



## Morocco's Global Reputation in 2024

### Summary

As part of the work conducted by the Observatory on Morocco's International Image, established in 2015, the Royal Institute for Strategic Studies (IRES) has produced the tenth edition of the global survey on Morocco's reputation.

This survey was conducted on behalf of IRES by "Reputation Lab", an international firm specializing in Nation Branding, during the period from March to April 2024. It took place in a global context marked by ongoing conflicts in Europe, notably between Russia and Ukraine, as well as in the Middle East with the War in Gaza. Additionally, the anticipation surrounding the upcoming United States presidential election has contributed to heightened uncertainty on the international stage.

In 2024, Morocco's reputation was assessed in 26 countries, a notable increase from the 18 countries evaluated in 2015. These countries are as follows:

- From Africa: South Africa, Algeria, Egypt, Kenya and Nigeria;
- From Europe: Germany, Belgium, Spain, France, Italy, the Netherlands, the United Kingdom and Sweden;
- From America: Brazil, Canada, Chile, the United States and Mexico;
- From the Middle East: Israel and Turkey;
- From Asia and Oceania: Australia, China, South Korea, India, Japan and Russia.

The new "RepCore Nations" methodology, adopted in 2022, has made it possible to classify the 22 attributes (rational levers), which make up the "RepScore" reputation index, according to the following five dimensions: Institutional quality, Quality of life, Level of development, Human factor, and Ethics and responsibility.

## RepCore® Nations, a country reputation management tool



### External reputation worldwide: a global overview

The analysis of the reputation of the 60 countries with the highest GDP from 2023 to 2024 reveals relative stability. While the average "RepScore" reputation index for G7 countries, including Russia, experienced a slight decline of 0.6 points in 2023, this was balanced by an increase of 0.5 points in 2024.

In 2024, Switzerland maintained its position as the country with the strongest external reputation, as it did in 2023, followed by Norway, Sweden, New Zealand, and Canada. Denmark, Australia, Ireland, Finland, and Austria also ranked among the top in terms of external reputation.

Conversely, the countries with the lowest external reputation scores for both 2023 and 2024 include Russia, Iraq, Iran, Pakistan, China, Israel, Saudi Arabia, Colombia, Nigeria, Bangladesh, and Algeria.

Among the 60 countries with the highest GDP, Ethiopia, Thailand, and Peru showed the most significant improvements in external reputation between 2023 and 2024.

On the other hand, Israel and Ukraine saw the most notable declines in their reputation index. In Israel's case, this decline was attributed to humanitarian violations in Gaza, which were received negatively by the international community. For Ukraine, the waning empathy from observers, following two years of conflict, contributed to the decrease in its reputation after an initial surge of support following the Russian invasion.

### **Morocco's international positioning is relatively favorable in terms of its external reputation**

In 2024, Morocco demonstrated an improvement in its external reputation index, recovering from the general downward trend experienced in 2023. Among the G7 countries and Russia, Morocco ranked 30th out of the 60 countries with the highest GDP, moving up four positions compared to the previous year. Despite this positive development, the Kingdom's external reputation remains moderate, with a score of no more than 50 points out of 100.

Morocco's standing is comparable to that of Hungary and the Philippines and is notably stronger than that of the United States, Argentina, all African and Arab countries, as well as members of the BRICS+ group, excluding Brazil.

In 2024, Morocco maintained a favorable reputation in key countries such as Egypt, Australia, China, Germany, France, Mexico, the UK, and the USA. On the other hand, the Kingdom's reputation was weaker in Israel, Spain, Algeria, and paradoxically, Turkey.

Between 2023 and 2024, Morocco's reputation improved in several African countries, including South Africa (+7.2 points), Kenya (+3.3 points), and Nigeria (+3.3 points). Similarly, it saw gains of 3.6 points in Sweden and 2.7 points in China, South Korea, Mexico, and the Netherlands. However, the Kingdom's reputation declined sharply in Turkey (-4.0 points) and Israel (-8.7 points).

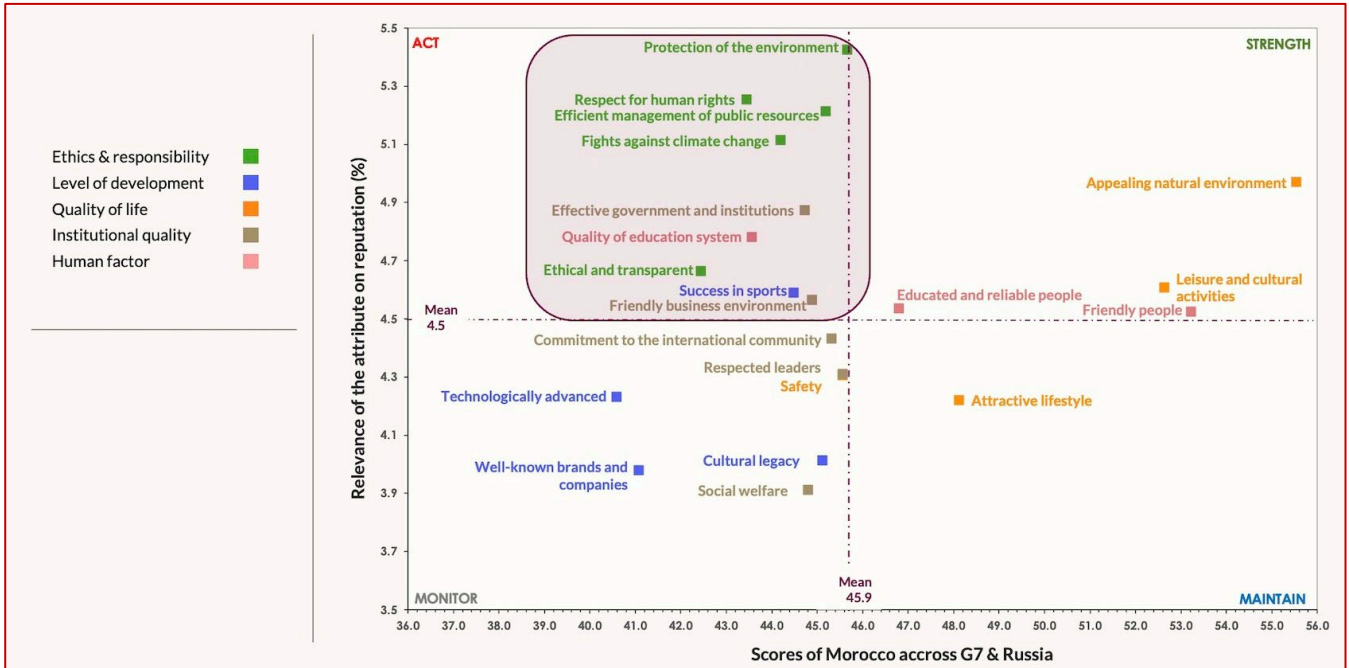
### **The external reputation continues to be shaped more by "aspirational" perceptions rather than rational values**

Morocco's strengths in terms of external reputation among G7 countries and Russia remain centered around the dimensions of "Quality of Life" and the "Human Factor," with the exception of the "Quality of the Education System" attribute. Key positive attributes include a "Friendly and sympathetic population," an "Educated and reliable population," the "Natural environment," "Leisure and entertainment," an "Attractive lifestyle," and "Safety." These elements contribute significantly to the Kingdom's strong external reputation.

However, assessments remain less favorable for dimensions related to "Ethics and Responsibility," "Institutional Quality," and the "Level of Development." Specifically, attributes such as "Ethics and transparency," "Respect for human rights," the "Fight against climate change," the "Institutional and political environment," the "Business-friendly environment," and the "Efficient use of public resources" are areas where Morocco's reputation could improve, despite ongoing national efforts.

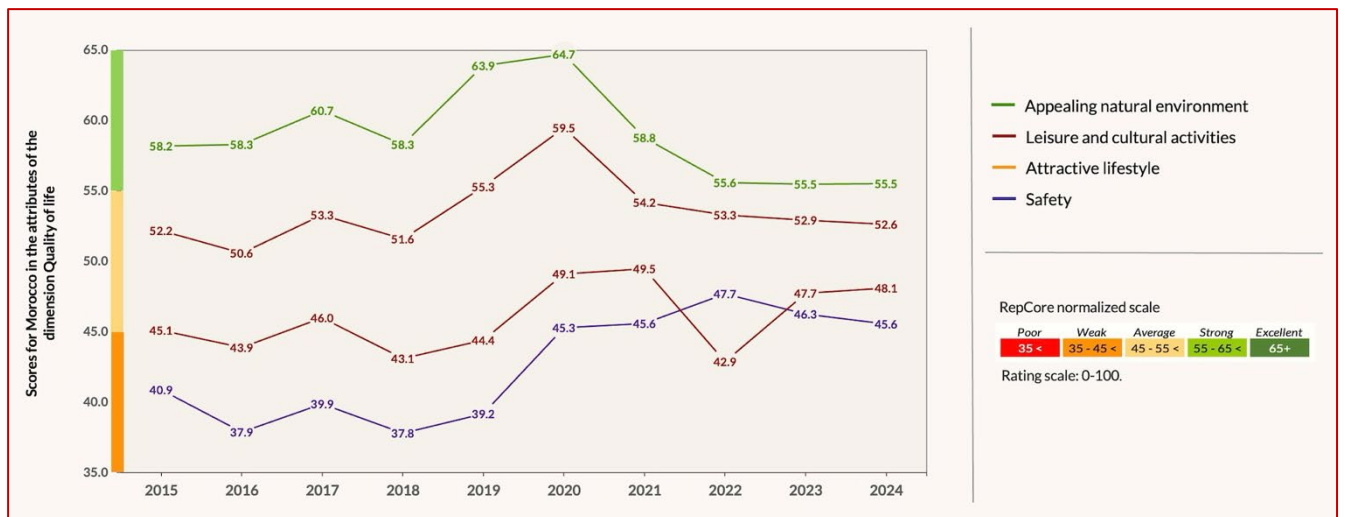
Additionally, attributes such as "Well-known brands and companies" and being "Technologically advanced" also hold importance. The latter, in particular, represents one of the lowest scores for Morocco's external reputation, despite the country's notable development in technology-intensive sectors like automotive and aeronautics.

## Strengths and weaknesses of Morocco

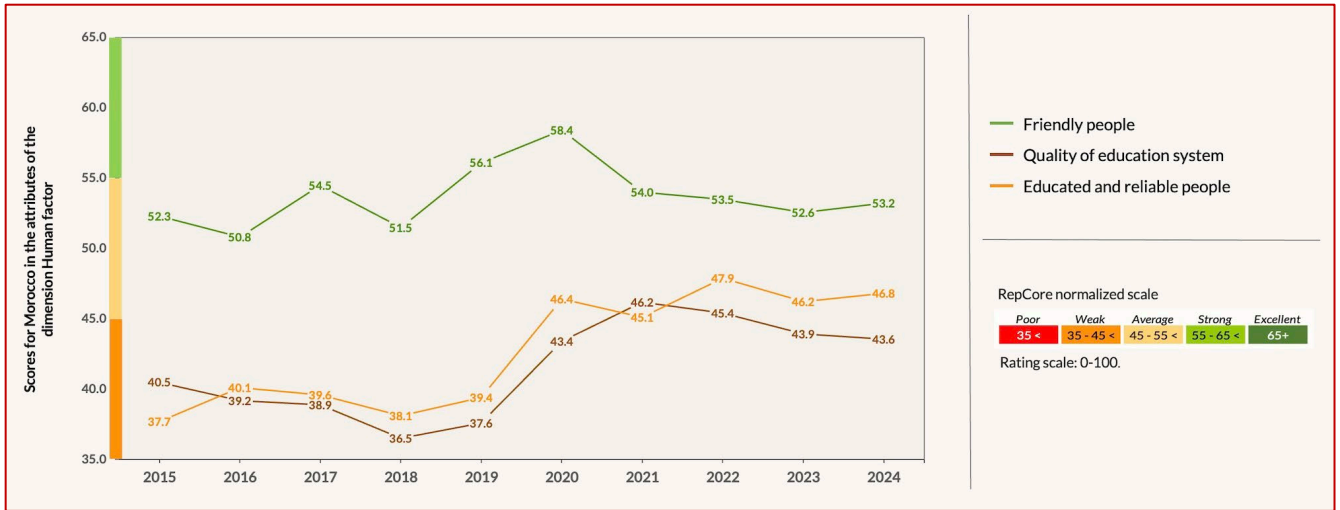


Between 2015 and 2024, most of the attributes shaping Morocco's external reputation experienced a generally positive trend.

## Evolution of the external perception of Morocco in the attributes of the dimension "Quality of life" dimension between 2015 and 2024

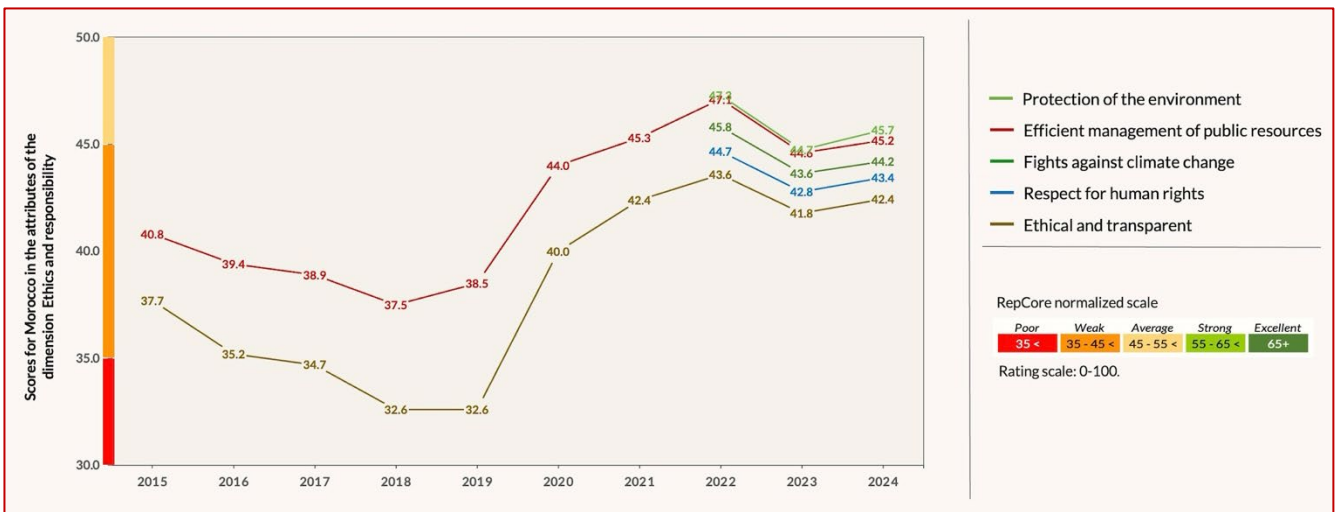


### Evolution of the external perception of Morocco in the attributes of the "Human factor" dimension between 2015 and 2024

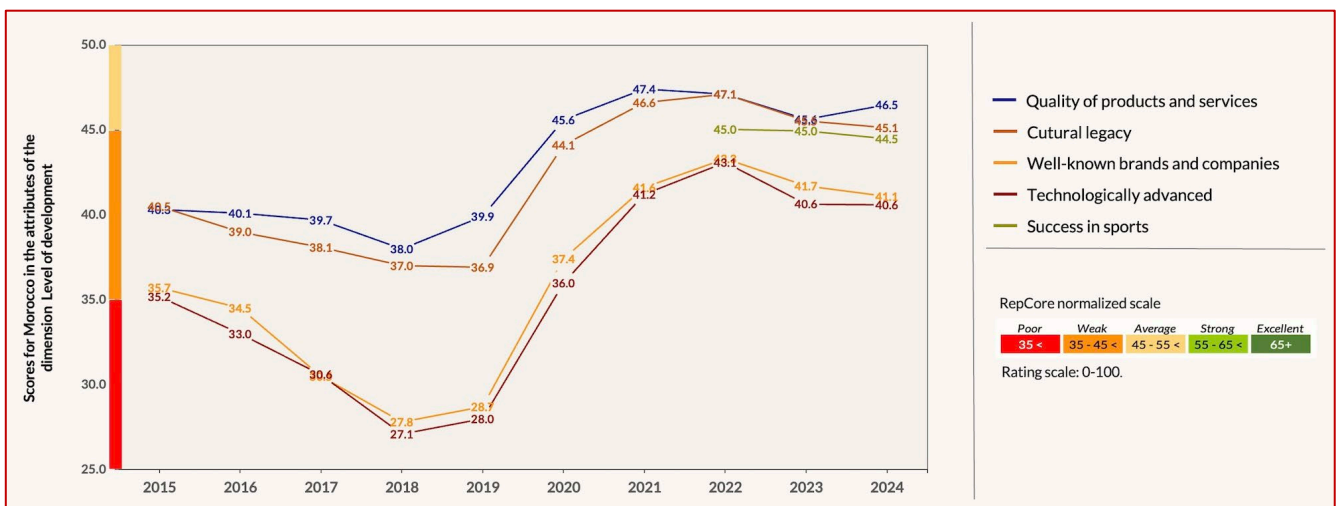


However, while attributes related to the "Level of Development," "Institutional Quality," and "Ethics and Responsibility" showed a sharp upward trajectory from 2019, these indicators have either stagnated or entered a downward trend more recently.

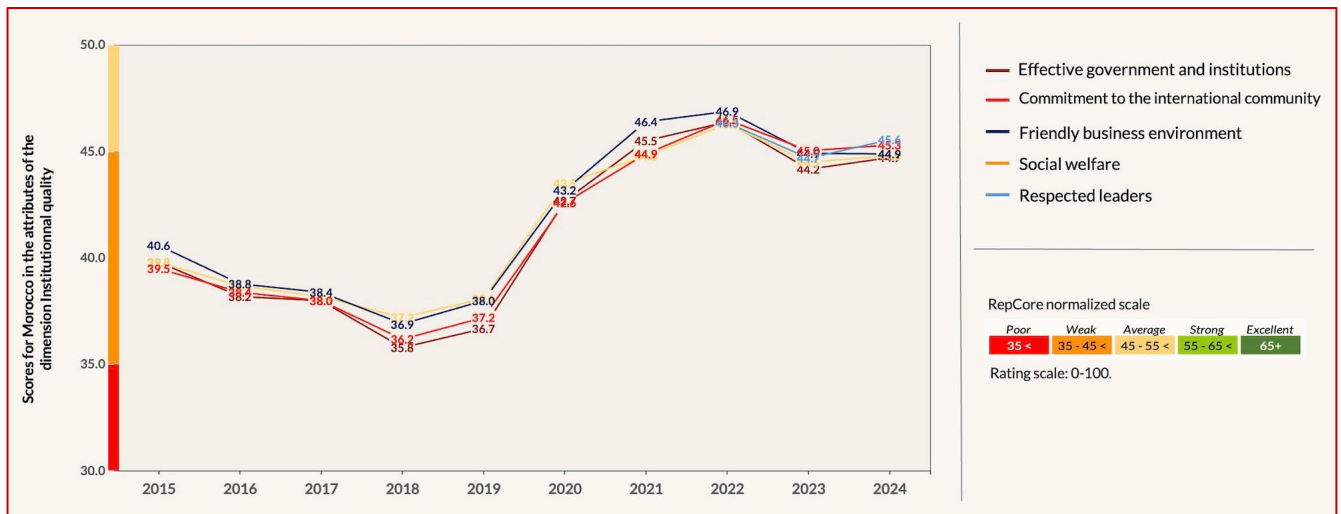
### Evolution of the external perception of Morocco in the attributes of the dimension "Ethics & responsibility" between 2015 and 2024



### Evolution of the external perception of Morocco in the attributes of the dimension "Level of development" between 2015 and 2024



### Evolution of the external perception of Morocco in the attributes of the dimension "Institutional quality" between 2015 and 2024



Finally, it is worth noting that the "Sporting Success" attribute, which saw an exceptional rise in the 2023 edition due to the national soccer team's remarkable performance at the 2022 World Cup, saw a slight decline in 2024.

### A strong but fluctuating internal reputation of Morocco

Based on the perceptions Moroccans hold of their country, the 2024 Internal Reputation Index ranks Morocco, as in previous years, among the nations whose citizens are the least critical of their homeland. The Kingdom attained a score of 64.8 points out of 100, an increase of 3.7 points from 2023, marking the highest internal reputation level since 2015.

In contrast to 2023, when the majority of attributes showed a decline, the 2024 results present a more nuanced picture. Notably, the dimensions of "Quality of life" and "Institutional quality" experienced significant improvements across all attributes, except for "Social well-being," which decreased by 0.5 points.

For the remaining three dimensions, the trend is more contrasted. While several attributes recorded declines, variables such as "Respect for human rights," "Friendly and sympathetic population," "Cultural heritage," and "Quality of products and services" rose by 2, 1.4, 1, and 0.6 points, respectively, compared to 2023.

The 2024 results for Morocco's internal reputation reaffirm the findings of the previous nine editions, underscoring an almost annual fluctuation, which is largely shaped by Moroccans' evolving perceptions of the country's institutional and political environment.

## **Seizing communication opportunities and monitoring reputational risks**

Moroccan citizens surveyed perceive their country as a safe place to live, with a favorable natural environment and friendly, sympathetic people, more so than residents of G7 countries and Russia. They believe that Morocco is actively engaged in defending key global issues, particularly environmental protection and the fight against climate change. Furthermore, Morocco is seen as having a rich cultural heritage, a business-friendly environment, high-quality products and services, and as a country making strides in the field of sports.

These perceptions present valuable communication opportunities that Morocco should leverage to build a strong foundation for its international image.

However, Moroccans are more critical than foreign observers when evaluating the efficiency of public resource management, the quality of the education system, the institutional and political framework, social well-being, and issues of ethics and transparency. These areas of concern could potentially undermine Morocco's reputation both internally and externally, posing significant challenges that must be addressed.

## **Morocco is recommended as a destination for tourism and the organization of international events, but not for studies and work**

Nationals of G7 countries, including Russia, perceive Morocco primarily as a destination for tourism, events, and the purchase of products and services. However, this enthusiasm is less pronounced when it comes to recommending Morocco as a place to live, study, work, or invest. This discrepancy does not align with the ongoing national efforts to strengthen university clusters and enhance the overall business environment.

Since the 2023 edition of the reputation survey, three new support intentions: "I would visit," "I would invest," and "I would buy" have been added to the existing seven support behaviors. These three support intentions exhibit trends similar to their corresponding recommendations.

Consequently, Morocco continues to be internationally viewed more as a tourist and event destination than as a hub for education, employment, or investment. On the other hand, domestic respondents in 2024 strongly recommend Morocco across all behaviors and support intentions.

Additionally, between 2023 and 2024, all national attitudes and support intentions showed positive growth, except the recommendation to study in Morocco, which declined by 0.6 points compared to 2023, continuing its downward trend from previous years.

## **A positive perception of the Royal Initiative for Atlantic Africa**

The 2024 edition of Morocco's Global Reputation Survey has incorporated questions regarding the Royal Initiative for Atlantic Africa to evaluate the international community's awareness and perception of this initiative, as well as its impact on Morocco's external reputation.

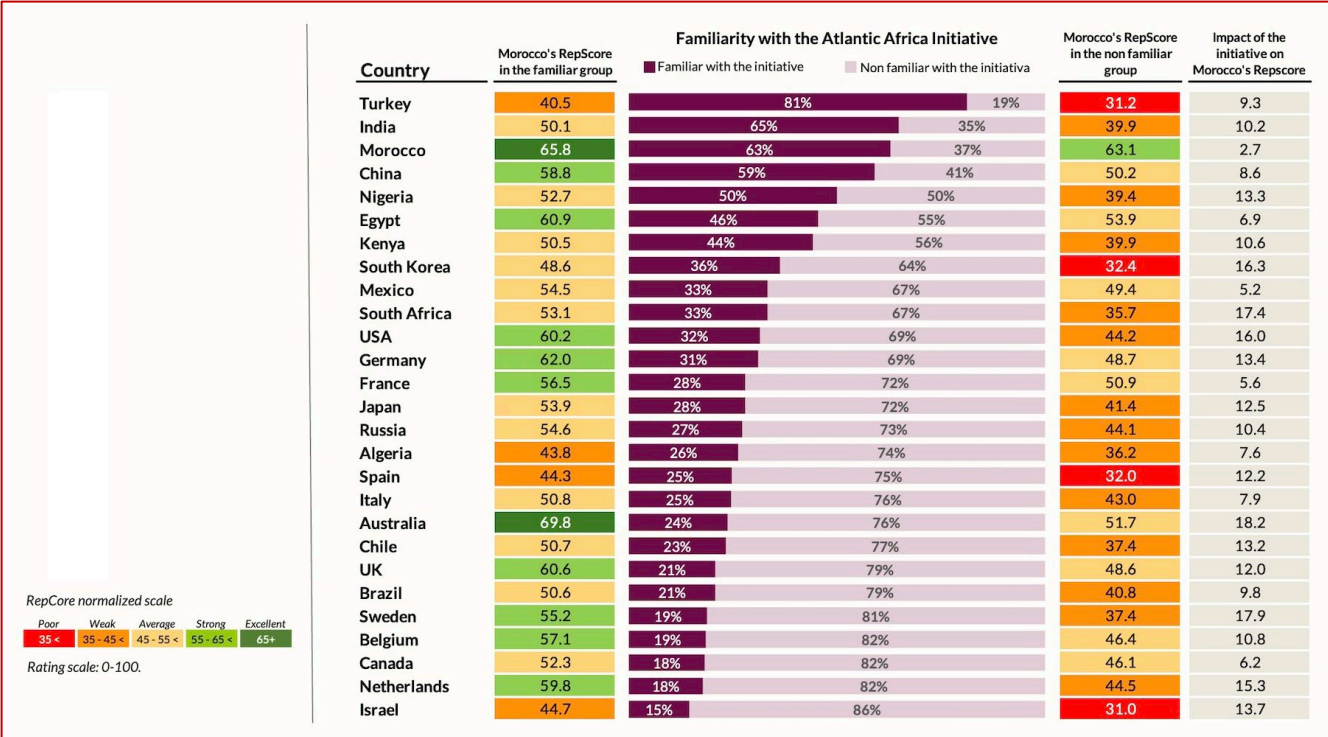
The survey indicates that awareness of the Royal Initiative for Atlantic Africa is notably high in Turkey, at 81%, while awareness in Nigeria, China, and India ranges from 50% to 65%. In Kenya and Egypt, awareness is at 45%, highlighting these countries' interest in the opportunities presented by the African continent. Conversely, awareness levels are significantly lower in the Netherlands, Canada, Belgium, and Sweden, where they fall below 20%.

In the context of the G7 countries and Russia, awareness is most pronounced in the United States (32%) and Germany (31%), followed closely by France and Japan (both at 28%), Russia (27%), Italy (25%), and the United Kingdom (21%). In Canada, awareness barely exceeds 18%.

Overall, perceptions of the Royal Initiative for Atlantic Africa are largely favorable across the 26 countries surveyed, with particularly strong positive views in Australia, Germany, the United States, the United Kingdom, and the Netherlands. In contrast, Algeria and Spain exhibit the lowest levels of perception regarding the Initiative.

Regarding the tangible impact of the Royal Initiative for Atlantic Africa on Morocco's external reputation, the outlook is promising. There exists a substantial positive difference in Morocco's external reputation index between respondents who are aware of the Initiative and those who are not. For instance, this difference is 18.2 points in Australia, 17.9 points in Sweden, 17.4 points in South Africa, 13.3 points in Nigeria, 10.6 points in Kenya, and 7.6 points in Algeria.

**Impact of the Royal Initiative for Atlantic Africa on Morocco's external reputation**





## **Change drivers needed to enhance the Kingdom's internal and external reputation**

In light of the above, and to significantly improve its internal and external reputation in the future, Morocco should undertake far-reaching reforms in the areas of "Ethics and Accountability", "Level of Development" and "Institutional Quality", particularly in the areas of ethics and transparency, respect for human rights, the institutional and political environment, the efficient use of public resources and the education system.

These three dimensions, which play an increasingly important role in building a country's reputation, need to be taken into serious consideration by Morocco if it is to upgrade its international image from an intermediate to a strong position.

The Kingdom should also adopt the following directions:

- Build a single, strong, and enduring "Morocco Brand" - which brings together all the commercial sector brands: in this regard, the study carried out by IRES in 2016 on this subject could serve as a useful starting point for the design of this brand.
- Adopt a targeted and coherent strategic communications policy, which requires the convergence of all the players involved in promoting the Kingdom's international image. The ten editions of the IRES survey on Morocco's external and internal reputation provide a wealth of information that can inform decision-making on the priority areas of action to target in terms of the structural reforms to be carried out and the communications policy to be implemented.
- Promote proactive cultural diplomacy, notably through the creation of a public television channel in English, which will carry Morocco's voice internationally, mobilize the scientific and artistic skills of Moroccans around the world, and forge partnerships with influencer consultancy agencies.