

MOROCCO'S GLOBAL REPUTATION IN 2022

Summary

The Royal Institute for Strategic Studies (IRES), in partnership with global nation-branding consultancy *Reputation Lab*, produced the eighth edition of Morocco's global reputation survey as part of the Observatory of Morocco's international image operations, commenced in 2015.

The survey was conducted in March and April 2022, against a geopolitical backdrop of persistent health crisis and outbreak of armed conflict in Ukraine. Sample survey sizes for country where Morocco's reputation is assessed were expanded, increasing survey result quality.

With Algeria added in 2022, the survey sample now covers 26 countries, including all G7+Russia countries, as well as 18 developed and/or emerging countries from all global geographies.

The eighth edition of the study of Morocco's global reputation introduced a number of additional attributes, including *Respect for Human Rights*, *Protection of the Environment* and *Efforts to Combat Climate Change*. The *Culture* attribute was split into two, namely *Cultural heritage* and *Sports excellence*. The *International respect* attribute was replaced by the following two attributes: *Engagement with the international community* and *Respected leaders*.

The methodology, introduced in 2022, bundles the 22 attributes into five categories as follows: *Quality of Life*, *Level of Development*, *Institutional Quality*, *Human Factor*, and *Ethics and Responsibility*.

Morocco's external reputation

In 2022, Morocco ranked 32nd out of 72 countries on reputation among G7+Russia countries. The Kingdom rejoices a generally positive global image, as it did in previous editions.

Countries with a strong external reputation include Switzerland, Scandinavian countries, New Zealand, Australia and Canada. Countries at the bottom of the ranking include Russia, Iraq, Iran, Pakistan, China, Saudi Arabia, Ethiopia, Nigeria, Nicaragua, Colombia, Bangladesh, Algeria and Venezuela.

Morocco's reputation among the G7+Russia countries is on par with that of the United States and Indonesia. It outranks that of South Korea, Vietnam, Chile, and the BRICS, and surpasses that of Turkey and all African and Arab countries.

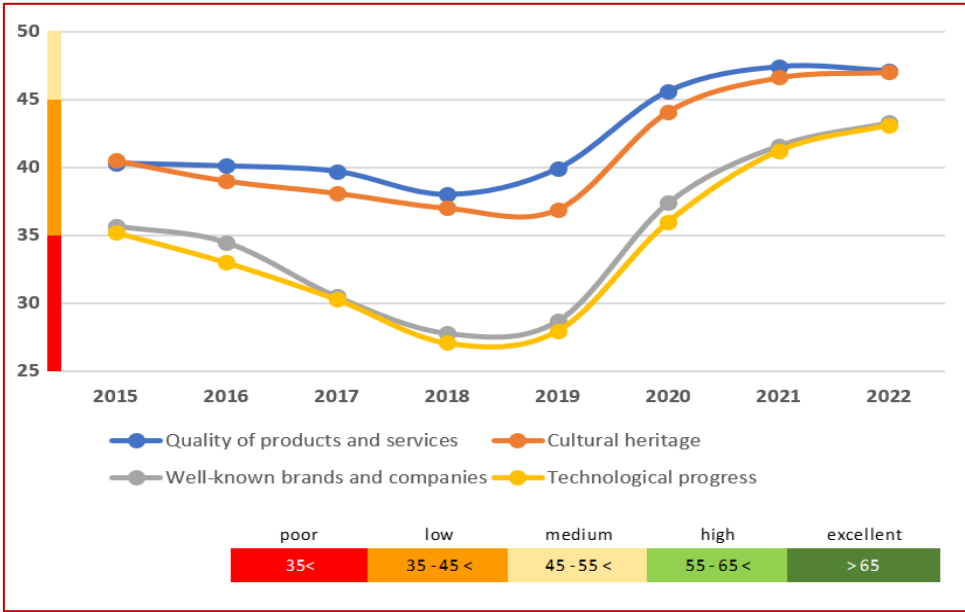
Morocco's reputation has improved significantly between 2021 and 2022 in China (+12.6 points), Kenya (+6.9 points), the Netherlands (+6.3 points), South Africa (+5.9 points) and Germany (+5.7 points). Conversely, it has dropped in the UK (-5.4 points), India (-4.8 points), Turkey (-3.4 points) and Sweden (-3.4 points).

Morocco's strengths in terms of external reputation reside in *Quality of life* and *Human factor* categories, at the exception of *Quality of the education system* attribute. Specifically, *Safety*, which falls under the *Quality of Life* category, remains a major asset for Morocco's reputation.

Morocco's external reputation is generally favorable under attributes newly introduced in 2022, i.e., *Environmental Protection* and *Fight against Climate Change*.

Significant headway has been made as of 2019 on Morocco's reputation in G7+Russia countries on *Level of Development*, *Institutional Quality* and *Ethics and Accountability*. These categories, whose weight in the reputation index grew substantially since 2019, contribute further to shaping Morocco's image profile, traditionally primarily based on aspirational values. This creates favorable prospects for enhancing the Kingdom's external reputation.

Evolution, between 2015 and 2022, of Morocco's external reputation in the G7 countries and Russia, under the attributes of the dimension "Development level"



Ratings remain generally less favorable on attributes inherent to the country's technological capacity, business and brand recognition, ethics and transparency, and respect for human rights.

Reputation on *Natural Environment*, *Leisure and Entertainment* as well as on *Friendly and Amiable Population* attributes continues on the downward momentum started in 2020. One explanation to this, may be that Covid-19 profoundly altered citizen expectations in G7+Russia countries. The focus there has shifted to rational aspects pertaining to development of life sectors rather than aspirational ones.

Looking back in time, Morocco's external reputation trended positively overall between 2015 and 2022 in Germany, France, Italy, Canada, Australia, Japan, and the Netherlands. In Africa, Morocco's image improved in South Africa and Nigeria.

In the UK, after trending upward from 2015 to 2021, Morocco's reputation paradoxically dipped in 2022.

Morocco's reputation in Chile, Mexico, and Brazil remained stable over the same period. However, a mixed bag emerges in other countries sampled in this study.

Morocco's domestic reputation

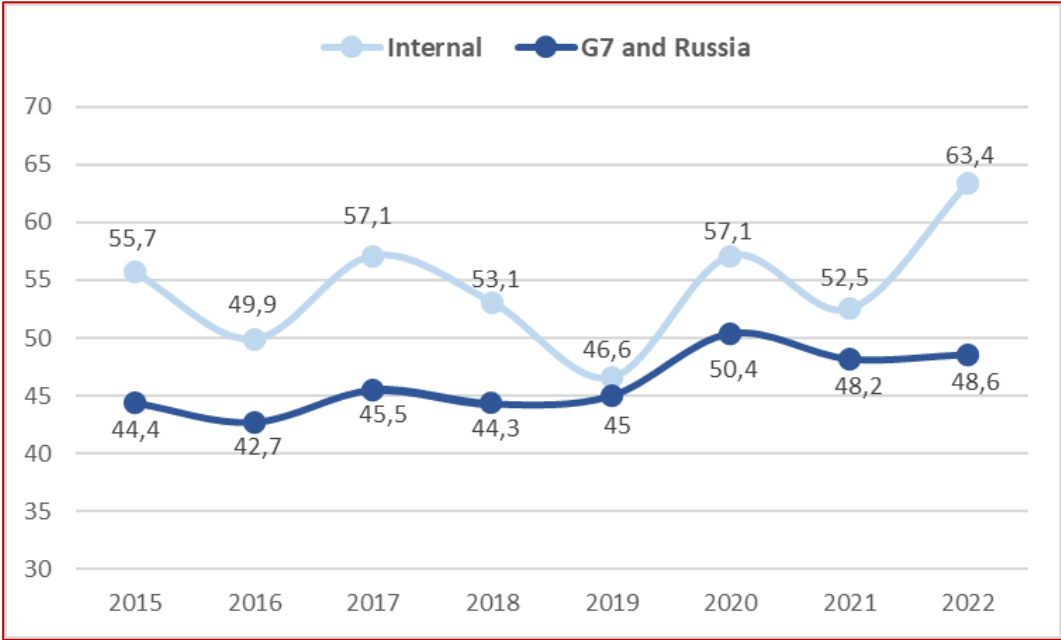
Morocco's domestic reputation, consisting of Moroccans' overall perceptions of their own country, has improved considerably (+10.9 points) between 2015 and 2022, moving for the first time since survey inception in 2015, from mid-range to high levels of reputation. This may be attributed to the significant diplomatic successes of 2022 under His Majesty King Mohammed VI's leadership, translating to a stronger sense of national pride among Moroccans.

The sharp rise in Morocco's domestic reputation between 2021 and 2022 is broadly based. Most notably, attributes such as *Efficient use of public resources*, *Well-known brands and companies*, *Technological advancement*, *Institutional and political environment* and *Quality of education system* rose by over 20 points.

Still, all eight survey editions show that the internal reputation of Morocco ebbs and flows almost annually, depending heavily on changes in Moroccans' perceptions of their country's institutional and political environment.

In 2022, Morocco's internal reputation index outpaced that of its external reputation by 14.8 points. The gap is the widest it has been since 2015.

Evolution, between 2015 and 2022, of Morocco's internal reputation, compared to its external reputation in the G7 countries and Russia



Moroccans surveyed are more likely than residents of G7+ Russia countries to believe they live in a country that is safe, has friendly and likeable people, and boasts a rich cultural heritage. They consider Morocco to be truly engaged with the international community on crucial issues facing humanity and active in protecting human rights, the environment and the fight against climate change.

Conversely, Moroccans are more critical of their country than foreigners on the following five attributes: *efficient use of public resources, ethics and transparency, institutional and political environment, social welfare, and quality of education system.*

Supportive Behaviors in Morocco

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

Morocco continues to be perceived by G7+Russia nationals as a country to visit and possibly attend events and purchase products and services. Despite some progress, this willingness does not go align with equal intensity to studying in Morocco.

Between 2021 and 2022, aside from recommendations to work and study in Morocco, which are flat, overall supportive behavior declined.

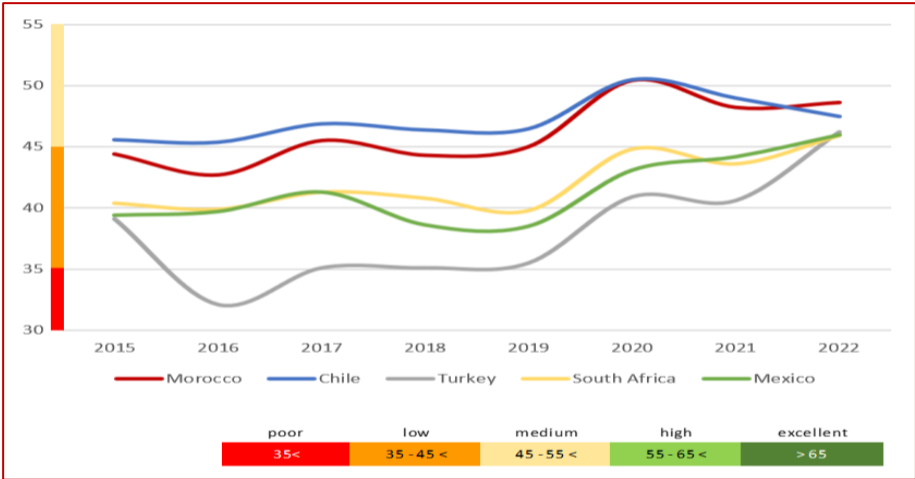
The Kingdom is perceived as more of a tourist destination and a place for rest and recreation than an economic player in comparison to global averages.

Similar to rational attributes, support behaviors by Moroccans for their country are substantially more positive than those by G7+Russia nationals. The most notable differences are in recommendations to invest, live, and host or attend events in Morocco.

Comparing Morocco with Turkey, South Africa, Mexico and Chile

Morocco's reputation in G7+ Russia countries is well ahead of that of Turkey, South Africa and Mexico. Its external reputation in 2022 surpasses that of Chile for the first time since 2015.

Evolution, between 2015 and 2022, of Morocco's reputation and its benchmarks in the G7 countries and Russia



The Kingdom holds comparative advantages, in terms of reputation in G7+Russia countries, over the four countries mentioned above, notably, along the following criteria: Ethics and transparency, respect for human rights, the fight against climate change, efficient use of public resources, security, lifestyle, institutional and political environment, business environment and engagement with the international community.

In terms of supportive behavior, respondents from G7+Russia countries put Morocco on a par with Chile. They recommend the Kingdom over South Africa, Mexico and Turkey. The latter ranks higher than Morocco only on the recommendation to visit the country.

Recommendations

Considering the above, and to substantially improve Morocco's internal and external reputation, particularly on the *Level of Development* category, the Kingdom should undertake wide-ranging reforms in education, innovation and technology, brand equity, and product and service quality, alongside large-scale economic revitalization projects, universal social coverage, and public sector restructuring, in light of the health crisis.

In a challenging geopolitical context, shaped by accelerating rivalry for leadership between traditional and emerging powers, Morocco stands to benefit from an international positioning strategy based on the following two guiding principles:

❖ **Build a unique, strong and sustainable Morocco Brand**

- Base this Morocco Brand on clear, simple and differentiated content, built around both aspirational and rational values. Aspirational values relate among other things, to natural environment, population friendliness and lifestyle. Rational values are more concerned with business environment, quality of institutions and technological progress. This means promoting the image of a modern Morocco, with solid institutions and responsible behavior, enhancing the Kingdom's international credibility.
- Create a flexible and efficient structure to promote Morocco's image internationally, to pool the efforts of all stakeholders. This body needs to be positioned effectively given its cross-functional nature, especially as its activity requires continuity, long time vision, and effective coordination of short- and long-term activities at both macro and micro levels.

❖ **Adopt a targeted and consistent strategic communication policy**

- Differentiate the country communication approach to combat often negative stereotypes and prejudices and enhance the Kingdom's visibility abroad: The level of awareness of Morocco among citizens surveyed in the G7+Russia countries remains below global averages (75%) although it went from 40% in 2017 to 69% in 2022, providing a communication opportunity for the Kingdom to enhance its external reputation.
- Constantly promote Morocco's influence abroad specifically through creating an English-language public television channel broadcasting internationally, mobilizing the scientific and artistic capacities of the Moroccan diaspora and entering partnerships with domestic and foreign influencers.