as Nature and Safari, which were both rated as top-of-mind by 7% of individuals. Significantly in this regard is the continued salience of former President Mandela and his legacy, which till today influences people's views.

The majority of the respondents that wouldn't visit South Africa are concerned with safety and crime (66%), confirming the importance of familiarity. Only around 17% of the 2 000 participants in the study were familiar with the country, lower than comparative nations such as Egypt and Turkey.

Investment

Investment sentiments are influenced by factors such as economic performance, fiscal policy, unemployment rate, political stability, and infrastructure. Unemployment remains the top influencer. Despite these results, 59% would consider South Africa as an investment destination and 76% would do business with South African firms.

Positive attributes include low operating costs, incentives for investors, and



entrepreneurial activity. Natural resources and agriculture were seen as the country's main sectors.

Talent

Over 400 thousand searches on South Africa as a possible destination for studying was seen in 2021, with around 750 thousand searches in relation to work opportunities.

Prominence

The overall perception of South Africa improved during 2021. Instabilities and Covid-19 concerns did not have a major impact on the South African brand. Only 3% of respondents reported that their perception of the country worsened.

Some attributes saw double digit increases in positive perceptions

during the 2021 period. Exports were up by 44%, the investment environment improved by 42%, tourism by 35% and talent attraction by 40%.

Sport continues to play a critical role in promoting the country followed by culture, people and history.

Exports

Over 76% of surveyed individuals expressed interest in purchasing South African products.

Conclusion

The international perception study highlights core aspects of the country that align with domestic perceptions. These include our diversity, rich heritage, natural beauty and legacy, particularly the legacy of the late Nelson Mandela. The Cautious Optimists

behavioural expression cluster has a point, recognising similar attributes as the international participants. Although these are considered vague attributes, some identified these as key tags to promote the country.

As South Africans, we are familiar with local market conditions and sometimes consider these critically, stating that we've just become complacent. Reality is we should guard against it. However, from an international perspective, once someone is familiar with the South African market conditions, their perception of the country improves significantly. Perhaps we'll review what we consider to be complacency the more we become familiar with conditions in other countries.

CONCLUSION

> CHAPTER 6

This report reflects on the highlights of South Africa's journey towards its nation brand development. The most recent assessment confirms two things. One, South Africans are not passive recipients of changing and challenging circumstances. It is a dynamic and responsive, yet diverse nation that acts and reacts to the influencers that shape the nation. Two, the impact of COVID-19 and its consequences resulted in many challenges such as higher unemployment, fragmented political discourse and frequent reports of the failing of struggling provision of services, most notably electricity. The evidence in this book shows that despite these challenges, South Africa did not give up. In fact, the opposite happened.

The three constructs: National Pride, Active Citizenship and Social Cohesion all show an increase in the nature of or development trend of the constructs. A consolidation of views that strengthened during the past year are stronger than a year ago.

The first, and most salient attribute of national pride illustrates the strengthening of an internal conviction about why being a South African is not just important but worth the effort to make it a place one is proud of. There is an underlying spirit that encapsulates the concept of being a South African, appreciating its diversity, innovativeness and possibilities that make it a unique nation.

Similarly, Active Citizenship, the outward commitment to help those in need. The practical expression of the conviction that everyone in the area of influence is important. In this year's assessment, active citizenship strengthened internally, in other words even though the expression of active citizenship is aimed at others in need of help, it is the motivation and foundation of why that is important that strengthened. This is a critical turning point in that it is not just altruistic but with the fundamental conviction that it is also important and therefore, irrespective of government action or inaction, should be protected and maintained for the benefit of those in need.

The third construct, social cohesion, also the most complex, illustrates a nation in need of guidance. The important role of the state to guide the nation out of the previous dispensation into democracy is unquestioned. However, the state is not the nation, it is but one of the pillars upon which the nation as a collective finds meaning in its own character. The social cohesion construct illustrates this dynamic as a changing fluctuation between needing the state to guide the nation out of slow economic growth, criminal activities and disenfranchisement from the collective South African identity. There are those that have disengaged with the state and are focussing on developing their own paths, there are those that have no option but to hang on to the state for survival through grants and other support mechanisms and there are those that find meaning among one another as fellow South Africans to endorse and maintain the meaning of the collective.



Social cohesion is always the last, and slowest, to change of the three constructs as it is so fundamentally embedded. The signs are clear that the principles upon which the relationship with the state is based, is being challenged.

All three constructs illustrate the dynamics between the nation and the state. This should not be seen as a relationship based on strife or animosity, even though there is evidence of it. It should rather be seen as the principle of democracy, a nation ruled by the people. The results of this exploration clearly point toward a nation beginning to carve out its own identity and therefore as an independent contributor to what it means to be South African, can rule itself as a democracy. Acknowledging the role of the state, but not completely dependent on it.

With these three constructs in place, the next layer in the development journey is the behavioural expressions. These are indicators of the complex nature of a national identity not based on stereotypes or slogans but on real data-driven characteristics. The first two behavioural expressions, the Proud Character Supporters and Positive Enablers picks up on the national pride and active citizenship constructs to find meaning in endorsing what South Africa is about, our character, and to help those who have lost their way along the journey of life and enable them to come back and contribute in meaningful ways. These two are similar to what happens in families, at the workplace, in communities and ultimately, as is the case here, a nation. Those that help and guide others to stay on course, to see the bigger picture and to endorse the ethos of the collective. The fact that these two are most important descriptions of the nation is a very good indicator of its strength.

The third and fourth behavioural expressions: the Uncritical Loyalists and the Activist Supporters illustrate the duality of the relationship with the state as seen in the social cohesion construct. The loyalists hang on to the pivotal role of the state, endorsing



their guidance and decisions without question. The activists express their frustration with the systems and structures of the state that neglected these parts of society through service delivery issues, exclusion from economic participation or feeling ignored by the leadership structures in place. Irrespective of the motivations, there are concerns and these are channelled to the state.

The Cautious Optimists and Proud Democrats value broad principles that are in place and use these as anchors to find meaning in the role as South Africans. There is a level of detachment noted in the descriptions of these behavioural expressions, the focus areas are outwardly motivated and objectified.

Similarly, the Politically Discontented and Celebrators of Achievement also share the outwardly focussed or objectified nature of being South African, but these are based on people and/or events that provide the basis for the feelings either as proud or discontented. The last four behavioural expressions are more fragmented in the areas they rely on to provide input into the discourse of what it means to be a South African, and hence they are at the bottom of the ranking as meaningful contributors to the overall character description of the nation.

If one were to squeeze these eight behavioural expressions into a

consolidated view, taking into account their rankings, it will distil into what was called the Central Idea. The fundamental principle upon which the nation stands. The central idea is:

South Africans value the freedom and democratic principles achieved through hard work, dedication, resilience and strength of character from all corners of the country. Despite many challenges, we look after one another in various ways with empathy, tolerance for our diverse backgrounds, appreciation for our cultures and heritage with a collective sense of being South African. Motivated to sustain our inherent foundations of doing the right thing, we are committed to maintaining social and economic systems for the benefit of all, including those that may have lost feeling part of the most diverse country in the world!

An overall expression that started with the three constructs, consolidated those into the eight behavioural expressions and finally refined those into a single paragraph to communicate the foundation, the central idea of the South African character, who we are as a nation. Expressed differently – A nation finding its brand.

In the last part of the book, the lens

shifts to the global or international audience to understand how South Africa is viewed from the outside. The first, the competitiveness view illustrates and confirms that there are challenges. South Africa is ranked at the bottom end of the index. However, the country also shows that there has been good recovery since COVID-19 as the rankings improved. Key attributes are tourism, exports, and the ease of doing business. This is complemented with the global reputation survey where many participants around the world are asked to provide insight into South Africa as a country. The key finding is that those who know a little about the country can see through the veneer of media reports and recognise, as is illustrated in this book, that South Africans are not just passive recipients of challenging circumstances. We, like them, want to engage, want to trade, invest and grow. We even have the added advantage of beautiful natural landscapes and diversity, many cultures and languages, interesting and world-renowned places of interest and a coastline around the southern tip of the continent. An interesting place many would like to visit.

South Africans are, despite where we find ourselves on this journey, not easily pushed aside. We value what was fought for, we believe in doing the right thing, we respect and value our diversity. We are a nation that is beginning to find its brand. many would like to visit.

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BRAND *South Africa*



Inspiring new ways