



OMNIBUS MARKETING RESEARCH & CONSULTANCIES

Shift to English in Morocco

BRITISH COUNCIL

APRIL 2021



Commissioned by the British Council and conducted independently by Omnibus Marketing Research & Consultancies

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1

BACKGROUND AND OBJECTIVES



Commissioned by the British Council and conducted independently by Omnibus Marketing Research & Consultancies

BACKGROUND AND OBJECTIVES

- The British Council is the United Kingdom's international organisation for cultural relations and educational opportunities. Its goal is to create connections, understanding and trust between the people of the United Kingdom and other countries. The British Council makes a positive contribution to the United Kingdom and the countries where it works through arts, culture, education and the English language.
- The objective of this report is to deliver insights on the appetite and demand for the English language among the next generation in Morocco.
- The study aims to answer the following key questions:
 - How is English perceived by young people in Morocco?
 - What is the perception and status of English in comparison to French?
 - If the favourability of English is growing among youth, why is this happening?
 - What are the needs of young people with regard to the languages they use?
 - How can the potential of English to improve the life prospects of Moroccan youth be optimized?
- Findings are based on an online survey of 1,211 persons aged 15-25 in urban areas of Morocco. Interviews were conducted between 16th and 29th March 2021.



2

MAIN FINDINGS



Commissioned by the British Council and conducted independently by Omnibus Marketing Research & Consultancies

MAIN FINDINGS AND INSIGHTS OF THE STUDY

English is growing rapidly in importance among Moroccan youth, who regard it as vital for unlocking educational, career and cultural opportunities.

- Young Moroccans believe it is more important to learn English than Arabic or French. 40% of respondents believe English is the most important language to learn, compared with only 10% for French. English is considered slightly more important to learn than Arabic, with 65% and 62% respectively believing each language is either the most important or an important one to learn.
- Young people are much more likely to recommend that their friends, family and colleagues learn English than either Arabic or French.
- The reasons why English is considered so important lie in the perception of it as a global language which is vital for education, employment, travelling, and accessing knowledge, news and culture.

Younger, wealthier and more educated youth have the strongest command of English. Online platforms and apps are becoming increasingly important platforms for language learning.

- Arabic is the dominant language among Moroccan youth, spoken and understood with high proficiency by 69% of young people. French is slightly more widely spoken than English - 34% speak and understand French with high proficiency, and 30% speak and understand English to the same level.
- Those with high levels of English proficiency tend to be younger, more educated and to have higher incomes than those with lower proficiency levels. They are also slightly more likely to be female.
- While schools, movies and TV series have hitherto been the predominant platforms for young people to learn English, in future they would prefer to learn via the internet, language apps and private language schools.

MAIN FINDINGS AND INSIGHTS OF THE STUDY

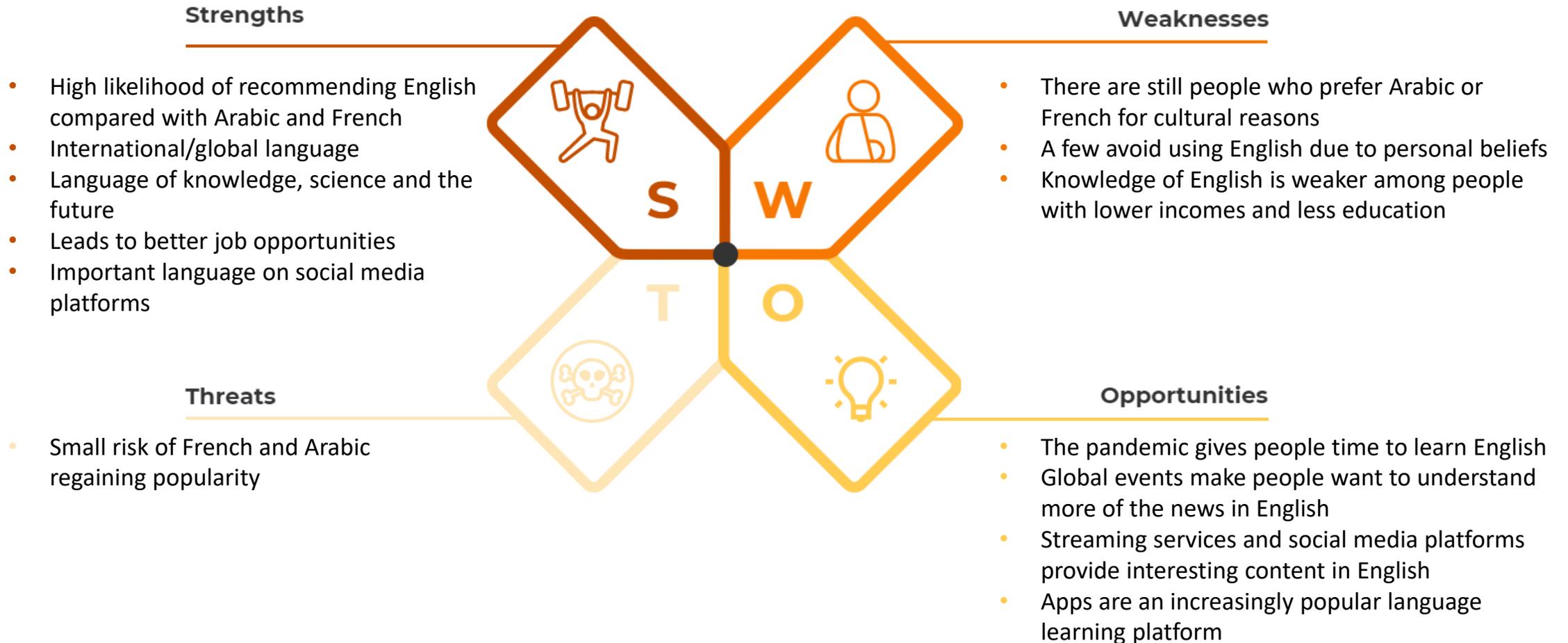
Young people most often encounter English online and in the media.

- Although English is growing in importance, French continues to have an equal influence in the daily life of young Moroccans.
- English is most often engaged with on the internet; in movies, music and TV series; and in the news and other media.
- 16% of young Moroccans use online educational platforms to access English.

English is expected to become Morocco's primary foreign language in the next five years, as well as the foreign language most widely spoken among youth. Young people are strongly in favour of the switch from French to English, a move they see as beneficial to both the country as a whole and young people themselves.

- 85% of respondents expect the number of young Moroccans speaking English to increase in the next ten years, with 57% expecting the number to increase greatly.
- While 50% expect the use of French also to increase, only 23% expect it to increase greatly, and 21% expect it to decrease.
- More than two-thirds of young Moroccans believe English will replace French as the country's main foreign language in the next five years. Respondents are highly supportive of such a move, with 74% agreeing with it. They believe it will benefit the country economically and provide a major boost to young people's life and career prospects.

SWOT ANALYSIS FOR ENGLISH VERSUS ITS COMPETITORS



RECOMMENDATIONS FOR MAINTAINING AND DEVELOPING THE PERCEPTION AND POTENTIAL OF ENGLISH BASED ON THE SWOT ANALYSIS

Building on Strengths

- Maintain momentum by informing young people about the advantages of English for education, jobs, communication and innovation.
- Combine English language teaching with employability skills training, including use of social media for strengthening employability.

Tackling Weaknesses

- Make the argument that knowing English does not make you less Arabic or French.
- Encourage young people to think in terms of the advantages of mastering English.
- Make efforts to disseminate English language learning beyond elite groups.

Addressing Threats

- Although English has great momentum, only 30% speak and understand it with a high proficiency. Meeting the demand for English learning will ensure that they are not put off the language.

Maximizing Opportunities

- Offer more online courses during the pandemic, perhaps via an app, and advertise on social media.
- Include media and social media content in English courses, including news, movie clips and music.





3

PERCEPTION OF LANGUAGES

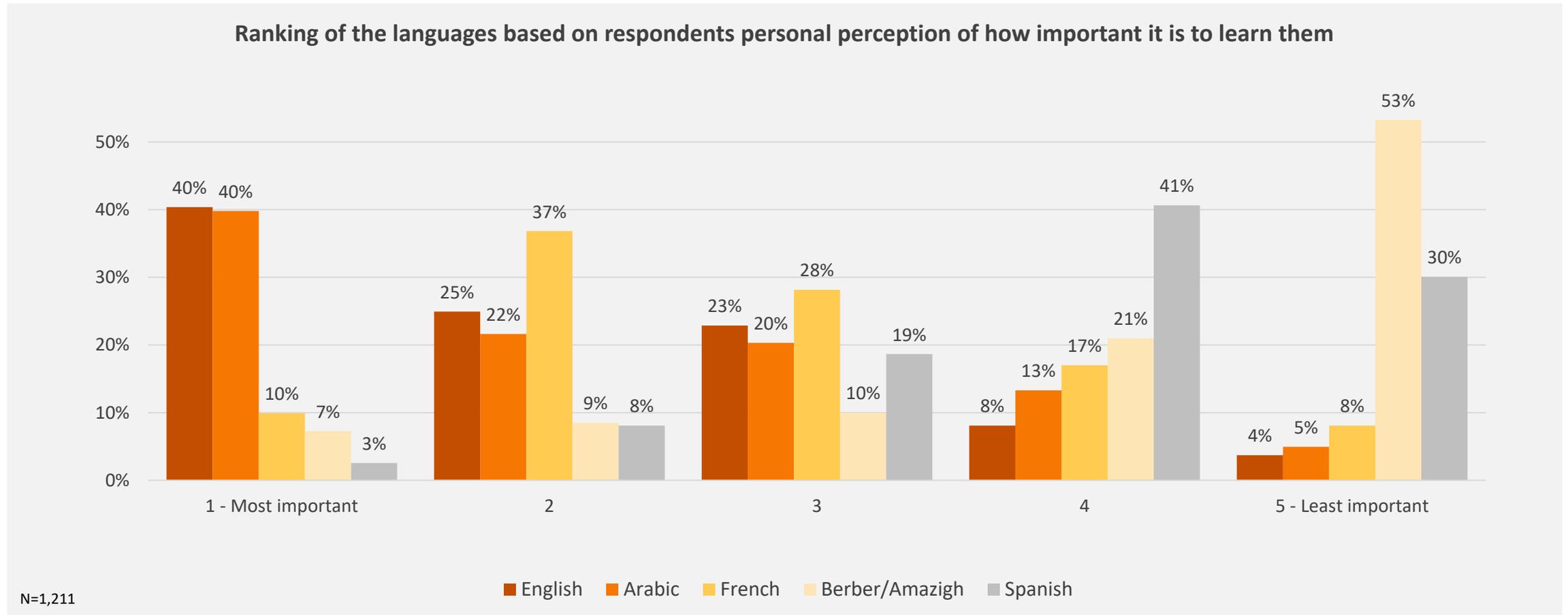


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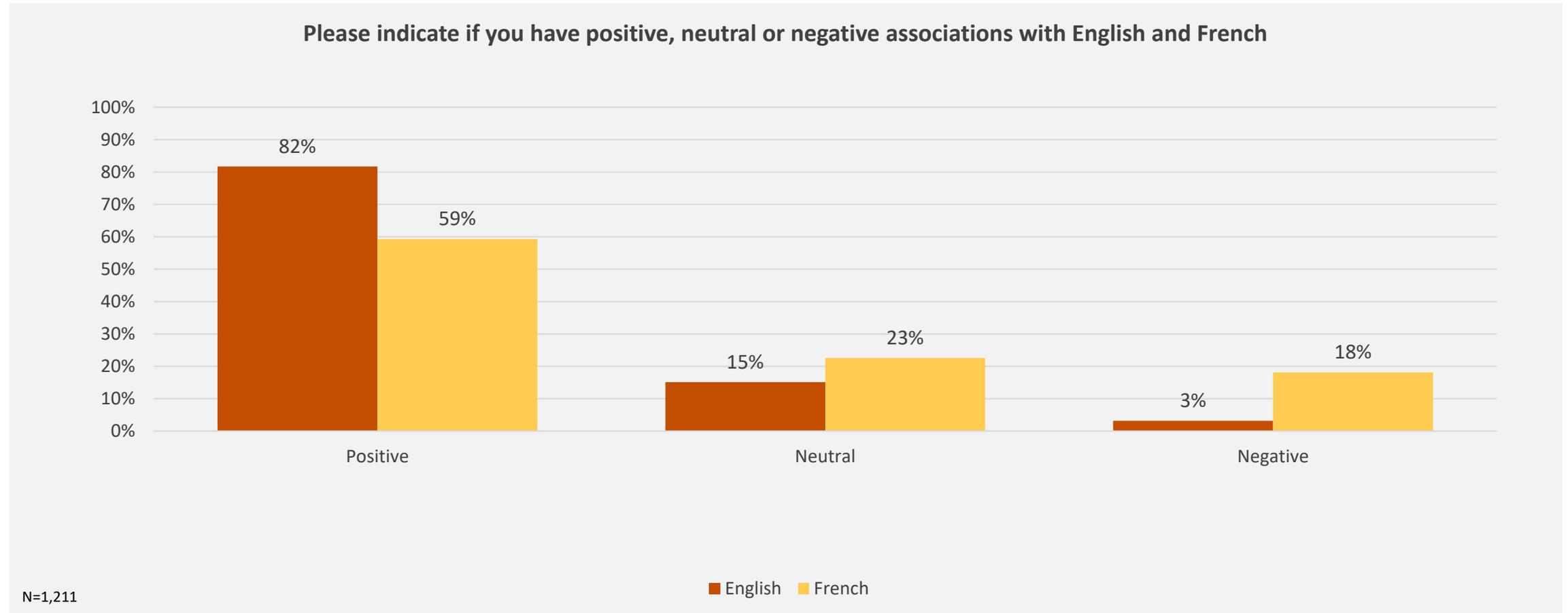
PERCEPTION OF LANGUAGES – KEY FINDINGS

- 40% of respondents believe English is the most important language to learn. Another 40% regard Arabic as most important, while only 10% believe French is most important.
- Combining respondents who say that a language is either the “most important” or “important” to learn, 65% regard as English as important, 62% Arabic and 47% French.
- 82% of respondents have positive associations with English, and 59% with French.
- English is by far the highest-rated compared with Arabic and French when measuring how likely young people are to recommend it to friends, family and colleagues. The key reasons for this are that English is an international language and that it is beneficial for work.
- English and French are considered more or less equally attractive for use in day-to-day and official communication - although English is viewed as more important to learn, French is still widely used.
- The reasons why more Moroccans have learned English in recent years relate to its role as a global language and its importance for obtaining employment, travelling around the world, and accessing knowledge and culture. The COVID-19 pandemic and other international events have also contributed to increased interest in the language.

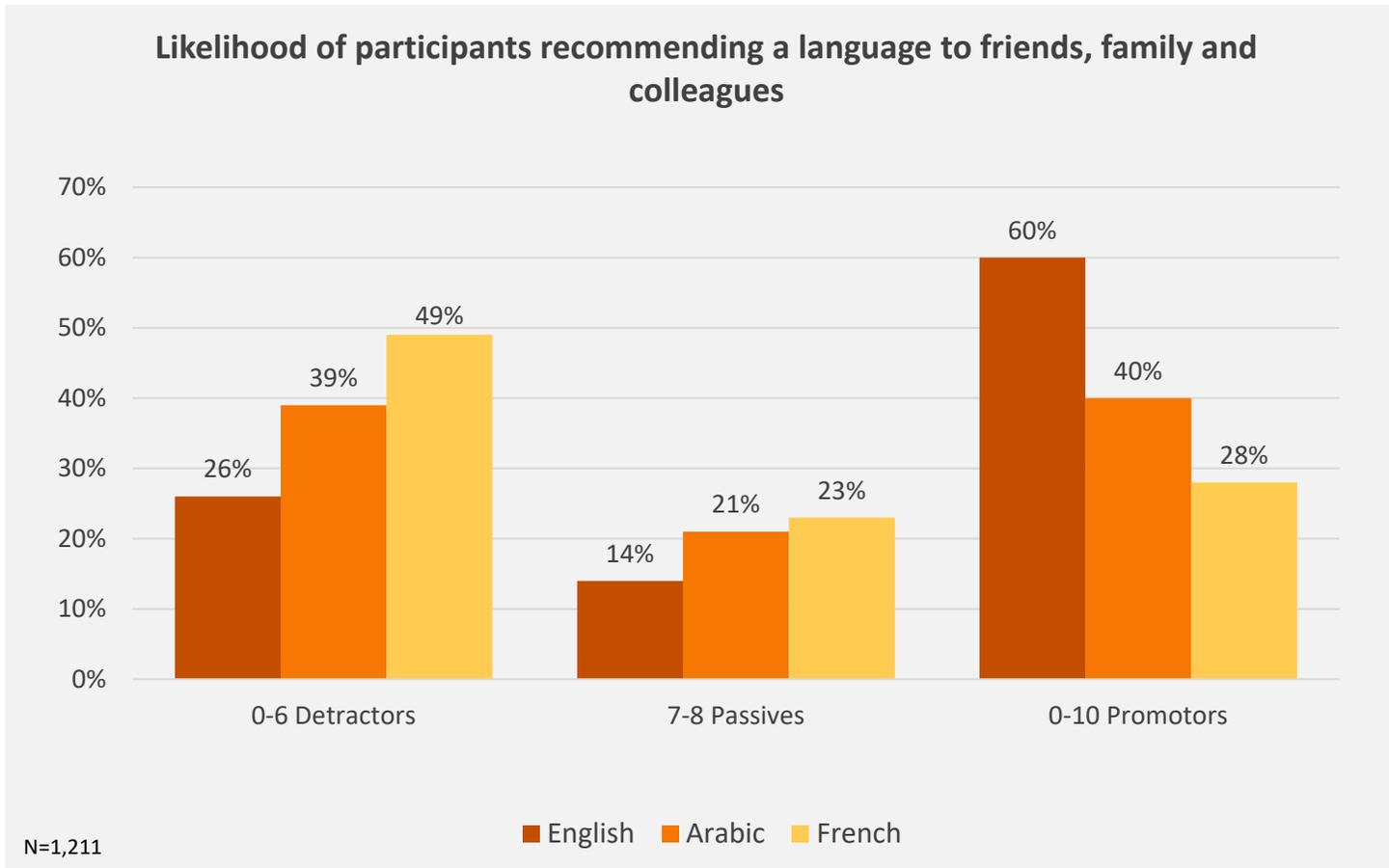
ENGLISH AND ARABIC ARE CONSIDERED THE TWO MOST IMPORTANT LANGUAGES TO LEARN



4 OUT OF 5 HAVE POSITIVE ASSOCIATIONS WITH ENGLISH AND 3 OUT OF 5 WITH FRENCH



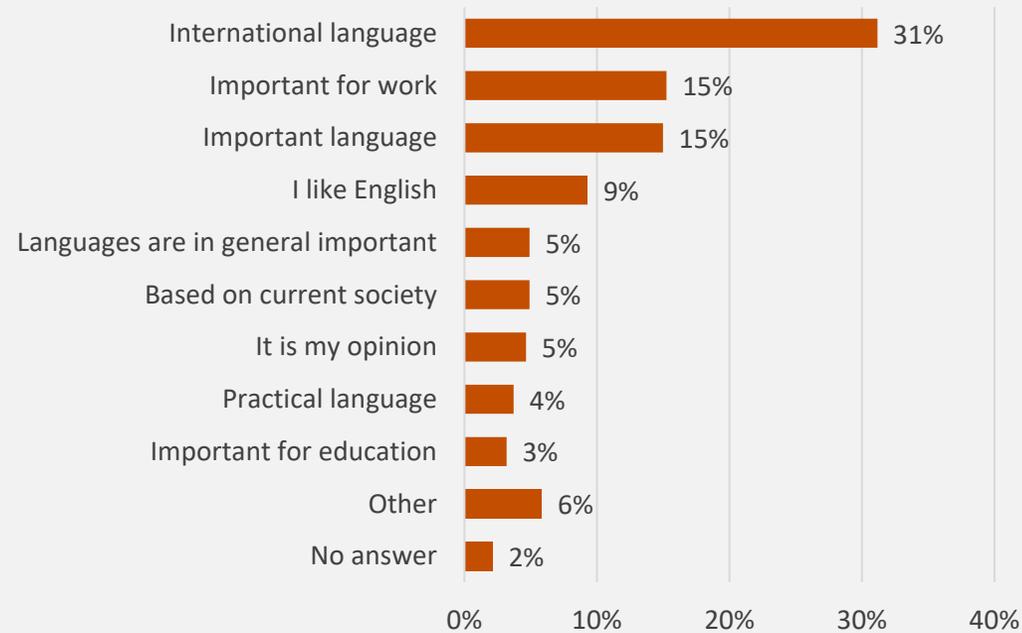
ENGLISH IS THE LANGUAGE WITH THE BEST REPUTATION AMONG THE YOUTH IN MOROCCO



- Net Promoter Score measures the willingness of participants to recommend a language to others. The Net Promoter Score is calculated by subtracting the score of Detractors from the score of Promoters.
- The calculated NPS scores are as follows:
 - **English** (60 minus 26) **34**
 - **Arabic** (40 minus 39) **1**
 - **French** (28 minus 49) **-21**
- The NPS scores clearly indicate that English is the language that youth in Morocco would most recommend to others.

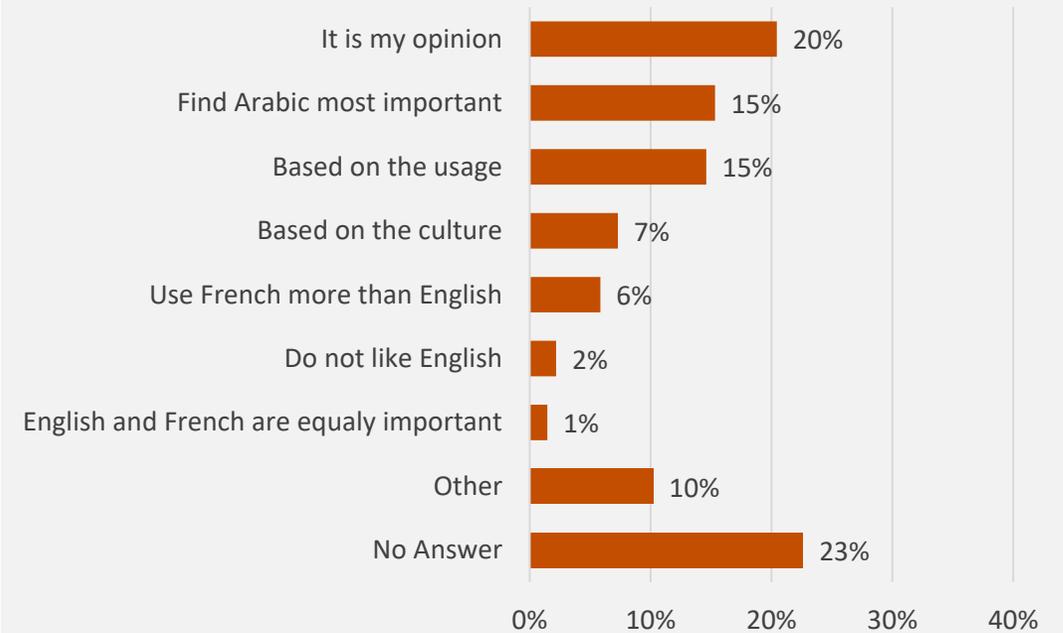
THE MAIN REASONS FOR RECOMMENDING ENGLISH ARE THAT ENGLISH IS AN INTERNATIONAL LANGUAGE THAT IS IMPORTANT FOR WORK

Reasons for recommending English



N=754

Reasons for NOT recommending English

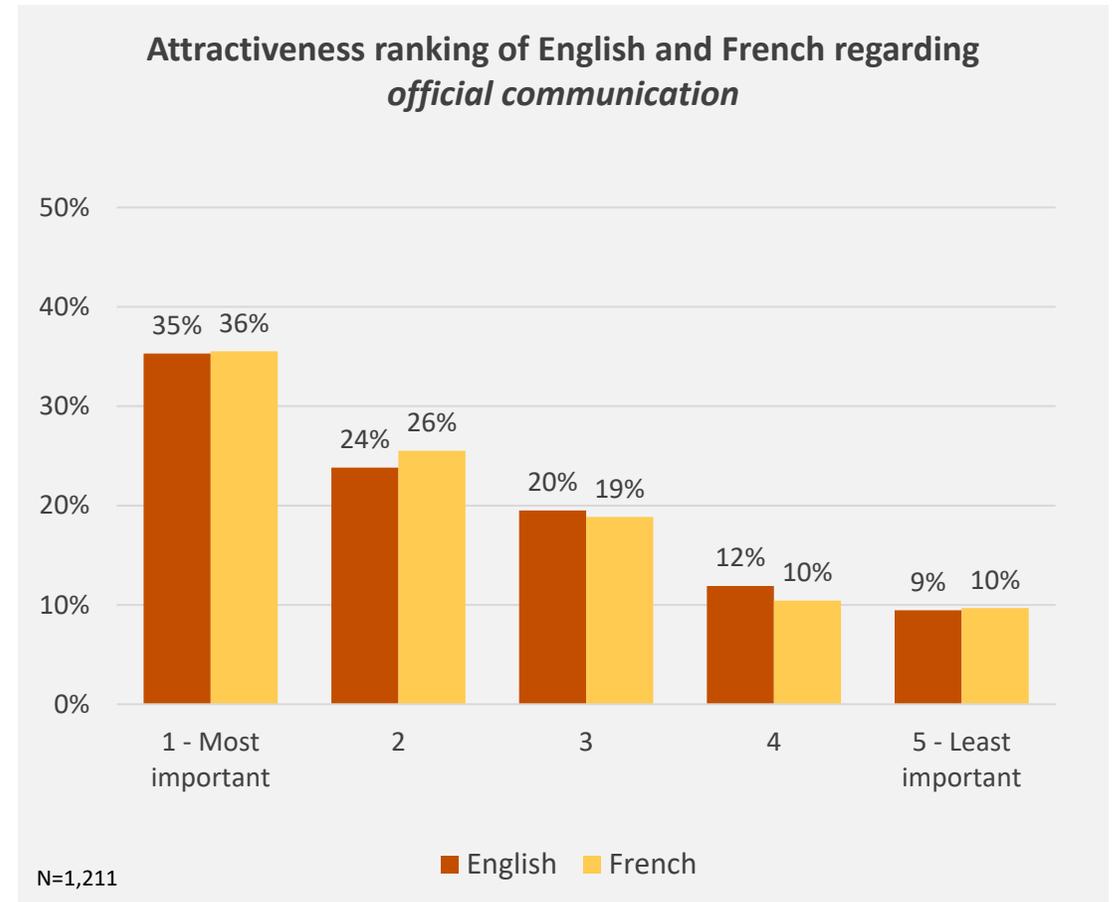
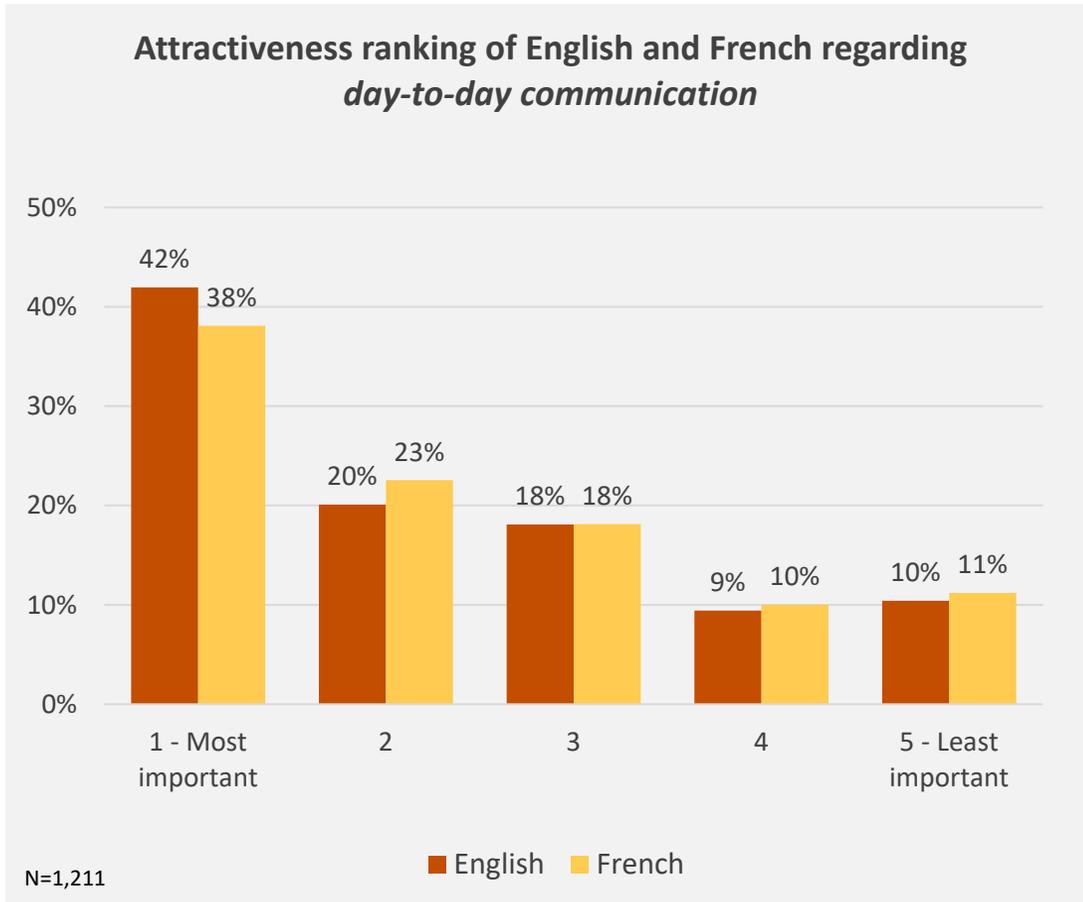


N=137

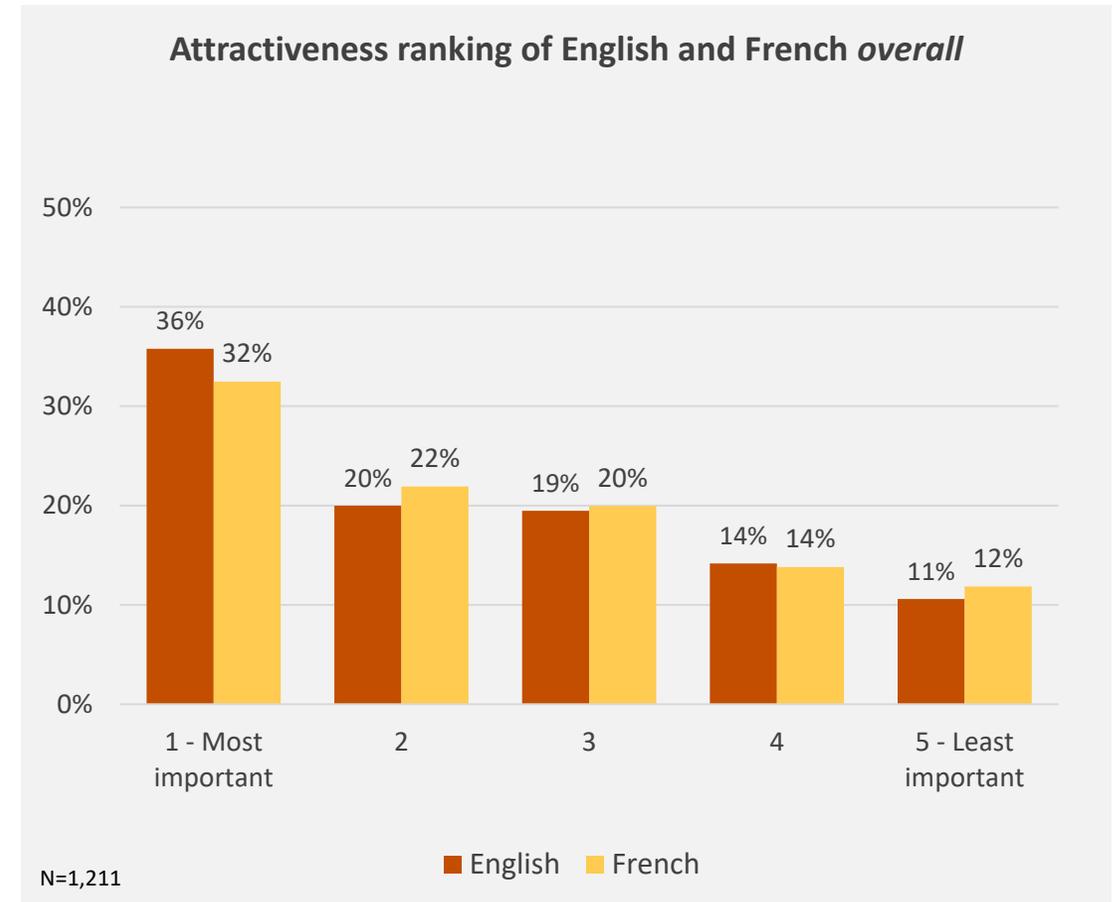
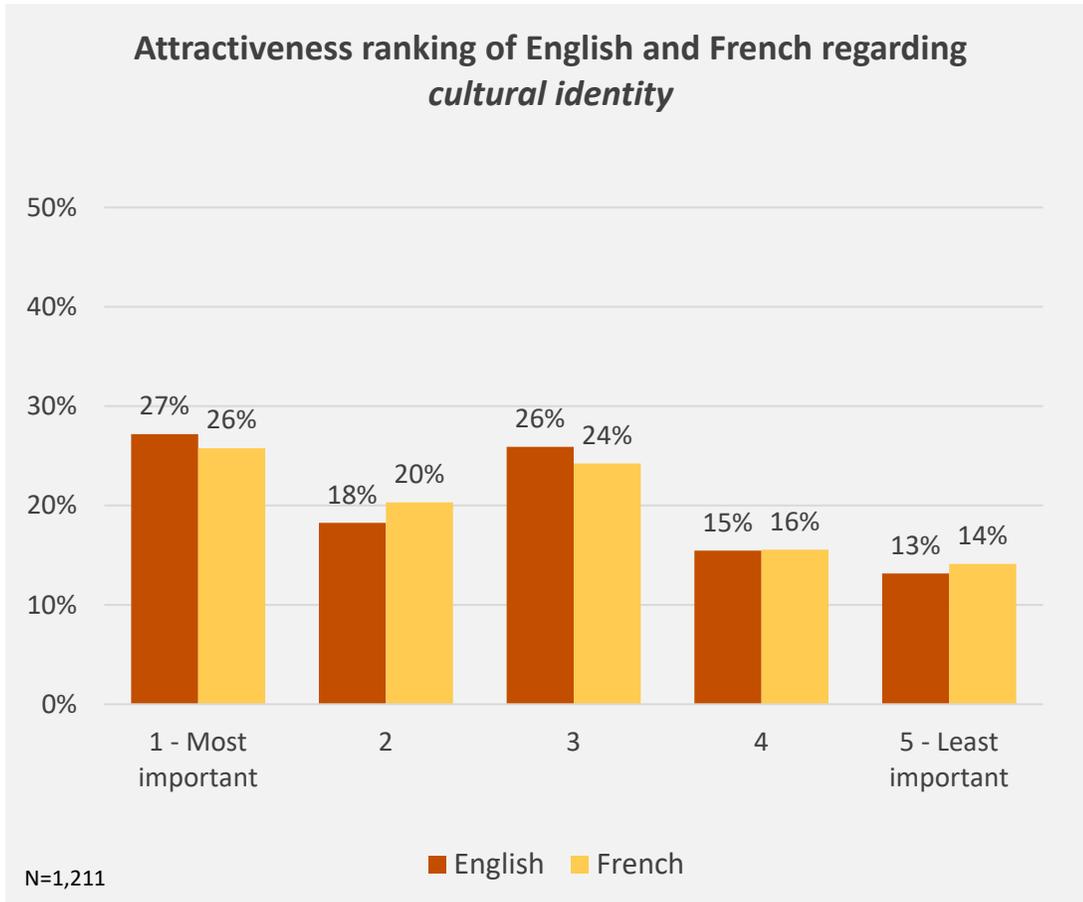
REASONS FOR RECOMMENDING AND NOT RECOMMENDING ENGLISH (SELECTED OPEN ANSWERS OF THE RESPONDENTS)



ENGLISH AND FRENCH ARE CONSIDERED ALMOST EQUALLY ATTRACTIVE WHEN IT COMES TO DAY-TO-DAY AND OFFICIAL COMMUNICATION

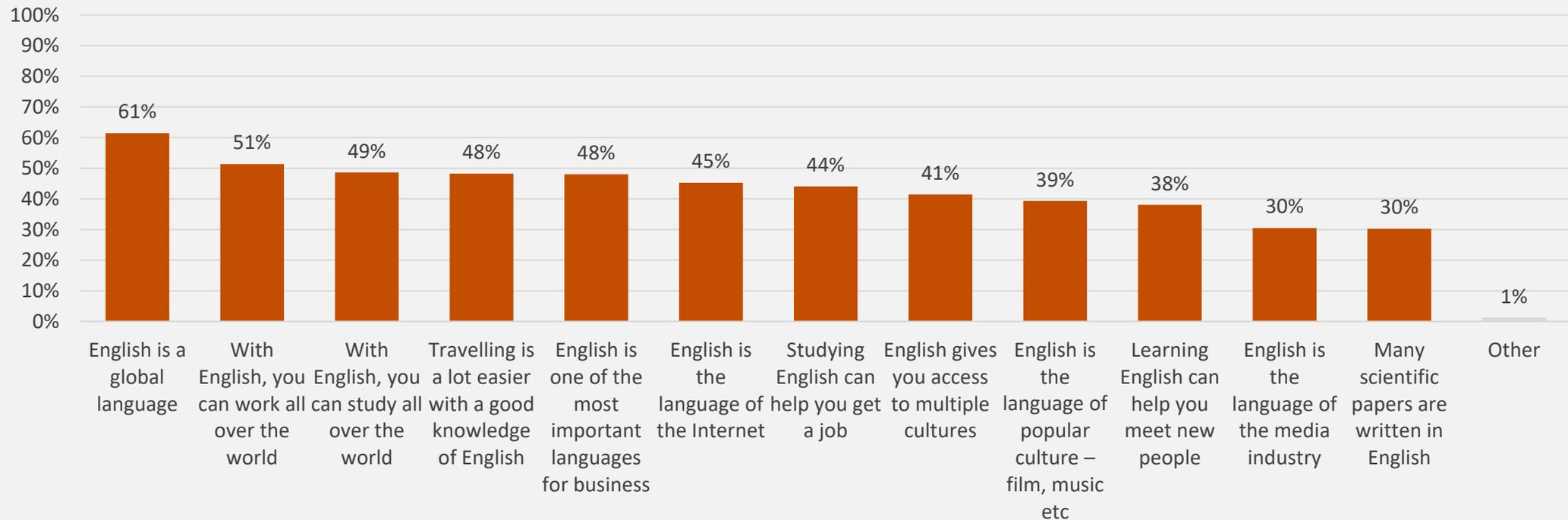


ENGLISH AND FRENCH ARE EQUALLY ATTRACTIVE WHEN IT COMES TO CULTURAL IDENTITY AND OVERALL



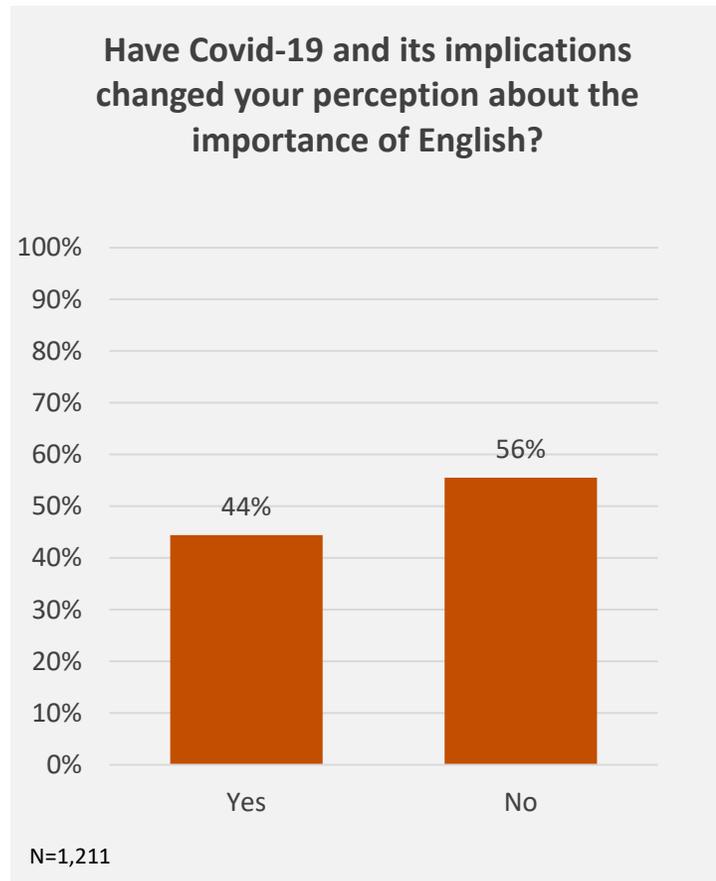
THE INCREASED POPULARITY OF ENGLISH IS DUE TO ITS ROLE AS A GLOBAL LANGUAGE THAT IS IMPORTANT FOR WORK, EDUCATION AND TRAVEL

Why do you think the number of young Moroccans speaking English has been increasing over the years?



N=1,211

COVID-19 MADE PEOPLE MORE AWARE OF THE IMPORTANCE OF ENGLISH (SELECTED OPEN ANSWERS OF THE RESPONDENTS)



"I wanted to take advantage of the quarantine period to develop my communication abilities."

"I started a lot of online courses in that period."

"Because since we were confined, I discovered a lot of super interesting programs in English, and I had set myself to improve my English before the end of the confinement."

"During this pandemic, I learned more about scholarships abroad and I also started studying online through the courses offered by the British Council and other courses."

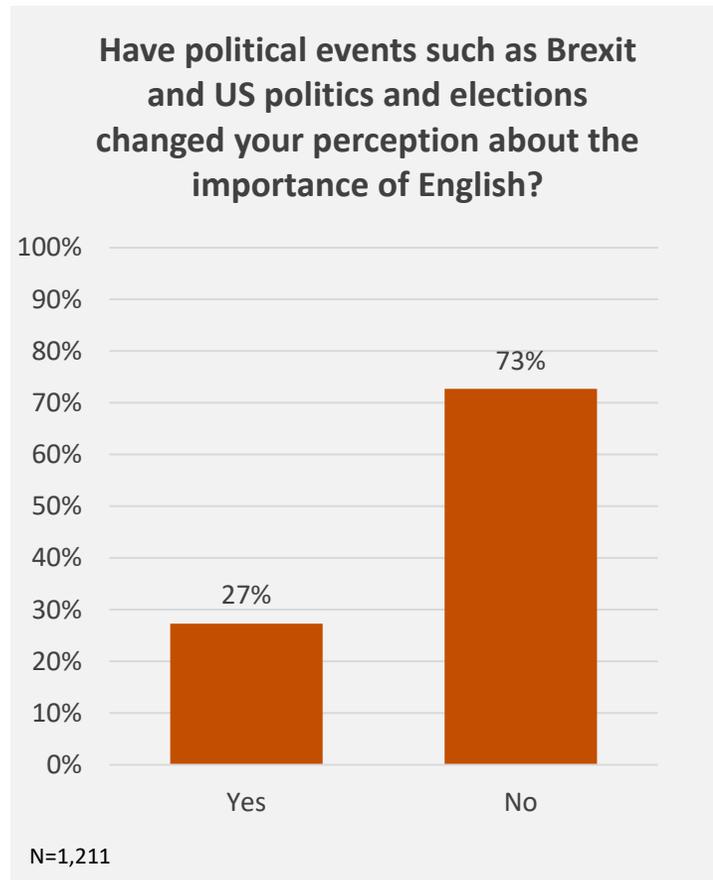
"Thanks to covid 19 several international education platforms have given access to students to participate in courses that are deemed necessary the only thing is that these courses are conducted in English."

"I noticed that there is more interaction in social media in English than in French."

"We need it for connection with the rest of the world."

"Being difficult to find a job I thought about working on the internet, I discovered that to make money and earn a living online you need a good English skills."

POLITICAL EVENTS ALSO MADE PEOPLE MORE AWARE OF THE IMPORTANCE OF ENGLISH (SELECTED OPEN ANSWERS OF THE RESPONDENTS)



"Because the follow-up of these events in a close and neutral way is generally done through the English (American) media."

"Because after the American elections, I became aware of the dominance of an American economy in the world and the extent of Britain's power and influence on a European economy."

"By my curious nature, I like to be informed through good sources, so I followed channels like NBC and CBS which once again showed the importance of the English language."

"The English language is what the world is all about."

"Because after the American elections, I became aware of the dominance of an American economy in the world and the extent of Britain's power and influence on a European economy."

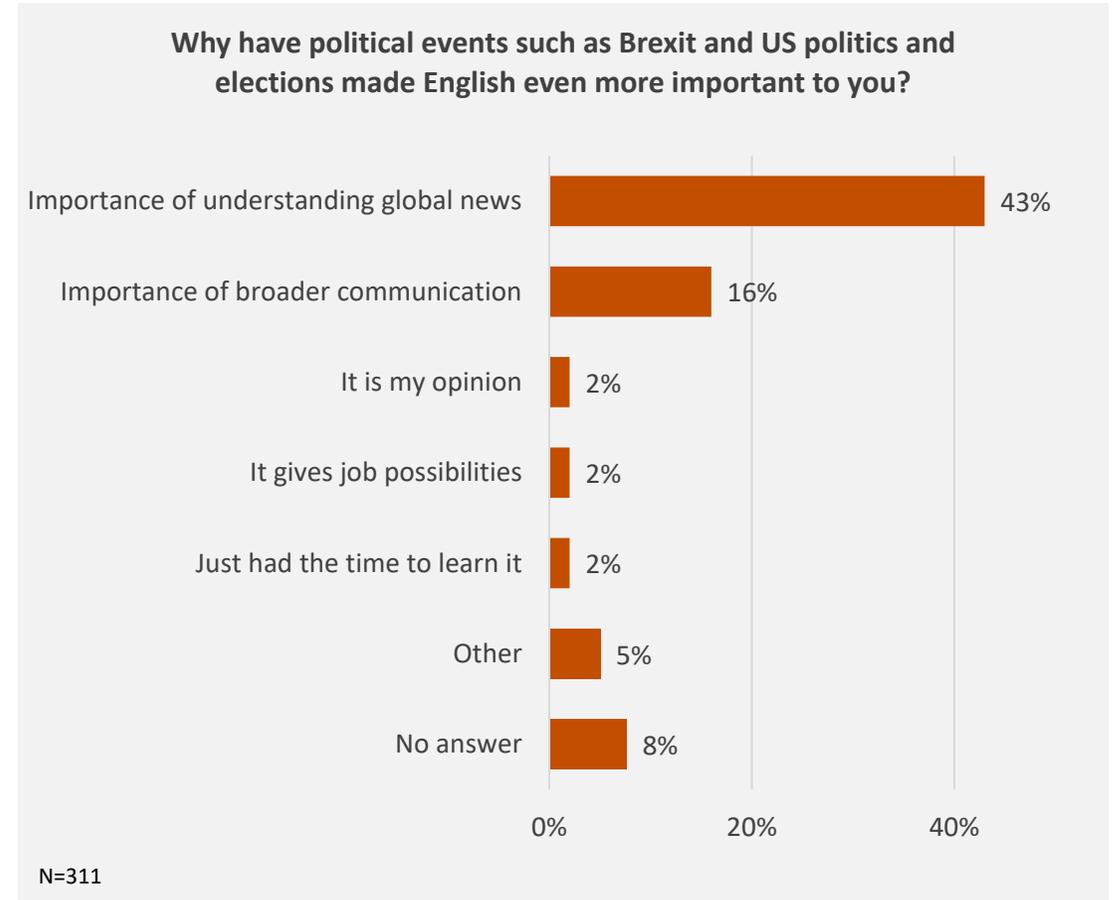
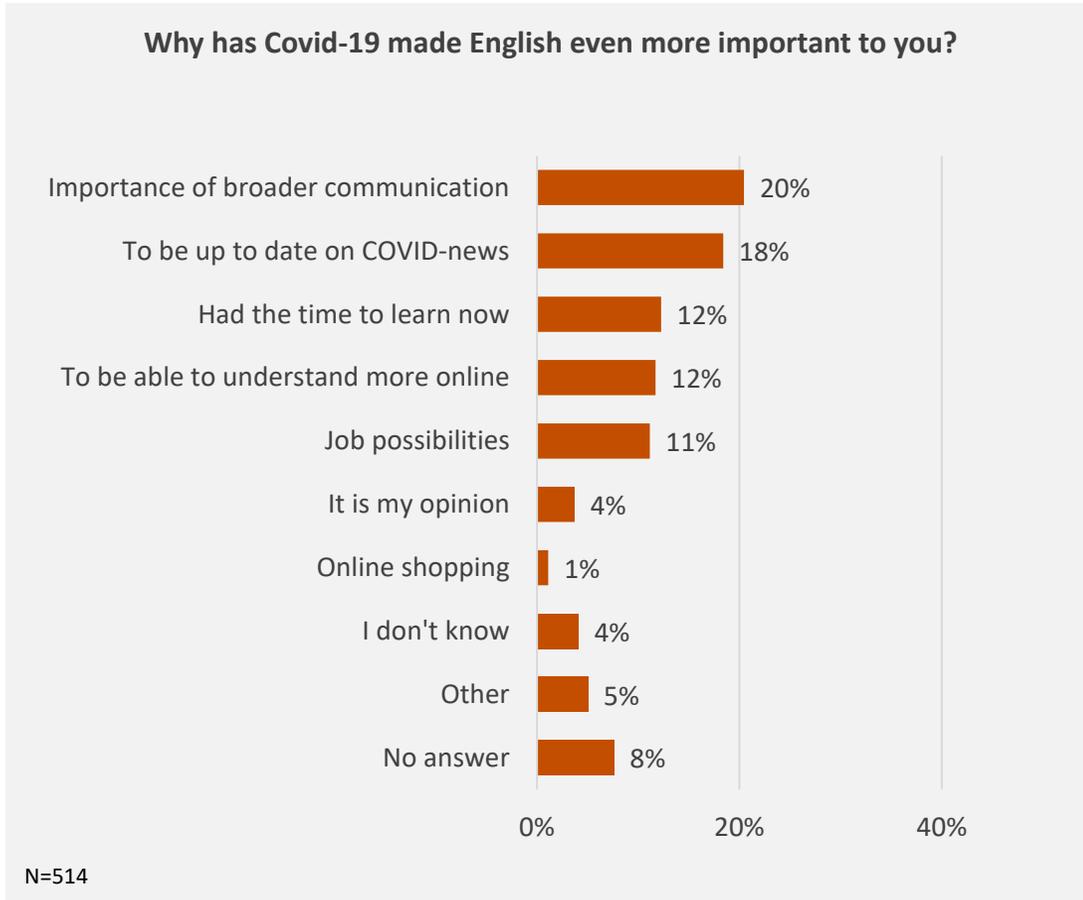
"Because I understood the role of the English language."

"Because sometimes I can't understand what they say, so it made English more important to me."

"Because I needed to follow the news."

"Elections in general attract the attention of many people so if it is American elections, people will go to learn English to understand it."

THE MOROCCAN YOUTH REALISE THE IMPORTANCE OF ENGLISH FOR KEEPING UP WITH GLOBAL NEWS





4

CURRENT LANGUAGE USAGE



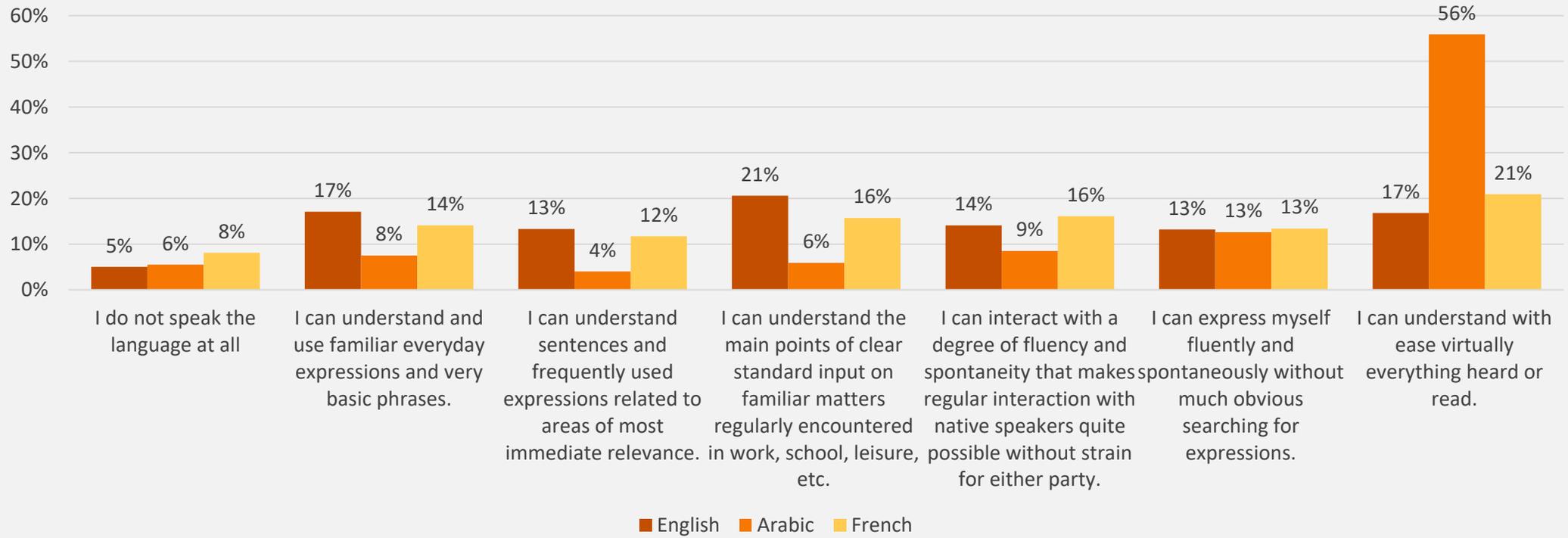
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CURRENT LANGUAGE USE – KEY FINDINGS

- 69% of Moroccan youth speak and understand Arabic with high proficiency. 34% speak and understand French with high proficiency, and 30% speak and understand English with high proficiency.
- Those with high English proficiency are spread across Morocco, with 33% in Casablanca, 15% in Rabat and 13% in Marrakesh, followed by the other cities. They tend to have a higher education level and higher income than those with lower English proficiency. They are also slightly younger, and slightly more likely to be female than male.
- The three main platforms where people learned English are school (37%), movies and series (25%) and the internet (17%). 7% learned through a language app and 6% through an English language training institute.
- Only in 10% of schools was English the main language used. Arabic and French are the dominant languages in schools.
- When asked what platforms they would prefer to learn English on, the internet (61%), language apps (45%) and private schools (45%) were the preferred platforms.

ARABIC IS THE LANGUAGE MOST COMMONLY SPOKEN WITH HIGH PROFICIENCY. ENGLISH AND FRENCH ARE CLOSE TO EACH OTHER IN TERMS OF THE LEVEL OF PROFICIENCY

Which of the following three languages do you speak and at what level?



N=1,211

SEGMENT 1: THOSE WITH HIGH PROFICIENCY IN ENGLISH TEND TO BE YOUNGER, BETTER EDUCATED, HAVE HIGHER INCOMES AND ARE MORE LIKELY TO BE FEMALE THAN THOSE WITH LOWER LEVELS OF PROFICIENCY

SEGMENT 1

SEGMENT SIZE:

30 %

HIGH PROFICIENCY

DEMOGRAPHICAL IDENTIFIERS



33% Casablanca, 15% Rabat, 13% Marrakech



52% are females



51% 19-22 years old, 41% - 23-25 years old



Household income: 25.328 DH



Personal income: 9.481 DH



59 % Students, 15% Employed

LANGUAGE SPECIFIC CHARACTERISTICS

- Education level:
Bachelor – 28%,
General Secondary – 20%
- 78% are PROMOTORS on NPS score

SEGMENT 2: MEDIUM PROFICIENCY IN ENGLISH

SEGMENT 2

SEGMENT SIZE:

48 %

MEDIUM PROFICIENCY

DEMOGRAPHICAL IDENTIFIERS



29% Casablanca, 16% Marrakech, 15% Agadir



50% are females



47% 19-22 years old, 43% - 23-25 years old



Household income: 13.921 DH



Personal income: 5.709 DH



61 % Students, 13% Employed

LANGUAGE SPECIFIC CHARACTERISTICS

- Education level:
 - General Secondary – 23%
 - Bachelor– 20%
- 46 % are PROMOTORS on NPS score

SEGMENT 3: THOSE WITH LOW PROFICIENCY IN ENGLISH ARE MORE LIKELY TO BE MALE, LESS EDUCATED AND HAVE LOWER INCOMES

SEGMENT 3

SEGMENT SIZE:

22 %

LOW PROFICIENCY

DEMOGRAPHICAL IDENTIFIERS



24% Casablanca, 15% Agadir, 12% Tangiers



52% are males



45% 19-22 years old, 36% - 23-25 years old



Household income: 17.927 DH



Personal income: 5.201 DH

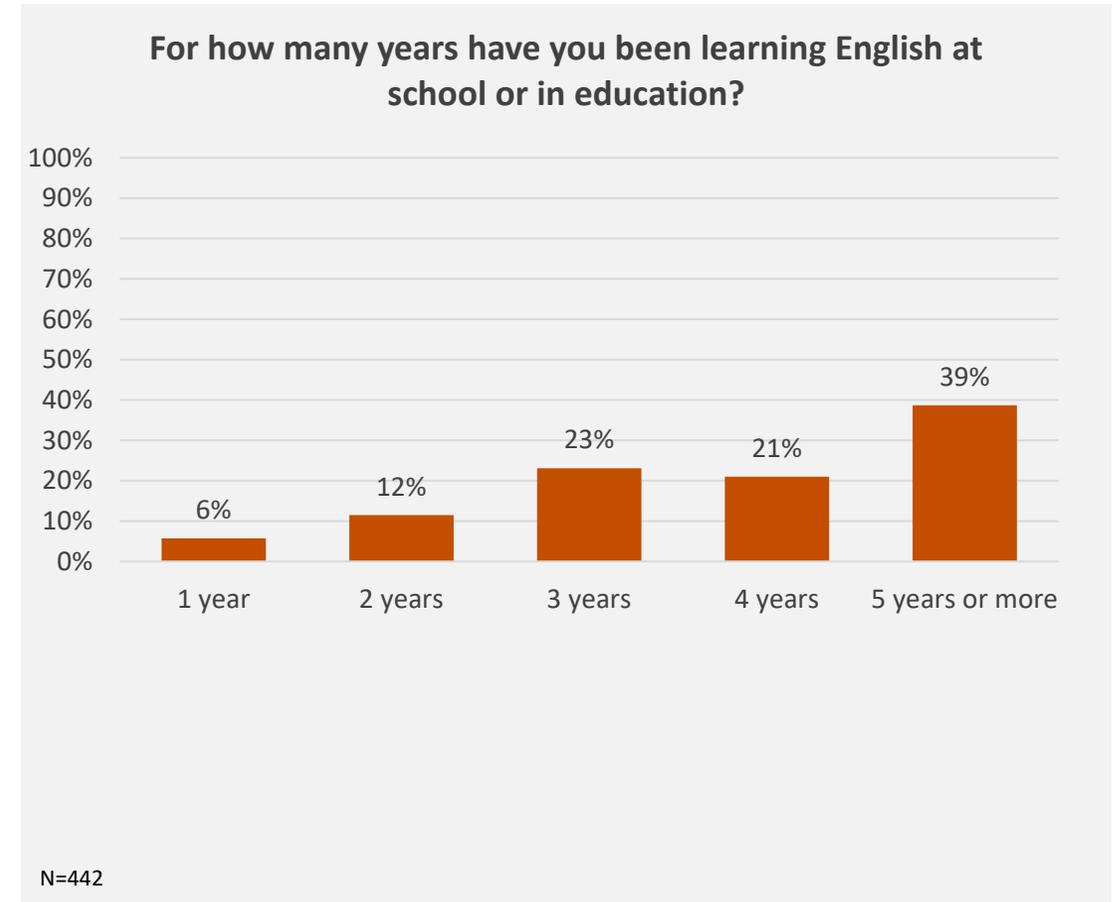
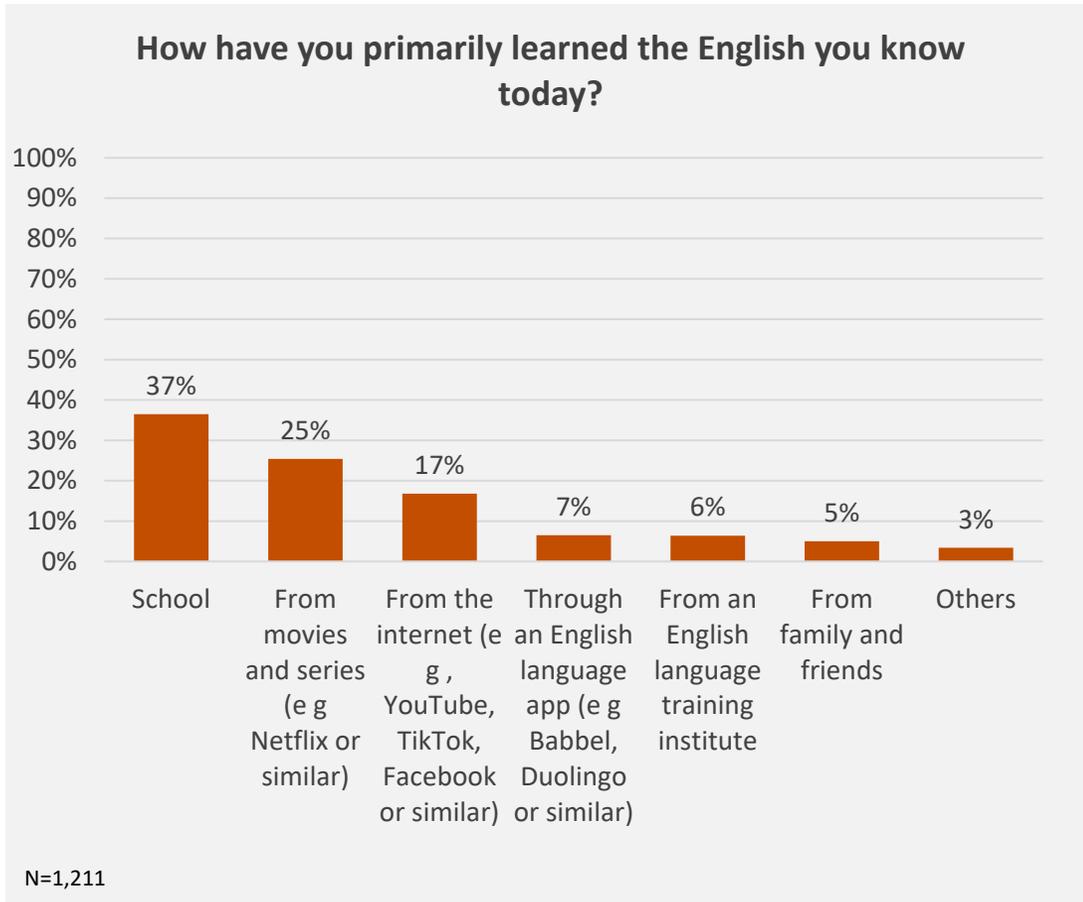


61 % Students, 13% Unemployed, looking for work

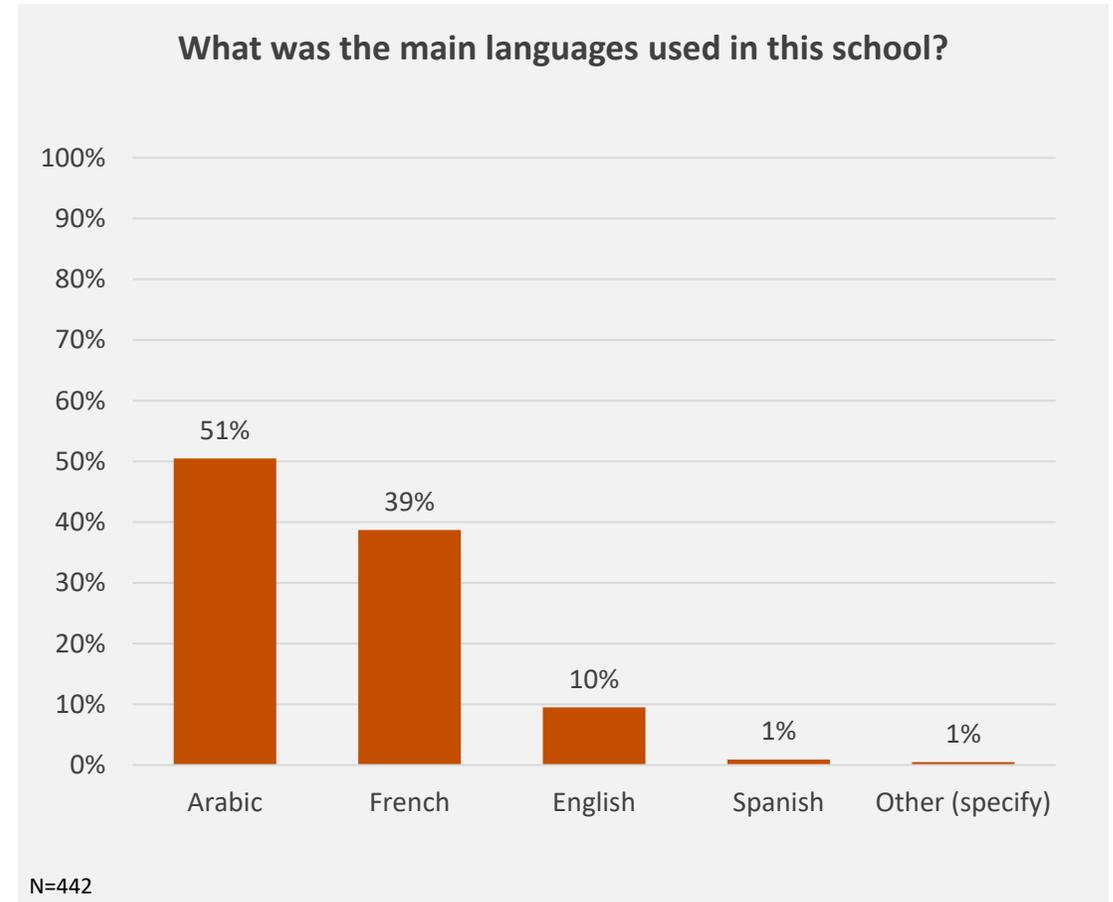
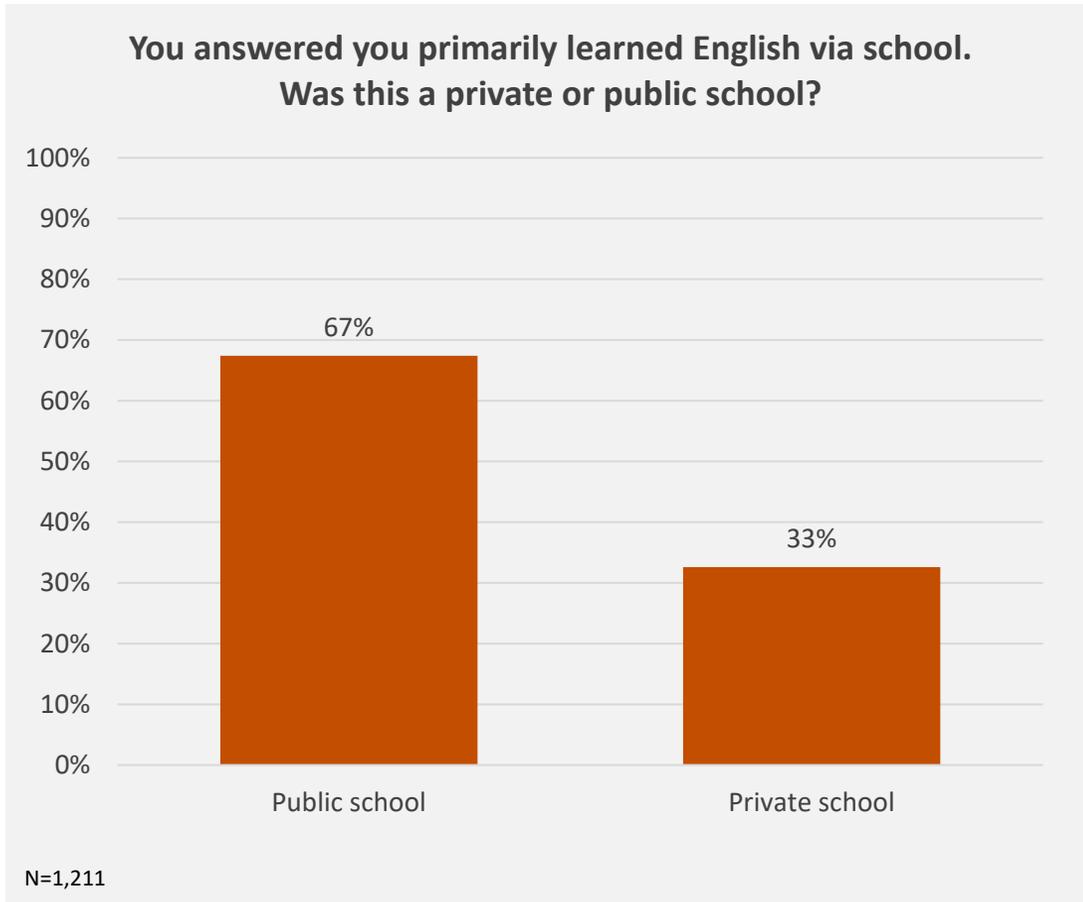
LANGUAGE SPECIFIC CHARACTERISTICS

- Education level:
 - General Secondary – 39%
 - General University Diploma – 14%
- 46 % are PROMOTORS on NPS score

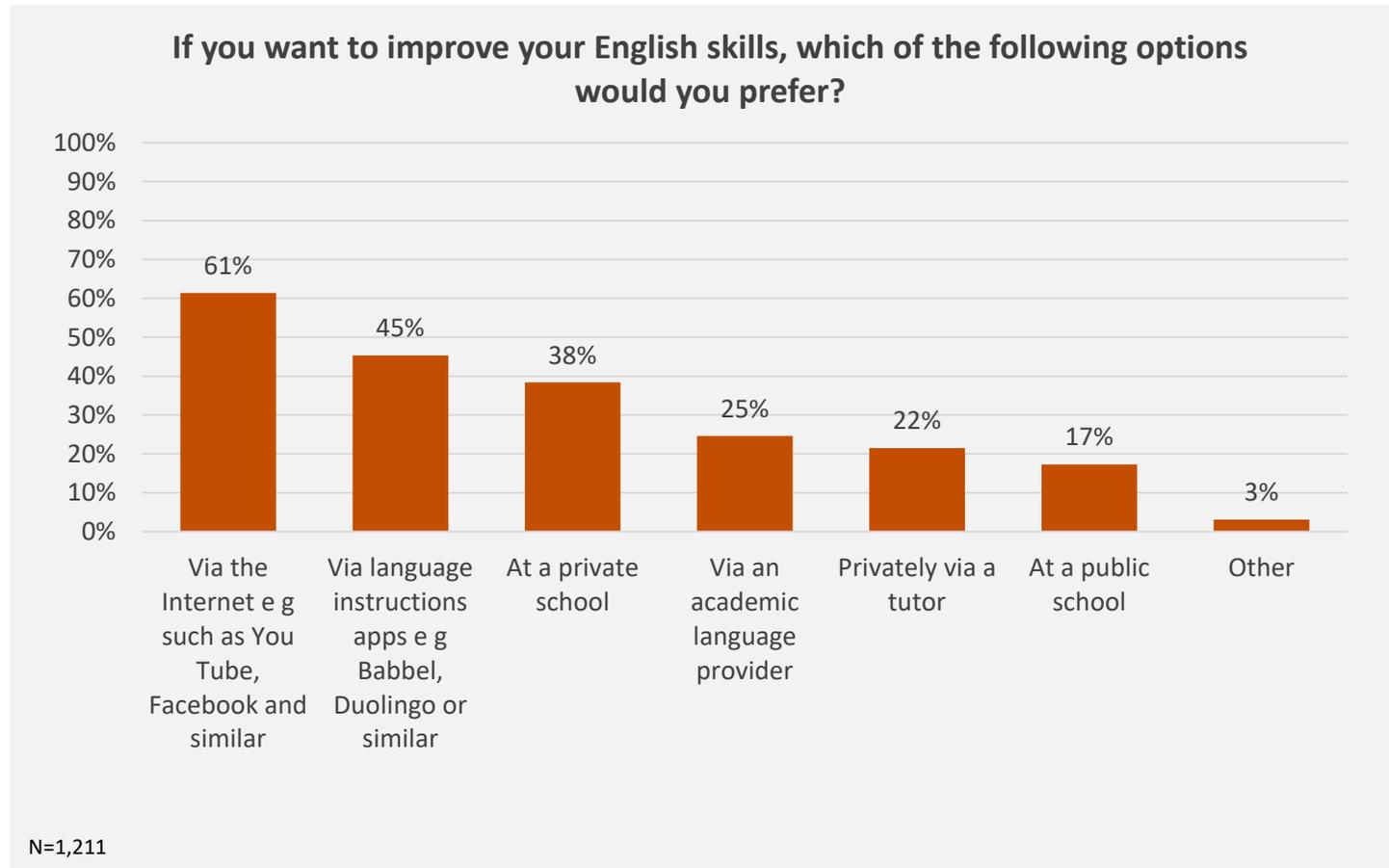
SCHOOL IS THE MAIN VENUE FOR LEARNING ENGLISH, BUT MOVIES, TV SERIES AND THE INTERNET ARE ALSO IMPORTANT. A MINORITY ALSO USE APPS AND LANGUAGE TRAINING INSTITUTES TO LEARN ENGLISH



THE MAJORITY OF RESPONDENTS WENT TO PUBLIC SCHOOL, AND THE DOMINANT LANGUAGES IN SCHOOLS ARE ARABIC AND FRENCH



YOUNG PEOPLE WOULD PREFER TO LEARN ENGLISH VIA THE INTERNET, LANGUAGE INSTRUCTION APPS AND AT PRIVATE SCHOOLS



- Many respondents learn English by being active on social media platforms. This is not only by following celebrities who speak English, but also by meeting other people online and discussing different topics of interest.
- Some mention having met people online during the COVID-19 pandemic as the reason for making an effort to master English at a better level.
- Movies, series and online gaming are also of great significance for learning English.
- During the pandemic, young people have used the opportunity of having more spare time to access learning platforms and take courses, including for improving English skills.



5

ENGLISH IN THE DAILY LIFE OF MOROCCANS



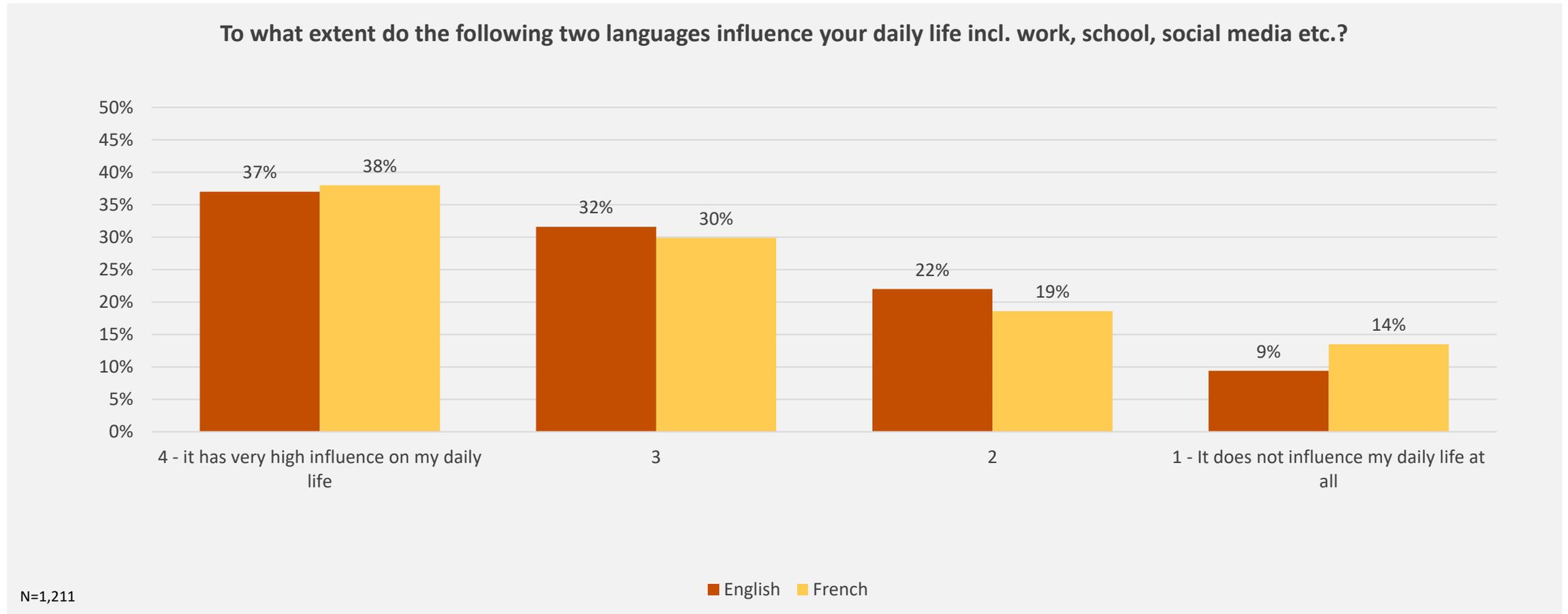
Commissioned by the British Council and conducted independently by Omnibus Marketing Research & Consultancies

ENGLISH IN DAILY LIFE – KEY FINDINGS

- English and French have an equally strong influence on the daily life of Moroccan youth.
- Young Moroccans encounter English in their daily life via many different platforms, but the two most significant are via the internet and via movies, music and series. These are also the two platforms where the Moroccan youth most actively seek to engage with English.
- The internet sites and social media platforms most often used in English are Facebook, Instagram and YouTube, followed by educational platforms.
- Moroccan youth mainly watch movies and series in English on Netflix, with MBC and YouTube used to a much lesser extent for this purpose.

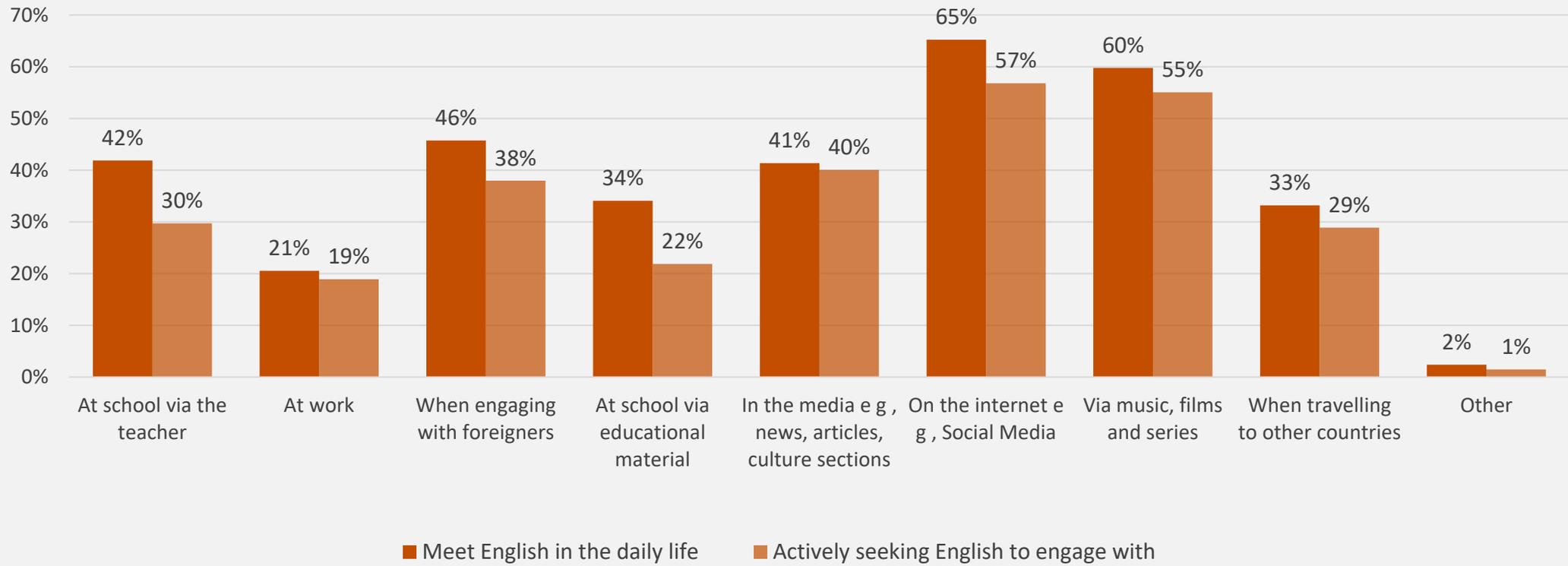


ENGLISH AND FRENCH HAVE AN EQUALLY STRONG INFLUENCE ON PEOPLE'S DAILY LIFE



MOST ARE EXPOSED TO ENGLISH VIA THE INTERNET AND THROUGH MUSIC, FILMS AND SERIES. THESE ARE ALSO THE PLATFORMS WHERE PEOPLE ARE MOST ACTIVELY SEEKING TO ENGAGE WITH ENGLISH

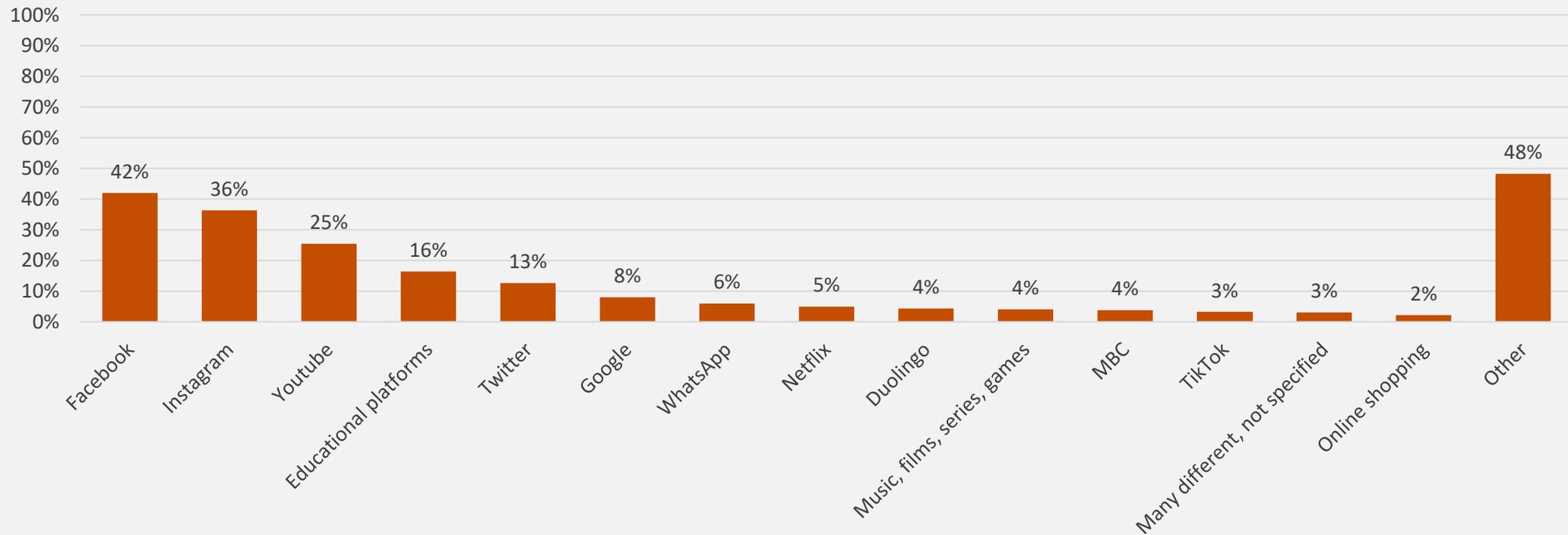
Where do you meet and engage with English in your daily life?



N=1,211

THE MOST OFTEN-USED INTERNET SITES AND SOCIAL MEDIA PLATFORMS IN RELATION TO ENGLISH ARE FACEBOOK, INSTAGRAM AND YOUTUBE. ONLINE EDUCATIONAL PLATFORMS ARE ALSO USED.

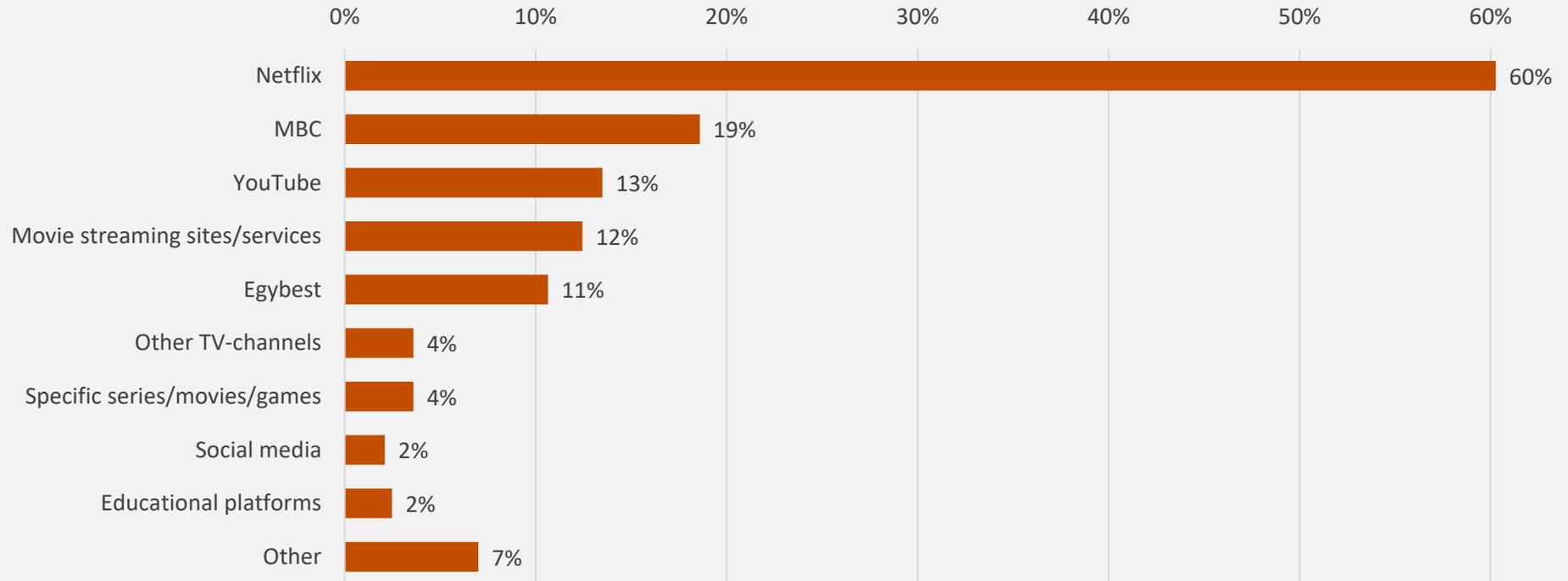
What internet sites and social media platforms do you often use in English?



N=442

THE LEADING MEDIA CHANNELS AND PLATFORMS USED IN ENGLISH ARE NETFLIX, MBC AND YOUTUBE

What channels and platforms do you often use for Movies and series in English?



N=929



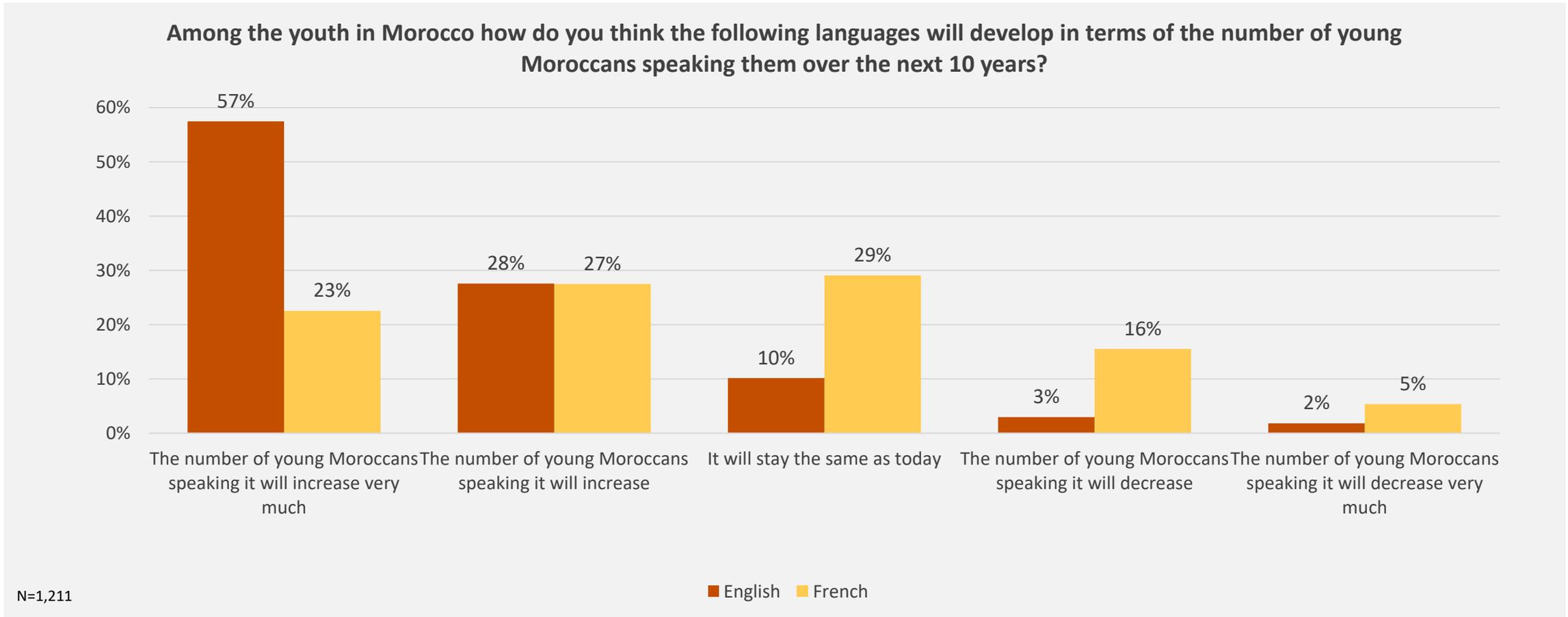
6

FUTURE LANGUAGE PREFERENCES

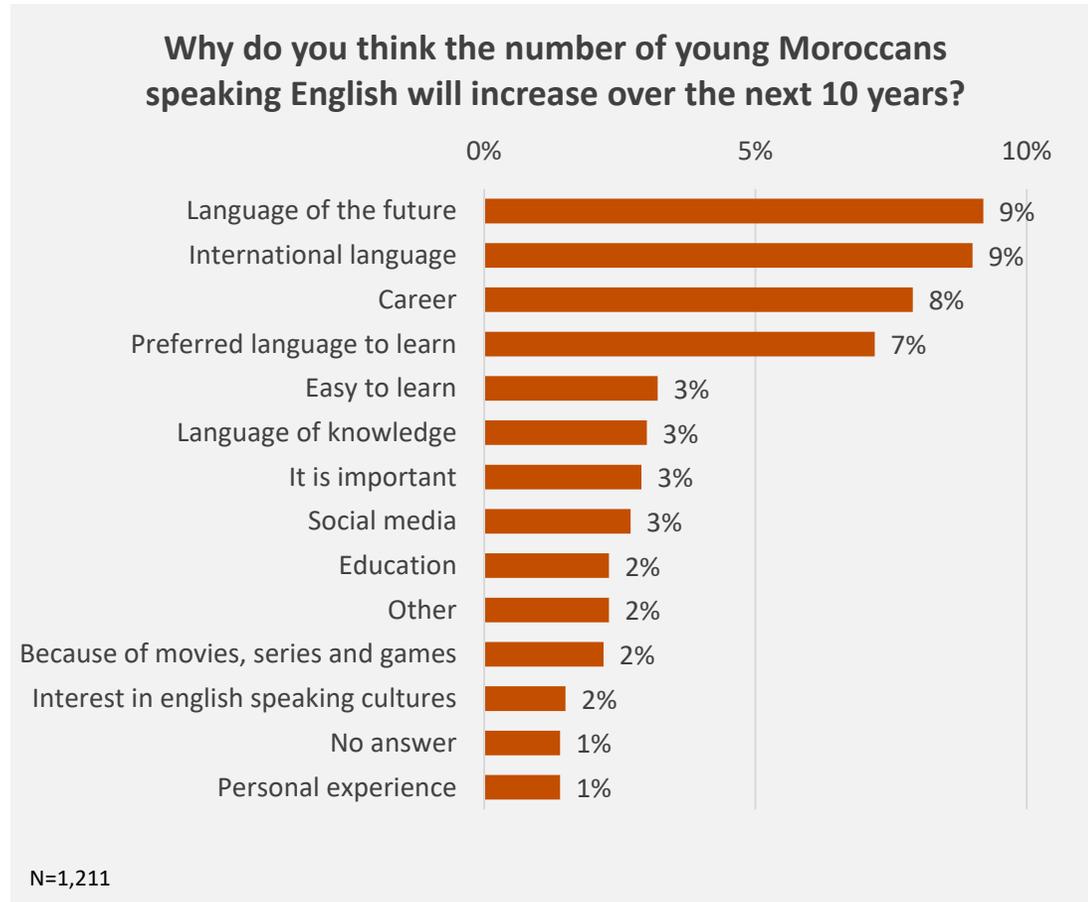
FUTURE LANGUAGE PREFERENCES – KEY FINDINGS

- 85% of respondents expect the number of young Moroccans speaking English to increase in the next ten years, with 57% expecting the number to increase greatly.
- While 50% expect the use of French also to increase, only 23% expect it to increase greatly, and 21% expect it to decrease.
- The main reasons Moroccan young people expect English to become more widely spoken are that it is seen as the language of the future, as an international language, and as positive for one's career.
- There is strong agreement among young Moroccans that English should become the primary second language in the country. 74% agree that Morocco should adopt English instead of French as its primary second language.
- Such a move, respondents believe, will enhance tourism to Morocco, enhance the country's status as a business hub and gateway to Africa, and strengthen its profile as a research and innovation hub. From a personal point of view, moreover, respondents believe a stronger focus on English will enable them to access high-quality educational opportunities, obtain better jobs both locally and internationally, and earn higher salaries.
- More than two-thirds believe English will replace French as the primary foreign language within five years.

85% EXPECT THE NUMBER OF MOROCCANS SPEAKING ENGLISH TO INCREASE THE NEXT 10 YEARS. 50% EXPECT THE NUMBER SPEAKING FRENCH TO INCREASE, AND 21% EXPECT IT TO DECREASE



THE KEY REASONS FOR EXPECTING MORE MOROCCANS TO SPEAK ENGLISH THAT IT IS PERCEIVED AS THE LANGUAGE OF THE FUTURE, AS AN INTERNATIONAL LANGUAGE, AND AS BENEFICIAL FOR ONE'S CAREER



"Because the Moroccan youth aspires a lot to learn languages in order to develop their minds and prosper and speak with people from any country and does not want to remain backward."

"Because most of the youth aspire to a beautiful future, and if you want to work, then most fields need the English language as a basic thing."

"The English language is very important for the integration of young people into the labor market, because the majority of companies require a level of language, mainly English, when recruiting."

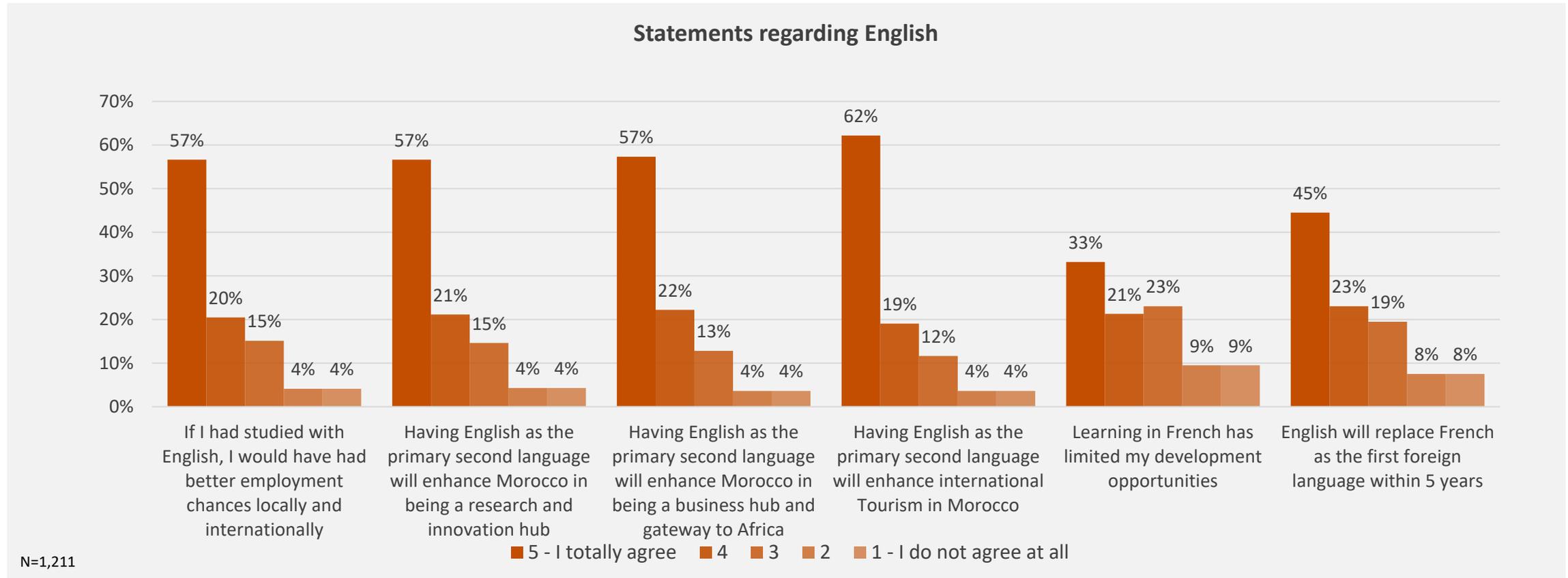
"Everyone is turning to the English language because of its dominance on the Internet."

"The next 10 years will require more English speakers."

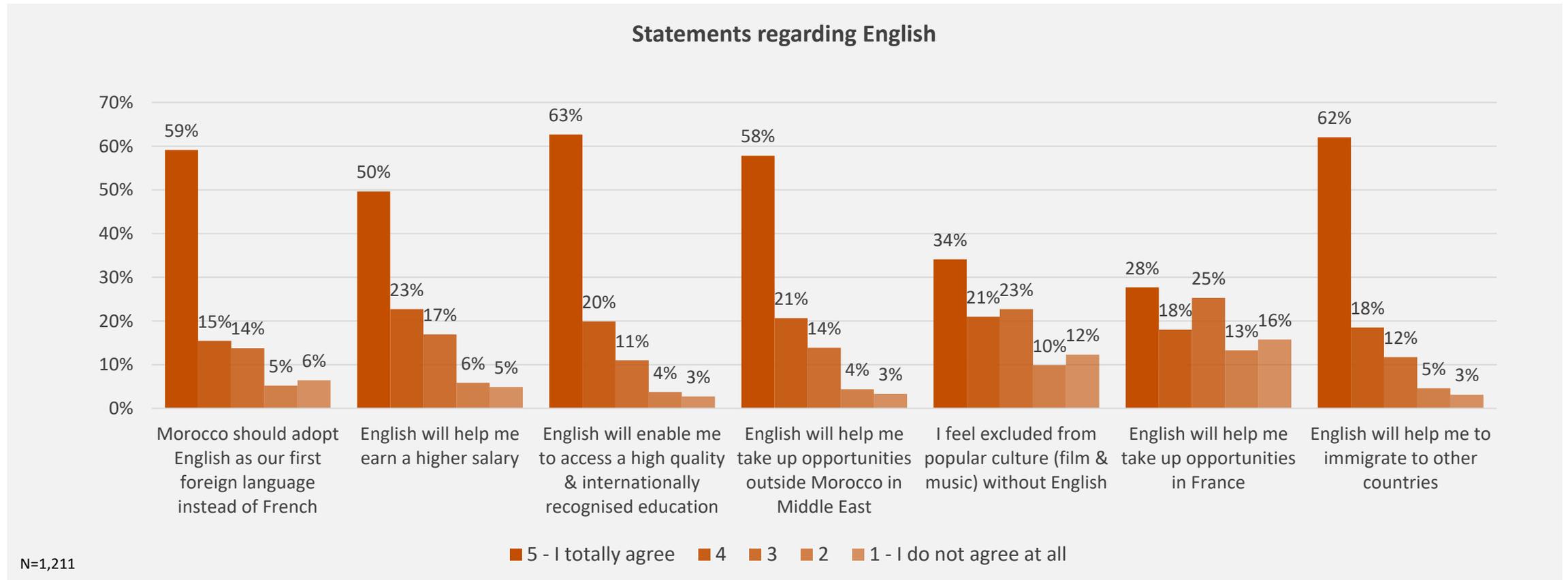
"Because English is the language of the future."

"English is an international language, and it is noticed here in Morocco people started learning English, especially the young people."

REPLACING FRENCH WITH ENGLISH AS MOROCCO’S PRIMARY SECOND LANGUAGE IS SEEN AS OFFERING GREAT BENEFITS BOTH TO THE COUNTRY AS A WHOLE AND TO YOUNG PEOPLE THEMSELVES. RESPONDENTS BELIEVE THE COUNTRY WILL BENEFIT ECONOMICALLY AND WITH REGARD TO RESEARCH AND INNOVATION, WHILE THEY THEMSELVES WILL BENEFIT WITH REGARD TO EDUCATION AND WORK



ENGLISH IS ALSO SEEN AS BENEFICIAL IN TERMS OF HELPING YOUNG PEOPLE TO TAKE UP EDUCATION AND CAREER OPPORTUNITIES ABROAD. THERE IS STRONG AGREEMENT THAT IT SHOULD BECOME THE COUNTRY'S MAIN SECOND LANGUAGE





7

METHODOLOGY AND SAMPLE PROFILE



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RESEARCH METHODOLOGY

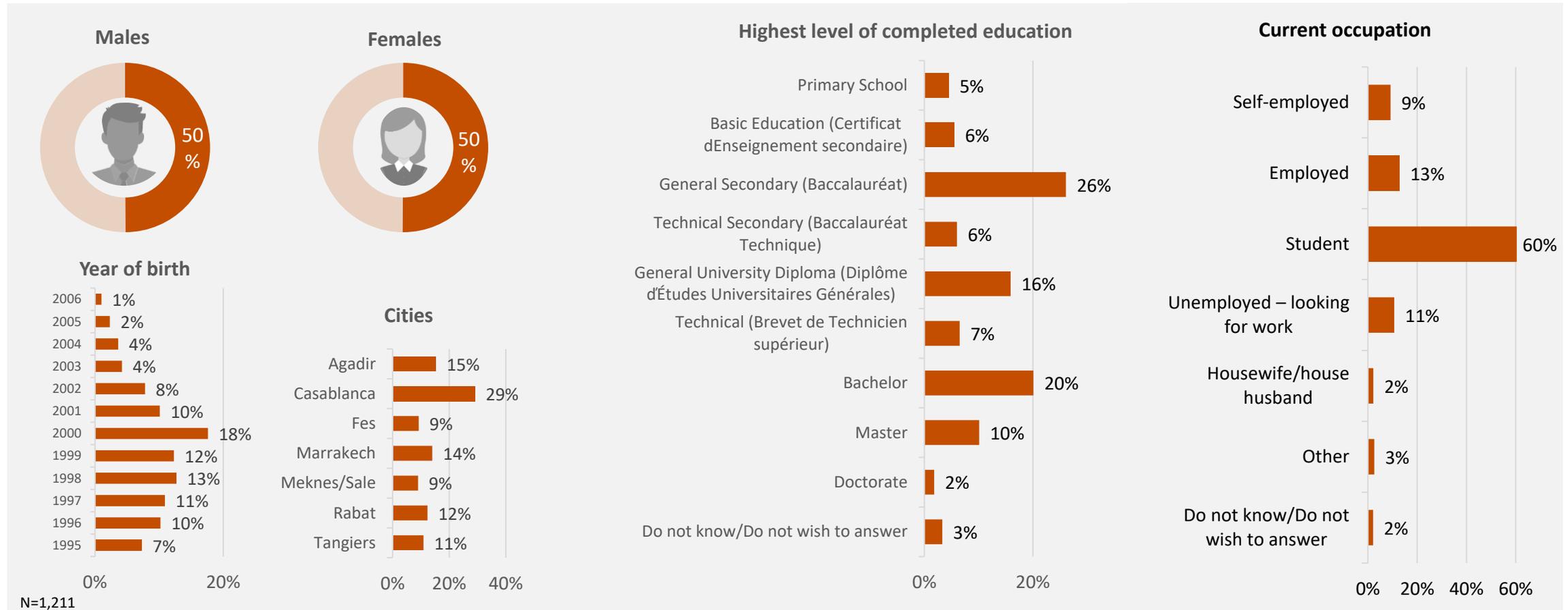
On behalf of the British Council, Omnibus has conducted a quantitative research project to provide an evaluation and insights into the shift towards English among Moroccan youth aged 15 to 25.

Using a 15-minute questionnaire, Omnibus interviewed 1,211 persons via online panels. Interviews were conducted between 16th and 29th March 2021.

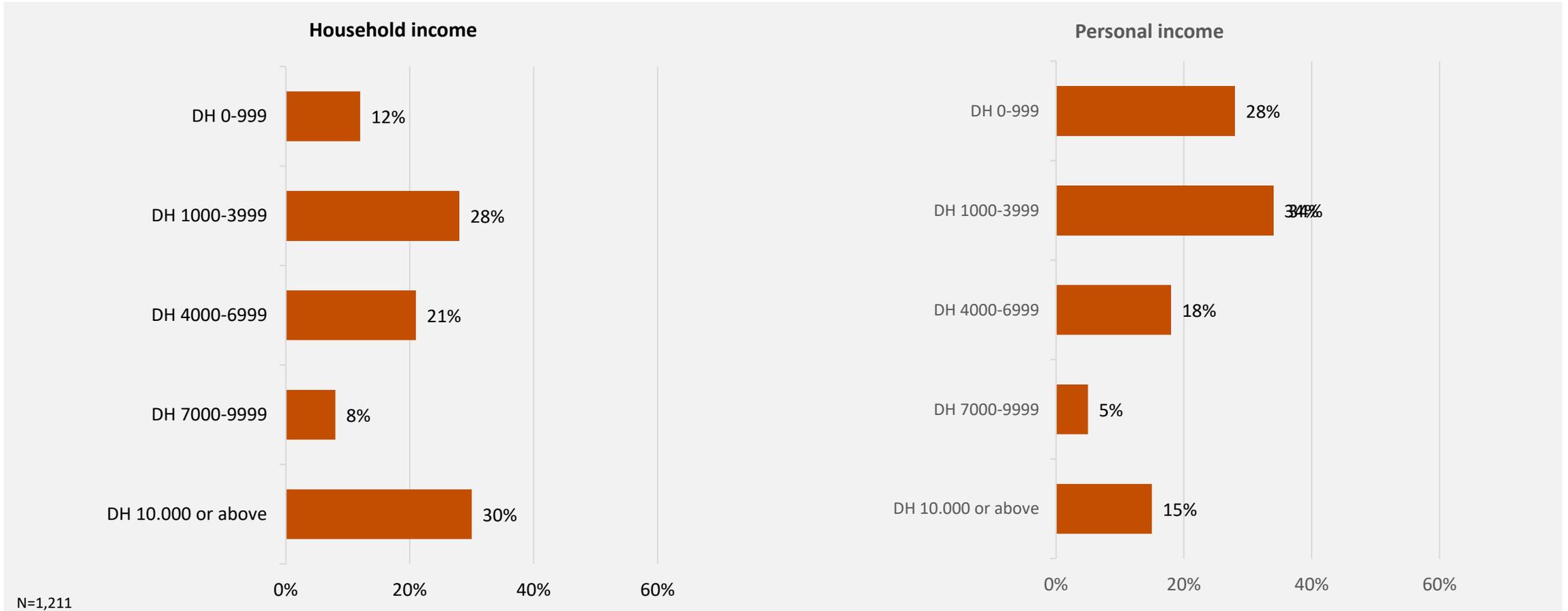
The interviews were conducted with a representative sample of persons aged 15 to 25 living in urban areas of Morocco, with a good spread across the major cities.

The sample of 1,211 persons has a statistical uncertainty of +/- 2.82%-points based on a 95% confidence level.

MAIN DEMOGRAPHICS OF THE SAMPLE



OVERVIEW OF THE INCOME LEVEL OF THE SAMPLE





THE JOURNEY FOR BETTER
INSIGHTS BEGINS HERE!



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