

MOROCCO'S REPUTATION IN THE WORLD 2023 EDITION

Summary

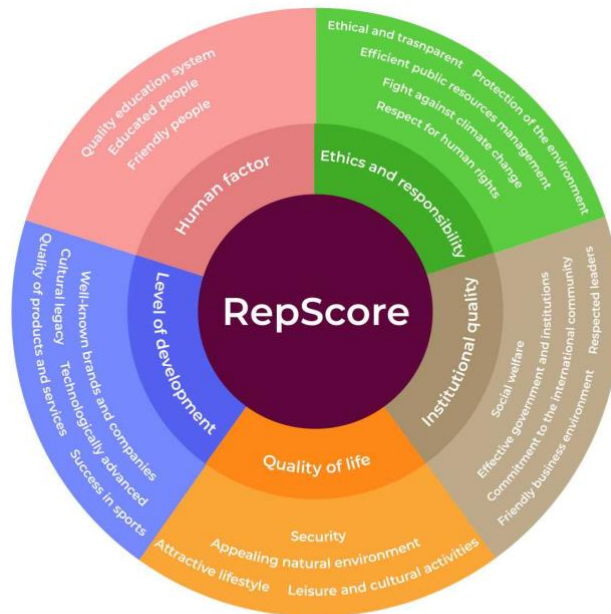
As part of the Observatory of Morocco's International Image's ongoing operations, starting in 2015, the Royal Institute for Strategic Studies (IRES), in partnership with "Nation Branding" consultancy "Reputation Lab", produced the ninth version of the survey on Morocco's reputation in 2023.

The survey was conducted during March and April 2023, against a global backdrop of persistent war in Ukraine and lingering post-Covid economic and social consequences.

Morocco's reputation was assessed in 26 countries in 2023, up from 18 in 2015. These include Algeria, Egypt, Kenya, Nigeria and South Africa in Africa, Belgium, France, Germany, Italy, the Netherlands, Spain, Sweden and the UK in Europe, Brazil, Canada, Chile, Mexico, and the United States in the Americas; Israel and Turkey in the Middle East; and Australia, China, India, Japan, Russia, and South Korea in Asia and Oceania.

Morocco's reputation, both internally and externally, was assessed using the new 2022 methodology, whereby the 22 attributes constituting the "RepScore" reputation index are categorized along five dimensions: Institutional Quality, Quality of Life, Level of Development, Human Factor, and Ethics and Responsibility.

Breakdown of rational attributes along five dimensions



RepCore[®] Nations

The external reputation of foreign countries

There was an overall decline in the reputation of all countries as surveyed by G7 countries + Russia nationals in 2023. Alongside the war in Europe (the conflict between Russia and Ukraine) clearly impacting perceptions, stronger environmental, social and governance criteria, and the implementation of Agenda 2030 for sustainable development now play an increasingly major role in building national reputations.

This translates into a greater weight applied to the "Ethics and Responsibility" dimension, which spans the attributes of "environmental protection", "combating climate change", "respect for human rights", "efficient use of public resources" and "ethics and transparency".

"Institutional Quality" is the second key dimension shaping national reputations, with its weight rising in 2023, again to the detriment of "Level of development" and "Quality of Life".

Switzerland still leads the ranking of countries with a strong external reputation in 2023, ahead of Norway, Sweden, Canada, and New Zealand. Denmark, Finland, Australia, and the Netherlands are next. Ireland rounds out the top 10 countries on external reputation in G7 countries + Russia. Countries at the bottom of the ranking are the same as in 2022: Russia, Iran, Iraq, China, Pakistan, Nigeria, Saudi Arabia, Bangladesh, Ethiopia, Venezuela, Colombia, and Algeria.

Among the top 60 countries in terms of GDP, Qatar and Israel experienced the steepest year-on-year decline in external reputation among G7 countries+Russia nationals in 2023 period: down 4.1 and 4.6 index points respectively. Qatar's ranking fell from 46 to 51, and Israel's from 33 to 46.

Morocco's external reputation

Morocco is no exception to the overall downward drift, with a drop on the reputation indicator (-0.7 points) that is practically identical to the top 60 GDP countries average (-0.6 points). In 2023, on reputation in G7 countries+Russia, the Kingdom ranks 34th out of 60 countries assessed, down two places from the 2022 ranking. Nevertheless, as in previous years, the Kingdom continues to rejoice an overall positive international image.

In 2023, the Kingdom's reputation in G7 countries+Russia is on a par with that of Peru. Better than that of the United States, Argentina and the BRICS, with the exception of Brazil, very slightly edging out Morocco for the first time, by 0.2 points, and better than that of all African and Arab countries.

In 2023, Morocco's reputation remained positive in Egypt, Australia and China, as well as in France, Germany, the UK and the USA. By contrast, as in the previous year, it broke new lows in Spain, Sweden and Algeria. Chile, South Africa, South Korea and Kenya are countries where Morocco's reputation is particularly low (reputation index score ranging from 35 to 45 points out of 100).

Between 2022 and 2023, Morocco's external reputation improved in Egypt (+3.2 points), Japan (+2.4 points), Nigeria (+2.5 points) and Spain (+2.9 points). Conversely, it dipped in South Africa (-4.9 points), Russia (-3.1 points), Kenya (-2.8 points), Chile (-2.5 points) and Sweden (-2.5 points).

More broadly (see Appendix 1), Morocco's reputation has generally trended upwards from 2015 to 2023 in Germany, France, Italy, the Netherlands and the UK. The same upward trend was observed in Canada, the United States and a number of countries of Asia and Oceania, including Australia, China and Japan. Morocco's image improved in South Africa, Nigeria and Spain over the same period.

Morocco's reputation in Belgium, Mexico and Brazil remained largely stable in 2015 to 2023. The trend, however, slopes downward in both Israel and Russia. The Kingdom's reputation was somewhat of a mixed bag in the other countries sampled (Chile, South Korea, India, Kenya, Sweden).

Morocco's external reputation - strengths and weaknesses

Morocco's external reputation strengths (see Appendix 2) stem from the "Quality of life" and "Human factor" dimensions. The "Friendly and sympathetic population", "Natural environment", "Leisure and entertainment", "Attractive lifestyle" and "Safety" attributes continue to be solid assets for the Kingdom's reputation.

Conversely, ratings remain less favorable in general on attributes inherent to the "Ethics and Responsibility", "Institutional Quality" and "Level of Development" dimensions.

Between 2015 and 2023, most attributes making up Morocco's external reputation showed an overall upward trend. However, while on a significantly upward

trend from 2019 onwards, attributes of the "Level of Development", "Institutional Quality" and "Ethics and Responsibility" dimensions have since diverged, now giving way to a downtrend.

Morocco should pay specific attention to these three dimensions, all the more so as their weighting within the "RepScore" reputation index has risen significantly since 2019, further weighing on the shape of national reputations.

The two remaining dimensions, "Quality of life" and "Human factor", are on a downtrend dating back to 2020. Attributes "Leisure and Entertainment" and "Safety" have, however, held steady over the past two years.

Morocco's internal reputation

Based on Moroccans' perceptions of their own country, Morocco's internal reputation index for 2023 came in at 61.1 points, down 2.3 points from 2022. In spite of the drop, Morocco's internal reputation remains strong, putting the Kingdom among nations where citizens are least critical of their own country.

The 2023 drop in Morocco's internal reputation ran across all attributes, with the exception of "Leisure and Entertainment" and "Sporting Success", specifically which gained 9.5 points, on the back of Morocco's historic success at the 2022 Football World Cup.

Noteworthy decreases (a gap of over 4 points between 2022 and 2023) occurred with regard to attributes "Efficient Use of Public Resources", "Institutional and Political Environment" and "Social Well-being".

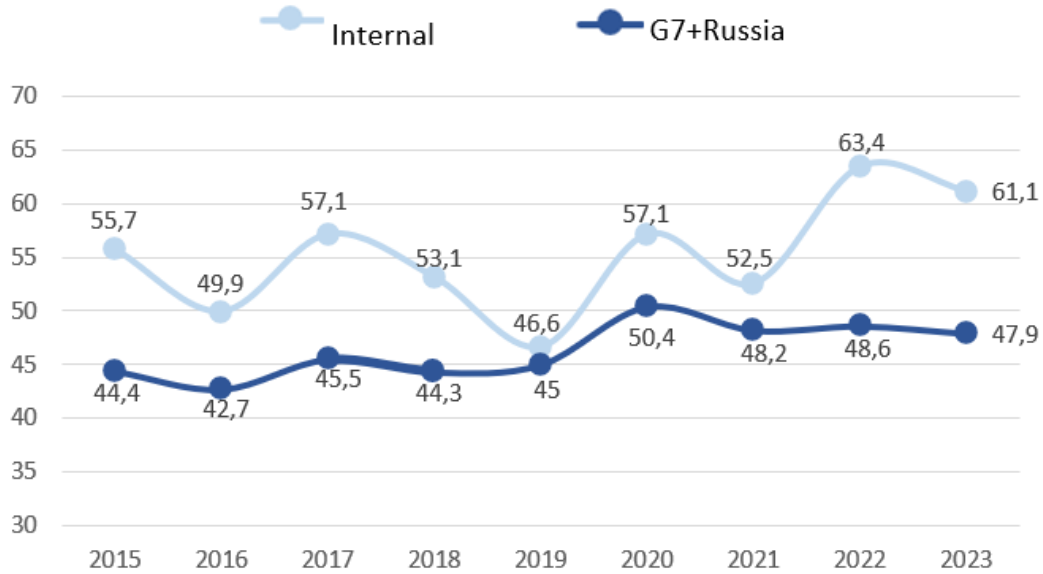
Morocco's internal reputation in 2023 confirms observations made in the previous eight editions, i.e. that the country's reputation fluctuates almost annually, depending to a large extent on how Moroccans perceive their institutional and political environment.

Comparing Morocco's external and internal reputations

Comparing internal and external reputations (in G7 countries + Russia) reveals the extent to which citizens are confident or critical of their own country. Generally speaking, internal perceptions are more positive than external ones. In most cases, there is a 10–15 point difference between the two reputations.

Morocco is no exception to this general rule: in 2023, its domestic reputation index exceeded that of its external reputation by 13 points. This gap is the second widest observed since 2015, following that of 2022, a year of notable diplomatic successes under the stewardship of His Majesty King Mohammed VI, contributing to a heightened sense of national pride among Moroccans.

Morocco's internal reputation vs. external reputation (G7+Russia), 2015-2023



Moroccans surveyed were more likely than residents of G7 countries+Russia to believe they live in a country where safety reigns, the natural environment is good, and the population is friendly and amicable. They were also more prone to feel that Morocco is genuinely engaged with the international community on crucial human issues, defending environmental protection and actively combating climate change.

Moroccans also considered that Morocco enjoyed rich cultural heritage, a business-friendly environment and high-quality products and services.

These are communication opportunities the Kingdom should leverage to build a sound foundation for its international image.

Conversely, Moroccans are more critical of their country than foreigners when it comes to efficient public resource utilization, institutional and political environments, educational system quality, social welfare, ethics and transparency.

These shortcomings, which could pose real risks to Morocco's reputation both internally and externally, are real challenges that are essential to address.

Supportive attitudes to Morocco

A country's reputation is also measured by how attractive it is to tourists, investors, business partners, international students and foreigners wishing to settle or work there.

Morocco continues to be perceived by respondents in G7 countries+Russia as a country worth visiting, although not as a strong economic player.

All forms of support behavior declined significantly in 2023. The most significant drops occurred in recommendations to work in Morocco (-2.2 points), to study in Morocco (-2.5 points) and, above all, to invest in Morocco (-3.8 points).

The 2023 edition adds 3 new intentions to the usual 7 supportive behaviors: "I would visit", "I would invest" and "I would buy". Beyond recommendations, these three new attitudes express each respondent's own willingness to visit, invest in or buy in Morocco, and not just recommend it to others.

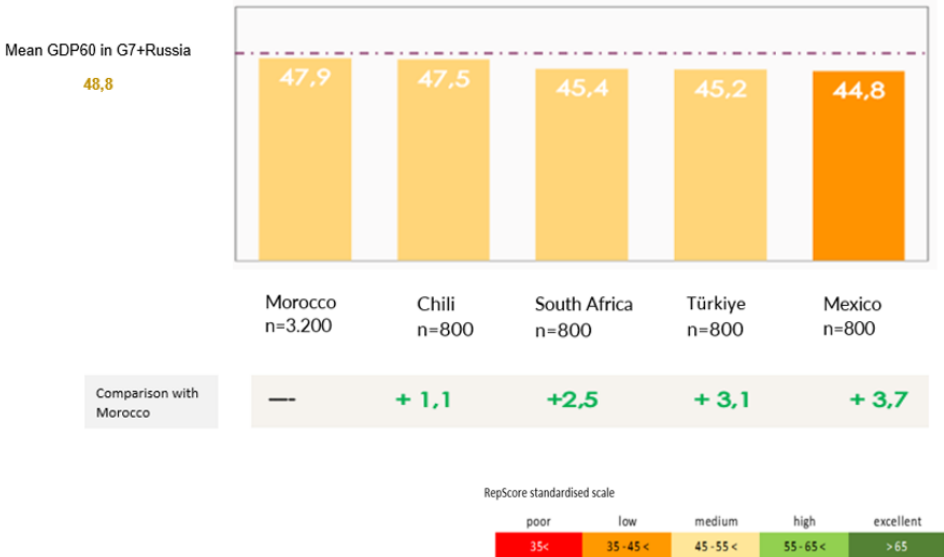
These three support intentions exhibit similar patterns to "equivalent" recommendations: relative to the average of all 60 countries evaluated, Morocco has a comparative advantage as regards intentions and recommendations to visit. This is not the case for intentions and recommendations to invest in Morocco or to buy its products.

Moroccans surveyed strongly recommend Morocco in 2023, more so than respondents from G7 countries+Russia, across all behaviors and support intentions.

Comparing Morocco with South Africa, Chile, Mexico and Turkey

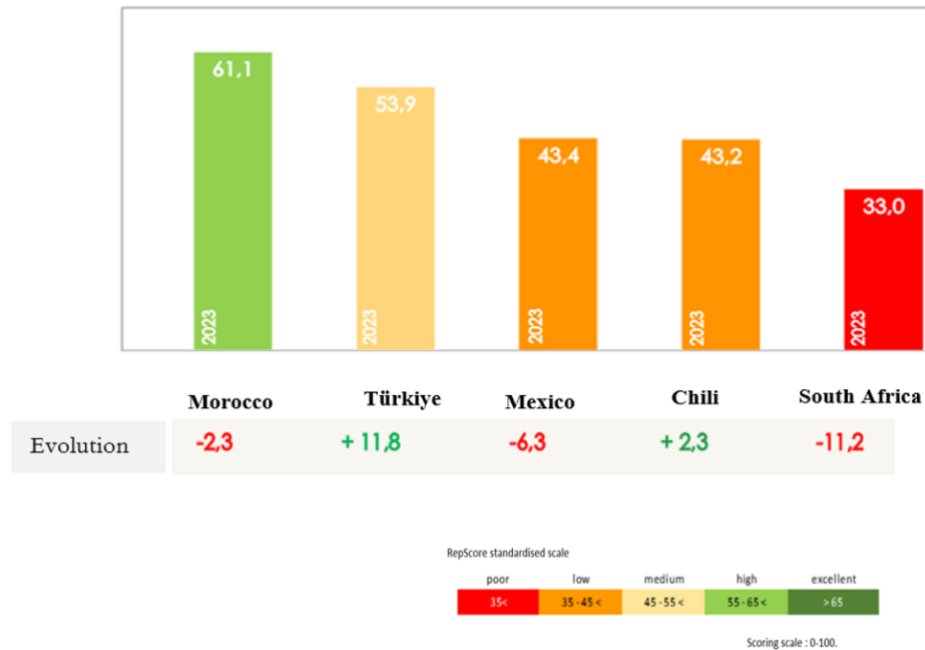
As in previous editions, Morocco clearly stands out from Turkey, South Africa and Mexico in terms of reputation in G7 countries+Russia, both overall and by attribute. It retains a comparative advantage over Chile in 2022.

Morocco's reputation in G7 countries + Russia vs. benchmark countries



Moroccans' perception of the reputation of the countries in the benchmark in 2023 knew a significant upward uptick for Turkey (+11.8 points). Conversely, South Africa's reputation in Morocco dropped by 11.2 points, bringing it to a very low level.

Moroccan and benchmark countries' reputations between 2022 and 2023 (as perceived by Moroccans surveyed)



Finally, in terms of supportive behavior, citizens of G7 countries+Russia recommend Morocco over South Africa, Chile, Mexico and Turkey.

The impact of the 2022 Football World Cup on Morocco's reputation

Morocco's national soccer team performed exceptionally well at the World Cup in Qatar, reaching the semi-finals. Morocco became the first Arab and African team to reach this stage of the competition.

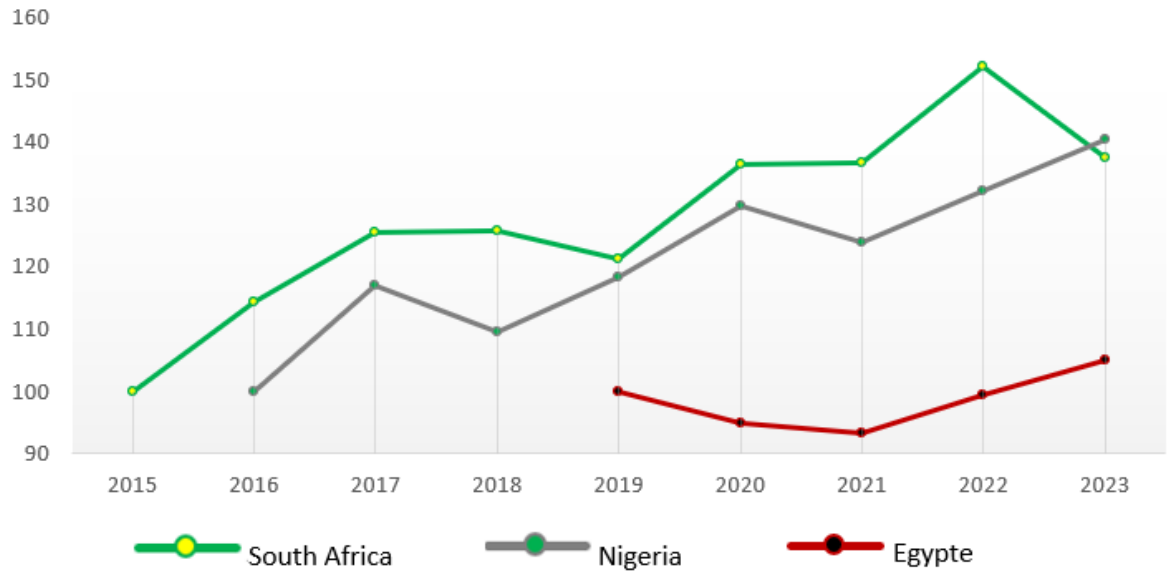
Over and above the sporting performance, Team Morocco's state of mind and values conveyed (mutual aid, hard work, courage, family ties, etc.) had a positive impact on Morocco's external reputation index in G7 countries+Russia: respondents with a high level of interest in the global competition gave Morocco a score of 52.1 points, compared to 43.1 points for those with no interest at all, a 9-point differential.

The effect of the World Cup was also felt in the perception of Morocco's on the "Sporting success" attribute in specific countries, such as Spain (+7.1 points), Egypt (+6.7 points) and Algeria (+5.5 points), as well as among Moroccans themselves (+9.5 points).

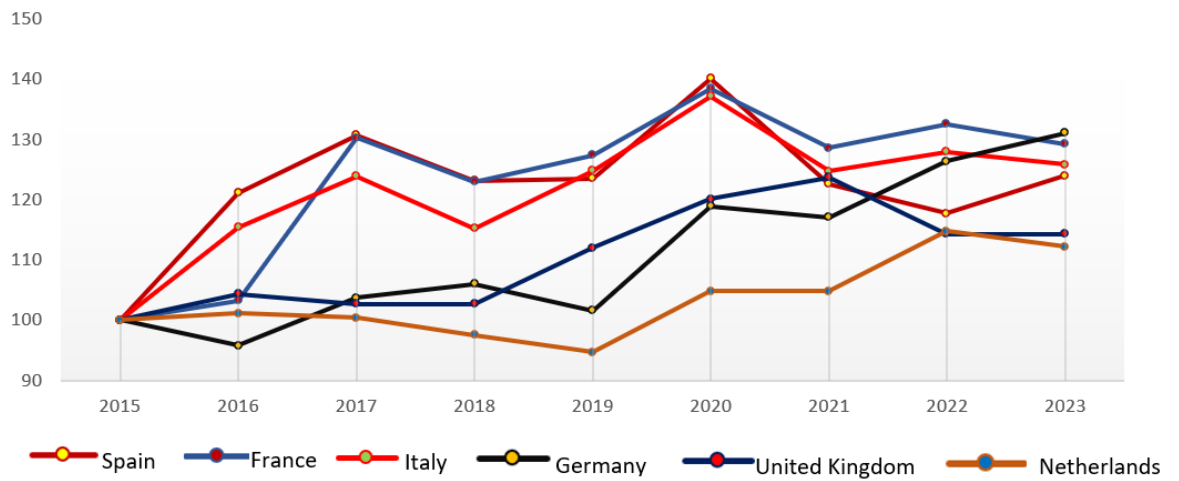
Nevertheless, it is worth noting that while sporting performance can contribute to a country's reputation, it is not a key element in building that reputation. Despite winning the World Cup, Argentina knew a significant drop in its external reputation indicator in 2023 (-2.2 points). Similarly, the external reputation of France, a runner-up in the competition, deteriorated by 2.2 points. Qatar's, the World Cup host country, dropped, as previously mentioned, by 4.1 points.

Appendix 1: Morocco's reputation between 2015 and 2023

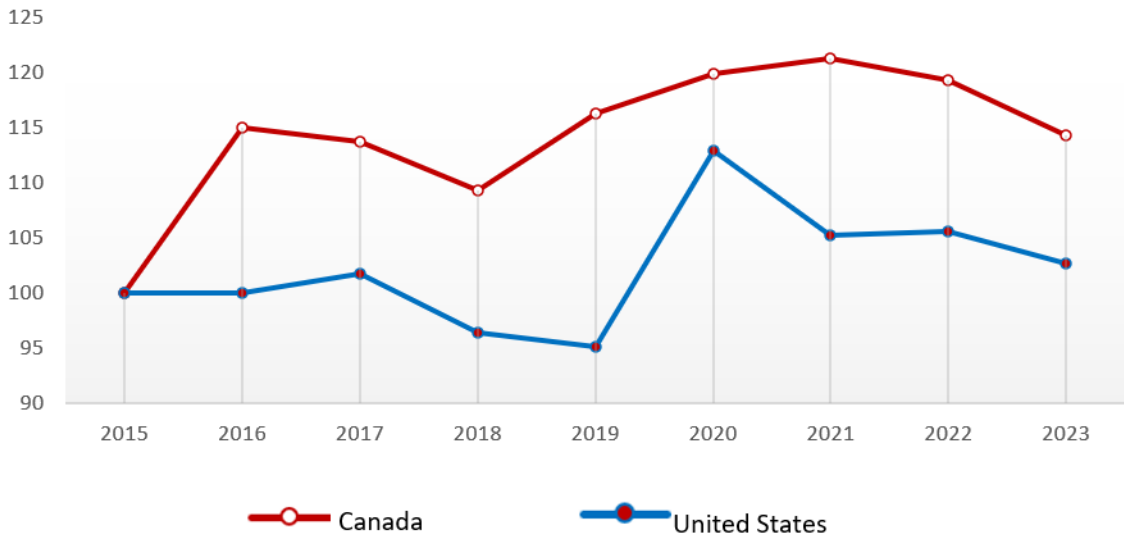
African countries (Base 100: 2015 for South Africa; for Nigeria, Base 100: 2016; for Egypt, Base 100: 2019)



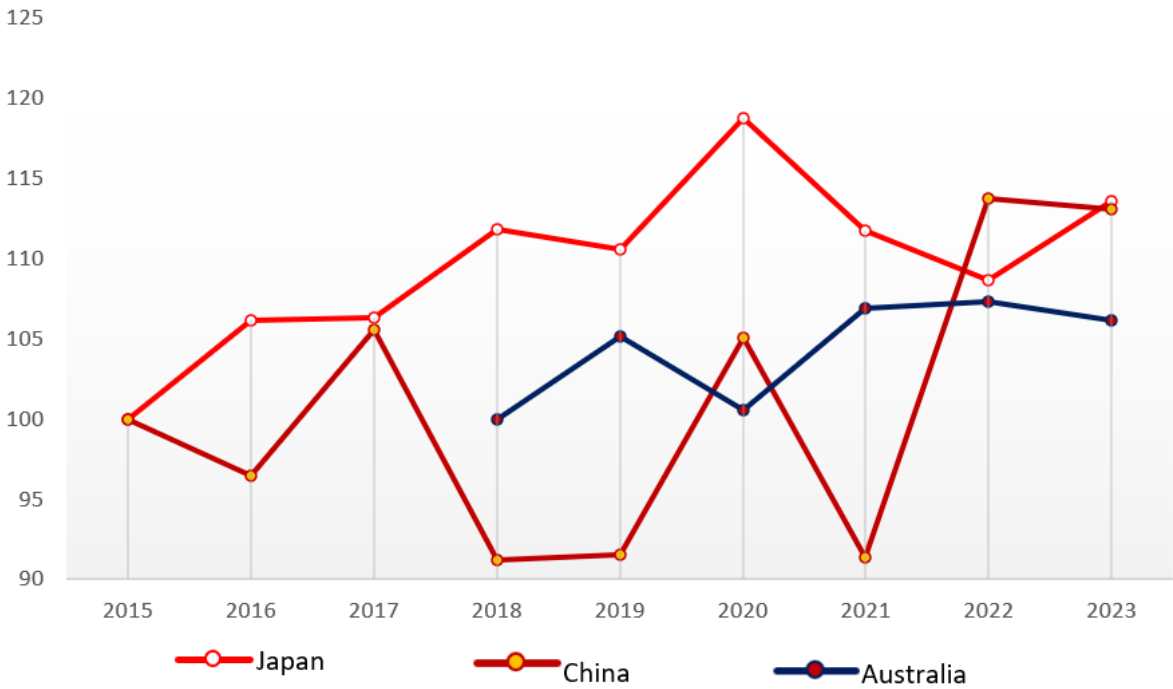
Europe (Base 100 : 2015)



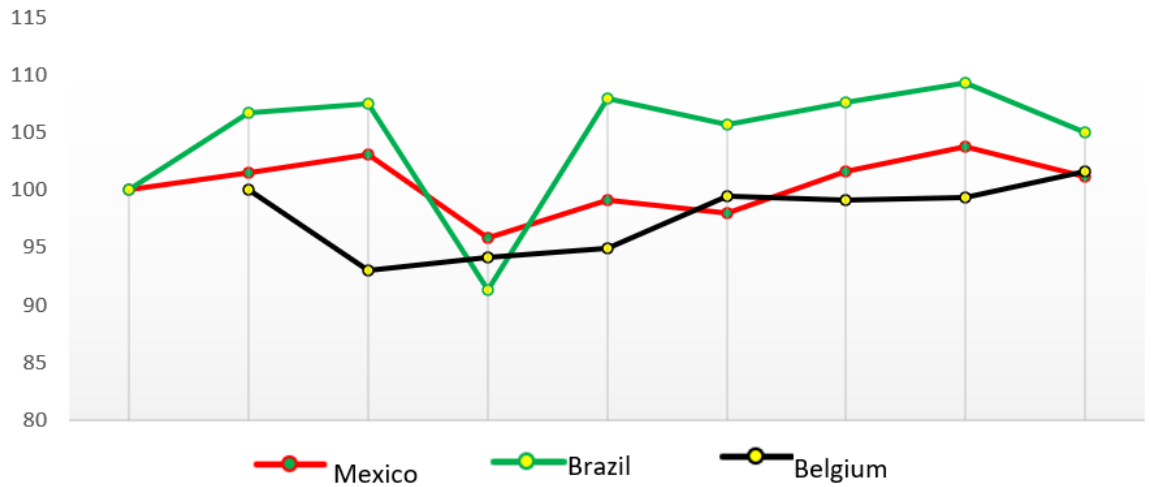
North America (Base 100 : 2015)



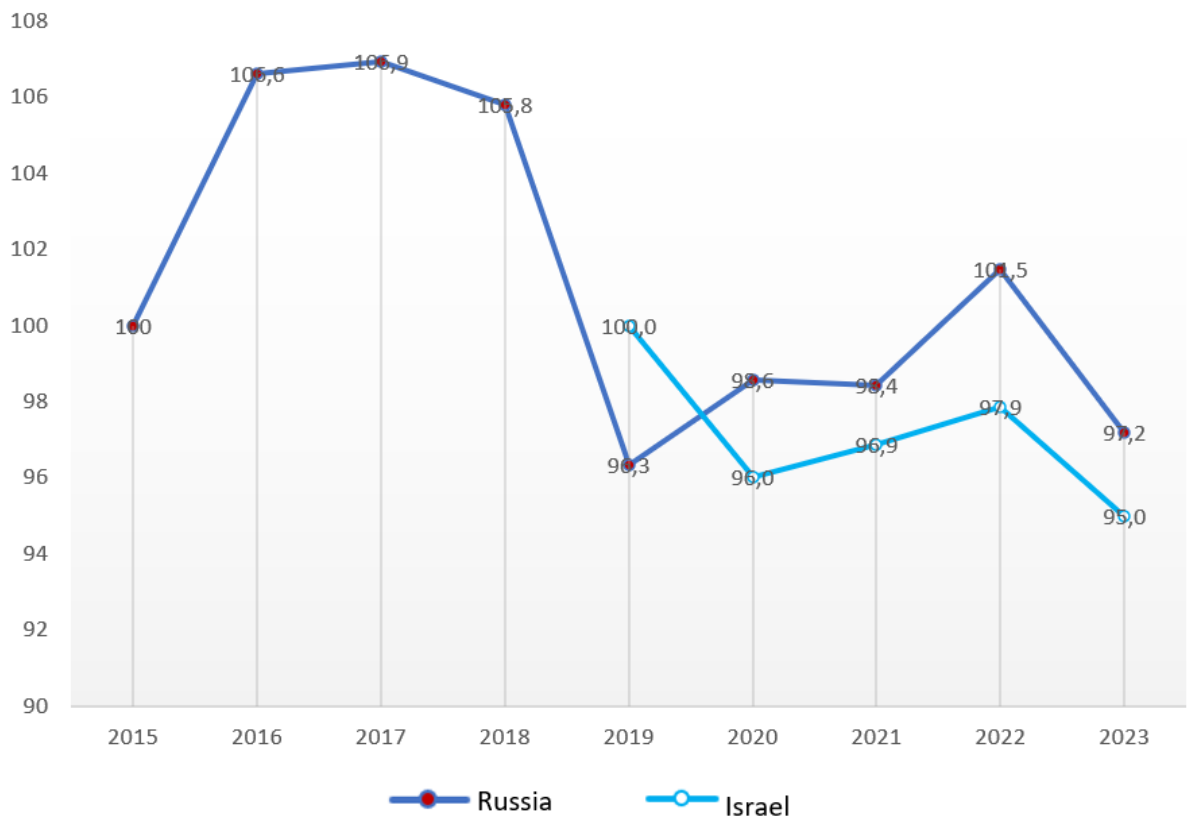
Asia & Oceania (China and Japan, Base 100 : 2015; Australia, Base 100 : 2018)



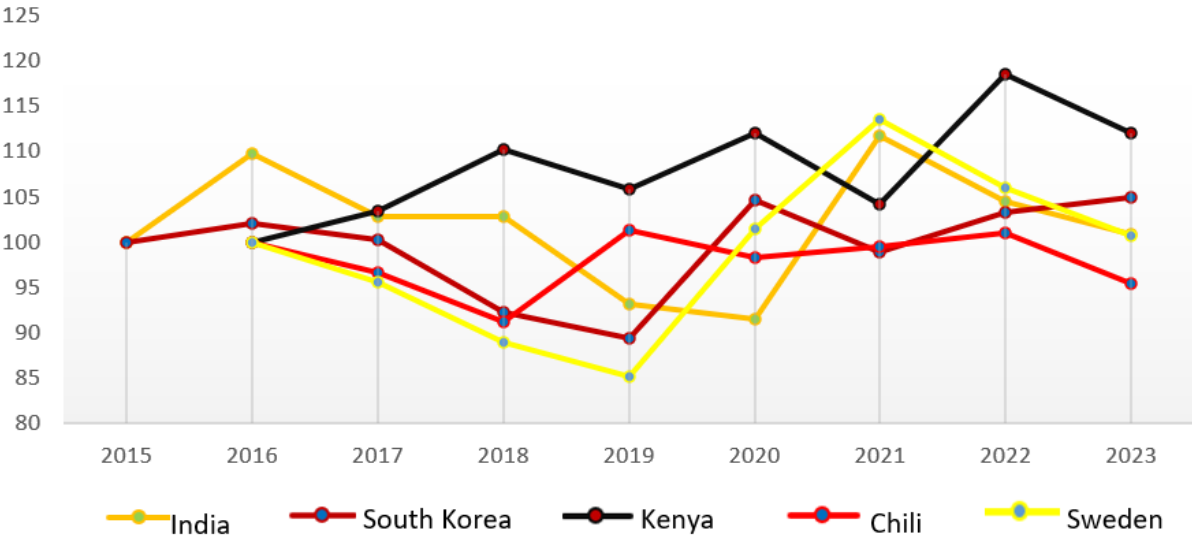
Countries where Morocco's reputation showed a steady trend between 2015 and 2023 (For Mexico and Brazil, Base 100: 2015; For Belgium, Base 100: 2016)



Countries where Morocco's reputation showed a downward trend between 2015 and 2023 (For Russia, Base 100: 2015; For Israel, Base 100: 2019)

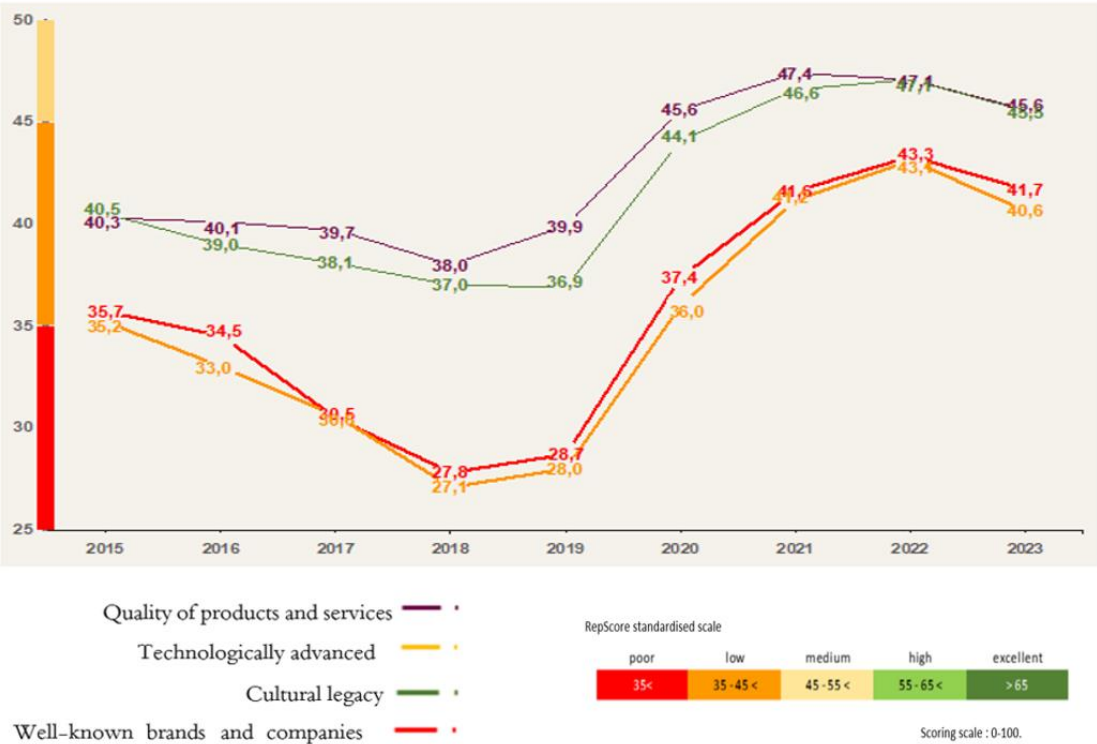


Countries where Morocco's reputation experienced a contrasting trend between 2015 and 2023 (For India and South Korea, Base 100: 2015; For Kenya, Chile and Sweden, Base 100: 2016)



Appendix 2: Trends in Morocco's external reputation (G7 countries+Russia) from 2015 to 2023 on various attributes

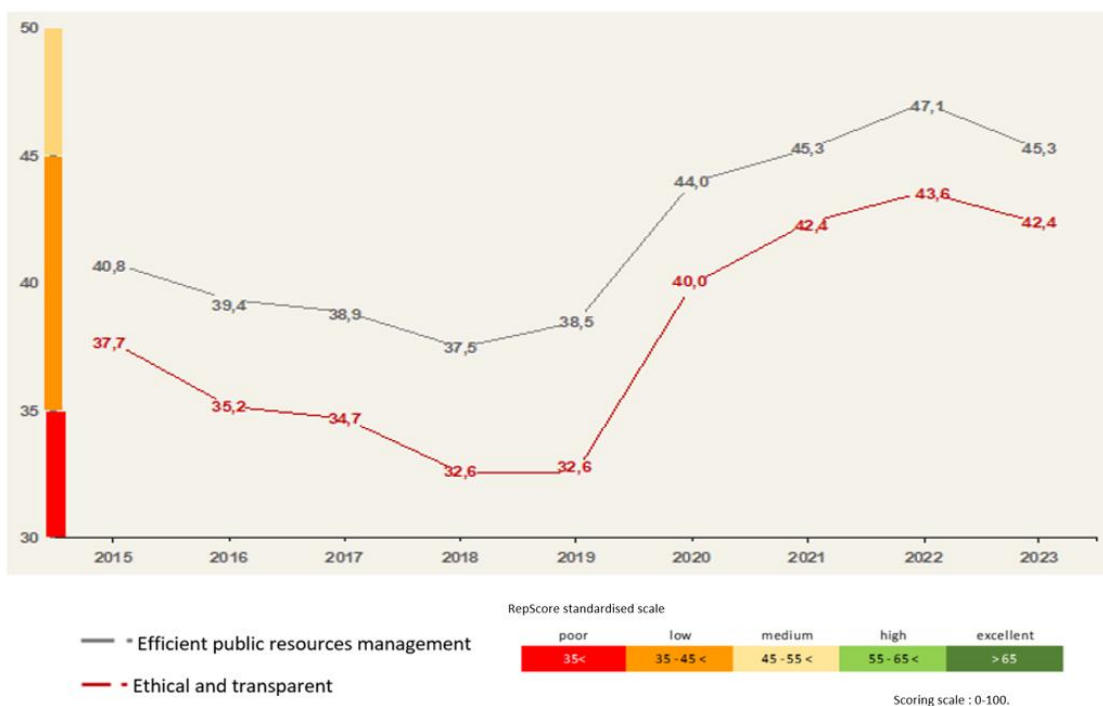
“Level of Development” dimension



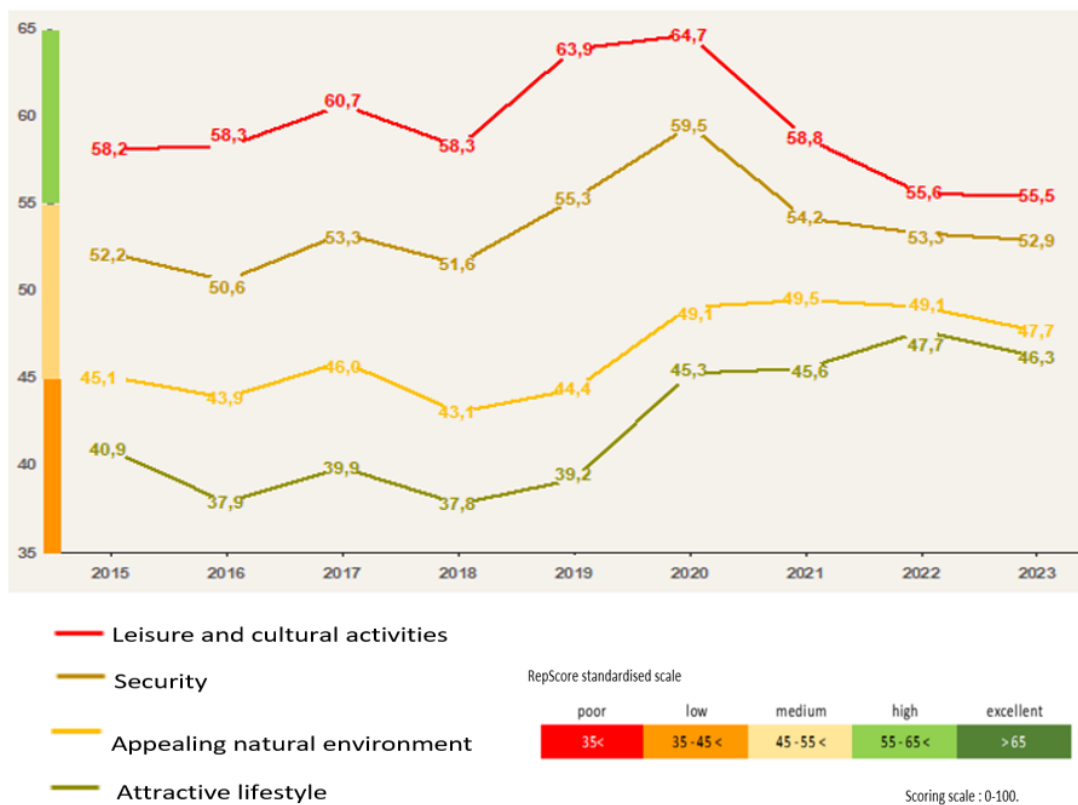
“Institutional Quality” dimension



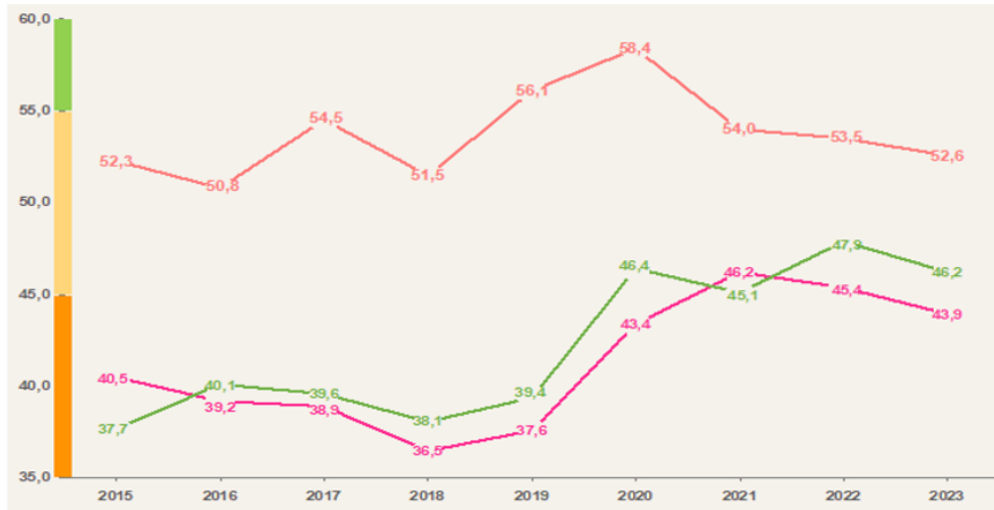
"Ethics and Responsibility" dimension



"Quality of Life" dimension

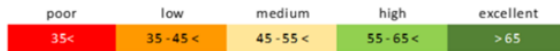


"Human Factor" dimension



- Quality education system
- Educated people
- Friendly people

RepScore standardised scale



Scoring scale : 0-100.