Brand Morocco Research Program
Spring 2006
Final Report

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College and university students became the research agency for MATIC while enrolled in a for-credit, research related course. The students conducted research on Key Decision Makers and Consumers, where appropriate, and reported back to MATIC.

**Target Market:**
1. Commercial Decision Makers in all potential firms in pertaining industries that are considering overseas ventures, and Consumers (in those sectors where appropriate*).
   - High-Technology Electronics Manufacturing/IT/Call Centers
   - Fashion/Textiles/Garments*
   - Parts Manufacturing: Automobile, Consumer Products, Aircraft
   - Moroccan Design/Materials: Ceramics, Stone, Leather, Crafts, Wood Products*
   - Processed Foods/Specialty Foods*
2. Firms that have no, little, or significant knowledge about Moroccan marketplace.
3. Firms currently not located in Morocco.

**Purpose:**
1. Help the Moroccan business community identify level of knowledge about Morocco currently held by Commercial Decision Makers and Consumers (as appropriate) in target industry sectors.
2. Increase economic activity in Morocco through investment in the Moroccan marketplace, and expand economic and political stability.
3. Provide potential American companies with exposure to the Moroccan marketplace.
4. Identify potential investors in the Moroccan marketplace, and encourage American companies expanding internationally to consider Morocco as a viable option rather than investing in other countries.
5. Provide data to inform design of the Brand Morocco National Collegiate Case Study Competition to be held fall semester 2006, the goal of which will be to design effective marketing strategies to promote Brand Morocco to the target markets.
Challenges

Research Objectives:
*Find out what potential investors know and do not know and why, uncover how to get them to know more.*

1. Provide insight to Morocco on factors that will encourage and attract target segments to purchase and invest in Morocco.
2. Determine what image is consistently being communicated and interpreted, and how the target segment perceives it.
3. Identify what attributes about investing in Morocco are important and why they are important to the target market.
4. Determine whom the target segment defines as the primary competition to Brand Morocco.
5. Determine whom the target segment defines as the primary consumer candidate (demographic and psychographic profiles) – for those industry sectors where consumer data is relevant.

Other Considerations:
1. If a potential investor does not know anything about Morocco, then:
   - Determine what is needed to get them interested in Morocco.
   - Determine the factors that got them interested in investing in other countries.*
   - Uncover potential misconceptions or stereotypes held about Morocco.

   *Companies which are not currently investing internationally but have the potential to can also be researched.*
2. Identify the perceived risks in the marketplace that need to be overcome.
Methodology Recommendations

Qualitative Recommendations:
Utilize questionnaires to determine psychographics in the following settings:
• Interview with key decision maker(s) of company within respective industry.
• Focus Group discussion with decision makers and/or influential staff that are from respective industry.
• Focus Group discussion with consumers that purchase products from respective industry.*
  *If applicable depending upon industry sector being studied.

Qualitative Goals:
Characterize the psychographic responses so that decision maker’s feelings about the Moroccan marketplace can be measured and used to improve perceptions and overcome concerns.

Quantitative Recommendations:
Utilize a questionnaire to support psychographic attributes. Quantitative methods to employ may include:
• Cross tabulations
• Frequency distributions
• Chi-square tests

Quantitative Goals:
1. Test for the ability of the qualitative research results to be generalized, test against the population aggregates.
2. Show reliability of data collected.
3. Identify attitudinal and behavioral relationships that impact the image of “made in Morocco” goods and/or services.
4. Provide a basis for making strategic recommendations to MATIC.
Process:

Program Launch
Client Product Orientation (CPO)
Approval of research strategies and questions
Implementation of research
Client conference call
Presentation of final materials
Top two (2) teams present at MATIC Headquarters

Resources:

Student Web site
Student Binder
MATIC Creative Brief
MATIC representative
EVP Account Team

Binder Cover

Student Web site Home Page
Spring 2006 School Selection

The following ten (10) campuses were selected to participate and assigned the following industry:

Processed/Specialty Foods:
• Colorado State University
• University of Illinois, Urbana-Champaign

Parts Manufacturing:
• Florida State University
• Washington University in St. Louis

Fashion/Textiles/Garments:
• George Washington University
• New York University

Moroccan Designs/Materials:
• New Mexico State University
• San Diego State University

Hi-Tech/IT:
• Simon Fraser University
• University of Texas, Austin
Colorado State University (Fort Collins, CO)

**Industry:** Processed/Specialty Foods

**Professor:** Dr. Dave Gilliland

**Class Enrollment:** 45 students

**Class Title:** Marketing Research BK410

**Qualitative Research Methodology:**
- 4 phone interviews with distribution channels: Monterrey Provisions, DPI-Rocky Mountain, Food Dirt and World Wide Specialty Food
- Seven, 15-20 minute telephone interviews with grocery chains: Kroger (2), Wild Oats (2), Other (3)
  - Participants: President, Vice President or any position involved in purchasing
- 26 in-depth interviews with consumers between ages 20-60 at Whole Foods and King Soopers

**Quantitative Research Methodology:**
- 95 customer surveys at 3 grocery stores in Northern Colorado: King Soopers, Safeway and Albertsons
  - Gender: 52% males and 48% females
  - Ages: 50% between 25 to 44
  - Education: 40% Bachelor’s degree
  - Income: 30% $25,000 to $49,000, 22% $50,000 to $74,000
Qualitative Research Findings - Food Distributors

- Little prior knowledge concerning Morocco.
- Participants ranked Morocco favorably with regards to its competitors.
- Interviewees affirmed that there was little concern about the country of origin with regards to processed foods which translates to an open, available market for Moroccan goods.
- Distributors look for availability and guarantee of products in a timely matter.
- Majority of distribution takes place on local or state level with only handful of international distributors and few that deal in processed foods.
- Companies that do business internationally have strong relationships with their suppliers because of their dependability, timeliness and good product quality.
- Price is a very important factor when choosing a supplier and their products.
- Trade shows appear to be one of best avenues of exposure for beginning market entry.
Colorado State University
Highlights

Qualitative Research Findings - Grocery Chains

• Price and quality were found to be the most important factors that potential suppliers are looking for.
• Many current US companies already have the products that Morocco is looking to bring to the US.
• United States food purchasers hold strict and specific guidelines when looking for specialty suppliers.
• The major purchasers tend to follow emerging trends which rarely include specialty food items.
• When a specialty food item is evaluated by a purchaser, there are many standards that must be met by the supplier which include:
  – Cost - Will this product make the buyer's company money?
  – Packaging Size - Bulky packaging results in low turnover rate and high amounts of shelf space which is bad for specialty food purchasers
  – Insurance Policy - Base insurance policy for a seller like Morocco would be 2 million dollars, and this provides the buyers with assurance about the company that the buyer is doing business with
  – E-Business compatible - Modern technology has driven the food industry to be electronically compatible when things such as billing are considered
  – Packaging Regulations (nutrition/ ingredients)
  – Overall history of the product's success
• One advantage for Morocco is the rising popularity of exotic and ethnic foods.
• The majority of the survey participants lacked information about the Moroccan food industry.
• Companies such as Droger, Wild Oats and Johnathan’s Organics expressed the impression that a specialty food supplier, such as Morocco, should use distributors as an introduction avenue into this market.
• The selection of a quality distributor is essential in the endeavor to expose the market to Moroccan foods and making contact with the distributor is key.
• Trade shows are an excellent way to spread interest of Moroccan products to the main distributors.
  – Trade shows in New York, Chicago and San Francisco were the three main shows referenced by our interviewees.
Qualitative Research Findings - Consumer Opinions and Purchasing Behaviors

• Spending on ethnic food has grown at an average annual rate of 4.9% over the past five years. Ethnic foods now account for 11.8% of all retail food sales in the United States.

• Most of the associations with Morocco fell into three major topics:
  – Culture
  – Food
  – Location

• Many people were unaware of the products that are capable of being produced in Morocco; they are willing to, or already do, purchase many of them.

• The main consensus amongst most of the participants is that they are more concerned with the competitive pricing of the good and the perceived quality in which the product is packaged and delivered.

• Perceptions were influenced by images of belly dancers and the movie Casablanca.

• The products that Morocco should implement in large amounts were those consumed regularly. The top five:
  – Frozen vegetables
  – Canned fruits
  – Canned olives
  – Olive oil
  – Wine

Later introduce the less popular items:
  – Capers
  – Gherkins
  – Sardines

Chart represents how consumers ranked Morocco on scale of 1-10 (1=Negative and 10= Positive). X-axis is ranking and Y-axis is # of consumers.
Quantitative Research Findings - Consumer Opinions and Purchasing Behaviors

- Willing to try imported foods: 93%; Not willing to try imported foods: 7%.
- 48% purchase imported foods on a regular basis; 52% do not purchase imported foods on a regular basis.
- Things that came to mind when thinking of Moroccan foods: The food items listed on survey: 25%; Exotics associated with Morocco: 10%; Positive responses: 17%; Negative responses: 2%; Nothing or didn't know: 46%.
- Products purchased from Morocco:
  - Olive Oil: 2%
  - Sardines, anchovies, and fish products: 6%
  - Fruits and vegetables: 2%; Olives, capers, and pickles: 3%
  - Exotics: 6%
  - Not aware or didn't know: 81%
- If people have a favorable opinion towards the quality of imported foods, the likelihood of purchasing imported food products increases.
- If people have a favorable opinion towards the quality of specialty imported food products, the likelihood of purchasing specialty imported food products increases.
- If people enjoy cooking gourmet meals and trying new and unusual recipes, the likelihood of purchasing specialty imported food products increases.
- There is not a correlation between high total household income and the likelihood of purchasing imported food products.
- The higher the likelihood of purchasing imported food products, the higher the likelihood of purchasing imported food products from Morocco.
- If people rate the quality of imported food products from Morocco highly, the likelihood of purchasing imported food products from Morocco increases.
- If people score highly on the adaptation construct, the likelihood of purchasing imported food products from Morocco increases.
Quantitative Research Findings - Data Analysis Results

When buying Canned/Frozen Produce such as Canned Olives, Canned Fruits and Frozen Vegetables, these are the most important purchasing characteristics

<table>
<thead>
<tr>
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<th>Mean</th>
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<tbody>
<tr>
<td>Quality</td>
<td>4.6</td>
</tr>
<tr>
<td>Nutrition</td>
<td>4.4</td>
</tr>
<tr>
<td>Price</td>
<td>3.7</td>
</tr>
<tr>
<td>Origin</td>
<td>3.4</td>
</tr>
</tbody>
</table>

When buying Specialty Products such as Capers, Sardines, Anchovies or Olive Oil, these are the most important purchasing characteristics

<table>
<thead>
<tr>
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<th>Mean</th>
</tr>
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<tbody>
<tr>
<td>Quality</td>
<td>4.3</td>
</tr>
<tr>
<td>Nutrition</td>
<td>3.9</td>
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<tr>
<td>Origin</td>
<td>3.6</td>
</tr>
<tr>
<td>Price</td>
<td>3.5</td>
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</tbody>
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Likelihood of Purchasing Food from These Countries

<table>
<thead>
<tr>
<th>Country</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain</td>
<td>3.7</td>
</tr>
<tr>
<td>UK</td>
<td>3.6</td>
</tr>
<tr>
<td>Mexico</td>
<td>3.3</td>
</tr>
<tr>
<td>Chile</td>
<td>3.3</td>
</tr>
<tr>
<td><strong>Morocco</strong></td>
<td><strong>3.2</strong></td>
</tr>
<tr>
<td>Turkey</td>
<td>3.0</td>
</tr>
</tbody>
</table>

Scale : 1 = Not important; 5 = Important
Recommendations

- Companies such as Kroger, Wild Oats and Jonathan's Organics have expressed the suggestion that a specialty food supplier, such as Morocco, should use distributors as an introduction avenue into the US market.

- The selection of a quality distributor is essential in the endeavor to expose the US market to Moroccan foods. Making contact with the distributor is key.

- Trade shows are an excellent way to spread interest of Moroccan products to the main distributors. Trade shows in New York, Chicago, and San Francisco were the three main shows referenced by the interviewees.

- The distinctiveness of a trade show in Morocco would be a variation for the purchasers to see the citizens and culture of Morocco. A key factor influencing the possibility of having a trade show in Morocco is the expense. Buyers currently have little interest in Morocco so the price to get them to Morocco will be more costly.

- The products Morocco would have most instant success with were frozen vegetables, canned fruits, canned olives, olive oil, and wine. These products are established and consumed on a regular basis in the American market. These are the products that the findings suggest that Morocco should promote in order to establish their image in this market. After this image has been enhanced there will be a foundation set for Moroccan products allowing an easier introduction for the products that were less popular.
  - Less popular products consisted of capers, gherkins, and sardines. Primarily, the reasoning behind these products being less popular is the lack of use, therefore the misunderstanding of their value.

- Various actions can be suggested based on the data obtained by the studies. Each of the following is based on information obtained during the varying studies both of the business and consumer levels.
  - Promotion of consumer awareness of Morocco
  - Focus on cleanliness and sanitation
  - Meet US regulations on food imports
  - Create a strong and valuable bond with food distributors
  - Take advantage of the 'clean slate' Morocco currently possesses in the eyes of the American consumer
University of Illinois, Champaign Highlights

University of Illinois, Champaign (Champaign, IL)

Industry: Processed/Specialty Foods
Professor: Mr. Steven Hall
Class Enrollment: 20 students
Class Title: Advertising 400

Qualitative Research Methodology:
- 7 phone/in-person interviews with Commercial Decision Makers
  - Participants: Grocery stores, Restaurants and food suppliers, Food processors, Acquisition and purchasing managers
  - Gender: 100% male
- 1 consumer focus group from college population
  - Gender: 4 females, 3 males
- 4 consumer in-depth interviews
  - Gender: 1 female, 3 males

Quantitative Research Methodology:
- 112 In-person consumer survey conducted at grocery or specialty stores
  - Gender: 61 females, 50 males, 1 unknown
  - Age: majority between 25 to 44
  - Ethnicity: Americans (79.5%), International citizens (20.5%)
- 23 Online/Faxed Buyers, importers and investor survey
  - 39.1% distributors, 4.3% importers, 52.2% both
  - 60.9% small sized with less than 50 employees
Qualitative Research Findings

Commercial Decision Makers:
- Low awareness of Morocco’s resources, attractive climate, and appeal to businesses.
- Quality is the most important factor when choosing product sources.
- Most new opportunities are learned from colleagues in same industry.
- Companies were unwilling to commit to investing in a country before having a comprehensive understanding of its political and economic climate.

Consumers:
- Low awareness of Morocco in general; even lower specifically related to food from Morocco.
- Their primary in-store decision-making factors include: packaging, nutritional value, recommendation/reputation.
- Consumers hold a finite number of food items in their minds for a particular country.
University of Illinois, Champaign
Highlights

Quantitative Research Findings - Commercial Decision Makers

- Businesses currently in international trade consisted of 69.9%.
- Of the 7 businesses currently not in international trade, 60% plan to be in the next 3 years.
- Strongly identified Morocco as an underdeveloped country and small industry.
- Gain most of their knowledge about Morocco from the news, which includes the Internet, radio, and television.
- Seven countries were rated in terms of investment opportunities (India, Spain, Mexico, Chile, Turkey, Morocco, and Jordan), and Morocco rated second to last.
- CDMs were asked to rate how important certain factors were when deciding to invest in food products overseas.
  - Top three factors were product quality (M=3.21), good business relationship (M=3.21) and safe location (M=3.16).
  - CDMs were then asked to rate how Morocco performed on these factors; Morocco scored significantly lower.
University of Illinois, Champaign Highlights

Quantitative Research Findings - Consumers

• 74.1% purchased food products manufactured overseas and 21.4% have purchased products made in Morocco.

• Knowledge of Morocco was low (M=1.92) and current image held of Morocco was relatively neutral (M=2.54).

• Olives, oranges, couscous, clementines and wine were the top five Moroccan food products consumers would be most interested in purchasing.

• Gain most of their knowledge about Morocco from the news, although a high percentage of respondents said nothing influences their perception of Morocco.

• Consumers were asked to rate how important certain factors were when deciding to purchase food products; culinary taste (M=4.37), pricing (M=4.07) and good value for money (M=4.06) rated the highest.

Significant differences found between income, gender and age groups from the consumers:

• Income was regrouped into three categories: Low ($10,000-24,999), Medium ($25,000-$74,999) and High ($75,000 and above)
  – The high income group was more familiar with Morocco.
  – The high income group was more aware of certain food products from Morocco.
  – The high income group also rated higher for Moroccan food suiting their culinary taste.

• Gender
  – The purchasing factors based on ethnic backgrounds were significantly higher for males.
  – Females agreed it was important if the product was sold by a reliable retailer more than males.
  – Moroccan food products having reference to their own ethnic background was more important for males.

• Age was regrouped into 5 categories: First (ages 20-24), Second (ages 25-34), Third (ages 35-44), Fourth (ages 45-59) and Fifth (ages 60 and older).
  – Only one factor between the age groups had a significant difference: The first age group (M=2.18, SD=1.074) thought that Moroccan food had more reference to their ethnic background than the fifth age group (M=1.00, SD=.000).
University of Illinois, Champaign
Highlights

Recommendations

• Identify and segment consumers into two target markets based on desirable qualities of Morocco and then utilize unique communication channels and strategies to attract these two unique groups:
  – Primary market (commercial decision maker)
  – Secondary market (end consumer)

• Specify a narrow market focus for consumer food offerings, similar to Ireland’s marketing of Guinness. Such refinement will increase brand awareness and build an image of quality for the following Moroccan goods:
  – Olives
  – Sardines and Anchovies
  – Couscous
  – Clementines

• Clearly communicate to potential investors taxation and investment incentives put forth by the Moroccan government.
  – Shown to be critical factors for new investment decisions.

• Emphasize and increase awareness of the quality products Morocco produces to CDMs.
  – Increased quality perception will transfer to other sectors (i.e. high-tech, textiles).

• Build a lasting relationship with investors and buyers after partnerships are established.
  – Research demonstrates nearly all respondents seek out this means on conducting business.

• Intercept changing taste preferences of baby boomers by targeting them in consumer marketing efforts.

• Utilize current perceptions of food from Morocco to successfully launch awareness campaign.
  – Method is simpler and will efficiently increase consumption of goods.
Florida State University (Tallahassee, FL)

**Industry:** Parts Manufacturing (specifically automotive and aviation)

**Professor:** Mr. John Brennan

**Class Enrollment:** 14 students

**Class Title:** Advanced Market Research

**Qualitative Research Methodology:**
- 6 phone interviews, conference calls and personal interviews
  - Participants: Decision makers from US retailers/buyers in the parts and manufacturing industry (Air Traffic Controlling, MorRyde, Specialty Manufacturing, CFASSP, PBS&J, JAA, RiCon Corporation)

**Quantitative Research Methodology:**
- Surveys (electronic and handout) to parts manufacturing companies
  - Level of business: International (60%), National (30%), State (5%) and Local (5%)
  - Participants: Decision makers from US retailers/buyers as well as decision makers at all levels of the parts and manufacturing industry
- Surveys (handout) to over 200 students, faculty, and staff
  - Class Standing: Juniors (27%), Seniors (23%), Freshmen (20%), Sophomores (19%), Grad students (6%) Faculty (5%)
  - Ages: 18 - 20 (54%), 21 - 23 (34%), 24+ (12%)
  - Ethnicity: 36% Caucasian, 34% African-American, 14% Hispanic, 2% Middle Eastern and 4% Asian/Pacific Islander, 10% Unknown
Qualitative Research Findings

- The majority of the people interviewed perceived Morocco as a vacation or tourism area.
- The majority of companies that replied “no” for considering Morocco or Moroccan products as interesting for them, were due to lack of interest or relevancy. Companies that replied “possibly” said that it was pending further research into the market to determine the benefits to the company.
- Price was a strong determinant for companies when deciding to outsource items or establish partnerships.
- Outsourcing was not relevant to some of the companies, because either they do not have outsourcing needs or they operate more on an individual level.
- The majority of companies interviewed ranked Morocco more on the positive end of the scale as a place in which to set up operations.
- The level of political stability was the highest factor when deciding whether or not to outsource products to Morocco.

When you think about locations which to do business or set up operations what comes to mind when I say Morocco?

If you are interested in selling into and being active in new markets, would Morocco or Moroccan products be interesting to you?
Quantitative Research Findings - Current Decision Makers

- 52% believed Morocco would not be a beneficial business partner, while 46% did show interest in doing business with Morocco.
- 52% showed interest in Moroccan products.
- “Quality of the end result/product” and “costs associated with production” received 60% as top factors that influence a business decision. “Legal regime and government support for business” received 12%, and only 8% for “Relationships such as trade agreements with other countries.”
- 76% believe that Automotive or Aviation parts manufacturing is not a prominent industry in Morocco.
- 96% of the companies surveyed have never done business with Morocco.
- 76% say they have done business with other offshore companies.
- Ranking questions: 1 = lowest and 5 = highest
  - 60% ranked Morocco as low in terms of quality of parts and products (1 or 2), the same result as Turkey
  - 54% ranked French products as average (3)
  - 40% ranked Japan as receiving highest in quality (5)
  - 44% ranked the US highest in quality (5)
- When choosing between France or Morocco to purchase a part, 68% selected France and 22% selected Morocco.
- Price and perception of quality were ranked highest as criteria when making a purchasing decision.
- When asked about positive factors that affect the image of Morocco the answers were: “Location” (25.2%) and “Culture” (21%); “Products from Morocco” was at 16.8% and “word of mouth” was at 15.1%.
- The most important barriers of concern for companies when dealing offshore were Tariffs (17.5%), Government Regulations (21.9%), Lack of Industry Infrastructure (19.7%), and Legal Protections (15.3%), Language and Cultural Differences seemed not as important at 12.4% and 9.5% respectively.
Quantitative Research Findings - Future Decision Makers

• The results indicated an obvious product preference for Spain over Morocco. However, students were more likely to purchase a product from Morocco than from Turkey or Portugal.

• The clear majority only “knows a few details” and the remaining respondents knew nothing. In the quality graph, the two largest pieces were “good” and “average”.

• The location of Morocco was widely known among the students.

• The FSU group associated Morocco with Agriculture and Textiles as the two highest choices, with Automotive and Aeronautical as the lowest.
Recommendations

- No real clear ideas or views of Morocco, and if there are, they are relatively neutral. This means that Morocco has the chance to make some pivotal changes in their industry sectors to make them visible to other foreign markets in a positive way.

- The awareness level of Morocco is not where it needs to be in order to be thought of as a potential investment opportunity. In order to get that level of awareness and recognition to where it needs to be, based on FSU’s findings, the following is recommended:
  - Morocco must push their present invested companies. They must realize the importance of these companies because they are the foundation for the future. Their presence will in turn make potential new investors more confident and encourage them to enter the market.
  - The marketing needs to focus on costs and quality, for these two factors were the most important in their findings.
  - Morocco also must take advantage of its funding and enterprises. Free Trade Zones (FTZ’s), State Enterprises and Hassan II fund all offer incentives for business relations with Morocco.
  - Specifically, by making an improved MATIC Web site or a Web site involving one of the enterprises, Morocco will make themselves easily available to potential investors who may want to learn how to begin creating a business relationship with Morocco. This Web site should be one of the first things to appear when one searches online for “Morocco.”
Washington University in St. Louis (St. Louis, MO)

**Industry:** Parts Manufacturing  
**Professor:** Dr. John Branch  
**Class Enrollment:** 45 students  
**Class Title:** International Marketing

**Qualitative Research Methodology:**
- 7 Personal interviews
  - Participants: Managers responsible for international decision making within companies that currently do and do not outsource
    - Automotive: General Motors, Ford, Aisin, UGN, Caterpillar, John Deere, Consultant
    - Aerospace: Boeing, EADS, Lockheed Martin, LMI Aerospace, Inc.

**Quantitative Research Methodology:**
- 5 written surveys conducted to qualitative participants prior to interview
  - Participants: Top executives/key decision makers of target companies
  - Positions: Ranged from industry consultants to managers in departments such as “Procurement & Supply” and “Common Systems Architecture”

- 4 Internet surveys to St. Louis dealers
Qualitative Research Findings - Automotive Industry

General Approach to Internationalization:

- Automotive companies expand into countries that are revenue markets if they believe there is strong demand for their product in the country.
- Morocco is not generally perceived as a strong potential revenue market.
- “Insufficient demand and insufficient income levels to support significant automotive manufacturing capacity” - Global director of General Motors.

International Triggers for Sourcing Markets - Automotive Companies:

- Cost:
  - Lower cost advantages of inputs as raw materials and labor are key triggers for automotive companies to establish production facilities in a new sourcing market.

- Quality:
  - Quality is an integral variable in the automotive industry.
  - The quality standards of top automobile manufacturers are only one step below those of aerospace industry (very high).
  - Focus on the best design from a consumer perspective.

- Technology:
  - Automotive companies are driven to new markets by advancements in technology because they want to maintain a competitive edge.

- Free-trade zones and FTAs:
  - Companies often revisit these internationalization decisions when such agreements are announced, because it changes the economics of a plant placement or parts sourcing decision.
Qualitative Research Findings - Automotive Industry

International Triggers for Sourcing Markets - Automotive Suppliers:

- Just In Time (JIT) production:
  - JIT manufacturing process is one of the factors that prompted the creation of automotive manufacturers close to the consumer markets and assembly chains.

- Electronic Data Interchange (EDI):
  - EDI is an integrated system of the automobile manufacturer and part supplier.
  - “The supplier is constantly informed about the level of part inventory of its client, and ships immediately when the amount of inventory is below certain threshold.” - VP Ford, Russia

- Local content requirements
  - Governments often impose large taxes on automobiles if they do not meet local content requirements.

How companies Evaluate Markets and Suppliers:

- Macro Parameters
  - Political stability and political approval
  - Corruption
  - Spoken language: Dominant language is often English

- Filters for Parts Suppliers
  - Cost factors: Cost is the deciding factor for products of equal quality.
  - Historical relationships: Educated workforces are particularly relevant for part suppliers of integral car components.
  - Establishing production process: Production process of the supplier needs to meet a comprehensive set of quality, cost and time standards.
  - Transit time: Staggering costs of production shut-down require suppliers to be within reach of their clients.
  - Educational and Skilled Labor: Educated workforces are particularly relevant for part suppliers of integral car components.
  - Historical relationships: Reputation in the industry are often considered by auto manufacturers in evaluating part suppliers.
  - Financial stability: Critical factor because the risk of a supplier going bankrupt endangers the producer’s assembly line.
  - Gut feel: “At the end of the day, international expansion and the choice of a supplier is often a ‘gut feel.’”
    - Mr. Marley, John Deere
Qualitative Research Findings - Automotive Industry

Perceptions of Morocco
- Tend to associate Morocco with Tunisia and Algeria due to common historical French influence
- Unaware of the existence of an automotive industry in Morocco
- Morocco is connected to the tourism industry
- They consider Morocco as out of reach (14 days of transportation)
- Research participants see Morocco as lacking a unique value proposition, relative to other low-cost countries
- Quality of parts manufactured in Morocco is perceived as average

Challenges for Morocco
- Lack of awareness
- Minimal domestic demand in the automotive industry
- Shipping costs and high transit times to the US as an obstacle
- Automotive industries are looking for cost, quality, time, technological advantages and time saving
- Quality of parts manufactured in Morocco is perceived to be average
Qualitative Research Findings - Aerospace Industry

General Approach to Internationalization:

- Boeing Defense:
  - Develops strategic partnerships with customers who decide to purchase large quantities of Boeing products – offset programs.
  - Translation and transportation between headquarters in the USA and other areas of the world is expensive, and the cost savings of labor would not be beneficial.
  - Before any international manufacturing can occur, Boeing must secure clearance from the United States Department of State.
  - It is unlikely that Boeing would view expansion into Morocco as a strategic initiative – from the defense sector.
- Lockheed Martin:
  - Morocco would be an ideal location to sell defensive products to, as it is politically stable.
  - Morocco’s shortcomings included below average production capabilities, technological development and research are below average.
  - Morocco should not start its industrial expansion with the aerospace industry.
  - Morocco should work on expanding simpler or service based areas such as computer repair or service based industries.
- Boeing Civilian:
  - They would internationalize to a company based on its access on regional markets and if it represents the “Right Business Opportunity.”

Perceptions and Challenges of Morocco:

- Many factors that can attract segments to purchase aerospace items are not aligned with Morocco.
- Very few executives had any detailed knowledge of the Moroccan economy.
- Many have misconceptions about Morocco, grouping it with much poorer, less stable, and less technically advanced nations.
Recommendations - Automotive Industry

Identify value proposition:

• Clearly state the value that Morocco can add to automotive firms.
• The FTA is not enough to attract automotive companies to Morocco.
• Morocco needs to be very specific about cost reductions (comparison with other markets), quality improvements that can be achieved in Morocco, and technological innovations.
• Formulate or position the Moroccan industry with a unique offer.

Comprehensive promotional campaign:

• Educate automotive firms about the Moroccan industry.
• Needs to advertise high quality/low cost production, availability of highly educated employees in automotive industry, and its state-of-the-art industrial parks.
• Consider a lobbying office in Detroit to inform the “Big Three” of the opportunities that exist in Morocco.

Attract a specific automobile manufacturer to the country:

• The manufacturer will bring some of its automotive suppliers that would follow their client.
• Use it as a flagship for other companies.

Production on non-JIT parts:

• Since the JIT manufacturing process can prohibit automotive suppliers to enter Morocco without their clients having an established manufacturing facility in Morocco, Morocco could focus on attracting suppliers that are not constrained by the JIT manufacturing process.

Raw Materials:

• Morocco can promote sourcing raw materials from its industry instead of just finished products to allow suppliers to take advantage of lower input costs from the Moroccan industry.
Recommendations - Aerospace Industry

- Start with a small industry; go up in the value chain in the raw materials (plastics, steel or aluminum industries).
- It will be impossible to attract any potential client that has extremely high costs and entrenched traditions in doing business without having a strong industry associated with Morocco.
- Shoring up basic industrial needs such as factories and basic modern infrastructure such as telecommunications would go a long way towards improving Morocco’s image as a prime location for foreign investment.
- Morocco should look into expanding their purchases of major Aerospace products in order to increase the domestic production.
- Morocco should promote their abilities to produce smaller technical products because most companies do not know much about the technical capabilities of Morocco and they often emphasize capability and cost when internationalizing.
George Washington University (Washington, DC)

Industry: Fashion/Textile/Garments

Professor: Dr. Liesl Riddle

Class Enrollment: 25 students

Class Title: International Marketing, MBA

Qualitative Research Methodology:

- 2 Consumer focus groups
  - Targeted sample included 19 total participants
  - Focus group included collage activity (see image)
  - Age Categories: 25-35 singles or couples with no children, 35-45 with kids, and 45+ with older kids according to the three selected Claritas segments (2nd Society, Elite Suburbs and Landed Gentry)
  - Due to time and funding constraints, analysis focused on one category of consumers that was highly representative of the target market that Morocco seeks: The segments that spend at least $100 on jeans in one year
- 15 Organizational buyers and investors interviews
  - Specialty Stores: The Dress Barn, Inc., K&G Men's Company, Inc, Bravissimo Ltd and Norm Thompson Outfitters, Inc
  - Department Stores: Nordstrom Inc. and T.J. Maxx
  - Other: Phillips-Van Heusen

Quantitative Research Methodology:

- Written survey conducted with 19 focus group participants prior to focus group session
Qualitative Research Findings - Consumers

- Respondents did not know very much about Moroccan apparel before being stimulated through the collage activity.
- Advertising of Morocco’s clothing and textiles received low marks: “This country’s clothing is intensely advertised” Avg. response – 3.10 (scale of 1-7, 7=strongly agree).
- “This country’s advertising of its clothing is informative” Avg. response – 3.21 (scale of 1-7, 7=strongly agree).
- When consumers consider a clothing purchase, the importance of price, comfort/fit and color are obvious. Other considerations include fiber content and garment care requirements. The “Made in” label is essentially unimportant in the minds of the respondents when they evaluate attributes for purchase of apparel.
- The brand name of the apparel is significantly more important than the “Made in” label.
- The three groups use the same criteria to purchase clothing, with the only exception that the importance of style/fashion is a bit less important to the 2nd City Society group.
- Despite differences in the composition of each group (age and number of children varied between participants), the responses were fairly similar across the three considered groups for every question posed.
- It is unanimously evident that Italy is recognized as the world leader in designing fashionable apparel.
- The participants perceived Morocco as a place where fashionable clothes can be designed but not at the level of Italian apparel.
- There was a positive perception of Morocco.
- None of the participants has had negative experiences with Moroccan products and therefore they seemed more open to the possibility of trying Moroccan apparel.
- Currently, participants are unfamiliar with any Moroccan designer. Every group stated that they did not have much knowledge of Morocco and more specifically clothes made in Morocco.
Qualitative Research Findings - Consumer Collage Activity

- Moroccan collages show more white space than the ones created for Mexico and Italy. In the collages created by the Landed Gentry, there is a greater use of words, most of which allude to the idea of Morocco being an exotic and attractive place. Words included in the Landed Gentry’s collage include “mysterious,” “unknown,” “escape,” “oasis,” “sultry.”

- Choices of colors were bright and floral in design and images of beaded and sequin garments were frequently selected.

- There is a distinct “Humphrey Bogart influence” in the collages and the images selected by the participants, indicating that associations with Morocco seem to be greatly shaped by the famous “Casablanca” movie.

- Oriental rugs, elaborate architecture, ornate decorations were also mentioned during the Landed Gentry’s discussions about Morocco collages.
Qualitative Research Findings - Organizational Buyers

- Criteria affecting their decisions about sourcing products or working with overseas partners (scale from 0 to 5, where 0 is not important at all and 5 is extremely important):
  - Most Important: Quality (5 on average), style/design (4.9) and cost of the product (4.8), regular communication with the supplier (4.5) and the reputation of the supplier as an ethical employer protecting the rights of his/her employees (4.3).
  - Somewhat Important: Turn around time (3.9) and production capacity (3.8) of the suppliers were somewhat less important criteria.
  - Least Important: Lead time (3.3), the “made in” label (3.3) and a personal relationship with the supplier (2.9) were definitely the least important criteria for buyers’ decision-making process.

- 87% of the interviewees indicated historic sales data as a major source of information; 67% indicated trade shows and word-of-mouth as other important sources of information. The following trade shows were mentioned by interviewees:
  - New York trade shows, such as Coterie
  - Las Vegas trade shows such as Project Magic
  - European trade shows (France and Italy)
  - Product specific trade shows (Asian fabric trade shows)

- 53% of the participants indicated trade publications (e.g., InStyle Magazine, Woman’s Wear Daily, Body Magazine and Apparel Magazine), consumers’ comments and sales clerks as other sources of information for their sourcing decisions.

- When asked about Morocco, buyers uniformly declared that they had insufficient information to express any type of judgment on the country as a potential location to set up operations or do business in the apparel sector.

**Chart #13: SOURCING ISSUES**

1. On a scale of 0 to 5, where 5 is most important and 0 is least important, how important are the following when you are deciding whether to source from a particular foreign supplier.
Qualitative Research Findings - Organizational Buyers and Investors

Organizational Buyers Cont:

- **Respondent Quotes:**
  - “Heard that Morocco is a good resource for cotton products.”
  - “Major doubts” about the “capacity of Morocco to offer innovative products,” as well as “about the industry’s ability to produce at the necessary speed, respecting international regulations and quality standards.”
  - “I’m not sure that the FTA with the US will make up for the huge expenses related to producing there.” Morocco’s production needs to be “matched to a supply need.”

- 70% of the respondents declared they did not feel qualified enough to answer outsourcing questions.

- 18% of the interviewees said they would not source Moroccan products because they do not know enough about the country and its record as a reliable supplier.

- 6% said they might be interested.

- Another 6% said they are not in a position to make such considerations, not just because of lack of knowledge, but also because of a lack of decision power on such matters.

- One respondent stated that he had spent time in Morocco while on vacation, and that “It’s an interesting country, but not for doing business. It has no style.”

Organizational Investors:

- The interviewed investors could not take a stand on whether or not they will source from Morocco.

- There is very little knowledge about Morocco in terms of investment opportunities in the apparel industry.

- The general consensus among surveyed buyers/investors was that sourcing decisions would be made based on the kind of product that was offered and the sourcing structure. Bottom line: Any market will be considered as long as the needs can be fulfilled.
**Recommendations**

- Because so many consumers and buyers/investors do not have a preconceived notion about Moroccan fashion, there is a big opportunity for Morocco to shape a positive image by educating consumers on their apparel industry.

- With promotions targeting the American middle and upper classes, Moroccan brands have an opportunity to become regarded as a respectable brand name.

- MORE Trade missions from Morocco to the US and from the US to Morocco.
  - Promoted by the Government of Morocco in cooperation with the American Department of Commerce.
  - "More Investment, More Trade…. More Morocco!" should be emphasized.
  - Involvement of representatives of key sector organizations such as the Moroccan Association of the Textile and Clothing Industries (AMITH) in these trade missions.

- MORE global awareness of socially responsible practices within the industry.
  - Create a safe and secure working environment for its labor force.
  - A very powerful instrument that is today available is the United Nations (UN) Global Compact (see: http://www.unglobalcompact.org/), which involves numerous companies from all over the world in an effort to promote socially responsible behaviors.
  - Numerous companies from the Middle East have already signed up for this initiative (Egypt and Tunisia).

- Continue promoting a MORE skilled labor force.
  - The Moroccan Government has already started a campaign to increase level of training of its textile and clothing industry workforce.
  - Take advantage of any public occasions in which such achievements could be discussed (For example: Trade missions, press conferences, articles, interviews, etc.).

- MORE ease of gathering information about “Doing Business in Morocco,” and in particular about FDI opportunities.
  - The Moroccan Government and in particular the Minister of Commerce should expand the information provided to potential investors on their Web site, including increased information in English.
  - “Export.gov”
Recommendations Cont’d

- More international symposia (in Rabat, Casablanca or Marrakech) to discuss the opportunities and challenges of investing in Morocco.
- MATIC could play a significant role as well.
- Other general recommendations include:
  - Continue upgrading the industry’s infrastructure
  - Improve the tax structure and other regulations
  - Increase competitiveness at all levels
  - Continued investment in the technological upgrade of the sector to increase production flexibility and reliability of the sector

Exotic Elegance

- Promotion of Fashion Designers who can “speak” the language of Moroccan exotic elegance.
- Create Visibility on International Fashion Scene for Morocco’s Exotic Elegance, including New York, Paris and Milan.
- Celebrity Endorsements of Morocco’s Exotic Elegance.
  - They could create a “buzz” among the general consumers.
- Host Fashion Week/Trade shows that emphasize the theme of Moroccan Exotic Elegance.
- Create an awareness campaign that combines Morocco’s attractiveness as a tourist destination with the theme of Exotic Elegance.
  - Promotion could be channeled through:
    - Print and TV advertising the types of magazines that the Exotic Elegance campaign should target. For example: ornate architecture, sand beaches, dunes, palms, beautifully dressed woman and men in sophisticated colorful and trendy clothes, in a balanced combination of modernity and tradition, sophistication and pure lines, nature and urban scenarios.
New York University (New York, NY)

Industry: Fashion/Textile/Garments
Professor: Dr. Kamel Jedidi
Class Enrollment: 35 students
Class Title: Intro. to Market Research

Qualitative Research Methodology:
• 17 consumer one-on-one interviews
  ➢ Gender: 9 Males, 8 Females
  ➢ Ages: 26 to 59
  ➢ Education: High school to PhD
• 11 industry in-depth interviews (via telephone)
  ➢ Sample participants: Dir. of Sourcing and Product Dev. (Ann Taylor), Asst. Dir. of Operations (American Flyer), SR VP of Manufacturing (Liz Claiborne), The Gap, Asst. Fabric and Trims Notion Editor (McCall Pattern), VP of Design and Product Dev. (Ben Walker), Designer (Daniel Friedman), Merchandiser (Tri Coastal Design), Dir. Of Product Dev./Design for Juicy Couture Timepieces (Movado Group)

Quantitative Research Methodology:
• 138 consumer online surveys
  ➢ Participants: NYU students, friends and family members ages 25-45
  ➢ Geography: New York, New Jersey, Washington D.C.
Qualitative Research Highlights - Consumers

- 100% of the participants were familiar with the kingdom of Morocco.
- 89% of the participants believed that US and Morocco had a neutral-to-good political relationship. Only 11% (2 out of 17) believed that US and Morocco had a weak political relationship.
- 28% of the participants mentioned Textiles as an established Moroccan industry and 22% mentioned Tourism as another established Moroccan industry. The remaining 50% of responses were made up unique responses: casino, farming, consumer goods, handmade goods, coffee, and clothing.
- Only 1 out of the 17 participants is conscious of having purchased a Moroccan made product in the past. This participant had a strong positive experience with the Moroccan product and described it as being very comfortable and luxurious.
- With regards to future purchases:
  - 59% or 10 of the participants said that they would want to purchase Moroccan products.
  - 35% or 6 of the participants said that they would buy Moroccan products depending on product quality as well as product category.
  - One participant mentioned that they would not consider purchasing Moroccan electronics.
  - The remaining 6% (1 participant) indicated that they would never consider purchasing a Moroccan product, however did not provide a justification.
- Most important attributes in their clothing purchase decisions: 35% of the participants indicated style as an important attribute.
- 6 out of the 17 participants indicated that they looked at clothing tags just for reference. These participants indicated that they looked at tags not to exclude products based on country of origin but remember for future purchasing decisions.
- 100% of the participants indicated that they would consider price as a more important criterion than country of origin when making clothing purchasing decisions.
- Participants were asked to rank what they believe to be the quality of clothing from 5 different countries (China, US, Morocco, France, Turkey) on a 1 to 5 scale (1-bad, 5-excellent). Only 4 of the participants could not answer this question as they felt that they had insufficient knowledge. Morocco’s product quality ranking (2.78) was above China (2.38) but below France (3.92), Turkey (3.30), and the US (3.15).
Qualitative Research Findings - Industry

Key drivers of sourcing decisions:

Cost
- The most important criteria in selecting sourcing partners is cost.
- However, this does not mean that the lowest-cost producer will automatically be able to gain business. Businesses are extremely savvy, and factor in tariffs, shipping costs, and time to market as part of their total cost equation.

Finished Product Quality
- Quality concerns remain key in the industry. There was frustration expressed over the fact that manufacturers will present high-quality samples, and then prove unable to produce to the same level in large volumes. There is also a perception that some regions provide better quality overall than others.
- It is important to note that retailers do see some regions as “specialists” in certain types of products.

Responsiveness
- This category includes reliability, managerial talent, flexibility in responding to changing client needs, and communication with the client.

Proximity
- Ability to get the raw materials from the mills or ports to the manufacturing facility quickly and inexpensively was very important to the respondents. Proximity of the manufacturing facility to the US is another factor that participants considered. Generally, this was less important to the client, although it is definitely taken into consideration.
- Among the few respondents who sourced in Latin America, physical proximity to the US was seen as the key advantage. This was despite concerns over what is seen as lax management in factories and challenges in meeting scheduled deadlines.
Qualitative Research Findings - Industry

Free Trade Agreements:

Industry executives are aware of free trade agreements (FTA), and developments are closely followed and figure into the strategic planning process within sourcing divisions. However, a new FTA is not an automatic trigger for shifting production to a new area; switching costs are too high for this to be the case.

- Few of the respondents were aware of Morocco’s FTA with the US; those that were aware of it had not given any serious thought as to what it might do for the apparel manufacturing sector. Some believed that it would provide few benefits in the short term, but if the manufacturing sector as a whole is properly managed, the agreement could prove extremely beneficial in the long term.

- Among those who were aware of Morocco’s manufacturing sector, perceptions were generally favorable, although not enthusiastic. The country’s experience with cotton was mentioned, and a couple of respondents were aware that the country has long worked with European brands.

- Among the other respondents who have no direct experience with or knowledge of the country and its manufacturing industry, perceptions can be characterized mainly as related to an “exotic” image of Morocco: scents, smells, luxurious fabrics.

Perceptions of Morocco:

“No one’s referring to it as the best-kept secret in sourcing.”

“They’re very strong in the area of cotton manufacturing.”

“The product quality [from Morocco] seemed pretty good.”

- None of the respondents are currently sourcing in Morocco [note: The Gap does manufacture in Morocco; however, the respondent interviewed worked in the area of denim sourcing, which is not done in Morocco. His answers reflect this.]. As such, for the most part they had limited knowledge about the country and its manufacturing capabilities.

- Among those who were aware of Morocco’s manufacturing sector, perceptions were generally favorable, although not enthusiastic. The country’s experience with cotton was mentioned, and a couple of respondents were aware that the country has long worked with European brands.

- Among the other respondents who have no direct experience with or knowledge of the country and its manufacturing industry, perceptions can be characterized mainly as related to an “exotic” image of Morocco: scents, smells, luxurious fabrics.
Quantitative Research Findings - Consumers

Awareness of Morocco:

- 71% of respondents have heard of Morocco. Only 17% of respondents feel that they are very familiar with the country of Morocco. This entails knowing the country’s economic situation, major religion and political situation.
- 89% of respondents have never been to Morocco.

Perceptions of Morocco:

- 46% of respondents either agree or strongly agree that Morocco is a friendly country to the US.
- 16% of respondents feel that Morocco has a skilled workforce, while 27% feel that it does not.
- 83% of respondents either agree or strongly agree that Morocco has a textile/apparel industry.
- 67% of respondents perceive Morocco as having above average expertise in textile/clothing manufacturing.

Products:

- 56%, 59% and 58% of respondents perceive the quality of products made in Morocco is worse than that of the US, France and Italy, respectively.
- 64%, 48% and 42% of respondents perceive the quality of products made in Morocco is the same as that of Turkey, Egypt and Spain, respectively.
- 43% of respondents perceive the quality of products made in Morocco is better than that of China.
Quantitative Research Findings - Consumers

Clothing:
- 81% of respondents have never used country of manufacture as a factor in rejecting the purchase of item of clothing. The 19% percent who have rejected a clothing purchase mainly cited three reasons:
  - Child labor and sweat shops were identified.
  - Belief that the cheap cost of production in certain countries does not warrant the high prices charged for that article. Consumers felt cheated.
  - Low quality is associated with certain countries. Specific examples noted were India and China.
- 80% of respondents feel that fit is the most important attribute when purchasing clothing.
- 75%, 68% and 50% of respondents think that Banana Republic, Zara and Ralph Lauren, respectively, have some of their clothing made in Morocco currently.

Moroccan-made Clothing:
- Neutral to slightly positive perceptions of Moroccan-made clothing were seen in the survey.
- 62% of respondents perceive the fit (the most important attribute in purchasing clothing) of Moroccan-made clothing to be average, while 31% perceive it to be better than average.
- 66% of respondents perceive the style (2nd most important attribute in purchasing clothing) of Moroccan-made clothing to be average, while 31% perceive it to be better than average.
- Most important attributes were fit and style, followed by quality and price. Less important was brand name, and least important was country of origin.
Recommendations

Consumer:

• It is recommended that Morocco try to change the misguided perception that it primarily represents Middle Eastern culture.
• Advertising campaigns to promote Moroccan tourism might help to raise general awareness while increasing tourism revenues. Also, petitioning travel shows such as the “Globe Treker” to focus a show on Morocco, may be a low/no cost means of increasing awareness.
• Increasing trend toward “value (moral) driven purchasing.” Morocco may benefit from promoting itself as a country committed to maintaining high labor standards in clothing/textile manufacturing.
• Many consumers are aware that Banana Republic and Zara clothing is made in Morocco. Because Banana Republic and Zara are popular, well-liked brands in the US, it is recommended that Moroccan clothing manufacturers leverage this to create their own brands.

Industry:

SWOT Analysis

<table>
<thead>
<tr>
<th>Strengths:</th>
<th>Weaknesses:</th>
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<tr>
<td>• A history of working successfully with many European partners</td>
<td>• Limited awareness of Morocco’s capabilities among retailers</td>
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<td>• Where there is awareness of Morocco, a belief that the product quality is good</td>
<td>• Lack of proximity to the US</td>
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<td>• Belief that China is the best game in town in terms of balancing cost and quality</td>
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<tr>
<th>Opportunities:</th>
<th>Threats:</th>
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<tr>
<td>• A surprisingly high level of dissatisfaction with current sourcing partners: quality, reliability, responsiveness</td>
<td>• Geopolitical environment</td>
</tr>
<tr>
<td>• Reluctance among smaller retailers/customers to concentrate all of their manufacturing in one area</td>
<td>• Among large retailers, a move to consolidate sourcing</td>
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<td>• Apart from China, other Southeast Asian countries are gaining notice and aggressively going after business; India is a particular threat</td>
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<td></td>
<td>• Fashion is moving faster than ever – and manufacturers must understand that</td>
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**New York University Highlights**

**Recommendations Cont’d**

**Industry Cont’d:**

“*Morocco needs to show modernization, productivity, how we can get more for our money.*”

“*Morocco is not the closest, and it’s not the cheapest.*”

- Define goals for Morocco’s apparel manufacturing sector
  - Immediate goal should focus on building strong partnerships with key targets. Since smaller companies cannot reap the cost benefits that come from consolidating their contracts at one or more factories, they do shift production around more. However, given the high level of dissatisfaction expressed with current sourcing partners, there is a strong possibility that reliable, well-run factories that produce high quality goods and can communicate with customers will be attractive to retailers.

- Define Morocco’s competitive advantage – Quality
  - Cost cannot be the competitive advantage. Despite the advantages of the free trade agreement, given the intense level of competition from China (and Southeast Asia as a whole), cost is unlikely to become a key differentiator for Morocco. However, quality can be a differentiator. B2B marketing campaigns focusing on the quality of the product will be effective in driving interest.

- Invest in and demonstrate innovation
  - Show that Morocco has capabilities that set it apart from others, especially China. These may include, but are not limited to, needlework, stitching techniques, and new ways to assemble garments.

- Develop managerial talent
  - Morocco’s manufacturing community should ensure that Morocco has a highly professionalized managerial pool of talent. Ability to speak English fluently is the key. A strong manager understands their customer’s business. Managers should be sent to visit the US, meet and/or speak regularly with customers and key industry figures, and develop contacts within the industry that will help in gaining new business.

- Strengthen the country’s infrastructure
  - Customs, ports, roads – all are taken into account when making a decision on where to source. These factors will help convince customers that Morocco is an efficient place to do business.
New Mexico State University (Las Cruces, NM)

**Industry:** Moroccan Design/Materials

**Professor:** Ms. Michelle Jasso

**Class Enrollment:** 20 students

**Class Title:** Marketing 490 (Special Topics)

**Qualitative Research Methodology:**
- Industry Focus Group
  - Participants: Representatives from major tile and stone material merchandisers (Dal-Tile, Florida Tile and Ember Tile)
- Retail In-Depth Interviews
  - Participants: Buyers, distributors, purchasing directors, marble store owners, marble salesperson from stores that sell marble. Some included the owner of A&R Granite and Marble and the Buying Manager of Casa Mexicana Tile.

**Quantitative Research Methodology:**
- Survey (electronic and via telephone)
  - Participants: Commercial decision makers in the stone industry, specifically marble
  - Regions: California, Florida, Texas and Illinois
  - Gender: Males
  - Age: 40+
Qualitative Research Findings - Industry

- Dealers base their decisions on quality.
- Consumers seem to have a completely different motive. On the subject of color, the black sample were not appealing to the buyer. Lighter colored marbles might do better in the existing market in the SW.
- Most marble dealers use a distributor rather than going through a perceived hassle of buying direct. We recommend targeting the distributor rather than the dealer. If direct buying was still the goal for Morocco, competitive prices and quality would be critical.
- Sellers were interested in the finished marble goods (I.e. a desk or fountain). In particular, they suggested selling these with the flooring as a matching collection. This could be a great niche market for Morocco.
- Current members of the marble industry have little or no knowledge about either Moroccan marble or Morocco in general. Current associations with Morocco have repeatedly been tourism. Awareness would need to be the main component in a campaign.
- There was a relative willingness among the industry members to consider Moroccan stone. However, it was apparent that Morocco would need to reach the distributors first to break into the industry. Morocco would also need a competitive price and quality.

Countries currently doing business with research companies
Qualitative Research Findings - Retail

- Unanimously, there was no knowledge of Morocco and even less on Moroccan marble.
- Price, quality, and customer service are the main characteristics that subjects interviewed seemed to value the most when considering foreign marble. Color is also something very valued when purchasing marble.
- All the owners/purchasing directors interviewed demonstrated interest in Moroccan marble after students provided them with better knowledge of the product.
- There is a lack of knowledge of Morocco; the image of Morocco is exotic.
- There was definitely an emphasis on the need for Morocco to establish a marble warehouse to facilitate distribution.
- The main disadvantage on importing marble seems to be the long time - an average of two months in most cases - that it takes for the product to be delivered to the US buyer.
- Marketing strategies such as trade shows and appearance in trade magazines were highly recommended.
- Most subjects interviewed seemed to be very open towards the possibility of importing Moroccan marble, especially due to the fact that Moroccan marble can be unique, such as the examples of fossilized marble.
Quantitative Research Findings - Industry

- There is interest in Moroccan marble entering the US marketplace. However, Spain is already considered to be a consistent source for their imported marble.
- Tile, countertops, and flooring are top selling products in the marble market.
- The cost to conduct business with/in Morocco was of great concern to the participants. Before American companies begin conducting business with Morocco or ponder setting up operations in Morocco:
  - They want to be sure the country is comparably modern and capable of conducting business as they currently do.
  - They want to understand if Morocco’s distance will generate a proportional increase in prices once shipment is taken into account.
- Certain aspects that the buyers (surveyed) claimed to base their decision making process on ranged across availability, quality, and price being the most noted. Prestige and convenience were seemingly less important deciding factors.
- When asked if cheaper prices would attract their business to Morocco, response showed that these factors do make a difference.
- Prestige being the number one influencer, lower prices second, convenience third, availability fourth and quality last.
- Interest for finished marble goods versus raw material marble was considerably larger and could be a positive route to pursue as our preliminary research also confirmed the lack of businesses offering a “finished” product.
- The next key to success for Morocco will be to educate businessmen (and women) about Morocco accurately and precisely. Little is known of Morocco and what is known is being researched and found on the Internet.
- Data showed an almost even split between interested participants and uninterested participants toward doing business with or in Morocco.
Recommendations:

- Because there is little knowledge of Morocco, there doesn’t seem to be any negative perceptions of the kingdom in the minds of those surveyed. This could prove to be an advantage to Morocco over the competition.
- Pre-national branding, with strategic planning and successful national branding efforts can overcome all the bad perceptions.
- Focus on the positive traits of Morocco and its products.
- Exposing a positive image to the world will allow investors to have a better understanding of what Morocco can offer them.
- Use the Internet to educate interested parties about the potential opportunities available.
- Increase investor visits to look at available products.
- By taking advantage of the fact that little is known about Morocco, the Moroccan marble industry could position itself as a leader in quality and prestigious marble.
San Diego State University (San Diego, CA)

Industry: Moroccan Design/Materials
Professor: Dr. Don Sciglimpaglia
Class Enrollment: 4 students
Class Title: Consulting Project Group, MBA

Qualitative Research Methodology:
- In-depth Key Decision Maker interviews
  - 11 companies from San Diego Interior Design Expo
  - 6 telephone interviews
  - Company functions: Importing, distributing, retail, installation, estimation, construction and design
  - Positions: Owner, manager, sales representative, buyer and designer

Quantitative Research Methodology:
- Online surveys
  - 30 companies: Importing, distributing, quarry/fabrication and retail
  - 274 consumers: Residential property owners nationwide

In regards to awareness:
“I wasn’t aware that Morocco processed stone, I haven’t been contacted by any Moroccan companies that do the processing.”
“…we may even buy other marble that is from there (Morocco), but we get it all from Italy where it is processed.”
Qualitative Research Findings - Key Decision Makers

• In regards to setting up operations in Morocco:
  - Need more information about the Moroccan population; consumers’ interests in particular.
  - Those companies that worked with Morocco were satisfied with their experiences.

• Reasons against trade included: wrong stone colors and buying locally only.

• When ranking Morocco as a place to do business, most people ranked it 6 on a scale of 1 to 10 with 1 being the best place.

• Only 4 companies carried or bought Moroccan goods.

• All importers were aware that Morocco produced stone.

• There was a high association between fossilized marble and Morocco.

• The importers purchase based on look (what will sell) first, then price, quality and freight charges in that order.

• Most of the importers had not been approached by Moroccan companies.

• All dealt with a variety of countries (Brazil, Italy, Spain, Greece, Turkey, Portugal, China, Mexico, Peru, India and Taiwan) either from buying directly from the quarries or the processing centers.

• None of the importers bought Moroccan stone directly, although several thought that the stone that they purchased finished from either Italy or Brazil might have originated from Moroccan quarries.

• Individuals aware Morocco had processing capabilities surmised that the equipment was second rate compared to competitors.

• Only two companies were aware of the FTA agreement, and they both already carried Moroccan home furnishings. Both of these companies felt that the agreement would have an effect on their volume of business.

• Only about half of the other companies thought that the FTA might provoke trade with Morocco.

• Retailer of Moroccan goods, Sahara Designs. The owner himself is Moroccan and had many interesting insights on importing as well as the stone industry.
  - Little marketing of Moroccan stone in the US. He had recently been to “Coverings,” the largest flooring trade in the US, where there were both Turkish and Brazil stone exhibits, but not a single Moroccan exhibit.
  - He felt that there was a lot of growth in Morocco and there was a great demand for “Home Depots” in Morocco, and he was working on expanding his business in this direction specifically because of the FTA.
Quantitative Research Findings - Key Decision Makers

- Perception of factors that are most important to consumers’ purchase decisions: Quality, price, and customer service were the top three.

<table>
<thead>
<tr>
<th>Country</th>
<th>Quality</th>
<th>Price</th>
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<tbody>
<tr>
<td>Italy</td>
<td>1</td>
<td>Italy 1</td>
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<tr>
<td>Brazil</td>
<td>2</td>
<td>Spain 2</td>
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<td>China</td>
<td>4</td>
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<td>5</td>
<td>Morocco 5</td>
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<td>Morocco</td>
<td>6</td>
<td>Mexico 6</td>
</tr>
</tbody>
</table>

- Is stone quality strongly related to country of origin? Only 27% of respondents “agreed” or “strongly agreed”, yet 77% of respondents ranked Italy’s stone quality as #1 and 63% listed Morocco’s stone as #6.

- Lack of awareness that Morocco sells stone was the #1 reason for not purchasing from Morocco.

- When asked if they would consider purchasing Moroccan stone from Morocco (assuming equal quality with stone from other countries), 68% of respondents indicated they either “probably” or “definitely” would.

- When respondents compared Moroccan stone to stone from other countries, half indicated it was either somewhat unique or competitive with other countries, while half did not know how it was.

- 64% of respondents indicated that their customers never inquired about Moroccan stone.
Quantitative Research Findings - Key Decision Makers Cont’d

• When you think about locations in which to do business or set up operation, what comes to mind when I say “Morocco?”
  – While some participants felt that Morocco was progressive and that business negotiations would be easy, one felt that it would take bribes and that it would be hard to negotiate business transactions.

• What information, perceptions, or other sources shape your image of Morocco?
  – The most common response to this question was media. Also mentioned were Middle East conflicts, word of mouth, vacations, and WWII.

• If you are interested in selling into and being active in new markets, would Moroccan products or Morocco be interesting to you?
  – Approximately a fourth of the participants said “yes,” they would be interested (5 of 21), but there were almost as many that responded “no” (4 of 21). There was an interesting comment made that Morocco would have to be competitive with China’s pricing in order to be considered.

• How do you make your decision about sourcing items from overseas or working with overseas partners in their countries?
  – Seven participants stated that when finding a company to do business with, they would first meet with the company, see their establishment and their product and also check on their references before buying from them.
Quantitative Research Findings - Consumers

• When you think about “products to buy”…what comes to mind when I say “Morocco?”
  – A large proportion of the respondents (28.2%) could not relate any particular products with Morocco.
  – The second largest group thought of rugs or other woven floor coverings (13.7%). A proportionally large group did not understand the question entirely and answered what came to mind, but not with “products to buy.” Included in that group were those who answered “exotic.” Textiles, leather, stone, and tile were other common answers.

• If you purchased products manufactured overseas, would you be interested in products made in Morocco?
  – 46.2% replied, “yes,” while only 11.6% said “no.” Some of those against buying from Morocco were against buying any products from outside the US.
  – 6% said it would depend on the product while another 5% said it would depend on the quality and/or price.

• How do you make your decisions about purchases from other countries?
  – Over 67% of participants either stated they made their decision based on quality or price or simply stated that where a product came from was not a factor in their decision.
  – 12% made their decisions based on either political or human rights views of the country.
  – 10% relied on advice of either friends or experts when making a purchasing decision.
  – Those who purchased stone, ranked Morocco lower than Brazil with respect to their perceived quality.
  – Those who purchased stone were likely to have an annual income over $100K.
Recommendations

- Moroccan exporters need to direct resources toward making contacts and communicating with key players in the US industry through professional organizations, trade shows, and directly soliciting importers.
- Moroccan exporters can discover what changes they need to make in order to meet the demands of the US consumers.
- Morocco needs to focus on demonstrating that its stone products are not only available in all desired styles and colors, but also of equal quality and lower price.
- In regards to China, however, the price difference may not be significant. If this is the case then Morocco needs to demonstrate product superiority or uniqueness for the same price.
- It is hard to conclude quantitatively if the FTA will impact the competitiveness of Moroccan goods. Potentially, this is a win at all levels.
- Morocco will need to forge a positive image for trade with the US.
- A unique image of both the country and the product must be established.
- Branding should focus more on the statements they most strongly agreed with: having nice things, unique things, and meaningful experiences.
- Branding efforts should be focused on the most relevant target markets: Marketing channels should penetrate the luxury consumer market that makes an annual household income >$100K per year.
- A partnership-marketing program with a large warehouse store such as Lowe’s or Home Depot would be most effective.
- Create a favorable image as an investment opportunity.
- It is important to let US companies know about Morocco’s current investment incentives.
- MATIC should come up with a “guide” to help US companies starting businesses navigate the cultural differences as well as provide information on recent improvements in the economy.
- MATIC could also help link US and Moroccan investors in order to help overcome the language and cultural barriers.
Simon Fraser University (Burnaby, BC, Canada)

Industry: Hi-Tech/IT

Professor: Mr. Wayne Kondruk

Class Enrollment: 30 students

Class Title: BUS 442

Qualitative Research Methodology:
- In-depth interviewers via telephone or in-person
  - 17 Canadian high-technology organizations and companies that attended the Barbados trade symposium
  - Industries: aerospace, software, product development, manufacturing, and professional services for the IT industry
  - Respondents: VP Operations, Purchasing Manager, Head of Strategic Alliances, Chief Executive Officer, President, and Engineering Manager

Quantitative Research Methodology:
- E-mail survey
  - 43 companies participated
  - Participants: Decision-makers responsible for foreign investment and overseas product purchases with a degree of control over their company’s involvement in international business
Qualitative Research Findings - Industry

- Most of the respondents were involved in some overseas business activity, mainly in China; only one participant was involved in Morocco.

- Common reasons for investments in other countries were:
  - A growing economy, large market
  - Large and inexpensive labor force, competitive rates
  - Geographic location, infrastructure
  - Previous contacts
  - Stable economy, stable political and legal environment, and ethics
  - Culture and corruption

- The overall perception and awareness of Morocco was relatively low. A few respondents were unaware or had no knowledge of business operations in Morocco.

- The overall perception of Morocco’s business environment was its political instability and underdeveloped infrastructure.

- Its geographic proximity to Europe and its cheap labor was noted as positive business factors.

- The vast majority of companies were either not very interested or not at all interested in selling in Morocco and rated Morocco as a very poor or only fair place to do business.

- The majority of companies prefer to learn about the countries personally, either through a personal visit or a trade/industry presentation.

- A majority of participants do attend trade shows (83% of respondents). Therefore, this may be an effective means of contacting organizations in the IT industry.
  - Approximately 14% would rather be contacted through email, and another 14% would rather be contacted via mail.
  - Morocco is currently positioning itself as a hub to neighbouring economies; there is market share to grab because there is activity in the neighbouring countries:
    - 53% of companies sell products in both France and Spain.
    - Of the companies who do not sell products in France and Spain, the majority were professional service providers to the IT industry such as professional accountants and lawyers.
Quantitative Research Findings

- Companies will only invest in a country if they know about the conditions in that country.
- Morocco as a place of commercial opportunity is least known.
- Only 15% of the Canadian IT companies surveyed had business activity in or with Moroccan companies.
- 93% of the companies that do not have current business relation with Morocco stated that they were either unlikely or very unlikely of buying or sourcing products from Morocco.
- 95% of the companies stated that they were either unlikely or very unlikely to invest and/or consider a joint venture or partnership with companies in Morocco.
Recommendations

Factors That Will Encourage and Attract Investment:

- Promoting Morocco’s economy
  - Morocco needs to clearly demonstrate and promote the fact that it can offer a stable economic environment for high-tech/IT companies.

- Creating and Promoting Cost and Labor Advantages
  - Morocco will need to demonstrate that the costs of conducting business in Morocco are competitive relative to other foreign countries.
  - Morocco needs to promote the fact that it has a labor force of over ten million people and the average wage is approximately US$2.50 an hour.
  - It should also highlight any key education and training initiatives being undertaken to continue building a large, skilled workforce.
  - Incentives that will cut relative costs for businesses also need to be marketed.

- Emphasizing Geographical Advantages
  - Morocco needs to promote the accessibility that it offers through its central and critical location.
  - Morocco needs to put an increased emphasis on promoting the fact that it has free trade agreements with these countries (Spain, France) and can offer duty free access to and from European markets.

- Marketing the Legal Environment, Infrastructure and Political Stability
  - Morocco has instituted new commercial courts and is attempting to make the enforcement of contracts easier, which creates an improved environment for foreign firms and the need to promote the benefits of this process to foreign investors.
  - Market Morocco’s positive legal attributes, such as enforcement of intellectual property rights laws, demonstrating that the legal environment is conducive to foreign investments.
  - Quality of infrastructure is also an important criterion for high-tech/IT companies.
Recommendations Cont’d

Perceptions, Awareness Levels and Future Intentions:

• Building Awareness
  – Morocco’s first priority should be to build awareness of the kingdom.
  – Initial efforts should be concentrated on awareness campaigns, and not persuasive or overly detailed messages.

• Capitalizing on Positive Perceptions
  – Companies that did have perceptions identified two main positive factors: warm climate and accessibility.
  – Morocco also needs to position itself as a country with many business opportunities, having a central location.

• Overcoming Negative Perceptions
  – Unstable and undeveloped environment with poor infrastructure, political instability, and a great deal of economic risk.
  – Need to show that Morocco is a safe and reliable place to do business. Since some companies view Morocco as just another Middle East country, Morocco will need to differentiate itself from these countries.

• Developing Future Intentions
  – Marketing efforts must focus on creating awareness to encourage companies to invest in Morocco in the future; Morocco must create awareness of its potential for business.

Competition:

• Positioning Morocco
  – China, India, and Mexico, are seen as key competitors to Morocco.
  – It is recommended that Morocco conduct in-depth analysis of these countries’ operations and activities to determine where it may hold competitive advantages over these countries.
  – Differentiate itself based on these advantages, and hopefully attract some of the companies that are currently considering these other countries for business investment.
Recommendations Cont’d
Communication Methods:

• Contacting Companies
  – The trade/industry presentations and personal visits are the forms of contact most preferred by IT companies when being contacted regarding overseas business.
  – Morocco needs to engage in these methods of communication and ensure that they have a strong presence in major trade shows.
  – It is important that any presentations be made by representatives who are enthusiastic and knowledgeable.

• Shaping Perceptions
  – Morocco must focus on utilizing public relations to present a positive image of Morocco.
  – They need to ensure that the news stories that are reaching potential investors are stories that display business opportunities.
  – Develop positive relationships with local and foreign media, particularly in key markets.
University of Texas, Austin Highlights

University of Texas, Austin (Austin, TX)

Industry: High-Tech/IT
Professor: Dr. Kate Gillespie
Class Enrollment: 5 students
Class Title: Independent Study, MBA

Qualitative Research Methodology:
- 17 in-depth interviews with key decision makers or key influencers
  - Participants: Representatives of US-based high-tech companies that do and do not have current operations in Morocco and representatives of foreign companies, especially companies operating in high-tech markets that rival with Morocco, such as Taiwan and India

Quantitative Research Methodology:
- 62 online survey
  - Participants: Representatives from US-based high-tech companies which currently do and do not have operations in Morocco, “Influencers” in the field of foreign direct investment (Individuals from business centers and foreign investment consulting firms in the US)
  - Titles: Varied from CEOs to engineers to consultants in the industry
Qualitative Research Findings - Key Decision Makers

• Perceptions:
  – “Morocco isn’t on the radar” and “I didn’t know anything about it before I talked to you.”
  – Five associated Morocco with Middle Eastern/Arab countries, and three as Muslim.
  – Five people connected Morocco with the “third world.”
  – One consultant described the country as “poor, low-tech, [with] bad infrastructure.”
  – Two people said they were unable to connect Morocco to any technology or business-related ideas.
  – Three interviewees specifically mentioned corruption.
  – Interviewees brought up gambling, a young population, film industry, tribal instability, police, bad intellectual property laws, and proximity to Europe one time each.
  – One East Asian businessman connected Morocco to Taiwan’s past agriculture-based economy.

• The process by which outsourcing decisions are made:
  – Two people said the research process typically includes several visits to a country to appraise infrastructure, government operations, and universities.
  – One manager from a manufacturing firm said his company went to great lengths to get to know government officials in a new country and establish a good reputation for the firm.
  – One manager tests potential outsourcing locations by gradually exporting small operations and making final decisions based on those outcomes.
  – Two interviewees said that part of their company’s decision process involves looking at how other firms are doing in a potential destination and evaluating what another firm’s success or failure could mean for their operations.
  – Specific competitors: India and the Philippines, Romania, South America, Eastern Europe, and North Africa as notable regions that could pose a threat “given where most high-tech products are bought and sold” and Morocco did not figure in his mind as a potential player.
  – One interviewee said his company recently chose Morocco over Greece and Poland because its equipment was newer than its competitors.
  – “Morocco would definitely rank high as a forerunner as a potential gateway to the African market.”
  – A market analyst described Morocco as “[having] decent infrastructure, fairly transparent in its business/regulatory laws, but it’s hard to differentiate Morocco from the rest of the region.”
Qualitative Research Findings - Key Decision Makers Cont’d

- What firms look for in potential technology outsourcing sites:
  - Proximity to market and geopolitical security were each mentioned five times.
  - A skilled and stable workforce was mentioned three times, as were cheap labor and a workforce’s language skills.
  - Infrastructure, intellectual property laws, and safety of expatriate workers were each mentioned twice.
  - Two interviewees said low costs were very important in site selection, while two others said costs were not a serious issue.
  - Culture, output quality, bureaucracy, transparency, business environment, and a consumer base for technology-related goods each came up once.
  - Seven interviewees agreed that the biggest factor aiding Morocco’s appeal to US firms is its proximity to Europe.
  - Morocco was described as an entry point into Africa and a source of low-cost labor.
  - Other interviewees positively labeled Morocco as having a stable business climate for a high-growth area, better intellectual property laws than China, a young population, trade incentives, manufacturing opportunities, decent infrastructure, fairly transparent regulatory laws, and strategic transportation advantages related to its location.
  - Interviewees stressed Morocco’s positive attributes but gave suggestions for ways to improve their attractiveness, such as:
    - A sound marketing strategy (mentioned 7 times) as best way to make Morocco better known.
    - Morocco needs to place itself “on the map.”
    - Develop investment-friendly policies and offer tax incentives.
    - Inform potential investors of Moroccan laws - “US companies have a cowboy mentality…if they fail in 18 months, they want to fire everybody and leave. Maybe [Morocco] has very favorable hiring and firing laws, but companies don’t know this - there is a lot of ignorance.”
    - Improve transparency, infrastructure, labor market skills and trim Morocco’s bureaucracy.
    - Advocate improving intellectual property laws to protect investors.
    - Morocco’s success depends heavily on experiences of firms currently outsourcing because of the influential nature of business to business contact.
    - Improve education, security and output quality.
    - Nurture service-related businesses, (English) language proficiency, create strong local technology base to attract investment, improve political organization and structure, forge links with other companies/countries currently involved in IT industry, build on existing infrastructure from Morocco’s film industry and focus on how to attract European firms.
Quantitative Research Findings

- 69% are from companies that currently sell products, either directly or indirectly, in France or Spain.
- 56% are from companies that directly or indirectly participate in trade fairs.
- Morocco is not even “on the radar screen.”
- 68% of respondents are “unsure” if they trust Moroccan government.
- 62% are “unsure” if Morocco is a safe environment for foreign workers.
- Morocco suffers from obscurity rather than ignobility, in terms of its image.
- 64% of respondents were “unsure” if Morocco is “competitive” as an investment site among developing countries.
- 88% of respondents indicated that they did not believe that Moroccan investment incentives to American companies are well-known.
- The majority of high-tech respondents do not recognize the geographic advantage of Morocco.
- 32% marked that Morocco is “marginal” in terms of its overall attractiveness as a high-tech investment site.
- Respondents from companies that are currently directly or indirectly selling products in Spain or France rated Morocco as “Average” than any other choice.
- There is a minimum threshold for the quality standard of labor that must be met for an investment site to be seriously considered; above this skill level threshold, the variable “cost reduction” becomes significant.
- Successful experiences of key industry players significantly alters the outlook that companies have on an investment site.
- “Morocco is a uniquely attractive channel to the European market for American investors.”
  - 47.6% agreed with the statement in companies that sell products directly or indirectly to France and Spain and have over 500 employees.
  - 16.7% of respondents representing companies that currently sell products to France or Spain and have less than 500 employees agreed with the same statement.
  - This suggests that access to the European market is dependent on the ability of a firm to leverage its size in entering a foreign market or making an outsourcing decision.
- “Strength and enforcement of intellectual property and patent laws is more important than the host government’s transparency: 79.2% of the respondents indicated that they either “agree” or “strongly agree” with the statement.
Discussion of Quantitative & Qualitative Results

The Unsure Effect:
- “Unsure effect” is a phenomenon where average high-tech decision makers are “unsure” or unaware of Morocco as potential site for overseas ventures.
- This “unsure effect” hinders US-based high-tech companies from considering overseas ventures in Morocco and slows overall economic development.

The “Casablanca” Effect:
- A very general image of Morocco does exist.
- Superficial understanding of Morocco influenced by public image of the greater Middle East.
- The international media has also contributed to Morocco’s current image. In an article published by Variety Magazine, John Hopewell portrayed Morocco as a politically antiquated desert nation ideal for shooting movies that require unique terrain (Hopewell, 2005).
- Media’s portrayal of Morocco as an aesthetically pleasing, but underdeveloped, nation is not helpful in recruiting high-tech industries.

The Halo Effect:
- During many of the interviews, respondents indicated that Morocco was an unattractive location for conducting business because it harbored the potential for terrorism and violence.

Site Selection Decision-Making:
- When a decision-maker compares business processes internally and externally to consider outsourcing, key concerns are: labor, market accessibility, IPR protection, and incentives.
- According to the respondents with knowledge of Morocco, scale economies are critical to a favorable outsourcing decision, and availability of high-quality labor pool is a pre-requisite for an offshore location.
- Personal experience, business associates, and consultants/market research are the most influential sources.
- Need to concentrate efforts on making current US companies in Morocco promoters of the kingdom to their peers. This is the “buzz” effect.
University of Texas, Austin Highlights

Discussion of Quantitative & Qualitative Results Cont’d

High-tech Competitors:
- “US firms invest abroad to serve foreign local market, rather than producing goods to export to the US. Some do establish overseas operations to replace US exports or production, or to gain access to raw materials, cheap labor, or other markets.”
- Morocco: “It’s unknown. So much focus in my industry has been on India that I haven’t considered, researched, or even seen advertisements for Morocco.”
- Israeli government offers generous assistance to high-tech and other companies to subsidize R&D and capital spending, while generous tax incentives are available.
- Morocco will have to take advantage of the initial momentum created by the FTA by pursuing an agenda of compliance in regards to intellectual property in order to distinguish itself from the competition.

Influential Variables:
- Costs figure prominently in this matrix but our data indicates it is not the most important factor in a company’s decision to outsource its operations.
- Importance of ICT infrastructure, education/skills of workforce, labor costs, operating costs, regulatory environment, proximity to market, political stability, and strong intellectual property laws.

High-tech Peculiarities:
- Intellectual Property Rights:
  - Primary barrier is poor intellectual property rights (IPR) protection.
  - 79% indicated they “agree” or “strongly agree” that “strength and enforcement of IP and patent laws is more important than the host government’s transparency.”
  - The high-tech industry is fast moving and it breeds constant innovation.
- Off shoring:
  - Skill level trumps low cost labor as an investment decision variable.
  - “Sometimes companies begin off shoring for cost reasons but continue for quality of work reasons.”
  - Companies are willing to incur extra cost for highly skilled and educated workers.
Recommendations

UT Brand Morocco developed seven strategic initiatives that will not only help Morocco overcome the many challenges previously described, but will also help jumpstart Morocco’s success in the high-tech industry.

Recommendation One: The Product Initiative:

- Give US companies a product they can’t refuse.
- Set up an external commission to evaluate the capability of the IT sector to ensure that efforts are focused and effective. This external commission will help Morocco fully determine its core competencies in the IT sector.
- Develop the particular segment which it is best poised to attract and sustain increased foreign investment.
- Continue efforts to enhance skilled workforce.
- Ensure success of programs such as the training complex for off shoring and Information Technologies business and strategy for e-Morocco will help Morocco meet the needs of US companies and offer a value proposition that US high tech firms simply cannot refuse.

Recommendation Two: The Stewardship Initiative:

- Give US businesses a reason to love Morocco…and to tell their friends!
- MATIC and GOM should develop an internal agency that links with all US businesses operating in Morocco that would work closely with MATIC as it works to attract new businesses. The agency should be able to supply MATIC with names of current delighted investors and purchasers that can be used as case examples to entice new businesses; and identify -- and hopefully solve -- problems that could discourage future US high-tech business ventures in Morocco.

For long term investments, having the protection and incentives of a Free Trade Agreement with the U.S. is more important than a country’s current IT infrastructure. 52 respondents
Recommendations Cont’d

Recommendation Three: The Diaspora Initiative:

- MATIC should tap into the potential of the Moroccan-American tech community by consolidating Moroccan Diasporas in the US and Canada, and help initiate and facilitate a network of technology professionals of Moroccan origin.
- Provide a forum where organizations can come together to form an active, consolidated Diaspora community that can create the most powerful and influential marketing mavens and corporate buzz leaders for Morocco in the US.
- Services to this community could include:
  - A colorful monthly e-newsletter including:
    - Member profiles and contact information.
    - A profile of a tech professional in Morocco.
    - Articles about tech issues in the US or global market.
    - Most importantly, updates on tech advances and opportunities in Morocco so that this community can be well-informed and inspired buzzers.
  - An annual meeting in Washington D.C. hosted by MATIC
    - Panels on high-tech careers in the US.
    - Panel on high-tech advances in Morocco.
    - Panels on Morocco-US relations.
    - Reception at the Moroccan Embassy.
  - A membership list/monitored list-serve
    - Members can contact each other about employment or partnership opportunities, events, etc.
    - MATIC can generate a very useful list of potential buzzers for special mail-outs and targeted promotion.
Recommendations Cont’d

Recommendation Four: The Compliance Initiative:

- Most competitors deliver a similar message, touting skilled labor, low costs, and participation in many bilateral and multilateral agreements.
- The compliance with and the enforcement of intellectual property laws is a problem that Morocco shares with all its competitor countries, and is an ideal on which no competitor country is well differentiated.
- By being proactive with intellectual property compliance, Morocco could create a reputation for itself, put itself on the high-tech corporate radar, and benefit from good buzz.
- Most importantly, Morocco will not be competing with “compliance clutter” from competitor nations.
- Morocco does not have to be perfect in regards to intellectual property protection to put itself on the map. Specific steps could include the following:
  - Contact Microsoft and tell them that Morocco is serious about intellectual property compliance and would like Microsoft’s help in improving compliance in Morocco: Morocco’s proactive stance in such an uncontested space should get their attention.
  - In order to reap the most advantage from such actions, MATIC could oversee the US publicity side of the Moroccan Compliance Initiative. MATIC could become active in the Society of Corporate Compliance and Ethics. This society brings together corporate managers dealing with compliance issues (promotional opportunity).
  - MATIC could also look for opportunities in Washington DC to sit on business-government committees dealing with compliance issues, or even volunteer to start such a committee.

Recommendation Five: The Gateway Initiative:

- Show US high-tech that Morocco is the gateway to the French-speaking world.
- Our research suggests that US companies seeking a French-speaking site to service Francophone Europe may also be thinking of a site to service Francophone Africa as well.
- Morocco may be well served by packaging itself as a cost-effective site to handle many countries at once.
- If demand takes off, Morocco might consider special educational programs to assure that the numbers of qualified Moroccans fluent in French are available to meet growing demand.
Recommendations Cont’d

Recommendation Six: The Academic Initiative:

• Morocco should look to develop relationships with scholars, academics and educators in the US.
• Much of this academic literature translates into perceptions within the international business community.
• Morocco can gain direct access to tomorrow’s business and political leaders, securing positive perceptions for the long term.
• MATIC should look to promote Morocco’s value proposition through:
  - Relationships with top US business schools
  - Research grants to scholars and students
  - Funding international forums and conferences for academics
  - Cooperative efforts with Study Abroad offices at universities
  - Publicity through student travel organizations (STA Travel)
  - Scholarships for students interested in graduate studies concerning Morocco

Recommendation Seven: The Promotion Initiative:

• MATIC should launch a promotion campaign entitled: “Morocco: It’s not just Casablanca.”
• Promotional material would also highlight some of Morocco’s competencies. These could include:
  - High skilled, low cost labor
  - Gateway to the French-speaking world
  - Proximity to European markets
  - Accommodations suitable for business travelers
• Media could include:
  - Advertisement in top technology magazines: Popular Science and Technology Review
  - Promotional pieces in business magazines: Forbes, BusinessWeek, Fortune, The Economist
  - Educational programs in high traffic media sources: Discovery Channel and National Geographic
  - Print advertising in international airports
On June 5, 2006, two (2) teams were invited to MATIC headquarters to present to MATIC top executives and industry experts. The top team was San Diego State University and the second place team was George Washington University. First place was awarded $1,000 and second place $500.
inside BUSINESS
SDSU College of Business Administration

SEPTMBER-OCTOBER 2008

Student News

SDSU MBA students win 2nd Place in Morocco Research Competition

Last month, marketing professors Ron Huybers and Lisa Doan allowed the winning MBA students to compete in the 2008 National MBA Research Competition. Twelve teams from across the United States, Mexico, and Canada participated in the competition, along with a 2,000-member team of Moody’s Analytics and Moody’s Investors Service. The SDSU team was represented by two members of the class of 2009, including Liam O’Connor and Harris Dyer. The team was led by Ron Huybers, who served as the team advisor. The SDSU MBA program was selected as one of the six finalists for the competition, and the final winner was announced at the annual MBA Conference in San Diego. The SDSU MBA program has been ranked among the top 20 programs in the nation by The Wall Street Journal and Bloomberg Businessweek.

The students presented their research results to the Moroccan American Trade and Investment Council (MATIC) in Washington D.C. on June 8th, along with the second place team from George Washington University. MATIC is an American-based, not-for-profit association that promotes the economic development and trade interests of the United States and Morocco. The competition was sponsored by Bertolino Partners and it was the first ever international business student competition.

Business Fraternity Recognized at the National Level

Kappa Alpha Psi, the national Black sorority and professional education business fraternity, received national status at the national level. Kappa Alpha Psi, which was founded at the University of California, Berkeley, in 1911, currently has more than 100 chapters and 12,000 members worldwide. SDSU’s Kappa Alpha Psi chapter was named the national chapter of the year in 2007 and was recognized as one of the top 10 chapters in the country. The fraternity was awarded the title of national chapter of the year at a special event held at the organization’s national headquarters in Washington D.C.

The chapter was recognized for its outstanding leadership, community service, and academic achievement. The chapter has volunteered more than 20,000 hours to various community organizations and has raised more than $5,000 for various charitable causes.

My Two Weeks at Business Camp

BY TRACY CLARK, SDSU PR Hit

My name is Tracy Clark, and I am attending SDSU. My field of study is Marketing, and I am a Junior. I was chosen to attend the business camp held at SDSU in May of this year. The camp was held for one week in March, and I was chosen to attend based on my performance in my classes. The camp was a great opportunity for me to learn more about business and make new friends. I was able to meet other students who were also interested in business, and we were able to work together on various projects. The camp was held on campus, and we were able to attend various workshops and presentations. The camp was an excellent experience for me, and I hope to attend again in the future. I would definitely recommend this camp to other students who are interested in business. 

The camp was held for two weeks, and we were housed in the Shasta Village on the campus of SDSU School of Business. The Shasta Village is a residential community that offers housing for both undergraduate and graduate students. The camp was attended by more than 200 students, and all students were selected for the program.

The students received free rooms and board and took two field trips outside of the city. As a minority student, I was able to participate in the program and meet other students from different backgrounds. The program was a great opportunity for me to learn more about business and meet new people. 

The camp was a mix of different events, such as guest speakers, panels, and workshops. The guest speakers were diverse and included business leaders, entrepreneurs, and academics. The panels were led by SDSU faculty and students, and they covered various topics, such as marketing, business ethics, and leadership. The workshops were interactive and hands-on, and they were designed to help students develop their skills in various areas of business. The camp was a great opportunity for me to learn more about business and meet new people. I would definitely recommend this camp to other students who are interested in business.
GW Business School Students Finish Second in National Case Competition About Improving Trade Between Morocco and the United States.

July 10, 2006

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GW BUSINESS STUDENTS FINISH SECOND IN NATIONAL CASE
COMPETITION ABOUT IMPROVING TRADE BETWEEN MOROCCO 
AND THE UNITED STATES

Graduate Students Create Marketing Plan to Brand and Promote Moroccan Apparel Industry

WASHINGTON — Students from The George Washington University School of Business recently placed second in a nationwide competition to improve trade relations between Morocco and the United States. The competition, which was sponsored by the Moroccan American Trade and Investment Council and organized by i2Rent Ventures, enabled students to enhance their understanding of the Middle Eastern apparel market.

"We recognize that Morocco will not be competitive with China in general commodities; however, there are opportunities in niche markets where well-designed and branded Moroccan products can be competitive in the U.S. marketplace," said Thodore Smith, president of the Moroccan American Trade and Investment Council. "The GW team developed a marketing plan to help this vital Moroccan industry succeed in the vast and increasingly competitive U.S. apparel market. The University should be congratulated for developing students with the capabilities deployed by the team that represented them in the brand Morocco Research Competition."

GW and the University of San Diego emerged as the top two teams among the 15 schools represented in the six-month competition. GW's team developed a marketing plan to enable the Moroccan apparel industry to capitalize on the recently signed Free Trade Agreement with the United States. In May 2006, two students from the team, Valentia Marano, M.A. '06, and Lail Kimbrough, M.B.A. '08, finalized the marketing plan and presented the plan to the national competition. Throughout the competition GW's team emphasized their marketing mantra: "More Investment, More Trade, More Morocco: Brining Your Customer Unandidate Elegance!"

GW's participation in the competition began in January 2006 in a graduate-level international marketing class taught by Lail Kimbrough, assistant professor of international business and international affairs. "When most students hear the term the Middle East they think about war or oil. But the apparel industry is a vital industry for Morocco and many other Middle Eastern nations," said Kimbrough. "These students seized the opportunity to apply classroom theory to a real-world business setting, offering the Moroccan apparel industry with key insights about the U.S. market. This kind of experience is what makes GW a center for excellence in the field of international business."

"This project allowed us to learn about Morocco in-depth, in a manner not commonly found during traditional class projects," said Kimbrough. "This type of initiative represents a great opportunity for anybody who is just about to enter the real business world."

Marano commented, "Looking at Morocco through the prism of commerce has been a very enriching experience, our hope is that this project will help the American market understand that Morocco is a great place to do business."

Pamela K. Bigichi, GW School of Business senior associate dean and professor of operations and supply chain management, saluted GW's success in the Brand Morocco Research Competition. "Forums like this offer real opportunities in our students to delve into global business issues in depth and thus help us prepare our students better for managing organizations in today's competitive global environment," said Bigichi.

The Brand Morocco Research Competition is one of the many exciting international business-related activities taking place at GW. The University recently established a Center for International Business Education and Research through a four-year, $1.37 million grant through the U.S. Department of Education. The Title VI program provides funding to further international business education, language training, and research capabilities to promote U.S. competitiveness. U.S. News and World Report has ranked GW's undergraduate and graduate international business programs among the top 25 in the United States.

The Moroccan American Trade and Investment Council is an American based, non-profit trade association that assists the Kingdom of Morocco in its quest to promote economic growth and stability through its private sector.

i2Rent Ventures facilitates programs designed for students and educators, while recognizing the need of marketing, branding, research, and recruiting access to campuses across the country. Its programs are designed to meet industry, government, and education objectives.

GW's School of Business prepares students for professional management careers. The depth and variety of its academic and professional programs, including five specialized master's programs, provide rich opportunities for students in the school's core Bachelor of Business Administration, Master of Business Administration and doctoral programs.

For more information about GW's School of Business, visit http://business.gwu.edu.
For more information about i2Rent Ventures, visit www.i2rentpartners.com.
For more news about GW, visit the GW News Center at www.gwnetwork.com.

GW -

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www.gwu.edu/news/newsreleases
Recommendations

Below are recommendations for future research programs from both EdVenture Partners and MATIC.

1. Focus on fewer target markets. It was difficult for some industries to focus on consumers in addition to key decision makers. Other industries did not have this added component, which made it an unfair playing field when it came to judging. In addition, some industries also focused on investors, buyers and sourcers which totaled four different research targets. Determine the target market that will bring the client most benefit and focus only on one or two total target markets.

2. The classes had a difficult time with sectors of each industry. For example, design materials included stone, leather, wood products, crafts and ceramics. Students had the option to get sector-specific or keep the research broad. It works best to be very specific with students and not leave this as an option.

3. Set clear, quantifiable expectations with the students. The guidelines and expectations were too vague. For example, give a goal of 3 key decision maker interviews with the buyers, sellers and investors of large companies, for a total for 9. Since students are not experts in these industries, everything must be laid out for them in the beginning.

4. The most useful research came from the in-depth interviews with industry key decision makers. The least useful was surveying the student body.

5. Let faculty and students determine methodology rather than EVP telling them exactly what to do. The faculty are the experts and we don’t want to inhibit them from participating or from being creative with new methodologies.

6. Internet surveys were not as helpful, especially with Surveymonkey. The qualitative research met the client objectives more than the quantitative.

7. The students could have contacted Europe branches or other multi-national companies with contacts in the US.

8. Have students create summary of research results and recommendations. Too time consuming to read through each report to pull out key pieces.

9. Do not include secondary data in final report. Client already knows this information. This will provide students more time to focus on the results and recommendations.

10. Require students to attend client conference call. This was made optional, but each class should attend so client can stay updated on progress and help where research is lacking.
Did the program meet your expectations? Why or why not?

“I expected it to be challenging, and it was. I think it will be a great thing to talk about during interviews and to add to my resume.” - Melissa Nunez, University of Illinois

“It provided me with a unique chance to experience a wonderful research process that was challenging and enriching.”
- Valentina Marano, George Washington University

“No. First of all, I entered this project with some trepidation. I don't think MATIC was as well-informed about research as the private-sector firms that you usually deal with. They also didn't seem to get it about finding business respondents rather than students as research subjects. Things that were said sometimes shocked me and made me wonder what was going on. The time frame of the project was too short. We had to do qualitative research concurrently with quantitative research instead of sequentially. The turnaround time for MATIC/EdVentures approvals put added stress on the timetable. To manage this we were lining up business respondents while waiting for approval. Consequently, we had to respond to queries about, where was the survey? as we waited for approval.” - Faculty

What were some of the challenges you faced during the program?

“Definitely securing interviews and focus groups for the qualitative research. It was hard to get people to participate, which made for small sample sizes.” - Melissa Nunez, University of Illinois

“In the beginning, when the entire class was working on secondary research, other than the websites MATIC provided, we really didn't know where else to get our research. MATIC provided us with 5 objectives, and I felt like it was difficult to research some of them. Being students, I don't think we have access to the same resources and databases as people from MATIC do, and so that counts against us. Also, I was part of the Quantitative Group, and it was extremely difficult getting food companies to take our survey. My group and I contacted over 200 companies, and we only got about 30 of them complete the survey.”
- Student, University of Illinois

“Gathering sufficient amount of data -- it was difficult.” - Student, San Diego State University

“The project involved a very demanding research process -- in the end a very rewarding one, though!” - Valentina Marano, George Washington University
Program Feedback

Are there any other aspects of the program that you found to be beneficial?

“The final presentation prepared me to make professional presentations and worked on my public speaking skills.”
- Ashley Anderson, Florida State University

“I had not done very much real world advertising research, and this program helped me to have the opportunity to do that.”
- Student, University of Illinois

“Being a real world experience, it teaches students about more than just the educational topic. It teaches them about dealing with clients handling someone else's budget, having your work approved by an outside source. It is a great experience for them.”
- David Gilliland (faculty), Colorado State University

What would you consider a strength of the program?

“Very detailed instructions so we didn't have to second-guess ourselves during the project.”
- Anna Maxbauer, UT, Austin

“The seriousness and influence that the project has.”
- Student, Washington University in St. Louis

“The involvement and large scope of the program, it commanded the use of all of the marketing and research skills that I learned this semester and in previous ones.”
- Student, Washington University in St. Louis

“Working with international liaisons.”
- Ashley Anderson, Florida State University

“I really liked working on separate teams and working for a real client.”
- Student, University of Illinois

“I think the ability to work with actual clients instead of something a professor just thought up themselves made this project much more realistic as well as much more interesting.”
- Melissa Nunez, University of Illinois

“Guidance & Support from both EdVenture Partners and the Client throughout the term; a lot of information & useful resources provided.”
- Irina Sytcheva, Simon Fraser University
**Program Feedback**

**What would you consider a weakness of the program?**

“Definitely the lack of time we have. We only have one semester, which is 5 months, and I feel like it was too much of a time crunch. 5 months was not enough time to do the type of work that we needed to do and to do it well. If we had more time, I think we could have done more research.” - Student, University of Illinois

“It is my hope that the client and Edventure Partners are able to clearly express their exact objectives and goals of the project. This is key, in order for the students to work in the direction they should move in”. Leif Kindberg, George Washington University

“Slow start - client did not clarify what they wanted.” - Student, Simon Fraser University

“The amount of work and depth that needs to be done in such a short amount of time.” - Student, Colorado State University

**What is one suggestion you can offer the Program Facilitator to improve future programs?**

“Hold phone conference with client earlier on.” - Student, Simon Fraser University

“Make sure the client knows more precisely what they want to know.” - Elizabeth Brummer, Colorado State University

**What did your Program Facilitator do that made the biggest positive impact on you, your organization and/or program outcomes?**

“She was young and we related to her well. No one was afraid to call her or anything. She was also very available. I think we called her at 3 am one time and she answered and helped us.” - Ashley Anderson, Florida State University

“Julie Loustalet was phenomenal. She was prompt, informed, professional at all times. She really helped us in that she was very quick to get our info/requests up and back down the ladder of approval. Please give her CSU's thanks”. - David Gilliland (faculty), Colorado State University

“Having a liaison like EdVenture Partners between the client and the university saves professor's time and energy.” - Faculty
Any additional comments about your overall experience?

“This has real life application and involvement which most other classes shy away from. I'm able to see the results of the work and then learn from true criticism to improve upon in the future.” - Student, Washington University

“I do not have experience with other marketing internships but believe this to be a phenomenal experience for anyone whom is interested in applying their energy to such a creative and energizing opportunity!” - Leif Kindberg, George Washington University

“The Brand Morocco had barely any guidelines to go by, which left me and my team fishing for what the client actually wanted from us. It was very unclear. If we could have gotten a grasp on it before it was half way over, we probably could have double our results.” - Ashley Anderson, Florida State University

“It's hard to say, I really thought that the program needs a lot more structure to it. But at the same time, because it was so unstructured, we as students were forced to guide ourselves through everything.” - Student, University of Illinois

“I've had two previous internships, and for both internships, I felt as if I was more of an assistant than an intern. I was delegated, so-to-speak, the grunt work. I liked the fact that I worked with my peers and that we had all to do our part of the work. I really felt like I was part of a team and that I really contributed to our overall project. It's not like one of those group projects where one person does all the work while four others just watch.” - Student, University of Illinois

“One big suggestion: We feel that we lost our competitive edge because the program was structured so tightly. I understand that you have to represent a client and to ensure you get them a good final product. However, by setting so many rigid requirements it allows less creativity in the research. There was little in your guidelines that we did not already do, or at least had thought of (and maybe ruled out due to certain constraints). I'd let the individual schools have a bit more freedom.”
- David Gilliland (faculty), Colorado State University

“Great program overall, I was very impressed. It is a very valuable opportunity for students to experience the real world project. THANK YOU!” - Irina Sytcheva, Simon Fraser University
Appendix

1. Faculty Welcome Letter
2. Product Brief
3. Design Materials Industry Visit Outline
4. Textiles Industry Visit Outline
5. Processed Industry Visit Outline
6. IT Industry Visit Outline
7. Manufacturing Industry Visit Outline
8. Semester Overview
9. MATIC Required Questions
10. SAA Judging Scorecard
11. SAA Presentation Judging Scorecard
December 1, 2006

Dr. Kate Gillespie
International Marketing Faculty
University of Texas, Austin
McCombs School of Business
Austin, Texas 78712

Dear Dr. Gillespie,

Welcome to the Brand Morocco Research Program. I am very pleased you have chosen to participate in this initiative.

The Moroccan American Trade and Investment Council, on behalf of the Kingdom of Morocco, has high expectations for this program and we are hopeful that it will accomplish a number of objectives. The first has particular importance to you as an educator, as it is our goal to provide your students with a real-world experience that translates directly into hands-on skills. Hopefully, this will prove invaluable to your students’ career endeavors. From years of practical experience, we know how beneficial contextually based learning can be, especially when students are provided with an actual client, objectives and resources.

Also, we know your students are uniquely qualified to help us better understand how well Brand Morocco is positioned in the minds of Commercial Decision Makers and Consumers within the five industry sectors that we have chosen for this assignment. We are especially interested in sharing your students’ findings with our Moroccan colleagues in regards to key factors which impact the consideration and purchase of Moroccan goods, as well as issues affecting overseas investment decisions by American companies. Helping our Moroccan colleagues better understand these factors will have a positive impact on Moroccan economic development and job creation.

Working in partnership with the EdVenture Partners team, you will have my full support as we encourage your students to help us with the exciting task of discovering how best to define Brand Morocco in the minds of the American market. I would like to personally thank you for your willingness to take on the challenges of the Brand Morocco Research Program, and I look forward to visiting with you in your classroom once the program is underway.

Sincerely,

Theodore R. Smith, Ph.D.
President
Moroccan American Trade and Investment Council
Product Brief

Client Product Brief

Client: Moroccan-American Trade and Investment Council (MATIC)
Client URL: http://www.moroccobritaintrade.com
Product Title: Brand Morocco Research Program
Semester: Spring 2009
Issued By: Rachel Moore
New/Existing Program: New Program

Section I: Overview

Target Market:
Who are we researching?
- Commercial Decision Makers in all potential firms in
  pertaining industries that are considering overseas ventures,
  and Consumers in those sectors where appropriate
  - High Technology
  - Fast Fashion Textiles/Garments
  - Fast Food Manufacturing
  - Automobiles
  - Consumer Goods
  - Aircraft
  - Ceramic, Stone, Leather, Wood Products
  - Process Foods/Specialty Foods
- Firms that have no, little or significant knowledge about
  Moroccan marketplace
- Firms currently not located in Morocco
- Consumers of above products

Why are we researching?
- Help the Moroccan business community identify level of
  knowledge about Morocco currently held by Commercial
  Decision Makers and Consumers (as appropriate) in target
  industry sectors
- Increase economic activity in Morocco through investment in
  the Moroccan marketplace, and expand economic and political
  stability
- Provide potential American companies with exposure to the
  Moroccan marketplace
- Identify potential investors in the Moroccan marketplace, and
  encourage American companies expanding internationally to
  consider Morocco as a viable option rather than investing
  in other countries
- Provide data to inform design of the Brand Morocco National
  College Case Study Competition to be held fall semester
  2006, the goal of which will be to design effective marketing
  strategies to promote Brand Morocco to the target markets

Why now?
Morocco - U.S. Free Trade Agreement:
On July 22, 2004, The United States Senate, by a vote of 85 to 13,
approved the Morocco - U.S. Free Trade Agreement. The agreement
covered a wide range of topics that particularly benefit America's
manufacturers and farmers. On the first day that the Morocco - U.S.
Free Trade Agreement goes into effect (January 1, 2006), 95 percent of
the two-way trade in industrial and consumer products will be without
customs duties. U.S. farmers will also find additional opportunities, especially
in grains and meat products. And Morocco has made broad
commitments to open its service sector, creating new opportunities for
U.S. building, insurance, telecommunications, and technology
companies.

Competition
International markets offering similar advantages. Depending on the
industry this can vary.
- Spain, Turkey, Jordan, China, Eastern Europe
- Slovakia, Romania, Hungary

Note: Competitive advantage:
- There is high upside potential for American companies to
  penetrate the Moroccan marketplace with American goods (i.e.,
  grocery stores, etc. do not currently carry many American
  products)
- American products can be shipped duty-free to Morocco then
  sold into the European market duty-free (a cost-effective way
  for American companies to penetrate the European market as
  well)

Key Research Guidelines
Using the following topic areas to provide context:
- Economics
- Cultural Values, Belief Systems, Language and Religion
- Government/Political Structure and Environment, Social
  Institutions
- Trade Issues/FTA
- Risk
- Education, Skilled Labor
- Labor/Employment, Laws
- Tax System and Regulatory Environment
- Technological Environment and Infrastructure
- Geography, Climate, Natural Hazards
- Competitive Environment
- Infrastructure and Associated Costs
- Research and assess the topographic characteristics of potential
  investors and consumers (as appropriate) to determine overall
  awareness and interest in Morocco, and Morocco-made products.

Product Review
Client is interested in improving awareness as well as identification
of potential partners to expand the Morocco market (both product
manufacture and supply side).
## Section II: Challenges

### Research Objectives
Find out what potential investors know and do not know and why, uncover how to get them to know more.

1. Provide insights to Morocco on factors that will encourage and attract target segments to purchase and invest in Morocco.
2. Determine what image is consistently being communicated and interpreted, and how the target segment perceives it.
3. Identify what attributes about investing in Morocco are important and why they are important to the target market.
4. Determine whom the target segment defines as the primary competitor to Brand Morocco.
5. Determine whom the target segment defines as the primary consumer candidate (demographic and psychographic profiles) — for those industry sectors where consumer data is relevant.

### Other considerations
If a potential investor does not know anything about Morocco, then:

1. Determine what is needed to get them interested in Morocco.
2. Determine the factors that get them interested in investing in other countries.
3. Uncover potential misconceptions or stereotypes held about Morocco.

*Companies which are not currently investing internationally but have the potential to can also be researched.

Identify the perceived risks in the marketplace that need to be overcome.

## Section III: Research Recommendations

### Qualitative Recommendations
Utilize questionnaires to determine psychographics in the following settings:

- Interview with key decision maker(s) of company within respective industry
- Focus Group discussion with decision makers and/or influential staff that are from respective industry
- Focus Group discussion with consumers that purchase products from respective industry

*If applicable depending upon industry sector being studied.

## Section IV: Deliverables

### Deliverables
- A written narrative report containing charts and graphs representing findings, an analysis of research results, and any strategic recommendations to be provided to MATIC.
- A PowerPoint presentation summarizing research methods utilized and significant findings, to be utilized for in-person final presentation with MATIC representatives.
- Student teams will provide the raw data set in electronic form on CD-ROMs (i.e. Excel or SPSS format) and coding schemes, as well as the original transcripts.
- Teams from (TBD) number of campuses will also be invited to participate in the final presentation competition, to be held in Washington, D.C. in June.

### Client: Moroccan American Trade and Investment Council (MATIC)

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### Product Title: Brand Morocco Research Program

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### Date: 5-Jan-06

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**Brand Morocco Research Program**

**Industry Visit Outline: Moroccan Design Materials:**

- Stone, Leather, Wood Products, Crafts, Ceramics

**Time:** 20 minute presentation followed by Q&A

**Preparation:** PowerPoint is optional

**To Bring:** If applicable and available, bring samples and/or pictures that relate to industry

Below are some tips for making the industry visit effective and beneficial for everyone.

**What To Cover in the Industry Visit**

- Introduce the assigned industry to the program students
- Help the participants understand the advantages of doing business with Morocco
- Explain any challenges doing business with Morocco
- Mention the infrastructure in Morocco
- Review the 5 required questions the students must ask while conducting research
- Allow the students plenty of opportunity for Question and Answer

**Introduction**

1. Introduce yourself and give summary of background

2. Define the Moroccan design industry with which you are familiar (it’s no problem to limit your presentation to select sectors) – what are the general statistics about number of companies and scope of activities, volume of exports, amount of investments, types of products exported and to whom – the list can be very important in terms of Morocco exporting stone to Italy for refinishing and exports

3. Define target populations for research by the students; e.g., consumers, buyers, or potential investors. For example, the design sector would include:
   - Consumers of fashionable/exotic design materials
   - Residential/commercial interior designers
   - Residential/commercial interior design centers
   - Wholesalers to the trades for design products
   - Buyers for stores/chains that sell design products Shoppers of specialty stores

**Opportunities in the Design Products Industry**

- Companies that may want to invest in Morocco to process/package design items for US and regional markets such as the EU or North and West Africa
- If you know, mention how FTA affects this sector

**Challenges to Increase Exports or Attract Foreign Investors**

- What’s unique to doing business in Morocco (small scale of production, unique items with limited replication, communicating in French, domination of industry with existing buyers in EU, etc.)
- Rationalizing/aggregating production and processing, quality of support industries such as packaging, transportation, human resources, lack of marketing skills
- Provide insights of other challenges and “must knows” to doing business in Morocco

**Five Required Questions**

Remind students of 5 required questions they must ask.

For Companies:

1. When you think about locations which to do business or set up operations...what comes to mind when I say “Morocco”?
2. What information, perceptions, or other sources shape your image of Morocco?
3. If you are interested in selling into and being active in new markets, would Moroccan products (or Morocco) be interesting to you?
4. How do you make your decisions about sourcing items from overseas or working with overseas partners in their countries?
5. Whether or not you have ever done so, using whatever scale you want, how do you rank Morocco as a place to do business?
Design Materials
Industry Visit Outline

For Consumers:
1. When you think about "products to buy," ...what comes to mind when I say "Morocco?"
2. What information, perceptions, or other sources shape your image of Morocco?
3. If you purchase products manufactured overseas, would you be interested in products made in Morocco?
4. How do you make your decisions about purchases from other countries?
5. Whether or not you have ever used a product from Morocco, how do you think you would you rate the quality of Moroccan products, using whatever scale you want?
Textiles Industry Visit Outline

Brand Morocco Research Program

Industry Visit Outline: Fashion, Design, Textiles, Apparel

Time: 20 minute presentation followed by Q&A
Preparation: PowerPoint is optional
To Bring: If applicable and available, bring samples and/or pictures that relate to industry
Below are some tips for making the industry visit effective and beneficial for everyone.

What To Cover in the Industry Visit

- Introduce the assigned industry to the program students
- Help the participants understand the advantages to companies doing business with Morocco
- Explain any challenges doing business with Morocco
- Mention the infrastructure in Morocco
- Review the 5 required questions the students must ask while conducting research
- Allow the students plenty of opportunity for Question and Answer

Introduction

1. Introduce yourself and give summary of background
2. Define the Moroccan fashion/apparel industry with which you are familiar (it's no problem to limit your presentation to select sectors) – what are the general statistics about number of companies and scope of activities, volume of exports, amount of investments, types of products exported and to whom – the last can be very important in terms of distinguishing opportunities
3. Define target populations for research by the students, e.g. consumers, buyers, or potential investors. For example, the design sector would include:
   - Consumers of fashions
   - Buyers for retail stores
   - Buyers for wholesale outlets/trade centers
   - Wholesalers to the trade
   - Buyers for stores/chains that sell related products

- Companies that may want to invest in Morocco to produce items for US and regional markets such as the EU or North and West Africa
- If you know, mention how FTA affects this sector

Opportunities in the Design Products Industry

1. Based on existing production, what are the opportunities
2. Based on market needs, are there niche markets or new products for Moroccan products for companies/manufacturers to consider
3. Incentives, if any, Morocco has for promoting this sector (government programs, FTA, special financing, etc.)
4. Remind them that trade associations/Web sites are on the student website

Challenges to Increase Exports or Attract Foreign Investors

1. What's unique to doing business in Morocco (small scale of production, unique items with limited replication, communicating in French, domination of industry with existing buyers in EU, etc.)
2. Rationalizing/aggregating production and processing, quality of support industries such as packaging, transportation, human resources, marketing skills
3. Provide insights of other challenges and “must knows” to doing business in Morocco

Five Required Questions

Remind students of 5 required questions they must ask.

For Companies:

1. When you think about locations with which to do business or set up operations... what comes to mind when I say “Morocco?”
2. What information, perceptions, or other sources shape your image of Morocco?
3. If you are interested in selling products from or being active in new markets... Would (Moroccan products) or (Morocco) be interesting to you?
4. How do you make your decisions about sourcing items from overseas or working with overseas partners in their countries?
5. Whether or not you have ever done so, using whatever scale you want, how do you rank Morocco as a place to do business?
Textiles Industry Visit Outline

For Consumers:
1. When you think about “products to buy,” what comes to mind when I say “Morocco”?
2. What information, perceptions, or other sources shape your image of Morocco?
3. If you purchase clothing manufactured overseas, would you be interested in products made in Morocco?
4. How do you make your decisions about purchases from other countries?
5. Whether or not you have ever purchased a product from Morocco, how do you think you would rate the quality of Moroccan products, using whatever scale you want?
Process Foods
Industry Visit Outline

Brand Morocco Research Program
Industry Visit Outline: Specialty/Processed Foods

Time: 20 minute presentation followed by Q&A
Preparation: PowerPoint is optional
To Bring: If applicable and available, bring samples and/or pictures that relate to industry
Below are some tips for making the industry visit effective and beneficial for everyone.

What To Cover in the Industry Visit
- Introduce the assigned industry to the program students
- Help the participants understand the advantages to companies doing business with Morocco
- Explain any challenges doing business with Morocco
- Mention the infrastructure in Morocco
- Review the 5 required questions the students must ask while conducting research
- Allow the students plenty of opportunity for Question and Answer

Opportunities in the Food Industry
1. Based on existing production, what are the opportunities
2. Based on market needs, are there niche markets or new products for Moroccan agribusiness to consider
3. Incentives Morocco has for promoting this sector (government programs, FTA, special financing, etc.)
4. Remind them that trade associations/Web sites are on the student website

Challenges to Increase Exports or Attract Foreign Investors
1. What’s unique to doing business in Morocco (communicating in French?)
2. Rationalizing agriculture/aggregating production and processing, quality of support industries such as packaging, transportation (no direct shipping to US)
3. Provide insights of other challenges and “must knows” to doing business in Morocco

Five Required Questions
Remind students of 5 required questions they must ask.

For Companies:
1. When you think about locations which to do business or set up operations, what comes to mind when I say “Morocco”?
2. What information, perceptions, or other sources shape your image of Morocco?
3. If you are interested in selling into and being active in new markets, would Moroccan food products be interesting to you?
4. How do you make your decisions about sourcing items from overseas or working with overseas partners in their countries?
5. Whether or not you have ever done so, using whatever scale you want, how do you rank Morocco as a place to do business?
For Consumers:

(Alternative questions to above for these 3 industries: Fashion, Moroccan Design and Foods)

1. When you think about "products to buy," what comes to mind when I say "Morocco?"
2. What information, perceptions, or other sources shape your image of Morocco?
3. If you purchase products manufactured overseas, would you be interested in products made in Morocco?
4. How do you make your decisions about purchases from other countries?
5. Whether or not you have ever used a product from Morocco, how do you think you would rate the quality of Moroccan products, using whatever scale you want?
IT Industry Visit Outline

Brand Morocco Research Program
Industry Visit Outline: Information Technology

Time: 20 minute presentation followed by Q&A
Preparation: PowerPoint is optional

Below are some tips for making the industry visit effective and beneficial for everyone.

What To Cover in the Industry Visit

• Introduce the assigned industry to the program students
• Help the participants understand the advantages to companies doing business with Morocco
• Explain any challenges doing business with Morocco
• Mention the infrastructure in Morocco
• Review the 5 required questions the students must ask while conducting research
• Allow the students plenty of opportunity for Question and Answer

Introduction

1. Introduce yourself and give summary of background
2. Define the IT industry - what are the general statistics about number of companies and scope of activities - cover all three sectors: manufacturing, off-shoring/ call centers and back office services; investments made by local and international companies. [MATIC can provide some of this data]
3. Define target populations for research by the students, e.g. companies that use call centers/off-shoring/back office services; equipment manufacturers, or potential investors for programming/distribution,
   • Companies that are looking for support for their IT services/products
   • Companies that produce overseas and are looking for more efficient, less expensive options
   • Companies that may want to invest in Morocco for programming or manufacturing for regional markets such as the EU or North and West Africa
   • Other opportunities that you think make sense for this project to research
   • If you know, mention how FTA affects this sector

Opportunities in the IT Industry

1. Based on existing activities, what are the opportunities
2. Based on market needs, niche markets that Morocco should focus on
3. Incentives Morocco has for promoting this sector (government programs, FTA, special financing, etc.)
4. Opportunities created by human resource pool in Morocco
5. Remind them that trade associations/Web sites are on the student website

Challenges to Increase Exports or Attract Foreign Investors

1. What’s unique to doing IT business in Morocco [Spanish? French?]
2. Sufficiency of trained human resources
3. Adequacy of infrastructure
4. Provide insights of other challenges and “must knows” to doing business in Morocco

Five Required Questions

Remind students of 5 required questions they must ask.

For Companies:

1. When you think about locations which to do business or set up operations, what comes to mind when I say “Morocco”?
2. What information, perceptions, or other sources shape your image of Morocco?
3. If you are interested in setting into and being active in new markets, Would [Moroccan food products] (or Morocco) be interesting to you?
4. How do you make your decisions about sourcing items from overseas or working with overseas partners in their countries?
5. Whether or not you have ever done so, using whatever scale you want, how do you rank Morocco as a place to do business?
Manufacturing Industry Visit Outline

Brand Morocco Research Program
Industry Visit Outline: Manufacturing

Time: 20 minute presentation followed by Q&A

Preparation: PowerPoint is optional

To Bring: If applicable and available, bring samples and/or pictures that relate to industry

Below are some tips for making the industry visit effective and beneficial for everyone.

What To Cover in the Industry Visit
- Introduce the assigned industry to the program students
- Help the participants understand the advantages to companies doing business with Morocco
- Explain any challenges doing business with Morocco
- Mention the infrastructure in Morocco
- Review the 5 required questions the students must ask while conducting research
- Allow the students plenty of opportunity for Question and Answer

Introduction
1. Introduce yourself and give summary of background
2. Define the Moroccan manufacturing sectors with which you are familiar (It's no problem to limit your presentation to select sectors) – what are the general statistics about number of companies and scope of activities, volume of exports, amount of investments, types of products exported and to whom – the last can be very important in terms of exports tied to investors
3. Define target populations for research by the students, for example, the manufacturing sector would include:
   - Company buyers of off-shore production for US domestic markets
   - Company buyers of off-shore production for export markets
   - Companies that may want to invest in Morocco to produce items for US and regional markets such as the EU or North and West Africa
   - If you know, mention how FTA affects this sector

Opportunities in Manufacturing
1. Based on existing production, what are the opportunities
2. Based on market needs, are there niche markets or new products for Moroccan manufacturing to consider for local production or to attract investors
3. Incentives, if any, Morocco has for promoting this sector (government programs, FTA, special financing, etc.)
4. Direct them to the student website for trade associations and government statistics
5. Other FTAs that make a difference to investors (e.g. EU, Turkey, others)

Challenges to Increase Exports or Attract Foreign Investors
1. What’s unique to doing business in Morocco (scale of production, communicating in French, minority of industry by exporting buyers in EU, etc.)
2. Quality of support industries such as packaging, transportation, human resources, marketing skills
3. Provide insights of other challenges and “must knows” to doing business in Morocco

Five Required Questions
Remind students of 5 required questions they must ask.
For Companies:
1. When you think about locations from which to outsource production or to set up operations, what comes to mind when you say “Morocco?”
2. What information, perceptions, or other sources shape your image of Morocco?
3. If you are interested in buying from, sourcing from, or being active in new markets, how would you evaluate the attraction of Morocco?
4. How do you make your decisions about sourcing items from overseas or investing with overseas partners in your country?
5. Whether or not you have ever done so, using whatever scale you want, how do you rank Morocco as a place to do business?
Brand Morocco Research Program: Overview

What the program entails:
- Form a fully functional research group
- Manage a $1,000 budget
- Conduct objective based research for a real client
- Meet and be supported by your client
- Create strategic recommendations based on your research
- Follow business protocol and communication approval process
- Implement approved ideas and strategies
- Demonstrate the success of your research by creating a final report and presenting to representatives of MATIC
- Enter to compete against 9 other schools for the opportunity to present to MATIC and top Kingdom of Morocco officials in Washington D.C.

Timeline of the project:

- Program Launch (CFO Visit)
- Secondary Research
  - (Industry Visit)
  - Method Development
  - Compile Data
  - Identify Trends & Recommendations
- Qualitative Implementation
  - (Client Conference Call)
  - Quantitative Implementation
  - Wrap-up/ Final Presentation
MATIC Required Questions

Required Questions

For Companies:
(All industries)

1. When you think about locations which to do business or set up operations...
   What comes to mind when I say “Morocco”?
2. What information, perceptions, or other sources shape your image of Morocco?
3. If you are interested in selling into and being active in new markets...
   Would [Moroccan products] or Morocco be interesting to you?
4. How do you make your decisions about sourcing items from overseas or working with
   overseas partners in their countries?
5. Whether or not you have ever done so, using whatever scale you want, how do you rank
   Morocco as a place to do business?

For Consumers:
(Alternative questions to above for three industries: Fashion, Moroccan Design and Foods)

1. When you think about “products to buy,”...what comes to mind when I say “Morocco”?
2. What information, perceptions, or other sources shape your image of Morocco?
3. If you purchase products manufactured overseas, would you be interested in products made in
   Morocco?
4. How do you make your decisions about purchases from other countries?
5. Whether or not you have ever used a product from Morocco, how do you think you would you
   rate the quality of Moroccan products, using whatever scale you want?
Brand Morocco Research Program
Final Competition
Presentation Judging Criteria

University:
Judge:

Judging Sheet Instructions
Use this judging sheet to evaluate the presentation of the research project carried out by the student team. There are 7 criteria to be judged as well as potential bonus points based on their performance during the Q&A period. Students have 25 minutes to make their presentation followed by 10 minutes for Q&A. Timeliness is important so please keep your comments and questions succinct and to the point. Once you have evaluated and assigned points, please add up the total score and include it in the space provided at the end of the judging sheet. Some of the judging categories are subjective and may require further inquiry and/or debate. There will be ample time following both presentations to meet with the students and their faculty members to discuss their experiences in carrying out this research project.

Brand Morocco Research Program Objectives

Primary Objectives:
Find out what potential investors and consumers know and do not know and why, uncover how to get them to know more.

1. Provide insight to Morocco on factors that will encourage and attract target segments to purchase from and invest in Morocco
2. Determine what image of Morocco is consistently being communicated and interpreted, and how the target segment perceives it
3. Identify what attributes about investing in or purchasing from Morocco are important and why they are important to the target market
4. Determine whom the target segment defines as the primary competition to Brand Morocco
5. Determine whom the target segment defines as the primary consumer candidate (demographic and psychographic profiles) – for those industry sectors where consumer data is relevant
## SAA Judging Scorecard

<table>
<thead>
<tr>
<th>Research</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional Appearance</td>
<td></td>
</tr>
<tr>
<td>(10 points)</td>
<td></td>
</tr>
<tr>
<td>Presentation of Qualitative and Quantitative Research</td>
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<tr>
<td>(10 points)</td>
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<tr>
<td>Overall Creativity of Research Methods</td>
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<tr>
<td>(15 points)</td>
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<tr>
<td>Integration of Research Content into Presentation (Covered Client Objectives)</td>
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<tr>
<td>(25 points)</td>
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<tr>
<td>Clarity of Speech</td>
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<td>(10 points)</td>
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<tr>
<td>Realistic Recommendations Provided to Client</td>
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<td>(15 points)</td>
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<tr>
<td>Overall Fulfillment of Client Objectives</td>
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<tr>
<td>(15 points)</td>
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(100 Points Possible) Score: _______

Feel free to add or deduct points based on the Q&A.  

TOTAL SCORE: _______
Brand Morocco Research Program
Competition Judging Criteria

University:
Term: Spring
Year: 2006
Judge:

Judging Sheet Instructions

Use this judging sheet to evaluate basic criteria for each section of the research program, and the overall presentation of results. There are 3 sections, worth 50, 25, and 25 points respectively, making 100 the maximum point total possible. Once you have evaluated and assigned a point total for each section, please add up the total score and include it in the space provided at the end of the judging sheet. Some of the judging categories are subjective and may require further inquiry and/or debate.

Brand Morocco Research Program Objectives

Primary Objectives:

1. Provide insight to Morocco on factors that will encourage and attract target segments to purchase and invest in Morocco
2. Determine what image is consistently being communicated and interpreted, and how the target segment perceives it
3. Identify what attributes about investing in Morocco are important and why they are important to the target market
4. Determine whom the target segment defines as the primary competitor to Brand Morocco
5. Determine whom the target segment defines as the primary consumer candidate (demographic and psychographic profiles) — for those industry sectors where consumer data is relevant
# SAA Presentation Judging Scorecard

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<tr>
<td>Student Approach to Brand Morocco Research Task (5 points)</td>
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<tr>
<td>Quality of Quantitative Research (5 points)</td>
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<td>Quality of Qualitative Research (5 points)</td>
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(50 Points Possible) Score: ______

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(25 Points Possible) Score: ______
## SAA Presentation Judging Scorecard

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<tr>
<td>Sequence, Relevancy and Concise Content (15 Points)</td>
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<td>Appendix Contents (All Raw Data Included) (5 points)</td>
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(25 Points Possible) Score: __________

Total Score (100 Points Possible): __________