

SOUTH AFRICA

GLOBAL REPUTATION STUDY

2024 HIGHLIGHTS

GLOBAL REPUTATION STUDY 2023/24 REPORT LAUNCH PROGRAMME

Executive Summary

As part of Brand South Africa’s mandate to monitor and enhance South Africa’s Nation Brand Reputation, in collaboration with government, the business sector, and civil society, the organisation conducts global research to assess the country’s reputation and competitiveness in key strategic markets.

In today’s interconnected world, a nation’s reputation is fundamental for attracting investment, tourism, and talent. Understanding South Africa’s position relative to other nations is essential for identifying areas of strength and areas needing improvement.

This study serves as a pivotal indicator of South Africa’s standing within the contemporary globalized environment and its comparative analysis against other nations. Insights from the Global Reputation Study are crucial for positioning the country as an attractive investment destination and a desirable place to visit, live, and work.

Key Study Objectives

- ✓ Evaluate perceptions about South Africa across key international markets.
- ✓ Identify strengths, weaknesses, opportunities, and threats impacting South Africa’s global reputation.
- ✓ Inform and promote collaborative strategic public, private & civil society initiatives aimed at enhancing South Africa’s image and competitiveness in the global arena to attract investment, tourists & talent.

Sample	9800 online international surveys conducted among people who are familiar and unfamiliar with South Africa
Screening questions and profiling	<ul style="list-style-type: none">• Tourists that have travelled internationally for leisure purposes at least twice, during last 2 years.• Talent considering studying or working abroad. Businesspeople with international background and decision making
Distribution by Brand dimensions	Five brand dimensions: 1.Tourism, 2.Investment, 3.Exports, 4.Talent (Workers and students), 5.General reputation
Distribution by Target market (country of origin)	Seventeen target markets-Americas (2): United States and Canada-Europe (5): UK, Germany, France, Netherlands Switzerland-Asia (6): China, Japan, India, UAE, Saudi Arabia, Australia-Africa (4): Ghana, Kenya, Egypt, Botswana
Competitors	Nine competitors-Nigeria, Egypt, Vietnam, Thailand, UAE, Turkiye, Chile, Brazil, United Kingdom
Desired rank of perceptions	The survey employs a desired rank of perception set at 3.5. We call it the Love Mark, the point where a Nation can be considered to have a strong brand.



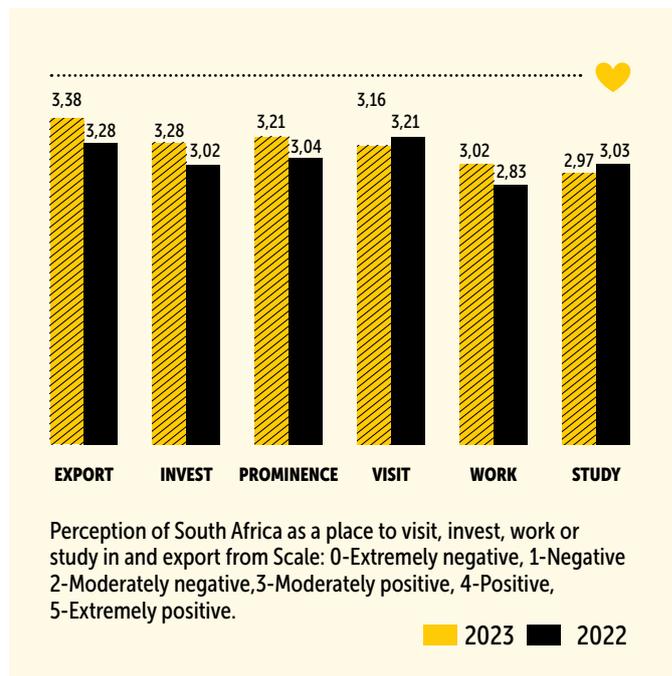
In comparison with the 2022 results, South Africa has improved its perception in the majority of dimensions.

South Africa has a good perception but there is room for improvement, as none of the dimensions reach the "lovemark" (score above 3,5).

Exports lead the brand dimension benchmark followed by Investment, which has improved significantly compared to last year's report.

Tourism has experienced a slight decline in positive perceptions and is now behind Prominence which has grown significantly (general reputation of the country).

Perceptions about South Africa as a place to work have increased and Studying in SA has experienced a slight decline.

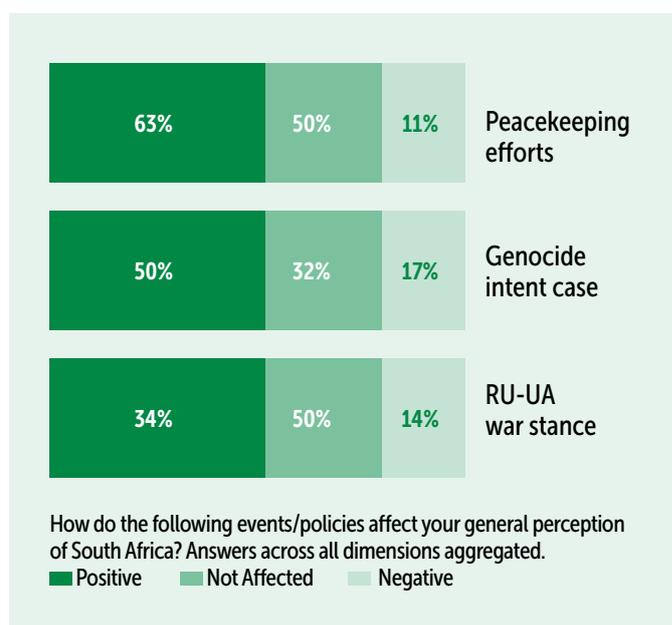


International policies are having a positive impact on South Africa's perception and global reputation.

In general, policies adopted by South Africa help its perception among all the audiences within the target markets.

The most notable support can be identified in the peacekeeping efforts of South Africa, while the stance on the war between Russia and Ukraine do not generate as much positive perceptions about the country.

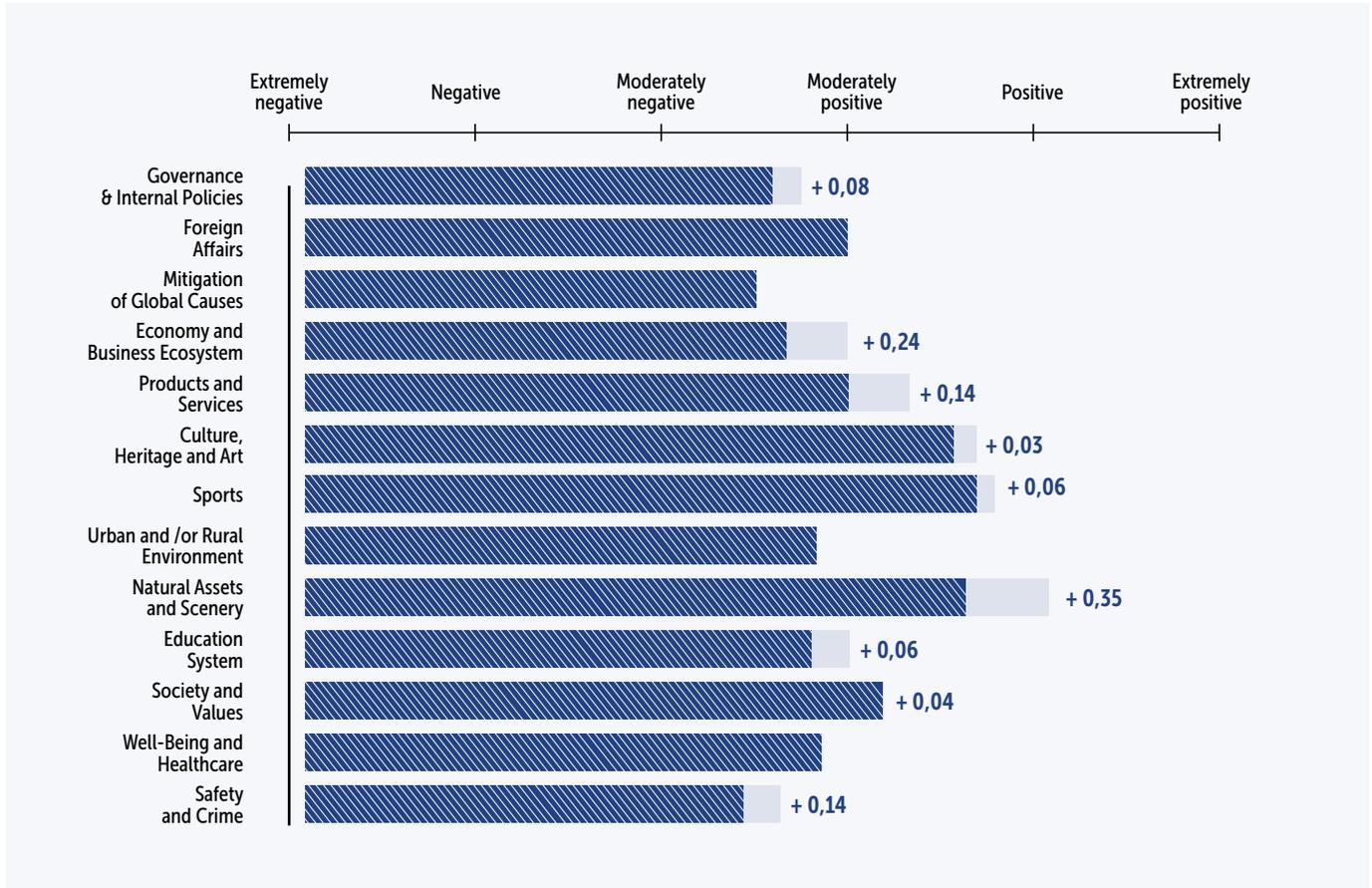
South Africa's ICJ case against Israel has had a positive impact on the country's global reputation. A reflection of the country's growing Soft Power and influence in global politics.



Economy and Natural assets are perception elements that have improved.

Three of the 13 perception elements are perceived significantly higher compared to the past study, with an increase of approximately 0.14-0.34 scores.

These elements are Products and Services, Economy and Business Ecosystem, and Natural Assets and Scenery. Other perception elements are perceived similarly over time by South Africa’s target markets.



South Africa’s Ranking in terms of Prominence ---Love Mark (3.5) ■ Gap 2023 ■ Gap 2022

Natural assets, Sports and Culture are the strongest elements.

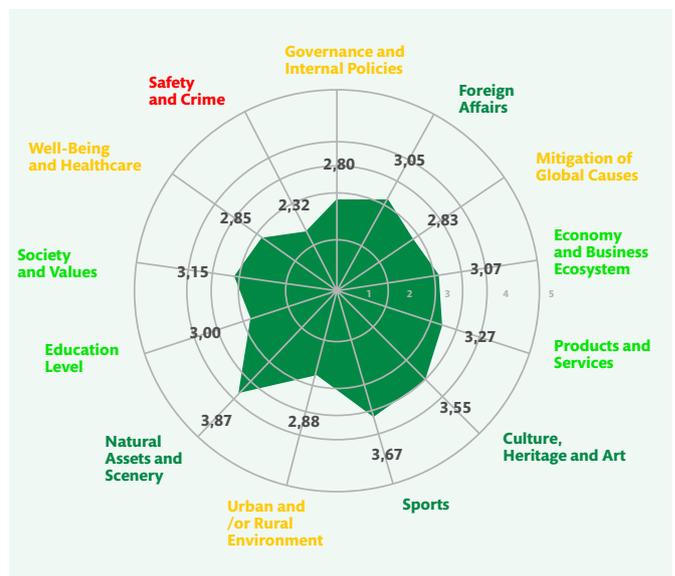
Economy & Business Ecosystems, Products and Services (Exports), Society and Values, and Education are well ranked.

Mitigation of Global Causes, Well-Being and Healthcare and Governance are ranked moderately well.

While Safety and Crime is still a concern.

South Africa’s Ranking in terms of Prominence

■ >4.0 ■ 3.9-3.5 ■ 3.5-3.0 ■ 3.0-2,5 ■ < 2.5
---Love Mark (3.5)



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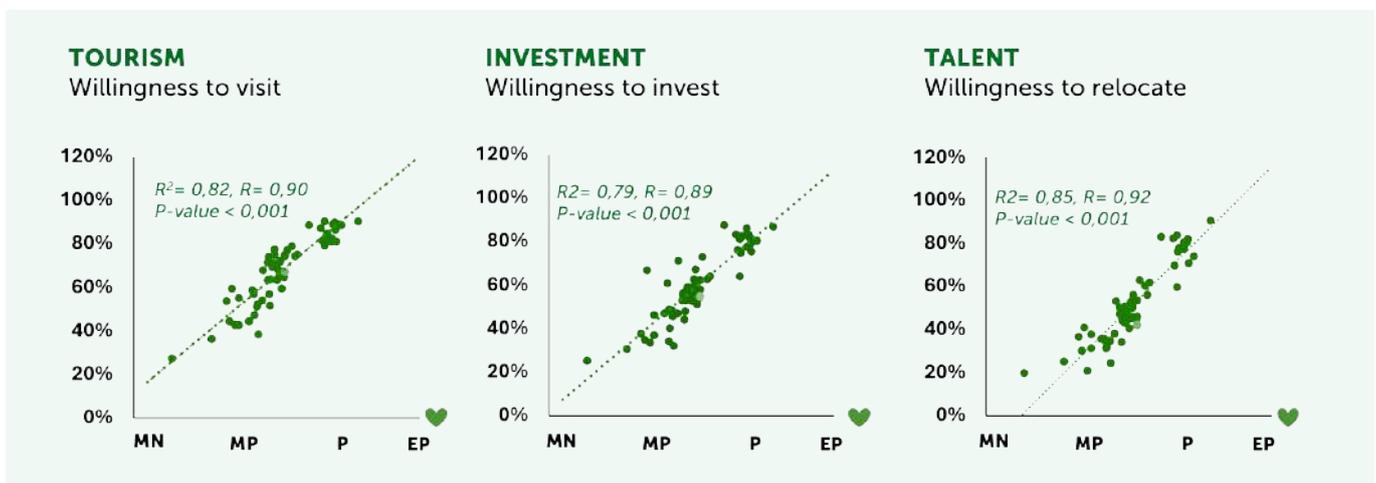
Among benchmarks South Africa ranks 3rd in the majority of the dimensions, only behind the UK and UAE, except on Tourism and Study. When it comes to South Africa's competitors' perception, the United Kingdom outperforms all countries across all dimensions.

South Africa does well overall, ranking third in the Prominence, Work, Investment, and Exports dimensions. Compared to the last research study performed in 2022, these brand dimensions have jumped in the benchmark ranking. The Touristic perception ranks lower than other brand dimensions, but maintains its benchmark ranking position compared to the 2022 report.



Perception of South Africa in different dimensions compared to competitors Scale: 0-Extremely negative, 1-Negative 2-Moderately negative, 3-Moderately positive, 4-Positive, 5-Extremely positive

Strong correlation between perception and willingness to visit, invest or relocate, respectively.



MN: Moderately negative, MP: Moderately, P: Positive, EP: Extremely Positive

Nature, attractive business environment, culture and history are the reasons to visit or do business in SA.

Nature, Culture and People are the main incentives for people to visit, study or work in South Africa.

Attractive business climate, economic strength and stability, and low operating costs are among the top reasons attracting business people to South Africa.



Tourism



Investment



Export



Work



Study

South Africa top of mind associations have improved, with a higher positive share.

The top associations in 2024 focused on positive aspects 68% of the time, representing an 11-percentage point improvement compared to the same study conducted in the past.

Among the top associations in both cases, we can see Wildlife, Nelson Mandela, and Beauty, which have significantly increased, surpassing Apartheid. The latter, along with Poverty and Crime, are the main detractors of South Africa's general perception.

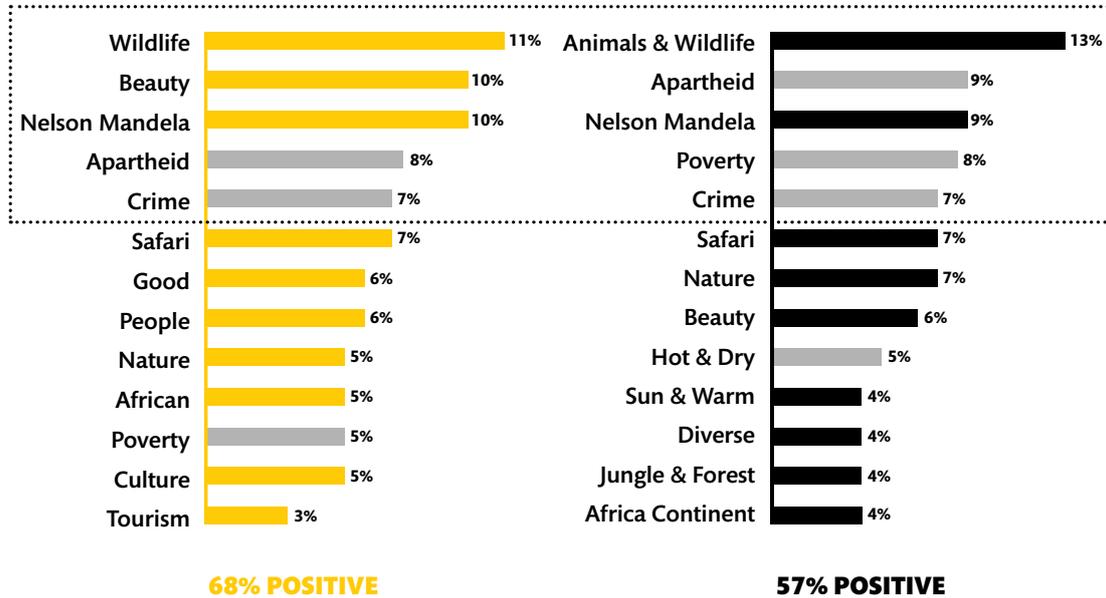


Figure: Top-of-mind associations with South Africa by sentiment comparing 2022 and 2024

USA is the most important target market.

When comparing digital demand in target markets, the United States take a clear lead in all the dimensions.

India is ranked first in Prominence due to the importance of Sports, in particular, Cricket. Other key markets are the United Kingdom and India in Investment, Export and Study, and Germany in Tourism and Work.

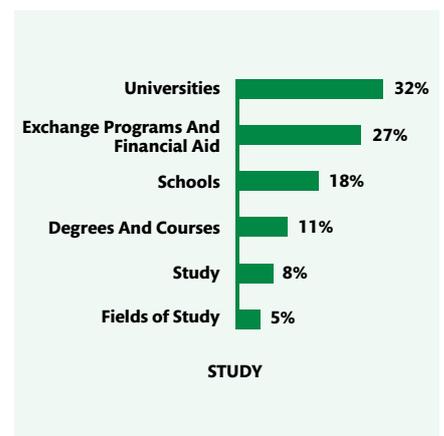
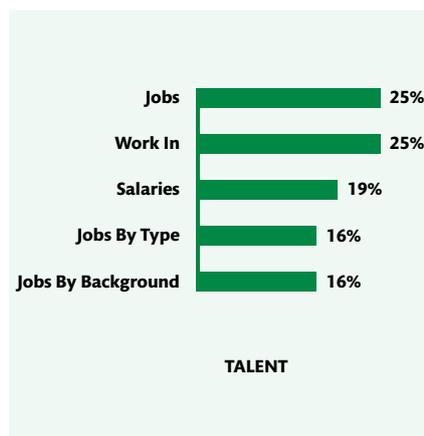
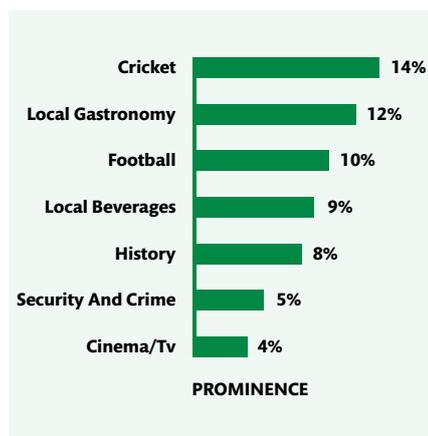
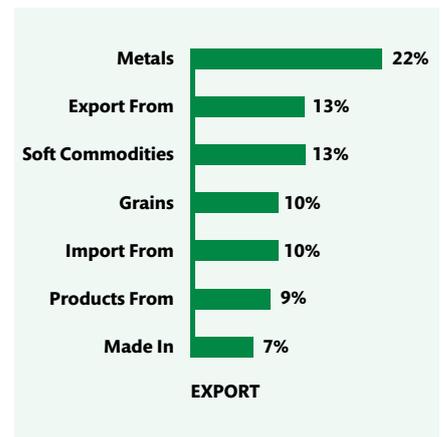
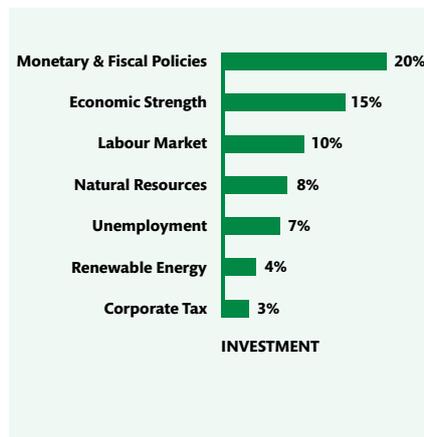
Top target markets in each dimension

#	Country	Searches	#	Country	Searches	#	Country	Searches
1	USA	926K	1	USA	117K	1	USA	29K
2	Germany	759K	2	U. Kingdom	103K	2	U. Kingdom	17K
3	U. Kingdom	660K	3	India	63K	3	India	15K
4	India	465K	4	Germany	52K	4	Germany	10K
5	Netherlands	409K	5	Australia	41K	5	Australia	8,4K
Tourism			Investment			Export		
#	Country	Searches	#	Country	Searches	#	Country	Searches
1	India	787K	1	USA	149K	1	USA	48K
2	USA	755K	2	U. Kingdom	102K	2	India	31K
3	U. Kingdom	476K	3	Germany	77K	3	U. Kingdom	30K
4	Japan	302K	4	India	61K	4	Germany	20K
5	Australia	300K	5	France	47K	5	Australia	18K
Prominence			Work			Study		

South Africa is most searched for its Cities, Monetary Policies, Metals, Sports and Universities.

Digital searches show what global audiences search for online about South Africa. Destinations (cities and regions) is the undisputed category for tourism related searches, followed by other generic searches including Travel, Attractions, and Tourism Packages among many.

Safaris are the most demanded touristic activities. Monetary and fiscal policies and economy were most significant for Investment, and Metals topped the list for Exports. Sports and Gastronomy lead in prominence and Universities for talent attraction.



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