

Morocco's reputation in the world in 2021

Summary

The Royal Institute for Strategic Studies (IRES), conducted the seventh edition of the survey on Morocco's reputation in the world, as part of the observatory of Morocco's international image set up in 2015, in partnership with leading nation-branding firm Reprtrak.

This survey is unique in that it occurred in January to March 2021, amid the global Covid-19 pandemic.

As in previous editions, the survey covered a sample of 25 countries, including G7 countries and Russia, deemed to offer the highest potential for Moroccan exports, tourism flows and direct investment in the Kingdom, as well as 17 developed and/or emerging countries from priority regions for Morocco's international positioning strategy.

The Kingdom's international reputation

The 2021 edition shows Morocco still enjoys a globally positive international image. Ranking 27th out of 72 countries assessed, Morocco held its 2020 position among global Top 30 nations on reputation among G7 countries and Russia.

Countries with a strong international reputation include Canada, Australia, New Zealand, Scandinavian countries, Switzerland, Ireland, Austria and Japan. The bottom ten ranking countries are Iraq, Iran, Pakistan, China, Russia, Nigeria, Saudi Arabia, Venezuela, Bangladesh and Algeria.

In 2021, Morocco's reputation among G7+Russia countries dropped 2.1 points, mirroring average reputation decline across 72 countries assessed.

Morocco's international reputation is equivalent to that of Chile and Hungary. It is better than that of South Korea, Malaysia, and the BRICs, and far surpasses that of Turkey and all Arab and African countries.

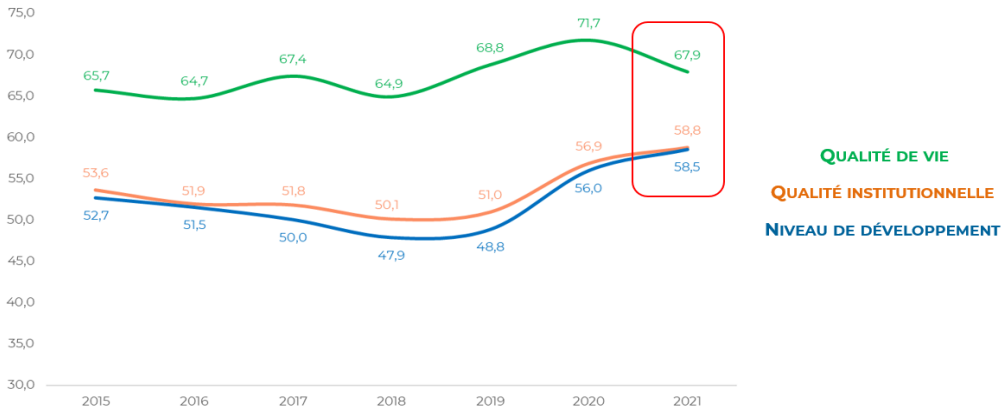
Notable improvements for Morocco's international reputation from 2020 include India (+12.4 points), Turkey (+6.4 points), Sweden (+6.2 points) and Australia (+4.2 points). Largest declines came in China (-8.2 points), Spain (-6.7 points), Italy (-5.6 points), France (-5 points) and the United States (-4.6 points).

The Kingdom's reputation in 2021 remained strong in Australia, the UK, France, the US and India. In contrast, it was weak in South Africa, South Korea, Kenya, Nigeria, and Spain.

Morocco's key international reputation drivers include quality of life attributes. Yet, rankings for "Natural Environment", "Leisure and Recreation", and "Friendly and Caring Population" fell from 2020. This can be attributed to Covid-19 radically altering citizen expectations in G7 countries + Russia. The focus now shifting to rational life-sphere development issues rather than on aspirational issues.

The "Security" attribute, as part of the "Institutional Quality" dimension, is also a strong point for Morocco's reputation.

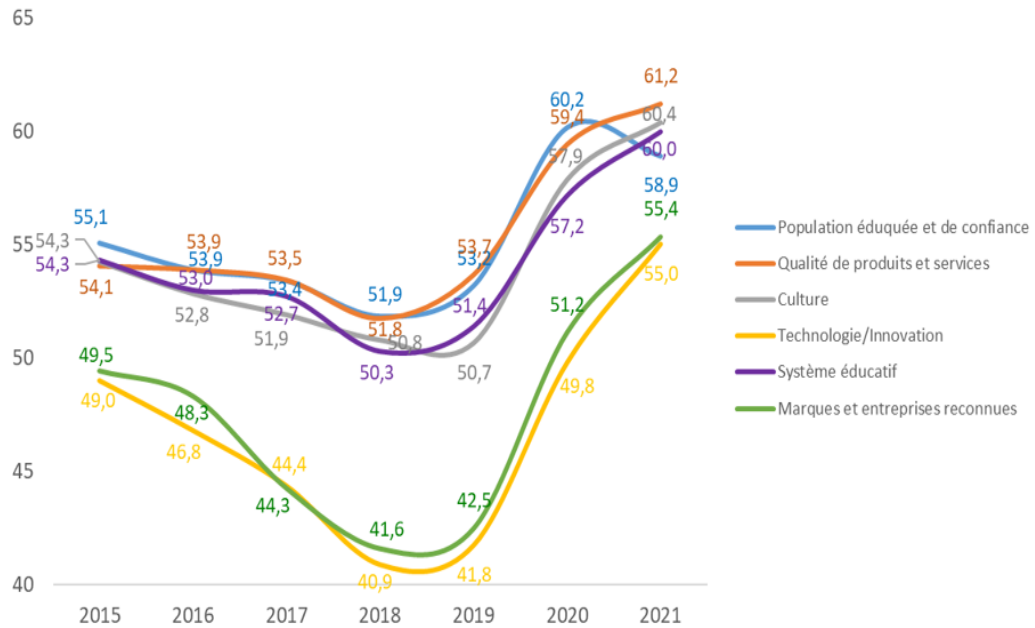
International reputation of Morocco (G7+Russia) along three dimensions



Quality of life - Institutional quality - Level of development

Assessments however remain more muted on "Level of Development" attributes, notably country innovation and technological capacity, business and brand recognition and education system. These attributes, we should nevertheless note made significant progress from 2019 Morocco reputation readings in G7+Russia, offering positive prospects for Morocco's international reputation.

Progress on "level of development" attributes since 2019



Educated and trusted population - product and service quality - culture - technology and innovation - educational system - recognized brands and companies

In fact, "Level of development" attributes have become increasingly significant in shaping country reputations, accounting for substantially higher weighting since 2019. Conversely, "Quality of life" attributes have declined in weight over the same period.

Looking at trends over time, Morocco moved up 10 spots in global rankings of 72 countries assessed on reputation among G7 countries and Russia, from 2015 to 2021.

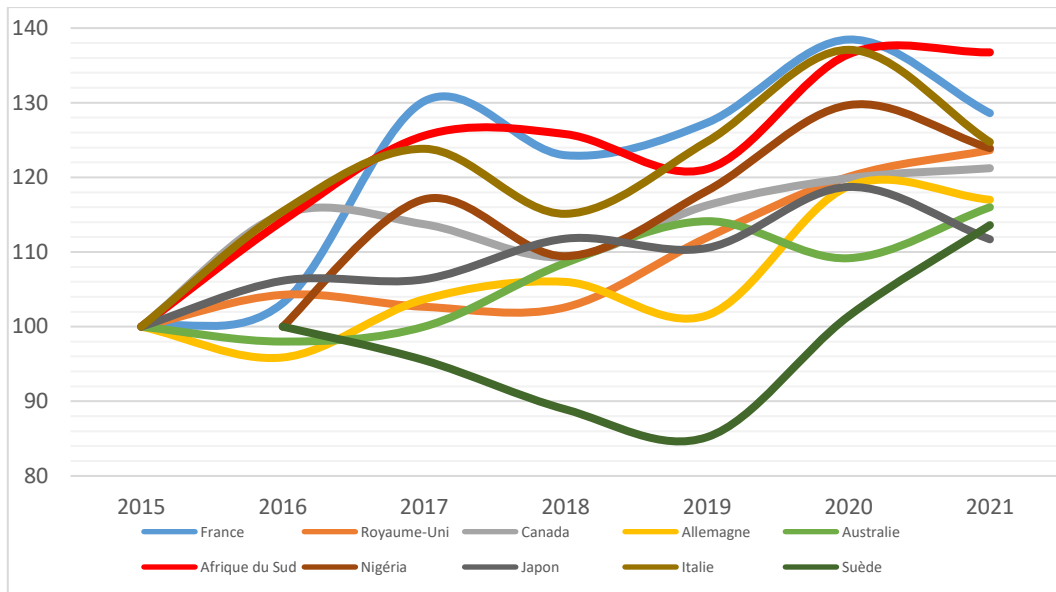
Morocco's reputation over the period improved most significantly with France, Italy, the United Kingdom, Canada, Germany, Australia, and Japan. In Africa, progress over the period, occurred with South Africa and to a lesser extent, Nigeria.

Morocco's reputation in Sweden recovered strongly, after dropping between 2016 and 2019.

While Morocco's reputation in Russia, Chile and Mexico remains stable over 2015-2021, it shows a mixed results in other sample countries. Morocco's reputation in China, especially, is not yet on par with the strategic partnership concluded in 2016 between the two countries.

Countries where Morocco's reputation is on an upward trend between 2015 and 2021

(Base 100: 2015; For Nigeria and Sweden, Base 100: 2016)



France, UK, Canada, Germany, Australia, South Africa, Nigeria, Japan, Italy, Sweden

Morocco's internal reputation

Morocco's internal reputation is the set of perceptions Moroccans have of their own country, has fluctuated and is heavily dependent on changes in Moroccans' perceptions of their institutional and political environment. The latter attribute fell the most in 2021, impeding Morocco from capitalizing on advances made in 2020, a year that saw a return of confidence in national institutions among Moroccans.

Morocco's internal reputation trends compared to its international reputation (G7+Russia)



Morocco's internal reputation, in line with a majority of countries in the sample, declined in 2021 (-4.6 points). This hit most attributes, with the exception of "Technology/Innovation," "Recognized Brands and Companies," and "Education System," improving for the second year in a row. Morocco's internal reputation in 2021 remains nonetheless favorable and far surpasses pre-Covid 2019 levels.

The comparison, of Morocco's 2021 reputation in the G7 countries + Russia with its internal reputation indicates that:

- Morocco is no exception to the general rule that internal perception is higher than external perception: its internal reputation index in 2021 exceeded that of its international reputation by 4.3 points. We should recall that the Kingdom made an exception to this rule in 2019, as it moved closer to countries that are more critical of themselves.
- Moroccans feel more strongly than foreigners that they live in a state where security prevails and where the population is friendly and amiable, that their country commands international respect and enjoys a good natural environment.
- Internal reputation is however weaker than international reputation, on institutional and political environment, resource utilization, technology and innovation, education system, ethics and transparency, social welfare, recognized brands and companies, lifestyle, quality of products and services, and economic environment.

Support behaviors towards Morocco

Morocco is still perceived as a country to visit, to purchase goods and services, or to attend events by G7+Russia nationals. Despite some progress, this willingness does not transpire with the same intensity when it comes to studying in Morocco.

All supporting behaviors improved between 2020 and 2021, with the exception of "visiting the country", declining with the collapse of tourism in the age of Covid-19. Morocco's scores for all support behaviors remain very close to global averages for 72 countries surveyed.

Morocco compared to Turkey, South Africa, Mexico, and Chile

Morocco's reputation among the G7 countries + Russia generally retains its edge over Turkey, South Africa, and Mexico on attributes of quality of life and institutional quality, among others. Morocco made up considerable ground on Chile by 2020, which was far ahead of it in 2015.

Morocco's internal reputation is far superior to that of Moroccans hold of Turkey, Chile, Mexico and South Africa. It is important to remember, however, that Moroccans previously perceived Turkey more favorably than their own country.

Last, on almost all supportive behaviors, G7 + Russia citizens place Morocco on equal footing with Chile. They also rate Morocco clearly above Turkey, South Africa, and Mexico.

Proposals

In light of the above, Morocco needs to undertake wide-ranging reforms to substantially enhance both its internal and international reputations, notably on "level of development". Reforms should encompass education, innovation and technology, brand equity and quality of products and services, alongside major projects to revive the economy, generalize social security coverage and restructure the public sector, as dictated by the health crisis.

It would also be advisable to urgently build a strong and durable Morocco brand and implement a communication policy to preserve citizen and foreign partner confidence, according to the following guiding principles:

- Differentiate communication strategy by country to combat sometimes-negative stereotypes and enhance the Kingdom's visibility abroad: the level of familiarity with Morocco among G7 countries + Russia stands, since 2017, at around 40%, providing a communication opportunity the Kingdom should seize to enhance its international reputation.
- Highlight quality of life and security assets, alongside advances made in industrial and technological areas alongside infrastructure development (the first African high-speed train, mega-ports in Tangier, Nador and soon Dakhla) and business climate upgrading.
- Continuously promote Morocco's outreach overseas, notably via the creation of a public television channel, broadcasting internationally in English, the mobilization of Moroccan diaspora scientific and artistic skills and the conclusion of partnerships with national and foreign influencers.