

Morocco's Reputation in the World in 2020

Executive Summary

Within the framework of the Observatory of Morocco's image, set up in 2015, the Royal Institute for Strategic Studies (IRES) has carried out, in partnership with the international firm "The Reprtrak Company", a world leader in the field of "nation branding", the sixth edition of the survey on Morocco's reputation in the world.

This investigation was carried out on a sample of 24 countries. It includes the countries of the former G-8 (G-7+Russia), which represent buoyant markets for Morocco's exportable offer and potential outbound markets of tourist flows and direct investments towards the Kingdom, as well as 16 developed and/or emerging countries, from the main regions in the world, which constitute a priority of Morocco's international positioning strategy.

The 2020 edition – the COVID-19 year – was marked by a very significant improvement in the Kingdom's external reputation, which had shown a stable trend over the 2017-2019 period. This allowed Morocco's external reputation to rise in 2020 to a level above the average of the 72 countries evaluated by "The Reprtrak Company".

In fact, in 2020, Morocco scored 64.2 points on a scale of 0 to 100 in the general "Country RepTrak® Pulse" indicator, recording a 5.4 point improvement compared to 2019. This level of external perception, the highest since the launch in 2015 of the survey on Morocco's reputation in the world, has enabled Morocco to join the top 30 nations with the best reputation among G-7 countries + Russia. By occupying the 27th position among the 72 countries evaluated, Morocco has gained 8 places compared to its positioning in 2019.

Compared to the 55 countries with the highest GDP, the Kingdom ranked 26th in terms of reputation among G-7 countries + Russia in 2020, up 6 places from its ranking in 2019.

Reputation, under the majority of attributes, improved significantly between 2019 and 2020. The "Recognized Brands and Companies" and "Technology and Innovation" attributes showed the highest rates of improvement in reputation.

These results were obtained in the context of the COVID-19 pandemic, since the 2020 survey was administered between March and May, a period of high containment.

Efforts deployed for the management of the health crisis by the Moroccan authorities, under the leadership of His Majesty the King, have contributed to the significant improvement of Morocco's external reputation. An analysis of the content of the official electronic media has shown that the Kingdom was cited as an example in this area.

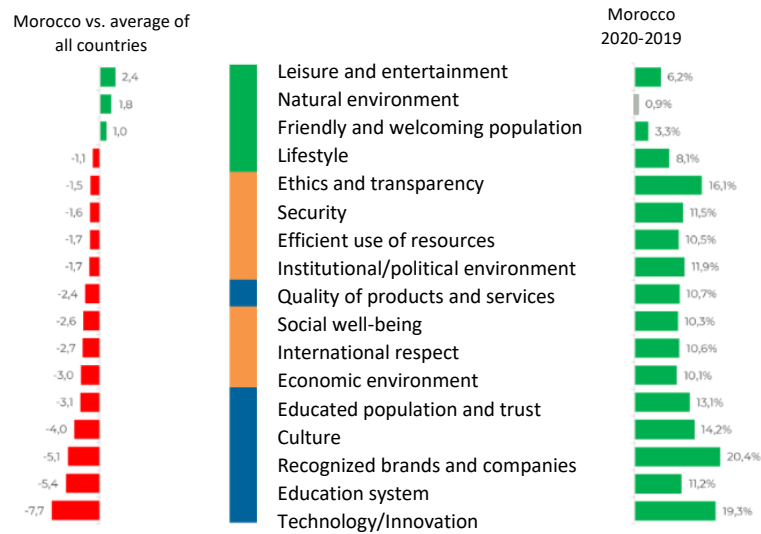
Morocco's reputation among the G-7 countries + Russia is equivalent, in 2020, to that of Taiwan, Malaysia and Argentina. It is very favourable in France, the United States, the United Kingdom and in Australia. On the other hand, reputation has reached a low level in Turkey, Chile, South Africa, Nigeria and Sweden.

It should be noted that Morocco's reputation among the G-7 countries + Russia has surpassed that of Chile for the first time since 2015.

The 2020 edition confirms the conclusions highlighted by the editions of 2015 to 2019 regarding Morocco's reputation in the G-7 countries + Russia. The elements of convergence are as follows:

- Morocco enjoys an average external reputation when compared to more than 70 countries selected by "The Reprak Company". Its reputation is better than that of Indonesia and the BRICs and far exceeds that of Turkey and all Arab and African countries.
- While recalling that a country's reputation is built on the basis of attributes, divided into three dimensions: quality of life, quality of institutions and level of development, Morocco's assets with respect to external reputation refer to attributes of quality of life (natural environment, leisure and entertainment, friendly and welcoming population and lifestyle).
- Assessments are slightly below the global average – of the 72 countries surveyed – for attributes relating to institutional quality, particularly the economic environment.
- On the other hand, assessments are less favourable with regard to the attributes of the "level of development" dimension, in particular, the country's innovation and technological capacity, business and brand recognition, and the education system, despite the significant improvement in the perception of these attributes between 2019 and 2020.

Evaluation of Morocco's characteristics compared to the average of the 72 countries surveyed in the G-7 countries and Russia in 2020 and comparison with 2019



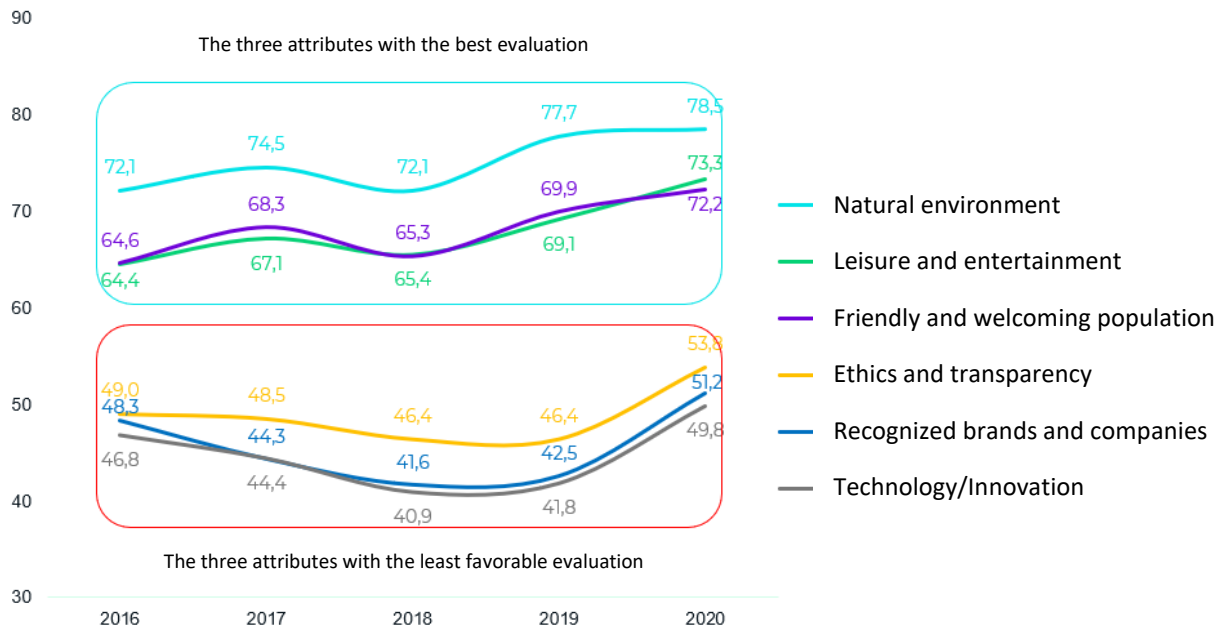
Scoring scale 0-100

A difference in the scoring is statistically significant if the value in absolute terms is greater than 2.7

In terms of time evolution of external reputation, the most significant findings refer to the following aspects:

- Morocco's reputation has significantly improved in 2020 compared to 2019 in Japan, the United Kingdom, Nigeria, the Netherlands, Italy, France, Turkey, South Africa and Spain. It has jumped significantly, especially in South Korea, China, Sweden, Germany and the United States. In the other countries in the sample, Morocco's reputation has remained stable.
- All supportive behaviours (studying, working, investing and living in the country, buying goods and services, attending events, visiting the country), as assessed by G-7 + Russia nationals, showed a clear improvement in 2020, compared to 2019. They remain, however, below the world average, with the exception of "visiting Morocco" behaviour.
- Morocco continues to be perceived as a country to visit, to buy goods and services or possibly to attend events there. This wish is not, however, expressed with the same intensity when it comes to studying in Morocco.
- The upward trend in external reputation continued in 2020 for all attributes except the natural environment, which was already well positioned.

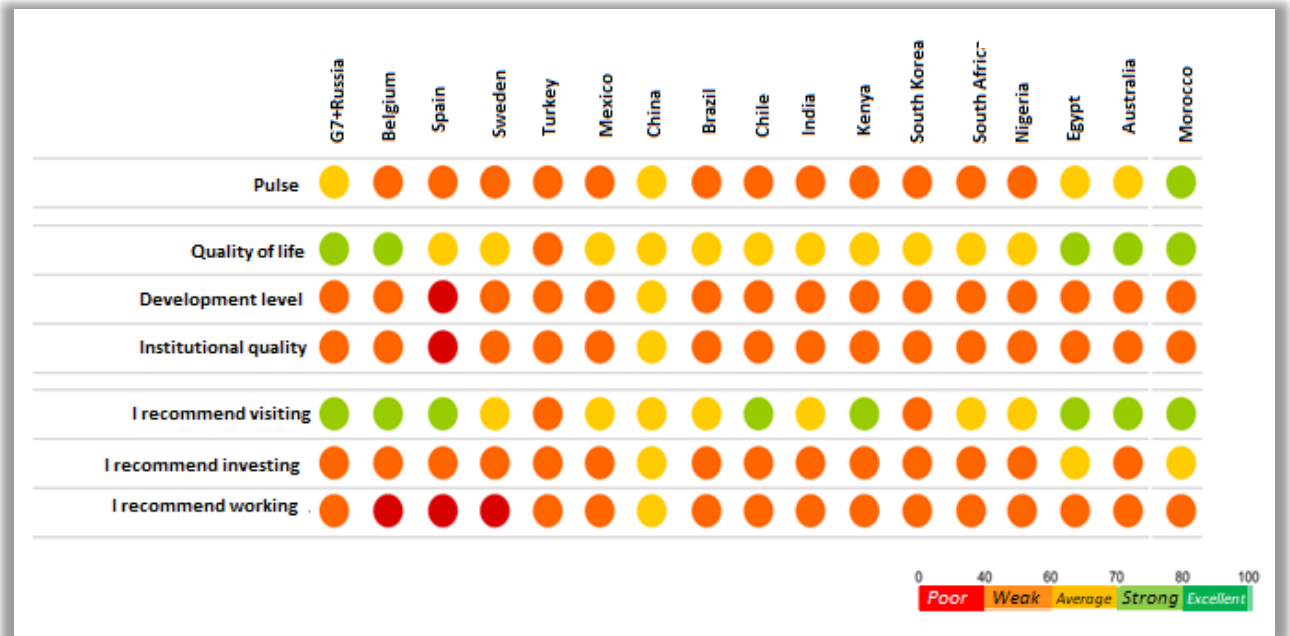
Evolution of the score of the main attributes that determine Morocco's reputation among G-7 countries + Russia, 2016-2020



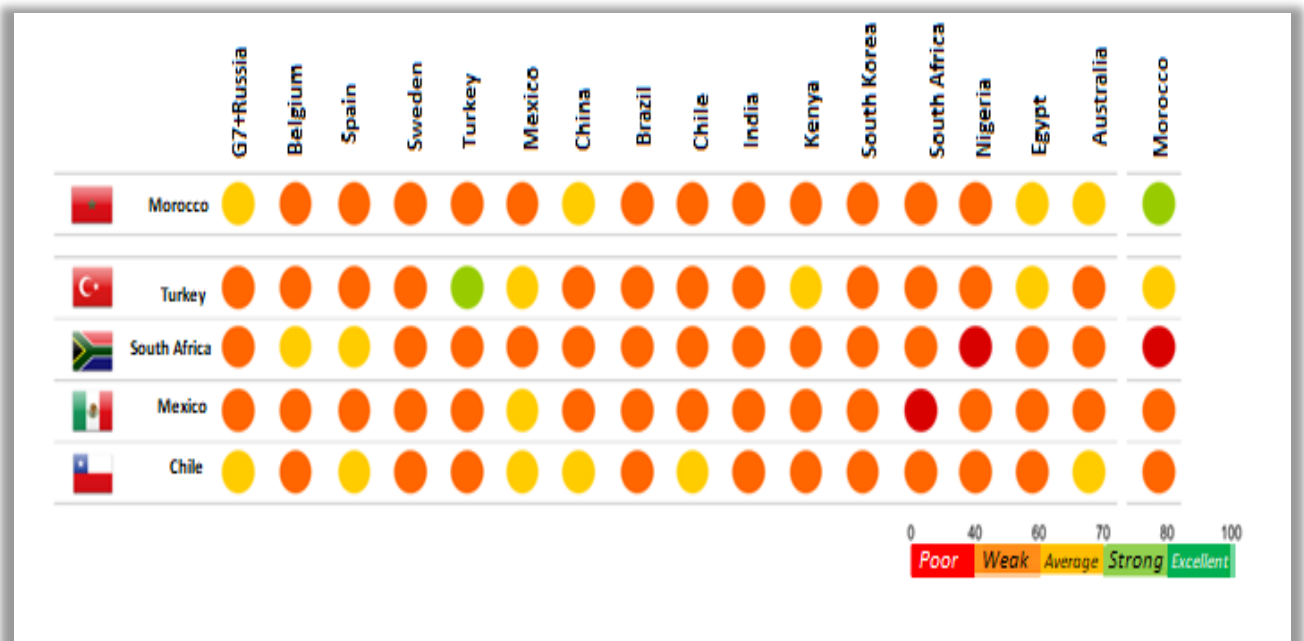
Analysis of the results inherent to Morocco's reputation, in 2020, among the specific countries chosen by IRES and those relating to the 4 benchmark countries (Turkey, South Africa, Mexico and Chile) has shown that:

- Australia, Egypt and China are the countries with the best perception of Morocco.
 - In Australia and Egypt, Morocco's reputation exceeds that of the benchmark countries as a whole for the majority of attributes.
 - In China, Morocco's reputation is generally superior to that of Mexico, Turkey and South Africa. On the other hand, it is inferior to that of Chile.
- Sweden, Nigeria, South Africa, Turkey, the Netherlands, Spain and, to a lesser extent, Kenya and South Korea have a less favourable perception of Morocco and the benchmark countries.
- Morocco generally keeps its advantages over Turkey, South Africa and Mexico for attributes associated, inter alia, with quality of life and institutional quality. Gaps are narrowing compared with Chile, which is slightly ahead of Morocco in most of the model's attributes.

Morocco's overall reputation by dimension and supportive behaviours towards Morocco at the level of the G-7 + Russia and specific countries, 2020



The reputation of Morocco, Turkey, South Africa, Mexico and Chile in the G-7 + Russia and specific countries, 2020



Morocco's internal reputation, which is made up of all the perceptions that Moroccans have of their own country, has shown a strong improvement during the period of high containment (+10.6 points) in 2020, following its downward trend between 2017 and 2019, to return to the historical level recorded in 2017, i.e. 70.9 points out of 100. This positive trend was observed for all the attributes making up internal reputation.

In 2020, Morocco recorded one of the highest rates of improvement in internal reputation, following the example of some advanced and emerging countries such as Italy, Brazil and Turkey.

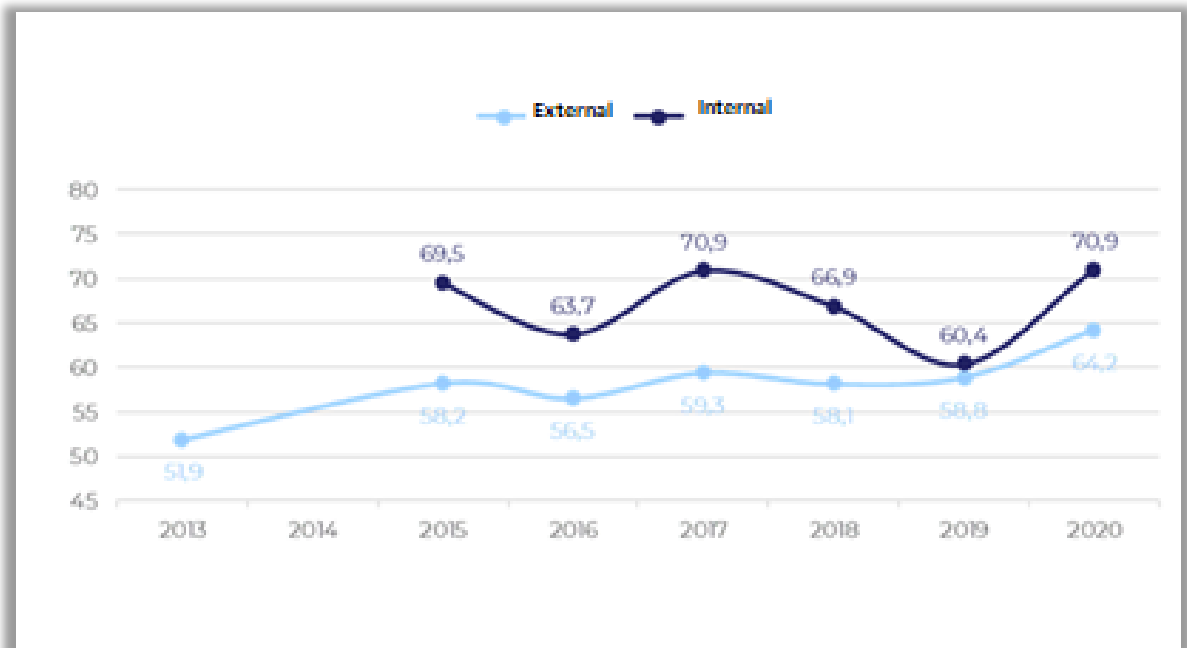
The improvement in the Kingdom's internal reputation could be explained by a return of confidence by Moroccan citizens in national institutions, in a context marked by the Covid-19 pandemic.

Morocco's internal reputation is far superior to the perception by Moroccans of the benchmark countries, i.e. Turkey, Chile, Mexico and South Africa. It should, however, be recalled that Moroccans used to perceive Turkey better than their own country.

A comparison of Morocco's external reputation in 2020 (in the G-7 countries + Russia) with its internal reputation reveals that:

- Like the 2015, 2016, 2017 and 2018 editions, Morocco is no exception to the general rule, which stipulates that internal perception is much higher than external perception, since the index of its internal reputation is almost 7 points higher than that of its external reputation. It should be reminded that the Kingdom had made an exception to this rule in 2019, since it was closer to countries that are more critical of themselves.
- Moroccans, more than foreigners, consider that their country is rich in culture and history and internationally respected and that they live in a country where security prevails and where the population is friendly and welcoming. These are opportunities on which the Kingdom should base its communication policy in order to establish its international image on solid foundations.
- Internal reputation is inferior, however, to external reputation, in terms of technology and innovation, the education system, the use of resources, recognized brands and companies, ethics and transparency, the institutional and political environment, social well-being, lifestyle and quality of goods and services. These shortcomings, which could pose real risks to Morocco's internal and external reputation, are real challenges that need to be addressed.

Evolution of Morocco's internal and external reputation



The 2015 to 2020 editions of the survey on Morocco's reputation in the world show an upward trend in Morocco's external reputation and a fluctuation in its internal reputation.

With regard to the relationship between reputation and value creation, the survey found a strong correlation between the variables of supportive behaviour towards the country and the "Country RepTrak® Pulse" reputation indicator.

Indeed, reputation determines the choices and decisions of economic operators. In the case of Morocco, the analysis of the impact of reputation on value creation has shown, in 2020, that each one-point improvement in the external reputation of the Kingdom leads to a potential increase in the number of tourist arrivals of nearly 12%.

In sum, the 6th edition of the survey on Morocco's reputation in the world came to the following conclusions:

- The Kingdom enjoys a generally positive international image that reflects the progress made in gradually building its status as an attractive power. Morocco's strengths, in terms of external reputation, refer to attributes relating to quality of life and security. Its weaknesses relate to attributes pertaining to the level of development.
- Institutional confidence, which has been restored thanks to the very positive improvement in internal reputation, deserves to be constantly maintained and consolidated, especially in the perspective of a possible second wave of the Covid-19 pandemic.

- Morocco should undertake sweeping reforms, particularly in the areas of education, innovation and technology, brand capital and the quality of goods and services. Efforts in these areas are alone likely to significantly improve its internal and external reputation.
- The positive perception of Moroccans regarding the attribute of "Security" is an opportunity for the Kingdom to communicate. Promotional activities should therefore be organized to further enhance this characteristic.
- It is time, once again, to build a sustained and strong Morocco brand. Morocco's action to promote its image internationally should be based on a strong message, highlighting the progress made by the Kingdom in various fields.
- The health crisis represents a real opportunity for Morocco to further strengthen its internal and external reputation. The Kingdom should consistently adopt an active communication approach, capable of maintaining the confidence of its citizens and its foreign partners.
- The fact that the level of knowledge of Morocco by the countries surveyed has been around 40%, since 2017, offers a communication opportunity that the Kingdom should seize to enhance its external reputation.

Country's external reputation vs. the extent to which the country is known, 2020

