

STATE OF THE NATION BRAND REPORT

Brand South Africa Series:

The story of the South African nation finding its brand

Episode 1: A changing and responsive national identity

1. Introduction

This is the story of Brand South Africa's (BSA) nation brand monitoring research programme, the Domestic Perceptions Research Programme. The story is fact-based and illustrates the influencers and change agents of a nation's view of itself – what it means to be South African. The story is narrated using data from more than 30 000 interviews, conducted over five years.

BSA, the custodian of the South African nation brand, is working with African Response and MarkData, their joint venture research partners to develop this historic work as a reflection on the South African nation brand.

2. Context of the study and introduction to the behavioural group segments

Nation Branding as a novel discipline in the broader marketing field. It includes marketing, branding and strategy (Vuignier, 2016). These three concepts share a similar goal: to differentiate a nation. Three factors influence nation branding: economics, politics, and citizenry.

Nation brands, like product, service, or corporate brands, have value (Feldwick 2002). Products or services offered account for an estimated 30% to 40% of any brand's value. The identity and personality, enriched with emotional and rational attributes derived from aspirations, attitudes and behavioural expressions represent the balance, that is, the soft power attributes.

Simon Anholt, the father of nation branding, typifies nation brand management as “the cautious and slow-moving husbandry of existing perceptions.” (Anholt 2018, p. 232).

Nations have no choice but to brand. Wealth is created primarily through the value added by nation brands as an expression of what is offered. Competition has evolved to an indisputable rule of global capitalism (Anholt 2002). Given the potential wealth gains amidst global capitalism, it is considered a mistake not to brand a nation (Urry 1995). Investing in a nation brand has the aim, like investment in any brand, to create wealth (Chatterjee 2016).

Although the global pool of research on the ideal development of a nation brand is shallow, BSA and its research partners developed the nation brand composite based on three constructs: National Pride, Social Cohesion, and Active Citizenship.

2.1 National Pride

“National pride of an individual is a kind of favourable attitude toward one’s country in general, toward its specific achievements, and toward one’s national identity”¹

National Pride can be derived from various sources, including economic, social, political, and cultural achievements as well as from history. It can consist of nationalistic and patriotic sentiments (Latcheva, 2010). These sentiments are specific forms of an individual’s positive evaluation of a nation and are a consequence of attachment to a nation (national identity).

2.2 Social Cohesion

Social Cohesion is a complex concept that emerged out of the literature on social capital. Many definitions are based on the principle that social capital and (in)equality are components of social cohesion. In this document, the South African Department of Arts and Culture definition of social cohesion applies:

“...the degree of social integration and inclusion in communities and society at large, and the extent to which mutual solidarity finds expression among individuals and communities.”²

In terms of this definition, a community or society is cohesive to the extent that the inequalities, exclusions, and disparities based on ethnicity, gender, class, nationality, age, or disability (or any other distinctions which engender divisions, distrust, and conflict) are reduced and/or eliminated in a planned and sustained manner.³

Social Cohesion includes, for example, different spheres of human life, and several types of social relations, including relations among individuals, between individuals and groups, and between individuals and society. Social cohesion refers to trust and solidarity among community members. Cagney *et al.* (2016) state that collective efficacy and social exchange are the key determinants of a community’s capacity to manage problems or implement shared goals. Collective efficacy expands on the basic concepts of social networks and social capital and emphasises the importance of mutual trust and expectations of action in service to collective goals.⁴

2.3 Active Citizenship

“Active citizenship means people getting involved in their local communities and democracy at all levels, from towns to cities to nationwide activities. Active citizenship can be as small as a campaign to clean up your street or as big as educating young people about democratic values, skills and participation. Active citizenship is one of the most important steps towards healthy societies especially in new democracies.”⁵

Active Citizenship is not something a community or individuals have or acquire. It is a process, and a developmental, iterative construct that shifts and changes in line with needs, achievements, and the coordinated variability of a changing social dynamic, effective state delivery systems, and mutual understanding in communities.

¹ Smith & Kim, 2006 in Marharyta Fabrykant, Vladimir Magun 2015

² Authors’ emphasis

³ Fair treatment of groups low on online questions and SASAS survey

⁴ Bernard, 1999; Chan & Chan, 2006; Garroway & Jütting, 2011

⁵ Nosko and Szegez, 2013

Active Citizenship is the practical outflow of believing in making a difference. It is often linked to independent thinking and a capable state. These two dimensions are themselves interlinked, with independent thinking described as horizontal (between citizens, in a community and for the purpose of building the community) and a capable state as vertical (between citizens and government where the main aim is to ensure accountability) active citizenship. The interaction between these dimensions underpins the potential for positive development and growth.

Protest action is an expression of frustration with a lack of accountability and although seen as a form of Active Citizenship, it remains an expression of the needs of a community. The above definition encompasses several levels of the complex nature of Active Citizenship.

3. Study methodology and credentials

The three constructs were developed and tested as building blocks within the South African context. Finally, a set of 95 statements represented National Pride (37 statements), Social Cohesion (29 statements) and Active Citizenship (29 statements).

The development of the behavioural groups was described in the accredited *Politikon Journal*⁶ following a detailed and peer-reviewed statistical process. The study was also presented at the Southern African Marketing Research Association (SAMRA) Annual Conference in 2018 where it won Best Overall Paper and the Kantar Innovation Award.⁷

*Behaviour is a composite expression of the three constructs that interlink and interchange in importance and relevance for individuals living in different social, economic and political circumstances.*⁸

The BSA Domestic Perceptions Research Programme expresses the nation's sentiment as a characterisation of being South African using ten behavioural groups. The ten groups emerged as a statistically relevant and meaningful expression of behavioural clusters.

Nations that are less diverse than South Africa may have fewer behavioural clusters, and nations with well-established democratic societies may have fewer behavioural expressions of what the national identity or brand identity of the nation is. South Africans have, over the past five years, expressed their sentiment of what it means to be South African in ten different and changing ways.

4. Reflecting on the development of the nation's brand

Two criteria are used for the statistical development of the behavioural groups:

- **Saliency:** The higher the saliency of a behavioural group, the more attention it attracts and the more important it is as an expression of what it means to be South African. The behavioural groups are ranked based on saliency, with some being more important expressions of the character of the nation, at a point in time.
- **Size:** The size of a behavioural group reflects the number of South Africans who associate with the characteristics and expressions of that behavioural group. Since the study is

⁶ <https://www.tandfonline.com/doi/full/10.1080/02589346.2020.1715048>

⁷ <https://brandsouthafrica.com/brand-south-africas-domestic-perceptions-research-wins-two-awards-southern-african-market-research-association-samra/>

⁸ Author's definition

representative of the South African population, the size of each group is also the actual number of people in South Africa aged 16 years and older that belong to the group.

As expected, the size and salience of the behavioural groups changed over the years. Some groups disappeared from one year to the next, new groups developed and others shifted in size or up or down the salience scale over time.

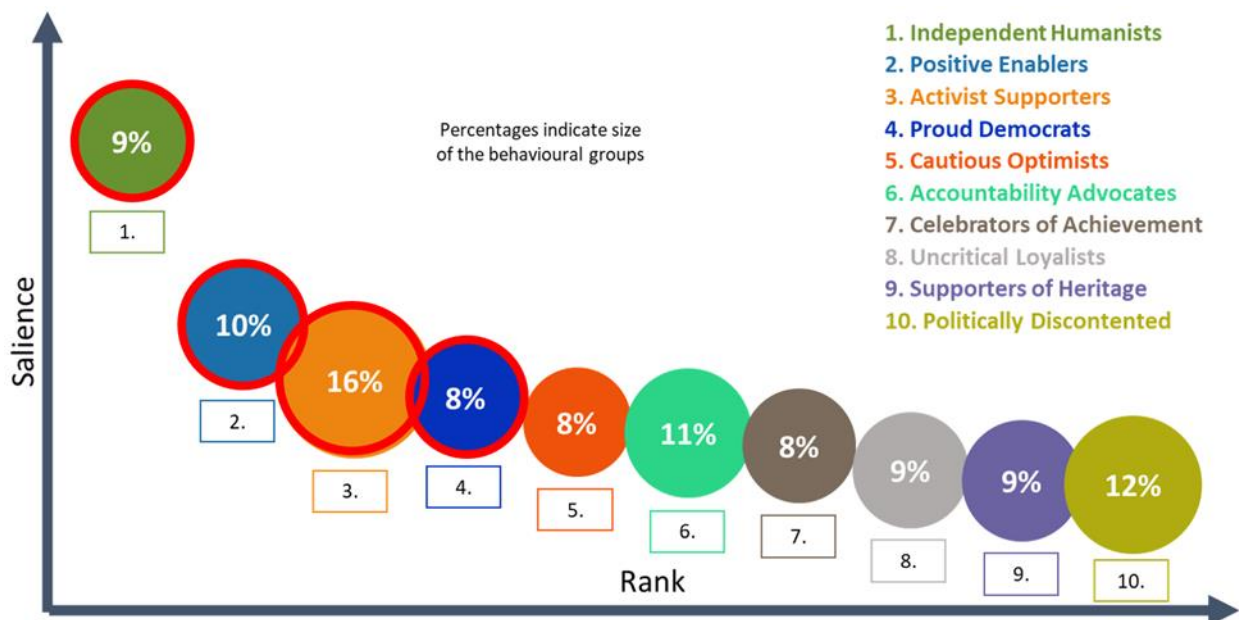
Why do the behavioural groups change? What are the drivers of change? This story is about the high-level interpretation of the drivers of change and how the character of the South African nation continues to emerge. It is important to recognise and support this when building a national identity.

5. The chronological change of the South African nation brand

The past five years shed light on the impact of major events on the South African nation and illustrate the changes in perceptions of what it means to be South African. The survey data used in the analysis are primarily based on an annual nationally representative survey sample of 2 500. The survey was conducted in October/November every year to minimise the effect of external factors such as seasonality (especially in the agriculture sector), and public holidays.

5.1. 2017 – The benchmark year

A few weeks before Jacob Zuma stepped down as President of South Africa, the first survey was conducted. This was at a time when the nation was aware of the political circumstances to some extent and knew about state capture and corruption. However, as the results show, the nation was unaware of the extent and severity of such issues. Therefore the 2017 data is a good benchmark of the nation brand.



The first four behavioural groups (circled in red) are altruistic, but each have a different focus. For instance, **Independent Humanists** have a network of people they care deeply about, and they support each other in whatever way is needed. This network could be, but is not always, a group of friends, but not always. The group appreciates the diversity of South Africa but has little interest in politics and avoids political debates, finding these unhelpful and limiting.

Positive Enablers are the community engagers whose core values align very well with what it means to be an active citizen. This group is involved in their own or other communities or support programmes. One in ten South Africans are members of this group.

Activist Supporters are the pressure groups of the nation. They rely on collective protest action or encourage others to stand up for their rights, to keep government accountable for services not delivered. Their interest is in the collective improvement of conditions. Some members of the group do not participate in protest actions or other forms of voicing their concern, but they understand and passively support those who act.

Proud Democrats value the meaning of freedom and being able to express themselves as South Africans. They see this as a basic democratic right, which includes the ability to vote and to participate in elections, freely and fairly.

Cautious Optimists, Accountability Advocates and **Celebrators of Achievement** value specific aspects of being South African. **Cautious Optimists** value the country as a global player that has merit to invest, work or travel in. **Accountability Advocates** focus on their own role in society and what they can offer but have little concern for others. They have a “you do what you must do, and I’ll do what I need to do” stance. **Celebrators of Achievement** are focussed on sport, science, and arts as expressions of pride to be South African.

Uncritical Loyalists and **Supporters of Heritage** support government actions, and the ruling ANC for liberating the country. They accept and trust the government’s plans and actions for steering the country, based on historical performance.

Lastly, the existence of the **Politically Discontented** group is a sign of disillusionment with the political environment. This group has a historically sceptic view that sustains and strengthens in the face of signs of corruption and mismanagement, when reported in the media and elsewhere.

In 2017 the nation was committed to making South Africa a better place for all. The higher salience scores of the first four groups expressed the dominant characteristics of the state of the nation and what the brand identity of South Africa looked like.

5.2. 2018 – The great realisation

Two factors characterised 2018. First, entrenched practices of corruption and mismanagement were uncovered. The State Capture Commission, the South African Revenue Service (SARS) Commission, the Public Investment Corporation (PIC) Commission and the National Prosecuting Authority (NPA) Commission are examples of investigations into the depth and extent of corruption.

Second, President Cyril Ramaphosa took a resolute stance to restore order, and return to ethical conduct and improved service delivery, promising a “New Dawn.” President Ramaphosa’s ratings soared amidst the disillusionment and frustration of the nation.

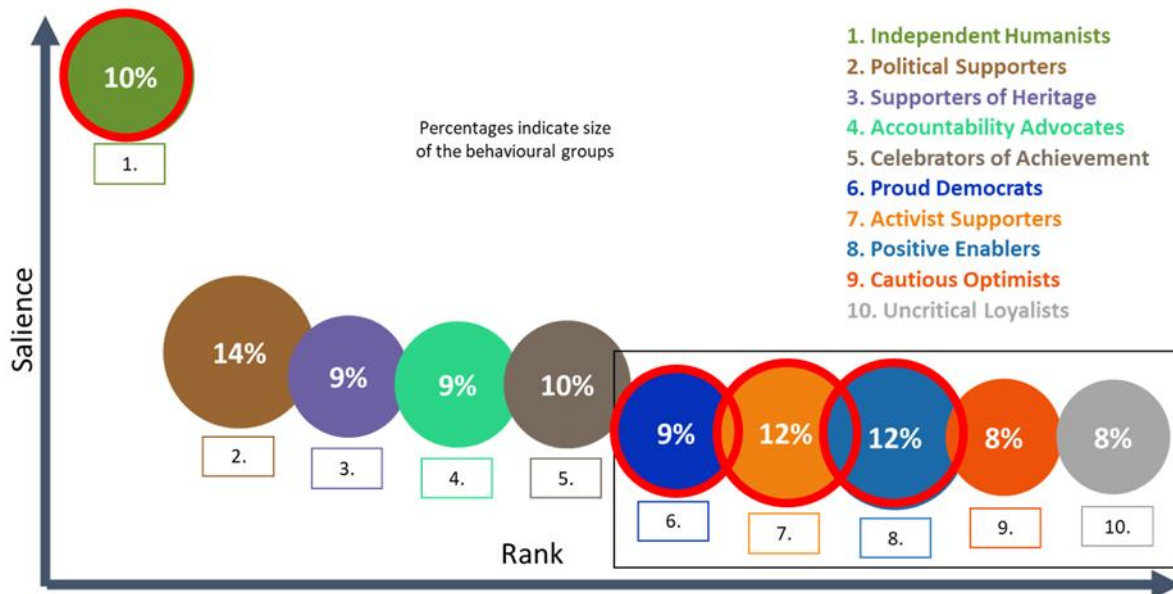
Many realised that the political leadership did not value the nation’s newfound, hard-fought freedom equally. There were also those that supported Jacob Zuma and continued to do so.

Did we see these sentiments in the behavioural groups?

The **Independent Humanists** retained their position as the group most aligned to what it means to be South African. However, this group was now isolated. The other altruistic groups (circled in red) had shifted to the back of the rankings. These groups no longer represented what it means to be

South African. The groups that are more focussed on the interests of the individual or whose sense of identity is driven by specific factors became more important illustrations of a national identity.

Some abandoned their **Uncritical Loyalists** views and joined a new group, the **Political Supporters**. This group believes the government is trying to do the right thing. However, instead of being uncritical they have a sceptic and watchful eye on the government. The **Political Supporters** still defend the government in general conversation but may have privately held doubts.



The nation had lost trust in government and in each other. Trust in the ability to engage with one another, and therefore, willingness to support one another, deteriorated. Lower levels of appreciation were evident, and therefore, people were less willing to commit to improve the country and make it a better place for all. Those that helped in communities (**Positive Enablers**) withdrew and focussed on areas closer to where they lived or channelled their efforts through the church or other organisations. Although the group increased slightly in size, they became more selective about who to help. The **Proud Democrats** moved from fourth to sixth place in the salience rating.

In 2018, the miracle nation of just over two decades ago received a blow when people realised not everyone, and especially the political leadership, was equally committed to building the nation.

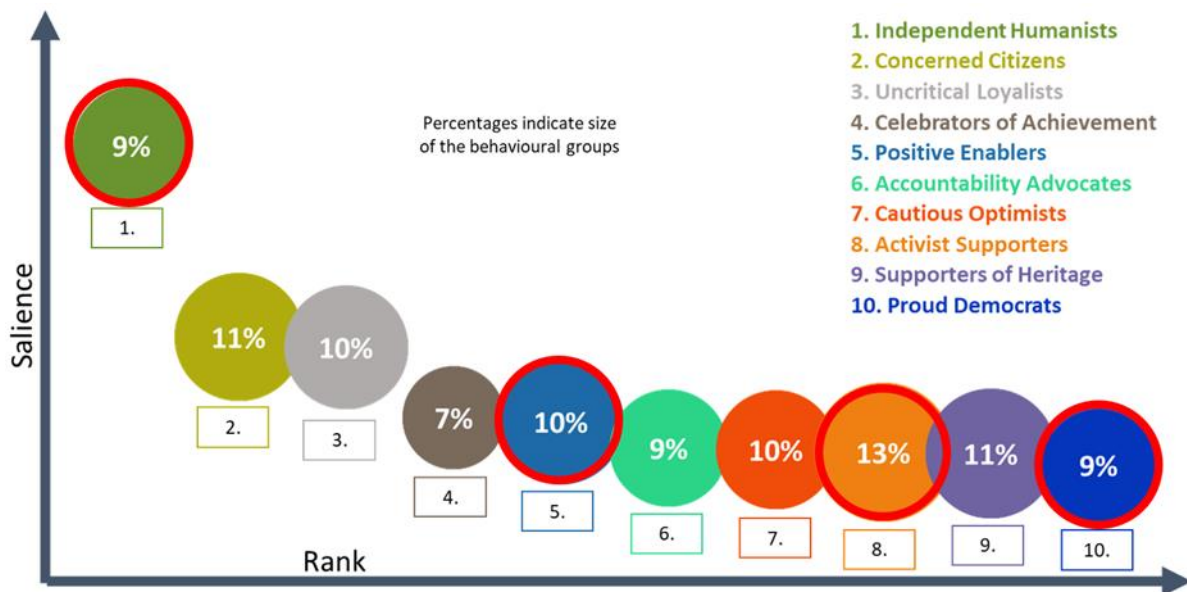
5.3. 2019 – Stumble and fall

In October/November 2019, a few weeks before the first reports about a deadly virus emerged out of China, the third survey was conducted. At the time, the nation had started to make sense of what had happened, amidst continued media reports of corruption and mismanagement.

The first national election under President Cyril Ramaphosa’s leadership took place on 8 May with a record number of 48 political parties registered on the ballot paper. The ANC won 57.5% of the vote, the DA placed second with 20.8% and the EFF placed third with 10.8%. Three major events shaped the lead-up to the elections: the Durban xenophobic riots in March, national service delivery protests in Alexandra and Tshwane in April, and the apparent involvement of Russia in the election process, denied by the Russian Embassy.

South Africans were beginning to make sense of the new order of things but needed help. Apart from the **Independent Humanists** still at the top of the rankings, the next two groups tell the story in detail.

The **Concerned Citizens** and the **Uncritical Loyalists** shared a salience score slightly higher than the rest of the behavioural groups. These two groups have distinct characteristics. On the one hand, the **Concerned Citizens** support the government of the day but are concerned about its ability to fulfil its mandate, to provide the necessary services, and to enable communities to improve. On the other hand, **Uncritical Loyalists** support the government unconditionally. This group waits for the government to give them direction, to help them take the next step. Both these groups value the role of government, but they do not agree in terms of what that role is.



The **Positive Enablers** returned to fifth place although the size of the group decreased from 12% to 10%. The groups with an altruistic focus started to slowly increase their position and relevance in society by getting involved in the altruistic things they do, shaping the character of the nation.

Another consequence of the 2018 disillusionment is that **Proud Democrats**, the foundation of what was achieved in 1994, were no longer a relevant part of the national identity, ranking last. Being South African no longer seemed to be intertwined with being part of a democracy.

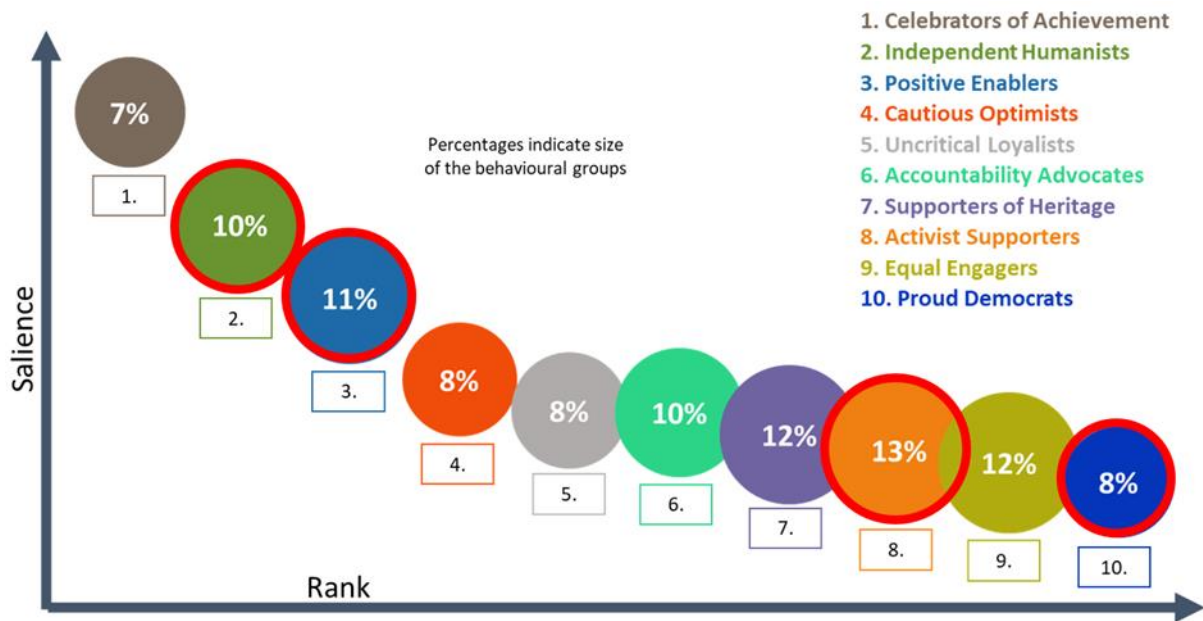
5.4. 2020 – The great reset

The year 2020 was a turning point for most nations and the world. In South Africa, on 26 March, the nation was in shock when Level 5 lockdown was announced. In the April monthly survey, the level of satisfaction with the performance of government and how democracy works was at an all-time low. As this was before the full impact of the first wave of COVID-19 infections took effect, the effect of the virus compared with the restrictions in movement did not make sense. By May, the two indicator scores had returned to normal as the full effect of COVID-19 emerged during Wave 1.

For a nation that was in recovery from the impact of 2018, and with many unanswered questions, going into the COVID-19 reality was going to be either a particularly good or an untimely event. It proved to be the former. The nation regrouped around the pandemic in a less polarised way. The

Independent Humanists and the **Positive Enablers** came together in second and third place respectively, and they eventually merge in 2021.

Celebrators of Achievement moved to first place as the media reported about the frontline heroes, charitable deeds of people helping others, and the natural environment finding relief from pollution. Conversely, the **Uncritical Loyalists** slipped into fifth place from third, losing their relevance in defining the nation’s character.



The **Equal Engagers**, a new group, emerged. This group is a splinter group of the **Uncritical Loyalists**. Although still at an early stage of development, the group strengthened their position in 2021. The dominant characteristic of this group is functional communities where services are delivered, and government is held accountable through local councillors and the like. This group believes that everyone should have an equal opportunity to live in areas such as the ones they do, and communities are places one can contribute to. The expectation is that everyone should be equal to contribute, and not necessarily contribute equally.

5.5. 2021 – Finding direction

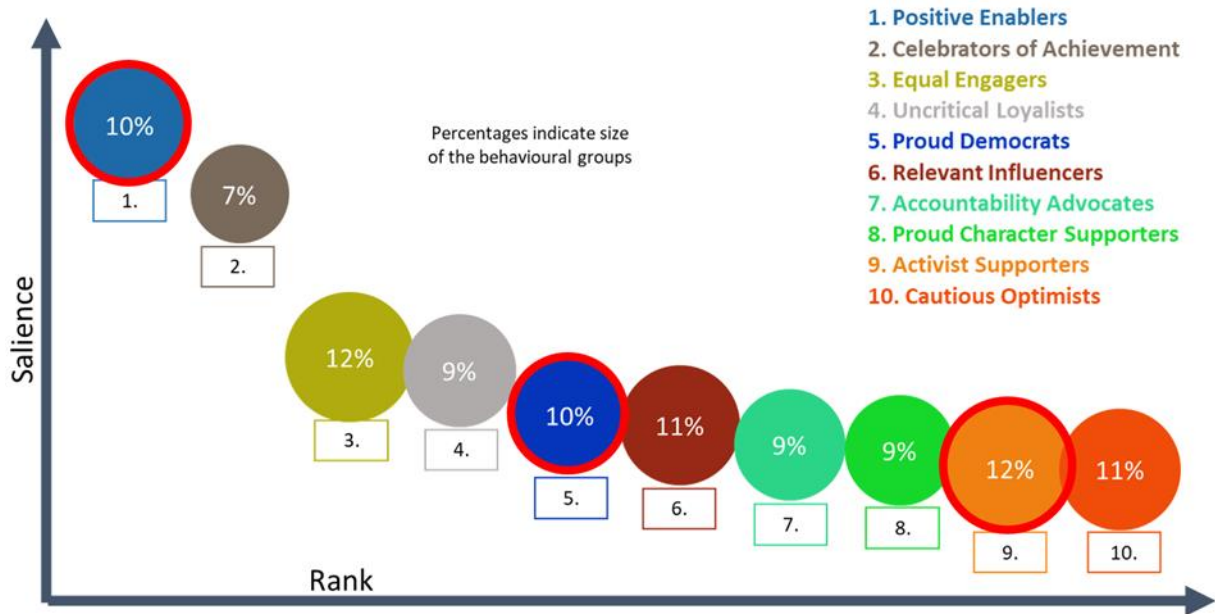
Immediately after the local elections on 1 November 2021, data collection for the fifth wave of the research programme started. The findings show a return to the caring character of the nation, but stronger than before.

Interestingly, the strong presence of and reliance on government have faded. The behavioural groups show signs of a weaker dependency on government, which could be the initial step towards a maturing and independent national identity.

The **Independent Humanists**, characterised by a deep level of care and appreciation for the diversity of the nation, have merged with the **Positive Enablers**, the most active citizens of the country (although no longer exclusively so, as before). All behavioural groups are showing some level of involvement in the community, even if only in their direct neighbourhoods. The exclusivity of the **Positive Enablers** has faded and people with other anchors for what it means to be South African are

getting involved to improve conditions. The **Positive Enablers** now represent the most important characteristic of the nation.

The **Celebrators of Achievement** have remained high in the ranking, in second place. The **Equal Engagers**, who live in communities where services are delivered and who hold political figures accountable, have moved from ninth to third position. This group is taking action to ensure that the government systems in their communities are administered and managed effectively. The **Equal Engagers** are working towards the improvement of the lives of all to ensure equality by holding public figures accountable.



The **Uncritical Loyalists** have moved up one position to fourth place. This group has dramatically reduced their dependence on the government to three spheres: healthcare, education, and social security. Their confidence in the guidance and support from government has faded, and their focus on essential needs has reduced their dependence, which is the reason the group has shifted up one position.

Proud Democrats have made a huge comeback from last to fifth position. Freedom, including the right to express oneself based on democratic principles and rights, is valued as part of the overall character of the nation.

A new group has emerged: the **Relevant Influencers** group. They value what South Africa stands for and the position it takes on the world stage, as a place where the fair treatment of all is a foundational element of the country. To them, South Africa sets an example of what it means to live in a diverse country and to treat everyone the same. Although the group is unhappy about the performance of government, they value what South Africa stands for.

Accountability Advocates have always remained around positions five to seven. However, their salience score is slightly higher than the previous year. They believe government can improve the lives of all and is accountable. The group is positive and accommodating but with strong boundaries for responsibility.

The **Supporters of Heritage** group has disappeared. In 2020, this group grew more sceptical of historic recognition of our heritage. The group shared real concerns about the future of the country but were reluctant to do something about it. Consequently, they felt marginalised and isolated with a passive-aggressive mindset. Therefore, the group split and formed part of other behavioural expressions.

Another new entrant, **Proud Character Supporters**, are the cheerleaders. They recognise the character of the nation as a caring nation with a true concern for its people. This is the first time such a group has emerged. Usually, the groups have represented external features of the nation. However, this group recognises the nation's soul. It is likely that this group will grow stronger in subsequent years.

In second last place, **Activist Supporters** remain a large group. However, the group is showing signs of feeling marginalised and isolated. Although many are employed, their earnings are slightly below the national average. The group supports government efforts and has a higher-than-average inclination to vote for the ANC. Interestingly, in terms of social engagement they feel much closer to others than a year ago, even though they live in areas where there are risks of protest action and other dangers. It is likely that the character of the group is beginning to change.

The last group, the **Cautious Optimists** are the least relevant when describing the character of the nation. Their general reference to South Africa as a good place to invest or do business has been replaced with more specific and defined elements of nationhood such as the value of democracy, mutual support, and achievements, as seen in the other groups.

6. What next?

The words of H.K. Bhabha encapsulates this historic reflection:

“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.”

Homi K. Bhabha^[1]

The South African nation is finding a new direction, stronger and more resilient compared with the 2017 benchmark year. Two major events have led to this. First, the level of trust in the government that had brought about great and needed change, was damaged. Second, the reality of life, as a precious gift but at the same time fragile in the presence of a pandemic, reminded everyone of the need to look after one another and to build something that has meaning.

In a year from now and with many uncertainties around the world, the groups may shift yet again to process what transpires.

In terms of the role of building a nation brand it is important to recognise, nurture and protect the nation's ability to care for one another.

^[1] Homi K. Bhabha. 1990. *Nation and narration*. Routledge: New York, p. 19

7. The research team

African Response (Pty) Ltd and MarkData (Pty) Ltd jointly developed the BSA Domestic Perceptions Research Programme. The statistical analysis techniques are internationally recognised. The programme director is Jan Wegelin, Managing Director: MarkData.

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