South Africa

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BRAND SOUTH AFRICA STATE OF THE NATION BRAND REPORT 2024-2025

G20

SOUTH AFRICA 2025

PREAMBLE

As South Africa assumes the G20 Presidency under the theme "Solidarity, Equality, Sustainable Development," the **2024/25 State of the Nation Brand Report** offers a vital lens into the evolving social, economic, and political landscape of the country. Grounded in the **Domestic Perceptions Study**, now in its eighth year, this report represents the third official edition of Brand South Africa's flagship analytical publication.

The **Domestic Perceptions Study** is Brand South Africa's longest-running barometer of national sentiment an annual, population-representative survey that tracks how South Africans perceive themselves, their society, and the direction of the country. **The State of the Nation Brand Report**, first introduced in 2022, draws on this empirical foundation to offer an in-depth analysis of trends and insights that inform brand positioning, policy direction, and global engagement strategies.

In an era marked by contested narratives and external political rhetoric, this report affirms the right of South Africans to tell their own story. Grounded in data, it provides a credible, evidence-based counterpoint to misrepresentation and reinforces Brand South Africa's mandate to uphold truth, authenticity, and national dignity on the global stage.

Since its inception, the Domestic Perceptions Study has consistently tracked three core indicators that define the emotional and social architecture of the Nation Brand: **social cohesion, national pride,** and **active citizenship**. These are not abstract ideals—they are measurable reflections of how people relate to one another, to their country, and the broader democratic project. In the context of South Africa's G20 leadership, they speak directly to the values of **unity, dignity, and inclusive development** that underpin our national identity.

Over the last eight years, the study has chronicled the country's navigation through complex and defining moments: the exposure of state capture, the COVID-19 pandemic, social unrest, economic volatility, and most recently, the formation of the **Government of National Unity (GNU)**. Through all of this, South Africa's national sentiment has evolved—from early democratic optimism to measured reflection, and now, to an emerging confidence in collective agency.

Crucially, the basis for national pride in 2024 is different from what it was in 2017. While both periods recorded high scores, the underlying drivers have shifted—from symbolic optimism to grounded belief in shared values, contribution, and possibility. South Africans are not merely hoping for progress—they are co-authoring it.

Minister in the Presidency
Ms. Khumbudzo Ntshavhen

Deputy Minister of The Presidency
Mr. Kenny Morolong

Brand South africa chairperson
Ms. Ipeleng Selele

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IMPORTANT DEFINITIONS

Throughout this report, the following terms are used. It is important to get the context right for the interpretation to make sense.

Horizontal social cohesion:

Within the broader ambit of social cohesion, horizontal social cohesion refers to the relationship between people, whether in communities, towns, cities, or at a national level, with fellow South Africans.

Vertical social cohesion:

Refers to the relationship people have with the state. The state, in this instance, refers to the broader authority as an overarching system to maintain order. These could include civil society, government, political parties, the police, and so forth. People have both angles of social cohesion (horizontal or vertical) as they relate to South Africa as a nation. However, some have dominating horizontal notions, whereas others have dominating vertical notions; the former tend to be relational, and the latter dependent.

Salience:

In this report, salience refers to the statistical expression of how closely a cluster or behavioural group resonates with what it means to be a South African. The higher the score the more closely the group resembles the character of the construct or what it means to be a South African within the context of the year. Conversely, the lower the score the further away the group is to the character of the nation.

Group Size:

The size of the group is expressed as both a %age of the total population but as seen in the behavioural group analysis, that %age can also be expressed as the number of South Africans that associate with that group. The base assumption is that all South Africans, aged 16 years and older calculated to 42.2 million people.

2024 - National representative survey,	November 2024 (n=3030 (weighted)),
2023 - National representative survey,	February 2024 (n=2559 (weighted)),
2022 - National representative survey,	November 2022 (n=2512 (weighted)),
2021 - National representative survey,	November 2021 (n=2511 (weighted)),
2020 - National representative survey,	November 2020 (n=2501 (weighted)),
2019 - National representative survey,	November 2019 (n=2506 (weighted)),
2018 - National representative survey,	November 2018 (n=2511 (weighted)), and
2017 - National representative survey,	November 2017 (n=2509 (weighted)).

1. Foreword

The launch of the 2024/25 State of the Nation Brand Report during South Africa's G20 Presidency under the banner of "Solidarity, Equality, Sustainable Development" arrives at a pivotal moment. As we mark 30 years of democracy, this report offers not only a reflection on progress but also a reaffirmation of the values that bind us as a nation. It captures the voice of South Africans as they define what it means to belong, to believe, and to build a future together.

It is my privilege to present this year's edition of the State of the Nation Brand Report: a data-driven mirror into the evolving identity, expectations, and resilience of our people. As we continue to chart our democratic journey, the findings remind us that the project of nation-building is a living one continually shaped by each generation's engagement with justice, opportunity, and unity.

The findings of this year's Domestic Perceptions Study offer clear signals. South Africans remain deeply committed to the values of unity, fairness, and justice. They recognize our country's achievements, but they also call for more responsive governance, inclusive growth, and equitable opportunity. These are not just expectations; they are expressions of trust in the democratic process and belief in its potential.

The rise in the Social Cohesion Index should not only be read as a measurement it is a message: South Africans are moving forward, together. As a government, we receive this message with humility and resolve. It is our duty to match this public confidence with delivery, accountability, and transformation that reaches every corner of our society.

The findings reflected here show that our democracy remains resilient, our people are actively engaged in shaping their communities, and our shared national identity continues to strengthen. What distinguishes South Africa in a complex and competitive global environment is not just its natural endowments or institutions, but the unwavering commitment of its people to build, contribute, and co-create a better future. This deeply embedded sense of belonging and responsibility is our greatest strategic asset.

Importantly, the report aligns with our G20 theme, highlighting the values of solidarity and inclusive development that underpin our national vision. These are not abstract principles; they are lived daily by South Africans across all provinces, communities, and backgrounds.

As the Deputy Minister in the Presidency, I commend the work of Brand South Africa and its research team for capturing the sentiments that shape our identity, inspire our efforts, and guide our policy direction. This report is more than a research exercise—it is a strategic asset for nation building and global engagement. Let it inform our path forward as we continue to tell our own story, with confidence and credibility, to the world.

Mr. Kenny Morolong
Deputy Minister of The Presidency

2. Message from Brand South Africa CEO

This 2024/25 State of the Nation Brand Report is the culmination of eight years of rigorous data collection through Brand South Africa's Domestic Perceptions Research Programme. Now in its third edition as a consolidated report, it remains the only nationally representative study dedicated to tracking the social indicators of National Pride, Social Cohesion, and Active Citizenship as the foundational pillars of South Africa's Nation Brand.

At Brand South Africa, we believe that the power of a Nation Brand and its positioning globally lies not only in its global reputation, but in the lived experiences and aspirations of its people. This report reflects the authentic, unfiltered voice of South Africans across all demographics and regions. It tells a story of cautious optimism, grounded in resilience, and driven by the renewed momentum we have seen in 2024 following the historic national elections and the formation of the Government of National Unity (GNU).

What emerges from this study is a simple but powerful truth: South Africa's most valuable asset is its people and their deep-seated belief that progress is possible when built together. Whether it is trust in institutions, the willingness to participate, or an enduring sense of Ubuntu, the data shows a society re-engaging with itself and reaffirming its role in shaping its future. Ubuntu, as a core value of our nationhood, reflects the idea that our humanity is deeply interwoven with the well-being of others; it is this ethos of shared purpose and empathy that continues to guide our national trajectory.

As the official marketing agency of the Nation Brand, we at Brand South Africa recognize that national identity is not static. It is shaped by our actions, our values, and our collective will to grow, improve and unite. We are proud to offer this report as a resource for policymakers, businesses, civil society, and the public to inform strategic decisions, foster shared meaning, and promote inclusive nation building.

In this pivotal year for our democracy as G20 president, this report serves as both a barometer and a blueprint. It signals the opportunity to deepen social cohesion, deepen public trust, and unlock our collective potential as a country and continent. May it be used to galvanise all sectors public, private, and civil society towards a future defined by shared purpose and possibility.

Neville Matjie
CEO of Brand South Africa

3. Key Study Highlights

The 2024/25 State of the Nation Brand Report, derived from Brand South Africa's eighth **Domestic Perceptions Study,** provides an authentic, data-driven pulse check on how South Africans see themselves, their institutions, and their future. The findings reflect a nation navigating adversity with optimism, and asserting a renewed commitment to national identity, civic engagement, and inclusive development.

Social Cohesion

Rose to 65.7 a notable increase after five years of stability. The formation of the Government of National Unity (GNU) reignited public optimism, not only in leadership but in each other.

National Pride

Has reached its highest level since tracking began, rising to 75.0. This pride is no longer rooted in symbolism alone it is substantiated by citizens' appreciation of the country's leadership, achievements, democratic institutions, and cultural diversity.

Active Citizenship

Is rebounding, with a visible shift from disengagement to localized action. South Africans are stepping forward in ways that matter, from neighborhood safety forums and school governance to volunteerism and advocacy.

Trust in institutions has strengthened,

Most notably in the private sector (72%) and government (63%, up from 55%). This shift corresponds with the post-election period and formation of the GNU. It reflects growing public confidence in collaborative governance and structural reforms.

Confidence in democratic progress is recovering

In 2022, only 32% felt life had improved since democracy. In 2024, that figure rose to 49%. Those with higher education levels showed significantly greater appreciation for democracy's impact, underscoring the importance of civic education in strengthening democratic values.

South Africa's role as an inspirational nation has gained momentum

With an average 15% increase across sentiment measures related to global influence, innovation, and moral leadership. Despite polarised geopolitical dynamics, many South Africans believe the country sets a strong example – regionally and globally.school governance to volunteerism and advocacy.

Cultural identity and heritage appreciation remain strong drivers of national unitym

While government efforts to recognise diversity are valued, they rank lower than personal and community-based expressions of heritage. South Africans take pride in their culture, language, humour, and empathy – characteristics that make up the soft power of the Nation Brand.

Social openness is showing early signs of recovery

While willingness to engage with strangers declined in recent years reflecting societal stress and shrinking circles of trust 2024 shows a slight rebound. The underlying driver remains emotional safety: when people feel hopeful, they are more inclined to reconnect with others.

Community engagement sentiment improved across all indicators

While fatigue and social strain remain present, citizens express a sense of re-empowerment following the elections. Cooperation across race groups and belief in the value of dialogue are trending upward. Caution remains but so does constructive expectation.

Public sentiment on government's role in building cohesion shifted positively.

In 2023, only 31% viewed its performance favourably. By 2024, that figure rose to 45%, with negative sentiment falling from 36% to 22%. While a third remain neutral, the trajectory signals growing belief in government's ability to unite rather than divide.

Confidence in the Nation's Future Strengthens Across Key Dimensions:

The 2024 data reveal a significant surge in national confidence across nearly all governance and development indicators. Public belief in health policy (57%), national unity (55%), and the country's ability to collaborate as one (55%) leads the optimism, marking a decisive rebound from the uncertainty of previous years. There is also notable recovery in confidence regarding political leadership, job creation, and safety each showing double-digit growth since 2022. This uplift reflects the early impact of the Government of National Unity (GNU), a broad-based political realignment that has renewed expectations of reform, shared purpose, and institutional accountability.

4. Executive Summary

The year 2024 marked a pivotal moment in South Africa's democratic journey. Following the national elections in May, the country once again adopted a Government of National Unity (GNU), reviving a model last seen during the historic post-1994 transition. This renewed GNU, officially established on 18 July 2024, reflects a shift toward multiparty cooperation in response to a dynamic and evolving political landscape. Conducted in November 2024, four months after the GNU's formation, this study captures a national mood characterized by cautious optimism, renewed civic energy, and a collective hope for inclusive and accountable governance. The development of a national identity and cohesive society is a continuous journey—never fixed, always evolving. In South Africa, this evolution is shaped by collective memory, lived realities, and a deepening understanding of what it means to be part of a diverse, democratic society. The 2024/25 State of the Nation Brand Report captures this ongoing story, grounded in empirical data, behavioural insights, and the authentic voices of South Africans.

Drawing from the Domestic Perceptions Study—the foundation of this report—Brand South Africa identifies critical themes shaping the nation's image and self-concept. These include Social Cohesion, Active Citizenship, National Pride, Trust in Institutions, and behavioural clusters that express the country's emotional and cognitive landscape. Each element, while distinct, forms part of a greater national narrative of resilience, solidarity, and renewal.

4.1 National Social Cohesion Index: Building Bridges of Trust

Social cohesion in South Africa has seen a meaningful upturn, rising to 65.7 in 2024—the highest in five years. This shift signals a nation finding renewed strength in its collective identity and shared values. The improvement closely mirrors the public's growing confidence in inclusive governance, especially following the formation of the Government of National Unity (GNU). It is not simply a numeric change—it represents restored faith in community and the will to reach across differences.

The data also reveals that social cohesion holds steady even under pressure. While people may retreat into familiar spaces during times of crisis, they maintain an openness to connect when hope is present. The GNU, by promoting cooperation and diversity, has unlocked this potential. The upward trend suggests that, if supported by economic and social reforms, social cohesion can become the cornerstone of national renewal.

4.2 National Pride: A Reawakening of Identity

National pride remains a key emotional driver in South Africa's brand. The report reveals a deepening values-based identity, with 53% of respondents identifying primarily as "South African"—a sentiment that rises above race, culture, or language. Additionally, 49% see themselves as "African," reinforcing continental solidarity.

South Africans express pride in their cultural richness, democratic values, sporting achievements, and natural beauty. They also highlight unity in struggle, resilience, and a uniquely South African sense of humour. These are not fleeting attributes—they represent enduring emotional anchors. Importantly, national pride is no longer rooted solely in the promise of 1994 but in how people are living and expressing their identity today.

4.3 Active Citizenship: A Country That Shows Up

The data shows a meaningful recovery in active citizenship, as South Africans increasingly take ownership of societal progress. Community-led safety initiatives, volunteerism, educational support, and grassroots civic efforts demonstrate the resilience of civic engagement. Rather than retreating into apathy, citizens are asserting their agency.

For Brand South Africa, this is more than participation—it reflects confidence in shared responsibility. The rise of active citizenship reinforces the ethos of the flagship "Play Your Part" campaign. South Africans are not passive observers; they are actively shaping their communities and contributing to national cohesion.

4.4 Trust in Institutions: Rebuilding Credibility

Trust in institutions rebounded significantly between 2023 and 2024. The private sector leads with 72%, followed closely by the government, which saw notable gains, largely attributed to the formation of the GNU. Citizens feel vindicated in their electoral choices and are beginning to believe in the possibility of ethical, responsive leadership.

Importantly, this trust is expectation-driven. It reflects belief in potential, rather than confirmed outcomes. The data cautions that this optimism is fragile; sustained delivery and transparency will be essential to uphold it. Trust is also bolstered by government and business partnerships, as well as community-driven systems of mutual support, indicating that institutional credibility must be reinforced by inclusive delivery.

4.5 Democracy and Engagement: Reclaiming the Social Contract

More South Africans now believe life is better since the advent of democracy, with support rising from 32% in 2022 to 49% in 2024. This marks a return of belief in the democratic process as a mechanism for change. Citizens with higher education levels are more likely to appreciate and engage with democratic institutions, underlining the role of civic education.

Willingness to pay taxes—a tangible indicator of trust—has also increased, especially among historically sceptical groups. While challenges such as crime, unemployment, and service delivery remain top concerns, the broader narrative is one of constructive engagement and accountability.

4.6 A Rich Heritage: Celebrating Diversity

South Africans continue to take pride in their heritage and cultural diversity. This appreciation now extends beyond earlier narratives of the "rainbow nation" to embrace more grounded, values-based identifiers. Tolerance, humour, forgiveness, and community strength are celebrated as essential components of national identity.

While government efforts to promote diversity receive mixed ratings, the public has internalised and advanced this narrative in meaningful ways. The sense of shared humanity and Ubuntu is emerging as a powerful unifying force, and a source of pride in the uniqueness of the South African story.

4.7 Behavioural Clusters: Expressions of the National Character

The report's behavioural cluster analysis, based on more than 48,000 interviews over eight years, identifies nine distinct groups, each representing a unique expression of what it means to be South African. These range from Activist Supporters and Strong Community Networks to Cautious Optimists and Celebrators of Achievement.

The diversity of behavioural groups reflects a layered, multifaceted society. Importantly, the emergence of clusters like Social Enclaves suggests a need to prevent fragmentation by reinforcing inclusivity and national unity. At the same time, the prominence of Proud Character Supporters indicates a growing commitment to values-led identity.

4.8 Economic Shifts Since the Formation of the GNU

Positive economic signals are beginning to emerge. The projected GDP growth of 1.6% in 2025, the reduction in the prime lending rate, and the year-long stability in electricity supply all point to increasing consumer and investor confidence. These gains are supported by the public's recognition that meaningful employment cannot be decoupled from growth.

However, economic fragility remains. Rising debt, global volatility, and internal political tensions within the GNU could derail progress. To ensure long-term stability, the government must continue implementing structural reforms supported by systems of mutual support at community level.

4.9 Political Considerations: Unity Through Pluralism

The GNU has fostered optimism around inclusive governance and collective leadership. The Medium-Term Development Plan—focused on inclusive growth, poverty reduction, and ethical state-building—resonates with public sentiment. Nonetheless, tensions within the coalition must be managed carefully to preserve unity and credibility.

Importantly, grassroots systems of cooperation and accountability are playing a growing role in complementing state efforts. These dynamics, grounded in community solidarity and Ubuntu, offer a blueprint for participatory governance and long-term democratic consolidation.

4.10 G20 Summit on African Soil: **South Africa on the Global Stage**

As South Africa prepares to host the G20 Summit in Johannesburg in November 2025, the report reflects public enthusiasm and expectation. The Summit offers an unprecedented opportunity to project the nation's evolving identity and leadership on a global platform.

The Presidency's theme, "Solidarity, Equality, Sustainability," resonates deeply with the national mood. These are not just diplomatic slogans—they are lived values. South Africa's commitment to these principles, both domestically and internationally, will define its global reputation in the years to come.

The 2024/25 State of the Nation Brand Report is not merely a reflection of data it is a mirror of a society navigating complexity with resilience, hope, and a growing sense of collective purpose. South Africa's nation brand is being shaped not only by policy or politics, but by the spirit of its people—their ability to show up, to engage, and to reimagine what it means to build a country together.

This is the story of a country that continuous to shape its own identity, one courageous step at a time. A hopeful nation that has scars to heal.

5. Developing sentiments

Since 2022, and into early 2023, public sentiment reflected growing concern over government performance, particularly in meeting the expectations of service delivery, inclusivity, and ethical leadership. While frustrations were evident in focus group discussions and national data, the underlying message was not one of rejection, but of expectation—a call for governance that is more responsive, transparent, and people-centred.

This context helps explain the temporary contraction in behavioural clusters from ten in 2021 to eight in 2022 signalling a population consolidating its views around more clearly defined expectations of the state and public life.

With the establishment of the Government of National Unity (GNU) following the May 2024 elections and officially constituted on 18 July 2024 there has been a marked shift in public sentiment. While it is too early to assess the long-term outcomes of the GNU's programmes, the survey data collected in November 2024 reveals a meaningful rise in national optimism. This renewed hope is not yet anchored in extensive lived experience, but it is a significant national asset: a belief that collective leadership can deliver meaningful change.

Three key indicators underscore this emerging national optimism:

1. First, nearly all indicators show improvement from 2023 levels, suggesting a renewed sense of possibility across the country. South Africans are signalling that they believe progress is possible and that the conditions for it may now be taking shape.

2. Second, economic sentiment is strengthening. Lower inflation, a more stable energy environment, and increased policy coordination have contributed to cautious but growing confidence. However, the link between macroeconomic gains and inclusive employment remains a critical area of public expectation.

3. Third, the establishment of the Government of National Unity (GNU) following the 2024 elections has generated widespread hope. While it is still early to assess the impact, the very formation of a collaborative governance model has been positively received. It is viewed as a sign of political maturity and a shared commitment to the country's long-term well-being.

These three signals, taken together, present a moment of national alignment a rare period in which public trust, political will, and developmental ambition may converge. But this moment is also time-bound. Momentum must be nurtured, not assumed. The challenge for leaders and institutions will be to transform hope into delivery, and sentiment into impact. To understand the weight of this shift, it is important to reflect on the broader journey. In 2017, the first wave of the Domestic Perceptions Study captured a nation still deeply anchored in the promise of 1994. Confidence levels were high, and the country's collective identity remained rooted in the values of transition, reconciliation, and democratic renewal.

However, in 2018, as evidence from commissions of inquiry and public reporting revealed the extent of maladministration, public trust was tested. The disillusionment that followed marked a turning point. In the years that followed, persistent economic stagnation, rising unemployment, and a series of national disruptions—from the COVID-19 pandemic to the 2021 civil unrest, deepened a sense of fatigue. By 2022 and 2023, national sentiment had reached a low point. Insights from focus groups conducted in early 2024 revealed an emotional landscape shaped by exhaustion, concern, frustration, and a growing desire for responsive governance. Yet, within this atmosphere, the seeds of renewal were also taking root. The increase in the "freedom" identity cluster by four %age points between 2023 and 2024 is one such signal. It points to a reassertion of agency, and a growing desire among citizens to reclaim their role in shaping the nation's path. South Africans are not turning away, they are watching, engaging, and hopeful. This is further supported by the behavioural group analysis. In 2024, the number of behavioural clusters increased from eight to nine an indicator of greater social diversity and engagement.

Notably, the Independent Humanists, absent since 2020, re-emerged as a meaningful group. This return suggests a strengthening of civic values like empathy, diversity, and connection. A new group, the Social Enclaves, was also identified for the first time. Long anticipated by scenario planners, this group represents those living in more insulated and secure communities. While they exhibit strong local cohesion, their relationship with broader national dynamics is more cautious. Their emergence reflects deeper patterns of inequality and social fragmentation that must be addressed through inclusive, values-based nation-building.

From a Nation Brand perspective, these developments offer both a caution and an opportunity. They highlight the need for strategic messaging and sustained engagement that speaks to all South Africans across divides of geography, class, and experience. The hope rise is real, but it is also fragile. It is not yet based on consistent lived experience but on the promise of change.

This moment offers leadership across all sectors a powerful opportunity to reconnect with the nation. South Africans are ready to believe again if they are met with meaningful engagement, delivery, and a clear, united national vision.

In one of the focus group discussions last year, a participant said:

"These are the sentiments that go along with the hopefulness the nation now has. Should the hope be shattered, the above sentiments will become less salient and may deepen the political discontent."

This sentiment, while candid, speaks to the depth of South Africa's national character. It reminds us that resilience must ultimately give way to renewal. The hope reflected in this year's findings presents such a moment a shift from endurance to possibility. What we see emerging is not a rejection of resilience, but a desire to move beyond it. As optimism rises in the wake of political and social change, there is a growing call for transformation that is visible, inclusive, and lasting. Meeting this expectation will require sustained commitment from all sectors, but the foundation has been laid. The spirit of the nation is not weary, it is ready.

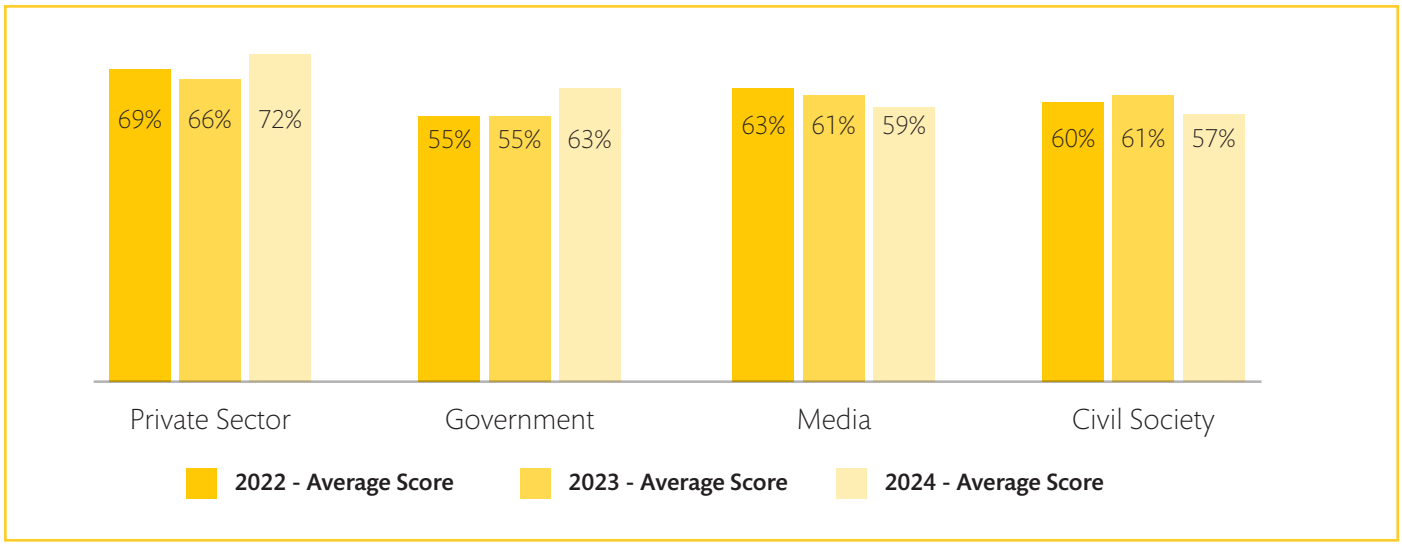
6. Trust in Context: Perceptions, Politics, and Institutional Confidence

This section covers the fundamentals of the relationship between the nation and the principles upon which it operates. The systems of governance, reputational influencers, South Africa as an inspirational leader, democracy, and other aspects. Most important to note is that the scores increased between 2023 and 2024.

Ranked according to those with the highest level of trust, the Private Sector (business fraternity) through to Civil Society at the lower end. The ranking changed substantially with Government moving to second place. Private sector increased to 72%, the highest score for any attribute in the last three years, accentuating the level of trust.

Central to this change is not only the formation of the Government of National Unity (GNU), but the leadership and political maturity demonstrated in its establishment. The GNU is a clear signal of a responsive and collaborative state one that prioritises national interest above partisanship. South Africans have seen the tangible outcome of their vote, and many feel affirmed in their democratic choices. This sense of restored hope is increasingly reflected in perceptions of government systems, institutional intentions, and public sector planning.

Figure 1:Level of trust in societal structures (the higher the score, the greater the trust)



Source: Brand SA: State of the Nation Report 2024

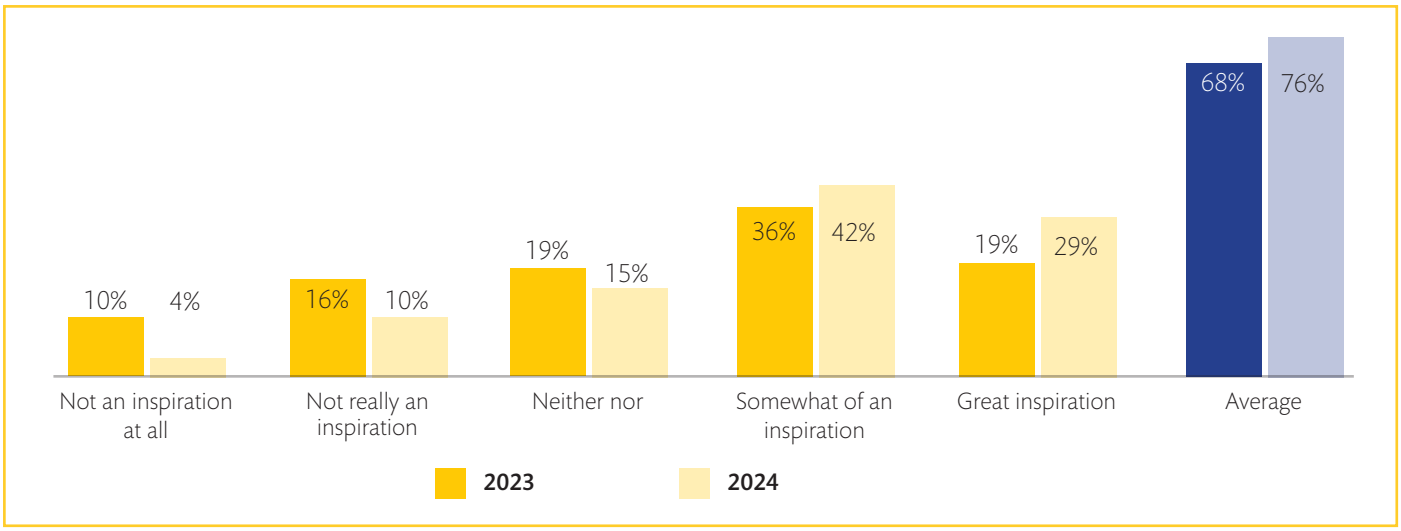
In broad terms, the pattern aligns between 2022, 2023 and 2024. The year 2023 was at a particularly low point just before the elections and now in 2024, after the establishment of the GNU, sentiments soar, particularly in the middle section. The message is clear, where leadership is inclusive, deliberate, and anchored in collective purpose, public trust follows. While trust in civil society and media has shown slight declines, the contrast between these scores and the gains seen by government and business offers important insight into where trust is being built and where renewed engagement may be required. The positive sentiments are mostly based on hope and positive anticipation that things will change for the better.

The GNU is still in its early stages, the initial public sentiment reveals renewed optimism. Focus group insights affirm that this sense of renewed hope is heartfelt yet developing underscoring the importance of sustaining constructive engagement and delivering visible progress to strengthen public confidence over time.

6.1 South Africa is an inspirational leader

Regarding South Africa as an inspirational leader, sentiments improve in 2024, accentuating the level of pride and trust in the government to inspire the nation and other nations. At the time of this survey in November 2024, the US elections were fresh, and Donald Trump had not been sworn in as president. In recent weeks, the Executive Order would have an impact on these scores. The current focus group sessions in which the executive order is discussed show that some are in favour and others are not. South Africa's position to continue the process in the International Court of Justice (ICJ) against Israel may also impact the scores in due course.

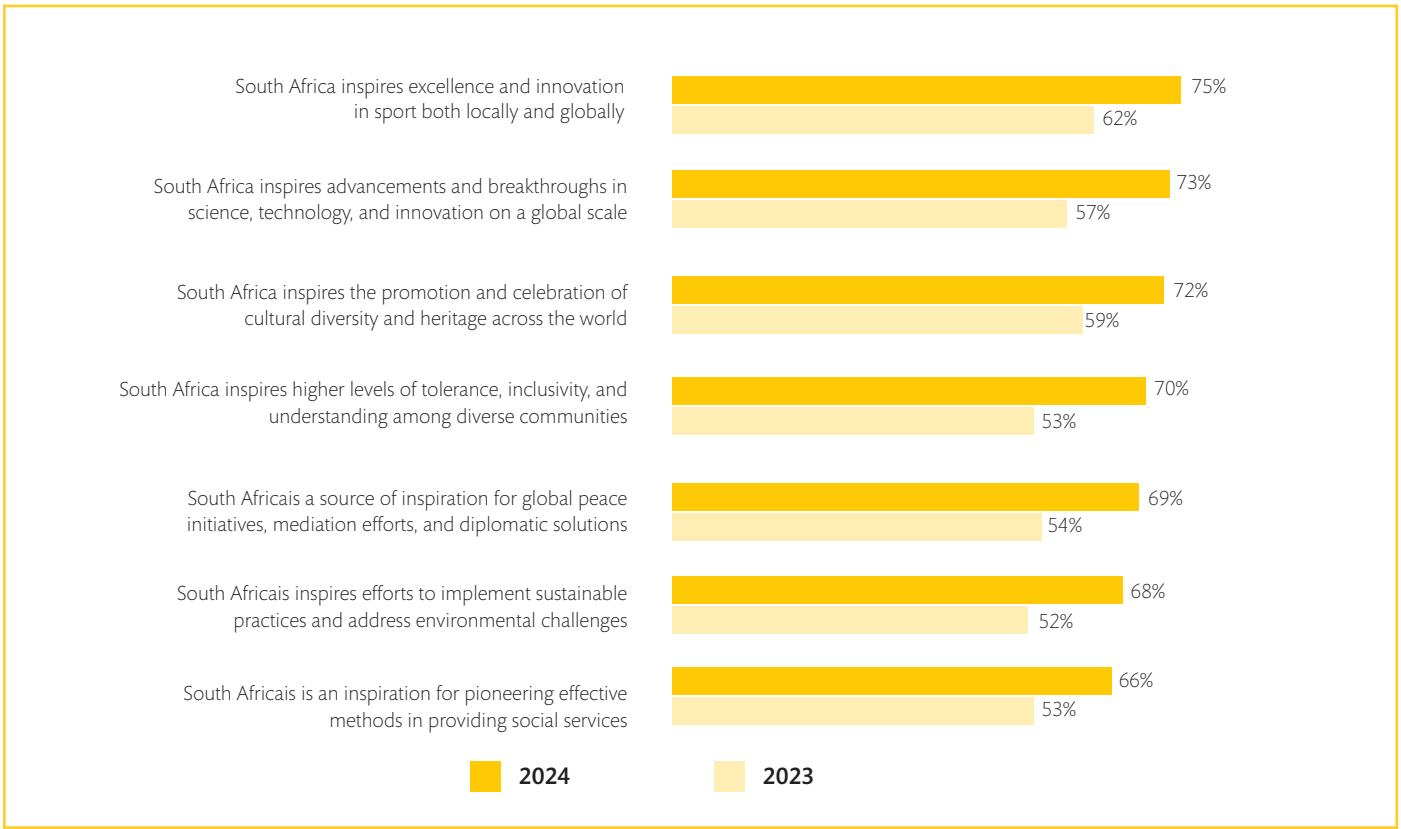
Figure 2: South Africa is considered more inspirational in 2024 than in 2023



Source: Brand SA: State of the Nation Report 2024

In terms of South Africa inspiring new and innovative approaches, on average, the scores improved by 15% between 2023 and 2024. This is a very clear endorsement of the level of confidence in the South African government's capacity and capability to influence and inspire at a local and global level. The order of the statements, from most to least, paints a picture of the aspects that are favoured most. The high expression of influence speaks to the national pride that is widely entrenched in the minds of South Africans.

Figure 3: How South Africa inspires the nation



Source: Brand SA: State of the Nation Report 2024

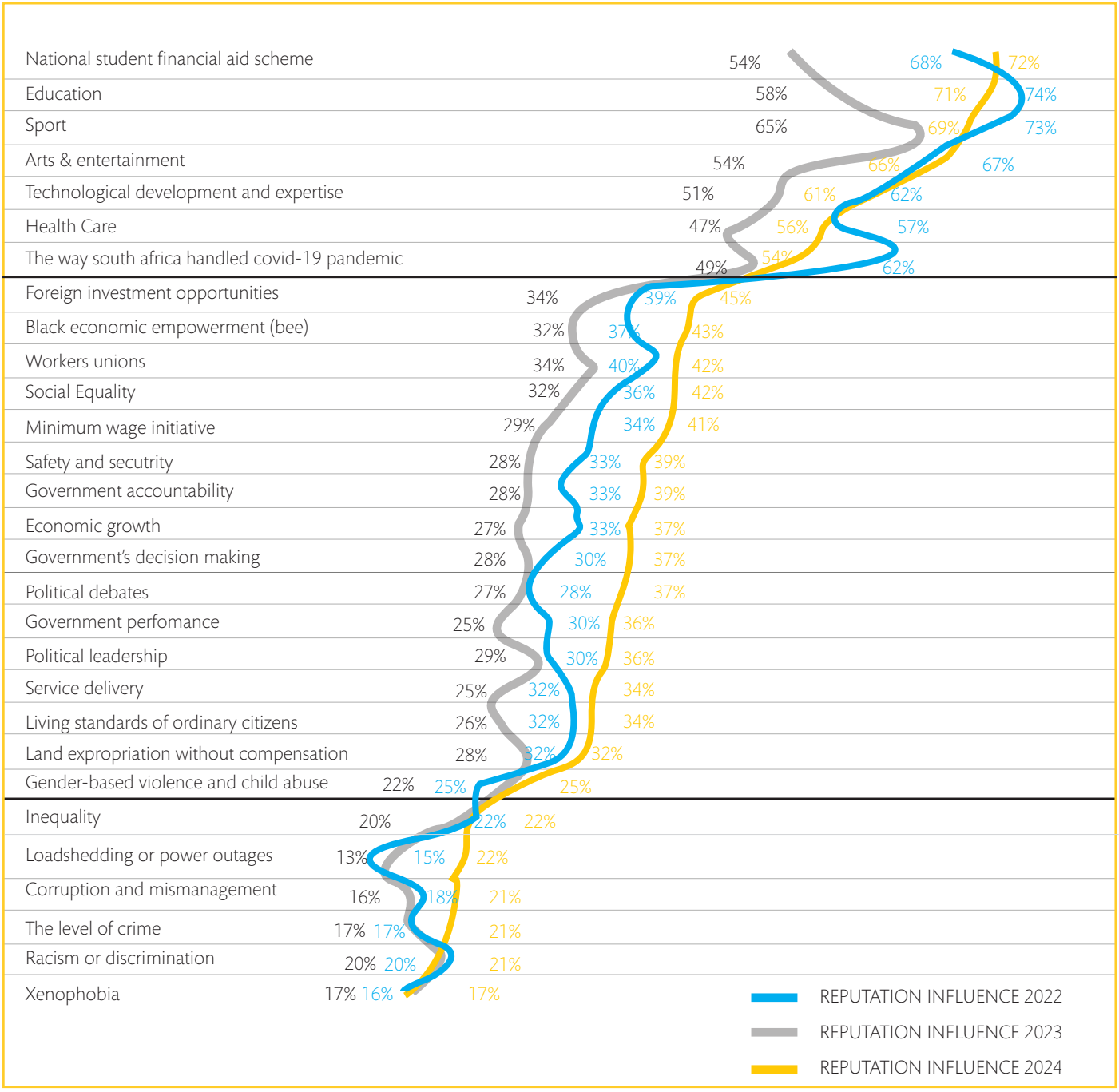
6.2 Consolidating Trust: Government Accountability, Economic Confidence, and Addressing Perception Challenges

Trust in South Africa's institutions and national trajectory has undergone a marked shift between 2022 and 2024, shaped by electoral dynamics, coalition governance developments, and public sentiment. The data from reveals how different societal touchpoints either bolster or erode the reputation of the Nation Brand reflecting both enduring trust anchors and persistent vulnerabilities.

2023 marked a reputational trough, coinciding with heightened uncertainty ahead of national elections. This period saw a contraction in positive sentiment across most indicators, underscoring widespread disillusionment with governance and service delivery.

In 2024, following the formation of the Government of National Unity (GNU), public sentiment rebounded sharply across most institutional and social trust indicators. The pattern reveals a public eager for reform and highly responsive to political transitions that signal inclusivity, transparency, and collective leadership. Importantly, this surge in positive sentiment is driven more by hope and expectation than by demonstrable improvements on the ground.

Figure 4: Ranking of influencers on the reputation of South Africa (higher scores mean positive influence)



Source: Brand SA: State of the Nation Report 2024

The implementation of economic reforms and the recent establishment of the Government of National Unity (GNU) in 2024 has ushered in a period of renewed public confidence and optimism. Citizens are re-engaging expressing a stronger belief in the country's capacity for renewal. This is evident in the significant rise in positive sentiment across key institutional dimensions of governance and the economy. Public confidence in government accountability increased to 39% in 2024, up from 28% in 2022. Similarly, trust in political leadership rose to 36% (from 26%), while confidence in economic growth prospects climbed to 37% (up from 27%). These upward shifts suggest that the GNU has opened a reputational window one marked by renewed hope in South Africa's political and economic stewardship.

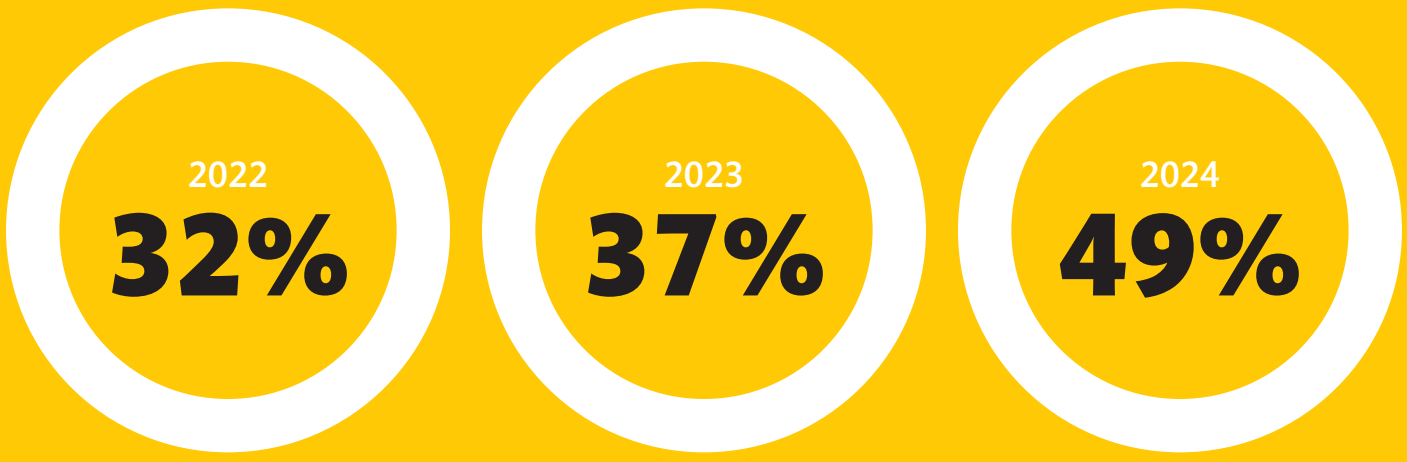
However, these gains remain perceptual and aspirational. The data indicates that South Africans are not merely optimistic by default they are extending trust with the expectation that meaningful delivery will follow. This presents both an opportunity and a responsibility for government and institutions to validate this renewed trust through visible, measurable progress. At the same time, the data also highlights that certain perceptions continue to act as reputational disablers, even within this broader recovery. Specifically, perceptions related to crime (21%), corruption and mismanagement (21%), loadshedding and energy insecurity (22%), xenophobia and social divisions (21%), as well as gender-based violence and child abuse (26%), remain among the least positively rated indicators. These are not signs of systemic distrust but rather reflect long-standing public concerns that continue to shape domestic sentiment and international perceptions.

For the Nation Brand, it is critical to note that these areas not weaknesses, but as priorities for reform challenges that the GNU has the political capital and mandate to address decisively. Encouragingly, several targeted interventions are already in motion. The Energy Action Plan is being fast-tracked to improve supply reliability and reduce dependency on aging infrastructure. Anti-corruption mechanisms including lifestyle audits, prosecutorial reform, and greater public sector oversight are being institutionalized. Law enforcement and safety initiatives are gaining traction, while programmes addressing xenophobia and gender-based violence are being elevated within national social cohesion frameworks. This alignment of political transition, public expectation, and reform ambition presents a critical reputational inflection point for South Africa. Trust is rising, but expectations are higher. The moment must be seized to shift from reputational recovery to performance legitimacy where perception gains are cemented through policy delivery, institutional effectiveness, and citizen impact. For Brand South Africa, the narrative is clear: a nation on the move, reforming with intent and rebuilding confidence through action.

6.3 Perceptions of Life Since Democracy

Is life better since becoming a democracy in 1994? In 2022, the country was at a low point with a score of 32%. Since then, the year-on-year performance of this indicator improved. Following the elections in 2024 and the subsequent establishment of the GNU, the score improved to 49%. The substantial improvement can be directly translated into a maturing democracy.

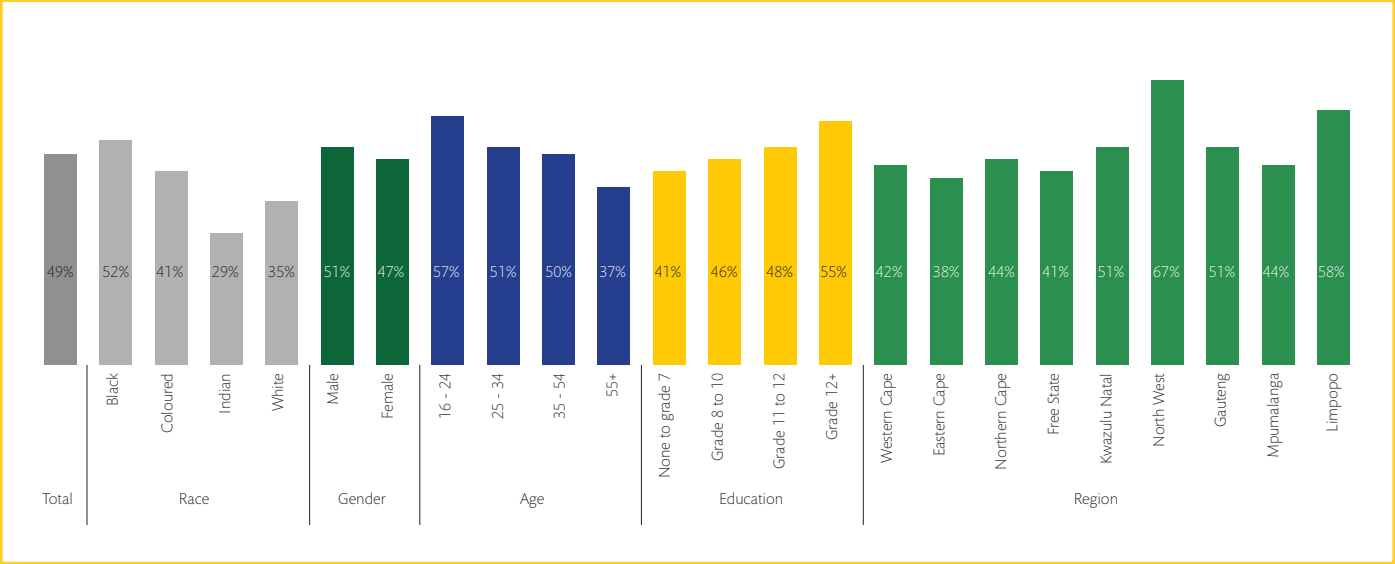
Table 1: Comparative trend in sentiment about life being better since becoming a democracy



Source: Brand SA: State of the Nation Report 2024

The 2024 data reveal meaningful variations in national sentiment across demographic, educational, and regional lines. While the national average sits at 49%, the levels of optimism differ significantly when segmented by race, age, education, and geography offering important cues for targeted engagement and messaging. Provincial sentiment varies widely. North-West (67%) and Limpopo (58%) report the highest optimism levels, followed by KwaZulu-Natal and Gauteng (both 51%). In contrast, the Northern Cape (38%) and Eastern Cape (42%) are below the national average, suggesting regional disparities in how citizens experience governance, economic opportunity, or social development. Black South Africans report above-average optimism (52%), while Coloured (41%), Indian (29%), and White respondents (35%) reflect lower levels of positive sentiment. These differences may reflect varying lived experiences with socio-economic inclusion, public service delivery, or perceived progress.

Figure 5: Demographic profile of those who believe life is better since becoming a democracy



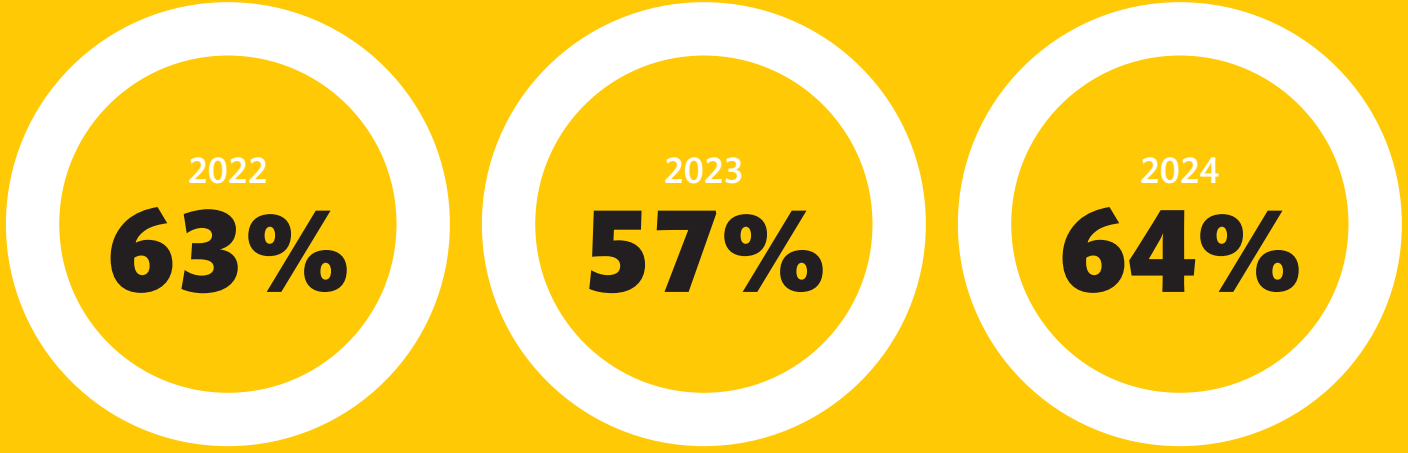
Source: Brand SA: State of the Nation Report 2024

Gender-based responses are even, with women (51%) slightly more optimistic than men (47%). Younger South Africans demonstrate the highest levels of positivity, with 57% of 16–24-year-olds expressing optimistic views as a signal of generational hope and future orientation. Optimism gradually decreases with age, reaching 37% among those over 55, which may reflect greater scepticism formed over time or unmet expectations. A clear pattern emerges across education levels. Optimism rises steadily with educational attainment from 41% among those with no formal schooling to 46% (Grade 8–10), 48% (Grade 11–12), and peaking at 55% for those with post-matric qualifications. This trend suggests that higher education may enhance individuals' access to information, sense of agency, and belief in the country's potential making them more likely to engage positively with national development narratives.

6.4 Sentiments about Reaching Out to Others

Willingness to engage with strangers serves as a valuable indicator of social interaction and a key dimension of social cohesion. In 2018, this measure stood at 67%, reflecting a moment of collective realization about the country's recent past and a sense of solidarity. During the height of the COVID-19 pandemic, particularly in 2021, acts of mutual support helped sustain this engagement, but the trend declined thereafter dropping to 63% in 2022 and reaching its lowest level of 57% in 2023. This decline suggests that during times of heightened stress and uncertainty, people tend to withdraw into familiar social circles. In 2024, following the elections and the formation of the GNU, the willingness to reach out improved modestly, though not as sharply as other indicators. This pattern reinforces a key insight that when citizens feel vulnerable or uncertain, they are less likely to initiate new connections even as broader national sentiment begins to shift in a more hopeful direction.

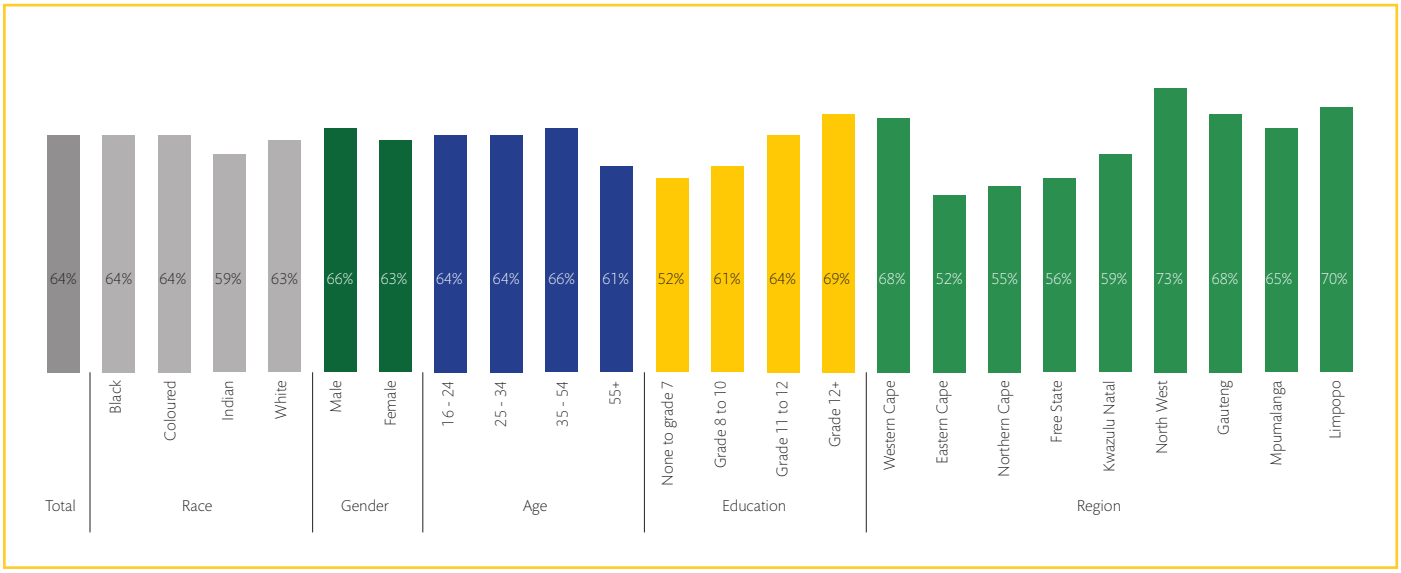
Table 2: Comparative sentiments about reaching out to others (the higher the score, the more likely to reach out)



Source: Brand SA: State of the Nation Report 2024

There are notable variations at the provincial level in responses to this indicator. While the national average reflects a relatively strong willingness to engage, provincial scores reveal differing levels of social openness. This suggests that willingness to reach out is shaped less by broad ideological constructs such as democracy and more by immediate lived realities. In contexts where trust, safety, or social mobility are constrained, individuals may adopt a more cautious or self-protective stance. Conversely, higher provincial scores may reflect environments where interpersonal trust and community engagement are actively nurtured.

Figure 6:Demographic profile of those willing to reach out to engage with others



Source: Brand SA: State of the Nation Report 2024

North-West emerges as the most engaged province, with 73% % of respondents expressing a readiness to connect with others. This suggests a socially cohesive environment where community bonds are strong and interpersonal trust is high. Limpopo follows closely at 70 %, highlighting a deeply rooted culture of communalism and traditional social structures that continue to support engagement across differences. Gauteng, the country's economic hub, records a high engagement score of 68%. This is particularly notable given the province's scale, diversity, and urban complexity. The score points to a growing sense of civic awareness and a willingness to build bridges across demographic and socio-economic divides. Mpumalanga (65 %) and KwaZulu-Natal (59 %) reflect moderate yet positive engagement levels, suggesting the presence of community-based networks and collective identity, even amid ongoing structural challenges.

In contrast, the Western Cape registers a more reserved score of 61 %, marginally below the national average. While still reflective of moderate trust levels, it may indicate lingering divides rooted in historical spatial and economic inequalities. Free State (56 %) and Northern Cape (55 %) show lower levels of willingness to engage, possibly due to economic marginalization or limited access to inclusive platforms for interaction. Eastern Cape records the lowest engagement score at 52 %, indicating a potential erosion of trust in social and institutional frameworks. This may be shaped by historical patterns of outmigration, service delivery gaps, or deep-rooted socio-economic disparities.

Further disaggregating the data across race, gender, and age reveals subtle yet important nuances that deepen our understanding of social engagement dynamics in the country. Across racial groups, the scores are largely consistent, with Black, Coloured, and Indian respondents all recording 64 %, while White South Africans register slightly higher at 66 %. This relative uniformity suggests that race is not a dominant differentiator when it comes to interpersonal willingness to engage, pointing instead to a shared behavioural pattern that transcends racial lines. It stands in contrast to more value-laden constructs such as attitudes toward democracy or perceptions of government performance, where historical and structural factors typically drive greater divergence.

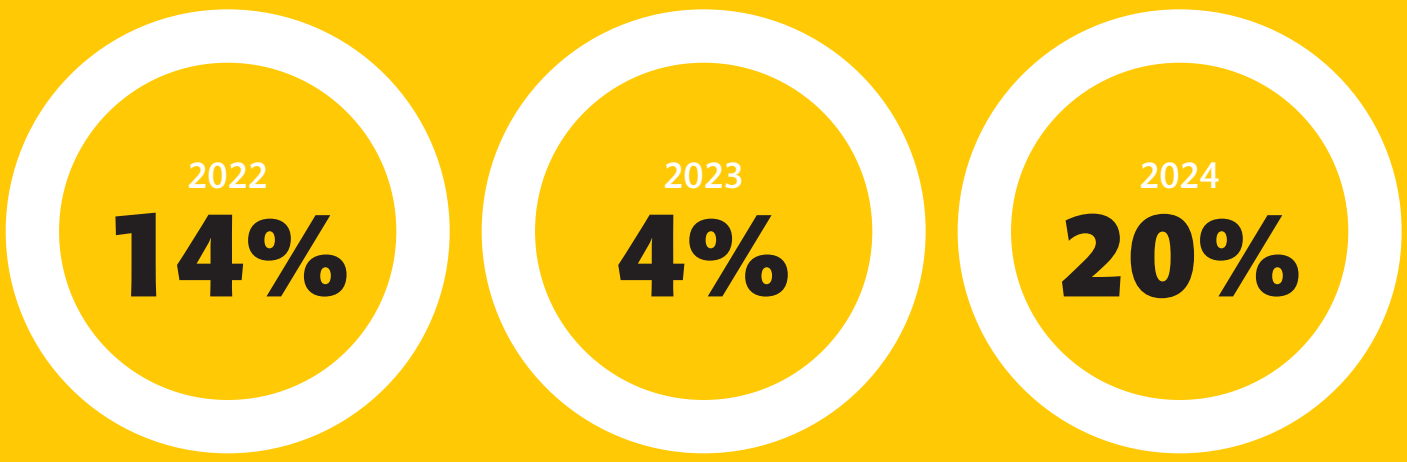
Willingness to reach out. While the gap is small, it may reflect broader patterns of gendered socialization, public safety concerns, or differing roles in community networks. Women's slightly lower engagement scores could also be influenced by persistent perceptions of vulnerability or exclusion in certain public spaces. The age profile reveals an encouraging level of consistency, with the youth (16 to 24 years) and older adults (55 years and above) both reporting engagement levels at 64 and 61 % respectively, and those in the middle age bands (25 to 54 years) hovering around 64 to 66 %. The absence of significant age-based fluctuation indicates a broadly shared disposition across generations to participate in the social sphere. However, the marginally lower score among older respondents may point to more cautious engagement habits shaped by long-term exposure to socio-political instability or a heightened sense of personal risk.

Willingness to engage is not uniformly distributed and is often influenced by local dynamics lived experiences, and the strength of community networks. Understanding these nuances is essential for tailoring social cohesion initiatives and messaging strategies that resonate with regional realities while reinforcing the collective vision of a more unified and connected South Africa.

6.5 Sentiments about the willingness to pay Taxes

The year 2023 marked a low point in public sentiment ahead of the elections. In contrast, the 2024 results show that individuals with higher levels of education are more likely to support the democratic system including contributing through taxes which correlates with their higher levels of formal employment and tax participation.

Table 3: Comparative trend in sentiment about the willingness to pay taxes (The higher the score, the more willing)



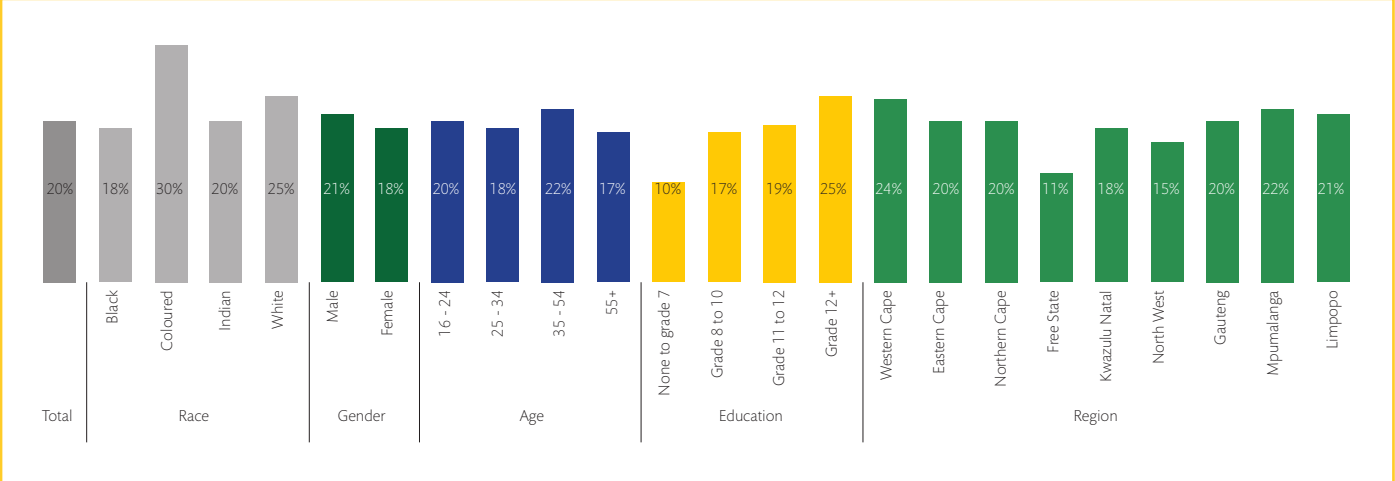
Source: Brand SA: State of the Nation Report 2024

Willingness to pay taxes is a critical indicator of civic trust and belief in the social contract. At a national level, only 20 % of South Africans report a willingness to contribute through taxes. This is a modest figure that underscores broader public concerns around accountability, value for money, and the perceived effectiveness of public institutions. While this suggests a fragile trust base as a result of historical reported financial mismanagement and poor service delivery.

Across racial groups, the most notable difference emerges from Coloured South Africans, 30 % of whom indicate a willingness to pay taxes this is significantly above the national average. This is followed by White respondents at 25 %, Indian respondents at 20 %, and Black respondents at 18 %. These variances may be linked to historical tax base inclusion, differing perceptions of government efficacy, and the uneven visibility of public services across communities. Age-based patterns show that the working-age population expresses a marginally higher willingness to pay taxes, with 22 % among those aged 25 to 34 and 20 % among those aged 35 to 54. Younger respondents (16 to 24) report 19 %, while those 55 and older drop slightly to 17 %. The data suggest that those actively participating in the economy are more willing to contribute, while younger and older cohorts may either feel disempowered or disconnected from the fiscal process.

Education, however, emerges as a particularly strong predictor of tax sentiment. Only 10 % of respondents with no formal education indicate willingness to pay, rising progressively through the education spectrum to 17 % among those with Grade 8 to 10, 19 % among Grade 11 to 12, and peaking at 25 % for those who have completed matric or higher. This reflects a clearer understanding of the role taxes play in governance and development, affirming the need for targeted civic education efforts to bolster tax morale and public trust.

Figure 7: Demographic profile of those who are willing to pay more taxes



Source: Brand SA: State of the Nation Report 2024

A deeper analysis at a provincial level reveals meaningful patterns that can inform strategic messaging and civic engagement. The Western Cape (25 %) and Eastern Cape (24 %) lead the country, suggesting either a higher level of perceived government responsiveness or a stronger cultural norm around civic contribution. Mpumalanga (22 %) and Limpopo (21 %) also score above the national average. Gauteng (20 %), despite being the country's most economically active province, reflects average levels of willingness, which may be indicative of growing public frustration with the disconnection between contribution and visible return.

On the lower end, North-West (15 %) and Free State (11 %) report the weakest willingness to pay taxes, likely reflecting localized dissatisfaction with governance and limited public investment.

KwaZulu-Natal (18 %) also falls below the national average, suggesting there is room to rebuild confidence in the developmental value of taxation in the province.

Taken together, these findings suggest that willingness to pay taxes remains highly sensitive to public perceptions of institutional trust, service delivery outcomes, and the broader societal return on civic contribution. Building a culture of tax compliance will require not only financial enforcement but also a clear demonstration that contributions lead to tangible improvements in people's lives. Making that connection visible through improved delivery, transparency, and accountability is critical to restoring belief in the social contract and strengthening national unity.

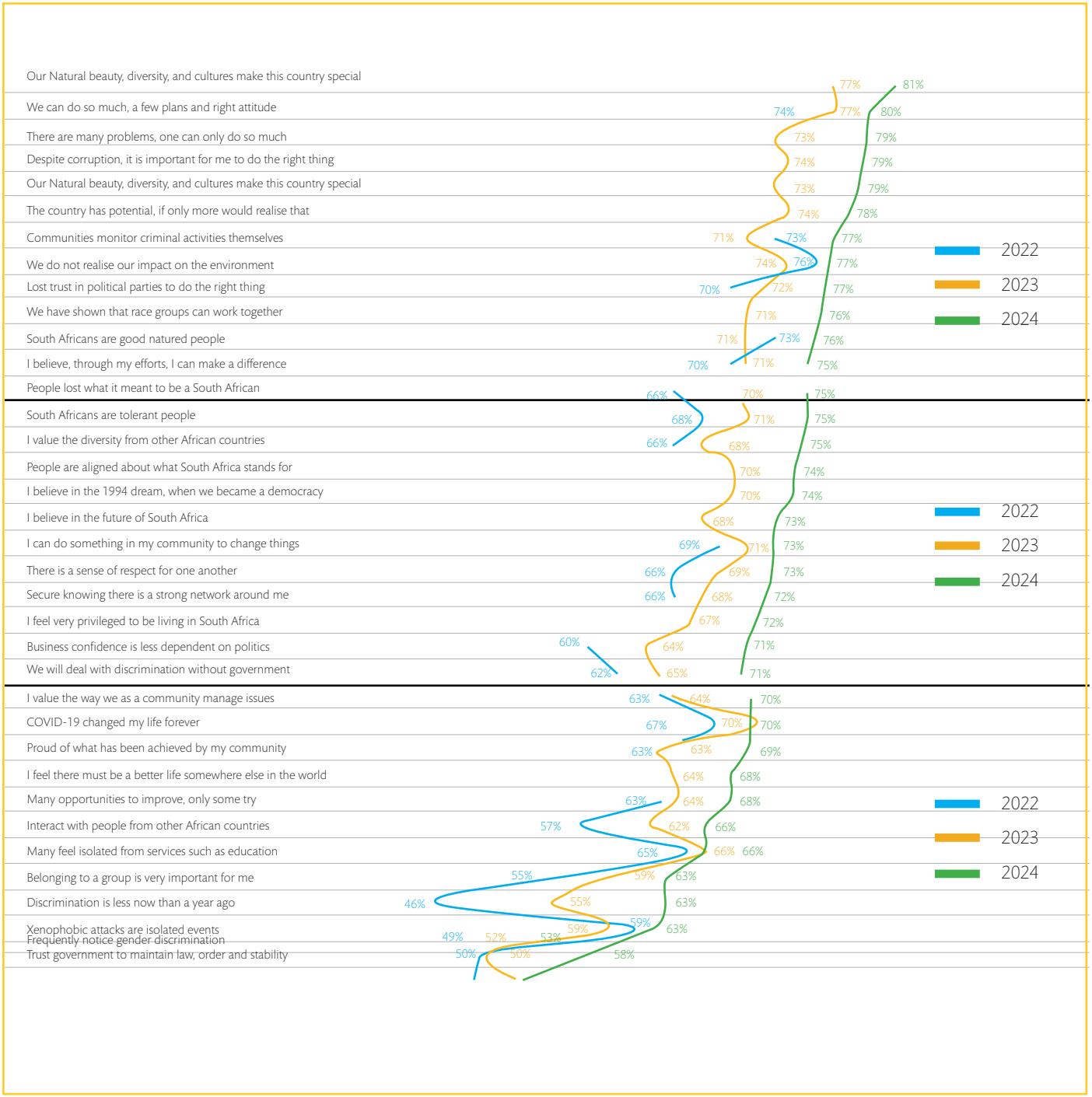
6.6 Comparative community engagement and sentiments analysis

The 2024 data reveal a marked rebound in public sentiment across several community-based and civic-oriented indicators. This signals a renewed willingness among South Africans to engage constructively with their society and suggests a deeper recalibration of trust, identity, and shared purpose following a prolonged period of political uncertainty and social fatigue.

Across the majority of indicators, sentiment in 2024 shows a significant upswing compared to the past two years, most notably in statements related to personal agency, identity, and social cohesion. Phrases like "We can do so much, a few plans and the right attitude" (up to 80 % from 77 % in 2023 and 74 % in 2022) and "Despite corruption, I need to do the right thing" (now 79 %) highlight a growing sense of responsibility and proactive citizenship. These shifts are not necessarily a result of direct improvements in lived experience but rather reflect a shift in public outlook that is a recalibrated optimism grounded in collective effort and potential. Sentiments around personal efficacy, national character, and shared belonging have also strengthened meaningfully. For example, "I believe, through my efforts, I can make a difference" rose to 76 % in 2024, while "People lost what it meant to be a South African" dropped significantly, with positive sentiment rebounding to 75 %. These indicators suggest that South Africans are once again starting to draw strength from their national identity and shared values.

Importantly, sentiments that reflect broader societal unity have also improved. "South Africans are tolerant people" and "People are aligned with what South Africa stands for" both climbed to 75 %, reflecting growing ideological cohesion. "I believe in the future of South Africa" reached 74 %, reinforcing the notion that optimism is no longer abstract however it is becoming a shared and strategic societal orientation.

Figure 8: Comparative community engagement and sentiments analysis (the higher the score, the stronger the sentiment)



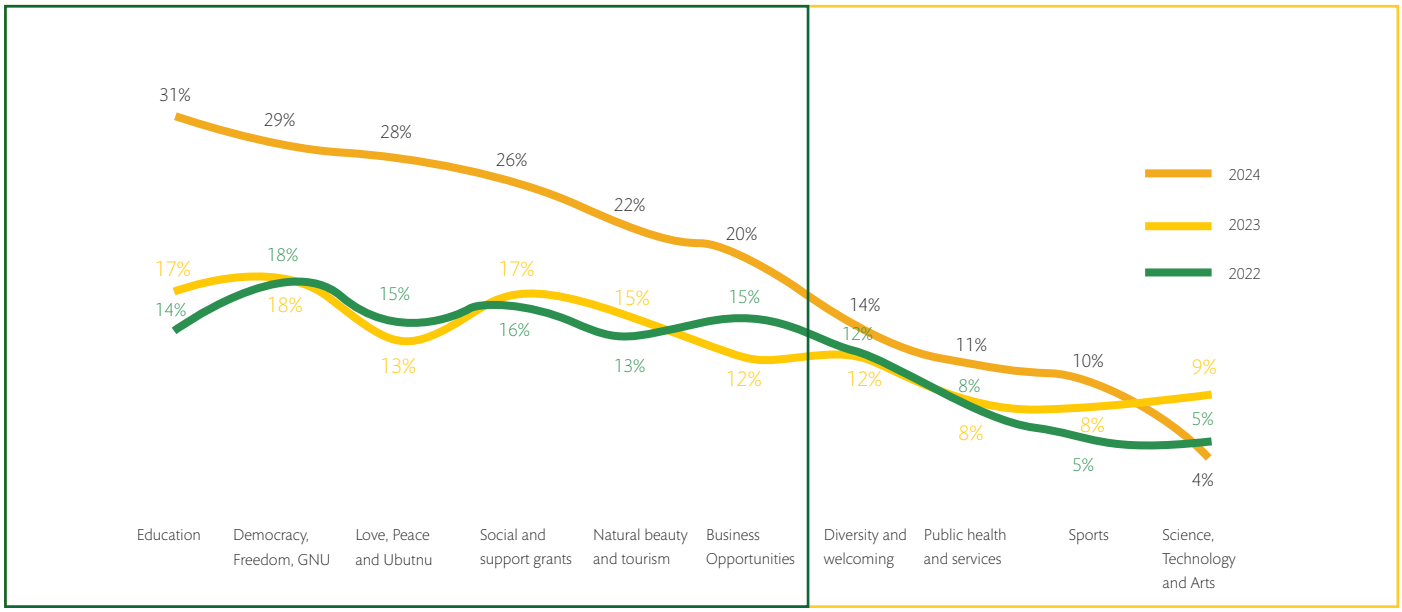
Source: Brand SA: State of the Nation Report 2024

From figure 9 above it is important to note that sentiments that reflect broader societal unity have also improved. "South Africans are tolerant people" and "People are aligned with what South Africa stands for" both climbed to 75 %, reflecting growing ideological cohesion. "I believe in the future of South Africa" reached 74 %, reinforcing the notion that optimism is no longer abstract rather it is becoming a shared and strategic societal orientation.

This recovery in sentiment is particularly striking when viewed in contrast to 2023, a year marked by pre-election anxiety, weakened institutional trust, and low public morale. The data suggests that the establishment of the Government of National Unity (GNU) in 2024 has contributed to a psychological shift. Citizens now express greater faith in collective problem-solving, as reflected in the rise of indicators like "Business confidence is less dependent on politics" (up from 60 to 71 %), and "We will deal with discrimination without government" (up to 71 %).

These responses indicate a more active civic posture, underpinned by a renewed belief in societal agency which is bolstered by perceived national progress as highlighted in Figure 9 below.

Figure 9: Positive aspects in South Africa and how these have changed over time



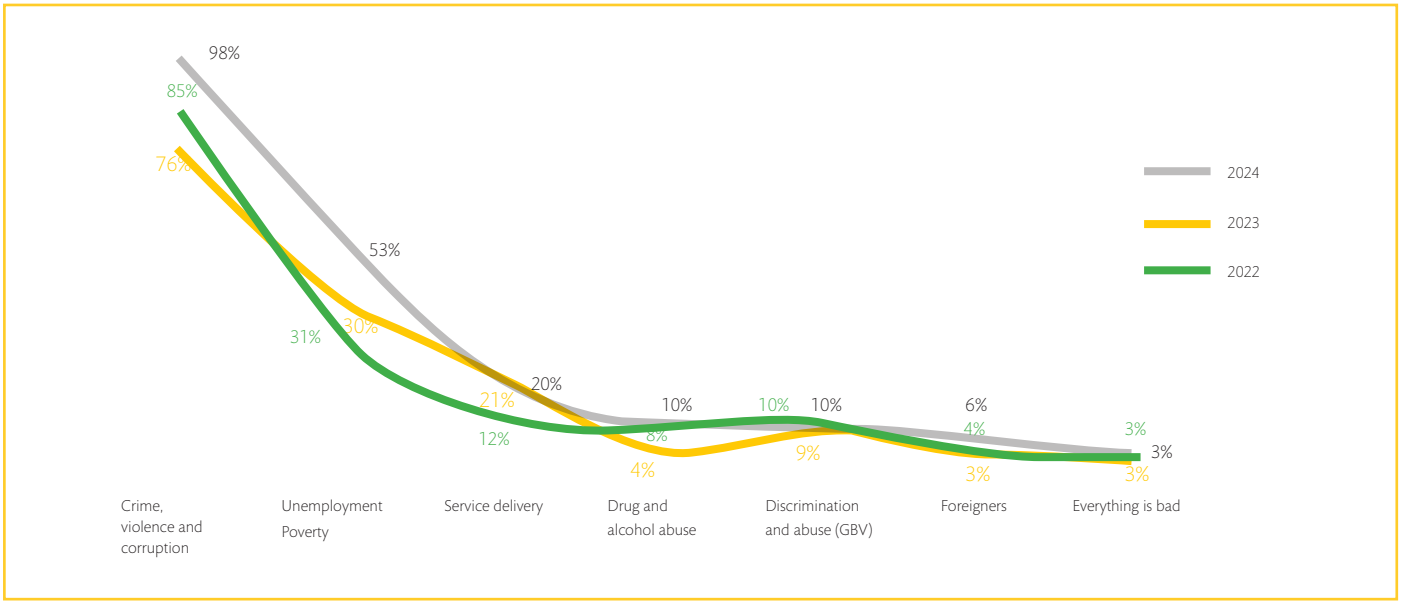
Source: Brand SA: State of the Nation Report 2024

The 2024 data illustrate a noteworthy shift in how South Africans perceive the positive aspects of their country, reflecting a maturing and more pragmatic public sentiment. Rather than focusing primarily on symbolic achievements or episodic national pride, citizens are increasingly prioritizing foundational, values-driven enablers of progress such as education (31%), democracy and freedom (29%), and social protection (26%). These are no longer seen merely as ideals, but as practical levers for dignity, equity, and shared development. While this upward trend is encouraging, the overall sentiment levels across many of the categories remain modest. Areas such as science and technology (4%), public health (11%), and sports (10%). The data does not suggest that pride in sport, innovation, or creative excellence has diminished in meaning but rather that these now sit within a broader ecosystem of expectations. In a country still working to overcome inequality and social fragmentation, recognition is increasingly given to those facets of national life that foster inclusion, dignity, and empowerment.

This recalibration of national optimism is meaningful. It reflects a discerning public that is moving beyond surface-level celebrations, and toward a deeper evaluation of lived realities. The rise in these key indicators suggests an electorate that is invested in long-term progress and the strengthening of institutions that deliver public good. This shift in perception is not a departure from traditional sources of national pride, but rather an evolution of them. It reflects an electorate that is more discerning, more attuned to issues of justice, equity, and opportunity, and more invested in the role of governance and institutions in enabling dignity for all. The emphasis on structural enablers from access to learning, to inclusive leadership, to the moral cohesion embodied in Ubuntu suggests a society that is not only hopeful, but intentional about the kind of country it wants to become. In this context, Brand South Africa is presented with a unique opportunity to reposition the Nation Brand narrative in ways that resonate deeply with the citizen experience. This emerging sentiment calls for storytelling that reflects authenticity, accountability, and ambition aligning the symbolic value of South Africa with the substance of its development trajectory.

Ultimately, the 2024 findings are a testament to the enduring optimism of South Africans, tempered by an insistence on delivery and underpinned by a reawakened belief in possibility. It is this intersection of realism and aspiration that defines the new national psyche, one in which pride is earned, trust is conditional, and hope is grounded in the tangible.

Figure 10: negative aspects in South Africa and how these have changed over time



Source: Brand SA: State of the Nation Report 2024

At the forefront of public concern, crime, violence, and corruption continue to dominate, with 93% of respondents citing them as the most pressing issues, a significant and consistent increase from 76% in 2023 and 85% in 2022. This escalation highlights a deepening anxiety around personal and community safety and a growing expectation for institutional accountability. Similarly, unemployment and poverty also follow a concerning upward trajectory, rising from 31% in 2022 to 40% in 2023, and reaching 53% in 2024. While other parts of the study indicate improving economic sentiment, this steady rise suggests that many citizens are yet to feel the benefits of macroeconomic recovery in their everyday lives. Service delivery, while cited by a lower proportion of respondents, remains a persistent concern. It rose from 12% in 2022 to 21% in 2023 and held at 20% in 2024. This consistency points to ongoing dissatisfaction with local governance and the delivery of basic services a crucial touchpoint in the daily interaction between citizens and the state.

Concerns around drug and alcohol abuse have increased above 2022 levels at 10 %, after dropping to 4% in 2023. This suggests a resurgence of concern, possibly linked to increased visibility or awareness of its effects on communities. Meanwhile, perceptions around gender-based violence and discrimination have remained stable, at 10% in both 2022 and 2024, and 9% in 2023 an indication of enduring social issues that continue to demand urgent attention. Smaller but notable increases are seen in perceptions around foreigners, with responses rising from 3% in 2023 to 6% in 2024, and in concerns from those who feel that "everything is bad," which has remained steady at 3% across all three years. While these figures are relatively low, they reflect underlying tensions and a segment of the population still grappling with broader disillusionment.

Altogether, the data reflects a public that is aware, engaged, and increasingly focused on practical outcomes over symbolic gestures. For the Nation Brand, this presents both a reputational risk and a strategic opportunity to not only communicate progress but to ensure that it is felt tangibly, visibly, and fairly across all communities

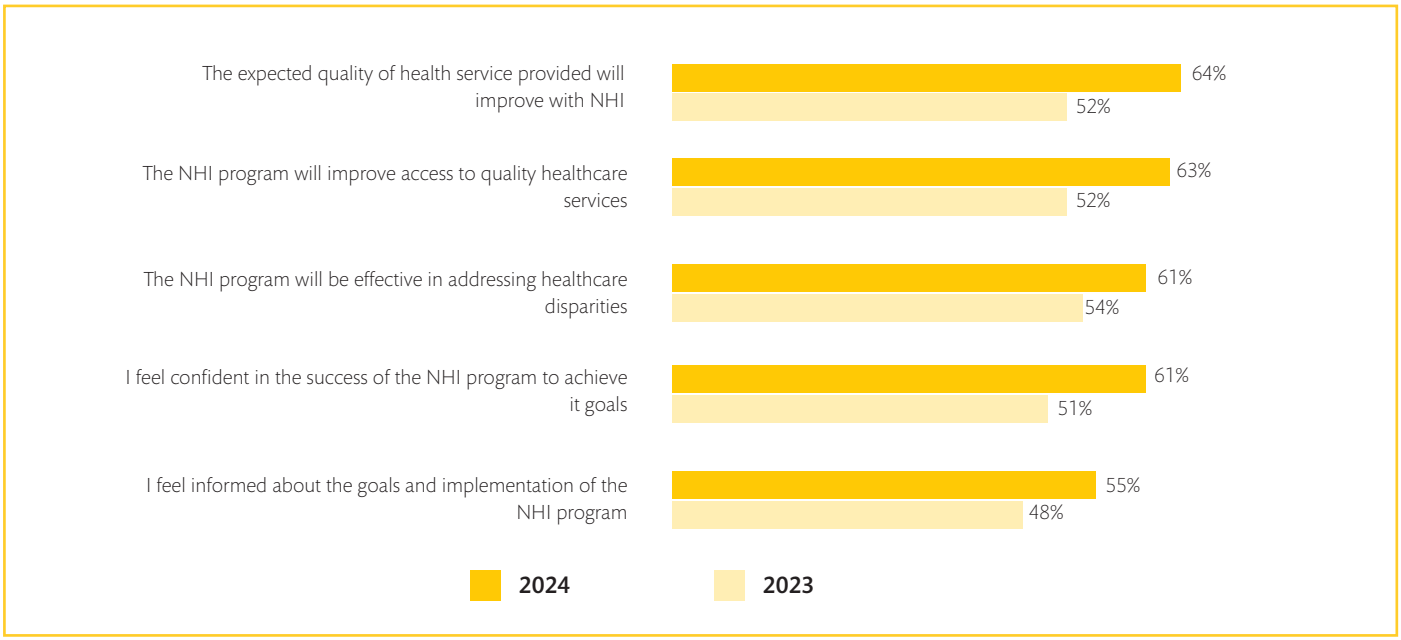
7. National Health Insurance

The National Health Insurance (NHI) plan has been a controversial initiative with many criticising the idea that all should contribute a little to look after the health needs of everyone. In a recent analysis the point was made that should private and public sector healthcare be evened out neither would have enough cash per person to provide meaningful healthcare. This does not mean the NHI plan should not go ahead, in fact it is a critical aspect of the South African national landscape that it does go ahead. The funding of it is the major concern. It has been stated that VAT would need to increase by at least 6% to generate the cash needed to fund NHI, an impossible suggestion given the current and past decade economic performance.

Healthcare requires a large portion of the national budget, yet many provincial and other health facilities are struggling to provide sufficient services. On the other hand, many agree that it is the only way to bring health care to the poor as a very small %age of society currently have access to sufficient care. There is definitely more communication needed from government to lay aside these fears and concerns.

Given that context, the last statement accentuates the lack of communication about the program. Regarding the other aspects the nation was asked about, all indicators are more positive in 2024, very likely given the GNU structure.

Figure 11: Perceptions about the NHI measured over time



Source: Brand SA: State of the Nation Report 2024

It is the discrepancies in health care that are the main motivation. A few years ago, in an interview with a highly specialised medical practitioner, the point was made that almost all doctors focus on a very small portion of the population, the private health market, while the real need is among the millions that do not have access to good quality care. Healthcare professionals are all fighting for space in a small pool, while the need is so great outside the pool. In that sense, the NHI will be a good thing,

The goals of the NHI are endorsed by those who need it most. Those who have access to information about the NHI are different from those who believe in its goals. There are many missing pieces that the public does not yet know or understand to get behind the NHI with conviction and understanding.

8. Economic Perceptions

As discussed in the previous chapter, the reality of affordability of the NHI programme given economic growth over the past decade, raises the controversy of the programme even further. In this section, various aspects of the economy are explored.

A key point is that despite the substantial increase in positive sentiments and renewed confidence in government following the establishment of the GNU, the nation remains concerned and stressed about the state of the economy.

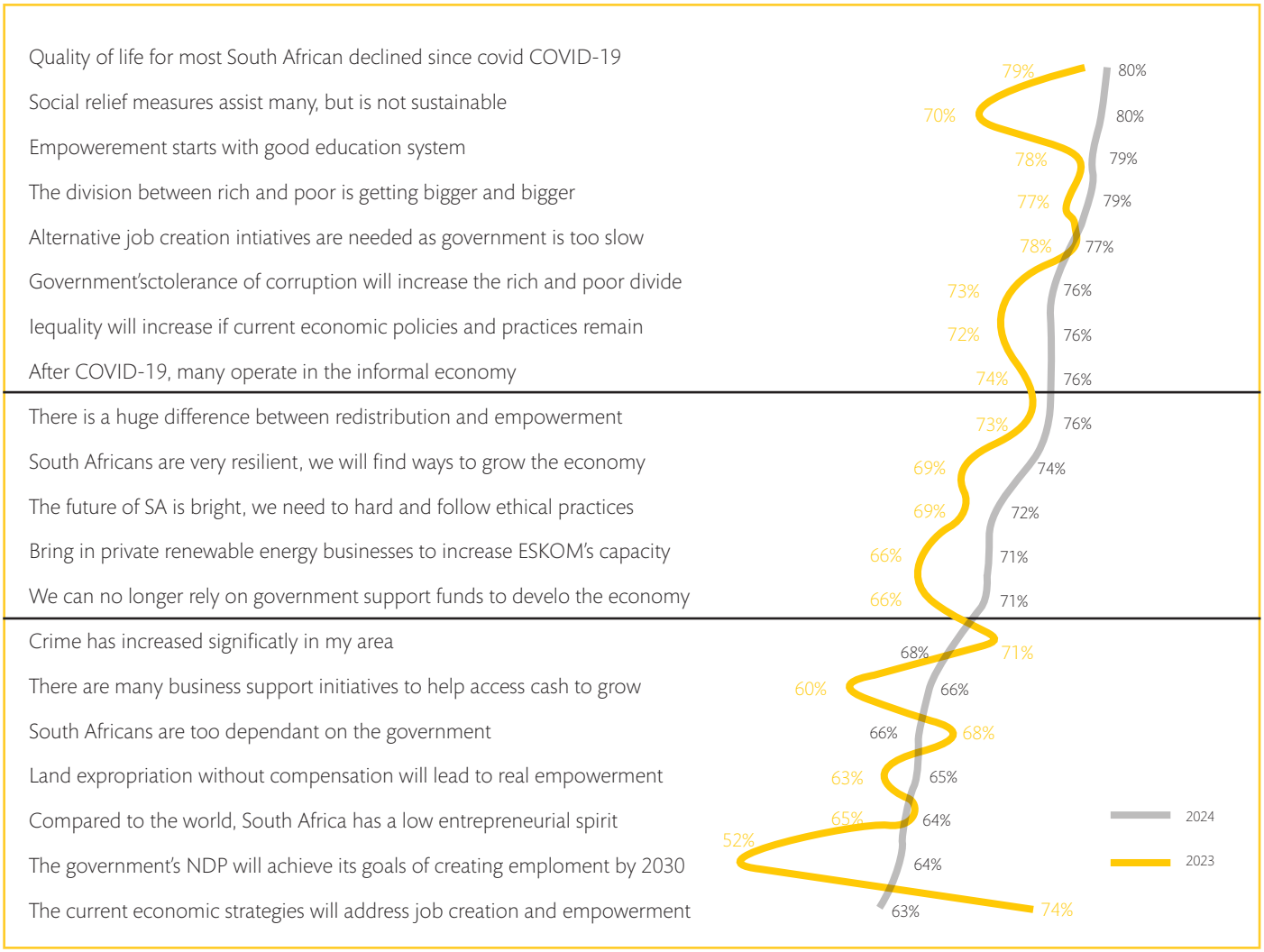
Addressing unemployment and creating jobs may be frequently raised as key aspects to address in speeches and public addresses, however, without economic growth, these pain points will remain muted.

When working through this section, it is clear that the connection between economic growth and addressing unemployment is made. One cannot be solved without the other. Reading through the statements in the graph below paints the picture in three clusters. The first (red) cluster is an expression of the current reality. The most important shift is that the social relief grants are not a sustainable solution. A critical point that was raised in the recent budget discussions.

The second block (blue) considers many of the rhetoric around job creation and economic growth. These statements highlight the perceived inaction of government to address economic growth.

The third block (orange) speaks about the consequences of the lack of economic growth such as increased crime, dependency and a lack of entrepreneurial spirit. The last two statements are very interesting. The first is the renewed hope in the fulfilment of the National Development Plan (NDP) by 2030 under the leadership of the GNU. The second is the connection made that without economic growth, a radical change in the status quo, unemployment cannot be sufficiently addressed.

Figure 12: South Africans' perceptions about the economy

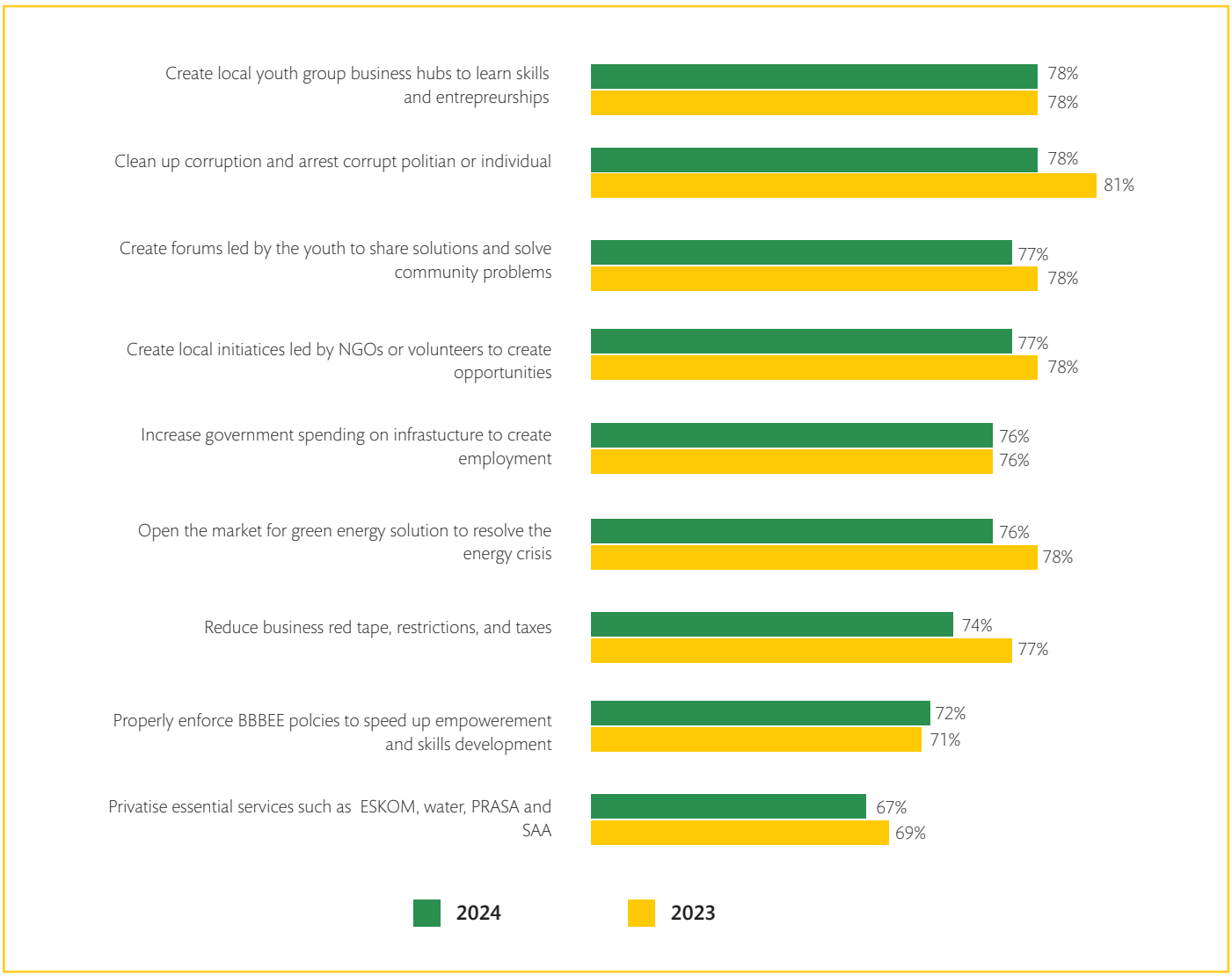


Source: Brand SA: State of the Nation Report 2024

To test the likely solutions, the survey explored possible avenues of growth with particular focus on potential local economic activities. Interesting that despite the renewed confidence in government under the leadership of the GNU, many of these indicators are supported less than in 2023.

Compared to last year, even though the scores are very close with decimal differences influencing rank order, the pattern did not change much.

Figure 13: Suggested solutions to improve economic performance

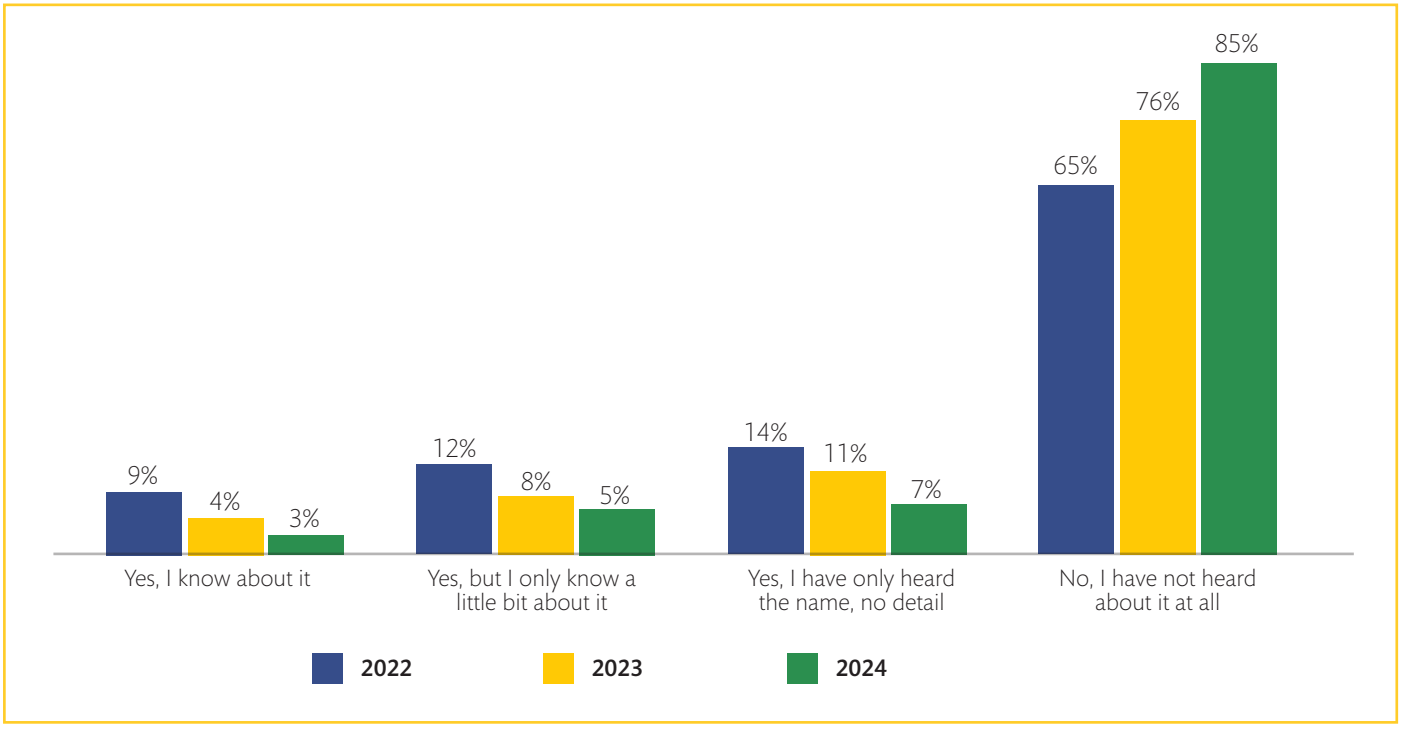


Source: Brand SA: State of the Nation Report 2024

One key difference is that the need to clean up corruption, although a very good thing to do as seen elsewhere, will not result in economic growth. Economic growth will need more than just getting rid of bad apples. The need for an overall strategic focus remains the preferred solution.

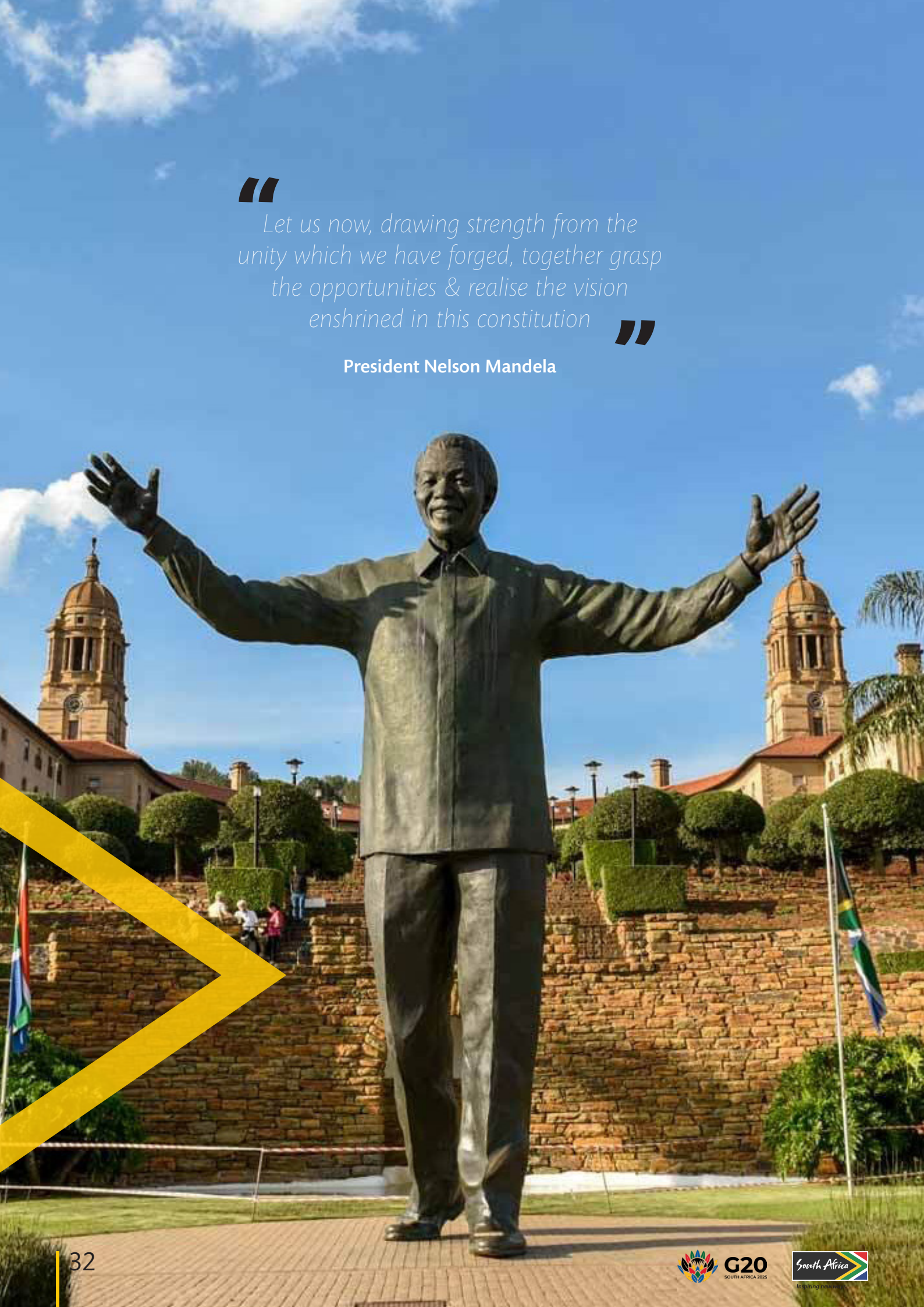
Moving on to trade and particularly the African Continental Free Trade Area (AFCFTA) agreement. It finally seems as if traction is gained on the AFCFTA. The agreement has been in place for some time, and goods are being traded under AFCFTA, but a lot more has to be done to illustrate the practice and gain trust from the market to engage more. But, for the first time, the positive direction of this initiative is noted.

Figure 14 :Awareness of AFCFTA



Source: Brand SA: State of the Nation Report 2024

This concludes the chapter focusing on the economy. The next chapter shifts towards government and the GNU.



"Let us now, drawing strength from the unity which we have forged, together grasp the opportunities & realise the vision enshrined in this constitution"

President Nelson Mandela

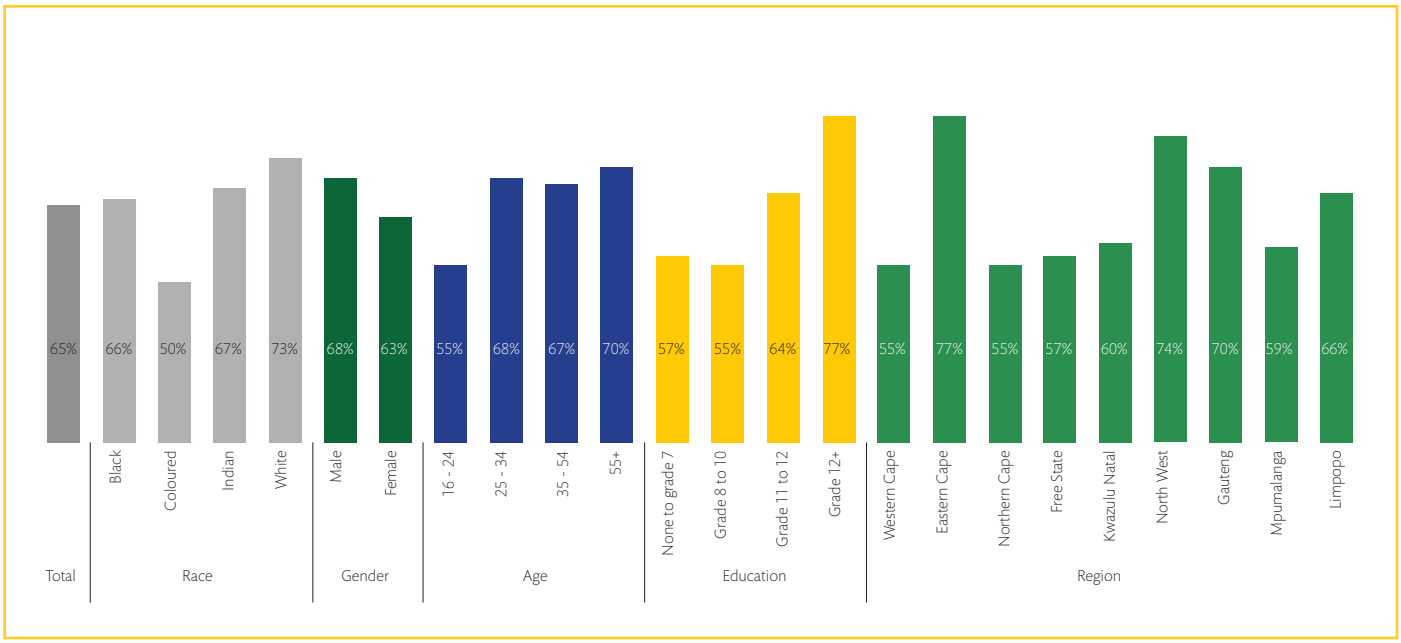
9. The GNU and Government

The general consensus, summarised based on several media reports and interviews between November 2024 and March 2025, is that the GNU is the best possible solution to take the country forward. There has also been reports that the GNU may be threatened and then again that the parties involved in the GNU are doing everything possible to keep it together.

Recent pressure points such as the Land Expropriation Act, the Basic Education Laws Amendment (BELA) Act, the back-and-forth on the budget to agree on a VAT %age increase and the recent expulsion of South Africa's ambassador to the US. There will no doubt be other aspects to challenge the members of the GNU to practice good faith and cooperation.

At the time this survey was conducted in November 2024, the GNU was announced a few months before at the opening of Parliament. At the time, the awareness of the GNU or Government of National Unity was 65%. In a recent monthly survey, it was 85%. The profile of those aware of the GNU is relatively stable. Compare this with the WhatsApp or Facebook profiles towards the end of this report to see that this profile is much more stable, meaning awareness is more evenly distributed.

Figure 15: Awareness of the GNU

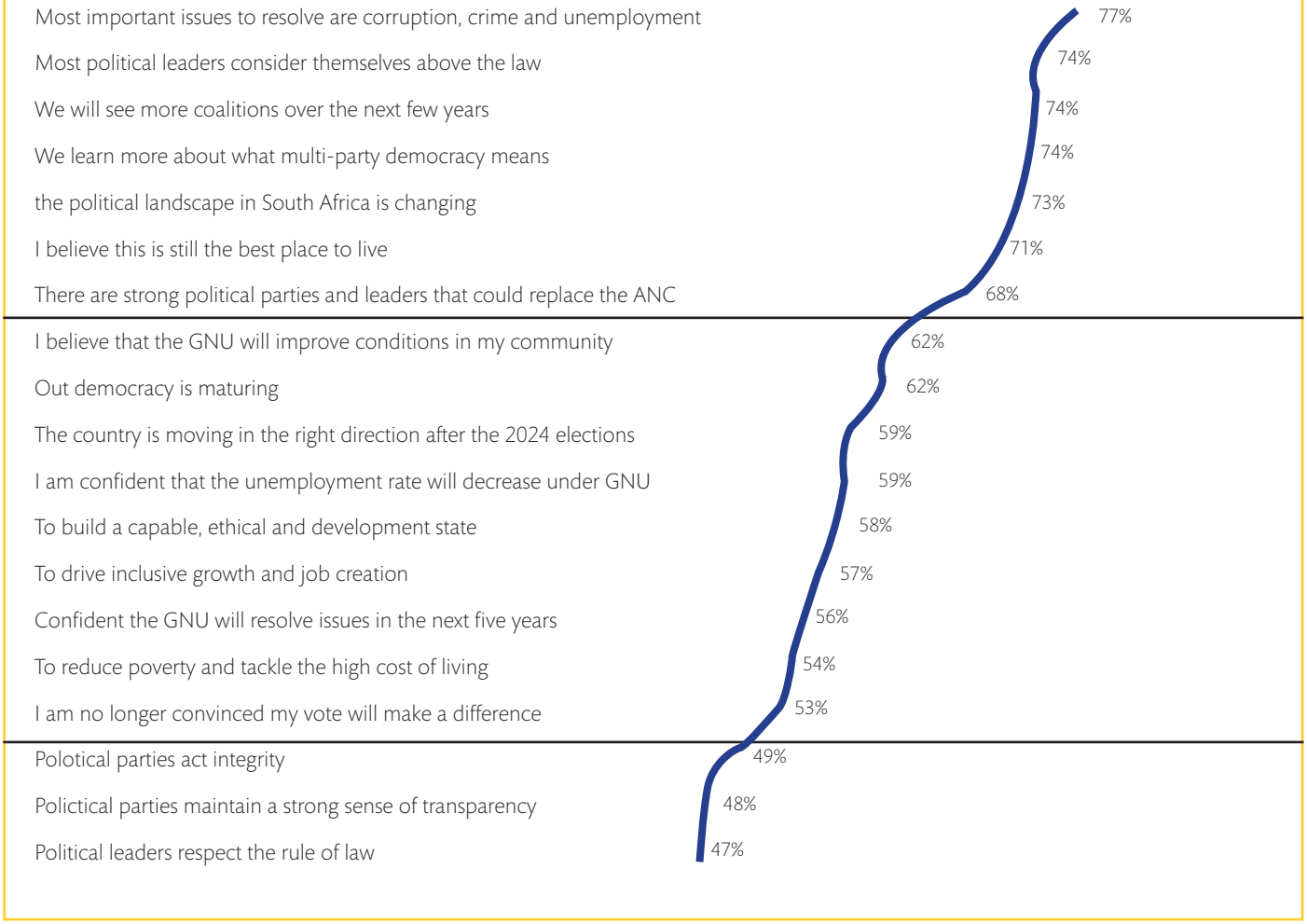


Source: Brand SA: State of the Nation Report 2024

Regarding perceptions about the GNU, political parties, and the role of parties in the GNU, a set of statements were asked. The first block (red) is basically the reasons why people voted in May 2024 – maladministration, political party leaders who think they are above the law, and the political landscape in South Africa is changing. Compare that with the bottom block (light blue) which is that political parties do not act with integrity, nor maintain transparency, and do not respect the rule of law. Between these two sets of statements are the general low performance scores seen for 2023 throughout this report. The sense of feeling unsafe, feeling worried about the future of the country. As discussed in the focus groups, people continue doing what they are doing for their children, to try and give them a better future, even if that means leaving the country.

When the GNU was established, these reasons, in part or in full, were the main reasons for the now greater sense of hope in government. The GNU, where multiple parties keep one another in check, have to work together. Almost ¾ agree that the political landscape is changing and 71% believe that this is still the best place to live.

Figure 16: Rating of the GNU, political parties, and governance in South Africa



Source: Brand SA: State of the Nation Report 2024

The rating of the GNU's performance clearly illustrates the lack of experience and lack of proof of the impact of the GNU a few months after its formation. The scores are not very meaningful at individual level. As a collective, the fact that all statements are rated the same illustrate how little the public have experienced the GNU.

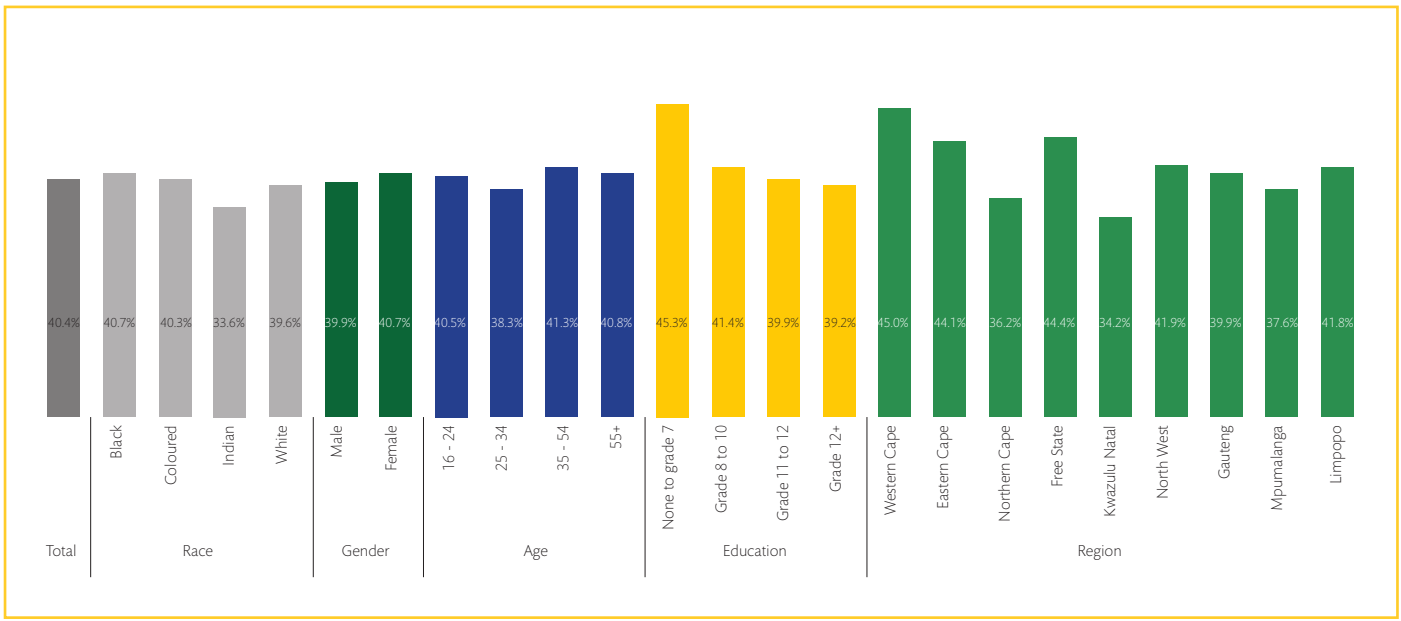
Figure 17: How South Africa inspires the nation

Source: Brand SA: State of the Nation Report 2024

In order to understand if sentiments have shifted after the ANC got less than 50% of the vote, the survey asked what the likely estimate could be that the ANC will get in the next election. The ANC is likely to remain at 40%. Given the optimism seen in this report and the fact that the ANC is still at 40% of the vote, it illustrates the confidence in the GNU rather than the ruling party.

It raises a concern that should the GNU dismantle or change its composition, the hope and confidence expressed in this report, will most likely change.

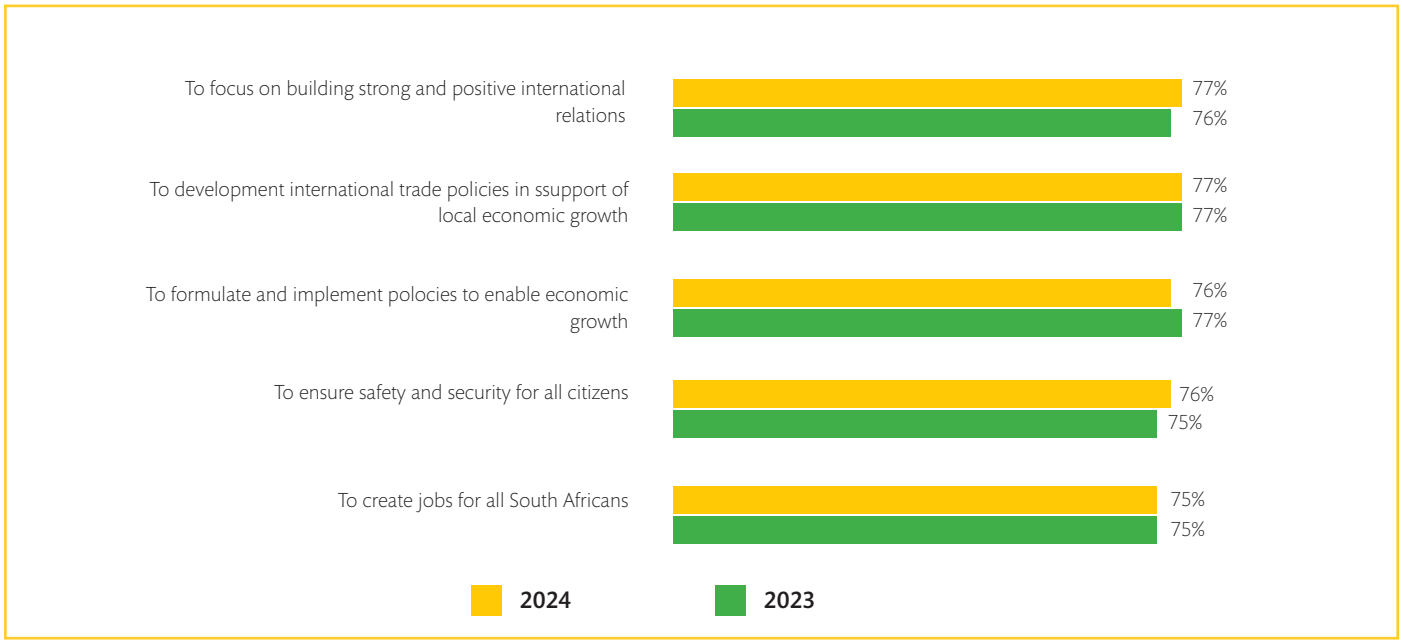
Figure 18: Likely support the ANC will get in the next elections



Source: Brand SA: State of the Nation Report 2024

With the establishment of the GNU, did the expectations of what is the role and function of the government are change? The answer is no. The ratings remain very stable and consistent across all indicators. The first three statements set the stage for the country to continue building its economic networks and opportunities for growth. The final two are expressions of the great need for employment, income, and to build a life for families and households.

Figure 19: Expectations of the role of government under the GNU

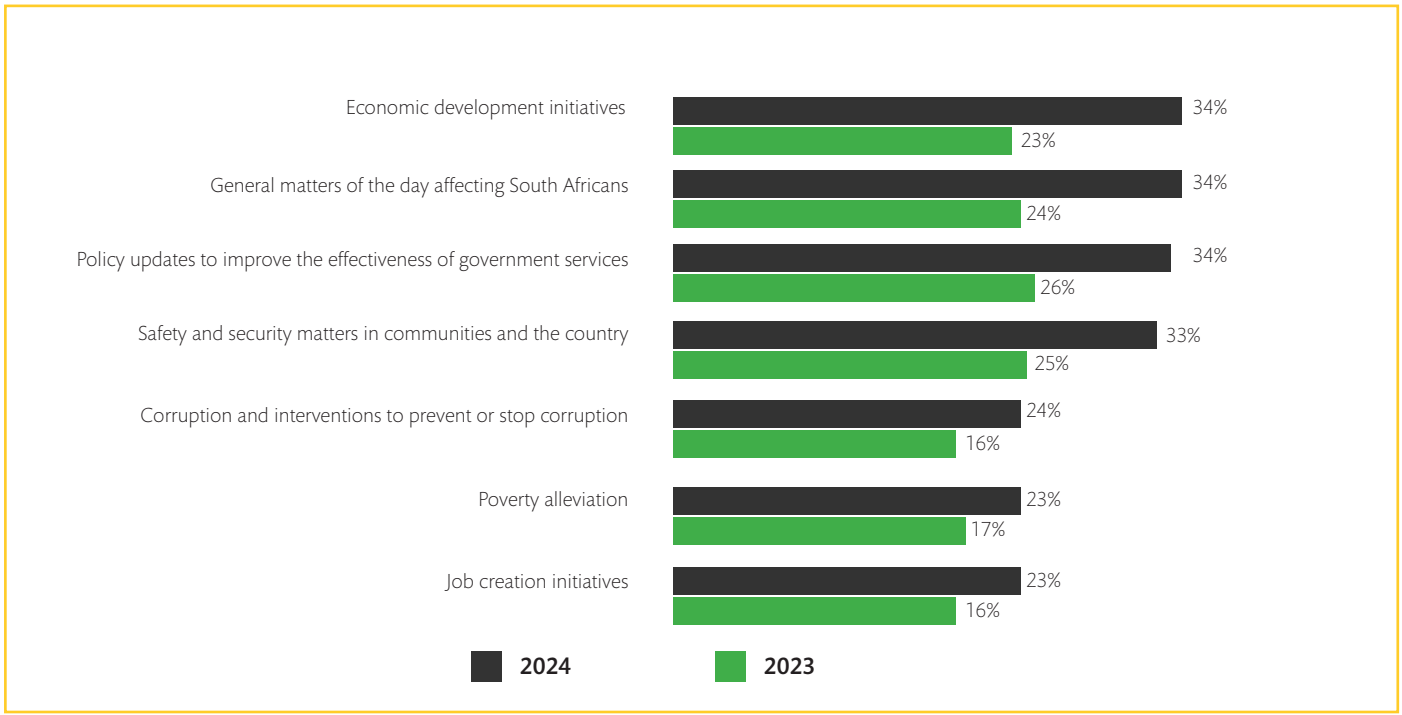


Source: Brand SA: State of the Nation Report 2024

There is definitely a renewed interest in the activities of government. The graph below illustrates the effectiveness of communication from government on a range of topical matters. The 2023 scores were considered very ineffective as the lower the score, the less effective the communication. It is noted that there is a trust aspect woven through these scores. The low score in 2023 may also be so low because whatever communication was heard or received may be considered not trustworthy. Anecdotal feedback from teams working in KwaZulu-Natal suggested that nothing the government at the time said could be trusted. It was perhaps also a strategy from the opposition party.

In this review, the survey asked people to rate the effectiveness of government communication on several matters. The scores improved substantially, although the pattern remains the same.

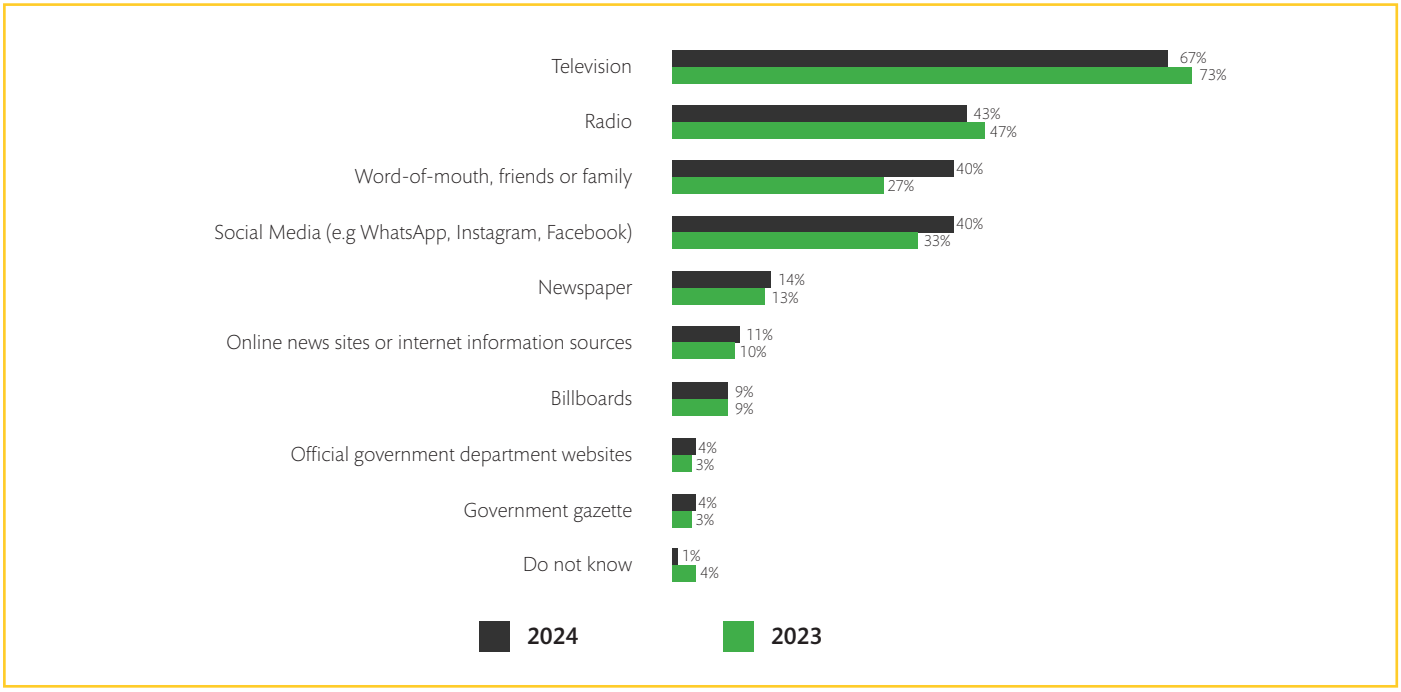
Figure 19: Expectations of the role of government under the GNU



Source: Brand SA: State of the Nation Report 2024

Television remains the most effective channel through which updates should be communicated. Although radio is in second place, it is a much more difficult platform to utilise due to the highly fragmented nature of the radio industry. Third and fourth options are very different to the 2023 scores and a pattern that will be noted later as well when Brand SA and Play Your Part brands are discussed.

Figure 19: Expectations of the role of government under the GNU

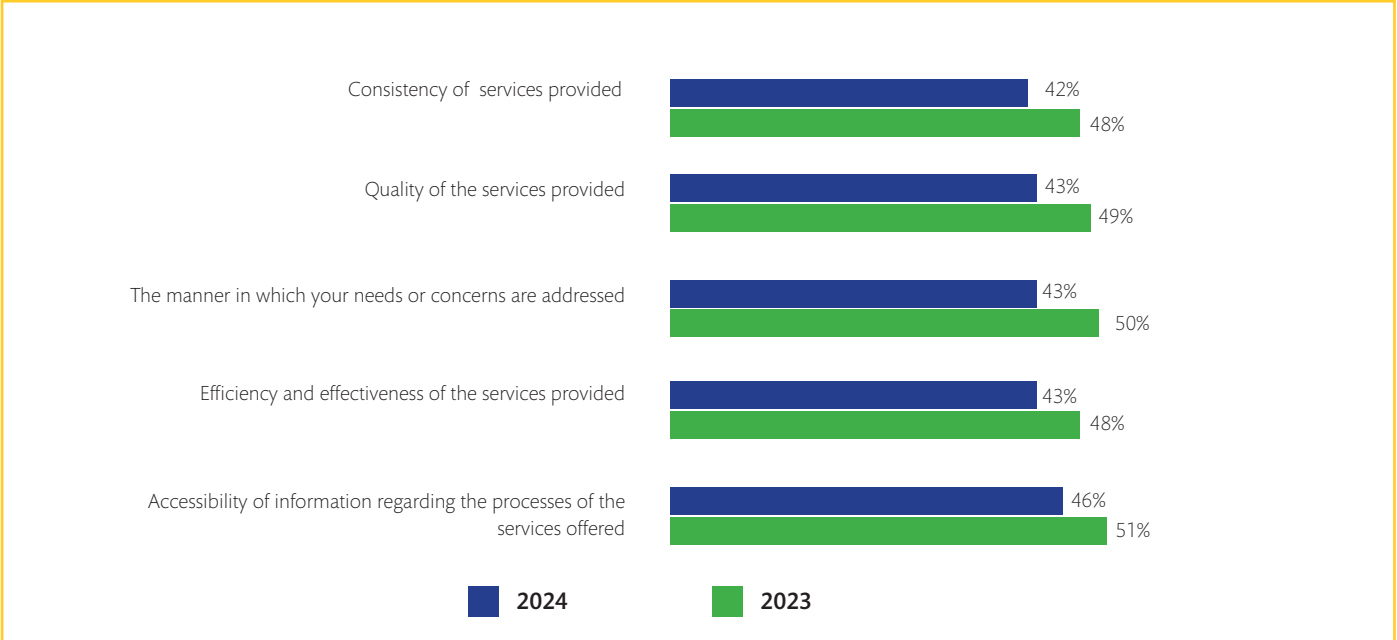


Source: Brand SA: State of the Nation Report 2024

In the last part of the performance of government (see figure 70 above), a very interesting shift is noted. In 2023, with many expectations at a very low point, the performance of government was rates below average. In 2024, despite the optimism with the GNU, government performance is rate even lower.

Although the hope of the nation is positive and strong, the nation has not noticed the change by the GNU. The lived experience remains the same. There is a lived experience sentiment that must develop and take shape before real change will be accepted.

Figure 22: Comparative rating of government service between 2023 and 2024



Source: Brand SA: State of the Nation Report 2024

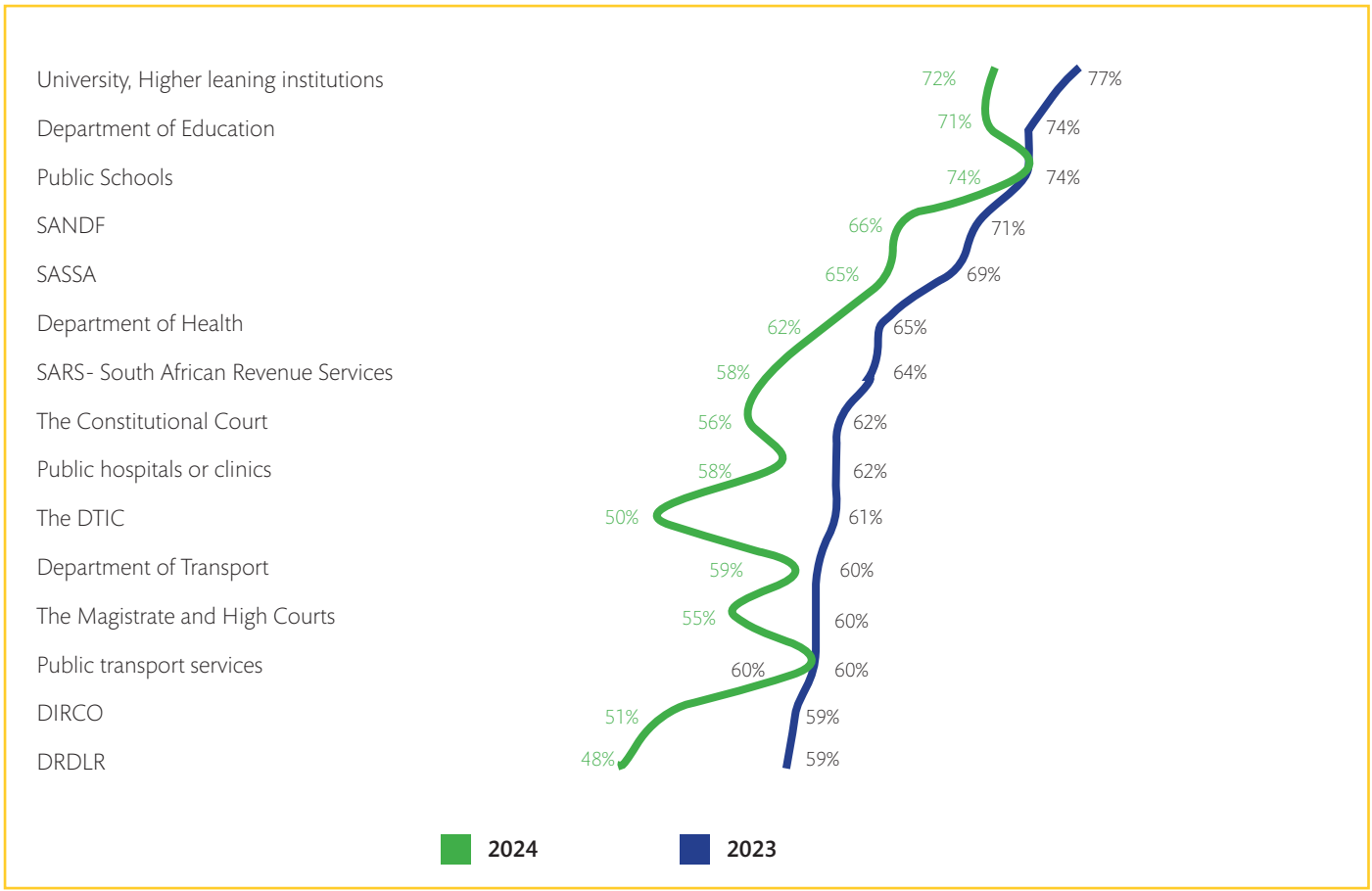
Moving on from government ratings and performance to personal circumstances and experiences, in the next chapter.

10. Circumstances and experiences

This section explores the daily circumstances and experiences of South Africans. How people perceive life in South Africa through the lens of public, government or private institutions and services. It further looks at life in the community and what life is potentially like in South Africa five years from now.

Overall, the 2024 ratings have increased since 2023. As seen throughout this report, the renewed and rekindled hope in the future of South Africa under the leadership of the GNU is revisited here. Public schools and public transport remain unchanged. The greatest improvement in trust was noted in DTIC and DRDLR (Department of Rural Development and Land Reform). Please remember this survey was conducted in November 2024, it was before the signing into law of the Land Expropriation Bill, or the Bela Act related to schools.

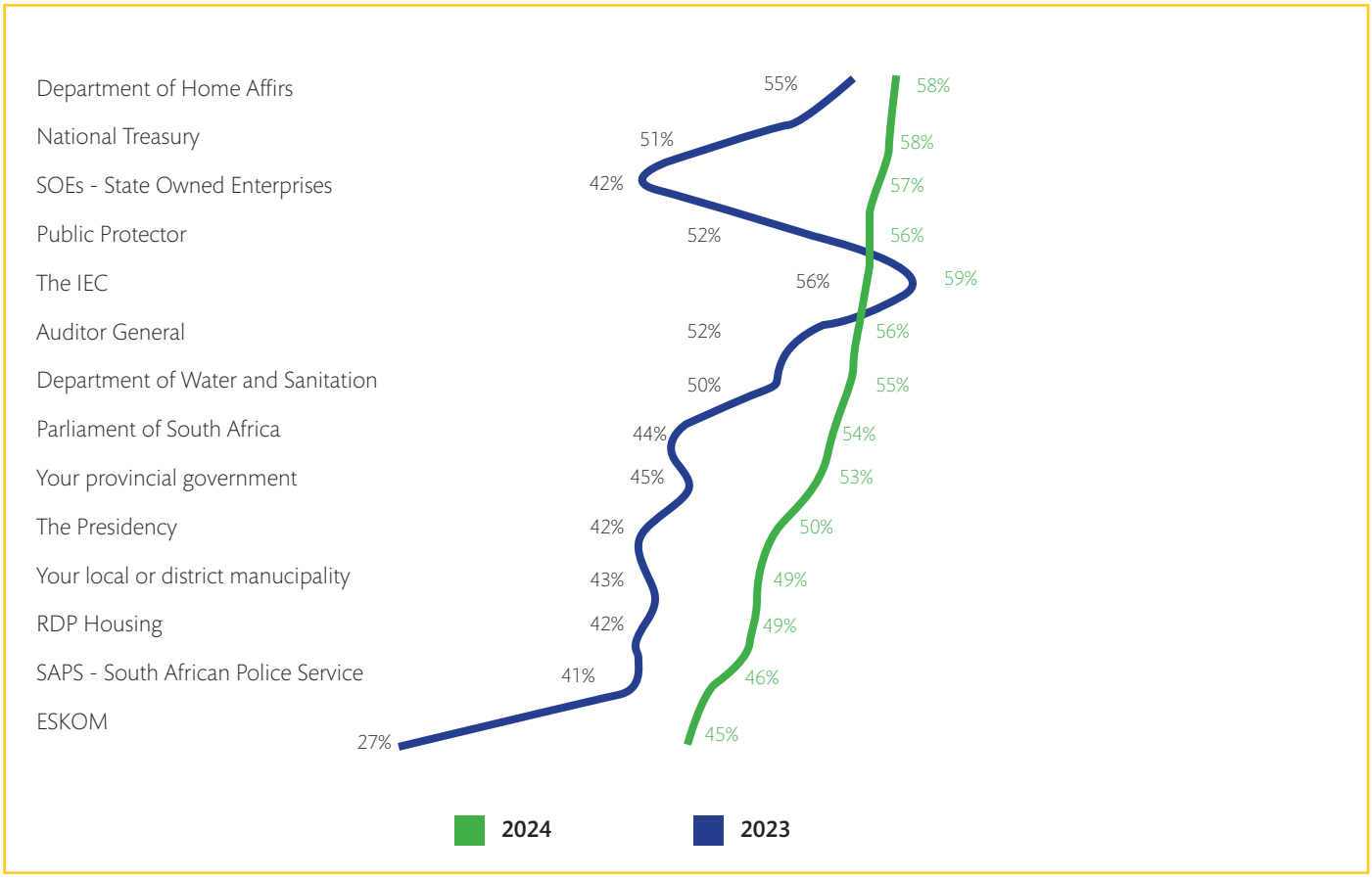
Figure 23: Level of trust in public and government organisations (higher scores mean higher levels of trust) 1



Source: Brand SA: State of the Nation Report 2024

In the second set, the IEC has now done the work, the level of trust decreased as it was no longer relevant. ESKOM, since load shedding is no longer part of day-to-day activities and planning, improved its rating substantially. The SAPS, in second last place is touched on again later when the level of confidence is tested whether the Police will come if they are called.

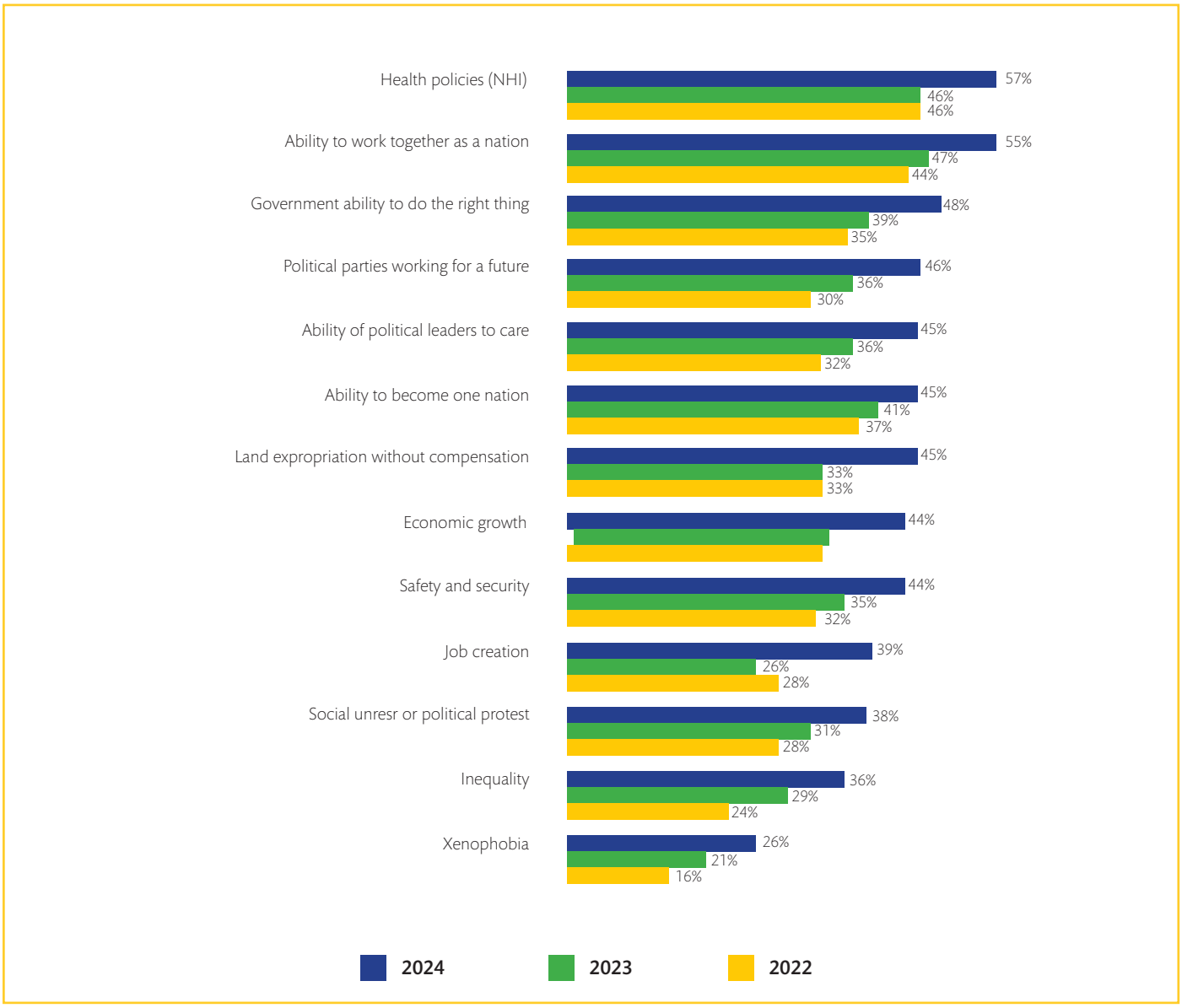
Figure 24: Level of trust in public and government organisations (higher scores mean higher levels of trust) 2



Source: Brand SA: State of the Nation Report 2024

Looking ahead, the nation is a lot more optimistic that circumstances and conditions will improve. Between 2022 and 2023, amidst the election hype, the scores were low and stable. Now, in 2024, the scores are much higher and optimistic. This does not take away the concerns as will be seen next.

Figure 25: Level of confidence in the future of South Africa



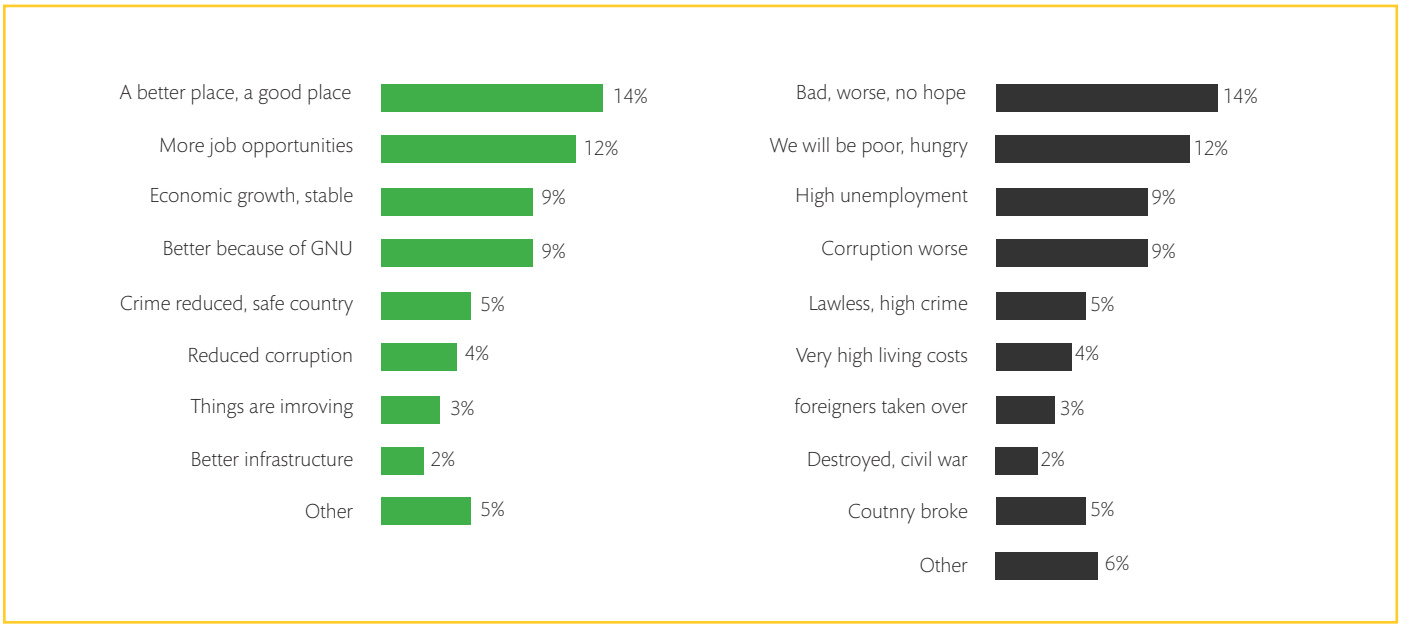
Source: Brand SA: State of the Nation Report 2024

As a final evaluation of the perceptions about where South Africa is, the majority of sentiments are positive. This aligns with the overall sentiments seen in this report. The top five negative sentiments align with the findings across the report: a sense of hopelessness, mainly associated with high unemployment, maladministration, poor service delivery, and crime. Very high living costs could be added to high unemployment, as these two correlate, pushing it to number two on the list.

Positive		Neutral		Neutral	
2023	2024	2023	2024	2023	2024
51%	68%	8%	18%	80%	54%

Source: Brand SA: State of the Nation Report 2024

Figure 26&27 : Current positive and negative aspects of South Africa

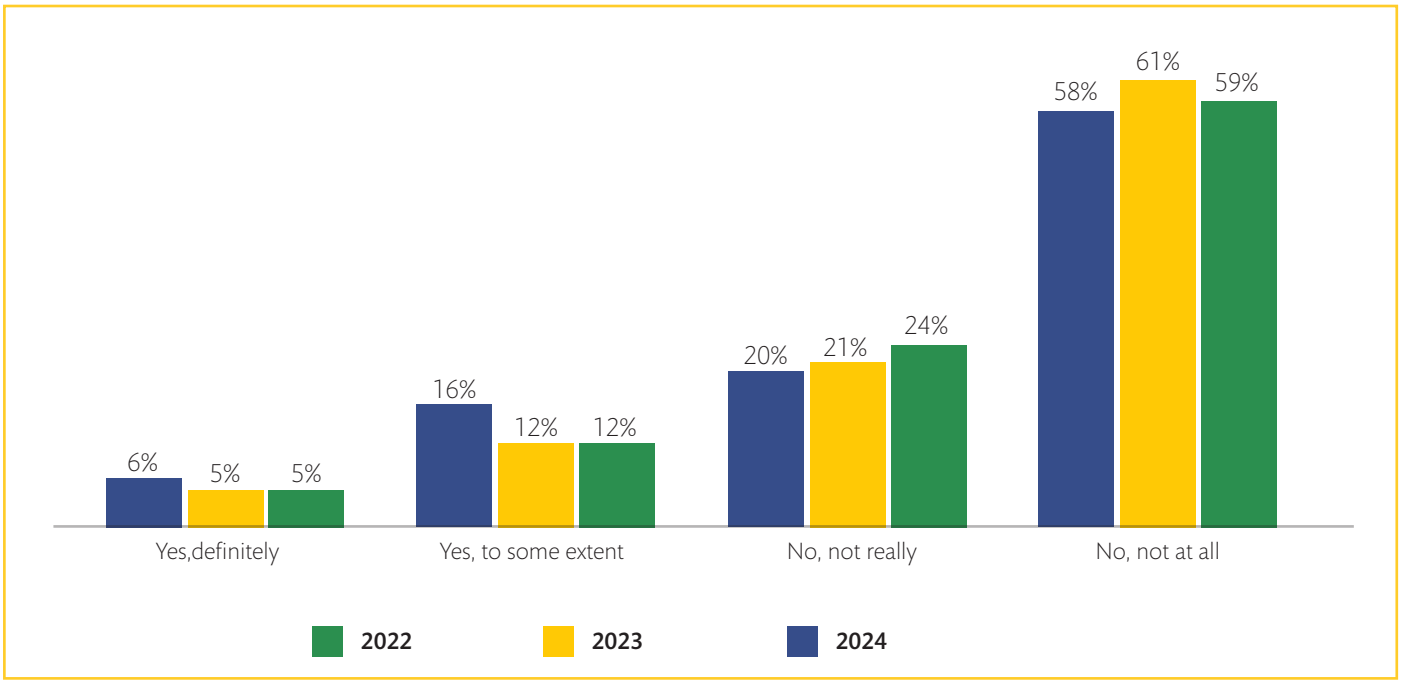


Source: Brand SA: State of the Nation Report 2024

Considering the broader contexts of life in South Africa, the assessment now looks at lived experiences. Daily life interactions between South Africans.

There is evidence that people are more tolerant toward one another. However, at the same time, there is greater development of inclusive and exclusive community groups. Despite these developments, few people experience any form of racism year on year.

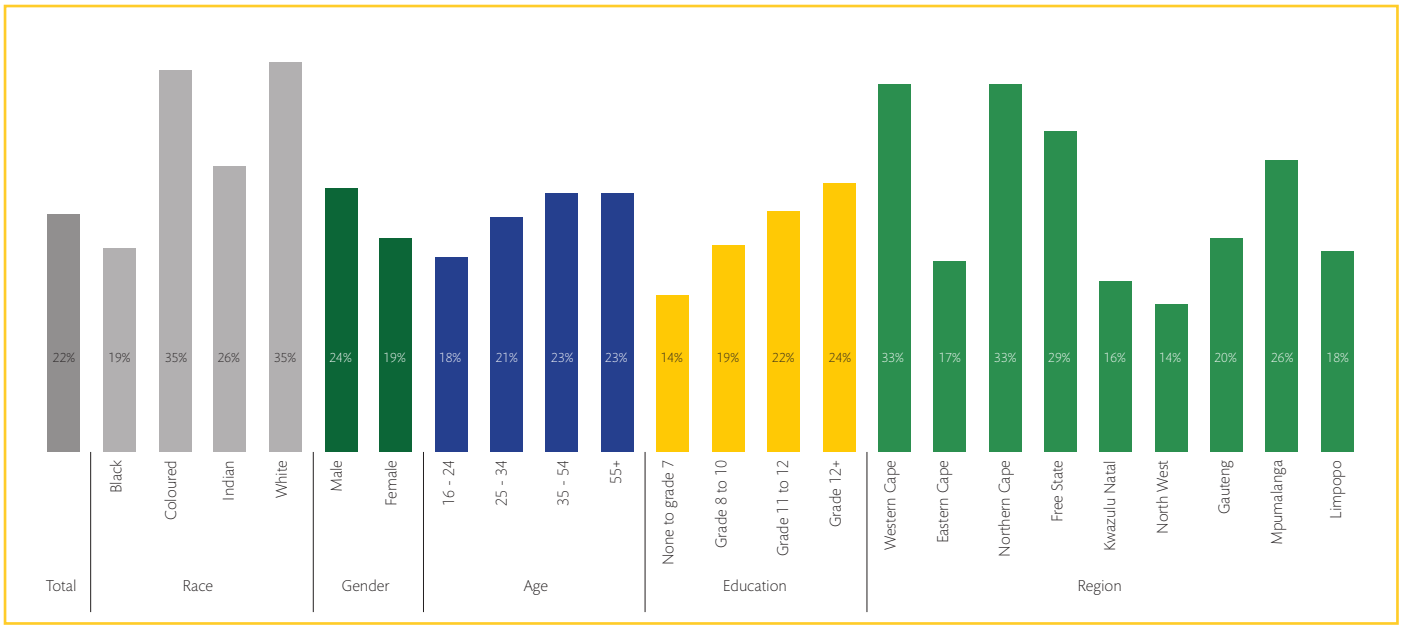
Figure 28: Have you experienced any form of racism in the past year



Source: Brand SA: State of the Nation Report 2024

Looking more specifically, who experienced racism (Yes, definitely, yes, to some extent)? In general, the White and Coloured communities recorded forms of racism, as well as those with higher levels of education. The balance of the indicators shows a similar level of awareness.

Figure 29: South Africans who experienced some form of racism during the past Year

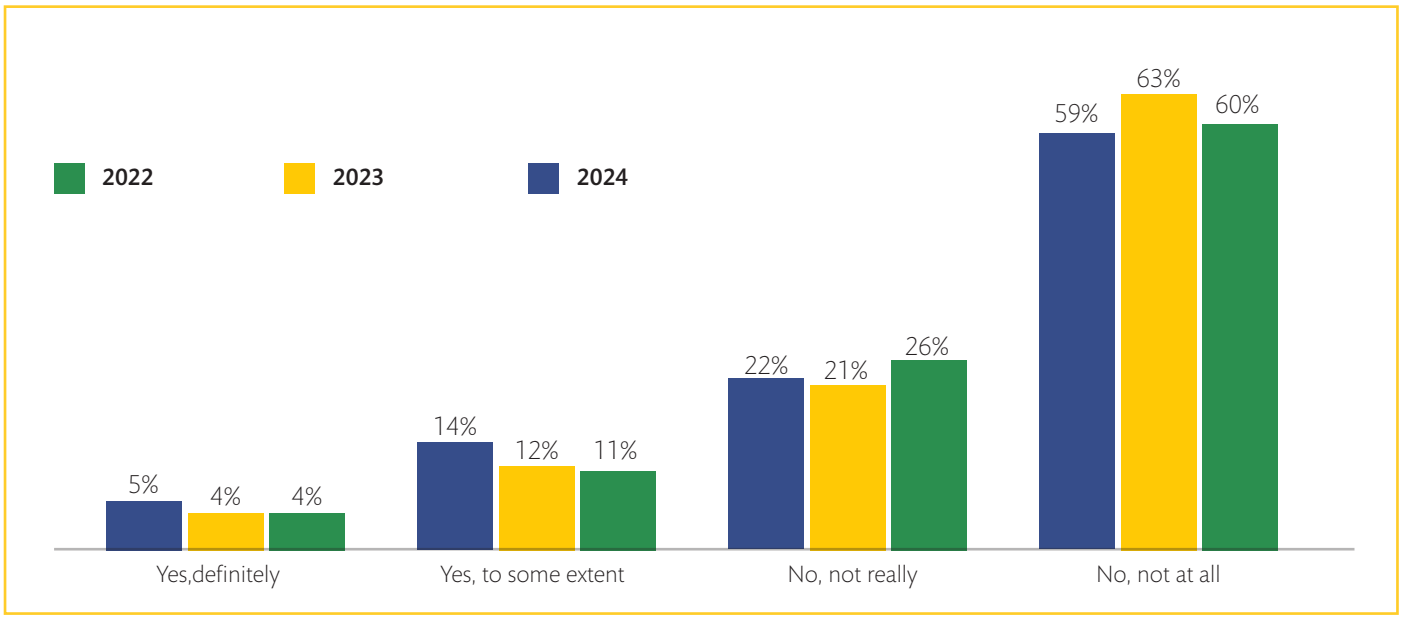


Source: Brand SA: State of the Nation Report 2024

Shifting from one form of discrimination to another. The Gender-Based Violence (GBV) narrative started in 2020 with a substantial focus on the lives of women and children amidst lockdown circumstances.

Be that as it may, the nation is either unaware of what constitutes gender discrimination or has simply learned to live with it, particularly considering the year on year "No, not at all" figures seen below. Male respondents were slightly more aware of gender discrimination than female respondents, again, highlighting the awareness and willingness to talk about it.

Figure 30: experienced any form of gender discrimination in the past year

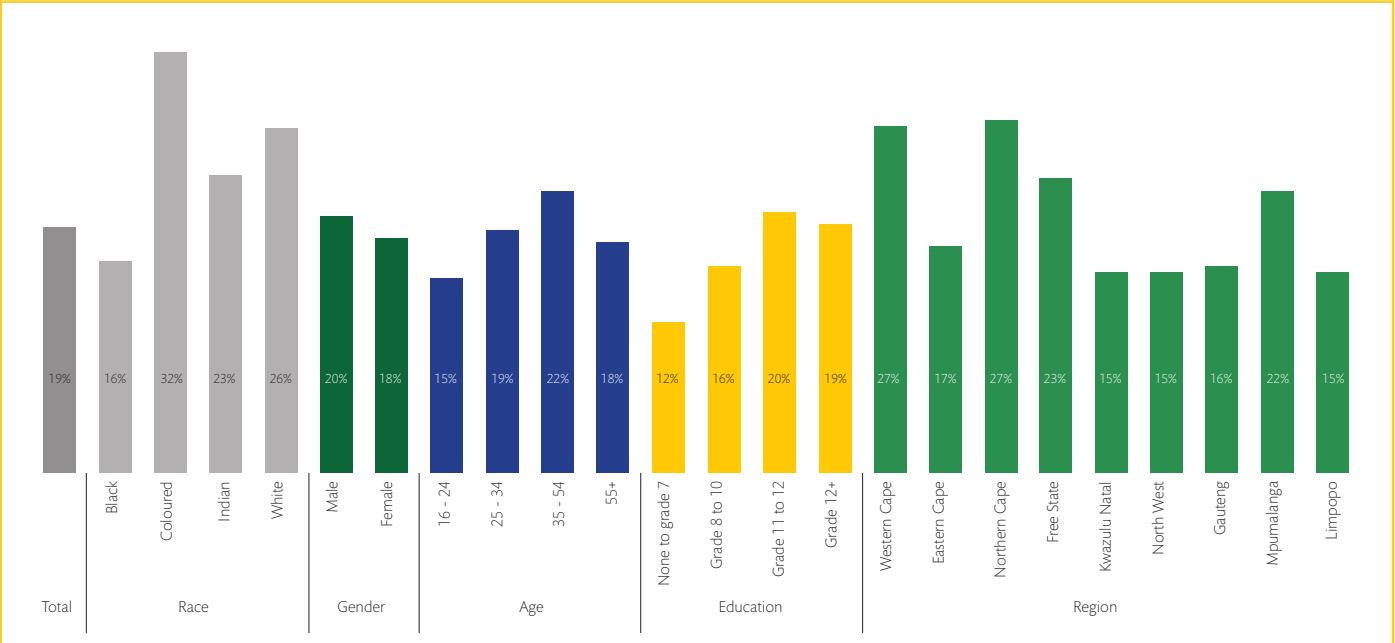


Source: Brand SA: State of the Nation Report 2024

A similar profile to racism is seen. Gender discrimination incidence decreased from almost 25% to 16% last year and is slightly up to 19% this year. In line with the previous slide, the evidence suggests that the awareness and impact of GBV and gender discrimination are underreported due to limited access to information, uninformed of what may or may not constitute gender discrimination.

This aligns well with the level of education, as it is unlikely that those who are more educated would experience substantially higher levels of gender discrimination, as the data below suggests.

Figure 31: South Africans who experienced some form of gender discrimination

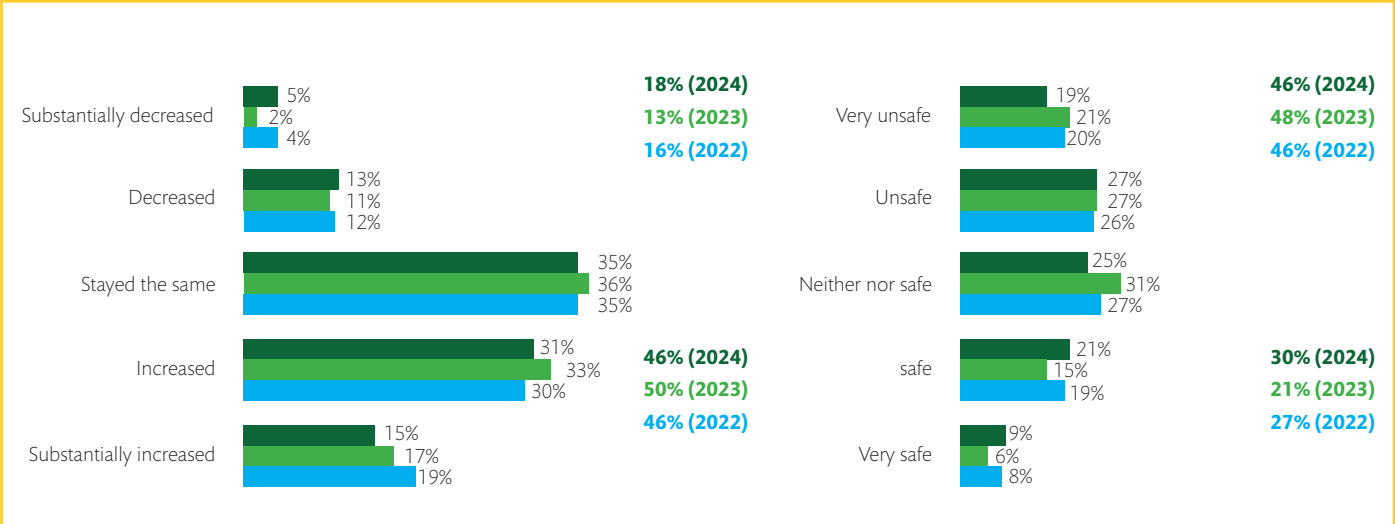


Source: Brand SA: State of the Nation Report 2024

Moving on, in the last part of this chapter, from the personal to community life with particular focus on three indicators, perceptions about crime, perceived level of feeling safe, and confidence that the police will come when called. All three indicators improved in performance compared to 2022 and 2023. This may not be due to actual lived experiences, as none of the other indicators in this report confirmed the impact on life

after the establishment of the GNU. Furthermore, at the time of this survey, in November 2024, the GNU was in place for four months, or 120 days at best. However, it is suggested that the 2023 indicators, which emphasised the level of uncertainty as seen in reluctance to engage, heightened the sense of feeling unsafe, and that levels of crime are high. Only 18% of the nation reported a decrease or substantial decrease in levels of crime, and only 30% feel safe or very safe.

Figure 32: Perceived change in the levels of crime and feeling safe in South Africa

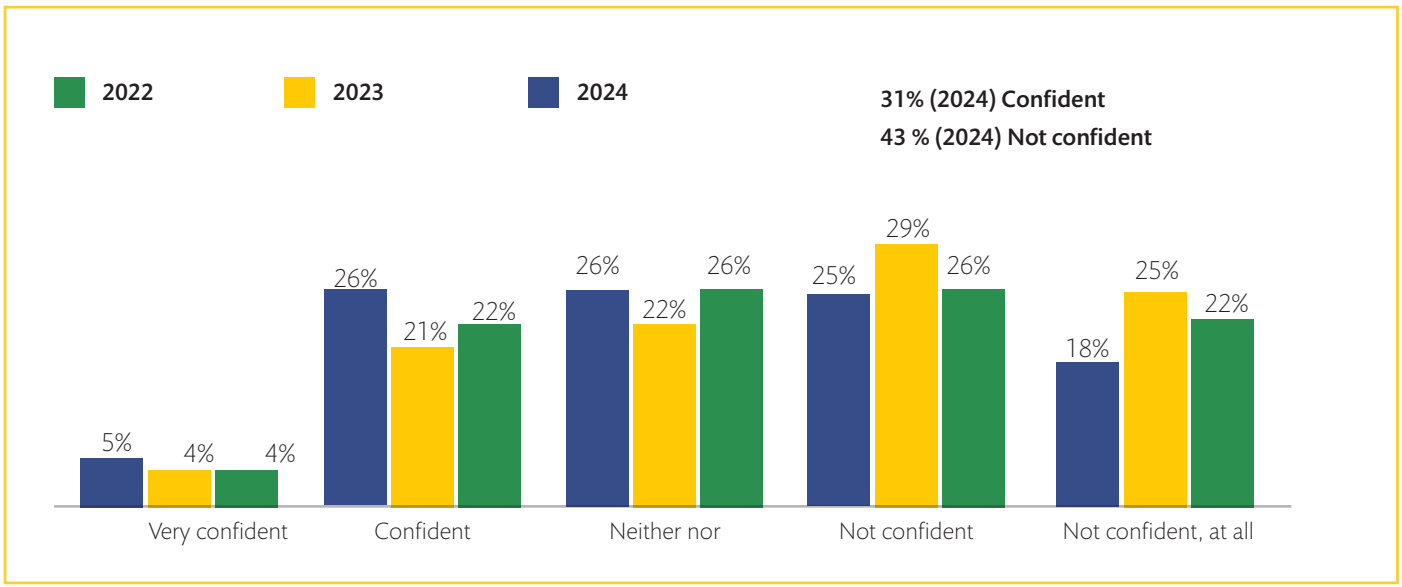


Source: Brand SA: State of the Nation Report 2024

There is a far greater concern about the level of crime and safety in communities than is officially reported. These are still high %ages. It means that almost half (46%) the country live in communities where they feel unsafe.

As the last indicator, respondents were asked if they had to call the police right now for an emergency, how confident are they that the police will come. Only 31% felt confident that the police would come, against 43% who did not feel confident. This aligns with the low level of trust expressed in the SAPS seen earlier, one of the lowest-ranked organisations in the country, next to ESKOM.

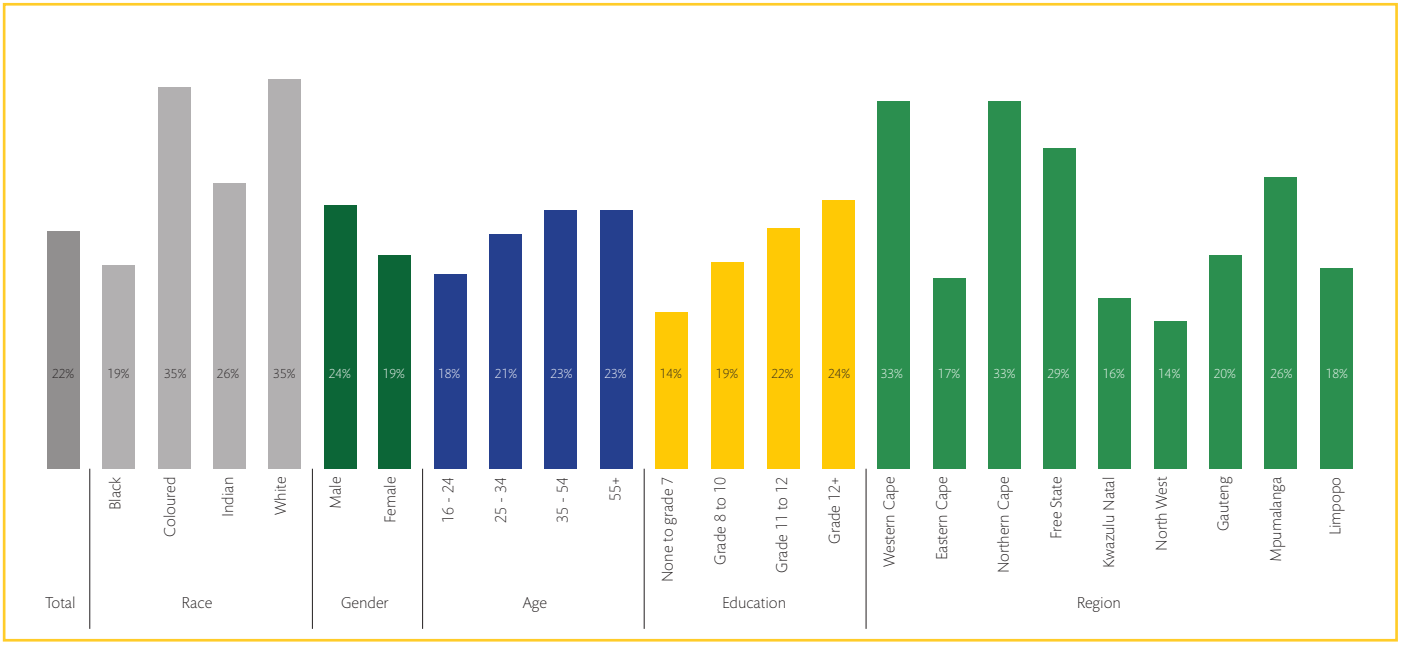
Figure 30: experienced any form of gender discrimination in the past year



Source: Brand SA: State of the Nation Report 2024

There are only slight differences between the demographic groups. The White race group feels most confident that the police will come to their aid if need be. The balance of the demographic indicators shows marginal differences.

Figure 29: South Africans who experienced some form of racism during the past Year



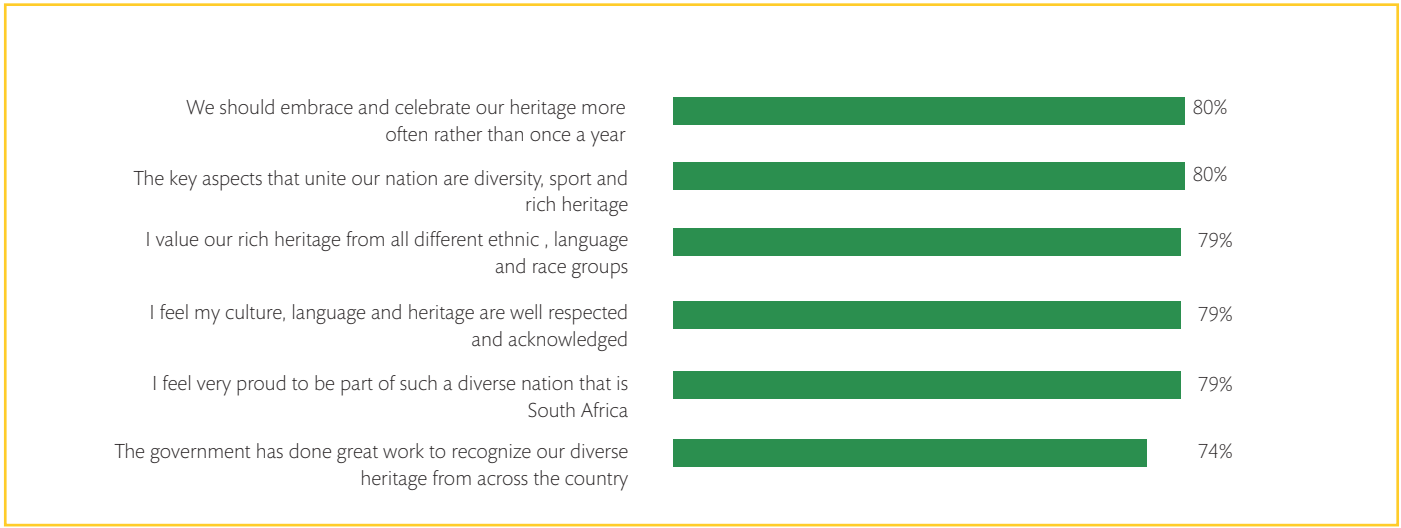
Source: Brand SA: State of the Nation Report 2024

This concludes the section on lived experiences in South Africa. In the next section, Brand South Africa awareness, media, and engagement analysis are illustrated.

11. Celebrating our heritage

South Africa's rich and diverse cultural heritage remains a cornerstone of national identity and pride. The data affirms that citizens across the country strongly value the cultural, linguistic, and ethnic diversity that defines the nation. The top five statements on this theme all scored between 79% and 80%, highlighting a broad societal consensus that our heritage unites us, and it should be celebrated more frequently and meaningfully.

Figure 35: Drivers of heritage and appreciation of South Africa's diversity



Source: Brand SA: State of the Nation Report 2024

Encouragingly, 74% of respondents believe that the government has done great work in recognising the country's diverse heritage. While this score is marginally lower than the others, it remains remarkably strong. It signals widespread public appreciation for state-led efforts to honour and promote diversity and points to an opportunity for the government to build on this goodwill with more visible and sustained heritage-focused initiatives.

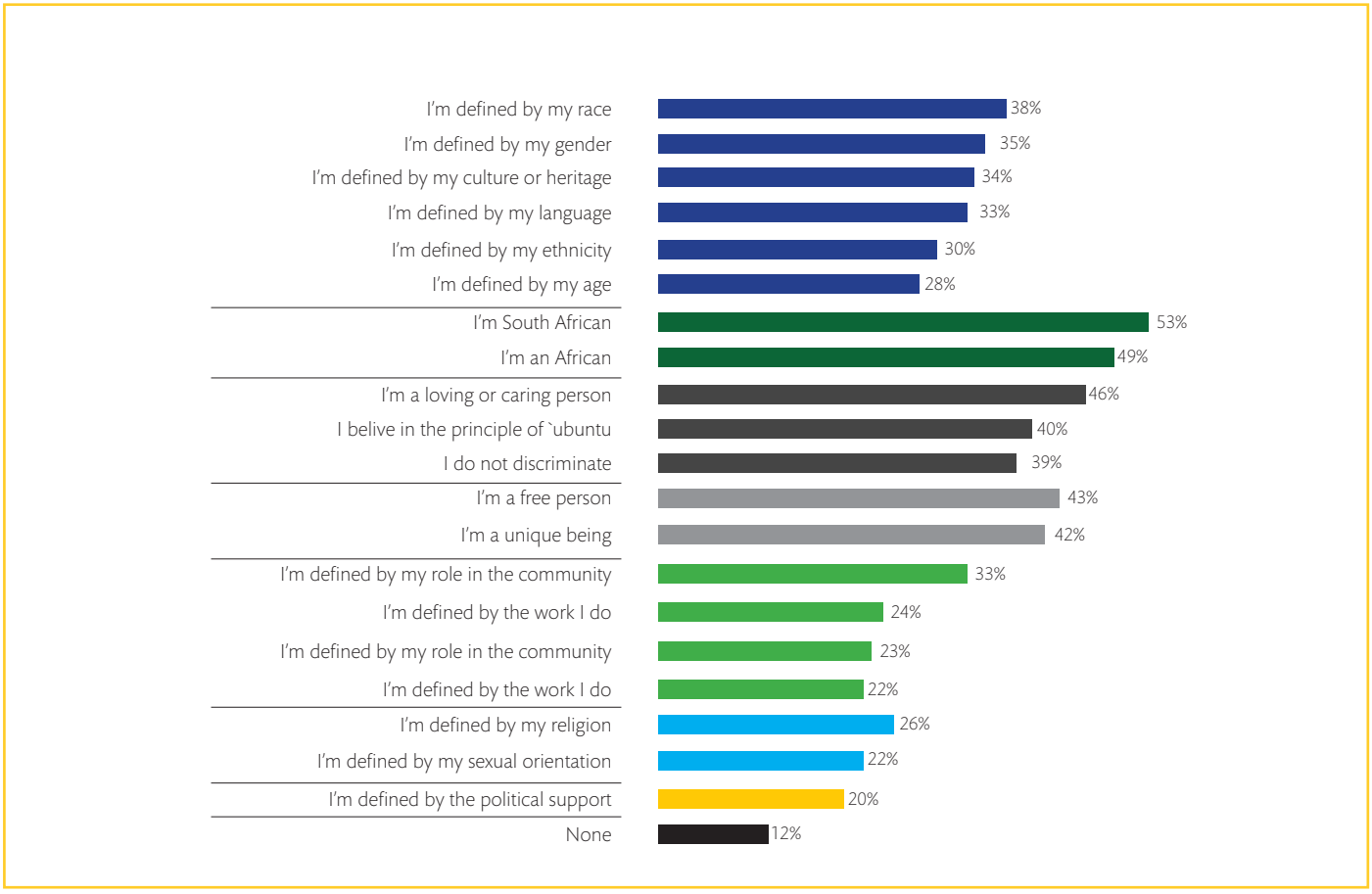
Importantly, this data reflects a shift in the national identity narrative. While earlier nation-building concepts such as the "miracle nation" and "rainbow nation" laid a critical foundation, the current identity is being shaped organically through lived experience, inclusive pride, and a deepening appreciation for the richness of South Africa's people. This evolution offers a renewed platform for unity, driven not only by history but by the everyday expressions of Ubuntu, mutual respect, and collective belonging.

12. Identity Clusters

The identity cluster is an important precursor to the three main constructs: National Pride, Active Citizenship and Social Cohesion. The data reveals a growing emotional and values-based identity rooted in solidarity, shared humanity, and collective belonging. Concepts like Ubuntu, unity in diversity, and national pride are not merely ideals however they are becoming the pillars of an increasingly inclusive South African identity. At the core of the findings lies a compelling insight as highlighted in figure 14 below: 53% of respondents define themselves primarily as "South African." Surpassing other key markers such as race (38%), gender (35%), culture (34%), and language (33%). This indicates a deepening sense of national belonging that transcends demographic divisions a shift toward a more inclusive and cohesive national identity. It suggests that South Africans see themselves as firmly grounded in their national context yet intrinsically connected to a broader African identity.

Equally significant is the rise of values-based self-identifiers, with 40% affirming belief in Ubuntu and 46% describing themselves as caring individuals. These choices reflect more than self-perception they reveal the kind of country people aspire to build one anchored in dignity, mutual respect, and a collective moral compass. In a time of global fragmentation, South Africans are offering something profound: a multidimensional identity that is emotionally grounded, forward-looking, and deeply self-defined.

Figure 36: The identity profile composition and ranking



Source: Brand SA: State of the Nation Report 2024

Despite persistent socio-economic challenges, including crime, unemployment, and service delivery constraints that continue to influence perceptions of identity, there is renewed hope following the 2024 elections and the establishment of the Government of National Unity. For the Nation Brand, this evolving emotional architecture is a strategic asset. Identity is no longer fractured; it is multi-dimensional, self-determined, and increasingly aligned with a vision of renewal through inclusivity and shared purpose.

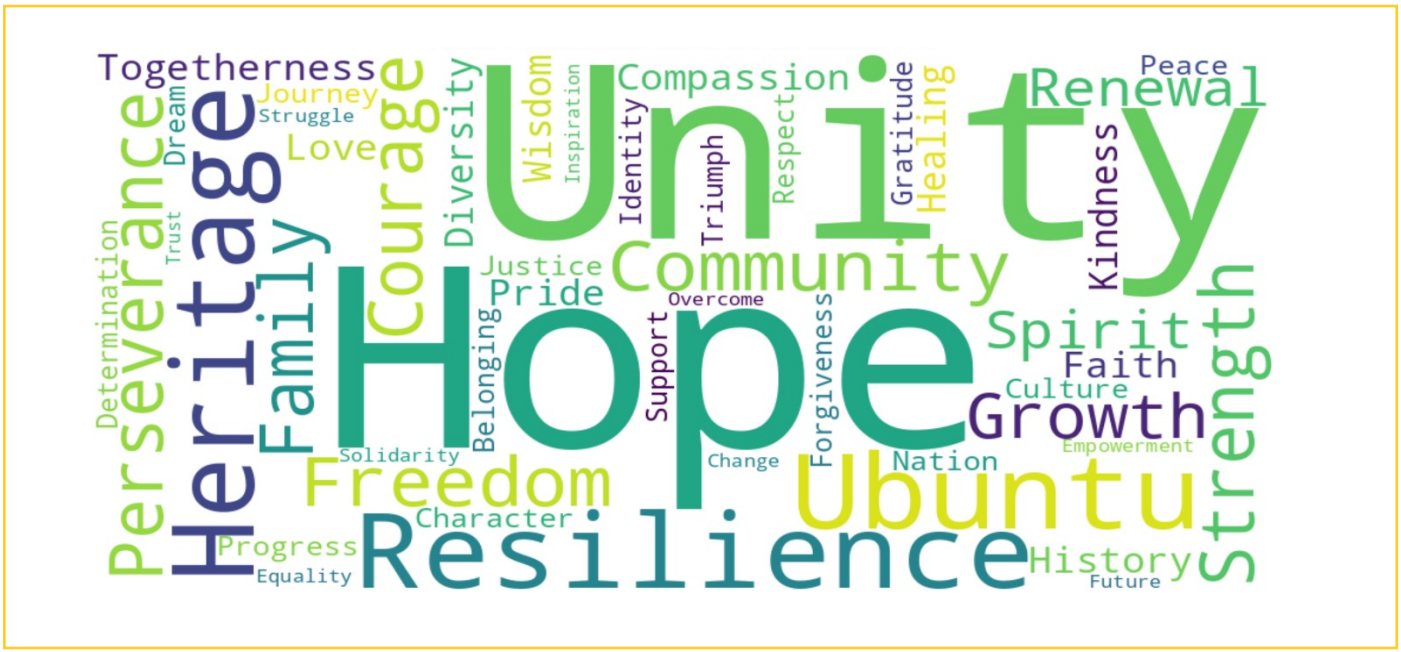
A more detailed breakdown of the identity clusters including variations across provinces, age groups, and demographic profiles is provided in Annexure 1 for further reference.

12.1 The Heart of a Nation: What South Africans Are Thankful

Beyond the identity clusters, the findings highlight what lives at the heart of South African society: the values, traits, and shared experiences that define its emotional character. South Africans consistently demonstrate remarkable tolerance and forgiveness even in the face of delivery constraints, governance challenges, and social strain, people remain largely peaceful and willing to look forward.

The country's natural beauty continues to inspire pride, with two oceans, sweeping coastlines, and a rich diversity of landscapes offering both literal and symbolic grounding. Cultural richness across languages, customs, and traditions is celebrated not as a difference, but as a shared identity. A sharp, often ironic sense of humour provides not just comic relief, but social cohesion in times of crisis. Unity forged through historical struggle, from the anti-apartheid movement to the solidarity seen during COVID-19, reflects a resilience that remains foundational. While moments of sporting triumph may be fleeting, they continue to serve as powerful reminders of what is possible when the nation moves with one spirit. This sentiment is further reflected in the word cloud, see below, generated from responses to what South Africans are most thankful for.

Figure 37: What South Africans are Thankful For



Source: Brand SA: State of the Nation Report 2024

At a glance, it captures the emotional truths behind the data and tells a story of a resilient and emotionally connected nation. Unity, hope, Ubuntu, heritage, and perseverance rise to the surface as the nation's moral compass, which are values not simply remembered but actively lived. These are not merely reflections of the past; they represent the emotional levers driving national renewal and social cohesion today. Whether expressed through everyday acts of kindness, the endurance of family bonds, or belief in a better future, these values form the beating heart of the Nation Brand. They are more than values, they are the emotional DNA of the country and a vital asset in the evolving story of the nation.

13. Social Cohesion, National Pride & Active Citizenship

Source: Brand SA: State of the Nation Report 2024

The three constructs, National Pride (NP), Active Citizenship (AC) and Social Cohesion (SC) are based on a battery of statements. The statements were developed in 2017 after international and local literature reviews, tested in a national pilot survey and statistically refined to a final set. The initial battery of statements for the three constructs were NP n=37, AC n=29, SC n=29. A total of 95 statements forms the basis for the development of the behavioural groups or expressions. In 2023, the statements were tested again in a pilot survey and additional statements were added. The main base remained the same for comparative purposes with previous years. The statement sets for 2024 to 2027 are NP n=37, AC n=37, SC n=36, yielding a 110-statement battery for the development of the behavioural groups.

For each construct, the statements are analysed following a bespoke statistical process. Although the statistical process is set, every year is evaluated separately to ensure the changes seen is not methodological, but actual changes in the behaviour of the nation. It is in following this approach that the number of factors per year change, the score changes and the sentiments change.

The robustness of the construct score, the statistical process behind it and the historic analysis all indicates the complexity and robustness of these indicators. The scores are incredibly sensitive. This is why the overall construct scores are shown at the first decimal. The important point is therefore not the score itself but the direction in which it is moving.

Please note in the development of the overall sentiment of the country, National Pride is the entry level construct, it requires little input or action from a person to feel a sense of pride. The second, more complex construct is Active Citizenship. This requires the person to reach out with an altruistic approach to others. The basic form of active citizenship is to vote which is a passive participation in the overall management of one's environment. The third and most demanding construct is social cohesion. Social cohesion requires one to connect with fellow South Africans and can be as horizontal (more demanding) or vertical (connecting with the state or coordination structures). The distinction in complexity is important to note.

14. Social Cohesion

Social cohesion is a multidimensional construct that reflects the degree of connectedness, trust, and solidarity among individuals and between citizens and institutions. It underpins societal stability, inclusive development, and democratic resilience. As the most complex construct, it takes a long time to change. Over the past three years, South Africa's Social Cohesion Index scores have reflected both resilience and renewal in the national mood. In 2022, the score stood at 63.1, followed by a slight decline to 62.8 in 2023, a period marked by pre-election uncertainty and socio-economic pressures. However, in 2024 the score rose to 65.7, the highest in this three-year cycle.

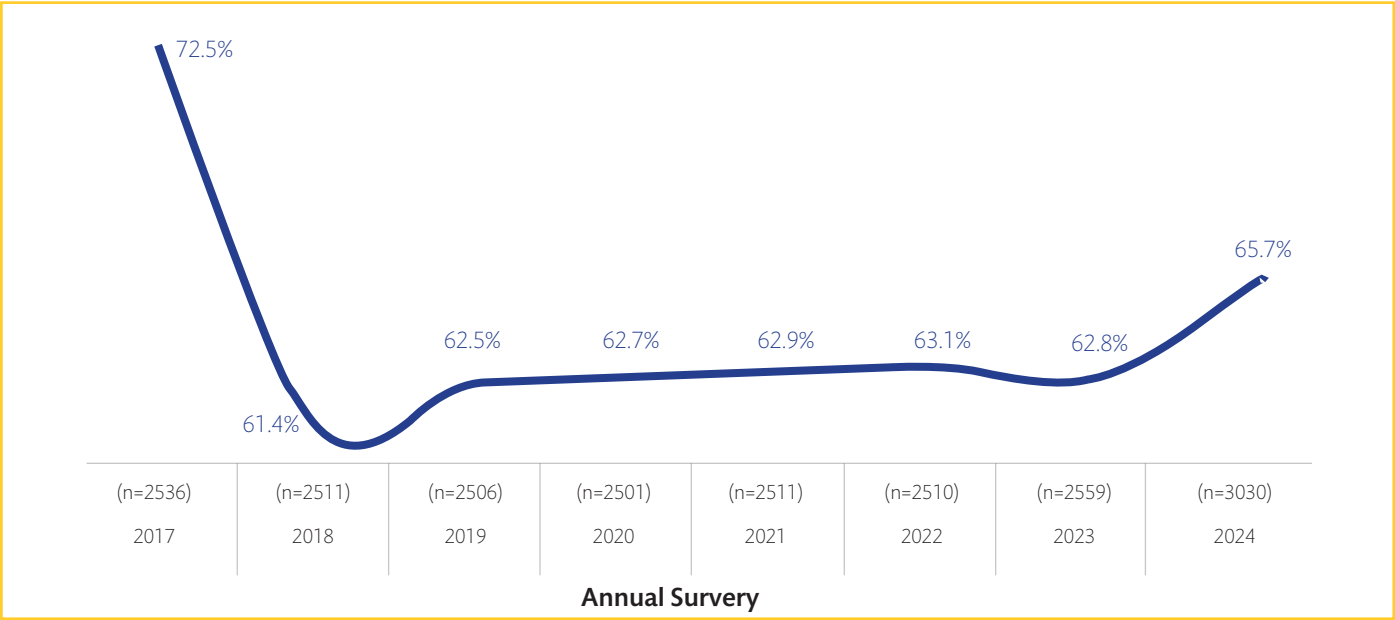
Table 4: Comparative National Social Cohesion Index scores

2022	2023	2024
63.1%	62.8%	65.7%

Source: Brand SA: State of the Nation Report 2024

A deeper analysis of the trajectory of South Africa's Social Cohesion Index over the past seven years (Figure 16 below) tells a compelling story of a nation redefining its identity not only through its challenges but through its capacity for renewal. In 2017, the index reflected strong public optimism, signalling high levels of national confidence and unity. However, the years that followed revealed critical institutional gaps and rising socio-economic pressures, leading to a marked decline in 2018. This period became a national inflection point highlighting the need to rebuild trust and recalibrate the social contract. From 2019 to 2022, cohesion began to stabilise, underpinned by the resilience of communities and a growing re-engagement with democratic values. Even amidst external shocks such as the COVID-19 pandemic, the nation's social fabric held firm. A modest decline in 2023 pointed to pre-election uncertainty and lingering inequality, yet the underlying narrative remained clear: South Africans continue to demonstrate a strong sense of shared identity and a desire to move forward together.

Figure 38: National Social Cohesion Index 2017 – 2024



Source: Brand SA: State of the Nation Report 2024

In the 2024 review, five distinct social cohesion clusters (see Table 9 below) were identified, each reflecting different yet logically grounded perspectives on how South Africans experience unity, fairness, and belonging within the current national context. These clusters illustrate the evolving nature of social cohesion in a country shaped by both optimism and reform to deal with structural inequality, unemployment, and poverty.

Clusters one and three represent the foundational elements of social cohesion, i.e., vertical cohesion indicating trust in institutions and horizontal social cohesion indicating solidarity among citizens. Cluster one is characterized by a broad and steady reliance on formal systems and processes, including government and other institutions, to maintain order and provide support. This group places confidence in structured mechanisms to enable societal functioning. In contrast, cluster three reflects a people-centred view of cohesion, with individuals drawing strength and connection primarily from fellow South Africans, placing little reliance on formal institutions. For this group, social cohesion is rooted in community networks and interpersonal trust.

Table 9: The Social Cohesion clusters identified in 2024

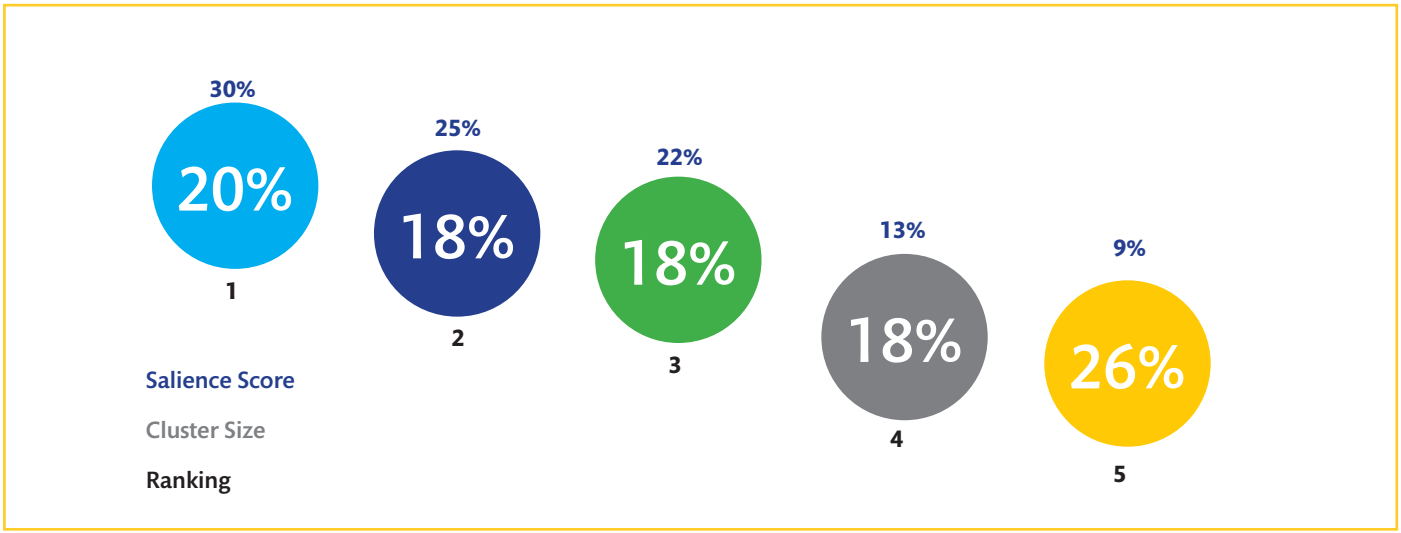
Number	Social Cohesion Clusters
1	A broad and strong reliance on systems and processes, both government and other, to maintain order and provide support. (20%)
2	Believes in equal access with mechanisms like worker's unions keeping things in check. Everyone has an equal opportunity. (18%)
3	Connecting with fellow South Africans (horizontal) with little or no reliance on government or other systems. It is about people. (18%)
4	Inequality, high unemployment and homelessness are concerns. Things like minimum wage are important measures. (18%)
5	This cluster feels overlooked and unfairly burdened (taxed) for having a job and living in areas where services are delivered. (26%)

Source: Brand SA: State of the Nation Report 2024

Clusters two and four present more nuanced compositions. Cluster two is grounded in the belief in equal opportunity, supported by mechanisms such as worker unions to uphold accountability and fairness. It reflects a democratic outlook where systems are expected to function equitably, giving everyone a fair chance to thrive. Cluster four, meanwhile, is marked by heightened awareness of inequality, unemployment, and homelessness. Members of this cluster view protective measures such as the minimum wage as essential tools to safeguard social stability and inclusive growth.

Of particular interest is the emergence of cluster five, a sentiment configuration not previously observed in this form. While this group feels they carry a disproportionate share of responsibility, especially in terms of tax contribution and service delivery expectations, the sentiment is not one of disengagement. Rather, it reflects a perception of being overlooked or unfairly burdened, particularly among those who are economically active and reside in areas where services are effectively delivered. Their experience points to a growing civic expectation that visible contribution should be met with reciprocal recognition and fairness.

Figure 39: Social Cohesion cluster attributes depicting the size and importance of the clusters



Source: Brand SA: State of the Nation Report 2024

Exploring each of the five clusters in more detail reveals that while every cluster represents a unique perspective on social cohesion, they differ in both size and influence. Cluster size refers to the number of people who fall into each group indicating how widespread a particular view or experience is across the population. Salience, however, speaks to the strength or intensity of that view and its potential to shape broader public sentiment, regardless of how many people hold it. Cluster 1, as mentioned above is a vertical social cohesion construct that has a broad and strong reliance on systems and processes, both government and other, to maintain order and provide support. In other words, this cluster depends on government to make them feel safe and secure. They belief that with the various systems and structures in place, life is more predictable. Within the context of the GNU, it is logical that this cluster ranks first. It also highlights the dependency on government social support programmes without which many would feel a lot less safe. As the dominant anchor of social cohesion this year, it is re-emphasised should anything destabilise the GNU, this sense of hope may be adversely affected.

The second cluster focus on equality and equal access which believes in equal access with mechanisms like worker's unions keeping things in check. Everyone has an equal opportunity. The cluster is important as it considers equality for all focusing on mutual protection, support and access for everyone This cluster underscores the idea that inclusive systems are essential to advancing social cohesion particularly in a society where access to opportunity remains uneven. Its relevance is especially pronounced in the South African context, where structural inequality continues to shape the lived experiences of many. As one of the most unequal societies globally, the pathway to deeper social cohesion depends on addressing these disparities in a sustainable and inclusive manner. At the same time, this cluster reflects a broader public understanding that social cohesion is closely tied to perceptions of safety, stability, and certainty. Efforts to promote equity must therefore consider the structural economic challenges faced by communities, ensuring that interventions enable rather than limit economic participation. Social cohesion is more likely to thrive when fairness is pursued alongside policies that expand opportunity and reinforce individual and collective agency.

The third cluster represents what may be considered the essence of social cohesion or the foundation of social capital. It is characterised by strong interpersonal connections among South Africans, grounded in horizontal relationships with minimal or no reliance on formal systems or government structures. At its core, this cluster reflects a people-centred form of cohesion, built on mutual understanding, empathy, and a shared sense of belonging. Unlike other clusters, this group's independence from institutional support is not a sign of disengagement, but rather an expression of self-reliance and interpersonal trust. It represents the most advanced form of social cohesion precisely because it is the most difficult to cultivate, as it demands authentic human connection, emotional intelligence, and sensitivity to the thoughts and feelings of others. By contrast, cluster one, which centres on reliance on structured systems, may be seen as a simpler expression of cohesion, as it does not require direct personal engagement. Cluster three, however,

relies on the strength of social relationships and community bonds to hold people together. For this form of cohesion to deepen and endure, certain preconditions must be present, namely, a sense of physical safety, emotional security, and stable social conditions. These elements create the environment in which trust can flourish, and cohesion can move from system-led to people-led.

The fourth cluster shares a similar undertone with cluster two but emerges from a distinctly different orientation. Whereas Cluster Two is rooted in principles of equality and access, Cluster Four is driven by empathy and concern, a recognition of the hardships many South Africans continue to face. It reflects a heightened awareness of structural challenges such as inequality, high unemployment, and homelessness, and places value on measures like the minimum wage and social support mechanisms. The individuals within this group demonstrate an altruistic disposition, characterised by attentiveness to the needs of others and sensitivity to the ongoing economic pressures affecting vulnerable communities. While there is clear appreciation for state interventions aimed at alleviating poverty and hardships. The cluster's outlook suggests a call for deeper, more systemic change to address the root causes of inequality and to foster a more inclusive and stable society.

The final cluster represents a new development in the evolving social cohesion narrative. While recognising the structural inequality that persists in society, this group perceives itself as being disproportionately burdened by the very systems designed to address these challenges. Comprised largely of economically active individuals residing in areas where services are delivered, members of this group express a sense of imbalance where their formal employment and tax contributions are met with limited reciprocal benefit.

Their concern is not with taxation per se, but with the perception that they are carrying a dual load contributing to public services while increasingly relying on private alternatives for essentials such as security, education, healthcare, electricity, and transport. The need to fill these gaps through personal expense, often exacerbated by higher insurance and infrastructure costs, reinforces their view that they are subsidizing both the state and themselves. Yet, this group continues to participate, contribute, comply, and remain engaged. Their outlook reflects a desire for fairness and recognition rather than withdrawal. In this way, the cluster plays a meaningful role in social cohesion as it signals that those who are contributing materially to the system still seek inclusion in a more equitable and responsive social contract. Their expectations, if constructively acknowledged, represent an opportunity to reinforce cohesion through renewed trust, shared responsibility, and balanced delivery.

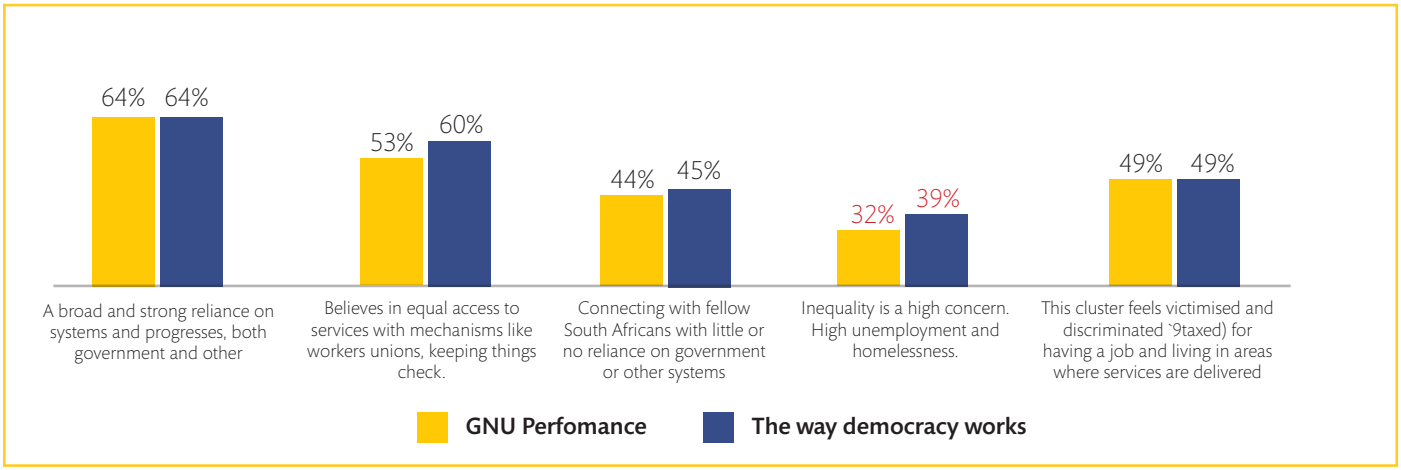
From a Nation Brand perspective, the emerging insights across the social cohesion clusters underscore the growing salience of economic inequality as a key fault line in shaping national unity. Social cohesion cannot be meaningfully sustained without inclusive economic growth, broad-based job creation, and greater equity in opportunity and access. If these structural challenges remain unaddressed, cohesion risks becoming fragmented along lines of material need and exclusion. The future strength of South Africa's Nation Brand, therefore, depends not only on values of unity and identity but on translating these into lived realities through economic participation and shared progress. For a more detailed view of how these dynamics manifest across provinces and population groups, refer to Annexure 2, which provides a provincial snapshot and demographic disaggregation of the social cohesion findings.

The Social Cohesion clusters measured against government performance and democracy

Looking beyond the clusters themselves to how each group views the performance of government under the Government of National Unity (GNU) and the functioning of democracy, distinct patterns emerge. The first cluster, which is defined by strong institutional trust and reliance on systems to maintain stability, holds a broadly positive view of both government performance and democratic governance, consistent with their belief in structured support and order. Cluster 4, which demonstrates a deep and principled concern for poverty and social inequality, reflects lower satisfaction with both government performance and democracy. Their sentiment suggests a disconnection between democratic ideals and the extent to which these ideals are being translated into meaningful outcomes for the most vulnerable.

Cluster 5 presents a more complex dynamic. While respondents in this group typically have access to essential services and infrastructure, they often feel overburdened and under-recognised. Their perception is shaped by a sense that, despite contributing to the system, they are unfairly carrying the cost of inefficiencies and limited delivery. The relationship with government is not defined by exclusion, but rather by a perceived lack of reciprocity, a feeling that their contributions are not matched by support, fairness, or visible recognition. This nuance underscores the importance of addressing not only gaps in access but also perceptions of equity and acknowledgment within the national effort to build cohesion and shared responsibility.

Figure 40: The Social Cohesion clusters measured against government performance and democracy

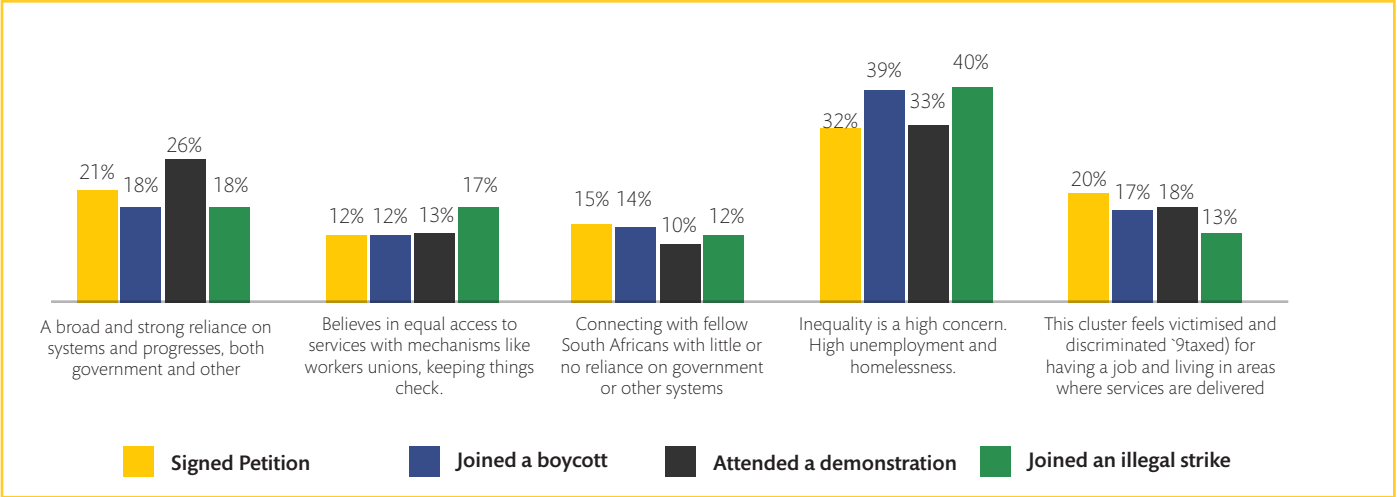


Source: Brand SA: State of the Nation Report 2024

Viewed from another perspective, the clusters most attuned to perceptions of inequality, Clusters 4 and 5, play an increasingly visible role in shaping public sentiment. While both express dissatisfaction with the way democratic institutions are functioning, the nature of their engagement differs. Cluster 4 tends to reflect a values-driven concern for broader societal

well-being, often grounded in empathy and a sense of justice for the economically excluded. Cluster 5, on the other hand, channels its frustration through a more individualized lens, shaped by perceptions of unfair burden and a lack of institutional reciprocity. Although their points of emphasis diverge, both clusters amplify critical voices in the national discourse, serving as important barometers of where the social contract is under pressure and where responsive governance, inclusive dialogue, and visible delivery are most urgently required.

Figure 41: The Social Cohesion clusters measured against willingness to take action

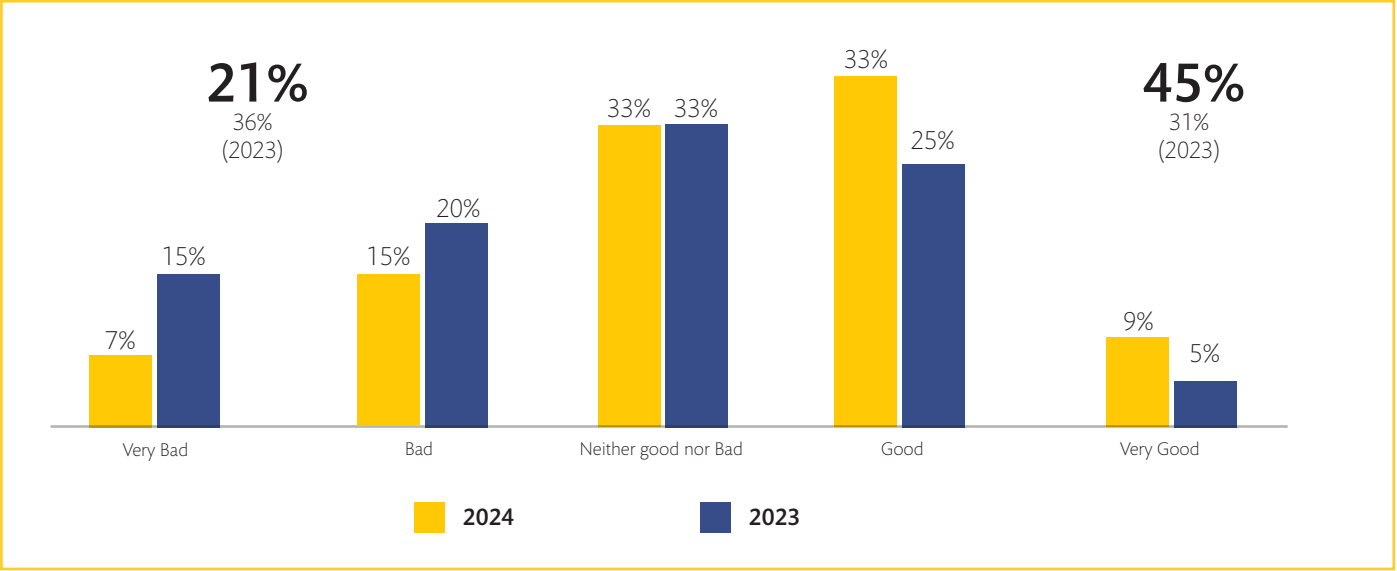


Source: Brand SA: State of the Nation Report 2024

Perceptions of Government's ability to build Social Cohesion

The 2023 data revealed a nation delicately balanced in its sentiment toward government efforts to foster social cohesion. Public opinion was nearly evenly split, with 36% expressing concern, 31% rating efforts positively, and 33% adopting a neutral stance. This distribution reflected a society in wait, measured, reflective, and attentive to how leadership translates vision into the unit

Figure 42: Government's ability to build social cohesion



Source: Brand SA: State of the Nation Report 2024

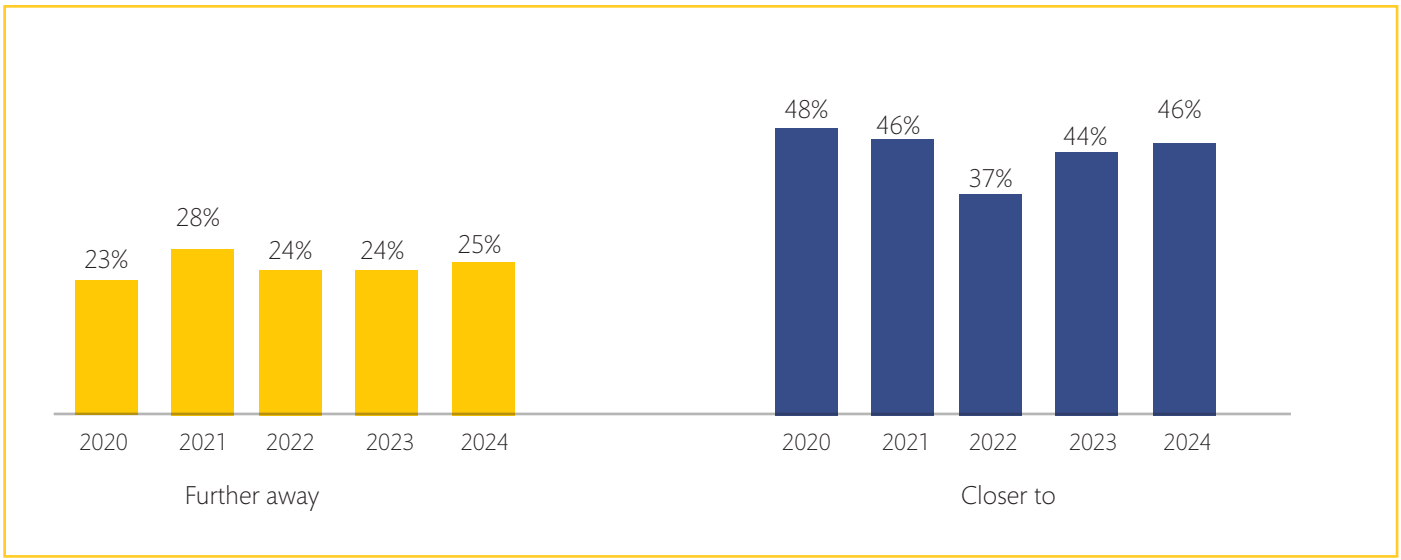
By 2024, the picture began to shift. The share of respondents who rated government efforts as "good" or "very good" rose to 45%, while negative sentiment decreased significantly to 22%. This 23-point swing toward positivity is not just a statistical improvement it reflects a rekindled belief in the country's direction, supported by a broader spirit of collaboration. Meanwhile, the 33% who remain neutral represent a discerning and engaged public hopeful yet measured. This segment reflects a healthy civic posture, one that supports national unity, while remaining attentive to delivery, inclusion, and accountability.

Much of this optimism coincides with the formation of the Government of National Unity (GNU), which appears to have restored confidence in South Africa's ability to move forward together. Citizens have responded positively to the inclusive approach and cross-party cooperation, viewing it as a fresh opportunity to strengthen the social fabric.

How South Africa inspires the nation

While the Government of National Unity has inspired many to believe that this spirit of cooperation can take root, its long-term impact will be measured by the extent to which it drives inclusive delivery, bridges divides, and creates shared value across society.

Figure 43: How South Africa inspires the nation



Source: Brand SA: State of the Nation Report 2024

The proportion of respondents who feel emotionally or socially closer to others rose slightly from 44% in 2023 to 46% in 2024, returning to levels last seen in 2020 and 2021. At the same time, those who feel further away from others has held steady at around 25% since 2022. While the trajectory is stable, it also signals a plateau—indicating that positive national outlooks have not yet fully translated into closer personal or communal ties.

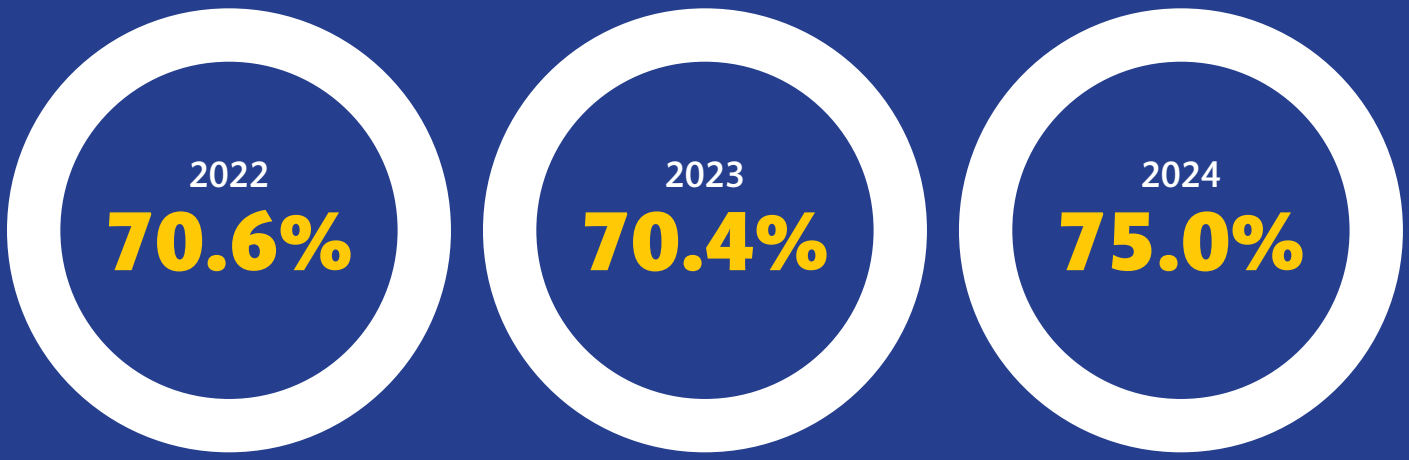
These findings suggest that while hope, safety, and optimism are increasing, the relational dimensions of social cohesion require more deliberate attention. Building stronger bonds among citizens across divides of class, culture, and geography demands more than positive sentiment. It requires a sustained, values-driven effort to foster mutual understanding, inclusion, and everyday connection.

Social Cohesion is a delicate and slow process to foster a sense of trust and goodwill among people to be willing to reach out, to build connections, and to develop partnerships. The government plays an enormous role in setting the tone for that to happen. The GNU has inspired many to consider that this may now happen. From a nation brand perspective, this highlights an ongoing opportunity: to bridge the gap between national optimism and personal connection. Promoting social unity will depend not only on trust in institutions, but also on strengthening empathy, shared identity, and everyday solidarity among people.

15. National Pride

The National Pride construct score is an especially sensitive indicator of the nation's emotional commitment to the country. The resurgence in national pride observed in the 2024/25 State of the Nation Brand Report is not only a reflection of renewed optimism under the Government of National Unity, but also a response to several defining national achievements. South Africa's global stature has been reinforced through its leadership in multilateral institutions, including hosting the BRICS Summit and AGOA Forum in 2023, and assuming the G20 Presidency in 2025. These diplomatic milestones have been matched by extraordinary cultural and sporting accomplishments. The Springboks' historic fourth Rugby World Cup win, Tyla's Grammy Award for Best African Music Performance, and Team South Africa's medal-winning performance at the Paris 2024 Olympics and Paralympics have reignited national pride. From cricket and football to swimming and athletics, these achievements affirm South Africa's standing as a resilient and high-performing nation, deepening collective belief in its potential and promise.

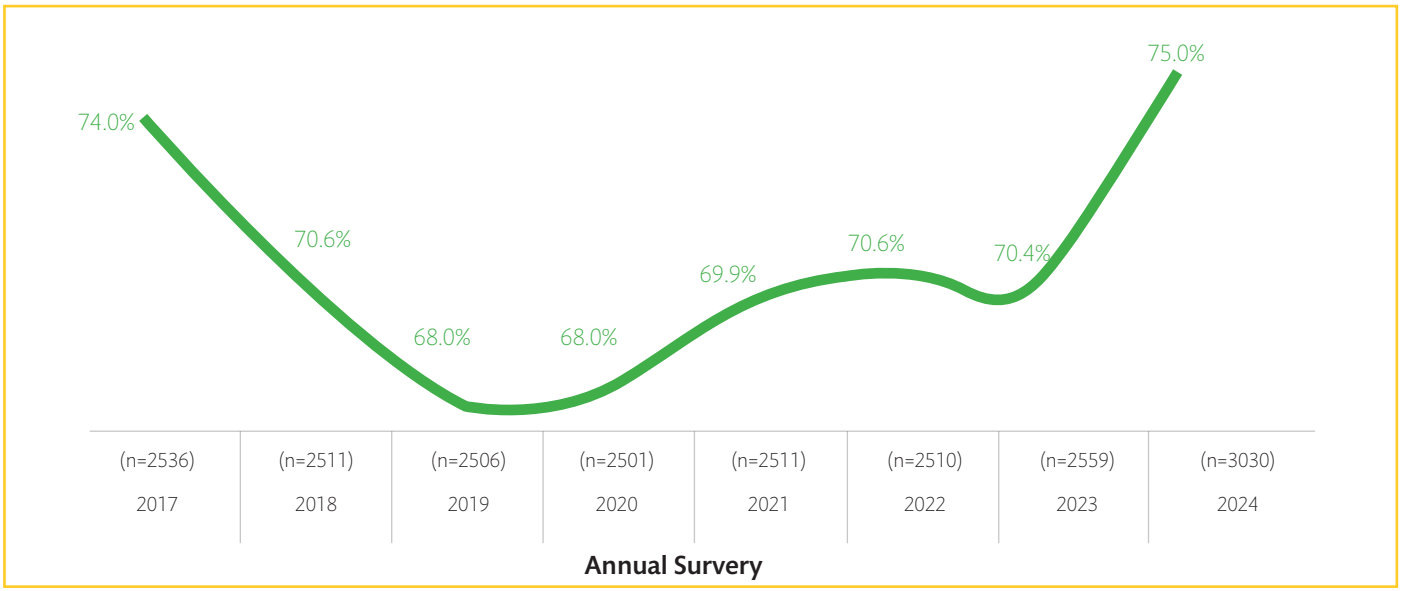
Table 6: Comparative National Pride construct scores



Source: Brand SA: State of the Nation Report 2024

The comparative national pride scores (Table 4 above) from 2022 to 2024 present a compelling narrative of a nation reawakening to a renewed sense of possibility and shared identity. Although the score dipped slightly from 70.6 in 2022 to 70.4 in 2023, it remained at a relatively high level, reflecting the resilience of public sentiment and the enduring pride South Africans continue to feel, even in the face of ongoing national challenges. In 2024, the index surged to 75.0, its highest level in nearly a decade. This rise signals not only a rebound in confidence but also a deepened sense of collective purpose, fuelled by the spirit of renewal ushered in by the GNU, South Africa's rising global stature, and a series of unifying cultural and sporting milestones.

Figure 44: Historic performance analysis of the National Pride construct



Source: Brand SA: State of the Nation Report 2024

The graph above illustrates that between 2017 and 2024, the National Pride Index underwent a dynamic national journey shaped by shifting public sentiment and evolving socio-political context. After starting at 74.0 in 2017, the index declined steadily to 68.0 by 2019 and remained at this low in 2020, mirroring a period marked by uncertainty, institutional strain, and a deepening sense of disillusionment. However, from 2021 onward, a slow but steady upward trend began to emerge rising to 69.9 in 2021, 70.6 in 2022, and holding at 70.4 in 2023. These incremental gains were given new momentum in 2024, when national pride surged to 75.0 the highest level in eight years. This significant leap signals not only a statistical rebound, but a renewed sense of collective belief in South Africa's future. While the establishment of the Government of National Unity has been an important inflection point, the rebound reflects more than political hope alone. It is underpinned by South Africa's reassertion of its global presence from its G20 Presidency to historic sporting victories, cultural milestones, and growing multilateral influence.

Importantly, the trend line tells a story of soft power in motion: the ability of a country to inspire trust, foster unity, and project optimism, even amid complex challenges.

That national pride peaked just months after the GNU was formed before many of its outcomes could take shape highlights also the symbolic weight of cooperation and the deep yearning for inclusive renewal Importantly, the upward trend reflects not just symbolic milestones, but the emotional dividends of soft power that is the ability of a country to inspire, unify, and project credibility at home and abroad.

In this year's analysis, the number of national pride clusters remains at four, consistent with 2023 (see Table 5 below). The first two clusters emerge as strong drivers of pride: the first reflects a sense of identity tied to South Africa's global leadership and national role, while the second captures pride as a shared way of life rooted in common values and everyday behaviours. The third cluster appears more fragmented, likely shaped by context-specific factors, while the fourth is vague and lacks clear definition. Collectively, the first two clusters account for slightly more than half of the population, representing 55% of respondents.

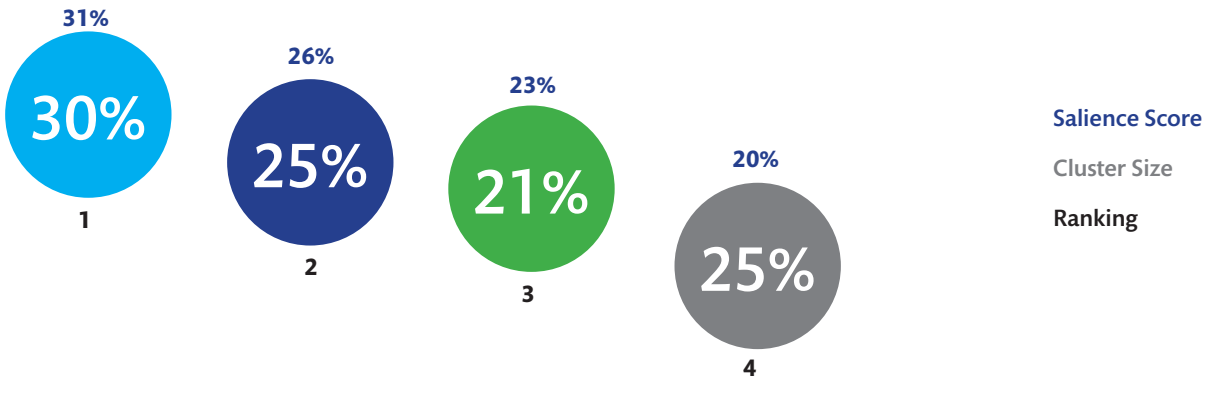
Table 7: The National Pride clusters identified in 2024

Number	National Pride Construct Clusters
1	South Africa's achievements, socially, politically, and economically both locally and internationally as a diverse nation (30%)
2	Pride is a characteristic, motivated by a unique spirit of being South African: Ubuntu, diversity, innovation, possibility that is unmatched (25%)
3	South Africa is a beautiful place with great sport, art, science and other talents. There are concerns, but these are special moments (21%)
4	South Africa is recommended as a place to work, travel, study and invest. Although less specific, it remains optimistic (25%)

Source: Brand SA: State of the Nation Report 2024

The first cluster South Africa's achievements socially, politically, and economically both locally and internationally as a diverse nation represents the most prominent and influential source of national pride, both in terms of cluster size (30%) and salience (31%). This is a deep and historically grounded expression of pride, reflecting not only what the country has achieved but also what it could become. It captures the nation's potential across multiple domains and stands as one of the clearest articulations of soft power in the national psyche. Almost one in three South Africans identify with this view, anchoring their pride in the country's capability and international standing.

Figure 45: National Pride cluster attributes depicting the size and importance of the clusters



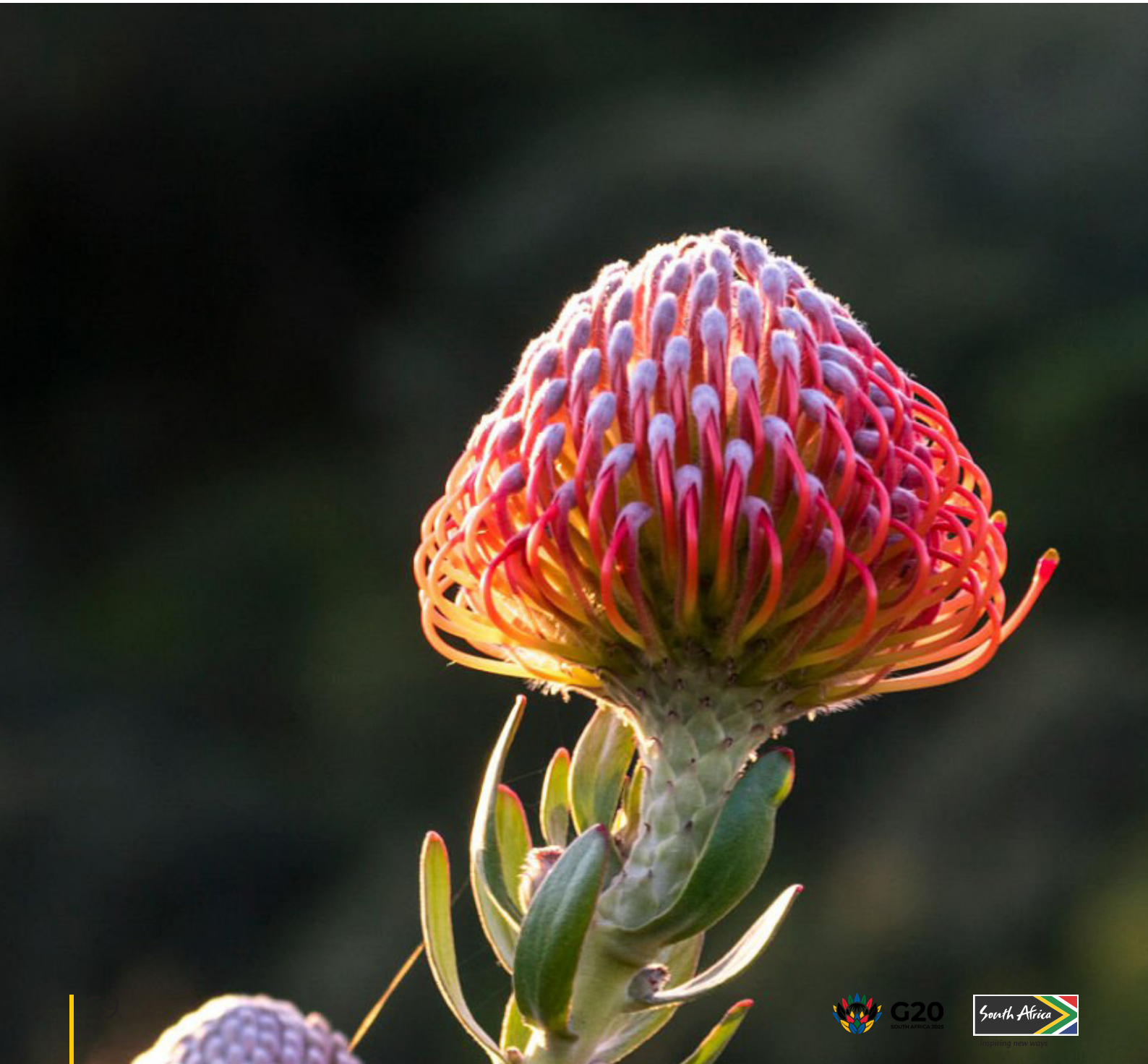
Source: Brand SA: State of the Nation Report 2024

The second cluster, pride as a characteristic, is motivated by a unique spirit of being South African: Ubuntu, diversity, innovation, and possibility. This reflects pride rooted in the country's distinctive identity. This cluster (25% size, 26% salience) carries a confident, even bold tone that celebrates the emotional and cultural fabric of South Africa. It is a pride that grows progressively stronger with each layer from shared values like Ubuntu to the ingenuity, diversity, and promise the nation represents. Together with the first cluster, these two account for more than half (55%) of the population, underscoring their centrality in shaping the national mood.

The third cluster, pride in South Africa as a beautiful place with talent in sport, art, science, and innovation, accounts for a smaller segment (21%) with a slightly lower salience (23%). This cluster reflects episodic expressions of pride often triggered by individual or group achievements on the global stage. While powerful in moments of celebration, such as international sporting or artistic triumphs, this pride is typically event-driven and less persistent over time. Nevertheless, it remains an important emotional lever, offering symbolic affirmation of national potential.

The fourth cluster, which is South Africa as a recommended destination to work, travel, study, and invest, comprises 25% of the population but has the lowest salience score (20%). This cluster is outward-looking, positioning the country as a destination of choice. Although less emotionally charged, it represents a strategic expression of pride aligned with international engagement. It reinforces how global perceptions of South Africa as open and aspirational can shape internal confidence, even if the sentiment lacks the depth and immediacy of the other clusters.

Together, these clusters offer a multidimensional view of how South Africans relate to their country. The first two embody deep-rooted beliefs and emotional conviction, while the third and fourth reflect pride shaped by moments and perceptions. This layered structure illustrates how different pathways to pride contribute to building a unified and resilient Nation Brand.



16. Active Citizenship

The Active Citizenship Index provides a sharp and revealing lens into how South Africans are translating sentiment into action not merely through rhetoric, but through purposeful civic engagement. It reflects the extent to which citizens feel empowered to shape their communities, influence systems, and participate in building a responsive and accountable society. In many respects, it is the most visible expression of national pride and social cohesion in motion.

Active citizenship, however, is inherently more complex than national pride. It encompasses a broad spectrum of activities from voting in national and local elections to organising community initiatives, volunteering, or participating in civic forums. This breadth is what makes active citizenship such a dynamic and adaptive construct. A pivotal factor in shaping South Africa's active citizenship narrative has been the emergence of localised community structures, developed in response to gaps in municipal service delivery. These formations, many of which gained momentum following the 2021 riots and unrest, initially emerged as fragile interventions but have since evolved into more resilient systems of collective action and neighbourhood-based governance.

Against the backdrop of this evolving civic landscape, 2023 marked a notable departure from the overall downward trajectory observed across many indicators. While other constructs stagnated or declined, active citizenship recorded a significant upward shift between 2022 and 2023 a positive trend that continued into 2024. This rise coincides with the national elections, which rekindled civic dialogue and rejuvenated democratic participation. Interestingly, while official IEC figures noted a decrease in voter turnout, the Active Citizenship Index itself rose suggesting that civic engagement may now be extending beyond the ballot box to include a wider array of participatory behaviours. Several of these actions are further explored in the sections that follow.

Table 8: Comparative Active Citizenship construct scores

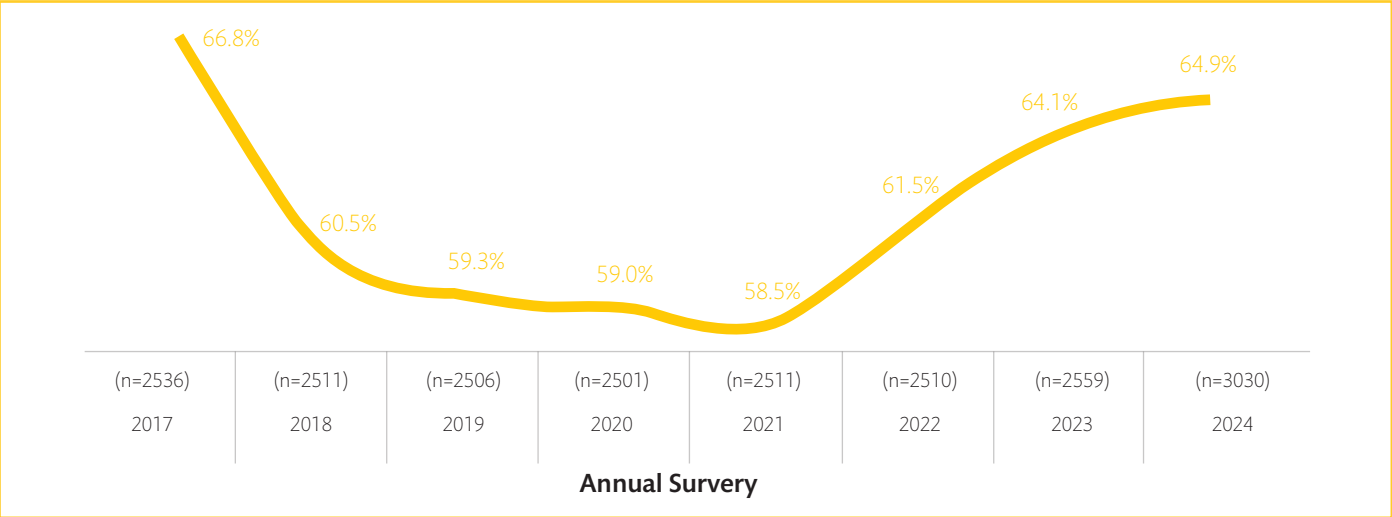
2022	2023	2024
61.5%	64.1%	64.9%

Source: Brand SA: State of the Nation Report 2024

The annual benchmark scores for Active Citizenship between 2022 and 2024 illustrate a steady and encouraging upward trend. From 61.5 in 2022 to 64.1 in 2023, and rising further to 64.9 in 2024, the data reflect a growing sense of civic agency among South Africans. While modest, these gains are significant in the post-pandemic context and suggest a maturing civic culture, where active citizenship is increasingly seen as a shared responsibility for national development.

The Active Citizenship Index offers a clear lens into how South Africans are moving from intention to action not merely expressing belief in the country but actively participating in its renewal. Between 2017 and 2021, the Index declined from 66.8 to a low of 58.5, reflecting a period marked by institutional strain and diminished public confidence. However, since 2022, the scores have shown a consistent and meaningful upward trajectory: 61.5 in 2022, 64.1 in 2023, and 64.9 in 2024. This trend signals a gradual but steady rebuilding of civic engagement. These gains underscore the resilience of communities and the growing momentum of grassroots efforts to fill service delivery gaps, especially in areas where municipal systems have been under pressure. Importantly, they also reflect the maturing of local initiatives that first emerged in response to social unrest and disruption. While the Government of National Unity since its establishment in 2024 continues to consolidate its role, the data indicates that many citizens are no longer waiting for formal structures to act instead they are embracing a spirit of shared responsibility and local agency. This evolving civic culture enhances South Africa's nation brand by demonstrating that, even amid complexity, the country's people remain committed to building stronger, more inclusive communities. It is a narrative of practical hope grounded in action, driven by belief, and reflective of a democracy that continues to deepen through lived experience.

Figure 46: Historic performance analysis of the Active Citizenship construct



Source: Brand SA: State of the Nation Report 2024

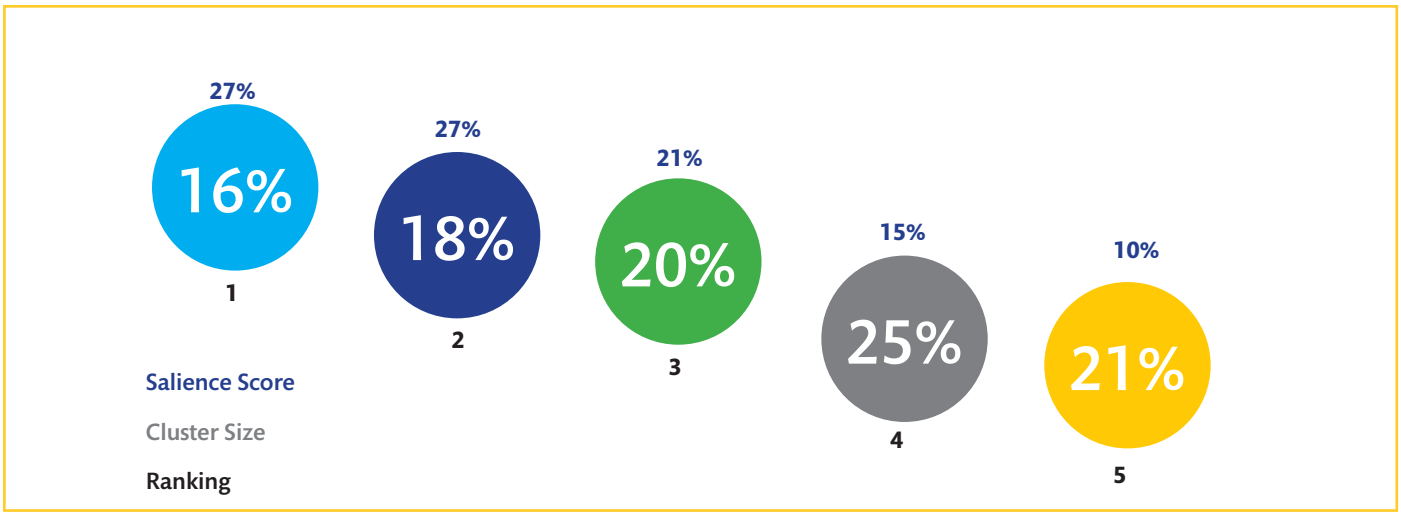
In 2024, five distinct clusters emerged (see table 7 below) within the Active Citizenship construct, reflecting the broad spectrum of civic engagement across the country. These clusters range from loosely formed initiatives to well-structured and resilient community systems. They follow a logical sequence in terms of the intensity and maturity of participation. A notable distinction arises between Cluster 2 and Cluster 3. While both indicate active civic involvement, Cluster 3 represents what scenario planners often refer to as a "social enclave" a protected and self-sustaining space where trust between citizens and government is high, and civic interaction is seamless. Cluster 2, by contrast, is driven more by moral commitment and grassroots solidarity, often operating independently of formal systems.

Table 9: The Active Citizenship clusters identified in 2024

Number	Active Citizenship Clusters
1	Community activities are starting but still unorganised and unstructured. Reliance on government but holding accountable (16%)
2	A positive and strong commitment to help others. Standing strong on principles, and with limited government interaction (18%)
3	Well-functioning communities where interaction and mutual exchange between government and citizens are efficient (20%)
4	A personal network has been established and are active. The groups are a little isolated, but active nonetheless (25%)
5	Community life is hard. Social, criminal, political and community fragmentation and degradation. (21%)

Source: Brand SA: State of the Nation Report 2024

Figure 47: Active Citizenship cluster attributes depicting the size and importance of the clusters



Source: Brand SA: State of the Nation Report 2024

Cluster 1: Community activities are starting but remain unorganised and unstructured:

This cluster represents 16% of the population but holds a high salience of 27%, is ranked first due to the strength of its conviction despite its smaller size. This group recognises the emergence of community activities, although these remain largely unorganised and unstructured. There is a foundational reliance on government, but it is coupled with a clear expectation of accountability. Many of these actions are still in their early stages, often coordinated via informal platforms like WhatsApp groups. The significance of this cluster lies in its transformative potential—the recognition that change begins locally, even if incrementally.

Cluster 2: A strong commitment to help others, grounded in principle and with limited government interaction:

This cluster comprising 18% of the population and marked by a high salience of 27%, reflects a more advanced form of engagement. These citizens demonstrate a strong, principled commitment to helping others, often operating independently of government support. Their initiatives are typically self-organised and arise from a sense of collective duty. As the second smallest in size but tied in salience with Cluster 1, this cluster can be viewed as a matured progression of the first that reflects stabilised local leadership and the institutionalisation of civic responsibility.

Cluster 3: Well-functioning communities with effective mutual exchange between government and citizens:

Accounts for 20% of the population with a slightly lower salience of 21%. It describes well-functioning communities where collaboration between government and citizens is efficient and mutually beneficial. These communities are marked by strong ward councillor engagement, responsive political structures, and the willingness of residents to work constructively with formal systems. Often referred to in scenario planning as "social enclaves," these areas tend to be more resourced, with higher infrastructure reliability and better service delivery. A notable concentration exists in the Western Cape, reflecting internal migration patterns and skewing towards predominantly white communities living in gated or security estates.

Cluster 4: Isolated but active personal networks.

The largest cluster at 25% of the population but with a salience of only 15%, reflects fragmented civic engagement. These communities have formed smaller, often informal networks that operate in isolation from broader community dynamics. Activities resemble stokvels or purpose-driven groups, typically built around existing relationships. While active, these groups face systemic constraints, including limited external buy-in and tough socio-economic conditions that hinder growth.

These small "islands of action" offer potential but remain vulnerable without broader community integration or formal support.

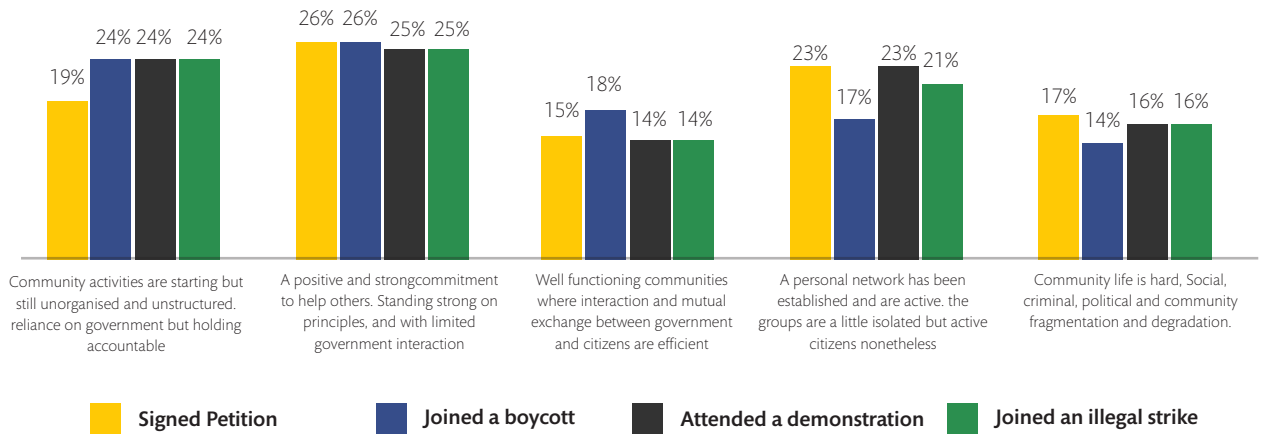
Cluster 5: Community life is hard marked by social, political, and structural fragmentation:

This cluster represents 21% of the population but ranks lowest in salience at just 10%. It captures communities where life is characterised by hardship and fragmentation. These are areas experiencing significant social and infrastructural breakdown marked by high unemployment, substance abuse, crime, and a general sense of stagnation. In these communities, the conditions for active citizenship are severely eroded, with few resources or platforms available to spark or sustain action. The emotional fatigue and material deprivation seen here speak to the urgent need for targeted, inclusive interventions to restore civic hope.

Given the ranked order of the clusters, it is useful to understand the level of activism across the active citizenship clusters. Clusters one and two are the most active in demonstrations, petitions, boycotts, and strikes. Cluster one is a little younger or has been established more recently than cluster two. Cluster three, the social enclaves, is the least involved in protest actions. Cluster four partakes selectively based on the purpose and network reach of the cluster. It is interesting that intuitively one would have thought that cluster five would be the greatest %ages of boycotts, petitions, demonstrations, and strikes; however, that is not the case. It is as if the last cluster has given up, or there are so many things wrong that it does not matter what one raises a petition for.

16.1 Active citizenship clusters and levels of activism

Figure 48: Active citizenship clusters and levels of activism

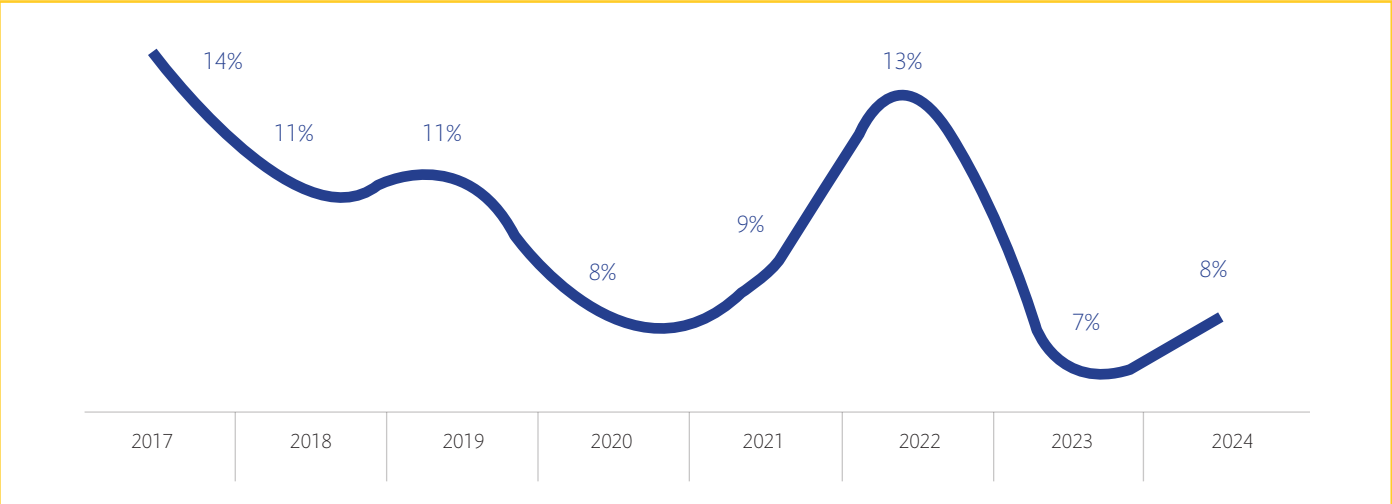


Source: Brand SA: State of the Nation Report 2024

In the next two sections of the Active Citizenship narrative, the level of activeness is illustrated in two ways. The first is to understand at what level, and the second is how intense.

For the first analysis, at what level of active citizenship, the following graphic illustration of one attribute, "I'm actively helping people on a regular basis," highlights the variance from year to year and illustrates how the nation responds to changing circumstances. The changing circumstances encourage or dampen the willingness to reach out to those in need. The more severe the circumstances, the less likely people are to be willing to help others. Starting from a high in 2017, the impact of the state capture and corruption expose resulted in a lower level of interaction, which continued into 2019. In 2020, amidst COVID-19, this decreased further as a result of social distancing and the fear of getting ill, which continued into 2021. In 2022, when all economic activities resumed, people engaged with one another, but as the political developments in the run-up to the elections started to emerge, activities stalled rapidly and reached an all-time low in 2023. In 2024, amidst rekindled hope, the score recovered somewhat.

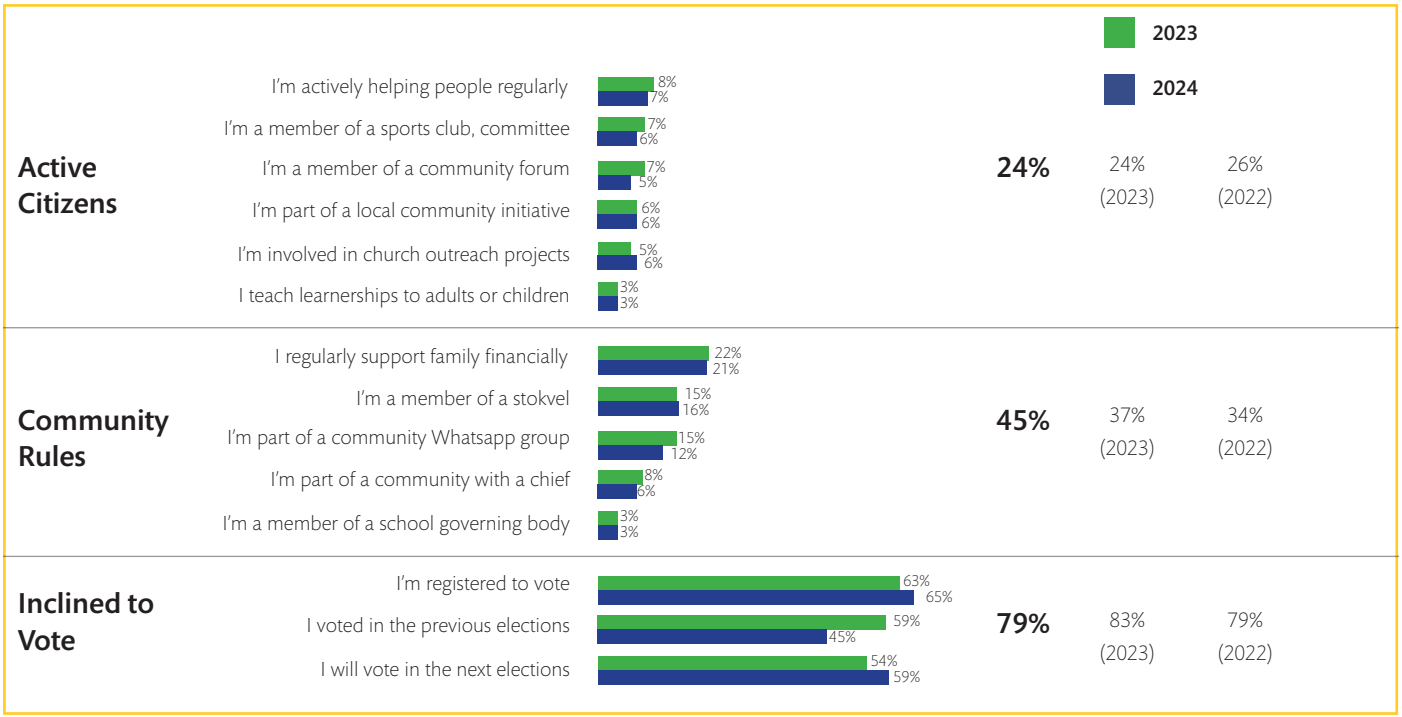
Figure 49: Willingness to actively help other people regularly over time



Source: Brand SA: State of the Nation Report 2024

Active citizenship directly correlates with how safe and secure people feel. The safer and secure people feel, the greater the likelihood that they will reach out to a fellow South African. With that understanding, what was the performance of the other statements and how are these classified?

Figure 50: Comparative level of active citizenship over the last three years



Source: Brand SA: State of the Nation Report 2024

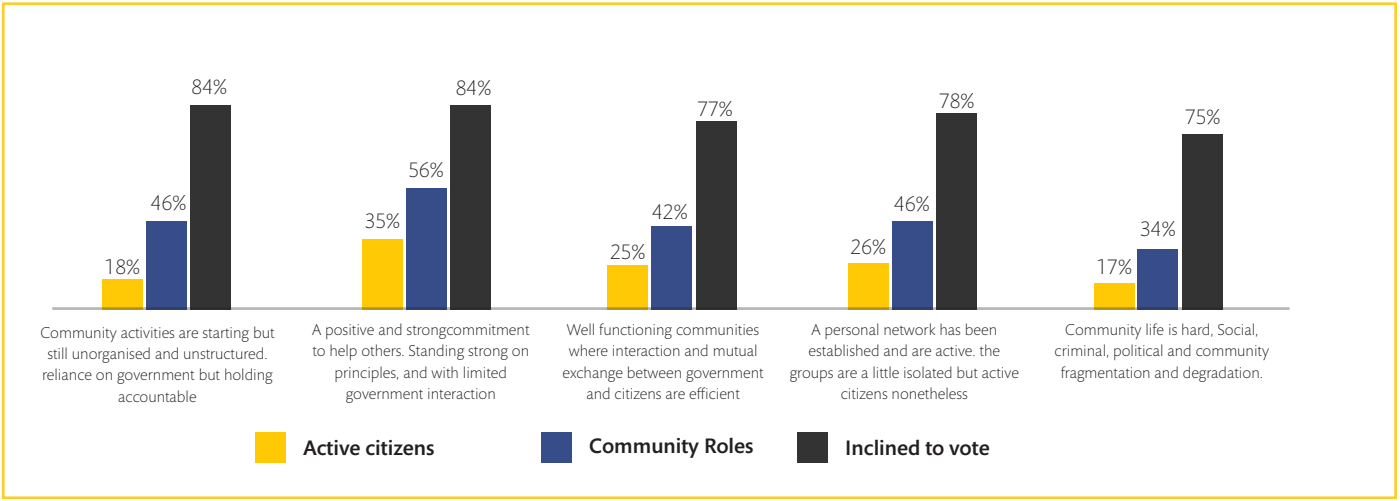
The first comment, in line with data performance, is that according to the IEC, the voter turnout for the 2024 national elections was 58.64%. In this Brand South Africa national survey, those that voted in the May 2024 elections was 59%.

Active citizens, the first grouping, has a collective score of 24% with a stable history. The community roles increased year-on-year. It is safer and more convenient to be part of a group than to help on an individual basis. The largest part of this group focuses on family needs.

The inclined to vote decreased following the build-up to the elections in May 2024.

When these groups are compared with the Active Citizenship clusters, two points are important to raise. The first is that cluster two have the highest Active Citizens (35%) and Community roles (56%). This is expected and confirms the nature of the clusters in description but also statistically. The second, counterintuitive, is the expectation that cluster five will at least vote during elections, however this is not happening. These communities express a sense of having given up on wanting to improve things.

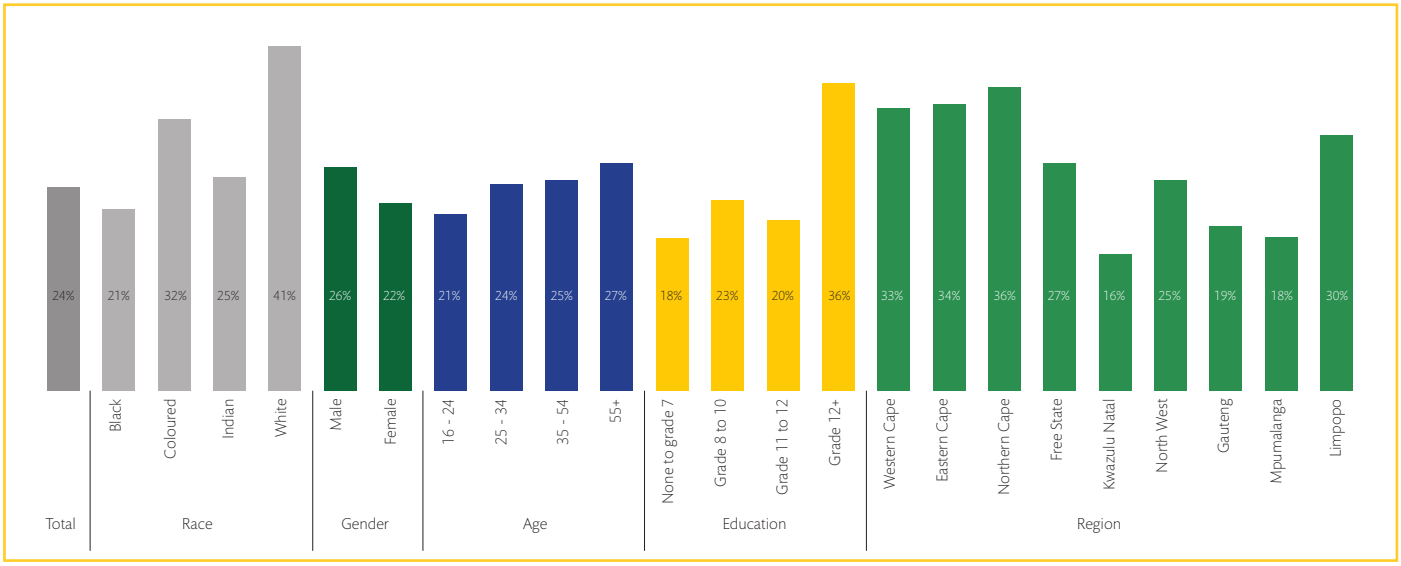
Figure 51: Level of active citizenship compared with the construct clusters



Source: Brand SA: State of the Nation Report 2024

Looking at the three groups, Active Citizens, Community Roles, and Inclined to Vote separately, the first is Active Citizens. This profile has traditionally been associated with the more affluent, who have the means to support others; this trend remains as such. Furthermore, this profile has a stronger male presence, whereas the next cluster, community activities, has a stronger female focus, which remains stable. The white community is almost double the strength of the group.

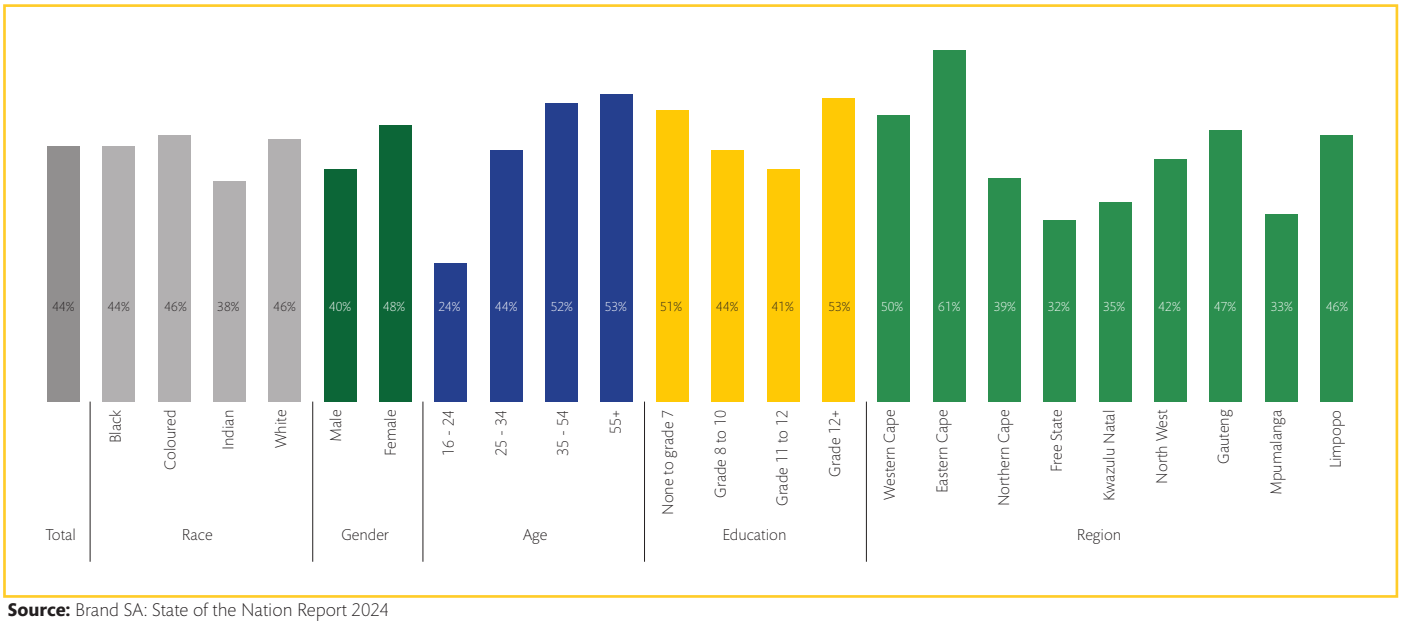
Figure 52: The active citizen's demographic profile



Source: Brand SA: State of the Nation Report 2024

The community role is more likely to be female and older. The community role is most likely less accessible to younger people. This seems to be the pattern in which the active citizenship involvement works and how integration starts. One starts with community roles before getting involved at a personal level.

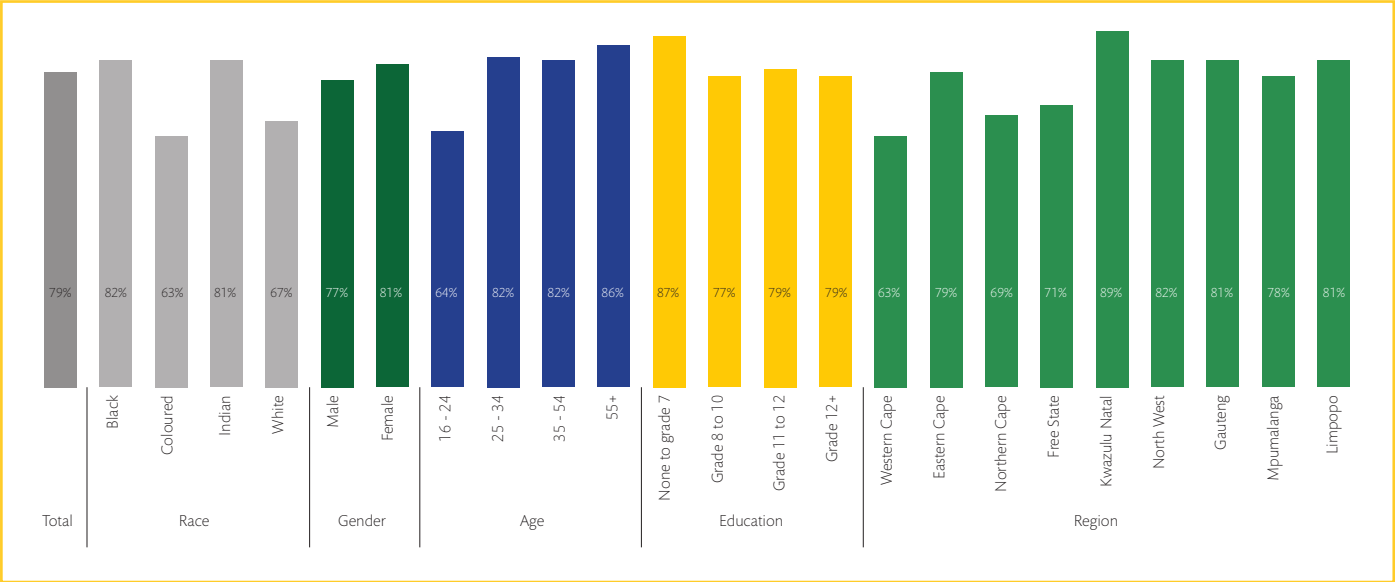
Figure 53: The community role demographic profile



Source: Brand SA: State of the Nation Report 2024

The final group, the inclined to vote are the majority of the population, 79%. It was slightly higher in 2023 in anticipation of the elections. The score is now back to what it was in 2022, before the elections. The performance of the GNU may influence what happens closer to the next elections.

Figure 54: The inclined to vote demographic profile



Source: Brand SA: State of the Nation Report 2024

Looking at the active citizenship dynamic from a different angle, the activities are clustered into three groups, personal activities, strong activities, and support activities. Seventeen attributes were measured and used in the classification process.

Personal activities increase year-on-year as the largest group by a small margin. Interesting to note that the strong activities increased from 16% to 26%.

The no-activity grouping decreased from 70% to 55%, supporting the increase in the personal and strong activities.

Figure 55: Intensity of active citizenship activities

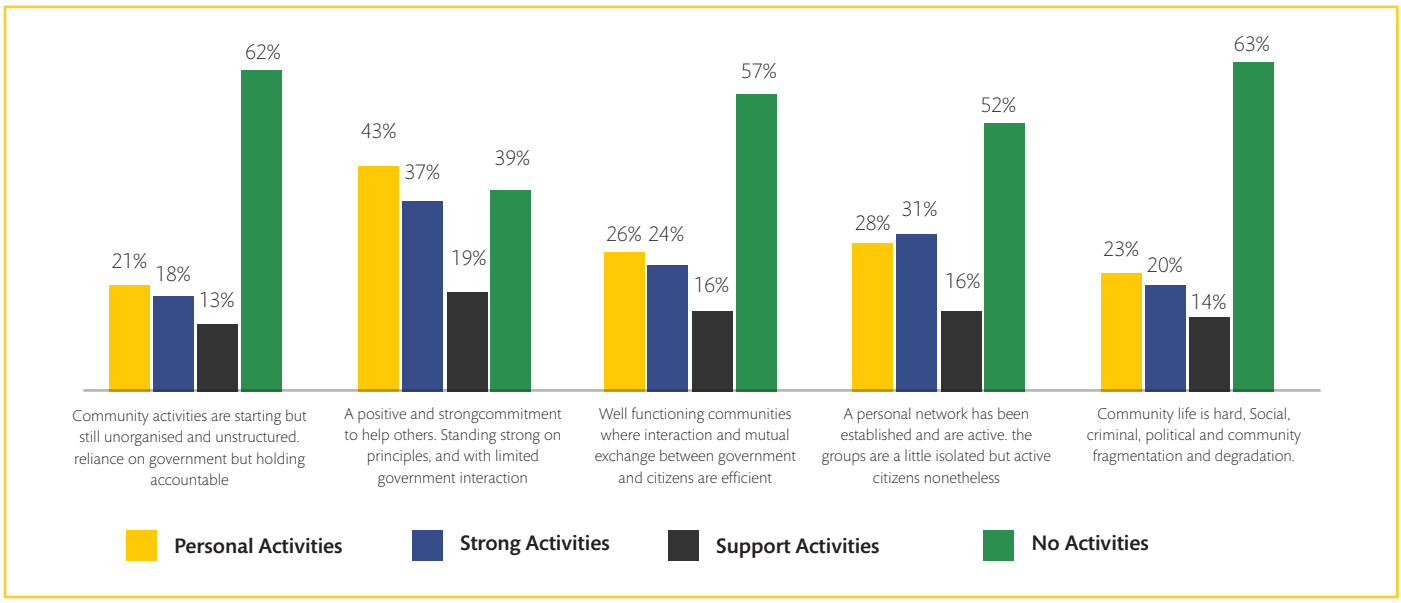
Personal Activities	Helped the poor in whatever way	14%	**28%**	24% (2023) / 17% (2022)
	Helped an unemployed person find a job	8%		
	Helped with sports atvities	6%		
	Provided health care	6%		
	Reached against poor working conditions	4%		
Strong Activities	Acted against any form of crime	11%	**26%**	16% (2023) / 12% (2022)
	Aacted against any form of abuse	8%		
	Acted against any form of discrimination	7%		
	Took action against poor education	5%		
	Acted against any form of animal abuse	5%		
	Acted against any environmental damage	5%		
	Acted against poor service delivery	4%		
	Helped to improve circumstances in the area	4%		
	Acted against how the country is governed	3%		
Support Activities	Encouraged or challenged someone to be truthful	8%	**16%**	17% (2023) / 13% (2022)
	Supported someone to stand up for their rights	7%		
	offered support through a chruch	6%		
	No activities in the past 6 months	55%	**55%**	61% (2023) / 70% (2022)

Source: Brand SA: State of the Nation Report 2024

Similar to what was seen previously, the second cluster, "A positive and strong commitment to help others," has the most personal activities, strong activities, and support activities. The no activities %age (39%) is lowest for this group. An interesting difference is that cluster three, well-functioning communities, has higher %ages for the activity groups than cluster one. In other words, when communities function well, activities or willingness to be active increase. This links up with the notion expressed that when people feel safe and secure, they are more willing to reach out. Furthermore, the last cluster, community life is hard, records the highest %age of no activities, in line with what was seen earlier.

The fragmented nature of cluster one illustrates the enormous effort it takes to build momentum and to mobilise the community. The small islands of actions with limited and dynamic leadership structures need to convert the high no activity %age into personal, support or strong activities.

Figure 56: Activity intensity against the five active citizenship clusters



Source: Brand SA: State of the Nation Report 2024

The first cluster of communities' activities is just beginning to take shape. These areas are characterized by unstructured efforts and a reliance on the government, coupled with a desire to hold it accountable. Here, civic engagement is moderate and evenly spread; about 24% of individuals report signing petitions, joining boycotts, or attending demonstrations. It's a sign of people waking up to collective action, even if the path forward isn't yet fully clear.

In contrast, the second cluster paints a picture of passionate commitment. These communities show the highest levels of civic participation, 25% – 26% across all forms of protest. Their motivation is rooted in strong principles and a willingness to help others, even without depending on government support. This is where activism thrives, driven by values, solidarity, and a deep sense of responsibility.

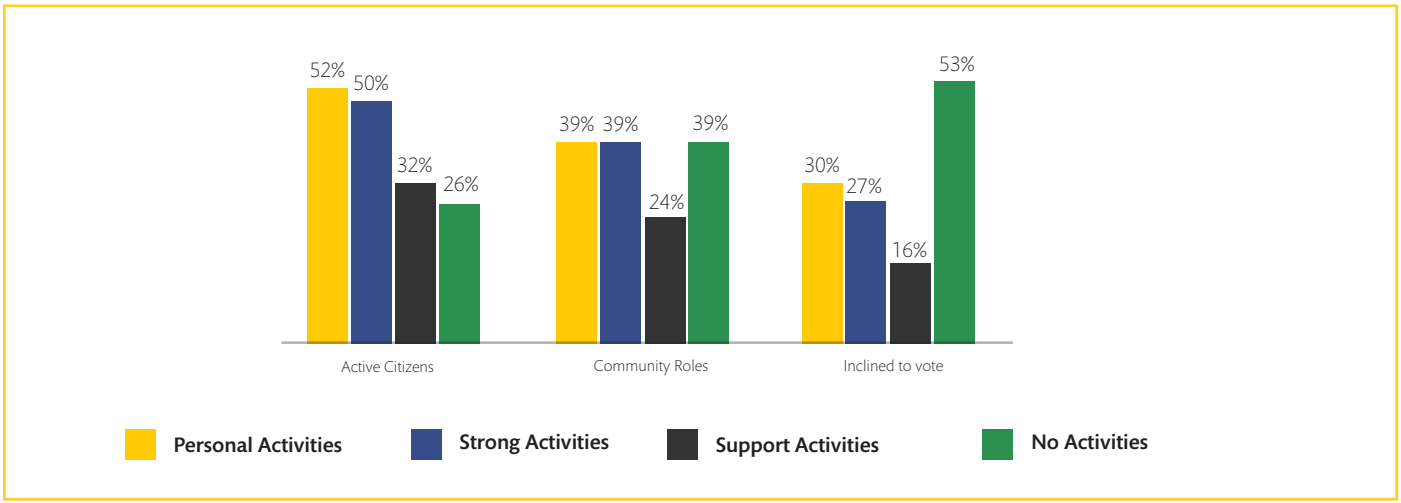
Then there are the well-oiled communities in the third cluster places where government and citizens interact efficiently. These communities show the lowest levels of demonstrations and strikes, hovering around 14%. It's not that people are apathetic, but rather that the system seems to be working. When things are functional, the need for protest naturally diminishes.

The fourth group consists of communities that are somewhat isolated but still active. They have established personal networks and tend to participate more in petitions and boycotts than in public demonstrations. This suggests a quieter, more selective form of engagement — action taken within close circles rather than through broad social movements.

Finally, the fifth cluster reflects a more difficult reality. In communities struggling with social fragmentation, crime, and political degradation, civic engagement is the lowest across all metrics. Around 16% – 17% report participating in any form of activism. It's a sobering reminder that when communities are fractured and morale is low, the energy for collective action can fade.

In a cross-tabulation view, it is clear that the active citizens are well versed in personal, strong and support activities. Compare this to the inclined to vote group, the no activities dominate.

Figure 57: Level of active citizenship against intensity of active citizenship



Source: Brand SA: State of the Nation Report 2024

In conclusion, active citizenship is dependent on the conditions and circumstances in the communities. The willingness of ordinary citizens to reach out has to have a sense of safety before that will happen. One can expect that the more difficult the community is to work in, the less likely the general public will participate, and the more likely that this space will eventually be filled by NGOs.

Therefore, hope in the potential impact the GNU may have will not move the needle much on the active citizenship construct. Until the work of the GNU starts having a positive impact at community level, active citizenship will remain constrained.

17. Brand South Africa and media

Brand South Africa's awareness level increased from 20% to 29% to the current 37%, almost back to its former strength in 2021 at 38% and before that in the lower 40% range. The same is seen in the South African logo and slogan ""Inspiring New Ways".

Play Your Part, the flagship active citizenship initiative also saw an improvement although less pronounced. The Constitutional Awareness campaign is the only counter brand awareness trend, declining from 18% to 11%.

Table 10: Brand awareness over the last three years

Brand SA	Inspiring New ways	Play Your Part	Constitutional Awareness
2024	2024	2024	2024
37%	60%	43%	11%
2023	2023	2023	2023
29%	48%	35%	18%
2022	2022	2022	2022
20%	22%	20%	10%

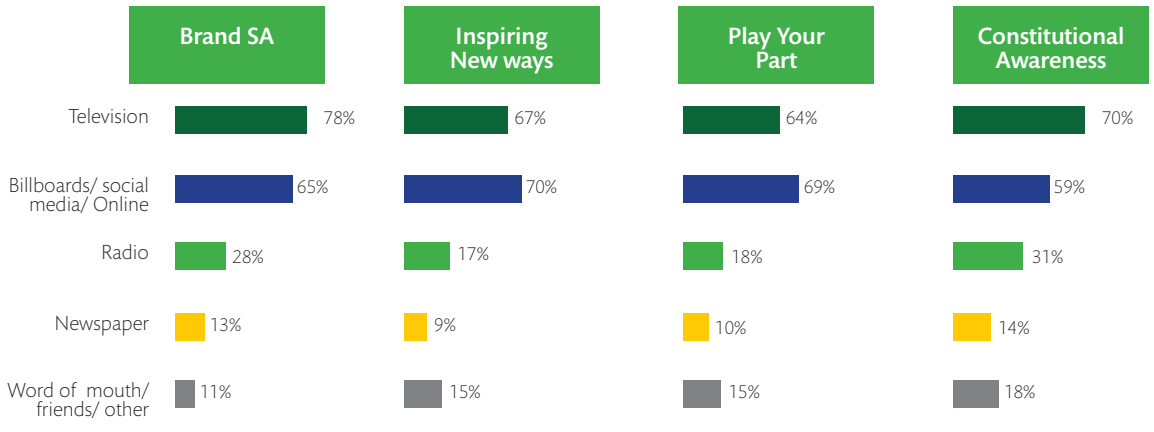
Source: Brand SA: State of the Nation Report 2024

Last year, the average difference between television and the second group "Billboards/Social Media/Online" was 29%, this year it is 4%. Across almost all campaign platforms, social media is gaining momentum over television. Social media will be separated from the cluster in subsequent years to monitor this space more effectively, should this trend continue.

Radio is very difficult as there are so many with different audience sizes and reach that it is expected to be lower. The ideal is most likely a multi-stream campaign where several platforms are engaged.

Media strategies and developments have changed over the years. As seen later in this section, almost all social media platform usage increased between 2023 and 2024. Paid streaming platforms have become expensive to the average consumer, there is so much content on social media platforms that streaming services could be seen as complementary rather than essential.

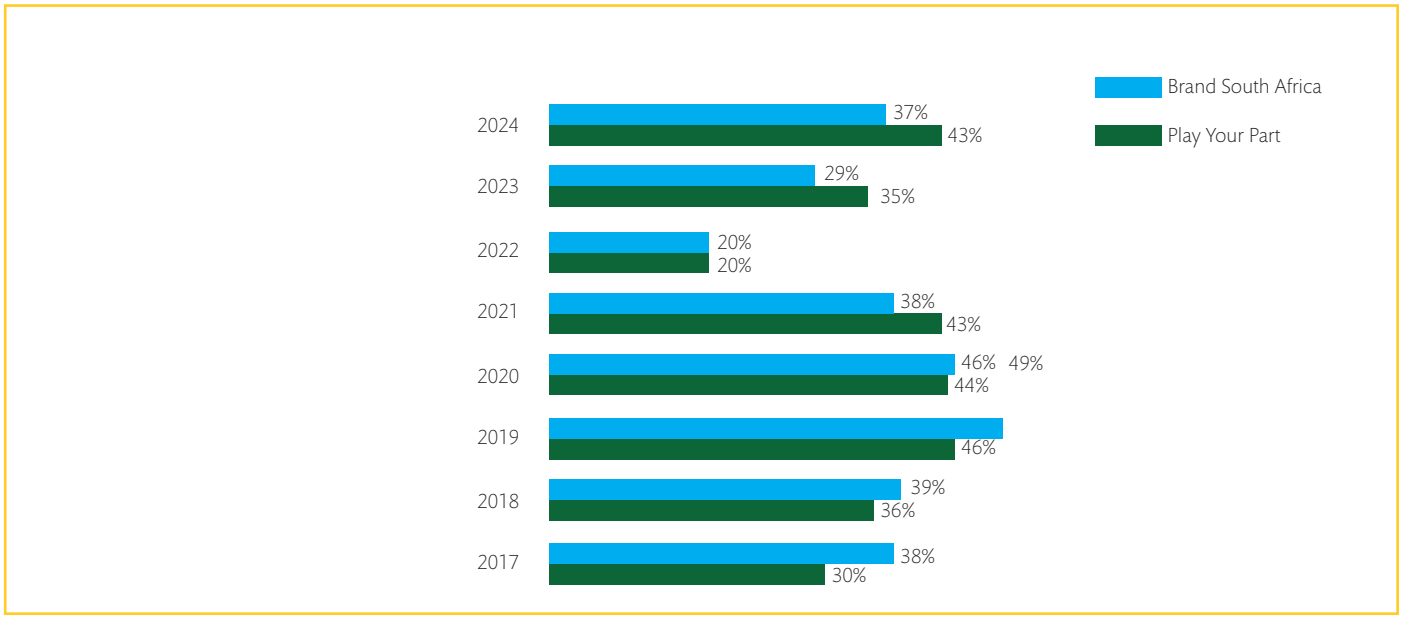
Figure 58: Awareness of brands across media platforms



Source: Brand SA: State of the Nation Report 2024

In a trended Brand South Africa and "Play Your Part" (PYP) awareness analysis, awareness of PYP showed significant gains in the initial years when the programme was launched and strongly marketed with celebrity ambassadors. The PYP retained awareness during 2020 and 2021 but declined sharply in 2022. The campaign has regained most of the lost ground since 2021 and increased awareness ahead of the custodian Brand South Africa. These are good recovery strategies implemented by Brand SA.

Figure 59: How South Africa inspires the nation

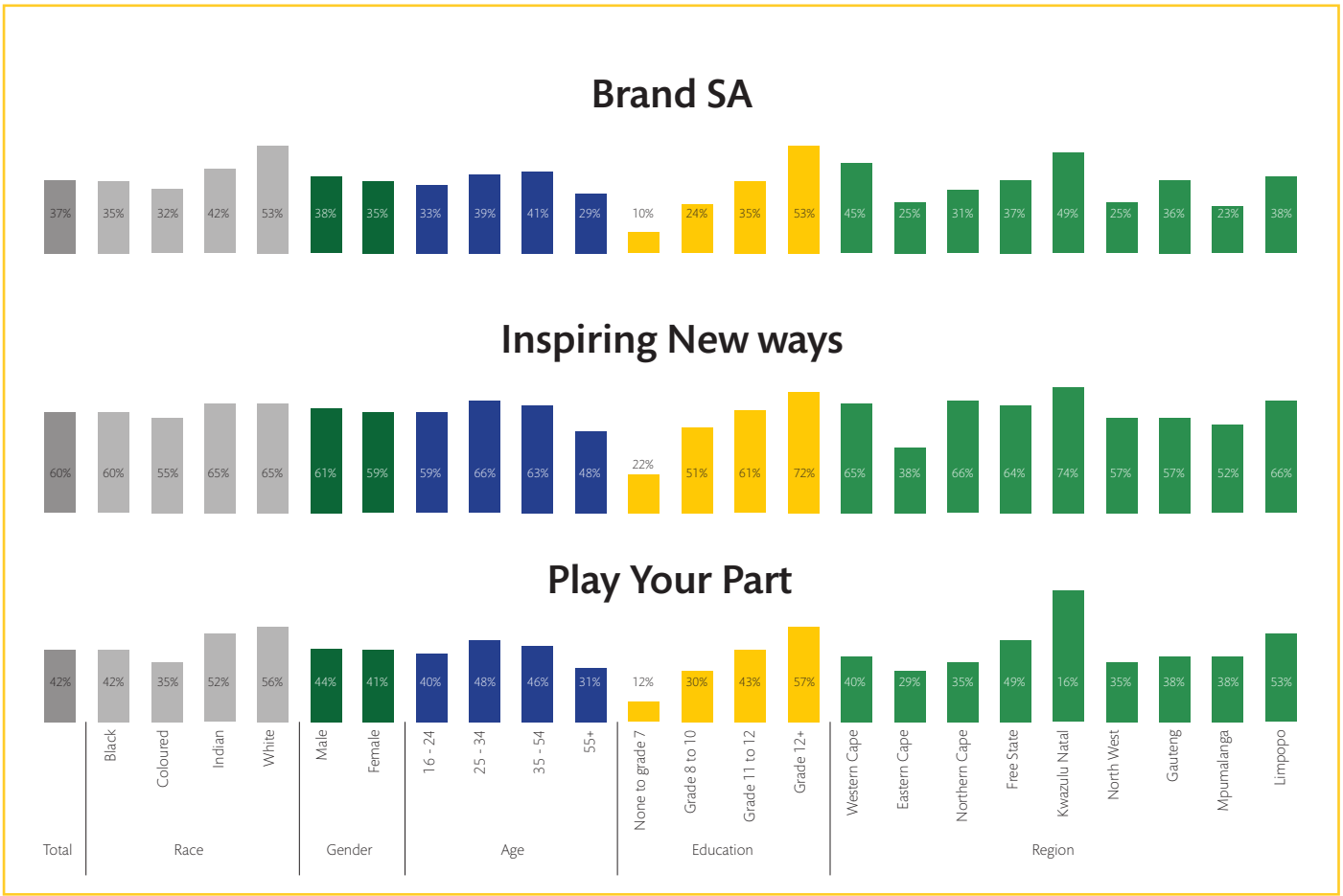


Source: Brand SA: State of the Nation Report 2024

All three main brands, "Brand South Africa", "Play Your Part", and the country's slogan "Inspiring New Ways" all share similar demographic profiles. It is particularly noted in the level of education. This is a real concern for the PYP strategy, the pockets of society the PYP aim to reach are least aware of the brand.

It should perhaps be considered that community radio discussions, interviews and promotions be launched to get closer to the people and rely on word-of-mouth strategies to get the message out.

Figure 60: Brand awareness by demographic profiles



Source: Brand SA: State of the Nation Report 2024

This year, for the first time, the national survey asked questions about the PYP programme to those who are aware of it. The results have been less than exciting as very few recalled the event, what it was about and who organised it.

Twenty-seven people (0.9%) of the sample attended a Play Your Part event. The maximum number of events that four people attended, was four. Those that attended gave a rating of 77% (very good). The events were received well. The events listed or described were not all Brand SA initiatives, indicating brand blur to distinguish Brand SA activities:

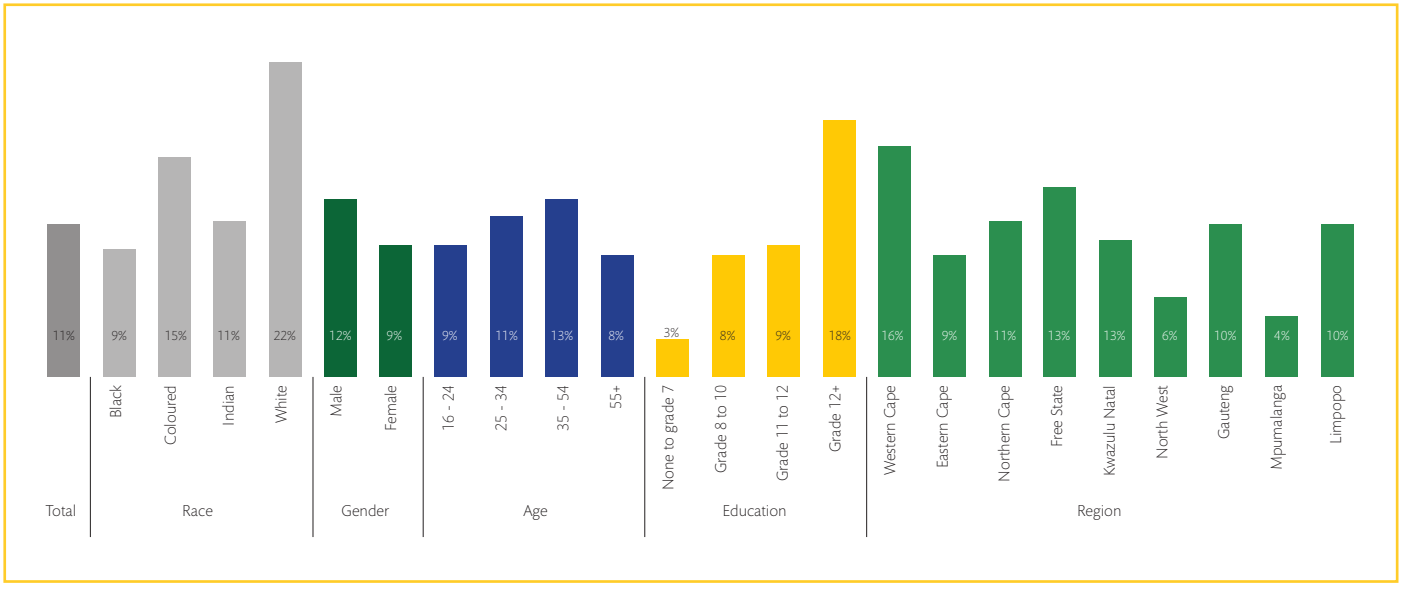
- A Brand SA event
- A marketing event
- Celebrated old citizens
- Giving back by giving kids sanitary napkins
- **It aims to lift the spirit of our nation by inspiring all South Africans to contribute to positive change, become involved and start doing. A nation of people who care deeply for one another and the environment in which they live, is good for everyone.**
- It was broadcast on TV, a big event
- It was moderate, overviewed experience
- **It's about encouraging each other to work together for a better South Africa**
- **It encourages us to create opportunities and platforms for global South Africans to connect and empower them with messages and information about key issues in our country**
- It was a big event; I heard about it again while listing to a radio in a taxi
- It was a protest event
- It was all about society, our society
- It was an initiative about breast cancer awareness
- It was at Phalaborwa stadium. That is as much as I remember
- **People taking position and use what they have or the talent they have**
- Senwabarwana

If all those who attended had feedback like the four comments in bold the events would be wonderful and recall would be fantastic.

It is recommended that the telephonic interview approach is followed with those that attended the events to better understand the quality of the event through that sample frame than through a nationally representative sample framework.

The constitutional awareness decreased from 25% two years ago to 18% last year and now at 11%. The last awareness stronghold is among the white population group and more educated. The aim of the campaign was to create the sense of freedom enshrined in the constitution to be who one wants to be as the right to practice economic, culture or religious activities protected by the constitution, irrespective of background, education or nationality.

Figure 61: Constitutional awareness by demographic profile



Source: Brand SA: State of the Nation Report 2024

The #InspiredByMyConstitution campaign with Imraan Christian was a great success and similar initiatives should be considered.

Moving on from brand awareness to a host of indices that express the situation and conditions at individual and household levels.

As a series of indices, the South African nation is vulnerable with 32% paying taxes that support 25% who are SASSA cardholders and 6% who have no source of income.

The ratio provides very limited room to manoeuvre state funds to meet the needs of the nation and ensure economic growth. As indicated, 20% (up from 4% last year) are willing to pay more taxes amidst the renewed and inspired hope to support the development and maintenance of the country under the leadership of the GNU.

The taxpayer dynamics will need to be managed in different and credible ways than just through law enforcement, particularly in reference to the new Social Cohesion fifth cluster that has developed. In international literature trends, there is a point at which taxpayers become less compliant as taxes increase.

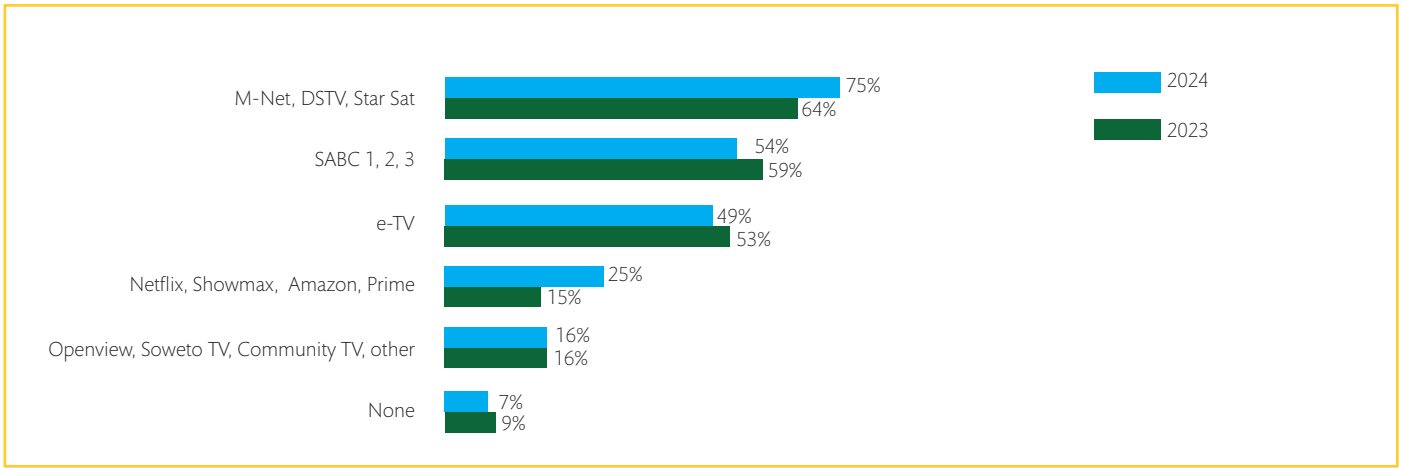
Table 11: Comparative trend in general individual and household circumstances

Internet Access	Electricity in Home	Education	Health Access
80% On any device	98% Permanent Connection	88% Public Schools	82% Public health system
Internet Access	**Electricity in Home**	**Education**	**Health Access**
6% Have no source of income	32% Currently pay	25% Card Holders	64% Very Good/ Good

Source: Brand SA: State of the Nation Report 2024

In terms of media platforms followed or engaged with, the paid for service, for the third year, switched to the number one position, above the open channel networks. In terms of social media platforms, WhatsApp and Facebook are the two main platforms used. WhatsApp, by implication is a closed network unless groups and other clusters are formed. Facebook on the other hand is an open and easier platform to share with a broader public. In a distant third is TikTok that passed YouTube two years ago. Please note that the "Twitter noise" or X, often referred to, is a small part of society and certainly does not represent national views with only 13% usage.

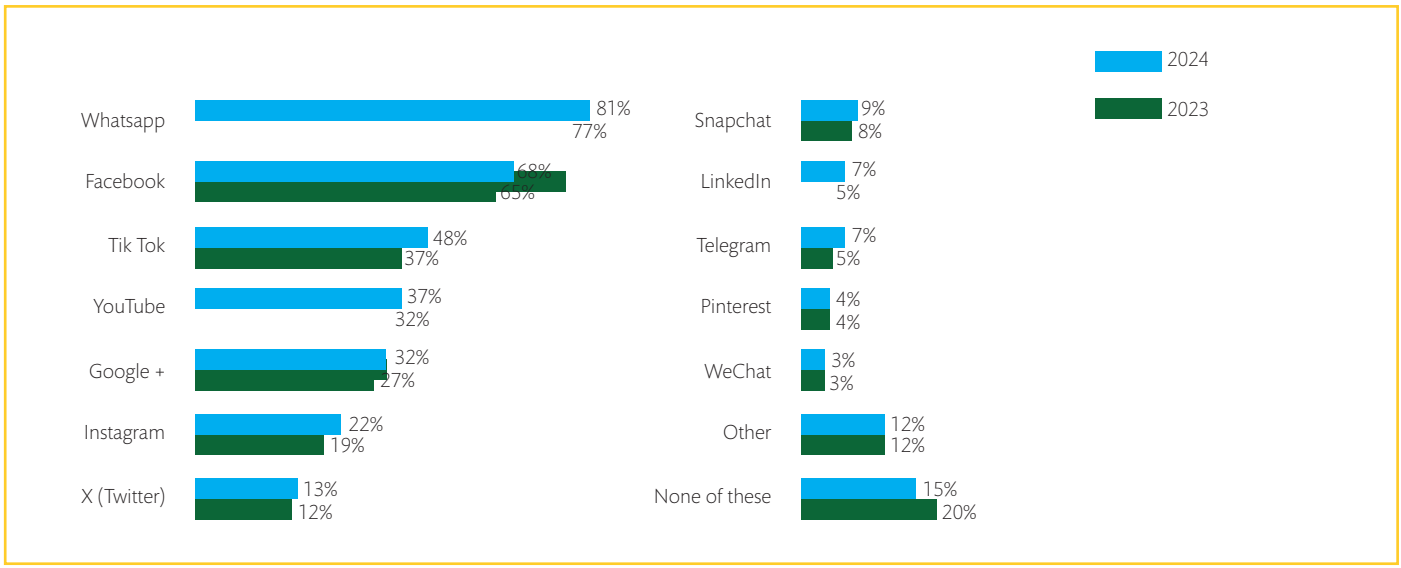
Figure 62: Comparative view of television and streaming services used



Source: Brand SA: State of the Nation Report 2024

Interesting to note the increase in usage across all media platforms. The ability to access these services through open Wi-Fi networks could be a driver of change and moving away from the open television channels.

Figure 63: Comparative view of social media platforms used

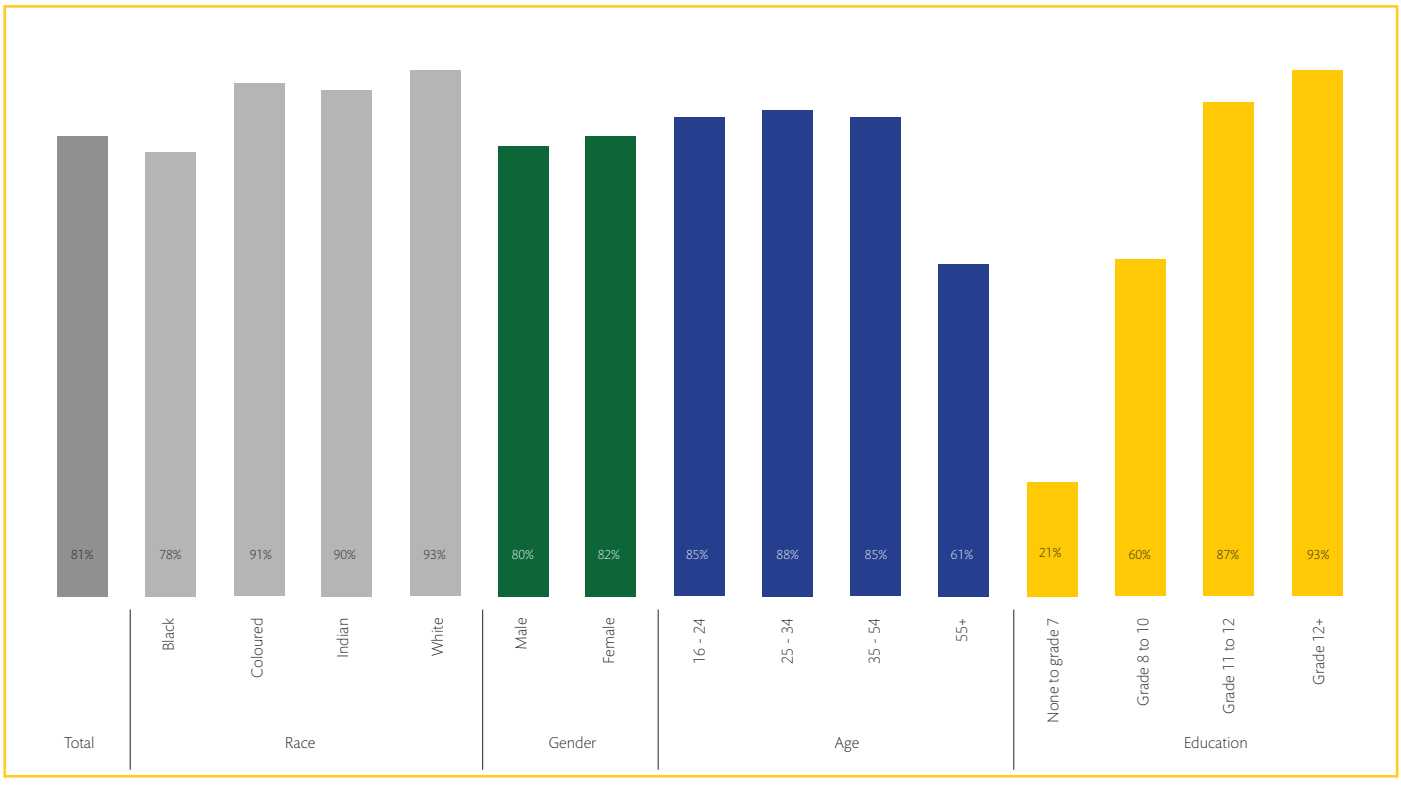


Source: Brand SA: State of the Nation Report 2024

Four television and social media platforms are compared based on their demographic profiles. The education level differences between the four brands confirm the PYP predicament mentioned earlier.

WhatsApp, and especially WhatsApp groups have grown into common business platforms to communicate easily and effectively with a target audience. Community forums could be channelled together to offer mutual support or news events that may inspire further development. WhatsApp and TikTok are often used in conjunction. It could be possible to set the WhatsApp group to only be an outward communication platform, in other words people can receive information through the platform but cannot engage in conversation. WhatsApp has a similar profile to Facebook, the owner of WhatsApp.

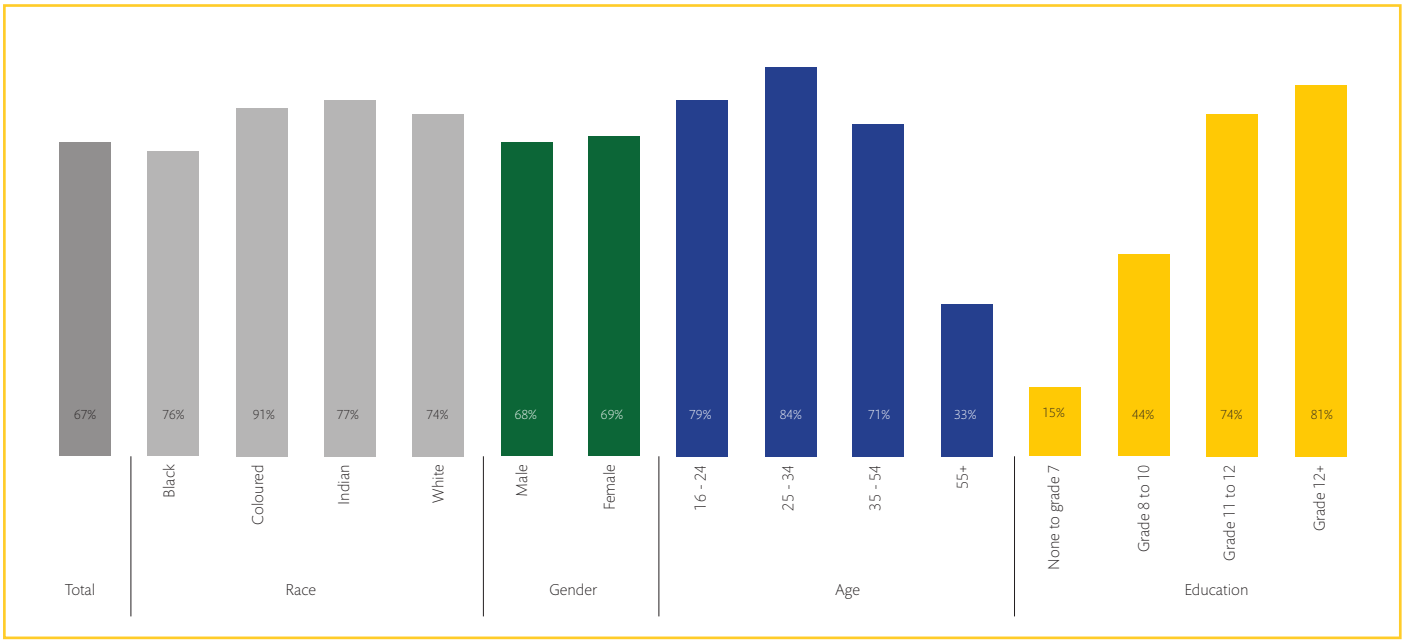
Figure 64: WhatsApp demographic profile



Source: Brand SA: State of the Nation Report 2024

In terms of Facebook, a much higher penetration profile than any of the other social media solutions, such as Instagram, X (Twitter), and the like, although TikTok and YouTube are catching up fast. From Facebook, one could develop YouTube videos and other engagement platforms to show greater detail of the discussion points to be communicated. The higher youth penetration makes Facebook the ideal platform to influence national brand strategies for future development initiatives. The fact that the less educated South Africans do not use Facebook emphasises the use of radio or TV as platforms

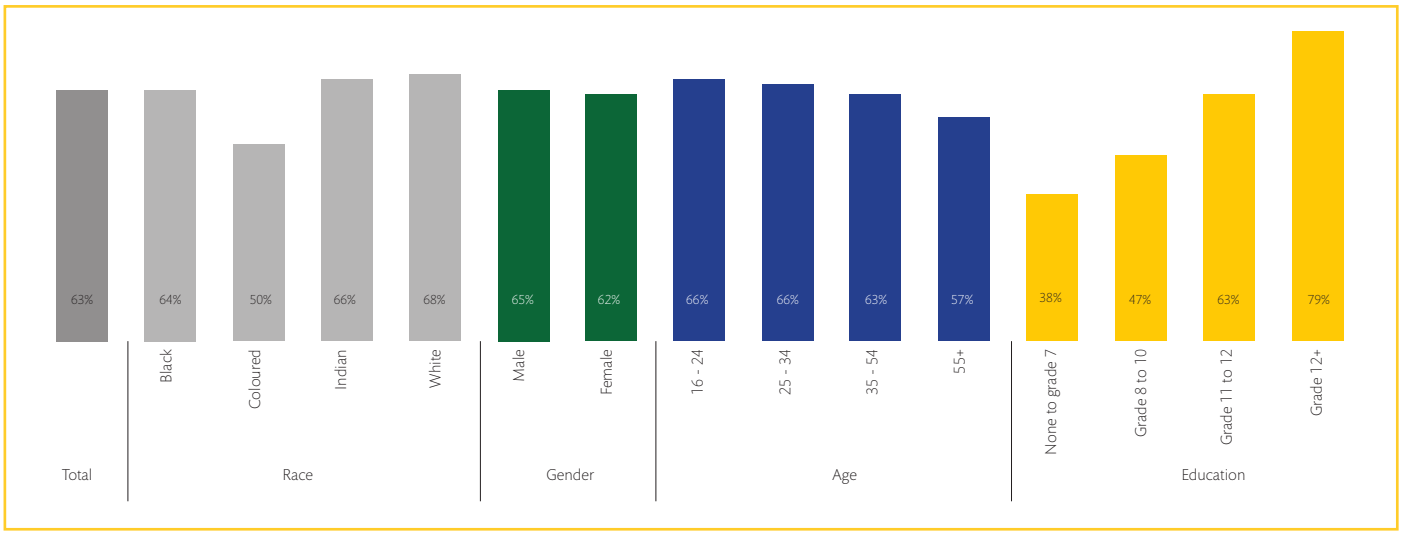
Figure 65: Facebook demographic profile



Source: Brand SA: State of the Nation Report 2024

In third place, increasing from 56% in 2022 to 64% last year, and 63% this year. The M-Net/DSTV profile remains the same, with a growing market penetration across all race groups, but still with a skew towards those with higher education levels. Very little distinction between regions. Since this platform is household-based, not individual-based, there is little variance among age and gender groups.

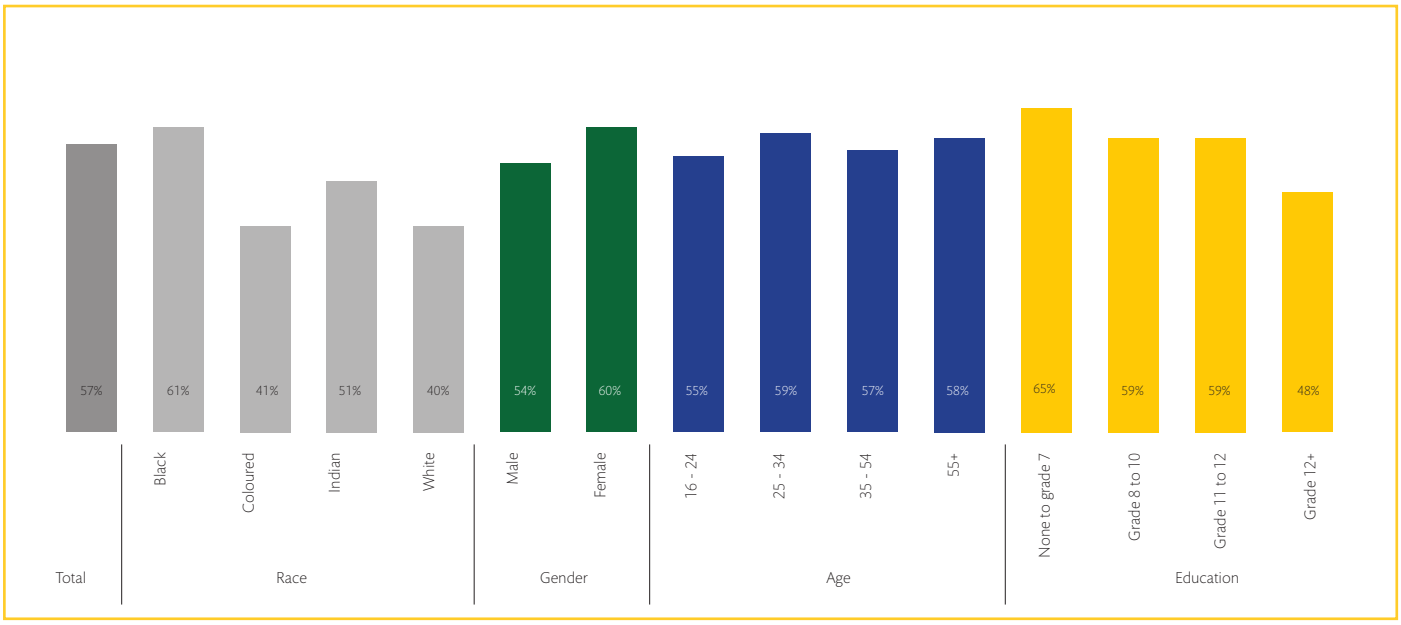
Figure 66: M-Net/DSTV demographic profile



Source: Brand SA: State of the Nation Report 2024

The demographic profile of those following the three open SABC channels is mainly noted in the education distribution, almost the opposite pattern of the M-Net/DSTV pattern. Other demographic indicators are evenly spread with marginal differences. The e-TV profile looks very similar and alludes to the shared switching between the four open channels. Although these channels are included in the M-Net/DSTV packages, it is very likely that they are watched less often than the other channels offered through the digital networks.

Figure 67: Open channel SABC 1 2 3 and E-TV demographic profile



Source: Brand SA: State of the Nation Report 2024

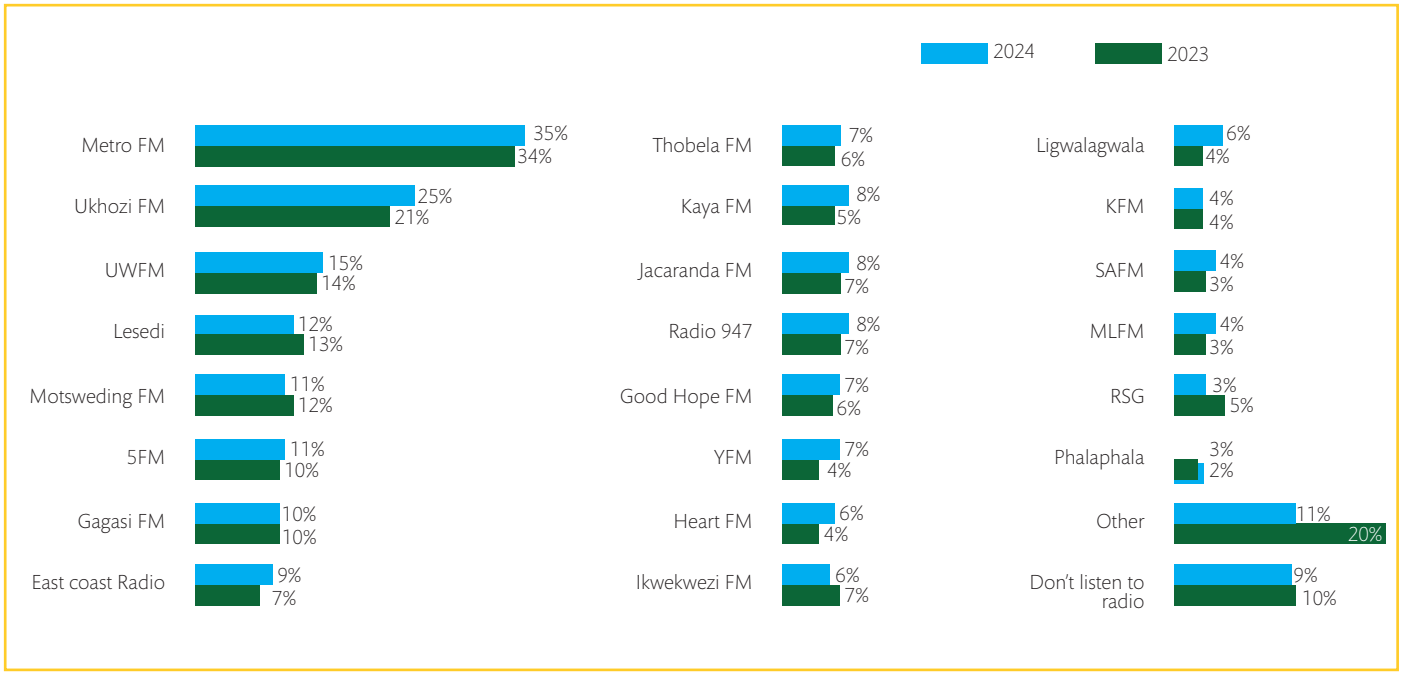
In this national survey, more than 80 radio stations were identified. The major radio stations are listed with comparative indicators to last year.

The list provide insight into the dynamics of the radio market in South Africa, a complex and highly competitive space to communicate through.

Brand SA's communication strategy could utilise the radio network effectively to reach national, provincial, or local communities to support initiatives in the various regions.

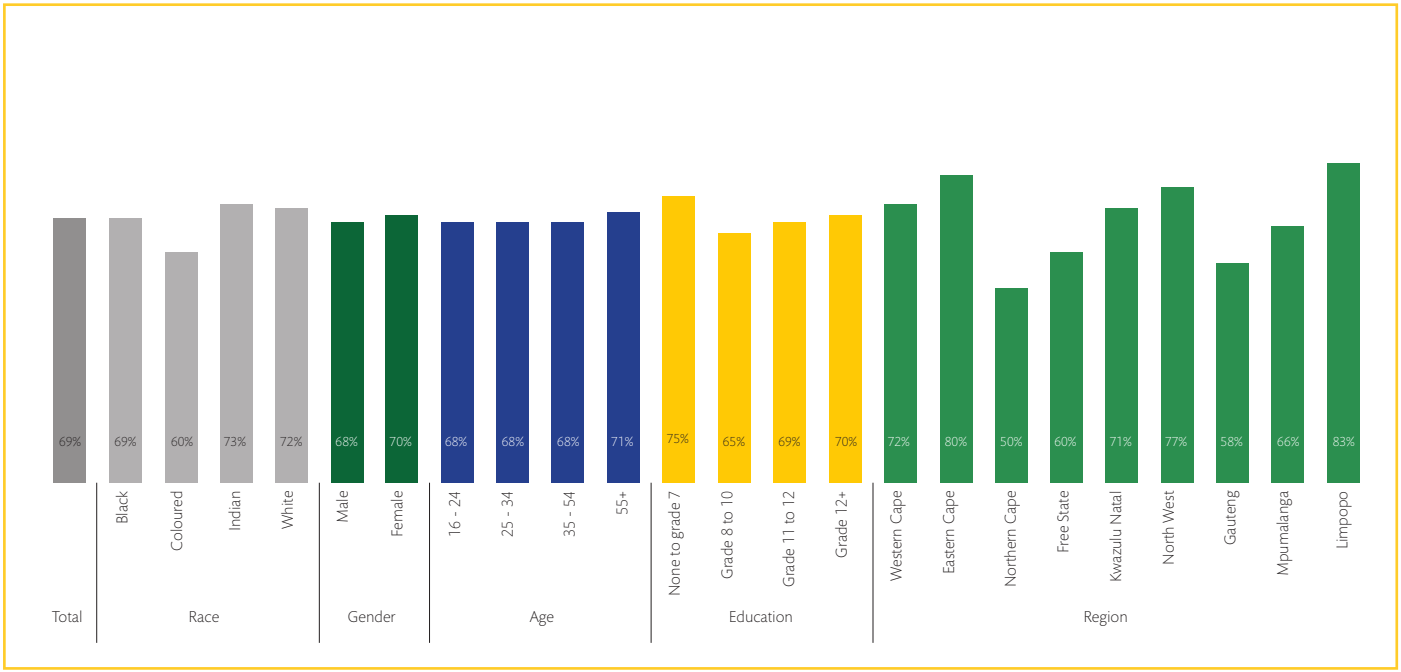
As seen, the television networks of SABC, e-TV, and DSTV (collective packages and products) are the visual communication stream that could complement the wide range of audio solutions available in South Africa.

Figure 68: The Past two years' major radio stations in South Africa



Source: Brand SA: State of the Nation Report 2024

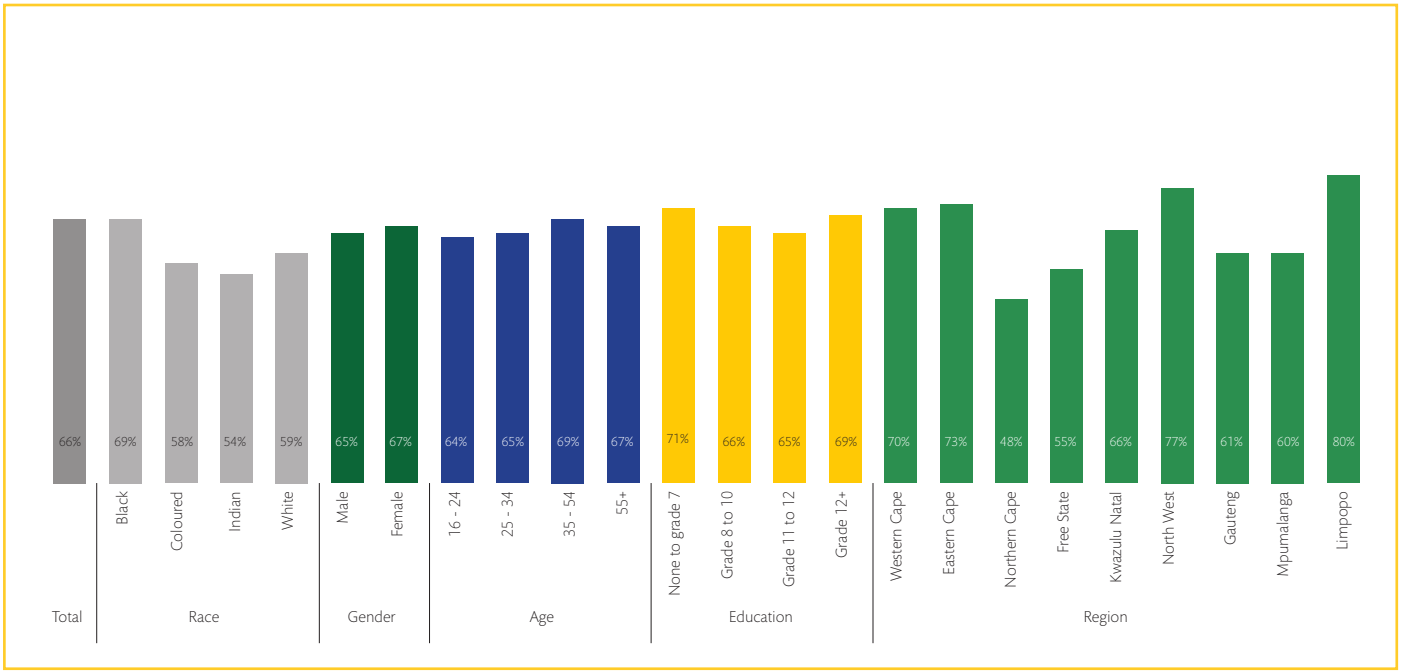
Figure 69: Identity cluster: Physical features, demographic profile



Source: Brand SA: State of the Nation Report 2024

The South African profile moved from 75% in 2019 to 74% in 2020, 68% in 2021, 66% in 2022, and 62% in 2023. The collective association with being South African strengthened in 2024 back to 2022 levels. Despite crime, corruption, and unemployment being strong factors that negatively influence a sense of identity, there is renewed hope after the 2024 elections and the establishment of the GNU.

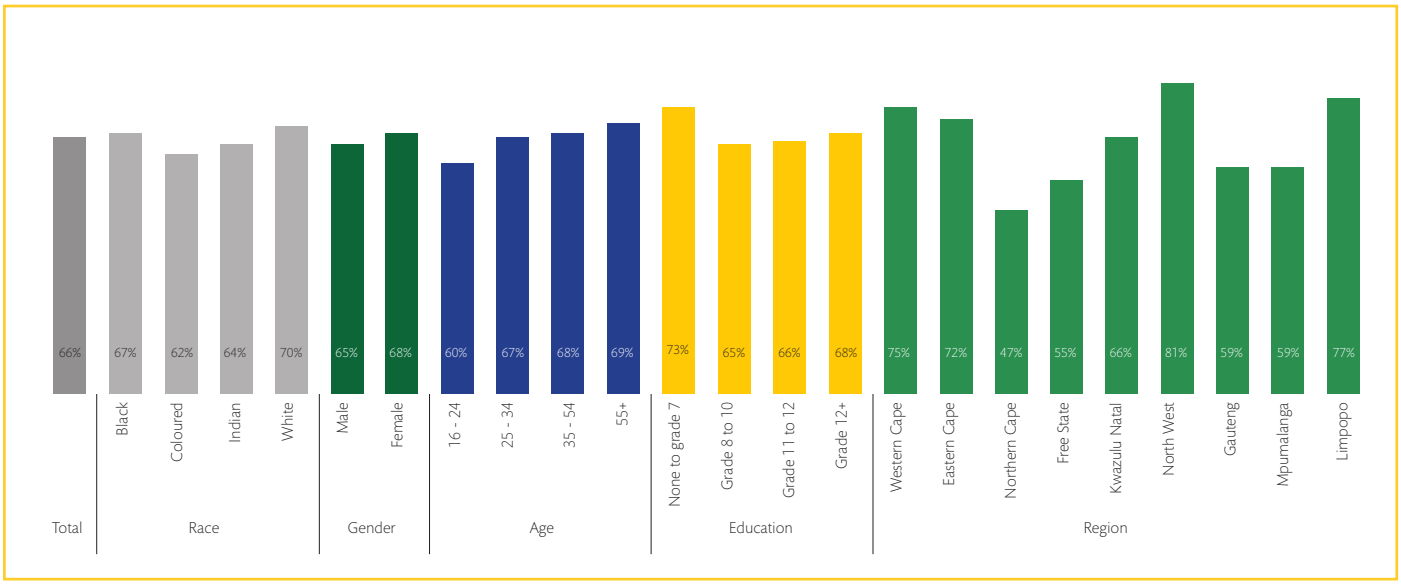
Figure 70: Identity cluster: South African demographic profile



Source: Brand SA: State of the Nation Report 2024

The identity cluster loving and caring was at 81% in 2020. The profile remains very stable with the youth slightly below the other age groups. It is therefore not a change in the loving identity, but rather a change in the physical feature identity profile that pushed this one into third place.

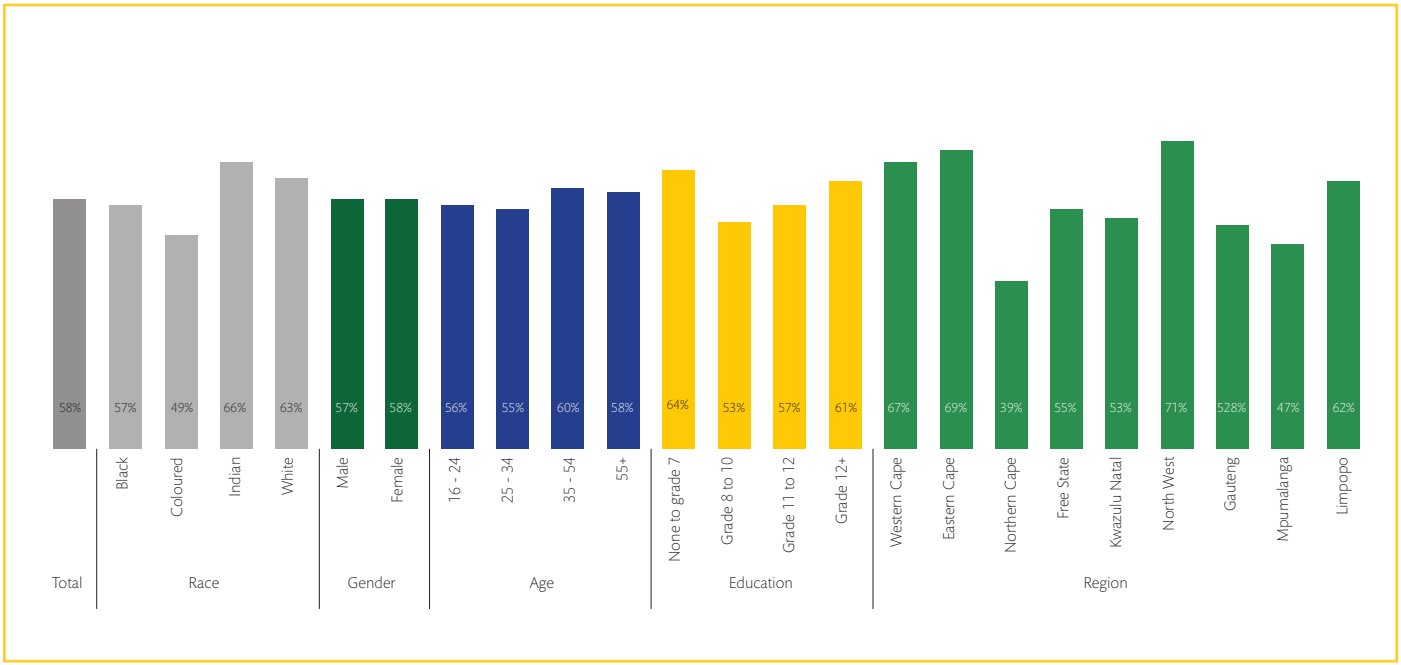
Figure 71: Identity cluster: Loving and caring demographic profile



Source: Brand SA: State of the Nation Report 2024

The freedom profile slipped from 60% to 54%, almost back at levels seen in 2021. The freedom cluster increased slightly in 2024 to 58%. In 2020, during COVID-19 restrictions, the importance of freedom increased to 72%, illustrating how the association with the identity clusters changes in relation to circumstances, particularly lockdown measures. Compare that with the 63% score seen in 2018. The slight increase seen this year relates to the elections, which afforded the nation the opportunity to state their claim on what is going on in the country.

Figure 72: Identity cluster: Freedom demographic profile

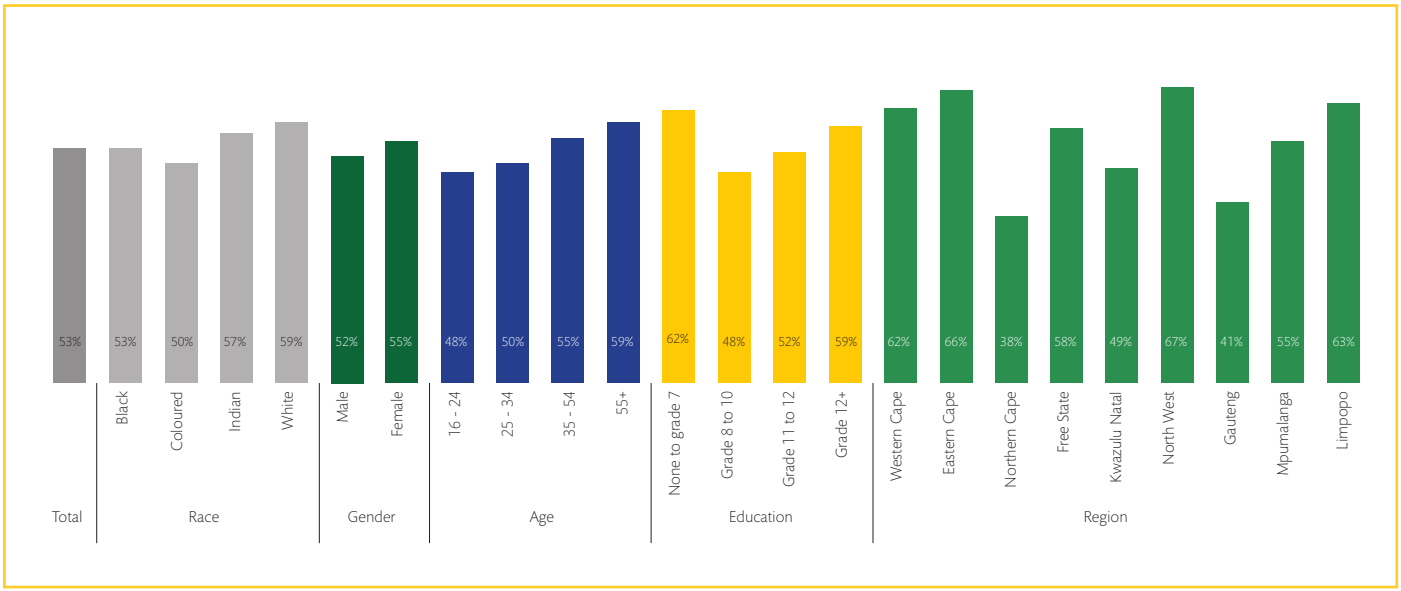


Source: Brand SA: State of the Nation Report 2024

In terms of the role and function cluster, the most important role or function attribute is being a parent. The balance, community life, work, and where one lives are less important role-defining attributes than family. This is supported by focus group analysis in 2023, where most indicated they continue doing what they are doing to support their families and particularly their children.

This accentuates the identity attribute of the nation, starting with the family as the most important social construct, where the role of the individual has the greatest impact. Of course, not everyone is parent, but it also supports the notion that social circles have become smaller. Being a loving and caring person could mean more in broader social circles than being a parent, which is very specific to the family, even though it is a loving and caring role as well.

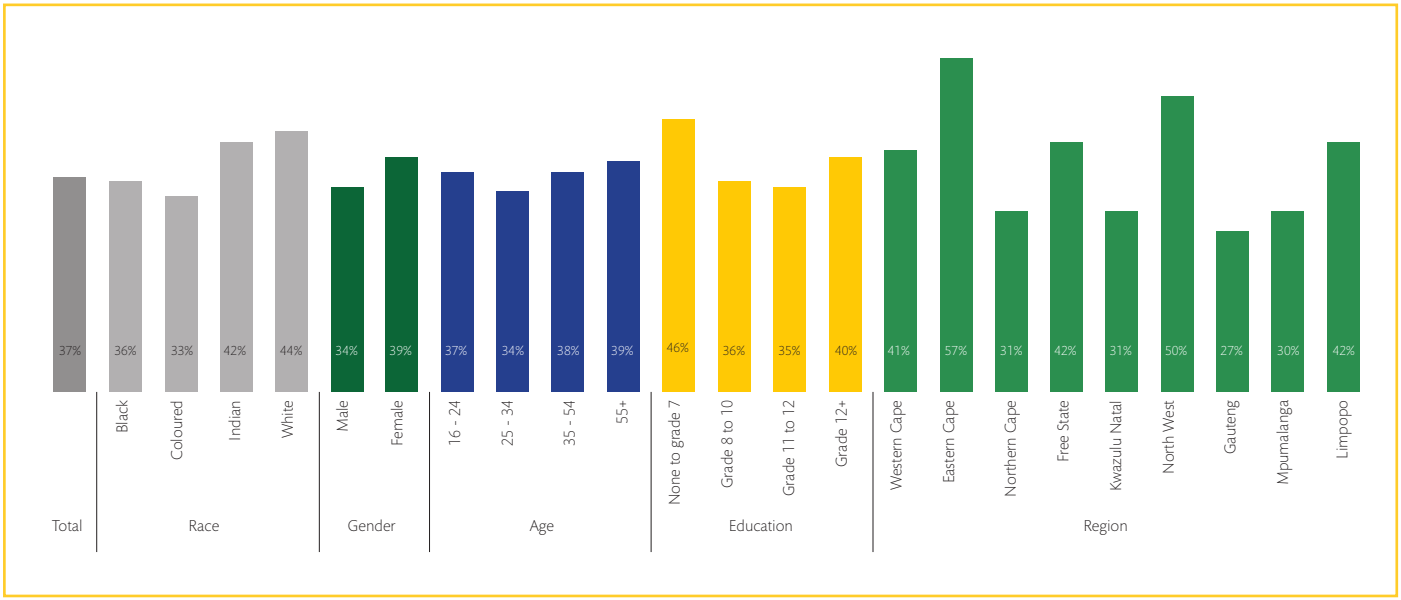
Figure 73: Identity cluster: Role and function demographic profile



Source: Brand SA: State of the Nation Report 2024

The South African profile moved from 75% in 2019 to 74% in 2020, 68% in 2021, 66% in 2022, and 62% in 2023. The collective association with being South African strengthened in 2024 back to 2022 levels. Despite crime, corruption, and unemployment being strong factors that negatively influence a sense of identity, there is renewed hope after the 2024 elections and the establishment of the GNU.

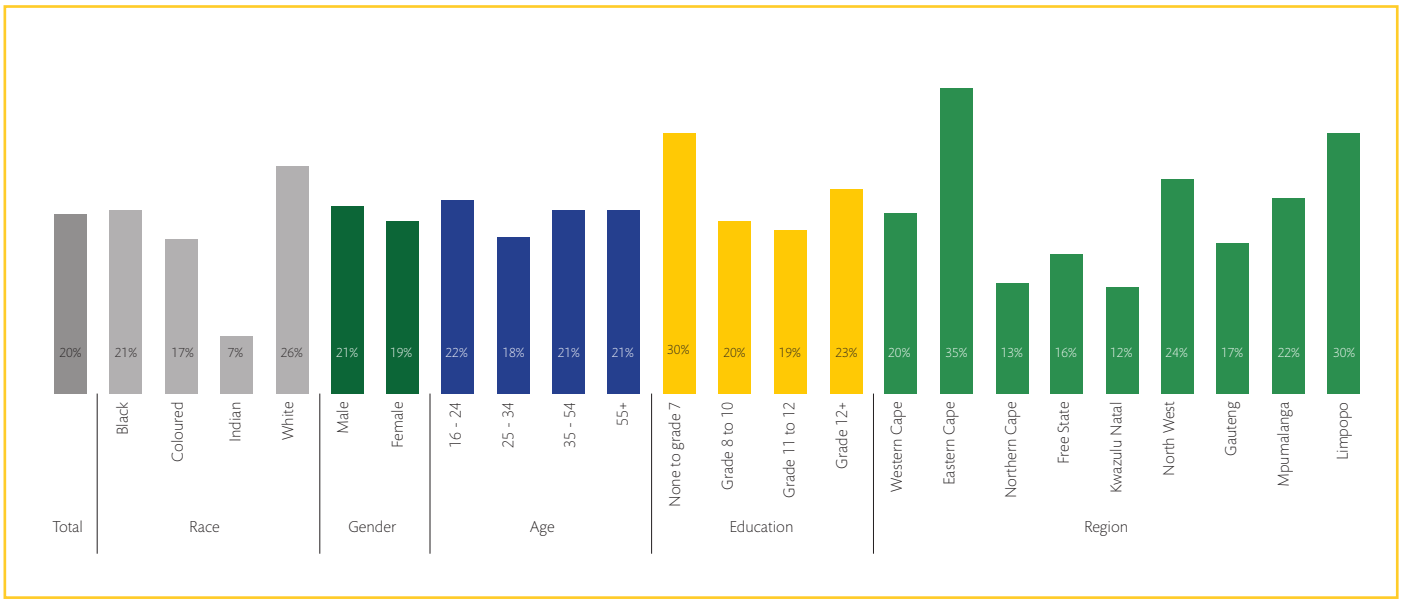
Figure 74: Identity cluster: Beliefs, demographic profile



Source: Brand SA: State of the Nation Report 2024

In line with the broader trend, the 2019, the politics cluster score was 21%, 22% in 2020 before decreasing to 17% and 16% between 2021 and 2023. This year, 2024, the score increases to 20% and for the first time there is a substantial interest in the political identity from White South Africans.

Figure 75: Identity cluster: Political demographic profile

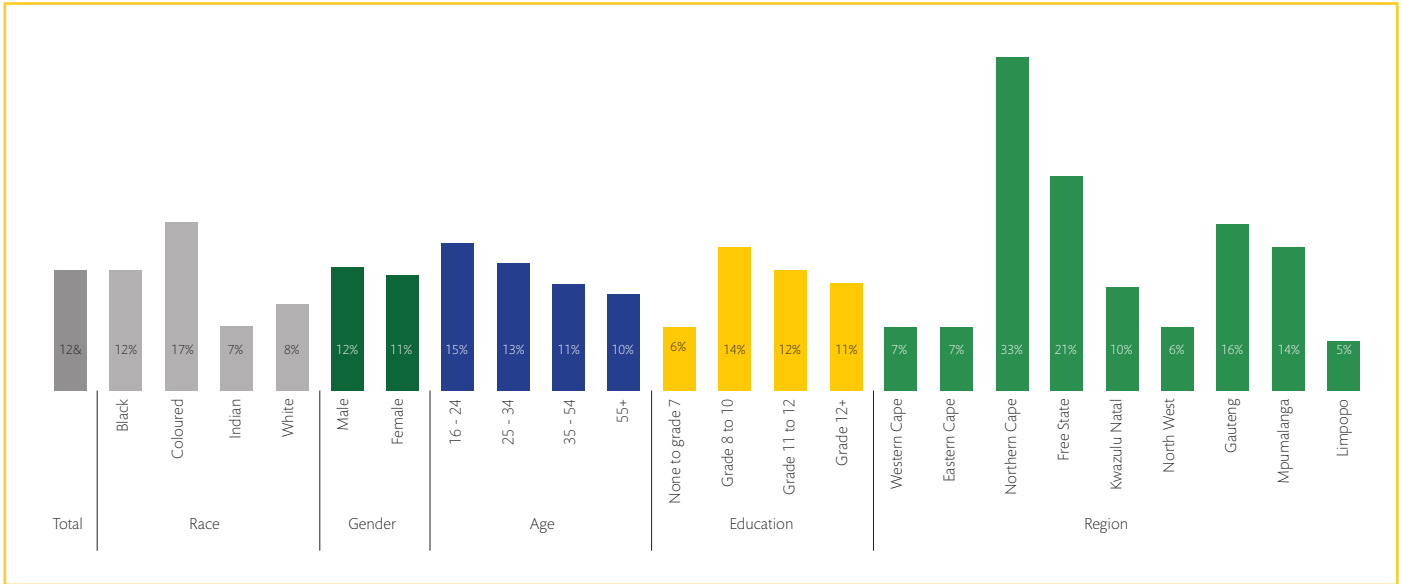


Source: Brand SA: State of the Nation Report 2024

Please note the data collected for this report was in November 2024, it is possible that the sentiments may have changed since the Bela act, Land Expropriation act as well as the Executive Order from President Trump. It will be important to monitor this going forward. Please note that there is a likely correlation between the less educated group and the race group profile.

Lastly, a critical aspect to monitor is those that do not associate with any identity cluster. With the broader re-defining trend seen across all indicators in this section of the report, it is not surprising that the "None" or no identity attribute association group increased from 4% to 10% to 12% to 15% and back to 12% this year. In 2023, the nanocluster was the highest at 15%. Again, accentuating the point that when people are under pressure, they withdraw not just socially but also personally. The important demographic group to note is age and race patterns. The provincial distribution is quite erratic, so please treat this with caution.

Figure 76: Identity cluster: None demographic profile



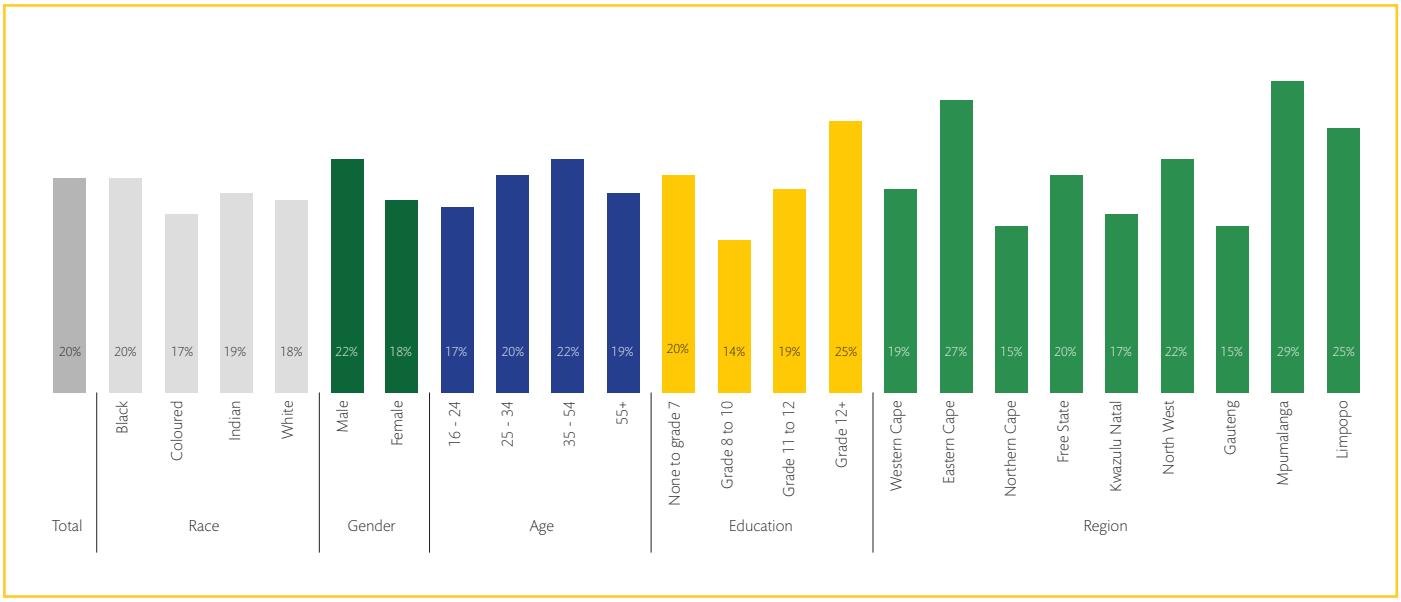
Source: Brand SA: State of the Nation Report 2024

This concludes the identity chapter, the next few chapters are about the three main constructs, the behavioural group segments as expressions of the identity of the nation in thoughts, actions and behaviour.

Annexure 2: Social Cohesion Clusters by Province, Age, and Demographic Profile
Social Cohesion Cluster 1: Strong reliance on government systems and processes – vertical cohesion

The provincial distribution of Social Cohesion Cluster 1, which is defined by a strong reliance on government systems and institutional processes for order and support, offers important insight into how vertical cohesion is experienced across the country.

Figure 77: Social Cohesion cluster 1: Strong reliance on government systems and processes (vertical cohesion)



Source: Brand SA: State of the Nation Report 2024

Social Cohesion Cluster 1 by Province

Mpumalanga shows the highest alignment with this cluster at 29 %, followed closely by the Eastern Cape (27 %) and Limpopo (25 %). These provinces are characterised by a strong orientation toward developmental support and a continued reliance on public services for education, healthcare, infrastructure, and welfare. In such contexts, vertical cohesion emerges as a stabilising force, shaped by the visibility and perceived necessity of government systems in daily life.

Northwest (22 %) and the Free State (20 %) also display notable association with this cluster. These mid-range figures may reflect partial institutional dependence, where government structures remain relevant but are supplemented by community networks or private alternatives, depending on accessibility and regional economic conditions.

In contrast, KwaZulu-Natal (17 %) and the Western Cape (19 %) show lower alignment. While these provinces have varying levels of service delivery performance, the presence of more robust private alternatives, urbanisation, and socio-political dynamics may influence lower reliance on government-led cohesion.

Gauteng, despite being the economic hub of the country, registers only 15 %, the lowest alongside the Northern Cape (15 %). In Gauteng, this may be due to greater exposure to private sector services, higher public expectations, and broader access to institutional alternatives – all of which dilute dependence on public systems. In the Northern Cape, however, the low level of alignment likely stems from geographic dispersion, limited-service coverage, and infrastructural gaps that reduce the presence and perceived reliability of government institutions. The vast rural landscape and small population base make consistent state engagement challenging, contributing to a sense of institutional distance.

From a Nation Brand perspective, these provincial dynamics highlight a critical insight: vertical social cohesion flourishes where state presence is both visible and dependable. Where that presence is inconsistent, cohesion becomes more fragile, and trust must be rebuilt through targeted, context-specific public service delivery. Strengthening institutional legitimacy and ensuring equitable access across all provinces is not only essential to deepening social cohesion, but also to reinforcing South Africa's identity as an inclusive, responsive, and development-oriented state.

Social Cohesion Cluster 1 by Age, and Demographic Profile

The demographic profile of Social Cohesion Cluster 1 reveals important distinctions in how reliance on institutional systems manifests across age, race, gender, and education. These insights provide valuable context in understanding how different groups anchor their sense of order and national cohesion through public structures.

By age, the highest alignment is found among those aged 35 to 54 years (22%), suggesting that economically active adults often responsible for families and navigating public institutions for health, education, and security are more inclined to value reliable systems as a foundation for societal order. This is followed by 25 to 34-year-olds (20%) and those 55 and older (19%), indicating continued trust in public structures among both emerging and older adult groups. The lowest alignment is among youth aged 16 to 24 (17%), which may reflect limited direct engagement with state systems or shifting expectations influenced by digital access, social networks, or private sector alternatives.

Racial dynamics are relatively consistent across groups. Black respondents (20%) show the strongest association, pointing to continued structural reliance on public services for essential needs. Indian (19 %) and White (18 %) respondents follow closely, while Coloured respondents (17 %) reflect the lowest level of identification. These differences are marginal but may reflect variation in lived experiences of institutional access and perceptions of state responsiveness.

Gender reveals a slightly more pronounced pattern where male respondents (22%) are more likely to identify with this cluster compared to female respondents (18 %).

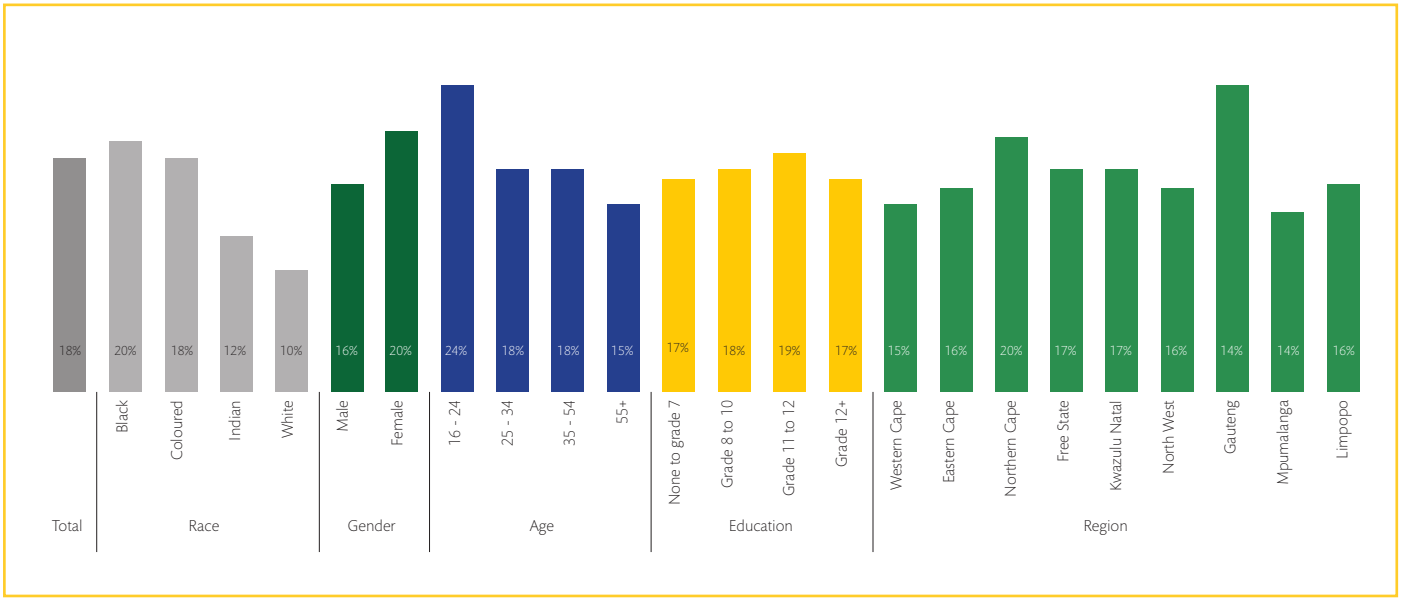
This may be attributed to differing levels of engagement with government systems, with men potentially interacting more with formal economic structures, while women particularly in vulnerable contexts may be more reliant on informal support networks.

Education levels emerge as a key differentiator. The strongest alignment is found among those with post-matric education (25%), suggesting that higher educational attainment may correlate with greater expectations of structured governance and belief in the value of institutional order. Those with Grade 11–12 (19%) and up to Grade 7 (20%) also show moderate alignment, while the lowest representation is among respondents with Grade 8–10 (14%). This indicates a potential gap in institutional trust or engagement during a transitional educational phase where respondents may be less connected to structured pathways.

Together, this demographic portrait of Cluster 1 reinforces that institutional trust and by extension, vertical social cohesion is shaped by exposure, responsibility, and lived experience. For the Nation Brand, these findings affirm the importance of maintaining visible, inclusive, and responsive public systems that foster confidence across all demographics not only as a mechanism of governance, but as a foundation for national unity and shared progress.

Social Cohesion Cluster 2, which reflects belief in equal access and fairness, is often underpinned by mechanisms such as trade unions and social protections. This cluster aligns with ideals of inclusivity and mutual accountability, positioning fairness as a key pillar of cohesion.

Figure 78: Social Cohesion cluster 2: Equal access and opportunity for all



Source: Brand SA: State of the Nation Report 2024

Social Cohesion Cluster 2 by Province

The highest alignment with Cluster 2 is observed in Gauteng (24%), indicating a strong belief in mechanisms that promote equal access and fairness in the country's most populous and economically active province. The prominence of this cluster in Gauteng likely reflects both greater exposure to structured labour systems and stronger expectations for institutional equity, given the province's deep socio-economic diversity.

Northern Cape (20%) also shows elevated support, which may be rooted in perceptions of economic vulnerability and the need for collective safeguards. In the Free State, KwaZulu-Natal, and Limpopo (each at 17%), the cluster maintains stable representation, suggesting steady support for fairness-based social cohesion, possibly influenced by developmental reliance and historical labour organising.

Moderate representation is seen in the Eastern Cape and North-West (both at 16%), likely reflecting long-standing experiences of inequality and underdevelopment, which heighten awareness of the need for mechanisms that promote fairness and equal access. In these contexts, support for structures such as unions or state protections may stem from a desire to address systemic exclusion. Meanwhile, the Western Cape (15%) and Mpumalanga (14%) reflect

lower alignment with this cluster, though for different reasons. In the Western Cape, this may point to more individualized or market-driven approaches to opportunity and social advancement. In Mpumalanga, a largely rural province, the lower score may reflect disillusionment with the effectiveness of formal equity mechanisms, or limited access to institutional protections indicating a disconnect between the ideal of fairness and the lived experience of structural support.

Social Cohesion Cluster 2 by Age, and Demographic Profile

By race, Black respondents (20%) show the highest association with Cluster 2, reinforcing the importance of equal access in communities where structural inequalities remain most visible. Coloured respondents (18%) follow closely, while Indian (12%) and White respondents (10%) reflect lower levels of alignment, suggesting varying degrees of perceived need for fairness-enforcing mechanisms.

Gender reveals an important distinction: female respondents (20%) are more aligned with this cluster than males (16%), potentially reflecting women's higher exposure to systemic barriers and their support for policies that promote inclusivity and equity.

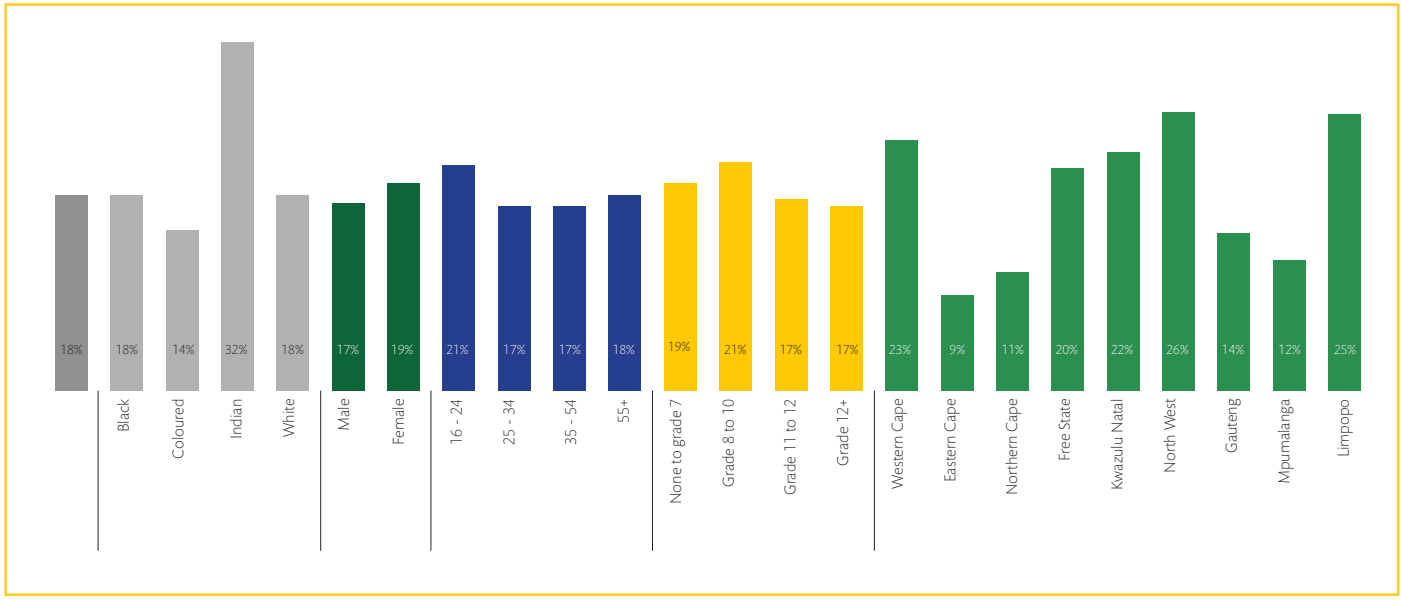
By age, the strongest alignment is among youth aged 16–24 (24%), suggesting that younger South Africans are particularly invested in fairness and equal opportunity as pillars of national cohesion. Support declines slightly among 25–34 and 35–54-year-olds (both at 18%), and is lowest among those 55 and older (15%) possibly reflecting generational differences in how fairness and access are experienced or prioritised.

Educational attainment is fairly even across levels: Grade 11–12 (19%) shows the highest association, while Grade 8–10 (18%), Grade 0–7 (17%), and Grade 12+ (17%) remain close behind. This suggests that belief in fairness-based cohesion is broadly shared across education levels, with slight increases among those who have completed secondary education but may not yet have benefited from higher education or formal employment pathways.

Social Cohesion cluster 3: Connecting with fellow South Africans (horizontal)

This cluster, the third, is at the heart of connecting with people. The demographic and provincial profile of Social Cohesion Cluster 3 is defined by connection and solidarity between citizens rather than reliance on formal government systems, which reflects a strong and emotionally grounded form of cohesion. Although harder to cultivate, this form of social cohesion is critical for a resilient and unified society.

Figure 79: Social Cohesion cluster 3: Connecting with fellow South Africans (horizontal)



Source: Brand SA: State of the Nation Report 2024

Social Cohesion Cluster 3 by Province

The provincial distribution of Social Cohesion Cluster 3 reveals significant regional variation in how citizens experience and prioritise interpersonal connection over institutional reliance. This cluster is considered one of the most emotionally sophisticated forms of cohesion, as it reflects trust, empathy, and solidarity among people themselves often emerging in spaces where social bonds are strong, even in the absence of formal support.

North-West (26%) shows the highest alignment with this cluster, indicating a strong culture of interpersonal trust and community interconnectedness. This may be influenced by rural settlement patterns, cultural cohesion, and longstanding community structures that promote mutual support. Similarly, Limpopo (25%) also registers high identification, likely shaped by strong family networks, traditional community roles, and cultural emphasis on unity and collective responsibility.

In the Western Cape (23%), elevated alignment with horizontal cohesion may reflect dense community ties, particularly in areas where institutional support may feel uneven or where people have historically depended on each other to navigate social or economic pressures. While the Western Cape often reflects more individualised social models, this data suggests that many residents continue to derive strength from people-to-people connection, especially in marginalised or localised communities.

KwaZulu-Natal (22%) and the Free State (20%) also score above the national average, possibly reflecting the value placed on social relationships within closely-knit communities. In KwaZulu-Natal, the influence of communal living, cultural preservation, and extended family structures may drive this pattern. In the Free State, where economic volatility has deepened social dependency, residents may increasingly rely on one another for emotional and practical support. By contrast, Gauteng (14%) presents a significantly lower alignment with this form of cohesion. As the country's economic powerhouse and most urbanised province, Gauteng's population is often more transient, diverse, and individualised factors that can dilute the strength of social bonds and reduce opportunities for deep interpersonal connection. High mobility, economic pressure, and fragmented community spaces may account for the limited identification with horizontal cohesion in this context.

Mpumalanga (12%), Northern Cape (11%), and the Eastern Cape (9%) register the lowest alignment with Cluster 3. In Mpumalanga and the Northern Cape, geographic dispersion, low population density, and limited infrastructure may inhibit the development of strong social networks beyond immediate families. In the Eastern Cape, economic hardship and ongoing service delivery challenges may be limiting the emotional bandwidth for building trust beyond one's immediate circle. Rather than indicating a rejection of interpersonal unity, these scores may reflect environments where survival takes precedence over social engagement, and where communities have become inward-looking as a coping mechanism.

These provincial dynamics show that while horizontal cohesion is deeply valued in parts of the country, it is not evenly distributed. For the Nation Brand, this underlines the need to promote shared identity and social trust at grassroots level especially in urbanised and underserved regions while celebrating those provinces where every day solidarity continues to define the social landscape.

Social Cohesion Cluster 3 by Age, and Demographic Profile

The age distribution of Cluster 3 offers valuable insight into how interpersonal connection is experienced across life stages. Notably, youth aged 16–24 (21%) show the highest identification with this cluster, reflecting a generation that values empathy, peer connection, and social interaction as key components of national unity. This may also point to youth-led social movements and digital community-building, which foster new forms of horizontal engagement outside traditional structures. However, there is a marked drop among 25–34 and 35–54 year olds (both at 17%), who may be more burdened by economic pressures, limited time, or a more individualised, self-reliant approach to survival and opportunity. This dip suggests that the transition into economic adulthood may temporarily shift focus away from collective connection toward navigating institutional and financial constraints. Among those 55 and older (18%), alignment increases again, potentially indicating a return to communal values later in life or a stronger sense of legacy, cultural preservation, and moral leadership through social connection.

The racial profile of this cluster presents a unique pattern. Indian respondents (32%) show the strongest alignment significantly above all other groups. This may be attributed to tight-knit community structures, high levels of social cohesion within cultural and familial networks, and sustained reliance on mutual support within extended kinship and religious frameworks. Black and White respondents are equally represented at 18%, reflecting a balanced but moderate sense of horizontal connection, possibly shaped by differing historical experiences of social fragmentation or community resilience. Coloured respondents (14%) show the lowest alignment, which could be linked to socio-spatial fragmentation in provinces like the Western Cape and Northern Cape, as well as a perceived sense of social exclusion or marginalisation in broader nation-building narratives.

Gender differences are relatively narrow, with female respondents (19%) slightly more aligned than males (17%). This subtle distinction may reflect women's greater role in caregiving, community involvement, and social bridging within families and neighbourhoods. Women often serve as the emotional and relational anchors of communities a role that naturally aligns with the values of this cluster, including empathy, trust, and mutual recognition.

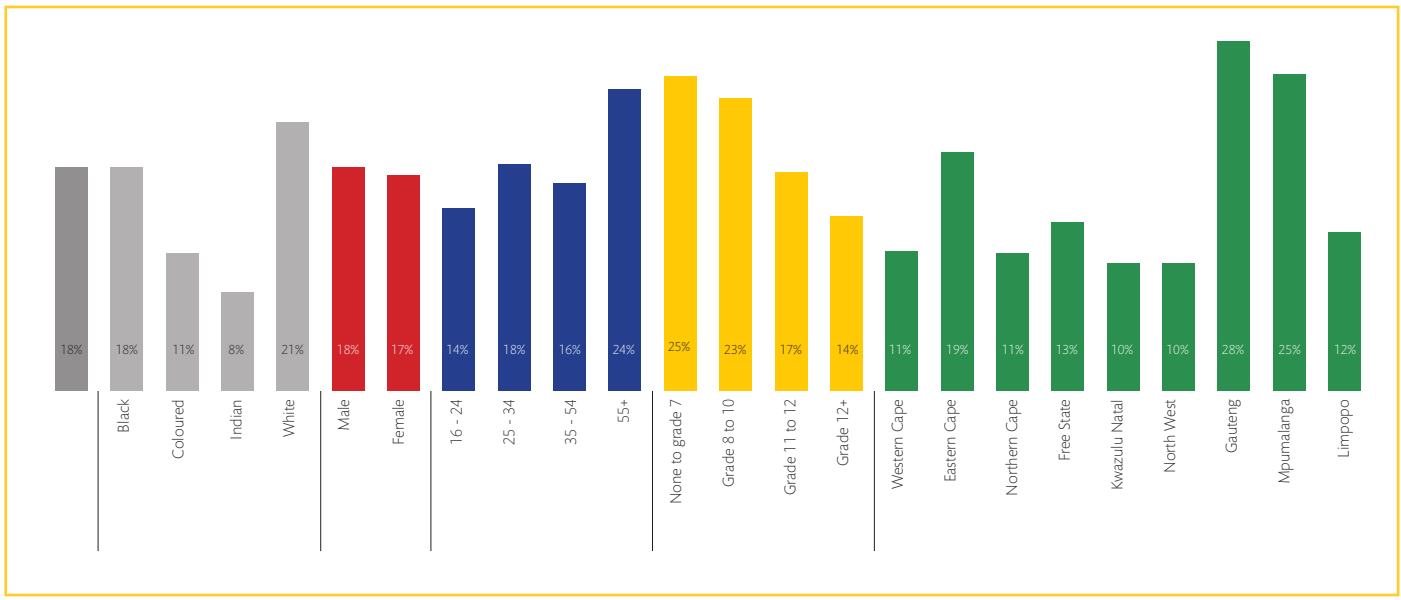
The education profile of Cluster 3 is also revealing. Respondents with Grade 8–10 (21%) and 0–Grade 7 (19%) show the highest levels of alignment, indicating that those with lower or intermediate levels of formal education may rely more on interpersonal networks to navigate life's challenges. These groups often operate in environments where social capital is essential for survival, support, and opportunity. Conversely, those with Grade 11–12 and Grade 12+ (both at 17%) reflect slightly lower identification, which may point to a shift in emphasis from relational cohesion to institutional or individual advancement as education levels increase. However, this does not imply a lack of social values rather, it may reflect that social connection becomes less of a survival tool and more of a value-add in contexts where other forms of capital are accessible.

The demographic dynamics of Cluster 3 suggest that horizontal cohesion is deeply shaped by socio-economic positioning, age-related life phases, and cultural identity. It is strongest among the young, among those with fewer institutional buffers, and within communities where collective survival has long been a necessity. For the Nation Brand, these insights affirm the importance of cultivating trust, empathy, and shared identity at the people-to-people level — not only through policy, but by enabling community platforms, intergenerational dialogue, and cultural expression that reinforce the emotional infrastructure of the nation.

Social Cohesion cluster 4: Inequality, high unemployment and homelessness are concerns

The fourth cluster reflects a broad, empathetic outlook – one that prioritises concern for the conditions and wellbeing of others, even in the absence of direct personal connection. Unlike horizontal cohesion, which is based on peer relationships and mutual support, this cluster is characterised by a strong awareness of social inequality and the lived experiences of vulnerable groups. Central to this perspective is a concern for poverty, homelessness, and the disproportionate burden carried by low-income households, where limited resources must meet multiple needs. Within this context, support for interventions such as the minimum wage is common, as they are viewed as essential tools to protect dignity and basic livelihood.

Figure 80: Social Cohesion cluster 4: Inequality, high unemployment, and homelessness are concerns



Source: Brand SA: State of the Nation Report 2024

Social Cohesion Cluster 4 by Province

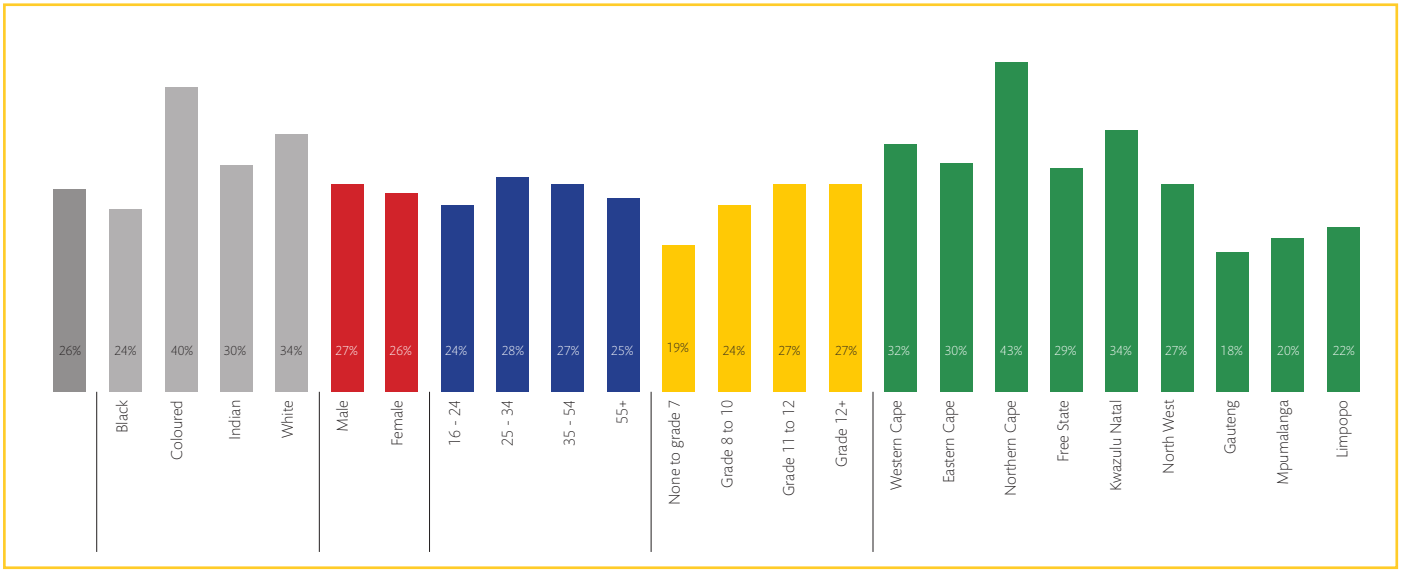
The highest alignment with this cluster is found in Gauteng (28%) and Mpumalanga (25%). In Gauteng, this may reflect heightened awareness of inequality within the country's most urbanised and economically unequal province, where extreme wealth and poverty coexist in close proximity. The visibility of homelessness, joblessness, and overburdened public infrastructure may deepen empathy, especially among older or economically stable citizens who recognise the need for greater inclusivity. Mpumalanga's (25%) strong alignment is particularly notable given its largely rural context. It likely reflects lived proximity to poverty and a daily awareness of economic hardship within family and community structures, reinforcing solidarity with those in need.

Eastern Cape (19%) also scores highly, consistent with its persistent developmental challenges and high levels of outmigration. Residents may show heightened concern for vulnerable communities due to intergenerational exposure to poverty, economic exclusion, and social support reliance. In contrast, provinces such as the Western Cape (11%), Northern Cape (11%), Free State (13%), KwaZulu-Natal (10%), Northwest (10%), and Limpopo (12%) display lower alignment. While these are not insignificant figures, the scores may reflect greater focus on direct survival, disillusionment with redistribution mechanisms, or a shift toward other forms of cohesion (such as horizontal community bonds or institutional reliance). In the Western Cape, in particular, lower alignment could also indicate a more individualised socio-economic orientation or perceived distance from broader national poverty narratives.

Social Cohesion cluster 5: Victimised and discriminated against for having a job

The fifth and final cluster is a group that lives in communities where service delivery is acceptable. The cluster has regular access to the economy, meaning people can change jobs, look for other opportunities, practice career change, personal development, and other access to the economy benefits. It reflects a growing sentiment of perceived unfairness among those who feel burdened for being economically active and self-reliant. This group expresses frustration with rising costs, limited public service delivery, and the need to duplicate essential services privately, despite contributing through taxes. While not opposed to national unity, they seek recognition and fairness in how responsibility and benefit are distributed, highlighting the need for visible delivery and shared accountability in sustaining cohesion.

Figure 89:Social Cohesion cluster 5: Victimised and discriminated against for having a job



Source: Brand SA: State of the Nation Report 2024

Social Cohesion Cluster 5 by Province

The strongest alignment with Cluster 5 is seen in the Northern Cape (43%), Western Cape (32%), KwaZulu-Natal (34%), and Eastern Cape (30%). In the Northern Cape, high alignment may reflect a combination of geographic isolation, limited public service infrastructure, and a reliance on self-provisioning, which amplifies frustration among those who feel excluded from equitable delivery despite contributing to the system. In the Western Cape, which often displays stronger individualistic and service-oriented expectations, the sentiment may be driven by dissatisfaction with perceived inefficiencies in national redistribution and the burden of having to maintain dual service systems, public and private, especially in middle-income suburbs. The high score in KwaZulu-Natal may point to widening gaps between urban and rural service experiences, particularly in areas where local infrastructure is strained and residents feel they are paying for

services they do not receive. Similarly, in the Eastern Cape, a province facing persistent developmental backlogs, residents with steady employment may feel isolated in their efforts to maintain quality of life in the absence of consistent public delivery.

Lower alignment in Gauteng (18%), Mpumalanga (20%), and Limpopo (22%) may reflect differing socio-economic dynamics. In Gauteng, broader access to private alternatives and service infrastructure may temper perceptions of burden, while in Mpumalanga and Limpopo, where economic pressures and service gaps are more deeply embedded, the population may be more focused on structural inequality or survival rather than feeling overtaxed or under-recognised.

Social Cohesion Cluster 5 by Age, and Demographic Profile

This cluster is significantly represented among Coloured respondents (40%), followed by White (34%), Indian (30%), and Black (24%) respondents. Among Coloured and Indian respondents, high alignment may be influenced by perceptions of marginalisation within socio-economic transformation narratives and a sense that, despite economic participation, their concerns are overlooked. White respondents may feel similarly about bearing the brunt of taxation without visible returns. Among Black respondents, though lower by comparison, 24% alignment suggests that this sentiment is not exclusive to minority groups – there is growing frustration across racial lines where delivery falls short of expectations despite personal contribution.

From a gender perspective, alignment is fairly balanced: male respondents (27%) slightly outpace females (26%), which may reflect a marginally higher tendency among men to see themselves as primary providers and, therefore, more exposed to the burdens of duplicating state services. The age profile of this cluster is remarkably consistent across age groups, with the highest alignment among 25–34 year olds (28%) likely reflecting those in early career stages balancing rising living costs, taxes, and household responsibilities. The scores for 16–24 (24%), 35–54 (27%), and 55+ (25%) suggest that this sense of burden cuts across generations, underlining that the frustration is not rooted in life stage, but in a shared perception of systemic imbalance.

In terms of education, the strongest alignment appears among those with Grade 11 – 12 and Grade 12+ (both at 27%), indicating that this sentiment is more pronounced among the better educated those who are more likely to be formally employed, tax-paying, and financially literate. Those with Grade 8 – 10 (24%) also show moderate alignment, while respondents with 0 – Grade 7 (19%) are least aligned, which is consistent with lower formal economic participation and fewer expectations around institutional reciprocity. Cluster 5 reflects a deeply felt tension among working and middle-class South Africans who perceive themselves as overburdened and under-supported. Their concerns highlight the importance of visible, equitable delivery, and a narrative of shared responsibility in national development. For the Nation Brand, this cluster calls attention to the need for targeted communication that recognises contribution i.e. citizens playing their part, affirms fairness, and rebuilds confidence in the state's role as a reliable and responsive partner especially for those striving to sustain themselves and others.

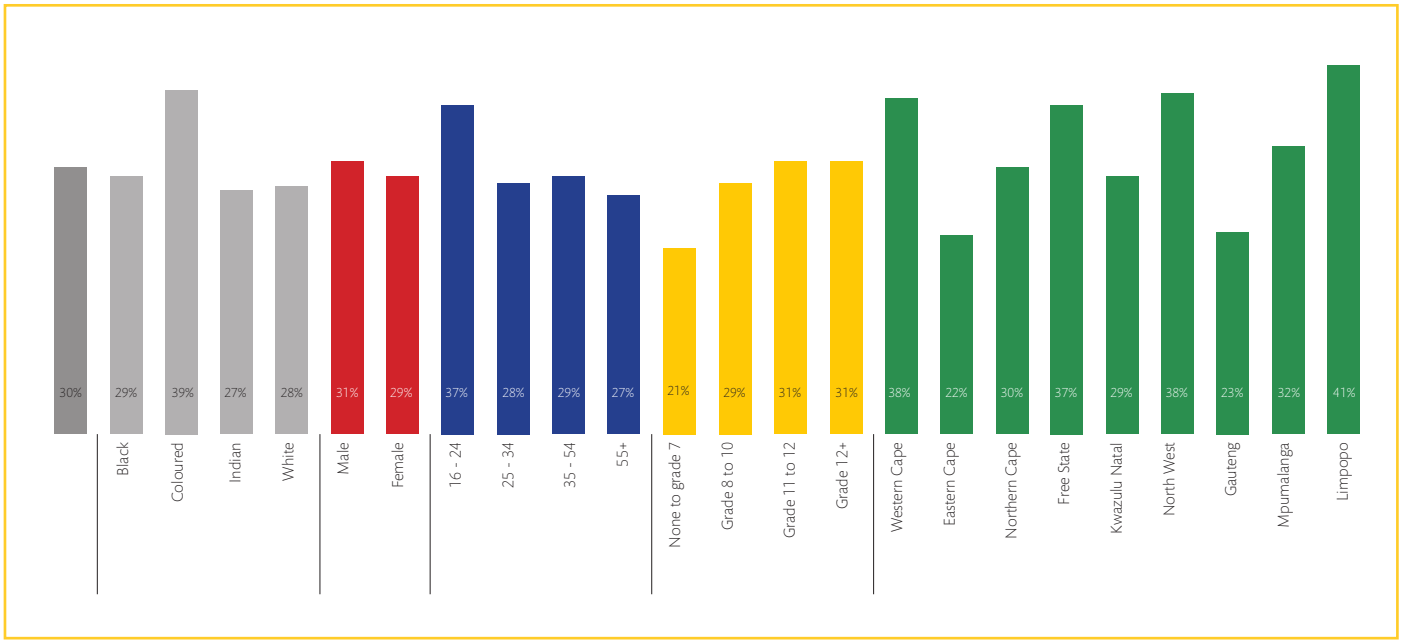
Annexure 3: National Pride Clusters by Province, Age, and Demographic Profile

An analysis of the four clusters from a demographic perspective reveals nuanced distinctions across race, age, and education. The first three clusters are more strongly associated with internal drivers of pride such as national achievements, shared values, or moments of excellence and tend to align with respondents who express deeper emotional and civic engagement. The fourth cluster, while less emotionally defined, reflects a more globally oriented view of national pride, associated with respondents who see South Africa's reputation through the lens of its international appeal as a destination for work, travel, study, and investment.

National Pride cluster 1 by Province

The first cluster has a stronger focus among young Coloured people, with some highlights in specific provinces. There is a slight indication across levels of education and perhaps a little more relevant to international influence, as social media usage and frequency of engagement on these platforms correlate strongly with the level of education. Very few differences are noted between gender groups, as it remains marginally the same across the national pride clusters.

Figure 82: National Pride cluster 1: South Africa's achievements, both locally and internationally



Source: Brand SA: State of the Nation Report 2024

Cluster 1 reflects a deep-rooted pride in South Africa's social, political, and economic achievements, both within its borders and on the global stage. This cluster, representing 30% of the population, embodies a historically grounded and forward-looking sense of national identity one that draws confidence from the country's democratic legacy, regional leadership, and international recognition. It is the most civically engaged cluster, anchored in a belief that South Africa's journey, though complex, offers tangible proof of its resilience and influence.

At a provincial level, Limpopo leads with the highest score (41%), followed closely by Northwest (38%), Free State (37%), and Western Cape (38%). Mpumalanga (32%) also shows strong alignment. These provinces have traditionally strong cultural and social identity formations, which may influence this collective sense of achievement. Eastern Cape (22%) and Gauteng (23%) show lower levels, perhaps reflecting more nuanced or context-specific sentiments, especially given Gauteng's urban pressures and Eastern Cape's development challenges. KwaZulu-Natal (29%) and Northern Cape (30%) reflect moderate alignment.

National Pride Cluster 1 by Age, and Demographic Profile

As aforementioned this cluster, representing 30% of the population, draws pride from the country's social, political, and economic progress, and its global standing as a diverse and resilient nation. It is especially prominent among Coloured (39%) and Black (29%) South Africans, with slightly lower but still significant representation among Indian (27%) and White (28%) citizens. This cross-racial resonance suggests a unifying sentiment rooted in national performance and recognition. In terms of gender, both men (31%) and women (29%) express comparable levels of pride in this dimension, indicating that this form of pride cuts across gender lines and is widely shared.

The strongest age-based association comes from young South Africans aged 16 to 24 (37%), followed by those in the 35 to 54 age range (29%) and 25 to 34 (28%), with those 55 and older slightly lower at 27%. This suggests that younger generations, often described as more critical or detached, are in fact strongly connected to the country's success and potential, particularly when it comes to global recognition and local achievements.

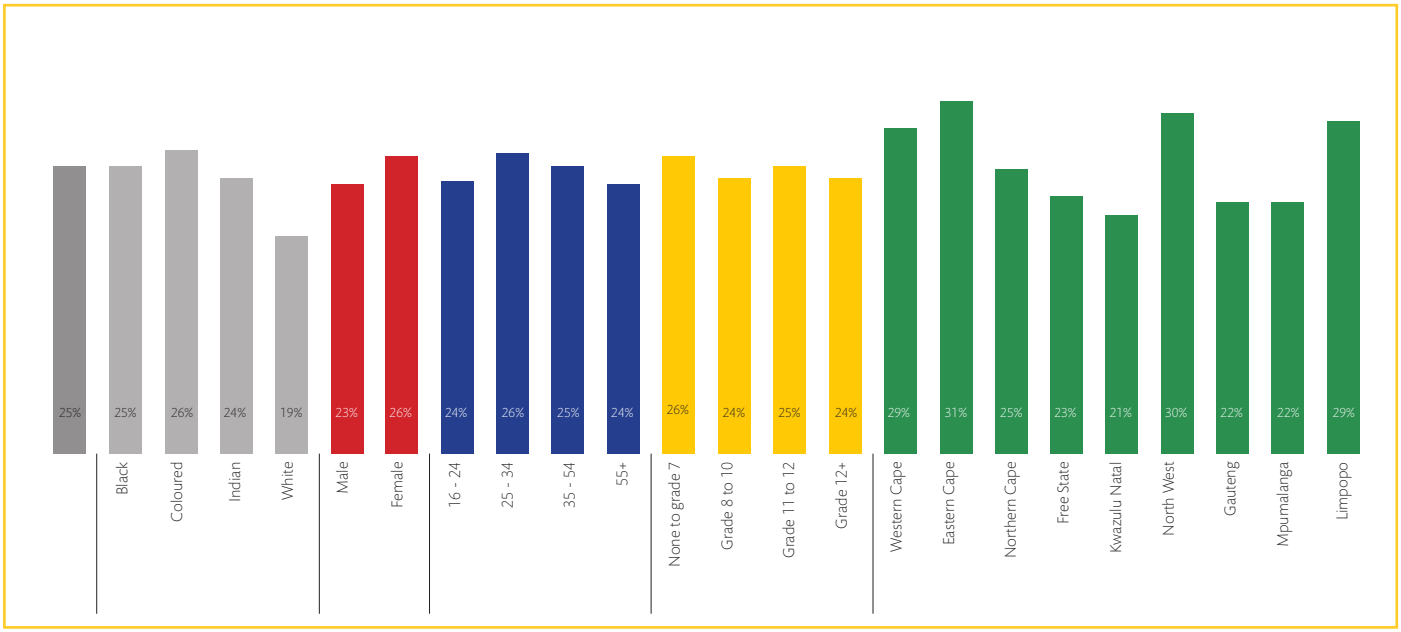
Educationally, the cluster is most represented among individuals with Grade 11 to 12 (31%) and post-matric qualifications (31%), suggesting that national achievements are most resonant with those who have greater access to information, media, or civic education. However, significant representation is also seen among those with lower levels of education, such as Grade 8 to 10 (29%) and 0 to Grade 7 (21%), underscoring the emotional reach of this form of national pride.

Overall, this cluster captures a widely shared and emotionally grounded sense of national pride, one that is tied not only to heritage and identity, but also to how South Africans see their place and performance in the world.

National Pride cluster 2: Pride is a characteristic, motivated by a unique spirit

National Pride Cluster 2, which represents 25% of the population, reflects a deeply embedded sense of pride rooted in the unique character and spirit of South Africa. This includes values such as Ubuntu, the celebration of diversity, a belief in innovation, and the potential that defines the South African identity. This cluster captures the emotional tone of a nation that sees its uniqueness not only in its history but in its ability to imagine a better future.

Figure 91: National Pride cluster 2: Pride is a characteristic, motivated by a unique spirit



Source: Brand SA: State of the Nation Report 2024

National Pride cluster 2 by Province

Provincially, this cluster finds its strongest resonance in the Eastern Cape (31%), North-West (30%), Western Cape (29%), and Limpopo (29%). The Eastern Cape, often noted for its strong communal cohesion and deeply embedded social values, aligns closely with the character-driven pride of this cluster. The North-West, which also exhibits higher scores in social cohesion cluster 3 (horizontal cohesion), shows that interpersonal trust and community bonds can strongly reinforce a pride in diversity and shared purpose. In Limpopo, where traditional structures and intergenerational bonds remain integral to daily life, the emphasis on Ubuntu and collective innovation finds clear expression. The Western Cape, despite its individualised economic structure, presents a high alignment in this cluster possibly reflecting pride in its cultural diversity, cosmopolitan identity, and its innovative energy, especially in urban centres like Cape Town.

Northern Cape (25%), Free State (23%), and Gauteng (22%) show moderate alignment with this cluster. While Gauteng is often more closely associated with economically driven or achievement-based pride (as seen in Cluster 1), its moderate alignment here may reflect an emerging pride in multicultural vibrancy and its status as a national hub for innovation and migration. Free State and Northern Cape, with historically smaller populations and distinctive cultural footprints, may find resonance in the unifying elements of Ubuntu and shared resilience.

Mpumalanga (22%) also holds steady, with rural identity and close-knit community life likely contributing to pride in the values of interconnectedness and mutual care. KwaZulu-Natal (21%), while historically rich in cultural pride and heritage, records the lowest alignment in this cluster potentially due to the complex interplay of competing identity narratives and socio-political dynamics that shape perceptions of shared possibility.

Collectively, this pattern suggests that pride rooted in values and national character is not confined to traditionally high-performing provinces, but instead thrives where interpersonal cohesion, cultural appreciation, and belief in collective agency are part of daily lived experiences.

National Pride Cluster 2 by Age, and Demographic Profile

The cluster is supported most strongly by Coloured respondents (26%), followed by Black (25%), Indian (24%), and White (19%) populations. This indicates a strong resonance among historically marginalised groups who may see Ubuntu and diversity not only as aspirational ideals but as necessary social frameworks for inclusive recognition and advancement. The lower alignment among White respondents may suggest a preference for other forms of pride linked to individual achievement or global positioning, such as seen in Clusters 3 and 4. The gender split reveals slightly higher identification among females (26%) compared to males (23%). This difference, though modest, reflects a broader pattern observed in social and behavioural studies where women tend to prioritise relational, community-based, and values-oriented engagement. The emphasis on Ubuntu and social care within this cluster may therefore resonate more strongly with female respondents, who are often attuned to the ethical and emotional dimensions of national identity.

Across age groups, the appeal of this cluster remains notably consistent, with only marginal variation. Young adults between the ages of 25 and 34 exhibit the strongest alignment at 26%, closely followed by respondents aged 35 to 54 and those over 55, both at 25% and 24% respectively. Youth aged 16 to 24 also show strong support at 24%. This relatively even distribution across the life course suggests that the values anchoring this cluster ubuntu, diversity, innovation, and shared possibility are not exclusive to a particular generation but instead represent a unifying ethos that resonates widely. The cluster captures a forward-looking yet deeply rooted form of national pride that cuts across generational experience.

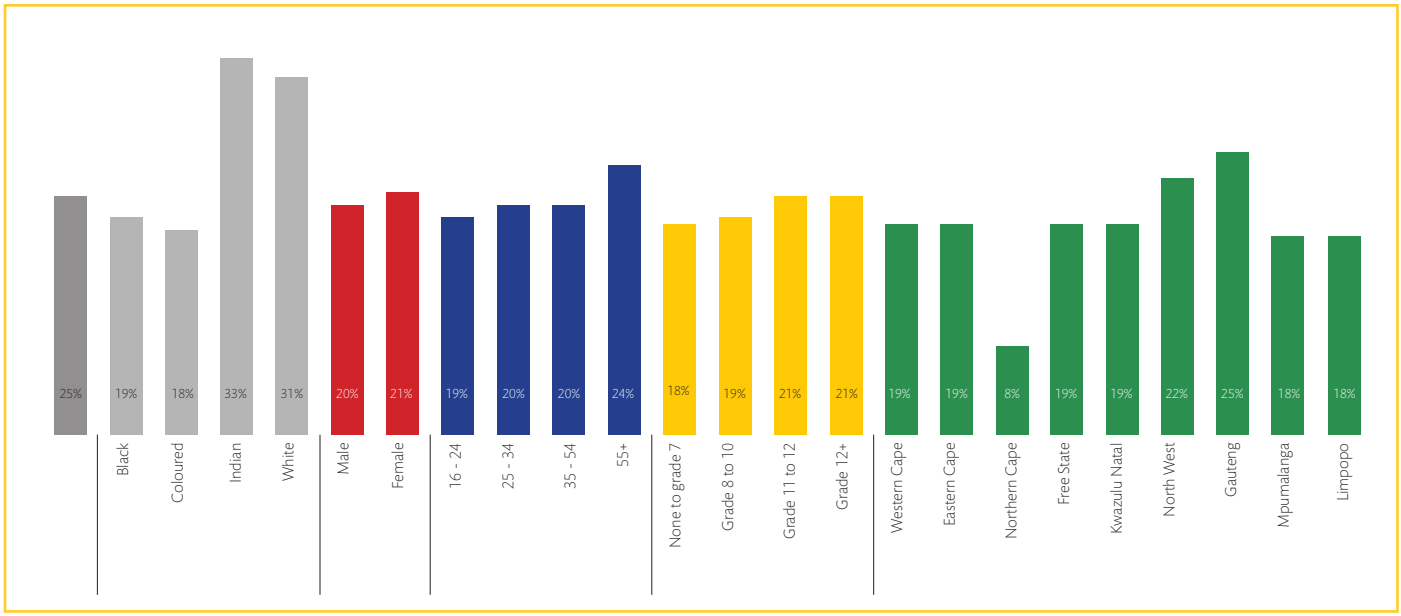
From an education perspective, this identity expression draws steady support across all levels. Those with a Grade 11 to 12 education level are the most prominent at 27%, followed by individuals with a post-matric qualification (25%), those with a Grade 8 to 10 education (24%), and respondents with up to Grade 7 education (23%). The relatively stable support across educational tiers implies that this form of national pride is not shaped primarily by academic attainment, but by a shared belief in the moral and innovative potential of South Africa. The aspirational nature of the cluster emphasising dignity, creativity, and collective progress speaks to a broad cross-section of society regardless of formal qualifications.

The relatively even spread of support across demographic lines confirms that values-based national pride is a shared narrative in South Africa not limited to any one group, but layered through lived experience, cultural identity, and collective aspiration. It stands as one of the most socially integrative clusters, providing a durable foundation for the evolving story of the Nation Brand.

National Pride cluster 3: South Africa is beautiful with great sport, art, and science

The third cluster (21% of the population) is shaped by moments of collective recognition and excellence, specific achievements in sport, the arts, science, and other fields that evoke pride when South Africans excel on global platforms. These events, often led by individuals who represent the country's talent and resilience, offer symbolic reminders of the nation's potential. However, these moments are not always free from complexity. They are often accompanied by reflections on the broader socio-economic realities, as seen when national figures like Siya Kolisi use their platforms to acknowledge both triumph and challenge. While this is the smallest of the four pride clusters, it reflects the power of representation and the emotional lift provided by stories of South Africans who achieve against the odds.

Figure 84: National Pride cluster 3: South Africa is beautiful with great sport, art, and science



Source: Brand SA: State of the Nation Report 2024

National Pride cluster 3 by Province

At a provincial level, identification with National Pride Cluster 3, which centres on pride inspired by achievements in sport, arts, science, and talent, reveals meaningful variation. Gauteng records the highest association at 25%, consistent with its status as South Africa's economic and cultural epicentre. The province frequently hosts national events and is home to high-profile individuals whose accomplishments drive these episodic moments of pride. North-West follows closely at 22%, suggesting a strong provincial resonance with symbolic national achievements, perhaps linked to growing regional recognition in cultural or sporting arenas.

Western Cape, Eastern Cape, Free State, and KwaZulu-Natal each score 19%, suggesting a balanced yet moderate identification with this pride cluster. Despite differing in economic capacity and regional focus, residents in these provinces demonstrate a shared emotional connection to national moments of excellence, particularly when South Africans succeed on international stages.

Mpumalanga and Limpopo each score 18%, slightly below the national average of 21% for this cluster. These provinces may experience fewer direct associations with individual national icons but still reflect an awareness and pride when such moments occur. Notably, the Northern Cape registers the lowest association at 8%, which may be influenced by its limited exposure to nationally celebrated figures or platforms in the arts, sciences, or sport. This does not suggest a lack of pride but rather highlights the importance of visibility and representation in shaping provincial sentiment around these symbolic achievements.

National Pride Cluster 3 by Age, and Demographic Profile

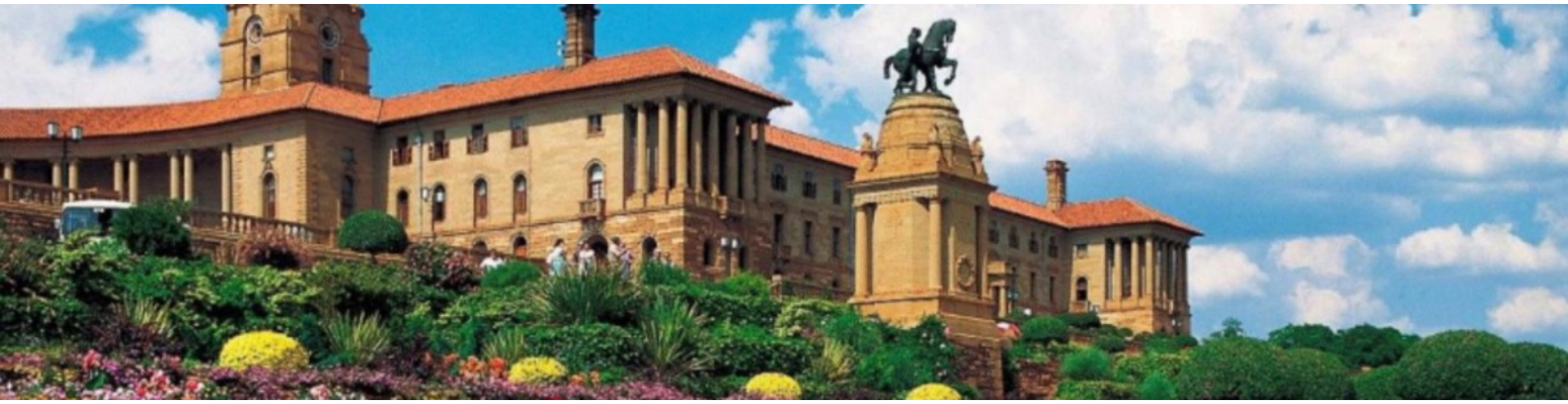
From a demographic perspective, Cluster 3 is most strongly identified with by the Indian (33%) and White (31%) population groups. These respondents tend to associate national pride most directly with visible excellence in sports, science, and the creative industries which are areas in which South Africa has consistently achieved international acclaim. However, while Black (19%) and Coloured (18%) respondents show lower identification with this cluster, it does not indicate a lack of interest or pride in these domains. On the contrary, these groups are often active supporters and followers of national sporting heroes, artistic achievements, and cultural icons. Their national pride, however, appears to be more firmly rooted in broader identity-based, historical, or values-driven narratives reflected in other clusters particularly those emphasising Ubuntu, resilience, and shared national progress. In terms of gender, the data shows a relatively balanced pattern, with 21% of females and 20% of males identifying with this cluster. This close alignment across genders indicates that symbolic and performance-based sources of pride, such as sporting triumphs or artistic recognition, continue to resonate universally. Notably, the parity suggests that these moments of collective celebration cut across gender divides and serve as accessible entry points into the national pride discourse.

Age differences present a slightly more defined gradient. Older South Africans (55+ years) show the strongest identification at 24%, reflecting their lived experience of multiple eras of national milestones, heroes, and transformative public moments. Meanwhile, younger South Africans (16–24 years) report a lower alignment at 19%, possibly signalling a generational shift toward future-facing or values-led expressions of pride, such as innovation, inclusion, and opportunity. The middle-age groups (25–34 years and 35–54 years) each sit at 20%, suggesting a steady, if moderate, connection to pride expressed through symbolic achievements.

Educational differences across the cluster remain relatively stable, with 18% of respondents with up to Grade 7, 19% with Grade 8–10, and 21% each among Grade 11–12 and Grade 12+. This consistency reinforces that pride based on standout performances and achievements, whether

in sport, science, or the arts, is broadly accessible across education levels. These sources of pride are often mediated through mass media, public celebrations, and national identity rituals, rather than through policy or institutional engagement.

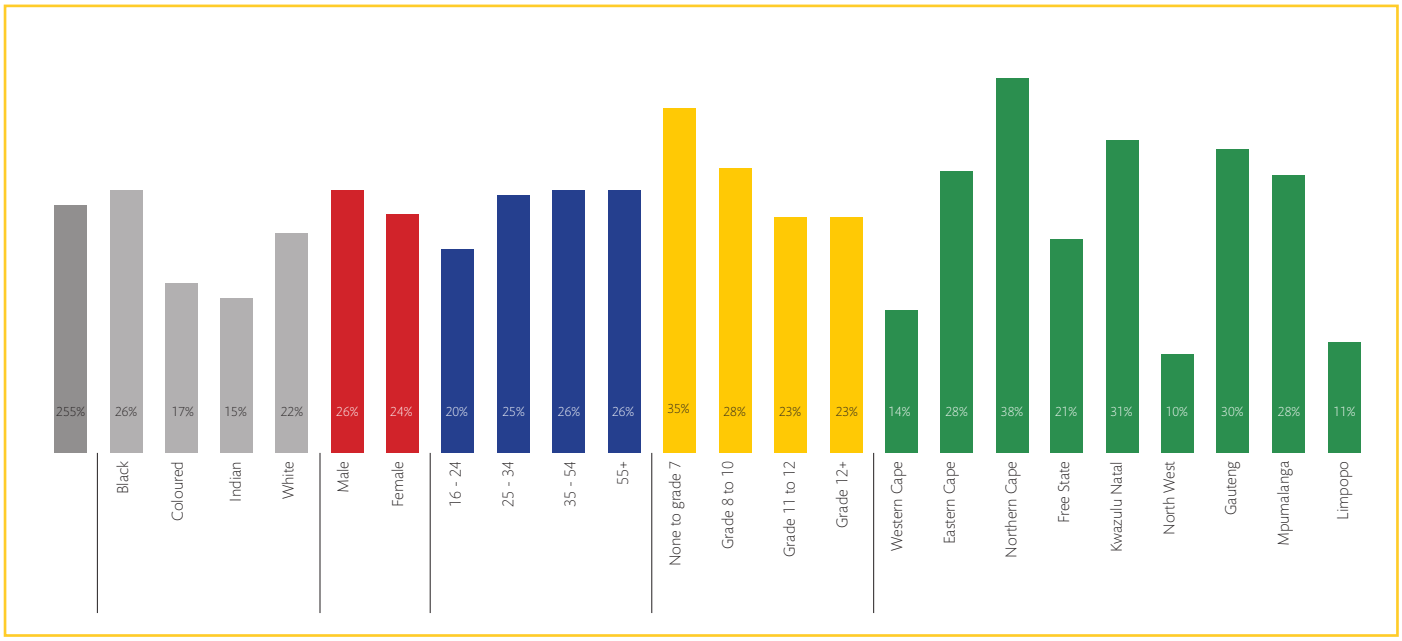
Cluster 3 reflects the episodic, high-impact emotional triggers that shape national pride during moments of national recognition. While not dominant across all groups, these expressions remain vital to the nation brand. They serve as visible reminders of excellence, resilience, and possibility, particularly among groups that draw confidence from South Africa's stature and representation on the global stage.



National Pride cluster 4: Recommended as a place to work, travel, study and invest in.

The final cluster reflects a clearly defined and globally oriented sense of national pride. At a national level, 25% of South Africans express their pride through this internationally oriented lens it highlights South Africa's appeal as a place of opportunity, a country to work in, travel to, study in, or invest in. While it may be less emotionally expressive than other clusters, it reflects confidence in South Africa's positioning on the international stage and the value it offers to the world.

Figure 85: National Pride cluster 4: Recommended as a place to work, travel, study, and invest in.



Source: Brand SA: State of the Nation Report 2024

National Pride cluster 4 by Province

At a provincial level, support for this internationally oriented cluster which sees pride in South Africa as a destination for work, travel, study, and investment presents a complex yet revealing pattern. KwaZulu-Natal registers the highest score at 31%, likely influenced by its rich cultural heritage, coastline, and ongoing efforts to position Durban as a global port and conference hub.

Gauteng follows closely at 30%, reflecting its role as the country's economic engine and international business gateway. Eastern Cape, Mpumalanga, and Northern Cape all record strong scores at 28%, suggesting a resonance with international recognition and the aspirational value of being seen as a place of global opportunity, even in less globally connected settings.

The Free State registers a moderate score at 21%, while Limpopo (11%) and North-West (10%) fall at the lower end, possibly reflecting more locally grounded views of national pride with less orientation towards international engagement. Interestingly, Western Cape, despite being one of the country's most globally recognized destinations, scores the lowest at 14%. This appears counterintuitive given Cape Town's repeated accolades as one of the world's best cities. However, this may point to a provincial pride that is more deeply rooted in lifestyle, local identity, and tangible lived experience than abstract international affirmation. Alternatively, it may also reflect that pride in the Western Cape is more often tied to cluster one's focus on achievement or cluster two's character-based pride.

These patterns highlight the importance of understanding provincial nuances where pride in South Africa's global appeal does not always align directly with external perception or accolades. Rather, it is shaped by how residents experience and interpret their province's place in the national and global story.

National Pride Cluster 3 by Age, and Demographic Profile

By race, the cluster sees strong support from Black respondents (26%), with White (22%), Coloured (17%), and Indian (15%) respondents following. This distribution suggests that while the cluster appeals broadly, it resonates most with the majority population, who increasingly see South Africa's global presence as a point of pride and opportunity. Lower scores among Indian and Coloured respondents may reflect differing degrees of exposure to or belief in the benefits of global integration or public delivery systems that enable these opportunities. Gender analysis indicates men (26%) marginally having a stronger alignment than women (24%) possibly reflecting greater engagement with economic or mobility opportunities, which are central to this cluster's outlook.

Age trends reveal a steadily increasing identification with the cluster from younger to older age groups: from 20% among 16 to 24-year-olds to 26% among those aged 35 and older. This pattern implies that perceptions of South Africa's international value may be shaped by maturity, life stage, and exposure to professional or investment ecosystems. The relatively lower alignment among youth who scored highest in Cluster 1 (broad national achievements) reinforces the idea that their pride is increasingly tied to transformative potential rather than current institutional standing.

Education patterns show a strong skew toward those with lower levels of formal schooling: 35% of those with Grade 7 or below fall into this cluster, decreasing to 28% among those with Grade 8–10, and 23% among those with Grade 11–12 and tertiary education. This suggests that the appeal of this message that South Africa is a land of opportunity holds powerful resonance among those who may not express pride through academic or technical achievements, but rather through broader developmental optimism and national aspiration.

Annexure 4: Detailed Provincial Review

The provincial review of key indicators illustrates the differences. A summary of each province is included.

12.1. Eastern Cape

The basic demographic profile mimics the national profile well although the average income is 23% below the national average monthly income. The province is dominated by the Nguni language group, particularly the Xhosa language. Level of education is lightly lower than the average and more people are not working compared to the national profile. These could be parents or grandparents looking after children while others are away working.

Main source of information in the province is the television. Sentiments suggest that people do not feel much has improved since democracy although they are satisfied with how democracy works. People in this province generally do not reach out and stay within their own clusters and communities.

The awareness of the GNU is high and the expectations that things will change for the better under the leadership of the GNU is very optimistic. The outlook of the province is generally positive although there is a concern about the level of inequality. Levels of crime in the province have increased although more than the average still feel safe.

In terms of a sense of identity, the province has a strong sense of character, most notably in beliefs and features such as language and culture. These aspects also translate into a sense of national pride based on Ubuntu, diversity, innovation and possibilities. The province has stronger internally motivated sense of pride than external aspects such as sports and other achievements.

The province's social cohesion profile is dominated by two characteristics: A strong sense of ver5tical cohesion where there is a reliance on the state to take care of community services, schools, law and order, etc. However, there is also a sense of feeling victimised for having to support those that do not have a job because the state support mechanisms are functioning below par.

Active citizenship is in its early stages with many activities planned and some being successful but without momentum. The commitment is there and that is good. It is an active province with various levels of activities going on. Perhaps the inkling to stay within the known boundaries of their own communities are why the active citizenship initiatives will probably not grow to provincial level initiatives but stay small, fragmented, but strong.

The province has a high level of commitment to what it means to be South African, they associate most with the Proud Character Supporters behavioural cluster.

Size of the province

10.8%

South Africans living in the province (16+)

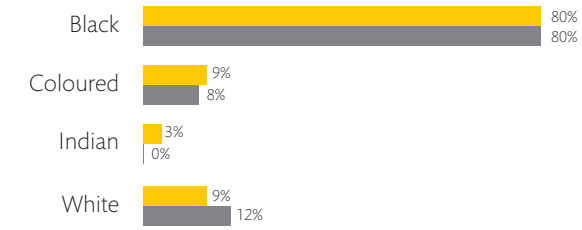
4 550 542

Average number of people in the household:

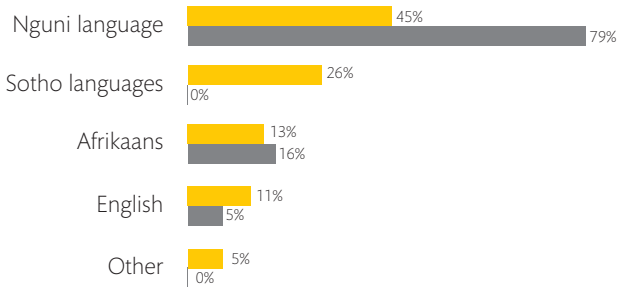
3.06 | **3.51**

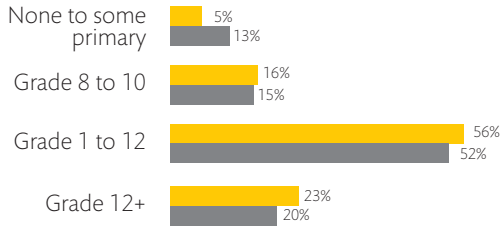
Average Monthly Gross Household income

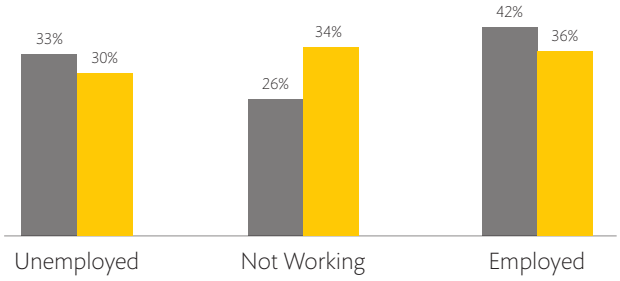
R10 873 (Provincial) | **R14 196** (National)



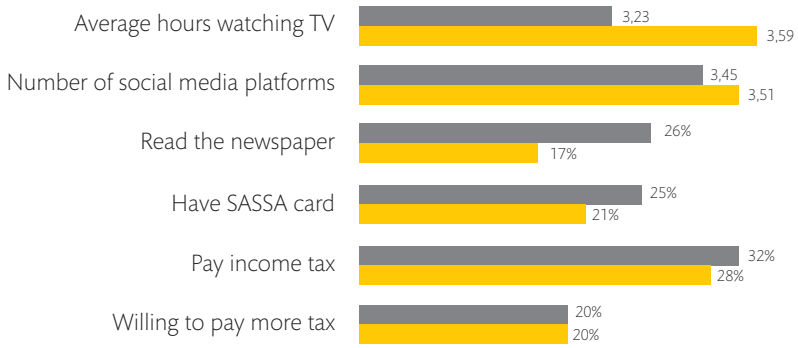
Language, employment, and education profiles.







Connectedness and social support.

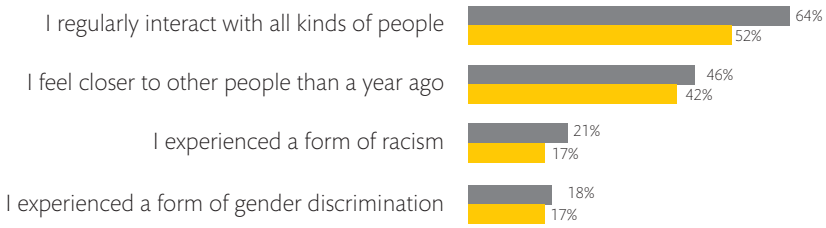


Views about democracy.

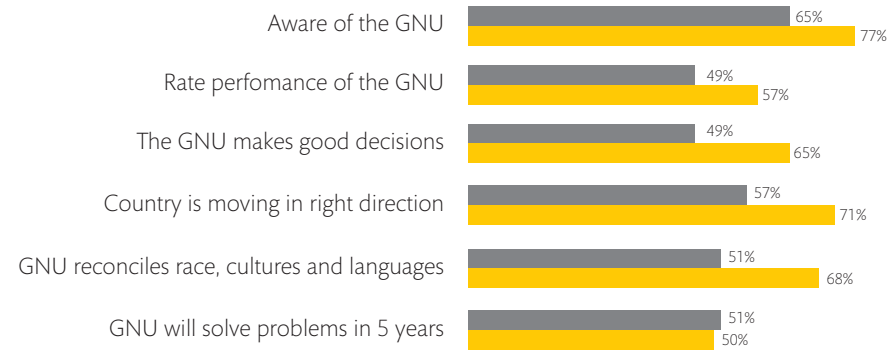
Better off since a democracy	Our democracy is maturing	Satisfied with how democracy works	Expected share of the vote for the ANC
38% | 49%	69% | 59%	63% | 52%	44% | 40%

Source: Brand SA: State of the Nation Report 2024

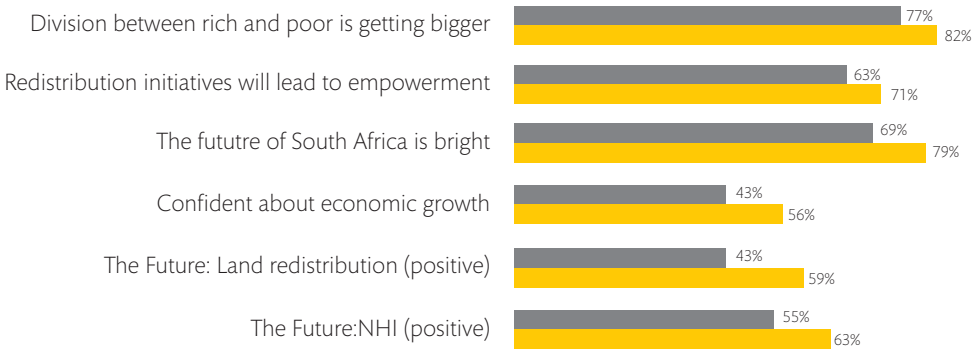
Social engagements.



GNU – Government of National Unity



Level of optimism

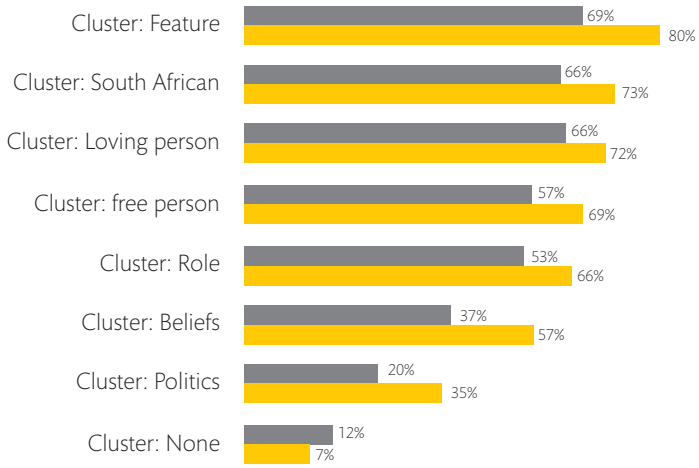


Safety and security

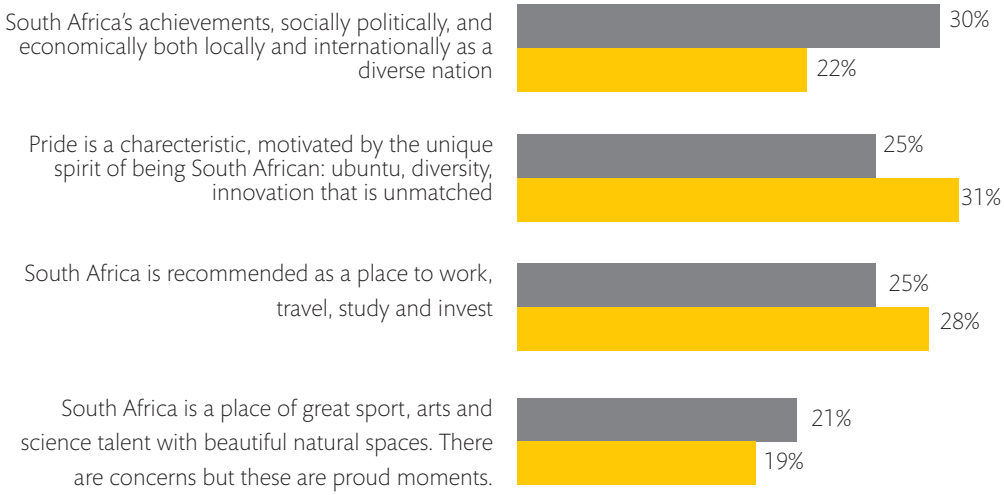
Crime increased since last year	Feel safe in SA	Confident Police will come when I call
53% | 44%	32% | 29%	63% | 52%

Source: Brand SA: State of the Nation Report 2024

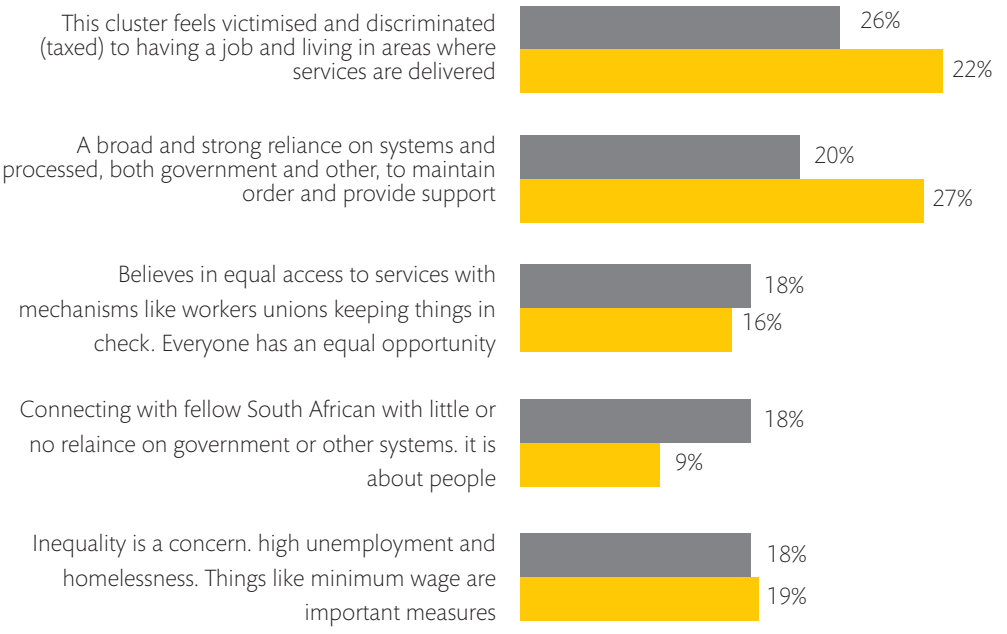
Identity clusters.



National Pride

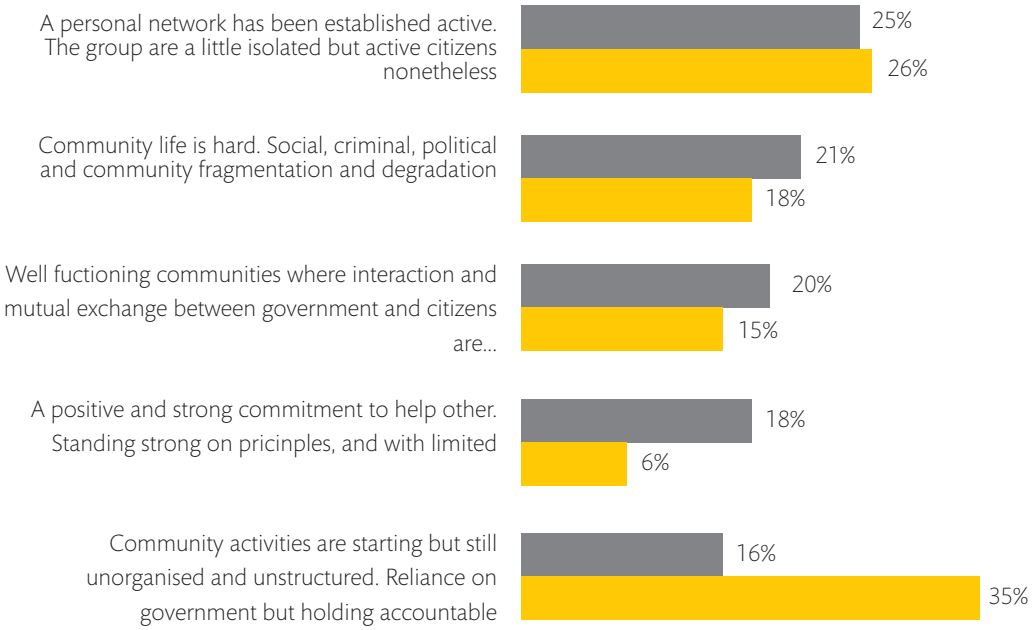


Social Cohesion

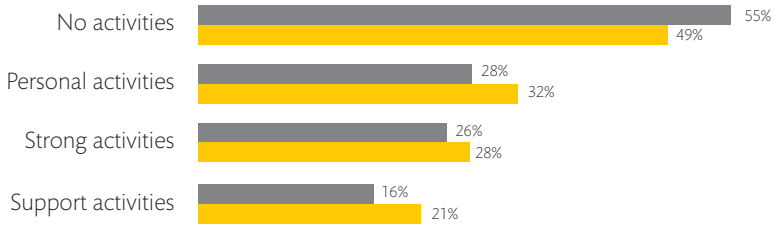


Source: Brand SA: State of the Nation Report 2024

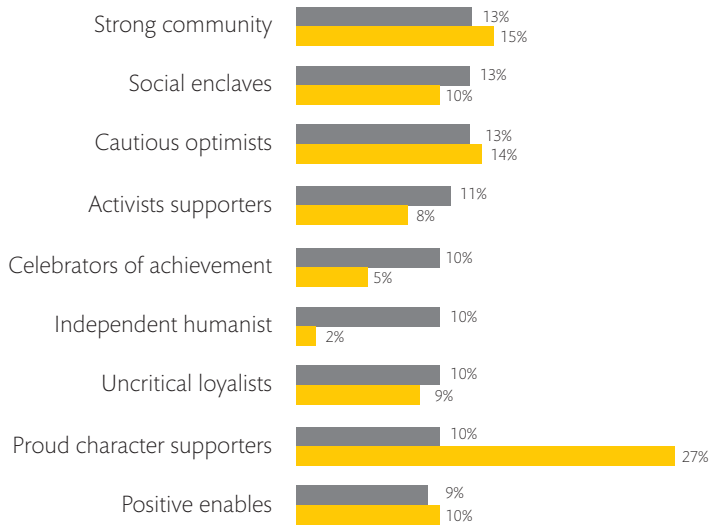
Active Citizenship



Activity intensity



Behavioural expression comparison



Source: Brand SA: State of the Nation Report 2024

12.2. Free State

The basic demographic profile mimics the national profile well although the average income is 15% above the national average monthly income. The province has a higher white race group community than the national average of which many are part of the broader farming community. The dominant language is Sesotho.

Television viewership is lower than the average, but people read the newspaper more frequently. The province is not willing pay more taxes and slightly more than the national average pay taxes. There is a lower level of confidence in democracy with only 44% (52% national average) feeling satisfied with how democracy works. In line with this, the province is less optimistic about the GNU.

People in the Free State do not interact with one another as much and there are higher levels of racism and gender discrimination than the national average.

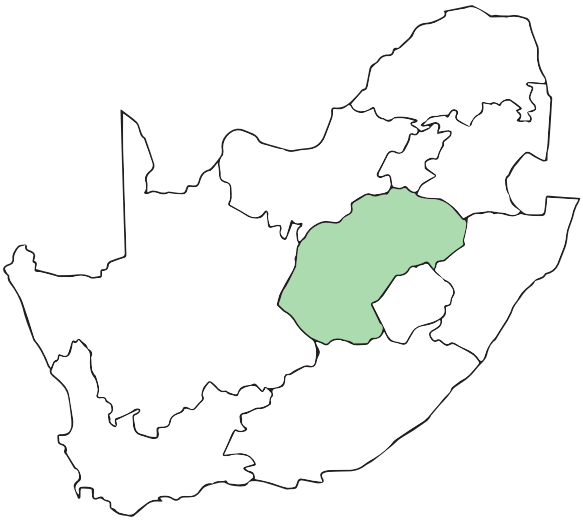
With large parts of the province dedicated to agriculture, the land redistribution initiatives are not well received. Despite these factors, crime has not increased that much, and more people feel safe in the Free State than elsewhere in the country.

There are several tension points in the province and hence most of the identity clusters perform below par except role identity such as being a parent, or a role in the community and beliefs (most notably religious beliefs). The "None" identity cluster %age is high.

From a national pride point of view, it is mainly about the achievements of South Africans and South Africa that drive a sense of pride. Social cohesion is characterised by a sense of feeling victimised and horizontal cohesion with those that people connect with. The social cohesion framework does not show strong disparities with the national averages but these two that were mentioned stand out.

Active citizenship, based on the social cohesion findings, tend to be slightly more dominant in two clusters, fragmented but active citizenship structures and well organised structures. In line with this it is expected that the activity strength will be strong. The behavioural group clusters support the notion that Strong Community Networks, and Social Enclaves dominate the Free State profile.

The Free State is therefore characterised as being slightly fragmented with tension points based on land, race and gender profiles. Despite these tendencies, there are pockets of active citizenship and social cohesion strengths although these are focussed on specific community initiatives and areas.



Size of the province

4.8%

South Africans living in the province (16+)

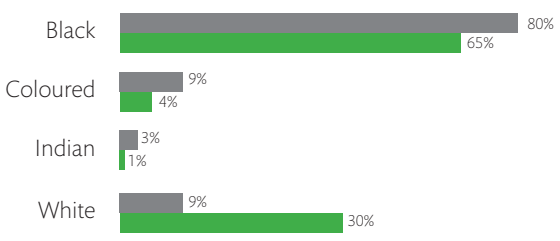
2 017 824

Average number of people in the household:

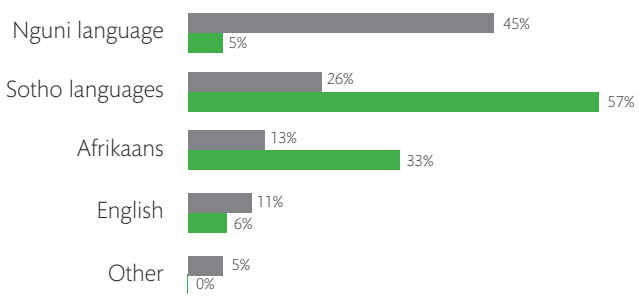
3.00 | **3.51**

Average Monthly Gross Household income

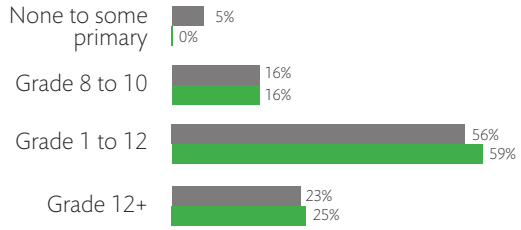
R16 299 Provincial | **R14 196** National

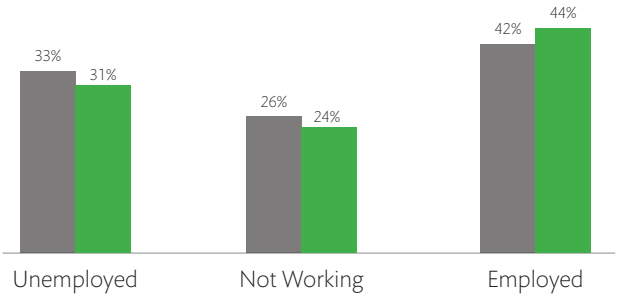


Language, employment, and education profiles.

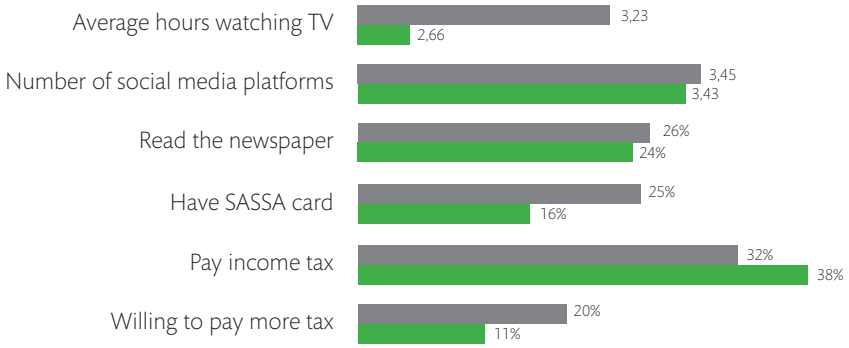


Source: Brand SA: State of the Nation Report 2024





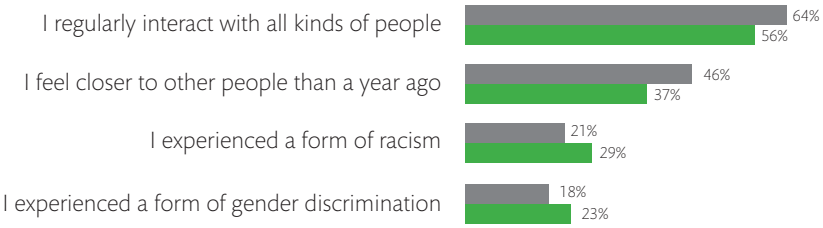
Connectedness and social support.



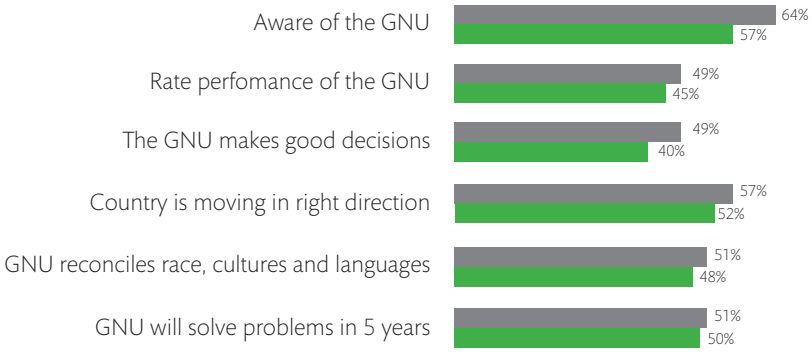
Views about democracy.

Better off since a democracy	Our democracy is maturing	Satisfied with how democracy works	Expected share of the vote for the ANC
41% | 49%	49% | 59%	44% | 52%	44% | 40%

Social engagements.

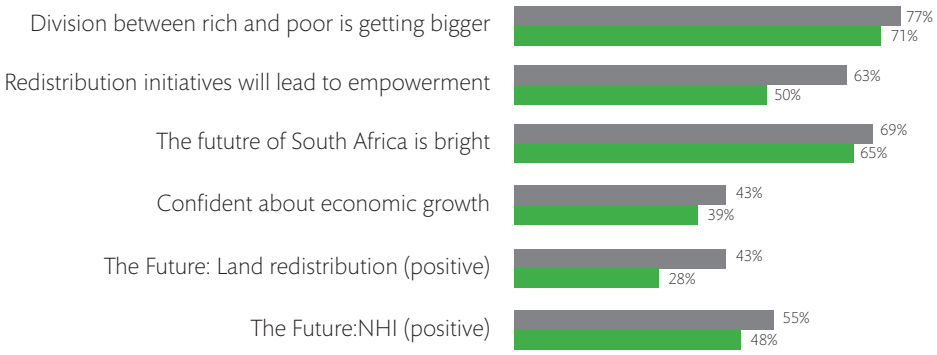


GNU – Government of National Unity



Source: Brand SA: State of the Nation Report 2024

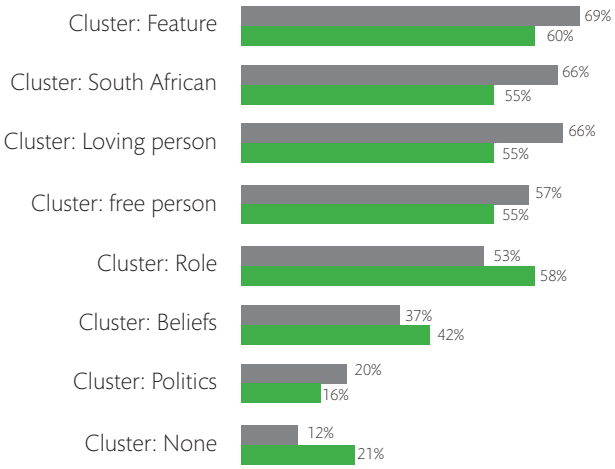
Level of optimism



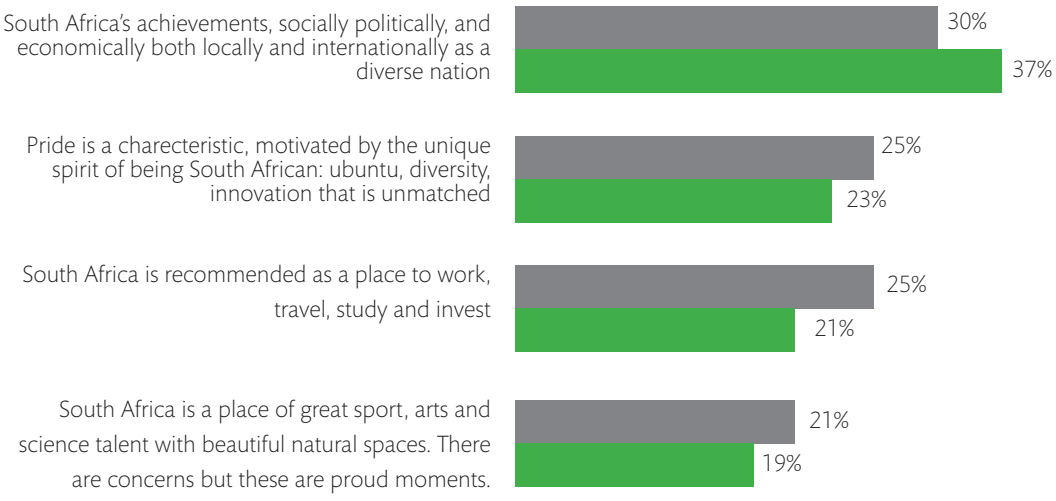
Safety and security

Crime increased since last year	Feel safe in SA	Confident Police will come when I call
31% | 44%	35% | 29%	32% | 52%

Identity clusters.

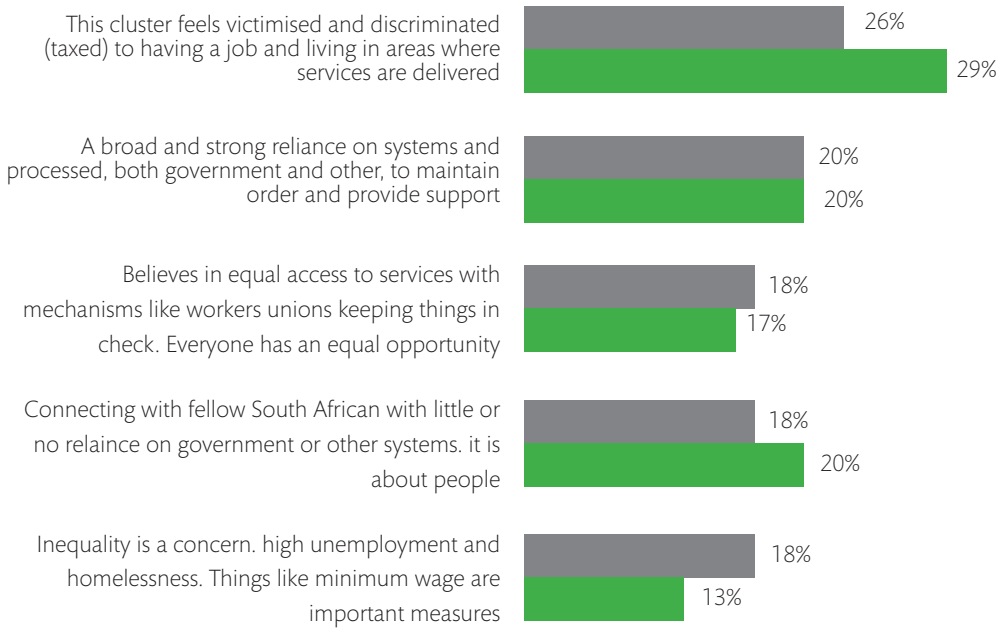


National Pride

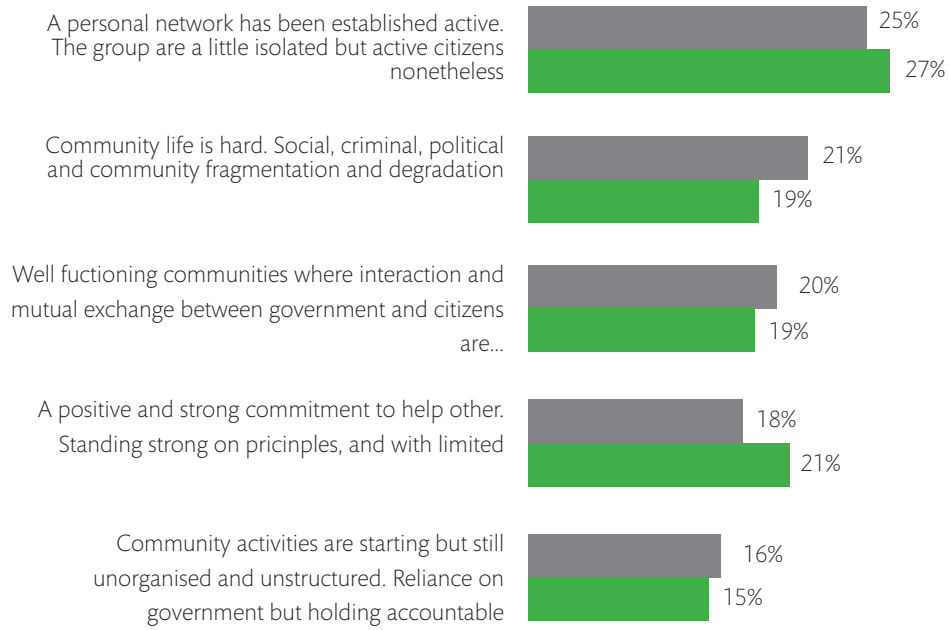


Source: Brand SA: State of the Nation Report 2024

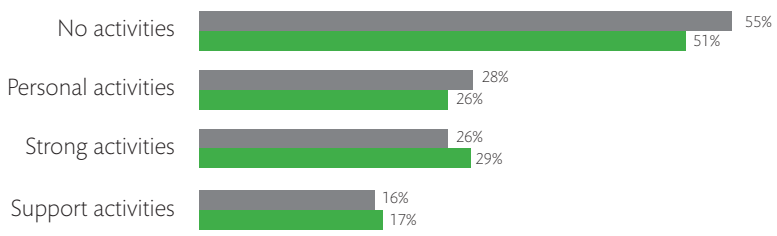
Social Cohesion



Active Citizenship

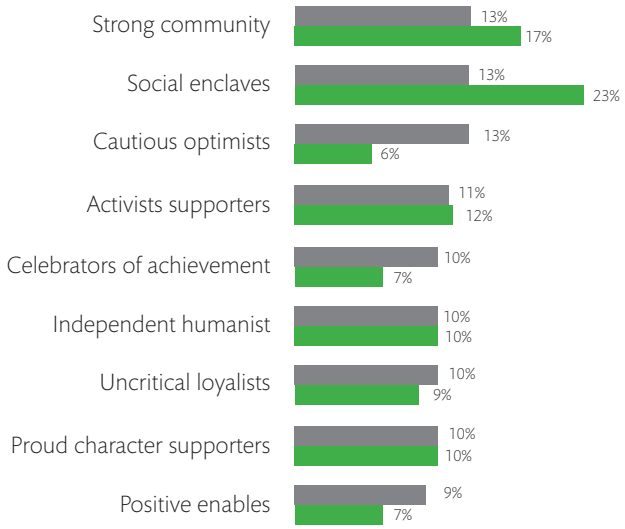


Activity intensity



Source: Brand SA: State of the Nation Report 2024

Behavioural expression comparison



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12.3. Gauteng

The basic demographic profile mimics the national profile well although the average income is 3% below the national average monthly income. This is the most densely populated province with the smallest agricultural sector contribution although most trade activities take place in Gauteng.

All race and language groups are represented in the province but with a slightly higher Black race group and Sotho languages share. It is the province with the greatest urbanisation challenge and therefore a slightly higher unemployment rate.

People watch TV slightly more often per day than the national average and are more connected on social media platforms with an average newspaper readership profile. The province therefore fairly well connected having all kinds of services available.

The perceptions about democracy and democratic principles are well balanced but on the whole, below what the national expectation should be considering the thirty years of democracy milestone.

Although there are fewer incidents of racism and gender discrimination people do not feel closer to one another than a year ago although they interact frequently. Despite the higher-than-average awareness of the GNU, given the high access to communication platforms, the level of confidence in the GNU is relatively low. Similarly, the levels of confidence in the economy are low with much higher levels of crime, low levels of feeling safe and little confidence in the Police to provide support.

Gauteng is therefore characterised as a large metro region with densely populated areas and high levels of scarcity to employment opportunities, services, safety and prosperity. These tension points result in lower levels of identity as seen through the identity clusters. National pride is vague but with anchors on specific activities such as sports with all the sport stadiums in the province, there are always sport activities somewhere.

Social cohesion is characterised by the notion and belief that everyone should have equal access to opportunities. This is not the lived experiences as the other major social cohesion factor is the concern for inequality, high unemployment and homelessness. Therefore, Gauteng, being the economic hub of the country, the business centre, it is here where access to opportunities and inequality are daily experiences and therefore part of reality.

Active citizenship is well developed and strong in the places where it operates. There are many (55%) that do not participate in any activities.

Based on all these factors, the behavioural group cluster that aligns most prominently with Gauteng is Cautious Optimists. Based on the economic, educational, entrepreneurial and market access strengths of the province, it is perhaps not surprising that the cautious optimists promoting South Africa as a place to study, to work, to invest and to do business in as the dominant behavioural expression.

Size of the province	South Africans living in the province (16+)
2.84%	11 981 702

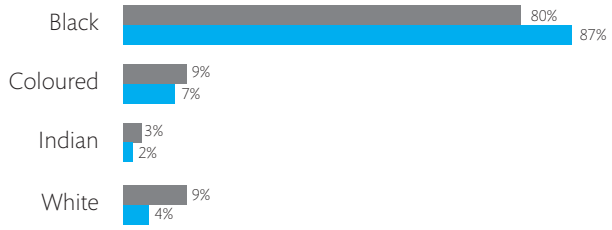
Average number of people in the household:

Provincial	National
3.36	3.51

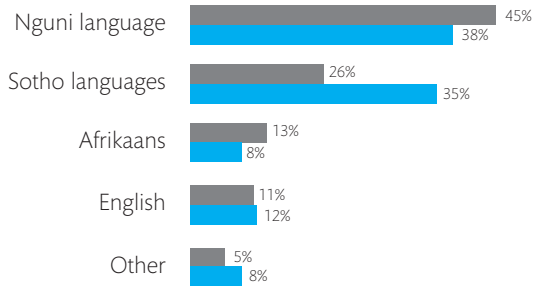
Average Monthly Gross Household income

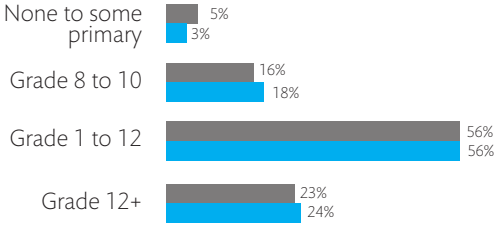
Provincial	National
R13 742	R14 196

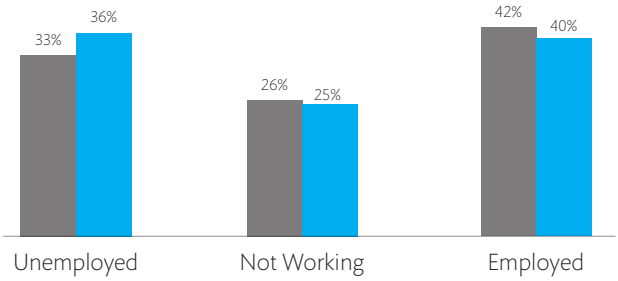
Source: Brand SA: State of the Nation Report 2024



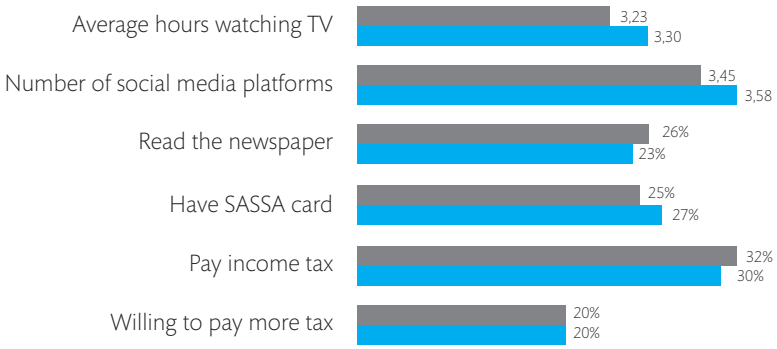
Language, employment, and education profiles.







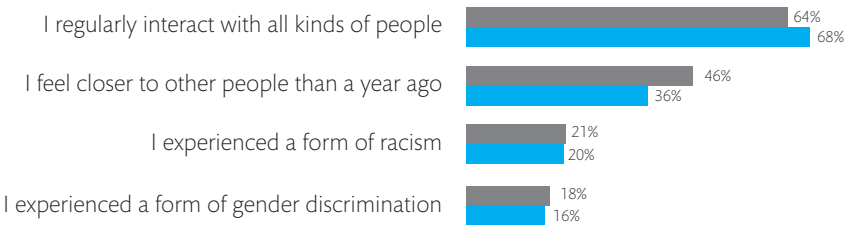
Connectedness and social support.



Views about democracy.

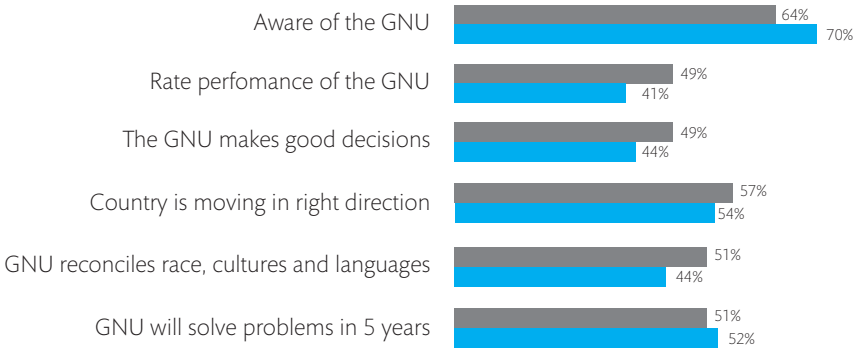
Better off since a democracy	Our democracy is maturing	Satisfied with how democracy works	Expected share of the vote for the ANC
51% | 49%	58% | 59%	48% | 52%	40% | 40%

Social engagements.

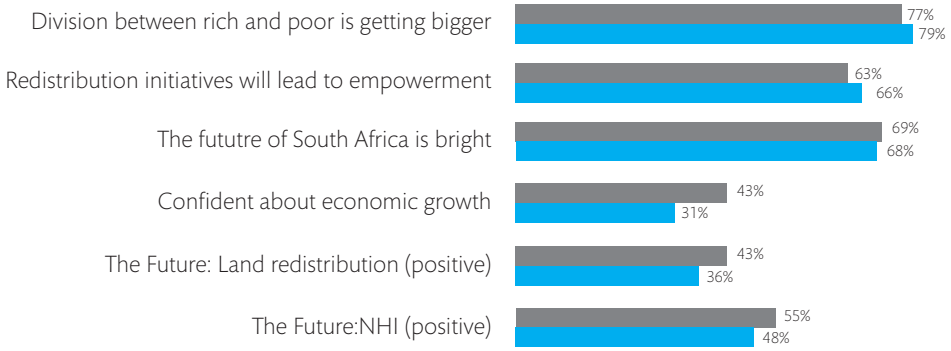


Source: Brand SA: State of the Nation Report 2024

GNU – Government of National Unity



Level of optimism

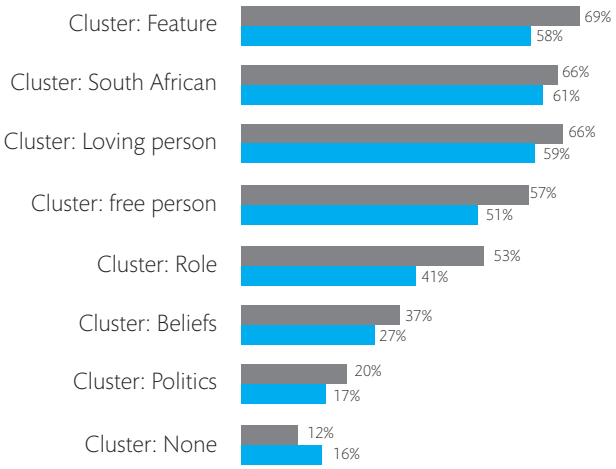


Safety and security

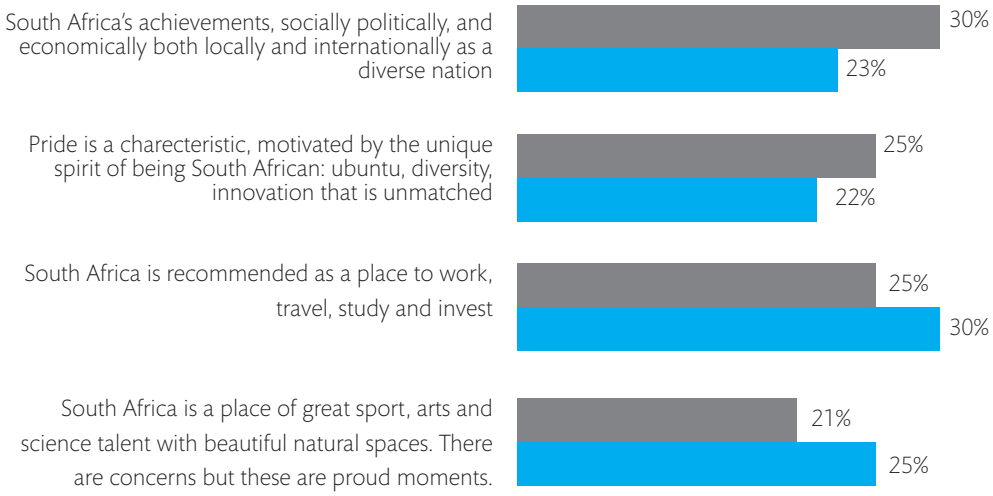
Crime increased since last year	Feel safe in SA	Confident Police will come when I call
56% | 44%	19% | 29%	21% | 52%

Source: Brand SA: State of the Nation Report 2024

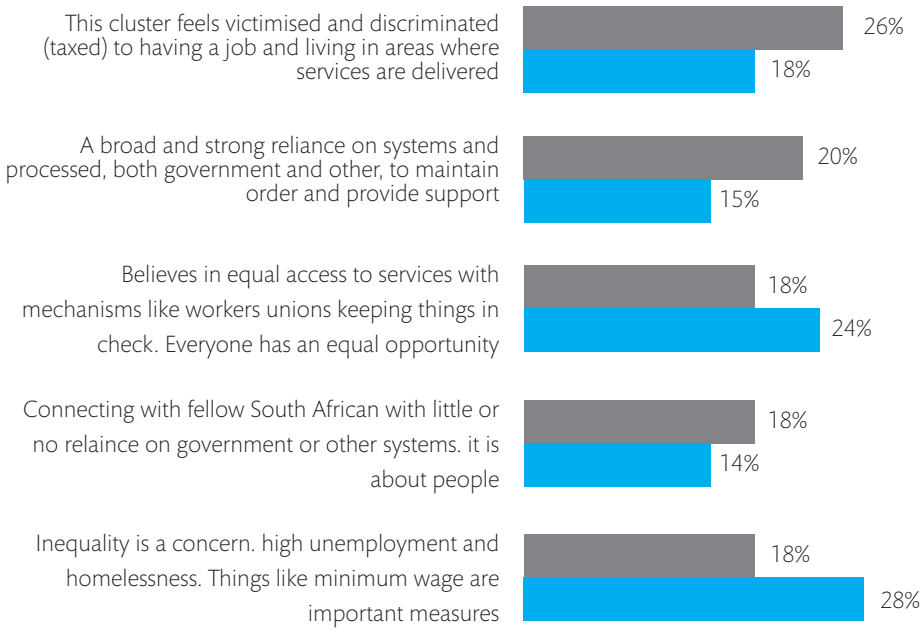
Identity clusters.



National Pride

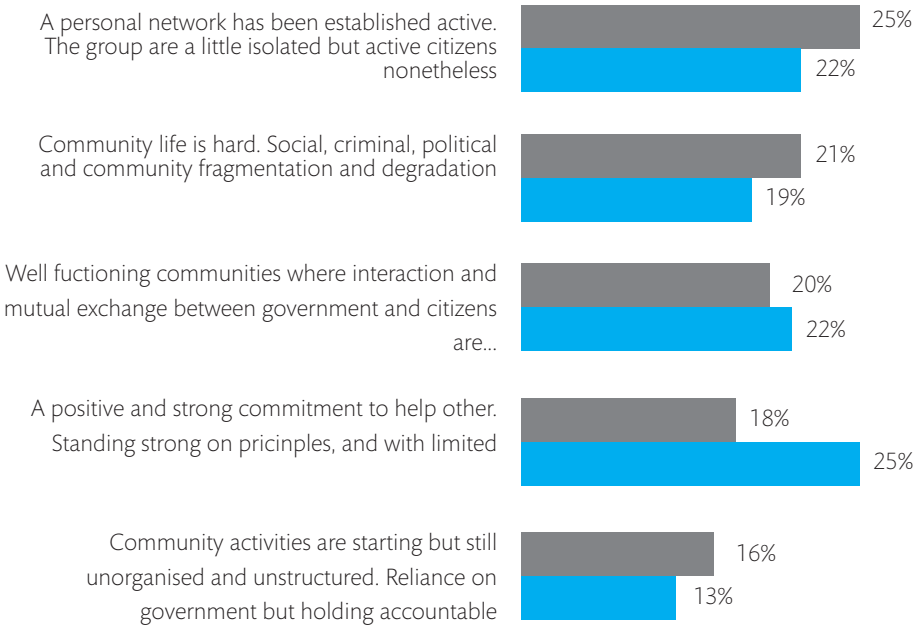


Social Cohesion

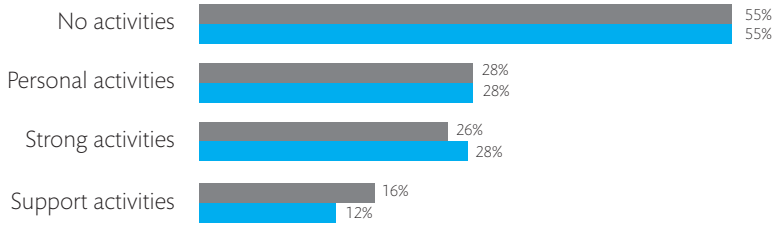


Source: Brand SA: State of the Nation Report 2024

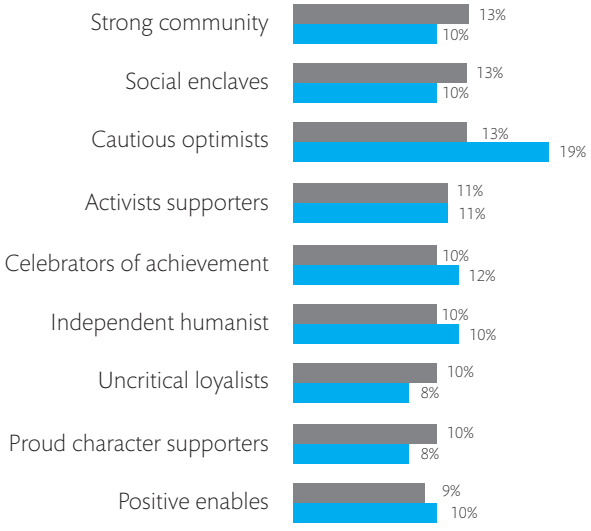
Active Citizenship



Activity intensity



Behavioural expression comparison



Source: Brand SA: State of the Nation Report 2024

12.4. KwaZulu-Natal

The basic demographic profile mimics the national profile well although the average income is 7% below the national average monthly income. KwaZulu-Natal is the second most populated province. It is dominated by the Zulu language group and Black race group. It is a dynamic province with many diverse opinions and perceptions. Despite only 7% below the average income, there are slightly more unemployed in the province than the national average.

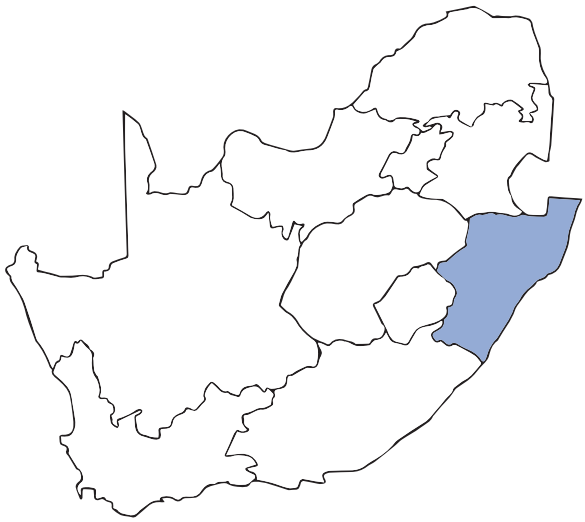
The province is less well connected to social media and other communication networks but follow a more traditional newspaper approach to staying informed. Despite the very disruptive outcome in the national elections in May 2024, the province does not think very differently about democracy and its value although estimated support for the ANC is lowest than any other province.

Different language, race or cultural groups do not interact frequently, but people feel closer together. The strong Zulu culture dominates the province and therefore the above statement makes sense.

There is a lower-than-average awareness of the GNU. Despite that, the levels of confidence in the performance of the GNU are lower than average. With that prospects for a better and brighter future are muted. People in the province do not feel more or less safe than other provinces. With these aspects in mind, the cultural and language anchors of the province are strong and complemented by being South African and being a loving and caring person. These three in combination express a strong historical or heritage anchor where there are activities to support one another as fellow South Africans but seldom outside the familiar community boundaries.

A broad mix of national pride anchors are identified with the understanding that the province has an important economic role in the country. The social cohesion clusters confirm the sense that people are a little cautious and feel victimised for having to pay extra taxes, but there is also a strong bond among people that connects them horizontally, rather than vertically as seen in the Eastern Cape.

People in the province struggle with poor circumstances in communities and fragmented efforts to develop community activities. Many end up doing very little t6o support or help others as community life is hard. Despite these patterns, it is the province with the richest blend of behavioural expressions.



Size of the province

17.9%

South Africans living in the province (16+)

7 570 320

Average number of people in the household:

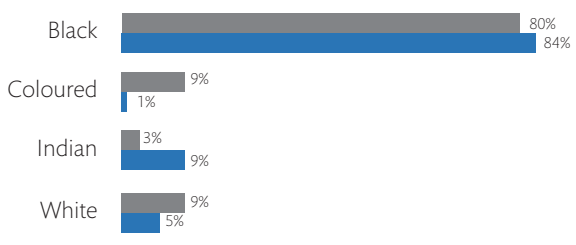
4.09 | **3.51**

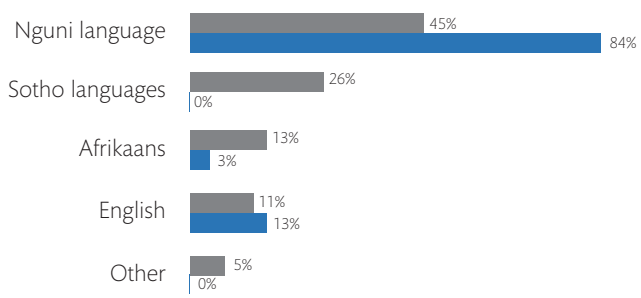
Average Monthly Gross Household income

R13 192 | **R14 196**

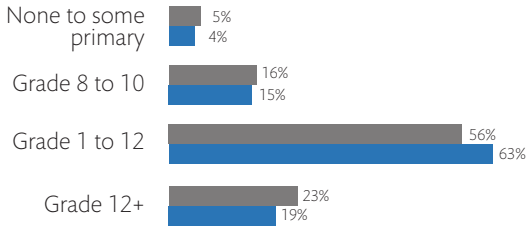
Provincial | National

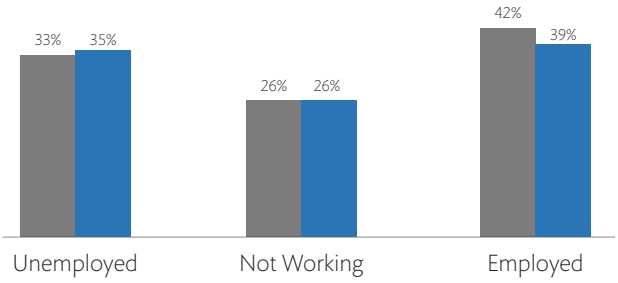
Language, employment, and education profiles.



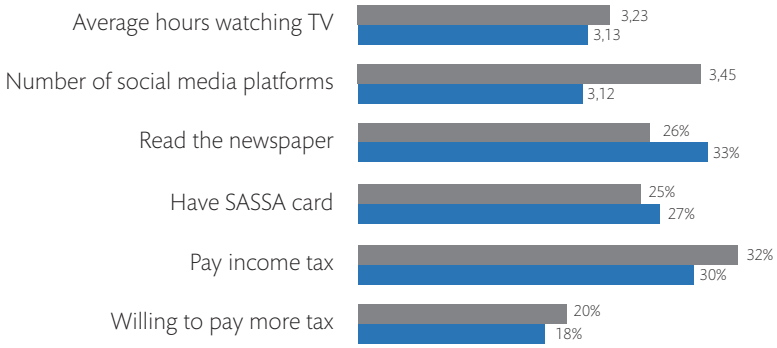


Source: Brand SA: State of the Nation Report 2024





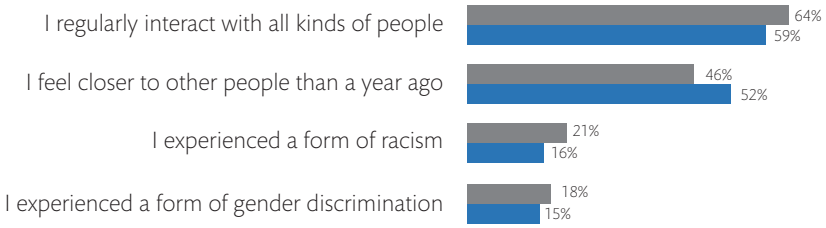
Connectedness and social support.



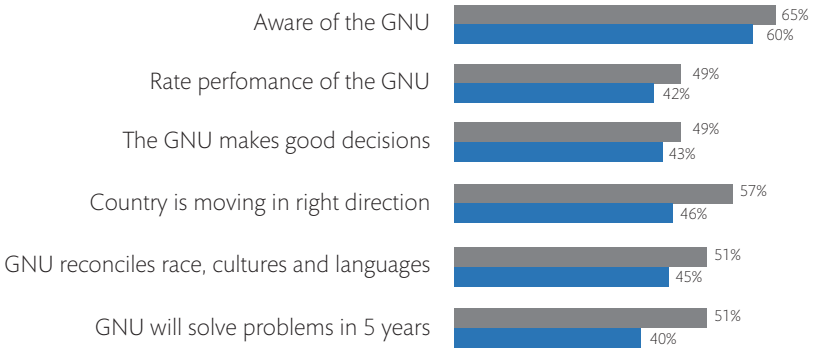
Views about democracy.

Better off since a democracy	Our democracy is maturing	Satisfied with how democracy works	Expected share of the vote for the ANC
51% | 49%	**53%** | 59%	**43%** | 52%	**34%** | 40%

Social engagements.

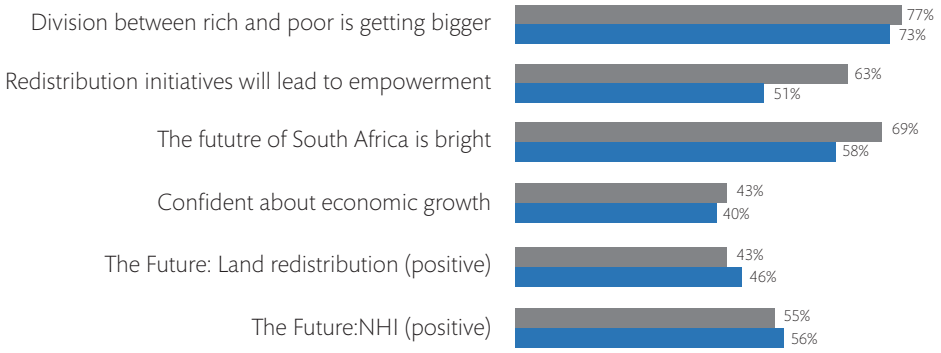


GNU – Government of National Unity



Source: Brand SA: State of the Nation Report 2024

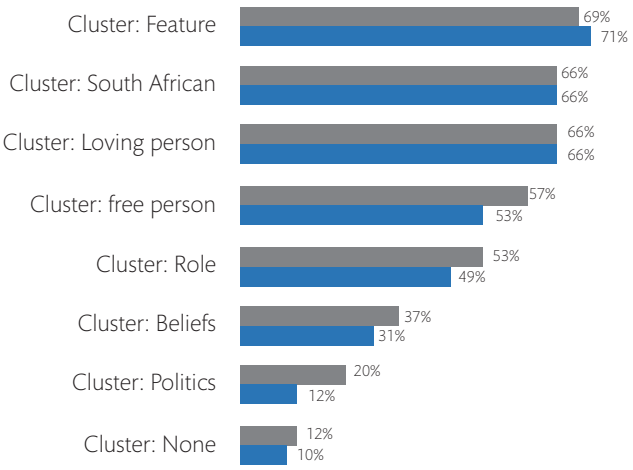
Level of optimism



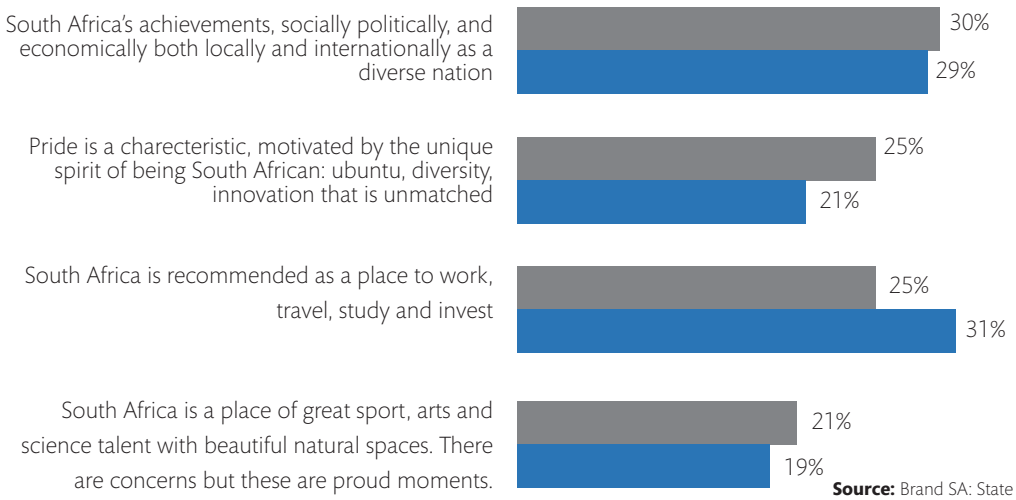
Safety and security

Crime increased since last year	Feel safe in SA	Confident Police will come when I call
42% | 44%	26% | 29%	31% | 52%

Identity clusters.

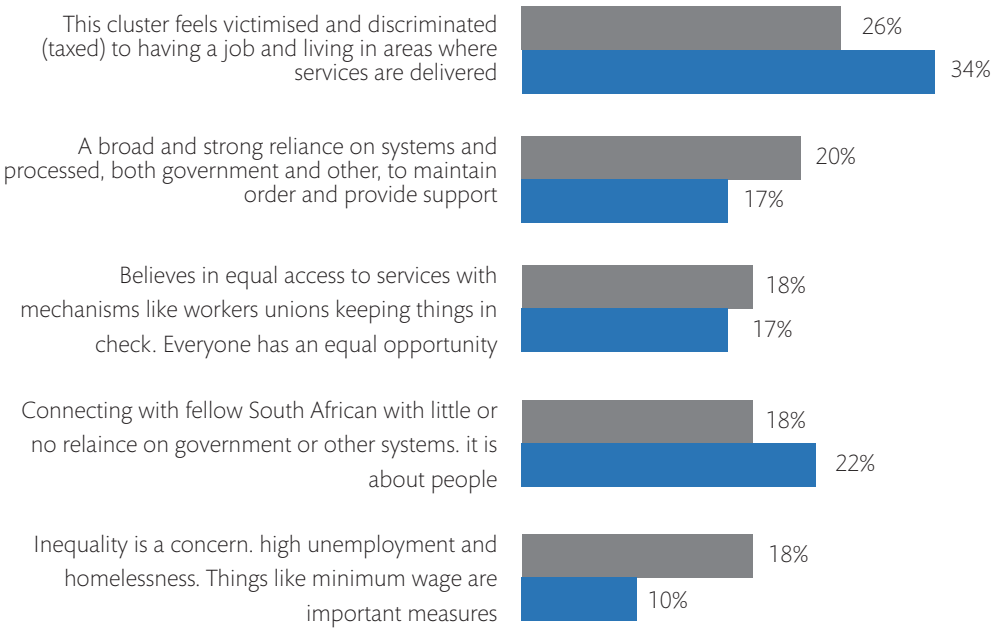


National Pride

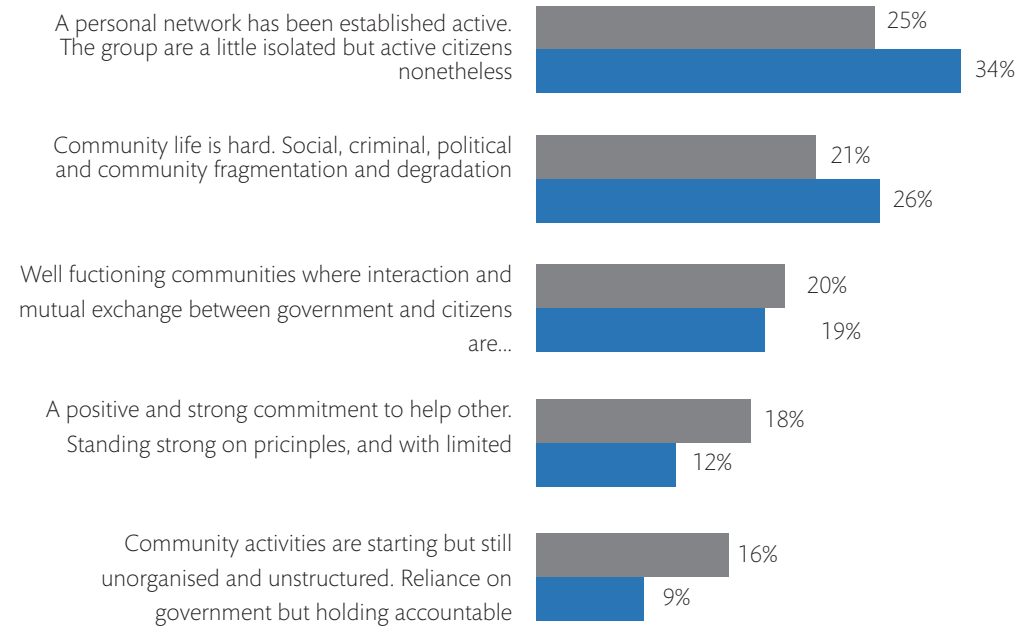


Source: Brand SA: State of the Nation Report 2024

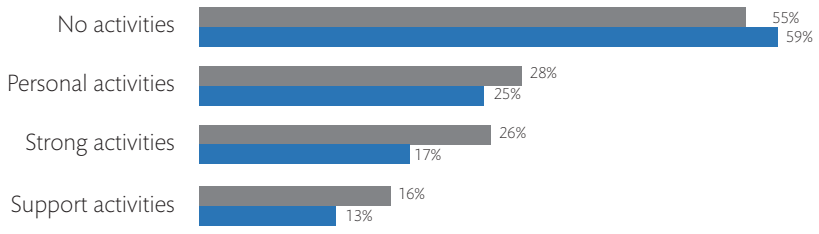
Social Cohesion



Active Citizenship

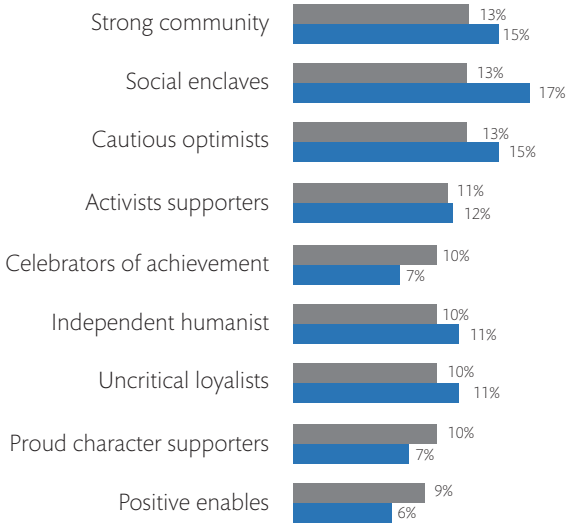


Activity intensity



Source: Brand SA: State of the Nation Report 2024

Behavioural expression comparison



Source: Brand SA: State of the Nation Report 2024

12.5. Limpopo

The basic demographic profile mimics the national profile well although the average income is 25% below the national average monthly income. The province is characterised by high unemployment (46%) and low levels of engagement or participation in national matters. The province is almost exclusively Black speaking Sepedi as the dominant provincial language. SASSA card owners are higher than average and those that pay income tax much lower.

There is great confidence in democracy and that life is much better since democracy. People interact with one another across the board and feel closer to one another than a year ago. There is also great confidence in the GNU. A strong part of the high levels of confidence in the GNU and political system is because President Cyril Ramaphosa comes from Limpopo.

There are concerns about the division between rich and poor but equally there is confidence in the future of South Africa and economic growth. People feel very safe in Limpopo, the province with the highest levels of feeling safe.

With these positive notions, all identity clusters are above average, particularly the cultural, South African and loving or caring characteristics. These sentiments feed into national pride that is mainly based on broad achievements buy the country. This is supported by a strong internalised spirit of being South African.

Social cohesion is interesting as it is supported by both horizontal and vertical social cohesion anchors. The vertical is most likely linked with SASSA and government support, the horizontal is the largely homogeneous nature of the province.

There are limited active citizenship initiatives in the province. The province has the highest level of non-active citizens (67%). Interestingly, in 2017 and 2018, at the height of the Independent Humanists era in the behavioural groups, Limpopo then also had a strong independent humanist's cluster as it does now, with the return of the behavioural group. Celebrators of Achievement, linking with the national pride construct is also an important behavioural expression.

Size of the province

8.8%

South Africans living in the province (16+)

3 729 496

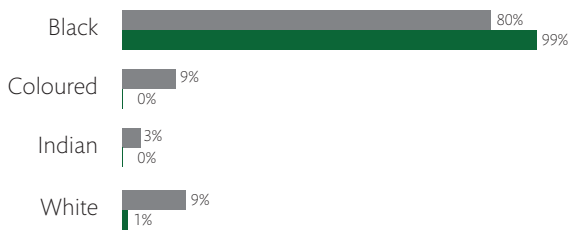
Average number of people in the household:

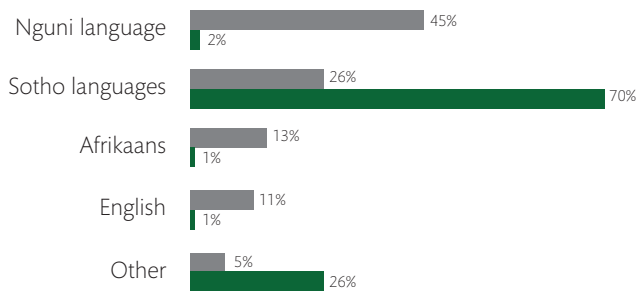
3.93 | **3.51**

Average Monthly Gross Household income

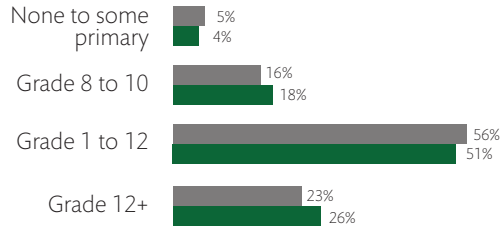
R10 619 Provincial | **R14 196** National

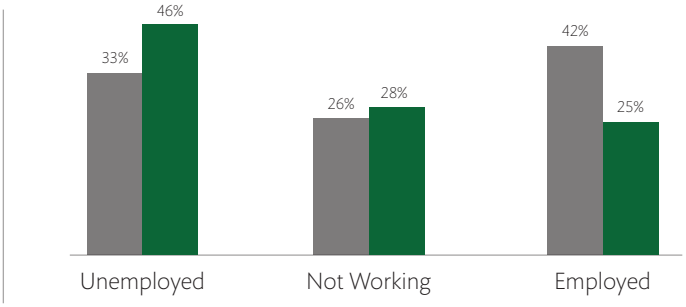
Language, employment, and education profiles.



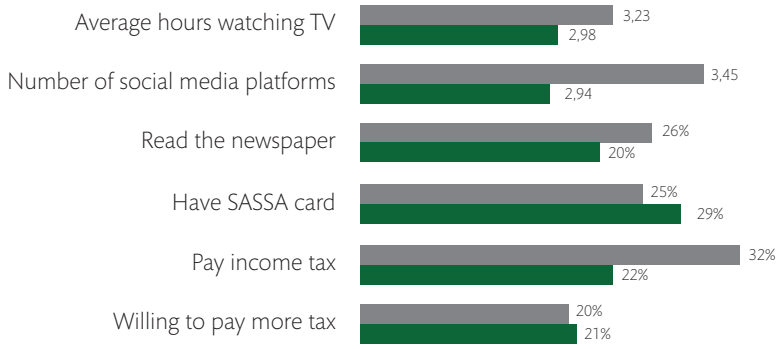


Source: Brand SA: State of the Nation Report 2024





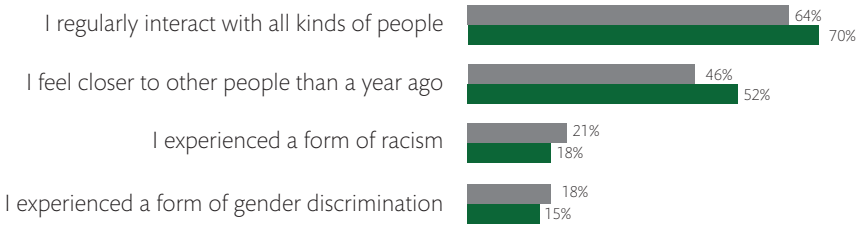
Connectedness and social support.



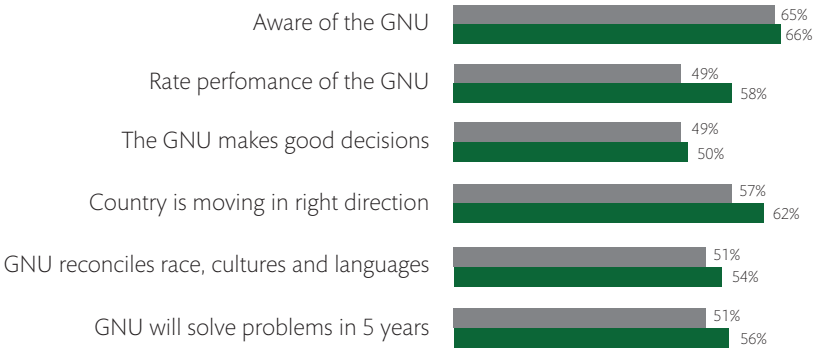
Views about democracy.

Better off since a democracy	Our democracy is maturing	Satisfied with how democracy works	Expected share of the vote for the ANC
58% | 49%	**68%** | 59%	**65%** | 52%	**42%** | 40%

Social engagements.

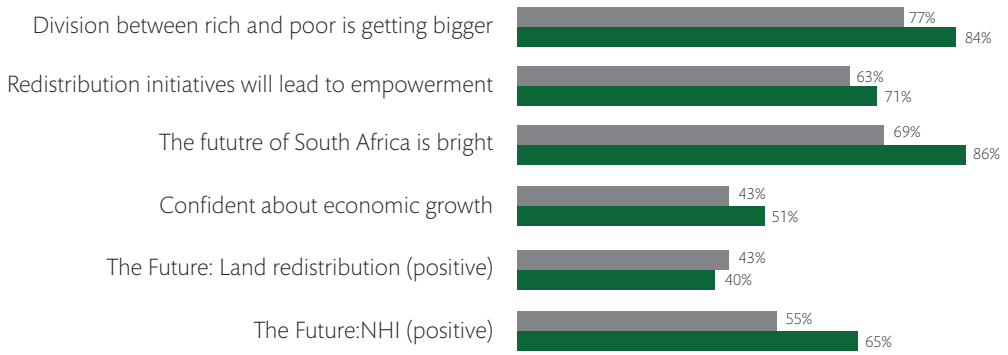


GNU – Government of National Unity



Source: Brand SA: State of the Nation Report 2024

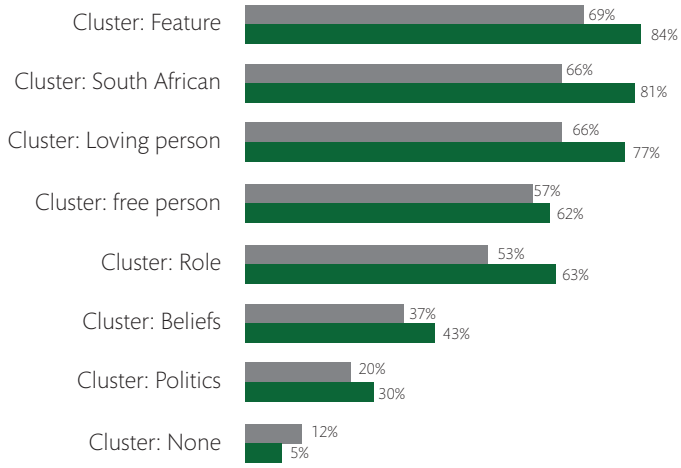
Level of optimism



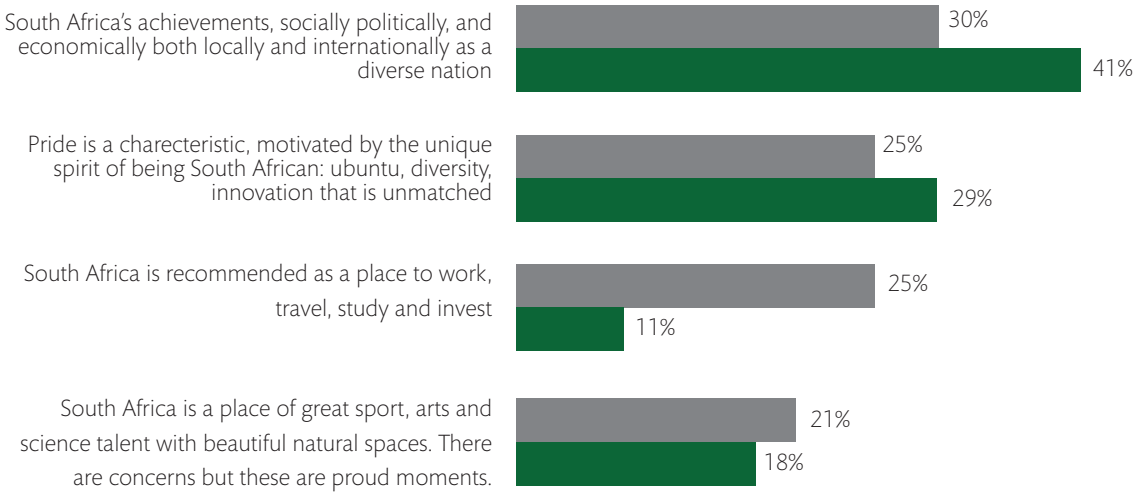
Safety and security

Crime increased since last year	Feel safe in SA	Confident Police will come when I call
36% | 44%	**59%** | 29%	**37%** | 52%

Identity clusters.

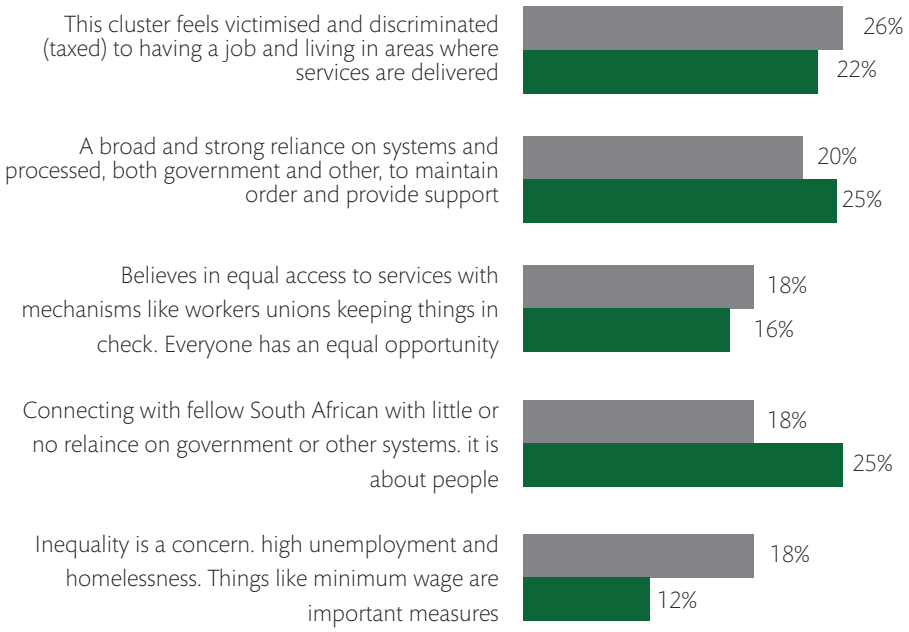


National Pride

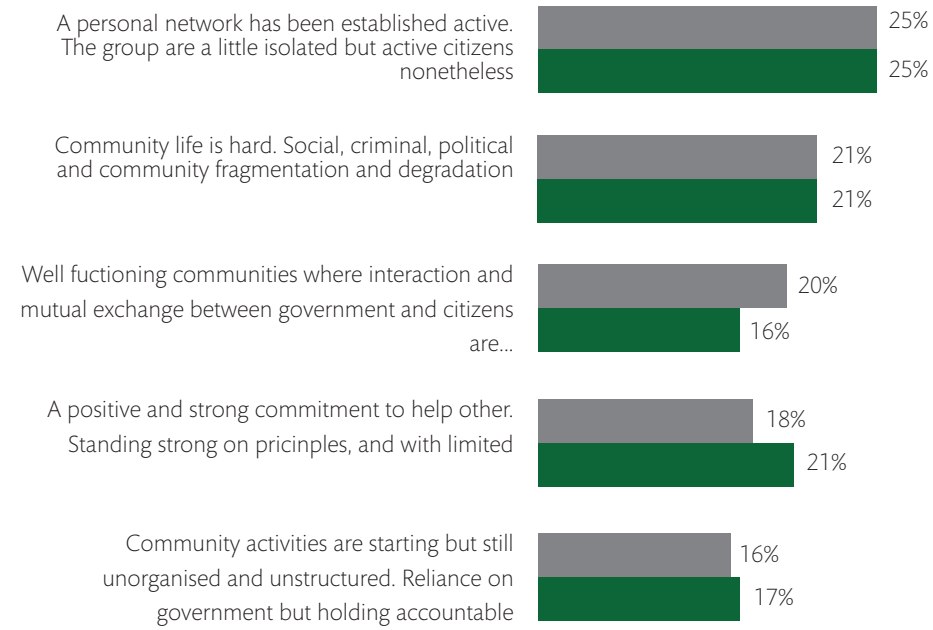


Source: Brand SA: State of the Nation Report 2024

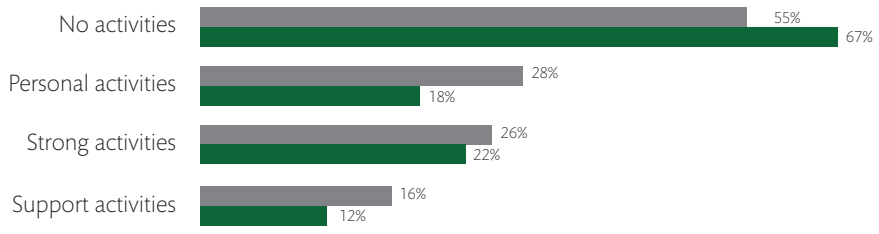
Social Cohesion



Active Citizenship

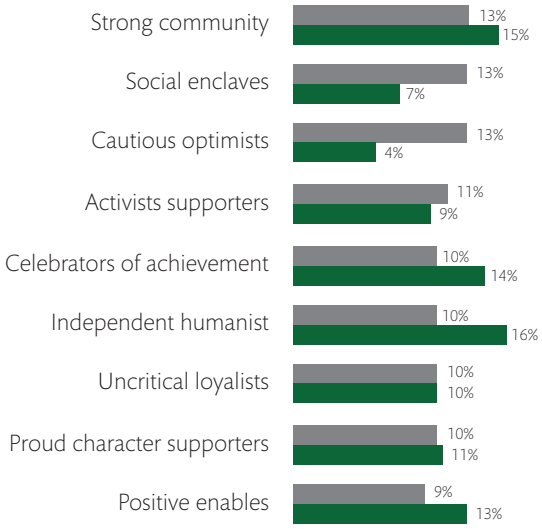


Activity intensity



Source: Brand SA: State of the Nation Report 2024

Behavioural expression comparison



Source: Brand SA: State of the Nation Report 2024

12.4. KwaZulu-Natal

The basic demographic profile mimics the national profile well although the average income is 12% below the national average monthly income. The province is very strongly represented by the Black race group and Nguni (Zulu) language group. Towards the west of the province, closer to Gauteng, the language composition starts to change. There are slightly more than average people unemployed.

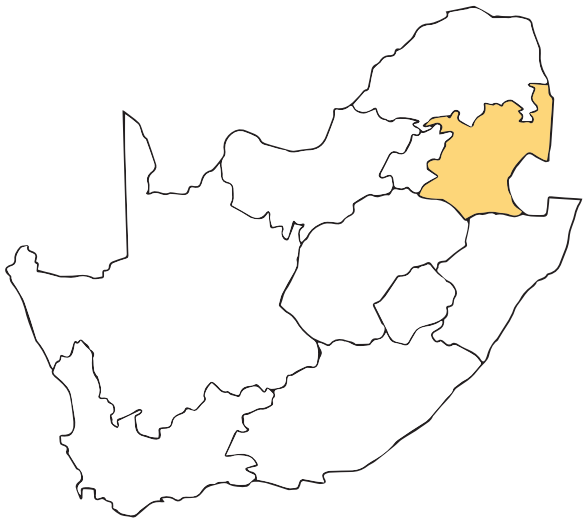
There are correlations with Limpopo and KwaZulu-Natal in terms of the dynamics, but Mpumalanga has a higher sense of uncertainty and vulnerability. The province is not engaged in terms of watching TV or reading the newspaper and has a lower tax base. There are on par levels of confidence in the democratic system. Although people feel closer to one another than a year ago, there are also more reports of racism and gender discrimination.

Despite these attributes coupled with a lower level of awareness about the GNU, there is a level of hope in the performance of the GNU and that the GNU will solve problems in the next 5 years. The province is aware of the divisions between rich and poor but believes in the future of South Africa and that the economy will grow. Land redistribution will lead to real empowerment.

Crime is not much lower than the average and people generally do not feel safe, as in the rest of the country. Despite the similarities with particular Limpopo, Mpumalanga is much less confident as a province and the identity clusters support that. Almost all identity clusters are below average.

National pride is based on a broad mix of associations. Social cohesion is mainly vertical with a high number of people being concerned about inequality and homelessness. There are functioning communities which is a dominant part of the active citizenship mindset coupled with fairly new developments in active citizenship, even though the activities are strong.

The behavioural expressions are mainly driven by achievements and uncritical loyalists (vertical cohesion).



Size of the province

7.7%

South Africans living in the province (16+)

3 256 351

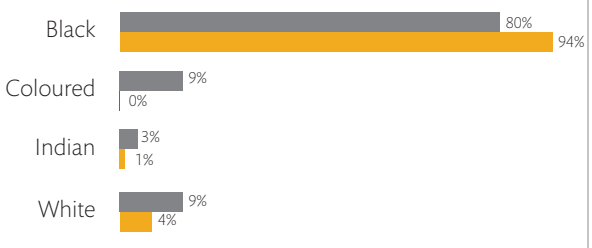
Average number of people in the household:

3.62 | **3.51**

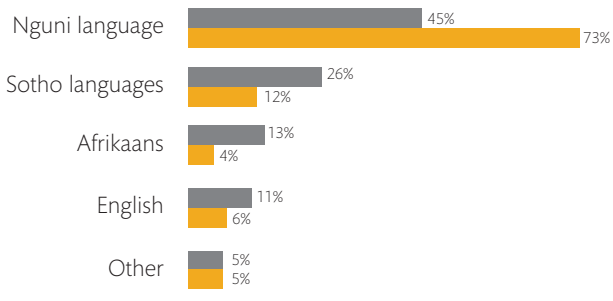
Average Monthly Gross Household income

R12 511 | **R14 196**

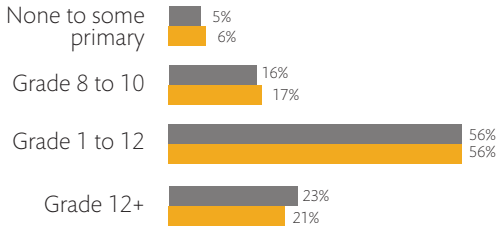
Provincial | National

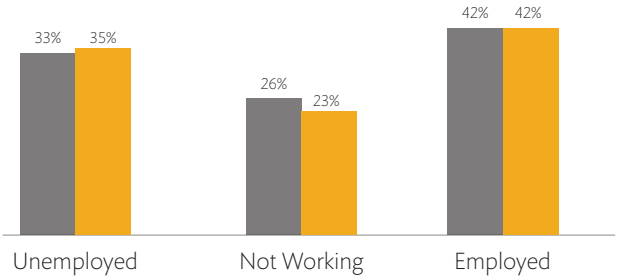


Language, employment, and education profiles.

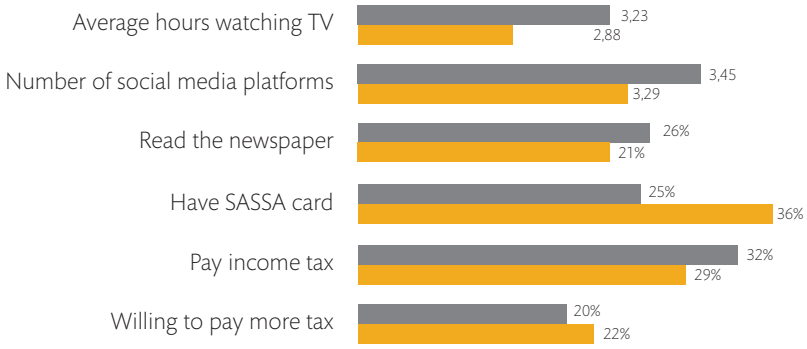


Source: Brand SA: State of the Nation Report 2024





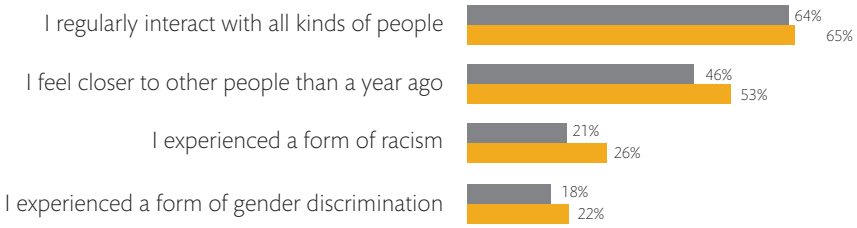
Connectedness and social support.



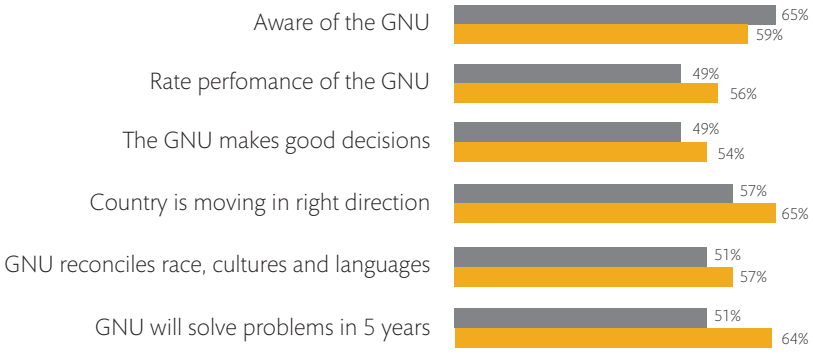
Views about democracy.

Better off since a democracy	Our democracy is maturing	Satisfied with how democracy works	Expected share of the vote for the ANC
44% | 49%	58% | 59%	54% | 52%	38% | 40%

Social engagements.

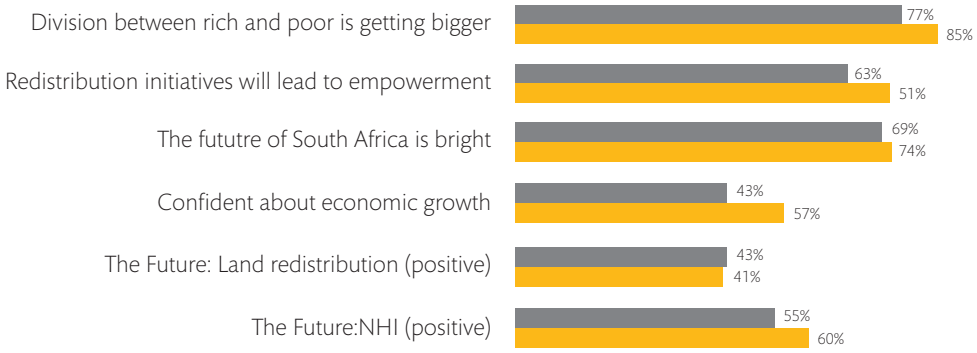


GNU – Government of National Unity



Source: Brand SA: State of the Nation Report 2024

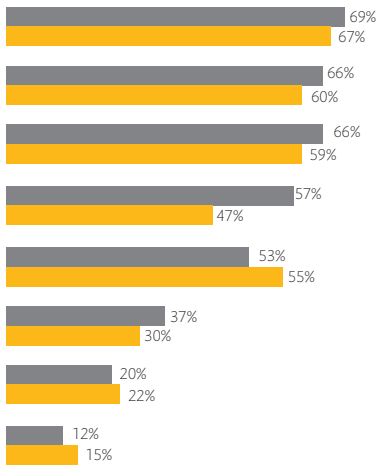
Level of optimism



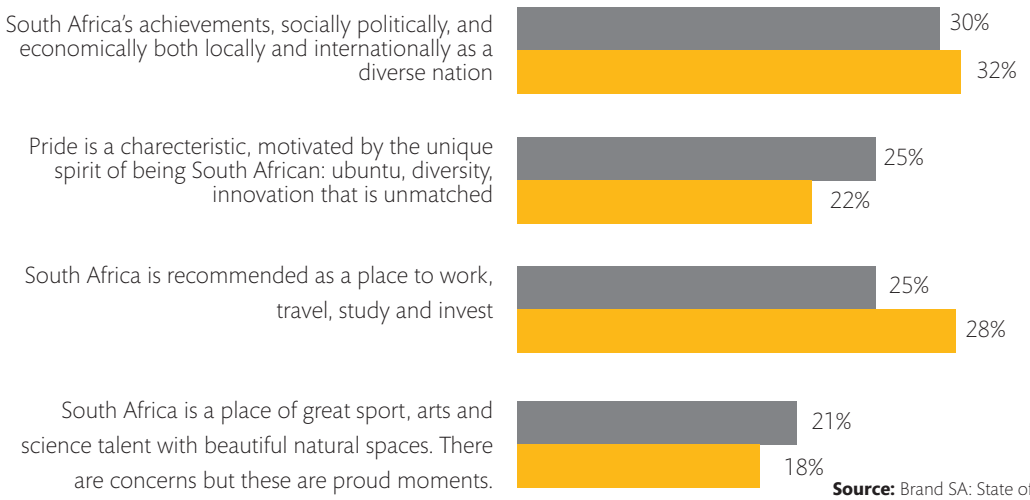
Safety and security

Crime increased since last year	Feel safe in SA	Confident Police will come when I call
36% | 44%	30% | 29%	48% | 52%

Identity clusters.

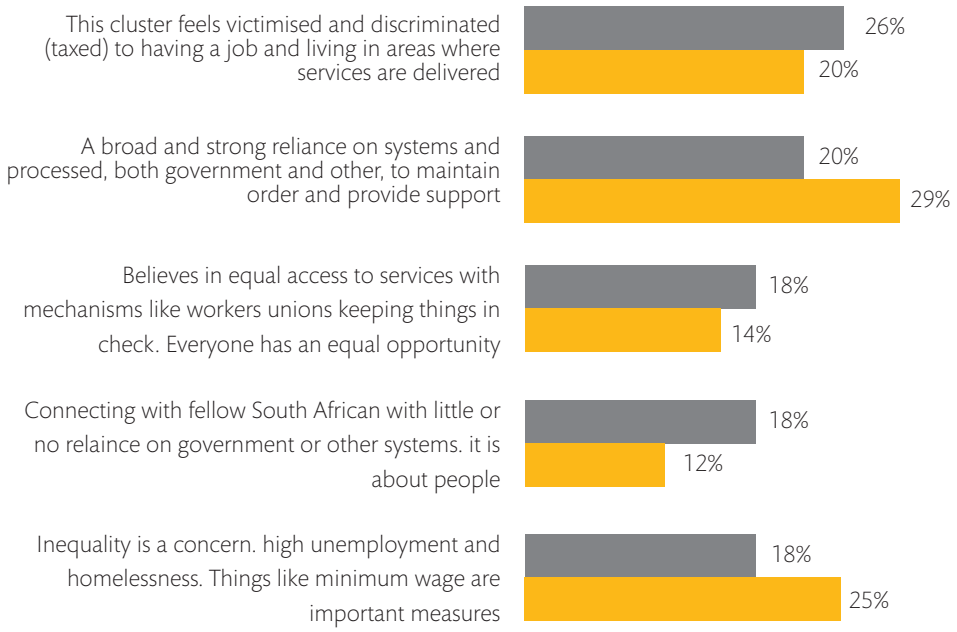


National Pride

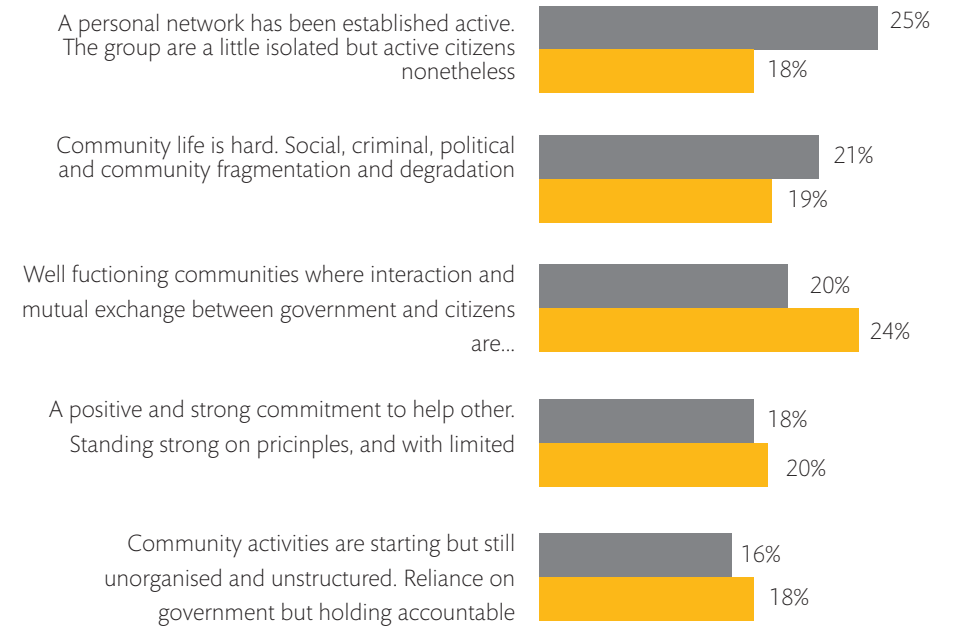


Source: Brand SA: State of the Nation Report 2024

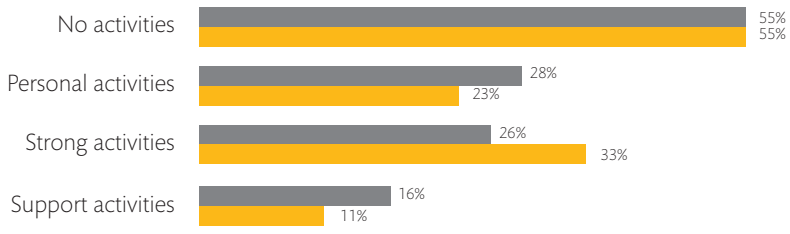
Social Cohesion



Active Citizenship

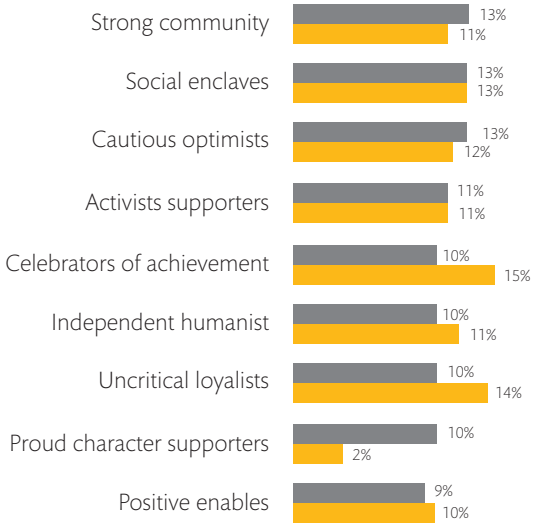


Activity intensity



Source: Brand SA: State of the Nation Report 2024

Behavioural expression comparison



Source: Brand SA: State of the Nation Report 2024

12.7. Northwest

Of the three provinces Limpopo, Northwest and Mpumalanga, Northwest is the poorest province. The basic demographic profile mimics the national profile well although the average income is 29% below the national average monthly income. Limpopo and Northwest share a sense of optimism that Mpumalanga does not have.

Northwest is largely Tswana speaking (Western Sotho) but with a mix of almost all other languages in small pockets. Very little connectedness and engagement but with a sense of optimism about democracy and democratic processes. People in the province engage with one another frequently and there seems to be a much less contentiousness than noted in Mpumalanga. There is high awareness of the GNU and great optimism about the work of the GNU and the impact it will have on the country. These notions are supported by economic optimism in growth and empowerment.

Levels of crime are average, and people feel slightly safer in Northwest than elsewhere in the country.

Given these circumstances, people in Northwest have a strong sense of identity, particularly as a loving and caring person. The character identifiers are particularly noted in the province. From a national pride point of view, it is the achievements of South Africa both nationally and internationally as well as a sense of internalised pride that motivates the sentiment. As a result, social cohesion is stronger horizontally and people help one another through active citizenship initiatives, even if on a small scale.

A mix of behavioural group clusters are identified with in the Northwest province with Celebrators or Achievement, Strong Community Networks, Positive Enablers and Uncritical Loyalists being the more prominent four.

Size of the province

6.8%

South Africans living in the province (16+)

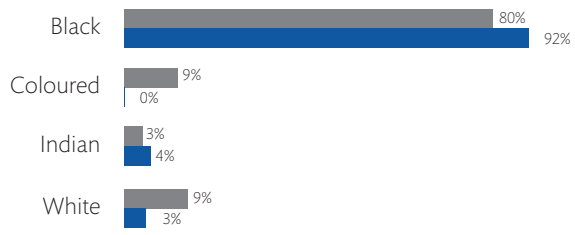
2 866 702

Average number of people in the household:

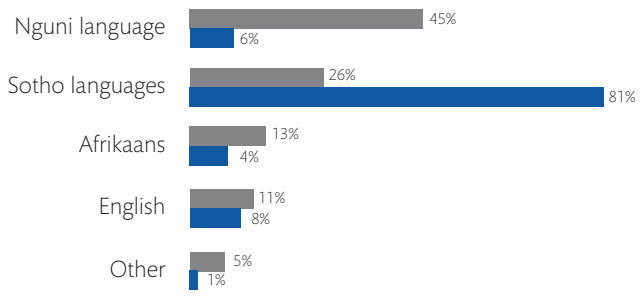
3.57 | **3.51**

Average Monthly Gross Household income

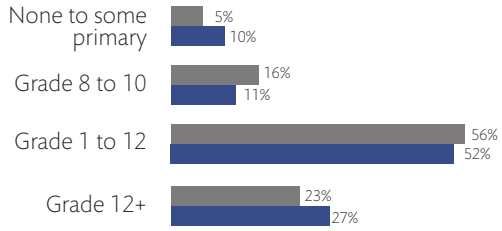
R10 067 (Provincial) | **R14 196** (National)

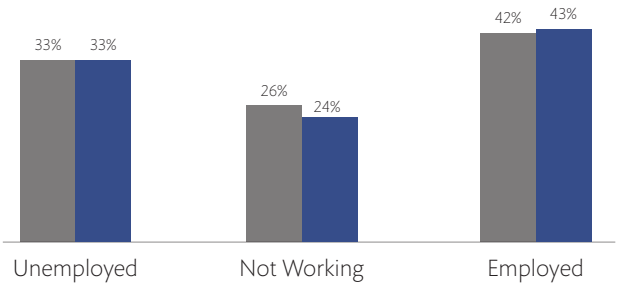


Language, employment, and education profiles.

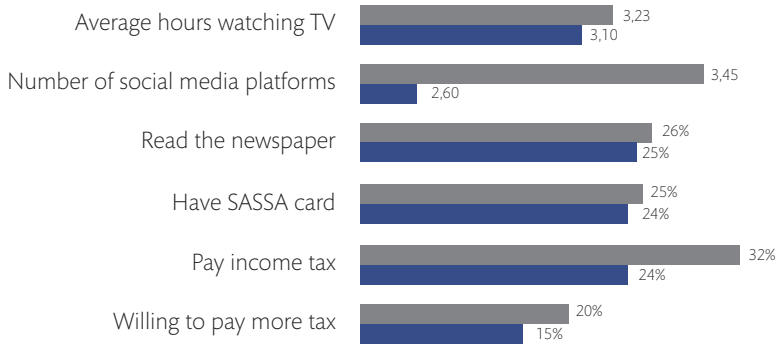


Source: Brand SA: State of the Nation Report 2024





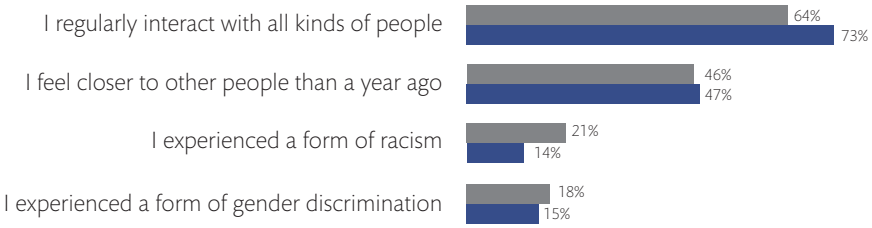
Connectedness and social support.



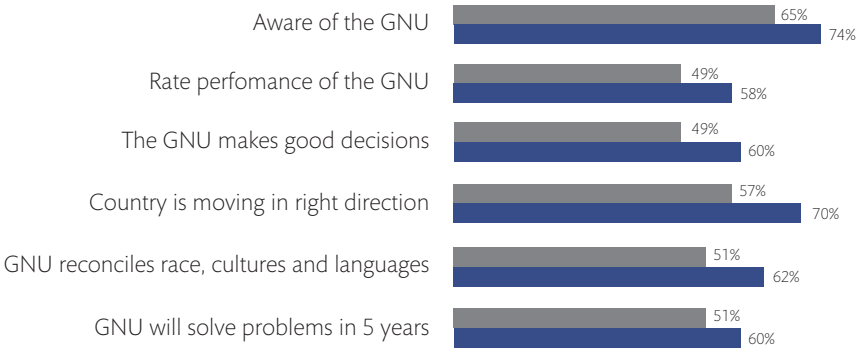
Views about democracy.

Better off since a democracy	Our democracy is maturing	Satisfied with how democracy works	Expected share of the vote for the ANC
67% | 49%	**65%** | 59%	**61%** | 52%	**42%** | 40%

Social engagements.

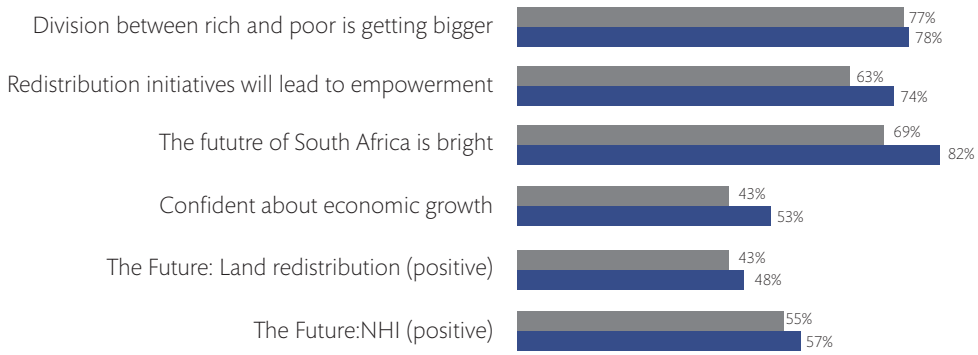


GNU – Government of National Unity



Source: Brand SA: State of the Nation Report 2024

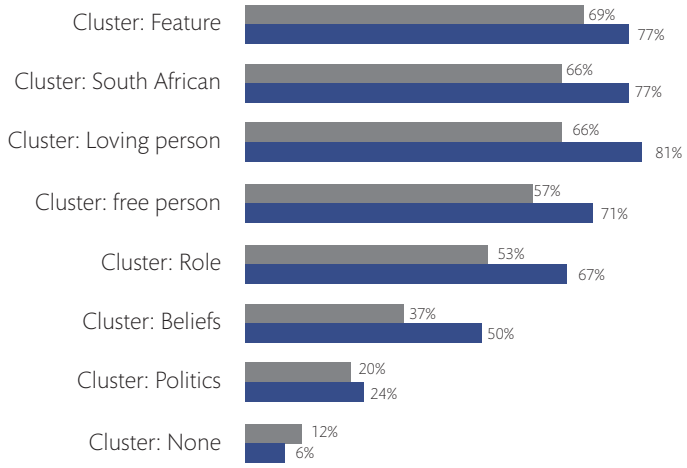
Level of optimism



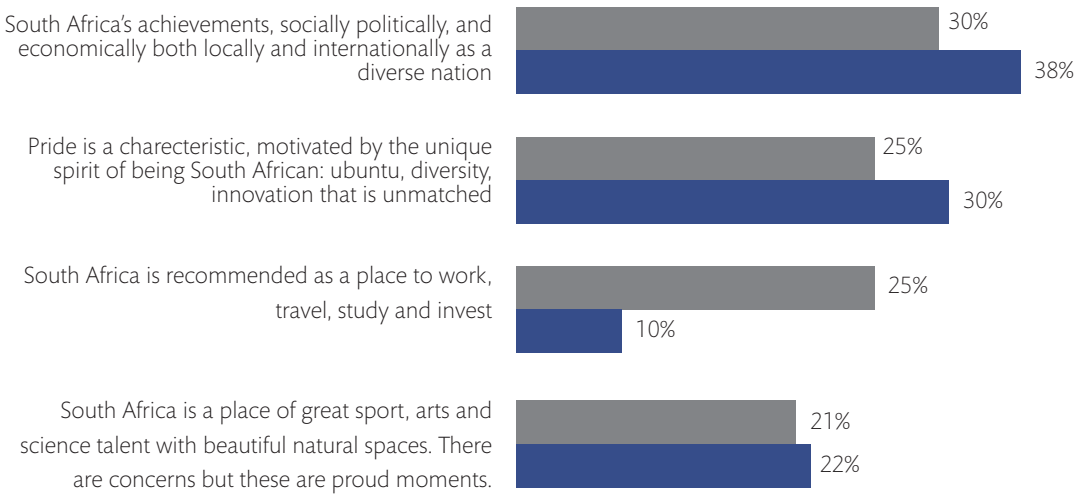
Safety and security

Crime increased since last year	Feel safe in SA	Confident Police will come when I call
44% | 44%	36% | 29%	38% | 52%

Identity clusters.

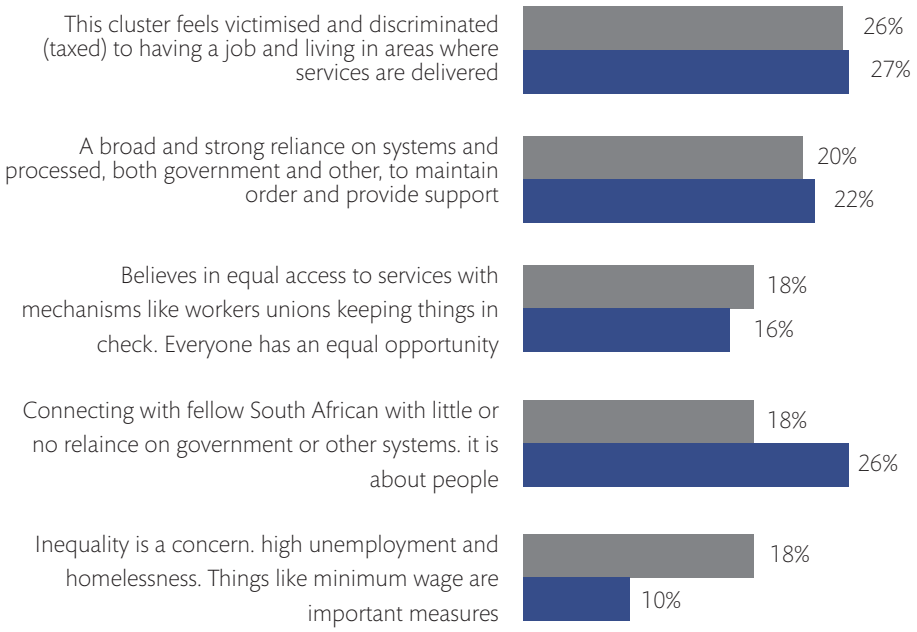


National Pride

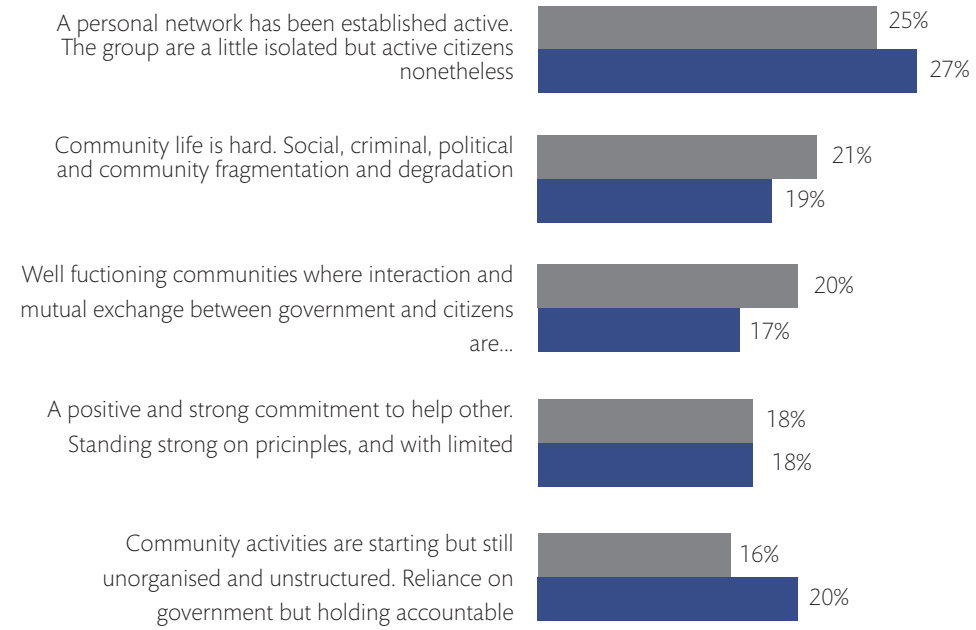


Source: Brand SA: State of the Nation Report 2024

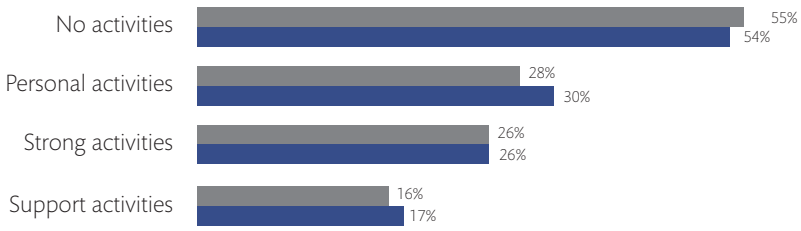
Social Cohesion



Active Citizenship

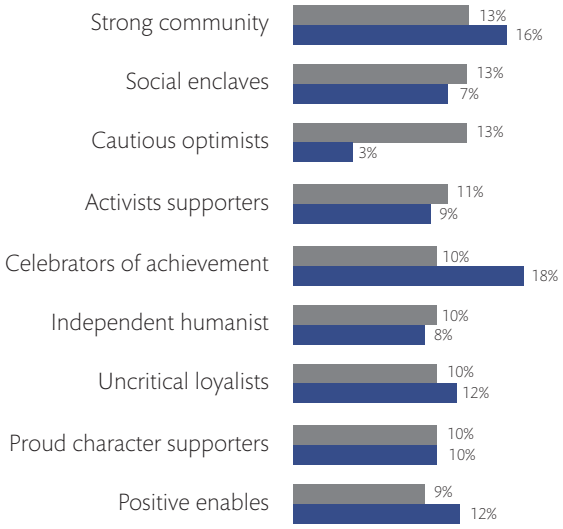


Activity intensity



Source: Brand SA: State of the Nation Report 2024

Behavioural expression comparison



12.8. Northern Cape

The province that is least densely populated has a mix of race groups, particularly Coloured, Black, and White. The Black languages are mostly Sesotho and Tswana. The basic demographic profile mimics the national profile well although the average income is 15% below the national average monthly income.

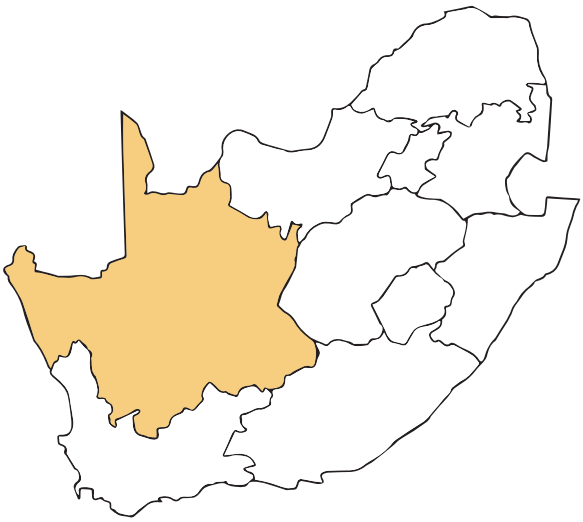
The province has a slightly better education profile than the national average and unemployment is slightly lower. In this province, the newspaper is the most common source of information, and many people rely on SASSA to cover household expenditures.

The province is less confident than what it seems. There are concerns about the value of democracy. People do not interact frequently and there are clear indicators of racism and gender discrimination. These two aspects, together with the lack of employment opportunities create a similar sense of the environment as Mpumalanga has.

There are lower levels of awareness of the GNU and with that very little confidence in what it can do. The province has a negative outlook on life with little expectations. The province is least confident in the GNU to bring together race, culture, and language groups. There are concerns about the division between rich and poor but little confidence in the economic growth strategies and empowerment initiatives. People feel very safe in the province.

Given these dynamics, there are very few anchors the province identifies with from an identity perspective. The province has the highest "No identity" association.

National pride is largely cantered around a vague association that it is a good place to travel, invest, and live in. There is almost no association with sport or other achievements. From a social cohesion point of view, there is a sense of feeling victimized. Active citizenship is based on engagement with one another. The sentiment is that if those living in the province do not support one another, then things will go bad, however, few indicators



Size of the province

2.1%

South Africans living in the province (16+)

890 626

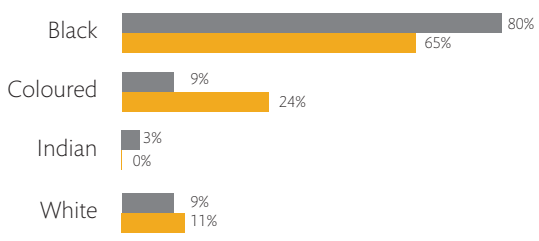
Average number of people in the household:

3.21 | **3.51**

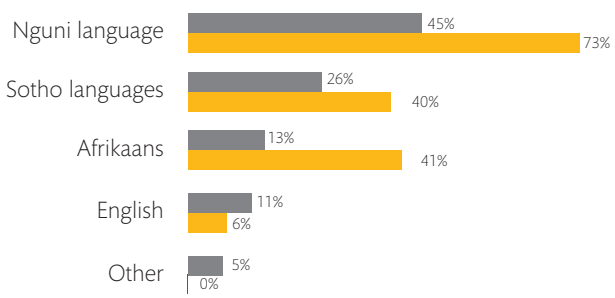
Average Monthly Gross Household income

R12 046 | **R14 196**

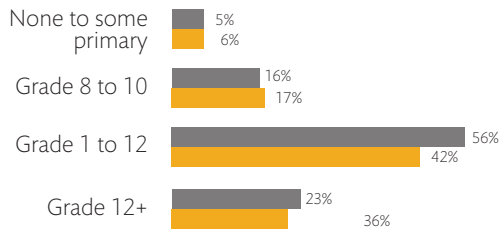
Provincial | **National**

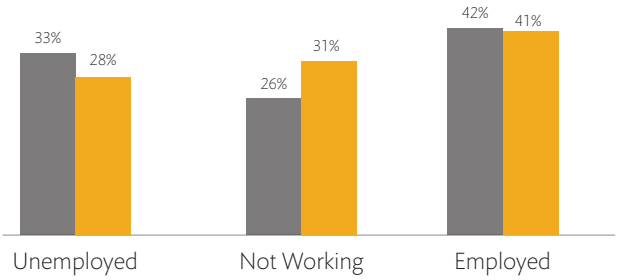


Language, employment, and education profiles.

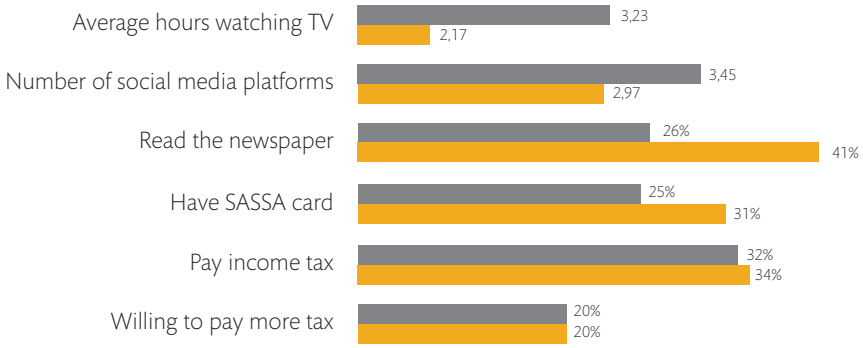


Source: Brand SA: State of the Nation Report 2024





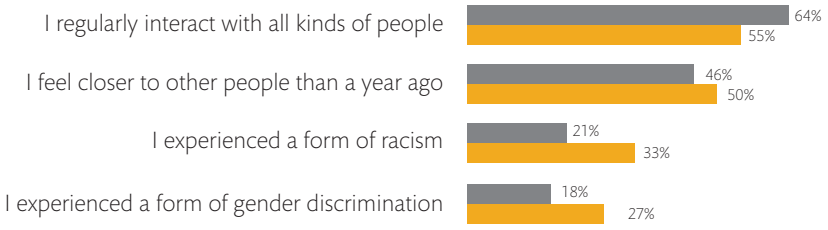
Connectedness and social support.



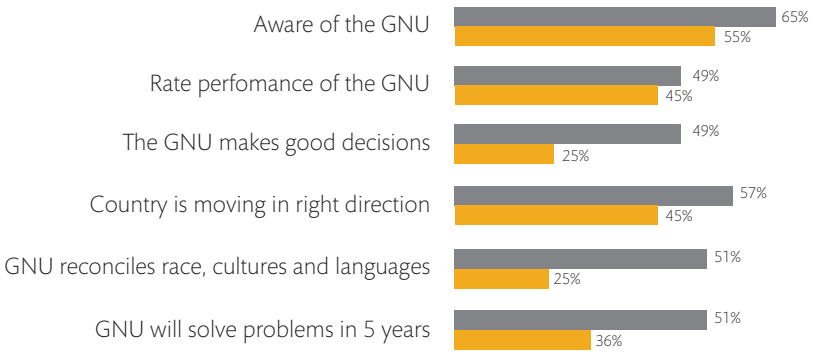
Views about democracy.

Better off since a democracy	Our democracy is maturing	Satisfied with how democracy works	Expected share of the vote for the ANC
44% | 49%	43% | 59%	45% | 52%	36% | 40%

Social engagements.

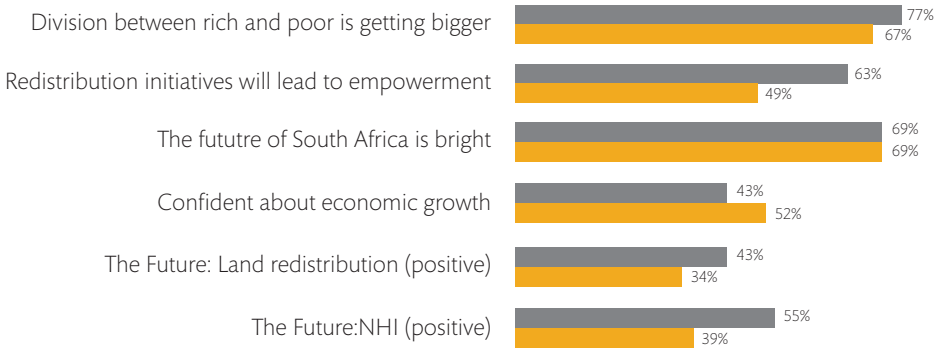


GNU – Government of National Unity



Source: Brand SA: State of the Nation Report 2024

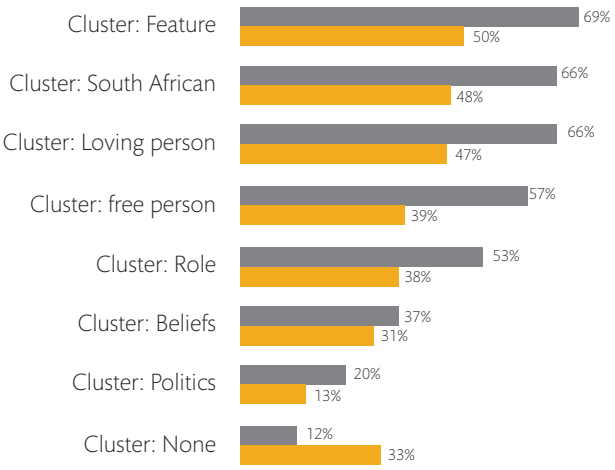
Level of optimism



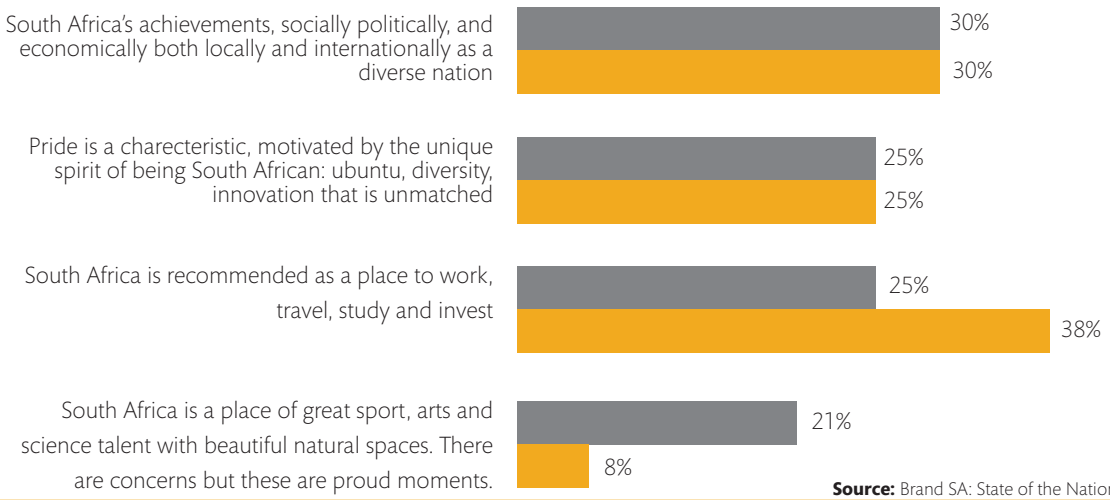
Safety and security

Crime increased since last year	Feel safe in SA	Confident Police will come when I call
29% | 44%	42% | 29%	28% | 52%

Identity clusters.

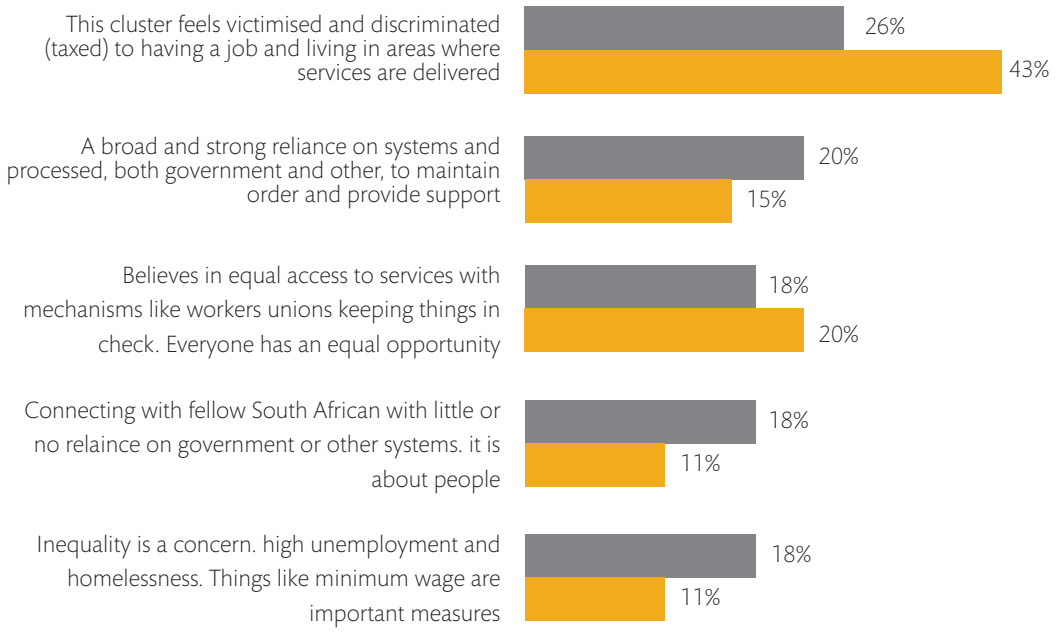


National Pride

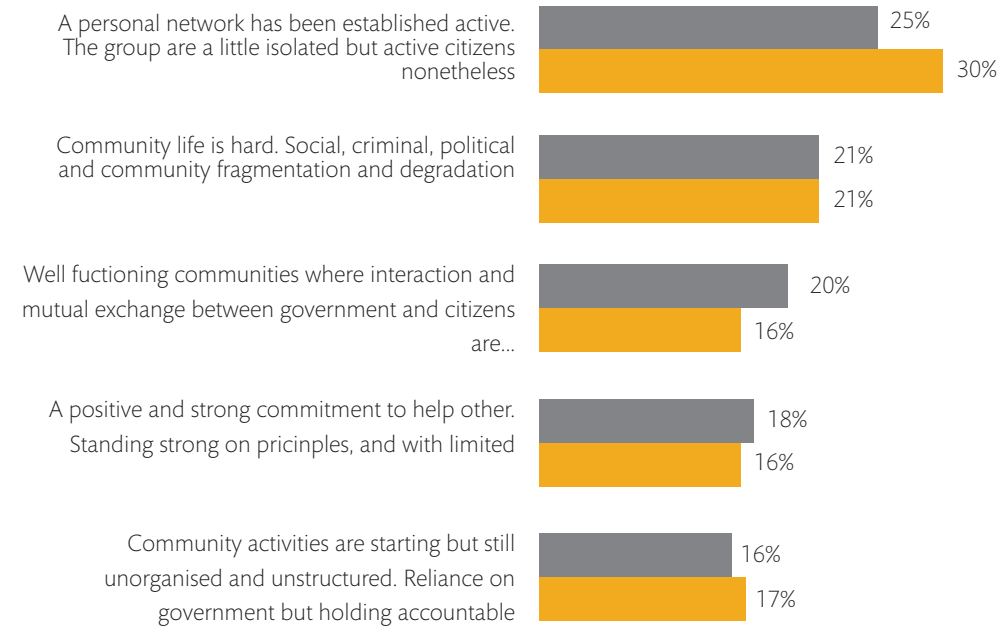


Source: Brand SA: State of the Nation Report 2024

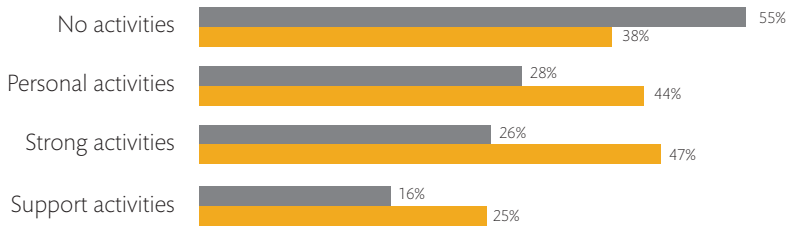
Social Cohesion



Active Citizenship

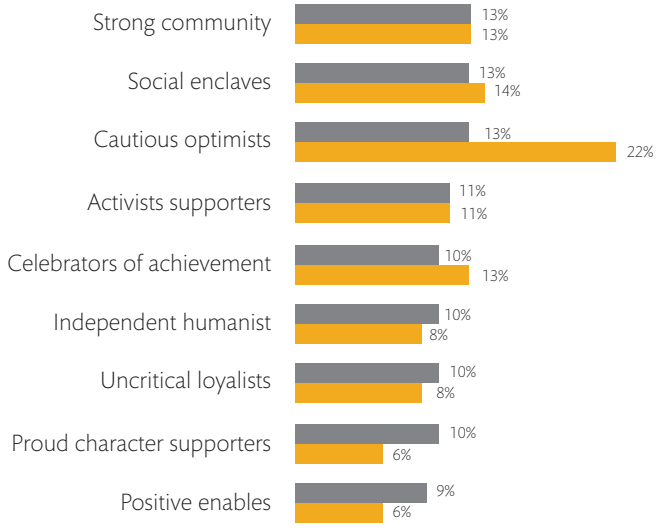


Activity intensity



Source: Brand SA: State of the Nation Report 2024

Behavioural expression comparison



12.9. Western Cape

Lastly, the Western Cape is the most affluent province. It is the third largest province in terms of population size with the lowest representation of the Black race group and dominated by the Coloured race group. As a result, the dominant language is Afrikaans. The basic demographic profile mimics the national profile well although the average income is 76% above the national average monthly income. The levels of education are higher than average and this is the province with the highest level of employed people.

Communication platform, engagement is high across TV, social media platforms, and newspapers. The province also contributes most to the tax base.

Despite these positive trends, there is a lower level of confidence in democratic systems and processes. People frequently engage with one another but there are also high levels of racism and gender discrimination recorded.

There is confidence in the GNU but not much more so than the average. Despite that, the levels of confidence in the economy are lower. People feel much more unsafe compared to the rest of the nation.

There is strong identity cluster support, particularly being a South African and a Free person. National pride is a combination of achievements and a deep sense of the spirit of being South African. From a social cohesion point of view, the province feels victimized for having to support so many people and government processes through taxes but also having a strong horizontal cohesion where people connect with one another.

Active citizenship is characterized by functioning communities where there is good collaboration between the community structures and ward councillors or other government entities. There are some that are associated with communities in which life is hard with criminal activities. The province has a high proportion of activity-strength associations despite the impression that community's function well.

From a behavioural group association, Strong Community Networks. Social Enclaves and Activist Supporters are key associations in the province.

Size of the province

12.6%

South Africans living in the province (16+)

5 315 923

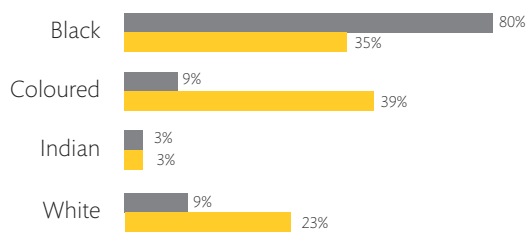
Average number of people in the household:

3.24 | **3.51**

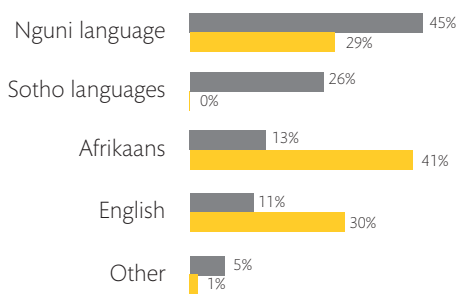
Average Monthly Gross Household income

R24 960 | **R14 196**

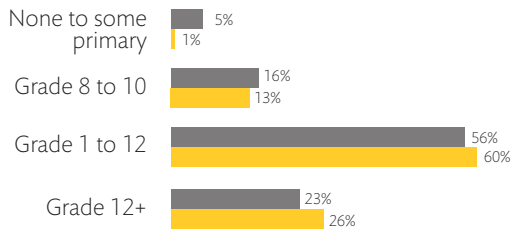
Provincial | **National**

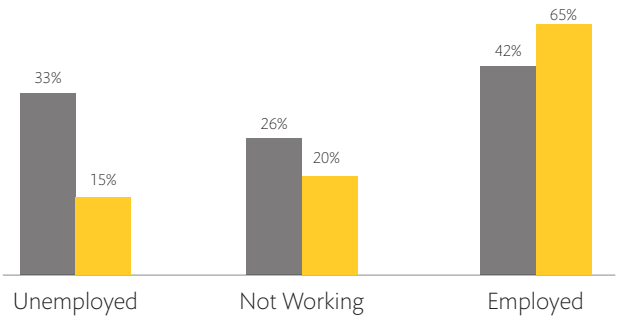


Language, employment, and education profiles.

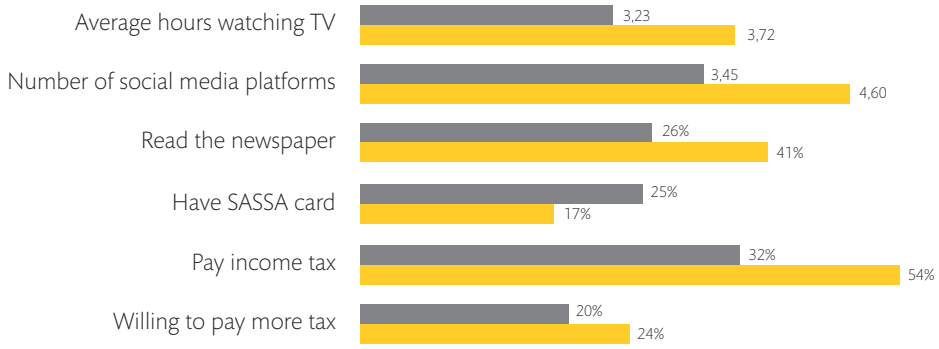


Source: Brand SA: State of the Nation Report 2024





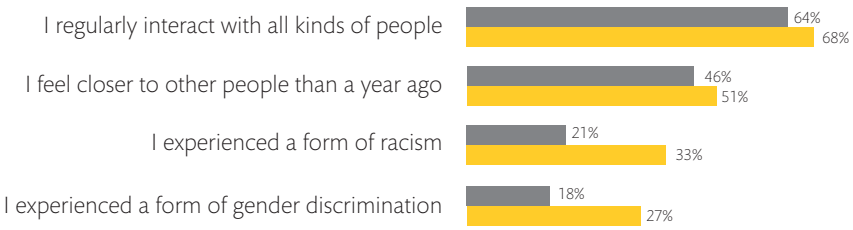
Connectedness and social support.



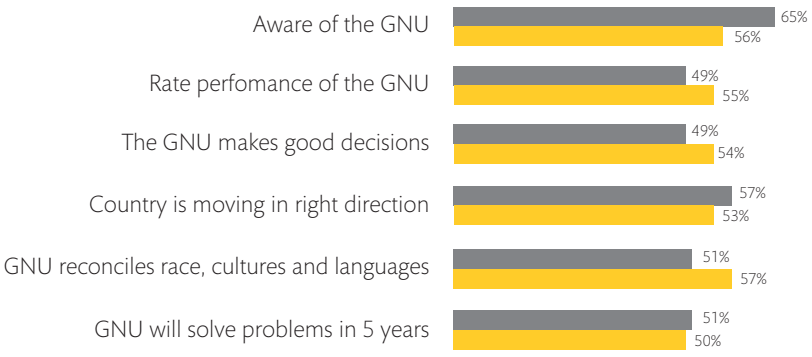
Views about democracy.

Better off since a democracy	Our democracy is maturing	Satisfied with how democracy works	Expected share of the vote for the ANC
42% | 49%	61% | 59%	51% | 52%	45% | 40%

Social engagements.

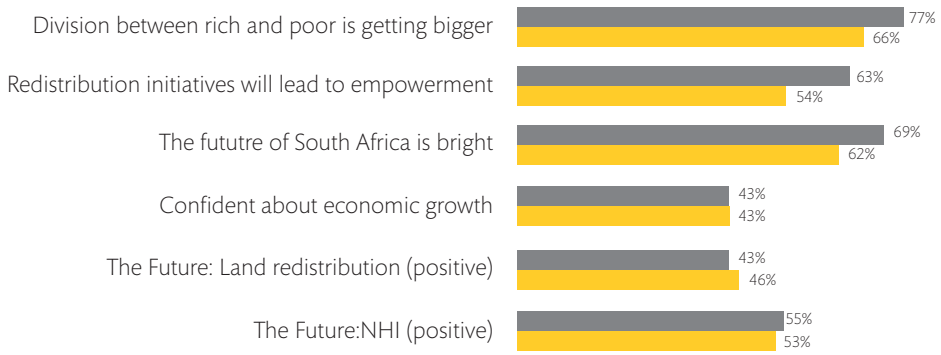


GNU – Government of National Unity



Source: Brand SA: State of the Nation Report 2024

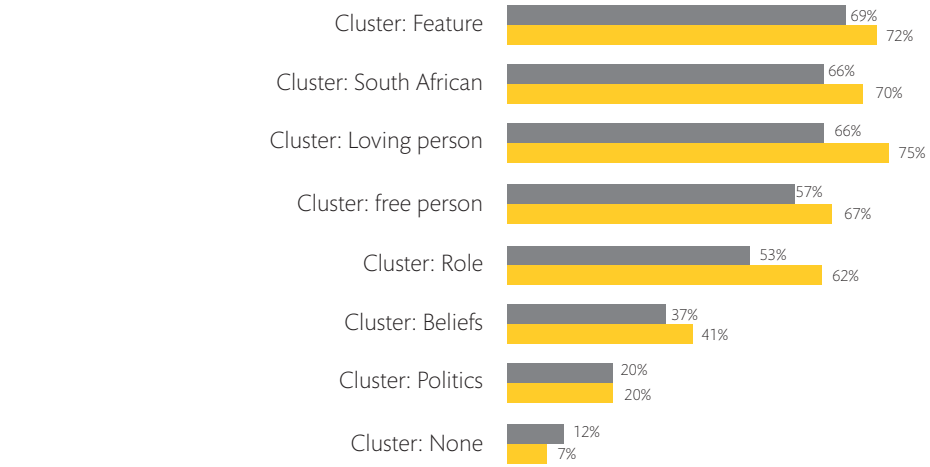
Level of optimism



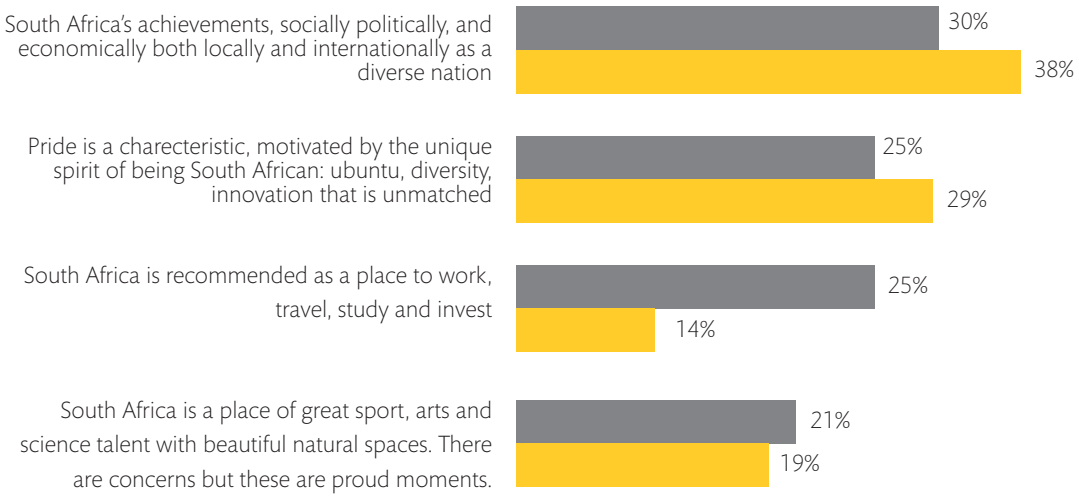
Safety and security

Crime increased since last year	Feel safe in SA	Confident Police will come when I call
33% | 44%	22% | 29%	37% | 52%

Identity clusters.

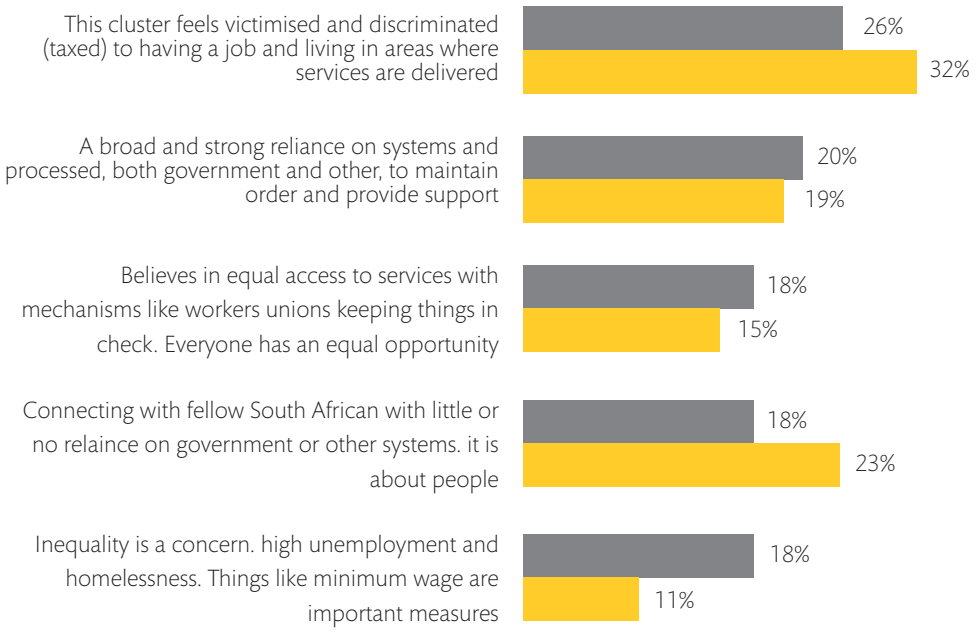


National Pride

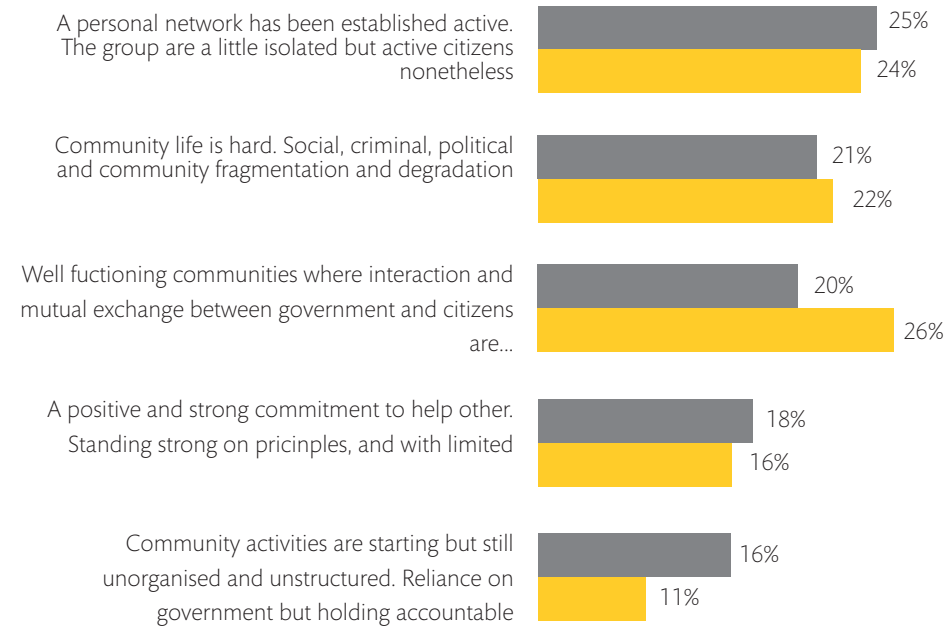


Source: Brand SA: State of the Nation Report 2024

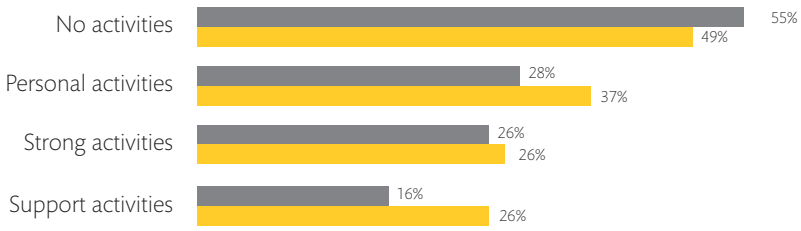
Social Cohesion



Active Citizenship

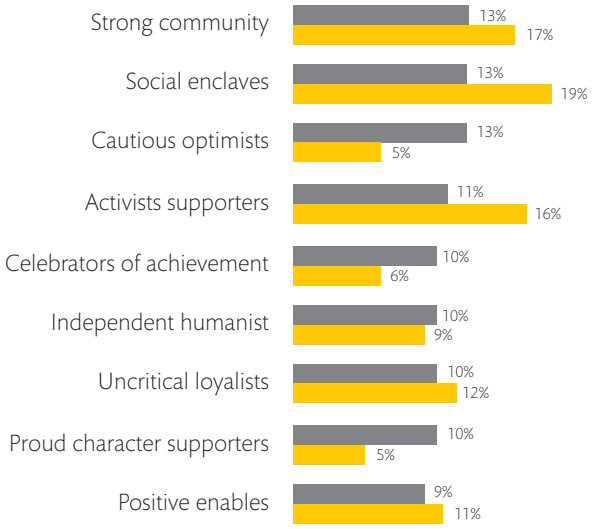


Activity intensity



Source: Brand SA: State of the Nation Report 2024

Behavioural expression comparison



Source: Brand SA State of the Nation Report 2024

18. Behavioural Group Development

An explanation of the behavioural groups

The three constructs as discussed in the previous chapters are the building blocks of the behavioural expressions, orientations or groups within the South African context.

Taking all three constructs together, a total of 110 statements are the development framework of the behavioural groups. The analysis protocol remains the same as with the separate constructs, it is now within a broader context.

The development of the behavioural groups as described in the accredited Politikon Journal 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 Awards.

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.

This Brand SA monitoring initiative expresses the nation's sentiment as a characterisation of being South African using the behavioural groups. The 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 also have fewer behavioural expressions of what the national identity or brand identity of the nation is. South Africans have, over the past eight years, expressed their sentiment of what it means to be South African in many different and changing ways.

The Story of South Africa's Nation Brand: A Journey of Identity and Collective Purpose

This is the story of Brand South Africa's (BSA) nation brand monitoring research program, 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 48,500 interviews, conducted over eight years.

BSA, the custodian of the South African nation brand, this historic work as a reflection on the South African nation brand.

Nation Branding is 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 products, services, 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, 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).

https://www.tandfonline.com/doi/full/10.1080/02589346.2020.1715048

G20 SOUTH AFRICA 2025
South Africa
Inspiring new ways

Nations have no choice but to brand. Wealth is created primarily through the value added by national brands as an expression of what is offered. Competition has evolved into 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 partner developed the nation brand composite based on three constructs: National Pride, Social Cohesion, and Active Citizenship.

National Pride

*"**National pride** is the positive affect or feeling that individuals have towards their country, stemming from their national identity."*

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).

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."

Active Citizenship is not something a community or individuals have or acquires. 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.

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.

https://journals.sagepub.com/doi/abs/10.1177/0020715218805793
https://www.opensocietyfoundations.org/voices/active-citizenship-can-change-your-country-better

Active Citizenship

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's 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."

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.

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.

Reflecting on the development of the nation's brand

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

Salience

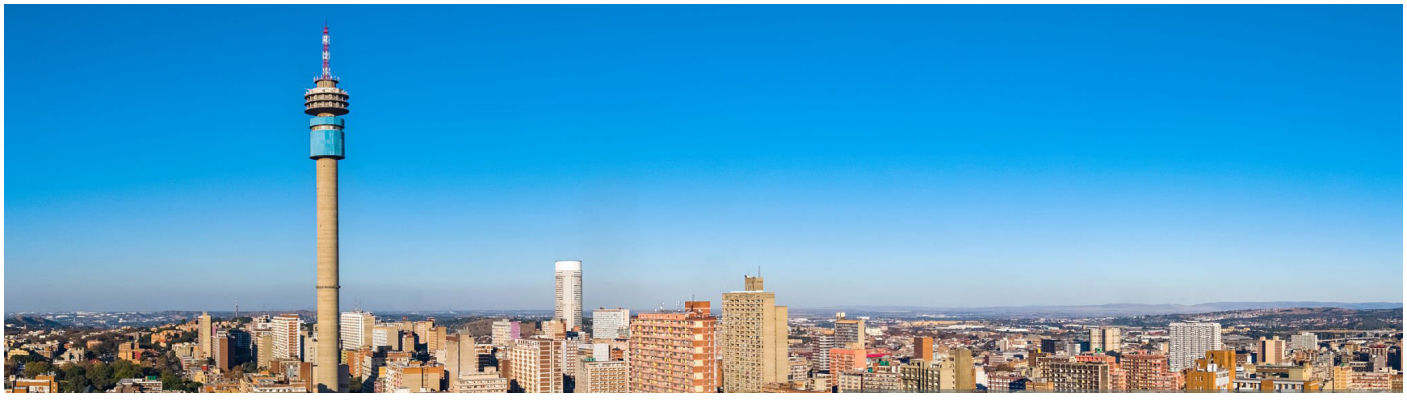
The higher the salience of a behavioural group, the more attention it attracts and the more important it is as an expression of what it means to be South African. The behavioural groups are ranked based on salience, with some being more important expressions of the character of the nation at a point 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 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 associate with the group.

As expected, the size and salience of the behavioural groups change 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.

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.



https://www.saferspaces.org.za/blog/entry/social-cohesion-and-collective-violence-in-south-africa

A comment on segmentation and segment analysis

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's definition of social cohesion applies:

The first is to determine the segments, based on a set of criteria, and then measure how these segments change over time. This is the most common form of market segmentation. It does run the risk that the originally created segments may grow out of touch with the market assessed and eventually data points are "forced" into existing segments. This is usually overcome by focusing on elementary attributes such as demographics, income, social status, employment status, or life-stage analysis. This form of segmentation assumes that people in similar demographic groups, living in similar areas, and being in similar life stages, think the same.

The second approach, and the approach used in this analysis, is more complex and requires greater scrutiny of the data, but is more realistic. The segmentation methodology, not the segments themselves, is the consistent factor in the development of the segments. This approach allows the data to define the segments every time. It provides flexibility and avoids the risk that people are classified into clusters that may no longer be relevant.

Considering the second approach in the development of the behavioural groups, critics argue that the groups may be different every time. That is not true, the consistency of some behavioural group's year-on-year is remarkable. However, the emergence of new groups points toward the development of new trends, new social identities, and new ways in which people identify with what it means to be South African.

For instance, consider the first Indhumathi South Africa Scenarios 2030 report, which presented three possible scenarios for South Africa. One of those scenarios was the iSbhujwa, An Enclave Bourgeois Nation with the description: Epitomising a loose-limbed, jumpy nation with a frenetic edge, iSbhujwa is a South Africa torn by deepening social divides, daily protests, and cynical self-interest.

In the 2024 behavioural group analysis, for the first time, a segment emerged that typifies the social enclave narrative.

Had the segments been set from the start, following the first approach to segmentation analysis, this newly developing segment would not have been found.

It is noted that President Cyril Ramaphosa used the updated version of the Indlulamithi South Africa Scenarios 2035 report in the opening of Parliament in 2024. The three scenarios were changed to Hadeda Homes, Vulture Culture, and Weaver Work. In recent focus group sessions, most felt that we are a Vulture Culture nation.

The second example, in focus group discussions in 2021, a comment was made that society is beginning to recognise that the common enemy is government, not different race groups, income groups, or other social clusters. That same year, emerging as a small behavioural cluster, the Proud Character Supporters group emerged. In 2022, that group moved to first position, becoming the strongest characteristic of what it means to be a South African and which led to the many political developments in the run-up to the 2024 elections.

It is therefore, based on the logic of the segment development and the examples given, that the Brand South Africa behavioural group segments are the most appropriate for measuring something as complex as the South African nation.

19. Historic Behavioural Group Review

In this section, the eight years of behavioural group monitoring are illustrated and briefly discussed to provide context for what has been shared in this report. The survey started in 2017, the year before major changes started to happen in South Africa, and appropriately called the benchmark year.

2017: A Pivotal Year in Shaping South Africa's Nation Brand

The year 2017 stands as a meaningful benchmark in South Africa's journey of transformation and renewal. During this period, the nation was united in its vision of building a better future for all its citizens. As reflected in the first survey conducted just weeks before the change in presidential leadership, South Africans demonstrated a growing awareness of the country's political landscape. While the full scope of issues such as state capture and mismanagement of resources was not yet fully known, the survey results provided a clear and authentic snapshot of the nation's character and values at the time.

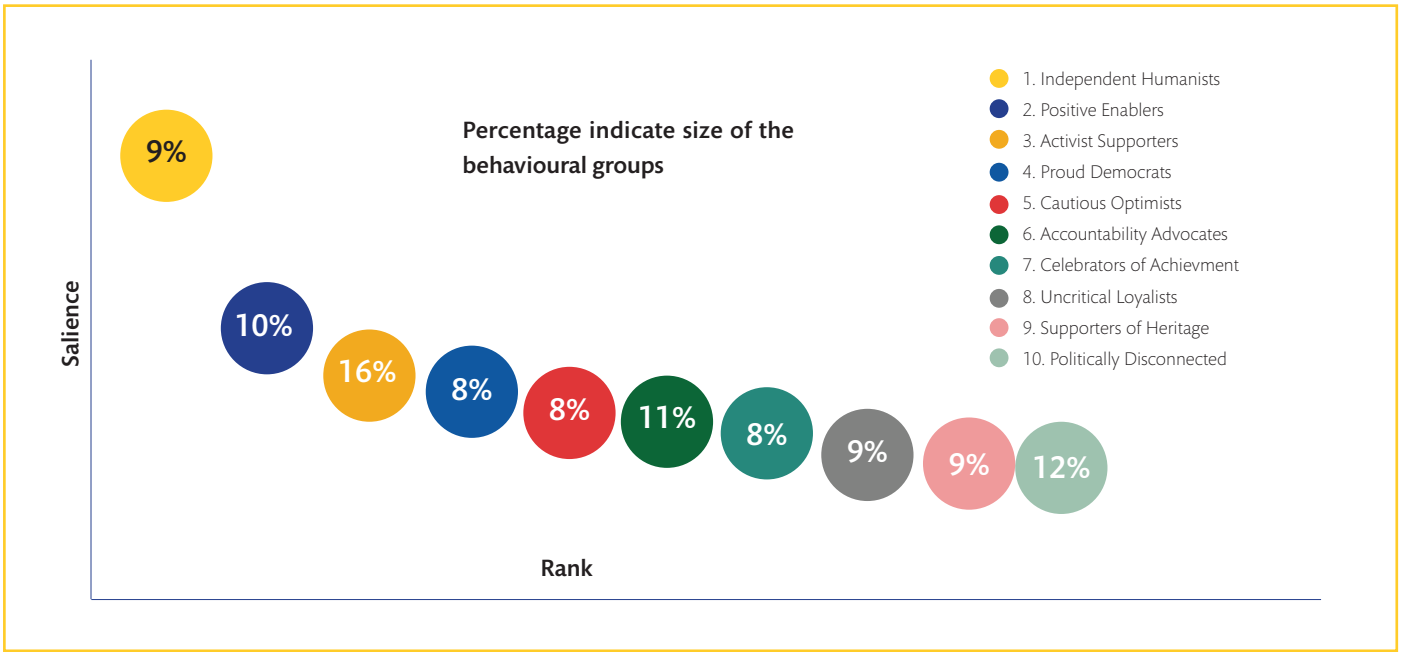
The data revealed four prominent behavioural groups that strongly reflected the nation's identity, each with a shared spirit of altruism but with unique perspectives. Independent Humanists are grounded in compassion and mutual support within their social networks, valuing diversity while choosing to steer clear of divisive political discussions. Positive Enablers are active citizens who champion community engagement and participation in development initiatives, embodying the principles of active citizenship. Activist Supporters believe in accountability through collective action and advocacy, inspiring others to raise their voices for social change. Proud Democrats treasure the freedoms earned through democracy and value the right to vote and engage in civic life.

Other groups added rich layers to the national character. Cautious Optimists view South Africa as a country full of opportunity and global potential. Accountability Advocates are focused on personal responsibility and contribution, encouraging self-reliance and commitment. Celebrators of Achievement take pride in South Africa's accomplishments in sport, science, and the arts, highlighting national excellence.

Uncritical Loyalists and Supporters of Heritage honour the country's liberation history and remain confident in the leadership that shaped its democratic path. Meanwhile, the presence of the Politically Discontented group reflects an engaged and discerning citizenry aware of challenges and committed to holding leaders to high standards of integrity and performance.

Together, these diverse perspectives captured in 2017 offered an authentic and hopeful image of South Africa's evolving brand grounded in pride, active citizenship, and a shared commitment to progress.

Figure 86: 2017 behavioural group profile – 10 groups



Source: Brand SA: State of the Nation Report 2024

It is particularly the final group in the 2017 analysis, the Politically Discontented that provides a sneak preview of what the nation was beginning to realise the impact of corruption and mismanagement was.

The 2017 behavioural group composition had a strong altruistic vantage point, which changed radically in 2028.

2018: A Year of Awakening and Renewed Commitment

In 2018, South Africa entered a new chapter marked by a renewed sense of purpose and accountability. With President Cyril Ramaphosa's call for a "New Dawn," the nation witnessed a bold commitment to restoring ethical leadership and enhancing service delivery. His decisive actions, including the establishment of key commissions to uncover corruption and inefficiencies, signalled a strong intent to rebuild the nation's foundation and regain public trust. His leadership resonated with many, inspiring hope during a time of reflection and recalibration.

This year became a period of great realization for South Africans. The nation began to fully grasp the depth of mismanagement that had compromised the promise of democracy. Despite the shock of these revelations, they also became a catalyst for national introspection and a more informed citizenry. Institutions such as the State Capture Commission, SARS Commission, PIC Commission, and NPA Commission brought clarity and accountability to the fore.

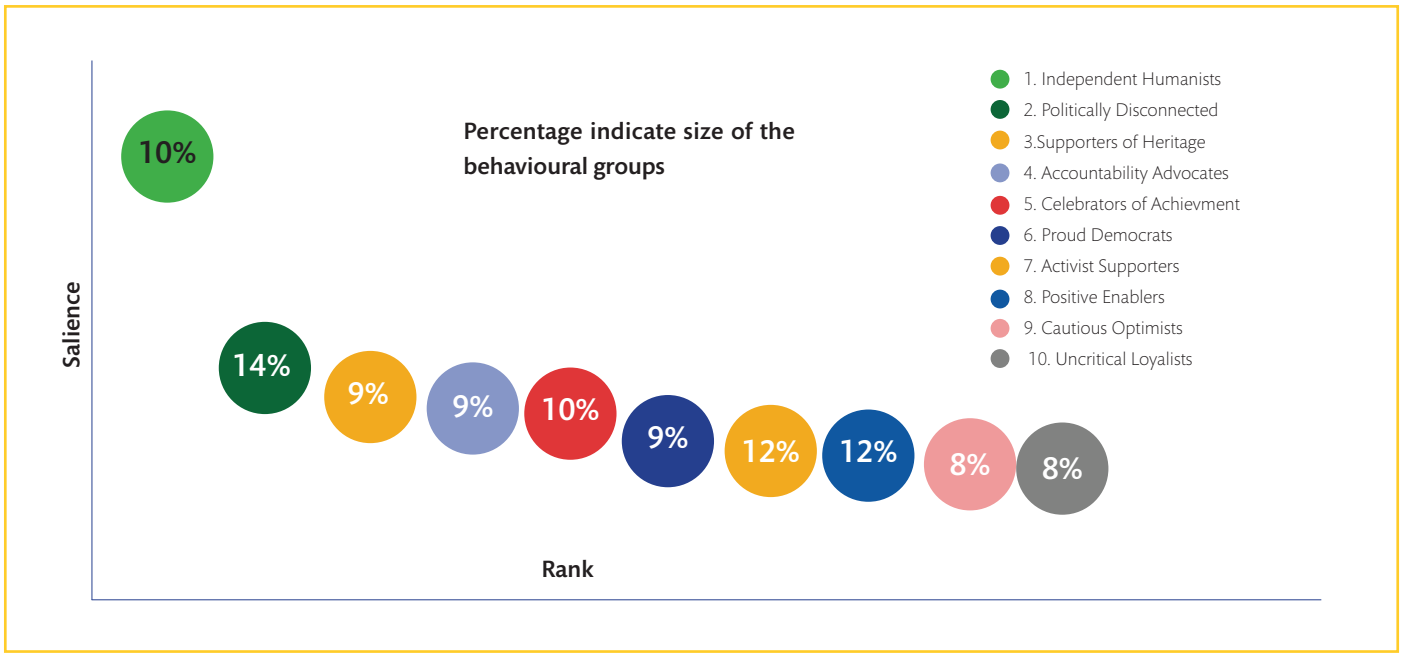
Amid these developments, the Independent Humanists remained a guiding example of South African values, demonstrating care, unity, and resilience, even as they became more distinct in their stance. Other altruistic groups, once prominent in shaping the national identity, temporarily stepped back in the face of growing public scepticism. The shift highlighted a transformation in how South Africans saw themselves and each other: from collective altruism toward more individualized, yet purposeful, engagement.

A notable development was the emergence of the Political Supporters group, individuals who, while still believing in the government's intentions, now approached political leadership with greater awareness, discernment, and critical thinking. This evolution from Uncritical Loyalists to cautious supporters marked a maturing political consciousness that values transparency and accountability.

Though trust in government and community cohesion was tested, it did not disappear. Rather, groups like the Positive Enablers adjusted their efforts, choosing to focus their community work closer to home or through trusted institutions such as churches. Their slight increase in numbers reflects a quiet perseverance and continued belief in making a difference, albeit in more focused and sustainable ways.

The Proud Democrats, though shifting in rank, continued to embody democratic values and the spirit of participation. Their presence reflected a citizenry that, even in times of doubt, remained committed to the principles of freedom and fair representation.

Figure 87: 2018 behavioural group profile – 10 groups



Source: Brand SA: State of the Nation Report 2024

2019: A Nation in Transition and Reflection

The year 2019 marked a significant phase in South Africa's democratic journey, a time of political participation, national reflection, and the emergence of new citizen priorities. On 8 May 2019, the country held its first national election under the leadership of President Cyril Ramaphosa. A record-breaking 48 political parties were registered on the ballot, signalling a vibrant and pluralistic democracy. The election results reaffirmed the ANC's leadership with 57.5% of the vote, while the DA secured 20.8%, and the EFF followed with 10.8%, showcasing the country's dynamic political landscape.

Leading up to the elections, South Africans navigated several major developments, including service delivery protests in Alexandra and Tshwane, as well as concerns around xenophobic incidents and allegations of foreign influence in the electoral process. Despite these challenges, the national mood reflected a people actively engaging with their democratic environment, asking questions, demanding more, and starting to reshape their expectations of leadership and governance.

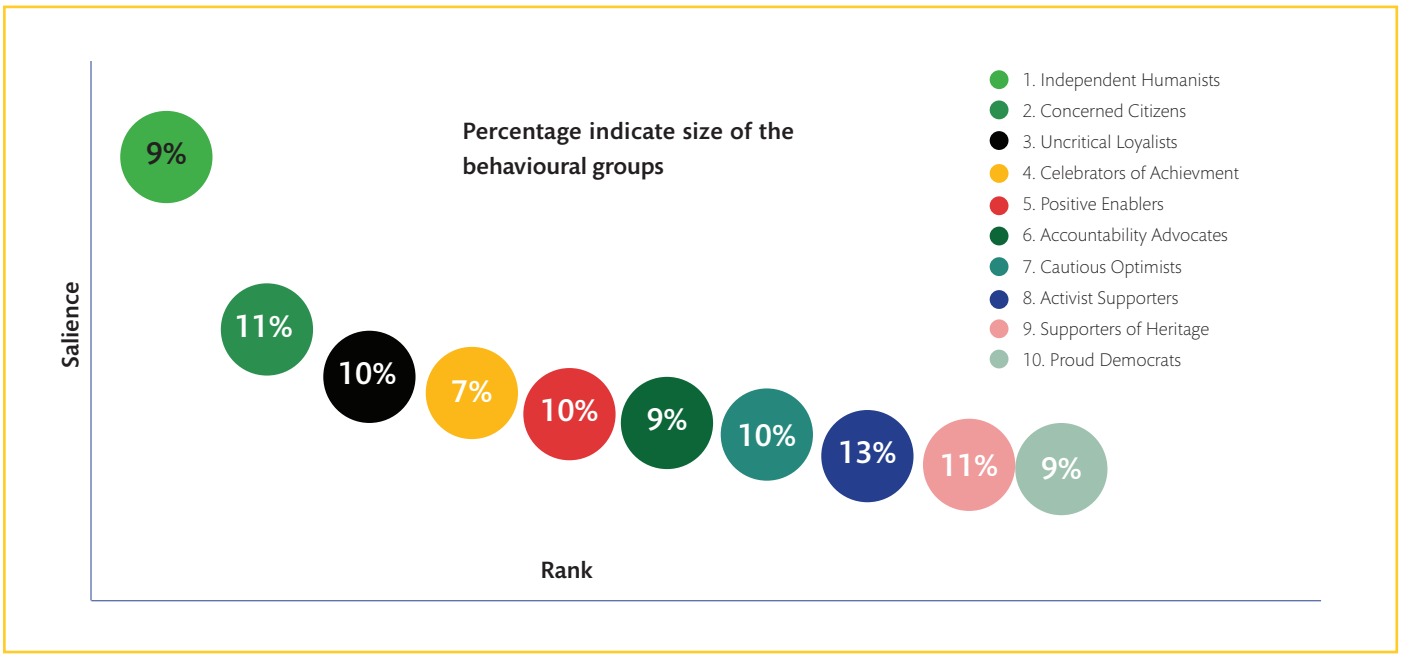
During this time of transition, the Independent Humanists continued to reflect the strongest alignment with what it means to be South African, grounded in compassion, diversity, and mutual support. Rising alongside them were two distinct groups that captured the nation's evolving perspectives: Concerned Citizens and Uncritical Loyalists. While both groups valued the role of government, their approaches differed. Concerned Citizens expressed a hopeful yet cautious outlook, supporting government efforts while remaining alert to gaps in service delivery and implementation. Uncritical Loyalists, meanwhile, demonstrated steadfast faith in government leadership, trusting in its guidance during uncertain times.

The Positive Enablers individuals committed to active community involvement reclaimed a stronger position in the national identity. Although the group slightly decreased in size from 12% to 10%, its continued presence affirmed the enduring spirit of ubuntu and the role of citizens in shaping a caring and participatory society. Encouragingly, other altruistic groups also began to reemerge, slowly reinforcing values of unity, social responsibility, and nation-building.

A notable shift occurred among the Proud Democrats, whose symbolic connection to the values of 1994 seemed to fade during this period of uncertainty. While their salience score declined, their legacy remains a foundational part of South Africa's democratic heritage, now being reimagined by a new generation of citizens charting their path.

By the time the third national brand perception survey was conducted in late 2019, shortly before the world would change with the emergence of COVID-19, South Africans were beginning to process the lessons of the past. Amidst continued reports of corruption and mismanagement, citizens were forging a more nuanced and mature national identity defined by resilience, active engagement, and a desire for lasting transformation.

Figure 88: 2019 behavioural group profile – 10 groups



Source: Brand SA: State of the Nation Report 2024

2020: Building Hope in a Time of Uncertainty

The year 2020 marked an extraordinary turning point in South Africa's nation brand narrative, a moment of profound pause and deep reflection. As the world was thrust into the COVID-19 pandemic, South Africans, still carrying the emotional weight of prior years, found a renewed sense of togetherness and purpose. What could have been a destabilizing moment became, in fact, a national reset—an opportunity to regroup, reassess, and reaffirm shared values.

On 26 March 2020, South Africa entered a strict Level 5 lockdown. The initial response was marked by confusion and disbelief. In April, public satisfaction with the functioning of government and democracy reached a historic low, yet this dip was short-lived. By May, as the full scope of the pandemic became clear, trust and understanding rebounded. Citizens, recognizing the magnitude of the challenge, rallied in support of one another.

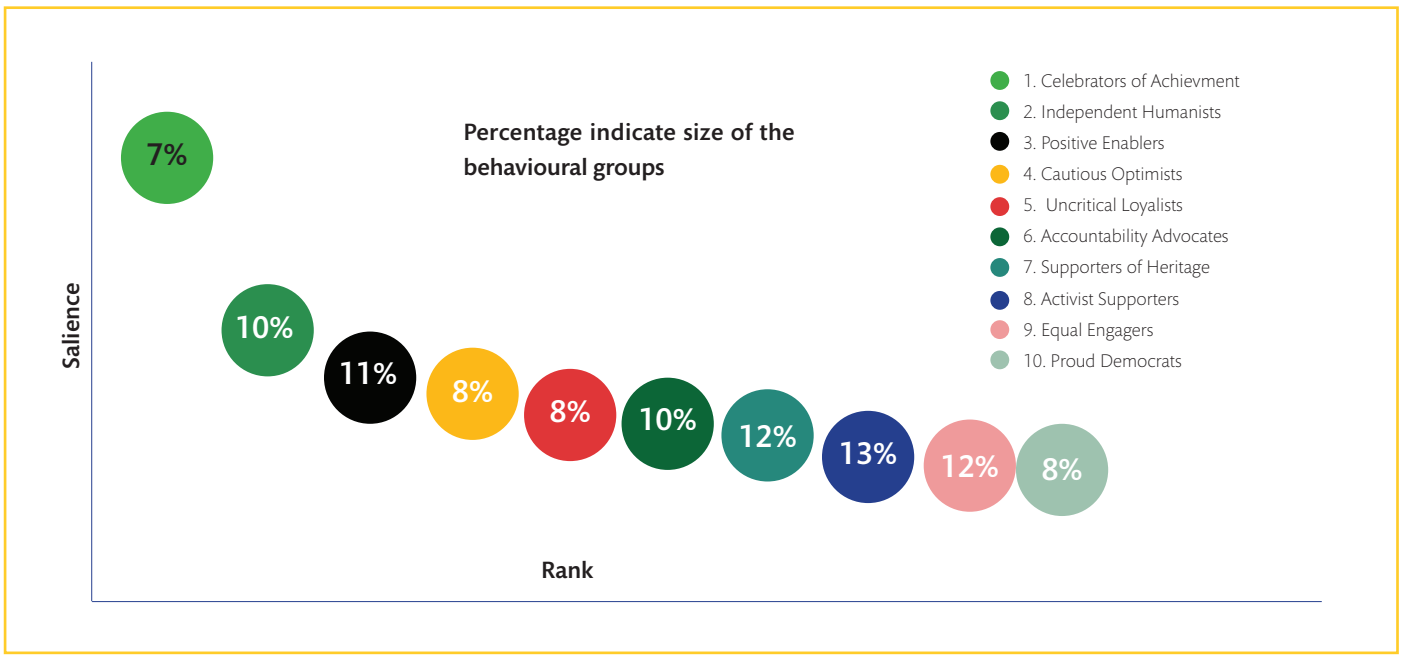
This collective spirit was reflected in the prominence of the Celebrators of Achievement, who rose to the top of the national identity rankings. Inspired by the courage of frontline workers, stories of kindness, and visible environmental recovery, this group reminded the nation of its capacity to overcome through innovation, resilience, and hope.

Importantly, the Independent Humanists and Positive Enablers—two altruistic groups previously aligned in vision—rose together to occupy second and third place. Their growing synergy, marked by compassion, social responsibility, and community engagement, foreshadowed their eventual merging in 2021 as a powerful force for good in the nation's social fabric.

While the Uncritical Loyalists slipped in significance, a new group emerged: the Equal Engagers. This group represented an inspiring evolution in civic participation. Rooted in the belief that communities should be functional, inclusive, and driven by accountability, Equal Engagers brought with them a fresh optimism. They believed in building communities where everyone had the opportunity to contribute meaningfully, not equally, but in a way that recognized diverse capabilities and potential. Their emergence marked the start of a new kind of local leadership grounded in equity, purpose, and partnership with government structures.

2020 was more than a year of crisis; it was a year of reconnection. As the world stood still, South Africa took the opportunity to recalibrate its values, rediscover its shared humanity, and reimagine a future built on empathy, action, and unity.

Figure 98: 2020 behavioural group profile – 10 groups



Source: Brand SA: State of the Nation Report 2024

2021 – Renewed Purpose and Participation

The fifth wave of the research programme commenced shortly after the local government elections on 1 November 2021, revealing an encouraging return to the nation's caring spirit–this time, with deeper roots and broader reach. Despite the challenges faced in recent years, including the national reckoning in 2018, the COVID-19 pandemic in 2020, and the civil unrest of mid-2021, South Africans began to rebuild their collective identity with greater purpose and determination.

A significant shift was observed in citizens' approach to nation-building. While reliance on government has lessened, the spirit of community involvement has grown stronger. The Independent Humanists and Positive Enablers, once separate forces of care and action, have come together to form a unified expression of national character—one grounded in empathy, diversity, and active citizenship. Their once-exclusive attributes are now being embraced by many others, reflecting a more inclusive and participatory national ethos.

The Celebrators of Achievement continue to shine, holding second place by recognising everyday acts of heroism and progress. The Equal Engagers rose notably in influence, now ranked third, representing active citizens who take pride in functioning communities and hold local leaders accountable. Their focus on equality through civic action exemplifies the nation's move towards fairness and shared responsibility.

Uncritical Loyalists, while still supportive of the state, have narrowed their dependency to essential services like healthcare, education, and social support. Their upward movement suggests a more focused trust in key areas, rather than blanket dependence.

The Proud Democrats have made an inspiring return, leaping from last to fifth place. Their re-emergence signals a renewed commitment to the values of freedom, democracy, and open expression as key components of being South African.

Two new groups added fresh dimensions to the national identity. The Relevant Influencers champion South Africa's global standing and its commitment to fairness and equality, while the Proud Character Supporters celebrate the heart of the nation—a deep recognition of its compassionate and caring nature. This marks a shift from outward symbols to a stronger awareness of the country's collective soul.

The Accountability Advocates continue to play a vital role by promoting transparency and responsible governance. Meanwhile, the Supporters of Heritage group gradually dissolved as members found new avenues for expression, contributing to other evolving identities.

Though the Activist Supporters currently sit near the bottom of the ranking, signs of positive transformation are visible. They report feeling more connected to others, even amid challenges, and show potential for renewed relevance. Similarly, the Cautious Optimists, while currently least prominent, are giving way to more defined expressions of identity rooted in mutual respect, democratic values, and national achievement.2021 – Renewed Purpose and Participation

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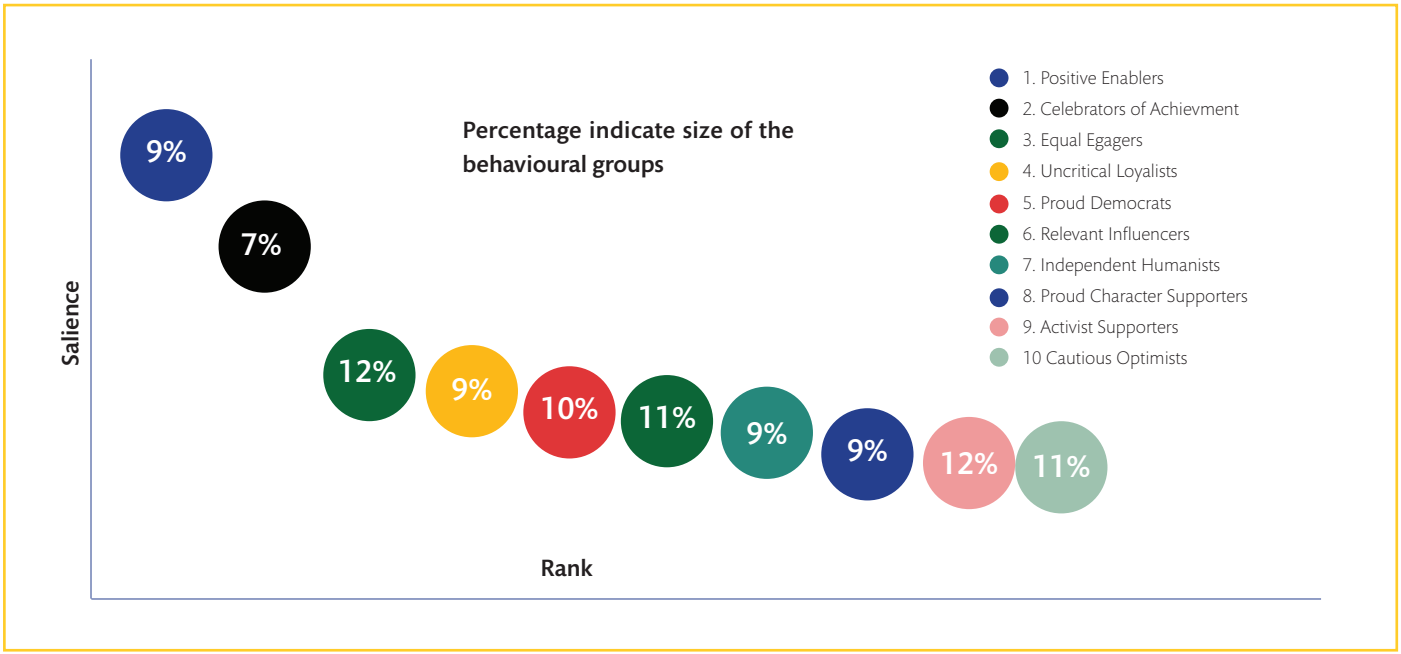
Figure 90: 2021 behavioural group profile – 10 groups



Source: Brand SA: State of the Nation Report 2024

2022 – Strengthening the South African Identity

As South Africa continues to evolve its nation brand rooted in the foundational pillars of National Pride, Active Citizenship, and Social Cohesion, it becomes increasingly valuable to understand the mindsets and attitudes of its people. The behavioural expressions observed in the population reflect how South Africans connect around shared values that contribute meaningfully to building a cohesive and thriving nation.

Between 2017 and 2021, ten distinct behavioural clusters emerged, representing the diverse yet interconnected ways South Africans relate to their country. While the makeup of these clusters experienced natural shifts, some fading, others emerging, the central insight lies in how these expressions ranked in terms of their contribution to the nation's character.

One of the earliest and most impactful groups, the Independent Humanists, focused on caring for one another outside the realm of state structures. Although this group phased out after 2021, its core values have been absorbed and carried forward by newer, more contextually relevant expressions.

Similarly, the Proud Democrats, those who cherish the freedoms won in 1994 and the principles of democracy, faced a temporary disruption during the height of COVID-19 restrictions in 2020. Their return in 2021 and continued presence in 2022 affirm that democratic values remain deeply embedded in the South African identity.

As the three core constructs matured over time, they led to a natural consolidation of behavioural expressions. From as many as seven clusters under a single construct in 2017, South Africans have gravitated toward clearer, more unified themes. By 2022, the population's mindset was distilled into eight well-defined behavioural clusters, each reflecting distinctive yet cohesive social, psychological, and behavioural patterns in what it means to be South African.

These clusters are not merely categorized under individual constructs; rather, they are rich, multifaceted expressions that embody unique combinations of pride, responsibility, and unity. Each reflects how individuals relate to the broader concept of nationhood and contribute to shaping South Africa's collective identity.

Taken together, the 2022 findings present a more confident and coherent national character—one built on shared values, evolving mindsets, and a deepening commitment to the ideals that define modern South Africa. The growing conviction among South Africans highlights a nation steadily aligning around who it is and who it aspires to become.

The Central Idea

South Africans value 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 who may have lost feeling part of the most diverse country in the world!

Each sentence is deconstructed to illustrate the meaning and purpose of 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 on 27 April 1994 in the first South African democratic election. The voter turnout was very high on the day. A peaceful day in which everyone committed to making a change. Those that fought for change either living in the country 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.

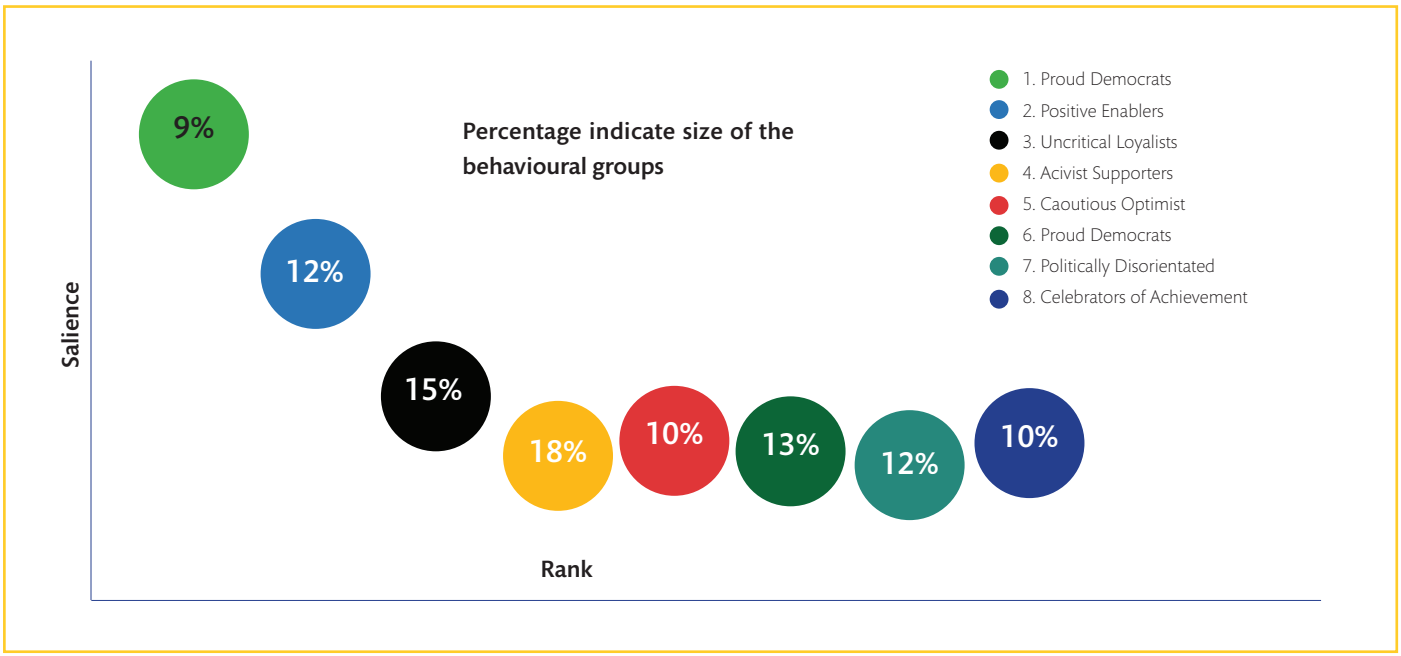
Despite the challenges, and there is no point denying it, South Africans continue to contribute in various ways. Some may only be able to put food on the table, others may promote multi-million-dollar investments, but the fact is, each contributes to economic activity, the exchange of goods and services to improve their own as well as the lives of others. The evidence of active citizenship, the collective sense of national pride are clear indicator 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 who may have lost feeling part of the most diverse country in the world!

What was fought for in 1994 was about doing the right thing. To strengthen the inherit foundation of what we continue to value. Through that commitment, we debate, discuss, and seek solutions to maintain social and economic systems to benefit all. Some have lost this view: the critics, the protesters, the unemployed, and the disenfranchised; they need guidance, support, and help to rekindle the foundations of what it means to be part of the most diverse country in the world.

As predicted, Proud Character Supporters will most likely strengthen and have. This, followed by the Positive Enablers, sets the tone of a developing national character. Furthermore, the number of groups was reduced from ten to eight, meaning a consolidation of views. The Uncritical Loyalists and Activist Supporters set the scene for what has become the Social Cohesion character of the nation – an unsatisfactory relationship with government structures that is needed but not delivering what it should. The Proud Democrats remain in the background as the 2024 elections draw closer, fuelled by the Politically Discontented, a group that re-emerged after the first, 2017 reading. The Celebrators of Achievement, in last place from first in 2020, retain some of the remnants of COVID-19.

Figure 91: 2022 behavioural group profile – 8 groups



Source: Brand SA: State of the Nation Report 2024

2023 –Rise of the Independent Thinkers

In 2023, despite a challenging landscape shaped by political uncertainty, persistent economic stagnation, high unemployment, and concerns around public safety, a new and encouraging development has emerged within the South African psyche—a growing movement of independent thinkers and active citizens stepping up to shape their futures and improve their communities.

This rising spirit of initiative has been especially evident since the 2021 unrest. Across the country, communities have begun to self-organize to protect and uplift one another, addressing local challenges with creativity and determination. These groups are not only defending their spaces against threats like crime but also nurturing hope and resilience at a grassroots level. Their actions highlight the deepening commitment of South Africans to take ownership of their environment, driven by a sense of purpose and unity.

While the emergence of these clusters of thought and action could evolve into tightly knit networks that risk social fragmentation, there is also clear evidence of increased social engagement, trust, and tolerance. Alongside these positive trends, a heightened level of discernment is taking root, pointing to a more self-aware and conscious population. In some instances, the potential for polarisation exists, but overall, South Africans are engaging more meaningfully with one another and with the idea of being part of something bigger.

The eight behavioural clusters of 2023 offer rich insights into how South Africans are expressing their identity and contributing to national development:

Positive Enablers remain at the forefront, driven by a strong humanitarian spirit and a proactive commitment to uplifting others. These individuals are deeply engaged in acts of service that go beyond survival—they're working to positively transform their communities. While their activities may often take place within smaller, focused groups, their overall impact is significant and heartening.

Celebrators of Achievement find joy and unity in moments of national pride, from sports and science to natural beauty and innovation. In uncertain times, this group provides a crucial morale boost, helping South Africans remain connected to their collective success and possibility.

Uncritical Loyalists continue to place their faith in state institutions like the judiciary, education, and healthcare systems. With a strong sense of respect for authority and structure, they find reassurance in the government's role as a stabilizing force, particularly in maintaining social and economic balance.

Proud Character Supporters are deeply rooted in the essence of South African identity. They embody values such as Ubuntu, diversity, democracy, and a uniquely South African optimism. Evolving from earlier expressions of independence, they now proudly align themselves with a national character that reflects who we are at our core.

Cautious Optimists maintain a steady, forward-looking belief in South Africa's global appeal. They see the country as a destination for talent, tourism, and investment, and they work to promote its strengths on the world stage—even if their engagement within the country is less defined.

Activist Supporters, while small in number, bring a powerful voice to issues of inequality and systemic inefficiency. Even if not always engaged in direct activism, they resonate with the struggles of those who protest and advocate for change. Their presence highlights the continuing call for accountability and justice.

Proud Democrats, though lower in the ranking this year, remain vital to the democratic spirit of the nation. They cherish civil liberties, active participation, and the right to shape society through their voice and vote. Their commitment to democratic ideals remains a cornerstone of South Africa's identity.

Strong Community Networks, the newest and now largest group, reflect the incredible growth of local agency. Born from years of community-level resilience, these groups represent a dynamic, self-reliant approach to problem-solving. While their structures may shift over time, their defining strength lies in their independence from the state, adaptability, and strong, supportive social bonds. They collaborate, lead, and create practical change through collective action.

Together, these eight behavioural expressions capture the evolving spirit of South Africa in 2023. In a time of change, the rise of community-led action and individual initiative is a clear sign that South Africans are not retreating in the face of uncertainty—but stepping forward with conviction, creativity, and a shared sense of responsibility.

Amid the lead-up to what has been called one of the most contested elections yet, the prominence of the Celebrators of Achievement and the resilience of these behavioural clusters affirm that South Africa's national character continues to grow stronger—grounded in hope,

driven by people, and shaped by action. In 2023, despite a challenging landscape shaped by political uncertainty, persistent economic stagnation, high unemployment, and concerns around public safety, a new and encouraging development has emerged within the South African psyche—a growing movement of independent thinkers and active citizens stepping up to shape their futures and improve their communities.

This rising spirit of initiative has been especially evident since the 2021 unrest. Across the country, communities have begun to self-organize to protect and uplift one another, addressing local challenges with creativity and determination. These groups are not only defending their spaces against threats like crime but also nurturing hope and resilience at a grassroots level. Their actions highlight the deepening commitment of South Africans to take ownership of their environment, driven by a sense of purpose and unity.

While the emergence of these clusters of thought and action could evolve into tightly knit networks that risk social fragmentation, there is also clear evidence of increased social engagement, trust, and tolerance. Alongside these positive trends, a heightened level of discernment is taking root, pointing to a more self-aware and conscious population. In some instances, the potential for polarisation exists, but overall, South Africans are engaging more meaningfully with one another and with the idea of being part of something bigger.

The eight behavioural clusters of 2023 offer rich insights into how South Africans are expressing their identity and contributing to national development:

Positive Enablers remain at the forefront, driven by a strong humanitarian spirit and a proactive commitment to uplifting others. These individuals are deeply engaged in acts of service that go beyond survival—they're working to positively transform their communities. While their activities may often take place within smaller, focused groups, their overall impact is significant and heartening.

Celebrators of Achievement find joy and unity in moments of national pride—from sports and science to natural beauty and innovation. In uncertain times, this group provides a crucial morale boost, helping South Africans remain connected to their collective success and possibility.

Uncritical Loyalists continue to place their faith in state institutions like the judiciary, education, and healthcare systems. With a strong sense of respect for authority and structure, they find reassurance in the government's role as a stabilizing force, particularly in maintaining social and economic balance.

Proud Character Supporters are deeply rooted in the essence of South African identity. They embody values such as Ubuntu, diversity, democracy, and a uniquely South African optimism. Evolving from earlier expressions of independence, they now proudly align themselves with a national character that reflects who we are at our core.

Cautious Optimists maintain a steady, forward-looking belief in South Africa's global appeal. They see the country as a destination for talent, tourism, and investment, and they work to promote its strengths on the world stage—even if their engagement within the country is less defined.

Activist Supporters, while small, bring a powerful voice to issues of inequality and systemic inefficiency. Even if not always engaged in direct activism, they resonate with the struggles of those who protest and advocate for change. Their presence highlights the continuing call for accountability and justice.

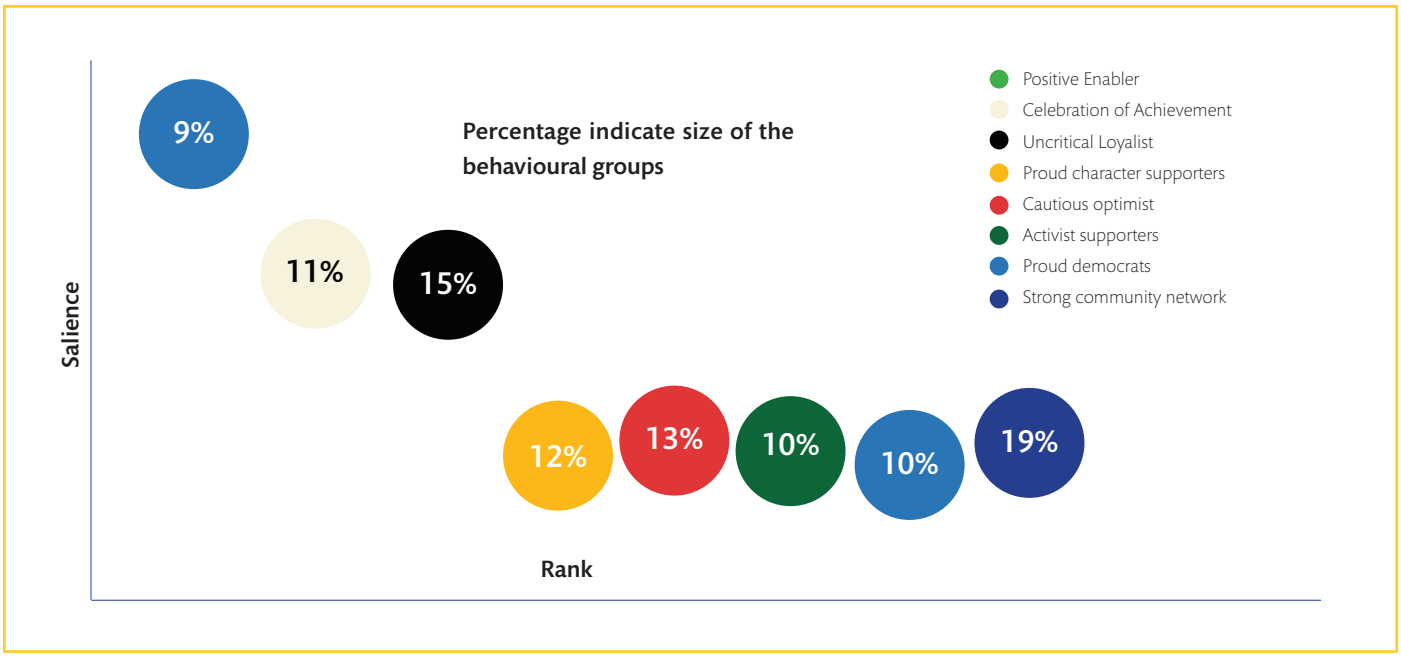
Proud Democrats, though lower in the ranking this year, remain vital to the democratic spirit of the nation. They cherish civil liberties, active participation, and the right to shape society through their voice and vote. Their commitment to democratic ideals remains a cornerstone of South Africa's identity.

Strong Community Networks, the newest and now largest group, reflect the incredible growth of local agencies. Born from years of community-level resilience, these groups represent a dynamic, self-reliant approach to problem-solving. While their structures may shift over time, their defining strength lies in their independence from the state, adaptability, and strong, supportive social bonds. They collaborate, lead, and create practical change through collective action.

Together, these eight behavioural expressions capture the evolving spirit of South Africa in 2023. In a time of change, the rise of community-led action and individual initiative is a clear sign that South Africans are not retreating in the face of uncertainty—but stepping forward with conviction, creativity, and a shared sense of responsibility.

Amid the lead-up to what has been called one of the most contested elections yet, the prominence of the Celebrators of Achievement and the resilience of these behavioural clusters affirm that South Africa's national character continues to grow stronger—grounded in hope, driven by people, and shaped by action.

Figure 92: 2023 behavioural group profile – 8 groups



Source: Brand SA: State of the Nation Report 2024

2024 – 2024 – A Year of Renewed Hope and Opportunity

This year, 2024, a few months after the elections and the establishment of the GNU, the nation feels hopeful but cautious about the new developments in the political sphere.

Taking a step back and reflecting on the development of the behavioural groups to this point. In 2017, the nation was largely unaware of the extent of state capture and particularly the depth and reach of corruption. In 2018, as several commissions of inquiry started sharing the outcome of investigations, the nation was in shock at what had happened. How is it possible that the government could change direction, and abandon what has started as a miracle nation? Everyone was under the impression that we were all working towards the same goal, a united South Africa where all contributed and shared in the prospects created as a collective. The sense of betrayal cut deep into the nation's soul.

2019 was a recovery year, name. However, hardly a chance to recover when COVID-19 hit. COVID-19 was accompanied by lockdown regulations and government restrictions that caused many to lose their jobs. In 2021 the riots and looting events changed the dynamic and largely exposed the lack of safety and security.

The nation realised in 2022 and 2023 what the government was really busy with. In 2022 the idea of a dualism emerged, the nation felt angry and frustrated, yet dependent. Particularly those that relied on social grants felt this intensely. In both quantitative and qualitative studies in 2023 sentiments of trauma, stress, depression and anxiety went along with many other experiences of feeling abandoned and forgotten by a government that is only focussed on self-interest.

Many media reports of internal divisions in the ruling party left President Cyril Ramaphosa unable or unwilling to take action. Load shedding was particularly intense in 2023. Circumstances were so stacked against government that the behavioural groups reduced from 10 to 8 as the nation consolidated their views about what was going on. In 2024, what many considered the most important election since 1994 was a major turning point.

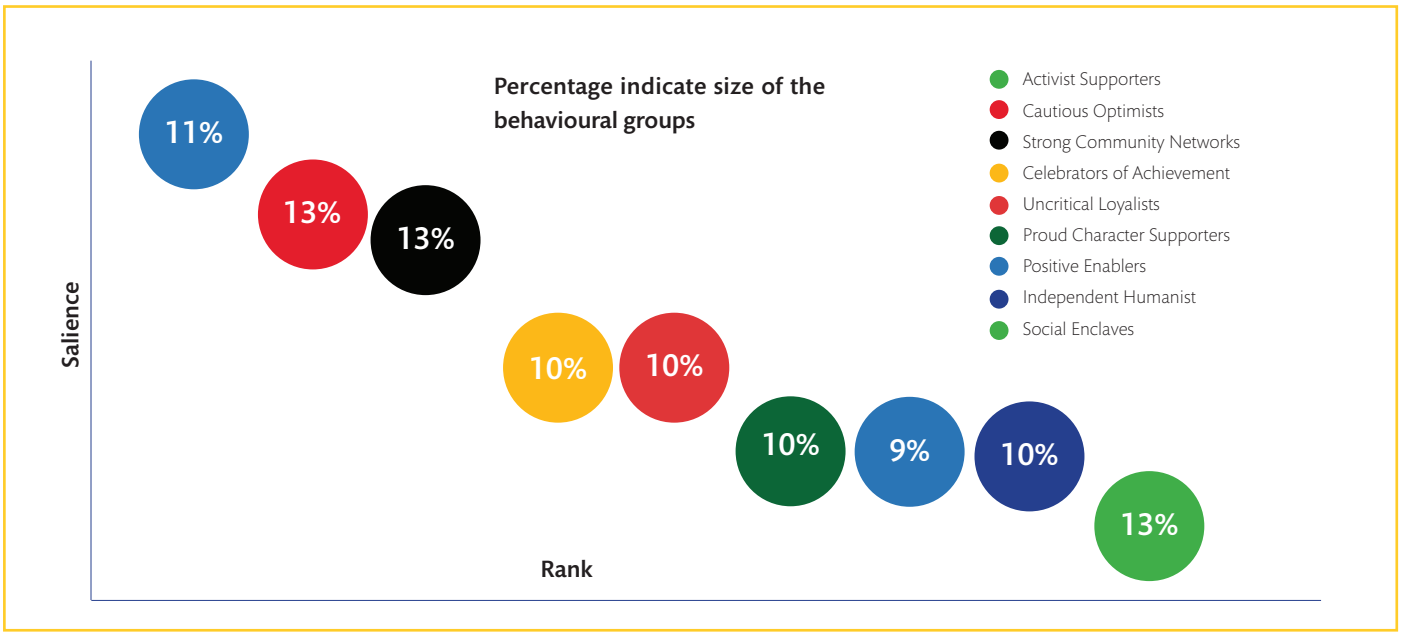
This year, the nation is hopeful that things will change. However, that sense of hope is based on limited experience. The 2024 survey was conducted in November 2024, a few short months after the establishment of the Government of National Unity (GNU).

It is based on the historic lived experiences and looking ahead trying to imagine a better future. The number of behavioural groups increase to nine as some diversity in opinions return. This year, the Independent Humanists return, last seen in 2020. This year a new group emerge, Social Enclaves. Many media reports and scenario planners have been talking about the development of social enclaves. This year, the group is large and strong enough to feature as a separate behavioural group. Slow economic growth, resulting in unemployment and inequality, is now a social reality.

Each behavioural group is looked at in more detail. Suffice to say that "Activist Supporters", "Cautious Optimists", and "Strong Community Networks" now lead the charge of the nation's belief of what it means to be a South African.

The urgency to reconnect with the nation, to illustrate and demonstrate trust, cooperation, and collective effort, is critical. The first three behavioural groups collectively illustrate that those who do not have a job, a future, and possibilities should be supported through petitions and protests in addition to doing it themselves. The cautious optimists have very little to hang their hat on apart from feeling hopeful that things will change. The strong community networks work with community structures and systems, having lost faith in broader government structures, to create safe and functioning communities. The sense of hope is strong, but the evidence upon which the hope is based lacks real evidence and lived experience.

Figure 93: 2024 behavioural group profile – 9 groups



Source: Brand SA: State of the Nation Report 2024

1. Activist Supporters feel discriminated against, experience inequality and find themselves trapped in a cycle of dependence and wanting to be independent. Many in the group are employed but their frustration with conditions for all oscillate between protest action and reluctance to participate. They have a deep sense of empathy for those without a job or prospects of getting one.

2. Cautious Optimists have limited anchor points of what it means to be South African. However, their commitment to the country is focussed outwardly, to the global community. The vague sense of identity to what it means to be South African is particularly relevant in this group. Note the distinction, it is not absent, it is just not well defined.

3. Strong Community Networks started in 2021 and have been growing year-on-year. It emerged as a behavioural group in 2023, when it was in last position. It is now in third position. The group has developed into strong community bonds working with one another and often include ward councillors. These communities organise themselves in response to failing government functions.

4. Celebrators of Achievement are characterised by their overt recognition of achievement by South Africans on a wide range of attributes and features, including natural beauty. The group is usually the indicator that things are not well. That if it is only sport and individuals, we have to hang our hopes of a country, we are in desperate times.

5. Uncritical Loyalists moved through several forms of loyalty. This year their loyalty includes civil society, media, watchdog organisations like the public protector and worker's unions. The group is no longer only focussed on government.

6. Proud Character Supporters have a deep-seated appreciation of 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 characteristics of being a South African. The cheerleaders of the nation. These are strong supporters of social media groups like "I'm staying". Initially a splinter group of the Independent Humanists that completely replaced the former group. Now the Independent Humanists are back as well.

7. Positive Enablers remain committed to making South Africa a better place. Their involvement is characterised by a humanitarian outlook. In the run-up to the elections, this group faded slightly into the background. It seems as if they are likely to return but a lot hangs on the sense of hope, as they may lose their commitment and withdraw the more unsafe and uncertain the feel.

8. Independent Humanists embrace the diversity of South Africa's people. The group is well represented in Gauteng with a slight skew towards females. The group records a sense of marginalisation due to higher recordings of racism and gender discrimination. The group was last a feature of the behavioural group analysis in 2020. Independent Humanists do not favour or support government but rather develop strong connections with likeminded people.

9. Social Enclaves emerge for the first time, although not by surprise. There have been media reports and scenario planners that spoke about social enclaves. A portion of society that lives in security villages and complexes, mostly isolated from tough and hardship filled communities. Although a sense of cohesion exists, there is a disillusioned and fragmented opinion about government.

Taking it all together, the 2024 results show three key trends:

- There is hope in the establishment of the GNU, but that hope is fragile. The Activist Supporters, Uncritical Loyalists and Cautious Optimists all underpin the fragility in various ways
- The Strong Community Networks, Positive Enablers and Celebrators of Achievement highlight that government services and support for the unemployment continue to pressurise the social fabric of the nation, leaving many feelings unsafe and uncertain
- The last, Proud Character Supporters, Independent Humanists and Social Enclaves point toward a place that does not involve government. A place where people share similar ideas and although having a deep concern about inequality, this group feels if the government is not committed to addressing the needs of these people, why should it be their responsibility

The formation of the GNU is a positive and strong development. The success of it and the development of coalition governments going forward will be key.

20. Survey detail for publication

For publication purposes, the following survey information should be shared whenever these results are made public. Research results with poor explanations of the methodology generally cause disputes and is often challenged when this information is not included.

Table 12: Survey performance and media share

Survey classification	Description
Research commissioned by Confidentiality	Brand South Africa
by Confidentiality	Respondent information is kept confidential and in line with ESOMAR Code of Conduct practices
Survey dates	The survey was administered in November 2024
Sample size	n = 3 000, a final sample of 3 030 realised
Sample selection	Multi-staged stratified random design using StastSA 2023 mid-year population estimates
Margin of error	0.097 at 95% confidence level
Data collection methodology	Face-to-face in-home interviews on Computer Assisted Personal Interview (CAPI) devices
Weighting of data	Weighted, using RIM weight methodology. Weight efficiency was 82%
Reporting	%ages are rounded

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Brand South Africa

State of The Nation Brand Report 2024-2025

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